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The marketing of wagering on social media: An analysis of promotional content on YouTube, Twitter and Facebook

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Abstract
Social media is increasingly used as a platform to promote products and services. Research on tobacco and alcohol has shown the extent to which dangerous consumption industries are moving from traditionally highly regulated media platforms, such as television, to marketing channels that are not subject to existing government regulation, and which governments appear much more reluctant to regulate.

Keywords
youtube, twitter, facebook, promotional, content, analysis, marketing, media, social, wagering

Publication Details

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Executive Summary

Overview

Social media is increasingly used as a platform to promote products and services. Research on tobacco and alcohol has shown the extent to which dangerous consumption industries are moving from traditionally highly regulated media platforms, such as television, to marketing channels that are not subject to existing government regulation, and which governments appear much more reluctant to regulate.

While there has been extensive discussion about the role of social media in the promotion of wagering products and services, there is little evidence about the extent and nature of such marketing. On one level it seems intuitive that sports betting, an industry highly dependent on mobile internet devices and online wagering as platforms for engaging customers in gambling services, would also turn to these same media platforms to promote its products. However, to our knowledge, there has been no published research that has mapped the range of marketing techniques used by wagering companies, or that has provided templates to enable the monitoring of these marketing techniques over time.

The research in this report sought to examine the extent and nature of the marketing of wagering on social media platforms, and the differences between and across wagering companies and social media platforms.

Social media is a relatively new phenomenon. Even the key social media platforms covered in this report have only been in existence for a few years. It will therefore be important to address current concerns about promotion and normalising of wagering through social media, but also to set in place strategies that will be appropriate in addressing future developments.

Aims

This project had three key aims.

1. To identify the extent and nature of marketing tactics used by sports wagering companies on three social media platforms: YouTube, Twitter and Facebook.
2. To construct a typology of marketing tactics used across the different social media platforms as a map for future research investigations.
3. To recommend initiatives that may be taken up by the foundation and similar public health organisations in relation to reducing harm from gambling products.
Research Questions

The research was guided by three research questions:

1. What is the extent and nature of sports betting industry promotional tactics on social media platforms?

2. Are there differences in the way in which promotional tactics are used across different social media platforms?

3. What types of advocacy strategies may be useful in responding to the promotional tactics used by the wagering industry on social media?

Methods

We conducted a mixed methods interpretive content analysis of social media promotions on YouTube, Twitter, and Facebook to explore the written, verbal and visual communication strategies used within the advertisements [Elo & Kyngas, 2008].

We focused on content posted in September 2014 and April 2015 to represent the end and start of the Australian Football League (AFL) and National Rugby League (NRL) seasons. We focused on content posted by six wagering providers across YouTube, Twitter and Facebook.

Our themes of investigation included:

1. User engagement
2. Branding and content link with sport
3. Promotional creative strategies
4. Specific wagering promotions
5. Appeal Factors
6. Content of ‘most popular’ videos.

Key Findings

Findings indicated that social media marketing for wagering products has added a new dimension to the way in which wagering is promoted to audience segments. Ten key themes emerged from our results that are likely to be of interest to the foundation, its associated services and policy makers:

1. The high volume of messages on some social media platforms (in particular Twitter), and the link between these messages and live sporting events.
2. The complex range of promotional strategies used within and across social media channels.
3. The use of marketing strategies (such as humorous videos or game commentaries) which consumers may not clearly understand or distinguish as promotions.
4. The use of videos that may promote content featuring alcohol consumption, risky behaviours, or standards deemed unacceptable by Australian society, and which also feature logos for the wagering company.

5. The use of Corporate Social Responsibility strategies that also promote wagering brands.

6. The co-branding of wagering promotions by sporting organisations and codes.

7. The promotion of special offers – in particular cash back, bonus bet or refund promotions - that may lead to a perception that there is a reduced risk of loss. These promotional offers may be particularly problematic when reinforced in real time during sporting matches.

8. The use of words or phrases that may promote perceptions of winning and value.

9. The use of strategies that may appeal to young people – in particular cartoons, memes, or celebrity endorsements within wagering promotions.

10. The lack of comprehensive harm minimisation messaging within social media promotional strategies.

**Recommendations**

Based on these findings, we recommend a number of initiatives that may be adopted by the foundation public health organisations, and community groups to respond to social media marketing strategies being utilised by the sports wagering industry. It is important that these initiatives are developed and undertaken independently from the wagering industry, whose primary aim is to promote the use of wagering products.

1. Increase public knowledge and awareness of the strategies used by the sports wagering industry to market products and services on social media channels.

2. Provide information to policy and decision-makers and regulators about the marketing of wagering, and the potential impact of marketing strategies on different segments of the population.

3. Engage sporting organisations in discussions about wagering promotions, including how promotions may influence gambling attitudes and behaviours, particularly in vulnerable populations such as children.

4. Develop research structures to map and monitor the tactics used by the sports wagering industry to promote their products on social media over time.

5. Engage in dialogue with social media companies (YouTube, Facebook, Twitter) about their roles and responsibilities in this space.
Background

1.1 Gambling harm in Australia

Gambling harm is increasingly recognised as a public health problem [Korn, Gibbins & Azmier, 2003]. Although its effects are felt globally, Australians experience the highest per capita losses worldwide [The Economist, 2014]. The Productivity Commission reported in 2010 that between 80 000 and 160 000 Australian adults experienced significant problems with gambling each year, with an additional 230 000 to 350 000 at moderate risk of being vulnerable to gambling harm [Productivity Commission, 2010]. Whilst at times causal pathways are complex and difficult to extricate, researchers agree that those suffering from gambling harm also suffer from a number of serious co-morbidities [Penfold et al. 2006; Hodgins, Mansley & Thygesen, 2006; Lorains, Cowlishaw & Thomas, 2011; Livingstone, 2012; Rintoul et al. 2013; Martin et al. 2014]. These include health implications such as depression and anxiety [Petry, Stinson & Grand, 2005; Dhillon & Bowden-Jones, 2012; Martin et al. 2014], substance use and misuse [Stewart & Kushner, 2003; Petry, Stinson & Grand, 2005; Penfold et al. 2006] suicide and suicidal ideation [Newman & Thompson, 2003; Ledgerwood & Petry, 2004; Hodgins, Mansley & Thygesen, 2006; Penfold et al. 2006] and social effects that include homelessness [Gattis & Cunningham-Williams, 2011], financial ruin [Svensson, 2011; Walker, Abbott & Gray, 2012], domestic violence [Muelleman et al. 2002; Korman et al. 2008] and family and partner relationship breakdown [Holdsworth et al. 2013].

1.2 Sports betting: new products and new media promotions

Over the past decade Australians have seen the rapid emergence of online and mobile sports-based wagering [The Productivity Commission, 2010; The Parliamentary Joint Select Committee, 2011]. Approximately 424 000 online sports betting accounts were active in 2008 (a 103% increase from those reported in 2004) and $391 million was spent on sports betting in the same year (a 73% increase on 2004 expenditure) [Productivity Commission, 2010]. In 2014, it was predicted that Australians would bet approximately $1200 a head on close to 90 000 different international and national sporting events and codes [Rothfield, 2014]. Paralleling this emergence has been the increase in the promotion of sports betting products, and their brands [Thomas et al. 2012a; Thomas et al. 2012b] and whilst in its infancy, research has begun to explore the extent and content of sports wagering marketing [Thomas et al. 2012a; Thomas et al. 2012b].
As researchers increasingly recognise the importance of framing gambling as a public health issue, many of the commercial and contextual determinants of gambling harm have been investigated [Korn, Gibbins & Azmier, 2003; Adams, Raeburn & de Silva, 2009]. Researchers describe how the technological age has ‘revolutionised’ gambling opportunities [Derevensky, 2012, p. 23], offering efficient and effective accessibility to a broader range of gambling products [Derevensky, 2012]. We now have the opportunity to access these products 24 hours a day via mobile or internet connections, from the comfort of our own home or workplace [Derevensky, 2012; McMullan & Kervin, 2012]. Social media also provided gambling companies with new opportunities with which to market their products.

Research has shown the ways in which the tobacco and alcohol industries have shifted their focus from traditional mass media channels, such as television and radio, to newer media platforms that optimise the possibility to reach mass audiences [Griffiths & Casswell, 2010; Chester, Montgomery & Dorfan, 2010; Freeman & Chapman, 2010; Mart, 2011; Freeman, 2012; Nicholls, 2012; Thomson, Wilson & Hoek 2012; Brodmerkel & Carah, 2013; Carah, Brodmerkel & Hernandez, 2014; Winpenny, Marteau & Nolte, 2014; Depue et al. 2015; Liang et al. 2015]. Researchers describe how new media has inspired marketing communications that are dynamic, interactive, or participatory, and engaging [Freeman & Chapman, 2007; Dewhirst, 2009]. Companies are able to position their branding information more as a ‘conversation’ with consumers [Dewhirst, 2009]. The use of social networking sites, such as ‘Facebook’, ‘Twitter’ and ‘YouTube’, has also enabled industry to overcome legislative barriers that apply to traditional media platforms [Freeman, 2012].

1.3 Social Media Platforms

1.3.1 YouTube

Founded in early 2005, YouTube is a free service where subscribers can upload videos and share them with an audience of hundreds of millions [YouTube, 2015]. Over one billion users visit YouTube each month with more than six billion hours of videos viewed [Barry et al. 2015]. Links to posted videos are easily shared through social media networks, allowing the effortless spread of video content [Freeman & Chapman, 2007]. Whilst originally designed for consumer-generated videos, the site has evolved rapidly, and given its reach and simplicity, has attracted manufacturers and marketers of consumer goods [Freeman & Chapman, 2007]. Companies are also able to rely on users-as-distributors of promotions [Barry et al. 2015].

Research has suggested that YouTube has been used by the tobacco and alcohol industries to keep products favourably in the minds of current and potential consumers, and to reach vulnerable audience segments [Freeman & Chapman, 2007; Freeman, 2012; Elkin, Thomson & Wilson, 2010; Kim, Paek & Lynn, 2010; Barry et al. 2015; Liang et al.
YouTube is a popular site among adolescents, with 50% of teenagers citing YouTube as their favourite website [Barry et al. 2015]. Further, 58% of generation X (1961-1979), 70% of generation Y (1980-1995) and 83% of generation Z (1995-2012) access YouTube on a monthly basis [Barry et al. 2015]. YouTube is considered a covert medium of marketing labelled as ‘below the line’ marketing [Freeman & Chapman, 2007]. Research has yet to explore the gambling industry’s use of YouTube to position products desirably in the minds of consumers of any or all ages.

1.3.2 Twitter

Another form of social media is microblogging, a concept commonly associated with Twitter, the most widely used microblogging site in the world [Burton, Dadich & Soboleva, 2013]. Twitter allows users to post short text messages to individuals who have chosen to ‘follow’ the sender and followers are able to actively engage and forward or ‘retweet’ other’s messages [Burton, Dadich & Soboleva, 2013]. Launched in 2006, Twitter has 302 million daily users, who collectively send over 500 million tweets daily [Twitter, 2015]. Of these active users, 80% use their mobile phone as a medium to tweet and/or retweet [Twitter, 2015].

Alcohol and tobacco brands have made extensive use of Twitter [Mart, 2011; Nicholls 2012; Dadich, Burton & Soboleva, 2013]. Alcohol companies have been known to make use of popular hashtags, and in so doing align their tweets with culturally popular and appealing customs and appeals, such as sport [Burton, Dadich & Soboleva, 2013]. The use of popular hashtags by the alcohol industry is reminiscent of tobacco companies’ attempts to associate consumer products with positive symbols and themes [Dadich, Burton & Soboleva, 2013].

1.3.3 Facebook

Facebook is the most popular social networking site in the world [Freeman et al. 2014]. As of March 2015, 1.44 billion users accessed the site at least monthly and 936 million accessed the site daily [Facebook, 2015]. Facebook app development has also stimulated mobile access with 798 million daily mobile users [Facebook, 2015]. From November 2007, Facebook embraced companies and commercial brands developing their own Facebook pages, and thus their own online identities [Freeman et al. 2014]. Companies can ‘post’ images, videos, links, offers, competitions and a range of other digital media to their page timelines [Freeman et al. 2014]. Consequently, potentially harmful commodity industries are able to frame their image, engage and interact with consumers, and evade legislative barriers [Dewhirst, 2009; Freeman, 2012; Carah, Brodmerkel & Hernandez, 2014]. When consumers ‘like’ a company page to receive timeline updates, any consumer engagement with company pages may appear in the news feed of another’s Facebook [Freeman et al. 2014]. Thus, companies are able to effortlessly spread their marketing messages and brand images across multiple social networks [Griffiths & Casswell, 2010;
1.4 Using marketing to appeal to vulnerable groups

Marketing is utilised by companies to align favourable associations with consumer products and services, and often used to re-work the meanings that may surround consumption of those products and services [Wakefield et al. 2002; Towns, Parker & Chase, 2012; Freeman, 2012]. New media forms offer these industries powerful channels in which to rapidly counteract government policies that seek to denormalise risky behaviours in our society [Freeman, 2012]. Research on these industries has also shown that favourable symbolic alignments with consumer products and company brands have directly appealed to two distinct population groups: young men [Strate, 1992; Alaniz & Wilkes, 1998; Anderson, Dewhirst & Ling, 2006; Pettigrew et al. 2013] and children [Nash, Pine & Messer, 2009; Hastings et al. 2010]. In relation to the former, ideals of mateship [Strate, 1992; Pettigrew et al. 2013], hegemonic masculinity and gender roles [Strate, 1992; Towns, Parker & Chase, 2012] and adventure [Strate, 1992; Anderson, Dewhirst & Ling, 2006], have been used to promote alcohol, tobacco and gambling products to young men. In relation to the latter, cartoon and animation [Chen et al. 2005; Nash, Pine & Messer, 2009; Hastings et al. 2010], animals [Chen et al. 2005; Nash, Pine & Messer, 2009; Hastings et al. 2010], humour [Chen et al. 2005; Nash, Pine & Messer, 2009; Hastings et al. 2010] and sponsorship arrangements [Hastings et al. 2010] have also been shown to appeal to young people.
Methods

We employed a mixed methods interpretive content analysis of social media promotions on YouTube, Twitter, and Facebook to explore the written, verbal and visual communication strategies used within the marketing promotions [Elo & Kyngas, 2008].

2.1 Sample

2.1.1. Wagering Providers

For this study we chose to focus on the marketing activities of seven wagering brands:

- Crownbet.com.au
- Ladbrokes.com.au
- Sportsbet.com
- Tab.com.au
- TomWaterhouse.com.au
- Unibet.com.au
- WilliamHill.com.au

We selected these brands to represent companies with different marketing approaches, and that had been in the wagering market for different lengths of time, with a range of more established Australian brands (such as Sportsbet.com.au and Tab.com.au) and newer brands in the Australian market (such as Crownbet.com.au, Ladbrokes.com.au and WilliamHill.com.au). These brands also represented sponsorship relationships with different sporting teams and codes.

Social media platforms

We focused on three social media platforms – YouTube, Twitter and Facebook – to represent a variety of different types of marketing channels.
2.1.2 Timeframe

For this study we focused on activity in two specific months: September 2014 to represent the final seasons for the Australian Football (AFL) and National Rugby League (NRL); and April 2015 to represent the start of the AFL and NRL season. We chose these two time periods as we hypothesised that there would be extensive marketing activity at the start and end of the Australian football seasons.

The specific data collection points for each team and media platform are provided in Table 2.1.2.1. We were unable to collect data for all time points for some brands for three reasons:

1. The brand did not exist in that time period.
2. No content had been posted during that time period.
3. The data had been removed or was unable to be accessed.

It should be noted that the April data collection was conducted over a weekend that included a national Australian public holiday.

Table 2.1.2.1
Data collection for Wagering Brands

<table>
<thead>
<tr>
<th>Data Collection Points</th>
<th>YouTube</th>
<th>Twitter</th>
<th>Facebook</th>
</tr>
</thead>
<tbody>
<tr>
<td>Crownbet.com.au</td>
<td>-</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Ladbrokes.com.au</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Sportsbet.com.au</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Tab.com.au</td>
<td>-</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>TomWaterhouse.com.au</td>
<td>✓</td>
<td>-</td>
<td>✓</td>
</tr>
<tr>
<td>Unibet.com.au</td>
<td>No YouTube channel</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>WilliamHill.com.au</td>
<td>-</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

2.1.3 Most popular YouTube videos

Table 2.1.3.1 provides information about the videos that were included in the ‘most popular’ analysis. For this analysis we included the two most popular television based commercials (TVC), and the two most popular non-television based content (non-TVC).
Table 2.1.3.1
Most Popular Video

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>The game just changed (TVC)</td>
<td>Mobile app ‘Bad Reception’ (TVC)</td>
<td>Pick the AFL Ladder for a chance to win up to $100M (TVC)</td>
</tr>
<tr>
<td>500K R1 quick cash tipping giveaway (TVC)</td>
<td>Sports bet mobile app ‘Live betting’(TVC)</td>
<td>AFL Pick the ladder for a chance – win up to $100M (TVC)</td>
</tr>
<tr>
<td>Pick a winner round 1 extra (non-TVC)</td>
<td>Wife Swap AFL V NRL (non-TVC)</td>
<td>After the siren (non-TVC)</td>
</tr>
<tr>
<td>Pick a winner round 1 full show (non-TVC)</td>
<td>Sh*t you can do at the cricket but not in the office (non-TVC)</td>
<td>Daisy’s Weekly Preview-Round 2 (non-TVC)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><a href="https://www.youtube.com/watch?v=LqG5M9I1RjU">https://www.youtube.com/watch?v=LqG5M9I1RjU</a></td>
<td><a href="https://www.youtube.com/watch?v=6fc7ng-7djY">https://www.youtube.com/watch?v=6fc7ng-7djY</a></td>
<td><a href="https://www.youtube.com/watch?v=jbkijm4AlEI">https://www.youtube.com/watch?v=jbkijm4AlEI</a></td>
</tr>
<tr>
<td></td>
<td><a href="https://www.youtube.com/watch?v=0cyE3_0MiQo">https://www.youtube.com/watch?v=0cyE3_0MiQo</a></td>
<td><a href="https://www.youtube.com/watch?v=a2pixOgwKE">https://www.youtube.com/watch?v=a2pixOgwKE</a></td>
</tr>
</tbody>
</table>

2.2 Development of Coding Frameworks

For this study we focused on six key themes of investigation. Each of these themes had a number of distinct informational categories that were then used to develop coding sheets, which were applied across each social media platform. Categories within themes were identified via a range of inductive and deductive approaches. Coding frameworks were developed for each social media platform.

1. User engagement

This included the extent to which users engaged with content on social media channels. To examine this we documented the following:

- **YouTube**: number of subscribers to channels; number of views per video; average and range of views per month; number of video ‘likes’; average and range of ‘likes’ per month.
2. Branding and content link with sport

We collected data on the branding of social media posts to assess the extent to which logos for wagering companies were present. We collected this data because the format and content of promotions on social media can differ substantially from those typically used in more traditional advertising channels such as television or print. We were also interested in the extent to which promotions were co-branded by other organisations. To examine this we documented the following:

- **YouTube**: company name/logo visual; company name/logo audio; partner name/logo visual.
- **Twitter**: use of hashtag that related to the AFL or NRL that related to either a specific game, specific players or the sporting code (#AFL or #NRL); company name/logo.
- **Facebook**: company name/logo in post; link to company website; reference to company website.

We also examined the extent to which promotional content related to specific national or international sports or horse racing.

- **YouTube**: national sport (AFL/NRL); international sport; horse racing.
- **Twitter**: national sport (AFL/NRL); international sport; horse racing; tweet directly relating to a sporting match; tweet relating to material outside of a sporting match; mention of individual athlete/coach; mention of fan behaviours.
- **Facebook**: national sport (AFL/NRL); international sport; national horse racing; international horse racing; mention of individual athlete/coach; mention of fan behaviours.

3. Promotional creative strategies

For this theme we were interested in the range of different types of creative strategies that were used in social media promotions. We used an inductive approach to identify the categories used for the content analysis. The following categories were identified and included for each platform.

- **YouTube**: wagering promotion; game commentary; advertisement; comedy/parody video; Corporate Social Responsibility (CSR) video; stunt; competition.
- **Twitter**: game statistics/news/commentary; wagering promotions and/or information; comedy/satire; cartoons; sporting nostalgia/history.
4. Specific wagering promotions

We were then interested in the specific content of wagering promotions across the social media platforms. Similar to the promotional creative strategies, we initially used an inductive approach to identify categories to be included in the coding framework. The following categories were identified and included in the content analysis for each platform.

- **YouTube**: odds; tipping; mobile betting; prompts to bet; refund information; live betting; bonus bets; cash out; winner’s information; responsible gambling message.

- **Twitter**: prompts to bet; odds information; refund information; bonus bets; tipping; winner’s information; cash out; multi-bets; responsible gambling message.

- **Facebook**: prompts to bet; tipping; odds information; insider information; responsible gambling message; competitions; refund information; winner’s information and; multi-bets

5. Appeal Factors

Finally, the social media strategies used by the wagering industry were classified against two pre-developed coding frameworks [Deans et al; in preparation; and Pitt et al; in preparation] to examine appeal strategies as they apply to adults and children. We applied these to the content of YouTube videos only.

To identify symbolic content within wagering advertising, we applied a coding framework developed by Deans and colleagues [in preparation] to YouTube content. The framework included categories relating to social status, winning, mateship, adventure, patriotism, power and control, happiness, as well as the use of sexualised imagery and gender stereotypes and a focus on sports fan behaviours [Deans et al., in preparation].

To identify the factors that may appeal to children we used previously developed categories of: humour, sound, cartoons, animals, stories, sexual success, social success, sporting success, colours, words or text, simple messages, value; and winning [Pitt et al, in preparation].

6. Content of ‘most popular’ videos

It was evident during the process of analysis that there were other instances of social media activity that were very highly viewed and shared but were outside the timeframes selected for this analysis. Given the identified potential for YouTube clips to appeal to, and be viewed by, children and adults we identified the two most popular television based commercials and the two most popular non-television based content YouTube clips for three wagering brands: Crownbet.com.au, Sportsbet.com.au and WilliamHill.com.au, to examine the content of those videos that had been shared and watched most frequently on this widely available social media platform.
2.3 Data Collection

Research assistants were trained in use of the coding frameworks. For content on YouTube and Facebook, researchers worked in pairs to code data. Because of the amount of data present on Twitter it was not feasible for researchers to always work in pairs. For Twitter, researchers conducted the analysis in pairs until there was clear consensus on categories reached. Researchers then worked independently. Reliability checks were performed on a sample of the data across each of the platforms.

2.4 Analysis

Data was entered into spreadsheets on Microsoft Excel. Frequency counts were then performed across each of the categories, with basic descriptive statistics compared and contrasted across the categories.
Results

3.1 User engagement across social media platforms

The following tables assess the extent to which users of social media platforms are engaged with sports betting brands on YouTube (Table 3.1.1.1), Twitter (Table 3.1.2.1) and Facebook (Table 3.1.3.1).

3.1.1 YouTube

While YouTube had the least active subscribers to the channel, users had engagement with the channel through video views. Some industry content was viewed more often than others, with content viewed the most on Sportsbet.com.au (441,768 views of 6 videos posted across two months); Ladbrokes.com.au (832,363 views of 15 videos posted across two months); and WilliamHill.com.au (179,270 views of 3 videos posted across one month). In contrast, some brands (Tab.com.au; Crownbet.com.au and TomWaterhouse.com.au) had very limited engagement with users via YouTube, as determined by number of views, subscribers and likes.

As will be shown later in this report, this may partly relate to the content posted on these channels. Sportsbet.com.au, WilliamHill.com.au and Ladbrokes.com.au posted more advertising and promotional content, whilst Crownbet.com.au and Tab.com.au posted more specific tipping and odds based videos relating to particular sporting or horse racing events. The latter also posted significantly more content. Crownbet.com.au posted 51 videos in April 2015, as compared to Sportsbet.com.au who posted only 6 videos across September 2014 and April 2015.
Table 3.1.1

User Engagement with YouTube Videos (September 2014/April 2015)

<table>
<thead>
<tr>
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<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Subscribers</td>
<td>0</td>
<td>492</td>
<td>5053</td>
<td>567</td>
<td>472</td>
<td>797</td>
<td>7 381</td>
</tr>
<tr>
<td>Videos Posted</td>
<td>51</td>
<td>15</td>
<td>6</td>
<td>16</td>
<td>5</td>
<td>3</td>
<td>96</td>
</tr>
<tr>
<td>Views</td>
<td>1 094</td>
<td>832 363</td>
<td>441 768</td>
<td>655</td>
<td>2 948</td>
<td>179 270</td>
<td>1 458 098</td>
</tr>
<tr>
<td>Average views per month</td>
<td>N/A</td>
<td>416 181.5</td>
<td>220 884</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Range of views per month</td>
<td>45 – 73 621 (Sept 2015)</td>
<td>605 – 232 298 (Sept 2014)</td>
<td>14 - 655</td>
<td>506 – 703</td>
<td>2 083 - 175 073</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Likes</td>
<td>1</td>
<td>12</td>
<td>178</td>
<td>0</td>
<td>4</td>
<td>2</td>
<td>197</td>
</tr>
<tr>
<td>Average per month</td>
<td>N/A</td>
<td>6</td>
<td>89</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Range of likes per month</td>
<td>0-1</td>
<td>0-5 (Sept 2014)</td>
<td>7-13</td>
<td>0</td>
<td>0-2</td>
<td>0-1</td>
<td>-</td>
</tr>
</tbody>
</table>

*Brand did not exist in September 2014
** Content only available for April 2015
*** Content only available for September 2014

3.1.2 Twitter

A total of 191,074 accounts followed sports wagering companies on Twitter. The number of followers of sports wagering brands on Twitter ranged from 102,000 (Sportsbet.com.au) to 4382 (Ladbrokes.com.au). It should be noted that Crownbet.com.au is a newer brand, therefore we would expect this brand to gain more followers over time. All sports wagering brands posted multiple tweets per day during the data collection period, ranging from an average of 58 tweets per day (WilliamHill.com.au) to 4.3 tweets per day (Unibet.com.au). Some brands posted significantly more content on Twitter, with WilliamHill.com.au (average 58 tweets per day), Sportsbet.com.au (average 53 tweets per day); Tab.com.au (32.3 tweets per day); and Crownbet.com.au (31.3 tweets per day). Tweets contained multiple forms of content, with over half of all tweets featuring a picture (n=336), and about one in nine tweets featuring a video (n=51).

User engagement with tweets varied according to brand. Tweets from Sportsbet.com.au were the most shared (total of 783 retweets, an average of 5 retweets per tweet), while most other brands averaged 1 or less retweets per tweet.
**3.1.3 Facebook**

Sports wagering dedicated Facebook pages had the highest number of ‘likes’ across the three social media platforms, with a total of 1,372,707 ‘page likes’ across the seven wagering brands (Table 3.1.3.1). However, there was substantial difference in likes, ranging from the most ‘liked’ wagering brand 512,245 (Sportsbet.com.au) to 11,200 (Crownbet.com.au) which had the least page likes. Of note is Unibet.com.au which had very limited user engagement on Twitter and had no Australian YouTube channel, but had 434,578 ‘page likes’ on Facebook. However, this brand had the fewest Facebook post likes (574) or shares (7) of the brands despite posting the most content on average/month of any of the brands. Sportsbet.com.au and Tab.com.au had the most user engagement as measured through total number of Facebook post shares and likes with 29,034 shares and 174,865 likes for Sportsbet.com.au, and 12,539 shares and 75,007 likes for Tab.com.au.
3.2 Branding and content link with sport

The following section presents findings relating to the branding of postings on each social media channel. It also presents the findings relating to the sporting code content of postings.

3.2.1 YouTube

Table 3.2.1.1 outlines the branding and sporting code content of postings on YouTube. Postings most commonly contained visual representations of wagering company logos. Crownbet.com.au YouTube content contained the most visual representations of brand logos with 243 instances of logos present across 51 posted videos in April 2015.

Partner logos were present on videos posted on the CrownBet.com.au YouTube channel and on the WilliamHill.com.au YouTube channel. For WilliamHill.com.au these included visuals for the William Hill sponsorship of Carlton Football Club (Image 3.2.1.1), whilst AFL.com.au logos were present in Crownbet.com.au videos (Image 3.2.1.2).

Of 62 videos relating to national sport, 58 related to AFL. However, a substantial proportion was from wagering provider Crownbet.com.au. A smaller proportion of videos featured horse based wagering (n=31), with over half of these videos from provider Tab.com.au (n=16).
Table 3.2.1.1

YouTube Branding and Links to Sport (September 2014/April 2015)

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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Company name/logo – visual</td>
<td>243</td>
<td>32</td>
<td>34</td>
<td>176</td>
<td>49</td>
<td>13</td>
<td>547</td>
</tr>
<tr>
<td>Partner name logo – visual</td>
<td>64</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>37</td>
<td>101</td>
</tr>
<tr>
<td>Company name/logo – audio</td>
<td>7</td>
<td>26</td>
<td>3</td>
<td>32</td>
<td>1</td>
<td>2</td>
<td>71</td>
</tr>
</tbody>
</table>

**Sports Related**

| National                              | 51                       | 7                        | 2                      | 0                   | 0                             | 2                         | 62            |
| AFL                                   | 51                       | 4                        | 1                      | 0                   | 0                             | 2                         | 58            |
| NRL                                   | 0                        | 3                        | 1                      | 0                   | 0                             | 0                         | 4             |
| International                         | 0                        | 0                        | 0                      | 0                   | 0                             | 1                         | 1             |

**Horse Related**

| National                              | 0                        | 8                        | 1                      | 16                  | 5                             | 0                         | 30            |
| International                         | 0                        | 0                        | 1                      | 0                   | 0                             | 0                         | 1             |

*Brand did not exist in September 2014
**Content only available for April 2015
***Content only available for September 2014

Image 3.2.1.1: Example of Carlton Football Club logo embedded within WilliamHill.com.au wagering promotion posted on Facebook page

3.2.2 Twitter

A total of 125 tweets featured a wagering logo within the tweet (outside the username). Approximately one third of these were from Tab.com.au (n=52), followed by Crownbet.com.au (n=29) and Ladbrokes.com.au and TomWaterhouse.com.au (with 17 each) (Table 3.2.2.1).
Most wagering companies linked their tweets to sporting matches by using game based hashtags. Wagering companies used these hashtags to embed the tweet into existing twitter feeds about specific games (e.g. #AFLPowerHawks as shown in Image 3.2.2.1). For example, over the three days of investigation, 174 tweets featured an AFL based hashtag, and 156 tweets featured an NRL based hashtag. Wagering providers Sportbet.com.au (n=55 #AFL and n=53 #NRL), WilliamHill.com.au (n=50 #AFL and n=33 #NRL) and Tab.com.au (n=37 #AFL and n=42 #NRL) used game based hashtags the most often.

![Image 3.2.2.1: Use of Sports Related Hashtag](https://twitter.com/sportsbetcomau)
Of 397 tweets about national sports, the content of 202 tweets related to AFL, and 180 tweets related to NRL. The content of sports related tweets was predominantly linked directly to either national or international sporting matches (n=432), sporting activity outside a game setting (n=94) or fan related activity (n=13). Approximately one quarter of all sports related tweets referred to an individual athlete or coach (n=133), with about half of these tweets from wagering provider Sportsbet.com.au (n=68) (Image 3.2.2.2).

![Image 3.2.2.2: Tweet mentioning an athlete or coach](https://twitter.com/sportsbetcomau (25/5/15))

### 3.2.3 Facebook

There were 159 instances of company logos present within Facebook postings. Logos were predominantly used in Facebook postings from Ladbrokes.com.au (n=45); CrownBet.com.au (n=34); Sportbet.com.au (n=29) and Tab.com.au (n=27) (Table 3.2.3.1).

A total of 118 Facebook posts related to AFL, with 103 relating to NRL. Similarly to Twitter (n=50), Facebook posts referred to international sport (n=59). Also seen on Twitter (n=133), many Facebook posts mentioned an individual athlete or coach (n=137) (Image 3.2.3.1).
Table 3.2.3.1
Facebook Branding and links to Sport (September 2014/April 2015)

<table>
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<tr>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Company logo in post</strong></td>
<td>34 (n=42)</td>
<td>45 (n=52)</td>
<td>29 (n=59)</td>
<td>27 (n=67)</td>
<td>3 (n=46)</td>
<td>7 (n=70)</td>
<td>14 (n=44)</td>
<td>159 (n=380)</td>
</tr>
<tr>
<td><strong>Link to company website</strong></td>
<td>13 (n=34)</td>
<td>30 (n=47)</td>
<td>10 (n=29)</td>
<td>6 (n=27)</td>
<td>3 (n=27)</td>
<td>60 (n=42)</td>
<td>8 (n=14)</td>
<td>130 (n=380)</td>
</tr>
<tr>
<td><strong>Reference to company website</strong></td>
<td>3 (n=34)</td>
<td>45 (n=47)</td>
<td>27 (n=29)</td>
<td>7 (n=27)</td>
<td>4 (n=27)</td>
<td>9 (n=14)</td>
<td>3 (n=13)</td>
<td>98 (n=380)</td>
</tr>
</tbody>
</table>

**Sports Related**

| **National** | 29 (n=42) | 47 (n=52) | 32 (n=59) | 31 (n=67) | 42 (n=46) | 26 (n=70) | 28 (n=44) | 235 (n=380) |
| **AFL** | 28 (n=34) | 19 (n=47) | 9 (n=29) | 13 (n=27) | 24 (n=27) | 9 (n=42) | 16 (n=14) | 118 (n=380) |
| **NRL** | 1 (n=34) | 25 (n=47) | 21 (n=29) | 16 (n=27) | 17 (n=27) | 16 (n=42) | 7 (n=14) | 103 (n=380) |
| **Other** | 0 (n=34) | 3 (n=47) | 2 (n=29) | 2 (n=27) | 1 (n=27) | 1 (n=42) | 5 (n=14) | 14 (n=380) |
| **International** | 7 (n=34) | 4 (n=47) | 2 (n=29) | 15 (n=27) | 2 (n=27) | 19 (n=42) | 10 (n=14) | 59 (n=380) |

**Horse Related**

| **National** | 3 (n=42) | 14 (n=52) | 3 (n=59) | 9 (n=67) | 2 (n=46) | 21 (n=70) | 4 (n=44) | 56 (n=380) |
| **International** | 0 (n=34) | 0 (n=47) | 0 (n=29) | 0 (n=27) | 0 (n=27) | 0 (n=42) | 0 (n=14) | 2 (n=380) |

**Sporting activity**

| **Directly related to game** | 37 (n=42) | 38 (n=52) | 25 (n=59) | 35 (n=67) | 44 (n=46) | 72 (n=70) | 28 (n=44) | 279 (n=380) |
| **Mention of individual athlete or coach** | 8 (n=34) | 1 (n=47) | 26 (n=29) | 16 (n=27) | 40 (n=27) | 24 (n=42) | 22 (n=14) | 137 (n=380) |
| **Outside the game** | 5 (n=34) | 14 (n=47) | 27 (n=29) | 12 (n=27) | 2 (n=27) | 5 (n=42) | 11 (n=14) | 76 (n=380) |
| **Fan Related** | 0 (n=34) | 0 (n=47) | 2 (n=29) | 1 (n=27) | 32 (n=27) | 32 (n=42) | 5 (n=14) | 72 (n=380) |

*Content was only available for April 2015*
3.3 Promotional Creative Strategy

The following section presents results relating to the different types of creative strategies that were used by brands across each of the social media platforms.

3.3.1 YouTube

Different brands utilised their YouTube channel in different ways. Seven main categories of promotional content were observed.

1. Wagering promotions
2. Game commentaries
3.Advertisements
4. Comedy/Parody
5. Corporate Social Responsibility Initiatives (CSR)

6. Stunts

7. Competitions.

Table 3.3.1.1 shows that different companies used different creative strategies on YouTube. The most frequently posted content included wagering promotions or game commentary (including sporting and horse racing commentary), which were primarily used by Crownbet.com.au and Tab.com.au. The promotions for both sports and horse racing featured odds or cash back specials. These will be described in more detail in Section 3.4.

Crownbet.com.au was the brand that posted the most direct wagering promotion videos. This was done via a panel type video featuring former Australian Football League players Wayne Carey, Campbell Brown, and Ben Dixon. During the predominantly odds based promotion, Carey and Brown gave their betting tips for the week, with a different video posted for each game of the round (Image 3.3.1.1).

Table 3.3.1.1
YouTube Creative Strategy (September 2014/April 2015)

<table>
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<tr>
<th></th>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Wagering promotion</td>
<td>51</td>
<td>15</td>
<td>1</td>
<td>16</td>
<td>1</td>
<td>3</td>
<td>87</td>
</tr>
<tr>
<td>Game commentary</td>
<td>50</td>
<td>0</td>
<td>0</td>
<td>16</td>
<td>4</td>
<td>0</td>
<td>70</td>
</tr>
<tr>
<td>Advertisement</td>
<td>4</td>
<td>15</td>
<td>3</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>24</td>
</tr>
<tr>
<td>Comedy/Parody</td>
<td>0</td>
<td>2</td>
<td>4</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>6</td>
</tr>
<tr>
<td>CSR</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>Stunt</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
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<td>1</td>
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<td>Competition</td>
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<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

*Brand did not exist in September 2014
** Content only available for April 2015
*** Content only available for September 2014
++++ Videos could include more than one creative
Sportsbet.com.au used a range of promotional materials, including postings of television advertisements, comedy videos, and videos of stunts. In the sample period, the ‘stunt’ video was also a video of a Corporate Social Responsibility initiative. The video entitled “World’s Biggest Blue Balls” (605 views) captured the painting of the Goulburn Big Merino’s testicles, blue (Image 3.3.1.2). This CSR initiative aimed to raise awareness of testicular cancer with a financial donation presented to a chosen charity. The video still regularly featured the Sportsbet.com.au logo, thus also promoting the brand (including on the testicles of the ram).
The main difference to emerge between Sportsbet.com.au YouTube content and content from other brands was the use of comedy or parody videos – for example ‘NRL Fan Fraud’ (168,655 views) and ‘AFL Fan Fraud’ (232,298 views). While these videos did not directly promote gambling, the Sportsbet.com.au logo was present throughout the videos. These videos received substantially more views than other videos posted during September 2014 and April 2015 with the next most viewed video an advertisement for Sportsbet Live Racing (37,825 views).

3.3.2 Twitter

Five prominent types of creative strategies were used in tweets.

1. Games Statistics/news/ Commentary
2. Wagering promotions and Information
3. Comedy/Satire
4. Cartoon
5. Nostalgia/History
The two most commonly used creative strategies were tweets that provided either commentary on a game (including statistics or news about a game), or information about wagering (Table 3.3.2.1). Most brands used Twitter to comment on sporting matches in real time as they occurred, often using the hashtag (#) relating to the game. A range of different strategies were used to embed commentary into the game. These included tweets about game statistics; comedy tweets; and news about upcoming games. For example, Image 3.3.2.1 from the @tabcomau Twitter account provides commentary on the AFL’s West Coast Eagles win over the Brisbane Lions. The tweet also uses a ‘meme’ using an image from the Lion King to highlight the Brisbane Lions’ last place on the AFL Premiership Ladder.

Table 3.3.2.1
Twitter Creative Strategy (April 24th, 25th and 26th, 2015)

<table>
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<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Games Statistics/news/Commentary</td>
<td>32</td>
<td>30</td>
<td>23</td>
<td>60</td>
<td>28</td>
<td>9</td>
<td>60</td>
<td>242</td>
</tr>
<tr>
<td>Wagering promotions and Information</td>
<td>23</td>
<td>41</td>
<td>39</td>
<td>37</td>
<td>25</td>
<td>4</td>
<td>40</td>
<td>209</td>
</tr>
<tr>
<td>Comedy/Satire</td>
<td>2</td>
<td>2</td>
<td>92</td>
<td>12</td>
<td>0</td>
<td>0</td>
<td>18</td>
<td>126</td>
</tr>
<tr>
<td>Cartoon</td>
<td>0</td>
<td>0</td>
<td>9</td>
<td>5</td>
<td>0</td>
<td>0</td>
<td>24</td>
<td>38</td>
</tr>
<tr>
<td>Nostalgia/History</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>3</td>
<td>3</td>
</tr>
</tbody>
</table>

*Content only available for 24th/25th April 2015
+Tweets could include more than one creative strategy

Image 3.3.2.1: Example of Tweet Featuring Game Commentary
https://twitter.com/tabcomau (25/4/15)
Twitter creative strategies often used multiple media sources and strategies – including match commentary and comedy. For example, the tweet below (Image 3.3.2.2) demonstrates how Sportsbet.com.au uses multiple approaches during its tweet. The use of pictures and videos draws additional attention to the text of the tweet, providing additional exposure for the brand.

- Commentary on the game: “Storm lose to Manly”
- Embedding the commentary within the games twitter stream: #NRLStormManly
- The use of textual and visual reference to an athlete – David Williams
- The use of comedy or satire: “Manly likely to lose David Williams to a hip Melbourne city café barista gig”.

![Image 3.3.2.2: Use of multiple creative strategies in a tweet](https://twitter.com/sportsbetcomau (25/4/15))

Some tweets also provided information about wagering promotions related to games. For example, the following tweet provides a link to Ladbrokes’ NRL Betting webpage, with information about an NRL Cash Back offer embedded into the tweet, and utilising the #NRLPanthersSharks and #NRL hashtags (Image 3.3.2.3).
In another example, in Image 3.3.2.4, Sportsbet.com.au provides additional information about a wagering promotion relating to AFL teams Geelong and North Melbourne. The inclusion of the picture (including cartoon characters) and a web link embedded more information about the wagering promotion into the tweet.

Image 3.3.2.4: Wagering Promotion via Pictures Embedded into Tweets
https://twitter.com/sportsbetcomau (25/4/15)
3.3.3 Facebook

Seven main creative strategies were used on Facebook (Table 3.3.3.1).

1. Wagering information
2. Game statistics/ news/ commentary
3. Fan engagement
4. Comedy/ satire
5. Tribute
6. Cartoon
7. Nostalgia/ history

Table 3.3.3.1
Facebook Creative Strategy (September 2014/April 2015)

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</tr>
</thead>
<tbody>
<tr>
<td>Wagering Information</td>
<td>24</td>
<td>30</td>
<td>5</td>
<td>20</td>
<td>6</td>
<td>34</td>
<td>14</td>
<td>126</td>
</tr>
<tr>
<td>Games Statistics/ news/ Commentary</td>
<td>23</td>
<td>10</td>
<td>8</td>
<td>24</td>
<td>2</td>
<td>35</td>
<td>14</td>
<td>116</td>
</tr>
<tr>
<td>Fan engagement</td>
<td>23</td>
<td>14</td>
<td>6</td>
<td>8</td>
<td>34</td>
<td>22</td>
<td>7</td>
<td>114</td>
</tr>
<tr>
<td>Comedy/ Satire</td>
<td>0</td>
<td>6</td>
<td>42</td>
<td>19</td>
<td>3</td>
<td>1</td>
<td>19</td>
<td>90</td>
</tr>
<tr>
<td>Tribute</td>
<td>4</td>
<td>2</td>
<td>1</td>
<td>8</td>
<td>3</td>
<td>12</td>
<td>7</td>
<td>37</td>
</tr>
<tr>
<td>Cartoon</td>
<td>11</td>
<td>4</td>
<td>7</td>
<td>5</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>29</td>
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<td>Nostalgia/ History</td>
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<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
</tbody>
</table>

*Data was only available for April 2015
+Posts could include more than one creative strategy

The most frequently used creative strategy was posts that contained wagering information (n=126). The second most frequently used creative strategy was posts directly related to sporting events or horse races (n=116). This included commentaries on games, updating scores or outcomes, or race previews (Image 3.3.3.1).
The third most frequently used creative strategy sought to actively engage fans with the content of the post (n=114). For example brands asked users to tag their friends in posts, or comment on whether or not selectors had chosen the right teams. The fan engagement strategy was most commonly used by TomWaterhouse.com.au; Crownbet.com.au; Unibet.com.au and Ladbrokes.com.au (Image 3.3.3.2)
3.4 Wagering promotions

The following section presents results relating to the range of different wagering products and services promoted across the social media platforms.

3.4.1 YouTube

YouTube wagering promotions were classified into ten categories: Including a responsible gambling message; odds; tipping; mobile betting; prompts to bet; refund information; live betting; bonus bets; cash out; and winner’s information (Table 3.4.1.1). Videos may have contained more than one wagering promotion.

The most utilised wagering promotion was the promotion of odds (n=69), although the majority of odds promotions were from Crownbet.com.au (n=47) and Tab.com.au (n=16). Crownbet.com.au also utilised panel based discussions to give game tips (n=46) whilst providing game odds (n=47) from former AFL athletes Wayne Carey and Campbell Brown.

Mobile betting was mentioned 34 times across the videos, with specific emphasis placed on product features. YouTube videos also contained prompts to bet (n=28), with slogans such as ‘Bet now’ utilised within videos. Fifteen videos provided information about refunds (n=13) or cash out (n=2) relating to specific betting events. These two strategies were most commonly used by Ladbrokes.com.au (refund information) and Sportsbet.com.au (cash out).

We also analysed the extent to which certain words or phrases were used throughout YouTube content (spoken and visually on screen). Three themes were emphasised consistently throughout the promotional activities. The first was words that related to winning (including win, winning and winner) which were used 354 times in the videos. The vast majority of these were used both verbally and visually in Crownbet.com.au promotions (n=254), with one of the promotional campaign called “Pick a Winner”. Second, the word ‘value’ was frequently used throughout promotions (n=103) (Image 3.4.1.1), most commonly by Ladbrokes.com.au (n=72). Third, the word ‘bet’ was used 93 times during the clips, most commonly by Crownbet.com.au (n=47) and WilliamHill.com.au (n=33).
Table 3.4.1.1

YouTube Wagering Promotion Content (September 2014/April 2015)

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</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(n=51)</td>
<td>(n=15)</td>
<td>(n=6)</td>
<td>(n=16)</td>
<td>(n=5)</td>
<td>(n=3)</td>
<td>(n=96)</td>
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<td>75</td>
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<td>Odds</td>
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<td>16</td>
<td>4</td>
<td>0</td>
<td>69</td>
</tr>
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<td>Bonus bet</td>
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<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>Cash Out</td>
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<td>0</td>
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<td>0</td>
<td>0</td>
<td>0</td>
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<td>0</td>
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<td>42</td>
<td>38</td>
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<td></td>
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<td></td>
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<td></td>
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<td></td>
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<td></td>
<td></td>
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<tr>
<td>Number of times</td>
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<td>1</td>
<td>2</td>
<td>1</td>
<td>9</td>
<td>33</td>
<td>93</td>
</tr>
<tr>
<td>‘Bet’ mentioned</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Brand did not exist in September 2014
** Content only available for April 2015
*** Content only available for September 2014
+Videos could include more than one type of wagering promotion

Image 3.4.1.1: Written representation of ‘value’ and ‘bet’ during video

https://www.youtube.com/watch?v=PyUoSVCPjXc (4/9/14)
Responsible gambling messages appeared across YouTube content (n=75), although these were mainly in television commercials. The exception was Crownbet.com.au where a ‘Gamble Responsibly’ message appeared in a ticker rolling across the bottom of some of their promotional videos (n=55) (Image 3.4.1.2).

Image 3.4.1.2: An example of responsible gambling message portrayed in Crownbet.com.au’s video
https://www.youtube.com/watch?v=NdMFKu86mTo (23/4/14)

3.4.2 Twitter

Twitter based gambling promotions were classified into nine categories: Prompts to bet; odds information; refund information; bonus bets'; tipping; responsible gambling message; winner’s information; cash out; and multi-bets.

The largest form of promotion via Twitter was tweets which prompted individuals to place bets (n=98) (Table 3.4.2.1), most commonly used by Ladbrokes.com.au (n=25); Sportsbet.com.au (n=23); and WilliamHill.com.au (n=20). Promotions used a range of mechanisms to encourage individuals to place bets on matches or codes. For example, some tweets used fans’ passion for a particular sporting code to encourage betting. Image 3.4.2.1 show a tweet from tab.com.au a tweet from @tabcomau which asks fans if they had “been looking forward to #AFLCatsNorth? Check out our H2H offer before you get your #AFL bet on".
### Table 3.4.2.1

**Twitter based Wagering Promotion**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Prompt to bet</strong></td>
<td>15</td>
<td>25</td>
<td>23</td>
<td>13</td>
<td>1</td>
<td>1</td>
<td>20</td>
<td>98</td>
</tr>
<tr>
<td><strong>Odds</strong></td>
<td>16</td>
<td>25</td>
<td>14</td>
<td>2</td>
<td>10</td>
<td>5</td>
<td>20</td>
<td>92</td>
</tr>
<tr>
<td><strong>Refund Info</strong></td>
<td>0</td>
<td>8</td>
<td>19</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>9</td>
<td>36</td>
</tr>
<tr>
<td><strong>Bonus Bet</strong></td>
<td>17</td>
<td>5</td>
<td>0</td>
<td>12</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>34</td>
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<tr>
<td><strong>Tipping</strong></td>
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<td>0</td>
<td>0</td>
<td>2</td>
<td>9</td>
<td>1</td>
<td>11</td>
<td>31</td>
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<td><strong>Responsible gambling message</strong></td>
<td>8</td>
<td>0</td>
<td>6</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>16</td>
</tr>
<tr>
<td><strong>Winner’s Information</strong></td>
<td>1</td>
<td>4</td>
<td>0</td>
<td>3</td>
<td>1</td>
<td>0</td>
<td>3</td>
<td>12</td>
</tr>
<tr>
<td><strong>Cash Out</strong></td>
<td>0</td>
<td>0</td>
<td>3</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>5</td>
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<td><strong>Multi</strong></td>
<td>0</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>5</td>
</tr>
</tbody>
</table>

*Content only available for 24th/25th April 2015
+ Tweets could include more than one type of wagering promotion

---

*Image 3.4.2.1: Twitter example of a prompt to bet*

https://twitter.com/tabcomau (26/4/15)

Odds based information was also a common promotional strategy used in tweets (n=92), and was often combined with prompt to bet strategies. For example, the following tweet from ladbrokes.com.au provides odds for an AFL football match telling individuals that it is "not too late to get on board" (Image: 3.4.2.2).
A number of ‘specials’ were also advertised. These most commonly comprised refund information (n=36) and bonus bets (n=34), for example, providing incentives to gamblers if their teams led during a game break, but eventually lost (Image 3.4.2.3). Tweets also used the game hashtags to signpost the tweet to those following the game.
Brands also used refund information to indicate how much they had ‘given back’ to gamblers during matches based on money back specials. These tweets portrayed refunds as a ‘win’ for gamblers who had lost on bets. For example the following tweet from sportsbet.com.au highlights that they had refunded $163,000 from AFL and NRL matches with the word “Ka-ching!” used in the tweet (Image 3.4.2.4).

Image 3.4.2.4: Refund promotions
https://twitter.com/sportsbetcomau (25/4/15)

Only 16 tweets (less than 3%) contained a message about responsible or problem gambling. Very few of these messages were embedded within tweets featuring wagering promotions. However, some brands did post tweets relating to help services, counselling or responsible gambling. The most common were from the @sportsbet.com.au twitter account, which promoted links to websites for those requiring information about responsible or problem gambling (Image 3.4.2.5). These tweets were primarily text based, with no other visual information.

Image 3.4.2.5: Example of Tweet Relating to Responsible or Problem Gambling
https://twitter.com/sportsbetcomau (26/4/15)


### 3.4.3 Facebook

Similarly to Twitter promotions, Facebook gambling promotion strategies included: Prompts to bet; tipping; odds information; insider information; responsible gambling message; competitions; refund information; winner’s information and; multi-bets (Table 3.4.3.1). The most used gambling promotions on Facebook were prompts to bet (n=58) and tipping (n=57). Most tipping promotions were from Unibet.com.au (n=35).

These promotions were presented in a similar way to that on Twitter. However a distinguishing feature of Facebook posts was the focus on betting tips from ex-athletes. This was particularly prominent in Crownbet.com.au posts (n=16).

| Table 3.4.3.1 Facebook based Wagering Promotion (September 2014/April 2015) |
|---------------------------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| Prompt to bet | 8 | 20 | 0 | 6 | 4 | 18 | 2 | 58 |
| Tipping | 17 | 1 | 0 | 0 | 1 | 35 | 3 | 57 |
| Odds | 18 | 6 | 1 | 2 | 0 | 7 | 1 | 35 |
| Insider | 16 | 0 | 1 | 0 | 5 | 3 | 6 | 30 |
| Responsible gambling message | 7 | 3 | 4 | 10 | 1 | 0 | 1 | 26 |
| Competition | 7 | 7 | 4 | 5 | 0 | 0 | 0 | 23 |
| Refund Info | 0 | 13 | 5 | 0 | 0 | 4 | 0 | 22 |
| Winner’s Information | 3 | 0 | 0 | 10 | 0 | 0 | 2 | 15 |
| Multi | 0 | 2 | 0 | 10 | 0 | 0 | 0 | 12 |

*Content was only available for April 2015
+Posts could include more than one type of wagering promotion

### 3.5 Appeal Factors

The social media strategies used by the wagering industry were classified against two pre-developed coding frameworks to examine the range of appeal strategies within the promotions. In particular, we were interested in how promotions may appeal to adults, and young people. Prior research has established that some strategies may have particular appeal for young people. These include promotions that feature humour, sound, cartoons, animals, stories, sexual success, social success, sporting success, colours, words or text, simple messages, and where children may perceive that things are free or inexpensive, or create notions of ‘winning’ [Pitt et al, in preparation]. Table 3.5.1 uses this framework to classify the social media appeal strategies used by the wagering industry and shows that a
number of strategies are used may appeal to children. These include the use of colours (n=68), words/text (n=51), messages relating to sporting success (n=42) and using celebrities to promote products and brands (n=31).

Table 3.5.1

YouTube sports wagering marketing themes that may appeal to children

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<thead>
<tr>
<th></th>
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<th></th>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Winning/Win (number of ads that mention in any way winning/win)</td>
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<td>8</td>
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<td>16</td>
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<td>2</td>
<td>78</td>
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<td>1</td>
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<td>0</td>
<td>68</td>
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<tr>
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<td>0</td>
<td>51</td>
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<td>0</td>
<td>0</td>
<td>0</td>
<td>42</td>
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<tr>
<td>Celebrities</td>
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<td>31</td>
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<td>Sound (music/noises/voiceovers)</td>
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<td>Free/cheap/money back</td>
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<td>0</td>
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</tr>
</tbody>
</table>

*Totals could include more than one answer

Secondly, we explored themes that may appeal to adults. We used a pre-existing coding framework to investigate specific themes within promotions relating to sporting symbols and social success [Deans et al, in preparation]. Social media strategies of the wagering industry were interpreted according to this framework and the results are presented in Table 3.5.2. The key themes identified relate to sports fan/punter behaviours (n=17), gender stereotypes (n=6) and mateship (n=5). Results also show that the brand using these types of strategies most often is Sportsbet.com.au (n=14) which had more than double the instances of these strategies than any of the other brands.
Table 3.5.2

YouTube sports wagering marketing themes relating to sporting symbols and social success

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<td>6</td>
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<td>Power and control</td>
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<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

*Totals could include more than one answer

3.6 Popular videos

The analysis thus far provides insights into the social media activity of wagering brands in specific months in 2014 and 2015. However, it was evident during the process of analysis that there were other instances of social media activity that were very highly viewed and shared but were outside the timeframes selected for this analysis. Given the identified potential for YouTube clips to appeal to and be viewed by children and adults, we identified the top four viewed YouTube clips for three wagering brands: Crownbet.com.au, Sportsbet.com.au and WilliamHill.com.au, to examine the content of those videos that had been shared and watched most frequently on this widely available social media platform.

Results are presented in Table 3.6.1 and show that the most popular clips for wagering brands include both TV advertisements which include responsible gambling messages, and non-TV clips which in most cases do not contain this message. Some of the clips have been viewed hundreds of thousands of times, including the two non-TV videos posted by Sportsbet.com.au which have been viewed over 390,000 and 380,000 times in the past 10 months and four months respectively.
The creative strategies used by the most popular YouTube videos are shown in Table 3.6.2. In all videos, visual representations of the wagering brand are shown multiple times, and in all but two the brand is presented verbally as well. All of the videos feature some association with sport and over half visually include the brand of a recognised team or sporting code. In terms of wagering-related content, betting, mobile betting and winning were the most common themes with these appearing in at least half of the videos analysed. The next most common wagering messages related to odds generally or the offer of better odds, tipping information, expert commentary and encouraging immediate action or quick betting, with each of these strategies appearing in three of the 12 most popular videos. Notably, the two most popular videos (the non-TV ads from Sportsbet.com.au) did not include any overt wagering-related content, but instead used humour and sports to build positive associations with the brand.
Wagering promotions on social media: An analysis of marketing content on YouTube, Twitter, and Facebook.
Thomas et al. 2015

### Table 3.6.2

**Branding and Wagering Content**

<table>
<thead>
<tr>
<th>CONTENT</th>
<th>CROWNbet</th>
<th>SPORTSBET</th>
<th>WILLIAM HILL</th>
</tr>
</thead>
<tbody>
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<td>The game just changed</td>
<td>50K R1 quick cash tipping</td>
<td>Pick a winner round 1 extra</td>
<td>Mobile app bad reception</td>
</tr>
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<td></td>
<td></td>
</tr>
<tr>
<td>Company name/logo audio</td>
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<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Company name/logo - visual</td>
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<td>3</td>
<td>9</td>
</tr>
<tr>
<td>Sports association</td>
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<td>AFL</td>
<td>AFL</td>
</tr>
<tr>
<td>Team/code brand shown</td>
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<td>Yes</td>
<td>Yes</td>
</tr>
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<td>Wagering content</td>
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</tr>
<tr>
<td>Win/winner/ winning</td>
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<td>6</td>
</tr>
<tr>
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<td>3</td>
</tr>
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</tr>
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<tr>
<td>Better odds</td>
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<td>Yes</td>
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<tr>
<td>Superior/advanced product</td>
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<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Tipping</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Expert advice/commentary</td>
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<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Impulse betting/quick action</td>
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<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Social/group betting</td>
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</tr>
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<tr>
<td>Responsible gambling message</td>
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</table>
Discussion

This report sought to examine the extent and nature of the marketing of wagering on social media platforms. We examined the differences between and across wagering companies and social media platforms. Findings show that social media marketing for wagering products have added a new dimension to the way wagering is promoted to audience segments.

Social media is a relatively new phenomenon. It will therefore be important to address current concerns about promotion and normalising of wagering through social media, but also to set in place appropriate strategies to monitor and address future developments.

Based on these findings, we recommend that the foundation and those it informs be especially aware of the following ten themes:

1. The high volume of messages on some social media platforms (in particular Twitter), and the link between these messages and live sporting events.
2. The complex range of promotional strategies used within and across social media channels.
3. The use of marketing strategies (such as humorous videos or game commentaries) which consumers may not clearly understand or distinguish as promotions.
4. The use of videos that may promote content featuring alcohol consumption, risky behaviours, or standards deemed unacceptable by Australian society, and which also feature logos for the wagering company.
5. The use of Corporate Social Responsibility strategies that also promote wagering brands.
6. The co-branding of wagering promotions by sporting organisations, codes and athletes.
7. The promotion of special offers – in particular cash back, bonus bet or refund promotions - that may lead to a perception that there is a reduced risk of loss. These promotional offers may be particularly problematic when reinforced in real time during sporting matches.
8. The use of words or phrases that may promote perceptions of winning and value.
9. The use of strategies that may appeal to young people – in particular cartoons, memes, or celebrity endorsements within wagering promotions.
10. The lack of comprehensive harm minimisation messaging within social media promotional strategies.

1. The quantity of promotional messages on social media platforms

Results highlight the extent of promotional messaging on social media, particularly on Twitter, with one company averaging over 50 tweets per day. Many of these tweets also used game-related hashtags, thus directly linking tweets with sporting matches. We hypothesise that these tweets also target sports fans that may be watching the game and also engaging in commentary about the game via social media platforms. These real time promotions via Twitter...
also offer the opportunity to attract the attention of potential gamblers at times when they might not otherwise be considering betting.

This raises the questions about the extent to which social media marketing strategies may avoid regulations which prevent ‘whistle to whistle’ marketing during televised sporting content, and may allow wagering promotions to be offered in real time during matches. Furthermore, the commentary-based creative strategy used by some wagering companies (for example providing commentary on aspects of the game) may blur the boundary between expert commentator and wagering provider. Restricting the number, content and timing of promotional messages on Twitter should be considered.

2. The range of promotional strategies used across social media platforms

A second finding relates to the range of strategies used by the wagering industry on social media platforms. Based on the results above relating to promotional strategies, a typology was developed to graphically illustrate the strategies used by the wagering industry (Figure 1). In this Figure, green shapes represent the content, creative strategy and types of promotions used on YouTube, red shapes show the same for Twitter and blue shapes represent Facebook.

The typology reveals some variation in the content depending on the social media platform used. Facebook used a combination of videos, advertisements, pictures, text and links to other websites, and Twitter used similar strategies other than advertisements. YouTube is a video-based platform and clips include various types of videos such as advertisements, funny videos, stunts, wagering promotions, sports commentary and clips relating to Corporate Social Responsibility activities.

In terms of the creative strategies used, all three platforms used humour, nostalgia, games, statistics and cartoons. In addition to these, tributes and themes associated with fan engagement appeared on YouTube and Facebook, news articles and players/celebrities featured on YouTube and wagering information appeared on Twitter.

All three platforms featured promotions focused on the themes of sports and wagering. Sporting promotions included national and international sporting codes and horse racing. Wagering-related promotions included a wide range of wagering products, with all three platforms promoting refunds, tipping, betting promotions, odds, prompts to bet, winning and responsible gambling messages.

Using pre-developed typologies, YouTube videos were also analysed to assess the extent to which clips included features known to appeal to children and adults (shown in the two far green columns in the typology). Multiple features known to appeal to children were identified, including the use of humour, sounds, animals, colours, celebrities and words and/or text. Common themes related to sporting success, winning, and products associated with value. There was also evidence of the use of symbolic and ritualistic messages that appeal to adults. This includes use of sexualised imagery and gender stereotypes, and themes of mateship, winning, adventure and happiness. Messages also commonly featured images of fans and focused on typical fan and/or punter behaviour.
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3. The use of promotional strategies that may not be clearly recognised as marketing

We identified a number of promotional strategies that may not be clearly recognised by consumers as marketing promotions or advertisements. Most commonly these included humorous videos which, on the surface, appeared unrelated to the wagering brand, however subtle branding was displayed throughout the clip, for example in the background or on products which appear in the video.

This strategy, generally referred to as product placement, is commonly used to build positive brand associations amongst consumers without overtly calling for product consumption. This is perhaps even more commonly seen with brands associated with dangerous consumption products which in themselves can have negative associations amongst the public. This approach serves to elicit a positive response in the viewer, for example laughter and amusement, which in turn builds positive associations with the brand and encourages product consumption at a later time.

Promotions of this nature enable the brand to be communicated to an audience who may not apply the usual cognitive defences that they would do when viewing advertisements which they know are trying to persuade them. While this type of strategy was found across all three social media platforms, the most viewed and shared promotions of this nature were on YouTube.

4. The content of videos that may push social acceptability boundaries and which also contain brand logos

The fourth finding of this study relates to the social acceptability of some promotional content, particularly on YouTube industry channels. Although commercials promoting gambling and gaming must comply with the Commercial Television Industry Code of Practice, clauses 6.14–6.14.2, as well as Commonwealth, State or Territory legislation which relates to gambling and gaming, there are no such restrictions on YouTube video promotions which are seen to fall outside traditional advertising content.

Of particular concern were promotions featuring wagering companies’ logos, but which did not explicitly promote wagering. These videos, predominantly from wagering provider Sportsbet.com.au, had high user engagement via YouTube. The presence of logos within these videos suggests that whilst they are not directly promoting gambling, they are still promoting wagering brands. We recommend that these videos should be classified in the same way as other advertising promotions.

5. The use of Corporate Social Responsibility promotions

Research shows that Corporate Social Responsibility (CSR) strategies are used as promotional activities to enable companies to align themselves with social causes [Richards et al, 2015]. Public health researchers have documented the use of these tactics in other unhealthy commodity industries (such as tobacco, alcohol and junk food) as a way of distracting consumers from potentially negative impacts of their products [Richards et al, 2015; Dorfman et al, 2012]. Questions have also been raised about the use of these programs to promote specific brands and products. There is limited research evidence relating to CSR tactics used by the wagering industry. In this study, we identified an example of a YouTube video which promoted a CSR initiative (Sportsbet.com.au’s “World’s Biggest Blue Balls” promotion). Of importance for public health practitioners was the way in which the initiative promoted the wagering brand, with 18 presentations of the Sportsbet.com.au logo within the 58 second clip. Further research is required into the way in which CSR tactics are used by the wagering industry to promote its brands, and the impact these activities have on community perceptions. To our knowledge, there is no research examining the CSR strategies of the wagering industry, including the key approaches taken and messages promoted.
6. The co-branding of wagering promotions by sporting organisations, codes, and athletes

Our research has identified that where there were sponsorship links between the wagering industry and sporting clubs or codes, there was also the likelihood that promotions were co-branded between these entities. The most overt example of this was in Crownbet.com.au YouTube videos, in which the AFL.com.au logo was clearly present. Similarly, the logo for the Carlton Football Club was clearly visible within some WilliamHill.com.au promotions. This potentially sends confusing messages to consumers about the endorsement of wagering products by sporting codes. There is an ethical tension for sporting codes and teams which on the one hand promote themselves as family friendly, and on the other hand actively endorse adult products may be harmful for communities and children.

It is possible that these types of endorsements may contribute to the belief that wagering is a normal activity for individuals to engage in while they are watching sport. Of particular concern is the use of current or ex-athletes, some of whom also participate in the commentary of games, to promote and endorse wagering brands and their products.

Our study identified that the vast majority of tweets related to the two main Australian Football codes, the NRL and AFL. While this may be partly due to the timing of this study sampling period (at the start and end of the football seasons), sporting codes should be aware of the extent to which their codes, teams, and athletes are featured within wagering industry promotions. For this reason, it is important that sporting codes, teams and athletes accept greater responsibility for the real or implied relationships between their brands and the wagering industry. This includes monitoring the use of images of athletes in promotional activities by the wagering industry and advocating for an end to this practice. In this case, there may also be a role for player unions (such as the Australian Football League Players Association) or managers, to advocate for images of athletes in social media promotions to be only used with the athletes consent.

The use of celebrities (such as current and ex-athletes) in endorsements for unhealthy commodity products can lend credibility to a brand and influence the way it is perceived. Research has identified that the use of celebrities is an influencing factor in marketing to children [Watson, Clarkson, Donovan, & Giles-Corti, 2003; Paek, Kim, & Hove, 2010; Thomas, 2014]. Policy makers should continue to monitor the impact of these marketing strategies on the gambling attitudes and consumption intensions of children, taking regulatory action where necessary.

7. The promotion of special offers that may lead to perceptions of reduced risk of loss

A range of marketing strategies were identified that may reduce the perception of risk associated with gambling. These strategies included the promotion of bonus bets which give punters extra bets when they place the required number of bets, cash out promotions which give individuals the chance to cancel their bets up until a certain point in the game, and refunds which commit to giving punters their money back under certain circumstances. Each of these products may build the perception that individuals are unlikely to lose and that they are receiving greater value for money from their original outlay. This effectively counters concerns punters have that they may lose their money.

We recommend consideration be made as to whether these types of promotions have a similar impact on the attitudes and gambling intentions of consumers to those of other incentives and inducements that have been banned by some State governments.

8. The use of phrases and words that may promote perceptions of winning and value

The terms “winning” and “value” were repeated in various forms during many of the promotions. This strategy of repeating advertising messages is commonly used in marketing and relates to the notion of “effective frequency”, which is the number of times an individual must be exposed to a message
before the desired response is achieved. In the case of wagering, it may be that the reinforcement of messages relating to winning and value will lead to a belief that this is the likely outcome of gambling and ultimately result in individuals consuming gambling products.

9. Promotional strategies that may have particular appeal for young people

Findings reveal that various creative strategies are used by wagering companies on social media platforms that are known to be appealing to children and young people [Pitt et al., in preparation]. These strategies include:

1. Humorous and stunt videos which also contain logos for sports betting companies, and are particularly common on YouTube channels.
2. The use of cartoons and memes, particularly common on Twitter and Facebook.
3. The use of celebrity/athlete endorsement of products, particularly within YouTube promotions.
4. The co-branding of wagering promotions by sporting organisations and codes, particularly on YouTube and Facebook.

International research suggests that children have high exposure to gambling advertising via a range of media platforms [Derevensky et al., 2007; Derevensky, Sklar, Gupta, & Messerlian, 2010; Korn, Hurson, & Reynolds, 2005]. These studies also suggest that children and adolescents have high recall of brands, slogans and jingles within these promotions [Korn, Hurson et al., 2005; Thomas, 2014]. A recent Australian report highlighted that children perceive that advertising promotions using athletes may be particularly influential in encouraging children to have positive attitudes towards gambling [Thomas, 2014]. However, there has been limited research investigating the role of social media promotions in relation to children’s gambling attitudes and consumption intentions. Given that statistics show that 90% of young people between 12–17 years and 97% of those aged 16 and 17 years use social networking services [ACMA, 2009], this is an important area for future research.

Our study suggests that a range of promotional creative strategies used by wagering companies may potentially appeal to young people. In relation to humour, previous studies have documented the effectiveness of humour in advertising, showing that emotionally arousing and humorous ads tend to be more successfully recalled [Lang, Dhillon, & Dong, 1995]. When advertisements combine humour with executional cues such as music, charming vignettes and attractive models, they evoke positive emotional effects such as excitement, happiness and warmth [Rajeev & Michael, 1986].

It is possible that the use of cartoons within wagering promotions pose an increased risk of appeal for children, given their known high appeal for young people [Nash, Pine & Messer, 2009]. Our study provides evidence of various cartoon characters used in promotions from wagering companies. These ranged from the use of cartoon mascots in wagering promotions through to the use of popular cartoon characters (such as The Simpsons and The Lion King). Research in other areas of public health has clearly shown that the use of cartoon characters plays a role in increasing consumption, attitudes and intentions in young people. For example, the use of the cartoon character Joe Camel single-handedly increased the market share for Camel cigarettes from 0.5% of adolescent smokers to 32% [Difranza et al. 1991]. Given this evidence, we recommend that the use of cartoons by wagering companies is an area for immediate attention with a view to regulation.
10. The lack of comprehensive harm minimisation and prevention messaging

Finally there is need for further consideration of the lack of gambling harm prevention messaging within social media promotions. Few promotions were identified that included comprehensive harm minimisation or prevention messaging. Where ‘responsible gambling’ or ‘help seeking’ messages were used, these were often minimal. It is important to note that where there are such messages on social media, they do not appear to be based on any evidence or research about optimal approaches to messaging that may be likely to minimise gambling harm.

Furthermore, responsibility messaging was considerably less visually appealing than commercial marketing for the product. While wagering promotion messages, particularly on Twitter, contained a range of visual imagery to attract users, responsible gambling messages were textual and required users to click to another website for further information. Predefined gambling harm messages should be developed by government, independent of the wagering industry, with minimum standards for use in social media content clearly defined. For example, a quota system could be used whereby one in every five tweets must be a predefined mandated message about gambling harm. This approach was shown as long ago as the late 1960s to be effective in curbing tobacco promotion, when under the “Fairness Doctrine” of the time, US tobacco companies were required to fund the airing of TV and radio anti-smoking advertisements, primarily from the American Cancer Society. After three years of this approach, and a decline in smoking, tobacco companies voluntarily sought an end to TV tobacco advertising, which also ended the airing of anti-smoking advertisements at levels that would otherwise not have obtained. This measure was widely credited as playing a major role in reducing smoking at the time, as well as preventing further tobacco promotion.

We would emphasise that any messages aimed at reducing harm should be developed independently of the wagering industry, and should be introduced following appropriate research. There is evidence from tobacco, alcohol and junk food that messages developed by the industries and those associated with them are likely to be ineffective. In this context, it will be valuable to research the impacts of messages to consumers about “responsibility” or “responsible gambling” which may have relevance in a policy context, but may not be appropriate for public education purposes. There is now a strong base of research understanding from other areas of health that could be harnessed to help develop appropriate messages for gambling.
Conclusion: Recommendations

Given the findings presented in this report, we recommend that the following initiatives are considered by the foundation, governments, health and social organisations, community groups and other organisations to address social media marketing strategies. We would note that it is important that these initiatives are undertaken independently from the wagering industry, whose primary aim is to promote the use of wagering products, and that they are seen as part of a comprehensive approach to addressing gambling problems in Australia.

The first is to increase public knowledge and awareness of the marketing of wagering on social media channels. This includes the extent of wagering promotion through social media, the potential implications for gambling harm, the potential impacts of exposure on young people’s gambling attitudes and behaviours. This public awareness raising may also prompt discussion about more adequate regulatory frameworks for the promotion of gambling on social media platforms.

The second is to increase awareness amongst policy and decision-makers and regulators in relation to the marketing of wagering on social media platforms, and the potential impact of marketing strategies on different audience segments. Policy forums and working groups comprised of experts independent of industry can assist in formulation of recommendations aimed at preventing harm across these audience segments. This should include a focus on standards relating to the quantity, content and placement of social media promotions.

The third is to develop research structures that are able to map and monitor over time the tactics used by the wagering industry to promote their products on social media. These monitoring structures will allow policy makers to be continually informed of changes in marketing strategies, and the emergence of new strategies in the light of the rapidly evolving nature of this communications medium.

Fourth is to engage sporting organisations in discussions about wagering promotions and sponsorship, including how promotions may influence gambling attitudes and behaviours, particularly in vulnerable populations such as children. While sporting codes may argue that wagering sponsorship is a commercial reality for clubs, it is worth noting that when tobacco sponsorship of sport ended, there were predictions that this would lead to a catastrophic lack of funding for sport. However, the reality was that with time and effort, sporting organisations found alternative sponsors including partnerships with non-government organisations that aimed to promote health and wellbeing.

Fifth, we recommend dialogue with social media companies (YouTube, Facebook, Twitter) about their roles and responsibilities in relation to curbing creative strategies that may appeal to, or may influence the gambling attitudes and consumption intentions of, children and young people.
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