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A GUIDE TO AUSTRALASIA'S GAMBLING INDUSTRIES

Facts, Figures and Statistics

CHAPTER NINE

Gambling Participation

2018/19

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A Guide to Australasia's Gambling Industries

Published and Prepared by the Australasian Gaming Council (AGC).



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Chapter 9

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Version Control

Version	Date	Explanation
2015-16 (2.0)	May 2017	2015-16 Edition - updated data for Northern Territory.
2015-16 (3.0)	July 2018	2015-16 Edition - updated data for Queensland and Tasmania.
2017-18	July 2020	2017-18 Edition
2018-19	September 2021	2018-19 Edition

GAMBLING PARTICIPATION IN AUSTRALIA (NATIONAL)

In Australia the legal age for participation in gambling is 18 years. There have been relatively few national gambling prevalence studies undertaken, (although most states/territories undertake regular surveys of this nature). Those that are available have been published by the Productivity Commission (PC) in 1999 and 2010; the Australian Gambling Research Centre (AGRC) in 2017; and Gambling Research Australia (GRA) in 2014 and 2021 - this latter series as part of GRA's exploration of internet gambling.

Productivity Commission (PC) 1999-2009

In 1999, the Productivity Commission (PC) reported that about 82% of Australian adults participated in gambling activities in the 1997-98 period (with some 40% gambling regularly - at least once per week). About 20% of the population were found at this time to be regular, non-lottery gamblers.¹ In 2010 the PC undertook a meta-analysis of existing state/territory surveys, noting stabilisation in growth rates and reducing participation levels nationwide. This report found that approximately 70% of Australian adults participated in some form of gambling.² Since that time most state/territory surveys show further participation reductions.

Table 9-1 Gambling participation (all forms) as a % of the adult population (18+) by state/territory (1999-2021)

	ACT (%)	NSW (%)	NT (%)	QLD (%)	SA (%)	TAS (%)	VIC (%)	WA (%)
1999³	80	80	80	86	77	77	81	84
2000	-	-	-	-	-	-	-	-
2001	73	-	-	85	-	-	-	-
2002	-	-	-	-	-	-	-	-
2003	-	-	-	-	-	-	77	-
2003-04	-	-	-	80	-	-	-	-
2004	-	-	-	-	-	-	-	-
2005	-	-	73	-	70	-	-	-
2006	-	69	-	-	-	85	-	-
2006-07	-	-	-	75	-	-	-	-
2008	-	-	-	-	-	71	73	-
2008-09	-	69	-	75	-	-	-	-
2009	69	-	-	-	-	-	-	-
2010-11⁴	60	62	67	69	62	65	62	68
2011	-	65	-	-	-	65	-	-
2011-12	-	-	-	74	-	-	-	-
2012	-	-	-	-	68	-	-	-
2013	-	-	-	-	-	61	-	-
2014	55	-	-	-	-	-	70	-
2015	-	-	68	-	-	-	-	-
2016-17	-	-	-	71	-	59	-	-
2017-18	-	-	-	-	65	-	-	-
2018-19	60	53	72	-	-	-	69	-
2019⁵	53	55	56	61	57	55	54	63
2019-20	-	-	-	-	-	47	-	-

Source: Productivity Commission (2010) *Gambling, Report no. 50*, Canberra, Updates post 2009 compiled by the AGC. Highlighted lines represent results from national studies. All other results reported are from state/territory surveys.

¹ Productivity Commission (1999) *Australia's Gambling Industries, Report No 10*, Ausinfo, Canberra. Volume 1, p12.

² Productivity Commission (2010) *Gambling, Report no. 50*, Canberra p5.

³ Productivity Commission (1999) *Australia's Gambling Industries, Report No 10*, Ausinfo, Canberra.

⁴ Hing, N., Gainsbury, S., Blaszczynski, A., Wood, R., Lubman, D. and Russell, A. (2014) *Interactive Gambling*, Gambling Research Australia.

⁵ Hing, N., Russell, A., Browne, M., Rockloff, M., Greer, N., Rawat, V., Stevens, M., Dowling, N., Merkouris, S., King, D., Breen, H., Salonen, A. & Woo, L. (2021) The second national study of gambling in Australia (2019-20), Gambling Research Australia. Please note that differences between national and state/territory surveys (even where conducted in similar timeframes) may occur due to differences in study methodology and the gambling forms included in the surveys.

Gambling Research Australia (GRA) 2010-11

A national study for GRA published in 2014 established a gambling prevalence figure of 64.26%⁶ of Australian adults (participating in some form of gambling at least once during the 2010-11 period). This study showed significant declines in participation rates for most gambling forms from PC data for the 1999 period - the exception being sports betting (where participation rates more than doubled - albeit from a low base).

Table 9-2 Past Year Participation in Different Forms of Gambling Amongst the Australian Adult Population (2010-2011)

Form of Gambling	Weighted % of Population
Bingo	2.9
Casino table games	8.7
Electronic Gaming Machines	19.4
Horse or dog race betting	22.4
Instant scratch tickets	31.5
Keno	8.9
Lottery, lotto or pools tickets	43.2
Other games of skill	1.6
Poker	5.9
Sports betting	13.3

Source: Hing, N., Gainsbury, S., Blaszczynski, A., Wood, R., Lubman, D. and Russell, A. (2014) *Interactive Gambling, Gambling Research Australia*.

Gambling Research Australia (GRA) 2019-20

A second national study of interactive gambling in Australia was published by Gambling Research Australia (GRA) in 2021⁷. This research reported that national gambling participation (all modes) had decreased from 64.3% in 2010-11 to an estimated 56.9% in 2019.

In 2019, lotteries remained the most popular activity (41.5%), followed by race betting (16.8%), EGMs (16.4%), instant scratch tickets (15.7%), sports betting (9.6%), keno (7.7%), casino games (6.0%), poker (3.5%) bingo (2.4%), and betting on novelty events (1.6%). Newer gambling forms had low participation: esports betting (0.6%), fantasy sports betting (0.6%), skin gambling (0.5%) and loot box purchasing (2.7%).

Table 9-3 Past Year Participation in Different Forms of Gambling Amongst the Australian Adult Population (2019)

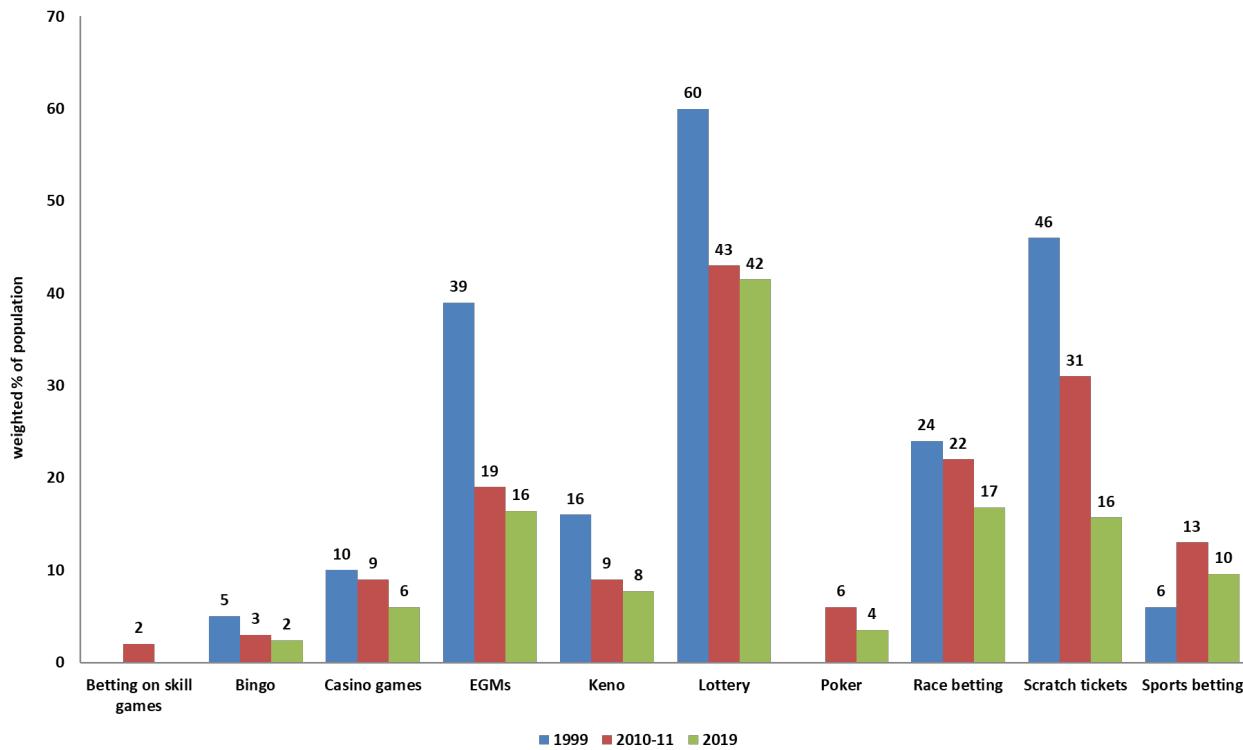
Form of Gambling	Weighted % of Population
Bingo	2.4
Casino table games	6.0
Electronic Gaming Machines	16.4
Horse or dog race betting	16.8
Instant scratch tickets	15.7
Keno	7.7
Lottery, lotto or pools tickets	41.5
Other games of skill	N/A
Poker	3.5
Sports betting	9.6

Source: Hing, N., Russell, A., Browne, M., Rockloff, M., Greer, N., Rawat, V., Stevens, M., Dowling, N., Merkouris, S., King, D., Breen, H., Salonen, A. & Woo, L. (2021) *The second national study of gambling in Australia (2019-20)*, Gambling Research Australia

⁶ Hing, N., Gainsbury, S., Blaszczynski, A., Wood, R., Lubman, D. and Russell, A. (2014) *Interactive Gambling, Gambling Research Australia* p 80.

⁷ See Hing, N., Russell, A., Browne, M., Rockloff, M., Greer, N., Rawat, V., Stevens, M., Dowling, N., Merkouris, S., King, D., Breen, H., Salonen, A. & Woo, L. (2021) *The second national study of gambling in Australia (2019-20)*, Gambling Research Australia <<https://www.gamblingresearch.org.au/publications/second-national-study-interactive-gambling-australia-2019-20>>

Figure 9-1 Comparing Australian National Gambling Participation Rates by Form of Activity (1999, 2010-2011 and 2019)



Source: Hing, N., Russell, A., Browne, M., Rockloff, M., Greer, N., Rawat, V., Stevens, M., Dowling, N., Merkouris, S., King, D., Breen, H., Salonen, A. & Woo, L. (2021) *The second national study of gambling in Australia (2019-20)*, Gambling Research Australia, Hing, N., Gainsbury, S., Blaszczynski, A., Wood, R., Lubman, D. and Russell, A. (2014) *Interactive Gambling*, Gambling Research Australia and Productivity Commission (1999) *Australia's Gambling Industries*, Report No 10, Ausinfo, Canberra.

Australian Gambling Research Centre (AGRC): Household, Income and Labour Dynamics in Australia (HILDA) Survey Data 2015

The Australian Gambling Research Centre (AGRC) has published national participation statistics drawn from the Household, Income and Labour Dynamics in Australia (HILDA) Survey series.⁸

Please note: HILDA data pertains to regular gamblers (adults who spent money on one or more gambling activities in a typical month).⁹

A 2017 AGRC report, analysing HILDA data, identified that an estimated 39% of Australian adults - 6.8 million people - gambled in a typical month of 2015 (i.e., regularly).

Among these 6.8 million regular gamblers, participation in lotteries was most common (76%), followed by instant scratch tickets (22%) and electronic gaming machines (21%). Approximately one third (38%) of gamblers participated in multiple activities.¹⁰

⁸ See Armstrong, A., & Carroll, M. (2017) *Gambling activity in Australia*. Melbourne: Australian Gambling Research Centre, Australian Institute of Family Studies. <https://aifs.gov.au/agrc/sites/default/files/publication-documents/rr-gambling_activity_in_australia_0.pdf>

⁹ Please note – less frequent gambling activity was not asked about in the HILDA survey.

¹⁰ Armstrong, A., & Carroll, M. (2017) *Gambling activity in Australia*. Melbourne: Australian Gambling Research Centre, Australian Institute of Family Studies p10.

Table 9-3 Estimated number and proportion of Australian adults who gambled in a typical month (2015)

Form of Gambling	Estimated Number .000	Australian Population %	Regular gambling population %
Bingo	186	1.1	2.7
Casino table games	192	1.1	2.8
Electronic Gaming Machines	1,418	8.1	20.8
Race betting	975	5.6	14.3
Instant scratch tickets	1,495	8.5	22.0
Keno	549	3.1	8.1
Lottery	5,186	29.6	76.2
Poker	132	0.8	1.9
Private betting	155	0.9	2.3
Sports betting	574	3.3	8.4
Any gambling	6,809	38.9	100

Source: Armstrong, A., & Carroll, M. (2017). *Gambling activity in Australia*. Melbourne: Australian Gambling Research Centre, Australian Institute of Family Studies. Note: Percentages are based on weighted data. Percentages may not total 100% due to rounding.

GAMBLING PARTICIPATION (LAND-BASED) IN AUSTRALIA BY STATE/TERRITORY

Overview and Notes

Australian states and territories routinely survey gambling prevalence and provide a wealth of information on gambling participation rates (by form, demographic, region etc...) The following information is provided as an overview. Methodological differences between surveys (even within jurisdictions) do however mean that comparisons over time should only be made with caution and not all gambling forms for which data is available are represented.

In more recent years, some Australian State/territories have reported on consumer participation in fantasy sports, online gambling and other emerging activities. An overview to some of the information available is provided in a further section of this chapter about participation rates in gambling via Internet or mobile technologies.

Gambling prevalence surveys also routinely provide detailed information about health and other correlates, consumer attitudes towards gambling and a range of other subjects. For more detailed information, recourse should be had to the original reports, the most recent of which are listed below.

State/Territory	Publication Date	Report
ACT	2019	<i>The 2019 ACT Gambling Survey</i> , ANU Centre for Gambling Studies, ACT Gambling and Racing Commission.
NSW	2019	<i>NSW Gambling Survey 2019</i> , NSW Responsible Gambling Fund.
NT	2019	<i>Northern Territory Gambling Prevalence and Wellbeing Survey Report 2018</i> , Menzies School of Health Research.
QLD	2018	<i>Queensland Household Gambling Survey (2016-17)</i> , Queensland Government.
SA	2019	<i>Gambling Prevalence in South Australia (2018)</i> , Department of Human Services, South Australia.
TAS	2021	<i>Fifth Social and Economic Impact Study of Gambling in Tasmania 2021, Volume 2: 2020 Prevalence Survey Report</i> , Tasmanian Department of Treasury and Finance.
VIC	2020	<i>Victorian population gambling and health study 2018–2019</i> , Victorian Responsible Gambling Foundation.
WA	N/A	N/A

Further notes to the data provided:

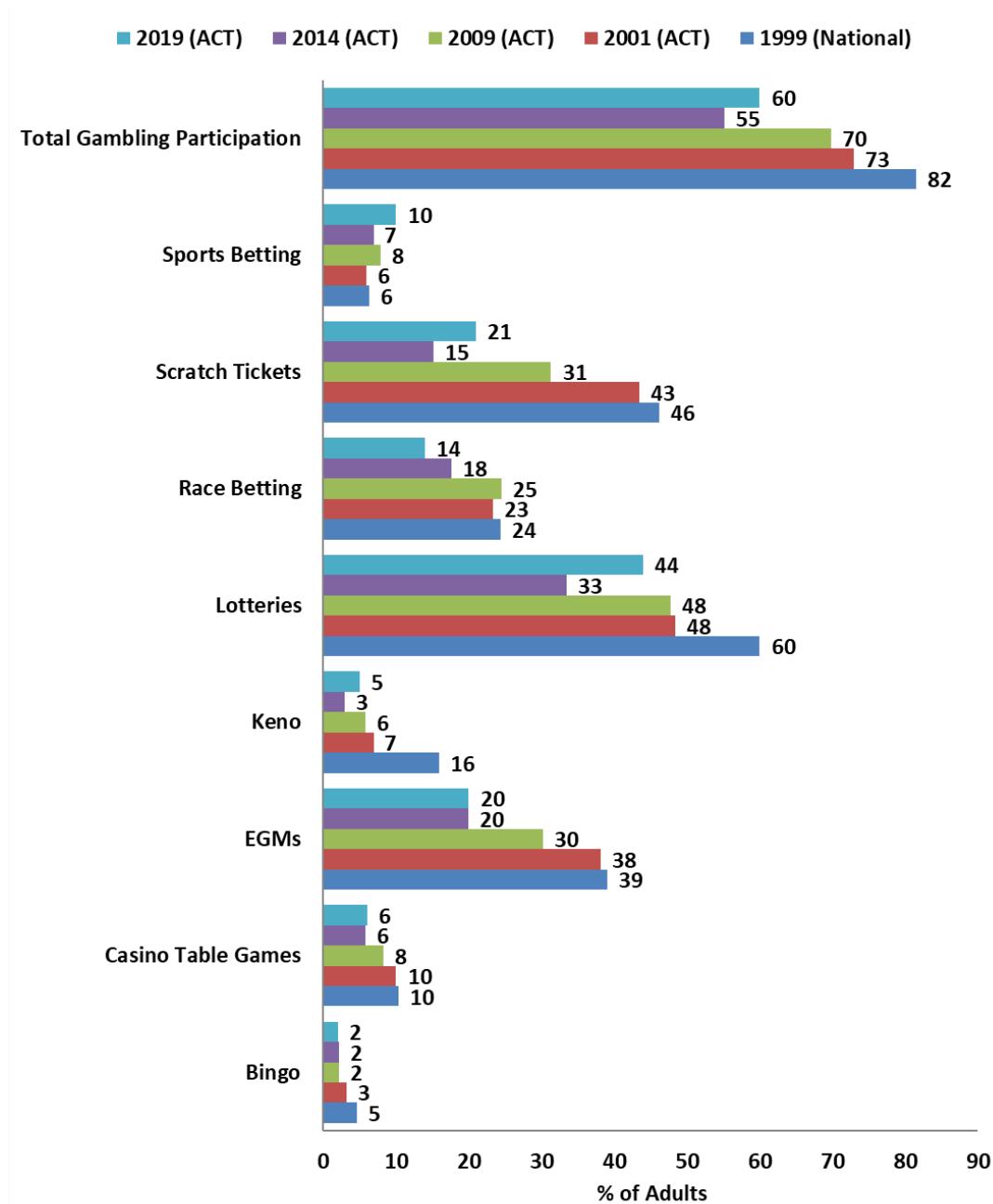
- Estimates of adult gambling prevalence (participation rates) in the following graphs refer to rates in gambling for the populations, period and jurisdiction indicated.
- 1999 figures are drawn from the Productivity Commission's (PC's) 1999 report¹¹ – which provided both national gambling participation estimates and state/territory participation estimates.
- Figures subsequent to 1999 are derived from available state/territory studies and are rounded to the nearest percentage.

¹¹ Productivity Commission (1999) *Australia's Gambling Industries*, Report No 10, Ausinfo, Canberra.

Australian Capital Territory

An ACT prevalence survey undertaken in 2001¹² reported that 72.9% of ACT adults had participated in at least one gambling activity in the previous 12-month period. A 2009 study¹³ reported a slight decrease in overall participation levels to 69.8%. A further decline was then found in 2014 with a participation rate of 55.1%¹⁴ and a small increase was subsequently found in 2019¹⁵ when overall gambling participation rates were reported as 60% of the adult population.

Figure 9-2 Australian Capital Territory Gambling Participation (Select Forms of Activity) 1999 -2019 as a percentile of the ACT Population 18+



¹² Australian Institute for Gambling Research (2001) *Survey of the Nature and Extent of Gambling and Problem Gambling in the ACT*, University of Western Sydney.

¹³ Davidson, T. and Rodgers, B. (2010) 2009 Survey of the Nature and Extent of Gambling, and Problem Gambling in the Australian Capital Territory, Australian National University.

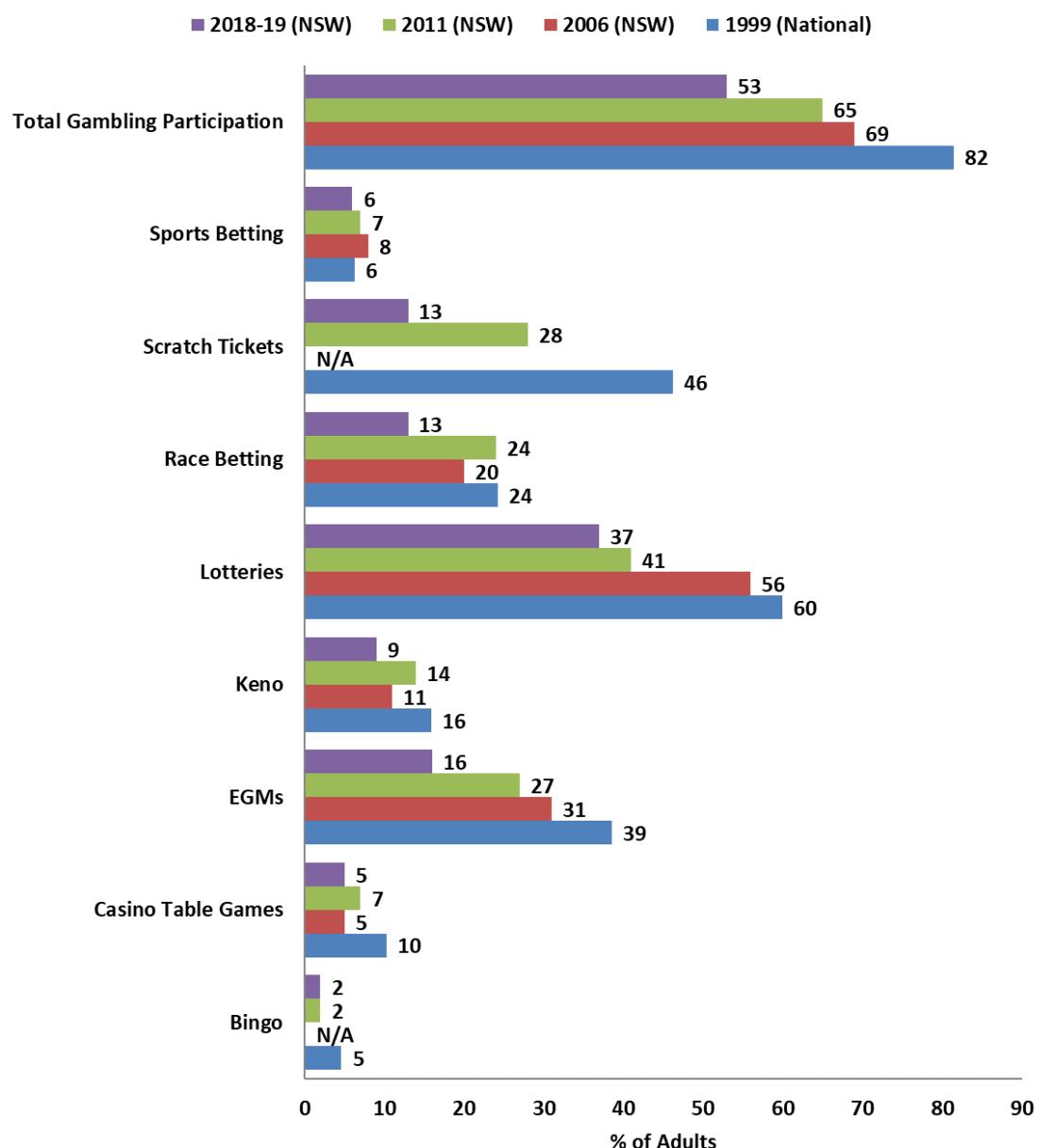
¹⁴ Australian National University (2015) *2014 Survey on Gambling, Health and Wellbeing in the ACT*, ACT Government.

¹⁵ Paterson, M., Leslie, P. and Taylor, M. (2019) *The 2019 ACT Gambling Survey*, ANU Centre for Gambling Studies, ACT Gambling and Racing Commission.

New South Wales

A 2011 NSW Gambling Prevalence Survey¹⁶ found that 65% of the state's adult population had gambled at least once during the previous year - representing a 4-percentage point decrease on the overall gambling participation rate found by a previous (2006) survey.¹⁷ The most recent survey in this jurisdiction, undertaken in 2018-19,¹⁸ reported a further significant decline in overall gambling participation to 53% of the adult population.

Figure 9-3 New South Wales Gambling Participation (Select Forms of Activity) 1999-2019 as a percentile of the NSW Population 18+



Note: Participation rates for lotteries and scratch tickets were not separated into individual activities in the 2006 survey.

¹⁶ Ogilvy Illumination (2012) *Prevalence of Gambling and Problem Gambling in New South Wales*, NSW Department of Liquor, Gaming and Racing.

¹⁷ AC Nielsen (2007) *Prevalence of Gambling and Problem Gambling in NSW – A Community Survey 2006*, NSW Office of Liquor, Gaming and Racing.

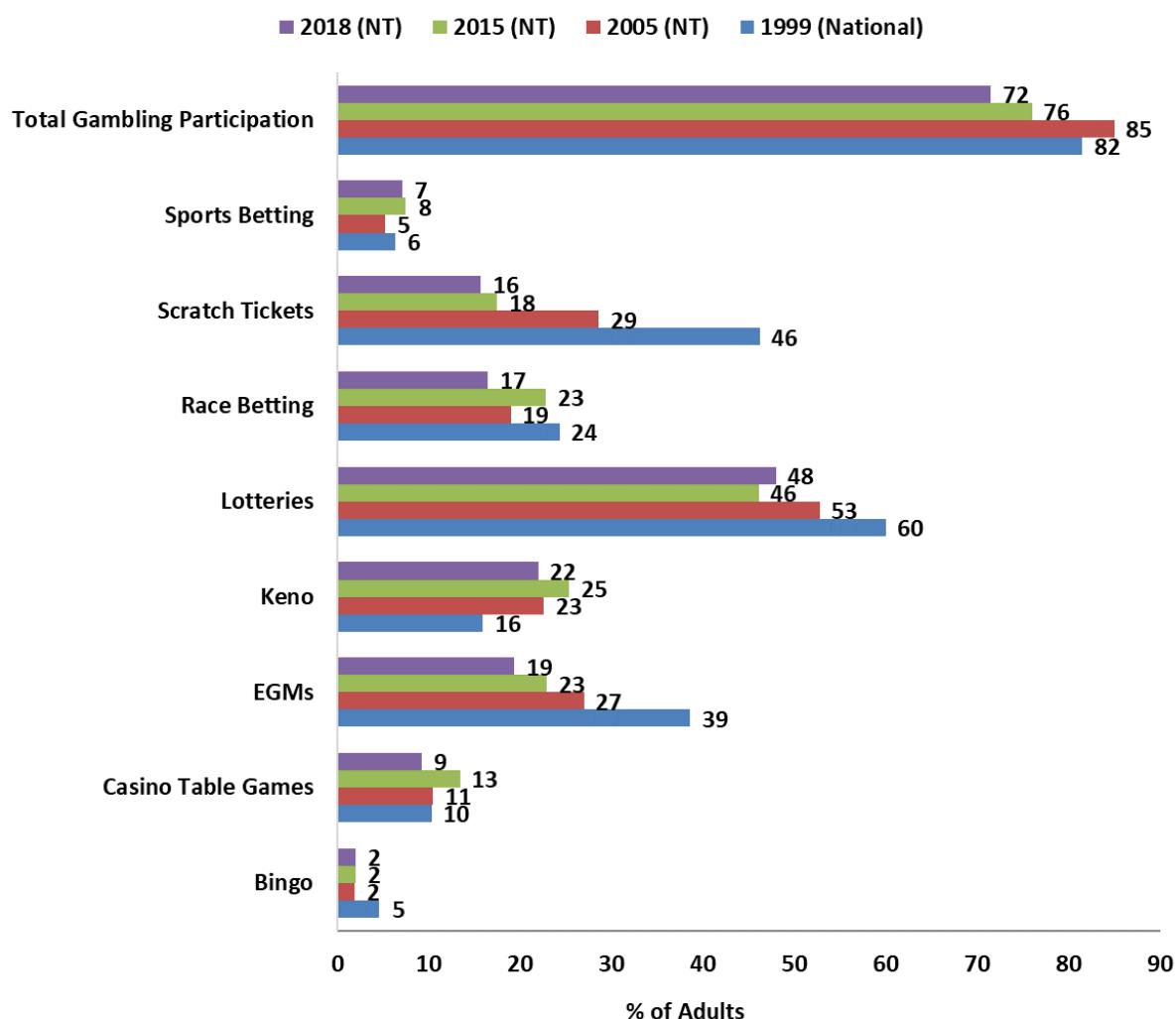
¹⁸ Browne, M., Rockloff, M., Hing, N., Russell, A., Boyle, Cailem Murray, Rawat, Vijay, Tran, Katherine, Brook, Kate and Sproston, Kerry (2019) *NSW Gambling Survey 2019*, NSW Responsible Gambling Fund.

Northern Territory

A Northern Territory prevalence study conducted in 2005¹⁹ found that 85% of adult residents participated in at least one gambling activity during the 12-month period preceding the survey (a figure including raffles and sweeps).²⁰ A decade on, the 2015 Northern Territory Gambling Prevalence and Wellbeing Survey Report noted that participation rates decreased significantly across all gambling activities – with the exception of racetrack and sports betting (which increased significantly), casino table games and Keno (which had non-significant increases).²¹

The most recent Northern Territory Survey was conducted in 2018. This report saw overall gambling participation in the state (inclusive of sweeps and raffles) as 71.5% of the population. All activities (excepting lotto, bingo, informal betting and non-sport betting) showed a decrease in the number of people gambling.²²

Figure 9-4 Northern Territory Gambling Participation (Select Forms of Activity) 1999-2018 as a percentile of the NT Population 18+



¹⁹ Charles Darwin University, School for Social and Policy Research and School of Health Sciences (2006) *Northern Territory Gambling Prevalence Survey 2005*.

²⁰ Please note: the figure provided for total gambling participation in this graph has previously excluded people who gambled on raffles and sweeps only. When included this group bring the total participation figure to 76% of the NT population in 2015 and 85% of the population in 2005. When raffles and sweeps are not included total participation rates for gambling recorded in the NT were 68.2% in the 2015 survey period and 73% in the 2005 survey period.

²¹ Stevens, M. (2017) Northern Territory Gambling Prevalence and Wellbeing Survey Report, Menzies School of Health Research.

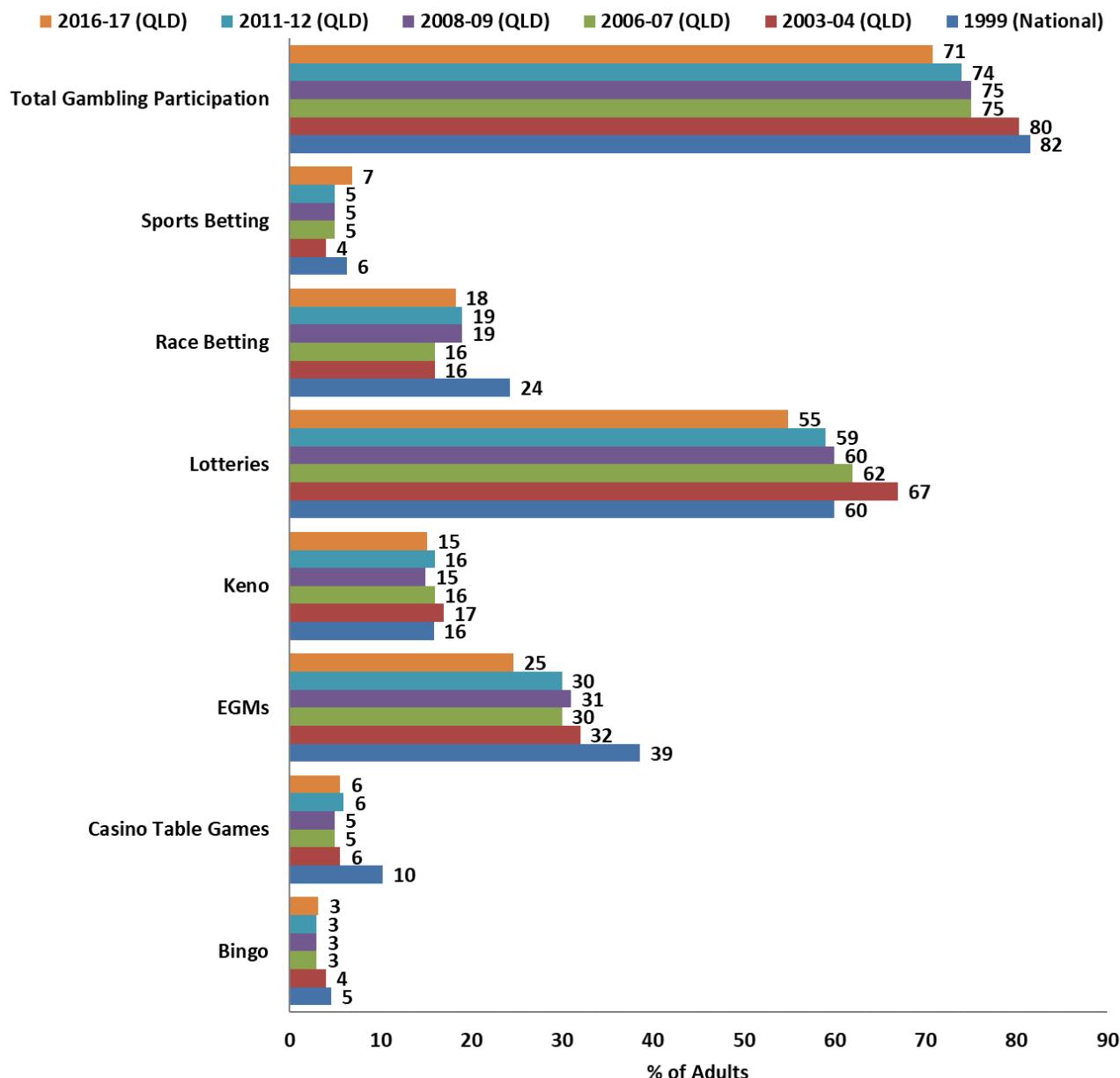
²² Stevens, M; Flack, M. and Gupta, H. (2019) *Northern Territory Gambling Prevalence and Wellbeing Survey Report 2018*, Menzies School of Health Research.

Queensland

Since the Productivity Commission's 1999 national survey Queensland has conducted a Household Gambling Survey for the 2001, 2003-04, 2006-07, 2008-09, 2011-12 and 2016-17 periods.

The 2016-17 Queensland Household Gambling Survey²³ indicated that overall gambling participation in this jurisdiction comprised approximately 71% of the adult population – a further decrease on results found by previous surveys.

Figure 9-5 Queensland Gambling Participation (Select Forms of Activity) 1999-2016/17 as a percentile of the QLD Population 18+



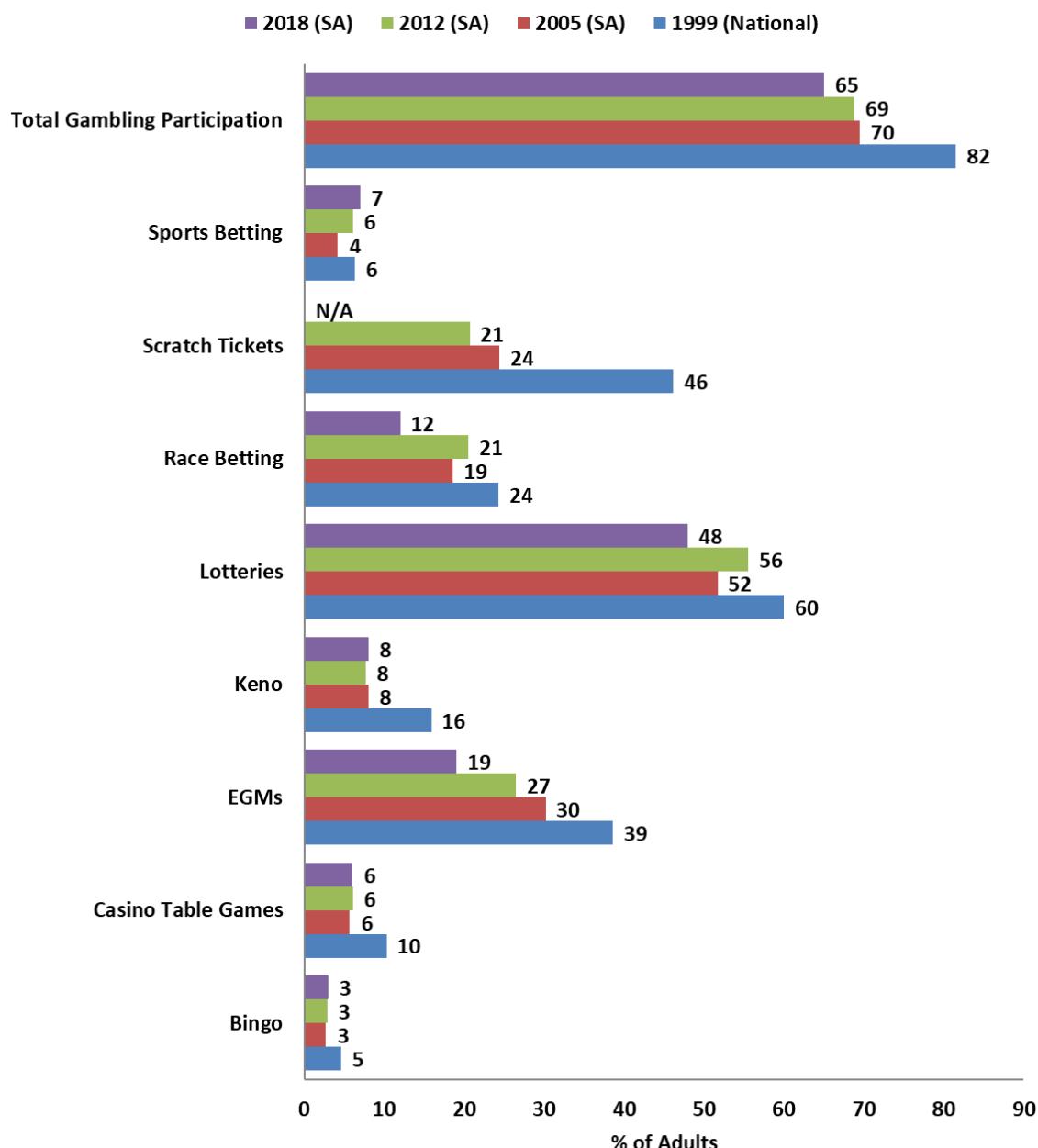
Please note that the figure for lotteries includes scratch tickets for all surveys post 1999. The participation rate for scratch tickets from the 1999 survey for Queensland was 46%.

²³ Queensland Government, Department of Justice and Attorney General (2018) *Queensland Household Gambling Survey 2016-17*. See also Queensland Government (2005) *Queensland Household Gambling Survey 2003-04*, Queensland Government (2008) *Queensland Household Gambling Survey 2006-07*, Queensland Government (2010) *Queensland Household Gambling Survey 2008-09* and Queensland Government (2012) *Queensland Household Survey 2011-12*.

South Australia

Gambling prevalence in South Australia was last reported in 2018²⁴. This study showed the overall gambling participation rate of South Australian adults had decreased from 68.8% (in 2012) to 65%. Results of a 2012 survey²⁵ similarly showed a decrease to the total participation rate found in a study conducted for the October-Dec 2005 period.²⁶

Figure 9.6 South Australian Gambling Participation (Select Forms of Activity) 1999-2018 as a percentile of the SA Population 18+



Please note that in the 2018 Survey Scratch Cards were included among lotteries.

²⁴ Woods, A., Sproston, K., Brook, K., Delfabbro, P. & O'Neil, M. ORC International (2019) *Gambling Prevalence in South Australia (2018)*, Department of Human Services, South Australia

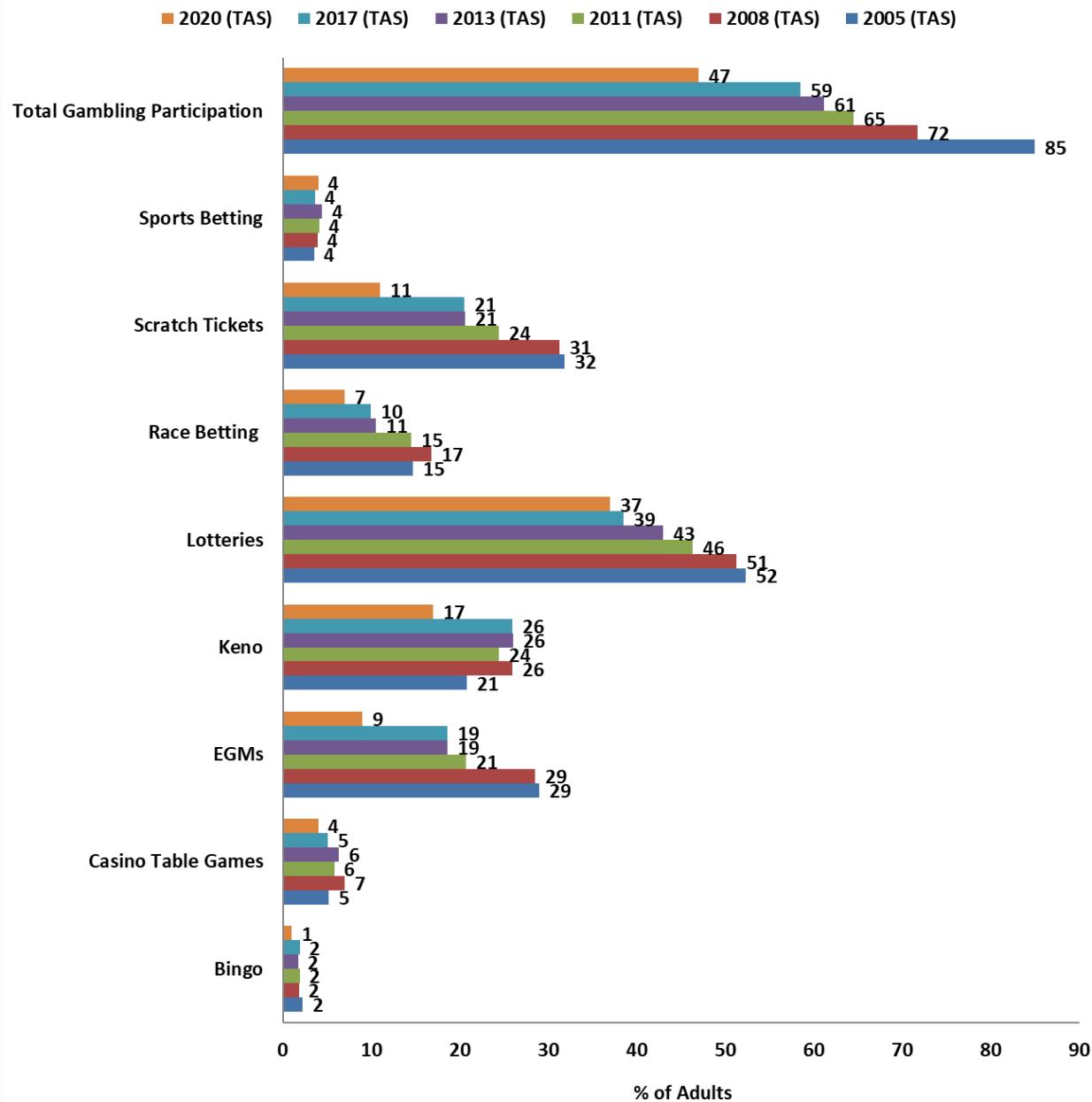
²⁵ Office of Problem Gambling, Department for Communities and Social Inclusion (2013) *Gambling Prevalence in South Australia 2012*.

²⁶ South Australian Department for Families and Communities (2006) *Gambling Prevalence in South Australia: October to December 2005*.

Tasmania

In Tasmania the prevalence of gambling (prior to the impact of COVID-19) was surveyed most recently in 2020 as a component of the 5th Tasmanian Social and Economic Impact Study.²⁷ Previous Tasmanian studies were published in 2017, 2013, 2011, 2008 and 2005. Studies show a drop in overall participation levels from 85% in 2005, to 71.7% in 2008, 64.5% in 2011, 61.2% in 2013 and 58.5% in 2017. The 2021 survey found a further decline, with a participation rate in gambling activities by Tasmanian adults of 47%.

Figure 9-7 Tasmanian Gambling Participation (Select Forms of Activity) 1999-2020 as a percentile of the TAS population 18+²⁸



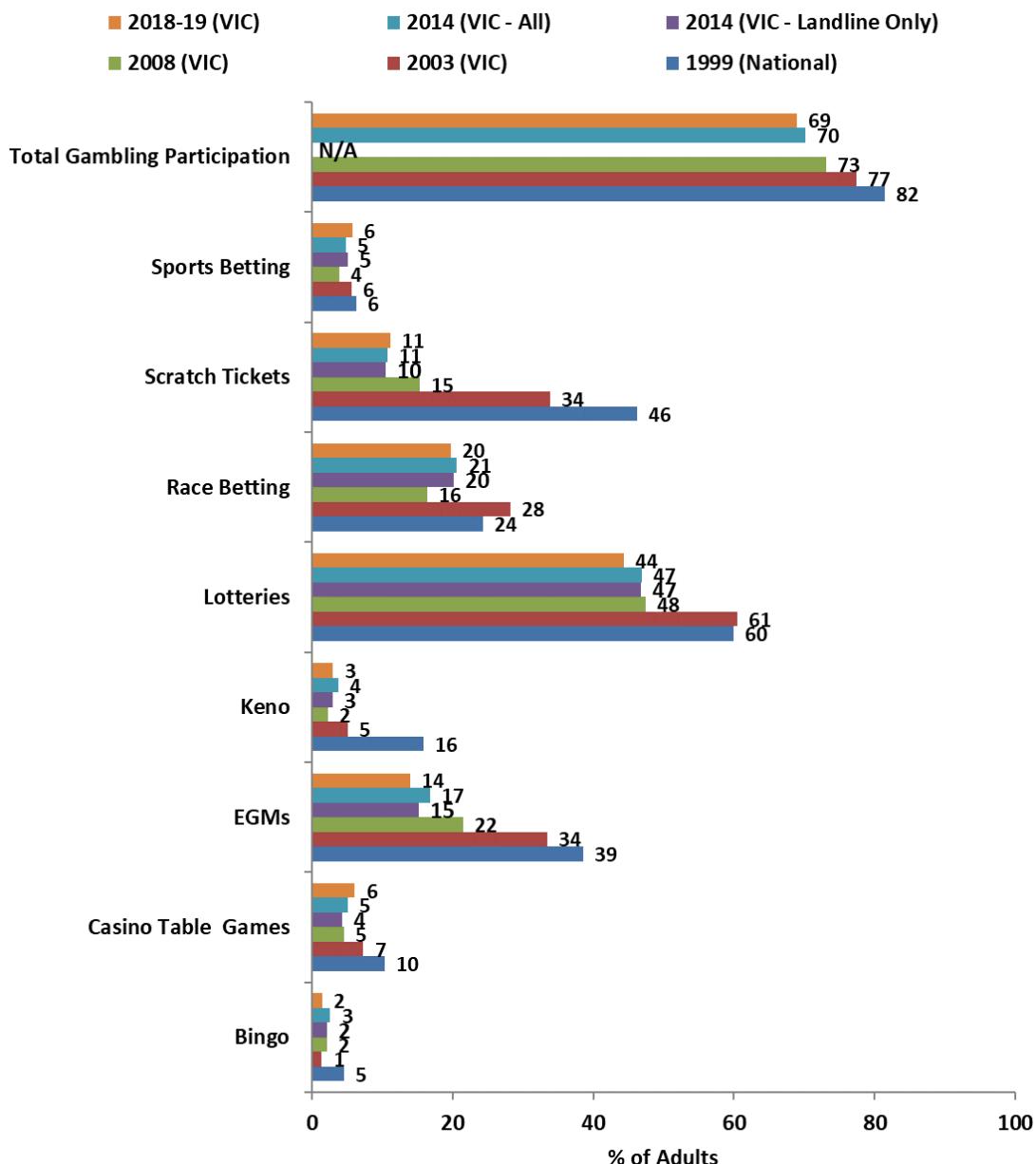
²⁷ South Australian Centre for Economic Studies, Delfabbro, P. and ENGINE Asia Pacific Pty Ltd (2021) *Fifth Social and Economic Impact Study of Gambling in Tasmania 2021, Volume 2: 2020 Prevalence Survey Report*, Tasmanian Department of Treasury and Finance. Please Note: Prevalence surveys usually inquire of respondent activity in the previous 12-month period. Given the impacts of the COVID-19 pandemic on gambling availability this survey collected information on the more ‘typical’ 12-month period prior to the pandemic. This enables the comparison of results with previous surveys of the Tasmanian population (and with other jurisdictions) The report clarifies that, while respondents are still answering in relation to a 12-month period, the beginning of that period could be up to 20 months in the past (from March 2019 to the end of fieldwork in November 2020) so for those who had not gambled regularly this may have impacted on recall.

²⁸ Please note that figures for Race Betting are separated into both on and off-course results in 2005. The Off-course figure represented here pertains to TAB/Tote participation of 14.7% of the population. The on-course figure pertaining to TAB/Tote and Bookmakers was 6.7%. Likewise, Keno participation was split in 2005 between Club and Casino Keno participation. The figure represented here is for Club Keno (20.8% of the adult population) Casino Keno participation was reported as 9.5%.

Victoria

Results of a study conducted in the 2018-19 period for the Victorian Responsible Gambling Foundation²⁹ found the overall Victorian adult participation rate in gambling activities to be 69%. This figure represents a slight decrease from that found in 2014 (70.1%).³⁰ That figure also represented a decrease in previous state participation rates (73.1% in 2008³¹ and 77.4% in 2003).³²

Figure 9-8 Victorian Gambling Participation (Select Forms of Activity) 1999-2019 as a percentile of the VIC Population 18+



Please note: The 2014 Victorian study used a dual frame sample (mobile phone only and landline phone only). Results cited here show both data sets - landline only results and full survey results. Figures for participation from landline only respondents are generally lower than those represented for the full sample but are more comparable with previous landline only survey results.

²⁹ Rockloff, M., Browne, M., Hing, N., Thorne, H., Russell, A., Greer, N., Tran, K., Brook, K. & Sproston, K. (2020) *Victorian population gambling and health study 2018–2019*, Victorian Responsible Gambling Foundation.

³⁰ Hare, S (2015) *Study of Gambling and Health in Victoria*, Victorian Responsible Gambling Foundation and Victorian Department of Justice and Regulation.

³¹ Schottler Consulting Pty Ltd (2009) *A Study of Gambling in Victoria: Problem Gambling from a Public Health Perspective*, Victorian Dept of Justice.

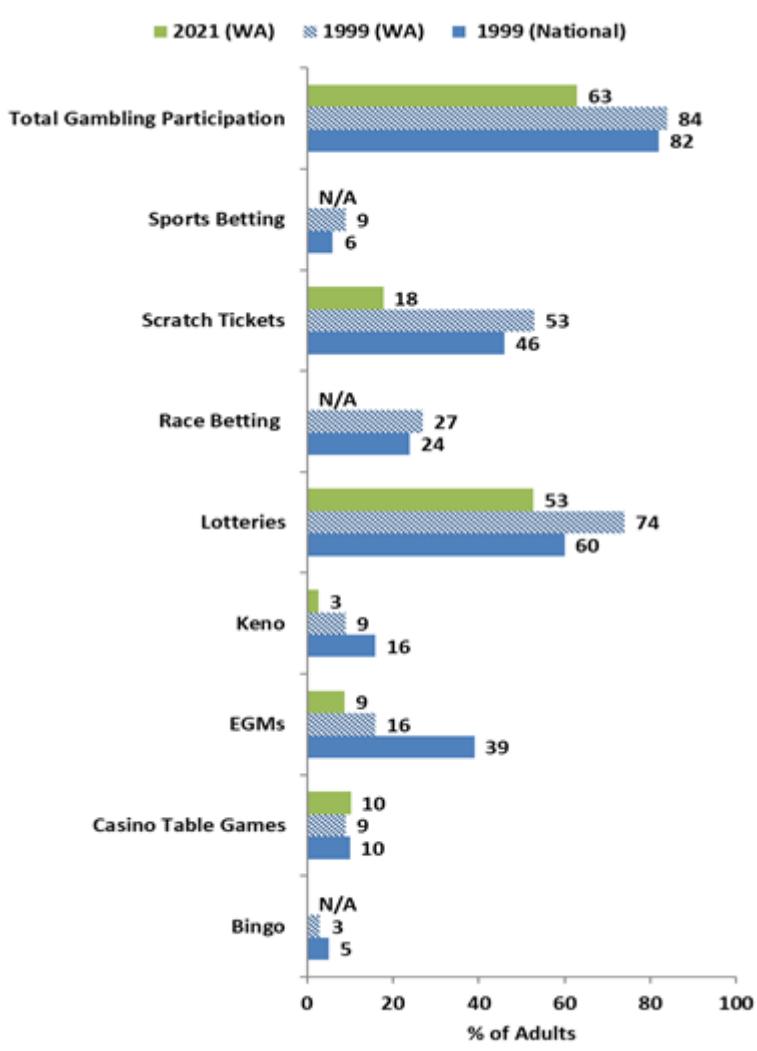
³² Australian National University, Centre for Gambling Research (2004), *2003 Victorian Longitudinal Community Attitudes Survey*, Gambling Research Panel Report No 6.

Western Australia

For many years the only available gambling participation figures for Western Australia remained those provided in the Productivity Commission's 1999 report. In 1999, owing to the configuration of the Western Australian gambling environment, participation rates across a number of gambling forms differed from those found nationally. EGM gambling was, and remains, permitted only in the Perth casino, and thus had an estimated participation rate of 16% - far lower than the 1999 national average. However Western Australia was found to have higher participation rates than the 1999 national average for some gambling forms – such as lotteries, scratch tickets and betting on sports and races.

In October 2021 the Experimental Gambling Laboratory at CQ University provided an expert opinion paper for the Perth Casino Royal Commission. Drawing on data from GRA's 2021 Interactive Gambling Study the authors noted that there is a higher proportion of people who gamble in WA (62.9%) when compared with the rest of Australia (56.3%). Western Australians were found to be significantly more likely to take part in lotteries (52.8% vs 40.3%), scratch tickets (17.8% vs 15.5%) and casino games (10.2% vs 5.6%) as well as fantasy sports betting (1.0% vs 0.5%). However Western Australians were significantly less likely to take part in gambling on Electronic Gaming Machines (8.7% vs 17.3% and Keno (2.6% vs 8.3%).³³

Figure 9-9 Western Australian (WA) Gambling Participation and National Average Participation Figures (select Forms of Activity) 1999 - 2021³⁴as a percentile of the Adult Population



³³ Rockloff, M., Hing, N., Browne, M., Russell, A., Thorne, H., Newall, P and Vishtin, T. (2021) *Gambling Harm and Harm Minimisation in Western Australia*, Expert opinion prepared for the Perth Casino Royal Commission.

³⁴ The 1999 figure reported by the PC for internet gambling in the ACT was <0.5 and refers to playing casino type games via the internet.

INTERACTIVE GAMBLING PARTICIPATION IN AUSTRALIA

What is Interactive Gambling?

"Interactive gambling refers to the range of gambling activities that occur through media connected to the internet. The term interactive gambling is often used interchangeably with the term 'Internet', 'remote' or 'online' gambling. Interactive gambling is a joint term capturing gaming and wagering on the Internet. Interactive gaming includes playing games where outcomes are determined by random number generators, for example blackjack, poker, lotteries and electronic gaming machines (EGMs); and interactive wagering on sports field or racetrack events, where the Internet represents a medium through which wagers are placed".

"The *Interactive Gambling Act 2002* (Cth) ("IGA") regulates interactive gambling in Australia. The IGA prohibits gambling operators from offering interactive gambling services to Australian residents with the exception of wagering and lotteries."

Source: Hing, N., Gainsbury, S., Blaszczynski, A., Wood, R., Lubman, L. and Russell, A. (2014) *Interactive Gambling*, Gambling Research Australia

National Participation in Interactive Gambling

Productivity Commission (PC) 1999- 2010

The Productivity Commission's (PC's) 1999 report into gambling (much as some subsequent state/territory reports) surveyed respondents for *internet* gambling participation – where internet gambling participation was defined strictly as gambling on casino style games via the internet (e.g.: casino table games/poker/EGMs).

The PC's recorded figures for state/territory Internet gambling participation rates in 1998-99 were low (<0.5% of the population for most states/territories) with approximately 90,000 Australians estimated to be gambling on the Internet nationally (or 0.6%).³⁵

In 2010 the PC estimated that approximately 0.1-0.43% of the adult population had participated in internet gambling over the previous 12-month period.

Gambling Research Australia (GRA) 2010-11

An in-depth exploration of *interactive* gambling occurred in Australia in 2010-11 when a landmark Gambling Research Australia (GRA) study undertook a detailed investigation and subsequent report (published in 2014).³⁶

This study (defining interactive gamblers as those who had gambled at least once in the previous twelve-month period using interactive media) found interactive gambling prevalence (participation) in Australian adults to be 8.06% for the 2010 -11 period.

Non-interactive gamblers – defined as those who had gambled using land-based venues or via the telephone only in the previous twelve-month period - accounted for 56.16% of the Australian adult population.³⁷

The GRA study found that interactive gamblers reported engaging in a significantly higher number of gambling activities when compared to non-interactive gamblers. On average, interactive gamblers engaged in 3.62 different forms of gambling, compared to 2.31 for non-interactive gamblers.³⁸

³⁵ Productivity Commission (2010) *Gambling, Report no. 50*, Canberra.

³⁶ Hing, N., Gainsbury, S., Blaszczynski, A., Wood, R., Lubman, L. and Russell, A. (2014) *Interactive Gambling*, Gambling Research Australia.

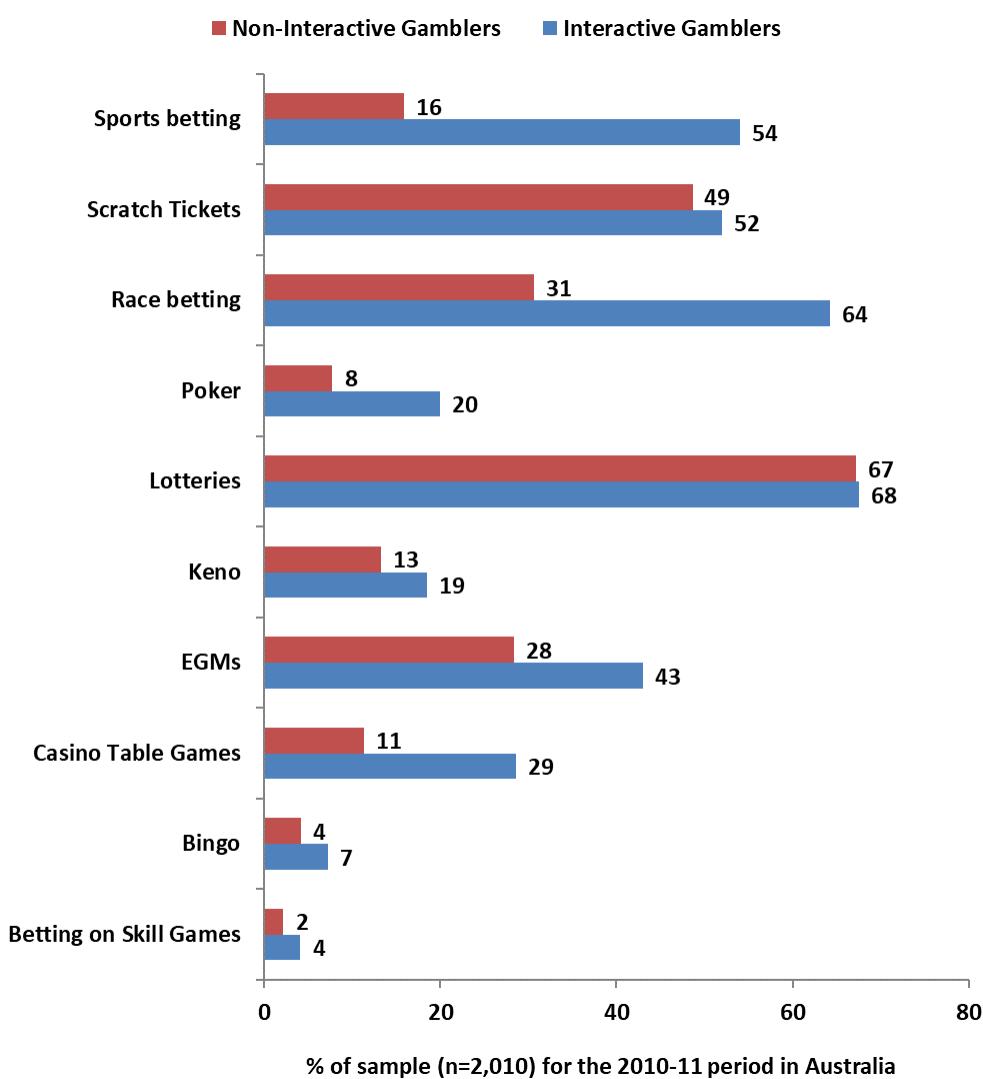
³⁷ Ibid p 84

Interactive gamblers (54.91% of n=849) reported first accessing the internet to gamble in, or later than, 2008-09. Most then preferred to access online gambling via computer or lap-top (87.08%) with a further 9.42% preferring to use their mobile or smartphone and 2.54% preferring to use a portable device or tablet.³⁹

A majority of interactive gamblers surveyed (65.1%, n=572) cited the convenience of online access as among the key factors influencing their decision to start gambling via an interactive medium.⁴⁰

Gambling Participation amongst Australian Interactive and Non-Interactive Gamblers 2010-11

Figure 9-10 Past year prevalence of different forms of gambling for interactive and non-interactive gamblers in Australia 2010-11 (n=2,010)⁴¹



Interactive gambling, including mobile gambling, is now recognised as one of the fastest growing modes of gambling, with sports and race wagering the dominant forms of interactive gambling in Australia.⁴²

³⁸ Ibid p88

³⁹ Ibid p91

⁴⁰ Hing, N., Gainsbury, S., Blaszczynski, A., Wood, R., Lubman, L. and Russell, A. (2014) *Interactive Gambling*, Gambling Research Australia p 91.

⁴¹ Ibid p88 percentiles taken from Table 4.6

⁴² See for example Gainsbury, S. (2014) *Interactive Gambling in Australia*, AGRC Discussion Paper No. 3 <<https://aifs.gov.au/agrc/sites/default/files/publication-documents/agrc-dp3-interactive-gambling.pdf>>

While 8% of Australians were found to participate in interactive gambling in 2010, a later study, conducted by Roy Morgan Australia, suggested that the rate of interactive gambling was as much as 21% of the population in 2013.⁴³

Roy Morgan Australia reported in 2018 that, overall, some 3.4 million Australians placed a bet (whether on a sporting event, horse racing, harness racing, greyhound racing or some other event) in the 12 months to March 2018 and that growth is being driven by mobile phone use with, according to their research, over a fifth of Australian bettors, (or 22.7%) using their mobile phone compared to only 5.6% in 2012.⁴⁴

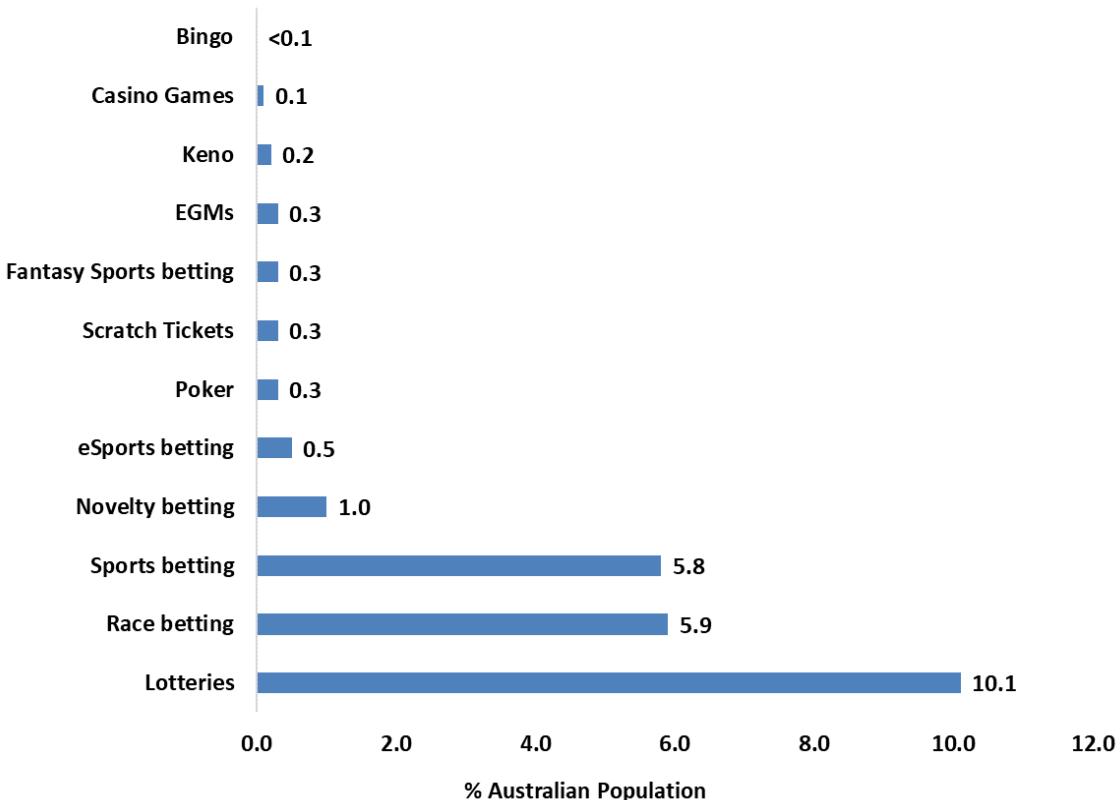
Gambling Research Australia (GRA) 2019

A second national GRA study of interactive gambling in Australia was undertaken in the 2019-20 period⁴⁵. Thirteen gambling activities were examined, including new activities emerging since 2014.

This study found that the proportion of Australian adults who gambled online had increased – from 8.1% in the 2010-11 period to 17.5% in 2019.

Amongst gamblers, 30.7% gambled online in 2019 compared to 12.6% in 2010-11. Lotteries were the most prevalent online form, followed by race betting, sports betting and novelty betting. Participation in all other forms was less than 1%.

Figure 9-11 Estimated prevalence of online gambling in the Australian population by form (2019)



Interactive gamblers were found by this study to be significantly more likely to be male and younger than non-interactive gamblers. Interactive gamblers in 2019 were also significantly more likely to be better

⁴³ Roy Morgan (2014), Internet betting on the rise, Roy Morgan Gambling Currency Report, article no. 5468 cited in Review of Illegal Offshore Wagering, Report to the Ministers for Social Services and the Minister for Communication and the Arts by Lead Reviewer, the Hon. Barry O'Farrell (2015). Commonwealth of Australia (Department of Social Services) 2015.

⁴⁴ Roy Morgan (2018), Mobile Betting drives growth in online wagering, Roy Morgan Finding No. 7624 <

⁴⁵ Hing, N., Russell, A., Browne, M., Rockloff, M., Greer, N., Rawat, V., Stevens, M., Dowling, N., Merkouris, S., King, D., Breen, H., Salonen, A. & Woo, L. (2021) The second national study of gambling in Australia (2019-20), Gambling Research Australia <<https://www.gamblingresearch.org.au/publications/second-national-study-interactive-gambling-australia-2019-20>>

educated, specifically in terms of completing a postgraduate degree, an undergraduate degree, or year 12 and employed on a full-time basis.

In 2019, interactive gamblers took part in 2.82 gambling forms on average which was significantly higher than the average number of gambling forms for non-interactive gamblers.

Reflecting the rise of mobile gambling, interactive gamblers reported spending a little over half of their total gambling expenditure using smartphones. Smartphones were reported as the most used device to bet on sports, novelty events, fantasy sports and esports. Computers and tablets were also widely used to bet on skin gambling, fantasy sports and esports.

Illegal Offshore Gambling

Less is known about current Australian rates of participation in prohibited interactive gambling forms (i.e., those prohibited by the *Interactive Gambling Act 2001* - such as online casino style games or EGMs).

In 2017, the Interactive Gambling Act 2001 (IGA) was amended to combat illegal offshore gambling through stronger enforcement and disruption measures.

The amendments gave the Australian Communications and Media Authority (ACMA):

- expanded responsibilities and new powers to enforce prohibitions on providing or advertising illegal interactive gambling services;
- new deterrent and disruption tools; and
- a role in raising awareness of Australian gambling laws to help minimise the supply and use of illegal interactive gambling services⁴⁶

The ACMA reported in 2021 that over 130 illegal services have pulled out of the Australian market since the enforcement of new illegal offshore gambling rules commenced in 2017 and, since the ACMA made its first blocking request in November 2019, 272 illegal gambling websites have been blocked.⁴⁷

The 2019 GRA study on national interactive gambling reported that while Australians use mainly Australian-licensed operators to bet on sports, races, lotteries, novelty events, esports and fantasy sports, use of illegal offshore sites for other gambling forms does occur.

In total, 47.1% of interactive gamblers in the sample surveyed for the GRA report stated to using an illegal offshore gambling site in the past year. More than one-quarter of those interactive gamblers sampled used an illegal site to purchase instant scratch tickets (26.3%), approximately one-in-six to gamble on EGMs (15.8%), casino games (15.7%) and poker (15.0%), 13.9 per cent to play bingo, and 9.0 per cent to engage in skin gambling.⁴⁸

Awareness of the illegality of offshore sites was low in the sample. Between one-third and one-half of interactive gamblers thought that online provision of instant scratch tickets, casino games, poker, EGMs and bingo was legal. Only three-in-ten interactive gamblers reported usually checking whether an online gambling operator is licensed in Australia before using it, while nearly one-half never checked.⁴⁹

⁴⁶ Australian Communications and Media Authority (2018) *Disrupting illegal offshore gambling 12-month report into the ACMA's actions under the Interactive Gambling Act 2001*, Australian Government <https://www.acma.gov.au/sites/default/files/2020-01/IGA%2012-month%20report_FINAL%20pdf.pdf>

⁴⁷ <<https://www.acma.gov.au/articles/2021-06/acma-requests-internet-service-providers-block-more-illegal-gambling-websites>>

⁴⁸ Hing, N., Russell, A., Browne, M., Rockloff, M., Greer, N., Rawat, V., Stevens, M., Dowling, N., Merkouris, S., King, D., Breen, H., Salonen, A. & Woo, L. (2021) The second national study of gambling in Australia (2019-20), Gambling Research Australia <<https://www.gamblingresearch.org.au/publications/second-national-study-interactive-gambling-australia-2019-20>> p12

⁴⁹ Ibid p 12

INTERACTIVE GAMBLING PARTICIPATION IN AUSTRALIA BY STATE/TERRITORY

Some states and territories in Australia have, as a component of routine gambling prevalence surveying, investigated interactive gambling amongst their populations.

While the data available is not homogenous (in either the time periods surveyed or the survey format available) it does show interesting changes.

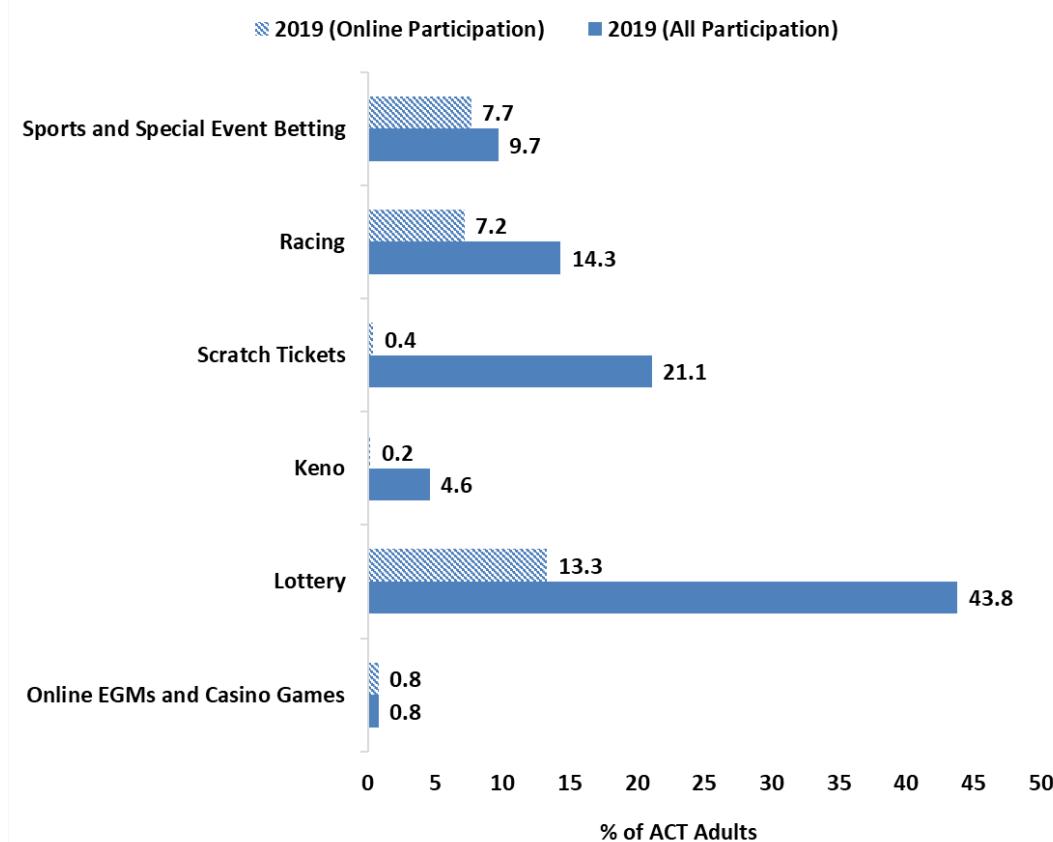
Lottery tickets, for instance, traditionally purchased in land-based outlets have a growing presence online and wagering online, particularly sports betting, has shown significant growth in participation over recent years.

Australian Capital Territory

The 2019 ACT Gambling Survey⁵⁰ found that 20.9% of ACT adults (68,000 people) were estimated to have gambled online in the Territory in the previous 12-month period. This figure accounts for approximately one third of ACT gamblers (34.5%).

9.7% of those surveyed had gambled online only. Analysis by the study authors found that removing people who only bought lottery tickets halved the number of online only gamblers to 5.1%.

Figure 9-12 Australian Capital Territory Online Gambling Participation (Select Forms of Activity) 2019 as a percentile of the ACT Population 18+



⁵⁰ Paterson, M., Leslie, P. and Taylor, M. (2019) The 2019 ACT Gambling Survey, ANU Centre for Gambling Studies, ACT Gambling and Racing Commission.

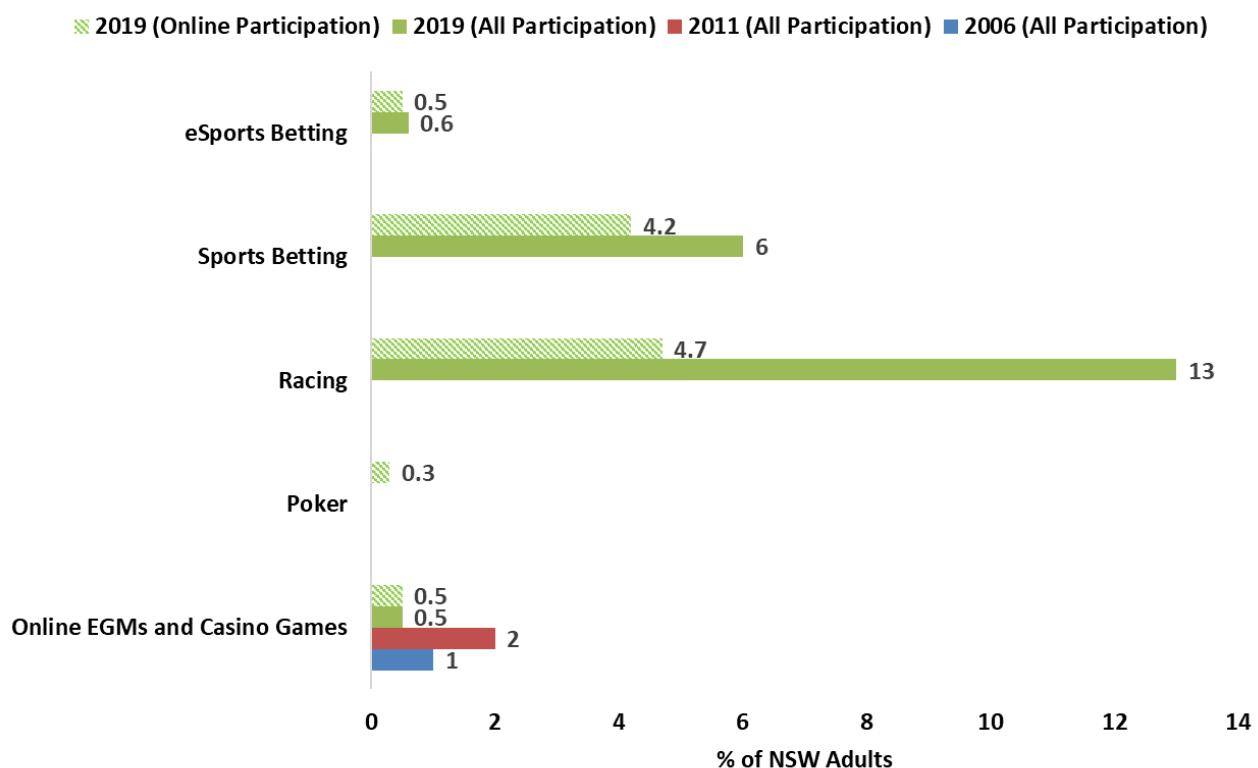
New South Wales

The 2019 NSW Gambling Survey⁵¹ explored online gambling in some depth and found that 8% of NSW adults had gambled online in the previous 12-month period (a figure that represents 15% of all NSW gamblers).

The survey notes that comparisons over time in online gambling can only be made for playing casino games or EGMs on the internet (the offer of which is prohibited to Australians).

While sample sizes are small, and should thus be treated with caution, the proportion of NSW adults playing casino games on the internet in 2006 was 1%, increasing to 2% in 2011 and dropping to 0.5% in 2019.⁵²

Figure 9-13 New South Wales Online Gambling Participation (Select Forms of Activity) 2019 as a percentile of the NSW Population 18+



⁵¹ Browne, M., Rockloff, M., Hing, N., Russell, A., Boyle, Cailem Murray, Rawat, Vijay, Tran, Katherine, Brook, Kate and Sproston, Kerry (2019) *NSW Gambling Survey 2019*, NSW Responsible Gambling Fund.

⁵² Ibid

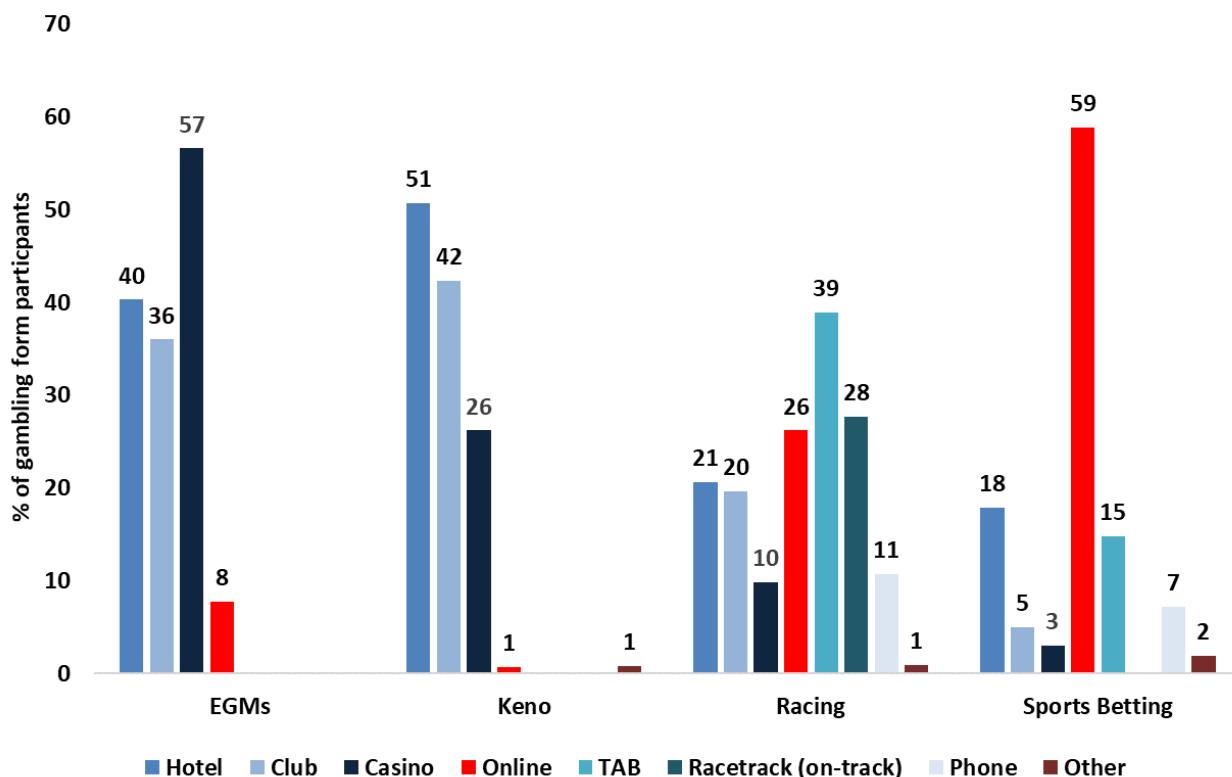
Northern Territory

The 2018 Northern Territory Gambling Prevalence and Wellbeing Survey⁵³ reported on the *modes* by which gambling was undertaken for select activities in the Territory over the previous 12-month period.

Mode of gambling was only recorded in the survey for those who gambled on particular gambling forms.

It should also be noted that some participants used multiple modes to participate in a gambling form.

Figure 9-14 Northern Territory Mode of Gambling Activity (Select Forms of Activity) 2018 as a percentile of NT Gambling form participants



⁵³ Stevens, M; Flack, M. and Gupta, H. (2019) *Northern Territory Gambling Prevalence and Wellbeing Survey Report 2018*, Menzies School of Health Research.

Queensland

The 2016-17 Queensland Household Gambling Survey⁵⁴ asked participants about the mode used to gamble on various activities.

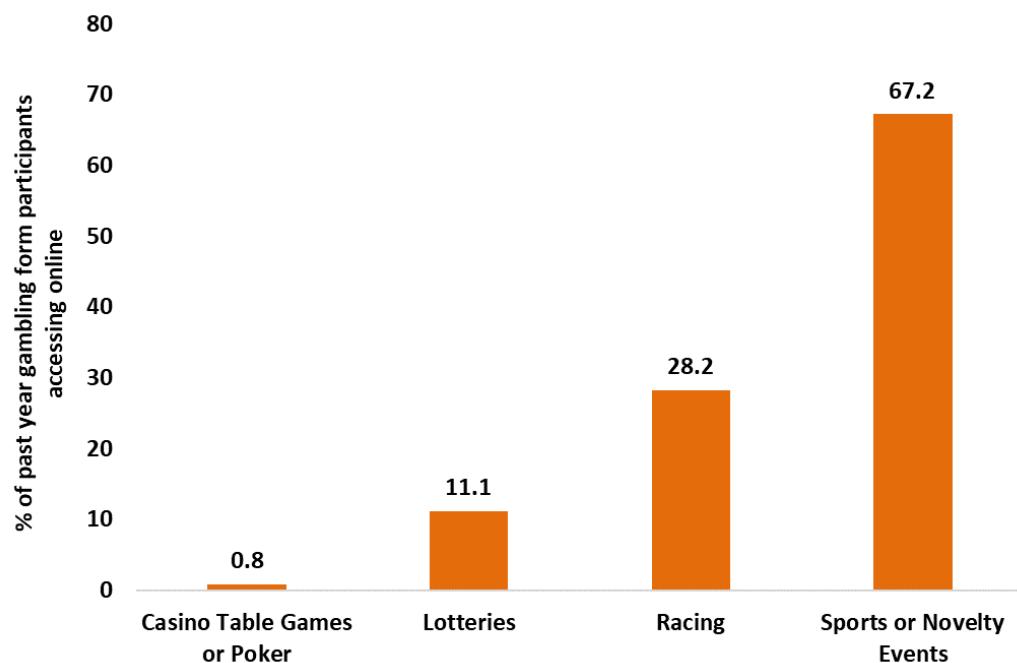
In this study, an internet gambler was defined as a person who has used the internet to gamble on one or more of the following activities: online casino games or poker; lotteries; horse, harness or greyhound races; or sporting or novelty events.

Overall, about 12.3% of the adult Queensland population had gambled using the internet – with those of younger age and male gender being those more likely to do so.

Please note that the percentiles in the graph below represent the proportion of Queenslanders participating in each of the gambling activities listed who had gambled on that activity online (as opposed to representing a percentile of the state population).

For example, overall, among those who had bet on horse, harness or greyhound races in the last 12 months, the most popular places for placing bets were a club or hotel (37.7 per cent), a stand-alone TAB (31.0 per cent) and the internet, using a website or mobile app (28.2 per cent).

Figure 9-15 Queensland Online Gambling Participation (Select Forms of Activity) 2016-17 as a proportion (%) of gambling form participants



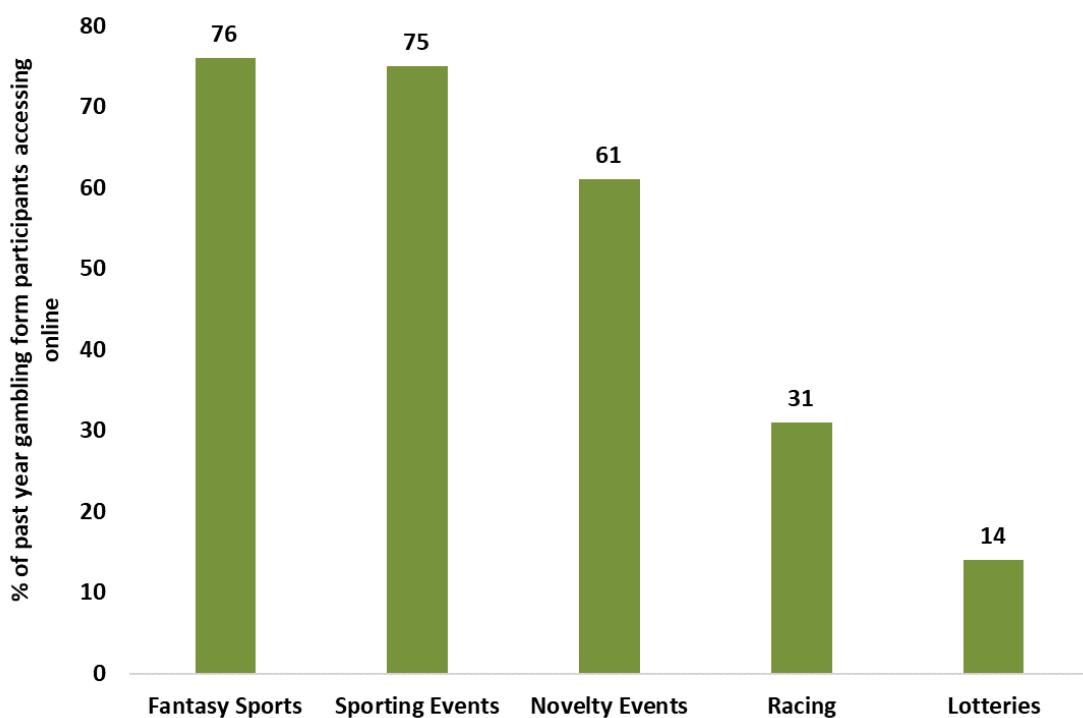
South Australia

In South Australia a 2018 survey⁵⁵ found that 13% of the SA population had bet through the internet (20% of past year gamblers). This was a significant increase from the 5% of the population reported in 2012 (8% of past year gamblers) and 1% of the population reported in 2005.

As in Queensland, the graph below shows the *proportion* of participants in each of the gambling activities listed who had gambled on that activity online.

Fantasy sports and general sports betting had the highest association with online gambling, with about three-quarters of South Australian participants in each of these forms having gambled online.

Figure 9-16 South Australian Online Gambling Participation (Select Forms of Activity) 2018 as a proportion (%) of gambling form participants



⁵⁵ Woods, A., Sproston, K., Delfabbro, P. and O'Neill, M. (2018) *Gambling Prevalence in South Australia (2018)*, Department of Human Services, South Australia

Tasmania

The Fifth Tasmanian Social and Economic Impact Study (relating to the period 2019-20) defined internet gamblers as those who had spent money doing one or more of the following online gambling activities:

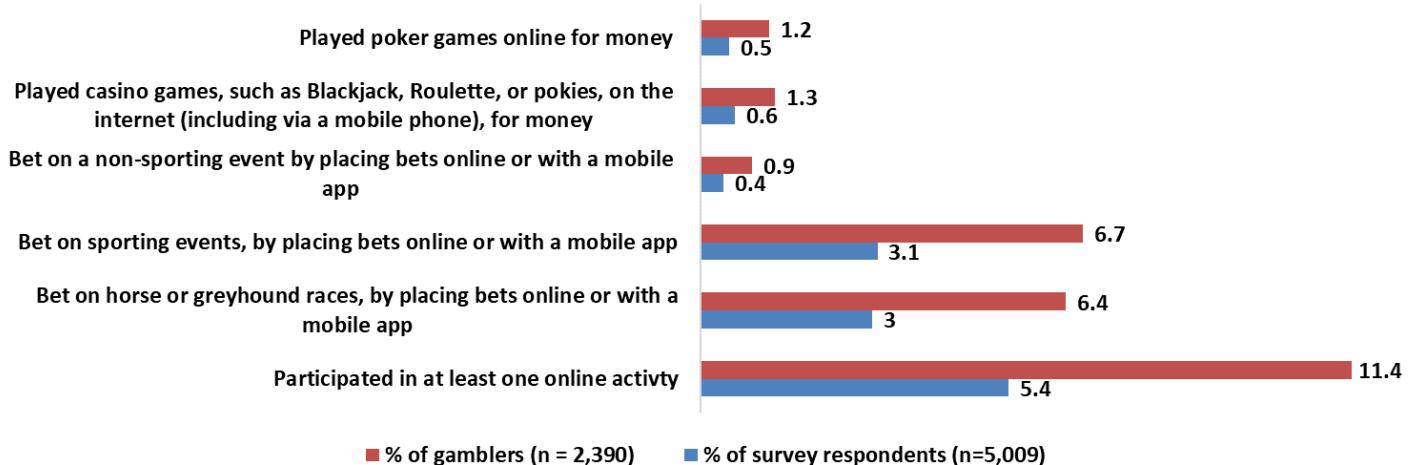
- Played casino games, such as Blackjack, Roulette, or EGMs, on the internet (including via a mobile phone), for money;
- Played poker games online for money;
- Betting on horse or greyhound races, by placing bets on the internet from a computer or with a mobile app;
- Betting on sporting events, by placing bets on the internet from a computer or with a mobile app; and/or
- Betting on non-sporting events, by placing bets on the internet from a computer or with a mobile app.

This study found that over one in ten Tasmanian gamblers (11%) had participated in internet gambling in the 12 months before COVID-19. This represented one in twenty survey respondents (5%) overall.⁵⁶

Amongst gamblers overall, excluding those who solely purchased lottery tickets (or participated in other non pre-defined activities) only 4% of gamblers were found to use the internet only. A further 14% of gamblers used both the internet and land-based gambling forms while 82% were land-based gamblers only.

Betting on sporting events, and race betting, were the most common internet gambling activities. Seven per cent of gamblers (3% of respondents overall) had participated in online sports betting. Six per cent of gamblers (3% of respondents overall) had placed racing bets via the internet.

Figure 9-17 Tasmanian Participation rates for internet gambling, overall and by activity (2019-20)



⁵⁶ South Australian Centre for Economic Studies, Delfabbro, P. and ENGINE Asia Pacific Pty Ltd (2021) *Fifth Social and Economic Impact Study of Gambling in Tasmania 2021, Volume 2: 2020 Prevalence Survey Report*, Tasmanian Department of Treasury and Finance

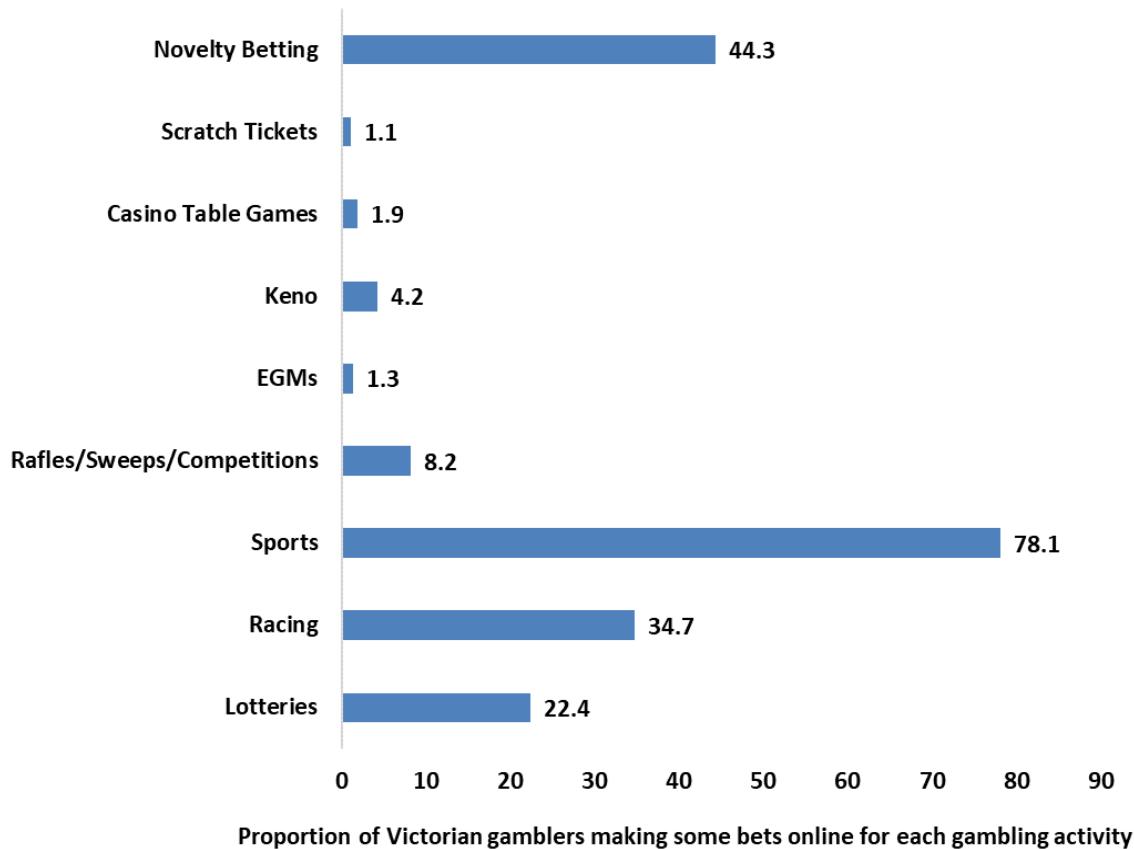
Victoria

The most recent Victorian survey gauging gambling prevalence was conducted in 2018-19 and found that, overall, 27.6% of Victoria's gamblers had used online modes (for at least some of their gambling activity).

Sports bettors had the highest level of online gambling activity, with 78.1% of sports bettors using the internet to place bets via online bookmakers or mobile apps.

Over a third (34.7%) of race bettors had placed racing bets over the internet via online bookmakers or mobile apps.⁵⁷

Figure 9-18 Proportion (%) of Victorian gamblers using online gambling modes by gambling activity 2018-19

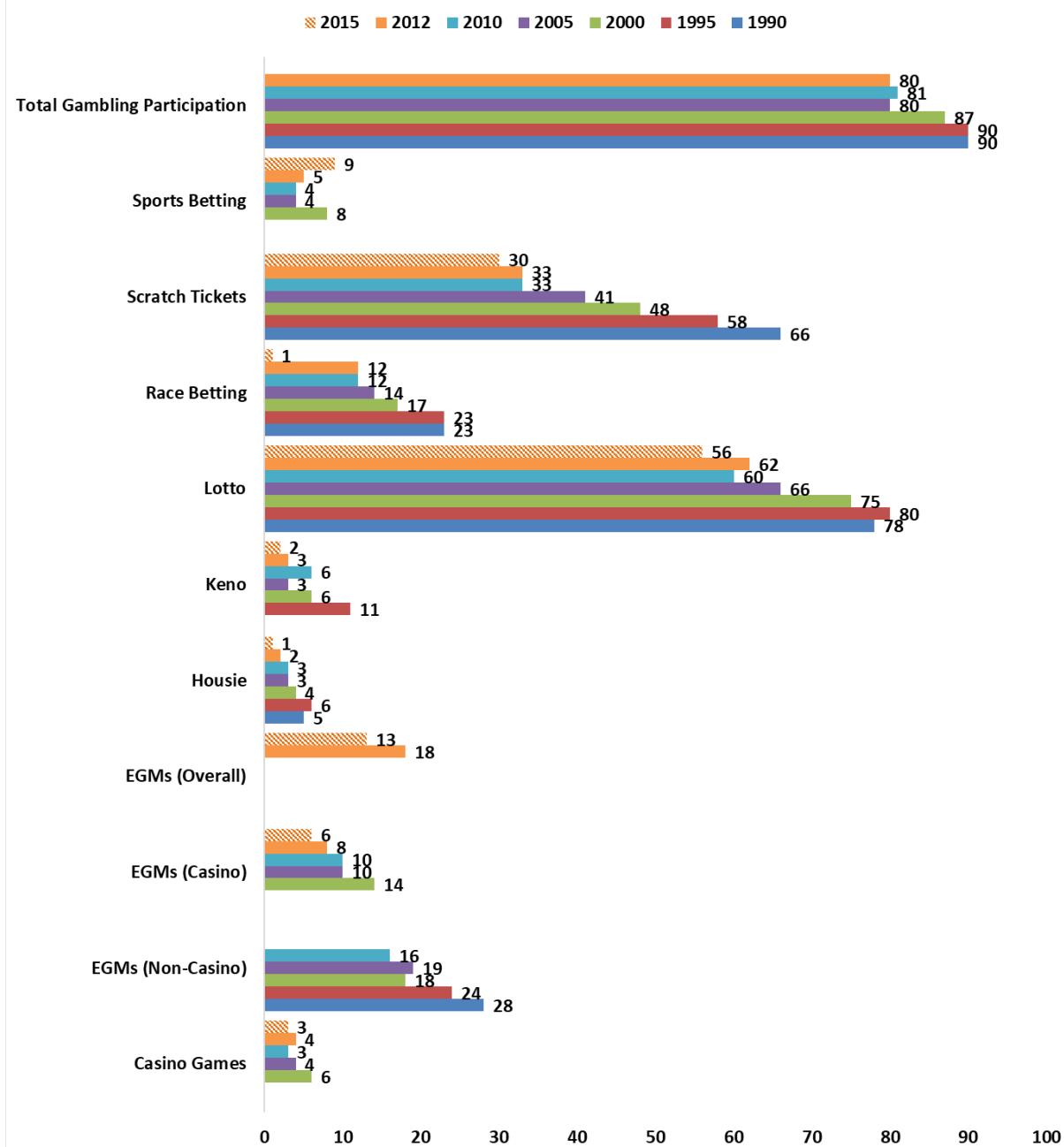


⁵⁷ Rockloff, M., Browne, M., Hing, N., Thorne, H., Russell, A., Greer, N., Tran, K., Brook, K. & Sproston, K. (2020) *Victorian population gambling and health study 2018–2019*, Victorian Responsible Gambling Foundation, Melbourne.

GAMBLING PARTICIPATION (LAND-BASED) IN NEW ZEALAND (NZ)

New Zealand conducted past-year Gambling Participation Surveys at five yearly intervals from 1985 - 2005.⁵⁸ Following this series, the most recent survey information pertains to 2012.⁵⁹ The 2012 survey comprised the baseline or Wave One data for a longitudinal study (with an initial sample of 6,251 participants). Subsequent follow up studies have been completed in three further waves (2013, 2014 and 2015). Waves 2-4 of the study surveyed increasingly smaller numbers of Wave 1 participants. The data from Wave 4 (2015)⁶⁰ is included below.

Figure 9-11 New Zealand (Land-Based) Gambling Participation 1990-2012/15⁶¹



⁵⁸ New Zealand Department of Internal Affairs, Te Tari Taiwhenua (2005) People's Participation in, and Attitudes to, Gambling, 1985-2005; Results of the 2005 Survey.

⁵⁹ Abbott, M., Bellringer, M., Garrett, N. & Mundy-McPherson, S. (2014) *New Zealand National Gambling Study: Overview and Gambling Participation, Report 1*, New Zealand Ministry of Health.

⁶⁰ Abbott, M., Bellringer, M. & Garrett, N. (2018) New Zealand National Gambling Study: Wave 4 (2015) Report 6, New Zealand Ministry of Health. Please note that the sample size for this study was 2,770 participants of the 6,251 participants from the Baseline (Wave 1) survey first conducted in 2012.

⁶¹ Please note: New Zealand differentiates between gaming machines played at a casino and gaming machines available at clubs and hotels. Housie is a variant of bingo and the statistics shown here relate to the playing of housie for money.