



MediaRadar

# Canadian Online Gambling & Sports Betting Trends

## 2025 – First Half Report

# EXECUTIVE SUMMARY

## Gambling and Sports Betting Advertising Trends in Canada

### Ad Spend and TV Occurrences for Online Gambling: Casinos; Sports Betting & Odds Information Class

- Total Media ad spend for Online Gambling has risen in the first half of 2025 but remains lower than peak years.
- When comparing the first halves, TV spend is slightly up in Online Gambling compared to 2024 but overall, it is showing that activity is levelling off.
- Compared to all other activity, Online Gambling only represents 5% of Total TV Ad Spend and 2% of all TV Ad Occurrences in the first half of 2025.
- Online Gambling represents 2% share of Total Media Ad Spend in 2025. Automotive, Financial & Insurance, and Fast Food all have significantly higher spend than Online Gambling for both Total Media. Pharma also has higher Total Media ad spend than Online Gambling
- Only 5% of NHL Hockey Game occurrences were for Online Gambling ads so far in 2025, which is the same as 2024 and a decrease from 6% in 2023.

# METHODOLOGY AND COVERAGE

**Markets included in analysis: Total Canada**

**Time Frame: Jan 2020 – June 2025**

**Media Types: Television (Network and Selective), Print (Newspaper and Magazine), Out of Home, Radio, Digital (Desktop Display, Desktop Video, Mobile Web Browser)**

**Data Used in Analysis: MediaRadar Ad Intel Canada**

- MediaRadar monitors advertising media spending activity in Canada, providing the industry standard measurement for ad intel across television, print, radio, out-of-home and digital media.
- This report includes analysis on Advertising Expenditures and TV Ad Occurrences across Total Canada.
  - Ad Intel Dollars are inclusive of standard ad formats, except for the following:
    - Print: Ads smaller than 100 agate lines; free-standing inserts; Corrections, notices & tenders; Community/Weekly newspapers; Classifieds; Publication self-promotion
    - Television: Station self-promotion; Paid programming, infomercials, Barter/contra; Ad lengths over 120 seconds
    - Radio: Direct buys negotiated outside of participating local market stations; Station self-promotion
    - Out of Home: Ad purchased through non-partnered media owners
    - Digital: Paid Social, Paid Search, Mobile App, Website Takeovers and Skins, Streaming Music Platforms
  - TV Ad Occurrences include the number of ad placements captured within Vivvix's GRP station coverage
- The Advertising Expenditures reported utilize two main methodologies for estimation: Declarative industry reporting in partnership with industry partners (TV, Radio, Out of Home); and Proprietary in-house estimation within our collection (Print, Digital)
- Market allocation for digital ad spend is determined by the language of the website the ads are captured on, either English or French. If the ad is captured from an English website, the spend is distributed proportionally across the English markets based on population. If the ad is captured from a French website, the spend is distributed proportionally across the French markets based on population.
- The analysis included in this report focuses on the Online Gambling: Casinos; Sports Betting & Odds Information class and makes comparisons to select product categories: Financial & Insurance, Automotive, Fast-Food Restaurants, Snack Food and Soft Drinks, Pharma, Alcohol, Lotteries.

**TV Programming Info – NHL Hockey**

- Includes NHL Hockey games, pre-season, regular season, playoffs, encore, All Star Games, 4 Nations
- Does not include pre-game, post-game, classics, drafts, highlight shows or condensed games

# CATEGORY GROUPINGS

## Online Gambling

- Includes Online Gambling: Casino, Sports Betting Odds & Info class: inclusive of advertising placed by web or app-based casinos and betting services. Also, for any online gambling aspects of a casino or betting service that has a physical location. Advertising is focused on quality or variety of available casino games, current or future sporting event bets available, gambling odds and advice, convenience and utility of their mobile app or website platform, promotions for using their service, or new sign-up/account offers.

## Financial & Insurance

- Includes Financial Services & Insurance Services category

## Automotive

- Includes Automotive: Cars, Vans, Trucks; Dealer category and Local Automotive Dealer Advertising category
- Does not include used vehicles or aftermarket activity

## Fast Food Restaurants

- Includes Restaurants – Fast Food class
- Does not include non-fast food restaurants ie. Boston Pizza, The Keg

## Snack Food + Soft Drinks

- Includes Cakes, Chocolate Bars, Boxed Chocolates, Confectionary Manufacturers: Image, Ice Cream, Frozen Yogurt and Treats, Snack Foods, Puddings, Portable Snacks, Candy without Chocolate, Cookies & Sweet Biscuits, Soft Drink Manufacturers: Image, Regular Soft Drinks and Diet Soft Drinks classes
- Does not include Sports Drinks or Extreme Energy Drinks

## Pharma

- Includes Drug Products category which includes prescriptions drugs as well as over-the-counter drugs

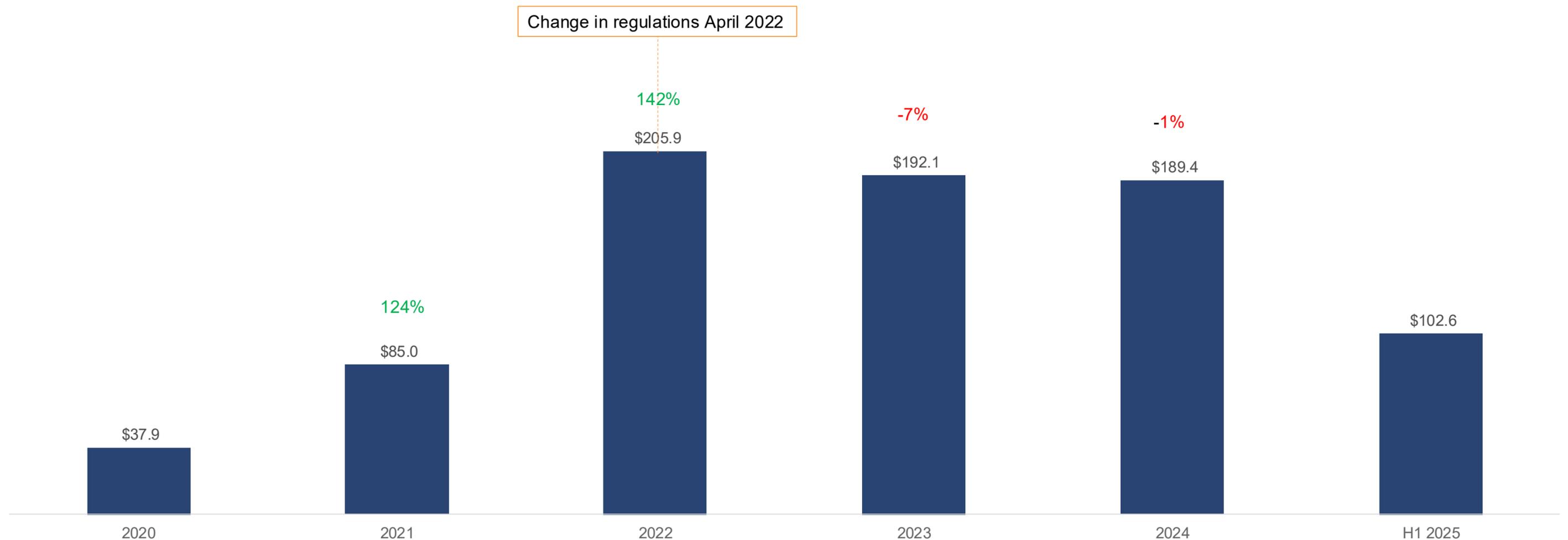
## Alcohol

- Includes Alcohol & Related Beverages category

# ADVERTISING SPEND FOR ONLINE GAMBLING PEAKED IN 2022

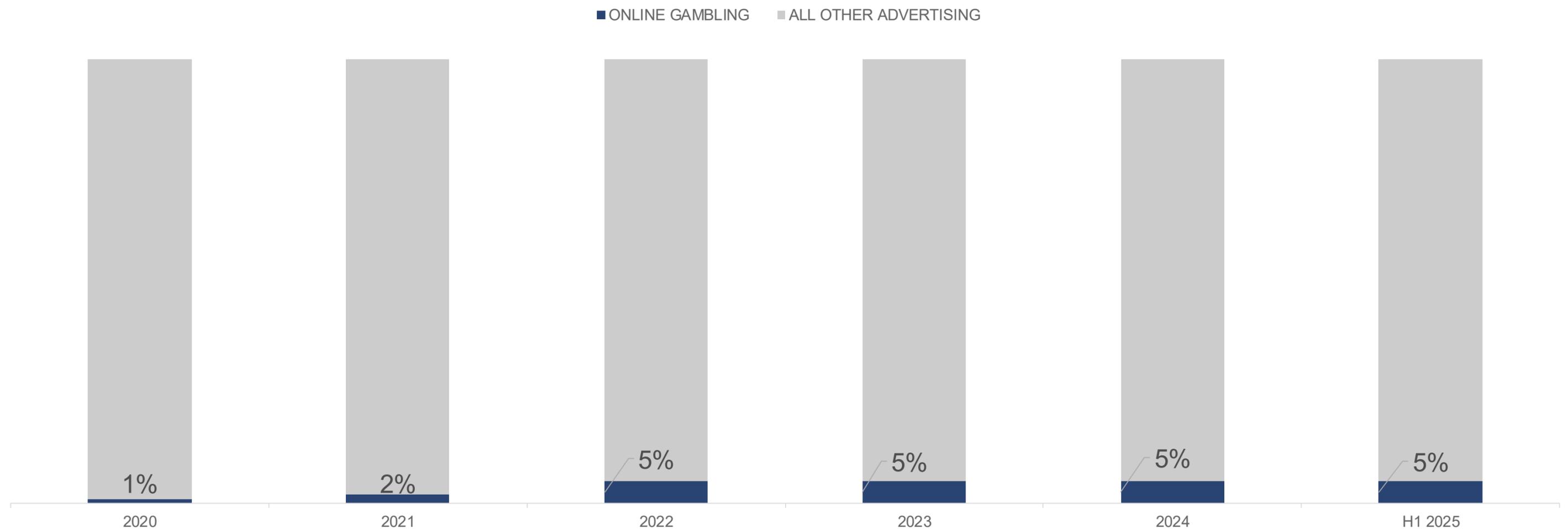
Following a change in regulations in April 2022, the Online Gambling category saw a significant increase in Ad Spend (142%), followed by 2 consecutive declines (7% and 1%).

Annual Total Online Gambling Ad Spend, in Millions  
2020 - H1 2025, Total Media, Total Canada



# ONLINE GAMBLING HAS ONLY CONTRIBUTED 5% OF TOTAL TELEVISION AD SPENDING OVER THE PAST 4 YEARS

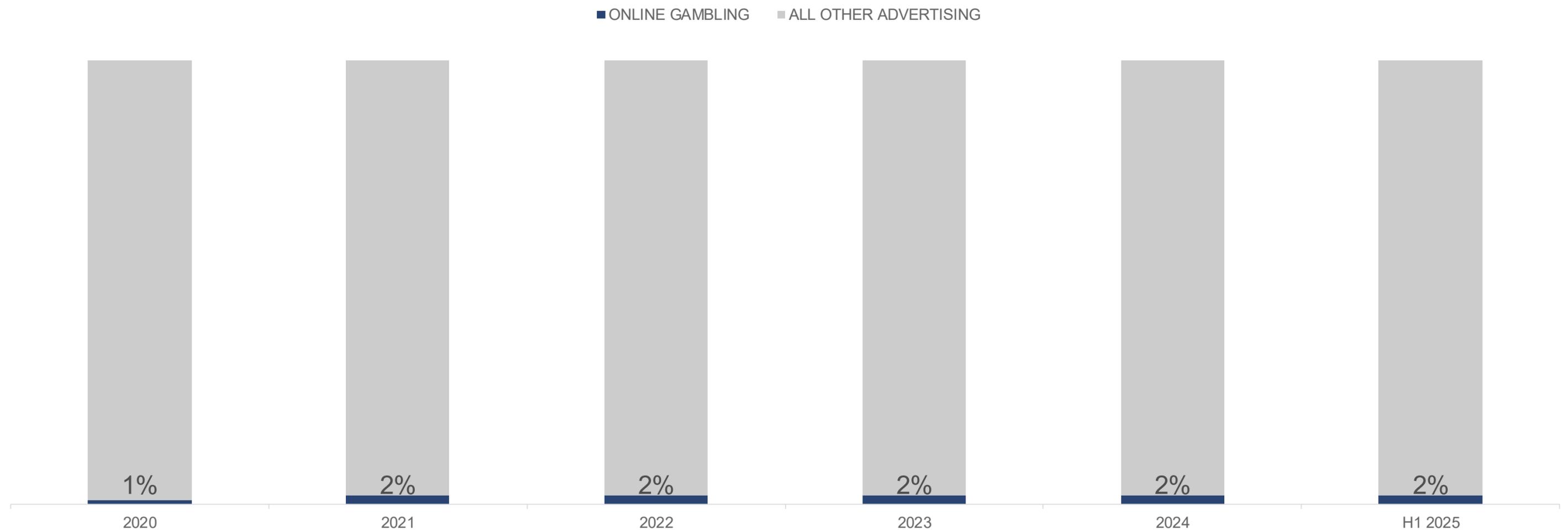
Annual Online Gambling, Television Ad Spend, by Year  
2020- H1 2025, Television, Total Canada



# ONLINE GAMBLING ONLY MADE UP 2% OF ALL TV AD OCCURRENCES OVER THE PAST 5 YEARS

Relative to all other advertising, Online Gambling has not had a significant increase in overall proportion of TV ad activity.

Annual Total Online Gambling TV Occurrences, by Year  
2020-2025, Total Canada



# IN 2025, ONLINE GAMBLING REMAINS AT 2% OF TOTAL AD SPEND IN THE FIRST HALF OF 2025

Automotive, Financial & Insurance, Fast Food Restaurants and Pharma are all key categories that had more total spend than Online Gambling.



# WHEN COMPARING FIRST HALVES OF 2024 AND 2025, ONLINE GAMBLING AD SPEND DECREASED FROM 3% TO 2% OF TOTAL AD SPEND

Automotive, Financial & Insurance, Fast Food Restaurants and Pharma are all key categories that had more total spend than Online Gambling.

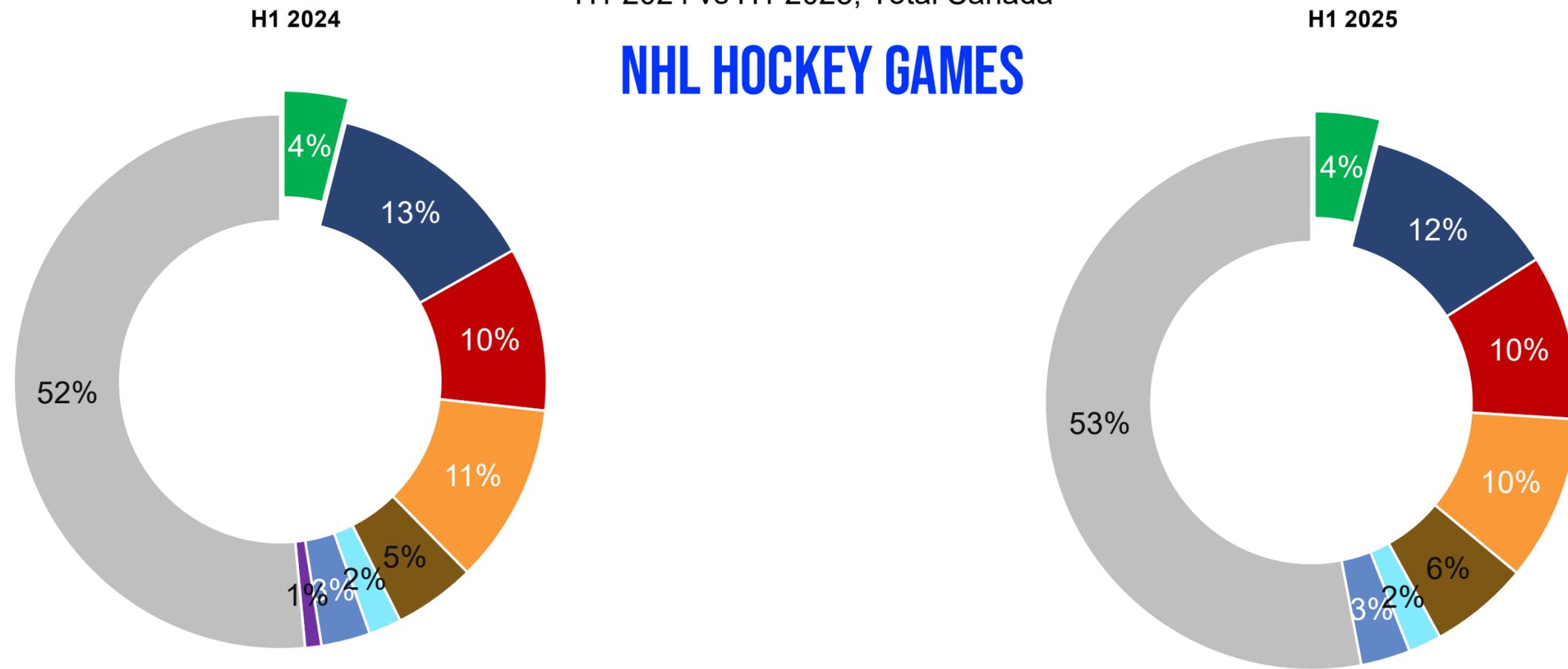


# ONLINE GAMBLING TV OCCURRENCES DURING NHL HOCKEY REMAINS AT 4% SO FAR IN 2025

Lotteries category represented <1% in 2025

Share of Ad Occurrences, by Program Type, Key Categories  
H1 2024 vs H1 2025, Total Canada

## NHL HOCKEY GAMES



■ ONLINE GAMBLING 
 ■ AUTOMOTIVE 
 ■ FAST FOOD RESTAURANTS 
 ■ FINANCIAL & INSURANCE SERVICES 
 ■ PHARMA 
 ■ SNACK FOOD + SOFT DRINKS 
 ■ ALCOHOL & RELATED BEVERAGES 
 ■ LOTTERIES 
 ■ OTHER