# GAMBLING MARKETING AND THE PREMIER LEAGUE: CONTINUED SATURATION AND FAILED SELF-REGULATION

The 3rd Annual Research Report into the Prevalence of Gambling Marketing during the Opening Weekend of the English Premier League.

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University of BRISTOL

Raffaello Rossi, Saeid Moradipour, Jamie Wheaton, Runze Lin and Maria Moxey

## DATA POLICY



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Beacon House, Queens Road, BS8 1QU

T / 0117 928 9000
raffaello.rossi@bristol.ac.uk
www.bristol.ac.uk

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## ABOUT THIS RESEARCH

This is the third in a series of reports exploring the prevalence of gambling marketing across televised football matches, sports news programming, radio and social media during the opening weekend of this season's Premier League. Following the same research methods as the last two years, this report highlights findings from four main areas of focus:

- **Live matches:** Premier League broadcasts (15 – 18 August 2025)
- **Sky Sports News:** Coverage on 16 August 2025 (7am –11pm)
- **TalkSport Radio:** Coverage on 16 August 2025 (6am – 9pm)
- **Social media:** Ads by the ten largest UK gambling brands on Facebook, Instagram and X (15 – 18 August 2025)

### FAILURES OF SELF-REGULATION

For the third consecutive year, our findings highlight the pervasiveness of gambling marketing in the Premier League. Across four platforms, 27,440 gambling messages were recorded during the 25/26 opening weekend - a slight fall from 29,415 in 24/25, but still far above the 10,999 in 23/24. The data point to a saturated advertising space, with operators increasingly competing for the limited spaces. We observed not only an increase in the number of brands, but also a rise of messages on other formats such as on the stadium structure itself. Similar to last year, a clear theme across platforms and marketing formats is the ineffectiveness of self-regulation, either because the rules are too weak by design, or because the industry has not followed its own commitments. The table below highlights six major regulatory failures.

**Failures of self-regulation**

| Policy | Intended aim | 2025 findings |
|---|---|---|
| **Sponsorship Code of Conduct (introduced in 2024)** | Limit overall gambling exposure to children and vulnerable groups | 27,440 messages, nearly 3x higher than 2023 |
| | Restrict sponsorship agreements to UK licensed operators only | 8.6% of TV ads and 12.1% on Sky Sports News promoted unlicensed operators |
| | Ensure substantial share of responsible gambling messages | Only 12.1% carried harm reduction messages (vs 20% target set by the gambling industry) |
| **Front-of-shirt ban (commencing 2026/27)** | Reduce exposure to gambling marketing by removing front- of-shirt sponsorships | Front-of-shirt accounts for only 9.6% of total exposure; ban will have limited effect. |
| **Whistle-to-Whistle Ban** | Reduce exposure to gambling marketing during live play. | 13,262 messages occurred during the restricted periods, rendering the policy ineffective. |
| **ASA/CAP oversight of social media ads** | Regulate social media gambling ads by all UK-licensed gambling operators | Loophole left 371 of 486 ads (76%) outside of remit – equal to around 33,800 ads a year escaping oversight. |

### RECOMMENDATIONS

**Given the continued pervasiveness of gambling marketing in the Premier League, and the persistent failure of self-regulation to reduce exposure, our recommendations reiterate those made last year. In particular, we call for tighter legislation that establishes comprehensive rules on gambling marketing, to reduce the visibility of gambling via sport.**

**Specifically, this includes:**

- **A Comprehensive "Whistle-to-Whistle" Ban:** Enforce a ban covering all forms of gambling marketing during sporting events, including commercials, kit sponsorship, pitchside hoardings, and associated media like social media and radio.
- **Mandated Responsible Gambling Messaging:** Require all gambling marketing to include clear messages about the harms of gambling, with legal standards for size, prominence, and duration.
- **Ban on Gambling Content Marketing:** Prohibit gambling content marketing that breaches advertising regulations and appeals to children, ensuring better protection for vulnerable audiences.
- **Ban unlicensed brands in sponsorship agreements:** Limit all sponsorship and marketing to UK-licensed operators. The Sponsorship Code of Conduct has failed to prevent unlicensed brands, showing the need for government action.

## HEADLINE FINDINGS

**27,440** TOTAL GAMBLING MESSAGES IDENTIFIED

A total of 27,440 messages were found across the four media channels during the opening weekend, showing the persistent and pervasive nature of gambling marketing in football.

**21,815** MESSAGES DURING SEVEN MATCHES

21,815 gambling messages were recorded on different formats including hoardings, stadium structure, and football shirts. On average, there were 12.6 gambling messages per minute.

**5,262** GAMBLING MESSAGES IN A SINGLE MATCH

The highest number of messages were found during the match between Wolverhampton and Manchester City. One-third of the live broadcast contained at least one gambling ad.

**2,412** MESSAGES BY UNLICENSED BRANDS

Across the live broadcasts and Sky Sports News, 8.8% of gambling messages came from 13 operators without a UK gambling licence.

### FINDINGS

**9.66%** FRONT-OF-SHIRT EXPOSURE

Gambling messages on the front-of-shirt accounted for only 9.66%, demonstrating the limited impact the incoming front-of-shirt ban will have on reducing exposure to gambling marketing.

**13,262** MESSAGES DURING WHISTLE-TO-WHISTLE BAN

Over 60% of messages recorded during the broadcasts, were recorded during the industry's "whistle-to-whistle" ban, highlighting the ineffectiveness of this self-regulation.

**34M** 34 MILLION VIEWS ON SOCIAL MEDIA

Social media gambling ads generated over 34 million views. This is a notable increase from last year's 24 million and highlights the reach of gambling operators via this method.

**70%** CONTENT MARKETING ADS BREACH ADVERTISING CODES

Out of 280 content marketing ads sent by major gambling brands, 70% were not clearly identifiable as advertising, therefore breaching key advertising regulations.

# 2 | INTRO & BACKGROUND

For the third consecutive year, this study investigates the prevalence of gambling marketing during the Premier League's opening weekend. The project seeks to build a longitudinal dataset through the publication of four annual reports (2023–2026), enabling us to monitor shifts in the prevalence of gambling marketing and advertising within the Premier League. This not only helps to shed light on the prevalence of gambling marketing, but also allows us to evaluate how regulatory changes influence the amount of gambling promotion visible during football coverage. This report follows the same methodology as the previous two years (Rossi et al., 2023; 2024), examining gambling marketing across four key platforms: live match broadcasts, Sky Sports News, TalkSport radio, and social media. Exploring gambling marketing across these platforms is valuable as this is inclusive of the multiple channels through which Premier League football are commonly consumed during the opening weekend of the season.

As discussed in the previous report (Rossi et al., 2024), marketing in sport takes many different forms (Cornwell & Jahn, 2023; Smith, 2012). This can range from the sponsorship of teams, leagues, or specific events, through to stadium naming rights, official supplier agreements and partnerships. In the case of sponsorship, companies such as gambling operators provide financial or in-kind support in exchange for access to the commercial opportunities that the association with sport provides (Meenaghan, 1991). Sponsorship is a particularly popular strategy, enabling brands to connect with large audiences at sporting events (Hsiao et al., 2021). Within football, gambling companies frequently use sponsorship deals with clubs and leagues as a way to advertise to fans and wider audiences. In the English Premier League, gambling marketing appears in multiple formats, including television- or radio-based commercials, and sponsorship-linked marketing, where gambling brands can appear on teams' shirts, matchday programmes, and pitchside advertising boards (Rossi et al., 2024; Sharman et al., 2020). Beyond the stadium, gambling brands also extend their reach through social media marketing, a practice that raises additional concerns due to its potential appeal and accessibility to children and vulnerable groups (Singer et al., 2024). Gambling-related marketing can reach the Premier League's audience through a variety of channels. Throughout the report we use the term "messages" to refer to all instances of exposure to gambling brands resulting from their wide range of marketing activities.

There is a growing body of evidence suggesting the influence of exposure to gambling-related marketing on subsequent gambling behaviours (McGrane et al., 2023), which can increase the risk of harm. Gambling harm refers to the negative impacts of gambling on health and wellbeing at individual, family, community, and societal levels, ranging from financial and relational problems to mental health issues (Langham et al., 2016; Wardle et al., 2018). While often seen as a harmless pastime, gambling can cause significant harm. According to the Gambling Survey for Great Britain (2024), 48% of adults gamble regularly. Of the respondents, 2.5% were categorised as being at risk of experiencing severe gambling harms, 3.7% at moderate risk, and 8.3% at low risk of gambling harms. These figures highlight gambling as a harmful product requiring regulation. Meanwhile, research carried out in 2018 found that the gambling industry spends £1.5 billion every year on marketing in the UK (Regulus Partners, 2018), although this amount may have grown since then. Such marketing drives consumption and can play a key role in normalising gambling as an everyday leisure activity (McGee, 2020).

## Gambling marking in the context of self-regulation

Currently, gambling marketing in the UK is mainly regulated through industry self-regulation, either via the Advertising Standards Authority, or voluntary industry codes, and research has continuously demonstrated the failure of this self-regulatory approach in protecting consumers from potential gambling harms via marketing (Sharman et al 2024; Rossi et al., 2023; Rossi et al., 2024). This self-regulatory approach contrasts with other jurisdictions in Europe, such as Italy, Spain, Germany, the Netherlands and Belgium, which have taken action by implementing marketing regulations to reduce the impact of gambling (Wilson et al., 2024). Such restrictions are increasingly considered as standard practice across Europe where it has become commonplace for gambling to be considered by government as a public health issue in line with other harmful products such as alcohol and tobacco (Wilson et al., 2024).

Most notable examples of self-regulatory measures include the gambling industry's "whistle-to-whistle" ban, the Premier League's forthcoming withdrawal of gambling brands from the front of shirts, and the football sector's Sponsorship Code of Conduct. Firstly, in 2019, the gambling industry introduced a voluntary advertising ban during live sports broadcasts referred to as the 'whistle-to-whistle' ban. This restriction prevents televised gambling ads from appearing five minutes before kick-off until five minutes after the final whistle, before 9pm, removing them from half-time coverage (McGrane et al., 2025a). However, the ban has been criticised as limited in scope and largely symbolic, with the ban leading to increased televised advertising in the unrestricted period (McGrane et al., 2025a), and not addressing gambling advertising occurring through other channels (Torrance et al., 2023; Rossi et al., 2024).

Another example of a self-regulatory measure is the Premier League's commitment to removing gambling sponsorship from front-of-shirt placements by the end of the 2025/26 season. Our previous research found that front-of-shirt sponsorship makes up for approximately 8% of the overall gambling marketing exposure during live match broadcasts, thereby rendering this measure as largely tokenistic and unlikely to significantly reduce exposure to gambling advertising (Rossi et al., 2024).

Finally, in July 2024, after pressure via the DCMS Gambling Act White Paper, the Premier League, alongside the FA, EFL, and Women's Super League, introduced a voluntary Code of Conduct for Gambling-Related Agreements, effective from the 2024/25 season. This framework was co-developed by the Betting and Gaming Council. In their press release they state: "This new framework, created by the BGC to drive up standards, sets new standards on safer gambling sponsorship across four key principles" (BGC, 2024). These four principles are: protection, social responsibility, reinvestment, and integrity, and includes commitments in these four areas. Despite the introduction of this code of conduct, last year's report found a stark increase in gambling marketing from 10,999 in 2023, to 29,145 in 2024, indicating that despite these self-regulatory measures, the relationship between football and gambling is becoming increasingly intertwined.

In summary, while voluntary measures aimed at protecting football fans have grown, the prevalence of gambling messages has risen. Initiatives like the front-of-shirt sponsorship ban, the "whistle-to-whistle" restriction, and the Sponsorship Code of Conduct signals that the Premier League and the gambling industry recognise the potential harms of gambling advertising. Yet, these measures seem largely symbolic and fall short of effectively protecting football fans from gambling promotions (see Rossi et al., 2024). It is becoming increasingly evident that these self-regulatory steps implemented by the industry, largely to pre-empt stricter government regulation, are not succeeding in preventing exposure to gambling marketing.

## Unlicensed Gambling Operators in the UK

This year's study also occurred against the backdrop of a debate around the presence of unlicensed gambling brands in the UK, particularly in the Premier League (Gambling Commission, 2025). However, the challenges of regulating gambling marketing in the English Premier League (EPL) extend beyond self-regulatory measures to the persistent presence of unlicensed gambling operators. The Gambling Act 2005, under Sections 33 and 330, mandates that all gambling services and their advertising in Great Britain are licenced specifically by the Gambling Commission (HM Government, 2005), therefore ensuring adherence to the Commission's Licence Conditions and Codes of Practice. In addition, the Sponsorship Code of Conduct clearly states that clubs should only enter sponsorship agreements with licensed brands.

In recent years, overseas gambling brands have partnered with licensed entities, such as TGP Europe, in order to legally operate in Great Britain. These arrangements enabled brands to advertise via the Premier League while meeting compliance requirements in Great Britain despite advertising to markets such as China, where online gambling has been banned since 2019 (Xinhua News Agency, 2020). However, since 2023, intensified scrutiny from the Gambling Commission has curtailed such agreements, culminating in TGP Europe's surrender of its license in 2025 following a £3.3 million penalty for regulatory breaches (Gambling Commission, 2025). Nevertheless, pre-existing sponsorship contracts, such as Stake with Everton, continue to display unlicensed brands, prompting warnings to Premier League clubs from the Gambling Commission (2025) on the risks of agreements with unlicensed brands.

> With 27,440 gambling messages recorded in a single weekend, the Premier League has become a saturated marketing environment, where ever more brands are now competing for the same limited spaces - driving intensity rather than reducing exposure.

# 3 | AIMS

Our work continues the work reported during previous seasons (Rossi et al., 2023, 2024) exploring the prevalence of gambling marketing in the Premier League and the efficacy of current regulations designed to reduce exposure to gambling marketing. Specifically, this study sought to achieve the following aims:

1. To measure the prevalence of gambling marketing on sports-related media during the opening weekend of the 2025/2026 in the Premier League.
2. To consider the effectiveness of the current regulatory framework in the context of the self-regulatory approach currently adopted in the UK, and make recommendations to help protect football supporters from gambling harms.
3. To track trends in the techniques deployed by operators when marketing via the Premier League across the last three years.

# 4 | METHODOLOGY

## 4.1 TELEVISED MATCH BROADCASTS

To investigate the prevalence of gambling marketing during live football matches, we employed the same approach as the previous two years' studies. Our codebook, which was the instrument we used to record each instance of gambling marketing, was first inspired by Purves et al.'s (2020) study of gambling marketing exposure during televised sports. The codebook was slightly modified last year (Rossi et al., 2024) to reflect the current marketing techniques used by gambling operators in the Premier League. The variables measured were: timestamp, format, duration of gambling message(s) in seconds, number of identical messages, gambling brand featured, type of gambling referenced, whether the message is a generic or indirect reference to gambling, and the presence of age restriction or harm reduction messaging. Variables are fully defined in the Technical Appendix. Similar to last year, the 'format' captured messages as appearing on static advertising hoardings, electronic advertising hoardings (full or part), merchandise worn by supporters, the front of a player's shirt, the sleeve of a player's shirt, integrated graphic, sponsorship lead-in, commercial advertising break, interview or press conference, stadium structure, and 'other' to capture anything else. As with previous years (Rossi et al., 2023, 2024), the number of identical messages followed Purves et al.'s (2020) approach, capturing the maximum number of messages (for example, logos) per format visible during each individual camera shot. Gambling messages were defined as any individual gambling brand logo or reference to gambling exposed to viewers as a result of gambling brands' marketing activities.

In line with previous years' approaches, we analysed all live broadcasts taking place during the opening weekend of the Premier League weekend. Therefore, all seven Premier League matches that were broadcast live during the season were included. The full list of matches is introduced in Table 1. Our analysis included the entire broadcast of each match, including the match itself, pre- and post-match studio discussions, half-time studio discussions and advertising breaks. The length of each broadcast varied due to the demands of the weekend's broadcasting schedule. For example, the broadcasts of matches between Liverpool and AFC Bournemouth and Leeds United and Everton were longer due to the increased pre- and post-match discussion. On the other hand, the length was shorter for Chelsea-Crystal Palace and Nottingham Forest-Brentford due to them both preceding the match between Manchester United and Arsenal. The total length of all footage analysed was 28 hours, 50 minutes and 17 seconds (compared to just over 24 hours last year).

We hired a team of research assistants to conduct the recording (or coding) of gambling messages exposed during each broadcast into separate versions of the codebook. All assistants were experienced thanks to their work on previous iterations of the project (i.e. Rossi et al., 2023, 2024). Agreement was ensured across coders firstly through training on the use of the codebook, and a pilot exercise where coders completed coding as a team exercise during a short amount of footage. They then independently coded the same 12 minutes of footage. Agreement across variables, as in previous years, was measured by Krippendorff's Alpha, a measure designed to assess levels of agreement across multiple researchers

**Table 1: Details of the televised matches during the opening weekend of the Premier League season 2025/2026**

| Match | Date and kick-off time | Broadcaster | Length of footage |
|---|---|---|---|
| Liverpool v AFC Bournemouth | Friday 15th August, 8:00pm | Sky Sports | 270 minutes, 8 seconds |
| Aston Villa v Newcastle United | Saturday 16th August, 12:30pm | TNT Sports | 285 minutes, 11 seconds |
| Wolverhampton Wanderers v Manchester City | Saturday 16th August, 5:30pm | Sky Sports | 239 minutes, 59 seconds |
| Chelsea v Crystal Palace | Sunday 17th August, 2:00pm | Sky Sports | 227 minutes, 13 seconds |
| Nottingham Forest v Brentford | Sunday 17th August, 2:00pm | Sky Sports | 209 minutes, 35 seconds |
| Manchester United v Arsenal | Sunday 17th August, 4:30pm | Sky Sports | 239 minutes, 36 seconds |
| Leeds United v Everton | Monday 18th August, 8:00pm | Sky Sports | 258 minutes, 35 seconds |

(Hayes & Krippendorff, 2007). A score of 0.66 is required to indicate acceptable agreement between researchers. Our exercise found that Krippendorff's Alpha scored measured between 0.94 and 1.00 across all variables. With acceptable levels of agreement established, the coders proceeded to code matches individually, discussing queries with the research team.

## 4.2 SKY SPORTS NEWS

Similar to the previous two years, we also analysed the prevalence of gambling marketing during a day of Sky Sports News (SSN), a commercial sports news channel broadcast in the UK. We specifically analysed coverage on Saturday 16th August 2025 from 7am-11:00pm. The inclusion of SSN reflected the importance of the channel and its flagship programme, Soccer Saturday, which is watched by football supporters who are keeping track of scores on a Saturday afternoon (Sky Group, 2023), a period during which games kicking off in the UK are not permitted to be televised domestically (UEFA, 2022). The inclusion of SSN therefore ensured the analysis of Premier League matches (Tottenham Hotspur v Burnley, Sunderland v West Ham United, and Brighton v Fulham) which, while not broadcast live, were still being covered during live television.

The codebook for SSN followed the same as last year's study. Full definitions of the variables (for example, time of gambling message, duration in seconds, format, etc) that were measured can be found in the Technical Appendix. In addition to the variables measured in the match codebook, an additional 'Match Highlights' variable measured if gambling messages appeared as part of match highlights, while the 'Format' variable included the option of 'spoken reference', measuring whether gambling had been mentioned during studio-based or reporter-led discussions. Given the similarity of the codebooks, intercoder reliability was established as mentioned earlier, with coders proceeding to individually analyse sections of the SSN coverage.

## 4.3 TALKSPORT RADIO

TalkSport Radio, promoted as "the world's biggest sports radio station" (TalkSport, 2025), was included again due to its coverage of the English Premier League. For TalkSport, we used the same codebook as the previous two years (Rossi et al., 2023, 2024) to analyse the prevalence of gambling advertising exposed during Saturday 16th August from 6am until 5:30pm. The two previous years have explored radio coverage up until 9pm. However, technical issues meant that a shorter period of analysis was available for this year. As with last year, the format variable included sponsorship lead-in, advertisement break, spoken reference, and 'other'. We also captured the duration, number of gambling messages heard, brand referenced, and the type of gambling (e.g. sports betting, gaming/slots, lottery, bingo or casino), as well as the presence of a harm reduction or age restriction message. Variables are fully defined in the Technical Appendix. The TalkSport radio coverage was analysed by three coders, with Krippendorff Alpha scores of between 0.94 and 1.00 indicating acceptable agreement between coders.

## 4.4 SOCIAL MEDIA

Finally, we focused on the ten largest social media profiles among GB-licensed gambling brands, including Bet365, Betfred, Betfair, Betway, Coral, Ladbrokes, Sky Bet, Paddy Power, Unibet, and William Hill. Collectively, these brands have over 11 million followers. The only change from last year is that Betway has overtaken Betvictor in followership, so Betvictor was replaced with Betway to maintain coverage of the 10 largest brands (see Table 2). Following the previous years' approach, we used the Meta Ad Library to monitor and capture screenshots of active ads on Instagram from these brands between 15th and 18th August. For organic gambling ads, our approach aligned with previous research into gambling marketing (Houghton et al., 2019; Singer et al., 2023) and concentrated on X. We recorded and analysed all organic ads posted by the ten gambling brands during the Premier League weekend (15th to 18th August).

We used the same social media analysis codebook as the previous two years, with minor modifications to ensure comparability across different years. The codebook is based on previous research (see Houghton et al., 2019; Rossi et al., 2021, 2024). As with previous years, we explored paid-for advertising which allows for precise targeting based on demographics and user data, as well as organic advertising which is conversely reliant on engaging content which is appealing for users to share (Rossi & Nairn, 2022).

**Table 2:** Ten largest UK brands measured by total followers across X, Instagram, and Facebook. Note: Whilst all brands hold UK gambling licences, some have their businesses registered abroad (mainly in Malta or Gibraltar). Due to a loophole, all of their organic social media ads fell outside the ASA's remit until 1st September 2025.

| Brand | Business Registered | Twitter/X Followers | Instagram Followers | Facebook Followers | Total Followers |
|---|---|---|---|---|---|
| Bet365 | Malta | 490,500 | 31,400 | 1,900,000 | 2,421,900 |
| Paddy Power | Malta | 751,900 | 250,000 | 1,600,000 | 2,601,900 |
| Sky Bet | UK | 426,700 | 83,000 | 955,000 | 1,464,700 |
| Unibet | UK | 130,500 | 28,800 | 937,000 | 1,096,300 |
| William Hill | Gibraltar | 242,700 | 32,900 | 692,000 | 967,600 |
| Betfair | Malta | 162,600 | 14,200 | 611,000 | 787,800 |
| Coral | Gibraltar | 298,600 | 12,100 | 309,000 | 619,700 |
| Ladbrokes | Gibraltar | 193,700 | 34,800 | 342,000 | 570,500 |
| Betfred | Gibraltar | 110,900 | 7,700 | 205,000 | 323,600 |
| Betway | Malta | 143,100 | 16,400 | 211,000 | 370,500 |
| | **Total** | **2,951,200** | **511,300** | **7,762,000** | **11,224,500** |

Over 13,000 gambling messages appeared during the so-called 'whistle-to-whistle' ban, showing that self-regulation has clearly failed in reducing the volume of gambling marketing during football matches.

# 5 | RESULTS

The study discovered a total of 27,440 gambling messages during the opening weekend of the 25/26 season's English Premier League, with a slight decrease to last season's 29,415 and still a substantial increase compared to the 23/24 season's 10,999. Table 3 presents the breakdown of gambling marketing according to each medium examined in this year's study. Throughout the results section, we review the findings of the televised matches, Sky Sports News, TalkSport Radio, and social media.

**Table 3: An overview of gambling messages found during the opening weekend of the Premier League 2025/2026**

| FORMAT | Date | Total time analysed | Average gambling message per hour | No. of gambling messages |
|---|---|---|---|---|
| Televised Football Matches | 15th to 18th August | 28 hr 50 mins | 757.47 | 21,815 |
| Sky Sports News | 16th August | 16 hrs | 293.81 | 4,510 |
| TalkSport Radio | 16th August | 11 hrs 30 mins | 12.35 | 142 |
| Social Media | 15th to 18th August | 96 hrs | 10.14 | 973 |
| **TOTAL** | | | | **27,440** |

## 5.1 TELEVISED FOOTBALL MATCHES

We found that a total of 21,815 gambling messages were recorded over a total of 3,841 different incidences (entries into the codebook) during the seven televised matches. Table 4 below shows the full results. The highest number of messages were found during the matches between Wolverhampton and Manchester City (5,262), Aston Villa and Newcastle (4,115), Nottingham Forest and Brentford (4,084), and Leeds United v Everton (4,064 messages).

This year, gambling messages were slightly shorter on average during football broadcasts, appearing for an average of 7.29 seconds compared to 7.73 seconds last year. The longest average duration was seen in Leeds United v Everton (10.11 seconds), followed by Wolves v Manchester City (8.74 seconds) and Aston Villa v Newcastle (7.20 seconds). Overall, at least one gambling message was present during 21.99% of the total broadcast time across the seven matches, amounting to 6 hours and 34 minutes out of 28 hours and 50 minutes of coverage. Matches between Aston Villa and Newcastle (35.51%), Wolves and Manchester City (32.44%), Nottingham Forest and Brentford (27.87%) and Leeds United and Everton (27.18%) featured the highest proportions of broadcasts featuring at least one gambling message.

Notably, the findings highlight a substantial increase of messages occurring during the whistle-to-whistle ban period with 13,262 messages, or 60.79%, appearing during the whistle-to-whistle period compared to 10,027 (39.54%) last year. This percentage was highest in matches where teams had a gambling operator as their main sponsor (e.g. Betano and Debet), namely Wolves v Manchester City (90.84%) and Aston Villa v Newcastle (74.63%). This percentage was lower during Manchester United v Arsenal (13.29%), where neither team had a gambling operator as their main sponsor and most of the advertising was in the form of sponsorship lead-in ads.

**Table 4:** Key results from the analysis of the televised Premier League matches

| Variable | Liverpool v Bour-nemouth | Aston Villa v Newcastle United | Wolves v Man City | Chelsea v Crystal Palace | Nottingham Forest v Brentford | Man Utd v Arsenal | Leeds United v Everton | Total |
|---|---|---|---|---|---|---|---|---|
| Total number of incidences* | 282 | 1,068 | 744 | 410 | 719 | 178 | 440 | **3,841** |
| Total number of gambling messages** | 422 | 4,115 | 5,262 | 2,100 | 4,084 | 1,768 | 4,064 | **21,815** |
| Average number of gambling messages per broadcast minute | 1.56 | 14.43 | 21.93 | 9.24 | 19.49 | 7.38 | 15.72 | **12.61** |
| Average duration of gambling messages (seconds) | 5.86 | 7.20 | 8.74 | 5.02 | 6.15 | 6.85 | 10.11 | **7.29** |
| Total duration of broadcast featuring at least one gambling message (minutes) | 26.75 | 101.27 | 77.85 | 28.35 | 58.40 | 17.53 | 70.28 | **380.43** |
| Percentage (%) of broadcast (minutes) featuring at least one gambling message. | 9.09% | 35.51% | 32.44% | 12.48% | 27.87% | 7.32% | 27.18% | **21.99%** |
| Percentage (%) of messages occurring during the whistle-to-whistle period | 49.05% | 74.63% | 90.84% | 31.62% | 60.68% | 13.29% | 38.21% | **60.79%** |
| Most common formats (% of messages) | Players' shirt front (54.50%) Integrated graphic (12.80%) Electronic pitchside full (10.90%) | Electronic pitchside full (30.67%) Stadium structure (27.14%) Static pitchside (22.58%) | Electronic pitchside full (67.96%) Stadium structure (21.55%) | Sponsor-ship lead-in (48.76%) Electronic pitchside full (16.57%) Players' shirt front (14.24%) | Electronic pitchside full (35.92%) Sponsor-ship lead-in (31.95%) Players' shirt front (14.42%) | Sponsor-ship lead-in (72.40%) Electronic pitchside full (15.38%) | Sponsor-ship lead-in (47.24%) Electronic pitchside full (36.96%) | **Electronic pitchside full (38.84%) Sponsor-ship lead-in (25.45%) Stadium structure (12.32%)** |
| Most common brands (% of messages) | bj88 (56.87%) Ladbrokes (14.69%) SBK (10.90%) | Betano (87.53%) Nova88 (7.19%) | Debet (43.41%) Betano (27.27%) Unibet (12.92%) | Bet365 (59.81%) Net88 (14.57%) 8XBet (8.29%) | Bet365 (42.87%) Bally's (27.01%) | Bet365 (76.58%) Parimatch (7.18%) Betfred (6.05%) | Bet365 (53.94%) Parimatch (13.51%) Betano (10.58%) | **Bet365 (32.38%) Betano (26.63%) Debet (10.64%)** |
| Most common formats of gambling referenced (% of messages) | Logo only (96.45%) | Logo only (99.66%) | Logo only (99.83%) | Sports betting (57.67%) Logo only (42.29%) | Logo only (63.44%) Sports betting (36.48%) | Sports betting (72.40%) Logo only (21.72%) | Sports betting (51.70%) Logo only (40.60%) | **Logo only (70.02%) Sports betting (28.03%)** |
| Harm reduction (% of individual incidences) | Yes (9.93%) | Yes (7.02%) | Yes (23.92%) | Yes (4.63%) | Yes (7.37%) | Yes (18.54%) | Yes (18.18%) | **Yes (12.13%)** |
| Age restriction message (% of individual incidences) | Yes (9.57%) | Yes (7.02%) | Yes (17.61%) | Yes (4.63%) | Yes (5.84%) | Yes (17.98%) | Yes (13.18%) | **Yes (10.00%)** |

*Individual gambling frequency refers to each instance of gambling marketing logged in the codebook.
**Identical messages refer to the maximum number of identical logos visible per incidence.

While sponsorship lead-ins were the most common format for gambling messages last year, this year's most prevalent form of messaging was that featured upon full electronic pitchside advertising. These messages accounted for 38.84% of messages, increasing by almost 19% compared to last year. The increased proportion of messages upon pitchside hoardings also helps to explain the increased levels of messaging to occur during the whistle-to-whistle period. Figure 1 below demonstrates a typical example of pitchside electronic advertising during a live football match, where Debet is prominently displayed along the perimeter digital signage.


**Figure 1.** Example of electronic pitchside advertising by Debet

Stadium structure-based messages, which normally consist of logos appearing on hoardings located within the crowd or on the stadium itself, also saw an increase, from less than 1% in 2024 to 12.32% in 2025. An example of stadium structure-based messaging is introduced in Figure 2, with Betano appearing on hoardings in the crowd. Figure 2 also demonstrates an example of static pitchside messaging, although these formed a much smaller proportion of the total messages (4.55%). Importantly, gambling brands appearing on the front of players' shirts images accounted for 9.66% of total messages, remaining broadly consistent with levels found during our previous research (Rossi et al., 2023; 2024). Messages on players' sleeve increased marginally from 0.47% in 2024 to 0.80% in 2025.

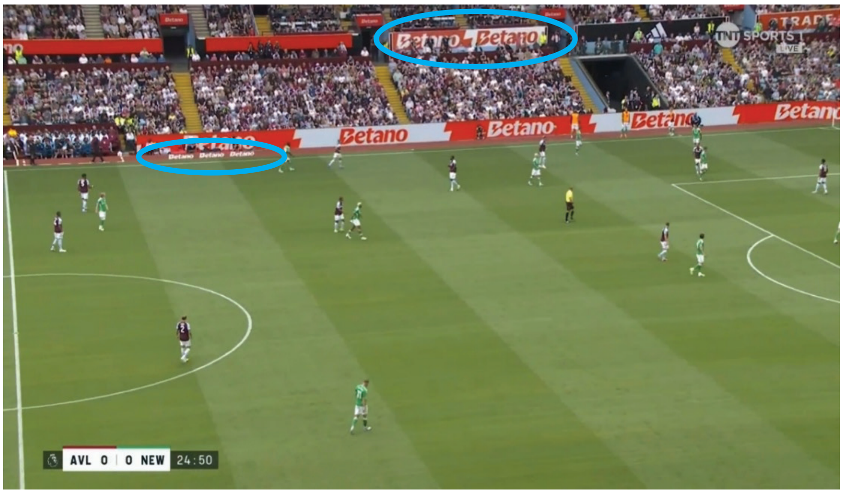



**Figure 2.** Example of stadium structure and static pitchside messages by Betano (circled in blue).

Our analysis this year uncovered more nuance in the trend of messages across the seven matches. Last year, sponsorship lead-in was the most common form of gambling advertising in five of the six matches. However, this year, three of the seven matches had different dominant formats, three with electronic pitchside advertising and one with front-of-shirt. Messages exposed during Aston Villa-Newcastle United were more evenly distributed, with messages appearing on full electronic pitchside hoardings (30.67%), stadium structure (27.14%) and static pitchside hoardings (22.58%) all featuring prominently. However, messages across full electronic hoardings (67.96%) were the most dominant format during

Wolves-Manchester City. Sponsorship lead-in ads were the most prevalent form of messages where in-match messaging was not as prominent, such as Manchester United-Arsenal where 72.40% of all ads were sponsorship lead-in. A screenshot example of Bet365's sponsorship lead-in ads is demonstrated in Figure 3, which appeared during transitions between live programming and advertising breaks outside the "whistle-to-whistle ban," which included a virtual stadium often containing 128 Bet365 logos carefully positioned on shirts, screens, and billboards. Longer versions of the lead-in featuring a maximum of 179 logos were also occasionally uncovered during the analysis.

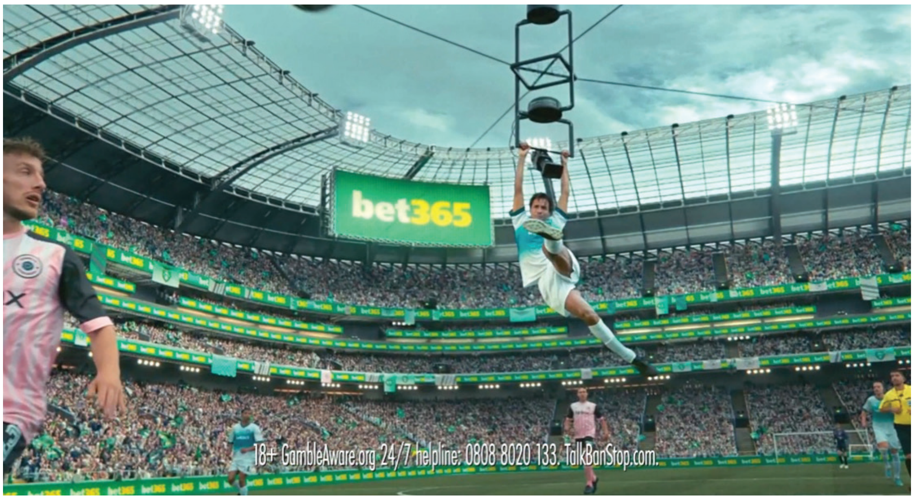



**Figure 3:** Example of Bet365 Sponsorship lead-in

The match between Liverpool and AFC Bournemouth accounted for less than 2% of all messages included within the sample. The most prominent form of messages during this match consisted of gambling brand logos appearing on the front of players' shirts (54.50%), reflecting bj88's sponsorship of AFC Bournemouth. An example of the bj88 logo on players' shirts is demonstrated in Figure 4.


**Figure 4.** Example of players' shirt front sponsorship

Gambling brands' commercials during advertising breaks accounted for 3.20% of all gambling advertising. A common strategy involves featuring former athletes and famous football-related personalities (for example, Peter Crouch), while ads may also adopt a humorous tone or capitalize on the passionate enthusiasm of sports fans, making the content more relatable and emotionally engaging.

Similar to last year, Bet365 was the most prevalent brand although its share of messages decreased from 48.53% to 32.38%. In contrast, other brands increased their share of messaging. For example, Betano increased from 4.78% to 26.63%, becoming the second most-prominent brand. Notably, Betano is not part of BGC and therefore, is therefore not subject to the whistle-to-whistle ban. Overall, the number of gambling brands featured in Premier League broadcasts increased by 42%, from 31 to 44 in one year, reflecting a more fragmented and competitive advertising landscape. The presence of other brands often reflected their sponsorship deals with specific clubs or broadcasters. For example, Betano was the most prevalent brand during the Aston Villa-Newcastle match (87.53%), bj88 was the most prominent during Liverpool-Bournemouth (56.87%) and Debet was most prominent during Wolves-Manchester City (43.41%). **Crucially, eleven brands we recorded (e.g. 8XBet, Stake or bj88) did not appear to have active licences with the UK Gambling Commission. Their messages accounted for 8.6% (1,876) of the total 21,815 gambling messages during the live broadcasts.**

As with last year, most gambling messages were 'logo only', falling from 84.07% to 70.02%, while messages related to sports betting accounted for 28.03%, increased from 15.64% last year. In addition, almost all recorded messages were attributed to marketing a specific brand, rather than generic or indirect reference. Responsible gambling messages decreased compared to last year, with 12.13% of incidences containing responsible gambling messages compared to 18.35% last year. Responsible gambling messages were varied in format, including small messages stating "GambleAware" or "Take Time to Think" during televised ads, or the presence of GambleAware on some advertising hoardings as demonstrated in Figure 5. However, none of these messages provided substantive information about the risks associated with gambling. This year a slightly higher proportion (10.00%, increased from 8.73%) included messages about the legal gambling age in the UK of 18. The different formats of age restriction messaging are also evident in Figure 6, where a small "+18" icon appears next to the "GambleAware" logo, reflecting the minimal emphasis placed on age warnings in gambling ads.



**Figure 5. Left and right:** Examples of Responsible Gambling Messaging (Ladbrokes and 8Xbet)

As with the other variables, the presence of harm reduction and age restriction messages varied greatly across matches. Chelsea v Crystal Palace had the lowest combined presence of age restriction and harm reduction messaging at just 4.63% of incidences, while Wolves v Manchester City contain the highest proportion of harm reduction messages (23.92%). Manchester United v Arsenal featured the highest proportion of age restriction messages (17.98%).

## 5.2 SKY SPORTS NEWS

During the 16 hours of Sky Sports News coverage, we recorded a total of 4,510 gambling messages across 1,356 separate incidences, a slight increase from the 4,332 messages recorded last year. The results of this analysis are presented in Table 5. Notably, 52.48 % of messages appeared during match highlights, showing the important role of match highlights in delivering gambling content to viewers.

**Table 5: Key results from the analysis of Sky Sports News**

| Sky Sports News | |
|---|---|
| **Variable** | **TOTAL** |
| **Total number of individual incidences*** | **1,356** |
| **Total number of gambling messages**** | **4,510** |
| **Average duration of gambling messages (In seconds)** | **10.09 seconds** |
| **References occurring during match highlights (% of messages)** | **Yes (52.48%)** |
| **Most common formats (% of messages)** | **Interview/Press Conference (32.64%)<br>Static Pitchside (19.76%)<br>Electronic Pitchside full (18.77%)<br>Player Shirt Front (12.35%)<br>Commercial Adverts (10.20%)** |
| **Most common brands (% of messages)** | **Skybet (23.71%)<br>Bet365 (11.47%)<br>BetMGM (8.73%)<br>Debet (8.49%)<br>Betano (7.18%)<br>W88 (6.88%)** |
| **Most common format of gambling referenced (% of messages)** | **Logo only (89.78%)<br>Sports betting (8.65%)** |
| **Specific gamble referenced (% of messages)** | **Yes (0.84%)** |
| **Generic or indirect reference (% of messages)** | **Yes (0.04%)** |
| **Harm reduction message (% of individual incidences)** | **Yes (7.37%)** |
| **Age restriction message (% of individual incidences)** | **Yes (5.90%)** |
| **Gambling messages split into times of the day** | |
| 7.00am – 9.00am | **207** |
| 9.00am – 12.00pm | **347** |
| 12.00pm – 3.00pm | **612** |
| 3.00pm – 5.00pm | **71** |
| 5.00pm – 7.00pm | **535** |
| 7.00pm – 11.00pm | **2738** |
| *Individual gambling incidences refers to each instance of gambling marketing logged in the codebook.<br>**Total messages refer to the maximum number of identical logos visible per incidence. | |

A significant shift was observed in the format of gambling messages. While accounting for only 18% of messages last year, messages appearing during interviews or press conferences became the most common format this year, accounting for 32.64% of all gambling messages. Figure 6 demonstrates how gambling messages often featured in the background during interviews or press conferences. In contrast, pitchside advertising, which was the dominant format last year with 54%, fell to 39.59%. In this category, electronic pitchside advertising (full and partial) was the second most prevalent with 19.83%, followed by static pitchside advertising with 19.76%.


**Figure 6.** Examples of messages occurring during interviews and press conferences (SkyBet and SpreadEX Sports)

Furthermore, 89.78% of all messages were logo only, indicating a continued preference for brand visibility. Sky Bet remained the most common brand with 23.71% of all messages, down from 31% last year, reflecting Sky Sports News' continued coverage of the English Football League, which consists of divisions sponsored by Sky Bet such as the Sky Bet Championship, Sky Bet League One and Sky Bet League Two. Similar to TV coverage, the number of distinct gambling brands has also increased from 37 last year to 49 this year, indicating an increasing diversity of the market and competition for visibility in sports media. Out of the 49 brands to have appeared, 13 did not appear to have a license to operate in Great Britain. These 13 brands accounted for 12.08% of messages analysed on Sky Sports News.

The presence of age restriction and harm reduction messaging remains low. Only 7.37% of individual incidences contained harm reduction messages, while 5.90% contained age restriction messages. Analysis of the time periods showed that the highest number of individual frequencies occurred during coverage between 7pm and 10pm (52.88%). The increased number of incidences occurring during the evening time reflects the coverage of match highlights (52.48%), where gambling messages were more prevalent on pitchside hoardings or players' shirts.

Nearly one in ten gambling messages promoted unlicensed operators, exposing the weakness of industry-led codes and the urgent need for government action.

## 5.3 TALKSPORT RADIO

The 2025 analysis of TalkSport radio broadcasts identified 142 gambling-related messages, reflecting a decline of approximately one-third compared to the previous year's 214 messages. These findings are presented in Table 6. Consistent with previous years, commercial breaks accounted for 58.45% of all gambling marketing on radio, with Betfair remaining the most frequently referenced brand (52.11%). Given the station's emphasis on sports programming, sports betting was still the predominant form of gambling, comprising 59.86% of references. Nevertheless, other gambling types, such as lotteries and casino/card games, were also promoted to listeners. Furthermore, most incidences (73.97%) incorporated harm reduction messages, with a higher proportion (89.04%) including age restriction warnings.

**Table 6:** **Full results from the analysis of TalkSport radio.**

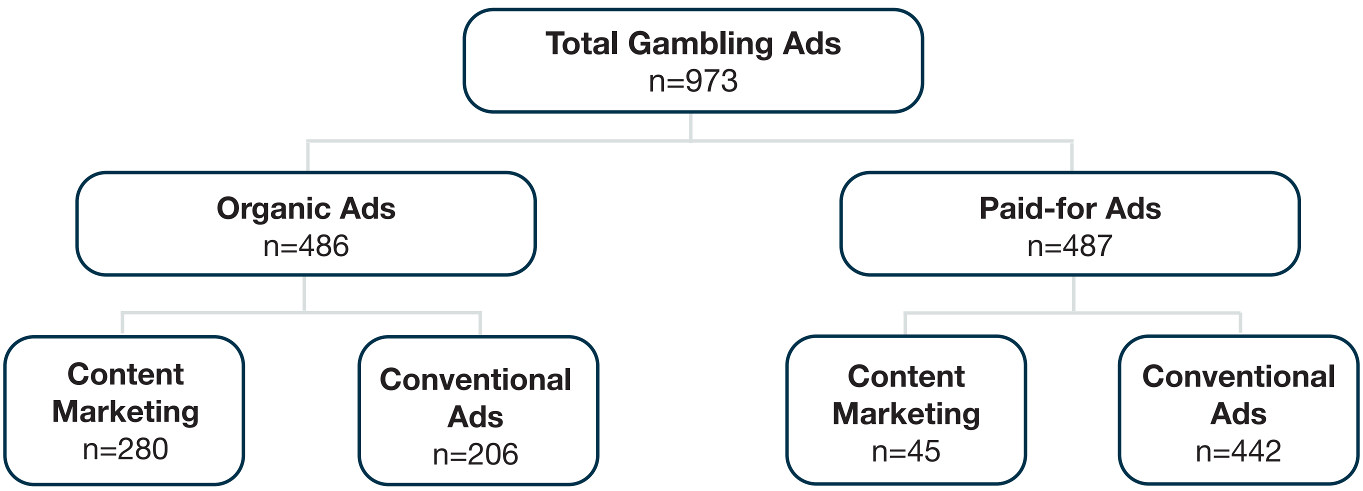
| Variable | TOTAL |
|---|---|
| Total number of individual incidences | 73 |
| Total number of gambling messages | 142 |
| Average duration of gambling messages (seconds) | 28.52 |
| Most common format (% of messages) | Commercial ad break (58.45%) |
| Most common brand (% of messages) | Betfair (52.11%) |
| Most common format of gambling referenced (% of messages) | Sports betting (59.86%) |
| Specific gamble referenced (% of messages) | Yes (41.55%) |
| Generic or indirect reference (% of messages) | Yes (0%) |
| Harm reduction message (% of incidences) | Yes (73.97%) |
| Age restriction message (% of incidences) | Yes (89.04%) |

*Individual gambling incidences refers to each instance of gambling marketing logged in the codebook.
**Total messages refers to the maximum number of references heard per incidence.

## 5.4 SOCIAL MEDIA

A total of 973 gambling ads were identified from the ten largest GB licensed betting brands between 15th and 18th August. This suggests an increase from 909 ads identified last year. As shown in Figure 7, 486 of these were paid ads distributed across Instagram and Facebook, while 486 were shared organically on X (formerly Twitter). The below flowchart describes how ads are distributed across content marketing and conventional advertising. The following sections begin with an analysis of organic posts, followed by a more in-depth results of paid advertising analysis.

**Figure 7:** **Breakdown of sample of posts included in the social media analysis.**



### *Organic Advertising*

Of the 486 organic ads, 280 were identified as content marketing and 206 as conventional advertising. Thus, content marketing accounts for 58% of all organic ads –an increase compared to last year, where content marketing added up to 48% of organic ads. This form of advertising has received closer scrutiny due to its strong appeal to younger audiences and its potential to violate existing advertising guidelines (Rossi & Nairn, 2024; Luck & Ungoed-Thomas, 2024). To illustrate the differences in format and regulatory implications, Table 7 provides a clear distinction between content marketing and conventional advertising.

**Table 7: Results of the content analysis of organic ads (content marketing and conventional advertising)**

| Code | Definition | Content Marketing | Conventional Ads | Total |
|---|---|---|---|---|
| *Volume and Engagement* | | | | |
| Likes | How many likes do the ads have? | 128,211 (avg. 458) | 2,666 (avg. 13) | 130,877 (avg. 269) |
| Shares | How many shares do the ads have? | 13,406 (avg. 48) | 1,191 (avg. 6) | 14,597 (avg. 30) |
| Impressions / Views | How many impressions do the ads have? | 31,536,959 (avg. 112,632) | 2,816,959 (avg. 13,675) | 34,353,942 (avg. 70,687) |
| *Content* | | | | |
| Use of emojis | Ads that used use emojis. | 139 (50%) | 157 (76%) | 296 (61%) |
| Use of humour | Ads that use humorous content. | 54 (19%) | 6 (3%) | 60 (12%) |
| Reference to the weekend's football | Ads that refer to the weekend's Premier League football. | 211 (75%) | 124 (60%) | 335 (69%) |
| Signpost to method of gambling | Ads that make reference to how to the audience could participate in the gamble (e.g. having a link to the website)? | 0 | 91 (44%) | 91 (19%) |
| Odds | Ads that present odds for a specific bet. | 0 | 78 (38%) | 78 (16%) |
| Bonus or inducement | Ads that include a bonus or inducement (e.g. sign-on, deposit match, etc.). | 0 | 97 (47%) | 97 (20%) |
| *Social Responsibility & Adherence to Advertising Regulations* | | | | |
| Age restriction | Ads that make reference to the age restricted nature of gambling. | 68 (24%) | 183 (88%) | 251 (52%) |
| Harm reduction messaging | Ads that include a harm reduction message. | 69 (25%) | 185 (89%) | 254 (52%) |
| T&Cs stated | Ads that include information on the T&Cs. | 14 (5%) | 95 (46%) | 109 (22%) |
| Appeal to children | Ads that are of strong appeal to children, based on CAP guidance. | 0 | 0 | 0 |
| Not clearly identifiable as advertising | Ads that are not clearly identifiable as advertising. | 196 (70%) | 9 (4%) | 205 (42%) |
| Posted during match | Ads posted during "whistle-to-whistle" ban. | 170 (56%) | 69 (21%) | 239 (38%) |

### *Volume and Engagement*

Compared to the approximately nine million viewers who watch the Premier League opening weekend on TV (Premier League, 2023), social media advertising from ten betting brands reached over 34.3 million views in the same weekend, a substantial increase from 23 million the previous year. The level of engagement was also significant, with users sharing these ads 14,597 times and liking them 130,877 times. Content marketing was particularly strong in reaching and engaging users, accounting for 92% of views, 92% of shares and 98% of likes. This trend, especially the increase in views of content marketing from 77% last year to 92% this year, shows a clear advantage over conventional advertising formats. Indeed, under the 50 most viewed ads, only two were conventional advertising – the rest content marketing. The most successful conventional ad, has 200,000 impressions, compared to most successful content marketing ad reaping over 3.1 million impressions.

Among the most successful ads in terms of engagement was a re-tweet by SkyBet on 15th August, which gained 3.1 million views, 94,961 poll votes, 523 comments, and 2,900 likes. The ad featured a user poll asking followers to vote for the winner of The Ultimate. Similarly, two highly successful posts by Paddy Power attracted between 650,000 and 1 million views, and 12,000–14,000 likes each. Both were shared during live matches, seemingly to draw attention to the games and remind users that Paddy Power was available for betting. We have reached out to ASA, who have confirmed all three of these high-performing gambling ads fall outside the ASA's remit. The ASA has argued that such content is not directly connected to selling or promoting goods and therefore does not qualify as advertising.


**Figure 8:** Highly success ads reaching collectively almost 5m views. **Left:** Social media ad by Sky Bet including a poll. **Right:** Two ads by Paddy Power, that were posted during live Premier League matches.

### *Content*

Because organic ads rely heavily on user engagement, they often used strategies such as humour (12%), the use of emojis (61%) and references to the Premier League opening weekend (69%). In particular, content marketing was more likely to use humour (19%) and Premier League references (75%) than conventional ads. In line with the content marketing strategy, none of the content marketing posts included direct references to gambling, while almost half (42%) of conventional ads included betting offers, 39% displayed betting odds and 49% offered financial incentives such as bonuses or free bets, up from 28% the previous year.

### *Social Responsibility and Adherence to Advertising Regulations*

In our organic sample, 52% of ads included age restrictions and harm reduction messages. When focusing on content marketing, this reduced to only 24% and 25% respectively. As opposed to last year, where around 7% of ads were judged as being appealing to children by including images of famous sportspeople, this year, we found no such instance.

Advertising regulations in the UK stipulate that "Marketing communications must be obviously identifiable as such." (CAP Code 2.1). In our research, however, 196 (70%) of content marketing (and 9 conventional ads) ads were deemed to be not clearly identifiable as marketing communication. These ads omitted any indication that the post was, indeed, advertising. They did not include age warning, harm reduction messages or any link to gambling (for example, odds, or a link to an operator website). The ASA has argued that all posts from brands' owned social media are generally recognisable as advertising. We disagree. First, our previous research, based on an online experiment with over 650 participants, showed that neither children nor adults were able to clearly identify gambling content marketing as advertising (Rossi & Nairn, 2024). Second, even when users do recognise a post as advertising, they do not necessarily perceive it as gambling advertising. With over 1,800 licensed brands (see Gambling Commission licencing register) - many of them new and without obvious gambling-related names - recognition as gambling advertising is unlikely. We have repeatedly raised this concern with the ASA, yet to date they have provided no reassurance or evidence to the contrary. Accordingly, we argue that in total, 205 analysed ads are in breach with CAP Code 2.1, by not being clearly identifiable as advertising.

It is important to note that, due to a loophole in ASA regulations (Burgess, 2025), eight of the ten gambling brands examined here fell outside the ASA's remit because their offices were registered abroad. Although this loophole was only closed on 1 September 2025, the ads in this study were collected in August 2025 and were therefore not covered. As a result, only Sky Bet and Unibet were subject to ASA regulation, meaning that 371 of the 486 organic ads analysed (76.4%), or 38.1% of the 972 total ads, fell outside the ASA's remit, despite the ASA having been aware of this loophole for years.

*Paid-for Advertising*

The findings from our analysis of paid-for advertising are in Table 8. As the UK is not subject to the European Digital Markets Act, it is only possible to retrieve limited data – and not, for example, on ad targeting or audience reach from the Meta Ad Library. However, having examined similar campaigns run by the above-mentioned brands in Ireland and the Netherlands, where such transparency is required, there is strong reason to believe that the total recorded 486 ads may have reached several millions of users in the UK. Our content analysis of paid gambling ads on social media revealed several areas of concern. Most notably, for the first time this year, 45 of the 486 ads (approximately 9%) used content marketing strategies. This is particularly concerning, as content marketing often blurs the line between advertising and editorial content.

**Table 8: Results from the analysis of paid-for ads.**

| Code | Definition | Total |
|---|---|---|
| *Marketing Design* | | |
| Use of emojis | Ads that used use emojis. | 422 (86.8%) |
| Use of humour | Ads that use humorous content. | 6 (1.2%) |
| Reference to popular culture. | Ads that refer to the weekend's Premier League football. | 159 (32.7%) |
| *Gambling Related Content* | | |
| Signpost to method of gambling | Ads that make reference to how to the audience could participate in the gamble (e.g. having a link to the website). | 378 (77.8%) |
| Bonus or inducement | Ads that offer bonus or monetary inducement (sign on bonus, free bets etc.). | 339 (69.8%) |
| Odds | Ads that present odds for a specific bet. | 43 (8.8%) |
| *Social Responsibility & Adherence to Advertising Regulations* | | |
| Age restriction | Ads that make reference to the age restricted nature of gambling. | 379 (78.0%) |
| Harm reduction messaging | Ads that include a harm reduction message. | 372 (76.5%) |
| T&Cs stated | Ads that include information on the T&Cs. | 365 (75.1%) |
| Clearly identifiable as advertising. | Ads that are clearly identifiable as advertising. | 450 (92.6%) |
| Active Sportsperson Shown (appeal code) | Ads that feature or make reference to an active sports person. | 16 (3.3%) |

The analysis of paid-for ads reveals figures that are mostly consistent with last year's findings. 86.8% of paid ads included emojis, indicating a strategic emphasis on visual cues and emotional resonance. In stark contrast to organic content, 1.2% of paid ads used humour. Furthermore, 32.7% of ads explicitly referenced the Premier League weekend, often highlighting specific matches, displaying betting odds or promoting offers tailored to those events, a possible deliberate attempt to capitalize on periods of peak fan engagement and enthusiasm.

Our analysis shows that references to gambling methods and direct links are strongly prevalent in paid-for ads, with 77.8% of ads containing such elements. Furthermore, 69.8% of paid ads promoted financial incentives, such as sign-up bonuses or free bets, designed to attract user engagement. By continuously directing users to gambling platforms and combining these with monetary incentives, these ads act as a direct gateway to betting opportunities. This seamless access may increase the risk of impulsive gambling behaviours, particularly among those who are vulnerable or at risk (Hing et al., 2014). Importantly, because these ads are paid, they are algorithmically targeted and can appear in users' feeds without any prior interest or engagement with gambling-related content. This involuntary exposure raises ethical concerns about the reach and impact of such marketing strategies.

A notable example is the Betway paid advertisement featuring Thierry Henry, often regarded as the greatest player in Premier League history (BBC Sport, 2021), which was released on Facebook and Instagram on August 8, 2025 (Figure 8). The advertisement introduces him as Betway's global ambassador and includes a responsible gambling message ("Responsible Gambling the 18+ Way | GambleAware.org"), but the main focus of the advertisement is to encourage users to sign up and "#FeelTheAction". Using a famous sports figure like Henry acts as a mediator through which the skill-based attributes of the sport are transferred to the gambling products, thereby reducing the perceived risk associated with sports betting (Lopez-Gonzalez et al., 2021).

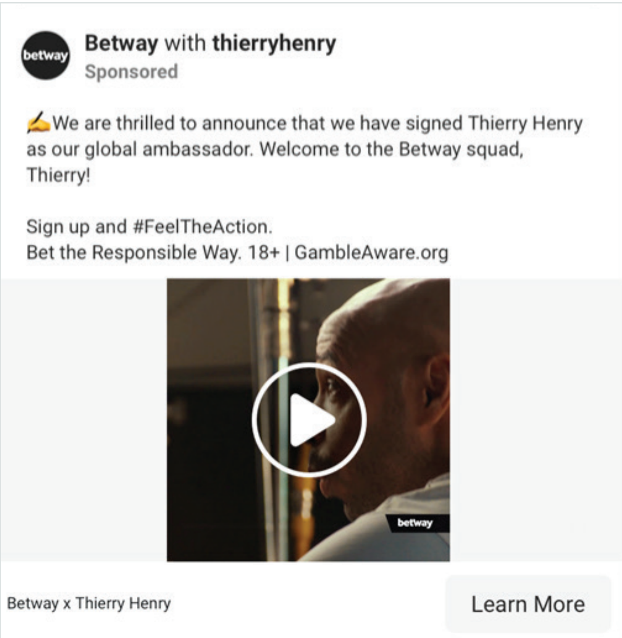



**Figure 9:** Paid social media advertising by Betway featuring Thierry Henry as global ambassador

In addition to the emergence of content marketing in paid gambling ads for the first time, our analysis shows a decline in social responsibility markers. Specifically, the inclusion of age restriction warnings has fallen from 92.7% last year to 78.0%, harm reduction messages have fallen from 93.9% to 76.5%, and the presence of terms and conditions has fallen from 85.5% to 75.1%. These declines represent a significant step backwards in responsible advertising practices. 92.6% of paid ads were clearly identifiable as advertising content, in contrast to the often-ambiguous nature of organic ads. Finally, 3.3% of paid ads featured or referenced active athletes, raising further questions about the use of celebrity endorsements and their potential impact on consumer behaviour.

# 6 | DISCUSSION

For the third year in a row, this study tracks gambling marketing across televised matches, sports news, radio, and social media during the Premier League's opening weekend. In 2025, we recorded 27,440 gambling messages - a marginal 5.9% decline from 2024's 29,145, but still a major rise from 10,999 in 2023. Televised matches remain the main driver, with the Wolves v Man City game alone featuring 5,262 messages. While TalkSport radio showed a decline, social media activity rose modestly. Overall, marketing volume remains persistently high, confirming that last year's surge was no outlier and reflecting a saturated market with more brands competing and new formats emerging (e.g., stadium structures).

Compared to 2024, match broadcasts fell slightly to 21,815 messages (–7.9%), but still averaged 12.61 messages per broadcast minute. Sky Sports News grew 4.1% (4,510 vs. 4,332), TalkSport dropped 33.6% (142 vs. 214), and social media increased 7% (973 vs. 909). These patterns highlight three themes: the sustained high volume of gambling promotion alongside unlicensed brand proliferation; the deepening entrenchment of gambling in football culture; and the increasing failure of self-regulation across the board. Table 9 summarises the results, and changes to previous years.

**Table 9: Comparison of Gambling Message Numbers (2023-2025)**

| FORMAT | 2023 | 2024 | 2025 | Change Rate (2024-2025) |
|---|---|---|---|---|
| Televised Matches | 6,966 | 23,690 | 21,815 | -7.9% |
| Sky Sports News | 2,014 | 4,332 | 4,510 | +4.1% |
| TalkSport Radio | 117 | 214 | 142 | -33.6% |
| Social Media | 1,902 | 909 | 973 | +7% |
| **TOTAL** | **10,999** | **29,145** | **27,440** | **-5.9%** |

## Gambling Marketing and the Normalisation of Gambling

Our findings contribute to extant research highlighting the pervasiveness of gambling promotion, which is concerning given its potential to normalise gambling as a part of football consumption (Bunn et al., 2019). Gambling marketing plays a significant role in the normalisation of gambling within the Premier League. Indeed, gambling promotion is argued to be inescapable for football spectators and professional players (Purves et al., 2020; Rossi et al., 2024; Sharman et al., 2023). Through widespread exposure across shirt sponsorship, pitchside advertising, broadcast coverage, and digital media, gambling brands are embedded into the everyday experience of football. This constant presence positions gambling as a routine and accepted part of football consumption, shaping fan perceptions and behaviours. As a result, marketing not only promotes individual operators but also contributes to a cultural environment where gambling is increasingly seen as a normal, even expected, aspect of football fandom.

Research points to the relationship between gambling marketing and gambling-related harm (García-Pérez et al., 2024; Hing et al., 2024; McGrane et al., 2023; McGrane et al., 2025b), although proving direct causation is complex (Newall et al., 2024). Evidence suggests that such marketing can prompt gambling urges, encourage greater participation, and make it more difficult for those already experiencing harm to reduce their gambling (Deans et al., 2017; Killick & Griffiths, 2021). For example, a previous study found that the widespread presence of marketing reinforced the view of betting as a routine activity (Lopez-Gonzalez et al., 2019). This highlights how gambling marketing embeds betting into football culture, and can encourage behaviours that can contribute to gambling harms (Hing et al., 2024; McGrane et al., 2023).

One of the main differences in this year's report compared to last year's, is the increase in the number of brands entering the market from 31 in 2024 to 43 in 2025. Nearly 30,000 ads during the opening weekend of the Premier League in two consecutive years demonstrates the saturation of gambling marketing in this space. In such crowded spaces, brands compete aggressively for visibility and market share, further intensifying the volume of gambling marketing. This not only helps to explain the continued pervasiveness of gambling marketing, but also the increase in brands entering the market. Concerningly, gambling advertisement in football shows no sign of slowing down.

The continued prevalence of gambling marketing in the Premier League is concerning because of its potential to normalise gambling, particularly among children and vulnerable groups. In the UK, gambling is often positioned as a harmless leisure pursuit, and the saturation of gambling adverts in the Premier League (the country's most watched sports league) reinforces this perception. Brands associate themselves with the positive emotions and cultural value of football, thereby shaping their own image as positive and acceptable. This is also reflected in the high proportion of ads featuring logos only, designed to seamlessly embed gambling brands into the fabric of football. As a result, the gambling industry has successfully positioned itself as an integral part of football consumption. Research shows that the promotion of gambling through football contributes to both gambling participation and the harms that stem from it (McGee, 2020; Jones et al., 2020; Nyemcsok et al., 2021; Deans et al., 2017).

Our findings further highlight a lack of effective age restriction and harm reduction messaging, with harm reduction messages appearing in only 21.1% of messages. Such limited presence of harm reduction messaging is problematic as it downplays the risks of gambling and reinforces the narrative that it is a normal and harmless aspect of sport. Research has found that commonly used messages such as "gamble responsibly" are ineffective at reducing gambling-related harm and may even be counterproductive (Newall et al., 2023; 2024). Instead, research suggests that harm-reduction messaging should draw on lessons from tobacco and alcohol campaigns and focus on a more diverse range of strategies. These include encouraging specific safer gambling practices (e.g., budgeting, breaks), correcting common misperceptions about chance and control, promoting more reflective decision-making, and using carefully designed norm-based or emotional appeals. Importantly, messages should be evidence-based, audience-specific, and tested for unintended effects, recognising that simplistic slogans risk normalising harmful behaviours or reinforcing stigma (Newall et al., 2023; 2024).

## Continued Failure of Self-Regulation

As in previous years, we identified several failures in self-regulation, with brands either disregarding the rules or the rules themselves being designed in ways that make them ineffective. Key issues include the marketing volume, a reduction in responsible gambling messaging, increase of unlicensed brands, ineffectiveness of the whistle-to-whistle ban, limited effect of front-of-shirt ban, and finally, loopholes in ASA regulations. These issues are examined in detail in the following section.

## The Sponsorship Code of Conduct

*Volume*

The Sponsorship Code of Conduct requires that "the design of gambling sponsorship as part of Gambling Related Agreements limits its reach and promotion to children, and those at risk of gambling related harm" (Premier League, 2024, p. 2). In summary, the code is intended to protect children and vulnerable audiences by reducing the exposure of sponsorship-related marketing and advertising. Last year, our study found that gambling messages increased by 165% despite the introduction of the code of conduct. Our study this year has found that the Code of Conduct has failed to reduce the volume to that uncovered before the Code was introduced. Furthermore, while the total number of messages across the sample decreased by 5.9%, there was an increase in proportion of messages exposed to audiences during the live coverage, such as logos exposed on pitchside hoardings, or stadia structures. These messages are largely exposed to viewers while matches are in play. Although the Code is designed to limit the reach of gambling sponsorship, to truly restrict the exposure to gambling messages on pitchside hoardings would require viewers to stop watching coverage during the time those messages are on screen.

*Unlicenced brands*

Our findings indicate that the Code is also failing to protect against the presence of unlicensed brands advertised in the Premier League. Furthermore, Premier League clubs party to a sponsorship agreement with unlicensed brands may be in breach of Section 1.6 of the Code which states:

> *"Where a Gambling Related Agreement provides consumers in the UK with facilities for gambling, Competitions and Clubs should only enter into agreements where the Gambling Company is licensed by the Gambling Commission or captured as part of a 'White Label Partnership'. In the event that a Competition and/or Club enter into a Gambling Related Agreement with a Gambling Company that is not providing consumers in the UK with facilities for gambling and is therefore not licensed by the Gambling Commission, they must adhere to those relevant requirements under the Gambling Act 2005 that relate to advertising and 'unlawful gambling'" (Premier League, 2024, p. 1).*

As the Gambling Commission (2025) points out, sports organisations who engage in sponsorship or advertising agreements with unlicensed operators are at risk of committing the offence of advertising unlawful gambling under section 330 of the Gambling Act 2005. Although a small proportion overall, 8.59% of the messages exposed during the televised coverage of matches, and 12.08% during the Sky Sports News analysis, advertised brands which are unlicensed to trade within the UK, comparing with 0.0% found last year. This significant growth in the presence of unlicensed brands is due to the departure of TGP Europe from the British market in May 2025 (Gambling Commission, 2025). Indeed, TGP Europe acted as a white label operator, allowing other brands to use its licence to trade in Great Britain. However, despite its departure from the British market, associated brands such as BJ88 and Kaiyun Sport are still being advertised in the Premier League. This is in addition to Everton still maintaining a sponsorship with Stake, despite Stake leaving the British market earlier in 2025, and Everton receiving warnings from the Gambling Commission on the risks of “promoting unlawful gambling websites” (Sky News, 2025). Nonetheless, given that brands associated with TGP Europe are now unlicensed, their presence within sponsorship-related advertising indicates a breach of the Code.

The need to balance regulation to ensure the growth of the regulated market is challenging, and self-regulation such as the Code is often framed as a way to signal brands’ ability to operate responsibly, with notions of over-regulation framed by the industry as increasing the threat of unlicensed operators (Wardle et al., 2021). However, this year’s study has found that the Code - which was co-developed by the Betting and Gaming Council (BGC, 2024) – is failing to address the growth in presence of unlicensed brands.

*Responsible gambling messages*

Finally, the Code also stipulates that “a reasonable and proportionate portion” (Premier League, 2024, p. 4) of sponsorship-related gambling marketing should contain responsible gambling messaging. Whilst certain matches (e.g. Wolves v Manchester City, Manchester United v Arsenal and Leeds United v Everton) did contain slightly higher numbers of harm reduction messages, on average only 12.13% of incidences recorded within the seven broadcast matches contained harm reduction messages. This falls well below the gambling industry’s target of 20% of gambling ads featuring harm reduction messages (IGRG, 2020).

Overall, the study now provides the second set of findings uncovered since the inception of the sponsorship code-of-conduct. Our findings this year highlight the continued inefficacy of the Code, not only in the volume which – despite decreasing – continues to be high while mainly lacking harm reduction messaging, but also in the growth of unlicensed brands.

*Whistle-to-Whistle Ban*

Another example of industry self-regulation is the “whistle-to-whistle” ban, introduced by the IGRG in 2019. The policy was designed to protect children and other vulnerable audiences by prohibiting televised gambling advertisements on television from five minutes before kick-off until five minutes after the final whistle of matches shown prior to the 9pm watershed. Despite being promoted by the industry as an effective safeguard, research indicates that its impact is minimal. This is because the measure applies only to TV commercials, while other, often more influential forms of marketing, such as pitchside hoardings, shirt sponsorship, radio, and social media, remain unaffected. As a result, the regulation does little to meaningfully reduce overall gambling exposure (Rossi et al., 2023; McGrane et al., 2024; Sharman et al., 2024).

Last year we found 39.54% of messages during the live match broadcasts were recorded during the whistle-to-whistle ban. This year, we found 60.79% of messages during the seven live matches were recorded during their whistle-to-whistle ban periods. Despite a small reduction in the total of gambling messages found across the weekend, we found a large increase in the proportion of gambling messages exposed to audiences during live football matches. In summary, the voluntary removal of televised ads is ineffective at reducing exposure to gambling-related marketing and advertising due to wide variety of formats through which gambling brands are advertised during live football. The whistle-to-whistle ban does not apply, for example, to messages on advertising hoardings, or stadia structures.

*Upcoming Front-of-Shirt Ban*

In 2023, Premier League clubs voluntarily agreed to remove gambling sponsorship from the front-of-shirts, starting from season 2026/2027. Despite this, 8.3% of logos were on front-of-shirt in 2024. In this year’s study, gambling brands displayed on the front of players’ shirts accounted for 9.66% of all gambling-related messages, reflecting a slight increase from our previous findings (Rossi et al., 2023; 2024). As with last year, sleeve logos represented a much smaller share, though their presence increased slightly from 0.47% in 2024 to 0.80% in 2025. This indicates that clubs may be shifting exposure to alternative placements, such as sleeves, as a way of maintaining gambling visibility despite the forthcoming front-of-shirt ban. Furthermore, while this voluntary agreement is an acknowledgement by the clubs that gambling marketing may be harmful, this is merely a tokenistic response rather than actually reducing exposure to gambling marketing. By moving gambling logos to alternative placements such as sleeves, clubs are undermining the spirit of front-of-shirt ban, rendering the voluntary code ineffective in meaningfully reducing exposure.

*Social Media Marketing Regulations*

Gambling advertising on social media is formally covered by the CAP Code, overseen by the Advertising Standards Authority (ASA). Yet there are growing concerns that the ASA is not fulfilling its regulatory responsibilities when it comes to gambling advertising. As Lord Foster of Bath, Chair of Peers for Gambling Reform, has recently written to the Gambling Minister, the ASA's continuing failure to protect children from gambling advertising online raises serious questions about its effectiveness (ITV News, 2025).

Two failings are especially troubling. First, the ASA has consistently failed to address the problem of content marketing. Despite concerns first being raised in 2019, the regulator has not issued a single ruling on gambling content marketing up until mid-September 2025 (Burgess, 2025). This is despite mounting evidence, including our own research, that such advertising is four-times more appealing to children than adults, and often not recognised as advertising (Rossi & Nairn, 2022; Rossi & Nairn, 2025). The ASA's position that all posts from brands' owned channels are "generally recognisable as advertising" is directly contradicted by evidence showing that neither children nor adults reliably identify them as such. Even when recognised as advertising, many users do not realise these posts promote gambling, a particularly acute issue given the proliferation of over 1,800 licensed brands (see Gambling Commissions licence register), many with names not obviously associated with gambling. Whilst content marketing now makes up 59% organic ads, and for the first time, also around 9% of conventional ads, the ASA's inaction becomes increasingly concerning.

Second, the ASA has for years allowed a major loophole to persist. Until September 2025, UK-licensed gambling brands with offices registered abroad (e.g. in Malta or Gibraltar) were deemed outside ASA's remit (Burgess, 2025). Although the ASA was repeatedly warned about this loophole, it failed to act (ITV News, 2025). The consequences for consumers are extraordinary: in our study, eight of the ten brands examined on social media fell outside the ASA's remit. This meant that 371 of the 486 organic ads we analysed (76.4%), or 38.1% of all 972 ads over four days, were not covered by ASA regulation. Projected over a year, this equates to around 33,863 gambling ads escaping regulatory oversight - a striking regulatory failure.

# 7 | CONCLUSION AND POLICY RECOMMENDATIONS

Despite the introduction of new self-regulatory measures, including a Sponsorship Code of Conduct and an anticipated ban on front-of-shirt sponsorship, the volume of gambling marketing during the opening week of the Premier League remains alarmingly high. Our analysis recorded 27,440 gambling messages in 2025, only a slight decrease from 2024, but still almost three times the volume seen in 2023. This sustained intensity highlights the deep roots of gambling in football culture and the ineffectiveness of voluntary industry action.

**The key regulatory issues are:**

## 1 Sponsorship Code of Conduct

The Sponsorship Code of Conduct, co-designed by the Betting and Gaming Council (BGC) in 2024, is now in its second year and has seemingly failed in three of its stated aims:

- **Reducing volume:** The opening week of the 2025 Premier League carried 27,440 gambling messages, nearly three times the level seen in 2023. Far from declining, the saturation of gambling marketing in football has become a new normal, suggesting that the Code has not curbed the overall intensity of marketing.
- **Stopping unlicensed brands**: Unlicensed operators accounted for 8.8% of all gambling messages, despite operating entirely outside the UK's regulatory framework. This loophole is striking given that the Code was co-designed by the Betting and Gaming Council (BGC, 2024), underlining the industry's failure to regulate itself. Stronger legislation is therefore not only necessary to protect consumers but also in the industry's own long-term interest.
- **Promoting responsibility:** Responsible gambling messages are in decline across platforms and fall well short of the "substantial share" promised under the Code. Only 12.1% of ads carried such messages, far below the industry's own 20% target.

## 2 The whistle-to-whistle ban

The whistle-to-whistle ban has also shown to be ineffective. Last year, 39.5% of gambling messages during live match broadcasts appeared within whistle-to-whistle periods. This season, the figure has risen sharply; of the 21,805 messages recorded across seven live matches, 13,262 (60.8%) were shown during whistle-to-whistle windows. Rather than reducing exposure, the ban appears to have shifted more gambling marketing into these supposed "safe" periods.

## 3 Front-of-shirt ban

The upcoming front-of-shirt ban (from 2026/27) is unlikely to substantially reduce exposure to gambling messages. Indeed, this year, front-of-shirt logos accounted for only 9.6% of all gambling messages. Gambling brands are mainly present on other formats (for example, pitchside hoardings) that often generate greater visibility during broadcasts. As front-of-shirt logos made up only a small share of total exposure, the ban risks being symbolic rather than effective.

## 4 Advertising Standards Authority (ASA)

The Advertising Standards Authority (ASA) left the majority of gambling ads beyond its oversight. Indeed, eight of the ten brands examined in this study fell outside the ASA's remit due to listing their offices as registered overseas. This meant 371 of the 486 organic ads we analysed (76.4%) – or 38.1% of all 972 ads over four days – were not covered by ASA regulation. Projected over a year, this equates to around 33,863 gambling ads escaping scrutiny, a striking regulatory failure that left millions of children and young people unprotected

## Introduce Legislation on Gambling Marketing

**The evidence is overwhelming: the gambling industry is not capable of effectively regulating its own marketing practices. Neither the "whistle-to-whistle" ban, the front-of-shirt sponsorship ban, nor the Sponsorship Code of Conduct have been shown to have any meaningful impact on reducing the volume of gambling marketing associated with sports consumption. Similarly, the regulations set by the Committee of Advertising Practice have repeatedly failed to address compelling evidence regarding gambling adverts that use techniques highly appealing to children (e.g., content marketing).**

**The persistent failure to implement self-regulation that genuinely protect consumers support to the conclusion that the industry is incapable of doing so. Accordingly, we believe that the government must intervene by introducing comprehensive gambling marketing legislation, following the example of many other European countries. Such legislation should include the following:**

### A A Comprehensive Whistle-to-Whistle Ban

The intention of a "whistle-to-whistle" ban is to prevent high exposure to gambling marketing for sports fans. To be effective, this legislation must cover all forms of gambling marketing, not merely televised ads. This includes all marketing that occurs during sporting events whether through commercials, or as part of sponsorship agreements between operators and football clubs or competitions. A similar approach could be taken to that in the Netherlands, where clubs have been given time to pursue new sponsorship arrangements. The ban should also cover any marketing on platforms that accompanies live events (e.g., social media, radio broadcasts).

### C Ban Content Marketing

Social media has become one of the most effective ways of reaching sports audiences, yet, gambling operators increasingly exploit content marketing to bypass advertising regulations. This type of promotion often blurs the line between editorial and commercial material. Existing evidence demonstrates that such practices undermine advertising safeguards and pose serious risks to children. To address these concerns, legislation should introduce a complete ban on gambling content marketing on social media platforms, supported by clear rules requiring all gambling promotions to be transparently identified as advertising.

### B Centralised Mandate for Responsible Gambling Messages

While responsible gambling messaging is important, the messaging currently implemented by the industry is scarce, and has been proven to be ineffective at preventing harmful gambling behaviours. Legislation should mandate that all gambling marketing includes responsible gambling messages that focus on the potential harms of gambling (e.g., "Chances are you lose" or "Gambling is addictive"). The law should also specify the size, prominence, and duration of these messages to ensure they are clearly visible.

### D Ban unlicensed brands in sponsorship agreements

To protect consumers, all sponsorship and marketing agreements should be restricted to UK-licensed gambling operators only. This would close the loophole currently exploited by unlicensed brands and white-label operators. The fact that the current Sponsorship Code of Conduct was co-designed by the BGC and the Football Association – yet is ineffective in preventing these practices – shows they are not capable of delivering effective self-regulation. It is therefore in the public interest, and ultimately in the sector's own interest, for government to take control of this framework.

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Beacon House, Queens Road, BS8 1QU

**T / 0117 928 9000**
**raffaello.rossi@bristol.ac.uk**
**www.bristol.ac.uk**