EXPLORING THE PREVALENCE OF GAMBLING MARKETING:

An Analysis of the Prevalence of Marketing Across Televised and Social Media Coverage of NBA and NHL in Ontario.

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University of Bristol

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DATA POLICY

FUNDING AND NATURE OF COLLABORATION

TECHNICAL APPENDIX

A technical appendix that includes the code books, full-table results, and other technical information can be requested from the authors.

ACKNOWLEDGEMENTS

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1 | EXECUTIVE SUMMARY

This report details the findings of a joint project undertaken as a collaboration between University of Bristol and CBC News. The project deployed well-established data collection and analytic methods to explore the prevalence of gambling-related marketing on television (as broadcasted in Ontario) and social media during basketball (NBA) and ice hockey (NHL) matches between the 25th and 29th of October 2023. Specifically, we carried out the following main activities:

- The analysis of live televised coverage: We carried out frequency analysis of gambling-related marketing on five NHL and two NBA games between the 25th and 29th of October 2023.
- Social media analysis: We analysed the gambling marketing sent to Canadian audiences across X (formerly known as Twitter) by ten gambling operators between October 25th to October 29th.

Using validated codebooks from previous research, we analysed approximately 21 hours of live game coverage (including studio discussions), and 582 ads posted by ten Canada-licensed sports-betting operators on X (formerly known as Twitter).

HEADLINE FINDINGS

Our analysis found that gambling adverts saturated the media landscape during the investigated NHL and NBA matches. These adverts were found to be ubiquitous across live coverage and social media. More specifically, we found:

4,119

A TOTAL OF 4,119 GAMBLING MESSAGES

A staggering total of 4,119 gambling messages were identified during the observed period. **These messages included brand logos and references seen during televised broadcasts, and posts disseminated on X (Twitter).** This high figure illustrates the prevalence of gambling marketing – making them inescapable for sports fans.

3,537 GAMBLING LOGOS OR REFERENCES TO GAMBLING DURING THE SEVEN GAMES

3,537

We found that 3,537 gambling brand logos or other references to gambling were exposed to viewers in Ontario across the seven games.

93.9%

93.9% OF LOGOS OR REFERENCES DURING THE LIVE COVERAGE WERE FEATURED ON THE PLAYING SURFACE, OR ON ADVERTISING HOARDINGS.

Our analysis found that gambling brand logos or other references to gambling were unavoidable during live coverage, as adverts predominantly featured on the court or rink itself, as well as upon court- or rinkside advertising hoardings.

21.6% OF THE ENTIRE DURATION OF THE LIVE COVERAGE CONTAINED A GAMBLING LOGO OR REFERENCE TO GAMBLING.

21.6%

We found that audiences in Ontario were exposed to gambling brand logos or references across a fifth of the entire duration of the live broadcasts of the seven games, including studio discussions.

2.8%

ONLY 2.8% OF LOGOS OR REFERENCES DURING THE LIVE COVERAGE FEATURED DURING THE LIVE COVERAGE CONTAINED AGE RESTRICTION MESSAGES.

We found that the overwhelming majority of brand logos or other references exposed during the live coverage contained no reference to the minimum age to gamble, while only 2.6% contained any harm reduction messaging.

5.6m

5.6 MILLION VIEWS ON X (TWITTER).

The recorded social media gambling adverts generated a remarkable 5.6 million views (i.e. how many times an ad has been seen) on X only. This data highlights the substantial influence and effectiveness of social media as a platform for gambling advertising.
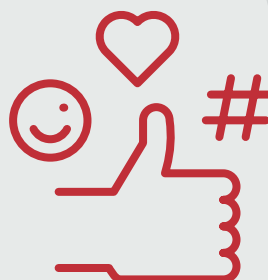
48%

48% OF SOCIAL MEDIA ADVERTS SEEM TO BREACH ADVERTISING REGULATIONS.

48% of social media adverts sent by major gambling brands were not clearly identifiable as advertising – and therefore breaching a key advertising regulation set by the Canadian Code of Advertising Standards.

98%

PEOPLE FEATURED IN SOCIAL MEDIA GAMBLING ADVERTS TEND TO BE MALES AND RELATIVELY YOUNG.

98% of all people featured in social media-based gambling adverts were males, with 79% being aged 18-34. This potentially hints at the industry's target audience.

IMPLICATIONS

Our analysis demonstrates the high level of prevalence of gambling-related marketing in the NHL and NBA. Across the analysis of live messages and social media adverts, we found a significant total of 4,119 gambling messages. The high volume of gambling brand logos found on the playing surface and on court- or rinkside advertising hoardings indicates that marketing was unavoidable during the live coverage, while social media adverts showed substantial reach by generating over 5.6 million views, alongside thousands of shares and likes. Therefore, it can be assumed that children and other vulnerable audiences (for example, including viewers who are experiencing – or are at risk of experiencing gambling harms) are substantially exposed to gambling-related marketing. Indeed, it seems that sports fans are bombarded with gambling marketing across different media channels – making it an inescapable aspect of their sports consumption. On a broader level, we demonstrate that gambling plays a significant role within the NHL and NBA, which is reinforced by studio coverage that was specifically dedicated to sports betting markets. The increasing normalisation was also strongly evident on social media. Whilst 98% of social media adverts had a reference to sports, the majority of adverts used emojis and over one fifth employed humour, which are strategies that further normalise gambling as a fun and harmless activity by hiding its addictive nature. Our findings also demonstrate the inefficacy of regulations in relation to gambling adverts in Ontario. The vast majority of gambling-related marketing analysed is not covered by the current regulations maintained by the Alcohol and Gaming Commission of Ontario. Indeed, the regulation in Ontario – particularly in relation to gambling-related marketing – is still less mature and therefore does little to stem the flow of gambling-related marketing, particularly when compared to extensive regulations maintained in other jurisdictions. It is this relatively relaxed regulation that ensures that operators can deploy a wide variety of marketing techniques when advertising across live NHL and NBA coverage. Additionally, our analysis shows that the Canadian Code of Advertising Standards is ineffective at protecting audiences from advertising disseminated by gambling operators.

2 | **BACKGROUND**

This report details the findings of a joint project undertaken as a collaboration between the University of Bristol, and CBC News. Specifically, the project deployed well-established data collection and analytic techniques to explore the prevalence of gambling-related marketing on television (as transmitted in Ontario) and social media during basketball (NBA) and ice hockey (NHL) matches between the 25th and 29th of October 2023. Additionally, we also critically examined the presence of identified adverts against existing standards which regulate the appearance of gambling-related marketing in Ontario.

Ontario's gambling market has opened considerably in recent years. In June 2021, the Criminal Code of Canada was amended, thus allowing provinces to regulate their own sports betting markets. This initially allowed individual provinces to legally operate and manage their own gambling sectors, ensured the legality of single-sports betting in Canada (Lagerquist, 2021; Holden, 2022) and contributed to the wider availability of online sports betting, including via mobile devices. Provincial governments therefore may wish to regulate and provide a gambling market through provincially-owned operators. For example, gambling can be carried out legally with the Ontario Lottery and Gaming Corporation (OLG) by customers in Ontario, or the British Columbia Lottery Corporation if customers are located in British Columbia. However, Ontario expanded its betting market in 2022, allowing the introduction of single-event bets, as well as opening its gambling sector to private operators based both within and outside of Ontario (Holden, 2022). At the time of writing, 76 private operators were licensed by iGaming Ontario – managed and regulated by the AGCO – to operate in Ontario (iGaming Ontario, 2023).

Relatedly, gambling plays a significant role in the marketing within – or sponsorship of – televised sports in Canada, including the National Hockey League and the National Basketball Association. These sports are amongst the most followed within Canada. A panel survey of 1,705 Canadians found that 30.6% of participants followed ice hockey more closely, although this level varied across provinces or areas of Canada (from 44.7% in Alberta, to 24.3% and 24.2% in British Columbia and Ontario respectively). Basketball, meanwhile, was the fifth most followed sport nationally (5.7%), and the fourth most followed sport in Ontario (7.9%, see Jedwab, 2023). A YouGov survey also found that 60% of Canadian sports fans use television as a means to watch live sport, while 23% of Canadian sports fans use live, online streams (Bruce, 2021). Given the trends demonstrated by Canadian sports fans in the use of television or streaming services to follow sport, businesses may therefore feel there is value in sponsoring an NHL or NBA team or advertising during the broadcasts of matches to advertise to a large audience.

The marketing of businesses via sports can take a variety of forms (Cornwell and Jahn, 2023). Marketing strategies can include – but are not limited to - stadium naming rights, team sponsorship, league sponsorship, event sponsorship, individual athlete sponsorship or as an official supplier. The marketing of gambling during sporting events also blurs the line between spectatorship and participation for the viewer. The shift towards participation can be encouraged through volumes of advertising which can encourage normalisation of gambling at an early age (Pitt et al., 2017; Nyemcsok et al., 2021). Earlier research by Korn et al. (2005) found that Canadian adolescents could recall gambling logos, jingles and slogans from gambling adverts. Gambling-related marketing also normalises the role of sports betting within peer groups (Deans et al., 2016), the positioning of gambling as an everyday activity (Houghton et al., 2023), and the influence of perceptions of skill and knowledge including the gamblers' self-held belief that they can gamble safely (Nyemcsok et al., 2022). Cornwell and Jahn (2023) acknowledge therefore that the marketing of gambling can provide positive and negative consequences. The integration of gambling within sport may enhance the experience for the fan or viewer, but conversely may encourage harmful gambling behaviours. Gambling operators advertising via sporting events will benefit economically from both, as heightened advertising increases participation (Bouguettaya et al., 2020), thus increasing the risk of harm (McGrane et al., 2023). There is also a particular risk to children and young people as interrelation between televised sports and gambling means they may be over-exposed to gambling adverts (Hing et al., 2014).

Nonetheless, gambling has started to play an important role in the enjoyment of sports for many fans in North America, including in the NBA and the NHL. Supporters may, for example, take part in fantasy sports which can involve winning and losing money on the performance of the 'team' of players they pick during a certain game (Sanchez, 2016). Additionally, previous research specifically carried out in relation to the NBA and the

NHL has found that the quality of teams on show and the availability of televised coverage have a significant effect on wagering (Paul and Weinbach, 2010). NBA and NHL fans may decide – if a game is between two evenly matched teams and is televised – to complement their viewership of a sporting event by taking part in sports betting. Gambling operators may therefore take advantage of the popularity of the NBA and NHL events – particularly if they are televised - to target advertising towards sports fans.

Similar trends have been seen in the UK where research focused on association football has highlighted the prevalence of gambling adverts can be seen across a wide variety of formats during televised broadcasts (Cassidy and Ovenden, 2017; Purves et al., 2020; Ireland, 2021; Sharman et al., 2023; Torrance et al., 2023; Rossi et al., 2023). Considering the close interdependence between gambling and sport fandom, and the sudden expansion of sports betting in Ontario, there is a need to explore the prevalence of gambling marketing within major sports events televised in Ontario to consider the potential impact of this on sports fans.

Attention should also be given to the appearance of adverts on social media, given that social media plays a part of everyday life for many. Importantly, the development of social media ensures that sport consumption via mobile devices is common for young people (Yim et al., 2021). Social media is therefore a valuable mechanism for gambling operators to engage with sports fans, and to increase brand awareness (Houghton et al., 2019). Indeed, extant research demonstrates how gambling operators

advertise across social media networks such as X (formerly Twitter. See Killick and Griffiths, 2020; Rossi et al., 2023), while advertising found on social media rarely advises on the harms that can occur from gambling (Killick and Griffiths, 2020; Rossi et al., 2023). Additionally, operators may deploy content marketing – or posts that do not refer to the act of gambling, but are improving the operators' brand awareness, nonetheless – to reach younger audiences (Rossi and Nairn, 2022). Recent research found that gambling-related marketing on X (formerly Twitter) was more appealing to children aged 11-17 and young people aged 18-24, than adults aged 25 and over (Rossi and Nairn, 2023). Therefore, the digitalisation of sports- and gambling-related consumption against the backdrop of deregulation in Ontario, and the wide reach that operators have to young people through social media, all mean that social media is an avenue of marketing that also requires further exploration.

In summary, the liberalisation of sports betting, combined with the increasing interdependence between the gambling and sports industry, means that gambling-related marketing has become a normal part of consuming sport whether through television or on social media. Research is needed to explore just how pervasive gambling marketing is within the televised and social media coverage of the NBA and the NHL in Ontario. To address this, the present study aims to conduct an in-depth analysis of the prevalence of gambling marketing and is guided by aims detailed in the following section.
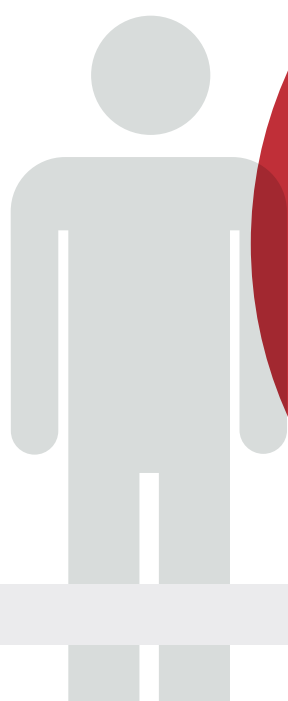
98%
PEOPLE FEATURED IN SOCIAL MEDIA GAMBLING ADVERTS TEND TO BE MALES.
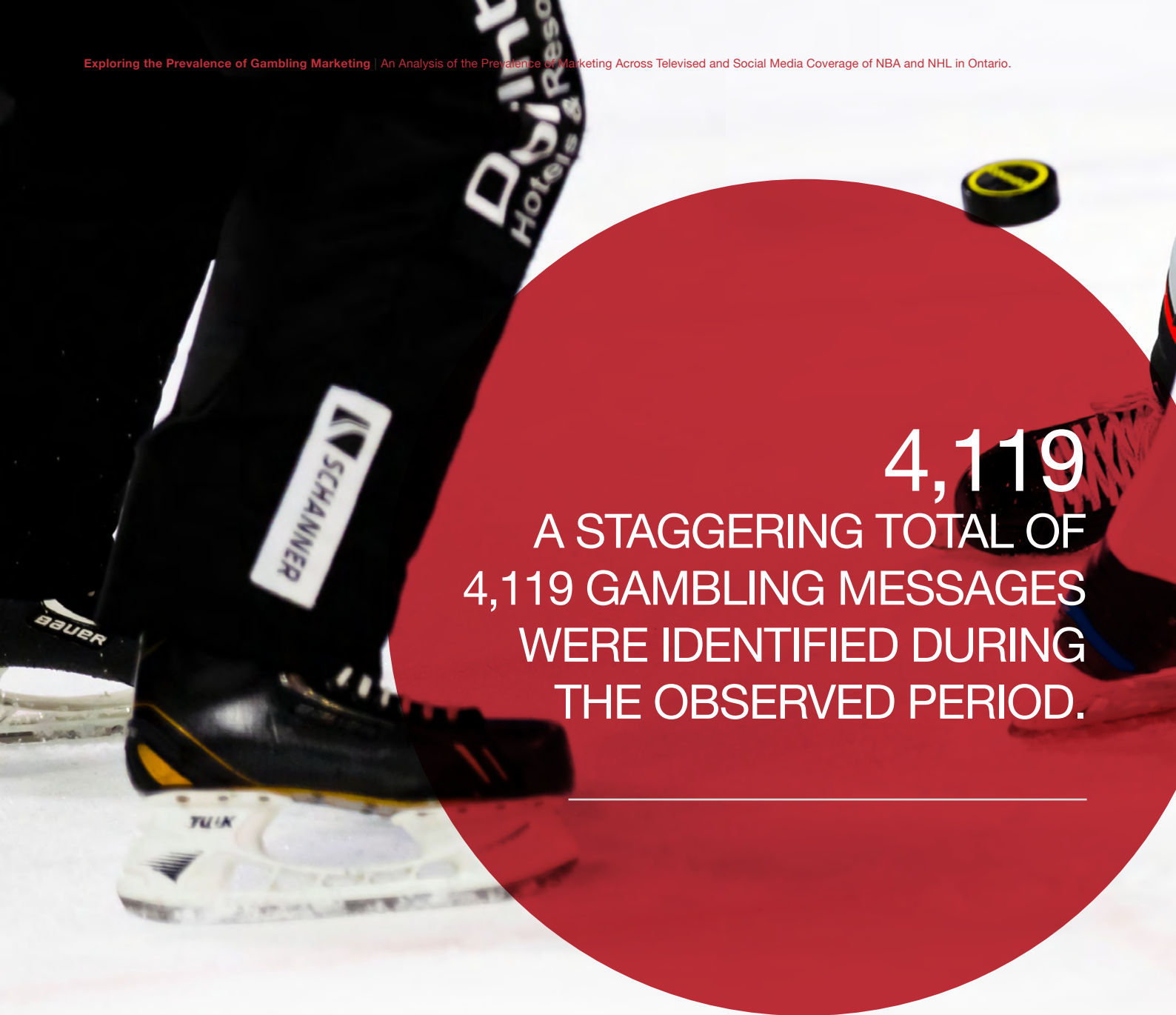
4,119

A STAGGERING TOTAL OF 4,119 GAMBLING MESSAGES WERE IDENTIFIED DURING THE OBSERVED PERIOD.

3 | STUDY AIMS

Reporting the findings of this joint collaboration between the University of Bristol and CBC News, our report aims:

1 To measure the prevalence of gambling marketing across seven NBA and NHL matches televised in Ontario between the 25th and 29th of October 2023.

2 To analyse the prevalence and content of gambling-related social media ads from ten Canadian operators between the 25th and 29th of October 2023.

3 To assess the frequency of advertising highlighted within the first two aims against the current regulatory environment relating to gambling marketing in Ontario.

We begin by briefly outlining the regulation of gambling-related marketing as currently maintained in Ontario. Next, we detail the methodologies followed in our analysis of televised advertising, and social media advertising, before detailing the results which emerged from our research. Finally, within the discussion, we highlight the total of gambling messages – consisting of the total number of logos and references exposed during the televised coverage and the number of adverts seen across social media – found within the sample, discuss the implications of our findings for both the regulations in Ontario, and the wider literature exploring the relationship between sports and gambling.

4 | REGULATION

REGULATION OF GAMBLING-RELATED ADVERTISING IN ONTARIO

Gambling advertising in Ontario must conform to the Alcohol and Gaming Commission of Ontario's (AGCO) Registrar's Standards for Internet Gaming (AGCO, 2023a). The key standards of relevance to this study specifically relate to marketing and advertising, ranging from sections 2.03 to 2.07 of the Standards. Section 2.03 highlights that adverting and marketing "shall not target high-risk, underage or self-excluded persons" to take part in gambling activities. In summary, marketing should not use themes or language that appeals primarily to children, should not be located near schools, or feature minors or other cartoons, role models or celebrities whose primary appeal is to minors. Importantly, gambling should not "extoll the virtues of gambling" to high-risk individuals, nor "entice or attract potentially" high risk players. Additionally, further restrictions will come into force in February 2024, when operators will no longer be able to use athletes to market gambling in Ontario unless they are specifically advertising safer gambling behaviours (AGCO, 2023b). This extra legislation was introduced in response to concerns that the use of athletes within gambling adverts could normalise gambling amongst children, as highlighted by previous research (Thomas et al., 2015).

Section 2.04 requires that all marketing should be truthful, and shall not mislead players or misrepresent products. In summary, operators should not imply that gambling products can help to fulfil family or other social obligations, nor promote gambling as an alternative to employment or as a requirement for financial security. Marketing should also not encourage play as a means of recovering losses, should not present winning as a probable outcome, and they should not imply that the chances of winning increase due to an increase of time or money spent playing, or due to perceived skill. Finally, marketing should not encourage peer pressure to gamble, or suggest that gambling is a rite of passage or can aid personal development.

Gambling inducements are covered within section 2.05. Specifically, advertising and marketing materials that promote inducements, bonuses and credits are prohibited, except on an operator's site and through direct advertising after a player has given consent. Importantly, this standard prohibits all public advertising of inducements, but permits direct marketing such as "direct messaging via social media, emails, texts, and phone calls". Section 2.06 details the requirement for the advertising and marketing of inducements and bonuses. They should, as a minimum, disclose all material conditions and limitations of the offer at its first presentation on the gaming site, with all other conditions no more than one click away; not be described as free if the offer requires the gambling of actual funds, or if there are conditions attached to a players' own money; and must not be described as risk-free if the player needs to incur any loss, or risk their own money, to withdraw winnings from the risk-free bet. Finally, section 2.07 highlights how players must be provided with an opt-in process which allows them to actively consent to receiving any direct advertising and marketing of inducements, bonuses and credits, and must be provided a method to withdraw their consent at any time.

In addition to the iGaming standards set by AGCO, and as with most advertising in Canada, the Canadian Code of Advertising Standards (the Code) applies to the content of iGaming advertising. The Canadian Code of Advertising Standards sets the criteria for acceptable advertising in Canada. Created by the advertising industry in 1963 to promote the professional practice of advertising, the Code is the cornerstone of advertising self-regulation in Canada. The Code is regularly updated to ensure it is current and contemporary. Whilst the Code includes 14 main clauses that advertising must follow – ranging from accuracy and clarity to imitation and advertising to children – Ad Standards, as a self-regulatory body, lacks legal power. Most complaints are resolved by amending or withdrawing the offending advertisement. If an advertiser fails to cooperate, Ad Standards can ask its media members to reject advertisements from the offender, publicly shame the advertiser, or depending on the nature of the infraction, report the advertiser to Canada's Competition Bureau (Asquith and Fraser, 2020). Importantly for this project, Ad Standards (2024) has also stated that "social media posts from branded accounts are considered ads under the Canadian Code of Advertising Standards". The code clarifies that "Advertising" and "advertisement(s)" are defined as "any message (other than those excluded from the application of this Code), the content of which message is controlled directly or indirectly by the advertiser expressed in any language and communicated in any medium (except those listed under Exclusions) to Canadians with the intent to influence their choice, opinion or behaviour" (Ad Standards, 2024).

5 | METHODS

5.1 TELEVISED NHL AND NBA COVERAGE

Our frequency analysis of gambling adverts within the Ontario-based broadcasts of NHL and NBA matches was inspired by similar research into the advertising within other sports. Frequency analyses have been carried out across a range of different sports within a UK-based setting (Purves et al., 2020), and with a focus on those appearing in the broadcasts of the English Premier League (Torrance et al., 2023; Rossi et al., 2023) and international soccer tournaments (Sharman et al., 2023) within the UK. Our study contributes to this literature by focusing on different sporting events, broadcast in a different jurisdiction. The study focused on two NBA games and five NHL games as viewed in Ontario. The frequency analyses of these matches included studio discussions, as well as commercial breaks that occurred during the broadcasts. Some of the games also entered overtime, meaning that the broadcast length of different games varied. The total amount of footage analysed amounted to approximately 21.4 hours. The full sample of games – broadcast between the 25th and 29th October 2023 – is introduced in Table 1. Games were broadcast on Sportsnet One, TSN, CBC, and City TV. The focus of this project was the appearance of marketing displayed in Ontario. These games were transmitted over feeds focused on Ontario, but were available to watch within other regions or provinces of Canada (for further details, see Sportsnet, 2023, TSN, 2018; City TV, 2023).

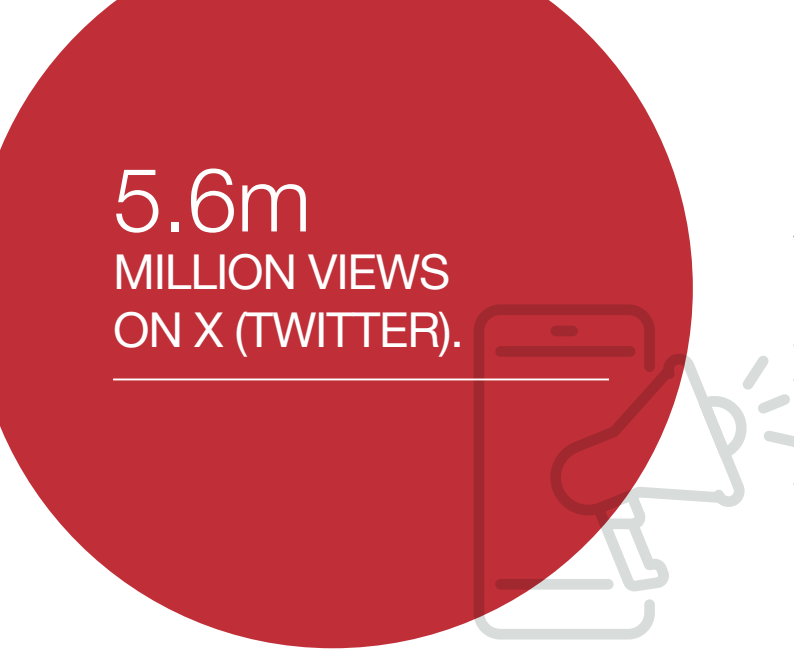Table 1: Details of Analysed Matches

Date	League	Teams	Broadcaster	Length of broadcast
25/10/2023	NBA	Toronto Raptors v Minnesota Timberwolves	SportsNet	177 mins, 5 seconds
26/10/2023	NHL	Toronto Maple Leafs v Dallas Stars	TSN	186 mins, 10 seconds
27/10/2023	NBA	Toronto Raptors v Chicago Bulls	TSN	203 mins, 12 seconds
28/10/2023	NHL	Toronto Maple Leafs v Nashville Predators	CBC/SportsNet	196 mins, 52 seconds
28/10/2023	NHL	New York Rangers v Vancouver Canucks	CBC/SportsNet	155 mins, 33 seconds
28/10/2023	NHL	Winnipeg Jets v Montreal Canadians	City TV/SportsNet	183 mins, 4 seconds
29/10/2023	NHL	Edmonton Oilers v Calgary Flames	SportsNet	183 mins, 36 seconds
			TOTAL	1,285 mins, 32 seconds

To carry out the frequency analysis of gambling marketing, we adapted the codebook from Purves et al.'s (2020) study, which we also used during a previous study focusing on the English Premier League (Rossi et al., 2023). The codebook – the template of which was developed on Excel – included variables that measured how each instance of gambling marketing appeared (for example, the timestamp of the marketing, the format in which it appeared, the number of brand logos). We measured all gambling brand logos in addition to other references to gambling, or references that exposed viewers to gambling that did not contain any gambling brand. We also made further adaptations to the codebook so that variables reflected the NHL- or NBA-specific situations in which each instance of gambling marketing may occur. For example, this included the inclusion of format of 'Spoken instruction', highlighting how gambling-specific discussion may have occurred during the pre- or post-game coverage. The full definitions of variables and codes are available in the Technical Appendix.

Each gambling brand logo or other reference to gambling that was exposed to viewers during the broadcasts was coded individually. For example, if a reference appeared both 'on court' or 'on rink' as well as upon court- or rinkside hoardings, then these were coded separately. This approach allowed us to develop a specific analysis of the presence of marketing across different formats, as well as an accurate picture of the frequency of different brands that were displayed. Each logo or reference was covered per shot. This meant that a logo which appeared on screen would be recorded twice if the camera broke away to a different angle that meant the logo disappeared from the screen. The codebook recorded the maximum number of identical logos or references visible during each shot, similar to the approach taken by Purves et al. (2020). The

5.6m
MILLION VIEWS ON X (TWITTER).

use of this approach – alongside the recording of logos or references per shot – meant that all logos or references exposed to televised audiences were recorded. Our frequency analysis also contained additional analysis using the timestamps of each instance of gambling marketing to explore the total length of broadcast that contained gambling advertising.

Three research assistants were hired at the start of the project to assist the team of main researchers with the coding of logos and references. They received training on the context of the research, the codes and the variables that formed the codebook, and the data entry into the codebook itself. The research assistants then tested the codebook during an intercoder reliability exercise, where the same 20 minutes of coverage analysed by the research assistants were tested for agreement, before differences in coding were discussed. The Krippendorff Alpha coefficient between coders was calculated to analyse agreements between the coders for each of the codebook's variables. The final Krippendorff Alpha readings of between 0.7 and 1 indicated a good level of agreement between the coders. Data collection took place between November and December 2023 at the University of Bristol. Footage of each game was provided by CBC News. As the data were publicly available, ethical approval was not required. Once coding was completed, gathered data were computed for frequency analysis in SPSS.

5.2 SOCIAL MEDIA ANALYSIS

In this study, we utilized a content analysis methodology for social media ads, drawing from the methodologies employed in previous gambling research such as Houghton et al. (2019), Rossi et al. (2021), and Rossi et al. (2023). Our focus was on examining the volume and content of gambling advertisements specifically on X (Twitter). Emphasizing organic ads, our investigation aligned with earlier studies (Houghton et al., 2019; Rossi et al., 2021), concentrating solely on this form of advertising. Organic advertising hinges on the creation of compelling content that motivates individuals to share within their networks. Unlike paid-for advertisements, the reach of organic advertising relies on a brand's follower count and the frequency of post shares or retweets, both of which necessitate creative content generation (Rossi and Nairn, 2022).

Our research dives into both content marketing and traditional advertising techniques within the realm of gambling adverts. Content marketing aims to engage current and potential consumer bases through content that may not directly relate to the advertised product or brand. This method has gained prominence as a form of organic advertising, especially since the advent of social media, and it is widely employed by gambling brands. In the UK, around 40-50% of all social media posts by gambling brands have found to be content marketing (Rossi et al.,

2021, Rossi et al., 2023). Conversely, traditional advertising often highlights financial incentives and favourable odds to incite immediate gambling actions, typically establishing a strong connection between sports and gambling.

To gather gambling adverts, our approach paralleled prior research in gambling marketing (Houghton et al., 2019; Rossi et al., 2021; Rossi et al., 2023), focusing primarily on X, formerly known as Twitter. We specifically targeted the ten largest social media profiles among Canada-licensed gambling accounts, including Bet99, Bet365, BetMGM Canada, BetVictor, FanDuel Canada, PointsBet Canada, Rivalry, Sports Interaction, and The Score Bet. Collectively, these accounts boasted over 82,000 followers. Our data collection involved recording and analysing all ads posted by these ten gambling accounts during the period from October 25th to October 29th. Social media screenshots were provided by the CBC News.

6 | RESULTS

6.1 GAMBLING MESSAGES WITHIN NHL AND NBA COVERAGE

Selected results from the coding exercises of the live televised messages are detailed according to each variable in Table 2 below. Table 2 describes the prevalence of marketing within each game, in addition to the totals found across the entire sample of matches. The full table of results can be found in the Technical Appendix. The number of individual occurrences of gambling-related marketing – for example, each individual row entered into the codebooks by the coders – totalled 2,818 rows across the seven games. Additionally, 3,537 gambling brand logos or other references to gambling were exposed to audiences, leading to an average of 2.8 logos or references per broadcast minute across the seven games.

The total duration of gambling logos or references averaged 39.8 minutes per match broadcast, including studio discussions. Just over a fifth (21.7%, 278.9 minutes of the total duration of coverage analysed contained a gambling-related logo or reference. In summary, every hour of coverage included an average of 13.0 minutes that contained a gambling-related logo or reference. The duration of coverage that contained a reference to gambling varied significantly between matches. The lowest percentage of broadcast covered by gambling advertising was found in the NHL match between Toronto Maple Leafs and Dallas Stars (16.2% of the total broadcast). The highest was found in the NBA game between Toronto Raptors and Chicago Bulls, where over a third (38.5%) of the coverage contained a reference to gambling.

The highest number of individual occurrences on the codebook within a single game, and the highest total of logos visible at any one point during a game were both recorded during the NBA match between Toronto Raptors and Chicago Bulls. Figure 1 below highlights the prominence of gambling brand logos during the game. During some parts, logos were clearly visible when simultaneously appearing on courtside hoardings, on the back of the basketball hoops, on the base of empty seating within the arena, and on the court surface itself.

The end-to-end, fast paced nature of basketball also meant that these logos appeared frequently during the game.

Figure 1. Example of visible marketing during game between Toronto Raptors and Chicago Bulls.

Note: Gambling logos are visible on the court, on advertising hoardings beside the court and on the back of the basketball hope, and on the bottom of empty courtside seating.

Table 2: Selected Results from the Analysis of NBA and NHL games

VARIABLE	Toronto v Minnesota	Toronto v Chicago	Toronto v Dallas	Toronto v Nashville	New York Rangers v Vancouver	Winnipeg v Montreal	Edmonton v Calgary	Total
	NBA				NHL			
Total number of individual entries.[1]	431	582	224	391	298	391	501	**2,818**
Total number of brand logos or other references recorded[2]	453	799	281	581	373	462	588	**3,537**
Average number of brand logos or other references shown per broadcast minute.	2.6	3.9	1.5	3.0	2.4	2.5	3.2	**2.8**
Average duration of brand logos or other references (seconds)	8.6	9.2	8.3	6.8	5.0	4.4	5.8	**6.8**
Total duration of brand logos or other references (minutes)	33.7	78.3	30.2	42.6	24.1	28.4	41.6	**278.9**
Percentage of broadcast featuring a brand logo or other reference.	24.4%	38.5%	16.2%	20.2%	19.7%	16.6%	22.9%	**21.7%**
Most common brands (logos and references)	FanDuel (202) JackpotCity (113) PointsBet (99)	FanDuel (441)	No brand (76) Proline (55) FanDuel (37)	BetMGM (264) Sports Interaction (48)	PlayNow (300)	Mise-o-Jeu (345)	Betway (178) FanDuel (160) PlayAlberta (104)	**FanDuel (979) Mise-o-Jeu (411) PlayNow (304)**
Format (% of logos and references)	On court (48.0%) Stadium or arena structure (48.0%)	On court (62.7%) Other (10.8%) Courtside advertising (8.6%)	Rinkside advertising (55.4%) Other (31.7%) On rink (8%)	Rinkside advertising (57.4%) On rink (35.8%)	On rink (58.7%) Rinkside advertising (30.5%)	On rink (56.3%) Rinkside advertising (39.6%)	Rinkside advertising (60.1%) On rink (35.7%)	**On rink or court (50.4%) Rink or courtside advertising (43.5%)**
Type of gambling referenced (% of logos and references)	Logo Only (98.8%)	Logo Only (87.1%)	Sports betting (43.5%) Logo only (41.5%)	Logo only (84.1%) Multiple (7.7%)	Logo Only (97.1%)	Logo only (96.2%)	Logo only (97.4%)	**Logo only (85.5%)**
Harm reduction message? (% of logos and references)	No (99.1%)	No (98.3%)	No (95.5%)	No (95.4%)	No (97.1%)	No (96.2%)	No (99.3%)	**No (97.4%)**
Age restriction message? (% of logos and references)	No (99.1%)	No (98.3%)	No (94.6%)	No (95.4%)	No (95.3%)	No (95.9%)	No (97.79%)	**No (97.2%)**

[1]Total number of individual entries refers to the number of times a new instance of gambling advertising was logged.
[2]The total number of brand logos or other references includes both logos, and instances when gambling-related references were displayed without logos (for example, sports betting markets).
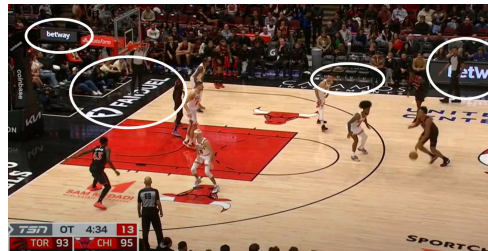
We also found references to gambling where no brand logos were present. These included the appearance of numerous sports betting markets which appeared as part of the onscreen, visual image that appeared during the studio discussion. These odds – as demonstrated in Figure 2 - may primarily intend to inform viewers on the chances of teams winning according to operators, or other markets such as the chance of a certain number of points being scored. However, their appearance – despite being used primarily for information – still references the availability of gambling to viewers. Figure 3 demonstrates an example of sports betting odds that were displayed during the NHL match between New York Rangers and Vancouver Canucks, with the odds

for the game between Edmonton Oilers and Calgary Flames supplied by Sports Interaction. This was a reference that not only informed the viewers on the likelihood of those team winning, but also advertised a specific brand. In addition to the odds displayed on screen, we also found instances of studio discussions such as those which preceded the NBA game between Toronto Raptors and Chicago Bulls. Figure 4 highlights a segment dedicated to betting on the game, 'Setting the Pick', where a presenter discussed statistics related to key players within the match, to develop a same game parlay[1] (see Figure 4) that is displayed to viewers, alongside with the odds of the parlay being successful.

[1] A parlay here could also be referred to as an accumulator, requiring two or more selections to be successful to ensure a winning bet.

Figure 2: Display of Odds During the Broadcast of Toronto Maple Leafs v Dallas Stars

Figure 3: Display of Odds During the Broadcast of New York Rangers v Vancouver Canucks.
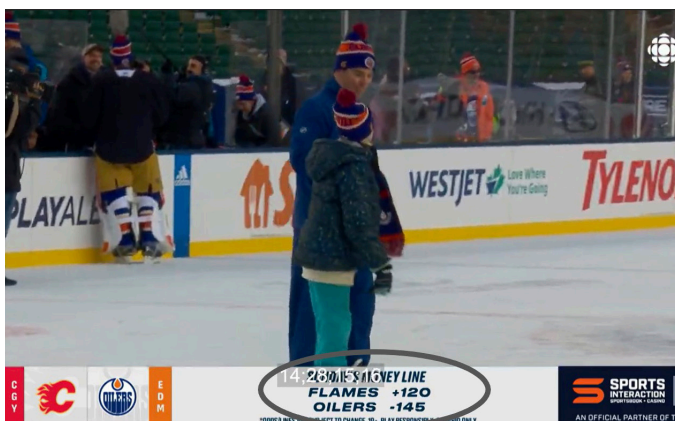
Additionally, the broadcast between Toronto Maple Leafs and Dallas Stars contained lengthy discussions on the subject of Scott Pinto, a player for Ottawa Senators who was banned for 41 games in October 2023 for activities related to sports betting (The Guardian, 2023). Although again not intended as marketing for the gambling industry, these discussions were logged as they indicated the clear relationship between NHL and gambling, and exposed the audience to gambling-related references. In summary, the appearance of odds and the discussion linked to gambling meant that logs were entered into the codebook without any logos being present.

The average duration of each individual appearance of gambling brand logos or references across the sample was 6.8 seconds. The average length of marketing or discussion was slightly longer within the NBA match broadcasts – averaging 8.6 and 9.2 seconds, respectively – compared to the five NHL match broadcasts which ranged from 4.4 seconds (Winnipeg Jets v Montreal Canadiens) to 8.3 seconds (Toronto Maple Leafs v Dallas Stars). The longest average overall (9.2 seconds) was found during the NBA match between Toronto Raptors and Chicago Bulls, attributed to the numerous formats of gambling that occurred during the entire broadcast. The highest NHL-

based average occurred during the match between Toronto Maple Leafs and Dallas Stars can again be attributed to the appearance of odds on-screen during the studio discussion, and discussions related to Scott Pinto.

Thirty-six different brands were recorded during the analysis, as well as "no brand" which reflected the appearance of gambling references (such as betting odds or studio-based discussions) that may not have contained any specific brand. FanDuel was the most prevalent gambling brand across the sample, representing over a quarter (27.7%) of the 3,537 total identical logos or references that appeared across the seven games. FanDuel was the most prevalent brand to appear within both NBA games (44.6% of Toronto-Minnesota and 55.2% of Toronto-Chicago), where it appeared mostly on the court surface. FanDuel was also a prominent brand within the NHL game between Edmonton Oilers and Calgary Flames (27.2%). The second most prominent brand across the sample was Mise-o-Jeu, accounting for 11.6% of the total logos or references across the sample. The majority of the Mise-o-Jeu logos appeared during the NHL game between Winnipeg Jets and Montreal Canadiens, accounting for 74.7% of the logos or references appearing during this single broadcast. The third most prevalent brand was PlayNow, representing 8.6% of total references within the sample. Most PlayNow logos appeared during the NHL match between New York Rangers and Vancouver Canucks (80.4% of match logos or references). Other prominent brands across the sample included BetMGM (7.6% of the total logos or references) and Betway (6.5%). The full list of operators that appeared during the match broadcast can be found within the Technical Appendix.

Figure 4: Example of Setting the Pick, Broadcast During Toronto Raptors v Chicago Bulls

As already demonstrated above, we found brand logos and other references to gambling across a wide range of formats, including the playing surface, court- or rinkside advertising, as part of the stadium or arena structure, adverts shown during commercial breaks, on-screen visual representation of sports betting odds, and studio discussions related to sports betting odds. However, the most prominent formats across the sample were logos that appeared either on the playing surface itself, or on rink or courtside hoardings. These

formats accounted for 93.9% of the total logos and references that appeared across the seven games, with on the court or rink surface being the most prevalent (50.4%) and rink- or courtside hoardings the second most prevalent (43.5%) format. The prevalence of on court- or rinkside marketing reflected the presence of FanDuel, particularly on the court surface during both NBA matches. Courtside marketing during the NBA matches included both the main hoardings that stood courtside, in addition to the smaller electronic hoardings that appeared on the back of the basketball hoops (see the positioning of the Betway logos in Figure 1). Other formats of marketing that occurred during the NBA matches were elsewhere within the stadium or as part of the arena structure, which also included the structure or base of the basketball hoops. The most prevalent formats of gambling logos across most NHL matches were on-rink advertising, and rinkside advertising. Rinkside advertising was used by the coders to highlight different adverts from sponsors that were superimposed onto the rinkside advertising boards during the game when the main angle was shot from the main camera, and singular adverts that appeared during close-up shots. Figure 5 demonstrates an example from the NHL game between Edmonton and Calgary, where Sports Interaction appeared courtside through camera effects. The higher proportion of "other" references to gambling during the NHL game between Toronto Maple Leafs and Dallas Stars reflected the appearance of sports betting odds during studio discussions, alongside references to Scott Pinto's ban due to sports betting-related activities.

The vast majority of logos or references appearing either on court or rink or indeed rink or courtside meant that the most prominent form of gambling advertised was "logo only", where 85.5% of logos or references carried only the logo of operators, and did not make any specific reference to any other form of gambling. There was, however, a difference in the game between Toronto Raptors and Chicago Bulls, where 43.5% of the logos or references referred to sports betting. This higher percentage particularly reflected the appearance of sports betting odds during studio discussions.

Commercial adverts shown during breaks in the coverage represented only 2.7% of the total brand logos or other references found across the seven games. However, the commercial adverts were noteworthy due to the way in which they portrayed gambling. Commercial adverts were deployed by a wide range of operators. For example, BetRivers' advert contained music that highlighted the role of gambling in individuals' everyday lives in a celebratory manner, The Score Bet's adverts included individuals drinking in a bar, highlighting the benefits of The Score Bet app over its competitors, and OLG advertised 'ultimate tickets' which offered a prize of $1 million at reduced odds. Notably, however, commercial adverts featured by FanDuel highlighted the role of sports betting between friends who may have been watching NBA, suggesting that betting offered by FanDuel played a key role in

Figure 5. Example of Rinkside Advertising During NHL Game between Edmonton and Calgary

watch parties held between friends. An example of this advert can be found in Figure 6. Operators also used commercial adverts to highlight their legitimacy as official betting partners of different sports (for example, BetMGM as official partners with the NHL, or DraftKings as the official betting partner with the NFL).

We also found a small number of commercial adverts that featured celebrities or professional athletes. Commercial adverts by BetMGM featured Jamie Foxx, while commercial adverts by Sports Interaction – introduced in Figure 7 - featured hockey players Mitch Marner and Leon Draisaitl playing a series of games, presented to the audience as fun, light-hearted activities which could be marketized for the purposes of sports betting. Given that Marner and Draisaitl are athletes, this advert would not be permitted after February 2024 when operators will not be allowed to use athletes within their marketing unless they are promoting responsible gambling behaviours (AGCO, 2023b). We also found a small number of commercial adverts which promoted these behaviours. Figure 8 demonstrates a commercial advert also provided by FanDuel that revolved around the use of responsible gambling behaviours. This advert portrayed gambling as a normal activity, while also encouraging viewers to take responsibility for their own gambling.

Figure 6: An example of FanDuel's commercial advertising.

**Figure 7: An example of Sports Interaction's Commercial Advertising**

Additionally, 97.4% of brand logos or references to gambling contained no mention of any harm reduction message, while 97.2% of logos or reference to gambling contained no mention to any age restriction messaging. Age restriction and harm reduction messages were generally confined to commercial breaks or on-screen captions when gambling brands were advertised either during studio discussions or during match coverage. Harm reduction messages were generally brief, and encouraged gamblers to take responsibility for their own gambling behaviour, such as "Play Responsibly" or "Always Play Responsibly". However, we also found brief messaging in some examples that advised viewers on the risks of gamblers. For example, Figure 9 demonstrates how televised advertising from Sports Interaction contained messaging stating that "Gambling can be addictive", alongside a contact number for Connex Ontario for those who may be experiencing gambling harms. The contact number of Connex Ontario accompanied all harm reduction messaging found across the seven games. Figure 9 also demonstrates an example of a "19+" message, reflecting the minimum age required to engage in online gambling (with the exception of lotteries and bingo) in Ontario.

Figure 8: An example of FanDuel's Responsible Gambling-themed Commercial Advertising

Figure 9. Example of harm reduction messaging within commercial advert from Sports Interaction.
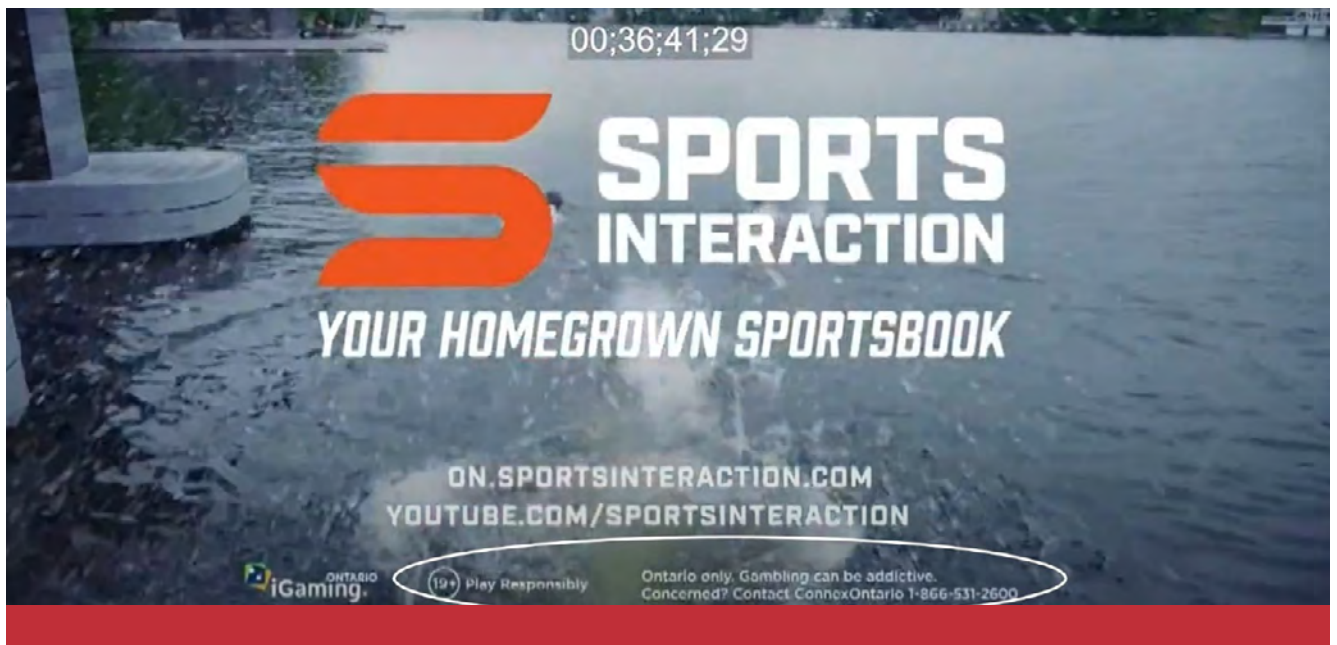
6.2 SOCIAL MEDIA

Between October 25th and October 29th, 2023, our study recorded a total of 582 gambling adverts shared by the ten examined, licensed betting brands. These brands collectively commanded an audience of over 82,000 followers. Although this report is primarily focused on NHL and NBA coverage, some adverts that are not related to the NHL or the NBA are included as they may have been exposed to NHL or NBA fans during the study period. Among the observed ads, 48.6% (283 ads) were categorized as content marketing (see section 5.2 for details), while the remaining 51.4% (299 ads) were classified as conventional ads. Further details regarding the breakdown of content marketing and conventional ads can be found in the appendix. Table 3 summarized our analysis of the 582 gambling ads posted on X.

Table 3. Overview of our analysis of social media gambling ads.

| Code	Definition	Total
Extra-message information		
Likes	How many likes do the adverts have?	7,294 (avg. 13)
Shares	How many shares do the adverts have?	1,243 (avg.3)
Impressions / Views	How many times have the adverts been viewed?	5,687,087 (avg. 9,771)
Marketing Design		
Gender included	Which gender were the people pictured in the adverts?	Only male: 457 (70%) Only female: 1 (0.1%) Both male and female: 10 (1.9%) None: 114 (20%)
Ages	What ages were the people pictured in the adverts?	18-24: 76 (13%) 25-34: 294 (51%) 35-44: 48 (8%) >44: 13 (2%) Mixture: 33 (6%) None: 114 (20%)
Use of Emojis	Adverts that used Emojis.	514 (88%)
Use of humour	Adverts that use humorous content.	132 (22%)
Insider / Expert	Ads that give the feeling of being a insider/expert.	371 (63%)
Topical References		
Celebrity	Adverts that featured celebrities (that are not primarily known for being active sportspeople).	34 (6%)
(Famous) Sportsperson	Adverts that featured (famous) sportspeople.	430 (74%)
Reference to sports	Adverts that included a reference to sports.	570 (98%)
Ethical practice & Advertising Regulations		
Age restriction	Ads that make reference to the age restricted nature of gambling.	111 (19%)
Harm reduction messaging	Ads that include a harm reduction message.	110 (19%)
T&Cs stated	Ads that include information on the T&Cs.	0 (0%)
Disguised Advertising	Ads that were not clearly identifiable as advertising (Ad Standards Code 2).	282 (48%)

6.2.1 ENGAGEMENT

The 582 ads generated significant engagement, accumulating 7,294 likes, 1,243 shares, and a notable 5.6 million views or impressions. Whilst these are impressive numbers, it is important to note that our investigation did not capture the entire landscape of gambling ads, since we only focused on organic ads. In our previous research into the UK gambling marketing, we also included paid-for ads, which more than doubled the volume of gambling ads during the observed period (Rossi et al., 2023). Additionally, our focus remained solely on X, omitting other major social media platforms such as Facebook, Instagram, or TikTok. Exploring these platforms would likely have resulted in even higher ad numbers and levels of engagement.

One problematic strategy employed by certain accounts involved commenting on posts by larger accounts. This tactic resulted in the gambling account's post being showcased to the followers of the larger account. This practice raises concerns as users engaging with non-gambling content are inadvertently exposed to gambling advertising. For instance,

Rivalry, an esports betting account, commented on a post by the League of Legends Esports account (@lolesports) which has over 2.5 million followers (see left ad in Figure 10). Given that League of Legends typically attracts a young audience with an average player age of 21.2 years old (ESPN, 2017), it is reasonable to assume a similarly youthful followership on X (Twitter). Consequently, this means that numerous - potentially underage - users may have been exposed to the Rivalry gambling ad. Remarkably, this ad generated 10,800 impressions, marking it as one of their most successful posts.

Another comparable instance involved FanDuel Canada and the Toronto Raptors (see Figure 10). FanDuel's X account was linked in a post by the Toronto Raptors, subsequently shared by FanDuel. Similarly troubling to the previous example, this led to numerous users - potentially disinterested in gambling - being exposed to gambling-related content or accounts. Comparable to the success experienced by Rivalry's aforementioned post, this post was among FanDuel's most successful, accumulating around 60,000 views.

Figure 10. Below left: Ad by Rivalry which was commented on the LOL Esports account – potentially targeting children and young persons. **Below right: A post by the NBA Toronto Raptors account that tagged FanDuel Canada, and was shared by FanDuel.**
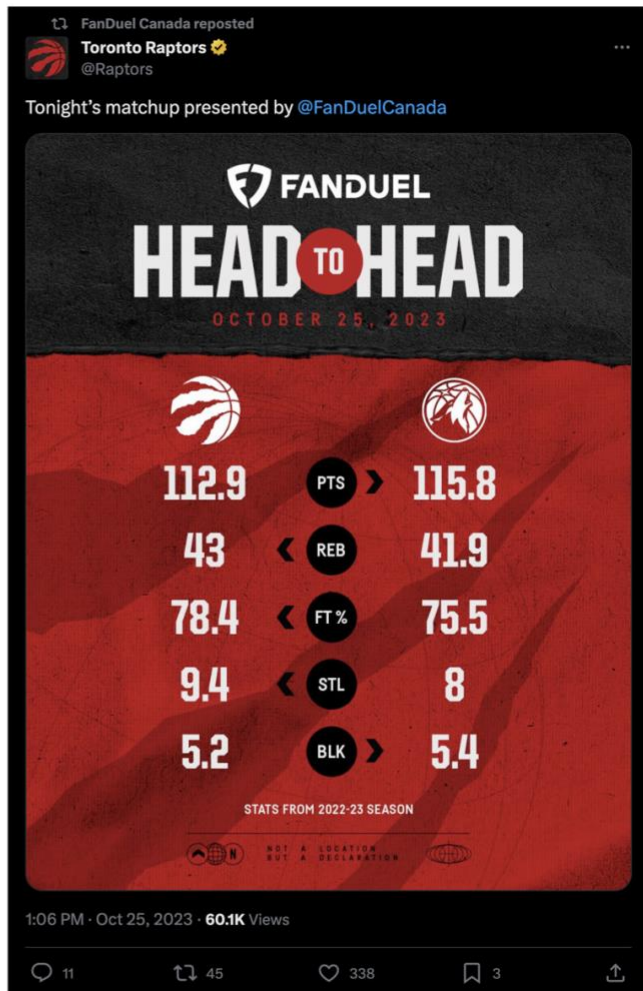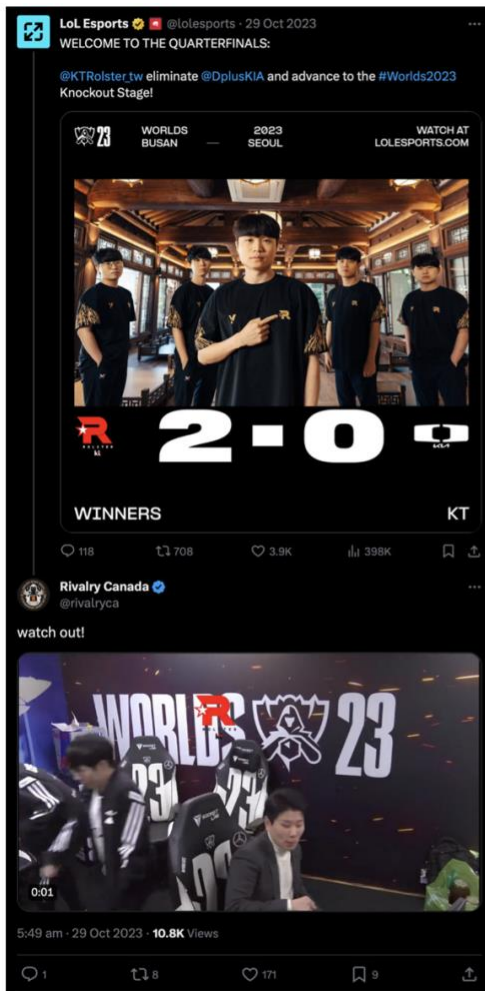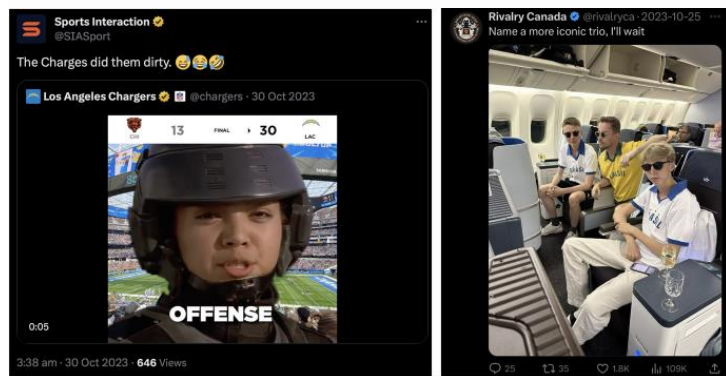
6.2.2 INCLUDED INDIVIDUALS

In examining the individuals that are featured in the ads, it is evident that gambling advertisements predominantly featured only males, accounting for 98% of all 468 individuals showcased. Additionally, a significant majority (79%) of those featured in these ads fell within the age bracket of 18 to 35 years old. This presumably demonstrates who the advertisers believe to be their target audience. However, this overrepresentation of men in gambling ads creates an implicit perception that gambling male-orientated activity. Such a portrayal could potentially perpetuate a misconception among viewers. Notably, this disparity is concerning as research highlights young men as a particularly vulnerable group concerning gambling-related harms (Department for Culture, Media & Sport, 2023).

Furthermore, there are instances, as depicted in Figure 11, where individuals featured in these ads were minors or very young adults. Specifically, the two young esports athletes featured in the ad by Rivalry are likely to have an appeal to minors (see Rossi et al., 2021). This practice raises significant ethical and legal concerns regarding the targeting and portrayal of underage individuals in gambling advertisements.

Figure 11. Social media adverts from Sports Interaction and Rivalry.

Specifically, an ad by Sports Interaction including a minor, and an ad by Rivalry featuring two young esports players with a probably high appeal to minors.

Finally, our analysis of the individuals included in the ads found that 6% of the ads featured celebrities. It is important to note that this percentage does not encompass instances where famous sportspeople were showcased (observed in 74% of cases). Instead, this figure pertains to the inclusion of other renowned individuals or famous sports personalities portrayed outside their sporting contexts. Figure 12 showcases two examples illustrating this point. Specifically, the example on the right vividly demonstrates the use of celebrities in an attempt to mitigate the serious and problematic nature of gambling. The depiction features a scene from Scarface where Al Pacino, in character, is engaged in a conversation on the phone with a colleague who appears to be counting a significant amount of money. The caption accompanying

this clip reads: "Zach LaVine over bettors tonight," effectively linking betting to wealth generation and enjoyment.

Figure 12. Adverts by The Score Bet showing celebrities.

The left one shows Kevin James form The King of Queens wearing a Chicago Blackhawks (NHL) jersey, and the right one shows Al Pacino in a sequence from Scarface with reference to an NBL player called Zach LaVine (see https://twitter.com/theScoreBet/status/1718436869858283845?s=20).

6.2.3 NORMALIZATION

During the analysis of the 582 Canadian social media gambling ads, we have noticed that the prohibition of bonuses and inducement offers within Ontario for non-direct gambling marketing seems to have inadvertently steered gambling ads on social media toward a more discreet and seemingly innocuous approach. Whilst social media gambling adverts in Germany (see Singer et al., 2023) or the UK (see Rossi et al., 2023) tend to focus heavily around inducements and bonuses (for example, sign-on bonuses, VIP-offers, happy hours, odd boosts) – which gives the ad a clear call to action – this is vastly absent in Canada, making the ads more stealthy and seemingly harmless. This shift potentially masks the addictive nature of gambling behind light-hearted and entertaining content. One example, is the vast use of emojis (88%) in their ads, with emojis featured in 88% of the ads analysed. This significant usage of emojis use suggests a deliberate attempt to amplify visual appeal and establish an emotional connection with viewers, as noted by Valenzuela-Gálvez et al. (2023). Moreover, our analysis found that 22% of the analysed gambling ads employed humour, leveraging memes or making witty remarks about sport-related scenarios, often mocking certain (primarily sport-related) situations. Figure 13, for example, demonstrates how humorous posts while featuring celebrities or popular culture (such as The Office) or athletes (Dwayne Johnson featuring as 'The Rock').

Figure 13. Two adverts by The Score Bet using humour and popular culture. The left one a screenshot from The Office, and the right one shows a gif with Dwayne Johnson with references to the NBA's New Orleans Pelicans.

We also found that around 63% of all ads used insider and expert sentiments. This practice has been observed in previous research (see Rossi et al., 2021, Rossi et al., 2023). This practice aligns with findings from prior research (Rossi et al., 2023) and raises concerns in relation to their impact on those who engage with the ads. Firstly, this practice fosters a sense of exclusivity among consumers, creating a perception of being part of an inner circle capable of deciphering encoded messages. Secondly, this practice can inadvertently convey an illusion of expertise in gambling, blurring the line between informed decision-making and impulsive actions. Whilst both examples within Figure 13 imply some insider knowledge, more betting related examples can be found in Figure 14, where posts from The Score Bet and Sports Interaction encourage the viewer to actively engage with the post and predict Victor Wembanyama's NFL debut.
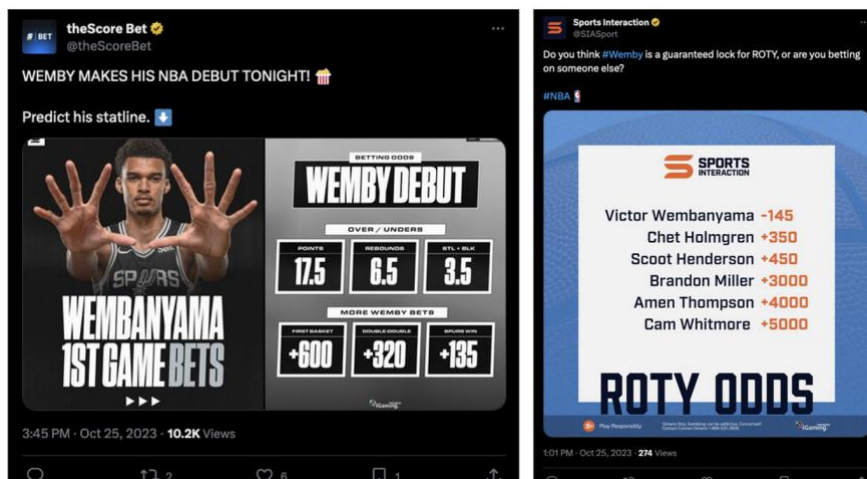

Figure 14. One ad by The Score Bet, and one by Sports Interaction, both with references to NBA games.

6.2.4 DISGUISED ADVERTISING

As mentioned earlier, in Ontario, gambling marketing legislation prohibits bonuses and inducements for non-direct marketing. However, a potentially unintended consequence we noticed on social media as operators are not permitted to offer bonuses or inducements, is that many gambling ads are not clearly identifiable as marketing. Alarmingly, 48% of the ads were deemed not clearly identifiable as advertising, thereby violating the Canadian Ad Standards Code 2 (Ad Standards, 2024). This code explicitly states that "No advertisement shall be presented in a format or style that conceals the fact that it is an advertisement". Notably, all of the ads that seemed to breach this code fell under the classification of content marketing—a contemporary technique aiming to engage consumers through content not overtly related to the promoted product or brand (see methods for more details).

A key concern around content marketing is that it is difficult to recognise as advertising. This observation aligns with recent findings by Rossi and Nairn (2021). They argue that individuals, particularly children and young adults lacking advertising recognition skills, face considerable challenges in discerning the commercial nature of such content marketing.

Consequently, this leaves them vulnerable to persuasive attempts. Most jurisdictions have an advertising code in place to prevent ads that exploit our recognition limitations, thereby safeguarding individuals.

Whilst it is sometimes wrongly claimed that content marketing is not a form of advertising as it lacks a call to action, the Canadian Ad Standards (2024) – as a reminder from Section 4 - clarified that "social media posts from branded accounts are considered ads under the Canadian Code of Advertising Standards". The code clarifies: "Advertising" and "advertisement(s)" are defined as "any message (other than those excluded from the application of this Code), the content of which message is controlled directly or indirectly by the advertiser expressed in any language and communicated in any medium (except those listed under Exclusions) to Canadians with the intent to influence their choice, opinion or behaviour." (Ad Standards, 2024).

We only deemed ads breaching this code if they: **a)** did not include any gambling-related terms (e.g., odds, moneyline, over/under betting), **b)** omitted a website link, and **c)** did not incorporate gambling-related imagery. We judged a post as identifiable as an ad if it contained any of the three above elements (however small or minor). For those ads that did not include any of the above, recognition of these posts as ads would solely rely on identifying the brand that posted them. This dilemma arises because children and young individuals should remain unaware of gambling brands. In general, many brands have names not explicitly linked to gambling (for example, Rivalry, Sports Interaction, FanDuel, PlayNow) and it cannot be reasonably expected for consumers (especially underage or young people) to know the potentially hundreds of thousands of brands that advertise online. Examples of ads that breached Code 2 can be found in Figures 10, 11, and 13. For example, Rivalry's reply to LOL ESport in Figure 9 was referenced to the original post made by LOL ESport, while neither post by Rivalry or Sport Interaction in Figure 10, nor the posts by The Score Bet in Figure 12 made any reference to gambling.

Beyond these ads that we classified as breaching Code 2, we found that most other ads are also difficult to spot as advertising. Often, the only giveaway was a small "O" (referring to "over" – a sports-betting related term). Given the quick pace at which people browse their social media feeds, it is highly improbable that they recognize exposure to a gambling ad. Figure 12 shows

two examples of ads that we classified as not breaching Code 2, but were still hard to recognize as advertising. None of the ads had any "advertising" labelling, similar to influencer marketing, which would help to identify their persuasive intent. As described earlier, we feel that compared to similar analyses conducted in Germany (Singer et al., 2023) or the UK (Rossi et al., 2021; Rossi et al., 2023), social media gambling ads in Canada appear more discretely. This is a worrying trend – especially for young people and children – who are potentially exposed to gambling advertising regulatory, without even noticing.

6.2.5 LACK OF AGE RESTRICTIONS AND HARM REDUCTION MESSAGING

Only 19% of the ads examined contained an age restriction, while only 19% featured a harm reduction message. Notably, these messages, when present, often appeared significantly small or were concealed within a variety of other information, rendering them challenging to notice or read, as demonstrated in Figure 15. The absence of warning labels in 81% of the ads not only contributes to the problem of disguised advertising but may also contribute to the normalization of gambling. This absence reinforces the perception of gambling as a seemingly "harmless" activity, as highlighted in previous studies (see McGee, 2020; Nyemcsok et al., 2021).

Figure 15. Adverts by BetMGM Canada, and FanDuel Canada. Both ads include harm reduction messages and age warnings which are very small.
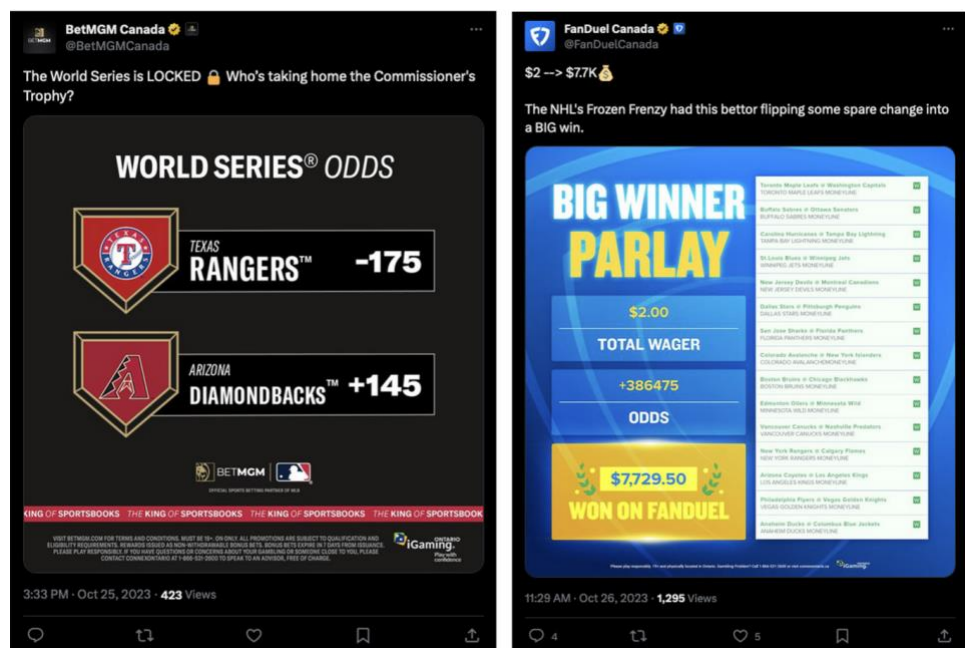
7 | DISCUSSION

Our findings highlight the close relationship between the gambling industry, the NBA and the NHL, with 4,119 gambling-related messages analysed during the seven games and social media posts disseminated during the study period. **This total consists of the gambling brand logos and other references to gambling exposed within the live coverage, and the adverts disseminated by operators on X.** The multi-channel marketing approach employed by gambling brands means that sports fans are bombarded with gambling marketing across different media channels – making it an inescapable aspect of their sports consumption. These findings generate implications for both the gambling- and marketing-related literature, as well as the regulation of gambling-related marketing. Specifically, our findings highlight the significant role – and possible normalisation – of gambling in the NBA and the NHL, reinforced by a wide variety of advertising techniques, and the inability of regulations to reduce the high volume of advertising experienced across both television and social media.

7.1. THE NORMALISATION OF GAMBLING THROUGH ADVERTISEMENT AND MARKETING TECHNIQUES IN LIVE SPORT

The normalisation of gambling through the sponsorship and advertisements by operators has been well documented globally (Hing, 2014; McGee, 2020; Nyemcsok et al., 2021). This longstanding and close relationship between sport and gambling is significant, given that marketing and advertising plays a role in influencing attitudes and societal norms (Deans et al., 2016; Pitt et al., 2017), and in turn impacts behaviour (Bouguettaya et al., 2020; McGrane et al., 2023). The high volume of gambling-related marketing that occurs within sport poses a particular risk to young people whose perceptions may as a result feel that sport and gambling are aligned (Pitt et al., 2017; Nyemcsok et al., 2021), while gambling may become a normalised aspect of sports fandom, reinforced by the digitalization of gambling and sports which can also lead them to become further intertwined (McGee, 2020). Clemens et al. (2017) also highlight a strong and consistent association between the exposure to gambling ads and several gambling behaviours maintained by adolescents, thus resulting in a greater likelihood of experiencing gambling harm. A recent systematic review, furthermore, confirmed that "greater (gambling) advertising exposure increases participation which leads to a greater risk of harm" (McGrane et al., 2023, p. 124), particularly for children and young people. This demonstrates that even though adverts may not be directly targeting children and young people, their proliferation can still influence gambling attitudes and intentions.

Nonetheless, gambling-related marketing demonstrated a strong presence across the broadcasts of the seven games, with 3,537 gambling brand logos and references analysed. These logos and references represent an example of sponsorship via sport, thus reaching large audiences formed by sports supporters (see Cornwell and Jahn, 2023). This level of advertising represents the embedding of gambling within sports fandom as a harmless leisure activity (Nyemcsok et al., 2021), and also may also encourage gambling behaviour (McGrane et al., 2023). The close relationship between televised sport and gambling is a global concern, as found within the research of gambling adverts in association football (Purves et al., 2020; Ireland, 2021; Rossi et al., 2023; Sharman et al., 2023; Torrence et al., 2023). For example, Torrance et al. (2023) found 20,941 gambling-related logos across 10 match broadcasts and Rossi et al. (2023) found 10,999 gambling-related messages across six broadcasts during the opening weekend of the Premier League season. Adverts across this research were mostly concentrated on players' shirts and pitchside hoardings. Within this project, we found that just over half (50.4%) of all televised logos and references appeared on the playing surface itself, while 43.5% appeared on court or rinkside advertising hoardings. This demonstrates how gambling-related marketing is unavoidable as high volumes of advertising is presented while play is ongoing. However, our findings also demonstrate that gambling-related marketing in the NBA and NHL is made more prominent to viewers in other ways, as evidenced by the overall duration of references to gambling marketing which averaged 38.9 minutes per match broadcast.

For example, the use of sports betting markets as a primary mechanism to inform viewers on the expected chance of teams winning further demonstrates the relationship between gambling and the NHL and NBA. However, the appearance of – and studio discussion dedicated to – sports betting odds could further align sport and gambling for underage and vulnerable audiences, implying that gambling is a normal part of sports consumption, and blurring the lines between programmes and commercials. Discussion that openly highlights the possibility of certain bets occurring to

viewers not only further normalizes and endorses sports betting, but encourages viewers to place bets as they feel well informed which can foster the illusion of control in sports betting (Lopez-Gonzalez et al., 2018). While this discussion may not openly breach the AGCO regulations as long as it does not discuss the certainty of bets being successful, the appearance and discussion of sports betting markets may lead to further gambling, considering that the broadcast of matches can already carry an effect on wagering (Paul and Weinbach, 2010). Such discussion can also impact on viewers' illusion of control which in turn could influence gambling behaviour (Lopez-Gonzalez et al., 2018).

Televised, commercial adverts also portrayed gambling as a normal, social activity, celebrated through adverts that depicted gambling undertaken by people across a wide variety of settings (BetRivers), adverts that contained NHL players playing other games that could theoretically be wagered upon (Sports Interaction), or adverts that portrayed gambling as a normal activity that is carried out between friends watching sport (FanDuel). While these adverts formed a small number of logos and references across the sample of seven games, they provide further evidence of advertising that normalises gambling as a normal peer group activity (Deans et al., 2016), and as an everyday activity (Houghton et al., 2023).

In our exploration of social media, we discovered a profound intertwining of gambling advertisements with sports. In fact, 98% of the ads we scrutinised were linked to sports, with 74% of ads including (famous) sports personalities. The distinction between sports-related content, such as sports news, and gambling advertising also became significantly obscured. This practice was reinforced by the practise of gambling brands engaging in commentary and reposting ads by sport clubs, along with the tagging of sports clubs or famous sportspersons within the ads, potentially further normalising the link between gambling and sports consumption (Lopez-Gonzalez and Griffiths, 2017).

In addition to the normalization of gambling within the realm of sports, our research revealed the substantial contribution of social media marketing in portraying gambling as a "normal" and seemingly innocuous activity (Nyemcsok et al., 2021). Notably, we feel that compared to similar analyses conducted in Germany (Singer et al., 2023) or the UK (Rossi et al., 2021; Rossi et al., 2023), social media gambling advertising in Canada appears more stealthily. This subtlety could possibly stem from the unintended consequences of Ontario's ban on bonuses and incentives in non-targeted marketing. Accordingly, we found that 48% of these ads masked their commercial and gambling-related nature through the use of humour and seemingly unrelated content,

often presented in the form of content marketing. Despite promoting an addictive and potentially harmful product, such advertising tends to appear inconspicuous, innocent, and harmless. The use of humor, emojis, or memes in this type of advertising is less likely to trigger feelings of caution amongst those engaging with the post. Therefore, the processing of this advertising is likely to occur unconsciously, leaving the recipient unable to formulate a mental counter-argument (Nairn and Fine, 2008). This insidious approach raises concerns about its long-term effects, as articulated by Rossi and Nairn (2023), particularly regarding the potential impact on children and young individuals exposed to these ads. There is a worry that such exposure could prime them to perceive gambling as enjoyable, harmless, and an ordinary part of life, potentially setting the stage for a lifetime struggle with gambling-related harms.

Additionally, we found little messaging advising on the risks associated with gambling or the minimum age required to gamble in Ontario. Indeed, 97.4% of the logos or references found within the televised coverage contained no harm reduction messaging, while 97.2% of gambling marketing included no reference to the minimum age to gamble. The social media analysis found that 81% of adverts included no harm reduction messaging nor reference to the minimum age to gamble. There are no requirements within the AGCO's (2023a) standards related to marketing and advertising (sections 2.03 to 2.07) for operators to display any harm reduction or age restriction messaging, only for advertising and marketing not to be aimed at underage or "high-risk" persons, and for gambling to be portrayed as truthful. Nonetheless, the lack of harm reduction messaging poses a risk given the normalisation of gambling that is evident. Harm reduction messaging that was encountered varied from "Always play responsibly" to "Gambling can be addictive". While there was at least a minimal amount of harm reduction messaging, messages that encourage viewers to gamble responsibly are industry-friendly in their negating of the risks of gambling products (Livingstone and Rintoul, 2020), and normalise gambling as a social activity while negating the risks involved (Parke et al., 2014).

In the present study, while the adverts may not be directly targeting children, vulnerable or high-risk groups in line with section 2.03 of the AGCO standards, considering the popularity of the NBA and NHL, it is highly likely that children and vulnerable groups will be amongst the diverse group of viewers. Therefore, the high exposure of gambling adverts during these televised events is problematic, especially considering the disproportionately low harm reduction messaging which could influence the attitudes, beliefs and behaviours of young people as well as adults.

7.2 COMPARING REGULATIONS IN ONTARIO WITH OTHER JURISDICTIONS

Our research found that adherence with the existing marketing and advertising standards maintained by the AGCO (2023a) was less of an issue than the standard's ability to effectively regulate the current volume and forms of advertising found in the live coverage of the NHL and NBA. Compared to other jurisdictions (see below), it appears that the existing regulations are not fully developed and might fail to prevent gambling related harms via marketing. Indeed, the vast majority (85.5%) of logos and references we uncovered during the televised coverage consisted of only the logo itself, and this does not breach the AGCO's standards. Although we found high volumes of advertising that appeared during live games that were likely viewed by underage and other vulnerable persons, and a small number of adverts that contained NHL players (see Figure 6) or celebrities, it could be argued that they did not specifically target underage or vulnerable persons (see AGCO, 2023a, section 2.03).

Additionally, while sports betting markets were displayed during studio discussions, and while there were studio discussions were dedicated to sports betting, marketing did not misrepresent products nor mislead players (section 2.04), nor include any gambling inducements, bonuses or credits (sections 2.05 and 2.06). Section 2.07 is concerned with the opt-in process that operators must provide to players to consent to receiving any direct advertising. Moreover, whilst social media advertising was found to be generally problematic by hiding the potential negative effects of gambling behind humorous, insider-driven and stealth content, this behaviour would not breach any regulations set by AGCO. The ban on adverts which feature athletes due to come into force in February 2024 (AGCO, 2023b) would not address the overwhelming majority of televised logos or references analysed within the sample of seven matches. This ban, however, would somewhat affect the way social media gambling advertising operates; 74% of the social media ads analysed in our study featured sports athletes in their advertising.

Ontario expanded its gambling market in 2022, and while advertising has proliferated, the regulation which is designed to protect against harms from marketing and advertising has not kept pace with the growth in the industry's advertising. Ontario's regulations are also considerably less protective than those which can be found within other jurisdictions. For example, jurisdictions across Europe are beginning to see tighter regulations in relation to gambling operators sponsoring televised sports events. For example, in Italy, gambling-related marketing was prohibited by the Government in 2019 (Il Presidente della Republicca, 2018). In Spain, the sponsorship of sports teams by gambling operators has been prohibited since 2020, while gambling adverts are permitted on television between 1am and 5am only (Boletín Oficial del Estado, 2020). A staggered approach has been adopted in Belgium, where a blanket ban on marketing was enacted across public media (for example, television, radio, social media, and newspapers) in July 2023, stadia and football

leagues will be prohibited from displaying gambling sponsorship in January 2025, and professional sports teams will be banned from displaying gambling sponsors on kits from January 2028 (Moniteur Belge, 2023). A similar approach has also been followed in the Netherlands, where untargeted gambling marketing on television and towards those aged 24 and under has been prohibited since July 2023, with the sponsorship of sports clubs by gambling operators prohibited from July 2025 (Dutch Government, 2023).

In the UK, gambling adverts must comply with the Code of Advertising and Direct and Promotional Marketing (CAP), and the Code of Broadcast Advertising (Gambling Commission, 2022) – an industry, self-regulated system, similar to the Canadian Advertising Standards. What is different to Canada, however, is that the Code in the UK includes 21 individual codes specific on gambling marketing. For example, these codes require that marketing related to gambling must not be of strong appeal to – or include – anyone under the age of 18, misrepresent gambling as an activity that can bring social, financial or personal improvement, or condone irresponsible gambling behaviours. The Canadian Advertising Standards do not have any codes specific for gambling-related marketing.

Nonetheless, the presence of gambling-related marketing has received further scrutiny within recent years, with a particular focus on the prevalence of marketing within English football, resulting in increasing calls to also start limiting the volume of gambling marketing. A review of the Gambling Act 2005 – the current legislation that governs gambling and gambling-related marketing within Great Britain – arguably did little to address the prevalence of marketing, opting to leave the issue of marketing to self-regulation (Department for Culture, Media & Sport, 2023). Televised advertising is partly restricted by a 'whistle-to-whistle' ban voluntarily enforced by the Betting and Gaming Council – Britain's gambling industry body – that removes its members' commercial adverts from five minutes before the start of a sporting event, to five minutes

after the end of a sporting event before 9pm (Industry Group for Responsible Gambling, 2020). Meanwhile, clubs within the English Premier League will voluntarily remove gambling sponsorship from the front of teams' shirts only from the end of the 2025/2026 season (Premier League, 2023). On the other hand, recent research has shown that these self-regulatory measures do not effectively reduce the volume of advertising exposed to audiences during live football (Torrance et al., 2023; Rossi et al., 2023). Encouragingly, the review of the Gambling Act 2005 did recommend the development of centrally developed harm reduction messaging with the input of expertise from public health, thus moving the focus from 'responsible gambling' to messages that advise on the risks of gambling (Department for Culture, Media & Sport, 2023).

In summary, the regulation of gambling-related marketing in Ontario (both via the AGCO and Canadian Advertising Standards) is less developed than that in other jurisdictions where interventions have acknowledged and acted upon (to various degrees) the possible harms associated with gambling-related markets. In comparison, the NHL (2023) recently announced a multi-year partnership extension with BetMGM, which demonstrates the continued support for promoting gambling to sports fans through televised sports events. This partnership, the NHL (2023) notes, will also encouraging a "Have a Game Plan. Bet Responsibly" campaign. However, this is industry-friendly messaging that could further normalise gambling for underage and vulnerable audiences (Livingstone and Rintoul, 2020), while only 2.6% of marketing within our sample contained any harm reduction messaging. In summary, current legislation in Ontario is not yet developed to the extent that it can fully protect underage and vulnerable audiences from gambling-related marketing, and there is little indication that action taken by sporting bodies will reverse this trend.

93.9%

OF LOGOS OR REFERENCES DURING THE LIVE COVERAGE WERE FEATURED ON THE PLAYING SURFACE, OR ON ADVERTISING HOARDINGS.

8 | CONCLUSION

Our project has explored the prevalence of gambling-related marketing across a period of televised NHL and NBA games broadcasted in Ontario, in addition to the marketing disseminated by ten X accounts owned by operators offering gambling-related services in Canada. Our research has demonstrated the wide prevalence of gambling-related marketing and advertisements that – as previous research has highlighted – may influence gambling behaviours (Bouguettaya et al., 2020; McGrane et al., 2023). The significant volume of adverts, and the way they portray gambling across both television and social media, also risk the normalisation of gambling – a potentially addictive product – to underage and vulnerable audiences. Our findings highlight the inefficacy of the marketing and advertising standards currently maintained by AGCO, in addition to the Canadian Code of Advertising Standards. In conclusion, we hope that our research makes a meaningful contribution to the discussion on how populations can be best protected from the harms that may emerge from the exposure to gambling-related marketing.

21.6%

OF THE ENTIRE DURATION OF THE LIVE COVERAGE CONTAINED A GAMBLING LOGO OR REFERENCE TO GAMBLING.

3,537
GAMBLING LOGOS OR REFERENCES DURING THE SEVEN GAMES

9 | ABOUT THE AUTHORS

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Jamie is a Research Associate at the University of Bristol, and is affiliated with the Bristol Hub for Gambling Harms Research. Jamie's research interests lie in the nexus of gambling, consumption, and sports, exploring how economic, societal, and cultural factors influence the convergence of sports and gambling. He has also previously explored the digital transformation of Britain's land-based betting industry from a critical perspective.

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Saeid is a PhD student at the University of Bristol and focuses his research on the impact of regulations, sports, culture, and other factors on reducing the harm caused by gambling advertising. His previous work involved studying consumer emotions, brands, culture, consumer psychology, and the consumption patterns of minors.

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Raffaello is Lecturer in Marketing at the University of Bristol Business School. He has worked extensively on the effects of gambling advertising to young people, resulting in national and international media coverage, discussion of the research in UK parliament, and has contributed to a several changes in the regulation of gambling advertising.

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Edoardo is a postgraduate researcher affiliated with the University of Bristol Business School. His research focuses on conducting a psychophysiological study regarding the impact of (e)sports gambling advertising on social media platforms among the youth demographic. His specific area of investigation involves analysing content and influencer marketing strategies. Edoardo is closely associated with the Bristol Hub for Gambling Harms Research as part of his academic pursuits.

Edoardo has not received any external funding.

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