



the campaign for *fairer gambling*

GREAT BRITAIN

**GB NATIONAL 2024 FY / 2025 First Half
FULL REPORT AND ADDITIONAL DATA**

Online Gambling Marketplace

MONITORING, DATA & ANALYSIS BY



The Campaign for Fairer Gambling: Introduction

INTRODUCTION

I am a philanthropic campaigner for gambling reform through the US-based Campaign for Fairer Gambling (CFG), with support from associates in the UK.

A few years ago, the trade lobbying group the Betting and Gaming Council (BGC) commissioned Yield Sec to report on the British illegal market. The BGC chose not to publish the report.

The BGC then commissioned Frontier Economics to conduct an analysis. That study used survey data, which is far inferior to the military-grade software approach of Yield Sec. A subsequent report by the trade-aligned Deal Me Out used a far less reliable survey method. CFG commissioned analysis by Landman Economics of these two reports [here](#) and [here](#).

The BGC oppose the Gambling Commission (GC) Gambling Survey for Great Britain (GSGB), ostensibly due to the survey method. The reality is they do not like the results, which show 2.5% of the adult population is in the highest harm group. This all suggests the BGC likes surveys that align with their agenda while disliking those that do not.

The 2005 Gambling Act failed to require GB licensing of remote gambling. It allowed operators to stay offshore, under lax regulation, with no gambling tax liability and avoiding UK corporate taxes. As a result, there was effectively no clear differentiation between legal and illegal sites and practices.

It was only after the Gambling (Licensing and Advertising) Act 2014 that GC licensing was required and a point of consumption tax at a low rate of 15% was applied. However, the legacy issues of lax oversight and questionable practices still persist.

CFG submitted [evidence to the 2025 UK Treasury](#) remote gambling tax consultation, opposing the merging, or "harmonization," of existing rates of remote gambling duty and recommending significant tax increases. The BGC and media allies have talked up fears of the black-market to oppose tax increases.

Against the backdrop of these current tax debates, this Yield Sec report could not be more timely.

Compiled by Derek Webb, founder and funder of the Campaign for Fairer Gambling.

Protecting Online Borders. Defending the Economy. Minimizing the Harm.

Yield Sec: Great Britain – Executive Summary, 1 of 2

The UK Gambling Act 2005 had clear aims:

- Exclusion of children (under 18s)
- Protection of the vulnerable
- Organization and regulation of the business of betting and gaming

Over two decades of online gambling regulation, across a highly competitive marketplace, Great Britain is the global leader for legal and regulated online gambling.

The vast majority of global marketplaces look to Great Britain, and the practices of its legalization and regulation, as setting the rulebook on how to “channelize” the marketplace effectively: legal gambling should thrive, whilst illegal is left to die. But Great Britain has specific historic, cultural and competitive reasons for its long-thought minimal share of illegal gambling penetration. Global marketplaces copying the Great British model have failed to replicate anything like Great Britain’s legal versus illegal split.

What about Great Britain itself? For many years, there was an assumption that there was no “black-market” in Great Britain, because who would use it with so many legal gambling options available? Have laws and rules prevented crime from entering and succeeding with their illegal, unlicensed and unregulated online gambling options?

Not quite.

Whilst the vast majority of Great Britain’s online gambling activity remains legal, crime has discovered and established a lucrative home in Great Britain. The fact that it has made that home in the heart of the communities that the Gambling Act itself seeks to protect – “children and other vulnerable persons” – is a failure across regulation and oversight.

Yield Sec has repeatedly identified, reported upon and called for action from those stakeholders who can and are mandated to make change happen. The closing of sponsored link sales on Google for “Not on Gamstop” might seem like a “success” when you press release it and talk about it on podcasts and in parliamentary reviews. But it isn’t a success, and it’s not preventing the abuse and suffering of under 18s and self-excluded players. These are both audiences that the law defines as “vulnerable”, yet they can openly find and use illegal and unlicensed gambling services in Great Britain through a simple “Not on Gamstop” search on Google.

Yield Sec: Great Britain – Executive Summary, 2 of 2

If stakeholders in Great Britain's online gambling marketplace understood crime and its impact upon the total online marketplace, they'd know that no illegals ever pay for sponsored link sales. Why? Because crime understands this: you pay the least to make the most from audiences with no other choice. That means your audience recruitment for illegal gambling is coming from other areas in the ecosystem – and definitely not from sponsored link sales.

As in other global marketplaces, crime finds a way – in Great Britain, the “Not on Gamstop” phenomenon is that way.

All online marketplaces must identify, reduce, and remove crime – constantly. That only happens through process: Yield Sec defines this as **MPEO – Monitor. Police. Enforce. Optimize.**

Crime across Great British online gambling established itself and thrived by targeting the niche audiences of under 18s and self-excluded players in the absence of monitoring, policing, enforcement and optimization. It is up to legal stakeholders, working together, to reduce and remove the current criminal reality across these niche audiences.

Yield Sec historic and current data has consistently shown that there is no growing “black-market menace” that affects the entire audience in Great Britain. The illegal market share in Great Britain is driven overwhelmingly from two audiences: under 18s and self-excluded players. It is not driven by the mainstream audience migrating to illegals – it is too expensive for illegals to do any effective marketing towards mainstream GB audiences, and there is no clear benefit to any mainstream GB customer from using an illegal gambling operator. Under 18s and self-excluded players rely on illegal operators for clear benefits: they will fail KYC and self-exclusion restrictions which exist with legal operators only. Furthermore, it is cheap and effective for illegals to target those audiences, as no legal operators compete with them for marketing to these two audiences.

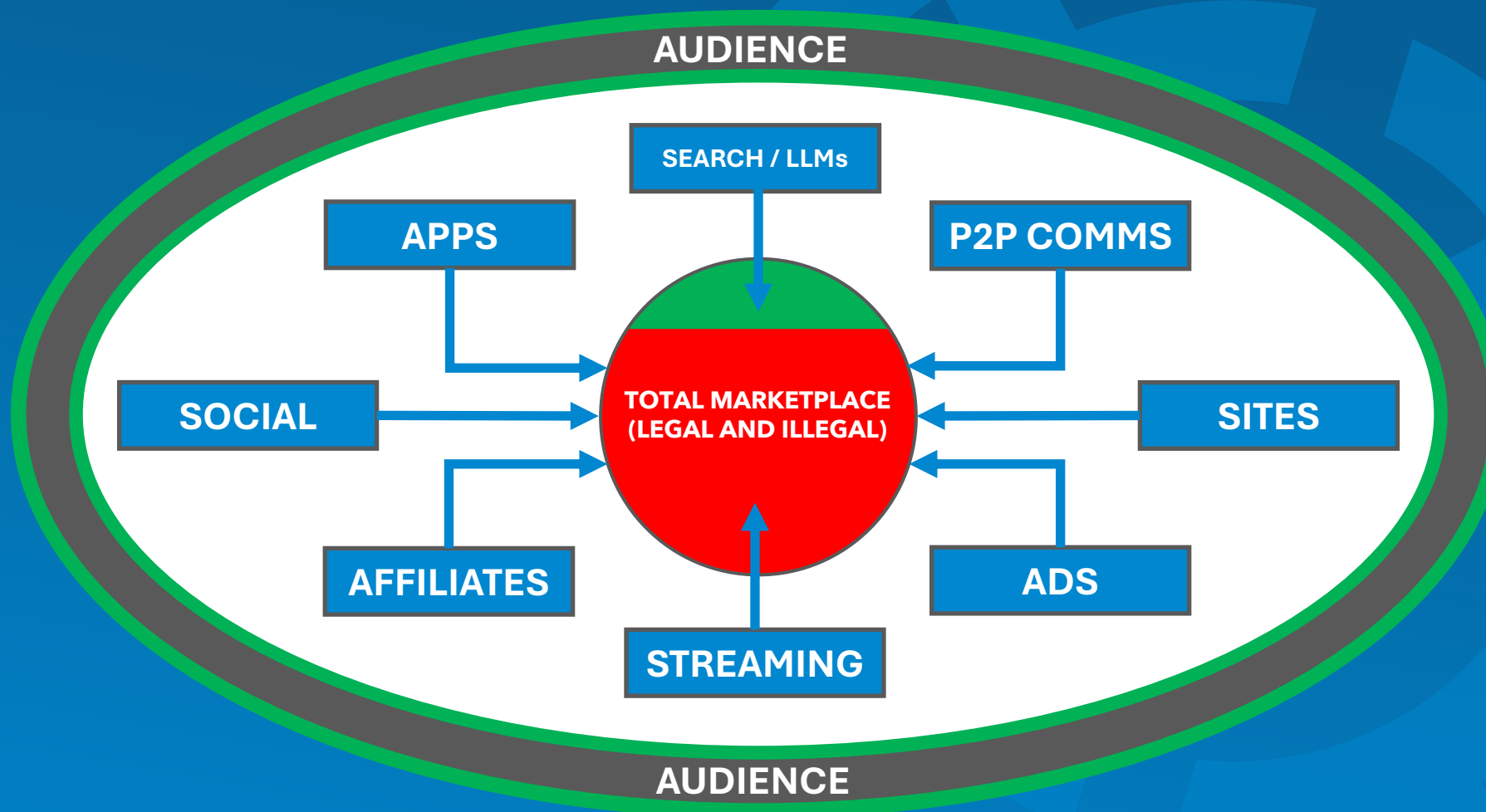
Illegals would not target mainstream audiences in Great Britain, as illegals understand the “pay the least to make the most” rule. The “Not on Gamstop” illegal gambling phenomenon is proof of this. Since Yield Sec first raised the alarm on the illegal gambling reality in Great Britain in 2022, and continuing to date, next to nothing effective or meaningful has been done about this by those with the marketplace duty to do so.

What is Illegal Online Gambling?

Illegal online gambling refers to any gambling service that is not authorized, licensed, or regulated under the laws of a jurisdiction, but which targets, is accessible to, and conducts transactions with consumers in that jurisdiction.

If you don't understand illegal online gambling, you don't understand the total online gambling marketplace.

Data: Yield Sec Follows The Audience



YIELD SEC™
EIGHT ECOSYSTEM ESSENTIALS:
DATA SOURCES WE ASSESS

Yield Sec Methodology: How We Do It

OUR PROCESSES - USING HUMAN SPECIALISTS, MACHINE LEARNING, AND ARTIFICIAL INTELLIGENCE - ARE FOCUSED UPON YOUR MONETIZATION AND RESULTS.

**ALL OF
THE AUDIENCE**



COUNT
UNIQUE USERS AND DESTINATIONS

**ALL OF
THEIR ACTIVITY**



CLOCK
DWELL TIME AND ACTIVITY

**ALL OF
THE TIME**



CONFIRM
HUMAN USERS ONLY.
NO CRAWLERS, SPIDERS, BOTS

YIELD SEC IS RETAINED ON A CONFIDENTIAL BASIS BY LEGAL STAKEHOLDERS ACROSS THE ONLINE GAMBLING ECOSYSTEM - OPERATORS, GOVERNMENTS, LAW ENFORCEMENT, REGULATORS AND MORE.





YIELD SEC™

GREAT BRITAIN

Yield Sec FACTSHEET: Great Britain Online Gambling Marketplace 2024

LEGAL GAMBLING OPERATORS

2,335

LEGAL SPORTS BETTING
AND CASINO OPERATORS
ACTIVELY TARGET GREAT BRITAIN

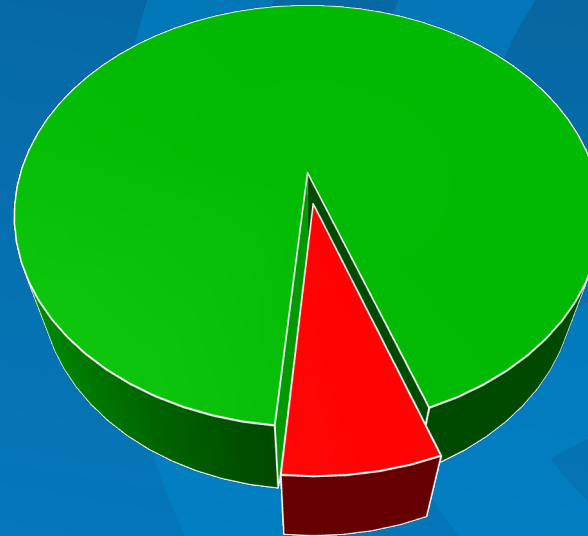
AFFILIATES PROMOTING LEGALS

8,612

AFFILIATES
PROMOTE ONLY LEGALS
THAT ACTIVELY TARGET GREAT BRITAIN

**GROSS GAMBLING REVENUE 2024
TOTAL: £8.2 BILLION**

**LEGAL 93%
£7.6 BILLION**



**ILLEGAL 7%
£583 MILLION**

ILLEGAL GAMBLING OPERATORS

728

ILLEGAL SPORTS BETTING
AND CASINO OPERATORS
ACTIVELY TARGET GREAT BRITAIN

AFFILIATES PROMOTING ILLEGALS

1,631

AFFILIATES
PROMOTE ILLEGALS
THAT ACTIVELY TARGET GREAT BRITAIN

Yield Sec FACTSHEET: Great Britain Online Gambling Marketplace **2025 First Half**

LEGAL GAMBLING OPERATORS

2,244

LEGAL SPORTS BETTING
AND CASINO OPERATORS
ACTIVELY TARGET GREAT BRITAIN

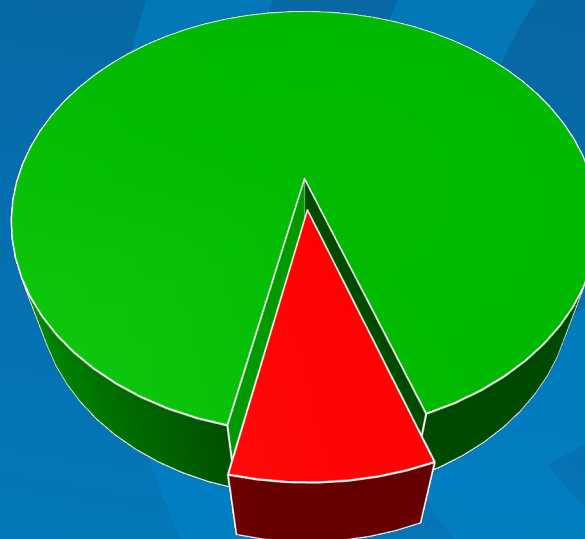
AFFILIATES PROMOTING LEGALS

6,934

AFFILIATES
PROMOTE ONLY LEGALS
THAT ACTIVELY TARGET GREAT BRITAIN

GROSS GAMBLING REVENUE 2025 FIRST HALF
TOTAL: £4.3 BILLION

**LEGAL 91%
£3.9 BILLION**



**ILLEGAL 9%
£379 MILLION**

ILLEGAL GAMBLING OPERATORS

531

ILLEGAL SPORTS BETTING
AND CASINO OPERATORS
ACTIVELY TARGET GREAT BRITAIN

AFFILIATES PROMOTING ILLEGALS

1,172

AFFILIATES
PROMOTE ILLEGALS
THAT ACTIVELY TARGET GREAT BRITAIN

Great Britain: A “Beacon” for Global Online Gambling Marketplaces



GREAT BRITAIN

Two decades of legal and regulated online gambling in Great Britain, with a highly competitive marketplace, have seen Great Britain emerge as a global leader in legal and regulated gambling.

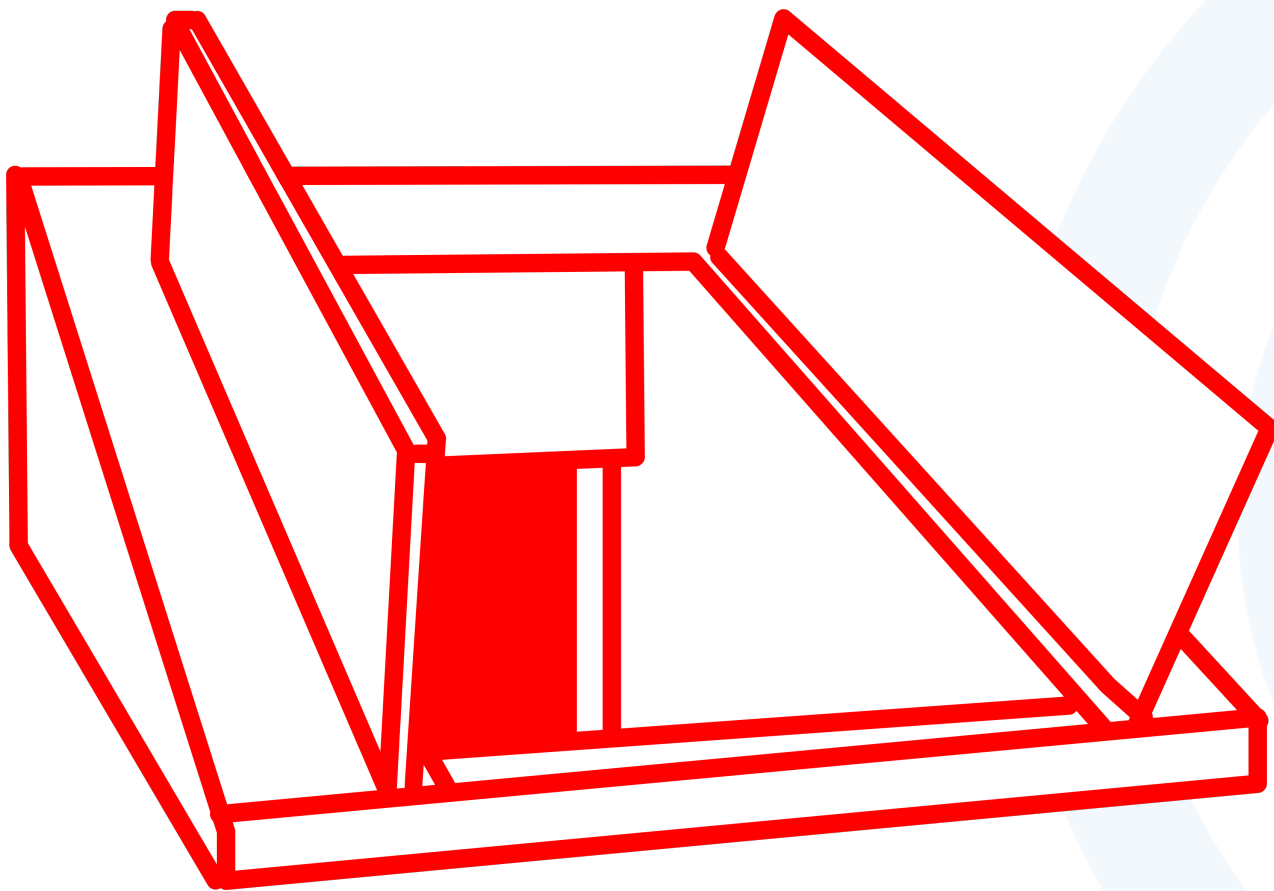
The vast majority of global marketplaces look to Great Britain, and the practices of its legalization and regulation, as setting the rulebook on how to “channelize” the marketplace effectively.

But Great Britain has specific historic, cultural and competitive reasons for its long-thought minimal share of illegal gambling penetration. Global marketplaces copying the Great British model have failed to replicate anything like Great Britain’s legal versus illegal split.

What about Great Britain itself – have laws and rules prevented crime from entering online illegal gambling?

Not quite.

Great Britain: The Black-Market Basement



The facts of Great Britain's legal and regulated marketplace, with high costs of entry for legal operators, almost act as the signpost to one destination for crime: the black-market basement.

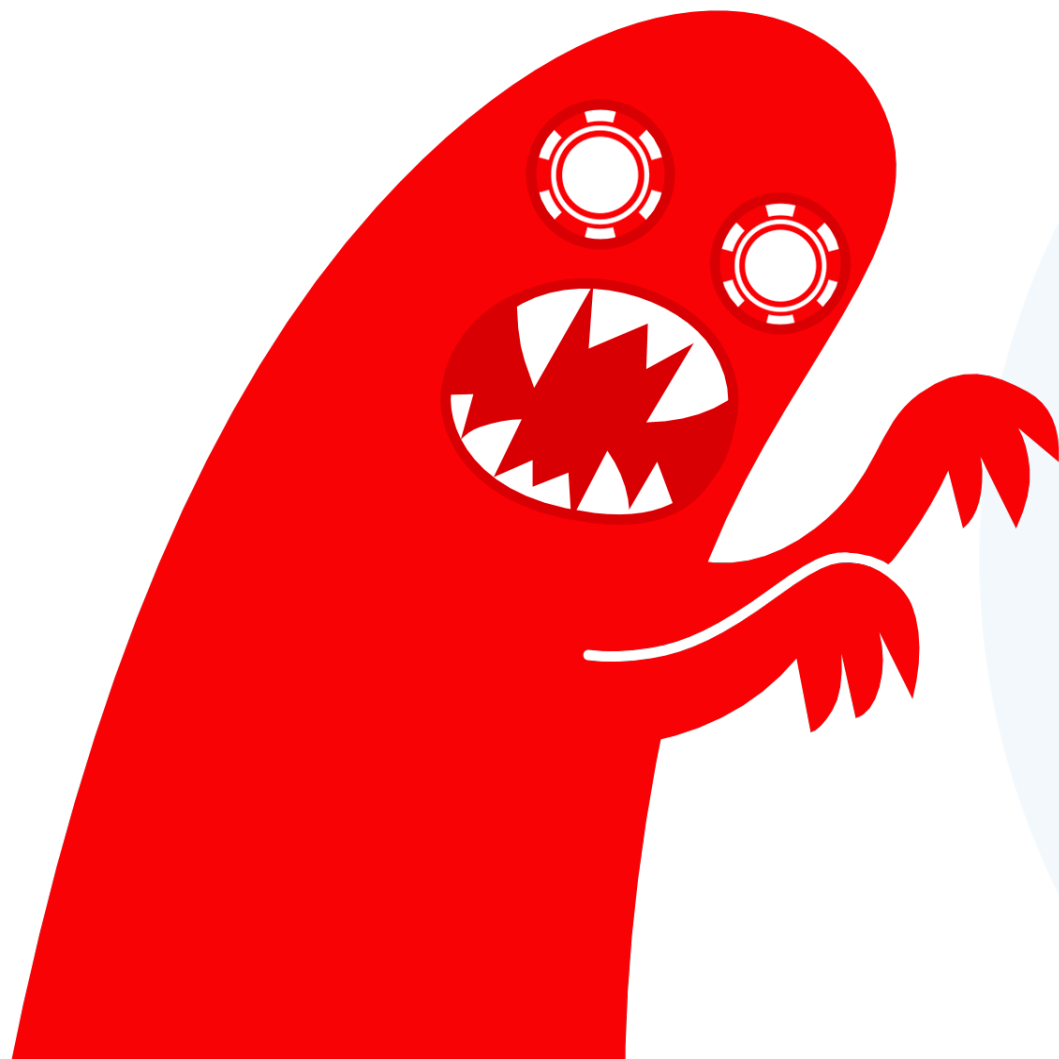
What's going on in the black-market basement?

Vulnerability Victimization across under 18s and self excluded players - audiences with no legal options and no other choice than illegal operators.

Crime doesn't want to pay

The reality of Great Britain's highly expensive-to-enter marketplace, where a budget of £10,000 per week on just one of the ecosystem essentials - such as Search - will not necessarily deliver you profitability. Crime takes the path of lowest spend and least resistance. That path has led them to construct a growing niche in a black-market basement beneath one of the world's busiest and most lucrative online gambling marketplaces.

Great Britain: The “Black-Market Boogeyman”



There is a black-market myth and an illegal gambling reality in Great Britain.

The Black-Market Myth:

All audiences for online gambling are being lured to the “black-market”, but illegal operators do not seriously try to compete with legal brands in Great Britain – it would be far too expensive for them.

The Illegal Gambling Reality

Two vulnerable audiences – under 18s and self excluded players – drive the volume for Great British Illegal Gambling.

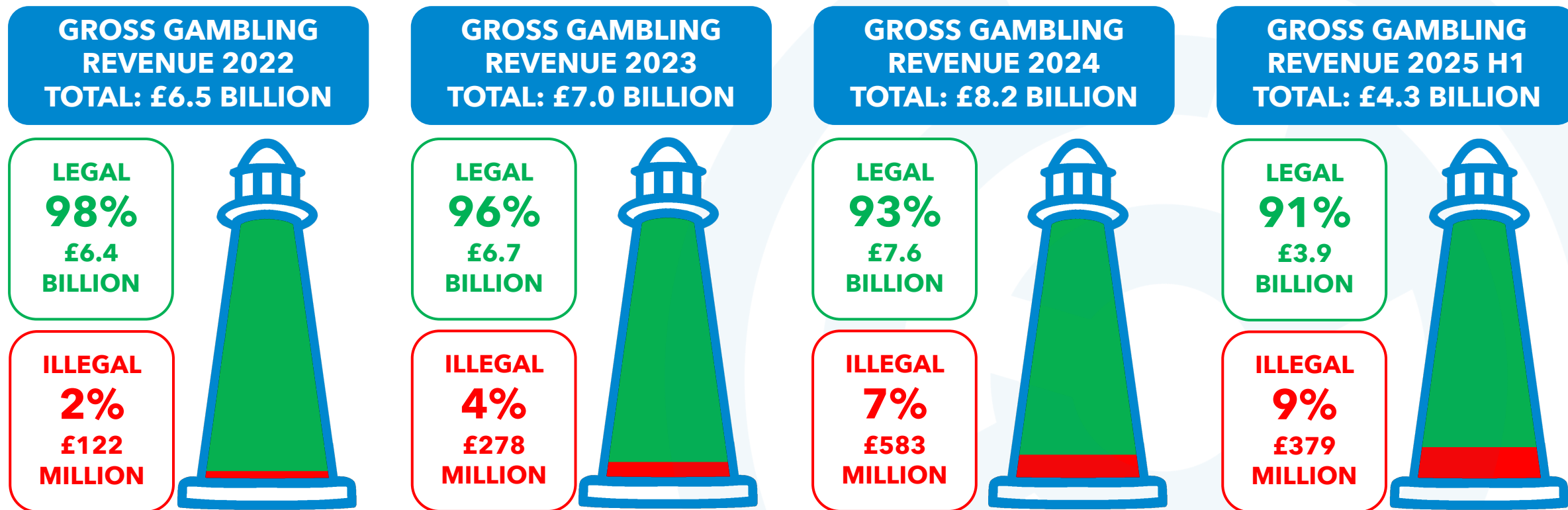
“Not on Gamstop” is the prime driver.

Why?

Because it is the cheapest and most effective recruitment path for illegals in the expensive GB marketplace – it is how they came to Great Britain, in 2020, when Yield Sec first detected it, and how they spread across many new subsets for “Not on Gamstop” versions: Casino, Sports, Poker, Slots, etc.

From current online marketplace monitoring and analysis, there is no “black-market boogeyman” significantly preying upon mainstream audiences in Great Britain.

Great Britain: Year on Year Growth



2022 - 2024 VALUE GROWTH RATES

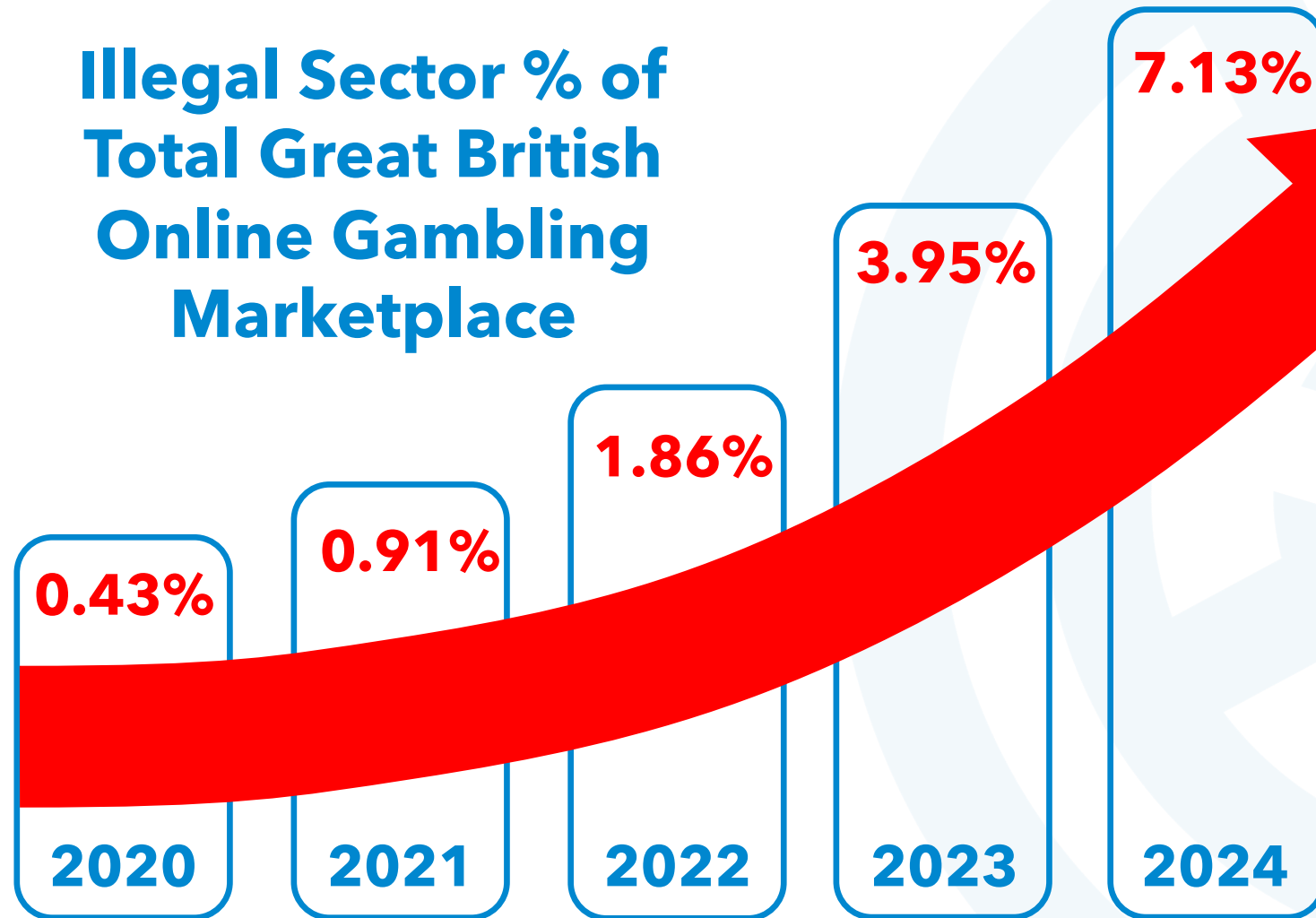
TOTAL: 26% GROWTH

LEGAL: 19% GROWTH

ILLEGAL: 378% GROWTH

Great Britain: Illegal Gambling Share

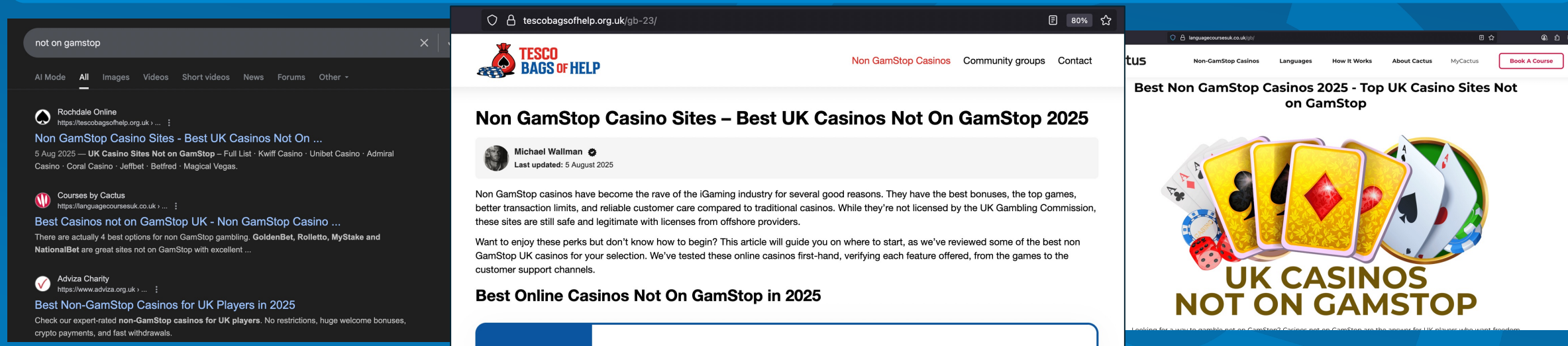
**Illegal Sector % of
Total Great British
Online Gambling
Marketplace**



**ILLEGAL
GAMBLING
MARKET
SHARE IN
GREAT
BRITAIN HAS
NEARLY
DOUBLED
EVERY YEAR
SINCE 2020.**

Great Britain: Not on Gamstop? Search

When Yield Sec first publicized the "Not on Gamstop" phenomenon in January 2023, there were thousands of Google results for relevant and targeted search terms.



NOW?

In Great Britain, via unrestricted online access without a VPN, there are:

- MILLIONS OF RESULTS ACROSS GOOGLE AND SOCIAL FOR NOT ON GAMSTOP AND SIMILAR**
- THOUSANDS OF AFFILIATE OPTIONS FOR NOT ON GAMSTOP**
- HUNDREDS OF NOT ON GAMSTOP ILLEGAL OPERATOR OPTIONS**

Great Britain: Under 18s and Self-Excludes

gambling sites



Adviza Charity
https://www.adviza.org.uk > ...

Best Non-GamStop Casinos for UK Players in 2025

Check our **expert-rated non-GamStop casinos for UK players**. No restrictions, huge welcome bonuses, crypto payments, and fast withdrawals.



The Sun
https://www.thesun.co.uk > Betting > Casino

Best online casinos | Top 20 UK casino sites (August 2025)

3 days ago — Let's take a look at the **top UK casinos**, what they do well, and, importantly, how you can get maximum value from your time online.

usyk dubois watch online free



Reddit · r/minecraftbuilders
1 comment · 5 hours ago

HERE'S*! WAY TO WATCH Oleksandr Usyk vs Daniel ...

How to watch Usyk v Dubois 2 fight for free on DAZN through your TV. ... Dubois 2-led card, which will stream live online via DAZN at 2 ...



talkSPORT
https://talksport.com > boxing > oleksandr-usyk-vs-dani...

Where to watch Oleksandr Usyk vs Daniel Dubois 2 for free

7 hours ago — Usyk vs Dubois 2: talkSPORT coverage. talkSPORT will have live coverage of the undisputed world heavyweight title fight. Our commentary team ...



Knight Alzheimer Disease Research Center
https://knightadrc.wustl.edu > app > formidable PDF

[Ways To Watch Boxing] Usyk vs Dubois LIVE Streams ...

3 hours ago — [Ways To Watch Boxing] Usyk vs Dubois LIVE Streams. Free Online ON Official Tv Channel. 20 July, 2025. The boxing world is set to witness another epic ...

www.adviza.org.uk/gb/

ADVIZA

Best Non-GamStop Casinos 2025 - New Sites not on GamStop UK



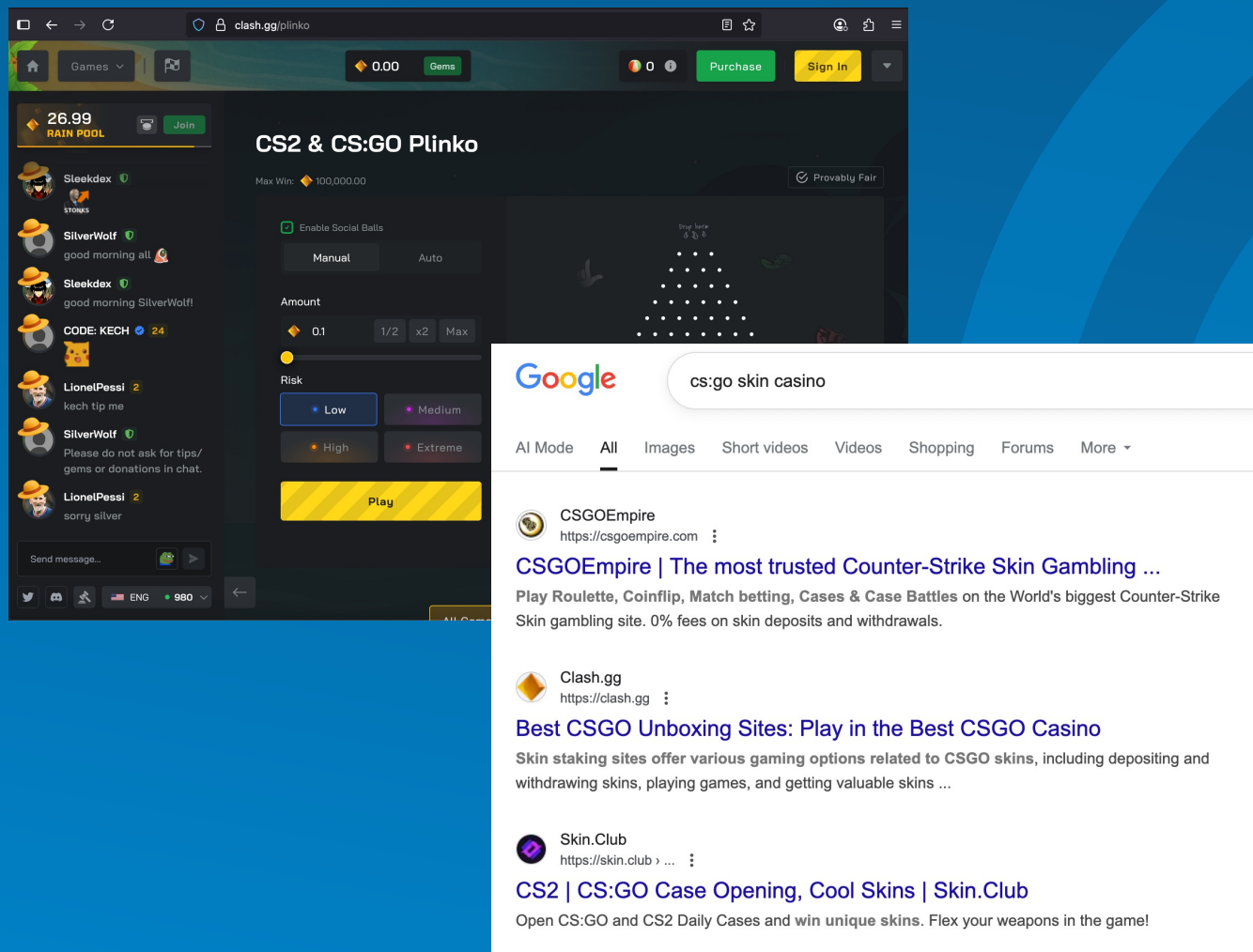
Check out these top 10 non-GamStop casinos that are open to self-excluded UK players. These brands stand out with their registration ease, huge bonuses up to 500%, and rich libraries from 150+ top developers.

Our team has tested numerous casinos not on GamStop, and on this page, we recommend the best options that accept British players. Here are the 10 trusted non GamStop casinos every gambler must check in 2025:

These two areas became the first forms of regulation evasion that crime targeted in Great Britain's online gambling marketplace - a phenomenon Yield Sec has labelled "Vulnerability Victimization":

- The ruthless targeting of self-excluded players through "Not on Gamstop" marketing.
- The cynical and widespread presence of gambling for under 18s behind many online content and engagement platforms that are popular with youth audiences.

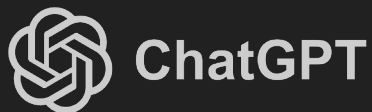
Great Britain: Video Game Platforms



All online video game platforms feature prominent under 18 audiences. These platforms and their community marketplaces act as recruitment grounds for illegal gambling, often tied to games with significant underage portions to their player bases. As an example, CS:GO “skin casinos” have grown in popularity since 2020.

CS:GO “skins” (in-game cosmetics) are obtained from random drops after games or through crate unboxing. The crates need “keys” to open, which can be purchased for real money. These skins have a monetary value determined in the community marketplace. On CS:GO skin casino sites, skins essentially function as chips in a casino with a monetary value.

Great Britain: Not on Gamstop? LLMs



not on gamstop

I should clarify: if you're searching for "not on GamStop" sites, that usually means gambling operators who deliberately avoid the UK self-exclusion system. Many of these are **unlicensed in the UK** and operate outside of the Gambling Commission's rules.

ChatGPT 5 ▾

↑ Share

If your question is about finding safe ways to gamble despite being excluded, the safest route is to only use **UK-licensed sites** (all of which must be on GamStop).

👉 If you're looking to **reverse or adjust a GamStop exclusion**, that isn't possible until your chosen period ends. You can, however, use the time to focus on other activities or—if gambling has become harmful—access support like:

- GamCare ↗ (24/7 helpline and chat)
- NHS gambling treatment services ↗
- BeGambleAware ↗

Do you want me to check if you're looking for information on **legal alternatives to gambling while on GamStop** (like lotteries, skill-based games, or investments), or whether you specifically meant unlicensed "not on GamStop" casinos?

While it doesn't provide a direct link to Gamstop, ChatGPT does the job right - it understands "Not on Gamstop" is about illegal gambling and does not link you to any illegal gambling operators. Google AI also delivers some advice about how "Not on Gamstop" covers illegal gambling operators . . . but then goes on to link to them.

ChatGPT got this right without even being told to do so - why can't Google?



AI Mode All Images Videos Short videos More ▾

17 sites

Best Non Gamstop Casinos in the UK in 2025 - Esports Insider

Aug 27, 2025 — Once registered, you won't be able to access any gambling websites licensed by the UKGC (UK Gambling Commission) until your exclusion...

Esports Insider

GAMSTOP - Gambling Self-Exclusion Scheme

FREE ONLINE SELF-EXCLUSION. GAMSTOP helps you control your online gambling. Once registered you will be prevented from using gambling websites...

GamStop

Non GamStop Casinos UK - Best Casino not on GamStop 2025

Aug 28, 2025 — Discover the best Non GamStop casinos in the UK for 2025. Play at trusted sites not on GamStop with big bonuses, fast payouts, and no UK...

Shipwreck Treasure Museum

The Gamstop Number: On their Own Numbers

532,484
REGISTERED GAMSTOP
SELF-EXCLUDED
GAMBLERS

NEARLY 1% OF GREAT BRITAIN'S
POPULATION

LOSS PER YEAR
(APPROXIMATE)

£851.85

AVERAGE ONLINE CUSTOMER
LOSSES PER YEAR (SOURCE: GC)

ON THE BASIS OF
GAMSTOP AND GC
NUMBERS, THE TOTAL
LOSSES BY SELF-EXCLUDED
PLAYERS WOULD BE:

£113.4
MILLION

GGR TO ILLEGALS ONLY

25%
RECIDIVISM RATE*

AS REPORTED BY GAMSTOP SURVEY
AND ANNUAL REPORT 2024

GAMBLING
COMMISSION

GAM

STOP

online

The Gamstop Number: Losses to Illegals are Much Higher

532,484

**REGISTERED GAMSTOP
SELF-EXCLUDED
GAMBLERS**

NEARLY 1% OF GREAT BRITAIN'S
POPULATION

**LOSS PER YEAR
(APPROXIMATE)**

£2,000

IN LINE WITH THE APPROPRIATE TIER
FROM THE NATCEN STUDY - PATTERNS
OF PLAY 2022

**ESTIMATED LOSSES
BY SELF-EXCLUDED
PLAYERS**

£426

MILLION

GGR TO ILLEGALS ONLY

40%

RECIDIVISM RATE

ADJUSTING FOR AN UNDER-REPORTING
BIAS ACROSS PAID SURVEYS

73%

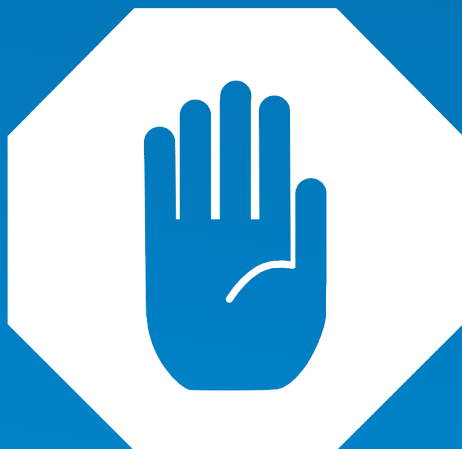
OF THE GB ILLEGAL GAMBLING
GGR VALUE IN 2024

Great Britain: Two Core Audiences Drive Illegal Gambling

UNDER 18s



**SELF
EXCLUDES**



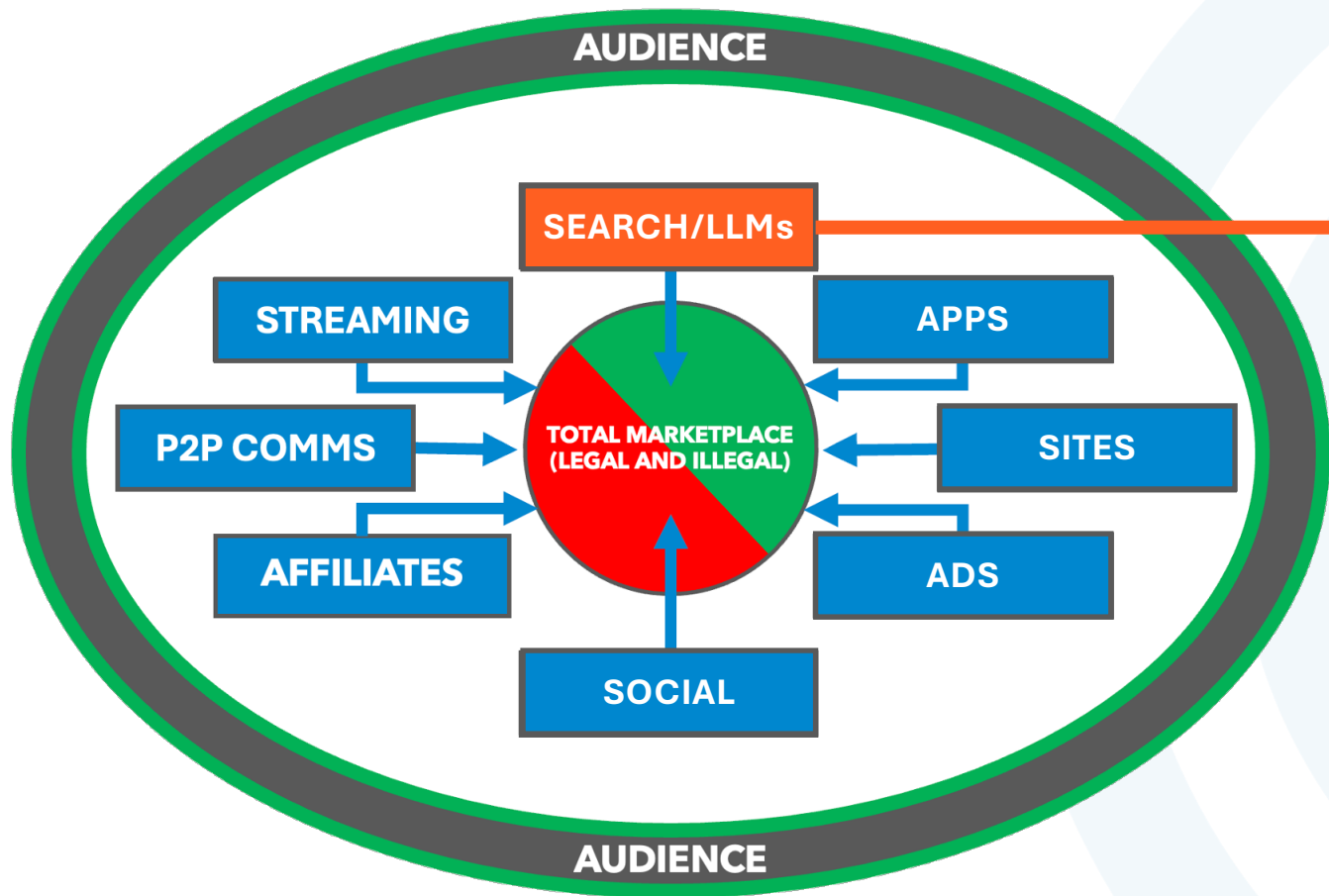
84%

**OF GB ILLEGAL
GAMBLING
CONTENT**

IS DRIVEN BY THE "NOT ON GAMSTOP"
PHENOMENON AND RELATED ACTIVITY

**"NOT ON
GAMSTOP"
IS SUCH A
POPULAR
TERM IT IS
EVEN USED
BY UNDER
18s AS A
"CATCH ALL"
FOR ILLEGAL
GAMBLING.**

Great Britain: Taking Back Control



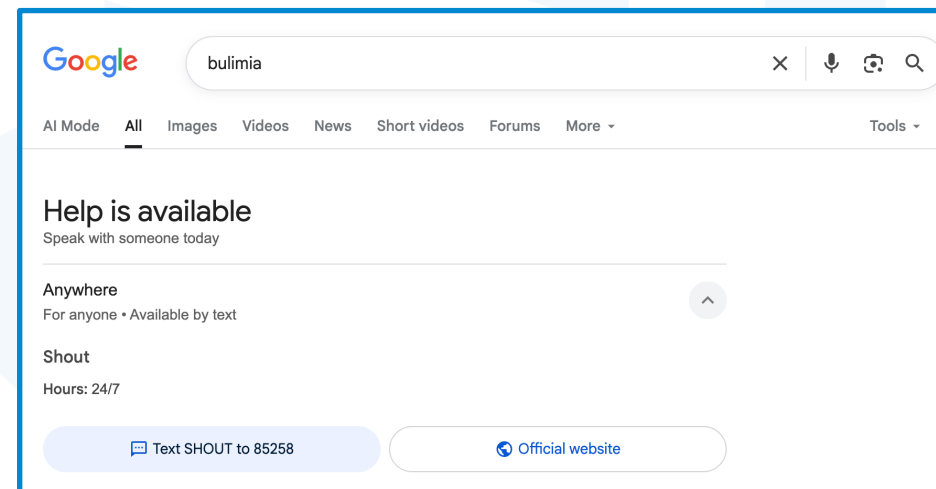
ECOSYSTEM ESSENTIAL SUGGESTION: SEARCH/LLMs

How can Search / LLMs be optimized for enforcement against the illegal sector?

Restrict results.

The only results that should appear for "Not on Gamstop" and related terms:

- "Help is available", as with bulimia and anorexia
- "Not on Gamstop" definition - it is all illegal gambling
 - Mental health services links
 - Treatment services links



CONCLUSION

When I commissioned this report, I anticipated it would show that illegal online gambling was increasing. This risk was not a deterrent to proceeding, as it is vital to understand how legal and illegal online gambling-related harm is occurring.

Yield Sec published a report on the EU marketplace just prior to this report being published, but the EU marketplace is very different than the GB marketplace. The Betting and Gaming Council (BGC) and their allies rushed to share the news of how large the illegal share of the EU marketplace is, in a misleading attempt to influence the GB political debate.

This GB report shows the illegal sector's disregard for the harm it causes. It shows this harm is increasing. This is a global problem, regardless of the ratio of legal to illegal, in every jurisdiction.

The reaction of the BGC to the EU report will be in sharp contrast to the BGC reaction to this report. There is another almost-global problem: some trade bodies and many of their members have got away with misleading representations for far too long.

Media, politicians and the public need to distinguish between representations which are evidence-based, and representations which are speculation-based.

An explanation of my US campaigning can be accessed [here](#).

Compiled by Derek Webb, founder and funder of the Campaign for Fairer Gambling

Protecting Online Borders. Defending the Economy. Minimizing the Harm.



YIELD SEC™

NOTES

Yield Sec: Notes on this Report

The following key notes apply across Yield Sec data:

SIMPLE FINANCIAL DEFINITIONS

"Handle" - relates to the value of bets placed by consumers with online gambling operators. "Hold" - relates to the value left behind with online gambling operators, after customer winnings have been repaid. "GGR" - relates to Gross Gaming Revenue, or Customer Bets MINUS Customer Winnings EQUALS Gross Gaming Revenue.

PRODUCTS COVERED BY THE DATA IN THIS REPORT: SPORTS BETTING (INCLUDING PREDICTORS) AND CASINO (INCLUDING POKER)

Throughout this report, online sports betting includes both traditional online sports betting and predictors. Within legal online sports betting, all legal predictors are included. Within illegal online sports betting, all illegal predictors are included. Crypto products are included within sports betting and casino, and their respective legal or illegal positions. Products not covered by the data in this report: daily fantasy sports, sweepstakes, social casinos, prize draw contests, lotteries.

ONLINE ONLY

Yield Sec covers the total online marketplace, including both legal and illegal online gambling. No retail or land-based data is included in our reporting.

TARGETING AND TRANSACTING

Only operators who actively target the jurisdictional marketplace through audience profiling, advertising, affiliate deals, audience accessibility (with and without a VPN) and featuring verified local resident payment abilities are classed and included as "illegal" or "unsanctioned" operators if they do not have local legal licensing for the jurisdiction they are taking revenue from.

AVAILABLE BUT NOT TRANSACTING

Operators who have an accessible website/app but without any active commercial ability (to place bets, make transactions and affect revenue) are not classed or included as "illegal" or "unsanctioned" operators.

GAMBLING OPERATORS

Each individual, active, transacting website or app that targets a specific marketplace is counted as a "gambling operator" for that jurisdiction.

MIRRORS AND REDIRECTS

All active and transactable destinations for illegal gambling operators are included in the number of total destination domains - the count of illegal gambling operators. Each individual, active, transacting website or app that targets a specific marketplace with clear domain strategy redirects and mirrors - IllegalGambling.com, IllegalGambling123.com, IllegalGamblingABC.com, etc. - is included as a separate illegal gambling operator result.

ACCURACY

Our analysis derives from data obtained from our online surveillance as well as from third party licensors. Our assessment of large complex online marketplaces is limited by the availability and completeness of data. We are confident, however, that our platform provides by far the best analysis of online marketplaces possible.

Yield Sec: Glossary, 1 of 2

What is Illegal Gambling? Illegal online gambling refers to any gambling service that is not authorized, licensed, or regulated under the laws of a jurisdiction, but which targets, is accessible to, and conducts transactions with consumers in that jurisdiction.

Audience: All potential, unique human beings in a specific jurisdiction using online services (including under 18s).

Activity: All states of online behavior, everything from browsing (looking) through to buying (transacting).

Total Online Gambling Marketplace: There is only one marketplace in a jurisdiction. Unfortunately, it features two industries: one legal, one illegal. To get to total, you must consider and add legal plus illegal.

Black-Market: The common name for illegal operators. Why don't we use it? It's misleading - there is no separate marketplace - and "black-market" is the name crime gave itself to make it appear somehow distinct. It is not distinct: it is simply stealing money.

Illegal: Meaning you are not licensed in the jurisdiction you are targeting, accessible in, and transacting with.

Interaction/Interacting: Consumer engagement with an illegal operator. The consumer is doing more than simply "seeing" content: a consumer has *engaged* with it by clicking on ads, registering with websites, liking social posts, etcetera, anything that has amended their current and future experience online - due to the algorithms and cookies - in favor of greater future exposure with illegal operators.

Affiliates: For-profit groups across websites, apps and social media which engage audiences with content including reviews, comparisons, special offers, promotions, discounts, and news, to move that audience on to commercial opportunities with gambling operators in return for a fee or a share of customer transactions, and often both.

Yield Sec: Glossary, 2 of 2

Audience Exposure: The impact of gambling and related content upon the audience across a blended view of search, social, streaming, websites and apps, peer-to-peer communications, and direct offers via email, text and referral. The audience exposure measure is a good “early warning indicator” of where GGR will land in 6-12 months’ time.

Traffic Channelization: All visits across the entire marketplace broken out by share of operator and legal or illegal.

Unique Audience Share: Unique audience member visits on an operator-specific basis, broken out by share.

Traffic Volume: The volume of visits made by the online audience to online opportunities.

Uniques Volume: The volume of unique human beings using specific online services.

Visitors: Unique human beings visiting pages across a site – no matter the pages they visit, they are still one unique user over the time period.

Visits: The pages unique human beings visit across a site, and the traffic created from this. One unique human will visit many pages on a site for different products, processes, bets, games, etc., and each will visit by a factor of X times per month.

Mirrors and Redirects: Websites and apps used to reach audiences and avoid destination blacklists and blocklists – effectively, “back doors” into illegal operator destinations that the audience will have no knowledge concerning.

Vulnerability Victimization: Deliberate targeting and exploitation of audiences with no legal options or choices - for example, under 18s and excluded gamblers (whether self-excluded or via judicial exclusion).



YIELD SEC™

ADDITIONAL DATA

EXPLANATION OF ADDENDUM

The narrative of the bookmakers and the Betting and Gaming Council (BGC) is that horserace gamblers are turning to the black market. This theory relies on the rollout of financial risk checks deterring some gamblers. However, there is no evidence that the checks are being carried out uniformly across all sports betting and gaming activity.

If there was a dramatic uptick in the illegal sector for sports betting, it would show in the data. The fact is that the only monitored audience activity conducted on the GB online gaming marketplace, in this report, shows the opposite: illegal gaming across casino products is by far the dominant driver of all illegal gambling GGR, far in excess of the slight casino dominance in the legal sector.

The GB reality is this:

- The illegal sector is targeting self-excluded gamblers. Gaming across casino products is more addictive than sports betting. The illegal sector sales pitch is primarily for "Casinos not on GamStop" rather than "Bookmakers not on GamStop". It is unfortunate that GamStop appears powerless to prevent the abuse of their own IP rights.
- It is harder for illegals to compete in the sports betting sector against established legal brands, compared to the gaming/casino sector. Legal bookmakers are already engaged in fierce pricing competition against each other, and will continue to be so, regardless of how regulations and tax rates change.

Compiled by Derek Webb, founder and funder of the Campaign for Fairer Gambling.

Protecting Online Borders. Defending the Economy. Minimizing the Harm.

Great Britian: Sports Betting and Casino Splits 2024

GB ONLINE GGR	LEGAL GGR	ILLEGAL GGR	TOTAL	% OF LEGAL GGR	% OF ILLEGAL GGR
SPORTS BETTING 2024	£3.14 BILLION	£153 MILLION	£3.3 BILLION	41.4%	26.2%
CASINO 2024	£4.45 BILLION	£430 MILLION	£4.9 BILLION	58.6%	73.8%
TOTAL	£7.59 BILLION	£583 MILLION	£8.2 BILLION	100%	100%

Great Britian: Sports Betting and Casino Splits 2025 H1

GB ONLINE GGR	LEGAL GGR	ILLEGAL GGR	TOTAL	% OF LEGAL GGR	% OF ILLEGAL GGR
SPORTS BETTING 2025 H1	£1.6 BILLION	£96 MILLION	£1.7 BILLION	40.6%	25.4%
CASINO 2025 H1	£2.3 BILLION	£ 283 MILLION	£2.6 BILLION	59.4%	74.6%
TOTAL	£3.9 BILLION	£379 MILLION	£4.3 BILLION	100%	100%

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