



Report on campaign evaluation for The Senet Group

October 2017

Public survey - context and methodology

This is the sixth 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 22nd - Monday 25th September

Nationally representative sample of 2,001 adults

Operated by Bilendi - an independent research company

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

Awareness of campaign amongst all adults

	Sep '17
Total campaign	54%
Permanent betting shop window posters	44%
TV (Bungalow)	32%
TV (Betting Shop)	18%
Press / Poster creative (e.g. Always chasing losses)*	35%
Digital / Social creative (e.g. Just £40 more)*	17%
Radio	10%

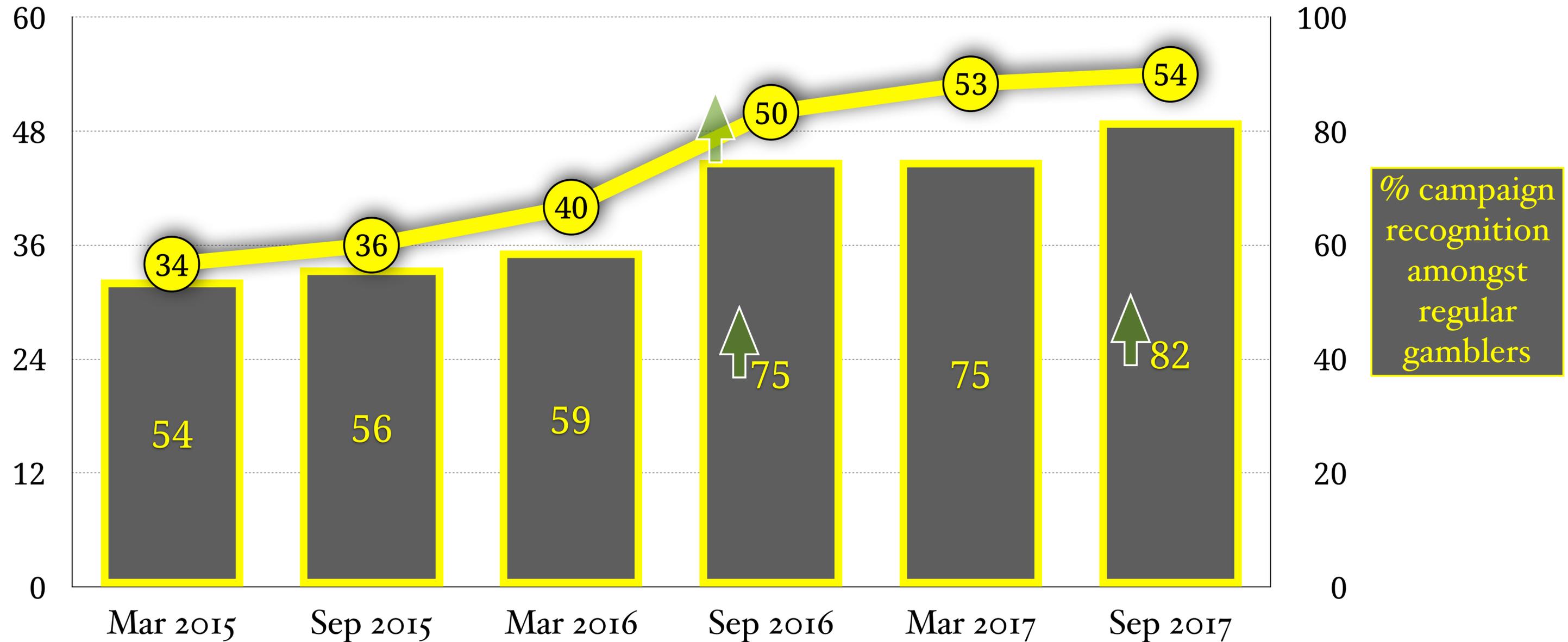
Awareness of campaign amongst regular gamblers**

	Sep '17
Total campaign	82%
Permanent betting shop window posters	68%
TV (Bungalow)	51%
TV (Betting Shop)	31%
Press creative (e.g. Always chasing losses)*	57%
Digital / Social creative (e.g. Just £40 more)*	35%
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 both regular gamblers and the total population



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; 2,001. Regular gamblers in each research wave: 522, 464, 501, 481, 484, 468

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	57%	33%
In betting apps	33%	18%
On the social media accounts of betting companies	23%	21%
On social media - but not from betting companies	18%	21%
Elsewhere online (e.g. newspaper website)	33%	49%

Audience: All adults. Base size: 2,001. Regular gamblers: 468

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

Awareness of 'tips' for responsible gambling amongst regular gamblers

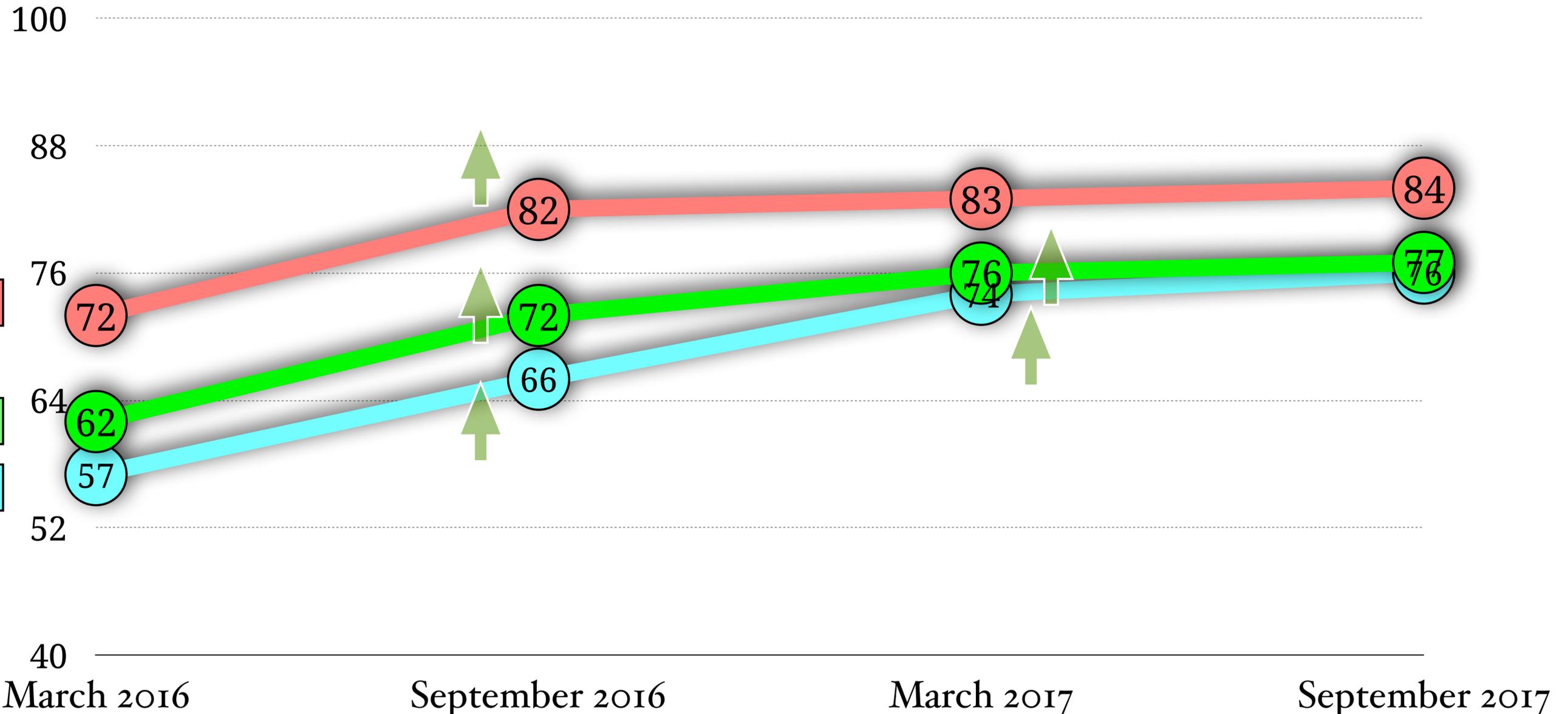
	Sep '17
Set your limits at the start	87%
Only bet what you can afford	84%
Never chase your losses	76%
Don't bet if you're getting angry	68%
Never put betting before your mates	52%

Awareness of 'tips' for responsible gambling amongst all adults

	Sep '17
Set your limits at the start	77%
Only bet what you can afford	84%
Never chase your losses	76%
Don't bet if you're getting angry	68%
Never put betting before your mates	52%

Awareness of the main betting 'tips' amongst the general population continues to steadily increase

% 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; 2,001

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	55%	50%
It is more involving than other advertising	47%	43%
It is irritating	22%	23%
It makes a good point	70%	70%
It is an ad I enjoy	28%	26%
It is funny	26%	23%
It is memorable	52%	49%
I don't really understand it	11%	9%
It made me stop and think	31%	33%

Audience: All adults. Base size: 2,001

The campaign has prompted almost 6 million people to warn others about their gambling, 'if only jokingly'

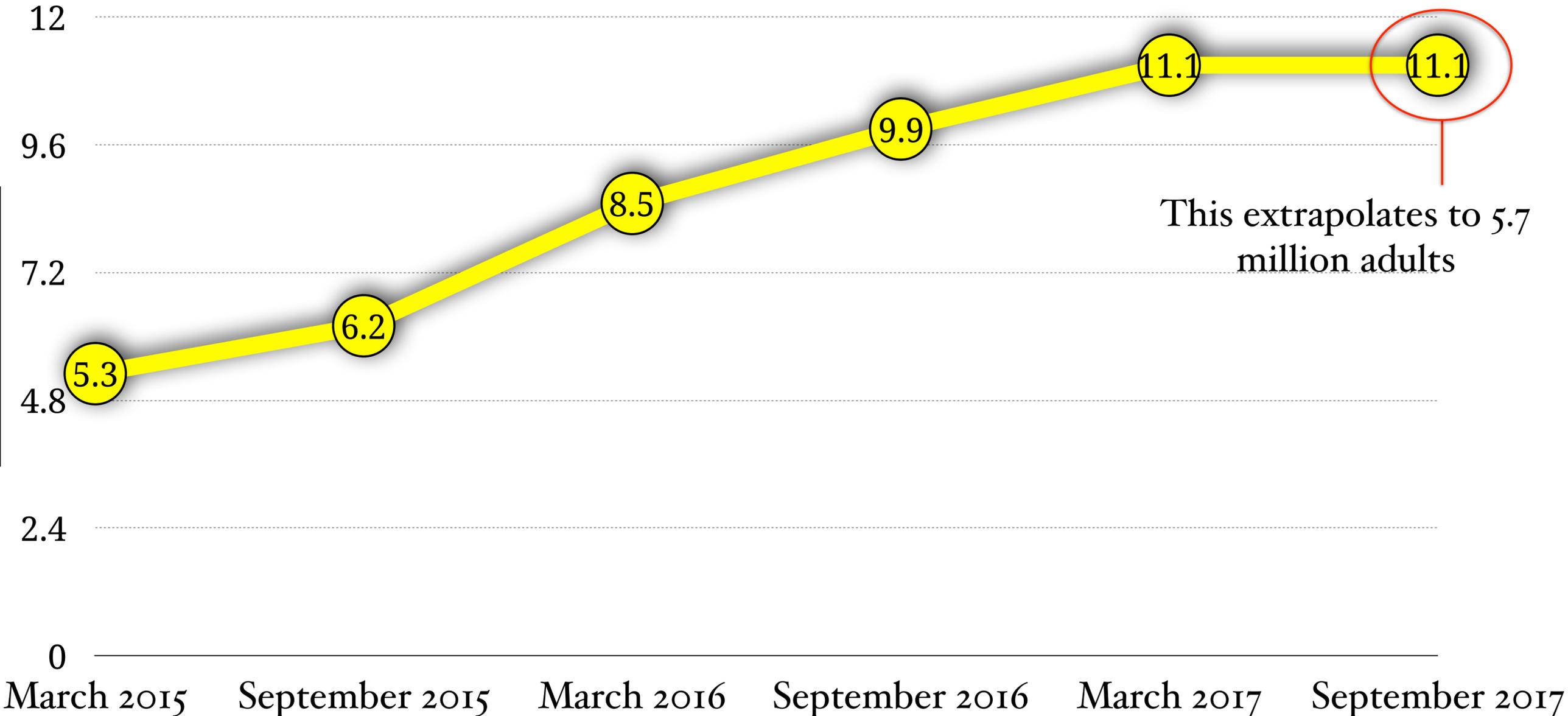
Of those who recognise the campaign, % agreeing it has made them do the following:

	Regular gamblers	All adults	
Led me to warn other people about their gambling, if only jokingly	23%	19%	When factoring campaign recognisers against the total UK population, this equates to: 5.7 million adults
Use the phrase: "When the fun stops, stop" or the hashtag #whenthefunstopsstop	15%	12%	3.8 million adults

Audience: Campaign recognisers. Base size: 2,001. Source for population figures: Office of National Statistics

The number of people warning others about their gambling, 'if only jokingly', has remained consistent

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



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

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:

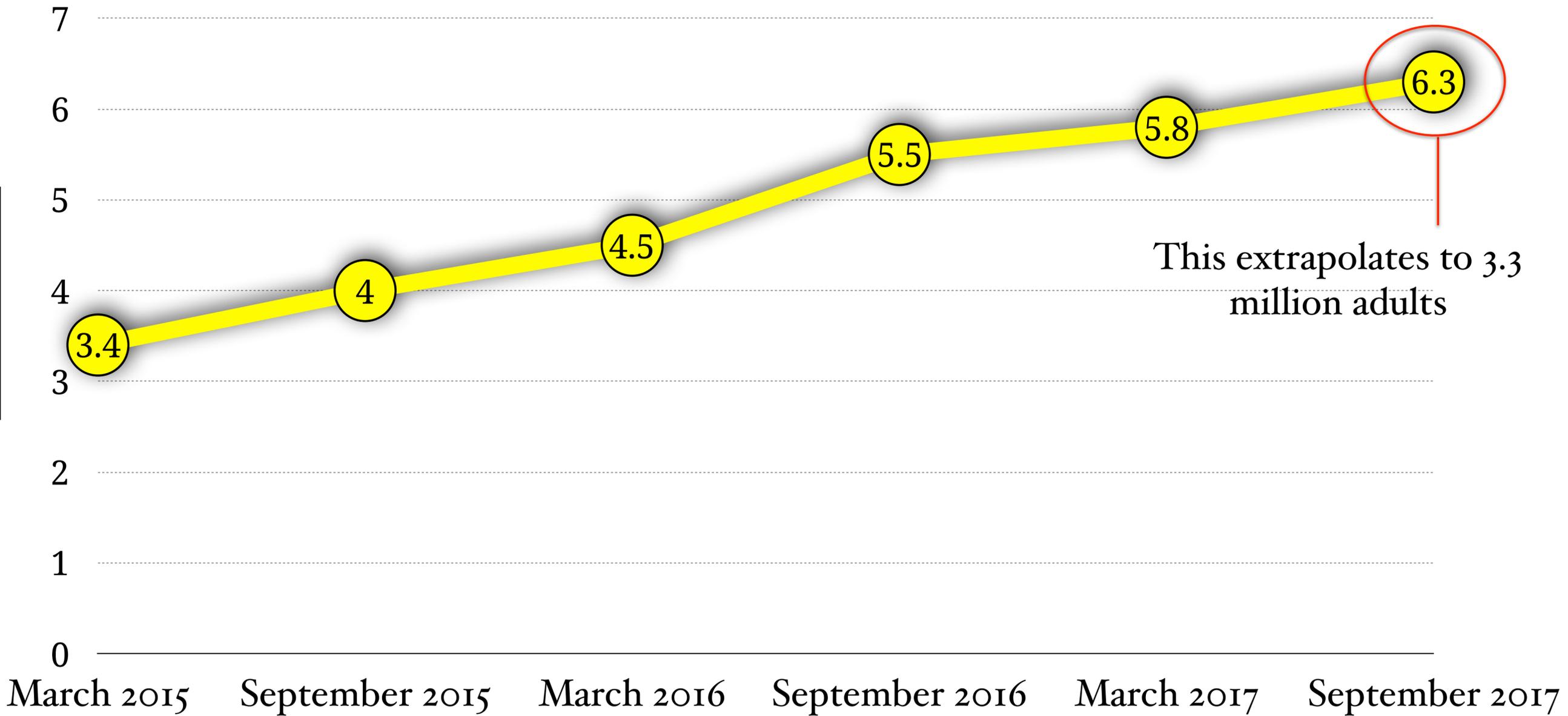
	Regular gamblers	All adults
Made me more aware that gambling can become a problem for some people	62%	69%
Made me think about my own gambling behaviour	33%	16%
Has helped me approach gambling more responsibly	23%	18%
Has helped me - at least once - stop gambling more than I should	18%	11%

One-third of regular gamblers say the campaign has led them to think further about their gambling behaviour

Equivalent to 5.4 million adults

There has been a consistent increase in the number of people who have stopped gambling more than they believe they should

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



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