

Monday, 25 June 2018

## The Real Gambling Behaviours of Australians

**New Research from Roy Morgan shows that 49.1% of adult Australians gambled in an average three-month period in the 12 months to March 2018, down from 50.6% a year ago, following a gradually decreasing trend in the gambling industry across all categories. This decline is despite the growing proliferation of gambling options, such as online and mobile betting.**

These are the latest findings from the Roy Morgan Single Source database, built from surveys of over 50,000 consumers per annum, including detailed in-depth questioning of over 7,000 gamblers in person within their own homes.

Gambling takes many forms, from rolling the dice on the craps table, to sitting in a pub with a sports betting app open on your phone, or just buying scratchies for the Christmas crackers over the holidays. Using Roy Morgan's in-depth gambling data, we're able to observe not only which gambling categories a person participates in, but also those which they do not participate.

The Venn diagram below shows the complexity of the gambling ecosystem. In an average three month period:

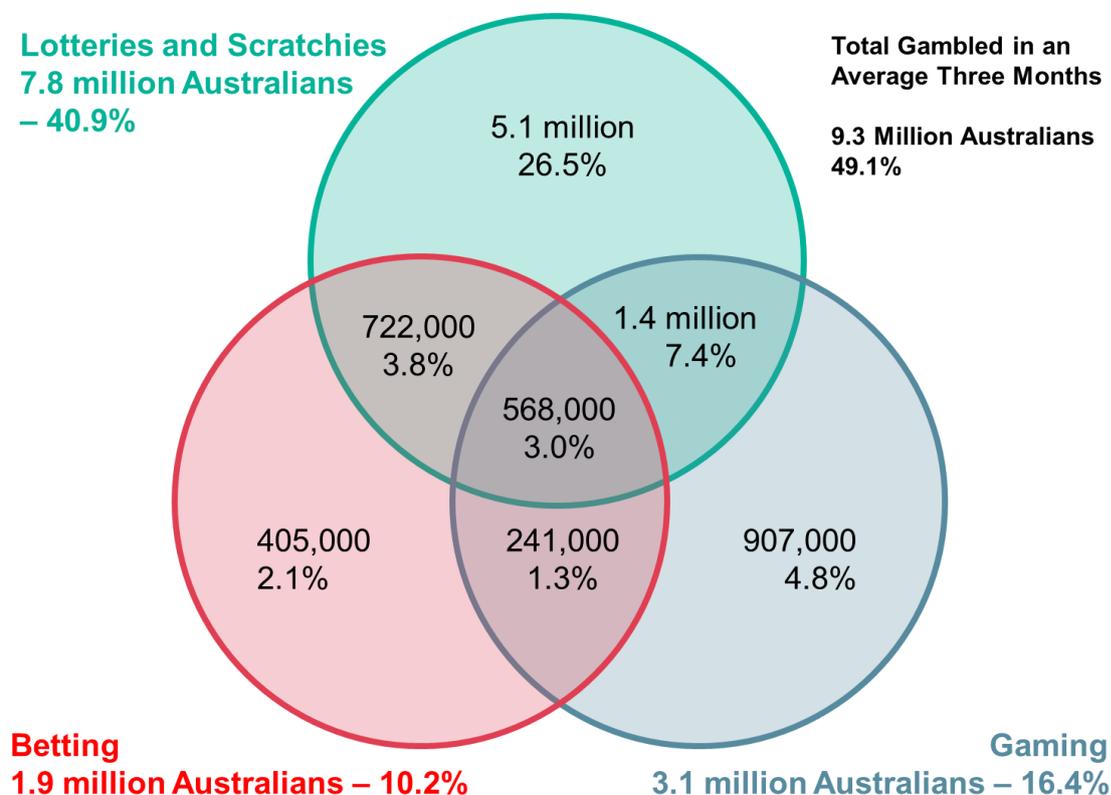
- 7.8 million Australians play Lottery or Scratchies (for 5.1 million Australians that is the only gambling that they do)
- 1.9 million Australians bet (for 405,000 of them it is the only gambling they do)
- 3.1 million Australians engage in some level of gaming, such as poker, roulette and other casino games (for 907,000 it is the only gambling which they do)

### Gambling Participation in an Average Three Months

**Lotteries and Scratchies**  
**7.8 million Australians**  
**– 40.9%**

**Total Gambled in an Average Three Months**

**9.3 Million Australians**  
**49.1%**



Source: Roy Morgan Single Source Australia, April 2017 - March 2018  
Base: Australians aged 18+. n = 14,290

As well as those who only gamble within their own categories, the data allows us to explore further, and observe that:

- 722,000 engage in both betting and lotteries/scratchies, but not gaming
- 241,000 engage with betting and gaming but not lotteries/scratchies
- 1.4 million engage in gaming and lotteries but not betting
- 568,000 people, or 3% of the Australian population, engage in all three types of gambling, as represented in the centre of the chart

This overlap is a rare and valuable insight into the gambling behaviours of various demographics in Australia, an outlook unique to Roy Morgan's Single Source database. These figures can also be compared historically to note changing trends and identify disruptions in various parts of the gambling ecosystem. For instance, our data revealed that the recent growth online betting has been spurred on by the [growth of mobile betting](#), while the proportion of punters using computers to place an online bet is virtually unchanged after six years.

**Michele Levine, CEO, Roy Morgan, says:**

*"Gambling is now an activity which nearly half of all Australians participate in within a 3-month period, but this statistic alone does not do justice to the varying behaviours of those millions of gamblers. They vary from casual scratchie buyers to work friends betting on their footy team to wealthy businessmen at poker tables.*

*"Analysis of deep consumer data is needed to get a clear picture of Australia's gamblers, and that picture looks to challenge some of the current understandings of the industry. Gambling in special contexts, such as casino or online betting, need to be examined as part of a broader context, the type of context that only Roy Morgan's Single Source, with its deep view of the Australian gambler, can provide.*

*"For instance, looking at the upward trend in online sports betting, this powerful growth is driven by mobile phone betting replacing traditional bookies for convenience, accessibility and breadth. Punters are now able to gamble on the AFL, NFL, Premier League, NBA, and more all at the same time, place, and at the best odds available to them.*

*"Of the 3.4 million people who place at least one bet each year, 34.1% of them bet online, which is notably higher than other online gambling categories, such as online poker (6.2%) and online casino games (13.2%).*

*"Using Roy Morgan's deep data, organisations can see a comprehensive breakdown of the demographics represented within each gambling category, as well as the deep psychographic drivers of choice and behaviours. Our online store offers profiles for different gambling categories, such as [Online Bettors](#), [Keno Players](#) and [Poker Machine Players](#), as well as our [Gambling Currency Report](#)."*

To learn more about Roy Morgan's gambling data, call (+61) (3) 9224 5309 or email [askroymorgan@roymorgan.com](mailto:askroymorgan@roymorgan.com).

Please click on this link to the [Roy Morgan Online Store](#).

View our extensive range of Gambling Profiles, including [Online Bettors](#), [Keno Players](#), [Poker Machine Players](#) and [more](#). These profiles provide a broad understanding of the target audience, in terms of demographics, attitudes, activities and media usage in Australia.

#### 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

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