

trafficology

AFFILIATE FOCUS BY GAMBLING INSIDER

AUGUST 2020

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AFFILIATES

FIGHT FOR SURVIVAL

Examining current SEO techniques to help affiliates win the Google search war





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TRAFFIC REPORT

Trafficology has partnered with data experts Casino City Press to provide insight into website and traffic trends across the gaming industry. The below is a breakdown of the top 20 affiliate programmes by market for June 2020, including: overall across all devices (desktop and mobile), sports betting across devices, casino (mobile) and casino (desktop)



OVERALL

Rank	Name	Website
1	bet365 Affiliates	www.bet365affiliates.com
2	IQ Option Affiliate	affiliate.iqoption.com
3	NetHive Affiliate Program	www.nethive.com
4	eToro Partners	www.etoropartners.com
5	Betfair Partnerships	affiliates.betfair.com
6	U-affiliates	www.uffiliates.com
7	Kindred Affiliates	www.kindredaffiliates.com
8	GVC Affiliates	www.gvcaffiliates.com
9	betway Partners Africa	www.betwaypartnersafrica.com
10	William Hill Affiliates	affiliates.williamhill.com
11	Gamesys Group Partners	www.gamesysgrouppartners.com
12	Stoiximan.gr Affiliates	affiliates.betano.com
13	IG Markets Partners	www.ig.com/uk/marketing-partnership
14	FDJ Affiliate Program	www.fdj.fr
15	Betway Partners	www.betwaypartners.com
16	ComeOn Connect	www.comeonconnect.com
17	Rabbit Affiliates	www.rabbit-affiliates.com
18	XM Partners	partners.xm.com
19	1xBet Partners	1xpartners.com
20	Tipsport Partners	www.tipsport.cz/partner

CASINO (MOBILE)

Rank	No. of sites	Name	Website
1	13	Gamesys Group Partners	www.gamesysgrouppartners.com
2	1	WinBet Affiliates	winbetaffiliates.bg
3	3	Rabbit Affiliates	www.rabbit-affiliates.com
4	15	ComeOn Connect	www.comeonconnect.com
5	8	PlayAmo Partners	playamopartners.com
6	2	StarVegas Affiliates	www.starvegasaffiliate.com
7	16	U-affiliates	www.uffiliates.com
8	2	Platin Casino Affiliates	partners.platincasino.com
9	3	bet365 Affiliates	www.bet365affiliates.com
10	5	William Hill Affiliates	affiliates.williamhill.com
11	15	Buffalo Partners	www.buffalopartners.com
12	5	LeoVegas Affiliate	www.leovegasaffiliates.com
13	12	Genesis Affiliates	genesisaaffiliates.com
14	4	Videoslots Affiliate	partner.videoslots.com
15	18	Kindred Affiliates	www.kindredaffiliates.com
16	10	GVC Affiliates	www.gvcaffiliates.com
17	1	Wildz Affiliates	wildzaffiliates.com
18	15	Betsson Group Affiliates	www.betssongroupaffiliates.com
19	2	Rank Affiliates	www.rankaffiliates.com
20	2	Almor Affiliates	almoraffiliates.omarsys.com



Rankings are estimated using statistical data and should not be considered absolute ranking values. More than 50 complementary top lists are available on the iGamingDirectory.com website operated by Casino City Press

CASINO (DESKTOP)

Rank	Name	Website
1	Gamesys Group Partners	www.gamesysgrouppartners.com
2	WinBet Affiliates	winbetaffiliates.bg
3	Betsson Group Affiliates	www.betssongroupaffiliates.com
4	GVC Affiliates	www.gvcaffiliates.com
5	Rabbit Affiliates	www.rabbit-affiliates.com
6	LeoVegas Affiliate	www.lovegasaffiliates.com
7	Stakes Affiliates	affiliates.stakes.com
8	Videoslots Affiliate Program	partner.videoslots.com
9	Wildz Affiliates	wildzaffiliates.com
10	U-affiliates	www.uffiliates.com
11	Kindred Affiliates	www.kindredaffiliates.com
12	Platin Casino Affiliates	partners.platincasino.com
13	Best Partners	www.bestpartners.com
14	bet365 Affiliates	www.bet365affiliates.com
15	Mr Affiliate	www.mraffiliate.com
16	PlayAmo Partners	playamopartners.com
17	Buffalo Partners	www.buffalopartners.com
18	Casumo Affiliates	www.casumoaffiliates.com
19	William Hill Affiliates	affiliates.williamhill.com
20	Genesis Affiliates	genesisaffiliates.com

SPORTS BETTING

Rank	Name	Website
1	bet365 Affiliates	www.bet365affiliates.com
2	NetHive Affiliate Program	www.nethive.com
3	Betfair Partnerships	affiliates.betfair.com
4	betway Partners Africa	www.betwaypartnersafrica.com
5	Kindred Affiliates	www.kindredaffiliates.com
6	U-affiliates	www.uffiliates.com
7	Tipsport Partners	www.tipsport.cz/partner
8	GVC Affiliates	www.gvcaffiliates.com
9	Stoiximan.gr Affiliates	affiliates.betano.com
10	Betway Partners	www.betwaypartners.com
11	William Hill Affiliates	affiliates.williamhill.com
12	AfiliadosW	afiliadosw.co
13	ZEturf Affiliates	affiliationen.zeturf.com
14	1xBet Partners	1xpartners.com
15	Ladbrokes Partners	www.ladbrokescoralpartners.com
16	Tipico Affiliate Program	www.tipico-affiliates.com
17	Marathon Bet Affiliate	affiliates.marathonbet.com
18	Paddy Partners	www.paddypartners.com
19	Bet9ja Affiliates	affiliates.bet9ja.com
20	PM Affiliates	pmaffiliates.com/en/



Rankings are estimated using statistical data and should not be considered absolute ranking values. More than 50 complementary top lists are available on the iGamingDirectory.com website operated by Casino City Press

SEARCHING FOR SUCCESS

Speaking at iGB Live, digital marketer **Neil Patel** reveals the best SEO techniques to help affiliates come out on top in the Google search war



In the competitive world of affiliate marketing, the need and goal to rank higher than your competitors has never been greater.

Operators and affiliates continue to battle to come out on top in keyword searches, attempting to stand out in a crowded marketplace.

That battle hasn't stopped amid the backdrop of the coronavirus pandemic. Back in May at AffiliateCon Virtually Live, Gennadiy Vorobyov, Netpeak Bulgaria CEO, spoke about SEO search pattern trends during the pandemic. His research found searches had decreased, but impressions and clicks increased, as major live sport was suspended between mid-March and mid-May. However, that just increased the competition to stand out for other niche offerings, such as esports and virtual sports with an added importance on online casino.

But with all the technology available to affiliates these days, it's crucial to take advantage of a number of platforms, as well as coming out on top in Google searches. And unsurprisingly, there are a number of ways to do this to stay one step ahead of your rivals, especially during the apparent Google bungee jumping game, where affiliates seem to rank inconsistently.

Being consistent is key and Neil Patel is a man whose day job is to focus on winning the SEO war. The co-founder of digital market agency Neil Patel Digital has previously worked with brands such as Microsoft, Amazon, IBM and Airbnb, and has experience ranking at the top for online casino and poker searches.

During his how to win the 'Google Wars' talk at iGB Live in July, Patel's initial advice is simple: "To be successful, it's all the little things that add up. If you do the little things that give you a 1, 2 or 3% edge on your competition, that's the key to success.

"With Google algorithms, updates happen so frequently. What most people don't know is a few years ago Google stated that more than 3,200 algorithm updates happen per year, which is a crazy amount.

"What we found is you can't always control if you're going to do well or poorly during an update. We saw that Google makes its updates because they want to put users first.

"If users enjoy using Google, they'll keep going back, so Google makes money. If Google puts sites at the top that people hate, then they're not going to use Google as much, and it makes less money."

So what are some of the techniques that can help affiliates to rank higher more consistently? For one, focusing on updating rather than writing new content is a technique that Patel believes will give affiliates the edge over its competitors.

"Everyone is writing so much content on a daily basis, which means Google now has its prime pickings of which content to rank number one, two and three," Patel says.

"Updating your traffic is important. On my site, I only write one new blog post per week. But I have three people updating at least one blog post a day, roughly 90 a month. My team is updating

“THE BIGGEST TRAFFIC GAINS IN RECENT YEARS HAVE COME FROM TRANSLATIONS. IF YOU GO WITH THE ROUTE OF TRANSLATING YOUR CONTENT, TRANSCRIBING IT TO THE LOCAL REGIONS, IT OPENS UP A TON OF OPPORTUNITIES. YOU MIGHT NOT MAKE THE SAME IN AFFILIATE COMMISSIONS FROM SOME OF THESE OTHER REGIONS, BUT BECAUSE THERE’S NO COMPETITION, YOU’LL RANK HIGHER AND YOU’LL GOBBLE UP THE MAJORITY OF THE TRAFFIC”

loads of content a month, and even if they’re not new posts, your Google traffic over time can continue to rise by doing this.”

When it comes to updating the content, Patel believes it’s crucial to look at who else is ranking for that keyword you’re aiming for, then going through the top 10 pages.

He adds: “I really ask myself, how is my content compared to theirs and what are they doing that I’m not?”

Updating those elements and also the timestamp to bring it back to prominence is next on the agenda, but Patel is adamant that it’s not always about the word count. Sometimes reducing the word count to make the content more relevant, to get people their answer quicker, is more important.

Further explaining his content strategy, Patel says: “If you have 80 to 100 blog posts, this strategy works really well, as opposed to 10 or 20. I would still spend 70 or 80% of your time writing new content, but the moment you hit 500 blog posts, you probably want to split your time 50-50 with updating and writing new posts.

“If one casino has some news and I know I can get a quick bit of traffic but no one’s going to end up converting it for affiliate revenue, I wouldn’t really care to write about it.

“I’m looking for more of the longtail phrases. Everyone wants to rank for those head terms but they don’t necessarily make the most money. Searching for something like credit cards could have endless possibilities, which means the conversion rate is much lower.”

While slow and steady wins the race with Google, it’s a different story with YouTube. The video-sharing platform is the second-most popular search engine, and as Patel mentions, the first 24 hours of publishing a video is key to gaining traction.

Patel says: “If you publish a video within the first 24 hours and it does well, YouTube is highly likely to rank you really high

with almost any terms on that day or within a week. The key with YouTube is to share it on social media and blast and promote your videos within the first 24 hours; and by doing that, you’re much more likely to get the results.”

While updating and promoting content is vital, it’s arguably not quite as important as the need to make that content available for multiple audiences to view. With billions of blog posts already on the internet, having the ability to translate content to other languages and specific regions is how Patel has grown his traffic over the years. A survey from his company looking at what helped over 200 large corporations grow the most found translation was the biggest difference.

Patel explains: “What Google lacks is content for all the other languages other than English. Do you really need more content? No, but when you translate to other languages and regions, you don’t have as much competition and you can actually get quite a bit of traffic really fast.

“The biggest traffic gains in recent years have come from translations. If you go with the route of translating your content, transcribing it to the local regions, it opens up a ton of opportunities. You might not make the same in affiliate commissions from some of these other regions, but because there’s no competition, you’ll rank higher and you’ll gobble up the majority of the traffic.”

Another way to adapt to Google updating its algorithms is, of course, page speed. In a world where we want everything now, it can’t be understated how detrimental having a slower page speed than your competitors can be, especially with mobile search the preferred method. As Patel points out: “Every second delayed in load time costs Amazon around \$1.6bn. That’s a lot of money and shows what people think about slow-loading sites.

“People want really fast-loading sites and using a CDN [content delivery network] to host your whole site from it, not just static pages or images, will help with speed. I have my whole site as much as possible loading from CloudPlayer; it’s allowed me to have an amazing score on Google PageSpeed and it’s really helped me increase my traffic.”

On the ranking war, Patel concludes that having an amazing user experience is key. That means fast site speed, fewer pop ups, and more things that put the user first and provide value for them, such as free tools, which can make users more loyal to your brand.

With technology forever evolving, Patel believes the future of SEO lies with the omni-channel approach. Google isn’t the only place people search; there’s also YouTube and the next big search method: voice search.

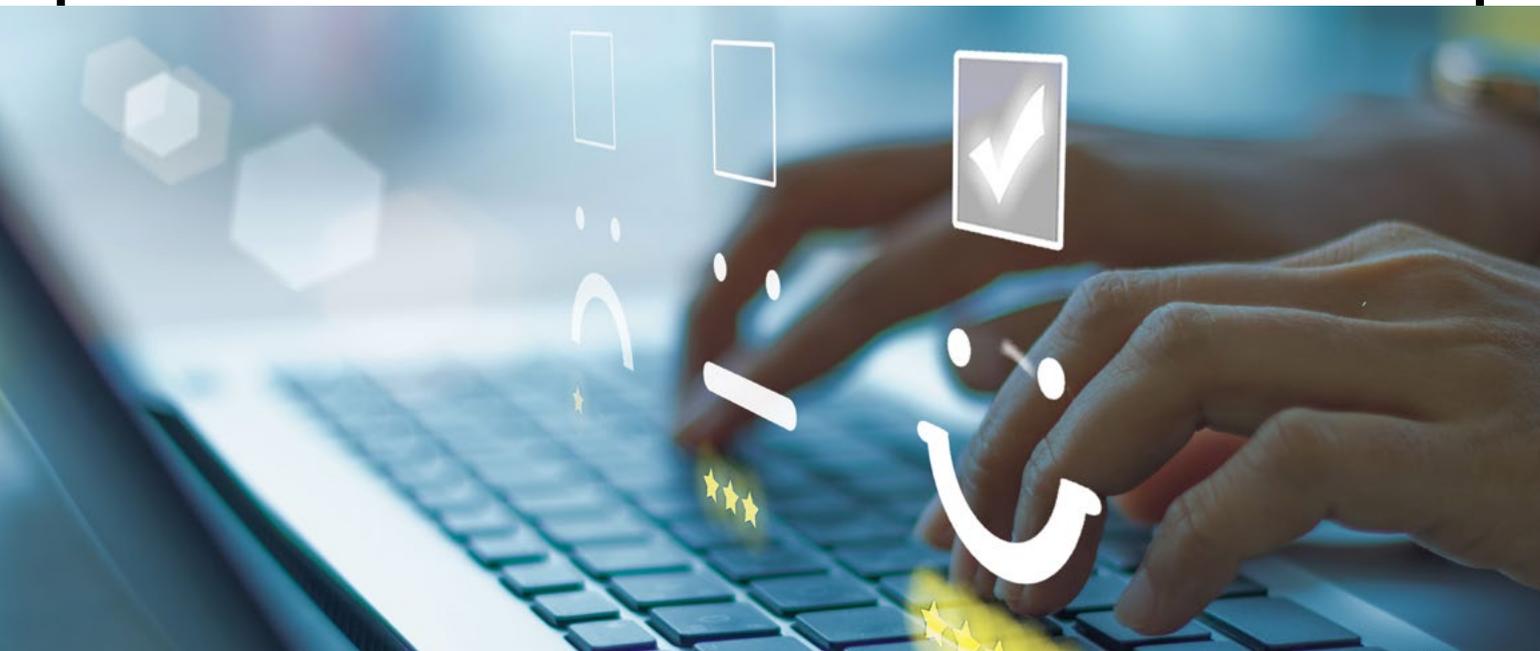
Patel explains: “At least in the US, more than 50% of the searches this year are voice searches. That’s a big number because everyone is searching from their phone when they’re on the go, with people finding it easier to search for things like the weather.

“That means search is everywhere and voice search platforms are pulling from organic Google results. If you can rank your site higher, you’ll start pulling there.”

The way consumers search for the latest trends and key words in the gambling industry will also adapt to mainstream changes. Affiliates need to be aware of the evolving landscape and that there are multiple search methods to consider when it comes to winning the ranking war.

ARE UX EXPERIENCED?

Eddie Jordan, creative director at ActiveWin, explains best practice when it comes to user experience



We know affiliate marketing is continuously evolving. In line with new marketing developments, webmasters must ensure their sportsbook and casino websites are also up to scratch with UX best practice principles.

Imagine the frustration of readers who see a relevant result on a SERP, only to end up on a website that is difficult to navigate.

The result, generally, is that people will bounce if it isn't easy to find what they're looking for right away.

This hurts a site in two ways: readers are disappointed and will probably not visit again, and Google views high bounce rates as an indicator of lack of relevance to the search query (and future rankings will suffer).

In fact, UX is so important to Google it has pre-announced that a site's UX experience will be a significant ranking consideration beginning in 2021.

Here are our tips on the basics of User Experience (UX), how to monitor it and how to make changes.

WHAT IS UX?

UX refers not only to how your website is designed but how easy it is to navigate. Without a positive user experience, your ranking will suffer no matter how beautiful the site is.

The primary requirement for outstanding UX is to meet the exact needs of visitors without any barriers.

Therefore, it's best to avoid the temptation to pummel readers with loads of information you want them to see but does not match their query.

The broader perspective of UX comprises design, layout, brand, site maps, interaction and interface.

There are measurable factors which can be improved through UX.

TRAFFIC LOYALTY

If a user has a problematic online experience, it's highly unlikely they will return. Not only have you missed out on a conversion, but they may also be more inclined to go to a competitor with a better website.

The design is not merely about looking good for site visitors, but the more profound effects of UX prove that it needs to stand out among the competition to maintain a solid standing in the market.

Equally, having all the bells and whistles is one thing, but succeeding in the entire customer experience is the ultimate goal.

While customer experience and user experience are different threads of the broader customer satisfaction bubble, the UX is more on the technical and psychological side.

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EDDIE JORDAN

Knowing how people react with different styles, layouts and formats can help to improve the UX value.

RETURN ON INVESTMENT AND CONVERSION RATES

Proven ROI gains from UX include overall revenue and conversion boost, fewer requirements for customer support and reduced development waste, which creates a more efficient process.

The impact of any UX activity is quantifiable. You can look at conversion rates, page bounce rates, how long users spend on specific pages as well as the pages that convert. It's golden data that every affiliate should look at.

With great user experience comes great efficiencies. Streamlining digital processes and simplifying system navigation can make life easier for the workforce, enabling them to execute more tasks efficiently.

PAGE LOAD TIMES

Long load times can cause drop-off before a player converts, often causing them to page-bounce within three seconds, so the process needs to run quickly and smoothly.

Reviewing site maps and the navigation of the site, as well as the value of all pages, may help define where the issues stem from.

Often, non-compressed images cause the biggest issues with load time, so be sure you are using the right specifications for creative. Once this is identified, it can be revised.

COGNITIVE BIAS

Cognitive bias in behavioural science is proven to influence purchase behaviour and decision making. These include category heuristics (short product

descriptions), power of now (the longer you have to wait, the less likely you'll click), social proof (testimonials), scarcity bias (showing stock availability), authority bias (client, compliance or payment logos) and the power of free (free gift with a purchase).

When placed on decision-making pages such as home, product or key landing pages, these components are proven to help remove doubt and encourage clicks. Almost like the cherry on top, sprinkle your site with these components and you have a good chance of increasing customer conversions and in turn improving your ROI.

UX QUICK WINS

If you can already see the potential for UX, take an unbiased look at your website and judge it based on these points:

IMPORTANT INFORMATION ABOVE THE FOLD

Make a conscious effort to put the most crucial information as high up the page as possible. If you cannot, make sure the navigation options are clearly visible there instead.

SIMPLE NAVIGATION

Conversion should be no more than three clicks away on a website and is a massive thing for designers and developers to consider. Navigation menus must be clear, concise and answer queries within a few clicks.

RESPONSIVE DESIGN

Responsive design means the content on the website can manoeuvre itself, so all information is visible on the device and is easy to use. Whatever the screen size, the site can respond and show a user-friendly interface.

“WHILE CUSTOMER EXPERIENCE AND USER EXPERIENCE ARE DIFFERENT THREADS OF THE BROADER CUSTOMER SATISFACTION BUBBLE, THE UX IS MORE ON THE TECHNICAL AND PSYCHOLOGICAL SIDE. KNOWING HOW PEOPLE REACT WITH DIFFERENT STYLES, LAYOUTS AND FORMATS CAN HELP TO IMPROVE THE UX VALUE”

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AN UNCERTAIN FUTURE

The coronavirus pandemic caused all major sport to be suspended in mid-March. It also forced affiliates to adapt their business priorities to offset losses. Tim Poole spoke with Better Collective CEO **Jesper Søgaard** to discuss the impact of COVID-19, expectations and plans for the rest of 2020



Alternative verticals such as esports and virtual sports have taken precedence with affiliates recently, and they've been able to reap the rewards.

Better Collective, for example, has seen opportunity during the coronavirus pandemic, with online gaming seeing a significant increase during the springtime lockdown. Of course, the halting of live sport had an effect on its core business: pre-pandemic, revenue was up 40% year-on-year for Q1, to €20.9m (\$24.5m). But April revenue, missing the key component of major sporting action, dropped 17% from 2019 to €4.6m.

Nevertheless, the acquisition of esports-focused CS:GO website HLTV.org in February, for a fee worth up to €34.5m, has allowed Better Collective to grow its business and benefit from a rise in esports traffic, amid a boom for the vertical.

Now that live sport is back, the pent-up demand for sports betting is expected to be music to the ears of the affiliate sector. But with much still up in the air regarding the current worldwide situation, *Trafficology* caught up with CEO Jesper Søgaard.

DURING THE PANDEMIC, THERE'S BEEN TALK ABOUT OPERATORS, SUPPLIERS AND HOW LAND-BASED HAS BEEN AFFECTED. BUT IN TERMS OF THE AFFILIATE SECTOR, WHAT ARE THE EFFECTS THE PANDEMIC HAS HAD? AND WHAT'S THE CURRENT SITUATION AS LOCKDOWN RESTRICTIONS ARE EASED IN DIFFERENT MARKETS?

Like we've seen with operators, there have been two things that have happened. Sports of course, reached a complete halt in mid-March, which affected sports betting, and Better Collective being a big sports betting affiliate, that obviously had an impact on us.

On the other side, online casino has been growing due to the shutdown of land-based casinos, so people have been going online. As a special case, we've also seen a lot of activity in esports and we did an acquisition just prior to the outbreak of HLTV.org, which is the leading community site for the popular game CS:GO. So for us there have been some pros and cons. We were, of course, very happy to see football returning with the German Bundesliga in May, and now we're really back

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JESPER SØGAARD

in Europe with sports, and soon in the US. It was definitely a frightening time at the beginning. We looked at our cost base to really make sure we were lean and ready to come out stronger on the back of all this.

A COUPLE OF KEY TRENDS YOU TOUCHED UPON THERE. IN TERMS OF ESPORTS, VIRTUAL SPORTS AND EVEN TABLE TENNIS BETTING, WHICH A LOT OF OPERATORS SAID WAS POPULAR DURING LOCKDOWN, ARE THOSE VERTICALS STILL GROWING AS QUICKLY AS THEY WERE A FEW MONTHS AGO?

I think there's a pretty big difference when you compare virtual sports with esports. Virtuals really boomed, which makes sense when you didn't have the real sport to bet on. But with esports, it's really its own vertical and there was a lot of conversion to it that seems like it's now sticking. Esports has reached a new plateau in terms of the number of bets placed, which we of course are quite excited about.

YOU TALKED ABOUT THE RETURN OF FOOTBALL AS WELL, WHICH IS BACK BUT DIFFERENT WITH NO CROWDS AND A LOT OF GAMES IN A SHORT AMOUNT OF TIME. HAVE THERE BEEN ANY TRENDS YOU'VE SEEN AS A RESULT?

From the betting perspective, the home team advantage isn't as strong as it normally is. What was interesting to me was the anticipation for football to come back, and in particular that the Bundesliga was the first league that started and we really saw an interest across the world for that league. I don't think there was ever as much interest in the Bundesliga as just prior to the restart of that league.

IN AUGUST WE'VE GOT THE UEFA CHAMPIONS LEAGUE IN A DIFFERENT FORMAT WITH ALL THE GAMES PLAYED IN A SHORT SPACE OF TIME. WHAT ARE BETTER COLLECTIVE'S EXPECTATIONS FOR THAT?

We're preparing for a quite intense period, almost you could say a bit similar to the European Championships or the World Cup. I think we may see there will be a slightly smaller interest if you look at the average of games, because they will be quite

condensed, like you say. But overall, we do see it as an important time for these games and especially for engaging our users, who will surely be looking for places to place bets.

BEFORE THE PANDEMIC THERE WAS AN EXPECTATION THAT EURO 2020 WOULD BE THE BIGGEST BETTING EVENT EVER. BUT WITH ITS SUSPENSION UNTIL NEXT YEAR, THAT DIDN'T PAN OUT. COULD SOMETHING LIKE THIS VERSION OF THE CHAMPIONS LEAGUE COMPARE TO THE NUMBERS WE MIGHT HAVE SEEN?

To be honest I don't think so. I think we'll have to wait until summer 2021 for experiencing that big championship effect that we always have with the major tournaments.

THAT'S CERTAINLY SOMETHING TO LOOK FORWARD TO NEXT SUMMER, BUT FOR THE REST OF 2020, WHAT ARE BETTER COLLECTIVE'S PLANS AND MAIN THINGS YOU ARE FOCUSING ON?

We still have a healthy pipeline and always have ongoing work here. We are relaunching VegasInsider.com, with a new version of the site ready for the NFL in September, which is something that I'm very much looking forward to. We'll continuously work with HLTV since it was acquired only in February, so there's still quite some work to do but it's still developing well, so we're happy about that. Those are probably the two biggest projects that we are looking forward to in the fall.

OVERALL, IN TERMS OF THE AFFILIATE SECTOR, DO YOU THINK IT CAN STILL KEEP GOING STRONG AT THIS TIME, OR ARE THERE ANY HURDLES TO WATCH OUT FOR AS THINGS COME OUT OF LOCKDOWN?

Obviously we need to see similar behaviour from the punters when all of this is settled. To me, it seems like that will happen but still there's more uncertainty in this new world, also with the risk of a second wave of COVID-19 that could impact sport. Uncertainty has gone up which means there is more risk than in normal times.

“I THINK THERE'S A PRETTY BIG DIFFERENCE WHEN YOU COMPARE VIRTUAL SPORTS WITH ESPORTS. VIRTUALS REALLY BOOMED, WHICH MAKES SENSE WHEN YOU DIDN'T HAVE THE REAL SPORT TO BET ON. BUT WITH ESPORTS, IT'S REALLY ITS OWN VERTICAL AND THERE WAS A LOT OF CONVERSION TO IT THAT SEEMS LIKE IT'S NOW STICKING”



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*THE AFFILIATE PROGRAM BEHIND TOP
CASINO BRANDS*

GERMANY: A SCIENTIFIC ANALYSIS

Dr Andreas Blaue, executive board member of the German Association for Telecommunications and Media (DVTM), speaks to Tim Poole about the body's new TV advertising agreement in Schleswig-Holstein, as well as Germany's proposed affiliate marketing ban



WHAT IS THE CURRENT ATTITUDE TOWARDS GAMBLING ADVERTISING IN GERMANY AND HOW DOES THE SITUATION COMPARE TO MARKETS LIKE THE UK, SPAIN AND ITALY, WHERE ADVERTISING IS RECEIVING VARYING LEVELS OF SCRUTINY?

In Germany, there is a totally unclear situation. At the moment, there is an enforcement of the state treaty of gambling 2012, and the Prime Ministers of the federate states confirmed a new interstate treaty will come into force in the middle of next year. Now we are in between the two. That means you have to divide into several segments of gambling when you think of advertising. For sports betting, you have the situation where all providers that have submitted an application for a German license, based on the current interstate treaty, can advertise without any serious restrictions. There will not be any obstacles against such advertising activities. As far as providers with an EU license are concerned, in my opinion

the research should not be different. Following the decision of the administrative court of Darmstadt from 1 April 2020, the licensing procedure in Germany for sports betting providers is suspended. It means based on EU law, all providers with an EU license can advertise their sports betting offers at the moment.

A little bit more difficult is the situation concerning casino. There we have providers with a Schleswig-Holstein license. These licenses were renewed in June 2019 based on a new law that expressly allows nationwide advertising of licensee gambling offers, especially on nationwide TV. That was also a big success for our association of telecommunication and media. We reached an agreement in Schleswig-Holstein with the Ministry of Interior that nationwide TV advertising for these licensees is not a problem.

But when you think about social online casino and poker providers without any license in Schleswig-Holstein, then you have a clear situation that advertising is not allowed and these providers have to be aware serious obstacles will come when they are present on German media platforms. So that means it's a very widespread situation at the moment, with an unclear basis. The new interstate treaty will create a new basis for this, so that means the rules of this new treaty comprises of some advertising rules for TV and also some digital platforms. But at the moment we have this uncertainty concerning legal situations.

THE DVTM HAS SPOKEN OF FALSEHOODS BEING SPREAD BY RIVAL INTEREST GROUPS. HOW DIFFICULT IS IT TO COMBAT SUCH AN ANTI-GAMBLING NARRATIVE?

It's not easy to go against these claims. But our way is that we try to create a scientific analysis of the situation concerning TV advertisements nationwide. That means we collect and monitor all minutes of TV commercials to create an objective basis for the discussion. We've come to the result that the claim that the volume of advertisements on nationwide TV starting rising at the beginning of the coronavirus crisis wasn't true. Between August 2019 and May 2020, the volume of TV commercial minutes decreased nearly 40%. There was no increase at the start of the coronavirus crisis. That's the scope and result of our analysis – it's our task to communicate these clear numbers and to create and show an objective basis for the discussion.

That's not so easy because this discussion is, in the end, political. There are stakeholders, such as providers for offline spin machine shops, which is a very big industry in Germany, and also some politicians who don't want to go this way of a new gambling treaty. These parts of the political spectrum and these offline providers are not interested in a real discussion. Our task is to communicate the fact that we should only discuss real numbers on a scientific basis.

GAMBLING CRITICS ARE OFTEN QUICK TO DISMISS THE NEED FOR HARD DATA. HOW CAN YOU OVERCOME THAT RESISTANCE?

The claim to say "we have too much advertising" is only a claim. We are not only able, we are willing to discuss it but on a number basis, not based on emotions. Using our model, we collected the minutes on all free TV channels in Germany concerning advertising slots. From this mass, nearly 20% is the whole volume of minutes for gambling. From this 20%, 3.4% we reserved for online casino advertisement for Schleswig-Holstein. That means only 3.4% of 20% of all minutes are reserved for Schleswig-Holstein casinos advertising on nationwide TV.

That doesn't mean the whole volume will broadcast every month, but a maximum border on minutes per month, which can be advertised from all licensees. But in the end, it's a very small percentage. This, in our eyes, is the basis for discussion. It could be that it's too much or too little, but without any basis to discuss, it's very

difficult because it's only political statements. That's not an approach for us to come to a solution in the industry.

HOW SMOOTH WAS THE NEGOTIATION PROCESS FOR THE NEW SELF-REGULATED ADVERTISING LIMIT IN SCHLESWIG-HOLSTEIN?

It was a very fair process, with the respect of all parties. It lasted some months, it's true, but at the end we came closer and closer to a solution based on facts. It was fair and a transparent negotiation process. We are satisfied about that.

ARE YOU CONFIDENT THIS WILL REMAIN IN PLACE FOR SOME TIME TO COME, WITHOUT ANY FURTHER REGULATORY INTERVENTION?

There will be some serious changes in the future. The current Schleswig-Holstein situation will end with the start of the new interstate treaty, and then comes a consistent nationwide system. When this starts, from the middle of 2021 onward, we will get new advertising regulations, comprising of some new restrictions. For example, there will be an advertising ban for online casino and online poker for TV between 6am and 9pm – that's new.

Another example, which in my view is much more of a problem, is that affiliate marketing will be completely forbidden. There will be no place for affiliate marketing campaigns with providers at the end. That's a very serious change. There are some smaller ones that will be part of the common licenses. But the advertising ban and restrictions on affiliate marketing are our biggest issues for the future.

AFFILIATES, OF COURSE, FORM A WHOLE INDUSTRY. WHAT WAS THE THINKING BEHIND A TOTAL BAN IN THESE PROPOSALS?

I'm not a defender of these state policies, to be clear. In Germany, it's not a comparable approach to, perhaps, the UK. This gambling branch is much younger and there's no historical situation for the users in the market. So it's a new phenomenon of the last 10-12 years. I remember in 2002, the first one, Bwin, started to offer sports betting in Germany; that was the starting point. That was 18 years ago. With little steps, we created a market and came to a regulated market starting next year. The responsible politicians are not experienced in this field of regulation.

On the one hand, they try to lead users to licensed operators. But on the other, they fear that when users are not so much triggered by advertising and rather affiliate marketing approaches, where this system of affiliate marketing will achieve the most turnover and the most registrations, then the market will develop in a way that will be more dangerous for the user. I think that's the biggest picture behind this. But it's not in the knowledge of the politicians to understand how this market works. Starting next year, I'm not convinced we can develop a very good working gambling market that is comprised of all interests of the stakeholders on the politicians' side, as well as on the side of the providers.

REASSESSING FUTURE DIRECTION

H2 Gambling Capital senior analyst **Ed Birkin** revealed at iGB Live the impact the coronavirus pandemic has had on the betting industry, and what trends we can expect to see in the future



The return of major sport allowed the sports betting industry to breathe a collective sigh of relief. The German Bundesliga was the first major league to resume on 16 May, with the Premier League following suit a month later, on 17 June. Most of the major worldwide sporting leagues are now back underway after a two-month absence, with action in the US returning in July.

Live sport and sports betting returning is a welcome boost to operators and affiliates, but it represents just the start of the long road to recovery, with the

industry still expected to be heavily impacted by the coronavirus pandemic.

Figures from gambling data specialists H2 Gambling Capital reinforce the huge reduction of revenue expected. Speaking at iGB Live in July, senior analyst Ed Birkin gave insight into the COVID-19 impact on sports betting.

The betting sector, which the data firm defines as including horse and dog racing, and sports betting among other verticals, generated gross revenue (GGR) of \$71bn in 2019, according to its figures. Sports betting,

excluding horse and dog racing, accounted for 55% of the entire betting sector, and the annual figure represented 16% of the total gambling market, which includes lotteries.

Taking into consideration the reliance the betting sector has on sports betting, the suspension of live sports having a profound impact on industry revenue hardly comes as a shock.

To demonstrate the impact of the pandemic, H2 Gambling Capital now forecasts betting GGR for 2020 to be \$60bn, a 21% downgrade from the \$75bn predicted at the start of the year. That new 2020 figure is also a 15% year-on-year fall.

"The downgrades are partly due to the suspension of live sport but also due to physical betting locations," Birkin explains. "The impacts on the land-based and online segments are very different."

And that difference is shown by the fact interactive betting GGR is down 10% compared to H2 Gambling Capital forecasts at the start of the year, with land-based GGR reducing by 29% due to venue closures.

Speaking about the figures and the potential lasting impact of the pandemic, Birkin said: "While there's little data out there about how much betting volumes have returned since the resumption of major football leagues, it's clearly been very good news for the bookmakers.

"However, a number of sports are yet to return, such as tennis, and there's still a number of retail betting closures. Those that have reopened have done so with limited functionality.

"In terms of the lasting impact of the pandemic, when you look at the UK betting market over the last 50 years, you can see some correlation with GDP growth.

"There have been a few peaks with gross win that aren't coupled with GDP, which tends to be around new products or significant changes in technology – a shift to online, mobile and an acceleration to in-play.

"One thing we've seen in times of GDP declines and shocks to the financial market is betting gross win has declined. There's a significant drop in GDP this year and a significant rebound expected in 2021, but over the next couple of years, GDP is forecast to be lower than it was before the pandemic, which is likely to impact betting activity going forward."

One of the biggest trends from the pandemic has been the acceleration to online gambling, something Birkin picked up on from H2 Gambling Capital's forecasts. Since the pandemic, total betting activity forecasts are now 4% lower for 2021 and onwards, and around \$3.5bn lower in GGR each year than predicted before the outbreak.

Birkin explained: "This is driven by high single-digit declines in retail sports betting activity, particularly offset by slightly higher forecasts in the online market.

"This means the proportion of activity moving online has accelerated and by 2024, we forecast the proportion of betting activity online to be 3% higher than we thought previously, so around 50% of the market by 2024."

The shift to online is a key factor for operators to consider in the future when it comes to the retail side of their business, particularly in the UK. The maximum stake on fixed-odds betting terminals (FOBTs) was reduced to £2 (\$2.62) in April 2019, forcing operators to reassess their use for betting shops, with William Hill closing 700 after the reduction was made.

While Birkin believes there's still a place for retail betting shops in the UK, the pandemic could be the perfect time for operators to re-evaluate priorities.

"One of the big questions the operators had to ask themselves after the FOBT limits, was were they going to keep some of their shops open, almost as a bit of a loss maker just to promote their brand, using it as a gateway for their online product?" he said.

"The acceleration to online will be a good time for operators to re-evaluate their portfolio. I'm sure we won't see every betting shop reopening or staying open. For more to be going after the FOBT reduction is a nail in the coffin for that part of the industry but I don't think it'll be the end for betting shops; there will always be a place for retail betting in the UK."

The big talking point in the betting industry during lockdown, however, has been the rise of the esports and virtual betting verticals. Statistics from OddsMatrix showed in the two months from the suspension of live sport in mid-March, there was a 40-times growth in the esports betting market. While speaking at AffiliateCon Virtually Live in May,

"THE ACCELERATION TO ONLINE WILL BE A GOOD TIME FOR OPERATORS TO RE-EVALUATE THEIR PORTFOLIO. I'M SURE WE WON'T SEE EVERY BETTING SHOP REOPENING OR STAYING OPEN. FOR MORE TO BE GOING AFTER THE FOBT REDUCTION IS A NAIL IN THE COFFIN FOR THAT PART OF THE INDUSTRY BUT I DON'T THINK IT'LL BE THE END FOR BETTING SHOPS; THERE WILL ALWAYS BE A PLACE FOR RETAIL BETTING IN THE UK"

"IN SOME REGIONS, THE BLACK MARKET HAS WITHOUT A DOUBT SIGNIFICANTLY BENEFITED FROM THE COVID-19 CRISIS. SOME OF THOSE CASES IT'LL BE A SMALL SHIFT BUT SOME OF THEM WILL BE BIGGER. ANY GROWTH IN THE GAMING INDUSTRY WILL BE AMPLIFIED ON THE BLACK MARKET. BLACK MARKET OPERATORS WILL BE TAKING ADVANTAGE OF THE SITUATION AND HAVE PROBABLY GOT SOME SIGNIFICANT MARKET SHARE"



Golden Race CEO Martin Wachter said that in terms of average players, virtual sports increased by 206% as a result of the pandemic.

Despite the apparent boom from what were considered more niche markets, H2 Gambling Capital data shows the two verticals still represent a very small part of the overall betting market.

Birkin relays the figures: "In 2020, we forecast esports to grow by 25% year-on-year, which still only equates to 1.3% of the overall sports betting market. But in terms of the online only market, this equates to 3%.

"For virtuals, we estimate an increase to just under 6% of total betting activity and total virtual betting activity to be flat year-on-year. The fact we don't have any growth for virtual betting may surprise some people, but a very large part of the virtual sports betting market takes place in retail betting shops, and the closure of these premises for a long time has been a significant headwind compared to the strong growth of virtual betting activity online.

"Growth being seen by traditional bookmakers who had esports as a tiny product pre-lockdown is very different from the growth being seen by esports-specific sportsbooks, whose customers are esports enthusiasts. When you dig down, you see a very different story to what you may believe from the media hype."

In closing, Birkin reiterated the fears of a rise in black market play, which has been a sizeable concern for the industry, particularly during the lockdown

period. Tightened restrictions in response to the pandemic in countries like Lithuania, France, Sweden, Belgium and Spain may continue to drive players to the unregulated sector.

"In some regions, the black market has without a doubt significantly benefited from the COVID-19 crisis," Birkin explains.

"Some of those cases it'll be a small shift but some of them will be bigger. Any growth in the gaming industry will be amplified on the black market. Black market operators will be taking advantage of the situation and have probably got some significant market share games on the back of it.

"The big opportunity or threat to gaming right now is how they can legitimately address regulators' concerns, take advantage of the need for tax revenues and convince regulators that if they take too much of an aggressive stance, it'll be to the detriment of the legal market, and to operators overall."

So, even though the betting sector has been adaptable during the coronavirus pandemic, the H2 Gambling Capital data emphasises the importance of sports betting to the sector. The rise in esports and virtual sports won't make up for the lack of revenue caused by the suspension of live sport; but the acceleration to online provides plenty of food for thought to operators on what the future might look like.



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PLAY HARD

Jelena Oceretova, affiliate team lead for PlayAttack, speaks with *Trafficology* about her need for speed and love for travelling

PLAYATTACK'S REPRESENTATIVE HELMET GUY LOOKS LIKE HE KNOWS HOW TO HANDLE HIMSELF AT SPEED. IF YOU WERE A RACE CAR DRIVER, WHAT WOULD YOUR NICKNAME BE AND WHY?

That's an amazing question. I really love driving and I actually do it pretty well #saynotostereotypes. I don't own a car here in Malta, but I used to just love driving for hours. Honestly, it relaxes me so much – the speed, the music, the sense of relaxation and freedom.

That said, Helmet Guy immediately thought that I was the perfect fit for PlayAttack. Now that I think of it, I know why. Nickname? Maybe Panamera? I think it sounds cool. And I love this car model too!

NOW HELMET GUY IS TAKING YOU FOR A SPIN ON THE BACK OF HIS NEW MOTORBIKE. WOULD YOU BE GRIPPING ON FOR DEAR LIFE, OR WOULD YOU BE RELAXED AND ENJOYING THE RIDE?

I would definitely simply enjoy the ride. Speed doesn't scare me, and even if it did, Helmet Guy is trustworthy and I know he would never put someone at risk.

FOR MOST OF US, SUMMER HOLIDAYS ARE OUT OF THE QUESTION THIS YEAR, BUT WE CAN ALL FANTASISE. DO YOU PREFER LAZING BY THE BEACH IN A HOT COUNTRY OR SKIING DOWN SLOPES IN A COLD COUNTRY?

Ah, don't remind me. I'm actually very bitter over this, because I simply adore travelling and I like flying away (even if it's just a short trip) every two months or so. I'm normally very decisive, but you got me on this one. I would have to go with both options.

SADLY, FLYING IS ONE OF MY FEARS SO TRAVELLING CAN BE TOUGH. WHAT WOULD YOU SAY IS YOUR BIGGEST FEAR AND HAVE YOU EVER TRIED TO FACE IT?

My biggest fear is snakes. I even know a fancy Greek term for that called Ophidiophobia. Honestly, I cannot even imagine what I'd do if I stumbled across a snake. Probably faint.

IF YOU HAD A PLAYLIST OF THREE SONGS TO LISTEN TO FOR THE REST OF YOUR LIFE, WHAT WOULD THEY BE AND WHY?

I have been a huge fan of vocal trance music since my childhood and can hardly imagine giving up on it at some point in my life. I've been to so many festivals and concerts already, and I always try to attend them when there's an occasion. My top three songs would be Nilsen feat. Matluck – The last Goodbye (Matt Fax Remix); Jennifer Rene & Eco – Running; and Calvin Harris & Sam Smith – Promises.

YOU SUDDENLY HAVE THE POWER TO LEARN ANY MUSICAL INSTRUMENT INSTANTLY, WHICH INSTRUMENT WOULD YOU CHOOSE?

Does a DJ Set count as an instrument? I always wanted to learn how to mix music. To me it's a magical process that requires mastery and I'm captivated by the way artists harmonically blend different sounds.

FINALLY, TELL US YOUR FUNNIEST OR FAVOURITE STORY FROM YOUR TIME AT PLAYATTACK.

This one's difficult. I don't even know how to capture this amazing vibe we have in the office without giving all the context. The thing is our team is a true gem. Every day is filled with giggles. Even when we're seriously preparing our monthly reviews and presentations, there's so much positivity and creative spark in the air. On the funny side of things, I've been with PlayAttack for long enough not to keep making the same mistake over and over again. But I keep trying to enter our building with my VISA card in the morning. Either I'm not a morning person or the funds are insufficient to buy the entire building, because I surprisingly never managed to get in.





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