

Background to World Cup prevention campaign



Background research and data report

1. Introduction

In advance of the World Cup, GA has developed a bespoke Bet Regret campaign to encourage younger, male sports bettors to enjoy the World Cup without experiencing bet regret. This briefing note sets out the extensive research programme which has informed the development of the campaign:

- A detailed narrative review published in December 2020 (avoiding bet regret, by GambleAware), outlining the campaign development process and strategy behind Bet Regret, tailored towards the audience of young males who bet regularly¹
- A more technical and data-driven report published in June 2021 (the use of research in the Bet Regret campaign, by Ipsos), outlining the research that went into Bet Regret, and the performance of the campaign to date²
- An internal desk research piece in May 2022 looking at the World Cup moment (by GambleAware), to ensure this was an appropriate time for GambleAware to be raising awareness of gambling harms
- Several stages of internal strategic and creative development research conducted in August and September 2022 (by Define research), to ensure that the communications developed resonated strongly with men and women who bet, and was tonally appropriate for the World Cup moment
- Polling research among 2000 football fans published in November 2022 (Football fans gambling harms prevention campaign, by Opinium) to shed light on expected betting behaviours during the World Cup to accompany the release of the campaign³
- Engagement with those with lived experience of gambling harms, key partners (e.g., Football Supporters Association), and stakeholders in the gambling harms community throughout the process

This synopsis summarises the key findings and insights that informed the development of the campaign, alongside outlining the rationale for the campaign.

2. Football betting is common and profitable in Great Britain

Latest estimates, provided by the Gambling Commission, suggest that 44.1% of those in Great Britain had participated in any gambling activity over the last four weeks⁴. An estimated 4.3% have placed a bet on football over the last four week, which is the highest volume gambling activity outside of lottery and equates to around 2.2m people⁵. If we look at a slightly longer period (12 months), estimates by YouGov suggest that 9.0% of those in Great Britain have participated in football betting⁶, equating to around 4.6m people⁷. On top of this, research from Opinium has shown that 27% of football fans who have not bet on football in the last 12 months are likely to bet on the World Cup, demonstrating the likely surge in betting this World Cup. Aligned

¹ See AVOIDING BET REGRET An overview of the campaign to date <https://www.begambleaware.org/sites/default/files/2021-07/THESTORYOFBETREGRETfinal.pdf>

² See The use of research in the Bet Regret campaign Synthesis Report https://www.begambleaware.org/sites/default/files/2021-08/20-001116-01%20Safer%20Gambling%20Synthesis%20report%20FINAL%20v5%20ICUO_090721_clean_0.pdf

³ See <https://www.opinium.com/gambleaware/> for more information.

⁴ See Statistics on participation and problem gambling for the year to Sept 2022 <https://www.gamblingcommission.gov.uk/statistics-and-research/publication/statistics-on-participation-and-problem-gambling-for-the-year-to-sept-2022>

⁵ Based on a population of 52,853,971 individuals in Great Britain aged 16+

See Estimates of the population for the UK, England and Wales, Scotland and Northern Ireland

<https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/datasets/populationestimatesforukenglandandwalesscotlandandnorthernireland>

⁶ Figures from internal analysis of the Annual GB Treatment and Support Survey 2021

<https://www.begambleaware.org/sites/default/files/2022-03/Annual%20GB%20Treatment%20and%20Support%20Survey%20Report%202021%20%28FINAL%29.pdf>

⁷ Based on a population of 51,435,642 individuals in Great Britain aged 18+

See Estimates of the population for the UK, England and Wales, Scotland and Northern Ireland (link in source above)

with this, the Gross Gambling Yield (GGY) made from online betting has quadrupled over the past ten years (£0.6 billion to £2.6 billion)⁸.

3. The World Cup moment could drive gambling harms among some groups

Research among football fans by Opinium⁹ showed that more than half of fans (56%) agreed that it is easy to lose more money than expected during the World Cup. Almost three in ten feel like they can't enjoy the World Cup without placing a bet (28%) with the same proportion feeling anxious thinking about how much they might lose betting on the World Cup).

Over two in five football fans (43%) are likely to place a bet on football during the World Cup, among those that are likely to do this:

- Half (50%) expect to bet more than usual on football during the World Cup
- Special odds deals (53%), in play offers (48%) and getting carried away in the moment (45%) are cited as most likely to encourage them to spend more money betting than they intended to

Almost three in ten (29%) football fans have placed a bet on football in the last year, among those that do a large portion report feeling:

- Regretful about bets they've placed after placing them (69%, i.e. Bet Regret)
- Stressed, anxious or worried about money they've lost betting (62%)
- Guilty or ashamed about how betting makes them feel (57%)
- That they wanted support to help stay in control of betting (51%)
- That they wanted to stop betting but couldn't (51%)
- That they may have a problem with gambling (42%)

4. The World Cup attracts a demographic known to be at higher risk of gambling harms

The core age group that the campaign is looking to target is younger men aged 18-44 as they are generally at higher risk of harm. YouGov's Annual GB Treatment and Support survey data suggests that just under one in five men in Great Britain aged 18-44 have placed a bet on football in the last 12 months.¹⁰ Various surveys, including the Treatment and Support Survey¹¹, the Gambling Commission's prevalence survey¹² and the Health Surveys¹³, show that this demographic is generally more likely to experience problems with gambling compared to the general population.

However, it is not exclusively younger men that experience gambling harms. It is important to note that anyone can experience gambling harms, both as a result of their own gambling, and by being negatively

⁸ See Industry Statistics – July 2022 Revision <https://www.gamblingcommission.gov.uk/statistics-and-research/publication/industry-statistics-july-2022-revision>

⁹ See <https://www.opinium.com/gambleaware/> for more information.

¹⁰ <https://www.begambleaware.org/sites/default/files/2022-03/Annual%20GB%20Treatment%20and%20Support%20Survey%20Report%202021%20%28FINAL%29.pdf>

¹¹ <https://www.begambleaware.org/sites/default/files/2022-03/Annual%20GB%20Treatment%20and%20Support%20Survey%20Report%202021%20%28FINAL%29.pdf>

¹² <https://www.gamblingcommission.gov.uk/statistics-and-research/publication/statistics-on-participation-and-problem-gambling-for-the-year-to-sept-2022>

¹³ <https://digital.nhs.uk/data-and-information/publications/statistical/health-survey-for-england/2018/health-survey-for-england-2018-supplementary-analysis-on-gambling>;

<https://assets.ctfassets.net/j16ev64qyf6l/60qlzeoSJIJ2QxByMAGJqz/e3af209d552b08c16566a217ed422e68/Gambling-behaviour-in-Great-Britain-2016.pdf>

affected by others gambling. This is backed up by data from YouGov’s Treatment and Support survey which shows gambling harms affecting those across all ages, genders, regions, socioeconomic factors, ethnicities, sexualities, religions and so on¹⁴.

5. The World Cup moment, coupled with the cost-of-living crisis, could exacerbate gambling harms

Data from Citizen’s Advice dashboard is showing the impact of the cost-of-living crisis. There has been a continual increase in the charity being contacted for support in regards to energy costs and signposting to other charities/food banks¹⁵. The data shows certain groups are more severely impacted by the cost of living compared to others (e.g., referrals to food banks is much more common among those from mixed/multiple ethnic groups and Black/African/Caribbean/Black British). These groups are also significantly more likely to experience problems with gambling¹⁶.

Opinium’s research with football fans¹⁷ has also shown the link between gambling harms and the cost of living. One in 10 football fans (10%) say they their gambling losses have previously left them unable to cover living costs, while 9% say they have been unable to buy Christmas or birthday presents as a result. Going forward, around one in five (21%) football fans that bet on football expecting their gambling to increase in the next 6 months due to the rise in cost of living (a similar finding was shown among women who gamble in previous research¹⁸). An open follow up question was used to ask why this was, with the vast majority citing attempts to make money to help financially. Some verbatim examples can be seen below:

“Because I can’t afford the cost-of-living crisis and will try to win some money”

“Because I need the money so I will be getting more risky bets”

“I’ll need money and deceive myself into thinking gambling will give me that “big win” which never happens”

The data also showed that among those likely to bet on the World Cup, two in five (39%) said that financial pressures are likely to lead them to spend more than they intended to. This mirrors data collected among those contacting the National Gambling Helpline¹⁹. With financial difficulties (32%) the second most cited reason for gambling behind chasing losses/wins (64%). Alongside financial difficulties being a driver of gambling, it was also the second most cited impact from gambling (75%) behind anxiety and stress (79%). GambleAware would emphasise the importance of the message that gambling should not be seen as a financial opportunity, as outlined by GamCare CEO Anna Hemmings:

“Last year almost one-third of people who contacted our Helpline cited financial difficulties as the reason they initially chose to gamble. However, after their experiences of gambling, this figure jumps to three in four people who say they experience financial difficulties now as a result of it. We know that gambling should not

¹⁴ Figures from internal analysis of the Annual GB Treatment and Support Survey 2021

<https://www.begambleaware.org/sites/default/files/2022-03/Annual%20GB%20Treatment%20and%20Support%20Survey%20Report%202021%20%28FINAL%29.pdf>

¹⁵ See Our new cost of living dashboard: the crisis we’re seeing unfold

<https://wearecitizensadvice.org.uk/our-new-cost-of-living-dashboard-the-crisis-were-seeing-unfold-aac74fb98713>

¹⁶ See Annual GB Treatment and Support Survey 2021

<https://www.begambleaware.org/sites/default/files/2022-03/Annual%20GB%20Treatment%20and%20Support%20Survey%20Report%202021%20%28FINAL%29.pdf>

¹⁷ See <https://www.opinium.com/gambleaware/> for more information.

¹⁸ See Women’s Prevention Campaign

<https://www.opinium.com/gamble-aware/>

¹⁹ See TRUSTEES’ ANNUAL REPORT AND FINANCIAL STATEMENTS

<https://d1ygf46rsya1tb.cloudfront.net/prod/uploads/2022/10/Gamcare-Annual-Report-V12-FINAL-HR.pdf>

be seen as a financial opportunity, we are here for anyone struggling with their gambling through the cost-of-living crisis.”²⁰

6. There is large amount of betting and gambling advertising in football

Opinium’s survey of football fans reveals that almost two-thirds (64%) agreed that there are too many gambling advertisements / sponsorships in football in general, with a similar amount (61%) agreeing there are too many gambling ads in the World Cup and other international tournaments. Around a quarter of fans (24%) agreed that gambling advertisements lead them to place bets that they would not otherwise make, while 26% said this was the case for gambling app notifications. This was even higher among those scoring 8+ on the PGSI scale (54% and 55% respectively).²¹

Although there is a lack of recent data on how much the gambling industry spends on advertising, it has previously been estimated at £1.5 billion in 2017.²² It has been estimated that 161 betting adverts were shown on television during the group stages of the 2018 World Cup (around 7 adverts per match) – although this did reduce significantly at EURO 2020.²³ Analysis by The Times showed a high degree of spending on betting during the last World Cup, with £150 million bet on the England v Tunisia group stage game, the equivalent of £11 for every person who watched the match in full. Live “in play” betting was especially popular during the tournament with more than £4,000 wagered per second on average.²⁴

More broadly, research published by GambleAware in 2020 showed that 96% of young people aged between 15 and 24 had seen gambling marketing messages in the last month and were more likely to place a bet as a result, and those scoring 8+ on the PGSI scale were more likely to be influenced by advertising²⁵.

It is important to acknowledge some recent positive steps that have been taken, namely:

- Advertising guidelines (introduced in October 2022) to restrict the amount of advertisements seen by young and vulnerable people²⁶. This includes not allowing gambling companies to use any footballers, sportspeople, or any other celebrities with a considerable following among under-18 on social media
- The voluntary whistle-to-whistle ban (introduced in August 2019), under which TV betting commercials cannot be shown from five minutes before a match kicks off until five minutes after it ends, before the 9pm watershed. A report by Enders Analysis found that this led to a significant reduction in the presence of sports gambling advertising on television between 2018 and 2019 (although it raises some questions about the level of adherence by operators post-Covid).²⁷ However, the report also states that television accounts for quite a low share of total gambling advertising, with a larger and growing share delivered online and therefore not subject to this restriction, and that televised gambling advertising will switch to online in response.

²⁰ See GamCare’s Annual Report 2021-22

<https://www.gamcare.org.uk/news-and-blog/news/gamcares-annual-report-2021-22/>

²¹ See <https://www.opinium.com/gambleaware/> for more information.

²² See Gambling companies spend £1.2 billion marketing online, five times more than on television ads.

<https://www.begambleaware.org/sites/default/files/2020-12/2018-11-24-gambling-marketing-online-five-times-tv-ad-spend.pdf>

²³ See NUMBER OF TV BETTING ADS DURING EUROS FALLS BY ALMOST HALF COMPARED TO LAST WORLD CUP

<https://bettingandgamingcouncil.com/news/number-of-tv-betting-ads-during-euros-falls-by-almost-half-compared-to-last-world-cup>

²⁴ See World Cup kicks off a £2.5bn betting splurge

<https://www.thetimes.co.uk/article/world-cup-kicks-off-a-2-5bn-betting-splurge-ggx8prl5m>

²⁵ See Final Synthesis Report The impact of gambling marketing and advertising on children, young people and vulnerable adults

https://www.begambleaware.org/sites/default/files/2020-12/the-effect-of-gambling-marketing-and-advertising-exec-sum_final.pdf

²⁶ See Tough new rules to curb broad appeal of gambling ads and better protect under-18s

<https://www.asa.org.uk/news/tough-new-rules-to-curb-broad-appeal-of-gambling-ads-and-better-protect-under-18s.html>

²⁷ <https://www.endersanalysis.com/reports/betting-gaming-advertising-inadequate-solution-online-harm>

- The gambling industry's commitment in 2020 that at least 20 per cent of its TV and radio adverts will feature safer gambling messages.²⁸

However, there is still more that can be done. The government has recently conducted a consultation for gambling law reform and is due to publish a white paper on the topic. It is anticipated the white paper will debate further restrictions for gambling advertising in football. This is particularly important due to the potential impact of gambling advertising on young people and those already experiencing harms from gambling.

7. Prevention campaigns need to take into account the unique moment of the World Cup

To help understand the unique context and develop the campaign, a series of qualitative projects were commissioned in line with best practice. The research included 26 depth interviews and 10 focus groups. The core sample was men aged 18-44, who are socioeconomic grade C1C2DE, have a PGSI score of 3+, and frequently bet on football. However, as many of the ads will be seen by a broader audience through broadcast channels, interviews were also conducted with those with a PGSI score of 1-2, women who bet on football, and those negatively affected by others gambling to understand the wider impact.

The key insights that helped shape the campaign are below:

- Many expect to bet more in the World Cup than in general, and believe this is legitimate as the tournament is infrequent and contained. Gambling is seen as an integral part of the fun / positive atmosphere for this audience, which means focusing on harms more strongly in advertising lands badly (i.e., as a nagging voice that doesn't relate and is out to spoil the fun)
- In general there is a willingness to hear helpful and supporting messaging from GambleAware to help avoid Bet Regret during the World Cup, but importantly the tone should be aligned to the audience's more positive mood at this time
- Football cues are important to enhance trust and demonstrate campaign relevance, with football talent and managers most impactful
- Key motivators to bet include rational triggers (e.g. betting offers, good odds, tips from friends, and own knowledge of teams) alongside emotional triggers (e.g., fear of missing out, boredom, excitement, impulsivity and over-confidence)
- In-play betting and chasing losses are seen as behaviours where those that bet are most likely to get carried away and end up spending more than planned
- Those negatively affected by someone else's gambling were particularly concerned about this period. Normalisation of World Cup fun and a more laissez-faire attitude to betting, socialising and drinking can make it more difficult to communicate about a problem with a loved one (e.g. seen as a 'kill joy')

Alongside this primary research with the target audience, we conducted numerous rounds of engagement with key stakeholders (e.g. The Football Supporters Association) and those with lived experience of gambling harms to further develop the campaign.

²⁸ <https://bettingandgamingcouncil.com/commitments/safer-gambling-strengthening-and-expanding-codes-of-practice-for-advertising-and-marketing>

8. Next steps

The data above demonstrates why this is a time where it is crucial that GambleAware run a campaign during the World Cup. The campaign will build on previous activity by using a tried-and-tested BetRegret platform that has shown to be effective among younger men who bet on sports²⁹. The upcoming tournament should be an enjoyable time for fans, but with the sheer volume of football and heavy promotion of gambling, it can be easy to get carried away with betting. The campaign will raise awareness of the early warning signs of gambling harms and to offer fans advice for how they can still enjoy the tournament without experiencing that sinking feeling you get after making a bet you wish you hadn't, also known as 'Bet Regret'.

The campaign is being backed by media companies offering free advertising space to promote this important issue directly to fans. Broadcasters including Sky, BT, ITV and Channel 4 have donated £1.5 million of free advertising inventory to GambleAware for its World Cup campaign, as the UK's leading gambling harms charity. This also comes as Snapchat have donated £10,000 of free media spend towards the campaign, in support of the prevention of gambling harms during the World Cup.

As with all of our campaigns, we have commissioned an independent evaluator to complete a holistic evaluation into the campaign performance. A synopsis of the results will be shared after results have been compiled in early 2023.

²⁹ See Synthesis Report: The use of research in the Bet Regret campaign
https://www.begambleaware.org/sites/default/files/2021-08/20-001116-01%20Safer%20Gambling%20Synthesis%20report%20FINAL%20v5%20ICUO_090721_clean_0.pdf

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About GambleAware:

GambleAware is an independent charity (Charity No. England & Wales 1093910, Scotland (SC049433) that champions a public health approach to preventing gambling harms. GambleAware is a commissioner of integrated prevention, education and treatment services on a national scale, with over £56 million of funding under active management.

For further information about the content of the report please contact info@gambleaware.org.