

SAFER GAMBLING CAMPAIGN DEVELOPMENT

AVOIDING BET REGRET

An overview of the campaign to date

December 2020

FOREWORD

Gambling harms are best understood as matters of health and wellbeing – as a public health issue demanding a ‘whole system’ public health response, across:

- Primary prevention - universal promotion of a safer environment
- Secondary prevention - selective intervention for those who may be ‘at risk’
- Tertiary prevention - direct support for those with gambling disorder or for those who may be directly affected

Recognition of gambling as a public health issue is relatively recent, and there is little experience globally of well-evidenced interventions contributing to the prevention of the harms that can be caused by gambling.

Whilst recognising that any campaign is only one of several factors influencing a target group, the Bet Regret campaign has broken new ground in engaging ‘at risk’ groups, in this case frequent sports bettors – a campaign developed in a systematic way following public health campaign principles.

In this context – and in the broader spirit of transparency – this report documents the campaign to date, explaining why it exists and how it came to fruition; what was done and why; what has happened to date (impacts); and lessons that have been learned. It is hoped that the learning reflected in this report will help to inform future campaigns to prevent gambling harms. Intended for a broad audience, more detail in terms of research and data is available for specific academic research purposes.

This campaign represents just one step on the broader journey to keep people safe from the harms that can result from gambling. We, the Safer Gambling Campaign Board, were encouraged by the announcement on 8 December 2020 of a Review of the Gambling Act 2005, with wide terms of reference, including a call for evidence around gambling advertising and sponsorship arrangements across sports and other areas, to which we hope our report will contribute¹.

Many people have been involved in the development and implementation of the Bet Regret campaign, without whose contributions and commitment it would not have happened. I would like to thank: the team at GambleAware for making it happen; the communications agencies, consumer research agencies and consultants who supported this; the many subject matter experts and other stakeholders who gave valuable advice; and the gambling operators, broadcasters and online media platforms that contributed funding and free media space; the Department of Digital, Culture, Media and Sport (DCMS) for the initial impetus and ongoing support; and last but not least my fellow members of the Safer Gambling Board.

Although we will be coming to an end of the two year project in Spring 2021, the learning from the campaign will not be lost and will form the underpinning of further work by GambleAware as we continue to tackle the need to prevent gambling harms.

Professor Sian M Griffiths – Chair, The Safer Gambling Board

¹ <https://www.gov.uk/government/publications/review-of-the-gambling-act-2005-terms-of-reference-and-call-for-evidence/review-of-the-gambling-act-2005-terms-of-reference-and-call-for-evidence>

INTRODUCTION

The designation of gambling as a public health issue in Great Britain is relatively recent². Globally, there is a little experience of well-evidenced campaigns aimed at preventing the harms that can be caused by gambling. In this context, the Bet Regret campaign has broken new ground and has been developed in a systematic way following broader public health campaign principles:

- Robust, evidence-based, and built on a clear logic model
- Continuously measured
- Aiming to deliver positive impacts on behaviour, not just public information

The overall aim of the Bet Regret campaign is to help moderate the gambling behaviour of risky sports bettors³, recognising that any campaign is only one of several factors influencing the target group. Campaign objectives were more specifically defined as:

- Year One: To shift attitudes and provoke conversation amongst the target group on the moderation of sports betting, through the avoidance of impulsive, risky behaviours such as chasing losses in the heat of the moment (Broad audience of sports bettors)
- Year Two: To increase the numbers of risky sports bettors taking steps to cut down their gambling, both generally and by deploying specific moderation techniques and aids (Behaviour Change audience – more frequent bettors)

This report has been prepared by GambleAware on behalf of the independent Safer Gambling Board. GambleAware advocates the application of a public health lens in addressing gambling harms, and the delivery of the Bet Regret campaign is part of a broader strategy to prevent gambling harms that will develop further over time. For example, a potential campaign specifically aimed at preventing gambling harms amongst women is currently in development.

This report provides an overview of the key steps in the campaign's development and implementation, from initial political policy impetus and alignment of stakeholders (October 2016), to the creation of a public health driven approach and capability, to the development and launch of the first stage of the campaign (February 2019), and subsequent development and launch of the more behaviourally focused second stage of the campaign (September 2020) and its initial results.

It covers a period impacted by the coronavirus pandemic, ongoing since March 2020. When we started the project we could not have foreseen the impact of COVID-19 on sport and sports betting, but we monitored the suspension of live sport in Spring 2020 and adapted the programme by pushing back the start of the second stage of the campaign from Spring to September 2020.

The campaign has been extended beyond the proposed two years due to impacts of the coronavirus outbreak. This extended period will end in Spring 2021, following further activity in February and March 2021. This report will be updated, and next steps reviewed at that time.

² Action on gambling-related harms was added to the Public Health England remit in 2018.

³ Currently defined as young men (16-34) who gamble 2 or more times a week, who bet online and who bet on football.

BET REGRET CHRONOLOGY & REPORT COVERAGE

CHAPTER 1: Campaign pre-history, political and stakeholder context – Oct. 2016 to Jan. 2018

- DCMS launched a 'call for evidence' on aspects of the gambling industry, including the impacts of gambling advertising (Oct. 2016).
- Ministers voiced specific concerns relating to the weight of gambling advertising on TV around football.
- In March 2017 DCMS requested proposals from gambling operators, broadcasters and other interested parties for a campaign encouraging 'responsible behaviour' to help balance commercial advertising.
- There followed an extended process, part brokered by the Advertising Association which GambleAware joined, to align stakeholders around a single proposal on campaign aims, funding and delivery.
- On 31 October 2017, based on the subsequent proposal, DCMS announced (for consultation) that GambleAware would lead the independent delivery of a campaign, funded but not guided by operators and broadcasters.
- GambleAware Trustees supported the proposal on the explicit condition that the campaign governance followed a public health driven approach, and was independent of the gambling industry.

CHAPTER 2: Creating a public health driven approach and delivery capability – Feb. to June 2018

- The Safer Gambling Board first met on 8 February, with terms of reference finalised in March.
- In parallel GambleAware was asked to set about building the capability to deliver the campaign at pace, including an initial fast evidence review and process to brief, select and appoint relevant communications agencies (July 2018).

CHAPTER 3: Campaign development Stage 1, leading to 'Bet Regret' – Oct. 2018 to Feb. 2019

- In part due to the initial timetable imposed, the initial agency proposals were not workable and a more thorough programme of consumer research and advice from subject matter experts was undertaken to refine the target group (Consumer Segmentation survey) and creative brief (Oct 2018).
- Creative and media proposals were developed, and funding secured.
- Two further stages of consumer research were undertaken to help select, test and refine the most effective approach.
- The underpinning Logic Model for the campaign was also developed and agreed (November 2018).
- Production of the various campaign materials was undertaken, and the campaign launched on 21 February 2019.

CHAPTER 4: Bet Regret campaign Stage 1 implementation and impacts – from Feb. 2019

- Two main waves of advertising, Feb/ March and Sept/ Oct 2019 – TV plus digital media – plus near continuous digital activity; supplemented by a number of grassroots Bet Regret activations and an online partnership (LADBible).
- Digital only Bet Regret activity continued through to August 2020, as the more behaviourally-focused second stage of the main campaign – originally planned for Spring 2020 – was delayed due to the coronavirus pandemic.
- Regular measurement and reporting of campaign impact, attitudes and behaviour undertaken by Ipsos MORI, with a baseline measure taken in November 2018 (7 waves to date, ongoing).

CHAPTER 5: Campaign development Stage 2, leading to 'Tap Out' – Sept. 2019 to Aug. 2020

- Development of the behaviourally-focused second stage of the campaign commenced, as planned, in September
- A workshop helped generate a long list of behavioural 'nudges', which was then refined to a shortlist of four working with behavioural scientists and academic experts in the area (this was undertaken while Stage 1 was still running).
- The top three were trialled in use by frequent bettors to test usefulness and impact (Ipsos MORI, Nov 2019).
- Creative routes (initially three – based on the winning nudge) developed, tested and refined in consumer research.
- Production and launch put back from Spring until Sept. 2020 due to coronavirus impacts.

CHAPTER 6: Stage 2 campaign implementation and initial impacts – from Sept. 2020, ongoing

- 'Tap out for time out and avoid Bet Regret' was launched on TV, digital and radio on 8 September 2020, with TV running until the end of October – with a further wave planned for Feb/ March 2021.
- Initial results from the Ipsos MORI tracking are included here.

EXECUTIVE SUMMARY – KEY LEARNINGS OVERVIEW

Chapter 1: Campaign pre-history, political and stakeholder context – Oct. 2016 to Jan. 2018

Although the campaign is funded by donations from gambling operators, broadcasters and some digital media channels great care was taken to follow public health campaign principles which were delivered by an independent board in terms of governance and decision-making.

Initial impetus for the campaign, and the request to gambling operators and broadcasters to support it, came from a broader review of gambling undertaken by DCMS, rather than from any specific focus on public health – although gambling harms have subsequently become formally recognised in public health terms and added to the PHE remit (initially for research).

A complex stakeholder ecosystem meant that the campaign necessarily had a long gestation period, before even the formation of the Safer Gambling Board. A key learning point here is that in this type of context creating the necessary alignment to be able to start to make a difference takes time, persistence, a lot of engagement, listening and negotiation.

Chapter 2: Creating a public health driven approach and delivery capability – Feb. to June 2018

The request that the Board proceed at pace – with the aim of launching in Autumn 2018 – was understandable, but in retrospect did not allow time for consumer research, nor for as full a consultation with subject matter experts as would have been desirable, to get to a validated strategy. After initial agency pitches and creative recommendations, there was insufficient confidence and alignment on a way forward. This related to fundamental concerns about the original brief – based on setting limits – and it was agreed that a more thorough strategic process was needed. However, the Board recognised the need to focus the campaign given limited budget and agreed to target the largest at-risk group – young men betting on football.

This initial work (up to June 2018) produced many valuable learnings, in a relatively short time, about what might - and might not - work. The decision was made to take a step back to build on this work, to consult more broadly than time constraints had initially permitted, and undertake a stepwise approach guided by several stages of research with the target group of younger male bettors – still at pace but not constrained by a set deadline.

It was recognised that this was a difficult communications challenge, with no existing success models to build on. Getting to an effective campaign solution, and alignment around it, would require a more thorough and iterative process and it was decided to adjust the timetable to accommodate more consultation with the target group.

Chapter 3: Campaign development Stage 1, leading to ‘Bet Regret’ – Oct. 2018 to Feb. 2019

Taking the time to allow for the more considered approach from July 2018 (albeit building on valuable learnings from the deadline-driven process in February to June), was important in getting to a well-validated approach, and alignment on it.

It allowed for a broad consultation with subject matter experts, but also enabled the move from the theoretical to the practical by testing and refining approaches with the target group. Ultimately, there is no substitute to listening and testing ideas with the target group in consumer research, in an

iterative 'test and refine' (or reject) way – which takes time, and consequently was not feasible in the initial stage of development.

Key learnings for ways to approach future stages of a campaign (unless there is strong existing learning to build on) include realistic timings allowing for a more orderly process:

- Follow a stepwise process, and allow realistic timings
- Undertake a full scoping exercise gathering existing learnings, stakeholder and subject matter expert views (generally requiring 3-4 months minimum), and develop a prototype Logic Model (possibly to be refined later) before moving to campaign development
- Work with a communications agency, take forward the key hypotheses relating to effective interventions and messages – and ways of engaging the target group with these – in a multi-stage programme of consumer research
- Regular 'check ins' on progress between the Campaign Director and Chair of the Board, between quarterly Board meetings

These learnings were applied successfully to the development of Stage 2 of this campaign, and also to a potential campaign that is now in development specifically aimed at preventing gambling harms amongst women

Chapter 4: Bet Regret campaign Stage 1 implementation and impacts – from Feb. 2019

The Bet Regret campaign achieved high levels of recognition and engagement, despite a budget dwarfed by the total communications spend of gambling operators (representing a 2.8% share of voice of total sports betting spend - source: Nielsen). The campaign has been monitored by Ipsos Mori with 7 waves of the Tracking Study conducted pre and post each wave of activity.

With 'in principle' awareness of risks already high amongst regular sports bettors, the main shifts observed were in fact closer to the behavioural end of the Logic Model – showing directional increases in the number of bettors considering cutting down and decreases in numbers reporting behaviours widely regarded as risky. It is significant that implicit warnings about the risks of betting via the Bet Regret-inducing scenarios featured (when chasing losses, drinking, betting on things we know little about, or when bored) have directly impacted on reported behaviour.

It reinforces a general learning that, while emotional engagement may be a necessary precondition to behaviour change, behavioural response is also dependent on more concrete suggestions of what people should do to help moderate their behaviour and reduce the risks of harms. This was particularly important as research had shown that no one moderation technique was top of mind.

Having created the association between potentially risky betting behaviours and the (unwanted) experience of Bet Regret, the platform was established for the next stage of the campaign, to provide bettors with techniques to help them avoid it.

Chapter 5: Campaign development Stage 2, leading to 'Tap Out' – Sept. 2019 to Aug. 2020

The key learning here is that the process learnings from Chapters 2 and 3 (from the development of Stage 1 of the campaign) are very valuable, with the development process for Stage 2 (the impacts of COVID excepted) running smoothly – leading to the identification of the mental aid of 'tapping out' and closing your betting app, to create a pause before committing to a bet.

Chapter 6: Stage 2 campaign implementation and initial impacts – from Sept. 2020, ongoing

The Tap Out message has cut through and been clearly received, especially by those for whom it is most relevant behaviourally as an aid to moderate and prevent harms – whether via literally tapping out or simply prompting people to pause and reflect before making a bet. It is highly talkable and has the potential to complement 'Bet Regret' by becoming a meme and useful mental aid amongst bettors.

What is not clear at this point – a few weeks in – is whether it can be successfully embedded in bettor's routines as a regular, default behaviour. This is clearly the challenge and focus for the refinement for communications for the next wave of activity in February/ March 2021 (guided by further analysis and diagnostic research).

In encouraging more considered, less impulsive betting behaviours any campaign pits itself against considerable pressures in the other direction across broadcast and social media. For example, 'push' messages in app, often focused on immediate, in-play betting opportunities, and increasingly frictionless betting interfaces.

Effective prevention of gambling harms requires a coherent and co-ordinated whole systems approach involving partnerships with other organisations to inform and educate, as well as consideration of regulatory interventions and product safety and design requirements.

A legitimate question is how much any communications campaign can achieve in isolation. It is clear that the Bet Regret campaign is only one part of a broader public health dynamic, preparing the ground for behaviour change amongst those who gamble and across the whole gambling ecosystem. This includes safer gambling commitments made by operators themselves (in terms of safer gambling communication and tools), and likely regulatory action.

The Board is encouraged by the announcement on 8 December 2020 of a Review of the Gambling Act 2005, with wide terms of reference, including a call for evidence on gambling advertising and sponsorship arrangements across sports and other areas⁴.

⁴ <https://www.gov.uk/government/publications/review-of-the-gambling-act-2005-terms-of-reference-and-call-for-evidence/review-of-the-gambling-act-2005-terms-of-reference-and-call-for-evidence>

CHAPTER 1: CAMPAIGN PRE-HISTORY, POLITICAL AND STAKEHOLDER CONTEXT – OCT. 2016 TO JAN. 2018

The initial impetus for the campaign

In October 2016, the Department of Culture, Media and Sport (DCMS) launched a ‘call for evidence’ on aspects of the gambling industry, including the impacts of gambling advertising.⁵

This was intended to “gather evidence to fully assess current rules and protocols in the gambling sector and to help inform the government to make decisions on any necessary amendments to gambling regulation”. A particular focus was fixed-odds betting terminals (FOBTs). However, “(E)vidence will also be sought on measures to protect against gambling related harm including the impacts of gambling advertising and whether the right regulations are currently in place to protect children and vulnerable people”.

On the same day, the Secretary of State for Culture, Media and Sport (Rt Hon Karen Bradley, MP) gave evidence to the House of Commons Culture, Media and Sport Committee in relation to gambling-related advertising and the possible impact on children. Her comments were widely reported in the national media.

In December 2016, GambleAware published its response to the Government’s ‘call for evidence’.⁶ In relation to gambling advertising they cited two research reports commissioned by GambleAware: a critical research review of gambling advertising (Binde, 2014) and an investigation into the role of social media (Miller, Krasodowski-Jones & Smith, 2016).

On 30 January 2017, Tracey Crouch, MP (Minister of State, DCMS) hosted a roundtable to discuss gambling advertising with representatives from both the gambling and broadcast industries. (GambleAware was not invited). In particular, the Minister raised concerns relating to the ubiquity of gambling promotion around sports coverage (especially football) .

On 9 March 2017, in the light of an emerging consensus about the need for ‘stand-alone’ advertising promoting responsible behaviour and/or warning of the risks associated with gambling that would serve to provide some balance to the existing commercial advertising, GambleAware Trustees discussed an invitation from DCMS to submit a ‘proposition’ about what the charity may think would be an appropriate approach.⁷ GambleAware wrote to Tracey Crouch, MP setting out details of what a GambleAware-led advertising campaign might look like.⁸

DCMS received separate responses from gambling industry trade bodies and broadcasters, as well as GambleAware. They then requested that the various parties work together to align on a single response. Helped by an independent consultant, the Advertising Association undertook to facilitate this response, to cover approach, governance and funding.

On 15 August 2017, the Advertising Association wrote to Tracey Crouch with proposals for a major responsible gambling advertising campaign, to run for two years with a budget of £5-7 million in each year.⁹ The letter was also signed by representatives from the gambling industry, broadcasters and GambleAware.

⁵ <https://www.gov.uk/government/news/government-calls-for-evidence-on-gaming-machines>

⁶ <https://about.gambleaware.org/media/1361/gambleawares-submission-to-dcms-review-of-gaming-machines-2-december-2016.pdf>

⁷ GambleAware Board meeting on 9 March 2017 – agenda item 12

⁸ Letter dated 13 March 2017

GambleAware Trustees supported the proposal on the explicit condition that the campaign governance followed a public health driven approach and decision-making was independent of the gambling industry.

On the 31 October 2017, DCMS published the responses to its 'call for evidence' and the Government's proposals for consultation until 23 January 2018. The consultation reflected the proposals made via the Advertising Association for a safer gambling campaign and noted: *"GambleAware will lead the campaign, ensuring the content is independently approved and meets the campaign objectives. It intends to set up a Campaign Board and Delivery Unit, appointing an independent chair of the Board and approving all campaign content. The Government welcomes the initiative by broadcasters and the gambling industry to fund and work with GambleAware to deliver a major responsible gambling advertising campaign."*¹⁰.

At the outset the aim of the campaign was defined as a) to raise public awareness of risks associated with gambling and b) signposting to further advice and support where necessary. It was agreed that the responsible gambling industry group, Senet, would continue to fund its existing 'When The Fun Stops Stop' messaging and responsible gambling advertising work, but work to bring this in line with the wider campaign¹¹.

Formation of the Safer Gambling Board

On 15 November 2017, GambleAware wrote to all parties to advise them of the proposed governance and delivery arrangements for the campaign. The first meeting of the Safer Gambling Board was held on 8 February 2018, where terms of reference were discussed and subsequently confirmed in March 2018.

The Board currently comprises¹²:

- As Chair, Professor Sian Griffiths, GambleAware Trustee: Associate Non Exec Director, Public Health England; Non-Exec Director Public Health Wales
- Sheila Mitchell, former Marketing Director, Public Health England
- Teresa Owen, Executive Director of Public Health, Betsi Cadwaladr University Health Board
- Professor Marcantonio Spada, GambleAware Trustee and Professor of Addictive Behaviours and Mental Health at London South Bank University
- Marc Etches, Chief Executive, GambleAware
- Department of Digital, Culture, Media and Sport representative

Professor Antony C. Moss, BSc (Hons), PhD, Professor of Addictive Behaviour Science and Director of Education & Student Experience at the School of Applied Sciences, London South Bank University acts as an academic adviser to the Board.

Bodies that originally proposed the campaign to Government and which are funding it in cash and in kind are also present as observers – the Advertising Association, the Betting & Gaming Council, Regulus Partners (an industry consultant) and commercial broadcasters (represented by Sky).

The terms of reference¹³ for the Board make clear that only full members of the Board exercise voting rights, observers are updated regularly on campaign development but have no role in decisions about the direction and content of the campaign.

¹⁰https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/655969/Consultation_on_proposals_for_changes_to_Gaming_Machines_and_Social_Responsibility_Measures.pdf

¹¹ Senet has now been disbanded, and superseded by the Betting & Gaming Council; discussions on alignments are ongoing.

¹² 2 original members withdrew in July 2018, with 3 new members added soon after

¹³ <https://about.gambleaware.org/media/1763/final-draft-terms-of-reference-14032018.pdf>

The Board has steered the subsequent development of strategy and implementation of the campaign, based on an evidence-based, public health-driven approach.

During the development of the campaign the Board consulted an Advisory Panel, established to help inform the Board's decision-making as well as to provide confidence to all stakeholders. This panel comprised members with lived experience of gambling harms, and representatives from faith leaders (represented by CofE), GamCare, Camelot, Adfam and the Royal Society of Public Health.

GambleAware context

GambleAware¹⁴ is a wholly independent charity working to keep people in Great Britain safe from gambling harms. Gambling harms are best understood as matters of health and wellbeing – as a public health issue demanding a 'whole system' public health response, across:

- Primary prevention - universal promotion of a safer environment
- Secondary prevention - selective intervention for those who may be 'at risk'
- Tertiary prevention - direct support for those with gambling disorder or for those who may be directly affected

Guided by this public health model, GambleAware commissions prevention and treatment services in England, Scotland and Wales underpinned by research and evaluation – working to ensure evidence-informed services are developed according to need within a robust and accountable system, and that funding is allocated efficiently and independently.

Effective prevention of gambling harms requires a coherent and co-ordinated 'whole systems approach' involving partnership with the NHS, public health agencies, local authorities, and voluntary sector organisations. This will ensure appropriate referral routes and care pathways are in place for individuals in need of support, including treatment, to receive the right intervention at the right time.

GambleAware plays an important role within this approach, guided by an independent and expert Board of Trustees, the majority of whom work in the health sector. All work is undertaken within an established range of governance processes and procedures, that ensure the industry has no influence over any commissioning decisions (including those relating to the campaign covered in this report).

The Safer Gambling Board operates within this broader GambleAware context.

¹⁴ <https://www.begambleaware.org/sites/default/files/2020-12/briefing-note-november-2020.pdf>

Chapter I – Learnings

The initial impetus for the campaign, and the request to gambling operators and broadcasters to support it, came from a broader review of gambling undertaken by DCMS, rather than a specific focus on public health – although gambling harms have subsequently become formally recognised in public health terms and added to the PHE remit (initially for research).

Politically, gambling is a conflicted issue for any UK government – it is a legal activity, a matter of personal choice and public enjoyment, which raises taxes, as well as generating important revenues for sport and broadcasters. It operates in a relatively liberalised environment in terms of marketing and communications (2005 Gambling Act), and participation is increasing online, posing further regulatory challenges. In this environment the natural commercial drive of gambling operators has led to high levels of advertising and promotion, not least around sport, and especially football.

Historically, there has also been a tendency to frame gambling as a ‘responsibility’ issue – putting the onus on individuals as well as gambling operators to behave responsibly, with responsibility also put on operators to fund gambling treatment services. There has been a move towards more proactively creating a safer environment for gamblers (e.g. limit setting tools and exclusion tools), but the shift to a public health approach nevertheless challenged conventional thinking, especially amongst the gambling industry – even though in this case the focus is about gambling safely to help prevent harms, moderation rather than cessation.

There was also some mistrust amongst some industry stakeholders, with concerns that an independent GambleAware-led campaign would potentially denigrate gambling and damage their businesses commercially. In addition in 2018, there were competing agendas between different gambling operators, with those with land-based operations and purely online operators being represented by different trade organisations before the formation of a single trade body, the Betting & Gaming Council, in 2019.

In this context, getting alignment around what is a voluntary campaign with an independent public health approach, and a focus on behaviour moderation rather than just ‘responsibility’ or public information, was challenging. The challenge was exacerbated by there being no pre-existing success models for a campaign of this scope, anywhere in the world, to reference and build upon. This helps explain the campaign’s necessarily extended gestation period.

A key learning here is that in this type of context creating the necessary alignment to be in a position to start to make a difference takes time, a lot of engagement with a wide variety of subject matter experts, listening and negotiation.

CHAPTER 2: CREATING A PUBLIC HEALTH DRIVEN APPROACH AND DELIVERY

CAPABILITY – FEB. TO OCT. 2018

Setting the overall focus for the campaign

A focus on sports betting was supported by Gambling Commission data on gambling participation (behind only lottery and scratch cards) and those experiencing or at risk of harms – and also the intensity of operator marketing, advertising and promotional spend in this area.

Drawing on public health experience and expertise relating to campaigns in other areas, it was also clear that to have meaningful impact with the budgets available, it would be important to focus on those groups where risk of harms was most present – a broad public message about gambling risks in general would be highly unlikely to deliver any meaningful public health impact, especially on a relatively modest budget.

So upfront at the Safer Gambling Board's first meeting on 8 February 2018 it was agreed that the campaign would focus on younger male sports bettors, with a particular focus on those most at risk in terms of frequency of betting and propensity to exhibit risky behaviours such as chasing losses¹⁵.

Looking ahead the Board hopes to extend gambling harm prevention to other audiences, with work on the development of a campaign focused on women (especially those at risk from online gambling online) well-advanced.

Building capability

It was only in February 2018 that detailed work on campaign strategy and building the capability to develop and implement the campaign started. From DCMS the ambition was to launch activity by Autumn 2018 (in part to align with the new football season), imposing challenging a timeline given of a campaign that would be breaking new ground, that ultimately proved not to be feasible given the multiple stages of consumer research and creative development required.

This went beyond the scope of existing GambleAware campaign activities, so additional internal delivery capability had to be built, as well as brief and appoint relevant communications agencies, all at some pace. This was initially done with existing internal resource, with the help of a strategic consultant. In summary, the key steps here were:

- Brief an academic rapid literature review and expert view (Jan/Feb/March).
- Review and summarise relevant published data on gambling participation and risk of harms as support for a campaign brief (Feb/ March).
- Develop and agree an initial campaign brief with the Board (March/ April).
- Work with ISBA¹⁶ to identify a long list of potential lead communications agencies, with relevant public health campaign experience and no current gambling industry clients, and conduct 'chemistry meetings' with six agencies (Feb/ March).
- Brief a shortlist of three agencies (M&C Saatchi, Mother and 18 Feet & Rising) to pitch creative proposals (late April), with intermediate meetings in May and final pitches, including Board member attendance in early June.
- Agency (M&C Saatchi) appointed in late June.
- A media agency and agency to support grassroots activation were appointed later in the year, closer to launch.

¹⁵ NatCen data shows that 83% of problem gamblers are male, and 60% aged under 45.

¹⁶ ISBA (Incorporated Society of British Advertisers) is a leading trade body that includes help with agency/client relationships and agency selection within their services to members.

The initial agency brief (April 2018)

The brief developed from an analysis of available literature and data, and signed off by the Board, can be summarised as: to reduce the incidence of younger male sports bettors betting more than they can afford to lose, by being less impulsive in their behaviour and encouraging them to set limits.

Extracts from the full agency brief (April 2018):

Overall Policy Objective

Preventive – to promote safer gambling behaviours and, in particular, reduce incidence of occasions where younger male sports bettors bet more than they can afford to lose.

(NB. This campaign pays into and will support other more direct interventions – regulatory or voluntary – to set limits and help bettors do so via limit-setting tools....).

Marketing Objectives (EAST framework – understand and address barriers to change)

1. Encourage sports bettors to become more mindful – and less impulsive – by setting limits on their spend, making it easy to do this (arguably the biggest barrier to overcome).
2. Frame setting limits as attractive, creating a positive emotional framing; e.g. benefits in terms of (alternative uses for) the money or time saved.
3. Make interventions timely, being present close to/ during gambling opportunities around live sport in a highly distinctive way, standing apart from industry activity (avoiding their 'conventions'), capturing their attention through emotion, and developing consistent, long term 'brand assets' (e.g. THINK!, Talk to Frank, 5 a day).
4. Make it social – part of the younger male conversation, on and offline, create positive peer pressure.

Target Audience

- Younger men aged 18-34 betting frequently around live sport – both on and offline.
- Typically betting 2+ times a week, often much more, with a range of bets, incl. In-play, with 2/3 or more apps/ accounts, sports fans but bet beyond what they support/watch.
- Not problem gamblers (yet), but at-risk and may have experienced one-off episodes when they have spent more than they could afford.

The aim is to keep the campaign 'aperture' wide and be relevant to a broad audience of ordinary gamblers at risk to low-level gambling harms, not 'people with problems' (= not me).

Our Strategy – in summary

To reduce the incidence of younger male sports bettors betting more than they can afford to lose, by being less impulsive in their behaviour and encouraging them to set limits.

We will do this by making setting limits easy (simple, specific action), attractive (positive life benefits), timely (close to the gambling moment), and social. (Adding impact by encouraging operators to come on board, with timely 'set limits' prompts within their comms and apps.)

In terms of executional approach, we will be emotionally stimulating (prompting self-appraisal, not simply delivering information), personally relevant, highly distinctive (standing apart from, not joining in with, industry activity), anchored by 'safer gambling' brand assets.

Watch Outs

- There is no set 'limit', it will vary by personal circumstance. But thought should be given to developing 'rules of thumb' to help bettors set their own limits.
- We should not foster stigma or negative perceptions of people who experience gambling harms (counterproductive).
- Shock tactics or an over-serious or bleak tone unlikely to connect (activates 'othering') as long as it doesn't minimise risk.
- Unintended consequences – inadvertently making gambling more attractive to our target audience or others seeing communications around live sport (e.g. young adolescents).

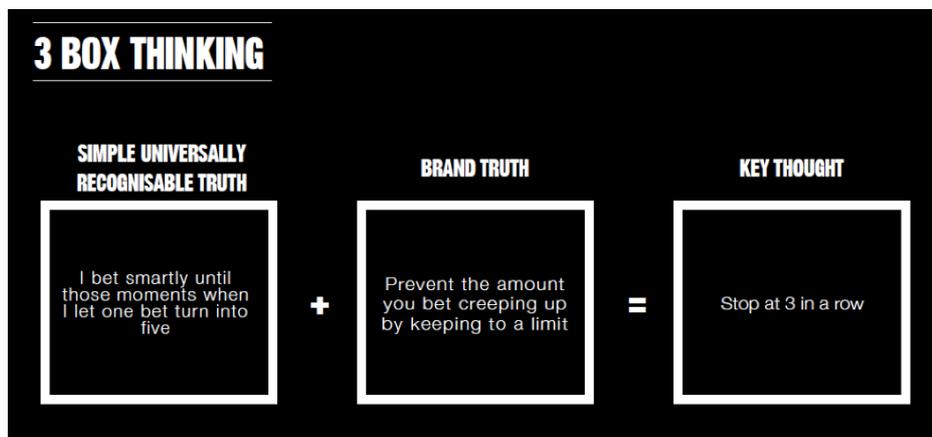
A detailed background briefing document was provided, summarising available evidence and insight, and also a number of supporting documents in their entirety:

- The Gambling Commission’s latest annual report (February 2018): ‘Gambling participation in 2017: behaviour, awareness and attitudes’ (plus technical annex)
- Gambling behaviour in Great Britain in 2015: Evidence from England, Scotland and Wales; prepared for the Gambling Commission by NatCen; August 2017
- Future Thinking: Responsible Gambling Campaign Development; November 2016
- Revealing Reality: Responsible Gambling: Collaborative Innovation Identifying good practice and inspiring change; 2017 (plus annex documents)
- Expert View - Responsible gambling public education campaign for Great Britain: A brief scoping review; prepared for GambleAware by Alexander Blaszczyński PhD & Sally Gainsbury PhD, Gambling Treatment and Research Clinic Science Faculty, Brain and Mind Centre, School of Psychology, The University of Sydney, January 2018
- Expert View on Influencing Gambling Behaviour from a Behavioural Science Perspective; Communications Science Group; Richard Chataway and Gonzalo Lopez Castellaro (with advice from Dr Mark Griffiths, Professor of Behavioural Addiction, Nottingham Trent University); March 2018
- Report on Senet Group Campaign Evaluation; October 2017

June 2018 – a false start

The Board was split in terms of response to the three creative pitches. At this point, there was some questioning on the original brief given to the agencies – especially from some members with an academic background – despite this having been signed off by the whole Board in advance. As covered later, the brief was subsequently revised.

The creative proposals initially favoured by the majority was from M&C Saatchi (summarised below) and built strongly on brief and public health campaign learnings, laying down a clear guideline to help frequent bettors moderate their behaviour – ‘Stop at 3 in a row’, analogous to ‘5 a Day’ for instance:



This had researched well with the target audience (in pilot agency research), but in broader consultation raised fundamental concerns (relating to the initial brief as much as creative proposals):

- It risks normalising that ‘3’ is acceptable, and indeed encourages lighter bettors to bet more.
- Whatever the chosen number, there is no safe level that the academic and health community could align around based on ‘the science’, in the way that messages like ‘5 a Day’ or limits for weekly units of alcohol, although approximate, could be endorsed.
- Any challenge (explicit or implicit) to ‘stick to limits’ risks unintended consequences amongst some risk-taking young males.

For these reasons it was decided not to proceed with proposed approach, but to appoint M&C Saatchi on the basis of their strong public health campaign experience – initially on a project basis – to work with the Board on a refined strategy (and Logic Model), and execution of it. Soon after this a dedicated Campaign Director was added to the GambleAware delivery team.

Chapter 2 – Learnings

This initial work produced many valuable learnings in a relatively short time about what might - and might not - work. The decision was made to take a step back to build on this work, to consult more broadly than time constraints had initially permitted, and undertake a stepwise approach guided by a number of stages of research with the target group of younger male bettors – still at pace but not constrained by a set deadline.

It was recognised that this was a difficult communications challenge, with no existing success models to build directly on. Getting to an effective campaign solution, and alignment around it, would require a thorough and iterative process.

The desire to proceed at pace was understandable, but had not allowed time for consumer research, or as full a consultation with subject matter experts as would have been desirable to get to the right strategy.

There was also a major challenge in terms of aligning stakeholders – and indeed different views on the campaign that was subsequently developed still exist and are intrinsically hard to fully resolve. The ‘North Star’ for all decisions remains a public health approach, and how the bettor target audience responds.

For instance, those with hands on public health campaign experience often having rather different views on solutions from those in academia. Some of those in academia operate explicitly or implicitly on a ‘tobacco control’ model for public health issues, with a ‘playbook’ that works towards high levels of regulatory restriction, even prohibition, and precludes any industry engagement however arms-length. These were issues outside of the Board’s immediate scope, and while gambling operators and broadcasters have no involvement in campaign direction and decision-making, some engagement is necessary – not least because they are currently the only significant source of campaign funding.

The self-imposed requirement to stay independent of gambling operators presents its own challenges, as they obviously play an important part in creating a safer gambling environment via their actions and communications around delivery of their products (in app, online, in physical locations, in their media communications).

Creating alignment between the independent Bet Regret campaign and operator safer gambling activities remains an area where progress has been slow.

CHAPTER 3: CAMPAIGN DEVELOPMENT STAGE I, LEADING TO 'BET REGRET' – OCT. 2018 TO FEB. 2019

From July 2018 – refining the strategy

A number of steps were undertaken, to some extent in parallel, on the journey to a refined brief:

- Consultation meeting with a broad-based advisory panel, including service users, GamCare, Church of England, Royal Society of Public Health, ISBA and gambling operators (July 2018).
- Meetings with a number of subject matter experts, including academics who have worked with DrinkAware on analogous communications issues (July – Sept. 2018).
- A major segmentation study with over 2000 frequent male gamblers (YouGov – Sept. 2018).
- A first stage of consumer research using alternative strategic concepts to explore the best way to communicate with frequent gamblers, to prompt them to self-reflect and ultimately moderate their gambling behaviour (The Nursery – 4 focus groups – Sept. 2018).

YouGov/GambleAware Frequent Gambler Segmentation Study

This study explored the behaviours, attitudes and profile of frequent male bettors in some depth, providing valuable insights that helped guide the development of the campaign strategy.

It comprised a quantitative survey of 2,097 men aged 16-45 in the UK who have gambled (bet online or in person on sports, or online casinos) in the last four weeks. Fieldwork was undertaken between the 17 August and 5 September 2018, with figures weighted to be representative of the UK male gambling population by age, region and social grade.

An important part of the analysis was a segmentation of frequent bettors based on gambling attitudes, perceptions and behaviours. Six segments were identified following a factor analysis to identify key discriminating variables, then a cluster analysis of respondents based on these variables.

Three of these segments (comprising 31% of the total sample) were identified as a key focus for any intervention, comprising 42% of all gambling 3+ times a week, and 87% of those scoring as high or medium risk based on PGSI problem gambling indicators, with reasonable numbers expressing readiness to cut down:

- **Segment A (10%):** Gamble more than others to relax and escape from the stresses of life – currently bet frequently, often exhibiting risky behaviours, such as chasing losses (High Risk).
- **Segment B (10%):** Tend to struggle with gambling as they often do with other things in their life – low ability to delay gratification (Higher Risk).
- **Segment C (12%):** Regular bettors across sports, more than others seeing it as a test of their knowledge and skill – but still displaying sometimes risky behaviours (Medium Risk).

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

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

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

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

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

- **Segment D (23%):** Regular but more moderate bettors – some risky behaviours but, with reasonably high self-efficacy, generally in control of their gambling and finances.
- **Segment E (24%):** More occasional bettors, mainly on football, mainly for fun – low risk of suffering gambling harms based on both behaviour and personality.
- **Segment F (21%):** Least frequent and lowest risk group, happy to dabble occasionally with no concerns about their gambling.

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

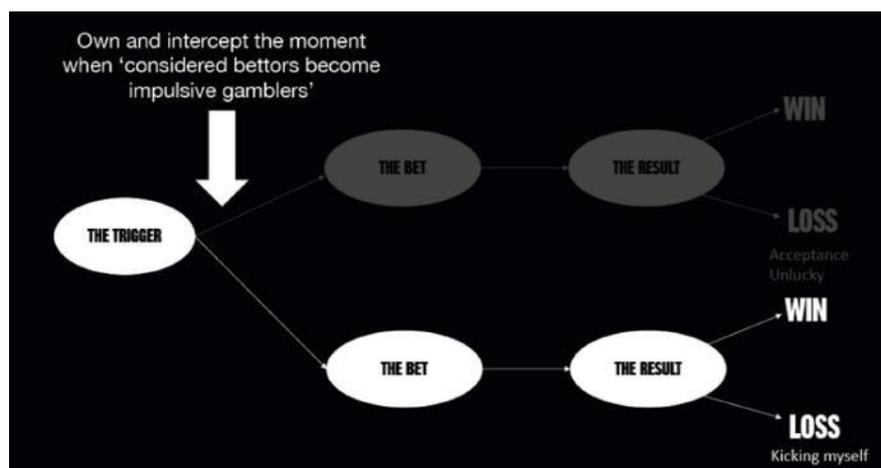
Insight to build upon

This came from both exploratory research with the target audience (The Nursery – Focus groups – September 2018) and meetings with subject matter experts, with the inputs from Professor Antony Moss, building on his work with DrinkAware¹⁷.

The Nursery research report concluded:

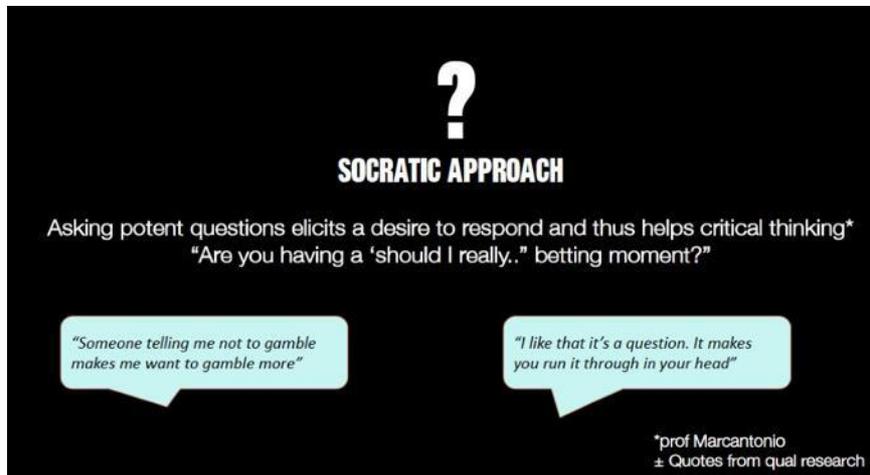
1. Finding a universal truth for betting behaviour feels hard to do – (for instance) one man’s ‘mug bet’ is another’s big opportunity
2. But there do seem to be universal emotions experienced by everyone on their betting journey
3. We believe that the potential lies in **bets that you kick yourself for** – rather than the bets (that could be rationalised as simply) bad luck or a long shot
4. This needs to be expressed appropriately: so gamblers do not feel lectured – adult to adult, rather than parent to child

The opportunity for preventative intervention resides in helping to cut out the ill-considered, impulsive bets that people make in the heat of the moment – often fuelled by loss chasing behaviour, boredom, or alcohol. The bets that people instinctively know that they really should have made, and kick themselves for, the moment that they have made them.



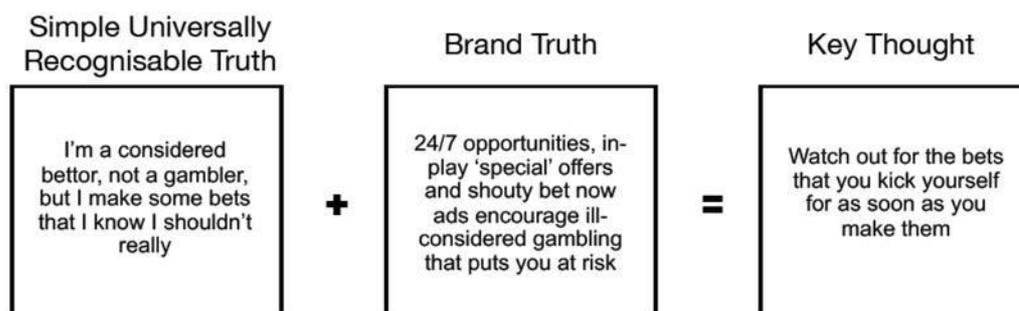
¹⁷ Professor Antony C. Moss, BSc (Hons), PhD, Professor of Addictive Behaviour Science and Director of Education & Student Experience at the School of Applied Sciences, London South Bank University

Experts in counselling those with compulsive disorders emphasised the importance of stimulating self-reflection to help develop self-awareness in predisposing people to self-regulate their behaviours. They proposed the ‘Socratic approach’ as a proven way of engaging those potentially risky betting behaviours:



Creative development – from October 2018

This insight led to a brief for creative development summarised as follows in M&C Saatchi’s three Box format:



A number of creative routes were developed from this brief and tested and refined via two further stages of qualitative research with the target group (The Nursery - Focus groups – November 2018 and February 2019).

It was from this that the idea of ‘Bet Regret’ was developed and validated, through a range of creative executions, bringing to life the universal feeling of regret we all get the moment we make an ill-considered bet.

This was brought to life in situations where impulsive, ill-considered bets are most likely to be made leading to the experience of Bet Regret:

- When chasing losses
- When drinking
- When betting on things we know little about
- When bored

Research showed that:

- The idea of Bet Regret was easily understood
- ‘The bet you wish you had not made’
- The situations portrayed were realistic and relatable in terms of familiar occasions when ill-considered bets can be made

In parallel with this process and subsequent production of campaign materials, the challenging process of securing funding was commenced and media plans developed. Broadcasters donated a substantial proportion of the media buy in kind (as airtime, but guided by our independent media planning process) meeting their commitment to provide £1.6m media inventory each year, with Google promising \$1m although only £400,000 was subsequently committed. Creative and media details are provided in the next Chapter.

Anchoring our risky campaign strategy via a clear Logic Model (November 2018)

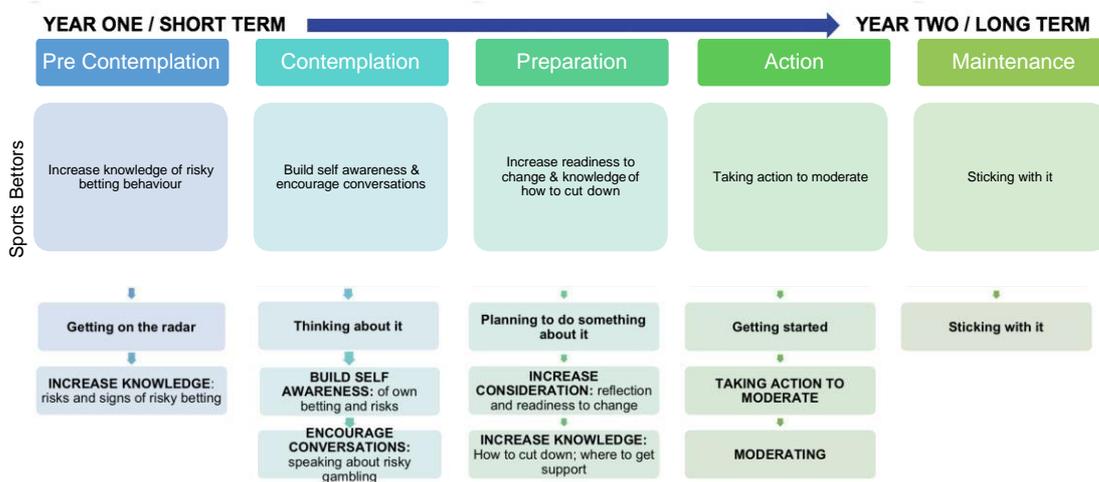
The Board was clear from the outset that the overall public health objective that the campaign pays into is to help moderate the gambling behaviour of risky sports bettors¹⁸, recognising that any campaign is only one of several factors influencing the target group.

Specific Campaign objectives were formalised as:

- Year One: To shift attitudes and provoke conversation amongst the target group on the moderation of sports betting, through the avoidance of impulsive, risky behaviours such as chasing losses in the heat of the moment (Broad audience).
- Year Two: To increase the numbers of risky sports bettors taking steps to cut down their gambling, both generally and by deploying specific moderation techniques and aids (Behaviour Change audience – more frequent bettors).

In November 2018, this was formalised in an explicit Logic Model to help guide the development of the campaign, and provide a framework for measurement of campaign impacts over time:

BET REGRET LOGIC MODEL



This crystallised the thinking that had informed our approach since the project commenced in February.

¹⁸ Currently defined as young men (16-34) who gamble 2 or more times a week, who bet online and who bet on football.

Related key performance indicators were:

Attitudinal/ Awareness – KPIs

- Increase in consideration of steps to moderate my betting
- Increase in ‘with more and more opportunities and prompts to bet, you have to take more care to stay in control of your betting’
- Increase in thinking more about my betting and learning from my mistakes
- Increase in awareness of the negatives of impulsive bets
- Increase in conversations about moderation of gambling (generally, yours, others)
- Media coverage/ social listening around moderation of betting/campaign themes

Behavioural

- Increase in numbers making efforts to reduce their betting
- Increase in uptake of moderation techniques (both personal and external help) – both reported via research and operator data
- Increase in ‘cutting out more impulsive, less considered bets that I shouldn’t have made’
- Uptake of any visibility/ moderation tool we develop

Ipsos MORI Campaign Tracking

The rigorous measurement of campaign impact – with measures relating to the various elements of the Logic Model – is a central plank of a public health approach. Regular measurement and reporting of campaign impact, attitudes and behaviour is undertaken by Ipsos MORI, with a baseline measure taken in November 2018 (7 waves to date, ongoing).

The overall design of the survey in terms of sample design and core questions has remained consistent to maintain comparability in terms of measuring trends and the impacts of specific elements of campaign activity – although there have obviously been some questionnaire changes relating to the evolution of campaign activity over the past two years.

The key attitudinal and behavioural measures and questions asked are summarised overleaf¹⁹:

		Year 1-2			Year 2-5	
		Pre Contemplation	Contemplation	Preparation	Action	Maintenance
Message	Task	Increase knowledge of risky betting behaviour	Build self awareness & encourage conversations	Increase readiness to change & knowledge of how to cut down	Taking action to moderate	Sticking with it
		You'll BetRegret it	You'll BetRegret it	Tap out for timeout and avoid Bet Regret	Tap out for timeout and avoid Bet Regret	TBD
Attitudinal & Behavioural measures	Key audience: Campaign audience	<ul style="list-style-type: none"> • With more and more opportunities to gamble, it's easy to get drawn in to make impulsive bets (Q9) • It's now so quick and easy to make bets on a mobile phone, it's important to take care to avoid bets you regret the moment you make them (Q9) • If you gamble or bet it's really important that it does not interfere with your job or other day-to-day commitments (Q9) • I would know the early warning signs that someone might be gambling or betting too much (Q8) • I am aware of the harms of gambling and betting more than I can afford (Q8) 		<ul style="list-style-type: none"> • I am thinking more about how much I gamble or bet than I used to (Q8) • I sometimes make bets I know I shouldn't (Q8) • I sometimes make impulsive bets in the heat of the moment (Q8) • Sometimes I make bets that I regret the moment that I have made them, even before I know whether I've lost or not (Q8) • Have been spoken to about spending too much time or money gambling or betting (Q11b) • Have spoken to somebody, even jokingly, about them spending too much time or money gambling or betting (Q11a) 		
	Key audience: Behaviour change audience	<ul style="list-style-type: none"> • I sometimes I think I should cut down my gambling (Q7) • I intend to cut down my gambling in the near future (Q7) • If I wanted to cut down my gambling in the future I would close or "tap out" of my betting app and pause before deciding whether to place a bet to cut down the amount of gambling I do (Q31b) • I know how to cut down my gambling if I want to (Q7) 		<ul style="list-style-type: none"> • I try to close or 'tap out' or my betting app and pause before deciding whether to place a bet (Q8) • I have recently cut down my gambling (Q7) • I am actually changing my gambling habits to cut down or stop (Q7) • I close or "tap out" of my betting app and pause before deciding whether to place a bet to cut down the amount of gambling I do (Q31a) • Reduction in risky gambling behaviour: Bored / Chasing / Sport you don't know (Q4) • Reduction in money spent on gambling compared to 3/12 months (Q5) • I make less bets I regret than previously (Q7) 		
						TBD

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

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

Seven waves of research have been conducted to date:

1. Baseline – November 2018,
2. Post the first burst of Bet Regret TV – May 2019
3. Pre the second burst of Bet Regret TV – July/ August 2019
4. Post the second burst of Bet Regret TV – Sept/ Oct. 2019
5. To measure status after several months of digital-only Bet Regret activity (and immediate impacts of the coronavirus lockdown – with no live sport) – April 2020
6. Pre the start of 'Tap out for time out and avoid Bet Regret', but with some digital-only Bet Regret activity continuing up to this point (as well as ongoing impact of coronavirus, live sport returning in July) – August 2020
7. Post the first TV burst of 'Tap Out' – November 2020

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

Chapter 3 – Learnings

Taking the time to allow for the more considered approach from July 2018 (albeit building on valuable learnings from the deadline-driven process February to June), was important in getting to a well-validated approach, and alignment on it.

It allowed for the broad consultation needed, but also to move from the theoretical to the practical by testing and refining approaches with the target group.

The literature (fairly limited in this case) and wide engagement with subject matter experts is valuable in terms of developing hypotheses to test, and also awareness of potential pitfalls or unintended consequences (for instance in this area ‘othering’ is an ever-present danger, with the target group dismissing an over-emphasis on risks as being not relevant to ‘people like me’, rather aimed at ‘people with problems, not me’).

However, there is no substitute to listening and testing ideas with the target group in consumer research, in an iterative ‘test and refine’ (or reject) way – which takes time, and so were not feasible in the initial stage of development.

Key learnings for future projects (and stages of this campaign) include realistic timings allowing for a more orderly process:

- Follow a stepwise process, and allow realistic timings to execute that
- Undertake a full scoping exercise gathering existing learnings, stakeholder and subject matter expert views (generally requiring 3-4 months minimum), and develop a prototype Logic Model (possibly to be refined later) before moving to campaign development
- Working with a communications agency, take forward the key hypotheses relating to effective interventions and messages – and ways of engaging the target group with these – in a multi-stage programme of consumer research
- Regular ‘check ins’ on progress between the Campaign Director and Chair of the Board, between quarterly Board meetings

These learnings were also applied to the development of Stage 2 of this campaign.

They have also been applied to a potential campaign specifically aimed at preventing gambling harms amongst women. For this a detailed scoping exercise was undertaken earlier this year, a Logic Model agreed, a first stage of strategic research with a broad range of ‘at risk’ female gamblers was undertaken, and creative ideas tested and refined in further research.

CHAPTER 4: BET REGRET CAMPAIGN STAGE I IMPLEMENTATION AND IMPACTS – from FEB. 2019

Stage I Bet Regret in summary

- Two bursts of TV advertising – with three TV executions run in more or less equal rotation – end of February to April, and August/ September 2019; also limited presence on targeted posters (football grounds, pub screens)
- Films also ran on YouTube from March – December 2019, and on the Sky Sports app August/ September 2019
- Media partnership with LADBible, August – October 2019
- Programmatic digital and social media (Facebook, Twitter, Instagram) from March – Dec. 2019
- Radio (TalkSport) August – December 2019
- In social media only, a new series of executions using Bet Regret ambassador David James was introduced from September 2019, running through to August 2020
- There were a number of additional activities during 2019 to stimulate PR and drive grassroots engagement (described below)

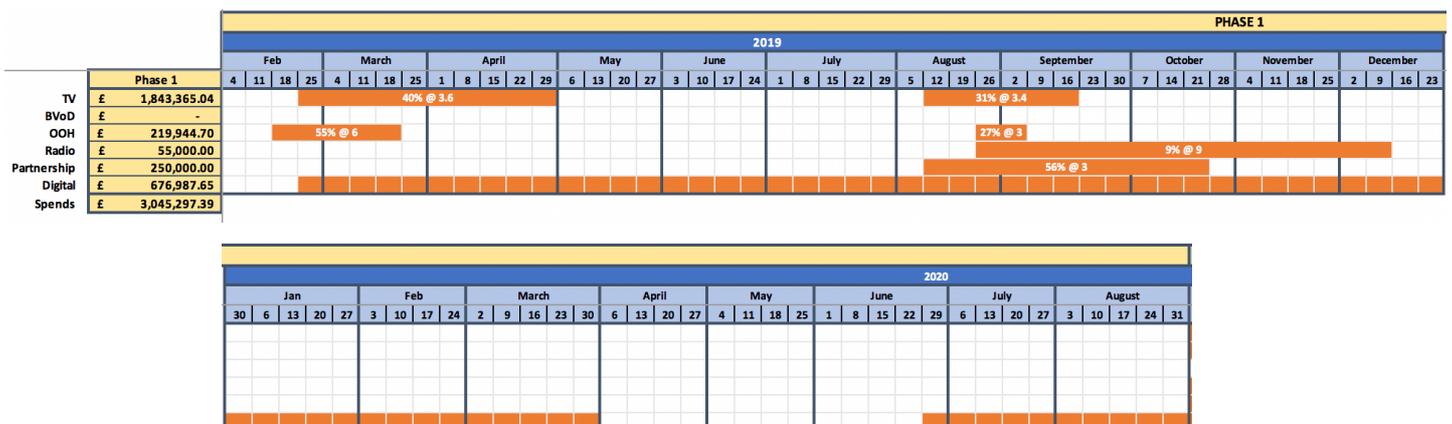
There was a moderate weight presence in online and social media only in Jan – March and July/ August 2020. The original plan was to move to Stage 2 of the campaign – behavioural ‘nudge’ focus – by April 2020, but this was postponed to September due to the coronavirus outbreak (inappropriate to run given the suspension of live sport).

In summary:

- A total media spend of c.£3.1 million – of which c.£1.9 million was donated as media space, but planned to meet the same media targeting needs as paid for media.
- The budget split was: TV 57%; YouTube 12%; LadBible 7%; Posters 6%; Radio 3%; Other (digital and social media) 15%

Media planning was focused on maximising exposure amongst the hard to reach audience of males aged 16-34, mainly around live sport and other sporting context and content, where sports betting would be front of mind. The media used guaranteed exposure to a much broader audience of both gamblers and influencers.

Media Laydown – Stage I – Bet Regret



Creative Executions

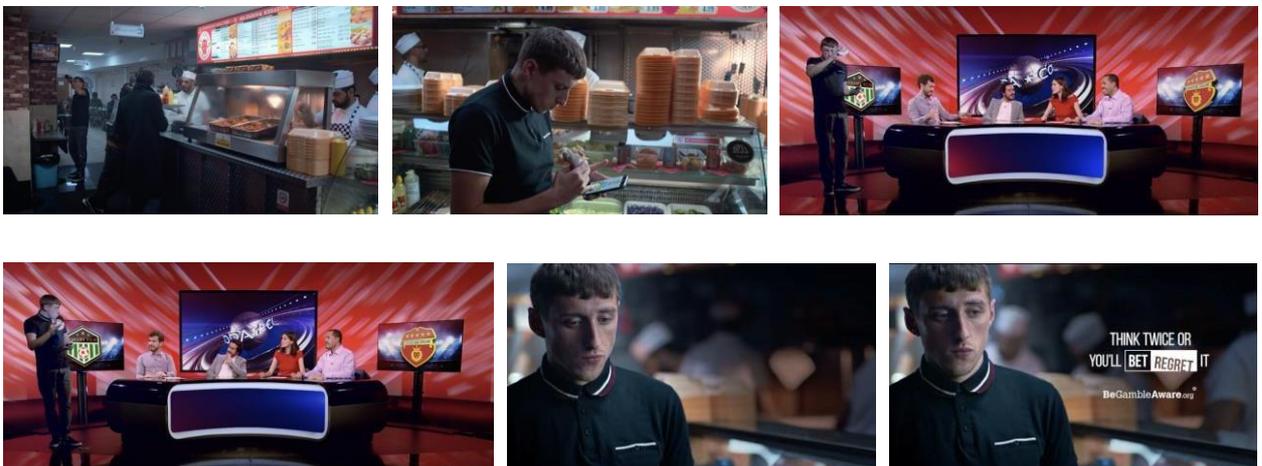
One spot ('Drunk') features an inebriated man in a kebab shop toying with the idea of betting on a central American Cup fixture. He is instantly transported to a TV studio in Panama where he is mocked, in Spanish, by the local pundits for considering a bet given his lack of knowledge of the teams involved.

A second ('Chasing Losses') reveals a man furtively moving from sofa to kitchen to avoid his partner discovering a recent betting loss. As he seeks to chase his losses, he finds himself pitch-side at QPR's Loftus Road stadium, being interrogated by BT Sport's Matt Smith and former Welsh internationals Dean Saunders and Danny Gabbidon.

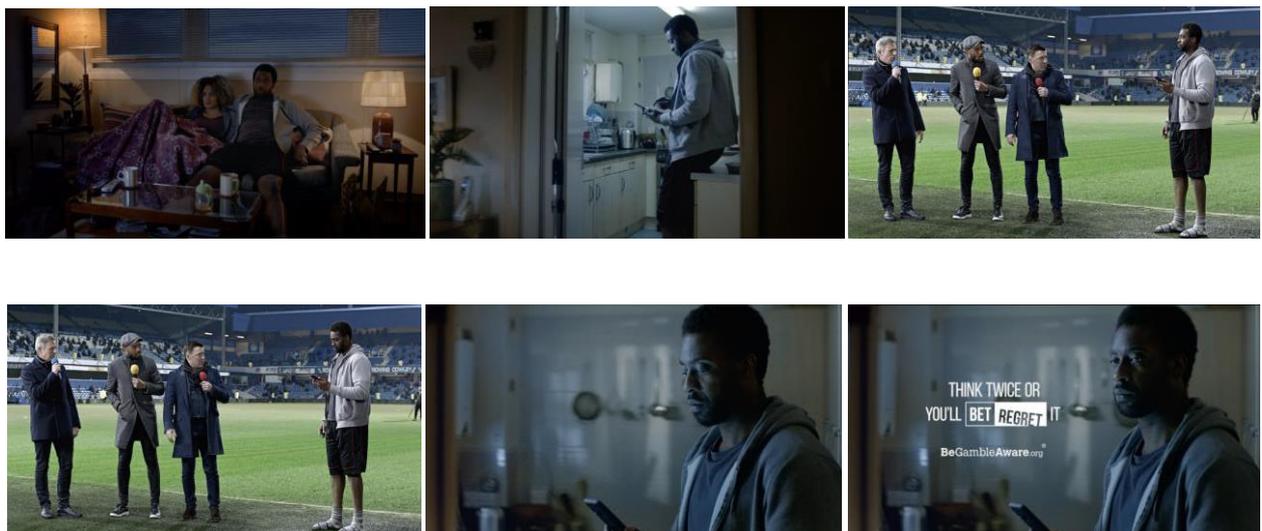
The final spot ('Bored'), focused on horse racing, sees a bored office worker placing a bet while at work.

Essentially the same core content ran across the first two bursts of activity, except that in the second burst a more behavioural nudge was added to the end frame – 'You'll Bet Regret It' became 'Think Twice or You'll Bet Regret It' (otherwise executions remained the same). This change was validated as part of focus groups conducted by The Nursery in July 2019 to assess response to potential radio commercials added to the mix from August.

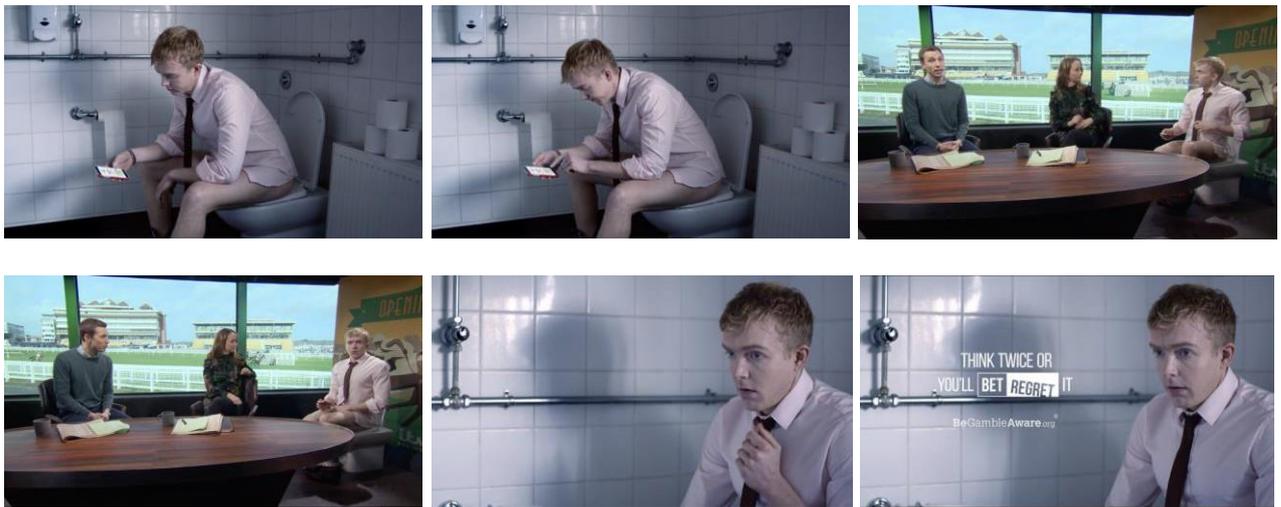
Drunk:



Chasing Losses:

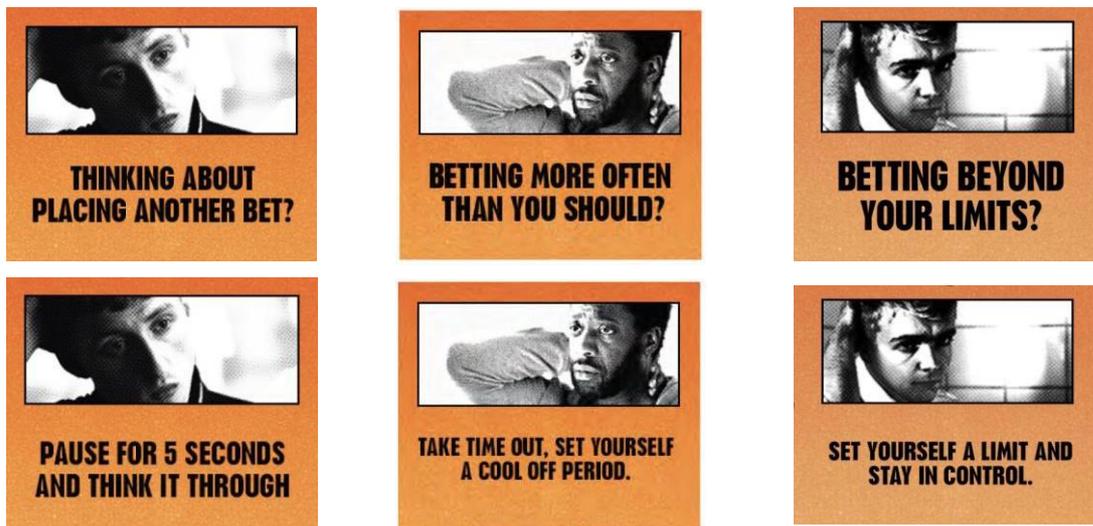


Bored:

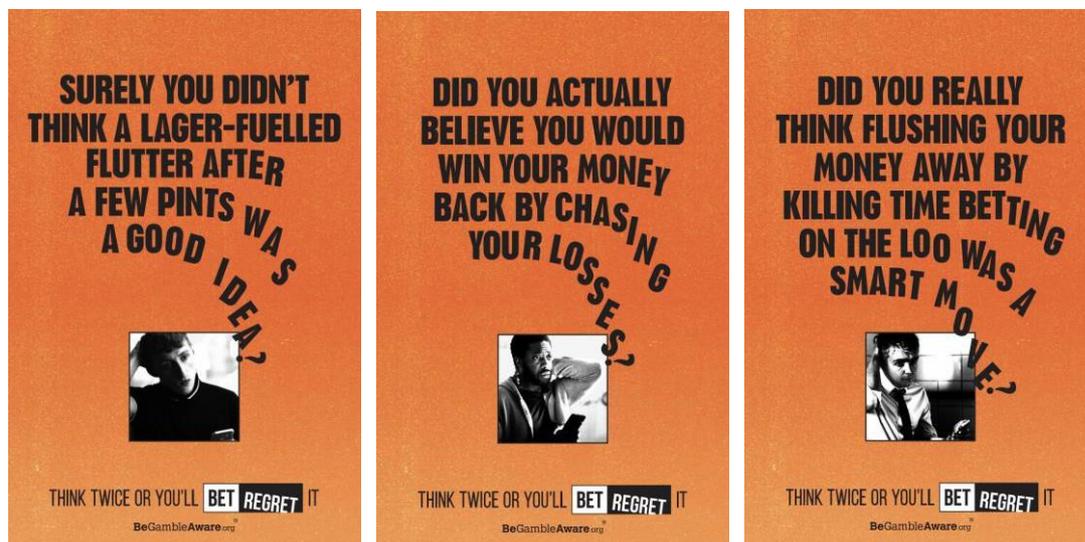


The three themes from the TV were also broad to life in digital, posters and social media:

Digital:



Posters:



Social:

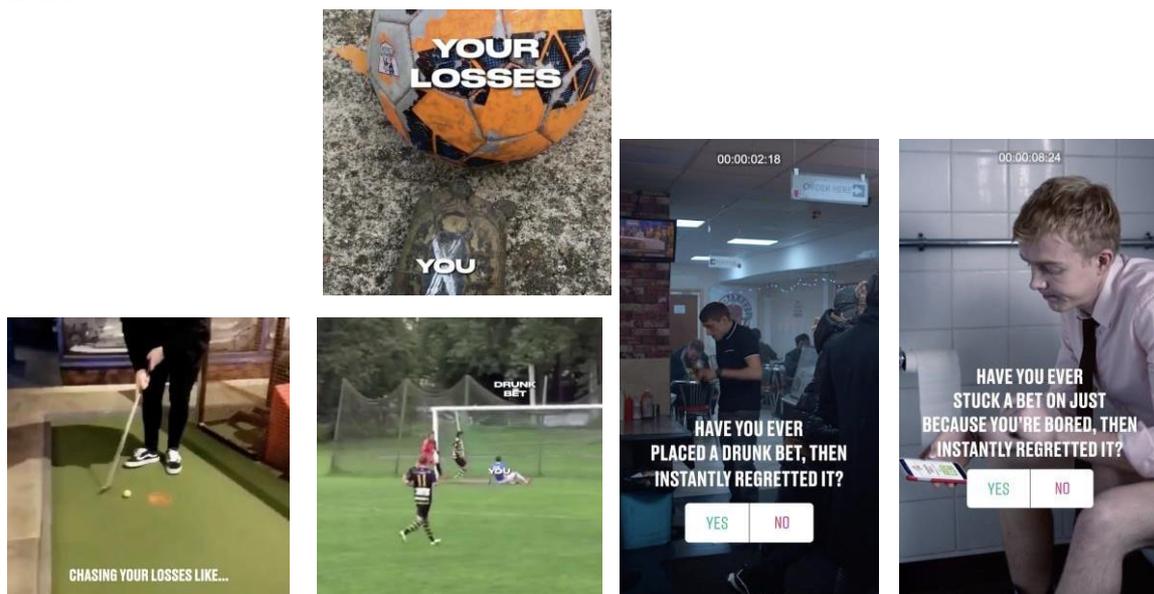


Peer-to-peer social gifs:



LADBible repurposed a some of this work in ways to engage their followers, as well as creating their own content to deliver the Bet Regret message:

LADBible Content:

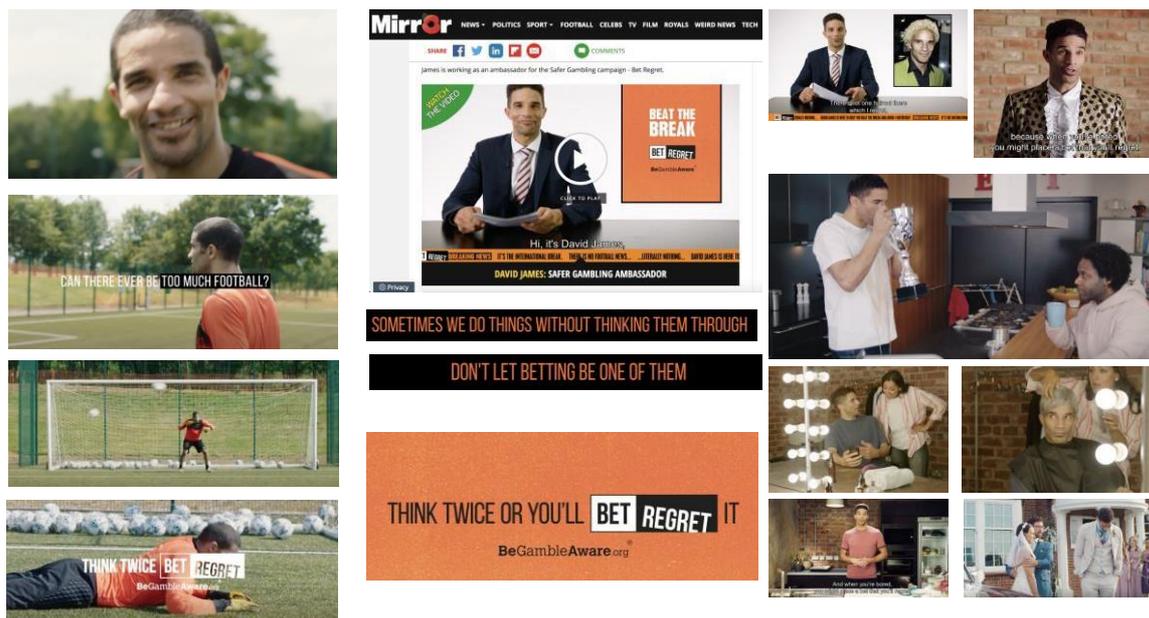


LADBible Reflective Stories



To help extend the campaign from September 2019 a series of films using Bet Regret ambassador David James were run in social media:

To help extend the campaign from September 2019 a series of films using Bet Regret ambassador David James were run on social media:



Activation activity

These communications were supported by grassroots activity, an important element in any public health campaign. Ideas here were tested alongside the advertising communications in focus group research in terms of their potential to insert our message into the everyday lives and behaviours of our target audience, to generate conversations and additional PR. The Barber Tour was specifically targeted at connections and encouraging conversations with university students, a hard to reach sub-audience often bypassed by traditional media.



No Bet Inn



Barber Tour



Bet Regret Cup



FSA Survey & Awards

No Bet Inn was designed to help drive PR and social posts around the launch of the campaign. The pub is our target audience's most frequented location, and a common place for in-play, with a drink, watching the match on TV.

This involved taking over a pub in Liverpool and rebranded it the 'No Bet Inn' – using ex-Liverpool footballer, Luis Garcia, to host the event, at which fans were able to put their phones in sealable Yondr pouches and avoid betting whilst drinking. This was used to amplify the Bet Regret message through press releases and media interviews (leading to 13 coverage pieces), social posts, video and still social content.

This generated 18.1m impacts, 3848 digital engagements and 129 in-person conversations. 70% of participants said they are less likely to place bets that they will immediately regret after our activation; 72% said they would speak to a friend or family member about Bet Regret.

The Barber Truck Tour was designed to get into our target audiences trusted one-to-one conversations, and was positively received by the target audience in research.

The Bet Regret Barbershop was targeted primarily by university students, and toured the UK, offering free haircuts to sports bettors in exchange for a conversation with our trained barbers about their betting behaviours. Impact was amplified by geo-targeted social media posts ahead of each event; local, University and regional media engagement; University channels and media.

This generated 173000 impacts and 3104 in-person conversations.



The Bet Regret Cup took the message close to our target audience's lives and passions – over half play football regularly, and 87% regularly watch.

The campaign partnered with PowerLeague to create a nationwide 5-a-side tournament with 26 regional heats, with each regional winner having the chance to take on the #BetRegret 5-a-side of ex-England internationals at the Finals Day in London. The message was amplified through PowerLeague's channels and regional centres, social channels, Cheeky Sport hosting and social content, and media interviews.

Finals day took place on 4th August, with talent including David James, Paul Konchesky, Carlton Cole, Shaun Wright-Phillips and Joleon Lescott, managed by Sol Campbell. 170 teams across the country entered, with 26 branded regional centres hosting tournaments and 1,000 engaged players. This generated 160 pieces of coverage pieces and a total of 395m impacts, with 195000 video views of content.

An ongoing partnership with the **Football Supporters Association** provides a platform to engage with football fans. FSA frequently survey their members, and the campaign partnered with them on a member survey on football and gambling. 90% of football fans surveyed believe their clubs are not doing enough to educate their fans on the risks associated with problem gambling; only 13% said they would be happy for their club to be sponsored by a gambling company.

The results of the survey were widely promoted, with coverage generating 13.4m impacts.

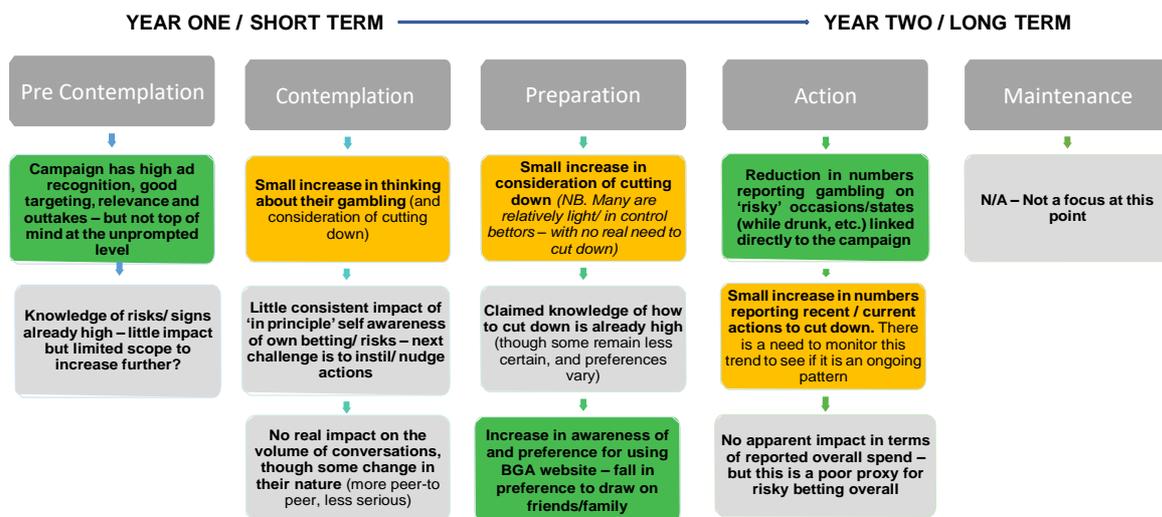
The annual FSA awards helped spread the Bet Regret message, which launched the Safe Hand Award in association with BeGambleAware, with the shortlist chosen by Bet Regret ambassador David James, and a speech from GambleAware CEO Marc Etches on the evening.

Campaign Impacts

Waves 1-4 of the Ipsos MORI tracking data are covered here, as these cover the majority of Stage 1 campaign spend and impacts (Feb. – Oct. 2019. Campaign spend for this period was £3.3m, which represents an estimated 2.6% share of voice in terms of all sports betting advertising.

In the context of the Logic Model, impacts for this period can be summarised as follows:

Bet Regret Stage 1 – Wave 1 – 4 Summary of Impacts



Expanding on this:

Campaign recognition is high, well-targeted to those most at risk who rate it as engaging and relevant, message outtake is strong²⁰

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

The LADBible media partnership was cost-effective with 41% recognising related content at Wave 4.

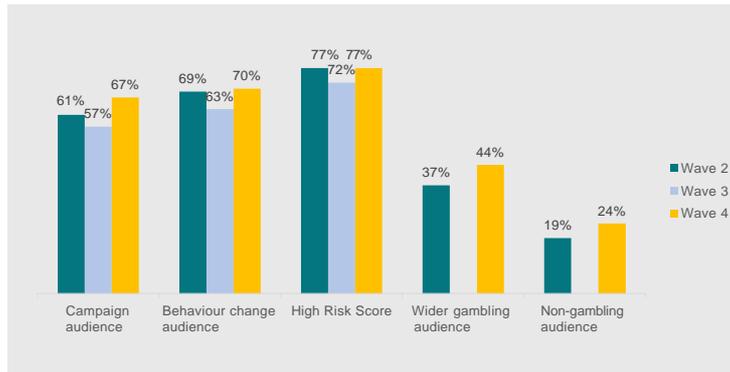
The campaign scores well on being believable (67% at Wave 4), memorable (62%), relatable (58%), entertaining (49%) and relevant to me (49%).

²⁰ All figures relate to the Campaign Audience of frequent male bettors aged 16-44, betting on sports or online casino in the past 4 weeks, unless indicated otherwise. Given sample sizes (600 per wave) shifts between waves should be seen as directional/ indicative only.

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

Campaign continues to be well targeted, with growing reach across all groups

Campaign recognition by audience - % recogniser



- Our indicative norms of other national TV led campaigns point to a range in recognition of 57%-72%.
- Compares well to WTFSS metrics at the same stage – WTFSS 'recognition' was 56% nine months in amongst regular gamblers, and 36% amongst all adults.

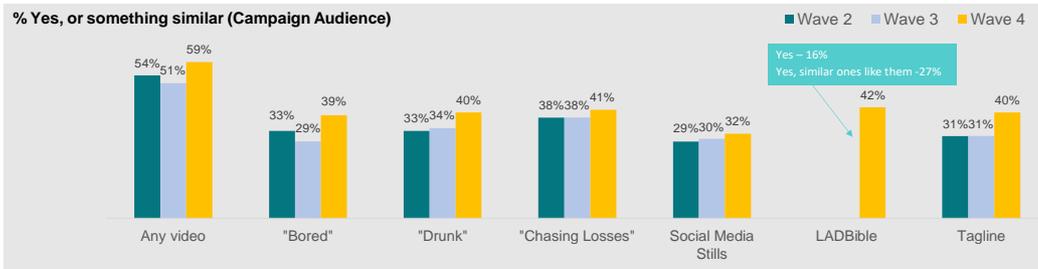
Base sizes: Campaign Audience (600), Behaviour change audience (Wave 2 – 391, Wave 3 – 340, Wave 4 – 345), Wider Audience (wave 2- 607 and wave 4 - 556), Non-gambling audience (Wave 2 – 388 and Wave 4 – 438)

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Ipsos MORI Ipsos

Prompted recognition of TV and digital video is high, with significant jump in recognition of tagline



Changes in audiences from wave 2 (previous post-campaign survey)

	+5	+7	+7	+3	+1	N/A	+9
C Audience							
B. Change	+0	+2	+7	+0	-5	N/A	+4
Wider	+7	+7	+7	+6	+4	N/A	+5
Non	+6	+6	+4	+3	+0	N/A	+0

Base sizes: Campaign Audience (600), Behaviour change audience (Wave 2 – 391, Wave 3 – 340, Wave 4 – 345), Wider Audience (wave 2- 607 and wave 4 - 556), Non-gambling audience (Wave 2 – 388 and Wave 4 – 438)

Source: Ipsos MORI online survey

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Ipsos MORI Ipsos

Outtakes are strong - "Think Twice" coming through but additions might lead to some dilution of focus on Bet Regret

Q29. Still thinking about the video and images you have just seen, which of the following, if any, do you think the key messages they are trying to get across are?

Channel	% Campaign audience who select each outtake (top 10)	Difference from Wave 2	Difference from Wave 3
You shouldn't let your gambling get out of control	42	+5	-3
You shouldn't bet when you have been drinking too much	42	+2	+4
It's easy to get drawn in to make impulsive, ill-considered bets	37	-8	-3
You shouldn't make bets that you will immediately regret	37	-10	-1
You shouldn't chase your losses	37	-2	-1
Think twice before you make a bet	35	N/A	+4
You shouldn't bet when you are bored	34	-4	-4
You can contact BeGambleAware if you need help, support or advice	32	+7	-3
There are some bets that you regret the moment you make them	31	-4	+4
You shouldn't bet on think that you don't know much about	31	-6	+2

- Increase in take out on Think Twice (+4%)
- Increase (+3%) saying ads made them think about betting / want to bet less

Directional increases in numbers of frequent bettors reporting that they are thinking more about their gambling and considering cutting down

These increases should be treated as directional only, but are in line with campaign strategy and reflect broader patterns within the data. It should also be noted that for many of our Campaign Audience our message is precautionary, with those currently gambling moderately having no immediate need to consider or moderate their behaviour.

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

Directional increases in numbers reporting actions to cut down, and reductions in those reporting in gambling in risky situations/ states linked directly to the campaign

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

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

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

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

Overall this data shows fairly high levels of ‘in principle’ awareness of risks and knowledge about how to cut down – and also a high level of receptiveness to pausing and ‘thinking twice’ (with 64% at Wave 4 saying ‘I try to think twice before I make a bet’).

A key challenge therefore is to help translate this awareness and receptiveness into behaviour change via specific nudges and mental aids that help people gamble more safely – in line with the pre-determined shift in focus for Stage 2 of the campaign.

Maintaining Bet Regret awareness through 2020

The main weight of Bet Regret activity ended in November. An awareness dip in November 2019 showed that the David James films running at a moderate rate on social media were effective in maintaining awareness. This activity was continued through much of 2020 (Jan – March, and late June – August) to help maintain a good base level of awareness until the COVID-postponed launch of Stage 2 of the campaign.

Campaign recognition was maintained at good levels – at 57% amongst the Campaign Audience in August 2020 (Wave 6), not far below the October 2019 (Wave 4) peak of 67%. This was substantially driven by the David James activity which achieved 41% recognition at Wave 6 (rising to 43% amongst the Behaviour Change Audience and 57% amongst the Highest Risk bettors) – showing the power of celebrity endorsement to cut through even on a modest budget.

Chapter 4 – Learnings

The Bet Regret campaign achieved high levels of recognition and engagement, despite a budget dwarfed by the total communications spend of gambling operators (representing an estimated 2.6% share of voice of the sports betting category). The David James activity showed the power of celebrity endorsement to cut through even on a modest budget (a learning to be built on in Stage 2).

With ‘in principle’ awareness of risks already high amongst regular sports bettors, the main shifts we observed were in fact closer to the behavioural end of the Logic Model – with directional increases in the number of bettors considering cutting down, and decreases in numbers reporting behaviours we regard as risky. It is significant that implicit warnings about the risks of betting via the Bet Regret-inducing scenarios featured (when chasing losses, drinking, betting on things we know little about, or when bored) have directly impacted on reported behaviour.

It reinforces a general learning that, while emotional engagement may be a necessary precondition to behaviour change, behavioural response is also dependent on more concrete suggestions of what we want people to do, and not do.

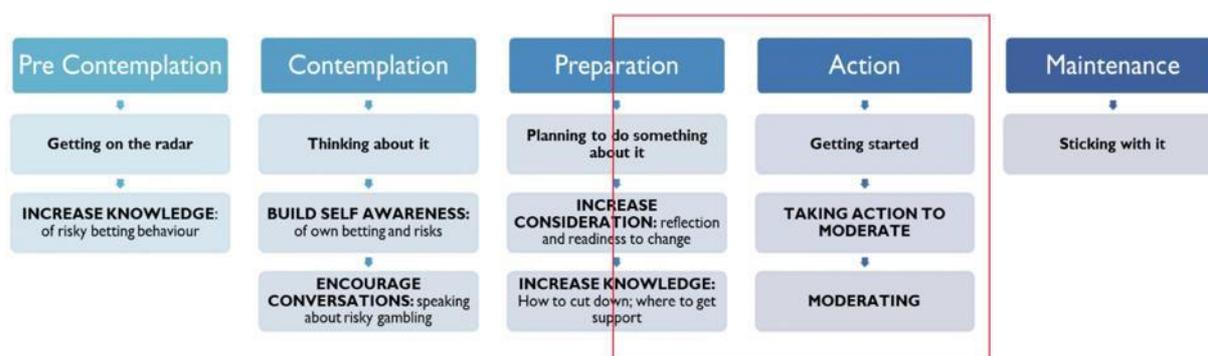
Having created the association between potentially risky betting behaviours and the (unwanted) experience of Bet Regret, the platform was established for the next stage of the campaign, to provide bettors with techniques to help them avoid it.

CHAPTER 5: CAMPAIGN DEVELOPMENT STAGE 2, LEADING TO ‘TAP OUT’ – SEPT. 2019 TO AUG. 2020

Stage 2 focus

In line with the Bet Regret Logic Model the focus now shifts from the broad recognition of risky behaviours, self-awareness and self-reflection to actively helping frequent bettors moderate their behaviours.

The Stage 2 objective is: to increase the numbers of risky sports bettors taking steps to cut down their gambling, both generally and by deploying specific moderation techniques and aids. This necessary narrows the focus to more frequent, more at risk bettors – which have designated as the Behaviour Change audience.



Success is: fewer impulsive bets, fewer bet regret moments for our audience

The desired behaviour change was from ‘Not thinking it through’ to ‘Pause and reconsider’.

The earlier shift in the end line from ‘You’ll Bet Regret It’ to ‘*Think Twice* or You’ll Bet Regret It’ was a move in this direction, but it was clear that a more powerful behavioural intervention or ‘nudge’ would be required. This was particularly important as research had shown that no one moderation technique was top of mind – bettors were lacking a ‘go to’ moderation tool, that was ‘sticky’ and easy.

From September 2019 – strategy and campaign development

The key steps were as follows:

- A workshop helped generate a long list of potential behavioural interventions or ‘nudges’, which was then refined to a shortlist of three, working with behavioural scientists and academic experts in the area (this was undertaken while Stage 1 was still running)
- The top four were trialled in use by frequent bettors to test usefulness and impact (Ipsos MORI, Nov.2019)
- Creative routes (initially three – based on the winning nudge) developed, tested and refined in consumer research (The Outsiders – January 2020)
- Production and launch put back from Spring until Sept. 2020 due to coronavirus impacts
- Additional focus groups to check out refined scripts (June 2020), and initial film edits after production (August 2020), both with The Outsiders Research agency.

Developing candidate behavioural interventions or ‘nudges’

We embarked on a process to identify all of the potential options, looking broadly across all public health areas as well as existing gambling utilities – ending with a workshop to align on a longlist.

We applied the EAST behaviour change framework in the generation and screening of ideas:

- Make it Easy
- Make it Attractive
- Make it Social
- Make it Timely

We defined the task as:

- 1) Adding friction to a frictionless process (create a pause in the process of placing a bet)
- 2) Helping people avoid Bet Regret
- 3) In a way that everyone can do (not dependent, for instance, on downloading an app)

There had been many discussions about providing bettors with an app, but it became clear that – however useful the app was in principle – it would be difficult to get large numbers to download and use an app in practice. Experience suggested that the most effective intervention in practice would be a ‘mental aid’, available to everyone:



The process included Behavioural Science specialist, Richard Chataway to narrow the techniques and explore the evidence base – with valuable input from Professor Marcantonio Spada to further narrow down to a shortlist of three:

- ‘Take a quick look at yourself’
- ‘Say the bet’
- ‘Tap out of your app’

If adopted, from a behavioural science perspective these would all work in principle, the question was would they engage bettors, be adopted and used in practice?

Three concepts were developed for bettor trials, to which we added Setting Limits as an existing moderation tool.

The four concepts

<p style="text-align: center;">CLOSE YOUR APP BEFORE YOU DECIDE</p> <p>You know those bets you regret the minute you make them? You kick yourself for getting caught up in the moment and rushing into making them without really thinking about it.</p> <p>So here's a tip that many people find useful – whenever you are about to place a bet, try to take a few seconds to close your betting app before deciding whether or not to open it again and press that 'Bet Now' button</p> <p>Do you still want to place the bet?</p>	<p style="text-align: center;">SAY THE BET BEFORE YOU DECIDE</p> <p>It's easy to rush into making bets that you regret the moment you place them.</p> <p>Here's a tip that many people find useful – pause for a moment to check your bet by saying it to yourself before you place it, you can help avoid making the kind of impulsive bets that you kick yourself for after.</p> <p>So whenever you are about to make a bet, try to take a moment to say the bet out loud to yourself before you finally decide whether to make it or not.</p> <p>Does it still sound like a bet you want to make?</p>
<p style="text-align: center;">TAKE A QUICK LOOK AT YOURSELF</p> <p>You know those bets you regret the minute you make them? You kick yourself for getting caught up in the moment and rushing into making them without really thinking about it.</p> <p>Here's a tip that many people find useful – taking a quick break to look at yourself before placing a bet, can help you avoid making those kind of bets.</p> <p>So try to take a few seconds to take a quick look at yourself before you decide whether or not place a bet. For example, look at your reflection in your blacked out phone screen, or in a nearby window.</p> <p>Does it still look like a bet you want to make?</p>	<p style="text-align: center;">SET LIMITS</p> <p>It's easy to lose track of your betting and bet more than you intend, and regret it after the event.</p> <p>Here's a tip that many people find useful - you can set limits on how much money and time you want to spend on every betting app and website. Think of it like a safety net, it doesn't stop you betting but it stops you betting more than you intend.</p> <p>So take a couple of minutes to set your limits on your betting apps – and then relax in the confidence that you won't be one of those people who spend more than you intend.</p>

Consumer trials of the four tips were undertaken by Ipsos MORI with a sample drawn from our Behaviour Change audience: male online sports bettors aged 16-44, who bet at least two times a week on average. Additionally respondents expressed an interest in cutting down their betting in the future (c. half of this group). A total of 73 agreed to participate in the trial.

Respondents were asked to rate their interest in the four tips, and then trial use of their preferred tip over a period of c.12 days (including two weekends). They kept a progress journal (being encouraged to make feedback videos on their phone), were asked some questions midway, with a final feedback survey at the end, supplemented by telephone depth interviews.

The key conclusions of the research were:

- All tips were successful; they all had a positive impact users' betting behaviour and no one found them difficult to do or remember.
- Close the App is the most appealing to participants when given an initial choice; on first viewing its imagined to have the biggest impact on betting behaviour, and to be the easiest to incorporate in to betting routine. Not everyone believed they would actually use Say the Bet and Take a Look or that it would have an impact.
- Close the App also has the benefit of not being restricted by situation – easily actioned when both in public / amongst friends and when alone, unlike Say the bet and Take a look which were not seen to be appropriate in all situations (e.g. social betting).
- The tips work through pause and reflect process. Close the app did well at creating a moment to pause, but Say the Bet and Take a Look, if used, were strong at creating a moment to reflect.

Bettors' response demonstrated the potential of Close the App as a mental aid to help cut down on impulsive bets:

What people said:

Liverpool were winning 2-0. I was going to bet £50 on Liverpool to score the 3rd goal. Shut the app for a few moments for time to think straight. Opened up the app, still placed the bet, but only bet £20. Still a loss, but not as much.

"I'd built up a 5 match accumulator and closed the app for one minute before returning. I still placed the bet, but at a reduced stake than I would have done"

Yeah headed for another sports bet today as at a loose end. Closed app and went and made a brew with a biccys and ended up putting the telly on and not bothering with the bet. Not bad eh."

"Has made me forget to go back and do it later and then realised I'd have lost anyway at a later time!"

Creative development – from December 2019

The communications brief was to popularise the Close the App and make it memorable. The brief for creative development summarised as follows in M&C Saatchi's three Box format:



Three creative routes were developed, and tested amongst our Behaviour Change audience in focus groups conducted by The Outsiders (January 2020). One route – Tap Out – emerged as the clear winner in terms of potential high levels of target audience impact, engagement and communication of the tap out mental aid in a motivating way.

The idea in a nutshell – the Kings of Tapping Out

We all regret bets that we don't think through. So, to avoid Bet Regret, we're going to encourage bettors to think more by tapping out of their betting app before placing a bet.

Who better to deliver this simple message, than those who make a living getting others to 'tap out'. We use wrestlers and their trash talk to tell the nation to tap out.



Research conclusions (The Outsiders – January 2020)

Response to this route was very positive, in absolute terms as well as relative to the other routes researched:

- High impact and differentiation
- Judged by respondents to be memorable
- Tonally engaging, interesting and different, high in social currency
- Seen as very relevant, 'for people like me', respondents could identify with the bettor and betting scenarios
- Most understand that it is asking them to 'take a break'
- Some people have adopted the behaviour since seeing the campaign (from follow-up interviews)

A watch out was that some could see 'It's Tap Out Time' (the main line researched) as asking them to 'give up betting' altogether, which can lead to rejection of the message. In this context the alternative line of 'Tap Out for Time Out' worked better, being more explicit in terms of a 'take a break', moderation message.

A second watch out related to the need to link tapping out more strongly to the avoidance of

Bet Regret (which is the link/bridge to the last campaign) – via the overall campaign line.
Coronavirus delays and creative refinements (Feb – August 2020)

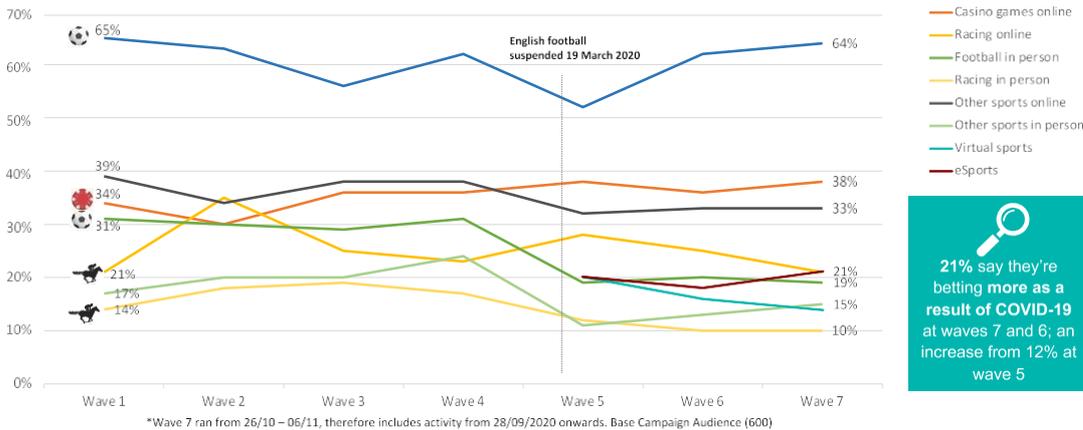
With some refinements, Stage 2 of the campaign was ready to go – but the pandemic had dual impacts on the planned timetable for an April launch of Tap Out:

- Production was ready to proceed in March, but had to be pulled at the last minute due to lockdown and related impacts on travel and social distancing making film production impossible in the short-term, including the possibilities of using well-known WWF wrestlers from the USA (the basis for the scripts as originally researched)
- The closing down of live sport greatly reduced sports betting for a period – activity was obviously timed in line with the football season

Ipsos MORI tracking showed an understandable decline in sports betting during lockdown, but has returned to usual levels by August; overall levels of gambling have remained broadly static:

It has been a volatile year for betting patterns, but betting activities have returned to “normal” trajectory

Q1. Which of these have you spent any money on in the past 4 weeks?* (Campaign Audience)



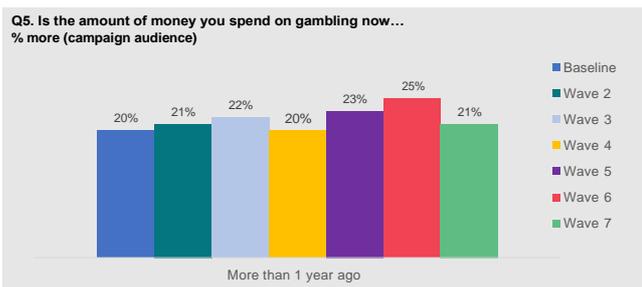
21% say they're betting more as a result of COVID-19 at waves 7 and 6; an increase from 12% at wave 5

Base size: Campaign Audience (600) Source: Ipsos MORI online survey

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Despite brief disturbance following COVID-19, spending and frequency has remained broadly static over the longer term



Q2. In a typical week, on how many days would you say you gamble?
 Mean average (campaign audience)

3
 days per week
 Mean ranged from 3.15-3.29 across all 7 waves

Changes seen among audiences (since baseline)

C Audience	21% (+1)
B. Change	24% (-4)
Wider	16% (+4)

Base sizes: Campaign Audience (600), (Behaviour Change Audience (386), Wider Gambling (502) Non-Gambler Audience (499)

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Source: Ipsos MORI online survey



With a government commitment to allowing live sport from July, the campaign was re-planned for a September launch in line with the start of the new football season. However, the continuing pandemic necessitated a move to locally-available talent for the featured wrestler.

Further focus groups conducted by the Outsiders in June 2020 checked out the impact of this change, and also the suitability of the scenarios in a coronavirus context likely to persist for some time. This provided the necessary reassurance to proceed with production:

- Having scenarios that did not match the current reality of COVID-19 was not a problem
- Alternative scenarios were looked at (e.g. canteen, supermarket), but Pub and Garden settings resonated strongest in terms of betting behaviour
- Impact and memorability was still high without well-known WWF wrestlers, although their absence might reduce social currency/ talkability
- Clear casting guidelines for alternative talent

A final stage of focus groups (The Outsiders – August 2020) was undertaken to check out the final films, and optimise edits if necessary, post production. Response to the two main films (30 and 20 second versions) – and posters – was very positive in terms of appeal, relevance, clarity of communication and motivation (particularly important as there is a risk that people’s inclinations to moderate may have been dampened by an enforced break due to lockdown:

“It reminds me of when Kurt Angle had a fight with Hulk Hogan, he made him tap out and I remember laughing at that. I liked it.” (High risk)

“I kind of relate to it because I grew up watching this stuff, so it’s kind of cool.” (High risk)

“It sends a perfect message, it relates to me and it makes me think.” (Medium risk)

“It’s relatable as well, you’d have done it yourself in multiple situations that align with what the advert is trying to get across. It definitely makes you think about certain situations that you’ve been in and how you can prevent yourself from doing that again.”(High risk)

“Down to earth, because I kind of almost picture that phrase with a group of lads in the pub sort of thing.” (High Risk)

“Definitely think it’s relatable, obviously the context in the pub and that, and I think that you are having a pint with your mates it’s a scene that can maybe be re-acted - you’re sitting with your mate and you’re saying, for example, ‘Tap Out you’ve bet too much’.” (BAME, Medium risk)

“If you’re standing in the pub with your mate and you’re betting on something and you could say, ‘Remember that advert?’, ‘Alright, fair enough, I won’t put the stupid bet on’, I definitely think it could have a positive impact. (High risk)

“The moral of the story was to tap out, don’t chase your bets. Bet or Regret is the sinking feeling you get when you make a bet without thinking, when you’re drunk, bored or chasing your losses, that’s the whole subject around it - think before you bet.” (BAME, Medium risk)

“Remember Tap Out and time out.” (Medium risk)

Communication was less clear for the 6 second edits for online, and radio, and refinements were subsequently made.

Broader coronavirus impacts

Over and above the necessary delays, coronavirus has had a number of knock-on effects which have put a greater focus on sports betting in the second half of 2020 following the return to live sport in July 2020.

With live spectators still more or less excluded, there has been an explosion of live football coverage on TV, which created more opportunities to bet (more people watching from home, where betting is most common) and overall interest.

Gambling Commission data shows sharp increases in September and October in the number of active online betting accounts, and overall gambling yield (related to spend), especially relating to 'real event betting'.

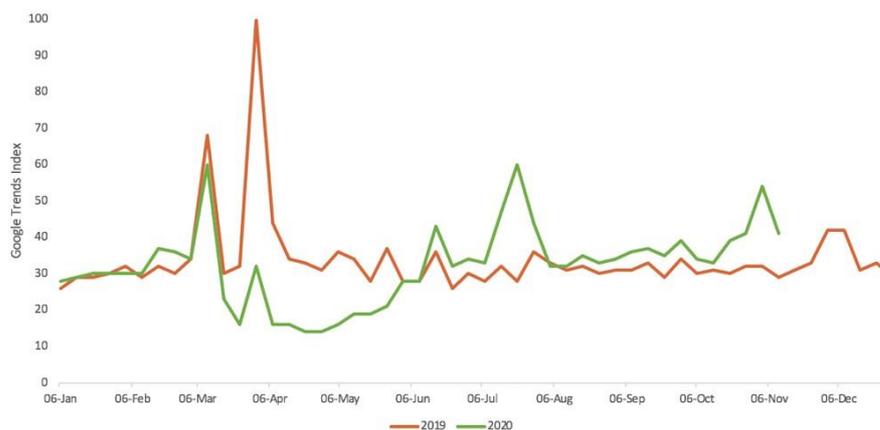
Gambling operator advertising spend has returned to high levels following a dip during lockdown, and Google Trend data is now showing year on year increases in betting interest.

All 28 Premier League games in September to be shown on live TV

- Sky Sports, BT Sport, BBC and Amazon Prime to show games
- Decision taken by clubs with no fans allowed into stadiums



Betting interest has been higher post Lockdown than in 2019



Source: Google Trends – “sports betting” topic, 2019 vs 2020

So the campaign is currently operating in an environment where the overall impetus to bet – driven by high availability of sport or TV and online, plus low availability of alternative activities due to continuing coronavirus restrictions – is atypically high, and likely to continue to be so until at least Spring 2021.

Chapter 5 – Learnings

The key learning here is essentially that the process learnings from Chapters 2 and 3 (from the development of Stage 1 of the campaign) are very valuable, with the development process for Stage 2 (the impacts of COVID excepted) running smoothly:

- Following a stepwise process, and started early enough to allow realistic timings to execute that
- Allowing sufficient time to fully engage subject matter experts
- Working with the communications agency, providing time to develop and test multiple hypotheses relating to effective interventions and messages, and then refine in an iterative way with subject matter experts and with our target audience in a multi-stage programme of consumer research
- It was particularly important in this case to get bettors to trial the prototype mental aids developed in use, in addition to just seeing how they responded to them as an idea, to get closer to their real life utility and likely effectiveness
- There were regular ‘check ins’ on progress between the Campaign Director and Chair of the Board, between quarterly Board meetings

CHAPTER 6: STAGE 2 CAMPAIGN IMPLEMENTATION AND INITIAL IMPACTS – FROM SEPT. 2020, ONGOING

Stage 2 ‘Tap Out for Time Out’ in summary

- The first burst of advertising, spearheaded by two TV executions, ran in September and October 2020, with a second burst planned next year
- The films ran in 30 and 20 second versions, with 6 second edits for digital use
- The films also ran online, alongside other programmatic and social media activity, plus Radio (TalkSport)
- We again worked with LADBible, building on the successful media partnership in Stage I
- The total media spend for this first burst was c.£1.7 million – of which c.£0.9 million was donated as media space, but planned to meet the same media targeting needs as paid for media (donated media from Sky, BT Sport, ITV)
- The budget split was: TV 49%; Online video 6%; LadBible 13%; Radio 6%; Programmatic digital and social media 26%

Media planning followed a similar approach to Stage I, focused on maximising exposure amongst the hard to reach audience of males aged 16-34, mainly around live sport and other sporting context and content, where sports betting would be front of mind.

Media Laydown – Stage 2 – Tap Out for Time Out to Avoid Bet Regret

		PHASE 2 -2020																
		September				October				November				December				
		7	14	21	28	5	12	19	26	2	9	16	23	30	7	14	21	28
TV	£ 815,000.00	37% @ 3.5																
BVoD	£ 108,000.00	17% @ 3																
OOH	£ -																	
Radio	£ 99,996.00	18% @ 11																
Partnership	£ 214,461.68	57% @ 4																
Digital	£ 442,340.00																	
Spends	£ 1,679,797.68																	

It should be noted that the coronavirus outbreak has caused considerable turbulence in the TV market in terms of both supply (audience availability) and demand (price). The result is that the campaign under-delivered significantly on the planned weight – achieving only 26% reach, versus the 37% planned. (Some unused TV budget will be replanned into the next burst).

This was in part mitigated by over-performance in other parts of the plan, with LADBible, YouTube and radio all delivering more impacts than planned. The net result is overall campaign weight broadly similar to the two main Stage I Bet Regret bursts of activity.

A similar weight and mix of activity is planned for February and March 2021.

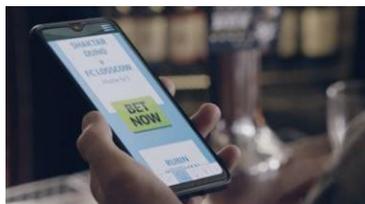
Creative executions



These focused single-mindedly on popularising the Tap Out for Time Out mental aid, using our featured wrestlers to create impact and deliver the message.

Two films led the campaign, running in equal rotation. The first set in a pub, where our wrestler intervenes to encourage a bettor to tap out of an ill-considered bet on Ukrainian football. The second is set in a garden, where a bettor is chasing his losses.

Pub:



Wrestler: It's tap out time... Tap Out of the app, Dave!.....Do you even know anything about Ukrainian football?

Dave: No... No... I've tapped out! I've tapped out!

Wrestler: Think before you bet.... Tap out for some time out and avoid Bet Regret

Garden:



Wrestler: It's tap out time.... Tap Out of the app, Barry! You chasing losses again? That dog's got more chance of catching its tail....

Barry: I've done it, I've tapped out!

Wrestler: Think before you bet.... Tap out for some time out and avoid Bet Regret

Digital and social media:





David James 'testimonials' for social media

A testimonial featuring David James explaining how to Tap Out for time out was introduced at a low weight at the end of the burst but will be used more extensively going forwards.



“Hi, it’s me David James, and I’m here to help you avoid Bet Regret. Before you commit to a bet, hold your finger out and swipe out of the betting app.”

Pause for as long as you need..... It might be for a few seconds, it might be long enough to make a cuppa.
So remember, always tap out for time out, and avoid Bet Regret.

Campaign Impacts

At the time of writing, campaign tracking research results on the first burst of Tap Out activity have just become available.

Although only a few weeks into the campaign, they show that it cut through strongly, especially amongst the core target for this Stage, more frequent bettors, at the riskier end of the behaviour spectrum, already expressing some interest in moderating their betting.

Within the broader Campaign Audience of (monthly plus) male sports bettors aged 16-44; at Wave 7 (similar to other waves):

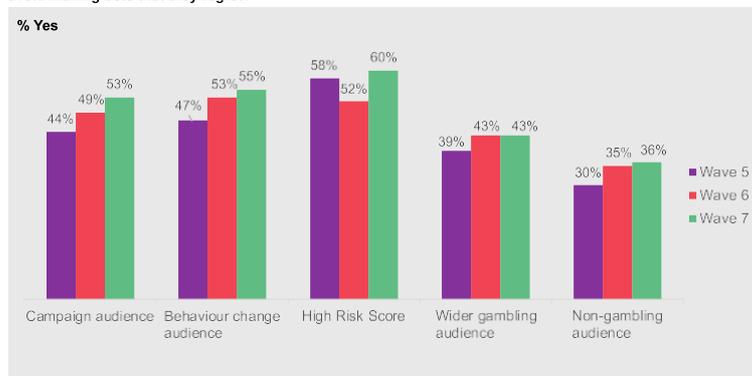
- 70% bet twice a week or more often (moderation techniques clearly tend to be less relevant to less frequent bettors)
- 56% say that they are cutting down or intend to do so in the future (others less likely to engage with techniques such as Tap Out)
- 49% exhibit some level of risk in their behaviours *and also* considering cutting down, now or in the future (those most likely to find an aid useful)

Headline findings from the latest research dip (fieldwork 26 Oct. – 6 November 2020) are:

- Positive uplift in both prompted and unprompted recognition, matching awareness levels from Stage 1 Bet Regret activity
- The campaign continues to be very well targeted at key groups of interest
- Seen as *entertaining* and *engaging*, and is most *relevant* to those who are taking or thinking about taking action to reduce their betting
- Campaign delivers Tap Out as key outtake; this builds on rather than replaces wider calls to Think Twice and avoid Bet Regret; delivering broader 'pause' messages alongside the specific Tap Out mental aid
- The campaign is seen as highly 'talkable' and there are opportunities to capitalise on this
- Early days but indications that this is yet translated into Tap Out behaviour

Unprompted awareness (of messages that encourages people to avoid making bets they'll regret) has steadily increased since first tested at wave 5

Q14A. Have you seen or heard any advertising recently encouraging people to think about their gambling and avoid making bets that they regret?



- A similar proportion of **app users (55%)** were aware of advertising
- In unprompted recall, respondents did cite tap out, bet regret, wrestler.
- 47% of those who said they had not seen or heard anything on bets they will regret later said they recognised the campaign

Base sizes: Campaign Audience (600), (Behaviour Change Audience (386), High Risk (224) Wider Gambling (502) Non-Gambler Audience (499)

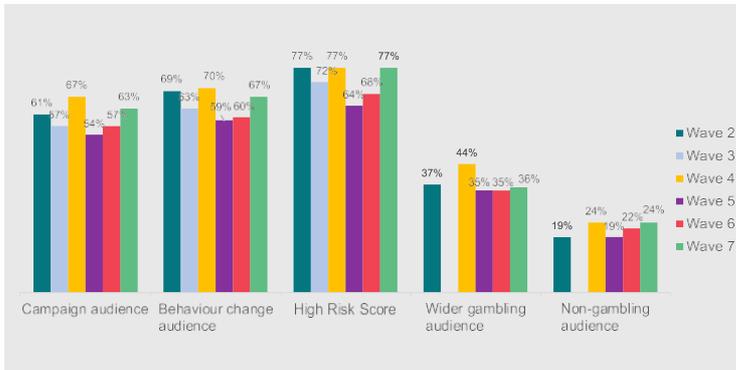
Source: Ipsos MORI online survey

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Campaign recognition* is strong, and continues to be well targeted (reflecting wave 2 first Bet Regret post survey)

Campaign recognition by audience - % recogniser



- Impact of campaign (difference between wave 6 and 7) most apparent in key target audiences – less so among wider gambling audience
- 66%** of those who **bet using an app** recognised the campaign. Recognition of all materials is higher amongst this group
- Tap out only materials scored 53% recognition** amongst the campaign audience

*Comparisons between waves should be treated with caution, as ad prompts necessarily changed to reflect the change in executions of the campaign.

Base sizes: Campaign Audience (600), (Behaviour Change Audience (386), High Risk (224) Wider Gambling (502) Non-Gambler Audience (499)

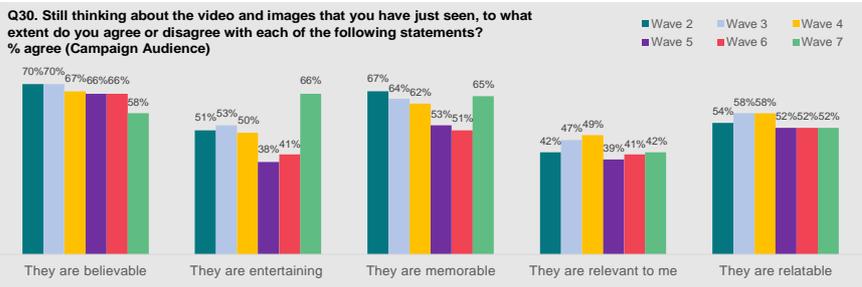
Source: Ipsos MORI online survey



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Campaign engagement is strong, with the greatest gains in being entertaining and memorable

Q30. Still thinking about the video and images that you have just seen, to what extent do you agree or disagree with each of the following statements? % agree (Campaign Audience)



Those who **bet using an app** are **more engaged** than the total across all measures:

- 46% felt the ads were **relevant** to them;
- 64% thought they were **believable**;
- and 57% scored the ads as **relatable**.

Changes seen among audiences (since post wave 2)

C Audience	58% (0)	66% (+15)	65% (-2)	42% (-0)	52% (-2)
B. Change	60% (-3)	65% (+7)	65% (-5)	48% (-3)	54% (-5)
Wider	56% (-3)	57% (+19)	61% (+6)	21% (-3)	42% (-2)
Non	42% (+2)	47% (+19)	59% (+8)	6% (+2)	25% (-8)

Base sizes: Campaign Audience (600), (Behaviour Change Audience (386), Wider Gambling (502) Non-Gambler Audience (499)

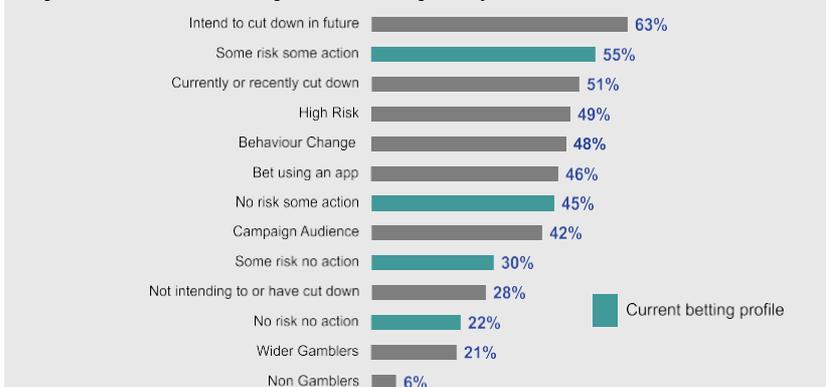
Source: Ipsos MORI online survey



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Relevance of the campaign highest among those currently or planning to take action to cut down

Q30. Still thinking about the video and images that you have just seen, to what extent do you agree or disagree with each of the following statements? % agree they are **relevant to me**



The campaign resonates most strongly with who are most likely to benefit from a call to action – i.e. those currently or intending to cut down

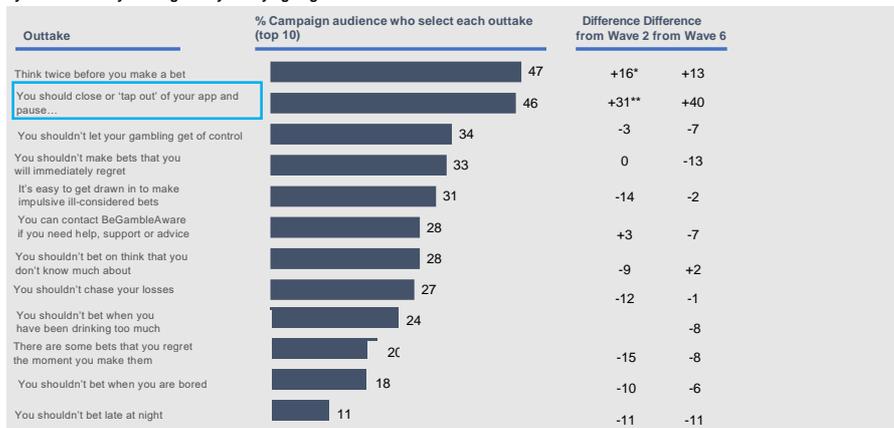
Resonates less strongly with those who are still taking risks but who aren't contemplating taking action

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Think Twice and Tap Out the seen as the strongest outtakes from the campaign

Q29. Still thinking about the video and images you have just seen, which of the following, if any, do you think the key messages they are trying to get across are?



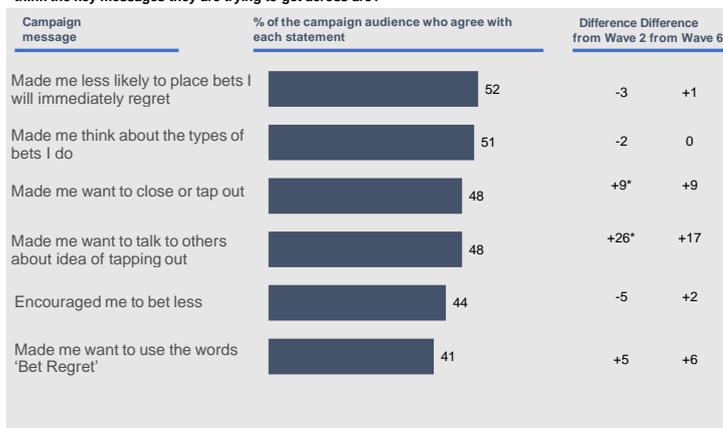
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Base sizes: Campaign Audience (600)



More likely to want to talk about than enact Tap Out, but positive shifts on both measures

Q30 Thinking about the video and images you have just seen, which of the following, if any, do you think the key messages they are trying to get across are?



*Only asked from Wave 5

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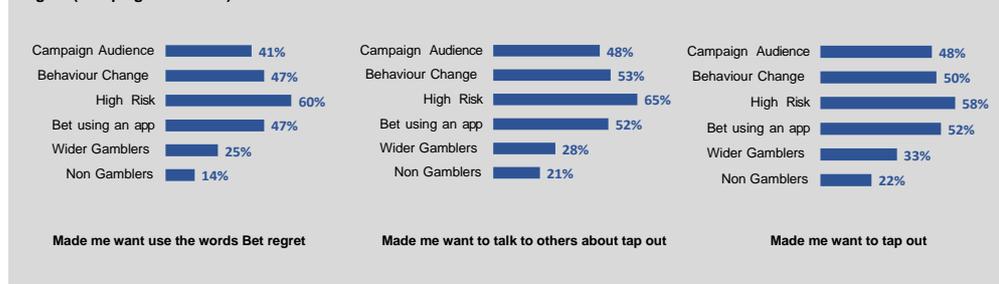
Base sizes: Campaign Audience (600)



The campaign had a positive impact communicating messages to peers, and sentiment to taking up tap out behaviour amongst target groups

Q30. Still thinking about the video and images that you have just seen, to what extent do you agree or disagree with each of the following statements?

% agree (Campaign Audience)



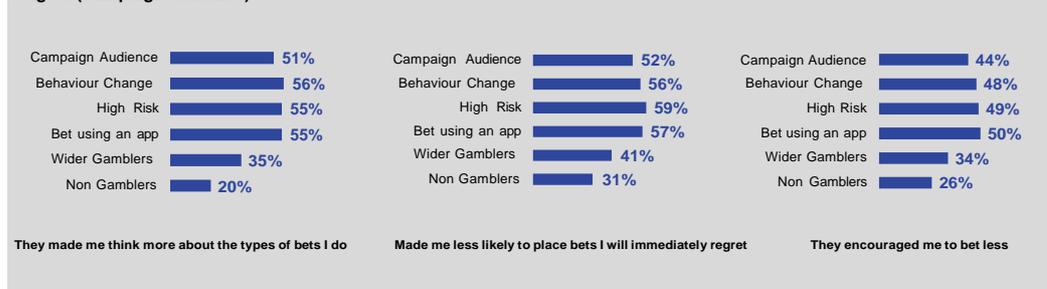
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The campaign also had a positive impact on behavioural engagement metrics, particularly amongst target audiences

Q30. Still thinking about the video and images that you have just seen, to what extent do you agree or disagree with each of the following statements?

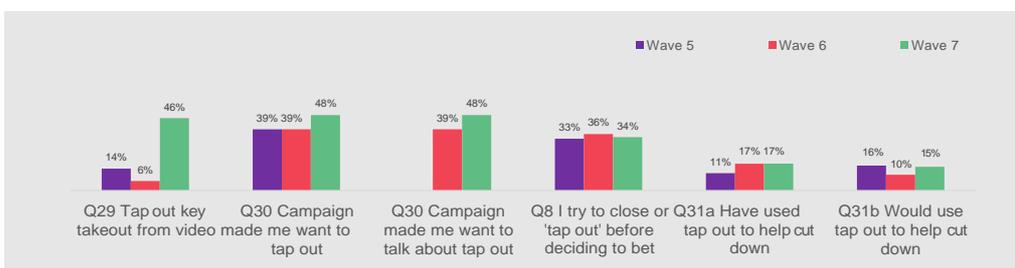
% agree (Campaign Audience)



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Tap Out resonates strongly on seeing campaign, but less movement so far on executing behaviour



Changes seen among audiences (since pre Tap Out wave 6)

Campaign Audience	46% (+40)	48% (+9)	48% (+9)	34% (-2)	17% (0)	15% (+5)
Behaviour change	39% (+33)	50% (+5)	53% (+5)	39% (-4)	20 (+1)	13% (0)

Base sizes: Campaign Audience (600), Behaviour Change Audience (380)
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Source: Ipsos MORI online survey

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The Tap Out (and broader pause) message is clearly getting through, especially to those to whom it is most relevant. Tapping out (and/or pausing) is also clearly seen as a relevant behaviour to many (confirming research in the development phase), and also very 'talkable'.

It's only a few weeks in, but the challenge is to embed Tapping Out in bettor's routines as a regular, default behaviour.

Some refinements are planned for the next stage of activity in Feb/ March 2021, including:

- Editing existing Wrestler copy to emphasise Tapping Out as a regular behaviour
- Increased use of testimonial-type copy online, such as the David James films and similar
- Increased social media activity to capitalise on Tap Out's peer-to-peer talkability potential
- Recontacting research participants aware of 'Tap Out' but not using the tip to check out refinements, and better understand the gap between awareness and action

Chapter 6 – Learnings

The Tap Out message has cut through and been clearly received, especially by those for whom it is most relevant behaviourally as an aid to moderate and prevent harms – whether via literally tapping out or simply prompting people to pause and reflect before making a bet.

It is highly talkable and has the potential to complement 'Bet Regret' by becoming a meme and useful mental aid amongst bettors.

What is not clear at this point – a few weeks in – is whether it can be successfully embedded in bettor's routines as a regular, default behaviour.

This is clearly the challenge, and focus for the refinement for communications for the next wave of activity in February/ March 2021 (guided by further analysis and diagnostic research).

In encouraging more considered, less impulsive betting behaviours any campaign pits itself against considerable pressures in the other direction across broadcast and social media, 'push' messages in app, often focused on immediate, in play betting opportunities, and increasingly slick, frictionless betting interfaces.

Effective prevention of gambling harms requires a coherent and co-ordinated whole systems approach involving partnerships with other organisations to inform and educate, as well as consideration of regulatory interventions and product safety and design requirements.

A legitimate question is how much any communications campaign can achieve in isolation. It is clear that the Bet Regret campaign is only one part of a broader public health dynamic, preparing the ground for behaviour change amongst those who gamble and across the whole gambling ecosystem. This includes safer gambling commitments made by operators themselves (in terms of safer gambling communication and tools), and almost certain regulatory action.

The Board is encouraged by the announcement on 8 December 2020 of a Review of the Gambling Act 2005, with wide terms of reference, including a call for evidence on gambling advertising and sponsorship arrangements across sports and other areas.