

Friday, 20 April 2018

Australian betting market dominated by racing

Australia's multi-billion dollar betting industry has undergone great change in recent years as the ubiquity of smartphones (86% of Australians now use a smartphone as their main phone) and the prevalence of sports betting apps allows Australians to gamble from the comfort of their own couch, on the wide open road, or even from the stands at the game.

To understand the scope of gambling in Australia means gaining insight into what Australians bet on and who is doing the betting. The [Roy Morgan Gambling Currency Reports](#) delve into Australian gambling habits in depth including detailed analysis of betting and sports betting, poker machines, casino table games, keno, lotteries and scratchies.

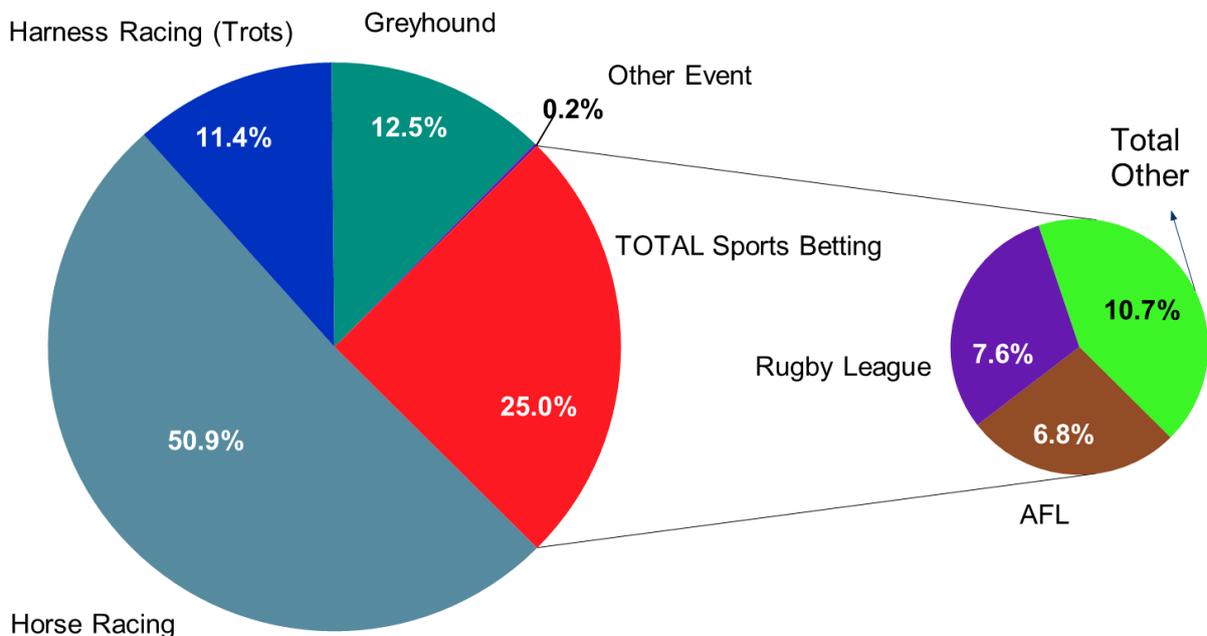
Sports betting has gained prominence in recent years but analysing the overall betting market shows that racing – whether horse racing, harness racing or greyhound racing – still commands nearly 75% of the Australian betting market.

Horse racing is the dominant form of betting comprising 50.9% of the betting market with a further 12.5% bet on greyhound racing and 11.4% bet on harness racing.

Sports betting itself equals 25% of the money Australians bet in 2017 and this is dominated by the two major football codes which comprise more than half of Australian sports betting. 7.6% of money bet in Australia is on NRL/State of Origin markets just ahead of the 6.8% bet on AFL related events.

The balance of 10.7% is spread around all other sports including tennis, cricket, basketball, swimming, football, netball, cycling and many others.

Australian betting market – December 2017



Base: Australians aged 18+

Source: Roy Morgan Single Source Australia, January 2017 - December 2017, Base: Australians aged 18+, n=14,422.

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Australians aged 35-64 and those from NSW and Victoria most likely to bet

Australians who like a bet, whether on the Melbourne Cup, Australian Open tennis, football codes of one sort or another, Ashes cricket, big sporting events such as the Olympics, Commonwealth Games or World Cup or a myriad of other sports available here and overseas, come in all shapes and sizes.

Analysis of the 10.5% of Australians who've had a bet in the last three months reveals there are noteworthy differences with the proportion of Australians having a bet by age increasing until Australians reach retirement age at which point the likelihood of having a bet plunges.

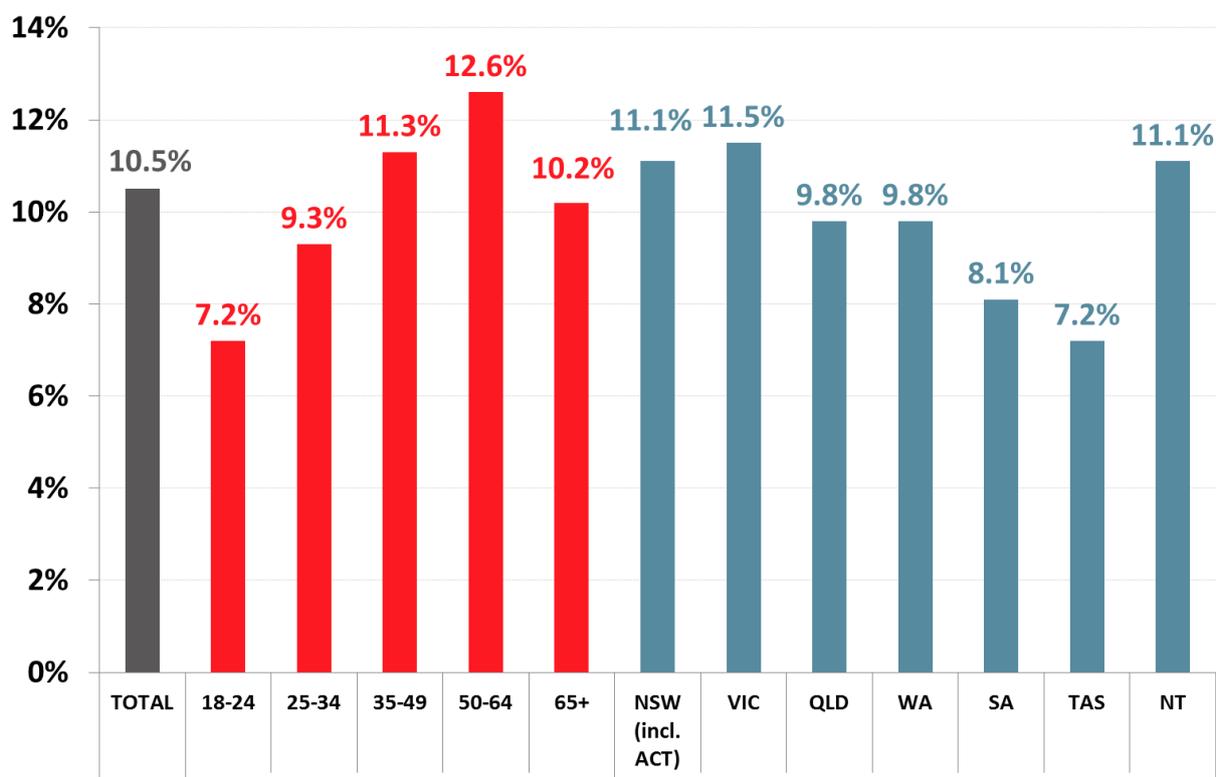
Only 7.2% of Australians aged under 25 have had a bet in the last three months compared to 9.3% of those aged 25-34 years old, 11.3% of those aged 35-49 years old and 12.6% of 50-64 year olds – the highest of any age group, before dropping to 10.2% of Australians of retirement age (65+).

Analysing betting patterns by State & Territory shows a rougher co-relation. Australians in our two largest States are most likely to bet: 11.5% of Victorians and 11.1% of those from New South Wales (including ACT) have had a bet in the last three months.

The likelihood of betting is underneath the national average in the all other States with 9.8% of those in medium-sized Queensland and Western Australia having a bet, 8.1% of South Australians and only 7.2% of those in Australia's smallest State of Tasmania.

The Northern Territory, which is home to many of Australia's sports betting agencies due to favourable gambling laws, bucks this trend with 11.1% of NT residents having a bet in the last three months.

Australians who've had a bet in the last three months: Age & State



Source: Roy Morgan Single Source Australia, January 2017 - December 2017, **Base:** Australians aged 18+. n=14,422.

Michele Levine, CEO, says Australians love of sport is well-known and for a sizeable number of Australians having a punt adds an extra something to the contest:

“Over 2 million Australians aged 18+ (10.5%) have had a bet in the last three months whether on horse racing, greyhounds, or sporting events like the AFL, NRL, tennis, cricket or any of thousands of other sports available to bet on whether the sporting contest is undertaken here in Australia or almost anywhere around the world.

“It is hardly surprising that Australians having a bet are far more likely to be men (13.9% of Australian men aged 18+) than women (7.3%) whilst there is a strong co-relation between age and the likelihood of having a bet. 12.6% of Australians aged 50-64 years old have had a bet in the last three months – clearly higher than any other age group compared to only 7.2% of younger Australians aged 18-24 years old.

“Intriguingly the likelihood of having a bet also co-relates fairly well to the size of the State an Australian is from. The most likely Australians to have a bet are those from Australia’s largest States of New South Wales (11.1%) and Victoria (11.5%) whilst the least likely are from Australia’s two smaller States of South Australia (8.1%) and Tasmania (7.2%).

“This disparity is likely related to the lack of professional sporting content available in smaller markets. As a comparison there are 17 professional AFL/NRL/Super Rugby/A-League clubs in New South Wales, 14 in Victoria, 7 in Queensland and 3 each in Western Australia and South Australia. There are no professional football clubs in Tasmania.

“The relatively high proportion of Northern Territorians who’ve had a bet at 11.1% does buck this trend, however its worth remembering that the Northern Territory has long been a home to many Australians sports and horse racing betting companies due to the favourable laws in the jurisdiction.

“To gain deeper insights into who the Australians that like to have a bet are, and more importantly, how much they are spending and betting when taking a punt, the series of [Roy Morgan Gambling Currency Reports](#) are an essential analytical resource to learn more about Australian gamblers and punters.

“The Roy Morgan Gambling Currency Reports cover not only horse racing and sports betting, but also casino table games, keno, lotteries, scratchies tickets and poker machines.”

View Roy Morgan’s [Gambling Currency Reports](#) including for detailed currency reports for [Betting and Sports Betting](#), [Casino Tables Games](#), [Keno](#), [Lotteries and Scratchie tickets](#) and [Poker Machines](#).

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About Roy Morgan

Roy Morgan is the largest independent Australian research company, with offices in each state of Australia, as well as in the United States and the United Kingdom. A full service research organisation specialising in omnibus and syndicated data, Roy Morgan has over 70 years’ experience in collecting objective, independent information on consumers.

Margin of Error

The margin of error to be allowed for in any estimate depends mainly on the number of interviews on which it is based. Margin of error gives indications of the likely range within which estimates would be 95% likely to fall, expressed as the number of percentage points above or below the actual estimate. Allowance for design effects (such as stratification and weighting) should be made as appropriate.

Sample Size	Percentage Estimate			
	40%-60%	25% or 75%	10% or 90%	5% or 95%
5,000	±1.4	±1.2	±0.8	±0.6
10,000	±1.0	±0.9	±0.6	±0.4
20,000	±0.7	±0.6	±0.4	±0.3
50,000	±0.4	±0.4	±0.3	±0.2