

Interim Synthesis Report – The Effect of Gambling Marketing and Advertising on Children, Young People and Vulnerable Adults

Who was the research for?

GambleAware commissioned research into the effects of gambling marketing and advertising on children, young people and vulnerable adults.

Who led the research?

Two research consortiums were commissioned to carry out this research. One was led by Ipsos MORI (in partnership with the University of Bristol, the University of Edinburgh, Ebiquity, and the Centre for Analysis of Social Media at Demos). The other was led by the University of Stirling (in partnership with ScotCen Social Research, the University of Glasgow, and the University of Warwick).

What were the objectives of the research?

The key objectives of the research were:

1. To explore whether gambling marketing and advertising affects children and young people's attitudes towards gambling.
2. To explore how gambling marketing and advertising affects children and young people's attitudes towards gambling.
3. To review the tone and content of gambling marketing and advertising across different channels.
4. To explore the potential impact of different media types on children, young people and vulnerable adults.
5. To identify themes and features of gambling marketing and advertising that children, young people and vulnerable adults are particularly susceptible to.

What did the research involve?

The research was conducted from 2018-2019, and involved the following:

1. A review of existing literature in this area.
2. Monitoring of different media channels (such as television, online, radio and Twitter) to capture the amount of gambling advertising there is; and a detailed analysis of the content of these adverts.
3. Developing online personas (avatars) to look at online advertising specifically and whether behavioural targeting is used by the gambling industry.
4. Looking at the amount and type of gambling references in television and radio broadcasts of different sports.
5. Speaking to children, young people (aged 11 to 24) and vulnerable adults to explore their views on gambling advertising and how it affects them.

This interim synthesis report looks at exposure, tone and content of gambling advertising. The final report will talk about the impact of this advertising. The final report will also use data from a survey on gambling advertising that will be carried out with children and young people, and data on how many people click through to online advertising.

Key findings:

Exposure to gambling advertising and marketing

- There has been an increase in the number of adverts and the amount spent on gambling advertising in recent years. Lotteries were the biggest spenders across most channels (except online and in the press). Although there are signs that the number of adverts and amount spent is starting to decrease in some gambling sectors and across some types of media.
- Sport is an important channel for advertising gambling, and advertising spending often increases around key sporting events.
- The research also identified the rise of advertising new forms of gambling, such as eSports. It is estimated that at least 9,000 people in the UK follow at least one of 44 identified eSports accounts. However, few of these accounts are licenced gambling operators, and so further research is required to understand whether UK users can use these accounts to place bets.
- This research found no evidence of gambling adverts that appeared to be directly and purposefully targeted at children. There was no evidence of adverts appearing in children's magazines, on popular children's websites or through online advertising. On the other hand, there was no evidence to suggest that steps had been taken to restrict exposure to gambling advertising of children and vulnerable adults based on their known browsing history.
- Despite this, children, young people and vulnerable adults do report exposure to gambling advertising. This exposure was often through TV, social media and the high street. It was described by research participants as being everywhere, on different channels and at different times of day. Participants did comment that this exposure did not necessarily lead them to engage with this directly. But, there is the potential for wider impact on awareness and attitudes towards gambling.
- Through social media analysis the research found evidence that children are following and engaging with betting related accounts on Twitter.
- It is important to note that advertising is not the only way to be exposed to gambling. Participants across the qualitative research also spoke about the role of family and friends in introducing them to gambling.

Themes and features of gambling advertising

- From analysis conducted by researchers of advertising content, a variety of themes and features were identified that are used to market gambling. Whilst the qualitative research found that there were a wide range of features that grab the attention of children, young people and vulnerable adults. These features are broader than traditional definitions of appeal which focus on the use of visual images and colours, or specific child-friendly terms. For example, this could be an emphasis on fun, financial offers and memorable songs and catchphrases. This finding highlights the challenge of making judgements on whether something does or does not appeal to children and young people.
- There was some evidence of content or features that may be appealing to children and young people in the advertising content analysed. This was language, graphics or narratives that could be directly appealing. There were also examples of tempting financial offers and adverts that created a sense of urgency.
- Some key areas of concern were raised regarding the themes and features of gambling advertising, and the potential susceptibility of children, young people and vulnerable adults

to these. For example, ads that implied that there was a limited or reduced risk (through terms such as 'risk free', overly complicated terms, or inflated chances of winning).

- The advertising content analysis showed there was little evidence of messages that may help raise awareness of the risks of gambling. Across advertising content analysed, the presentation of age warnings, promotion of lower-risk gambling, or of terms and conditions was judged to be poor. Notably those we spoke to had mixed levels of understanding of messages of risk and messages to gamble responsibly. The majority of children and young people felt that in theory, gambling could be enjoyable; however, understanding of risk varied.

Key recommendations:

It is too early to report on the impact of exposure to gambling advertising and marketing on children, young people and vulnerable adults within this Interim Synthesis report. This will be done in the final Synthesis Report. However, there are still some clear areas where Ipsos MORI have suggested action should be taken. These are steps to reduce risk of exposure and appeal of gambling adverts:

1. Technology should be used more often to try to reduce exposure to gambling advertising online. Gambling adverts should not be shown online to people that can be clearly identified as children using technology. Alongside this age verification processes on social media platforms should be strengthened.
2. There should be clearer messages on gambling adverts of the risks associated with gambling. These risk messages should be shown more often.
3. Ensuring that current regulation and guidance are applied to licenced eSports operators as the market develops.
4. A review of existing gambling advertising rules is needed to decide whether these rules need updating or explaining further. Particularly the current guidance to decide whether advertising content is likely to attract the attention of children, young people and vulnerable adults.
5. Further areas of research have been identified, such as looking at the impact of gambling advertising over time.