AUSTRALASIAN
Gaming Council

A GUIDE TO AUSTRALASIA'S GAMBLING INDUSTRIES

Facts, Figures and Statistics

CHAPTER SEVEN

The Contribution of Australia's Gambling Industries

2017/18

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A Guide to Australasia's Gambling Industries

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Chapter 7
The Contribution of Australia's Gambling Industries

Version Control

Version	Date	Explanation
2015-16 (1.0)	January 2017	2015-16 Edition.
2015-16 (2.0)	May 2018	2015-16 Edition updated with further industry data as available.
2016-17	Febuary 2020	2017/18 Edition updated with further industry data as available.

CONTRIBUTION TO THE AUSTRALIAN ECONOMY

Gross Domestic Product and Estimated Industry Value Added

The size of the Australian economy is usually described in terms of gross domestic product (GDP). GDP can be defined as the total value of all final goods and services produced in an economy in a given year. This includes the sum of private consumption, gross investment, government spending and exports minus imports.[1] 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.[2]

IBISWorld Pty Ltd[3] estimates that the following industry sectors (the majority of members of which provide gaming and/or wagering services and/or products) contributed significantly to the Australian economy.

Table 7-1 Industry Sector Estimated Value Added and Share of the Economy (2019)

Industry Sector[4]	Revenue ($million)	Industry Value Added (IVA) ($million)	Share of the Economy (GDP) (%)
Casinos[5]	6,665	3,482	0.25
Gaming and Vending Machine Manufacturers[6]	557	242	0.02
Horse and Dog Racing[7]	1,482	359	0.03
Horse and Sports Betting[8]	4,335	1,296	0.09
Lotteries[9]	6,545	735	0.05
Pubs, Bars and Nightclubs[10]	17,800	5,215	0.37
Social Clubs[11]	11,351	5,203	0.37

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

Gambling industry contributions also assist in maintaining economic sustainability and supporting jobs in related sectors. For example, in 2018-19 Tabcorp returned $1 billion the Australian racing industry and a further $800 million was contributed to retail partners with TAB facilities.[12]

[1] Allen Consulting Group (2009) *Casinos and the Australian Economy*: Report to the Australasian Casino Association.
[2] IBISWorld Industry Report R9201 *Casinos in Australia,* January 2019.
[3] http://www.ibisworld.com.au
[4] 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.
[5] IBISWorld Industry Report R9201 *Casinos in Australia,* January 2019. The casino sector includes 13 casinos operating throughout Australia. Revenues include revenues from table games, EGMs and associated entertainment and accommodation facilities directly owned or operated by casinos.
[6] IBISWorld Industry Report C2499b *Gaming and Vending Machines Manufacturing in Australia*, October 2019. Companies in these industries primarily manufacture gaming machines and vending machines that dispense various packaged goods. Gaming machine manufacturers account for the majority of the industry sector, vending machine manufacturers account for a lesser group.
[7] IBISWorld Industry Report R9120 *Horse and Dog Racing in Australia*, December 2018. This sector includes horse and dog racing operators with horse racing including thoroughbred and trots racing. Breeding, wagering and other ancillary services are not included in this sector.
[8] IBISWorld Industry Report R9209 *Horse and Sports Betting in Australia*, October 2013. Businesses in this industry provide totalisator, betting and other gambling services, excluding casino and lottery operation. The industry includes TABs, on-course totes, bookmakers and wagering websites.
[9] IBISWorld Industry Report R9202 *Lotteries in Australia*, February 2019 Businesses in this category operate lotteries or sell lottery tickets and include lotto, traditional lottery draws, instant scratch tickets, soccer pools, bingo and keno.
[10] IBISWorld Industry Report H4520 *Pubs, Bars and Nightclubs in Australia*, June 2019. Operators in this industry sector operate licensed bars, hotels, nightclubs and wine bars with their main activities being the sale of liquor for consumption both on and off premise, the provision of meals and the provision of gaming and wagering facilities.
[11] IBISWorld Industry Report H4530 *Social Clubs in Australia,* February 2014. This sector includes clubs or associations in the gambling, sporting, social or recreational areas that generate income predominantly from the provision of hospitality services. Clubs that mainly provide sporting services (including racing clubs are not included). The sector covers both licensed and unlicensed clubs and clubs with gambling licences.
[12] Tabcorp Holdings Limited (2019) *Corporate Responsibility Report 2019*

CAPITAL EXPENDITURE

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

Casinos

From 2006-07 to 2016-17, the capital expenditure of Australian casinos increased from $1.94 billion to $3.061 billion, with the majority of the capital expenditure ($1.4 billion) in 2016-17 dedicated to the payment of wages and salaries[13].

Table 7-2 Australian Casino Capital Expenditure (2006-07 – 2016-17)

Operating Expenditure	2006-07		2016-17	
	($m)	%	($m)	%
Wages/Salaries/Allowances (inclusive Superannuation)	849	44	1,486.8	49
Labour on-costs	168	9	125.7	4
Utilities	53	3	70.6	2
Repairs/Maintenance	62	3	72.6	2
Cost of Goods Sold[14]	167	8	269.3	9
Other Costs	645	33	1,036.4	34
Total	**1,944**	**100**	**3,061.3**	**100**

Source: Australasian Gaming Council - 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

Clubs and Hotels

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

90% of the respondents to a survey undertaken by PricewaterhouseCoopers in 2009 for the Australian Hotels Association reportedly undertook capital expenditure to improve hotel facilities, with the average spend being approximately $2.3 million dollars.[15]

A more recent survey of the hotel industry in South Australia (2016) indicates that in the past five years $664 million in capital expenditure was invested to improve hotel facilities: $503 million (76%) on venues in the metropolitan area; and $161 million (24%) on non-metropolitan venues.[16]

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

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

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

[13] Australasian Gaming Council - 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

[15] PricewaterhouseCoopers (2009) *Australian Hotels, More Than Just a Drink and a Flutter: An Overview of the Australian Hotels Industry*, *Report for the Australian Hotels Association*.
[16] South Australian Centre for Economic Studies, University of Adelaide (2016) *Economic Contribution of the Hotel Industry in South Australia*, commissioned by the Australian Hotels Association, South Australia.

EMPLOYMENT

National

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

The Australasian Gaming Council undertook a survey of 11 of 13

IBISWorld Pty Ltd[17] estimates that various industry sectors (the majority of members of which provide gaming and/or wagering services and/or products) employed the following numbers for the 2019 period.

Table 7-4 Industry Sector Estimated Employment, Wages and Average Wages (2019)

Industry Sector[18]	Establishments	Employment[19]	Wages ($million)[20]	Average Wage($)
Casinos[21]	13	28,209	1,863	66,042
Gaming and Vending Machine Manufacturers[22]	101	1,001	115	57,100
Horse and Dog Racing[23]	2,189	13,791	284	33,235
Horse and Sports Betting[24]	777	4,690	320	68,230
Lotteries[25]	448	2,059	120	58,280
Pubs, Bars and Nightclubs[26]	7,444	78,673	3,815	48,491
Social Clubs[27]	1,942	59,252	3,405	57,477

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

Apart from the broad national sector estimates provided, some data is available from previous periods regarding specific gambling industries and employment numbers.

[17] http://www.ibisworld.com.au
[18] 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.
[19] The number of permanent, part-time, temporary and casual employees, working proprietors, partners, managers and executives within the industry.
[20] This refers to the gross total wages and salaries of all employees in the industry. Benefits and on-costs are included in this figure.
[21] IBISWorld Industry Report R9201 Casinos in Australia, November 2019.The casino sector includes 13 casinos operating throughout Australia and associated entertainment and accommodation facilities directly owned or operated by casinos.
[22] IBISWorld Industry Report C2499b *Gaming and Vending Machines Manufacturing in Australia*, October 2019. Companies in these industries primarily manufacture gaming machines and vending machines that dispense various packaged goods. Gaming machine manufacturers account for the majority of the industry sector, vending machine manufacturers account for a lesser group.
[23] IBISWorld Industry Report R9120 *Horse and Dog Racing in Australia*, December 2019. This sector includes horse and dog racing operators with horse racing including thoroughbred and trots racing. Breeding, wagering and other ancilliary services are not included in this sector.
[24] IBISWorld Industry Report R9209 *Horse and Sports Betting in Australia*, October 2013. Businesses in this industry provide totalisator, betting and other gambling services, excluding casino and lottery operation. The industry includes TABs, on-course totes, bookmakers and wagering websites.
[25] IBISWorld Industry Report R9202 *Lotteries in Australia*, February 2019 Businesses in this category operate lotteries or sell lottery tickets and include lotto, traditional lottery draws, instant scratch tickets, soccer pools, bingo and keno.
[26] IBISWorld Industry Report H4520 *Pubs, Bars and Nightclubs in Australia*, February 2014. Operators in this industry sector operate licensed bars, hotels, nightclubs and wine bars with their main activities being the sale of liquor for consumption both on and off premise, the provision of meals and the provision of gaming and wagering facilities.
[27] IBISWorld Industry Report H4530 *Social Clubs in Australia,* February 2014. This sector includes clubs or associations in the gambling, sporting, social or recreational areas that generate income predominantly from the provision of hospitality services. Clubs that mainly provide sporting services (including racing clubs) are not included. The sector covers both licensed and unlicensed clubs and clubs with gambling licences.

Casinos

In 2013-14, Australian casinos reported direct employment of 19,657 people (FTE), which has been estimated to generate between 34,700 to 49,600 jobs in terms of consumption and production flow-on impacts.[28]

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

Work Type	Number	Percentage (%)
Full time	11,213	46.89%
Part time	5,574	23.31%
Casual	6,128	25.63%
Trainees	996	4.17%
Total	**23,911**	**100%**

Source: Australasian Gaming Council - 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.

Wages and salaries represent the largest expense for the casino industry, comprising over 40 per cent of total operating expenditure in 2016-17.[29]

Owing to the diversity of the hospitality offer at most casinos and integrated resorts occupational groupings 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 - 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.

[28] South Australian Centre for Economic Studies, The University of Adelaide (2015) *Responsible Gambling and Casinos*.
[29] Australasian Gaming Council - 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.[30]

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.

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

Hotels

PricewaterhouseCoopers Consulting have conducted the most recent survey of members of the AHA (Australian Hotels Association) in 2017. There were 699 respondents which represented approx.. 20% of AHA members.

The survey estimates that AHA member venues employed approx. 215,000 people at the end of June 2017[31]

Table 7-8 Categories of Employment in AHA Venues, 2016/17 [32]

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

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

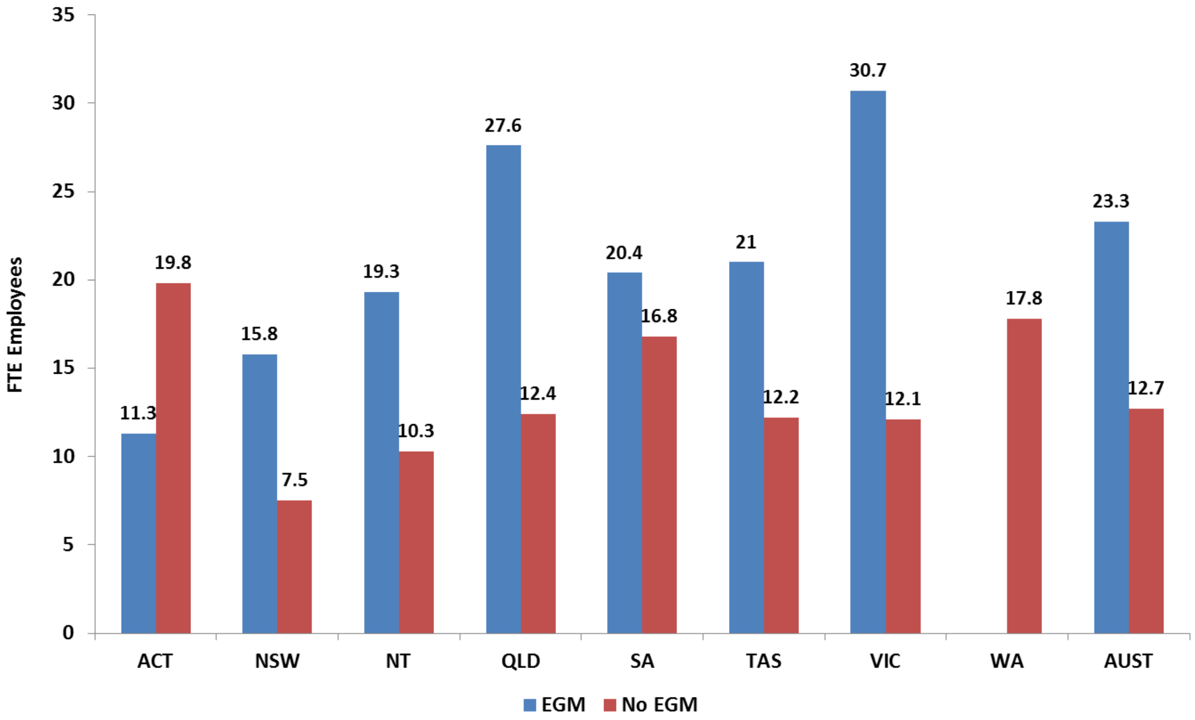
Table 7-9 Employee age groups, 2016/17 [33]

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

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

[31] Australian Hotel Association - 2018 Member Survey –results and findings – July 2018
[32] As Above
[33] As Above

Figure 7-3 Employment at hotels in Australia by state/territory and EGM operation (2009)



Source: PriceWaterhouse Coopers (2009) Australian Hotels, More Than Just a Drink and a Flutter: An Overview of the Australian Hotels Industry.

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

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

The South Australian hotel industry had total employment of 26, 250 as at December 2015, representing 3.2 per cent of South Australia's total employment.[34]

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.

[34] 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 7-11 Average number of employees at hotels in South Australia by region (2015)

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

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

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

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

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

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

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

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. [35]

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.

A 2013 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 more than 26,600 FTE jobs in the Victorian economy with estimates for each racing sector reported as 19,613 FTE (thoroughbred racing), 3,991 FTE (harness racing) and 3,015 FTE (greyhound racing).[36]

In 2016 a social and economic impact report commissioned by Racing and Wagering Western Australia (RWWA) concluded that the direct impact on employment generated by the activities of the racing industry in WA alone sustains more than 7,360 FTE positions each year. [37]

[35] Productivity Commission (2010) *Gambling, Report no 50*, Canberra p16.5
[36] IER (2013) *Size and Scope of the Victorian Racing Industry,* prepared for Racing Victoria, Harness Racing Victoria, Greyhound Racing Victoria and the Victorian State Government.
[37] IER (2016) *Western Australian Racing Industry: Economic and Social Impact Report - Highlights, prepared for Racing and Wagering Western Australia*.

Table 7-15 Estimated employment in select thoroughbred racing industry sector occupations in Australia (2018-19)

Type	Estimated Number employed
Amateur Jockeys	82
Apprentice Jockeys	191
Jockeys	849
Trainers	3,119

Source: Australian Racing Board (2018) Australian Racing Fact Book 2018.

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.[38]

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

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.[39]

[38] Harness Racing Australia (2013) *Annual Report 2013.*
[39] Australian Bureau of Statistics (2020) 5249.0 Tourism Satellite Account: 2018/19 (Explanatory Notes).

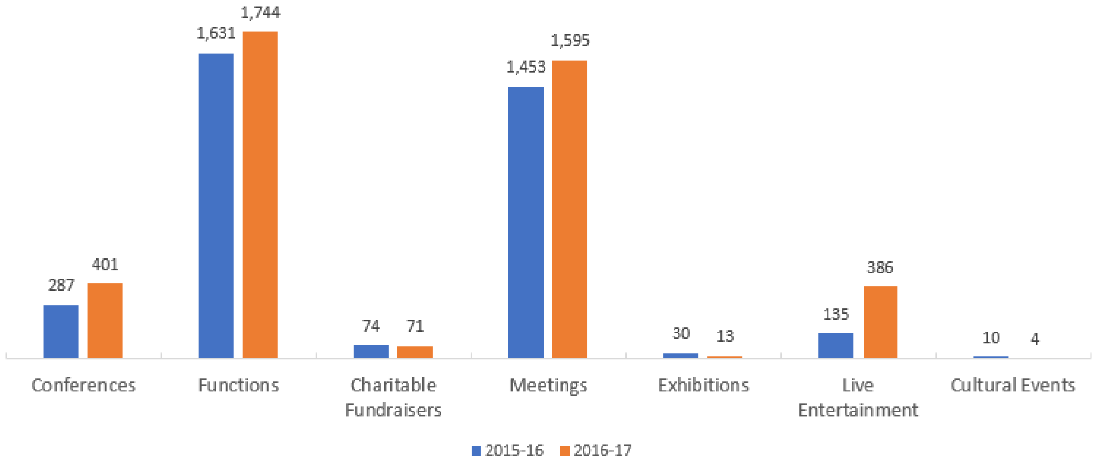
Table 7-18 Direct Tourism Gross Value Added

Tourism characteristic industries GVA	2014-15	2015-16	2016-17	2017-18	2018-19
Casinos and other gambling services	$610m	$661m	$690m	$728m	$768m
Pubs, Clubs, Taverns and Bars	$2,916m	$3,129m	$3,272m	$3,454m	$3,663m

Source: Australian Bureau of Statistics (2020) 5249.0 Tourism Satellite Account: 2018/19

Tourism: Casino visitors

Figure 7-4 Australian Casino Event Types 2015-16 and 2016-17



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

Table 7-20 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 - Australasian Casino Industry Survey 2015-16 & 2016-17

Estimating precise numbers for casino gambling visitation can be difficult - visitation numbers generally include tourists attending multiple attractions offered at casino complexes such as hotels, function rooms, convention centres, restaurants, shops and other entertainment facilities.

Domestic Tourism Expenditure

Tourism statistics from 2015 to 2016 similarly show that gambling attracts a significant proportion of Australia's domestic tourism dollar.

Table 7-21 Expenditure by day visitors: Total trip expenditure by item of expenditure (2018-19)

Expenditure items	Trip expenditure ($million)	
	Year ending Sept. 2018	Year ending Sept. 2019
Domestic airfares	815	850
Package Tours	np	np
Organised Tours	71	51
Rental vehicles	97	106
Petrol	5 139	6 149
Vehicle maintenance/repairs	160	235
Taxi	130	194
Other local public transport	223	221
Long distance public transport	106	76
Groceries for self-catering	1 184	1 439
Alcohol, drinks (not already reported)	1 028	1 232
Takeaways and restaurant meals	5 103	5 748
Shopping / gifts /souvenirs	5 877	6 336
Entertainment	1 053	1 167
Education fees	np	92
Convention / Conference / Seminar / Trade fair	np	np
Other expenditure nfd	833	1 272
Total	**21 971**	**25 286**

Source: Tourism Research Australia (2019) Travel by Australians: Year Ending June 20169from the National Visitor Survey.

Table 7-22 Expenditure by overnight visitors: Items of expenditure by main purpose of trip (2018-19)

Expenditure items	Holiday	Visiting friends & relatives	Business	Other	Total
	$				
Domestic airfares	3 151	2 844	5 615	497	12 107
Package tours	1 367	78	581	np	2 084
Organised tours	512	np	np	np	607
Rental vehicles	617	227	508	np	1 386
Petrol/Fuel	3 512	2 236	2 389	409	8 546
Vehicle maintenance/Repairs	np	np	np	np	186
Taxis	296	186	734	np	1 253
Other local public transport	154	105	103	np	384
Long distance public transport	211	95	np	np	375
Accommodation	10 721	2 130	6 450	717	20 018
Groceries for self catering	2 598	1 278	480	150	4 507
Alcohol, drinks (not already reported)	2 405	1 119	663	94	4 281
Takeaway and restaurant meals	6 508	3 167	2 880	468	13 023
Shopping/Gifts/Souvenirs	2 920	1 741	599	332	5 593
Entertainment	2 032	372	130	np	2 586
Education fees	np	np	np	np	113
Convention/Conference/Seminar fees	np	np	306	np	341
Other expenditure, nfd	806	128	153	416	1 502
Total	**38 063**	**15 830**	**21 829**	**3 392**	**79 116**

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

International Tourism Expenditure

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

It was reported in 2012 that Australia aimed to attract 860,000 Chinese visitors by 2020, a goal which if successful could create a tourism boom for hospitality and other industries worth up to $9 billion a year with restaurants, shopping, entertainment and accommodation a priority.[40]

Later figures from Tourism Australia report that visitors from China generated $9.2 billion in total tourism expenditure in 2016.

The Tourism 2020 Strategy now estimates that China has the potential to be worth up to $13 billion by 2020.[41]

[40] http://www.news.com.au/travel/news/australias-bush-push-for-chinese-tourists/story-e6frfq80-1226462618039
[41] http://www.tourism.australia.com/en/markets-and-research/market-regions/greater-china.html

International visitors’ expenditure comparison

Table 7-23 Average expenditure for visitors by top 5 countries of residence & expenditure items (2019)

Country of residence	Total shopping ($)	Food, drink, & accommodation ($)	Gambling ($)	Entertainment ($)
China	1383.31	2611.47	516.23	241.16
United States of America	266.35	1267.25	np	124.08
United Kingdom	312.76	1644.87	np	155.91
New Zealand	344.48	700.60	np	110.85
Japan	306.32	1221.62	np	np
Other	518.63	1766.61	352.61	145.41
Total	**581.57**	**1647.06**	**274.38**	**152.32**

Source: Tourism Research Australia (2019) International Visitors in Australia – June 2019 - Quarterly Results of the International Visitors Survey.

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 7-26 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 7-28 Total number of live music performances for one month in Adelaide by licence type (2015)

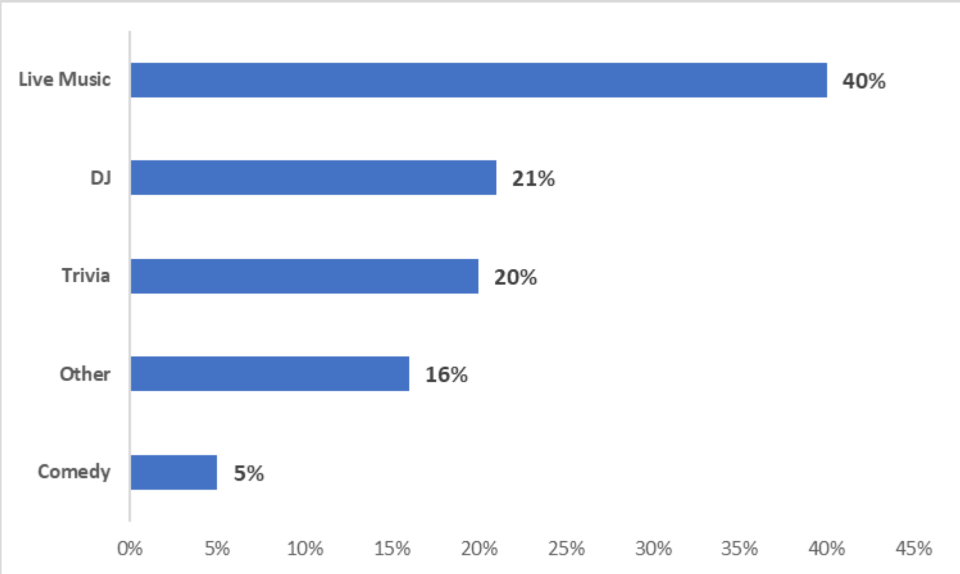
Licence type	Number of venues	Number of gigs	Percentage of total gigs
Club	8	39	4.1
Entertainment venue	3	17	1.8
Limited club	4	11	1.1
Producer	3	7	0.7
Restaurant	6	17	1.8
Small venue	1	3	0.3
Special circumstances	35	205	21.3
Total	**157**	**962**	**100**

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 7-5 Entertainment Types in Australian Hotels 2016-17



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

Events Held at Australian Casinos

In 2016-17 Australian casinos hosted 3,814 conventions and conferences which attracted approximately 779,651 attendees.

Table 7-30 Australian Casino Event Types and Attendee Numbers 2015-16 and 2016-17

	2015-16		2016-17	
Event type	**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 - Australasian Casino Industry Survey 2015-16 & 2016-17..

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, Crown Resorts, working in conjunction with Reconciliation Australia, has created and implemented a Reconciliation Action Plan (RAP) that provides employment opportunities and support for indigenous businesses.[42] Crown Resorts is also a corporate partner of the National Centre of Indigenous Excellence (NCIE), a not-for-profit organisation that provides education, sporting and cultural programs for indigenous Australians.

Crown Resorts, through the Crown Resorts Foundation, has allocated over $83 million to 300 grant recipients.[43]

[42] Crown Resorts (2014) *Crown Melbourne's Contribution to Victoria*.
[43] Crown Resorts Limited – Corporate Responsibility Report 2019

Likewise, The Star Entertainment Group has relationships with a variety of different charities and community programs. In the 2019 financial year, their "Open Your Hearts" program celebrated its 10-year anniversary. Over this time, team members at The Star Gold Coast and Treasury Brisbane nominated and supported local community organisations and charities, donating more than $220,000.

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

- **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.

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.

Racing community contributions in the 2018-19 period included:

- National Jockey's Trust;
- Team Teal – an initiative that funded awareness of and donations to the Women's Cancer Foundation via Victorian, New South Wales and ACT Harness Racing in Feb-March 2016;
- TAB Great Chase – which supports local charities through Greyhound Racing Victoria;
- Australian Trainers Association – including support for the Australian Trainers Trust; and
- Thoroughbred Breeders Victoria.

Community contributions – managed via Tabcorp's community engagement program (Tabcare) included promotion, support, volunteering and matched fundraising with organisations such as:

- Prostate Cancer Foundation of Australia
- Starlight Children's Foundation
- OzHarvest
- Conservation Volunteers Australia

Tabcorp contributed approximately $9.6m to charitable organisations in 2018/19. Over $1.2m in contributions were made to drought relief in NSW and Queensland from Tabcorp, SKY, TAB, Golden Casket and employee contributions.

Golden Casket facilitated contributions of over $1.8m to charities in Queensland, including the Mater Hospital, Children's Hospital Foundation and Starlight Children's Foundation. Tabcorp helped the 50-50 Foundation partner with Sport Australia and the Australian Sports Foundation to launch Play for Purpose, Australia's Sport and Charity Raffle, which raised over $1.0m for 98 Australian charities and 108 sporting clubs.

Australian Capital Territory

Problem Gambling Assistance Fund (PGAF)

The Problem Gambling Assistance Fund requires gaming machine licensees to pay a levy of 0.75 per cent of gross gaming revenue and contributions on a voluntary basis from Tabcorp and Casino Canberra.[44]

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).[45]

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.

Total contributions by clubs to the ACT community was $11.531m.

Registered Clubs

Table 7-31 Community contributions by registered clubs - ACT (2018-19)

Area	Total Contributions ($)
Charitable and Social Welfare	1,041,880
Community infrastructure	77,199
Non-profit activities	1,250,575
PGAF	6,507,153
Problem Gambling	783,855
Sport and recreation	1,839,177
Women's sport	57,684
Total	**11,530,523**

Source: ACT Gambling and Racing Commission (2016) Community Contributions made by Gaming Machine Licensees 2018-19.

Table 7-32 Community contributions by registered clubs – ACT comparison (2008-09 – 2018-19)

Financial Year	Total Approved Contributions $m (amended)	Total Club NGMR $m	Community Contributions as a % of NGMR[46]	% change of contributions from previous year
2018-19	13.531	94.515	12.2	-4.5
2017-18	12.077	95.321	12.7	+1.6
2016-17	11.883	94.646	12.6	+2.0
2015-16	11.736	94.235	12.45	+1.6
2014-15	11.841	94.109	12.58	-6.0
2013-14	12.591	95.779	13.15	-1.6
2009-10	13.236	97.635	13.56	+0.4
2008-09	13.669	98.647	13.86	+9.8

[44] ACT Gambling and Racing Commission (2019) https://www.gamblingandracing.act.gov.au/community/problem-gambling-assistance-fund (accessed 07/02/2020).
[45] ACT Gambling and Racing Commission (2019) https://www.gamblingandracing.act.gov.au/community/problem-gambling-assistance-fund (accessed 07/02/2020).
[46] NGMR is Net Gaming Machine Revenue as defined by the *Gaming Machine Act 2004.*

Hotels and Taverns

Licensed gaming machine hotels in the Australian Capital Territory contributed $6,300 to the community in 2018-19 (5.27% of NGMR).[47]

New South Wales

Responsible Gambling Fund (RGF)

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

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

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

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

- 54 Gambling Help face-to-face counselling services in almost 276 suburbs and towns across NSW
- Eight multi-region Gambling Help services offering specialist assistance for people from culturally and linguistically diverse backgrounds
- Four Aboriginal specific Gambling Help services
- 24-hour Gambling Help Online counselling service.

In 2018-19, $12,566,030 was distributed in counselling and treatment grants, and $441,855 distributed for research and other purposes.[48]

ClubGRANTS Scheme[49]

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

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

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

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

and

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

[47] ACT Gambling and Racing Commission (2016) *Community Contributions made by Gaming Machine Licensees 2018-19*.
[48] NSW Government, Department of Industry (2019) *Annual Report 2018-19*
[49] Liquor and Gaming NSW (2017) *ClubGRANTS Guidelines: Gaming Machine Tax Act 2001*, August 2017.

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

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

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

Northern Territory

Community Benefit Fund (CBF)

Under the *Gaming Control Act*, 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 Gaming Control Act. These funds are directed to community development projects and the amelioration of problem gambling.

In 2017-18 the Community Benefit Fund received $4.899m from the levy on electronic gaming machines in Licensed Clubs[50] and $11.968m from Casinos and Hotels.[51]

Table 7-33 Northern Territory Community Benefit Fund Major Community Organisation Grants 2017-18

Region	Applications Received		Amount Requested $		Amount Approved $		Number Approved	
	2016-17	2017-18	2016-17	2017-18	2016-17	2017-18	2016-17	2017-18
Arnhem	21	16	2,661,567	2,101,502	236,610	540,801	3	5
Barkly	12	11	1,274,626	1,182,905	182,566	308,470	4	3
Central	31	40	3,018,079	4,012,752	250,320	1,569,332	7	21
Katherine	28	19	3,036,342	1,733,358	816,339	478,906	7	6
Multi-Region	39	39	3,580,191	3,400,587	332,558	502,113	8	12
Northern	134	139	10,766,136	12,504,042	1,808,329	3,853,012	28	49
Total	**265**	**264**	**24,336,941**	**24,935,146**	**3,626,722**	**7,252,634**	**57**	**96**

Source: Northern Territory Government (2018) Community Benefit Fund Annual Report 2017-18

[50] *Northern Territory Government (2018) Community Benefit Fund Annual Report 2017-18*
[51] *AS above*

Table 7-34 Northern Territory Community Benefit Fund Small Community Organisation Grants 2017-18

Region	Applications Received		Amount Requested $		Amount Approved $		Number Approved	
	2016-17	2017-18	2016-17	2017-18	2016-17	2017-18	2016-17	2017-18
Arnhem	16	10	124,693	81,860	79,078	25,951	10	4
Barkly	12	6	75,505	48,080	45,353	23,655	7	3
Central	47	53	324,550	369,252	137,206	195,127	23	31
Katherine	29	17	240,587	106,990	117,209	75,410	16	11
Multi-Region	37	30	223,940	230,156	107,067	86,911	21	15
Northern	242	197	1,662,593	1,376,751	797,213	928,581	113	137
Total	**383**	**313**	**2,651,868**	**2,213,089**	**1,283,126**	**1,335,635**	**190**	**201**

Source: Northern Territory Government (2018) Community Benefit Fund Annual Report 2017-18

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.[52]

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

Grants are allocated to approved not-for-profit organisations to help provide services or activities that benefit the community. In 2018-19 more than $71 million dollars from the Gambling Community Benefit Fund was distributed to 3,355 approved applicants from local community organisations across Queensland.[53]

Table 7-35 Summary of Gambling Community Benefit Fund applications and approvals

Funding Round	Applications	Approved	$ Total Approved
96	1,588	657	13,855,866
97	1,716	732	14,169,289
98	1,504	640	13,835,496
99	1,430	646	13,877,357
100	1,685	669	14,305,997
Commemorative Grants	834	11	1,192,410
Total	**8,757**	**3,355**	**71,263,416**

[52] 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*
[53] Queensland Government, Office of Liquor and Gaming Regulation 2018-19 Statistical Report

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 7-36 Health Services Levy on Gaming Machines in Hotels 2016

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 (2016) Fee and Charges: Queensland Gaming Licensing (as at 1 July 2016).

Community Benefit Statement

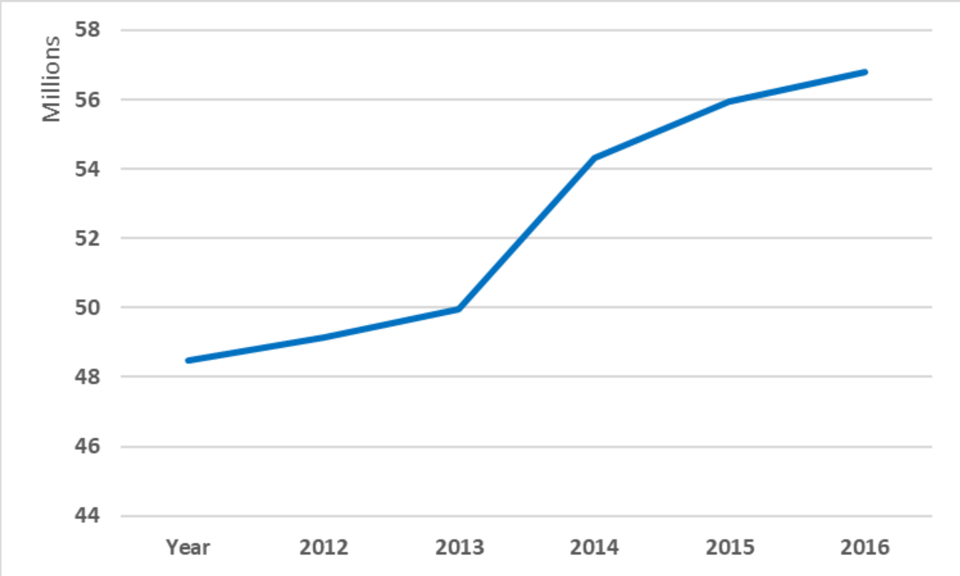
In Queensland clubs with 51 or more gaming machines are required to submit a Community Benefit Statement to the Office of Liquor and Gaming Regulation as part of their annual reporting responsibilities.

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

In 2016 Queensland clubs contributed $42,288,271 in cash and $13,659,144 in non-cash contributions to community organisations – a total of $55,947,415.[54]
In 2017 Queensland clubs donated $43,212,227 in cash and $13,487,012 in non-cash contributions to community organisations – a combined total of $56,799,239[55]

[54] Queensland Government, Department of Justice and Attorney-General (2019) https://www.justice.qld.gov.au/publications-policies/reports/olgr-reports/cbf-statements (accessed 10/02/2020).
[55] As above

Figure 7-7 Total Community Benefit Contributions by Queensland Clubs (2011-2017)



Source: https://www.justice.qld.gov.au/publications-policies/reports/olgr-reports/cbf-statements

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 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 for Communities and Social Inclusion and supports the Gambling Help Services, the 24-Hour Gambling Help Line, community education programs, research and evaluation, and administrative costs.

Tasmania

Community Support Levy (CSL)

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

In addition, 4% of Tasmanian monthly betting exchange commission, derived from brokered wager events held in Australia, is paid to the CSL.[56]

Funds from the CSL are held in trust by the Department of Treasury and Finance, and administered by the Department of Health and Human Services through the Gambling Support Program.
Funds from the CSL are distributed in the following manner:-

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

[56] Tasmanian Gaming Commission (2016) *Annual Report 2018-19*

In 2018-19, $4,179,878 was paid into the CSL from the profits of gaming machines in clubs and hotels and from betting exchange commission.[57]

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

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

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

Victoria

Community Support Fund (CSF)

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

The fund receives revenue generated from electronic gaming machines (EGMs) located in Victorian hotels.

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.

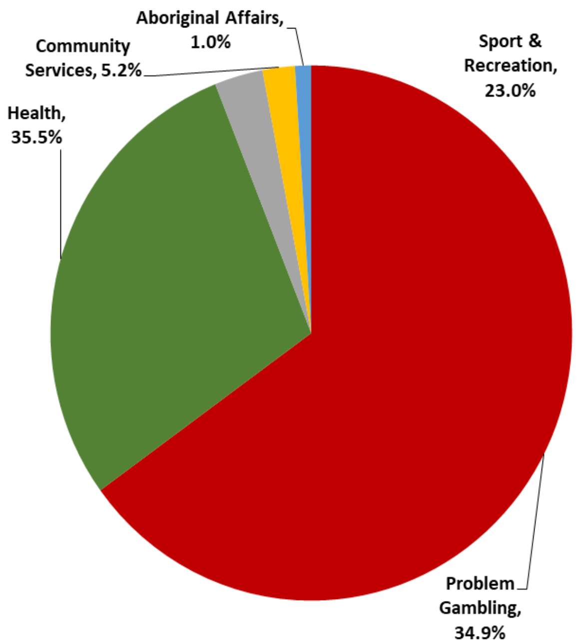
In 2017-18, the CSF received $146.7 million in revenue from gaming machines in hotels. A further $0.4 million was received in interest and $0.1 million of receipts from forfeited winnings.[58]

The majority of gaming revenue goes directly to key areas – such as Victoria's hospitals and Charities in the health sector. Other monies are distributed to Victorian Government departments and are invested in a range of community programs and projects.

Investments from the CSF are made based on community need - rather than being matched to gaming expenditure in any given area.

[57] As above
[58] Victorian Department of Treasury and Finance (2016) *Community Support Fund: Fact Sheet 2017-18*, and (accessed 10/02/2020).

Figure 7-8 CSF expenditure by portfolio 2017-18[59]



Source: Victorian Department of Treasury and Finance (2016) Community Support Fund: Fact Sheet 2017-18.

Table 7-38 Community Support Fund Expenditure by Portfolio – Victoria (2017-18)

Department of Health and Human Services			
Alcohol and Drug Treatment Services Program	The Alcohol and Drug Strategy treatment services initiative comprises of a range of core service delivery programs that provide support for individuals, families and communities who experience, or are at risk of experiencing drug and alcohol related misuse.	Drug & Alcohol Treatment and Rehabilitation	85 000 000.00
Justice Connect's Not-for-profit Law Program - 2016-17 to 2017-18	This program continues to fund the operation of Justice Connect's Not-for-profit Law Program from 2016-17 to 2017-18.	Community Services	480 000.00
Project Respect	The Project Respect *Breaking Barriers: Enhancing Employment Pathways program* aims to assist women who are seeking to transition out of, or reduce their hours in the sex industry, recognising that these workers can experience significant barriers to alternative career pathways.	Community Services	112 500.00
Community Facilities Funding Program 2014-15 - DHHS	This program aims to increase participation in sport and recreation and to address a shortfall in the quantity, quality and range of community sport and recreation facilities across Victorian communities.	Sport and Recreation	1 700 000.00
Reclink ActiVic program	The Reclink Australia ActiVic program is a place-based community lead program utilising sport, recreation, and arts programs to engage people experiencing disadvantage including alcohol and drug addiction, domestic violence, homelessness, long-term unemployment and mental health illness. ActiVic also provides recreation opportunities directed to at risk young people from the Horn of Africa and South Pacific Islander communities.	Sport and Recreation	1 000 000.00

[59] Victorian Department of Treasury and Finance (2018) *Community Support Fund: Fact Sheet 2018-19.*

Community Facilities Funding Program 2015-16 - DHHS	This program aims to increase participation in sports and recreation and to address a shortfall in the quantity, quality and range of community sport and recreation facilities in Victorian communities. This includes leisure centres, indoor stadiums, pavilions and flood lights.	Sport and Recreation	700 000.00
The Huddle	The Huddle is a not-for-profit entity established by the North Melbourne Football Cub in partnership with Scanlon Foundation and Australian Multicultural Foundation. Funding has been used to deliver programs that support young people to build on their strengths, increase their ability to participate in society and contribute to more socially inclusive communities.	Sport and Recreation	180 000.00
Department of Justice and Regulation			
Victorian Responsible Gambling Foundation (VRGF) 2015-16 to 2018-19	The VRGF is a statutory authority with the mission to improve the health and wellbeing of Victorians by working with our communities and government to deliver effective, evidence-based initiatives and innovative approaches to prevent gambling harm and provide support for those seeking help.	Responsible Gambling	38 386 000.00
Department of Premier and Cabinet			
Community Advancement Fund	This fund provides funding for a limited number of initiatives that relate to the support and advancement of the community.	Community Advancement Fund	2 000 000.00
ANZAC Day Revenue to Victorian Veterans Fund	Payment of one day's revenue from the Community Support Fund to the Victorian Veterans Fund	Community Services	266 504.79
Department of Environment, Land, Water and Planning			
Keep Victoria Beautiful Awards Programs: Tidy Towns and Sustainable Cities	The program encourages and rewards environmental and community achievements in rural, regional Victoria and Melbourne metropolitan area and large regional cities through the Tidy Towns and Sustainable Cities awards.	Community Services	176 500.00
Department of Economic Development, Jobs, Transport and Resources			
Heyfield Museum	This program assists the Heyfield & District Historical Society to purchase a former post office building to house the Heyfield Museum.	Community Services	10 000.00
		Total CSF program expense	**130 011 504.79**
DTF administration expense			253 010.50
		Adjustment for return of unspent funding from departments	(3 117 205.50)
		Community Support and Recreational Sports Package - DHHS	(2,991,345.00)
		Indigenous Cultural Strengthening Project	(84,958.39)
		Pre-commitment Information Program	(40,902.11)
		Total operating expense in 2017-18	**127 147 309.79**

Source: Victorian Department of Treasury and Finance, Community Support Fund: Expenditure by program from 1 July 2017 to 30 June 2018.

Community Benefit Statement

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

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

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

For the 2018-19 financial year, the VCGLR reported a total figure of $281,070,492 was received for community purposes or activities.[61]

Western Australia

Problem Gambling Support Services Committee (PGSSC)

The Problem Gambling Support Services Committee was formed in 1995 to bring together gambling industry and government representatives to address the social and economic issues that result from problem gambling in Western Australia.

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

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

The PGSSC funds research projects and awareness campaigns related to problem gambling. Each member makes a voluntary financial contribution which is held in a gambling support fund administered by the Department of Racing, Gaming and Liquor.

The PGSSC funds counselling and support services for those affected by gambling problems in Western Australia. Those services are:

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

A total $1,015,800 was allocated to fund these counselling and support services in 2018-19.[63]

The Gaming Community Trust (GCT)

The Gaming Community Trust (GCT) was established in 2002 to provide advice and make recommendations to the Minister for Racing and Gaming on the distribution of funds and grants for the general benefit of the community.

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[60] Victorian Commission for Gambling and Liquor (2018) https://www.vcglr.vic.gov.au/gambling/gaming-venue-operator/understand-your-gaming-licence/your-obligations/community-benefit (accessed 10/02/20).
[61] Victorian Commission for Gambling and Liquor (2017) *Combined Community Benefit Statement and Summary Figures for Local Government Area: 2018-19*
[62] Gaming and Wagering Commission of Western Australia (2016) *Annual Report 2018-19*
[63] Gaming and Wagering Commission of Western Australia (2016) *Annual Report 2018-19*

Funds administered by the GCT are derived from unclaimed winnings from a variety of gambling forms throughout the state.[64]

Lotterywest

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

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

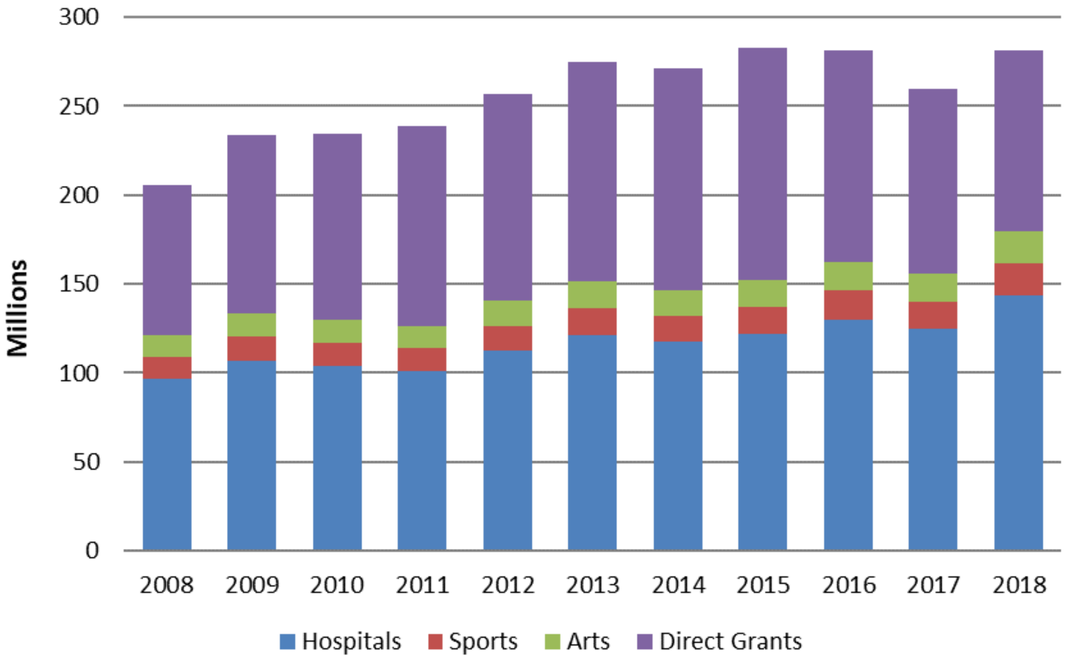
In 2018-19 Lotterywest provided $282 million worth of funding to the community.[66]

Table 7-37 Community funding by Lotterywest – Western Australia (2018-19)

Recipient	$ million
Hospitals and Health Services	$143.7
Culture and the Arts	$18
Sport and Recreation	$18
Direct Grants	$102
- $15.4 million for Perth International Arts Festival	
- $86.6m for not-for profit organisations and local government authorities	
Total	**$281.7**

Source: Lotterywest (2016) Annual Report 2019.

Figure 7-9 Lotterywest Grants Expenditure by Expense Type 2008-2018



Source: Lotterywest (2016) Annual Report 2016.

[64] Gaming and Wagering Commission of Western Australia (2016) *Annual Report 2015-16.*
[65] Lotterywest (2019) *Annual Report 2018-19.*
[66] Lotterywest (2019) *Annual Report 2018-19.*