

GambleAware: Segmentation 2023

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YouGov®

Introduction

Method

Objective

- GambleAware wanted to segment people based on different user states relating to advice, tools and support
- This would enable more effective targeting of communication and appropriate services
- The project brings new ways of looking at the audience
GambleAware wants to engage with, with fresh insights that drill down into what they want

Method

- 3-staged approach:
 - Initial qualitative interviews, 30 – 45 minutes, telephone / Zoom with 12 people who gamble (conducted between 13th and 24th March 2023)
 - These exploratory interviews informed the content for the main survey
 - An online survey (conducted between 16th May and 12th June 2023)
 - 7,028 people who gamble
 - This included questions around perceptions of reducing/quitting gambling, including motivators and barriers
 - More information on how people are invited to the survey can be found in the Appendix
 - Statistical significance testing between groups (using t-tests) is shown throughout (with arrows) for quantitative data
 - 7-day online community (conducted between the 21st to 27th August 2023) with 51 people from five segments identified in the quantitative stage – Self Helpers, Tool Seekers, Informal Support Seekers, Formal Support Seekers and Non-Seekers (Reluctant)
 - A community is an online platform where respondents are given different tasks/prompts each day
 - This gave additional insights into the segments and brought them to life, choosing to focus on the five priority segments
 - All quotes in the report are from this stage
- It is worth noting that some qualitative respondents' attitudes towards advice, support and tools developed through the course of the study due to the nature of being asked reflective questions

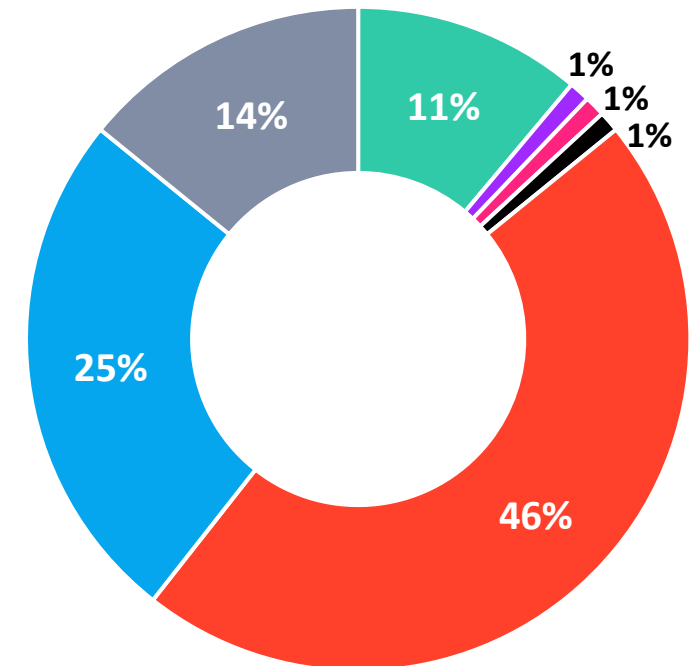
The segments

The approach

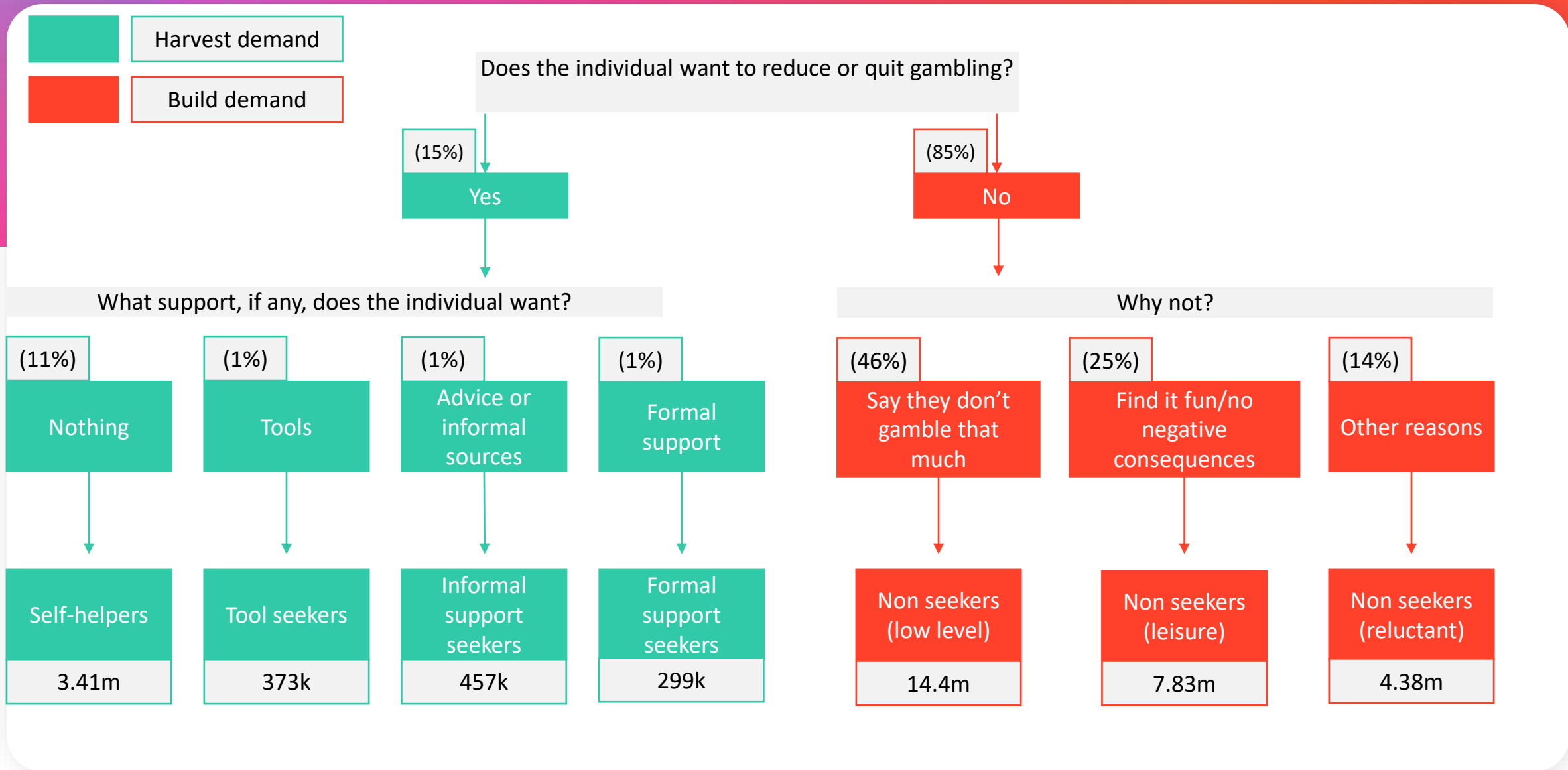
- YouGov followed a rules-based approach to classify people who gamble (including any PGSI score) in different segments
- These segments were based on people's attitudes to receiving advice, support and tools for their gambling, including whether people wanted to quit or reduce
- A number of iterations were considered, with the **7 segment approach** found to be most appropriate

How this looks among people who gamble

- Self Helpers
- Tool Seekers
- Informal Support Seekers
- Formal Support Seekers
- Non Seekers (Low Level)
- Non Seekers (Leisure)
- Non Seekers (Reluctant)



Each segment is aligned in their shared views over accessing advice, support and treatment e.g. 100% of Tool Seekers express a preference for tools. However, Tool Seekers also show an interest in informal support etc.



We produced a rules-based segmentation. The answers feeding into each segment are shown on this slide. We have produced estimates for the total number of people falling into each segment based on ONS estimates.

Segments wanting to quit/reduce

Self Helpers

- Self Helpers want to quit or reduce, without advice or support
- That said, when probed they see the use in different methods and have tried some previously
- They have a similar age and gender profile to people who gamble overall, which differs from the support seeking segments
- As with Tool and Informal Support Seekers, they are more likely to reduce than quit
- They have lower PGSI scores on average (3) than the other support seeking segments, which could explain why they don't want support
- When thinking about what they would hypothetically find helpful, informal support is preferable, with anonymity key
- Financial reasons would motivate them to quit or reduce, whilst their barriers vary on an individual basis

Tool Seekers

- Tool Seekers want to quit or reduce, using tools
- They have the highest average PGSI score (10) of the segments
- They tend to be young men and are more likely to be ethnic minorities and on lower incomes than average
- They are the most likely to want to reduce (as opposed to quit) which could be due to the stage they are at in their journey
- Most had set time outs, deposit limits or restrictions previously, however some felt these were limited as they could just remove these limits – which can act as a barrier to these being effective
- They express a strong preference for online support, with a sense that reaching out for in person support would feel embarrassing
- Finances and severe negative impacts of gambling (e.g., mental health, relationships) are key barriers

Informal Support Seekers

- Informal Support Seekers want to quit or reduce, with informal support
- Again, there is a preference for reduction (as opposed to quitting)
- They have high average PGSI scores (9)
- They have a similar demographic profile to Tool Seekers
- Previously 15% of this segment have used formal support
- Many have experienced shame around their gambling, and prefer to seek help by themselves or from people they know (as opposed to strangers)
- Support needs not to feel intrusive, so they can keep it private and give them an opt-out
- As with Tool and Formal Support Seekers, finances and some of the more severe negative impacts of gambling are motivators
- Barriers include the prevalence of gambling ads and shops, and fears over success

Formal Support Seekers

- Formal Support Seekers want to quit or reduce, with formal support
- Unlike the other support seeking segments, they are more likely to want to quit than reduce and are further along in their journey
- Similar to Tool and Informal Support Seekers, they have high average PGSI scores (9)
- Previously they have tried a range of self-directed methods to keep them occupied/distracted, along with informal support
- They think that formal support may be effective, but they don't all know how to go about finding it
- They also express some concerns around the embarrassment linked to formal support, and would prefer this to be one-to-one
- They share similar barriers to Tool and Informal Support Seekers, though also cite a lack of support from family and friends

Segments not wanting to quit/reduce

Non-Seekers (Low Level)

- Non-Seekers (Low Level) don't want to quit or reduce, as they don't think they gamble that much
- With that, the vast majority haven't tried to quit or reduce previously and want to continue gambling at their current level
- As their name indicates, they gamble at low levels with an average PGSI score of 0
- This is the only segment with a female majority, and has an older age profile than those wanting to quit or reduce
- Related to their low PGSI score, this segment are the least likely to consider themselves someone who gambles
- Despite this, similar to other segments a majority in this segment agree that there are too many opportunities to gamble

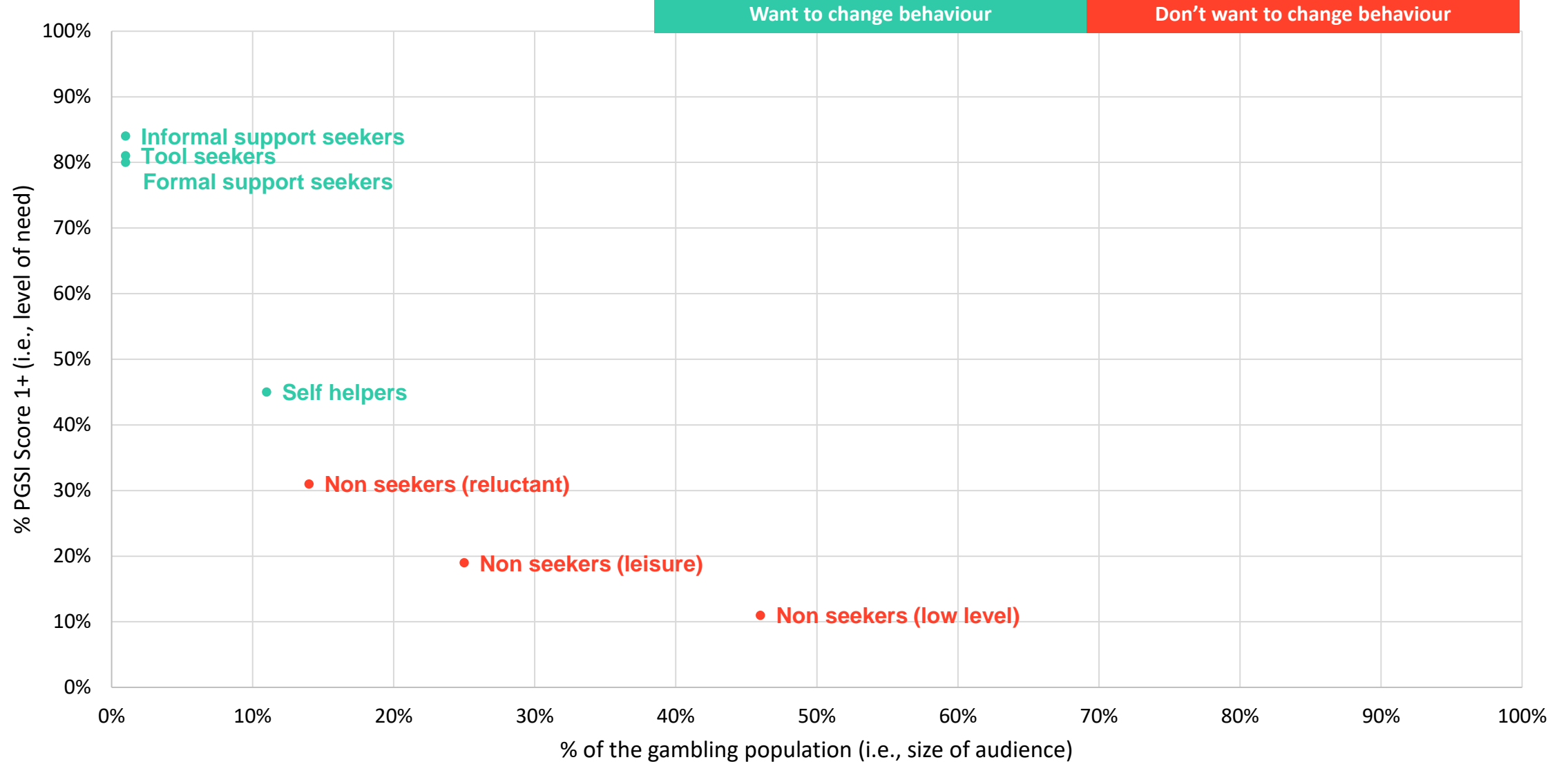
Non-Seekers (Leisure)

- Non-Seekers (Leisure) don't want to quit or reduce, as they find it fun or don't feel they get negatives from it
- As with the other non-support seeking segments, they haven't tried to change their behaviour previously and most want to continue gambling at their current level
- They have low PGSI scores on average (1)
- They have a fairly similar demographic profile to people who gamble overall, though are slightly older
- Whilst most disagree that they are someone who gambles, agreement is higher than for other segments which could be due to them seeing gambling as fun

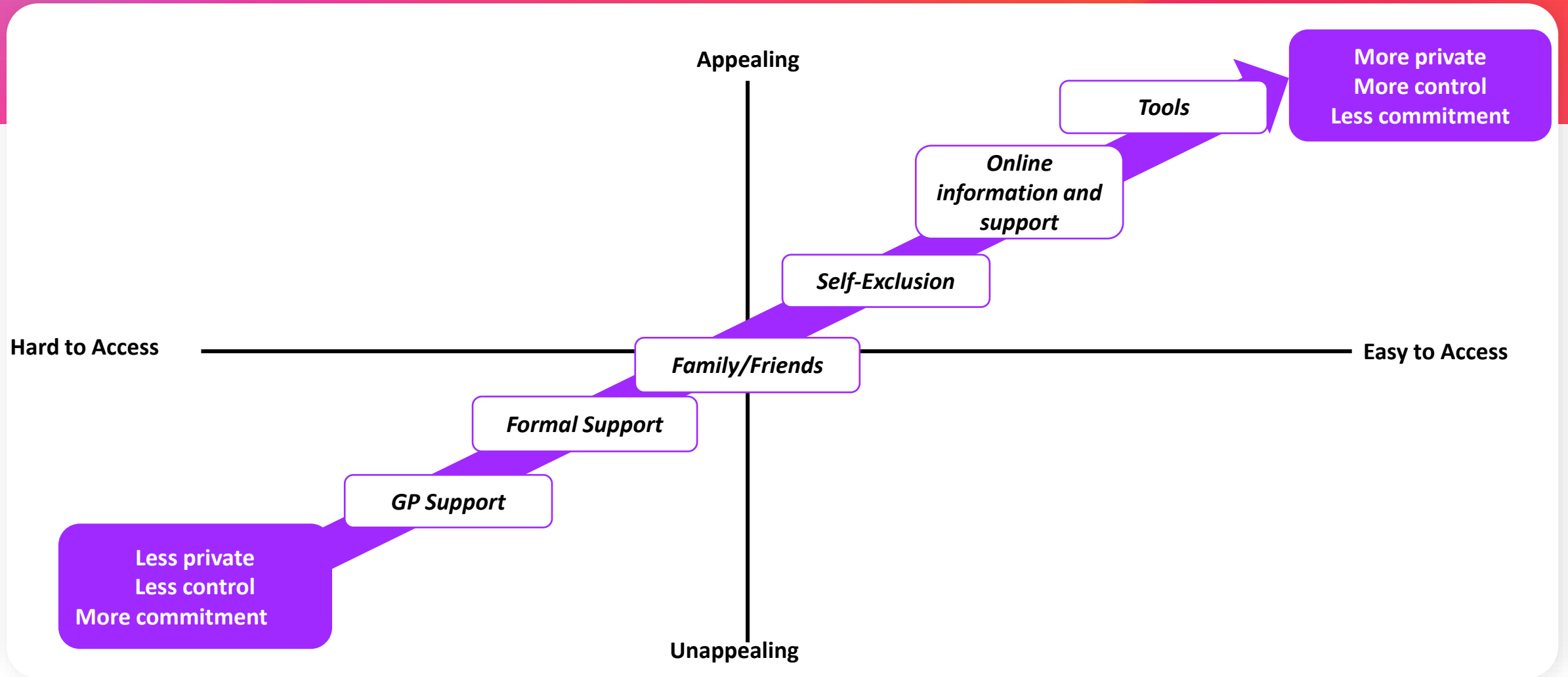
Non-Seekers (Reluctant)

- Non-Seekers (Reluctant) don't want to quit or reduce, for other reasons than the other non-seeker segments (e.g., they make money from it, wouldn't gain anything from doing so)
- They are more likely than the other segments to say they want to gamble more in the future, though most want to continue at their current level
- Of the non-support seeking segments, they have the highest average PGSI score (3)
- Many haven't sought support before
- Convenient, non-judgmental support would be preferable, with one-to-one sessions preferred over group discussions (which lacks anonymity)
- They lack motivation to change their behaviour, though could be prompted during specific times (e.g., repaying debt or saving money)
- Quitting/reducing is seen as an obstacle to the income and enjoyment they get from gambling

Those who want support to help them either quit or reduce are more likely to be PGSI 1+ than those who do not want support or who don't want to change



Overall, the qualitative research found that these segments lean towards online methods/support as they are seen to be completely private and involve little commitment



Segment 1 Self Helpers

Self Helpers want to quit or reduce, and say they would do so without advice or support

Who are they?



Audience description

This segment want to quit or reduce their gambling without any external support (e.g. advice, support or tools).



Perceptions of quitting and reducing

They are more likely to want to reduce their gambling (69%), as opposed to quit (31%). Among those wanting to reduce or quit, this segment are the least likely to have made an attempt to do so in the last 6 months.



Gambling problems

This group tends to be experiencing a moderate level of problems from their gambling, with an average PGSI score of 3. Two in five (45%) have a PGSI score of 1+.



Demographics

This segment has a similar age and gender profile to people who gamble overall. This differs from the other segments wanting to quit or reduce which are skewed to young men.



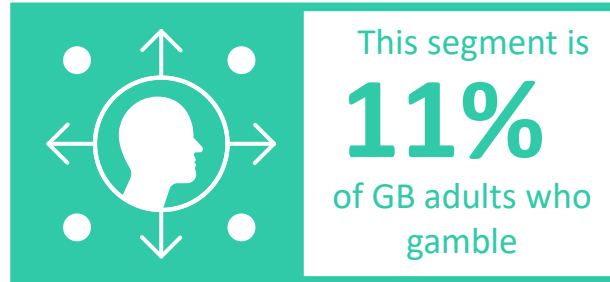
Gambling Activities

1. National Lottery Tickets – 74%
2. Scratch Cards – 36% ↑
3. Sports Betting – 32%

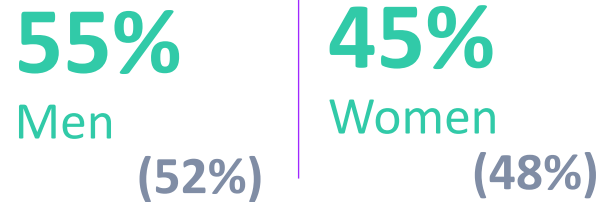
“For myself [advice and support are not] beneficial or useful... It may be of use to others but for me it doesn't do anything to reduce or stop the issue. I think I'd have more of a positive outcome by slowly teaching myself more self-control and willpower.” - Female, 25-34, PGSI 8+

“Financial issues definitely made me re-consider [gambling].” - Male, 35-44, PGSI 3-7

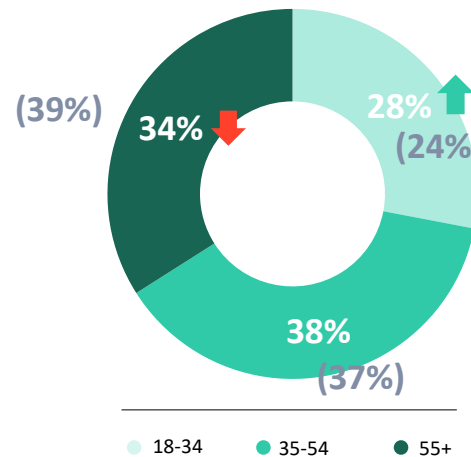
↑ ↓ The numbers in grey represent the figures for people who gamble overall. The arrows indicate where people in this segment are more or less likely to fall into a group (green = higher and red = lower).



GENDER

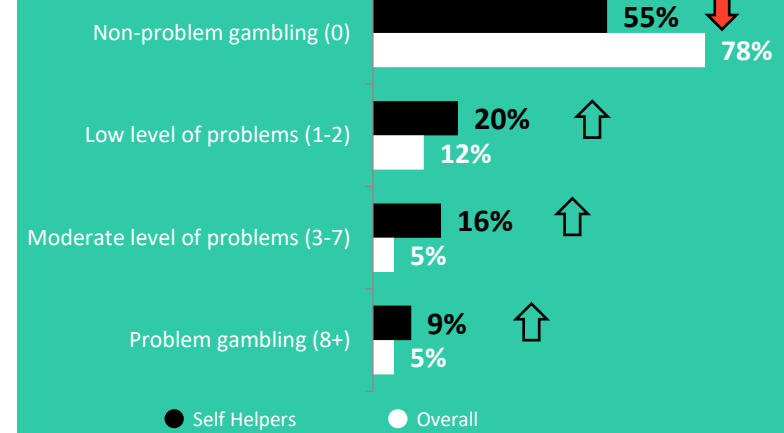


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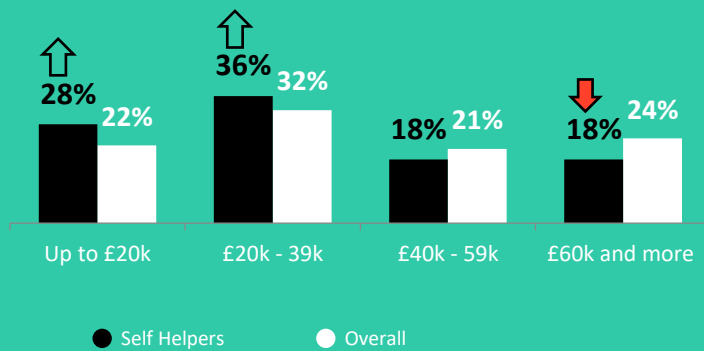


Base size: n=883 'Self Helpers' compared to n=7,028 people who gamble overall

PGSI SCORE

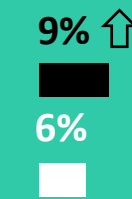


INCOME



ETHNICITY

Ethnic minorities



● Self-Helpers ● Overall

Whilst Self Helpers say they don't currently want advice or support, they have tried various forms previously and see the use in different methods

This highlights the fluidity of attitudes towards gambling advice and support

What have they used before?

It is most common for this segment to have set limits on either the amount of games they are playing, or on the amount of money they are spending on gambling. This is linked to the cost of living, with many recognising the impact of gambling on their finances.

*"Setting limits on websites. Only having a set amount of websites I can use. Transferring my income into a bank account which I don't use online."
- Female, 25-34, PGSI 1-2*

*"Financial realisation, and personal budget setting so that I don't have the funds to gamble freely. The increased cost of living is hitting hard."
- Male, 25-34, PGSI 1-2*

Many also speak about the importance of personal willpower and think this is key to cutting down.

Whilst a range of other methods are mentioned, they tend to vary person to person as opposed to there being consistency across the segment, highlighting how personal people's gambling experiences are. This includes support from family and friends, distraction techniques (inc. those related to OCD) and speaking to professionals.

What would they find helpful?

A number of different forms of advice and support are seen as helpful by this segment, even though they are initially aligned in saying they don't want anything. There is a clear preference for informal support and tools, as opposed to formal support which is seen as too 'serious' for some.

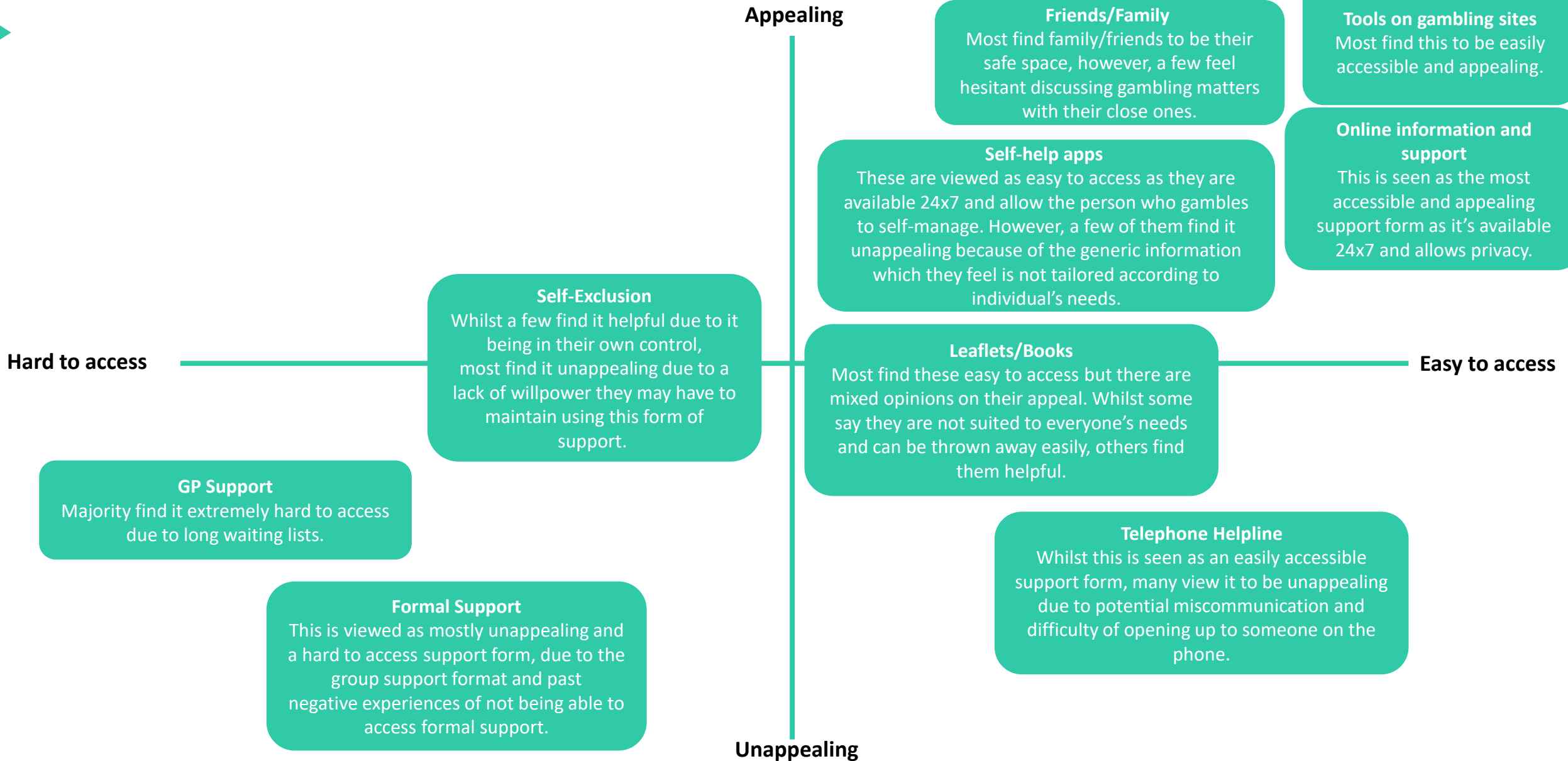
When thinking about informal support, the importance of anonymity comes through.

*"I would feel more comfortable and less worried talking to somebody/receiving tips and hints through the internet"
- Female, 18-24, PGSI 1-2*

There is also a sense that holistic support would be helpful, which takes into account people's individual experiences.

*"...[If] the person listened to all my problems, not just gambling, and then made recommendations based on my lifestyle"
- Male, 35-44, PGSI 3-7*

They express an openness towards informal support and tools, though are less keen on formal support options



Self Helpers have similar perceptions around quitting and reducing to others who gamble, with financial reasons being a key motivator

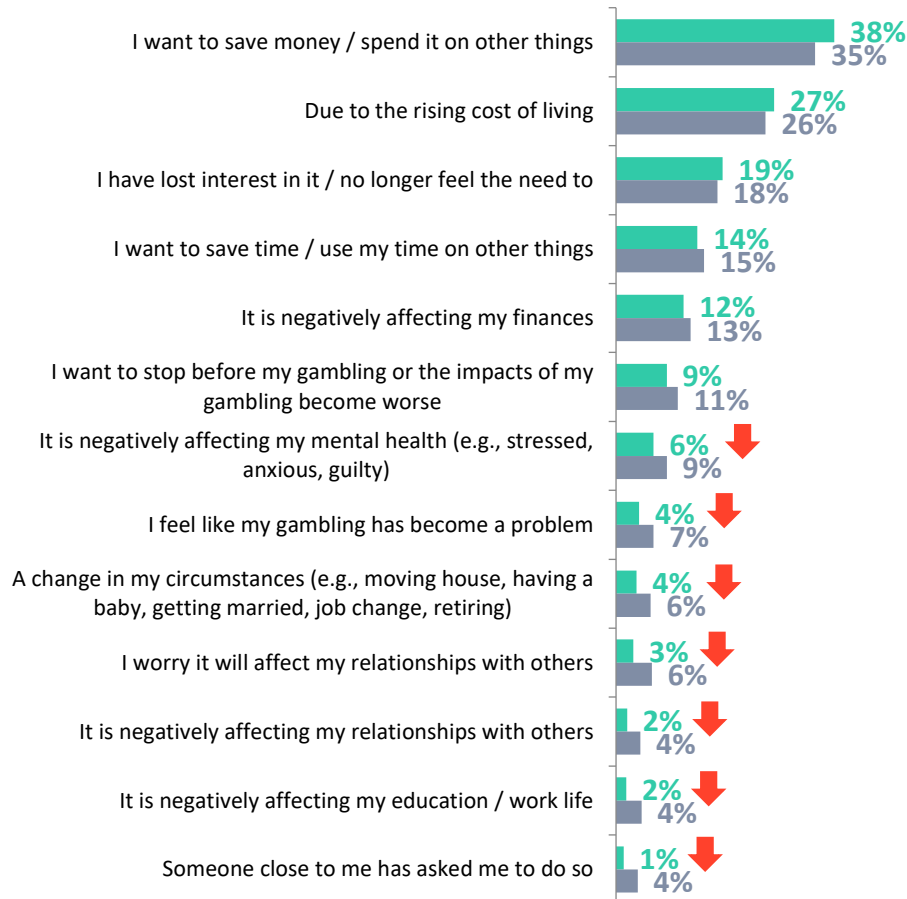


Motivators

Financial reasons are key for motivating this segment to quit or reduce, similar to the average person wanting to make this change.

MOTIVATORS FOR QUITTING OR REDUCING

● Self Helpers ● All who want to quit/reduce



Barriers

They also cite similar barriers to the average, with a range mentioned suggesting there isn't one clear barrier to cutting down.

BARRIERS TO QUITTING OR REDUCING

● Self Helpers ● All who want to quit/reduce



↑ ↓ The numbers in grey represent the figures for people who gamble overall. The arrows indicate where people in this segment are more or less likely to fall into a group (green = higher and red = lower).

Base size: n=883 'Self Helpers' compared to n=1,270 people who gamble and want to quit/reduce. Other and prefer not to say are not shown.

Whilst financial reasons stand out as a shared motivator, barriers vary more on an individual basis

What are their motivators to quit or reduce?

As found in the survey, a range of different motivators are mentioned with financial reasons by far the most common.

Once people reach a point where they recognise the impact of gambling on their finances, it can prompt them to make change, though the prospect of winning big can contradict this at times.

“Seeing how much I spent a month. It felt like I was just throwing money away.”
- Female, 25-34, PGSI 1-2

“I realised I wasn’t going to win big and that my family needed the money”
- Male, 35-44, PGSI 3-7

What are their barriers?

Whilst this segment share a common motivator for quitting and reducing, the barriers tend to vary more on an individual basis.

These include (but are not limited to):

- Gambling adverts

“Adverts for gambling are non-stop”
- Male, 25-34, PGSI 3-7

- Intersecting challenges (mental health)

“...My anxiety and depression. Sometimes I get very impulsive and fixated on certain things and then find it a struggle to stop.” - Female, 25-34, PGSI 8+

- Enjoyment from gambling

“I enjoy watching live sports, therefore it goes hand in hand”
- Male, 35-44, PGSI 3-7

It is common for people to mention a number of barriers, highlighting the role that numerous internal and external factors play in someone continuing to gamble.

Case study: Female, 25-34, PGSI 8+, Self Helpers

Gambling journey and attitudes towards gambling

- She started gambling from a young age with scratch cards and lottery tickets. Currently, she gambles on the National Lottery app as it has a wide variety of instant games. She feels that she is impulsive while gambling and often gambles more than she can afford. Furthermore, there have been several instances where she has regretted spending money right after gambling, as she felt could have instead used the money to pay household bills. M added that she resorts to gambling especially when she is unable to sleep at night.

Attitudes towards gambling advice and support

- She wants to reduce gambling as she often finds herself unable to pay her bills after spending money on gambling. However, she has not resorted to any professional help and mainly focused on using her willpower and self-control. She had tried deleting the gambling apps but ended up downloading them again. She now focuses on being more productive by doing other things, such as organising her house, rather than gambling.
- Her past experiences have meant she hasn't resorted to professionals to seek gambling support (both general support and gambling-related formal support) as she finds them to be judgmental and unbothered by her situation. She added that, if needed, she would seek support from her friends and family, but her preferred method would always be to use her willpower to reduce gambling.

Motivators and barriers to quit or reduce their gambling

- She notes that financial stress is the key motivator for her to quit or reduce gambling as she often struggles to meet her expenses after using the money for gambling. Furthermore, she mentioned that using her time to engage in other activities, such as doing household chores, also motivates her to reduce her gambling.
- She has included that the gambling apps, especially the National Lottery app and Mfortune app, are a significant barrier for her to reduce or quit gambling, as they are easily accessible and can be set up to play in few minutes.

"I also wouldn't go to a GP or choose mental health support. I say this because I have previously tried to seek professional help and I feel like my problems and concerns are not taken seriously, even if they are negatively impacting my day-to-day life."

"I think learning more self-control [would help] ... finding other things to do to keep myself busy and distracted, whether it be around the household, socialising more or fighting impulsive behaviour."

Segment 2 Tool Seekers

Tool Seekers want to quit or reduce, with tools

Who are they?



Audience description

This segment want to quit or reduce their gambling and would like tools to help them do so.



Perceptions of quitting and reducing

They are more likely than the other segments to want to reduce their gambling (78%), as opposed to quit (22%).



Gambling problems

This group tends to be experiencing high levels of problems from their gambling, with an average PGSI score of 10. Four in five (81%) have a PGSI score of 1+.



Demographics

Similar to the other segments wanting to quit or reduce, this segment are more likely to be young men. They are also more likely to be ethnic minorities and tend to be on low incomes.



Gambling Activities

1. National Lottery Tickets – 46% ↓
2. Scratch Cards – 38%
3. Sports Betting – 27%

“Gamstop stops you gambling online completely and Gamblers Anonymous helps as the people you talk to understand how it feels.”

– Male, 35-44, PGSI 8+

“[I would find it helpful if] there were indefinite limits to gambling so it limited you completely.” – Female, 25-34, PGSI 3-7

“[I would find it helpful if] there were more gambling safety tools, with limits that are easy to set.” - Male, 35-44, PGSI 8+

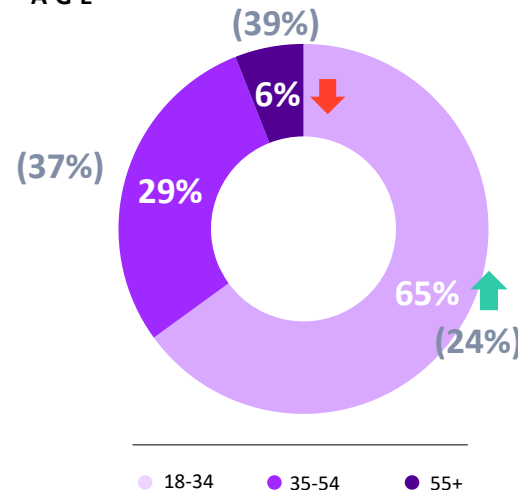
The numbers in grey represent the figures for people who gamble overall. The arrows indicate where people in this segment are more or less likely to fall into a group (green = higher and red = lower).



GENDER

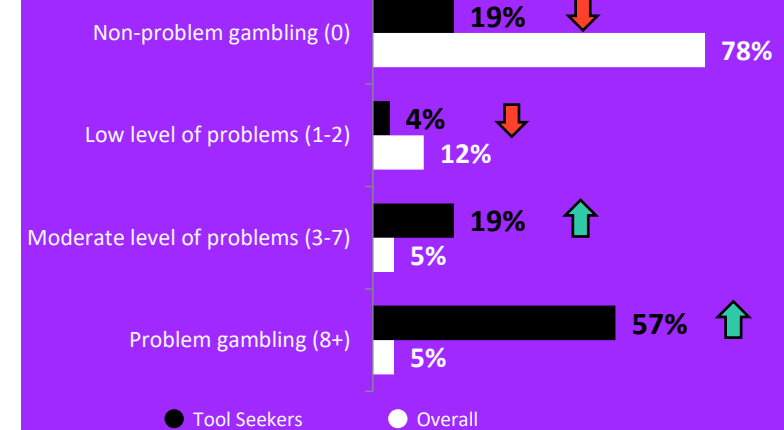


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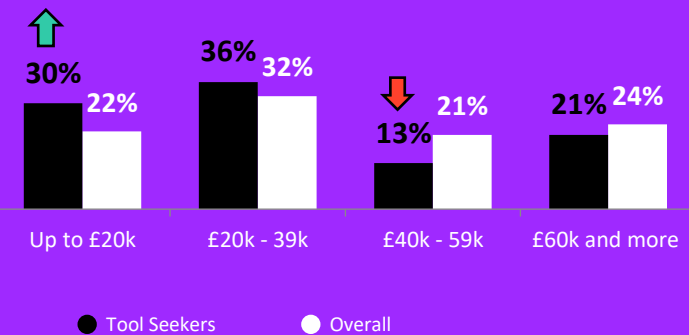


Base size: n=129 'Tool Seekers' compared to n=7,028 people who gamble overall

PGSI SCORE



INCOME



ETHNICITY

Ethnic minorities

25% ↑

6%

● Tool Seekers ● Overall

Tool Seekers have a strong preference for online forms of support that would equip them with tools and practical advice to manage their gambling

What have they used before?

In this segment, most respondents set time-outs, deposit limits or bank card restrictions to help manage their gambling online or avoid going to places where they could gamble altogether. Whilst for many it is an effective way of managing their gambling, others find it less helpful, as they are still able to access certain sites or remove these limits.

“For me a deposit limit is a great tool and prevents me from gambling more than I can afford.” – Male, 34-44, PGSI 8+

“[Bank card restriction] is an easy way to do it, but you can undo it and just wait 48 hours to use your card again.” – Female, 65-74, PGSI 3-7

Only a few use the tools alongside more formal forms of support. Others also turn to their family and friends for advice and support or find ways to fill their time and distract themselves from gambling activities.

“[I] set my mind to something else... making new hobbies such as reading taking on a new passion and business venture helped.” – Female, 18-24, PGSI 3-7

What would they find helpful?

In this segment, most are uncomfortable reaching out for in-person support, due to feelings of embarrassment, and are more open to online support instead, with some preferring support where they can remain anonymous. Most want support that offers practical ways of managing gambling, as there is scepticism that advice alone would be helpful. Effectiveness of tools is also important, as many want to see tools with more rigorous controls and limits in place.

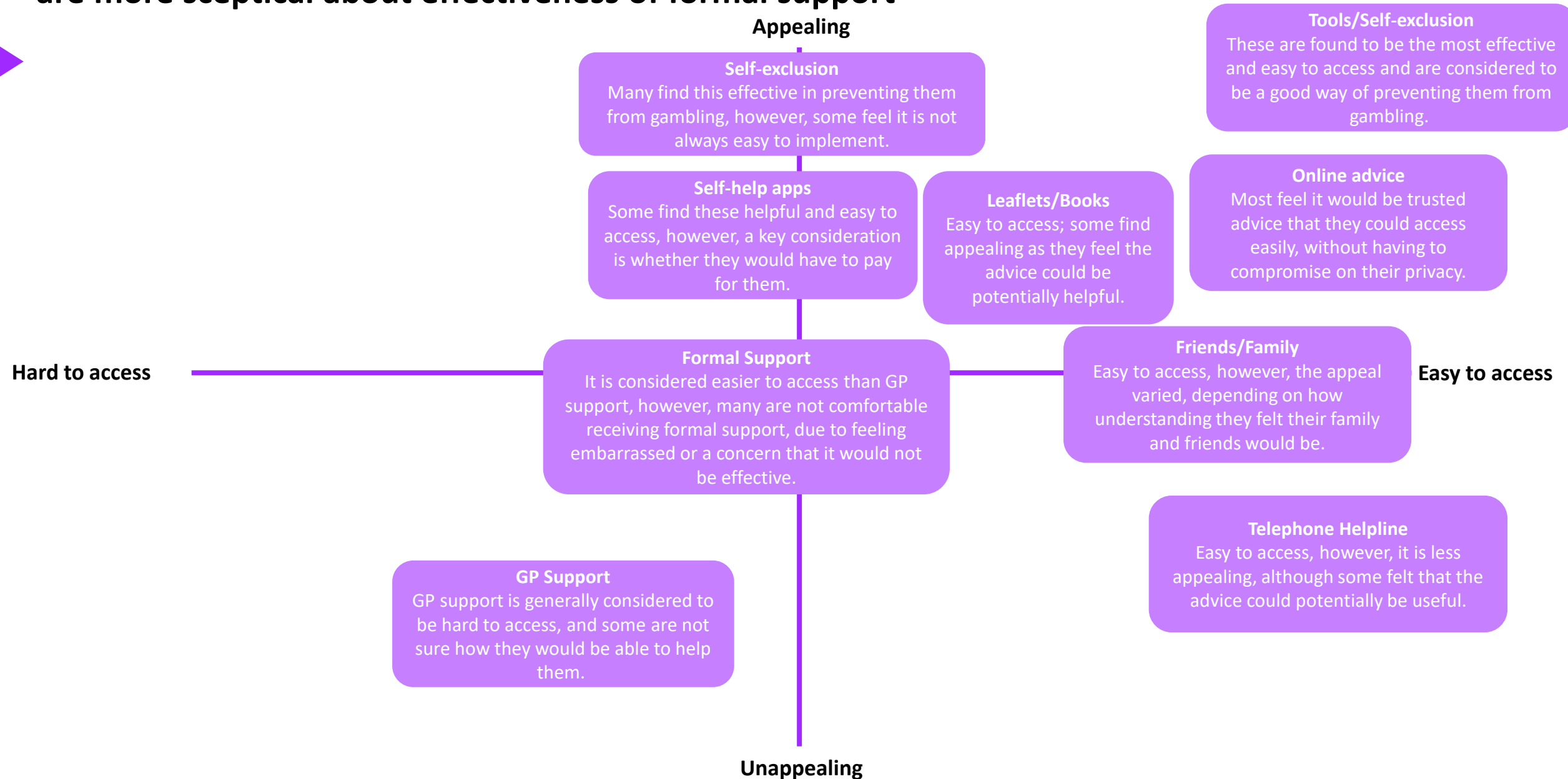
“Tools I prefer as it stops you gambling; advice can only do so much, but it can’t stop you when you get the urge.” – Male, 35-44, PGSI 8+

“More powerful tools could include spending restrictions that can't be altered for a set time period.” – Male, 35-44, PGSI 8+

When seeking advice, the ability to talk to people with the same experiences is particularly important for this segment.

*“You can’t beat personal experience when receiving advice from someone, it means so much more when they’ve been through it themselves.”
– Male, 35-44, PGSI 8+*

This segment find tools, self-exclusion and self-help attractive and practical, as they are more sceptical about effectiveness of formal support



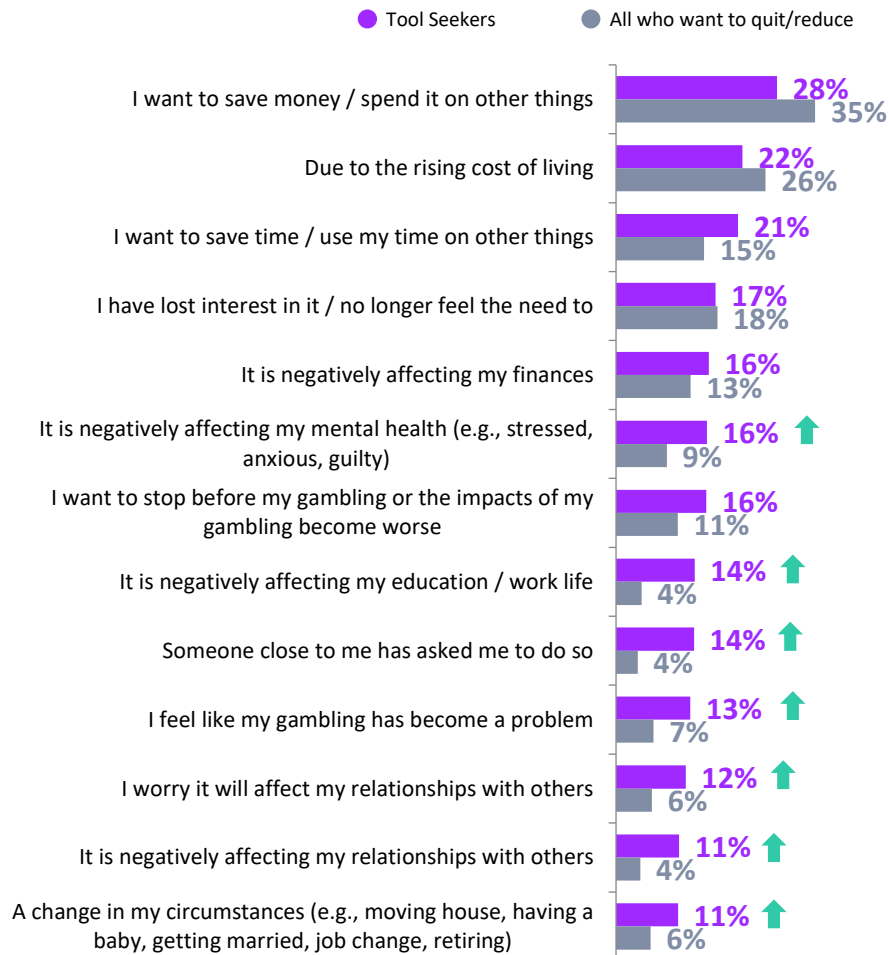
Whilst this segment recognise some of the more severe negative impacts of gambling as motivators, a range of internal and environmental barriers get in the way



Motivators

This segment are more likely than average to cite motivators linked to the more severe negative impacts of gambling (e.g. mental health, relationships), though financial motivators are top.

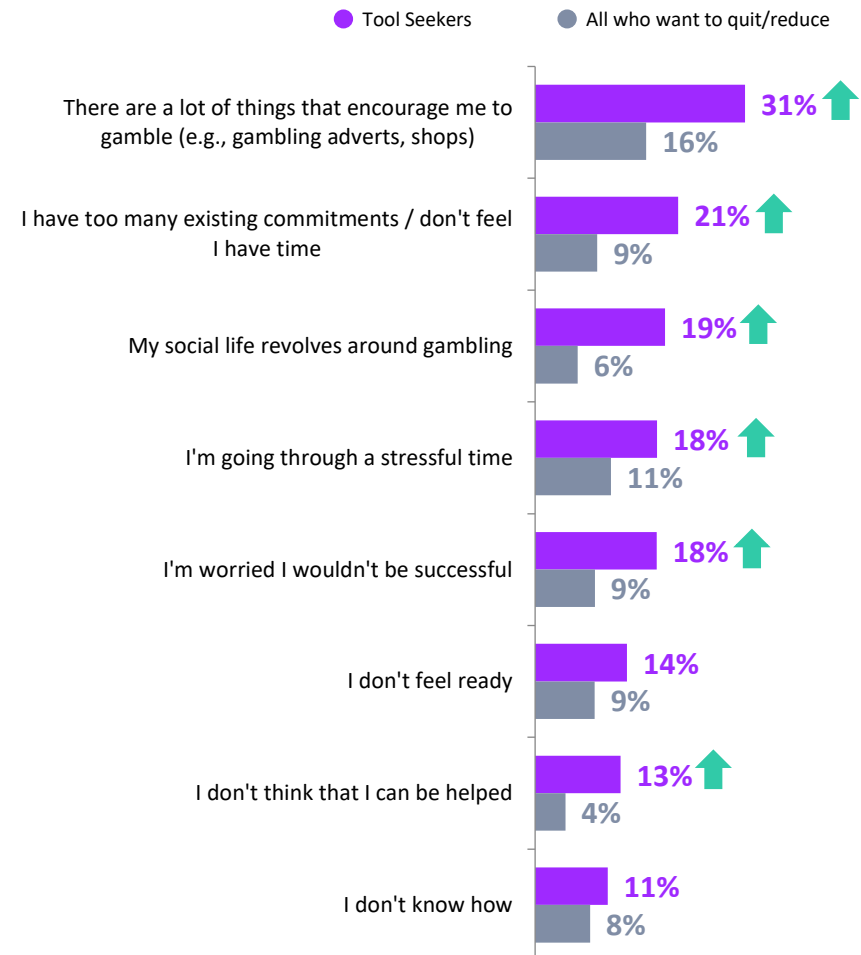
MOTIVATORS FOR QUITTING OR REDUCING



Barriers

Whilst they give a range of motivating factors, there are many barriers to them quitting (inc. external and internal factors). This segment is more likely than average to mention almost all of the barriers listed.

BARRIERS TO QUITTING OR REDUCING



The numbers in grey represent the figures for people who gamble overall. The arrows indicate where people in this segment are more or less likely to fall into a group (green = higher and red = lower).

Base size: n=129 'Tool Seekers' compared to n=1,270 people who gamble and want to quit/reduce
Other and prefer not to say are not shown

Finances and time stand out in the qual as their key motivators to reduce gambling, along with investing their time and money into more productive and enjoyable activities

What are their motivators to quit or reduce?

Finances are a key motivator for this segment to reduce or quit gambling, particularly for those who have financial responsibilities, or who feel impacted by the rising cost of living. Others want to reduce their gambling to gain more time for family, hobbies and interests.

“Raising interest rates mean my bills are more expensive and I need to reduce how much I spend on gambling.” – Male, 35-44, PGSI 3-7

“[Reducing gambling would mean] increased time and money for more productive hobbies and interests.” – Male, 35-44, PGSI 8+

Whilst gambling is often seen as a source of excitement, most had experienced feelings of guilt when their gambling would escalate and when trying to win back what they lost. Usually, spending too much money or realising the extent of the issue are the main factors that prompt them to reduce gambling or seek support.

“The realisation was [that] I was chasing money, and the only winners are the gambling sites.” – Female, 65-74, PGSI 3-7

What are their barriers?

One of the barriers experienced by this segment is having people around them who gamble and it being part of their 'social lives'.

“I play football with a team; on most times after playing a few of my teammates would go for a drink and... we often put a bet on.” – Male, 45-54, PGSI 3-7

For many, a key barrier to reducing is still being able to access gambling sites, bookmakers or purchase scratch cards, even after they have banned themselves from websites or shops.

“Being able to purchase [scratch cards] from places other than the safe places where I had asked people not to sell me the cards.” – Female, 25-34, PGSI 3-7

Others mention that the easy access to online gambling is a barrier to reducing their activity.

“Online gambling – it’s too easy to get onto it.” – Female, 18-24, PGSI 3-7

Case study: Male, 35-44, PGSI 8+, Tool Seekers

Gambling journey and attitudes towards gambling

- He feels that his gambling problem was serious in his 20s (having started at age 14), however, it worsened in his early 30s when he lost his job, close relationships and a house. He later managed to overcome his problem with gambling, and now enjoys doing it in moderation and feels that he rarely loses control.
- At the moment, he mainly bets on football, as he feels he is knowledgeable in this sport, and it enhances his viewing experience and excitement. He controls his gambling by limiting what he spends.

Attitudes towards gambling advice and support

- At the moment, he feels that he is in control of his gambling. However, he recognises that sometimes his gambling can get out of control, which he manages by setting limits on his online accounts, banning himself from bookmakers, as well as only taking a limited amount of money with him when he goes outside. Whilst he finds these tools effective, he mentions that there are too many loopholes, as he is still able to get into some bookmakers outside of the area that he lives in.
- If he felt that he needed additional support, he mentions that he would be open to online support, as well as speaking to those who have previous experiences with gambling addiction, as he feels they would be better equipped to understand his situation and would be less judgemental. However, he finds the current support available sufficient.

Motivators and barriers to quit or reduce their gambling

- Whilst he does not want to quit gambling completely, he wants to reduce playing casino games, which he finds the most addictive. He also notes that he would not want to stop sports betting, as it brings excitement, and he feels he has higher chances of winning, due to being knowledgeable in football.
- The main barrier to reducing gambling for him is having people around who gamble a lot, as well as having lots of bookmakers in the area where he lives.
- In the past, his main motivator to reduce gambling was wanting to get himself back on track with being able to pay for his bills after losing a lot of money. Currently, he feels that the key motivator to reduce gambling would be having less money, as this way he would prevent himself from spending on gambling.

"I have deposit limits set up on my online account and if I need nip to town, I will only take the money I need so I'm not tempted to go into the bookies."

"My gambling is manageable now, but I also recognise that at times I can go a bit crazy with it so for me a deposit limit is a great tool and prevents me from gambling more than I can afford."

Support seeking segments

How to target them

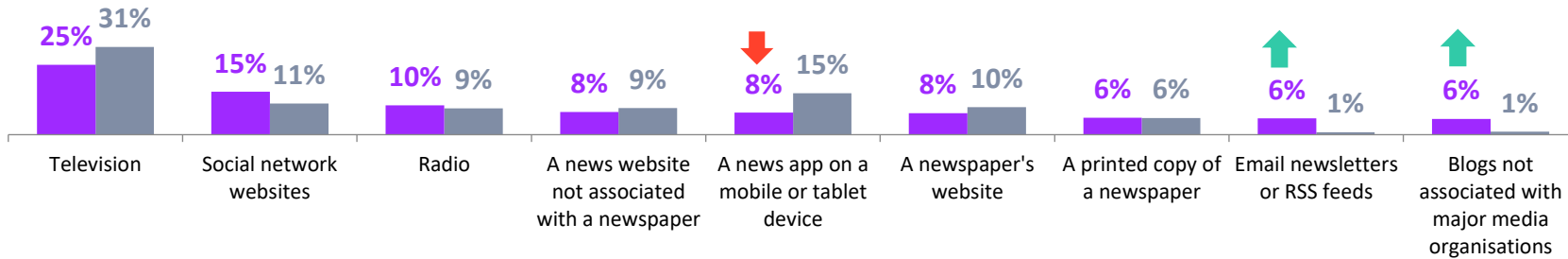


Media usage

These segments (1-4) can be targeted in a similar way to those who gamble. TV, social networks and radio are their main news sources, with online channels and TV key for grabbing their attention.

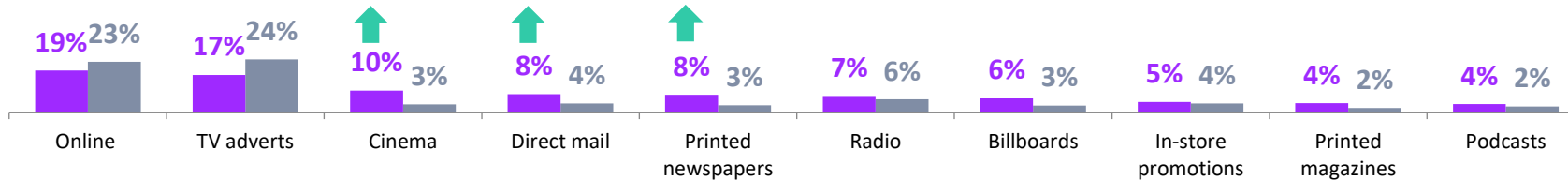
MAIN SOURCE OF NEWS

Support seeking segments Overall



CHANNELS THAT GRAB ATTENTION

Support seeking segments Overall



On the right hand side, the numbers in brackets represent the 3 support seeking segments combined followed by the results among the rest of the sample from YouGov Profiles. The arrows indicate where people in this segment are more or less likely to fall into a group (green = higher and red = lower).

These segments are more likely to say

YouGov

"I often enjoy watching the advertisements on TV" (49% vs. 15%)

"I feel I have too many subscriptions to things (Netflix, Spotify etc.)" (57% vs. 25%)

"I listen to the radio in the background when I am on my own" (72% vs. 54%)

"I primarily listen to music through streaming services" (64% vs. 48%)

"I am often among the first of my friends to try new technology products and services" (55% vs. 22%)

"I wouldn't want people to see my internet browsing history" (72% vs. 54%)

"I spend more time on social media now than I did a year ago" (55% vs. 29%)

Segment 3

Informal Support Seekers

Informal Support Seekers want to quit or reduce, with informal support

Who are they?

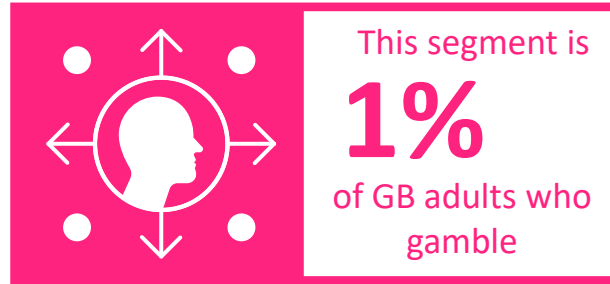
- Audience description**
 This segment want to quit or reduce their gambling and would like informal support to help them do so.
- Perceptions of quitting and reducing**
 They are more likely to want to reduce their gambling (63%), as opposed to quit (37%).
- Gambling problems**
 This group tends to be experiencing a high level of problems from their gambling, with an average PGSI score of 9. Four in five (84%) have a PGSI score of 1+.
- Demographics**
 This segment are more likely to be young men. Additionally, they are more likely to be ethnic minorities and tend to be on low incomes.
- Gambling Activities**
 - National Lottery Tickets – 52% ↓
 - Scratch Cards – 43% ↑
 - Sports Betting – 33%

"I am afraid of letting go and not having an outlet in case I can't control my need to gamble" – Female, 45-54, PGSI 8+

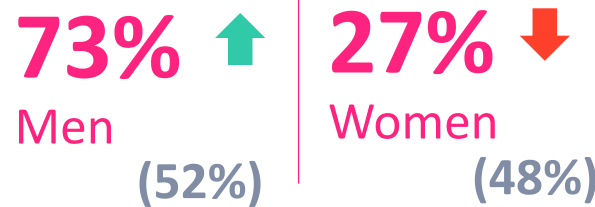
"Because I do not want to involve anyone else - to let anyone else know [in reference to why they prefer informal support]" - Female, 55-64, PGSI 8+

"It is a love and hate relationship with gambling - on one hand the image of a rollercoaster comes to mind as I find it exciting and exhilarating and on the other hand the image of a giant sword hanging over me." Male, 35-44, PGSI 8+

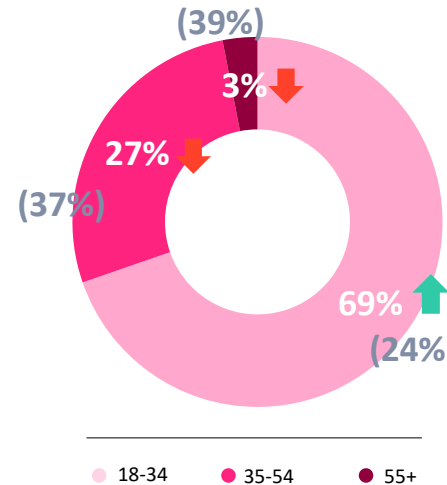
↑ ↓ The numbers in grey represent the figures for people who gamble overall. The arrows indicate where people in this segment are more or less likely to fall into a group (green = higher and red = lower).



GENDER

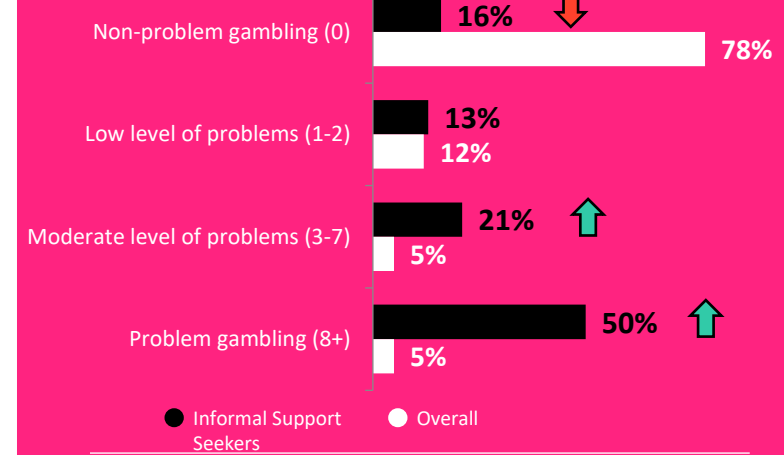


AGE

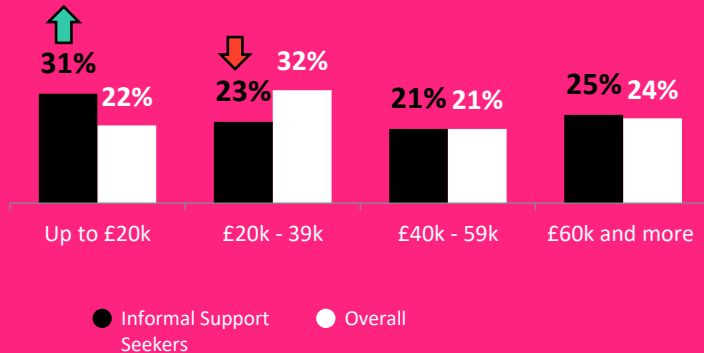


Base size: n=157 'Informal Support Seekers' compared to n=7,028 people who gamble overall

PGSI SCORE



INCOME



ETHNICITY

Ethnic minorities

18% ↑

6%

● Informal Support Seekers ● Overall

Informal Support Seekers wish to keep their support private and fear formal support methods will involve them being exposed, highlighting the need to communicate the flexibility and privacy of support

What have they used before?

This segment experiences feelings of self-loathing which makes them feel embarrassed or shameful to reach out for support. This is compounded by many participants suffering from poor mental health (i.e., social anxiety).

"[I] would feel embarrassed because I'm an adult and aware I've not been making the best adult choices or priorities instead of betting."

- Male, 35-44, PGSI 8+

As a result, they look towards informal methods mainly using their own self-will (including tools for many) and if they are including others in support, they rely on personal connections (i.e., family) as they feel comfortable opening up to them rather than strangers they may be judged by.

"Although the verbal and emotional support I get from my family is most helpful I recognised that they couldn't be there all the time to stop me."

- Female, 25-34, PGSI 8+

What would they find helpful?

They want support that they feel is not intrusive in their lives. Firstly, so they can keep it private but also so they can opt-out.

"I think that I would use advice and support so more of an informal route where I could access information when I want it and not have to talk to professionals if I wasn't ready – I think this would be the right level for me."

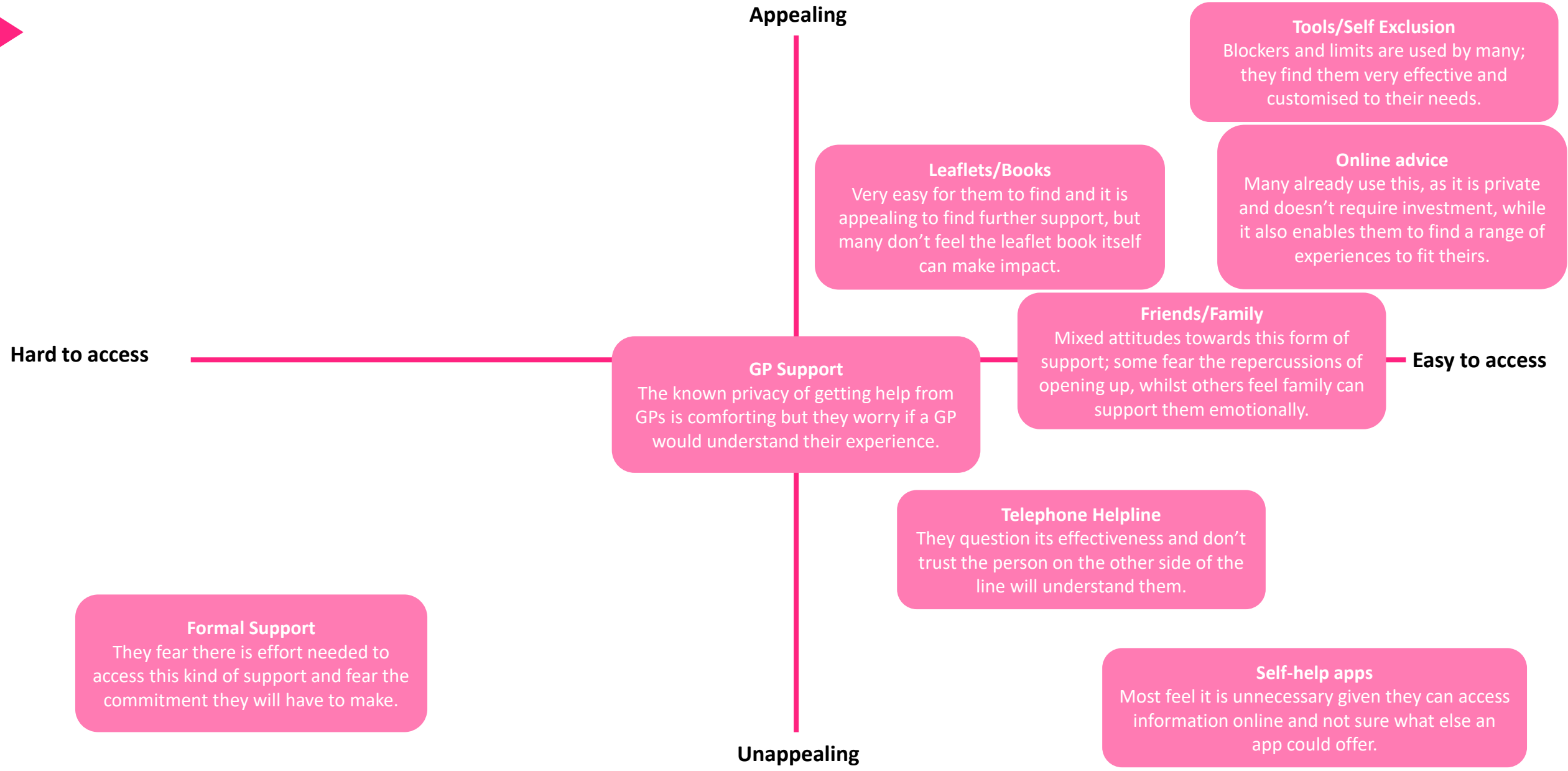
- Female, 35-44, PGSI 8+

However, some concede that doing it alone may not be enough or if they wanted to quit outright. There is a feeling by some that formal support like counselling may be more effective than going it alone.

"Formal support – I'd consider to stop completely if needed."

- Male, 35-44, PGSI 8+

For this segment, the access to tools, online advice as well as friends and family are valuable, due to their need for privacy and more tailored support



Appealing

Unappealing

Hard to access

Easy to access

GP Support

The known privacy of getting help from GPs is comforting but they worry if a GP would understand their experience.

Formal Support

They fear there is effort needed to access this kind of support and fear the commitment they will have to make.

Leaflets/Books

Very easy for them to find and it is appealing to find further support, but many don't feel the leaflet book itself can make impact.

Tools/Self Exclusion

Blockers and limits are used by many; they find them very effective and customised to their needs.

Online advice

Many already use this, as it is private and doesn't require investment, while it also enables them to find a range of experiences to fit theirs.

Friends/Family

Mixed attitudes towards this form of support; some fear the repercussions of opening up, whilst others feel family can support them emotionally.

Telephone Helpline

They question its effectiveness and don't trust the person on the other side of the line will understand them.

Self-help apps

Most feel it is unnecessary given they can access information online and not sure what else an app could offer.

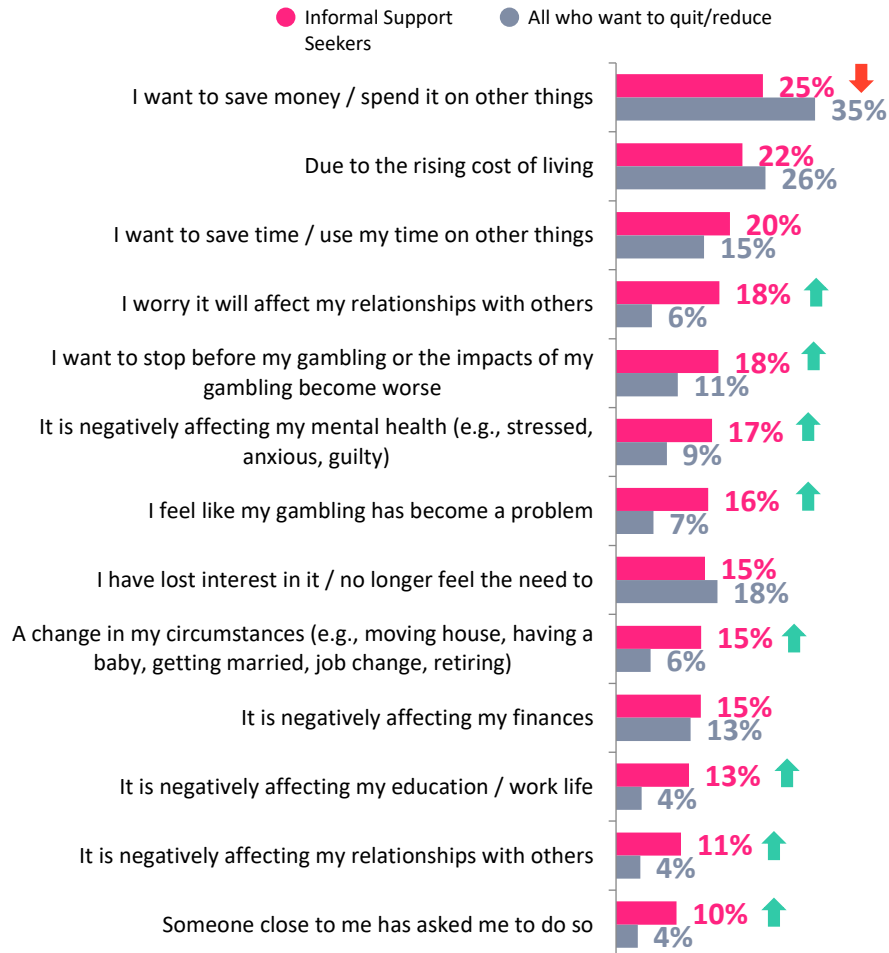
This segment experience similar barriers to the other support seeking segments, including gambling adverts and concerns they won't be successful YouGov



Motivators

This segment are also more likely than average to cite motivators linked to more severe negative impacts of gambling (e.g. mental health and relationships), with financial motivators top.

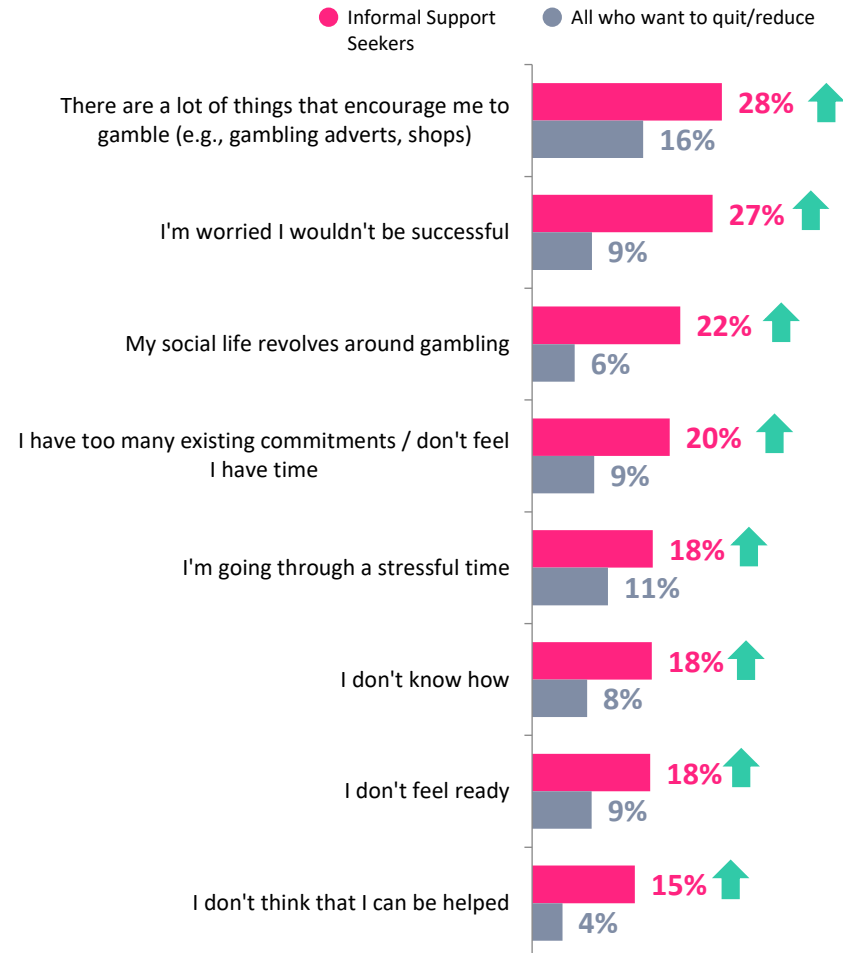
MOTIVATORS FOR QUITTING OR REDUCING



Barriers

Whilst they give a range of motivating factors, there are many barriers to them quitting (inc. external and internal factors). This segment is more likely than average to mention all of the barriers listed with a high proportion worrying they won't be successful.

BARRIERS TO QUITTING OR REDUCING



↑ ↓ The numbers in grey represent the figures for people who gamble overall. The arrows indicate where people in this segment are more or less likely to fall into a group (green = higher and red = lower).

Base size: n=157 'Informal Support Seekers' compared to n=1,270 people who gamble and want to quit/reduce Other and prefer not to say are not shown

Already taking the burden on themselves to quit, constant triggers cause relapse which makes them feel worse and retreat from reaching out for support

This highlights that repeated failures make the prospect of reaching out harder

What are their motivators to quit or reduce?

As seen in the quant, having more money to spend on other things and the impacts on relationships are the core motivators. We have seen in the qual that both go hand in hand, they don't want their financial losses to impact their family.

"To clear debt and to hopefully start a family before it's too late."

- Male, 35-44, PGSI 8+

Reaching a crisis point (mental, financial, relationships and social) is often the catalyst which makes them seek support.

"My parents died and I escalated my gambling. It had to stop as I was financially ruined. Why was this important that you changed your gambling at this point? I would have committed suicide if not. I could no longer live with the feelings of guilt."

- Female, 45-54, PGSI 8+

What are their barriers?

Constant advertising creates an ever-present barrier for most, which erodes at their own willpower, which can result in relapse.

Some of the participants had health conditions (e.g., OCD, ADHD) which makes the prospect of quitting disconcerting and difficult.

"I suffer from obsessive compulsive disorder, and this makes me obsess about things including gambling which has made it much harder to stop."

- Male, 35-44, PGSI 3-7

The journey has not been simple for a large proportion of the participants, hitting crisis points and relapsing has created strong emotions of disgust and self-loathing making them fear of failing again and going through the same emotional turmoil.

"Restarting made me feel weak with a lack of control and willpower as well as lost, toxic and ashamed."

- Female, 25-34, PGSI 8+

Case study: Male, 35-44, PGSI 3-7, Informal Support Seekers

Gambling journey and attitudes towards gambling

- Following the loss of his job, which resulted in a mental breakdown, he started gambling to make money and fill the time left by his job loss. He partakes in a range of gambling activities; betting on football and horse racing, bingo, going to the casino and using online slot machines. He has a love/hate relationship with gambling, both finding it exhilarating and it bringing about feelings of embarrassment and anxiety.
- He has tried to quit several times when it has affected him financially, nearly losing all his savings. However, his OCD (Obsessive Compulsive Disorder) makes the urge hard to overcome, accompanied by feeling of loneliness and boredom which gambling helps him cope with, leading him to restart. This cycle creates negative feelings of worthlessness which get worse each time.

Attitudes towards gambling advice and support

- He wants to reduce or quit but generally struggles with communicating with strangers, which is made worse by his feelings of embarrassment around his gambling. Therefore, he avoids formal support where he would have to talk to a professional or in a group. For these reasons he prefers to search for sources of support online for tips on how to quit and looking at forums of other experiences.
- Outside of online resources he feels comfortable relying on his family for support and engaging in different activities/interests (i.e. watching films) to keep his mind occupied. His preference (if he was going to look for formal support) would be to communicate with a professional via email as this feels low risk (as its more anonymous) to him and less of a commitment. From there he could build to a Skype group but still with no commitment to show your face or speak.

Motivators and barriers to quit or reduce their gambling

- He wants to quit as he has realised how much of his savings was depleted and wanted to help his parents out more financially. Second to this is trying to improve his mental health and removing the anxiety and depression that comes with his gambling.
- His OCD is one of his core barriers to quitting. Mainly his poor mental health suffering from anxiety and depression act as a barrier as he seeks comfort in gambling. This then has a negative effect on his motivation to seek support as he feels more embarrassed to reach out. Unfortunate life-events (family members being hospitalised) have also been triggering and seen him restart gambling as a coping mechanism.

"To me the main difference between support is how intrusive and embarrassing/difficult to access they are. Informal support is instantly available and there at the touch of a button unlike the formal support whereby you have to get appointments and face to face meetings etc."

"I have felt dirty and depressed and anxious. Feeling such a let down and hating myself for falling back into the routine where I'm wasting money again. Feeling like there are black clouds over me whereas before I could see the light."



Segment 4 Formal Support Seekers

Formal Support Seekers want to quit or reduce, with formal support

Who are they?

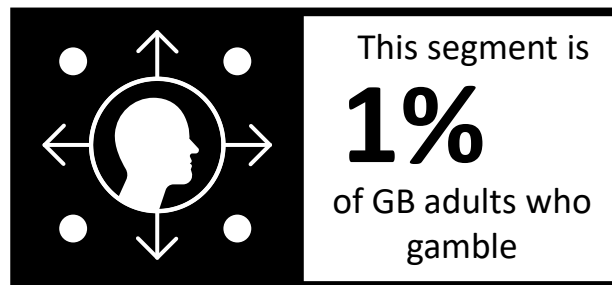
- Audience description**
 This segment want to quit or reduce their gambling and would like formal support to help them do so.
- Perceptions of quitting and reducing**
 They are the only segment more likely to want to quit gambling (55%) than reduce their gambling (45%). A majority in this segment have attempted to quit or reduce their gambling in the last 6 months.
- Gambling problems**
 This group tends to experience a high level of problems from gambling with an average PGSI score of 9. Four in five (80%) have a PGSI score of 1+.
- Demographics**
 As with the other support seeking segments, this segment tends to be young men. They also tend to be on lower incomes.
- Gambling Activities**
 - National Lottery Tickets – 74%
 - Scratch Cards – 35%
 - Sports Betting – 26%

“I am running out of options. I don’t want to commit suicide, but I feel I have no other option.”
 – Male, 45-54, PGSI 8+

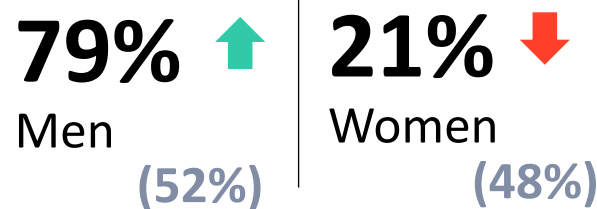
“[Talking about gambling makes me] see that I have a problem, so I feel sad about the mess I have gotten myself into”
 – Female, 25-34, PGSI 3-7

“I have lost a lot to gambling and now recognise it as a bad habit.”
 - Male, 25-34, PGSI 8+

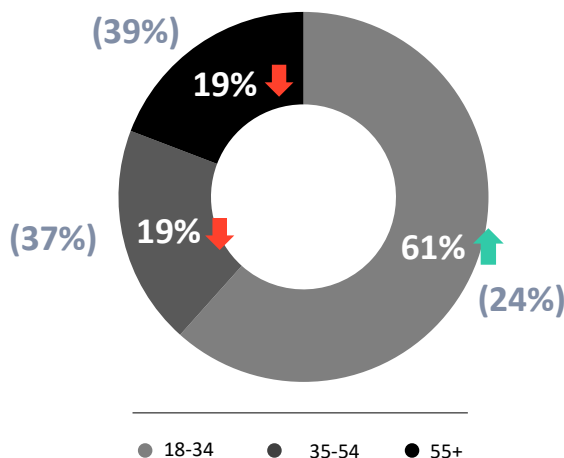
The numbers in grey represent the figures for people who gamble overall. The arrows indicate where people in this segment are more or less likely to fall into a group (green = higher and red = lower).



GENDER

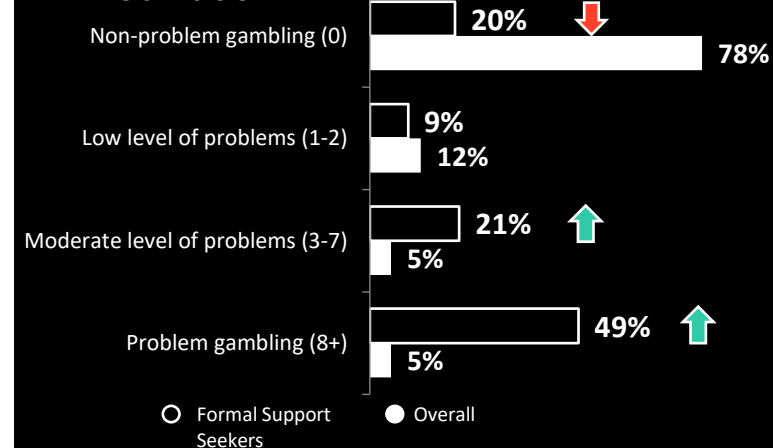


AGE

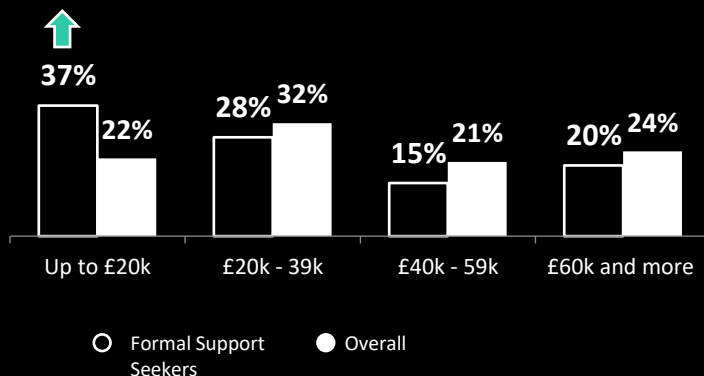


Base size: n=101 'Formal Support Seekers' compared to n=7,028 people who gamble overall

PGSI SCORE



INCOME



ETHNICITY

Ethnic minorities

17% ↑

6%

○ Formal Support Seekers ● Overall

Formal Support Seekers are drawn to formal support because they feel they have exhausted many of their other options

What have they used before?

To help with reducing their gambling, many Formal Support Seekers have used self-directed methods to keep them occupied, such as exercise, video games, and advice seeking from friends and family. Some have utilised blockers and self-exclusion tools to keep them from accessing websites.

“The main advice [I received] was to keep myself occupied or busy at all times, be it I spend time doing my hobbies or I find a new hobby.” - Male, 25-34, PGSI 8+

These tools have had mixed effectiveness with this segment, as they did not always address their urge to gamble. They want to find a method that eliminates this urge and helps them stop gambling completely. This highlights the importance of nudging people along the journey when accessing tools.

***“I really haven’t found anything beneficial. I have been gambling for thirty years constantly and I feel I can now never stop.”
Male, 45-54, PGSI 8+***

What would they find helpful?

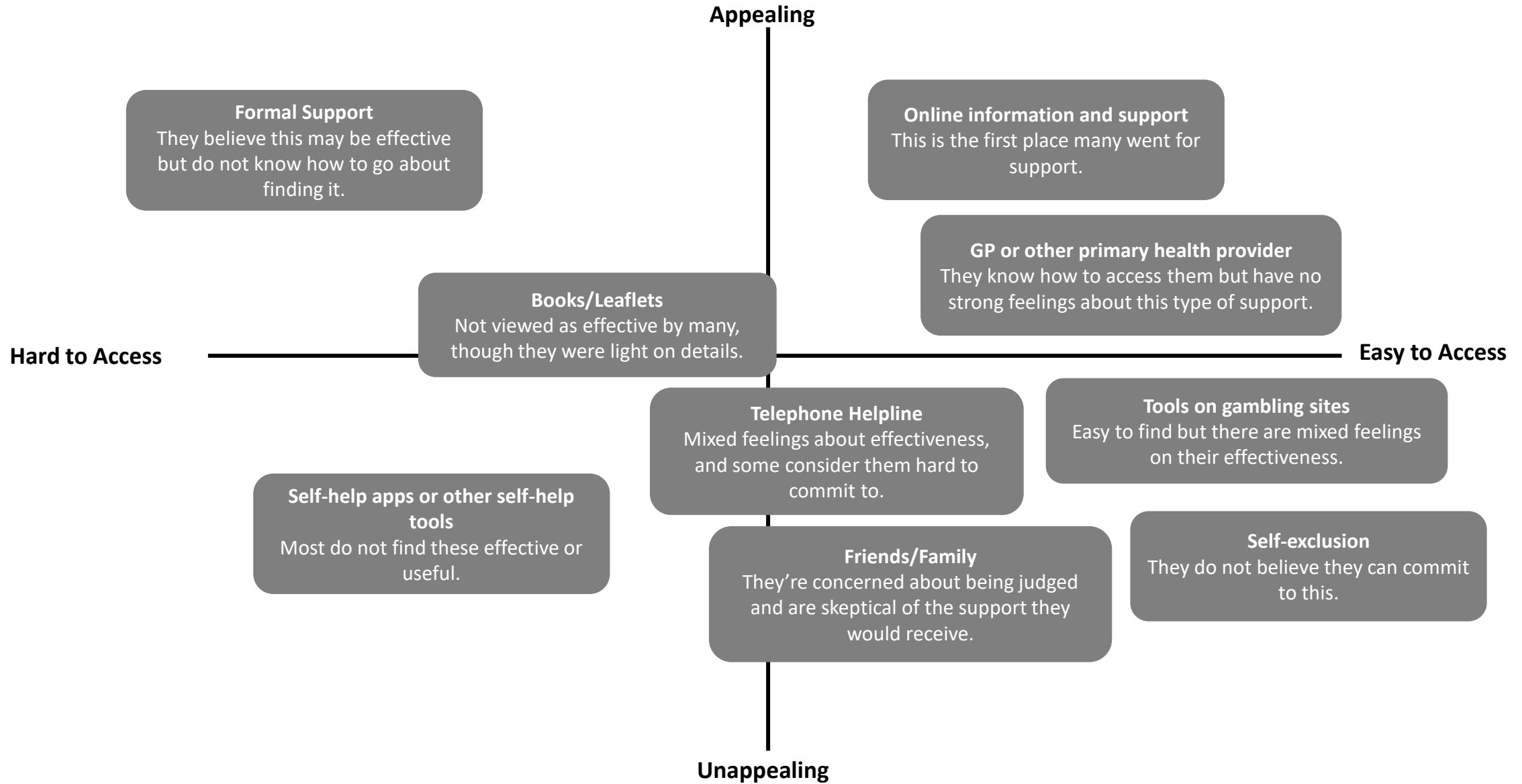
Formal Support Seekers would like structured support from professionals (as the name suggests). They feel like self-directed/initiated forms of support have not been helpful and want guidance from an expert, though some feel that reaching out for help marks them as an irresponsible adult.

“Asking for help seems daft as adults should be able to sort things out for themselves.” – Female, 35-44, PGSI 7

They are worried about feeling embarrassed in a formal support setting and would prefer anonymous one to one support. They’re looking for long-term support from people who will help them keep up with their commitment to reduce or quit their gambling. Most are unsure as to what that would look like, and do not know where to start looking for it.

“I don’t need to open up to another person where I could feel judged.” – Female, 25-34, PGSI 8+

Whilst more formal forms of support appeal to this segment, some worry that these would be more difficult to find or access



As with the other support seeking segment, a range of barriers stand in the way of cutting down on their gambling, including their current lifestyle



Motivators

This segment are more likely than average to be motivated by the impact of gambling on their life (e.g. relationships with others, work or education) with financial motivators being most commonly selected.

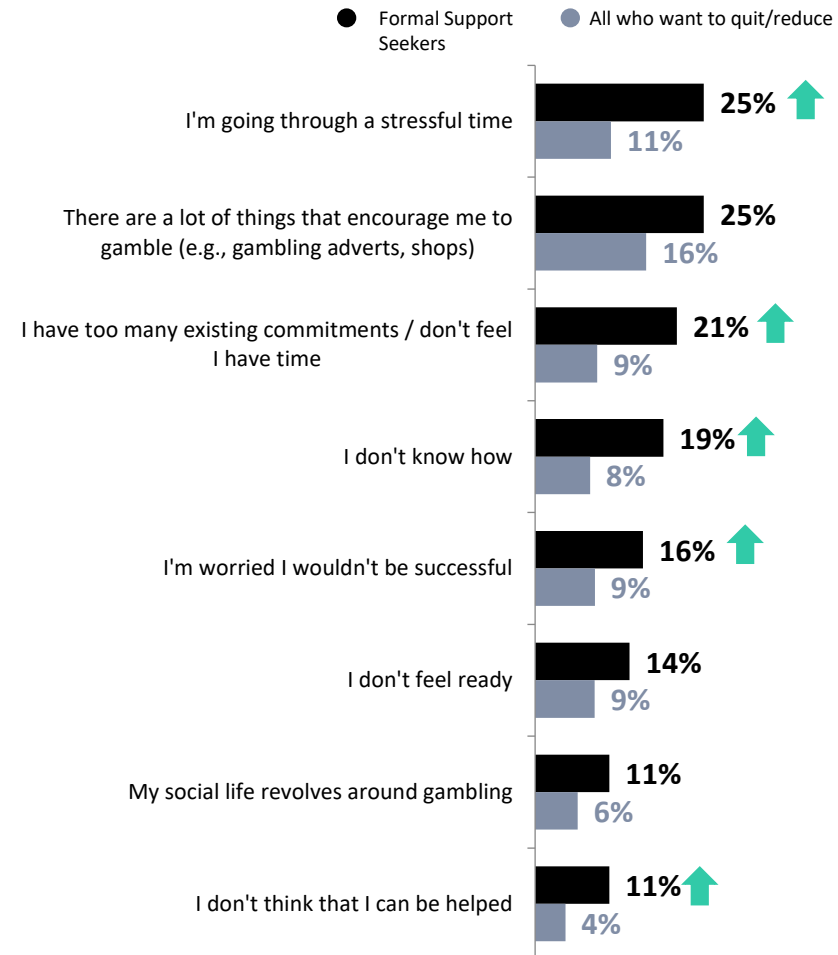
MOTIVATORS FOR QUITTING OR REDUCING



Barriers

Whilst this segment cite the impacts of gambling on their life as motivators, their lifestyle is also seen as a big barrier (e.g. lack of time, a stressful time in life) along with concerns they wouldn't be successful.

BARRIERS TO QUITTING OR REDUCING



↑ ↓ The numbers in grey represent the figures for people who gamble overall. The arrows indicate where people in this segment are more or less likely to fall into a group (green = higher and red = lower).

Base size: n=101 'Formal Support Seekers' compared to n=1,270 people who gamble and want to quit/reduce. Other and prefer not to say are not shown.

Most Formal Support Seekers experienced an event that made them realise they should reduce or stop their gambling but struggled to find effective support

Motivations for seeking support

Most seek out support after a major financial scare brought on by their gambling. Events such as lacking money meant for tuition, petrol, utilities, or to pay for an emergency force self-reflection that made them acutely aware of how much they lose on gambling.

“I had a huge [gambling] loss, and a bereavement. I promised myself I would cut down [my gambling] then.” – Female, 25-34, PGSI 8+

They can envision a better financial future if they can stop or reduce their gambling. They have financial goals and milestones they wish to meet that a reduction in gambling would help them attain.

“I spent my bus fare home once [on gambling] and did not want to experience that again.” – Female, 25-34, PGSI 8+

Barriers to seeking support

Many do not feel supported by their friends and family. Some have been told that they should “just stop,” or are afraid of being judged by others. Feeling isolated and misunderstood prevents them from seeking guidance or support from family members.

***“Nobody I know of has ever tried to help me because they don’t gamble and tell me to ‘just stop doing it.’ As if it is that XXX easy.”
– Male, 45-54, PGSI 8+***

Most have tried multiple forms of support, with limited success. They are frustrated with the programmes and methods they’ve used thus far (including self-exclusion, calling support lines, looking up methods online, and more) due to their lack of effectiveness. They do not know where to seek out more formal support, what they want it to look like, and some doubt that effective support exists at all.

Case study: Male, 45-54, PGSI 8+, Formal Support Seekers

Gambling journey and attitudes towards gambling

- He started gambling at the age of 16 with his brothers in a pub, which then led to him to feel he had developed an addiction. He mostly gambles on slot machines, which he finds particularly addictive, and whilst he also does football betting, he feels he can control it better.
- In general, he associates gambling with depression, an empty bank account and negative thoughts, as he struggles to overcome his addiction and stop himself from gambling.

Attitudes towards gambling advice and support

- He has tried banning himself from gambling websites and reducing his use of cash, which he found helpful; however, it was not sufficient to stop him gambling completely. The main reason for trying self-exclusion was feeling that his gambling was getting out of control.
- Whilst he is open to reaching out for formal support, he finds it too embarrassing and feels that he would not be able to share his thoughts with others. So far, he has not found appropriate support, and he is also generally hesitant when it comes to seeking support, as he is not sure how effective it would be.

Motivators and barriers to quit or reduce their gambling

- He feels that his addiction is the main barrier that prevents him from stopping gambling. He also finds slot machines very addictive and struggles to prevent himself from using them.
- He mentions that he would like to stop gambling in order to have more money, to be able to travel and utilise his time to start writing. He also shares that due to overspending on gambling he no longer has enough money, leading to situations where he has been unable to buy fuel for his car. This prompted him to consider to try and reduce gambling.

"I would prefer the formal support but that would be embarrassing and humbling."

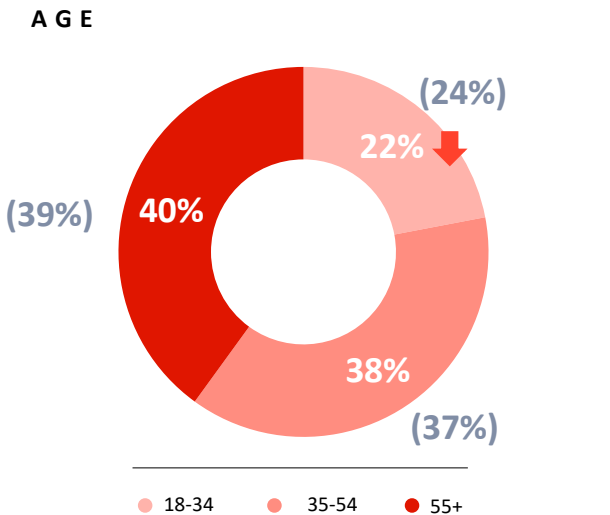
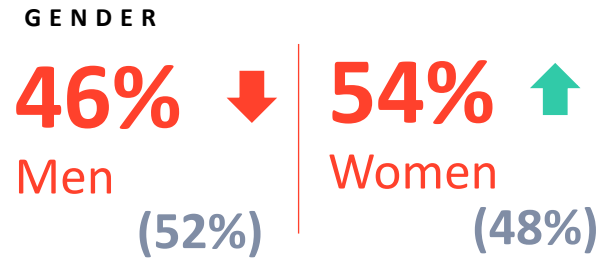
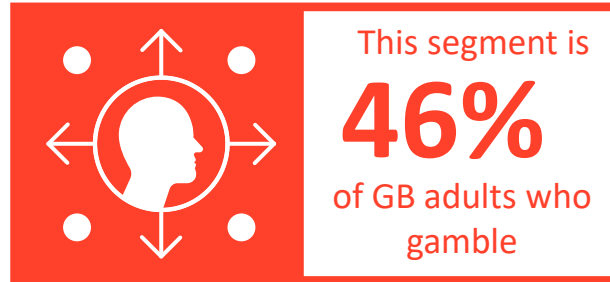
"I really haven't found anything beneficial [in terms of support]. I have been gambling for over thirty years constantly and I feel I can now never stop."

▶ **Segment 5**
Non-Seekers (Low
Level)

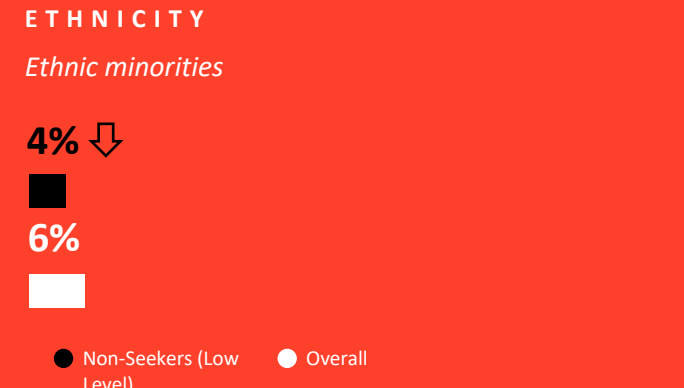
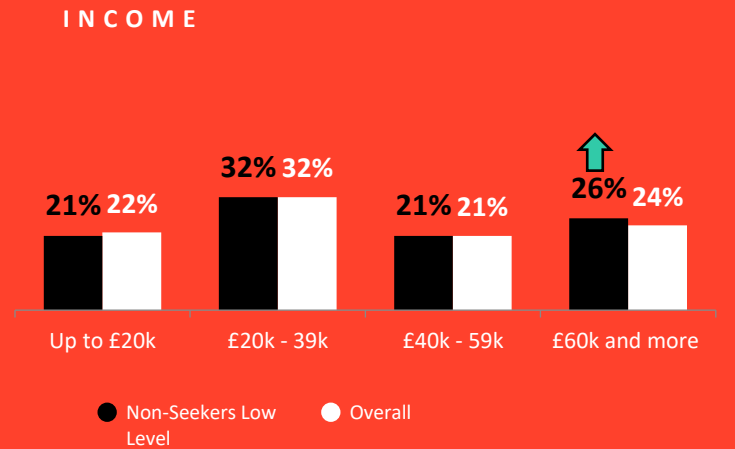
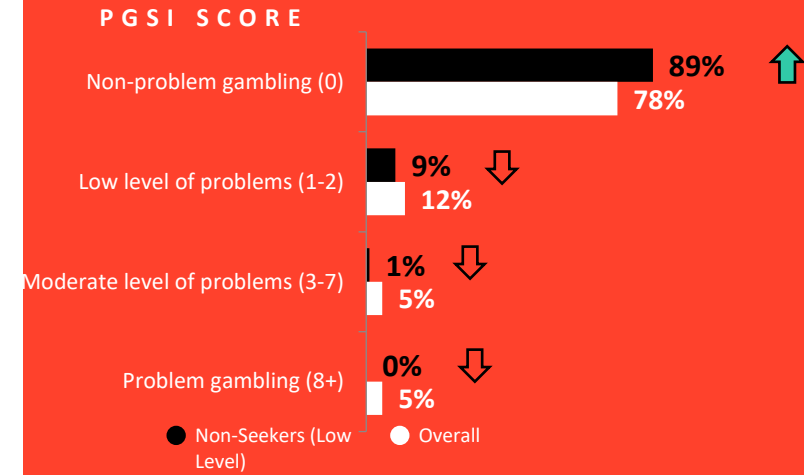
Non-Seekers (Low Level) have low PGSI scores and don't think they gamble enough to warrant change

Who are they?

- Audience description**
 This segment do not want to quit or reduce their gambling because they do not think they gamble that much.
- Perceptions of quitting and reducing**
 The vast majority of this segment want to continue gambling at their current level (97%), only a small minority (3%) report wanting to gamble more.
- Gambling problems**
 This group tends to experience low (or no) levels of problems with an average PGSI score of 0. One in ten (11%) in this segment have a PGSI score of 1+.
- Demographics**
 This is the only segment with a female majority (54%). In comparison to the segments who wish to quit or reduce, this segment has an older age profile and are on higher incomes.
- Gambling Activities**
 - National Lottery Tickets – 76% ↑
 - Scratch Cards – 29%
 - Sports Betting – 27% ↓



Base size: n=2,989 'Non-Seekers (Low Level)' compared to n=7,028 people who gamble overall



The numbers in grey represent the figures for people who gamble overall. The arrows indicate where people in this segment are more or less likely to fall into a group (green = higher and red = lower).

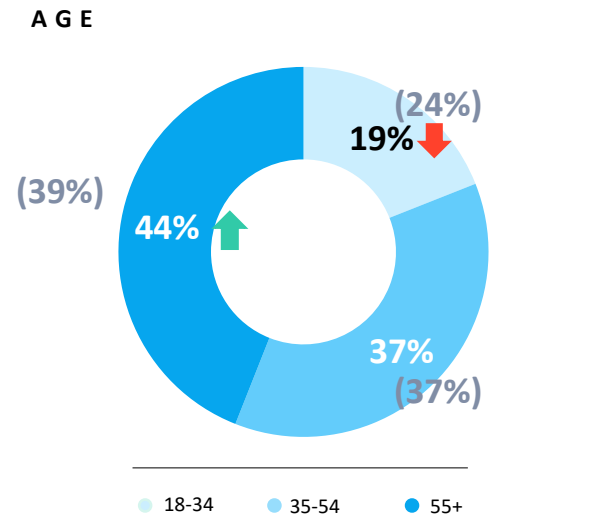
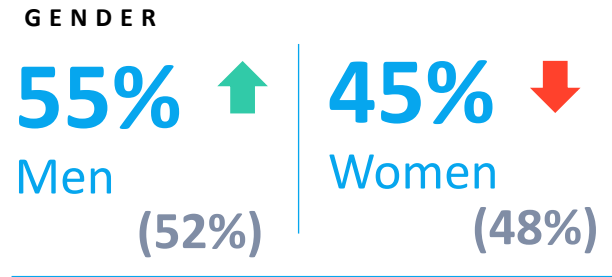
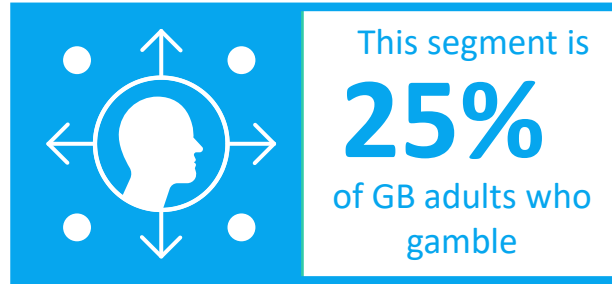
▶ **Segment 6**

Non-Seekers (Leisure)

For Non-Seekers (Leisure), their reluctance to cut down comes from finding gambling fun and not feeling like they're experiencing any consequences

Who are they?

- Audience description**
 This segment do not want to quit or reduce their gambling because they find it fun or do not report experiencing any negative consequences from their gambling.
- Perceptions of quitting and reducing**
 They are more likely than average to want to gamble more in the future (5%) or continue their current gambling frequency (95%). Note the proportion saying more is still relatively low.
- Gambling problems**
 This group tends to experience low (or no) levels of problems from their gambling, with an average PGSI score of 1. One in five (19%) have a PGSI score of 1+.
- Demographics**
 This segment tend to be men from slightly older age groups, though have a relatively similar demographic profile to people who gamble overall. This differs from most of the other segments where people who gamble are skewed to younger people.
- Gambling Activities**
 - National Lottery Tickets – 76% ↑
 - Sports Betting – 38% ↑
 - Scratch Cards – 30%



Base size: n=1,717 'Non-Seekers (Leisure)' compared to n=7,028 people who gamble overall

PGSI SCORE

Non-problem gambling (0)	81%	78%	↑
Low level of problems (1-2)	14%	12%	↑
Moderate level of problems (3-7)	4%	5%	
Problem gambling (8+)	2%	5%	↓

● Non-Seekers (Leisure) ● Overall

INCOME

Up to £20k	18% ↓	22%
£20k - 39k	33%	32%
£40k - 59k	24% ↑	21%
£60k and more	25%	24%

● Non-Seekers (Leisure) ● Overall

ETHNICITY

Ethnic minorities

Non-Seekers (Leisure)	5%
Overall	6%

● Non-Seekers (Leisure) ● Overall

↑ ↓ The numbers in grey represent the figures for people who gamble overall. The arrows indicate where people in this segment are more or less likely to fall into a group (green = higher and red = lower).

Non-Seekers (Leisure and Low Level)

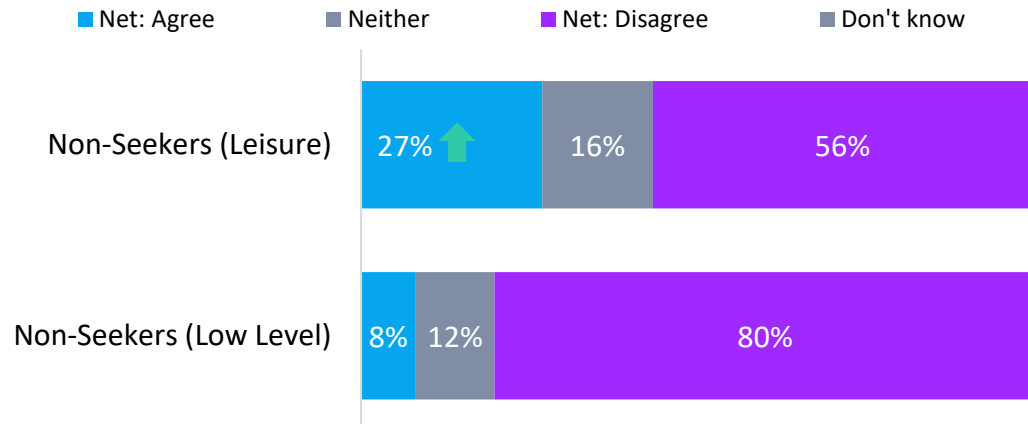


Perceptions of their gambling

Aligned with their defining characteristics, Non-Seekers (Low Level) are less likely than others who gamble to consider themselves someone who gambles. Whilst Non-Seekers (Leisure) are slightly more likely to consider themselves someone who gambles. However, the vast majority in both segments say they do not struggle to control their gambling.

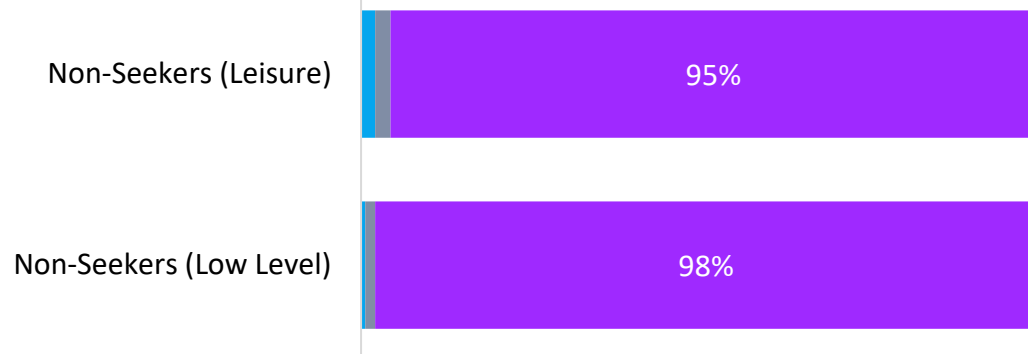
“I CONSIDER MYSELF TO BE SOMEONE THAT GAMBLES”

All people who gamble net agree: 18%



“I STRUGGLE TO STAY IN CONTROL OF MY GAMBLING”

All people who gamble net agree: 4%



Potential motivators and barriers

These segments have similar views to the overall population of those that gamble. They typically do not spend more than they should on gambling and aren't motivated by TV ads, unlike the support seeking segments. However, half think there are too many opportunities to gamble, suggesting they may be supportive of stronger restrictions on gambling.

“I PROBABLY SPEND MORE MONEY GAMBLING THAN I SHOULD”



“I GET THE URGE TO GAMBLE AFTER SEEING A RELEVANT ADVERT ON TV”



“THERE ARE TOO MANY OPPORTUNITIES TO GAMBLE”



Segment 7 Non-Seekers (Reluctant)

Non-Seekers (Reluctant) give multiple reasons for not wanting to reduce their gambling

Who are they?



Audience description

This segment do not want to change their gambling frequency, giving multiple reasons (e.g. they make money from it, find it fun, and wouldn't gain anything by reducing their gambling).



Perceptions of quitting and reducing

They are more likely than any of the other segments to want to gamble more in the future (11%) and are more likely than the average person who gambles to want to continue their current gambling frequency (89%).



Gambling problems

This group tends to be experiencing lower levels of problems from their gambling (vs. other segments), with an average PGSI score of 3. Three in ten (31%) have a PGSI score of 1+.



Demographics

This segment are more likely to be men than women (with an average age profile) and tend to be on lower incomes.



Gambling Activities

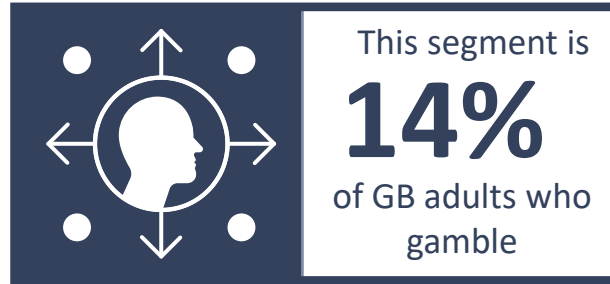
1. National Lottery Tickets – 67% ↓
2. Sports Betting – 28%
3. Scratch Cards – 27%

"I haven't reached out for any support as I don't feel like I need it." - Male, 18-24, PGSI 1-2

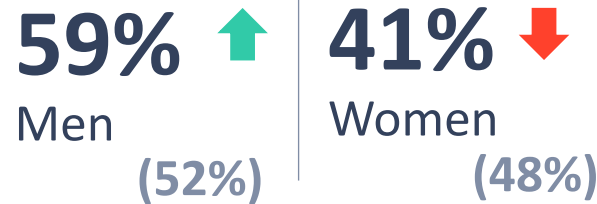
"Gambling has helped keep me busy and keep my mental health in check." - Female, 25-34, PGSI 8+

"I did not receive any help or support in regards to gambling as I don't feel I need to because I don't feel like my gambling is out of control." - Female, 25-34, PGSI 3-7

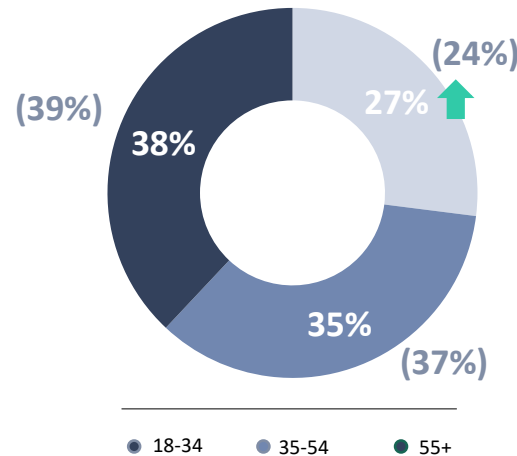
The numbers in grey represent the figures for people who gamble overall. The arrows indicate where people in this segment are more or less likely to fall into a group (green = higher and red = lower).



GENDER

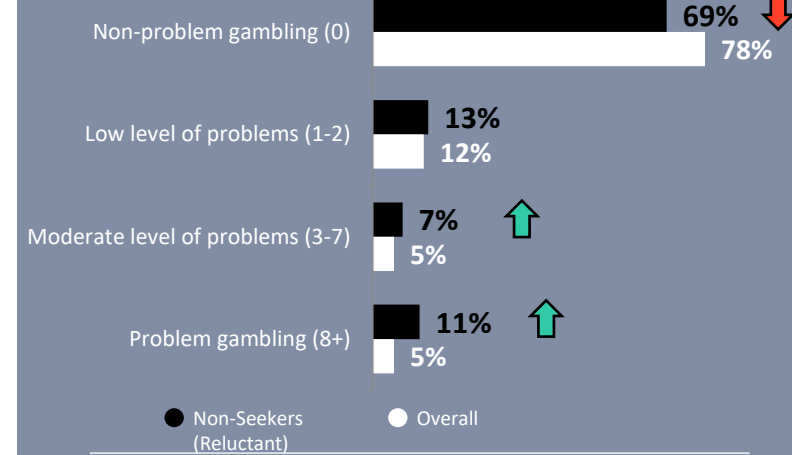


AGE

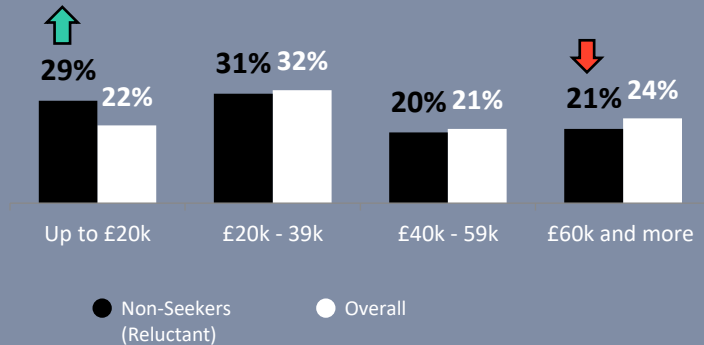


Base size: n=1,052 'Non-Seekers (Reluctant)' compared to n=7,028 people who gamble overall

PGSI SCORE

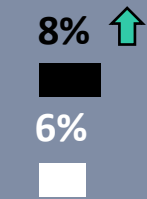


INCOME



ETHNICITY

Ethnic minorities



● Non-Seekers (Reluctant) ● Overall

Long-term and sustained support is seen to be the most helpful approach for this segment, despite being generally reluctant to seek support

What have they used before?

It is most common for this segment to believe that they do not have a gambling problem and as a result many do not seek support. It is observed that this reluctance stems from both considering gambling as a hobby/enjoyment, as well as fear of admitting that they have a problem.

“I don’t consider myself to have a problem, but I think I would feel ashamed and embarrassed to ask for support because it’s admitting there is a problem.” - Female, 25-34, PGSI 1-2

A small minority in this segment have used methods to reduce gambling, including talking to their partners or close ones, setting limits, blocking accounts, exercise, therapy, and deleting betting apps. They find their chosen methods to be helpful and effective, though some note the importance of sustained and long-term guidance as they fear going back to gambling without any continued support.

What would they find helpful?

This segment want approaches that are convenient, non-judgmental, and provide practical assistance.

“When it comes to receiving support with gambling, I would find it useful if there is a non-judgmental and supportive environment so I can openly discuss my struggles without fear of judgement.” - Female, 25-34, PGSI 3-7

They expressed reluctance about certain support formats, particularly group discussions due to a fear of being triggered by others' experiences. They prioritise informal support and personal relationships, where they are offered a more empathetic and understanding approach. One-on-one sessions with continued support along with confidentiality is seen to be important for this segment.

Most avoid support that is seen as profit-driven like that from betting companies. This type of support is considered ineffective and potentially harmful to their financial or personal well-being – offering only ‘quick fixes’.

The preference for online information and support and self-help apps reflects the segment's preference for non-judgemental and practical support

Qualitative

YouGov

Appealing

Self-help apps

It is believed that self-help apps could be beneficial if they were designed appropriately.

Friends/Family

Whilst most find friends/family to be the best and easy way for seeking support, some felt that it would be hard to open up to them.

Online information and support

This is seen as easy to access and appealing as well.

Formal Support

Most feel it would be easy to access, but there are mixed opinions on its appeal.

Telephone Helpline

There are mixed opinions, as some find it convenient, however, for others this form of support would be a cause of anxiety.

GP Support

Many find GPs extremely hard to access because of the long waiting time and lack of continued support.

Self-Exclusion

Though these are seen as easy to access, some feel that they are not for everyone and can be very restrictive.

Leaflets/Books

Most find leaflets/books very easy to access but feel it might provide too much information which may result in them being overwhelmed and not being able to implement it.

Tools on gambling sites

A few feel that gambling sites are an issue generally, so these tools would not be useful, whilst others say they do find them helpful.

Unappealing

Hard to access

Easy to access

Despite the segment's lack of motivation to reduce or quit gambling, advertisements are perceived as the key barrier to limiting their gambling

What are their motivators to quit or reduce?

Non-seekers display little to no motivation to reduce or seek support for their gambling. They link gambling with feelings of excitement and the potential to win money. Only a few associate gambling with negative outcomes, such as financial loss and increased debt.

"I currently feel negative towards getting support or reducing my gambling because I don't feel that I have a problem." - Female, 25-34, PGSI 3-7

It is worth noting that some participants express their willingness to seek support under specific instances such as debt repayment or when they want to save money and allocate their time to enhance their lives with activities other than gambling. A few others mention that family support serves as a motivator to reduce or seek support for gambling.

What are their barriers?

Non-seekers do not tend to perceive their gambling behaviour as an addiction or as a problem. Many have an optimistic outlook, believing that they can self-regulate their gambling. For them, quitting or reducing gambling would lead to a loss of additional income, as well as loss of excitement from their life.

"Online gambling because of the daily bonuses, free spending and promotions. They make it so attractive and alluring and it's near impossible to resist the temptation" - Female, 25-34, PGSI 3-7

Despite a lack of strong motivation to reduce or quit gambling, it is important to note that some mention that online games, advertisements with betting offers or emails from gambling companies act as barriers to stopping or reducing gambling as they serve as reminders of the excitement and fun of gambling.

Case study: Female, 25-34, PGSI 3-7, Non-Seekers (Reluctant)

Gambling journey and attitudes towards gambling

- H started gambling from a young age and this increased when she was working at an arcade. She usually gambles on lotteries especially the ones that go to charity as she feels she is supporting/contributing to a cause while trying to win from these lotteries. She also expressed that her primary aim when gambling is to derive enjoyment from the experience and therefore does not mind the losses from her gambling.

Attitudes towards gambling advice and support

- H does not consider her gambling a problem and hence does not feel that she needs to seek support to reduce or quit her gambling. However, she does say that she talks to her partner about money, and it helps her understand the importance of being cautious with it and therefore she aims to spend less on gambling.
- Furthermore, she mentioned that if she had to seek support, she would prefer online options as such options are easily accessible and provide instant support. She also told us that she would not reach out to a doctor or anyone from the NHS as she feels this would result in a strain on resources.

Motivators and barriers to quit or reduce their gambling

- She has mentioned that she does not find her gambling an issue and therefore would not reduce or seek support. However, she said that saving money would be the main motivation to reduce or quit gambling. However, she feels that the thrill from gambling overpowers the feeling of losing money.
- H further mentioned that the constant exposure to gambling, such as when she enters arcades or casinos or even at local shops that sells lottery tickets, creates a temptation and reminds her of the thrill and inhibits any feelings to quit. She added that the gambling apps also act as a barrier when these apps send notifications on the latest offers or deals, which again tempt her to gamble.

"I currently feel negative towards getting support or reducing my gambling because I don't feel that I have a problem."

"The gambling support that I would never try to reach out for is doctors/medical because This feels a waste of NHS... I feel like I would be a strain on NHS resources."

Key takeouts and activation

Key audience consideration

Recommendation

Given the sample is based on all people who gamble (including PGSI 0), the majority fall into the non-support seeking segments



This means there is a larger job in terms of building demand than harvesting it

People who gamble are more likely to want to reduce than quit, with the exception of those seeking formal support



This is important to keep in mind for communications across the journey, which should focus on reduction (as opposed to abstinence)

People who gamble often experience multiple intersecting challenges (e.g. mental health issues, financial situation etc.)



The range of support available should be promoted, emphasising how this can be used to create a holistic approach to quitting or reducing

A number of external and internal factors act as barriers to behaviour change, with gambling advertising, mental health, success concerns and stigma standing out



Communicating anonymity/confidentiality throughout the support process is vital. Concerns around success suggest lived experience stories are key.

Where support from friends and family is often easy to access and appealing to those seeking informal support, consideration should be given to how this impacts affected others



Ensure support available for affected others is well sign-posted and made available to those who look for it

Appendix

		Total	1	2	3	4	5	6	7
	Name	Total Sample	Self Helpers	Tool Seekers	Informal Support Seekers	Formal Support Seekers	Non-Seekers (Low Level)	Non-Seekers (Leisure)	Non-Seekers (Reluctant)
	% of total	100%	11%	1%	1%	1%	46%	25%	14%
Behaviour change	Quit	5%	31%	22%	37%	55%	0%	0%	0%
	Reduce	5%	31%	22%	37%	55%	0%	0%	0%
	No change	10%	69%	78%	63%	45%	0%	0%	0%
	More in future	81%	0%	0%	0%	0%	97%	95%	89%
PGSI	0	4%	0%	0%	0%	0%	3%	5%	11%
	1-2	78%	55%	19%	16%	20%	89%	81%	69%
	3-7	12%	20%	4%	13%	9%	9%	14%	13%
	8+	5%	16%	19%	21%	21%	1%	4%	7%
Gender	Men	5%	9%	57%	50%	49%	0%	2%	11%
	Women	52%	55%	69%	73%	79%	46%	55%	59%
Age	18-34	48%	45%	31%	27%	21%	54%	45%	41%
	35-54	24%	28%	65%	69%	61%	22%	19%	27%
	55+	37%	38%	29%	27%	19%	38%	37%	35%
Ethnicity	White	39%	34%	6%	3%	19%	40%	44%	38%
	Minority	94%	91%	75%	82%	83%	96%	95%	92%
Income (per annum)	Up to £20k	6%	9%	25%	18%	17%	4%	5%	8%
	£20-£39k	22%	28%	30%	31%	37%	21%	18%	29%
	£40k-£59k	32%	36%	36%	23%	28%	32%	33%	31%
	£60k and more	21%	18%	13%	21%	15%	21%	24%	20%
		24%	18%	21%	25%	20%	26%	25%	21%

Segmentation population estimates

DEMAND FOR GAMBLING SUPPORT SERVICES

These segments are divided into two categories (build or harvest demand) which refers to their demand for gambling support services.

BUILD DEMAND: This refers to the non-support seeking segments 5 (Low Level), 6 (Leisure), and 7 (Reluctant). These segments are not currently looking to quit or reduce their gambling and as a result do not look to use gambling support services. Whilst these segments often have low average PGSI scores, GambleAware should look to build demand for support services among those who do experience problem gambling to help them quit or reduce.

HARVEST DEMAND: This refers to segments 1 (Self Helpers), 2 (Tool Seekers), 3 (Informal Support Seekers) and 4 (Formal Support Seekers) who are looking to quit or reduce their gambling. Because these segments are looking to quit or reduce their gambling, GambleAware should ensure they are aware of the support services available to them and promote their usage as an effective way for these segments to quit or reduce.

POPULATION ESTIMATES CALCULATION

- Population estimates were calculated using ONS figures on the GB population aged 18+ and the population of people who gamble from the Treatment and Support Survey 2022. The Treatment and Support Survey is representative of Great Britain and provides a population estimate for people who gamble in Great Britain.
- Using the population estimate of people who gamble in Great Britain, the segmentation proportions were used to find the estimates of people who belong to each segment in Great Britain.

Segmentation method note

We ran a number of different iterations of the segmentation of people who gamble. We chose the option which provided the most distinct segments and which aligned most closely with GambleAware's objectives.

We then followed a hybrid approach using a rules based segmentation and a two step clustering process. In the first step, respondents were clustered using G5.

[G5] Which of the following best describes your current thoughts on your own gambling?

<1> I want to quit gambling

<2> I want to reduce my gambling, but not quit

<3> I don't want to gamble any more or less than I do currently

<4> I want to gamble more in the future

For this question, we identified two clusters: one cluster who say they want to quit or reduce gambling and one cluster who do not. Those identified as quitters/reducers at G5 were further clustered based on G12x.

[G12x] Do you currently want any external advice, tools and support to help you \$pipe2? Please select all that apply.

<1 xor> No, I do not want external advice, tools and support

<2> Yes, I want to use advice/informal support (e.g. from friends and family, websites, online forums, advice helpline)

<3> Yes, I want to use tools (e.g. self-exclusion software like GamStop, blocking software like GamBan, bank blocks)

<4> Yes, I want to use formal support (e.g. provided by GP, mental health or addiction services)

This created four segments among those who want to quit or reduce:

- Self-Helpers
- Tool Seekers
- Informal Support Seekers
- Formal Support Seekers

Those selecting codes 1 or 2 at G5 were put into segments using the SPSS code below.

```
TWOSTEP CLUSTER
/CATEGORICAL VARIABLES= G12x_1
G12x_2
G12x_3
G12x_4
/DISTANCE LIKELIHOOD
/NUMCLUSTERS fixed = 4
/HANDLENOISE 0
/MEMALLOCATE 64
/CRITERIA INITHRESHOLD(0) MXBRANCH(8) MXLEVEL(3)
/VIEWMODEL DISPLAY=YES
/PRINT IC COUNT SUMMARY.
```

For those not wanting to quit or reduce, people were asked what the reasons for this were.

[G6] Which, if any, of the following reasons best explains why you do not want to reduce your current level of gambling? Please select all that apply.

<1> It helps me relax / unwind / cope

<2> It is part of my daily life / routine

<3> All of my friends do it / it is part of my social life

<4> I would find it too difficult to do so

<5> I don't gamble that much

<6> It isn't causing me any negative consequences

<7> I enjoy it / find it fun

<8> I wouldn't gain anything from doing so

<9> I don't feel ready / prepared to do so

<10> I make money from it

<11> I have already reduced my gambling

<12> I wouldn't know what to do with my time if I wasn't gambling

<97 fixed> Other

<99 fixed xor> Prefer not to say

G7x was then used to identify the main reason for this, among those selecting more than one option at G6.

[G7x] And which of the following is the main reason why you do not want to reduce your current level of gambling? Please select only one.

<1 if 1 in G6> It helps me relax / unwind / cope

<2 if 2 in G6> It is part of my daily life / routine

<3 if 2 in G6> All of my friends do it / it is part of my social life

<4 if 4 in G6> I would find it too difficult to do so

<5 if 5 in G6> I don't gamble that much

<6 if 6 in G6> It isn't causing me any negative consequences

<7 if 7 in G6> I enjoy it / find it fun

<8 if 8 in G6> I wouldn't gain anything from doing so

<9 if 9 in G6> I don't feel ready / prepared to do so

<10 if 10 in G6> I make money from it

<11 if 11 in G6> I have already reduced my gambling

<12 if 12 in G6> I wouldn't know what to do with my time if I wasn't gambling

Three segments were identified from these, based on those selecting codes 3 or 4 at G5.

- Non Seekers (Low Level)
- Non Seekers (Leisure)
- Non Seekers (Reluctant)

Those selecting codes 3 or 4 at G5 were put into segments using the SPSS code below.

```
TWOSTEP CLUSTER
/CATEGORICAL VARIABLES= G6_G7x_merged
/DISTANCE LIKELIHOOD
/NUMCLUSTERS fixed=3
/HANDLENOISE 0
/MEMALLOCATE 64
/CRITERIA INITHRESHOLD(0) MXBRANCH(8) MXLEVEL(3)
/VIEWMODEL DISPLAY=YES
/PRINT IC COUNT SUMMARY.
```

Survey invites

YouGov has a proprietary, automated sampling system that invites respondents based on their profile information and how that aligns with targets for surveys that are currently active. Respondents are automatically, randomly selected based on which surveys are 'live' at the time and how that matches their profile information.

Respondents are contacted by email and invited to take part in an online survey without knowing the subject at this stage. We use a brief, generic email invitation which informs the respondent only that they are invited to a survey. This helps to minimise bias from those opting in/out based on level of interest in the survey topic. Additionally, conducting research in an online setting, where respondents feel a greater sense of anonymity, has been shown to minimise social desirability bias.

For this survey, YouGov targeted people who said they had gambled in the last 12 months.

Thank you!

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