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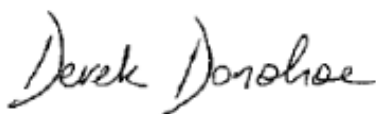
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National  
College *of*  
Ireland

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**Master of Science (MSc) Marketing**

**Title of Thesis:**

The impact of smartphone gambling applications on the creation of  
customer value among males, 25 – 44.

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**Supervisor:** David Hurley

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and Appendices)

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## **Abstract**

The internet has changed the landscape for bookmakers worldwide and there has been a big shift from bricks and mortar stores to online. As these online store websites have become successful, more and more research and revenue has gone into evolving these services.

The success of the smartphone has contributed to providing more value to consumers through many services including online banking, weather updates, video access (YouTube), social media, sport updates, messaging services and email. Bookmakers have recognised the opportunity of the creation of customer value through smartphone applications that provide the same services as online shops, but in the palm of the consumer's hand.

To create value for consumers bookmakers have realised that they now need not only a digital presence but also a digital customer experience that directly engages the individual consumer and provides value and insight into their products and services. Harnessing the power of smartphone applications has been central to this strategy.

This study's aim is to understand the impact that smartphone gambling applications have had in the creation of customer value among males, 25 - 44.

## **Declaration**

I, Derek Donohoe, declare that the research completed for my dissertation is entirely my own and all related research is referenced and cited. The references section of this dissertation includes the full details of all sourced work and their origins. This work has not been previously submitted by any other person to any college or university for the award of Degree or Master's Degree.

**Signed:**



**Dated:**

27/08/2018

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**Derek Donohoe**

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## 1.0 Chapter 1 – Overview

### 1.1 Introduction

As George Bernard Shaw once said: “In gambling the many must lose in order that the few may win”. This dynamic seems to be particularly prevalent in modern Ireland given that, according to (Rouse, 2016) writing in the Irish Examiner: “Irish people gamble more than €5bn every year. That amounts to at least €14m per day or €10,000 every minute”.

The evolution of technology and the internet over the past twenty years has been meteoric. It has changed the way the world communicates, both on a personal and industrial level. Smartphones and their larger derivatives, including tablets, are slowly starting to replace desktop computers and laptops in numerous areas and social media has become more than just a social arena for individuals; it has attracted companies into the online social sphere. This has naturally entailed a shift in marketing strategies for the new digital age and indeed, the digital customer.

As technology evolves it is becoming much easier to gamble and with the introduction of smartphone gambling apps such as PaddyPower, Bet365 and SkyBet, huge marketing budgets and advertising campaigns have followed. The net effect of this widespread exposure is increased incentivisation towards gambling as a *social* pastime. Recent research shows that many gamblers initially started gambling by playing poker with their friends in an offline setting, and from there it escalated to online gambling. Some gamblers felt it was easier to gamble online as in many circumstances their friends didn't have the time to maintain a regular schedule of games (Kim, et al., 2017).

The ability to make a wager on anything from horses, to football, to televised singing contests can now be made on the couch, on the bus, in the supermarket, in the coffee shop, with these activities actively promoted by effective and often ‘viral’ advertising campaigns.

The next step in the competitive online gambling environment is to provide more value outside of just the risk and rewards involved with the action of betting itself. This study will contribute to understanding this dynamic and explain how bookmakers are creating value through their marketing strategies which include online communities and relatable personas on social media.

## 1.2 Justification for the Research

Literature exists in several areas around the research question and there have been a lot of studies in relation to smartphone apps and gambling. In relation to smartphone literature, these include (Hutton & Rodnick, 2009) *Smartphones creating opportunities for smart marketing*, (Muzelle & O'Raghallaigh, 2018) *Mobile technology and the impact on consumer decision making*, and (Weng, et al., 2014) *Adapting to a mobile world: A model of smartphone use*. There have also been numerous studies on gambling, including (Gainsbury, et al., 2012) *Comparison of gambling behaviour of internet and non-internet gamblers*, (Gainsbury, et al., 2015) *Exploring gambling operators use of social media and latent messages conveyed*, (Griffiths, 2003) *Internet gambling: issues, concerns and recommendations*, (Hing, et al., 2014) *Exploring if gambling advertising increases gambling consumption*, (Wulfert, et al., 2008) *The role of money in the excitement of gambling*, and (Moore & Ohtsuka, 1999) *Predicting gambling behaviour and problem gambling from attitudes and perceived norms*. However, there have been no definitive study of what impact smartphone gambling apps have in relation to the creation of customer value.

There is academia dearth of scholarship focusing on the creation of customer value in the usage of smartphone gambling apps. Understanding what drives engagement and regular app usage gives a better understanding of why consumers have gravitated to using gambling smartphone apps and what value they perceive from their usage.

As well as the literature discussing different aspects of gambling, there is also related literature relating to value creation such as (Woodruff, 1997) *Customer Value: The next source for competitive advantage*, (Grover, et al., 2018) *Creating strategic business value from big data analytics*, and (Anderson, et al., 2006) *Customer value propositions in business markets*, and this literature has provided a foundation for this study. However, there is a clear gap in the literature. Studies generally look at the negative aspects of gambling, the issues with addiction and indirect problems because of gambling. Bookmakers have taken advantage of technological advances to provide more value to their customers, entice new customers and create a better product and service. This study is looking at the aspect of customer value creation that has delighted customers and led to an increase in usage and engagement with smartphone gambling apps.

Parke et al., (2014) claim that gambling is becoming normalised and, in many people's lives, a legitimate social activity. New marketing strategies and techniques are using social media to portray positive attitudes around gambling, gambling brands and their services. As such, consumers are liking, commented on and sharing social media gambling content daily which is increasing the exposure of gambling content to new audiences and sometimes under-age and vulnerable audiences. By providing enjoyable and entertaining content on social media, gambling companies are creating brand value and brand equity among followers and this has created a platform for exposure to persuade and incentivise consumers to download gambling smartphone apps and gamble as a source of entertainment.

This investigation intends to look at how bookmakers are creating value from numerous touchpoints to incorporate an experience of value from five different value creation variables using a Framework of Customer Value Creation (Shanker, 2012).

Woodruff (1997) defines customer value as: "a customer perceived preference for and evaluation of those products attributes, attribute performances, and consequences arising from use, that facilitate (or block) achieving the customer's goals and purposes in use situations". Value creation can be looked at from the supplier's perspective or the customers perspective. Customers perceive value from their experiences and the available alternatives. From the supplier's perspective, understanding customer needs will help attract and retain customers and to achieve a competitive advantage companies must understand their customers desires and innovate to deliver superior performance (Killa, 2017).

The research was instigated by the researcher's exposure to the use of gambling smartphone apps and the marketing communications that seem to have increased across numerous mediums over the past five years. The study will show that consumer value in gambling app usage has changed the landscape of gambling and attracted a new audience of gamblers and led to consumers gambling as a social pastime. The research will also shed light on how marketing strategies, specifically via social media, have become an integral part of value creation.

The potential implications of this research may also be applicable to a growing literature on the interrelationship between smartphone gambling apps and marketing beyond Ireland, such as in other high-saturation countries including the UK and Australia.

### **1.3 Research Question and Objectives**

The study's aim is to inquire; "What impact do smartphone gambling applications have in the creation of customer value among males, 25 – 44?" The purpose of the research is to ascertain the impact of these apps in creating customer value and the related strategies and service offerings that add to the value and experience.

The research results will show that consumers have become increasingly acclimatised to the online environment of smartphone applications and bookmakers have led the way in many respects by understanding their consumers and the creation of value in the products and services they provide. This will have led to increases in user numbers and money being gambled. It also may have resulted in higher consumer involvement with less of a cognitive realisation as to the reasons why and, indeed, the empirical extent of their gambling activity.

Five research objectives have influenced this study and provide the structure for this dissertation. The objectives are:

- To investigate the functional value of using gambling smartphone applications
- To assess the cost/sacrifice value of usage
- To evaluate relationship value of using the apps
- To show how co-creation has impacted how companies create value
- To understand the brand value associated with app usage

### **1.4 Dissertation Structure**

This dissertation is structured to ensure that all areas are easy to follow, and the content is as clear and comprehensive as possible. Chapter two consists of the related literature surrounding gambling, smartphone usage and value creation. Chapter three presents the research methodology which includes the research philosophies, research approaches, strategies, and choices while also discussing data collection, samples and limitations. Chapter four analyses the findings of the study including the pilot survey, the targeted demographics survey data, and includes the questions in relation to the creation of customer value. Chapter five discusses the conclusions and recommendations of the research followed by the significance of the findings. All survey data can be found in the appendices, which include the pilot study, the full survey study and the extracted target demographics survey study.

## 2.0 Chapter 2 - Literature Review

### 2.1 Statistics of Relevance

A recent research report by Deloitte (2017) on smartphone usage in Ireland found some very interesting statistics: 90% of Irish adults have a smartphone, with smartphones being used for purposes traditionally attributed to PCs and laptops; Irish adults look at their mobile phone, on average, 57 times a day compared with the European average of 41 times; 16% of Irish people admit to looking at their phone more than 100 times a day against a European average of 8%, while; 47% of Irish people admit to looking at their phone “too much”.

The report also finds that 6% of Irish smartphones users place or redeem a bet at least once a week and the number of Irish smartphone users who use in-store mobile payment solutions (including gambling) has increased by 7% to 19% since 2016. Although the percentage using mobile payments remains relatively low, they expect to see similar year-on-year increases in usage. (Deloitte, 2017).

According to Statista<sup>1</sup> –the number of smartphone users in Ireland is increasing year on year; a trend that is forecasted to continue to 2022. With overall usage increasing from 2.97 in 2015 to over 4 million in 2022. This would forecast an increase of more than a million smartphone users from 2015 - 2022. While their study was not specific on gender or age, it highlights the continuing prevalence and near-ubiquity of smartphone use in Ireland.

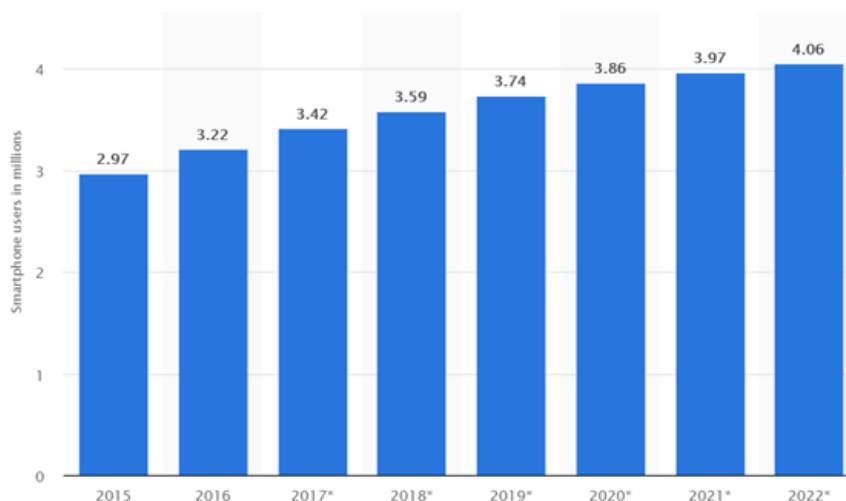


Figure 1 - The Statistic Portal – Ireland’s Smartphone Usage Growth (*Statista, 2018*)

<sup>1</sup> The Statistics Portal is a company that creates Statistics and Studies from more than 22,500 sources. See <https://www.statista.com/statistics/494649/smartphone-users-in-ireland/>



According to Paul Rouse from the *Irish Examiner*:

The growing popularity of gambling online is readily apparent by the rising profits made by companies in this area. The growth of online gambling offers an entirely new dimension, however. It is a dimension that means that, if you own a smartphone, every room, every public space is a betting shop. For the perhaps 40,000 Irish people who have a gambling addiction, this presents endless ruinous possibilities. (Rouse, 2016)

As of 2008, there were 1,365 betting shops operating in Ireland, which reduced to 948 in 2015 (Rutland Centre, 2017) and further, to 862 as of August 2017 (McCárthaigh, 2017). In the UK, smartphone gambling has grown faster than every other form of gambling in 2016 – 2017. Nine million people were estimated to have gambled in the UK last year and more than half used their smartphone or tablet (Beioley, 2018). This clearly shows how the business models of gambling companies are migrating to the online sphere, with twenty-four-hour access from practically any geographical location within Ireland and the UK.

Location of stores may have been a factor in the success of bookmakers in the past but now with the transition from bricks and mortar stores to online stores and apps, many others have followed. Now that location isn't a factor when accessing the services of bookmakers, the next competitive advantage is the creation of customer value through their smartphone gambling apps. How companies use their integrated marketing communications strategies, including social media and online advertising may be what differentiates the competition and adds perceived value from the customers perspective.

## **2.2 Gambling App Provider Platforms and their reach**

Bookmakers are aware of the popularity of gambling smartphone apps and it is a constant battle between rival businesses to innovate and attract clients by creating more and more value for the consumer. Up until recently, app stores did not allow gambling apps on their platforms, which meant that consumers had limited access. The platforms previously felt that they were not in the best interests of consumers.

The more recent access to gambling apps through the largest app provider platforms has allowed the public to access these apps from just a few clicks. For some, this is quite concerning considering that Wicker (2018) argues that interrelated strands of artificial intelligence,

psychology and philosophy now result in the smartphone being used as an extension of the user's mind rather than a simple object. As such, a *thought* may become a *bet* due to ease of access. Muzelle & O'Raghallaigh (2018) mirrors this sentiment by offering that smartphones are cognitive technologies that expand the abilities of *human consciousness*.

The Google Play Store and Apple App Store account for approximately 95% of the app market but their audiences are somewhat different. Apple iPhones are the only smartphones that run the Apple operating system, whereas the Google Android operating system can be found on the majority of all the other branded smartphones in the world. As a result, the Apple App Store attracts a different audience, an audience who likes exclusivity and who may hold the Apple brand to a higher mark than all other players in the market. They could be correct in doing so as Apple are currently the number one brand on the 'Best Global Brands' list 2017. However, Google aren't too far behind, in second place (Interbrand, 2017). Their global reach and access to a huge market has allowed bookmakers to use Google and Apple's reputable platforms to distribute their smartphone gambling apps. App Store reviews can potentially increase demand, and the satisfaction from existing users has a knock-on effect, which can increase interest in the apps from potential new customers. It is argued that apps with positive user reviews which are offered by reputable sellers, such as Google and Apple, create trust among consumers (Gunwoong & Raghu, 2014). This may add to the acceptability of smartphone gambling apps in society.

Hutton & Rodnick (2009) suggest that consumers of smartphone apps individually select and download apps that feel 'personal' to them. People view these apps as non-intrusive and as a result, value the app functions and engage and interact regularly with them. Husson (2016) also claims that app users spend 88% of their time on only 5 apps and in addition to this, users spend 82% of their time on apps rather than using their smartphone web browsers.

It is well known that consumers follow and are loyal to brands, many stay loyal to brands as the brands speak to their personalities and associations. According to Aaker (1997) brand personality can be defined "as the set of human characteristics associated with a brand". A study by Azizihaa et al, (2014) argues that the motivation to purchase Apple products comes from people's self-awareness, whether that be self-awareness from the perceived perspective of others or the self-awareness in a private setting, from a personal perspective.

Both Apple and Google are part of the consumers experience in creating value for customers when accessing gambling apps on their platforms. They also allow users to rate and comment on users experience of using the apps which can be a valuable feedback tool for companies.

These platforms have helped distribute these apps on the biggest markets and it is the companies job now to keep providing value through their gambling apps. Their affiliation with these app stores has elevated their status and accessibility. This no doubt has added to the perceived creation of customer value.

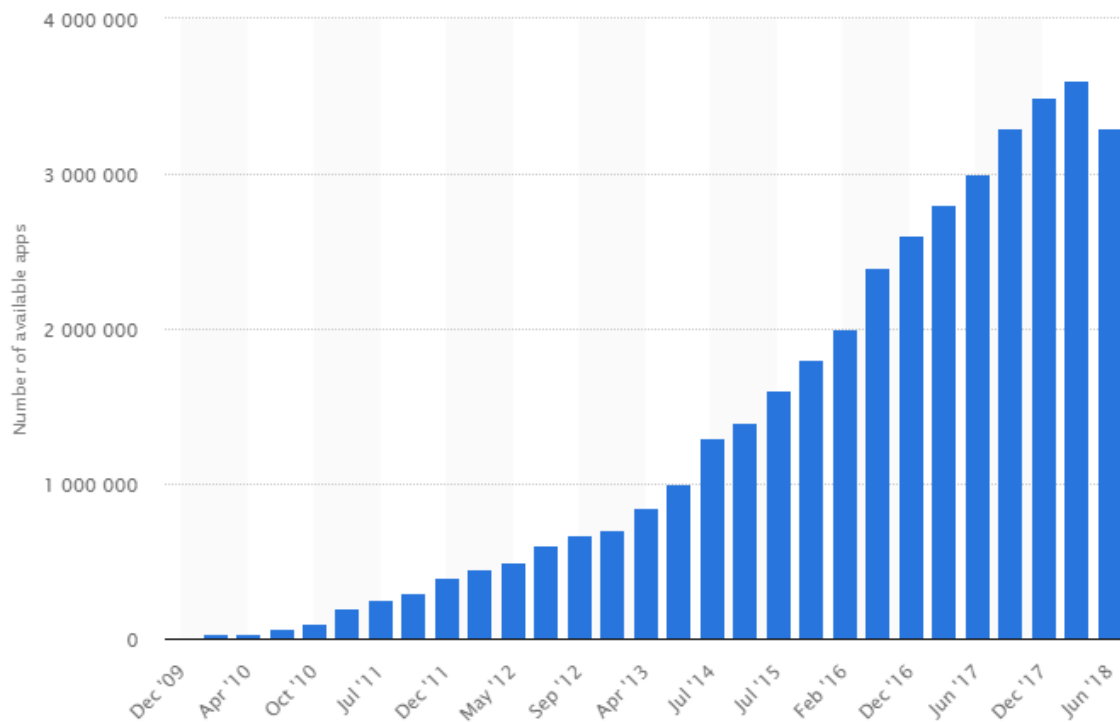
### **2.2.1 Google Play Store for the Android Operating System**

The Google Play Store is Google's portal and store for all Google's online apps, music, books, movies and games and it is the largest smartphone application store in the world. If one possesses an Android phone by many of the smartphone manufacturers worldwide they will automatically find the Google Play Store app installed on the device.

While Google has an app for each one of their services, the Google Play store is the umbrella under which all their services can be found, purchased and downloaded, with many apps free to consumers. Google allows third party developers to create apps and distribute them on the Google Play Store. Many companies have developed apps for their own service offering and the majority can be found on the Google Play Store, if Google approve their app and it doesn't go against their rules. Choong et al, (2016) believe that branded apps on smartphones are like billboards for users and as they are viewable on personal devices, they are a non-intrusive way to engage consumers and provide value. Also, branded apps may be among the most accessed apps on the Play Store and the app charts provide another opportunity for companies to market their apps through these platforms.

The availability of apps on the Google Play Store has increased substantially over the years. Figure 2 shows the huge increase in available apps on the Google Play Store from December 2009 to June 2018 with over three million apps now available. As companies have realised the opportunities available to them by having their own app, they have invested to try and exploit these opportunities. These figures will more than likely increase over the coming years as more

companies realise the profit that can be made by having consumers access their products and services at the touch of a button at all times.



**Figure 2** - Number of available applications in the Google Play Store from December 2009 to June 2018 (*Statista, 2018*)

As of August 2017, the Google Play Store, started to allow gambling apps on its smartphone app platform. This has allowed a vast audience to access online gambling smartphones apps than ever before. Prior to that, companies had to distribute their apps through third-party channels. Google had previously stated that they didn't allow Smartphone apps that facilitated online gambling. (iGamingBusiness, 2017). However, they have since changed their stance and all the top gambling applications can be found on the platform.

Figures from the Google App Store show that in the first 6 months since August 2017, well-known bookmakers - Paddy Power, Ladbrokes, Bet365, BetFair, William Hill, Sky Bet and Coral - have between one hundred thousand and five hundred thousand app downloads each. (Google Play Store, 2017).

While the platform doesn't provide an exact figure for downloads, one can clearly see the huge demand for these apps considering the number of downloads they have stacked up since their introduction on the Google Play Store in less than a year.

### 2.2.2 The App Store using iOS - Apple Operating system

The Apple App Store preceded the Google Play Store and it is specific for Apple products such as iPhones and tablets. Apple have stringent procedures on what apps make it onto their app store and only companies who follow their rigorous requirements can display and distribute their apps on their platform.

Along with the Google Play Store, the number of available apps in the Apple App Store have also increased substantial over the years.

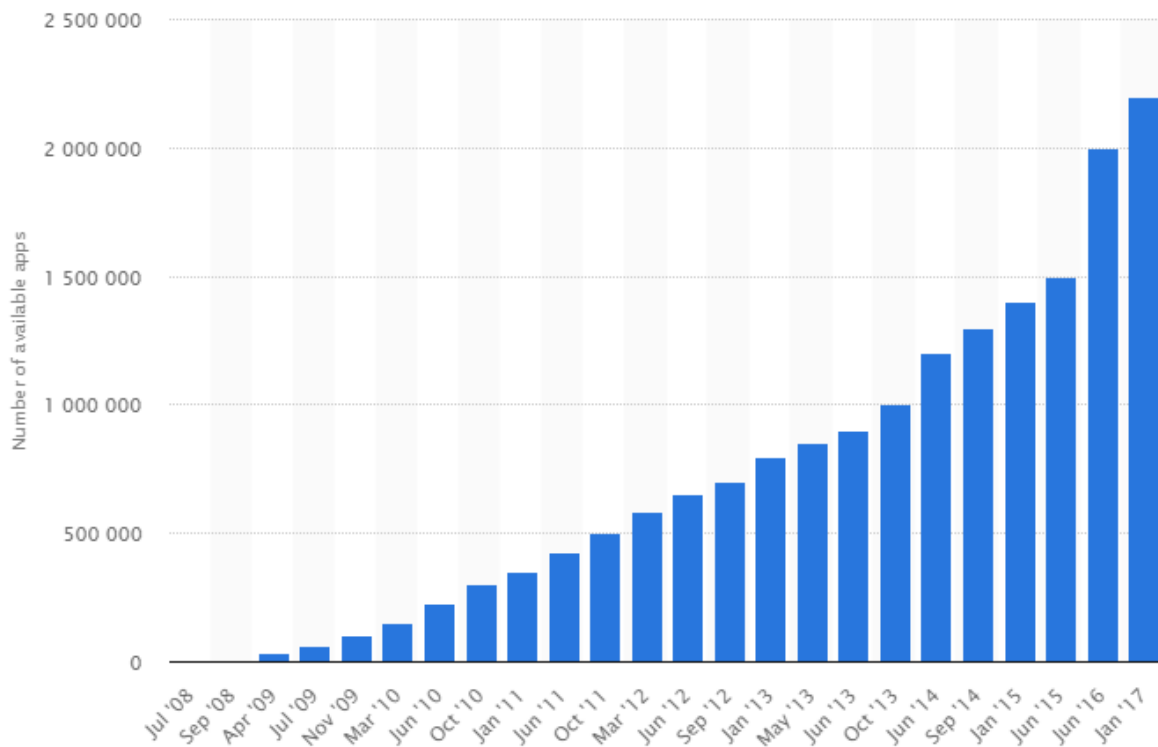


Figure 3 - Number of available apps in the Apple App Store from July 2008 to January 2017 (Statista, 2018)

Figure 2 shows the huge increase in available apps on the Apple App store up until January 2017 from July 2008. With over two million apps available in January 2017, you can be sure that figure has also increased again over the past year and a half.

Sales of devices such as iPads and iPhones are key players in the company's profitability, but Apple's business model was also generated to make profit using the App Store. Through the platform, Apple has become one of the leading companies in pursuing co-creation with app developers and users (Lee, et al., 2017). As such, it has more control over the smartphone app quality and can take longer to get apps approved. However, this is to provide users with apps that are free of bugs and malware. For Apple to keep a high level of customer satisfaction they must ensure that their quality procedures are as high on the apps as it is on the internal software and external hardware.

In comparison to Google, Apple approved apps often do not include ads. This is mainly due to the fact that many apps that are available on the Apple app store must be purchased at a cost to the consumer. On the flipside of that, the Google Play Store may not charge a fee for the same app, but they may include ads within the app itself. The consumer can usually purchase the app to remove the ads but either way Google is making money and profiting and so is Apple.

Ultimately if gambling companies want to access the largest app markets in the world they must not only be present on these platforms but provide apps that are easy to use and be of value to consumers in the long term by providing regular updates and relevant content. App Store reviews are helping consumers trust the apps, and their engagement with their potential customers through the reviews shows that they are actively trying to meet the needs of consumers the best they can.

### **2.3 Entertainment as a value mechanism**

People use smartphones and smartphone apps as a source of entertainment (Weng, et al., 2014) and they can have a knock-on effect in relation to topics of discussion offline as well as online.

As such, the central element to what some bookmakers are trying to portray is that they are a source of entertainment; a place where not only can you make a bet and win money but also have fun and engage with likeminded individuals and share experiences around sports and

betting – the very kernel of the social media experience. By understanding their target markets, gambling companies tap into different audiences and entertain through numerous touchpoints, such as through social media channels like Facebook, Twitter and Snapchat, which are at once complimenting and replacing traditional marketing platforms, such as TV and print.

As smartphones have become more ubiquitous, it has allowed users to access gambling much more readily, while enhancing its standing as a more socially acceptable practice (King, et al., 2009). Adolescents in particular are proficient in the using smartphones and technology and this makes them more likely to be exposed to online advertisements and promotions by bookmakers and their services (King, et al., 2009). This is worrying for the younger generation and further research would be beneficial in finding out how much of an impact this exposure has on a younger audience compared to the targeted demographics in this study.

According to a survey conducted by Edelman, a PR group with 4,000 people polled, 80% of people born between 1980 and 1995 want brands to “entertain” them with their content. The survey was conducted from 11 countries including the USA, the United Kingdom, India and China. It also mentioned that 40% of consumers want brands to co-create products with them to further narrow down and hit exact consumer needs and wants, while 33% also want brands to engage with them on social media and answer any enquiries they may have (WARC, 2012).

While entertainment creates hedonic value, the way in which bookmakers are creating this value as a touchpoint to an alternative persuasive action may not be fully realised by consumers. However, this is exactly what bookmakers want to happen and if consumers are happy to be entertained while also being exposed to gambling marketing content then that is their choice and the intention of the value creation in the first place.

## **2.4 Personas to create identifiable value for a target market**

The word ‘Persona’, can be used to describe the way in which people and their personalities relate to society and how they play a social role to act in a recognised or predefined way. It is suggested that the association with a fictive persona, not an actual person, that provides a brand with value (McCracken, 1989).

As gambling companies strive to become market leaders, this becomes challenging from the company's perspective as they essentially offer the same products in similar areas. The key for many of these companies is differentiation and being unique in their offering. As a result, some gambling companies have created online personas, cultural stereotypes with certain tones of voice on their social media channels to connect with their target market and to become an online entertainment hub where people identify with the brand personality (Sundar & Noseworthy, 2016). While in the sports betting market they may be talking to the same people, possibly the male macho culture in many respects. However, it may not be what the companies say, it can be *how* they say it and by whom that creates the exposure and the connection to the customer which offers value.

It has been suggested that business performance in service markets counts routine as hugely important to consumers (D'Adderio, 2008). This would have a big impact on how a business markets their services to consumers especially online. The benefits to using a service should be standardised to allow repetitive performance which consumers may associate with brand experience (D'Adderio, 2008). Brand Persona has personality traits which link in with their target market and customers expect that personas to be consistent and routinely engaging with likeminded content and entertainment (Diona & Arnouldb, 2016).

Brands are trying to become more sharp-witted, clever, surprising, bold, fearless, confident and sometimes shocking to win over consumers. Research suggests that commercial personas do three things: (1) acts as the embodiment of a company or surrogate; (2) creates expectations of what the firm is about and the relationship someone can expect from the company; and (3) delivers identifiable qualities that customers can relate to which can lead to forming attachments to the company. (Stern, 1988)

Paddy Power has one of the largest online betting operations in Ireland and the UK and they are expanding across new markets throughout Europe. Some would say, they are the most innovative bookmaker in the market, adopting a jovial marketing strategy that speaks directly to the consumers' shared sense of 'harmless fun'. This dynamic is neatly captured on the 'About Us' page of the Paddy Power website, where the first line states: "If we haven't yet done the marketing equivalent of running up and slapping you in the face, then please allow us to introduce ourselves!" (Paddy Power, 2018). More importantly, Paddy Power have acted as



‘early adopters’ with regard to this type of marketing strategy and have quite often set the parameters for ‘jovial’ social media engagement with customers. They were the first gambling company in the world to have an Android, iPhone and iPad gambling app (Kennedy, 2010).

Some gambling companies are pushing the boundaries and entertaining customers to create an affiliation to the brand and create more value for the consumer. In Paddy Power’s case, they are most certainly setting the pace in this field by being always accessible online, fun, entertaining and by creating content and engaging with their customers conversations. As such they have created an online persona that not only offers an entertainment value but also an innovative and informative persona that hooks consumers in to gamble directly through their smartphone from numerous touchpoints, whether that be through the gambling app itself or the social media channels which are linked to their betting landing pages. Bookmakers are normalizing gambling through social media by including events and news among their content within a broader social context. They are positively framing their messages to encourage gambling and are highlighted the winning aspect of gambling (Gainsbury, et al., 2015).

These online personas create value by engaging with customers about everyday current affairs which may include the weather, celebrities and sportspeople. These persuasive and well calculated means of customer engagement are what can turn a potential customer into an active gambler within a matter of minutes. With the explosion of online gambling and smartphone usage, it will no doubt be the battleground for firms in the coming years in attracting customers and entertaining them to create brand loyalty and ultimately repeat business.

## **2.5 Marketing strategies to create perceived value**

In the past, advertisements for gambling services and products were restricted in more traditional marketing arenas. Restrictions were put in place to stop excessive gambling and to try and stop the normalisation of gambling. This was especially the case in vulnerable areas of society. However, online access to smartphones apps and gambling websites has enabled companies to use social media to drive traffic to their websites with fewer constraints compared to traditional methods (Gainsbury, et al., 2015). Pop-up ads and push notifications have contributed to the success of enticing users to make a wager. Those who have downloaded a gambling app have in some cases signed up, unknowingly, to receive random push notifications promotions without opening their gambling apps or any website. These push notifications can

appear on your phone when you're making a call, sending a message or viewing photos. The apps can control aspects of smartphones, and scheduled promotions infiltrate and hijack your space without you actively seeking their services. It has been shown that online advertisements have had a large impact on gamblers increasing their response to gambling promotions (29%) compared to those who were not using digital methods to gamble (23 %) (Hing, et al., 2014). This means that online advertising is a more affective form of marketing for online gamblers as their smartphone gives them quick access to make a bet.

It has been argued that consistent exposure to marketing by gambling companies has led to a perception that gambling is a harmless activity, increasingly accepted as a 'normal' social pastime (Moore & Ohtsuka, 1999). Online marketing of gambling products and services has glamorised gambling and due to targeted advertisements, it is hard to monitor and regulate (Gainsbury, et al., 2015).

It has been reported that young men, feel like they are being overwhelmed by gambling advertisements, which are known to specifically target this demographic. It has been shown that these advertisements can trigger people to gamble, cause regular gamblers to gamble more and can entice problem gamblers to gamble against their better judgement. Some researchers have argued that marketing efforts have provoked young men to consume gambling products and services by incorporating a sports fan culture into their strategies and as a result, lure young men into the gambling environment (Deans, et al., 2017).

With huge marketing budgets bookmakers are marketing their services on several social media platforms such as Facebook, Twitter, Snapchat and YouTube to try and offer value and entice people to download their apps. Companies are also marketing their services on TV (before, during, for in-play betting and after games) and on billboards with stunt marketing efforts to create a buzz and to create exposure of the fact you can download and bet on practical anything from your smartphone using their apps.

Thomas (2014) reports that young gamblers are more interested in betting on sports than horse racing (long seen as the bastion of offline gambling in UK and Ireland), with many especially interested in football betting. Also, Ladbrokes reported in 2014 that they believed that horse racing would only account for one fifth of bets in their betting shops in 2015 which would show

a decline of 40% from 2005 (Thomas, 2014). It would be interesting to know what these figures are now considering the popularity of smartphone gambling apps today.

The significance of targeted adverts during half-time intervals provide a short window of opportunity to take action and gamble on a live event such as the next goal scorer. These gambling options are only really viable in an online environment and can compel people to bet instantly and at short notice. This is something that is pretty unique, recent and emblematic of the mutually constitutive relationship between online advertising and smartphone access.

## **2.6 Social Media – A touchpoint of valuable interaction**

It is not only television and online advertisements that are affecting betting decision making, social media and social media advertisements also influence users to make decisions based on their exposure to gambling incentives and online brand communities. For example, Paddy Power, as of January 2018, has over 1.5 million followers on Facebook and has 642 thousand followers on Twitter. Recent statistics have shown that Facebook, as of November 2017, has 1.15 billion daily active users on smartphones and it also shows that 88% of its revenue comes from mobile ads (Smith, 2017).

The impact of smartphone technology and social media tends to interrupt tasks. Interruptions can occur by notifications which are unsolicited, such as a friend request on Facebook or when the users mind drifts from their task to a smartphone related activity. These alerts prompt the user to interact with the device. (Melcher, 2013). It is argued that hearing smartphone notification alerts or vibration alerts can shift a person's mindset and distract them from their primary task. These notifications prompt irrelevant thoughts which affect performance on the primary task at hand (Wilmer, et al., 2017). Leiva et al, (2012) explored smartphone interruptions and suggested that completing a task in one app can be delayed by up to 400% due to interruption by other apps within the smartphone. Social media engagement and advertisements have allowed gambling apps to interrupt a person completing a task by entertaining them or by incentivising them to make a bet within social media apps.

Gambling companies realise the opportunity that social media have provided by getting in front of an audience of their target market easily and efficiently. They use social media as a tool of

persuasion to interrupt the users mind promoting their services and providing an external app value creation that links back to their own smartphone app.

Examples of entertaining and informative social media Twitter content is provided in figure 4:

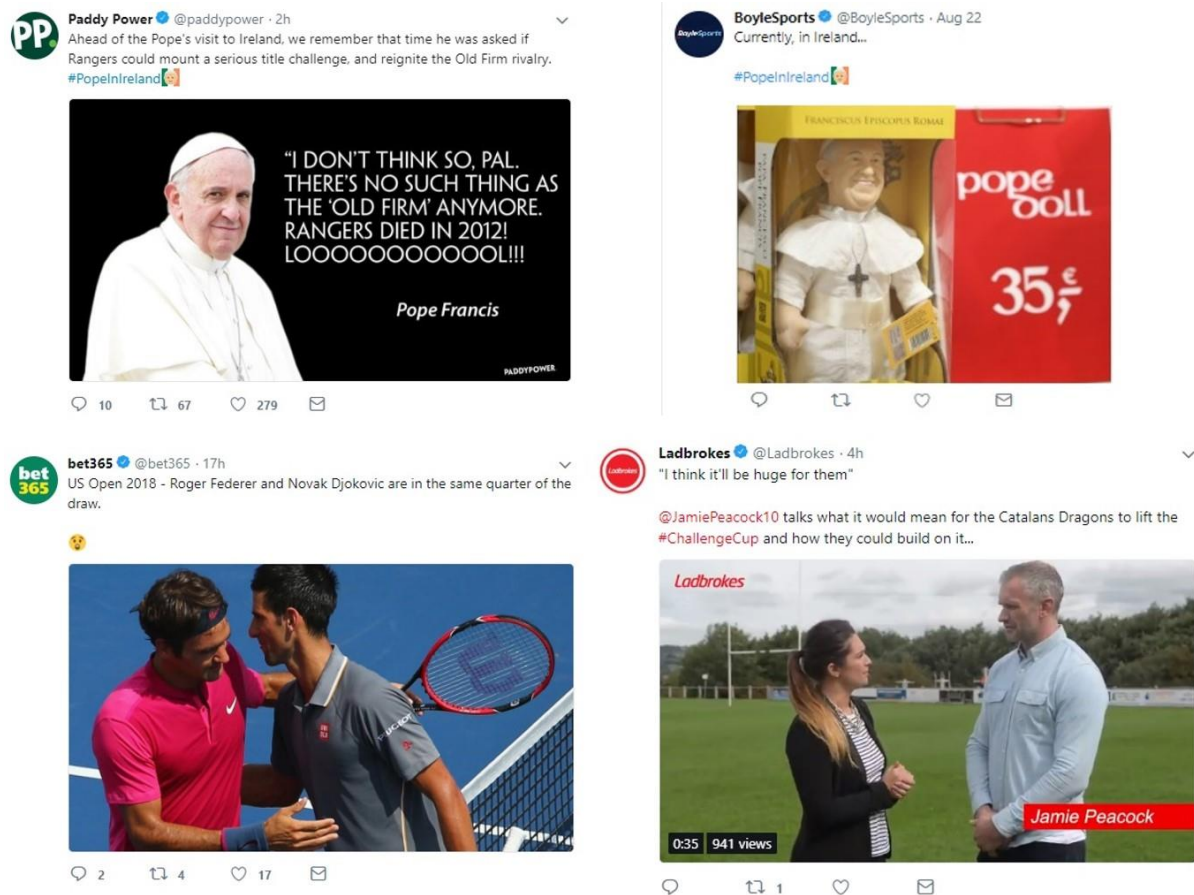


Figure 4 - Screenshots of social media content through Twitter from four of the largest bookmakers in the UK and Ireland

As you can see from figure 4, some gambling companies market themselves better through social media than others. Their engagement through comments, retweets and likes can be seen at the bottom of the content, with Paddy Power leading the way with large engagement of their social media posts. They engage with their followers online to entertain and provide value through informative news and content. This is all part of the strategy to eventually persuade followers to gamble.

Gambling companies have a huge regular and returning audience to influence, advertise and promote their services through social media. But according to billionaire investor and philanthropist George Soros, it is at the detriment of society;

Facebook and Google have become obstacles to innovation and are a menace to society whose days are numbered.... Mining and oil companies exploit the physical environment; social media companies exploit the social environment.... This is particularly nefarious because social media companies influence how people think and behave without them even being aware of it.... Social media companies deceive their users by manipulating their attention and directing it towards their own commercial purposes and deliberately engineer addiction to the services they provide. The latter, can be very harmful, particularly for adolescents (Solon, 2018).

Considering the time Irish people spend on their smartphones and the fact they check their smartphones 57 times a day (Deloitte, 2017), this is a worrying statistic and has clear implications for the increasing prevalence of online gambling.

## **2.7 Measuring Analytics to understand customers preferences and to improve User Experience**

To better understand customer preferences and online actions, gambling companies are using online analytics tools to try to offer more value to what they do and what they offer through their apps. To create a better and seamless experience while using their smartphone apps, innovative gambling companies are looking to differentiate and create a long term competitive advantage through value-justified data which would feed into the customer experience.

For in-play betting, apps need to be dynamic in their offering and respond to changes in the market in seconds to meet the needs of customers and ensure they can entice them with live options from sports events. The challenge of developing and managing live environment data and displaying it quickly for the customer is huge but by doing so they can provide valuable real-time odds and offers that may entice customers to impulse bet and inform them of the possibilities of reward.

Creating and managing customer relationships is difficult but knowing customer preferences from their actions and interests creates a unique experience in app usage and allows companies to delve into the persons preferred way of gambling and can allow persuasive messages to become more successful and profitable.

Data analytics is used to create value in many areas which can include, process improvement, market enhancement, organisation performance improvement, service and product innovation and customer experience. It can also help in the creation of symbolic value like reputation and image (Grover, et al., 2018). Capitalising on opportunities is what drives business so gambling companies need to harness their data and integrate it with their smartphone app in seconds to offer value where value may not be visible before.

Customer satisfaction is the driver of value creation and this can lead to customer retention, increased trust and brand loyalty. Relationship marketing theory suggests that company interactions through several channels can impact brand loyalty and positively create a connection to a company and its offering. It is also suggested that customers who were acquired through digital channels can be more loyal and active due to their perceived connection with the company (Kitchens, et al., 2018)

Through analytics and monitoring consumer behaviour bookmakers can update and create new versions of their apps to allow consumers to better navigate their way through the interface; thus, providing a more facilitative environment for consumers to find what they are looking for and engage in a more valuable user experience. When a customer makes purchases online, they select a product to meet their needs. If the process of acquiring that information takes considerable effort, then decision making using that information is negatively affected (Lohse & Johnson, 1996). That is why it is hugely important for gambling companies, in this instance, to streamline their product categories and make it easier for customers to use their services and gain access to their product suite.

## 2.8 Artificial Intelligence and the future

Gambling companies are using technology, marketing, social media and in some cases artificial intelligence to provide smartphone users with entertainment, products and attractive content in order to create touchpoints that link to their online store or app. Smartphones can understand speech, complete words and sentences using predictive text and can access your location through GPS. In addition, machine learning capabilities entails that companies can target consumers in specific locations, using certain words and images derived from the consumers' past actions and assumed preferences (Makridakis, 2017).

Facebook uses AI to suggest friends and events from the activity of your current friends. Online stores like Amazon suggest other products from your purchase history or from what other similar customers purchased. A survey conducted by *The Economist* with over 200 business executives stated that in the next three years their companies will be actively implementing AI (The Economist, 2016). The study also showed that over 40% of executives surveyed think that AI will start to replace traditional human-led jobs in the next five years and believe that their roles as executives will be substantially changed in the same timeframe.

AI mimics the habits of people and then learns from their interactions. With gambling smartphone apps, companies understand user preferences and as a result arrange the user interface to better suit individual consumer needs from their usage behaviour. According to an article in *The Guardian*, Gambling companies are spending millions on making their services more addictive. They are profiling their customers and every click from users is scrutinised. This strategy is used to maximise profit with targeted ads set up to hook users in by using targeted promotions in areas that they know the consumer has an interest in. The gambling industry pocketed over £14 billion in 2016 in the UK and of that amount £4.5 billion was from their online services including their smartphone apps. (Busby, 2018).

AI within gambling will be huge in the future with more sophisticated data management and machine learning capabilities coming along every year. While this may offer value in some areas for consumers, ultimately it will be set up to maximise profit for gambling companies. This could be to the detriment of gamblers, specifically those who have problems gambling or those who may be easily influenced by their business strategy.

## **2.9 Revenue – Value exchanged for a justifiable risk/reward**

People gamble to win money, of course, but it's not the only reason. According to research by Mark Griffiths, a psychologist who specialises in behavioural addictions at Nottingham Trent University; "In a survey of 5,500 gamblers, the prospect of the chance to 'win big money' was the strongest factor. But it was followed closely by 'because it's fun' and 'because it's exciting.' People are buying entertainment." (Griffiths 2016; quoted in Baraniuk, 2016)

A study by Wulfert et al., (2005) argues that money is the driving force that generates excitement and physiological arousal. Their study used college students to watch a taped horse race with half wagering on the outcome and the other half simply predicting the outcome. The results showed that the heart rates of those who predicted the outcome rose during the race but those people who had had made a bet on the outcome had significantly higher heart rates and they also showed and reported to have more excitement in watching the race.

In addition to the above, a further study by Wulfert et al (2008) suggests that the bigger the expected win, the greater the arousal from betting. Considering horse racing is enjoyed globally without people wagering on the outcome, people are excited and exhilarated by an exciting race either way; however, placing a stake on the outcome raises excitement levels to a greater extent. The bigger the win, the bigger the buzz.

The problem with online gambling and in this case, gambling smartphone apps, is that online gamblers bet more often and gamble more money than those who don't gamble online (Griffiths & Barnes, 2008). Along with this, some gamblers find online gambling to be substantially more addictive; indeed, Gainsbury et al (2012) support this sentiment, showing that gamblers bet more frequently than offline gamblers, see figure. 5.



Highest gambling frequency	Non-Internet gambler	Internet gambler
4 or more times a week	19.3%	43.1%
2–3 times a week	18.4%	21.3%
Once a week	18.7%	15.0%
2–3 times a month	9.7%	5.3%
Once a month	8.4%	2.8%
Less than once a month	18.0%	3.9%
Not at all in the past 12 months	7.5%	8.6%

**Figure 5** - Gambling frequency between non-internet and internet gamblers (*Gainsbury, et al., 2012, p. 1393*)

If gamblers feel that they are buying entertainment and online gambling is arguably more addictive than offline/traditional gambling, then accessing gambling smartphone apps will have an impact on customers gambling more often and spending more money. Initially the consumer may feel that value is attained for a justified risk/reward, but over time the reward will most certainly be in the gambling company's favour.

## 2.10 Proposed Framework of Customer Value Creative in Gambling Smartphone Applications

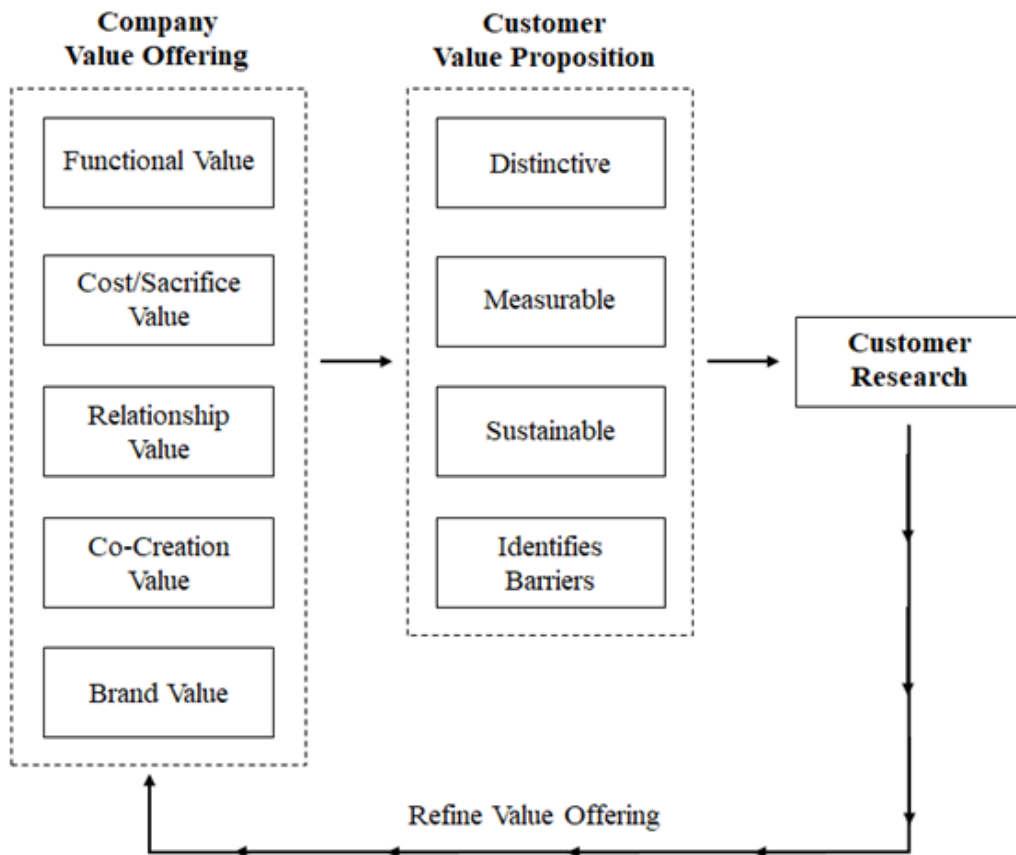


Figure 6 - Framework of Customer Value Creative (Shanker, 2012)

The Framework of Customer Value Creation in figure 2 is a guideline for customer value research and relates to the areas of value that matter to customers. The framework was attained as open source software and has been slightly tweaked to suit the research at hand. The value creation strategies highlight numerous areas to better understand and manage customer value expectations. (Shanker, 2012)

Customers are demanding more from business with increased worldwide competition and online stores with consumers having access to more markets than ever before. Many businesses in certain areas provide similar products and services in an increasingly saturated market; hence, companies are looking to achieve and retain a competitive advantage: the competitive advantage is superior customer value and how it's delivered. (Woodruff, 1997).

Drucker (1973) believes that “to satisfy the customer is the mission and purpose of every business” and according to (Slater, 1997), when superior customer value is delivered by businesses, customer satisfaction is achieved.

By understanding the customer value offering that a company creates, a customer value proposition can be developed. The customer value proposition should resonate with customers. When companies understand their customers, they make positive educated decisions for the future of the business (Anderson, et al., 2006). By carrying out customer research, the customers quantify value in monetary terms. This allows companies to identify barriers and evolve their offering to provide more value and services to customers (Shanker, 2012).

The research for this dissertation is centred around the company value offering and how by using customer research, gambling companies can leverage data to better provide value to consumers. The frameworks company value offerings will be used to validate their importance from the customers perspective and from their experience of using gambling smartphone apps.

## **2.11 Literature Review Conclusion**

The purpose of this literature review is to discuss the different areas which have contributed to the creation of customer value in the use of smartphone gambling applications. It is clear from the research reviewed that there is no one specific area that creates value for both the gambler and the practitioner. As value creation comes in many forms, they are inherently linked together and integrated to provide an enjoyable experience in using gambling services and products. Along with this, it is also clear that gambling is a subject of much debate and due to its many forms, has diverse value creation, depending on the medium used to gamble. Gambling companies have created online personas which are engaging and entertaining users through social media and this strategy has been highly successful and attributed to the acceptability of gambling companies as a form of amusement in society. This field of inquiry is important as it will help identify how consumers perceive value in using smartphone gambling apps and the impact and prevalence of usage among males, 25 – 44. Helping to understand this value is important as it may allow lawmakers to make decisions that would allow them to regulate the industry and put restrictions in place to make gambling less harmful in society.

## 3.0 Chapter 3 - Research Methodology & Methods

### 3.1 Introduction

According to (Kothari, 2004), research is the advancement of existing knowledge of a subject to find the truth by observation, study, experiment and comparison. It's the search for more knowledge by using systematic methods to find a solution to a problem. He also states that Research Methodology is a way to solve the research problem systematically, suggesting that researchers need to understand the underlying methodology as well as the research methods/techniques encompassed therein.

This study engages in primary research, which is mostly quantitative in nature. This primary research is derived from an initial pilot study survey, and a complimentary, more comprehensive survey directed at the target demographics. Secondary research was also carried out with reference to peer-reviewed journal articles and other reputable academic sources, as well as reports relating to gambling, technology, social media advertising, gambling culture and smartphone use.

### 3.2 Research Problem Definition

Figuring out the research problem is the backbone of any explorative project. Once achieved, the attendant issues require to be narrowed down, leading to a range of research questions (Anderson, 1998).

Bryman (2007) points out that some researchers find adequately defining the problem is of critical importance to the ensuing research process. The research question under investigation for this study is: **“What impact do smartphone gambling applications have on the creation of customer value among males, 25 - 44?”**. The purpose of selecting the specific age sample for this research is clarified and discussed under the ‘Sample’ section further in the study.

### 3.3 Proposed Research Methodology

The aim of the research is to show how betting firms have created customer value through their smartphone apps and how their future and competitive advantage will be attributed to value creation for the consumer. To achieve this in a systematic and structured way, the research methodology used in this dissertation was derived from the Research Onion (Saunders, et al., 2012) This image and its variables are used as a guide throughout the research.

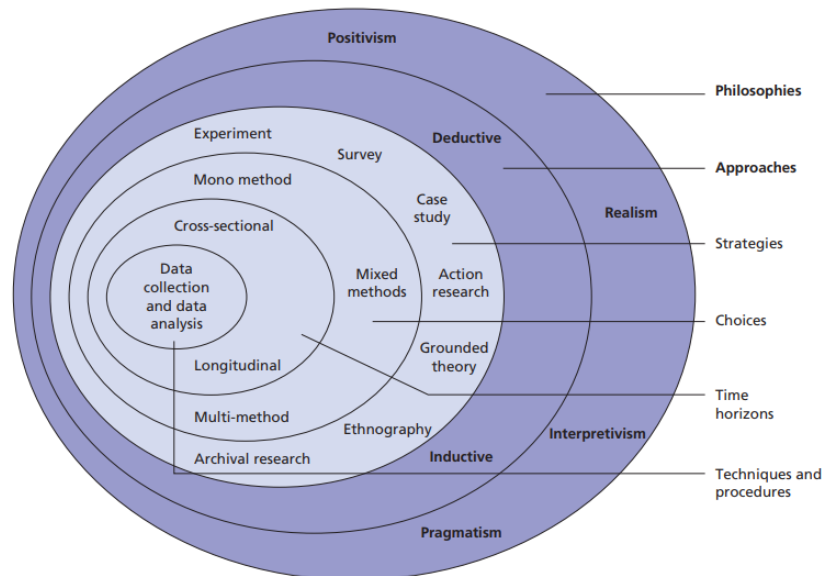


Figure 7 - The Research Onion (Saunders, et al., 2012)

The Research Onion covers the different phases of developing a strategy of research. It goes through the steps involved in developing the research methodology. The image shows that there are several steps in the Research Onion, starting with Philosophies and from there moving down to Approaches, Strategies, Choices, Time Horizons and Techniques and Procedures. The steps all lead into data collection and data analysis in the centre of the onion where the data can be collated and processed for examination.

Using the Research Onions different stages allows the researcher to structure the research methodology into useful stages of development. It is significant in this study as it ensures that the different methods of data collection can be understood.

### 3.4 Research Philosophy

The Research Onion shows that there are 4 main research philosophies:

- Positivism
- Realism
- Interpretivism
- Pragmatism

The research philosophy adopted for this dissertation is **Interpretivism**. Interpretivism involves researchers interpreting areas of the study in question and integrating a human interest into the study. It advocates that the researcher understands the differences between humans in their role as social actors (Saunders, et al., 2012).

Humans are different, we think differently, act differently and talk differently. One person may describe something as valuable, another person may not. Interpretivism shows that humans are human, and they do not all think in the same way, as such how they interpret things can be different. This research philosophy takes into account that humans in their everyday social roles interpret their own meanings towards experiences and feelings towards people. Hence, in the case of gambling companies creating customer value through targeted advertising via social media and smartphones, their messages are likely to be interpreted in a range of different ways by human beings susceptible to suggestion, persuasion and the power of discourse (language and imagery) to compel behaviour. This relates to the underlying basis of interpretivism, as derived from the traditions of Phenomenology and Symbolic Interactionism. Phenomenology, in essence, refers to the way humans make sense of the world around them, Symbolic Interactionism, which is itself a form of Phenomenological understanding, emphasises the power of symbolism (images and language) in our understanding of the world and, therefore, our sense of self-identity with it (Saunders, et al., 2012): be it as a consumer, gambler or, as this study refers to, both.

In order to structure the quantitative research questions in a way that is relevant and applicable to this dissertation, the researcher used gambling apps on a regular basis to experience how gambling smartphone apps offer value to consumers through their services. By entering the social world of the participants this has allowed the researcher to experience gambling

smartphone apps from the customer's point of view and interpret the framework of customer value creation directly experienced by the target audience.

It is said that Interpretivism is most effective on using a qualitative approach to research; however, for this dissertation the researcher felt that an anonymous quantitative approach may garner more insight into user experience and the creation of customer value, as a qualitative approach could lead to participants being reluctant to share their experiences as they feel they could possibly highlight their issues or addictive tendencies. The research will provide what is effectively a qualitative analysis of the quantitative data.

An alternative method that could have been used in this research is **Positivism**. While this research philosophy is said to be more suitable in quantitative research (Saunders, et al., 2012), Interpretivism was chosen over Positivism, Realism and Pragmatism as this philosophy better related to the research question that focuses on humans and how they interpret value using gambling smartphone apps.

**Realism** and **Pragmatism** were not considered as appropriate research philosophies for this study. Realism relates to the idea of independence of reality from our mind and perceptions and Pragmatism relates to a willingness to compromise and that practical beliefs or ideas are a way of understanding the truth (Saunders, et al., 2012). Considering all four philosophies, Interpretivism is most suitable as a guiding tradition/theory for this study.

### **3.5 Research Approach**

There are two basic approaches to research: a quantitative approach and/or a qualitative approach. Quantitative analysis relates to the measuring of data by quantity as opposed to qualitative analysis which essentially measures quality.

Research suggests that quantitative and qualitative research can be described as two coherent cultures that differ in systematic and coherent ways. They are arguably based on different 'values, beliefs and norms' and are 'associated with distinctive research procedures and practices' (Goertz & Mahoney, 2012).

Using the Research Onion in figure 7 (page 37), the two approaches used in the design of this research are either Deductive or Induction in nature.

According to (Saunders, et al., 2012) deduction has its origins of research in the natural sciences but in the 20<sup>th</sup> century and the emergence of social sciences, researchers became wary of deduction as a research approach. They were critical of the deduction approach as it enabled a cause–effect link between particular variables without interpreting how humans understood their social world. The strength of an inductive approach allows researchers to develop a better understanding of the theory from the ground up: to let the data more substantially drive the interpretive outcomes.

An inductive approach was applied in this study as the research involves making generalisations based upon the primary research data derived from surveys. With the inductive approach there is some fear that no useful patterns of data and theory will emerge and, in this case, that no clear data showing how value creation is both noticed and/or appreciated. However, using the framework of customer value creation, the researcher feels that under the headings of functional value, cost/sacrifice value, relationship value, co-creation and brand value, data will clearly show how value is attributed to customer usage and experience of using gambling apps.

The empirical research in this study relies on experience of app usage and the connecting attributes that add value to app usage. The research will derive conclusions that will depend on the users' recorded answers, thus inferring their actions. To prove or disprove the hypothesis, the evidence gathered should show the value creation of gambling smartphone apps and how other aspects of value creation are part of the service offering of companies in this field.

### **3.6 Research Strategy**

The research strategy for this dissertation is based around the Framework of Customer Creation and the Research Onion in figure 7. The research question has guided the strategy and using the Research Onion there are several strategies to consider such as: surveys, experiments, action research, case study's, ethnography, grounded theory and archival research. These strategies are not mutually exclusive; however, the researcher chose to use surveys as their



choice to extract the information and felt this method was necessary to effectively evaluate their hypothesis.

The survey strategy allows the researcher to collect large amounts of quantitative data which can then be analysed to suggest reasoning between certain relationships within the research. The findings can then be used as a representative of the population, providing that there is a good response rate, the data is a good representative sample and the instruments used in the collation are fit for purpose and produce the information required (Saunders, et al., 2012).

Considering the subject at hand, the researcher was determined to conduct the research in an anonymous fashion to get a true outcome of user participation and usage of smartphone gambling apps. Along with that, the author was conscious of problem gambling and how possible biased and untrue statements could be expressed by participants using a different strategy as they may be afraid to discuss or disclose information relating to their gambling habits and frequency.

Anonymous surveys allow participants to show their true feelings and opinions on the questions at hand and gamblers may feel more comfortable in sharing their experiences without putting their name or face to the survey. The ease of access and the anonymous nature of online gambling which would include gambling on smartphone apps can give gamblers the opportunity to escape from real life problems (Griffiths, 2003). However, research carried out by Neighbors et al, (2002) in relation to gambling habits of college students in the USA showed that escape was not commonly reported as a motive in gambling, their motivation for gambling was to win money, for social reasons, for fun, for excitement, or simply to pass time.

(Kothari, 2004) suggests that for a survey to be successful, it should be short and simple with the questions proceeding in a logical sequence moving from standard easy questions to more difficult, probing questions. The researcher took this on-board when designing the survey as part of their research strategy.

### 3.7 Research Choice

The research applied in this dissertation is quantitative in nature; thus, it employs a **mono-method** of research. In contrast to a **mixed-method**, which would have included both quantitative and qualitative research.

As from the model in figure 8, there are numerous approaches to the multiple method approach. By choosing a multi-method approach, combinations of data collection techniques would be required to justify the research. If using a multi-method of research, this would include both quantitative and qualitative research, the researcher could also have used a multi-method of quantitative research such as surveys, case study's and action research or a multi-method of qualitative research such as focus groups and in-depth interviews. Saunders et al, (2012) states that quantitative data should be analysed quantitatively, and qualitative data should be analysed qualitatively. The techniques and procedures should not be mixed.

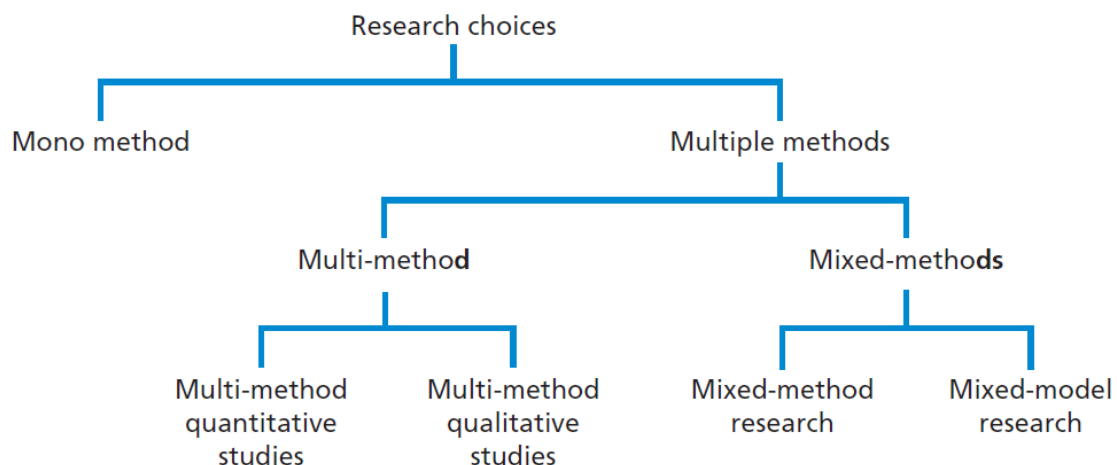


Figure 8 - Research Choices (*Saunders, et al., 2012*)

Research conducted by Bryman (2016) with 232 social science articles showed research outcomes may not be predictable when using both qualitative and quantitative methods. Also, when they are combined, there is the potential and in some cases the likelihood that unanticipated outcomes can be multiplied. He also found that there can be a contradiction between qualitative and quantitative methods. As a result, the researcher chose to conduct a mono-method of research for this dissertation.

The research in this study is **cross-sectional** and relates to the study of the creation of customer value over a two-week period using a survey relating to app usage and behaviour. It is not **longitudinal** in nature as the research was conducted over a short period as opposed to a study completed over a longer period of time measuring change and development (Saunders, et al., 2012).

### **3.8 Secondary Data Collection**

Secondary data collection refers to data that has been collected and analysed by others. Various sources need to be investigated to find suitable data. Secondary data can be easier to obtain than primary data and researchers are confronted with less issues trying to obtain information. The secondary data being used must be reliable, suitable and adequate to the study (Kothari, 2004).

The sources used in constructing the literature review for this dissertation were a mixture of text books, academic journals, web reports, websites and annual reports conducted by reputable companies. Considering the gambling subject at hand it is not easy to access information from specific bookmakers as their information is hard to find and they don't actively report on specific numbers, usage and active users. They report on revenue forecast and projections as they are required.

For app downloads the Google Play store and Apple App store show an estimate of app downloads and not an exact figure however their numbers show a considerable amount of people are accessing gambling smartphone applications.

In relation to smartphone app usage there is not a lot of research into gambling apps and motives and value attribution so the secondary research in relation to this area centres around online gambling, smartphone usage for other applications and some statistical data from reputable online sources to back up the research.

### 3.9 Quantitative Primary Data Research

Quantitative market research measures phenomena such as product preferences, brand penetration, and brand awareness and it uses percentages and numbers to come up with 'facts' relating to a given sample. In contrast, qualitative market research, is used when researchers want to understand the 'why', as in attitudes, motivations and behaviours for more of an in-depth understanding (Barnham, 2015).

The data collection method used in this dissertation was by survey using an online questionnaire involving 35 questions. It was a self-completed online survey and for the first 15 questions, the researcher used closed ended questions to extract definitive data from the participants in several areas. The following 20 questions were using Likert-scale style rankings, relating to the opinions and experiences of the participants on the subject.

According to Witmar, (1999), Internet mediated questionnaires allow greater control over participants who complete the survey as most people access, read and respond using their own computer or laptop, especially through email. In this scenario it was through social media channels which would have been accessed through participants own smartphone or computer. The targeted demographics were then mined from the results.

The Likert-scale was used from questions 15 – 35 as the researcher wanted to see how strongly the participants felt about certain statements and whether they agreed or disagreed using a 5-point ranking scale. The five options were; Strongly Agree, Agree, Neutral, Disagree and Strongly Disagree. To calculate the different levels of importance and relevance relating to the answers provided by participants, the weighted average formula was used. It was calculated as 1 = Strongly Agree, 2 = Agree, 3 = Neutral, 4 = Disagree and 5 = Strongly Disagree. The weighted average was calculated for each option by adding the Likert-scale score items together and dividing by 5 to get the average. (Saunders, et al., 2012)

Rating questions were used to see how participants felt about their experience and attitudes while using gambling smartphone apps. By using numerical scores for each statement answer with the Likert-scale, each participants response was used to indicate the participants favourableness or unfavourableness (Kothari, 2004). These scores when added together and

with the average calculated, represented the participants position on the statements in question and their attitudes towards the value attained from using gambling smartphone apps.

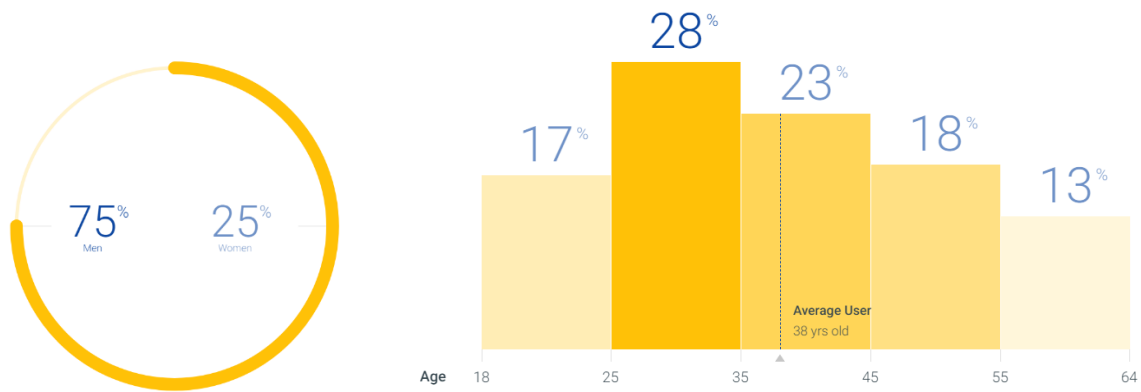
### **3.10 Sample**

When research is undertaken, cost and time considerations must be factored in when selecting respondents for the study. Selected respondents of the study are technically called a 'sample', with the process of selection called 'sampling technique' (Kothari, 2004). For this study the survey was distributed through social media channels. It was important that the target demographics were gathered from the sample and to do so the survey was circulated to all ages with the required demographics mined from the results.

Two sampling techniques that the researcher particularly engaged with were non-probability or judgemental sampling and probability or representative sampling. For this research, probability sampling was selected as the researcher felt that they could achieve the objectives by conducting a survey and statistically estimating the value obtained from the chosen demographics. Probability sampling is also known as random sampling and the participants of this study were unaware of what the survey entailed and as such, the probability of the data that is produced from the chosen demographics can be generalised as an overview of the population of the target audience (Kothari, 2004).

Non-Probability sampling was not selected as in this study the results can be generalised and the data does have implications to the entire population, but specifically to the chosen demographics. Generalisations can still be made when selecting non-probability samples but not using statistics (Saunders, et al., 2012).

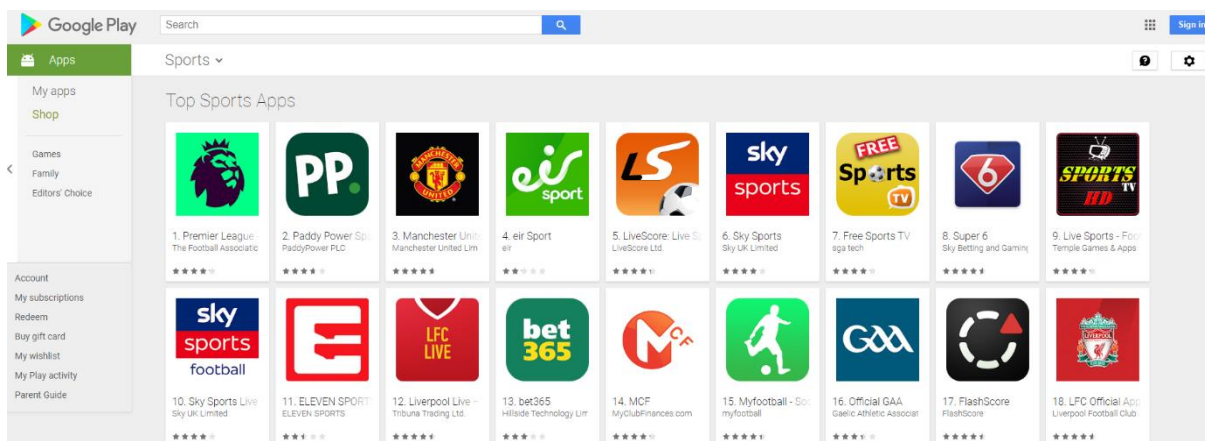
The sample selected for this study was carefully chosen from research on sports app usage carried out by Google (2018) as shown in figure 9. This research showed that the demographics of usage of sports apps was 75% male and the age most active in their use was 25 – 44.



**Figure 9** - Understanding mobile app users – Sports app users (*Google, 2018*)

Considering sports gambling apps are categorised under sports apps in the Google Play store and Apple App Store, the largest app stores in the world, the researcher chose to carry on the research on that specific demographic. Also, the researcher is male, and their own age was within that age group selected which made it more interesting and applicable to their own environment.

Further research within sports apps on the Google Play store show that among football teams, football association apps like the Premier League and the GAA, sports TV channel apps and sports score update apps; Paddy Power, Irelands largest bookmaker is at no. 2 in the top sports apps, with Super 6 in 8<sup>th</sup> place where consumers can predict scores and make a bet and Bet365 comes in at no. 13, see figure 10. Three gambling apps are present in the top 18 of sports apps which shows how popular these apps have become (*Google Play Store, 2018*).



**Figure 10** - Screenshot of top sports apps on Google Play store (*Google Play Store, 2018*).

### **3.11 Analysing Quantitative Data**

Quantitative data analysis techniques help researchers to explore, describe, examine and present trends and relationships within data (Saunders, et al., 2012) that is directly sources and inductive in nature. All analysed data must be organised correctly, otherwise the researcher may have issues in analysing the results. (Kothari, 2004). For questions 1 – 14, descriptive scales were used to gain insight into the target demographics and also, some insight relating to indirect value creation using social media which has strong links with the apps and value creation. For questions 15 – 35, ranking data questions were used, using the Likert-scale. Using this ranking data, it was possible to provide statistics relating to the attitudes, opinions and feelings in relation to the creation of customer value. Bar charts were used to better display the data and show the differences in the results.

### **3.12 Ethical Issues**

In this study, the researcher ensured that all data gathered was anonymous and the participants who completed the quantitative online surveys did so voluntarily. The research obtained through online surveys was only used for this study and the target demographics were extracted from the research for this dissertation. As such, no ethical issues were present, and all participants freely gave their information and usage experience for the benefit of the study.

### **3.13 Limitations**

Considering the online environment of the research and speed of the evolution of smartphones and smartphone apps, finding relevant academic literature was a challenge and hindered an in-depth look into the phenomena. The research was also limited to a certain number of people who used gambling apps. While 455 were surveyed, only 96 people fell into the target demographics. Another limitation to the research may be that some personal viewpoints may not be expressed in case of possibly showing any issues or problems that the participants may have in relation to gambling addiction and app usage. This research may not be an exact representation of what customer value is created by the usage of gambling smartphone applications on a wider scale; however, the research aims to be conclusive as possible and show the links and related behaviour which will back up the research statement.

## **4.0 Chapter 4 - Analysis of Findings**

### **4.1 Pilot Study**

Gambling smartphone applications and gambling in general is not something for everyone. There are a lot people involved in the gambling industry directly or indirectly and many who may have the occasional flutter on a horse, greyhound and/or sporting event. The environment has now changed in the past number of years and more and more people are using gambling smartphone apps to make a bet. To have a better idea of the numbers betting and using smartphone applications the researcher conducted a pilot study to find out how prevalent was the use of gambling smartphone app usage and what perceived value did they get from using the apps.

The pilot survey was sent out by the messaging smartphone app; WhatsApp, to 30 participants in the target demographic of between 25 and 44 years of age.

It was completed by 24 of the 30 participants and of the 24 people, 13 were male and 11 were female. Females were also initially selected alongside men for this study in order to find out if the data gathered would correspond with the research carried out by Google (2018), which showed that a quarter of women use a sports smartphone app. Eight people of the twenty-four, exactly one third, had a smartphone app on their smartphones and of the eight people, seven were men and one was a woman. This data somewhat backed up the percentage figures shown in Figure 9 (page 46), albeit coming in at 12.5% for women but using a small sample. The pilot study justified the target demographics selected.

The pilot study involved 20 questions ranging from demographics information to app usage, app brands, social media relating to the apps and value derived from using the apps.

All this information was then used to formulate the final survey for distribution to the public. The number of questions increased from 20 to 35 and a better understanding of app usage was broken down under the five objectives to ensure to answer the research question.



## 4.2 Survey Findings & Theme Analysis

To gather valuable research, the survey needed to be unbiased. To find out the impact of gambling smartphone applications and the creation of customer value, quantitative research was carried out by way of an online survey. Participants of the study were taken from the public and they were asked about their experiences and usage of smartphone gambling apps and the exposure to marketing practices that are connected to their business strategies.

The survey was live from the 21<sup>st</sup> of July 2018 until the 3<sup>rd</sup> of August 2018 and during those 14 days, 455 people responded to the survey and completed it. The survey was distributed through several social media channels including, Facebook, Twitter and LinkedIn. It was also shared on the WhatsApp messaging service amongst groups and encouraged to be shared among those who had completed it.

The participants would begin the survey by stating their gender followed by their age, this allowed the researcher to then extract the targeted data for the specific demographics related to the study. The researcher chose not to inform the public of the exact contents of the survey, they simply stated it was in relation to smartphone app usage and experience. They did not mention gambling as this may have deterred people from completing the survey. On the third question, participants were asked if they owned a smartphone; if they did not possess one they were automatically disqualified from the survey. On the following question, if the participants responded to owning a smartphone then they were asked whether they had a gambling smartphone app on their smartphone. Again, if they did not have a gambling smartphone app they were automatically disqualified from the survey.

From the fifth question onwards, the participants were all people who had a smartphone with a gambling smartphone app on their smartphone and this is where the data relating to the chosen demographics can be found. However, there were some other interesting insights into the survey data.

### 4.3 Initial Questions of Eligibility

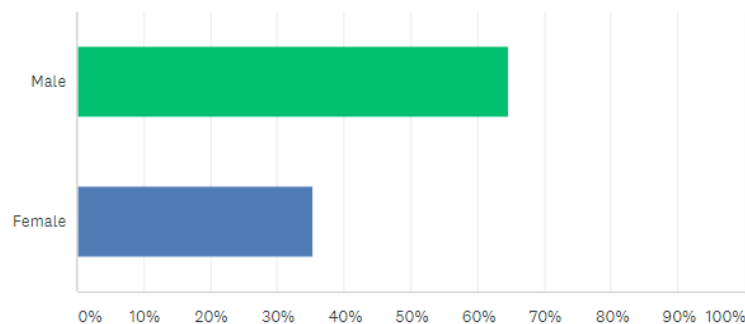
#### Question 1 – Are you Male or Female?

In question one the researcher asked a simple gender question. This allowed them to filter out the gender of the target demographic when extracting the data. While the target demographics are males 25 – 44, the information outside of that also makes interesting reading. Of the 455 people who completed the survey, 294 were male and 161 were female. It's not known why there were a lot more men completing the survey than women, however, considering the researcher was male, the researchers influence on people completing the survey may have made more of a connection within their male dominated circles which could have attributed to the higher rate of male completions.

Q1

Are you male or female?

Answered: 455 Skipped: 0



ANSWER CHOICES	RESPONSES
Male	64.62% 294
Female	35.38% 161
TOTAL	455

Figure 11 - Survey Question 1 – Are you Male or Female?

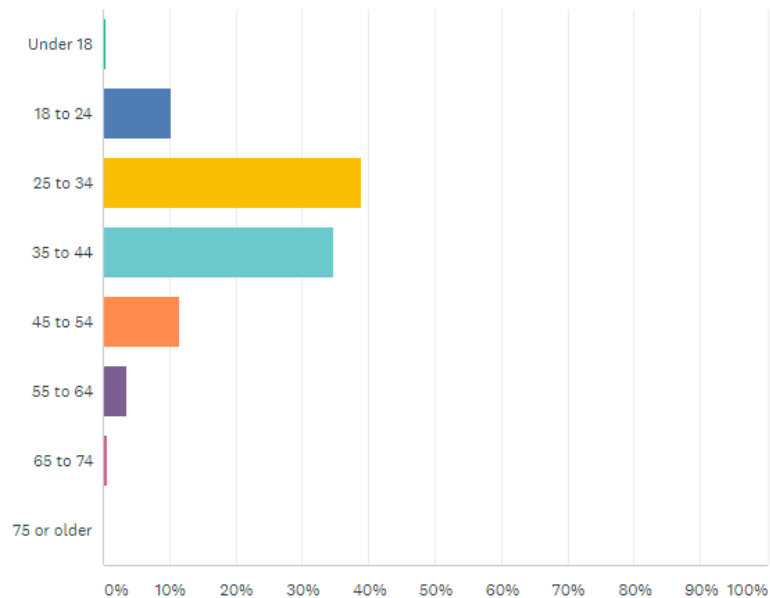
## Question 2 – What is your age?

In question two the researcher asked what age the participants were who completed the survey and the answers ranged from under 18 up to between 65 – 74. The target demographics were prominent here with 73% of those who completed the survey between the ages of 25 – 44. This boded well for the researcher as the target demographics were active in taking part. Again there is no sure fire way as to why so many participants fell under that age profile considering that the survey was exposed to the general public but again considering the researcher is in that age bracket themselves, their social groups and the age profile of their followers may be similar and that no doubt attributed to the higher rate of completions from 25 – 44 year olds.

Q2

What is your age?

Answered: 455 Skipped: 0



ANSWER CHOICES	RESPONSES
Under 18	0.44% 2
18 to 24	10.33% 47
25 to 34	38.90% 177
35 to 44	34.73% 158
45 to 54	11.43% 52
55 to 64	3.52% 16
65 to 74	0.66% 3
75 or older	0.00% 0
<b>TOTAL</b>	<b>455</b>

Figure 12 - Survey Question 2 – What is your age?

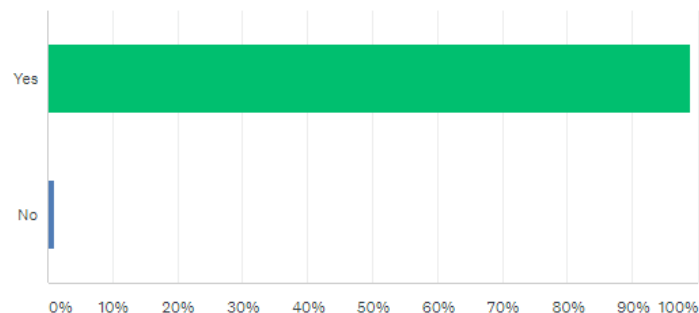
### Question 3 – Do you own a smartphone?

Question 3 was straight forward; do you own a smartphone? Of the 455 who took part only 5 did not have a smartphone. This relates back to the literature review where it stated that smartphone users in Ireland is increasing year on year. From the statistics from question 3, it shows that 99% of those who completed the survey have a smartphone and have access to smartphone apps. This shows why companies are migrating from online stores to store apps and responsive websites. They have banking, retail stores, bookmakers in their pockets all day everyday if they so wish. The marketing involved in getting customers to download the apps is the first touchpoint, following on from that, the value attained from using the app is then decided by the consumers. If the creation of value through the apps can be experienced and the customer enjoys the ease of use and displayed features of the products and services then they are only a few touches away from making a purchase, making a bet or using their services 24 hours a day, seven days a week.

Q3

Do you own a Smartphone?

Answered: 455 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	98.90%	450
No	1.10%	5
<b>TOTAL</b>		<b>455</b>

Figure 13 - Survey Question 3 – Do you own a smartphone?

#### Question 4 - Do you have a sports gambling smartphone app on your smartphone?

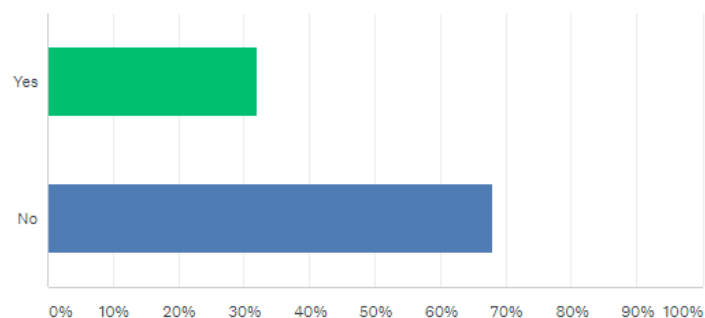
Question 4 of the survey was the crunch question, this where the research lost most of the participants. Of the 455 participants, 304 did not have a gambling smartphone app. However, 143 did have a gambling smartphone app so they all progressed to question 5. This equates to 27% of people who responded to the survey which shows the prevalence in society. Nearly three in every 10 people have a gambling smartphone app on their smartphone.

To further break it down by gender, 21 of the 143 people with a gambling app were women, with 122 men. Considering 161 women took part in the survey this shows that 13% of women have a smartphone app on their smartphones. This also shows that of the 295 men who took the survey, 122 have a gambling smartphones app and that equates to 41% of men. This figure looks dangerously high in relation to future gambling problems and addiction as these issues would be very hard to be seen and noticed by friends and family. That being said, the value that has been created by bookmakers in the usage of their apps have allowed a larger audience to get involved with gambling and further on in the research you can see how the increase of gambling through smartphone apps is on the rise.

Q4

Do you have a sports gambling smartphone app on your smartphone i.e Paddy Power, Bet365, Ladbrokes, Boyle Sports, Coral, Bet Fair etc?

Answered: 447 Skipped: 8



ANSWER CHOICES	RESPONSES	
Yes	31.99%	143
No	68.01%	304
TOTAL		447

Figure 14 - Survey Question 4 - Do you have a sports gambling smartphone app on your smartphone?

## 4.4 Gambling App Usage Questions and Related Influences

### Question 5 - How many bookmakers do you have an online account with?

From question 5 onwards the target demographics were the main area of interest and the survey was filtered into the male gender, the age range of between 25 – 44 years old and those who have a gambling smartphone app. In this question the researcher was trying to find out how many people were content and found value in the gambling smartphone app they use. Could they have more than one app as they find value in a different company's services?

Of the 122 males in the survey who had a gambling app, 96 of them were in the 25 – 44 years old age bracket. Unfortunately, some participants skipped some questions in the survey, but the majority answered all the questions. As you can see in figure 10 below, 59 of the 94 people who answered the question have one gambling smartphone app. That equates to 63% of users. 23% of users have two gambling apps with 6.5% having 3 apps, 1% having 4 apps and 6.5% of participants having 5 or more.

This shows that generally people are happy with the gambling app they use with 63% of users having one app that services their needs and offers value. The reasons as to why users had more than one app were not explored however it be presumed that they felt that other company apps could be more suits to their need in certain areas. More exploratory work could be undertaken there to understand the reasons.

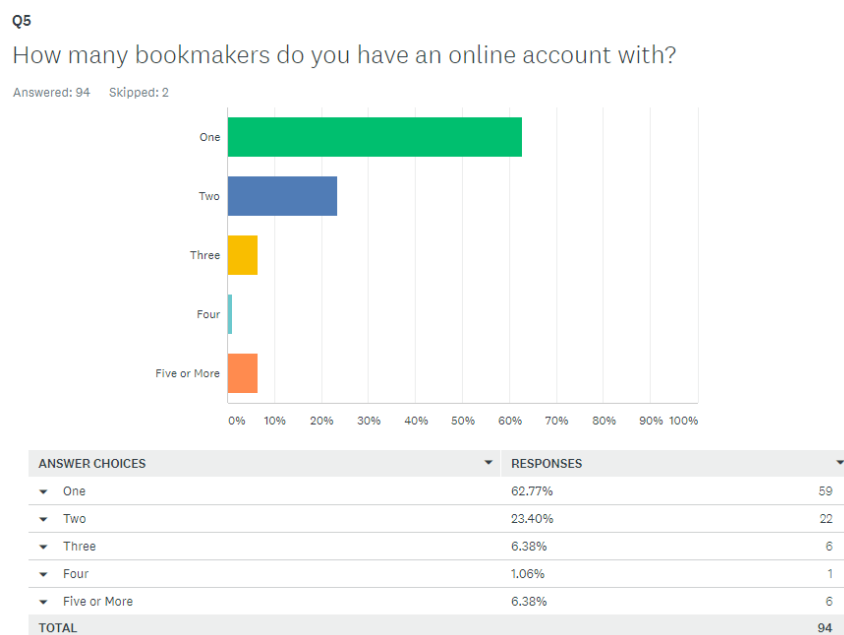


Figure 15 - Survey Question 5 - How many bookmakers do you have an online account with?

### **Question 6: What made you choose the bookmaker/s app to use for your bets?**

In question 6 the researcher was looking to find out the reasons as to why users were using specific apps to make a bet. Participants were given 9 options to select and were asked to select as many as they wanted that related to why they chose a specific bookmakers app.

The options included:

- Ease of use to make a bet
- The bookmaker is likable
- Speed of the app
- I can access the bookmaker shops locally if required
- They offer the best odds
- I enjoy their social media content
- I'm loyal to the bookmaker
- Good customer service
- They have the best offers

Interestingly this did not show much loyalty to bookmakers. Only 6% of participants selected that option, however stating loyalty may be harder than displaying it, as question 5 showed that 63% of users only have one gambling smartphone app. Good customer service came in bottom with only 3% which may indicate the value and quality of the apps. This low figure could be due to the app functioning as required and offering services of value. If the app works fine and the consumer is happy with it then he/she has no reason to deal with the company or any of their staff in relation to customer service. Good customer service could be more prominently selected if the apps were of poor quality.

The big winner in this question was functional value with 60% of participants selecting the option of 'Ease of use to make a bet'. This was followed by 'I can access the bookmakers' shops locally if required' with 26% of participants selecting that option. This shows that a quarter of consumers still want access to physical betting shops as well as on-the-go on their smartphones.

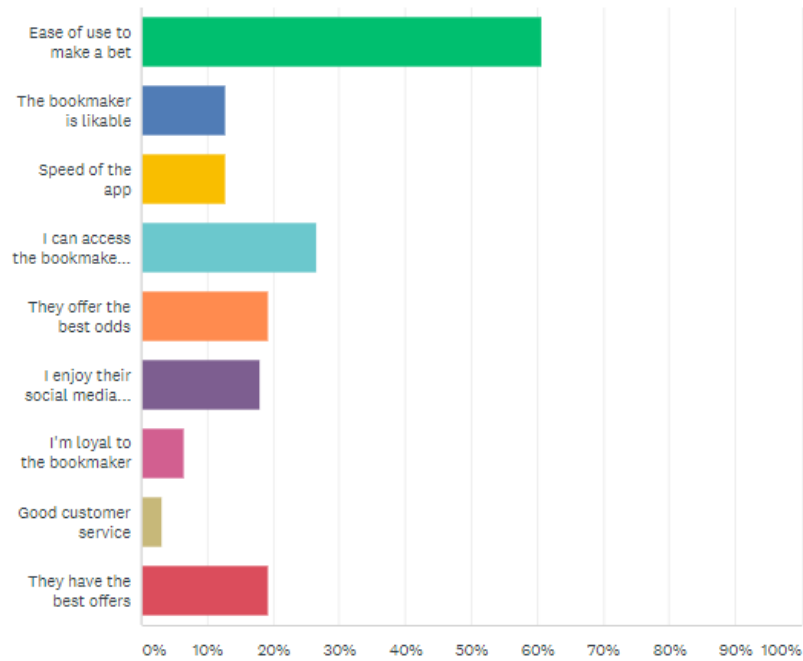
The option of 'I enjoy their social media content' was selected by 18% of participants which shows how users enjoy being entertained by bookmakers online. This also shows that the

bookmakers value is not only through their app and services but also through how they interact with their customers online. This is touched on again in question 8 and 9.

Q6

What made you choose the bookmaker/s app to use for your bets? (Select all that apply)

Answered: 94 Skipped: 2



ANSWER CHOICES	RESPONSES
▼ Ease of use to make a bet	60.64% 57
▼ The bookmaker is likable	12.77% 12
▼ Speed of the app	12.77% 12
▼ I can access the bookmaker shops locally if required	26.60% 25
▼ They offer the best odds	19.15% 18
▼ I enjoy their social media content	18.09% 17
▼ I'm loyal to the bookmaker	6.38% 6
▼ Good customer service	3.19% 3
▼ They have the best offers	19.15% 18
<b>Total Respondents: 94</b>	

Figure 16 - Survey Question 6 - What made you choose the bookmaker/s app to use for your bets?



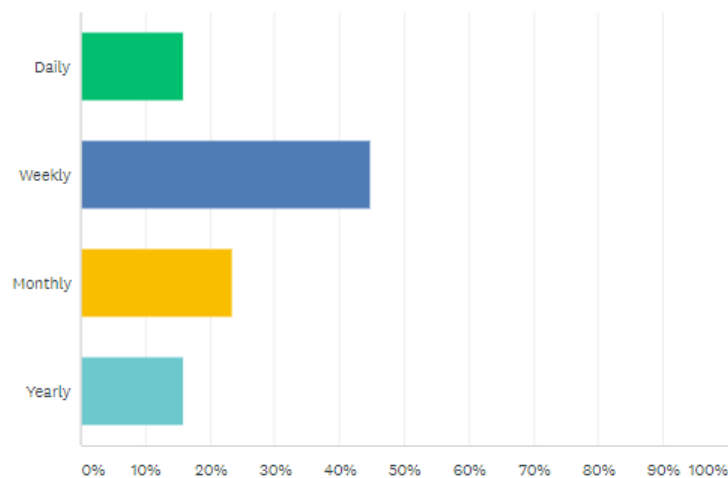
### Question 7 - How often do you use the app/s?

Question 7 was looking to find out how often users use gambling apps and surprisingly enough nearly 16% of users do so daily. Nearly 45% of participants use the apps on a weekly basis, with 23% monthly. These numbers are considerable high in regard to usage figures and shows the addictive nature of their use. The apps have gotten better and better, as they've evolved, users can click in and out more easily, some may say too easily.

Q7

How often do you use the app/s?

Answered: 94 Skipped: 2



ANSWER CHOICES	RESPONSES
▼ Daily	15.96% 15
▼ Weekly	44.68% 42
▼ Monthly	23.40% 22
▼ Yearly	15.96% 15
<b>TOTAL</b>	<b>94</b>

Figure 17 - Survey Question 7 – How often do you use the app's?

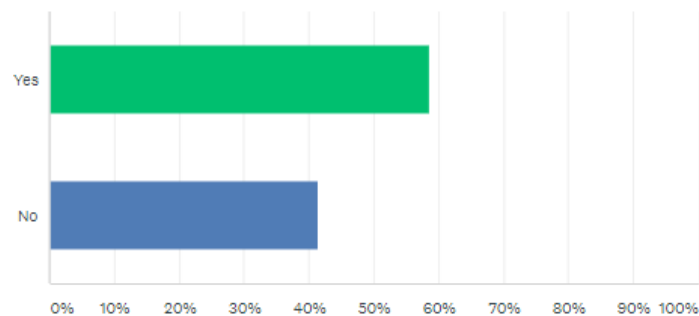
### Question 8 - Do you follow the bookmaker/s on your social media account/s?

Question 8 asked users if they followed the bookmaker on social media as well as using the smartphone app and nearly 60% of participants on the survey stating that they do follow their content on social media. While users may not feel they are being directly marketing to through social media, there's no doubt that this is part of the strategy of bookmakers. The content being created on social media by gambling firms may not always be in relation to the services they offer. According to Molden (2014), exposure to socially relevant content can enable people to have a host of goals, actions, judgements and impressions, which can be outside of people's awareness or intention. Also, according to Laran et al (2010), nearly all marketing content is persuasive, consumers may think that certain content marketing isn't persuasive compared to others but ultimately all marketing content are tactics in persuasion. In this scenario it is most certainly the case that users are not aware of the marketing strategies of bookmakers, but all actions and posts are planned to engage with followers, grab their attention and get them to act.

Q8

Do you follow the bookmaker/s on your social media account/s?

Answered: 94 Skipped: 2



ANSWER CHOICES	RESPONSES
Yes	58.51% 55
No	41.49% 39
TOTAL	94

Figure 18 - Survey Question 8 - Do you follow the bookmaker/s on your social media account/s?

### Question 9 - Why do you follow them on social media? (Select all that apply)

Question 9 was only viewable by those who stated that they followed their bookmaker on social media, so the question was asked, why they followed them?

The options were:

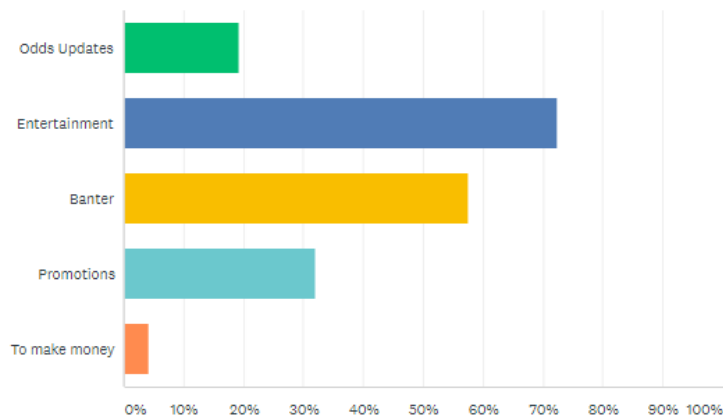
- Odd Updates
- Entertainment
- Banter
- Promotions
- To Make Money

Surprisingly Entertainment and Banter were the main reasons, follows by Promotions and Odds Updates. Only two people selected 'To Make Money' which is strange considering the services the company offer is gambling. This is where gambling firms have added value to their products, by entertaining their customers they are building their brand equity so that when it comes to consumers looking to make a bet, they'll be the first company they think of.

Q9

Why do you follow them on social media? (Select all that apply)

Answered: 47 Skipped: 49



ANSWER CHOICES	RESPONSES
▼ Odds Updates	19.15% 9
▼ Entertainment	72.34% 34
▼ Banter	57.45% 27
▼ Promotions	31.91% 15
▼ To make money	4.26% 2
Total Respondents: 47	

Figure 19 - Survey Question 9 - Why do you follow them on social media?

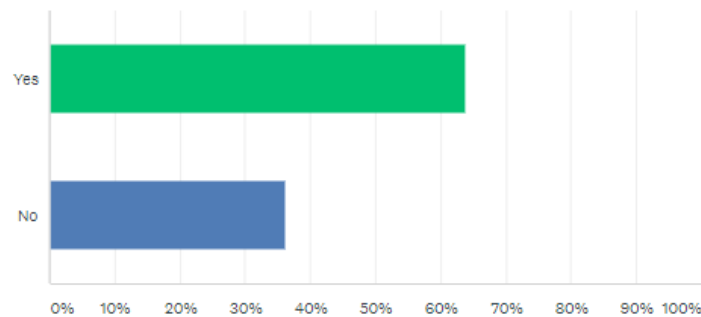
**Question 10 - Do you feel that bookmakers should engage and entertain their followers on social media as well as offer the best odds on events?**

Question 10 was a follow up the previous two questions and asked, ‘do you feel that bookmakers should engage and entertain their followers on social media as well as offer the best odds on events?’. Nearly 64% of those asked said yes. This now shows the expectations of consumers. They not only want to use smartphone apps to gamble but they also expect these companies to engage and entertain them on social media channels.

Q10

Do you feel that bookmakers should engage and entertain their followers on social media as well as offer the best odds on events?

Answered: 80 Skipped: 16



ANSWER CHOICES	RESPONSES	
Yes	63.75%	51
No	36.25%	29
<b>TOTAL</b>		<b>80</b>

**Figure 20 - Survey Question 10 - Do you feel that bookmakers should engage and entertain their followers on social media as well as offer the best odds on events?**

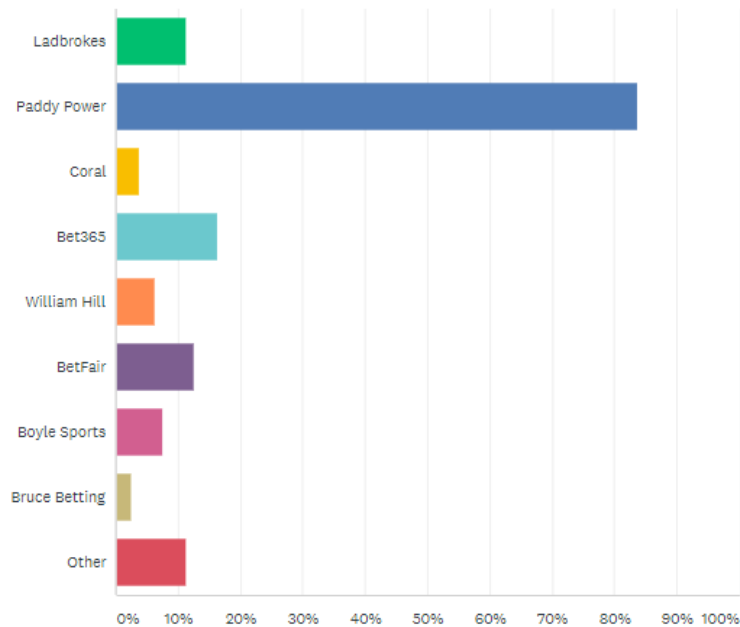
### Question 11 - Who do you have an online account with?

Question 11 sought to find out who consumers had betting accounts with and the result of this was considerably one sided. Nearly 84% of participants surveyed had a Paddy Power smartphone app. Paddy Power is the largest bookmaker in Ireland with over 1.5 million followers on Facebook and 641k followers on Twitter. Their online strategy has no doubt had a huge impact in relation to their app downloads and app usage and their social media channels are a huge part of the company’s marketing strategy, especially in Ireland considering the market share it has.

Q11

Who do you have an online account with? (Select all that apply)

Answered: 80 Skipped: 16



ANSWER CHOICES	RESPONSES
▼ Ladbrokes	11.25% 9
▼ Paddy Power	83.75% 67
▼ Coral	3.75% 3
▼ Bet365	16.25% 13
▼ William Hill	6.25% 5
▼ BetFair	12.50% 10
▼ Boyle Sports	7.50% 6
▼ Bruce Betting	2.50% 2
▼ Other	11.25% 9
Total Respondents: 80	

Figure 21 - Survey Question 11 - Who do you have an online account with?

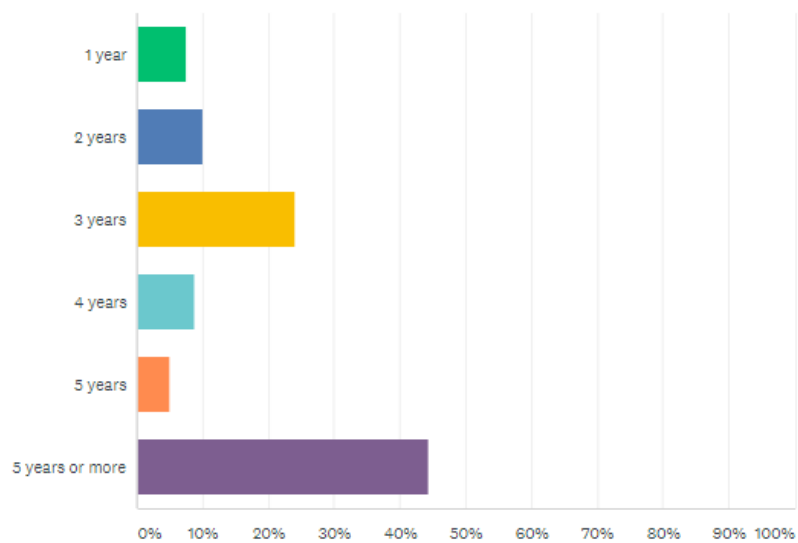
### Question 12 – How long have you been using gambling smartphone apps?

Question 12 was looking to find out how long participants were using smartphone gambling apps. The answers to this question were fascinating as the majority of participants, over 44% have been using gambling smartphone apps for over 5 years. Considering the apps were only available on the app stores from August 2017, companies used other means for users to access their services. More than likely through their website and social media channels.

Q12

How long have you been using gambling smartphone apps?

Answered: 79 Skipped: 17



ANSWER CHOICES	RESPONSES
▼ 1 year	7.59% 6
▼ 2 years	10.13% 8
▼ 3 years	24.05% 19
▼ 4 years	8.86% 7
▼ 5 years	5.06% 4
▼ 5 years or more	44.30% 35
<b>TOTAL</b>	<b>79</b>

Figure 22 - Survey Question 12 – How long have you been using gambling smartphone apps?

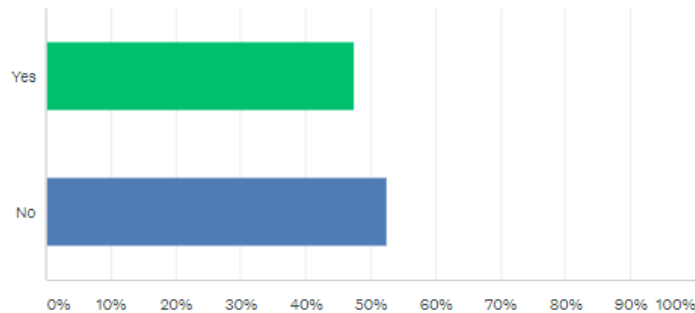
**Question 13 – Did you have an online account prior to downloading the smartphone app/s?**

Question 13 was to ascertain whether participants had an online account with the bookmaker prior to downloading the smartphone app. Nearly half of the participants said yes, with 52% saying no; they didn't have an online account prior to downloading the app. The researcher here was trying to see how many new gamblers were accessing smartphone gambling apps without previously gambling online. Due to ease of access, this shows how gambling smartphone apps have allowed those who may not have been prominent gamblers before, now have access to gambling 24/7 on their smartphones.

Q13

Did you have a online account prior to downloading the smartphone app/s?

Answered: 80 Skipped: 16



ANSWER CHOICES	RESPONSES	
Yes	47.50%	38
No	52.50%	42
<b>TOTAL</b>		<b>80</b>

**Figure 23 - Survey Question 12 – Did you have an online account prior to downloading the smartphone app/s?**

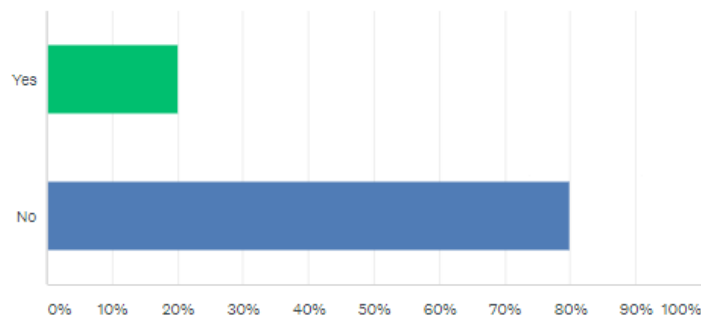
**Question 14 - Do you think you have won more money than what you have bet since using the app/s**

Question 14 was asked just to find out if people felt they were making more money than they had bet whilst using the app and 80% said no. This shows that people know that they will more often than not, lose money using the services provided through the app, however, they enjoy it and it obviously is not just about the money. It can be about the enjoyment of gambling, the risk and reward and emotions involved in experiencing events with a wager on the line.

Q14

Do you think you have won more money than what you have bet since using the app/s

Answered: 80 Skipped: 16



ANSWER CHOICES	RESPONSES	
Yes	20.00%	16
No	80.00%	64
<b>TOTAL</b>		<b>80</b>

**Figure 24 - Survey Question 14 - Do you think you have won more money than what you have bet since using the app/s?**



## 4.5 Value Creation Questions

Using the Likert-scale to measure attitudes and opinions, participants were asked to rate the statements in the survey from questions 15 to 35 under the five options; Strongly Agree, Agree, Neutral, Disagree and Strongly Disagree.

Question 15 represented the start of understanding the creation of value of using the gambling smartphone apps under the framework of value creation. Several statements were created under the framework's headings to better evaluate the consumers experience of using gambling smartphone applications. To calculate the different levels of importance and relevance relating to the answers provided by participants, the weighted average formula was used. It is calculated as 1 = Strongly Agree, 2 = Agree, 3 = Neutral, 4 = Disagree and 5 = Strongly Disagree.

### 4.5.1 Functional Value

#### Question 15 – My betting app is of good quality and is fit for purpose.

Question 15 was a statement on whether participants found that their gambling smartphone app was of good quality and fit for purpose. Nearly 90% of participants either agreed or strongly agreed with the statement which shows that consumers are happy how their choice of app functions and delivers its service as an app. The weighted average for this statement was 1.93 which is significant in relation to value derived from the app usage.

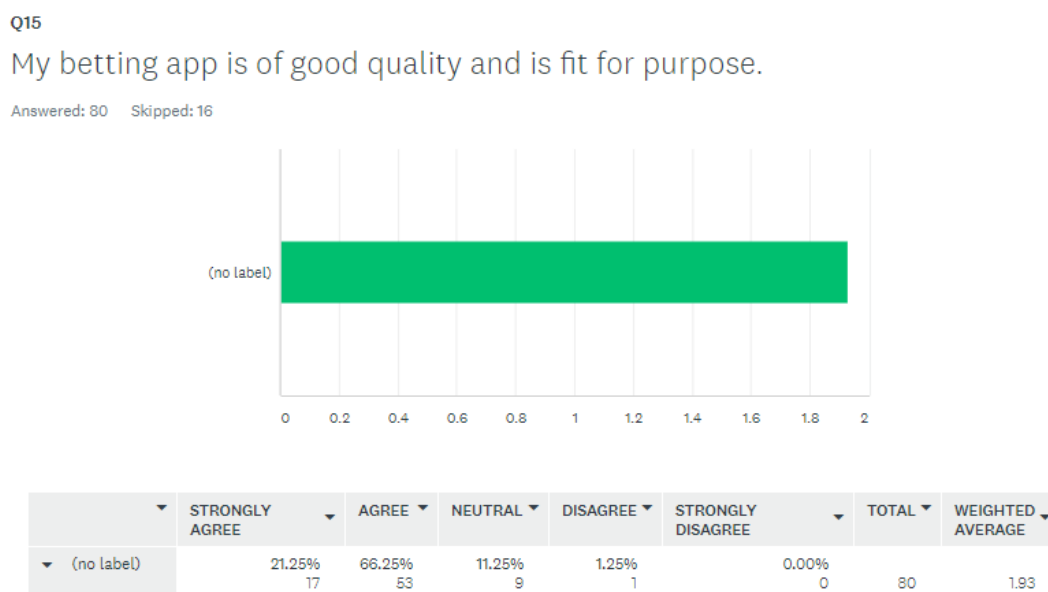


Figure 25 - Survey Question 15 - My betting app is of good quality and is fit for purpose.

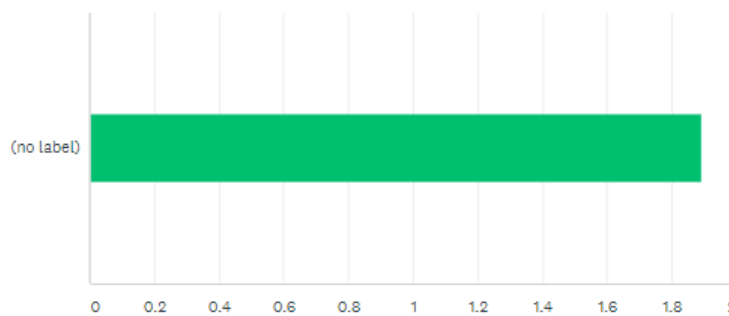
**Question 16 - The app is reliable when making bets and I rarely have any trouble with it.**

This statement was related to the reliability of the gambling smartphone app and whether people had issues using it. Again, this statement had a very positive response. 86% of participants either strongly agreed or agreed with the statement with only 10 neutral on the statement and one person disagreed. The weighted average was strong with a 1.89 figure, so participants felt their app was reliable and rarely gave them any trouble when using it.

Q16

The app is reliable when making bets and I rarely have any trouble with it.

Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	26.25% 21	60.00% 48	12.50% 10	1.25% 1	0.00% 0	80	1.89

**Figure 26 - Survey Question 16 - The app is reliable when making bets and I rarely have any trouble with it.**

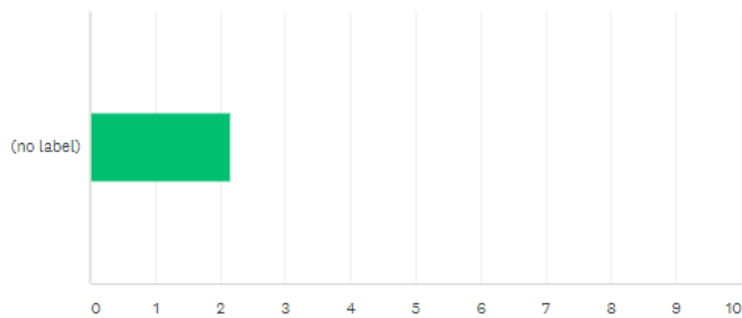
**Question 17 - I feel my personal details and payment details are safe and secure on the app.**

The statement for question 17 was related to whether people felt their personal and payment details were secure when using the app. 75% of participants agreed or strongly agreed with this statement, with 25% neutral on the matter, possibly unsure of whether they safe or not. The weighted average was 2.15 which is still very good and shows the majority of consumers feel their details are safe using gambling smartphone apps.

Q17

I feel my personal details and payment details are safe and secure on the app.

Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	10.00% 8	65.00% 52	25.00% 20	0.00% 0	0.00% 0	80	2.15

**Figure 27** - Survey Question 17 - I feel my personal details and payment details are safe and secure on the app.

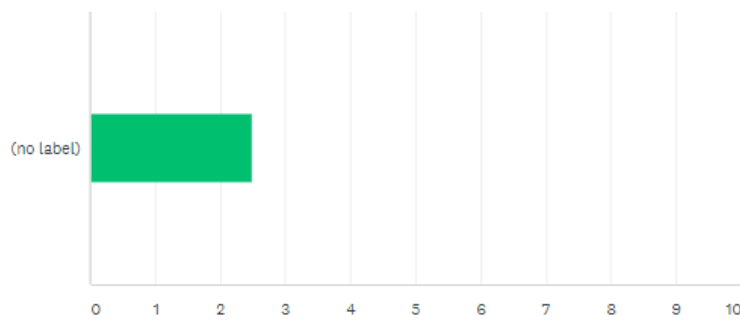
**Question 18 – The app performance is as expected and sometimes even exceeds my expectations.**

This statement related to the performance of the app and whether it exceeds expectations. Generally, participants agreed, with 56% clicking ‘Agree’ but 39% were neutral on it and 5% disagreed with the statement. The weighted average for this statement was 2.49 so it looks like while the app functions very well and works as required, it may not exceed expectations. This may show that the value from gambling apps directly may be similar to their competitors. However, the value outside of that may be the driving force of differentiation which may include their social media channels and marketing campaigns.

Q18

The app performance is as expected and sometimes even exceeds my expectations.

Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	0.00% 0	56.25% 45	38.75% 31	5.00% 4	0.00% 0	80	2.49

**Figure 28 - Survey Question 18 - The app performance is as expected and sometimes even exceeds my expectations.**

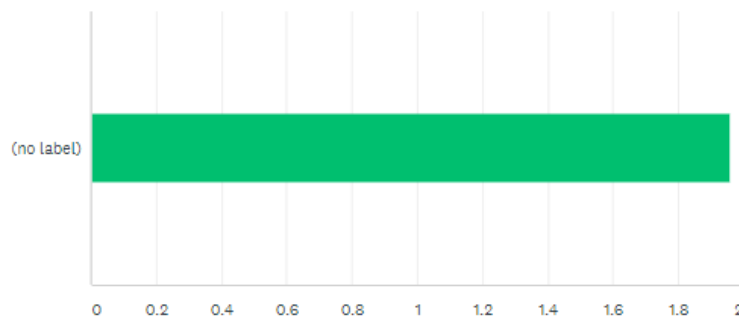
**Question 19 - The app is very quick and there are odds updates in seconds.**

This statement related again to functional value in using the app and the speed in using the services. Again, this was overwhelmingly agreed with nearly 84% either strongly agreeing or agreeing with the statement. 12% were neutral on it, with nearly 4% disagreeing. Depending on the app being used experience may differ. Considering the high number of users using the Paddy Power app, it is safe to presume that their product is looking like it is huge functional value to its users. This adds to the user experience and allows people to dip in and out of the app easily when required. It had a weighted average of 1.96.

Q19

The app is very quick and there are odds updates in seconds.

Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	23.75% 19	60.00% 48	12.50% 10	3.75% 3	0.00% 0	80	1.96

**Figure 29 - Survey Question 19 - The app is very quick and there are odds updates in seconds.**

## 4.5.2 Cost/Sacrifice Value

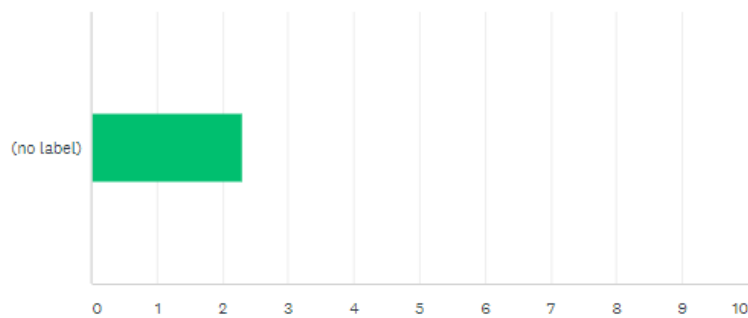
### Question 20 - The odds are competitive and offer value for the risk in most circumstances.

This statement related to the cost/sacrifice value in gambling through the smartphone app and whether consumers were getting value for money. The weighted average was 2.31 with 70% of participants agreeing or strongly agreeing with the statement, 26% neutral and nearly 4% disagreeing or strongly disagreeing.

Q20

The odds are competitive and offer value for the risk in most circumstances.

Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	5.00% 4	65.00% 52	26.25% 21	1.25% 1	2.50% 2	80	2.31

Figure 30 - Survey Question 20 - The odds are competitive and offer value for the risk in most circumstances.

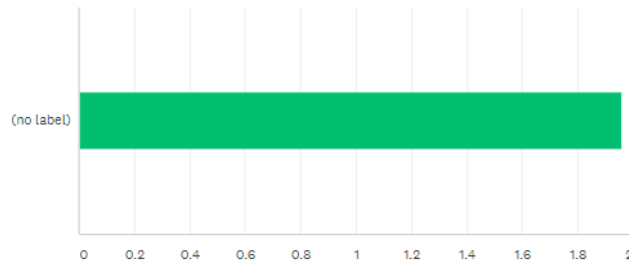
**Question 21 - The app doesn't take up too much of my time to use its services.**

This statement was looking at the time cost/sacrifice related to using the app. It was largely positive with nearly 89% agreeing or strongly agreeing, with a weighted average of 1.96.

Q21

The app doesn't take up too much of my time to use its services.

Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	16.25% 13	72.50% 58	10.00% 8	1.25% 1	0.00% 0	80	1.96

**Figure 31 - Survey Question 21 - The app doesn't take up too much of my time to use its services.**

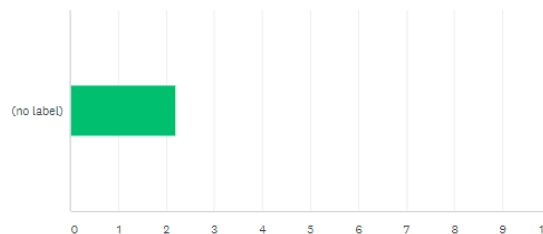
**Question 22 – The effort to find information and bet details on sporting events are easy to access on the app.**

Question 22 related to the effort involved in extracting information from the app and its ease of access for its users. Nearly 78% of participants agreed or strongly agreed with the statement, with only 16% neutral and 6% disagreeing. The weighted average was positive at 2.19.

Q22

The effort to find information and bet details on sporting events are easy to access on the app.

Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	10.00% 8	67.50% 54	16.25% 13	6.25% 5	0.00% 0	80	2.19

**Figure 32 - Survey Question 22 – The effort to find information and bet details on sporting events are easy to access on the app.**

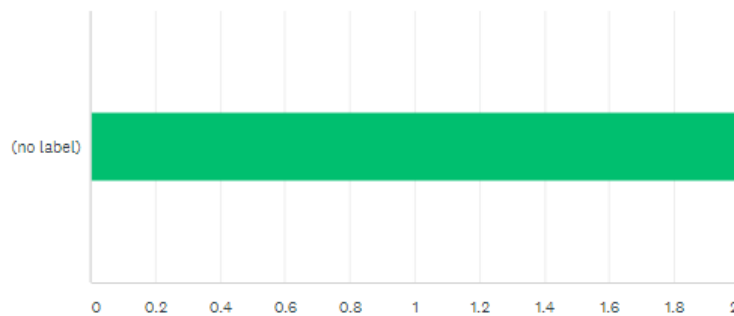
**Question 23 - The app offers a cash out function on some bets which can be valuable and reduce the risk of losing money.**

This statement represented value for money and a chance to cash out on bets when you possibly feel that the outcome of your bet will not be achieved. Your bet however must be on track or close to being on track to be a winning bet for the gambling company to offer you a cash out. The weighted average for this statement was 2.0 and 81% of participants agreed or strongly agreed with the statement, with 16% remaining neutral and just over 1% disagreeing or strongly disagreeing with the statement. The cost/sacrifice value on this option is significant as users can usually cash out prior to the event happening if a person changes their mind. However, the bet must be realistic and have a chance of winning for the gambling company to give you this option.

Q23

The app offers a cash out function on some bets which can be valuable and reduce the risk of losing money.

Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	22.50% 18	58.75% 47	16.25% 13	1.25% 1	1.25% 1	80	2.00

**Figure 33 - Survey Question 23 - The app offers a cash out function on some bets which can be valuable and reduce the risk of losing money.**



### 4.5.3 Relationship Value

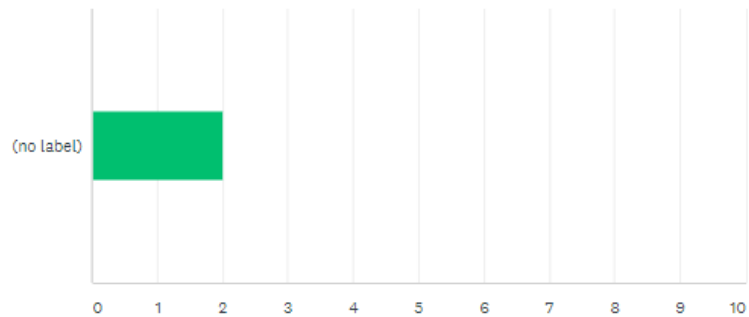
#### Question 24 - I feel the app has improved over time and is getting better and easier to use.

This statement relates to the relationship value for users and how the app has evolved over time which has continued to add value for the consumer and create a better relationship between app usage and the consumers usage. Over 81% of participants agreed or strongly agreed with this statement with 19% remaining neutral on it. None of the participants disagreed or strongly disagreed. This shows that gambling companies are continuing to update their smartphone apps to make them easier to use and customer friendly. The weighted average was 2.01.

Q24

I feel the app has improved over time and is getting better and easier to use.

Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	17.50% 14	63.75% 51	18.75% 15	0.00% 0	0.00% 0	80	2.01

Figure 34 - Survey Question 24 - I feel the app has improved over time and is getting better and easier to use.

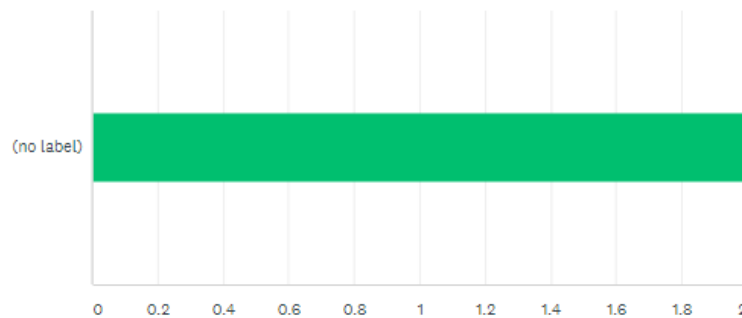
**Question 25 - I don't have to contact the bookmaker at all as the app and the information provided is straight forward and well displayed.**

This statement was related to the user and apps information. The relationship between the participants use of the app is trusted and detailed that the consumer does not have to engage with the company at all as the options provided within the app provide all the information the consumer needs to use the app and make a bet. Over 86% of users agreed or strongly agreed with this statement, with only 6% staying neutral and just over 7% disagreeing. The weighted average was 1.99.

Q25

I don't have to contact the bookmaker at all as the app and the information provided is straight forward and well displayed.

Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	22.50% 18	63.75% 51	6.25% 5	7.50% 6	0.00% 0	80	1.99

**Figure 35 - Survey Question 25 - I don't have to contact the bookmaker at all as the app and the information provided is straight forward and well displayed.**

**Question 26 - The convenience of the app and the speed of its navigation allows me to make bets quickly and capitalise on opportunities.**

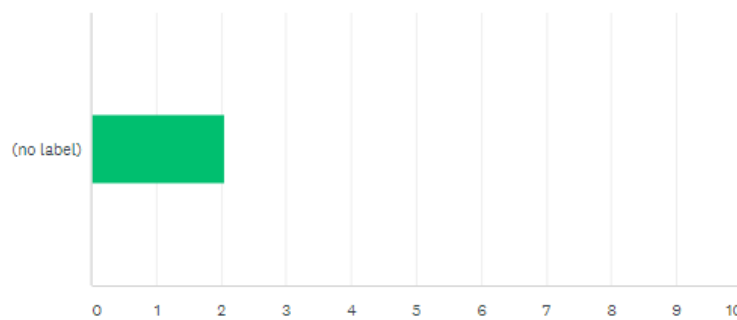
Question 26 and the statement it makes relates to the trust gained from using the gambling app and how quickly users can access information and make a bet. The relationship value gained from this trust informs users of the opportunities to decide quickly and access quickly the information required to make a bet. The reliability of using the app builds trust.

Exactly 80% of participants agreed or strongly agreed with this statement, with 20% remaining neutral and none disagreeing or strongly disagreeing. The weighted average was 2.05.

Q26

The convenience of the app and the speed of its navigation allows me to make bets quickly and capitalise on opportunities.

Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	15.00% 12	65.00% 52	20.00% 16	0.00% 0	0.00% 0	80	2.05

**Figure 36 - Survey Question 26 - The convenience of the app and the speed of its navigation allows me to make bets quickly and capitalise on opportunities.**

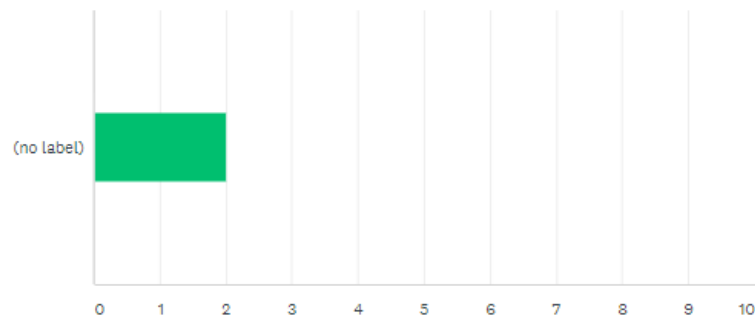
**Question 27 - Using the app is hassle-free. I use it for enjoyment and to win money.**

The relationship value of using the app again relates to its streamlined ability to use and enjoy. The statement on question 27 relates to the enjoyment of using the app and the ability of using it to make money. Over 82% agreed or strongly agreed with this statement, with 16% remaining neutral and just over 1% disagreeing. The weighted average was 2.01.

Q27

Using the app is hassle-free. I use it for enjoyment and to win money.

Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	17.50% 14	65.00% 52	16.25% 13	1.25% 1	0.00% 0	80	2.01

**Figure 37** - Survey Question 27 - Using the app is hassle-free. I use it for enjoyment and to win money.

#### 4.5.4 Co-creation Value

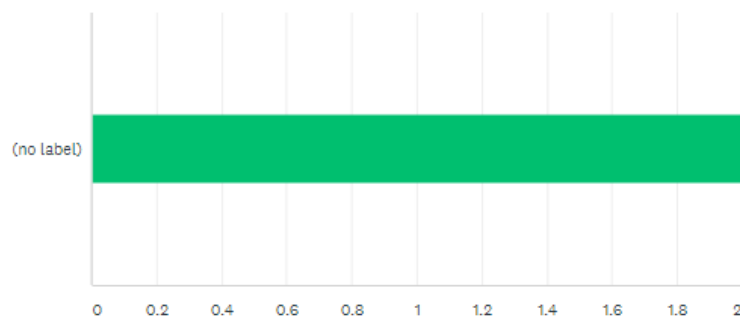
**Question 28 - The app allows me to easily customize my bets and create unique accumulators, doubles, trebles etc. to increase the odds to win more money.**

This statement was to do with co-creation and how gambling apps allow users to create their own value by amalgamating the different options that the bookmakers offer within the app. Users can create unique bets to generate more opportunities to win large sums of money. Consumers do not have to conform to the standard offers provided by bookmakers, instead they have the opportunity to produce accumulators, doubles, trebles and quadruple bets in their own exclusive way. Over 82% of participants agreed or strongly agreed with this statement with 11% remaining neutral and 6% disagreeing. The weighted average was 2.00.

Q28

The app allows me to easily customize my bets and create unique accumulators, doubles, trebles etc. to increase the odds to win more money.

Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	23.75% 19	58.75% 47	11.25% 9	6.25% 5	0.00% 0	80	2.00

**Figure 38 - Survey Question 28 - The app allows me to easily customize my bets and create unique accumulators, doubles, trebles etc. to increase the odds to win more money.**

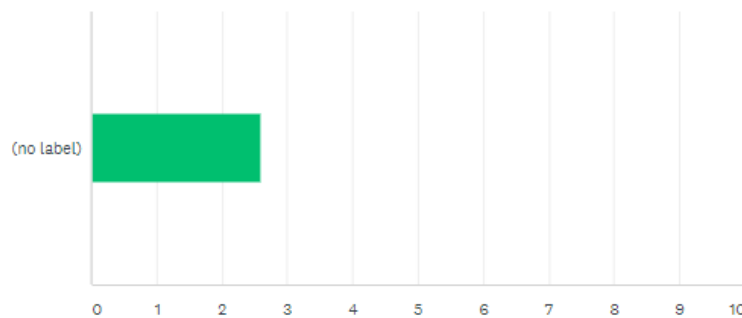
**Question 29 - I can contact the bookmakers to request odds on the possible outcome of events that I think may happen.**

Questions 29 related to the ability for gamblers to be able to contact the bookmaker to request odds on an event they may currently not be offering odds on. Some bookmakers have social media hashtag related to querying such events by using #AskPaddy for Paddy Power or #RequestABet for SkyBet. This companies actively encourage collaboration and co-creation of betting offers to meet the needs of gamblers and offer more targeted value to consumers. Over 42% remained neutral on this statement, possibly unsure of it as an offering. 6% strongly agreed with over 41% agreeing. Over 6% disagreed with nearly 4% strongly disagreeing. The weighted mean came in at 2.60 which is the lowest so far, but again, this may be a result of consumers not knowing about it or not experiencing it first-hand.

Q29

I can contact the bookmakers to request odds on the possible outcome of events that I think may happen.

Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	6.25% 5	41.25% 33	42.50% 34	6.25% 5	3.75% 3	80	2.60

**Figure 39** - Survey Question 29 - I can contact the bookmakers to request odds on the possible outcome of events that I think may happen.

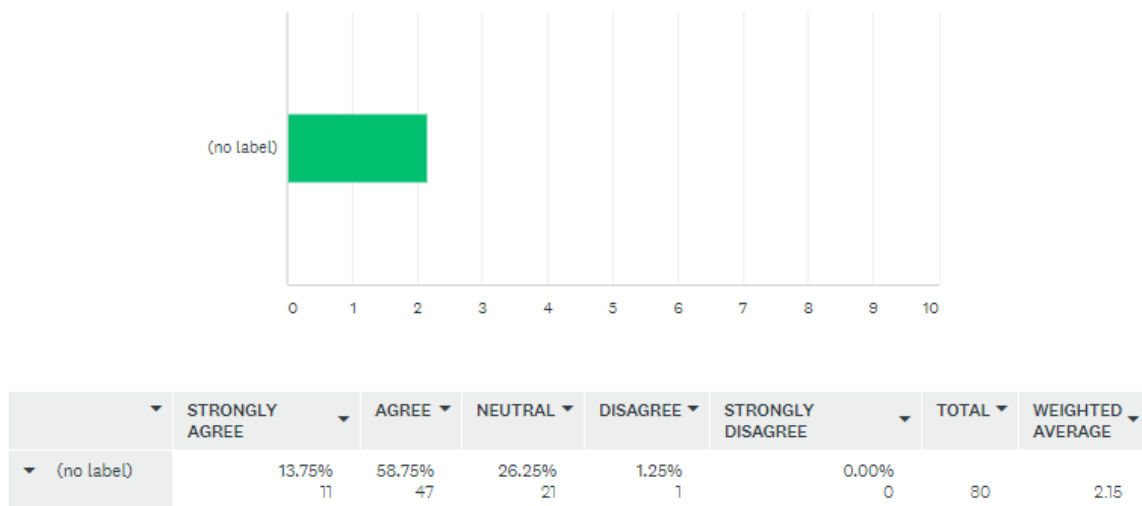
**Question 30 - The app allows me to decide the preferable outcome on sporting events and provides me with numerous options to consider.**

This statement relates to the options provided to consumers to decide their perceived outcome on sporting events. While the bookmaker may have offers on certain events and promotions, ultimately it is the gambler that creates the value by selecting their choice of risk for the reward that is offered. Over 72% of participants agreed or strongly agreed with this statement, with 26% remaining neutral and only 1% disagreeing. The weighted average was 2.15.

Q30

The app allows me to decide the preferable outcome on sporting events and provides me with numerous options to consider.

Answered: 80 Skipped: 16



**Figure 40** - Survey Question 30 - The app allows me to decide the preferable outcome on sporting events and provides me with numerous options to consider.

**Question 31 - The app doesn't prompt me to bet but simply gives me access when I wish to make a bet.**

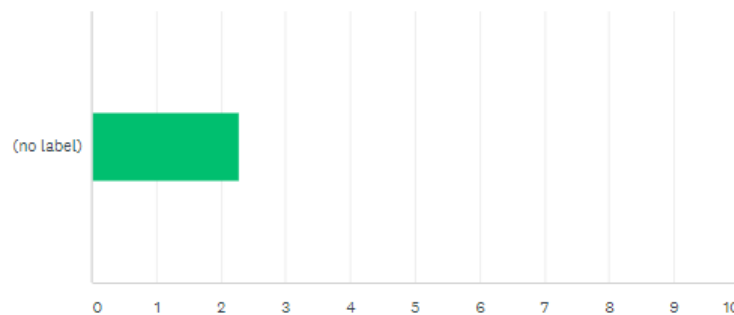
Questions 31 was a statement wondering if the creation of value is solely on the consumer or does the bookmaker somewhat force their offerings on gamblers. Some gambling smartphone apps use push notifications to inform consumers of new offers and promotions. These push notifications can pop up at any time and are not actively requested by users. While some may find them useful by prompted users of the potential to win money, others may find it evasive.

Exactly 75% of participants agreed or strongly agreed with this statement with 10% remaining neutral and 14% disagreeing and 1% strongly disagreeing. The weighted average was 2.27.

Q31

The app doesn't prompt me to bet but simply gives me access when I wish to make a bet.

Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	13.75% 11	61.25% 49	10.00% 8	13.75% 11	1.25% 1	80	2.27

**Figure 41 - Survey Question 31 - The app doesn't prompt me to bet but simply gives me access when I wish to make a bet.**



### 4.5.5 Brand Value

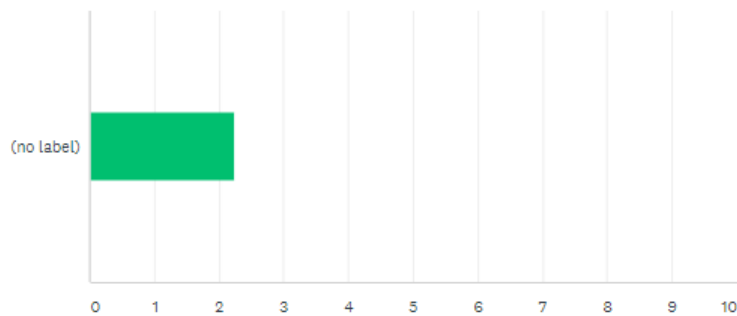
#### Question 32 - I enjoy betting with this company and they are my preferable brand of bookmakers.

This statement related to brand value and whether consumer enjoy the services offered by a specific brand of bookmaker or their preferred brand of bookmaker. Over 67% agreed or strongly agreed with this statement with 31% remaining neutral and over 1% strongly disagreeing. The weighted average was 2.23.

Q32

I enjoy betting with this company and they are my preferable brand of bookmakers.

Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	12.50% 10	55.00% 44	31.25% 25	0.00% 0	1.25% 1	80	2.23

Figure 42 - Survey Question 32 - I enjoy betting with this company and they are my preferable brand of bookmakers.

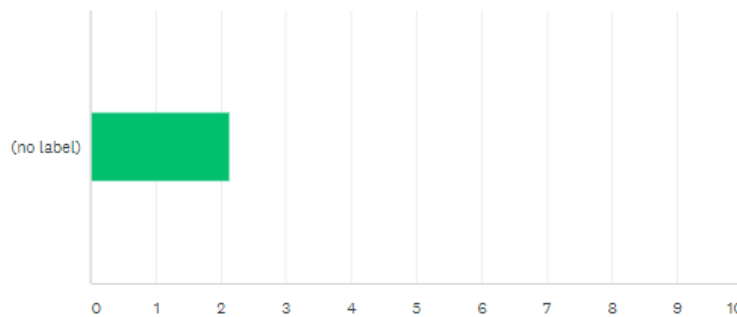
**Question 33 - I feel that the overall customer experience of using the app is good and worth my while**

Question 33’s statement relates to the value perceived from using the app and how consumers feel about the time they spend on the app. Over 78% of participants agreed or strongly agreed that their experience of using the app is worthwhile, with 20% remaining neutral and just over 1% strongly disagreeing. The weighted average was 2.13. This shows the brand value is high as nearly 4 in every 5 users enjoys using the app.

Q33

I feel that the overall customer experience of using the app is good and worth my while

Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	11.25% 9	67.50% 54	20.00% 16	0.00% 0	1.25% 1	80	2.13

**Figure 43 - Survey Question 33 - I feel that the overall customer experience of using the app is good and worth my while**

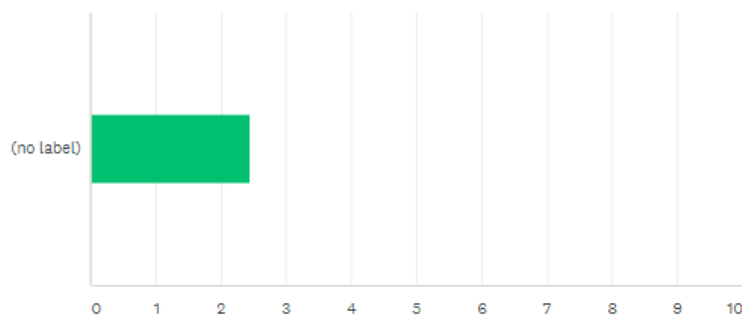
**Question 34 - I'm loyal to this bookmaker as the app does all I require of it.**

This statement was related to brand loyalty and how consumers feel in relation to their chosen gambling smartphone app. Over 61% of users agreed or strongly agreed with the above statement. Over 27% remained neutral on loyalty, with nearly 9% disagreeing and just over 2% strongly disagreeing. This shows that 3 in 5 users are loyal to their bookmaker as the value they attain from using the app is all that they require. The weighted average was 2.44.

Q34

I'm loyal to this bookmaker as the app does all I require of it.

Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	8.75% 7	52.50% 42	27.50% 22	8.75% 7	2.50% 2	80	2.44

**Figure 44 - Survey Question 34 - I'm loyal to this bookmaker as the app does all I require of it.**

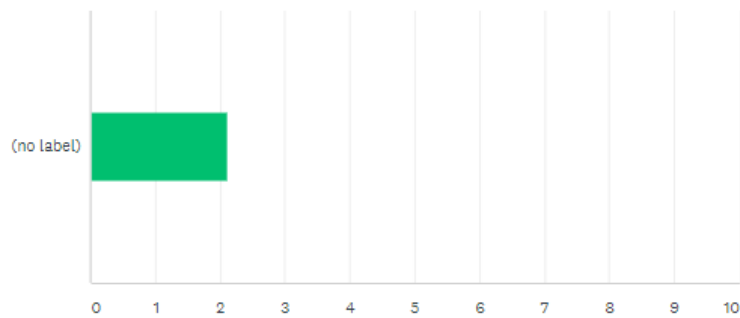
**Question 35 - The bookmaker app is a leading app in the market and I feel it is professionally put-together. There is no need for me to change apps and use a different company.**

This statement is again related to brand value and how users feel about their preferred brand of bookmaker and their smartphone app. Nearly 74% agreed or strongly agreed with this statement on brand value. Just over 22% were neutral in relation to it and only just over 2% disagreed, with 1% strongly disagreeing. The weighted average on this was 2.11 and it ultimately shows that nearly three quarters of consumers are happy with the app they use and don't see a need to change.

Q35

The bookmaker app is a leading app in the market and I feel it is professionally put-together. There is no need for me to change apps and use a different company.

Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	20.00% 16	53.75% 43	22.50% 18	2.50% 2	1.25% 1	80	2.11

**Figure 45 - Survey Question 35 - The bookmaker app is a leading app in the market and I feel it is professionally put-together. There is no need for me to change apps and use a different company.**

## **5.0 Chapter 5 – Conclusions and Recommendations**

### **5.1 Introduction**

The findings in this research provide evidence that sports smartphone gambling apps have a highly significant impact on the creation of customer value. Convenience of access to gambling, the quality of the apps, the reliability of performance and security, customization options and entertainment have all contributed to the creation of customer value. A noted point of concern is that it may add to the current gambling problems and addiction issues that are already prevalent in Irish society.

### **5.2 Insights**

There were some significant general insights into gambling app usage in the survey such as, 13% of women surveyed use a gambling smartphone app compared to 41% of men. In relation to loyalty, 61% of app users said they were loyal to the app bookmaker with 63% only having one gambling smartphone app on their smartphones. Paddy Power, Ireland's largest gambling company is dominant here with 84% of participants surveyed using their specific brand of app. Participants surveyed also stated how much they use gambling smartphone apps, with 45% stating they use them weekly with 16% using them daily. A worrying statistic of usage which backs up (Gainsbury, et al., 2012) study that showed that online gamblers bet more frequently than offline gamblers.

### **5.3 Value Creation**

Under the framework of customer value creation used in this dissertation, the survey results speak for themselves. The functional value of the apps was hugely important. When making the choice of gambling app to use, 'ease of use to make a bet' was selected by 60% of those surveyed. Also, according to the survey results, participants were largely happy with the quality, reliability, security, performance and speed of using the apps. As the apps have evolved they have offered more functionality and users view them as non-intrusive and interact with the apps more regularly as a result (Hutton & Rodnick, 2009).

As mentioned previously, money is the driving force that generates excitement for users when gambling (Wulfert, et al., 2005) and from a cost/sacrifice value viewpoint, participants were

happy with the value of the services offered by bookmakers. The survey results showed that the apps were displaying competitive odds which were effortless to access with the app and not taking up too much of their time. Also, the cash out option was stated as of significant value to participants with 81% agreeing that the option to cash out a bet before the event is over provides a substantial opportunity for users to save or win money when they think their live bet may not have the desired outcome.

The relationship value results from the survey show that users feel that the apps are getting better and better, the information and options are all there and the convenience of access and easy navigation is providing users with a value driven experience which is hassle-free and enjoyable. Relationship value is further highlighted by the results of the co-creation value questions within the survey. Gambling companies are offering services that consumers want while at the same time offering users with the ability to request services, e.g. request odds on an event that the bookmaker may not have within the app. Also, 83% of users agreed that the ability to customise bets to individual needs such as doubles, trebles and accumulators on the app was a valuable way to co-create and allows users to shape their unique experience and create their own risk and reward options.

In relation to brand value, 67% of participants surveyed agreed that they enjoy betting with their preferred bookmaker and as mentioned previously, 61% stated that they are loyal to their bookmaker of choice. Over 78% agreed that their experience of using their brand app is worth their while with 84% agreed that their app of choice is professional, and they have no intention of changing and using a different brand.

Interestingly nearly 61% of gambling smartphone app users follow their choice of bookmaker on social media. When asked for the reasons for following, participants selected several options: Entertainment 72%, Banter 57%, Promotions 32% and Odds Updates 19%. With the lowest option selected being 'To make money' 4% (2 people). Considering that making money is the prime objective of gambling companies, their consumers may not see or recognise this digital marketing strategy as a touchpoint in their integrated marketing communications.

Social media has allowed gambling companies a platform to spread their tentacles to all facets of society but at the same time these companies understand and acknowledge their target

market. They are actively infiltrating consumer smartphone gambling apps with specific artificial intelligence to further enhance user experience and deliver their services in areas of the users' interest to get the consumer to gamble more. The apps have provided users with ease of access to a streamlined service and a variety of gambling options all accessible from any location with Wi-Fi or a data signal. While companies have created customer value through their smartphone apps, the long-term effects may be a strain on society.

## 5.4 Gambling Regulation

In February 2018 the GAA (Gaelic Games Association) at their annual congress in Croke Park voted to ban all sponsorship from gambling companies. The motion was supported by 93% of the 270 delegates and it included banning sponsorship of playing gear, facilities and teams. The president of Ireland, Michael D. Higgins has recently stated that he is very concerned about gambling in sport and feels they should ban gambling advertising by stating:

“If I had my way, I wouldn't have advertising or any access to gambling platforms in sport at all. I really worry when I read the cases...”

“Having care for everyone who participates means not exposing them when in fact they are vulnerable. How you deal with vulnerabilities is by preparing them of course...”

“But you can't do everything through education. For too long in Ireland we often ignore problems that are staring us in the face.” (Leahy, 2018)

At time of writing, a bill regulating gambling was presented to the Dáil on the 21<sup>st</sup> of February 2018; the Gambling Control Bill. As of the 9<sup>th</sup> of May 2018, the general principles of the bill were being debated and it is at stage two of an eleven stage process, see figure 46.



Figure 46 - Gambling Control Bill stage two currently before Dáil Éireann (*Houses of Oireachtas, 2018*)

The government first approved the general scheme in 2013, but it is yet to be finalised. A gambling regulatory authority is also to be established, but again, there is no timeframe in place to date.

It is hoped that the Gambling Control Bill, when enacted, would help to regulate the gambling industry in Ireland, put measures in place to help and protect problem gamblers and assist in implementing necessary restrictions where required.

## **5.5 Significance of Findings**

The data gathered and analysed in this dissertation suggests that gambling companies will continue to provide value to consumers, entertain them through social media channels and persuade them to download and use their apps, given its pervasiveness and effectiveness to date. There is no doubt that their users will continue to grow and with the revenue that is being pumped into their marketing strategies, their target market will expand.

As the research survey showed, 52% of users did not have an online betting account prior to using smartphone apps. This shows that gambling companies have now bypassed their online account offering to users by promoting their smartphones apps. Now consumers have betting opportunities in their pocket rather than needing to access a laptop or computer which leads to more of an audience to market their services.

While the value offered through gambling apps to consumers is increasingly enjoyed and accessed, the societal effects of addiction to gambling no doubt will increase. The question consumers need to ask is 'Is the perceived customer value creation for me or am I just a pawn for company profit?'. As gambling as a pastime has increased and studies showed that gambling is perceived by some as 'buying entertainment' how can it be stopped or slowed down?

The long-term societal impact of modern gambling accessibility, of course, remains to be seen, though the data gathered in this dissertation suggests quite a pessimistic forecast. While many enjoy the experience of gambling, there are many in society who are vulnerable to addiction. Judging by the data gathered for this research, gambling companies will continue to increase their profits, continue to entice more customers into using their gambling apps and continue to



create more perceived value for their current customers to gamble more often. With smartphone usage forecasted to grow in Ireland (Statista, 2018), the market for gambling apps will increase. Increased marketing spend in numerous areas means that gambling advertising is hard to ignore and the problems and issues relating to gambling in the future, as a result, may be more widespread. It is argued that an individual's gambling problems can impact an additional 10 people (Russell, et al., 2014). This shows that problem gambling and its related issues will affect more than just the gambler. It may take government intervention and new regulations to stop its further acceleration before it gets out of control.

Between 2012 and 2013, the Australian government carried out an inquiry into the advertising and promotion of gambling services in sport. The inquiry was conducted in relation to television advertising, sponsorship, in-play promotions, exposure and influence on children, and the links to problem gambling (Parliamentary Joint Select Committee on Gambling Reform, 2013). This has led to public health models being developed and endorsed which cover a broad range of commercial, environmental, socio-cultural and individual factors, which can help reduce the harms caused by gambling (Public Health Association of Australia, 2014). The Australian government has been pro-active in addressing issues around gambling and gambling culture, and research in this dissertation backs up its potential necessity in Ireland.

## **5.6 Recommendations for Further Research**

### **5.6.1 Prevalence**

There are a number of areas where further research could be conducted in relation to the research question. The most pressing area for further research relates to the observation that approximately 4 in 10 men use a gambling smartphone app. This figure seems dangerously high and further research must be conducted into how and why so many young men are using these apps as a form of entertainment and as a pastime. This research could allow lawmakers to put in place necessary restrictions where required.

### **5.6.2 Digital Marketing Regulation**

It would be beneficial to society and lawmakers to better understand and bring to light the extent of how gambling companies use their digital marketing strategies to expand their reach and attract new gamblers. Considering the money that is being pumped into 'Big Data' to

automate services and understand human behaviour, it is imperative that these strategies are not preying on the most vulnerable; the impressionable youth of society and those with gambling problems.

### **5.6.3 Transparency and Accountability**

Considering gambling companies are not required to publicly show their data analytics, there should be research into real usage figures, active users and money gambled per year, per company. A transparent business with responsibilities to the public and its customers. This would allow the public to know how much the companies are making from different demographics in different counties across Ireland. It would help tackle the issues and allow politicians to put laws in place to regulate usage and access.

### **5.6.4 Gambling Usage among Women**

From the study, 13% of women use gambling apps. There should be research into what women are gambling on and how they took it up as a pastime. The target market generally is males however with over 1 in 10 women now accessing smartphone gambling apps, research into the reasons and the attractiveness of gambling could be studied to understand nationwide usage figures before they grow, and more women get sucked into gambling that previously would not have been interested.

## **5.7 Recommendations for Practitioners**

The gambling industry in Ireland is on the up and bookmakers are aware of how gambling smartphone apps have changed the landscape of gambling. The biggest issue for practitioners now could be that their marketing strategies and value creation starts to work against them.

The Rutland Centre is Ireland's largest private addiction rehabilitation centre and describes gambling addiction as "The uncontrollable urge to keep gambling despite the toll it takes on your life. A gambling addiction has the potential to ruin more than one life if left untreated" (Rutland Centre, 2017).

While many companies state that they donate large sums of money to charities who offer counselling and help for gambling addiction, ultimately, they are creating these addicts from

the value creation and services they offer. As gambling grows and more gamblers begin to sign up for help in their addictions, nationwide exposure to the prevalence of gambling and the issues have come to light. Eventually, this will lead to regulations on the industry or the banning of advertising opportunities on platforms that are used to persuade and incentivise like the GAA as discussed previously.

Do gambling companies suddenly create a conscience or will it be up to government to restrict their strategies and influence? Seems like gambling companies need to make the first move in tackling the issues before laws are enacted which may suppress their activities.

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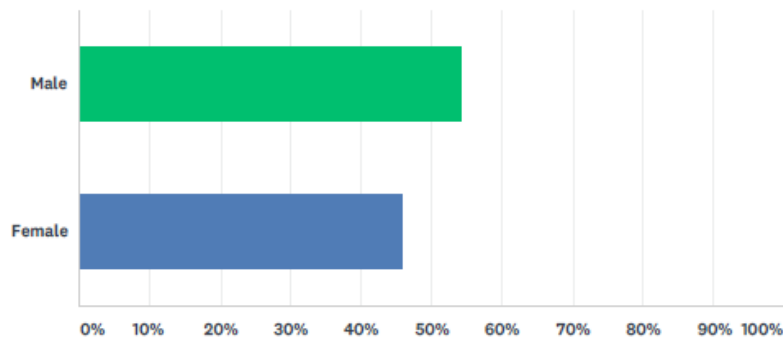
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## 7.0 Appendices

### 7.1 Appendix 1 – Pilot Survey Results

#### Q1 Are you male or female?

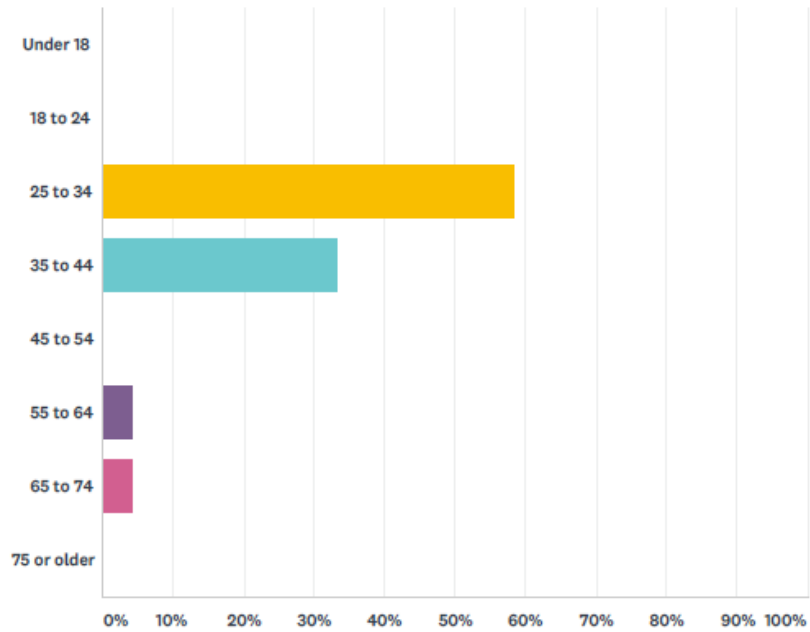
Answered: 24 Skipped: 0



ANSWER CHOICES	RESPONSES	
Male	54.17%	13
Female	45.83%	11
TOTAL		24

## Q2 What is your age?

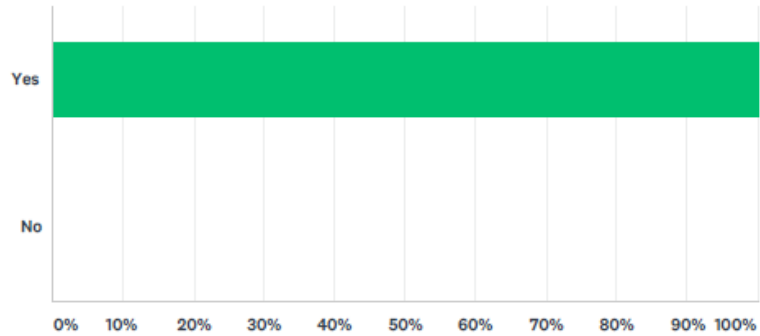
Answered: 24 Skipped: 0



ANSWER CHOICES	RESPONSES	
Under 18	0.00%	0
18 to 24	0.00%	0
25 to 34	58.33%	14
35 to 44	33.33%	8
45 to 54	0.00%	0
55 to 64	4.17%	1
65 to 74	4.17%	1
75 or older	0.00%	0
<b>TOTAL</b>		<b>24</b>

### Q3 Do you own a Smartphone?

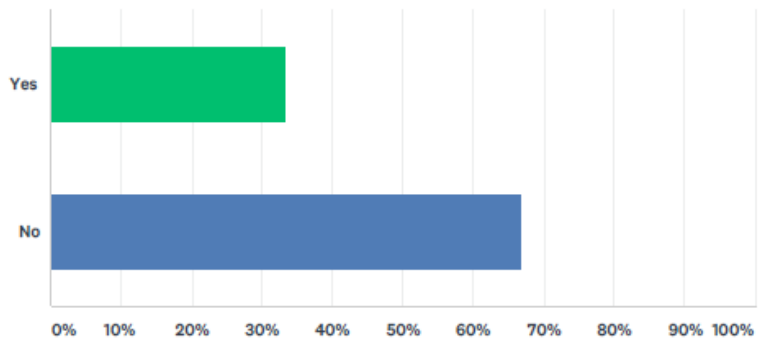
Answered: 24 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	100.00%	24
No	0.00%	0
TOTAL		24

### Q4 Do you have a sports gambling smartphone app on your smartphone i.e Paddy Power, Bet365, Ladbrokes, Boyle Sports, Coral, Bet Fair etc?

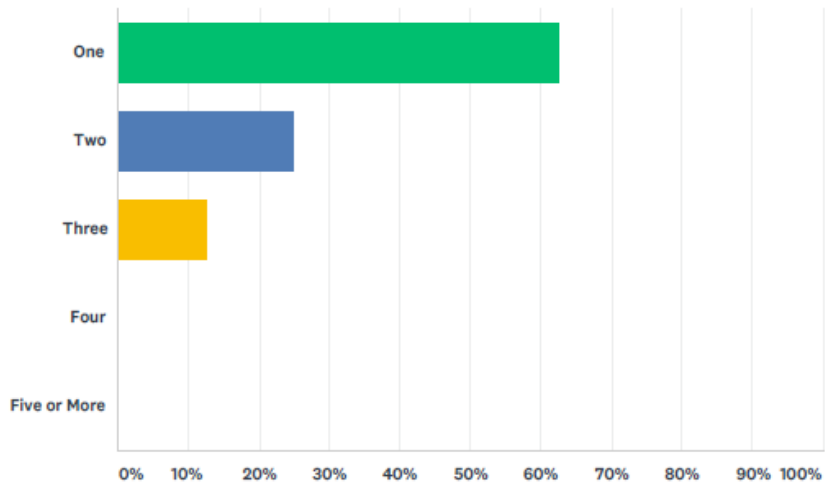
Answered: 24 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	33.33%	8
No	66.67%	16
TOTAL		24

## Q5 How many bookmakers do you have an online account with?

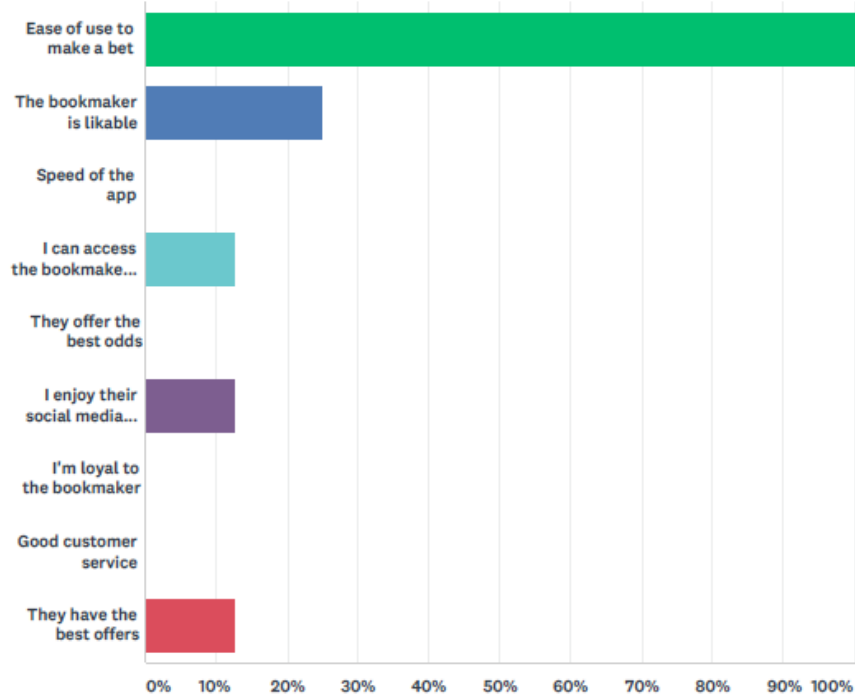
Answered: 8 Skipped: 16



ANSWER CHOICES	RESPONSES	
One	62.50%	5
Two	25.00%	2
Three	12.50%	1
Four	0.00%	0
Five or More	0.00%	0
<b>TOTAL</b>		<b>8</b>

## Q6 What made you choose the bookmaker/s app to use for your bets? (Select all that apply)

Answered: 8 Skipped: 16

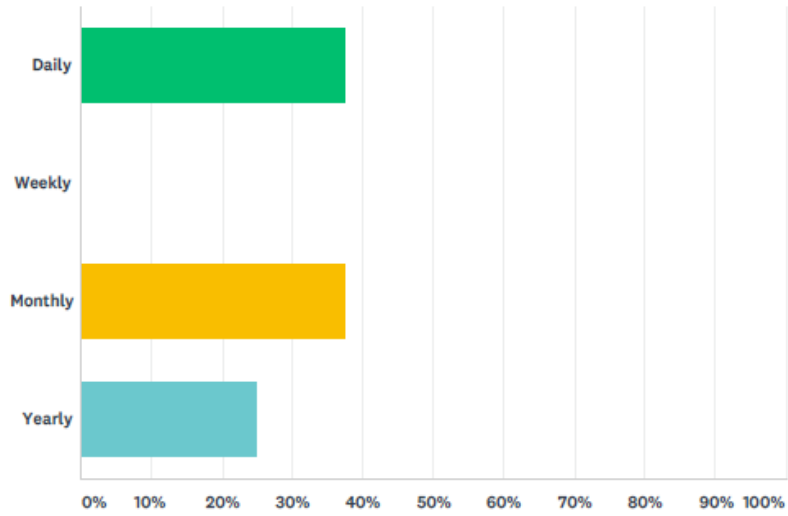


ANSWER CHOICES	RESPONSES	
Ease of use to make a bet	100.00%	8
The bookmaker is likable	25.00%	2
Speed of the app	0.00%	0
I can access the bookmaker shops locally if required	12.50%	1
They offer the best odds	0.00%	0
I enjoy their social media content	12.50%	1
I'm loyal to the bookmaker	0.00%	0
Good customer service	0.00%	0
They have the best offers	12.50%	1
Total Respondents: 8		



### Q7 How often do you use the app/s?

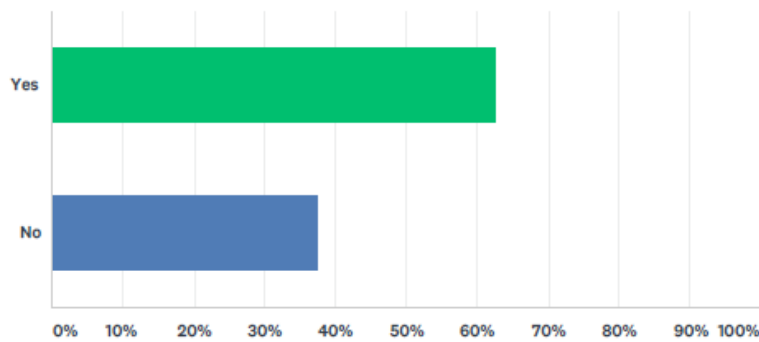
Answered: 8 Skipped: 16



ANSWER CHOICES	RESPONSES	
Daily	37.50%	3
Weekly	0.00%	0
Monthly	37.50%	3
Yearly	25.00%	2
<b>TOTAL</b>		<b>8</b>

### Q8 Do you follow the bookmaker/s on your social media account/s?

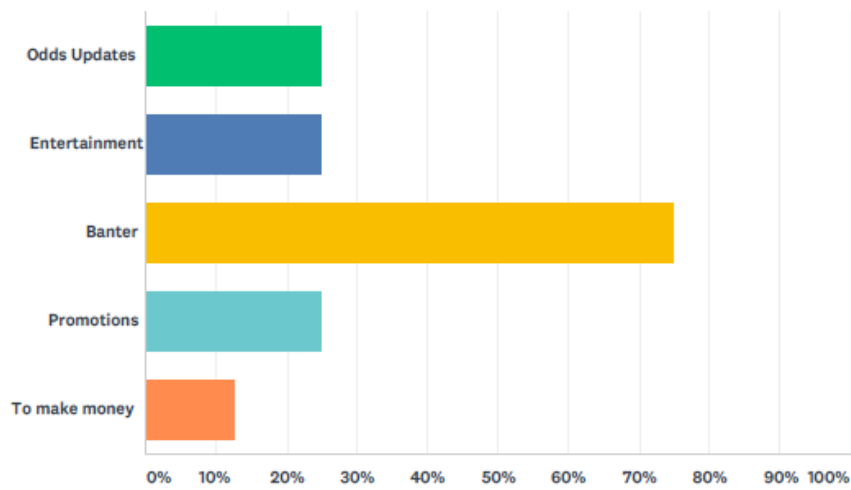
Answered: 8 Skipped: 16



ANSWER CHOICES	RESPONSES	
Yes	62.50%	5
No	37.50%	3
<b>TOTAL</b>		<b>8</b>

### Q9 Why do you follow them on social media? (Select all that apply)

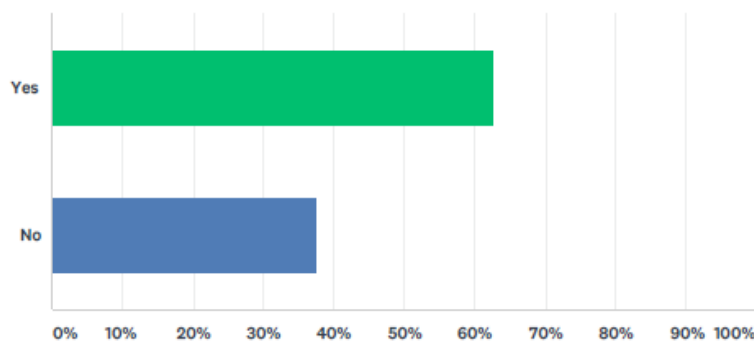
Answered: 8 Skipped: 16



ANSWER CHOICES	RESPONSES
Odds Updates	25.00% 2
Entertainment	25.00% 2
Banter	75.00% 6
Promotions	25.00% 2
To make money	12.50% 1
Total Respondents: 8	

### Q10 Do you feel that bookmakers should engage and entertain their followers on social media as well as offer the best odds on events?

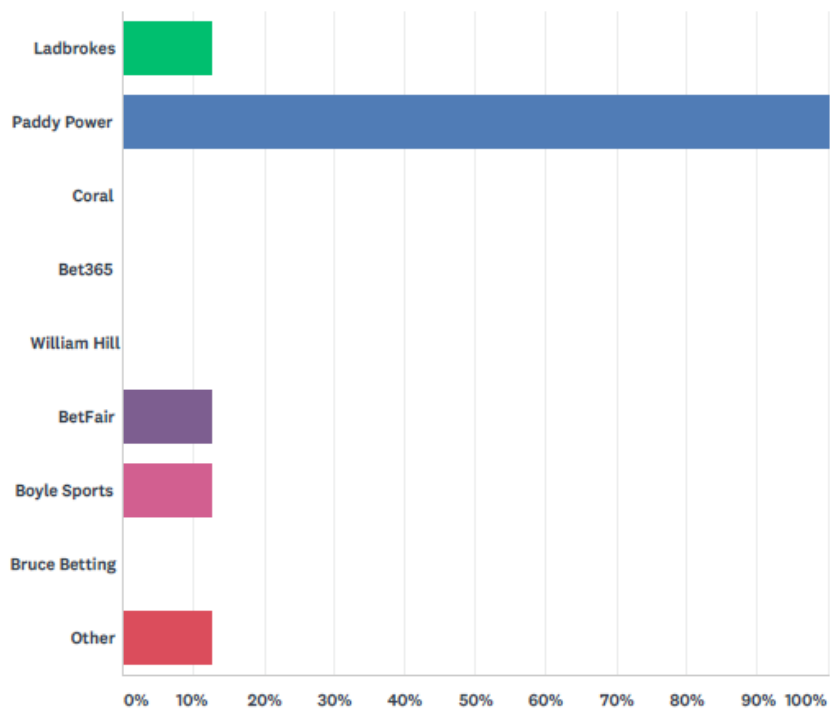
Answered: 8 Skipped: 16



ANSWER CHOICES	RESPONSES
Yes	62.50% 5
No	37.50% 3
TOTAL	8

## Q11 Who do you have an online account with? (Select all that apply)

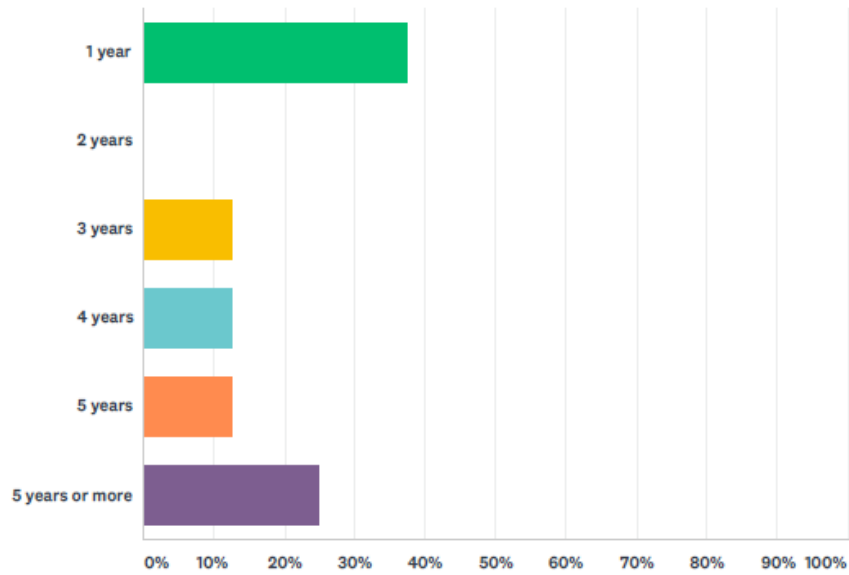
Answered: 8 Skipped: 16



ANSWER CHOICES	RESPONSES	
Ladbrokes	12.50%	1
Paddy Power	100.00%	8
Coral	0.00%	0
Bet365	0.00%	0
William Hill	0.00%	0
BetFair	12.50%	1
Boyle Sports	12.50%	1
Bruce Betting	0.00%	0
Other	12.50%	1
Total Respondents: 8		

## Q12 How long have you been using gambling smartphone apps?

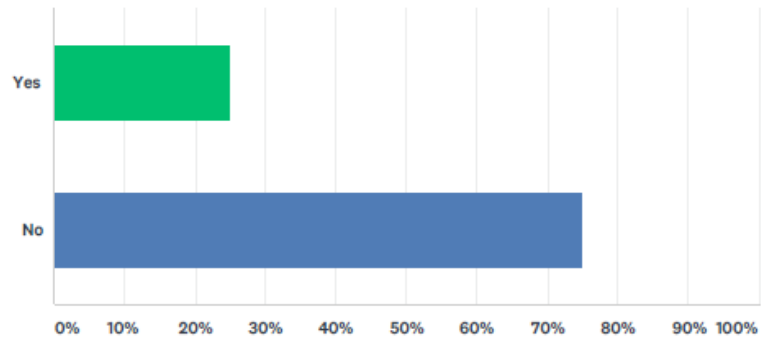
Answered: 8 Skipped: 16



ANSWER CHOICES	RESPONSES	
1 year	37.50%	3
2 years	0.00%	0
3 years	12.50%	1
4 years	12.50%	1
5 years	12.50%	1
5 years or more	25.00%	2
<b>TOTAL</b>		<b>8</b>

### Q13 Did you have a online account prior to downloading the smartphone app/s?

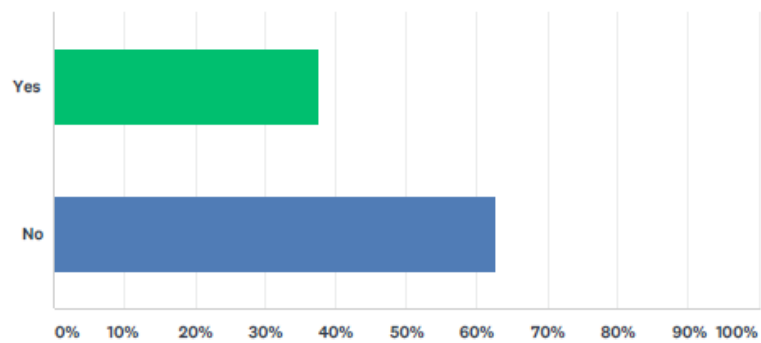
Answered: 8 Skipped: 16



ANSWER CHOICES	RESPONSES	
Yes	25.00%	2
No	75.00%	6
TOTAL		8

### Q14 Do you think you have won more money than what you have bet since using the app/s

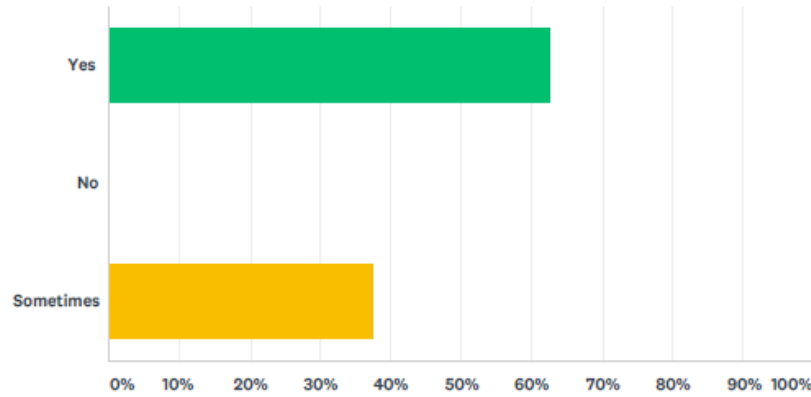
Answered: 8 Skipped: 16



ANSWER CHOICES	RESPONSES	
Yes	37.50%	3
No	62.50%	5
TOTAL		8

**Q15 In relation to the functional value relating to using bookmaker smartphone apps, do you feel that the quality, cost, reliability, performance and security are up to scratch and the app does what it's supposed to do?**

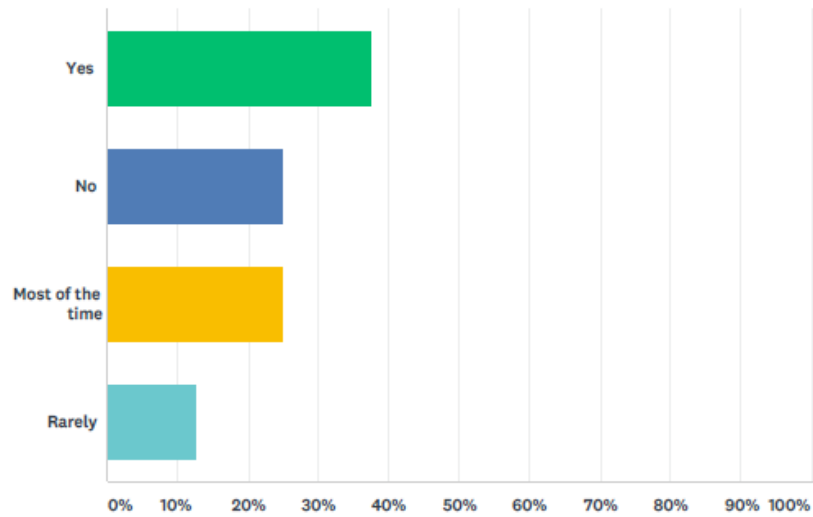
Answered: 8 Skipped: 16



ANSWER CHOICES	RESPONSES	
Yes	62.50%	5
No	0.00%	0
Sometimes	37.50%	3
<b>TOTAL</b>		<b>8</b>

Q16 In relation to the cost/sacrifice value, do you feel you get value for money using the app and making bets with the bookmaker?

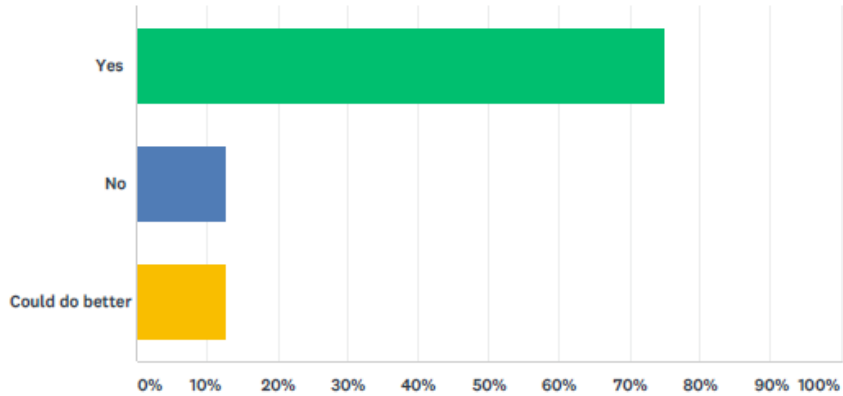
Answered: 8 Skipped: 16



ANSWER CHOICES	RESPONSES	
Yes	37.50%	3
No	25.00%	2
Most of the time	25.00%	2
Rarely	12.50%	1
<b>TOTAL</b>		<b>8</b>

Q17 Do you feel that the overall customer experience of using the app is good and worth your while?

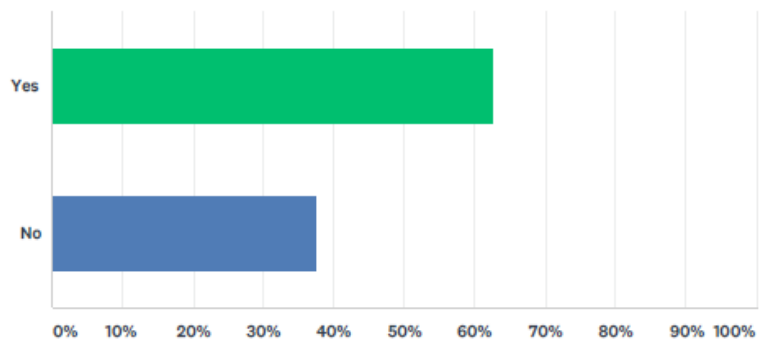
Answered: 8 Skipped: 16



ANSWER CHOICES	RESPONSES	
Yes	75.00%	6
No	12.50%	1
Could do better	12.50%	1
TOTAL		8

Q18 Do you feel you can contact the bookmaker to enquire about odds for any upcoming event if you wanted?

Answered: 8 Skipped: 16

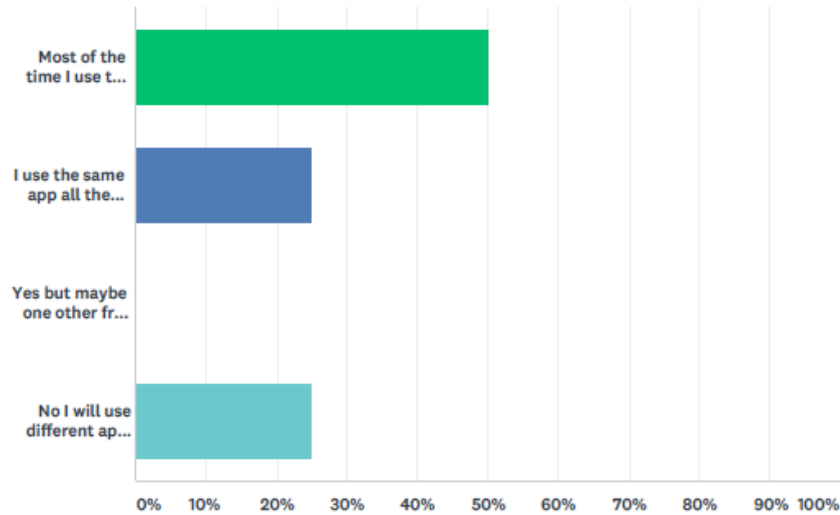


ANSWER CHOICES	RESPONSES	
Yes	62.50%	5
No	37.50%	3
TOTAL		8



### Q19 When you are placing bets do you use the same bookmaker app or do you use one of their competitors from time to time?

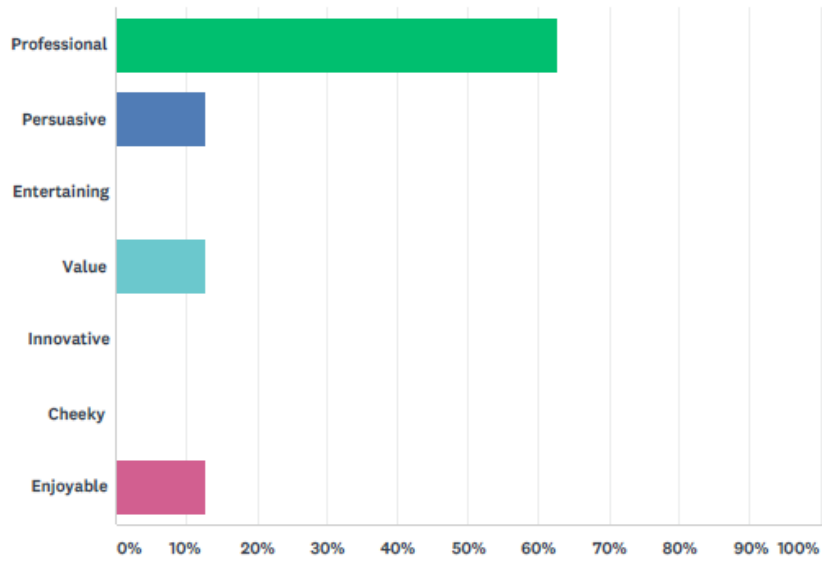
Answered: 8 Skipped: 16



ANSWER CHOICES	RESPONSES	
Most of the time I use the same app	50.00%	4
I use the same app all the time	25.00%	2
Yes but maybe one other from time to time	0.00%	0
No I will use different apps depending on the value of the odds	25.00%	2
<b>TOTAL</b>		<b>8</b>

Q20 Please select one of the options below to describe your feelings towards using the services of your favourite bookmaker?

Answered: 8 Skipped: 16

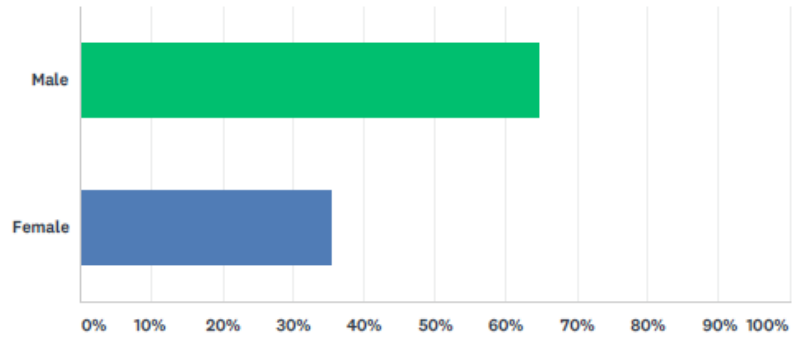


ANSWER CHOICES	RESPONSES	
Professional	62.50%	5
Persuasive	12.50%	1
Entertaining	0.00%	0
Value	12.50%	1
Innovative	0.00%	0
Cheeky	0.00%	0
Enjoyable	12.50%	1
<b>TOTAL</b>		<b>8</b>

## 7.2 Appendix 2 – Full Survey Results

### Q1 Are you male or female?

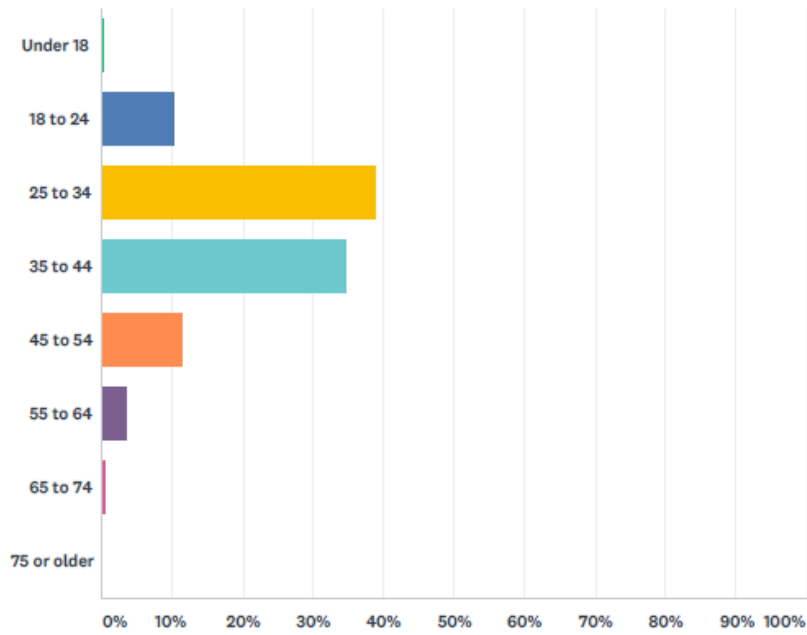
Answered: 455 Skipped: 0



ANSWER CHOICES	RESPONSES	
Male	64.62%	294
Female	35.38%	161
TOTAL		455

## Q2 What is your age?

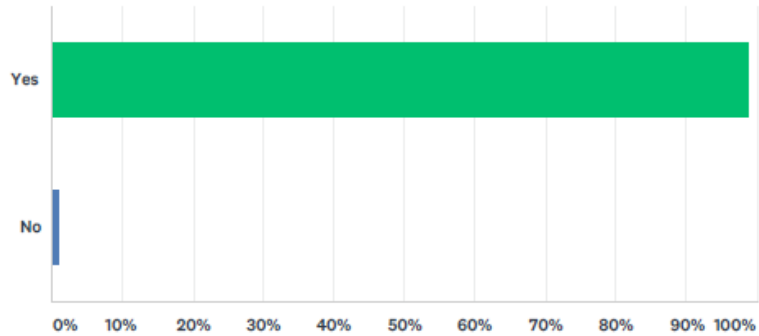
Answered: 455 Skipped: 0



ANSWER CHOICES	RESPONSES	
Under 18	0.44%	2
18 to 24	10.33%	47
25 to 34	38.90%	177
35 to 44	34.73%	158
45 to 54	11.43%	52
55 to 64	3.52%	16
65 to 74	0.66%	3
75 or older	0.00%	0
<b>TOTAL</b>		<b>455</b>

### Q3 Do you own a Smartphone?

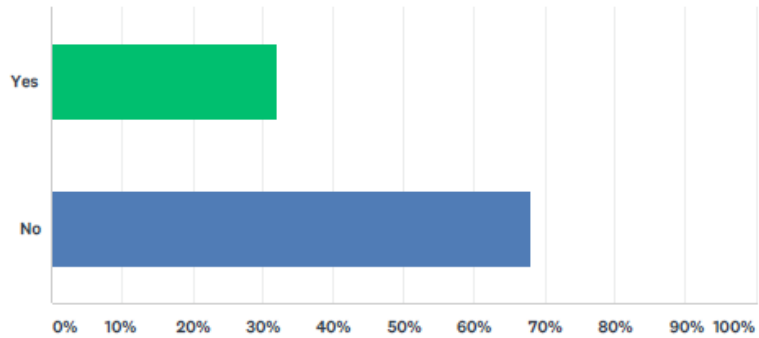
Answered: 455 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	98.90%	450
No	1.10%	5
TOTAL		455

### Q4 Do you have a sports gambling smartphone app on your smartphone i.e Paddy Power, Bet365, Ladbrokes, Boyle Sports, Coral, Bet Fair etc?

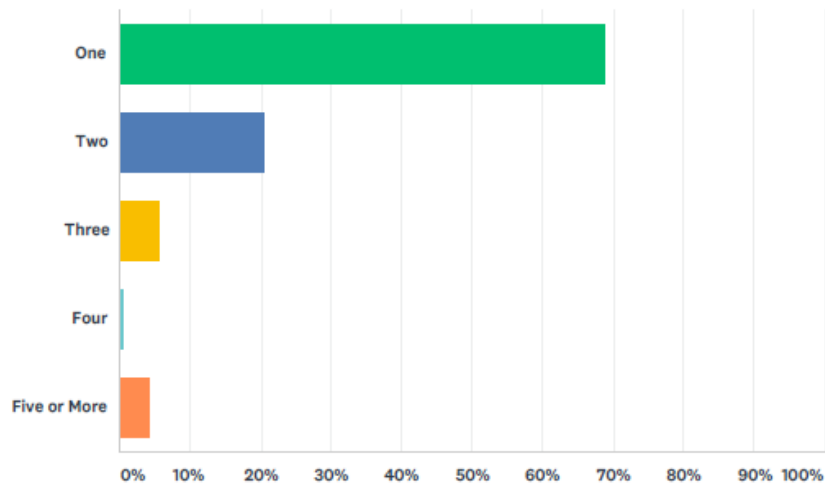
Answered: 447 Skipped: 8



ANSWER CHOICES	RESPONSES	
Yes	31.99%	143
No	68.01%	304
TOTAL		447

## Q5 How many bookmakers do you have an online account with?

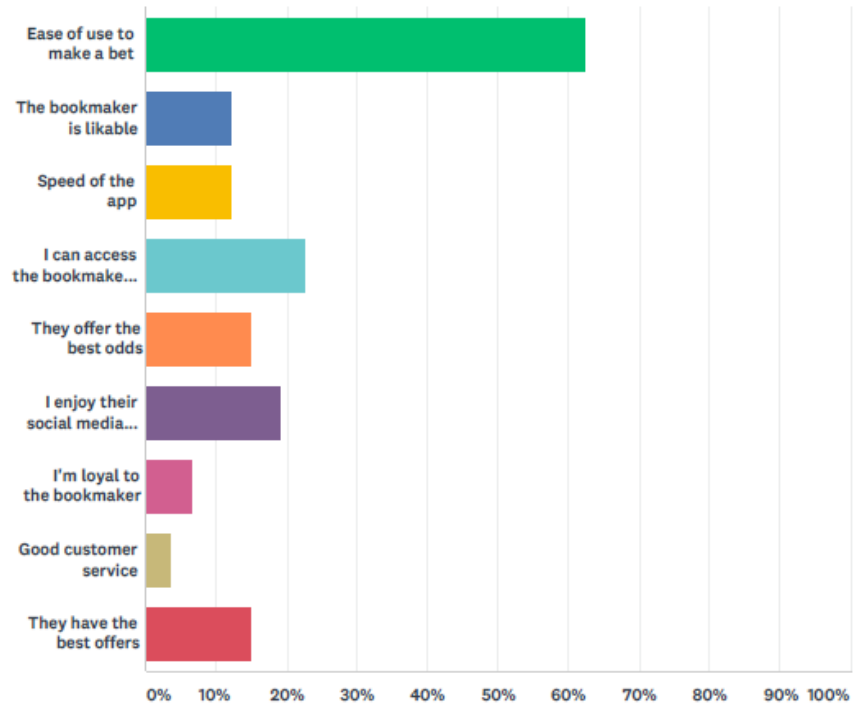
Answered: 141 Skipped: 314



ANSWER CHOICES	RESPONSES	
One	68.79%	97
Two	20.57%	29
Three	5.67%	8
Four	0.71%	1
Five or More	4.26%	6
<b>TOTAL</b>		<b>141</b>

## Q6 What made you choose the bookmaker/s app to use for your bets? (Select all that apply)

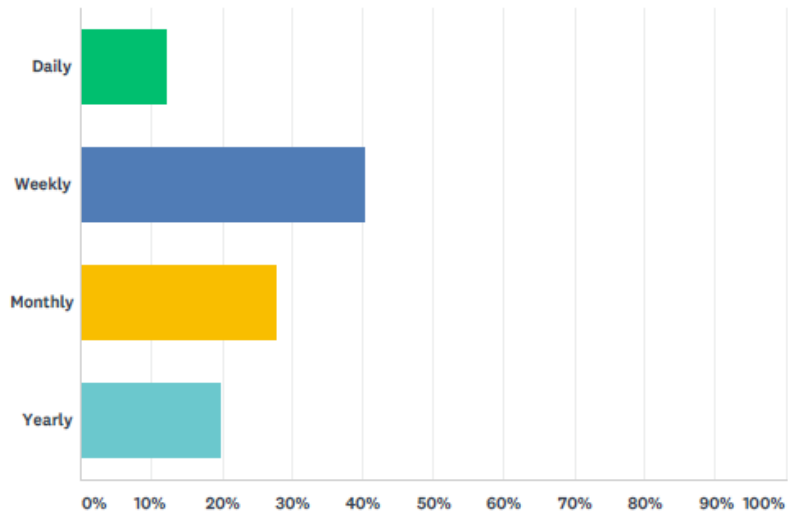
Answered: 141 Skipped: 314



ANSWER CHOICES	RESPONSES	
Ease of use to make a bet	62.41%	88
The bookmaker is likable	12.06%	17
Speed of the app	12.06%	17
I can access the bookmaker shops locally if required	22.70%	32
They offer the best odds	14.89%	21
I enjoy their social media content	19.15%	27
I'm loyal to the bookmaker	6.38%	9
Good customer service	3.55%	5
They have the best offers	14.89%	21
Total Respondents: 141		

### Q7 How often do you use the app/s?

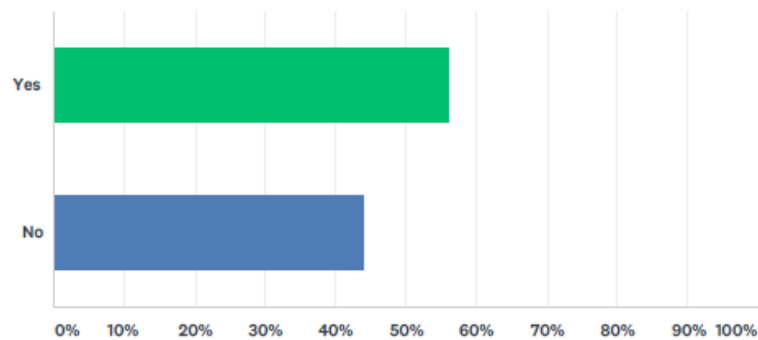
Answered: 141 Skipped: 314



ANSWER CHOICES	RESPONSES	
Daily	12.06%	17
Weekly	40.43%	57
Monthly	27.66%	39
Yearly	19.86%	28
TOTAL		141

### Q8 Do you follow the bookmaker/s on your social media account/s?

Answered: 141 Skipped: 314

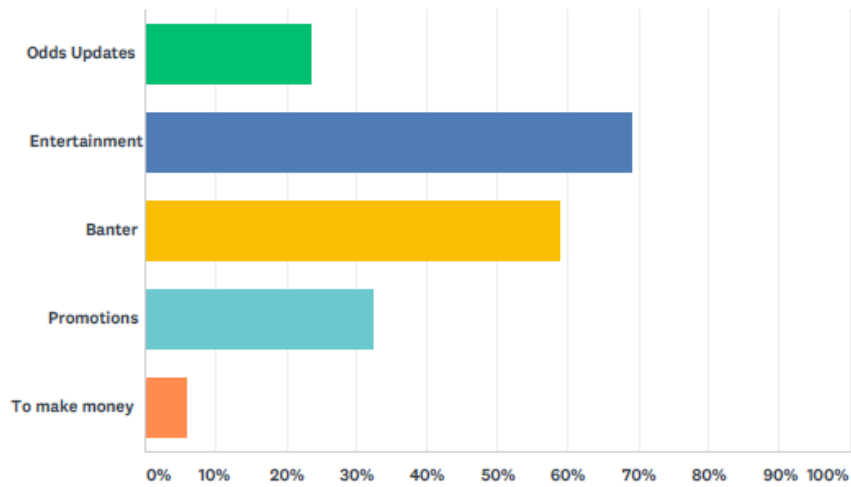


ANSWER CHOICES	RESPONSES	
Yes	56.03%	79
No	43.97%	62
TOTAL		141



### Q9 Why do you follow them on social media? (Select all that apply)

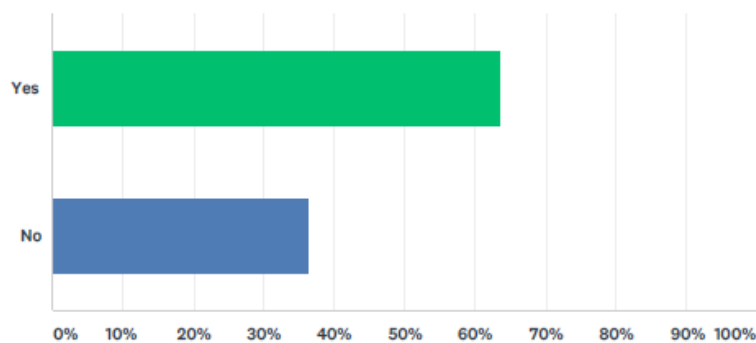
Answered: 68 Skipped: 387



ANSWER CHOICES	RESPONSES	
Odds Updates	23.53%	16
Entertainment	69.12%	47
Banter	58.82%	40
Promotions	32.35%	22
To make money	5.88%	4
Total Respondents: 68		

### Q10 Do you feel that bookmakers should engage and entertain their followers on social media as well as offer the best odds on events?

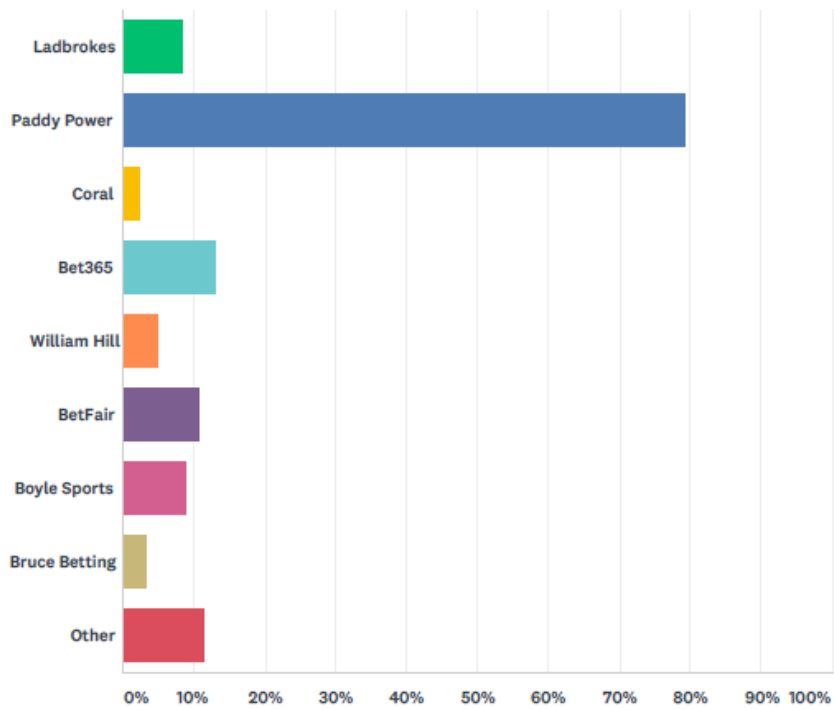
Answered: 121 Skipped: 334



ANSWER CHOICES	RESPONSES	
Yes	63.64%	77
No	36.36%	44
TOTAL		121

## Q11 Who do you have an online account with? (Select all that apply)

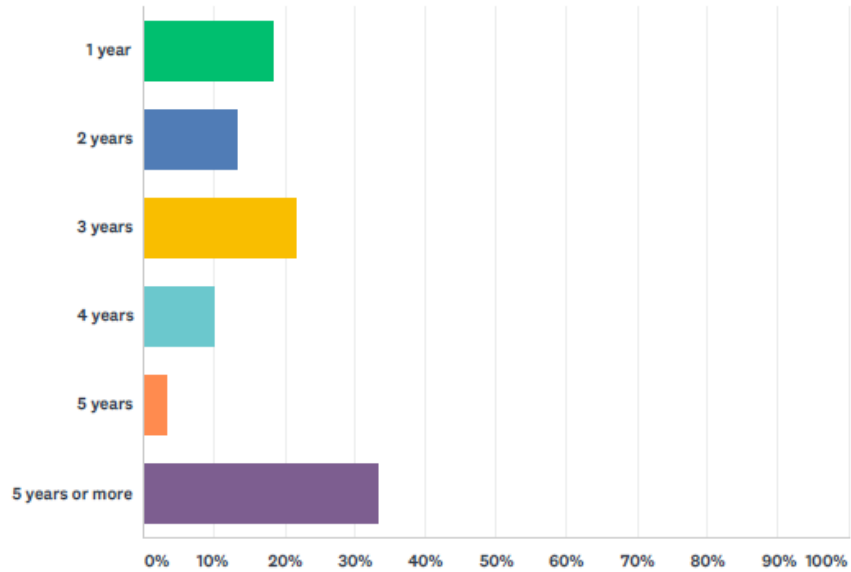
Answered: 121 Skipped: 334



ANSWER CHOICES	RESPONSES	
Ladbrokes	8.26%	10
Paddy Power	79.34%	96
Coral	2.48%	3
Bet365	13.22%	16
William Hill	4.96%	6
BetFair	10.74%	13
Boyle Sports	9.09%	11
Bruce Betting	3.31%	4
Other	11.57%	14
Total Respondents: 121		

## Q12 How long have you been using gambling smartphone apps?

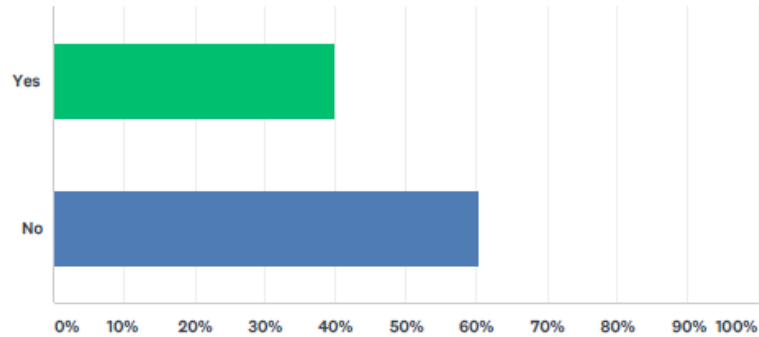
Answered: 120 Skipped: 335



ANSWER CHOICES	RESPONSES	
1 year	18.33%	22
2 years	13.33%	16
3 years	21.67%	26
4 years	10.00%	12
5 years	3.33%	4
5 years or more	33.33%	40
TOTAL		120

### Q13 Did you have a online account prior to downloading the smartphone app/s?

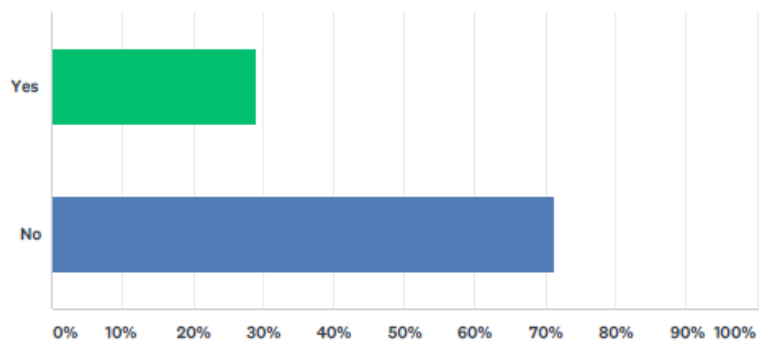
Answered: 121 Skipped: 334



ANSWER CHOICES	RESPONSES	
Yes	39.67%	48
No	60.33%	73
TOTAL		121

### Q14 Do you think you have won more money than what you have bet since using the app/s

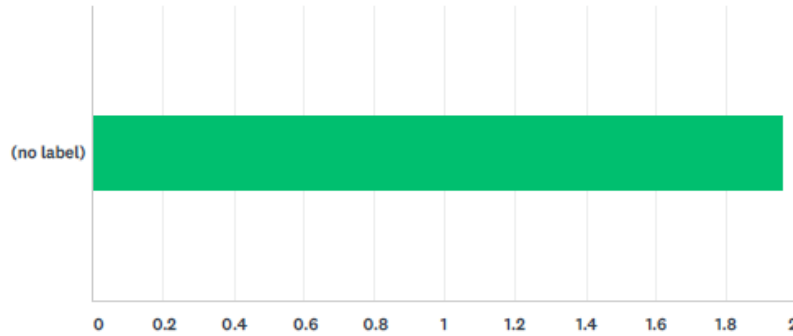
Answered: 121 Skipped: 334



ANSWER CHOICES	RESPONSES	
Yes	28.93%	35
No	71.07%	86
TOTAL		121

### Q15 My betting app is of good quality and is fit for purpose.

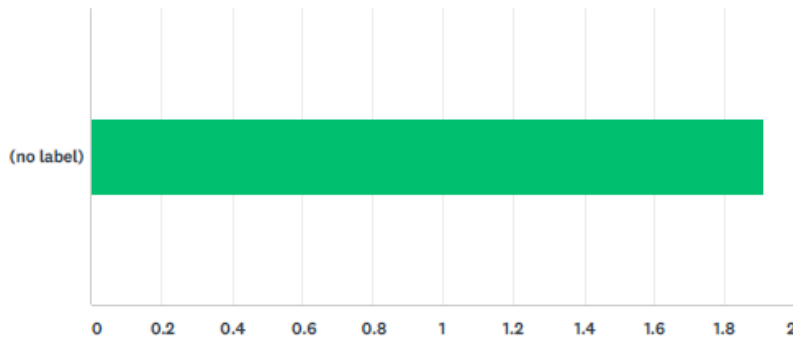
Answered: 121 Skipped: 334



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	21.49% 26	61.98% 75	15.70% 19	0.83% 1	0.00% 0	121	1.96

### Q16 The app is reliable when making bets and I rarely have any trouble with it.

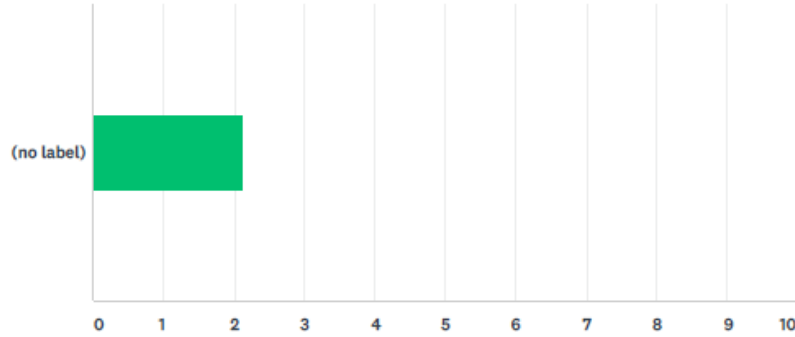
Answered: 121 Skipped: 334



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	26.45% 32	58.68% 71	12.40% 15	2.48% 3	0.00% 0	121	1.91

**Q17 I feel my personal details and payment details are safe and secure on the app.**

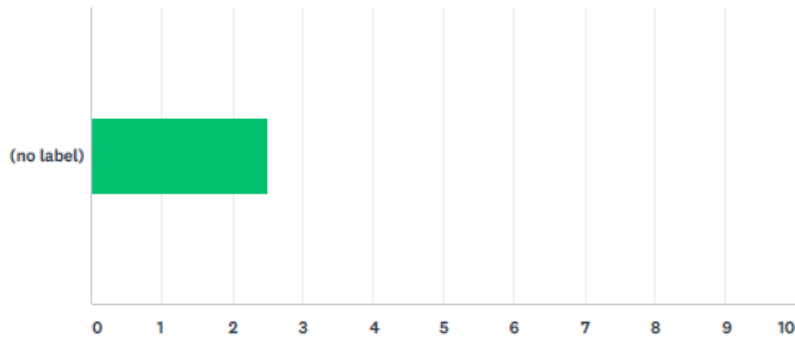
Answered: 121 Skipped: 334



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	12.40%	64.46%	22.31%	0.83%	0.00%	121	2.12
	15	78	27	1	0		

**Q18 The app performance is as expected and sometimes even exceeds my expectations.**

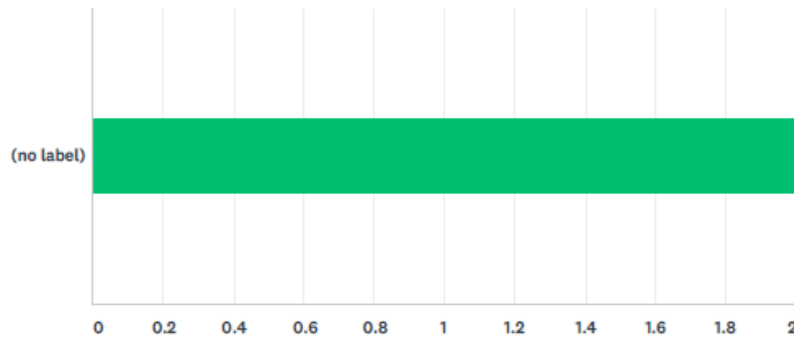
Answered: 121 Skipped: 334



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	2.48%	50.41%	42.98%	4.13%	0.00%	121	2.49
	3	61	52	5	0		

Q19 The app is very quick and there are odds updates in seconds.

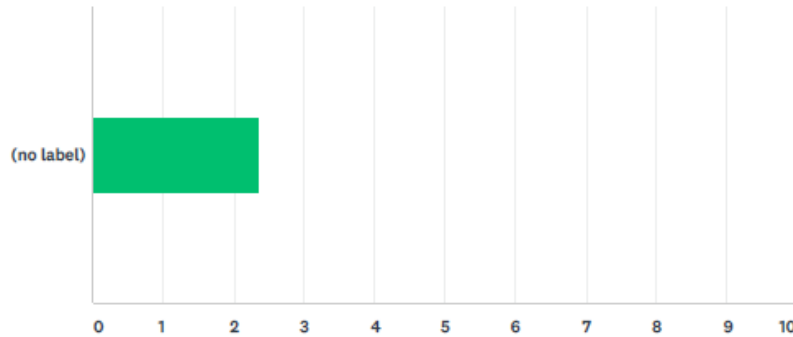
Answered: 121 Skipped: 334



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	24.79% 30	54.55% 66	16.53% 20	4.13% 5	0.00% 0	121	2.00

Q20 The odds are competitive and offer value for the risk in most circumstances.

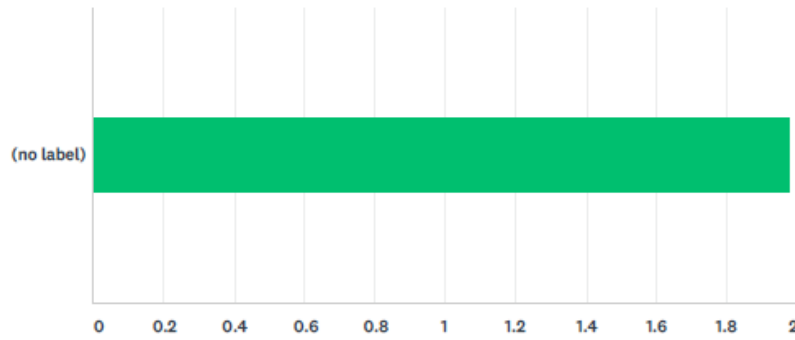
Answered: 121 Skipped: 334



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	6.61% 8	55.37% 67	33.88% 41	2.48% 3	1.65% 2	121	2.37

Q21 The app doesn't take up too much of my time to use its services.

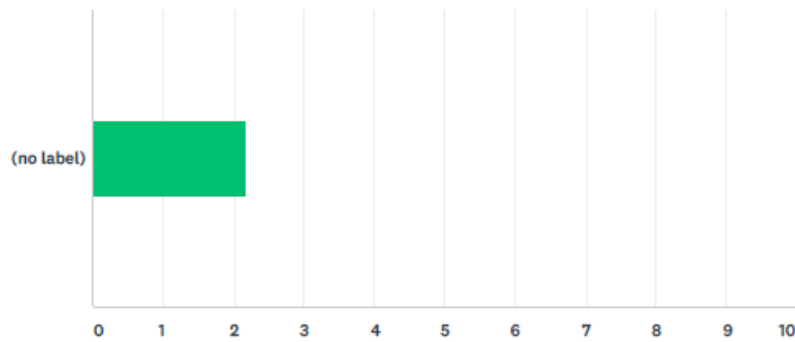
Answered: 121 Skipped: 334



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	16.53% 20	70.25% 85	12.40% 15	0.83% 1	0.00% 0	121	1.98

Q22 The effort to find information and bet details on sporting events are easy to access on the app.

Answered: 121 Skipped: 334

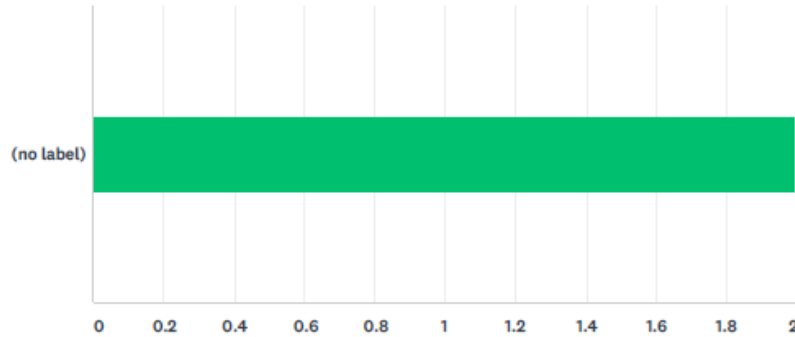


	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	10.74% 13	64.46% 78	20.66% 25	4.13% 5	0.00% 0	121	2.18



**Q23 The app offers a cash out function on some bets which can be valuable and reduce the risk of losing money.**

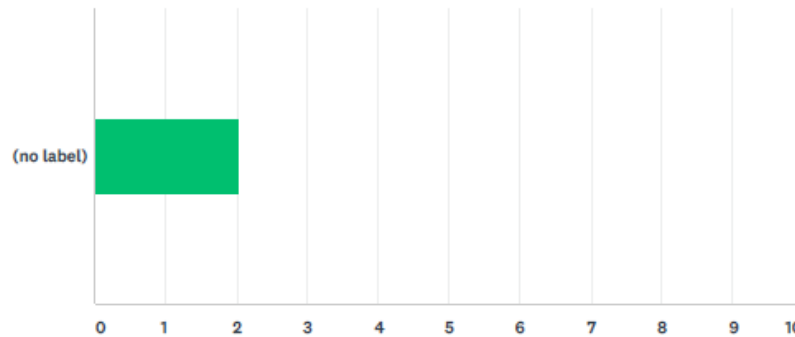
Answered: 121 Skipped: 334



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	23.97% 29	56.20% 68	17.36% 21	1.65% 2	0.83% 1	121	1.99

**Q24 I feel the app has improved over time and is getting better and easier to use.**

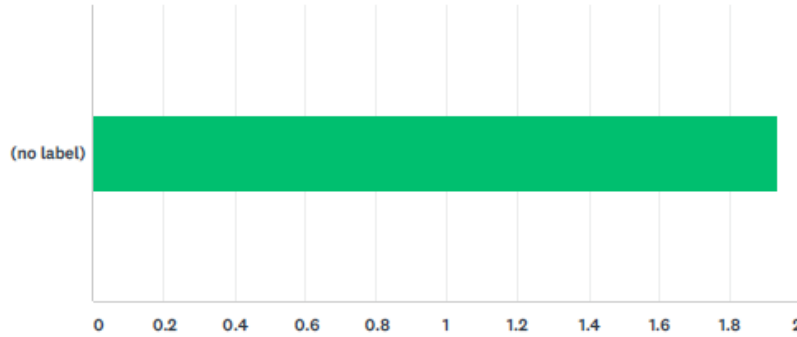
Answered: 121 Skipped: 334



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	18.18% 22	61.16% 74	19.83% 24	0.83% 1	0.00% 0	121	2.03

Q25 I don't have to contact the bookmaker at all as the app and the information provided is straight forward and well displayed.

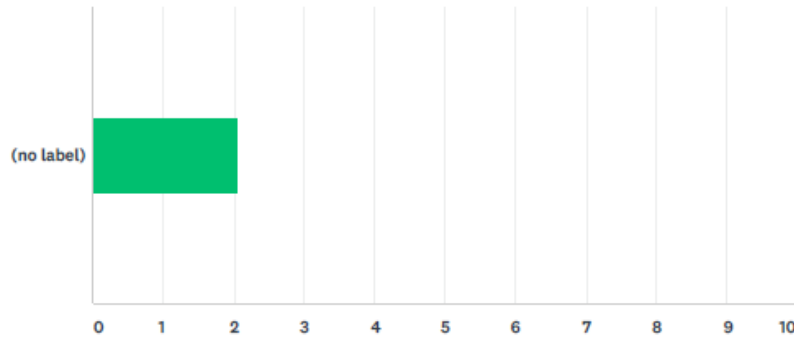
Answered: 121 Skipped: 334



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	24.79% 30	62.81% 76	7.44% 9	4.96% 6	0.00% 0	121	1.93

Q26 The convenience of the app and the speed of its navigation allows me to make bets quickly and capitalise on opportunities.

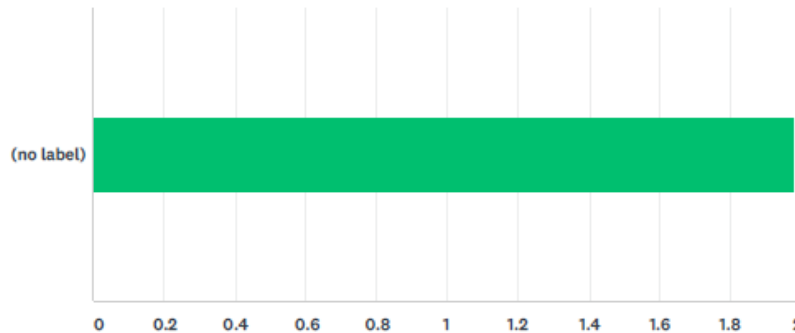
Answered: 121 Skipped: 334



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	16.53% 20	62.81% 76	20.66% 25	0.00% 0	0.00% 0	121	2.04

**Q27 Using the app is hassle-free. I use it for enjoyment and to win money.**

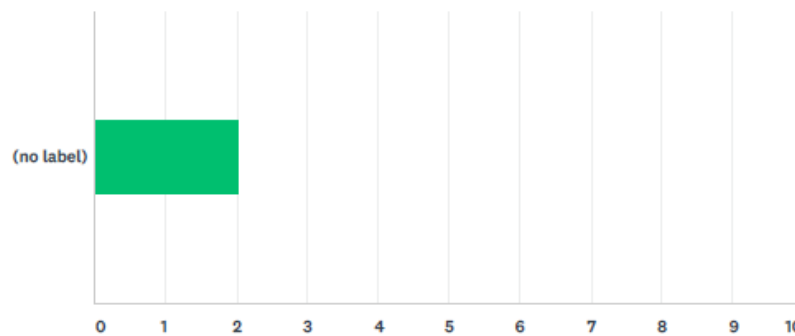
Answered: 121 Skipped: 334



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	19.01%	64.46%	15.70%	0.83%	0.00%	121	1.98
	23	78	19	1	0		

**Q28 The app allows me to easily customize my bets and create unique accumulators, doubles, trebles etc. to increase the odds to win more money.**

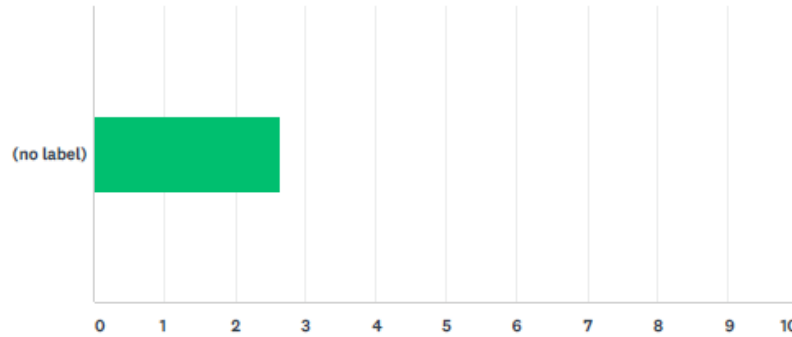
Answered: 121 Skipped: 334



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	21.49%	57.85%	16.53%	4.13%	0.00%	121	2.03
	26	70	20	5	0		

**Q29 I can contact the bookmakers to request odds on the possible outcome of events that I think may happen.**

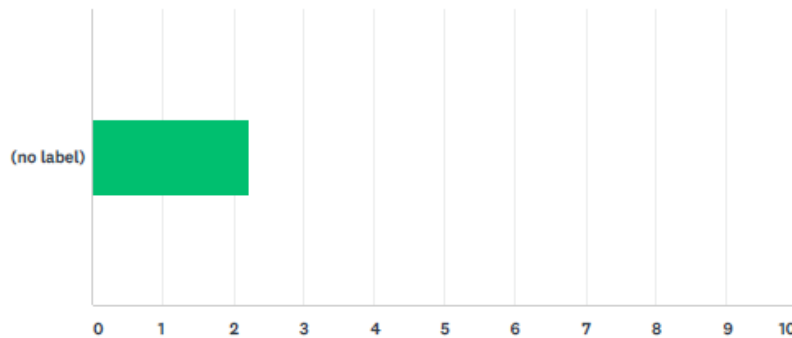
Answered: 121 Skipped: 334



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	5.79%	38.84%	44.63%	7.44%	3.31%	121	2.64
	7	47	54	9	4		

**Q30 The app allows me to decide the preferable outcome on sporting events and provides me with numerous options to consider.**

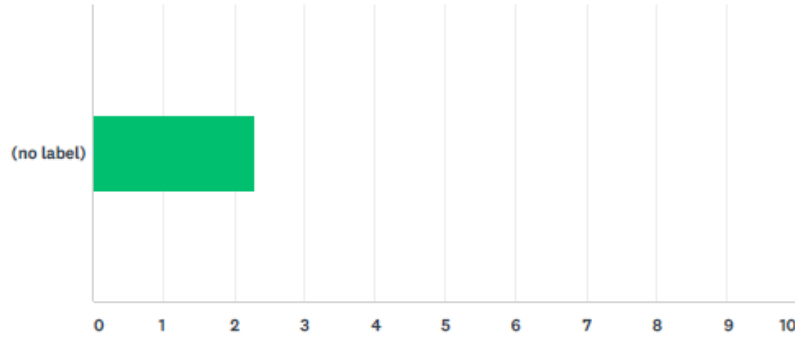
Answered: 121 Skipped: 334



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	11.57%	57.85%	28.93%	1.65%	0.00%	121	2.21
	14	70	35	2	0		

**Q31 The app doesn't prompt me to bet but simply gives me access when I wish to make a bet.**

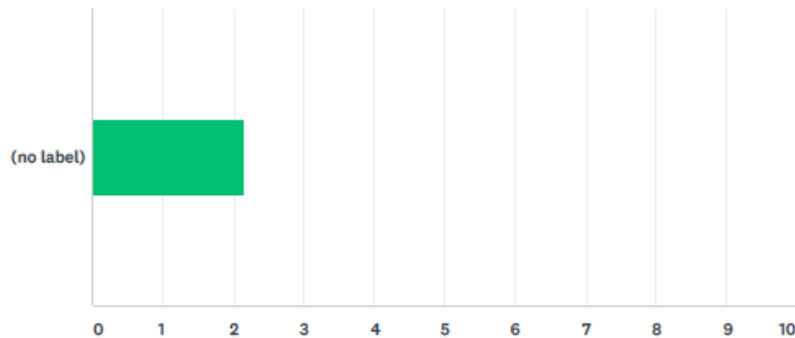
Answered: 121 Skipped: 334



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	16.53%	56.20%	12.40%	13.22%	1.65%	121	2.27
	20	68	15	16	2		

**Q32 I enjoy betting with this company and they are my preferable brand of bookmakers.**

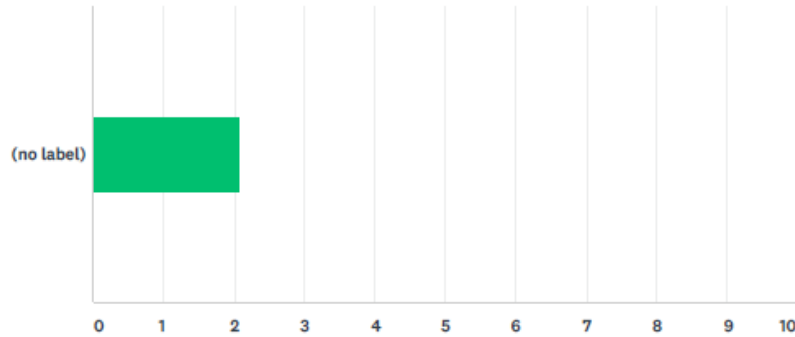
Answered: 121 Skipped: 334



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	15.70%	54.55%	28.93%	0.00%	0.83%	121	2.16
	19	66	35	0	1		

### Q33 I feel that the overall customer experience of using the app is good and worth my while

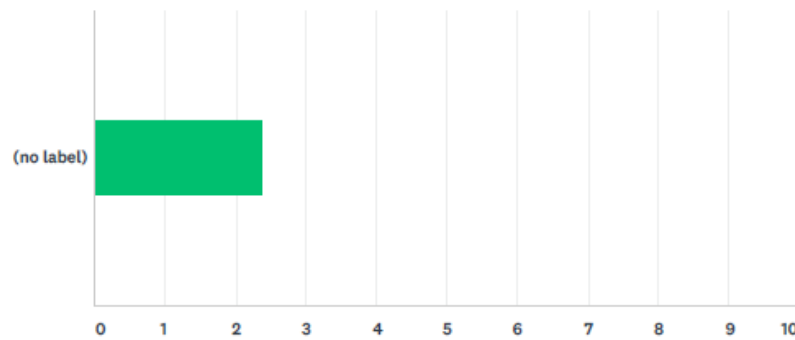
Answered: 121 Skipped: 334



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	13.22%	67.77%	17.36%	0.83%	0.83%	121	2.08
	16	82	21	1	1		

### Q34 I'm loyal to this bookmaker as the app does all I require of it.

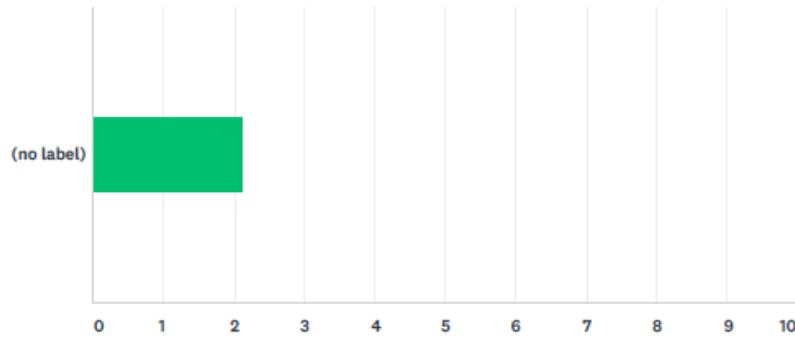
Answered: 121 Skipped: 334



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	10.74%	52.07%	26.45%	9.09%	1.65%	121	2.39
	13	63	32	11	2		

Q35 The bookmaker app is a leading app in the market and I feel it is professionally put-together. There is no need for me to change apps and use a different company.

Answered: 121 Skipped: 334

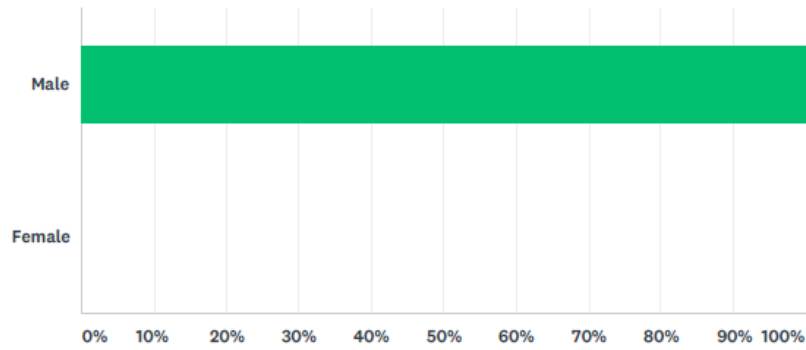


	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	19.83% 24	52.89% 64	23.14% 28	3.31% 4	0.83% 1	121	2.12

### 7.3 Appendix 3 – Targeted Demographics Survey Results

#### Q1 Are you male or female?

Answered: 96 Skipped: 0

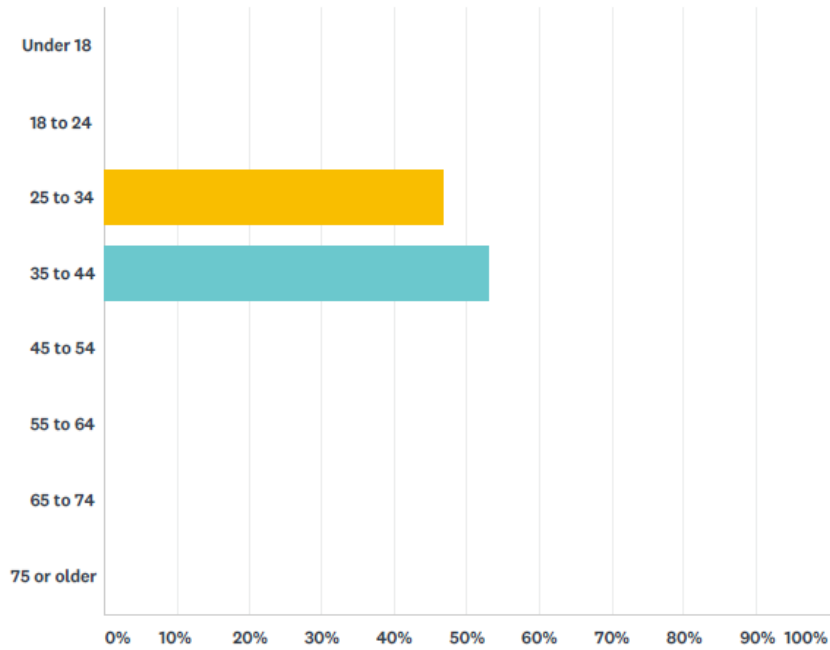


ANSWER CHOICES	RESPONSES	
Male	100.00%	96
Female	0.00%	0
TOTAL		96



## Q2 What is your age?

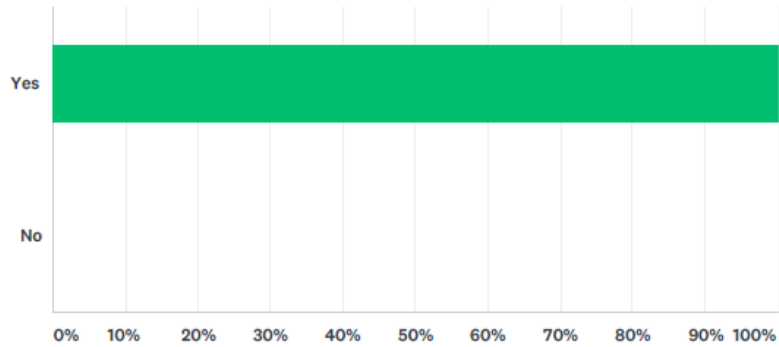
Answered: 96 Skipped: 0



ANSWER CHOICES	RESPONSES
Under 18	0.00% 0
18 to 24	0.00% 0
25 to 34	46.88% 45
35 to 44	53.13% 51
45 to 54	0.00% 0
55 to 64	0.00% 0
65 to 74	0.00% 0
75 or older	0.00% 0
<b>TOTAL</b>	<b>96</b>

### Q3 Do you own a Smartphone?

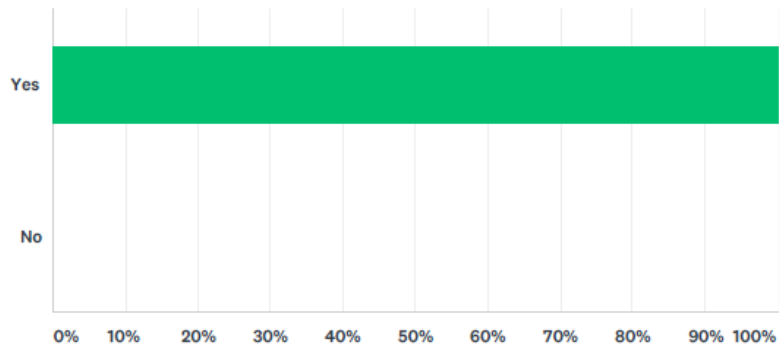
Answered: 96 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	100.00%	96
No	0.00%	0
<b>TOTAL</b>		<b>96</b>

### Q4 Do you have a sports gambling smartphone app on your smartphone i.e Paddy Power, Bet365, Ladbrokes, Boyle Sports, Coral, Bet Fair etc?

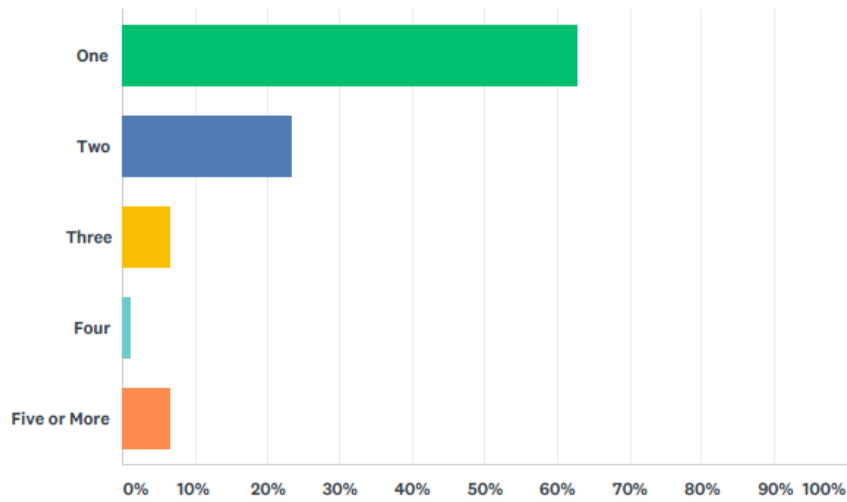
Answered: 96 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	100.00%	96
No	0.00%	0
<b>TOTAL</b>		<b>96</b>

## Q5 How many bookmakers do you have an online account with?

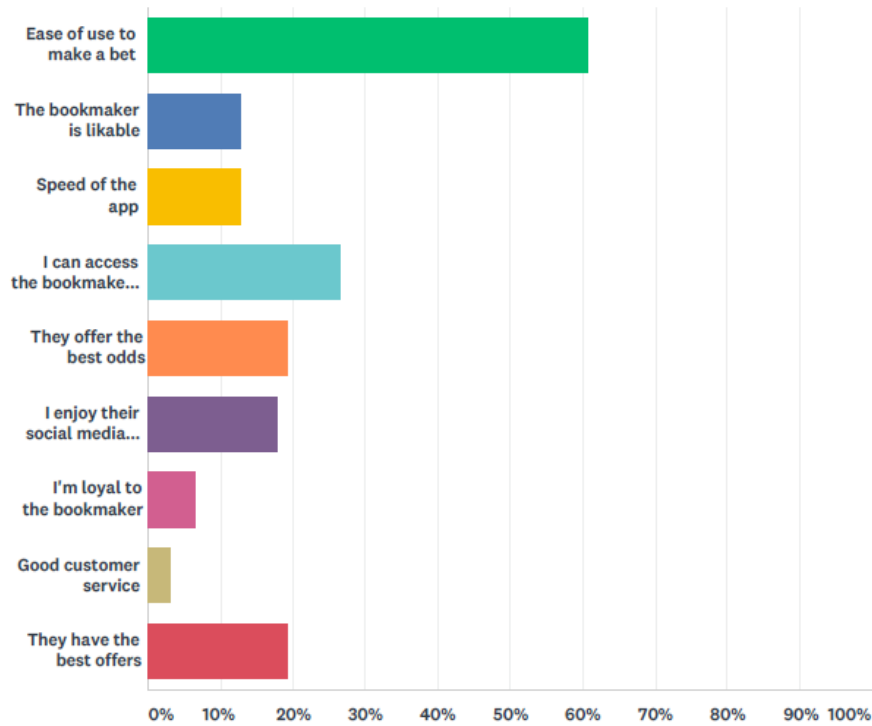
Answered: 94 Skipped: 2



ANSWER CHOICES	RESPONSES	
One	62.77%	59
Two	23.40%	22
Three	6.38%	6
Four	1.06%	1
Five or More	6.38%	6
<b>TOTAL</b>		<b>94</b>

## Q6 What made you choose the bookmaker/s app to use for your bets? (Select all that apply)

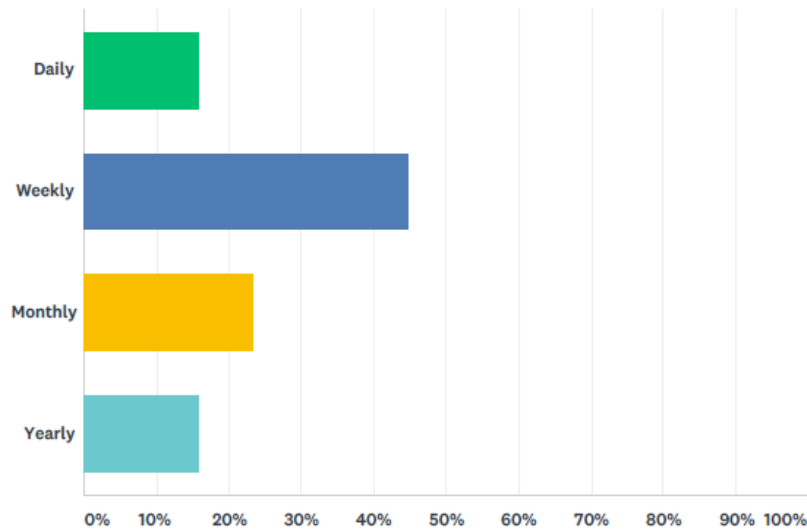
Answered: 94 Skipped: 2



ANSWER CHOICES	RESPONSES	
Ease of use to make a bet	60.64%	57
The bookmaker is likable	12.77%	12
Speed of the app	12.77%	12
I can access the bookmaker shops locally if required	26.60%	25
They offer the best odds	19.15%	18
I enjoy their social media content	18.09%	17
I'm loyal to the bookmaker	6.38%	6
Good customer service	3.19%	3
They have the best offers	19.15%	18
Total Respondents: 94		

### Q7 How often do you use the app/s?

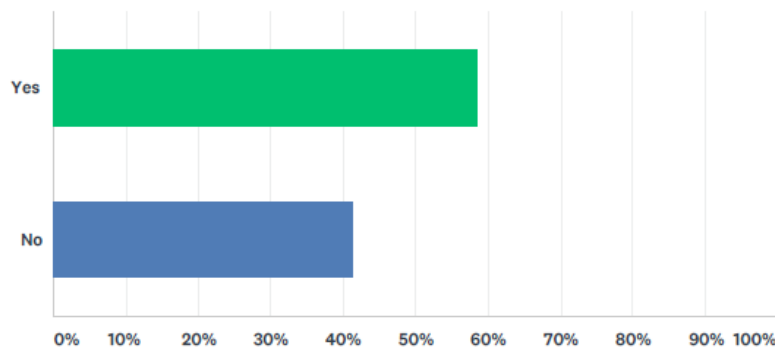
Answered: 94 Skipped: 2



ANSWER CHOICES	RESPONSES	
Daily	15.96%	15
Weekly	44.68%	42
Monthly	23.40%	22
Yearly	15.96%	15
<b>TOTAL</b>		<b>94</b>

### Q8 Do you follow the bookmaker/s on your social media account/s?

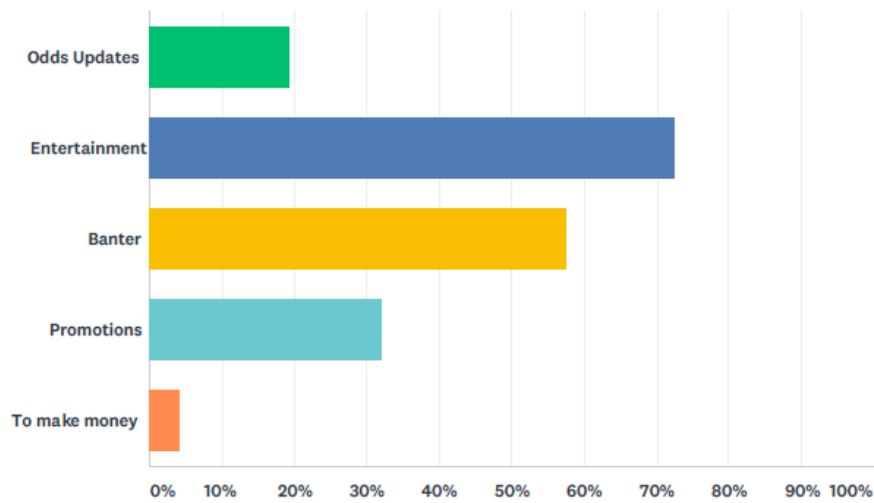
Answered: 94 Skipped: 2



ANSWER CHOICES	RESPONSES	
Yes	58.51%	55
No	41.49%	39
<b>TOTAL</b>		<b>94</b>

### Q9 Why do you follow them on social media? (Select all that apply)

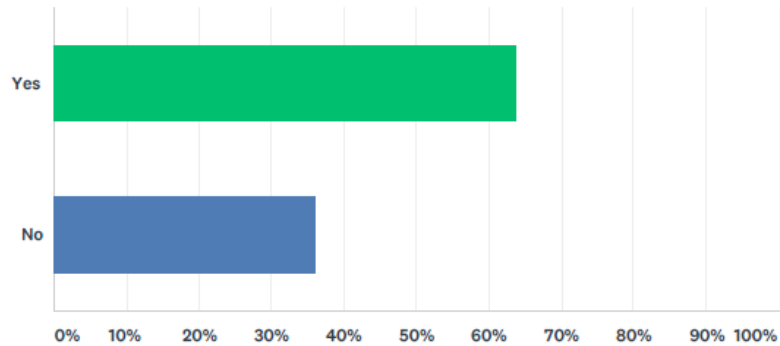
Answered: 47 Skipped: 49



ANSWER CHOICES	RESPONSES	
Odds Updates	19.15%	9
Entertainment	72.34%	34
Banter	57.45%	27
Promotions	31.91%	15
To make money	4.26%	2
Total Respondents: 47		

Q10 Do you feel that bookmakers should engage and entertain their followers on social media as well as offer the best odds on events?

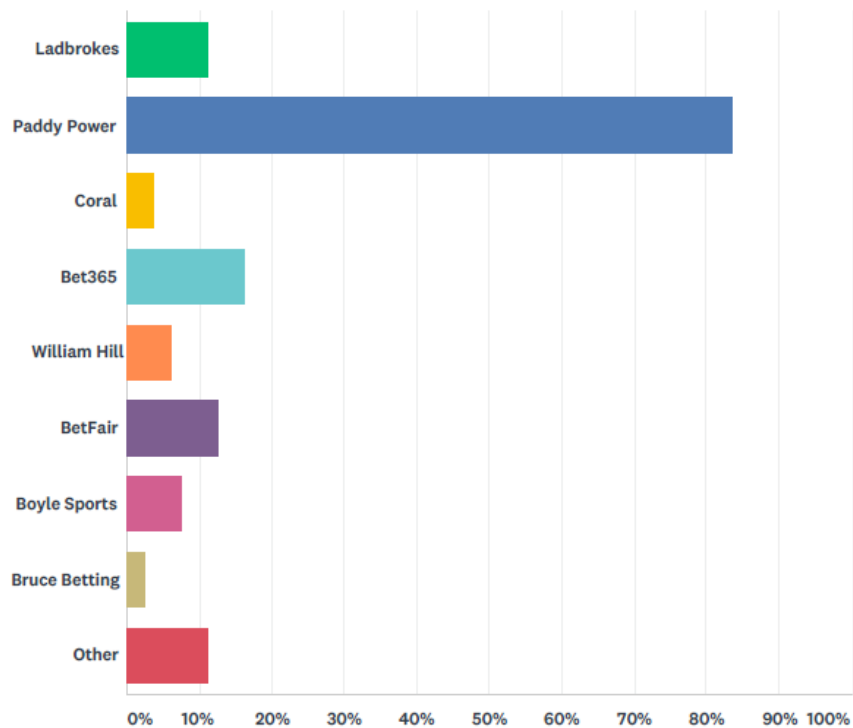
Answered: 80 Skipped: 16



ANSWER CHOICES	RESPONSES	
Yes	63.75%	51
No	36.25%	29
TOTAL		80

## Q11 Who do you have an online account with? (Select all that apply)

Answered: 80 Skipped: 16

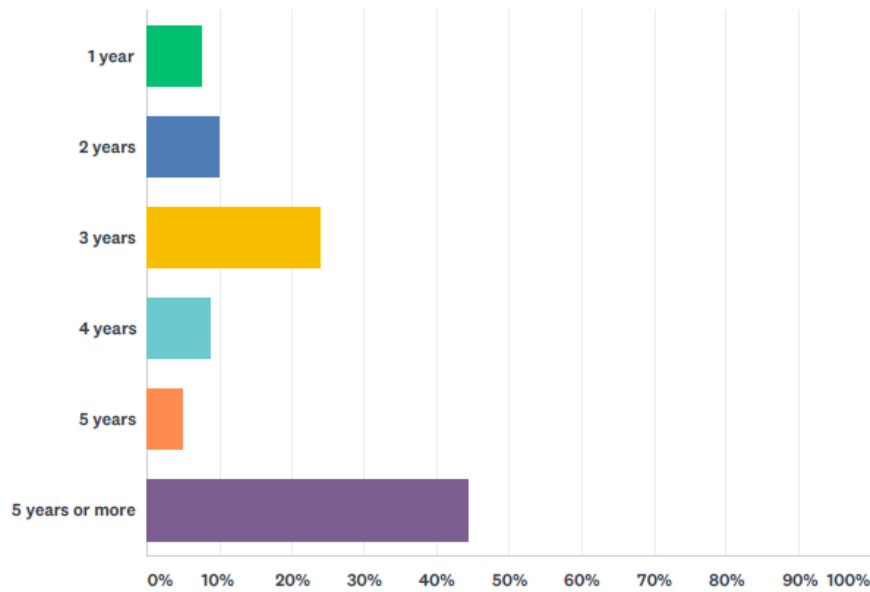


ANSWER CHOICES	RESPONSES
Ladbrokes	11.25% 9
Paddy Power	83.75% 67
Coral	3.75% 3
Bet365	16.25% 13
William Hill	6.25% 5
BetFair	12.50% 10
Boyle Sports	7.50% 6
Bruce Betting	2.50% 2
Other	11.25% 9
Total Respondents: 80	



## Q12 How long have you been using gambling smartphone apps?

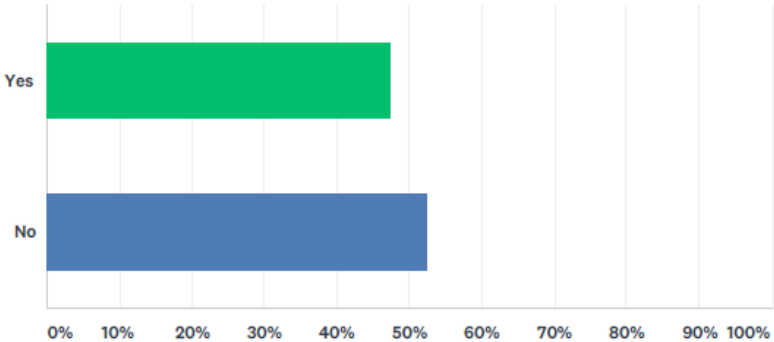
Answered: 79 Skipped: 17



ANSWER CHOICES	RESPONSES	
1 year	7.59%	6
2 years	10.13%	8
3 years	24.05%	19
4 years	8.86%	7
5 years	5.06%	4
5 years or more	44.30%	35
<b>TOTAL</b>		<b>79</b>

### Q13 Did you have a online account prior to downloading the smartphone app/s?

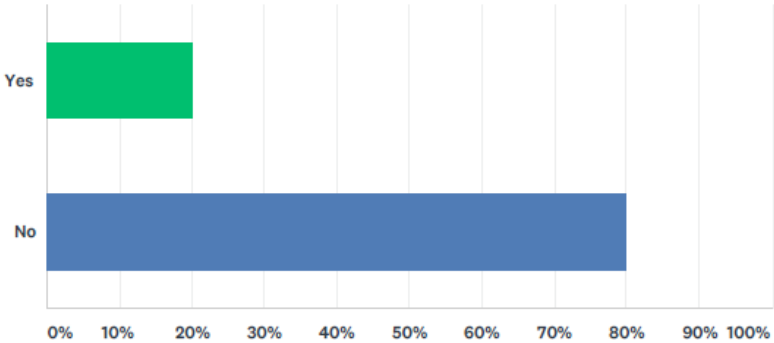
Answered: 80 Skipped: 16



ANSWER CHOICES	RESPONSES	
Yes	47.50%	38
No	52.50%	42
<b>TOTAL</b>		<b>80</b>

### Q14 Do you think you have won more money than what you have bet since using the app/s

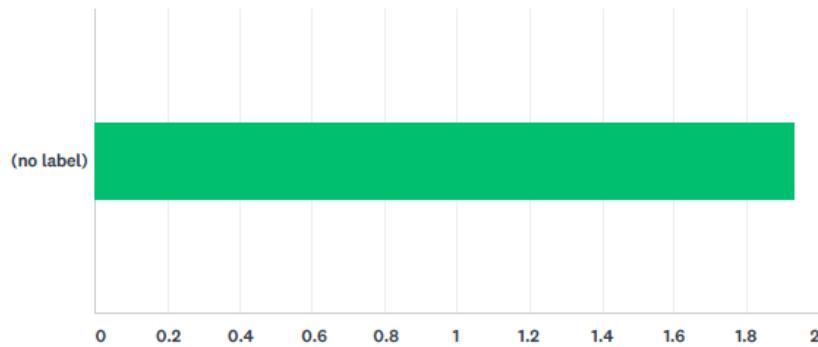
Answered: 80 Skipped: 16



ANSWER CHOICES	RESPONSES	
Yes	20.00%	16
No	80.00%	64
<b>TOTAL</b>		<b>80</b>

### Q15 My betting app is of good quality and is fit for purpose.

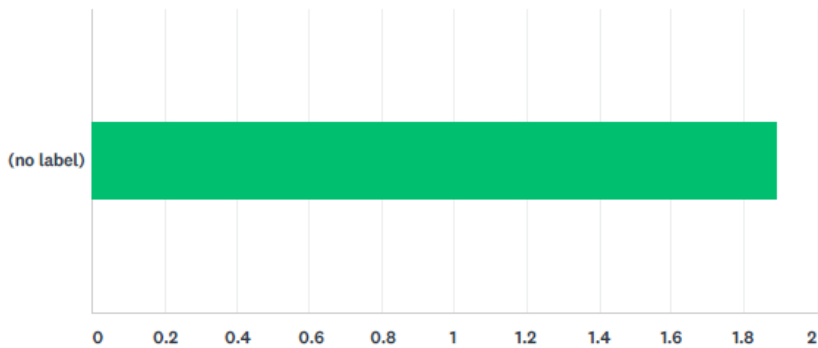
Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE		TOTAL	WEIGHTED AVERAGE
(no label)	21.25%	66.25%	11.25%	1.25%		0.00%	80	1.93
	17	53	9	1		0		

### Q16 The app is reliable when making bets and I rarely have any trouble with it.

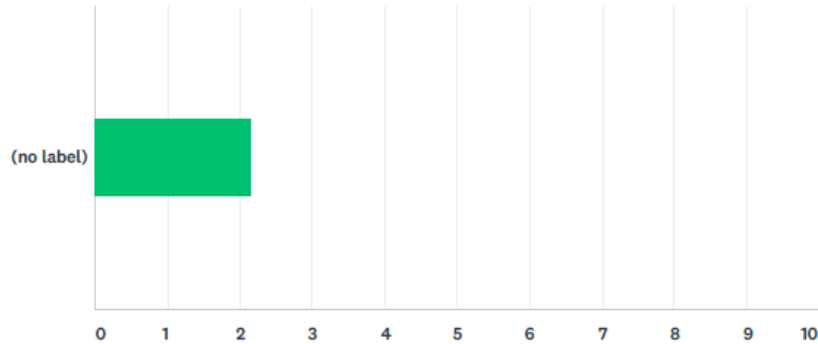
Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE		TOTAL	WEIGHTED AVERAGE
(no label)	26.25%	60.00%	12.50%	1.25%		0.00%	80	1.89
	21	48	10	1		0		

Q17 I feel my personal details and payment details are safe and secure on the app.

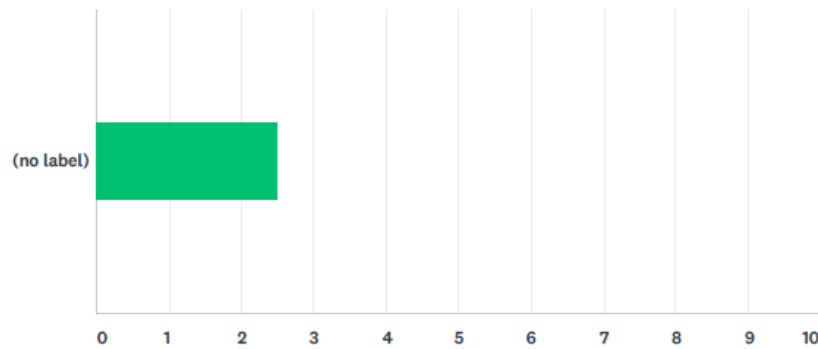
Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	10.00% 8	65.00% 52	25.00% 20	0.00% 0	0.00% 0	80	2.15

Q18 The app performance is as expected and sometimes even exceeds my expectations.

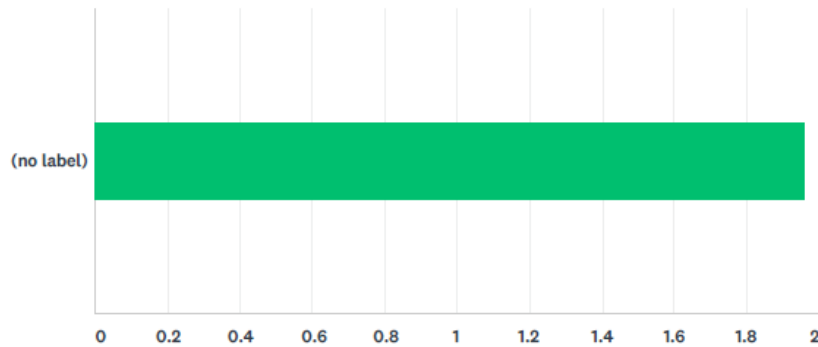
Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	0.00% 0	56.25% 45	38.75% 31	5.00% 4	0.00% 0	80	2.49

Q19 The app is very quick and there are odds updates in seconds.

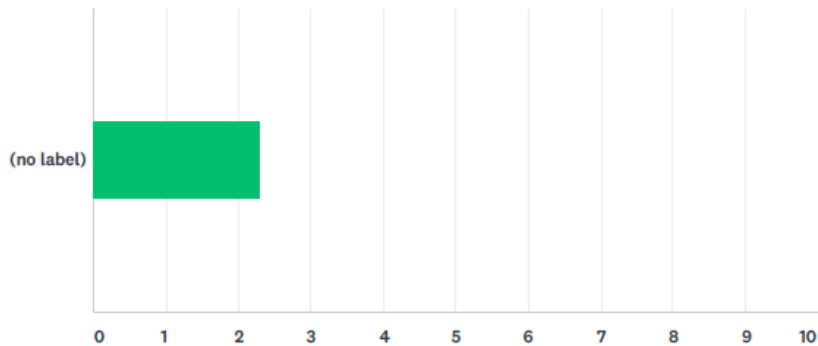
Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	23.75% 19	60.00% 48	12.50% 10	3.75% 3	0.00% 0	80	1.96

Q20 The odds are competitive and offer value for the risk in most circumstances.

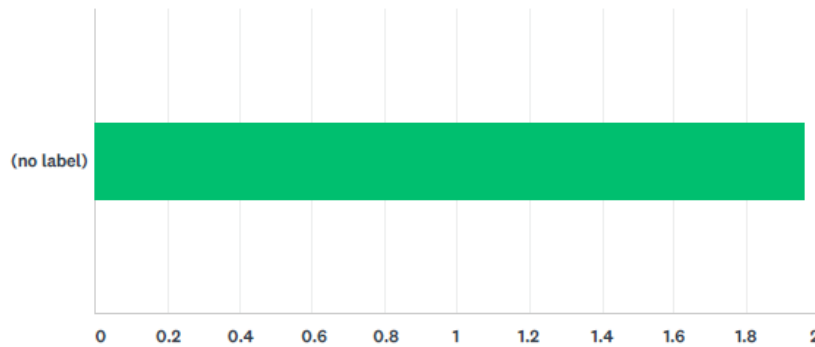
Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	5.00% 4	65.00% 52	26.25% 21	1.25% 1	2.50% 2	80	2.31

Q21 The app doesn't take up too much of my time to use its services.

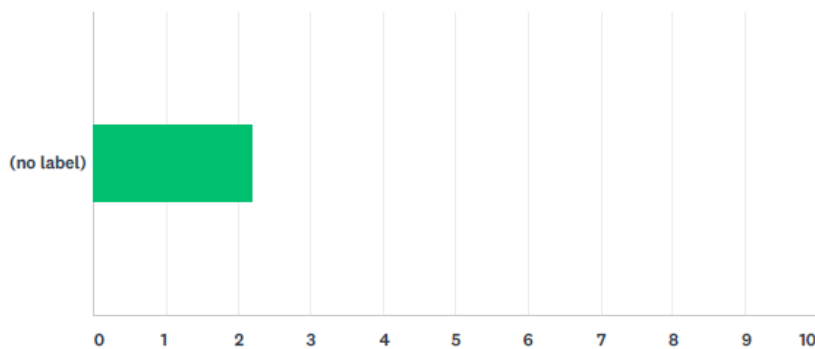
Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE		TOTAL	WEIGHTED AVERAGE
(no label)	16.25%	72.50%	10.00%	1.25%	0.00%		80	1.96
	13	58	8	1	0			

Q22 The effort to find information and bet details on sporting events are easy to access on the app.

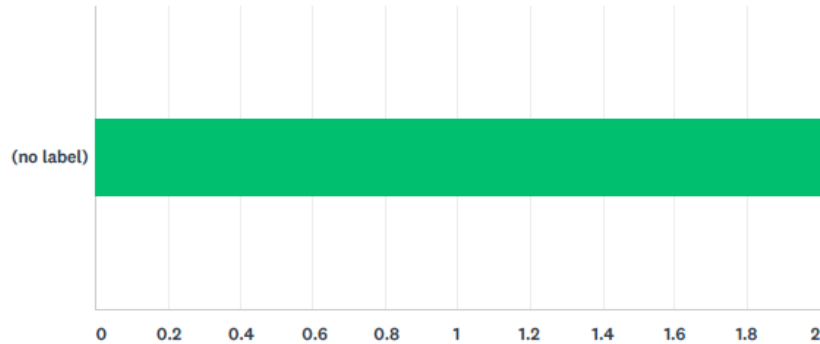
Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE		TOTAL	WEIGHTED AVERAGE
(no label)	10.00%	67.50%	16.25%	6.25%	0.00%		80	2.19
	8	54	13	5	0			

Q23 The app offers a cash out function on some bets which can be valuable and reduce the risk of losing money.

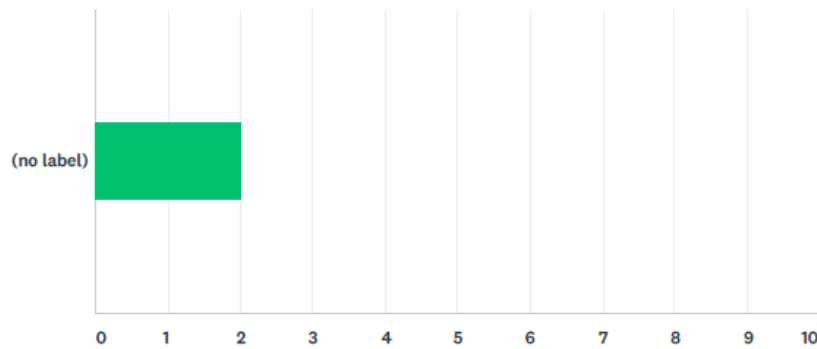
Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	22.50% 18	58.75% 47	16.25% 13	1.25% 1	1.25% 1	80	2.00

Q24 I feel the app has improved over time and is getting better and easier to use.

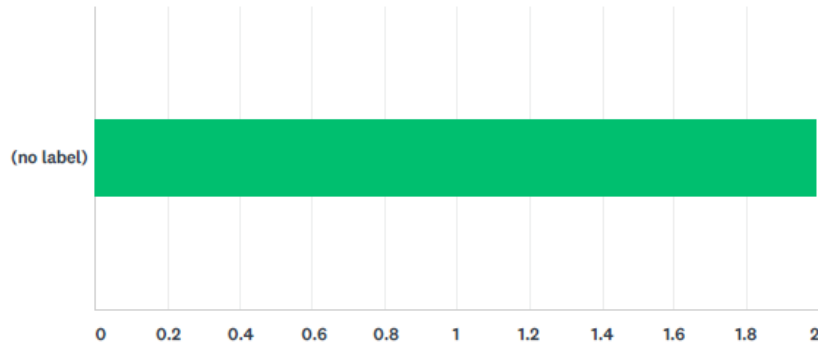
Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	17.50% 14	63.75% 51	18.75% 15	0.00% 0	0.00% 0	80	2.01

Q25 I don't have to contact the bookmaker at all as the app and the information provided is straight forward and well displayed.

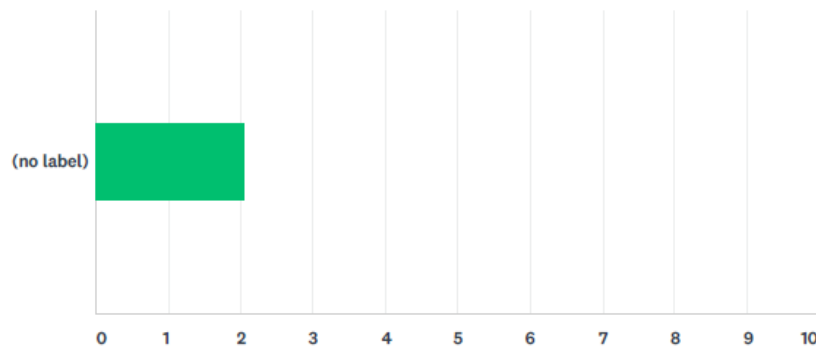
Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	22.50% 18	63.75% 51	6.25% 5	7.50% 6	0.00% 0	80	1.99

Q26 The convenience of the app and the speed of its navigation allows me to make bets quickly and capitalise on opportunities.

Answered: 80 Skipped: 16

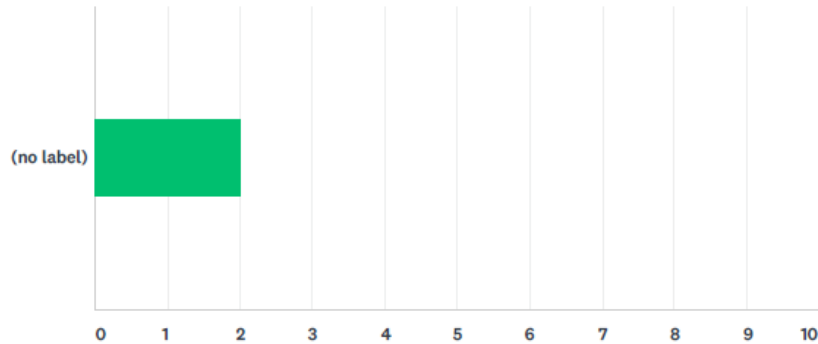


	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	15.00% 12	65.00% 52	20.00% 16	0.00% 0	0.00% 0	80	2.05



Q27 Using the app is hassle-free. I use it for enjoyment and to win money.

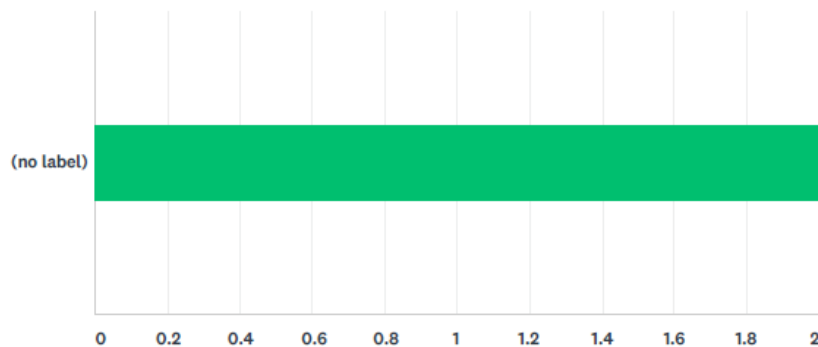
Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	17.50% 14	65.00% 52	16.25% 13	1.25% 1	0.00% 0	80	2.01

Q28 The app allows me to easily customize my bets and create unique accumulators, doubles, trebles etc. to increase the odds to win more money.

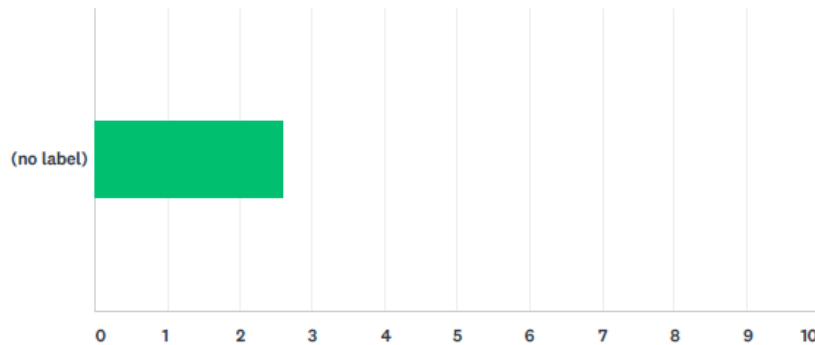
Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	23.75% 19	58.75% 47	11.25% 9	6.25% 5	0.00% 0	80	2.00

Q29 I can contact the bookmakers to request odds on the possible outcome of events that I think may happen.

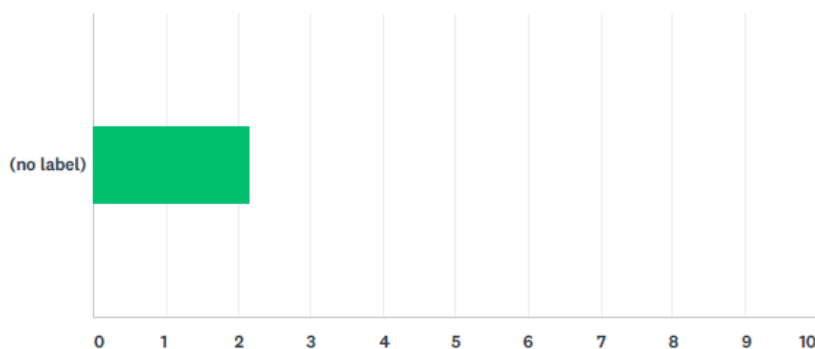
Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	6.25% 5	41.25% 33	42.50% 34	6.25% 5	3.75% 3	80	2.60

Q30 The app allows me to decide the preferable outcome on sporting events and provides me with numerous options to consider.

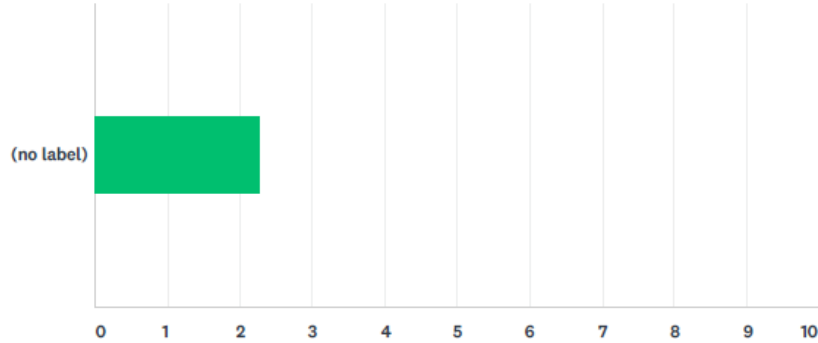
Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	13.75% 11	58.75% 47	26.25% 21	1.25% 1	0.00% 0	80	2.15

Q31 The app doesn't prompt me to bet but simply gives me access when I wish to make a bet.

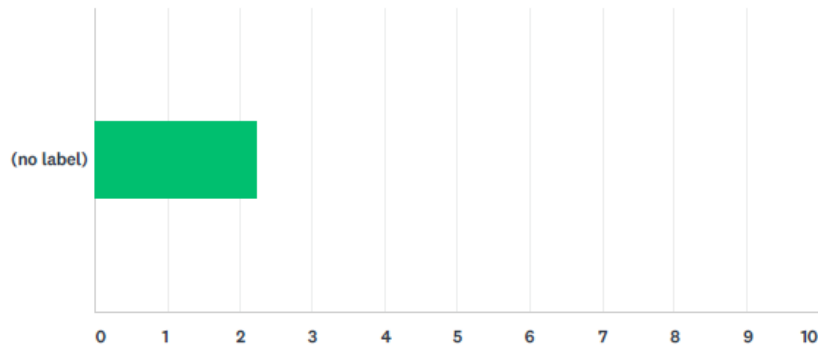
Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	13.75% 11	61.25% 49	10.00% 8	13.75% 11	1.25% 1	80	2.27

Q32 I enjoy betting with this company and they are my preferable brand of bookmakers.

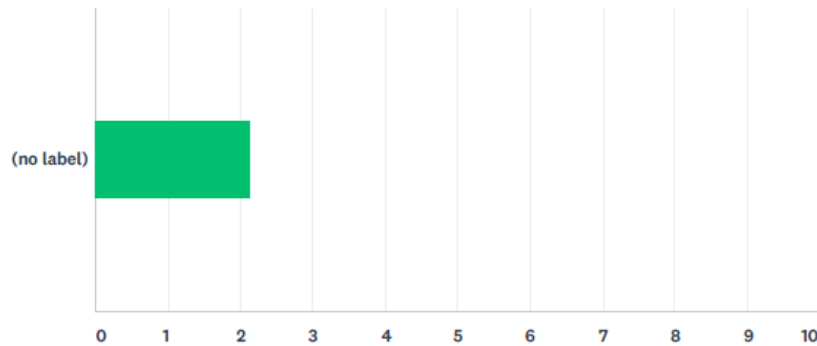
Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	12.50% 10	55.00% 44	31.25% 25	0.00% 0	1.25% 1	80	2.23

### Q33 I feel that the overall customer experience of using the app is good and worth my while

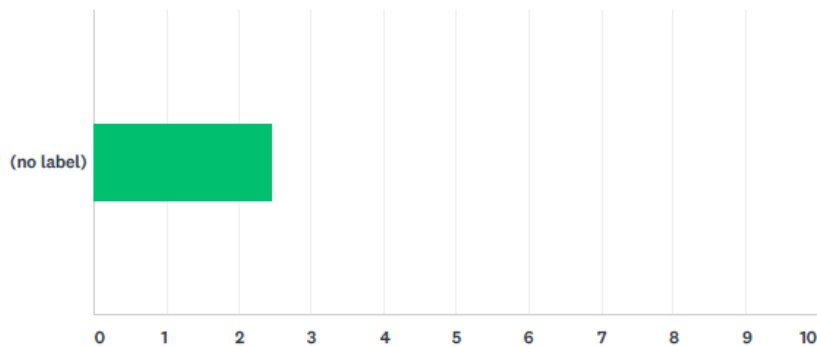
Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	11.25%	67.50%	20.00%	0.00%		1.25%	
	9	54	16	0		1	80
							2.13

### Q34 I'm loyal to this bookmaker as the app does all I require of it.

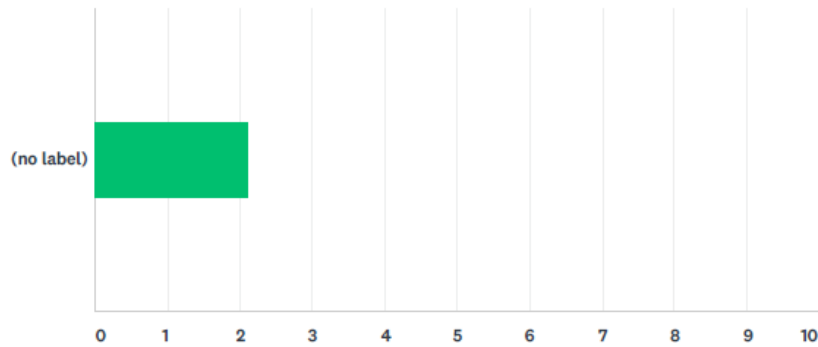
Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	8.75%	52.50%	27.50%	8.75%		2.50%	
	7	42	22	7		2	80
							2.44

Q35 The bookmaker app is a leading app in the market and I feel it is professionally put-together. There is no need for me to change apps and use a different company.

Answered: 80 Skipped: 16



	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	TOTAL	WEIGHTED AVERAGE
(no label)	20.00% 16	53.75% 43	22.50% 18	2.50% 2	1.25% 1	80	2.11

