



EA Intel
Report 2020

Affiliates



- Betsson Group
- Paysafe's Income Access
- Matching Visions



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With 20 brands, including Betsson.com, Betsafe.com, NordicBet.com and StarCasinò, Betsson Group is one of the world's largest gaming groups, at the heart of entertainment for over five decades. Betsson employs 1,800 talented people from more than 55 nationalities across ten offices worldwide.

WHAT WE ARE PROUD OF



30%
INTERNAL
HIRING RATE



4,000+
APPLICATIONS
PER MONTH



53
BOOMERANGS
(RETURNING
EMPLOYEES)
IN 2019

WHAT DO OUR BETSSONITES SAY



87%
ARE PROUD TO
WORK WITH US



89%
BELIEVE THAT
WE ARE A
RESPONSIBLE
OPERATOR



86%
RECOMMEND US
AS AN EMPLOYER

WHAT DOES THE INDUSTRY SAY



**GREAT PLACE TO
WORK 2020**

- INTERNATIONAL GAMING AWARDS -



**COMPANY OF
THE YEAR 2019**

- WOMEN IN GAMING AWARDS -



**EMPLOYER OF
THE YEAR 2019**

- EGR OPERATOR AWARDS -



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Introduction

Cast the net

The EGR Affiliates 2020 report gives voice to a range of affiliates, providing an update on the trends, concerns and service offerings provided in 2020.

As we well know, 2020 has seen the novel coronavirus pandemic putting paid to sporting events around the globe. Within this report, the affiliates give thought to how they have adapted and offered support to their partners throughout this unprecedented time.

There is no crisis without opportunity, and the contributors also look at the positives this time has brought, with many having had to rethink their strategies and provide new offerings to those accustomed solely to betting on real sports. 2020 has therefore proven an interesting time, having allowed operators and their affiliates a chance to rethink their approach in terms of promotions and offerings.

Overall, we hope this report will provide an inspiring range of viewpoints from several players in the affiliate space.

By Ross Law | *Report editor*

Featuring: *Betsson Group*

United in the year of coronavirus



Sebastian Jarosch

◆ *Head of affiliates*
◆ *Betsson Group*

Sebastian Jarosch started his career in egaming in Malta 13 years ago. He started as a customer support agent and quickly took on more responsibilities, including content management, poker management, affiliate and network management. He eventually joined GiG as an affiliate manager for their poker affiliate site seven years ago. Jarosch became head of affiliates after a year and turned around the declining business back to growth within a business quarter. After two years he took on the role of poker affiliate director, where he broke all previous records. In mid-2020, he joined Betsson Group as head of affiliates.

Sebastian Jarosch of Betsson Group reflects on what the operator has done to continue and further develop its working relationships with affiliates in 2020

EGR Intel (EGR): What has changed throughout the pandemic for Betsson Group?

Sebastian Jarosch (SJ): The pandemic has brought with it a lot of changes and it is always up to us in terms of how to shift things around to try and turn some of the new challenges into opportunities. I think the biggest changes were felt in the markets with a strong sportsbook presence, especially during the first few months when all major sporting events were cancelled or postponed.

This, together with the closure of land-based casinos and betting halls, has meant that we had to shift our focus and that of our affiliate partners to other verticals and other markets, some of which perhaps weren't previously getting a lot of attention. Among others, we have seen the re-emergence of poker, a spike in esports events, and a huge interest in ping-pong – all of which gained a lot of momentum during the past months. This was an opportunity for us to reach out and reactivate some of our affiliate partners as well as reach out to new affiliates who focus on these verticals or markets.

Another shift was of course the fact that most of us started working from home. Betsson Group encouraged all its Betssonites across the globe to work remotely at the start of the pandemic and most of us still do. Some offices have remained open on a voluntary basis, but new rules were introduced in accordance with the health regulations of each country, such as a limit on the amount of people at the office, added hygiene, social distancing, face coverings, etc. I must say though that I believe the Group handled this extremely well. The induction programme for all new starters, including myself, was done online, together with a shift

in most of the employee experience activities – we have had global online slots tournaments, poker tournaments, a singing competition, and much more. We have also joined the onboarding programme and are now giving an intro session to every new starter about what the affiliate team is responsible for, what we do, how we support the business, etc. This and other training has all now shifted online.

The global pandemic means that we are all in the same situation, wherever we are based. I feel like it has made everyone (us, and our affiliate partners) want to work more closely in order to reach our respective goals

Sebastian Jarosch | Betsson Group

The pandemic has also brought all air travel to a halt and all the major affiliate events were postponed or cancelled altogether. This meant that we were not able to meet our affiliate partners in person and we could not network with new potential partners. Our mindset on this was to reach out to our partners by increasing our communication efforts and ensure we were reachable and ready to help. It also meant that to reach out to new partners, we decided to shift our conference budgets to digital advertising on several sites, including trade media as to support the industry itself.

EGR: How have affiliate relationships developed during this time?

SJ: I think they have actually improved. The global pandemic means that we are all in the same situation, wherever we are based. I feel like it has made everyone (us, and our affiliate partners) want to work more closely in order to reach our respective goals. Everyone has been putting in more work, become more responsive and been open to change.

Change was something that we all needed to go through, and we needed to be agile enough to move things around from sports to casino in terms of assets, deals, promotions, sites, traffic, etc.

Our relationship with our affiliate partners became virtual and I am happy to see how the entire affiliate team worked together in order to exceed our partners' expectations.

EGR: How have your levels of support and the way you support them changed?

SJ: Betsson Group's vision is to offer the best customer experience and I believe that we can extend that to our affiliate partners too. We have increased the support hours that we offer and this has been getting some good feedback. Affiliates seek a fast response – whether they want to talk to their account manager or need help with an artwork or tracking links – they want to sort matters out as quickly as possible. The increased hours of support, as well as the added channels of support (including Skype), have meant that we are able to serve our partners better, faster and more efficiently.

As I mentioned earlier, we have also increased our communication efforts and made sure to keep all our partners updated with the current situation around the different markets and respective regulations, as well as inform them about new markets, new brands (Jalla in Sweden and SuperCasino.ee in Estonia), the rebranding of Casino.dk, new games, new promotions, and everything else we thought would be informative for them to know. We also shared some of our good news when we were short-listed for awards, such as at the upcoming EGR Operator Awards.

During this time, we have also launched a brand new Betsson Group Affiliates website (www.betsson-groupaffiliates.com) which, besides looking a million times better, has added features for our affiliates, more functionality, and is faster, has more comprehensive FAQs and more.

EGR: Once the pandemic is over, what positive lessons will Betsson Group take into the future in terms of how affiliates are served?

SJ: The ability to tap into new opportunities, shift budgets, and switch from working at the office to working from home has ensured that we have all learnt how important it is to be agile and adapt to change quickly.

During this time, we have made a lot of work to improve our reputation and be removed from any predatory listings, so we will be continuing this



work. We have also taken the opportunity to re-shape our affiliate structure in a way that we're able to work much closer together as a team, communicate more easily and ensure that we all chase the same goals. We will of course keep the localised approach as we believe that this is key for our success; however, the reporting lines have changed to ensure that we can share expertise, get more synergies, pool budgets, have bigger global deals and work better as a team with aligned goals.

Moreover, we have introduced some automation and optimised some of our processes in order to be more efficient and faster when it comes to deal approvals, compliance, flagging any suspicious behaviours, etc.

All of this will help us in providing a top-notch support service to our affiliate partners – something that we have done during the last months and are looking into ways as to how we can further improve this and ensure we are scalable to meet the new demands when we launch in new markets.

In the end, the biggest lesson for all of us has been the importance of flexibility and diversification – be able to change challenges into opportunities and do not shy away from major changes. This crisis has shown me that the Betsson Group affiliate team is robust, reliable and is able to deliver success even in the worst of conditions. I'm proud of their work and humble to have been given this opportunity to lead them to further success. ♦

Featuring: *Paysafe's Income Access*

Affiliates continue to expand, optimise and drive growth



Erica Anderson

- ◆ Marketing director
- ◆ Paysafe's Income Access

Erica Anderson's role focuses on developing the marketing strategy for the Income Access brand. Holding a decade's industry experience, she also oversees the company's in-house affiliate management team and its suite of digital marketing services. Income Access manages close to 20 affiliate programmes.

Erica Anderson of Paysafe's Income Access reflects on the results of the firm's most recent affiliate survey

For the launch of the most recent Income Access affiliate survey, our team once again reached out to our network of affiliates in an effort to better understand their current focuses across a range of areas. As this was our third such survey in the last four years (2017, 2018 and 2020), each of which having enjoyed a similar response rate, we were able to do a comparative analysis for several metrics over that timeframe.

Conducting a survey at this time also allows us to consider affiliate responses in the wake of Covid-19, including those related to key motivators for affiliates, mobile traffic, and markets and verticals of interest. To begin, however, we take a closer look at some defining characteristics of our respondents.

Experience, traffic and brand partnerships

For the third consecutive survey, a majority of respondents had at least five years' experience (59%), while 19% had at least 15 years. The 41% of participants with fewer than five years of experience surpassed the previous high of 35% from our first survey back in 2017.

Veteran and less experienced affiliates proved to be similarly focused on making their online offering as accessible as possible. Of those affiliates with at least five years' experience, 84% said they have a mobile-optimised site and/or an app, while 79% with fewer than five years claimed the same. Overall, only 10% of respondents said they had neither a mobile-optimised site nor an app.

The importance of being optimised for mobile was further reflected in the 54% of affiliates with more than half of their traffic originating from mobile devices, while only 4% said that none of their traffic is mobile based. This is one area in

which we have seen consistent increases for the last five years, dating back to our 2015 *Mobile Acquisition* survey, where only 20% of affiliate respondents said that at least half of their traffic came via mobile.

With a better understanding of how affiliates currently acquire traffic, we also sought a greater awareness of the varying scope and size of their businesses by asking respondents how many brands or operators they currently promote. One of the more telling stats from our survey is that the most popular response came from the 24% of affiliates that said they promote at least 100 brands. On the other end of the spectrum, 21% of affiliates only work with between one and five brands.

Despite the global challenges currently confronting many industries, egaming affiliates continue to strategically expand their reach, even spurring increased optimism across several markets

Erica Anderson | Paysafe's Income Access

Responses also showed a correlation between experience and number of partnerships as 43% of affiliates with a minimum of five years' experience promoted at least 50 brands. Conversely, 36% of affiliates with less than five years only had between one and five brand partners, representing the most popular response among that segment.

Market motivations in current environment

In addition to scope and reach, it was also important to look at the biggest factors that motivate affiliates to promote brands. When asked to rank the provided options in order of preference, respondents made 'higher payouts and commission rates' the overwhelming favourite, as 70% said it was their biggest motivator. Coming in a distant second was 'new brands and markets' (16%), while 'per-

formance incentives and bonuses' (7%), 'affiliate contests' (5%) and 'random ad-hoc bonuses' (2%) rounded out the options.

The importance of 'new brands and markets' remains significant as 51% of affiliates made it their second choice and an additional 17% picked it as their third most important motivator. When it came to affiliate contests, 65% of respondents ranked it as their least important motivator.

To further examine that interest in new brands and markets, we asked affiliates about their current and future markets of interest, which provided an array of responses that both mirrored and departed from responses in previous surveys.

Unsurprisingly, Europe (72%) and the UK (64%) were the most popular markets in terms of current activities, although it did mark the first time in the last three surveys in which the UK was not the top selection. Another first was that Canada, which had never reached the top five for this specific question, was selected by 45% of respondents, narrowly topping the US (41%). Asia (23%) rounded out the top five, while Africa and Latin America each had 17%.

Illustrating the importance of diversity, 74% of all respondents had promotional activities in at least two different markets. Looking at those cross-market activities in more detail, we found that 79% of those affiliates working in Canada were also operating in Europe. This was slightly higher than the 71% of affiliates promoting in the UK that also had a European focus.

When considering future market interests through the rest of 2020 and into 2021, North America was again featured prominently, with the US (46%) and Canada (33%) finishing as the top two selections. Asia (28%) was next, followed by Latin America and India with 22%. It was another important jump for Canada in the context of these surveys, while the US and Asia have finished in the top three every year.

The focus on North America also resulted in 48% of those considering entry into the US market expressing a comparable interest in Canada. Similarly, 54% of affiliates interested in the Asia market also selected Canada as a potential market of consideration.

State of traditional & emerging verticals

One of the most consistent findings across every survey we have conducted has been the dominance of sportsbook and casino when it pertains to current verticals of focus. Once again, casino (76%)



was the most popular selection, followed by sportsbook (53%) and then bingo (25%) in a distant third. This was followed by a three-way tie between poker, crypto and forex/financial at 16%. Esports (13%), lottery (7%) and fantasy sports (7%) rounded out the list.

We did see a new development when comparing this survey to past results for verticals of interest for the year ahead and beyond. While casino (43%) and sportsbook (41%) were at the top as usual, crypto's move into the third spot (24%) was impressive given that it was the first time it had ever been included as an option. Esports, which was the top selection in our 2018 survey, still received strong interest with 23%. Poker (21%) slipped out of the top three for the first time but remained just ahead of fantasy sports, lottery and forex/financial, all of which earned 17%.

A closer review of the data showed that casino and sportsbook were the only verticals with notable cross-promotional appeal across each of the more niche verticals. Of those who selected crypto, 61% also chose casino while 69% had sportsbook. In the case of esports, both were lower but still among the most popular alternatives as 36% selected casino while 27% also picked sportsbook. Further highlighting their niche quality was the fact that only one affiliate selected both crypto and esports as responses.

Among the conclusions that can be drawn from the above are that despite the global challenges currently confronting many industries, egaming affiliates continue to strategically expand their reach, even spurring increased optimism across several markets. Through larger volumes of mobile traffic, growing interest across the North America and Asia, and sustained momentum for less traditional verticals (crypto, esports, lottery and forex) affiliates continue to drive long-term confidence across the wider industry. ♦

Featuring: *Matching Visions*

The new chief operating officer has arrived



Matching Visions

Matching Visions is a top affiliate network that houses thousands of affiliates and hundreds of top brands for ultimate ease. As an affiliate, you will have one contact, one on-time payment and tons on offer! As a brand, get access to the best affiliates, top traffic and the chance to grow your affiliate selection!

Matching Visions outlines its company ethos and shares news of its newly appointed chief operating officer

Matching Visions is a leading online affiliate network in the egaming space, housing over 3,000 affiliates and hundreds of casino brands to ensure both publishers and advertisers get the best of both worlds. Matching Visions has been at the forefront of the gaming industry for more than a decade and knows what affiliates want. Instead of having hundreds of contacts and chasing countless others, we do it all for you with one point of contact and one speedy payment every month.

Connection is everything at Matching Visions, and that's why we tailor a unique service to each and every affiliate we work with. With exclusive campaigns, competitions and specialised deals, there's no reason to go anywhere else. We have been around the block and know what works and can guide you to the very best brands and campaigns on the market.

What it means to be an affiliate at Matching Visions

Matching Visions offers publishers access to the best rev-share, CPA and hybrid deals on the market. Not only that, but we also offer affiliates special monthly bonuses and promotions that you can't get anywhere else.

If you're an affiliate or publisher, you get many benefits:

- ◆ One account with all brands in one place
- ◆ One appointed manager to assist you, every step of the way
- ◆ One on-time payment instead of chasing many brands
- ◆ Hundreds of casinos in various locations across the globe
- ◆ Exclusive deals, promotions, bonuses, races and so much more!

One of the unique features that helps Matching Visions stand out is our monthly competitions and promotions. This helps affiliates, both large and small, to enjoy extra bonuses and prizes ranging from cash to iPhones and much more. Each month is different and caters for a wide selection of affiliates to ensure everyone gets the chance to enjoy something.

At Matching Visions, we have seen trends come and go but our focus is always on making sure that no matter what, traffic and campaigns remain the same and that we make sure everything that comes and goes through our doors is something we strongly believe in.

Matching Visions has a strong team with a variety of roles including affiliate managers, directors, a dedicated finance team, top developers, as well as a meticulous compliance department. All relationships created at Matching Visions are aimed at the long term. We believe that if the client is happy and succeeding, then we are too.

Being an operator with Matching Visions

As an operator with Matching Visions, you get access to a wide range of benefits:

- ◆ A dedicated team at Matching Visions to achieve all of your goals
- ◆ A wide variety of affiliates in many different locations with top quality traffic
- ◆ A variety of traffic types including SEO, PPC, email, mobile marketing, and more
- ◆ Hassle-free management of your brands and deals.

Becoming compliant

Being compliant is extremely important. After the 2019 Swedish regulations, we realised the importance of compliance and the need to get affiliates fully compliant as soon as possible. At Matching Visions, we welcome all regulations in the market as it gives them a chance to shape and assist their af-



filiates in being the most compliant they can be.

We have an internal compliance department that meticulously checks on all compliance regulations to ensure their affiliates are fully compliant. Further to this, we also have an internal KYC process to ensure all affiliates are compliant and streamline processes to be quick but thorough when it comes to all things related to compliance.

Growing markets in 2020 and 2021

The thing we have learnt to appreciate most is the trust and unity we have achieved within the organisation. Since the day Matching Visions opened its doors, we have experienced steady growth in all areas. The nature of the business is to acquire as much traffic as possible at the best price possible and selling it at a reasonable profit.

Staying ahead of the curve, anticipating future needs or requirements for certain markets and adapting early is key. Achieving this is no easy task

and it all starts with careful planning, taking a few risks and most importantly a solid team.

Having done this well so far has given us a great reputation with affiliates, which as a result has attracted more and more affiliates to join the network and has in turn increased traffic. Having more traffic allows us to bring more operators and their brands onboard, however, we need to know what our affiliates want in a brand before adding it to the network and deliver it before our competition.

The new chief operating officer

Leanne Muleba has been announced as the new chief operating officer at Matching Visions.

“Having worked for Matching Visions for almost five years, we have been thrilled to see her grow and flourish to be the best employee we could ask for. She is a critical part of our team and couldn’t ask for better,” Dennis Dyhr-Hansen, CEO at Matching Visions, said of the appointment. ♦

bet365 Affiliates

MORE LIVE STREAMING,
MORE IN-PLAY MARKETS,
A WORLD OF OPPORTUNITIES



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