

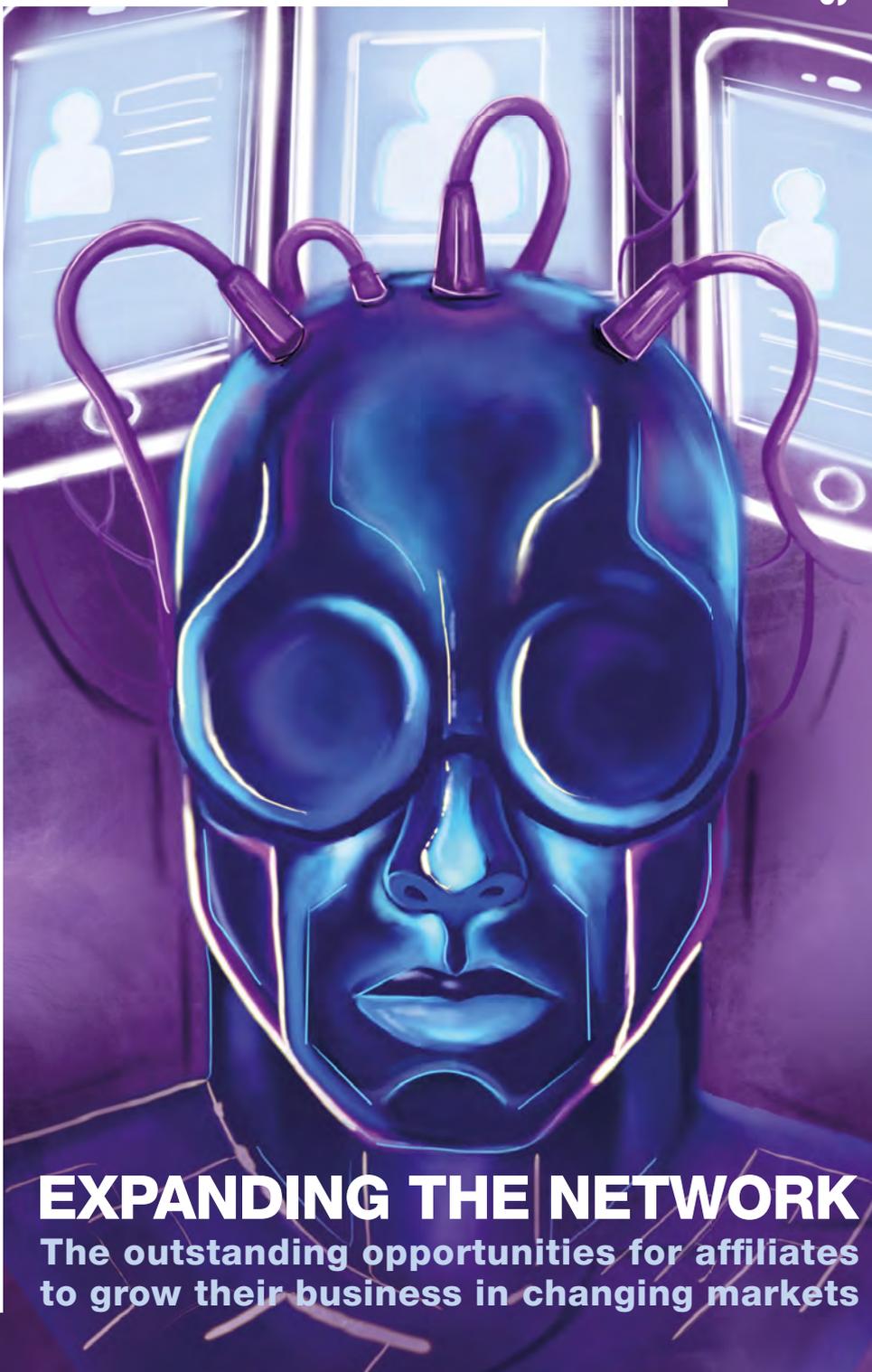
trafficology

AFFILIATE FOCUS BY GAMBLING INSIDER

INSIDE

- LIAC PREVIEW
- THE VALUE OF YOUTUBE MARKETING
- US OPPORTUNITIES
- ADVERTISING REGULATION UPDATE
- TIME FOR INTEGRITY PARTNERSHIPS?

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EXPANDING THE NETWORK

The outstanding opportunities for affiliates to grow their business in changing markets

CATENA MEDIA ACQUISITIONS HELP REVENUE RISE 73%

WINNERS

Better Collective has outlined a record 66,000 new depositing customers across its network assets and underlying revenue of €9.7m (\$11.4m) for Q2 2018.

Online affiliate and content marketing company Raketech enjoyed a revenue increase of 41% to €6m (\$7m) for Q2 2018.

EVEN

Digital media company Independent Content Services launched a new sports betting feature on Alexa ahead of the new Premier League season.

Studies have shown page engagement of the top 20,000 brand pages on Facebook is down 50%.

LOSERS



Catena Media saw its revenue rise 73% to year-on-year to €26.1m (\$29.9m) in Q2, aided by acquisitions that have allowed it to enter new markets and various verticals.

The Malta-based marketing and sales lead generation specialist has released its interim report, including EBITDA of €12.1m, up 51%.

The half-year results were equally impressive, as revenue reached €49.96m, a 65% year-on-year increase.

EBITDA increased by 67% year-on-year to €22.5m for H1, corresponding to an EBITDA margin of 45%.

One of the main figures behind the increased success was the 59% increase in new depositing customers in H1, which now totals over 270,000.

Catena entered the Italian market through the acquisition of ASAP Italia for a cash payment of €16m in June.

The company also entered into the French market through the €8.2m

purchase of ParisSportifs.com, one of the nation's leading sports betting sites.

Expanding into new verticals such as financial services has further bolstered the company's results.

Acquisitions such as US-based private equity service, TheHammerstone.com, and Australian-based premium stock market and news analysis site, TheBullcom.au, ensured the company diversified its revenue.

Catena has strengthened personnel-wise, too, replacing acting CEO Henrik Persson Ekdahl with Per Hellberg in April.

In previous roles, Hellberg served as CEO of Nordic Gaming Group, overseeing divestment of the company to Betsson AB. Prior to that, he held the position of CEO for Readly International AB and has served as a Marketing Director for Sony.

His appointment was followed by the addition of Andreas Ericson as the company's new Head of Mergers and Acquisitions in July.

\$136 BN

Betting turnover on the 2018 Fifa World Cup, according to analysis conducted by Fifa and Sportradar

26M

Number of Facebook likes GiveMeSport has. The site's parent company, Breaking Data Corp, has purchased supplier Oryx Gaming

21

New minimum age for casino players in Belarus, after the country's president signed a decree legalising online casinos

\$40BN

Amount surpassed by commercial gaming revenue in the US during 2017, as shown by research from the American Gaming Association

PASS NOTES

Italy gives final approval to outlaw gambling advertising

CIAD! WHAT BRINGS US BACK TO ITALY SO SOON... IS IT THE WEATHER?

It's still very warm and sunny in Rome but, no, that's not the reason. In fact, we've had a major development in the Italian gaming climate, with the new coalition government's plan to ban gambling advertising being approved by Italian Parliament by 155 votes to 125.

WHY IS THE PLAN CALLED THE DENTISTRY DEGREE?

Close. Although it will be a kick in the teeth for gambling companies in Italy, the new law is named the Dignity Decree and was first approved in early July before receiving final approval on 7 August.

WOW, THAT ESCALATED QUICKLY. HOW HAVE BETTING COMPANIES RESPONDED?

LeoVegas Italy Managing Director Niklas Lindahl was one of the first to react, writing an open letter to Deputy Prime Minister Luigi Di Maio and warning that a ban on advertising would simply send bettors to unregulated bookmakers. Although this claim is refuted by Di Maio, Google has since reported unlicensed operators topped its search engine results.

Sports sponsorships will also be outlawed, with half of Italy's top football division Serie A currently having deals in place with betting firms. Interestingly, Marathonbet has entered into a new shirt sponsorship with Lazio, but this will only last until the end of 2018, as the ban comes into effect on 1 January 2019.

HOW WILL THIS AFFECT AFFILIATES?

Under the new law, it will be illegal to advertise gambling products and services on the internet, radio and TV, with the exception of the state-run national lottery. Affiliates are directly hit as they won't be able to promote gambling sites in Italy, with sign-up offers no longer allowed to be advertised.

AT LEAST IT'S STILL WARM AND SUNNY IN ROME, THEN...

MOVERS AND SHAKERS



The Netherlands Gaming Authority has appointed **RENÉ JANSEN** as its new Chairman, following Jan Suyver's departure earlier this year.



IAN PENROSE has been named as a Non-Executive Director of supplier Playtech. Penrose, who was Sportech CEO between 2005 and 2017, will become a member of the Audit, Risk and Compliance, Remuneration and Nominations committees.

QUOTE UNQUOTE

"Sports betting was positively affected by the Fifa World Cup in football. This event, combined with successful acquisitions and a generally solid performance, resulted in the highest revenue and NDCs in the company's history. Better Collective aims to be the best sports betting affiliate in the world."

Jesper Søgaard, CEO & Co-Founder of Better Collective, updates investors on Q2 2018 trading

"Partnering with Income Access was an easy choice. Their platform gives our brand and affiliates a flexible solution to grow, while their track record is also impressive. With 21.com's marketing mix including affiliates, media buys, social media and many other sources, we believe we have found the right formula for generating large volumes of traffic from affiliates, while also building brand awareness through other channels."

Robin Ivarsson, CEO at operator 21.com, discusses the online and casino brand's new affiliate program and partnership with affiliate marketing firm Income Access

"We are proud to welcome FansUnite into our family of partners. They share our belief in the power of football to bring supporters together, whether that is at King Power Stadium or around the world."

Jonathan Gregory, Premier League football club Leicester City's Commercial Director, on partnering with sports prediction platform FansUnite

TRAFFIC REPORT

Trafficology has partnered with data experts Casino City Press to provide insight into website and traffic trends across the gaming industry. Following the frenzy of Fifa World Cup activity earlier this year, this month we take a look at the highest-ranked sports betting operator sites from around the world

OVERALL

AFRICA

ASIA

Rank	+/-	Name	Rank	+/-	Name	Rank	+/-	Name
1	-	Bet365 Sportsbook & Racebook	1	-	Bet9ja	1	-	Nesine.com
2	-	Caliente Sports	2	1 ▲	Bet365 Sportsbook & Racebook	2	1 ▲	Bet365 Sportsbook & Racebook
3	-	Unibet Sports & Racebook	3	1 ▼	SportPesa Kenya	3	1 ▼	Olimp
4	-	Pari-Match	4	-	BetIn Kenya	4	2 ▲	M88.com
5	-	Bet365 Spain Sportsbook & Racebook	5	2 ▲	PremierBet	5	-	VivaroBet
6	-	William Hill Sportsbook & Racebook	6	4 ▲	Hollywood Bets	6	2 ▼	Bilyoner
7	19 ▲	SportingBet UK	7	1 ▼	BetPawa	7	1 ▲	Marathon Bet
8	-	Hong Kong Jockey Club	8	4 ▲	Betway Ghana	8	1 ▼	Hong Kong Jockey Club
9	5 ▲	1xBet	9	6 ▲	Sports4Africa	9	6 ▲	Nextbet
10	3 ▲	Betfair Sportsbook & Racebook	10	1 ▼	Supabets	10	1 ▼	TotoGaming
11	2 ▼	Bet9ja	11	3 ▼	NairaBet	11	-	1xBet.KZ
12	7 ▲	Hollywood Bets	12	1 ▲	MerryBet	12	2 ▲	MaxBet
13	1 ▼	Sky Bet	13	4 ▲	Soccabet	13	1 ▼	Okooo.com
14	1 ▲	SportPesa Kenya	14	3 ▼	M-Bet	14	4 ▼	Tuttur
15	5 ▼	BetIn Kenya	15	1 ▼	Mybet Sportsbook	15	1 ▲	SBOBet
16	-	Bet365 - Italy	16	-	ZEturf	16	1 ▲	1xBet
17	10 ▼	Tipico Online Gaming	17	12 ▼	1xBet	17	2 ▲	500.com
18	2 ▼	Nesine.com	18	-	Tab Gold	18	2 ▲	Fun88
19	1 ▲	Favorit	19	4 ▲	Africa Bet Sportsbook	19	5 ▲	Winner.co.il
20	3 ▲	PMU	20	2 ▲	BetPawa Uganda	20	1 ▲	Dafabet



EUROPE



NORTH AMERICA



LATIN AMERICA

Rank	+/-	Name	Rank	+/-	Name	Rank	+/-	Name
1	-	Bet365 Sportsbook & Racebook	1	-	Bovada Sportsbook	1	-	Bet365 Sportsbook & Racebook
2	-	Pari-Match	2	-	Bet365 Sportsbook & Racebook	2	-	Caliente Sports
3	1 ▲	Marathon Bet	3	-	TVG	3	3 ▲	BetPlay
4	1 ▼	Betfair Sportsbook & Racebook	4	1 ▲	TwinSpires	4	-	Wplay.co
5	9 ▲	1xBet	5	1 ▼	Sports Interaction Sportsbook & Racebook	5	2 ▲	SportingBet UK
6	1 ▼	Favorit	6	120 ▲	5Dimes Casino and Sportsbook	6	1 ▼	Betfair Sportsbook & Racebook
7	5 ▲	Unibet Sports & Racebook	7	-	BetOnline Sports	7	4 ▼	Rivalo
8	1 ▼	PMU	8	1 ▲	HorsePlayer Interactive	8	1 ▲	InkaBet
9	3 ▼	Stoiximan	9	3 ▼	Nitrogen Sports	9	1 ▲	1xBet
10	12 ▲	Fonbet.ru	10	4 ▲	NYRA Bets	10	2 ▼	Aposta.La
11	-	William Hill Sportsbook & Racebook	11	3 ▼	SBOBet	11	-	Betsson Sportsbook
12	1 ▲	Crystalbet	12	-	Intertops Sportsbook	12	1 ▲	Bet365 Spain Sportsbook & Racebook
13	4 ▼	Bet365 Spain Sportsbook & Racebook	13	3 ▼	Bet9ja	13	1 ▼	ColBet
14	6 ▼	Tipico Online Gaming	14	1 ▼	Betway	14	2 ▲	Mijugada
15	3 ▲	Leader-Bet.com	15	10 ▲	Marathon Bet	15	8 ▲	IsaGaming
16	6 ▼	Tipsport	16	5 ▼	Sportsbook.ag	16	34 ▲	Bovada Sportsbook
17	47 ▲	Marathon Bet Russia	17	1 ▼	Hong Kong Jockey Club	17	2 ▼	188BET.com
18	1 ▲	Bwin Sportsbook & Racebook	18	361 ▲	Pinnacle	18	-	Betboo Brazil
19	4 ▲	BetCity	19	4 ▼	BetUS	19	18 ▲	Marathon Bet
20	3 ▼	Betano.com	20	-	BetAmerica	20	6 ▼	Codere.mx

Rankings are estimated using statistical data and should not be considered absolute ranking values. More than 40 complementary top lists are available on the iGamingDirectory.com website operated by Casino City Press



LISBON AFFILIATE CONFERENCE: WHAT YOU NEED TO KNOW

17-20 October
Feira Internacional de Lisboa (FIL), Portugal

ABOUT

After hosting successful conferences in London, Berlin and Amsterdam, iGB is moving to hotter terrains, taking the well-known affiliate show to Portugal's capital. The show will be hosted at the Feira Internacional de Lisboa, the city's premier venue for exhibitions and trade fairs. LIAC Event Director Shona O'Donnell said: "Our last three years in Berlin have been extremely successful, but we never like to rest on our laurels. Moving the event to Lisbon will allow us to bring in local affiliates from this region and we hope to bring back some that may have missed last year's BAC in Berlin. Finally, we hope it will bring us a little autumn sunshine."

With two conference rooms and a 100-exhibitor strong exhibition floor, the Lisbon Affiliate Conference will offer delegates a great opportunity to learn about the latest trends and opportunities in online gaming. The conference content will cover SEO, social media, regulation and compliance, emerging markets and technical SEO.

SCHEDULE

The first day primarily revolves around registration. On day two, there are a number of sessions that are ideal for affiliates old and new. In recent months, the value of social media and harnessing this marketing platform has been widely discussed. There are talks looking at influencer marketing, focusing on how affiliates can identify and leverage social influencers and how to find the right ones to promote your brand with instant results. Following this, a Facebook Focus seminar will seek to be the ultimate guide for gaming affiliates when driving a Facebook strategy. Day three hosts sessions such as: The status of GDPR and E-Privacy Regulation: An overview of the legal and compliance landscape;

The Impact of Cryptocurrencies, Blockchain and ICOs across the iGaming Space; Asia Pacific focus – maximising the potential of the fast-growing region; Pan European spotlight - changes in current marketing and advertising rules; and standards to foster responsible gaming. As with all iGB Affiliate shows, LIAC has got plenty of education opportunities for attendees to get their teeth stuck into.

NETWORKING

An iGB Affiliate conference would not be an iGB Affiliate Conference without ample networking events for attendees pre-event and at the show. The Lisbon Affiliate Conference guarantees to keep attendees busy from the moment they land in sunny Portugal. On the first night, there is an official welcome drinks party at the Sheraton Lisboa Hotel & Spa, sponsored by WPN Affiliates, which is the best place for attendees to pick up their badges early and meet their networks before the full conference kicks off. Later that night is the opening night networking party at the Silk Club, allowing you to celebrate your first night in Lisbon.

In addition to the networking breaks throughout the day at the conference, a UPayCard-sponsored official networking party will be the perfect way to end a busy day of business. Hosted at one of the city's most stylish clubs, Lisboa Rio, the party atmosphere gives you the opportunity to let loose on the dance floor or to continue your networking late into the night in one of the smaller rooms. Finally, on the last night of the event, the closing networking party at Level 8 Rooftop Bar will see you conclude several days of hard work in style.

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A PERFECT OPPORTUNITY FOR AFFILIATES

Intertops tells *Trafficology* what the operator is looking forward to at this year's Lisbon Affiliate Conference



What are you most looking forward to about LIAC?

Moving the event to Lisbon will give us the opportunity to meet up with local affiliates with whom we have yet to have personal contact. That will help us gain a deeper insight into the regulated Portuguese online gaming market, which grew by 8% during the first quarter of 2018, following growth in the online casino vertical.

What can affiliates expect to see at your stand?

Do you have any exciting presentations lined up during the show?

At Intertops, we are always looking to entertain our affiliates, and as always, there will be plenty of attractive and useful prizes to be won. I am sure our affiliates will be curious to know what's on offer at our stand #E51.

What are some of the main topics you think will be discussed by affiliates at the show?

As a result of the US Supreme Court striking down the Professional and Amateur Sports Protection Act, the recent legalisation of sports betting in New Jersey has been keeping affiliates busy. The coming months will show which states will follow New Jersey's lead and also what impact that will have on other verticals.

Why do you think events like the Lisbon Affiliate Conference are so important for the affiliate industry?

The modern digital world offers plenty of communication tools for meeting people wherever they are based. But this can never replace a face-to-face meeting, where operators sit down with affiliates to discuss both current and future topics, as well as participate in some productive brainstorming, either at the conference or even in a more private atmosphere at lunch or dinner.

Also, both operators and affiliates benefit from the speakers, who are the industry leaders and give crucial insights into trends and projections in the online gaming industry.

Finally, first-class networking events at affiliate conferences always combine business with pleasure.

What are some of the biggest challenges the affiliate industry is facing right now?

Competition in the affiliate industry is increasing by the day. The "good old times," where affiliates operated as one-man-shows, are long gone. Affiliates would just register domains and build websites with pretty content and graphics and were then able to refer thousands of players to operators.

Nowadays, search engines like Google, Bing or Yahoo have one clear objective: They simply want to meet the needs of their users as effectively as possible. Search engines implement new requirements with every single update, which mean affiliates can lose their rankings for key search-terms from one day to the next. SEO experts play a leading role in the affiliate industry these days, joining forces with investors to build companies of 50 or more employees. Those companies buy sites from other webmasters, who can no longer keep up with all the new requirements.

Also, with all the legal changes, compliance has become a major topic for the online gaming industry, for operators as well as affiliates.

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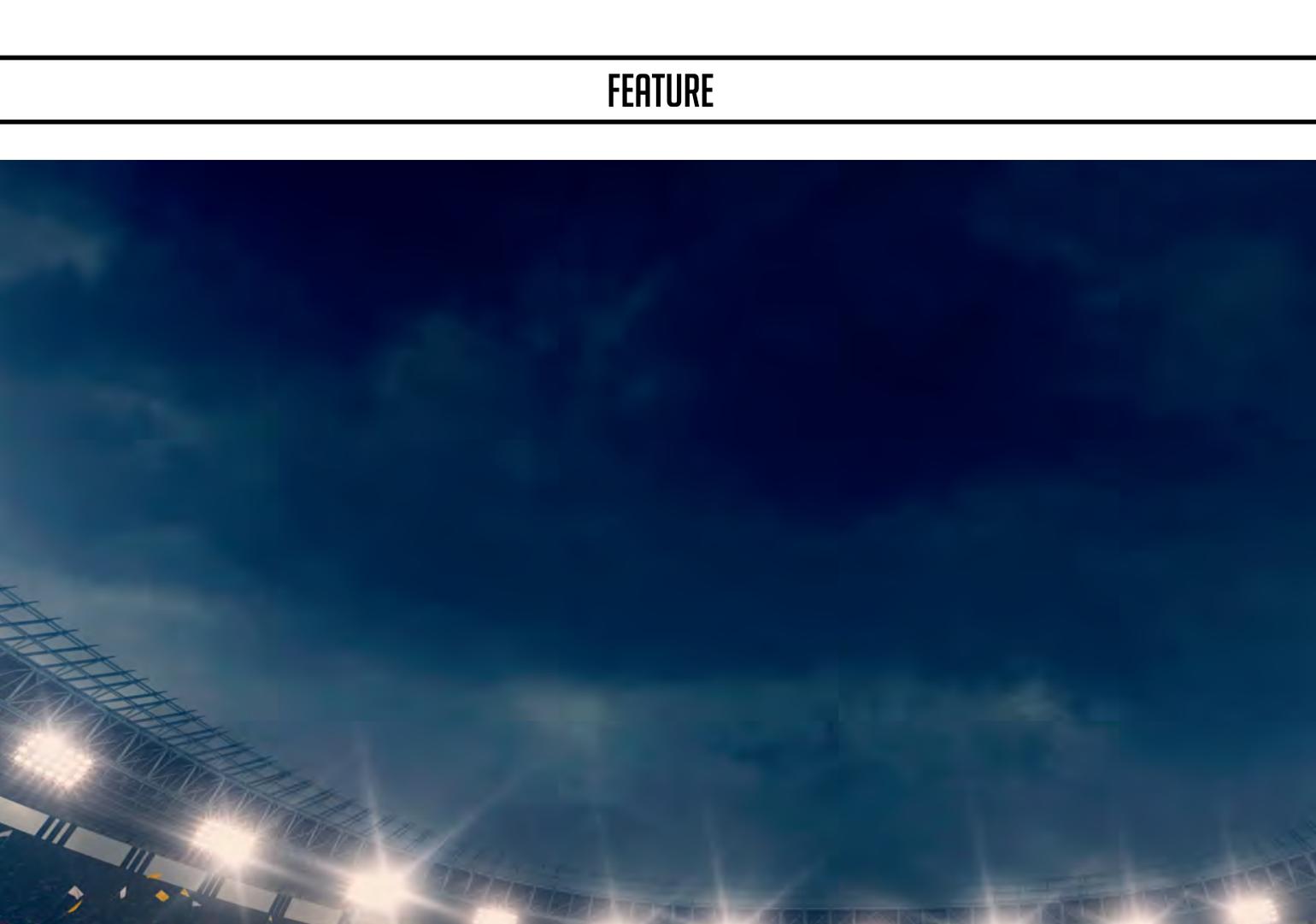
EXCL. Be the King

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2018 WINNER BEST CASINO AFFILIATE PROGRAM

 **LeoVegas** AFFILIATES



INTEGRITY BODIES: THE MISSING LINK FOR AFFILIATES?



Could affiliates be the missing link in helping to improve the integrity of sporting events? **Harrison Sayers** believes this is something worth looking at

On 2 August, Perform Group, a sports content and media company, entered into a landmark agreement with ESSA to become the first affiliate member to join the association. ESSA, a non-profit integrity body that represents "the sports betting integrity interests of many of the largest licensed and regulated betting operators in the world," offers its members the chance to share information surrounding suspicious betting patterns from gambling markets around the globe.

As the issue of integrity in sports betting becomes more prevalent, it remains to be seen what role other affiliates, including those more heavily associated with the gambling industry, can play in helping to prevent and report suspicious betting behaviour. Surely if a sports content provider can

help to spot suspicious betting behaviour, then affiliates can also be seen to play a part in keeping sports betting operations and the industry's image clean.

The European Commission recently endorsed the achievements of the Keep Crime Out Of Sport (KCOOS) project in February, which was co-financed by the European Union. The project's objectives included raising awareness of the Council of Europe's Convention on the Manipulation of Sports Competitions, proving the continent's commitment to stamp out suspicious sports betting. The fact that the European Commission has begun to tackle the problem is testament to growing industry concerns and the fact that larger organisations with various members, in this instance



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33 European countries, are better suited to tackle suspicious betting than individual groups.

Information sharing is an integral part of ensuring sports betting integrity, and few know this fact better than integrity bodies that rely on members having up-to-date information. Gambling affiliates could be added to the chain of companies that currently work as an early warning and detection system for integrity bodies such as ESSA.

IT IS UNDENIABLE THAT AS MORE SECTORS OF THE GAMING INDUSTRY TEAM UP AGAINST SUSPICIOUS BETTING, THE INTEGRITY OF SPORTING EVENTS WILL BE IMPROVED.



In the US, the question of strengthening the integrity of sports leagues following the US Supreme Court's decision to repeal the Professional and Amateur Sports Protection Act has been a key focal point of the American Gaming Association (AGA). The AGA argued that currently, new technologies make it easier to spot suspicious betting behaviour and even argued that the gaming industry supports "establishing a national data repository to share any suspicious betting information with law enforcement, gaming regulators and sporting bodies." It would be vital for this proposed national database to have all the possible sports betting information available to it, including data such as the location and demographics of bettors that affiliates could provide in certain instances.

So the question is: How can gambling affiliates help the gaming industry on its crusade against suspicious betting activity and how will they benefit from their commitment to integrity?

Khalid Ali, Secretary General of ESSA, stated: "Data has become an increasingly important part of the sporting

experience for consumers and that includes related betting activity. The inclusion of Perform and its globally recognised sports data business, which includes partnerships with major sports such as the WTA and La Liga, further enhances the interaction and mutual interest between our sectors in maintaining the integrity of sporting events."

Perform will therefore benefit from the increased data available made to them through ESSA and vice versa. To further increase the appeal for affiliates to become part of these integrity bodies associations, groups such as ESSA undertake due diligence processes, as well as ensuring its members adhere to their code of conduct. That means that once accepted into the integrity body, you can prove the legitimacy of your business to your customers as well as showing your commitment to upholding the integrity of sports betting, thus improving your affiliate's public image. There is also the benefit of being part of a large group of like-minded members who have also heavily invested in their own risk-management systems.

With regards to ESSA, all members share information with one another when they spot suspicious betting activity in any of their markets. This helps the members to respond quickly to any potential issues regarding suspicious betting activity. This could be useful for gambling affiliates who are hoping to avoid fraudulent bets and other criminal activity which could lead to compliance issues and large fines from regulatory bodies.

Jake Marsh, Head of Integrity Operations at Perform, stated: "Like ESSA, we live by a fundamental commitment to sport and betting integrity that is at the core of everything we do as a sports business. Perform works with a number of stakeholders on a 24/7 basis to share intelligence and advise of threats and our collaborative and not-for-profit approach is always the same and demonstrably effective. The ability of different sectors to effectively work together is critical to maintaining the integrity of sport, and we look forward to working closely with ESSA to protect sport and betting from manipulation."

It is undeniable that as more sectors of the gaming industry team up against suspicious betting, the integrity of sporting events will be improved. Integrity is vital for any healthy regulated gambling market as it increases consumer confidence and reduces the doubt of match fixing and other events that could affect bets. Many gambling affiliates are primarily concerned with their profits and therefore becoming part of an integrity body can easily be overlooked as an unnecessary complication for a small business.

However, as attitudes towards the gambling industry ebb and flow around the globe, it could become vital to their survival to prove their commitment to the rest of the gambling industry by helping to provide the data that they gather to help prevent suspicious betting activity. It is not to say that currently they do not help to prevent such activity, but they could help even more by becoming part of an integrity body such as ESSA.

As gambling affiliates are usually used as a means of operators to find a cheaper solution to finding new customers, as opposed to traditional marketing campaigns that can be more costly and less targeted, they already have large amounts of data on customers and their activities. If this data was added to the fold of integrity bodies such as ESSA, it could help to further prevent illegal and suspicious gambling activities. The ESSA stressed that their affiliate programme is still open to "non-betting operator business or organisation that shares the same values as ESSA and its members on integrity and betting issues." As a result, we could begin to see affiliates becoming more heavily involved with integrity bodies in the near future as they look to help curb suspicious betting activity and affirm their commitment to the gaming industry.



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CAN YOUTUBE PROVIDE A STREAM OF SUCCESS?

Oliver Rudgewick asks the industry how YouTube has benefited affiliates and the place it can hold in marketing campaigns

We all know the importance of social media to the affiliate industry; driving traffic to your site and keeping it there is the nature of the business. Social media has become a key marketing tool to do this, but more companies are looking to audio-visual formats like YouTube to open up their business to many more users.

YouTube has risen to prominence over the past 10 years to become a \$75bn company, with people spending six minutes a day on average on the site, according to Aegis Capital analyst Victor Anthony. This represents a great opportunity for affiliates and operators to diversify their content to appeal to a larger demographic.

Mark McGuinness, an online gaming expert and CMO of operator BetOlimp spoke to *Trafficology* on the importance of YouTube as a marketing platform.

He said: "Video marketing content production and distribution is one of the marketing channels to broaden the awareness of a brand's products and services. TV has always been considered

one of the 'Moments of Truth,' first coined by Procter and Gamble back in 2005. It's the moment whereby the consumer experiences a brand and could be influenced to buy that particular product or service.

"Therefore, video platforms such as YouTube, Vimeo and streaming destinations such as Twitch are extensions of mainstream TV consumption and as such are important communication channels to engage your consumers."

YouTube offers something different from the traditional forms of marketing, audio and visual elements that you can't incorporate as easily in other forms of social media, which can help to keep people engaged for longer.

As McGuinness explains: "In simple terms, it's all about the content. Content is king. For sure, if you look at the landscape, perhaps some content within the reality genre or car crash TV has been framed as not intellectually stimulating, nor challenging.

"But the fact of the matter is its entertaining, and consumers want to be entertained. Just look at the growth of e-learning and self-help videos available on YouTube. So the key is rather simple. Understand your audience and tailor your content or video that allows an experience interaction that combines entertainment and educates through some knowledge exchange."

There are two methods available to affiliates and operators. Firstly, setting up and running their own YouTube channel, this could be expert analysis, including match predictions and betting



GEORGE ELEK

forecasts similar to how Oddschecker utilises the format. It can also be used for more comedic content intended to entertain, like online challenges or viral content like Betway and Paddy Power provide.

The second method is advertising on pre-existing channels. This is commonly utilised by gambling operators. It's a trend that has become more prominent in recent years. These partnerships are usually on sports or esports channels, and allow for operators to get closer to their target market, and tailor to the interests of these people.

George Elek, Head of Media Relations at Oddschecker and Sam Eaton, Senior Manager Marketing, said: "With the growth of Facebook as a video platform, there has tended to be a preference to use that channel over Facebook, especially with their algorithms preferring videos rather than static images.

"However, due to the sheer amount of users and increase in vloggers, YouTube has lost its tag of being just a platform where young people consume video content, which has led to a growth in use in the gambling industry."

Ladbrokes has been by far and away the most active operator in working with content creators online. This football season, it is working with YouTube personality The True Geordie's Kick-Off show, which sees him watch a football match live and give insight and his opinions alongside a panel of guests. Ladbrokes also notably partnered with Arsenal Fan TV (now AFTV) for the 2017/18 season.

Trafficology spoke to Luke Nixon, Media Partnerships Manager at Ladbrokes Coral, on the importance of YouTube to operators.

Nixon said: "It really depends on the content. It's important not to be too present in the content if that's not what the viewers are accustomed to. As an example, working with Kick Off through Ball Street, a sports social media marketing specialist, the branding on the videos is quite subtle and Brian (True Geordie) does call out Ladbrokes every now and then, but it's all within context of a football show. This is important to us of course.

"I think first and foremost, YouTube is a branding exercise so you should not expect a direct response from it. It will definitely help in boosting brand recognition and consideration. That being said, if you can strike up a strong relationship with a channel, direct response marketing can play a big role, but it needs to feel organic, as opposed to a hard sell, such as banners."

YouTube sponsorships tend to work on being beneficial for both operator and content creator; this is because the YouTube personality gains the extra income from the operator, with the

operator gaining a larger audience, and a chance to push some of that audience to its site to wager. Special offers like free bets or promo odds can then be used if clicked through that certain link, or utilising a promo code.

As with any form of marketing, there are inherent challenges to YouTube as a marketing platform for affiliates and operators alike; from start-up costs and time frame, to value for money, and the ability to drive customers to the site.

Elek and Eaton highlight the expensive costs of setting up and maintaining high-quality productions to gain a larger audience. They said: "Having to grow an audience from scratch is difficult and can be expensive, with those who can help to promote your channel knowing the value of doing so, and charging accordingly."

Dixon highlights the difficulty of finding an audience. He says: "It is difficult to drive players to the content; you really need a strong presence across other social media platforms to be able to do this. Also, like anything, you need to understand your customer base and know what segments of customers fit the bill, then pushing the right material to those customers to nudge them in the right direction."

Looking forward, we asked whether YouTube could be used as a primary marketing source for affiliates. McGuinness said: "It's currently uncommon for affiliates to use YouTube as their main destination source. This will change as video production costs are falling and there is plenty of software to allow video content creation, upload and streaming.

"So as affiliates become more confident with the storyboarding and video creation and curation of their content, the likely trend is perhaps YouTube could become the primary source of content exchange with their existing and prospective audience."

Nixon sees YouTube's usage increasing in future alongside other marketing forms, saying: "In the near future, I'm not so sure, purely because the difference between spend is so great at the moment.



MARK MCGUINNESS

"However, we don't really have any one primary form; we have the main marketing campaigns which use many channels to get the message out there. At the moment, YouTube wouldn't be considered one of those main channels, but I do see that shifting, so ultimately it will play a bigger role in the marketing of big campaigns."

There is little doubt YouTube can help affiliates and operators appeal to a larger demographic, and the audio and visual medium helps to keep people there longer, which can be used to drive traffic effectively.

US STATES RIPE FOR PICKING

Harrison Sayers breaks down US opportunities for affiliates, assessing which types of content will suit individual markets



All anyone can talk about since the US Supreme Court's decision to repeal the Professional and Amateur Sports Protection Act on 14 May is the plethora of opportunities this will have for bookmakers. However, affiliates stand to gain just as much as their operator counterparts.

According to Nielsen Sports data, 44% of sports bettors are adults under the age of 35, as opposed to 31% of the general population, with 29% of bettors earning a household income of \$100,000, which is close to double the US average. To tap into this newly invigorated market of millennials and high household income families effectively, you can cater to their desires of increased sports content and odds comparison sites as they look to partake in the newly-offered gambling amenity.

Sara Slane, Senior Vice President of Public Affairs for the American Gaming Association, said: "Expanding access to legal sports betting will bring millennial audiences back to sports broadcasts and stadiums, which is a huge benefit for sport enterprises across the country. However, this potential will only be realised with proper policy frameworks that empower consumers with competitive odds, access to all bets and the ability to tap into modern platforms, including mobile."

Affiliates who are quick to establish themselves now in the states with sports betting policy frameworks could stand to make a name for themselves for years to come, without spending the vast fees which bookmakers will have to cough up to do the same. All you have to do is create unique content tailored towards the newly-



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regulated states' residents and tourists. The great opportunities in the US are therefore not for large established operators, but instead affiliates of all shapes and sizes who can provide content services for the new sports betting customers.

However, you must also consider all of the other opportunities in the country. That means you must look beyond sports betting before



determining which sort of affiliate you will be. Sports betting has helped to buoy the entire industry in the individual states that have already rolled out extensive expansions, as the amenity has helped to attract hotel guests and punters to all land-based operations which currently offer it.

It could be that there are currently greater opportunities in the growing hospitality segment of the gaming industry, or perhaps you are already an established football (soccer) content affiliate site looking to enter an area that doesn't care for the sport. Therefore, joining an expansive affiliate program such as the MGM Resorts International Affiliate Program could prove a more beneficial source of income through commission from hotel room bookings.

Being able to take advantage of emerging markets is risky business and so knowing your customers and the gambling landscape will be crucial to any US-focused affiliate. Establishing which state suits your affiliate site's content the best will help you to focus your offerings in order to engage in more localised marketing.

By looking at affiliates that are already operating within regulated sports betting markets, you can gain an understanding of what gaps there might currently be in individual markets. Perhaps creating an incredibly focused New Jersey Devils bet comparison site, or something broader but still niche, such as US motor sports content, could be your ticket in. Of course, as always, the first thing any affiliate should do is find the affiliate program which suits them best.

Which states offer the best opportunities?

It is always extremely important to know your market. There is no point setting up a soccer-based affiliate content site in a state that has no interest in the sport or a NASCAR odds comparison site based in New Jersey where the local interest is somewhat non-existent. For

the sake of argument, rather than evaluating each US state, we will focus on the ones which have already legalised and expanded their state's sports betting offerings.

NEW JERSEY:

Population: 9 million, 11th largest in the US

Median Household Income: \$68,357, 7th largest in the US

There are three online sportsbooks in the state currently available to players; two of which are apps operated by MGM Resorts and DraftKings, with the other being the first integrated online casino and sportsbook in the US - PlaySugarHouse.com. Other affiliate opportunities include potential affiliate programs with one of the nine casinos in the state, which are all located in Atlantic City. These could be tailored towards booking commission, or commission from sending customers to one of the properties' online casino sites. There are two major league hockey teams in the state; New Jersey Devils and Metropolitan Riveters. However, due to its close proximity to New York, it also hosts two NFL teams in its 82,500 capacity MetLife Stadium, the Jets and the Giants, and the New York Red Bulls in the MLS. Focusing on New Jersey offers affiliates plenty of options, from hotels, online casinos and sports betting. All of these potential affiliate sites and programs to join or establish are supported by destination gamblers in Atlantic City, a high household income, a large population, and large rich neighbouring states such as New York.

DELAWARE:

Population: 960,000, 45th largest in the US

Median Household Income: \$57,756, 24th largest in the US

There are only three major gaming properties in the state, focusing on horseracing. They raised \$8m from 25 June to 29 July, according to the Delaware State Lottery. Over \$5.8m of that total was raised by Delaware Park, with its close proximity to Pennsylvania given as the primary reason for its success. The state might be small, but its proximity to other richer and more populous states could help to springboard any established affiliates if and when its neighbours laws change. All three of the land-based casino properties also offer online casinos.

NEVADA:

Population: 2.99 million, 33rd largest in the US

Median Household Income: \$52,008, 34th largest in the US

According to the Nevada Gaming Control Board, as of January 2017, there are 334 casinos in the state. Home to both Reno and Las Vegas, there are countless integrated resort affiliate programs to become a part of. In terms of sports betting, the state has the most established market presence, again offering numerous affiliate program options. The only problem with Nevada is the fact that competition in the state is the fiercest and it is home to other well-established affiliate sites and programs. Typically, some of the most successful affiliate sites in the state are those which review new slots and other casino innovations.

MISSISSIPPI:

Population: 2.98 million, 34th largest in the US

Median Household Income: \$40,037, 51st largest in the US

The only state in the south to currently offer legalised sports betting, this could be the perfect place to establish affiliate-based content focused on the region's favourite sports, including American football, NASCAR and baseball. A potential downfall is the fact college sports betting is still banned, which could further reduce interest in sports betting, considering the state's most supported teams are college ones, such as the Ole Miss American football team. Affiliates looking to create a sports-content-based site could find a large following from the state's avid sports fans. There are around 40 casinos in the state, including three tribal casinos. Another issue to be aware of is the large religious conservative population in the state and its neighbouring jurisdictions who are strongly opposed to gambling.

ADVERTISING CONTINUES TO FACE BACKLASH



Jake Patel looks into the controversy caused by gambling advertising in Western Europe, and the issue of future regulation

With gambling advertising regulation constantly changing, it can sometimes be hard to keep track of everything that is happening.

ITALY

The first and most drastic change that the industry will face is the implementation of a blanket ban on gambling advertising across TV, internet and radio in Italy. However, the state run lottery and its products will be exempt from the ban.

The advertising ban was passed by Italian parliament on 7 August, with 155 votes in favour and 125 votes against.

The ban came packaged with the "Dignity Decree," which was proposed by Deputy Prime Minister and leader of the populist Five Star Movement, Luigi Di Maio, in June.

The ban will come into effect on 1 January 2019 and advertising deals that were agreed before the enactment of the ban can remain in place until July.

Giulio Coraggio, a technology, privacy and gambling lawyer at DLA Piper in Italy, told *Trafficology*: "Operators will challenge the

ban before the European Commission, as well as Italian and European courts, since the ban is in breach of EU laws and of the Italian Constitution.

"At the same time, I expect that operators will become creative to find new ways of promoting their services, relying on a law that is poorly drafted."

Not only does this stand to have an impact on the gambling industry, but this also spells bad news for other sectors, including sports teams, gambling law firms and of course affiliate advertisers.

Coraggio said: "My hope, and what we are working on, is to have the ban cancelled by the European and Italian authorities as soon as possible. At the same time, it should be considered that a potential change in the government might help the replacement of the ban with a more sensible regime."

Maurizio Gigante, an affiliate and performance marketing consultant, told *Trafficology* that very few affiliate companies operating in Italy are thinking of closing.

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Gigante said: "Most are waiting to read the final text of the law to understand how to defend themselves. Some affiliates are thinking to go back to the dot com illegal environment or to start working outside of Italy.

"The big affiliates will be in more danger because the fear of seeing their websites closed will force them to resize."

This ad ban has been incredibly unpopular and many people in the industry doubt it will catch on in other European countries.

Coraggio has described this ban as "an illegal measure that will lead to major disputes."

UK gambling consultant Steve Donoughue told *Trafficology* that the ad ban is "utter lunacy"

Donoughue went on to say: "This is where we will be if we have a Corbyn government, as he shares the same populist Trumpian approach of the Italian government. I suspect under Corbyn it could go even further, such as nationalisation."

IRELAND

A few days before Italy announced it would be outlawing gambling adverts, Ireland's President, Michael D. Higgins, had also called for gambling advertising in sport to be banned.

In a radio interview on RTÉ Radio 1's Sunday Sport, Higgins said: "If I had my way, I wouldn't have advertising of any access to gambling platforms in sport at all.

"I just think sport should be protected from it. There is no one being heavy about it. What you can do is through education obviously, through the school systems."

Although the role of President in Ireland is more ceremonial than anything else, it is possible that Higgins may be able to sway politicians and eventually convince them to ban gambling advertising during sports events.

But it may take a while to get the ball rolling, especially when you consider Ireland has spent the last five years working on the Gambling Control Bill, which is still unfinished.

In reference to Higgins' comments, Donoughue said: "This is why we have a constitutional monarch and not some unheard of politician living out their dotage making comments on things they know nothing about."

The Gambling Control Bill is intended to cover several areas of the gambling sector in Ireland, including advertising restrictions.

The Football Association of Ireland (FAI) is exploring the possibility of terminating sponsorship agreements with gambling companies.

This is mainly due to concerns about the levels of gambling addiction that is present in both gamblers and sports enthusiasts.

**"THERE WERE A LOT OF BETTING
ADVERTS DURING THE WORLD CUP.
BUT IT'S THE WORLD CUP."
STEVE DONOUGHUE**

In August, an FAI spokesperson told *The Times* there is work going on "behind the scenes right now" and that an announcement should be expected soon.

Donoughue said: "This would not surprise me, as this is the way the narrative is going.

"Gambling is seen as toxic and the industry really must make some big gestures to change that."

GREAT BRITAIN

The Gambling Commission recently unveiled plans to implement tougher repercussions for companies that breach advertising and consumer law, which will come into effect from 31 October.

The regulator can only issue fines for misleading advertising at present.

Once the new rules come into effect, it will be much easier for the Commission to take legal action against companies that advertise in a way that appeals to children or makes gambling look glamorous.

Gambling operators that advertise through third-party affiliates will also be accountable if the affiliates are found to be in breach of advertising and consumer laws.

It will also be possible to take legal action against gambling companies that use spam marketing emails and text messages.

In reference to this, Matt Wilson, Senior Media Relations Officer at the Advertising Standards Authority (ASA), told *Trafficology*: "This helpfully formalises the position that advertisers must stick to the rules and is an effective demonstration of joined-up regulation."

Donoughue said: "You can't argue with any of it, as all it's doing is strengthening existing codes.

"Where there is the potential for problems is that the terminology used by the Commission is considered by some to be too broad and thus liable to trip people up in their interpretation."

Shortly after the FIFA World Cup, the body was flooded with complaints due to just how many gambling adverts were broadcast during matches, with operators Bet365, William Hill and Coral named in most of the complaints.

Wilson said: "Our new guidance introduced earlier this year restricts gambling ads that create an inappropriate sense of urgency, clamps down on ads that encourage repetitive play and provides more detail on vulnerable groups like problem gamblers that marketers need to work to protect.

"We're currently assessing several ads that appeared during the World Cup to establish if any further action needs to be taken. We do not regulate the number of times ads can appear, and this includes gambling ads."

Donoughue argues the ASA "was bound to investigate the amount of World Cup betting adverts due to highly motivated militant problem gamblers willing to complain about anything the industry does.

"There were a lot of betting adverts during the World Cup. But it's the World Cup. A lot of people bet on it. You get a lot of adverts for incontinence pants during the breaks for Poirot and Poundland adverts during the breaks for Jeremy Kyle. It's what the advertisers know their audience wants."

MOVING FORWARD

According to Wilson, it is "difficult to tell" just how much gambling advertising can change in the future.

He said: "New technologies will always emerge and provide platforms and opportunities to reach legitimate audiences in new and innovative ways. As advertisers, it's their job to ensure in doing so they continue to prepare their ads responsibly and target them appropriately."

This is an industry that comes under fire from many different pressure groups, activists, politicians and opinion leaders, so there is no telling what could happen for sure.

Donoughue argues that there are individuals and groups that want to see the "tobacco-isation of gambling, with a complete ban on all advertising and stronger restrictions on access in the mistaken belief that gambling is as harmful to everyone as tobacco is.

"This belief is usually motivated by commercial interests; such as wanting the remote sector to be the bête noire to distract from land-based failings or the need for research grants or newspaper headlines or just to exercise their redirected addiction."

As Wilson said: "The gambling sector should be under no illusion that threats to its advertising freedoms are ever far away."



VIDEOSLOTS: GROWING AS A TEAM

The **Videoslots** affiliate team discuss plans for future growth in a competitive and changing market

SARA LANTZ - Junior Affiliate Manager

LINDA CASH - Affiliate Manager

PHILIP KÅRSJÖ - Senior Affiliate Manager

MILES (MYRON) SAACKS - Head of Affiliates

KIM LINDSJÖ - Senior Affiliate Manager

What first attracted you to the affiliate industry?

SL: I actually started my Videoslots career working in another department. But I sat near the affiliate team and the togetherness they showed both inside and outside of

the office was clear for everybody to see. I eventually made the move to become a junior affiliate manager having chatted and interacted with the team as often as possible and I couldn't have envisaged the move going any better. There is such a positive vibe between colleagues and I love the travel opportunities.

LC: I love the innovative side of the online gaming industry so working at Videoslots was the perfect opportunity for me. The affiliate side of the business offers a unique approach to their clients and the interactions they have daily with their customers. A happy affiliate makes for a better working partner and that remains the same with the staff, with Head of Affiliates Miles always willing to trust his team and always on hand for advice and help. The work-life balance is another perk of the job, with management happy for employers to choose their own hours as long as it doesn't affect work.

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What are some of the main challenges affiliates face when it comes to the content they create and publish?

PK: For affiliates to be successful in today's highly competitive marketplace, they need to be able to produce relevant, quality content on a regular basis, but it's not as easy as it sounds. The ideal scenario for affiliates is to have a constant stream of content available to readers, dealing with subjects including industry issues and solving problems. While regular content is always necessary, it's important to produce it in a way that allows you to control the quality, therefore ensuring the engagement of the reader and the target audience.

MS: The most frequent challenge affiliates face regarding content is to find the balance between quality and quantity. There always need to be a certain amount of content produced, but we have to ensure it's engaging for the reader. That's why we put a lot of effort into ensuring our team fully understands the target audience, whether it's their needs, behavioural tendencies or even the languages catered for. It is crucial affiliates find ways to gain insights into their target segment and understand its characteristics to have a successful content strategy.

How has the affiliate industry changed in the past 12 months?

KL: It has been a really busy year full of change, we have put a lot of time and effort into working with affiliates to ensure their content and the way they advertise our offerings is in line with the regulator in order to stay within the laws. The shift towards compliance and regulation has been a big topic for us this year.



What do you think will be the most significant developments in the affiliate space in the coming years?

LC: The most successful affiliates always market through the most popular channels. Traditionally, this has been through written content, but now I believe we are seeing more and more people move to video, and I think this trend will continue and become a larger role in affiliate marketing.

PK: Affiliates are going to need to start taking advantage of the opportunities that will come from using influential marketers to build brand relationships with customers. Channels like Instagram, Twitch and many others will all add value to our industry this year, and it is important that we are the first to react so that we stay one step ahead of our rivals.

What are Videoslots' targets for the next 12 months?

KL: With the investment being made in new gamification products, I can see Videoslots' growth continuing, especially as we begin to build in new markets such as Italy. We will also be putting in licence applications for Sweden and Denmark, so it's important we continue to do everything right as we look to build on our already impressive growth.

MS: Videoslots is more than just a job to me; it's a second family and one that we want to keep adding to. It's a really exciting time to be a member of the team as we look to work and grow in new markets and I fully believe we will be a top ten brand globally in the not-too-distant future. I am also excited about the improvements we will be making to our affiliate platform. The Videoslots adventure has a long way to go and who knows, maybe one day I will be sitting in the US managing a local office.

**"THE MOST FREQUENT CHALLENGE AFFILIATES FACE REGARDING CONTENT IS TO FIND THE BALANCE BETWEEN QUALITY AND QUANTITY."
MILES (MYRON) SACKS**

MS: For me, it was how GDPR and the changes related to this have completely reset operator- affiliate relationships and how strict the Gambling Commission have been in enforcing their rules, as far as regulatory requirements go. The fines handed out to those failing to reach these demands have been eye-watering, so it has been a top priority to educate affiliates and keep them well up to date and informed about any changes in order to help our partnerships push forward for the better.



IF YOU COULD GO TO ANY EVENT THIS YEAR, WHICH WOULD IT BE?

That's easy. I live for festivals and love to put together the best, no, the most outstanding outfits, so for me Burning Man is the dream. It's not your usual event, but a temporary metropolis created in the Nevada desert in the US. It's an event dedicated to community, art and self-expression. Also, it's happening right now, so you can imagine how sad I feel missing out on it.

IS THERE A TV SERIES THAT YOU HAVE BINGE-WATCHED?

To be honest, I'm more of a "waiting for the new episode" week-by-week person. But I wish I had more time for binge-watching. Years ago, when I was temporarily unemployed after having moved to Malta, I watched every episode of "How I Met Your Mother" in a single week. I didn't get up from the sofa at all. It was honestly a bit depressing, but what an achievement, right?

CAN YOU NAME A BOOK OR A FILM THAT HAS POSITIVELY IMPACTED ON YOUR LIFE?

Wild with Reese Witherspoon is a movie I've watched a few times, which I don't do often. The movie is based on a book by Cheryl Strayed and is incredibly inspiring. Reese Witherspoon plays a very encouraging and powerful female role. In the movie, she hikes a thousand miles alone, fighting against all odds. I tend to associate myself with a character when watching a movie or a TV show, so I did play with the idea of forcing myself into something life-changing. By the way, I did go solo backpacking in Southeast Asia earlier this year. I'm not saying it was because of this movie, but it might have been!

PLAY HARD

Tünde Nyársik, Affiliate Manager at Jackpotjoy Group, tells *Trafficology* what she enjoys outside her work day

IF YOU COULD TRAVEL ANYWHERE IN THE WORLD FOR AN ALL-EXPENSES-PAID HOLIDAY, WHERE WOULD IT BE?

That's a difficult one. Travelling is my number one obsession and I'm on a mission to see the world. That's not so easy to manage with work, but so far so good. If I were to win a free trip, honestly, I don't even know where I would start. I've seen quite a lot of Asia now, so I would probably head to South America this time and explore a few countries there, but don't ask me to choose – it's too much pressure!

WHAT PIECE OF TECHNOLOGY COULD YOU NOT LIVE WITHOUT?

Oh, I'm such a "trapped in social media" girl. But I love it! Therefore, the thing I will always need by my side is a mobile phone with all its functions – but most importantly fast internet and a good camera. I put a lot of effort into taking, editing and sharing my pictures with the world. For me, it's all about capturing the moment. Some may say I'm obsessed with my photos, and they might be right, but isn't it cool to scroll through your camera roll years after a trip? Memories might fade, but pictures are forever.

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

Teleportation. We waste so much time running from one place to another! I'm not even going to mention the time spent at the airports and in aeroplanes. I really just want to clap my hands and find myself in Bali. Is that too much to ask?

WOULD YOU RATHER FIGHT A HORSE-SIZED DUCK OR 12 DUCK-SIZED HORSES?

I love animals, especially the fluffy ones. I really wouldn't want to fight either of them. Can I just pet and cuddle them instead?

IF YOU COULD GIVE YOUR YOUNGER SELF ONE PIECE OF ADVICE WHAT WOULD IT BE?

I have two actually. First, to pick a different university and study marketing. I have a degree in land surveying, which I'm not making much use of right now. Second, to get on a plane earlier. My very first flight was to Malta at age 24. Can you see how much traveling I missed out on? But everyone keeps calm. I'm catching up now!



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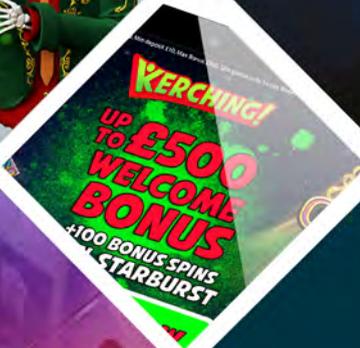
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