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Marketing & affiliate focus by *Gambling Insider*

DECEMBER 2021

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DECEMBER 2021

PLAYING FAIR

Trafficology exclusively interviews industry legend Bryan Bailey

INSIDE:
Industry data from SponsorUnited and Time2Play

Q&A: MediaTroopers

Bestodds.com:
challenges in the US

Play Hard: Rebecca Ciala

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TRAFFIC REPORT

Trafficology has partnered with data expert Casino City Press, to provide insight into website and traffic trends across affiliate industries – predominantly in gaming but including others. In this edition, we review affiliate programmes per vertical for October 2021. The below is a breakdown of the top 10 sites globally, including both desktop and mobile, sorted by: overall ranking, casino ranking, sports betting ranking, poker ranking, lottery ranking and financial ranking



OVERALL

Rank	Name	Website
1	bet365 Partners	www.bet365partners.com
2	Yahoo Fantasy Sports Affiliates	sports.yahoo.com/daily-fantasy/affiliates
3	TrafficOn	trafficon.io
4	NetHive Affiliate Program	www.nethive.com
5	eToro Partners	www.etoropartners.com
6	Best Partners	www.bestpartners.com
7	Bovada Affiliate Program	www.bovada.lv/new-bovada-affiliate-program
8	betway Partners Africa	www.betwaypartner-safrica.com
9	Entain Partners	www.entainpartners.com
10	DraftKings Affiliates	www.draftkings.com/affiliates

CASINO

Rank	Name	Website
1	Gamesys Group Partners	www.gamesysgroup-partners.com
2	WinBet Affiliates	winbetaffiliates.bg
3	TrafficOn	trafficon.io
4	LeoVegas Affiliate	www.leovegasaffiliates.com
5	Stakes Affiliates	affiliates.stakes.com
6	Platin Casino Affiliates	partners.platincasino.com
7	Buffalo Partners	www.buffalopartners.com
8	William Hill Affiliates	affiliates.williamhill.com
9	PlayAmo Partners	playamopartners.com
10	Betsson Group Affiliates	www.betssongroup-affiliates.com

SPORTS BETTING

Rank	Name	Website
1	bet365 Partners	www.bet365partners.com
2	NetHive Affiliate Program	www.nethive.com
3	Best Partners	www.bestpartners.com
4	Bovada Affiliate Program	www.bovada.lv/new-bovada-affiliate-program
5	betway Partners Africa	www.betwaypartner-safrica.com
6	Entain Partners	www.entainpartners.com
7	Betway Partners	www.betwaypartners.com
8	Betfair Partnerships	partnerships.betfair.com
9	Stoiximan.gr Affiliates	affiliates.betano.com
10	Bet9ja Affiliates	affiliates.bet9ja.com

LOTTERY

Rank	Name	Website
1	FDJ Affiliate Program	www.fdj.fr
2	Lottoland Affiliates	www.lottolandaffiliates.com
3	Michigan Lottery Affiliates	playonline.michigan-lottery.com/affiliate
4	LottoStar Affiliate Programme	lottostar.co.za/affiliate
5	West Lotto Partners	www.westlotto.de/unternehmen/affiliate/partnerprogramm.html
6	The Lotter Affiliates	www.thelotter-affiliates.com
7	Affiliate Empire	www.lottogoaffiliates.com
8	MegaRush Affiliates	megarushaffiliates.com
9	LottaRewards	www.lottarewards.com
10	PA iLottery Affiliate Program	www.pailottery.com/p/partners

POKER

Rank	Name	Website
1	Stars Affiliate Club	www.starsaffiliateclub.com
2	WPN Affiliates	www.wpnaffiliates.com
3	Winamax Affiliates	www.winamax.fr/en/affiliates
4	U-affiliates	www.uffiliates.com
5	Entain Partners	www.entainpartners.com
6	CommissionKings	www.commissionkings.ag
7	bet365 Partners	www.bet365partners.com
8	GGPartners	en.ggpoker.com/partners/affiliate-program/
9	The Spartan Poker Affiliate Program	www.thespartanpoker.com/affiliate/overview.html
10	Intertops Affiliate	affiliate.intertops.eu

FINANCIAL

Rank	Name	Website
1	eToro Partners	www.eturpartners.com
2	TrafficOn	trafficon.io
3	IG Markets Partners	www.ig.com/uk/marketing-partnership
4	Exness Partner	www.exnessaffiliates.com
5	XM Partners	partners.xm.com
6	BinPartner	binpartner.com
7	Deriv Partners	deriv.com/partners/
8	Binary.com Affiliate Program	www.binary.com/en/affiliate-ib.html
9	IQ Option Affiliate	affiliate.iqoption.com
10	IC Markets Affiliate Program	www.icmarketspartners.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.



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MOST SEARCHED

1-10



11-20



1,600% ↑

YOY sponsorship increase; currently 17 deals within 14 leagues

64%

of deals include social media; TOM BRADY holds highest engagement

3

Jersey Patch deals, 2 primary and 1 Jersey Sleeve Logo

4

Athlete endorsements within the NBA and NFL

2

Naming Rights deals with the MIAMI HEAT and UC BERKLEY

4

Sponsorship deals with ESPORTS ORGANIZATIONS within 3 leagues



crypto.com

300% ↑

YOY sponsorship increase; currently 8 deals within 7 leagues

44%

of deals include social media; F1 holds highest engagement

3

Jersey Patch deals, 2 primary and 1 Practice Jersey Patch

NFT

SERIE A partnership NFT of Championship Trophy

2

Sponsorship deals with FORMULA 1

TOP ASSETS BOUGHT

*Cryptocurrency Overall

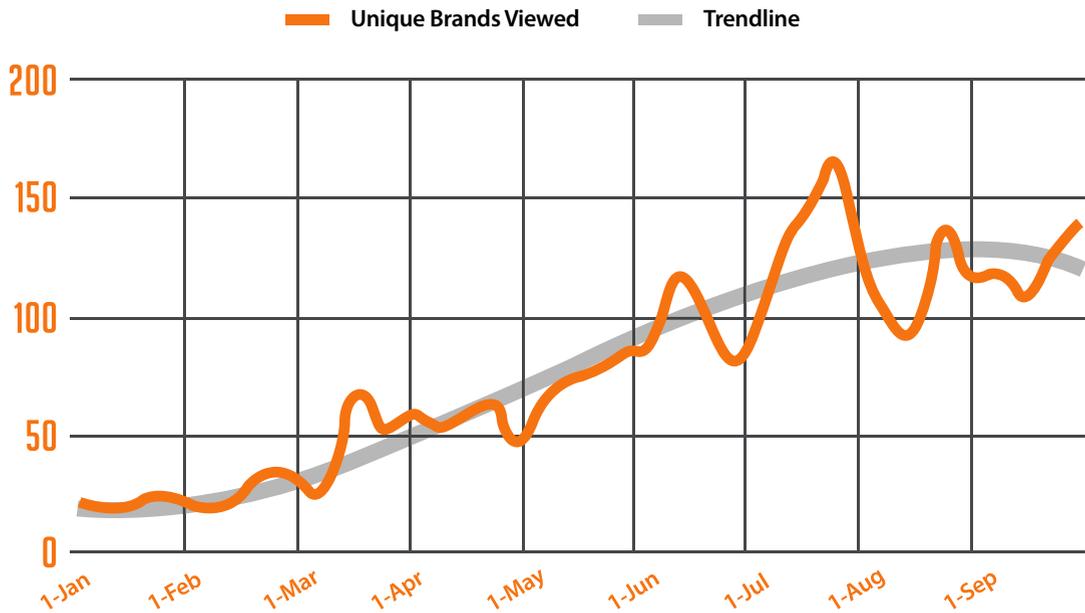


MOST ENGAGED SOCIAL POST

Engagement Score:



CRYPTOCURRENCY SEARCH TREND 2021



SPORTS BETTING



MOST SEARCHED

1-10



11-20



BETMGM

56% ↑

YOY sponsorship increase; currently 78 deals within 29 leagues

165% ↑

YOY sponsorship increase; currently 53 deals within 18 leagues

77%

of total sponsorships DO NOT INCLUDE NFL, MLS, MLB, NBA, or NHL

72%

of sponsorships INCLUDE NFL, MLS, MLB, NBA, or NHL

42%

of sponsorships include EVENT CONTENT/ACTIVATION

55%

of sponsorships include DIGITAL CONTENT

37%

of deals include social media; CONOR MCGREGOR holds highest engagement

32%

of deals include social media; JAMIE FOXX holds highest engagement

260

Total deals

144

Total deals

53

Leagues/associations

32

Leagues/associations

TOP ASSETS BOUGHT

*Sports Betting Overall

35%

Social Posts

34%

Property Entitlements

26%

Digital Content

22%

Television Ads

21%

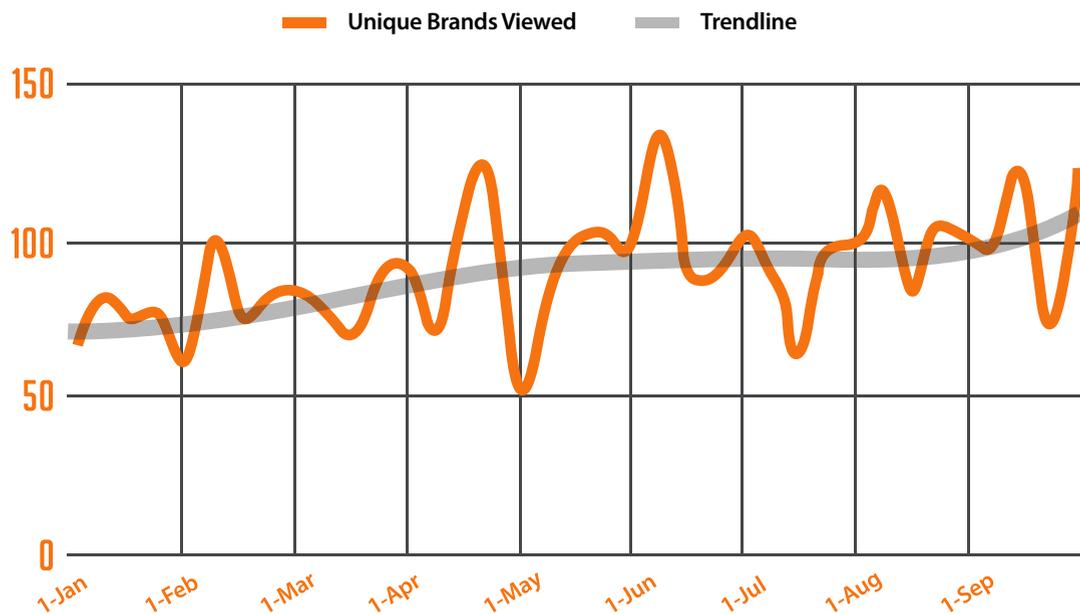
TV-Visible Signage

MOST ENGAGED SOCIAL POST

Engagement Score:



SPORTS BETTING CATEGORY SEARCH TREND 2021



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TIME2PLAY

Kafe Rocks Group-owned Time2Play walks Trafficology through the best-performing Twitch gambling streamers

The Top 10 Twitch slot streamers by hourly rate

	Twitch Channel	Hour Streamed	Income by Hour (\$)	Hours at Min Wage
1	Trainwreckstv	2,049	1,213.01	167.31
2	ROSHTEIN	2,894	860.08	118.63
3	Yassuo	1,442	796.87	109.91
4	Teuf	985	379.40	52.33
5	DeuceAce	1,593	345.78	47.69
6	VonDice	1,674	305.03	42.07
7	Xposed	1,735	304.06	41.94
8	Ruben	1,108	236.35	32.60
9	ClassyBeef	4,852	192.66	26.57
10	CasinoDaddy	4,608	66.07	9.11

The Top 10 Twitch slot streamers by yearly income

	Twitch Channel	Followers	Ave. Monthly Earnings (\$)	Ave. Monthly Sponsorship(\$)	Total Yearly Income (\$)
1	ROSHTEIN	806,670	39,043	48,803	2,489,082
2	Trainwreckstv	1,595,538	39,680	49,599	2,485,452
3	Yassuo	2,024,054	19,223	24,029	1,149,088
4	ClassyBeef	203,844	14,702	18,378	934,800
5	DeuceAce	182,409	8,692	10,864	550,820
6	Xposed	410,319	8,502	10,628	527,553
7	VonDice	170,444	8,090	10,112	510,614
8	Teuf	233,518	5,635	7,044	373,709
9	CasinoDaddy	160,957	5,001	6,251	304,446
10	Ruben	203,592	3,122	11,985	261,881



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FREEPLAY: THE KEY QUALITIES

Daniel Kustelski, Co-founder and CEO of Chalkline, shares four ways in which operators can maximise the potential of freeplay content

Since the skyrocketing success of Sky Sports' Super 6 (and all the successful games before it), freeplay games have been a central acquisition and retention tool for operators around the world.

Face it, every bettor can't bet every day or week, so how can operators keep them engaged, educated and entertained when they're not betting? The answer is simple: freeplay games.

But leveraging freeplay content is not without its challenges. Below, I share four key characteristics of the most effective freeplay sports game programs.

1. EDUCATE AND ACCLIMATE NEW BETTORS

For new bettors, sports betting can be intimidating and complicated. Especially in the US market, you have to assume that your new customers aren't familiar with betting concepts and terminology.

Working in gaming, I hear these questions all the time: what is a money line? What's a half-time total? To help with this learning curve, education is key.

Casinos educate players all the time for table games like craps and roulette, because it's fun for customers and good for business.

Especially with your VIPs, providing new betting experiences (in-play, anyone?) in a freeplay setting will give players a risk-free chance to experience their favourite sporting event in a new way.

The best freeplay programs empower players to learn. For example, you can incorporate tips, instructions and definitions into your freeplay games, and let new bettors learn at their own pace.

Nearly 20% of all freeplay players on our platform engage with helpful information: 'How to Play' pages, FAQs or tool tips. Meet players in their comfort zone, and it'll create a much better experience for your customers.

2. LOCALISE AND PERSONALISE

Sports bettors come in all shapes, sizes and experience levels. To deliver great betting experiences, whether real money or freeplay, you must understand what your bettors like – their

favourite teams, their favourite players, their familiarity with certain bet types – these are the characteristics that make bettors tick. Operators benefit greatly from building personalisation in your freeplay games.

Start with localisation, offering games based around teams in your bettors' geographical area. After that, track their freeplay game behaviour to see which teams, leagues and athletes they like to engage with.

With this data, you can craft more personalised experiences – and have a better shot at engaging and retaining players in the long term.

There's a lot of noise in the market right now.

The more you localise and personalise your freeplay games, the more likely you are to deliver relevant campaigns that speak to your bettors' passion points, habits, and preferences, setting you up for more long-term revenue opportunities.

3. EASILY INTEGRATE WITH YOUR MARKETING TECH

As an operator, your teams spend a lot of time building customer journeys or cultivation flows. The best freeplay sports games will integrate into those journeys and feed customer data into your marketing stack in real time.

It can start with Single Sign On, so that freeplay games essentially become a player's first step towards registration and a deposit. Or, it can be a real-time update to your CRM so that you can convert the player around a big betting event.

If you're a casino with a loyalty program, a freeplay sports game can provide a highly engaging experience for VIPs to earn (or burn) loyalty points around their favourite team or sport.

4. BUILD ACTIONABLE DATA PROFILES FOR CONVERSIONS AND CROSS-SELLS

Freeplay games can help you understand your players and get them to the next right step.

If you're a casino with uncarded players watching The Big Game in your sports bar, a QR code or digital signage can easily convert those players into an email address or mobile number.

And once you convert them, those freeplay player segments can inform your strategies and tactics for a range of player personas.



DANIEL KUSTELSKI

PLAYING FAIR

Affiliate legend **Bryan Bailey**, Founder of Casinomeister, speaks to **Tim Poole** about a career spanning more than two decades



WELCOME BRYAN, WE'RE EXCITED TO TALK THROUGH YOUR 23 YEARS OF BEING IN THE BUSINESS. BUT FIRST OF ALL, WHAT'S IT LIKE BEING BACK AT INDUSTRY EVENTS AND AFFILIATE TRADE SHOWS?

It's good but a little bit strange because I'm not used to being around massive crowds anymore. I've just been avoiding them. Covid has affected my lifestyle a bit. I've been quarantined 17 times so far and half of those were in the UK. So I've become accustomed to this mode of avoiding people, avoiding crowds and everything.

Going to SIGMA was a little crazy. You could tell people were relieved not to be dealing with Covid, but Covid doesn't care. It's still here, and right now, I'm hearing about quite a few people getting it. It's still widespread. I felt semi-comfortable because I'm vaccinated. I got my booster right before the conference. But still, I was one of the few people walking around with a mask on.

Being at SIGMA was interesting. For a lot of people, being at conferences is their job; it's what they've been dying to do, and they've been cut off from that for the last 18 months. And I also came to realise that I do really enjoy going to the conferences.

I WANT TO GO FOCUS IN ON YOUR POINT ABOUT HAVING TO QUARANTINE AND ISOLATE DURING COVID. I KNOW YOU HAVE A BEAUTIFUL RANCH IN CALIFORNIA; WHAT'S IT LIKE BEING OUT THERE?

The Monkey Flower Ranch. It's set up for rental now, but I've been working on this for quite a few years. When Covid happened, it was like, "there you go, let's go out there and spend some time." The ranch itself is in the southern tip of the Sequoia National Forest. If you look at a map and look at where Vegas and LA are, it's in the middle — but a little bit north. It's in the High Desert area in Weldon, Kern County.

The stars at night will blow your mind. There are remnants of the indigenous tribes, who lived out there for thousands of years. You can see these rocks they used for grinding stones and there's an old Indian cave hidden up in the hills with petroglyphs. It's really cool. Except, it's in Kern County, which is like 'Trump Land'. You walk into stores, and no one's got masks on, and they're looking at you like: "I ain't afraid of no beer flu! What you wearing a mask for?"

APART FROM THAT LAST BIT, IT SOUNDS LIKE AN AMAZING PLACE TO BE! COULD YOU WALK US THROUGH YOUR CAREER, FROM YOUR EARLY DAYS IN THE AFFILIATE INDUSTRY TO WHERE YOU ARE NOW?

When I first started the site there were really no affiliates. It started as a hobby site back when I lived in San Diego. I was a commercial fisherman in Alaska for a bit, and then I joined the military. When I got out, I couldn't find work. I ended up going back to Alaska and then coming back down again before deciding to go back to university. So I went to San Diego State University and banged out a BA in English, and then went on to do the Master of Fine Arts (MFA) Creative Writing program.

This was when the internet was first starting to kick off. It was like mid-'94, '95: around then. One of the projects I had was trying to teach a short story using your computer, or using the internet — using HTML. So I started doing that, teaching short stories like William Faulkner's *Rose for Emily*. This was where I started learning HTML, all on my own. I still have my handbook.

I was doing this, and I ended up working for a company that was translating websites. I was in charge of doing the HTML, because I could work with graphics, I could take them apart, match fonts — all this stuff that nobody was doing back then — and we started translating these casino sites. This was in '97, '98. I'm looking at it and all these online casinos were based in the Dominican Republic or Curaçao or

Antigua, and I'm like: "Who in their right mind would give these guys their credit card number and play blackjack or something?"

Anyway, we translated the websites, but some of them didn't pay us so I thought it was just a joke. At this point, we were contacted by some of the owners of a land-based casino in San Diego County, and they wanted to start up their own online casino. But they were afraid that people wouldn't be able to tell the difference between their site and a casino that was in one of these fly-by-nights in the Caribbean. We were in a meeting and I'm thinking, you know what, I can make a website. It would have a list of good casinos, like your casino, and bad casinos, like these guys that didn't pay us.

SO CASINOMEISTER WAS BORN...

I figured I could call it Casinomeister, because I was planning on going back to Germany anyway. I started it in June 1998, uploaded the pages and had tips and tricks of online casinos and stuff. But I didn't have a clue what I was talking about. So I figured, how could I find out what this is all about? I know, I'll start a forum. People will go to the forum, I ask them questions, and they can post their answers. So there you go. I got my content.

It was amazing to watch traffic come in because you had these little scripts that could show you how many people were on your website. We'd have like maybe 15 or 20 people and that

was crazy because it was the early days of the internet. When you had people coming from Washington State, or Canada, or Europe or Asia, it was magical in a way. But Casinomeister didn't really kick off until I went back to Europe.

This was in 1999, 2000. I was writing a newsletter, sending it out every week, and a friend of mine talked me into going to the first conference. This was, as I mentioned, in January 2001. So I thought, okay, cool, London's not far from Germany. When I went to the online casino section of the conference area, everybody knew me. They were all subscribing to my newsletter. The CEOs of different companies and all that sort of thing. That's when I started making some of my contacts and that's what really built up the whole trust bit about the site, about Casinomeister.

For the first year or so, I had a couple of banners on the site, but a lot of banners weren't even monetised, I was just showing you where you can play. It wasn't until I became jobless in Germany in 2000 that I needed to start making money. I thought maybe you can make money off this, and that's when some affiliate managers and marketing people contacted me to say "oh, yeah, put a banner up on your site. We'll give you 5% revenue share." I'm going yeah: 5%! That's great." There are times when you're kind of easy, but it's not like that anymore.

IS IT FAIR TO SAY YOU ACCIDENTALLY ENDED UP BEING AN AFFILIATE?

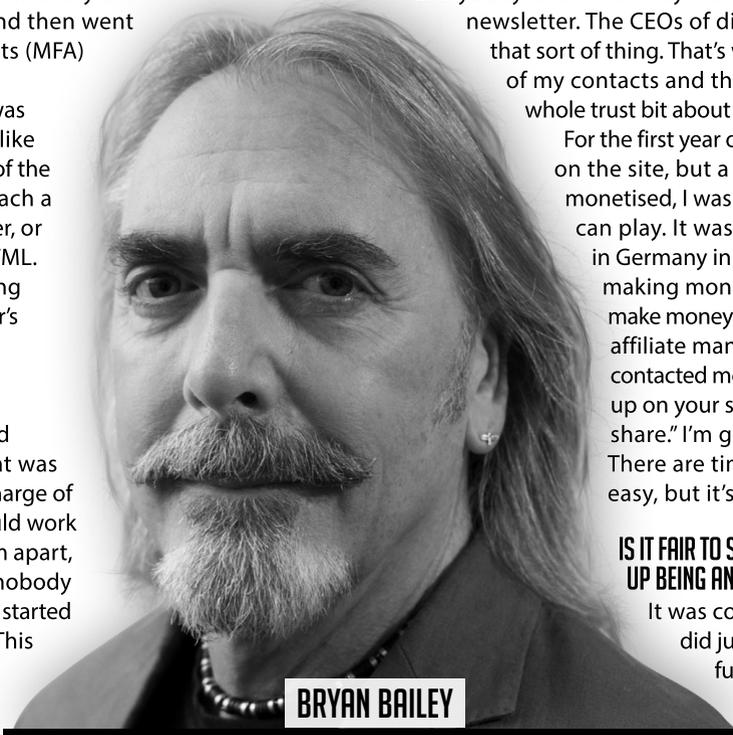
It was completely serendipitous. I did just kind of fall into it. Which is funny because my background, my writing and everything, is really in short stories and screenwriting.

My understudy for my MFA was screenwriting. I had started up another website called *secondact.com*, but it was mirroring Casinomeister. It was set up in the same way. I used the same templates; I was using the same ideas. You went to the forum, and you talked about writing projects. I had writing tips and everything. But I knew that stuff, so I didn't have to try and figure out what's going on.

I wasn't a gambler. I'd been to Las Vegas once, just to go — to find a cheap buffet. That was it. So it was quite serendipitous. I was in Germany, I had my wife and two kids; I was unemployed. I moved there because the translation company was opening up a European office, and after two months, it was the dot.com boom. They basically said you're on your own now. I didn't speak German, or not much — enough to order a beer. So it's like they say: necessity is the mother of invention.

WHAT HAVE BEEN THE BIGGEST CHANGES IN THE AFFILIATE INDUSTRY IF YOU LOOK BACK OVER THE YEARS? ARE THERE ANY HIGH OR LOW POINTS THAT STAND OUT?

Well, the low point was when the US decided they owned the internet. They tried to shut everything down. They shut down all the poker, because they wanted to tell you what you can and can't do at home, even though you're playing on a licensed site that's elsewhere. It was all a big money grab. So that was back in 2005 and it was a big mess.



BRYAN BAILEY

Back in those early days, we had a lot of affiliates, and they were guys who were like a webmaster. They'd create a website with a great idea, and then go ahead and make some money. And it was a dream; it was an entrepreneur's dream back then.

But when the US decided that they owned the internet, it really shut down a lot of opportunities for all the American, US-based webmasters and you started seeing them trickle away. I don't know anybody in the States that's really focused on being an affiliate with online gambling, there may be a few here and there, but they're mostly gone. But on the other hand, when you see licensing jurisdictions getting involved and actually setting up real jurisdictions where these online casinos can function properly, it's kind of a good thing.

But still, it's gotten so bogged down right now, it's almost becoming a bane of the industry. You see it happening again, with the Gambling Commission (GC), with the Malta Gambling Authority (MGA) — they're all trying to outdo one another, trying to make everything all safe for gamblers to the point of people not wanting to play at these casinos anymore. Instead, they'll just go ahead and Google, "casinos that take UK players, not GC," and they end up on unregulated sites in the Caribbean.

I'd say the majority of these sites are just really, really nasty. They use fake games, they target players with gambling problems, and I have the screenshots to prove it. I did it last week. There was a casino that was taking UK players, so I went there with a UK IP and the first thing I told them was: "Hey, I'm banned from all the casinos in the UK because of gambling problems, can I sign up here?" And they go: "Yeah, sure." I go: "Great, that's good news for me, because I have a *GAMBLING PROBLEM*. What kind of bonuses can you give to me?"

In my opinion, licensing jurisdictions are responsible for the players, but every one of them — every single one of them — won't touch the player complaints. They're really just there to tax the casinos.

ONE OF THE ARGUMENTS ANTI-GAMBLING CRITICS OFTEN MAKE IS THAT THE REGULATED GAMBLING INDUSTRY IS JUST AS BAD AS THE BLACK MARKET. BUT FROM YOUR EXPERIENCE, THIS SOUNDS UNTRUE, AND THESE GUYS ARE TRULY "REALLY NASTY" AND WELL WORTH AVOIDING?

You can't avoid it. It's something you have to live with. We know these things, but players don't know. The first thing players do is go to Google, or whatever search engine they use, and type: "I want a 100% bonus." They don't care about licensing. We've done enough surveys on our forum. Old timer or veteran players know what they're looking for, they know how to spot a rogue casino, but the majority of players don't. They're not looking for licensing logos; they're not clicking through those and looking at the company.

But it's funny, because if you're going on vacation, and you're staying at a hotel, you do a search on Google to find out if they have any complaints, or you go to Tripadvisor to look at reviews — and then you make the decision. Most players that we find submitting complaints to our arbitration service never did that. They just go to Google; they see a site and click it.

I think people have forgotten what it was like when online casinos first started up. One of the best things about online

casinos was that you were anonymous. No one knew who you were, which was great, because a lot of people betting online don't want to go down to the local casino. They don't want their friends or family knowing that they're placing bets. But online, you can be whoever you want to be. This has been completely forgotten, but that was the whole thing back in the early days.

"THE LOW POINT WAS WHEN THE US DECIDED THEY OWNED THE INTERNET. THEY TRIED TO SHUT EVERYTHING DOWN. THEY SHUT DOWN ALL THE POKER, BECAUSE THEY WANTED TO TELL YOU WHAT YOU CAN AND CAN'T DO AT HOME, EVEN THOUGH YOU'RE PLAYING ON A LICENSED SITE THAT'S ELSEWHERE"



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“IT WAS AMAZING TO WATCH TRAFFIC COME IN BECAUSE YOU HAD THESE LITTLE SCRIPTS THAT COULD SHOW YOU HOW MANY PEOPLE WERE ON YOUR WEBSITE. WE’D HAVE LIKE MAYBE 15 OR 20 PEOPLE AND THAT WAS CRAZY BECAUSE IT WAS THE EARLY DAYS OF THE INTERNET. WHEN YOU HAD PEOPLE COMING FROM WASHINGTON STATE, OR CANADA, OR EUROPE OR ASIA, IT WAS MAGICAL IN A WAY”



THE 1990S - A SIMPLER TIME

RIGHT NOW, WHAT'S AT THE TOP OF THE AGENDA FOR BRYAN BAILEY AND CASINOMEISTER?

We're rewriting a lot of the content on the site and really focusing on the technical aspects of Casinomeister. It's an old site, going back 23 years. There's old content and old scripts, but we're starting to get it to the point where it's going to be flying pretty quickly. Our biggest competitors really are these Swedish teenagers. These young kids with SEO brains! They just go ahead and bang out all these sites, which is fine and dandy, because the main mission of Casinomeister has not changed. We're here to provide information for gamblers to make smart decisions.

Take a rogue casino like Bronze Casino, which is accepting UK bets and has mostly crooked software. If you go ahead and Google it, you'll have all these affiliates who are pushing this casino because they're getting paid good money. The casino can afford to pay good money because they're not paying licensing fees and not paying anything to anybody, no software providers, nothing. But they're getting bucket loads of players. This is still a real concern for us. It's important to have a viable site, one that means something to people because there's a lot of personality behind it.

There's my personality, the personalities of our staff and the personalities, mainly, of our community. We have the largest and most active player community online. So my plan really is to keep going steady and roll with the punches. We've had a few thrown at us, and we just roll with them. The whole US situation now, and more recent situations with affiliate stuff, and then player issues. My personal goal is to retire some day. I just hit 63 and I thought I was gonna hit 53 and be done with this! But I'm still having a pretty good time.

WHEN IT COMES TO THE FUTURE OF THE INDUSTRY, SAY 10 YEARS FROM NOW, CAN YOU ENVISION AN INDUSTRY THAT'S IN A BETTER PLACE; OR DO YOU FORESEE A LOT MORE OF THIS REGULATION BEING A BANE, AS YOU SAID, AND NOT REALLY ADDRESSING THE PROBLEM? ESSENTIALLY, WILL THINGS BE IN A GOOD OR A BAD PLACE?

It's kind of hard to say. Good for whom? For players, I think it's getting very problematic. I do have to give credit to the GC. They are doing a good job, but I think their biggest mistake is that they haven't really tried to understand players. They understand problem players because that's all they're focused on, but problem gamblers are a small minority of their players.

Of course, that's something you should always be concerned about, and on Casinomeister, we have sections about how you can quit gambling. If you're a member of the community and you're trying to quit, we have a way that you can log in and not see any gambling content. Going forward, though, it's tough to say because I'm seeing how things are going right now. You're losing a lot of the small affiliates. The industry is losing its personality. We had webmasters 10 years ago that were geniuses. These sites they'd set up were amazing. Ian Sims, for one, he had all of these really cool scripts where you could find certain casinos, but you don't see that anymore.

In the next 10 years, I think you're going to lose that ingenuity. You'll have William Hill, you'll have Betfred, all of the bigger brands will still be here because they're going to push all of the smaller brands out. You're just going to have your major brands who can handle a fine.

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LUCRATIVE IN DIFFERENT WAYS

US-facing affiliate **MediaTroopers** speaks to *Trafficology* about sports betting vs casino, M&A on the affiliate scene and goals for 2022

CAN YOU TELL US A BIT ABOUT YOUR COMPANY AND WHAT YOU WOULD SAY YOUR USP IS IN THIS EVER-GROWING MARKET?

MediaTroopers is a digital media marketing agency that specialises in the regulated US sports and casino markets. One of the most significant factors in our success is the amount of time we have spent in the industry. After entering the sector in the early 2000s, we have been involved in many regulated markets in Europe and beyond, and were involved in the UK market that grew into one of the largest markets in the world. Being able to take this knowledge and experience and translate this into the US market has been vital.

We work with the major US advertisers in the market and are the number one affiliate for most of them! MediaTroopers is a mobile-focused company. Coming into our fourth NFL season as a company, we know the importance of mobile apps and providing suitable offerings to app users.

Media Troopers is now licensed and operational in 16 states across the US, and we work in more states that have online gambling legalised but do not require a provider licence. As we love to focus on advertising and promoting our customers, we do not have our own gaming brands.

HOW MUCH OF YOUR FOCUS IS ON SPORTS BETTING, AND HOW MUCH CASINO?

We are very much involved in both sports betting and casino, but it really depends on the time of year. Our focus is greatly shifted by sports season, and when the NFL season starts, we concentrate on driving high-quality users in sports betting. Yet, later in the year, we switch our focus more to iGaming and the online casino market. This agility and wide range of expertise is something we feel gives us an advantage over other companies.

IN GENERAL, WHAT IS MOST LUCRATIVE FOR AFFILIATES? IS IT A CASE OF SPORTS BETTING HAVING FAR LOWER MARGINS BUT FAR MORE ENGAGEMENT AND OTHER BENEFITS?

As more states in the US are open to sports betting than online casino gambling, sports betting is by far more lucrative than casinos on a per player basis. But sports betting is seasonal. So we get crazy volumes during the regular season of the NBA, NFL, NHL, MLB, college sports and international sports like soccer etc. But the casino vertical is more steady and less susceptible to changes and seasons. It allows us to plan ahead of time. So both markets, in very different ways, are important and lucrative for us.

Since sports betting is also such a young market, it is hard to say what is most lucrative. However, it is essential that affiliates provide a great offering to potential players, including: a good product, user journey, branding, marketing, and customer service alike. Ultimately, the better the value proposition is for the player, the better it is for the affiliate.

HOW DO MEDIATROOPERS' METHODS DIFFER ACROSS DIFFERENT STATES?

Not all states have the same interest when it comes to casinos, sports and online gambling. While everyone loves the NFL, some states

may prefer college basketball, for example. Others may prefer college football. Others may prefer Nascar. Since each state is so varied, it is essential that we adjust our method from state to state to be fully dialled into each location. It is very interesting to see the exposure and following of sports teams in each state.

According to a recent study based on Google Trends and survey data, the NFL's Seattle Seahawks are the most popular sports team in Alaska, NHL's Las Vegas Golden Knights is the most followed team in Nevada, and NCAAF's Razorbacks are the most popular team in Arkansas. We follow data and research very closely and design the strategy and campaigns for every state in a different way that will target local audience. Understanding every market in detail is the key to success.

HOW DO YOU VIEW THE M&A SCENE IN US IGAMING AND ONLINE MARKETING AT THE MOMENT?

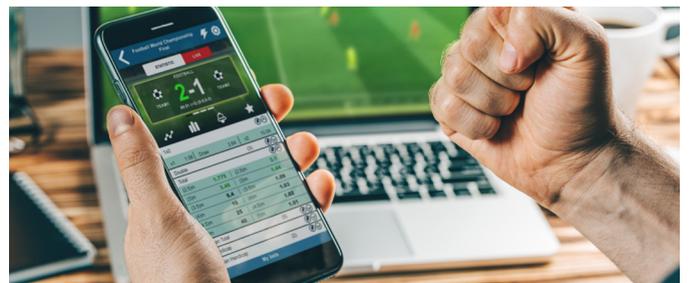
It's no surprise to us that the M&A scene is growing, as since Covid-19 and the start of the pandemic, online e-commerce and marketing firms have been booming. After being halted due to regulations, online sports betting, casinos, and iGaming have recently opened and broken records month on month.

We do not doubt that any deal happening in the market today will be considered a bargain two years from now and will generate excellent results for almost all investments. Yet we believe that we will see a slowdown in the coming months, as bigger players discover there might not be a whole bunch left to buy.

FINALLY, WHAT ARE YOUR COMPANY'S GOALS FOR 2022?

Ultimately, our goal is to continue to expand and battle for our partners' market share. MediaTroopers would love to sustain its position as the market leader in the US in the affiliate business and assist newly regulated states, and others who would love to establish a successful marketing plan and execution.

While we have seen remarkable growth in a short time, our biggest challenge is to continue this prosperity. We have some new and exciting things lined up to help propel MediaTroopers even further into the future. Thankfully, we have strong partners on the ground like SCCG that are helping us cover turf, and explore new territories and states as they legalise; even before they officially launch.





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ITALY: THE RESTRUCTURE OF REGULATION

At the 2021 Betting on Sports Europe event, **Isabella Aslam** attended the Italy 2022 – Reform or Shake-up panel, discussing the development of Italian sports betting

It's been a rocky road for the gaming industry as a whole over the last two years, but especially the Italian market. That's not only due to the Covid-19 closures of retail outlets, but legislation and regulations that have tightened nationwide. At a recent industry conference, a panel discussing such prospects and development strategies was led by Quirino Mancini, Partner at Tonucci & Partners, and included CEO of Microgame, Marco Castaldo, Managing Partner and Founder of Sbordoni & Partners, Stefano Sbordoni, and CEO of OIA Services, Carmelo Mazza.

"There are two main things that are very important," said Sbordoni. "Tenders – and the rearrangement of the existing laws and regulation. The distinction is that laws are primary and regulation secondary." One topic covered by Castaldo was based on the sentiment of the operator, and who has the responsibility of making short term and long-term decisions on how to run businesses. Mancini asked: "Is there a way to deal with it?"

"The sentiment is very positive in terms of the dynamics of the market post-pandemic. That's a great and important contextual element to keep in mind," says Castaldo. "We have an online market which, this year, should reach about four billion in gross gaming revenue (GGR), which is a very significant number. This is important in the context of upcoming changing regulations. Why is this important? Because we are facing the Government talking about a reform of the legal framework for the sector and we are facing a structural change in the business. This is due to the pandemic essentially accelerating an underlying trend that was there before."

Castaldo explained that before the pandemic in Italy, "online gaming is a function of the totals of 9%, it's very low by European standards. Probably now, we have reached around 25%, but the pandemic has created a change of habits. A change in operator behaviour will continue to drive growth in the online segment at a detriment to the land-based segment.

"So, whether you have your discouragement or hopes, to some extent it depends on where you are in the market right now. The land-based market faces the greatest uncertainty because unless the contradiction in central and local regulation is resolved, it will be impossible to enact the new tenders to renew the licence. Land-based locations will continue to face difficulties in certain regions where the distances from sensitive locations have meant a lot of these locations have been closed."

Castaldo concluded: "The land-based industry needs to restructure regulation – more than the online industry. But on the online side, one very important aspect is that the pandemic has also focused the industry on multi-channel business modules, because

the conversion of players from betting shops online have led many of the large operators in Italy to really refocus their business toward trying to attract affiliate online players in shops.

"There is a very specific multi-channel model which is developing very fast and I estimate it represents almost 70% of the market right now. The regulatory aspect of this is not very well defined, because in the regulation for betting shops and regulation for online, there are some loose connections. We are waiting to see what the new framework is that will take this evolution of the business model into account."

Although the future of restructuring such regulations seems a daunting prospect, Mazza and Castaldo remain positive about the future of Italian sports betting. Speaking from a live video call, when asked what his opinion was on the subject, Mazza commented: "I have to say I would like to be optimistic about the future of the Italian market. I believe the most important things that regulators should do in future rearrangements is consider the multichannel model that has been explored in Italy for some years, and regulate it in an adequate way. I think this is the real challenge."



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AFFILIATE CHALLENGES

Malcolm Darnley, at US-facing affiliate BestOdds.com, writes about tackling the sports gambling space

Sports betting is a high-margin industry with massive growth upside, in which the industry winners and losers are yet to be determined.

Vast amounts of both national and international funds are flowing into the industry to finance this newly legalised betting gold rush.

There have been plenty of discussions around the challenges faced by operators and the technology groups tasked with building the digital foundation for these companies.

However, what hasn't been reported on are the challenges being faced by the media outlets working in partnership with operators, whose goal and business model is built by driving new business to the sportsbooks.

REGULATIONS, LICENSING AND STAYING COMPLIANT

Legalised sports gambling for a large percentage of the world is a new concept and this includes almost the entire US market. When hundreds of billions of dollars is the projected market size of an industry, a business looking to break into that market would have to expect it to be highly regulated.

Government officials for each legalised state are trying to implement the necessary rules to ensure legal sports bettors have protection and the freedom of choice to pick the operator that works best for them. State officials also need to maximise their profit, while ensuring the sports betting market can continue to grow and prosper.

Not every state gets it right on its very first attempt. Regulations are often changing and keeping up with state-by-state requirements and changes is difficult, and very often confusing.

In most states where sports gambling is now legal, an affiliate company like BestOdds.com is required to be licensed before it is able to drive end users to a sportsbook operator.

States will launch their licensing requirements, and then adapt or change those requirements as they learn more. These requirements vary drastically, with some states providing licensing documents that are 30 pages long and incredibly difficult to fill out, even for experienced legal professionals.

The bottom line is that the sports betting industry needs to be regulated; but creating regulations, especially in a newly legalised sector, is a very difficult challenge for any government.

New companies need to set aside the time, money and resources required to stay compliant.

TECHNOLOGY LABOUR CRUNCH

The affiliate business is certainly not immune to the tech labour

crunch. Companies looking to break into the space must be very confident in their rolodex to hire the required short-term tech talent; and then they must be creative in how they hope to onboard future talent.

Internal training programs, and incentivising staff to onboard their talented friends and peers, are just a couple of ways some new affiliate companies are tackling the tech labour crunch.

THE RELUCTANCE OF FINANCIAL INSTITUTIONS TO WORK WITH AFFILIATES

On paper, an affiliate company seems like a straightforward business that checks off many of the boxes financial institutions look for in companies to partner with.

Successful lead-generating companies are highly cash generative and operate in the same gambling space as sportsbook operators, but without any of the same risk. Affiliate company profits or lack thereof are not tied into the results of a sporting event. There is no danger of a heavily backed underdog winning and forcing an affiliate company to pay out large sums of money.

That's what sportsbooks do.

There is also no danger that an end user is using an affiliate relationship to launder money, which is a real concern for the financial institutions who work directly with operators.

Despite the required transparency and lack of risk when partnering with an affiliate company, banking institutions are currently in no rush to help fund these types of new businesses.

We don't expect their reluctance to change anytime soon.

THE FUTURE IS STILL BRIGHT

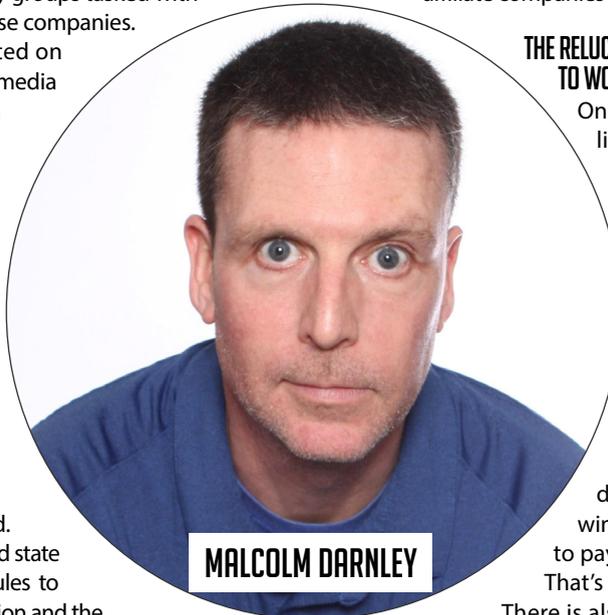
Trying to build a long-term affiliate company in the sports gambling space has its definite challenges, but it should also be mentioned that it is not all doom and gloom.

It is a model that has proven successful many times over.

The now legalised sports betting space in North America is just in its infancy and certainly some of the challenges and hurdles faced today will clear up in time.

It should be noted that for those affiliate companies who are able to overcome the current industry challenges, meaningful profits can definitely be achieved.

There is no easy money in sports gambling or in life, but that doesn't mean the hard work of a new company won't be rewarded if it is built properly.



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PLAY HARD



Rebecca Ciala, Affiliate Specialist, Hollywoodbets, discusses dream holidays, celebrities, superpowers; and of course Christmas films and songs as we approach the big day!

WHAT DO YOU LIKE MOST ABOUT YOUR JOB?

I love that I get to meet new people every single day. I have made great friends over the internet. Some of my favourite daily tasks include working together with my affiliates, planning strategies and discussing targets.

WHAT IS YOUR DREAM HOLIDAY?

A trip to Italy. I think one can find the perfect combination of activities, eating and relaxing. I would like to do everything!

I would love to hike the Cinque Terre, literally walking from one town to the next and just enjoying the beautiful views of the sea. I would especially love to see it during the spring season when new plants and flowers are blossoming.

Then, I would like to glide through Venice in a Gondola, silently enjoying a toured guide of the city, hearing conversations in Italian in the early hours of the evening when the sun has set, street lights are coming on and there is an almost romantic atmosphere that settles over the city. Next, I would go to dinner and stuff myself with lots of pasta and cheese, and drink plenty of sparkly wine.

I would love to visit the opera for a romantic and sad love story, just like in *Pretty Woman* with Julia Roberts. Visit historical sites like the Colosseum, take a tour of the lakes, explore the city in trains and cable cars, multiple visits to the beach and go skiing down the slopes of Cortina D'Ampezzo.

IF YOU COULD HAVE A SUPERPOWER, WHAT WOULD IT BE?

Telepathy, hands down! The power to read minds and alert someone's mind or even erase their memory. It would essentially bring a little more kindness and understanding for world peace.

WHICH FAMOUS PERSON WOULD YOU LIKE TO MEET AND WHY?

Kim Kardashian. I think a lot of people underestimate how smart and hard working she is. She has made social media a thing before anyone could see its potential. Today, she's a billionaire who used an unfortunate circumstance to get to

where she is. She is a true hustler. I would like to pick her brain one day.

WHICH SECTOR WOULD YOU LIKE TO WORK IN IF YOU WEREN'T WORKING IN THE GAMBLING INDUSTRY?

Probably e-commerce. It's still a relatively new concept in South Africa that saw a huge increase during the pandemic. I'm sure even if things were back to 'normal', a lot of people would continue to order online because they saw the convenience of having something ordered straight to their doors. Clothing and electronics are two top items that online shoppers go for.

THE BIG DAY IS COMING UP SOON, SO WITH THAT IN MIND, WHAT IS YOUR ALL-TIME FAVOURITE CHRISTMAS FILM?

My holiday season won't end with me watching *The Holiday* with Cameron Diaz, Kate Winslet, Jude Law and Jack Black. I would rather go for something along the lines of *Four Christmases*, *Almost Christmas*, *Dr Seuss' The Grinch* or *Klaus*.

AND HOW ABOUT YOUR ALL-TIME FAVOURITE CHRISTMAS SONG?

Joy to The World or *Christmas* (Baby Please Come Home) by Michael Bublé.

AND FINALLY, DO YOU HAVE ANY NEW YEAR'S RESOLUTIONS?

Yes, I definitely want to travel more. Italy is at the top of my list, followed by Greece in close second.







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