

# research snapshot

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## A comparison of gambling advertisement expenditures during the COVID-19 lockdowns and before the pandemic in the UK

### What this research is about

The COVID-19 pandemic changed daily life from 2020 to 2021. In the United Kingdom (UK), 'lockdowns' were held to decrease the transmission of the virus. These lockdowns closed all non-essential businesses, including most land-based gambling premises (e.g., betting shops, casinos, and bingo halls).

Previous research found an overall decrease in gambling during the first lockdown. But internet gambling increased during part of the first lockdown. Previous research has also found differences between certain groups. For example, people with gambling problems were more likely to increase their gambling during the pandemic.

Advertising can influence gambling behaviours. In this study, the researchers examined expenditure (i.e., money spent) on paid-for gambling advertising during three COVID-19 lockdowns. They compared these expenditures to the same time points in 2019.

### What the researchers did

The researchers bought data from Nielsen's Advertising Intelligence Services. Nielsen provided 135 weeks of data. The data included information on gambling advertisement expenditures each week.

The data included the amount spent on paid-for ads through cinema, television, direct mail (i.e., mail sent to named addressee), door drops (i.e., bulk mail sent without addressee), internet, outdoor, press (e.g., newspapers), radio, and digital video. Nielsen provided a breakdown of the total expenditure by seven subsectors: bookmakers, gaming, lotteries, online bingo, online casino and poker, pools, and mobile content.

### What you need to know

The United Kingdom held three national lockdowns during the COVID-19 pandemic. The researchers examined expenditure on gambling advertising during these lockdowns. They also compared these expenditures to the same time points in 2019. The researchers bought 135 weeks of data from Nielsen's Advertising Intelligence Services. Estimated spend on gambling ads during the first lockdown was 38.5% lower than 2019. Decreases in expenditure were seen across all seven subsectors (bookmakers, lotteries, online bingo, online casino and poker, gaming, pools, mobile content). But during the second lockdown, estimated expenditure was 49.3% higher than in 2019, with five subsectors having an increase compared to the same period in 2019. In the third lockdown, estimated expenditure was 5.9% higher than in 2019. This increase was reflected in four subsectors.

The researchers accounted for inflation, by adjusting expenditure estimates to 2021 pricing using a leading inflation measure in the UK.

The researchers identified three time periods within their dataset. These time periods aligned with the UK lockdowns. The researchers defined lockdowns as the dates when stay-at-home rules were mandated. The researchers identified these time periods using government reporting of restrictions (mostly from England).

In the period defined as the first lockdown, most sport activities were stopped in the UK. During the period defined as the second lockdown, most live sports had

resumed, but with little or no spectators allowed. Live sports continued to be allowed throughout the third lockdown, again with little or no spectators.

### What the researchers found

Across the 135 weeks, gambling operators spent about £972.5 million [m] on all subsectors and media. A total of 233 operators spent some money on advertising in at least one week.

In 2019, operators spent an estimated £356.2m with 131 operators having spent money on advertising. Expenditure on gambling advertising during the first lockdown decreased by 38.5% compared to 2019. During the lockdown, operators spent an estimated £43.5 m on gambling ads vs. £70.7 m spent during the same period in 2019. Bookmakers saw the largest decrease in spending on advertising by 81.7% compared to 2019. The bingo subsector saw the smallest decrease of 2.8%. During the first lockdown, the number of gambling operators who spent money on advertising was 37% lower than during the same time period in 2019. But the number of lottery operators who spent money on advertisements increased by 33.8%.

Total advertising expenditure was 49.3% higher during the second lockdown than it was during the same time period in 2019 (£51.7 m vs. £34.6 m). There were increases in five of the seven subsectors. In particular, expenditures by bookmakers rose by 103.8%, and online casino and poker increased by 93%. But there were decreases in spending for pools (-25.5%) and mobile content (-31.6%). The number of operators who spent money on advertising increased by 46.2% compared with the same time period in 2019.

Total advertising expenditure in the third lockdown was 5.9% higher than it was in 2019. The estimated amount spent on advertising totaled £91.2 m vs. £86.1 m during the same period in 2019. Increases in expenditure during the third lockdown were seen in four subsectors. Mobile content advertising expenditure increased the most by almost 50%. There were decreases in advertising expenditure for pools (-92.4%), online bingo (-12.9%), and bookmakers (-3.2%). There was little change in the number of

operators spent money on advertising during the third lockdown vs. the same time period in 2019.

### How you can use this research

This research provided updated estimates about advertising expenditure in the UK, both before and during the pandemic. Policy makers can use this information in discussions about the nature and control of gambling marketing in the UK.

### About the researchers

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### Citation

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