

2025

Online Casino Advertising Trends



::: Methodology



TIMEFRAME

Online advertising spend and impressions in the U.S. from January 1, 2025 – May 31, 2025.



DATA SOURCE & SCOPE

Sensor Tower data for the “online real money casino” category which includes sweepstakes casino sites.

Pathmatics by Sensor Tower is a digital advertising intelligence platform, providing data analytics and insights into digital ad campaigns across various channels, including display, video, social, and mobile.



Consumers Widely Exposed to Offshore or Sweeps Casino Ads

01

Half of all the online ads for online casinos that consumers are exposed to are for offshore or sweepstakes casinos.

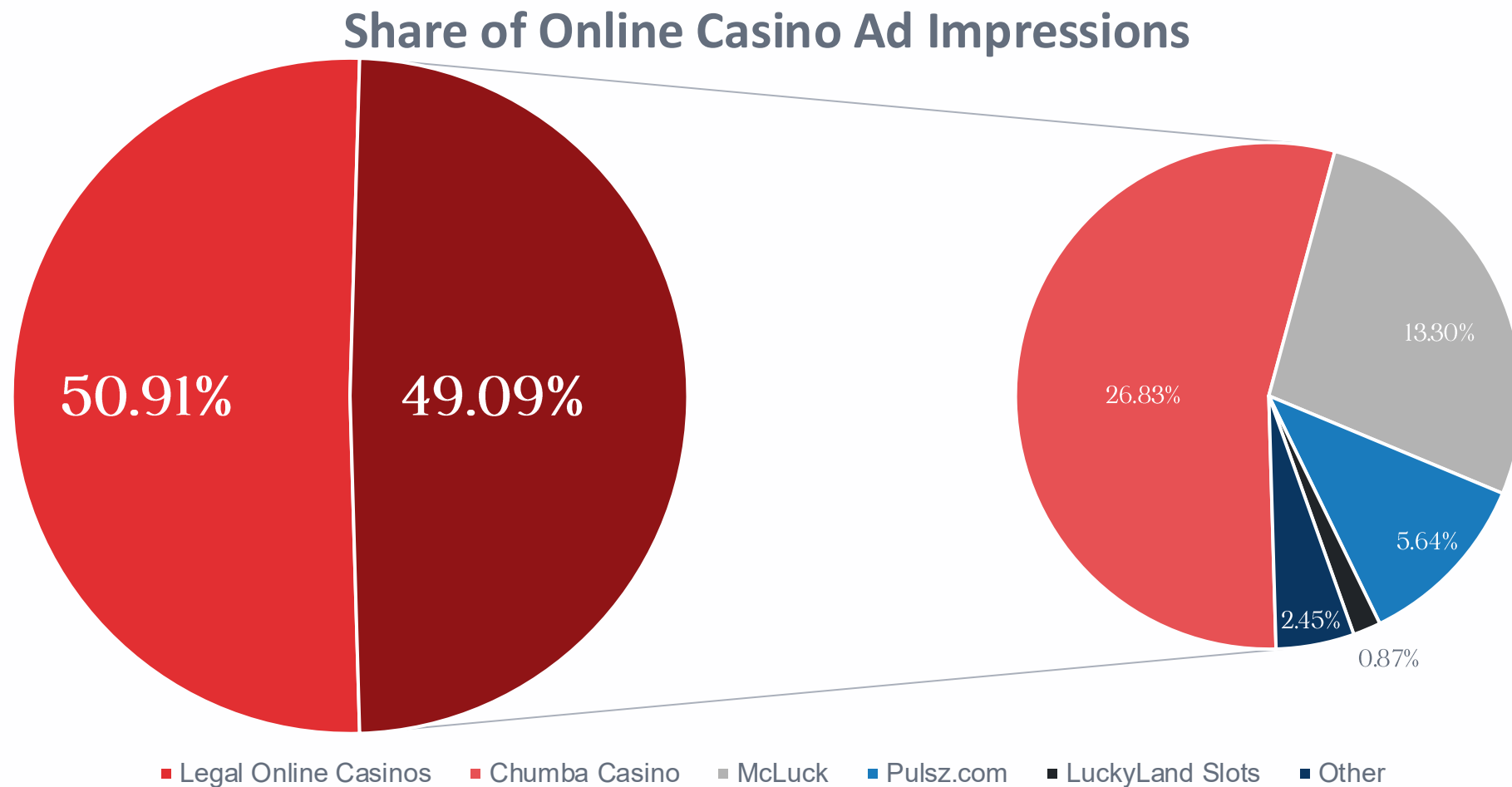
02

Offshore and sweepstakes sites heavily concentrate their ads on specific channels like YouTube or Reddit, while legal operators are more balanced across platforms.

03

Offshore and sweepstakes casinos target consumers in states without sweeps enforcement or prohibition actions.

::: Half of all Online Casino Ads are for Offshore or Sweeps Sites



Source: Sensor Tower

JANUARY-MAY 2025

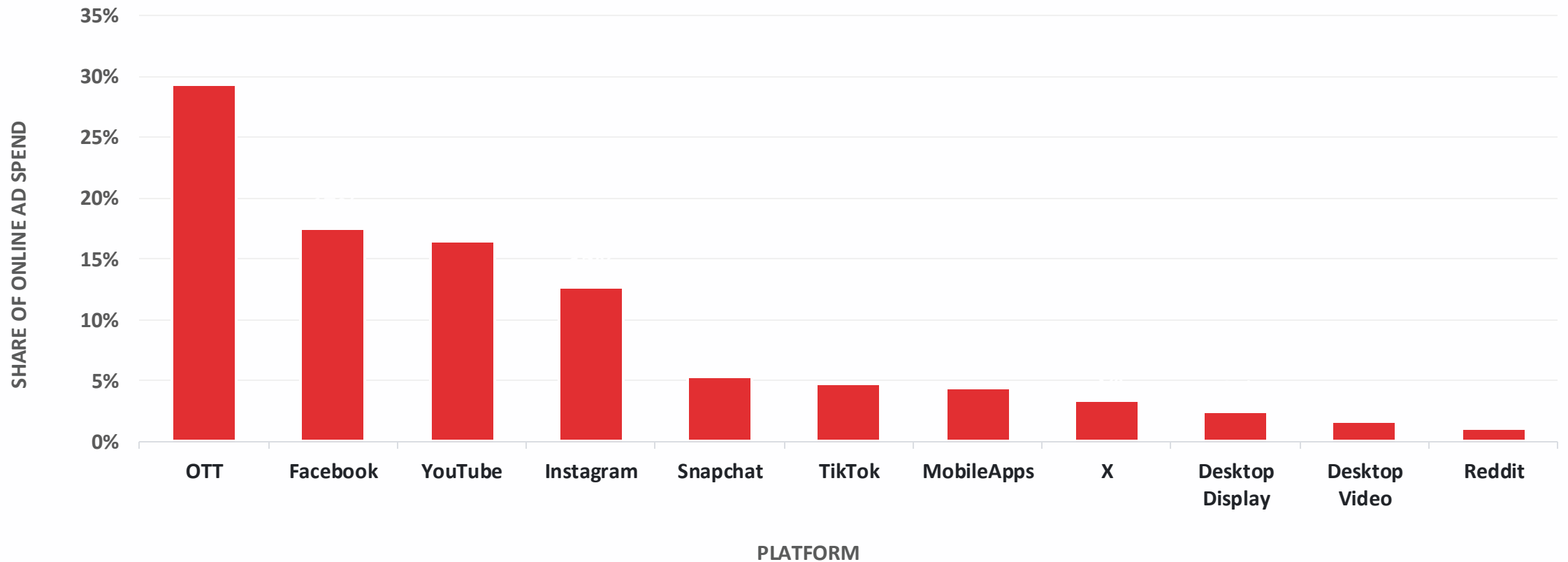
Online Real Money Casino: Top Advertising Brands

BRAND	CATEGORY SPEND SHARE	IMPRESSIONS
FanDuel Casino	35.12%	2,445,479,900
Chumba Casino	15.97%	1,987,606,500
McLuck	19.96%	985,089,400
DraftKings Casino	8.73%	628,430,400
BetMGM Casino	9.15%	624,531,100
Pulsz.com (Yellow Social Interactive)	7.58%	417,775,000
LuckyLand Slots	0.79%	64,677,900
FGB Enterprises OpCo., LLC (Fanatics)	0.39%	41,092,400
Stake.us (Medium Rare N.V.)	0.32%	36,215,300
Zula Casino (SCPS LLC)	0.39%	32,039,300

Source: Sensor Tower

JANUARY – MAY 2025

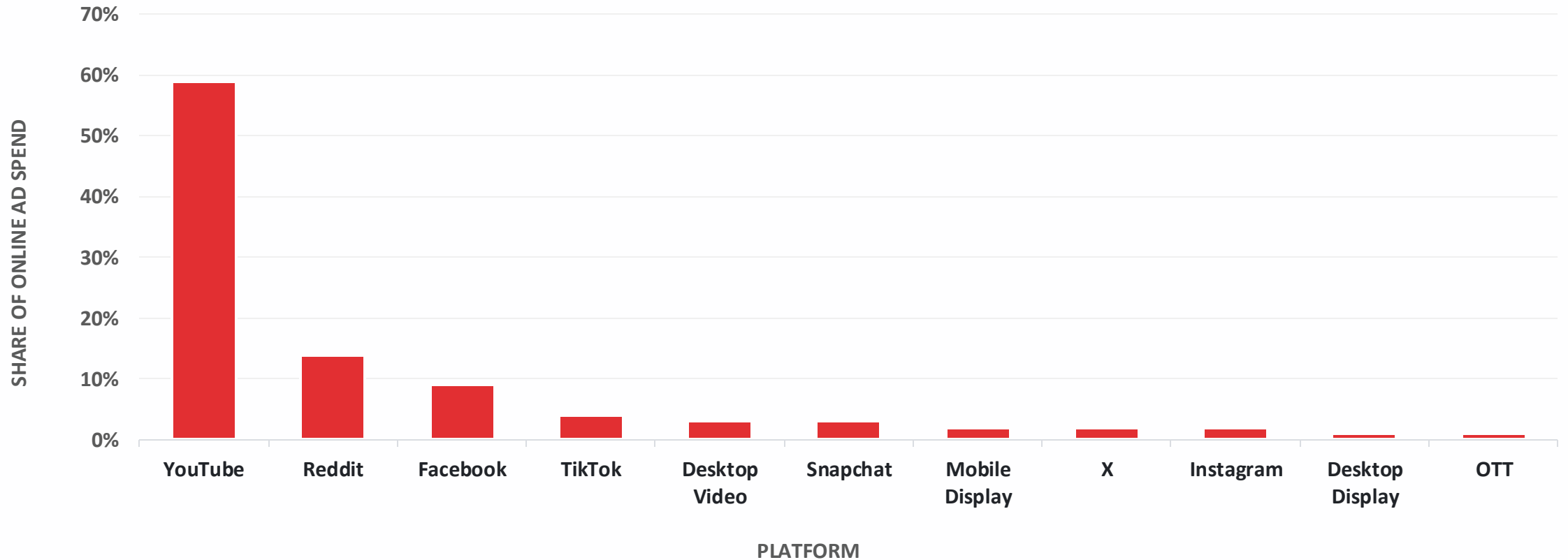
Legal Online Casino Ad Spend by Platform



Legal Online Casino Basket: FanDuel Casino, DraftKings Casino, BetMGM, Fanatics, Bally's, Caesars
Source: Sensor Tower

JANUARY – MAY 2025

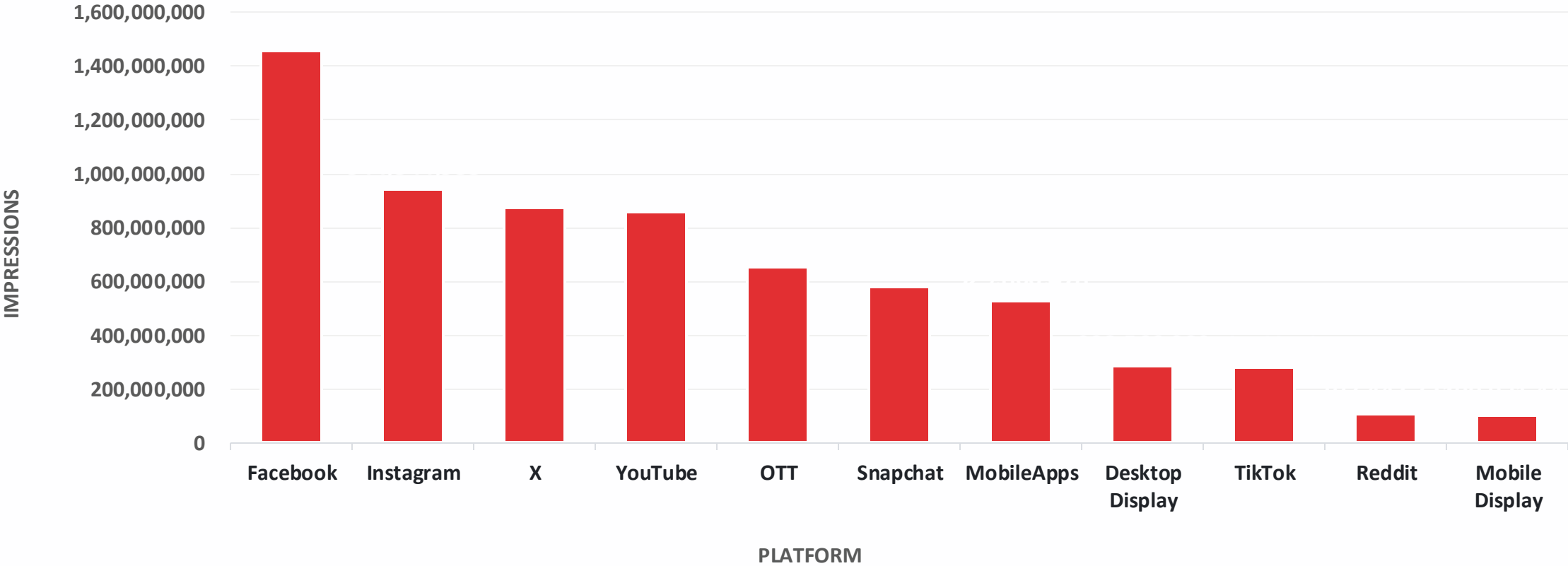
Sweeps Casino Ad Spend by Platform



Sweeps Casino Basket: Chumba Casino, McLuck, Pulsz.com, LuckyLand Slots, Zula Casino, Stake.us, WOW Vegas
Source: Sensor Tower

JANUARY – MAY 2025

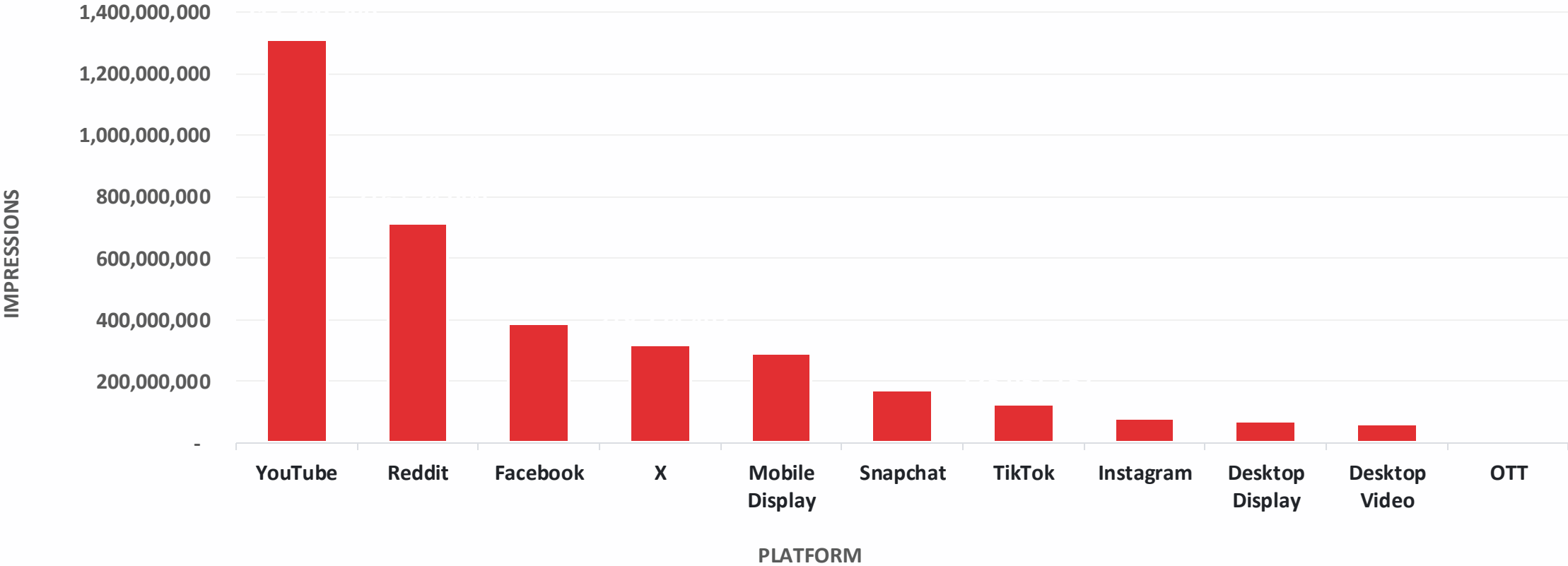
Legal Online Casino Ad Impressions by Platform



Legal Online Casino Basket: FanDuel Casino, DraftKings Casino, BetMGM, Fanatics, Bally's, Caesars
Source: Sensor Tower

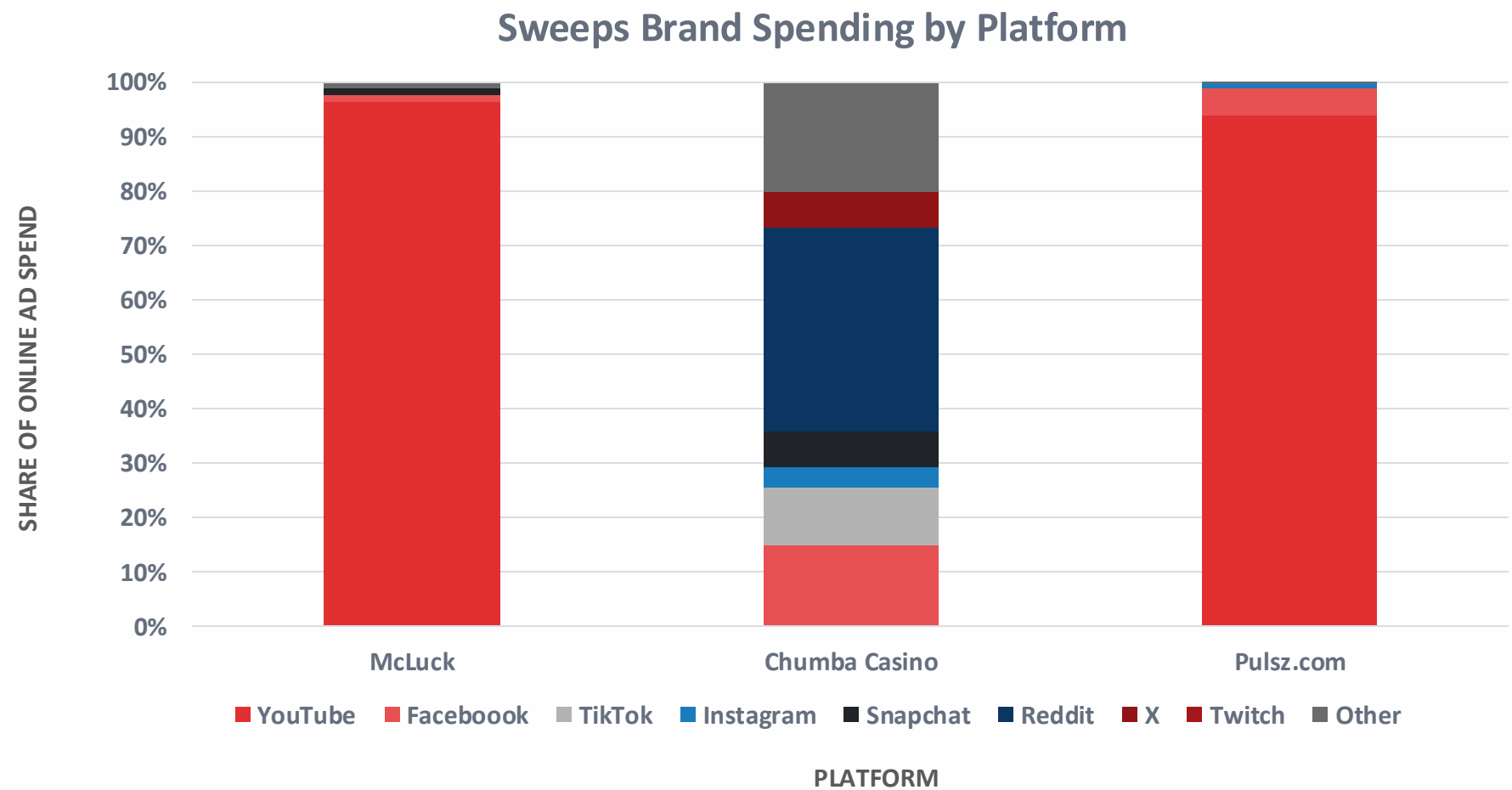
JANUARY – MAY 2025

Sweeps Casino Ad Impressions by Platform



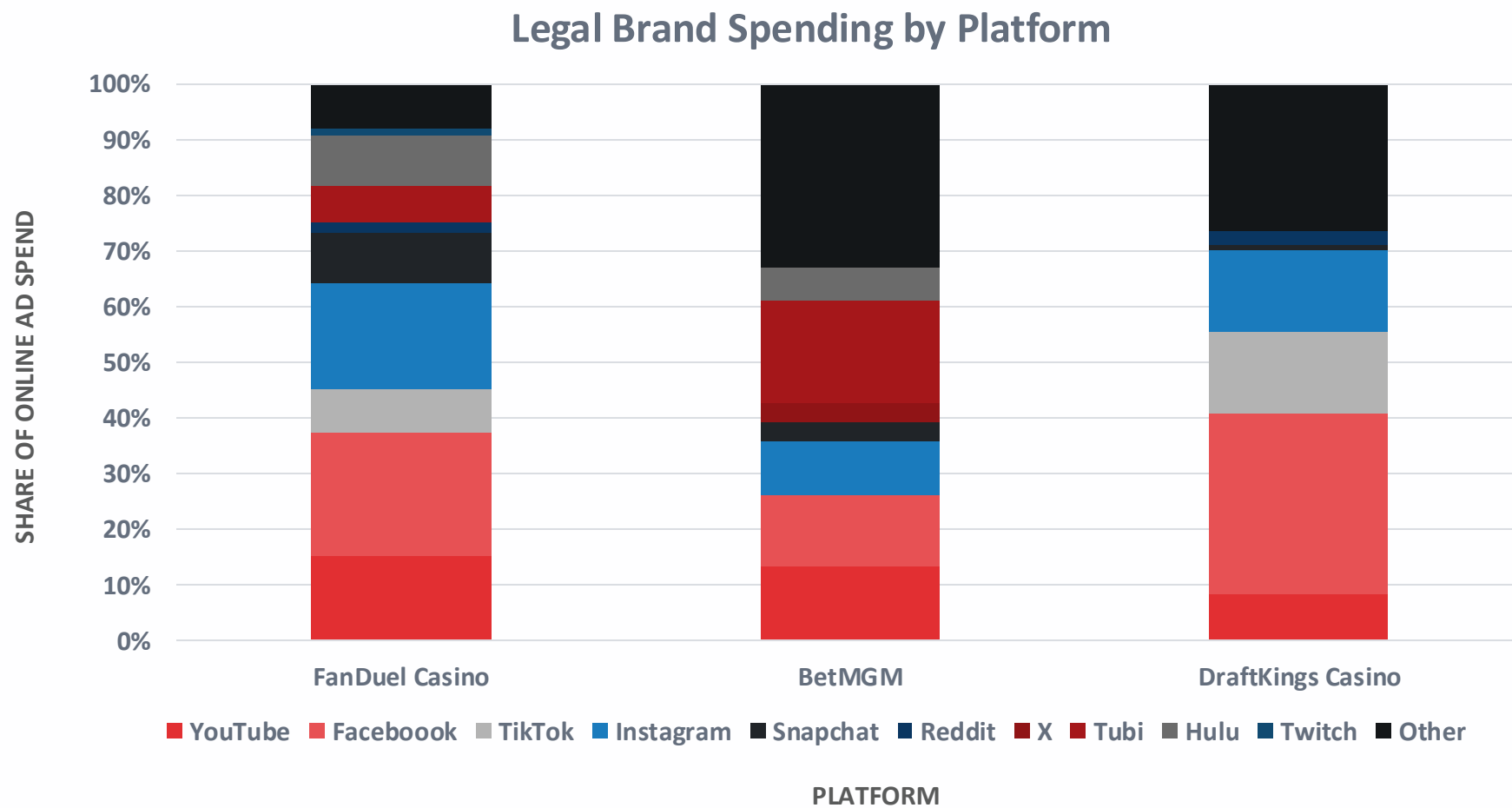
Sweeps Casino Basket: Chumba Casino, McLuck, Pulsz.com, LuckyLand Slots, Zula Casino, Stake.us, WOW Vegas
Source: Sensor Tower

::: Pulsz and McLuck Overwhelmingly Advertise on YouTube



Source: Sensor Tower

::: Legal Online Casinos are More Balanced

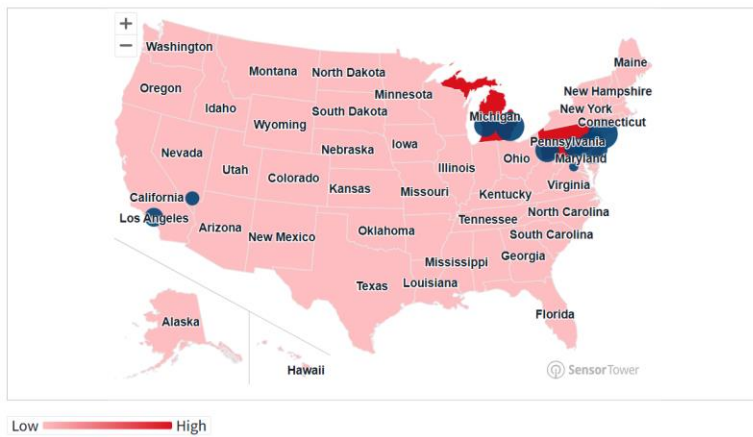


Source: Sensor Tower

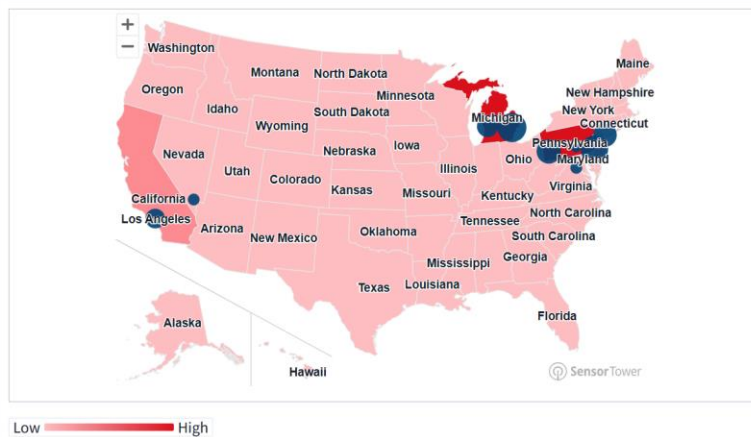


::: Legal iGaming Operators Overwhelmingly Advertise in Legal iGaming States

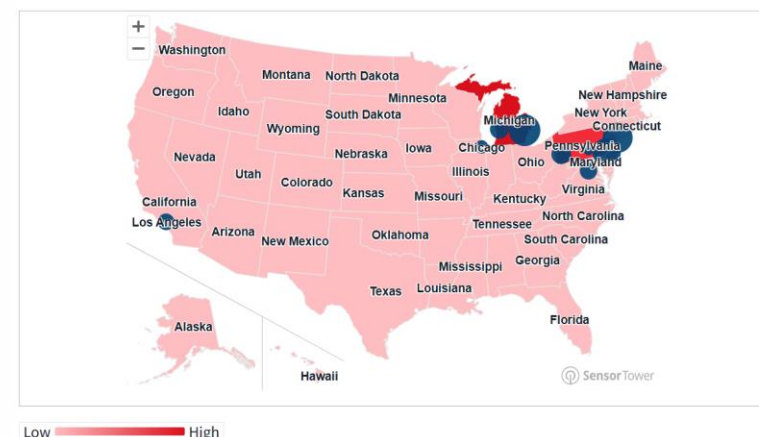
FanDuel



DraftKings



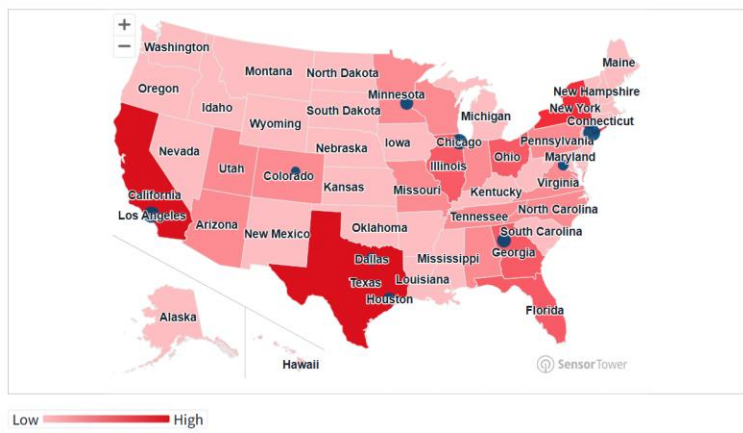
BetMGM



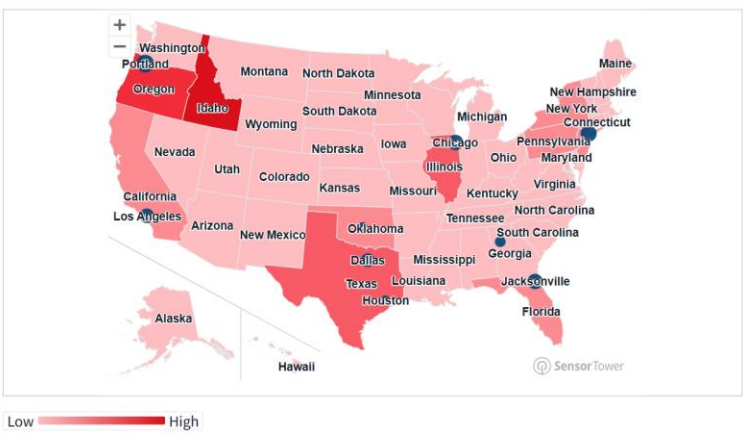
Geography Breakdown; Jan. 1 – May 31, 2025, Online Real Money Casino Ads

::: Offshore/Sweeps Operators Focus Advertising in States Without Sweeps Enforcement and Prohibition Actions

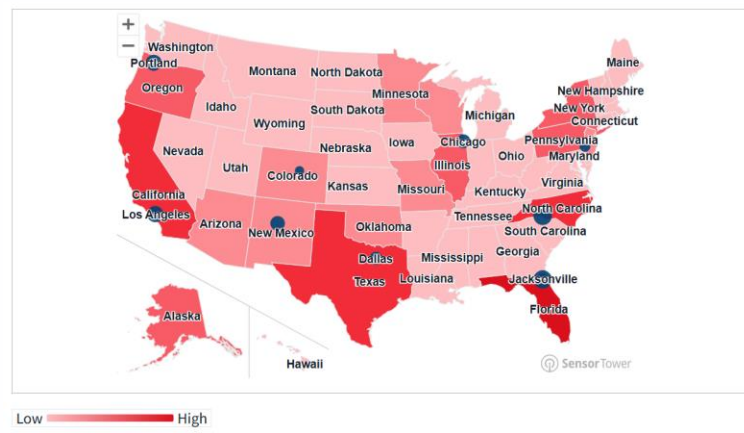
Chumba



Pulsz.com



McLuck



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