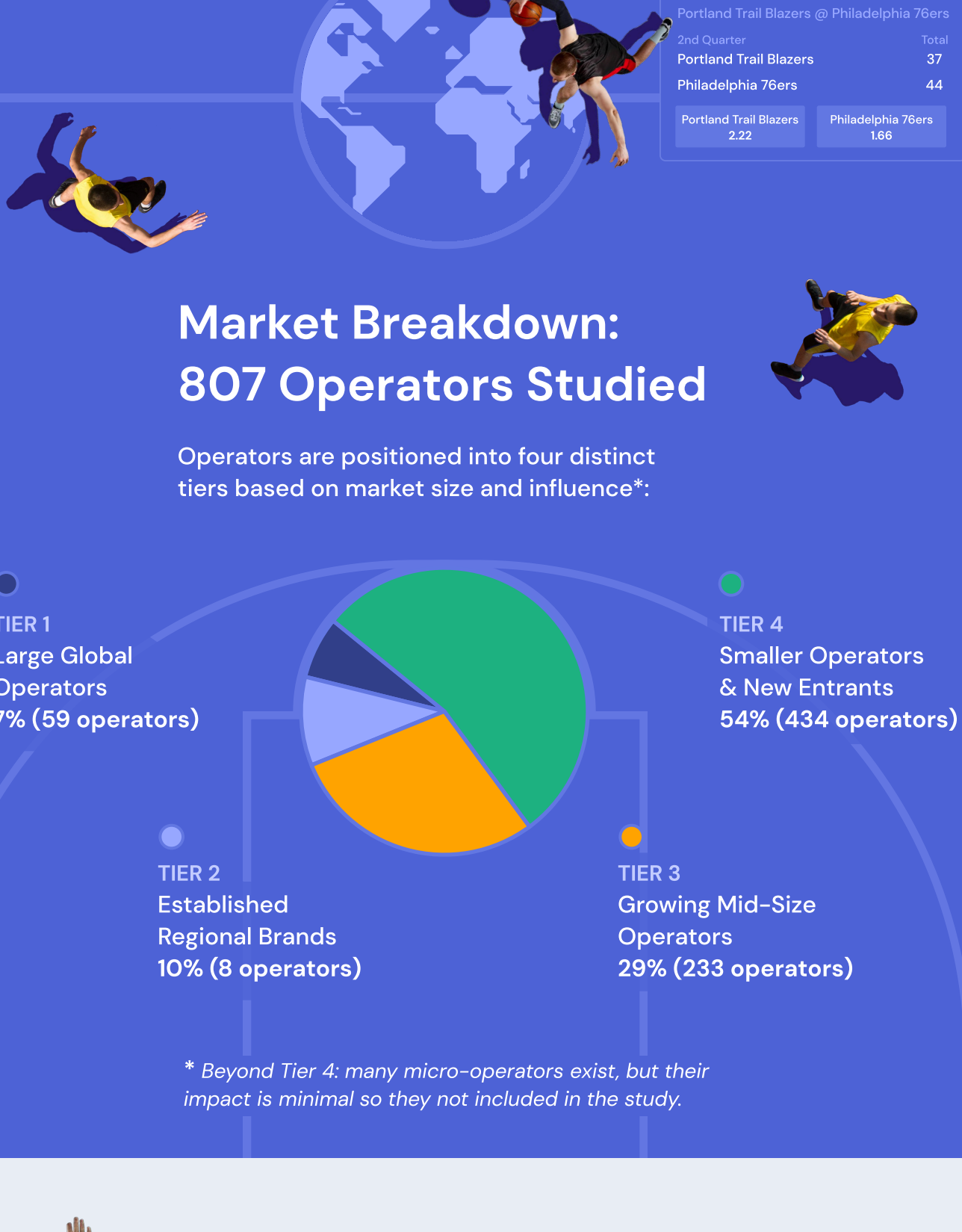
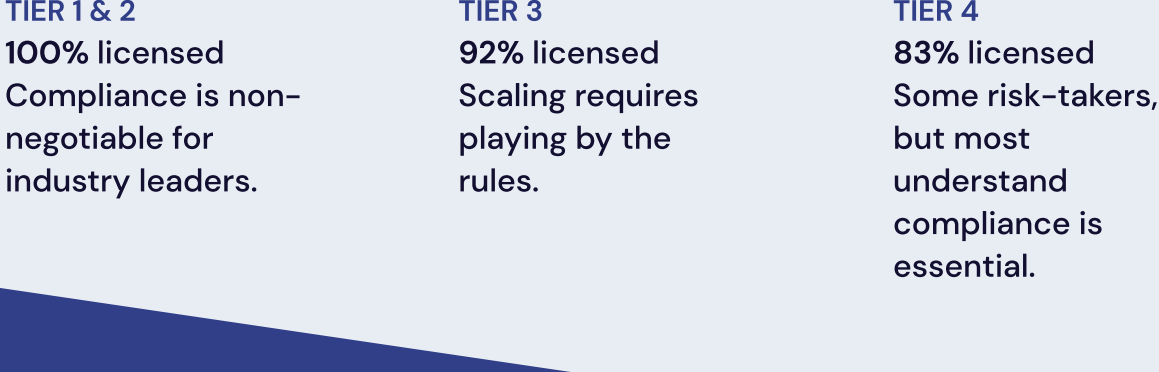


The Sports Betting Market at a Glance

A quick look at the global sports betting landscape



The Licensing Game: Compliance or Die



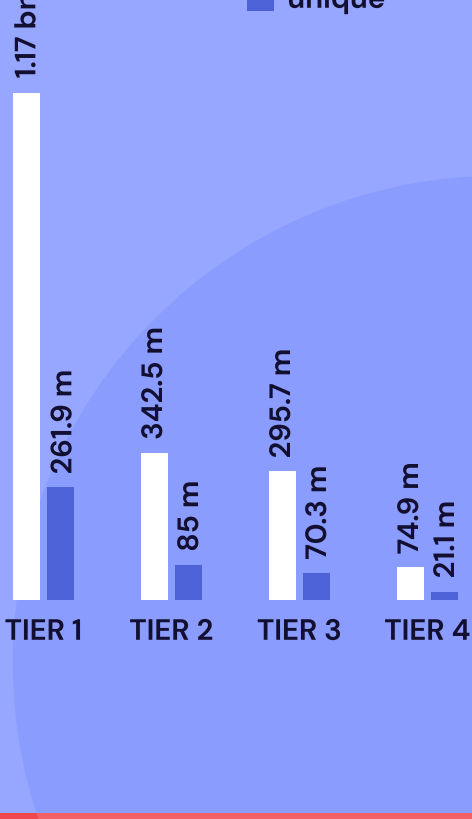
The Affiliate Trap:

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

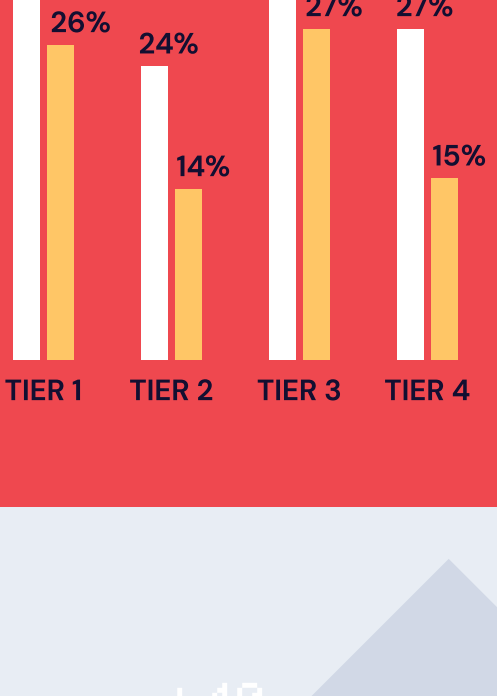
Operators in different tiers attract varying levels of traffic. Here's how web visits are distributed:

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



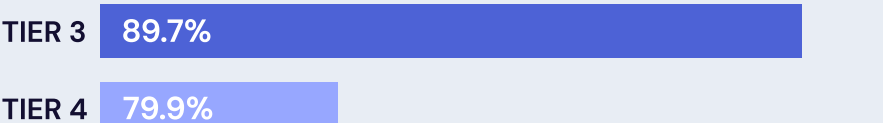
But here's the catch:

Returning users are eating paid media budgets. Here's the percentage of branded ad spend being wasted on users just logging back in:



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?

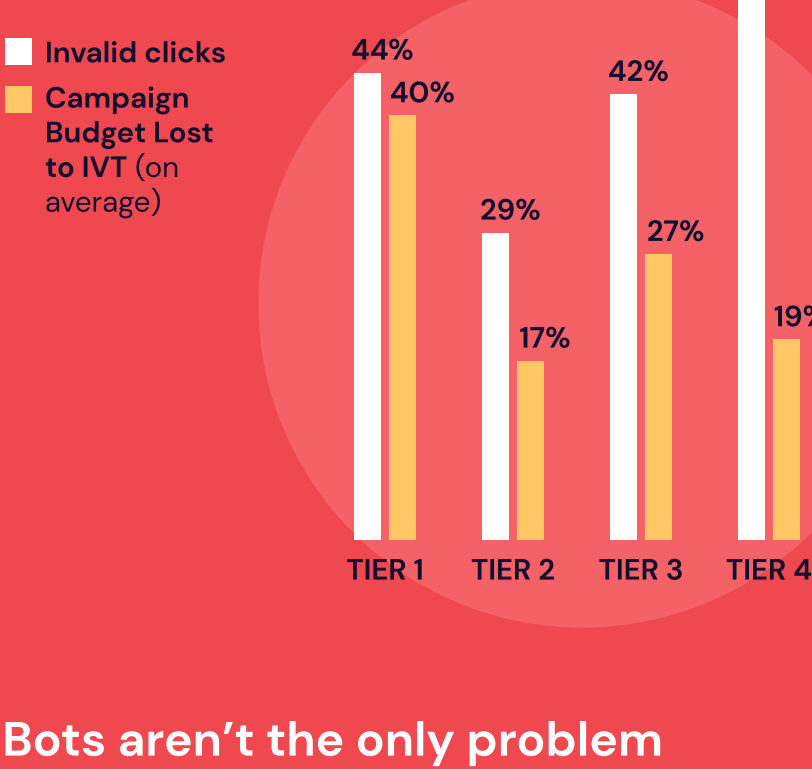
Market trends differ significantly by region. The three largest traffic sources for sports betting operators are Brazil, the United States, and the United Kingdom. However, their distribution across tiers varies:



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

Invalid Traffic (IVT): The Hidden Profit Killer

Paid traffic isn't always what it seems. Invalid traffic (IVT), from bots, bonus abuse scripts, and recycled users, can quietly drain budgets. Here's what TrafficGuard found across campaigns from 100+ operators:



Bots aren't the only problem

Returning users clicking on brand keywords, and crafty scripts targeting generic keywords, are distorting performance. Operators are bidding against themselves and paying for traffic that's already won, or never genuine to begin with.

Branded Campaign

Branded campaigns are heavily hit by returning users logging in via ads, not prospects.

vs.

Generic Campaign

Generic campaigns are wide open to fraud scripts, especially those targeting terms like "bonus bets".

Risks

Without proactive IVT protection, operators face inflated metrics, wasted spend, and distorted ROAS.

* Data sourced from TrafficGuard's study and real-world platform activity across 100+ operator campaigns.