



Search Pattern Analysis in the German Online Gambling Market

Conclusions for Responsible Gambling in the Scandinavian Markets

PROF. DR. ANDREAS DITSCHKE

Abstract

Player protection and responsible gambling require that players are drawn into the regulated, licensed market. In the online gambling market, players practically have the choice between legal and illegal product offerings.

In a broad study, we have analyzed search patterns of potential players on Google for the German market from an affiliate perspective. The German online gambling market is highly regulated, and research indicates a relatively low channelization rate compared to Scandinavian markets.

Our analysis of the 40 most frequently used search terms, representing 250,000 searches per month, shows that 17 % of the volume specifically refers to illegal products and, when restricted wording as per the German regulatory framework is included, 85 % of the search volume refers to products that should not be offered in the regulated market.

We also show that there is a decreasing trend of explicit searches for either legal or illegal offerings, indicating that this distinction is becoming less relevant for players.

Finally, we present how operators and affiliates deal with players who do not find the product they have searched for, and how the latest Google restrictions on paid advertising affect the online gambling market and the channelization.

Affiliates in the online gambling industry are like bird catchers



The affiliates' birds are potential players, flying freely in the borderless sky of the internet.

Affiliates attract them and make them land in their bird cage.

They want them on their **landing pages**.

Affiliates know exactly what the players are looking for



Affiliates must be found.

They use **keywords** to attract the right birds and Search Engine Optimization to convince Google to show them on a top position.

If they are not shown on the first page of the Google search results, they are meaningless.

The profit of the affiliate depends on two conversions

First, the player must convert from the affiliate page to the operator page.

Second, the player must convert there again and make a deposit and play.

The advantage of the game provider is that a commission is only due when revenues occur. **There is no waste of advertising money.**



Imagine you want to play online slots – what would you google for?

SEARCH

„best online casinos“

„best regulated slots“

„safe online casinos“



RESULT

AFFILIATES



GAME PROVIDERS

Your search results will include some affiliates and some operators or game providers.

Affiliates only make money when they catch the players first. They are the **experts for search patterns**.

Not everyone likes the licensed product offering – an example

Licensed product:

- 1 Euro spin limit
- 5 seconds wait between two spins
- 1.000 Euro deposit limit per month
- Wagering tax 5.3 %

Message to the player:
“Great to have you here.
Playing without limits is not allowed in
Germany.
Since you are here anyhow, please
pick from what we have on licensed
menu.”

Huge search volume:
„German online Casinos without Limits“

What will the player do?

The door of the bird cage is wide open. The internet is borderless.

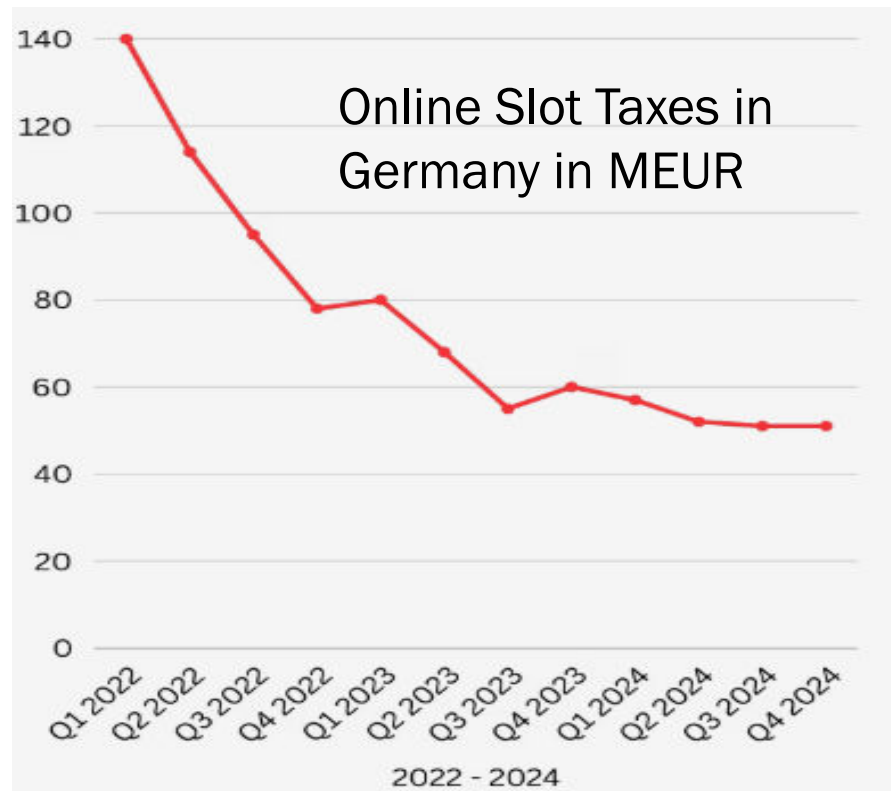


Most **players bounce back** when they do not find what they searched for.

This is a negative signal for Google.

Some operators and affiliates „invite“ players to use **VPN** to access products that cannot be legally offered in Germany.

Online slots taxes indicate move from licensed to black market



Source: German Tax Authorities Report

German online slot taxes dropped by 70 % since 2022.

Black market share estimates range between 50% and 80 %.

Black market share is debated between market participants and the regulator.

Search pattern analysis - research methodology

Analysis of the top **40 keywords** in the German gambling market

Representing **250,000 searches** per month

Data refers to November 2024

Glücksspielstaatsvertrag (state treaty on online gambling) as reference for regulation

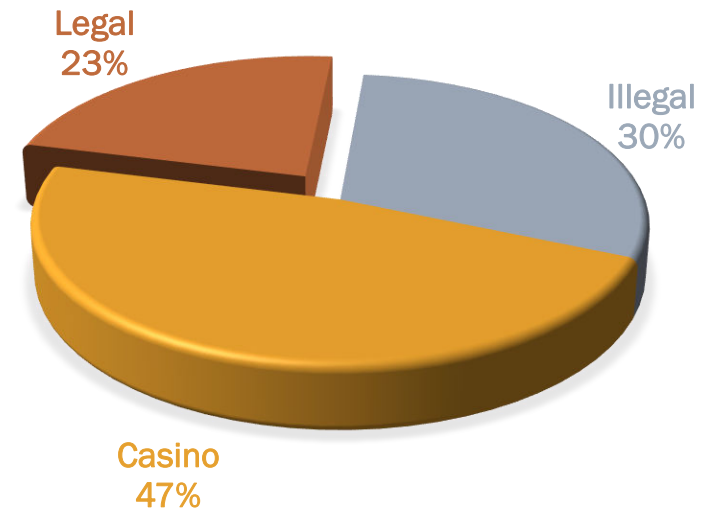


Out of the top 40 keywords only 23 % refer to legal products

keyword (not including operators)	monthly_searches
online casinos	110000
online casino deutschland	18100
online lotto spielen	18100
online poker	8100
blackjack online	6600
online casinos paypal	6600
beste online casinos	5400
online casinos echtgeld	5400
online casino ohne einzahlen	4400
online roulette spielen	4400
online slots	4400
paysafecard online casinos	4400
roulette online spielen	4400
blackjack online spielen	2900

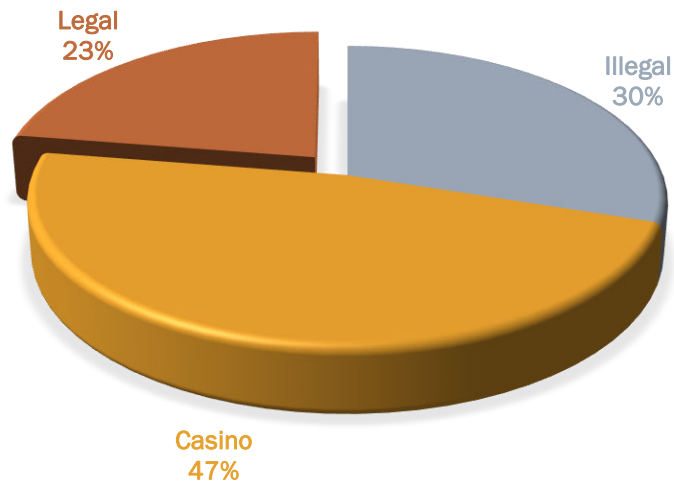
...and more...

KEYWORD BREAKDOWN

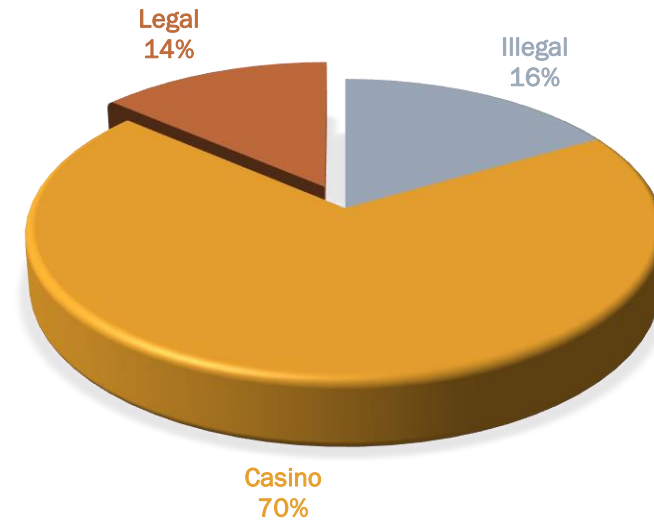


Only 14 % of the weighted search volume targets legal products

KEYWORD BREAKDOWN



WEIGHTED KEYWORD BREAKDOWN



The word „casino“ for slots is forbidden in the German market

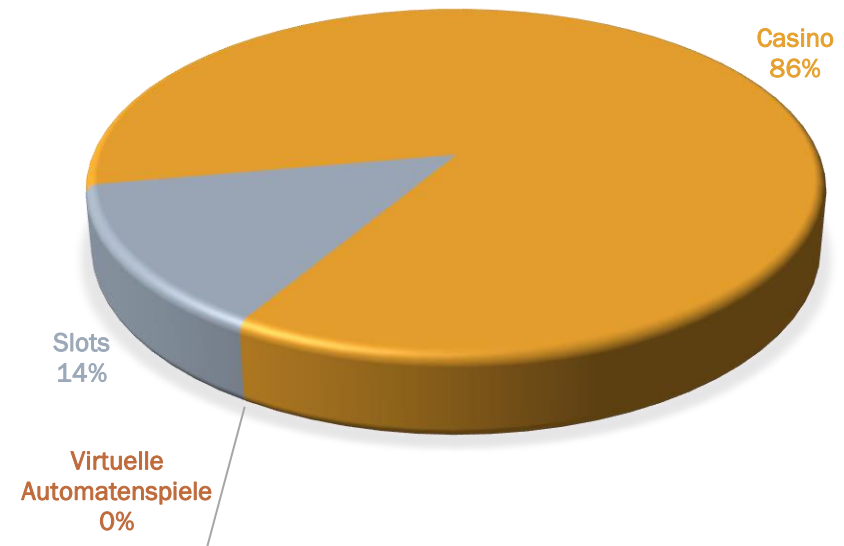
The word „**casino**“ is commonly used for **online slots** in Germany.

The gambling state treaty (Glücksspielstaatsvertrag) rules out the use of the word „casino“ for slots.

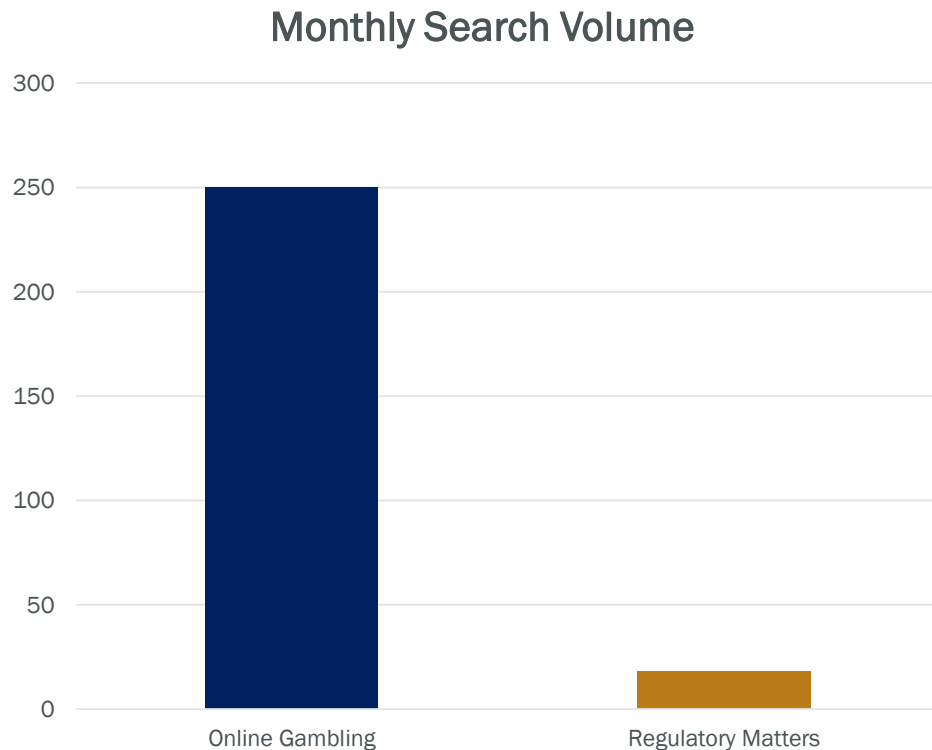
The proper word is „virtuelle Automatenspiele“.

There is practically **no search volume** for „virtuelle Automatenspiele“.

KEYWORDS FOR SLOT GAMES



The search volume for regulatory matters is low and declining



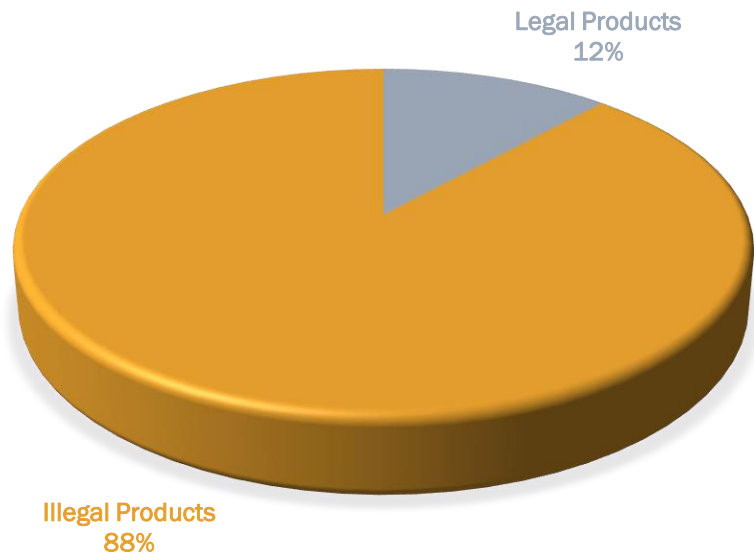
Compared to 1 year ago	Count of Keyword	
Decreasing	74	60%
Same	44	36%
Increasing	5	
Grand Total	123	

60 % of the „regulatory keywords“ are declining.

Potential players differentiate less between legal and illegal products.

Illegal websites get 88 % share of voice of the „regulatory search“

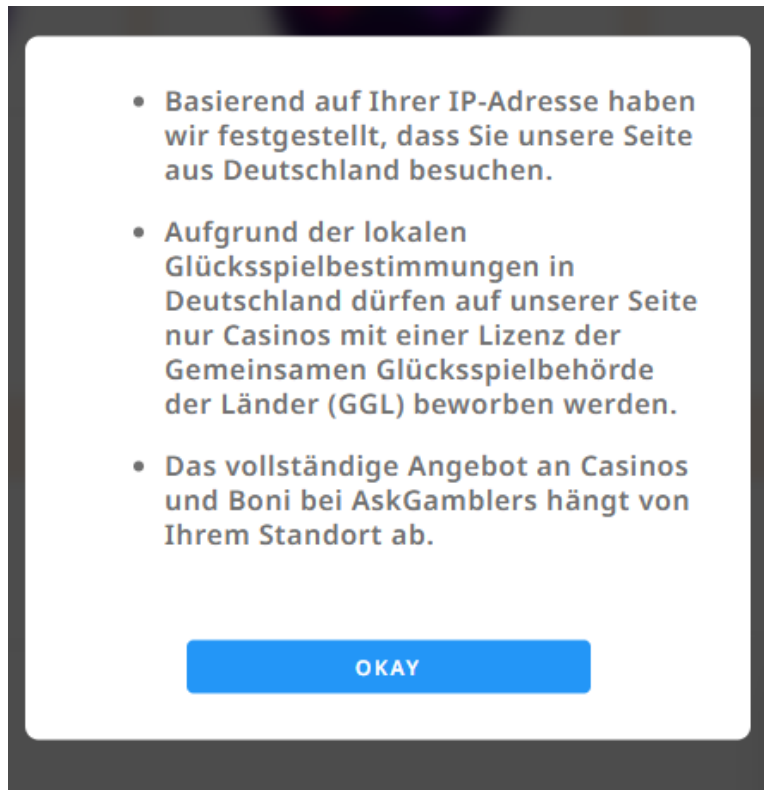
SHARE OF VOICE "REGULATORY SEARCH"



Frequent keywords:

- With EU license
- Without deposit limit
- Without betting limit
- Without taxes
- Without DE license
- Without 5-seconds pause
- High-stakes slots
- Without limitations
- Without schufa

Playing illegal games is a criminal offense for the player – easy with VPN



Website example:

„Based on your IP address we found out that you visit our page from Germany. Due to local gambling regulations in Germany we are only allowed to advertise GGL licensed casinos.

The complete casino offering and bonuses...depends on your location.“

Conclusions

For players, it is a reality that both markets, legal and black, co-exist.

Players have almost given up searching specifically for legal products, but they continue to search for illegal products.

In Germany, the interest in illegal, unlicensed online gambling is massive.

Players care less and less if they play legally or illegally.

High-rollers and potential gambling addicts are likely to leave the regulated market (higher limits, more thrill).

Regulation only protects players who play in the regulated market. Most online slot players don't.

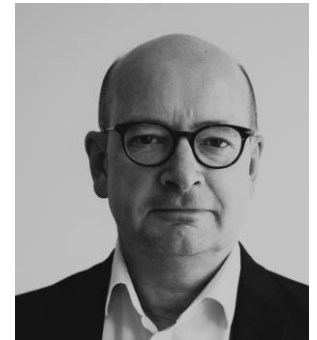
Repressive actions and regulation alone did not result in high channelization.



As long as players are free as a bird, they will consume what they like.

Regulation must balance repression and attraction – otherwise players will keep searching the black market and consume what they want.

Thank you!



Dr. Andreas Ditsche
Professor at Kutaisi International University
CEO of iGaming.com Group GmbH



iGaming.com

<https://www.linkedin.com/in/dr-andreas-ditsche-6a084b91>