Ipsos MORI

Interim Synthesis Report

Executive Summary

The effect of gambling marketing and advertising on children, young people and vulnerable adults

Written by Ipsos MORI on behalf of GambleAware

1 Executive Summary

1.1 Background and method

In March 2018, GambleAware commissioned two independent consortia to assess the extent, nature and impact of gambling marketing and advertising on children, young people and vulnerable groups in the UK. The first consortium was led by Ipsos MORI (in partnership with University of Bristol, University of Edinburgh, Ebiquity and the Centre for Analysis of Social Media at Demos), and the second by the University of Stirling (in partnership with ScotCen Social Research, University of Glasgow, and University of Warwick). Each consortium looked at the broad spectrum of gambling marketing and advertising, using different research methods (see Table 1.1). Separate consortium reports have been prepared to give more detail on the work each consortia led and methods used. These separate reports will be published online later in the year.

Ipsos MORI have written this interim synthesis report, which explores exposure, tone and format of gambling related marketing and advertising. It draws on data from all strands minus the survey of children and young people and collection of 'click-through data' (strands 7 and 10). The results from these strands will be available in due course and will form part of the final, full synthesis report which will report on the impact of gambling advertising. The key findings, conclusions and recommendations synthesised in this report represent the views of Ipsos MORI, and do not necessarily represent the views of all the authors who contributed to the research study.

The key objectives of the research were:

1. To explore whether and how gambling marketing and advertising influences children, young people and vulnerable adults' attitudes towards gambling.

2. To examine the tone and content of gambling marketing and advertising across all media, including social media, and to explore the potential impact of these on children, young people and vulnerable adults.

3. To identify specific themes and features of gambling advertising that children, young people and vulnerable adults are particularly susceptible to.

For the purposes of this research children and young people were those aged 11 to 24, and vulnerable adults were defined as people living in constrained economic circumstances, people with limited capacity to understand information, people already experiencing problems with gambling, and people with experience of mental health problems.

The research objectives were explored through a multidisciplinary approach. In total there were 10 strands to the research; a summary of which is provided in the table below. A more detailed overview is provided in section 1.5 of this document; full detail is provided within the main report.

Table 1.1: Research strands

Strands	Organisation/(s) responsible	Strand aims
Strand 1 - literature review	University of Stirling	To add context to the study as a whole by reviewing literature from 2013 -2018 identified using pre-specified search terms.
Strand 2 – media Monitoring	Ebiquity Ipsos MORI	To assess volume, frequency and estimated spend associated with traditional gambling-related advertising in the UK from 2015-2018.
Strand 3 – online avatars	Ebiquity Ipsos MORI	To assess volume and frequency of paid-for gambling-related advertising online, including an assessment of whether behavioural targeting is used within the gambling industry, and to explore the likelihood of exposure of children, young people and vulnerable groups.
Strand 4 - social media analysis	Demos Ipsos MORI	To assess volume and frequency of gambling-related advertising and marketing on Twitter. This includes bespoke age-based analysis to assess the extent to which children and young people are part of this online conversation.
Strand 5 - content analysis	University of Stirling University of Bristol	To provide an in-depth analysis of the tone, format and content of gambling-related advertising across a wide range of media both on and offline.
Strand 6 – review of sport sponsorship	University of Stirling	To examine the frequency and nature of gambling references during television and radio broadcasts of sport in the UK.
Strand 7 – quantitative survey of children and young people	ScotCen Social Research	To provide a nationally representative measure of exposure to and impact of gambling-related advertising among children and young people.
Strand 8 – qualitative research with children and young people Strand 9 – qualitative research with vulnerable people	Ipsos MORI ScotCen Social Research	A combination of focus groups and in-depth interviews to provide a more nuanced understanding of exposure to gambling-related advertising in the context of attitudes, behaviours and circumstances – including frequency of exposure, which tone/format is most engaging, and the potential impact (both immediate and over time).
Strand 10 – analysis of 'click-through data'	Ipsos MORI	Collection and aggregation of industry click-through data to ascertain conversion rate and engagement within online gambling-related advertising.

1.2   Exposure to gambling advertising and marketing

1.2.1   Volume of advertising and marketing

There has been a clear increase in the volume of, and spend on, gambling advertising in recent years. Across all media, with the exception of online advertising for which there is limited trend data available, the estimated spend of gambling 'paid for' advertising has steadily increased year on year from £264,657,325 in 2015 to £328,945,916 in 2018. This represents a 24% increase from 2015 to 2018.

Although there are signs that this is cooling in some sectors and channels[1] it is also apparent that the adverts captured as part of this study are likely to be an underestimate. The spend estimate excludes marketing that is more difficult to capture, such as window adverts in gambling premises, scratchcard or lottery facilities at the point of sale in shops, as well as sponsorship of sports teams and leagues, and within sports live TV coverage.

Sport is an important context in which exposure to gambling advertising is likely to occur. This was demonstrated by: i) spikes in spend on gambling advertising within traditional media, and spikes in social media activity across key sporting events (such as Cheltenham Gold Cup and the World Cup), ii) by the compounded rate of exposure to sponsorship whilst watching some live sporting events on TV, and iii) by the prevalence of sports/event betting as the most common form of online advertising within the online avatars' research. However, this association was not universal across all sports – for example, the sports sponsorship analysis found very few references to gambling within live broadcasting of rugby and tennis sample matches, and no references within Formula 1.

Yet, outside of advertising online, sports and event betting has a smaller profile than the advertising of lotteries. Lotteries (including the National Lottery, Postcode Lottery, Health Lottery) were identified as the biggest spenders on advertising across TV, radio, cinema, direct mail, door drops and outdoor media.

The research also identified the rise of advertising of new forms of gambling, in particular eSports[2]. The Centre for Analysis of Social Media at Demos identified 44 accounts which posted a total of 26,573 Tweets relating to gambling in eSports across 2018. Further research is required to establish how many of these accounts are licenced gambling operators, and to establish the context in which people are engaging with this content. Nonetheless, Demos estimated that at least 9,000 people in the UK follow at least one of these accounts.

1.2.2   Exposure of children, young people and vulnerable adults

Within the data captured, the research found no examples of gambling adverts being placed within children's media, including the most popular children's websites. For example, there were no examples of adverts appearing in children's magazines, or on popular children's websites. Moreover, the most prominent placement of gambling adverts was found on sites such as Oddschecker, sites used by regular gamblers, which are unlikely to be visited by children. Findings from the avatar research did find one example of a sophisticated strategy to target a profile with the traits of a 'Young Person Gambler'; however, it was not clear whether this strategy targeted traits related to gambling or traits related to being a young person.

Nonetheless, an absence of direct targeting did not prohibit exposure to gambling marketing and advertising. Children, young people and vulnerable adults reported what they believed to be high levels of exposure, and spoke of the ubiquitous nature of gambling advertising, across multiple formats, and at different times of the day. Qualitative research identified TV, social media and the high street as the main sources of self-reported exposure to gambling advertising (the quantification of which will be explored in a forthcoming survey, and will feed into the second synthesis report which will be published in due course). Exposure on TV was not restricted to the viewing of live sports matches. Participants also shared examples of gambling advertising while watching other genres on demand/catch up, and the sponsorship of daytime TV programmes. Exposure on social media was most likely to be in the form of video adverts while watching clips

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[1] For example in a separate study the ASA found that exposure to children on TV had decreased since 2013: https://www.asa.org.uk/resource/children-s-exposure-to-age-restricted-tv-ads.html
[2] eSports are multiplayer video games played competitively for spectators, typically by professional gamers.

on YouTube or ads appearing while scrolling through Facebook feeds, with a small number reporting following gambling accounts. Exposure to gambling advertising was also frequently noted in betting premises on the high streets, along with promotional window displays, as well as displays for scratchcards and lotteries within other shop windows, shop floors and near tills. The presence of gambling advertising throughout the day was further evident in the data collected across TV, radio and Twitter.

There is clear evidence of children following and engaging with betting related accounts on Twitter. Using an age classifier, it was estimated that 41,000 UK followers of gambling related accounts are likely to be under 16, and that children make up 6% of followers of 'traditional' gambling related accounts - this rises to 17% of accounts focused on eSports gambling. The research also found 13,000 replies to and retweets of gambling content sent from accounts believed to belong to children in the UK.[3]

Though exposure to advertising didn't always translate into engagement, there is likely to be wider impact. Many participants claimed to be good at ignoring gambling advertising content (particularly those under 18, who felt it wasn't relevant to them); however, the strong performance of all participant groups in the brand recognition task conducted by ScotCen is evidence of the role of exposure in building awareness of gambling and of gambling brands. Participants were often surprised at how well they performed in the task.

However, advertising isn't the only route of exposure to gambling brands and gambling activity. Participants across the qualitative strands noted the role of family and friends in introducing them to gambling, often at a young age, and in informal settings. This included picking numbers for the lottery, selecting horses for the Grand National, playing arcade games, and playing bingo on holiday or at school fundraising events. As such, awareness of the different types of gambling activity and brands was closely linked to the attitudes and behaviour of family and friends.

Messages of risk and messages to gamble responsibly received mixed levels of understanding. The majority of children and young people felt that in theory, gambling could be enjoyable; however, their understanding of risk varied. They often described risk in overly simplistic terms with some confusion about the chance of winning. Without prompting, there were calls from participants across all groups to better highlight the risks of gambling.

The research identified two possible ways to further mitigate the risk of exposure to gambling advertising among children and young people. Firstly, in response to evidence that children under 16 are actively engaging in gambling material on Twitter, more could be done to work closely with social media platforms to make better use of age screening tools before individuals are allowed to follow accounts that promote gambling. Secondly, betting operators and advertisers could make better use of adtech to positively exclude online browsing profiles that present themselves as being very likely to be a child. Within the avatar research, there was no evidence to suggest that steps had been taken to restrict exposure to gambling advertising of vulnerable adults and children based on their known browsing history.

It is too early to judge the impact of exposure to gambling advertising and marketing on children, young people and vulnerable adults within this Interim Synthesis report. The qualitative research suggested that impact should be considered in broader terms than whether or not someone is prompted to gamble upon seeing an advert. For example, exposure to the sheer volume of gambling advertising and marketing led to some normalisation of gambling and, on occasion, legitimisation among participants. However, these emerging findings need to be assessed alongside findings from the forthcoming survey research to consider the role of other factors in influencing gambling attitudes and behaviours. These more complex relationships between advertising and emotions, as well as beliefs and attitudes towards gambling will be explored further in the Full Synthesis report.

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[3] It is important to note that analysis has not been restricted to analysis of licences accounts in Great Britain. Some of these accounts therefore may fall out of scope of existing regulation in GB where they are not based in GB and are not directly targeting a GB audience – this is particularly the case within the eSports dataset. Though there is clearly engagement from British users within this dataset, further work is required to explore how and why people are engaging with this content.

1.3 Themes and features

1.3.1 Identification of themes and features

The content analysis demonstrated the wide variety of themes and features used to market gambling. This included adverts with no specific gambling reference; this was particularly the case on social media where 'content marketing' was widely used to build brand loyalty rather than prompt a specific gamble (for example debating the best players in the league). Within those ads designed to elicit an immediate customer response (i.e. to place a bet), common features included time-limited offers, promotion of specific odds, free or matched bets, details of price offers and bonuses, new customer offers, and minimized risk (such as money back in free bets). A wide range of topical associations were also used to promote gambling and gambling brands, the most prominent of which was sport; this was often comprised of specific bets linked to real world events, teams or organisations, or broader discussion of topical sporting debates. Other common features included the use of humour (especially within 'content marketing') and celebrity endorsement. It was less common to advertise jackpots and potential prizes, or feature previous winners or testimonials.

The literature review and qualitative research identified a wide range of themes and features of gambling advertising that attracted the attention of children, young people and vulnerable adults. These features were wider than the use of visual images and colours that might traditionally elicit appeal, or reference to specific child friendly terms; they also included reference to the framing of the gamble, such as emphasis on fun or financial offers. In alphabetical order, themes and features that attracted the attention of participants from the qualitative research included:

- **Celebrity endorsement:** was thought to appeal to and attract the celebrity's fans and more widely perceived to make the promotion more authentic, trustworthy and memorable. The choice of celebrity dictated the appeal of the advert; examples of appeal to children and young people included use of sports stars.

- **Characters:** participants also remembered the characters that were used in marketing campaigns and adverts and suggested that appeal would be tied closely to the character's features. Examples included adverts from Foxy Bingo, Paddy Power, Ladbrokes, Gala Bingo and the National Lottery.

- **Colour:** participants in all categories were more attracted to gambling advertising that used bright and engaging colours. This transcended TV, social media, billboards and window displays. Younger participants felt that the use of colour could be particularly appealing to younger children.

- **Fun:** participants were attracted to advertising which reinforced the fun element of participating in gambling with low risks, or presented taking part as harmless or light hearted.

- **Glamour:** younger participants were more likely to identify with content with perceived high production value that often appeared dramatic, akin to a film. Participants also noticed ads that associated gambling with a glamorous lifestyle, such as dreaming of a big win and using winnings to treat yourself, friends or family.

- **Humour:** marketing that used humour appealed to all participant groups, and was perceived potentially to have universal appeal to all children and adults. Even where there was no specific call to action to place a bet, participants reported that humorous ads aided recall, made gambling seem less serious and therefore more acceptable.

- **Memorable songs and catchphrases:** thought by all participant groups to aid recall of the ad and brand. Participants broadly felt that catchy songs were particularly attractive to young people, some of whom would hum or sing along inadvertently.

- **Offers:** this included promotion of free bets or spins, deals and boosts in odds. Reduced risks through money back guarantees were also attractive. There was evidence of the latter being particularly appealing to low frequency gamblers or those who hadn't gambled before (including children and young people), and vulnerable adults with financial difficulties.

- **'People like me':** in addition to presenting winners from members of the public, participants were also attracted to adverts that used other features to appear personalised or that gave the reader a sense of ownership. Moreover, social media content that had been shared or liked by friends was assumed to be more relevant and therefore more appealing.

- **Skill:** ads that used features such as odds boosts or referenced accumulators were seen as particularly attractive to high risk or frequent gamblers. This was apparent in the ads shared by these groups, which appealed to a sense of expertise and knowledge, or sense of community based on a perception of 'skill'.

- **Winners:** showcasing previous winners was seen to add authenticity, encouraging others to try and replicate success. Vulnerable adults in financial difficulty reported that they felt they were particularly susceptible to these features.

'Appeal' among children and young people cannot therefore be simply defined as binary. To date, definitions of 'particular appeal' have largely focused on the images or language used in ads, and considered the extent to which they could be seen as child-friendly to the point that they would have more appeal to children and young people than they would to adults. The qualitative research identified some instances of this kind of appeal, including the use of music, colours, characters and celebrities that will have an obvious appeal to children and young people or the presentation of insider knowledge/skill (which was more appealing to high risk gamblers). However, it also demonstrated that children and young people are attracted to other features that are not unique to them: for example, the use of humour, financial incentives, and the presentation of winners all appealed. Moreover, gambling advertising in sport is a clear example of a category that can appeal to a wide audience (for example in the use of sports stars), including children and young people.

Beyond appeal (i.e. the extent to which an advert attracts attention) it is also important to consider potential susceptibility of children, young people and vulnerable adults to the themes and features used in gambling advertising. The content analysis identified three areas of wider concern in this regard: i) difficulty of distinguishing advertising from general content on Twitter, and the extent to which children and young people will be able to identify which content is designed to influence their attitudes and behaviours in favour of gambling; ii) a lack of emphasis on the risks of gambling and of messages of responsible gambling; and iii) the lack of ability in children, young people and vulnerable adults to understand the risks involved in cases with complex terms and conditions or where reduced risk or free bets/spins are promoted.

1.3.2 Prevalence of themes and features

The University of Stirling and University of Bristol led two independent pieces of content analysis to explore the content, tone and format of gambling advertising through traditional media and on Twitter respectively. It should be noted that the analysis does not take account of where the advert was placed, but is a discrete analysis of the contents of the advert itself.

There was some evidence of content or features that could appeal directly to children and young people. Within the content analysis of traditional media conducted by University of Stirling, there were three features that could appeal directly to children and young people: i) language (e.g. 'Starburst', 'House Party'); ii) graphic design (e.g. cartoon-like, colourful); and iii) narratives such as fun, excitement, or 'non-stop' playing. At least one of these features was identified in 11% of creatives. Using a similar distinction, researchers at University of Bristol found a higher prevalence within the Twitter content analysis, where 21% of Traditional Betting Tweets, 59% of eSports Betting Tweets, and 37% of eSports Content Marketing Tweets were judged to contain features that could plausibly appeal directly to children and young people, largely accounted for by the use of images and animations. Examples of this included cartoon or animated style graphics, and features such as popcorn, lucky charms and unicorns, and game-like avatars.

Enticing financial offers are a common feature of gambling advertising, and are likely to attract the attention of some children, young people and vulnerable adults. The most prevalent of these offers was reference to a 'free' or 'matched' bet, which was contained within 44% of the traditional media content analysis, and 47% of the Twitter content analysis.

Other examples include price offers and bonuses, means of minimising risks (for example money back offers), and offers available only to new customers.

There is some evidence of encouraging frequent gambling or creating a sense of urgency. The most prominent feature of this was the use of time limited gambles or offers, often driven by reference to a specific sporting event taking place immediately which may be interpreted as creating a sense of immediacy or urgency, encouraging instant action by the consumer. This issue was compounded within the eSports analysis by the fact that many of the global events promoted take place late at night in the UK.

Some ads may exploit the susceptibility of children, young people and vulnerable adults. Given the mixed and often limited understanding of risk identified among participants in the qualitative research, the content analysis pointed to a number of features of gambling advertising that may exploit the susceptibilities, aspirations, credulities, inexperience, or lack of knowledge of children, young people and vulnerable adults. These included implying limited risk, the overly complicated or potentially misleading presentation of gambles or offers, inflated suggestions of winning, suggesting that gambling was simple, or that the company provided a safeguard to losses. In total 22% of ads within the traditional media content analysis were found to contain at least one of these features; this rose to 37% of adverts within the Twitter dataset using a similar definition.

There was little evidence of prominent consumer protection messages that might help raise awareness of the risks of gambling. The presentation of age warnings, promotion of lower-risk gambling, or of terms and conditions was judged to be poor in both traditional media and Twitter datasets.

1.4 Recommendations

Based on the context of these findings, Ipsos MORI has identified 12 recommendations that warrant further consideration among industry, regulators and researchers. Further recommendations relating to impact and exposure will be considered within the Full Synthesis Report.

1.4.1 Recommendations for gambling, advertising and tech industry

1. **Explore making better use of technology to minimise the risk of exposure of gambling advertising content to children, young people and vulnerable adults.** This could include using adtech to positively exclude certain online profiles from seeing gambling ads (including those with child-like persona and those who have sought help for problem gambling), and working with platforms such as Twitter to make use of features that allow better age verification for account followers.

2. **Integrate more explicit and more frequent references to risk and responsible gambling within advertising and consider the visibility of warnings within advertising content.** This signposting could include dedicating more visual presence to messages about responsible gambling within current ads; increasing the clarity of risk where it is likely some groups may misunderstand financial incentives; being cautious not to over-emphasise elements of fun and enjoyment; and ensuring that clear age restrictions are evident where appropriate.

1.4.2 Recommendations for policy and regulation

3. **Establish where issues identified within the research are due to poor compliance with existing regulations and guidelines, or where there may be a need for further guidance from regulators, or new regulations.** Regulatory issues identified for attention include the use of individuals under 25 in gambling adverts, labelling of ads on social media, the prominence of consumer protection messages, and determining whether financial incentives are presented clearly enough for users to understand, so that they don't exploit credulity or lack of understanding among children, young people and vulnerable adults.

4. **Consider whether 'particular appeal' remains a useful tool as the main criterion for protecting children and young people from the potentially harmful impacts of gambling advertising, given that more general content may appeal**

to those groups too. Regulators could consider the extent to which features beyond child-friendly images and language are likely to also generate significant interest among these groups – even if they are not the intended target audience – and how best to accommodate this alongside other aspects of the ad, such as likely exposure.

5. **Ensure that existing regulation and codes of practice are applied to the licensed eSports betting market as it develops** Where eSports betting operators are licensed within Great Britain, care must be taken to ensure that existing regulations and best practices are followed, especially concerning the use of child-friendly images and inclusion of individuals under 25.

6. **Maintain careful oversight over unlicensed operators online, particularly in relation to eSports.** The unlicensed remote eSports betting market requires close scrutiny to ensure that it is not contravening British law by allowing consumers in Great Britain to access its gambling facilities. This is particularly important as the research found evidence of children being exposed to, and interacting with, Twitter accounts advertising unlicensed eSports betting. The regulator should maintain a robust approach in deterring and combating unlawful gambling activities.

7. **Consider the potential role and value of education initiatives.** Many participants reported exposure to gambling activity often in informal settings at a young age, and encouraged by family and friends. Moreover, understanding of gambling risk amongst children, young people and vulnerable adults was mixed. Education initiatives therefore could include content for both parents and young people to promote a better understanding of gambling-related harms and risks, and of odds and financial offers stated in marketing. This could also raise awareness of the potential impact of content marketing techniques designed to build brand loyalty and awareness.

1.4.3 Recommendations for research

8. **Establish a longitudinal research project that would allow for a more robust assessment of the impact of advertising on children, young people and vulnerable adults.** This could include a young cohort that would enter adulthood (and legal age to gamble) during the lifecycle of the project to better understand the long term impact of exposure to young people who are less likely to be able to act immediately on their early exposure.

9. **Establish greater context against which the volume of gambling advertising in the UK, and likely exposure to children, young people and vulnerable adults, can be judged.** The media monitoring work currently lacks comparisons to other sectors (such as alcohol), and to other countries. This will help assess for example whether the trends experienced in the UK are similar or unique compared to others, and whether any media channels or gambling sub-sectors are more or less prevalent compared to other regulatory frameworks.

10. **Improve understanding of exposure to online advertising, including social media.** This could include integrating purchase behaviour as part of avatar online profile (not just browsing behaviour and search queries) to establish whether this is likely to generate a greater level of gambling ad exposure. Moreover, the current avatars research excludes social media advertising – this was a key source of exposure among participants within the qualitative strand of research.

11. **Explore prevalence of other forms of less featured advertising, including in-app adverts, and notifications.** Current media monitoring does not capture new mobile forms of advertising; furthermore, these forms of advertising were not mentioned spontaneously by participants in the qualitative research. Further research is required to better understand the themes, features, appeal and prevalence of this form of advertising.

12. **Improve understanding of engagement with eSports advertising on social media.** Further work is required to better understand how and why people are engaging with this content, and the prevalence and penetration of gambling related content within the wider eSports community.

1.5 Summary of methodology

A project of this complexity requires a multidisciplinary approach. This included a quantitative assessment of the volume and frequency of gambling-related advertising, in its many forms, and a measure of exposure to advertising among children, young people and other vulnerable groups. It also included detailed content analysis of the features of advertising and marketing, and the use of qualitative and quantitative techniques, to explore the potential impact this advertising and marketing has on the attitudes and behaviours of children, young people and other vulnerable groups.

To meet the objectives of this research, this project had 10 strands, an outline of these is given below. A more detailed outline of each of these strands is provided as an appendix to the report[4].

1.5.1 Strand 1 - literature review

This literature review was led by the University of Stirling, with the aim of providing an overview of the most relevant literature on gambling advertising in relation to children, young people and vulnerable groups. This review built on Binde's work (2014[5]) by exploring research on gambling marketing from between 2013 and 2018. The review included primary research that related to the study research objectives in the English language, and included any research design, for example, quantitative or qualitative. Findings from the literature review have been published in Current Addiction Reports[6].

1.5.2 Strand 2 - media monitoring

This strand of the research acted as an exploratory exercise with the aim of identifying where and how often gambling advertising occurs and how much is spent across a variety of media types including press, radio and television. Ipsos MORI conducted this research using Ebiquity's in house advertising database, Portfolio. Portfolio is an advertising research platform, which links advertisements to their placement in the media and the standard spend rate for these advertisements. This data was then crossed with other variables such as region, type of advert, brand and type of gambling.

Analysis consisted of two parts: an overall sector-level analysis of gambling advertising from 2015-2018, as well as a more in-depth analysis (by sub-sector and media type) of the data available from October 2017 to September 2018.

1.5.3 Strand 3 – online avatars

Led by Ebiquity and Ipsos MORI, this provided an assessment of the volume and frequency of paid-for gambling-related advertising online. To achieve this, an 'avatar panel' was generated which consisted of various 'personalities' including children and vulnerable groups. To do this, Ebiquity employed a method known as 'Audience Panel Simulation': this generates users that are referred to as avatars. Each of these avatars had a specific personality. These personalities were developed through normal browsing activity, akin to the behaviours of a real online user. In total, for this research, 11 avatars were generated, which included a child under 13, an adult with a gambling problem and a child under 18 who was a sports fan.

After the avatars had been generated, they were then put 'into field', meaning that they were sent to various websites online and were able to record each of the adverts that they saw. The avatars were in field for 34 days (12 September – 15 October 2018), and visited 150 sites every day. These sites included the top 100 sites, top 20 children's sites, top 20 sports sites, four gambling help sites, two debt finance product sites and four other help sites for vulnerable audiences.

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[4] This does not include strands 7 and 10 as at the time of writing these had not been completed. The data from these will be included in the full synthesis report.

[5] Binde P. 2014. Gambling advertising: A critical research review. 2014.

[6] Newall PWS, Moodie C, Reith G, Stead M, Critchlow N, Morgan A & Dobbie F (2019) Gambling marketing from 2014 to 2018: A literature review (Forthcoming/Available Online) [Gambling marketing: A literature review]. Current Addiction Reports. https://doi.org/10.1007/s40429-019-00239-1

1.5.4   Strand 4 - social media analysis

Led by Demos and Ipsos MORI, this provided an assessment of the volume and frequency of advertising and marketing on social media related to gambling. This included basic analysis of available Facebook data, and more extensive analysis of Twitter data. Within the Twitter analysis, this further included bespoke age-base analysis to assess the extent to which children and young people were part of this ecosystem. In order to achieve this, Demos collected and analysed: i) 888,000 Tweets sent from 417 gambling related accounts over a 9-month period in 2018; ii) details of the 825,000 followers of these accounts located within the UK; and iii) a total of 1.6 million Tweets sent from the UK which mentioned one of the 417 gambling related accounts by name. To investigate this large dataset, researchers trained a series of algorithmic classifiers to determine, for example, whether a given Tweet mentioned a specific bet, or to estimate the rough age of a follower.

1.5.5   Strand 5 - content analysis

Two content analyses were conducted, one led by the University of Stirling and one led by the University of Bristol. Together they provide an in-depth analysis of the tone, format and content of gambling-related advertising across all types of media and consider to what extent (if at all) the content may reach and appeal to children, young people and vulnerable groups. The content analysis codebook used to categorise adverts covered six main areas: i) descriptive information; ii) design features; iii) content in detail; iv) consumer protection information; v) information about the gamble; and vi) messages about gambling behaviour and outcomes.

The University of Stirling carried out a **full media deep dive** content analysis of paid-for gambling advertising in traditional media. A random sample of 300 creatives were selected from across 5-11 March 2018 and 12-18 March 2018, with adverts drawn from Ebiquity's media monitoring data. These dates were chosen to reflect a week of high intensity (based on advertising expenditure data) and an adjacent week of average intensity. 45 brands were represented in the sample and there was a stratified sample of: 224 x print press; 27 x internet; 22 x TV; 11 x radio; and 16 x email, direct mail, door drops, outdoor.

The **Twitter deep dive** content analysis was led by the University of Bristol. The data from this was solely from Twitter and made up of four samples: 241 advertising Tweets from bookmakers and tipsters; 181 advertising Tweets from eSports operators advertising from accounts run by organisations and individuals involved in eSports gambling; 191 content marketing Tweets from bookmakers and tipsters; and 190 content marketing Tweets from eSports.[7]

1.5.6   Strand 6 – review of sport sponsorship

The University of Stirling carried out analysis of the frequency and nature of gambling references in televised and radio broadcasts of professional sporting events in the UK. The sample was made up of 10 professional sporting events, recorded as broadcast in the UK on public service (e.g. BBC) and commercial broadcasters (e.g. Sky Sports or BT Sports) in 2018. The sample also included one radio broadcast on a commercial sports radio station (TalkSport).

A gambling marketing reference was defined as any visual reference to gambling or to a gambling brand, lasting one second or more, during the broadcast programme or commercial break[8]. Each gambling reference was coded based on set criteria (e.g. whether it was in play or out of play, what the duration of the reference was).

1.5.7   Strand 7 – quantitative survey of children and young people

Led by ScotCen, strand 7 will provide a nationally representative measure of exposure and impact among children and young people. This strand is currently in progress, and likely to report in December 2019.

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[7] It should be noted that this research has not been restricted to accounts that have a British gambling licence. Further research is required to fully understand how and why users engage with the content identified through the research.

[8] Purves RI, Critchlow N., Stead M., Adams J. and Brown K. Alcohol Marketing during the UEFA EURO 2016 Football Tournament: A Frequency Analysis. International Journal of Environmental Research and Public Health. 29; 14(7). 2017.

1.5.8   Strands 8 and 9 – qualitative research with children, young people and vulnerable adults

Led by Ipsos MORI and ScotCen, a combination of focus groups and diary based in-depth interviews were conducted to provide a more nuanced understanding of exposure to gambling-related advertising in the context of other attitudes, behaviours and circumstances – including the frequency of exposure, which tone/format is most engaging, and the potential impact (both immediate and over time).

In total 28 children and young people, aged 11-24, and 32 vulnerable adults were included in the in-depth diary research, conducted by Ipsos MORI. Participants took part in three stages of research to gather evidence to explore the above objectives: i) an initial in-depth face-to-face interview; ii) a four-week diary research task to share examples of gambling advertising they saw during this time; and iii) a follow-up telephone interview to review the diary task.

Within the qualitative research conducted by ScotCen, a total of 83 people participated in either one of 13 focus groups or additional four in-depth interviews, including 62 young people aged 11-24, 13 adults with an experience of mental health problems, and 8 adults with problems with gambling. The definitions of vulnerability used are set out in Table 2.1 below.

Table 1.2: Vulnerable group definitions

Group 1 "people living in constrained economic circumstances"	Group 2 "people with limited capacity to understand information"	Group 3 "people already experiencing gambling problems"	Group 4 "people with experiences of mental health problems"
Ipsos MORI	Ipsos MORI	Ipsos MORI / ScotCen	ScotCen
• Routinely struggle with money / availability of disposable income / low income • People whose economic circumstances have recently changed	• First language is English and have difficulties with comprehension • First language not English and cannot speak English well	• Moderate or high-risk gambling	• Recruited with the support of national and local mental health support organisations

1.5.9   Strand 10 – analysis of 'click-through data'

This is led by Ipsos MORI and will include collection and aggregation of industry click-through data to ascertain conversion rate and engagement within online gambling-related advertising. This element is in progress and will be included in the Full Synthesis Report which will be published in due course.

1.6   Notes on interpretation

The following notes should be considered when drawing conclusions from the strands reported in this Interim Synthesis Report.

- **The literature review** is not able to cover all of the unpublished research, nor research published in languages aside from English. Moreover, eSports was not included as a specific search term at the beginning of the project. This later became an important part of the social media analysis and should be considered for future research.

- Similarly, **the media monitoring research** provides a comprehensive overview of the volume of gambling creatives but it cannot claim to capture every gambling ad distributed. Moreover, within the ads captured, spend is estimated by Ebiquity rather than known (see appendix for further information). The research would also benefit from the ability to compare trends of volume and spend to other similar countries or sectors.

- The purpose of **the avatar research** was to identify whether the avatar personality had an impact on which adverts they were being shown across all sites. Although designed to provide insight into which adverts each avatar was exposed to, it is acknowledged that browsing behaviour is more fluid and dynamic than can be captured in a pre-set model. Furthermore, it is unlikely that an individual would conduct such an intense amount of online browsing activity as to visit 150 sites every day. Within this research there were no visits to social media sites.

- **Twitter** is regularly used by millions of people in the UK, but the platform is not representative of the UK population. By mid-2018, around a fifth of UK adults had accessed Twitter within the last three months (21%)[9]. As such, research should be seen as indicative of exposure only on this platform rather than on social media more widely. Furthermore, it should be noted that this strand of research does not encompass the entirety of gambling activity on Twitter. While researchers have taken extensive steps to ensure that the majority of prominent voices along with a breadth of different types of gambling activity are represented in this study, our sample is extensive but not exhaustive. Finally, given that this research aims to take a comprehensive view of Twitter's gambling ecosystem, it is important to note that analysis has not been restricted to analysis of licences accounts in the UK. Some of these accounts therefore may fall out of scope of existing regulation (as per Gambling Commission remit) where they are not based in Britain and are not directly targeting a British audience – this is particularly the case within the eSports dataset. Though there is clearly engagement from British users within this dataset, further work is required to explore how and why users are engaging with this content.

- **The content analysis** is reflective of the random samples selected. Guided by the principles of coherence and meaningfulness, reliability and explicitness, and sensitivity to subjectivity, distinctive steps were undertaken to ensure the soundness of the analysis, including inter-coder reliability checks. However, it should be noted that the coding decisions reflect the judgement of researchers at University of Stirling and University of Bristol, not the possible judgments of other interested bodies.

- **The qualitative research** is intended to be illustrative rather than statistically reliable. Given the qualitative nature of the data collected from the in-depth interviews, mobile app diaries and focus groups, this report aims to provide detailed and exploratory findings that give insight into the experiences, attitudes, circumstances and behaviours of people, rather than statistical evidence from a representative sample. It is not possible in qualitative research to provide a precise or useful indication of the prevalence of a certain view or experience, due to the relatively small number of participants generally involved.

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[9] Ipsos MORI Tech Tracker, 2018 https://www.ipsos.com/ipsos-mori/en-uk/2-3-adults-britain-use-social-media

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The Social Research Institute works closely with national governments, local public services and the not-for-profit sector. Its c.200 research staff focus on public service and policy issues. Each has expertise in a particular part of the public sector, ensuring we have a detailed understanding of specific sectors and policy challenges. This, combined with our methods and communications expertise, helps ensure that our research makes a difference for decision makers and communities.