

SAFER BETTING CAMPAIGN UPDATE – JUNE 2019

Objectives

Overall Campaign Objective & Goal:

To moderate the gambling behaviour of risky sports bettors*

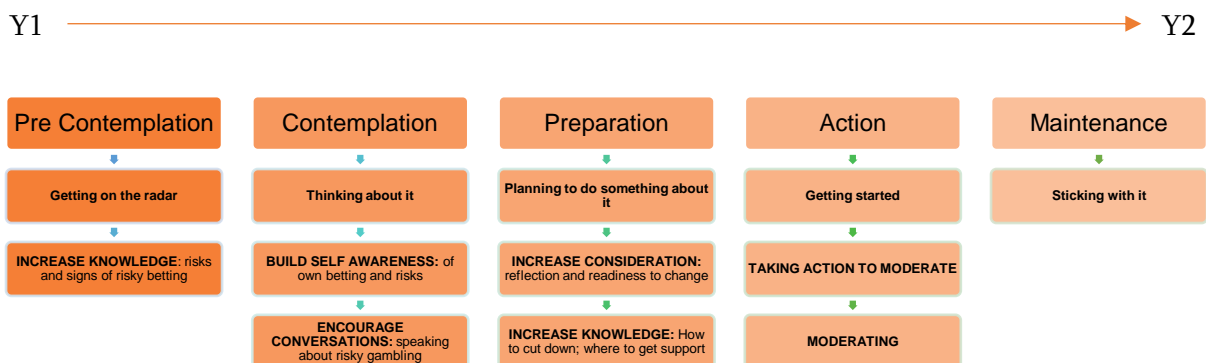
(* With the primary focus on young men (16-34) who gamble 2 or more times a week, who bet online and who bet on football.)

Specific Advertising Campaign Objectives:

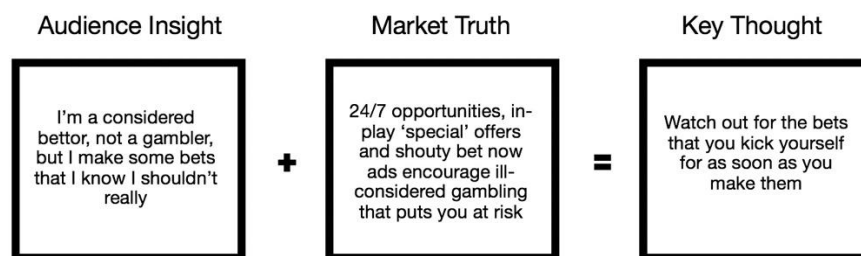
Year One: To shift attitudes and provoke conversation on the moderation of sports betting, through the avoidance of impulsive, risky behaviours such as chasing losses in the heat of the moment. (All audiences)

Year Two: To increase the numbers of risky sports bettors taking steps to cut down their gambling, both generally and by deploying specific moderation techniques and aids. (Behaviour Change Audience)

Delivery of these objectives were then mapped against a behaviour change model as summarised below:



Creative Strategy



Creative Platform



Bring to life the sinking feeling you get the minute you make an ill-considered bet without thinking it through. Often when chasing losses, bored or inebriated.

Campaign strategy and development was based on extensive research, both quantitative and qualitative, and consultations with academic experts.

Over time the campaign will evolve across our behaviour change 'logic model':

- *Pre Contemplation* – Increase knowledge of risky betting behaviour
- *Contemplation* – Build self-awareness and encourage conversations
- *Preparation* – Increase readiness to change and knowledge of how to cut down
- *Action* – Taking action to cut down
- *Maintenance* – Sticking with it

The campaign to date has focused mainly on the first stages of this model, but as we go forward will focus increasingly on Action.

Media Strategy

Media strategy is closely focused on young male sports bettors, (around sport and high propensity gambling occasions, primarily focused on football, secondarily on racing.

The media strategy is built around three pillars of insight from the campaign audiences.

- *Mindframe*; sports events are the trigger for sports betting, so proximity to events are key, building our media presence in and around the biggest betting events
- *Receptivity*; building presence in bettors' "cold states" post event where they are more likely to be receptive to self-reflection
- *Targeting*; sports media has a greater conversion to sports bettors than other broadcast media, balanced against the heavy digital consumption of the core demographic

The first burst ran from mid-February up to the end of April with TV, in stadia posters and pub screens., alongside a digital always on media presence with You Tube pre rolls, digital display and Twitter. , The next major burst is planned for the start of the 19/20 football season. Overall media spent to date is c.1.5m, most of which has been donated as free space (Sky, ITV, C4/ BT Sport, Google/ You Tube).

Underpinning the media, there are a series of activation plans amplifying Bet Regret in the sports bettor's community to encourage self- reflection on ill-considered bets. These include the No Bet Inn, Barber tour and Bet Regret Cup – a grass roots football tournament.

Campaign Tracking

The following summary relates to the second wave of online research conducted by Ipsos MORI between 30 April and 09 May 2019, following the first burst of campaign activity. A baseline survey was undertaken 22-29 November 2018.

A total of 1,600 interviews was carried out for each wave, a Campaign Audience sample including of 600 UK males aged 16-44 who have bet on sports in the past 4 weeks (a subset of this, termed as the Behaviour Change Audience, comprises 345 frequent bettors who bet on football at least twice a week; we also refer to a subset of 202 High Risk Gamblers scoring in the top band in terms of risk in terms of responses to Q10). To cover campaign impacts beyond the main Campaign Audience, we also have a nationally representative sample of 1000 UK adults aged 16-65, comprising a Wider Gambling Audience of 607 who have participated in any form of gambling in the past 4 weeks and 388 Non-Gamblers in these terms.

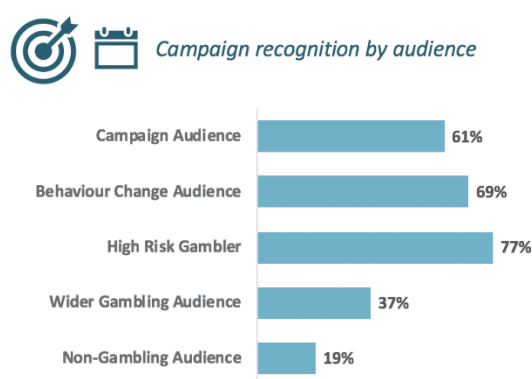
Samples for each wave were a close match in terms of demographics and gambling frequency. Unless otherwise stated figures quoted relate to the Campaign Audience.

Although early stages, the summary of key findings that follows shows a very positive response to the campaign.

Key Findings Summary

1. The campaign is well-targeted against those at most risk

The campaign has effectively reached and engaged those for whom the message is most relevant, i.e. more frequent bettors. As a result of media and creative targeting, overall campaign recognition is much higher amongst the Campaign Audience – and in particular the Behaviour Change Audience and those in the High Risk band – than the Wider (less frequent) Gambling Audience and Non-Gamblers.



2. Campaign awareness and message take out is strong

Given weight and early stage, at 61% overall campaign recognition – the number recalling seeing one or more elements of the campaign – is high. This compares favourably with recognition of the 'When The Fun Stops Stop' campaign, which was 54% amongst regular gamblers at the equivalent stage of the campaign. Memorability ratings also compare favourably.

Executional ratings were strong in terms of ‘relevant to me’, ‘entertaining’, ‘believable’ and ‘memorable’, especially amongst more frequent gamblers.

Message take out was also very strong, with the top take out amongst the Campaign Audience being ‘You shouldn’t make bets that you will immediately regret’, followed by ‘It’s easy to get drawn in to make impulsive, ill-considered bets’, ‘You shouldn’t bet when you’ve been drinking too much’, you shouldn’t chase your losses (keep betting when you have lost’ and ‘You shouldn’t bet when you are bored’.

Some typical verbatims:

“Don’t impulse bet, don’t bet to chase money and stick to betting when its enjoyable and sensible.”

“Think before you bet, as you may regret betting just because you can.”

“Betting to recover previous losses, to kill time or after drinking will lead you to regret it. Set cooling off periods and limits to your spending.”

“To make you question why exactly are you gambling and is it the right thing to do? You might be losing more money than you can afford to.”

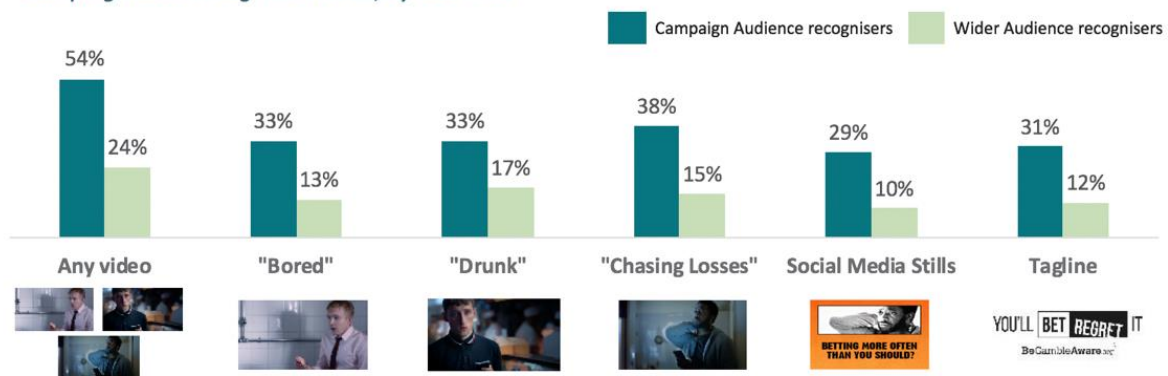
“The message they are trying to tell you is that people should bet responsibly so they don’t later regret making their bet.”

“Betting in the heat of the moment is something that seems a good idea at the time but you’ll regret it.”

3. All elements of the campaign are performing well

Video has driven campaign recognition – 54% recognised at least one of the 3 TVCs cf. 61% total campaign recognition. Only half of all aware of the campaign (31% vs. 61%) recognise the tagline’ and there is clearly scope to make it becomes a prominent part of the language of betting.

Campaign asset recognition levels, by audience



4. Indications that the social and attitudinal climate around frequent betting is shifting in the right direction, especially amongst more frequent bettors

At this early stage we are not seeing major changes in behaviour, seeking information or knowledge of how to moderate (already quite high) since the baseline.

However, the campaign is contributing to an environment where gambling risks and moderation are more top of mind amongst frequent sports bettors, with unprompted awareness of communications about the risks of gambling up significantly from 48% to 55% amongst the Campaign Audience, and from 52% to 57% amongst the Behaviour Change Audience (at a time it has actually fallen somewhat amongst the broader adult audience.)

Taken together, a number of directional changes suggest that the overall social and attitudinal climate around gambling and its moderation is shifting in the right direction.

There are indications that frequent bettors are becoming more mindful and wary of the pressures and risks of gambling impulsively and immoderately:

- Increase in agreeing 'I think more about my gambling than I used to' (from 40% to 44%)
- Fewer agreeing 'I sometimes make impulsive bets in the heat of the moment' (58% to 54%)
- Increase in agreeing 'There are too many opportunities to bet nowadays' (63% to 67%)
- Increase in agreeing 'With more and more opportunities to bet, it's easy to get drawn in to make impulsive, ill-considered bets' (from 67% to 71%)
- Increase in agreeing with broader risk statements: 'It's really important you only spend money you can afford to lose' (79% to 83%) and 'It's really important that it does not interfere with your job or other day-to-day commitments' (78% to 83%)

There are also indications that the tide may be turning on the normalisation of frequent sports betting, with frequent bettors perhaps becoming more defensive in talking about their own gambling behaviours since the baseline:

- Increase in the number agreeing 'I don't think I gamble too much' (from 64% to 74%)
- Decrease in number admitting 'Sometimes I think I should cut down' (from 37% to 34%)
- Increase in the number saying 'I know how to cut down if I want to' (from 72% to 78%)
- Small decrease in 'I sometimes make bets I know I shouldn't' (from 47% to 44%)

5. No real change in the number of conversations reported

Not a focus for the initial wave of communications but specific activity is being scoped and this will be an area where we are looking for shifts in the future.

6. Positive impact on BeGambleAware

Familiarity and favourability of BeGambleAware have increased, and there are also small increases in awareness amongst bettors of the BeGambleAware website and helpline as places to go to get help in cutting down if needed.

H2 Campaign Development

3 Key Areas for Development

1. Keep building self awareness and increase salience of Bet Regret (Pre Contemplation / Contemplation)
 - Continue to run the successful channels and assets to date
 - Consider landing Bet Regret in voiceover of end of TV adverts
 - Upweight shorter 6s formats which are more direct on 'Bet Regret' as a term

2. Encourage more conversations (Contemplation)
 - Rerun peer to peer social activity, which encourages people to tag each other
 - Start social platform partnerships with Ladbible, which are inherently conversation based.
 - Continue development of activations, particularly in the world of football, which provide opportunity to have conversations in the real world

3. Increase readiness to change, knowledge of how to cut down (Preparation) and taking an action (Action)
 - Introduce **specific piece of advice** as the antidote to Bet Regret

Defining the Piece of Advice to Introduce in H2

Bet Regret is defined by not thinking it through:

Bet Regret (noun) - the sinking feeling you get the minute you make a bet **without thinking it through**. Often when chasing losses, bored or inebriated.

The Antidote to 'not thinking it through' is to pause and reconsider:



Our advice therefore is to Think Twice:

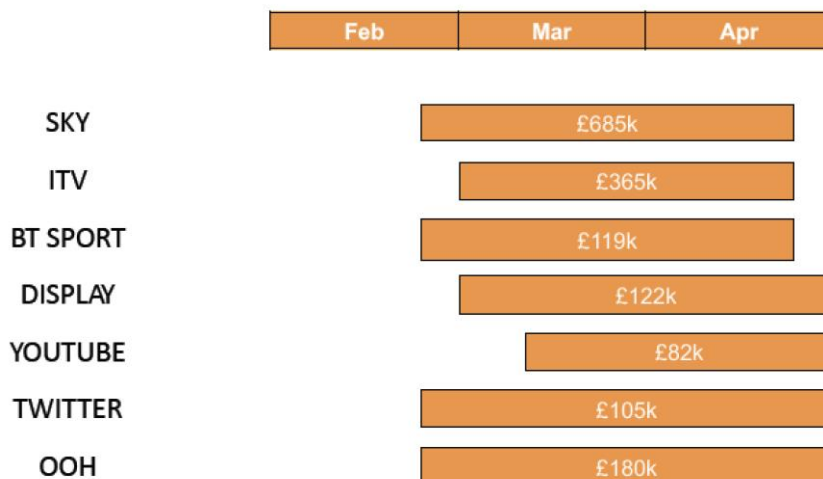
THINK TWICE OR YOU'LL BET REGRET IT.

Usage of Think Twice

Think Twice or You'll Bet regret it is a clear call to action, which can allow the campaign to stand in absence of the behaviours which have brought Bet Regret to life to date (Chasing Losses, Drunk Betting, Bored Betting). This gives the campaign flexibility to be used in donated inventory, where it may not be possible, or appropriate to introduce the behaviours. It also prepares us with something tangible as we gradually shift towards Preparation and Action phases in the logic model.

Appendix

Media Plan to Date



BET REGRET

BeGambleAware.org

Media Performance Update

Channel	Planned	Delivered	Benchmark Notes
Sky	6,772,000	5,062,000	TV value underdelivered – value available for H2
ITV	7,193,000	5,853,000	Total audience reach lower than generally bought 16-34M campaign (40% @3.6 vs 66%@5)
C4/BT Sport	2,637,000	1,551,000	This is due to airtime donation parameters and targeting strategy
MedialQ	43,660,036	44,517,429	Positive exit CPT vs planned
YouTube	n/a	4,723,436	Delivering £0.02 cost per view vs industry benchmark of £0.03-£0.09
Twitter	16,550,000	33,749,425	Delivering £0.02 per completion – far more efficient than planned leading to overdelivery
Socialite OOH	1,483,787	7,384,092	Delivered £164k in added value overdelivery
In Stadia OOH	12,284,695	14,411,360	£117k in added value overdelivery. Ran for 12 weeks instead of 2
FA Cup Perimeter	160,000,000	200,779,536	Reach boosted by BBC viewing up c.1m on planned

BET REGRET

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