



Gemba

Racing, Chasing and Pacing – Horse Racing Betting Insights

GEMBA

INSIGHTS REPORT | NOVEMBER 2021



Gemba

With the 2021 Spring Carnival upon us, Horse Racing is about to take its place front and centre of Australian sport.

In Gemba's first Racing, Pacing and Chasing report, we dive into the habits and preferences of Horse Racing fans, providing insight into a unique segment of the sporting landscape.

METHODOLOGY AND OVERVIEW

METHODOLOGY

The data in this report comes from two sources, utilising insights from our extensive proprietary research, as well as a piece of custom research conducted specifically regarding Horse Racing.

Gemba Proprietary Research

Since 2010, Gemba has conducted quantitative research via an online consumer panel to uncover the nature and tendencies of fans of sport and entertainment in Australia. Conducted on a monthly basis, the specifications of the survey are as follows:

- **Sample:** Total Population
 - Aged 16+
- **Distribution:** Nationally representative across gender, age and location
- **n = 650 respondents per month** or (n = 7,800 per year)

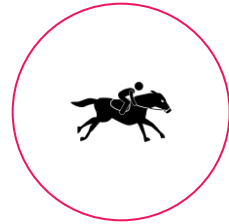
Customised Horse Racing Research

To dive deeper into the world of Horse Racing, Gemba conducted customised research into Fanatics of Horse Racing, their consumption tendencies and their betting habits and preferences.

- **Sample:** Horse Racing Fanatics (i.e. Passion is either a 4 or 5 on a 5-point scale)
- **Distribution:** Natural sample fallout according to the qualification above
- **n = 300 respondents**

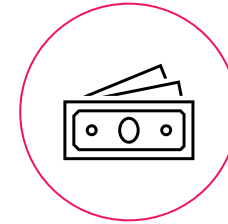


EXECUTIVE SUMMARY



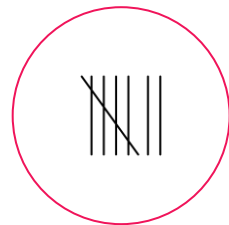
SUPPORT FOR HORSE RACING FLUCTUATES

Passion for Horse Racing fluctuates around the Autumn and Spring Carnival, bringing more casual fans into the sport



HALF OF FANS HAVE BET IN THE PAST 3 MONTHS

56% of Horse Racing Fanatics have placed a bet on the sport in the past three months, with 43% betting on a weekly basis



BETTING BEHAVIOUR

The average Horse Racing fan will place seven bets per session, at an average of \$15 per bet

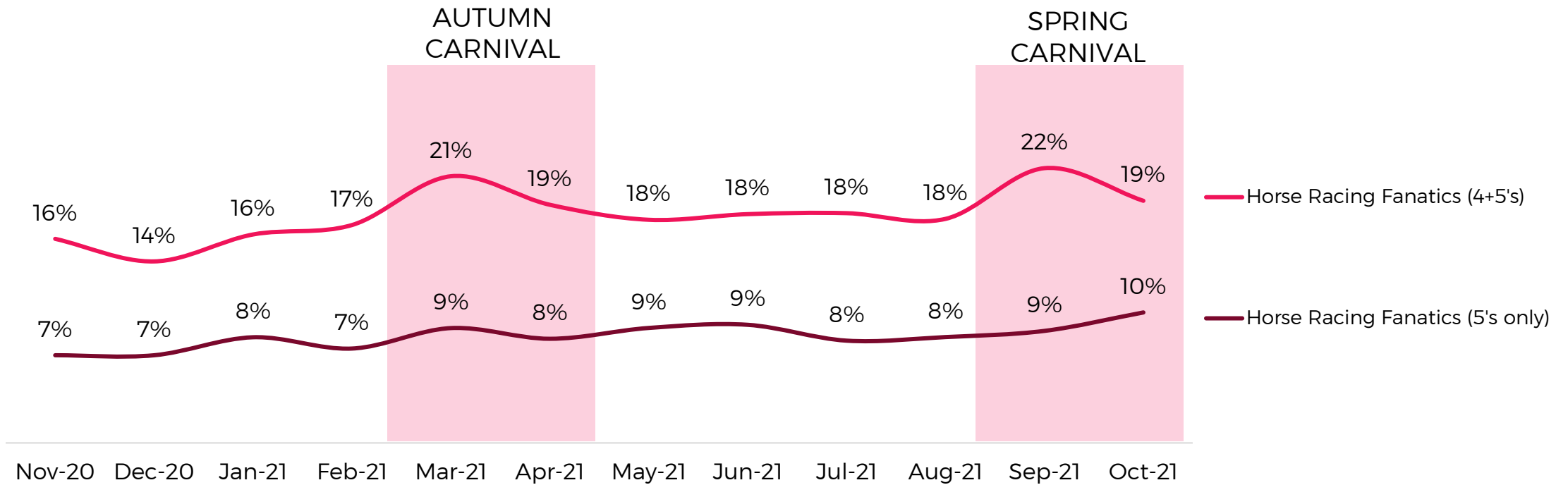


AGE INFLUENCES APP PREFERENCE

Age dictates preference for betting apps with TAB having the largest share, driven by older customers. Sportsbet dominates the 20-29 year old age group

Passion for Horse Racing fluctuates around the Autumn and Spring Carnivals, helping to bring more casual fans into the sport

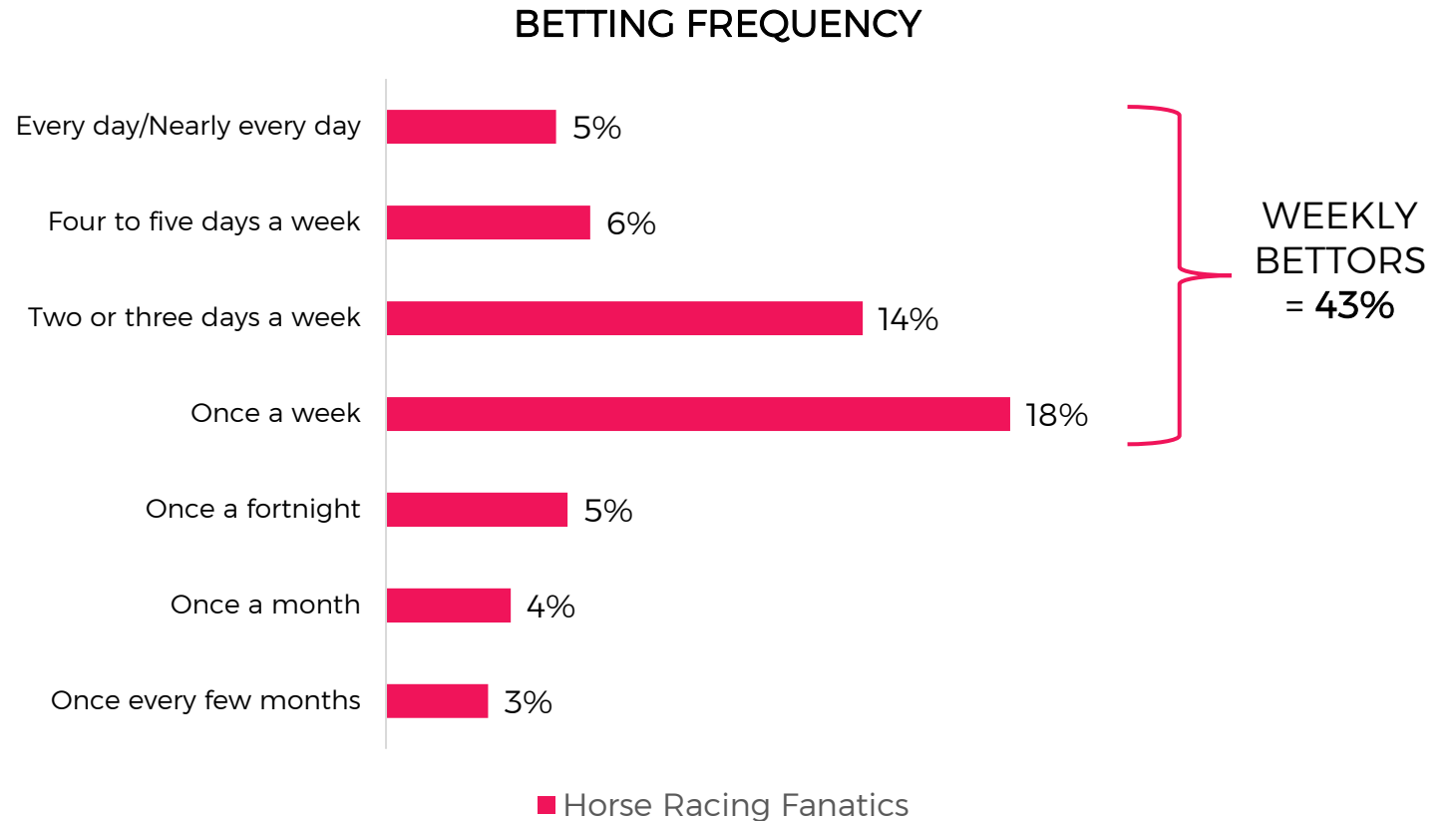
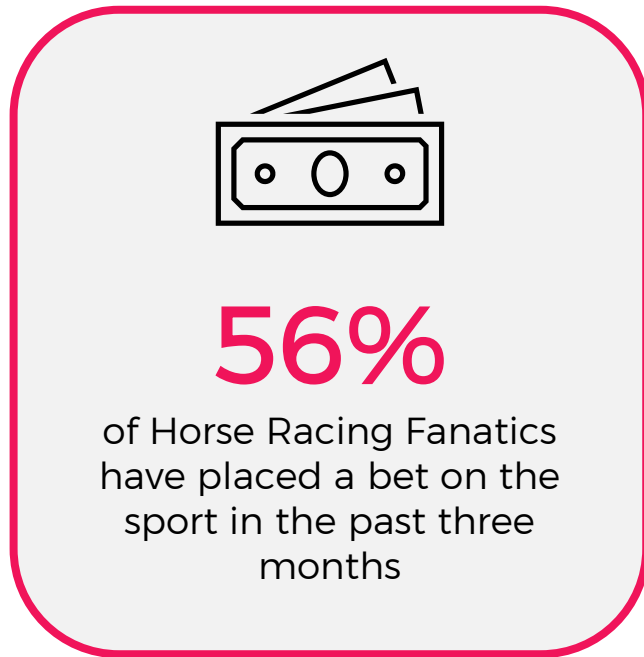
HORSE RACING PASSION | ANALYSED BY MONTH



Passion is determined by a five point scale, with 4's and 5's analysed in this question
Source: Gemba Insights Program - October 2021

In the lead up to this Spring Racing Carnival, over half of Horse Racing fanatics have placed a bet in the past three months

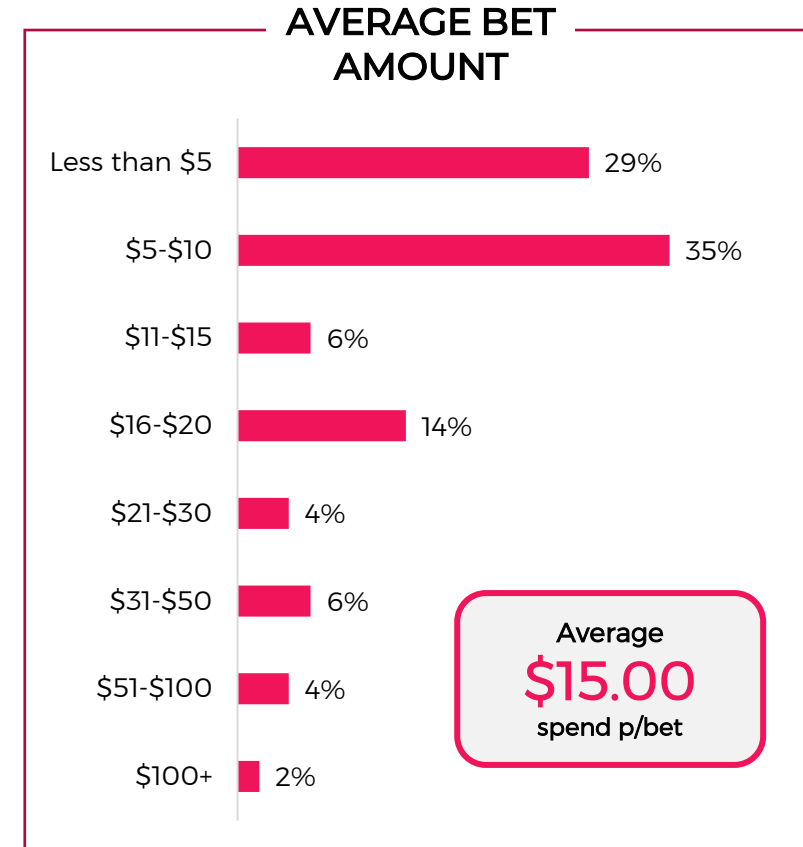
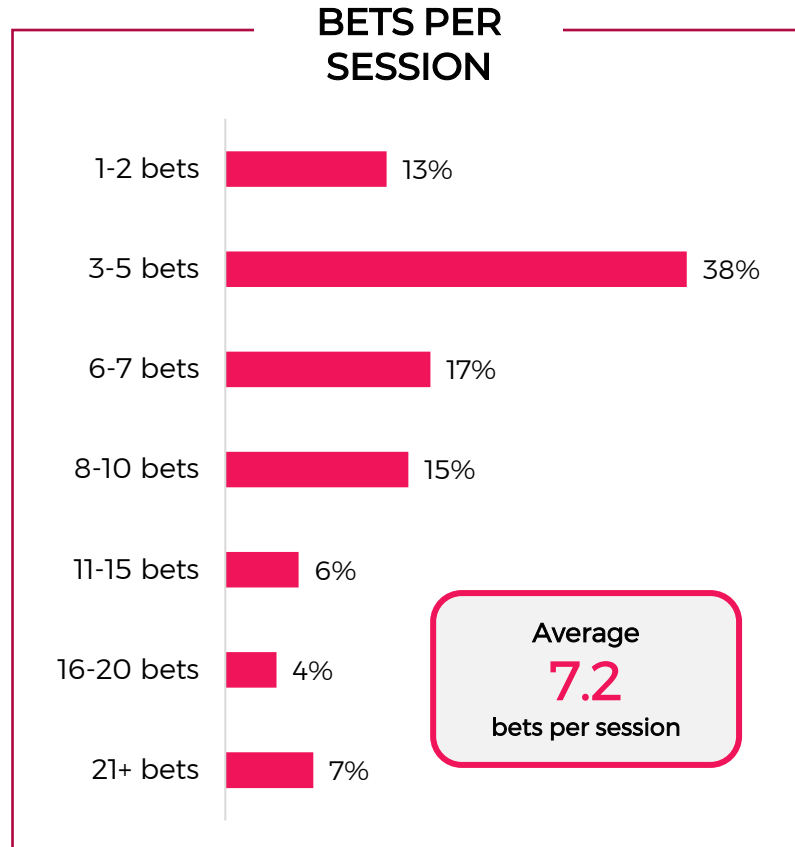
BETTING HABITS | HORSE RACING FANATICS



Q. Which of the following sports have you placed a bet on in the past three months
Q. Approximately how frequently do you bet on horse racing?
Base: Horse Racing Fanatics (n = 300)
Source: Gemba Insights Program - October 2021

The average Horse Racing fan will place seven bets per session, at an average of \$15 per bet

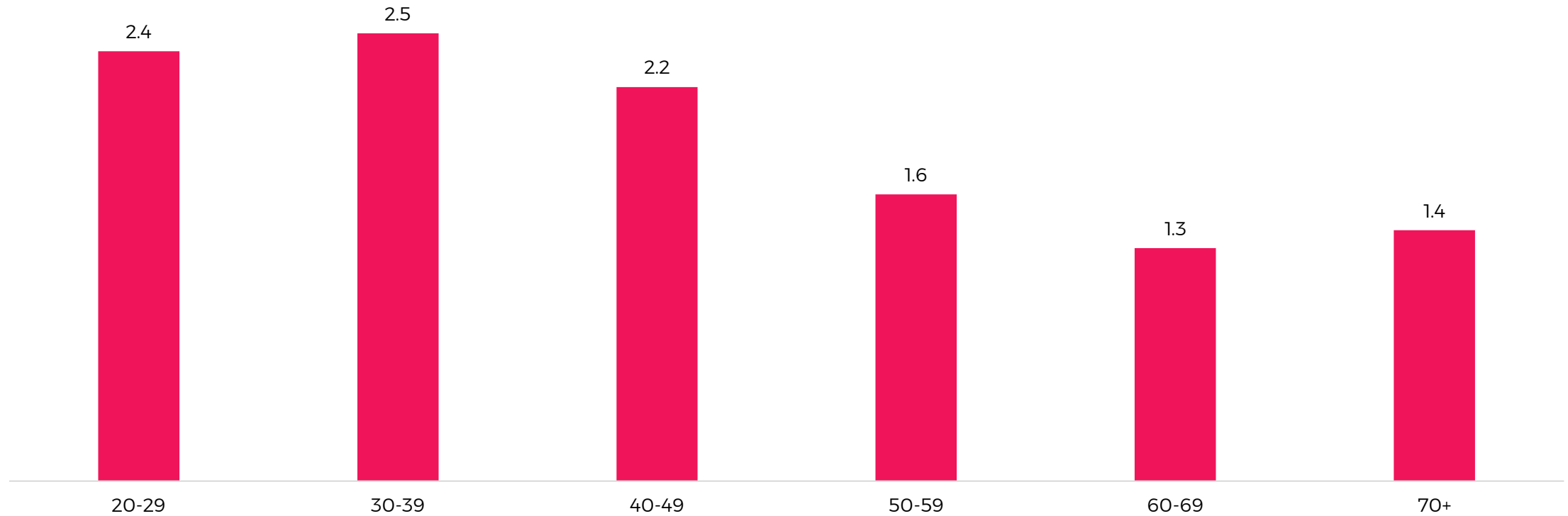
BETTING SPEND | HORSE RACING BETTORS



Note: Weighted averages calculated using the midpoint of each range
 Q. Approximately how many bets would you usually place on horse racing in a single day/session?
 Q. What is the average amount you would usually bet on a single horse race, on average?
 Base: P3M Horse Racing Bettors (n = 167)
 Source: Gemba Insights Program - October 2021

Horse Racing fanatics under the age of 50 are typically using two different betting platforms

AVERAGE NUMBER OF BETTING PLATFORMS USED | HORSE RACING BETTORS



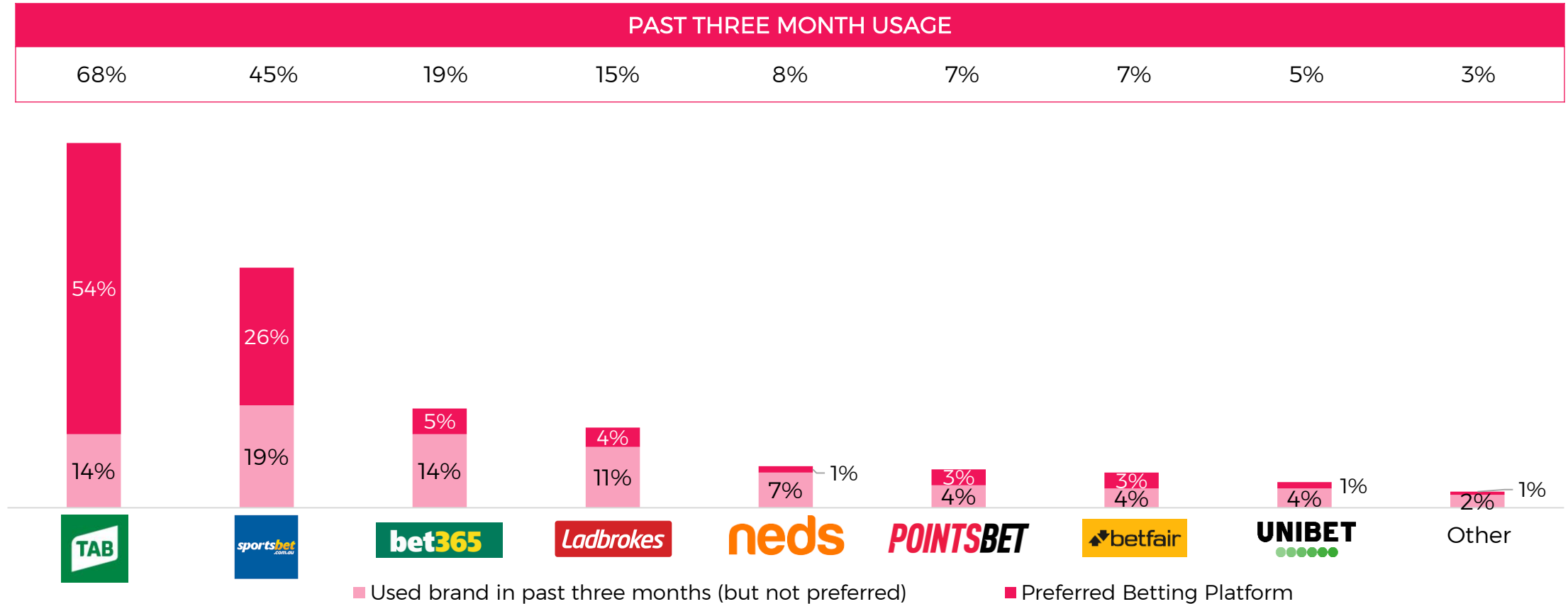
Q. Which of the following betting companies have you used to bet on sport in the past three months?

Base n=167

Source: Gemba Insights Program - October 2021

TAB is by far the popular platform for those betting on Horse Racing

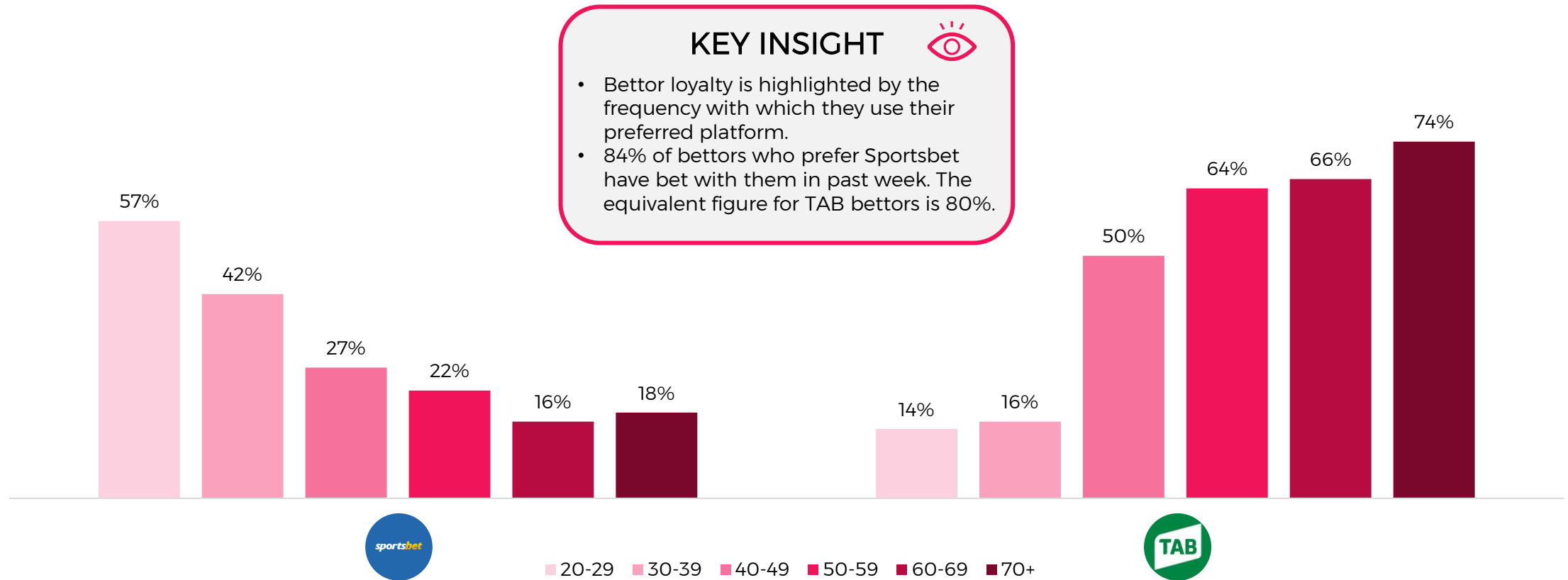
BETTING PLATFORM USAGE | AMONG HORSE RACING BETTORS



Q. Which of the following betting companies have you used to bet on sport in the past three months
 Q. Which of the following is your preferred betting company?
 Base: P3M Horse Racing Bettors (n = 167)
 Source: Gemba Insights Program - October 2021

Sportsbet is the preference of younger Horse Racing bettors while TAB attracts an older demographic

PREFERRED BETTING PLATFORM | BY AGE (HORSE RACING BETTORS)



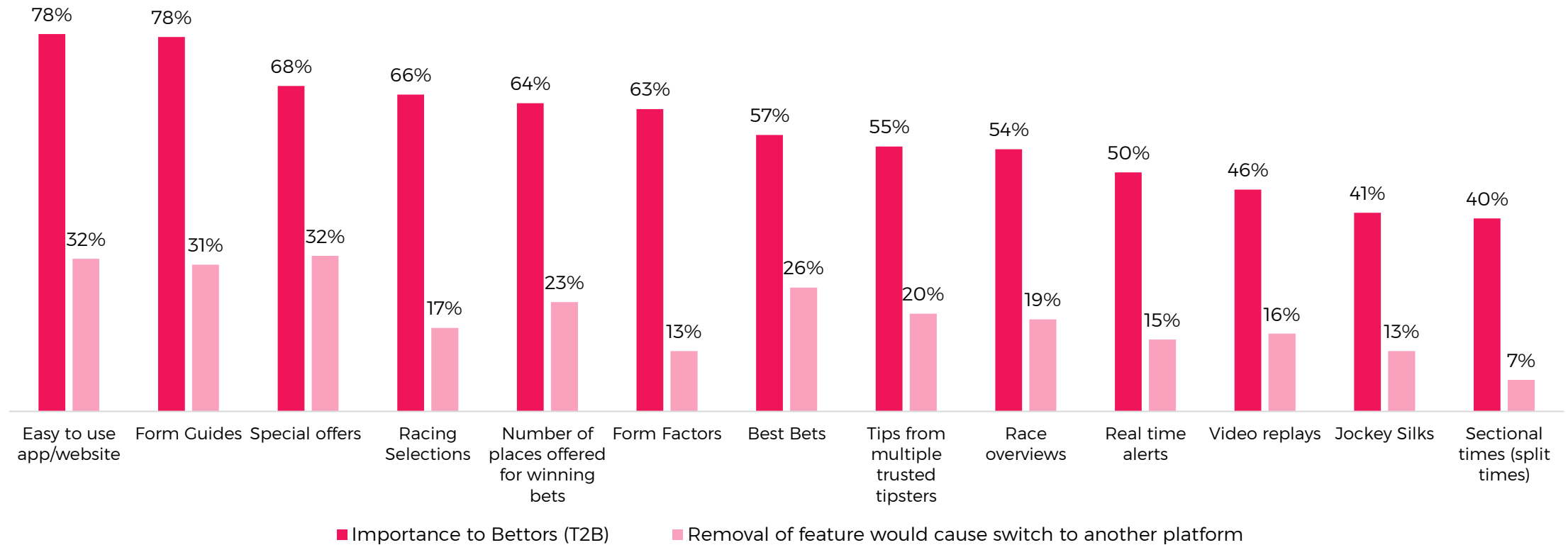
Q. Which of the following is your preferred betting company?

Base (P3M Horse Racing Bettors): TAB Preferred Company (n = 91), Sportsbet Preferred Company (n = 43)

Source: Gemba Insights Program - October 2021

An 'easy to use platform' and the 'quality of form guides' are the two most important feature for those betting on Horse Racing

FEATURES AND INFORMATION | HORSE RACING BETTORS



Q. Using the scale below, how important to you are these features and pieces of information when placing bets on horse racing
 Q. Which of the following features being either removed or reduced would cause you to switch to another betting platform
 Base: P3M Horse Racing Bettors (n = 167)
 Source: Gemba Insights Program - October 2021

Gemba specialises in delivering insights that can inform how Australians engage with the Horse Racing industry

GEMBA'S CORE SERVICE OFFER FOR RIGHTS HOLDERS, BRANDS AND BROADCASTERS

Sport and Entertainment Fan Insights

Understanding how Australians follow and consume in sport and entertainment

Category Insights

Analysing how sports and entertainments fans are consuming goods and services

Bespoke Research Solutions

Providing bespoke research solutions that inform strategic decision making

Sponsorship Effectiveness

Measurement of sponsorship effectiveness for brands and rightsholders

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