



OCTOBER 9, 2026

Inside Philippine Online Gaming: Supply, Traffic & Competitive Intelligence

What operator catalogues, estimated website visits and revenue simulations reveal about the market.

33.6M

modeled monthly visits — top operator,
Sep 2026

15,048

distinct game titles observed across the
panel

+138

titles added by one operator in a single
day

RESEARCH SCOPE

Two independent lenses, one market

ENDA combines daily observation of public game lobbies with modeled website-traffic estimates — kept separate, labeled honestly, and joined only where defensible.

23

Operators monitored daily

15,048

Distinct titles observed

184

Providers identified

15

Operators with reliable modeled-traffic grades

122.7M

Combined modeled visits, Sep 2026 (eligible ops)

4½ mo

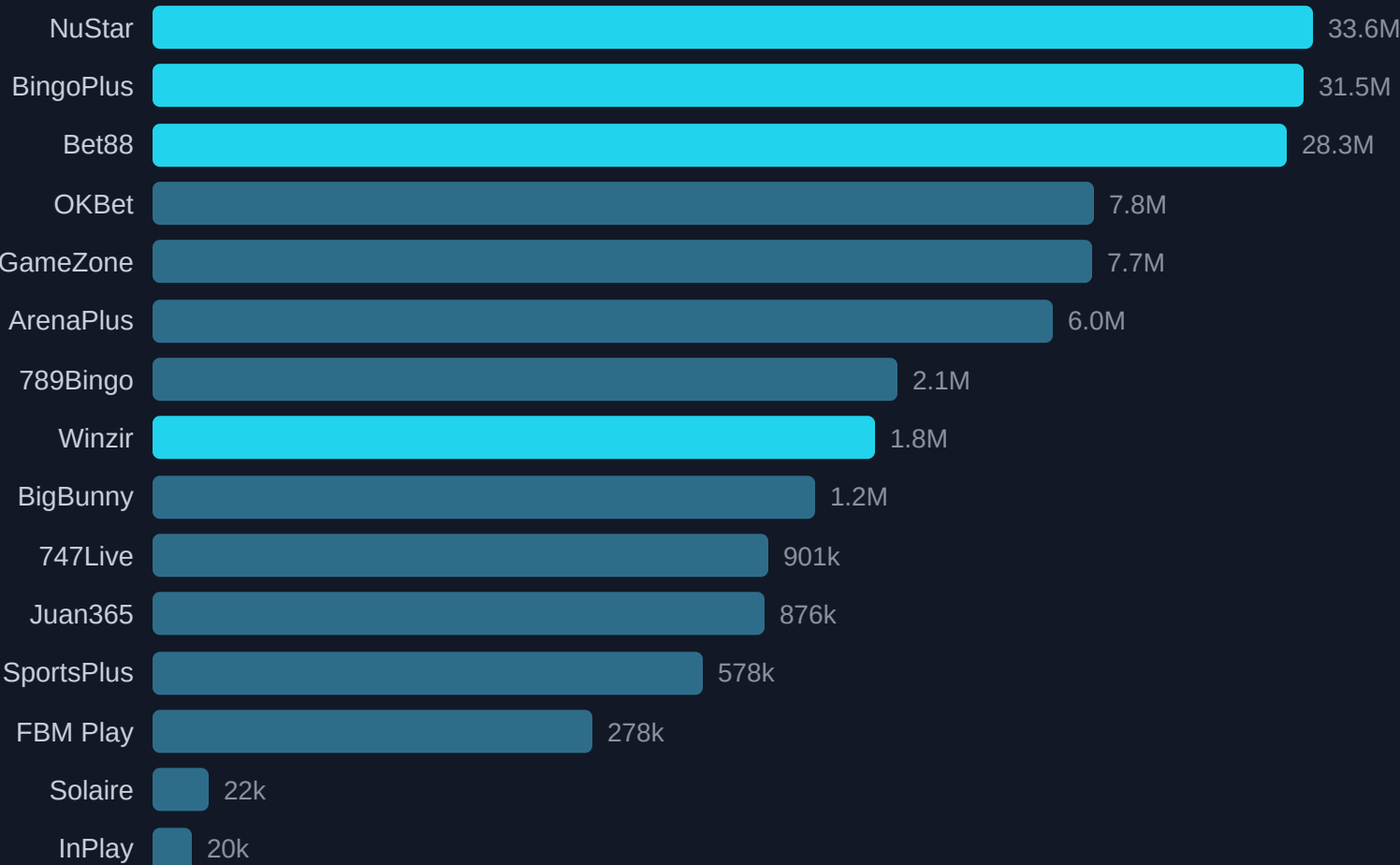
Daily catalogue history since 28 May

Traffic figures are modeled estimates — not measured visitors, customers or revenue. Panel ≠ the entire market. Observations through 8 Oct 2026.

TRAFFIC INTELLIGENCE

Three operators hold the audience tier

Modeled monthly visits — Sep 2026 (log scale)



Source: ENDA Traffic Intelligence (TabAPI modeled estimates)

NuStar, BingoPlus and Bet88 each draw an estimated **28–34M modeled visits/month** — a clear top tier. The next group (OKBet, GameZone, ArenaPlus) sits around 6–8M; the tail falls off steeply.

Modeled estimates (TabAPI), Sep 2026, canonical domains. CasinoPlus excluded — its estimate is unresolved. Modeled visits ≠ unique visitors, customers or market share.

TRAFFIC GEOGRAPHY

Most modeled traffic is attributed to the Philippines — but one operator stands out

Estimated Philippine vs foreign share — Sep 2026



789Bingo is the outlier: ~18% of modeled visits appear US-based (PH 77%), vs ≤8% foreign everywhere else — worth watching, not yet a conclusion.

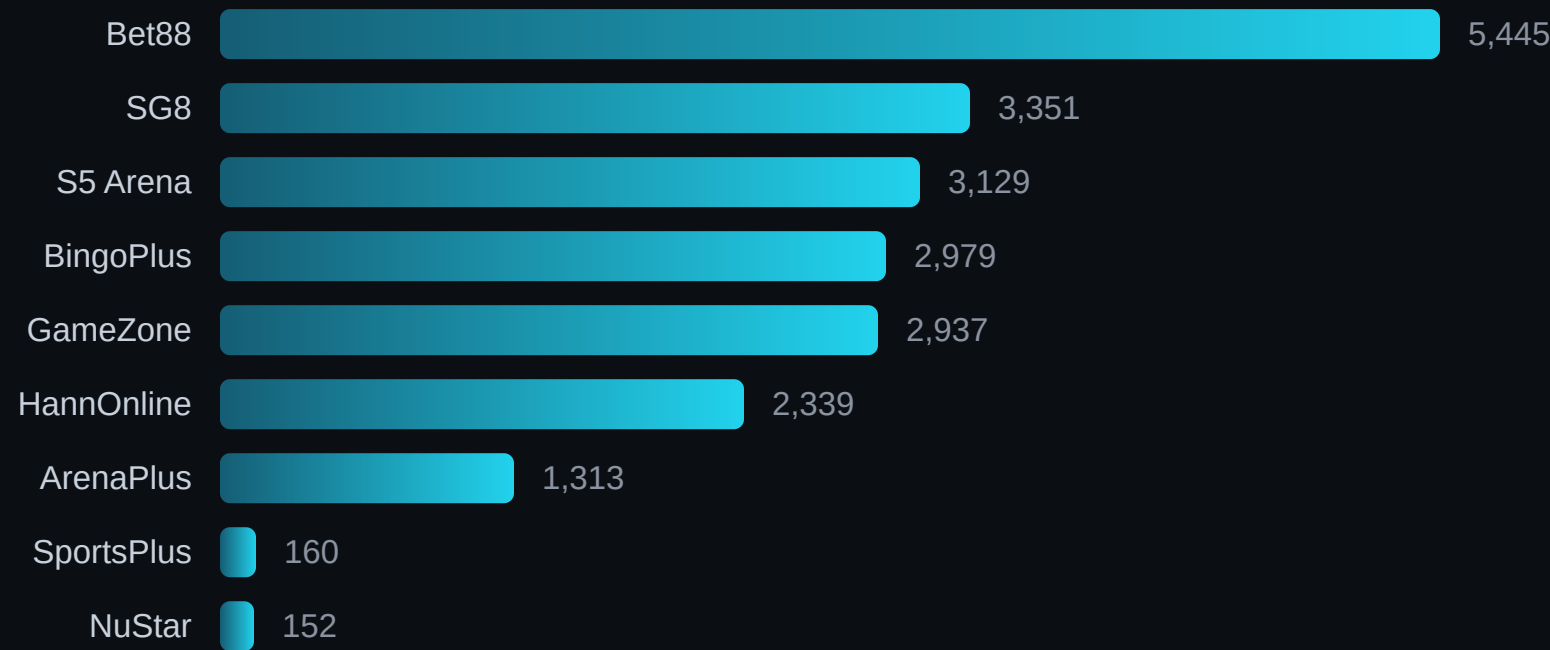
Apparent geography ≠ physical location or legality

Reliable-grade operators show **92–99% Philippine-attributed share**. 789Bingo breaks the pattern: ~18% of its modeled visits are attributed to the US. Country attribution is modeled — it does not establish a visitor's physical location, nationality or regulatory status — but as a persistent anomaly it's worth monitoring.

Country shares are modeled estimates subject to attribution error. US share for 789Bingo is consistent across months; flagged CAUTION.

COMPETITIVE SUPPLY

A 36× spread in catalogue size



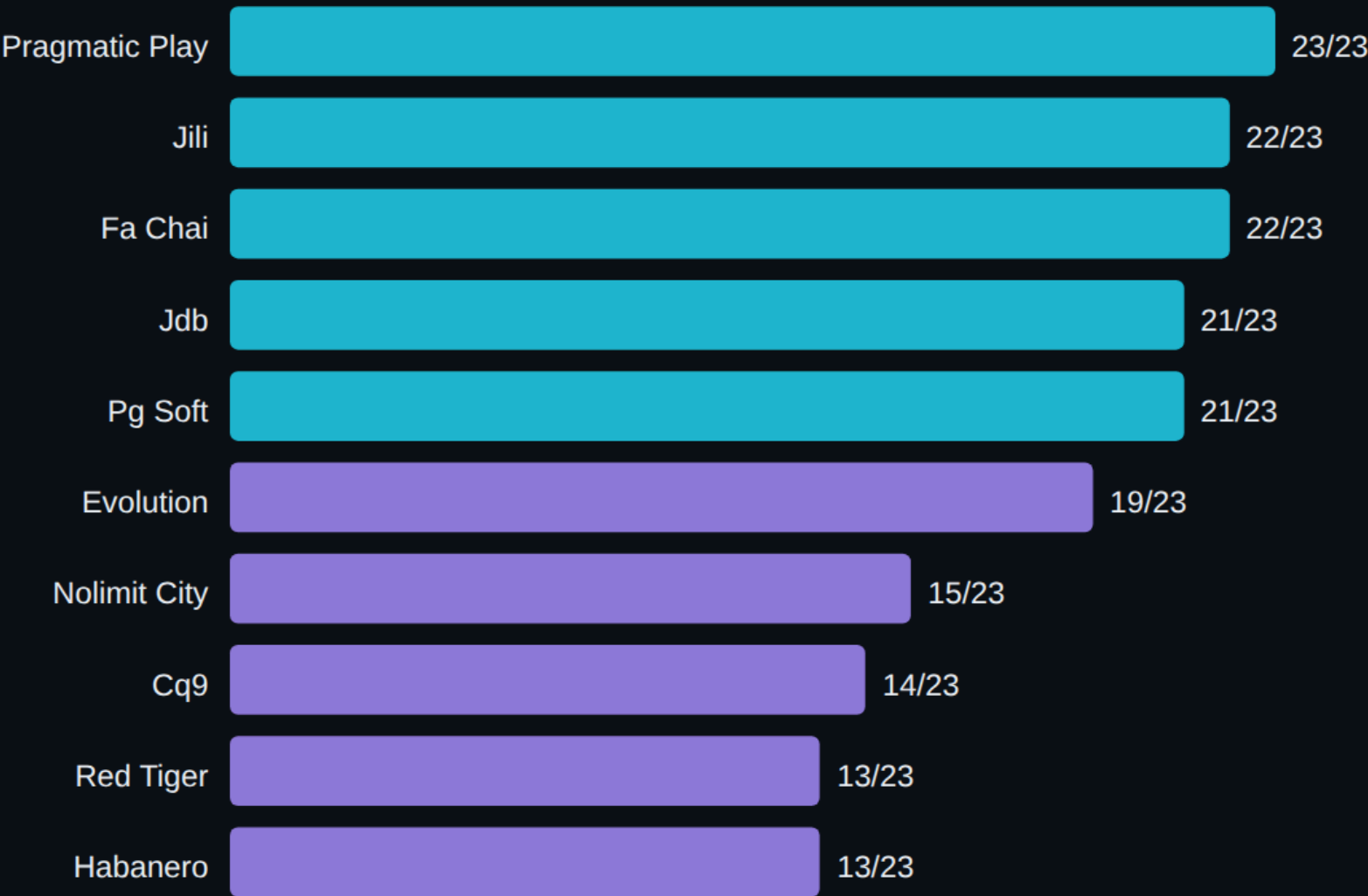
Eight operators sit between 1,000–3,400 titles — breadth is the mid-tier's visible signal. NuStar's 152 is curated, live-casino-led — not thin supply.

PROVIDER DISTRIBUTION

One provider is on every operator — but reach ≠ scale

Provider distribution — operators carrying each provider

Share of 23 monitored operators with observed listings



Pragmatic Play is carried by **all 23** monitored operators. Evolution reaches only 19 — yet holds 843 observed titles: **deep, not wide** — the signature of a live-casino portfolio.

Reach = operators carrying ≥1 observed title — not market share or revenue. ENDA, 8 Oct 2026.

CASE STUDY · HANNONLINE

What +138 titles in one day actually looks like

On **7 October**, HannOnline added 138 titles in a single day — the largest one-day expansion we've observed. The composition tells the real story:



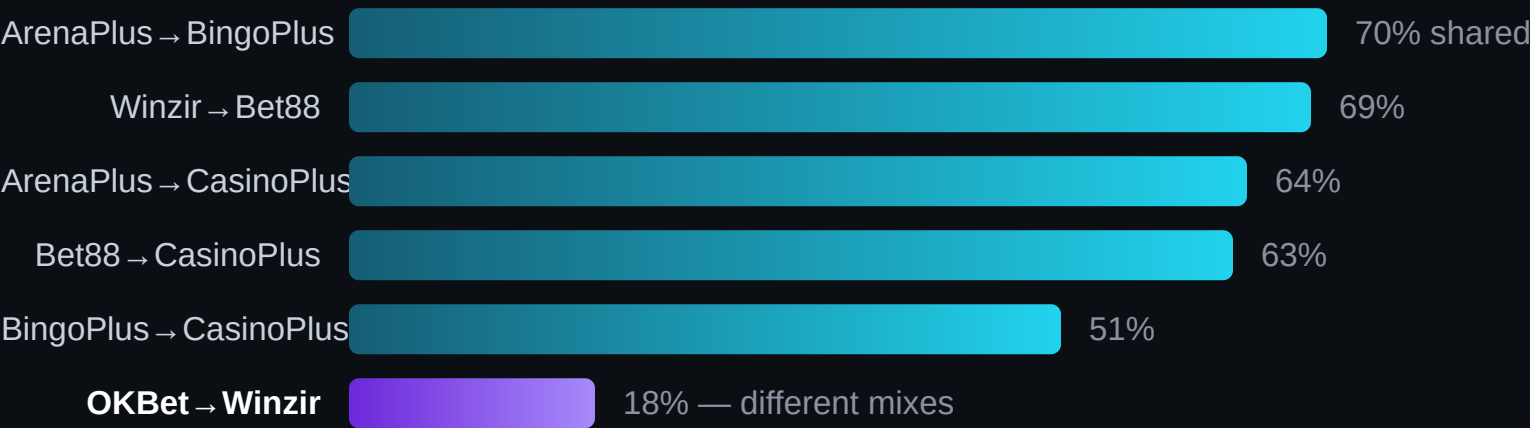
Two-thirds came from Pragmatic Play and Evolution, and **124 of the 138 titles already existed at rivals** — a bulk provider integration, not new launches. Hann Online relaunched in Feb 2026 on PhilWeb infrastructure; nine months on, it's still visibly scaling.

Sources: ENDA daily lobby observations; insiderph.com & SiGMA on the PhilWeb–Hann relaunch (Feb 2026).

CATALOGUE OVERLAP

Rivals share a common spine — and differentiate in the tail

Even the most similar pair — **BingoPlus × CasinoPlus** — shares just 775 of a combined 2,582 titles (**0.30 overlap**). Measured as containment — how much of the *smaller* catalogue appears at the bigger rival:



Jaccard = shared ÷ combined. Containment = shared ÷ smaller catalogue. Six fully-crawled operators; observed catalogues are floors. Normalised title matching.

SUPPLY × DEMAND

More games don't necessarily mean more traffic

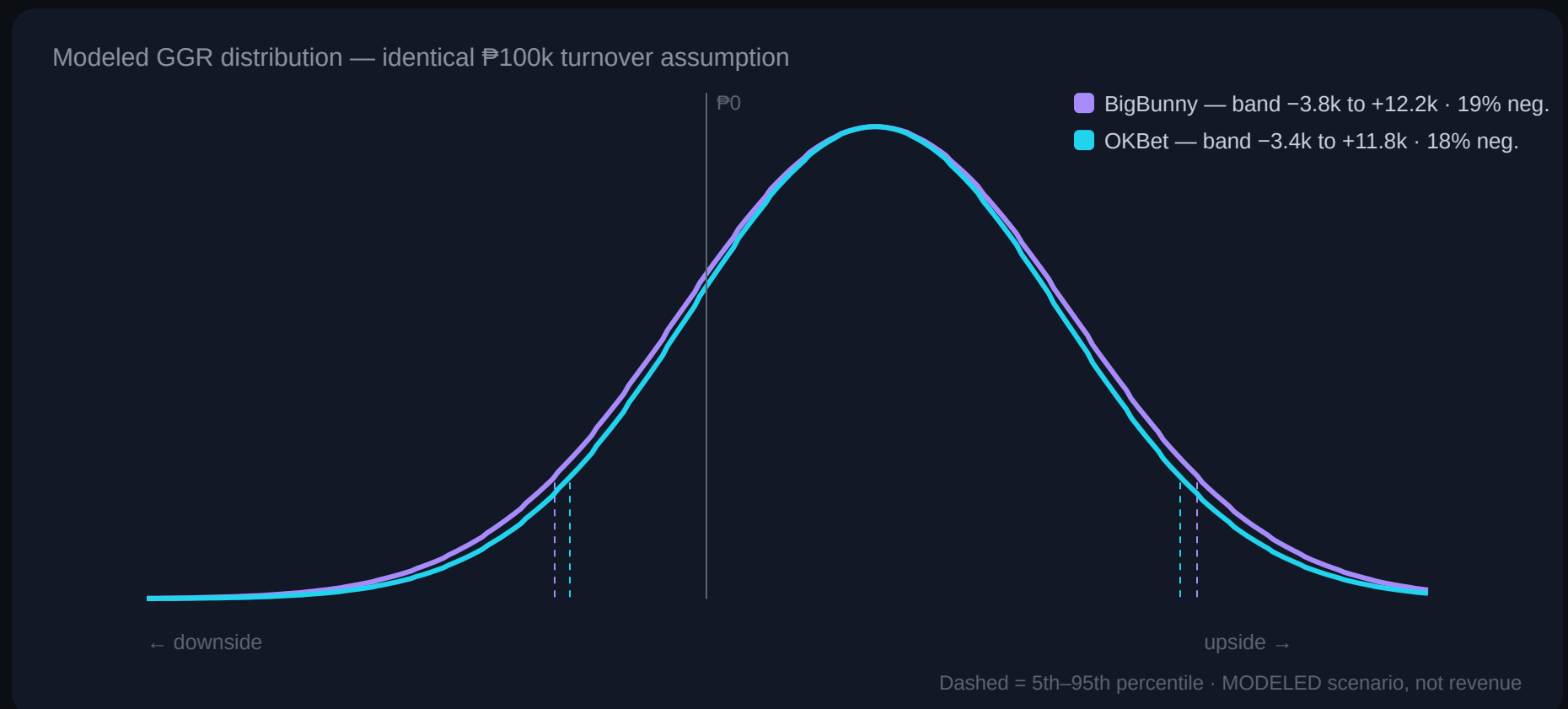


An observed contrast: NuStar shows **33.6M modeled visits alongside a 152-title captured catalogue**, while Bet88's 5,445-title catalogue sits at 28.3M. The two measures don't move together in this panel — what drives the difference is a question for further research.

Observed contrast between modeled traffic and captured catalogue breadth — no causal claim. Catalogues undercount live-casino-heavy lobbies. Sep 2026 visits × 8 Oct catalogues.

ENDA SIMULATOR B · PORTFOLIO RISK

Same turnover, different downside — the volatility mix decides



Identical configured scenario through two real catalogues: **₱100k turnover**, attribute-calibrated payout models. Near-identical mean GGR — but BigBunny's modeled downside reaches -₱3.8k vs OKBet's -₱3.4k at the 5th percentile. The actual portfolio's volatility mix moves the tails, not the average.

Modelled scenario — measured catalogue + reference RTP, configured turnover, parametric payout models. Not reported operator revenue or profitability.

WHAT IT MEANS

Four takeaways

Three operators hold the audience.

A ~30M-visit top tier (NuStar, BingoPlus, Bet88) is separated from the rest by a 4× gap — and catalogue size isn't what separates them.

Headline providers are table stakes.

Differentiation lives in the mid-tail — Nolimit City (15 ops), CQ9 (14), Red Tiger and Habanero (13) — and in weekly additions.

Catalogue moves are early signals.

HannOnline's single-day +138 shows a provider integration landing in real time — observable before any announcement.

Small catalogues overlap; big ones differentiate.

Compact catalogues are ~ $\frac{2}{3}$ shared spine; distinctiveness lives in the tails — where exclusivity still has commercial value.

Interpretations of observed and modeled data — not forecasts of revenue or player behaviour.

METHODOLOGY & LIMITATIONS

Catalogues.

Daily public-lobby observation of 23 operators since 28 May 2026. Observed listings — not release dates; panel $\neq$ whole market.

Traffic.

Modeled monthly visits per canonical domain (Sep 2026). Estimates — not measured visitors, customers or share. CasinoPlus excluded (unresolved); INVESTIGATE-grade figures shown only with flags.

Similarity.

Jaccard + containment over six fully-crawled operators; normalised title matching; observed catalogues are floors.

Simulation.

Measured inputs (catalogue, RTP, mix) vs configured assumptions vs parametric payout models — separated, labeled, never conflated.

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