

**AGC Submission to the Senate Community Affairs Committee Inquiry – Poker Machine  
Harm Reduction Tax (Administration) Bill 2008**

**Submission Overview and Summary**

In light of Family First's call for the removal of electronic gaming machines from hotels and clubs, the Australasian Gaming Council (AGC) believes there is a need to reflect upon the significant advances made in harm minimisation and responsible gaming since the release of the Productivity Commission's 1999 Inquiry Report into Australia's Gambling Industries.

The following submission canvasses the current Australian gambling environment and the economic and social benefits provided to the Australian community by hotels and clubs with gambling facilities. A brief update follows, outlining important initiatives designed to address the issue of problem gambling and its impact upon Australian individuals, families and communities.

In particular this submission:

- explains the role of the AGC as a body, affiliated with the industry sector, committed to principles of sustainable and responsible gaming with an emphasis upon responsible gaming initiatives, education and information;
- summarises the Australian gambling environment with reference to gambling on Electronic Gaming Machines (EGMs) in hotels and clubs;
- notes the social and economic contribution made by clubs and hotels with gambling facilities to the community and to families - with particular reference to the support provided to problem gambling help services, government projects, charitable contributions and employment;
- provides up-to-date data relevant to problem gambling prevalence within the community;
- discusses the concept and practice of responsible gambling in Australia's hotels and clubs with reference to legislated harm minimisation measures, consumer assistance initiatives and further initiatives undertaken by industry in collaboration with government and community; and
- emphasises the importance of informed choice, education and financial literacy as strategies that empower individuals and families to achieve control and understanding of their gambling behaviours. These measures assist in the achievement of balanced decisions with regard to discretionary leisure expenditure and healthy financial choices.

Attached to this submission is the AGC discussion paper, *The Gambling Environment 2007 Changes since 1999*. This paper was referred to extensively by Productivity Commission Chairman Gary Banks, in his 2007 address to the Australian Gaming Expo Conference, as a source of updated and accurate facts and figures. The paper notes that the Australian gambling environment and culture has fundamentally altered since 1999, with the delivery of responsible gambling at the forefront of change.

Yours sincerely,



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## **AGC Submission to the Senate Community Affairs Committee Inquiry – Poker Machine Harm Reduction Tax (Administration) Bill 2008**

### **1. Introduction**

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The Australasian Gaming Council (AGC) appreciates the opportunity to provide a submission to the Senate Community Affairs Committee Inquiry into the *Poker Machine Harm Reduction Tax (Administration) Bill 2008*.

### **2. About the Australasian Gaming Council**

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The AGC is a national gambling industry body which was established by leaders of the Australian gambling industry after the 1999 Productivity Commission Inquiry into gambling.

The organisation's charter is to maintain a sustainable industry in Australia and New Zealand through the promotion of:

- responsible gambling initiatives;
- robust gambling research;
- gambling education; and
- industry participation in public policy debates and forums.

A list of the AGC's Directors and membership is available on the AGC website [www.austgamingcouncil.org.au](http://www.austgamingcouncil.org.au) and is also attached, as is a summary of current AGC activity and participation.

The issues around gambling in Australia are complex and involve many stakeholders. The AGC Board has broad and senior sector industry representation, works collaboratively with other associations and is well placed as a body to be consulted by and work with government on this important issue.

### **3. The Gambling Industry and Australia's Gambling Environment**

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Australians have a long history of participation in gambling and the majority of Australians experience no difficulties arising from their choice to pursue legal gambling opportunities. Gambling is a favored recreational activity, a pastime that is enjoyed responsibly by a broad range of adults. Motivations for gambling vary; however most Australians who gamble report that they do so for enjoyment and in order to socialise as well as for the possibility of winning money.

The latest gambling prevalence statistics, reported in separate studies conducted throughout Australian jurisdictions during the last decade, indicate that, whilst participation appears to be decreasing in most states, as many as 70% to 85% of Australians participate in gambling activities at least once in any 12-month period. These activities encompass a wide range of the gambling forms available, from racing and wagering to lotteries, Keno, sports betting, casino table games and electronic gaming machines (EGMs). Of the approximately 15,254 businesses providing gambling services within Australia, 38% provide opportunities for gambling upon EGMs – a figure which has remained relatively constant since 2001-02. These businesses, which include some 3,448 hotels and 2,385 clubs, cater to the 30% of Australians who choose to gamble upon EGMs.<sup>2</sup> EGM gambling is a valid and enjoyable recreational pursuit and in most cases is factored into budgets by individuals and/or families as part of their discretionary entertainment and leisure expenditure.

#### **4. The Gambling Industry – Employment, Families and Community**

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Family First's *Poker Machine Harm Reduction Tax (Administration) Bill* states as its intent the removal of EGMs from hotels and clubs through the imposition of an onerous taxation regime. Any such aim underestimates the economic and social benefits afforded to the Australian community from revenue provided by hotels and clubs.

A viable and sustainable hotel and club industry is essential in order to maintain its sizeable, ongoing contribution to local, regional and state economies. Clubs with gaming facilities account for some 86% of club organisations. Registered clubs provide lifestyle and community focused goods and services to their members and to the community at large. These benefits are provided through a 'democratic, not-for-profit business model where gaming machine revenue typically cross-subsidises other club activities'.<sup>3</sup> Hotels encompass diverse holdings ranging in size and offer. Some are family businesses and most provide a variety of bar, bistro, restaurant, retail bottle shop and entertainment facilities as well as gaming. Australian Bureau of Statistics (ABS) figures from 2004-05 show takings of \$15,459.7million from gambling on EGMs in clubs and hotels for that period alone. These businesses are estimated to generate 0.5% of total GDP in 2007-08, which represents a real revenue growth of 0.7% in clubs and 2.4% in hotels.<sup>4</sup>

Income from hotels and clubs creates tangible taxation revenue for government. The aggregate taxation yield from EGMs in Australia was reported as \$2.8 billion in 2005-06.<sup>5</sup> Throughout Australia, funds gained from gambling taxation and levies have been utilised for a myriad of projects, including problem gambling helplines, treatment, counselling and community education services. Sizeable grants have been made to sporting and recreation groups, charitable organisations, community programs, infrastructure projects, education and training initiatives and cultural activities. Other benefits include additional donations and non-cash contributions made by clubs and hotels to their local communities and charitable causes.

Australia's hotels and clubs also contribute to the well-being of Australia's families by providing a broad range of employment and training opportunities. ABS data relating to hotels with gaming facilities indicate that in 2004-05, establishments that offered gaming and wagering services employed a total of 64,905 people. Total employment costs for these businesses in this period equated to \$1891.4 million.<sup>6</sup> Similarly, at the end of June 2005, licensed club premises with gaming facilities employed a total of 60,200 people (an average of 30 employees each), of which 23,813 were licensed gaming staff. Total employment costs for these businesses totalled some \$2022.6 million.<sup>7</sup> Hotels and clubs additionally employ numerous third party contractors to facilitate the provision of their hospitality goods and services. These include, but are not limited to, utility services, tradesmen, security services, food and beverage suppliers and entertainment providers.

In short, Australia's clubs and hotels are part of the fabric of Australian community life. Gambling facilities within these organisations enable them not only to subsidise or continue their operations, but to support and contribute to countless community causes, sporting groups and charities. Additionally, clubs and hotels offer continued employment and training opportunities to literally thousands of Australians – benefiting the national economy, individuals and families alike.

#### **5. Problem Gambling Statistics and Debate**

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In 1999 the Productivity Commission (the Commission) released its landmark report on Australia's Gambling Industries, a major work which stimulated discussion and debate as well as informing action. The Commission's report, in its exploration of the costs and benefits of gambling, also sought to gauge the nature and extent of problem gambling. The Commission viewed problem gambling as a continuum – recognising that some members of the community

may experience moderate difficulties with their gambling behaviours and others more severe problems. Whilst the Commission gave credit to varying definitions, problem gambling has since been, and is perhaps best defined as being, characterised by 'difficulties in limiting money and/or time spent on gambling which lead to adverse consequences for the gambler, for others, or for the community'.<sup>8</sup>

Since the national prevalence of problem gambling was last estimated by the Commission at 2.1%, various jurisdictions have conducted gambling prevalence surveys and screened for problem gambling (utilising at times similar, and at times wholly disparate, methods). Despite methodological difference and sampling size variations, problem gambling prevalence rates estimated for states/territories in Australia illustrate a downward trend in most jurisdictions.<sup>9</sup>

Queensland has been the most prolific state in terms of surveying with regard to gambling behaviours. Using the Canadian Problem Gambling Index (CPGI) since 2001 (a different screening tool to that used by the Productivity Commission), Queensland's problem gambling estimate has been reported as 0.83% in 2001, 0.55% in 2003-04 and further as 0.47%, or approximately 14,000 adults, in 2006-07.<sup>10</sup> The CPGI was administered in Victoria in 2003. It was subsequently reported that 0.97% of Victorians were estimated to be problem gamblers.<sup>11</sup> The 2003 Victorian survey additionally used the Victorian Gambling Screen (note that varying screens were applied to different respondents and that the screens differ in their question composition, response formats and cut-off scores). Under this screen, problem gambling in Victoria in 2003 was estimated to have a one-year prevalence rate of 0.74%.<sup>12</sup>

Using the CPGI measure in 2005, South Australia's problem gambling prevalence was estimated to be 0.4% or 4,825 persons. In comparison, frequent but low-risk and non-problem gamblers were estimated at 12.8% (142,931 persons).<sup>13</sup> Tasmania also commenced using the CPGI in 2005 and results of the screen indicated that 0.73% of the population were problem gamblers.<sup>14</sup> In 2006, when screened using the CPGI, New South Wales was found to have a problem gambling prevalence rate of 0.8%;<sup>15</sup> whilst in the Northern Territory in the same year, problem gambling prevalence was estimated at 0.64%.<sup>16</sup>

While caution must be exercised in any comparison between the work of the Productivity Commission and more recent prevalence surveys, the above findings suggest that problem gambling may be either stabilising or decreasing – as it similarly appears to be stabilising or decreasing in communities which have adapted to gambling availability in many jurisdictions worldwide.

In current discussions of problem gambling, Productivity Commission findings are often restated and it is noted that Family First has relied upon many of the Commission's statistics. Strategies recommended by the Commission to bring about a climate of responsibility and customer care still hold great merit and are reflected in the frameworks informing industry and government actions today. However it is faulty logic to presume that the precise figures cited by the Commission nearly a decade ago may be viewed as an accurate representation of Australian gambling behaviours, or the prevalence of problem gambling, in the present day. The Commission's report provoked rapid changes and in the intervening years a number of harm minimisation strategies have been put in place by the legislature, community and industry.

Furthermore, in 2008 there is available a growing body of discourse dedicated to problem gambling issues and impacts. Whilst it is not possible to provide, within the confines of this submission, any thorough discussion of the available literature, the AGC contends that the figures quoted and scenarios asserted by Family First do not take as balanced a view as a wider range of sources may provide. Statistics and statements that have been used in support of the *Poker Machine Harm Reduction Tax (Administration) Bill 2008* should not be accepted without reservation as uncontested fact, but rather as only some of the findings available in a multifaceted and dynamic area of research.

## **6. Responsible Gambling**

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Since 1999, attention has focused upon the development of frameworks to address the governance of gambling as a recreational activity, in balance with the issues raised by problematic gambling. In 2004, all states and territories in Australia and the Council of Australian Governments agreed that addressing problem gambling is a joint responsibility of governments, industry, communities and individuals.

The Ministerial Council on Gambling developed a framework to be implemented by state and territory governments in an effort to minimise the negative consequences of problem gambling to individuals, their families and the community, via a national approach.

The national framework on problem gambling is built upon the following principles:

- the community has a right to accurate and balanced information on gambling; on the risks associated with gambling and on available support services;
- gamblers, the gambling industry, the community, support service providers, state, territory and federal governments all share the responsibility for minimising the harm associated with problem gambling;
- while state and territory governments are responsible for ensuring that regulatory frameworks minimise problem gambling, harm minimisation measures can be enhanced when developed and implemented through collaborative partnerships that build on current best practice; and
- research and evaluation are essential to ensure that initiatives are likely to minimise problem gambling without unintended negative consequences for the community.

## **7. Harm Minimisation Initiatives**

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It remains an undisputed view jointly held by industry with government and the community that for those who are affected by the behaviours of another or who themselves experience difficulties with their gambling behaviours, problem gambling is a serious issue with the potential to impact upon financial, psychological, social and familial well-being. As such, over the last decade many harm minimisation measures have been put in place by state governments, and many more undertaken on a voluntary basis by the gaming industry, to reduce the prevalence of problem gambling and minimise the impact of problem gambling when it does arise.

The strategies endorsed by state governments to date have largely focused on venue and EGM restrictions including:

- restrictions upon ATM locations and withdrawal limits;
- restrictions upon the availability of credit to customers;
- EGM note acceptor denomination limits;
- restrictions upon cash payouts, with cheque payments required for EGM winnings over a specified amount;
- limits to EGM spin rates;

- caps on the amount of EGMs accessible to the public in any jurisdiction and area;
- restrictions to the opening hours, advertising and signage of venues with EGM gaming;
- lighting and other requirements such as the provision of clocks upon EGMs; and
- smoking restrictions which effectively enforce breaks in play.<sup>17</sup>

Hotels and clubs with gambling facilities are among the most heavily regulated industries throughout Australian jurisdictions. They have demonstrated on a consistent basis that they are prepared to adopt measures addressing the issue of problem gambling and continue to work cooperatively and effectively with government and community in implementing a safe gambling environment for Australian consumers.

## **8. Self-exclusion**

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Self-exclusion is an important program offered by industry for individuals who acknowledge that they have a problem with their gambling. Self-exclusion is designed to provide effect to the individuals' choices with regard to the control of their gambling behaviours, through self-barring from gaming venues or gaming areas within the venue.

In clubs and hotels, self-exclusion programs are legislated in New South Wales, Queensland, South Australia and Tasmania, while a voluntary Code of Practice operates in Victoria. The ACT operates its self-exclusion programs under a mandatory Code of Practice. In Victoria, New South Wales and South Australia, a person can choose to be excluded from one to all venues. In Tasmania, a person can choose the venues and activities from which they are to be excluded, while Queensland and the ACT run venue-specific self-exclusions.<sup>18</sup>

Research has indicated that problem gamblers require a range of comprehensive measures, including counselling assistance, to support changes to previous modes of behaviour. Gaming industry groups have been proactive in sourcing practical and customer-focused methods of assistance.

As an example, in Victoria following the release of an AGC report into self-exclusion,<sup>19</sup> the Victorian Gaming Machine Industry (VGMI) has partnered with Gambler's Help and the Victorian Commission for Gambling Regulation (VCGR) in the pilot of a supported model of self-exclusion from hotels and clubs administered by the Australian Hotels Association. In a 2008 evaluation of the pilot program, a summary of the key findings reported that 62.9% of participants felt that the assistance received had helped them to keep their gambling under control. Further, over 50% of participants not engaged in counselling at first contact had subsequently accepted referrals.<sup>20</sup>

## **9. Further Initiatives**

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### **Codes of Conduct**

Industry has developed a number of self-regulation initiatives, amongst them voluntary codes of practice, of which there are some 40 codes in existence Australia-wide. The Queensland model (launched in 2002) represented a tripartite effort (government, industry and community) in setting comprehensive voluntary standards related to gambling in Queensland venues and has since been adopted also in the Northern Territory and the ACT. South Australian hotels and clubs comply with their Responsible Gaming Code of Practice as a condition of holding a gaming licence and breaches of the code can lead to penalties. More recently in Victoria, operators have

adopted a responsible gambling compliance framework which is in accordance with Australian Standard AS3806 *Compliance Programs*. In December 2007, the Victorian Government passed the *Gambling Legislation Amendment (Problem Gambling and Other Measures) Act*. Under this Act, industry participants will be required to have their Responsible Gambling Code of Conduct approved by the VCGR.

Most jurisdictions within Australia have provisions within a code or regulation for industry to develop relationships with counselling providers. There are several examples of the industry exceeding prior recommendations for gambling establishments to form relationships with local agencies. As merely one example, BetSafe, an initiative of registered clubs and hotels in New South Wales and Canberra, was one of the first programs to be introduced in Australia. This comprehensive program, devised and fully implemented in consultation with responsible gambling experts, provides a free 24-hour problem gambling counselling service designed to be venue-specific while still providing a uniform approach.

### **Early Intervention and Staff Training**

Industry codes and current responsible gaming practices reflect the Productivity Commission's finding that it would clearly be appropriate for venues to take action when an individual is showing obvious signs of distress associated with their gambling. In 2002, the AGC asked prominent psychologists and practitioners in the field of problem gambling to give their professional views on problem gambling behaviours, with a view to ascertaining if such behaviours could be reliably identified within a gambling venue.<sup>21</sup> The discussion papers showed no consensus on a set of criteria that can be used in the gaming room to identify a problem gambler. Venues, however, should be open to presenting clear and accessible information regarding available modes of support or to referring customers who may be experiencing difficulty with their gambling, to appropriate sources for help and further options to assist.

South Australia provides an example of industry involvement in early intervention with their 'Gaming Care' and 'Club Safe' programs. Established in 2005, Gaming Care's core business is to support the hotel industry's gaming venue management and staff by facilitating early access by identified problem gamblers to gambling support services. Gaming Care is totally funded by the gaming industry. It employs responsible gambling officers who implement early intervention strategies, assist in achieving a high level of compliance with the regulatory codes of practice, and facilitate collaborative and cooperative relationships with gambling counselling services.<sup>22</sup> Established in 2006, Club Safe assists the South Australian club industry in a similar fashion, with responsible gaming obligations and early intervention techniques. It has been recognised that gamblers at venues supported by programs such as these are in a better position to set limits on their gambling and more aware of problem gambling issues by virtue of exposure to industry responsible gaming programs.<sup>23</sup>

Whilst responsible gaming training program requirements vary, accredited programs have been developed in conjunction with industry groups, registered training providers and community support services throughout Australian jurisdictions. In Victoria, contributors to just one of the responsible service of gaming courses available include William Angliss Institute of TAFE, Tattersall's, Tabcorp, the Australian Hotels Association and Clubs Victoria in consultation with Gambler's Help. Such courses provide gaming staff and potential gaming staff with knowledge and skills to assist in developing a responsible and professional environment that minimises the potential for harm.

### **Collaborative Forums and Working Parties**

Gaming Industry members actively participate in a number of working parties with mandated advisory responsibilities to relevant government ministers. Established since 1999, these groups, which include the Victorian Responsible Gambling Ministerial Advisory Committee, the South

Australian Responsible Gambling Working Party and the Queensland Responsible Gambling Advisory Council, discuss responsible gambling, social and economic issues and represent the real and collaborative partnerships that have been developed between industry, community and government.

## **10. Informed Choice, Education and Financial Literacy**

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### **Informed Choice**

Information that is easily accessible and clear about the probability of winning provides a better understanding of the foreseeable consequences of gambling and/or gambling to excess. Since the 1999 report of the Productivity Commission, a great deal of work has been undertaken in this area. The Commission advocated the introduction of a simple system of informing consumers about spend rates on machines and an indication of the likelihood of key payouts on the payout tables displayed on EGMs. In the subsequent Banks Paper - which discussed changes to Australia's gambling environment some three years later - it was reported that several governments require venues to provide information which enables a reasonable understanding of the odds and addresses false perceptions of how games work.<sup>24</sup> The Independent Pricing and Regulatory Tribunal of New South Wales in its 2004 report on gambling (the IPART Report) also focused on the importance of informed choice and felt the community should be provided with, 'accurate, clear and accessible information either to the community in general or to gamblers in particular to help them make informed choices about whether they will gamble and how they will gamble'.<sup>25</sup>

All states and territories now require the provision of player information on the odds of winning. The AGC's Paper on Informed Choice and Gambling considered that information should go beyond odds and probabilities and aim to modify values, attitudes and erroneous perceptions influencing behaviour.<sup>26</sup> In keeping with this recommendation, industry has shown commitment to the production of materials informing greater player understanding with regard to EGM gambling. As one example of this contribution, in 2007 the Australasian Gaming Machine Manufacturers Association (AGMMA) released a booklet available both in print and as a web-based document. Entitled 'Responsible Gaming Machine Play', the booklet provides information regarding myths, superstitions and false beliefs surrounding gambling, providing facts about the player's chances of winning, as well as information about how EGMs work.<sup>27</sup> In addition, clubs and hotels throughout Australian jurisdictions routinely carry or publish responsible gaming materials. Player Information Displays (PIDs) are also available on EGMs in some jurisdictions. PIDs consist of electronic screens which are designed to assist players in making more reasoned decisions about their choice to gamble, as well as informing them of information relevant to the particular EGM.

### **Education and Awareness Initiatives**

The AGC has noted that gambling education is increasingly viewed by policy makers as a key measure in promoting responsible gambling and the prevention of problem gambling.<sup>28</sup>

Financial literacy and an understanding of money management is an important component of responsible gambling behaviour. Gambling education programs in Australia have been developed in primary and secondary schools in Queensland and have also been introduced to the school's curriculum in Victoria, Tasmania and South Australia. The most recent announcement from the New South Wales Government has advised that \$90,000 will be allocated from the Responsible Gambling Fund to develop a comprehensive problem gambling resource kit for schools and TAFE counselors, in consultation with parent groups, schools' bodies and government departments, with industry collaboration through the AGC.

The AGC, with the support of Australian leaders in the gambling and hospitality industry, has advocated a coherent and balanced national approach to gambling education. Informed choice and education are cornerstones of responsible gambling, with impacts beyond those created by restriction and prohibition. These measures facilitate consumer protection across the range of gambler demographics by empowering individuals to make healthy decisions with regard to their current and future expenditure.

### **Financial Literacy and Limit Setting**

The Productivity Commission Report indicated a potential for 'pre-commitment' schemes to aid in the reduction of problematic gambling. In the years since, a number of government jurisdictions have been exploring options which assist better financial management - including limit setting techniques.

Pre-commitment is a term that has been too easily linked with notions of purely external control or the imposition of limitations upon the gambling public. There are a variety of means by which gambling venue patrons can choose, and in many cases already do choose, to set limits to their gambling expenditure. Methods may include, amongst other actions:

- making personal decisions about limits upon time frames and amounts for gambling;
- carrying only a budgeted amount to gambling venues;
- discussing or making agreements with family and/or friends about daily/weekly time or expenditure limits; and
- keeping records of gambling expenditure or maintaining a separate account for gambling funds.

In 2006, Gambling Research Australia (GRA) commissioned an attitudinal survey into the nature and levels of mechanisms which may allow consumers to set a limit around their gambling or assist them to better control their gambling and avoid overspending their limit. The study found that most regular gamblers do set limits - including problem and higher risk gamblers. Specifically, the study recommended the development of programs to educate regular gamblers on how to arrive at and stick to affordable limits set for gambling, develop budgets in other areas of life and monitor gambling expenditure over a longer period of time.

In November 2006, the South Australian Minister for Gambling established a Responsible Gambling Working Party. Chaired by the AGC's CEO, Cheryl Vardon, and comprised of industry, government and community representatives, the working party is mandated to consider the broadest range of voluntary customer commitment options for gamblers. A 2007 progress report of this working party considered the following criteria as the minimum requirements for achieving collaboration and agreement across stakeholders for the implementation of any customer commitment initiatives:

- cost effectiveness must be achieved with an emphasis upon efficiency within the context of a sustainable industry and venue viability;
- measures taken should be evidence-based and further research should be considered and incorporated where appropriate;
- flexibility is required, as any systems implemented must meet the needs of a variety of customers and venues;
- information must be accessible to support the informed choice of customers;

- measures should be capable of integration with existing industry responsible gaming programs;
- ease of use and variety are important to ensure that social gamblers, especially tourists, are not deterred or inconvenienced in their participation;
- compliance with Commonwealth privacy principles is necessitated; and
- voluntariness is a key for both provision and take-up.

## **11. Recommendations**

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The AGC believes that the current public discourse about the gambling industry in Australia needs to be informed from a robust foundation of accurate knowledge and education about the industry and makes the following recommendations to the Senate Community Affairs Committee:

- a) In consultation with gambling industry representatives, to compile accurate and up-to-date facts and figures about the gambling industry in Australia which establish the economic contribution and community benefits of the industry, to be considered alongside industry, community and government problem gambling harm minimisation initiatives;
- b) To complete the current Gambling Research Australia (GRA) program and to review the charter of the GRA and assess any impact of the years of research available on gambling public policy. The development of any further publicly funded research into the gambling industry should involve industry representatives at the table as key stakeholders; and
- c) To develop, in conjunction with the AGC, national gambling education modules for schools using the principles of the National Consumer and Financial Literacy Framework. This curriculum development work needs to complement existing gambling education programs in Australian schools.

## **12. Conclusions**

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Problem gambling is a complex issue requiring multiple solutions focusing upon prevention, protection and rehabilitation initiatives. Such strategies are best delivered as a shared responsibility via partnerships between community, industry and government and should include:

- the enhancement of responsible gambling policies and programs through balanced, evidence based research;
- increasing community knowledge and informing young people of the potential impacts of excessive gambling;
- reducing the risk factors for problem gambling through early intervention;
- ensuring gambling environments are safer and more supportive for consumers;
- working collaboratively with state systems of problem gambling treatment and support services; and

- promoting effective partnerships to address state and local gambling issues and concerns

The task is complicated. In the current debate the wellbeing of all stakeholders and the wider Australian public demands that an appropriate balance be sought between public health concerns for problem gamblers, the tangible economic and social benefits to individuals, families and the community provided by gambling facilities in hotels and clubs, and the amenity of those who gamble for recreational and social purposes only.

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## Sources

<sup>1</sup> Delfabbro, P. (2007) *Australasian Gambling Review*, Independent Gambling Authority, Adelaide.

<sup>2</sup> Figures across jurisdictions do show variation in participation figures for EGM gambling however an average figure across surveys conducted indicates a participation rate of approximately 30%. The number of gaming machines venues at clubs and hotels is calculated from state/territory gambling authority reports from 2005-06 reported in AGC (2007) *A Database of Australia's Gambling Industries 2006-07*.

<sup>3</sup> Independent Pricing and Regulatory Tribunal (2008) , *Review of the Registered Clubs Industry in NSW*

<sup>4</sup> IBISWorld Industry Reports - Clubs (Hospitality) in Australia: H5740, 29 February, 2008 and IBISWorld Industry Reports – Pubs, Taverns and Bars in Australia: H5720, 3 April, 2008

<sup>5</sup> Office of Economic and Statistical Research(2007), *Australian Gambling Statistics 2005-06*

<sup>6</sup> ABS 8687.0 Clubs, Pubs, Taverns and Bars 2004-05

<sup>7</sup> ABS 8687.0 Clubs, Pubs, Taverns and Bars 2004-05

<sup>8</sup> Gambling Research Australia (2005) *Problem Gambling and Harm: Towards a National Definition*

<sup>9</sup> This estimate was achieved utilising the South Oaks Gambling Screen ('SOGS') – The Canadian Problem Gambling Index ('CPGI') is now the preferred tool for population level research as a screen specifically developed for use in population surveys. The CPGI is based on the notion of a problem gambling continuum.

<sup>10</sup> Queensland Government (2008) *Queensland Household Gambling Survey 2006-07*

<sup>11</sup> Gambling Research Panel (2004) 2003 *Victorian Longitudinal Community Attitudes Survey*, The Centre for Gambling Research, Australian National University

<sup>12</sup> Gambling Research Panel (2004) 2003 *Victorian Longitudinal Community Attitudes Survey*, The Centre for Gambling Research, Australian National University

<sup>13</sup> Government of South Australia, Department of Families and Communities (2006) *Gambling Prevalence in South Australia*

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<sup>14</sup> Roy Morgan Research (2006) *The Fourth Study into the Extent and Impact of Gambling in Tasmania with Particular Reference to Problem Gambling*, Dept of Health and Human Services, Tasmania.

<sup>15</sup> ACNielsen (2007) *Prevalence of Gambling and Problem Gambling in NSW – A Community Survey 2006*, NSW Office of Liquor, Gaming and Racing, Department of the Arts, Sports and Recreation.

<sup>16</sup> Charles Darwin University School for Social and Policy Research and School of Health Sciences (2006) *An Overview of Gambling in the Northern Territory*

<sup>17</sup> Please note that these restrictions are not uniform throughout Australian jurisdictions and some restrictions may apply in whole or in part dependant upon location.

<sup>18</sup> A person in Tasmania may also be excluded from gambling via other mechanisms: by a venue operator, by a third-party who has a close personal interest in that person's welfare or by the Commissioner of Police. *Gaming Control Act 1993* (Tasmania).

<sup>19</sup> Blaszczyński, A., Ladouceur, R and Nower, L. (2004) *Self-Exclusion: A Gateway to Treatment*, Report prepared for the AGC.

<sup>20</sup> *Pathways to Recovery – Self-Exclusion Pilot Program Evaluation 2008 – Summary of Key Findings*. Presentation made at the Responsible Gambling Awareness Week (Vic) New Initiatives Forum Wednesday May 28, 2008.

<sup>22</sup> <http://www.ahasa.asn.au/index.php?a=3487>

<sup>23</sup> Government of South Australia (2007) *Supporting Customer Commitment – A Progress Report to the Minister for Gambling by the Responsible Gambling Working Party*.

<sup>24</sup> Banks, G. (2002) *The Productivity Commission's Gambling Inquiry: 3 Years On*, Presentation to the 12<sup>th</sup> Annual Conference of the National Association for Gambling Studies, Melbourne, November 2002.

<sup>25</sup> Independent Price and Regulatory Tribunal of New South Wales IPART (2004) *Gambling: Promoting a Culture of Responsibility*, June, 2004.

<sup>26</sup> Blaszczyński, A., Ladouceur, R., Nower, L. and Shaffer, H.J. (2005) *Current Issues Informed Choice and Gambling: Principles for Consumer Protection*. AGC.

<sup>27</sup> [http://www.agmma.com/Agmma\\_site/pdf/Responsible\\_Gaming.pdf](http://www.agmma.com/Agmma_site/pdf/Responsible_Gaming.pdf)

<sup>28</sup> Australasian Gaming Council Discussion Paper (2007) *New Directions: Gambling Education and Financial Literacy for Young People*, AGC.