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The growth of sports betting in Malawi: corporate strategies, public space and public health

Abstract

Objectives

Gambling is increasingly positioned as a public health issue, with links to a wide range of harms for individuals, communities and societies. Malawi has experienced a rapid rise in the availability of high street and online sports betting services, situated in a context of extreme inequality and poverty. We aim to document the strategies through which a leading sports betting firm have established a market worth MK2.1bn, in order to inform future initiatives to mitigate gambling-related harm.

Study Design

A case study of strategies deployed by a leading firm to grow a sports betting market in Malawi.

Methods

We undertook a qualitative media analysis of articles from 6 major Malawian news outlets and combined this with photographic evidence relating to company advertising and presence in Malawian public space. Data were analysed thematically and triangulated to generate a typology of corporate strategies.

Results

We collected 39 articles and 15 photographs. After we screened the articles, we analysed 27 and identified 7 corporate strategies: adopt a mobile network franchise model; use media coverage; purchase high-visibility advertising; sponsor locally; build association with (European) football; appeal to aspects of hegemonic masculinity; construct narratives of individual and collective benefit.

Conclusion

Malawi has been exposed to a sophisticated set of corporate strategies aimed at growing a sports betting market. These strategies have been successful, and it is likely that a range of foreseeable gambling-related harms are affecting Malawi. We offer suggestions for how policy makers and public health professionals might respond.

Key Words: Malawi, Gambling, Public Health, Sports, Inequalities

Word Count 3,625

Introduction

In recent times, gambling has been framed as a public health issue, with researchers demonstrating the contribution it makes to a broad range of social harms, extending beyond the individuals who engage in disordered gambling.¹ Evidence from high-income countries suggests that disordered gambling contributes significant costs to public services,² negatively affects the families and communities of such gamblers,^{3, 4} and is linked with poor mental health⁵ and suicide.^{6, 7} This growing body of evidence has led researchers from high-income countries to call for regulation of the gambling industry that treats gambling as a public health issue, rather than an individual pathology.^{1, 8, 9} By contrast, in low- and middle-income countries there is considerably less information and research about the scale of the gambling industry's activities and the impacts these activities are having in host communities.

In the context of the increased scrutiny gambling is receiving in higher-income countries, some researchers have argued that the industry is shifting its attentions to territories with less stringent regulations in much the way the tobacco industry did when European and North American governments introduced tobacco control.¹⁰ One trend noted by analysts and academics is the growth of gambling services in sub-Saharan Africa (SSA).^{11, 12} While this growth includes the full range of gambling formats, including casinos, lotteries and online services, one of the most visible forms has been sports betting.¹³ Sports betting in South and East Africa has an established history. During the colonial period, for example, football 'pools' were popular.¹⁴ The contemporary sports betting market is diverse, but European football is often the focus.¹⁵ This reflects a trend that has been characterised as the 'gamblification of sports',¹⁶ which some have suggested has been particularly powerful in European football,¹⁷ and represents an intensification of the long-standing relationship between sporting evenings and betting practices.

While research on sports betting in the SSA region is limited, the corpus is growing and frequently highlights football as a focal market. In Uganda, David Mwesigwa describes how young people living in Lira bet on football matches in an attempt to supplement their income, and are also drawn into the activity by the social interaction it provides.¹⁸ Akanle and Fageyinbo argue that setting up a football betting business in Nigeria requires little more than an internet-capable device.¹⁹ In a survey of 300 Nigerian bettors, they also noted that respondents were predominantly young men who placed bets daily or at least four times per week, and frequently using unemployment benefits to fund their activities.²⁰ More recently, Chiweshe has documented the rise of football betting in Zimbabwe, highlighting how bettors have come to position their practice as a livelihood, fed by stories of large, life-changing wins.²¹ In Ghana, Tagoe and colleagues also found that a love of football was often reported as a motivator of youth betting and framed as a way of obtaining money.²²

Ahaibwe and colleagues examined the socio-economic impacts of gambling in Kampala, where ~20% of adults have gambled on sports in last year, with male participation reaching 10 times the level among women. They go on to highlight that 51.6% of gamblers reported that their betting caused them to spend less on household necessities, 28.4% linked their betting with domestic violence and 3.4% reported selling household assets due to gambling.

Among the poorest quintile in their sample, the average spend on gambling was 17.4% of household income. Finally, their report suggests that 26.9% of sampled gamblers bet daily, and 40.5% weekly.²³ While such spending trends are likely to be detrimental to health, few studies have sought to document or measure them. In South Africa, surveys of gambling practices have been carried out in both rural and urban settings and linked to health outcomes.^{24, 25} One survey of urban-dwelling South Africans found that, as in western literature, those with comorbidities such as depression, anxiety, alcohol and substance use are more at risk of developing problematic gambling practices. Importantly, as with evidence in Uganda and Nigeria, gambling was most common among young males from low-income backgrounds.²⁵

The available research evidence suggests that sports betting in SSA is likely to be contributing to a range of negative outcomes with serious impacts on public health. Specifically, by reducing household income in contexts of poverty, gambling is likely to affect nutrition, education, access to healthcare and treatment, contribute to or exacerbate mental health problems and place strain on important social relationships. Recognising this, some governments in the region have already acted. Ugandan authorities have ceased issuing new licences and signalled an intention not to renew existing licences.²⁶ The Kenyan government has also suspended licences until tax debts are paid.²⁷ Despite these moves, gambling firms continue to expand their operations in the region, with a leading accountancy firm valuing the African market in 2016 at \$18bn and 'growing rapidly'.²⁸

Sports betting in Malawi is dominated by a single company. The company, Premier Bet, operates in 17 territories across SSA, launched in Blantyre, Malawi in 2015 and currently enjoys a near monopoly on the licensed sports betting market, accounting for 99% of market share in 2018.²⁹ Media coverage in 2015 suggested that the company initially opened seven stores in Malawi,³⁰ and the Malawi Gaming Board (MGB) report that in 2018 it operated 319 outlets.³¹ This rapid growth in operations over just 4 years suggests that sports betting has become popular and profitable in Malawi. Market figures published by the MGB support this observation. In the financial year 2016/17 the gross revenue from the sports betting market was MK933.3 million and rose to MK2.1 billion in 2017/18,²⁹ which is almost double the size of the national mental health budget (approximately MK1.2 billion) for 2017/18.^{32, 33}

In this paper we aim to provide an account of the growth of sports betting in Malawi that focuses on strategies Premier Bet has used to make itself visible in public spaces and grow a sizeable market at a rapid pace. We situated this enquiry within the growing literature in public health which argues that more attention needs to be paid to the 'commercial determinants of health'³⁴ especially in relation to sport.³⁵ Specifically, by documenting the commercial strategies underpinning the rapid growth in Malawi's sports betting market, we aim to offer evidence to inform governments across SSA as they explore options for regulating the industry and controlling the spread of gambling-related harms in their jurisdictions. We also intend for this evidence to inform public health approaches that seek to limit and mitigate gambling-related harms.

Methods

Our account draws on data gathered through three methods. Firstly, we undertook a qualitative media analysis³⁶ of articles relating to gambling and betting published on the websites of six leading Malawian news outlets (Table 1). We identified articles by searching the websites with a standardised set of terms (betting, bet, gambling, gamble). Searches were carried out in July 2019 and were not limited by date. Identified articles were saved in PDF format and read by researchers [XX, XX, XX] to ensure that their content related to sports betting in Malawi. Articles that described other forms of betting (e.g. casino, lottery) and which made no reference to sports betting were excluded. PDFs were imported into NVivo 12 and analysed thematically³⁷ by one researcher [XX].

Secondly, we triangulated³⁸ data from our media analysis with photographic data, which we analysed using principles from visual sociology.³⁹ Using an adapted form of transect walk,⁴⁰ two researchers [XX, XX] produced photographs of advertisements for sports betting services placed in urban public spaces in Lilongwe and Blantyre (Limbe). These photographs were imported into Nvivo 12 and a hermeneutic analysis was conducted which explored the possible meanings of the advert in relation to the context in which it was sited.⁴¹ During the triangulation process, we supplemented media and visual data with internet and archival searches to enrich and enhance our account of the strategies through which the focal company sought to establish its market. As part of these searches, we made use of the Internet Archive (<https://archive.org>) to access website content from the past.

Finally, we used our triangulated data set to categorise the strategies used by the company to establish interest in their products and to grow their market. We applied a Bourdieusian definition of strategy during this final stage of analysis: 'lines of action which social agents continually construct through practice.'⁴² The advantage of this definition is that by focusing on practices, it encompasses both intentional and unintentional elements of actions, thus going beyond more business-oriented definitions which focus on consciously constructed lines of action.

Results

Our searches returned a total of 39 articles from the six news outlets. Of these, we excluded 12 and analysed 27. We generated 15 images from two urban locations in Lilongwe and Blantyre (Limbe). After triangulation, we identified seven strategies through which Premier Bet has sought to establish demand for its product. Table 2 lists these seven strategies and the techniques through which they have been pursued. We now elaborate these strategies with examples from our dataset.

Adopt a mobile network franchise model

Premier Bet's visibility in Malawian public space owes a great deal to the model of vending the company employs. While shops in permanent buildings are part of the model, it is most common to see Premier Bet's services offered in umbrella stands and road-side kiosks, such as depicted in Figure 1. Agents are given a mobile betting terminal, which combines cellular-

enabled, battery-powered, tablet and receipt-printing technologies to allow the agent to operate without mains power. This approach to vending mimics the model of vending used by mobile phone companies to sell airtime, sim cards and money transfer services, thus providing a familiar social and technological interaction for customers. Moreover, it is extremely cheap and easy to scale up, when compared to shop-based models.

The company also actively advertises for agents and franchisees in public space. These adverts construct working with Premier Bet as empowering – ‘become your own boss’ – and presented using cartoon avatars widely used in contemporary digital cultures (Figure 2). Other adverts target investors, encouraging them to earn 7% commission on all Premier Bet sales (Figure 3).

Use media coverage

Since Premier Bet launched in 2015, Malawian newsprint and online journalists have regularly covered the company’s activities and customer-related stories. Stories about customers who have won a significant sum through betting with the company provide recurring opportunities to increase their visibility via press events. Media coverage suggests that representatives from Premier Bet are on hand to pose for photos at these events, often with large cheques being given to winners.⁴³

Company representatives also use the opportunity to provide journalists with quotations for publication in coverage of winners’ events. The quotations offered tend to refer to the winner and their fortune, but also give the company opportunities to get other messages out. For example, at one such winners’ event in 2018, a representative of Premier Bet told journalists that ‘we are calling on interested businesspersons who run entertainment places to enter into franchise arrangements with us.’⁴⁴

Purchase high-visibility advertising

Adverts such as those depicted in Figures 2 and 3 are placed to maximise exposure. Figure 2, for example, is placed on an arterial route in Lilongwe which carries a great deal of traffic, and the same is true of Figure 3, placed in Limbe, Blantyre. As well as targeting busy spaces, Premier Bet have also bought a large billboard outside of Malawi’s national stadium, which hosts high-profile football matches and is by far the most modern and impressive sports venue in the country (Figure 4). Placing such a large advert in this space enables the company to advertise to significant numbers of football fans each time the stadium hosts a match.

Sponsor locally

While Premier Bet does not run regular books on local Malawian markets, with representatives citing Premier Bet’s lack of expertise and ties to London,⁴⁵ it does sponsor local sports clubs and events. In 2016, the company struck a sponsorship deal with the TNM Super League team Wizards FC, in which it reportedly undertook to cover ‘all operational costs’.⁴⁶ Away from football, sponsorship was also provided for the ‘Premier Bet Seniors Golf Championship at Country Club Limbe.’⁴⁷

As described above, these sponsorship deals provided further opportunities for media events at which Premier Bet could encourage Malawians to use their services. Coverage of the Wizards sponsorship deal was accompanied by an image of company and club representatives sat beneath a banner carrying the phrase 'join the game',⁴⁶ with a representative offering a quotation to the press explaining that 'we felt we could use the club as a vehicle to market our brand.'⁴⁸ The golf event, also hosted a banner inviting viewers to 'become an agent or franchisee', with another company representative telling the press that 'I would also like to take this opportunity to inform the public that we have obtained a national lottery licence and we will have launch of our countrywide initiative in March 2019.'⁴⁷

Build association with (European) football

A key strategy used by Premier Bet to encourage Malawians to take up its services is to associate closely with football and, specifically, European Football. The very name of the company *Premier Bet* echoes the name of the English *Premier League*, and the logo contains a sphere that evokes thoughts of a football. These associations appear to be part of a very deliberate approach. As a company representative stated at a media event launching their flagship store in Blantyre, 'Malawians are very keen on football and we believe they will also be keen to bet on European football.'⁴⁵

Even when launching non-football related products, Premier Bet representatives have framed them with reference to football. One article in our data set reported that 'they have decided to introduce the Premier Lotto 5/90 game in order to continue giving chances to Malawians of getting money as the English Premier League and other soccer competitions which most customers were following and betting are winding up their season.'⁴⁹

Appeal to aspects of hegemonic masculinity

Quotations supplied to the media by Premier Bet representatives appeal to aspects of hegemonic forms of masculinity,⁵⁰ specifically those that value skill, competition and triumph over others. We captured data that framed sports betting as a marker of individual skill and knowledge of sports. As one Premier Bet representative stated to the press, when commenting on a winner's success, 'It's not luck but he used his skill and knowledge of football to ensure he got all the outcomes.'⁵¹ Through such discourse, Premier Bet appear to be encouraging potential customers to view sports betting as a forum in which they can distinguish themselves.

Building on the discourse of skill, the roadside kiosk depicted in Figure 1 is adorned with the challenge 'can your selection beat Mr. Predictor?' This challenge is given by a silhouetted man who appears to be wearing a commentator's headset, evoking football expertise, and giving an encouraging thumbs-up. Through the alignment of skill, competition and the invitation to 'beat Mr. Predictor', Premier Bet draw on components of hegemonic masculine discourse to encourage participation in their games.

Construct narratives of individual and collective benefit

A central strategy employed by Premier Bet in their pursuit of a Malawian market is the propagation of narratives which emphasise the benefits of their business for their customers, employees and wider Malawian society. Throughout our dataset, Premier Bet representatives are reported to position the company's services as 'life changing' and a source of income. For example:

Like we have been repeatedly saying our main target is to help in changing lives of many people. It is our expectation that through this new game we have created another good way which will help people to be making money in an easy and simple way because many Malawians have no reliable means of getting money but through our betting games...⁴⁹

This narrative also appears in much of the reporting on customers who have had big wins, with one winner suggesting, 'This money will change my life. I plan to go back to school and continue with my education in construction; this is something I'll remember for the rest of my life.'⁴³

Alongside winners' stories emphasising personal gains, Premier Bet representatives have also constructed narratives describing wider benefits. Specifically, quotations to press have emphasised the contributions the company is making to Malawian society, with one article reporting that '[company representative] said betting.... is also benefiting the economy through the revenue collected by government as well as employment opportunities created.'⁵² Such narratives have also been echoed in media reports by representatives of the Malawi Gaming Board.⁴⁵

Discussion

The evidence we have gathered from media coverage and photographs of Premier Bet's presence in Malawian public space points to a company with a sophisticated set of strategies for establishing a customer base in the country. The mobile network-based infrastructure through which they operate is cheap and easy to attract staff to with promises of commission and independence; media coverage provides the company with opportunities to address a wide audience (both customers and investors) with their messaging; high visibility adverts establish presence in busy and symbolically useful locations (e.g. national stadium); passion for football provides a ready-made cultural space for the company to attach itself to, especially through alignment with European competitions; masculine norms of skill, competition and prowess are harnessed; and sports betting is framed as an activity through which to further both individual and collective interests. Through these approaches, Premier Bet established and grew a market now worth in excess of MK2.1bn.²⁹

The strategies we have documented suggest that the company is seeking to build a broad market, and to encourage a perception of sports betting as a 'reliable' means for 'getting money'. This messages echoes bettor perceptions reported in studies in Zimbabwe and Ghana.^{21, 22} Such messaging is misleading at best and has significant potential to lead to

reduction of household spending power. Malawi is among the lowest income countries in the world,⁵³ has high levels of malnutrition,⁵⁴ faces significant burdens of disease⁵⁵ and low levels of primary school completion.⁵⁶ Given evidence linking income,^{57, 58} nutrition,⁵⁹ healthcare access⁶⁰ and schooling⁶¹ to health outcomes, extractions of wealth in the context of Malawian poverty and inequality are public health issues. For, reduction in household cash directly limits access food, healthcare and schooling.

Further concern about the impact sports betting is having in Malawi relates to the capacity of country's health services to care for those affected by disordered gambling. The population has access to just 0.01 psychiatrists and 0.22 psychiatric nurses per 100,000 people, specialist mental health services are underdeveloped and under-resourced, and public health facilities do not have the training or staff to manage disordered gambling.⁶² Given the strong evidence linking problem gambling and adverse mental health outcomes in the global north,⁶³ it is likely that Malawi will witness similar trends, placing additional burden on health and mental health services.

Given the significant body of research that has documented the negative consequences of gambling corporations' commercial activities on public health in high-income countries,^{1, 63} it is reasonable to assume that industry growth in SSA will not come without social costs. In the context of high levels of poverty, as in the case of Malawi, it is possible that the social price paid as a result of this growth may indeed be higher than in high-income countries. Whether or not this turns out to be the case, research from high-income countries presents a clear warning for governments across SSA: the gambling industry brings with it a series of foreseeable harms.

While more work is needed to inform robust health-focussed responses to these foreseeable harms, our work points to a number of potential options for policy makers and public health practitioners in Malawi (and potentially, the SSA region). Firstly, the rapid rise in street outlets could be managed by limiting gambling activities to permanent structures. Policy makers could consider legislation to curtail public advertisements and prohibit sponsorship deals between gambling companies and Malawian organisations, events and services. Public health interventions could target media outlets to encourage greater critical reflection on their role in the corporate strategies of betting firms. Public health professionals could also work with (male) sports fans to decouple consumption of football and gambling, with specific attempts to counter appeals to masculinity by emphasising alternative values such as protection, provision and strength. Finally, we suggest that policy makers and public health practitioners need to work together to counter the message that gambling is likely to provide life-changing wealth or a source of income. Both messages are misleading at best and likely irresponsible.

The work we have presented is, to our knowledge, the first study of sports betting and its health implications for Malawi. By undertaking a systematic search of Malawian media coverage and collecting photographic evidence, we have documented the visible strategies employed by Premier Bet to grow a sports betting market. More research is needed to establish the prevalence of gambling activities and harms in Malawi, to document the experiences of those affected by gambling-related harms, and to explore strategies used by companies such as Premier Bet which are not visible in public spaces and media. Such work

would enable government and public health practitioners to pursue an evidence-based approach to regulation and intervention to limit the foreseeable harms documented by researchers from high-income countries.

Conclusions

In this paper, we have offered an account of the strategies that a leading sports betting company has employed to grow a market for their products in Malawi. Using media coverage and photographic evidence, we have documented these strategies and explored their potential links to negative impacts on public health. Our work can be used to inform regulatory and harm-mitigating initiatives that seek to redress what we consider to be the foreseeable harms that will accompany the expansion of gambling companies across the SSA region.

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