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# A GUIDE TO AUSTRALASIA'S GAMBLING INDUSTRIES

Facts, Figures and Statistics

## CHAPTER FOUR

New Zealand's Gambling Expenditure

2019/20

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# A Guide to Australasia's Gambling Industries

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



GPO Box 99,  
Melbourne 3001  
Victoria Australia  
+61 3 9670 4175

[info@austgamingcouncil.org.au](mailto:info@austgamingcouncil.org.au)  
[www.austgamingcouncil.org.au](http://www.austgamingcouncil.org.au)

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## Chapter 4

# New Zealand's Gambling Expenditure

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### Version Control

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| Version | Date         | Explanation  |
|---------|--------------|--|
| 2016-17 | June 2019    | 2016-17 Edition updated with new statistics from NZ DIA. |
| 2017-18 | January 2020 | 2017-18 Edition updated with new statistics from NZ DIA. |
| 2018-19 | May 2021     | 2018-19 Edition updated with new statistics from NZ DIA. |
| 2019-20 | October 2022 | 2019-20 Edition updated with new statistics from NZ DIA. |

## OVERVIEW

### Aggregate and per capita expenditure - summary

**Table 4-1 Summary: Inflation adjusted aggregate and per capita gambling expenditure in New Zealand (2019-20)<sup>1</sup>**

|            |              | <b>Wagering</b> | <b>Lotteries</b> | <b>Gaming Machines<sup>2</sup></b> | <b>Casino</b> | <b>Total</b> |
|------------|--------------|-----------------|------------------|------------------------------------|---------------|--------------|
| Aggregate  | \$NZ million | 284             | 569              | 723                                | 454           | 2,030        |
| Per capita | \$NZ         | 72              | 144              | 184                                | 115           | 516          |

Source: New Zealand Department of Internal Affairs (2022) Gambling expenditure statistics report: Gambling operators' key financial statistics (inflation adjusted)

**Table 4-2 Summary: Inflation adjusted aggregate and per capita gambling expenditure in New Zealand (2020-21)<sup>3</sup>**

|            |              | <b>Wagering</b> | <b>Lotteries</b> | <b>Gaming Machines<sup>4</sup></b> | <b>Casino</b> | <b>Total</b> |
|------------|--------------|-----------------|------------------|------------------------------------|---------------|--------------|
| Aggregate  | \$NZ million | 336             | 606              | 861                                | 487           | 2,289        |
| Per capita | \$NZ         | 85              | 153              | 217                                | 123           | 578          |

Source: New Zealand Department of Internal Affairs (2022) Gambling expenditure statistics report: Gambling operators' key financial statistics (inflation adjusted)

Gambling expenditure in New Zealand in 2019-20 amounted to \$2.030 billion dollars on the four main forms of gambling.

Expenditure on gaming machines outside of casinos totalled nearly \$NZ 723 million and accounted for 35.6% of all gambling expenditure. Wagering accounted for 14% of gambling expenditure (\$NZ 284 million), while expenditure on lotteries (\$NZ 569 million) accounted for 28% of spending. With expenditure of \$NZ 454 million, casinos accounted for 22.4% of all gambling spending in New Zealand.

In 2019-20 average gambling expenditure in New Zealand per adult was approximately \$NZ 516 - comprising wagering (\$NZ 72 per adult), lotteries (\$NZ 144), gaming machines (\$NZ 184) and casinos (\$NZ 115).

<sup>1</sup> Totals may not equal the sum of individual values due to rounding.

<sup>2</sup> Excludes gaming machines at casinos.

<sup>3</sup> Totals may not equal the sum of individual values due to rounding.

<sup>4</sup> Excludes gaming machines at casinos.

## EXPENDITURE ON GAMBLING

## Aggregate

Table 4-3 Aggregate gambling expenditure in New Zealand (2019-20) (\$ NZ million)

| Gambling Type                 | Expenditure \$NZ million |
|-------------------------------|--------------------------|
| Casinos                       | 504                      |
| Gaming machines (non-casino)  | 802                      |
| Lotteries Commission products | 631                      |
| Racing and sports betting     | 315                      |
| <b>All Gambling</b>           | <b>2,252</b>             |

Source: New Zealand Department of Internal Affairs (2022) Gambling expenditure statistics report: Gambling operators' key financial statistics. <https://www.dia.govt.nz/gambling-statistics-expenditure> (actual dollars, non-adjusted)

Table 4-4 Aggregate gambling expenditure in New Zealand (2020-21) (\$ NZ million)

| Gambling Type                 | Expenditure \$NZ million |
|-------------------------------|--------------------------|
| Casinos                       | 559                      |
| Gaming machines (non-casino)  | 987                      |
| Lotteries Commission products | 694                      |
| Racing and sports betting     | 385                      |
| <b>All Gambling</b>           | <b>2,625</b>             |

Source: New Zealand Department of Internal Affairs (2022) Gambling expenditure statistics report: Gambling operators' key financial statistics. <https://www.dia.govt.nz/gambling-statistics-expenditure> (actual dollars, non-adjusted)

## Expenditure Change

Table 4-5 Comparison of gambling spending in New Zealand (2018-19 to 2019-20)

| Gambling type                 | \$NZ million (2018-19) | \$NZ million (2019-20) | Increase/Decrease |
|-------------------------------|------------------------|------------------------|-------------------|
| Casinos                       | 616                    | 504                    | -18.2%            |
| Gaming machines (non-casino)  | 924                    | 802                    | -13.2%            |
| Lotteries Commission products | 530                    | 631                    | +19.1%            |
| Racing and sports betting     | 332                    | 315                    | -5.1%             |
| <b>Total<sup>5</sup></b>      | <b>\$2.402 billion</b> | <b>\$2.252 billion</b> | <b>-6.2%</b>      |

Source: New Zealand Department of Internal Affairs (2022) Gambling expenditure statistics report: Gambling operators' key financial statistics. <https://www.dia.govt.nz/gambling-statistics-expenditure> (actual dollars, non-adjusted)

Table 4-6 Comparison of gambling spending in New Zealand (2019-20 to 2020-21)

| Gambling type                 | \$NZ million (2019-20) | \$NZ million (2020-21) | Increase/Decrease |
|-------------------------------|------------------------|------------------------|-------------------|
| Casinos                       | 504                    | 559                    | +10.9%            |
| Gaming machines (non-casino)  | 802                    | 987                    | +23.1%            |
| Lotteries Commission products | 631                    | 694                    | +10%              |
| Racing and sports betting     | 315                    | 385                    | +22.2%            |
| <b>Total<sup>6</sup></b>      | <b>\$2.252 billion</b> | <b>\$2,625 billion</b> | <b>+16.6%</b>     |

Source: New Zealand Department of Internal Affairs (2022) Gambling expenditure statistics report: Gambling operators' key financial statistics. <https://www.dia.govt.nz/gambling-statistics-expenditure> (actual dollars, non-adjusted)

<sup>5</sup> Totals may not equal the sum of individual values due to rounding.

<sup>6</sup> Totals may not equal the sum of individual values due to rounding.

Per capita

**Table 4-7 Per capita gambling expenditure (inflation adjusted) in New Zealand (2019-20 to 2020-21) (\$NZ)**

| <b>Gambling Type</b>          | <b>Per Capita \$NZ<br/>(2019-20)</b> | <b>Per Capita \$NZ<br/>(2020-21)</b> |
|-------------------------------|--------------------------------------|--------------------------------------|
| Casinos                       | 115                                  | 123                                  |
| Gaming machines (non-casino)  | 184                                  | 217                                  |
| Lotteries Commission products | 144                                  | 153                                  |
| Racing and sports betting     | 72                                   | 85                                   |
| <b>Total</b>                  | <b>516</b>                           | <b>578</b>                           |

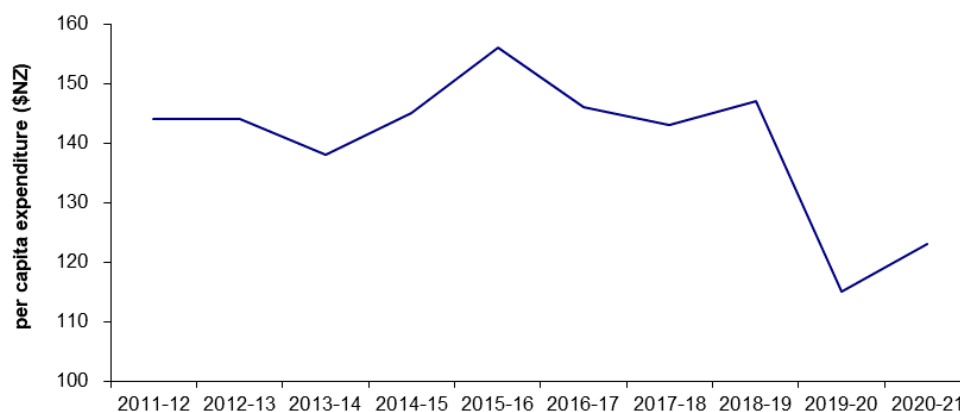
*Source: New Zealand Department of Internal Affairs (2022) Gambling expenditure statistics report: Gambling operators' key financial statistics (inflation adjusted)*

Please note, all per capita values, as provided for by the New Zealand Department of Internal Affairs, take inflation adjusted expenditure, in \$NZD, GST inclusive and divide by the Statistics NZ medium estimate for the population 18 years and over, as at 30 June for the year.

## EXPENDITURE TREND

### Casinos

**Figure 4-1 Per capita casino expenditure (inflation adjusted) – New Zealand (2011-12 to 2020-21) (\$NZ)**



Source: New Zealand Department of Internal Affairs (2022) Gambling expenditure statistics report: Gambling operators' key financial statistics (inflation adjusted)

**Table 4-8 Per capita casino expenditure (inflation adjusted) in New Zealand (2011-12 to 2020-21) (\$NZ)**

| Year    | Per Capita \$NZ |
|---------|-----------------|
| 2011-12 | 144.00          |
| 2012-13 | 144.00          |
| 2013-14 | 138.00          |
| 2014-15 | 145.00          |
| 2015-16 | 156.00          |
| 2016-17 | 146.00          |
| 2017-18 | 143.00          |
| 2018-19 | 147.00          |
| 2019-20 | 115.00          |
| 2020-21 | 123.00          |

Source: New Zealand Department of Internal Affairs (2022) Gambling expenditure statistics report: Gambling operators' key financial statistics (inflation adjusted)

For some gambling forms, legislation dictates the minimum payout ratios to players – gaming machine play, for instance, must adhere to the following returns (although in practice, payout ratios are commonly higher than that which is required by law).

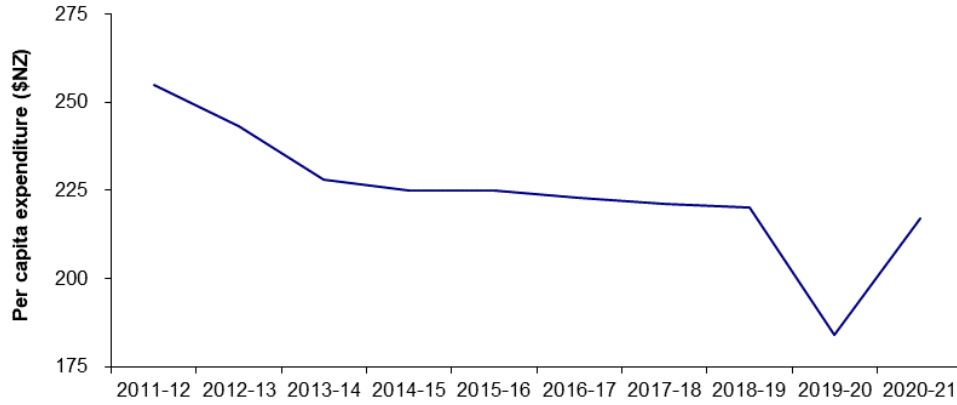
**Table 4-9 Average player return percentages (RTP) for gaming machines in New Zealand (2022)**

|             | Casino | Hotels and clubs (Class 4) |
|-------------|--------|----------------------------|
| New Zealand | 87.00% | 78.00%                     |

Source: Australia/New Zealand Gaming Machine National Standard, Revision 11.1, February 2022.

### Electronic Gaming Machines

**Figure 4-2 Per capita gaming machine expenditure (inflation adjusted) – New Zealand (2011-12 to 2020-21) (\$NZ)**



Source: New Zealand Department of Internal Affairs (2022) Gambling expenditure statistics report: Gambling operators' key financial statistics (inflation adjusted)

**Table 4-10 Per capita gaming machine expenditure (inflation adjusted) in New Zealand (2011-12 to 2020-21) (\$NZ)**

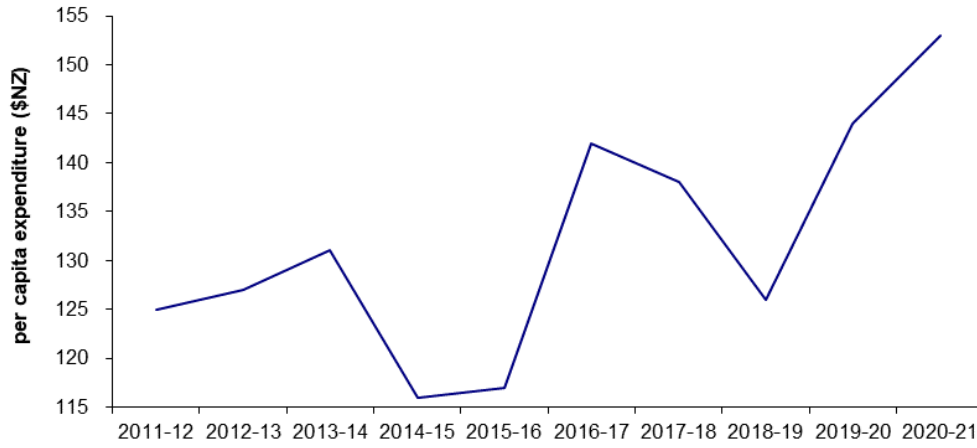
| Year    | Per Capita \$NZ |
|---------|-----------------|
| 2011-12 | 255.00          |
| 2012-13 | 243.00          |
| 2013-14 | 228.00          |
| 2014-15 | 225.00          |
| 2015-16 | 225.00          |
| 2016-17 | 223.00          |
| 2017-18 | 221.00          |
| 2018-19 | 220.00          |
| 2019-20 | 184.00          |
| 2020-21 | 217.00          |

Source: New Zealand Department of Internal Affairs (2022) Gambling expenditure statistics report: Gambling operators' key financial statistics (inflation adjusted)



**Lotteries**

**Figure 4-3 Per capita lottery expenditure (inflation adjusted) – New Zealand (2011-12 to 2020-21) (\$NZ)**



Source: New Zealand Department of Internal Affairs (2022) Gambling expenditure statistics report: Gambling operators' key financial statistics (inflation adjusted)

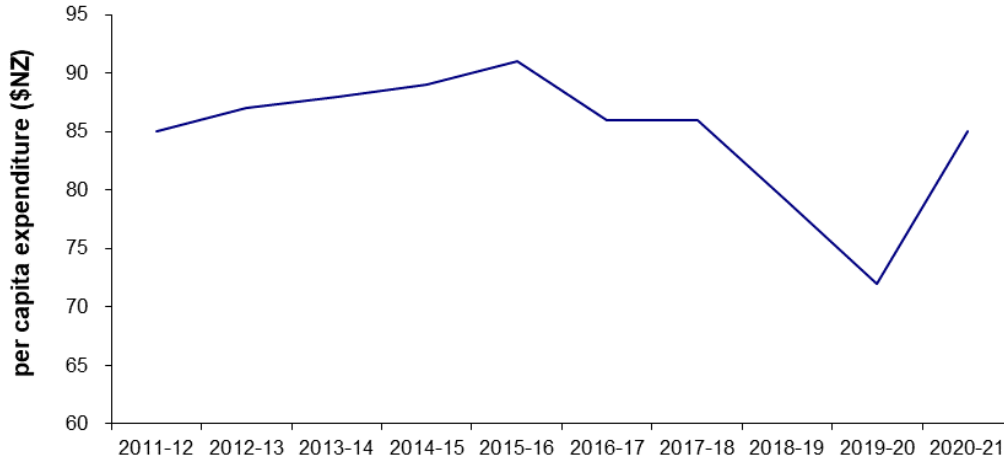
**Table 4-11 Per capita lottery expenditure (inflation adjusted) in New Zealand (2011-12 to 2020-21) (\$NZ)**

| Year    | Per Capita \$NZ |
|---------|-----------------|
| 2011-12 | 125.00          |
| 2012-13 | 127.00          |
| 2013-14 | 131.00          |
| 2014-15 | 116.00          |
| 2015-16 | 117.00          |
| 2016-17 | 142.00          |
| 2017-18 | 138.00          |
| 2018-19 | 126.00          |
| 2019-20 | 144.00          |
| 2020-21 | 153.00          |

Source: New Zealand Department of Internal Affairs (2022) Gambling expenditure statistics report: Gambling operators' key financial statistics (inflation adjusted)

Wagering

Figure 4-4 Per capita wagering expenditure (inflation adjusted) – New Zealand (2011-12 to 2020-21) (\$NZ)



Source: New Zealand Department of Internal Affairs (2022) Gambling expenditure statistics report: Gambling operators' key financial statistics (inflation adjusted)

Table 4-12 Per capita wagering expenditure (inflation adjusted) in New Zealand (2011-12 to 2020-21) (\$NZ)

| Year    | Per Capita \$NZ |
|---------|-----------------|
| 2011-12 | 85.00           |
| 2012-13 | 87.00           |
| 2013-14 | 88.00           |
| 2014-15 | 89.00           |
| 2015-16 | 91.00           |
| 2016-17 | 86.00           |
| 2017-18 | 86.00           |
| 2018-19 | 79.00           |
| 2019-20 | 72.00           |
| 2020-21 | 85.00           |

Source: New Zealand Department of Internal Affairs (2022) Gambling expenditure statistics report: Gambling operators' key financial statistics (inflation adjusted)

## HOUSEHOLD SPENDING COMPARISON

Statistics New Zealand produces a regular *Household Economic Survey* which records the expenditure of a sample of New Zealand households. The latest household expenditure statistics available are for the 2018-19 period. Comparisons between the results gained in 2016 and 2019 are also possible and outlined in Table 4-14. Note that both surveys were based on self-report and gambling expenditure may be under-reported.

**Table 4-13** Estimated household weekly expenditure on selected goods and services in New Zealand by expenditure (\$) and proportion of total expenditure (%) (2018/19)

|  | Average weekly expenditure per household | Expenditure as percentage of total net expenditure |
|--|--|--|
|  | \$NZ                                     | %  |
| Food   | 233.60                                   | 17.3   |
| Restaurant meals                             | 26.50                                    | 2.0  |
| Alcohol, tobacco products & illicit drugs    | 29.40                                    | 2.2  |
| Clothing and shoes                           | 36.70                                    | 2.7  |
| Housing and household utilities              | 344.20                                   | 25.5   |
| Household furniture, appliances and contents | 51.30                                    | 3.8  |
| Health products and medical services         | 41.90                                    | 3.1  |
| Transportation and travel                    | 215.80                                   | 16.0   |
| Communication                                | 39.00                                    | 2.9  |
| Recreation and culture goods and services    | 130.00                                   | 9.6  |
| <b>Games of chance</b>                       | <b>4.40</b>                              | <b>0.3</b>   |
| Education                                    | 19.50                                    | 1.4  |
| Miscellaneous goods and services             | 114.20                                   | 8.5  |
| Other expenditure                            | 133.60                                   | 9.9  |

Source: Statistics New Zealand (2020) Household Economic Survey, Year End 30 June 2019.

**Table 4-14 Comparison of selected goods and services in New Zealand by expenditure (\$) (2012/13 & 2018/19)**

|  | Average weekly expenditure per household 2015/16 | Average weekly expenditure per household 2018/19 |
|--|--|--|
|  | \$NZ   | \$NZ   |
| Food   | 213.90   | 233.60   |
| Restaurant meals                             | 23.60  | 26.50  |
| Alcohol, tobacco products & Illicit drugs    | 30.40  | 29.40  |
| Clothing and shoes                           | 31.90  | 36.70  |
| Housing and household utilities              | 323.20   | 344.20   |
| Household furniture, appliances and contents | 47.30  | 51.30  |
| Health products and medical services         | 37.80  | 41.90  |
| Transportation and travel                    | 189.70   | 215.80   |
| Communication                                | 35.20  | 39.00  |
| Recreation and culture goods and services    | 115.10   | 130.00   |
| <b>Games of chance<sup>7</sup></b>           | <b>5.00</b>                                      | <b>4.40</b>                                      |
| Education                                    | 21.50  | 19.50  |
| Miscellaneous goods and services             | 111.60   | 114.20   |
| Other expenditure                            | 142.20   | 133.60   |

Source: Statistics New Zealand (2020) Household Economic Survey, Year End 30 June 2019.

<sup>7</sup> Note: Expenditure is reported as a gross figure.