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# A GUIDE TO AUSTRALASIA'S GAMBLING INDUSTRIES

Facts, Figures and Statistics

## CHAPTER NINE

Gambling Participation

2015/16

# A Guide to Australasia's Gambling Industries

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## Chapter 9

# Gambling Participation - Australia and New Zealand

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### Version Control

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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.

## GAMBLING PARTICIPATION IN AUSTRALIA (NATIONAL)

In Australia the legal age for participation in gambling is 18 years. In 1999, the Productivity Commission (PC) undertook a wide-ranging study of gambling throughout the nation.<sup>1</sup> Since this time nearly all Australian states and territories have conducted prevalence surveys that indicate levels of participation by the adult population in the various gambling forms available.

In 2009 an updated national PC report into gambling noted stabilisation in gambling participation growth rates and pointed to reduced participation across the industry as a whole. The PC concluded that the statistical evidence available from state/territory reports was generally consistent with a maturing market across most available gambling forms.<sup>2</sup>

A subsequent national study, conducted for Gambling Research Australia (GRA) in the 2010-11 period, established a national gambling prevalence figure of 64.26%<sup>3</sup> of Australian adults (participating in some form of gambling at least once during the 2010-11 period).

This study also showed significant declines in participation rates for most gambling forms – the exception to the rule being sports betting where participation rates more than doubled, albeit from a low base.

**Table 9-1 Gambling participation (all forms) as a % of the adult population by state/territory (1999-2015)**

	ACT (%)	NSW (%)	NT (%)	QLD (%)	SA (%)	TAS (%)	VIC (%)	WA (%)
1999 <sup>4</sup>	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	-	-	-	-	-	-	-
2010-11 <sup>5</sup>	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	-	-

Source: Productivity Commission (2010) *Gambling, Report no. 50*, Canberra, Hing, N., Gainsbury, S., Blaszczyński, A., Wood, R., Lubman, D. and Russell, A. (2014) *Interactive Gambling, Gambling Research Australia with state/territory updates compiled by the AGC*.

<sup>1</sup> Productivity Commission (1999) *Australia's Gambling Industries, Report No 10*, Ausinfo, Canberra.

<sup>2</sup> Productivity Commission (2010) *Gambling, Report no. 50*, Canberra.

<sup>3</sup> Hing, N., Gainsbury, S., Blaszczyński, A., Wood, R., Lubman, D. and Russell, A. (2014) *Interactive Gambling, Gambling Research Australia* p 80.

<sup>4</sup> Productivity Commission (1999) *Australia's Gambling Industries, Report No 10*, Ausinfo, Canberra.

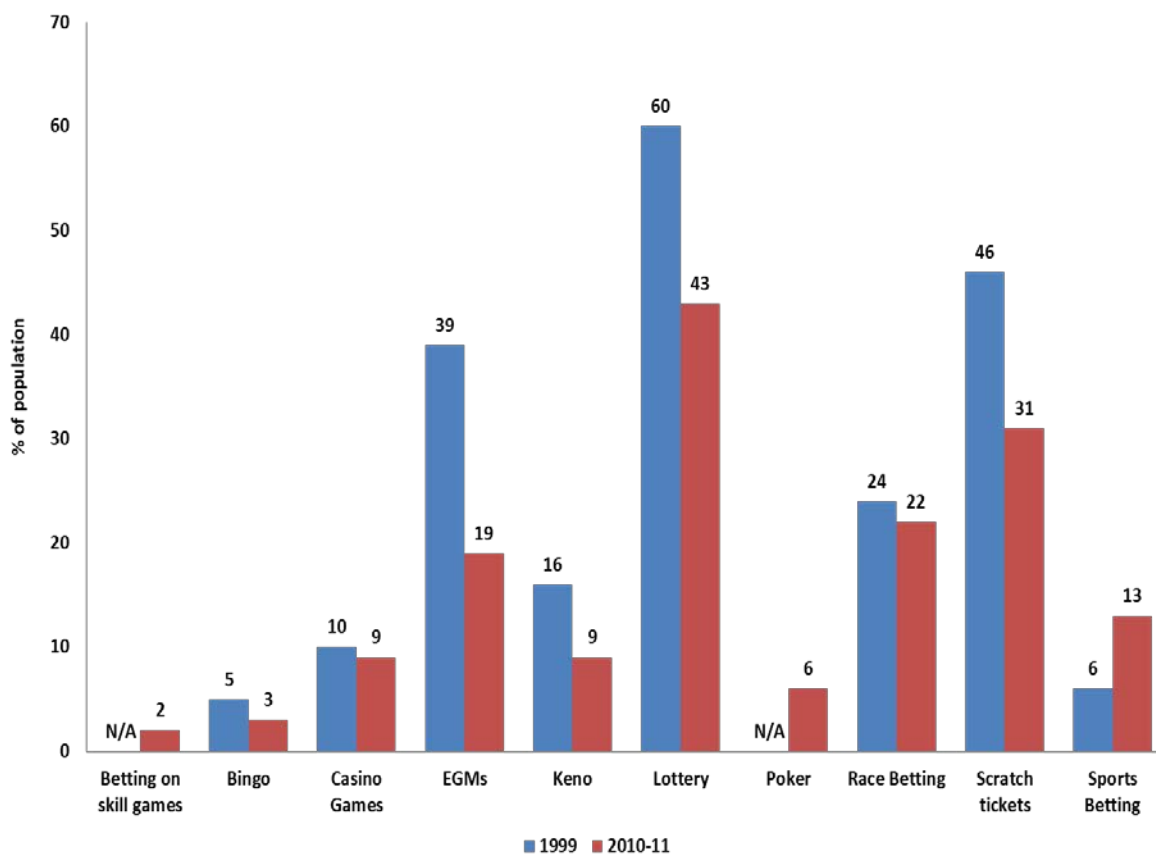
<sup>5</sup> Hing, N., Gainsbury, S., Blaszczyński, A., Wood, R., Lubman, D. and Russell, A. (2014) *Interactive Gambling, Gambling Research Australia*.

**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	2.94
Casino table games	8.71
Electronic gaming machines	19.43
Horse or dog race betting	22.42
Instant scratch tickets	31.49
Keno	8.90
Lottery, lotto or pools tickets	43.19
Other games of skill	1.61
Poker	5.94
Sports betting	13.28

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

**Figure 9-1 Comparing Australian Gambling Participation by Form of Activity (1999 and 2010-2011)**



Source: 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*.

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

### Overview

Estimates of adult gambling prevalence (participation rates) represented in the following graphs refer to participation rates as a percentile of the adult population for the period and jurisdiction(s) indicated.

1999 figures are drawn from the Productivity Commission's (PC's) 1999 report<sup>6</sup> – which provided national gambling participation estimates as well as gambling participation estimates as a percentile of the population in each state and territory.

Figures for all years subsequent to 1999 are derived from state/territory commissioned prevalence studies.

Please note that methodological differences in some surveys mean that **comparisons over time should only be made with caution.**

**Please see the further section on Internet gambling participation for a more detailed exploration of survey findings regarding participation rates via Internet or mobile technologies.**

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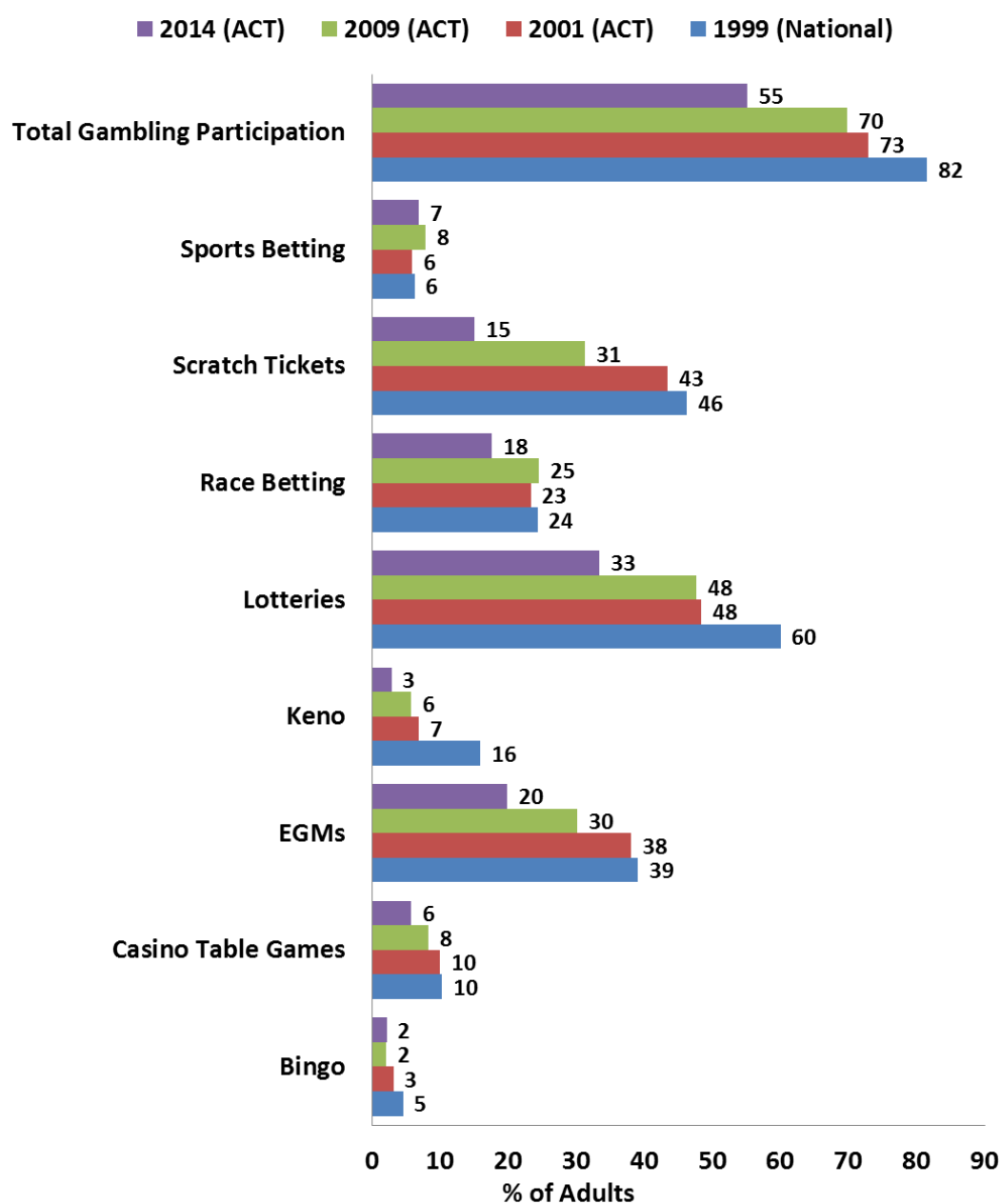
<sup>6</sup> Productivity Commission (1999) *Australia's Gambling Industries, Report No 10*, Ausinfo, Canberra.

### Australian Capital Territory

An ACT prevalence survey undertaken in 2001<sup>7</sup> reported that 72.9% of ACT adults participated in at least one gambling activity in the previous 12 month period. The next prevalence study undertaken in this jurisdiction, in 2009<sup>8</sup>, reported a slight decrease in overall ACT gambling participation levels to 69.8%.

Findings of a prevalence study undertaken in 2014 in the ACT have since reported that overall gambling participation rates have since dropped further, to some 55.1% of the adult population.<sup>9</sup>

**Figure 9-2 Australian Capital Territory Gambling Participation (Select Forms of Activity) 2001-2009 as a percentile of the ACT Population 18+**



<sup>7</sup> Australian Institute for Gambling Research (2001) *Survey of the Nature and Extent of Gambling and Problem Gambling in the ACT*, University of Western Sydney.

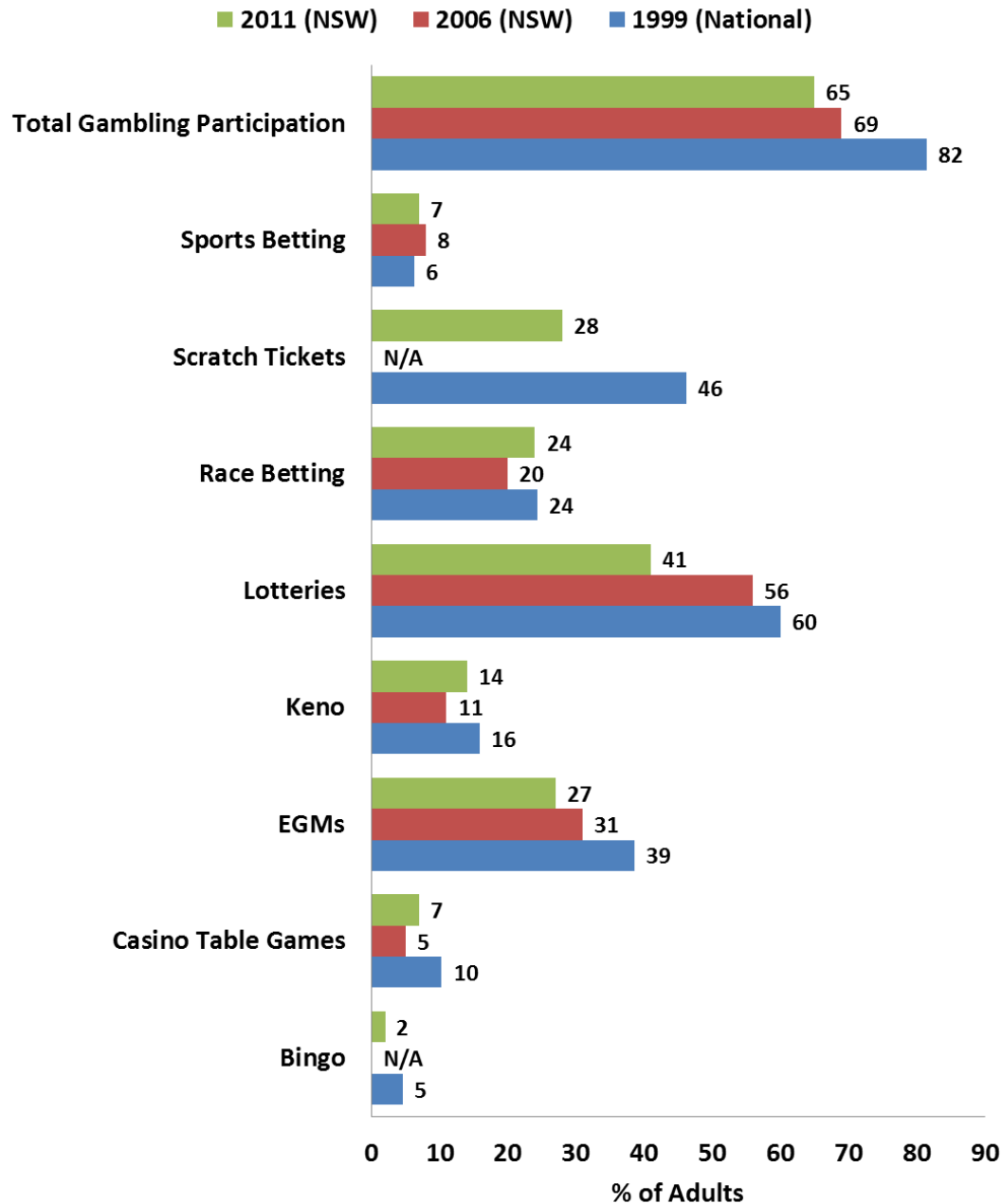
<sup>8</sup> Davidson, T. and Rodgers, B. (2010) *2009 Survey of the Nature and Extent of Gambling, and Problem Gambling in the Australian Capital Territory*, Australian National University.

<sup>9</sup> Australian National University (2015) *2014 Survey on Gambling, Health and Wellbeing in the ACT*, ACT Government.

**New South Wales**

In 2011 a NSW Gambling Prevalence Survey<sup>10</sup> found that 65% of the NSW 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 2006 survey.<sup>11</sup>

**Figure 9-3 New South Wales Gambling Participation (Select Forms of Activity) 1999-2011 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.

<sup>10</sup> Ogilvy Illumination (2012) *Prevalence of Gambling and Problem Gambling in New South Wales*, NSW Department of Liquor, Gaming and Racing.

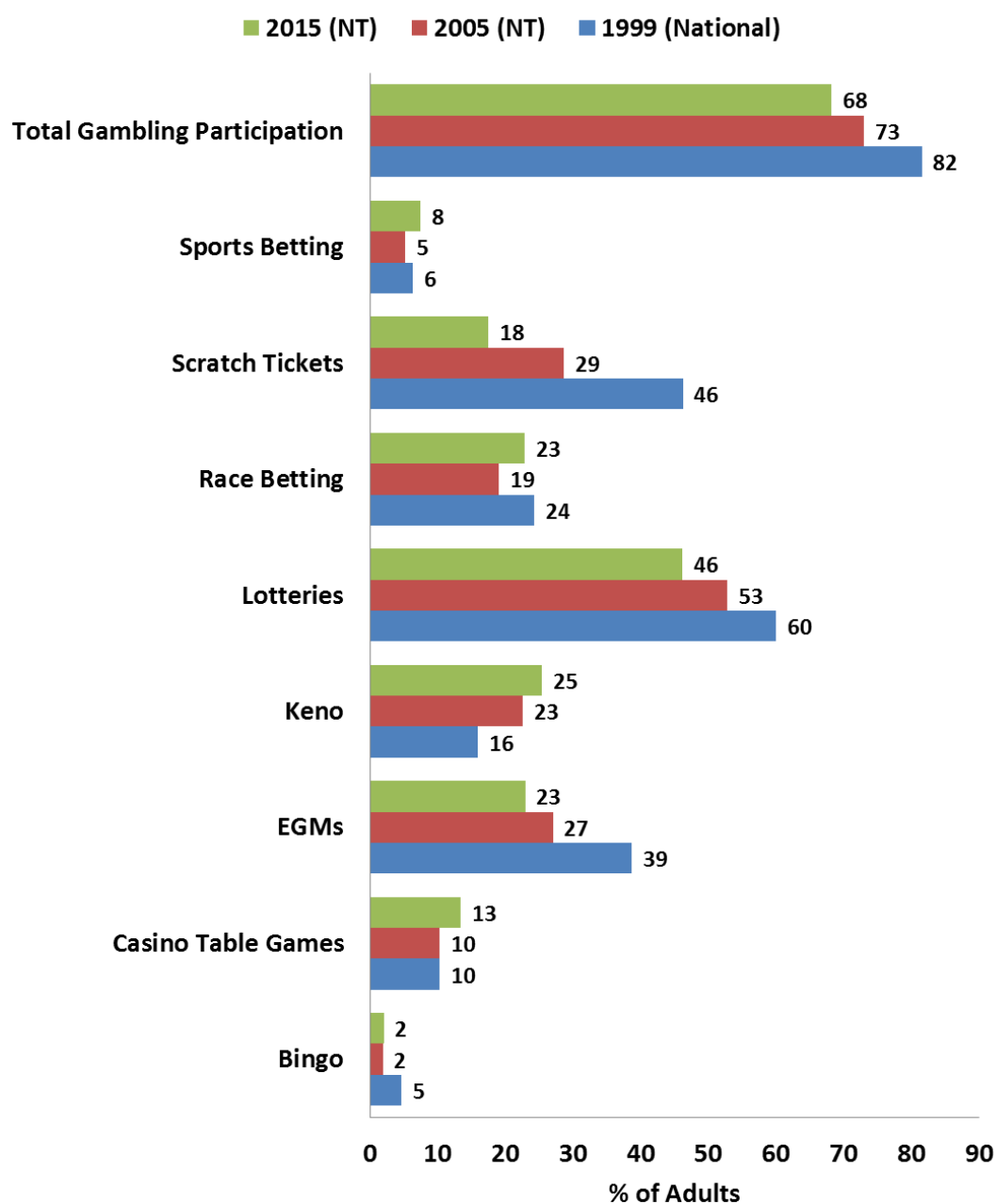
<sup>11</sup> AC Nielsen (2007) *Prevalence of Gambling and Problem Gambling in NSW – A Community Survey 2006*, NSW Office of Liquor, Gaming and Racing.



### Northern Territory

A Northern Territory prevalence study conducted in 2005<sup>12</sup> found that 73% of adult residents participated in at least one gambling activity during the 12-month period preceding the survey. 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) and casino table games and Keno (which had non-significant increases).<sup>13</sup>

**Figure 9-4 Northern Territory Gambling Participation (Select Forms of Activity) 1999-2005 as a percentile of the NT Population 18+**



<sup>12</sup> Charles Darwin University, School for Social and Policy Research and School of Health Sciences (2006) *Northern Territory Gambling Prevalence Survey 2005*.

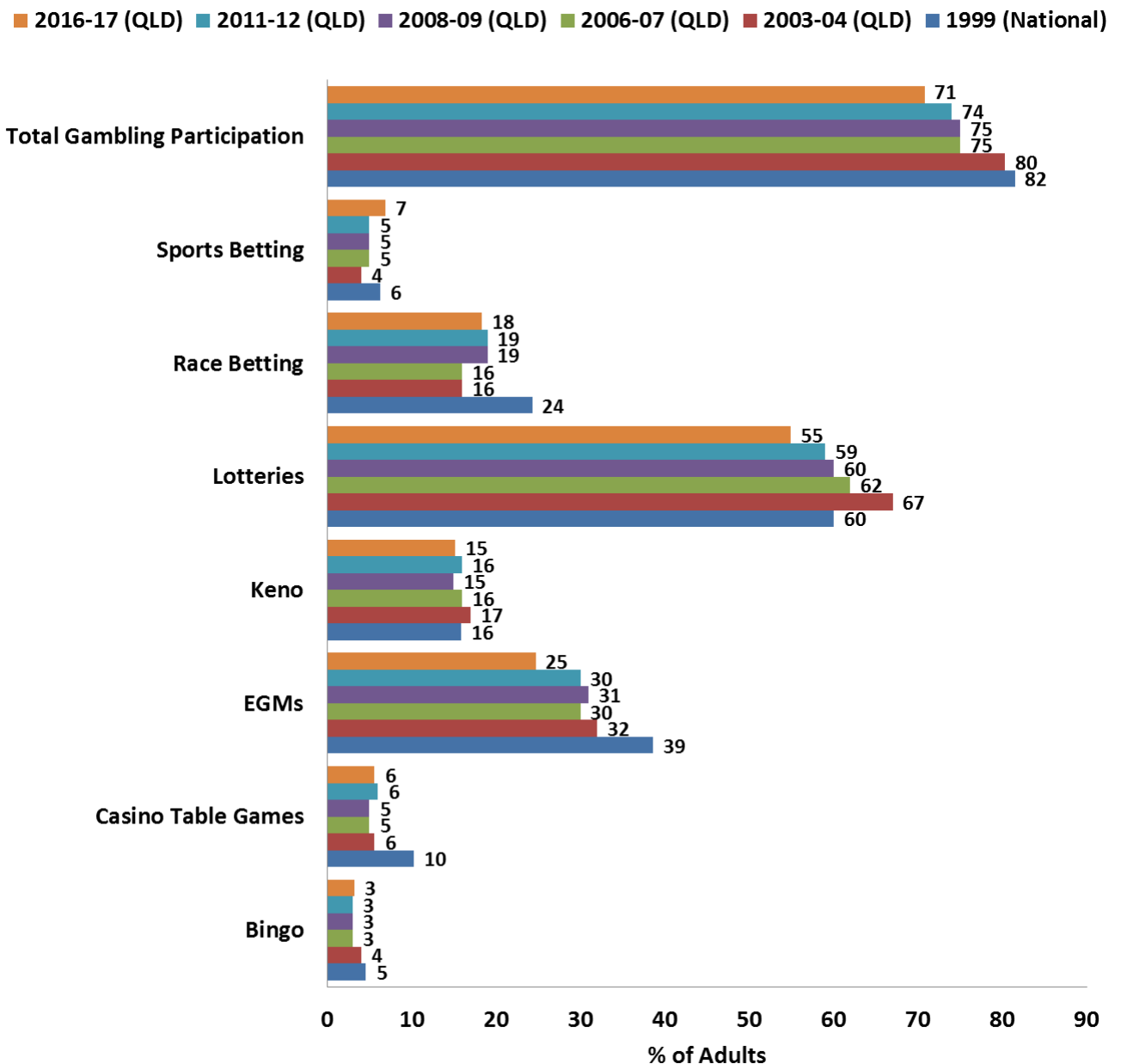
<sup>13</sup> Stevens, M. (2017) *Northern Territory Gambling Prevalence and Wellbeing Survey Report*, Menzies School of Health Research. Please note the figure provided for total gambling participation excludes people who gambled on raffles only and no other activities. If included this group bring the total participation figure to 76% of the NT population.

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 Survey<sup>14</sup> indicated that overall gambling participation in this jurisdiction comprised approximately 71% of the adult population – a decrease on results found by previous surveys.

Figure 9-5 Queensland Gambling Participation (Select Forms of Activity) 1999-2016-17<sup>15</sup> 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%.

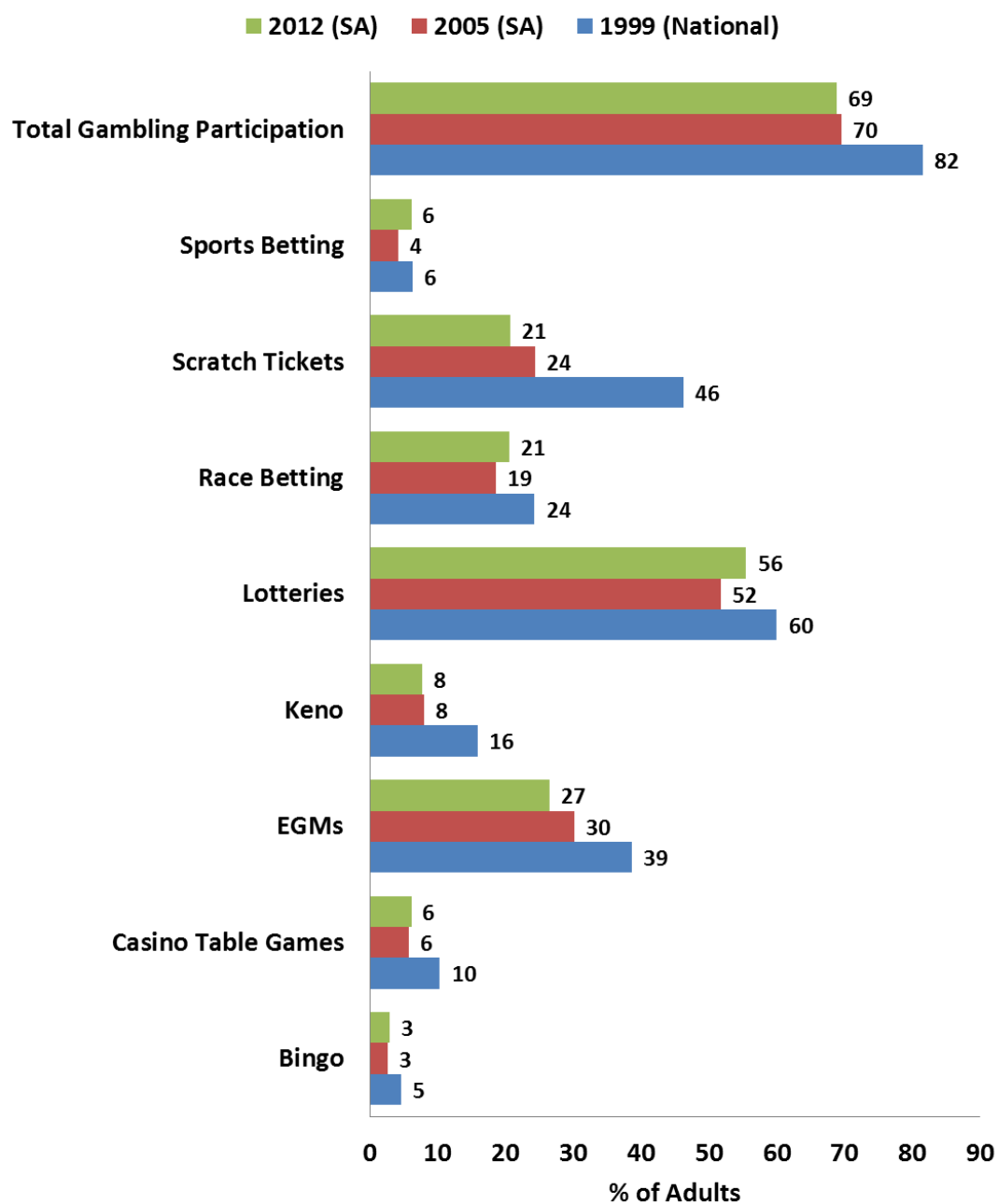
<sup>14</sup> Queensland Government, Department of Justice and Attorney General (2018) *Queensland Household Gambling Survey 2016-17*. See also Queensland Government (2005) *Queensland Household Gambling Survey 2003-04*, Queensland Government (2008) *Queensland Household Gambling Survey 2006-07*, Queensland Government (2010) *Queensland Household Gambling Survey 2008-09* and Queensland Government (2012) *Queensland Household Gambling Survey 2011-12*.

<sup>15</sup> Changes in sampling methodology mean that comparisons between the 2016-17 survey and previous surveys should be made with caution.

### South Australia

Gambling prevalence in South Australia was last studied in 2012.<sup>16</sup> This study showed the overall gambling participation rate of South Australian adults to be 68.8%. Results of the 2012 survey showed a decrease to the total participation rate found in a previous study conducted for the October-Dec 2005 period.<sup>17</sup>

**Figure 9.6 South Australian Gambling Participation (Select Forms of Activity) 1999-2012 as a percentile of the SA Population 18+**



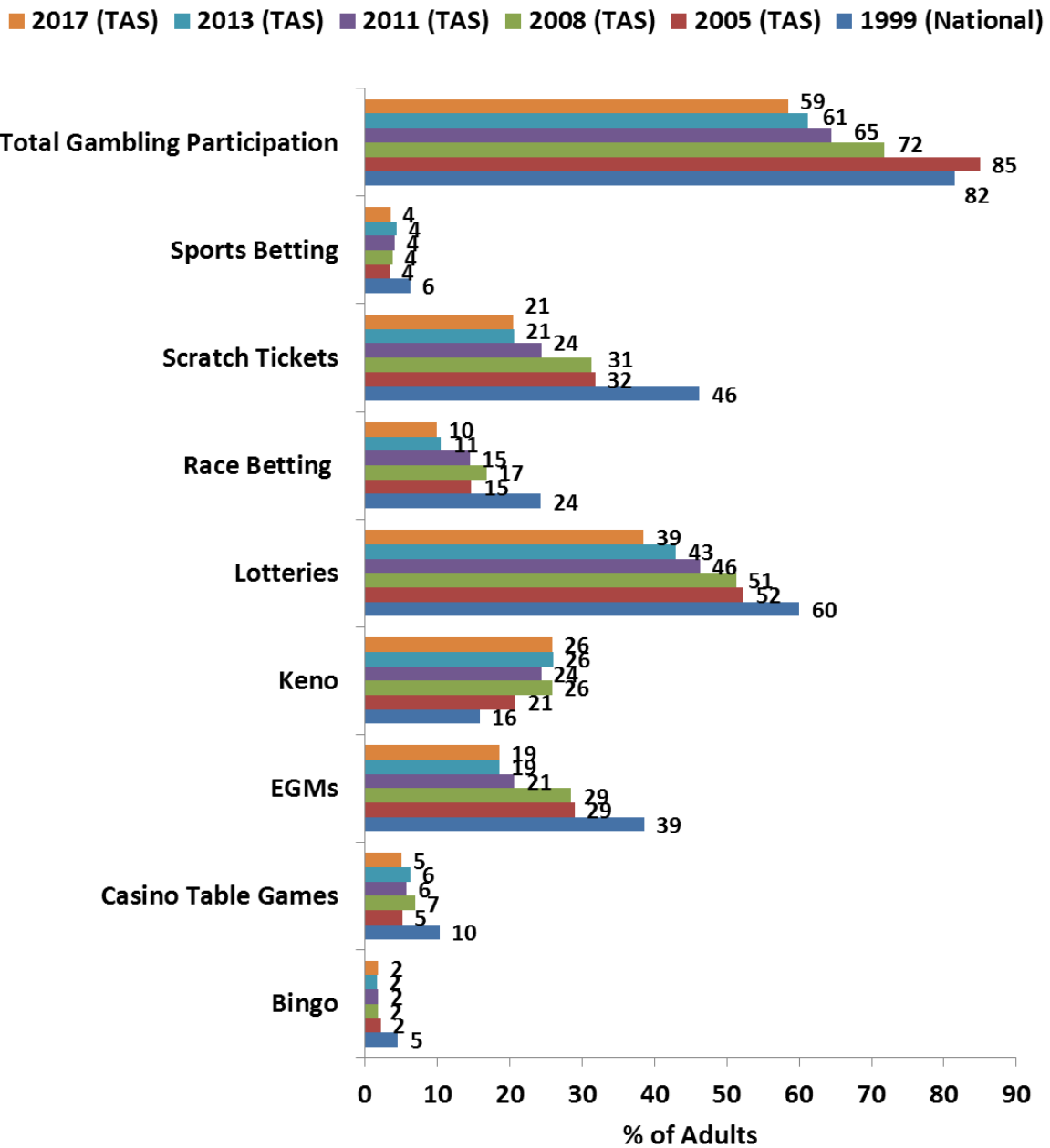
<sup>16</sup> Office of Problem Gambling, Department for Communities and Social Inclusion (2013) *Gambling Prevalence in South Australia 2012*.

<sup>17</sup> South Australian Department for Families and Communities (2006) *Gambling Prevalence in South Australia: October to December 2005*.

Tasmania

In Tasmania the prevalence of gambling was surveyed most recently in 2017<sup>18</sup>. Previous studies were published in 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, and 61.2% of adult Tasmanians in 2013. The 2017 survey found a participation rate in gambling activities by Tasmanian adults of 58.5% - a further decline from the 2013 period.

Figure 9-7 Tasmanian Gambling Participation (Select Forms of Activity) 1999-2017 as a percentile of the TAS population 18+<sup>19</sup>



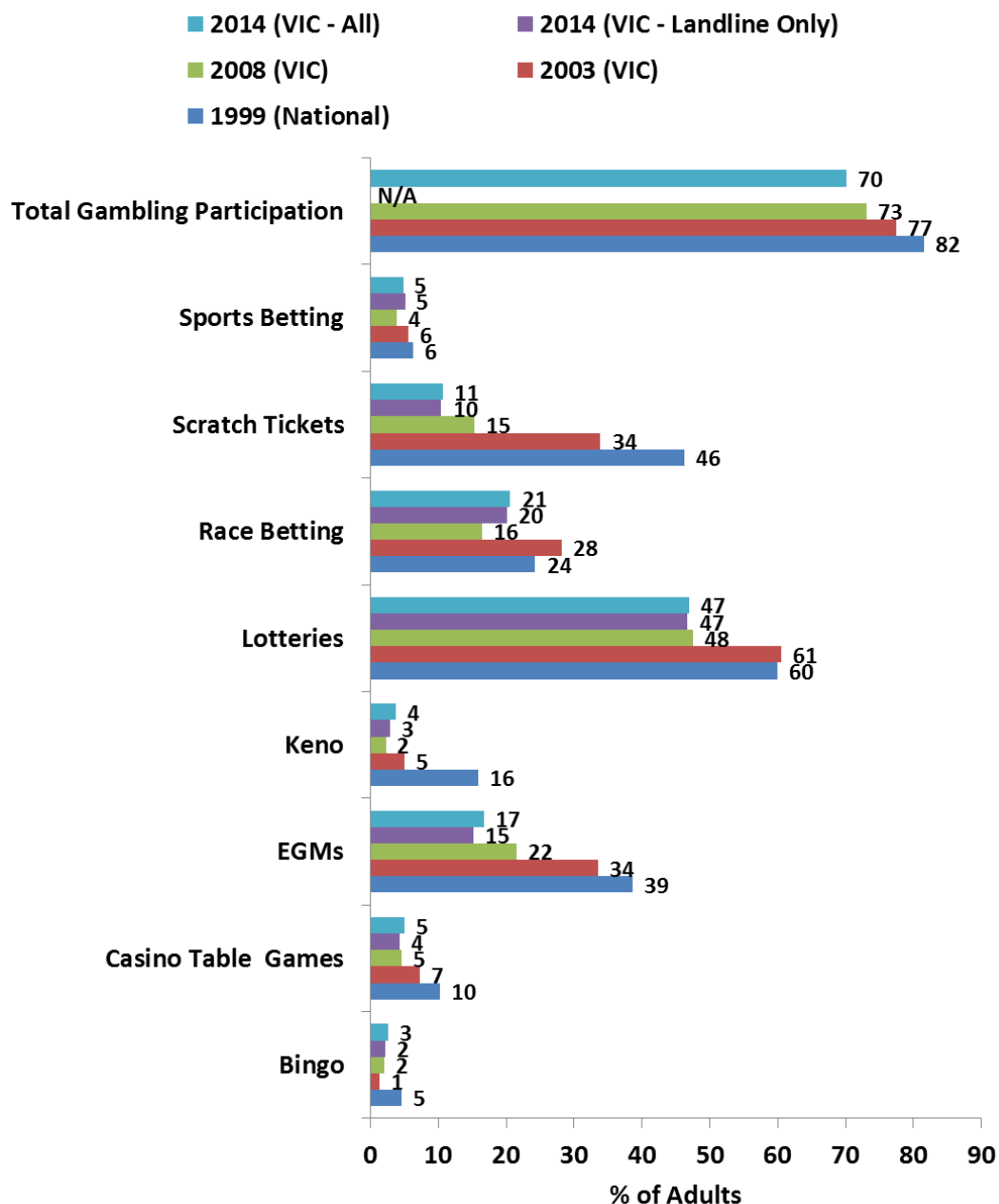
<sup>18</sup> The Allen Consulting Group, Deakin University, Central Queensland University and the Social Research Centre (2017) *Fourth Social and Economic Impact Study of Gambling in Tasmania (2017): Volume 2 Prevalence Survey*, Tasmanian Department of Treasury and Finance, Hobart.

<sup>19</sup> Please note that figures for Race Betting are separated into both on and off-course results in 2005. The Off-course figure is 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%. Similarly 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 2014 found the Victorian adult participation rate in gambling activities to be 70.1%.<sup>20</sup> This figure represents a decrease in previous participation rates found for the state - 73.1% in 2008<sup>21</sup> and 77.4% in 2003.<sup>22</sup>

**Figure 9-8 Victorian Gambling Participation (Select Forms of Activity) 1999-2014 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.

<sup>20</sup> Hare, S (2015) *Study of Gambling and Health in Victoria*, Victorian Responsible Gambling Foundation and Victorian Department of Justice and Regulation.

<sup>21</sup> Schottler Consulting Pty Ltd (2009) *A Study of Gambling in Victoria: Problem Gambling from a Public Health Perspective*, Victorian Dept of Justice.

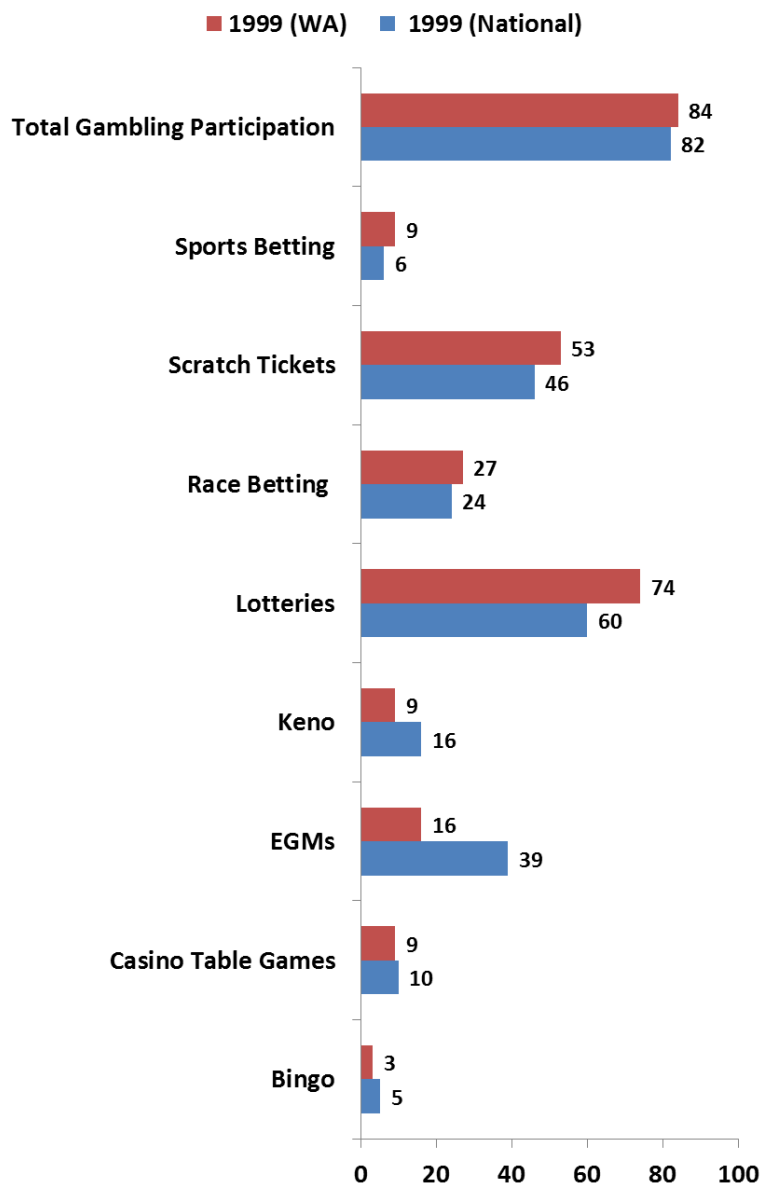
<sup>22</sup> Australian National University, Centre for Gambling Research (2004), *2003 Victorian Longitudinal Community Attitudes Survey*, Gambling Research Panel Report No 6.

## Western Australia

In the absence of any recent study, the only available gambling participation figures for Western Australia remain those provided in the Productivity Commission's 1999 report. In 1999, owing to the configuration of the Western Australian gambling environment, gambler participation rates across a number of the categories were found to differ from those found nationally.

For example, EGM gambling was, and remains, permitted only in the one casino in this state and thus had an estimated participation rate of only 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.

**Figure 9-9 Western Australian (WA) Gambling Participation and National Average Participation Figures (select Forms of Activity) 1999<sup>23</sup> as a percentile of the Adult Population**



<sup>23</sup> 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 race track events, where the Internet represents a medium through which wagers are placed".

"The *Interactive Gambling Act 20021 (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

### Participation in Interactive Gambling

The Productivity Commission's (PC's) 1999 report into gambling, as some subsequent state/territory reports, surveyed respondents for Internet gambling participation – where Internet gambling participation was defined as gambling on casino type games via the internet (eg: table games/poker/EGMs).

The PC's recorded figures for state/territory Internet gambling participation rates in 1998-99 were generally very low (<0.5% of the population for most states/territories) with approximately 90,000 Australians gambling on the Internet nationally or 0.6%.<sup>24</sup>

In 2010 the PC estimated that approximately 0.1-0.4.3% of the adult population had participated in Internet gambling over the previous 12 month period.

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).<sup>25</sup>

This study (which defined 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.**<sup>26</sup>

The study found that most interactive gamblers (54.91% of n=849) reported first accessing the Internet to gamble in or later than 2009.

Most preferred to access Internet 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.<sup>27</sup>

The 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.<sup>28</sup>

<sup>24</sup> Productivity Commission (2010) *Gambling, Report no. 50*, Canberra.

<sup>25</sup> Hing, N., Gainsbury, S., Blaszczynski, A., Wood, R., Lubman, L. and Russell, A. (2014) *Interactive Gambling*, Gambling Research Australia.

<sup>26</sup> Ibid p 84

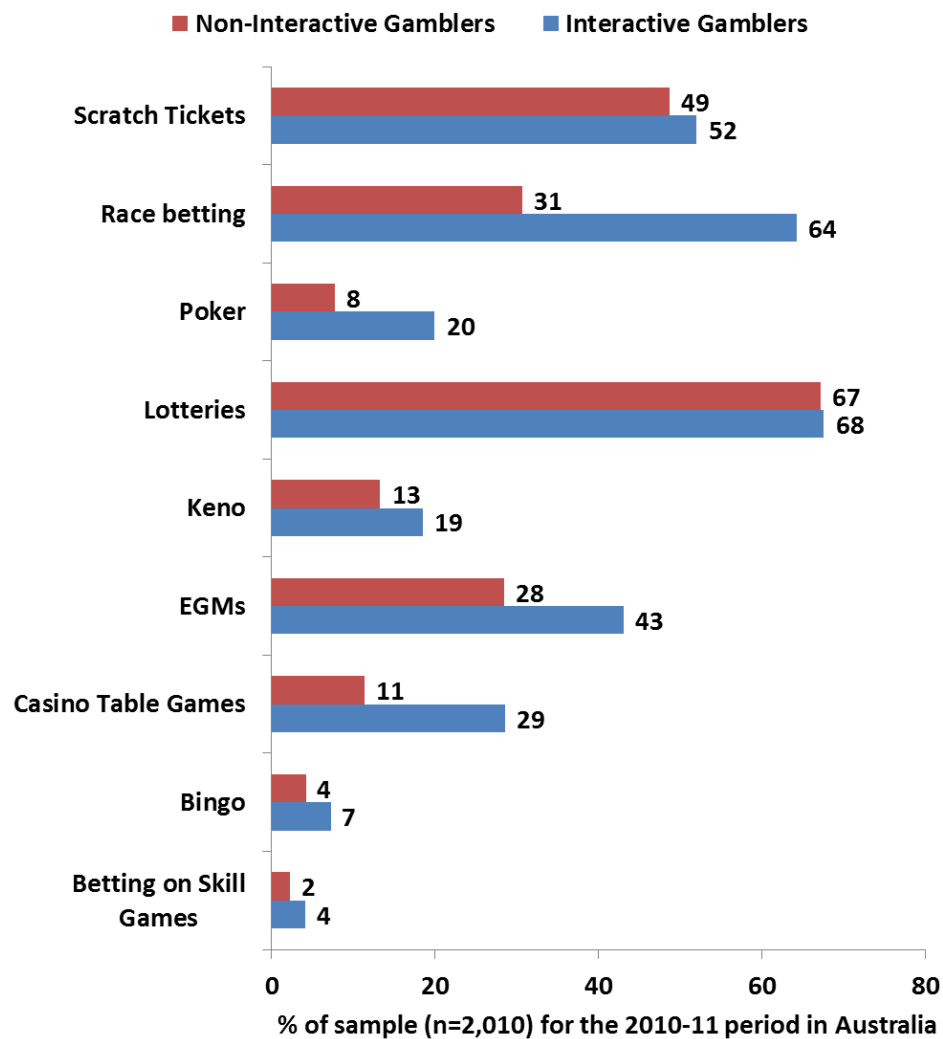
<sup>27</sup> Ibid p91

The GRA study also found that interactive gamblers reported engaging in a significantly higher number of gambling activities 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.<sup>29</sup>

### 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)<sup>30</sup>



<sup>28</sup> Hing, N., Gainsbury, S., Blaszczynski, A., Wood, R., Lubman, L. and Russell, A. (2014) *Interactive Gambling*, Gambling Research Australia p 91.

<sup>29</sup> Ibid p88

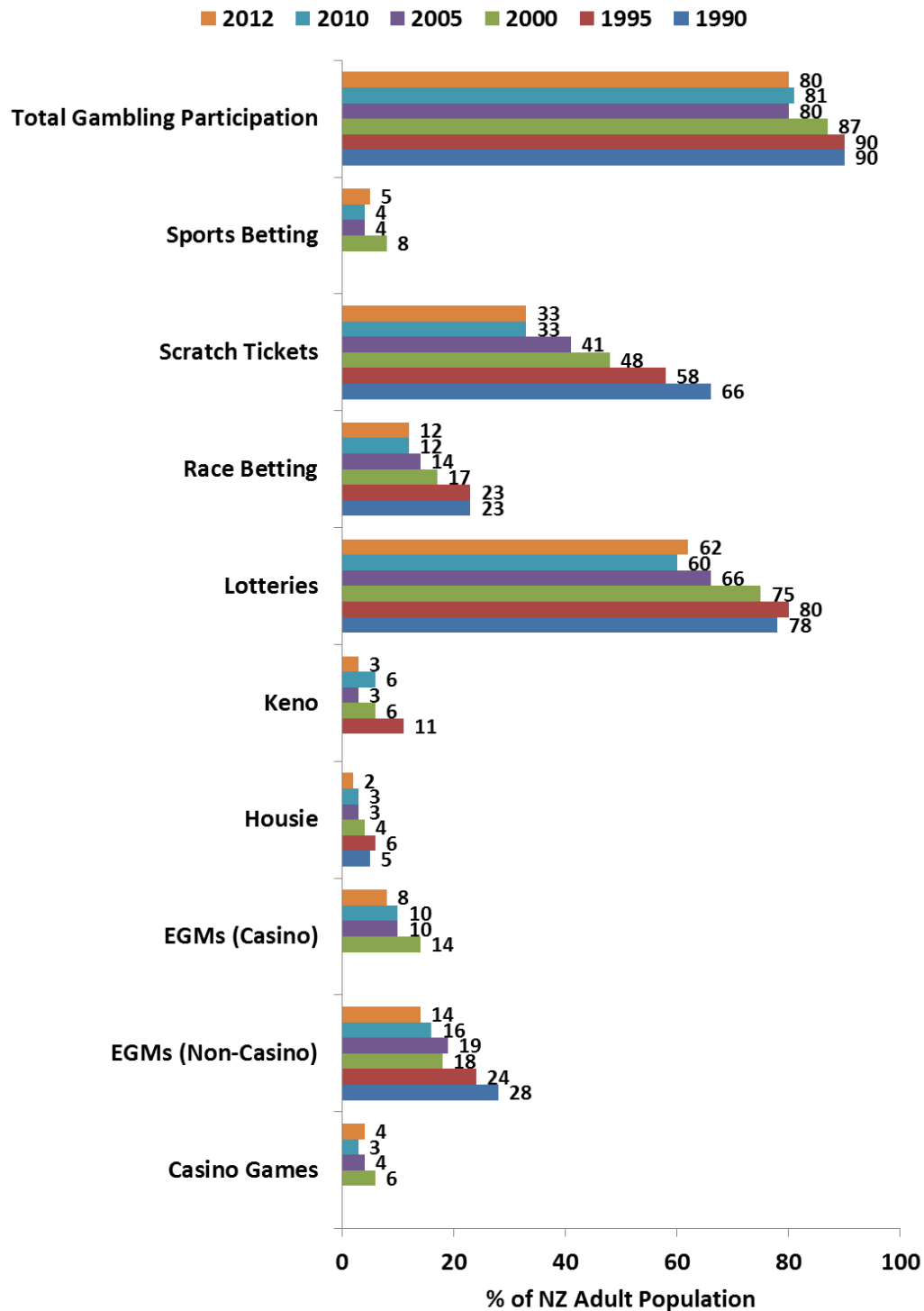
<sup>30</sup> Ibid p88 percentiles taken from Table 4.6



## GAMBLING PARTICIPATION IN NEW ZEALAND (NZ)

New Zealand conducted Gambling Participation Surveys at five yearly intervals from 1985 - 2005.<sup>31</sup> Following this series, the most recent survey information pertains to 2012.<sup>32</sup>

Figure 9-11 New Zealand Gambling Participation 1990-2012<sup>33</sup>



<sup>31</sup> 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.*

<sup>32</sup> 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 p120.

<sup>33</sup> 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.