

The Effect of Gambling Marketing and Advertising on Children, Young People and Vulnerable People

Qualitative Research Report

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1 Introduction

In March 2018, GambleAware commissioned a series of studies to assess the extent, nature and impact of gambling marketing on children, young people and vulnerable groups in the UK. Overall, the series of studies used a variety of methods to examine the extent of current gambling marketing in the UK across different media including social media, the nature and content of gambling marketing in different media, and how children, young people and vulnerable groups respond to gambling marketing. This report presents findings from the qualitative research conducted as part of this series of studies by ScotCen Social Research. The results of the gambling marketing survey of 11-24 year olds will report later in 2019.

For the purposes of this study, GambleAware defined ‘vulnerable groups’ as:

- Those living within economic constraints
- Those living with a limited capacity to understand information contained within gambling marketing and advertising
- Those already experiencing problems with their gambling.

After further discussions with GambleAware, it was decided that in addition to the research with those aged 11-24, the qualitative research led by ScotCen should also focus on the following ‘vulnerable groups’: those with mental health issues and problem gamblers.

2 Methodology

2.1 Ethics

Ethical approval for both the qualitative research and the survey was granted by NatCen Rec in April 2018.

2.2 Recruitment and consent

To recruit participants to take part in focus groups and interviews ScotCen enlisted the help of organisations who worked with: young people aged 11-24; adults with an experience of problem gambling; and adults who had experienced mental health problems. Over 60 organisations were contacted including: national youth organisations (such as YouthLink Scotland, Fast Forward, Girlguiding and British Youth Council) and local youth work and voluntary youth organisations, national and local mental health support organisations; and national organisations that support problem gamblers. To maintain the anonymity of participants, the names of the community organisations the study participants were drawn from are not included in this chapter.

For young people to be eligible to take part in a focus group they need to be aged 11 to 24, be able to provide informed consent to take part and speak English. Young people's experience of or exposure to gambling was not a criteria for recruitment. To engage young people from diverse social backgrounds, young people were recruited from a range of different organisations including: universities, local youth groups, and youth support groups based in areas of deprivation.

To recruit people to take part in the adult focus groups both local and national mental health and problem gambling support organisations were contacted. To qualify to take part in a focus group or interview individuals needed to be a member of one of the support organisations, able to provide informed consent to take part and speak English.

All organisations were initially contacted by email and followed up by telephone to facilitate recruitment to the focus groups. The organisations were provided with digital copies of the information sheet, privacy notice, consent form and poster to distribute to interested participants. Some national organisations placed information about the research in newsletters which were distributed to members. The information sheets stated that the research was being carried out to explore the effects of gambling promotion on young people aged 11 to 24, adults who had experienced mental health problems and adults who had experienced problems with gambling. The information sheet also outlined who was conducting the research, who the funder was, what participating in the research would involve, how the information participants provided would be used and how participants' personal details would be kept confidential. The privacy notice provided outlined in more details how personal data is stored and used and participants rights concerning the data they provide.

Interested organisations provided ScotCen with a date, time and venue for a focus group to take place. Where focus group participants were under the age of 16, participating organisations gathered signed consent forms from participants and their

parent/carer in advance of the focus group. For all other focus groups participants consent forms were made available in advance and directly before the focus group. Signed consent was obtained prior to the group discussion. All participants were offered a £20 Love2Shop voucher as a thank you for taking part.

2.3 Participants

The breakdown of focus groups and interviews by participant category is demonstrated in Table 1 below.

Table 1: Qualitative research (focus groups) by participant type

| Age group | Young people | Problem gamblers | Mental ill health | Total No. of Groups |
|--------------------|--------------|------------------|-------------------|---------------------|
| 11-15 years | 3 | | | 3 |
| 16-19 years | 4 | | | 4 |
| 20-24 years | 3 | | | 3 |
| 25 years and above | | 1* | 2 | 3 |

*Four in-depth interviews were also conducted with problem gamblers

The research team attempted to recruit young people to focus groups using three broad age ranges: 11-15, 16-19 and 20-24. However, as the young people were recruited from pre-existing youth groups, there was some overlap across the three age ranges (see Table 2). All participants, though, were aged between 11 and 24 years old.

In total, 83 people participated in a focus group (n=79) or interview (n=4); 47 were female and 36 were male. Nine out of 13 focus groups involved both male and female participants. Two focus groups with young people and one mental health group were female only, and one focus group with problem gamblers was male only. Sixty-two of the participants were young people aged 11-15 years (n=20), 16-19 years (n=31), or 20-24 years (n=11); 38 were female and 24 male. Thirteen adults with an experience of mental health problems (9 female, 4 male) and 8 adults with problems with gambling (all male) took part in a focus group (n=4) or interview (n=4).

2.4 Conducting the focus groups and interviews

Discussion guides for the focus groups were developed in consultation with the Institute for Social Marketing (ISM). The majority of the content covered in the focus groups and in-depth interviews was the same for the different participant types. The topic guides included questions to establish participant awareness, knowledge and attitudes of gambling and gambling marketing. Unprompted views of gambling marketing were sought initially, before actual examples of gambling marketing were shown to the research participants.

All focus groups and interviews investigated:

- Attitudes to gambling
- Awareness of/exposure to gambling marketing and advertising

- Exposure to gambling (direct / indirect)
- Examples of gambling activity they have engaged in
- Views of gambling marketing and advertising
- Perceived impact of gambling marketing and advertising, and how it relates to their own gambling behavior
- Views on how gambling marketing should be regulated

Young people and people with an experience of mental health problems were also asked about their:

- Perceptions of what might constitute gambling
- Awareness of gambling brands/organisations

Participants in both the mental health and young people focus groups were also invited to take part in a brand recognition exercise where they were shown small sections of the logos of nine gambling brands and asked to identify them. The exercise was taken from Fast Forward's, Gambling Education Toolkit (www.fastforward.org.uk/gamblingtoolkit)¹ and included the brands: Coral, The Big Lottery, Bet365, Ladbrokes, William Hill, Betfred, Foxy, Bingo, Paddy Power and SkyBet.

Those with an experience of problem gambling were not asked about these topics as this group was expected to have a good understanding of what gambling is and have a high level of awareness of gambling brands. Those with an experience of problem gambling who were interviewed were asked the same questions and prompt as those who took part in a focus group.

All focus group participants were shown examples (known as 'creatives') of gambling marketing. The creatives used in each focus group is outlined in Table 2 below. As interviews with adults with experience of problem gambling took place over the phone, gambling marketing creatives were not used.

Table 2: Gambling marketing creatives used in focus groups

| Focus Group | TV advert | Gambling creative | Gambling creative |
|-------------------------------|------------------|------------------------------|------------------------|
| Mental Health FG1 | Coral | Postcode Lottery (Door drop) | |
| Mental Health FG2 | Mecca Bingo | Postcode Lottery (Door drop) | |
| Problem Gambler FG1 | Paddy Power | Ladbrokes (complex bet) | Coral (complex bet) |
| Young people FG1 (age: 12-13) | Postcode Lottery | Coral (email) | Football pools (email) |
| Young people FG2 (age: 11-12) | Mecca Bingo | Postcode Lottery (Door drop) | |

¹ <https://fastforward.org.uk/gamblingtoolkit/wp-content/uploads/2019/03/Gambling-Education-Toolkit-WEBSITE-VERSION-March-19-1.pdf> (pages 92-94)

| | | | |
|-----------------------------------|------------------|----------------------------|---------------------------------|
| Young people FG3 (age: 13-18) | Health Lottery | Paddy Power (billboard) | SkyBet (billboard) |
| Young people FG4 (age: 16-17) | Coral | OJO (internet) | SunBets (internet) |
| Young people FG5 (age: 16-19) | Mecca Bingo | Betfair (print press) | Health Lottery (print press) |
| Young people FG6 (age: 15-18) | Health Lottery | | |
| Young people FG7 (age: 19-23) | Mecca Bingo | Paddy Power (billboard) | SkyBet (billboard) |
| Young people FG8 (age: 18-23) | Coral | OJO (internet) | SunBets (internet) |
| Young people FG9 (age: 14-19) | Health Lottery | SkyBet (billboard) | |
| Young people FG10 (age: 20-21) | Postcode Lottery | SkyBet (billboard) | Postcode Lottery (Door drop) |

All focus groups took place in a quiet and private space that was appropriate for the group. In most cases this was the venue that the group regularly met. Individual interviews were conducted by phone. All focus groups and interviews took approximately 60 minutes to complete. With the consent of participants, all focus groups and interviews were audio recorded using an encrypted digital recorder and transcribed for analysis.

2.5 Analysis

All transcripts were imported into and coded using NVivo 10, a software package for qualitative data analysis. This system of coding facilitates the organisation and analysis of qualitative transcripts and provides a tool to explore the range and diversity of views expressed by participants. Firstly, the key topics and issues which emerged from the research objectives and the data were identified through familiarisation with transcripts by members of the project team. A draft analytical framework was drawn up by the project team. Each transcript was coded, so that all the data on a particular theme could be viewed together. The analytical framework was refined after discussions within the research team.

Through reviewing of the coded data, the full range of views and attitudes described by young people and adults were systematically mapped, and the accounts of different participants, or groups of participants, compared and contrasted. Emergent patterns and explanations for young people, those with gambling problems and mental health problems were also explored. Verbatim quotes are included in the Results section below.

3 Results

3.1 Awareness and understanding of gambling activity

Before young people and adults with experience of mental health problems were asked about their awareness and perceptions of gambling marketing, they were asked about their understanding, awareness and experience of gambling itself. This section explores how these participants defined gambling, the ways in which they were exposed to gambling and their own personal experience of gambling activity. It is clear that exposure to gambling starts at a very early age and that a complex set of factors influences gambling awareness and activity.

3.1.1 What constitutes gambling

There was broad consensus as to the types of activity that constitute gambling. Participants gave many examples of gambling activities, most commonly scratchcards, lottery, betting on sports such as horse racing, football and boxing either in a betting shop or online, casino games, online games, fruit machines, slot machines and arcade games. There were two definitions of gambling. One view was that betting amongst friends was included under their definition of gambling, and the other, was a belief that gambling only applied when a betting company or organisation was involved.

In the focus groups with young people, participants were asked about their familiarity with a type of gambling associated with computer games where players pay for the chance to unlock items which will give them an in-game advantage or wager in-game items which have a real-world monetary value. Examples of these are loot boxes and skin betting in popular games such as 'Fortnite' and 'Call of Duty'. The only participants with awareness of this were male, aged between 13 and 19. There was a view expressed that these activities constituted gambling only when the items have a real-world monetary value. In scenarios in which the items had in-game value only, opinion was divided as to whether this was a gambling-related activity or not.

3.1.2 Exposure to gambling

The most commonly mentioned sources of exposure to gambling were through gambling advertising, family and friends. However, participants also spoke about the ubiquity of gambling in the environment around them, including the number of betting shops on their local streets, and the availability of lottery tickets and scratchcards in their local shops.

It was reported that gambling activity was normalised from a young age through frequent exposure to gambling advertising and observing gambling activities personally. Young people talked about gambling as a part of their family life. For some, betting on major sporting events such as the Grand National or football matches was a social occasion which brought their family together. Indeed, the influence of family members on awareness of gambling was mentioned in every focus group and interview, and participants most commonly identified family members when asked who

they knew who gambled. Young people were aware of their family members taking part in the lottery, buying scratchcards, going to the bingo, playing slot machines, or betting on sporting events by going to a betting shop, over the phone or online.

“My family have always done it since I was young, so I just never even thought of it as anything.” (YP FG 7)

“The national lottery. Everybody does that I think. Well, in my house, everybody I know does it: mum, granny, my dad.” (Young person group, aged 16-19)

Young people also spoke about having witnessed peers and friends gambling; this was more prevalent among those in the later teen and 20-24 age groups. Gambling activities which were reported as being common among people their own age were betting on sporting events, playing casino games on their phones, as well as buying scratchcards.

“I have quite a lot of friends who buy scratchcards. Stuff like that. They’ll go on games and stuff when they’re playing on the PlayStation, and bet stuff.” (Young person group, aged 14-19)

3.1.3 Personal experience of gambling

It was commonly expressed by those in the young people and mental health groups that engagement in gambling activities first took place from a very young age and often in a family environment. At the time, though, participants did not always recognise it as gambling. Examples of the types of engagement in gambling included:

- Choosing a horse to back in the Grand National and helping family members to pick lottery numbers.
- Playing on arcade games, slot machines or coin drop machines as their first experience of actively taking part in gambling activities with real money, most frequently when on holiday.

There was a perception amongst those who had experienced problems with gambling that this normalisation of childhood gambling laid down a pattern for more serious gambling in later life.

“When I was younger, they used to give us the newspaper when the horse races were on and tell us to pick out a horse and they’d like bet on it for us.” (Young person group, aged 16-19)

“I would choose numbers when I was about 6 which is probably not okay [laughter] but...Yeah I suppose it’s more of a...I always thought of it as you’re never going to win it...it’s a game.” (Young person group, aged 19-23)

“... it is not until you are a wee bit older you realise the arcade machines are gambling... So I think people just imagine gambling as like casinos and stuff, but it’s stuff we’ve been doing since we were really young. I think it just goes as you mature that the games get harder... the stakes are higher... So I think when you’re young it’s a matter of ‘can I win a teddy bear?’, but then when

you're older it's 'can I win a couple of grand'?" (Young person group, aged 16-17)

Regular gambling was not generally reported by the young people. Those in the younger age groups in particular professed to have no interest in gambling, describing it as 'boring' and a 'waste of money'. Despite this, specific instances in which these young people had gambled previously were given, such as buying scratchcards, betting on large sporting events or buying a lottery ticket. More common among the young people was betting amongst friends by wagering a nominal amount of money, or indeed other items, on the outcome of a game or event. Not unexpectedly, given the age range, only a few of the young people spoke about having been to a casino, and those who did spoke about this in the context as an opportunity to socialise rather than to gamble. Young people who were old enough to gamble spoke about their first experience of legal gambling as a rite of passage.

3.1.4 Perceptions of how and why people gamble

There was consensus across all participant types that gambling is easy and accessible. Participants spoke about the ubiquity of gambling opportunities, including scratchcards and lottery tickets in supermarkets and shops, online games and gambling apps. The increasing popularity of gambling apps was highlighted as an important factor in the accessibility of gambling as these apps are available 24 hours a day and remove the requirement to visit a betting shop.

"You can do it online though. And there are so many betting apps that you can get, you can play the games and that on your phone as well. You can bet with anyone on the phone, it's so accessible." (Young person, aged 19-23)

"It's literally like there's scratchcards and lottery places in almost every supermarket shop." (Young person, aged 15-18)

While young people were aware of the age restrictions on gambling products and activities, this did not prevent participation of those who were underage. Participants spoke about buying scratchcards while under the age of 16 as a specific example of purchasing age-restricted gambling products. Young people also spoke about lying about their age so they could take part in online gambling while they were under the age of 18. "...you can lie about your age and you can like do it and win money." (Young person, aged 12-13). It was reported that it was possible to circumvent age restrictions by ticking the 'over 18' box, and by registering a parent's bank card to an account in their name.

"Everybody has got their ma's bank details for the Xbox and that, you know what I'm talking a'boot, let's be honest here. A pound oot yer ma's account they'll not notice." (Young person, aged 16-17)

"I feel like that should probably be a requirement for apps like that because the only things they really ask are, 'Tick this box if you're 18'. Now, there's been plenty things apps asked me, 'Am I 18?', and I definitely wasn't 18!" (Young person, aged 14-19)

Reasons for gambling centered around the chance of winning, particularly in terms of risking a small claim for the chance of a large return such as the lottery, and the rush and adrenaline associated with gambling. There was also a perception that a positive aspect of gambling was the social element associated with bingo, which provided an opportunity for older people to meet up with friends. Participants also highlighted that gambling can be a source of charity funding.

“It's like adrenaline rush, and also it's the whole idea that you could get something really, really good out of it, and I think everyone wants to be lucky to a degree, so if you get given the chance, and you may be lucky, then you're gonna take it, aren't you? Well, most people would.” (Young person, aged 14-19)

“I suppose it can be a social activity as well, especially with sort of people with older relatives, and kind of the one thing that will get them out of the house every week is going to bingo, and it gets them out seeing people.” (Young person, aged 20-21)

3.2 Exposure to gambling marketing

3.2.1 Brand awareness

Young people across the age range of 11-24 years old reported seeing gambling marketing from a wide range of gambling companies. When asked to give examples of any gambling brands with which they were familiar, participants were able to name a large number of brands, without prompting. Across 10 focus groups, young people named 17 gambling companies that covered a range of different gambling activities including bingo, casinos, sports gambling and lotteries. Many of these brands were mentioned when asked to recall what gambling marketing they had seen. The most commonly cited examples were bingo companies such as Gala Bingo and Foxy Bingo, and sports betting companies such as William Hill, Paddy Power, Bet365 and Ladbrokes. Foxy Bingo was the only company mentioned in all of the young people groups. Examples of online casino games such as 32Red and Party Poker were also given as well as lottery brands such as the National Lottery and Postcode Lottery. Casino gambling companies were mentioned least frequently.

The types of gambling brands named were similar across the young people and mental health groups. Adults with an experience of mental health problems spontaneously mentioned eight gambling companies, whereas adults with an experience of problem gambling, as might be expected, cited the most gambling companies.

3.2.2 Brand recognition

Participants in focus groups with young people and adults with mental health problems were invited to take part in a brand recognition exercise where they were shown small sections of the logos of nine gambling brands and asked to identify them. Across the groups, participants correctly identified between six and nine of the logos, with an average of eight logos. As participants in a number of groups had indicated that they did not know many if any gambling brand logos, they tended to be surprised that they

were able to identify the gambling brands from only a snippet of a logo. Participants reported that they were aware of brands logos from television and online advertising, sports sponsorship and pitch side advertising, and from seeing betting shops in their local areas.

“You are always going to know the Ladbrokes, It’s like McDonalds, it is always there.” (Young person, aged 16-17)

“You see them all the time, so they will get stuck in your head, and that’s what they try .. They want that. That’s what they want to happen.” (Young person, aged 13-18)

“See I know that’s Coral but I’ve never even been to it, used it, I just know it’s called Coral. That’s bizarre.” (Young person, aged 19-23)

3.2.3 Where and how often people are exposed to gambling marketing

Television

Exposure to gambling marketing and advertising on television was mentioned frequently across all focus groups and interviews. Young people and adults recalled a wide range of gambling companies associated with advertisements on television. These companies included: Gala Bingo, Foxy Bingo, 32Red, William Hill, Coral, Ladbrokes, Paddy Power, Bet 365 and Pink Bingo. There was a view that particular channels such as ITV and Sky featured a large number of gambling adverts.

“I watch Friends on Comedy Central. Right after it, ‘Bet 32Red’ ...Directly, soon as it finishes. Cannae come on quick enough.” (Problem gambler group)

“There are like hundreds on ITV though. Like there’s loads.” (Young person, aged 19-23)

“Like see if you’re up late and you’re watching TV?, normally most o’ the channels on Sky is casino bets through the TV, so you have to phone in and place bets as well, so it’s on TV as well.” (Young person, aged 16-19)

Participants reported seeing gambling marketing on television because gambling companies sponsor a number of specific television shows. Examples from young people included ‘Jeremy Kyle’, ‘The Chase’, ‘I’m a Celebrity’ and ‘Celebrity Big Brother’. Foxy Bingo sponsoring ‘Jeremy Kyle’ was frequently cited by both young people and adults with an experience of mental health problems.

“Gala Bingo sponsors The Chase actually. And it’s like the adverts that are for gambling that sponsor game shows, it’s like they’re gonna stick in your head ‘cause game shows are really popular.” (Young person, aged 13-18)

“I feel like TV show sponsors are one of the most significant for me...Is it actually Big Brother they were sponsored by Pink Casino?...Celebrity Big Brother!” (Young person, aged 19-23)

"[Foxy Bingo] It's advertised every morning, before Jeremy Kyle." (Mental health group 1)

Gambling marketing in sport

Exposure to a range of gambling marketing and advertising while watching sport on television was mentioned by all participant types. Gambling marketing was said to be visible on television via shirt and team sponsorship, pitch-side and ringside advertising, and during commercial breaks. The gambling companies participants recalled advertising during sporting events included: Bet365, SkyBet, William Hill, Coral, Ladbrokes, Paddy Power 32Red, Betfair and Betway.

"I watch a lot o' sport, and the advertising of gambling during sports is so monotonous, it's just shocking." (Mental health group 2)

"They advertise everywhere, on the side of football stadiums, on the sides of [boxing] rings, everywhere. Anywhere there's a sports sign there's a betting sign. 100% guaranteed." (Young person, aged 16-17)

"I would say, I watch football games on the TV and the one I'm noticing more and more now is during the halftime or leading up to a game, or just at kick off and it is constant on the barriers around the pitch. Just bombarded with it now." (Problem gambler interview 3)

Online

In addition to exposure to gambling marketing on television, all participant categories stated that they were exposed to online gambling advertising. Both young people and adults recognised that gambling companies had an active online presence and because (particularly young) people spend a lot of time online, they are inevitably exposed to the marketing. Examples included: Paddy Power, Betfred, Foxy Bingo, Mecca Bingo, Gala Bingo, Tombola and Bet365.

"The rise of the internet has massively expanded your opportunity to gamble. You don't have to leave the house to do it." (Mental health group 2)

"The internet. Internet's the biggest one I think because you're constantly there." (Young person, aged 15-18)

"Most of them [gambling companies] have got online places...The only one [I remember] is the 888 gambling one, but the thing is like they all have similarish names..." (Young person, aged 14-19)

Social media

Young people most commonly reported seeing gambling adverts online when they were on YouTube and Facebook. Gambling adverts were said to pop up on YouTube in between young people watching videos. Participants reported seeing Paddy Power, Betfred, Bet365 adverts on, for example, YouTube, whereas others just remembered that there had been gambling advertising. On Facebook, young people recalled gambling adverts appearing in the advertising banner or popping up to promote companies such as William Hill, Ladbrokes, 32Red and Party Casino. Fewer young people reported seeing gambling adverts on Snapchat and Instagram.

“When you're on YouTube or something, you get random advertising that you have to watch for at least 6 seconds...you can just kinda tell by the logo what they are.” (Young person, aged 14-19)

“Social media’s quite big for it. On Facebook, quite a lot o' the time I see articles popping up. I think it's like ‘Lucky Spins’ or something, the website, and it's like ‘Oh, and you can click on this site to get 100 free spins’.” (Young person, aged 13-18)

“Like we're forgetting as well but like online advertisements, ‘cause see the past couple of days when I've been scrolling through Facebook and stuff like that, it's come up with like William Hill ads. I've never used William Hill, ever .. on my phone anyway, or on my laptop!” (Young person, aged 16-19)

Adults with experience of mental health problems or gambling problems also reported seeing gambling marketing online. Some felt this was unsolicited while others said they had gambled online and then found gambling adverts popping up while on social media.

“There is quite a few if you're online. For example, if you're on Facebook, you do get adverts that come up promoting betting...in terms of gambling, I've been out maybe the night before, put a couple o' pound on, and then for some reason .. or even if I've done it online, you then go on to Facebook, the first thing that comes up in an advert is gambling.” (Problem gambler group)

“Well, with Facebook and Twitter, when I was opening accounts and had accounts, I was just flooded by it. If I'd go on my Twitter page and my Facebook page, there'd be a new offer to open an account with a new company, so that'd be constant.” (Problem gambler interview 4)

Access via games and phones

Participants from all categories had been exposed to gambling marketing when accessing the internet or playing games via their phones. Again, some had noted specific adverts from a gambling company, whereas others were aware that it was gambling-related advertising from a range of different businesses.

“It gets on your phone...All the previous (ones) mentioned, like Ladbrokes, William Hill, Paddy Power etc.” (Young person, aged 18-23)

“See if you're on your phone watching the news, adverts'll pop up trying to get you to .. On my phone, it seems to be Betfred.” (Problem gambler group)

“Even some o' the apps on your phone. You know how you can get the games – the apps on your phone? – and it's like bingo or ... roulette, or fruit machines. It's everywhere. It is everywhere, even in a game on a phone.” (Mental health group 1)

Gambling companies which participants follow online

No participant in the young people groups reported following gambling companies online. At the time of interview or groups discussion, it also wasn't common amongst the adult participants to follow gambling companies online. However, those who had

experienced problems with gambling stated that they used to follow gambling companies on Twitter and Facebook.

Local community

Young people, adults with experience of mental health problems and adults with experience of problem gambling recalled seeing gambling advertised in numerous locations in their communities, discussed further below. A wide range of gambling companies were mentioned in recalling advertising that has been seen in the local community.

Gambling venues

Seeing betting shops or “bookies” in town centres was spontaneously mentioned by participants in every focus group and interview. It was argued that they were more prevalent in relatively deprived areas, and that they did not have such a presence in affluent areas. They were described as being brightly coloured, attractive with prominent promotions in their shop windows. Participants also recalled seeing other gambling venues in their town, such as casinos, arcades and bingo halls.

“Just walking down any High Street, you see so many betting shops, but in a way that’s the advertising in itself. They’ve got much cleverer about putting it in the windows and really branding that, where you would have put maybe the odds or you would have curtains or something in the old days.” (Mental health group 2)

“You just walk round the corner... There’s four I think it is in a row, all next to each other. There’s no other shops. It’s just a whole chain o’ bookmakers competing against one another.” (Problem gambler group)

“You can just see William Hills on almost every street, so, at a certain age, you realise what they actually are.” (Young person, aged 14-19)

Shops and supermarket

Young people across the 11-24 age range reported seeing gambling marketing in local shops and supermarkets, mainly in the form of scratchcards and lottery tickets. Young people had seen displays in windows, shop floors and at tills. These displays were often sited near the point of sale, and were perceived as being attractive, alluring and difficult to ignore.

“Sometimes like the Lottery one, there’s this like kind of... a sign kind of thing that tells you that they’re selling them inside, so it’s like saying what it is and how much it is and that and then you go into the shop and buy it.” (Young person, aged 12-13)

“I’d say scratchcards are usually right at the front, like at the desk, you know?, so like say you’ve done all your shopping, you’re gonna get there, you know, especially with someone with maybe a gambling addiction, if they’ve got that extra money there at that desk, it’s like, ‘Oh. It’s right there!’” (Young person, aged 14-19)

“Inside shops because you’ve got the Lottery stand thing... I think it’s mostly the Lottery because you get that in like corner shops, big shops, the big Asda and

stuff like that. So I think the Lottery is the biggest one in the shops.” (Young person, aged 16-17)

Billboards and bus stops

It was less common for participants to mention seeing gambling advertising on billboards, bus stops and on buses spontaneously. Only when asked directly did both young people and adults give examples of gambling adverts they had seen on billboards. The gambling companies cited as advertising on billboards included: Bet365, Betfred, SkyBet, William Hill and Ladbrokes. The gambling companies mentioned for advertising at bus stops or on buses included: Bet365, Betfred, Ladbrokes, Paddy Power and the Lottery.

“I’ve seen billboards with them before...I think it was Bet365, but I could be wrong. But I’ve definitely seen at least one on a billboard in the town, across from me, ‘cause it’s a huge ASDA and Morrisons and stuff, so they stick it outside there.” (Young person, aged 20-21)

“Betfred is a popular one; I think that I’ve seen on billboards.” (Mental health group 2)

“I think the Bet365 one that’s always in there...it’s in the bus stops...Well I don’t go into town very often but when I am I think that’s where I see it.” (Young person, aged 12-13)

Other marketing sites and modes

Young people spontaneously raised a number of other places or ways in which they had been exposed to gambling marketing and advertising. These included letter drops through their front door, in newspapers, emails, texts and signs on the high street. As a result, it was said by the different participant category types that gambling marketing was pervasive.

“Because it’s basically advertised in all your local shops that sell you. It’s all around in the town an’ that. You’ve got your bookies, you’ve got your bingo, you’ve got your scratchcards, the lottery tickets an’ all that. They’re everywhere.” (Young person, aged 16-19)

“You see it everywhere...you could be sitting, as I say, watching the STV news, [and] the next advert’s gambling. Read the newspaper – like the adverts earlier on – ‘Bet £10 tonight. Win £70.’ It’s everywhere. You cannae hide from it.” (Problem gambler group)

3.2.4 Frequency of exposure to gambling marketing

Not only did young people and adults report seeing gambling marketing in a wide range of places, they recalled seeing it at all times of day, though the gambling activity varied dependent on the time of day. For example, bingo adverts were thought to be on throughout the daytime and early evening, whereas casino and roulette adverts were frequently screened late at night. Participants argued that gambling adverts are aimed at reaching as large an audience as possible, which is why they sponsor popular television shows, and are on before, during and after major sporting events.

“And they play it on the TV at the right times. They always pick the most busiest time when folk are having their dinner – maybe like 6, 7 o'clock – and they'll put it in between when folk are watching their favourite programmes, such as like Coronation Street, The Chase or something.” (Young person, aged 16-19)

“[On during football]: Obviously, purely it's because o' the amount o' people that is gonna like see them, that's how they're on there.” (Problem gambler group)

3.3 Features of gambling marketing

3.3.1 Main themes and features used to market and advertise gambling

Participants identified a number of key features from gambling marketing and advertising that they were aware of and were able to give their opinions on what made the marketing memorable, nondescript or unappealing. Some features identified are commonly used in a range of marketing (such as use of colour, characters and catchy songs) while others were unique to gambling (for example promoting winners and offers).

Memorable songs and catchphrases

Young people across the age range, adults with experience of mental health and adults with gambling problems thought that gambling television adverts with catchy songs and catchphrases were notable, though this did not necessarily equate to individuals admitting to like these jingles or adverts. Foxy Bingo, Gala Bingo and the Postcode Lottery were commonly cited examples.

“They have wee catchy sing-songs basically, coz like one comes to mind it's like FoxyBingo.com. It's like [singing jingle] 'FoxyBingo.com'. Like you always remember that. You'll always remember it for years to come.” (Young person, aged 16-19)

“There's one that's really bad on at the moment...it's this lady dancing about in a field and singing 'are you going to bingo?' Things like that. Like...yeah that's stuck in my head.” (Young person, aged 19-23)

There was a commonly-held perception that gambling marketing intentionally uses catchy songs and catchphrases in order to aid recall after the advert has finished, to encourage future gambling. In addition, participants thought that catchy songs were particularly attractive to young people and were able to give examples of the allure of this type of marketing to the young.

“See all the catchy tunes? – it does get stuck in your head. I mean I know my wee cousin was singing the Gala Bingo advert ever since it started, so it gets annoying after a while, but it does stick. And it's stuff like that, it's like that entices people in because it's so catchy, and it's like, 'Oh, actually, that would be good to play 'cause it's such a good theme tune'.” (Young person, aged 13-18)

“last night I was sat with my 7 year old son and...the advert comes on and he knows the words to it...I know it doesn't mean anything to him but the slogans and what they say they make it catchy so people remember and like I say he's 7 and he can remember it and he joins in and says the words... it just makes my stomach turn – I just felt a little bit disappointed really that somebody from such an early age is picking up on these things.” (Problem gambler interview 3)

Memorable characters

Songs, jingles and catchphrases were not the only feature of gambling marketing that the participants recalled in the adverts they had seen. They also remembered the characters that were used in marketing campaigns and adverts. The character young people across the 11-24 age range and adults with mental health problems cited most frequently was the fox in the Foxy Bingo advert. Participants described the character as being “cute”, “adorable” and “funny”, and also spoke of its dancing. Across all participant categories, characters from Paddy Power, Gala Bingo and the National Lottery were also cited as being memorable.

“In my head I can see a fox walking down the street dancing...and he's interacting with everybody going down the street.” (Young person, aged 19-23)

“Some o' it was like joking. The person that was playing the fox like took his big head thing off and started talking to someone else.” (Young person, aged 11-12)

“I can remember a man with a fox's head on encouraging me to gamble.” (Mental health group 2)

“Well I know the Paddy Power one is the Irish guy, it's his face 3 times, it's like a slot machine.” (Young person, aged 12-13)

“Well, that Ladbrokes stands out coz there's always that spaceman jumping about. He annoys me!... they all stand out coz I remember 'em all. I remember seeing the actual company, but I don't remember the content of the advert.” (Problem gambler interview 2)

Celebrity endorsement

As well as describing striking and attractive characters, those in the young people, mental health and problem gambling focus groups and interviews remembered marketing that utilised celebrity endorsement. The examples that were cited included adverts for Gala Bingo and Bet365. This endorsement was thought to appeal to and attract the celebrity's fans, as well as making the promotion more authentic and memorable.

“D'you know what else is always stuck in my head is that woman, Peggy, fae Eastenders, is it? ... in the bingo advert wi' the big dress...Gala Bingo. That was it. See, that's always stuck in my head – her wi' that big star thing and the big dress...” (Young person, aged 16-19)

“Yeah because if you see your favourite player with Mecca Bingo on them: ‘oh they like that so I like that’.” (Young person, aged 19-23)

However, although adverts featuring celebrities were reported as being appealing or memorable, they were also disliked strongly by participants; either because they did not like the celebrity featured or that they did not like that the celebrity was endorsing gambling. It was also acknowledged that these adverts were difficult to forget or ignore as a result.

“I think one o' the best ones I've ever seen, that personally catches my eye, is there was one back ages ago...It was like Mario Balotelli...He was in it, and I think it was for Bet365 or something, and there was just him dodging football players and hitting a shot, and then a guy came in front o' the goal, just as it was about to go in, and he said like a big speech about 'How do you know that's gonna go in?' or something, and then it was like, 'Bet365. Take your chance'. That was probably one o' the best adverts I've ever seen.” (Young person, aged 15-18)

“Well, the one that kind of gets in your brain is Ray Winstone. I think it's Bet365. That's the one that just kind of ear worm almost. Doesn't leave you alone...It's his big fat face and his Cockney accent just winds me up!.. I know nothing about the guy, but my impression is he must be like a millionaire because he's a very famous Hollywood actor, and it just irritates me that he chooses to do that.” (Problem gambler interview 4)

Humour

Gambling marketing that used humour appealed to all participant categories and was thought to be popular more widely. The young people reported that humorous adverts aided recall, made gambling seem less serious and therefore a more acceptable activity. For example, the young people cited the Foxy Bingo advert as using humour positively.

“I was a kid when I first started seeing that [Foxy Bingo advert], so I just thought it was funny, and then I was like, 'Oh, cannae wait .. cannae wait till I'm old enough to play that.', and then forgot about it coz I don't watch telly anymore!” (Young person, aged 16-19)

“I suppose some of them, I didn't think of it before until now, it's sort of making it humorous rather than serious...The fox one...when I thought of that I thought it was funny because I could see the advert in my head, and I suppose gambling is quite a serious thing. But you could see that more through William Hill or Coral. Whereas that one is trying to make it funny, so it's okay to do it.” (Young person, aged 19-23)

Adults with experience of problem gambling argued that some of the adverts deliberately downplayed the actual gambling activity at the expense of humour, but they lingered in the mind and could potentially influence gambling behavior in the future. The Paddy Power advert featuring Ryan Giggs's brother Rhodri Giggs was given as an example of this.

“Because like the latest one – with this Ryan Giggs one – they don't mention betting once really. I think he's [Rhodri Giggs] a new ambassador for Paddy Power, and it's about like 'Loyalty doesn't get you anywhere. Only rewards does', and he's become like the rewards ambassador, and he's like driving off in

his Paddy Power sports car, but .. Coz his brother, Ryan Giggs cheated on him... and that's what the advert's about – how 'Loyalty gets you nowhere. It's all about rewards', and he's the new Paddy Power rewards ambassador kind of thing. But it's sort of clever, so I can remember that, but it's not actually saying like 'Spend £10 and you'll get this reward' or 'You'll get that'. It's sort of more subtle really. I guess you'll sort of think about it later on maybe.” (Problem gambler interview 4)

Use of colour

Young people spoke about gambling adverts being “bright and colourful” (*Young person, aged 20-21*). Participants in all the categories perceived that the bright colours made them attractive and appealing, with a view expressed that they could be especially attractive to younger children. This feature was not limited to adverts on television or online, with betting shop fronts, billboards and point-of-sale lottery and scratchcard displays all reported as using eye-catching colours, designs and presentation.

“I also like the William Hill logo 'cause it's a good colour on it.” (Young person, aged 18-23)

“They're [scratchcard and lottery displays] different colours and everything like that. They do stand out, you know? It's not something that you really miss when you go in to the shop!” Young person, aged 14-19)

“It [Health lottery advert] was quite bright and vibrant. It kind of drew you in a little bit.” (Young person, aged 15-18)

Promoting winners

Gambling marketing that featured members of the public winning also appealed to the participants and was a feature that is unique to gambling marketing. It was thought to be more authentic to have ‘ordinary people’ winning large prizes, and participants said that seeing people like them winning encouraged people to gamble in the hope of replicating this success. Participants noted the absence of people losing in gambling adverts gave the impression that people frequently won.

*“There's that Lottery advert...and all the people come out the door and it's like happy families that have just won like £15,000 and you're like oh, that's so sweet!...The *Postcode Lottery. Yeah that's it. You're like that's so nice, that woman has been betting for like maybe 20 years and she's finally won! Even though she's been putting a tenner on like every week, it's kind of like, that's good... Yeah, it's seen as a positive thing when it's kinda not.” (Young person, aged 19-23)*

“I would be tempted, Postcode Lottery...I'm not in to gambling. I'm not really in to the Lottery...I think it's the advert. They just show people winning all the time...you see them knocking on the door. And all these big wins. They can be anything from £35,000 to £135,000...it appeals to me. The advert appeals to me.” (Mental health group 1)

Promotional offers

Marketing that promoted special offers and deals were perceived to be particularly appealing to participants. Examples included marketing that promoted the chance to win a large amount for a small payment, such as a lottery, as well as offers of 'free money' when individuals sign up to a website or place a bet. Promotion of free bets, free money or free spins were thought to have the potential to encourage those who had never previously gambled to participate in a gambling activity. Promotional offers were mentioned frequently by both young people and adults who had experienced problems with gambling.

"That's so easy...all your daein' is paying £2 or something like every month and then you get the chance to win so much, and obviously everybody's gonna dae that. You're paying £2 to win £25,000." (Young person, aged 16-19)

"And they're offering you free money as well now, aren't they, on some of the adverts...It's like £20 for £20 spend." (Young person, aged 16-19)

"I think things like the 'Join for 22 free spins' attracts people that aren't pro-gambling, but think, 'if it's completely free, I might as well just try it, and then, after doing that, you might buy another hundred spins or so.'" (Young person, aged 14-19)

"I'll tell you another one they do at Betfred, they gie people money to go and play the machine every day – maybe a fiver or tenner...It's a bonus...but it's just to get people to keep coming back and back and back. It's just another promotion to keep somebody coming every day. You might get £2, you might get £10, and they just dae it. It's more promotions." (Problem gambler group)

It was not only financial incentives that were the subject for promotions. For example, casinos were said to offer free drinks if a bet was placed, and problem gamblers spoke of staff within betting shops offering them tea and sandwiches in order to get them to stay in the outlet.

"... I'm signed up to the casino,.. to get you in, they'll say, 'Oh, if you come and join or you come and place a bet, we'll gie you a free drink'...It was just one o' these nights we were out. It's the only place that sells alcohol after midnight instead o' going up toon, so me and my pal went in. To get in, you need to sign up as a member. They're annoying actually. They are. They're very annoying to be a part of, 'cause they email me every day – 6 or 7 emails a day." (Young person, aged 15-18)

Finally, good gambling deals or odds also made gambling marketing memorable across the participant types. Participants stated that betting odds were often time limited which made them appealing because people wanted to place a bet before the odds changed and were not as favourable. Adults who had experienced gambling problems mentioned complex odds in marketing. These were not commonly mentioned by the other participant types.

"William Hill. 'Cause I seen the posters on the window. See how much you can put a bet on." (Young person, aged 18-23)

3.4 Perceptions of gambling marketing

Participants shared their reactions to gambling marketing, what they believed the message adverts were trying to get across and whether they thought this message was true. They also discussed who they thought the key target groups for gambling marketing were.

3.4.1 Negative reactions to gambling marketing

Across all participant groups, people reacted negatively to gambling marketing and advertising.

Disinterest

Young people across the age range of 11-24 said that they were disinterested in many examples of gambling marketing, many of whom also stated that they were disinterested in gambling. This ranged from those who were reacting to the perceived ubiquitous nature of the advertising to those who stated that they were barely aware of gambling marketing. Those who did not like gambling adverts in this way said that if adverts came on they paid little attention to them or would change the channel to avoid them. However, negative comments about marketing more generally, not exclusively gambling marketing, were also received. This view was reiterated by adults with experience of mental health problems.

“I’ve seen adverts like that all the time, and again and again, and it’s just so repetitive and monotonous.” (Young person, aged 15-18)

“I don’t not like them, but I don’t really have any interest in them.” (Young person, aged 14-19)

“To be honest with you I cannae even remember one video, not one advert that’s for gambling.” (Young person, aged 16-17)

Gambling adverts were also said to be so commonplace that they had become an accepted and normal part of viewing programmes on television or being online. However, even if individuals thought they were able to ignore these adverts, it was also argued that they were entering the subconscious and were actually very difficult to avoid completely.

“It doesnae really make any difference to me now because they’ve been on TV since I was a baby, so they just become normality as soon as one comes on...It’s like when they first come oot, they make you feel like, ‘Oh. I’d better go and dae something about it, or better go and bet a bet’ or something like that, but now that they’ve been there for so long they’re just like a day-to-day thing.” (Young person, aged 15-18)

“I don’t think you really recognise them, your subconscious takes it in, you don’t consciously look at it and been like ‘oh there’s a betting thing up there’.” (Young person, aged 16-17)

“There's a lot o' subliminal stuff. Yeah. Never quite sure. I think I ignore it because my addictive personality does not want to know anything about betting.” (Mental health group 2)

Annoying and intrusive adverts

A commonly expressed reaction to gambling marketing among participants was annoyance and irritation. This could be because they disliked a character in an advert, or a song or tune used to promote it. The lady from the Sun Bingo 'Are you Gonna Bingo' advert was a common example given.

“Oh, I just cannae stand the woman. That would put me aff.” (Mental health group 1)

“Really, really cringy, really bad but I think that's why I remember it because I think I suppose they didn't make that advert thinking 'that's the best advert, we'll put that out there because it's really good'. I think it's more that will stay in someone's mind because it's so bad.” (Young person, aged 19-23)

Young people expressed the view that gambling adverts popping up while they were watching videos or playing games were particularly annoying. They added that online gambling adverts were obtrusive because they would appear unpredictably and would be difficult to close, which was deemed to be off-putting. The perceived high frequency of gambling adverts was also described as unappealing.

“It usually comes on before YouTube videos, so it just means I have to wait 30 seconds before I get to watch it, so it just annoys me.” (Young person, aged 13-18)

“They're just constant. It's like, 'Oh, play this. Play.', and I'm like 'Go away'.” (Young person, aged 18-23)

“It's just so forceful that I just think like that gambling business is forcing you to do it, so it's like they're trying too hard I think, and that can be quite unattractive in the sense that it just repels you from the idea a little bit.” (Young person, aged 13-18)

Tempting people to gamble

The fact that gambling marketing was viewed as encouraging people to gamble, even those with no interest in taking part in such activities, was viewed negatively. Problem gamblers were particularly wary of such promotions, which they thought were aimed at enticing them back to participate in a harmful behavior.

“I don't like them. I instinctively don't like gambling adverts because they're trying to play on my addiction, so I try not to pay any attention to it to be honest, but it probably is affecting my subconscious in some way.” (Mental health group 2)

“I've never liked them coz I know what they were there for. And even when I was in, I knew I was gonna lose most o' the times, but I'd still dae it, but I knew

what they were there for – just to get your money off you.” (Problem gambler group)

3.4.2 Positive reactions to gambling marketing

Few positive comments about gambling marketing were elicited. As has been mentioned previously, participants could find adverts that used humour or celebrities appealing, or at least easy to remember. There was also a perspective that marketing from gambling companies featuring money benefiting charitable causes could also make it seem to be more worthwhile.

“Probably the National Lottery, coz it can do a lot o' things for people. Like this is funded by the National Lottery, isn't it?” (Young person, aged 18-23)

“Well, coz it's like the Health Lottery and it's saying that it supports loads o' UK charities, and it's kinda thinking 'Oh yeah. I'll put money in, and it's gonna help people. It's gonna help charities, but I also might get something back', so it's kinda good either way; if you don't win, you're still giving your money to charity. So people might think it's .. it's still gambling, but it's not really gambling since they're giving some o' the money away to the charities.” (Young person, aged 13-18)

3.4.3 Perceived message of gambling advertising

Gambling presented as fun and sociable

Young people across the age range of 11-24 thought that gambling marketing presented gambling as a “fun”, “cheerful”, “light-hearted” and sociable activity (YP FG 3). This was a perspective reiterated by the adults with experience of mental health problems, who also stated that some adverts made gambling appear to be glamorous.

“Well, it's saying it's really fun, it can bring you happiness. And they use two couples in it, which kinda says like 'oh, it can also bring love or bring you closer' or something.” (Young person, aged 13-18)

“It comes across as very harmless. It's just a game. They try to detract from the fact that it's gambling, and you could lose money.” (Young person, aged 20-21)

“And it sounds kinda glamorous, doesn't it?...Well, it's always... in films and stuff, isn't it? In the James Bond film, it was always the casino and stuff like that.” (Mental health group 1)

A common perspective across all participant groups was that gambling adverts were trying to encourage everyone to gamble, and that participation might lead to a sizeable win. Both young people and adult participants claimed that portraying gambling in this way is aimed at enticing people to gamble. There was also a view expressed that gambling companies were using marketing to encourage irresponsible gambling.

“That it's like fun to play it, and that everyone should be playing it.” (Young person, aged 13-18)

“It’s to get in to your emotional psyche and to make you think, ‘Oh, I must do that. That looks really good. I’ll have to go and have a look at that and see what it is, see what’s going on.’, because they want to get on to your emotional side and see what’s going on in there.” (Mental health group 2)

“It’s a promise. It’s like it’s giving you .. It’s telling you, ‘If you play this, we’ll .. I definitely make you rich.” (Young person, aged 15-18)

“They try and rope you in, and then that’s how they start. These adverts, they try and rope you in and make them look good.” (Young person, aged 16-19)

“They’re just trying to target you to gamble. Just you gamble more and more. That’s what they want you to dae.” (Problem gambler group)

“I get a lot of emails from gambling companies as well...If you manage to stop gambling for a while, you will be bombarded with emails offering you free offers and bets and little tempters and things to draw you back in.” (Mental health group 2)

Marketing messages

The consensus among participants was that the messages portrayed in gambling marketing were not true or realistic. For example, young people did not think that gambling was as sociable an activity as the adverts made it appear. Also, the participants stated the reality was that a major gambling-related win was unlikely, but this was not depicted in the marketing. Similarly, it was said that the adverse effects that can result from gambling were ignored completely by its marketing.

“It makes it look appealing because there are people sitting outside and socialising and that’s not actually how it is...it shows people sitting around the fire with their phones playing bingo and it’s not like that...It’s just like...doing it online in your house, you don’t really go out and socialise anymore”. (Young person, aged 12-13)

“They false advertise the chances of winning. It’s like, ‘Oh. One in ten’, when really it could be one in ten thousand.” (Young person, aged 16-19)

“I don’t really like lottery ads – like the Postcode Lottery – where they go to someone’s house and hand them a really big cheque. I think that can be quite misleading... it’s just quite vague and I think it misleads people to think that’s gonna be what happens to them.” (Young person, aged 14-19)

“You’ll no see an advert for example an advert just now wi’ people that are affected by gambling. You never see anything negative...and I think that would be a good thing as well. I don’t think it would be welcomed.” (Problem gambler group)

The minority view was that there is some truth in gambling marketing, as people will win on occasion.

“There’s some truth because you might win. There’s some truth to it because you might win, you might not...but it’s like you’re not guaranteed. So, it’s not

*technically false advertising, but it's not technically true advertisement either.”
(Young person, aged 13-18)*

3.4.4 Relevance of marketing to young people and vulnerable groups

The young people tended to argue that gambling marketing was not relevant to them personally, either because they said they were not interested in gambling or because they thought they were not its main target group. However, young people did believe that gambling adverts had the potential to appeal to young people, and indeed that some gambling marketing is targeted with young people in mind. Participants also reported that gambling marketing can be targeted at different groups dependent upon its nature and the likely demographic audience. There was consensus across all participant types that because gambling marketing is so voluminous and varied that, overall, gambling marketing is trying to appeal and be of relevance to everyone in some form.

Age

All participant types thought that examples of gambling marketing were particularly targeted at young people. Adverts that were described as colourful, glamorous or fun were believed to appeal to young people. Adverts for gambling apps or adverts on late at night were also said to be appealing to young people (mid to late teens to those in their 20s) because of the format they used and the time of day they were marketed.

“I suppose if they try and make it fun and snappy then they're looking at younger people.” (Mental health group 2)

“The casino ones are definitely glamorous... and I think they're aimed more at the younger ones.” (Mental health group 1)

“Lots of the games kind of look like mobile phone games, so I think it's sort of attracting the sort of people who use smartphones and like millennials and that sort o' demographic...probably 18 to 32. Kind of like 20s.” (Young person, aged 14-19)

Some of the gambling adverts that were thought to appeal to young people were not thought to exclusively appeal to this age group. Participants perceived bingo as an activity to be popular with older adults, so while adverts like Foxy Bingo were attractive to young people, they would also appeal to older generations who are more likely to play bingo. Therefore, by combining elements that were attractive to different age groups, gambling marketing could appeal to a broad age range.

“Aye probably the Foxy Bingo advert [appeals] to kids, it's an animated fox talking. It's not as if it's not going to appeal to young people.” (Young person, aged 16-17)

“[Foxy Bingo] appealed to me when I was a kid, coz foxes are cool.” (Young person, aged 16-19)

“Well, for the bingo adverts, that would actually probably appeal to the older generation because I know for a fact my wee great granny just loved to go to the bingo on a Thursday night.” (Young person, aged 13-18)

Gender

Participants perceived that some gambling activities and marketing appealed more to a specific gender as well as a specific age. For example, it was stated that sports gambling tended to be aimed towards young men who liked sports such as football. However, there was a view that some gambling marketing appealed to a particular gender across the age range, and therefore could be attractive to men or women, young and old.

“I would have said guys my age coz they tend to follow sporting events a lot more. I know a few people when I was in school – so I suppose 17 or 18 – they would go down to Ladbrokes after school, and I know some people that actually work in there now and then bet in there.” (Young person, aged 20-21)

“I mean it's definitely... a young male market, market who are in to football, ... who are in to going to the pub with their mates, having a few drinks watching the match.” (Problem gambler interview 4)

“I think the bingo ones often feature a lot of happy-looking women, so I guess that's trying to promote this ‘We're a community of happy women. Come and join us and you'll have a great time’.” (Mental health group 2)

Sports fans

Participants shared the view that gambling marketing was often specifically targeted at sports fans. This was often associated with specific gambling brands like Bet365, Paddy Power, William Hill and Ladbrokes, who were able to focus on a particular sport or indeed sporting events. It was stated that these adverts were appealing to all ages, including young people, though some targeted sporting adverts may appeal more to men than women.

“It's aimed at people either watching the game or .. To be honest, it can be aimed at all ages because, even at that age, I was captivated. I was maybe 14, 13, and I was captivated.” (Young person, aged 15-18)

“Me and my flatmate always gamble when it's like big events, like you know that fight with Conor McGregor things like that, or like what's the horse racing called?... Yeah the Grand National, things like that, you're kind of encouraged to do it, just because it's so popular and everyone seems to do it, so you just join in with the run, the hype.” (Young person, aged 19-23)

Social class

Targeting of gambling marketing by social class was also reported by participants. As such, it was said that working class accents featured in specific adverts, such as the Bet365 adverts with Ray Winstone. Betting shops were also said to favour working class areas, and indeed the lack of them in affluent areas was commented upon.

Participants also described this targeting as relating to finances and disposable income, with adverts seeking to influence the relatively affluent.

“I find there's a huge number of what I would call 'working-class' accents used in the adverts, and I don't know if that's because that's the target market for the stuff that I happen to see.” (Mental health group 2)

“Definitely working class people.” (Young person, aged 15-18)

“[Sky Vegas] It has a certain feeling of affluence about it...because you've got the nice décor in the background, and the man shown on it is well-presented, and it's not brash.” (Young person, aged 20-21)

“[Sky Vegas] I think more upper class, more disposable income.” (Young person, aged 19-23)

“The Sky Bet is like so popular with people the same age as me. Maybe it's just like my friend group...Yeah I'm 99% sure that they have all used that Sky Vegas at least once.” (Young person, aged 19-23)

People at home during the day

Both young people and adult participants thought that because a lot of gambling adverts are on television during the day (often sponsoring specific shows) that they target people that will be at home during the day. These people were described as stay-at-home parents, older adults, unemployed or part-time workers or people with physical or mental illness.

“I'd say people who are most likely to be home in the afternoons, probably not working, but then that's not very nice to do, to try and tempt them in like that...” (Young person, aged 20-21)

“They don't seem to actually feature them, but they actually do attract a lot of older people who are now retired or are at home stuck in a situation – maybe a physical illness ... where they can't go out as much, or a mental health issue.” (Mental health group 2)

“... it's on after Jeremy Kyle, which is on at 12 o'clock in the afternoon or something, so, realistically, who's gonna be watching it? It's gonna be either stay at home mums or stay at home dads, or grannies or granddads.” (Young person, aged 15-18)

Aimed at people who are gambling

The participants also thought that gambling marketing was targeted at those people that already engaged in gambling-related activity, and on occasion at those with gambling problems. This is explored in detail in Section 3.5 below.

3.5 Participant perceptions of impact of gambling marketing

3.5.1 Impact on knowledge and attitudes to gambling

No clear consensus emerged when the participants were asked what the overall impact of gambling marketing was on people's knowledge of, and attitudes towards, gambling. The most prevalent view was that the marketing normalised gambling, made it seem like an everyday activity and also promoted the view that it was both harmless and enjoyable. As a result, it was also reported as being disingenuous and manipulative, as the likelihood of winning and any detrimental effects were not shown. These participants tended to think that this marketing approach did have some influence on people's knowledge of gambling, and by making it appear a 'fun' and 'social' activity it made it more likely that people would gamble. It was also argued that marketing more generally was misleading and manipulative, but while tobacco and alcohol marketing now faced restrictions, similar restrictions did not apply to gambling.

"...[gambling marketing] makes it seem as if , 'Oh, no. Everybody does it. Everyone's doing this. You should do it too.', so it kind of just makes people think, 'Oh, well. If it's a normal thing, then why not give it a go?'" (Young person, aged 13-18)

"I think it normalises it for people... It feels like it's just a normal thing that people do, and it's just easy, and it's not like .. you can almost get caught up in it and not think of it not really as much of a vice so much, compared to, say, smoking has become a vice, I'd say, in the public eye. Gambling, it's not really got that, I don't feel... it's only recently really that people are starting I think to feel like it's a massive issue, massive problem, and I think... advertising's making it just look like a bit o' harmless fun." (Problem gambler interview 4)

While those who had experienced problems with gambling agreed that gambling marketing was misleading, emphasised positive aspects of gambling and had the potential to influence individuals, they also stated that frequent gamblers possessed a lot of knowledge already, and that the marketing might act on a number of levels. For non-gamblers or infrequent gamblers with little gambling knowledge, it may increase the likelihood of them, for example, placing an initial bet. However, for frequent gamblers, it was thought that adverts and promotions acted as reminders that a big game or major sporting event was coming up, or specific offers would entice them to gamble once again. Staff in bookmakers were also said to promote gambling opportunities actively, even if they knew that the individual they were approaching had gambling problems. Problem gamblers could react very negatively to gambling marketing, especially if they perceived themselves to be targeted despite the fact that they had known issues with gambling.

"What I mean is it can affect the people and it can make them gamble. Definitely. Yeah. Because like for instance, again referring to them specials on, say, first goal-scorer, somebody who's never gambled might think, 'Oh, Sergio Agüero – first goal scorer. Oh, I know him. He scores every week, so why don't I have a bet?', or, again, people who have gambled and see it and think, 'Ooh.

That's a good price.', 'cause I'll know what bookmakers usually offer for them sort of odds, then people learn what odds stuff is, and then if they are offering a price boost, it will have an effect. Definitely." (Problem gambler interview 2)

"My knowledge of gambling is quite high, I've always understood it, how to place a bet, what the odds mean. I've always understood all of that. But the marketing...I suppose it puts into people's heads that you do realise there's a game tonight or you do realise there's this festival or...I suppose it's a second tier of advertising for the event, if you like." (Problem gambler interview 3)

"the marketing – yeah – 'cause it makes me despise it even more, you know, now that I've come through a problem. It makes me just despise the whole industry to be honest with you, you know? I don't like it at all. That's how I feel." (Problem gambler group)

Those in the young people and mental health groups agreed that gambling marketing had a positive tone, and stressed the enjoyment and happiness resulting from participating in gambling activities. As has been mentioned, this resulted in the view that such marketing influenced attitudes towards gambling, and made it more likely that people might be enticed in to trying a gambling activity. On the other hand, participants argued that this marketing had little or no impact on themselves, and believed that marketing had the capacity to appeal to some individuals (described in some groups as naïve or vulnerable people) and be ignored by others. It was also argued, though, that the gambling adverts entered the mind subconsciously, with the result that awareness of gambling was higher than might be assumed, even if the longer-term impact of this was difficult to assess.

"It just makes me not trust it, It seems dishonest the way they make everything so positive, and show it through rose-tinted glasses about everybody winning, and, you know, that 'Take a chance' thing, and then right at the very bottom they have sort of all the safety warnings about doing it, but just in tiny writing so nobody really pays attention to it. I don't like that." (Young person, aged 20-21)

"I feel like in the last hour I've realised that actually a lot more of it sort of seeps through in your subconscious than you're aware of. I don't feel like it has a significant impact, but it's obviously something that I'm very aware of being there." (Young person, aged 20-21)

"It makes me like it less because I object to gambling advertising being so manipulative." (Mental health group 2)

3.5.2 Impact on gambling behaviour

Participants acknowledged that it was not always straightforward to link gambling marketing with gambling behaviour directly. With the notable exception of problem gamblers, the other participants tended to believe that they had not gambled personally as a result of being exposed to gambling marketing. However, in nearly every focus group, examples were given of family members or friends who were perceived to have gambled as a consequence of seeing gambling advertising. In addition, despite stating they had not gambled personally as a result of being exposed to gambling marketing, participants in the mental health and young people groups also reported occasions

when they perceived themselves to have been prompted into taking part in a gambling activity as a result of seeing gambling marketing such as seeing scratchcards, a Lottery rollover or good odds for a sporting event. They did not always seem to be aware of this apparent contradiction between their attitudes to gambling marketing and their own reported behaviour.

“From experience, having someone in the house who does gamble, if they see an advert, they’ll be more likely to think, ‘Oh. I have money in my pocket. That’s what I could be doing with it’, instead of them thinking, ‘Oh, I should put this money towards a shop’...” (Young person, aged 14-19)

“I remember 888, I went on to as a result of an advert that I’d seen on TV specifically, but there will be others that I’ve done that for.” (Mental health group 2)

“I very rarely do it, but if I ever do buy a scratchcard it’s usually if I heard someone nearby won. I’m like, ‘Oh, well, if they won it, this must be .. this is the good batch!’” (Young person, aged 14-19)

As might be expected, the problem gamblers cited more personal examples of the direct influence of gambling marketing, as well as the effects of a wider range of marketing approaches. The types of marketing that were said to have resulted in gambling included online offers, television advertising and football team shirt sponsorship, bookmakers offering special deals (including enhanced odds, complex bets and ‘free’ bets), and gambling companies sending promotions by text if mobile numbers were required to register online or with bookmakers. This tallies with the participants’ views of what features of gambling marketing might appeal and influence individuals (see Section 3.4).

“There used to be a poker programme on British television – I don’t know if it was Channel 4 – back then. I’m sure it was sponsored by Party Poker. Watching those poker players on telly for the first time, it seemed quite glamorous to me and quite cool that they could earn all this money from doing that. And then I remember Tottenham Hotspur were sponsored by Mansion Poker. Tottenham Hotspur were sponsored...on the shirt, and that was going back 13 years ago now. And they were the two poker sites that I deposited on, and obviously I used my mum’s bank card for that ‘cause I knew I was under-age. I was 17. So it was Party Poker from the television programme, that sponsored the programme, and Tottenham Hotspur that were sponsored by the poker company – the betting site: Mansionpoker.com. That was the initial exposure really, or the effects I can remember from advertising. FOBTs, it was them what I got really hooked on, and that wasn’t through advertisements at the time. I heard about it through word of mouth kinda of thing, you know?” (Problem gambler interview 4)

“My friend there ... is like wi’ the football...Whereas you’d normally get, say, a fiver back or this, if you choose that person to score first, and that team to win 3-0, you could get fifty pound for that, so you’re gonna go, ‘For that same amount o’ money, I’m gonna put that on’, so – yeah – he does that quite a lot.” (Problem gambler group)

It was argued that a number of these promotions were aimed at recruiting a new, younger generation of 'smartphone' gamblers or 'new customers', but also that the sheer volume and nature of the marketing was a source of continuous encouragement to non and infrequent gamblers, and concomitantly sought to lure lapsed problem gamblers back to the practice.

"The new generation gamblers. They're trying to get the new generation – people to come in, keep turning over – coz people die and things, so they need to keep getting gamblers to come in their door and then they profit." (Problem gambler group)

"I think it has a huge impact because I think .. well, it gets people to go online and open these accounts. Like these free bets that you see, and people think, 'Oh, I'm getting summat good here. I'm getting a free £10', but you're not really. You're still risking your money. Yeah. I think it's huge." (Problem gambler interview 2)

"I think it's a negative effect hugely I mean because it's just enticing you back at any available opportunity. It might be whatever day it is, and you might not realise there's a match on that night, but then they might be saying, 'Oh, so-and-so is playing so-and-so tonight. Have a bet'. You know what I mean? It's every day, innit, there's a market to bet on, so – yeah – it has a huge effect on a lot o' people." (Problem gambler interview 2)

"I do remember self-excluding from Betway eventually, but I was gambling like all my wages basically on Betway at one point in the space of like 2 months when I signed up with them, and I'd do my money, I'd even call them then saying, 'Look. I've run out of money. Can you ..' .. I've actually been that desperate I've actually rung them and asked them to place free bets in my account, which they did quite often – Betway in particular. I remember them doing that, just to keep me going kind of thing, you know?, and then if I didn't ask 'em, they would send the email then to entice me back in as well, which they did a few times. Even when I went to rehab – obviously they weren't to know – but, after my first spot in with rehab, I had an email saying, 'There's £10 in your account'." (Problem gambler interview 4)

It was also reported by participants that although gambling marketing increased the likelihood of gambling behaviour, it was common for individuals to think they were immune to its influence and had the capacity to ignore it. The counterpoint to this view was that gambling marketing entered the mind on a subliminal level, and it was difficult to gauge its impact on attitudes to gambling and gambling behaviour. It was also argued that the gambling industry would not invest so much money in advertising if it had a negligible effect.

"I think it's has a different impact on each person. So some people just see gambling as a bit of fun, other people think it is...a need, so they need to go and gamble and then other people just do it now and again. It doesn't have an impact on their lives... it's not an everyday thing they do." (Young person, aged 16-17)

“Subconsciously it has a very big effect because, subconsciously, they're kinda putting it in your face and staying in your head.” (Young person, aged 15-18)

“Huge [impact]. If it didn't, then they wouldn't spend so much money on advertising. I'm sure you could find out how much money they all invest in their advertising and marketing. There's a reason why they do it. They're not stupid. So...beside word of mouth and stuff, that's kind of the main driver to their businesses, and getting these youngsters signed up and stuff, and getting the new generation hooked on gambling basically.” (Problem gambler interview 5)

3.5.3 Impact on young people, problem gamblers and those with mental health issues

Previous sections have addressed the perceived impact of gambling marketing on gambling knowledge, attitudes and behaviours, focusing on the personal perspectives of the participants. However, participants were also asked for their views on overall impact of the marketing on specific groups, namely young people, problem gamblers and those with mental health problems. As might be expected, there was considerable overlap between the responses as often participants described perceived impact on an individual or a more general basis.

As has been reported, a common view was that one of the main functions of gambling marketing was to recruit new, younger members. As such the growth in online, social media marketing was thought to appeal specifically to this age group. Similarly, the offers of incentives such as free bets and other offers to new members from companies was viewed as targeting the younger age groups specifically, if not exclusively. A number of different gambling activities were also cited as appealing directly to the young. Possibly due to the fact that they can be purchased at the age of 16, scratchcards and lottery tickets were thought to be purchased by younger age groups, and it was also argued that predominantly younger males bought scratchcards. The displays at the point of sale in shops were thought to be attractive and alluring to younger people. Fruit machines, larger scale events such as the Grand National and online games with gambling-related functions were perceived as appealing to those at the younger end of the age spectrum, whereas later night advertisements for casinos were thought to appeal to those in their late teens.

“Well like there's people under 19, I think... they do it more than what older people do. Like the Lottery and all that, and scratch cards. I think younger people do that more than what older people do...” (Young person, aged 12-13)

“Coz it's so bright and colourful and stuff, I'd also worry about kids watching it, coz they're attracted to fun stuff, and that sort of looks like it's a game and it's fun, and everybody has smartphones these days, so I'd be worried about kids downloading apps and stuff like that and trying to use it.” (Young person, aged 20-21)

“... Well I think see if it's on YouTube its worse because it's pointed to younger children, but if it's in a newspaper or something a lot of older people just brush by it and a lot of young people don't actually read a newspaper. So...I think it

being online advertising its worse. A lot of younger children will just click on it.”
(Young person, aged 12-13)

“I’ve worked with young people really my whole life, and it [gambling] wasn’t really much of an issue, but it feels like it’s become more of an issue. We’ve had – not loads – but we’ve had a few kids, under 18 obviously, managing to gamble. I mean a lot of that was scratchcards though, and lottery, but some online gambling as well...so I’ve had experience with sort of younger teenage males who are quite impulsive and quite naïve, thinking that they can earn money by gambling, so I think that the advertising thing plays a part in that. Definitely.” (Problem gambler interview 4)

*“And see referring back to younger kids? My nieces play all sorts o’ games on their phone. Before you know it, it’s like, ‘Buy coins to get this’ or ‘Spin this, and get this coin.’, ‘Buy this for £1.99 and get a free spin’, and I’m like, ‘Why the f***?’. Sorry. ‘That’s gambling’. And she’s like, ‘It’s OK. It’s just I need more blocks to build this thing.’, and I’m like ‘Right. So you need to cut that. You can’t have that on the phone’... Like that’s eight years old I’m talking about, and they’re telling them to ‘spin things to win things’.”* (Problem gambler group)

Problem gamblers were reported as being particularly susceptible to gambling marketing. Special and enhanced offers, specific approaches by bookmaker staff, targeted emails as well as the ubiquitous marketing they are exposed to were described as preying on the “vulnerable” and compulsive gamblers. Those who had stopped gambling were viewed as being at risk of relapse when faced with the profusion of marketing. In terms of mental health, it was pointed out that gambling problems could result in depression, but also that those with active mental health issues could lack judgement if their perceptions were altered, and could be susceptible to gambling marketing.

“Vulnerable people, or compulsive gamblers that haven’t yet admitted to being a compulsive gambler. They...well they’re preying on them really; the gambling companies are looking at them to spend the most money the way I look at it. That’s the people they’re preying on. But in my eyes they can see who these people are. Like I said earlier it’s a business and there’s a fine line between them running the business or just looking after everybody’s welfare. If we were just interested in everybody’s welfare then I don’t think the gambling industry would be around.” (Problem gambler interview 3)

“I obviously don’t like the amount of adverts and stuff they bombard you with. I think it’s wrong, immoral, and I do believe that the sign-up offers that they push is designed to obviously get the youngsters hooked: kind of you deposit money and then you get matched deposit – ‘free money’ effectively – and they really do target the youngsters coming through, and that’s the bit I don’t like about it. So I wouldn’t say anger, but I’d probably be frustrated seeing these adverts in recent years, just because I know of the damage that that could possibly do to somebody, but, before that, I probably didn’t take a lot of interest in it because I was already gambling by then, but these adverts are probably what got me started as well, you know?” (Problem gambler interview 5)

“And the biggest one is when you go in and play the machines in the bookmakers, you know how it's £50 a spin? See when you go in wi' your card, “Oh, you want up to £100 a spin?”. That's the whole point I'm talking about, the problem gamblers. They know you're a problem gambler, but then they'll try and get you to £100 a spin.”

“Yeah. They know that you're vulnerable to an extent, so they know that you'll put that extra £50 on, that extra £100 on.” (Problem gambler group)

3.5.4 Impact by type of marketing

Participants were asked if any type of gambling marketing was more influential in terms of getting individuals to engage in gambling activity. There was no clear consensus among the participants, though the adult participants were perhaps more likely to think that television was most immediate and impactful, whereas the younger age groups often mentioned advertising online and in social media sites. Of course, some of the adverts being watched on television were also being viewed online. However, it is important to note that the perceived ubiquitous nature of gambling advertising meant that, for example, bookmaker outlets on high streets (including offers within these stores), billboards and bus shelters, sports sponsorship, emails and newspaper adverts were all thought to have a synergistic effect and potentially impact on the mind both consciously and subconsciously. There were a few comments elicited which suggested that door drops might be ineffective, as they were generally ignored and were placed directly into the recycling.

“Definitely – because the ones that are most attuned to where you're interested in will work. So my kids will be seeing that going up and down the road. They'll see it on the bus stops. So no more on the buses, no more on the High Street, you know? Let's just not make it have that space.” (Problem gambler interview 3)

“Yeah, I would say television advertising is quite powerful as opposed to advertising going around the side of a football pitch or in the newspaper. If it's an advert in a newspaper the chances are the odds have changed by the time you've had your newspaper and you've considered what you're going to do and then you log on to take them up on that bet, it may have changed. So I would say the most powerful one is the TV and the most used I'd say.” (Problem gambler interview 3)

“Social media marketing, 'cause literally nowadays everybody has social media. Like you've always got one form, even if it's like YouTube. So many people watch YouTube nowadays. Some people have Facebook, Twitter.” (Young person, aged 15-18)

Marketing that was focused on a specific interest of individuals was reported as being more likely to appeal to them, such as Bet365 and Paddy Power adverts related to football and horse racing respectively. Similarly, special offers within bookmakers, such as to play FOBTs or other machines within the outlet, appealed to problem gamblers.

“Aye. 'Cause the thing is wi' the bets for like football and horse racing, you've got to wait on that result coming in, whereas, these games, I found myself you

could put 40 spins on one game in the space of 10 minutes, whereas these games you've got a bet on – for example, 12/1 – you're waiting 90 minutes for that one thing to happen, whereas in that 90 minutes you could have put £5,000, £10,000, £20,000 in to these machines, so that type o' promotion I would say, like you say, is a massive percentage, but it's targeted big time.”
(Problem gambler group)

3.5.5 Impact by social context

Participants were asked if social cultures, the local community, family and friends, and factors such as religion had any impact on gambling behaviour. The influence of family was thought to be important in encouraging gambling behaviour. Examples were given of close relatives involving younger family members in betting, lottery, pools and other related activities.

“I think it's just about parents as well. Like my mum and dad...they both play the lottery. Like you grow up tae be like, 'Oh, that's normal.'... 'Maybe I should dae the lottery.' So it's no just advertising. My gran does the lottery, my mum does the lottery. Like I think you just grow up to be like, 'Oh, this is normal.'” (Young person, aged 16-19)

“No, the only person that I could think of was my granddad, he used to spend his days in the bookmakers with small stake bets. I would guess every day, it was part of his life, but they were small stake bets. I believe that's where I got it from not to blame but that's where it comes from.” (Problem gambler interview 3)

Friends were also thought to influence gambling behaviour, if not to the same extent as family members. However, it was also stressed that this influence could work in opposing ways, with some arguing that exposure to relatives with gambling-related problems had resulted in their own abstention, as well as problem gambling emerging in a family with no previous relevant history.

“My parents both were very heavy gamblers, so it's something that I will not participate in at all.” (Mental health group 2)

“I probably would have fallen like in to the whole gambling trap if I hadnae seen what it done to my boyfriend, and like some o' the states he's got himself in tae like just fae gambling.” (Young person, aged 16-19)

As has been mentioned, bookmakers were said to thrive in areas of lower socioeconomic status. It was argued that gambling was particularly engrained within working class culture. This was thought to be due to a number of factors, such as a relative lack of wealth resulting in an increased likelihood of taking part in the football pools, bingo or the lottery. The first trip to the betting shop with a relative was described as a rite of passage for (predominantly) younger males in the family.

“To be honest with you, until I've sat down to do this, I haven't really thought about it that much, and think actually how ingrained it is in my upbringing and in my culture from a working-class background...well, you always did the football pools, and then folk did the lottery. My dad still does the lottery, and he thinks

nothing of it. It's always what he does, and it's a wee joke, and it's passed on to the kids. It's like, 'Oh, if we win the lottery, then we'll be buying that' whatever. And everyone knows that you're not really gonna, but there's something about this little bit o' hope..." (Mental health group 2)

"My father used to sit on a Saturday afternoon with his bicycle clips on, and watch one horse race, then cycle to the bookies – I never saw him do it, but I saw him go – and put his bet on, and come back and watch it, and swear the whole of Saturday afternoon, and it wasn't pleasant." (Mental health group 2)

"... But see likes o' it was a coming of age for some boys, you know, when their dad would take them down to the bookies – 'Come and put a line on wi' your old man.'" (Problem gambler group)

Interestingly, religion was not raised spontaneously as a factor in terms of influencing views on gambling marketing or on gambling behaviour itself. When participants were asked about the influence of religion specifically, the most common response was that religious groups, such as Muslims or devout Christians, would disapprove of gambling and would not take part themselves.

3.5.6 Positive impact of gambling marketing

Participants were asked if they could think of any positive aspects of gambling marketing. Given the generally negative impacts reported above, unsurprisingly they were unable to cite beneficial or even neutral effects of gambling marketing. It was argued that advertising of the lottery may be worthwhile, as it funds good causes, though it was also stated that government should be funding these initiatives without the need for a lottery. A few comments were received which suggested that marketing might not have a malign influence if it was only likely to affect those with sufficient money, without gambling problems or addictive personalities, and if gambling participation resulted in gaining rather than losing money. However, it was pointed out that marketing does not function in this way, that gambling marketing was unrealistic and offered false hope and steps should be taken to regulate its nature and scope.

"I suppose that is the main thing is that it does pay in to the lottery, and unfortunately that means that that's how the Government then uses to fund things that it ought to be funding in another way." (Mental health group 2)

"Obviously, I'm biased I suppose, but I really can't think of any anyway. I don't think there's any positives that come from it really." (Problem gambler interview 5)

"If it was more realistic to the chances of winning, I think it would be more beneficial to people looking at it, but then, since it's not, since it's very positive and they portray that there's no chance of failure when you do these sort of things, it makes not a lot o' sense in the whole scheme o' things." (Young person, aged 14-19)

3.5.7 Negative impact of gambling marketing

As participants had reported that gambling marketing influences gambling behaviour, participants tended to cite the adverse effects of gambling itself when asked what the negative features of marketing might be. It was perceived to be particularly harmful for those with little money. At best, it was said to be responsible for a relatively modest loss of money. However, the consensus was that it was implicated in the very worst case scenarios that can result from problem gambling, including severe debt, addiction, relationship and family breakdown, homelessness, criminal activity, prison and suicide.

“I mean it starts with the advertising, get you hooked in, but if you fast forward years down the line, those problem gamblers – and there's a lot of us – you know, lead to all sorts of problems, like prison, suicide, rehab, or just crime in general, break up of relationships, heartache for family. My family have been through it as well, so it has a wider impact not just on the individual, but it has an impact on a lot of aspects of society which are not really looked at at the moment, but they should be looking at it ‘cause for every one gambling addict, there's gonna be a bit of destruction around them...Employment as well. I wasn't able to hold down a job for more than a year normally.” (PG interview 5)

“There's not really any exploration that's visible in the media, or there's not anyone out there saying, ‘A gambling addiction made me lose my home. It made me lose my family. It ruined these relationships.’ No one's out there spreading that information. Instead, it's like, ‘Oh, I won this amount o' money’, therefore there's not really any negative portrayal of it. And also the little thing they have at the bottom of the posters and the adverts, it still has the word ‘fun’ in it. It's still making you think, ‘Oh, this is fun.’ It's not making you think, ‘Oh my God. This could ruin my life if I take it too far.’” (Young person, aged 14-19)

“I mean it's like asking that for smoking, ‘What's the positive things about advertising cigarettes?’. Was there any positive sides when it's been proven that it's bad for you and it's detrimental to your health? Gambling's just as bad, it's worse.” (Problem gambler group)

The safeguarding messages included within the advertisements were described as being inadequate. There was a view that the warnings were ambiguous and often small and placed at the bottom of advert where they were easily missed.

“Yeah it [the warning] presents itself right at the end but it's always minor, it's always at the very end, it's never a prominent discussion of the whole ad.” (Young person, aged 19-23)

“It's telling you, ‘When the fun stops, stop.’ That's all very well someone coming up and saying, ‘It's all right to stop’. Somebody that's got an addiction will continue that addiction until they properly get something done about it. In terms of somebody just saying like, ‘The fun stops, stop.’, that's not good enough. For someone to be able to access something online so easily now.” (Problem gambler group)

“I think the advertisement saying that, ‘When the fun stops ..’ isn't as accurate as saying, ‘When your life is at a place where you're relying on this as a source

of entertainment, to the detriment of everything else, stop.’, coz obviously when you say, ‘When the fun stops’, it’s so lighthearted. It’s like you don’t know when it actually stops because you don’t usually notice that it’s an addiction until it’s too late, if that makes sense, because there’s not many do that.” (Young person, aged 14-19)

3.6 Changes to Gambling marketing

3.6.1 Legislative restrictions to gambling marketing

The consensus across all target groups was that legislation was needed to restrict gambling advertising and promotions, at the very least. Gambling marketing was viewed as being ubiquitous, and young people, problem gamblers and other susceptible individuals were thought to need protection from its influence. Gambling marketing was contrasted unfavourably with alcohol and tobacco marketing, both of which were described as being much less intrusive and visible after legislative changes, despite the fact that gambling could be as destructive as alcohol and tobacco to individuals, families and communities. Many of the changes called for by the participants had already been implemented in relation to alcohol or tobacco. As a consequence, the most commonly reported change requested was for either a total ban on gambling marketing and advertising, or for any marketing to be limited to places where only those interested in gambling would have access to it, such as in the horse racing press or within betting shops.

“Probably, obviously it’s a business that’s running it, so they have to do marketing, that’s just what it is. We know that but we’ve had to stop marketing cigarettes, we’ve had to stop marketing alcohol...Whereas with this it isn’t yet... I suppose at one point or another stopping gambling advertising should be done because it isn’t actually contributing any good to having it there.” (Young person, aged 19-23)

“An absolute blanket ban on it [gambling marketing] all. That was what I would hope that would happen. I know it’s not going to happen overnight, but like it did with smoking cigarettes. I hope the gambling industry is going down the same route as that and we do get to...a blanket ban on advertising. Just let them keep it in the racing papers or on their gambling sites. People know very well where to go they should just be going to them and looking for it themselves really.” (Problem gambler interview 3)

In terms of television advertising, it was emphasised that it was commonplace, particularly during or associated with sporting events, and developments such as the recent whistle to whistle ban would not address the scale of the problem. Problem gamblers were more likely to note that whistle to whistle bans were going to be ineffective given the amount of pitch-side advertising and the amount of football teams wearing shirts sponsored by gambling companies.

“I think a good start would be the whistle to whistle stop on it, but I would love to see it totally off the telly. No gambling. It should just be a blanket ‘no gambling adverts.’ Nothing around the pitches and also the sponsors of the football teams

*– that should be all out of it as well. But that’s me, I’ve had a problem.”
(Problem gambler interview 3)*

“I’d love the football stuff to stop...I think that entices kids, and half-time adverts for gambling, I’d like it to go the way of smoking. I think people have the right to gamble, but I’d prefer there to be more restrictions on gambling advertising – a bit like it is for smoking and alcohol.” (Problem gambler interview 4)

A watershed ban was proposed, particularly after 9pm, as it was thought that this would limit the amount of advertising children and young people would see. This would, for example, reduce the number of family shows being sponsored by gambling companies which were frequently mentioned by participants. Similarly, an overall reduction in the number of adverts was called for.

“I suppose if you show adverts... You know how with some things you can show it after 9pm or whatever. Just do the same sort of thing with that. Don’t have it on during the day.” (Young person, aged 20-21)

“Take gambling promotions off the telly or the internet so it’s not in your face constantly, 24x7..you wake up in the middle o’ the night, you look at your phone – betting. Turn on the telly – betting. It’s everywhere.” (Problem gambler group)

The problem of online advertising was also raised by participants, particularly if not exclusively in relation to its accessibility to young people. Examples of television adverts appearing on YouTube, as well as frequent pop-up adverts appearing on different social media sites were cited by all participant types. It was reported that these adverts featured frequently on different platforms, and did not appear to be targeted exclusively at those who used gambling sites.

“Just maybe not put it on the internet as much because like...even like kids like 5 go on like YouTube to watch like the rhymes and everything so like adverts that they’ll see sometimes and probably not know what they are, they will probably learn by just sitting watching it.” (Young person, aged 12-13)

“I don’t really visit any gambling sites or anything like that, but I still see gambling adverts, and also I’ve been seeing gambling adverts since I was quite young, and I kind of just think targeted adverts, they could probably figure out roughly what age I am because of what I look at...It’s kind of the opposite targeted advertisement, but maybe if it does pick up maybe this person is a younger person, maybe target the gambling advertisements away from them so that, you know, if someone is 15 on YouTube, they’re not going to see gambling adverts.” (Young person, aged 14-19)

The issue of scratchcards being displayed in colourful arrays at the point of sale was viewed as being problematical by all participant types. Again, this was compared with the tobacco gantries before they were shuttered, and it was argued that the scratchcards should be covered as they looked very appealing and attractive. Similarly, though not as commonly, there were comments made saying that lottery stands or stalls in shops should be restricted, as they appealed to the young and those living under financial constraints. It was also argued that the legal age for purchasing scratchcards and lottery tickets should be raised to 18 years.

“At least with cigarettes now, they're kinda having to cover it up, but I kinda feel like they [gambling marketing] should have to do the same as well because I feel like stuff like that is very out there where you can see it.” (Young person, aged 14-19)

“... because if people come into the shops and say ‘oh do you want to try the Postcode Lottery’ and just stand at the side with a wee stall...there’s no real point in it because you can’t go anywhere without somebody saying ‘oh do you want to try this; do you want to try that.’” (Young person, aged 12-13)

“I think we would need to be removing scratchcards... And I think the law should be changed to the age group that’s allowed to gamble because there are too many children that have been allowed to gamble under the age of 18 on social media.”

“That’s true. Scratchcards is 16 as well, isn’t it? .. so you could up the age. That’s very true.” (Mental health group 2)

The number of bookmakers and their shopfront displays in different communities was raised as a concern by every participant type, though it was most frequently expressed by problem gamblers and those in the mental health groups. High streets of towns were said to be dominated by several bookmakers with alluring and colourful displays and offers in the shop windows. It was also stated that other shops in these towns were closing down, but bookmakers appeared to be proliferating, particularly in more deprived neighbourhoods. Calls for the number of these outlets to be limited within communities were made. It was also reported that they should not be allowed to advertise offers through the shop windows – that these outlets should have opaque glass – and any advertising should only be allowed within the shop itself. Specific examples of betting shop staff giving those within the shop coffee and sandwiches in order to increase the likelihood and number of bets being placed were also given.

“I think they should cut down the stores that they have everywhere, ‘cause there’s quite a few in a few places an’ that, and that’s like where everybody is obviously going to spend their money. I think it’s quite bad.” (Young person, aged 16-19)

“If somebody’s coming in to [name of town] as well, to visit – they’ve never been here, right? – so you come off the train and then you walk 2 minutes, they’ve got Paddy Powers, they’ve got Ladbrokes and you’ve got William Hills.” (Mental health group 1)

“Why not have a closed shop front? Like we’re saying, if you want to gamble .. but still have your Ladbrokes or whatever, your Coral. You know where to go, but, instead o’ all these adverts all beaming out. And that’s the thing. Why not have it .. Like when you go in to some o’ the banks or like the credit union or that now, it’s like the frosted glass or whatever, so you can’t see in. I know it might not look pretty, but why not have something like that, and, for the people that want to go, they know where to go anyway, but instead of these displays in your face.” (Problem gambler group)

“And they give you a free tea or a coffee in these bookies, so people who are on their own can go and sit there all day, say, ‘Oh, may as well use their heating and have a wee coffee, than sitting in the house.’, so that’s a way o’ getting gambling into it as well.” (Mental health group 1)

3.6.2 Changes to content and gambling warnings

The nature of gambling marketing was strongly criticised for being one-dimensional and unrealistic, in that it always depicted happy individuals winning and did not display the actual odds of winning or show what happens when a gamble results in a loss of a large sum of money. Also, offers and inducements were described as being misleading. As such, it was described as being exploitative and overly alluring to the young and those susceptible to gambling marketing, for example, problem gamblers. On the other hand, a few comments were elicited which suggested that gambling advertising was difficult to portray accurately, unless it took the form of a public health information advert, perhaps promoted by GambleAware in a similar vein to Drinkaware’s alcohol output.

“Don’t make it [gambling advertising] look so amazing when you could turn out not to win it.” (Young person, aged 13-18)

“They need to have adverts saying, ‘Actually, if you do this too much, this will happen’ – as they do for alcohol and smoking. There’s so many adverts saying, ‘Ah. You’re gonna destroy your lungs.’” (Young person, aged 15-18)

“Why no’ have it showing you a full family being torn apart, and the guy killing himself in there or something?...it’s driven me to have thoughts like that, that I’ll just leave everything behind. They’re better off without me. Let’s show that side o’ it. Let’s show the non-glamorous side.” (Problem gambler group)

“It would be interesting if they put on how many people win and how many people lose, so like ‘Out of 1000 people, 50 people won’, ‘cause I think that would put people off of it a bit more if you actually see the odds of you winning something greater than, say, £10 or something like that.” (Young person, aged 20-21)

“One of my concerns is these offers you get. It’s normally online, so it’s online accounts. I just think they should be clearer that it’d be like ‘Open an account for £1 and get £100 in free bets’, and the small print is like, ‘hundred times wager requirement’, so you kind of have this £100, but you have to spend it, and then you have to gamble to get it back. You’re not gonna get it back, and then you’re kind of in the system kinda thing. I feel that’s almost like false advertising, where things like the wagering requirements and the Ts & Cs. I wish they could be a bit clearer, a bit bigger, ‘cause I think impulsive people or naïve people or vulnerable people will just go for the headline.” (Problem gambler interview 4)

Information about the dangers of gambling, where to seek help, age restrictions and other terms and conditions that were part of current gambling marketing were thought to be wholly inadequate at present. The size of the warnings, the placement of the text and even the messages were described as being dwarfed by the actual gambling marketing. The message “when the fun stops, stop” was also queried in that part of the

enjoyment for some individuals is the challenge of trying to win back money after a series of losses. Therefore, as well as possible gambling-related public information adverts, it was stressed that any warnings in current gambling marketing had to be made much more striking, and information provided had to be as visible as the actual gambling promotion itself.

“Some of like the warnings of it are so small at the bottom of it ... Maybe if they could make them bigger, people would start understanding.” (Young person, aged 13-18)

“I think like with the ‘When the fun stops, stop’ and the GambleAware logos, put them bigger and in the middle, not at the bottom in teeny writing where nobody’s going to pay attention to it right at the end of the advert.” (Young person, aged 20-21)

“Maybe provide a bit more understanding on the website, ‘cause not many gambling websites... They’ve got all their games on it, but they don’t have quite a lot o’ information, so see if their sites maybe provided an information page for people to go to – to then understand a bit more about gambling – it would make gambling a bit safer for them.” (Young person, aged 13-18)

In conclusion, the young people, problem gamblers and those with mental health issues made a number of suggestions as to how gambling marketing might be limited, made more realistic, targeted at those who are interested and engaged in gambling specifically and not young people or those perceived to be particularly susceptible to gambling marketing. Many of the cited changes related to how alcohol and tobacco marketing is already restricted. Interestingly, the participants took a relatively wide view of marketing, and though there was support for either a total or pre-watershed ban on TV, internet and social media advertising, billboards, shops selling or promoting scratchcards and lottery tickets, misleading promotions in newspapers and, in particular, bookmakers proliferating in communities were all thought to need to be addressed. It is arguably the scale of gambling marketing, reported as being ubiquitous by research participants, which then resulted in them suggesting that perhaps the most sensible and pragmatic approach to take was for a total ban on gambling marketing to be introduced, or at least limited to places where only those actively engaged in gambling would see it.

“I think it has to be banned in certain places. There’s no need for it to be in the public space.” (Mental health group 2)

3.7 Current regulatory context: gambling as a public health issue

The research participants, particularly but not exclusively the problem gamblers, were aware of recent political and legislative changes in relation to gambling, such as limiting the maximum stake to £2 when using Fixed Odds Betting Terminals (FOBTs) (due to come into force in April 2019), and the gambling companies’ voluntary agreement to introduce a gambling advertising whistle to whistle ban during the majority of sporting events on television (due to come in for the 2019-20 season). The participants had

doubts about the likely success of such approaches, though a number of problem gamblers had experienced particular problems with FOBTs, and were willing to support anything which reduced their potentially destructive impacts. However, it was pointed out that the whistle to whistle ban would not stop pitch-side advertising or team shirt sponsorship, and therefore the influence of the marketing would continue.

There were frequent parallels drawn between gambling marketing and tobacco and alcohol marketing. The participants argued that the far greater regulation that tobacco and alcohol marketing was subject to, had resulted in a reduction in smoking and drinking, and that as gambling was potentially as harmful to individuals, families and communities, a similar legislative approach should apply. Gambling was also said to disproportionately affect communities of lower socioeconomic status – the relative lack of bookmaker outlets in affluent neighbourhoods was reported. These views suggest that the participants viewed gambling as a public health issue, which would therefore require a systematic approach to limit its adverse effects, including more regulatory controls of its marketing.

3.8 Strengths and limitations

This was a qualitative study, conducted with 62 young people, 13 individuals with experience of mental health issues and 8 with experience of problem gambling across the UK. It is one of the few qualitative studies to explore perceptions of gambling marketing and its impact in young people and those with mental health and problem gambling issues. The research team recruited young people aged 11-24, those with mental health and problem gambling issues, from diverse social backgrounds, with those from areas of lower socioeconomic status well represented. The focus groups were able to use a range of creatives, including a brand logo game with young people, though participants were able to report examples of gambling marketing spontaneously. As it was a qualitative study, while it is possible to explore the views of participants in detail in terms of gambling marketing awareness, knowledge, influence and impact, it is not possible to assess the prevalence of these issues or extrapolate these findings to the whole population. Also, the relatively small numbers who participated in this project made sub-group analysis limited, for example, by sex or age band, and other factors may have been more important (e.g., the most knowledgeable group, problem gamblers, were all male).

3.9 Summary of key findings and future policy implications

The qualitative research with young people, problem gamblers and those with experience of mental health issues demonstrated that:

- Gambling marketing was ubiquitous, and awareness levels among the different participant types were high. As might be expected, problem gamblers had the most widespread knowledge of gambling marketing, but all participants were able to identify gambling companies, brands and advertising spontaneously. Those in the young people groups who initially claimed that they had little

knowledge and awareness of gambling marketing were able to identify gambling companies from only a small section of their logo.

- Marketing was viewed in quite a broad sense. Although references to adverts on television or online were made most frequently, the participants discussed a range of promotions, for example, on billboards, in newspapers, point of sale displays of scratchcards and lottery tickets in shops, and a proliferation of betting shops in more deprived communities. Young people were thought to be most likely, but not exclusively, to be exposed to gambling marketing online.
- The frequency of exposure to gambling marketing was also reported by all participant types. Given the scope of gambling marketing, it was thought to be difficult to avoid and ignore. The widespread nature of gambling marketing was thought to lead to its normalisation within society. Family and friends were also thought to be highly influential, with most participants first becoming exposed to gambling in the family context, at a young age.
- A number of features of gambling marketing aided recall in the participants. This did not always equate to finding these aspects of advertising appealing, as different participants often expressed enjoyment and irritation at the same feature. In young people in particular, bright colours, songs/jingles and dances, use of characters, celebrity endorsement, reference to previous winners and humour were seen to be notable and easy to remember. The problem gamblers and those with mental health issues shared these views too, though the problem gamblers were more likely to also cite special offers and inducements.
- Gambling marketing was also thought to operate on a subliminal level. Participants were able to cite features of the advertising that made it noteworthy, but also said that they were not always aware of how they had accrued their knowledge of different promotions.
- The consensus among all participant types was that gambling marketing was negative and had little to commend it. They thought that it was unrealistic, emphasised social aspects and success, and ignored the negative effects on individuals, families and communities. The associated warnings and safeguarding messages were described as being inadequate and were frequently lost among the much more profuse positive messaging.
- There was no clear consensus when the participants gave their views of the impact of gambling marketing on people's knowledge of, and attitudes towards, gambling. It was most frequently argued that the marketing normalised gambling activities, made them seem commonplace and suggested that they were sociable, harmless and enjoyable.
- It was not always straightforward to link gambling marketing with gambling behaviour directly. Problem gamblers, though, were more likely to report examples of marketing that had influenced them directly. They were also acutely aware of being targeted by advertising and promotions when they were trying to abstain from gambling. The young people and those with mental health issues also cited family members or friends who had been directly influenced by

marketing, and on occasion they also spoke of times that they perceived themselves to have gambled as a consequence of gambling marketing.

Implications for future policy

Participants thought that the regulation tobacco and alcohol marketing was subject to had resulted in a reduction in smoking and drinking prevalence in the UK, and a similar legislative approach should be applied to gambling to reduce its harm. The predominant view was that gambling was as destructive to individuals, families and communities as tobacco and alcohol, and that similar restrictions to its marketing should apply. Gambling was also thought to disproportionately affect communities of lower socioeconomic status, with several betting shops in a small area in these neighbourhoods being reported. Gambling was perceived to be a public health issue, which would therefore require a systematic approach to limit its adverse effects. Increased regulatory control of gambling marketing would be an important part of this. In particular, participants thought that consideration should be paid to:

- The nature of gambling marketing: this was thought to be disingenuous, with an emphasis on success and social activity, and any information on age restrictions and warnings, or signposting to organisations that help those experiencing problems with their gambling, being inadequate. Consideration has to be made as to how to make information related to age restriction and signposting to support organisations more obvious.
- The ubiquitous nature of gambling marketing: Participants called for gambling marketing to either be banned outright, or at least restricted to areas in which only those actively engaged in gambling would have access to it. The voluntary agreement about to be introduced by gambling companies, the whistle to whistle ban, was not thought to be effective given the marketing aspects (pitch-side advertising, shirt sponsorship) that would not be covered. Support was voiced for banning gambling marketing from the public space, with a total or pre-watershed ban on TV, and total or partial restrictions placed on internet and social media advertising, pitch-side/ringside and shirt sponsorship during sporting events, billboards, point-of sale scratchcard and lottery displays in shops, and promotions in betting shop windows. There was also a call to limit the numbers of betting shops, particularly in areas of lower socioeconomic status.
- As young people seemed to find similar features of gambling marketing and adverts appealing as older people, it may be difficult to restrict aspects of marketing to ensure it is only relevant to those of a legal age to gamble. Young people did report finding colour, celebrity endorsement, humour and catchy tunes as being attractive and notable, but the adult participants did too. This, as does the fact that young people enjoy watching sporting events or TV shows sponsored by gambling companies, suggests that wider restrictions may have to be implemented to minimise the impact on young people.