



# **Report on campaign evaluation for The Senet Group**

**March 2017**

# Public survey - context and methodology

This is the fifth research wave since Senet Group activity began at the start of 2015

Survey runs twice per year - March and September

This research wave was conducted Friday 24th - Monday 27th March

Nationally representative sample of 2,000 adults

Operated by Bilendi - an independent research company

# Campaign is now recognised by over half the UK, and 3/4s of regular gamblers. Window posters are most recognised creative

Awareness of campaign amongst all adults

	Mar '17
<b>Total campaign</b>	<b>53%</b>
Permanent betting shop window posters	40%
TV (Bungalow)	31%
TV (Betting Shop)	19%
Press creative (e.g. Always chasing losses)*	27%
Digital / Social creative (e.g. Just £40 more)*	18%
Poster creative (e.g. How much = too much?)*	20%
Radio	10%

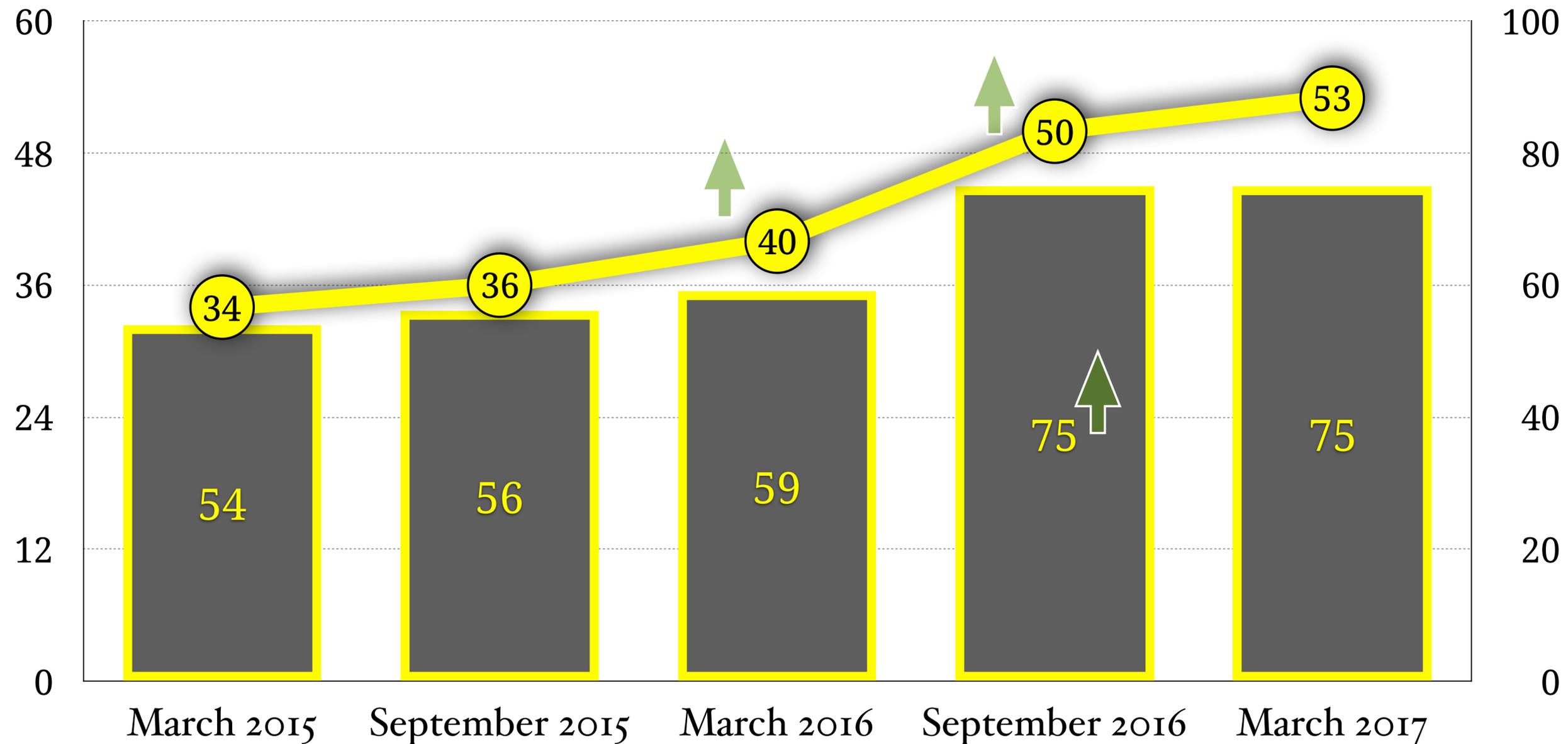
Awareness of campaign amongst regular gamblers\*\*

	Mar '17
<b>Total campaign</b>	<b>75%</b>
Permanent betting shop window posters	59%
TV (Bungalow)	43%
TV (Betting Shop)	31%
Press creative (e.g. Always chasing losses)*	29%
Digital / Social creative (e.g. Just £40 more)*	18%
Poster creative (e.g. How much = too much?)*	21%
Radio	17%

\*Much of the press, digital/social and poster creative has been re-purposed in different channels, so scores in one of these channels may have been helped by similar-looking creative in a different channel.

\*\*Regular gamblers have been defined as those who gamble twice or more a month. This equates to approx 25% of the total UK adult population.

# Campaign recognition continues to grow amongst the total population



% campaign recognition amongst all adults

% campaign recognition amongst regular gamblers

Statistically significant difference

Audience: All adults, across five research waves. Base size for each research wave: 2,015; 2,000; 1,986; 2,000; 2,000. Regular gamblers in each research wave: 522, 464, 501, 481, 484

# Betting sites are the most common place for regular gamblers to see 'WTFSS' online, but it is elsewhere for everyone else

Amongst campaign recognisers: where online, or on your mobile, have you seen this advertising?

	Regular gamblers	All adults
On betting websites	58%	35%
In betting apps	34%	21%
On the social media accounts of betting companies	22%	20%
On social media - but not from betting companies	12%	20%
Elsewhere online (e.g. newspaper website)	33%	49%

Audience: All adults. Base size: 2,000. Regular gamblers: 484

# There is high awareness for the main responsible gambling 'tips' - especially amongst regular gamblers

Awareness of 'tips' for responsible gambling amongst regular gamblers

	Mar '17
Set your limits at the start	83%
Only bet what you can afford	90%
Never chase your losses	81%
Don't bet if you're getting angry	67%
Never put betting before your mates	50%

Awareness of 'tips' for responsible gambling amongst all adults

	Mar '17
Set your limits at the start	76%
Only bet what you can afford	83%
Never chase your losses	74%
Don't bet if you're getting angry	67%
Never put betting before your mates	50%

# Awareness of these betting 'tips' amongst the general population has steadily grown

% awareness of three main 'tips' for responsible gambling amongst all adults



Only bet what you can afford

Set your limits at the start

Never chase your losses

Statistically significant difference

Audience: All adults, across three research waves. Base size for each research wave: 1,986; 2,000; 2,000

# Both TV executions continue to offer high stand out and memorability, whilst also being seen to “make a good point”

% agreeing in their responses to TV creative, after having seen the ads

	<i>'Bungalow'</i>	<i>'Betting Shop'</i>
It stands out	54%	50%
It is more involving than other advertising	47%	42%
It is irritating	20%	24%
It makes a good point	69%	67%
It is an ad I enjoy	29%	26%
It is funny	27%	24%
It is memorable	51%	47%
I don't really understand it	12%	10%
It made me stop and think	31%	31%

Figures for norms are unfortunately unavailable, though tracking company ICM reported that these stand out, memorability and ‘makes a good point’ scores seemed particularly strong - especially for the ‘Bungalow’ execution.

Audience: All adults. Base size: 2,000

# The campaign continues to generate word-of-mouth support from millions of people

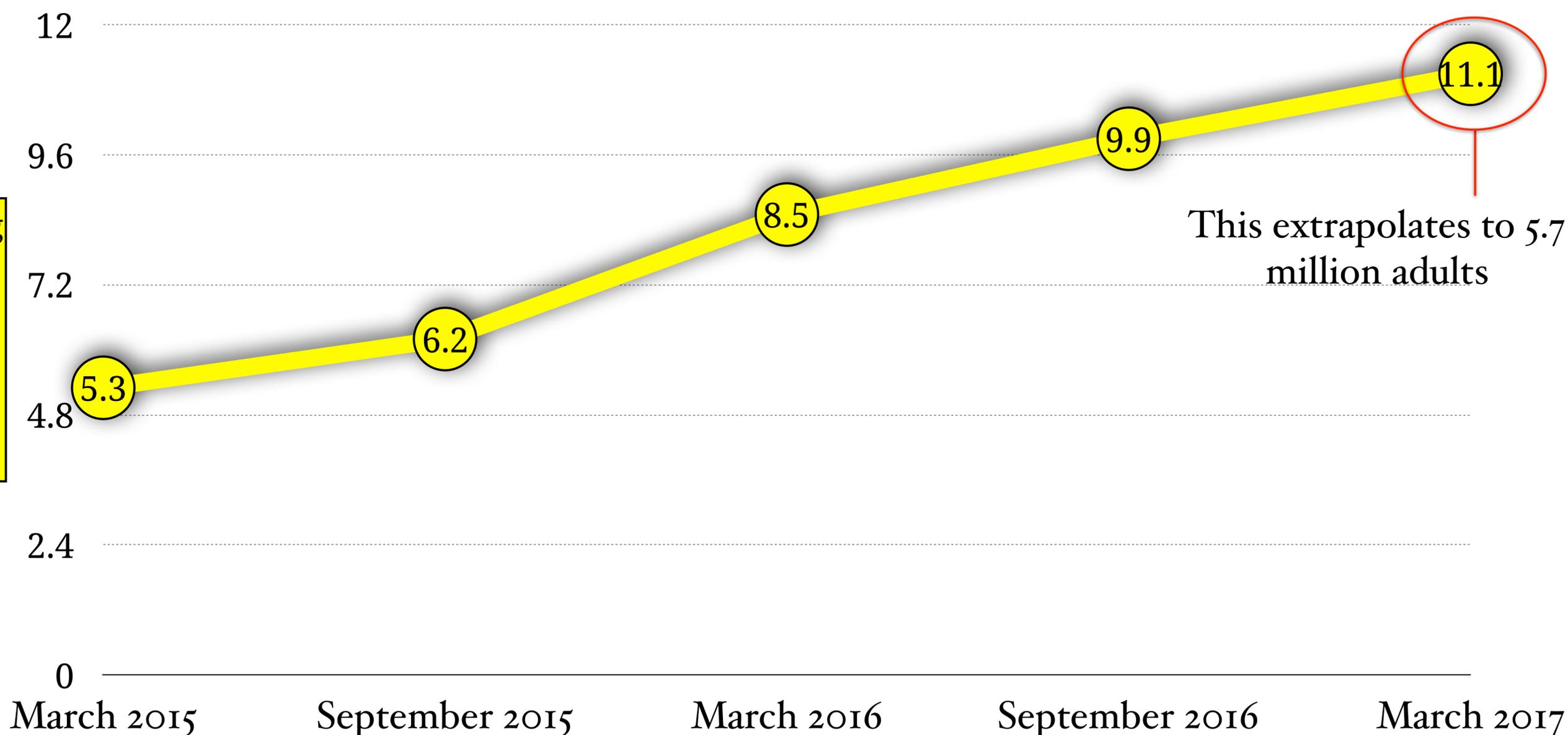
Of those who recognise the campaign, % agreeing it has made them do the following:

	Regular gamblers	All adults	When factoring campaign recognisers against the total UK population, this equates to:
Led me to warn other people about their gambling, if only jokingly	20%	20%	5.7 million adults
Use the phrase: “When the fun stops, stop” or the hashtag #whenthefunstopsstop	10%	9%	2.6 million adults

Audience: Campaign recognisers. Base size: 2,000. Source for population figures: Office of National Statistics

# There number of people warning others about their gambling, 'if only jokingly', has steadily increased over research waves

% of all adults agreeing the campaign has 'led me to warn other people about their gambling, if only jokingly'



# Large numbers of people now claim a more responsible attitude and approach to gambling

Of those who recognise the campaign, % agreeing that it has made them feel/do the following:

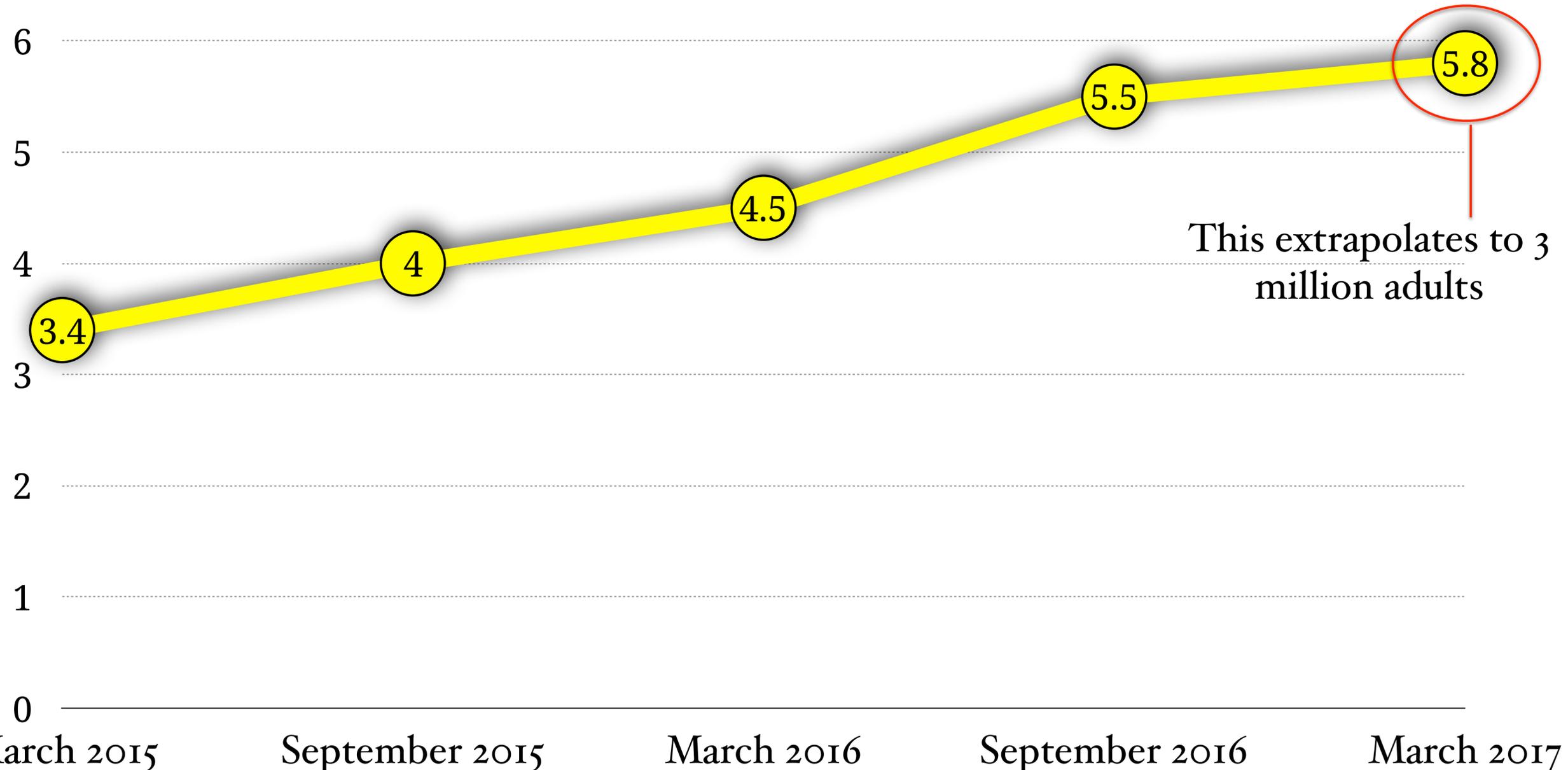
	Regular gamblers	All adults
Made me more aware that gambling can become a problem for some people	66%	72%
Made me think about my own gambling behaviour	31%	16%
Has helped me approach gambling more responsibly	24%	17%
Has helped me - at least once - stop gambling more than I should	18%	10%

ICM point out that scores over 25% for any made me think about x"-type statement are very good

Equivalent to 4.9 million adults

Base size: 2,000. Source for population figures: Office of National Statistics

# The number of people who have stopped gambling more than they believe they should, has also grown over research waves



% of all adults agreeing the campaign has 'has helped me - at least once - stop gambling more than I should'

This extrapolates to 3 million adults

Statistically significant difference

Audience: All adults, across five research waves. Base size for each research wave: 2,015; 2,000; 1,986; 2,000; 2,000