

Results for the Year ended 31 December 2008



30 March 2009

Agenda

Gigi Levy

- Introduction

Aviad Kobrine

- Financial Review

Gigi Levy

- Operating Review
- Regulation

**Gigi Levy &
Aviad Kobrine**

- Summary and Q&A

Introduction



Highlights †

- Total Operating Income up **21%** to **\$263m**
- Total Operating Income Casino up **15%** to **\$139m**
- Total Operating Income Poker down **4%** to **\$79m**
- Total Operating Income Emerging Offering up **208%** to **\$45m**
- EBITDA^{1,2} up **23%** to **\$56m**
- PBT¹ up **6%** to **\$49m**
- Basic EPS¹ up **8%** to **13.4¢**
- Final Dividend of **2.9¢**, Total Dividend 2008: **5.4¢**
- Net Cash from operating activities up **22%** to **\$56m**
- Cash at the year end at **\$98m**

¹ Excluding share benefit charges ² Excluding Forex impact. † All figures in this presentation are extracted from 888's financial statements as published where available. Totals may not sum due to rounding.



Financial Review



Profit and loss account

\$m	2008	2007	% Change
Total Revenue	256.9	213.4	20%
Other operating income	5.7	3.6	-
Total Operating Income	262.6	216.9	21%
Operating expenses ¹	77.3	59.1	
Research and development expenses	27.4	23.5	
Selling and marketing expenses	80.2	70.9	
Administrative expenses ^{2,3}	22.0	17.9	
Total expenses	206.8	171.4	
EBITDA^{2,3}	55.7	45.5	23%
Depreciation & Amortisation	(7.3)	(5.8)	
Interest / FX	0.3	6.1	
Profit before tax²	48.6	45.8	6%
Taxation	(3.1)	(3.2)	
Profit after tax²	45.6	42.0	
Earnings per share^{2,4}	13.4¢	12.4¢	8%

Final Dividend 2.9¢; Total Dividend for the year 5.4¢

¹ Excluding Depreciation and Amortisation

² Excluding share benefit charges

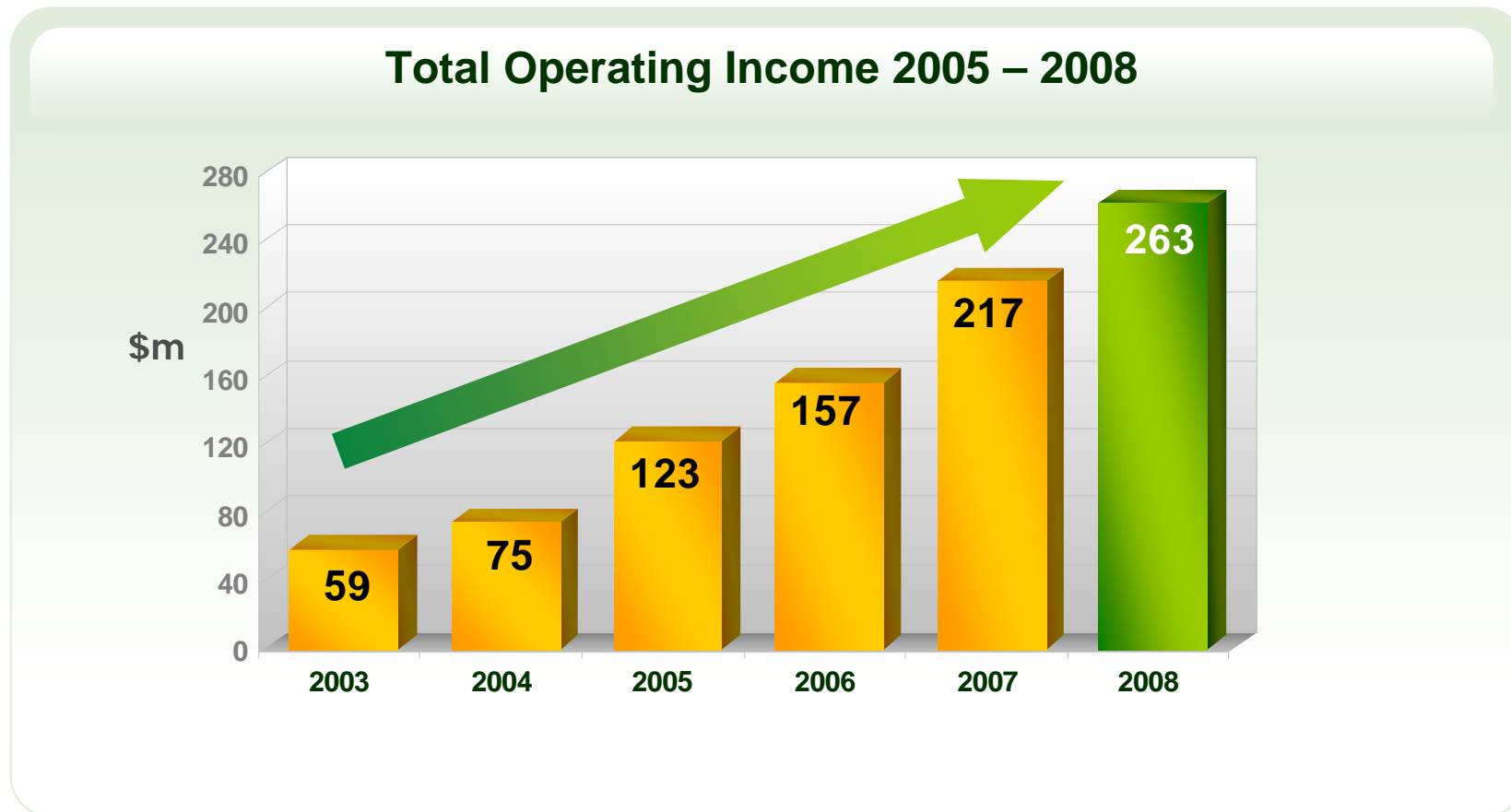
³ Excluding Forex impact

⁴ Basic earning per share



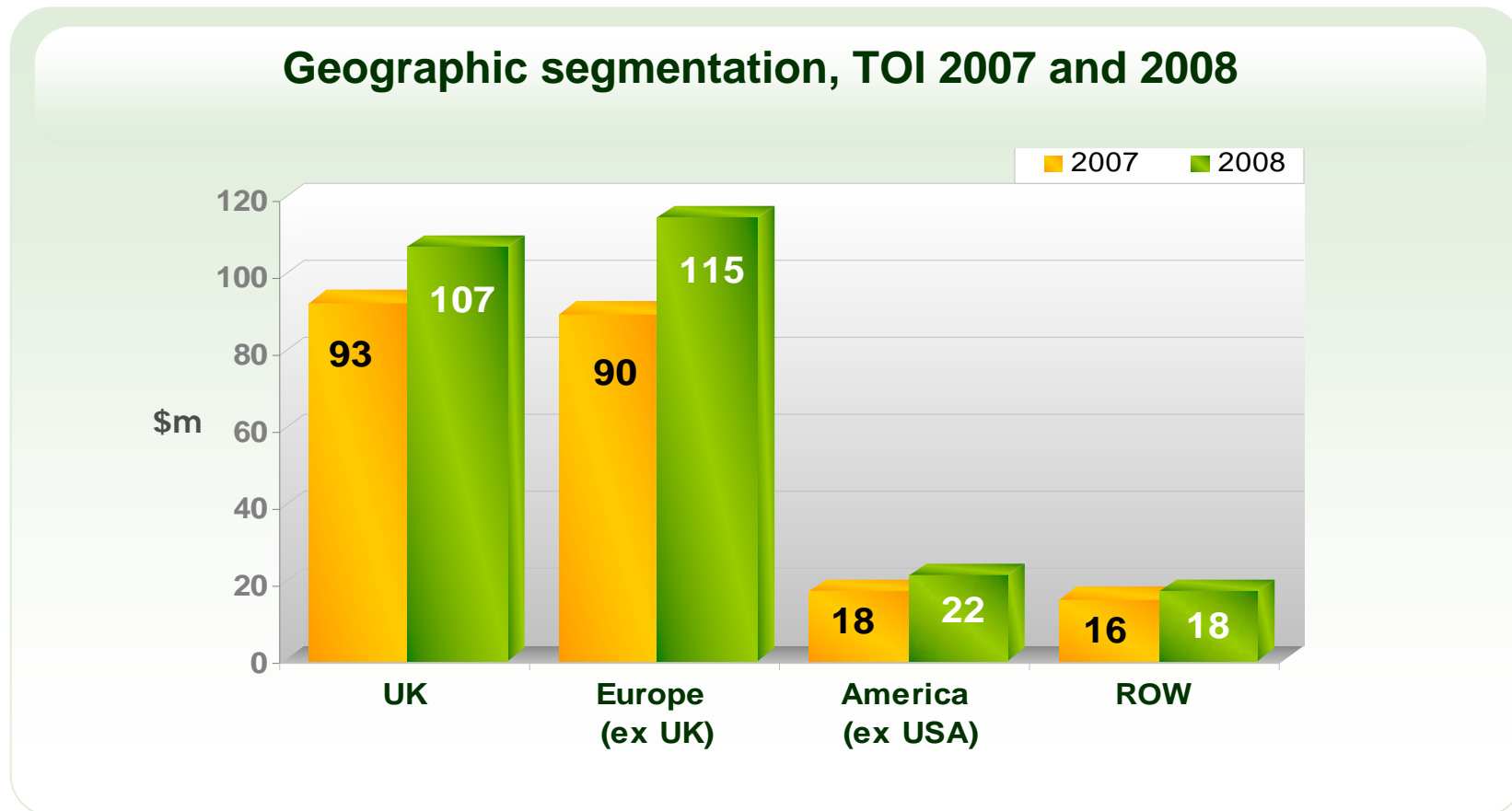
Total Operating Income

- Strong 2008 Total operating income growth - **\$263m** (2007: **\$217m**), an increase of **21%**
- Consistent annual growth, CAGR of **35%** years 2003-2008



Geographic segmentation

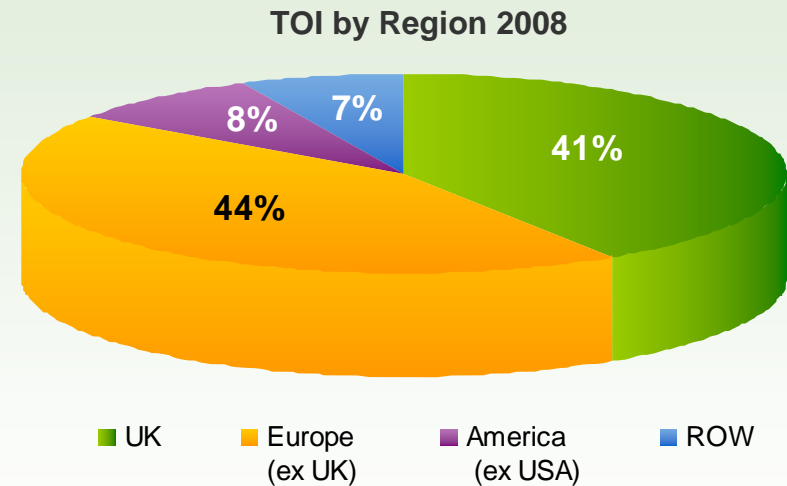
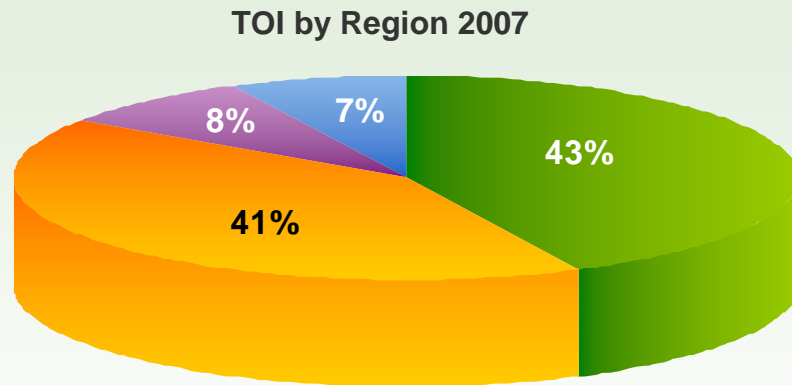
- Growth in all regions in 2008 vs. 2007
- Strong growth in Europe (ex. UK) up **28%**, **23%** in Americas, **16%** in UK and **13%** in ROW



Geographic segmentation

- Europe (ex. UK) became the largest market **44%**, UK now **41%**

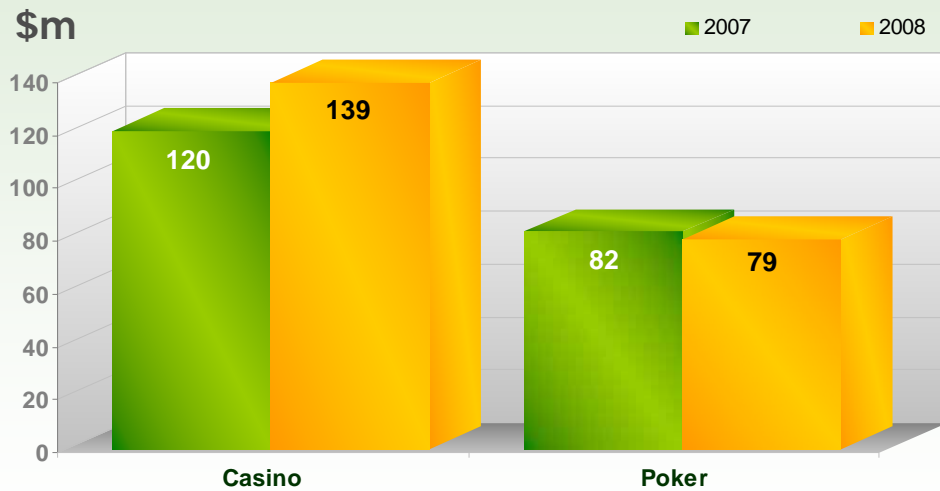
Geographic segmentation, TOI 2007 and 2008



Total Operating Income by Segment

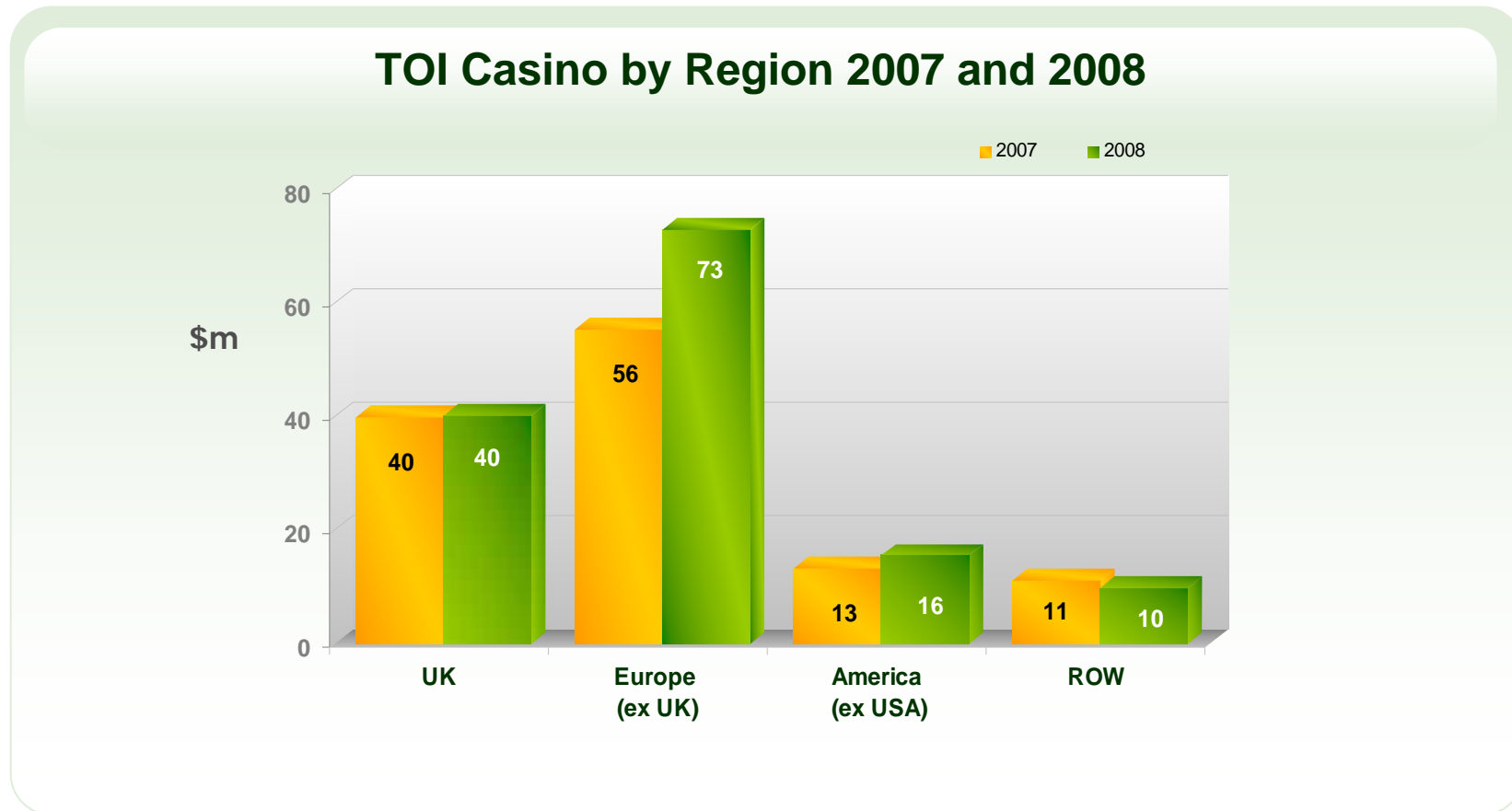
- TOI Casino up **15%** to **\$139m** (2007: \$120m)
- TOI Poker down **4%** to **\$79m** (2007: \$82m)
- TOI Emerging Offering up **208%** to **\$45m** (2007: \$14m)

Total Operating Income by Segment 2007 and 2008



Total Operating Income Casino

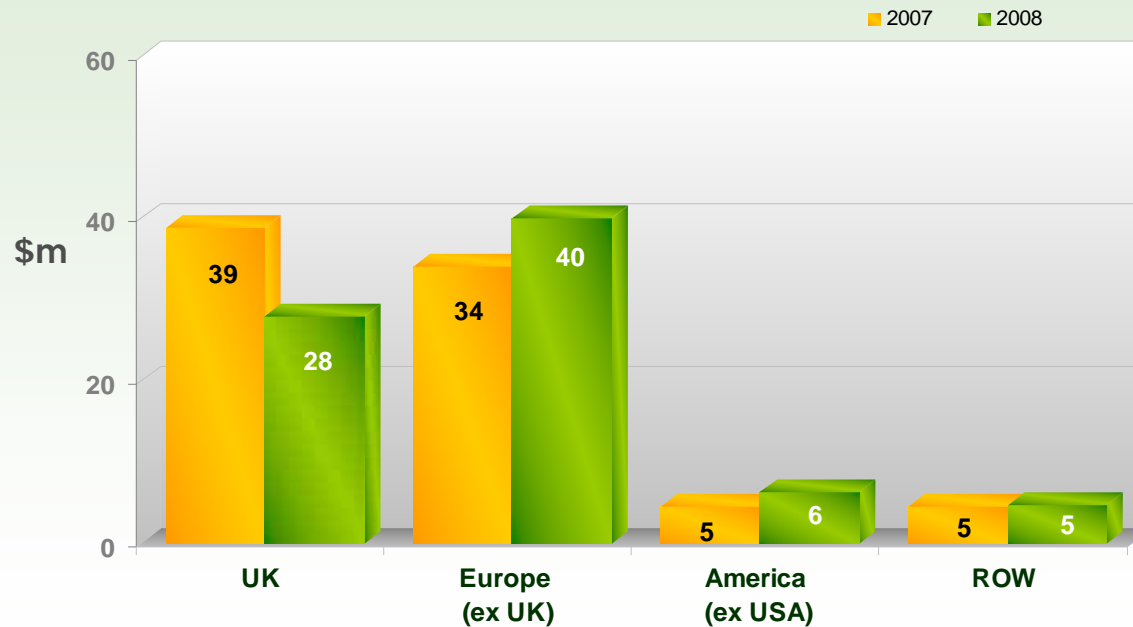
- TOI Casino Europe (ex. UK) up **31%**, Americas (ex US) up **17%** UK similar, ROW down **12%**



Total Operating Income Poker

- TOI Poker up **36%** in Americas, **18%** in Europe (ex UK) and **4%** ROW , UK down **28%**

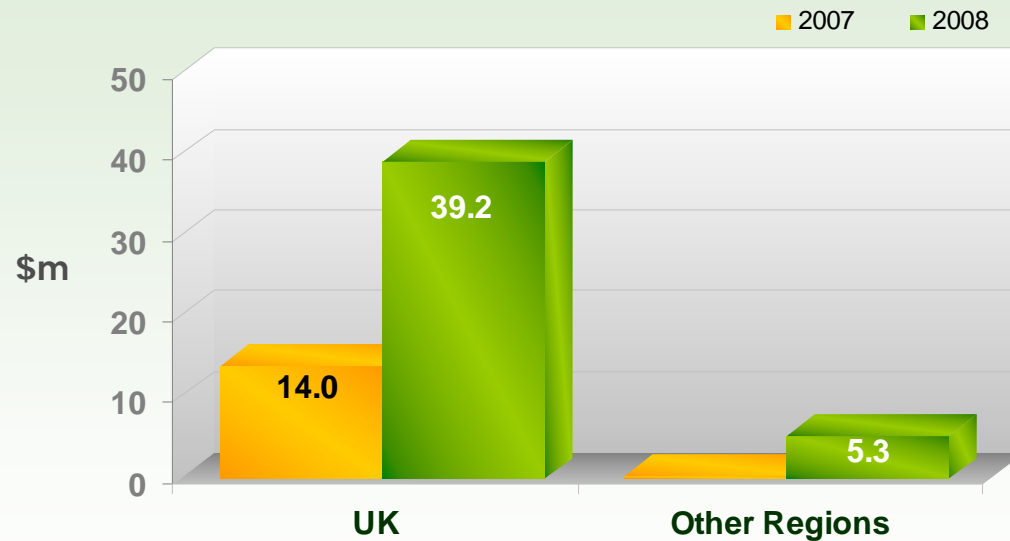
TOI Poker by Region 2007 and 2008



Total Operating Income Emerging Offering

- TOI Emerging Offering up **208%** to **\$45m** (2007: \$14m)
- TOI Emerging Offering UK up **180%** to **\$39m**, in Other regions **\$5.3m**

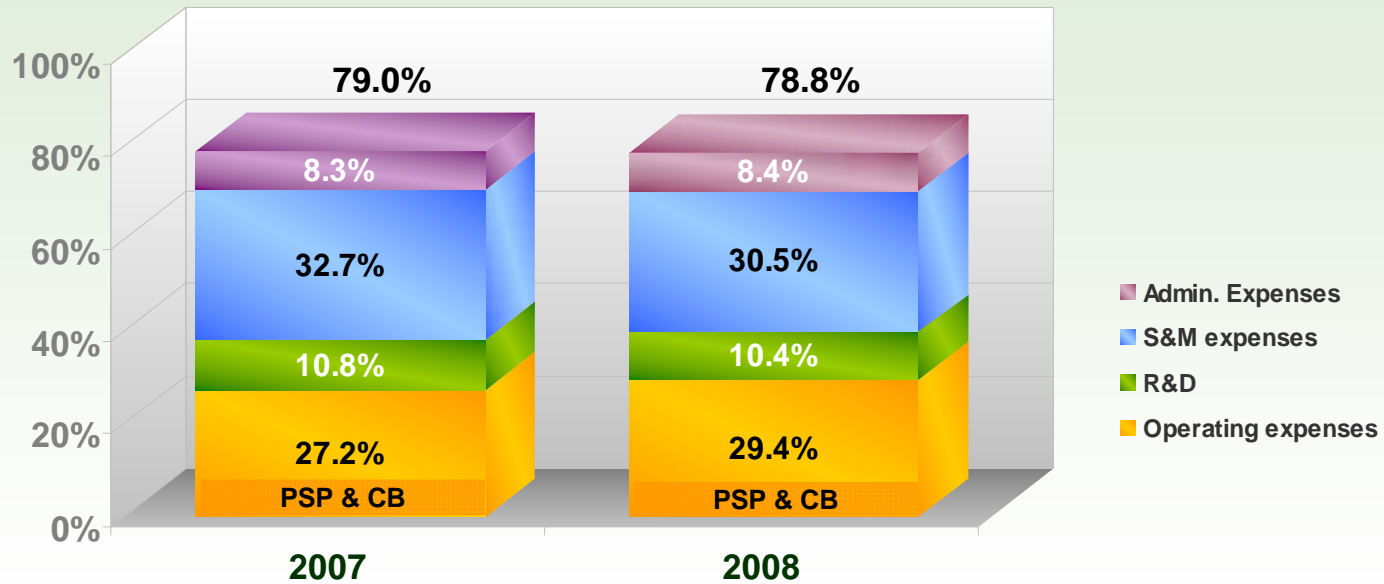
TOI Emerging Offering by Region 2007 and 2008



Costs Structure

- Costs ¹ slightly reduced to **78.8%** from Total operating income (2007: 79%)

Costs as % of Total Operating Income 2007 and 2008

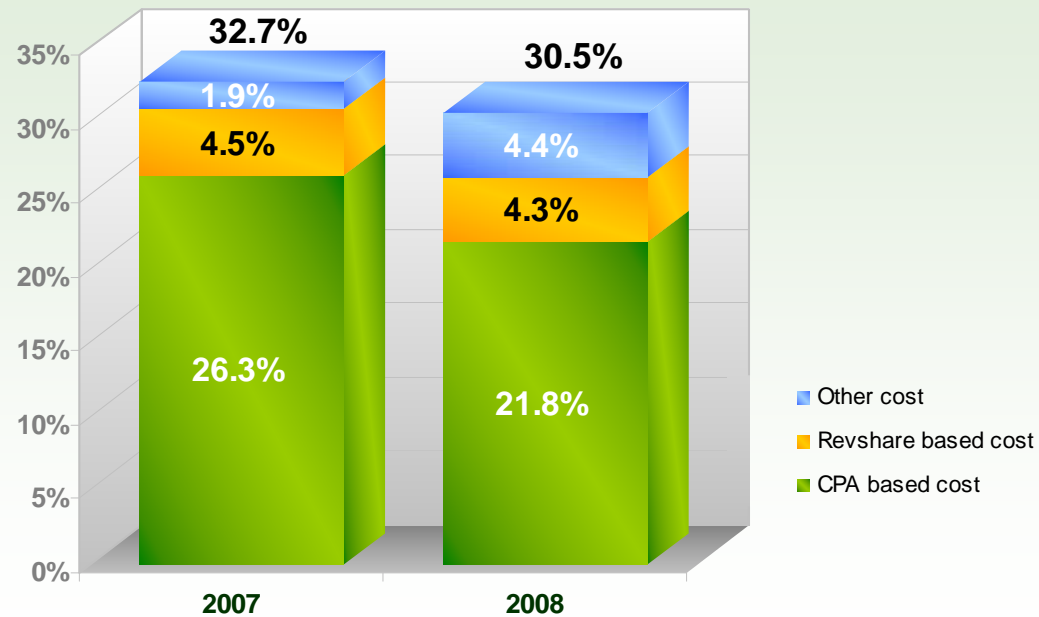


¹ Excluding share benefit charges depreciation amortisation and Forex;

Marketing Costs

- Total marketing costs at **\$80.2m** (2007: \$70.9m)
- 2008 Marketing costs represent **30.5%** of Total operating income (2007: 32.7%) – improved efficiency

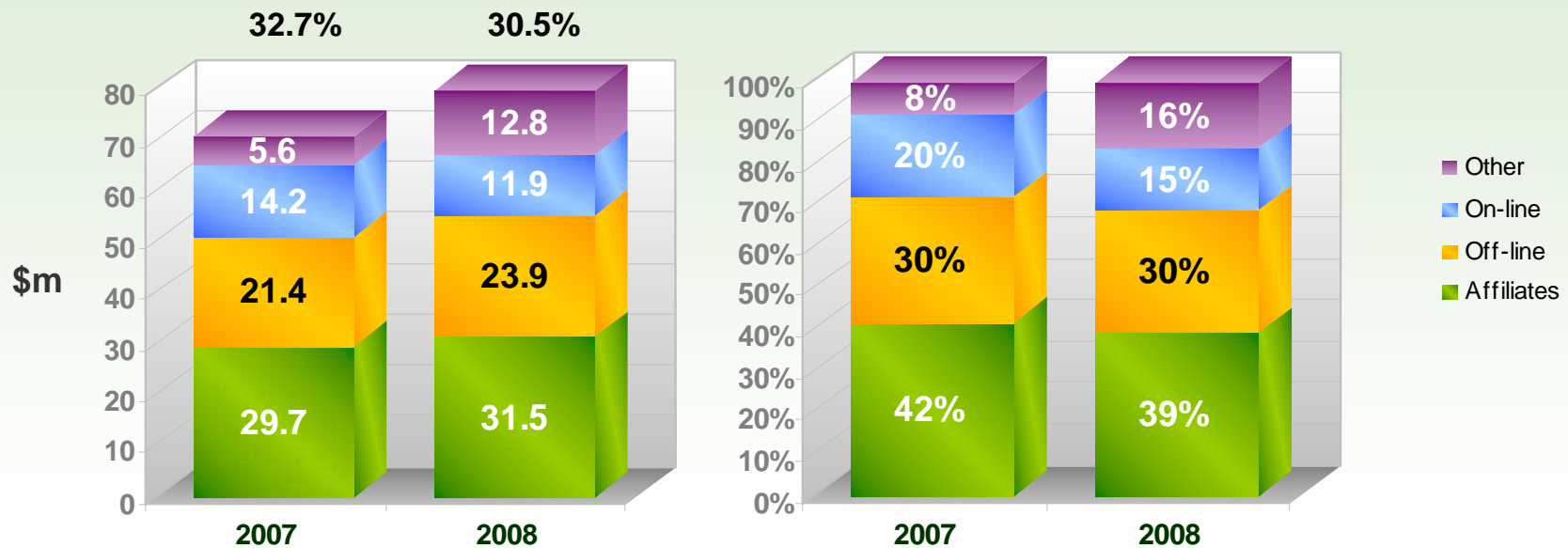
Marketing costs as % of Total operating income



Marketing Costs

- 2008 Casino and Poker FTDs **246K** (2007: \$263K)
- 2008 Casino and Poker CPA **\$232** (2007: \$225)

Marketing costs as % of Total operating income

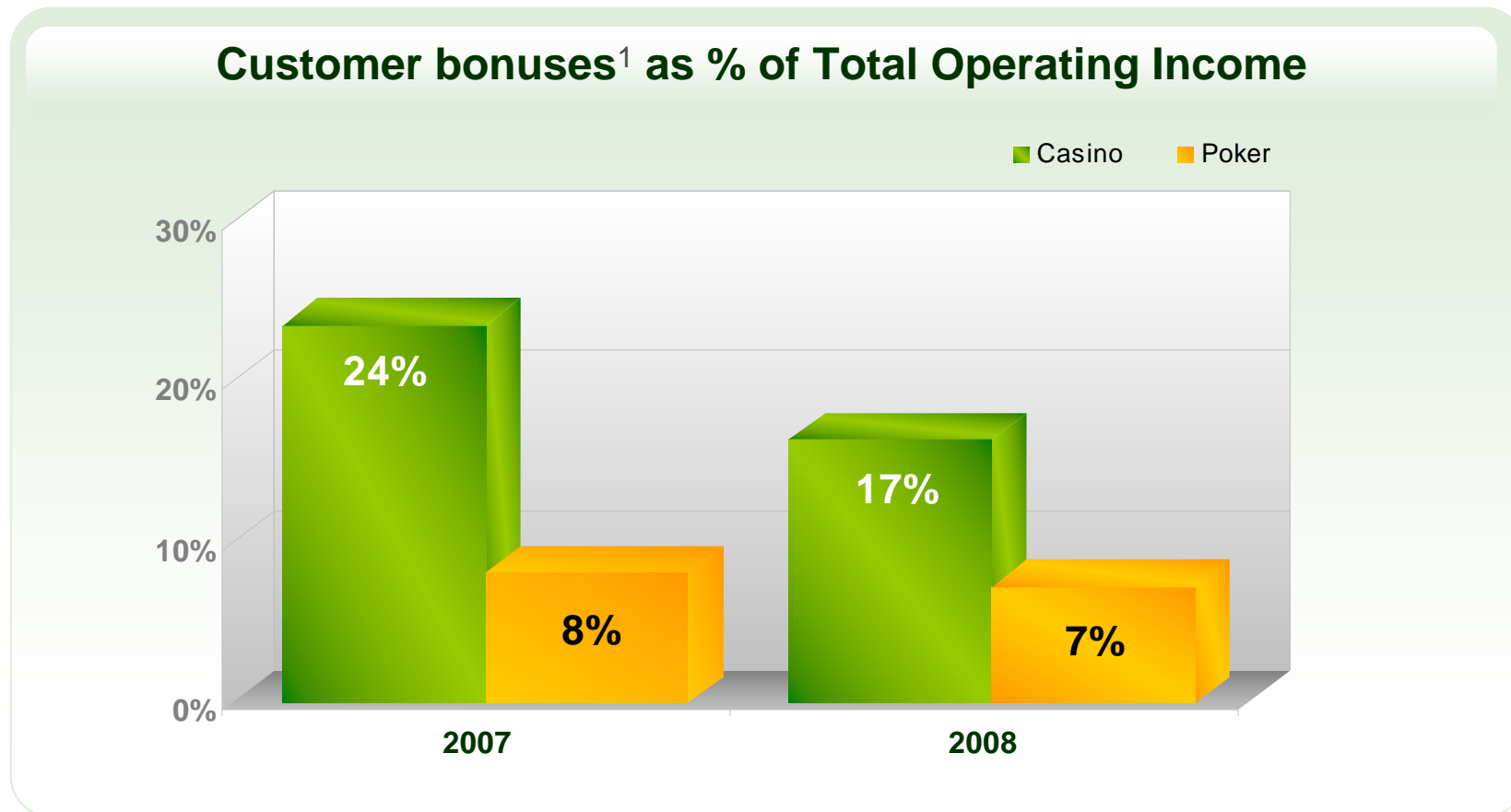


2008: \$80.2m (2007: \$70.9m)



Customer Bonuses

- Increased bonus efficiency
- Casino bonuses reduced to **17%** in 2008 from **24%** in 2007
- Poker bonuses reduced to **7%** in 2008 from **8%** in 2007

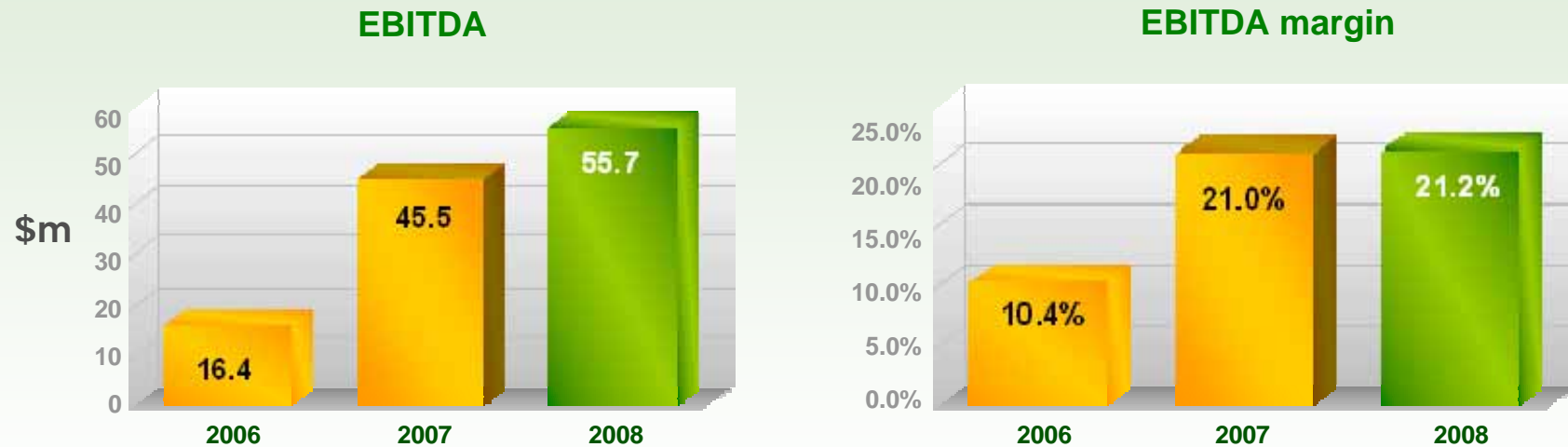


¹ Bonus excluding converted loyalty points

EBITDA and EBITDA margin

- EBITDA¹ up **23%** to **\$55.7m** (2007: \$45.5m)
- EBITDA¹ margin **21.2%** from Total operating income similar to 2007 (2007: 21.0%)

EBITDA* 2006 - 2008

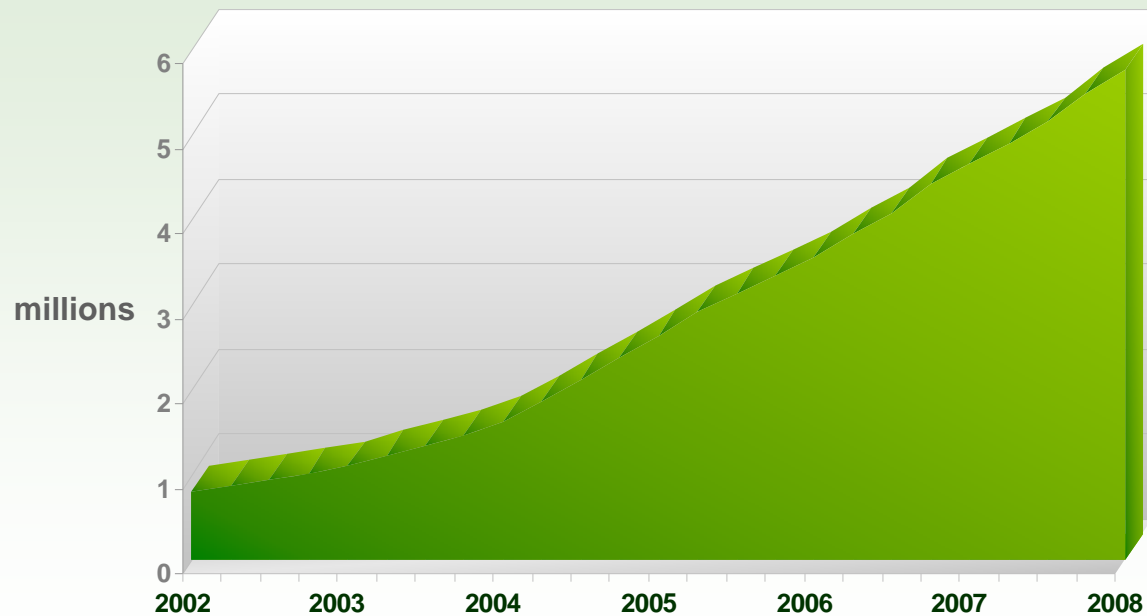


¹ Excluding share benefit charges

Strong Real Money Registrations Growth

- Registrations increased **24%** reaching **5.8** million at year end 2008
- Quarterly CAGR of **8.6%** between Q1 2002 to Q4 2007

Real Money Registrations Q1 2002- Q4 2008



Balance sheet as at 31 December 2008

\$m	2008	2007
Non-current assets		
Intangible assets	44.8	40.7
Property, plant and equipment	19.7	16.5
Financial assets	0.2	0.7
Deferred tax	0.6	0.5
	65.4	58.4
Current assets		
Cash and cash equivalents	98.4	104.3
Trade and other receivables	18.7	19.5
Total Assets	182.5	182.2
Equity		
Share capital	3.1	3.1
Retained earnings / reserve	108.2	89.6
	111.4	92.7
Liabilities		
Current liabilities		
Trade and other payables	37.9	63.0
Liabilities to customers	33.3	26.4
Total equity and liabilities	182.5	182.2

Unlevered balance sheet



Cash flow statement

\$m Year to 31 December	2008	2007
Cash flows from operating activities		
Profit before tax	40.2	37.4
Share benefit charges	8.4	7.8
Profit before tax and Share benefit charges	48.6	45.2
Depreciation and amortisation	7.4	5.7
Interest received	(3.3)	(5.4)
Change in current assets and liabilities	8.0	3.7
	60.8	49.2
Tax paid	(4.4)	(3.0)
Net cash generated from operating activities	56.4	46.2
Net cash used in Investing Activities	(36.7)	(20.0)
Dividends paid	(25.6)	(36.2)
	(25.6)	(36.2)
Net decrease in cash and cash equivalents	(5.9)	(10.0)
Cash and cash equivalents - beginning of year	104.3	114.4
Cash and cash equivalents - end of Year	98.4	104.3

Operational Review



Our 2009-2010 strategy



The challenge

**“The trouble with our times is that
the future is not what it used to be”**

Ambroise **Paul** Toussaint Jules **Valéry** (1871 –1945)
French poet, essayist, and philosopher



- The risks
- How will we handle the risks
- The opportunity



The risks



It's a new and risky world out there for all companies

- Unprecedented economic crisis
- Frantic consumer behavior
- Risky structural changes
- No second chance with customers
- No competitive advantage is safe

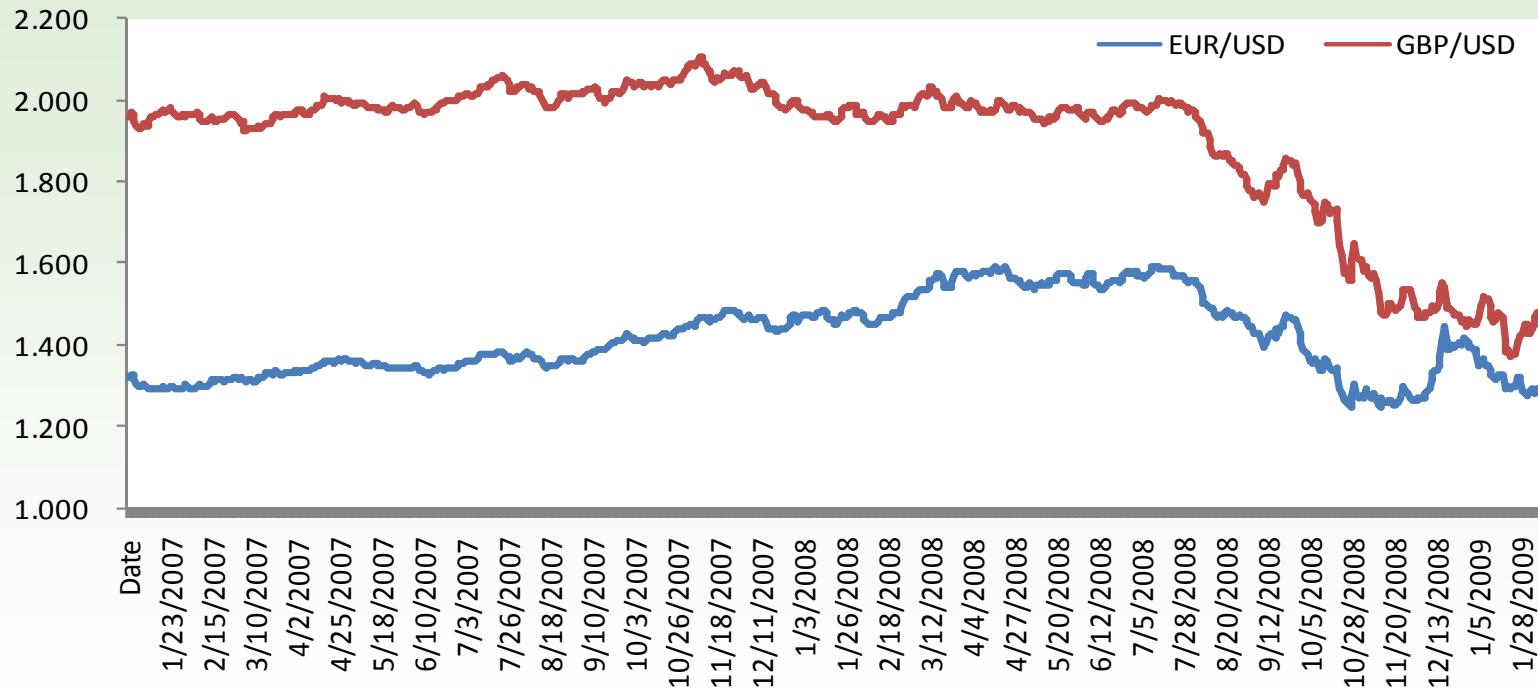


888.com
—Enjoy the game—

The impact of the world economic crisis

- Less disposable income at all customer levels
- Especially VIPs
- Exchange rate impacts \$ reported revenues
- Consumers looking for more value
- Reduced costs in GBP, Euro and NIS
- Similar for most players

Currency Trend since Jan 2007



Source: www.oanda.com

**How will we
handle the risks**



We will not be slow...

- We realized the world has changed
- We plan on new CPA-LTV 'equations'
- We focus on increasing share of wallet
- We strive for operational excellence
- ... and costs efficiency
- We will accelerate B2B



What are we doing in B2C

- Improved acquisition – especially conversion
- Phenomenal CRM
- Better products with more innovation
- Improved localization and focus on emerging markets
- Better value for money = more 'entertainment value'
- New business models
- Local licenses



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NOW IN YOUR LANGUAGE.

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Don't forget, when you make your first deposit as a new member, you'll be treated to a sensational Welcome Bonus of 100% up to \$400, free entry to seven \$500 Depositors' Freerolls and a seat in our exclusive \$100k First Depositor's Challenge which could be your ticket to a share of \$100,000!

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ΚΙΤΟΣ mas. mas.	Аsremi	Stahout	Laad alla	Letitit	オマシ mas.
Asu mas. Paber mas. Laba	Kis mas. Tog mas. Jes mas.	Tek mas. Tos mas. Polis	Novi mas. Dipon mas. Dipon mas. Dipon mas.	Am mas. Tos mas. Paber mas. Paber mas.	
Atslashti	Ujupielati	Pobierz	Descarcă mas.	Заграти	

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Suspendisse dignissim enim nec lectus. Cras adipiscing, purus ac commodo, eros ante ultricies diam, non viverra uma velit ut nulla. Cras sociosque facilisis in. In hac habitasse platea dictumst. Curabitur ultricies lectus ac libero. Maecenas metus in ultricies varius, odio nibh pharetra justo, eu pretium nibh mi sit amet. Sed et pede vel dui ultricies placerat. Ut ac nunc sed orci occumsen volutpat. Etiam et eros at orci ultricies sollicitudin. Nunc.

LEARN MORE

Alex
Alex Roign
Promotions Manager

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If you no longer wish to receive our email updates, please send a blank post to: unsubscribe@888.com
Our principal postal address is: Suite 602/703 Europark, Europark Avenue, Gibraltar

Segmentation Tools

The screenshot displays the 888 Casino Lobby interface. At the top, it shows "Connected" and "Casino Lobby" in the browser window title. The main area features a green background with various game icons: Roulette, Classic Slots, Video Slots, Video Poker, BlackJack Games, and Games. A central pop-up window is overlaid on the interface, containing the following text:

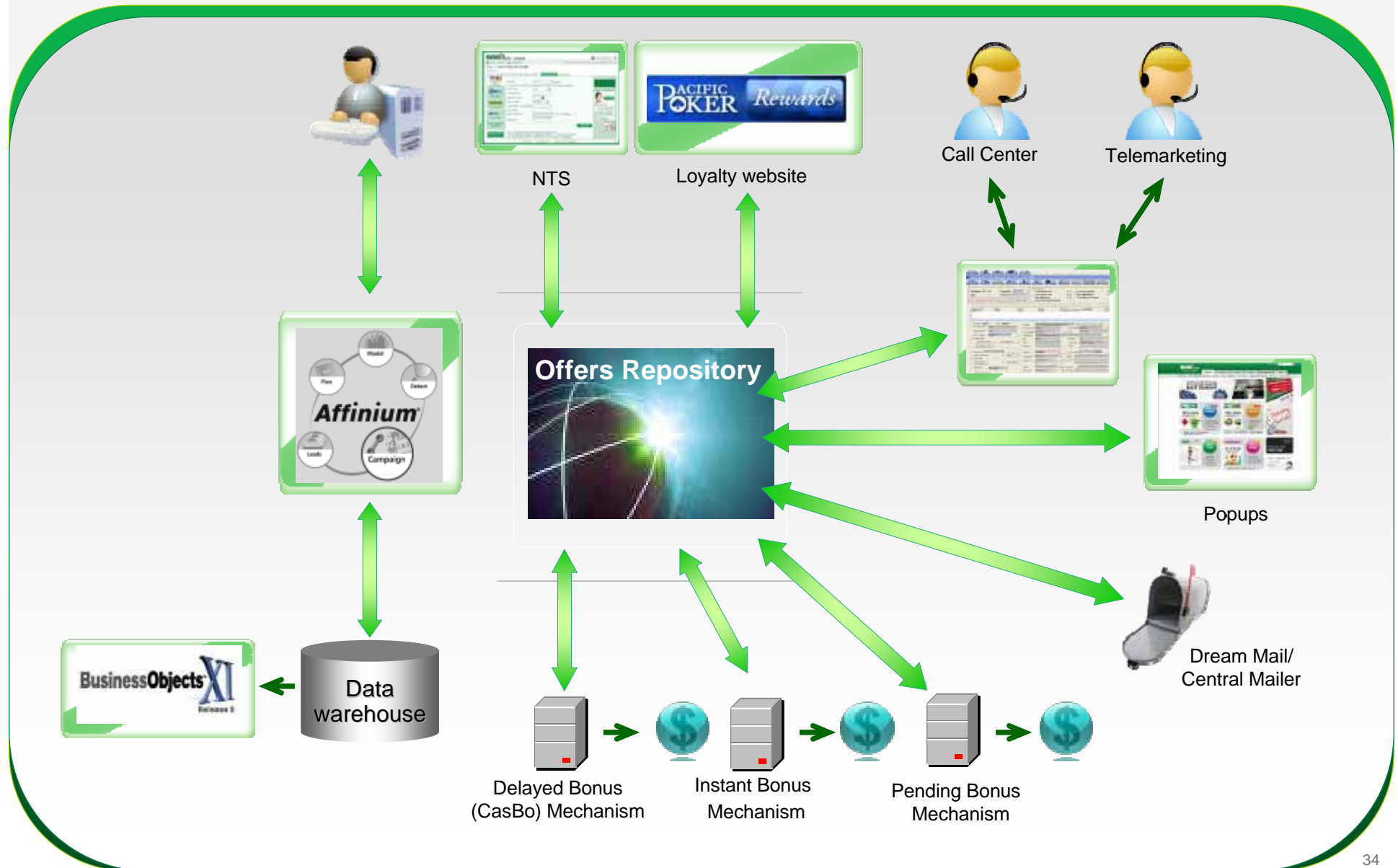
48 hours limited time offer
Get a special bonus of up to \$250!
Promotion code:
"48Hours"

Below the pop-up, there are icons for Featured Jackpots, including Jackpots Arena (\$2,857,227.53) and Caribbean Poker (\$216,444.81), and other games like Triple Card Poker and City Life Video Slot.

On the right side, there is a user profile section for a "VIP Diamond" user, showing the time as GMT: 16:02 and a "Hello VIP user" message. Below this are sections for "CALENDAR EVENTS" (Video Poker Tourname, 8 Mar - 9 Mar, 00:00 - 23:59 GMT+) and "JACKPOT WINNERS" (Florin M. from Romania). There is also a "VIP 24/7 LIVE CHAT SUPPORT" button and an "Online Help" link.

At the bottom left, there is a "CASHIER" section showing a balance of \$ 0008.89. The bottom navigation bar includes links for "Help", "Contact Us", "About Us", "My History", "My Favorites", "Settings", and "Logout".

Campaign management



Online Viral Promotion

PCP through Facebook



Local Promotions

Choose a shirt from one of the leagues shown below... and catch the football fever now!



ENGLISH PREMIER LEAGUE

LIGA BBVA

BUNDESLIGA



LIGA BBVA

BUNDESLIGA



Choose a shirt from one of the leagues shown below... and catch the football fever now!



BUNDESLIGA



When cut and the lines have been painted... **Football fever's back!**

It has finally returned and with 10 months of great games ahead, 888sport is giving you a chance to get involved in the action by winning your team's shirt and match tickets for you

Choosing your team's shirt is as easy

as choosing your team's shirt simply follow the steps from September 12 – November 9:

1. Choose the shirt you'd like by clicking on the button or choose a shirt from one of the leagues shown above.

2. Enter the required information.

3. Place your 20 bets (minimum £20 each) at

[888sport](#) to catch the football fever now!



... **Football fever's back!**

With 10 months of great games ahead, 888sport is giving you a chance to get involved in the action by winning your team's shirt and match tickets for you



... **Football fever's back!**

With 10 months of great games ahead, 888sport is giving you a chance to get involved in the action by winning your team's shirt and match tickets for you



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Search: the web pages from the UK

Web Results 1 - 10 of about 415,000 for 888 poker. (0.05 s)

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PokerStars \$50 Bonus
The world's largest poker site. Sign up and get \$50 Free.
www.PokerStars.com

Circus Casino
Welcome To Circus Casino
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Snowed in? Don't Worry
Play Poker at Home With PartyPoker
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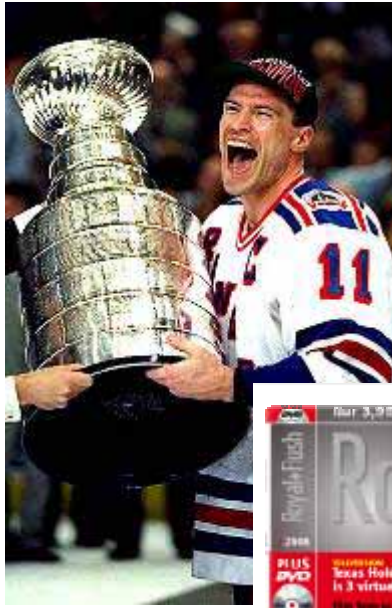
Online Casino & Online Poker Room - 888.com
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Shane Warne, Mark Meisser, Michael Keiner



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INTERVIEW
Chris Ferguson

KEINER SPRICHT KLARTEXT
Interview & Porträt mit dem Weltmeister

TURNIERE & EVENTS
IPT Kopenhagen,
IPT Warschau &
Spring Poker Festival

INTERVIEW
Chris Ferguson



Focusing on generating even more trust

888safe
Homepage | Behind screens | Fair gaming | Safe deposits | Data security

"At 888.com we believe that entertainment and safety come hand in hand. Our player's welfare, has always and always, will come first..."
Gigi Levy, CEO
888 Holdings PLC

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Revealed:
The measures we take to keep our games totally fair, random and regulated.
- Safe Deposits**
Safety First:
Find out how we ensure that every deposit made remains safe and secure.
- Data Security**
The law is on your side:
Rest assured that your personal details are in the right hands and are always protected.



Industry Awards 2008

- **Operator of the Year /** Leisure Report Awards 2008
- **Best Betting and Gaming Company /** Leisure Report Awards 2007 & 2008
Leisure Report is the definitive news and intelligence service for the fast-moving leisure industry in the UK and Euro
- **Casino of the Year /** eGaming Review Awards 2008
- **Bingo Operator of the Year /** eGaming Review Awards 2008 (888Bingo won 3 awards).
- **Land-Links Partnership of the Year /** eGaming Review Awards 2008
- **Top Casino of the Year /** Gambling Online Magazine Awards 2008
- **“Eight” magazine - Influential Most Effective Membership Title /** APA Effectiveness Awards 2008. The APA awards are given by the Association of Publishing Agencies in the UK



How do we accelerate B2B

- Continue investing in infrastructure
- Focus on sales
- Excel with current customers
- PR – make sure our success is known to all
- Continue delivering real value



eGaming B2B Competitive Landscape – the big opportunity

Providers



888.com

Party,
BWIN

Gtecg,
Crypto-
Logic,
Micro-
gaming,
Playtech

Chartwell,
Orbis,
CTXM



Services

Advanced Services

Online/offline marketing, management of affiliates, SEO, branding, business analytics

Operations

Call Center, Telemarketing, Business operations, Payments processing, Hosting, Web etc.

Technology

Games (Casino, Poker, Sport, Bingo, Soft games, Live Dealer) and Back office (CRM, affiliates, reporting, fraud/risk etc.)

Our New Structure – Separated Business Units

888 Holdings
CEO
Gigi Levy

B2B
SVP, MD
Gabi H. Campos

B2C
SVP, MD
Adi Soffer – Teeni

HR & GO
SVP Sigal Srur

Finance
SVP, CFO
Aviad Kobrin

Technology
SVP CTO
Tal Elyashiv

Support and B.O
SVP Eran Gonen

Offering
SVP Itai Frieberger

B2B casino offers choice to operators

- Video Slots
- Classic slots
- Progressives
- Video poker
- Live Dealer
- Branded games
- Table Games
 - Roulette, Craps, Baccarat, Keno



Tailor to your target market

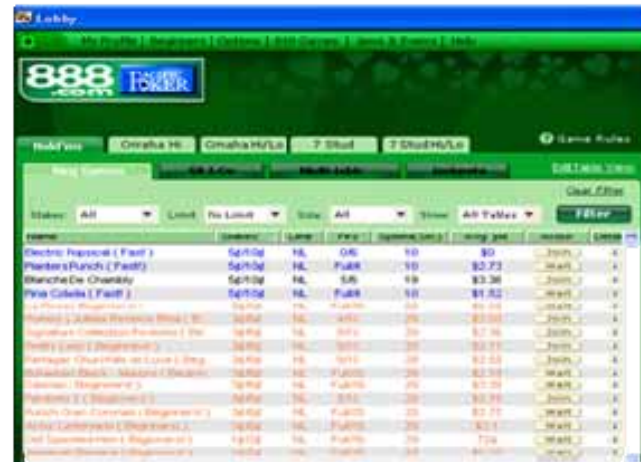
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Through Games and Content Partnerships



More than 1,000 games available for integration

B2B Poker network – full customization



888B2B

Huge Bingo footprint



Think Bingo



Mirror Bingo



Bingo Scotland



Foxy Bingo



Wink Bingo



Think Bingo Plus

888B2B

First B2B sport implementation

The screenshot shows the GAME ON betting.com website. The header includes the logo, navigation links (Sportsbook, Casino, Poker, Bingo, Backgammon), and a search bar. A large banner at the top reads "PREDICT THE WINNER" with a sub-headline "Check our prices for all our prices for today's racing action, including a range of ante-post markets from around the world." Below the banner is a login section and a "Live Scores" link. The main content area features a "Bet Slip" section, a "Today's RACING" section with a "Next Live Events" sidebar, and a "Next Horse Racing" section. The central focus is the "India v Australia Live!" match page, which includes a live score of 100-0 and a "Next Live Events" sidebar.

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Time	Match	Home	Draw	Away	More
10:41	AaD Aalborg v Viborg	7.0	3.1	2.6	More
10:45	Atenskiy Penobence	2.7	1.24	1.01	More
10:45	BATE Barisov v Zhetysay	14.5	1.25	10.11	More
10:45	Celtic v Manchester United	9.2	2.0	4.0	More
10:45	Dynamo Kiev v Porto	8.5	21.8	9.6	More
10:47	Flamengo v Bayern Munich	11.0	11.5	1.50	More
10:45	Lyon v Steaua Bucharest	1.0	7.0	8.0	More
10:47	Real Madrid v Juventus	8.15	1.35	5.1	More
Thu. 6th Nov, 2008					
10:45	Manchester City v Twente Enschede	2.5	3.1	1.30	More
10:45	Slavia Prague v Aston Villa	2.1	3.4	6.5	More
Fri. 7th Nov, 2008					
10:45	Leeds United v Northampton Town	4.7	5.0	5.1	More

888B2B

Modular Pricing

- Divided into 4 categories:
 - License
 - Software
 - Payment management system
 - Extras: soft games, poker school, languages, chat room, jackpot, etc

Category	Pricing model
Software License Fee	% NGR
Player Retention Mgmt	%NGR
Affiliate and SEM Mgmt	%NGR
Marketing Mgmt	%NGR
Transaction Processing	Cost +
Fraud Mgmt	Cost+
Call Centre	Cost+
Hosting	Cost+
Set-up, integration, languages, etc.	Cost+

Latest B2B Deal – Racing Post

- A new B2B deal with the Racing Post
- RC is the Pre-eminent horse racing industry publication
- Monetise RC's vast media assets and loyal audience
- Leverage 888's Online capabilities



Dragonfish
an 888 company

Dragonfish
Total Gaming Services
an 888 company

Dragonfish

Total Gaming Services an 888 company



Some of Our B2B customers



How do we leverage our Casino

- Increase interest and fun
- More interesting promotions
- More games – the long tail
- Multi currency to all customers
- Improve no-download
- Ensure we keep VIPs
- Leverage in B2B



Live Dealer for Europe Launched



FPS:



What are we doing in Poker

- Working to Increase market share
 - Improving product and innovating
- Building our brand:
- A great B2C operator
 - The best B2B network
- Adding liquidity through:
 - B2C excellence
 - B2B aggressive sales

Poker 5.4 – New features With new Loyalty program

The screenshot displays the 888.com Pacific Poker website interface. The top navigation bar includes links for My Profile, Beginners, Options, 888 Games, News & Events, and Help, along with location and time information (USA, 08:44, 888.com, 12:44).

The main content area is divided into several sections:

- Money Play / Practice Play:** Includes game type buttons for Hold'em, Omaha Hi, Omaha Hi/Lo, 7 Stud, and 7 Stud Hi/Lo.
- Quick Seat:** Includes buttons for Ring Games, Sit & Go, Multi-table, and Jackpots.
- Game Selection (1, 2, 3):**
 - 1 Game type:** Radio buttons for Cash Games (No Limit, Fixed Limit, Pot Limit) and Tournaments (Sit & Go).
 - 2 Tournament type:** Radio buttons for 10 players, 2 players, All-In, and Double Or Nothing.
 - 3 Buy:** A list of buy-in amounts: \$2.5+, \$5+, \$10+, \$20+, \$50+, and \$100+.
- My Account:** Shows Available Money (7,571), Money on Tables (0), and Total (7,571). A Cashier button is present.
- Table Information:** Shows details for a table named 'Benebrana' with 58 players and a buy-in of 72,627.
- My Tournaments:** A table listing various tournaments with columns for Name, Stakes, Limit, Pts, Speed(Sec), Avg. pot, HndH, Action, and Details.
- My Status:** Shows a BRONZE loyalty level.
- Table Information (Scated):** A list of players and their chip counts, including 'wwwwww' with \$99,999 and '0000000000' with \$2,980.
- Waiting Players: 2** with buttons for Join Table and Unjoin list.
- Game Promotions:** Buttons for PLAY BLACKJACK, PLAY CASINO, 888 footballpools, and 888 sport.

A promotional banner at the top reads "Shout 888 from the rooftops and get \$50!".



Keeping Bingo growing

- Continue improving product
- Increase entertainment value
- Increase UK market share
- Launch across Europe
- Focus on B2B growth

X -

The Picture Room

Photos
Videos

Most Viewed Top Rated Just Added

Choose a gallery

ADD GALLERY

X -

The Picture Room

Photos
Videos

Most Viewed Top Rated Just Added

Gallery Title | Posted by Person's Name on Friday - 2 hrs ago
Tags: party, friends, event

Picture title
Tags: party, friends, event
★★★★★
[Rate](#)

Comments (4)

Lorem ipsum dolor sit amet conse ctetur dit men.
Posted by Person's Name

Lorem ipsum dolor sit amet conse ctetur dit. Lorem ipsum dolor sit amet conse ctetur dt.
Posted by Person's Name

ADD COMMENT **POST PICTURES**

X

Related Galleries (5)

Bingo in additional countries

El Cartonazo.com

Usuario: Corona Saldo: €0 Jugando En: El Cafelito

CAJERO VOLVER AL SALÓN

OPCIONES

PRÓXIMO JUEGO: 1 min 23 seg

PRECIO POR CARTÓN: 10c

MOstrar Más

AUTOSELECCIONAR TIRAS

1 2 3 4

CARTONES SELECCIONADOS

COMPRAR CARTONES ELEGIDOS

Mínimo 1 cartón Máximo 24 cartones

TIENES 0 CARTONES PARA ESTE JUEGO

BOTE €0

JUGADORES 0

cartones 1 a 12 de 24

Seleccionar tira

1	15		45	68	74
		22	41	54	78
4	19	36	49	64	
7	18	26	32		73
	20	24	39		62
9		28	37		66
10			50	57	63
	11	23		53	67
	12	21	31	58	
6			33	43	56
	35	55		75	90
8		27	46		79
3	29			60	70
5	13	25	38	44	
2	14		48	59	
	17	30	40		77
			42	51	69
	16	34	47	52	61

Haz Click Para Seleccionar 10c

Seleccionar tira

2	19	39	46	66	
3		23	32		61
5	20	29		47	79
1			49	58	78
		24	38	43	56
4					57
8	15	26			68
10	18	28	37	45	
6			41	54	67
11	25	35		64	86
	13	27	31		55
7			34	59	80
12		42	53	62	75
		33	48	52	74
	17	21	36	51	77
	14		50		65
9	16	22		60	69
		30	40	44	
				63	73

Haz Click Para Seleccionar 10c

SALA DE CHAT: Salón de ocio

1 Chateando

Bienvenid@ al Chat del Bingo!
Estás en el salón de entrada al chat. Puedes seleccionar la sala en la cual quieres chatear en el menú desplegable arriba de la ventana de chat. Por favor pregunta a los CM si necesitas ayuda o ve a la sala de Ayuda. Buena suerte!

ME RORAS YR ABIAJ JAJA OH XPB 2PB 3PB

Becoming a player in Sport

- Improve product
- Focus on specific markets
- Excel in cross sell
- Leverage CRM



Betting in Running Flash Application

you are at: bluesquare > sport > betting in running

LIVE NOW

FOOTBALL

Aston Villa	Manchester Utd
2	3
2nd Half	83:23

Juventus	Monaco
2	0
1st Half	13:58

Racing Santanc	Valencia
0	3
1st Half	32:42

HANDBALL

TENNIS

R.Kahlachreiber	R.Federer
30	0
1st Set	0:3

UPCOMING

FOOTBALL

Aston Villa	Manchester Utd
Start Time	17:00

HANDBALL

TENNIS

SUPER BOWL XLIII

ARIZONA	27
PITTSBURGH	23

1ST QUARTER 15:36

12:12 Field Goal Arizona

BETTING MARKETS

LIVE DIARY

WIN DRAW WIN

Juventus	20 / 1	Draw	9 / 2	Monaco	1 / 8
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TEAM TO SCORE THE FOURTH GOAL

Juventus	20 / 1	No goals	9 / 2	Monaco	1 / 8
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TEAM TO SCORE THE LAST GOAL

Juventus	20 / 1	Monaco	1 / 8
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TIME OF NEXT GOAL

Up to the 76th min	20 / 1	After the 70th minute	9 / 2	No fourth goal	1 / 0
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ADDITIONAL MARKET

ADDITIONAL MARKET

ADDITIONAL MARKET

ADDITIONAL MARKET

ADDITIONAL MARKET

ADDITIONAL MARKET

—Enjoy the game—

Are softer Games a new promise?

- Offer a lighter, softer and easier alternative
- Launched recently
- Optimize for recession times
- Learn the new CPA-LTV world
- Cross sell

Games Tab



We have a strong position

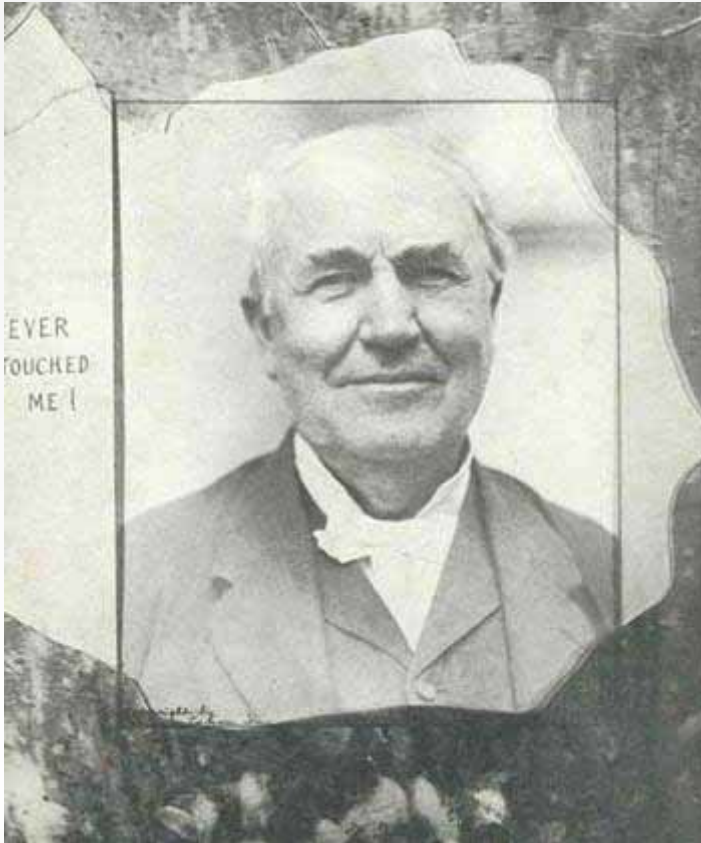
- The B2C-B2B combination
- UK leadership position
- No poker dependency
- Strong bingo business
- Expertise in marketing
- Good track record in taking advantage of change



The opportunity



It's tiring to be told: 'risk is also an opportunity'...



“Opportunity is missed by most people because it is dressed in overalls and looks like work.”

Thomas Edison

Many new opportunities

- Address customers' needs in recession better than others
- Find new innovative products customers want more
- Find new geographies where competition is minimal
- Win licenses giving us exclusive positions in key markets
- Become one of the leading B2B providers
- Acquire promising companies cheap
- And a lot more...
- Do what we did in 2007!



And limitations are mostly in our minds

“The worldwide demand for automobiles will not exceed one million”

Gottlieb Daimler



“...if only due to the lack of chauffeurs.”

What will you see us doing

- Thinking 'recession' and 'value'
- Focusing on what's important
- Being more efficient
- ...but NOT sacrificing the future for short term profit
- Looking for opportunities
- Not forgetting responsible gaming



Regulation



Regulation

▪ EU

- EU Commission's historic view – freedom of establishment and concept of mutual recognition
- Supported by the ECJ – Placanica/Gambelli cases
- Infringement proceedings against Italy, Denmark, Finland, Germany, France, Austria, Greece
- Various Member states look to liberalise – Italy, France, Spain, Sweden, Greece, Denmark
- March 2009 - EU Parliament vote – Danish “*Integrity of online gaming*” report – no legal force but cannot be ignored

Regulation (cont.)

▪ US

- Various initiatives on a federal level are yet to gain sufficient momentum
- Certain states including California look to regulate, nothing concrete yet
- No news about a DOJ settlement

▪ ROW

- Various countries look to liberalize online gaming including in Africa, LATAM and Asia



Summary



Summary

- Robust growth in 2008 despite unprecedented economic conditions since September
- Year of transformation into B2C and B2B business lines
 - key to growth in coming years
- Complete B2C offering – casino, poker, bingo, sport and backgammon
- Strong growth in B2B and emerging Offering
- Innovative, fast growing B2B – Racing Post deal announced today
- Confident of growth even in current economic downturn



Q&A



Thank you!

