

Sports Betting Trends Report

2024

Kambi

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Welcome

Welcome to Kambi's inaugural Sports Betting Trends Report – an analysis of the key trends shaping the sports betting market.

As the home of premium sports betting solutions, Kambi is uniquely positioned to offer unparalleled insights into the industry. Drawn from the 2024 data of Kambi's extensive global network of over 40 partners spanning six continents, this report offers a digestible snapshot into the market's dynamics throughout the last 12 months.

Whether you are looking to refine your sportsbook strategy or simply gain a deeper understanding of today's bettors, we hope this report serves as a guide to some of the industry's trends and opportunities.

Thanks for reading.

Simon Noy, SVP Trading, Kambi



Top markets on the Kambi network by region (compared to 2023)*

US and Canada

Most popular sports	Most popular events	Most popular events for first-time bettors
1. Basketball (1)	1. Super Bowl LVIII	1. Super Bowl LVIII
2. American football (2)	2. NFC Championship	2. Chiefs vs Ravens (week 1)
3. Baseball (3)	3. AFC Championship	3. Eagles vs Packers (week 1)
4. Soccer (4)	4. Chiefs vs Bills (divisional playoffs)	4. Dolphins vs Bills (week 2)
5. Tennis (6)	5. Packers vs 49ers (divisional playoffs)	5. 49ers vs Jets (week 1)

Latin America

Most popular sports	Most popular events	Most popular events for first-time bettors
1. Soccer (1)	1. Copa América 2024 final	1. Copa América 2024 final
2. Basketball (2)	2. Uruguay vs Colombia (Copa América 2024 SF)	2. Brazil vs Colombia (Copa América 2024 group stages)
3. Tennis (3)	3. Brazil vs Colombia (Copa América 2024 group stages)	3. Uruguay vs Colombia (Copa América 2024 SF)
4. Baseball (5)	4. Euro 2024 final	4. Euro 2024 final
5. Table tennis (4)	5. Colombia vs Panama (Copa América 2024 QF)	5. Colombia vs Panama (Copa América 2024 QF)

Europe

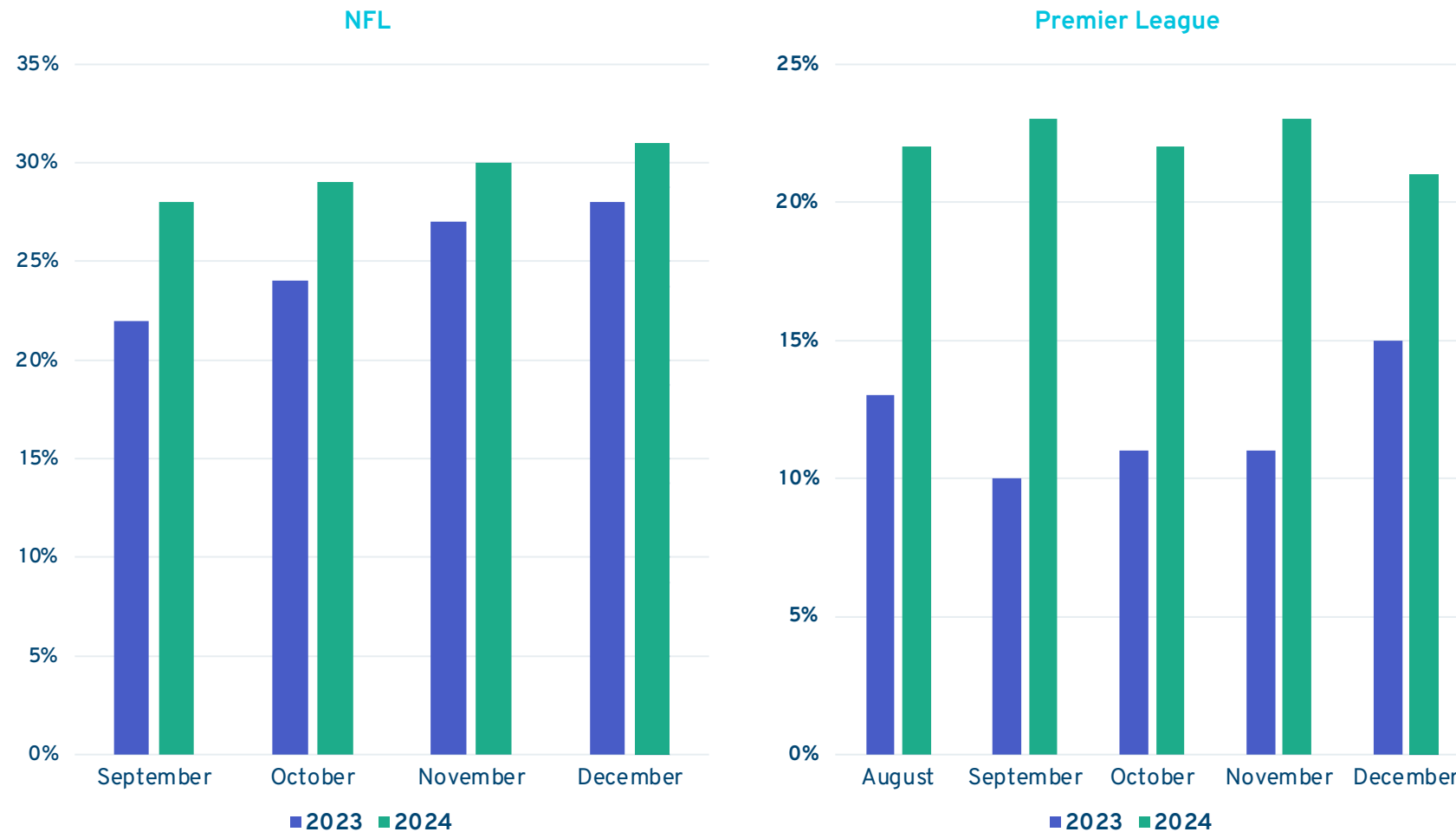
Most popular sports	Most popular events	Most popular events for first-time bettors
1. Soccer (1)	1. Euro 2024 final	1. Euro 2024 final
2. Horse racing (5)	2. Netherlands vs England (Euro 2024 SF)	2. Germany vs Scotland (Euro 2024 group stages)
3. Ice hockey (3)	3. Spain vs France (Euro 2024 SF)	3. Champions League final
4. Tennis (2)	4. Portugal vs France (Euro 2024 QF)	4. FA Community Shield
5. Basketball (4)	5. Spain vs Germany (Euro 2024 QF)	5. Serbia vs England (Euro 2024 group stages)

*by number of bets

Continued growth of Bet Builder

Bet Builder’s popularity among pre-match bettors continued to grow, albeit at a slower rate than previous years for certain major sports. Looking at data from Kambi’s global network, Bet Builder accounted for a significant percentage of pre-match turnover across many of the most popular leagues and sports, peaking during the playoffs for NBA and NFL.

% of pre-match bets which are Bet Builders

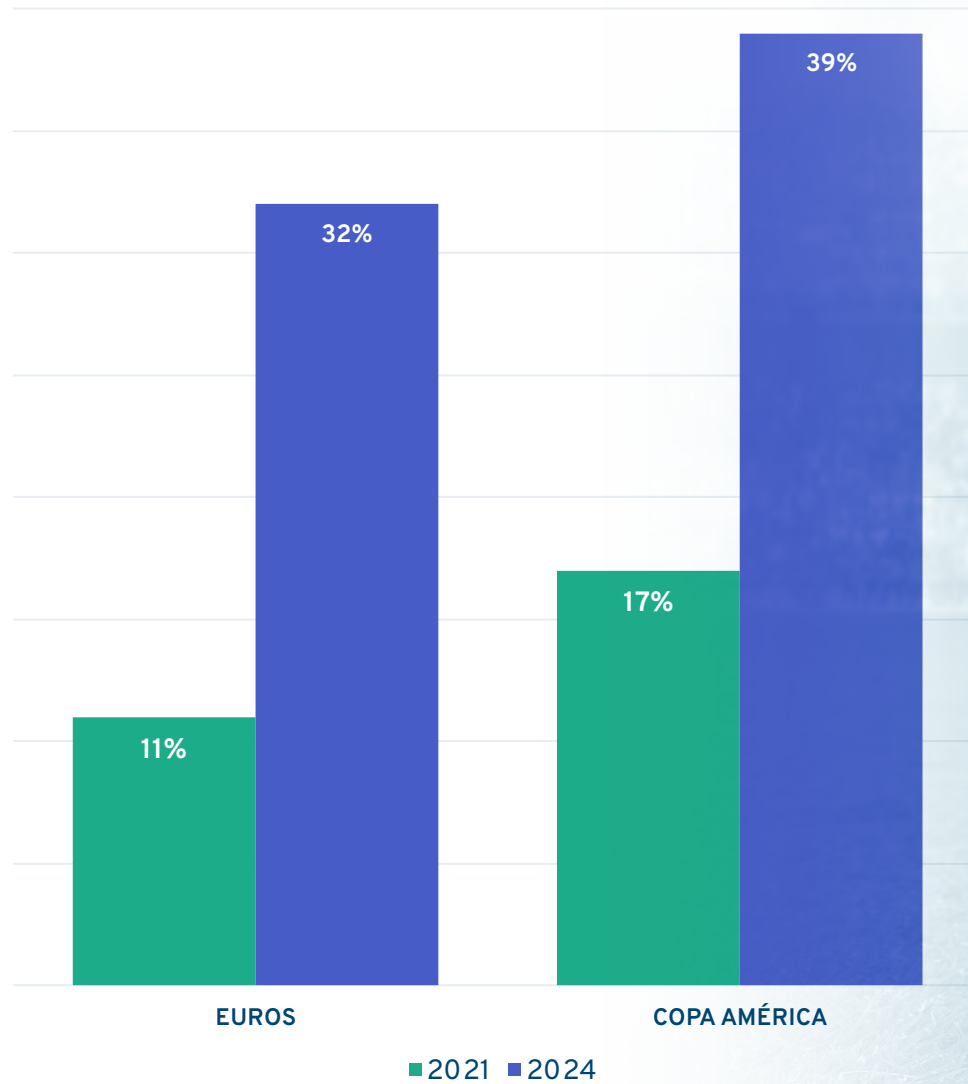


Kambi rolled out its expanded Bet Builder ahead of the Euros and Copa América, enabled by the transition of its AI trading to a new platform. This led to an expansion in popular player props markets as well as enhanced combinability, with the automation of this product enabling the same high level of quality for the following domestic soccer season.

Continued growth of Bet Builder

The rise of Bet Builder was on full display during Euro 2024 and Copa América 2024, which saw more than 17 million unique Bet Builder bets placed on the Kambi network during the tournaments.

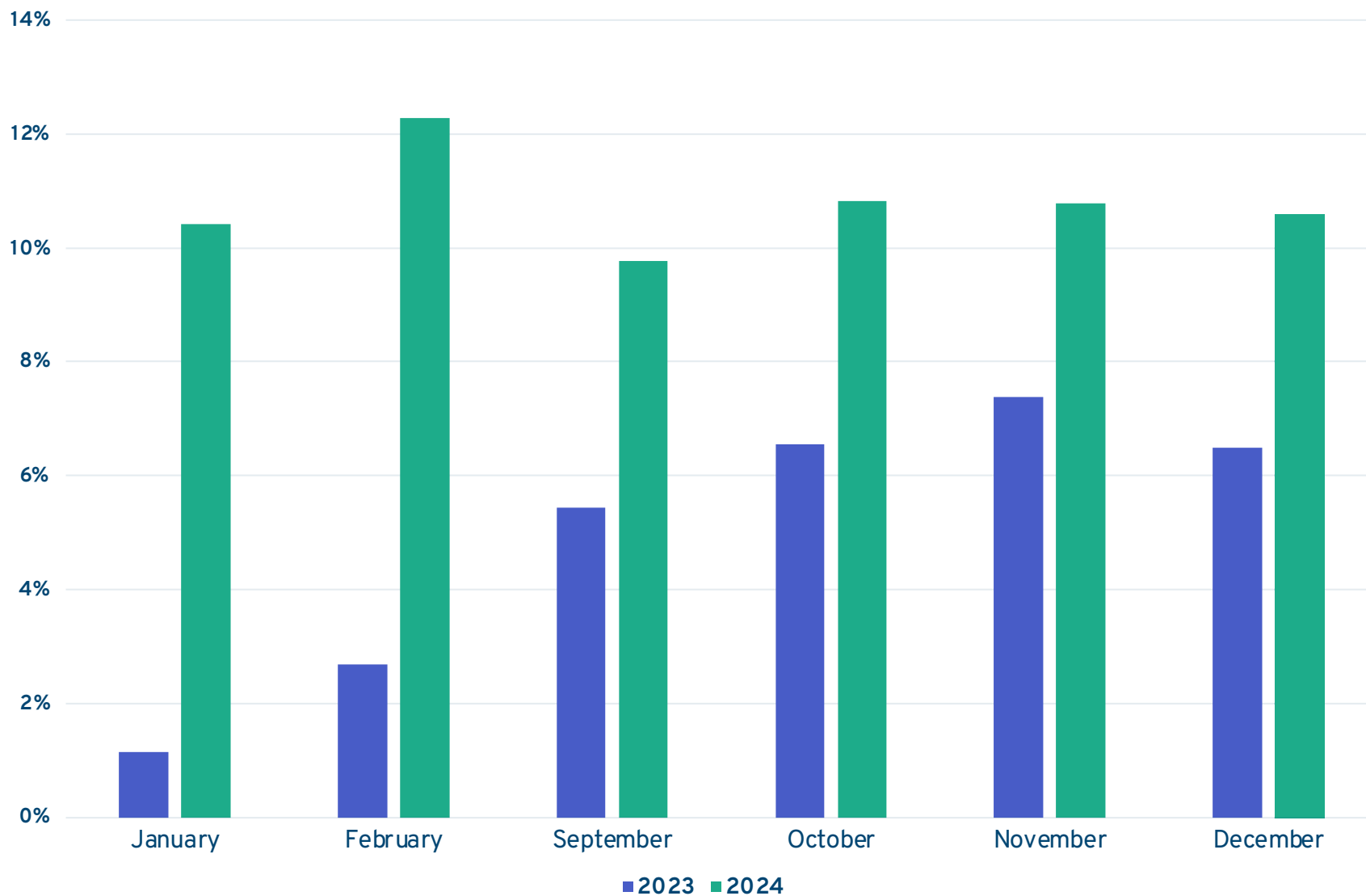
% of pre-match bets that were Bet Builders



Evolution of live betting

Live betting continues to evolve with the increase in demand for instant/micro markets, while live Bet Builder in particular is growing in popularity. In the NFL, for example, live Bet Builder was incredibly popular during the playoffs and more than doubled as a percentage of total live bets from 5% in 2023 to 11% in 2024.

Bet Builder as a % of live bets

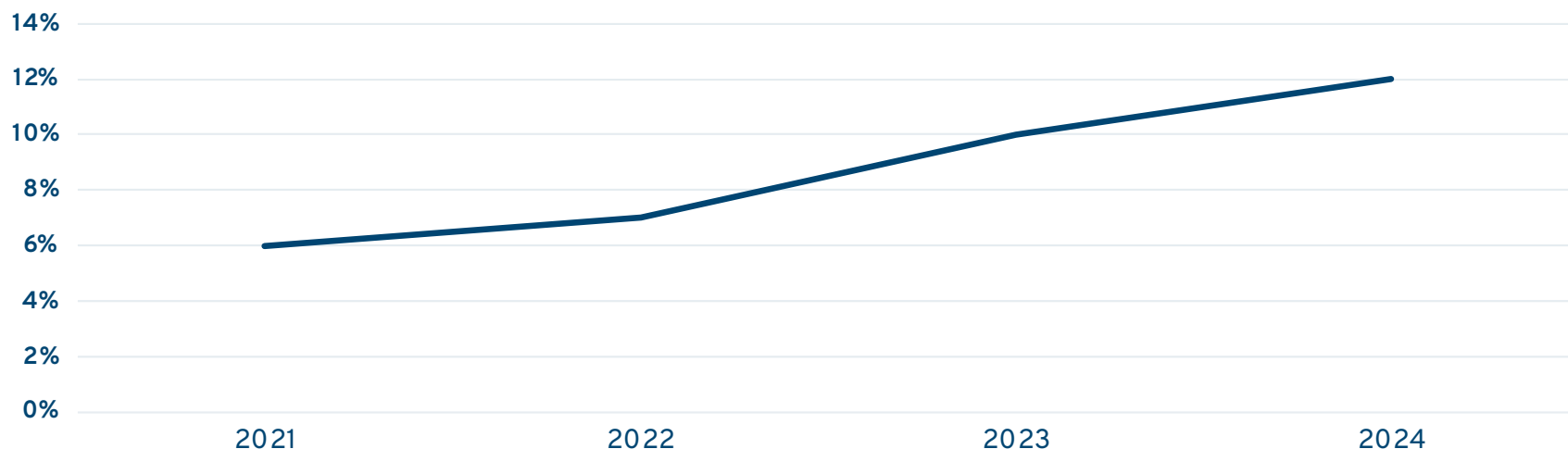


Popularity of players and stats-related markets

Kambi network data shows that bettors are increasingly gravitating towards player-based markets. In the 2024/25 Champions League, for example, 'Player's shots on target' is currently the most popular selection to add into a Bet Builder, while three of the top five most popular selections are player statistics markets.

1. Player's shots on target
2. Full time
3. Total goals
4. Player's shots
5. Player's fouls conceded

% of pre-match bets on player props for Champions League



The story is similar for US sports. In the 2024 NFL season so far, seven of the top 10 most popular markets in Bet Builder are player props:

1. Touchdown scorer
2. Spread
3. Total points
4. Total receiving yards by the player
5. Total rushing yards by the player
6. Total passing yards by the player
7. Moneyline
8. Total receptions by the player
9. Total touchdown passes thrown by the player
10. Total rushing & receiving yards by the player

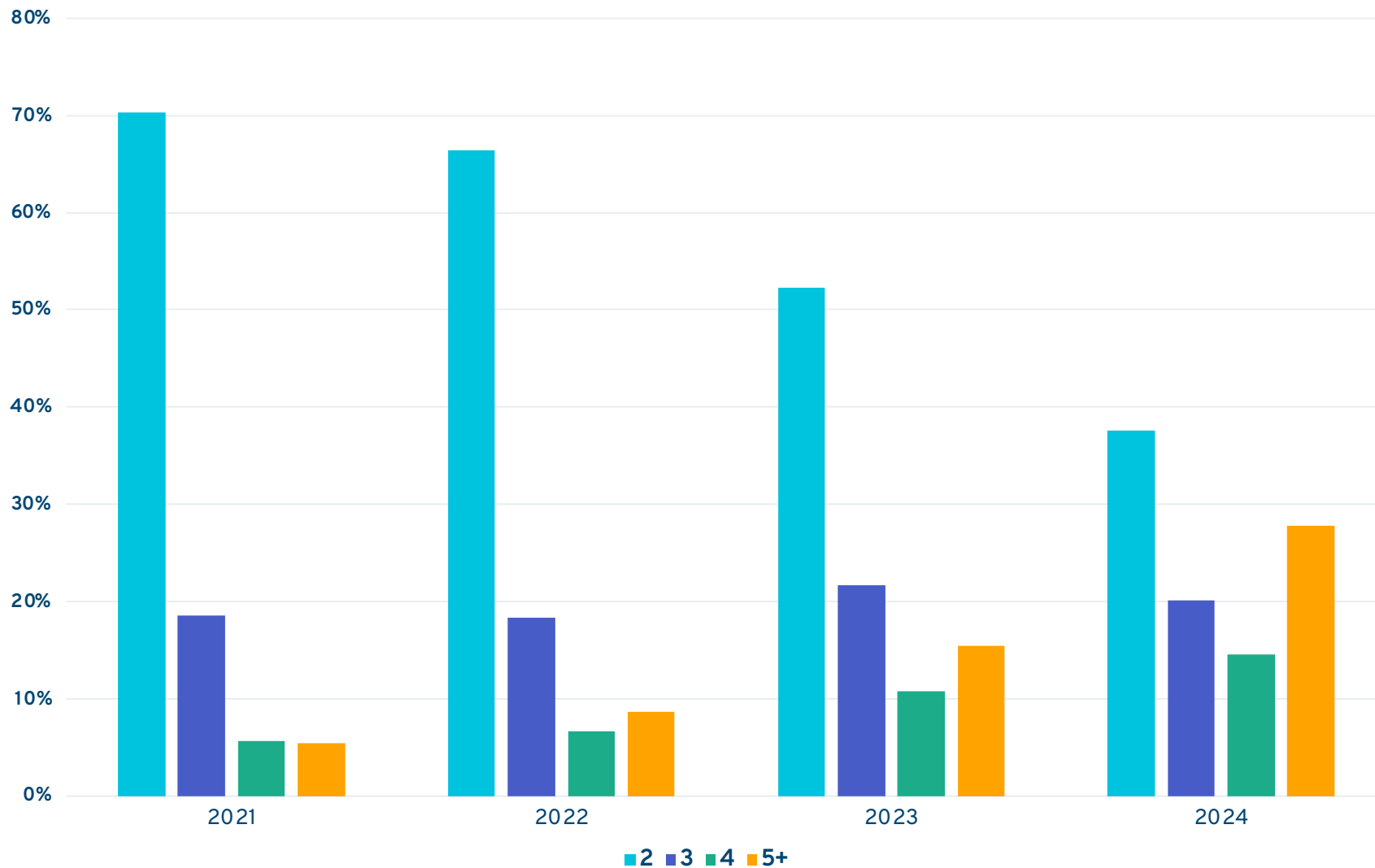
Growing Bet Builder selections



Expansion and complexity of the bet offering

Sportsbook content and offering scale are expanding, with players seeking greater control over their betting experience and a high level of combinability across different games, leagues and sports. In soccer, Kambi has seen a wider trends towards Bet Builder bets with more legs than in previous years as the size of the menu grows and the combinability of the offering increases.

% share by number of Bet Builder legs



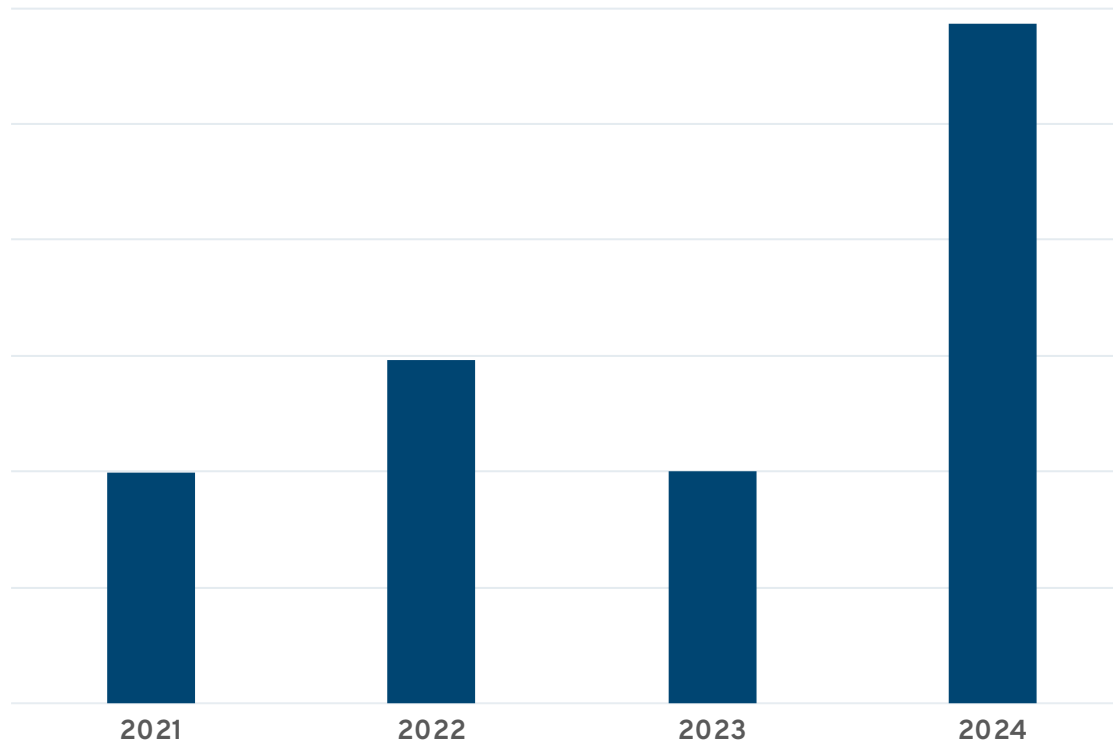
Esoccer and the importance of always-on content

Since revamping its esoccer offering in late 2023, Kambi has witnessed exponential growth from the vertical which is now among the top soccer leagues/events on the network – accounting for more bets than Spain's La Liga. The growth of esoccer – powered on the network by Kambi's Esports division Abios – highlights the importance of always-on content, giving players the opportunity to wager on the sport they love during breaks between soccer seasons and even in between the matches themselves.

Esoccer generated more bets than almost all traditional soccer leagues in 2024:



Number of esports bets (including esoccer + ebasketball)



The number of esports bets has almost tripled year-on-year from 2023 to 2024, with esoccer by far the fastest growing segment within the wider esports vertical

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