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# The Sports Betting Market at a Glance

A quick look at the global sports betting landscape



#### • LIVE

| Portland Trail Blazers @ Philadelphia 76ers |                    |
|---|--------------------|
| 2nd Quarter                                 | Total              |
| Portland Trail Blazers                      | 37                 |
| Philadelphia 76ers                          | 44                 |
| Portland Trail Blazers                      | Philadelphia 76ers |
| 2.22  | 1.66               |





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

## 

TIER 1 Large Global Operators 7% (59 operators)

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TIER 4 Smaller Operators & New Entrants 54% (434 operators)

## TIER 2

Established Regional Brands 10% (8 operators) TIER 3 Growing Mid-Size Operators 29% (233 operators)

\* 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

TIER 1 & 2 100% licensed Compliance is nonnegotiable for industry leaders.

TIER 3 92% licensed Scaling requires playing by the rules.

#### TIER 4

83% licensed Some risk-takers, but most understand compliance is essential.

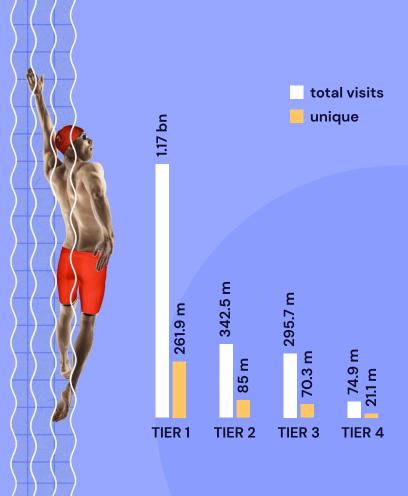
### The Affiliate Trap:

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.



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



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:



by strong presence in the UK and Australia. and a growing footprint in Australia.

> 1 100+ Number of Operators By Region

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

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