

RESEARCHING THE CAMPAIGN

The “Bet Regret” campaign was developed after an extensive review of existing research, consultations with academic experts and several waves of focus groups with frequent bettors.

This was supplemented by a major study conducted by YouGov on behalf of GambleAware (Frequent Gambler Segmentation Study 2018) which explored the behaviours, attitudes and profile of frequent male bettors in some depth. This was a quantitative survey of 2,097 men aged 16-45 in the UK who have gambled (bet online or in person on sports, or online casino) in the last four weeks. Fieldwork was undertaken between the 17 August and 5 September 2018, with figures weighted to be representative of the UK male gambling population by age, region and social grade.

This provided valuable insights that helped guide the development of the campaign strategy, and key findings are summarised on a separate page.

GambleAware have since commissioned Ipsos MORI to track the performance of the “Bet Regret” campaign which commenced in late February 2019 – monitoring campaign awareness and response, its impact on attitudes, conversations around betting, consideration of moderation, and betting behaviours. This research will be supplemented by indicators such as visits to the BeGambleAware website for information on moderation, uptake of moderation or exclusion tools and market data on betting behaviours.

Each wave of the Ipsos MORI tracking research comprises 600 frequent gamblers, men aged 16-44, betting on sports or online casino in the past 4 weeks (designated as the ‘Campaign Audience’ for the purposes of research) . Within this sample the research identifies a higher risk subset who bet on football 2 or more times a week, c.350 per wave (designated as the ‘Behaviour Change Audience’).

In addition, each wave of the tracking research includes a nationally representative sample of 1000 UK adults aged 16-65 (both sexes) to look at broader impact. In line with population data on gambling, this sample splits between the ‘Wider Gambling Audience’, c.500 adults who have gambled in any way in the past 4 weeks (incl. lotteries, bingo, etc.) and c.500 who have not gambled at all in the past 4 weeks (‘Non-Gambler Audience’).

The Baseline wave of this research was conducted 22-29 November 2018, Wave 2 30 April – 9 May 2019 (after the first burst of TV activity), Wave 3 25 July – 9 August 2019, Wave 4 24 September – 4 October 2019 (after the second burst of TV activity).

ONS data estimates the total UK population of men aged 16-44 to be 12.5m (8.3m of whom are aged 16-34). Within we estimate (from the Ipsos MORI research) that the Campaign Audience comprises 3.7m men aged 16-44 gambling on sports or online casino in the past 4 weeks (2.4m of whom are aged 16-34). The Behaviour Change Audience within this (betting 2+ times a week on football) numbers 2.1m men aged 16-44 (1.4m of whom are aged 16-34).

A separate page summarises key learnings across these 4 waves of tracking research relating to the impact of the first 2 bursts of “Bet Regret” campaign activity, March/April and August/ September 2019

KEY LEARNINGS ON CAMPAIGN IMPACT AFTER 4 WAVES OF RESEARCH (NOVEMBER 2019)*

With 4 waves of data available we are now in a position to identify clear patterns in the way that the campaign is working.

Campaign spend for 2019 is £3.3m, which represents a 2.6% share of voice in terms of all sports betting advertising. The focus for this first 9 months of activity has been awareness and increasing readiness to moderate, with the intention of building on this next year by focusing on behaviour change by promoting specific betting moderation techniques. Nevertheless, we have already some indications of impact on behaviour in this first year of the “Bet Regret” campaign.

The key positives to date are:

#1 – Campaign recognition is high, well-targeted to those most at risk who rate it as engaging and relevant, message outtake is strong

Media Plans were closely targeted on frequent male sports bettors, and this is reflected in the awareness levels by audience that have been achieved. By Wave 4 “Bet Regret” campaign recognition had risen to 67% amongst our Campaign Audience, 70% amongst our core Behaviour Change Audience, and 77% amongst those in the highest risk band (vs. 44% amongst all adult gamblers, and 24% amongst adult non-gamblers). Campaign recognition is higher than achieved by the ‘When The Fun Stops Stop’ campaign at the same stage, and also compares favourably with indicative norms based on similar campaigns.

The campaign scores highly on being believable (67% at Wave 4), memorable (62%), relatable (58%), entertaining (49%) and relevant to me (49%).

Message outtake is strong with people taking out 3.5 key messages on average, the top 6 being (at Wave 4): You shouldn’t let you gambling get out of control (42%); You shouldn’t bet when you have been drinking too much (42%); It’s easy to get drawn in to make impulsive, ill-considered bets (37%); You shouldn’t make bets that you will immediately regret (37%); You shouldn’t chase your losses (37%); Think twice before you make a bet (35%).

#2 – Increasing numbers are reporting that they are thinking more about their gambling and considering cutting down

Changes here are gradual, but in the right direction – and it should be noted of course that many of our Campaign Audience our message is precautionary, with those currently gambling moderately having no immediate need to consider their behaviour.

At Wave 4 44% agree that ‘I am thinking more about my gambling than I used to’ (vs. 40% at Wave 1), and 41% agree that ‘I intend to cut down my gambling in the future’ (vs. 37% at Wave 1).

#3 – Increase in numbers reporting actions to cut down, and a reduction those reporting in gambling in risky situations/ states linked directly to the campaign

Although behaviour change had not been our main focus in Year One, we are seeing increasing numbers reporting actions to cut down their gambling. At Wave 4 36% agree that ‘I have recently cut down my gambling’ (vs. 32% at Wave 1), and 37% agree that ‘I am actually changing my gambling habits to cut down or stop’ (vs. 31% at Wave 1).

We are also seeing reductions in numbers reporting gambling in ways highlighted in the campaign as causes of “Bet Regret”: at Wave 4 12% report betting on a sport they don’t know much about in the past 4 weeks (vs. 23% at Wave 3); 17% betting when drunk (vs. 20% at Wave 3); 17% betting soon after they have lost (vs. 20% at Wave 3); 33% betting because bored (vs. 37% at Wave 3).

Other learnings and observations from the first 4 waves of tracking research

- ‘In principle’ awareness of the risks of gambling, and signs that someone might be gambling too much, is already high and has remained at a high throughout the campaign. Equally there is good awareness amongst gamblers that it’s easy to get drawn and make impulsive, ill-considered bets and self-awareness amongst many that this is something they at times do.
- The campaign has not impacted on the volume of conversations about gambling – with a fairly constant level of c.50% reporting ever speaking others about gambling, and a similar number being spoken to (this figure reduces to c.20% when related to conversations in the past month. However, the nature of conversations is changing, being increasingly more likely to be peer-to-peer.
- Frequent gambler’s knowledge about how to cut down their gambling (should they need to) remains fairly high, with over 70% agreeing they would know what to do throughout the campaign – but there is a substantial group of c.30% who feel that they would need a bit more information to help them cut down.
- Preferences on how to cut down vary – there is no single approach that engages all, and indeed the average respondent mention c.3 ways they might approach it. The top 3 strategies mentioned in Wave 4 are: Think twice before you make a bet (36%); Set limits through your online gambling accounts (30%); and just Setting limits in advance(28%).
- A third say that they would just use their own efforts if they wanted to cut down or stop. A growing proportion said that they would turn to the BeGambleAware website for advice or support (33% of the Behaviour Change Audience at Wave 4, up from 26% at the Baseline) .

Overall this data shows fairly high levels of ‘in principle’ awareness of risks and knowledge about how to cut down – and that the main challenge is to help translate this awareness into behaviour change via nudges and tools that help people gamble more safely. Work is currently in development to provide specific and simple nudges to help bettors pause and reconsider, thereby avoiding “Bet Regret”.

*All figures relate to the Campaign Audience of frequent male gamblers aged 16-44, betting on sports or online casino in the past 4 weeks, unless indicated otherwise.

YUOGOV GAMBLEAWARE FREQUENT GAMBLER SEGMENTATION STUDY*

A full report comprising detailed data slides can be viewed and downloaded from a link to provided on our website. The complete underlying dataset is available in SPSS format on application to researchers in accordance with GambleAware's data sharing policy.

A key focus of this research was a segmentation of frequent bettors based on gambling attitudes, perceptions and behaviours. 6 segments were identified following a factor analysis to identify key discriminating variables, then a cluster analysis of respondents based on these variables.

3 of these segments (comprising 31% of the total sample) were identified as a key focus for any intervention, being more frequent gamblers, relatively high risk based on PGSI problem gambling indicators, with reasonable numbers expressing readiness to cut down:

Segment A (10%): Gamble more than others to relax and escape from the stresses of life – currently bet frequently, often exhibiting risky behaviours (High Risk).

Segment B (10%): Tend to struggle with gambling as they often do with other things in their life – low ability to delay gratification (Higher Risk).

Segment C (12%): Regular bettors across sports, more than others seeing it as a test of their knowledge and skill – but still displaying sometimes risky behaviours (Medium Risk).

There is a high incidence of higher risk gamblers in Segments A-C: 100% of Segment A are in medium or high-risk bands (derived from PGSI indicators), 97% of Segment B, 24% of Segment C.

Related to this they are much more frequent gamblers: 74% of Segment A bet 3 or more days a week, 50% of Segment B, 67% of Segment C.

Segments A and B are characterised by very low scores on ability to delay gratification (i.e. strong bias to impulsive behaviours generally) – and tend to score low on self-efficacy (i.e. ability to set and stick to a plan of action). Both segments show a strong bias to low mental well-being on the Short Warwick-Edinburgh Mental Wellbeing Scale. They are also the segments most likely to be smokers.

47% of Segment A agree that 'Sometimes I think I should cut down my gambling', rising to 80% amongst Segment B (33% amongst Segment C).

Segments D, E, F are lower risk, being currently more moderate and controlled in their behaviours, but remain important as a prevention audience (problem gambling is often episodic, with episodes of excessive and harmful gambling triggered by specific circumstances or life events):

Segment D (23%): Regular but more moderate bettors – some risky behaviours but, with reasonably high self-efficacy, generally in control of their gambling and finances.

Segment E (24%): More occasional bettors, mainly on football, mainly for fun – low risk of suffering gambling harms based on both behaviour and personality.

Segment F (21%): Least frequent and lowest risk group, happy to dabble occasionally with no concerns about their gambling.

All 6 segments have been profiled in detail in the full report.

* Fieldwork was conducted 17 August – 5 September 2018. Unless otherwise indicated data relate to frequent male bettors aged 16-45.