



A GUIDE TO AUSTRALASIA'S GAMBLING INDUSTRIES

Facts, Figures and Statistics

CHAPTER ONE

The Australian Gambling Environment

2015/16

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

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 Australian Gambling Statistics 33rd 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 document refers to gaming and wagering activities that are legally provided in Australia.¹

Gaming

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

Interactive Gambling/Gaming

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

Lotteries/Instant Lotteries

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

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

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.⁶

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.⁷ 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 forms of horse and/or greyhound racing), whether on or off-course in person, via telephone or via the internet.⁸

Wagering

Wagering refers to all legal forms of gambling on racing and sporting events.⁹

¹ Government Statistician, Queensland Treasury and Trade (2017) *Australian Gambling Statistics 1990-91 to 2015-16* (33rd Edition).

² Ibid

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

⁴ Ibid

⁵ Ibid

⁶ Ibid

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

⁸ Government Statistician, Queensland Treasury and Trade (2017) *Australian Gambling Statistics 1990-91 to 2015-16* (33rd Edition)

⁹ Ibid

FORMS OF GAMBLING IN AUSTRALIA

Table 1-1 Forms of gambling in Australia by state/territory (2015-16)

Gambling Form	ACT	NSW	NT	QLD	SA	TAS	VIC	WA
Betting exchange	Australia's only betting exchange (Betfair) is licensed in Tasmania but may be accessed throughout the Australian states/territories.							
Casino gaming	✓	✓	✓	✓	✓	✓	✓	✓
Football pools	✓	✓	✓	✓	✓	✓	✓	✓
Gaming machines	Hotels and Clubs only ¹⁰	✓	✓	✓	✓	✓	✓	Casino only
Keno	✓	✓	✓	✓	✓	✓	✓	Casino only
Lotteries	✓	✓	✓	✓	✓	✓	✓	✓
Minor gaming	✓	✓	✓	✓	✓	✓	✓	✓
Online/Interactive gambling	Interactive gambling in Australia is governed by the <i>Interactive Gambling Act 2001</i> . The Act prohibits the offer of interactive gaming (online casinos, EGMs etc...) to Australian residents but makes an exception for wagering in the form of race and sports betting. Lotteries may also offer ticket sales online. Interactive gaming exists in the Northern Territory but is available only to overseas visitors.							
Racing and betting	✓	✓	✓	✓	✓	✓	✓	✓
Sports betting	✓	✓	✓	✓	✓	✓	✓	✓

Source: Government Statistician, Queensland Treasury and Trade (2017) *Australian Gambling Statistics 1990-91 to 2015-16* (33rd edition). Refer to *Australian Gambling Statistics Explanatory Notes* for further information.

¹⁰ The ACT government has passed legislation (2/11/2017) that will allow the ACT Casino to acquire up to 200 EGMs and 60 FATG's, under strict conditions, from within the existing statewide cap.

GAMING IN AUSTRALIA

Casinos

Thirteen casinos operated throughout Australia in the 2015-16 period many offering both gaming opportunities and a number of other amenities including:

- tourism and accommodation facilities;
- cultural and entertainment facilities – including theatres and showrooms;
- recreational facilities - such as games arcades, pools and gyms;
- business facilities - such as conference and meeting venues; as well as
- dining and retail shopping.

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 are placed on various table games, electronic gaming machines (which are available at all casinos in Australia with the exception of Casino Canberra in the ACT) and Keno.

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

Casinos may also provide outlets for race wagering and sports betting.

Table 1-2 Number of casinos in Australia by state/territory (2015-16)

Location		Property Name	Number of casinos
Australian Capital Territory	Canberra	Casino Canberra	1
New South Wales¹¹	Sydney	The Star Sydney	1
Northern Territory	Darwin	SKYCITY Darwin	1
	Alice Springs	Lasseters Casino	1
			2
Queensland¹²	Brisbane	Treasury Brisbane	1
	Cairns	The Reef Hotel Casino ¹³	1
	Gold Coast	The Star Gold Coast	1
	Townsville	The Ville Resort - Casino	1
			4
South Australia	Adelaide	Adelaide Casino ¹⁴	1
Tasmania	Hobart	Wrest Point Casino	1
	Launceston	Country Club Casino	1
			2
Victoria	Melbourne	Crown Melbourne	1
Western Australia	Perth	Crown Perth	1
Total			13

Source: Allen Consulting Group (2009) *Casinos and the Australian Economy*, Report to the Australasian Casino Association – with updates by the AGC.

¹¹ In July 2014 Crown Resorts was granted a licence to operate a VIP-only restricted gaming facility (without EGMs) at Barangaroo, Sydney, New South Wales from November 15, 2019.

¹² 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, due for completion in 2022. Once complete the previous Treasury Casino and Hotel will be repurposed.

¹³ Also referred to as Pullman Reef Hotel Casino, <https://www.reefcasino.com.au/>, (accessed 1/2/2018)

¹⁴ Also referred to as SKYCITY Adelaide, <https://www.adelaidecasino.com.au/>, (accessed 1/2/2018)

Table 1-3 Estimated number of casino table games and EGMs in Australia (2015-16)

Please note that figures in the following table are a snapshot, current only for the period stated. Total EGM figures noted as operational by Queensland Government Statistician as at 30 June 2016.

Location	Venue	Tables	EGMs ¹⁵
Australian Capital Territory¹⁶	Casino Canberra	39	Nil
New South Wales	The Star Sydney	291	1,500
Northern Territory¹⁷	SKYCITY Darwin	55	613
	Lasseters Casino	22	309
		77	922
Queensland¹⁸	The Star Gold Coast	74	1,455
	Treasury Brisbane	87	1,450
	The Ville Resort - Casino	25	353
	The Reef Hotel Casino	38	488
		224	3,746
South Australia¹⁹	Adelaide Casino	83 ²⁰	964 ²¹
Tasmania²²	Wrest Point Casino	25	650
	Country Club Casino	16	535
		41	1,185
Victoria	Crown Melbourne	540 ²³	2,628
Western Australia	Crown Perth	350 ²⁴	2,190
Total		1,645	13,135

Source: Government Statistician, Queensland Treasury and Trade (2017) *Australian Gambling Statistics 1990-91 to 2015-16* (33rd edition). Refer to *Australian Gambling Statistics Explanatory Notes* for further information – with updates by the AGC as specified in footnotes.

¹⁵ Operational EGMs as at 30 June 2016 by Government Statistician, Queensland Treasury and Trade (2017) *Australian Gambling Statistics 1990-91 to 2015-16* (33rd edition). Refer to *Australian Gambling Statistics Explanatory Notes* for further information.

¹⁶ The ACT government has passed legislation (2/11/2017) that will allow the ACT Casino to acquire up to 200 EGMs and 60 FATG's, under strict conditions, from within the existing state-wide cap.

¹⁷ Northern Territory Department of Business (2016) *Director-General of Licensing Annual Report 2015-16*.

¹⁸ Queensland Government (2017) Department of Justice and Attorney - General, Office of Liquor and Gaming Regulation, *Annual Statistical Report 2015-16*. Figures refer to operational rather than approved numbers.

¹⁹ Independent Gambling Authority (2016) *Annual Report 2015-16: Volume 1 and 2*.

²⁰ Amendments to the *Approved Licensing Agreement* in February 2014 limit the maximum number of tables in operation at any one time to 200.

²¹ 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 machines. To allow for the operation of any additional EGMs, the casino will be required to purchase additional entitlements through the Approved Trading Scheme.

²² 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 21/3/2018)

²³ Figure noted as approved number. *Crown Resorts Ltd (2017) Annual Report 2017*.

²⁴ Figure noted as approved number. *Crown Resorts Ltd (2017) Annual Report 2017*.

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).²⁵

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.²⁶

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.

²⁵ The ACT government has passed legislation (2/11/2017) that will allow the ACT Casino to acquire up to 200 EGMs and 60 FATG's, under strict conditions, from within the existing state-wide cap

²⁶ Adapted from the *Gaming Machines Act 2001* (NSW)

Table 1-4 State-Wide EGM Caps

Location	Clubs/Hotels	Casino(s)	Cap arrangements
Australian Capital Territory	5,022 EGMs at 2015 (with a phased reduction to 4,000 EGMs by 2020) ²⁷	200 ²⁸	<p>From 31 August 2015, amendments to the <i>Gaming Machine Act 2004</i> introduced a first phased reduction in the number of EGMs operating in the Territory to achieve a ratio of a maximum 15 EGMs to every 1,000 adult residents.²⁹</p> <p>The ACT Parliamentary Agreement for the 9th 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 ratio of 15 EGM authorisations per 1,000 adults will no longer apply.</p> <p>The ACT is now undergoing a process of surrender of authorisations to meet the reduced limit applicable by 2020.³⁰</p> <p>Number of authorisations in place³¹:</p> <ul style="list-style-type: none"> - 4,989 as at 30 June 2016 - 4,985 as at 30 June 2017 - 4,981 as at 31 May 2018
New South Wales	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.³²</p> <p>In March 2018 the NSW Government proposed to introduce a cap on existing gaming machine numbers in high risk areas.³³</p>
Northern Territory	1,734	No cap	<p>From 1 January 2015 there was no stipulated Territory-wide cap for the total number of EGMs in a community venue. On 16 November 2016 a territory-wide cap on machines of 1,852 was announced.</p> <p>On 1 June 2018, the Northern Territory Government announced a lowering of the cap on community gaming machines from 1,852 to 1,734.³⁴</p> <p>Gaming machines in the Territory's two casinos are outside the cap limit and not included in the total.³⁵</p>

²⁷ The *Gaming Machines (Reform) Amendment Act 2015 (ACT)* introduced a trading scheme for authorisations with the purpose of reducing the number of gaming machines to 15 authorisations per 1,000 adults in the Territory. There were 5,022 EGM authorisations when the trading scheme commenced and by law this number cannot be exceeded. The ACT Parliament announced in October 2016 a commitment to reduce EGM authorisations in the state to 4,000 by 2020. Since that time the number of authorisations has declined to 4,984 at 31 March 2018.

²⁸ 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.

²⁹ ACT Government, Gambling and Racing Commission (2015), *Gaming Machine Act 2004 Amendments*.

³⁰ ACT Government (2017) *Implementing the Government Commitment to Reduce Gaming Machine Authorisations Options Paper*.

³¹ ACT Government, Gambling and Racing Commission (2018) *Gaming Machine Reform Package: Trading Scheme Information Provided as at 30 June 2016; 30 June 2017 & 31 May 2018*.

³² NSW Government, *Gaming Machines Act 2001*.

³³ NSW Government, Minister Paul Toole, *Pokie numbers will not rise under new laws: Media release*, 12/3/2018.

³⁴ Northern Territory Government (2018) *Less Pokie Machines and Tackling Gambling Related Harm: Media Statement*, Natasha Fyles, Attorney-General and Minister for Justice.

³⁵ NT Government, <https://nt.gov.au/industry/gambling/gaming-machines-in-clubs-pubs> (accessed 5/4/18).

Location	Clubs/Hotels	Casino(s)	Cap arrangements
Queensland	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. ³⁶ Casinos are limited by ratio of 12 gaming machines per table game. ³⁷
South Australia	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. ³⁸
Tasmania ³⁹	2,500		A state-wide cap of 3,680 for all EGMs (all premises), with a cap of 2,500 EGMs applicable to clubs and hotels applies. ⁴⁰
Victoria	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. ⁴¹ Please note. 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. ⁴² Further caps – including regional and municipal caps – and ownership restrictions also apply ⁴³
Western Australia	N/A	2,500	Western Australia’s casino has been allocated a cap of 2,500 electronic gaming machines.

Source: Productivity Commission (2010) *Gambling*, Report no. 50, Canberra - with updates by the AGC.

³⁶ Queensland Government, *Gaming Machine Regulation 2002*.

³⁷ Queensland Government, *Gaming Machine Regulation 2002*.

³⁸ South Australian 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*.

³⁹ Tasmanian Government, Department of Treasury and Finance (2017) *Gaming and Wagering Industry Data*.

⁴⁰ 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).

⁴¹ 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.

⁴² Victorian Government *Gazette No. S 330*, Monday 9 July 2018.

⁴³ 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
Australian Capital Territory	1976	No venue cap.
New South Wales	1956	Clubs must abide by a Gaming Machine Threshold (GMT) applicable at each venue and application must be made to increase any threshold. Multi Terminal Gaming Machines (MTGM) are restricted to 15% of the EGM stock at any venue.
Northern Territory	2014	55 EGMs per venue.
Queensland	1992	300 EGMs per venue.
South Australia	1994	40 EGMs per venue.
Tasmania	1997	40 EGMs per venue.
Victoria	1992	105 EGMs per venue.
Western Australia	N/A	Not applicable.

Source: Productivity Commission (2010) *Gambling, Report no. 50, Canberra - with updates by the AGC.*

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

Location	Year legalised	Cap arrangements
Australian Capital Territory	1988	Taverns in the ACT are allowed a maximum of 2 Class B (draw poker) gaming machines. Hotels with 12 or more units of accommodation are allowed a maximum of 10 Class B gaming machines, while hotels with less than 12 units of accommodation are allowed a maximum of 2 Class B gaming machines.
New South Wales	1992	30 EGMs per venue.
Northern Territory	2014	20 EGMs per venue.
Queensland	2001	45 EGMs per venue.
South Australia	1994	40 EGMs per venue ⁴⁴
Tasmania	1997	30 EGMs per venue.
Victoria	1992	105 EGMs per venue.
Western Australia	N/A	Not applicable.

Source: Productivity Commission (2010) *Gambling, Report no. 50, Canberra - with updates by the AGC.*

⁴⁴As of 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 (2015-16)

Location	Hotels	Clubs	Casino(s)	Other	Total
Australian Capital Territory ⁴⁵	9	49	0		58 ⁴⁶
New South Wales	1,509	1,124	1		2,634 ⁴⁷
Northern Territory	40	30	2		72
Queensland ⁴⁸	736	449	4		1,189
South Australia ⁴⁹	455	69	1		525
Tasmania ⁵⁰	89	7	2	2 ⁵¹	100
Victoria ⁵²	282	244	1		527
Western Australia	N/A	N/A	1		1
Total	3,120	1,972	12	2	5,106

Sources: ACT Gambling and Racing Commission, Northern Territory Department of Business, Government Statistician, Queensland Treasury and Trade, Queensland Government Office of Liquor and Gaming Regulation, SA Independent Gambling Authority, Tasmanian Department of Treasury and Finance – Liquor and Gaming, Victorian Commission for Gambling and Liquor Regulation.

Table 1-8 Estimated number of EGMs in Australia by venue type (2015-16)⁵³

Location	Hotels	Clubs	Casino(s)	Other	Total
Australian Capital Territory	50	4,585	N/A ⁵⁴		4,635
New South Wales	23,034	69,874	1,500		94,408
Northern Territory	415	761	922		2,098
Queensland	19,247	23,488	3,746		46,481
South Australia	10,525	1,812	964		13,301
Tasmania	2,248	127	1,185	36 ⁵⁵	3,560
Victoria	13,609	12,721	2,628		28,958
Western Australia	N/A	N/A	2,190 ⁵⁶		2,190
Total	69,128	113,368	13,135	36⁵⁷	195,631

Source: Government Statistician, Queensland Treasury and Trade (2017) *Australian Gambling Statistics 1990-91 to 2015-16 (33rd edition)*. Refer to Australian Gambling Statistics [Explanatory Notes](#) for further information.

⁴⁵ Please note that hotels in the ACT are allowed Class B (draw poker) gaming machines only.

⁴⁶ ACT Gambling and Racing Commission (2016) *Annual Report 2015-16*.

⁴⁷ Government Statistician, Queensland Treasury and Trade (2017) *Australian Gambling Statistics 1990-91 to 2015-16 (33rd edition)*. Refer to Australian Gambling Statistics [Explanatory Notes](#) for further information. Figures as at 30 June 2016.

⁴⁸ Queensland Government Office of Liquor and Gaming Regulation, *Gambling Statistics: EGM range statistics for clubs & hotels, as at June 2016*.

⁴⁹ SA Independent Gambling Authority (2017) *Annual Report 2016-17, as at 30 June 2016*.

⁵⁰ Tasmanian Department of Treasury and Finance - Liquor and Gaming (2018), *Gambling industry data: List of gaming venues in Tasmania – as at 11 April 2018*.

⁵¹ Two Trans-Tasman Line Ferries are equipped with EGMs.

⁵² Victorian Commission for Gambling and Liquor Regulation (2018), *Venue Details*, <https://www.vcgr.vic.gov.au/CA256F800017E8D4/VCGLR/DBB69322DE84ADA6CA257B320077C8D3?OpenDocument>, (accessed 12/4/18).

⁵³ Operational EGMs as at 30 June 2016 by Government Statistician, Queensland Treasury and Trade (2017) *Australian Gambling Statistics 1990-91 to 2015-16 (33rd edition)*. Refer to Australian Gambling Statistics [Explanatory Notes](#) for further information.

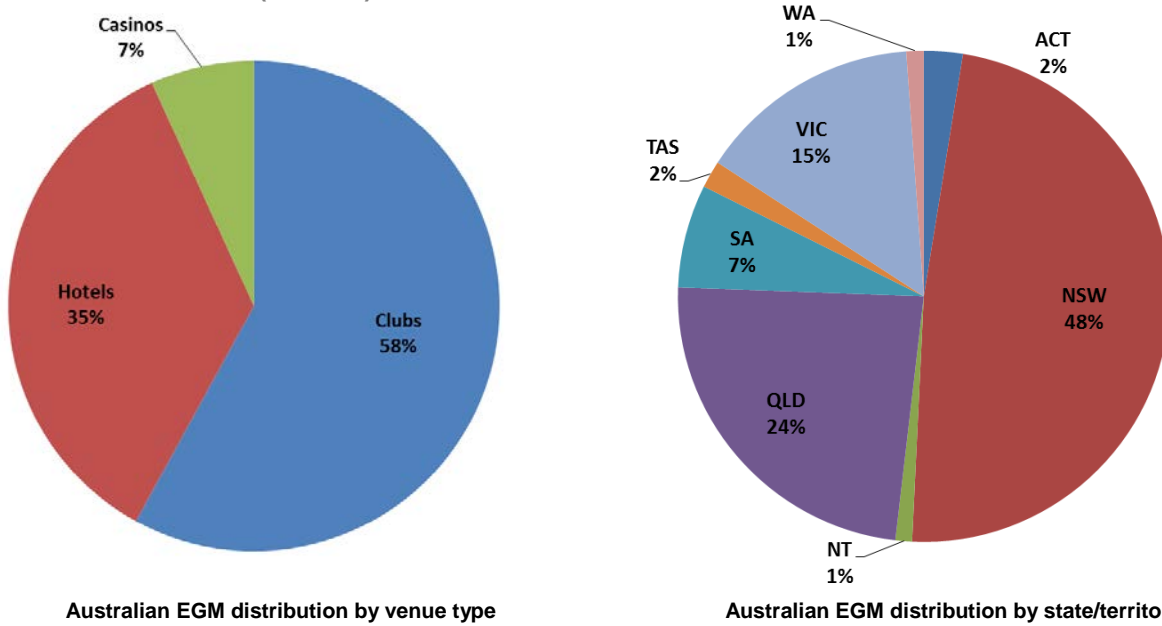
⁵⁴ The *Casino (Electronic Gaming) Act 2017* has introduced legislation that would allow the casino to operate up to 200 EGMs, to be acquired through the existing trading scheme.

⁵⁵ 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. <http://www.treasury.tas.gov.au/liquor-and-gaming/legislation-and-data/gambling-industry-data/gaming-and-wagering-industry-data> (accessed 23/2/2018).

⁵⁶ 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 will eventually take the total number of gaming machines to 2,500 in 2018.

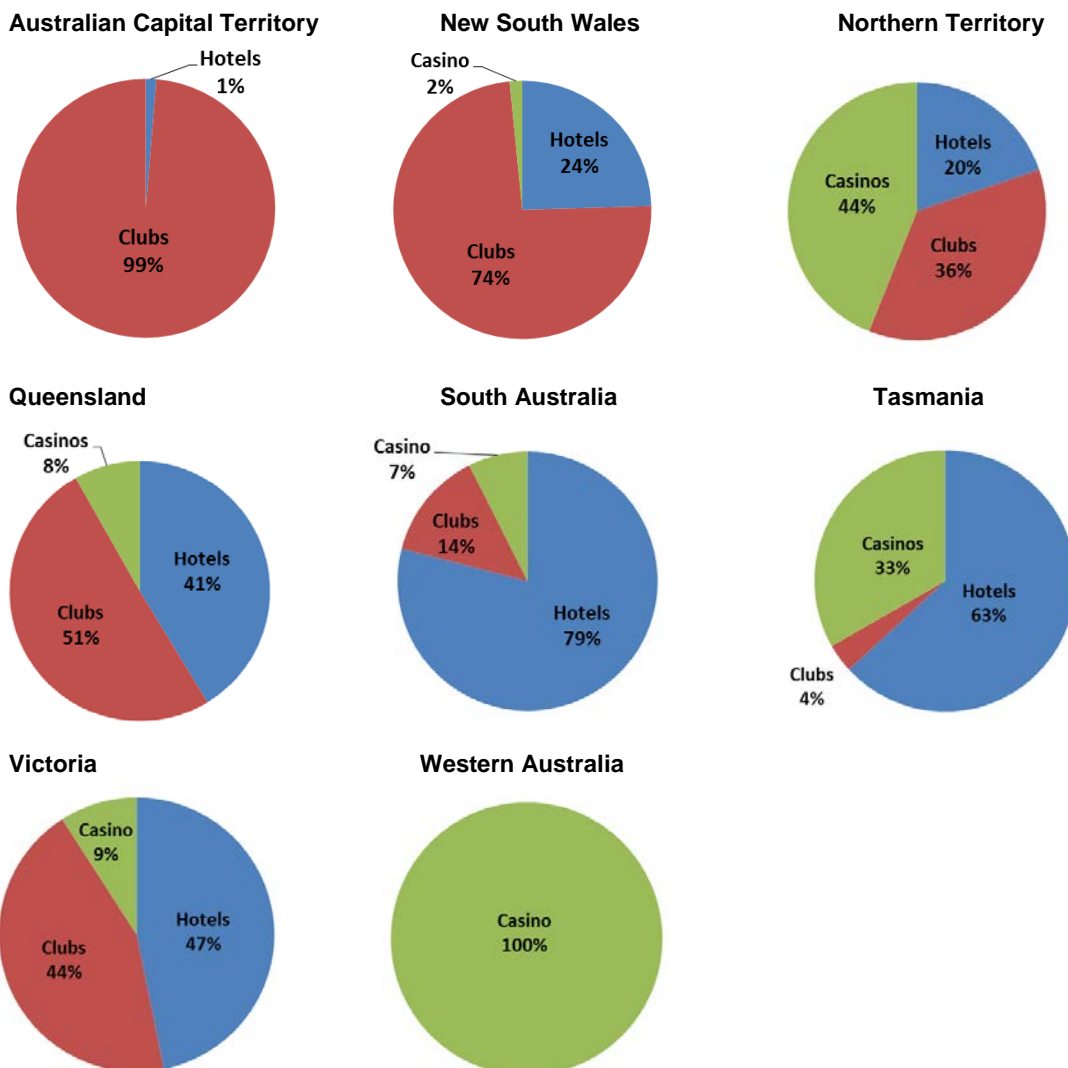
⁵⁷ Please note the 36 EGMs available on TT Line Ferries in Tasmania have not been included in the national total.

Figure 1-1 Estimated EGM distribution in Australia by venue type and state/territory (2015-16)⁵⁸



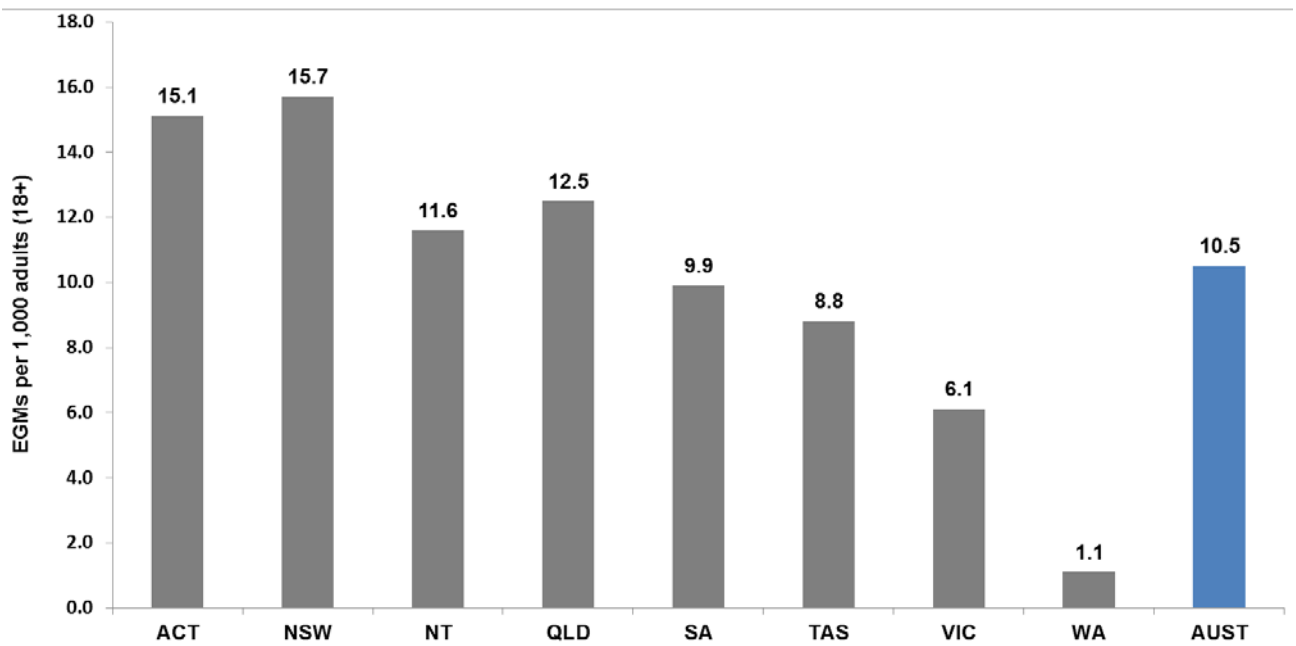
Source: Government Statistician, Queensland Treasury and Trade (2017) *Australian Gambling Statistics 1990-91 to 2015-16 (33rd edition)*. Refer to Australian Gambling Statistics *Explanatory Notes* for further information.

Figure 1-2 Estimated EGM Distribution within Australian States/Territories (2015-16)



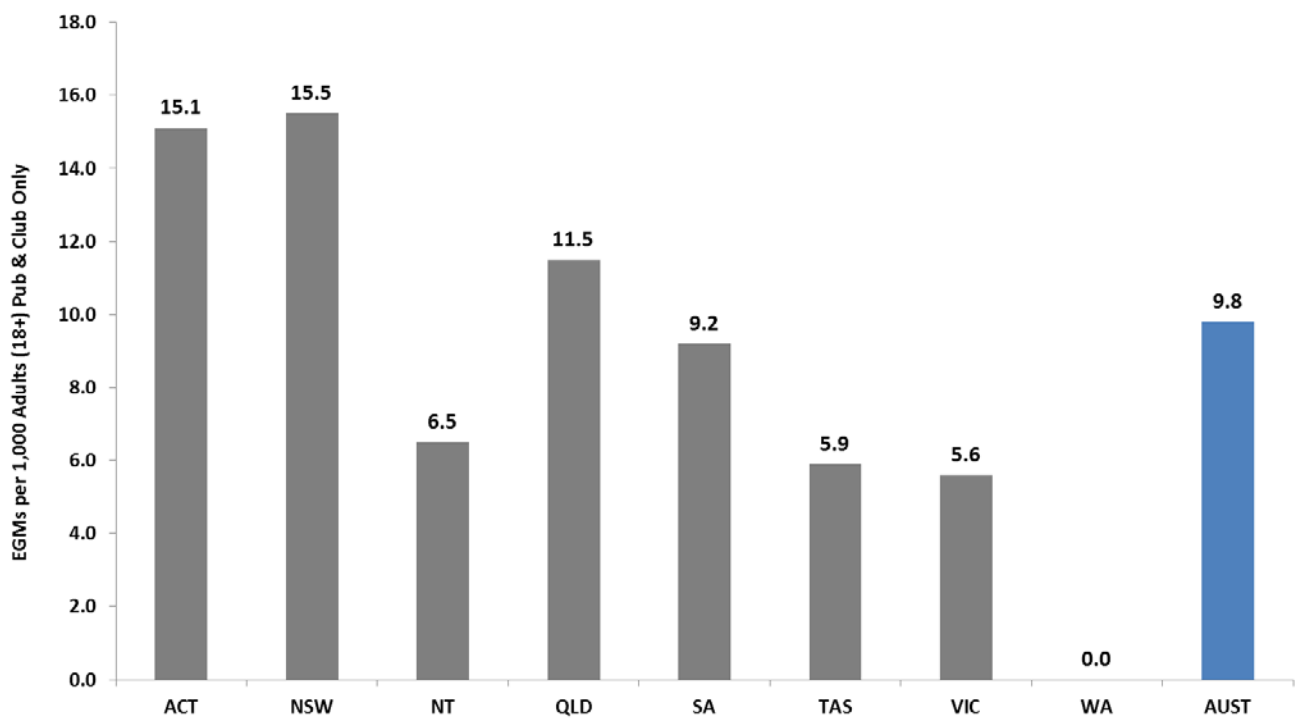
⁵⁸ Operational EGMs as at 30 June 2016 by Government Statistician, Queensland Treasury and Trade (2017) *Australian Gambling Statistics 1990-91 to 2015-16 (33rd edition)*. Refer to Australian Gambling Statistics *Explanatory Notes* for further information.

Figure 1-3 Estimated total EGMs per 1,000 adults (18+) in Australia by state/territory (2015-16)



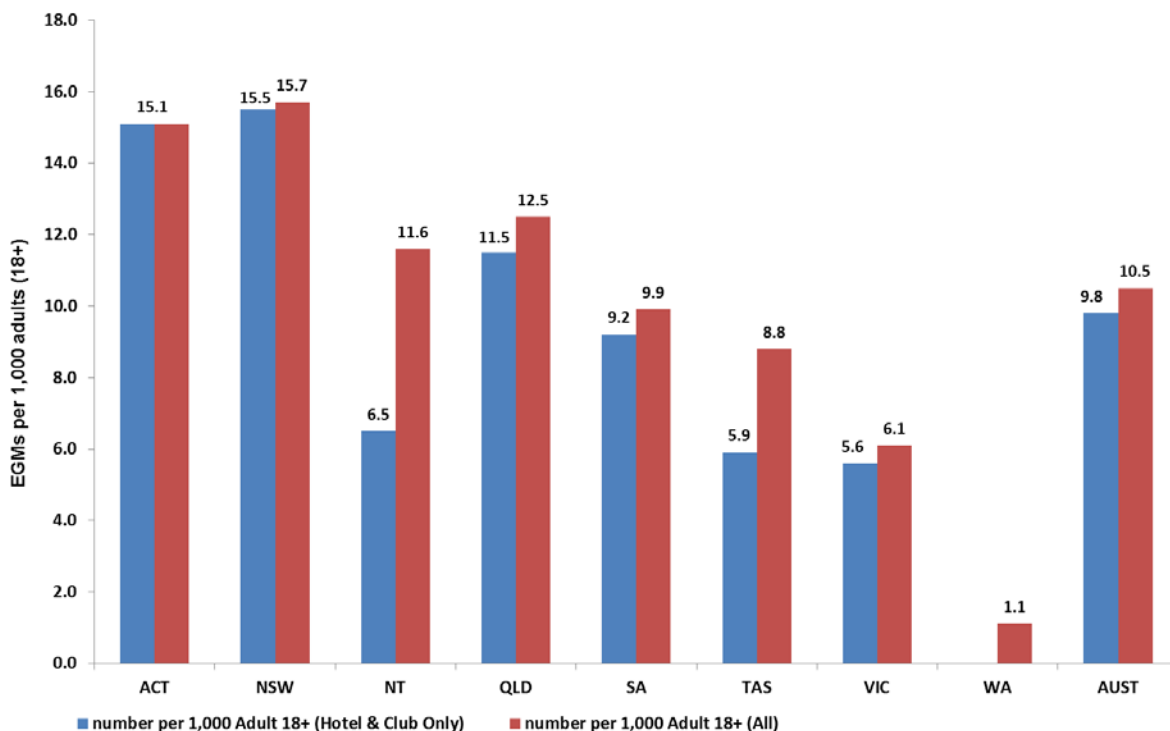
Source: ABS 3101.0 Australian Demographic Statistics, June Quarter 2016 and data collated by the AGC.

Figure 1-4 Estimated Hotel and Club EGMs per 1,000 adults (18+) in Australia by state/territory (2015-16)



Source: ABS 3101.0 Australian Demographic Statistics, June Quarter 2016 and data collated by the AGC.

Figure 1-5 Estimated EGMs (Hotel and Club Only) per 1,000 adults (18+) and Estimated EGMs (All Venues) per 1,000 adults (18+) in Australia by state/territory (2015-16)



Source: ABS 3101.0 Australian Demographic Statistics, June Quarter 2016 and data collated by the AGC.

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.⁵⁹

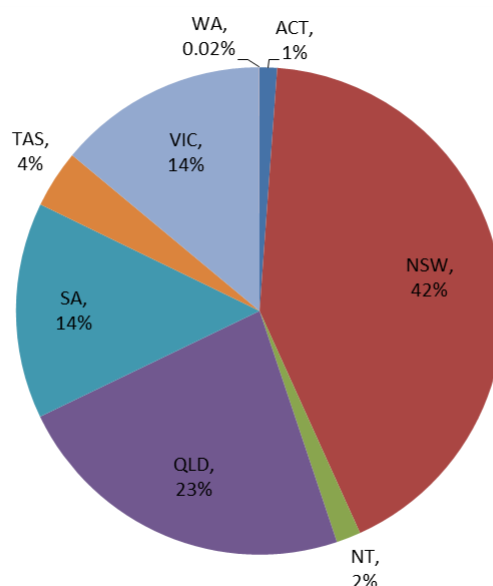
A computerised Keno system operates in clubs/hotels throughout most Australian jurisdictions and is also available at a number of casinos. Keno games may also be offered via lottery providers (e.g. SA Lotteries) or online.

Table 1-9 Estimated number of Keno outlets (land-based) in Australia by state/territory (2015-16)

Location	Keno Outlets
Australian Capital Territory	50
New South Wales	1,820
Northern Territory	70 ⁶⁰
Queensland	995
South Australia	782
Tasmania	166 ⁶¹
Victoria	603
Western Australia	1
Total	4,487

Source: Crown Perth, SA Lotteries, SKYCITY Darwin, Tasmanian Government Department of Treasury and Finance: Gambling Premises Numbers, Tabcorp Holdings Limited.

Figure 1-6 Estimated Keno outlet distribution (land-based) in Australia by state/territory 2015-16



Source: Crown Perth, SA Lotteries, SKYCITY Darwin, Tasmanian Government Department of Treasury and Finance: Gambling Premises Numbers, Tabcorp Holdings Limited.

⁵⁹ Government Statistician, Queensland Treasury and Trade (2016) *Australian Gambling Statistics 1989-90 to 2014-2015* (32nd edition).

⁶⁰ In the Northern Territory SKYCITY Darwin operates NT Keno under an agreement with the Northern Territory Government. There are 70 venues, such as pubs, clubs, and taverns, which televise NT Keno across the Territory. <https://www.skycitydarwin.com.au/nt-keno/> (accessed 4/4/2018).

⁶¹ 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 1/5/2018).

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.

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 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*⁶²

Tatts Group⁶³ is the largest lottery operator in Australia with licences in the Australian Capital Territory, New South Wales (to 2050), the Northern Territory (to 2032), Queensland (to 2072), South Australia (to 2052), Tasmania (to 2020) and Victoria (to 2028)⁶⁴.

Tatts is currently the exclusive or sole holder of public lottery licences in all States and Territories, except Western Australia.

The lottery in Western Australia, operated by the state government through Lottery West, is currently the only remaining government operated lottery structure in Australia.

Tatts holds exclusive licences or agreements to operate / manage public lotteries in New South Wales, South Australia⁶⁵ and Victoria.

Lottery operator licences in Queensland, Tasmania, the Australian Capital Territory and the Northern Territory have no guaranteed exclusivity, however Tatts, through its subsidiaries, is currently the sole licence holder.

Tatts lotteries operate under various wholly owned subsidiaries, collectively known as the Lott, including: NSW Lotteries; Tattersall's Sweeps; Golden Casket; Tatts NT Lotteries; and Tatts Lotteries SA.

Lottery, lotto and instant lottery tickets are commonly sold through newsagents and convenience outlets.

More recently, lottery products have also been made available online and via mobile applications.

⁶² Australian Competition Tribunal (2017) *Proposed acquisition of Tatts Group Limited by Tabcorp Holdings Limited: Tatts Group Limited Statement*, 8 March 2017.

⁶³ Tatts Group merged with Tabcorp in 2018.

⁶⁴ Tatts Group (2017) *Annual Report 2016-17*.

⁶⁵ The Tatts Group subsidiary Tatts Lotteries SA entered into an agreement with the South Australian Government to exclusively manage the lottery games conducted by the Lotteries Commission of South Australia.

Table 1-10 Lottery/Instant lottery providers in Australia by state/territory (2015-16)

Location	Licensee
Australian Capital Territory	Tatts Group (NSW Lotteries)
New South Wales	Tatts Group (NSW Lotteries)
Northern Territory	Tatts Group (Tatts NT Lotteries & Golden Casket) ⁶⁶
Queensland	Tatts Group (Golden Casket)
South Australia	Tatts Group (Tatts Lotteries SA) ⁶⁷
Tasmania ⁶⁸	Tatts Group (Tattersalls Sweeps & Golden Casket)
Victoria ⁶⁹	Tatts Group (Tattersall’s Sweeps)
Western Australia	Lotterywest

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

Lottery Outlets in Australia (Land-Based)

Table 1-11 Estimated number of lottery/instant lottery outlets (land-based) in Australia by state/territory (2015-16)

Location	Lottery Outlets
Australian Capital Territory	49
New South Wales	1,366
Northern Territory	24
Queensland	943
South Australia	621
Tasmania	92
Victoria	813
Western Australia	529 ⁷⁰
Total	4,437

Source: Lotterywest, Tatts Group Ltd,

Lottery retailers in Western Australia consist mainly of independent small businesses including newsagencies, specialised kiosks and pharmacies and in some regional areas, general stores and supermarkets.

Lottery outlets in Western Australia for the 2015-16 year numbered 529, of which 500 were full service outlets selling the full range of Lotterywest products and 29 of which supplied instant lottery (Scratch ‘n’ Win) products only.

368 of Western Australia’s lottery outlets are located in metropolitan areas, 77 in country locations and a further 84 are community service outlets.⁷¹

⁶⁶ The Tatts Group subsidiary Golden Casket is permitted to sell tickets in specified foreign lotteries which is due to expire on 30 June 2018.

⁶⁷ The Tatts Group subsidiary Tatts Lotteries SA entered into an agreement with the South Australian Government to exclusively manage the lottery games conducted by the Lotteries Commission of South Australia.

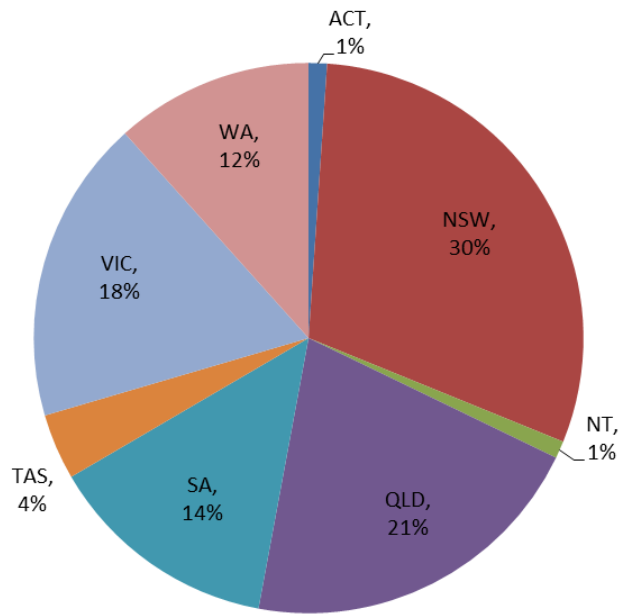
⁶⁸ Intralot Australia Pty Ltd surrendered its Category 2 Public Lottery Licence and involvement in public lotteries in Tasmania on 31 January 2015.

⁶⁹ Intralot Australia Pty Ltd surrendered its Category 2 Public Lottery Licence and involvement in public lotteries in Victoria on 31 January 2015.

⁷⁰ Lotterywest (2016), *Lotterywest Annual Report 2016*.

⁷¹ Lotterywest (2016) *Lotterywest Annual Report 2016*.

Figure 1-7 Estimated lottery and instant lottery land-based outlet distribution in Australia by state/territory 2015-16



Source: Lotterywest, SA Lotteries, Tatts Group Pty Ltd

ONLINE/INTERACTIVE GAMBLING IN AUSTRALIA

Interactive gambling (also commonly termed Internet or on-line 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.

In Australia lottery providers, licensed wagering providers and bookmakers may offer access to their products via the internet.

A number of online bookmakers are licensed in the Northern Territory and may offer their products in other Australian jurisdictions (subject to Federal and state/territory rules/regulation).

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

In Australia the website of the Federal [Department of Communications and the Arts](#) provides further information about the regulation of online gambling. The website of the [Australian Communications and Media Authority \(ACMA\)](#) also provides information about prohibited content and resources for consumers.

Table 1-12 Licensed Online Gambling Providers in Australia (2015-16)

While the below is not a comprehensive list, providers offering licensed online wagering, sports betting and lottery services in Australia include:

Provider	Type	Licensing Jurisdiction(s)
bet365	Wagering	Northern Territory
BetChoice/Unibet	Wagering	Northern Territory
Betfair	Betting Exchange	Northern Territory ⁷²
Betting.Club	Wagering	Northern Territory
Crownbet	Wagering	Northern Territory
DraftStars	Wagering	Northern Territory
Favourit	Wagering	Northern Territory
Ladbrokes	Wagering	Northern Territory
Lottoland	Wagering	Northern Territory
Lotterywest/Play Online	Lotteries	Western Australia
Luxbet	Wagering	Northern Territory
MoneyBall	Wagering	Northern Territory
Neds.com.au	Wagering	Northern Territory
PalmerBet	Wagering	New South Wales
PlayON	Wagering	Northern Territory
Plus Connect	Wagering	Northern Territory
PointsBet	Wagering	Northern Territory
Puntaa	Wagering	Northern Territory
Sportsbetting.com.au	Wagering	Northern Territory
Sportsbet	Wagering	Northern Territory
SportChamps	Wagering	Northern Territory
TAB.com.au	Wagering	Australian Capital Territory, New South Wales, Victoria
Tatts.com/The Lott	Lotteries	New South Wales, Northern Territory, Queensland, South Australia, Tasmania, Victoria, ACT
TopBetta	Wagering	Northern Territory
Tattsbet/UBET	Wagering	Queensland, South Australia, Tasmania and Northern Territory
William Hill	Wagering	Northern Territory

Source: NT Department of Business, <https://www.nt.gov.au/justice/attorney-general-and-justice/racing-commission/sports-bookmakers-and-betting-exchange-operators> (accessed 5/4/2018)

⁷² Betfair moved to the Northern Territory licensing regime in September 2016 after betting exchange platforms were legalised by the NT Government in April 2016.

RACING AND WAGERING IN AUSTRALIA

Racing

Race betting on horse and greyhound races with bookmakers and totalisators, at race courses and off-course is legal in Australia.⁷³

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 with 367 race tracks and 19,393 races held throughout Australia in the 2015-16 period.⁷⁴

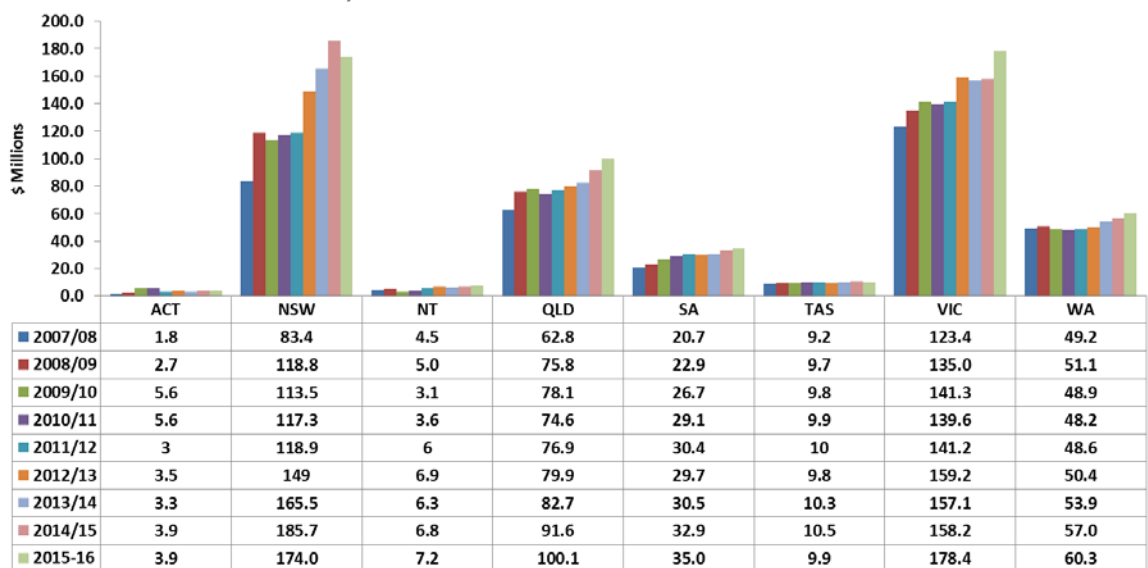
Thoroughbred Racing

Table 1-13 Number of thoroughbred race clubs, tracks, meetings and races in Australia by state/territory (2015-16)

Location	Clubs	Racetracks	Meetings	Total Races
Australian Capital Territory	1	2	24	181
New South Wales	121	116	742	5,541
Northern Territory	5	5	76	423
Queensland	115	107	693	4,540
South Australia	24	22	196	1,461
Tasmania	5	6	73	570
Victoria	69	74	550	4,409
Western Australia	35	35	297	2,268
Total	375	367	2,651	19,393

Source: Racing Australia (2017) Racing Season 2015/2016 Fact Book.

Figure 1-8 Thoroughbred prize money (\$ millions) in Australia by state/territory (2007-08 to 2015-16)



Source: Racing Australia (2008, 2009, 2010, 2011, 2012, 2013, 2013/14, 2014/15 and 2015-16) Australian Racing Fact Book.

⁷³ Government Statistician, Queensland Treasury and Trade (2016) *Australian Gambling Statistics 1997-98 to 2014-15* (32nd edition).

⁷⁴ Racing Australia (2017) *Racing Season 2015/2016 Fact Book*.

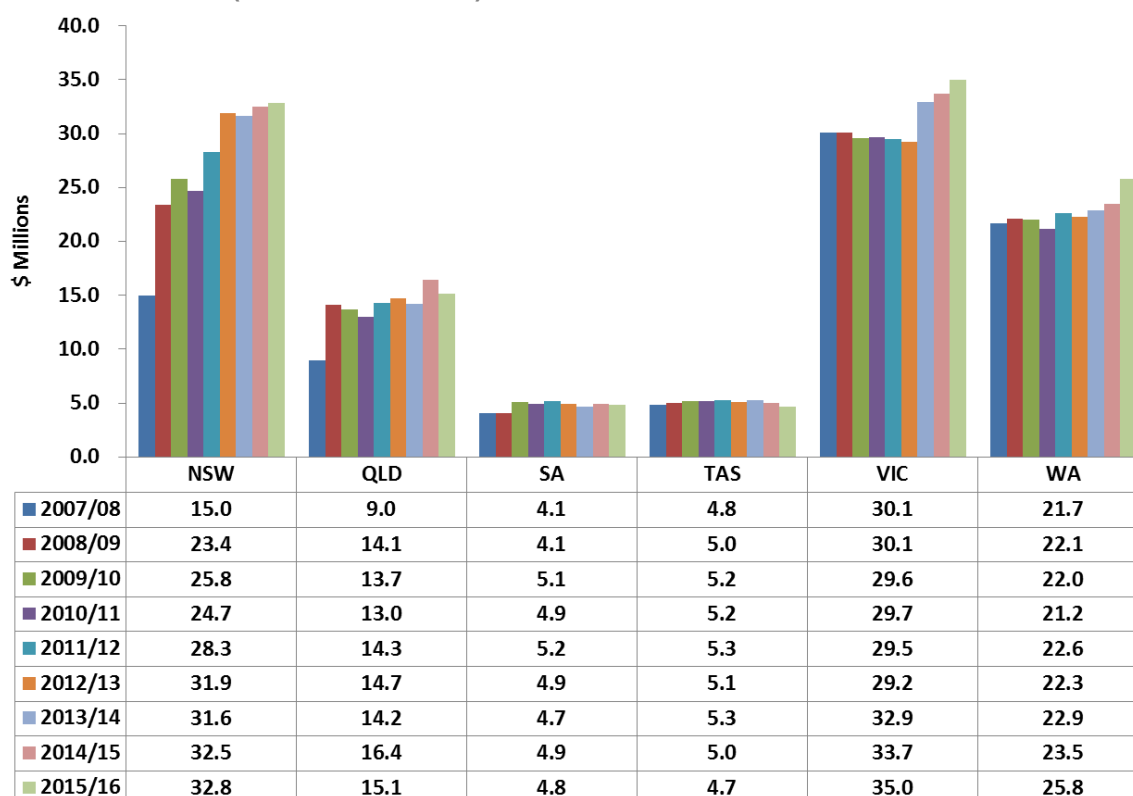
Harness Racing

Table 1-14 Number of harness racing tracks, meetings and races in Australia by state/territory (2015-16)⁷⁵

Location	Racetracks	Meetings	Races
Australian Capital Territory ⁷⁶	N/A	N/A	N/A
New South Wales	32	489	3,921
Northern Territory ⁷⁷	N/A	N/A	N/A
Queensland	7	278	2,293
South Australia	5	158	1,205
Tasmania	9	86	706
Victoria	26	456	3,782
Western Australia	13	277	2,318
Total	92	1,744	14,225

Source: *Harness Racing Australia, Annual On-Line Stakemoney Statistics, 2015/16*

Figure 1-9 Harness racing total stakemoney (\$ millions) in Australia by state/territory (2007-08 to 2015-16)⁷⁸



Source: *Harness Racing Australia, Annual On-Line Stakemoney Statistics, 2015/16*

⁷⁵ *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.

⁷⁶ No information available.

⁷⁷ No information available.

⁷⁸ Please note that during the 2007-2008 periods harness racing was at times either restricted or suspended owing to an equine Influenza outbreak.

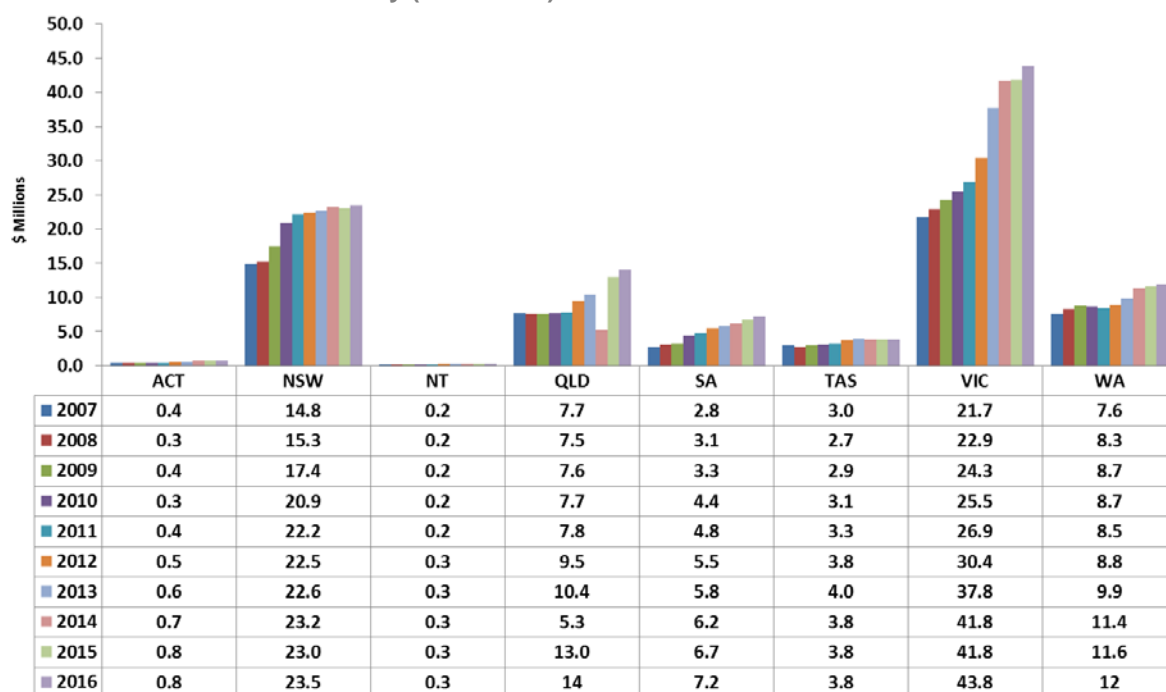
Greyhound Racing

Table 1-15 Number of greyhound racing clubs, meetings and races in Australia by state/territory (2015-16)

Location	Clubs	Meetings	Races
Australian Capital Territory ⁷⁹	1	44	484
New South Wales	33	1,208	12,319
Northern Territory ⁸⁰	1	50	293
Queensland	7	576	5,513
South Australia	6	342	3,855
Tasmania	3	157	1,592
Victoria	13	1,141	13,315
Western Australia	3	308	3,624
Total	67	3,826	40,995

Source: Greyhounds Australasia, Australasian Racing Statistics 2015-16, WAGRA Annual Report 2015-16, GRSA Annual Report 2015-2016, GRNSW Annual Report 2016, Tasracing Annual Report 2016, Racing Queensland, Annual Report for Queensland all Codes Racing Industry Board: 2015-16.

Figure 1-10 Greyhound racing stakemoney paid (\$ millions) in Australia by state/territory (2007-2016)⁸¹



Source: Greyhounds Australasia, Australasian Racing Statistics 2007-16, WAGRA Annual Report 2015-16, GRSA Annual Report 2015-2016, GRNSW Annual Report 2016, Tasracing Annual Report 2016, Racing Queensland, Annual Report for Queensland all Codes Racing Industry Board: 2015-16.

Of these three racing types thoroughbred racing is the most popular in Australia (providing an estimated 54% of wagering turnover), followed by greyhound racing (11% of wagering turnover) and harness racing (6% of wagering turnover).⁸²

⁷⁹ Figures not available for ACT 2015-16. Latest figures available from 2014-15 only and sourced from Greyhounds Australasia, Australasian Racing Statistics.

⁸⁰ Figures not available for NT 2015-16. Latest figures available from 2014-15 only and sourced from Greyhounds Australasia, Australasian Racing Statistics.

⁸¹ Figures not available for ACT and NT 2015-16. Latest figures available from 2014-15 only and sourced from Greyhounds Australasia, Australasian Racing Statistics.

⁸² Australian Racing Board (2016) *Australian Racing Fact Book: 2015-16*. Please note Sports Betting code accounts for the remaining 29% of total wagering turnover in this report.

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.⁸³

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.⁸⁴

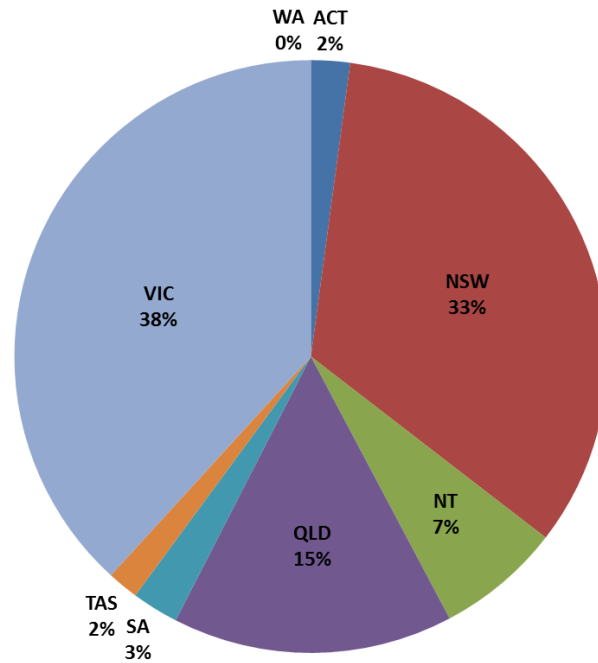
Table 1-16 Number of bookmakers in Australia (2010-11 to 2015-16)

Location	2015-16	2014-15	2013-14	2012-13	2011-12	2010-11
Australian Capital Territory	10	10	5	7	7	11
New South Wales	157	168	160	169	179	191
Northern Territory	32	28	30	38	46	46
Queensland	72	72	79	75	99	107
South Australia	12	12	11	11	14	28
Tasmania	8	N/A	N/A	N/A	N/A	15
Victoria	180	176	178	178	171	124
Western Australia	N/A	N/A	N/A	N/A	N/A	N/A
Total	471	466	463	478	516	522

Source: Australian Racing Board (2011, 2012, 2013, 2014, 2015 and 2016), Racing Australia (2016) Fact Book: Racing Season 2015/2016.

⁸³ Government Statistician, Queensland Treasury and Trade (2014) *Australian Gambling Statistics 1997-98 to 2014-15 (32nd edition)*.

⁸⁴ Government Statistician, Queensland Treasury and Trade (2014) *Australian Gambling Statistics 1997-98 to 2014-15 (32nd edition)*.

Figure 1-11 Estimated distribution of bookmakers in Australia (2015-16)

Source: *Racing Australia (2016), Fact Book: Racing Season 2015/2016.*

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.⁸⁵

Online sports-betting is an area of significant growth in the Australian gambling environment which has experienced “an ongoing shift of wagering spend from traditional offline betting channels (i.e. retail or TAB outlets, on-course bookmakers and with bookmakers over the phone) to online channels (internet, mobile, tablet)”.⁸⁶

A number of online sports betting providers in Australia are based in the Northern Territory. 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 a number of sports bookmakers in Darwin and Alice Springs with corporate bookmakers allowed to trade 24/7.

⁸⁵ Government Statistician, Queensland Treasury and Trade (2014) *Australian Gambling Statistics 1997-98 to 2014-15 (32nd edition)*.

⁸⁶ Australian Wagering Council (AWC) <http://australianwageringcouncil.com/policy-representation/industry-statistics>

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.⁸⁷

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.

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

The two major wagering operators in Australia are Tabcorp (which has a licence to operate the totalisators in the ACT, NSW and Victoria) and Tatts Group (through UBET - which operates the Queensland, South Australian, Northern Territory and Tasmanian TABs).

In Western Australia the TAB is operated by a government-owned organisation.⁸⁸

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.⁸⁹

Table 1-17 Estimated number of TAB retail outlets (land-based) in Australia by state/territory (2015-16)

Location	Total
Australian Capital Territory	48
New South Wales	2,054
Northern Territory	57
Queensland	842
South Australia	367
Tasmania	142
Victoria	732
Western Australia	320 ⁹⁰
Total	4,562

Source: Tabcorp Holdings Limited, Tatts Group Limited, RWWA.

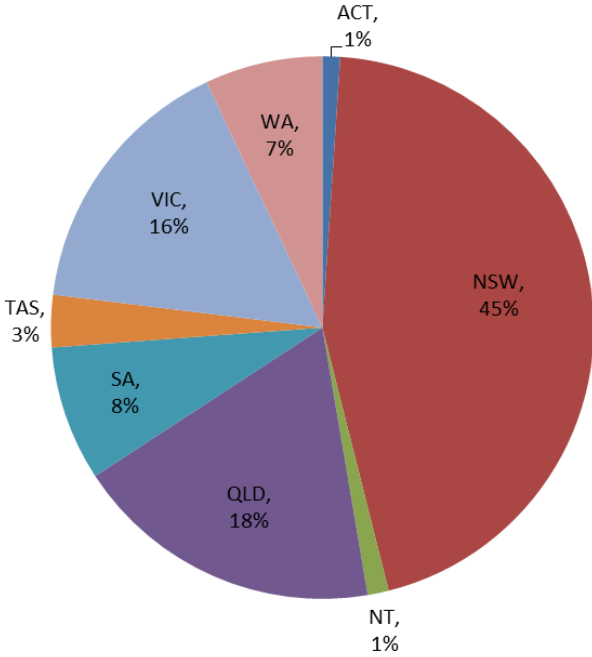
⁸⁷ Government Statistician, Queensland Treasury and Trade (2014) *Australian Gambling Statistics 1997-98 to 2014-15 (32nd edition)*.

⁸⁸ 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.

⁸⁹ Tabcorp Holdings Limited (2012) *Victorian TAB enters into new pooling arrangements with RWWA*, Media Release 3 August 2012.

⁹⁰ RWWA (2018), <http://www.rwwa.com.au/home/about/about-us.html> (accessed 31/5/2018).

Figure 1-12 Estimated distribution of TAB outlets (land-based) in Australia (2015-16)



Source: Tabcorp Holdings Limited, Tatts Group Limited, RWWA.

LICENCE AND EXCLUSIVITY ARRANGEMENTS

Casinos

Table 1-18 Casino licence/exclusivity arrangements in Australia by state/territory

Location	Casino	Duration
Australian Capital Territory	Casino Canberra	Established in 1992. A 99-year licence. Exclusivity expired in 2012.
New South Wales ⁹¹	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.
Northern Territory	SKYCITY Darwin	Established in 1979. The licence term was set in 2006 for a 20 year period until 2026 subject to extension for a further 5 years. Exclusivity until 2031 ⁹² .
	Lasseters Casino	Established in 1982. Southern NT division exclusivity until 2018.
Queensland ⁹³	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. ⁹⁴
	The Star Gold Coast	Established in 1985. Licence awarded in perpetuity. A 10 year regional casino gaming exclusivity agreement which expired in 1996.
South Australia	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). ⁹⁵
Tasmania	Country Club Casino	Established in 1973 (Wrest Point) and 1982 (Country Club). The Deed of Agreement between the Crown and Federal Hotels Pty Ltd 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).
	Wrest Point Casino	
Victoria	Crown Melbourne	Established in 1994. Licensed until 2050.
Western Australia	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.

Source: Productivity Commission (2010) *Gambling, Canberra - with updates by the AGC*.

⁹¹ In November 2013 the NSW Government announced that another casino will operate from 2019 (after the exclusivity period for 'The Star' has expired). The second casino will operate at Barangaroo from November 2019 but will provide VIP table games only at a proposed \$1.3 billion hotel complex run by Crown Resorts Ltd.

⁹² SKYCITY Entertainment Group Ltd (2013) *Full Year Results Presentation*.

⁹³ 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.

⁹⁴ *Cairns Casino Agreement Act 1993* (QLD)

⁹⁵ SKYCITY Entertainment Group (2011) *Annual Report* and SKYCITY Entertainment Group Ltd (2013) *Full Year Results Presentation*.

Keno

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

Location	Licensee	Duration
Australian Capital Territory	ACTTAB (Tabcorp Holdings Ltd)	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 was granted approval to offer Keno until 2064.
New South Wales	ClubKeno Holdings Pty Ltd (ClubsNSW) and Keno (NSW) Pty Ltd (Tabcorp Holdings Ltd)	ClubKeno Holdings Pty Limited (a subsidiary of ClubsNSW) and Keno (NSW) Pty Limited (a subsidiary of Tabcorp Holdings), as joint licensees, hold the current licence for the game of Keno in NSW, which expires in 2050. ⁹⁶
Northern Territory	SKYCITY Darwin	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.
Queensland	Keno (QLD) Pty Ltd (Tabcorp Holdings Ltd)	Licensed until 2047 (extended from 2022 in 2013). ⁹⁷
South Australia	Tatts Lotteries SA Pty Ltd (Tatts Group)	Keno in SA is operated by SA Lotteries. From December 2012 Tatts has exclusive management rights to SA Lotteries for a 40 year period.
Tasmania	Federal Group	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, 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. ⁹⁸
Victoria	Tabcorp Investments No. 5 (Tabcorp Holdings Ltd)	Licence and exclusivity for 10 years commencing in April 2012 until 2022 ⁹⁹
Western Australia	Crown Perth	Operates in casino only.

Sources: <https://nt.gov.au/industry/gambling/casinos> Tabcorp Holdings Ltd (2016) Annual Report 2016, Tasmanian Department of Treasury and Finance, Tabcorp Annual Report 2016, with updates by the AGC.

⁹⁶ NSW Government (2016), *NSW Keno licence extended to 2050: Media release*, 12 February 2016.

⁹⁷ Tabcorp (2013), *Tabcorp's Queensland Keno licence to be extended to 2017: Media release*, 7 April 2013.

⁹⁸ http://www.premier.tas.gov.au/releases/ministerial_statement_on_gaming (accessed 30/5/2018).

⁹⁹ Victorian Commission for Gambling and Liquor Regulation, <https://www.vcqlr.vic.gov.au/gambling/keno/about-keno> (accessed 30/5/2018).

Lotteries

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

Location	Licensee	Duration
Australian Capital Territory	Tatts Group – NSW Lotteries	Non-exclusive lottery licence.
New South Wales	Tatts Group – NSW Lotteries	Exclusive lottery licence until 2050.
Northern Territory	Tatts Group – Tatts NT Lotteries	Non-exclusive lottery licence until 2032.
Queensland	Tatts Group – Golden Casket	Non-exclusive lottery license until 2072.
South Australia	Tatts Group – Tatts Lotteries SA ¹⁰⁰	Exclusive <i>Master Agent Agreement</i> until 2052.
Tasmania	Tatts Group – Tattersall’s Sweeps	Non-exclusive <i>Foreign Games Permit</i> until 2020.
Victoria	Tatts Group – Tattersall’s Sweeps	Exclusive lottery licence until 2028. ¹⁰¹
Western Australia	LotteryWest	No fixed term – government owned and operated.

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

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.

¹⁰⁰ The Tatts Group subsidiary Tatts Lotteries SA entered into an agreement with the South Australian Government to exclusively manage the lottery games conducted by the Lotteries Commission of South Australia.

¹⁰¹ Tatts Group (2017) *Annual Report 2016-17*.

Wagering

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

Location	Licensee	Duration
Australian Capital Territory	ACTTAB (Tabcorp Holdings Ltd)	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. The ACT Government issued Tabcorp a 50 year exclusive totalisator licence (until 2064) and a sports bookmaking licence for an initial term of 15 years (2029) with further rolling extensions to a total term of 50 years (2064). ¹⁰²
New South Wales	Tabcorp Holdings Ltd	Licensed until March 2097, exclusivity extended by agreement in 2013 to June 2033.
Northern Territory	UBET NT Pty Ltd	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 20-year licence is held by UBET NT Pty Ltd - part of the Tatts Group. It was awarded in 2015 and expires in 2035. The licence gives UBET NT exclusive rights to operate a totalisator in the Territory and conduct retail betting on racing and sports through the totalisator.
Queensland	TattsBet/UBET ¹⁰³	Wagering and sports betting licence to 30 June 2098, exclusivity until 30 June 2044.
South Australia	TattsBet/UBET	Licensed for wagering and sports-betting until 2100 with exclusivity to 2032. ¹⁰⁴
Tasmania	TOTE Tasmania (Tatts) ¹⁰⁵	Licensed for 50 years, with an additional 49 years (to 2111). Exclusivity until 26 March 2027. ¹⁰⁶
Victoria	Tabcorp Holdings Ltd	Licence/exclusivity until 2024 commencing August 2012. (At the discretion of the responsible minister, the licence may be extended for a further two years).
Western Australia	WA TAB	Perpetual exclusivity

Source: Tatts Group Ltd 2016 <http://www.tattsgroup.com/investors/shareholders/investor-fact-sheet>
 Tabcorp Holdings Ltd (2016) Annual Report 2016, <https://nt.gov.au/industry/gambling/nt-totalisator-licence>

¹⁰² Tabcorp Holdings Ltd (2014) *Tabcorp to acquire ACTTAB*, Media release 30 July 2014.

¹⁰³ On October 12 2006 UNiTAB Limited became part of Tattersall's Limited as a result of a merger of both companies. UNiTAB is now known as UBET.

¹⁰⁴ Tabcorp Holdings Ltd, (2018) *Tabcorp welcomes court approval of Tatts scheme of arrangement*. Media release.

¹⁰⁵ <http://www.theaustralian.com.au/business/mergers-acquisitions/tatts-buys-tote-tasmania/story-fn91vdzj-1226211735773>

¹⁰⁶ <http://au.finance.yahoo.com/news/Tatts-buys-Tasmanian-TAB-103m-aap-442179975.html>