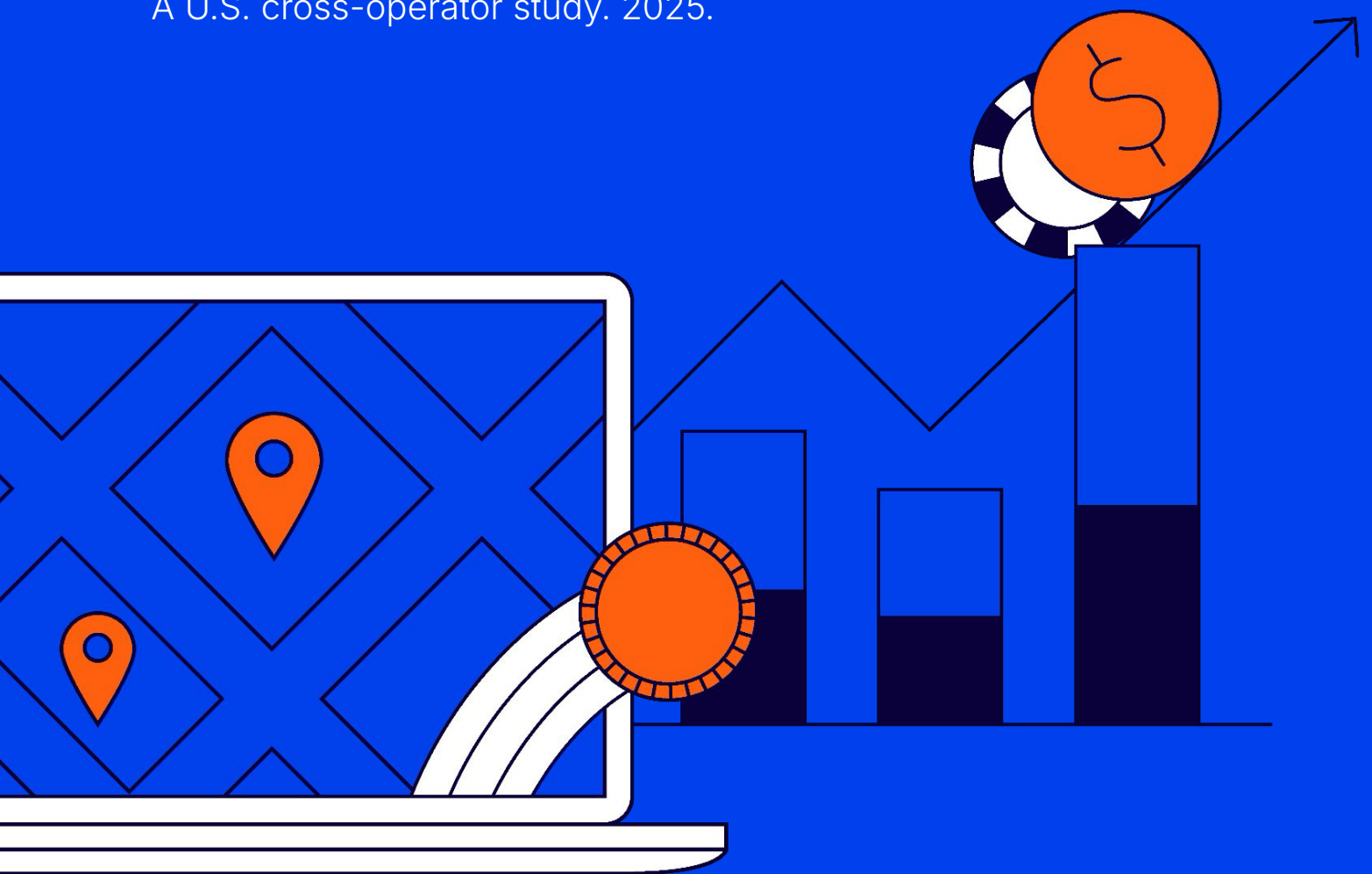




Small, but mighty:

The hidden value of desktop in iGaming

A U.S. cross-operator study. 2025.



Executive Summary

Desktop players are a small but disproportionately valuable segment. They are the most loyal, highest-LTV customers who drive multi-platform revenue.

In the U.S., desktop commands over 47% of iCasino revenue despite representing a fraction of total sessions. 2 in 5 desktop players play exclusively with a single operator. And over one-third of desktop-first users go on to adopt mobile, with half converting within the first day. These aren't casual players. They're your foundation.

With GeoComply, operators capture this value with minimal friction. In jurisdictions that require a desktop plugin for compliance-grade geolocation and device integrity checks, 7 in 10 new users arrive with GeoComply's plugin already installed through the wider network. No download, no prompt. They register and play. Pass rates reach up to 99.5%, and checks complete in under a second.

Desktop carries the highest fraud risk of any platform in iGaming. That's the industry reality. But operators on the GeoComply network see something different. Desktop fraudulent registrations have flatlined at 0.42%, a 10x improvement over the industry average. Mobile actually sees 2.9x more fraud attempts than desktop. The platform everyone assumes is dangerous is, for our operators, the cleanest environment they run.

The bottom line: desktop done right is a competitive advantage, and a foundation worth protecting.

The fallacy: Mobile is king in US iGaming

The fact: But desktop is queen

Desktop Facts

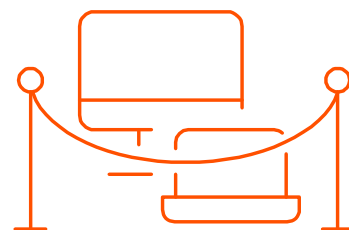
Where loyalty lives

2 in 5 desktop players play exclusively with their operator of choice.



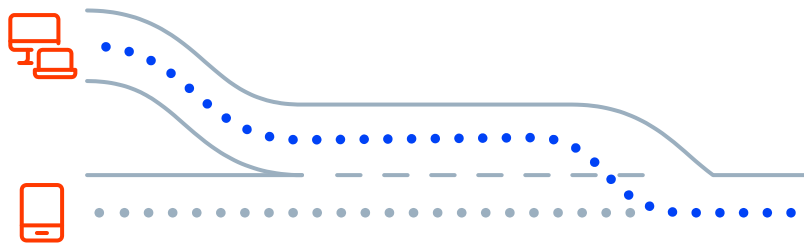
Where VIPs play

In the U.S., desktop commands 47% of iCasino revenue despite representing a fraction of total traffic¹. Across the GeoComply network, operators confirm the pattern: VIP concentration on desktop far exceeds mobile.



An on-ramp to higher LTV

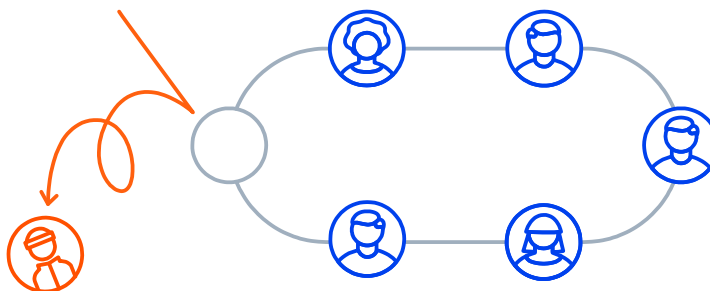
Over one third of desktop-first users go on to adopt the apps within days.



Clean ecosystem

Player-vs-player games demand trust. GeoComply's PLC/Desktop SDKs filters out more fraud, upholding game integrity.

GeoComply's Trading Insights API gives teams the ability to catch Sharp abuse.



Sources: GeoComply production data, (Jan - Dec 2025)

1. Grand View Research, "U.S. Online Casino Market Size, Share & Trends Analysis Report By Type, By Device, By Region, And Segment Forecasts, 2025-2030," 2024.

The fallacy: Downloading desktop plugins kill UX.

The fact: 2 million players already have GeoComply's desktop plugin installed. It just works—unless you're a fraudster.

THE RISK

For good players

Betting Hero confirms that User Experience is the #1 driver of operator preference, ranking significantly higher than Promotions. Yet, Betting Hero also cites industry friction costs operators up to 26% of signups.²

THE REALITY

Effient CPA

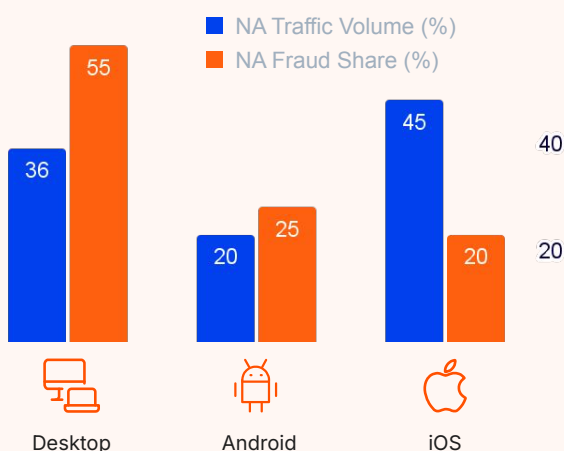
You bypass the "geolocation download wall" for 7 out of 10 new users. Zero-friction thanks to GeoComply's network effect.

Brand new users convert at high rates

Market-best performance (up to 99.5% pass, <0.85s checks) with best of breed, intuitive troubleshooting. Time to first best is still fast.

For bad actors

North America: Traffic Volume vs. Fraud Share by OS¹



Automation, anti-detect browsers, and multi-accounting are easier to execute at scale on desktop. Globally, desktop is the highest-risk platform for iGaming fraud, with nearly 1 in 5 account creations being attacks (LexisNexis).³

Desktop May Be Toxic. Yours Isn't.

So, while legitimate users get frictionless access, bad actors get stopped at the door. Everywhere else, desktop is a liability. Here, it's protected by our built-in anti-fraud suite.

10x | lower fraud rate on new accounts vs. the industry average

The only desktop tech that instantly filters out the advanced tools used for fraud, proxy betting and collusion. Risks that drain margin and poker liquidity.

Sources: GeoComply production data, (Jan - Dec 2025)

1. Synthesized industry benchmarks from TransUnion ("Omnichannel Fraud", 2024), LexisNexis ("True Cost of Fraud", 2024), and FTC consumer data (2025).
2. Betting Hero Research, New York Market Study (2022)
3. LexisNexis Risk Solutions, "Gaming & Gambling Fraud Trends & Attack Patterns" / Cybercrime Report 2022

The "already-installed" advantage

The hidden acquisition efficiency behind your desktop conversion rates.

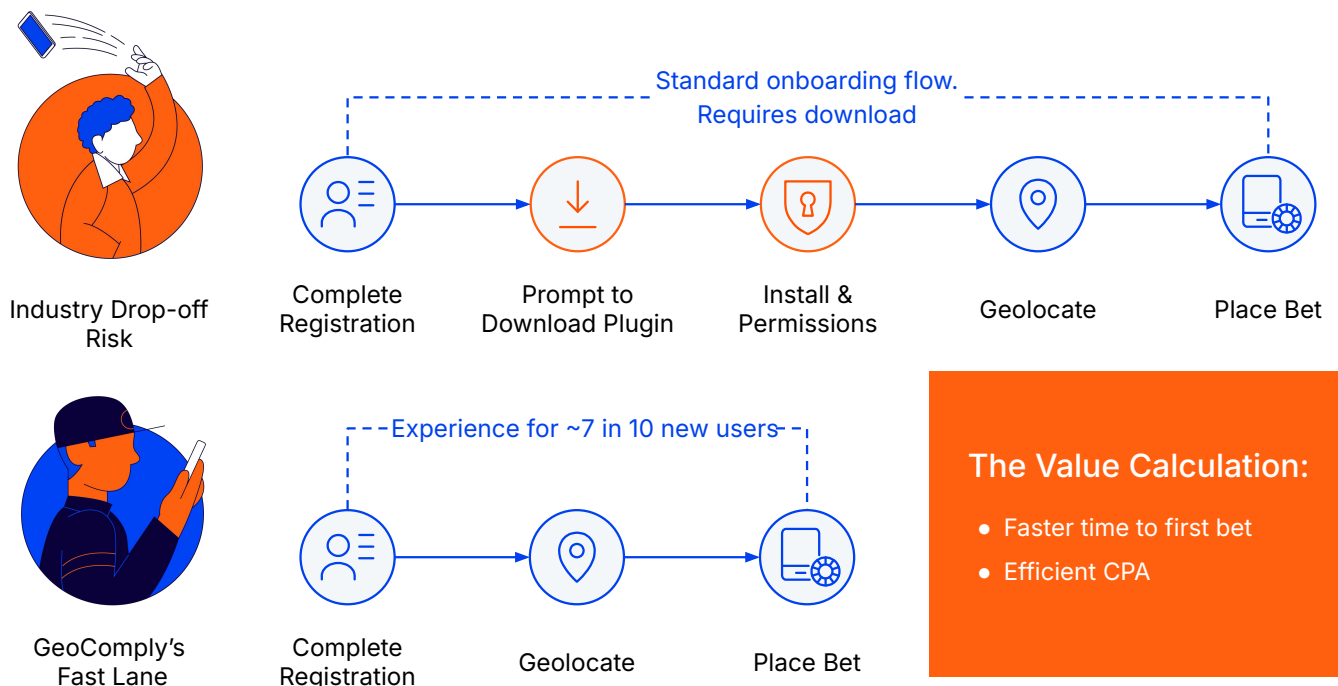
70% of new desktop users arrive with PLC installed.
No download. No friction. Register and play.¹

Why? GeoComply operators benefit from the industry's largest network. Their acquisition funnel is effectively 'pre-paved' by the wider ecosystem.

Skip the download

For native desktop apps, GeoComply is the only provider that doesn't require additional downloads thanks to our Desktop SDK.

Experience comparison



Sources:

1. GeoComply production data, (Jan - Dec 2025)
2. Betting Hero Research, New York Market Study (March 2022)

Desktop feeds your mobile funnel

Desktop isn't a silo. It's a high-velocity path to omnichannel growth.

34% | of your desktop-first players adopt mobile¹

The payoff?

3.4x | Multi-platform players are 3.4x more engaged vs. mobile-only players²

The desktop to mobile on-ramp

1. Frictionless Entry

You drive demand; we clear the path. By bypassing the download for **7 in 10** new users, we minimize drop off and accelerate "Time to First Bet."

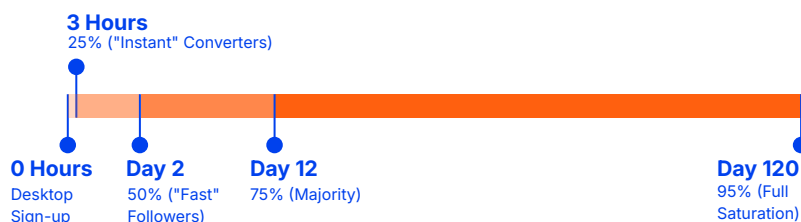
2. Established Trust

Players verify and deposit on the stability of desktop. After experiencing the thrill of your games, moving to mobile is a safe choice.

→ up to 99.5% pass-rate on with our Desktop SDK

3. Speed to Mobile Adoption

The multi-platform transition is fast. When you nail desktop on Day 1, you're likely to win win the quarter.



A largely one-way street

Only 2% of users move Mobile → Desktop. Proving web is a critical entrypt to win wallet share.

Sources: GeoComply production data, (Jan - Dec 2025)

1. Desktop data combines PLC and GDK unique users against iOS and Android.
2. Engagement measured by the volume of pre-wager geolocation checks.

Retaining your fans & VIPs

Desktop stability is an invisible loyalty program protecting your high-value players.

38% | of your desktop players are "Exclusive Players"¹

Why they matter?

Desktop-primary players skew toward iCasino and Poker—high-margin verticals. It's concentrated, defensible revenue.

Current optimized state



Speed

0.85s* latency keeps players in flow.



Reliability

99.999% uptime, **99.2%** pass on PLC



Poker Leads

99.54% pass rate on Poker apps, with Desktop SDK

The competitive advantage

Avoids the common pitfalls peers see with alternative vendors.

- "Re-Download": 100% of your users stay active. Alternatives force a restart.
- High CPU Load: Run light (up to 6%). Alternatives are resource-heavy (30%), disrupting game performance.*
- Privacy Pushback: No need to ask players for "Full Disk Access" and Browser Permissions at every log in. Alternatives do.*
- The "Poker Gap": Rely on a battle tested Poker SDK. Most alternatives don't have the option.

Sources: GeoComply production data (Jul - Dec 2025)

1. Exclusive players mean unique users that only play with a single operator, and no other operator in the GeoComply network, based on active geolocation traffic.
2. Figure represents the Average P50 (Median) round-trip latency, measured from API call to response receipt across the global client network.

* Betting Hero, UX Benchmarking Study (2025). Independent research commissioned by GeoComply.

A filter for maximum acceptance, [minimum risk]

Desktop done right: frictionless for VIPs, hostile to fraud.
That's what a decade of tuning delivers.

0.42%

Of new desktop
users are fraudulent¹



For a comparison

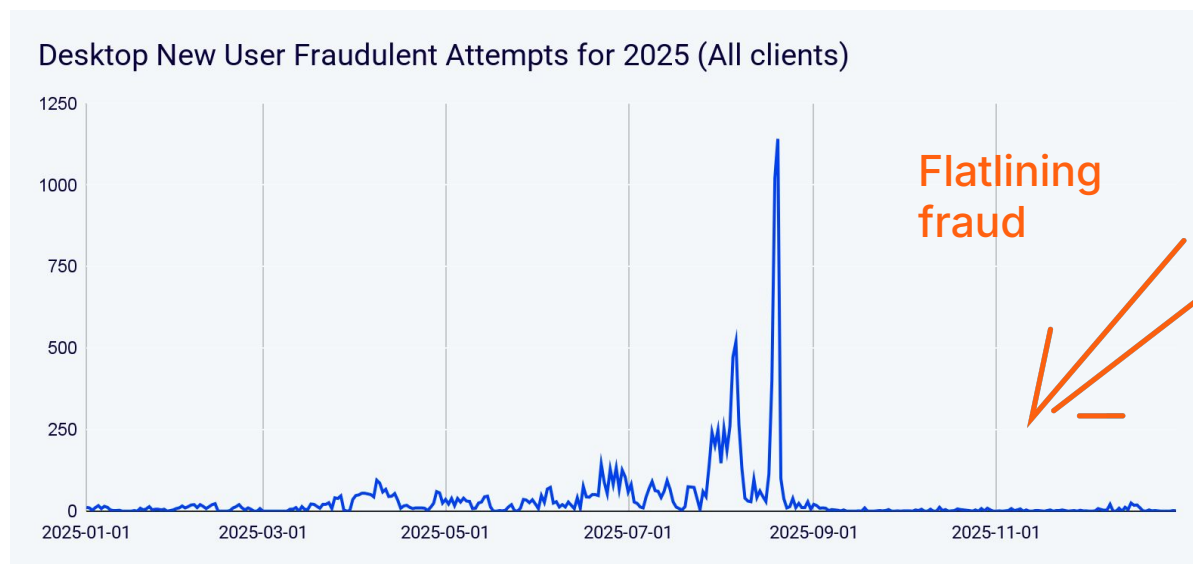
Mobile sees approximately **2.9x more**
fraud attempts than Desktop²

PLC pays out a “fraud deterrence” dividend

Cross industry, desktop’s larger screens, browser flexibility, and automation capabilities make it the platform of choice for bonus abuse, multi-accounting, and running scripts at scale. U.S. iGaming new account fraud attempts have peaked at 4.2%.³

Our desktop fraudulent registrations have flatlined at 0.4%—a 10x efficiency.

The barrier to entry is now high enough that sophisticated fraudsters forgo it for easier targets.



Sources: GeoComply production data, (Jan - Dec 2025)

1. Fraudulent defined as malicious device, location, user behaviour detected by our engine and Risk team.
2. GeoComply reports a mobile fraud rate of 1.2% of new user fraudulent attempts.
3. TransUnion, Top Fraud Trends: Digital Identity Risk Accelerates Fraud Losses (2025 Update)

Integrity players can feel

Ten years of frictionless integrity for operators where trust is everything.

Building a Trusted Brand

Players will accept a bad beat, but never a rigged game. Layer in our intelligence to ensure your liquidity pool stays healthy.

Let Real Skill Shine

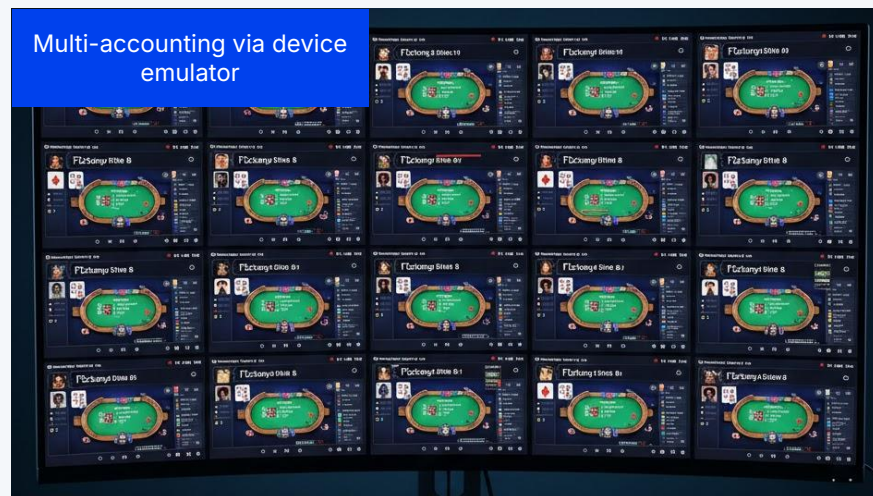
Validate that every decision is human. Catch custom **Poker Bots**, Real-Time Assistance (RTA), and **GTO Solvers** at the process level.

Promote Fair Play

Neutralize unfair advantages. Identify active tools for remote coordination as well as physical player proximity to prevent "team play".

Balance Tables

Protect the recreational economy. Prevent predatory multi-accounting by anchoring users to device IDs and location histories.



Activate Today

- **No New Cost.** Fully included in your current license.
- **Shared Immunity.** Blocks threats verified across our network.
- **Peer Standard.** Aligns defenses with market best-practices.

Spot the Sharps

Put the intelligence you already have in your trading team's hands.
Then watch them do their thing.

Take action without impacting your VIPs

Use high-precision geolocation, advanced device fingerprinting, and intelligent link analysis to spot suspicious behaviour that points to sharp activity. From there, ball's in your court.

Unmask beards and VIP account takeover

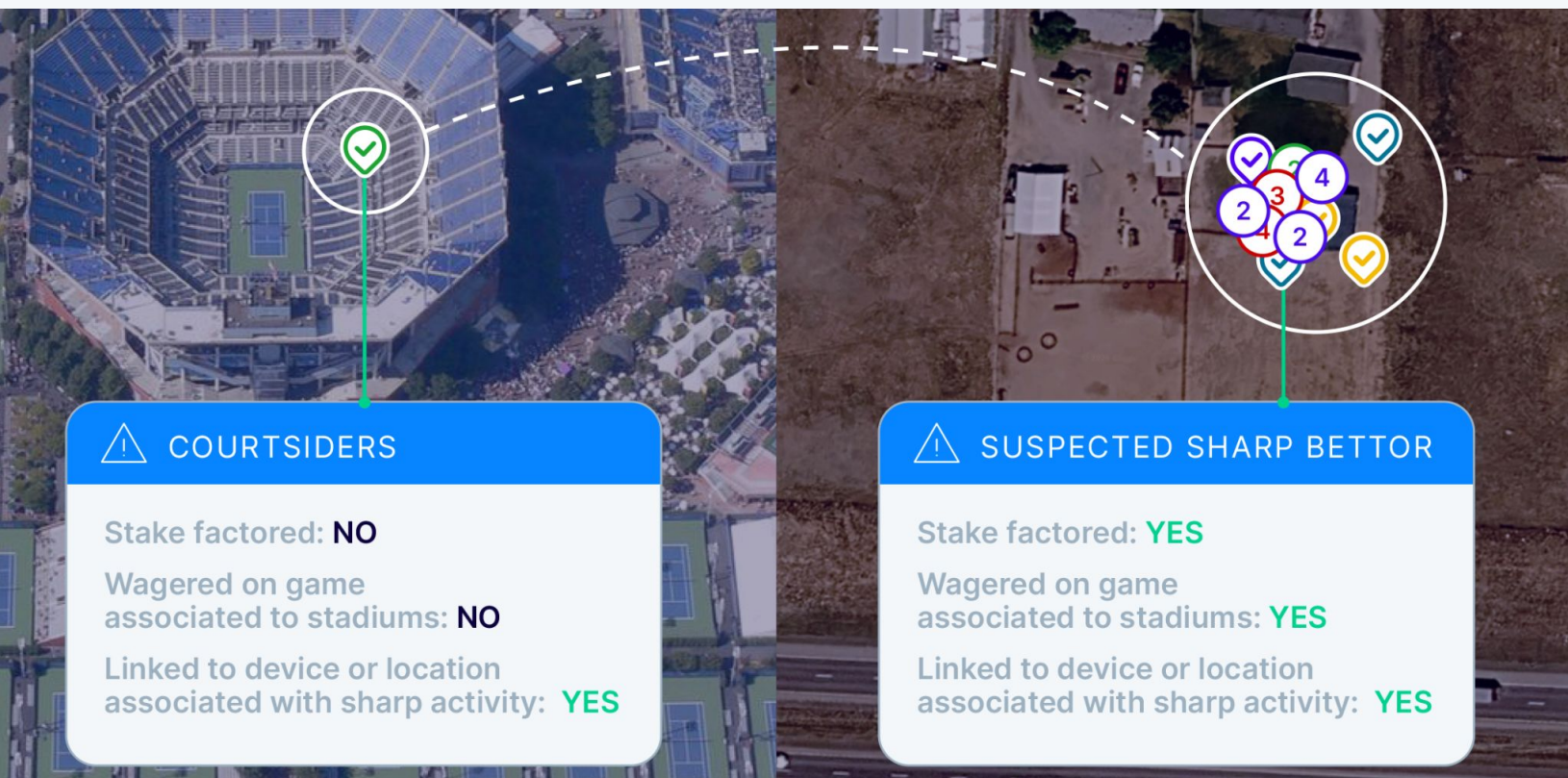
Raise a flag when a VIP or established account is suddenly active on a new device at a new location.

Detect proxy courtsiding

See the hidden connections between someone on their phone at the game and linked accounts that share location, device, and behavioural patterns.

Pinpoint multi-accounting

Get instant alerts when new accounts are created on known devices at coordinated locations and compare activity with previously stake-factored profiles.



Activate Today

- Turn a multi-million dollar liability into a non-event.
- Act on compromised accounts in seconds, not hours.
- Operate with confidence in fair odds for all.



Thank you.

Where do you stand?

This report reflects patterns across iGaming's largest network.
Your desktop story has its own numbers. We'd love to show you.

Request your desktop report

Included insights, yours anytime:

**Solo Player
Analysis**

Know which desktop users are exclusively loyal to you.

**Conversion
Optimization**

Refine your UX with insights from Betting Hero and solutions from GeoComply.

**Pre-Install
Base**

See exactly how many new signups benefit from existing PLC installations.

**Retention
Analysis**

Benchmark acquisition and retention across the industry.

Insights are exclusive to GeoComply partners and derived from aggregated, anonymized network data.