

# The path to purchase for Aussie punters: how online wagering companies can break through on digital

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Whether they're hoping to pick a winner at the racetrack or on their team's footy match, Aussies love the thrill of having some skin in the game. Our new research with TNS Australia gives online wagering companies a closer look at punters' preferences and motivations in key moments before they place their bets.

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Each November, millions of mobile screens light up around Australia as 24 Thoroughbreds fill the starting gates at the Melbourne Cup. Inside a packed pub, hundreds of wide-eyed fans scream with excitement, others in anguish, as the horses round the final turn and streak down the home straight. Punters will be the first to tell you that when it comes to predicting outcomes at the race that stops a nation, all bets are off.

Every year, more Aussies choose to place their bets with online wagering companies. However, as [new government legislation](#) phases out online wagering companies' ability to offer promotions and inducements, brands will have to find new ways to attract new customers and retain their existing ones.

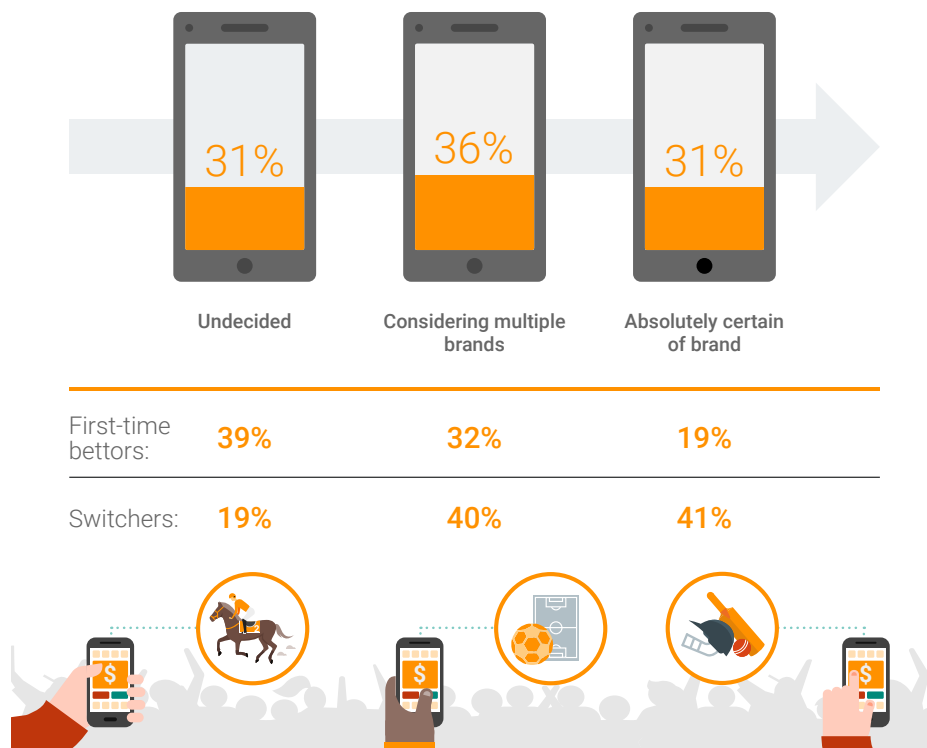
To better understand the research behaviour and motivations of Aussie punters, we partnered with TNS Australia for a quantitative and qualitative study that explores the path to purchase for 500 racing and sports bettors.<sup>1</sup> Here, we break down three key takeaways to help marketers in the online wagering industry win punters' consideration in a shifting landscape.

## 1. Punters aren't a brand-loyal bunch

Interestingly, experienced punters are the least loyal to their current online wagering companies. Current punters tended to have multiple accounts simultaneously, and they often switched one or both during the course of a year. Nearly half (48%) of punters switched online wagering companies in the past year, and 41% discovered a new brand while researching their current one.

Although switchers are more likely to have a brand in mind when signing up for a new account, first-time bettors are largely undecided. Only 19% of first-time punters in our study were absolutely certain of the brand they wanted to sign up with.

**Brand certainty before researching online wagering companies**



Bonuses and promotions were the main reasons punters chose a new brand, but a good reputation and recommendations followed closely behind. Nearly one in four punters (24%) said the lack of a loyalty programme drove them to try a new brand.

“I've signed up to a few sites because of the great sign-up bonuses. I also like to bet when there are specials on because it makes me feel like I'm getting more bang for my buck.”

—Todd P., 30, SA

### **Key takeaway**

Owning multiple accounts shows that punters have relatively few barriers to switching brands. Promotions are a great way to drive new account sign-ups, but as legislation changes and the market matures, online wagering companies will need to focus on retention through great customer service, detailed product features, and brand engagement.

## **2. A mobile-friendly user experience is crucial**

While online wagering companies used to be able to offer incentives and free bets to attract new customers, recent legislation has largely removed that ability. Now, a friction-free user experience is the best way for online wagering companies to ensure they're considered.

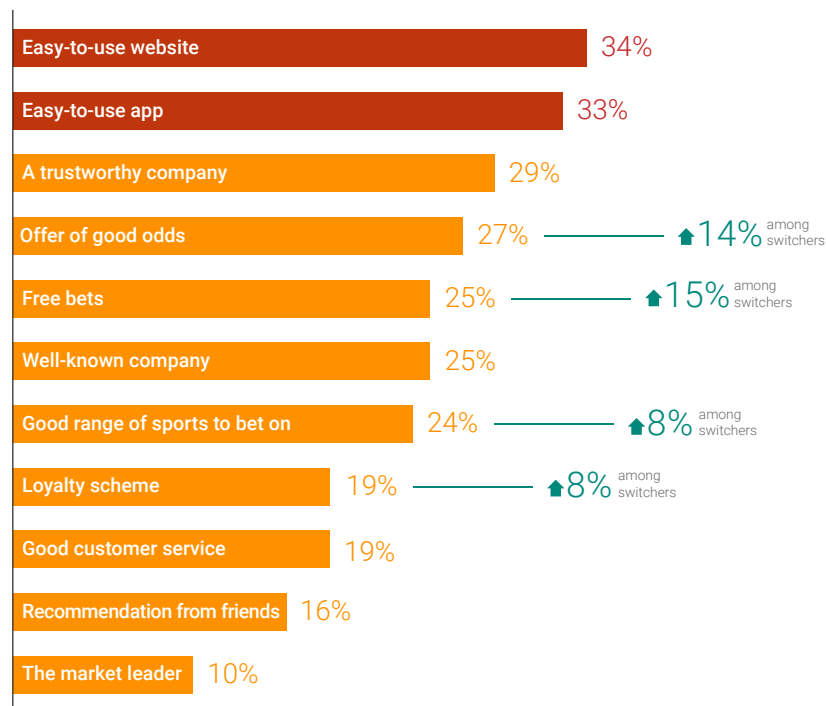
That's because unlike other verticals in our research, a large amount of betting research takes place minutes before registering, and 11% of consumers don't conduct any research at all. Punters expect to easily and immediately find the information they're looking for, and they won't hesitate to try another brand if an online wagering company's site or app is too slow or difficult to navigate.

“To me, the perfect betting interface would be intuitive or custom-designed to my betting habits. It would understand how I bet and have my recently searched or most popular sports and races on its home page.”

—Kevin L., 22, NSW.

Our study showed that an easy-to-use website or app was punters’ main reason for trying a new brand, and 24% said an unreliable website would keep them from signing up with a new brand.

#### Top reasons why punters tried a new brand



## Key takeaway

An online wagering company's website is typically the first place punters go to research a new brand, so first impressions are everything. Brands should feature essential information—including odds, terms and fees, available markets, and pending bets and balances—prominently on the home page, and make betting and signing up for an account as simple as possible.

A secure, reliable, and easy-to-use app or mobile website also heightens the user experience for mobile punters. Pin codes and finger recognition are attractive features for added security, and a sleek, smooth-scrolling interface makes it easier for punters to compare odds and available markets for betting.

## 3. Online video is an increasingly valuable resource

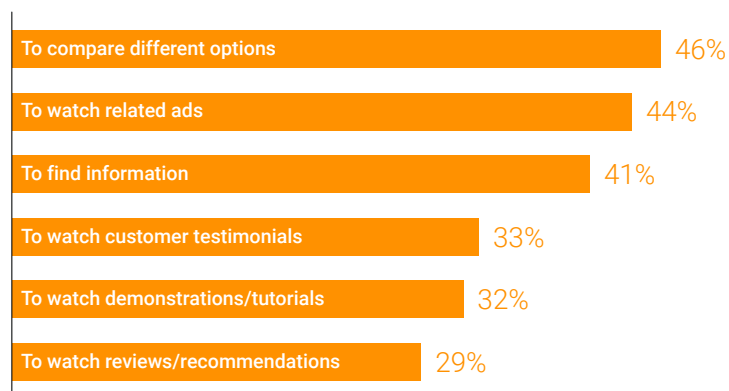
Compared to other groups of consumers we've studied, punters are some of the most likely to use online video as a research tool. Of those who used online video at some point on the path to purchase, 71% said they would watch videos in the future for information about the latest promotions or how to register and place a bet.

The top reasons punters said they used online video were to compare online wagering brands, watch related ads and customer testimonials, and watch demonstrations and tutorials.

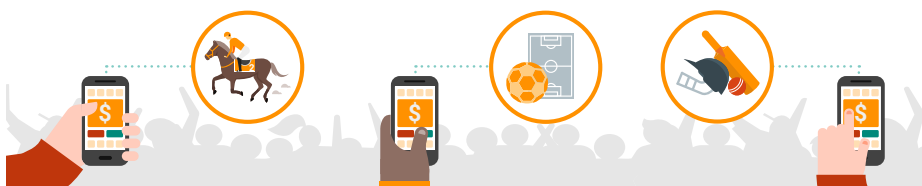
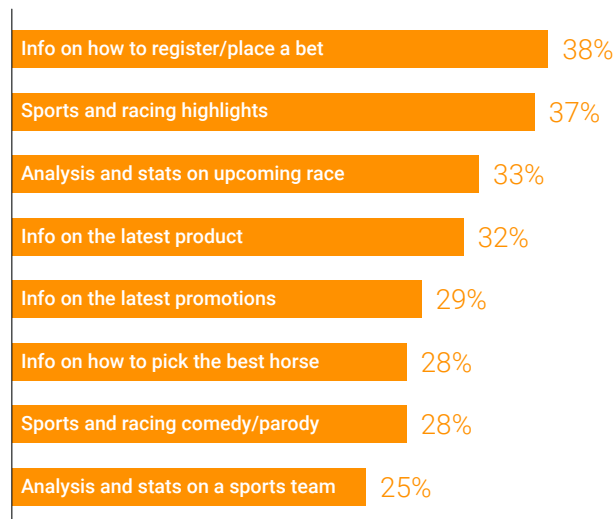


## Punters who use online video during research

### Top reasons for watching



### Most commonly watched videos



Our research also revealed that online video plays a big role in boosting brand awareness and spurring action. Sixty-five percent of punters said that online video introduced them to a brand they hadn't previously considered, 77% said online videos convinced them to feel more positively about a brand, and 25% signed up for a new account after watching an online video.

## Key takeaway

There's a growing appetite for online video among punters, and the availability of sports content online is growing exponentially as major leagues turn to digital to reach new audiences. That means now is the best time to start developing entertaining and informative video content. Using in-stream ads to promote exciting markets or offer quick betting tutorials is a great way to capture punters' attention when they go online to watch games and highlights and read analysis.

## Get ahead of the curve to win over punters

Betting is all about winning, and that's no different for marketers in the industry. When Aussies pick up their smartphones to place a bet, online wagering companies only have minutes—sometimes seconds—to be considered. To capture new customers and retain existing ones, it's important for brands to provide a fast, relevant, and seamless experience on their apps and websites and to set themselves apart through relevant marketing and product differentiation.

### **Methodology**

*Google partnered with TNS Australia to conduct quantitative and qualitative research to explore the path to purchase for sports bettors (where consumers look for information, where they purchase, their brand loyalty, etc.).*

*We spoke to 500 Australian consumers aged 18–60 years old who registered a new account to place racing or sports bets in the past 12 months prior to the survey.*

## Source

- 1 Google/TNS, "Path to Purchase Research—Sports Betting" March 2017, Australia, n=500 Australian consumers aged 18–60 who have opened or registered a new account to place racing or sports bets in the past 12 months.