



**Australian Government**

**Department of Infrastructure, Transport,  
Regional Development, Communications, Sport and the Arts**

# Wagering Advertising Reform

## Impact Analysis

April 2026



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# Introduction

The Australian Government is committed to guaranteeing online gambling takes place under a robust legislative framework with strong consumer protections.

On 28 June 2023, the House of Representatives Standing Committee on Social Policy and Legal Affairs released its final report from the Inquiry into online gambling and its impacts on those experiencing gambling harm ([Online Gambling Inquiry](#)).

The Committee made 31 recommendations around consistent national consumer protections, online gambling regulation, research and data, illegal offshore gambling, and simulated gambling games. There are 2 recommendations that seek increased restrictions for wagering advertising<sup>1</sup>.

## Online Gambling Inquiry – Wagering Advertising Recommendations

**Recommendation 16** – The Committee recommends that the Australian Government prohibit all online gambling inducements and inducement advertising, and that it do so without delay.

**Recommendation 26** – The Australian Government, with the cooperation of the states and territories, implement a comprehensive ban on all forms of advertising for online gambling, to be introduced in four phases, over three years, commencing immediately:

- Phase 1 – Prohibition of all online gambling inducements and inducement advertising; prohibition of all advertising of online gambling on social media and online platforms; removal of the exemption for advertising online gambling during news and current affairs broadcasts for commercial television; and prohibition of advertising online gambling on commercial radio between 8:30 am to 9:00 am and 3:30 pm to 4:00 pm (school drop off and pick up).
- Phase 2 – Prohibition of all online gambling advertising and commentary on odds, during and an hour either side of a sports broadcast; and prohibition on all in-stadia advertising, including logos on players' uniforms.
- Phase 3 – Prohibition of all broadcast online gambling advertising between the hours of 6.00am and 10.00pm.
- Phase 4 – By the end of year three, prohibition on all online gambling advertising and sponsorship.

In line with its terms of reference, the Committee applied a public health lens in its inquiry into the impacts of online gambling. With respect to its wagering advertising recommendations, the inquiry did not comprehensively consider or assess the commercial implications associated with its recommended approach. This document assesses the financial and regulatory impacts of the Online Gambling Inquiry's recommendations, including with respect to unintended consequences of reform.

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<sup>1</sup> For the avoidance of doubt, this document uses the term wagering advertising while the Online Gambling Inquiry referred to "online gambling". These are synonymous in this case, with the Online Gambling Inquiry exempting advertising for lotteries from its recommendations.

# Policy problem

In considering the response to the Online Gambling Inquiry, the department has identified 4 broad policy problems:

- Gambling harm is increasing and represents a significant public health concern.
- Wagering advertising is contributing to the normalisation of wagering activities among children and young people.
- Existing wagering advertising restrictions have not kept pace with community expectations.
- There are significant commercial implications associated with wagering advertising reform, and it is imperative any reforms do not jeopardise the continued provision of public interest journalism and grassroots sports.

## Gambling harm is increasing and represents a significant public health concern

In 2023-24, Australians lost approximately \$32.2 billion on legal forms of gambling, representing the highest losses per capita in the world of around \$1,521.<sup>2</sup> Total losses have increased by around 26% since 2018-19 (when losses totalled \$25.6 billion).

While gaming (\$19.8 billion) and lotteries (\$4 billion) account for around 74% of total losses, wagering (including betting on sports and racing) is increasingly responsible for gambling losses. In 2023-24, wagering accounted for \$8.4 billion (26%) of total losses, up from \$3 billion (16%) in 2010-11.<sup>3</sup>

**Table 1: Share of gambling losses by year**

	2010-11		2018-19		2023-24	
	\$	%	\$	%	\$	%
<b>Gaming (total)</b>	\$14.3 billion	74%	\$17.6 billion	69%	\$19.8 billion	62%
<b>Wagering (total)</b>	\$3.0 billion	16%	\$5.0 billion	20%	\$8.4 billion	26%
<b>Lotteries (total)</b>	\$2.1 billion	11%	\$2.9 billion	12%	\$4.0 billion	12%
<b>Total</b>	\$19.4 billion	100%	\$25.6 billion	100%	\$32.2 billion	100%

It is clear the potential for harm has increased with the proliferation of online wagering services, which have fundamentally changed the way that people bet.

Gambling prevalence data published by the Australian Gambling Research Centre in 2025 found that 65% of Australian adults had gambled at least once in the past 12 months, up from 57% in 2019. Wagering is also significantly popular in Australia, with 17.8% of Australian adults having bet on racing and 12.5% on sports in

<sup>2</sup> Queensland Government Statistician's Office, [Australian Gambling Statistics, 40<sup>th</sup> edition, 1998–99 to 2023–24](#), Queensland Treasury, Queensland Government, 2025.

<sup>3</sup> Queensland Government Statistician's Office, [Australian Gambling Statistics, 40<sup>th</sup> edition, 1998–99 to 2023–24](#).

the past 12 months. This report also found that those at risk of gambling harm increased from 11% of Australians to 15% between 2019 and 2024.<sup>4</sup>

Similar research published by the Australian National University (ANU) found that 33% of the Australian adult population (approximately 7 million) had gambled online in the past 12 months.<sup>5</sup> Further, the ANU research found that 88.5% of people who bet on sports did so online.

Research from the Australian Institute of Family Studies (AIFS) in 2025 found that for those Australian adults who regularly bet online on sports or races (at least monthly), more than 70% are experiencing, or are at risk of experiencing, gambling harm.<sup>6</sup> The 18-34 age group is at particular risk, with the highest proportion of those gambling at moderate and high-risk levels. Only 5% of this total at-risk group sought help for gambling in the past 12 months.

Similarly, Roy Morgan data shows that the number of Australians who bet on sport doubled between 2019 and 2024 and that 10% of those who bet on sports were classified as problem gamblers and a further 17% were classified as moderate risk.<sup>7</sup> Additionally, 34% of the total dollars spent on sports betting in Australia comes from persons experiencing gambling harm, despite them representing only 10% of the player base.<sup>8</sup>

Evidence indicates that repeated gambling can cause fundamental changes to areas of the brain related to learning, stress management and rewards processing, similar to those observed in substance addictions,<sup>9</sup> and can be linked with severe physiological and mental health impacts, including increased rates of suicidality.<sup>10</sup>

The impact of someone's gambling does not stop at just them – it also affects their family, friends and communities. An individual's gambling typically impacts up to 6 affected others for problem gamblers, up to 3 others for moderate risk gamblers, and one other person for low risk gamblers.<sup>11</sup> A report by the ANU found that 5.9% reported being personally affected by another person's gambling.<sup>12</sup>

The consequences of the prevalence of gambling related harm has a significant impact on Australia's health system. While data on gambling harms is not collected at a national level, some states and territories have collected and published data for their jurisdictions.

For example, the Victorian Department of Justice and Community Safety released a report in June 2025 that found the social cost of gambling in Victoria was estimated to be \$14.1 billion in 2022-23.<sup>13</sup> This is more than double the previous estimate of \$7 billion in 2014-15.<sup>14</sup> These figures account for adverse financial, emotional and psychological costs, relationship and family impacts, and productivity loss.

Separate research commissioned by the department from the AGRC estimated a national figure for the total cost of wagering in Australia based on the above Victorian figure from 2014-15, and broken down into various

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<sup>4</sup> G Tillman, R Irving, S Wickramasinghe, T Pappu, M Budinski, N Greer, B Whitlock and K Sakata, [National Gambling Prevalence Study Pilot 2024: Key findings](#), Australian Gambling Research Centre, Australian Institute of Family Studies, Australian Government, 2025.

<sup>5</sup> A Suomi, M Hahn and N Biddle, [Gambling participation in Australia 2024: Trends over time, and profiles associated with online gambling](#), POLIS: The Centre for Social Policy Research, Australian National University, 2024, p 15.

<sup>6</sup> [National Gambling Prevalence Study Pilot 2024 | Australian Institute of Family Studies](#)

<sup>7</sup> Roy Morgan Single Source Survey, reported in P Karp and J Butler, ['A third of Australian bets found to be placed by problem gamblers amid warning of 'predatory' industry'](#), The Guardian, 25 June 2024

<sup>8</sup> Roy Morgan Single Source Survey, reported in P Karp and J Butler, ['A third of Australian bets found to be placed by problem gamblers amid warning of 'predatory' industry'](#), The Guardian, 25 June 2024

<sup>9</sup> BJ Sahakian, C Langley, H Bowden-Jones and S Chamberlain, ['Gambling: What Happens in the Brain When We Get Hooked – and How to Regain Control'](#), *The Conversation*, 16 February 2022.

<sup>10</sup> Healthdirect Australia, [Gambling Addiction](#), Healthdirect website, 2024.

<sup>11</sup> N Hing, AMT Russell, M Browne, M Rockloff, C Tulloch, V Rawat, N Geer, NA Dowling, SS Merkouris, DL King, M Stevens, AH Salonen, H Breen and L Woo, ['Gambling-Related Harms to Concerned Significant Others: A National Australian Prevalence Study'](#), *Journal of Behavioural Addictions*, 2022, 11(2):361–372, doi: 10.1556/2006.2022.00045.

<sup>12</sup> A Suomi, M Hahn and N Biddle, [Gambling participation in Australia 2025: Trends over time, and profiles associated with online gambling and gambling harm](#), POLIS: The Centre for Social Policy Research, Australian National University, 2025, p 15.

<sup>13</sup> M Browne, C Tulloch, V Rawat, G Dellosa, AMT Russell, N Hing, M Rockloff and C Doran, [Social costs of gambling to Victoria 2023](#), Department of Justice and Community Safety, State Government of Victoria, 2025.

<sup>14</sup> Browne et al., [Social costs of gambling to Victoria 2023](#).

harm categories. This research estimates the total cost of wagering in Australia for 2023 to be \$26.8 billion.<sup>15</sup> This includes \$4.9 billion in psychological harm, \$8.2 billion in health harms and \$5.6 billion in relationship harms. The full breakdown of wagering harm categories is included in Table 13.

Gambling harm also has a significant impact on domestic and family violence, with studies consistently pointing to an increase in both victimisation and perpetration amongst those experiencing gambling harm. Those at moderate risk of experiencing gambling harm have been found to have a 2.73-fold increase in the odds of experiencing family violence victimisation, and a 2.56-fold increase in the odds of experiencing family violence perpetration.<sup>16</sup> National prevalence research from the AGRC found that 19% of respondents experienced intimate partner violence from a current partner who gambled weekly or more.<sup>17</sup> This is consistent across other studies that have found individuals experiencing gambling harm perpetrate family or domestic violence at rates roughly 10% higher than non-problem gamblers.<sup>18</sup>

## Wagering advertising is contributing to the normalisation of wagering activities among children and young people

Advertising is highly effective in raising awareness for brands and products, and has demonstrated success in converting non-users to users of these brands and products. Wagering advertisements are no different.

AIFS research has found that exposure to wagering advertising had the greatest impact on betting behaviour among young people (aged 18-34) and people at-risk of gambling harm.<sup>19</sup> Exposure to wagering advertising across any platforms prompted half of those at risk of harm to increase their betting, 28% to change what they bet on or try a new form of betting, and 29% to bet on impulse.<sup>20</sup>

Wagering advertising is a key influence on youth to initiate wagering. Research published in the Australian and New Zealand Journal of Public Health found that Australian children aged between 8 and 16 years old could recall wagering advertising in detail, had learned how to place a bet, and could recall betting specific technical language.<sup>21</sup>

Other studies interviewing young people aged 11 to 16 years old found that 23% of respondents intended to gamble when they turned 18, with boys (33.3%) demonstrating significantly higher intentions to gamble than girls (6.7%).<sup>22</sup>

Research by AIFS highlights that the current volume of wagering advertisements is leading to the normalisation of wagering activities, and an association with live sporting events. 69% of respondents agreed wagering advertising makes betting seem like a normal part of sport, 53% thought it normalised gambling

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<sup>15</sup> AGRC research commissioned by the Department of Infrastructure, Transport, Regional Development, Communications, Sport and the Arts, see summary at Appendix D.

<sup>16</sup> NA Dowling, C Ewin, GJ Youssef, SS Merkouris, A Suomi, SA Thomas and AC Jackson, [‘Problem gambling and family violence: Findings from a population-representative study’](#), *Journal of Behavioural Addictions*, 2018, 7(3):806-813, doi:10.1556/2006.7.2018.74.

<sup>17</sup> Tillman et al., National Gambling Prevalence Study Pilot 2024: Key findings, p 3.

<sup>18</sup> N Hing, C O’Mullan, L Mainey, N Greer and H Breen, [‘An integrative review of research on gambling and domestic and family violence: Fresh perspectives to guide future research’](#), *Frontiers in Psychology*, 2022, 13: 987379, doi:10.3389/fpsyg.2022.987379.

<sup>19</sup> R Jenkinson, CM Boyle, K Sakata, N Greer, U Jatkar and B Vandenberg, [‘Exposure and Impact of Sports and Race Betting Advertising in Australia’](#), Australian Gambling Research Centre, Australian Institute of Family Studies, Australian Government, 2023.

<sup>20</sup> Jenkinson et al., *Exposure and Impact of Sports and Race Betting Advertising in Australia*.

<sup>21</sup> H Pitt, SL Thomas, A Bestman, M Stoneham and M Daube, [‘“It’s Just Everywhere!” Children and Parents Discuss the Marketing of Sports Wagering in Australia’](#), *Australian and New Zealand Journal of Public Health*, 2016, 40(5):483–485, doi:10.1111/1753-6405.12564.

<sup>22</sup> C Nyemcsok, SL Thomas, A Bestman, H Pitt, M Daube and R Cassidy, [‘Young People’s Recall and Perceptions of Gambling Advertising and Intentions to Gamble on Sport’](#), *Journal of Behavioural Addictions*, 2018, 7(4):1068–78, doi:10.1556/2006.7.2018.128.

among children, 60% felt it made sport less family friendly, and 46% found that it decreased their enjoyment of sport.<sup>23</sup>

The NSW Youth Gambling Study 2022 found that children aged 12 to 14 years old were most likely to come across wagering promotional content on television and radio (83%) and social media (83%), while children aged 15 to 17 were more likely to be exposed on social media (74%) and phone apps (74%).<sup>24</sup>

## Existing wagering advertising restrictions have not kept pace with community expectations

There is widespread concern across the community about the volume of wagering advertising in Australia, particularly during children and family programming and during live sporting events. The Online Gambling Inquiry found that the existing wagering advertising rules “do not appropriately reflect its potential for harm and are clearly not meeting community expectations”.<sup>25</sup> The existing rules are outlined at Appendix C.

The department’s analysis of Nielsen Ad Intel data shows there was a total of 2.9 million wagering advertisements shown on commercial television between 2017 and 2024, with most concentrated around sports and family programming.

Nielsen Ad Intel data also shows that the volume of wagering advertising decreased significantly between 2022 and 2024, down 53% on commercial television and 37% on metropolitan radio. The volume of wagering advertising impressions on online platforms has also decreased by 51% between 2022 and 2024 (from 7.2 billion to 3.5 billion).

**Table 2: Nielsen – Volume of wagering advertising (millions)**

	2018	2022	2024
<b>Television</b>	0.350	0.534	0.251
<b>Radio</b>	0.10	0.07	0.04
<b>Online</b>	-	7,250.00	3,530.00

Table notes

1. Television figures includes all free-to-air channels in metropolitan and regional areas (including SBS). Does not include advertisements shown on associated streaming services (e.g. 7plus or 9Now) or subscription television services such as Foxtel.
2. Radio figures only include metropolitan AM and FM radio stations (including commercial broadcasters and narrowcasters). Nielsen does not collect data on regional stations.
3. Online figures cover general display (e.g. static banner ads on websites) and social media (e.g. Facebook and Instagram). It does not capture all platforms. Representative data is not available from 2018.

Despite this reduction, the Australian community remains concerned about the amount of wagering advertising. Ad Standards recently released Community Sentiment Tracker, conducted by Roy Morgan, found that gambling advertising remains the leading issue of advertising concern for Australians (67%), far beyond any other category.<sup>26</sup> Similarly, the Australian Communications and Media Authority (ACMA) noted that the recently concluded review of the Commercial Television Code of Practice highlighted significant community

<sup>23</sup> R Jenkinson, CM Boyle, K Sakata, N Greer, U Jatkar and B Vandenberg, [Community attitudes towards sports and race betting advertising in Australia](#), Australian Gambling Research Centre, Australian Institute of Family Studies, Australian Government, 2023, p 3.

<sup>24</sup> N Hing, L Lole, H Thorne, M Rockloff, K Sproston, F Le Guyader, N Hodge and L Sellers, [NSW Youth Gambling Study 2022: Qualitative Research Report](#), Office of Responsible Gambling, NSW Government, 2022, p 49.

<sup>25</sup> Standing Committee on Social Policy and Legal Affairs, [You win some, you lose more: Online gambling and its impacts on those experiencing](#), Parliament of Australia, 2023, p 125.

<sup>26</sup> Ad Standards, Roy Morgan, [Ad Standards Community Sentiment Tracker Report – Q2 FY26](#), 2026

concern regarding wagering advertising on commercial television.<sup>27</sup> These concerns are focused on exposure during children and family programming, and exposure during live sporting events.

Additionally, there are concerns that this reduction in wagering advertising could be reversed once the government announces its response to the Online Gambling Inquiry. As outlined below, the wagering sector has voluntarily reduced the volume and saturation of wagering advertising on television and radio while it awaits the government’s response.

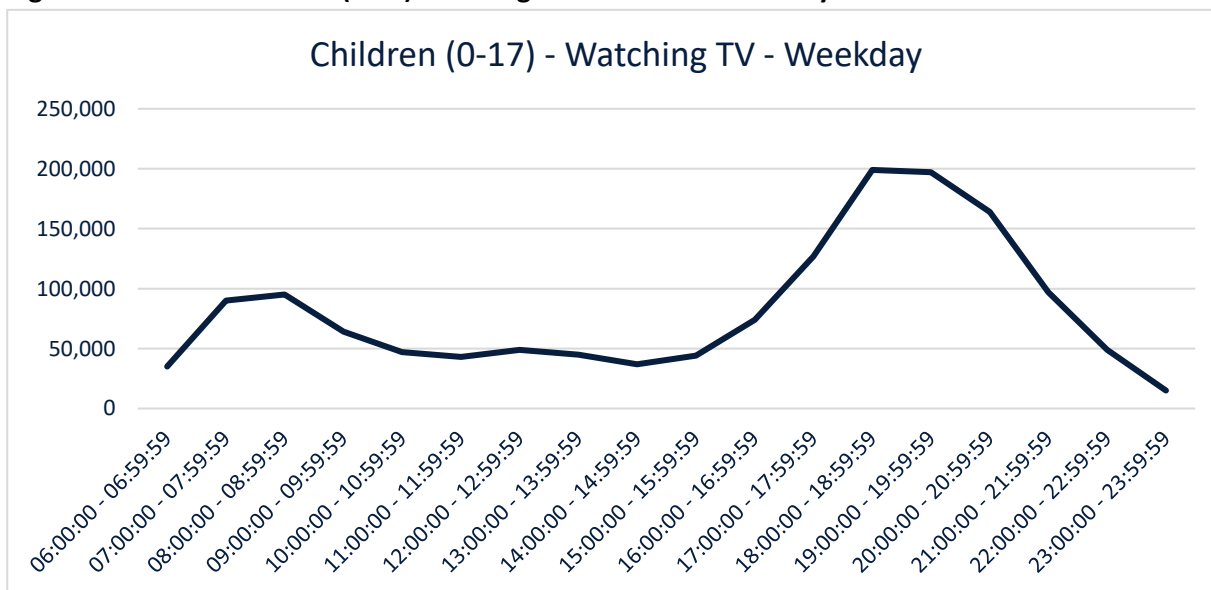
## Exposure during children and family programming

A key focus of the current wagering advertising rules is to prohibit wagering advertisements during children’s television programs.

This works well for younger children who primarily watch programs which are rated G or lower. However, the current wagering advertising rules fail to account for children, particularly teens, who are watching programs rated PG and above that may not be specific programs for children but which may hold significant appeal to such audiences. This includes popular family programs such as MasterChef and Lego Masters as well as popular shows such as The Office, Friends, and Seinfeld<sup>28</sup>. These programs can currently be subject to a high number of wagering advertisements.

Data obtained from OzTAM shows nearly 200,000 children are watching metropolitan television across Australia between 6:00 pm and 8:00 pm on a typical weekday.<sup>29</sup> The children audience starts to significantly decline around the 8:30pm watershed.

**Figure 1: OzTam – Children (0-17) watching television on a weekday**



## Live sporting events

Another key focus of the existing restrictions is to limit wagering advertising during live sporting events. These rules apply to all sporting events on broadcasting and streaming services. However, these restrictions have had an unintended outcome.

<sup>27</sup> Australian Communications and Media Authority (ACMA), [ACMA decision on revised Commercial Television Industry Code of Practice](#), ACMA webpage, 2025.

<sup>28</sup> Free TV has provided confidential data to the department on percentage of audience under 18 for several popular family programs which demonstrate a significant child audience for the shows listed.

<sup>29</sup> Department’s analysis of OzTAM data, provided in 2023.

Following commencement of the current live sporting event restrictions, the ACMA research found that despite effectively reducing advertisements during the specified periods and programming, the restrictions led to an increase in advertisements during other periods.<sup>30</sup>

For example, the ACMA found there was a 96% reduction in gambling advertisements broadcast between 5:00 am and 8:30 pm on metropolitan television during the 2019 Australian Open tennis tournament (compared to the 2018 event). However, the ACMA’s research found a 131% increase in gambling advertising spots after the 8:30 pm watershed (the identified time when the rules change) on metropolitan television during the 2018 AFL home and away season (compared to the 2017 season). The ACMA also found there was a 50% increase in total volume across television and radio between 2016-17 and 2018-19. This has contributed to the normalisation of wagering activities among children and young people.

The live sporting event restrictions have also been ineffective in preventing the normalisation of wagering in sport, with sports fans continuing to see a relatively large number of wagering advertisements before, during and after live sporting events on commercial television (see Table 3).

**Table 3: Cameo of wagering advertising during live sporting events in 2024**

	NRL State of Origin Game 1 Channel 9 Sydney	AFL Round 1 – Richmond vs Carlton Channel 7 Melbourne	AFL Grand Final – Brisbane vs Sydney Channel 7 Brisbane	NRL Grand Final – Panthers vs Storm Channel 9 Brisbane
<b>60 minutes before</b>	5	6	2	2
<b>During play</b>	1	2	0	1
<b>60 minutes after</b>	3	0	2	2
<b>Total</b>	9	8	4	5

Note that these figures do not count on-screen advertising (such as banner advertisements), sponsored segments or advertising on player jerseys and around the ground signage.

Research commissioned by Free TV Australia found that 92% of wagering advertising exposure during a sample of AFL and NRL games in 2023 came from sources located in the stadium/venue, with broadcast advertising accounting for just 8% of total exposure.<sup>31</sup> Note that Free TV’s research excludes pre- and post-game exposure, which is when tv advertising is permitted.

**Table 4: Total in game exposure by inventory type – Free TV Australia**

	AFL	NRL	Combined
<b>Apparel</b>	22%	65%	55%
<b>In-Stadia</b>	59%	30%	37%
<b>TV</b>	19%	5%	8%

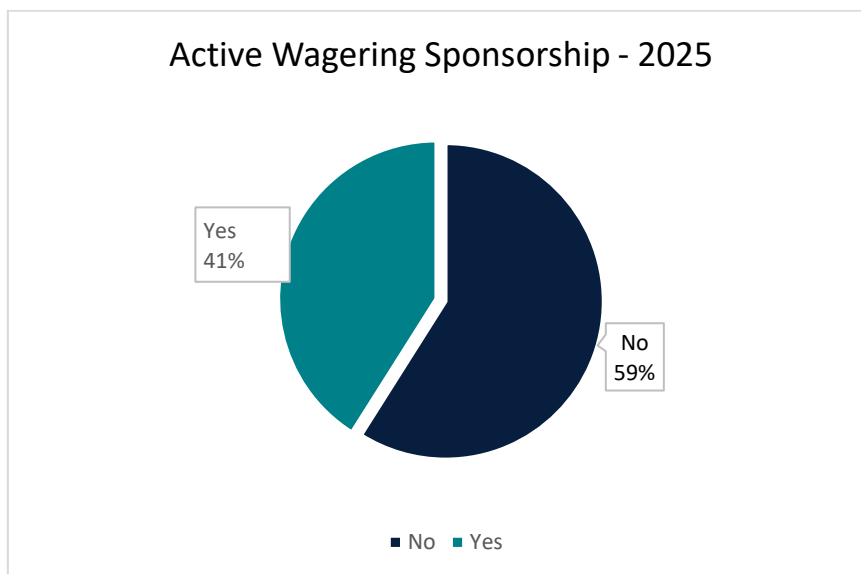
Wagering sponsorship is prevalent across Australia’s professional sporting landscape. Most of Australia’s major sporting competitions have an official wagering sponsor, including the AFL (Sportsbet), NRL (Sportsbet), Cricket Australia (Bet365), Rugby Australia (Bet365) and the NBL (Dabble).

<sup>30</sup> Australian Communications and Media Authority (ACMA), [Gambling advertising in Australia: Consumer and advertising placement research](#), ACMA, Australian Government, 2019.

<sup>31</sup> Research commissioned by Free TV Australia and provided to the department. The research has not been published, but the department has permission to reproduce its findings in this document.

Desktop analysis by the department indicates 41% of professional teams across the 3 major winter football codes (AFL, NRL, Super Rugby) have an active wagering sponsor for the 2025 season. This number is significantly boosted by the NRL, where 13 out of 17 or 76% of teams do, compared with 17% in the AFL and 25% in Super Rugby.

**Figure 2: Major winter football codes active wagering sponsor status**



## There are significant commercial implications associated with wagering advertising reform

It is imperative any reforms do not jeopardise the continued provision of public interest journalism and grassroots sports. In 2024, total gambling advertising spend was \$186 million, or 1.9% of the total Australian advertising market, with wagering advertising accounting for \$82 million of this.<sup>32</sup> This has reduced from \$310 million, or 3% of the total Australian advertising market in 2022, with wagering advertising worth \$217 million. This reduction could be viewed as the industry responding to the high-profile Online Gambling Inquiry and subsequent considerations from government on stronger regulation. This reduction has mostly impacted the commercial television broadcasters, which has seen wagering advertising revenue fall by 67.6% between 2022 and 2024.

**Table 5: Nielsen Ad Intel – Wagering advertising spend**

	2018		2022		2024	
	\$ (m)	%	\$ (m)	%	\$ (m)	%
<b>Television</b>	103.0	1.4	127.9	3.3	41.4	1.3
<b>Radio</b>	12.7	0.8	10.7	1.5	5.0	0.7
<b>Online</b>	-	-	43.8	0.9	22.7	0.5

Table notes:

1. Percentages show the proportion that wagering advertising accounts for out of the total advertising revenue for each sector.
2. Television figures includes all free-to-air channels in metropolitan and regional areas (including SBS). Does not include advertisements shown on associated streaming services (e.g. 7plus or 9Now) or subscription television services such as Foxtel.

<sup>32</sup> Department’s analysis of Nielsen Ad Intel data, provided in March 2025 (not available for publication).

3. Radio figures only include metropolitan AM and FM radio stations (including commercial broadcasters and narrowcasters). Nielsen does not collect data on regional stations.
4. Online figures cover general display (e.g. static banner ads on websites) and social media (e.g. Facebook and Instagram). It does not capture all platforms. Representative data is not available from 2018.

Additionally, Australia's professional sporting competitions collectively receive around \$52.5 million in direct sponsorships from wagering companies each year.<sup>33</sup> Sporting competitions also receive funding through product fee agreements with wagering companies, which provides each sporting body a percentage of bets placed on their respective competitions. These agreements are reportedly worth around \$40 million for the AFL and \$50 million for the NRL each year.<sup>34</sup>

Both sectors use these revenues to fund important public goods such as news and public interest journalism, and grassroots and community sports. These services are highly valued by the Australian community, and any wagering advertising reforms should be balanced against the risk of reducing the sectors' capacity to continue to invest in them. Any lost revenue would compound other sustainability concerns being faced by the sectors.

The broadcasting industry is experiencing a period of structural adjustment, significantly impacted by declining advertising revenue and increased competition from global streaming services. Despite audiences increasingly shifting to digital platforms,<sup>35</sup> Australians continue to rely on the free-to-air broadcasting services for news and sport, particularly during natural disasters and in relation to matters of national and global significance. In 2023, 18 of the top 20 most viewed programs on television were sports,<sup>36</sup> and the Matildas semi-final against England in the 2023 FIFA World Cup became the most watched television program since the current measurement system began in 2001.<sup>37</sup>

The business operating model of broadcasting involves high fixed costs for the maintenance of physical transmission infrastructure, particularly in regional areas where populations are lower. Investment in news and public interest journalism is one of the few costs that broadcasters are able to adjust in the face of declining revenues. Recently, broadcasters have been cancelling and consolidating local news bulletins. For example, in 2021 state-wide news bulletins were cancelled in Queensland, New South Wales and Victoria following the WIN and Nine affiliation agreement,<sup>38</sup> Southern Cross Austereo shut down the Spencer Gulf Nightly News in April 2023,<sup>39</sup> Seven ceased its Gold Coast news bulletin in 2024,<sup>40</sup> and Nine ended its Northern Territory news bulletin in January 2025.<sup>41</sup> These decisions have impacted free and easy access to a range of news sources, vital for ensuring Australians can stay reliably informed.

Sport is also fundamental to the Australian way of life; the Australian Sports Commission research demonstrates that over 90% of Australian adults have an interest in sport.<sup>42</sup> Similarly, 47% of children aged 0-14 participate in organised outside-of-school hours sport-related activity at least once a week.<sup>43</sup>

As not-for-profit organisations, Australia's largest professional sporting codes invest profits back in the game, including through grassroots and community participation programs such as the AFL's Auskick, rather than paying dividends to investors.

As reported in their 2024 Annual Reports, the AFL made around \$92 million investment in grassroots sport in 2024 (an increase of 51% compared to 2022),<sup>44</sup> while the NRL invested around \$41 million (a decrease of 5%

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<sup>33</sup> Department's analysis of confidential information provided by sporting stakeholders in August 2024 (not available for publication).

<sup>34</sup> Z Samios, '[\\$40m not enough: The AFL's plan to grab more gambling money](#)', *The Australian Financial Review*, 28 January 2025.

<sup>35</sup> Australian Communications and Media Authority (ACMA), [Communications and media in Australia: Trends and developments in viewing and listening 2023–24](#), ACMA, Australian Government, 2024, p.3.

<sup>36</sup> J Manning, '[Winning the race: TV ratings top 50 2023 all about sport, what about 2024?](#)', *MediaWeek*, 16 January 2024.

<sup>37</sup> ABC, '[Matildas' Women's World Cup semi-final loss to England sets TV audience record](#)', *ABC*, 17 August 2023.

<sup>38</sup> S Lawrence, '[TV news bulletins to go in Queensland, Victoria, NSW as Nine drops Southern Cross for WIN](#)', *ABC*, 12 March 2021.

<sup>39</sup> N Ward, C Cominos and O Brown, '[Spencer Gulf Nightly News axed by Southern Cross Austereo](#)', *ABC*, 13 April 2023.

<sup>40</sup> L Cartwright, '[Channel 7 axes Gold Coast news bulletin in yet another major shake-up](#)', *news.com.au*, 19 November 2024.

<sup>41</sup> R McKnight, '[Nine staff shocked as local Northern Territory TV bulletin axed without notice](#)', *7NEWS*, 22 January 2025.

<sup>42</sup> The Boston Consulting Group (BCG), [Intergenerational Review of Sport 2017](#), Australian Sports Commission (ASC), Australian Government, 2017.

<sup>43</sup> Clearing house for Sport, [AusPlay Data Portal](#), Clearinghouse for Sport website, 2024.

<sup>44</sup> Australian Football League (AFL), '[2024 Annual Report](#)', *AFL*, 2025.

compared to 2022).<sup>45</sup> This investment typically takes the form of infrastructure investment such as changeroom facilities, as well as junior sports participation programs. This investment and encouragement of participation in community grassroots sports has health benefits as well. The more widely available and well-resourced community sport is, the more people can experience the related health and wellbeing benefits.

Similar to the broadcasting industry, Australia's sporting codes have fixed costs, including those related to salary caps, which are locked in by virtue of multi-year agreements with professional player unions, as well as costs associated with running professional competitions. When revenues fall, as they are estimated to as a result of any wagering advertising reform, it is likely that investment in grassroots and community sports program would also reduce.<sup>46</sup> This is particularly true for the AFL, which has committed to spending 10% of its revenue on game development and community football.<sup>47</sup>

## Policy objectives and role of the government

Advertising regulation in Australia is intended to strike a balance between legitimate commercial interests and appropriate community safeguards.

Prior to the commencement of the Online Gambling Inquiry, the balance was widely perceived to have leaned towards commercial interests of the wagering, broadcasting and sporting sectors. According to Nielsen Ad Intel data, wagering advertising spend across all platforms in 2022 was \$217 million, including \$128 million on commercial television and \$22 million on social media.<sup>48</sup>

Since the inquiry, the wagering sector has taken some action to reduce the volume and saturation of wagering advertising in response to community concerns. Wagering advertising spend decreased significantly between 2022 and 2024, down 62% across all platforms (to \$82 million). Notably, Sportsbet announced ahead of the 2025 AFL and NRL seasons that it would be ceasing its promotion of odds segments during halftime breaks in response to community concerns.<sup>49</sup> However, anecdotally it appears these segments have largely been replaced with other Sportsbet brand advertisements.

Broadcasters, sports and wagering industry stakeholders state that wagering advertising revenue is an important mechanism for sustaining the commercial viability of major sporting codes, broadcasters and media outlets and plays a direct role in funding activities that deliver broader public benefits. Sponsorship and advertising revenues fund sport, support free-to-air broadcasting and provide opportunities for brand competition and consumer choice. These commercial benefits also generate broader economic contributions, including employment and tax revenue. Broadcasters note that advertising revenue is not confined to entertainment programming but also helps subsidise public interest content, including independent journalism and news production, both of which are essential to a healthy democracy. Similarly, sporting organisations highlight that wagering sponsorship and advertising revenue contributes to community-level programs, pathways for young athletes, and the growth of women's and grassroots sport.

The sustainability of independent journalism has direct implications for the strength of democratic institutions, while the availability of funding for women's and community sport supports social inclusion, participation, and healthier communities. Any reform to advertising regulation therefore needs to weigh not only the risks of gambling harm but also the potential consequences for media diversity, civic engagement and community wellbeing.

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<sup>45</sup> National Rugby League (NRL), '[NRL Annual Report 2024](#)', NRL, 2025.

<sup>46</sup> Stakeholders have consistently advised that they do not expect to be able to substitute wagering advertisements, see Consultation section below for further detail.

<sup>47</sup> Australian Football League (AFL), '[AFL aims for one million participants, backed by \\$1B of investment](#)', AFL, 19 February 2024.

<sup>48</sup> Department's analysis of Nielsen Ad Intel data, provided in March 2025 (not available for publication).

<sup>49</sup> M Chwasta, '[Sportsbet ads giving tips are gone from footy broadcasts — what's left in their wake?](#)', ABC, 28 April 2025.

Despite the reduction in wagering advertising, there is ongoing concern among harm reduction advocates that saturation and normalisation of gambling promotions continue to present risks to young people and those vulnerable to gambling harm and that the wagering sector will increase advertising where permitted to do so once the government announces its policy.

In this context, the government's role is to navigate 3 interconnected objectives:

- Community protection: reducing exposure to children and vulnerable people, while supporting harm minimisation through improved and targeted restrictions.
- Commercial viability: ensuring that sports, broadcasters and media can continue to deliver high-quality content to Australian audiences in a financially-sustainable way and with appropriate regulation. This includes recognising the flow-on benefits of advertising revenue to journalism, independent news production and the growth of community and women's sport.
- Consumer freedom: recognising that wagering is a legal activity for adults, and that advertising can support brand choice and informed decision-making where appropriate, and with appropriate protections.

Policy settings must therefore reflect both the economic and social dimensions of this issue. While industry stakeholders emphasise the importance of advertising to the financial sustainability of sport and media, community sentiment is consistently in favour of stronger restrictions and safeguards. Recent research released by AIFS shows that 64% of Australians believe government should play the biggest role in deciding how wagering is advertised.<sup>[50](#)</sup>

Any policy reforms will also need to recognise the unique nature of the racing industry. Wagering and racing are intrinsically linked, with betting forming a core part of the racing experience and economic model. Unlike sport broadcasts where wagering advertising is an overlay on a broader entertainment product with wide family and youth audiences, most people who engage with racing broadcasters are typically seeking to participate in wagering activities. As outlined below, the wagering sector is a legal activity for adults to participate in with a range of existing harm minimisation measures. This includes the existing advertising restrictions outlined in the previous section and at Appendix C.

For this reason, wagering advertising reform requires specific consideration with respect to racing. In practice, advertising for racing is more confined to racing channels, racing venues and specialist publications or platforms that are accessed primarily by adults seeking to bet. The policy objective in the racing context is less about reducing incidental community exposure, particularly for children, and more about ensuring responsible advertising standards within an environment where gambling is already the expected activity.

Policy considerations for racing therefore should reflect the fundamentally different context of racing compared to sport. This approach is consistent with the Online Gambling Inquiry, which recommended exempting dedicated racing channels from wagering advertising restrictions.

## Policy objectives

The outcome of any wagering advertising reform should ultimately be to contribute to minimising gambling related harms and their impact on the Australian community, while balancing legitimate commercial interests. This is consistent with the established treatment for advertising regulation in Australia.

As this outcome is difficult to measure in isolation, any reforms should focus on ensuring wagering services are advertised in a responsible manner, recognising that the product has the potential to cause harm but is also linked to a legitimate and legal activity for adults.

Any reforms should aim to achieve the following outcomes:

- Removing wagering advertising during high-risk programming, such as children's and family programming, and live sporting events.
- Breaking the association between sports and wagering, particularly for children and vulnerable people.

- Minimising the saturation and targeting of wagering advertising, particularly for children and young people. This is particularly important for online platforms which offer tools to more precisely target people that may be at risk of gambling harm.

However, government action must balance harm minimisation with legitimate commercial interests. As a legal activity, wagering companies are allowed to advertise their products, but must do this in appropriate ways to respect community attitudes and expectations.

Similarly, by way of their respective business models, broadcasters and sporting organisations are enabled to accept advertising and sponsorship revenue from any legal activity or product to fund their operations provided it is done in a responsible manner. Restricting these organisations' ability to raise funding could jeopardise the ongoing availability of news and grassroots sport, and could require the government to subsidise their provision. It is therefore important to consider these other aspects when determining the appropriate government action.

Any wagering advertising reforms should seek to reduce the volume of wagering advertising in and around programming or content that is of particular interest to children, regardless of the platform it is available on. This includes dedicated children's programming, family programming, and live sporting events. It also extends to advertising in sports venues and on players' and officials' uniforms which is often very visible during sports broadcasting.

Addressing these outputs would contribute to the long-term reversal of the normalisation of wagering activities, particularly as it relates to children and its association with sport. There is no available evidence to reliably estimate a time frame to see a noticeable change in attitudes. While some international jurisdictions have implemented wagering advertising bans and restrictions (e.g. the Netherlands introduced restrictions on mass marketing on television, radio and outdoor advertising in public places, and Belgium banned wagering advertising in 2023), it is too soon to determine the impact these have had on wagering knowledge among the community.

If these objectives are achieved, then the wagering advertising reforms should contribute to addressing the prevalence of gambling-related harm in Australia over the long-term.

There is already preliminary evidence which may suggest the wagering industry's self-regulated reduction in wagering advertising since 2022 has had an effect on wagering behaviour in Australia. As noted earlier, wagering advertising has declined by a significant 53% on commercial television since 2022. Recent Queensland Treasury data on wagering expenditure has demonstrated a reduction in real wagering expenditure in Australia across both 2022-23 and 2023-24, coinciding with the period where advertising has reduced. Similarly, per capita wagering expenditure has declined from a high of \$409.64 in 2021-22 down to \$398.42 in 2023-24. In the 2 years prior when wagering advertising reached its highest volume in Australia, the same per capita expenditure figure grew from \$230.60 in 2019-20 to \$409.64 in 2021-22.<sup>50</sup>

While it is not possible to draw causal conclusions from this data, it should be noted that in the 2 years since the wagering industry has voluntarily reduced its advertising, real and per capita wagering expenditure has seen a reduction. This suggests that more significant wagering advertising reforms imposed by government would contribute to addressing the prevalence of gambling-related harm in the long term.

## Government's capacity to intervene

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<sup>50</sup> Queensland Government Statistician's Office, *Australian Gambling Statistics, 40<sup>th</sup> edition, 1998-99 to 2023-24*.

The Australian Government is best placed to address the issues relating to wagering advertising and has previously taken regulatory action in this space. It is imperative that any reforms in this space are nationally consistent to ensure all Australians benefit from clear and consistent minimum protections.

The wagering sector is already heavily regulated in Australia. Responsibility for the regulation of gambling services is shared between Commonwealth, state and territory governments.

The Australian Government has responsibility for the *Interactive Gambling Act 2001* (IGA) which is the primary Commonwealth legislation regulating the types of interactive gambling services that can be provided to persons located in Australia. The IGA currently includes restrictions around the advertisement of illegal gambling services.

The Australian Government also has responsibility for various harm minimisation measures, including existing wagering advertising rules under the *Broadcasting Services Act 1992* (BSA), anti-money laundering obligations under the *Anti-Money Laundering and Counter-Terrorism Financing Act 2006*, and sports integrity.

The Australian Government's responsibility under the BSA also extends to the regulation of the broadcasting sector, and to some degree the streaming sector.

Further, there is an existing regulator in the Australian Communications and Media Authority (ACMA). Established under the *Australian Communications and Media Authority Act 2005*, the ACMA is responsible for enforcing compliance with the existing gambling-related provisions under the IGA and BSA including with respect to wagering advertising. Minimising gambling harm is one of the ACMA's enduring priorities identified in its 2025-26 compliance and enforcement priorities.<sup>51</sup>

Existing regulation, resourcing and the subject matter expertise of the ACMA demonstrates the government has the capacity to support further regulation in this space.

State and territory governments have responsibility for the licensing and regulation of all gambling products and services, including the wagering sector. As part of this remit, some states have taken action to further reduce or restrict wagering advertising in their jurisdictions. For example, South Australia has banned all gambling advertising on radio between 6:00 am and 8:30 am on a weekday and on television between 4:00 pm and 7.30 pm on a weekday,<sup>52</sup> NSW has banned gambling advertising on public transport,<sup>53</sup> and Victoria prohibits gambling advertising on roads (billboards), public transport, and within 150 metres of schools.<sup>54</sup>

## Policy options

The department has considered a range of voluntary, co-regulatory, and regulatory approaches to address concerns with the volume and saturation of wagering advertising.

The department notes there are existing self- and co-regulatory codes in place that contain restrictions for wagering advertising, however as outlined above these frameworks have not kept pace with community expectations.

Additionally, the co-regulatory codes in particular are limited in application to specific broadcasters and do not extend to like services (e.g. 7plus or Netflix). The ACMA has called on broadcasters to make changes to their codes of practice to address the expectations of audiences, including for the commercial television

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<sup>51</sup> Australian Communications and Media Authority (ACMA), [Compliance and enforcement priorities 2025–26](#), ACMA website, 2025.

<sup>52</sup> Consumer and Business Services, [Authorised Betting Operations Gambling Code of Practice \[PDF\]](#), Gambling and Associations, Government of South Australia, 2025, p 14.

<sup>53</sup> Minister for Gaming and Racing and Minister for Transport, [Minns Government moves to ban gambling advertising from trains](#) [media release], NSW Government, 28 January 2025.

<sup>54</sup> Premier of Victoria, [Gambling Ad Ban Near Schools, Roads And Public Transport](#) [media release], State Government of Victoria, 17 September 2017.

sector to voluntarily extend its broadcast safeguards to all television content provided online.<sup>55</sup> This has not occurred to date, with the ACMA recently deciding to not register a revised commercial television code due to concerns it did not provide appropriate community safeguards.

A legislative approach would therefore resolve these concerns by removing vested commercial interests from the equation. Crucially, it would provide a platform-neutral approach where appropriate and would ensure the ACMA has adequate powers to enforce compliance (including financial penalties).

The department has also considered a broad range of options to achieve the policy objectives. This includes:

- content restrictions (e.g. inducement advertising or the use of celebrities in marketing material)
- time-based restrictions (e.g. banning wagering advertising during certain times of the day, such as between 5:00 am and 10:00 pm)
- program-based restrictions (e.g. banning wagering advertising during certain program types, such as live sporting events, children’s programming or family programming)
- frequency limits (e.g. limiting the frequency of wagering advertising during a specific period, such as no more than 2 wagering advertisements per hour or no more than 9 per day)
- user-based restrictions (e.g. banning wagering advertising for certain users, such as banning for all people under 18 and empowering adults to choose whether they wish to see wagering advertisements)
- location-based restrictions (e.g. banning wagering advertising at specific locations, such as at sports venues, in shopping malls, or near schools).

Having considered the above options and approaches, the department has considered the following 3 policy options in detail to address the harms associated with wagering advertising:

- Option 1 – Maintain existing arrangements (status quo).
- Option 2 – Legislative reform to introduce a comprehensive package of reforms and provide the ACMA with adequate enforcement powers.
- Option 3 – Legislative reform to introduce a full ban on all wagering advertising and provide the ACMA with adequate enforcement powers.

The content of these 3 options is summarised in the following table and considered in further detail in the remainder of this section.

**Table 6: Summary of options considered in detail**

Option 1	Option 2	Option 3
Maintain existing arrangements (status quo)	Legislative reform to introduce a comprehensive package of reforms and provide the ACMA with adequate enforcement powers	Legislative reform to introduce a full ban on all wagering advertising and provide the ACMA with adequate enforcement powers
No Australian Government changes	A comprehensive package of reforms to achieve a meaningful reduction in the volume of wagering advertising across broadcast, online and out-of-home.	A full ban on all wagering advertising across all platforms, introduced across 4 phases
	Compliance and enforcement powers for the ACMA (e.g. financial penalties)	Compliance and enforcement powers for the ACMA (e.g. financial penalties)

<sup>55</sup> ACMA, ACMA decision on revised Commercial Television Industry Code of Practice.

## Who the reform would apply to

Options 2 and 3 would involve legislative reform that would apply to all licensed wagering service providers. The reforms under Option 2 would primarily be limited to broadcasting, online and out-of-home platforms, while Option 3 would cover all platforms (also including print).

Obligations for compliance under both Option 2 and 3 would be shared between wagering service providers and operators of platforms permitted to display wagering advertising. This includes licensed Australian broadcasters (e.g. Seven West Media and Nine Entertainment Co.), streaming services (e.g. Netflix and Disney+), social media platforms (e.g. Facebook and TikTok), general and news websites (e.g. Crikey and news.com.au), sports leagues and clubs (e.g. AFL and NRL), sports stadium operators (e.g. MCG Trust and Stadiums Queensland), and out-of-home (e.g. oOh! Media and QMS Media).

Consistent with the Online Gambling Inquiry, advertising for lotteries and other forms of gambling (e.g. keno and land-based venues) are outside the scope of these reforms.

## Option 1 – Maintain existing arrangements (status quo)

This option would involve no Australian Government intervention, with wagering advertising continuing to be subject to a range of self-regulatory, co-regulatory, and regulatory frameworks (refer to Appendix C).

Any changes to these rules would be a matter for the various owners of these frameworks, which the Australian Government has no role in. For example:

- Broadcasters could voluntarily make changes to their co-regulatory codes of practice, in consultation with the ACMA.
- The Australian Association of National Advertisers (AANA) could voluntarily make changes to its self-regulatory code which primarily goes to the content of wagering advertising.
- Wagering service providers could continue to voluntarily make changes to their advertising practices (e.g. Sportsbet voluntarily removing promotion of odds during the half-time break of the AFL and NRL).

Given the Australian Government's limited role in these frameworks, it would be difficult to ensure appropriate rules are put in place in a timely manner. It would also be difficult to ensure consistency across platforms, which could see broadcasters continue to have a more onerous ruleset compared to streaming services.

## Option 2 – Legislative reform to introduce a comprehensive package of reforms and provide the ACMA with adequate enforcement powers

Option 2 would introduce a comprehensive package of legislative reforms to minimise children's exposure to wagering advertising and reduce the saturation and targeting of wagering advertising. The legislative approach would streamline implementation across all platforms and provide strong penalties for non-compliance.

This option acknowledges that wagering is a legal activity for Australian adults, while recognising the potential for harm associated with high exposure to children and vulnerable people. This package takes advantage of available technologies where possible to focus on reducing exposure of wagering advertising to children and vulnerable people.

Where appropriate, wagering advertising restrictions should be platform neutral to ensure consistency in all places where Australians are likely to see wagering advertising.

The following table outlines the restrictions that would apply to each platform. All platforms restrictions are intended to apply to all platforms, unless a platform-specific restriction goes further (e.g. the broadcast ban at all times).

**Table 7: Option 2 – Package of Reforms**

Platform	Restrictions
<b>Live Sporting Events</b>	<ul style="list-style-type: none"> <li>Ban wagering advertising during live sporting events on broadcast and streaming between 6:00am and 8:30pm, including 5 minutes before and after the live sporting event. <ul style="list-style-type: none"> <li>Wagering advertising will continue to be permitted during scheduled breaks (e.g. half-time) after 8:30pm.</li> </ul> </li> <li>Ban wagering advertising at sports venues and on officials’ uniforms (e.g. player jerseys and coaches’ polos).</li> </ul>
<b>Frequency cap on broadcast television</b>	<ul style="list-style-type: none"> <li>Restrict wagering advertising on broadcast television to no more than 3 wagering advertisements per hour per channel between 6am and 8:30pm.</li> </ul>
<b>School drop-off and pick-up on broadcast radio</b>	<ul style="list-style-type: none"> <li>Ban all wagering advertising on broadcast radio during school drop-off (8:00-9:00am) and pick-up (3:00-4:00pm) hours.</li> </ul>
<b>Triple lock functionality on online platforms</b>	<ul style="list-style-type: none"> <li>Ban wagering advertising on online platforms that do not offer ‘triple lock’ functionality (i.e. to display wagering advertisements a platform must: <ul style="list-style-type: none"> <li>require users to be signed in</li> <li>confirm that a user is over 18 years of age</li> <li>allow users to opt out of wagering advertisements</li> </ul> </li> <li>All platforms restrictions above will apply when wagering advertising is permitted.</li> </ul>
<b>Content restrictions</b>	<ul style="list-style-type: none"> <li>Ban wagering service providers from using notable people and players to promote wagering services.</li> <li>Ban wagering service providers from the promotion of odds in wagering advertisements.</li> </ul>

Consistent with the Online Gambling Inquiry, an exemption for dedicated racing channels, programs and racetracks will be provided in recognition of the intrinsic link between racing and wagering and the limited exposure for children. Dedicated betting websites and venues (e.g. TAB outlets) will also be exempt given users are seeking these services out.

## Live sporting events

This option would enshrine existing protections on wagering advertising during live sporting events shown on broadcast and streaming platforms in legislation. These existing restrictions are currently split across the BSA and the co-regulatory broadcasting codes of practice. Placing these in the IGA simplifies the regulatory framework and enables strong penalties for non-compliance.

Wagering advertising will continue to be banned during live sporting events shown on all platforms (including broadcast television and radio, streaming, and social media) at all times to protect children who may be watching or listening. The rules would be stronger between 6:00am and 8:30pm to further protect children, including banning wagering advertising during scheduled breaks as well as 5 minutes before and after a live sporting event.

This option would also introduce a new ban on all wagering advertising in sports venues and on players’ and officials’ uniforms. It will capture any on-field and perimeter signage, as well as signage in coaches’ boxes.

These live sporting event restrictions would significantly reduce children’s exposure to wagering advertising when attending or watching sports.

The existing exemption for the incidental broadcast of digital advertising of illegal offshore gambling companies in matches played overseas should also be removed. This would provide better protections for Australian viewers of international sporting events, such as Formula 1 (which often includes advertisements for 188 Bet) and the NBA (which often includes advertisements for ESPN Bet). These advertisements are currently allowed due to the Australian broadcasters not receiving a benefit from the advertisement. The ACMA issued a compliance alert on 21 May 2025 to notify broadcasters and streamers about its expectations and approach to gambling advertising in international live sporting feeds which indicates the technical capacity to remove such digital advertising exists.<sup>56</sup>

An exemption for the incidental broadcast of physical advertising (e.g. physical billboards and player jerseys) in overseas feeds should be retained due to technical limitations.

Despite the existing restrictions, users continue to see a relatively large number of wagering advertising when watching live sport. Table 3 provides examples of the volume of wagering advertising during select games from 2024. The proposed frequency cap on broadcast television (see below) would also ensure pre- and post-match content is not saturated with wagering advertising.

## Frequency cap on broadcast television

One of the policy objectives for reform is to minimise the saturation and targeting of wagering advertising, particularly for children and young people.

This proposal would limit the frequency of wagering advertising on broadcast television to no more than 3 wagering advertisements per hour per channel between 6:00am and 8:30pm.

This would apply to all terrestrial television channels in recognition of the limited capability to tailor advertising to individuals as a one-to-many medium. Streaming services (e.g. 7plus and SBS On Demand) will be subject to separate user-based requirements (see triple lock section below).

This limit will stop wagering advertising from saturating programs, including those that are not explicitly targeted at children but that a significant number of children may still be watching. This includes during news and current affairs programs which was a key concern of the Online Gambling Inquiry.

The frequency cap will be applied only between 6:00am and 8:30pm. This is primarily to protect Australian children from excessive exposure when they are likely to be watching television. A frequency cap will also restrict wagering providers from bombarding sports broadcasts with wagering advertising, especially prior to kick off. These programs are heavily watched by children and families, and a frequency cap will ensure children’s exposure to wagering advertising is minimised and contribute to breaking the nexus between wagering and sport.

## School drop-off and pick-up on broadcast radio

This option would ban all wagering advertising on broadcast radio during school drop-off and pick-up hours. This aims to reduce children’s exposure while they are in the car or bus (where there is limited to no parental supervision) on the way to and from school.

This option is consistent with the principle of the Online Gambling Inquiry’s recommendation. However, the restricted period should be extended to one hour (8:00-9:00am and 3:00-4:00pm) to ensure all jurisdictions and school times are captured. School hours in Australia typically range from 8:30-9:00am to 3:00-3:30pm meaning children are in transit before and after these times.

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<sup>56</sup> Australian Communications and Media Authority (ACMA), [Gambling ads during international live sporting feeds](#), ACMA, Australian Government, May 2025.

These restrictions would apply to all terrestrial radio channels in recognition of the limited capability to tailor advertising to individuals. Radio and podcast streaming services would be subject to separate user-based requirements (see triple lock section below).

Data supplied to the department by Commercial Radio and Audio shows that between 11-12% of the total audience during these times is between 10 and 17 years of age. A further 9-10% of the audience is in the 18-24 age bracket and 22-23% are in the 25-39 age bracket, both of which are considered key demographic targets for wagering companies. This means around 45% of the total audience during the school drop-off and pick-up hours are either under 18 or considered high-risk from a gambling harm perspective.

## Triple lock functionality on online platforms

In contrast to broadcast television and radio, online platforms are able to implement user-based restrictions to control the type of advertising displayed to individual viewers. This makes it technically feasible for interested adult viewers to receive wagering advertising while children, vulnerable people, and people who do not wish to see any wagering advertising will not.

Under this option, wagering advertising will be banned by default on all online platforms at all times. This would provide strong baseline protections for all Australians, particularly children and young adults.

An exemption will be included to permit wagering advertising on online platforms that offer triple lock functionality. This means only platforms that have implemented the following 3 'locks' will be permitted to display wagering advertising to users:

- require users to be signed in,
- confirm that a user is over 18 years of age, and
- allow users to opt out of receiving all wagering advertising.

The obligation for implementing these controls will be placed on the online platform, not on users (except as it relates to opting out).

This exemption recognises that wagering is a legal activity for Australian adults and that advertising can support brand choice and informed decision-making where appropriate. This would enable responsible wagering advertising to Australians who may be interested in receiving it.

This triple lock exemption would apply to all online platforms and device applications, including:

- streaming services (e.g. SBS On Demand, 7plus, Netflix, Disney+)
- social media (e.g. Facebook, Instagram, Snapchat, YouTube)
- search engines (e.g. Google, Bing, Yahoo)
- music and podcast services (e.g. Spotify, Apple Podcasts)
- app stores (e.g. Apple App Store, Google Play Store)
- general websites and apps, including sporting codes (e.g. AFL.com.au and the NRL app) and news websites and apps (e.g. The Canberra Times, The Courier Mail).

An online platform that is unable or unwilling to implement all 3 'locks' will be prohibited from displaying wagering advertising to all of its users regardless of their age. Wagering advertising on platforms that do implement 'triple lock' functionality will also be subject to the all platforms restrictions outlined above.

The government has also separately implemented a social media minimum age and age assurance for search engines as part of the Phase 2 Codes. These measures do not extend to all online platforms, whereas the proposed triple lock for wagering advertising does. While these age assurance measures may support triple lock implementation for social media and search engines, it is not proposed to be as onerous.

Implementation of the triple lock measure may also coincide with the introduction of a digital duty of care framework for online service providers in the *Online Safety Act 2021*. The government announced an intention to legislate a digital duty of care in November 2024. The Department is currently developing a duty of care model for legislation, informed by ongoing consultation. Potential interactions with the triple lock

measures will be considered through the legislative design process and implementation of the digital duty of care.

## Content restrictions

This package would also place additional restrictions on the content of the wagering advertising that is permitted to be shown. These restrictions aim to reduce the appeal of wagering advertising to children and young adults, and to reduce the associated harm from exposure to them.

This includes a ban on the use of notable persons (including current and former sports stars) to promote wagering, unless they are a legitimate employee of a wagering company.

In recent years wagering service providers have included a number of high-profile persons in their wagering advertisements. These have included basketballer Shaquille O’Neal, actor Mark Wahlberg and social media influencers The Inspired Unemployed. Use of such figures has been argued to strongly appeal to children and young people, which has the potential to increase gambling harm. Other countries, including the United Kingdom, have imposed such a ban.

## Option 3 – Legislative reform to introduce a full ban on all wagering advertising and provide the ACMA with adequate enforcement powers

This option would introduce a legislative prohibition on wagering advertising across all platforms, consistent with the Online Gambling Inquiry’s recommendation.

This option is consistent with the approach taken for the advertisement of tobacco and vaping products, which are prohibited on all platforms in recognition of the significant harm experienced from consumption of these products.

A full ban could be phased-in to minimise the impact on affected sectors. The following table outlines the 4-phase approach recommended by the Online Gambling Inquiry.

**Table 8: Option 3 – Online Gambling Inquiry recommended phasing of restrictions**

Phase	Restrictions
<b>Phase 1</b>	<ul style="list-style-type: none"> <li>Ban on all wagering inducement advertising.</li> <li>Ban on all wagering advertising on social media and online platforms.</li> <li>Ban on wagering advertising on radio between 8:30 am to 9:30 am and 3:30 pm to 4:00 pm, reflecting school pick-up/drop-off times.</li> </ul>
<b>Phase 2</b>	<ul style="list-style-type: none"> <li>Ban on wagering advertising during live sports broadcasts, and 60 minutes before and after.</li> <li>Ban on all in-stadia advertising, including jersey sponsorships.</li> </ul>
<b>Phase 3</b>	<ul style="list-style-type: none"> <li>Ban on wagering advertising on radio and television between 6:00 am to 10:00 pm.</li> </ul>
<b>Phase 4</b>	<ul style="list-style-type: none"> <li>Ban on all wagering advertising and sponsorship.</li> </ul>

# Impact analysis

The department has considered the following to determine the net benefit of each policy option considered:

- regulatory burden on industry and governments
- socio-economic benefits for Australians and governments
- direct financial impacts on industry, and subsequent effect on the provision of public goods.

The department commissioned the Australian Gambling Research Centre (AGRC) to estimate the potential socio-economic benefit of options for wagering advertising reform. This included the Online Gambling Inquiry's proposed full ban, as well as intermediate options identified by the department. This report (not published) forms the basis for the department's assessment of the socio-economic benefits for Australians and governments in this section.

While the AGRC's report did not consider the package of reforms proposed in Option 2, it did provide estimates for the benefit of 2 partial ban approaches. The department has used the range between these 2 estimates to approximate the socio-economic benefit of Option 2 in this section. More information on this report, including core assumptions and limitations, is outlined at Appendix D.

The department also used a simplified cost benefit analysis to compare the net benefit of the identified options. This net benefit is one of the inputs to the department's decision rule to identify the preferred option, alongside the policy objectives and stakeholder consultation outlined in this document. This approach was selected due to limited availability of reliable data and evidence to support a formal cost benefit analysis.

## Stakeholders identified and considered in the analysis

The department identified the following stakeholder groups as being potentially impacted by the reform options:

- government (including the federal, states and territories)
- industry (including wagering service providers, broadcasters, sporting codes and clubs, streaming services, social media and general websites)
- Australian consumers and community.

In total, the department has identified 2,461 industry members that will be impacted in some way by the preferred option. This comprises:

- 180 wagering service providers
- 2,267 broadcasters, including 5 commercial television broadcasters, 260 commercial radio broadcasters, 1 subscription television broadcaster, 1 national broadcaster (SBS), and around 2,000 narrowcast radio broadcasters
- 4 sporting codes
- 5 social media services
- 5 streaming services.

The department has not estimated the number of general websites, including news websites, that would be impacted by the preferred option. Additionally, out-of-home platforms (including stadiums and billboards) have been considered due to limited availability of data for this sector.

## Government costs

The department considers each option will have a varying level of cost for government associated with the regulatory burden and socio-economic benefits.

## Option 1

This option does not introduce any new regulatory costs on governments.

There will likely be increased demand for government expenditure to address wagering harm if this option enables wagering harm to continue to grow in Australia. This includes expenditure on social welfare, support services, and law enforcement. Responsibility for these measures is shared between federal, state and territory governments.

## Option 2

This option is estimated to have a moderate budgetary impact on the Australian Government.

The ACMA will have an expanded role with respect to wagering advertising. The ACMA's remit will be significantly expanded to include streaming services, social media services, and general websites (including news and sports websites). The department estimates additional resourcing for the ACMA to administer these restrictions will cost around \$10 million per annum. The ACMA may be able to absorb these additional responsibilities within its existing budget and resourcing.

There may also be an indirect impact on the revenue raising capability of the state and territory governments if this option led to a significant reduction in wagering activity. AGRC's research found that total yearly wagering expenditure would decline by \$62.7 million (0.8%) if a partial ban was implemented. The department is not able to estimate the decline in state and territory revenue at this time.

If wagering activity does decline as a result of this option, there may also be a reduced demand for government expenditure on support services. There is insufficient information available to estimate these costs to government.

## Option 3

Option 3 is estimated to have a smaller budgetary impact on the Australian Government compared with Option 2. This is due to the relative simplicity of enforcing compliance with a wagering advertising ban across all platforms.

The department estimates costs for the ACMA to administer these restrictions at around \$5 million per annum. The ACMA may also be able to absorb this cost within its existing resourcing.

Similar to Option 2, there may be an indirect impact on the revenue raising capability of the state and territory governments if the wagering advertising ban led to a significant reduction in wagering activity. AGRC's research found that total yearly wagering expenditure would decline by \$109.5 million (1.4%) if a full ban was implemented. The department is not able to estimate the decline in state and territory revenue at this time.

As this option has a greater impact on wagering harm, the demand for government expenditure on social welfare, support services and law enforcement in relation to wagering, may be significantly reduced. There is insufficient information available to estimate these costs to government.

## Industry costs

This section provides an estimate for the regulatory burden and financial impact on industry from each of the policy options.

A regulatory burden measurement framework has been calculated for each of the shortlisted policy options, in accordance with the guidance provided by the Office for Impact Analysis, and has been calculated on a 10-year basis.<sup>57</sup>

Industry salary costs were based on research for similar roles in similar organisations and estimates of additional staffing requirements. Industry stakeholders were consulted to provide information to support this estimate, however they indicated they were not able to provide estimates until the government’s policy was announced.

The take-home salary per additional full-time equivalent (FTE) staff member was estimated to be \$120,000 per year.<sup>58</sup> Additional non-wage labour costs were included in line with the Office for Impact Analysis guidance at a rate of 75% – giving a total annual cost of \$210,000 per full-time equivalent staff member.

For the purposes of this impact analysis, the department has focused on 44 main businesses across the broadcasting (12) sport (4), online (10) and wagering (18) sectors. The department has broken each sub-sector down to small/very low risk, large, and very large businesses to assist with the calculations. Where a business operates across multiple sectors, they have only been counted against their main sector. For example, Nine Entertainment Co is a licensed broadcaster and also operates an online platform (e.g. its 9Now and Stan streaming services) but it has been included as a broadcaster.

**Table 9: Breakdown of industry by sub-sector and business size**

Business Size	Broadcasters	Sports	Online Platforms	Wagering	Total
Small/very low risk	3	0	0	8	11
Large	5	2	2	6	15
Very large	4	2	8	4	18
<b>Total</b>	<b>12</b>	<b>4</b>	<b>10</b>	<b>18</b>	<b>44</b>

## Option 1

This option does not introduce any new regulatory costs on industry and may enable a positive financial impact.

Assuming wagering advertising returns to 2022 levels as a result of no government intervention, the broadcasting and online sectors may experience a positive impact of around \$117.2 million (compared to 2024).<sup>59</sup>

## Option 2

This option is likely to have the highest comparative regulatory burden on industry and a moderate financial impact.

The estimated costs to industry for complying with these restrictions is \$23.5 million over a 10-year period. Table 10 below provides a breakdown by industry sector.

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<sup>57</sup> The Office of Impact Analysis (OIA), [Regulatory Burden Measurement](#), Department of the Prime Minister and Cabinet, Australian Government, 2024.

<sup>58</sup> Glassdoor, [Advertising Manager Salaries](#), Glassdoor website, 21 September 2023.

<sup>59</sup> Department’s analysis of Nielsen Ad Intel data, provided in March 2025 (not available for publication).

**Table 10: Option 2 – Industry regulatory burden (10-year period)**

Business Size	Broadcasters	Sports	Online Platforms	Wagering	Total
Small-medium	\$3.2 million	\$0	\$0	\$8.4 million	\$11.6 million
Large	\$5.3 million	\$2.1 million	\$2.1 million	\$2.5 million	\$12.0 million
Very large	\$0	\$0	\$0	\$0	\$0
<b>Total</b>	<b>\$8.4 million</b>	<b>\$2.1 million</b>	<b>\$2.1 million</b>	<b>\$10.9 million</b>	<b>\$23.5 million</b>

### Assumptions

This estimate assumes that:

- small-medium online platforms will not implement the triple lock, instead choosing a full ban and not requiring additional resourcing to ensure compliance
- large businesses (except broadcasters) will require some additional resourcing to ensure compliance (estimated at 0.5 FTE)
- very large businesses across all sectors already have sufficient resourcing to enforce compliance with the proposed restrictions
- the broadcasting sector will not require any additional resourcing to ensure compliance with the proposed frequency cap or school drop-off and pick-up restrictions, however some resourcing will be required to implement the triple lock on streaming services operated by large broadcasters (estimated at 0.5 FTE)
- the wagering sector will require some additional resourcing to ensure compliance with the proposed restrictions estimated at 0.5 FTE for small-medium businesses and 0.2 FTE for large businesses.

Additional costs may apply for online platforms that choose to implement ‘triple lock’ functionality, including costs associated with the underlying technology to enable users to opt out and for platforms to check users ages. This includes for the broadcasting sector to implement this functionality for its streaming services.

The department does not have sufficient information to estimate the cost of building such a system. However, it should be noted that most online platforms already offer variations of a triple lock today. For example:

- The AFL allows users to sign in to its app/website, declare you are over 18 and opt out of wagering advertising.
- SBS On Demand requires users to be signed in to view content, viewers can provide their birth year and are able to opt out of wagering advertising.
- YouTube currently only shows wagering advertising when a user is logged in and is over 18 and provides an option to “reduce” the amount of wagering advertising.
- Facebook only provides wagering advertising to users who are signed in and over 18 and enables users to opt out of advertising from specific providers (e.g. Sportsbet, PointsBet).

These existing systems should minimise the cost of compliance for those platforms that choose to implement triple lock functionality.

This option would also have a high financial impact on affected sectors (excluding the wagering sector). The department estimates the short-term total impact across all sectors to be around \$111.3 million per annum (or \$1.1 billion over 10-years). Including the wagering sector (which may experience a positive financial impact), the 10-year impact is \$347.7 million).

However, industry has suggested the impact should be assessed against 2022, prior to the commencement of the Online Gambling Inquiry. This is largely due to the wagering sector voluntarily taking action to reduce the volume and saturation of wagering advertising in response to community concerns. Using the 2022 figures would almost double the impact to be around \$213 million per annum (or \$2.13 billion over 10-years).

Despite these views, the department has considered the 2024 impact outlined above in its impact analysis. The department considers industry has shown some capacity to absorb the impact between 2022 and 2024, without significant loss of services. Recently reported profits for the 2024-25 financial year for Seven West Media (\$57 million<sup>60</sup>) and Nine Entertainment Co (\$133 million<sup>61</sup>) were achieved despite the reduction in wagering advertising revenue. However, these results also indicate the sector has limited capacity to absorb further reductions from the 2024 baseline. The following table outlines the estimated financial impact for each sector compared to this 2024 base line.

**Table 11: Option 2 – Industry financial impact**

	Broadcasters	Sports	Online Platforms	Wagering	Total
<b>2024 Base Line</b>	\$64.0 million	\$52,500,000	\$22.7 million	\$0	\$139.2 million
<b>Impact (p.a)</b>	-\$19.2 million	-\$47.3 million	\$0	+\$3.8 million	+\$62.7 million
<b>Impact (10-years)</b>	-\$192 million	-\$472.5 million	\$0	+\$38 million	+\$627 million

### Assumptions

The financial impact outlined above uses a combination of data sources, including Nielsen Ad Intel, Standard Media Index, and information provided by stakeholders through consultation. The estimate assumes:

- The department estimates broadcasters will lose around 30% of their wagering advertising-related revenue through the broadcast restrictions under this option. Radio broadcasters will be especially hit by the school drop-off and pick-up which is the most lucrative advertising period. However, they may be able to recoup some through advertising on their streaming services. The department does not have sufficient information to estimate this amount.
- Sports will lose 100% of their sponsorship revenue through a combination of the broadcast and stadium bans under this option; however, they may be able to recoup some revenue through wagering advertising on their websites. The department has assumed the sports may retain 10% of the existing revenue.
- Online platforms on the whole will not see a reduction in wagering advertising through this option. While some Australians will not see any wagering advertising, the wagering sector is likely to maintain or increase wagering advertising on online platforms that implement triple lock.
- Wagering service providers will recoup around \$66.5 million through lower advertising spend, however this may be redistributed to other platforms. This is balanced against the estimated reduction in wagering expenditure as a result of the restrictions in this option (\$62.7 million). The 2024 base line for the wagering sector is \$0 as they do not earn wagering advertising revenue.

### Option 3

This option is estimated to have no regulatory burden on industry but a significant financial impact.

The department considers a full ban across all platforms would be simple to implement and would not require any additional staffing or systems to ensure compliance.

However, the department estimates the financial impact on affected sectors (excluding the wagering sector) would be significant.

<sup>60</sup> Seven West Media Limited, [2025 Full Year Results – Investor Presentation \[PDF\]](#), Seven West Media Limited, 2025.

<sup>61</sup> ASX Limited, [Nine Entertainment Co. FY25 Final Results](#), Nine Entertainment Co., 2025.

Based on the 2024 baseline, the short-term financial impact would be around \$139.2 million per annum (or \$1.4 billion over 10-years). This impact is similarly lower compared to the 2022 figures (\$213 million per annum or \$2.13 billion over 10-years).

Including the wagering sector (which may experience a positive financial impact), the 10-year impact is \$1.1 billion).

The following table outlines the estimated financial impact for each sector compared to this 2024 base line.

**Table 12: Option 3 – Industry financial impact**

Business Size	Broadcasters	Sports	Online Platforms	Wagering	Total
<b>2024 Base Line</b>	\$64.0 million	\$52.5 million	\$22.7 million	\$0	\$139.2 million
<b>Impact (p.a)</b>	-\$64.0 million	-\$52.5 million	-\$22.7 million	\$29.7 million	-\$109.5 million
<b>Impact (10-years)</b>	-\$640.1 million	-\$525.0 million	-\$227.2 million	\$297.4 million	-\$1.1 billion

### Assumptions

The financial impact outlined above uses a combination of data sources, including Nielsen Ad Intel, Standard Media Index, and information provided by stakeholders through consultation.

The estimate assumes all sectors will lose all existing wagering advertising revenue. While online platforms are likely to recoup most lost revenue, based on the relative growth in the total online advertising market, it is understood that broadcasters and sports will be significantly more limited in their capacity to recoup lost revenue. The reasons behind this are explored further in the consultation section.

Additionally, wagering service providers will recoup around \$139.2 million through lower advertising spend, however this may be redistributed to other platforms. This is balanced against the estimated reduction in wagering expenditure as a result of the restrictions in this option (\$109.5 million). The 2024 base line for the wagering sector is \$0 as they do not earn wagering advertising revenue.

Additional sectors would be affected by a full ban, including print (\$10.2 million per annum) and out-of-home (\$2.8 million per annum). This would increase the financial impact to around \$152.2 million per annum, or \$1.5 billion over 10-years.

## Consumers costs

This section provides an estimate of the socio-economic benefits for Australians of the identified policy options.

The department considers there will be no regulatory burden or direct financial impact on Australians under any of the considered options.

As flagged above, this section relies on research undertaken by the AGRC. The estimates in this research are likely to be underestimated. The estimated prevalence of gambling participation and harms may be underestimated, and several socio-economic costs associated with wagering (and avoided costs associated with wagering advertising restrictions) were unable to be estimated at all, including (but not limited to) crime, additional impacts on work, study and physical and emotional health, and costs to government.

The modelling was also unable to account for those who might stop gambling altogether, nor those who might otherwise commence gambling but do not because of the proposed wagering advertising restrictions.

Further, the modelling reflects a single year impact of wagering advertising restrictions, and as a result, does not capture any long-term benefits to consumers.

The modelling was also unable to reflect nuances relating to the timing of wagering advertisements which would be impacted by wagering advertising restrictions, and the size of the audience currently exposed to these advertisements (prior to policy reform).

## Option 1

This option is likely to see an increase in the volume of wagering advertising and is estimated to have a negative socio-economic impact on Australians.

As noted previously, wagering advertising has decreased significantly since the commencement of the Online Gambling Inquiry (see Table 2 on page 8). This is largely driven by the wagering sector responding to community concerns, however there is a risk that wagering advertising could increase if the government does not intervene.

If wagering advertising increased to its peak levels in 2022, Australians would see a total of 534,023 wagering advertisements on commercial television, 69,483 on metropolitan radio, and 7.25 billion impressions on online platforms. These are significant increases compared to 2024 levels.

An increase in wagering advertising is likely to lead to a continued increase in wagering expenditure and associated harms.

The AGRC research estimated the socio-economic costs of wagering in Australia in 2023 to be \$26.7 billion dollars. Table 13 below provides a breakdown of the socio-economic costs by harm domain.

Despite making up just 1.7 % of the total wagering population, moderate and high-risk wagerers account for 60% (\$16.1 billion) of the total socio-economic costs of wagering.

The department is unable to estimate the potential increase in wagering harms. However, it is assumed that wagering expenditure and associated harms will continue to grow consistent with the recent trends if the government action is not taken (see Table 1 on page 5).

**Table 13: Option 1 – Socio-economic costs for Australians**

Harm (\$)	Non-risk Wagering	Low-risk Wagering	Moderate-risk Wagering	High-risk Wagering	Total Socioeconomic impact of wagering
<b>Direct wagering expenditure</b>	\$2.5 billion	\$1.4 billion	\$2.2 billion	\$1.4 billion	<b>\$7.5 billion</b>
<b>Health</b>	\$2.4 billion	\$1.5 billion	\$2.3 billion	\$2.1 billion	<b>\$8.2 billion</b>
<b>Relationship Harm</b>	\$514.0 million	\$301.5 million	\$1.5 billion	\$3.3 billion	<b>\$5.6 billion</b>
<b>Psychological Harm</b>	\$1.2 billion	\$799.5 million	\$1.9 billion	\$1.1 billion	<b>\$4.9 billion</b>
<b>Work Harm</b>	\$20.0 million	\$31.2 million	\$91.1 million	\$355.5 million	<b>\$497.7 million</b>
<b>Financial Harm</b>	\$16.9 million	\$6.1 million	\$4.9 million	\$9.3 million	<b>\$37.2 million</b>
<b>Total</b>	<b>\$6.6 billion</b>	<b>\$4.0 billion</b>	<b>\$8.0 billion</b>	<b>\$8.2 billion</b>	<b>\$26.8 billion</b>

## Option 2

This option is estimated to have a significant positive impact on the Australian public, including people experiencing or at risk of experiencing gambling harm.

The department estimates this option will deliver a meaningful reduction in the volume of wagering advertising, including 100% reduction on broadcasting and at sports stadiums. This will significantly reduce exposure for children and vulnerable Australians.

It is not possible to estimate the reduction in the volume of wagering advertising on online platforms as this is heavily dependent on the individual. The proposed triple lock function under this option would empower Australian adults to opt out of wagering advertising if it is problematic for them or if they simply do not wish to be exposed to it. This means that some adults will receive no wagering advertisements, while others may receive more than they currently do. Importantly, children's exposure to wagering advertising would be reduced to 0.

This reduction is estimated to lead to a substantial socio-economic benefit for Australians.

Based on the AGRC's research, the department estimates the socio-economic benefit for Australians to be between \$117.6 billion and \$182.2 billion. Table 14 below provides a breakdown of the socio-economic costs by harm domain for the higher-benefit estimate.

Under this modelling, moderate and high-risk wagering has decreased significantly. Yearly wagering expenditure is estimated to decrease by \$82.7 million for these categories, partially offset by an \$20.0 million increase in low and no-risk wagering. This is an overall positive as it means more Australians safely participating in wagering activities.

**Table 14: Option 2 – Socio-economic costs for Australians**

Harm (\$)	Non-risk Wagering	Low-risk Wagering	Moderate-risk Wagering	High-risk Wagering	Total Socioeconomic impact of wagering
<b>Direct wagering expenditure</b>	\$12.3 million	\$7.7 million	-\$14.5 million	-\$68.2 million	<b>-\$62.7 million</b>
<b>Health</b>	\$18.3 million	\$3.1 million	-\$4.4 million	-\$36.5 million	<b>-\$19.6 million</b>
<b>Relationship Harm</b>	\$2.6 million	\$1.2 million	-\$3.5 million	-\$62.9 million	<b>-\$62.5 million</b>
<b>Psychological Harm</b>	\$5.8 million	\$3.0 million	-\$5.7 million	-\$33.8 million	<b>-\$30.7 million</b>
<b>Work Harm</b>	\$0.2 million	\$0.1 million	-\$0.2 million	-\$6.3 million	<b>-\$6.3 million</b>
<b>Financial Harm</b>	\$0.1 million	\$0.03 million	-\$0.03 million	-\$0.5 million	<b>-\$0.4 million</b>
<b>Total</b>	<b>\$39.2 million</b>	<b>\$15.1 million</b>	<b>-\$28.3 million</b>	<b>-\$208.1 million</b>	<b>-\$182.2 million</b>

## Option 3

This option is estimated to have the most significant positive impact for Australians, and especially those experiencing gambling harm.

This option would deliver a 100% reduction in the volume of wagering advertising across all platforms. Some wagering advertising would remain in limited circumstances, for example in licensed venues or on dedicated racing channels and websites. However, most Australians, particularly children, would see no wagering advertising.

The AGRC estimates this option would see a \$332.1 billion socio-economic benefit for Australians, including a \$109.5 million reduction in yearly wagering expenditure. Table 15 below provides a breakdown of the socio-economic costs by harm domain.

Similar to Option 2, this option is likely to see a significant reduction in moderate and high-risk wagering activity which will also be partially offset by an increase in low and no-risk wagering. Moderate and high-risk wagering expenditure is estimated to reduce by \$136.8 million, while low and no-risk wagering may increase by \$27.3 million (with 93% of this increase in the no-risk wagering category).

**Table 15: Option 3 – Socio-economic costs for Australians**

Harm (\$)	Non-risk Wagering	Low-risk Wagering	Moderate-risk Wagering	High-risk Wagering	Total Socioeconomic impact of wagering
<b>Direct wagering expenditure</b>	\$25.4 million	\$1.9 million	-\$17.0 million	-\$119.8 million	<b>-\$109.5 million</b>
<b>Health</b>	\$36.9 million	\$2.0 million	-\$10.8 million	-\$64.7 million	<b>-\$36.6 million</b>
<b>Relationship Harm</b>	\$5.4 million	\$0.4 million	-\$7.4 million	-\$111.5 million	<b>-\$113.1 million</b>
<b>Psychological Harm</b>	\$12.0 million	\$1.1 million	-\$10.5 million	-\$63.6 million	<b>-\$61.0 million</b>
<b>Work Harm</b>	\$0.3 million	\$0.05 million	-\$0.4 million	-\$11.2 million	<b>-\$11.3 million</b>
<b>Financial Harm</b>	\$0.2 million	\$0.01 million	-\$0.04 million	-\$0.8 million	<b>-\$0.7 million</b>
<b>Total</b>	<b>\$80.3 million</b>	<b>\$5.4 million</b>	<b>-\$46.2 million</b>	<b>-\$371.6 million</b>	<b>-\$332.1 million</b>

## Simplified cost benefit analysis

The following table provides a comparison of the net benefit of Option 2 and 3 to support the decision on the preferred option. Option 1 (status quo) is not included as it does not impose any additional regulatory burden, though it is estimated to have a positive financial impact on industry.

The table seeks to balance the impact on government and industry against the estimated socio-economic costs. On balance, both options would deliver an overall positive impact. This net benefit analysis will inform the decision rule for selecting the preferred option for wagering advertising reform.

**Table 16: Net benefit analysis (per annum)**

	Option 2	Option 3
Costs to government	-\$10.0 million	-\$5.0 million
Industry regulatory burden	-\$2.4 million	\$0
Industry financial impact	-\$66.5 million	-\$139.2 million
Wagering industry financial impact	+\$3.8 million	+\$29.7 million
Socio-economic costs	\$182.2 million	\$332.1 million
<b>Net benefit</b>	<b>\$107.1 million</b>	<b>\$217.6 million</b>

## Consultation

Since the release of the final report from the Online Gambling Inquiry in June 2023, the department has undertaken a thorough consultation process with a broad range of stakeholders.

This process, outlined below, followed extensive consultation undertaken by the Senate to inform the final report from the Online Gambling Inquiry. Over the course of the Online Gambling Inquiry, the Committee received 161 submissions, 26 exhibits, and held 13 public hearings. This evidence informed the Committee's recommendations, including with respect to wagering advertising.

While the Committee applied a public health lens to reduce gambling harm across the Australian population, it did not consider the financial impacts on affected sectors (including broadcasting and sports).

To assess the impacts of any wagering advertising reforms, the department undertook 4 primary phases of targeted consultation.

- Information Request 1 (July – September 2023).** In response to the Online Gambling Inquiry, the department sought information from broadcasters, digital platforms, sports, wagering, and out-of-home sectors to understand the estimated impacts of the recommended ban.
- Information Request 2 (October – November 2023).** In response to Information Request 1, some stakeholders proposed alternative reform options. The department sought further information on the impacts and feasibility of these models and scenarios. The department also sought feedback from a broader range of stakeholders, including racing organisations and harm reduction advocates.
- Information Request 3 (December 2023 – January 2024).** The department sought additional information from broadcasting stakeholders on information provided to date, including around the substitutability of advertising and definitions.
- Confidential Consultation (August – September 2024).** In collaboration with the office of the former Minister for Communications, the department held confidential meetings with a range of stakeholders on a possible model for wagering advertising reform. This process included consultation with organisations across the harm reduction, academic, sport, broadcasting, publishing, wagering, online, racing, and advertising sectors. Consultation sought feedback from stakeholders on the estimated financial impact and advertising reduction of the model.

Across this process, many stakeholders were hesitant to provide financial information due to commercial sensitivities. This limited the department's ability to obtain representative data to inform the financial impact and reduction in advertising. This information was supplemented with data acquired from third parties, including the Australian Institute of Family Studies, Nielsen, Standard Media Index, and OzTAM.

## Further consultation

Further consultation on the implementation of the recommended option should be undertaken as part of the legislation drafting process to ensure the reforms are fit-for-purpose and do not have any unintended consequences.

## Key concerns raised in consultation

Key themes raised across the consultation processes are set out in Table 17. These concerns have been incorporated into the development of this Impact Analysis and the department's consideration of the preferred option.

**Table 17: Key themes from consultation**

Theme	Description
<b>Live sporting events</b>	<ul style="list-style-type: none"><li>• Industry stakeholders were broadly supportive of increased restrictions during live sporting events.</li><li>• Some stakeholders argued restrictions should start and end 15 or 30 minutes before/after an event, instead of the 60 minutes recommended by the Online Gambling Inquiry. This was largely due to the relevance of programming that is broadcast 60 minutes either side of a sporting event.</li></ul>
<b>Children and young people</b>	<ul style="list-style-type: none"><li>• Industry stakeholders were supportive of the intention to provide appropriate safeguards to reduce children and young people's exposure to wagering advertising. Harm reduction advocates noted this has a priority for reform.</li><li>• Some stakeholders argued for the introduction of a frequency cap to limit children's exposure to wagering advertising. Proposed limits included 3 or 4 per channel per hour, or a daily maximum cap (including for online platforms).</li><li>• Conversely, harm reduction advocates questioned whether there was a "safe" frequency for children to be exposed to and cautioned the government from appearing to endorse any frequency as such.</li></ul>
<b>Financial impact</b>	<ul style="list-style-type: none"><li>• Industry stakeholders (including broadcasters and sports) expressed concern with the financial impact and the unintended consequences.</li><li>• Specifically, the broadcasters advised the importance of wagering advertising to funding its services, including news and public interest journalism, which are primarily provided free to all Australians. The broadcasters also cited the soft advertising market and overall sustainability concerns for the sector, which is facing structural adjustments amid significant competition from largely unregulated global streaming services. Additional wagering advertising restrictions would compound these issues.</li><li>• Similarly, the sports stakeholders were concerned that lost wagering revenue would jeopardise the sectors investment in grassroots and community-level sports. They were concerned the impact could be felt across direct sponsorships, wagering product fees (through which each code receives a percentage of bets placed on its matches), and broadcast/streaming rights fees.</li></ul>

Theme	Description
<b>Substitution of lost revenue</b>	<ul style="list-style-type: none"> <li>Both broadcasters and sports stakeholders advised it would be difficult to substitute lost wagering advertising and sponsorship revenue with other advertising revenue.</li> <li>As noted above, broadcasters are already facing declining advertising revenue and advised they are often not able to sell all available advertising inventory.</li> <li>Similarly, sports would be unable to easily substitute wagering revenue with another sponsorship category. As sports sponsorships are often exclusive (e.g. only 1 sponsor from each category), sports would not be able to substitute lost wagering revenue from a category that is already represented (e.g. the AFL wouldn't be able to be sponsored by Coles and Woolworths at the same time). Sports stakeholders further advised it is unlikely they could identify new sponsorship categories.</li> </ul>
<b>Illegal gambling services</b>	<ul style="list-style-type: none"> <li>Some industry stakeholders expressed concerns that banning or further restricting advertising for legal wagering services could lead to consumers being less aware of regulated services and moving towards illegal offshore providers.</li> <li>Illegal gambling services are potentially more harmful to Australians as they lack equivalent consumer protections and harm reduction measures. They also contribute no taxes or fees to support local industries.</li> </ul>
<b>Racing exemption</b>	<ul style="list-style-type: none"> <li>The racing and wagering industry expressed their view of racing's intrinsic link to wagering, and the need for it to be treated separately under a regulation model.</li> <li>Harm reduction and academia were also broadly supportive of the racing exemption, noting its unique and intrinsic links to wagering, however expressed concern that it could be used as a loophole for wagering advertising</li> </ul>

## Preferred option

### Identifying the preferred option

To identify the preferred option, this impact analysis incorporates the likely net benefit (including regulatory burden on industry and socio-economic costs and feedback from consultation). It also gives appropriate weighting to the stated objectives of government, focused on the three previously identified principles:

- Removing wagering advertising during high-risk programming, such as children's and family programming, and live sporting events.
- Breaking the association between sports and wagering, particularly for children and vulnerable people.
- Minimising the saturation and targeting of wagering advertising, particularly for children and young people. This is particularly important for online platforms which offer tools to more precisely target people that may be at risk of gambling harm.

These principles must also be balanced against the need to ensure the financial viability of industry, including the provision of highly valued public goods for which they are providing. It is these considerations which form the decision rule.

Based on this decision rule, Option 2 has been identified as the recommended option.

While the net benefit of Option 3 is higher in Table 16, the difference is largely attributable to the difference in the financial impact and regulatory costs on industry. The net benefit of Option 3 is higher than Option 2 by \$95.5 million, however the financial impact and regulatory costs is also higher by \$75.1 million.

During consultation, most stakeholders expressed concern regarding the unintended consequences of wagering advertising reform. Of particular concern was the impact it would have on the provision of local news and grassroots sports.

The stated socio-economic benefits of Option 2 and Option 3 do not include an assessment of the socio-economic costs of any degradation in the provision of public interest journalism on grassroots sport. We are unable to accurately quantify these costs based on the information provided because the impact is unclear as to how both broadcasters and sporting organisations would choose to respond to the financial impact imposed by the options outlined. However, it is imperative that these reforms do not jeopardise the sustainability of the media sector, which has been undergoing structural adjustment, and does not impact the continued provision of public interest journalism, particularly in regional areas.

There is a real risk that, as a result of the financial impact of wagering advertising reforms, media organisations—especially those serving regional communities—may be forced to cut back on news coverage, reduce staff, or even cease providing certain operations altogether. Such outcomes would undermine the availability of trusted sources of information, erode the role of media in holding power to account, and diminish the vibrancy of local news and community storytelling. This would not only compromise the public's access to essential information but could also have flow-on effects for social cohesion, civic engagement, and the representation of regional voices in national discourse. This is not included in the social-economic impacts, nor is it quantifiable based on available information but, ultimately, ensuring the financial viability of the media sector is critical to maintaining the diversity, integrity, and reach of public interest journalism across Australia. Negatively impacting these industries would undermine other measures the government is taking to support the media landscape.

Similarly, there is a real risk the wagering advertising reforms impact the continued investment by broadcasters and wagering companies in grassroots, community and women's sport. Grassroots sporting organisations play a pivotal role in maintaining the foundation of local sports infrastructure and ensuring widespread access to recreational opportunities. By supporting the ongoing operation of local clubs and sporting events, they contribute significantly to public health and overall wellbeing. Support for women's sport is particularly critical, promoting equal opportunities and increasing the visibility of female athletes. Sustained funding in this area encourages participation among girls and women, helping to address longstanding imbalances and support government goals for fairness and diversity in sport. As with public journalism, this is not included in the social-economic impacts, nor is it quantifiable based on available information but has ultimately informed the decision on preferred option.

It should also be noted that the proposed wagering advertising reforms form one part in the government's forward agenda to reduce gambling harm. Other measures taken forward by the government will compound the benefits of any wagering advertising reforms.

In conclusion, while option 3 has a higher net benefit than Option 2, it also imposes a significant financial burden on industry which would significantly impact Australia's grassroots sport and media industry. It does also not account for potential socio-economic costs on public interest journalism and grassroots sports which, anecdotally, can be expected to be higher for Option 3 than Option 2, given the greater financial impact on industry.

Accordingly, the department considers Option 2 achieves an appropriate balance between achieving the three government principles for wagering advertising reform, ensuring the ongoing viability of the media and grassroots sports sectors including the valuable public goods they provide and feedback from consultation.

# Implementation and evaluation

## Barriers and risks

The department considered the risks that could prevent the preferred option from meeting its stated objectives, and identified strategies to address and mitigate these risks.

The department identified 3 broad risks that would prevent Option 2 from achieving the costs and benefits estimated in this analysis:

1. Benefits are not achieved as the reforms are not effective in meeting identified policy objectives.
2. Restrictions lead to an increase in illegal offshore wagering activity, in turn leading to increased gambling harm.
3. Costs are higher than estimated as implementation of the restrictions is found to be overly burdensome for industry, resulting in impacts to the provision of public goods.

The department used the management process described in *AS/NZS ISO 31000:2018 Risk Management – Principles and Guidelines*, to consider the likelihood and consequence of these risks.

The likelihood of all 3 risks was assessed as unlikely given the preferred option targets platforms and programs in line with the policy objectives while still enabling licensed wagering operators to advertise in a controlled manner.

Further, while it is possible that the restrictions could impose more of a regulatory burden than estimated, it will be a matter for each business to decide the degree to which they implement the triple lock functionality online. Some businesses may assess the cost of implementing the tool is higher than benefit of displaying wagering advertisements.

The consequence of all 3 risks has also been assessed as moderate to major. If all 3 risks were to come to be realised, it would prevent the benefits of the reforms being realised. However, the department considers the damage would be reversible.

On a risk matrix, this would place these risks as being moderate to high as shown in Figure 3.

**Figure 3: Likelihood and consequence risk rating matrix**

		Consequence				
		Negligible 1	Minor 2	Moderate 3	Major 4	Catastrophic 5
Likelihood	5 Almost certain	Moderate	High	Extreme	Extreme	Extreme
	4 Likely	Moderate	High	High	Extreme	Extreme
	3 Possible	Low	Moderate	High	High	Extreme
	2 Unlikely	Low	Moderate	Moderate	High	High
	1 Rare	Low	Low	Low	Moderate	Moderate

The department also considered a number of controls to reduce the ratings of the identified risks. These controls are set out in Table 18.

**Table 18: Risk management strategies**

Risk	Control
<b>Regulation is not effective</b>	Restrictions will be legislated under the IGA (and other relevant Acts) to provide the ACMA with power to pursue strong enforcement actions, such as fines to act as a deterrent. The ACMA will work with industry to develop effective guidelines and advice. It will continue publishing quarterly reports on enforcement actions and investigation outcomes, and targeting interactive gambling as part of its annual Compliance Priorities.
<b>Regulation results in unintended consequences</b>	A statutory review process will identify if the risks eventuate and whether the treatments remain appropriate.
<b>Regulation costs outweigh the benefits</b>	The ACMA will work with industry to implement the reforms. A statutory review process will identify if the costs of regulation have contributed to a reduction in the provision of public goods.

## Implementation and commencement timings

Legislation will be required to implement the preferred option. The department recommends implementation through the IGA, with likely consequential amendments to the BSA, the *Australian Communications and Media Authority Act 2005* (ACMA Act) and the co-regulatory broadcasting codes of practice also required.

The preferred option should be implemented as soon as practical to address community concerns. However, it is difficult to predict Parliamentary timings.

The department recommends implementing all restrictions in a single phase. Consistent with similar reforms, a transitory period should be provided from the day after Royal Assent to enable affected stakeholders to prepare for the new legislative obligations.

The ACMA will have responsibility for monitoring and enforcing compliance with the proposed restrictions.

As outlined previously, the ACMA is best placed to take on this role given its existing remit with respect to wagering, broadcasting and online services.

The potential risks associated with implementation include opposition from some sectors of the industry and the complexity of implementing effective regulations in a rapidly evolving technological landscape. The possibility of industry opposition exists, given concerns about additional regulatory burdens and operational flexibility. The consequences could involve resistance to compliance, affecting the success of the reforms.

The ACMA will employ a collaborative approach, engaging in regular and transparent communication to address stakeholder concerns constructively to mitigate industry opposition.

## Evaluation process and timings

Following implementation of the preferred option, the department and the ACMA will monitor and evaluate trends in the wagering advertising landscape to ensure the reforms have been effective. This evaluation will be an integral part of the ACMA's ongoing compliance activities. An evaluation plan could be developed to the shared arrangements between the department and the ACMA.

This evaluation process would involve assessing the volume of wagering advertising across a range of platforms to determine the degree to which overall volume has decreased. The evaluation would also focus on children and young people as this has been identified as a particular concern and is one of the policy objectives of reform.

Evaluation would be ongoing to assess the degree to which the reforms have achieved the short-, medium- and long-term objectives outline in this document. The department would use a variety of data sources, including from industry and research bodies, to determine the effectiveness.

Success would be measured in the long-term against pre-reform data, including with respect to the number of complaints lodged with the ACMA, the number of breaches of the rules, community sentiment as expressed in surveys and research, rates of gambling harm, and the prevalence of key indicators (including the number of children betting, intending to bet, or able to quote the odds).

## Appendix A – Glossary of key terms

Term	Definition
<b>'Above the line' advertising</b>	Refers to mass media promotion intended to reach a large audience. Includes advertising on television, radio, billboards etc.
<b>ACMA</b>	Australian Communications and Media Authority
<b>ACMA Act</b>	<i>Australian Communications and Media Authority Act 2005</i>
<b>Advertisement</b>	Any writing, still or moving picture, sign, symbol or other visual image, or any audible message, or any combination of 2 or more of those things, that give publicity to, or otherwise promotes or is intended to promote a company, product, or feature.
<b>AGRC</b>	Australian Gambling Research Centre
<b>BSA</b>	<i>Broadcasting Services Act 1992</i>
<b>Gambling promotional content</b>	Means advertising content, sponsorship content, or promotional content that relates to a gambling service.
<b>Gambling service</b>	<p>Gambling service means:</p> <ul style="list-style-type: none"> <li>a) a service for the placing, making, receiving or acceptance of bets; or</li> <li>b) a service the sole or dominant purpose of which is to introduce individuals who wish to make or place bets to individuals who are willing to receive or accept those bets; or</li> <li>c) a service for the conduct of a lottery; or</li> <li>d) a service for the supply of lottery tickets; or</li> <li>e) a service for the conduct of a game, where: <ul style="list-style-type: none"> <li>i. the game is played for money or anything else of value; and</li> <li>ii. the game is a game of chance or of mixed chance and skill; and</li> <li>iii. a customer of the service gives or agrees to give consideration to play or enter the game; or</li> </ul> </li> </ul> <p>a gambling service (within the ordinary meaning of that expression) that is not covered by any of the above paragraphs.</p>
<b>Inducement</b>	Refers to any offer to persuade engaging in gambling activity, to bet more frequently, or in a riskier manner.
<b>IGA</b>	<i>Interactive Gambling Act 2001</i>
<b>Triple lock</b>	Refers to a regulatory setting for online platforms and applications where users are signed in, confirmed to be over 18 and have the option of opting out
<b>Wagering advertising</b>	Used in this Impact Analysis to refer to any gambling promotional content for a wagering service.
<b>Wagering service</b>	Wagering service means a service covered by paragraph (a) or (b) of the definition of gambling service.

# Appendix B - Full list of stakeholders consulted

Stakeholder Group	List of Stakeholders
<b>Broadcasters</b>	Australian Narrowcast Radio Association (on behalf of its members) Commercial Radio & Audio (on behalf of its members) Foxtel Free TV Australia (on behalf of its members) Nine Entertainment Co Paramount ANZ (Channel 10) Seven West Media Southern Cross Austereo (SCA) Special Broadcasting Service (SBS) Sports Entertainment Network (SEN) WIN Television
<b>Harm reduction advocates</b>	Alliance for Gambling Reform (AGR) Australian Medical Association (AMA) Australian Psychological Society Children and Media Australia (CMA) Financial Counselling Australia (FCA) Gambling Harm Lived Experience Experts (GHLEE) Monash Addiction/Turning Point National Aboriginal Community Controlled Health Organisation (NACCHO) Relationships Australia Wesley Mission
<b>Academics</b>	Associate Professor Dr Charles Livingstone Emeritus Professor Mike Daube Professor Dan Lubman AM Professor Samantha Thomas
<b>Online</b>	Amazon Apple Digital Industry Group Inc. (DIGI) Disney/ESPN Google Interactive Advertising Bureau (IAB) (on behalf of its members) Meta Netflix Snap TikTok
<b>Outdoor</b>	Outdoor Media Association (on behalf of its members)
<b>Racing and breeding</b>	Australian Trainers Association

Stakeholder Group	List of Stakeholders
	<ul style="list-style-type: none"> <li>Canberra Racing</li> <li>Greyhound Racing NSW</li> <li>Greyhound Racing SA</li> <li>Greyhound Racing Victoria</li> <li>Greyhounds Australasia</li> <li>Harness Racing Australia</li> <li>Harness Racing SA</li> <li>Harness Racing Victoria</li> <li>NSW Greyhound Breeders Owners and Trainers' Association</li> <li>Racing and Wagering Western Australia</li> <li>Racing Australia</li> <li>Racing NSW</li> <li>Racing Queensland</li> <li>Racing SA</li> <li>Racing Victoria</li> <li>Tasracing</li> <li>Thoroughbred Breeders Australia</li> <li>Thoroughbred Racing Northern Territory</li> </ul>
<b>Sports</b>	<ul style="list-style-type: none"> <li>Australian Football League (AFL)</li> <li>Coalition of Major Professional and Participation Sports (COMPPS)</li> <li>Cricket Australia</li> <li>Football Australia</li> <li>National Rugby League (NRL)</li> <li>Rugby Australia</li> <li>Tennis Australia</li> </ul>
<b>Wagering</b>	<ul style="list-style-type: none"> <li>Australian Bookmakers Association (ABA)</li> <li>Betfair/Crown Resorts</li> <li>Betr (Blue Bet)</li> <li>Dabble</li> <li>Entain</li> <li>PalmerBet</li> <li>PointsBet</li> <li>Racing and Wagering Western Australia</li> <li>Responsible Wagering Australia (on behalf of its members)</li> <li>Sportsbet</li> <li>Tabcorp</li> </ul>
<b>Publishing</b>	<ul style="list-style-type: none"> <li>News Corp Australia</li> </ul>

# Appendix C - Current advertising restrictions

The rules that relate to the scheduling of advertising and content are set out in a number of co- and self-regulatory codes of practice.

## Co-regulatory – Broadcasting codes of practice

The *Broadcasting Services Act 1992* (BSA) enables television and radio broadcasters to develop codes of practice that are applicable to the broadcasting operations for the specified broadcasting sector. Commercial radio and television, community radio and television, subscription television, and the ABC and SBS have each developed codes of practice for their sector.

The co-regulatory codes for each sector are developed in consultation with the Australian Communications and Media Authority (ACMA) and are periodically reviewed to ensure that they continue to reflect community standards. The ACMA maintains a register of all the codes of practice on its website.

The broadcasting codes include rules relating to the amount, scheduling and placement of advertising as relevant to each sector. For example, the Commercial Television Code of Practice specifies hourly limits for advertising on its primary and multi-channels, including:

- on average no more than 13 minutes between 6:00 pm and midnight outside election periods; and
- on average no more than 14 minutes between 6:00 pm and midnight in election periods (provided that on average no more than 13 minutes per hour comprises advertising that is not political matter).

There are no specific limits to the amount of gambling advertising that can be broadcast each hour.

There are no limits to the amount of advertising on commercial radio and subscription television. These codes do require that advertisements be easily identifiable and that they consider the intellectual and emotional maturity of the intended audience.

The codes include procedures for dealing with complaints. In the first instance, complaints about matters covered by a code must be submitted in writing to the relevant broadcaster within 30 days of the broadcast at issue. If a complainant has not received a response within 60 days, or the complainant is not satisfied with the response provided, then they may refer the matter to the ACMA.

## Self-regulatory – Advertising content codes of practice

The content of advertisements is primarily regulated by the codes of practice developed by the Australian Association of National Advertisers (AANA) and administered by Ad Standards. These codes are platform-neutral and include the AANA Code of Ethics, the AANA Wagering Advertising Code, and the AANA Children's Advertising Code.

The AANA Code of Ethics applies to most advertising, including relevant online advertising, and contains a range of provisions relating to taste and decency, including that advertising shall not depict material contrary to prevailing community standards on health and safety.

Complaints about the content of gambling advertisements, including gambling advertisements, can be directed in writing to Ad Standards for consideration by the Ad Standards Community Panel (the Panel).

## Gambling advertisement restrictions

The broadcasting codes of practice include rules for the placement and scheduling of gambling advertisements, including restrictions around children's programs and live sporting events. The new rules, made in 2018, supplemented existing gambling advertising restrictions during live sport on broadcasting services and introduced new rules for online services in acknowledgement of community concerns that

regular exposure to gambling advertisements during live sport could normalise gambling in the eyes of children.

In a 2019 analysis, the ACMA found that broadcasters were compliant with the new rules, which resulted in a marked decrease in the volume of gambling advertising during the regulated hours and live sports. However, the report showed that advertisements increased in other types of programming where relevant restrictions do not apply.

## Gambling advertisements during children's programs

Additional sets of regulatory standards and codes apply to restrict advertising and marketing to children.

Where applicable, the broadcasting codes of practice include restrictions around the placement of advertisements during children's programs. For example, the Commercial Television Industry Code of Practice states that gambling advertisements must not be broadcast:

- in any program classified G or lower between:
  - 6:00 am and 8:30 am; and
  - 4:00 pm and 7:00 pm; and
- during any program that is broadcast between 5:00 am and 8:30 pm and principally directed to children.

These prohibitions do not apply to advertisements broadcast in a news, current affairs or sports programs during those time periods. They also do not apply to advertisements relating to things such as government sanctioned lotteries, keno or contests, or to advertisements for entertainment or dining facilities where gambling may take place.

The Subscription Television Code of Practice states that the intellectual and emotional maturity of the intended audience must be considered when scheduling advertisements relating to betting or gambling and advertising within a block or blocks of programming directed at children.

Additionally, commercial broadcasters must adhere to the Broadcasting Services (Australian Content and Children's Television) Standards 2020 which includes protections for child viewers. While this does not include specific gambling restrictions, it does impose maximum advertising limits during programs classified C (Children) and rules around the use of popular characters in advertisements. The ACMA has responsibility for this standard.

Additionally, broadcasters and online services are not permitted to promote any gambling content that is socially irresponsible. The AANA Wagering Advertising and Marketing Communications Code has rules about the content of advertisements for betting services.

The AANA Wagering Code states that gambling advertisements must not:

- be directed primarily to minors;
- depict a person aged 18-24 years old engaged in wagering activities;
- state or imply a promise of winning; or
- state or imply a link between wagering and sexual success or enhanced attractiveness.

The AANA Wagering Code also provides that gambling advertising must not portray, condone or encourage:

- wagering in combination with the consumption of alcohol;
- participation in wagering activities as a means of relieving financial or personal difficulties;
- excessive participation in wagering activities; or
- peer pressure to wager.

Ad Standards is responsible for compliance matters under this regime.

## Gambling advertisements during live sport events

The broadcasting codes of practice restrict gambling promotions, at the noted time periods, during the live coverage of sporting events. These restrictions apply to most broadcasters, including commercial radio and television, subscription television, and the SBS. These rules do not apply to telephone betting services, pay-per-view broadcasting, and subscription television sports channels with a low audience share.

The rules for live sport differ depending on whether the broadcast coverage of the sport is provided between 5:00 am and 8:30 pm or between 8:30 pm and 5:00 am.

Between 5:00 am and 8:30 pm

- gambling advertising is prohibited from five minutes before the scheduled start of play until five minutes after conclusion of live coverage of play
- the promotion of betting odds is prohibited from 5 minutes before play until 5 minutes after play.
- the promotion of betting odds by commentators is prohibited from 30 minutes before play until 30 minutes after play.

Between 8:30 pm and 5:00 am

- gambling advertising and the promotion of odds is not permitted during play
- gambling advertising is permitted before and after play and during scheduled and unscheduled breaks
- the promotion of betting odds is permitted only before and after play, not in scheduled breaks
- the promotion of betting odds by commentators is prohibited from 30 minutes before play until 30 minutes after play.

At all times

- gambling advertising and promotion of betting odds during a live sporting event must be accompanied by a responsible gambling message
- gambling advertising must be socially responsible and not mislead the audience; not be directed to children; portray children as participating in betting or gambling; portray betting or gambling as a family activity; make exaggerated claims; promote betting or gambling as a way to success or achievement; or associate betting or gambling with alcohol.

Long-form live sporting events

- broadcasters must not show gambling advertising from 5 minutes before the start of the first event of the day until 8:30 pm when airing a long form live sporting event.
- after 8:30 pm gambling ads are permitted in accordance with rules applicable to the long-form event, for example during the Olympics, between each day, twilight and night session and not more than once every two hours as part of a distinct break of at least 90 seconds
- after 8:30 pm a promotion of betting odds by persons other than commentators is permitted during play as part of a distinct break of 90 seconds and in accordance with rules applicable to the long-form event, for example, during the Olympic Games not more than once every 3 hours on each day of competition.

The Broadcasting Services (Online Content Services Provider Rules) 2018 replicate the restrictions on gambling advertising during live sport in the broadcasting codes and include requirement for the keeping of records that must be provided to the ACMA upon request.

The Online Rules apply to any online content service that provides live coverage of sporting events. This includes but is not limited to:

- broadcaster's online services or Broadcast Video On Demand (BVODs) providing online streamed content related to their broadcast content
- subscription video on demand services (SVODs) providing streaming services for a range of sports
- social networking services providing live coverage of sporting events.

The ACMA is responsible for compliance matters under both regimes.

## Gambling advertisements for illegal interactive gambling services

Part 7A of the *Interactive Gambling Act 2001* prohibits the advertising of prohibited or unregulated interactive gambling services on television, radio, in published material, and online to Australian audiences. This includes online casino-style gaming services (such as online blackjack, online poker, online roulette) and online betting services that accept in-play betting on sports events.

It means that websites designed for a specifically Australian audience will not be able to carry interactive gambling advertisements. There are exceptions, including political advertising, incidental or accidental advertising, and advertising in imported print publications or websites that are not aimed specifically at an Australian audience. The ACMA is responsible for monitoring compliance with this restriction.

# Appendix D – Summary of the AGRC research

The department commissioned the Australian Gambling Research Centre (AGRC) to analyse available data to estimate the potential socio-economic benefit of options for wagering advertising reform. This included benefits to wagerers, affected others, the community and government.

The AGRC was established under the Commonwealth *Gambling Measures Act 2012*. Its gambling research program reflects the Act, embodies a national perspective and has a strong family focus. Its work forms part of the functions of the Australian Institute of Family Studies (AIFS).

The AGRC provided its final report to the department on 18 July 2024. It has been used by the department to provide an estimate of the benefit to Australians in this Impact Analysis. While the report has not been published, this section provides a summary of the options considered, the methodology used, the key findings, and limitations with the analysis.

## Options considered

The AGRC report considered 3 options for wagering advertising reform informed by the Online Gambling Inquiry.

Option A comprised a package of measures broadly in line with Phase 1 and Phase 2 of the Online Gambling Inquiry's recommendation and assumed an advertising reduction of:

- 100% on online platforms, including social media
- 28% on television, including associated streaming services
- 25% on radio
- 80% through betting affiliates

Option B comprised a strengthened package of measures in line with the Online Gambling Inquiry, particularly with respect to television, which assumed an advertising reduction of:

- 100% on online platforms, including social media
- 49% on television, including associated streaming services
- 23% on radio
- 80% through betting affiliates

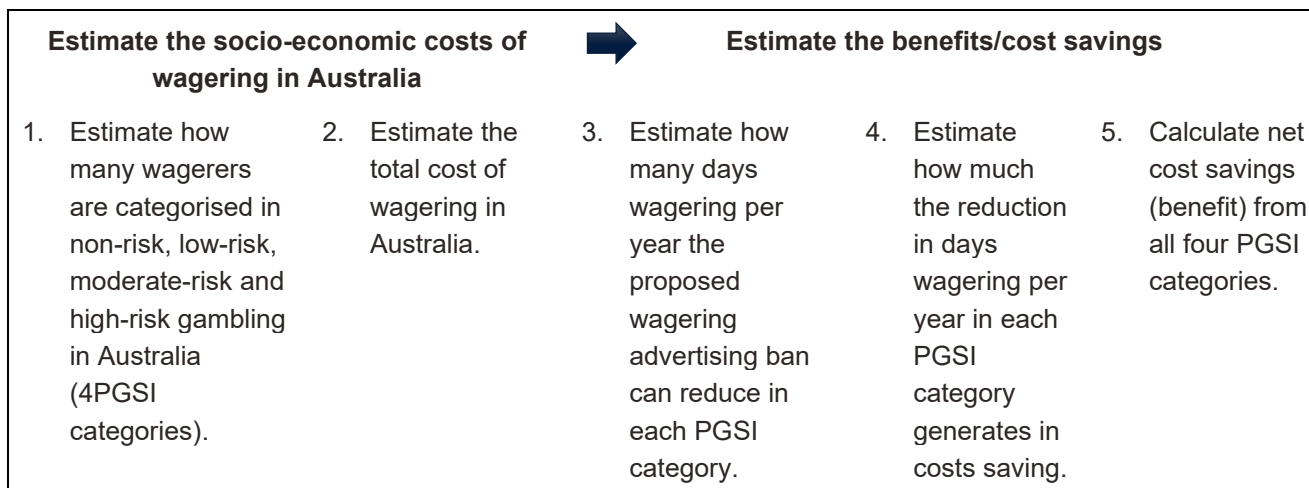
Option C comprised a full ban as recommended by the Online Gambling Inquiry, which assumed a 100% advertising reduction across all platforms.

## Methodology

The total cost of wagering in Australia was estimated first, to derive the benefit of the wagering advertising reform options.

It is important to note that in this report the costs of wagering mean the costs of wagering loss and monetised value of wagering harms. The term does not mean the costs of providing wagering services.

Outlined below are the steps that were taken to estimate the socio-economic costs of wagering in Australia (steps 1 to 2) and the benefits (cost savings) due to the proposed wagering advertising ban (steps 3 to 5).



The costs associated with wagering harm were disaggregated in to 4 at-risk gambling categories as measured by the Problem Gambling Severity Index (PGSI): non-risk, low-risk, moderate-risk and high-risk (problem) gambling.

## Findings

The AGRC report found the total cost of wagering in Australia for 2023 was \$26.7 billion, with the following estimated socio-economic benefits for each option considered:

- Option A – \$117.6 million
- Option B – \$182.2 million
- Option C – \$332.1 million

The report provides evidence that a reduction in wagering advertising could mitigate some harmful effects associated with wagering and generate a socio-economic benefit in Australia.

The AGRC also concluded the extent to which the proposed reduction in wagering advertising is sufficient to mitigate harmful effects should be subject to monitoring and evaluation, including (based on international experience) monitoring of the wagering industry’s strategies to navigate the ban (e.g. increase in direct messaging) to inform need for further adjustments of the phased approach.

## Limitations

The AGRC notes the estimates in its report are likely to be an underestimate of socio-economic benefits due to limitations in available data and methodology. These limitations include:

- The data sources used for this analysis (HILDA, NGTS, CAS and H2 Gambling Capital data) all have different populations and sampling methods, which introduces a lack of consistency.
- The prevalence of gambling and gambling harms in the HILDA data may be an underestimate compared to other prevalence studies – for example, the prevalence of wagering in HILDA is 8%, whereas a 2019 national gambling prevalence study with a sample of 15,000 Australian adults representative of the population found the prevalence of race betting to be 16.8% and sports betting 9.6%.
- Given estimates of the cost of wagering and the socio-economic benefits from a wagering advertising ban were estimated to the prevalence figures from HILDA, both are likely underestimates.
- Due to limitations of the data, several socio-economic costs related to harm associated with wagering (and therefore benefits due to a wagering advertising ban) were unable to be estimated. These include crime (legal costs, cost to business), costs of job loss and job change, productivity loss for study (unable to complete a degree for example), emotional costs after separation, suicide (ideation, attempt, completion), debt prior to bankruptcy, loss of assets, physical health (e.g. loss of sleep), tobacco use, IPV

and domestic violence, the cost to the health system, and the cost to governments at all levels (e.g. justice system).

- Due to data limitations, costs and benefits associated with those who started or stopped wagering due to the ban were not estimated.
- This study only estimated the short-term impacts of a partial wagering advertising ban.
- The proposed plan ruled out restricting wagering advertising through direct messaging, which the researchers found was a significant and strong predictor in wagering participation.