

Gambling Management tool survey results

July 2023



Executive summary

BIT's Gambling Policy & Research Unit conducted an online survey with a sample of 2,201 UK frequent gamblers to learn more about their opinions towards gambling management tools. The specific focus was on their **comprehension and awareness** of current gambling tools and opinion towards potential new tools, including design features

Key findings:



Only around a third to a half of participants correctly understood most tools, suggesting more needs to be done to increase comprehension which may in turn increase use.



Raising awareness of tools should be a priority. In particular, de-stigmatising the use of tools through social norms could be effective.



37% of participants wanted a tool to apply across all gambling accounts they hold. This is a significant minority and lends support to a single customer view.



We used this survey to understand **comprehension and awareness** of current gambling tools and opinion towards potential new tools, including design features



i) What is the current comprehension and awareness of gambling management support available?

- Which tools do gamblers find most useful?
- What are the motivations for setting up a new tool?



ii) How do gamblers feel about potential new tools (tools that are already available but are less well known)?



iii) Do gamblers want to use more than one tool at the same time? If so, what is the ideal combination of tools?

The survey consisted of **two parts**:

- Part 1, containing **general questions on gambling management tools**
- Part 2, containing **questions on activity statements**



We recruited a sample of 2,201 current UK gamblers, representative of the UK gambling population

The Behavioural Insight Team's Gambling Policy & Research Unit (GPRU) worked with Predictiv, our policy-testing lab, to survey 2,201 UK frequent gamblers¹ who gamble online. The survey was open between the 19th to 29th of January, 2023. The median time spent completing the survey was 11 minutes 52 seconds.

The aim of the survey was to further understand gamblers' awareness, use and attitude towards safer gambling tools.

Gambling risk ²	
Non-risk	39%
Low risk	12%
Moderate risk	21%
Problem gambler	28%

Region	
South & East	34%
North	24%
Midlands	17%
Scot/NI/Wales	13%
London	13%

Gender	
Women	47%

Ethnicity	
White	78%
Asian	9%
Black	6%
Mixed / other	8%

Age	
18-24	14%
25-54	68%
55+	18%

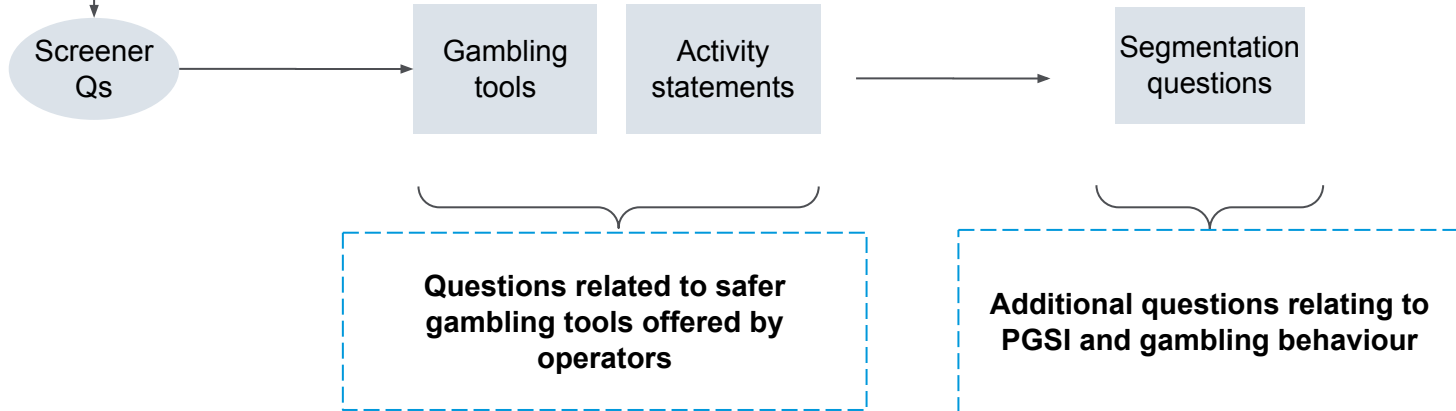
¹ Adults gambling on any type of gambling activity, excluding the National Lottery, at least once per month

² Based on short-form PGSI.



Participants answered general questions on safer gambling tools, before answering questions on activity statements

Predictiv
sample
 $N = 2,201$

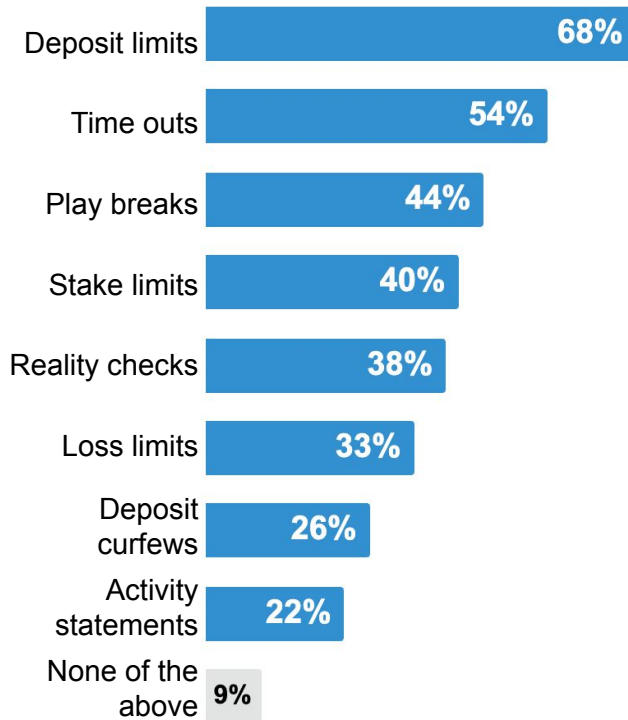


Part 1- General questions



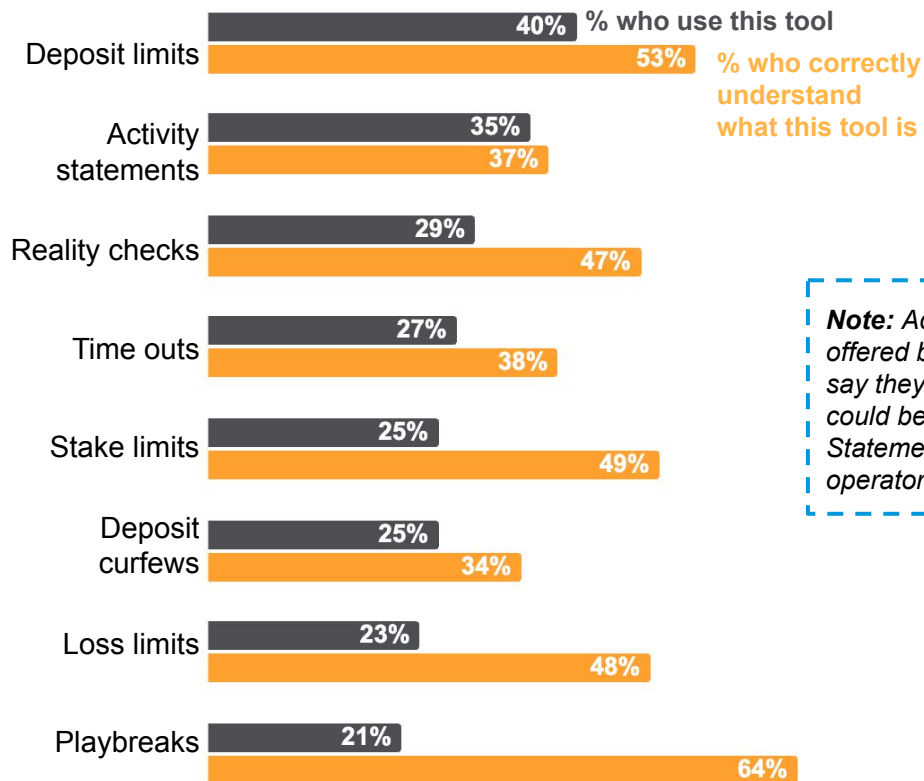
Participants were most aware of deposit limits and time outs, however general awareness of other tools was low

Have you heard of any of the following tools to help people with their gambling?





The most used tools are deposit limits and activity statements. For the majority of tools, 50% or less of participants correctly understood what they were

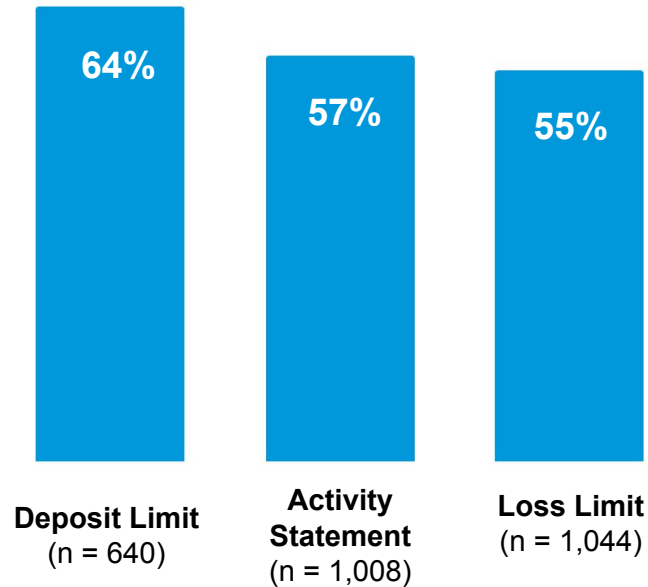


Note: Activity Statements are not yet offered by operators. The 35% who say they've used Activity Statements could be confounding Activity Statements with other tools on operator sites, e.g. profit/ loss tools.



Participants were more likely to say they would use deposit limits than activity statements or loss limits in the future

Of those who don't currently use, **How likely would you be to use each of these online gambling tools in the future?** (% who said Moderately or Very likely)

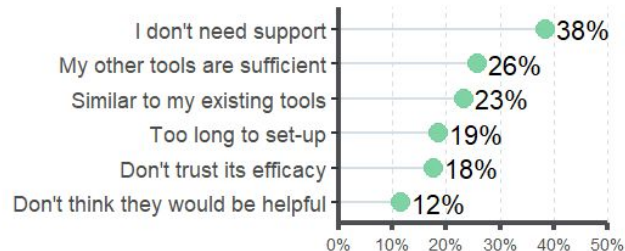




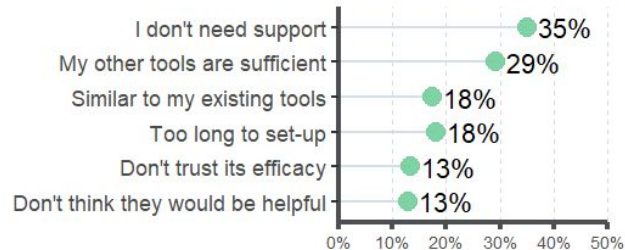
Not needing support, and using other tools that are sufficient, were the top two reasons for not using a deposit limit, loss limit or activity statement in the future

Reasons why they wouldn't use a...

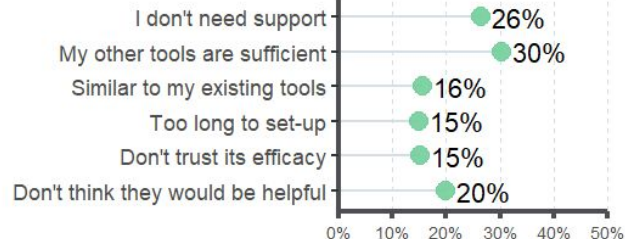
... a deposit limit
(n = 232)



... a loss limit
(n = 468)



... an activity statement
(n = 435)





The most popular set-up option of gambling management tools was being shown all gambling accounts and choosing which accounts the tool should apply to

Imagine you are about to set up a gambling management tool (e.g. a deposit limit tool) with one of the gambling companies. Which of these options would you prefer?



37%

I am presented with all of my gambling accounts at the time of signing up and I **choose which accounts** I want the tool to apply to



33%

I **manually** sign up to the tool for each gambling account I have



30%

When I sign up for a tool in one gambling account, I am **automatically signed up** for the tool with all my other accounts

Key findings

1. Awareness and understanding of gambling management tools varies across tools. Apart from deposit limits, 50% or less of people correctly understood what other tools were.
2. Use of deposit limits is quite high, at around 4 in 10 people saying they had used them previously. Use drops to below 3 in 10, for other named tools.
3. More than 5 in 10 people would use a deposit limit, activity statement or loss limit in future with many saying they'd use more than one tool at the same time.

Takeaways:



Only around a third to a half of participants correctly understood most tools, suggesting more needs to be done to increase comprehension which may in turn increase use.



Raising awareness of tools should be a priority. In particular, de-stigmatising the use of tools through social norms could be effective.



37% of participants wanted a tool to apply across all gambling accounts they hold. This is a significant minority and lends support to a single customer view.

Part 2- Activity Statements



People would prefer to receive their activity statements through their app or in an on-screen notification and 6 in 10 want them to come from their gambling company

Ranking of different ways to receive an activity statement*

(n = 2,201)



In-app or on-screen notification



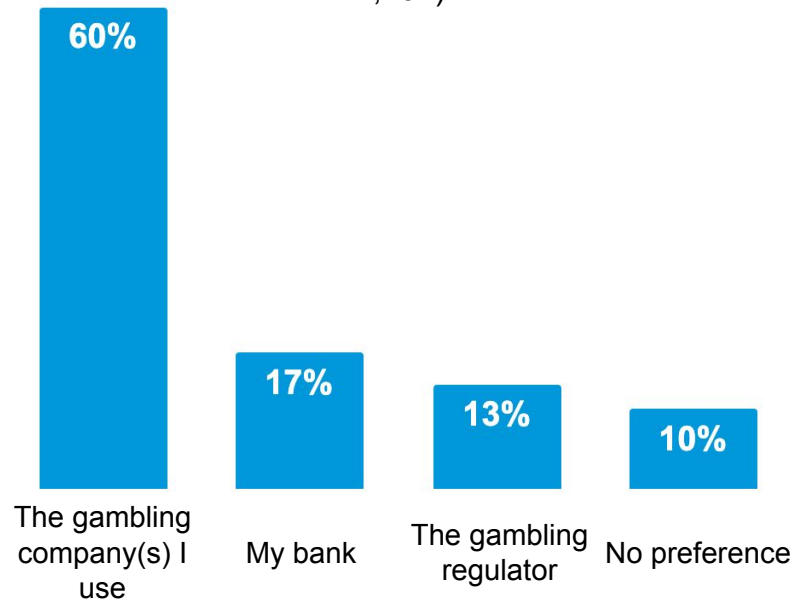
Text



Email

Who would you prefer to receive your activity statement from?

(Participants could select one answer; n = 2,201)



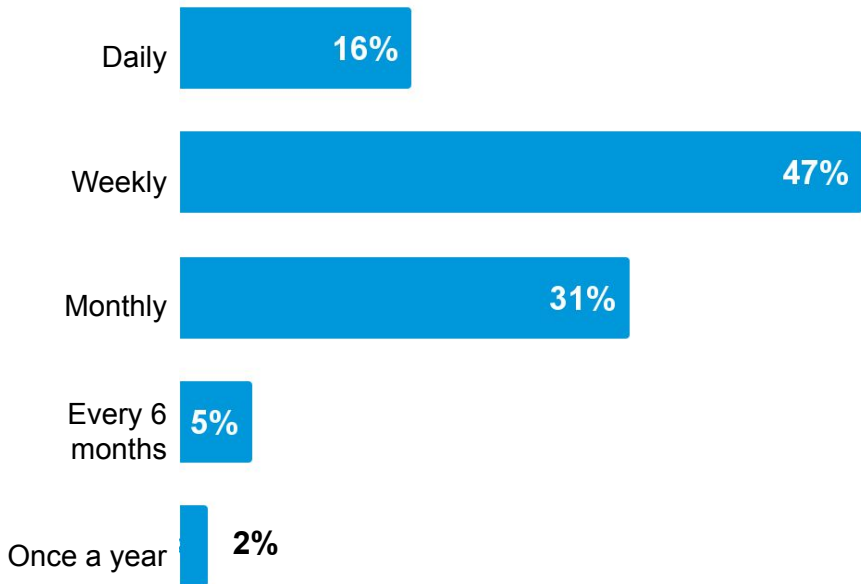
* Participants ranked each of the ways to receive an activity statement. This ranking, where 1 is given to their top choice, 2 to their second choice, and so on, was averaged across the sample and the ranking of those averages is shown here. Data collected by BIT on 19 - 29 January 2022.



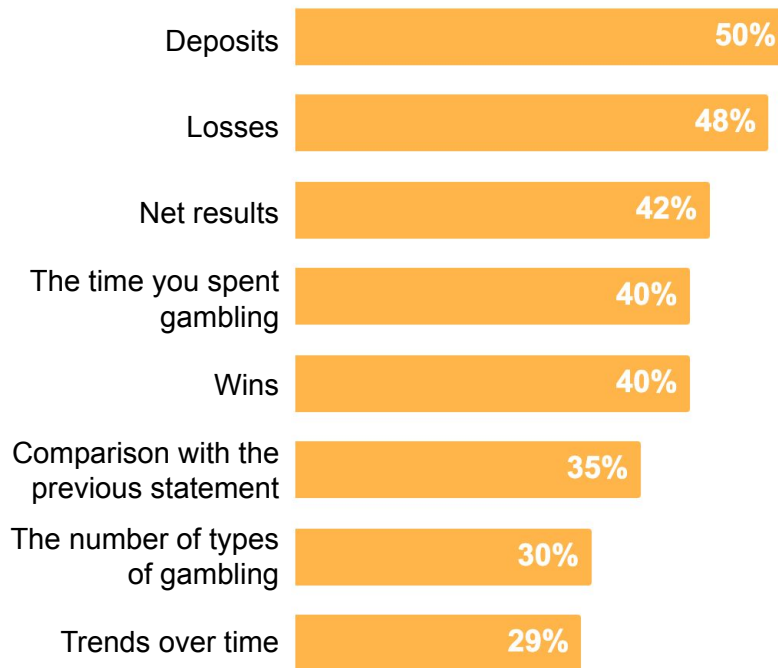
6 in 10 would want to receive their activity statements at least once a week. The most important metrics to people are deposits, losses and net results.

Of those who are at least a little likely to use activity statements, How frequently would you want to receive these statements?

(Participants could select one answer, n = 915)



Which of these features would you like to see in an activity statement? (n = 2,201)





Sentiment towards activity statements is mostly positive, and this is not impacted by whether it would be a combined activity statement or a separate one per company.

Participants were randomly assigned to answer questions about their sentiment towards an activity statement that combines your activity across each of the three companies or three separate activity statements per company.

	Combined statement (n = 1,137)	One per company (n = 1,064)
Overall positive sentiment score (average percentage of people who agree this kind of activity statement is: useful, easy to understand, and supportive and encouraging)	69%	68%
Overall negative sentiment score (average percentage of people who agree this kind of activity statement is: patronising, irritating, and stressful)	25%	24%

Key findings

1. People would prefer to receive an activity statement via a gambling operator mobile app, or via an on-screen mobile notification.
2. People would prefer to receive an activity statement weekly (47%), followed by monthly (31%)
3. The most popular features people want to see in their activity statements include deposits, losses and net results.
4. Sentiment remains positive regardless of whether people anticipate receiving one combined statement, or several statements.

Takeaways of research phase



Any test of activity statements should include mobile users as well as desktop users.



The content of the activity statement should highlight deposit, losses and net results.



There is variation in preferences for frequency of receiving an activity statement, suggesting that an element of personalisation should be introduced if activity statements are implemented with a meaningful default.



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