

**RESEARCH  
REPORT**

# **Brand community and sports betting in Australia**

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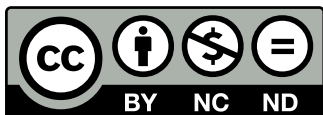
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The authors declares no conflict of interest in relation to this report or project.

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## Executive summary

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This project explores the presence and use of brand community in relation to sports betting. This is an important area of inquiry given the increase in gambling marketing in Australia, as research examining its potential impact is only recently emerging. Brand community is a community of consumers formed on the basis of affection for and connections to a particular brand. Three key markers of brand community have previously been identified. These are consciousness of kind (e.g. a sense of togetherness between consumers in the community), rituals and traditions (customs associated with consumption of the brand), and shared moral responsibility (integrating members into, and fostering a sense of sympathy between consumers in the community). The study explores the presence and meanings of these markers of brand community in relation to sports betting marketing, how they may engage young adult gamblers, and then examines the responses of a sample of gamblers. A mixed methods approach was used. A content analysis of contemporary sports betting marketing on sports websites, and during live footage and sports (the National Rugby League [NRL] and Australian Football League [AFL]) competitions was undertaken to identify and analyse brand activity displaying markers of brand community.

Following the content analysis, exploratory focus group research with young adult gambler (18-30 years) friendship groups in urban and regional Victoria discussed and explored their awareness and responses to sports betting marketing including markers of brand community, the relationships between sports betting brands and sport, and explored their socialising and consumption practices surrounding gambling. The focus group research also involved use of projective activities such as identifying masked and unmasked sports betting brands, and mapping their perceptions towards these brands to gain insight on consumer responses to sports betting brands. The findings offer valuable insight and understanding of how contemporary sports betting marketing uses markers of community to promote brands, and how consumers respond to and interact with sports betting brands. Our findings from the content analysis research suggest that sports betting marketing appears to be heavily embedded within community cultures surrounding sport – often using language identifying with the game, identifying with the rituals and traditions, and identifying with the sense of togetherness and belonging often present in sports. The focus group research with consumers identified that participants were often highly aware of, and engaged by, such sports betting brand community activities. The study suggests that gambling marketing had a role in socialising consumers to sports betting. Therefore, researchers and policy makers should focus on how sports betting marketing, and the embedded nature of sports betting brands within Australian sport, creates consumption communities around gambling, and consider what the social and policy implications are from this.

## Background

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### Introduction

Gambling is an activity that has a very long history (Downs, 2010), and is a prominent feature of most cultures (McMillen, 2005). Gambling is a major feature of Australian society, and it has been estimated that over 80% of adults engage in gambling at some stage in their life (Bryant, 2007). Gambling expenditure in Australia was estimated at \$19 billion in 2008-2009, an average of \$1500 per adult who gambled (Productivity Commission, 2010). Many forms of gambling such as playing 'pokie' machines, or sports betting, have considerable health and social impacts on individuals, families, and communities such as financial hardship, family breakdown, headaches and nausea, stress, anxiety, and depression (Catford, 2012). It is estimated that there are between 80,000 and 160,000 Australian adults suffering severe problem gambling. In addition there are between 250,000 and 350,000 at moderate risk of problem gambling. The social cost of problem gambling in Australia is estimated at \$4.7 billion per annum (Productivity Commission, 2010). Increasing focus has been placed on examining young people and gambling. Approximately 50% of young Australians participate in gambling (such as card games, instant lottery tickets, or electronic gaming machines) by the age of 15 years, increasing to 76% by age 19 (Productivity Commission, 2010). It is estimated that up to 4% of young Australians develop problems with gambling before they are aged 18 (DeFabbro, 2008). Sports betting is identified as the most rapidly growing segment of the wagering market in Australia (JSC, 2011). The sports betting market is estimated to generate revenue of over \$3 billion per annum, and has grown at a rate of 2.1% per year for the period 2009-2014 (IbisWorld, 2014).

### Gambling marketing

The magnitude of problem gambling in Australia suggests a strong need for research on antecedents and predictors of gambling behaviour among young people. Yet gambling research in Australia, and indeed worldwide, is still in its relative infancy, despite increasing attention from policy makers and scholars over the past decade. This is particularly true in relation to gambling marketing (Moodie and Hastings, 2009). Recent research in Australia (Monaghan et al. 2008; Thomas et al. 2012a; Thomas, et al. 2012b), and elsewhere (McMullan et al. 2012; McMullan and Kervin, 2012; Tse et al. 2012) has suggested that gambling marketing is highly prevalent, and that young consumers in particular are highly exposed and susceptible to gambling marketing. However, existing research is mostly descriptive, predominantly focuses on advertising rather than other elements of the marketing mix such as branding, and largely measures prevalence of gambling marketing or explores consumers' responses to it, without unpicking the theoretical and practice based mechanisms through which this occurs.

For example, McMullan et al. (2012) conducted qualitative focus group research with Canadian adolescents and identified that most had considerable exposure to gambling advertising, and identified cultural capital of gambling such as friendship, economic gain, fun and entertainment. Thomas et al. (2012) measured the frequency, length, and content of sports betting advertising in Australian Football League stadiums, and during television (TV) footage of games. They identified five different platforms of activity including fixed advertising (such as advertising on static billboards), dynamic advertising (revolving or electronic banners), scoreboard advertising in grounds or commercial break advertising on TV, integrated advertising (including verbal updates of match odds, broadcast sponsorship announcements), and team sponsorship (such as logos on player uniforms). The study found high levels of sports betting and few references to responsible gambling messages. Whilst such research develops the knowledge base, Binde (2014) has identified a need for more research on gambling marketing, considering the breadth of the marketing mix, and focusing on specific gambling activities such as sports betting. This study will increase knowledge by gaining insight on the mechanisms through which gambling marketing engages young consumers through exploring the use of brand community. Brand community is defined by Muniz and O'Guinn (2001, p412) as a *"specialized, non-geographically bound community, based on a structured set of social relations among admirers of a brand"*. The present study examines whether brand communities exist in the context of sports betting, and explores what effect it has on young adult gamblers.

Consideration of gambling from a marketing and consumer theory perspective may help explain its popularity among the Australian population generally, and specifically among young people. Gambling offers a consumption experience and leisure pursuit that has the potential to provide thrills, give punters the feeling that they are doing something out of the routine and potentially life altering, as well as satisfying hedonic consumer needs (Reith, 1999; Lucas and Bowen, 2002). In recent years, the gambling industry has successfully used marketing strategies such as stakeholder marketing to change the policy and regulatory environment, new gambling product and service development, branding and sponsorship, and integrated marketing communications, to grow exponentially (Humphreys, 2010), with opportunities to gamble becoming more prevalent in contemporary society than they have ever been. This is due to in part to the global expansion of legalised gambling and the concomitant increase in accessibility and availability in gambling (Korn and Shaffer, 1999; Korn, 2000). Technological advancements such as Internet gambling, accessible not only from computers but also from mobile phones, allow people to gamble on a diverse array of activities for an unlimited period of time, in any social or physical environment (Brindley, 1999; King et al. 2010).

Contemporary gambling marketing involves not only advertising on television, radio, and the printed press, but also using the full extent of the marketing mix: product (game design, market positioning, types of gambling opportunities provided), price (affordability of different forms of gambling), place (racetracks,

casinos, bookmakers, online gambling portals, public houses), and promotion (advertising, sponsorship, internet, mobile phone, product placement, celebrity endorsement) (Wijnholds *et al.*, 2007; Zangeneh *et al.* 2008; Dyall *et al.*, 2009). Recently there has been considerable interest on how gambling brands such as Centrebet or Tom Waterhouse have used marketing techniques to embed themselves with Australian sports (Aston, 2013). Research on alcohol marketing has demonstrated how alcohol brands have created brand communities and/or co-opted consumer communities in sport to engage consumers (Hastings, 2012; Gordon *et al.* in press). However, similar research on gambling marketing has not yet been carried out (Gordon and Moodie, 2009). Recent studies on the impact of alcohol and tobacco marketing on young people have also shown that it not only affects their attitudes and behaviours directly, but it influences their consumer socialisation to alcohol, and tobacco (DiFranza *et al.* 2006; Harris *et al.* in press). Applying this learning from tobacco and alcohol research, the present study will explore the use of brand community in gambling marketing, and young adult gamblers' responses to gambling, in Australia.

### **Theoretical framework for the study**

The present study follows an inductive theoretical extension approach – seeking to demonstrate the relevance of brand community theory to understand brand activity in sports betting consumption communities. *Brand community* is a concept that explains how consumers can identify with a particular brand, forming 'communities' that reflect the role and meaning of brands in the everyday lives of consumers, and the bi-directional relationships between consumers and the brand (Muniz and O'Guinn, 2001). Brand communities display three recognised elements of a community:

1. *Consciousness of kind* – a shared sense of unity and connectedness to the brand and each other. For example research on members of Harley Davidson brand communities identified that members felt connected and had similar values towards the brand and each other (Schembri, 2009).
2. *Rituals and traditions* – centred on shared brand consumption experiences. As an example, members of Harley Davidson brand communities would often organise regular meets and road trips on their motorcycles framed by various informal rules and regulations such as who would lead the formation of motorcycles (Schembri, 2009).
3. *Moral responsibility* – integration of members (McAlexander *et al.* 2002) and fostering a sense of duty and shared sympathy from members of the brand community to other community members and to the community as a whole. McAlexander *et al.* (2002) identified that moral responsibility helps integrate members into a brand community – for example knowledgeable members assisting neophytes in car club events to make them feel part of things. Schembri (2009) identified that



members of the Harley Davison brand community would look out for one another and sympathise with each other due to the connections they had through their motorcycles and the brand (Schembri, 2009).

Research suggests that the creation or fostering of a brand community can have a positive impact on consumer satisfaction, loyalty and consumption behaviours (McAlexander et al. 2002). Therefore, corporations often seek to use marketing strategies and techniques that associate their brands with existing communities, or create new communities. Examples of successful brand communities include Apple (Belk and Tumbat, 2005), Harley Davidson (Schouten and McAlexander, 1995), Beamish Stout Beer (O’Sullivan, 2011), and Carling Lager (Hastings, 2012). Much of the earlier work on brand communities focused on conceptualising their properties (Muniz and O’Guinn, 2001), or identifying how commercial brands can successfully create and manage such communities (Fournier and Lee, 2009). However, more recent research has begun to consider how consumers interpret, navigate and respond to brand communities (Thomas et al. 2013). Yet, heretofore there has been limited focus on brand communities formed around potentially harmful or addictive goods and services.

Recent research has suggested that brands of potentially harmful products such as alcohol create brand communities through associations with sports (which tend to be strongly tribal in nature) to engage consumers (Gordon et al. in press). This alcohol research has raised ethical issues regarding the use of brand community as a marketing tool to promote potentially harmful or addictive products, and in settings where vulnerable consumers such as children and adolescents may be present – for example sports fans. The present study explores whether brand community markers are present in sports betting marketing in Australia by considering the marketing strategies and young consumer’s responses to leading sports betting brands.

The present study also examines the responses and interactions of consumers towards sports betting brands. This includes considering the role sports betting, and sports betting brands play in the socialising and consumption practices of young adult participants. This work has links with the theoretical concept of *consumer socialisation*. Consumer socialisation is defined as the “*processes by which young people acquire skills, knowledge, and attitudes relevant to their functioning as consumers in the marketplace*” (Ward, 1974, p2). The concept of consumer socialisation draws on Bandura’s (1977) social learning theory, and posits that consumer attitudes and behaviours are learned during childhood and adolescence through interaction between a consumer and four main socialisation agents: parents and relatives, peers, media and marketing,

and schools (Ward et al., 1987). An extensive body of research suggests that commercial brands play an important role in the consumer socialisation of children and young adults (see John, 1999). Therefore, studies on consumer socialisation of young people to certain products have assessed their brand recognition, evoked set (a group of brands that are familiar to a consumer and that they consider when making a purchase), and brands actually consumed, finding that consumer socialisation to products such as alcohol strongly influences consumption behaviours (Harris et al. in press). The present study will explore the role that gambling marketing and gambling brands play as a socialisation agent for young adults, through exploring their knowledge of, and perceptions towards specific sports betting brands.

### **Research questions**

This mixed methods research project aims to explore whether markers of brand communities exist in relation to sports betting brands, and to explore the responses of young adult gamblers to, and interactions with sports betting, sports betting brands, and sport, including their role in socialising and consumption practices. To meet the aims of the project the following research questions were explored:

**RQ1. Do markers of brand communities exist in relation to sports betting brand marketing in Australia?**

**RQ2. How do young adult gamblers interpret, and respond to sports betting marketing, and specifically markers of brand community in sports betting marketing?**

**RQ3. What role do sports betting, sports betting brands, and sport play in the socialising and consumption practices of young adult gamblers?**

## Approach

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This project, due to its diverse mixed methods nature, did not adhere to a predetermined research paradigm. It had a pragmatic approach, using multiple methods to target and answer the research questions (Bryman, 2008, Muniz and O'Guinn, 2001, Thomas et al, 2012a, Creswell et al, 2003). The study featured quantitative and qualitative content analysis of contemporary sports betting marketing techniques featured in digitally recorded television footage of five selected National Rugby League (NRL) and five Australian Football League (AFL) matches in September 2013 (during two rounds of the regular season and the finals season). It also includes a quantitative and qualitative content analysis of sports betting brand marketing on the NRL, AFL and five leading sports betting brand websites: TAB, Tom Waterhouse, sportingbet, sportsbet, and Centrebet. Exploratory focus group research with young adult gamblers (18-30 years) was then conducted with 50 participants across ten groups who had reported some level of sports betting in the past year residing within urban and regional Victoria. The focus group research used inductive and perceptive techniques to explore participants' awareness of, response and interactions with sport betting brands, and the role of sports betting, sports betting brands, and sport in their socialising and consumption practices.

### Research methods - Stage one: Content analysis of sports betting brand marketing

#### *Website content analysis*

To explore whether contemporary sports betting brands utilise markers of brand community as a marketing strategy in relation to Australian sport - a content analysis of contemporary marketing communications featuring five leading brands was conducted. The content analysis was used to describe and make inferences about the characteristics and consequences of sports betting brand-marketing communications (Holsti, 1969). The five brands, which are among the largest sports betting brands in Australia, and are actively promoted in association with Australian sport, were Tom Waterhouse, sportsbet, sportingbet, TAB, and Centrebet. Quantitative and qualitative content analysis was conducted on the websites of the AFL, and NRL (two of the most popular Australian sports competitions and in which sports betting brands are present), and each of the five sports betting brands. This resulted in seven websites being included in the content analysis:

1. [www.afl.com.au](http://www.afl.com.au)
2. [www.nrl.com](http://www.nrl.com)
3. [www.tomwaterhouse.com](http://www.tomwaterhouse.com)
4. [www.tab.com.au](http://www.tab.com.au)

5. [www.sportsbet.com.au](http://www.sportsbet.com.au)
6. [www.sportingbet.com](http://www.sportingbet.com)
7. [www.centrebet.com](http://www.centrebet.com)

Each website was visited three times by two researchers to account for any temporal changes (during midweek, during the weekend/game days, and following the weekend round of games) to code and record sports betting brand activities using a coding sheet adapted from existing research (see Gordon et al. in press). Websites were visited during September 2013, the same period during which the TV footage content analysis was conducted. This involved recording the brand, location, size, and theme relating to each brand marketing instance, and if and how the content mapped to each of the three markers of brand community: consciousness of kind, rituals and traditions, and moral responsibility. Following protocols for content analysis identified by Krippendorff (2012) to measure the amount and meaning of the content of communications, quantitative analysis was first conducted to record the amount of sports betting brand sponsorship, and sports betting and brand community themed communications on the sites.

Qualitative thematic analysis was then conducted to interpret these data using the brand community theoretical framework to identify and interpret markers of consciousness of kind, rituals and traditions and moral responsibility. Examples may include describing the brand as official partner of the NRL or AFL or a particular club, or by associating the brand with match day rituals such as analysis or discussing tactics or how matches may unfold. Coders met periodically during the process, and inter-coder reliability checks were conducted randomly on the entire sample between two researchers. The coefficient of agreement (the total number of agreements [n=135] divided by the total number of coding decisions [n=147]) was 91.83%, and a third researcher resolved any disagreements by a majority vote. The research team discussed, interpreted and then formed representations of meaning from the content analysis and compiled findings for the inclusion in this report.

#### *Content analysis of Live TV footage of AFL and NRL*

This component of the content analysis involved analysing digitally recorded TV footage of five live matches from the National Rugby League (NRL), and five from the Australian Football League (AFL). Matches were selected to offer a spread across regular league and finals matches, and across large urban stadiums, and smaller suburban stadiums to assess for any differences in marketing activities depending on the location, time and importance of matches. TV footage of live matches was digitally recorded during August/September

2013 - the period when the last rounds of regular season games and the finals season games in both the AFL and NRL are played. Two regular round matches, two semi-final matches and the grand final match were examined across both codes (see **Table 1** for the matches that were analysed). This enabled an exploration of whether brand-marketing activities differ when matches increase in significance and occasion. A similar process of quantitative and qualitative content analysis was undertaken as for the website component. Digitally recorded television footage was analysed by three researchers, looking at the amount, screen time, type, size, location, and theme of any sports betting brand-marketing activity. The form of brand marketing activity was also coded using the framework presented in Thomas et al. (2012) that identified five platforms for sports betting advertising during live telecasts of sport: fixed advertising, dynamic advertising, commercial break advertising, integrated advertising, and team sponsorship (see **Appendix A** for a sample coding sheet). Following the quantitative analysis, a qualitative thematic analysis was conducted to identify and map any brand marketing activities that identified with markers of brand community: *consciousness of kind, rituals and traditions* and *moral responsibility* (see **Appendix B** for a sample coding sheet). Coders met regularly during the process, and due to the large sample size and following recommendations for coding reliability (Whaley, 2014), inter-coder reliability checks were conducted randomly on 20% of the sample (319 of 1,592) of coding decisions between the two researchers. The coefficient of agreement (the total number of agreements [n=301] divided by the total number of coding decisions [n=319]) was 94.36%, and a third researcher resolved any disagreements by a majority vote. The research team discussed, interpreted and then formed representations of meaning from the television content analysis and compiled findings for the inclusion in the report over a period of several months.

**Table 1. Detailed NRL and AFL match day footage**

	AFL		NRL	
Round match 1	R 23 (Aug 30 <sup>th</sup> )	Sydney Swans v Hawthorn Hawks	R 26 (Sept 6 <sup>th</sup> )	South Sydney Rabbitohs <sup>1</sup> v Sydney City Roosters
Round match 2	R 23 (Aug 31 <sup>st</sup> )	St Kilda <sup>a</sup> v Freemantle Dockers	R 26 (Sept 8 <sup>th</sup> )	Newcastle Knights <sup>2</sup> v Parramatta Eels

<sup>1</sup> Shirt sponsored by The Star Casino (not a sports betting brand per se, but a gambling organisation)

<sup>2</sup> Shirt sponsored by sportsbet

Semi Final 1	SF (Sept 20 <sup>th</sup> )	Geelong Cats v Hawthorn Hawks	SF (Sept 27 <sup>th</sup> )	South Sydney Rabbitohs v Manly Sea Eagles <sup>3</sup>
Semi Final 2	SF (Sept 21 <sup>st</sup> )	Sydney Swans v Fremantle Dockers	SF (Sept 28 <sup>th</sup> )	Newcastle Knights <sup>2</sup> v Sydney City Roosters
Grand Final	GF (Sept 28 <sup>th</sup> )	Fremantle Dockers v Hawthorn Hawks	GF (Oct 6 <sup>th</sup> )	Sydney City Roosters v Manly Sea Eagles <sup>3</sup>

<sup>a</sup>Shirt sponsored by Centrebet

<sup>1</sup>Shirt sponsored by The Star Casino (not a sports betting brand per se, but a gambling organisation)

<sup>2</sup> Shirt sponsored by sportsbet

<sup>3</sup> Shirt sponsored by Centrebet

### Research methods - Stage two: Focus group research with young adults

Focus group research was then conducted with young adults gamblers aged 18-30 years to explore their awareness and involvement with sports betting, sports betting brand marketing, sports, and brand communities, and their responses to it. Young adults aged 18-30, were selected as the target group for the present study given that previous research in gambling and alcohol has suggested they are particularly influenced by commercial marketing (Villani, 2001).

A series of ten small friendship group interviews (n=50) with young adult gamblers was conducted. Six groups were held in an urban location, and four in a regional location in Victoria, to represent population spread. Groups were split by gender, with six groups of young males, and four groups of young females. The sample bias towards young males is due to research suggesting young males are more strongly influenced by commercial marketing (Hastings, 2012), are more likely to be sports fans (Armstrong and Guilianotti, 1999), and are more likely to be gamblers (Productivity Commission, 2010). Small friendship groups are an effective method for qualitative interviews as they create a naturalistic environment in which participants feel more comfortable to discuss topics (Bryman, 2008), which is especially important considering the young age group and sensitive topic. Friendship groups have been used extensively in consumption community research (Arnould and Thompson, 2005) yet it should be acknowledged that some participants might feel reticent to discuss sensitive topics. Therefore, the judgement and expertise of the group moderator is important to ensure participants feel comfortable and are able to express their views. For the present study the research

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<sup>3</sup> Shirt sponsored by Centrebet

team held considerable experience in focus group research, with the lead researcher having 10 years' experience of moderating groups across a range of subject matters, with various participant groups, and in different countries. A purposive sampling approach was used; with a qualitative research recruitment organisation, I-View, sub-contracted to recruit ten friendship focus groups each containing five participants. The lead researcher issued i-View with specific inclusion criteria including age (18-30), location (6 groups in urban and 4 in regional Victoria), gender split (6 male and 4 female groups), and gambling behaviour (had reported sports betting in past 12 months). For each of the friendship groups one 'lead' was recruited and then asked to identify four other friends that met the recruitment criteria and these friends were screened for suitability and inclusion. Information sheets and consent forms were then distributed, and written informed participant consent was obtained. Participants were offered a \$30 gift voucher as recompense for their time, and groups were held in participants' homes, or a local amenity. Table 2 presents the sample criteria and schedule for the focus group research.

A semi structured discussion guide was utilised to ensure that themes relevant to the research questions were addressed in each group (see **Appendix C**). To explore responses to the use of brand community markers by gambling brands the groups started with a discussion about sport in general, before exploring brand sponsorship and marketing of Australian sport. Example questions during this part of the discussion included: *what sort of words/feelings do you think of when you think about sport and gambling?*; and *why do you think [sponsor's name] sponsors Australian sport?*

Sports betting brand sponsors of Australian sports and the NRL and AFL specifically were then explored. Examples of gambling marketing identified in the content analysis such as TV advertisements or website pages were shown on an iPad, and used as stimuli to encourage discussion. Projective techniques were utilised, including an activity that tested participants' aided and unaided awareness of the five sports betting brands: Tom Waterhouse, sportsbet, sportingbet, TAB, and Centrebet to explore the role of these brands in their consumption practices (see **Appendix D and E**). This involved handing each participant a short survey, and then producing show cards asking them to identify masked and then unmasked sports betting brands. Short surveys were then collected from participants to identify the level of unaided and aided awareness of sports betting brands. A perceptual mapping activity (Kotler and Keller, 2008), was then conducted in which participants were asked to rate their perceptions towards each of the same five brands according to how closely they related to markers of brand community: *consciousness of kind, rituals and traditions, and moral responsibility*. These activities enabled an exploration of the appeal of, and perceptions and emotional responses to, sports betting marketing.

Each focus group was digitally recorded, transcribed, and then entered into the QSR NVivo 9 qualitative data software tool for analysis. Once the data was loaded into QSR NVivo 9, the researchers met and discussed emergent themes from the data over a period of three months, and proposed a draft coding structure

informed by the brand community theoretical framework, the study research aims and questions, contextual themes included in the discussion guide, and after inductive review of the focus group transcripts. The researchers then discussed and revisited this thematic analysis during an iterative process, meeting regularly to reach a negotiated interpretation and representation of meanings emerging from the focus group research. Following analysis, the findings were then written up and combined with the findings from the content analysis, for inclusion in the final report and publication outputs.

**Table 2. Focus group recruitment timetable**

Urban Victoria	Monday 2 <sup>nd</sup> December	5 Males 18-30	Area A
	Monday 2 <sup>nd</sup> December	5 Males 18-30	Area B
	Tuesday 3 <sup>rd</sup> December	5 Females 18-30	Area C
	Wednesday 4 <sup>th</sup> December	5 Males 18-30	Area D
	Thursday 5 <sup>th</sup> December	5 Females 18-30	Area E
	Thursday 5 <sup>th</sup> December	5 Males 18-30	Area F
Regional Victoria	Monday 16 <sup>th</sup> December	5 Males 18-30	Area G
	Monday 16 <sup>th</sup> December	5 Males 18-30	Area H
	Tuesday 17 <sup>th</sup> December	5 Females 18-30	Area I
	Tuesday 17 <sup>th</sup> December	5 Females 18-30	Area J



## Results

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### **Analysis - Stage one: Content analysis of sports betting brand marketing**

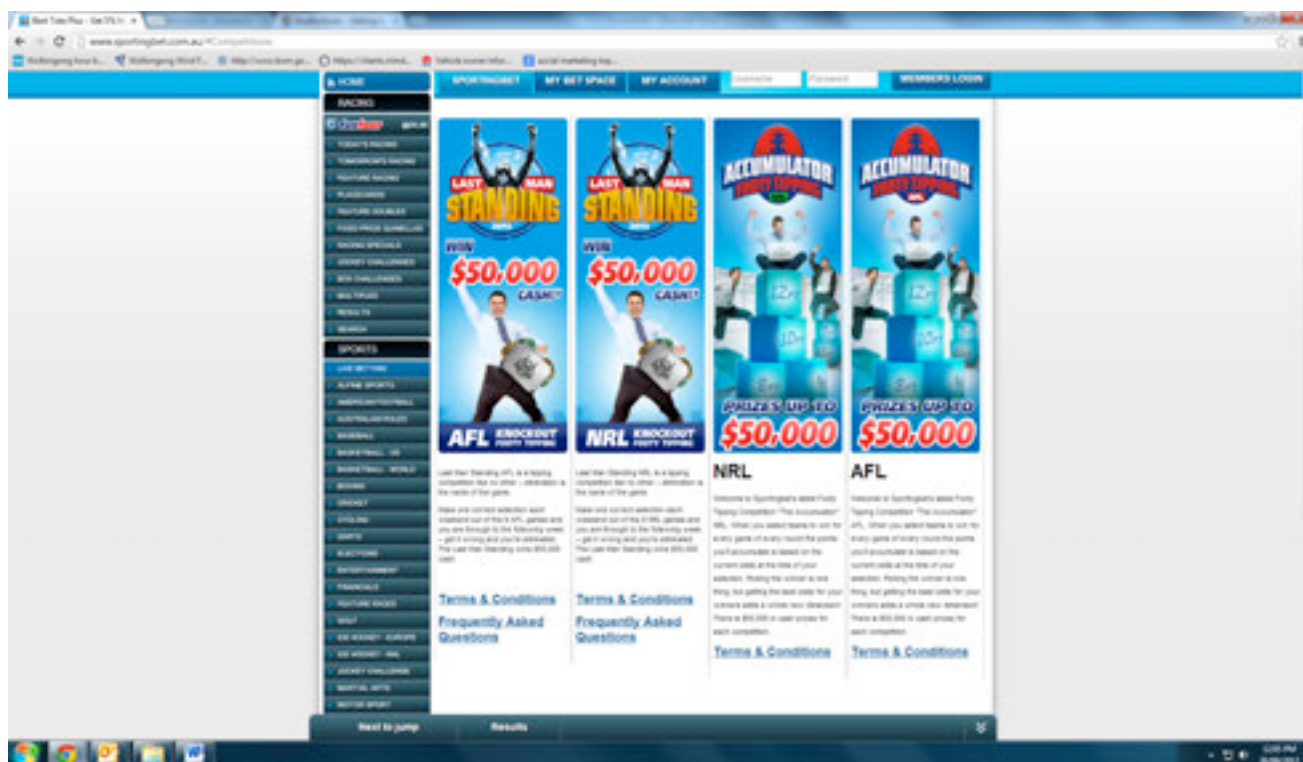
#### *Website content analysis*

As suggested in the methodology, website analysis occurred at three time points, midweek before match days, at the weekend during a round of fixtures, and following a weekend of matches. Website content did not differ greatly between these three time points (especially for pages for example that related to mobile applications or team specific links) however there was a noticeable change in marketing toward either the AFL or NRL grand final depending on the proximity to each respective event.

Two consistent marketing strategies were identified within both the gambling brand's website and the football code's (AFL and NRL) website. These included engaging potential consumers in the gambling community as well as enhancing the brand community experience.

#### Consciousness of kind

The sense of brand connection and unity was present on the gambling companies' websites more so than the football code's websites. The social interaction created from such marketing techniques is not always tangible and although most consumers have not met one another, there is a feeling that they know each other. This was seen with competitions (see **Figure 3**) offers and incentives on company websites that included consumers in the brand such as TAB "Win a Grand Final BBQ with Grand Final Heroes", iPhone application incentives for Sportbet, and 'Last Man Standing' competitions with sportingbet. These activities reinforce the sense of togetherness associated with consciousness of kind.



**Figure 3. Gambling company website (sportingbet) showing consciousness of kind through consumer competition.**

Rituals and Traditions

Whilst on the betting companies’ websites, all five of the companies stated they were “an official partner” (TAB), “an approved betting partner” (Tom Waterhouse and sportsbet) or “an approved betting provider” (Centrebet and sportingbet) of either the AFL or NRL. Four of the five (excluding TAB) were partners across both codes (see **Figure 4** for examples).

Paid gambling brand advertising on the AFL and NRL football codes’ websites fostered the link between the sport and their company even more directly. This included links to brand’s websites accompanied by the AFL logo, a picture of successful AFL teams and competition entries; “Win a double pass to the 2013 AFL Grand Final”. The concept of a gambling brand community was integrated into a large majority of each football code’s unique page links again reinforcing the presence of the brand in the football code (rituals and traditions);

- AFL and NRL homepages,
- match centres,
- casualty ward injury reports,
- premiership ladders and
- fixtures and results,
- latest trades,
- team line ups,
- mobile application download pages.

As with the TAB ‘robot’ advertisement discussed later in the analysis of the digitally recorded television footage, sports betting brands identified as being part of the AFL/NRL football culture. For example TAB discussing the game and running a competition to win a ticket to the AFL Grand Final in their brand marketing. Such activity often identified the potential to enhance the sporting experience, by adding interest or another dimension to the practice of watching the game.



**Figure 4. Australian Football League (AFL) website showing TAB’s rituals and traditions marketing technique.**

Moral Responsibility

On the gambling company websites, the odds and betting options were very clear and easily identifiable but offers or incentives were always present somewhere on the page that encouraged consumers to either place that next bet; “AFL Grand Final- Who will win?”; or become a member (or a more involved member for some); “follow us @sportingbet”, “like us on Facebook” (see **Figure 5** for examples). The marketing strategy on the brands’ websites used engagement as well as the link to sport to engage people in the brand community of sports betting organisations at the point of sale.



**Figure 5. National Rugby League (NRL) website showing sportingbet’s moral responsibility marketing technique, aiming to integrate and retain brand members.**

*Content analysis of Live TV footage of AFL and NRL*

The following section presents quantitative analysis of the screen time, and number of incidences of sports betting brand marketing activity identified during recorded television footage of AFL and NRL matches. Quantitative counts on the type, size, location, and form of all brand marketing activity identified, is available upon contacting the lead researcher. However, the primary focus in this report is on the amount and screen time of sports betting brand marketing activity, followed by a qualitative thematic analysis of existence of brand community markers in these materials.

Within the AFL match day footage there was a total screen time of gambling advertising (cumulative total of time that all gambling advertising appeared on screen across all 5 matches) of 54 minutes 20 seconds, and an average screen time of gambling advertising per match of 10 minutes 52 seconds, during the five match television broadcasts. This equated to an average of 93 on-screen incidents per match (i.e. single occasions on which a gambling advertising item appeared on the screen). Gambling advertising screen time per match (cumulative amount of time that all gambling advertising items appeared on screen in total for one match) ranged from 2 minutes 15 seconds (Swans v Dockers Semi Final) to 21minutes 3 seconds (St Kilda v Dockers Round 23) and gambling advertising on-screen incidents per match ranged from 12 to 186 incidences. Screen

time and incidences may have varied between games due to variation in the stadiums and how the stadiums may have been dressed in advertising, and also variation between the teams playing in games and the different brand sponsors these teams may have (see footnotes relating to Table 1)..

Table 3 below provides more details on each of the five-match day analysis;

**Table 3. AFL quantitative match day footage**

Match	Screen time	Incidences viewed
Swans v Hawthorn Round 23	00:05:16	43
St Kilda v Dockers Round 23	00:21:03	186
Geelong v Hawthorn SF1	00:13:18	111
Swans v Dockers SF2	00:02:15	12
Hawks v Dockers GF	00:12:28	114

The NRL match day footage provided a higher rate of both screen time and incidences of gambling marketing. Across the five NRL matches, gambling advertising was on-screen for a total of 1 hour 18 minutes and 10 seconds, at an average of 15 minutes 38 seconds per match. This consisted of a total of 1,126 individual on-screen gambling advertising incidents across the 5 matches, at an average of 225 incidences per match. The range of both screen time and incidences were lowest during the Knights v Roosters Semi Final (6 minutes 30 seconds; 97) and highest during Souths v Manly Semi Final (27 minutes 26 seconds; 286). As with the AFL, these variations may be explained by a number of factors. Firstly, there are differences in the stadiums for example regional/suburban stadium, or larger municipal stadium; and also how stadiums were dressed in advertising for particular games as this can vary considerably. Furthermore, the team featured in matches – for example if they were sponsored by a sports betting brand, affected the incidences recorded. Four of the five NRL matches had more than 140 recorded incidences of gambling advertising during each of their respective broadcasts. **Table 4** below provides a summary of match details;

**Table 4. NRL quantitative match day footage**

Match	Screen time	Incidences viewed
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Souths v Rooster Round 26	00:25:06	411
Knights v Eels Round 26	00:09:03	146
Souths v Manly SF1	00:27:26	286
Knights v Rooster SF2	00:06:30	97
Manly v Rooster GF	00:10:05	186

The digitally recorded television footage helped identify a range of brand community references across the five platforms seen in Thomas et al (2012) of fixed advertising, dynamic advertising, commercial break advertising, integrated advertising, and team sponsorship. The analysis of match day footage not only provided some quantitative feedback; it also provided a greater insight into the use of brand community tactics from a qualitative point of view. There were numerous references, both direct and indirect, to the culture, traditions and sense of community within both sports as gambling organisations looked to legitimise, normalise and embed their brands within the behaviours and cultures of Australian sport (see **Figure 1 & 2** for examples).



Figure 1. Integrated gambling marketing during the Australian Football League (AFL) grand final



**Figure 2. Team sponsorship during the National Rugby League (NRL) round match**

Tom Waterhouse took up the majority of gambling advertising screen time, and hence the match day analysis reflects this. Most incidences included commercial advertising through television advertisement breaks as well as integrated advertising as the broadcast came back from or was going to a commercial break.

#### Consciousness of kind

Consciousness of kind is a marker of brand community that was evident within this match day analysis. Consciousness of kind creates a connection not only between the brand and the consumer but also to others who use the brand (Muniz and O’Guinn, 2001). A number of commercial advertisements during this analysis used slang football terms to create these bonds. This included commenting on the game itself, the history of the sport, as well as the head to head comparison of the two clubs playing. The following statements are from a number of Tom Waterhouse’s commercial advertisement during the Souths v Manly, Roosters v Newcastle and Souths v Newcastle games respectively.

*“There is no love lost between these two sides and tonight I expect it to be a fiery encounter...Manly, they have a great record in the finals but the Bunnies they’ve won 4 out of their last 5.”*

*“The Roosters lead the league in attack and defence, but I like the Knights. Wayne Bennett’s record in finals footy... The star of the game, well that will be Sonny Bill and that’s why I’ve got a terrific offer for all my clients.”*

The use of words like the “Bunnies” and the reference to coaches and players such as Wayne Bennett and Sonny Bill Williams throughout the advertising broadcast shows the company’s awareness and knowledge of the sport. This can portray a perceived sense of connection to the consumer, as the gambling organisation knows as much as, or sometimes more than the target gambling population group.

### Rituals and Traditions

Rituals and traditions refer to how brands use markers of community that relate to patterns of behaviour, assumptions, rules and customs associated with a group, community or culture. Examples of alignment with this marker of brand community were present in the content analysis research. For example during a 30 second TAB commercial advertisement identified during analysed match day footage - two friends that win on a TAB bet do ‘the robot’ dance to celebrate. Whenever they see each other after the win they continually remember the time they won the bet and again practice the robot. This references the rituals and traditions concept connected with sports betting, sport, and the TAB brand. These two characters are relatable to the young adult target population of the gambling brand, which has also been highlighted in the focus group research within this study. This advertisement offers an insight into a “shared consumer experience with the brand” with the TAB message stating, that without scanning your ticket at the TAB, you may not get the same experience.

Other examples that reference rituals and traditions of what people do when they watch sport, and indeed also moral responsibility that integrates members into brand consumption community were identified in the content analysis, for example:

*“So get your mates together and have a crack at the quaddie at the track at your local NSW TAB or tab.com.au”*

The quotes taken from the digitally recorded television footage along with the extent of brand marketing evident during match days (see Table 3 and 4) demonstrates how gambling brands appear to embed themselves into the Australian sporting culture. By linking their own gambling brand to the strong traditional history of sports, the rivalry and tribal nature of sports, as well as the teams and players within them, companies have the ability to merge into that sporting culture, with the perception of a richer experience if consumers interact with these brands.

### Moral Responsibility

The content analysis also identified examples of use of marketing activity relating to the moral responsibility marker of brand community. Following these statements with, *“The Bunnies, they will be too strong but if you disagree, I’m offering enhanced odds...”* again shows Tom Waterhouse’s perceived knowledge of the



game, establishing the legitimacy of the brand, and facilitating integration between members and the brand and their retention in the community. In portraying to “know what punters want” the Tom Waterhouse brand aligns with the assertion from Cova (1997, p307) that “the link is more important than the thing”, and that sports betting brands endeavour to establish linking value between the brand and consumption communities.

Further evidence to suggest the three markers of the brand community are closely linked within gambling marketing includes the following statements from the Tom Waterhouse brand linking consciousness of kind and moral responsibility markers. Within these statements, there are references to important matches, and offers and incentives that communicate knowledge of the game, therefore establishing and legitimatising the brand with the community. Furthermore, the presentation of seemingly rewarding offers such as paying on losing bets suggests that Tom Waterhouse shows moral responsibility to gamblers by looking out for them.

*“I give you enhanced odds on the premiership favourites. With the Grand Final only a month away, I’m offering enhanced odds of \$5 for both Hawthorn and Geelong to be the premiers, for a limited time.”*

*“For the first 1000 punters who take me on, you’ll get enhanced odds of \$3.50 for Geelong”*

*“That’s why I have got an amazing offer for all my clients. If either of these two teams are ahead by 20 points or more in any time through the game and go on to lose, I’ll pay them out as a winner”*

These examples suggest that sports betting brands are aiming to display a sense of moral responsibility towards members of the sporting community, by looking out for them and their interests, and giving them incentives or attractive incentives that serve their interests and needs, whilst also integrating them in the community, and encouraging them to gamble.

### **Analysis -- Stage two: Focus group research with young adults**

The idea of brand communities first emerged when participants spoke of how they began betting with a certain company. The ‘sense of unity’ (consciousness of kind), ‘shared consumer experience’ (rituals and traditions), and the ‘process of integrating and retaining members’ (moral responsibility) were strong indicators of a friendship referral system. Companies that were perceived as trustworthy, knowledgeable, part of the culture, searchable, straightforward and modern were more commonly referred to friends who were potential betters.

### Consciousness of Kind-

The focus group research identified that participants perceived markers of brand community to be present in sports betting brand-marketing activity. In relation to consciousness of kind, participants discussed how funny and relatable advertising that aligned with their own social and consumption practices were more likely to engage them. By aligning with the practices of participants, these brands foster the sense of togetherness found in consciousness of kind.

*“For example if one of our friends asks ‘where you are betting I want to bet as well’ I would say sportsbet. I already use them the last 4 or 5 years, it’s a good website, so definitely go with that. So go with the community as well I would say”.*

For example, a sportsbet advert using irreverent humour was popular and engaged young adults in the focus groups. A promotion for Centrebet that offered free football jerseys for betting was also popular and engaging as it offered something that participants liked and was appealing to them. These offers also reinforce moral responsibility by giving something back to consumers, suggesting that these sports betting brands are looking out for members of the sporting community cultures.

*“Their (sportsbet) social media is great and they’re funny, they’re that big thing in the paddock at the Wallabies when the British Lions came out. That’s one of the best pranks I’ve ever seen”.*

*“Centrebet did a promotion for our football club so we put on a \$50 bet – what was it...You got a footy jumper if you bet \$50. So you paid \$50 for a jumper or a Guernsey, whatever you call it depending where you’re from and they sent you a footy jumper. And the footy jumper is worth \$50 plus anyway so you got a jumper and a bet. That’s how I got into my centrebet account. I’ve never looked back [laughter] so good work from them”.*

*“As I said if I’m following sportsbet and they’re quite funny so if they pop up an add that appealed to me, stuck out, it might be refund on my own team if they lose, of course I’m going to put money down and be more involved in that company”.*

The process of betting through these sports betting brands also seemed to foster the togetherness that consciousness of kind creates:

*“If you were betting with a friend and you’re both winning you can kind of bond that way as well...we’re mates because we bet together and we won”.*

## Rituals and Traditions-

Participants described how sports betting fitted with their social lives, and general socialisation. For instance, participants often discussed how groups of friends would get together and socialise for a big sports event, often in a pub, a friend's house or at the stadium, and then discuss betting on the match and often each bet on the same event. These social processes form part of the rituals and traditions that surround sports betting, and indeed following sport. That these sports betting brands appear to be embedded within these processes, means that brand communities can also be formed in which these brands become part of and indeed often central to these practices.

*“Every grand final day a group of us boys will get together for a barbeque and we’ll make sure in the morning everyone’s put their bets on and we’d write all the bets we had up on a piece of paper so everyone in the room can see. The last grand final Nathan Fife kicked two posts in a row so the whole room was erupting and stuff”.*

Q: *“So run us through that, grand final day, you go to the TAB or you all have accounts”?*

*“The general consensus for me and my mates is all on mobile through sportsbet. Either one bloke’s got his phone out and the few that don’t have the app jump on or they’ll give him money and he’ll do it for them and things like that. Or a few people have done pre bets. But the general consensus for me is phone”.*

Value perceived from sports betting included the thought of winning and the money that would bring, but also focused on emotional benefits such as increased engagement in games, appearing smart in front of friends, beating the bookmakers, getting a thrill, excitement and an adrenalin rush. Interestingly, participants identified how these sentiments mirror the emotional elements relating to sport.

Emotional engagement in football matches was even more pronounced when participants were wagering on or against their own team. A comment was made that there was an evolution from hedging your bets to the ability to *“hedge my emotions”*, or bet against one's team in a situation where one desired outcome is achieved, highlighting the role of the sports betting brands in stimulating different rituals and practices.

*“It depends on circumstance and how much you invested. If the teams going for a top 8 position or something, you prefer your team to win rather than lose the bet but if it’s a game that doesn’t have much riding on it you probably prefer you bet to win rather than a team to win one more game that doesn’t count”.*

Participants consistently described how they regarded sports betting to be inextricably linked to the sporting

culture of Australia. They also stated that marketing was so widespread that it became a part of the background, a subconscious entity that was part and parcel of watching or going to the football. Considering sports betting organisations have only been around for the past 10 years it is fascinating to see how well they have created a community of co-consumption allowing gamblers to place a bet on nearly any market imaginable both in Australia and overseas.

*“You go to the MCG and it’s plastered all over the place, sportsbet, they show the odds and all that sort of stuff”.*

*“Whether in the paper or on line, AFL website, read an article and at the bottom it will say sportingbet. Odds, \$1.50”.*

Again, these comments reinforce how sports betting brands appear to be embedded within the rituals and traditions, and consumption practices associated with sports.

#### Moral Responsibility-

As alluded to earlier by focus group participants, the shift in the way people place bets, moving to a more online and mobile phone app market, is another opportunity for gambling organisations to use brand community markers to communicate with the youth audience through the role of the material. Sports betting brands have utilised developments and growth in technologies to foster a more personalised approach to gambling, where people can place a bet on their phone within minutes, regardless of their location. Coupling this with the expansion of gambling and sporting options, both domestically and overseas, has created a larger, more accepting gambling population – essentially building the community, integrating members and retaining them. It has created a culture of young Australians who have been socialised into betting practices. Interestingly, these practices seemed to be fairly normalised, ubiquitous, and easy to perform among participants in this research, including young adult females.

*“We could be gambling right now. ‘I’m just checking a text message, well actually I’m placing a bet”.*

*“Pretty much everyone bets now, I noticed when I was younger growing up, the age difference in the TAB. I remember when I was a kid in there with my dad, it was always the older blokes and now it’s from 18 to 80”.*

Furthermore, participants commented on how sports betting brands would look out for members with money back specials on losing bets.

*“As I said if I’m following sportsbet and they’re quite funny so if they pop up an add that appealed to me, stuck out, it might be refund on my own team if they lose, of*

*course I'm going to put money down and be more involved in that company."*

A recurring theme within the focus groups was a distinct separation perceived by participants between groups of gamblers, suggesting hierarchies at play in sports betting consumption. The most apparent was the older male population, with a stigma surrounding their betting behaviour, spending their weekends down at the TAB or pub. Younger gamblers do not identify as part of this gambling group.

*"I think I'd have a negative look upon some of them if I was just walking through the TAB or something like that. There's just this group of men, zombies, watching this TV".*

*"You go into the local TAB and see the same guys every time".*

*"There's something a bit old man about the TAB".*

Although the primary focus here is on brand activity, this sort of hierarchy and conflict in consumption communities has been suggested in extant research, and warrants further investigation, given that the brand community concept assumes to a degree that there is homogeneity among members (Canniford, 2011).

#### Brand awareness and receptivity

Participants across a majority of focus groups displayed high levels of unaided brand recall of sports betting brands. This was tested using a masked and unmasked brand card identification projective technique during the interviews (See **Appendix D** and **E**). For example, 91.3% of respondents correctly identified Tom Waterhouse, and 89.1% correctly identified TAB. Projective techniques were also used to stimulate participants' recall of advertising and channels of advertising by showing them videos of sports betting brand adverts that were present during the match day footage. This identified high recognition, as well as salience, of sport betting advertising by many participants in the groups. The projective technique described earlier in the methods section and which featured a card sorting perceptual map task in which participants mapped their views on the five sports betting brands according to their alignment with the markers of brand community helped identify the most salient brands to participants. This identified that participants strongly identified most of the brands with the sports community; particularly TAB; sportsbet, and Tom Waterhouse.

Although not the principal focus in this report, the study also identified that participants recognised negative aspects relating to sports betting practice. For example participants talked about losing money, and on spending income on betting that could have gone towards other things. However, sports betting brands encouraged them to rationalise this, by dismissing losing, whether that be through no lose 'guarantees' such as money back specials, or by highlighting the primary importance of socialising and creating memories with friends.

*"I think comes down to acknowledging you can't afford certain things. Most of us here can afford ten, 20 bucks and that's not a problem but a lot of people don't admit, don't*

*acknowledge 'wait a minute I can afford to lose a hundred bucks' when they can't. They don't know their own limits".*

*"Half of it - when I put that money on, that to me is paid for and I've lost the money already. That money goes on the account and to me I might just as well have bought something—that's gone".*

*"If you do happen to lose big, 'oh, I have to try to win that money back' you bet more and it's just that spiral downward. I've tried to chase it."*

*"It's mainly whenever they are betting, if they have lost a big amount, the memories are always there...The friends are talking in 2 years' they will say we have lost \$200 or \$500, but remember this".*

This suggests that the social harms associated with brand community consumption warrants relating not only to sports betting, but more generally in the consumer culture literature warrants further inquiry.

## Conclusions

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The present study builds on existing research that suggests that sports betting marketing is ubiquitous in Australia, by examining the nature and form of such marketing activities, and young adult gamblers' responses to it.

### **RQ1. Does sports betting marketing in Australia foster or utilise markers of brand communities?**

The study found that sports betting brand marketing in Australia does display use of markers of brand community. The website, and Live TV match footage content analysis identified that sports betting brands seem to be highly embedded within sporting community cultures. For example the AFL and NRL websites featured a prevalence of advertisements, brand logos, and references to sports betting brands that often related these brands to practices relating to sport such as betting on the winner of the AFL Grand Final, or being an official brand sponsor of the NRL. These brand-marketing activities go further than just makes these brands present in these spaces, but embed them within the customs, norms and rituals surrounding sport. The content analysis identified that brand marketing activities often related to markers of consciousness of kind, displaying the brands as a legitimate presence in the community cultures surrounding sports like the AFL and NRL. Similar practices were identified in relation to rituals and traditions and moral responsibility. These findings offer insight on the subtle, emotional tools that brand marketers use to engage consumers.

### **RQ2. How do young adult gamblers interact with and respond to sports betting marketing, and specifically brand community?**

The focus group research found that young adult participants were highly aware of, and engaged by sports betting brands, and that sports betting brands, sports betting, and consumption of sport were prominent features in their regular socialising and consumption practices. Participants identified that sports betting brands were part of the community of sport, they were highly present and visible, and largely accepted and engaged by participants. Participants related to sports betting brands that shared their own socialising and consumption practices such as use of irreverent humour, or offering incentives that would appeal to them such as a free football jersey. The role of the material produced by brand marketers was also identified as salient – for example mobile betting apps, and online markets on websites, and participants mentioned that these were staple ways in which they bet. During the brand recognition projective activity, unaided awareness of several of the sports betting brands was high, suggesting that the marketing activity of these brands are effective in gaining awareness of young adult gamblers in the study sample.

### **RQ3. What role do sports betting, sports betting brands, and sport play in the socialising and consumption practices of young adult gamblers?**

Participants in the focus groups discussed how they had signed up to or used sports betting brands as part of regular and normalised socialising and consumption practices in their lives. For example, some participants discussed how they would socialise in the pub or at a friend's house to watch a big match, and then would all have a bet on the outcome using a sports betting app. Both male and female participants recounted such practices. Participants also discussed how these contemporary forms of gambling consumption were perceived to be different to more traditional forms involving 'older men' betting on horses down at the TAB for example.

These findings suggest that more than just being highly prevalent, sports betting brands use marketing to integrate and embed themselves within socialising and consumption practices surrounding sport. In essence they become part of the furniture to gain acceptance and legitimacy among consumers, which may bring benefits of consumers choosing to consume these brands' offerings. Aligning with the community and a sense of being as one through official sponsorship messages, or integrated marketing during play or television footage of sport helps these brands foster consciousness of kind. Brands referencing the rituals and traditions such as match day analysis, and mateship further engages the sense of community. Furthermore, integration and retention of members through activities such as money back specials, or no losing bets if you bet on your team promote a sense of moral responsibility from sports betting brands towards members. Therefore, whilst existing research has shed some light on the extent of sports betting marketing (see Thomas et al. 2012a), this present study helps offer insight into what mechanisms sports betting marketing employs to reach, engage and influence consumers through referencing of community markers. In doing so the study has demonstrated that research needs to go beyond matters of prevalence and ubiquity, but to also consider the mechanisms, and community consumption and practice-based tactics used by sports betting brands to engage gambling consumers.

### *Theoretical implications*

This study has implications for understanding of brand community as a theoretical framework for consumer research. Heretofore, studies have not examined gambling and specifically sports betting from a brand community perspective (Binde, 2014). The present study suggests use of brand community markers to engage gamblers may be present in this domain. Extant, research on brand community has identified more direct relationships between consumers and a single brand (Canniford, 2011). The present study has identified more complex relationships between brands, sports, and consumers, suggesting that contested or multifaceted forms of brand and consumption community relationships may warrant attention and further research to understand these relationships. Here we identified five leading sports betting brands that in different ways have engaged consumption communities through alignment with community markers. The identification of brand community markers associated with sports betting brands within the Australian sports community, also potentially generates some ethical concerns previously discussed in research on alcohol



brand communities (Gordon et al. in press). Given that sports betting and gambling more generally is a potentially addictive behaviour, and can be associated with health and social harms; its promotion using subtle emotional tools such as brand community warrants investigation from an ethical marketing perspective. For example, is it ethical to use brand community to promote potentially harmful or addictive goods and services such as sports betting? Furthermore, given that Australian sports, and sports more generally around the globe are popular with children and adolescents, there may be ethical concerns that vulnerable and underage consumers may be exposed to and engaged by sports betting brand community activities. The present study only touches upon these issues, but future research may be able to offer further insight on these matters.

### *Policy implications*

The findings also have implications for policy makers. There is an increasing focus by decision makers on policy and regulation concerning sports betting marketing in Australia. If policy makers are to consider restrictions on gambling marketing, it is important that they are aware of the mechanisms through which sports betting engages and influences consumers. By embedding brands within sports communities and cultures, brands use a powerful emotional tool that moves beyond mere prevalence and presence. Any regulations or restrictions would need to consider how embedded brands are in these spaces, and what effective frameworks would prescribe regarding such activities and how they would be monitored and implemented. This is particularly relevant given that gambling is legally an adult consumption practice, but sports betting brands are active in spaces such as Australian sport in which under age consumers are present. These marketing practises and processes are also important and relevant to the sports involved – for example the AFL and NRL undoubtedly rely on the sponsorship income provided by sports betting brands. Any consideration of regulation would do well to engage and acknowledge the views of the sporting community regarding potential loss of income or impact on their marketing activities.

### *Future research*

In terms of future research, it would be interesting for further research to be conducted in this space in other sports, in other geographical locations, and considering other consumer groups beyond young adult males and females. This would help establish whether different conditions, structures and relationships occur dependent on these factors. Furthermore, as previously mentioned research exploring and deconstructing the ethical dimensions of using brand community markers to promote sports betting brands would offer insight on potential ethical concerns. Research exploring branding and brand community, and consumer interpretations and responses to branding concerning other forms of gambling, and other sports such as horse racing, would also add to the knowledge base. In addition, the present study identified that the role of brand material in sports brand betting consumption communities was prominent, with the content analysis

identifying strong promotion of mobile betting apps and online markets that were discussed by participants and featured in their practices. Therefore, further research perhaps using a netnographic approach to explore brand strategies and consumption practices in online and mobile betting communities could add further to the knowledge base. Finally, longitudinal survey research to explore antecedents and causal associations between exposure to gambling marketing and gambling behaviour, similar to research conducted on tobacco (Lovatto et al. 2003) and alcohol marketing (Anderson et al. 2009), would help inform policy makers regarding regulation, and practitioners in the gambling support field in understanding the influences on behaviours.

### *Study limitations*

It is acknowledged there are some limitations to this study. First, the study was exploratory, and only considered one dimension of consumption communities relating to sports betting – specifically how brands use community markers and the responses of young adult gamblers to these activities. Therefore, although the findings offer some further understanding of these processes, research exploring other aspects of sports betting consumption communities with a greater focus on consumer tactics, hierarchies, and power structures, can further enhance the knowledge base. Furthermore, quantitative research would be required to produce generalisable findings on themes identified here. Second, although young adult males and females are an important group in relation to examining sports betting brands, other segments such as children and older adults, may have important views and attitudes towards constructs such as the three markers of brand community. Third, the research was conducted in urban and regional Victoria, and focused on two sporting competitions: the AFL and NRL. Therefore, differences in brand marketing activities and consumer responses may exist in different geographical locations and in relation to other sports.

### *Conclusion*

In conclusion, the study has shown that contemporary marketing of sports betting brands displays markers of brand community, suggesting that such brands may utilise this as a marketing device to engage consumers. The content analysis research identified that sports betting brands are often marketed in association sports and specifically the AFL and NRL using markers identifiable with sports consumption communities. For example brand marketing activities often referenced players and teams, identified knowledge of the game, discussed rituals and traditions associated with the game, and identified the brands as part of the culture of sport. Interestingly, the NRL appeared to have a higher level of sports betting brand marketing present. The focus group research identified that consumer participants appeared to be engaged by sports betting marketing, and identified an often symbiotic relationship between sports betting, sports betting brands, and sports (specifically the AFL and NRL). Participants also described how sports betting was reasonably well established as a cultural and social norm among themselves and their friends and peers. This suggests that

sports betting was established within the socialising practices of these consumers. This study therefore offers increased insight and understanding on the heretofore under researched consumer perspectives relating to gambling research. Specifically, the study offers insight on the processes through which sports betting brands, and sports betting brand marketing may engage consumers, and how consumers interpret and respond to these marketing activities.

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## Appendices

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### Appendix A - Example Quantitative Analysis Content Analysis Coding Sheet (Souths vs Manly)



Figure 1: Screen time incidences with location/type information

Sum of Count (hr:min:sec)	Brand				Grand Total
Describe the type and nature	Centrebet	TAB	The Star Casino	Tom Waterhouse	Grand Total
Lockerroom souths			00:00:52		00:00:52
Manly Jersey	00:13:58		00:00:32		00:14:30
On Screen pop up				00:02:40	00:02:40
Rotating field banner		00:01:08			00:01:08
Souths Jersey	00:00:23		00:06:54		00:07:17
TVC				00:00:59	00:00:59
Grand Total	00:14:21	00:01:08	00:08:18	00:03:39	00:27:26

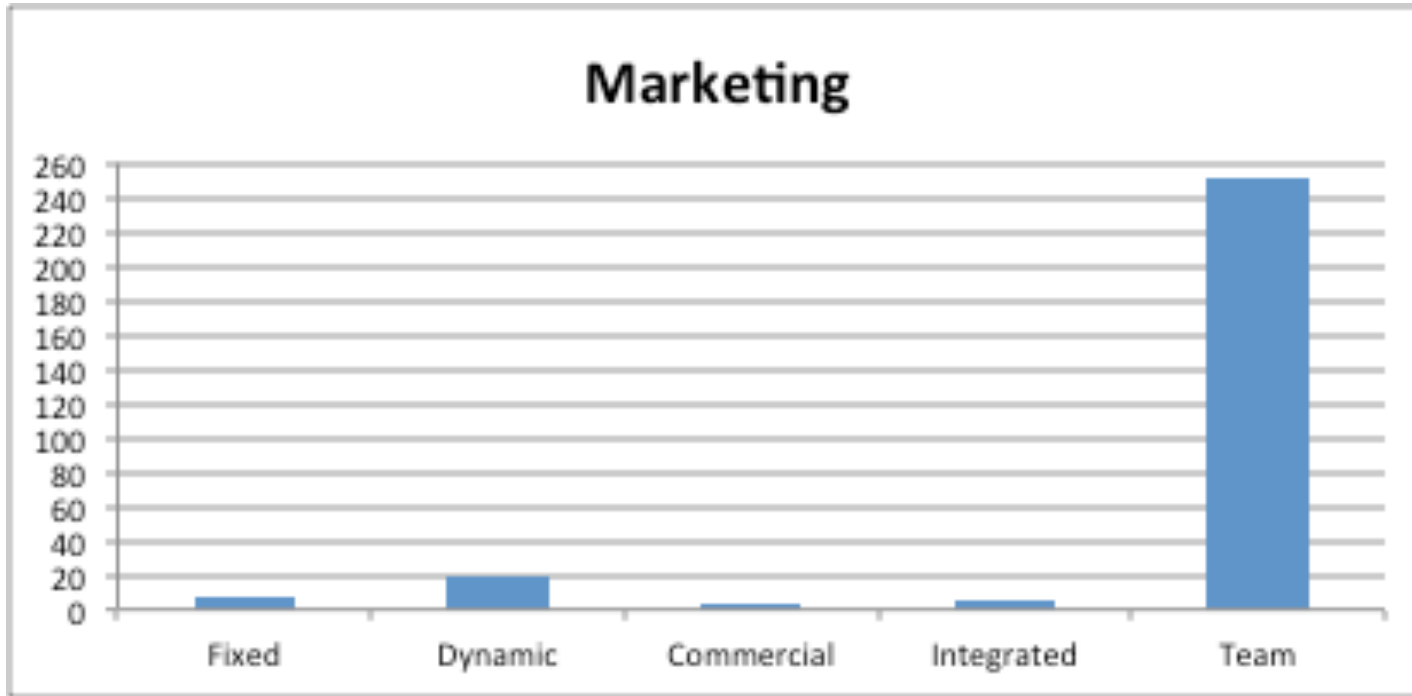
Figure 2: Number of incidences with location/type information

Count of Count (hr:min:sec)	Brand				Grand Total
Describe the type and nature	Centrebet	TAB	The Star Casino	Tom Waterhouse	Grand Total
Lockerroom souths				7	7
Manly Jersey	153			3	156
On Screen pop up				5	5
Rotating field banner		19			19
Souths Jersey	4		91		95
TVC				4	4
Grand Total	157	19	101	9	286

Figure 3: Total screen and number of incidences by brand

Centrebet	00:14:21	157		
TAB	00:01:08	19		
The Star	00:08:18	101	00:27:26	00:26:49
Tom Waterhouse	00:03:39	9	02:46:44	02:46:44
			16.45%	16.08%

Figure 4: Number of incidence of sports betting brand advertising by form (1 - fixed, 2 - dynamic, 3 - commercials, 4 - integrated, 5 - team sponsors)



## Appendix B- Example Qualitative Analysis Content Analysis Coding Sheet (Souths vs Manly)

Game	Time	Brand	Quote	Brand community	notes
Souths Manly	0:20:57, 0:12:36, 0:15:21, 0:23:20, 0:24:50	TW	Have \$25 or more on tonight's match and if any player is sent to the sin bin, I'll give you a \$50 bonus bet on tomorrow's racing	Rituals and traditions	Sports gambling merged
Souths Manly	0:20:57	TW	There is no love lost between these two sides and tonight I expect it to be a firey encounter...Manly, they have a great record in the finals but the bunnies they've won 4 out of their last 5	Consciousness of kind	Where does commentary stop and marketing start. Use of slang and football terms.
Souths Manly	2:44:09	TW	Here's Tom Waterhouse with his thoughts	Rituals and traditions	Setting himself up to be a part of the scenario. See football, think Tom Waterhouse
Souths Manly	2:44:09	TW	The roosters lead the league in attack and defence, but I like the knights. Wayne Bennett's record in finals footy... The star of the game, well that will be Sonny Bill and that's why I've got a terrific offer for all my clients.	Consciousness of kind	Showing his knowledge of the game. Creating an interrelationship between himself and his 'punters'
Souths Manly	2:44:09	TW	SBW on screen	Consciousness of kind	Colloquial football terms that only football fans would understand.
Souths Manly	0:12:36, 0:20:57, 0:12:36, 0:15:21, 0:23:20, 0:24:50	TW	How do I know what NRL punter's want? You tell me.	Moral responsibility, Consciousness of kind	The people's bookie. The thought that Tom is one of us. He is looking out for his clients
Souths Manly	0:20:57, 0:12:36, 0:15:21, 0:23:20, 0:24:50	TW	Back your team with me, at Tom Waterhouse.com	Moral responsibility, Consciousness of kind	Up to date gambling option for your specific code. Accessible whilst watching football

**DISCUSSION GUIDE**

INTRODUCTION:

*Introduce yourself*

- *Explain the purpose of the group and what is expected of them*
- *Remind them it is being recorded, and reassure them about confidentiality etc (make sure you have all the necessary consent forms)*
- *Check whether they have any questions*
  
- *Remind participants they can withdraw from data collection at any time*
  
- *advise them that they will receive incentives at the end of the discussion*

DISCUSSION ABOUT GAMBLING, AND SPORT

*We are going to talk about Australian sport, and its relationship with gambling*

*What sort of words/feelings do you think of when you think about sport and gambling?*

*[Prompt: positive and negative thoughts; sponsors]*

*[Activity: ask them to brainstorm some words on a piece of paper]*

*What type of people bet on sports? How would you describe them?*

*What do you like about sports betting? What do you get out of it? What are your main reasons for betting on sport?*

*What don't you like about sports betting?*

*Can you describe how you think gambling and sport relate to one another?*

*Is gambling/sports betting a social thing or something you do on your own?*

*When do you gamble – can you describe how you go about it?*

*How does gambling/sports betting make you feel?*

*What value do you get out of gambling/sports betting? What are your main reasons for doing it?*

*How do you relate to other people who gamble/bet on sports?*

*Can you describe these people? Are they similar/different?*

*Do you share values/have things in common?*

*Is there a community around sports betting? If so, can you describe it?*

*Do you talk to other people about sports betting? What do you talk about? Is there rivalry/banter around sports betting?*

#### INFLUENCES ON GAMBLING/SPORTS BETTING

*Why do you think people bet on sports in Australia?*

*What do you think are the influences on gambling/sports betting in Australia?*

*PROBE – peers/friends*

- *society and social norms*
- *the Australian culture*
- *marketing (advertising/promotion, place - availability & opportunities to gamble)*
- *individual personality*

*Why do you think peer/friends influences gambling/sports betting?*

*How do you think peer/friends influence gambling/sports betting?*

*Why do you think society/social norms influences gambling/sports betting?*

*How do you think society/social influence gambling/sports betting?*

*Why do you think the Australian culture influences gambling/sports betting?*

*How do you think the Australian culture influence gambling/sports betting?*

*Why do you think marketing influences gambling/sports betting?*

*How do you think marketing influence gambling/sports betting?*

*Why do you think individual personality influences gambling/sports betting?*

*How do you think individual personality influence gambling/sports betting?*

*Which of these do you think has the biggest influence on gambling/sports betting?*

SPORTS

*Are you a fan of or ever go to games for the sports that you bet on?*

*Who do you go with to the games?*

*How often do you watch sports on TV?*

*How important is sport to you?*

*What sort of people like sports (focus on NRL & AFL)? Are they similar, different?*

*What attitude do you have towards other fans of sport/your team?*

*- Do you look out for each other/ share values?*

*What about fans of other teams?*

*- Rivalry / Banter / Tribalism*

*What about other people who gamble/sports betting?*

**GAMBLING BRAND PERCEPTIONS**

**BRAND RECOGNITION ACTIVITY**

**ISSUE EACH PARTICIPANT WITH THE SHORT SURVEY.**

**SHOW THE PARTICIPANTS THE MASKED GAMBLING BRANDS ONE BY ONE, AND ASK THEM TO RECORD ON THE SURVEY THE NAME OF THE BRAND.**

**- Do you recognise this brand – can you name the brand? MASKED**

*THEN SHOW THE PARTICIPANTS THE UNMASKED GAMBLING BRANDS ONE BY ONE. ASK THEM TO TURN OVER THE SURVEY SHEET AND ANSWER WHETHER THEY HAVE SEEN EACH OF THE BRANDS.*

*- Have you ever seen each of these brands? UNMASKED*

*THEN SHOW A SAMPLE OF GAMBLING BRAND ADVERTS ACTIVITY TO STIMULATE DISCUSSION [Show sponsor ads/examples: Tom Waterhouse, TAB.com.au, Centrebet, sportingbet, sportsbet]*

*What are some words that describe this brand/service?*

*Why do you think [sponsor's name] sponsors Australian sport?*

*What do you think about [sponsor's product/brand/service]?*

*Who do you think uses [sponsor's product/brand]?*

*Would you consider using this brand/service?*

*Have you used this brand/service?*

*How do you think [sponsor's name] fits with playing or watching sport?*

*What kind of person would use [sponsor's name]?*

*What do you think of those sorts of people?*

*- Do you think of yourselves as similar to these sorts of people? If so, how?*



**PROJECTIVE ACTIVITY – USE THE PERCEPTIVE MAP FOR EACH OF THE 5 GAMBLING BRANDS**

**MARKETING OF SPORT BETTING BRANDS**

*Where have you seen them advertised/marketed? (Tom Waterhouse, TAB.com.au, Centrebet, sportingbet, sportsbet)*

*Have you ever used these brands? (Tom Waterhouse, TAB.com.au, Centrebet, sportingbet, sportsbet)*

*What prompted you to use this particular brand Tom Waterhouse, TAB.com.au, Centrebet, sportingbet, sportsbet)*

*How often do you use them? (Tom Waterhouse, TAB.com.au, Centrebet, sportingbet, sportsbet)*

*Do your friends use these brands? (Tom Waterhouse, TAB.com.au, Centrebet, sportingbet, sportsbet]*

*What is the most important factor you consider when you use a sports betting/gambling brand?*

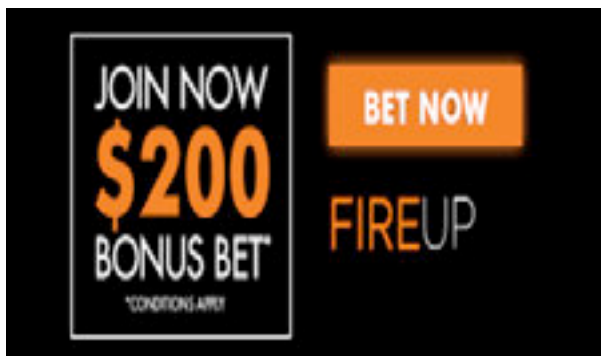
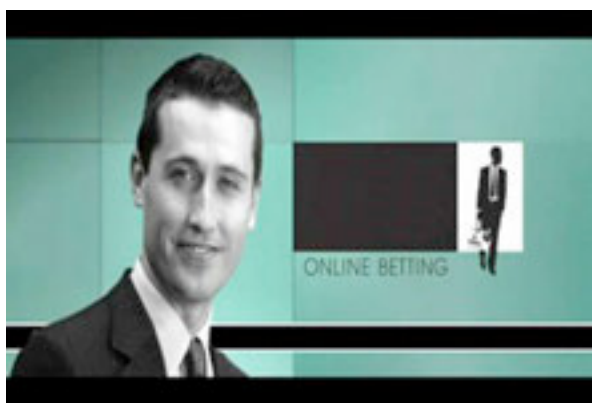
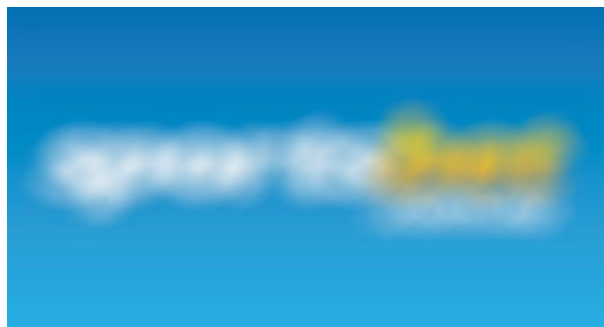
**WRAP UP**

*Thank participants for their time.*

*Ask if any final questions?*

**Appendix D - Masked and unmasked sports betting brand recall**

### Masked sporting brands



Unmasked sporting brands



Appendix E - Brand Recognition Activity

I'm going to show you some gambling brands that have the name covered up on them. For each one I'd like you to tell me what make or brand you think it is. Please don't worry if you don't know the make or brand.

1. ....

2. ....

3. ....

4. ....

5. ....

PLEASE DO NOT TURN OVER UNTIL ASKED.

And can you tell me whether or not you have ever seen each of these gambling brands? Have you ever seen...?

Visual 1: Tom Waterhouse    Yes     No     Don't Know

Visual 2: Centrebet            Yes     No     Don't Know

Visual 3: sportsbet            Yes     No     Don't Know

Visual 4: TAB                    Yes     No     Don't Know

Visual 5: sportingbet         Yes     No     Don't Know



