

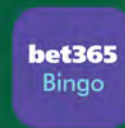
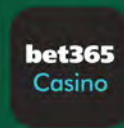
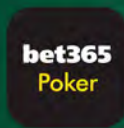
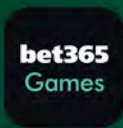
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Marketing & affiliate focus by *Gambling Insider*

FEBRUARY 2021

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FEBRUARY 2021

INSIDE:

iGaming futurologist Mark McGuinness on digital entertainment-based gaming

Great.com's Erik Bergman speaks about how to build a social CSR presence

PlayAttack's Helmet Guy outlines the best ways to stand out from the crowd

Cian Nugent's thoughts on being RAiG chairman and the 2005 Gambling Act review

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TRAFFIC REPORT

Trafficology has partnered with data experts Casino City Press to provide insight into website and traffic trends across the gaming industry. In this edition, we review affiliate programmes globally in 2020. The below is a breakdown of the top 10 sites by vertical including overall, casino, sports and poker across mobile (phones and tablets), as well as overall, casino, sports and poker across desktop



OVERALL (MOBILE)

Rank	Name	Website
1	bet365 Affiliates	www.bet365affiliates.com
2	NetHive Affiliate Program	www.nethive.com
3	Entain Partners	www.entainpartners.com
4	betway Partners Africa	www.betwaypartnersafrica.com
5	AfiliadosW	afiliadosw.co
6	Best Partners	www.bestpartners.com
7	Kindred Affiliates	www.kindredaffiliates.com
8	Euro Partners	www.europartners.com
9	Betfair Partnerships	affiliates.betfair.com
10	Bovada Affiliate Program	www.bovada.lv/new-bovada-affiliate-program

CASINO (MOBILE)

Rank	Name	Website
1	Gamesys Group Partners	www.gamesysgrouppartners.com
2	Euro Partners	www.europartners.com
3	WinBet Affiliates	winbetaffiliates.bg
4	PlayAmo Partners	playamopartners.com
5	U-ffiliates	www.uffiliates.com
6	Entain Partners	www.entainpartners.com
7	Buffalo Partners	www.buffalopartners.com
8	bet365 Affiliates	www.bet365affiliates.com
9	LeoVegas Affiliate	www.leovegasaffiliates.com
10	William Hill Affiliates	affiliates.williamhill.com

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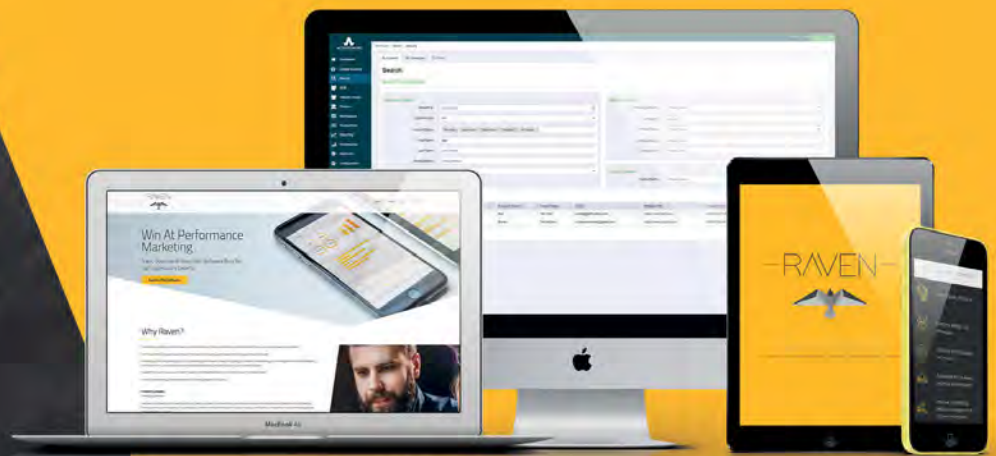
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For more information, **contact Adam Rowley**, General Manager:

☎ 07799 898175

✉ adam@raventrack.com



www.raventrack.com

SPORTS (MOBILE)

Rank	Name	Website
1	NetHive Affiliate Program	www.nethive.com
2	bet365 Affiliates	www.bet365affiliates.com
3	betway Partners Africa	www.betwaypartnersafrica.com
4	AfliadosW	afliadosw.co
5	Entain Partners	www.ertainpartners.com
6	Best Partners	www.bestpartners.com
7	Bovada Affiliate Program	www.bovada.lv/new-bovada-affiliate-program
8	Betfair Partnerships	affiliates.betfair.com
9	Tipsport Partners	www.tipsport.cz/partner
10	Kindred Affiliates	www.kindredaffiliates.com

POKER (MOBILE)

Rank	Name	Website
1	Stars Affiliate Club	www.starsaffiliateclub.com
2	WPN Affiliates	www.wpnaffiliates.com
3	U-affiliates	www.uffiliates.com
4	Winamax Affiliates	www.winamax.fr/en/affiliates
5	Entain Partners	www.ertainpartners.com
6	bet365 Affiliates	www.bet365affiliates.com
7	The Spartan Poker Affiliate Program	www.thespartanpoker.com/affiliate/overview.html
8	GGPartners	en.ggpoker.com/partners/affiliate-program/
9	CommissionKings	commissionkings.ag
10	Royal Stakes	www.royalstakes.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.

OVERALL (DESKTOP)

Rank	Name	Website
1	bet365 Affiliates	www.bet365affiliates.com
2	IQ Option Affiliate	affiliate.iqoption.com
3	eToro Partners	www.etoropartners.com
4	Yahoo Fantasy Sports Affiliates	sports.yahoo.com/dailyfantasy/affiliates
5	Betfair Partnerships	affiliates.betfair.com
6	Entain Partners	www.entainpartners.com
7	NetHive Affiliate Program	www.nethive.com
8	Kindred Affiliates	www.kindredaffiliates.com
9	Best Partners	www.bestpartners.com
10	DraftKings Affiliates	www.draftkings.com/affiliates

CASINO (DESKTOP)

Rank	Name	Website
1	Gamesys Group Partners	www.gamesysgrouppartners.com
2	Betsson Group Affiliates	www.betssongroupaffiliates.com
3	WinBet Affiliates	winbetaffiliates.bg
4	LeoVegas Affiliate	www.leovegasaffiliates.com
5	Stakes Affiliates	affiliates.stakes.com
6	Entain Partners	www.entainpartners.com
7	U-affiliates	www.uffiliates.com
8	Kindred Affiliates	www.kindredaffiliates.com
9	Videoslots Affiliate Program	partner.videoslots.com
10	Wildz Affiliates	wildzaffiliates.com

SPORTS (DESKTOP)

Rank	Name	Website
1	bet365 Affiliates	www.bet365affiliates.com
2	Betfair Partnerships	affiliates.betfair.com
3	NetHive Affiliate Program	www.nethive.com
4	Entain Partners	www.entainpartners.com
5	Best Partners	www.bestpartners.com
6	Stoiximan.gr Affiliates	affiliates.betano.com
7	Kindred Affiliates	www.kindredaffiliates.com
8	Bovada Affiliate Program	www.bovada.lv/new-bovada-affiliate-program
9	AfiliadosW	afiliadosw.co
10	Tipsport Partners	www.tipsport.cz/partner

POKER (DESKTOP)

Rank	Name	Website
1	WPN Affiliates	www.wpnaffiliates.com
2	Stars Affiliate Club	www.starsaffiliateclub.com
3	Winamax Affiliates	www.winamax.fr/en/affiliates
4	Entain Partners	www.entainpartners.com
5	U-affiliates	www.uffiliates.com
6	CommissionKings	commissionkings.ag
7	GGPartners	en.ggpoker.com/partners/affiliate-program/
8	bet365 Affiliates	www.bet365affiliates.com
9	Shen Affiliates	www.shenaffiliates.com
10	The Spartan Poker Affiliate Program	www.thespartanpoker.com/affiliate/overview.html



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HOW WILL THE UK GAMBLING REVIEW AFFECT AFFILIATES?

Iqbal Johal, Tim Poole and Peter Lynch consider varying and contrasting viewpoints on the review of the 2005 Gambling Act as the government reassesses concerns surrounding regulation, digitalisation and advertising

IQBAL JOHAL

It's hard to argue against the fact the time has come for an immediate review and amendment of the 2005 Gambling Act. I believe most of those in the industry will agree that certain regulations need to be tightened to ensure the UK market adheres to responsible gambling measures in the best way possible. Certain measures and proposals make sense. The decision to raise the National Lottery minimum age to 18 will help protect young people. And as my colleague Tim Poole alluded to, VIP and high-value schemes certainly seem outdated, and many would be happy if these were either abolished completely or heavily regulated, even if it will undoubtedly hit affiliate revenue, which in itself raises a moral dilemma of revenue coming from what in certain cases can be open to exploitation.

The review will also look at online stake limits, which could follow in the footsteps of the £2 (\$2.73) stake limit for fixed-odds

betting terminals (FOBT) that came into effect in April 2019. The biggest debate here is greater control and focus on player loss and deposit limits, making sure people play within their means, rather than restrict stakes for everyone since each customer is different.

Reducing online stake limits will have the biggest impact on the industry, particularly with affiliates, and will cut off another revenue stream for them. It will potentially see fewer bets placed as it could discourage players from playing if they think it's not worth the hassle with the financial returns undoubtedly reduced. There must be a compromise here if stakes are reduced, making sure it's a reasonable limit, rather than something similar to the FOBT reduction.

Restrictions on gambling marketing and advertisement have been discussed at length for several years now across the industry. Many countries in Europe, such as Spain and Sweden, have gone down the route of heavy advertisement restrictions for

operators and affiliates, with Italy banning it altogether.

The industry has already taken great strides to reduce exposure of gambling advertisement to young and vulnerable people, with the voluntary whistle-to-whistle advertising ban coming into force in August 2019, prohibiting gambling adverts from being shown on television during live sport before the 9pm watershed lasting from five minutes before the start of a match and ending five minutes later. Of course, many would argue the industry could go further, which is true, but does not have to be a draconian blanket ban, which is being mooted by several committees, including the All Party Parliamentary Group (APPG). This doesn't seem the right move and will obviously have ever-lasting effects for affiliates advertising online through social media, and might lead to a rise in black market activity.

Then there's also talk about following Spain with the banning of gambling operators from sponsoring sports teams. Again, this is a heavily debated topic but arguably such sponsorship does more good than harm when it comes to the sports industry, when you take into account the amount of funding operators provide to football clubs in the UK, which the Betting and Gaming Council (BGC) estimates at £40m a year to English Football League (EFL) clubs.

Former Interwetten speaker of the board Dominic Beier told *Gambling Insider* last autumn that such advertising is justified with sports fans the main target group for operators, especially when it provides crucial funds to teams and leagues, as well as working with them to promote responsible gambling messages. Much like an advertising ban, operators and affiliates would be heavily impacted if a sponsorship prohibition was implemented, which would arguably damage the UK market with a mass exodus.

A sensible and concerted collaboration between the government and gambling industry stakeholders is needed to provide a compromise on any regulatory measures that are implemented from the review, to avoid leaving catastrophic consequences to operators, affiliates and, indeed, the punter.

PETER LYNCH

The ongoing coronavirus pandemic has dominated much of the talk in the global gaming industry in recent months, and will continue to do so. But its prominence in the UK gaming industry has been rivalled by the talk surrounding the 2005 Gambling Act review, which in itself is a major story for suppliers and operators who have largely welcomed the review, but at the same time have warned of its potential implications for themselves and for their customers.

The review may have been in place for quite some time, but recent events involving the pandemic have most certainly accelerated its launch, particularly given the fact that many customers have now turned to online gambling due to the closures of land-based venues. Various issues and sectors will be analysed in detail during the review, but major areas that look set for change include marketing, advertising and sponsorships. Whether it will be minimal changes or vast changes remains to be seen.

One thing that can be said with a fair degree of certainty, however, is that big changes will be made. That means marketing and advertising companies should brace for dramatic adjustments, primarily because of the support behind the review, with more than 50 MPs and peers backing stricter regulations, but also because of just how damaging even a slight change in legislation could be.

Take the football industry for example, where half of the 20 teams in the English Premier League benefit from gambling brands as a main or sleeve sponsor for the current season. Both major and minor betting firms are heavily involved in the sport, and enjoy a mutual relationship with the clubs they sponsor.

The issue is elevated in the competitions beneath the Premier League, with the English Football League recently reinforcing their need for gambling firms for survival, stating that over £40m per season is paid by the sector to the league and its clubs. A review of the Gambling Act, therefore, may have just come at the worst possible time.

But while gambling firms remain in the dark about what to expect when the review is complete, perhaps the period from now until then will provide sufficient time for affiliates to get their house in order. And that would involve affiliates being able to have their voices heard, as explained by Cian Nugent, who was recently appointed as Responsible Affiliates in Gambling chairman. Speaking to *Gambling Insider*, Nugent explained how affiliates can play their part amid the "inevitable" Gambling Act review.

"It's very difficult to say where this will end up, and obviously the Gambling Commission is consulting on affordability measures separately. However, I do think the framing of the terms of reference and call for evidence in [the Gambling Act review] is encouraging. The opportunity is there for affiliates to explain the important role we play in the gambling ecosystem, as well as the key part we can play at the forefront of promoting safer gambling and the channeling of players to regulated operators."

Safer gambling is, of course, one of the central points of interest within the review. But that again is another contentious issue, with the Betting and Gaming Council arguing that stricter regulations could lead to an increase in betting sites with no regard for

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customer safety. But the Department for Digital, Culture, Media & Sport have reportedly suggested that additional finances will be provided to combat the problem.

It seems then that for every complaint raised by the industry, the government is ready and waiting with a response. But a war of words certainly won't help affiliates in the long run, and so a healthy discussion is undoubtedly what is required in order to bring about a successful outcome.

TIM POOLE

The UK market, a leader in terms of revenue generation and market size, has in many ways become the yardstick for regulated gambling markets globally. Although it's easier now to gain a Gambling Commission licence than it once was, it's as difficult as ever to do something with it and make your mark in such a competitive marketplace. As such, ever-growing attention has been drawn to how UK gambling companies market their brands, what technology they innovate with and not least how the market is being regulated.

For years now, the latter point has dominated discussion as the Gambling Commission and the UK Government look further into the practices of gambling operators. Some think the Commission actually isn't hard enough on operators, with some even questioning its fining process; fines are often paid straight to gambling charities, which work closely with said operators. Nevertheless, there is a strong anti-gambling lobby in the UK and it will come as no surprise to many that this lobby is pushing for maximum restrictions in the upcoming review of the Gambling Act 2005.

How will this affect affiliates? I would actually argue very marginally, if at all. Let's assume the gambling review will be implemented in its most restrictive and least free market form, which is far from a given. This would likely mainly target VIP, high-value players and safer gambling practices among operators. In other words, anything operators were doing wrong – malpractice that on paper wouldn't form part of their core

business models anyway – will be clamped down on. That won't necessarily mean anything for affiliates.

If VIP schemes are abolished, for example, and more scrutiny given to high-value players, yes affiliate revenues will be affected. But in the UK, for a large number of affiliates, it's already about a mass-market approach. Millions will have a flutter on weekend sport and many will have a casual go on online casinos. This will still be as strong a revenue generator for affiliates as ever. What is being discussed most now is the introduction of affordability, whereby players have to prove they can afford what they are betting.

Naturally, this will have its biggest knock-on effect when it comes to larger-spending players. This may certainly cause some bumps in the road in terms of players switching off and thinking it's not worth the hassle to go through a load of verification to place a simple bet. Players who can't afford to spend huge sums will also be stopped from doing so, stripping both the operator and affiliate of that revenue. But that in itself is a good thing, encouraging a more sustainable business for both affiliates and operators.

Will agreements between affiliates and operator brands have to be tweaked if affordability plays a larger role in the gambling process? It's a possibility but not one that would truly impact the heart of the operator-affiliate relationship. I'll put it this way: if an affiliate brand is already licensed in the UK market, following all the rules it's supposed to in terms of marketing and responsible gambling, the impending gambling review won't affect it in any way. If an affiliate is already constantly in breach of regulations and is non-compliant, the review may simply bring this more into the spotlight.

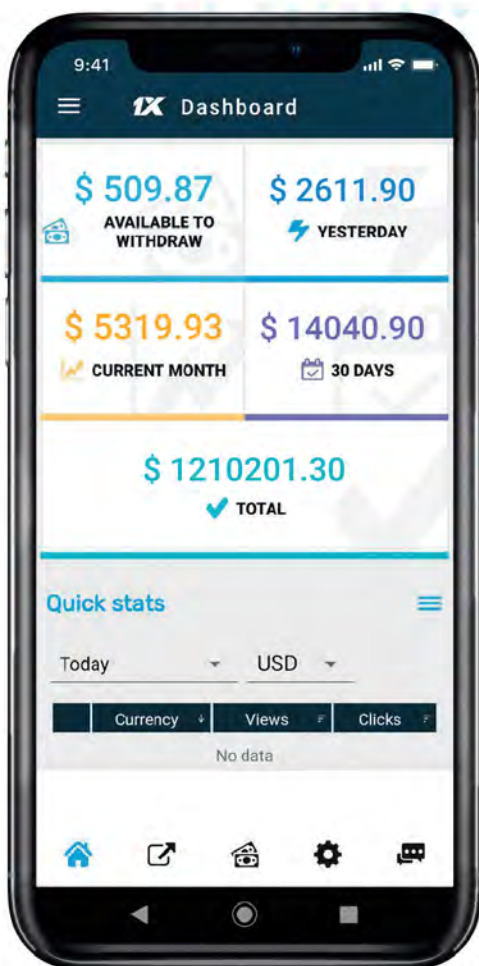
So while the gambling review is a hot topic in the UK, which will be sure to dominate column inches over the next few months, its impact on affiliate and marketing practices should ultimately be minimal. Yes, depending on what measures are announced, the gambling model may have to switch somewhat away from high-value or VIP players. But again, this should arguably change very little for affiliates practices. If players have to prove their affordability, those who can afford to will still spend big. And if any affiliate model previously relied on player traffic including problem gamblers wagering more than they could afford, congratulations, you made hay while the sun shone – but that's on your conscience and those times were never going to last.

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NEURO WORLD ORDER

2020 was a seminal year for iGaming. Out of the pandemic chaos, it adapted and evolved on a massive scale. But according to **Mark McGuinness**, renowned digital marketing director and iGaming futurologist, the next two years will be turbulent for global economies, job markets and gambling regulators. Here he examines what the future might hold for digital entertainment-based gaming and gambling



THE GOLDILOCKS EFFECT

Let us address the elephant in the room. iGaming in certain markets could be facing some form of mass extinction or prohibition akin to a modern-day social temperance movement, like those of the 19th and early 20th centuries. Or best-case scenario an inhospitable environment hindering survival. The Goldilocks effect comes from the classic Brothers Grimm story of the Three Bears. It's also used by NASA scientists when they're looking for a habitable zone around a star where it's not too hot nor too cold for liquid water to exist and allow life to flourish. In marketing, as many affiliate marketers know, the Goldilocks effect has been taught in marketing curricula for years as a way to look at applying psychological techniques to understand the customer journey that leads to a purchase decision or transaction. It has powered pretty much all growth marketing exhibited over the last few years in the form of promoting operators with the biggest sign-up bonuses to entice choice.

ADVERSCEINCE AND THE DIGITAL ENVIRONMENT

Digital marketing is changing and has been for some time. Why? Technology is driving wholesale changes in our innate learned behaviour and in our consumption and interaction with our daily digital environment, with brands, products and services via that most ubiquitous of inventions, the smartphone. I'm sure you've heard or seen many presentations that we are in the attention or experience economy. The smartphone has unleashed and empowered many of us but it has created an attention deficit syndrome, and with untold access to limitless information, it has caused an equal and opposite effect of digital decision or cognitive overload. Our brains now have attention or interest spans of seconds, which perhaps with a move out of necessity to working from home, coupled with Zoom fatigue, certainly means we are time poor, more irritable and confused

by the relentless onslaught of messages, which may result in the wrong purchase decision being made or bet placed.

There are no official figures, but it's estimated the average person may be exposed to anywhere between 6,000 to 10,000 advertisement interactions every day, estimations that are double to what they were in 2007. But unlike IT where you can scale your business by adding another rack of servers, we can't add another rack of servers or another organic brain to assist, or at least not currently that is.

With all these environmental factors, iGaming marketers, whether affiliate, product, acquisition or retention-focused, need to embrace the discipline of neuromarketing and apply brain science to marketing, advertising and product research.

NEURO DESIGN

We have all experienced the growth and business needs in areas of UI and UX. It's fair to say design is not just a tactic or just doing A-to-B testing on your landing or conversion pages. It's a strategic requirement and a strategy. While human creativity is a beautiful and wonderful thing, we shall see more of neuroscience pervading all facets of an iGaming operational business with the rise of neuro designers, neuro proposition managers and other hyperbolic terms, with skillsets that draw on psychology, aesthetics, AI, social psychology and advanced testing models that all combine to understand how the brain decodes information.

NEUROMARKETING VERSUS MARKETING

Many of my fellow marketers are quick to debunk neuromarketing perhaps on the grounds of an ethical standpoint. The reality is marketing is geared to influencing people to buy. The internet is a huge experiment and many large behemoths have been collating big data on neuromarketing principles for some time. Our digital footprints of how the brain processes visual information and interacts with visual stimuli, as witnessed on many social platforms, include how social psychology impacts the conscious and unconscious processes as they relate to consumer choice and behaviour influences, attitudes and opinions.

Neuromarketing should be viewed to inform and educate what's going on in the target consumer's brain, and how the brain reacts and unpacks information to marketing stimuli in different contexts and different channels to ultimately show how the brain translates this information into consumer action decisions, such as registering an account and transacting.

RESPONSIBLE GAMBLING

We are already witnessing changes in how operators view their responsible gambling requirements with recent appointments of renowned experts from the scientific community in areas of psychology and behavioural addictions to some well-known operator brands.

These businesses understand the need to not only look beyond data-science to merely drive financial KPIs, but also look into the science behind neuromarketing. Why? Because understanding the brain via neuroscience will unlock methodologies to attract the profile of a customer who, in the main, enjoys responsible gambling participation, but equally allows businesses to develop profiles and detection pattern systems to reduce placement, context or advertisements that may result in customers susceptible to gambling addiction behaviours.

With advancements in neuro marketing software, it's very likely in the not-too-distant future that this software will be a pre-requisite within the operators elected tech-stack or platform, or is provided by a 3rd party in the same vein as how a vendor is selected for provisioning CRM solutions or an affiliate marketing provider.

The future of digital gambling is not about more content in the shape of casino games, more sports betting markets, or giant steps forward in technology or seismic innovation shifts. It's about simplicity, reduction in betting choice and the neuroscience that ensures products are relevant to consumers in a responsible gambling manner.

“NEUROMARKETING SHOULD BE VIEWED TO INFORM AND EDUCATE WHAT'S GOING ON IN THE TARGET CONSUMER'S BRAIN, AND HOW THE BRAIN REACTS AND UNPACKS INFORMATION TO MARKETING STIMULI IN DIFFERENT CONTEXTS AND DIFFERENT CHANNELS”



MARK MC GUINNESS



THE SWEDE SMELL OF SUCCESS

Erik Bergman, Great.com founder, speaks exclusively to *Trafficology* about his beginnings with Catena Media, the bright future for the Swedish affiliate market, and the struggles involved with building a social media presence

Can you tell us about your journey with Catena?

The journey with Catena happened more or less by accident. It was me and my childhood friend, Emil Thidell, and we failed at everything else we tried. Then we started building bingo affiliate sites, which also completely failed. In the first years we actually gave up on that and started doing a bunch of other things, then came back to bingo affiliation after looking into the accounts and seeing \$1,000 in there. That was around 2008 I think, and we kept building from there. It was always just a fun play around. We were building websites about bingo, but also mortgages, business cards fashion, everything we could come up with for about four years until 2012, when we partnered up with Optimizer Invest and decided to go full in on casino.

And that's kind of the inception of what became Catena Media, even though it started long before then. It was a chaotic journey, which almost ended in 2013 because we ran out of money, but we managed to turn it around luckily, and the rest is history. It mostly feels surreal. It's all just a blur in a sense but I had a lot of fun. We were a lot of wonderful people and we had perfect timing.

How would you characterise the affiliate market in Sweden today, and how much has it changed over the years, having been influenced by companies like Catena Media?

I think the Swedish affiliate market at the moment is in the worst shape it's been for a long time. It's really tricky now with regulations that haven't really been beneficial for anyone so far. It's getting even trickier due to Covid and extra regulations on top of everything. So I believe that right now, Sweden is in a really bad place from an affiliate perspective, compared to how it used to be. It used to be TV marketing running 24/7 for everyone and no regulations, no anything. And back in the days when we started, even the competition was low.

But I believe that Sweden is a future market. That's why we focus on it with Great.com. Sweden also has great internet, high pay in general, its people love to gamble, it has a long history of gamblers here, so I believe that the regulations will shift towards something that is sustainable for everyone involved. Right now the problem is that there's absolutely no benefit to being a regulated operator, and they don't do anything to close out the other ones that have bonuses and do all the things that regulated operators can't do.

But my belief is this will sort itself out over a few years. I believe that politics is slow, and regulators haven't really done this before. So my belief is that Sweden's market, if you look at it from a 10-year perspective, is going to be a wonderful market. But if you look at it from a two-year perspective, it's in pretty bad shape.

Is it frustrating then looking at certain other markets where affiliates have developed and evolved over the years, with Sweden lagging behind due to the regulatory issues you mentioned?

Sure, but Sweden had a wonderful run, so you can't complain if you've been in the Swedish casino industry over the last decade. We can deal with a little rough patch now, it makes sense. It's been a magnificent run for anyone; more or less everyone made money if you were in the Swedish gambling industry for the past ten years. So I think that this just gives the industry an opportunity to clean itself up, get stronger, to not just be the one man show in a basement, but actually in need to figure things out.

So I believe this is a good thing over time, and I believe that whoever wants to go for the quick buck, whoever wants to go for India, Canada or Finland or whatever, feel free. Those markets are like Sweden were a few years ago. If you want the quick buck, there are opportunities everywhere, but if you want to build a big, long-term sustainable business, then I



believe Sweden is going to be a great market over time, and that this is just a phase.

You made headlines a couple years ago when you founded Great.com, which is very different from Catena. You're an online casino affiliate that donates 100% of profits to climate change initiatives, but what inspired you to pursue this?

First, I wanted to build one big casino affiliate website because what we struggled with for Catena, and what I believe most affiliates struggle with, is they build a lot of websites, which means it's really hard to build one big website.

We have AskGamblers and a few others, but even with AskGamblers, which is run by Catena, which runs 50 other websites or whatever it is by now, it came back to me wanting to build one really big website. And when it came back to me, I wasn't really inspired by making money anymore. I had more money than I needed. I don't really care about materialistic things; I don't care about the car I'm driving and I don't want a big boat. So for me, giving the money away gave me a big inspiration to actually make a change by doing this.

So if I can build a big casino website, which is one passion of mine, and I can help a lot of people, which is another passion of mine, that just makes sense. It comes from both wanting to add value to people in the world, as well as enjoying building casino affiliate websites. I love the SEO, chasing links and all the things around it, and figuring these things out. So for me it was a perfect match between two different worlds.

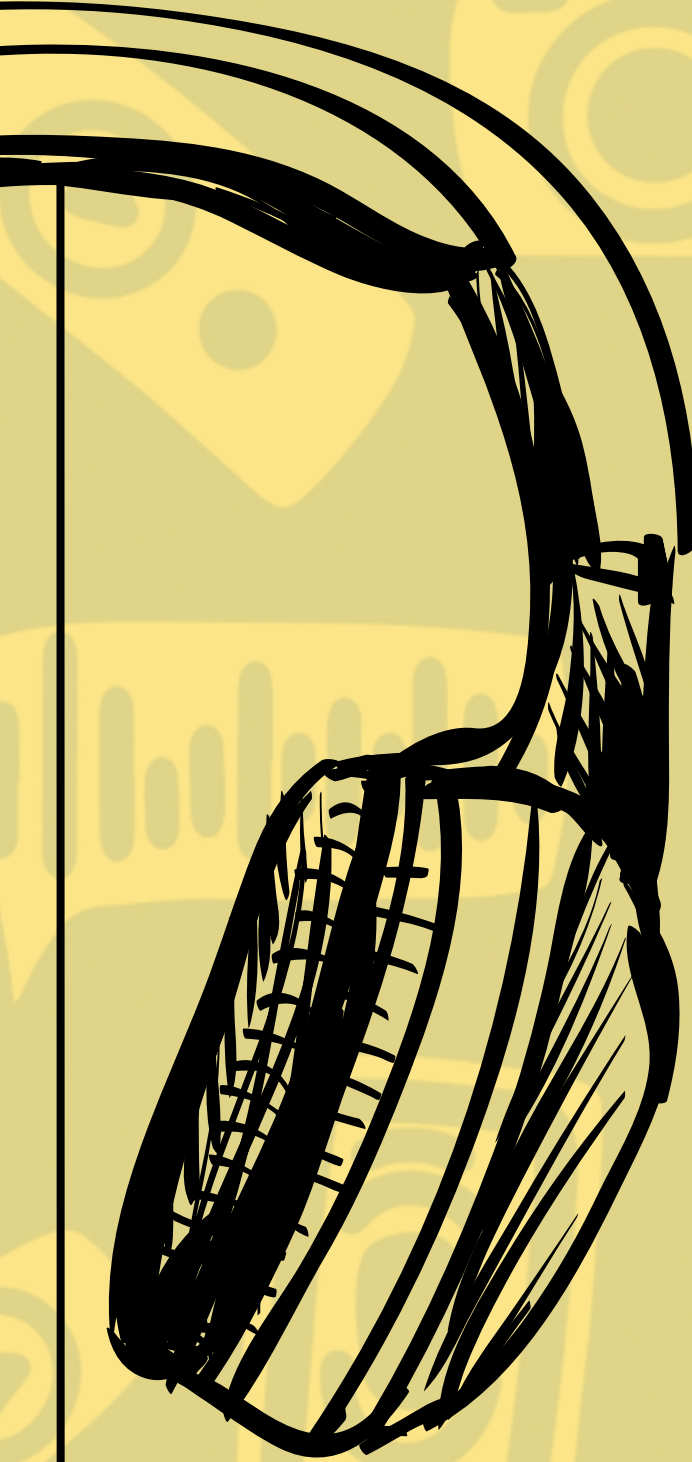
Can you explain your social media strategy, but also your thoughts on how it's used more generally in the industry and in Sweden as well?

That becomes two very different questions. If we take the extreme and we look at Tesla, I believe it could be an amazing SEO company. They could get links to anything. And a big reason for that is Elon Musk, who is a superstar and the face of Tesla. If I asked you about who's the face of Mercedes you have no idea, the face of Ferrari you have no idea, the face of any big car company you have



ERIK BERGMAN





**“MY BELIEF IS THAT SWEDEN'S
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FROM A 10-YEAR PERSPECTIVE,
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FROM A TWO-YEAR PERSPECTIVE,
IT'S IN PRETTY BAD SHAPE”
- ERIK BERGMAN**

no idea. But with a superstar like Elon Musk, you can drive publicity in a way that few other car companies or any other company could do. And to create a character like that you could either accomplish ridiculously magnificent things, which he has done, or you can be really good in social media, because there are a lot of superstars that have got big that way as well.

My belief is that if I can add a lot of value to a lot of people through social media - I have 600,000 followers right now who daily consume things that I produce - and if they feel that I add value to their lives, they will one way or another want to add value back. I haven't figured this out yet, but I'm guessing thousands of them have blogs or they have websites in one way or another, or they work in PR or media. And once I can figure out how these people could be excited about benefiting Great, I believe there's an army of excited people out there that would want to do the same thing, where they want interviews, publicity and these kinds of things. I haven't cracked the code of how to translate followers into publicity and links yet, but I'm feeling confident that the more followers there are, the more times they have consumed the content, so the more value they feel I've added to their lives. Because I really pour my heart into adding value to their lives, I'll one way or another figure it out.

Looking at the other side then, what you can do with social media for general casino business or affiliate business, I would say that it's ridiculously hard. I found it hard to do focusing on inspiring content and entertainment, to try and do social media with casino content and getting value from it that way. Personally, I would say it's a waste of time and energy. It's much harder than I anticipated it to be.

We're not building any social presence for Great.com as a brand because it's been too hard. So I wouldn't even do social media if I were an online casino or an online sportsbook if I didn't have a very clear idea of why I'm doing it, and I didn't have people who loved doing it. Because if you don't love it, you're in trouble. I love doing the content that I'm doing for social media in an educational and inspirational way, but without that passion, it would be very hard to stay consistent.

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IS THAT A CHALLENGE?

The 1account team speaks on the *GI Huddle* in December about the player verification hurdles facing both operators and affiliates



We understand you've issued a challenge to operators. Can you tell us a bit about this challenge?

The idea behind this was to prove that by using our 1account verification proposition, we can improve the player taken-on and increase revenues for gaming operators by somewhere between 5 and 10% at no extra cost. It sounds like a pretty good challenge, so why not?

Something that's inspired this is what you've spoken about at 1account before: operators not fully optimising verification processes and consequently losing revenue because of it. Can you explain this in more detail?

Gaming operators have been using identity verification

systems for years now; it's nothing new. But the existing solutions in the gaming sector have a success rate, that is the number of people you can successfully identify out of 100 people and bring them on board as players has more or less leveled out at around about 85-90%. It's become accepted as the norm. But if you think about the maths, that means you're leaving on the table somewhere between 10-15% of new players coming to your site. That means no revenue, no deposits from that percentage. Obviously, it will never be 100% as there are bad actors out there in the world today. But the number of bad actors is actually relatively small. So if you can work on getting an additional 5 to 10% more players on board – and you can prove it – it's a bit of a no-brainer proposition.

How has increased regulation affected operators in recent times, in the field of identity verification?

I think the regulatory environment is an interesting one. Most of this has been driven by the UK and the Gambling Commission, which is leading the charge when it comes to ever-increasing regulatory requirements in the gaming sector. Verification has got a very different feeling now, because years ago checking someone was over the age of 18 was kind of all right. But then that moved into real, more robust identity verification requirements. Now, with increased emphasis on being able to emphasise problem gambling, compliance with anti-money laundering, the whole term of verification has become way broader. Looking down the road, I think operators just expect that to continue. The same requirements will start rolling out, I'm sure, into other jurisdictions within regulated markets. You can see that train coming down the tunnel at you and it's not going to stop.

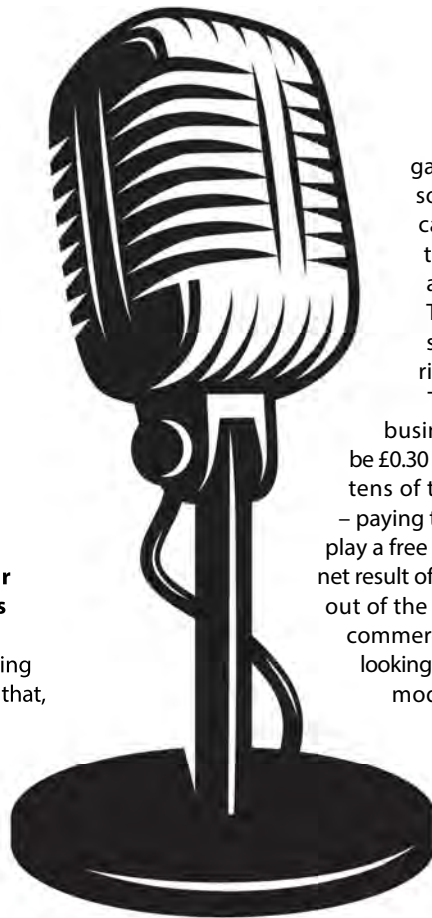
Do you think the way regulations have been imposed on operators is fair?

The overall intent is fair. I think what's maybe been slightly unfair is that some of the requirements are actually quite difficult to do, for example in the area of problem gambling. The ability for a gambling operator to be able to assess whether a player is in a financial position to spend £50 (\$68.49) a week on gambling or not is a very difficult thing to do. It's kind of got a bit easier recently, as there are now some data sources that can help you assess someone's affordability when you first set up an account. So I think the intent is fair but what's not fair on the operators is some of the requirements have been very difficult to do. It is getting easier, with some of the propositions we have for example, but sometimes technically you can understand what the regulators want you to do – but how do you do it? It starts getting more complex outside the UK in other parts of the world too. The UK is more sophisticated in terms of data sources but, in other jurisdictions, they may not exist. But I don't think anyone would disagree with the overall intent.

1account works with affiliates as well. Is your work the same here as with operators or does it differ?

No, it is exactly the same. The reason we're working with the affiliates within the gaming sector is that, last year, the Gambling Commission brought in some new regulations. They brought them in to apply to operators not affiliates, but they put the onus on the operators to ensure everybody in their food chain was doing the right thing. Affiliates that provide traffic to operators are most definitely in their food chain. The specific requirement was that for free-to-play casino

“THAT COULD END UP WRECKING YOUR AFFILIATE BUSINESS MODEL FOR THE UK MARKET. IT WOULD BE £0.30 PER CHECK OR £0.75 PER CHECK. AN AFFILIATE HAS TENS OF THOUSANDS OF PEOPLE GOING TO THEIR SITES – PAYING THAT OUT EVERY TIME ONE OF THEM WANTS TO PLAY A FREE SLOT GAME JUST DOESN'T MAKE SENSE”



games, you have to be able to validate that someone's over the age of 18 before they can play a free slot game. What that did to affiliates serving the UK market all of a sudden changed their business model. They pretty much had to go out and pay somebody to check someone was the right age before they played a free game.

That could end up wrecking your affiliate business model for the UK market. It would be £0.30 per check or £0.75 per check. An affiliate has tens of thousands of people going to their sites – paying that out every time one of them wants to play a free slot game just doesn't make sense. So the net result of that was a lot of the major affiliates pulled out of the UK market, because it just didn't make commercial sense. When we launched 1account looking at this marketplace, we created a business model that enabled us to provide that age verification solution to affiliates at no cost to them. It enables affiliates to be compliant, thereby ensuring operators are compliant with the new regulations without disrupting their business model. So we've really opened back up the UK market for affiliates, which was previously in effect shut down for them.

SETTING THE PACE

PlayAttack's **Helmet Guy** outlines the reality of the year ahead for affiliates, and the best ways to stand out from the crowd



What is PlayAttack looking forward to most this year?

2020 was quite a year for everyone. Some businesses suffered losses, and while others weren't affected financially, they still had to adjust their processes to the new reality. For us, 2020 was quite eventful. We assembled a Malta team, some of our brands launched under MGA and SGA, and we made over 200 technical improvements on our affiliate platform.

Last year, we didn't get the chance to connect with our partners on a more personal level due to events being cancelled. However, the whole situation helped us focus on what the digital space has to offer, and we can't wait to apply the lessons learned.

This year will be more about personalisation and customer satisfaction — it's all about improving our affiliate marketing software and exploring our creative potential. Having our own platform means that we get to make improvements based on

our partners' feedback, so we're definitely looking forward to making the most of it.

We'll also work to advance awareness for the brands that operate under the PlayAttack umbrella and focus on producing more educational content. We're planning to explore our creative potential and develop more methods that will help us communicate with our audience and those making their first steps in affiliate marketing.

Last year, you told us a big focus for Q3 would be video and content campaigns. How do you reflect on how those campaigns went?

2020 was a year where PlayAttack focused on brand awareness so we produced a lot of video content, wrote for the most prominent news outlets in the gambling industry, and did many advertising campaigns.

Video was, is and will be one of the leading marketing tools. We didn't want to be just a boring affiliate program, so we chose a more creative format to communicate with our affiliates we were thrilled with the response from industry professionals. We received tons of messages from the iGaming community congratulating us on our marketing efforts, while some of them sought advice that would help them improve their strategies. I think we owe that recognition to the infotainment format that we follow with our videos and the numerous thought leadership articles we published throughout the year.

This response was essentially what we were aiming for, as fewer and fewer industry professionals don't know who the Helmet Guy is or what PlayAttack is about. So yes, I'm happy to say that our goal was 100% achieved.

You also mentioned you were closely monitoring the situation in Sweden. What direction do you think the Swedish market will take this year?

I think we mentioned this in one of the first videos we had about Sweden's gambling restrictions. The country introduced temporary restrictions to combat a potential rise in problem gambling amid the pandemic. However, in line with both our predictions and industry professionals' estimations, we're now seeing that there are calls to make these restrictions permanent.

Such actions could potentially result in operators becoming increasingly uninterested in acquiring a Swedish gambling license and a subsequent rise in problem gambling. Some unlicensed operators are even advertising that they're not bound by any license and are, therefore, not subject to any restrictions.

While the Swedish government's intent is noble, all these restrictions may create an environment where unlicensed casinos have the ground to prosper. That said, the result of these actions could be opposite to what the government envisions: reduced consumer protection and difficulty in monitoring the public spending on online gambling.

The Swedish government made promises to implement a strict monitoring system to ensure that players are protected, but I think this is a very optimistic view of the situation.

How is the pandemic affecting life in Malta right now for you and other brands or gaming partners you work with?

Land-based casinos suffered losses, and the pandemic hurt the revenues of operators with a focus on sports betting.

The online casino sphere was not as vulnerable; casino operators were affected the least and even saw an increase in some cases. Therefore, both our businesses and our partners didn't suffer huge losses.

But the consequences of the pandemic are not just financial. We missed out on the opportunity to meet our partners in person and to further strengthen our ties or create new ones. Then again, the pandemic gave us the chance to explore our potential in the digital sphere. So yes, it might have been a challenging year, but it taught us a lot, and I can say that the industry response to the new status quo was pretty much immediate.

What are some of the biggest challenges you'll face this year?

The only thing we can be sure about is that the future

is uncertain. And this, I think, is the biggest challenge.

2021 will put the industry to the test. Innovation and creative thinking will be valued more than ever. The new regulations, limitations and advertising restrictions are making it increasingly difficult to promote your brand or services, so I think the biggest challenge will be to stand out from the crowd when in reality, your hands are kind of tied. We will have to adapt and focus on making our product interesting, useful and entertaining to capture the audience's attention.

Moreover, as more countries come up with their own regulatory frameworks, the fragmentation of the markets might be an issue for the smaller affiliates and push them out of the market. Therefore, as an affiliate program, we'll need to help these affiliates meet the requirements. Our activities are so intertwined that the non-compliance of partners could backfire on our brands, and this is something that we will work on avoiding.

Do you have any industry predictions for the affiliate sector?

We do expect some changes in terms of promotional tactics and the ways affiliates promote gambling operators. With all the restrictions that are being rolled out, the industry will likely start shifting towards replacing their hard sales pitch with non-intrusive, useful content. Affiliates might also begin to put more effort into establishing a social media presence to nurture a sense of belonging.

Moreover, with the continuous advancements in the responsible gambling regulations, affiliates will have to adapt to the new processes and work alongside operators to promote player safety. They might have to start educating players on responsible gambling and help them recognise signs of problem gambling.

“AS MORE COUNTRIES COME UP WITH THEIR OWN REGULATORY FRAMEWORKS, THE FRAGMENTATION OF THE MARKETS MIGHT BE AN ISSUE FOR THE SMALLER AFFILIATES AND PUSH THEM OUT OF THE MARKET. THEREFORE, AS AN AFFILIATE PROGRAM, WE'LL NEED TO HELP THESE AFFILIATES MEET THE REQUIREMENTS”

Cian Nugent speaks about his new role as chairman of Responsible Affiliates in Gambling, and what the 2005 Gambling Act review means for affiliates and the industry at large

"Clive has been the chairman of RAiG since we launched the association in 2019 and has played a big role in getting us to where we are now," says Nugent. "I'm very excited

"I think it starts at the top of any company and there needs to be clarity that promoting gambling in a responsible way is not an obstacle to commercial objectives, but actually the best way to build a successful business and contribute to a sustainable industry," he continues. "From there, it's about education and training and ask if the members of our teams

understand what promoting gambling in a responsible manner looks like and if they're armed with the tools to allow them to do their job in that way."

While responsible gambling has always been central for RAiG, it's now in the spotlight more than ever amid the government review of the 2005 Gambling Act. The review has stolen industry headlines in recent months, and it will continue to do so.

"I think a review was inevitable," explains Nugent. "The original recommendation was that it would be reviewed regularly to keep pace with change and that obviously hasn't happened. As acknowledged in the introduction to the review, gambling participation rates and problem gambling rates have remained broadly stable for the last number of years, so I'm not sure it's necessarily correct to say that the UK has a major gambling problem right now, as opposed to any time previously. However, it's also correct to say that the availability and promotion of gambling products has increased significantly over the years and we're still talking about a very large number of people at risk and as an industry we can and must do better to ensure the best possible protections are in place for those people."

On the timing of the review and the initial stages of the pandemic, Nugent added: "The UKGC recently concluded that 'there has not been a significant or sustained increase in gambling activity' since the pandemic began, so I don't think COVID-19 has necessarily accelerated the need for the review. The justifications for a review existed before the pandemic and I don't think the timeline for it has changed significantly."

The wide-ranging review has been backed by more than 50 MPs and peers, who last year backed stricter controls on gambling advertising. Such advertising is a key issue currently under review, with sports betting sponsorships, limits on online stakes and tough affordability checks also under consideration.

Perhaps no-one in the industry knows exactly what will happen at the end of the review, including Nugent: "It's very difficult to say where this will end up and obviously the Gambling Commission is consulting on affordability measures separately. However, I think the framing of the terms of reference and call for evidence [in the review] is encouraging and the opportunity is there for affiliates to explain the important role that we play in the gambling ecosystem and the key part we can play at the forefront of promoting safer gambling and the channeling of players to regulated operators."

"Collectively RAiG members interface with millions of customers each month and our relationship with those customers is very different to that of an operator; we have a unique voice and can play a vital part in the government's stated aim that 'all those who choose to gamble in Great Britain to be able to do so in a safe way.'"

RAiG fully supports the review, and many others within the industry echo this sentiment. There are, however, several operators, suppliers and bodies who, while welcoming the review, have stressed the importance for it to be balanced. One aspect of any potential balance will undoubtedly involve the presence of black market operators. The issue has stirred up quite a debate in recent weeks, with bodies like the Betting and Gaming Council (BGC) arguing that customers could quickly turn to operators who have no regard for customer safety. But the government has since shot down this argument, suggesting that the threat of black market operators has been exaggerated.

Nugent offered his thoughts on the situation: "I think both sides of the debate have probably been blown a little out of proportion and in doing so the main point is overlooked.

Changes to regulations in the UK will inevitably change how consumers engage with the gambling product that is available to them and the important thing is that the full range of consequences (both positive and negative) are evidence based and carefully considered before implementing changes."

Given the broad scope of the review, it is understandable that there may not be any specific advice that those within the industry can adhere to. There are, however, actions that affiliates can take in order to remain on the right side of the law before any final judgement call has been made.

"Over the coming months I think it's very important that affiliates do their best to fully engage with the Gambling Act review," suggests Nugent. "Through RAiG we'll be presenting our view on behalf of all our members and I would urge anybody that is interested in joining us to get in contact. But even on an individual basis, affiliates should be engaged with the process. It's a good opportunity to have their say and I think it would be remiss for anyone to think they should just wait it out and hope that it goes in their favour."

While the review and the pandemic look set to dominate the industry for the foreseeable future, RAiG remains committed to promoting responsible gambling, and Nugent's role as chairman will hope to ensure that happens. While the body has already taken the necessary precautions and measures to engender such a scenario, Nugent is the first to admit that there is plenty more that can be done to promote safer gambling.

"RAiG was initially set up with the purpose of raising standards across the affiliate sector, with a particular focus on safer gambling. While we've taken steps in the right direction, there is still and will always be more that we can do. Our aim is to make sure that we continue to take tangible steps forward in advancing that agenda."



CIAN NUGENT



JASPER JOHNS-FLAG

BETTER DAYS AHEAD

Marc Pedersen, VP of business development and M&A, and general manager US, Better Collective, speaks about gaining momentum in the US and how 2020 has served as a springboard to better things

What are Better Collective's priorities in the US market at the moment?

We remain highly dedicated to take part in the emerging US market, where more states are opening for online gambling. We are well-positioned in the market with strong acquired brands such as VegasInsider, RotoGrinders, SportsHandle and ScoresAndOdds while also having added deep local market knowledge to the Group. In the coming years we'll continue to invest in quality content for our users in the US as the market remains strategically important for Better Collective.

Much has been made of the difference in betting content between the US and Europe. How does Better Collective approach the contrast between American-focused B2C content and the UK market, for example? Regarding

betting previews or affiliate content like that, how would BC approach it differently in the US market as opposed to a European market like the UK?

One way to approach the difference is to have colleagues on ground in the US with local market and cultural knowledge. We believe this is crucial to be successful in the long-term and the reason why we've invested in building an organisation in the US. In regard to the content, there are cultural differences that need to be taken into consideration. For instance in Europe, we've historically operated within the affiliate marketing model, typically CPA or revenue share based, which ensures we can provide a quality experience free of charge for our users. But in the US, people are more willing to pay for picks and premium sports betting analysis. Also, daily fantasy sports have historically been based on the CPA and revenue share model

so there are opportunities for us to combine our expertise with our new learnings in the US.

How much of a focus is there on esports betting and content for Better Collective in the US?

Overall, esports is growing in the US as it is across markets in Europe. We've especially seen the strong importance of esports during the lockdown periods in 2020 in markets where they are legal and regulated. As with all sports betting options available in regulated states, we're looking to support bettors with our broad range of betting resources, and that will include esports to the extent we are legally permitted.

A great example from Better Collective is our acquisition of the CS:GO media platform, HLTV, which we believe long-term will allow us to grow alongside the esports markets around the world.

How much of a gamechanger would mobile sports betting be in New York, given the Governor's recent comments in favour of online wagering?

Regulating mobile sports betting in New York, being one of the biggest states in the US, will definitely present new opportunities in the market overall.

The regulation of online wagering in the state, similar to the NJ model, which allows multiple operators to take part and compete in the market, will be a win-win situation for the customers and the state as the channeling of players to the regulated system will ensure good products and lines, and a higher degree of safety for the players. The state also has the opportunity to add new tax revenue streams adding to the state budget in a challenging time following the pandemic.

Are there any other key states you see making a difference to the overall market?

There are a number of major markets opening up this year;



MARC PEDERSEN

"OVERALL, ESPORTS IS GROWING IN THE US AS IT IS ACROSS MARKETS IN EUROPE. WE'VE ESPECIALLY SEEN THE STRONG IMPORTANCE OF ESPORTS DURING THE LOCKDOWN PERIODS IN 2020 IN MARKETS WHERE THEY ARE LEGAL AND REGULATED. AS WITH ALL SPORTS BETTING OPTIONS AVAILABLE IN REGULATED STATES, WE'RE LOOKING TO SUPPORT BETTORS WITH OUR BROAD RANGE OF BETTING RESOURCES"

Michigan, for example, with a few of our partners starting out of the gates. Catering to sports fans in Detroit continues the opening up of legal, online betting in the Midwest, along with the full online registration of Iowa, which started this year. Illinois, with the Chicago metro area, is a key state, especially with Governor Pritzker continuing to extend on a monthly basis the waiver on in-person registration. This means that bettors in Illinois can sign up for a legal, online sportsbook from anywhere in the state.

Additionally, with Virginia legalisation, there's now legal online betting for 8.5 million new people, many of them living in or near the greater DC metro area. With DC still reliant on in-person betting (even with an app, you have to be on-location), and many DC workers living in Virginia (and thus, during the lockdown, not travelling into DC at present), legal online betting in Virginia creates a large, new market for affiliate companies and sportsbooks. Also, citizens in Maryland voted to authorise sports betting and we're looking forward to that process developing over the next few months.

Ultimately, we'll also start to see a number of southern states legalise this year, such as Georgia and possibly even Kentucky, which is a good sign for the industry as a whole.

How does Better Collective reflect on such a tumultuous 2020 for US sports betting?

It's been a challenging year for the industry with postponements and cancellations of sports events leading to a natural decline in sports betting activity. However, following the big lockdown in spring and early summer, sports have again returned and betting activity has also returned with fans eager to focus on sports again.

2020 was a year where we had to adapt to a new situation and find new ways of managing the business on a day-to-day basis. We've learned many things and were afforded the opportunity to accelerate the digitalisation of our cross-team collaborations. No doubt, we're looking forward to a more eventful and positive 2021, where a lot of Americans again can engage in the entertainment of sports betting. I very much look forward to spectators getting back into the stadiums in a safe manner. Live sports with a crowd simply provide a better sports experience.



PLAY HARD

René Petersson, commercial and acquisition team lead, Better Collective

WHAT IS YOUR FAVOURITE INDIVIDUAL MEMORY FROM WORKING IN THE GAMBLING/AFFILIATE INDUSTRY?

A few years ago, a company I worked at had a skybox at Santiago Bernabéu. We used to invite business partners to the matches, and I was lucky enough to get hold of the tickets for the Real Madrid-Barcelona match. I invited a close business partner of mine and we had a good time. As a lifelong football fan it was a great experience seeing what's regarded as the biggest match in football live and in luxurious surroundings.

IF YOU HAD TO PICK A SPIRIT ANIMAL, WHICH ONE WOULD YOU PICK AND WHY?

I would pick an elephant. They travel in herds and from what I understand got a great memory, can communicate with each other and stick to their herd for life. There's something warm and human-like about that behaviour with an animal.

BEING BASED IN DENMARK, HOW OFTEN DO YOU HAVE A COFFEE AND A DANISH FOR BREAKFAST?

Not often enough. A Danish is great but I'm not much of a runner and I'd need to be that if I had them regularly. I prefer them as an afternoon snack on the weekends instead of for breakfast. A coffee or two in the morning is a daily routine though.

DANISH BUTTER COOKIES - DELICIOUS OR TOO DRY?

Far too dry. Would need a bucket of milk to dip them in, if I had one.

YOU'VE DONE SOME FOOTBALL COACHING IN YOUR CAREER. IF YOU MANAGED A TEAM THAT WAS 2-0 DOWN AT HALF-TIME IN A CUP FINAL, WOULD YOU GIVE THEM THE HAIRDRYER TREATMENT OR TRY TO ENCOURAGE THEM?

A mixture probably. I'd let them know it's now or never, and based on their first half performance, stress it's their last chance to ever win a final. I'd change to three at the back and add another upfront. Preferably someone big to create space for my two fast-paced forwards. It would be full-on gegenpress for the remaining 45 minutes.

IF YOU WERE ONLY ALLOWED TO WATCH ONE NETFLIX SHOW FOR THE REST OF 2021, WHAT WOULD IT BE?

Without a doubt The Walking Dead. I've seen every episode and can't wait for the next season. I love watching TV shows where I'm asking myself, "What would I do in their situation?" With The Walking Dead, I would've been dead two minutes into it though. Wouldn't mind starting over by watching it again throughout 2021. ◀





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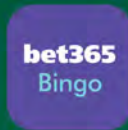
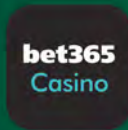
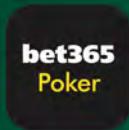
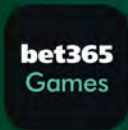
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