Safer Gambling development research debrief

September 2018
Contents

• Background and objectives
• Observations on the audience
• Gambling Journey
• GambleAware
• Concepts
• Tools
Sample Details

All respondents were male and gambled 2+ times a week on sports or casino.

All agreed with a minimum of two statements:

- When gambling I chase my losses
- I think about gambling when I should be thinking about other things
- I bet more than I can afford to lose
- I need to bet increasing amounts to get the same excitement
- I feel guilty about the way I gamble
- I use gambling as a means of escapism
- I have lied about how much or how often I gamble

<table>
<thead>
<tr>
<th>No</th>
<th>Age</th>
<th>SEG</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>18 - 24</td>
<td>C2D</td>
<td>Watford</td>
</tr>
<tr>
<td>2</td>
<td>25 - 34</td>
<td>BC1</td>
<td>Watford</td>
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<tr>
<td>3</td>
<td>18 - 24</td>
<td>BC1</td>
<td>Glasgow</td>
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<tr>
<td>4</td>
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<td>C2D</td>
<td>Glasgow</td>
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Background and objectives

To explore the best way to communicate with frequent gamblers, to motivate them to self-reflect and ultimately moderate their gambling behaviour.

There has been a proliferation in the number of gambling products, their availability 24/7, and the promotion and visibility of gambling, especially within sports culture

This has led to an increase in the social acceptability of gambling as a normal part of everyday life

GambleAware and their agency M&C Saatchi are looking to develop a responsible gambling comms campaign to run for 2 years to de-normalise gambling and reduce the risk of harm to a frequent gambling audience

Research was required to understand the audience more deeply: how they feel about gambling, whether they reflect on their gambling behaviours and what measures they put in place to maintain responsible gambling.

The team to be used to put together a brief for the campaign
Observations on the audience
We spoke to a wide range of gamblers with a spectrum of behaviour and attitudes
With a small sample hard to pull apart the effect of specific demographics: age vs SEG
Young vs Old

Fewer responsibilities: most still living with parents, some about to go / just left uni

At that age behaviour still in flux: might grow out of certain behaviours, or habits become established

Grown up in a world of smartphones, rather than bookies

  I wouldn’t know what to do, how it works

Gambling solitary, virtual, spontaneous, ubiquitous

  - You share your wins, you keep quiet about your losses

25-34s range of lifestages

  - Some with greater obligations: partners, children, responsible jobs
  - Some still living with parents, or on their own
  - NB surprisingly few in Glasgow in settled families

Behaviour more settled

  - But for some an indication that they have settled into more risky behaviours

Remember a time before smartphones

  - Some still gambling in a more traditional way at the bookies
  - Phone bets feel more of an ‘addition’ – ‘a cheeky bet’ rather than simply a ‘bet’
## Virtual vs Real

<table>
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<tr>
<th>Virtual</th>
<th>Real</th>
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<tbody>
<tr>
<td>Their opportunities to set restrictions are limited to how much they add to an account and not betting on the original stake</td>
<td>More social</td>
</tr>
<tr>
<td>Easy restrictions to bend/break</td>
<td>They will and of course do bet in a solitary way, but it has greater relevance in a social setting</td>
</tr>
<tr>
<td>The majority don’t remove winnings to spend ‘in the real world’</td>
<td>Social betters tend to be older</td>
</tr>
<tr>
<td>Only comes into effect later, if they have a particularly good day – when they’ll remove a portion of it</td>
<td>Rooted in a setting of sport / drinking / sociability</td>
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<tr>
<td>Treat a bet on the phone like a check up on social media, whenever you have a moment</td>
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<td>Much more prevalent amongst 18-24s</td>
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Solo vs Social

Secrecy for some
- From partners / family

Usually it’s the amount bet, rather than the fact of betting
- Phones make it easier to keep behaviours private

Secrecy more a symptom of shame / guilt than a cause

Social

Phones can make secrecy easy but can also facilitate disclosure

Sometimes I show my girlfriend how my betting spend is tracking, I’m convinced she thinks I’m worse than I am

Wins are usually shared
- Via phones

Those for whom betting is more social share the whole experience
The effect of class

Inevitably gambling can become a problem much more quickly for C2Ds

- Much more difficult to keep a budget for ‘fun’ away from essential bills
- Heavy losses can easily mean a bill unpaid / missing out on social events / need to borrow from parents / take out payday loan

BC1s more likely to rationalise and consciously plan their behaviour

- Self-reflection comes more naturally?
- Or greater obligations necessitate it? NB older BC1s in our sample more likely to be family men than older C2Ds

C2Ds more likely to have ‘ended up’ in a pattern of behaviour, eg Sat night down the pub with your pals, where context limited play

- Men from a more traditional working class backgrounds will have grown up with a world of bookies and pubs so this is a natural course of events
- However can more easily slip into more riskier behaviour patterns?
Betting is seen differently from other types of gambling
Betting enhances sport

For some it provides the setting and context of betting
  • Pavlovian response!
  • Often very sociable / competitive
  • Bets can be shared / discussed, friends ribbed for losses, wins can be celebrated
  • You couldn’t divorce the two

For others it is part of the repertoire of occasions

It can make an exciting match more exciting and it can liven up a match that is not so exciting / where you have less emotional investment

Provides a rationale to watch all kinds of sports you might not be interested in
  It’s the only way I can watch golf

I bet on any sports on the telly, makes it more enjoyable. Betting makes it more exciting

I can’t think of a sport I’ve never gambled on, except cricket because it takes too long

I’m betting less now because there aren’t many big games at the moment
Betting vs Gambling

There are subtle but clear differences between discourse around betting and discourse around gambling, fundamentally gambling feels much more loaded than betting.
Betting feels like it involves ‘knowledge’
BETTING OCCASIONS
I always bet when...

- Sport is on
- The football is on
- I have enough money to risk it
- I’m bored

- I’m with my mates
- With friends
- I have nothing else to do

- I know I’m going to win
- I feel I can win
- I have spare cash
- My team are playing

- I have expendable income
- Watching football
- It’s a Saturday
- Horse races

- I get paid
- Watching sports
- I’m bored
- I have nothing else to do
I never bet on...

Sport I don’t know about

Fruit machines

Golf or tennis

Roulette

Rugby

Football

The dogs

Games I don’t know how to play

Poker

Horse racing

Weekdays

Arsenal finals

Wednesday

Things I don’t know

Golf
No two gamblers are the same

Focusing on a universal behaviour is hard to achieve – reaching a common emotional truth may be easier!

Finding a behavioural common ground amongst gamblers is hard, one person’s habitat or routine is out of the ordinary for someone else

One person’s hardline rule is passed by without second glance by someone else

Equally one persons ‘cheeky’ £5 bet is another person’s serious investment

A big loss is an irritant for some, but could mean you can’t fill the van up or can’t buy the electricity bill for others

It feels like finding commonality on frequency of betting, what they bet on, or how much they bet will be hard to achieve and even harder to find a ‘rule’ that works across segments

However, the emotional journey of the bettor feels considerably more universal and this is where we believe the opportunity lies
Gambling Journey
The specifics will be different for each individual, the journey will be the same
The betting journey

The trigger

- i.e. phone prompt, occasion, routine

The bet

- Feeling superior
  - I know this (and they don't)

- Feeling smart
  - I have a hunch

The result

- Triumph
  - Ego boost
  - I’ve won (and I was right!)

- Thrill / Anticipation
  - Can even be surprise!

- Thrill / Anticipation

- Feeling superior

- Feeling smart

- Relief

- I’ve lost

Betting is always motivated by thinking I know what’s going to happen.
But not all losses are the same
The anatomy of a loss

I've lost
(I was unlucky)

I've lost
(but it was unlikely anyway)

I've lost
(and I'm kicking myself!)

Disappointment

Annoyance

Acceptance

Regret
Loss is inevitable but there are different kinds

Everyone is always annoyed when they lose

• It’s not a surprise – deep down everyone knows the house always wins
• But every bet is placed in hope

However there are different kinds of loss

There are the ones you expect to win, felt like an informed decision, you placed a bet, feeling you had ‘knowledge’ and you were unlucky– annoying

There are the bets that were a long shot anyway, but were a calculated long shot, would have been a amazing if you won, but you accepted that you didn’t – che sara sara

And then there are the bets that for whatever reason you felt you should not have placed (and these are different for different people)

• The ‘cheeky’ bets, the bets made when drunk, the ones where they chased the loss, or where they had felt emboldened by a win – these bets cause regret
The opportunity lies in focussing on how a ‘bad’ bet feels, rather than the definition of a ‘bad’ bet.
GambleAware
Perceptions of GambleAware

Awareness of GambleAware isn’t high, but easy enough to ‘join the dots’
• when familiar with drinkaware etc

An organization? A command? A campaign?

Strong feeling that it is a legal requirement
• That betting / gambling companies are required to display
• Like tobacco / alcohol warnings

Or some kind of message from the Government

A few are aware that GambleAware is a charity and offers services like a helpline

Associated with When the FUN STOPS STOP

They’re just doing it because they have to

It’s a tick box, it’s small print

I think it’s an organisation, kind of helpline things that gives you advice and counselling
**When the FUN STOPS STOP**

Very well-known, ‘sticky’, brings a smile to the face

But does not seem to encourage the self-reflection it is there to drive

Assumed to be targeted at the problem gambler for whom gambling is a compulsion rather than an enjoyable pastime

Feels much more like gambling at the casino: where you go in with your cash, you play roulette, you stop when the money runs out, you come out (or not!) – finite experience
  - Does not feel so much like the rhythm of betting: more of a roller-coaster, spike and then falling away

We also wonder if it does not resonate because of the word ‘fun’
  - Betting isn’t exactly fun
  - Rather it’s exciting, thrilling, competitive, challenging, can feel ‘skilled’

*I think it’s too late to get people to stop betting if they already do*

*It’s very catchy*

*Good slogan, I think some people may be take note of it*
Concepts
Insights

Is this normal?
With so many opportunities to gamble these days, it’s easy to get caught up and not think about whether your betting is normal or not.

Are you gambling with your eyes open?
When you love sport, you’re backing on your sporting knowledge when you make a bet, not just the odds.

Cut out the excess bets
It’s too easy to place a bet these days, so your betting can creep up and you end up regretting more of the bets you’ve made.
Narratives

Is this normal?

When you think about gambling nowadays what is normal and what is a bit too far?

Betting on the toilet?

Betting on sports you know nothing about, or against your favourite team?

To be clueless about how much you bet on the weekend?

It should be normal to say no a bit more often, to gamble a little less

Are you gambling with your eyes open?

The betting companies love the impulsive bets, the ‘in play’ bets and Accas, the moneymaking bets where the odds look deceptively good, but the real odds of winning are much, much longer.

All those random bets where unpredictability is stacked in the betting companies favour. Maybe it’s time to pause, think and take a reality check?

To cut out the mug bets, gamble a little less and enjoy life a little more

Cut out the excess bets

There are too many shouty ‘bet now’ ads, too many free bet offers and cash out deals and too many bets we didn’t mean to make.

So cut out the excess bets.

The bored bets to fill some time, the extra odds that caught your eye, or the random tip off you heard about. Close your betting app while the football is on and enjoy the extra money in your account.
Is this normal?

Everyone agrees that there are lots of opportunities to bet but for the younger target this is not a change, this is the how the world is

- Older people observe change in a way that younger people can’t

The idea of an objective definition of ‘normal’ does not feel resonant

- Everyone’s ‘normal’ is different
- And every gambler feels their behaviour and circumstances are different (they don’t want to be lumped in with other gamblers)

It is perhaps easier to define a problem gambler, but anything defined as ‘abnormal’ feels ‘extreme’ / problem gambler

- No-one feels their behaviour is extreme, that’s always other people
- Although we feel there were 1-2 people in our sample who could recognise in themselves / others they knew

Using the word ‘normal’ isn’t a good idea. Maybe they should use the word ‘excessive’

Feels like it’s targeting people who don’t make educated bets. The way I do it is more educated

GambleAware can’t say what’s normal and what’s not
Is this normal?

Examples of ‘not normal’ betting did not seem to resonate across the board.

For some betting on a sport you didn’t know about or being clueless about how much you have spent on bets were indeed ‘red flags’
- And we have seen how much perceived ‘knowledge’ plays a part in betting.

For others they were acceptable once in a while, like drinking heavily on a night out.

Sense that it is more about behaviour in the aggregate, rather than specific incidents
- Difference between a one-off and a pattern.

But just as importantly the tone was off-putting, a finger-wag
- Only a problem gambler who has admitted they have a problem could respond and connect with this.
Betting is individual, there is no objective ‘normal’
Are you gambling with your eyes wide open?

The idea that betting is bound up with knowledge strikes a chord

- Every bet is placed with a feeling that you know something that you could turn to your advantage
- And for many the idea of betting on a sport that you don’t know does feel like a sign of going too far – although not automatically the sign of a problem gambler

Those with a degree of self-knowledge could appreciate that the gambler could be seduced by all kinds of offers and types of bets

- But for most that was part of the deal
- Making bets available that you choose to go for
- Even if the odds were long

And appreciate the idea of taking a pause for reflection

But for most the tone was far too dictatorial and assumptive

I like how it’s being honest about how betting companies are actually just trying to entice you in

Seems a bit judgemental

I don’t think stopping gambling and enjoying life are mutually exclusive
Mug bets

The ‘mug bets’ are actually the bets that are the most attractive and offer the opportunity to win big.

You never know what’s going to come in and therefore they can be the most exciting.

This suggestion that you needed to cut back on what made gambling exciting tended to be resented.

• By all but those few who knew they had a problem

Those who felt comfortable with their behaviour resented it.

I don’t get that. Most bets are mug bets to be honest.

It’s encouraging, but it’s also saying ‘don’t bet’ which is annoying.

It’s too heavy on what you should and shouldn’t do.
Cut out the excess bet

As we have already seen only the older betters can sense the world has changed

If betting behaviour does creep up (and this is a phenomenon that is recognised) it tends to be attributed to the individual
  • Their personal circumstances, any particular stresses they might be under

Usually those who had experienced this and cut back felt the trigger for behaviour change had been a struggle to pay the bills / meet everyday expenses
  • Cut back abstained for a while
    Left the phone with the wife
    Deleted the app
    Stopped betting on sports I didn’t know about
    Day of the week
    People they were with

It’s an ambiguous meaning. It’s more about the amount you spend than the number of bets

Don’t think the message will sink in for people who don’t have a problem

It’s not hitting the nail on the head for me.
What’s an excess bet?

While there are undeniably ‘bets we didn’t mean to make’ the ads, the offers, the deals, extra odds, random tip-offs are all opportunities

- Which could all pay out
- If you eyed up the deal and felt it was good then it was not automatically an excess bet

Those who bet on the phones talked about betting to relieve boredom

- Betting akin to social media
- Filling in the odd moments when nothing better to do
- But because of this not automatically a bad thing

Closing the betting app during the football was contrary to all their experience

- This is what made the match more fun

And if betting is an exciting leisure pursuit then you want to spend the money on it

- Rather than enjoy the extra money in your account
There is no clear definition of a ‘mug bet’
Tools
Concepts we explored

THE REAL ODDS       KNOW WHAT YOU SPEND       SETTING LIMITS

GAMBLE SNOOZE       A BET FREE MONTH        COMPARISON

BET FREE DAYS       BETTING SWAPS
### Overview – Opportunity for GambleAware concepts

<table>
<thead>
<tr>
<th>Help Reflection</th>
<th>Could go either way</th>
<th>Get limited buy-in</th>
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<tbody>
<tr>
<td>KNOW WHAT YOU SPEND</td>
<td>COMPARISON</td>
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<tr>
<td></td>
<td></td>
<td>BET FREE DAYS</td>
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Know what you spend

This unanimously came out top of the pile: it works for those who have one app but think you have to go out of your way to find the information and those who have multiple apps and like the idea of a consolidated view.

It is the tool which is closest to mirroring the desired action for the comms, if gives people the power and information they need to reflect and then decide for themselves if their gambling behaviours should change.

It doesn’t necessarily need to go as far as articulating the consequences of your betting, i.e. you’ve spent lost more this month than last month, or you placed more bets more this month than last month, although some would appreciate this.

The vast majority know their behaviour flexes and changes and they’re comfortable with this.

I can see it being like the Monzo tool, so it doesn’t just show me how much I’ve spent in total but how much on accumulators, in-play bets etc.

Great to see how much you’re actually winning or losing.

Good idea the Missis would love this one.

Maybe, but you can do that already.
Comparison

As a tool this often appeared in the top two or three, as in many ways it communicates consequence to the ‘know what you spend’ tool.

And for some this can be powerful.

However, it feels as if it is more motivating for the more affluent / those who can spend that money on the fun extras.

For those who exist with shorter financial time horizons, it can often give ideas:

- Demonstrates what they can do with money they don’t have.

And…the easiest way to get that could be….by betting more!

It would probably be too depressing, but that could also work.

I might think I could just get that holiday or whatever if I won big so gamble again.

I don’t want to know, I don’t need to know, it’s like buying furniture - you could spend the money on fun experiences, but you don’t because you put the money aside to buy the furniture.
The real odds

The overriding response to ‘the real odds’ as a tool is that there is no such
• It wouldn’t be possible to achieve

Gamblers know that the odds aren’t real
• but they’re the odds on offer that they are / aren’t willing to play

For those that did feel more positively about the tool felt they could use it as a tool to support their gambling
• Rather than as a tool for reflection or to encourage moderation

I know the odds aren’t real, is it even possible to have real odds

There’s no actual odds, it’s only ever made up

I think I’d just end up using it as a tool to help me bet, I’d end up finding another one even if I didn’t make the one I intended
Gamble snooze & setting limits

Both the Gamble Snooze and Setting Limits are things people could do already – but you have to want to and most don’t feel like they need to

Instead, strong feeling that these would be needed by people worse off than themselves and for those desperate gamblers they might not work anyway

Felt they would struggle to encourage individuals to reflect on their behaviour
  • Thought they’d still be thinking about betting in the same way they do now
  • But could make you slow down

And indeed could also make you place more bets in a smaller window as you’d spend more time thinking about betting in the periods of time when you can’t!

If you’re at the point where you need a snooze button you’re probably past being helped

If you’re that desperate you can just go to the bookies

I thought this existed already, you can put a limit on your apps
Bet free days & months / betting swaps

These tend to be dismissed quickly,

For those with more regulated behaviour they already have bet free days or months, neither seems all that scary a prospect for them to consider they could or should behave differently

For those who are more sporadic gamblers, the regularity isn’t a driver to encourage them to think about their behaviour, so it instantly doesn’t apply to them

For those more continuous gamblers there isn’t enough incentive for them to take-part, there are no consequences and no tools within this to encourage them to keep on track

Swaps roundly rejected for being patronizing and infantilizing

Like colouring books

I don’t think a month is that long – maybe if you have a problem

I don’t bet everyday so this wouldn’t make a difference

I don’t think people would sign up to this, how do you enforce it, you’d need to sign up as a group [bet free month]

Nah that’s insulting that you’re only doing it because you’re that bored
Key thoughts
Key take-outs

1. Finding a universal truth for betting behaviour feels hard to do: one man’s ‘mug bet’ is another’s big opportunity.

2. But there do seem to be universal emotions experienced by everyone on their betting journey.

3. We believe the potential lies in the bets that you kick yourself for – rather than the bets that were bad luck or a long shot.

4. Needs to be expressed appropriately: so gamblers do not feel lectured adult to adult, rather parent to child.

5. Everyone liked the app that tells you how much you have spent (it’s adult to adult) but is this the kind of thing people say in groups?
And finally...one thought

Sharing air-time with betting companies feels relevant and (of course!) means you’ll reach your target efficiently

BUT

Is this the best context for encouraging self-reflection?

• Do you need the Sun am mindset rather than the Sat night?