

trafficology

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RIDING IT OUT

How to stay on track as the industry navigates unexpected twists and turns



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Hey guys! Today's serious bit of #igamingnews is hot off the press from Spain!

It seems that the Spanish government has rolled out stricter regulations for gaming operators. Well, maybe not so suddenly... they went into effect in April, but back then it was like: "Don't worry guys, it's temporary, we'll lift the ban once the quarantine is over, 100% guaranteed!"

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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. In this edition, we focus on web portal owners, including affiliates themselves, other media groups and operators. The below is a breakdown of the top 20 web portal owners by vertical for October 2020, including overall, casino, sports and poker across all devices (desktop, mobile and tablet).



OVERALL

Rank	Name	Website
1	ESPN	espn.com
2	Akuate Internet Services	akuate.com
3	LiveSport Media	livesportmedia.eu
4	Fusion Media	investing.com
5	LiveScore	livescore.com
6	CBS Interactive	cbsinteractive.com
7	RCS MediaGroup	rcsmediagroup.it
8	NBCUniversal	nbcuniversal.com
9	Sky Betting & Gaming	skybet.com
10	Editions Philippe Amaury	francefootball.fr
11	Better Collective	bettercollective.com
12	Net Dreamers	netdreamers.co.jp
13	Marzen Media	marzenmedia.com
14	Turner Sports Media	pressroom.warnermedia-group.com/us/brands/turn-
15	Tribuna Digital	tribuna.digital
16	Grupo Zeta	grupozeta.es
17	Gazzetta Online	gazzetta.gr
18	Meredith Corporation	meredith.com
19	Cofina	cofina.pt
20	Ringier Axel Springer	ringieraxelspringer.com

CASINO (MOBILE)

Rank	Name	Website
1	Better Collective	bettercollective.com
2	Catena Media	catenamedia.com
3	Ample Chance Group	lcb.org
4	RakeTech	raketechnology.com
5	Gambling.com Group	gambling.com/corporate
6	OGM	oddscheckerglobalmedia.com
7	Casino City	infotechsys.com
8	SYC	syosl.com
9	Acroud	acroud.com
10	Better Collective Greece	bettercollective.com
11	XLMedia	xlmedia.com
12	Game Lounge	gamelounge.com
13	SimSlots	freeslots.com
14	House Tech Ads	housetechads.com
15	CAB Magazine	cabmagazine.es
16	Loquax	loquax.co.uk
17	Topboss Group	topbossgroup.com
18	CG Holdings	casino.org
19	J & L Solutions	casinoarena.cz
20	Good Game	goodgameltd.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)

SPORTS BETTING

Rank	Name	Website
1	LiveSport Media	livesportmedia.eu
2	Better Collective	bettercollective.com
3	ESPN	espn.com
4	Akuate Internet Services	akuate.com
5	Sky Betting & Gaming	skybet.com
6	CBS Interactive	cbsinteractive.com
7	Editions Philippe Amaury	francefootball.fr
8	LiveScore	livescore.com
9	RCS MediaGroup	rcsmediagroup.it
10	Net Dreamers	netdreamers.co.jp
11	Catena Media	catenamedia.com
12	Ringier Axel Springer	ringieraxelspringer.com
13	NBCUniversal	nbcuniversal.com
14	Tribuna Digital	tribuna.digital
15	Grupo Zeta	grupozeta.es
16	Sportal Media Group	corp.sportal.bg
17	SYC	syosl.com
18	Bell Media	bellmedia.ca
19	Gazprom-Media Holding	gazprom-media.com
20	24Media	24media.gr

Rank	Name	Website
1	Stars Group	starsgroup.com
2	Catena Media	catenamedia.com
3	SYC	syosl.com
4	Acroud	acroud.com
5	Ample Chance Group	lcb.org
6	CJM Solutions	sharkscope.com
7	Two Plus Two	twoplustwo.com
8	180Vita	180vita.com
9	Rical	rotogrinders.com
10	Aureka Internet	educapoker.com
11	Playtech	playtech.com
12	RakeTech	raketech.com
13	SportyTrader	sportytrader.com
14	Card Player Media	cardplayer.com
15	SG Digital	sgdigital.com
16	CC Internet Media	cardschat.com
17	Studio W Agency	studiow.agency
18	J & L Solutions	casinoarena.cz
19	Mediarex Enterprises	chiliz.com
20	Game Lounge	gamelounge.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.

MEET THE TEAM: WHOW GAMES

Trafficology meets **Adrian Valett, Kevin Kunkel** and **Tobias Edl** of Whow Games, who tell us about everything from how they got into gaming to enjoying a night out when the work is done

ADRIAN VALETT, MARKETING MANAGER

How did you get into the gaming industry?

I kind of randomly slid into the gaming industry. As a hobby esportser, I created some initial websites for my own gaming clan. During this time, I came into contact with affiliate marketing as a publisher and realised that you can actually earn money this way. With a healthy portion of learning by doing, I gained a much deeper and more intensive understanding of the materials of which the world of gaming and its marketing consists. I then created several more of my own affiliate websites. After a couple of years of self-study, I applied as a career jumper with Whow Games, switching sides

from being a publisher to being an advertiser, and turned my gaming world hobby into my profession.

What is your day-to-day role with the company?

My job consists of maintaining daily contact with our partners and affiliates. The best possible partnership is only possible with solid support and a healthy exchange of information. Above and beyond this, I administrate our app presence in various app stores. You can increase the conversion rate considerably by regularly testing various factors of influence.

What do you get up to in your spare time?

After tearing a ligament while playing soccer, I came to discover a new passion in playing beach volleyball. I've naturally remained true to gaming all the while and continue to actively play Dota 2 and Counter-Strike GO with my friends. In addition, I love to go skiing in the winter and also enjoy partying on the weekend. After all, life is there to be enjoyed.

What is your favourite thing about the gaming industry?

What makes the gaming industry so wonderful is that everything is moving quickly and there's constant further development. There are always better and more advanced ways of improving the gaming experience. It could be via VR glasses or that you can take a lot of your games with you anywhere right in your smartphone. I'm very excited to see where things are headed and what it's all going to look like in the future. Will we all have VR contact lenses or a chip in our heads that controls everything? I can't wait to see what's next in the evolution of the gaming industry.

KEVIN KUNKEL, MARKETING CONVERSION OPTIMIZATION

How did you get into the gaming industry?

It's always been my goal to jump right into the gaming industry and that's how I kicked off my career at BigPoint, a company that produces and markets online browser games. I had always enjoyed playing esports games that are particularly competitive like Dota 2 und CS-GO. So, as you can see, I'm





KEVIN KUNKEL

pretty into gaming, which has meant that graphic designing and game marketing is really right up my alley as a career profession. Once I joined the team here at Whow Games, I was able to optimally bring these aspects to the table to enhance our casino business and innovatively position our marketing efforts.

What is your day-to-day role with the company?

My work consists of focusing on landing pages, ads and conversion optimisation of the current marketing campaigns to allow our users the best possible onboarding experience imaginable. After all, the easier it is for our users to make use of and navigate around our site, the more possible the scaling efforts of our marketing team will be. For any ads, playable ads and video ads, my team and I are able to whip up innovative and creative ideas and new web formats.

What do you get up to in your spare time?

I'm the kind of guy who really believes in functional fitness and functional nutrition in order to make it through the day with a sufficient balance of muscle and overall stability. I also enjoy constantly improving myself in other facets of my life and am a big fan of optimisation. Whenever I'm not spending time with my two ladies, my girlfriend and our dog, then I enjoy spending a night on the town with my friends and a real fine whiskey.

What is your favourite thing about the gaming industry?

I love the fact that the gaming industry is in a fast and constant state of transformation. With our social casino and our other products, we're able to make use of gamification

at many levels and achieve our step-by-step goals in a very playful manner.

TOBIAS EDL, HEAD OF NEW BUSINESS RELATIONS

How did you get into the gaming industry?

I joined Whow Games back in 2018, but I spent the previous 17 years working with media outlets, including Interactive Media, now Ströer, the leading marketer of digital media in Germany. This was my first step into the business. From there it was only a short step into the gaming industry in Hamburg. During my 16 years in the gaming industry, I worked for such companies as InnoGames and King.com where I ran the international business development unit.

What is your day-to-day role with the company?

As head of new business relations, I'm responsible for cooperative web and mobile endeavours, both in Germany and internationally. I describe my work as classic business development with a strong focus on user acquisition. Networking is the essential aspect of my work and is also the way I came to meet the people of Whow Games.

What do you get up to in your spare time?

When I'm not working, I love to travel with my family and explore the world. I also love barbecue and I'm addicted to new tech gadgets.

What is your favourite thing about the gaming industry?

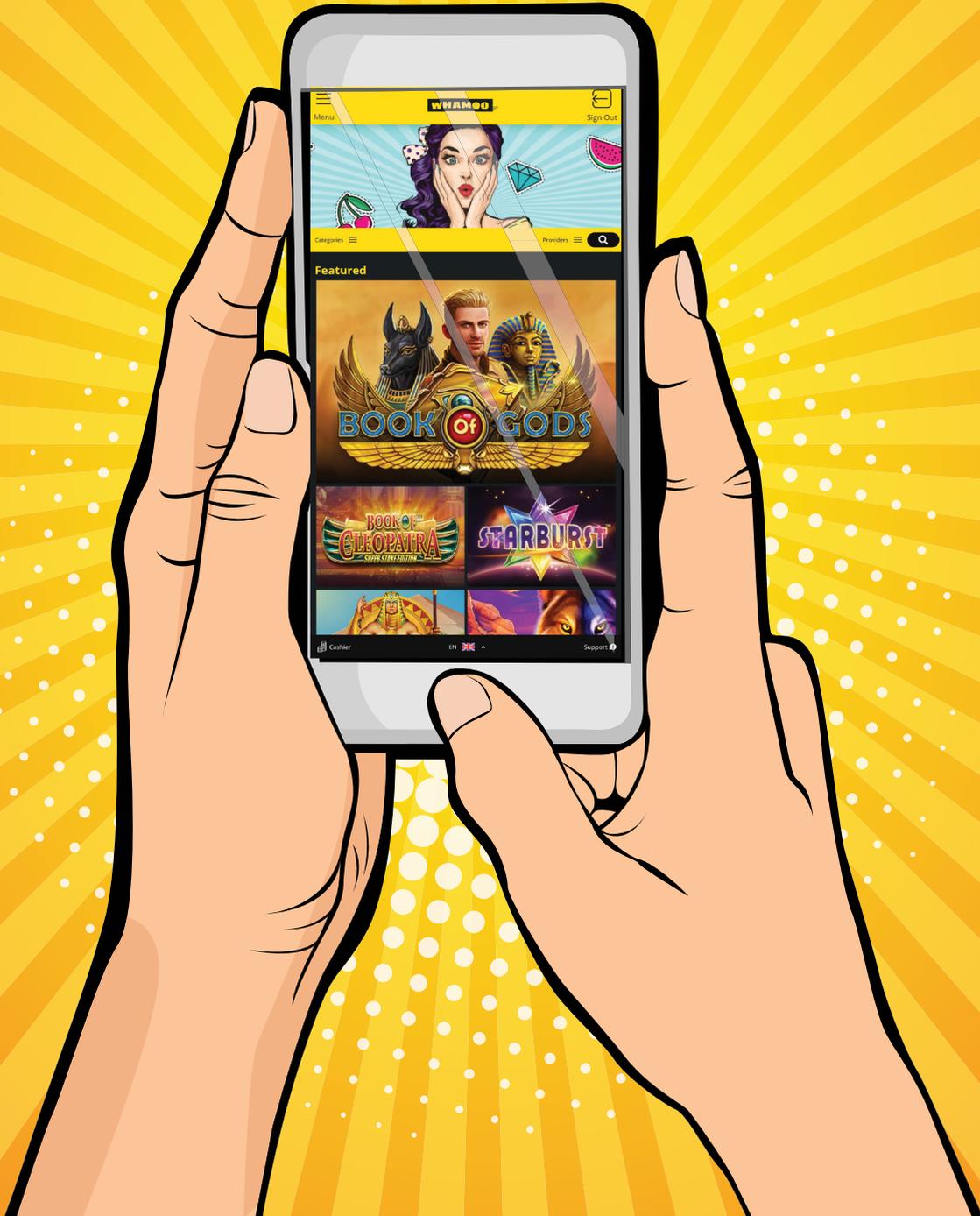
I was inspired to pursue my career because it offered the opportunity to create something from scratch. This is a career that I value so highly that I can't imagine not being involved in the gaming industry. My golden rule: Be yourself and don't cheat people; you will always meet them twice.



TOBIAS EDL

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ON TRACK

2020 certainly wasn't what Raven Track expected during its first full year in existence. Despite the challenges, general manager **Adam Rowley** is pleased with the affiliate tracking platform's progress since forming in 2019, and speaks to Iqbal Johal about his optimistic aims for 2021



not being able to meet new and existing clients in person, so we have our fingers crossed that we'll be able to start doing that again in the not too distant future. Regulation changes are always aplenty within our industry as well, but we've navigated those successfully and hope that our clients can already see the positive impact from the changes we have implemented over the past few months.

Did the pandemic slow down progress or is Raven Track more or less at the level you'd expect it to be at, less than two years since forming?

2020 has really been a breakthrough year for us, and credit goes to the whole team for continuing to work hard in difficult circumstances and help us to achieve all the goals and targets that we set for ourselves. When the pandemic struck, the economic world was going into the unknown, so along with everybody else, we were understandably concerned at what could lie ahead. Thankfully, we were able to quickly alter the way we go about our work and acclimatise to the new normal, so we've been fortunate to have effectively continued, as we would have done, just with some staff working from home.

How much of an impact did the pandemic have on the affiliate sector in general, and how do you rate the sector's resilience battling through it?

On the whole, the affiliate sector is mainly digital with providers, operators and affiliates regularly working and communicating online, so it hasn't really caused that many issues in that respect. However, the lack of sports to begin with obviously had a negative effect on sportsbook affiliates and reduced the amount of events that were open to sponsorship opportunities. That has improved somewhat with the return of sport since the summer, but the lack of crowds means the numbers are a little less than usual.

What are the trends we can expect to see from the affiliate sector heading into 2021?

This year has been a year of change for many reasons and I think we'll start to see more innovative thinking when it comes to getting ahead of the game in the affiliate industry. We'll add more features to the platform, which will further help affiliates and clients to generate better traffic than ever before. In Q1 2021, I'd expect to see further UX/UI development across the sector and with an in-house team of our own, we're well placed to be at the leading edge of those improvements.

With Raven Track a relatively new company launching last year, has 2020 been the breakthrough year the company was hoping for, and how do you rate your progress during these 12 months?

Obviously, 2020 has been a year like no other and has been difficult for people across the globe, not just here in the UK. However, the industry has gone from strength to strength during the pandemic, and although we expected business to slow, we've seen the opposite. To date, we've helped to track activity for more than 40 brands across 12 platforms, as well as 12 new white-label integrations. The future is looking positive and as we begin to emerge out of the second lockdown, we're confident that the upward trend will continue well into the New Year and beyond.

What have been the biggest challenges for Raven Track to navigate through in 2020?

We're happy with the progress we're continuing to make and look forward to what's next. As a company that prides itself on a personalised experience for all our users, it's been difficult



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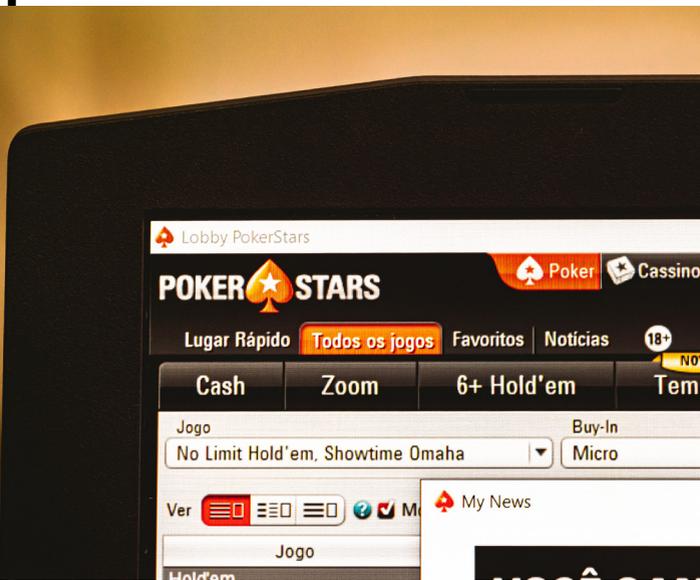
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ONLINE POKER: THE SECOND BOOM

Owain Flanders takes a look at the resurgence of online poker amid the COVID-19 pandemic and assesses whether this popularity could continue into the New Year



effect," referring to online poker's first period of substantial growth in the early 2000s after Chris Moneymaker's triumph at the 2003 WSOP. This growth is clear to see in the financial results of the industry's online poker operators.

In May, Flutter Entertainment completed its acquisition of The Stars Group, owner of online casino and poker operator PokerStars, something Flutter executives should certainly be thankful for in hindsight. For H1 2020, Flutter saw revenue growth of 49% to £1.52bn (\$2.01bn). Commenting on his company's results, Peter Jackson, Flutter CEO, described many challenges throughout the financial period. However, he said these had been "more than offset by an increase in the number of recreational customers playing poker and gaming products globally."

For the same period, 888 Holdings saw similar growth in its poker vertical. The operator saw online poker revenue increase by 56% year-on-year, to a total of \$36.1m. Of the company's segments, this was the highest year-on-year increase, beating even online casino, which posted 48% growth. The majority of that growth was in the UK market, where 888 saw an increase of 205% in new customers, in comparison to a 59% rise in the US.

Evidently, this has been a profitable time for those able to capitalise on the second online poker boom. But as we look towards 2021 and a hopeful end to the COVID-19 pandemic across the globe, will we see online poker's popularity fade?

A gradual levelling out of online poker growth is already evident in Flutter's results for the year. While the operator's poker segment saw growth of 38% for the first half of 2020, this fell to 5% for the year's third quarter. This was predicted by The Stars Group back in Q1 when the operator appeared relatively pessimistic about the longevity of the vertical's success. In its Q1 update, the company admitted the return of sporting events earlier than anticipated could benefit sports betting revenue but would "negatively impact the current increased activity across its online poker and casino products".

If second lockdowns in some regions such as the UK have the same effect as the first, then we could see another increase in poker's popularity. But with COVID-19 vaccines being developed, it could be that this is short lived. For online operators, though, it will be about retaining the players they've been able to acquire throughout the year. If they're able to do so, then it could be a profitable 2021 for online poker operators and their affiliate partners.

Speaking with *Gambling Insider* earlier this year, Jamie Harvey, a news writer for The Big Blind blog and representative of Winning Poker Network (WPN), described an unprecedented increase in WPN tournament entries in 2020. "We had to take preventative measures such as making our main events two-day events because the server load was becoming dangerously high," he explained. "This was despite the addition of dozens of servers."

The reason for such a sudden increase in online poker tournament entries was due to the impact of the COVID-19 pandemic. From March, the cancellation of sports put a temporary halt to sports betting and increased traffic to alternative verticals. Added to that, potential customers were locked at home with plenty of time on their hands and access to the internet. Online poker operators were placed within the small category of gambling companies able to benefit from what was an otherwise dire situation.

As a result, companies offering online poker services saw a boom in profits in the middle of the year. Speaking on a panel during an SBC Digital Summit, Ivonne Montealegre, founder and event director of the Malta Poker Festival, explained how some markets across the globe had doubled in size as a result of the pandemic. She described the lockdown-fuelled online poker popularity as a "second wave even bigger than the Moneymaker

SPORTS BETTING – STILL STANDING TALL

Iqbal Johal reviews the agony, anxiety and anticipation the sports betting sector endured during 2020, and what lessons can be learned

The sports betting sector has been on a roller-coaster throughout 2020. When looking at the online gambling industry, sports wagering was arguably the vertical most impacted by the coronavirus pandemic.

It was a year that promised so much, with the usual array of sporting action, culminating in a festival of sport with the Olympics and UEFA European Championships taking centre stage in the summer. However, with English football postponed indefinitely on 13 March, what followed was a spate of suspensions across all major sporting leagues and tournaments, with the Euros being delayed by a year. Suddenly, the likes of the Belarusian Premier League and table tennis were the staple leagues and sports offered by both operators and affiliates.

To demonstrate the effect the suspension had on the affiliate sector, Spotlight Sports Group's *Racing Post* newspaper was forced to cease publication on 25 March, with then CMO Louise Agran telling AffiliateCon Virtually Live that "we didn't have enough relevant content for our audience to put in the paper and enough to justify the price of the paper". However, it returned to circulation on 1 June as British horseracing re-started.

The outlook didn't look pretty, with figures in July from gambling data specialist, H2 Gambling Capital, forecasting betting sector GGR, made up of horse and dog racing, sports betting among other verticals, to drop to \$60bn for 2020, a 21% downgrade from the \$75bn predicted at the start of the year. That figure would also represent a 15% year-on-year fall.

But the sector showed versatility and adaptability, by quickly turning their offering to the aforementioned so-called lesser products, such as football leagues in Belarus and Nicaragua, as well as new and unprecedented concepts like the PDC Stay at Home darts tournament, conceived to replace live darts. "Speaking in May, Agran also said that regardless of the stature of the sport offered, the likes of the *Racing Post* were providing content on it to inform audiences, demonstrating the flexibility the affiliate industry continues to show.

That made the return of major sport, led by the Bundesliga on 16 May, even sweeter, with the Premier League following suit a month later. The conclusion of major European leagues in July, followed by a tournament-style summer Champions League in August, then the start of the 2020/21 football season in September, meant operators and affiliates were back to full flow with their sports betting offering.

The importance of sports betting to the industry can be reinforced by several Q3 2020 financial results. Better Collective was able to post a 7% yearly growth in Q3 revenue up to €18.3m (\$21.7m) thanks to the return of major sporting events and leagues

"THE IMPORTANCE OF SPORTS BETTING TO THE INDUSTRY CAN BE REINFORCED BY SEVERAL Q3 2020 FINANCIAL RESULTS. CUSTOMER INTERACTION THROUGH CAMPAIGNS AND REACTIVATION MESSAGES WAS ALSO KEY TO AFFILIATES AND OPERATORS MAKING CUSTOMERS AWARE OF THEIR OFFERING UPON THE RETURN OF MAJOR SPORT"

worldwide. That was in stark contrast to the 4% fall seen for Q2, during the height of the pandemic.

Operator Kindred Group saw its revenue increase 24% for the third quarter from 2019, with GGR up to £280.7m (\$372.3m). This was mainly due to the return of a fully fledged sporting calendar, with its sports betting GGR rising 11% higher than last year.

Customer interaction through campaigns and reactivation messages was also key to affiliates and operators making customers aware of their offering upon the return of major sport. As ex-Interwetten speaker of the board Dominik Beier told *Trafficology* sister magazine *Gambling Insider* in July, marketing to new and existing customers helped the operator record higher turnover in June and July than pre-coronavirus. Aside from showing how flexible and agile the sector can be, there are plenty of lessons to learn from the pandemic, with Beier saying it has shown everyone that with "entrepreneurship, innovation and a good approach to the business, even the worst case scenario can bring opportunities and make you better".

As Europe enters into phase two of lockdown, the outlook is a lot less gloomy than back in March. The biggest difference is that major sports leagues across the continent will continue, and while the sector has other verticals to fall back on, sports betting has certainly been welcomed back by affiliates with open arms.

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ESPORTS: SEIZING THE DAY WHILE OTHERS STUMBLE

Peter Lynch reviews the unstoppable growth of esports in what has been an unpredictable year for the entire gaming industry

The ongoing COVID-19 pandemic continues to devastate many sectors, with the gambling industry certainly no exception. Lockdowns, social distancing and limited capacity measures have all played their part in ensuring that land-based casino operations have taken a hard hit. But that hasn't been the case for online, with the vertical witnessing huge rises in revenue as the year has progressed.

Another area that has flourished instead of floundered in the current climate is esports. Many traditional sports fans and indeed the wider public may be forgiven for thinking that this world of participating and watching others participate in gaming events may have been a temporary fling, but the latest statistics show that esports are here to stay. Perhaps it's even poised to overtake traditional sports one day, but that is another debate entirely.

Esports boasts titles involving traditional, physical sports, with Fifa and NBA2K representing football and basketball respectively, but much of its success has come in titles such as League of Legends and Fortnite.

That success must be taken into context, however, particularly in a year filled with inconsistencies and anomalies caused by the pandemic. Yes, esports has been growing exponentially for several years now, but those within the industry will be well aware that revenue and audience statistics for 2020 can only be measured by considering just how much action from sports and esports there was available.

But take nothing away from the efforts made by esports companies

throughout the lockdowns imposed across the globe, with the industry bravely stepping forward when the sporting action was brought to an abrupt halt due to the pandemic.

It was a seemingly ingenious decision, with Gambling Commission statistics from the biggest operators, covering 80% of the online gambling market in the UK, showing that the vertical's yield increased from £50,223 (\$68,000) in March 2019 to £4.6m in May 2020.

Several reports now place esports revenue at over \$1bn, with North America and Asia representing its two largest markets; China itself accounts for almost one fifth of the entire market. It's certainly difficult to identify just one metric that has helped bring about such success, with a combination of factors key to building up this impressive total in recent years.

It can, however, be slightly narrowed down to three crucial components, with peak viewership, average viewership and hours watched all helpful when determining exactly where esports has benefitted most.

Esports has been no stranger to online events over the years, but 2020 has forced the majority of the action to be hosted online, as opposed to the hugely popular events that have taken place live and in different venues across the globe. The unfortunate circumstances have resulted in fewer competitions taking place, but even that hasn't stopped gamers from spending more time than ever before on streaming platforms.

Casual viewer numbers have risen from 245 million to 272 million from 2019 to 2020, with enthusiasts climbing from 198 million to 223 million. Add those totals together and the figure stands at almost half a billion esports followers. Gaming market insight and analysis group Newzoo predicts that number will climb to 646 million by 2023.

Such viewing figures have undoubtedly been helped massively by accessible viewing platforms, most notably YouTube and Twitch, with the latter really coming into its own in the past 12 months. Live streaming software company Streamlabs highlighted just how popular those platforms are in their Q3 2020 reports, which showed that Twitch represented 91% of the market share for hours streamed, with YouTube Gaming having a market share of 6%.

Even Facebook Gaming is getting in on the act with 3%. The three platforms combined to boast a total of 7.46bn hours of gaming watched, with Facebook Gaming exceeding 1bn hours watched for the very first time. That total represented a stunning 92% year-on-year increase.

Just like 2019, 2018, 2017, and quite simply every year in its brief existence, esports has thrived in 2020, despite the circumstances. Whether it can grow even bigger in 2021 remains to be seen, but current trends show it is a vertical with huge potential, particularly as the world turns increasingly digital.

“ESPORTS HAS BEEN NO STRANGER TO ONLINE EVENTS OVER THE YEARS, BUT 2020 HAS FORCED THE MAJORITY OF THE ACTION TO BE HOSTED ONLINE, AS OPPOSED TO THE HUGELY-POPULAR EVENTS THAT HAVE TAKEN PLACE LIVE AND IN DIFFERENT VENUES ACROSS THE GLOBE. THE UNFORTUNATE CIRCUMSTANCES HAVE RESULTED IN FEWER COMPETITIONS TAKING PLACE, BUT EVEN THAT HASN'T STOPPED GAMERS FROM SPENDING MORE TIME THAN EVER BEFORE ON STREAMING PLATFORMS”



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ONLINE CASINO: THE ONLY WAY IS UP

Tim Poole reviews a strong year for online casino operators and affiliates, a time this sector will look back on very differently compared to many others



Here, Atemi COO Manuel Berndörfler specifically credited the success of the affiliate's online casino performance: "Despite the lack of sport, our business has continued to demonstrate strong organic growth. Operators were moving their advertising budgets away from sports and into casino during the quarter. Casino has proven a much better investment opportunity than sports over the past six months." Atemi founder Richard Skelhorn added: "Recent months have certainly had a huge impact on sports affiliation and we were rewarded for our ratio of casino to sports business."

Elsewhere, total online gaming was also up 17% for Q3 in the French market, of which casino played a significant part. In *Trafficology* November, meanwhile, Shahar Attias wrote that conversion rates are this year at new heights, from about 35% to around 45% in the US, and from 40%-45% to 50%-55% in the UK. Online gaming in New Jersey and other US states has simply soared and, generally, all roads have led to Rome in the gaming industry – with the sector's Rome undoubtedly being online casino.

Of course, even during a record year, achieving perfection is a tall order. Catena Media was only able to report a 2% fall in annual casino revenue (to €16m) and there were areas of online casino that did suffer in 2020. Sweden's re-regulated market was already witnessing tension between operators and its regulator heading into its second year, along with a considerable decrease in channelisation. The coronavirus pandemic added to this burden as the Swedish Government imposed new COVID-19 restrictions, including an SEK 5,000 (\$436.75) weekly deposit limit and SEK 500 bonus offer limit. These measures may continue into 2021 and were noted in operator LeoVegas' Q3 report.

Building on that point, LeoVegas CMO Dersim Sylwan told *Gambling Insider* in November: "The effect of the recent measures and limitations has been even lower channelisation within casino. One key issue is that problem gamblers in Sweden, who have suspended themselves from playing via the central self exclusion system, have been able to continue playing with the unlicensed gaming companies where there is no consumer protection."

Overall, however, this year has provided a clear yet unexpected surge for both online casino operators and affiliates. While online poker and esports have benefited from the circumstances created by the coronavirus, and sports betting endured a huge drop at earlier stages this year, online casino has excelled both with greater volumes of retention and a huge uplift in customer acquisition. Although 2020 will be remembered as the year of COVID-19 the world over, for digital gaming sites, 2020 will always mark a year of smashed records. And if gaming has an unequivocal winner during this pandemic, it's definitely online casino.

2020 will understandably be remembered by many as a year hopefully never to be repeated. But while this remains true for the offline casino industry, affiliates and online operators will not forget 2020 for very different reasons. Indeed, as populations around the globe were left homebound seeking a greater level of entertainment options, online casino companies suddenly faced unheralded levels of new demand. While some brands and affiliates took advantage with unscrupulous marketing, others were more cautious, with certain operators even cutting ties with any affiliates who unfairly capitalised on COVID-19.

Whatever the response, though, and whatever the approach, the fact remains more money was wagered in the online casino sector over the past 12 months than ever before. Record results for numerous companies demonstrated that the only way is up, with live casino booming in particular. The vertical's chief supplier, Evolution, reported Q3 operating revenue of €140m (\$166.6m), a 48% rise year-on-year, and revenue of €383.5m for January through September (also a 48% yearly rise). Meanwhile, on the operating side, Betsson AB generated group revenue of SEK 1.68bn (\$200m), an increase of 31% and an organic increase of 27%. For casino only, this revenue was SEK 1.3bn for Q3, up 39%, and SEK 3.6bn for January through September (up 26%).

Beyond suppliers and operators, affiliates themselves didn't do too badly either. 2020 was a breakout year for Atemi Group, in particular, which was rewarded as fellow affiliate Better Collective purchased the brand for €44m in October. The acquisition came off the back of a 72% year-on-year increase in new depositing customers for Q3 and \$13.3m in Q3 revenue, a 42% quarter-on-quarter rise from Q2.

THE POWER OF POTENTIAL

Robert Peters, CEO at slotpartners.com, discusses a big step in broadening its portfolio, as well as options for consumers

Tell us about the new brand you are launching.

We just added Whamoo (Whamoo.com) to our Slotpartners affiliate portfolio. This is our first cooperation with a newly started regulated company in Malta, which created Whamoo.

Until now we've only worked with Curaçao and Hungary-licensed companies at Slotpartners, but with this brand we've added our first MGA-licensed brand. We expect a lot from it because it has all the ingredients to become a big success. It was built on a new platform equipped to operate in multiple jurisdictions and therefore will add licenses from several other jurisdictions in the next year.

Also Whamoo is aimed at a different audience than our other brands. Currently our brands are online casinos created and developed by 50-year-olds. For Whamoo, it was decided to focus on a younger audience, primarily Millennials and Gen Zs, who are over 18 of course, so they involved a young, smart, recently graduated team to target that niche. It was a team from the recently established Full Force Gaming Group who created this casino and I have to say they succeeded very well, and I am very enthusiastic about the outcome.

The team behind Whamoo has created a warmer, more engaging, fun brand that encourages players to interact more with the casino as well as each other. It also offers promotions that are catered more to their personal needs. A perfect example is the Welcombo, a welcome package players get with their first deposit. Instead of just giving them a bonus and free spins, Whamoo lets the players decide what they would like to have. This casino's new approach is more about adding value and engagement, rather than just offering great bonus and free spins promotions - which they also do, by the way.

Also, Whamoo hosts a lot more smaller and larger tournaments and raffles. Some will last for an hour, some will last all month. These extras will make spending time at Whamoo even more fun and cause an increase in player value. On the other hand we want our players to enjoy Whamoo responsibly. Therefore Whamoo offers various tools for players to control their gambling behavior on the website. It makes for a safer player environment. It also ensures Whamoo can stand the test of time and face the most stringent regulations for the coming years.

What markets are you targeting with the new brand?

We will target all areas Whamoo's license allows us to target. These days that's a bit of a blurry topic since regulations are kicking in fast all over the world. The loopholes of unregulated markets are closing and we expect that regulated is the way to go. For this we've also improved our own organisation; we became ISO certified and we implemented new procedures and strict AML and KYC rules. We're also putting more emphasis than ever on responsible gaming. With the help of consultants we flew in, we've trained and prepared our staff for the new era.

What kind of growth are you looking to achieve with the brand in 2021?

I expect a lot of it due to several reasons. Our affiliates ask us on a daily



ROBERT PETERS

basis when we will offer new brands because they trust the quality of our products. We strategically retrieved from some countries due to regulations and therefore affiliates are keen to send in fresh traffic to us. 2020 was the first year that we didn't double our numbers, so this year I expect us to double again just like all the years before. Also we have more brands in the pipeline, which will help us reach that goal. Our revenues in Hungary are going up steady as we are one of only two regulated casinos in that country. So all in all it will be an exciting year for Slotpartners.

It's been a year like no other. How does Slotpartners reflect on 2020?

It's been an interesting year to say the least. For us as an affiliate network not being able to meet affiliates in person was a huge miss. We always like to stay in touch personally, and being able to speak face to face always adds to that personal experience. Also, not being able to physically attend events meant we couldn't reach out to new affiliates the way we're used to. That meant finding new ways to find and attract new affiliates, which I can safely say we managed to handle quite well.

On the brand side we saw an increase in interest in our products due to more people staying at and working from home. On the other hand we saw authorities enforcing stricter rules. The latter posed some extra challenges for us, but was nothing we couldn't handle. Far more interesting than 2020 will be 2021. We're not stopping at Whamoo. There are a lot more projects in the pipeline that will be developed in the upcoming year using our new, state-of-the-art platform. More brands, more variation, and more focus on responsible gaming. We're very confident that with Whamoo added to our portfolio, we have a solid mix ready to take on the markets in the upcoming decade.

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PLAY HARD



DOLAN BEUTHIN

Dolan Beuthin, CEO and co-founder at BetMonsta and **Martin Sack**, a consultant for the South African operator, discuss with Iqbal Johal their biggest lessons learned during lockdown, and which South African sportsman they'd invite around for dinner

WHAT'S BEEN THE BIGGEST THING YOU'VE MISSED DURING THE LOCKDOWN PERIOD?

Dolan Beuthin: The thing I missed most during lockdown was being able to travel, both locally and internationally, and to visit restaurants, be with friends and socialise.

AND WHAT'S THE BIGGEST LESSON YOU'VE LEARNED DURING LOCKDOWN?

Martin Sack: It gave me a gift that parents of older children don't have that much, which is I had my children around me for months. Just the ability to build that connection while the rest of the world was going to hell was an amazing thing and I feel privileged for that. The importance of family is the main thing I took from this period.

SOUTH AFRICA IS FAMOUS FOR ITS SPORT. WHAT'S YOUR FAVOURITE AND WHY?

DB: If it was to play, it's golf as I'm out there all alone and rely on myself and my own ability. If it was to watch as a spectator sport, it's got to be rugby union. It's fast moving, brawn and brains combined together and very exciting with the score able to change at any moment.

MS: My favourite sport would be karate for the sake of doing it and for watching it would be rugby, which is absolutely amazing. Definitely not golf which leaves me too cold.

IF YOU COULD PICK ANY SOUTH AFRICAN SPORTSMAN OR WOMAN FROM HISTORY TO INVITE ROUND FOR DINNER, WHO WOULD YOU CHOOSE?

MS: I'm going to go with cricket on this one, I would invite former South Africa captain, the late Hansie Cronje round and say, "Hansie, what the hell were you thinking? Now explain that to me over a bottle of whiskey!"

DB: My choice would without a doubt be Gary Player. He's the most impressive South African sportsman we've ever had.

AS GAMING INDUSTRY VETERANS, WHAT'S BEEN THE MOST EXCITING CHANGE IN THE SECTOR THROUGHOUT YOUR TIME?

DB: I've seen such dramatic changes over the 40 years but they've all been driven by technology. Everything was manual when I started. We had to control everything manually such as the cash, bets and odds. In that aspect it's been such a drastic change, and whoever was involved then is almost lost in today's technology driven world.

MS: This isn't the easiest question to answer because the one thing that defines our industry is change. If I had to choose one thing, I'd have to say the move to mobile, which was probably a watershed moment to the way we sell and do things in our business.

WHAT'S THE BEST BET YOU'VE EVER PLACED?

DB: I haven't placed a bet for quite a while but the best bet I made was the first massive bet I placed on Tiger Woods to win his first Masters in 1997 when almost everyone thought it wasn't possible for a kid, but obviously we all know what happened. He set the world on fire.

WHAT'S YOUR FAVOURITE PLACE TO VISIT IN SOUTH AFRICA?

DB: For me it would have to be Cape Town. It's got everything, it's very European-like as a destination. When the weather is good it's phenomenal. The food and hotels are great and it's a magnificent place.

MS: Personally, I prefer the smaller towns in the KwaZulu-Natal coast, like Ramsgate. It's a quiet, sleepy seaside village where I can just relax by the ocean.

IF YOU COULD CHOOSE ONE SPORTING VENUE TO VISIT IN THE WORLD THAT YOU HAVEN'T BEEN TO, WHERE WOULD YOU GO AND WHY?

DB: That would have to be the Masters Golf tournament for obvious reasons as a golf lover, although getting tickets is nearly impossible. I would really love to be on the course just once to see the top players play.

MS: If I had to pick one that I haven't done, I'd love to go to Wimbledon for the tennis Championships, especially on Centre Court where you'd be so close to everything.



MARTIN SACK

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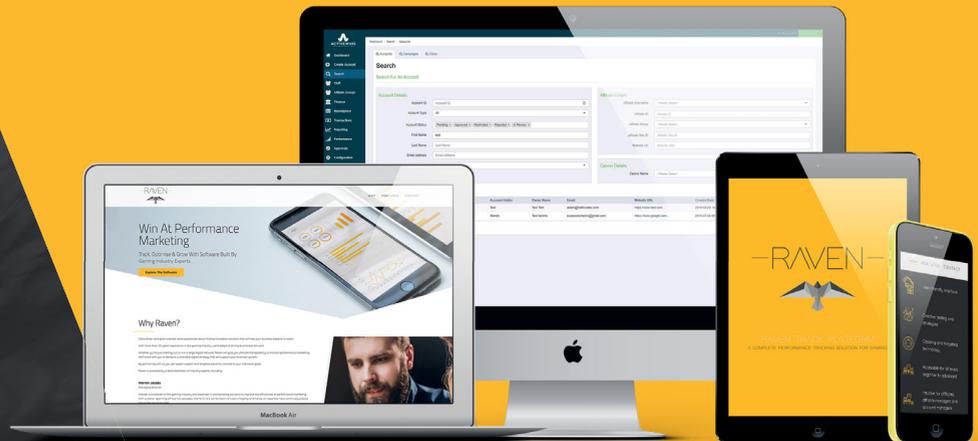
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