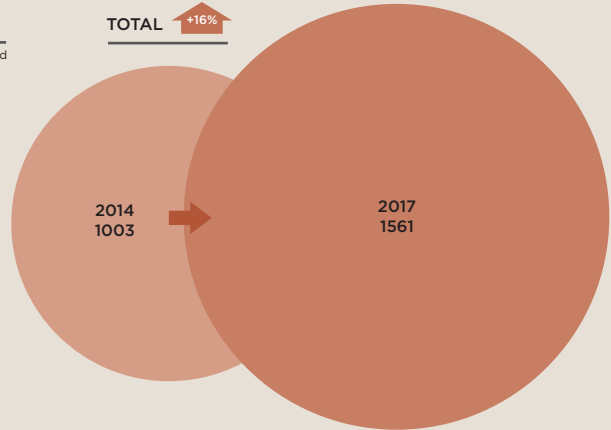
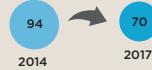
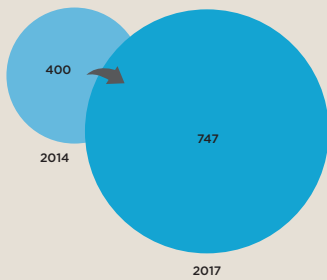
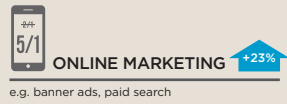
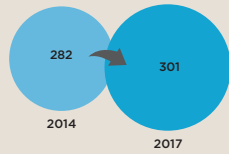
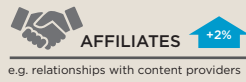
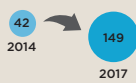
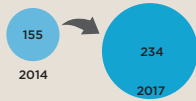


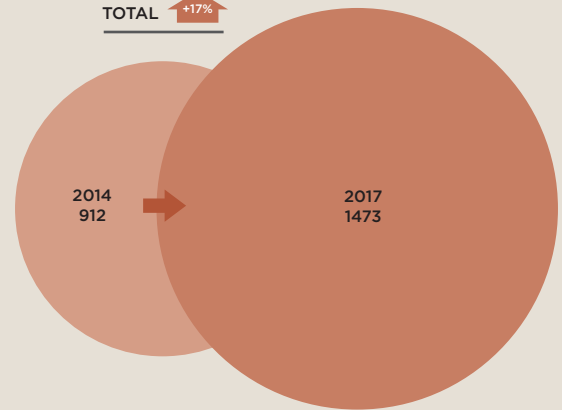
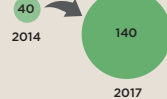
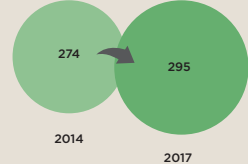
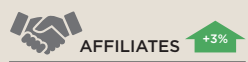
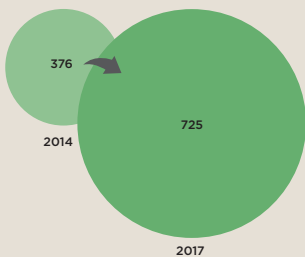
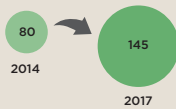
GAMBLING ADVERTISING AND MARKETING SPEND IN GREAT BRITAIN, 2014-17

GB TOTAL



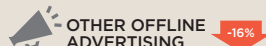
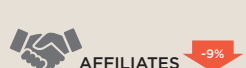
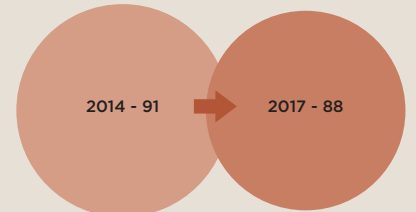
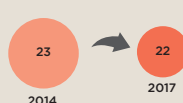
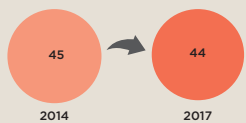
- RP estimates that the GB gambling industry spent £1.5bn on advertising and marketing in 2017, which has grown at 17% per year from 2014
- This includes c. £60m in sports sponsorship, much of which (in cost terms) is designed to appeal to a global audience of GB sports (especially the English Premier League)
- TV advertising has grown at 15% per year to become 16% of total spending mix

COMMERCIAL ONLINE (betting, casino games, bingo, poker)



- The GB commercial sector (ie, excluding lottery) represents 94% of total spend
- TV advertising is heavily polarised between intensive and expensive sports and cheaper but more frequent 'other slots' (daytime bingo, casino post 9pm)
- Social Media marketing has grown to become a material channel, while affiliate spend is now declining

LOTTERY



- The GB lottery sector (including Large Society Lotteries and their providers) represents 6% of estimated spend
- While TV mix is higher (50% vs. 13%), total estimated spend is less than a quarter of the commercial sector
- Lottery advertising and marketing spend is relatively static overall, with substantially all growth coming from the commercial sector