



DESIGN COLLABORATIVE Pty Limited

ABN 36 002 126 954
ACN 002 126 954

Planning and Development Consultants

G W Smith
BSurv(QLD)
MCP(MIT)
MIS(Aust)
FPIA MRTPI
FAPI CPP

H M Sanders
MPhil(Lon)
MSc(Rdg)
FPIA MRTPI
MRICS CPP

J Lidis
BTP (UNSW)
MPIA CPP

GAMING MACHINES ACT 2008

LOCAL IMPACT ASSESSMENT CLASS 2

**CITIGATE SEBEL HOTEL
ALSO KNOWN AS
THE SEBEL SURRY HILLS
28 ALBION STREET
SYDNEY**

**PREPARED ON INSTRUCTIONS FROM
THE LICENSEE
MICHAEL SHERIDAN**

**JANUARY 2011
REF: 109420 16r LIA2**

CONTENTS

EXECUTIVE SUMMARY	1
1. INTRODUCTION	6
2. GENERAL INFORMATION REQUIRED BY THE GUIDELINES	6
3. SPECIFIC INFORMATION REQUIRED BY THE GUIDELINES	7
4. VENUE SPECIFIC INFORMATION REQUIRED BY THE GUIDELINES	10
5. LOCAL COMMUNITY	11
6. GAMING AND SOCIAL PROFILE DATA.....	12
7. HOW MUCH OF THEIR INCOMES DID ADULTS SPEND ON EGMS?	18
8. PERCEIVED SOCIAL IMPACTS AND ECONOMIC BENEFITS.....	19
9. CONSULTATION.....	20
TABLES.....	21

Plans

109420/A	Location of The Sebel in Sydney
109420/B	Google Earth image of The Sebel and its surrounds
109420/C	Local Government Areas within 5kms of The Sebel
109420/D	Plan showing clubs and hotels within 1km of The Sebel
109420/E	Plan showing schools, hospitals, places of public worship and community and sporting facilities within 1km of The Sebel

Annexures

1	Floor plans of the public areas of The Sebel
2.	Plan showing location of gaming room
3.	Patron survey report
4.	Evidence of notification of intention to submit an LIA
5.	Copy of letter from Sydney City Council
6.	Copy of letter from the Gambling Treatment Centre of University of Sydney

EXECUTIVE SUMMARY

ES1

The Citigate Sebel Hotel, now trading as the Sebel Surry Hills (*Sebel*) (Licence No LIQH400120621), has a gaming machine threshold (*gmt*) of 15 and keeps 15 electronic gaming machines (*egm*). The owner of the Sebel – Schwartz Family Company Pty Ltd – is seeking to increase its *gmt* to 17, a low-range increase of 2, under Clause 34 of the Gaming Machine Regulation 2010.

ES2

The Sebel is in the City of Sydney (*the City*) which the Casino Liquor and Gaming Control Authority (*the Authority*) has classified as a Band 3 LGA under Section 33 of the Gaming Machines Act 2001 (*the Act*). Any application for an increase in a *gmt* in a Band 3 LGA is required, by Section 35 of the Act, to be accompanied by a Class 2 Local Impact Assessment (*LIA2*).

ES3

In this instance, the owner of the Sebel is the owner of the Macquarie Hotel which is also in the City, some 400 metres north of the Sebel. There are poker machine permits attached to the licence of the Macquarie Hotel. It proposes – if this *LIA2* is approved – to transfer two of those permits from the Macquarie Hotel to the Sebel.

ES4

This document constitutes the *LIA2* required to accompany the application for the increase in the Sebel's *gmt*. It has been prepared on behalf of the owner and the licensee, by Design Collaborative Pty Ltd (*DC*).

ES5

The Sebel stands at the north western corner of Albion and Mary Streets, Surry Hills. **Plan 109420/A** shows its location on a street map of Sydney while **Plan 109420/B** is a Google Earth image of the hotel and its immediate surrounds.

ES6

Plan 109420/D shows the locations of known registered clubs and hotels (including those with licences endorsed under Section 16 of the Liquor Act 2007) in that area.

ES7

Plan 109420/E shows the locations of known schools (excluding privately operated language and like training schools), hospitals and public places of worship and sporting and community facilities in that area.

ES8

The Sebel is a 271-room, 4½-star-rated, hotel which caters for international and domestic travellers. The Sebel provides 10 conference rooms with capacities ranging from 10 to 220. The public areas of the hotel are located on the ground and first floors. The ground floor contains a large reception foyer, a business centre, function rooms, bistro, lounge and gaming room. The first floor contains function rooms and a restaurant. The Sebel's accommodation occupies the balance of the building which rises, in part, to 11 storeys above Albion Street. The ground floor bistro, lounge and gaming room is known as the Townhouse (*Townhouse*).

ES9

The Sebel's approved trading hours are: Monday to Saturday, 5am – 12 midnight; Sunday, 10am – 10pm; Good Friday, 12 noon – 10pm; Christmas Day, 12 noon – 10pm; and December 31, 5am – 2am the following day.

ES10

The Sebel's egms are only accessible to players between 10am and 11pm, Monday to Saturday, and 10am to 10pm, Sunday as a result of a condition of consent in D2007/821/B.

ES11

In order to establish the current patron profile in the Townhouse, the owner retained People for Places and Spaces to conduct interview surveys with patrons. **Annexure 3** contains its report on that survey.

ES12

No measurable increase in patronage is anticipated if two additional egms are installed.

ES13

The egms installed in the Sebel are supervised, maintained and operated in accordance with all requirements of the Gaming Machines Act 2001 and the Gaming Machine Regulation 2010 as well as industry guidelines.

ES14

The Sebel has, effectively, two clienteles. One consists of those who are either resident guests of the Sebel or who attend functions held at it. During the 10 months from July 2009 to April 2010, 43.7% of room nights sold were to domestic guests and 56.3% to international guests. The second consists very largely of people who work or live nearby and who patronise the Townhouse. The two are quite distinct and different. The licensee reports that – from his observations – relatively few resident guests patronise the Townhouse and almost none who attend functions do so.

ES15

The City seems to be the best option to adopt as the local community of the Sebel. At least, it – as a community - falls under a single local government.

ES16

The requisite gaming data are provided in **Tables 3 to 11** inclusive. There are nine other LGAs within five kilometres of the Sebel. Data is provided for the City, each of those nine LGAs and NSW.

ES17

Tables 3 to 6 set out the numbers of egms and the amounts spent on egms in the 10 LGAs.

ES18

The total number of egms in the ten LGAs fell by 1,425 between 2006 and 2010, a decline of 12%. In the City, the total number of egms fell by 366 (or 7%) with the number of egms in clubs declining by 443 (or 27%) but the number in hotels increasing by 37 (or 1%).

ES19

In the City, expenditures on egms rose by 10% between 2005 and 2006 and then fell by 3% in 2007, 8% in 2008 and by 1% in 2009. Overall, the decrease between 2005 and 2009 was 3.5%.

ES20

In the remaining LGAs, expenditures on egms rose by varying amounts between 2005 and 2006. All had overall decreases in expenditures on egms by 2009, except for Waverley which had an overall increase of 4.3%.

ES21

The falls in expenditures on egms shown in **Table 6** do not correlate with the numbers of egms in the LGAs and that suggests that gaming expenditure is not dependent on the number of egms in an area, at least, where there are substantial numbers of egms.

ES22

Table 8 shows that, except in Randwick and Mosman, the density of egms fell in all LGAs, generally by a greater amount than the NSW density did. However, **Table 8A** also shows a fall in Randwick and a greater fall in the City, largely due to reasonably rapid population growth.

ES23

Tables 9 and **10** show that average expenditure per adult on egms has fallen considerably in all of the 10 LGAs examined since 2006 although it has risen in NSW.

ES24

Table 11 sets out average annual takings (profit) per egm in each of the 10 LGAs and in NSW in constant dollars. While those averages fell in Leichhardt, Lane Cove and Mosman, they rose in all other areas.

ES25

The requisite social profile data are provided in **Tables 12** to **16** inclusive.

ES26

Table 12 lists the following population characteristics:-

- The City and Randwick, the two LGAs with universities (and, in the case of the City, many other higher educational establishments and hospitals) had markedly higher percentages of those aged 18-24 than the other areas. In the other areas, including NSW, the percentages were similar.
- Conversely, the City (but not Randwick) had a much lower percentage of those aged over 60 than the other areas.
- Only Botany Bay reached the NSW's level of indigenous persons at 2% with the City recording 1% along with Randwick, Leichhardt and Marrickville.
- Only Botany Bay had a higher percentage of those that did not complete Year 12 than NSW. The City, Woollahra, Waverley, Lane Cove, North Sydney and Mosman had percentages which were less than half that for NSW.

- Botany Bay had three times the NSW percentage of those employed as labourers in the workforce and Marrickville equalled NSW. The City had half the NSW level.
- The City's percentage of those in administrative and support services in the workforce equalled the NSW percentage and most of the other LGAs had close to that level except Botany Bay where the percentage was over 250% higher.

ES27

In terms of unemployment, **Table 12** also reveals that all of the LGAs had lower levels than NSW (6%) with the levels in the wealthier LGAs being the lowest. The City (with 5%) ranked with Randwick, Botany Bay and Marrickville.

ES28

Table 12 also lists the relationships in households in the 10 LGAs and NSW. The City is distinguishable by having a population which included low proportions of married couples, households with children and lone parents but it had high proportions of young adults, defacto couples, group households and lone persons. These characteristics are, no doubt, influenced by it being the home of a large 'gay' community. Nevertheless, they suggest that it may also contain groups who could exhibit higher than normal levels of susceptibility to gaming problems.

ES29

Table 13 sets out the five most-frequently-mentioned countries of birth as reported in the 2006 Census for each of the 10 LGAs. It is evident that all of the LGAs contain substantial proportions of persons born in many countries. Those countries ranked fifth in each LGA accounted for – at the highest – 2.7% of the total, ie, each overseas country contributed a very small proportion of residents.

ES30

Table 14, setting out the distributions of weekly household incomes, shows:-

- that in the City and Botany Bay, there were about the same percentages of households with incomes under \$500/week (18.8% in the City and 22.7% in Botany) as in NSW (20%). In all the other LGAs, those percentages were lower with Mosman recording 8.8%, Woollahra 9% and North Sydney 9.5%
- that at the higher end of the income scale, the City recorded 42.2% earning over \$1,500/week compared to 31.2% in NSW. Mosman recorded 55.3% and Leichhardt, 53.2%. On the other hand, Botany Bay recorded 28.8% well below Marrickville, the next lowest, with 38.8%
- the great range of wealth which occurs across households in the City. It had the highest percentage of very low incomes, a consequence of the large public housing estates it contains in Waterloo, Surry Hills, Glebe and Woolloomooloo as well as in numerous private boarding houses and the like. While not having the highest percentage in the highest income group, it rated well above the NSW level, a consequence of it incorporating areas of marked wealth such as Elizabeth Bay, Potts Point, Pyrmont and like Harbourside areas. Low income has been linked to greater susceptibility to gambling problems.

ES31

Table 15, setting out median incomes in 2006, shows that:-

- nine of the ten LGAs had higher median incomes than NSW did but, in Marrickville, all the medians were slightly below the NSW levels
- in the City, the median weekly income for individuals was 56% above that in NSW but, despite that, it ranked the fourth lowest among the 10 LGAs
- the City's median weekly family income was 54% above that in NSW and again it ranked the fourth lowest among the 10 LGAs but its median weekly household income was only 16% above NSW's and it again ranked as the fourth lowest. Its low household income maybe a reflection of the smaller average number of persons per household in the City.

ES32

Table 16 sets out the SEIFA levels for the 10 LGAs. ABS did not provide SEIFA for NSW but, in terms of the SEIFA for disadvantage, NSW level was in the range between 975 and 1000. On that basis, only Botany Bay fell below the NSW level on that index. Among the 10 LGAs, the City was ranked towards the lower end on each of the SEIFA indices.

ES33

Table 17 sets out the estimated average annual expenditure on egms as a percentage of annual median household expenditure in 2006. The City's percentage was well above those of all the other LGAs and NSW. That seems to be due to it attracting expenditure on egms from non-residents who include workers, shoppers, people seeking entertainment and tourists, both domestic and international.

ES34

An increase of two in the gmt of a hotel with an existing gmt of 15 in an area where there are, literally, hundreds of egms, is unlikely to have any perceptible positive or negative social impact on the local community.

ES35

Any negative effects arising from the addition of two egms at the Sebel would appear to be very limited. Moreover, any such effects should be offset by the removal of three egms from the Macquarie Hotel, some 400 metres away. At the LGA level, there would be a decrease in the numbers of egms which should – if anything – have a beneficial effect.

ES36

The owner of the Sebel recognises that the Authority has a policy of requiring applicants for increases in gmt to offer to make a positive contribution to the local community. The owner is a recognised benefactor of charitable and like organisations. In this instance, it proposes to make a donation of \$50,000 to the NSW University of Technology (which is based less than a kilometre from the Sebel) for educational purposes. That University serves the local community regardless of how it is defined and improvement to it will benefit that community.

1. INTRODUCTION

The Citigate Sebel Hotel, now trading as the Sebel Surry Hills (*Sebel*) is a 271-room, 4½-star-rated hotel which caters for international and domestic travellers. It faces Albion Street, west of Mary Street, Surry Hills. The Sebel provides 10 conference rooms with capacities ranging from 10 to 220. The public areas of the hotel are located on the ground and first floors. The ground floor contains a large reception foyer, a business centre, function rooms, bistro, lounge and gaming room. The first floor contains function rooms and a restaurant. The Sebel's accommodation occupies the balance of the building which rises, in part, to 11 storeys.

Those who use most of the public areas of the hotel are, principally, guests of the hotel (and, in some cases, their guests) and people attending functions. However, its ground floor Townhouse Restaurant/Lounge and Bar and gaming room (*the Townhouse*) are popular with local workers and residents.

The Sebel has a gaming machine threshold (*gmt*) of 15 and keeps 15 electronic gaming machines (*egm*).

The owner of the Sebel – Schwartz Family Company Pty Ltd - is seeking to increase its gmt by 2, a low range increase, under Clause 34 of the Gaming Machine Regulation 2010.

The Sebel is in the City of Sydney (*the City*) which the Casino Liquor and Gaming Control Authority (*the Authority*) has classified as a Band 3 LGA under Section 33 of the Gaming Machines Act 2001 (*the Act*).

Any application for an increase in a gmt in a Band 3 LGA is required, by Section 35 of the Act, to be accompanied by a Class 2 Local Impact Assessment (*LIA2*).

In this instance, the owner of the Sebel is the owner of the Macquarie Hotel which is also in the City, some 400 metres north of the Sebel. There are poker machine permits attached to the licence of the Macquarie Hotel. It proposes – if this *LIA2* is approved – to transfer those permits from the Macquarie Hotel to the Sebel.

This document constitutes the *LIA2* required to accompany the application for the increase in the Sebel's gmt. It has been prepared on behalf of the owner and the licensee, by Design Collaborative Pty Ltd (*DC*).

2. GENERAL INFORMATION REQUIRED BY THE GUIDELINES

- a) The Sebel Surry Hills (Licence No LIQH400120621) stands at the north western corner of Albion and Mary Streets, Surry Hills. **Plan 109420/A** shows its location on a street map of Sydney while **Plan 109420/B** is a Google Earth image of the hotel and its immediate surrounds.
- b) The Sebel's present gmt is fifteen (15). The increase sought in its gmt is 2.
- c) The Sebel is situated in the City of Sydney. As shown on **Plan 109420/C**, there are nine other LGAs which extend to within 5kms of The Sebel. They are the LGAs of -

CLGCA Band

Woollahra	1
Waverley	2
Randwick	2
Botany Bay	2
Leichhardt	1
Marrickville	2
Lane Cove	1
North Sydney	1
Mosman	1

d) **Plans 109420/D and E** are maps of the area lying within a 1km radius of The Sebel.

- **Plan 109420/D** shows the locations of known registered clubs and hotels (including those with licences endorsed under Section 16 of the Liquor Act 2007) in that area.
- **Plan 109420/E** shows the locations of known schools (excluding privately operated language and like training schools), hospitals and public places of worship and sporting and community facilities in that area.

Each identified establishment is numbered and each map is accompanied by a legend which classifies the establishment and gives its name.

e) The Sebel – as a business – is owned by Schwartz Family Company Pty Ltd (ACN 001 531 335)

f) The owner's contact details are:

Address: 25 Spring Street, Bondi Junction NSW 2022
Postal Address: as above
Telephone (business hours): 02 9369 0000
Facsimile: 02 9369 0001
Email: sfc@schwartz.com.au

3. SPECIFIC INFORMATION REQUIRED BY THE GUIDELINES

a) The Sebel Surry Hills (*Sebel*) is a 271-room, 4½-star-rated, hotel which caters for international and domestic travellers which faces Albion Street, west of Mary Street, in Surry Hills. The Sebel also provides 10 conference rooms with capacities ranging from 10 to 220. The public areas of the hotel are located on the ground and first floors. The ground floor contains a large reception foyer, a business centre, function rooms, bistro, lounge and gaming room. The first floor contains function rooms and a restaurant. The Sebel's accommodation occupies the balance of the building which rises, in part, to 11 storeys above Albion Street.

Those who use most of the public areas of the hotel are, principally, guests of the hotel (and, in some cases, their guests) and people attending functions. However, the Townhouse is popular with local workers and residents.

b) The Sebel's approved trading hours are:

Monday to Saturday	5am – 12 midnight
Sunday	10am – 10pm
Good Friday	12 noon – 10pm
Christmas Day	12 noon – 10pm
December 31	5am – 2am the following day

As a major 4½-star-rated accommodation hotel, it has mini-bars in guests' rooms and 24-hour room service.

The City of Sydney determined D/2007/821/B on 13 August 2007. It permitted works at the Sebel including the construction of “*a new timber deck in the undercroft area for bar and cafe use*”: That deck is now the Sebel's gaming room. D/2007/821/B contains conditions which affect the use of that deck, viz:

- (2) *The hours of operation of the bar and restaurant are restricted to between 10am and 11pm, Monday to Saturday inclusive and 10am to 10pm Sundays;*
- (7)(a) *The use of the front outdoor area shall be restricted to a maximum of 50 people;*

Consequently, the Sebel's egms are only accessible to players between 10am and 11pm, Monday to Saturday, and 10am to 10pm Sunday.

c) **Annexure 1** contains a set of plans which illustrate the floor layouts of the eleven levels of the Sebel to which the public and/or guests have access. There is a 126-space carpark beneath the Sebel for the vehicles of guests.

It is proposed that the two additional egms to be kept, if this LIA2 is approved, be installed in the Sebel's existing gaming room which has only recently been completed. That room only has space for two additional egms. **Annexure 2** is a plan showing the location of the gaming room and the proposed location of the two egm sought.

d) In order to establish the current patron profile in the Townhouse, the owner retained People for Places and Spaces to conduct interview surveys with patrons. **Annexure 3** contains its report on that survey.

Summarising the results of the 200 interviews undertaken during visits on two Thursdays and two Fridays in July 2010; they reveal -

- 40% were males
- 81% were aged between 26 and 60 years
- 17.5% had professional occupations
- 14% occupied managerial positions
- 46% held clerical positions
- 76% lived in the Sydney metropolitan area (see below)
16% lived in other parts of NSW
8% lived inter-state
- 79% spoke English only

- The most-common language spoken other than English was Hindi which accounted for 3.5% of the total followed by Filipino and Spanish, each of which accounted for 1%. Eighteen languages other than English were encountered
- 96% were employed
- 67% worked in Surry Hills, with 32% working in Centennial Place, a high rise office complex opposite the Sebel
- 12% worked in Regional NSW
- 7% worked interstate
- 4% worked in the CBD
- 4% worked in suburban Sydney

In terms of suburbs of residence, 10% lived in the City of Sydney and no other suburbs accounted for more than 2% of those interviewed. Those interviewed lived in 100 suburbs spread from Helensburgh, in the south, to Mt Colah, in the north, and from Vaucluse in the east to as far west as Mt Druitt, St Clair, Abbotsbury and Campbelltown.

[Up to 24% of those interviewed could have been guests of the Sebel in that they lived outside the Sydney metropolitan area but some of those who lived outside the metropolitan area may have been attending offices nearby.]

- e) No measurable increase in patronage is anticipated if two additional egms are installed.
- f) The egms installed in the Sebel are supervised, maintained and operated in accordance with all requirements of the Gaming Machines Act 2001 and the Gaming Machine Regulation 2010 as well as industry guidelines. In particular:
 - the licensee and all staff involved in gaming-related duties hold Responsible Conduct of Gambling Certificates. Copies of those certificates are kept on premises and are available for inspection by relevant authorities
 - the Sebel operates a self-exclusion scheme which complies with the provisions of the legislation through the AHA's GameCare
 - the Sebel has an arrangement with the AHA GameCare in relation to the provision of problem gambling counselling and patrons are advised of the "gambling HELP" service
 - staff have training in self-exclusion and on referral to counselling services
 - all required signage and notices are displayed in conspicuous positions and maintained
 - gambling counselling service contact cards are displayed in the gaming room
 - a clock is visible from each seated position in the gaming room
 - an ATM is located in the Townhouse at the Sebel but it is not in the gaming room
 - the Sebel does not provide credit
 - there is a limit of \$2,000 on cash payments for winnings
 - the Sebel will not cash cheques
 - the Sebel does not offer or provide promotional prizes that are indecent or offensive
 - the Sebel does not offer any inducements to gaming

- staff are not permitted to play the gaming machines when on duty at the Sebel
- the presence of poker machines is not made known outside the Sebel.

4. VENUE SPECIFIC INFORMATION REQUIRED BY THE GUIDELINES

- a) As set out above, the application which this LIA2 accompanies seeks approval to keep two (2) egm in a 271 room, 4½-star-rated, hotel in Surry Hills, close to Central Railway Station.
- b) There are 15 egm in the Sebel.
- c) The Sebel has, effectively, two clienteles. One consists of those who are either resident guests of the Sebel or who attend functions held at it. The second consists very largely of people who work or live nearby and who patronise the Townhouse. The two are quite distinct and different. The licensee reports that – from his observations – relatively few resident guests patronise the Townhouse and almost none who attend functions do so.
- d) The following data about resident guests has been extracted from the Sebel’s internal records for the ten months from July 2009 to April 2010:

- in terms of room nights sold, 43.7% were to domestic guests and 56.3% to international guests
- the average percentages of rooms sold to guests from the Australian states and territories were:

Queensland	6.2%
New South Wales	20.8%
Victoria	8.4%
Western Australia	2.2%
South Australia	2.3%
Northern Territory	0.2%
Tasmania	0.8%
ACT	3.4%

(These percentages add to more than 43.7% due to rounding to the nearest tenth of a percent.)

- The contributions made by guests from individual countries vary substantially from month to month. For example, in one month, the USA accounted for nearly 14% of all rooms sold but, over the other nine months, it accounted for an average of only 3%
 - The country accounting for the highest average proportion of rooms sold was China (at 10.5%). Other significant contributors were Japan, New Zealand and the United Kingdom
- e) The Sebel has operated at about its practical capacity in terms of room occupancy in recent years.
- f) The patron profile of those who patronise the Townhouse and gaming room are set out in 3(d) above.

5. LOCAL COMMUNITY

Section 36 (3)(d) of the Gaming Machines Act reads –

“(d) in the Case of a class 2 LIA:

- (i) the proposed increase in the gaming machine threshold for the relevant venue will have a positive impact on the local community where the venue is situated,.....”*

and Clause 39 (5) of the Gaming Machine Regulation reads –

“A Class 2 LIA must:

- (a) specify the positive impact (both social and economic) that the proposed increase in the gaming machine threshold for the relevant venue will have on the local community (including details of the benefits that the venue will provide)....”*

It is therefore necessary to define the local community of the relevant venue, ie, the Sebel. There is no guidance in the legislation or in the *Guidelines for Applicants*, issued by the Casino Liquor and Gaming Control Authority, about how the local community should be defined. In the former legislation, it was described as *“the people in the area or group from which the persons utilising the services and facilities of the hotel concerned are likely to be drawn”*.

As set out in 4(c), the Sebel is utilised by two quite distinct groups of people –

- i) those who use it for accommodation and conferences and
- ii) those who use its Townhouse as their *“local hotel”* for socialising, drinking, meals and gaming.

The first group consists – insofar as the people who use the Sebel for accommodation are concerned – of people who appear to live outside the Sydney metropolitan area. The home addresses of those who use it for conferences are not known but, logically, it would seem a majority of them probably reside in the metropolitan area.

Those who use the Townhouse appear either to live or work nearby. The latter are a small minority since only 10% of those interviewed lived in the City of Sydney (see 4(d) above). The majority lived in places spread across the Sydney metropolitan area.

Considering part, at least, of the first group of those who utilise the Sebel live in the metropolitan area and as most of those who utilise it as their local hotel live in that area but outside the City of Sydney, it would seem that the Sydney metropolitan area, with its 4,000,000 population, would be one option in selecting the area where the people utilising the Sebel reside. However, such an area is so large that it is illogical to describe it as *“a local community”*.

Similarly, it is illogical to attempt to define some small area close to, or within walking distance, of the Sebel as its local community for at least, two reasons:-

- i) many – if not the majority – of the people who utilise the Sebel in such an area are workers who do not live in that area; and

- ii) every one of those people has other hotels (with gaming machines) within a similar distance as the Sebel from their home or place of work.

As the legislation requires data to be provided for all LGAs within 5 kms radially of the Sebel, ie, the 10 listed in 2(c) above, those 10 LGAs also provide an option for a surrogate local community. In total, those 10 LGAs accounted for 32% of the places of residence of those interviewed in the Townhouse. It is estimated that there are about 600,000 adults in the 10 LGAs. Again, that is such a large number that they would scarcely be deemed to be a local community. Moreover, they are both geographically separated (by Sydney Harbour) and socially and economically diverse (as is illustrated by the tables below). These are factors which mitigate against them being considered “a community” of any kind.

In these circumstances, an arbitrary decision must be made. Despite it being only the place of residence of 10% of those surveyed at the Townhouse and having a population of over 160,000, the City of Sydney seems to be the best option to adopt as a surrogate of the local community of the Sebel. At least, it – as a community - falls under a single local government.

6. GAMING AND SOCIAL PROFILE DATA

The tables set out on pages 21 – 30 are based on information provided by the Office of Liquor Racing and Gaming (*OLGR*) supplemented by data from the Australian Bureau of Statistics (*ABS*). Each table sets out data for each of the ten LGAs lying, or extending to, within five kilometres of the Sebel identified in 2(c) above (*the 10 LGAs*). **Tables 2, 3 and 4** set out “raw” data as supplied by OLGR. **Tables 12, 13, 14 and 15** contain data sourced from the ABS. **Table 1** (on page 18) contains data from the Casino Liquor and Gaming Control Authority (*CLGCA*) and the ABS as does **Table 7** but it also contains data prepared specifically for this LIA by DC.

The presence of “visitors” affects ratios expressed in terms of population, eg, the density of egms. As **Table 1** (on page 21) shows, in every LGA, some visitors were counted on the night of the 2006 Census despite it being conducted on a date selected to avoid popular holiday times, particularly, school vacation periods. The percentages of the total population counted in the Census are - in general terms – about equal across almost all the ten LGAs. However, in the City of Sydney, 15.8% of the population counted were visitors on the night of the 2006 Census. They equated to 24,738 people, a number sufficient to distort the results appreciably. However, due to limitations on the disaggregation of Census data, it is not possible to ascertain how many of the 13,468 overseas visitors recorded in the City were adults.

In an endeavour to overcome this difficulty, OLGR has provided tables showing the estimated resident adult populations annually in each of the ten LGAs for the period between 2001 and 2007 based on estimates provided by the ABS. Those estimates do not align with the results from the Census. DC has then projected the data provided by OLGR over the years 2008, 2009 and 2010. Thus there seems likely to be inherent inaccuracies in those tables which depend on population data.

For that reason, DC has rounded some figures in some tables to avoid conveying the impression that the values produced for the various LGAs are precise.

There appear to be other problems with some of the data provided. **Table 2** (on page 21) sets out a comparison of the numbers of egms in hotels and clubs which are connected to the central monitoring system in each of the ten LGAs and the number of entitlements authorised in each of them. Both data was supplied by OLGR. The number of egms should not exceed the number of entitlements and it does not in any of the LGAs insofar as clubs are concerned but that is not the case with hotels. In this LIA, the numbers of egms connected to the central monitoring system are used throughout.

Finally, as the City of Sydney has been selected as the local community for the purpose of the LIA, the discussion that follows each table tends to focus on the City with the object of identifying any characteristic that might suggest its population could be at greater risk of problem gambling.

- a) **Table 3** (on page 22) sets out the numbers of egms in the 10 LGAs from 2006 to 2010. As supplied by OLGR, the numbers of egms in clubs, is as at May each year while those for egms in hotels are at June each year. However, to simplify computations, it has been assumed they are data for the same point in time. Because May and June fall near the end of the financial year but near the middle of the calendar year, annual figures are based on calendar years. Data for NSW is also included.

Table 3 reveals that -

- The total number of egms in the ten LGAs fell by 1,425 between 2006 and 2010, a decline of 12%. The number of egms in hotels remained relatively consistent over that time and the decline in total numbers resulted, primarily, from a reduction in egms in clubs.
 - In the City, the total number of egms fell by 366 (or 7%) with the number of egms in clubs declining by 443 (or 27%) but the number in hotels increasing by 37 (or 1%).
 - The number of egms in clubs fell in all ten LGAs.
 - The numbers of egms in hotels rose in the City and Randwick, was stable in the Botany Bay, Lane Cove and Mosman and fell in the remaining five LGAs.
- b) **Table 4** (on page 23) sets out the amounts spent on egms (or profits of egms) in current dollars, in each of the ten LGAs and NSW by quarter in each calendar year from 2005 to 2009 and provides annual totals for each area.
- c) **Table 5** (on page 24) sets out the same data as in **Table 3** but expresses it in constant dollar values (taken as at the 2009 value) thereby eliminating changes due to inflation.
- d) **Table 6** (on page 25) reduces the data in **Table 5** to a more readily-appreciated form.

Table 6 provides insights into true trends in expenditures on egms over the five years in the 10 LGAs. It reveals:-

- In the City, expenditures on egms rose by 10% between 2005 and 2006 and then fell by 3% in 2007, 8% in 2008 and by 1% in 2009. Overall, the decrease between 2005 and 2009 was 3.5%.

- The next-largest expenditures on egms were recorded in Randwick where they rose by 8% between 2005 and 2006 but fell by 10% between 2006 and 2009. Overall, there was a decrease of 3.1%.
- Marrickville recorded the third-largest expenditures over the five years. Again, expenditures rose by 7% between 2005 and 2006 but fell 2006 to 2009 by 18% resulting in an overall decrease of 11.4%.
- The fourth-largest expenditures were in Waverley where they rose by 5% between 2005 and 2006 but the fall from 2006 to 2009 was 5% to show an overall increase of 4.3%.
- The fifth-largest expenditures were in North Sydney where they rose by 7% between 2005 and 2006 but the fall from 2006 to 2009 was 13% with the overall decrease being 7.2%.

In the remaining LGAs in descending order of decrease in expenditures between 2005 and 2009, **Table 6** shows the following falls:-

Mosman	19.2%
Leichhardt	14.3%
Lane Cove	14.2%
Woollahra	10.0%
Botany Bay	1.0%

These falls do not correlate with the numbers of egms in the LGAs and that suggests that gaming expenditure is not dependent on the number of egms in an area, at least, where there are substantial numbers of egms.

- e) **Table 7** (on page 25) sets out the adult populations of each of the 10 LGAs as recorded at the 2001 Census and the 2006 Census together with the ABS estimates of those populations for 2005, 2006 and 2007 and projections, made by DC, of those estimates for 2008, 2009 and 2010.
- f) **Table 8** (on page 26) sets out the densities of egms in each of the 10 LGAs and NSW for each year from 2006 to 2010 as provided by OLGR. Since OLGR did not allow for any population growth between 2007 and 2010, the densities shown in **Table 8** are inflated in those years. **Table 8A** (on page 26) sets out the densities of egms calculated from the data in **Tables 3** and **7** for 2008, 2009 and 2010.

Table 8 shows that, except in Randwick and Mosman, the density of egms fell in all LGAs, generally by a greater amount than the NSW density did. However, **Table 8A** also shows a fall in Randwick and a greater fall in the City, largely due to reasonably rapid population growth.

- g) **Table 9** (on page 26) shows the estimated average annual expenditure per adult on egms in each of the 10 LGAs in NSW for the five years to 2009 in constant dollars. It is based on **Tables 5** and **7**.

Table 9 shows that, in all the ten LGAs, the average amounts spent by adults annually fell but that figure rose in NSW.

- h) The percentage changes in average annual expenditure per adult on egms from 2005 to 2009 are set out in **Table 10** (on page 27).
- i) **Table 11** (on page 27) sets out average annual takings (profit) per egm in each of the 10 LGAs and in NSW in constant dollars.

While those averages fell in Leichhardt, Lane Cove and Mosman, they rose in all other areas.

- j) **Table 12** (on page 28) sets out the characteristics of the populations and relationships in households, listed in the Guidelines, for the 10 LGAs and NSW as recorded at the 2006 Census.

Examining each item in **Table 12** in turn, those dealing with **population** reveal:

- *Percentage aged 18-24:* The City and Randwick, the two LGAs with universities (and, in the case of the City, many other higher educational establishments and hospitals) had markedly higher percentages than the other areas. In the other areas, including NSW, the percentages were similar.
- *Percentage aged over 60:* Conversely, the City (but not Randwick) had a much lower percentage than the other areas. Apart from Woollahra and Mosman (which had higher percentages than NSW did) and Botany Bay (which had the same percentage as NSW), the other areas had lower percentages of those over 60 than NSW did.
- *Percentage of indigenous persons:* Only Botany Bay reached the NSW's level of 2% with the City recording 1% along with Randwick, Leichhardt and Marrickville.
- *Percentage that did not complete Year 12:* Only Botany Bay had a higher percentage than NSW. The City, Woollahra, Waverley, Lane Cove, North Sydney and Mosman had percentages which were less than half that for NSW.
- *Percentage employed as labourers in the workforce:* Botany Bay had three times the NSW percentage and Marrickville equalled NSW. The City had half the NSW level.
- *Percentage in administrative and support services in the workforce:* The City's percentage equalled the NSW percentage and most of the other LGAs had close to that level except Botany Bay where the percentage was over 250% higher.

In terms of **unemployment**, all of the LGAs had lower levels than NSW (6%) with the levels in the wealthier LGAs being the lowest. The City (with 5%) ranked with Randwick, Botany Bay and Marrickville.

The data on **relationships in households** is based on the numbers of people aged 15 or over. It shows: -

- *Married couples:* The City had just over half the percentage of married persons recorded in NSW. In the other LGAs, the percentages were generally about the NSW percentage.
- *Defacto couples:* The City, Waverley, Leichhardt and North Sydney had levels about twice that in NSW with only Botany Bay and Lane Cove being at, or below, that level.

- *If married and defacto couples* are considered together, they accounted for 38% of the City's households compared to 46% in NSW. Most of the other LGAs had percentages close to the NSW level with Botany Bay having the lowest (at 41%), while Marrickville (with 49%) had the highest.
 - *Lone parents:* Botany Bay had the same level as NSW but all the other LGAs had levels below that.
 - *Households with child under 15:* Only Botany Bay, Marrickville, Lane Cove and Mosman approached the NSW level. The City had about a third of that level.
 - *Households with dependant children:* All LGAs except the City, Leichhardt and North Sydney, had about the NSW level but those three had lower percentages.
 - *Non-dependant children:* The City had less than half the NSW level. Only Randwick, Botany Bay and Marrickville had percentages close to the NSW level.
 - *Other related individual:* The City had twice the NSW level as did Randwick (probably, again reflecting their higher educational establishments and large hospitals).
 - *Group households:* The City had over five times the NSW percentage with Woollahra, Waverley, Randwick, Leichhardt and North Sydney also having much higher percentages than NSW.
 - *Lone persons:* All the LGAs had higher percentages than NSW with only Marrickville being close to that percentage. The City had two and a half times the NSW percentage followed closely by North Sydney.
 - The City is distinguishable by having a population which included low proportions of married couples, households with children and lone parents but it had high proportions of young adults, defacto couples, group households and lone persons. These characteristics are, no doubt, influenced by it being the home of a large 'gay' community. Nevertheless, they suggest that it may also contain groups who could exhibit higher than normal levels of susceptibility to gaming problems.
- k) **Table 13** (on page 29) sets out the five most frequently mentioned countries of birth as reported in the 2006 Census for each of the 10 LGAs and NSW.
- Not surprisingly, Australia was the most frequently nominated country of birth in all of the LGAs and in NSW. In the City and Waverley, those born in Australia did not constitute the majority and, in Botany Bay, they did so by only a slender margin. All of LGAs had lower percentages of Australian-born than NSW did.
 - England was the second most frequently mentioned country of birth in NSW and in all of the LGAs except Botany Bay (where Bangladesh displaced it) and Marrickville (where Greece was ranked second by a small margin). In all the LGAs, the percentage born in England was higher than in NSW.
 - In the City, China ranked as the third most frequently mentioned country of birth followed by New Zealand and Indonesia but the top five countries only accounted for

- 53.2% of the countries of birth of the total population.
- It is evident that all of the LGAs contain substantial proportions of persons born in many countries. As Table 13 shows, those countries ranked fifth in each LGA accounted for – at the highest – 2.7% of the total, ie, each overseas country contributed a very small proportion of residents.
- l) **Table 14** (on page 29) sets out the distributions of weekly household incomes in the 10 LGAs and NSW as recorded at the 2006 Census.
- **Table 14** shows that, in the City and Botany Bay, there were about the same percentages of households with incomes under \$500/week (18.8% in the City and 22.7% in Botany) as in NSW (20%). In all the other LGAs, those percentages were lower with Mosman recording 8.8%, Woollahra 9% and North Sydney 9.5%.
 - At the higher end of the income scale, the City recorded 42.2% earning over \$1,500/week compared to 31.2% in NSW. Mosman recorded 55.3% and Leichhardt, 53.2%. On the other hand, Botany Bay recorded 28.8% well below Marrickville, the next lowest, with 38.8%.
 - **Table 14** reflects the great range of wealth which occurs across households in the City. It had the highest percentage of very low incomes, a consequence of the large public housing estates it contains in Waterloo, Surry Hills, Glebe and Woolloomooloo as well as in numerous private boarding houses and the like. While not having the highest percentage in the highest income group, it rated well above the NSW level, a consequence of it incorporating areas of marked wealth such as Elizabeth Bay, Potts Point, Pyrmont and like Harbourside areas. Low income has been linked to greater susceptibility to gambling problems.
- m) **Table 15** (on page 30) sets out the median incomes recorded in the 10 LGAs and NSW in 2006.
- **Table 15** shows that nine of the ten LGAs had higher median incomes than NSW did but, in Botany Bay, all the medians were slightly below the NSW levels.
 - In the City, the median weekly income for individuals was 56% above that in NSW but, despite that, it ranked the fourth lowest among the 10 LGAs.
 - The City's median weekly family income was 54% above that in NSW and again it ranked the fourth lowest among the 10 LGAs but its median weekly household income was only 16% above NSW's and it again ranked as the fourth lowest. Its low household income maybe a reflection of the smaller average number of persons per household in the City.
- n) **Table 16** (on page 30) sets out the SEIFA levels for the 10 LGAs. ABS did not provide SEIFA for NSW but, in terms of the SEIFA for disadvantage, NSW level was in the range between 975 and 1000. On that basis, only Botany Bay fell below the NSW level on that index.

Among the 10 LGAs, the City was ranked towards the lower end on each of the SEIFA indices.

7. HOW MUCH OF THEIR INCOMES DID ADULTS SPEND ON EGMS?

Since income data is only available from the 2006 Census, this analysis can only be made for that year.

As **Tables 9** and **10** show, average expenditure per adult on egms has fallen considerably in all of the 10 LGAs examined since 2006 although it has risen in NSW.

Table 17 (on page 30) sets out the estimated average expenditure per adult on egms in each LGA and in NSW in 2006 as a percentage of the annual median household income reported in the 2006 Census for the respective areas. Annual median household income has been calculated by multiplying median weekly household income (as shown in **Table 15**) by 52.

Since average expenditure of egms has fallen but – in broad terms, at least – incomes have risen between 2006 and 2010, the results shown in **Table 17** overstate the current percentages.

The percentage spent by adults resident in the City is much higher than for any of the other nine LGAs or for NSW. One explanation for that is that – as the largest centre of employment and shopping in NSW and as it contains the greatest concentration of the most popular entertainment venues – it attracts expenditure on egms from adults who are not residents of the LGA. The Sebel's clientele surveyed evidence that circumstance. There is no data available by which the contribution of non-residents might be assessed. However, on the basis that the City is said to attract, on average, over half a million workers, shoppers, visitors, students and the like each weekday (ie, roughly three times its total resident population) it would not seem unreasonable to surmise that, say, half the expenditure on egms is made by non-residents. If that were the case, the percentage of income spent on egms in the City would be comparable with the percentages spent by adults in Waverley, Randwick, Botany Bay and Marrickville. That is to be expected as there are no great differences in the characteristics of the populations of those LGAs. However, none of the percentages shown on **Table 17** are “correct” for two reasons –

- i) adults move across LGA boundaries to play egms, eg, while they are working outside the LGA where they reside or if there is a large popular club or hotel just across the boundary such as East Leagues Club in Bondi Junction which probably attracts people living in the Woollahra LGA; and
- ii) there are few households that have median household incomes. Some have much higher incomes but an equal number have lower incomes.

Thus the data in **Table 17** can only be taken to be broadly indicative. It suggests that the average adult in Lane Cove, Mosman and Woollahra spend little on egms. Each of these is an LGA with high median incomes (**Table 15**), high SEIFA (**Table 16**), low densities of egms and low estimated average expenditures on egms. Their populations are well-educated with many employed in higher status occupations. Which characteristics have led to their situations? Are wealthier, better-educated, adults less interested in egms? Do they spend less on all forms of gambling or are their gambling patterns different? Whatever the reason, there appear to be some inferences that can be made for the City.

The City, as an LGA, contains a population whose socio-economic status ranges from the highest to the lowest in our society. The former are those who live on or near the Harbour while the latter include some who live in places such as Redfern and Waterloo as well as the

homeless. Between those extremes, there are adults of every socio-economic status. How much of their incomes any one of them may spend is not known. It seems reasonable to assume that the majority of the adults living in the City are similar in their approaches to spending income on egms as their peers are elsewhere in NSW. That observation needs to be tempered by recognition of the City's atypical household structure and its significant proportion of low income households. These may be associated with higher than average susceptibility to gambling problems.

8. PERCEIVED SOCIAL IMPACTS AND ECONOMIC BENEFITS

An increase of two in the gmt of a hotel with an existing gmt of 15 in an area where there are, literally, hundreds of egms, is unlikely to have any perceptible positive or negative social impact. In this instance, where – if the gmt threshold increase is approved – it is envisaged that that two egm will be moved from the Macquarie Hotel to the Sebel, there is even less likelihoods of any perceptible impact. That is because the egms would be moved some 400 metres, ie, between hotels which serve similar clientele drawn from almost the same area. At the LGA level, there would be no impact. In addition, there would be a decrease of one in the total number of egms in the City and in the number in the area close to the Sebel due to the forfeiture requirements of the legislation.

The negative impact from the two additional machines being sought would be, almost wholly, confined to that on those with gambling problems or who are problem gamblers. At the outset, the licensee is not aware of anyone who plays the egms at the Sebel being a problem gambler, eg, no-one has applied to be excluded from its gaming room and his staff report that no one – at least in recent years – has enquired about assistance with a gambling problem. That is some indication that the Sebel's present gaming clientele may not be prone to problem gambling.

The addition of two egms to its gaming room is not expected to increase the numbers of adults attracted to the Sebel as a whole or to the Townhouse, in particular. What the two additional egms would do is "*relieve the pressure*" on its existing egms at peak times. That is to say, on Thursday and Friday afternoons and at some weekday lunchtimes, when the greater numbers of workers come to the Townhouse and want to play the egms. The 15 egms presently kept cannot meet the demand during some peak periods. The two additional egm would assist in relieving that situation. (As noted in 3(c) above, the gaming room can only accommodate two additional egms.)

If there are any among the Sebel's existing gaming clientele who have, or may be moving towards having, gambling problems, it is unlikely that the additional capacity the two egm would provide would influence them, their behaviours or their progression towards those problems. That is because, outside those peak periods, there are usually egms which are not being played. Players present outside the work-related peak periods, tend to be local residents.

The characteristics of those with gambling problems are said to include that they tend to play frequently and/or for relatively long periods. While workers visiting the Townhouse regularly, may play frequently, the short periods available to workers at lunch times means that they would not be able to play for extended periods. However, some may play for longer periods after finishing work. Such players are almost certainly to play in off-peak as well as in peak periods. If they play at lunchtimes or even after work, they are likely to be among the

first to start to play and the last to stop. When they are likely to start playing, there are currently egms available to play and the addition of two more would make little difference to them accessing machines.

In these circumstances, any negative effects the addition of two egms at the Sebel would appear to be very limited. Moreover, any such effects should be offset by the removal of three egms from the Macquarie Hotel, some 400 metres away.

Similarly, the positive effects of the addition of two egms at the Sebel would be limited, largely, to the benefits it would afford recreational players who – at present – sometimes cannot gain access to an egm when they wish to play, particularly, during lunch times.

At the same time, there appears to be no similar problem at the Macquarie Hotel (which currently has 23 egms and a gmt of 28). That is to say, the loss of three egms from the Macquarie Hotel is not likely to adversely affect the amenity of players at that hotel.

Under Clause 39 (5)(a), an LIA is required to specify “*details of the benefits the venue will provide*”.

The owner of the Sebel recognises that the Authority has a policy of requiring applicants for increases in gmt to offer to make a positive contribution to the local community. The owner is a recognised benefactor of charitable and like organisations. In this instance, it proposes to make a donation of \$50,000 to the NSW University of Technology (which is based less than a kilometre from the Sebel) for educational purposes. That University serves the local community regardless of how it is defined and improvement to it will benefit that community.

9. CONSULTATION

As required by the legislation, when OLGR was requested to supply the gaming data used in this LIA on 1 September 2010, a public notice was placed in *The Sydney Morning Herald* and all entities required to be notified were advised of the request by letters posted on 2 September 2010. Copies of those documents form **Annexure 4**.

The City of Sydney responded on 27 September 2010. It raised no objection to the application. A copy of its letter forms **Annexure 5**.

Ms C Braganza of the Gambling Treatment Centre at the University of Sydney also responded. A copy of her letter is attached as **Annexure 6**.

Subsequent telephone conversations revealed that the Centre was not opposed to the application *per se*.

Arrangements have now been made to meet with the senior personnel of the Centre in mid-January for an exchange of ideas and research with the objective of better defining the Centre’s position, the delay being due to Ms Braganza being on extended leave and other commitments by both parties.

No other entity responded.

TABLES

Table 1: Categorisation by Band of the ten LGAs together with percentage of the total population counted in the 2006 Census who were visitors to the LGA

LGA	Band	% of population at 2006 Census who were "visitors"*
Sydney	3	15.8
Woollahra	1	4.8
Waverley	2	5.2
Randwick	2	4.8
Botany Bay	2	3.5
Leichhardt	1	3.9
Marrickville	2	3.2
Lane Cove	1	4.3
North Sydney	1	6.4
Mosman	1	3.9

* visitors are defined as persons who were counted in the LGA but who lived elsewhere.

Source: Casino Liquor and Gaming Control Authority and ABS.

Table 2: Numbers of entitlements authorised and egms connected to the central monitoring system in clubs at 31 May 2010 and in hotels at 30 June 2010

Area	Hotels			Clubs		
	No. of authorised entitlements	No. egms installed	Difference	No. entitlements	No. installed	Difference
Sydney	3,424	3,655	231	1,748	1,216	-532
Woollahra	220	208	-12	188	169	-19
Waverley	174	218	44	858	517	-341
Randwick	293	365	72	1,354	1,290	-64
Botany Bay	167	174	7	207	200	-7
Leichhardt	423	450	27	262	64	-198
Marrickville	505	565	60	523	363	-160
Lane Cove	21	21	0	92	91	-1
North Sydney	275	301	26	469	382	-87
Mosman	32	32	0	128	120	-8
NSW	21,964	23,640	1,676	76,038	71,275	-4,763

Source: OLGR

Table 3: Numbers of egms in clubs and hotels and in total in the ten LGAs and NSW as at May (for clubs) and as at June (for hotels) 2006 to 2010

Area	No. of egms in:														
	Clubs					Hotels					Totals				
	2006	2007	2008	2009	2010	2006	2007	2008	2009	2010	2006	2007	2008	2009	2010
Sydney ¹	1,659	1,539	1,531	1,461	1,216	3,578	3,618	3,641	3,689	3,655	5,237	5,157	5,172	5,150	4,871
Woollahra	195	182	170	170	169	251	249	240	226	208	446	431	410	396	377
Waverley	731	727	689	671	517	223	225	224	218	218	954	952	913	889	735
Randwick	1,387	1,287	1,353	1,305	1,290	353	362	368	365	365	1,740	1,649	1,721	1,670	1,655
Botany Bay	216	215	207	209	200	172	174	174	174	174	388	389	381	383	374
Marrickville	677	641	488	408	363	571	579	575	565	565	1,248	1,220	1,063	973	928
Leichhardt	244	229	229	214	64	464	466	472	456	450	708	695	701	670	514
Lane Cove	102	102	100	94	91	21	21	21	21	21	123	123	121	115	112
North Sydney	487	456	515	400	382	337	318	320	320	301	824	774	835	720	683
Mosman	126	126	123	123	120	32	32	32	32	32	158	158	155	155	152
Totals	5,824	5,504	5,405	5,055	4,412	6,002	6,044	6,067	6,066	5,989	11,826	11,548	11,472	11,121	10,401
NSW	74,273	73,421	72,819	71,836	71,275	24,053	23,943	23,732	23,769	23,640	98,326	97,364	96,551	95,605	94,915

¹The figures for Sydney and NSW exclude the 1,500 egms installed in Star City Casino.

Source: OLG

Table 4: Total egm expenditures per quarter and annually by calendar year by LGA and in NSW from 2005 to 2009 in current dollars

Year	Qtr	LGAs										NSW
		Sydney	Woollahra	Waverley	Randwick	Botany Bay	Marrickville	Leichhardt	Lane Cove	North Sydney	Mosman	
2005	1	67,083,000	5,487,000	13,768,000	25,919,000	5,250,000	15,577,000	8,982,000	994,000	13,244,000	1,731,000	1,185,080,000
	2	71,350,000	5,733,000	13,838,000	26,467,000	5,464,000	16,268,000	9,753,000	1,047,000	13,752,000	1,924,000	1,216,566,000
	3	76,651,000	6,071,000	13,837,000	27,655,000	5,928,000	17,507,000	10,106,000	1,456,000	14,181,000	1,914,000	1,281,099,000
	4	75,504,000	6,184,000	13,862,000	27,746,000	5,732,000	17,032,000	9,976,000	1,516,000	13,952,000	1,869,000	1,274,113,000
	Total	290,588,000	23,475,000	55,305,000	107,787,000	22,374,000	66,384,000	38,817,000	5,013,000	55,129,000	7,438,000	4,956,858,000
2006	1	71,401,000	5,862,000	13,178,000	26,541,000	5,134,000	16,401,000	9,213,000	1,169,000	13,390,000	1,962,000	1,215,534,000
	2	75,080,000	6,153,000	13,578,000	27,744,000	5,346,000	16,510,000	9,729,000	1,307,000	14,247,000	2,072,000	1,252,867,000
	3	81,016,000	6,359,000	14,522,000	28,909,000	6,029,000	18,282,000	10,246,000	1,382,000	14,873,000	2,076,000	1,338,967,000
	4	79,618,000	6,576,000	14,819,000	28,631,000	5,839,000	17,514,000	9,818,000	1,456,000	14,443,000	2,092,000	1,312,723,000
	Total	307,115,000	24,950,000	56,097,000	111,825,000	22,348,000	68,707,000	39,006,000	5,314,000	56,953,000	8,202,000	5,120,091,000
2007	1	75,156,000	6,087,000	13,992,000	26,385,000	5,427,000	17,013,000	9,243,000	1,218,000	13,262,000	2,002,000	1,255,675,000
	2	78,475,000	6,426,000	14,220,000	26,519,000	5,716,000	17,501,000	10,051,000	1,199,000	13,888,000	2,060,000	1,298,735,000
	3	71,161,000	5,336,000	13,299,000	25,039,000	5,489,000	15,602,000	8,813,000	1,138,000	12,563,000	1,859,000	1,243,514,000
	4	67,258,000	5,166,000	13,133,000	24,228,000	5,205,000	14,972,000	7,986,000	1,109,000	12,211,000	1,653,000	1,172,841,000
	Total	292,050,000	23,015,000	54,644,000	102,171,000	21,837,000	65,088,000	36,093,000	4,664,000	51,924,000	7,574,000	4,970,765,000
2008	1	61,244,000	4,498,000	12,096,000	23,317,000	4,561,000	12,920,000	7,424,000	964,000	11,336,000	1,624,000	1,106,611,000
	2	63,344,000	4,695,000	12,316,000	23,660,000	4,832,000	13,595,000	7,327,000	995,000	11,854,000	1,536,000	1,121,716,000
	3	67,289,000	4,486,000	12,915,000	23,997,000	5,360,000	14,352,000	7,750,000	1,075,000	12,346,000	1,505,000	1,210,785,000
	4	65,593,000	4,790,000	13,055,000	24,556,000	5,105,000	14,326,000	7,659,000	1,079,000	12,105,000	1,418,000	1,195,797,000
	Total	257,470,000	18,469,000	50,382,000	95,530,000	19,858,000	55,193,000	30,160,000	4,113,000	47,641,000	6,083,000	4,634,909,000
2009	1	58,876,000	4,457,000	12,123,000	23,267,000	4,649,000	12,752,000	6,809,000	903,000	10,850,000	1,265,000	1,168,030,000
	2	63,027,000	4,486,000	12,088,000	23,364,000	4,746,000	13,053,000	7,783,000	969,000	10,987,000	1,350,000	1,197,448,000
	3	65,445,000	5,041,000	12,787,000	23,102,000	5,358,000	13,599,000	7,799,000	1,008,000	12,170,000	1,454,000	1,232,180,000
	4	63,958,000	4,946,000	12,767,000	23,895,000	5,101,000	13,275,000	7,400,000	974,000	11,833,000	1,316,000	1,206,028,000
	Total	251,306,000	18,930,000	49,765,000	93,628,000	19,854,000	52,679,000	29,791,000	3,854,000	45,840,000	5,385,000	4,803,686,000

Source: OLGR

Table 5: Total egm expenditures per quarter and annually by calendar year by LGA from 2005 to 2009 in constant dollars

Year	Qtr	LGAs										NSW
		Sydney	Woollahra	Waverley	Randwick	Botany Bay	Marrickville	Leichhardt	LaneCove	North Sydney	Mosman	
2005	1	60,106,000	4,916,000	12,336,000	23,223,000	4,704,000	13,957,000	8,048,000	891,000	11,867,000	1,551,000	1,061,832,000
	2	63,930,000	5,137,000	12,399,000	23,715,000	4,896,000	14,576,000	8,739,000	938,000	12,322,000	1,724,000	1,090,043,000
	3	68,680,000	5,440,000	12,398,000	24,779,000	5,312,000	15,686,000	9,055,000	1,305,000	12,706,000	1,715,000	1,147,865,000
	4	67,652,000	5,541,000	12,420,000	24,860,000	5,136,000	15,260,000	8,939,000	1,359,000	12,501,000	1,675,000	1,141,605,000
	Total	260,368,000	21,034,000	49,553,000	96,577,000	20,048,000	59,479,000	34,781,000	4,493,000	49,396,000	6,665,000	4,441,345,000
2006	1	66,417,000	5,453,000	12,259,000	24,688,000	4,776,000	15,256,000	8,570,000	1,088,000	12,455,000	1,825,000	1,130,690,000
	2	69,840,000	5,723,000	12,630,000	25,808,000	4,973,000	15,358,000	9,050,000	1,216,000	13,252,000	1,927,000	1,165,417,000
	3	75,361,000	5,916,000	13,508,000	26,892,000	5,608,000	17,006,000	9,531,000	1,286,000	13,835,000	1,931,000	1,245,507,000
	4	74,061,000	6,117,000	13,784,000	26,633,000	5,431,000	16,291,000	9,133,000	1,354,000	13,435,000	1,946,000	1,221,095,000
	Total	285,679,000	23,209,000	52,181,000	104,021,000	20,788,000	63,911,000	36,284,000	4,944,000	52,977,000	7,629,000	4,762,709,000
2007	1	71,135,000	5,761,000	13,244,000	24,973,000	5,137,000	16,103,000	8,749,000	1,153,000	12,553,000	1,895,000	1,188,497,000
	2	74,276,000	6,083,000	13,459,000	25,100,000	5,410,000	16,565,000	9,513,000	1,135,000	13,145,000	1,950,000	1,229,252,000
	3	67,353,000	5,051,000	12,587,000	23,699,000	5,196,000	14,768,000	8,341,000	1,077,000	11,891,000	1,760,000	1,176,986,000
	4	63,660,000	4,890,000	12,430,000	22,932,000	4,927,000	14,171,000	7,559,000	1,050,000	11,558,000	1,565,000	1,110,094,000
	Total	276,424,000	21,785,000	51,720,000	96,704,000	20,670,000	61,607,000	34,162,000	4,415,000	49,147,000	7,170,000	4,704,829,000
2008	1	60,436,000	4,438,000	11,936,000	23,009,000	4,497,000	12,749,000	7,326,000	951,000	11,186,000	1,602,000	1,092,004,000
	2	62,508,000	4,633,000	12,153,000	23,348,000	4,764,000	13,416,000	7,231,000	981,000	11,698,000	1,516,000	1,106,909,000
	3	66,401,000	4,427,000	12,745,000	23,680,000	5,285,000	14,163,000	7,648,000	1,061,000	12,183,000	1,485,000	1,194,803,000
	4	64,727,000	4,727,000	12,882,000	24,232,000	5,033,000	14,137,000	7,558,000	1,064,000	11,945,000	1,400,000	1,180,012,000
	Total	254,072,000	18,225,000	49,716,000	94,269,000	19,579,000	54,465,000	29,763,000	4,057,000	47,012,000	6,003,000	4,573,728,000
2009	1	58,876,000	4,457,000	12,123,000	23,267,000	4,649,000	12,752,000	6,809,000	903,000	10,850,000	1,265,000	1,168,030,000
	2	63,027,000	4,486,000	12,088,000	23,364,000	4,746,000	13,053,000	7,783,000	969,000	10,987,000	1,350,000	1,197,448,000
	3	65,445,000	5,041,000	12,787,000	23,102,000	5,358,000	13,599,000	7,799,000	1,008,000	12,170,000	1,454,000	1,232,180,000
	4	63,958,000	4,946,000	12,767,000	23,895,000	5,101,000	13,275,000	7,400,000	974,000	11,833,000	1,316,000	1,206,028,000
	Total	251,306,000	18,930,000	49,765,000	93,628,000	19,854,000	52,679,000	29,791,000	3,854,000	45,840,000	5,385,000	4,803,686,000

Table 6: Total expenditure on egms per annum over the five calendar years from 2005 to 2009

Area	Total egm expenditure by LGA (Constant \$2009)				
	2005	2006	2007	2008	2009
Sydney	260,368,000	285,679,000	276,424,000	254,072,000	251,306,000
Woollahra	21,034,000	23,209,000	21,785,000	18,225,000	18,930,000
Waverley	49,553,000	52,181,000	51,720,000	49,716,000	49,765,000
Randwick	96,577,000	104,021,000	96,704,000	94,269,000	93,628,000
Botany Bay	20,048,000	20,788,000	20,670,000	19,579,000	19,854,000
Marrickville	59,479,000	63,911,000	61,607,000	54,465,000	52,679,000
Leichhardt	34,781,000	36,284,000	34,162,000	29,763,000	29,791,000
Lane Cove	4,493,000	4,944,000	4,415,000	4,057,000	3,854,000
North Sydney	49,396,000	52,977,000	49,147,000	47,012,000	45,840,000
Mosman	6,665,000	7,629,000	7,170,000	6,003,000	5,385,000
Total	602,394,000	651,623,000	623,804,000	577,161,000	571,032,000
NSW	4,441,345,000	4,762,709,000	4,704,829,000	4,573,728,000	4,803,686,000

Table 7: Adult populations and estimated adult populations* by LGA at the 2001 Census, 2006 Census and the ABS's estimated adult populations for 2005, 2006 and 2007 and projections thereof

Area	2001 Census	2006 Census	2005	2006	2007	2008	2009	2010
Sydney	102,640	142,953	145,581	151,696	155,480	159,000	162,500	166,000
Woollahra	41,697	41,142	43,987	44,113	44,211	44,300	44,400	44,500
Waverley	49,610	50,594	53,671	54,323	54,862	55,400	55,900	56,400
Randwick	97,942	99,111	104,132	104,693	105,818	106,900	108,000	109,100
Botany Bay	27,633	28,173	29,503	29,642	29,830	30,000	30,200	30,400
Marrickville	60,604	60,185	63,179	63,612	64,145	64,600	65,150	65,700
Leichhardt	52,041	40,783	43,274	43,379	43,800	44,150	44,500	45,000
Lane Cove	23,932	23,677	25,029	24,870	24,918	24,960	25,000	25,000
North Sydney	48,703	51,649	54,530	55,123	55,357	55,600	55,900	56,200
Mosman	20,782	20,885	22,239	22,244	22,318	22,400	22,500	22,600
Total	525,584	559,152	585,125	593,695	600,739	607,310	614,050	620,900

*Adult population is the population aged 18 years and over.

Sources: ABS, OLGR and DC.

Table 8: EGM densities (number of egms per 1000 adults) by LGA for the last five years (as at May/June each year)

Area	No. of egms per 1000 adults				
	2006	2007	2008	2009	2010
Sydney	34	33	33	33	31
Woollahra	10	10	9	9	9
Waverley	18	17	17	16	13
Randwick	16	16	16	16	16
Botany Bay	13	13	13	13	12
Marrickville	20	19	17	15	15
Leichhardt	16	16	16	15	12
Lane Cove	5	5	5	5	4
North Sydney	15	14	15	13	12
Mosman	7	7	7	7	7
NSW	19	18	18	18	18

Table 8A: Egm densities by LGA for the years 2008, 2009 and 2010 based on Tables 3 and 7

Area	No. of egms per 1000 adults		
	2008	2009	2010
Sydney	33	32	29
Woollahra	9	9	8
Waverly	17	16	13
Randwick	16	15	15
Botany Bay	13	13	12
Marrickville	16	15	14
Leichhardt	16	15	11
Lane Cove	5	5	5
North Sydney	15	13	12
Mosman	7	7	7

Table 9: Estimated average annual expenditure per adult on egms (constant \$2009)*

Area	Average Annual Expenditure per adult in constant dollars (\$2009)				
	2,005	2,006	2,007	2,008	2,009
Sydney	1,788	1,883	1,778	1,634	1,616
Woollahra	478	526	469	412	426
Waverley	923	961	943	906	847
Botany Bay	680	701	693	653	657
Randwick	927	994	914	891	885
Marrickville	941	1,005	960	772	821
Leichhardt	804	836	780	680	680
Lane Cove	179	199	177	163	155
North Sydney	906	961	888	849	832
Mosman	300	343	321	269	241
NSW	862	915	892	867	911

* As the adult populations between 2006 and 2009 are estimates, there is the potential for the expenditures shown for those years to be imprecise.

Table 10: Percentages change in average annual expenditure per adult on egms by LGA, 2005 to 2009

Area	%
Sydney	(-) 9.6
Woollahra	(-) 10.9
Waverley	(-) 8.2
Randwick	(-) 4.5
Botany Bay	(-) 3.3
Marrickville	(-) 12.8
Leichhardt	(-) 15.6
Lane Cove	(-) 13.4
North Sydney	(-) 8.2
Mosman	(-) 19.7
NSW	(+) 5.7

Table 11: Average annual expenditure per EGM by LGA, 2005-2009 (constant \$2009)

Area	Average Annual Expenditure per EGM in constant dollars (\$2009)				
	2005	2006	2007	2008	2009
Sydney	48,443	54,615	53,307	48,999	49,300
Woollahra	46,561	52,243	48,468	44,752	48,160
Waverley	50,746	54,755	55,198	54,483	54,973
Randwick	54,325	59,730	58,300	55,517	56,284
Botany Bay	51,635	53,647	53,687	51,431	52,421
Marrickville	44,881	51,355	50,873	46,884	53,536
Leichhardt	46,780	51,284	48,750	43,465	44,413
Lane Cove	36,745	39,950	35,825	33,544	33,944
North Sydney	59,442	65,343	61,394	57,209	65,490
Mosman	42,178	48,289	45,592	38,728	34,913
NSW	44,967	48,512	48,289	47,417	50,312

Table 12: Selected characteristics of the populations of LGAs and NSW at the 2006 Census (Percentages rounded to the nearest whole number)

Characteristic	LGA																		NSW			
	Sydney		Woollahra		Waverley		Randwick		Botany Bay		Marrickville		Leichhardt		Lane Cove		North Sydney				Mosman	
Total Resident Population	157,874	%	50,490	%	61,212	%	121,036	%	35,993	%	72,256	%	49,057	%	30,553	%	58,580	%	26,390	%	6,528,689	%
No. of persons aged: 18-24	25,503	16	3,852	8	4,986	8	15,829	13	3,371	9	6,932	10	3,474	7	2,485	8	5,161	9	1,776	7	601,454	9
No. of persons aged: 60 years and over	18,106	11	10,786	21	10,332	17	20,878	17	6,937	19	10,348	14	6,776	14	5,437	18	9,954	17	5,566	21	1,223,400	19
No. of persons of indigenous origin	1,981	1	99	0	195	0	1,474	1	632	2	1,078	1	409	1	62	0	110	0	26	0	138,507	2
No. of persons who did not complete Year 12 in High School	23,450	15	7,039	14	10,207	17	28,361	23	2,312	42	19,048	26	10,244	21	5,668	19	8,562	15	4,259	16	2,487,712	38
No. of persons employed as : Labourers	3,320	2	448	1	1,140	2	3,166	3	1,910	12	2,621	4	870	2	476	2	723	1	256	1	277,549	4
No. of persons employed as: Administrative and support services	10,859	7	3,201	6	3,938	6	9,518	8	3,011	18	5,927	8	3,832	8	2,418	8	5,127	9	1,823	7	447,950	7
Percentage of the population aged 15 or over unemployed	4,311	5	710	3	1,083	4	2,763	5	936	5	2,035	5	939	3	485	3	1,065	3	358	3	183,157	6
Relationship in Household																						
Husband or wife in registered marriage	24,528	22	15,475	37	16,143	33	35,806	34	13,110	36	25,224	42	14,165	33	11,258	41	16,578	33	9,628	41	2,394,428	40
Partner in de facto marriage	18,318	16	3,878	9	5,361	11	8,505	8	1,677	5	4,155	7	6,021	14	1,700	6	6,541	13	1,666	7	364,903	6
Lone parent	3,350	3	1,331	3	1,705	4	4,399	4	1,745	5	2,151	4	1,609	4	865	3	1,448	3	682	3	275,800	5
Child under 15	8,046	7	6,013	14	7,134	14	15,639	15	6,057	17	9,948	17	6,351	15	5,059	19	4,905	10	4,188	18	1,215,947	20
Dependent student (15-24 years)	2,158	2	2,075	5	1,998	4	4,565	4	1,552	4	2,910	5	1,324	3	1,576	6	1,402	3	1,392	6	303,887	5
Non-dependent child)	3,100	3	1,699	4	2,087	4	6,436	6	2,888	8	4,220	7	1,819	4	1,305	5	1,501	3	882	4	414,436	7
Other related individual	4,185	4	782	2	1,082	2	3,875	4	1,215	3	1,656	3	1,009	2	638	2	1,250	3	312	1	136,365	2
Unrelated individual living in family household	2,344	2	304	1	491	1	1,319	1	328	1	492	1	419	1	195	1	383	1	116	1	50,002	1
Group household member	18,548	16	2,834	7	4,583	9	9,194	9	1,139	3	2,466	4	3,184	7	1,103	4	4,289	9	673	3	180,733	3
Lone person	25,451	23	6,775	16	7,776	16	13,211	13	3,424	10	6,038	10	6,526	15	3,296	12	10,804	22	3,540	15	571,653	9
Visitor (from within Australia)	2,997	3	742	2	1,095	2	1,888	2	435	1	874	2	918		405	2	950	2	382	2	119,515	2

Source: 2006 Census

Table 13: The five most-common countries of birth in the ten LGAs and NSW from 2006 Census

LGA	Ranking in Percentages of total enumerated population									
	1		2		3		4		5	
	Country	%	Country	%	Country	%	Country	%	Country	%
Sydney	Australia	40.5	England	4.2	China	3.5	New Zealand	3.0	Indonesia	2.0
Woollahra	Australia	55.9	England	6.2	South Africa	3.4	New Zealand	2.8	USA	1.4
Waverley	Australia	48.3	England	5.7	South Africa	4.0	New Zealand	3.0	Ireland	1.3
Randwick	Australia	54.7	England	4.1	China	2.9	New Zealand	2.3	Indonesia	2.2
Botany Bay	Australia	50.5	Bangladesh	3.0	Greece	2.8	New Zealand	2.6	China	2.5
Marrickville	Australia	55.3	Greece	3.6	England	3.4	Vietnam	3.3	New Zealand	2.7
Leichhardt	Australia	63.8	England	6.9	New Zealand	3.3	Italy	2.1	Ireland	0.9
Lane Cove	Australia	63.1	England	4.8	New Zealand	2.5	China	2.3	India	1.4
North Sydney	Australia	55.4	England	6.8	New Zealand	3.6	Japan	1.9	China	1.7
Mosman	Australia	62.2	England	8.8	New Zealand	3.0	USA	1.8	South Africa	1.6
NSW	Australia	69.0	England	3.2	China	1.7	New Zealand	1.6	Vietnam	0.9

Source: 2006 Census

Table 14: Weekly household income distribution by LGA and NSW at the 2006 Census

Income range in \$2006	LGAs										NSW %
	Sydney %	Woollahra %	Waverley %	Randwick %	Botany Bay %	Marrickville %	Leichhardt %	Lane Cove %	North Sydney %	Mosman %	
<\$249	11.4	4.6	6.5	9.1	10.7	7.0	6.1	4.7	5.0	4.5	7.9
250-499	7.4	4.4	6.9	8.6	12.0	9.0	6.4	5.7	4.5	4.3	12.1
500-799	11.4	9.3	11.9	12.3	14.8	13.6	9.5	9.9	9.5	9.6	16.0
800-999	6.0	5.0	5.7	6.0	6.9	7.1	4.8	4.8	5.4	5.3	6.5
1,000-1,399	12.1	9.6	11.9	12.9	15.3	28.1	10.5	11.4	11.4	10.2	15.0
1,400-1,999	14.1	12.2	13.4	13.8	12.8	15.1	13.9	14.4	15.6	12.7	13.1
>\$2,000	28.1	41.8	31.6	25.8	16.0	23.7	39.3	38.0	39.5	42.6	18.1
Partial income stated / All incomes not stated	9.7	13.1	12.2	11.4	11.7	10.0	9.7	10.9	9.0	11.2	11.2

Source: 2006 Census

Table 15: Median incomes in the LGAs and NSW from 2006 Census (in 2006 dollars)

LGA	Median weekly income of:		
	Individuals	Families	Households
Sydney	717	1,819	1,204
Woollahra	976	2,654	1,917
Waverley	765	1,928	1,446
Randwick	593	1,579	1,185
Botany Bay	453	1,166	995
Marrickville	595	1,460	1,160
Leichhardt	895	2,307	1,733
Lane Cove	811	2,295	1,729
North Sydney	1,010	2,510	1,772
Mosman	969	2,675	1,916
NSW	461	1,181	1,036

Source: 2006 Census

Table 16: SEIFAs for the ten LGAs (2006 Census)

	SEIFA			
	Advantage and	Disadvantage	Economic	Education &
Sydney	1111 (7)*	1027 (8)*	976 (10)*	1160 (7)*
Woollahra	1191 (2)	1122 (2)	1116 (2)	1208 (3)
Waverley	1145 (6)	1082 (6)	1062 (6)	1164 (6)
Randwick	1100 (8)	1045 (7)	1036 (7)	1110 (8)
Botany Bay	987 (10)	962 (10)	977 (9)	962 (10)
Marrickville	1065 (9)	1007 (9)	998 (8)	1092 (9)
Leichhardt	1149 (5)	1083 (5)	1070 (5)	1176 (5)
Lane Cove	1173 (4)	1117 (3)	1108 (3)	1188 (4)
North Sydney	1184 (3)	1114 (4)	1073 (4)	1217 (1)
Mosman	1198 (1)	1130 (1)	1128 (1)	1213 (2)

* The numbers in parenthesis give the rankings of each LGA in the column.

Source: ABS

Table 17: Estimated average annual expenditure per adult on egms in 2006 as a percentage of the annual median household income for each LGA and NSW

LGA	%
Sydney	3.23
Woollahra	0.57
Waverley	1.37
Randwick	1.73
Botany Bay	1.46
Marrickville	1.79
Leichhardt	1.00
Lane Cove	0.24
North Sydney	1.12
Mosman	0.37
NSW	1.83