

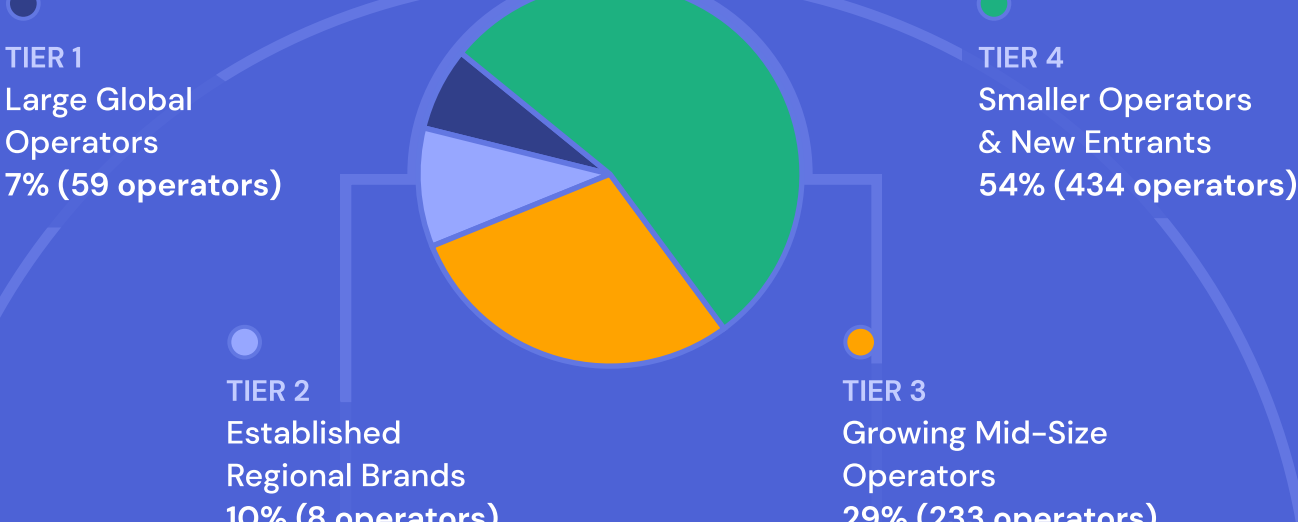
The Sports Betting Market at a Glance

A quick look at the global sports betting landscape



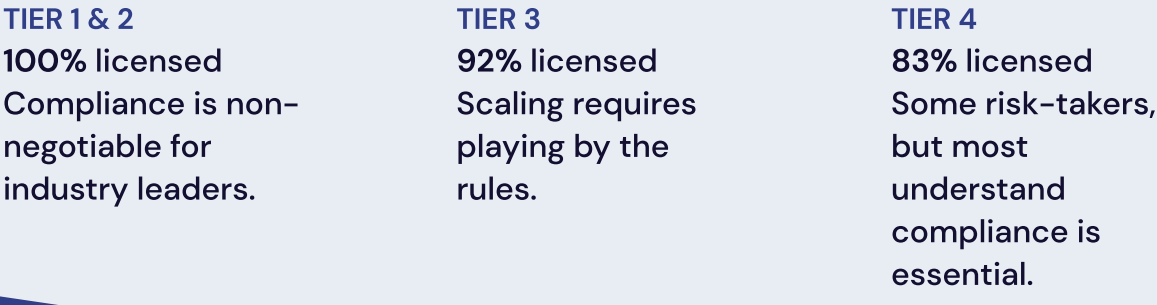
Market Breakdown: 807 Operators Studied

Operators are positioned into four distinct tiers based on market size and influence*:



* Beyond Tier 4: many micro-operators exist, but their impact is minimal so they not included in the study.

The Licensing Game: Compliance or Die



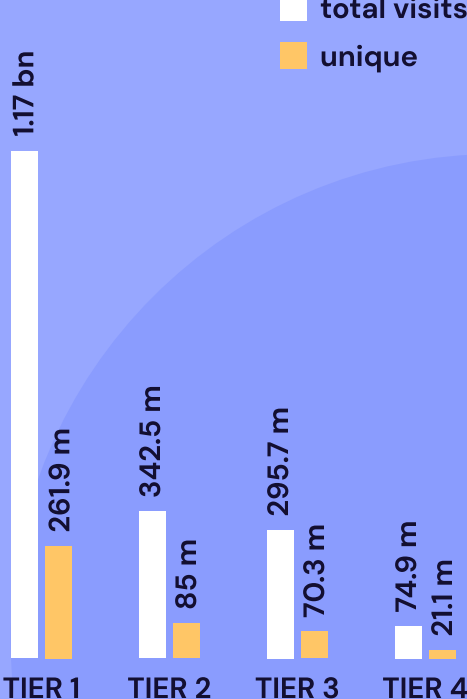
The Affiliate Trap:

Unlicensed operators often depend heavily on aggressive affiliate marketing. While affiliates are a strong acquisition channel, sustainable growth requires a mix of paid, organic, and direct traffic. With ad platforms tightening compliance rules, unlicensed brands risk stagnation while licensed operators secure long-term market dominance.

Web Traffic & Engagement

Operators in different tiers attract varying levels of traffic. Here's how web visits are distributed:

76.8% of all traffic comes from returning users, showing a strong reliance on repeat visitors!



Mobile App Adoption in Sports Betting

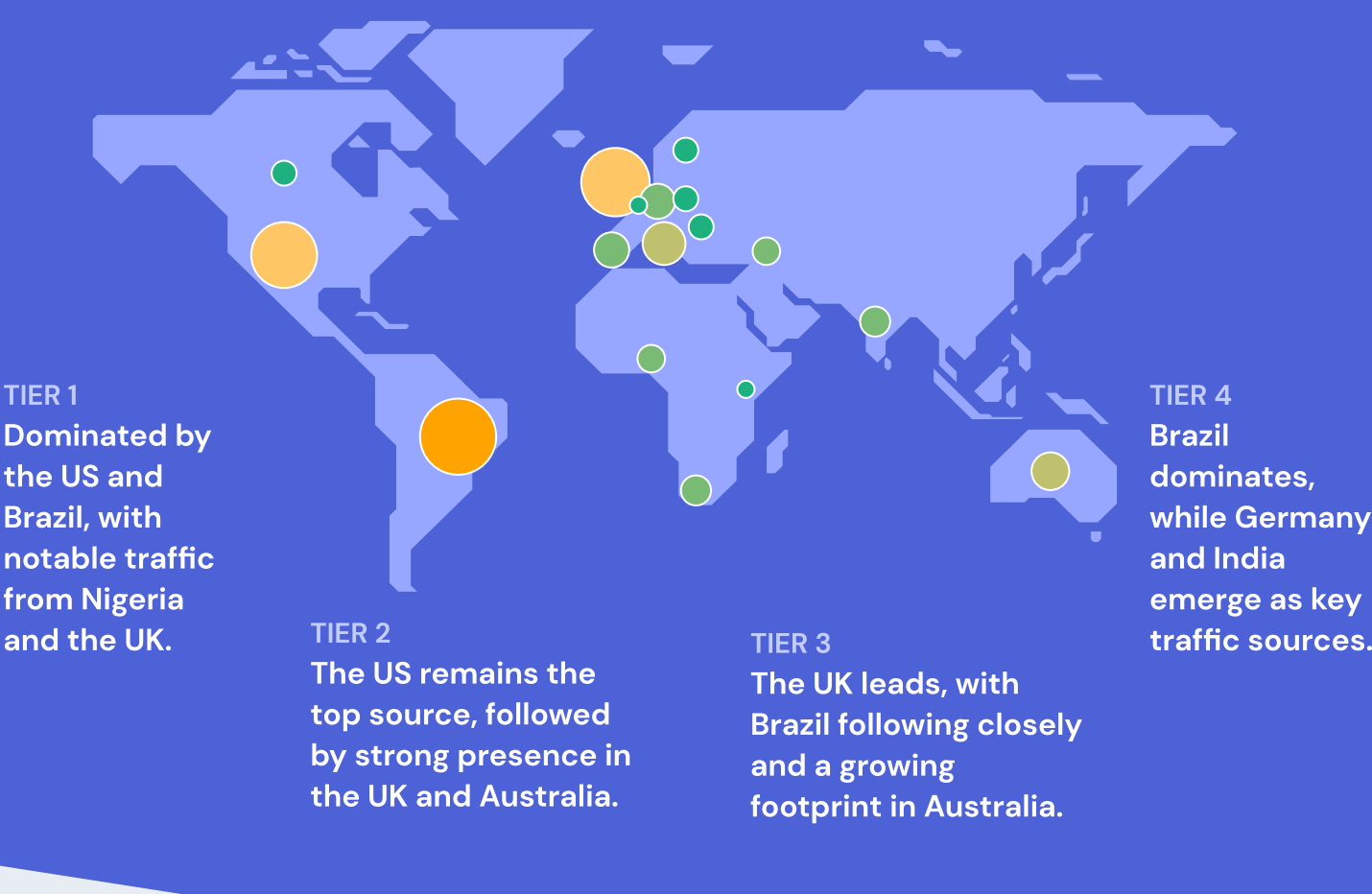
The shift towards mobile betting is evident, with 84% of all studied operators having a mobile app. However, adoption rates vary by tier:



Mobile-first strategies continue to dominate, yet there's room for growth, particularly among smaller operators.

Where is Sports Betting Traffic Coming From?

Market trends differ significantly by region. The three largest traffic sources for sports betting operators are Brazil, the United States, and the United Kingdom. However, their distribution across tiers varies:



5 93

Brazil stands out as the most engaged market across all tiers, presenting significant opportunities for operators looking to expand.