



1. Introduction
2. Participation
3. Turnover and losses
4. Problem gambling
5. Benefits and costs
6. Legislative reforms
7. Enforcement action
8. Other government initiatives
9. Clubs and hotel policies
10. Critics of current policy
11. Research reports
12. Conclusion

Gambling: an update

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1. Introduction

The question of whether governments and the gambling industry are doing enough to address the harms of problem gambling is one that continues to be debated in Australia and overseas.¹ This paper presents the latest gambling statistics and outlines key developments in NSW in the past five years in relation to harm minimisation.² These include legislative reforms, enforcement action, other government initiatives, and industry policies. Recent criticisms of government policy, and research reports relating to harm minimisation, are also discussed.

2. Participation

The [2019 NSW Gambling Survey](#) engaged with 10,012 adults living in NSW who were randomly selected. The survey found:

- Just over half (53%) of the adults had participated in at least one gambling activity in the last 12 months (down from 65% in 2011);
- Buying lottery tickets was the most prevalent form of gambling (37%; down from 41%), followed by electronic gaming machines (16%; down from 27%), and betting on horse or greyhound races (13%; down from 24%);
- Adults who participated in sports betting (e.g. football, cricket) declined from 7% in 2011 to 6% in 2019; and
- Almost one in five (19%) adults who had gambled in the last 12 months participated in online gambling.³

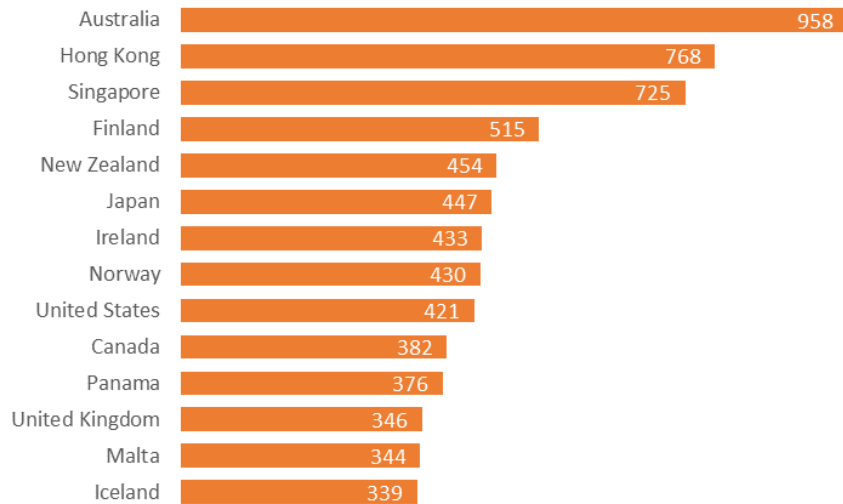
3. Turnover and losses⁴

Gambling turnover and losses

Australia: In 2017-18, total gambling turnover (i.e. the total amount wagered) in Australia was \$218.9 billion.⁵ Gaming was the largest category of gambling turnover (\$181.4 billion), with racing second (\$25.8 billion) and sports betting the smallest category (\$11.6 billion). Gaming machines was the largest sub-category of gambling turnover (\$149.5 billion).

Australia's total gambling losses were \$24.9 billion.⁶ Per capita gambling losses were \$1,292.⁷ According to a 2018 media article, which cited analysis by H2 Gambling Capital, Australia has the highest per capita gambling losses in the world; Hong Kong was second and Singapore third (see Figure 1).

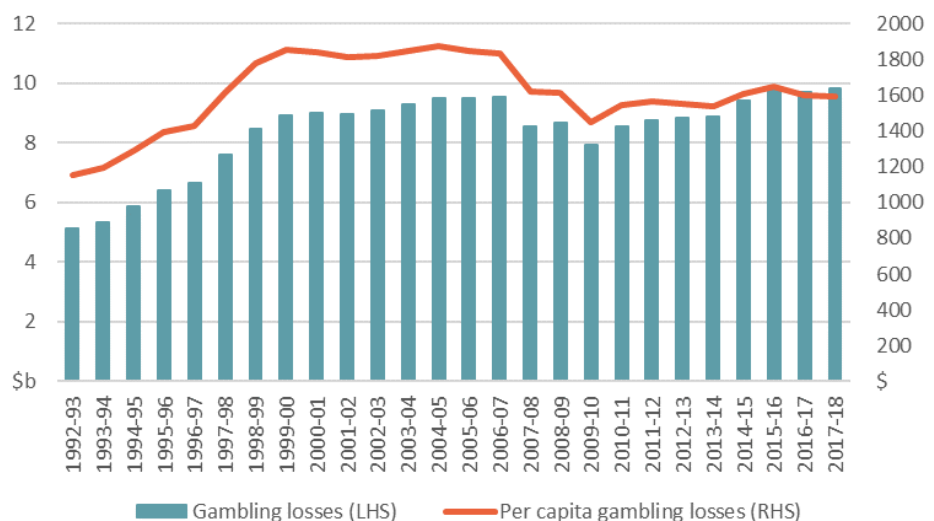
Figure 1: Countries with highest per capita gambling losses (\$US), 2017⁸



New South Wales: In 2017-18, NSW had total gambling turnover of \$92.9 billion. Gaming was the largest category of gambling turnover (\$85.2 billion), followed by racing (\$6.3 billion) and then sports betting (\$1.3 billion). Gaming machines was the largest sub-category of gaming turnover (\$83.2 billion).

In 2017-18, NSW had total gambling losses of \$9.8 billion, with gaming machines the largest sub-category of gambling losses (\$6.4 billion), followed by the casino (\$1.6 billion) and racing TAB (\$961 million) subcategories.⁹ NSW had the highest gambling losses of all States and Territories; the next highest was Victoria with \$5.8 billion.¹⁰ NSW had the second highest gambling losses per capita (\$1,594), with Northern Territory having the highest (\$11,940), and Victoria having the third highest (\$1,163).¹¹ Trends in real gambling losses (i.e. adjusted for inflation) are shown below.

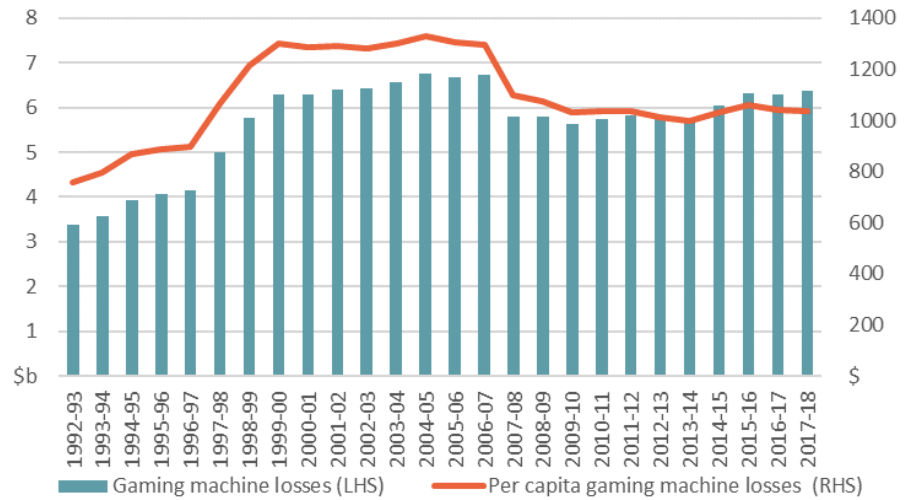
Figure 2: NSW real gambling losses, 1992-93 to 2017-18¹²



Gaming machine losses

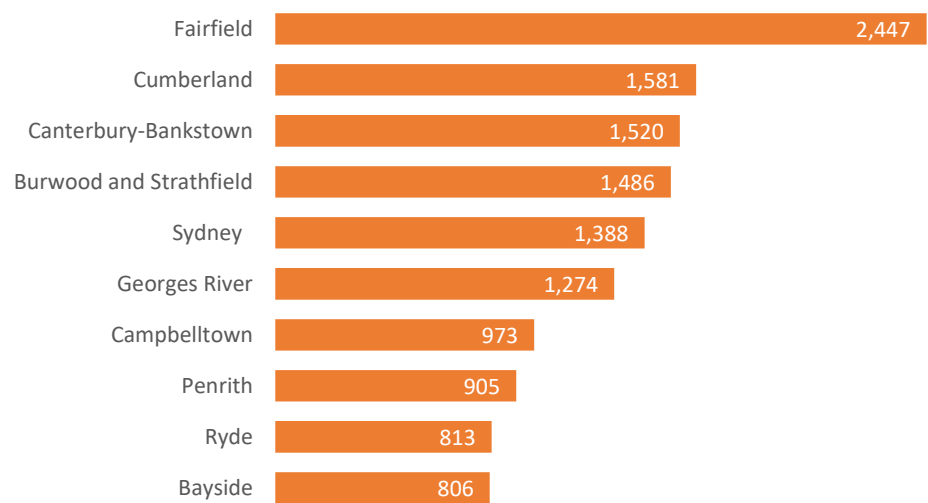
In 2017-18, NSW had the highest gaming machine losses of all States and Territories (\$6.4 billion); the next highest was Victoria (\$2.7 billion).¹³ In NSW, per capita gaming machine losses was \$1,035, which was also the highest per capita losses in Australia; the next highest was Queensland (\$624).¹⁴ Trends in real gaming machine losses (i.e. adjusted for inflation) in NSW are shown in the chart below.

Figure 3: NSW real gaming machine losses, 1992-93 to 2017-18¹⁵



NSW 2018-19 data shows that clubs had total gaming machine net profits of \$4 billion, while hotels had \$2.6 billion.¹⁶ The Fairfield Local Government Area (LGA) had the highest per capita gaming machine profits for clubs and hotels combined in Greater Sydney (\$2,447). The average per capita profits for LGAs in Greater Sydney was \$826.

Figure 4: LGAs in Greater Sydney with highest per capita gaming machine net profits in clubs and hotels (\$), 2018-19¹⁷



Gaming machine numbers

In 2017-18, Australia had a total of 194,322 gaming machines (down from 199,002 in 2001-02).¹⁸ NSW had 93,618 gaming machines (down from 102,958 in 2001-02), which was by far the most gaming machines of any State or Territory; Queensland was the next highest with 46,224 gaming machines, followed by Victoria with 29,012.

According to the Gaming Technologies Association (GTA), the representative body for Australian gaming technology producers, in 2018 Australia had the fifth highest number of gaming machines (196,301) of all countries.¹⁹ The Australian total represented 2.6% of the world's gaming machines.²⁰ NSW had the eighth most gaming machines (93,620) of all jurisdictions (i.e. all countries plus States in Australia, the United States and Canada); and the second most of all States in Australia, the United States and Canada, after Nevada (164,413) where Las Vegas is situated.²¹

A 2017 Australia Institute report observed that most gaming machines in Australia are poker machines, which are typically high intensity machines, meaning gamblers can lose large amounts of money very quickly.²² In addition, most gaming machines in Australia are located in pubs and clubs rather than in dedicated gambling venues like casinos and slot halls.²³ Based on GTA data, the report calculated that Australia had 18% of the world's poker machines, and 76% of the world's pub and club poker machines.²⁴

In 2019, NSW clubs had 68,808 gaming machines across 1,085 premises (an average of 63 machines per club) while NSW hotels operated 22,612 gaming machines in 1,386 premises (an average of 16 machines per hotel).²⁵

Gambling tax revenue

In 2017-18, the NSW government received \$2.3 billion in tax revenue from gambling (in real terms, up from \$1.8 billion in 2000-01).²⁶ This represented 7.4% of total State tax revenue and 2.9% of total State revenue.²⁷

4. Problem gambling

Many people enjoy gambling. However, for a number of participants it can have harmful consequences. Ford and Håkansson explain that problem gambling is comprised of a spectrum:

... consisting of multiple levels of gambling problems, from at-risk gambling to gambling disorders...The actual clinical diagnosis, recognized as pathological gambling, is defined by the [World Health Organisation] as consisting of "frequent, repeated episodes of gambling that dominate the patient's life to the detriment of social, occupational, material, and family values and commitments". This diagnosis also corresponds to the term 'gambling disorder' which is classified in the Diagnostic and Statistical Manual of Mental Disorders (DSM-5)...Clinical characteristics of problem gambling include legal problems, reduced quality of life, impaired psychological functioning, and increased rates of bankruptcy, divorce and incarceration.²⁸

The [2019 NSW Gambling Survey](#) measured problem gambling using the Problem Gambling Severity Index (PGSI).²⁹ Based on their PGSI scores, gamblers were split into one of four categories: problem gamblers, moderate-risk gamblers, low-risk gamblers, and non-problem gamblers. As shown in

Table 1, the survey found that 1% of adults were problem gamblers, a slight but not statistically significant increase from the 2011 rate of 0.8%.³⁰ A further 2.8% were moderate risk gamblers (down from 3.7%) and 6.6% were low risk gamblers (down from 8.4%).³¹ Based on June 2019 NSW adult population data, the 1% rate for problem gamblers is equal to 63,163 people; and the 2.8% rate for moderate risk gamblers is equal to 176,857 people.³²

Table 1: PGSI risk categories, NSW adult population: 2019 and 2011³³

| Risk category (PGSI score) | Prevalence | | Interpretation |
|-------------------------------|------------|-------|---|
| | 2019 | 2011 | |
| Problem (8+) | 1.0% | 0.8% | Those who have experienced adverse consequences as a result of their gambling and who may have lost control of their gambling behaviour |
| Moderate risk (3-7) | 2.8% | 3.7% | This group may or may not have experienced significant adverse consequences from gambling |
| Low risk (1-2) | 6.6% | 8.4% | Are likely to have experienced only minor adverse consequences from gambling, if any. |
| Non-problem (0) | 42.9% | 52.8% | They will be unlikely to have experienced severe adverse consequences from gambling. |
| Non-gamblers (N/A) | 46.7% | 35.1% | Have not gambled in last 12 months |

The survey report also presented prevalence rates by risk category for gamblers (those who had gambled in the last 12 months) and, separately, regular gamblers (those who had gambled at least once a week other than lottery products or scratchies tickets). For example, 1.9% of all gamblers were problem gamblers, and 13.4% of regular gamblers were problem gamblers. Similarly, 80% of all gamblers were non-problem gamblers.

Table 2: Risk categories, gamblers and regular gamblers: 2019³⁴

| Risk Category | Population | Gamblers | Regular gamblers |
|---------------|------------|----------|------------------|
| Problem | 1.0% | 1.9% | 13.4% |
| Moderate risk | 2.8% | 5.2% | 18.5% |
| Low risk | 6.6% | 12.4% | 23.9% |
| Non-problem | 42.9% | 80.4% | 44.0% |

Other findings from the 2019 survey included:

- Based on self-reported gambling spend, problem gamblers account for 36.7% of gambling expenditure, with moderate-risk gamblers accounting for a further 14.5%;
- Younger adult gamblers (aged 18 to 24) were most likely to be moderate-risk and problem gamblers (14.9%) compared with 7.2% of NSW gamblers overall;

- Moderate-risk and problem gambling was negatively associated with both level of education and lower personal annual income, and was higher among the unemployed (28.7%), and full-time students (15.5%);
- In total, 6.3% of gamblers reported at least one form of harm resulting from their gambling (Note: The harms selected for the survey were mostly moderate and severe harms). These included feeling depressed (2.9%), and distress about their gambling (2.7%); and
- Electronic Gaming Machine (EGM) play represents the greatest risk for problems, being both far more prevalent, and having almost double the per person impact than the next harmful gambling activity (online poker games).³⁵

In contrast to the 2011 survey, the 2019 NSW Gambling Survey did not compare the rates of problem gambling in NSW with other Australian or international jurisdictions.³⁶ A 2017 Tasmanian report compared the results of recent gambling surveys in several States and Territories that also used the PGSI.³⁷ The problem gambling rates ranged from 0.4% in the ACT (2015) to 0.8% in Victoria (2015); and the moderate risk rates ranged from 1.1% in the ACT (2015) to 2.9% in the Northern Territory (2017). However, the report noted that these comparisons “should be interpreted with caution” because of methodological variations between surveys.³⁸ The same issue arises when trying to compare problem gambling rates across countries.³⁹

5. Benefits and costs

In its 2010 report, the Productivity Commission estimated a net social benefit from gambling in Australia between \$3.7 billion and \$11.1 billion.⁴⁰ It estimated that “the benefits from tax revenue and enjoyment of gambling for recreational gamblers ranged between \$12.1 and \$15.8 billion”; and “the costs to problem gamblers ranged between \$4.7 and \$8.4 billion”.⁴¹ It said that “the net benefits could be much larger if governments reduced the costs through effective prevention and harm minimisation policies”.⁴² Recent reports quantifying the benefits and costs of gambling are noted below.

A 2018 Gaming Technologies Association [report](#) estimated the economic contribution of electronic gaming machines to the Australian economy. In 2016-17:

- gaming machines contributed \$8.32 billion to the Australian economy in value added
- direct employment across all industries (including manufacturing) is 46 660 people, which is equivalent to 24 150 full time jobs
- exports were \$284 million from the use of gaming machines by international visitors and the sale of machines overseas
- tax revenue for state and commonwealth governments is \$5.5 billion.⁴³

The report noted that these results “do not include any of the economy wide economic impacts such as indirect employment, social costs associated with problem gambling, or consumer surplus benefits”.⁴⁴

Gambling is an important source of revenue for registered clubs in NSW. A 2016 [report](#) published by Clubs NSW reported on the economic and social impact of the clubs industry. It found that in 2015:

- The clubs industry contributed an estimated \$3.7 billion (0.7% of GSP) to the NSW economy
- The clubs industry contributed an estimated \$1.4 billion in Commonwealth and State taxes.
- The value of registered clubs' social contribution to NSW is a further \$1.3 billion.⁴⁵

A 2017 [report](#) published by the Victorian Responsible Gambling Foundation estimated the social cost of gambling to Victoria. In 2014-15:

When considering costs arising from [problem gamblers] only, and adjusting for inflation, we determined the cost of gambling to be \$2.4 billion, which is quite similar to prior estimates. However, we also determined costs of \$2.4 billion and \$1.9 billion arising from lower risk categories [low risk and moderate risk] as well as \$0.3 billion in non-gambler specific costs. When these are included, the present analysis arrives at a total cost of \$7 billion – substantially higher than previous estimates.⁴⁶

This suggests that problem gamblers accounted for 36% of the \$7 billion total social costs. The total costs were comprised of:

- \$2.2 billion – family and relationship problems
- \$1.6 billion – emotional and psychological issues, including distress, depression, suicide and violence
- \$1.3 billion – financial losses through, for example, excessive spending on gambling, bankruptcy and illegal offshore gambling
- \$1.1 billion – costs to the Victorian government, such as research, regulation, and professional support services, including mental health and homelessness services
- \$600 million – lost productivity and other work-related costs
- \$100 million – costs of crime, including to businesses and the justice system.⁴⁷

6. Legislative reforms

Most forms of gambling are regulated by State law, with Commonwealth laws covering online gambling.⁴⁸ A range of harm minimisation practices are legally required in NSW, including:

- [Responsible Conduct of Gambling](#) means venue staff have responsibilities when operating gaming machines and undertake mandatory training. It helps to ensure compliance with the law, reduce gambling related issues and to promote safety (harm minimisation) in venues where there are gaming machines.
- [Self Exclusion](#) - a voluntary program that allows people with a gambling problem to ban themselves from the gaming areas of hotels, clubs and the casino. People can also nominate an entire hotel or club for self exclusion.
- [A range of gaming machine harm minimisation initiatives](#) such as mandatory shutdowns on machines, cap on the number of machines in NSW, forfeiture scheme and signage in venues.⁴⁹

In June 2015, the NSW Government:

- reduced the gaming machine cash input limit from \$10,000 to \$7,500;⁵⁰ and
- increased the minimum period of self-exclusion from a hotel or club from 3 months to 6 months.⁵¹

However, at the same time, it:

- increased the amount above which prize money must be paid by cheque or electronic funds transfer from \$2,000 to \$5,000; and
- increased the amount that can be held in a player account or stored on a Smartcard from \$200 (\$1,000 with special approval) to \$5,000.⁵²

A motion by John Kaye to disallow the latter two changes was defeated.⁵³

In November 2015, the NSW Government introduced a new offence of publishing gambling advertising in relation to a sporting fixture less than four hours long while the fixture is in progress.⁵⁴ This offence had a maximum penalty of \$5,500. Advertisements published on the internet or in premises which people attend specifically to gamble (e.g. a hotel, club) are exempt.

In March 2018, the NSW Government introduced a liquor and gaming reform package.⁵⁵ The Minister for Racing referred to the changes as “the most significant set of reforms to New South Wales gaming regulation in more than 10 years”.⁵⁶ The package included:

- Reforming the [Local Impact Assessment scheme](#) that assesses the impact of introducing additional gaming machines into a local community, including capping the number of machines in high-risk communities such as Fairfield;⁵⁷
- Introducing a leasing scheme for gaming machines held by small hotels and clubs, with the intention of making it easier for these hotels and clubs to “go pokie free”;⁵⁸ and
- Increasing penalties for publishing prohibited gambling advertising, including offering an inducement to gamble (other than to existing betting account holders), from \$5,500 to \$55,000 for corporations and from \$5,500 to \$11,000 for individuals.⁵⁹

The Opposition supported the Bills, with the Shadow Minister for Gaming and Racing, Michael Daley, stating that the Bills “are not ground-breaking or huge reforming legislation; they are a tidy up”.⁶⁰ The Christian Democratic Party had some reservations about the Bills but did not oppose them.⁶¹ The Greens opposed the Bills, with Justin Field arguing that they would result in “greater harm, more machines in some areas and a slowdown in the reduction of poker machines as it is occurring under current laws”.⁶²

In June 2018, Liquor and Gaming NSW published [guidelines](#) on its compliance approach to gambling advertising and inducements to gamble.⁶³ An example of a prohibited advertisement was an offer of free or bonus bets (e.g. “new customer sign-up bonus – deposit \$50 and bet with \$200”).⁶⁴ With respect to the racing industry, the guidelines noted:

The new prohibitions against inducements are not intended to be enforced by L&G NSW in relation to advertisements published or communicated on existing platforms which exclusively provide racing content.⁶⁵

In August 2019 the NSW Government introduced reforms to (i) broaden the definition of “inducement” to address a recent court decision; and (ii) to implement stage one of the [National Consumer Protection Framework for Online Wagering](#).⁶⁶ The stage one reforms included:

- prohibiting direct marketing to holders of betting accounts without their express consent;
- prohibiting offering inducements to open a betting account, to invite others to open a betting account or not to close a betting account;
- requiring betting service providers to allow customers to set deposit limits to help them manage their gambling activity; and
- requiring betting service providers to give customers a simple and easy way of closing their betting account.

Due to amendments to the bill successfully moved by the NSW Greens, the maximum penalties for the offences were doubled from \$55,000 to \$110,000 for corporations and from \$5,500 to \$11,000 for individuals.⁶⁷

7. Enforcement action

Recent examples of actual or alleged improper practices in the gambling industry in NSW, and related enforcement action, are noted below.

Illawarra Steelers: In October 2018, the Independent Liquor and Gaming Authority (ILGA) fined the Illawarra Steelers Club \$100,000 for breaching provisions of the *Liquor Act* and *Gaming Machines Regulation* by offering free alcohol and disguising EFTPOS transactions as purchases in order to supply cash for poker machines.⁶⁸ A media article noted that this fine was the biggest imposed on a registered club in NSW.⁶⁹ The ILGA also banned the club’s former secretary from the clubs industry for life for a range of offences.

ALH Group: In February 2018, Andrew Wilkie alleged in Federal Parliament that ALH Group (majority owned by Woolworths), which has around 400 poker machine venues, “spies on its poker machine customers without their knowledge, keeps a secret database of personal information and uses that information to encourage increased gambling”.⁷⁰

In August 2018, ALH Group said that an internal investigation found that this practice was operating in a limited number of venues in Queensland and certain aspects of the practice were operating in two venues in NSW.⁷¹ It also found evidence that, at some venues in Queensland, free drinks were given to high value customers to encourage further gaming activity. ALH said it committed to disciplinary action, enhanced training, a ban on service of free alcohol in gaming areas, and promotion of voluntary pre-commitment.

In June 2019, Liquor and Gaming NSW said that following “a comprehensive investigation into ALH venues which included inspections of more than 50 NSW hotels”, it had lodged a disciplinary complaint with the ILGA alleging that two ALH-run hotels on the North Coast illegally gave free alcohol to gaming machine players to keep them gambling.⁷²

Dee Why RSL: In July 2018, the media reported the case of Gary Van Duinen, a problem gambler who died by suicide after an alleged 13-hour stint of playing the pokies at clubs on the Northern Beaches.⁷³ Mr Van Duinen's mother was critical of Dee Why RSL club for not helping her son stop gambling and encouraging his habit. The article stated:

It made him a member of its "Ambassador" program for big spenders, allowing him access to a special car park and red carpet entrance, sidestepping the sign-in process at the front door. He accumulated loyalty points for his heavy gambling expenditures, which he spent on drinks that staff brought to him at the machines.

When he wanted cigarettes a staff member would leave the club to buy him his preferred brand at a nearby shop and deliver them to him at the machine.

He was invited to bring friends to an annual slap-up seafood "thank you" dinner for heavy gamblers.

The article noted a response from the club's chief executive:

Mr Easterby said that it was not lawful for the club to "intervene with or ask gaming patrons to curtail their activity at the request of third parties, even family members. Clubs NSW has in the past advocated for the self-exclusion scheme to be extended to include third parties and Dee Why RSL would support that change."

He did not address questions about the claims that staff fetched drinks and cigarettes for gamblers.

In May 2019, Liquor and Gaming NSW lodged a disciplinary complaint with the ILGA alleging that Dee Why RSL encouraged Mr Van Duinen to misuse and abuse gaming machines.⁷⁴ The complaint has not yet been determined.

Several online betting providers: Since March 2019, there have been several convictions of online betting service providers for offering inducements to gamble, with fines ranging from \$2,500 to \$207,500.⁷⁵

Crown Sydney Gaming: In July 2019, the media reported allegations that the Crown Casino in Melbourne had business ties to organisations linked to Chinese organised crime.⁷⁶ In August 2019, the ILGA announced that it would be conducting an inquiry into the Barangaroo restricted gaming facility granted to Crown Sydney Gaming Pty Limited.⁷⁷

8. Other government initiatives

In 2017, the NSW Government established an [Office of Responsible Gambling](#), which is part of the Better Regulation Division of the Department of Customer Service. The Office "leads the development of responsible gambling strategy and public policy advice to the NSW Government and supports and manages the Responsible Gambling Fund, Clubgrants Category 3 and Community Development Fund".⁷⁸

In October 2018, the Office released its [Strategic Plan 2018-2021](#). The plan's vision is "NSW working towards zero gambling harm". The plan's goals relate to research, partnerships, education and awareness, support services, and technology and innovation.

In the lead up to the 2019 NSW election, the NSW Liberal/Nationals and Clubs NSW entered into a new [Memorandum of Understanding](#) (MOU). In relation to harm minimisation, the MOU states that a Liberal/National Government would work with clubs to:

- Introduce a new range of gambling harm minimisation measures including more effective exclusion schemes including third-party and prize and jackpot forfeitures for excluded gamblers;
- Reducing the cash input limit from \$7500 to \$5000;
- Introduce advanced staff training programs in responsible gambling;
- Continue roll-out of venue-based voluntary pre-commitment.⁷⁹

In the 2019-20 budget the NSW Government allocated \$35 million “to support responsible gambling and reduce problem gambling”.⁸⁰ This included:

...\$17.6 million to Gambling Help services, including phone, online and 55 face-to-face counselling services in more than 250 rural, regional and metro locations throughout New South Wales; \$5.3 million to education and awareness programs to encourage responsible gambling, assist the people of New South Wales to make informed choices by understanding the risks of harm and build resilience in the community; and \$7.4 million to develop technology, innovation and partnerships in the areas of harm minimisation, early intervention and treatment.⁸¹

9. Clubs and hotel policies

In 2019, Clubs NSW released its [Responsible Gambling Strategy 2019-21](#). The Strategy lists the following positive outcomes from the implementation of the 2012 Clubs Australia responsible gambling policy:

- 6000 patrons assisted through Multi-Venue Self-Exclusion (MVSE)
- 45% of self-exclusion through qualified counselling services
- 2900 venues participating in MVSE
- 5000 students visited by ClubSAFE Ambassador, Nathan Hindmarsh
- 274,000 club members with access to a Salvation Army Club Chaplain
- \$1 million in grants for responsible gambling research
- 30,000 EGMs connected to voluntary pre-commitment systems
- 25% of club EGMs covered under ClubSAFE Premium.⁸²

The Strategy lists future commitments in seven areas:

1. *Policies and procedures*: e.g. developing best practice guidelines in key areas including loyalty programs.
2. *Informed choice*: e.g. using digital technology to improve access to consumer information on gaming machines.
3. *Tools*: e.g. providing clubs patrons with access to a range of online responsible gambling tools and resources.
4. *Customer service*: e.g. providing advanced staff training programs that will improve interactions with at-risk patrons.
5. *Help and support*: e.g. improving self-exclusions access, breach detection and ongoing support mechanisms.

6. *Research and education*: e.g. providing ongoing funding for independent research into gambling harm minimisation.
7. *Compliance*: e.g. providing independent compliance audits of clubs through ClubSAFE Premium.

In its 2014 submission to the Select Committee, the Australian Hotels Association (NSW) outlined a Responsible Gambling Framework.⁸³ No updated policy could be found on the Association's website.

10. Critics of current policy

In March 2018 Reverend Nile said he had “not seen much progress” by the NSW Government in implementing the 2014 Select Committee's recommendations, and he urged the Government “to do all that it can to wind back the number of poker machines in New South Wales”.⁸⁴

The NSW Greens have a [policy](#) on gambling which proposes measures in five broad areas: harm minimisation, monitoring and regulation, electronic gaming machines, casinos, and the racing industry.⁸⁵ In March 2019, the NSW Greens launched the initiative [People Before Pokies](#), which called for several measures including:

- Establishing a Commission of Inquiry into the influence of the gambling lobby on NSW politics;
- Introducing a \$7 billion transition package to phase poker machines out of pubs and clubs over 10 years;
- Giving local councils the power to cap machine numbers in their local area;
- Banning gambling advertising on public transport and in sport;
- Introducing \$1 maximum bets and putting an end to club loyalty programs for gamblers.⁸⁶

Similarly, the Alliance for Gambling Reform, a group of over 60 Australian organisations including local councils, has a [NSW campaign](#) that is calling for: giving local councils the right to say “No” to gaming machines, introducing \$1 maximum bets, and banning loyalty programs for gamblers.⁸⁷

11. Research reports

The NSW Government regularly commissions research on gambling harm minimisation.⁸⁸ The most notable recent NSW research is outlined below, along with a recent report on policy interventions to address gambling harms commissioned by the Victorian Responsible Gambling Foundation.⁸⁹

Reports commissioned by NSW Government

In 2015, the University of Sydney Gambling Treatment Clinic presented its [report](#) to the NSW Government on gambling harm minimisation (the Government released the report in October 2017).⁹⁰ The report made seven recommendations that were informed by three strategies: education, regulation, and mass communication. The [Government's response](#) supported in part two of these and noted the other five recommendations.⁹¹

Table 3: Recommendations and summary of government responses

| Report recommendation | Government response |
|---|---|
| 1. Shift focus from prevalence to measuring harms and individual level of excessive demand for gambling. | Supported in part. Next steps: Planning for the statewide gambling survey commenced in mid-2017. |
| 2. Support the development of long-term prevention strategies that seek to mitigate individual levels of excessive demand for gambling without recourse to stigma or highlighting acute harms, in order to promote better engagement with the harm minimisation message. | Supported in part Next steps: An evaluation of the campaign aimed at raising awareness and understanding of the risks of online sports betting will be completed by the end of 2017. |
| 3. Legislate a whole-of-industry responsible code of practice, which, amongst other measures, extends restrictions on advertising to all risky gambling products, and prohibits all licensed gambling operators, including online bookmakers, from offering all types of inducements to new or existing customers in NSW. | Noted. Next steps: The Government is currently working with other Australian jurisdictions to implement key measures within a national consumer protection framework for online gamblers by the end of 2017. A research project to develop an updated statewide harm minimisation strategy is expected to commence in late 2017. |
| 4. Mandatory reporting of the actual proportion of annual profitable gamblers. | Noted Introducing this kind of reporting scheme would be difficult. |
| 5. Positive alerts to players, in reference to 'losses disguised as wins', where the return is less than the amount wagered, be added to the Gaming Machine Prohibited Features Register on all future gaming machines. | Noted Next steps: The timing of the proposed review of the Gaming Machine Prohibited Features Register is to be determined. |
| 6. Prioritise the identification of psychosocial factors associated with an increased risk of harm including individual barriers to a more realistic understanding of the mathematical principles that underlie the misperception of risk and the excessive demand for gambling products. | Noted Next steps: The Government will continue to work with industry to ensure that all individuals are able to access information that will help to explain the risks associated with gambling products to underpin ongoing work to help individuals respond to excessive demand. |
| 7. Supporting research that seeks to define personal financial thresholds at which harms are likely to emerge. This may include defining a new construct called 'a relative unit of gambling', similar in principle to a 'standard unit of alcohol', which may be used for the purpose of mass dissemination and harm minimisation. | Noted. Next steps: The Government will review the outcomes of the Victorian research projects to develop an empirically derived measure of responsible gambling consumption once they are finalised. |

In 2019-20 budget estimates, the Minister for Customer Service, Victor Dominello, responded to a question about the implementation of Recommendation 5 (losses disguised as wins):

The Government is undertaking a review of the NSW Gaming Machines Prohibited Features Register to determine whether any new or proposed gaming machine features present an unreasonable risk of harm to players.⁹²

As part of this review, the Government commissioned research on the impact of gaming machine characteristics on gambling harm. The November 2019 [report](#) discussed losses disguised as wins (LDWs):

Based on recent research on LDWs, this clearly highlights that they have potential to cause gambling harm, although LDWs are also a preferred characteristic of gaming machine play. In addition, players receive longer time on EGMs due to LDWs, as they effectively help extend the duration of gaming machine play. As such, while LDWs pose risk to gamblers, the threshold of harm remains unclear. Accordingly, this highlights the importance of identifying the proportion of LDWs that balance player needs with the potential for LDWs to cause gambling harm.⁹³

In March 2017, two reports were completed for the NSW Government in response to the 2014 Select Committee's recommendations. One [report](#) was on the potential for third party exclusion schemes in pubs and clubs to minimise the harm of problem gambling: i.e. schemes that allow family, close friends and potentially even venues being able to exclude or ban a person from a venue(s). The report concluded:

Findings of the research highlight that third party exclusion alone is unlikely to play a significant role in minimising gambling harm to third parties, although it may be helpful for some gamblers ready to change their gambling behaviour.

However, a review of literature and discussions with a range of stakeholders highlighted that mandatory counselling of problem gamblers and financial restrictions to protect a family's financial resources may have greater potential to reduce harm to third parties impacted by problem gambling.⁹⁴

The second [report](#) was on the separation of ATMs and gaming machines in pubs and clubs. It concluded:

There is a potential harm-minimisation benefit in placing ATMs a minimum distance of 30m from the gaming area entrance in NSW pubs and clubs and out of the line of sight of gamblers. The capacity for individual venues to relocate ATMs at a minimum distance of 30m and the associated costs will vary significantly across venues and requires further investigation.⁹⁵

In 2019-20 budget estimates, the Executive Director, Liquor, Gaming and Racing replied to a question about this report:

The Government response to that report was that it would be very difficult to rip out ATMs that are already in place across the State. However, the response was that as a best practice standard that ATMs should be 30 metres. Going forward that is the best practice standard that is being applied.⁹⁶

Report commissioned by Victorian Responsible Gambling Foundation

In June 2019, the Victorian Responsible Gambling Foundation, a statutory authority, published a [report](#) on effective policy interventions to prevent gambling-related harm.⁹⁷ It sought to answer three research questions:

RQ1. What are the most effective evidence-based policies and initiatives to reduce harm associated with gambling, what are the gaps, and what should be the priorities?

RQ2. What have been the most effective policy drivers for change in areas such as alcohol, tobacco, physical activity and HIV, and how might they be replicated in gambling?

RQ3. What effective policies used or proposed in other areas of public health could be translated to gambling?⁹⁸

The report made 104 recommendations across 17 areas. Recommendations were categorised as “high priority” and on the basis of their “ease of implementation”. Examples of “high priority” recommendations in each of the 17 areas are set out in the table below.

Table 4: Examples of recommendations to prevent gambling-related harm

| Area | Summary of recommendation |
|---|--|
| Structural characteristics of gambling products | In relation to electronic gaming machines, further reduction in the maximum bet limit, ideally to one dollar per bet (Rec 2) |
| Pre-commitment and self-exclusion | Pre-commitment systems operating as ‘voluntary’ or ‘opt-out’ systems should be mandatory (Rec 12) |
| Interactive and ‘pop-up’ messaging | Support systems including counselling and advice on limit setting and risks associated with gambling activities should be marketed via pop-up messages regularly or under certain conditions. (Rec 26) |
| Accessibility and exposure | EGM venue size should be reduced over a period of time to reduce the gambling intensity of large venues. (Rec 27) |
| In-venue and real-time identification of ‘problem gamblers’ | Venue and online gambling operators must be required to implement mandated interventions when indicated via either personal observation or algorithmic identification. (Rec 35) |
| Restrictions on advertising or marketing | Sponsorship or branding of sporting competitions by gambling operators should be phased out over a reasonable period. (Rec 41) |
| Stigma reduction | Effective campaigns and messages to counter the stigma associated with experience of gambling harm are key to overcoming the harms of gambling. (Rec 42) |
| Price | Price information for gambling products should be provided as transparently and clearly as possible. (Rec 48) |
| Framing of the issue | It is timely to move from the ‘responsible gambling’ discourse to a discourse of gambling harm prevention and minimisation. (Rec 49) |
| Affect, place of consumption, and the | Warning information for gambling should be focused on provision of accurate information about the risks of |

| Area | Summary of recommendation |
|--|--|
| social world of the gambler | gambling harm arising from specific gambling types. (Rec 59) |
| Product information | Information about the structural and other characteristics of all gambling products must be prominently and accurately provided within gambling venues and via all mobile applications or web sites offering gambling products. (Rec 67) |
| Structure of the industry | Experience suggests that large gambling operators are difficult to regulate effectively. Mechanisms to reduce market concentration are warranted. (Rec 74) |
| Regulatory fragmentation | Australian governments should use the Council of Australia Governments (COAG) and other processes to pursue agreement to remove any tax redistribution or other disincentives to more effective harm prevention and minimisation policy and interventions. (Rec 77) |
| Industry influence on research | Population monitoring studies should be preferred to prevalence studies as a means for developing understanding of the nature and extent of gambling harms. (Rec 85) |
| Advertising, marketing, knowledge transfer and educational interventions | Campaigns and messaging around addressing existing gambling harm should be carefully developed to avoid stigmatising those affected by gambling harm, should be oriented towards factual information about the nature and lived experience of harms, and provide clear advice for action to address those harms. (Rec 90). |
| Standard of evidence | Interventions or policy changes intended to prevent or minimise gambling harm should be evidence based. However, given the nature of the gambling system, and its complex determinants, clinical standards for evidence supporting interventions are untenable, and should not be adopted.(Rec 97) |
| Multi-faceted and systemic interventions | Responses to gambling harm should be developed iteratively but systematically in order to produce a strategic approach that addresses all relevant factors to the greatest extent possible. (Rec 102) |

12. Conclusion

Australia is reported to have the highest per capita gambling losses in the world. NSW has the second highest per capita gambling losses in Australia and the highest per capita gaming machine losses in Australia. In NSW, 1% of adults are problem gamblers, and a further 2.8% are moderate-risk gamblers ([2019 NSW Gambling Survey](#), refer Table 1, p 5). Due to survey differences, it is difficult to compare problem gambling rates in NSW with other Australian and international jurisdictions.

In the last five years, the NSW Government has introduced various legislative reforms, including banning betting advertising during sporting fixtures, changing the Local Impact Assessment scheme for gaming machines, increasing penalties for offering an inducement to gamble, and implementing stage one of the *National Consumer Protection Framework for Online Wagering*. It also set up the Office of Responsible Gambling, which has published a three-year strategic plan with a vision of working towards zero

gambling harm. The plan's goals relate to: research, partnerships, education and awareness, support services, and technology and innovation.

Critics continue to argue that NSW has too many gaming machines in pubs and clubs and that much more needs to be done to address gambling harms. The Alliance for Gambling Reform is currently calling for: giving local councils the right to cap gaming machines in their area, introducing \$1 maximum bets for gaming machines, and banning loyalty programs for gamblers. Recent research reports recommend a range of other measures (such as prohibiting gaming machines from having losses disguised as wins; and phasing out gambling sponsorship in sport) to improve harm minimisation.

- ¹ See, for example, Gladstone N, [NSW pokie profits now as big as the GDP of a south Pacific nation](#), *Sydney Morning Herald*, 26 October 2019; Livingstone C, [Australia has a long way to go on responsible gambling](#), *The Conversation*, 16 August 2018; *Sydney Morning Herald*, [Death shows need for pokies reforms](#), 4 July 2018; Young M and Markham F, [Three charts on: Australia's addiction to poker machines](#), *The Conversation*, 27 June 2017; Reith G et al, [Gambling and public health: we need policy action to prevent harm](#), 2019, *British Medical Journal*, 365:l1807.
- ² This five year period follows the report of the Legislative Council Select Committee on The Impact of Gambling, [The Impact of Gambling](#), 14 August 2014. The NSW Government's February 2015 [response](#) to this report supported 12 of the 18 recommendations (some in part or in-principle). For a major national inquiry report on gambling, see Productivity Commission, [Gambling](#), Inquiry Report No. 50, 26 February 2010.
- ³ Browne M and others, [NSW Gambling Survey 2019](#), NSW Responsible Gambling Fund, September 2019, p ii, p 24.
- ⁴ Queensland Government Statistician's Office (QGSO), Queensland Treasury, [Australian Gambling Statistics 1991–92 to 2017–18](#), 35th edition, December 2019. Note that the figures for each individual state include turnover and losses generated by overseas and interstate visitors as well as those generated by residents of that state. Similarly, the per capita figures are based on the resident population figures and do not take any account of overseas or interstate visitors.
- ⁵ QGSO, note 4, Summary Table A.
- ⁶ QGSO, note 4, Summary Table D. The report defines expenditure as "the net amount lost or, in other words, the amount wagered less the amount won, by people who gamble".
- ⁷ QGSO, note 4, Summary Table E.
- ⁸ Letts S, [Chart of the day: Are Australians the world's biggest gambling losers? You can bet on it](#), *ABC News*, 20 November 2018
- ⁹ QGSO, note 4, Summary Table D.
- ¹⁰ QGSO, note 4, Summary Table D.
- ¹¹ QGSO note 4, Summary Table E.
- ¹² QGSO, note 4, State Tables, Table NSW 51 and NSW 53.
- ¹³ QGSO, note 4, Summary Table D. Note that gaming machine expenditure does not include expenditure in casinos.
- ¹⁴ QGSO, note 4, Summary Table E.
- ¹⁵ QGSO, note 4, State Tables, Table NSW 21 and NSW 23.
- ¹⁶ Liquor and Gaming NSW, [Clubs | Gaming machine report by LGA | 1 Jun 18 - 30 Nov 18; Clubs | Gaming machine report by LGA | 1 Dec 2018 - 31 May 2019; Hotels | Gaming machine report by LGA | 1 Jul 18 - 31 Dec 18; Hotels | Gaming machine report by LGA | 1 Jan 2019 - 30 Jun 2019](#). Gaming machine profits for clubs and hotels are equivalent to gaming machine losses for gamblers.
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- ¹⁸ QGSO, note 4, Product Tables, All Gambling 31.
- ¹⁹ Gaming Technologies Association, [World Count of Gaming Machines 2018](#), October 2019. Table A.
- ²⁰ Gaming Technologies Association, note 19, p 8.
- ²¹ Gaming Technologies Association, note 19, Table B.

- 22 Browne B, Minshull L, [Pokies pub test: Australia has most of the world's pub and club poker machines](#), The Australia Institute, December 2017, p 1.
- 23 Browne B, Minshull L, note 22, p 1.
- 24 Browne B, Minshull L, note 22, p 1.
- 25 Liquor and Gaming NSW, note 16.
- 26 QGSO, note 4, State Tables, Table NSW 57.
- 27 Revenue figures are from NSW Treasury, [Report on State Finances 2017-18](#), 19 October 2018.
- 28 Ford M and Håkansson A, [Problem gambling, associations with comorbid health conditions, substance use, and behavioural addictions: Opportunities for pathways to treatment](#), 2020, *PLoS One*, 15(1), e0227644.
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- 31 Browne M and others, note 3, p iii.
- 32 ABS, [3101.0 - Australian Demographic Statistics, June 2019](#), December 2019, Data cube: Population by Age and Sex, Table 8.
- 33 Browne M and others, note 3, p ii-iii, p 5-6, and p 26-27.
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- 36 Sporston K, Hing N and Palankay C, [Prevalence of Gambling and Problem Gambling in New South Wales](#), NSW Office of Liquor, Racing and Gaming, April 2012, Ch 6.5, 6.6.
- 37 ACIL Allen Consulting, Deakin University, Central Queensland University and The Social Research Centre. [Fourth Social and Economic Impact Study Of Gambling In Tasmania: Report 2](#), Tasmanian Department of Treasury and Finance, 2017, p 51. See also Armstrong A and Carroll M, [Gambling activity in Australia](#), Australian Gambling Research Centre, Australian Institute of Family Studies, 2017, p 60.
- 38 The report cited Markham, F., Young, M., Doran, B. and others. [A meta-regression analysis of 41 Australian problem gambling prevalence estimates and their relationship to total spending on electronic gaming machines](#) 2017, *BMC Public Health*, 17, 495.
- 39 Calado F, Griffiths MD, [Problem gambling worldwide: An update and systematic review of empirical research \(2000–2015\)](#), 2016, *Journal of Behavioural Addictions*, 5(4), p 592-613.
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- 43 Centre for International Economics, [Economic contribution of the Australian gaming machine industry](#), Prepared for Gaming Technologies Association, August 2018, p 1.
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- 46 Browne M and others, [The social cost of gambling to Victoria](#), Victorian Responsible Gambling Foundation, November 2017, p 2.
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- 50 Independent Liquor and Gaming Authority, [Approved NSW Technical Standards: 'Regulation 2015' Changes](#), ILGA Circular, 3 July 2015
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- ⁶⁰ Daley M, [Hansard \(Legislative Assembly\)](#), 13 March 2018.
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