

# trafficology

AFFILIATE FOCUS BY GAMBLING INSIDER

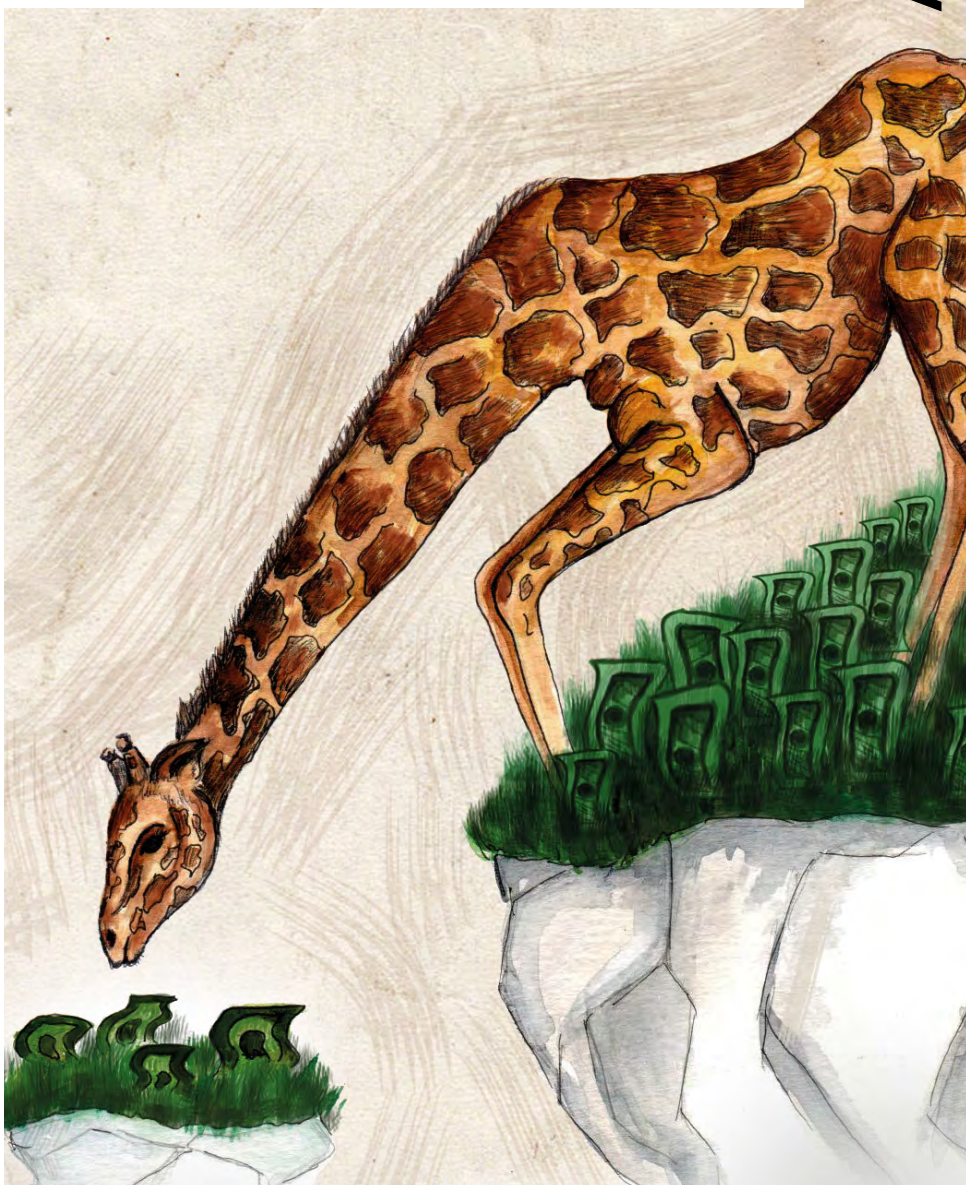
AUGUST 2017

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## CROSSING THE DIVIDE: FROM AFFILIATE TO OPERATOR

What are the challenges facing affiliates that want to change course and enter the world of online gambling?

# BETSSON AB CASINO REVENUE INCREASES 26% IN H1 2017

Online gaming giant Betsson AB has reported a year-on-year casino revenue increase of 26% in the first six months of 2017.

In a statement to investors, the company reported that casino revenue had increased from SEK13,523m in Jan-Jun 2016 to SEK16,695m in the same period of 2017.

Betsson's year-on-year revenue grew by 18%, rising from SEK19,355m in the first six months of 2016 to SEK22,794m for the first six months of 2017.

Furthermore, the company's gross profits jumped 15% from SEK 14,404m to SEK 16,574m.

However it hasn't all been wine and roses for the Nordic operator, with sportsbook revenue and turnover both dropping by 8% and 2% respectively. Additionally the company's cash flow dropped 17% following significant investment in its mobile casino operation.

Announcing the company's results online, Betsson CEO Ulrik Bengtsson commented: "The revenue growth in the second quarter was 26%, with an organic growth of 15%.

"Betsson continues to gain market share, both in the highly competitive Nordic region and in Western Europe.

"The continuous product development is clearly paying off as both casino and sportsbook have developed strongly. Operating Income (EBIT) grew by 31%.



"Operating income shows strong growth, despite increased betting duties, a continuing currency headwind and increased marketing expenses, again showing the scalability of the business model over time.

"It is also a good indication of the stability and balance of the business. Betsson is larger and a significantly more well-balanced business with higher growth rates, compared with a year ago."

## RAKETECH GROUP NAMES NEW CHAIRMAN

European iGaming and affiliate provider RakeTech Group have announced the appointment of Christian Lundberg as the new Chairman of the company's board.

Lundberg, who previously worked as a strategic adviser to several private and public limited companies through his A Force 4U business has previously served as a Nordic regional director for Microsoft and chief operating officer for central European energy provider Fortum.

In a statement announcing the appointment, Michael Holmberg,

RakeTech Group CEO said: "With Christian joining, we will further sharpen Raketech's leadership. Christian has vast experience from building winning cultures where everyone works towards the same goals and meets market demands with a focus on long-term values and profitability.

"He joins in an intense period where we among other activities recently have acquired several assets in Denmark. In addition, we have just reached our 100<sup>th</sup> employee, from being just some 30 people a year ago. I look forward

to working together with Christian and the rest of the board members to take RakeTech to the next level."

Lundberg added: "RakeTech is a company with high operational capacity and advanced technical solutions, active in the fast-growing European iGaming industry.

"I believe RakeTech has real possibilities to drive the continued development of the sector through responsible affiliate services with a focus on user value, and consequently secure a long-term and sustainable growth", he adds.



# BWIN UNVEILS REVAMPED ONLINE CASINO

European sports book and online casino operator bwin has unveiled a heavily-revised version of its casino site. The new site features an overhauled and advanced user interface with a plethora of enhancements to sharpen the aesthetics and create a more immersive player experience.

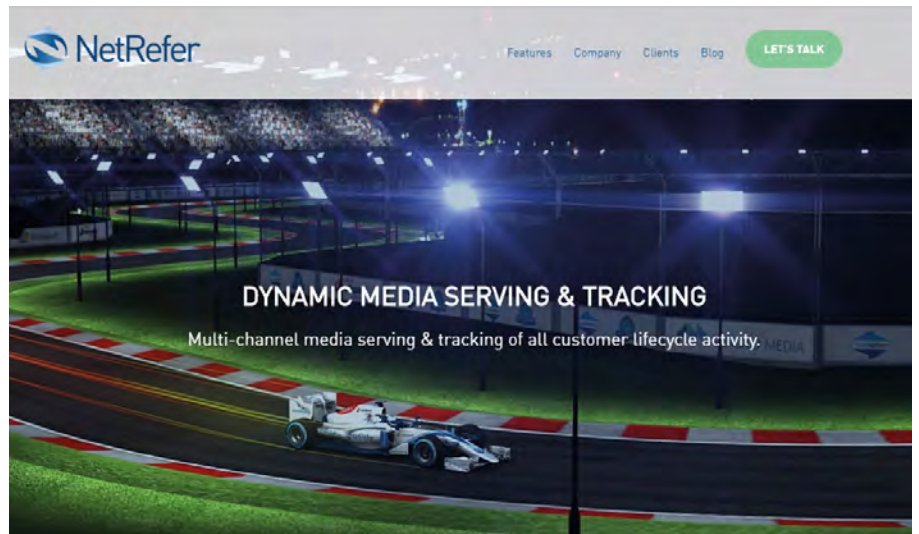
Among the features showcased as part of the launch are improved graphics, enhanced game icons, a new game launching system, enhanced promotional and SEO tools, a live casino and featured games category.

It's been a busy period for bwin who have added over 650 slot, skill and soft games to their site over the past twelve months, launching fifteen new games including its new Pro Series table gaming platform.

Commenting on the new site, Paris Anatolitis, bwin's Head of Casino & Gaming: "We've spent much of the past year improving the product offering at bwin casino, we are delighted to unveil a new website that reflects the quality of the product. We hope our players will love the new casino experience as much as we do."



# SUPERBET AND NETREFER LAUNCH JOINT AFFILIATE PLATFORM



Romanian betting and iGaming operator SuperBet has announced the creation of a new partnership with international affiliate platform operator NetRefer which will culminate in the launch of an affiliate platform focussing on the Eastern European affiliate market.

Under the terms of the agreement, Superbet will use NetRefer's unified performance marketing model to obtain information of player performance tracking and reporting, while NetRefer will allow the Romanian bookmaker access to its premium product suite, giving SuperBet's marketing team the opportunity to further develop customer relationships with affiliates throughout the region.

In a statement announcing the partnership, SuperBet Head of Romanian Operations, Ciprian Lazăr, said: "We are delighted to team up with a global leader in the field of affiliate marketing. We are looking forward to a competent and successful cooperation that will allow us to achieve our company's mission and vision."

Timothy Buttgieg, COO at NetRefer added: "NetRefer is looking forward to a successful partnership with SuperBet, the leading sportsbook operator based in Romania. We will provide SuperBet with our award-winning product suite and access to our industry experts to ensure growth on their already successful online operation."

# GIG STRENGTHENS HAND WITH STK MARKETING ACQUISITION

Gaming Innovation Group (GIG) has agreed to acquire all assets in one of Scandinavia's largest affiliate networks, STK Marketing, for a total consideration of NOK 240m (€26m).

Completed through its subsidiary Innovation Labs, the deal is GIG's largest affiliate acquisition to date, and marks the firm's fourth acquisition of 2017.

GIG detailed in a market update that it expects the acquired assets to generate more than €7m in EBITDA during the first 12 months after the completion of the transaction, with around 70% of this EBITDA expected to come through perpetual revenue share agreements.

Robin Reed, GIG Chief Executive said: "We have set an ambition for Innovation Labs to become the largest lead generation business in iGaming and we are well underway in realising this. Furthermore, we have now established a leading position in the Nordic affiliate market."

"In line with previous acquisitions and GIG's vision, the STK acquisition will enable Innovation Labs to refer more customers to our B2B partners and thus benefit all parties engaged in the expanding GIG iGaming eco-system."

GIG's other affiliate acquisitions this year include the purchase of Casino Tops Online, announced in March for a total of €11.5m.

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# THE DIGITS

Trafficology has partnered with data experts Casino City Press to bring you an invaluable insight into website and traffic trends across the gaming industry. This month we rank the number of iGaming site owners and operators, in addition to the number of affiliate programs.

## IGAMING SITE OWNERS AND OPERATORS

	<b>Name</b>	<b>No. of Sites</b>
1	bet365 Group	12
2	IQ Option	2
3	Paddy Power Betfair	19
4	Camelot	1
5	eToro Group	1
6	Betclic Everest	14
7	William Hill	16
8	Cherry	16
9	Stars Group	23
10	Hong Kong Jockey Club	2
11	SELAE	1
12	Gambling Malta	4
13	GVC Holdings	40
14	Ladbrokes Coral Group	22
15	SportPesa	1
16	Tipico	3
17	Bonne Terre	5
18	FXOpen Markets	1
19	KC Gaming Networks	1
20	Groupe FDJ	2

## AFFILIATE PROGRAMS

	<b>Name</b>	<b>iGaming Sites</b>
1	bet365 Affiliates	11
2	IQ Option Affiliate	2
3	eToro Partners	1
4	Betfair Partnerships	7
5	PokerStars Partners	21
6	William Hill Affiliates	13
7	Almor Affiliates	2
8	Ace World Gaming	6
9	Tipico Affiliate Program	3
10	Affiliate Hub	5
11	FXOpen Partnership Program	1
12	Bet9ja Affiliates	1
13	FDJ Affiliate Program	2
14	Kindred Affiliates	29
15	Stoiximan.gr Affiliates	1
16	Paddy Partners	5
17	bet-at-home Affiliates	5
18	Sunny Player Casino Affiliate Program	1
19	bwin.party Partners	16
20	BinPartner	1

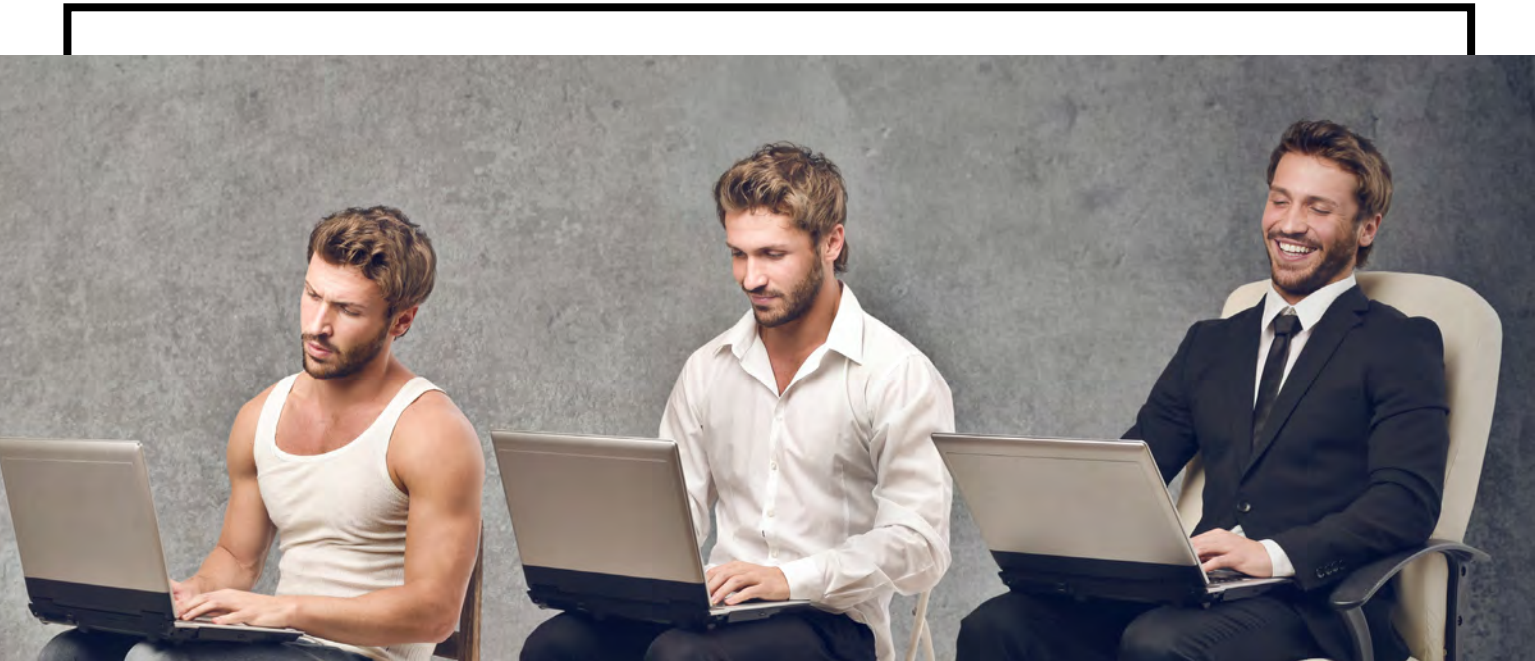
Rankings are estimated based on a panel and should not be considered absolute ranking values.  
Over 20 complementary top lists are available on the [iGamingBusinessDirectory.com](http://iGamingBusinessDirectory.com) website operated by Casino City Press.





# CROSSING THE DIVIDE: FROM AFFILIATE TO OPERATOR

For affiliates that find themselves reaping the benefits of a well-executed traffic generation strategy, it can often be tempting to look with envy at the operators they supply to. There is a perception that it is easy to turn a successful affiliate business into a prosperous online casino, mainly due to the wealth of white label platform options available. We spoke to **Allan Turner**, Chief Marketing Officer at iGaming operator BGO Group about the challenges facing affiliates that want to change course and enter the world of online gaming



**One of the main themes picked up at the recent Amsterdam Affiliate Conference was the trend of affiliates thinking it must be easier these days to turn into an operator. It's never been easier to implement a gaming platform and buy in some games, and you can't blame affiliates for thinking they could keep a bigger slice of the pie by sending their traffic to their own online casino. At the AAC we spoke to a number of operators who said affiliates going down this route didn't know what they were getting into. What's your view on this?**

I think other people you've spoken to are right. Some people are currently struggling to make their affiliate sites work because of changes in Google. Your SEO skills have to be amazing to

get a high level of traffic through Google these days. The other situation is that you have the large super-affiliates buying up all the small sites, and it's becoming harder to make money as an affiliate as a result. I think these market forces may have pushed people to look at new ways to make money, and implementing a white label platform is one way to do that. Because of the availability of solutions you can understand why lots of affiliates have considered becoming operators, however, I have to say that there are a number of considerations to be made, as in reality it can be very tricky.

A white label casino is actually quite hard to run, and the hardest bit will be the operational side of things. How do you manage CRM for example? Affiliates are excellent at

understanding conversions but they would need to consider how to structure bonuses and costs. How do you make sure people hang around the website? As a casino you need high retention rates to make money and that's the piece of the puzzle that might be a challenge for some.

**You would expect them to be good at the acquisition part of the process, but retention doesn't come naturally to affiliates?**

When it comes to social media, running ads and understanding acquisition campaigns, this is their bread and butter and they excel at it. But as I've said, how do you successfully manage the operations side of things instead of just the marketing? I see this as a potential sticking point for those in smaller businesses who might not have the expertise on site. The other thing that is important to give thought to is the margin. There are a huge amount of overheads that affiliates should be aware of, for example paying the player, payment processing, royalties, and bonus costs.

What I would suggest is focus on ways of improving your margin. You have to balance the equation of the cost to get a new customer, the profit they make, and then you have to think about sorting the bonuses and retention rates.

**There are clearly a lot of operational costs to setting up an operator site?**

You have 15% Point Of Consumption tax across the UK now, and royalties and software suppliers can cost you a pretty big percentage as well. Then your payment processing, CRM comms (sms or email) and affiliate platforms all take percentages. All these things add up and eat into your profit. This route can be better suited to larger affiliate sites with bigger financial clout, and they also have the right level of traffic resources that they don't need to work with other affiliate partners, which also cuts out that cost.

**Is there a conflict of interest for companies which operate affiliate sites as well as operator brands?**

**“AS A CASINO YOU NEED HIGH RETENTION RATES TO MAKE MONEY AND THAT'S THE PIECE OF THE PUZZLE THAT MIGHT BE A CHALLENGE FOR SOME”**

Some companies have their own operator sites as well as being affiliates; they generate a lot of traffic and send it all to themselves, and that works fine. The problem is when it comes to working with other affiliates, because if you're asking for traffic from another large affiliate group for your own operator sites it's like asking for their data. I think there's definitely a conflict there and it probably depends how the traffic sources, be it other affiliates, view it.



**Building up traffic and players is surely the most time consuming part of launching a new gambling business. For successful affiliates that are already at that stage, how long does it take to implement the platform and go live with a new brand?**

You have a lot of preparation to do before you can set up as an operator. You've got to choose and configure your white label solution, set up the tracking side, and then there's all the analytics. I guess it depends how complex you want the set up, but you could end up configuring quite a few tech systems. The obvious bit is how are you tracking traffic to the website? What affiliates system will you be using? Does the white label solution come with an affiliate system already attached to it?

Ideally you would go and get a solution from someone like Income Access or Netrefer who has a network in addition to white label software. Another question is, do you set up as a white label user of Income Access and do all the marketing yourself or use their managed services. Even though with white label products it's relatively easy to create a lot of marketing collateral and drop it onto the solution to give you a branded website, it's all the other material you need like banners and extra marketing collateral that needs to be designed before you do that.

I think it's short-sighted to try and come into the market with a standard white label and a URL with whatever adjective you can put in front of 'casino.com' – you probably won't go that far. You need a product which is unique, and whether that's through a novel loyalty mechanic, or you offer a unique structure or membership you need something to make yourself stand out, otherwise you will be lost in the noise. If you really wanted to set up a white label and all the tracking solutions you could probably be ready in a month. It's all the other backend processes that turn it into a 3-6 month process.

**What advice would you have for an affiliate wishing to start out as an operator?**

I would say if you want to go down this route you just need to have a long think about coming up with a brand and a proposition that's unique. Then focus on working out an effective way of running the operation and ensuring that you have a good deal with your white label provider.

As a white label affiliate you need to work very hard on getting the outgoings on royalties down to give yourself the margin to operate the business. If you can do that, have good negotiating power and you have a lot of traffic yourself as an affiliate you can do well out of it but I'd advise the first step is to think about your product long and hard before you commit.



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# MASTER THE ART OF GOING VIRAL

**Nicholas Duddy**, Founder of the mobile strategy and search marketing consultancy Miratrix gives our Trafficology readers an insight into how a business can grow and develop at an exponential rate through harnessing your K-Factor



Imagine you could successfully predict how your business would grow and prosper through the power of virality. You could be prepared for the response and the opportunities; you could maximise the returns; you could control your business better and be more efficient, not least because the customers you bring in through viral campaigns are found for free.

Well, now you can predict such growth. Your business possesses a K-Factor, and achieving your K-Factor is the key to Free High Quality Customer Traffic and Users.

## **BIG IDEA, EVEN BIGGER BENEFIT**

It's a simple idea, with big implications. Know your K-Factor and you can master the impact of gaining more business through going viral. Your K-Factor helps you map out the impact of social media campaigns and prepare your business for the opportunities.

Here's how it works. First we model your K then we use it to help you to set KPI's and go prospecting for business with greater accuracy, less time wasted and improved efficiency.

Basically you encourage your users to promote your activity through word-of-mouth, based on enhanced knowledge of what's likely to go viral. Having your K-Factor effectively removes more of the unknowns.

## **K-FACTOR ADVANCES KNOW-HOW**

In a contemporary business world of intensifying competition, in the traditional digital marketing platforms it is now costly to get yourself seen and heard. In fact, it is practically unaffordable.

Let's take a cold-blooded look at the situation. The algorithmic-based marketing platforms i.e. Facebook, Google and Twitter appear to pit company against company in a bid to increase revenue at the expense of everyone else's profit. They are not doing it for the good of their conscience, and why should they? This is business!





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For instances of this, check your historical ad spend over the years on Facebook and Google, alongside how much time and money is going on your SEO activity. I'm certain that the cost is not declining and I'm equally positive that the impact is not as great as before. We need new thinking.

#### **K-FACTOR IS WHERE YOUR USER BASE REALLY KICKS IN**

So now is the time to investigate ways of leveraging your existing user base to share and promote your business to their

**“ACHIEVING THE GOALS YOU SET WHEN PLOTTING YOUR K-FACTOR IS ONLY GOING TO HAPPEN BY ITERATING REAPTEDELY OVER FAILURE UNTIL YOU FIND THE RIGHT TRIGGER”**

family and friends. Only your customers can open the door quickly and efficiently to new, free, high quality users.

#### **MODELLING USING K-FACTOR**

K-Factor has its roots in epidemiology: it's used to track the rate of growth of a virus or epidemic in a population.

The formula below helps you model the impact of virality provided you have the number of invites to start with.

$k = i \times c$  where  $i$  = Number of Invites, and  $c$  = Invites to users Conversation Rate

A formula that is more useful for established businesses is one that factors in only existing happy or qualified users, such as those who create an account, place a bet or use codes. What you define as a positive experience is specific to whatever industry you're in: only you can decide what metrics you use to profile a 'happy' user.

$k = (\# \text{ of positive experiences} * \text{Share rate}) * \text{Product Conversion Rate}$

You can quickly work out what focusing on viral growth through your user base would look like by creating a spreadsheet of your traffic/conversions and applying the formula above to it. From here you adjust rates of shares to pinpoint where the model becomes self-fulfilling.

What I mean by self-fulfilling is that the cumulative incremental impact of the viral growth at some point starts to increase your traffic and conversions without need to drive traffic.

Adjusting and tweaking the model is how you set your KPI's for growth.

#### **READ THIS BEFORE YOU HIT YOUR NUMBERS**

If we could package getting viral growth into a solution you wouldn't be reading this article - you'd be on a site buying the service that makes it happen. Unfortunately for us marketers,

obtaining the growth that you have worked out using K-Factor is a process of agile marketing woven through a strong product.

This being the case, you can imagine that if your product isn't delivering a valuable experience compared to your competitor then you will be unable to motivate a user to share your cause. If they didn't enjoy the experience they aren't going to subject their friends to that experience...to try to trigger viral growth in this environment is an exercise in futility - it will fail.

#### **DOING THE GROUNDWORK**

Trigger is the operative word. Frankly, what you have to do next is a bit dull, but 100% necessary. It's important that you build this as part of your operating processes and that you get your entire team on board.

#### **PROCESSES**

##### **Step 1**

You'll need to audit every stage of your product where your user engages and identify where they are likely to have a good experience - that's your trigger point! You may find more than one, so sift through the entire product experience.

##### **Step 2**

Select three types of triggers, for instance emotional, altruistic or transactional. By 'emotional' trigger, I mean something along the lines of asking the user for help or to tell people how much they love your product. For altruistic, ask the user to share the information to benefit someone else. For transactional, offer something tangible to the sharing party, the receiver or both.

##### **Step 3**

Run A/B tests across different triggers and each trigger point.

##### **Step 4**

Rinse and Repeat until you hit your targets.

#### **SUPER IMPORTANT POINT**

Okay, brace yourself: expect a 90% fail rate on most experiments. As I mentioned previously, marketing is a process not a solution. Do not expect this to work first time.

Achieving the goals you set when plotting your K-Factor is only going to happen by iterating repeatedly over failure until you find the right trigger.

Your trigger will be entirely specific to your business: competitors will be unable to copy you with the same effect. You will have built a long term competitive advantage. In which case, K stands for Kick-ass success. And that has to be worth investing in.

#### **K-FACTOR MADE SIMPLE**

##### **Stage One: Planning and KPI's**

- Model the effect and establish when the 'tipping' will occur
- Set Share Rate KPI using this model

##### **Stage Two: Execution and Iteration**

- Identify and Create Trigger Points
- Decide on Triggers
- Run Experiment

Iterate > Experiment > Iterate

# BIG QUEST? ON

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Have ad blockers had an adverse effect on your affiliates? And if so how do you advise affiliates to deal with the problem?

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## LEE-ANN JOHNSTONE

CEO, Best Odds Marketing

*"Affiliates need to get savvier about the way they present their own site and advertise for new traffic sources via third parties online"*

Ad blocking is part of our emerging digital landscape and is something which cannot be ignored. Although data from the recent Internet Advertising Bureau's Ad blockage usage report shows that on average 1 in 5 UK adults uses ad blocking technology the rate of download has remained constant. There was very little movement of this behaviour increasing over the past 12 months. Consumers still want and expect to be connected with offers, deals, and promotions when engaging in online browsing. Therefore this ad blocking will certainly not succeed in "Killing off affiliate marketing" in its entirety.

Affiliates need to get savvier about the way they present their own site and advertise for new traffic sources via third parties online. Obtaining new traffic sources is the core of their function and what drives their revenue metrics longer term. Whether they are highly reliant on search (or social) to drive traffic, paid media will always be a part of the marketing mix and therefore understanding the impact of ad blockers and finding ways to combat these deterrents is what will spear head continued growth.



## PAUL DERWIN

Owner, SelectaBet

*"As a consequence of banner-blindness... affiliates are already dealing with how to convert traffic without relying on banners"*

No, we've always used banner ads very sparingly on our sites, instead we've focused on regular, rich content within which we place contextual links to drive affiliate conversions.

Increasingly we've found that users are becoming more and more blind to banners and where we do have them on our sites it's often to fulfil the requirements of agreements we have with operators. Some Affiliate Managers like to see their banners in prominent positions and in terms of brand-building that's fine but they massively under-perform in comparison to content-driven links and editorials on offers and bonuses.

One way we've found to counter ad blockers is to create our own operator 'banners'. They're effectively just JPGs with a tracking

hyperlink but go undetected by blockers and they give us the added advantage of being able to apply our own, consistent design in line with our sites which makes them feel less intrusive to the user. We always try to design our banners in accordance with the operator's own brand guidelines and it means we can create banners at specific sizes and with targeted offers to suit our own needs.

As a consequence of banner-blindness, ad-blockers and with the surge in the number of social affiliates in the last few years banners are becoming more redundant so it appears that affiliates are already dealing with how to convert traffic without relying on banners.



# OSTRICHES NO MORE: THE IGGA

Ask any one man band affiliate what the principle perks of their career choice are and you'll likely hear responses pertaining to operating with great freedom and flexibility on the fringes of an ever-increasing corporate world.

The reality of the corporatisation of the iGaming space is a blend of consolidation and regulation - two things that represent the most significant threats to the affiliate industry, which has, since day dot, acted as by far and away the largest player acquisition channel for online gambling operators.

The independence that an affiliate has long since commanded is something that almost every webmaster I've worked with treasures above almost anything else - I'd put it on a level with or ahead of the riches many have accrued. It has certainly become one of my measures of true success. Whether operating as an individual or employing hundreds, this operational autonomy fosters the ability for and agility of an affiliate to harness new technologies, which has seen them remain a vital cog in the player/operator ecosystem.

However, from this independence has derived a compulsion to bury heads in the sand. Affiliates of all sizes have, often out of contractual necessity, leant on operators to guide them through legislative minefields surrounding advertising standards, point of consumption tax, ePrivacy and engagement with potentially self-excluded customers - and that's the UK story alone. For those focusing on markets with increasingly darker shades of grey, the modus operandi has been make hay whilst the sun shines.

These positions are unsustainable - quite possibly even in the short-term. With ever increasing pressures effecting operating margins for operators, the subjugation that affiliates find themselves bound to can and will see them whittled away from the player/operator ecosystem unless they present a united front that creates structure, solidarity and regulatory and legislative acceptance for affiliate activity. There has been consolidation in the affiliate space which ought to assist this, but consolidation of any sort tends to prioritise short-term tactical initiatives to demonstrate ROI rather

than a greater vision to sustain business and the industry in the long-run. There is also evidence that consolidation of affiliates is leading to more friction between operator and affiliate, rather than easing it.

The International Gaming Affiliate Association - or iGAA - is being established to set a Code of Practice and structure by which the iGaming affiliate industry can effectively present itself as a self-regulated marketing channel to existing and prospective regulators around the world. Affiliates will sign up to a broad Code of Practice and fluid subcodes delivering specific market and activity guidance to ensure members continually act in accordance to existing local and international law. The code and subcodes will be derived from roundtable discussions and input from founding membership, to which any affiliate may apply.

As a non-profit organisation set up using a similar structure to the UK's Senet Group, the iGAA will have its roots in the UK, but will rapidly seek to develop internationally. This structure will empower the association to act as a viable sounding board for governments, regulatory bodies and operators around the world and to assist in providing advice to best safeguard the interests of players by continuing to grow affiliate marketing as a source of customer information and acquisition. Any previous effort at establishing associative bodies has been flawed by commercial strategy. This is a pitfall that we must - and will - avoid.

Establishing the iGAA as a credible trade association is a mammoth task, if the vast array of concerns and questions I have already fielded is anything to go by. There is a requirement for an astronomic range of strategic and cultural differences, as well as competition, to be set aside for the greater good of an industry that has quite deliberately operated on the edge. For this to be realised, it is vital that a critical mass of affiliates - particularly those most visible from a political and a traffic perspective - come on board as founding members to draw up and strive to continually improve operational practice standards by which membership will be held accountable to.

**TOM GALANIS**  
Director, TAG Media



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