

**Results for the year ended
31 December 2007**



8 April 2008

Agenda

Gigi Levy

- Highlights

Aviad Kobrine

- Financial Review

Gigi Levy

- Operating Review
- Regulation

**Gigi Levy &
Aviad Kobrine**

- Summary and Q&A

Highlights



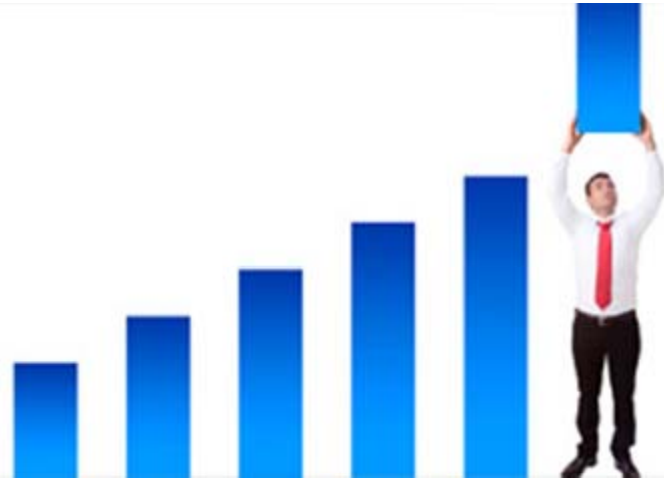
Highlights

- PBT* up **106%** to **\$46m** (2006: \$22m)
- EBITDA* up **177%** to **\$46m** (2006: \$16m)
- Total Operating Income up **38%** to **\$217m** (2006: \$157m)
- Net Gaming Revenue up **36%** to **\$213m** (2006: \$157m)
- Casino Net Gaming Revenue up **33%** to **\$118m** (2006: \$89m)
- Poker Net Gaming Revenue up **18%** to **\$81m** (2006: \$68m)
- Basic EPS* up **121%** to **12.6** cent (2006: 5.7 cent)
- Final dividend **5.0** cent, above stated dividend policy

* Continuing operations . Excluding share benefit charges and exchange gains.



Financial Review



Profit and loss account

\$m	2007	2006	% Change
Net Gaming Revenue	213.4	157.0	36%
Other operating income	3.6	-	-
Total Operating Income	216.9*	157.0	38%
Operating expenses	59.1	45.6	
Research and development expenses	23.5	19.4	
Selling and marketing expenses	70.9	51.0	
Administrative expenses**	17.9	24.6	
Total expenses	171.4	140.6	22%
EBITDA**	45.5	16.4	177%
Depreciation & Amortization	(5.8)	(3.8)	
Interest / FX	6.1	9.6	
Profit before tax cont. operations**	45.8	22.2	106%
Discontinued operation	(0.6)	64.2	
Profit before tax**	45.2	86.4	
Taxation	(3.2)	(3.1)	
Profit after tax**	42.0	83.3	
Basic earnings per share	12.4¢	24.8¢	

Final Dividend 5.0¢

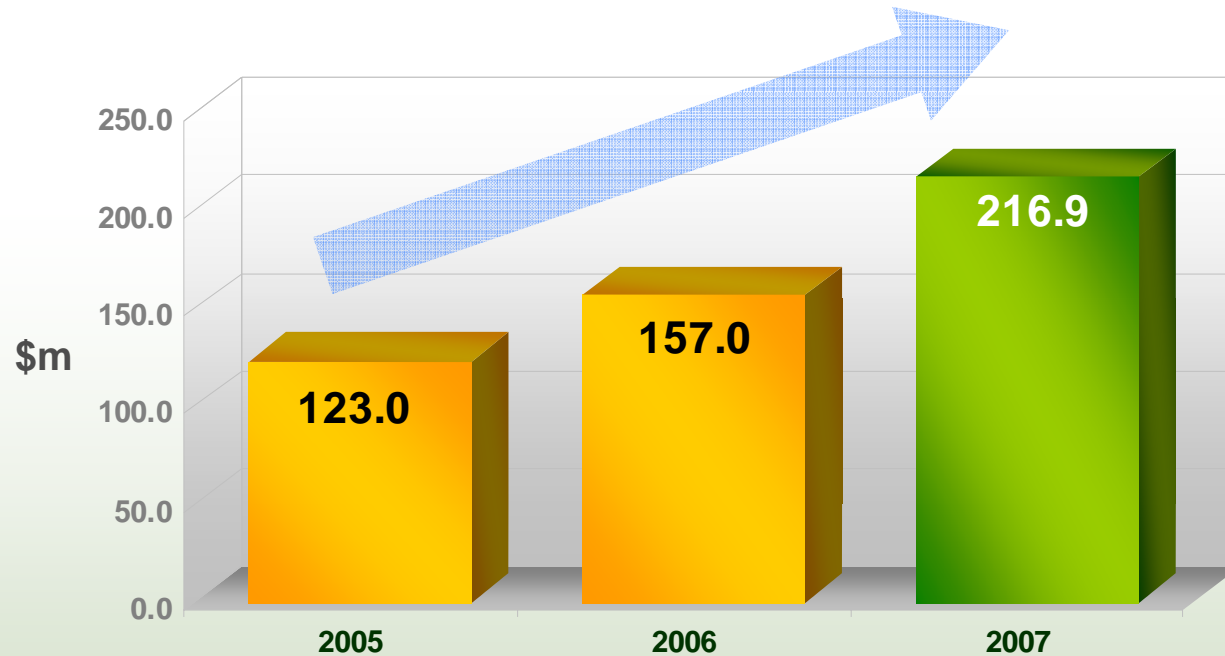


*Rounded ; **Excluding share benefit charges

Total Operating Income

- Strong 2007 - Total operating income growth - **\$216.9m** (2006: **\$157.0m**), an increase of **38%**

Total Operating Income 2005 – 2007



Net Gaming Revenue

- Strong 2007 - NGR growth - **\$213.4m** (2006: \$157.0m), an increase of **36%**
- Strong Q4 - 2007 NGR growth **\$62.8m**, an increase of **18%** above Q3 2007
- Q4 2007 NGR from emerging games (mainly Bingo) at **\$6.2m** an increase of **6%** above Q3 2007
- Quarterly CAGR of **9%** from Q1 2005 to Q4 2007

Quarterly NGR Q1 2005 – Q4 2007

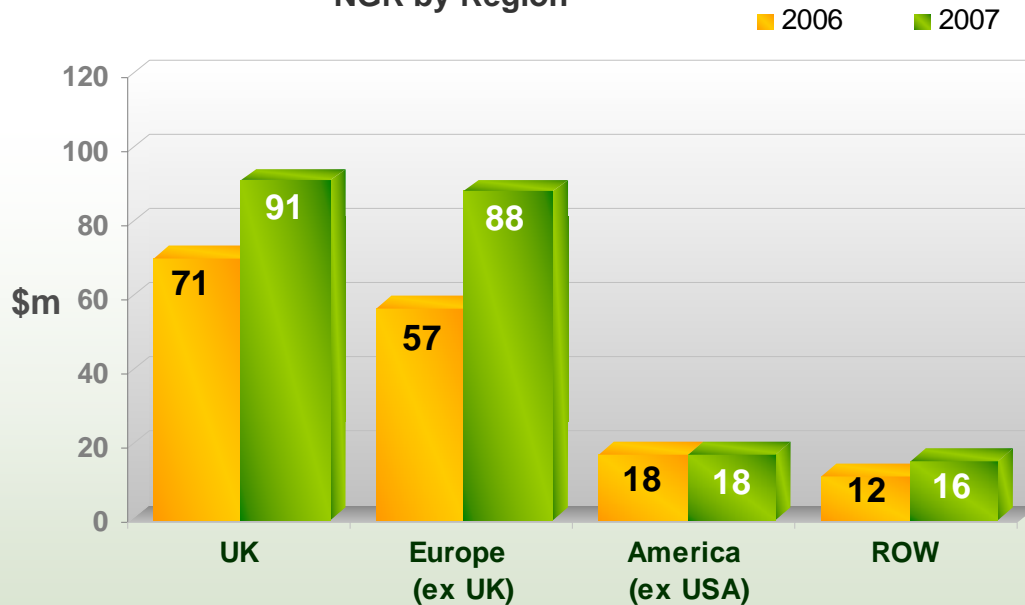


Geographic segmentation NGR

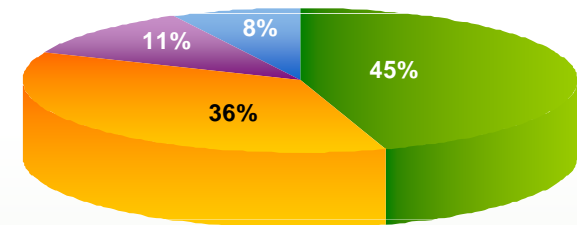
- UK remained largest market **43%** Europe (ex. UK) now **42%**
- Strong growth in Europe (ex. UK) up **55%**, UK up **30%** and ROW up **35%**

Geographic segmentation, NGR 2007 and 2006

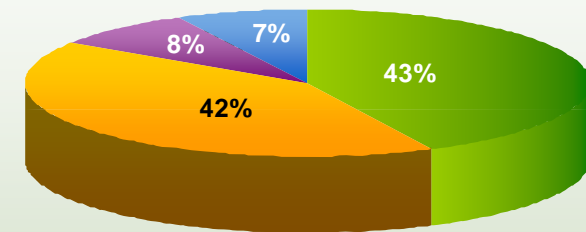
NGR by Region



NGR by Region 2006



NGR by Region 2007



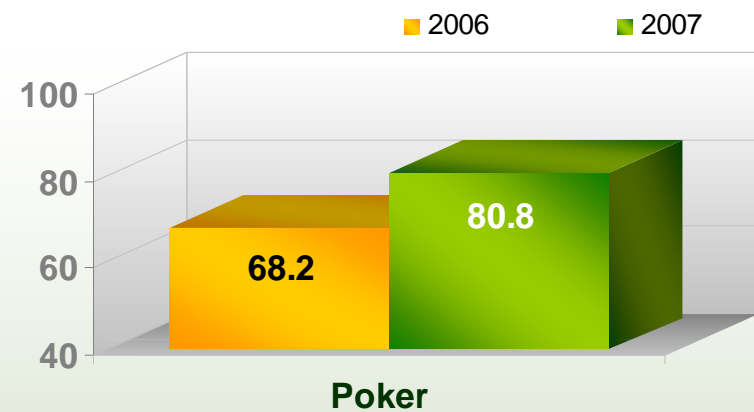
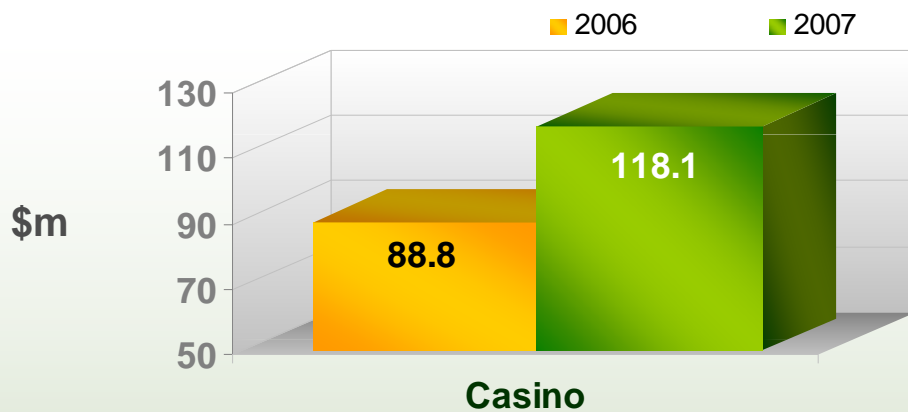
■ UK ■ Europe (ex UK) ■ America (ex USA) ■ ROW



Casino and Poker NGR

- Casino NGR up **33%** to **\$118.1m** (2006: \$88.8m)
- Continued Poker growth – up **18%** to **\$80.8m** (2006: \$68.2m)

Casino and Poker NGR 2006 and 2007

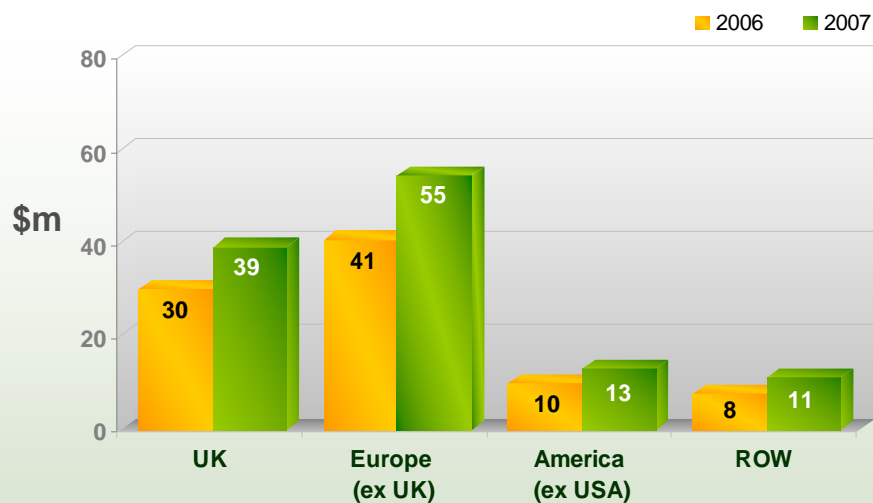


Casino and Poker NGR by Product and Region

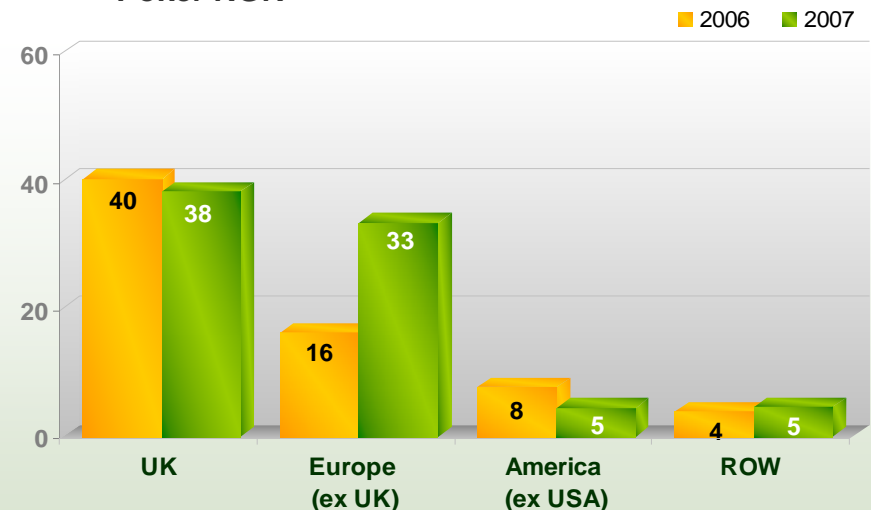
- Casino grew strongly in all regions :
 - Europe (ex. UK) **34%**, UK **29%**, Americas (ex US) **33%**, ROW **43%**, Total **33%**
- Poker growth driven by strong performance in Europe (ex UK) up **105%** :

Casino and Poker NGR by Product and Region 2006 and 2007

Casino NGR



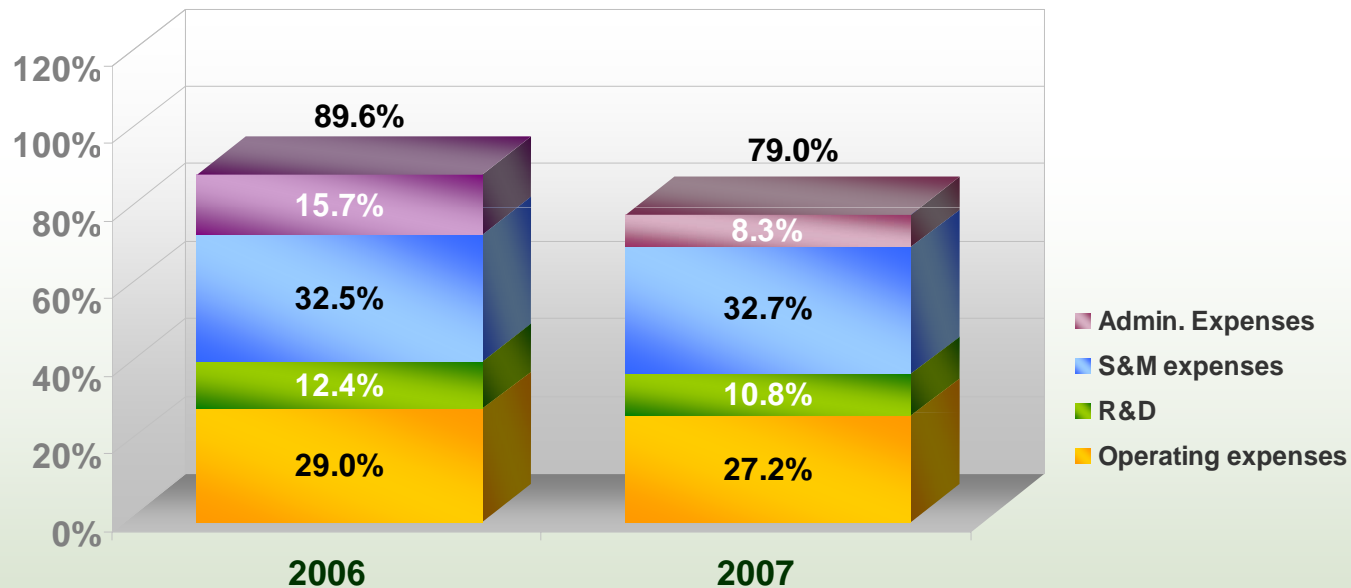
Poker NGR



Costs Structure

- Costs reduced to 79% from Total operating income (2006: 90%)
- Operating expenses reduced to **27.2%** of Total operating income (2006: 29.0%)
- Administrative expenses* reduced to **8.3%** of Total operating income (2006: 15.7%)
- R&D expenses reduced to **10.8%** (2006: 12.4%)

Costs as % of Total Operating Income 2006 and 2007

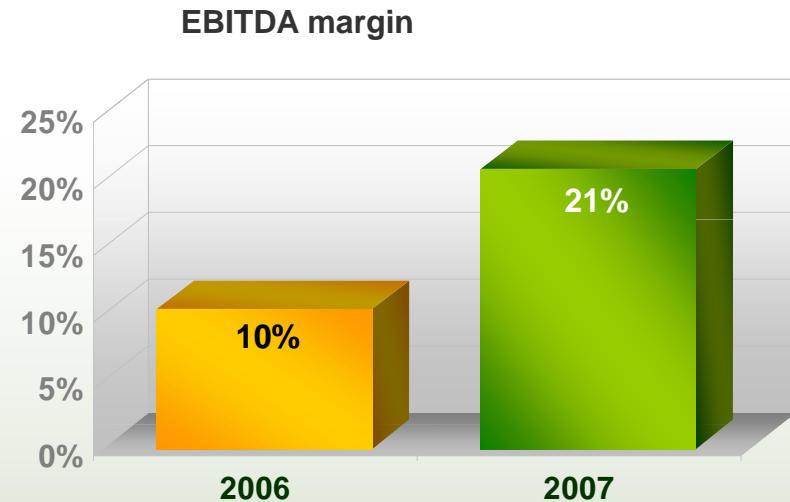
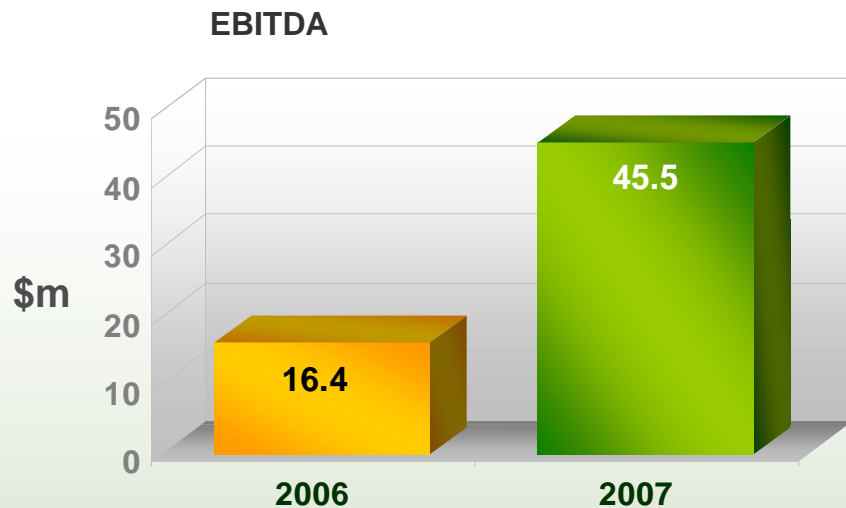


*Excluding share benefit charges

EBITDA and EBITDA margin

- EBITDA* up **177%** to **\$45.5m** (2006: \$16.4m)
- EBITDA *margin up to **21%** from Total operating income (2006: 10%)

EBITDA* 2006 and 2007

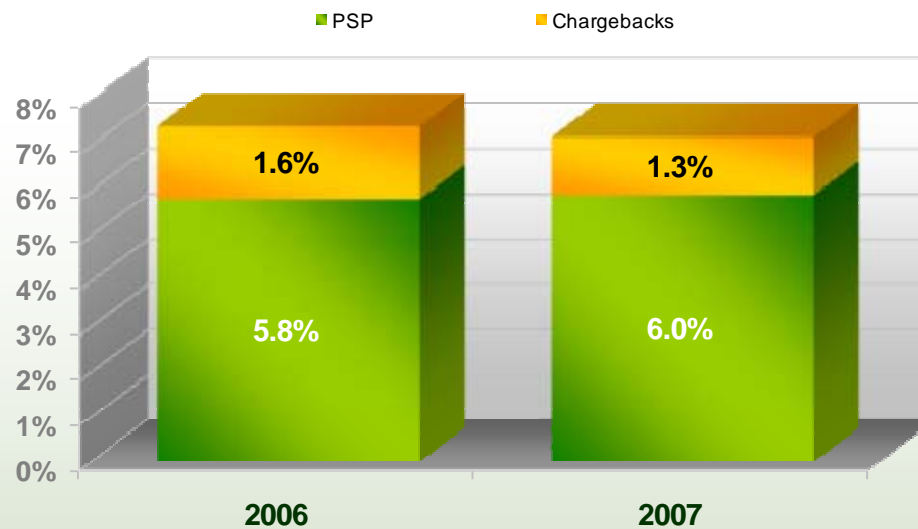


*Excluding share benefit charges

Chargebacks & PSP

- Chargebacks down to **1.3%** of Total Operating Income (2006: 1.6%)
- PSP commissions* **6.0%**, comparable to 2006 (5.8%)

PSP and Chargeback as % of Total operating income

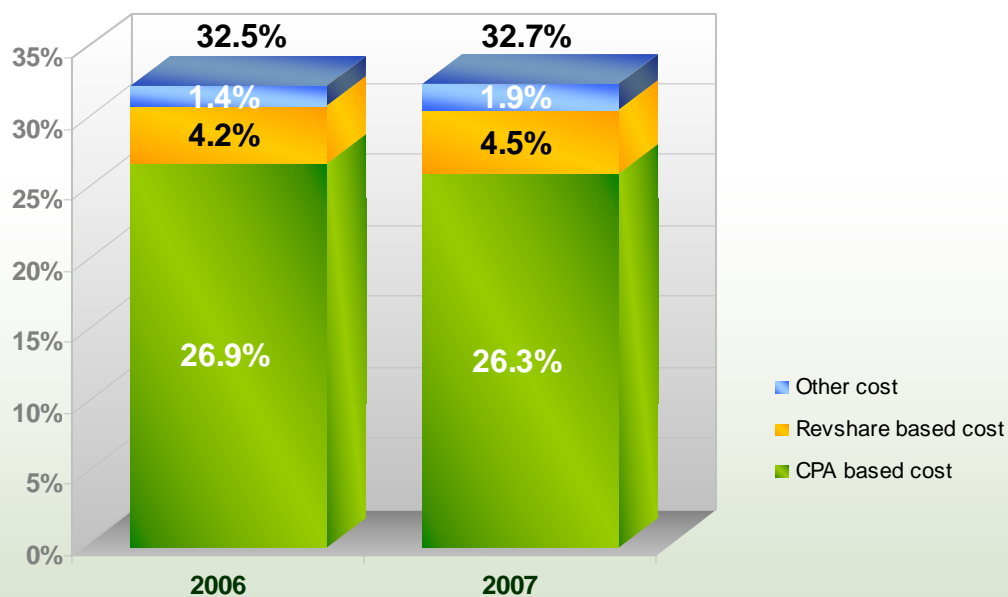


*Excluding Emerging offering

Marketing Costs

- Total Marketing costs at **\$70.9m** (2006: \$51.0m)
- Represented **32.7%** of Total Operating Income - same as 2006 (2006: 32.5%)

Marketing costs as % of Total operating income



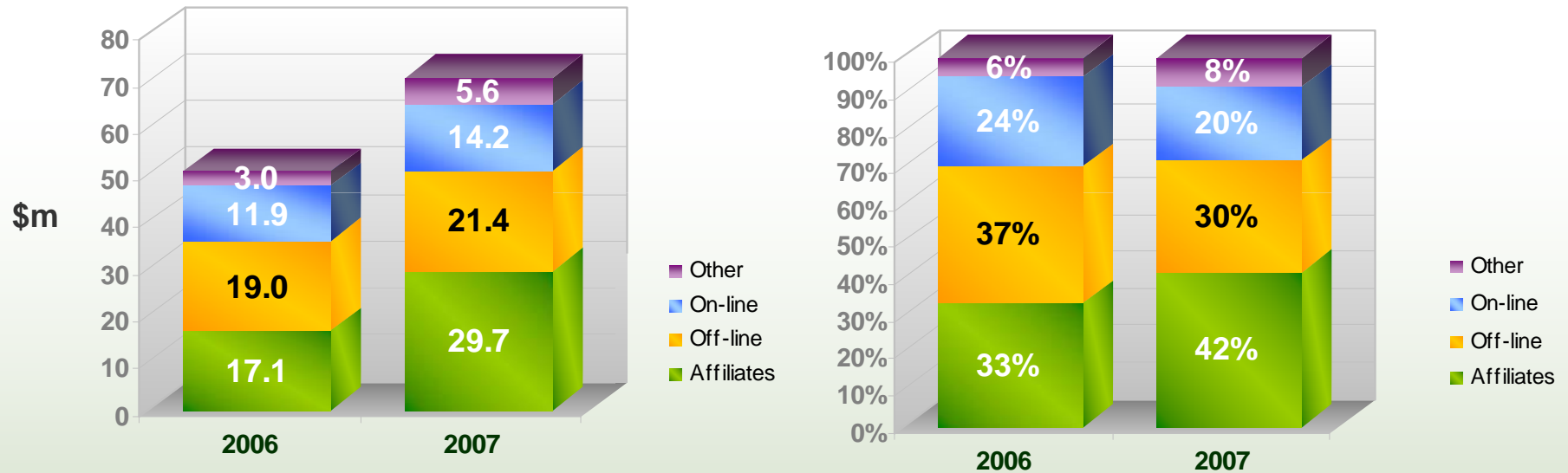
* Excluding Emerging offering.



Marketing Costs

- Expanded Affiliate program
- 2007 FTDs* **263k** (2006: 263k)
- 2007 CPA* **\$225** (2006: \$170) (excluding rev share FTDs and costs)

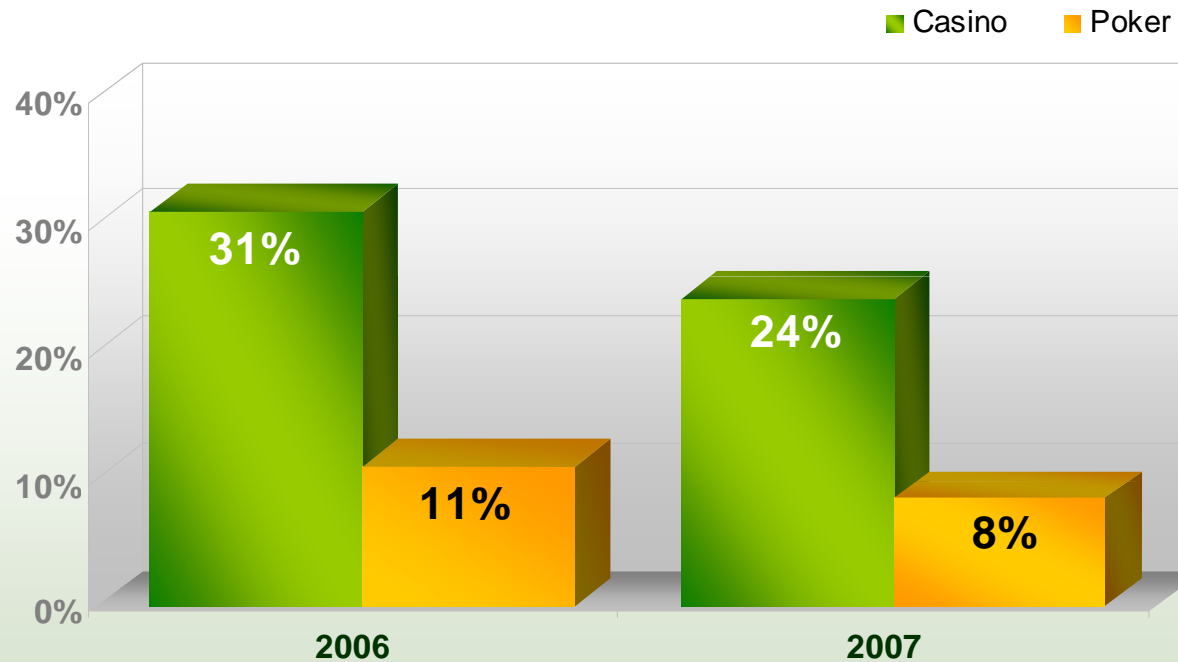
Marketing costs by channel as % of Total operating income



Customer Bonuses

- Increased bonus efficiency
- Poker bonuses reduced to **8%** in 2007 from **11%** in 2006
- Casino bonuses reduced to **24%** in 2007 from **31%** in 2006

Customer bonuses* as % of NGR

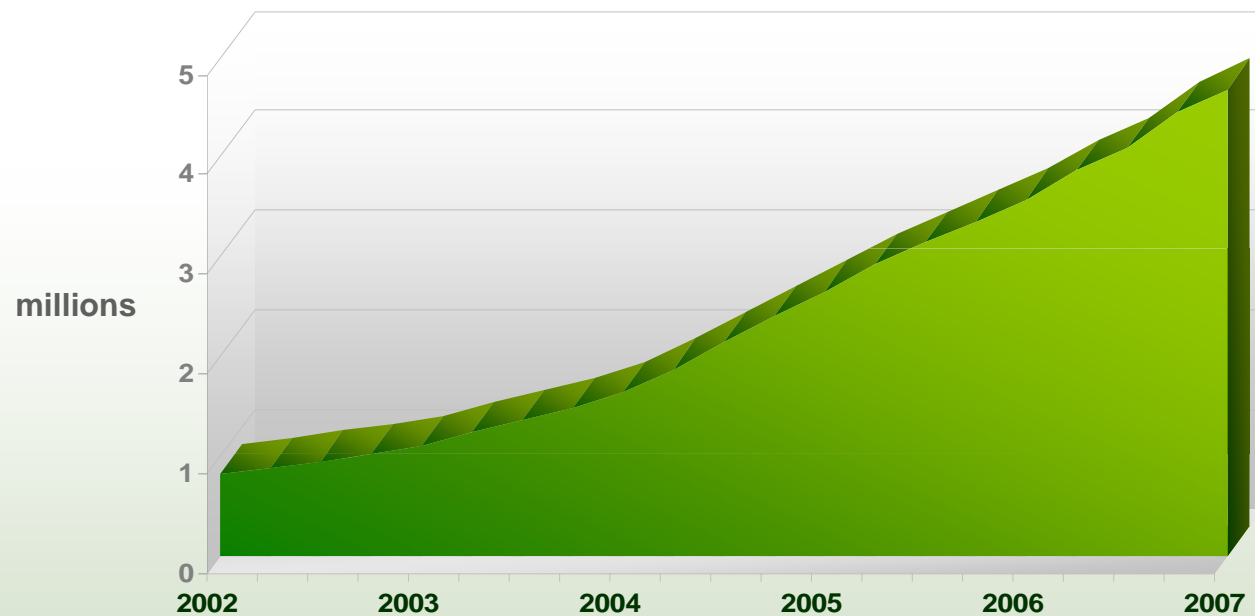


*Bonus excluding converted loyalty points

Strong Real Money Registrations Growth

- Registrations increased **31%** reaching **4.7** million at year end 2007
- Quarterly CAGR of **9.6%** between Q1 2002 to Q4 2007

Real Money Registrations Q1 2002- Q4 2007



Balance sheet as at 31 December 2007

\$m	2007	2006
Non-current assets		
Intangible assets	40.7	---
Property, plant and equipment	16.5	13.0
Financial assets	0.7	---
Deferred tax	0.5	0.6
	58.4	13.6
Current assets		
Cash and cash equivalents	104.3	114.4
Trade and other receivables	19.5	9.7
Total Assets	182.2	137.6*
Equity		
Share capital	3.1	3.1
Retained earnings	89.6	83.9
	92.7	87.0
Liabilities		
Current liabilities		
Trade and other payables	63.0	27.9
Members deposits	26.4	22.7
Total equity and liabilities	182.2*	137.6

Unleveraged balance sheet

* Rounded



Cash flow statement

\$m Year to 31 December	2007	2006
Cash flows from operating activities		
Profit before tax	37.4	77.6
Share benefit charges (non-cash)	7.8	8.8
Profit before tax and Share benefit charges	45.2	86.4
Depreciation and amortisation (non-cash)	5.7	3.8
Interest received	(5.4)	(4.9)
Change in current assets and liabilities	3.7	2.1
Cash generated from operating activities	49.2*	87.5*
Tax paid	(3.0)	(3.1)
Net cash generated from operating activities	46.2*	84.5*
Net cash used in Investing Activities	(20.0)	(3.6)
Net cash use in financing activities (Dividend paid)	(36.2)	(28.7)
Net (decrease) / increase in cash and cash equivalents	(10.0)	52.2
Cash and cash equivalents - beginning of year	114.4	62.2
Cash and cash equivalents - end of Year	104.3	114.4

* Rounded



Operational review



Agenda

- A reminder of our 2007 strategy
- Our achievements:
 - Our offering
 - Our marketing
 - Our B2B business
- Growth in 2008 and beyond
- A taste of 2008
- Responsible Gaming
- Industry accolades
- Regulatory developments
- Summary

**Our 2007 achievements –
our offering**



888 new Offering: Casino, Poker, Bingo, Sport

The screenshot shows the 888.com website homepage with a green header. The main navigation menu includes Home, Casino, Poker, Sport, Backgammon, and Bingo. A secondary menu lists Download, Getting Started, Deposit, Cashout, Help, Affiliates, Players' Club, Responsible Gaming, About Us, and 24/7 Support. The language is set to English.

enjoy bingo

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- Players' Club

Jackpots: **cring 000 \$5,301.36**

888sport **BET NOW** NEW!

- Multi Sports
- Live Betting
- Best Odds
- Quick Payouts

888ladies **PLAY bingo** NEW!

GET £10 FREE + 150% welcome bonus

- Playing is easy as 1,2,3
- See our exciting promotions

£686,886 Weekly Coverall Tournament

Call us toll-free 24/7

[Casino](#) [Net](#) [Panic Poker](#) [Bingo](#)

Sponsorships

Our passion is the game. 888.com is the proud five-year title sponsor of the prestigious World Snooker Championship!

Casino - New Games

2007 - 888 has developed an integration infrastructure to facilitate addition of new 3rd party games.

2008 – 888 will integrate the following game types -

- Video Slot Machines:
 - Advanced Bonus Rounds
 - Jackpots
- Fixed Odds Games:
 - Scratch cards
 - Virtual Sports
 - Hi/Low
- Branded Games
- Local Games:
 - Asia Pacific
 - Latin America
 - European Versions



Various New Poker Features

- Rake-based bonus (instead of wagering-based)
 - Flexible First Deposit Bonuses (= acquisition tool)
 - Attractive reload bonuses (= retention, NGR)
 - Real time indication (on the poker table) of the progress in clearing the bonus
 - Advanced bonus management system
- Unifying the demo and real accounts (= acquisition)



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—Enjoy the game—

Various New Poker Features (cont.)

- Additional languages
- New communication options with players
- WPC – largest online tournament
- Improving the tournaments capabilities
- Significant infrastructure improvements
- Better multi-tabling
- Unique features in the client



888ladies Bingo

- Built in 2007 and Introduced in the UK Market on February 1st
- Using In House Technology
 - Web-based, no download app
 - 6 bingo rooms
 - 75-ball, 90-ball games
 - Lively chat in game app with chat hosts
- Competitive promotions and bonuses



888Sport Offer

- Deal signed and product integrated in 2007, Launched March 5th 2008
- Available in UK, Spain, Germany, Sweden Austria and Denmark
- Trading provided by Blue Square
- Betting platform provided by Orbis
- Support Multi currency – USD, DKK, SKK, Euro and Sterling (deposit and bet)
- Covering football (national and international), horse racing, greyhounds, Formula 1, Basketball and more



New Payment Methods

- Pay & Play – 888 stored value card
 - Developed and managed internally
 - Used by 888 for local events, by its white labels (Tower Torneos, Rileys) and affiliates
- EntroPay - Virtual VISA card
 - March 2007: Offered through call center for immediate deposits by phone
 - August 2007 : Offered through the web



Localization @888

Accelerated localization process:



Year	Casino	Poker	Sport	Bingo
2005	11	1	0	0
2006	12	6	0	0
2007 (Till March 2008)	14	8	5	1



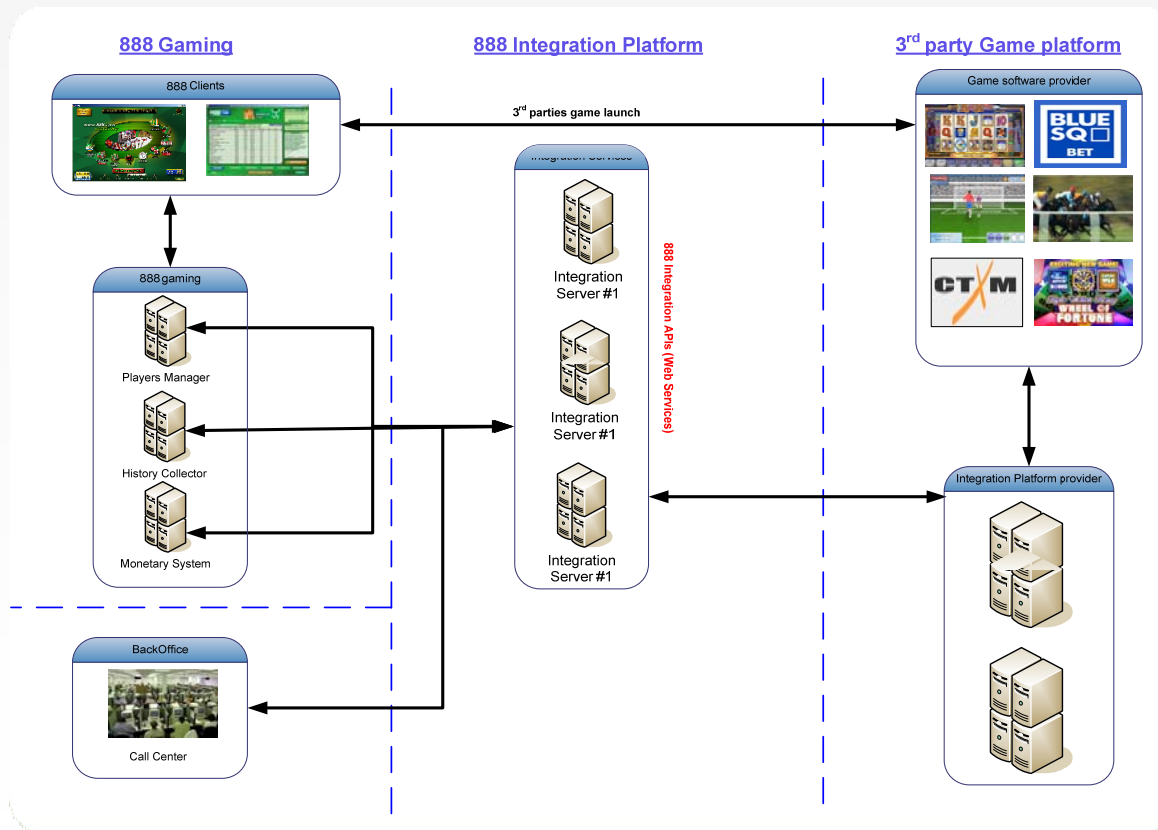
New translated applications and release of **updated** versions throughout 2007:

- 2 new languages for Casino (Danish and Greek)
- 2 new languages for Poker (Dutch and Portuguese)
- 8 new languages for Casino in Poker
- Upgraded languages for Casino and Poker
- Sport released in 5 languages in March 2008.



Integration Platform www.888debut.com

- Support addition of new 3rd party games.
- Easy to use single point of integration to 888 internal gaming and back office platforms.



- 2007- Integration of 888 and Blue Square
- 2008 - Integration of 3rd party new games by multiple vendors

Bingo business integration

- 7 networks license the software including:

- Foxybingo.com
- Mirrorbingo.com
- ThinkBingo.com
- Bingoscotland.com
- Thinkbingoplus.com
- WinkBingo.com
- Cashcade Bingo Network



- (include in excess of 25 white labels)
- Foxy bingo, Mirror Bingo and Think Bingo are amongst the most popular and well known bingo networks in the UK.
- Operates also 888's white label network with over 45 white labels generating in excess of \$11.5M deposits



Our 2007 achievements –
our marketing



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Taxis – In & Out

Magazine Ads



Playful Minds Everywhere – His & Hers

Playful Minds On-The-Go

Consistent message across regions

Sample regional activity - Pokertour 2007 Austria

- The Austrian „Pokertour 07“ took place in the 9 biggest cities of Austria
- 888.com was the main sponsor of the tour.
- Final event in the Concord Card Casino, Vienna, broadcasted for television.
- 1.500 players joined the federal state championship
- 5.000 players joined the Sit'n Go tables



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Sample regional activity – GIGA Pokernight daily show

- 888.com featured in the daily poker show called “Pokernight“.
- In the show, GIGA broadcasts live studio tournaments with 888.com branded tables.
- 20,000 daily viewers
- online stream 1,000 contacts each day
- Website: 1,000,000 page impressions



Sample regional activity - 888.com German National Team

- 50,000 players joined to become one of the 30 qualifiers for the final event,
- TV produced final event, to win two places in the German National Poker Team



Viral Marketing & User Generated Content



Eight Magazine

- The offline extension to 888's online experience
- Revenue-generating tool increasing readers' loyalty
- Significant positive effect on 888's brand perceptions
- Strong return on investment
- Currently available in the UK - will be rolled into additional countries in 2008



UK unaided Awareness – first mention:

888.com is the most top of mind online gaming and betting site!

What online gaming and betting web sites have you seen, read or heard about?

	Gamblers %	Difference from 2006 %	Potentials %	Difference from 2006 %	888.Com customers %	Difference from 2006 %
888.com	12	+1	13	-4	44	+4
Bet fair	7	-2	3	-6	3	-1
Gala	7	+7	1	+1	1	0
Ladbrokes	7	-3	4	-6	5	0
William hill	7	-3	4	-6	5	+2
Bingo (all other)	7	+5	6	+4	2	-1
Coral/coral eurobet/eurobet	5	+2	0	-3	1	0
Jackpot joy.com	3	+3	2	+2	1	-3
Paddy power	3	0	2	-1	1	-1
National lottery	2	0	1	-1	0	0
Bet fred	2	-1	3	0	1	0
365 / bet 365	2	-2	0	-4	1	0
Poker (all other references)	2	0	5	+3	2	0
Partypoker	2	+2	1	+1	6	+6
Base:	(417)	(460)	(201)	(189)	(472)	(248)

Our 2007 achievements –
our B2B business



Our strategic partnerships business

- RileysPoker
 - 2007 Land-links Partnership of the Year (egaming Awards)
 - Successful poker league in club ending in an online tournament
 - New integrated acquisition campaigns with Rileys marketing arm
- Tower Torneos
 - Deepening our foothold in the LATAM region
 - Constant growth in customer base
 - Active participation in 888's poker events while offering exciting poker tournaments in LATAM for the general population on 888's poker network
 - Continuous strong TV presence in the region



Our strategic partnerships business

- LuckyAce – strong successful launch
 - Currently already supporting three languages
 - Acquisition rate significantly surpassing the business plan
- Annual run rate already above \$10M





- Home ↓
- Club Finder ↓
- Competition ↓
- Poker League ↓
- Calendar Of Events ↓
- Snooker & Pool ↓
- How To Register ↓
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News

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Our growth in 2008
and beyond



Where will growth come from

- Ongoing growth in our core B2C business
- Quick growth in the B2B (strategic partnerships) business
- Strategic deals which will potentially change our business in some areas such as:
 - New licences in different countries
 - Forming local joint ventures in specific markets
- M&A
- Launching a new business

Our 2008 Strategy Focus

- Our proven strategy remains valid for 2008
- Accelerated product development based on 2007 infrastructure improvements
- Broadened innovative marketing in more geographies
- Further increase in cross-selling and up-selling
- Additional entertainment and community features



A taste of 2008



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Testimonials

"Thank you 888ladies for the incredible experience! This is by far the best bingo room..."

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888zhenren

- Zhenren is “Live” in Chinese
- 888zhenren is 888’s Asian brand
 - Asian sport betting
 - Live dealer casino
- Two local partners
 - Entertasia (Macau/Phillipines) – live dealer technology
 - E-sky (Malaysia) – Asian sport betting



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HOME

PRIZE DRAW

TRICK SHOT COMPETITION

BET NOW

24 HOUR SUPPORT

Enter the Prize Draw Competition and you could win...



1st



The opportunity to present the 888.com World Snooker Championship Trophy to the 2008 Champion. The prize includes a pair of VIP tickets to the final, hospitality, pictures with the newly crowned champion and trophy and an invite to the official after final party.

2nd



Two tickets to the semi-final and final of the 888.com World Snooker Championship 2009.

3rd



Signed cue from John Higgins, 888.com World Snooker Champion 2007.

ENTER COMPETITION ▶

888.com World Snooker Championship Draw Webcast



The complete draw for the 888.com World Snooker Championship 2008 ▶




888.com WORLD SNOOKER CHAMPIONSHIP

HIGGINS TO REPEAT CRUCIBLE TRIUMPH?
TOURNAMENT AND SPECIAL BETS AVAILABLE NOW

888SPORTS - YOUR ONLY CHOICE FOR WORLD SNOOKER

CLICK HERE ▶

Coming soon!

Enter the Trick Shot Competition and you could win...

A day's snooker coaching with Ronnie 'The Rocket' O'Sullivan and the chance to interview him for the website and 888.com's own 'Eight Magazine'.



Tip 1

Involve the audience - whether it's a magic trick or snooker trick shot, involving the audience adds another dimension to the performance.

▶ More trick shot tips...

Apply for tickets to the 888.com World Snooker Championship ▶





**WORLD
POKER
CROWN**
ANYONE CAN TAKE IT

**\$3 MILLION
GUARANTEED**

**PLAY POKER
NOW**

[Home](#) [WPC Schedule](#) [Final event](#) [This week's special](#) [How to play](#) [FAQ](#) [T & C's](#)

\$3 million prize pool guaranteed

Take the crown and the throne of worldwide poker dominance!

The World Poker Crown (WPC) is 888.com's biggest ever poker tournament with guaranteed prizes of \$3 million and a guaranteed first prize of \$1 million!

Anyone can take the WPC championship so this is your chance to go down in poker history as the king (or queen) of poker. Play against players from around the world in satellite tournaments starting at just \$1!

Be one of the 8 players at the final table and play live on TV for the WPC title and \$1 million prize. The WPC Final Event will take place at Perlada Castle in Barcelona, Spain from May 6 to May 10.

**Click &
Register**

Responsible Gaming



Responsible Gaming



- Led by a dedicated full-time executive
- Huge progress in the field:
 - Gamcare certificate
 - Better training of our employees
 - Closer ties to organizations dealing with problem gaming
- Next generation automated systems we will use to detect problem gaming in development stages

Regulatory developments



Regulatory updates

- USA – no change
- EU:
 - Placanica
 - Infringement letters
 - Move toward licensing
- Other:
 - Most jurisdictions evolving toward a properly regulated environment
 - Some jurisdictions remain vague



Summary



Summary

- Very strong year
- Great infrastructure for growth in 2008 and beyond
- Closed most product gaps
- Positive regulatory development
- Major achievements in responsible gaming
- Overall a great year
- Confident of further growth in 2008



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—Enjoy the game—

Thank you!



888.com
—Enjoy the game—

Appendix I

Industry accolades



Industry Awards 2007

- **Best Betting and Gaming Company Leisure Report Awards 2007**

Named "Best Betting and Gaming Company" at the Leisure Report Awards 2007 in London. The Leisure Report Awards are given to companies whose vision, originality and overall performance demonstrate excellence and enrich the industry as a whole.

- **Gold Readers Choice Award for TOP CASINO The Gambling Online Magazine Awards 2007**

- “888.com proved its enduring appeal at the prestigious GOM Awards in 2007, snatching the Gold Reader's Choice Award for Top Casino. In the online gaming world”.



Industry Awards 2007

- **Casino of the Year Egaming Awards 2007**
- 888.com scored a hat-trick at the 2007 eGaming awards, beating off stiff competition and winning Best Online Casino for the third year in a row, thanks to "technical excellence and reaching for the highest levels of performance."
- **Best land - links Partnership**
Egaming Awards 2007
- "888's partnership with Rileys ... enabled 888 to reach out in a meaningful way to its target market and strengthened its brand across the UK's largest chain of snooker clubs."



Appendix II Quarterly KPIs



Casino and Poker KPIs

- NGR for Q4 2007 is **\$56.7m**
- **40%** increase from Q4 2006 and **19%** increase from Q3 2007

Casino and Poker Quarterly NGR Q1 2005 – Q4 2007



Casino and Poker KPIs

- Casino and Poker active customers in Q4 2007 at **209,918**
- **11%** increase from Q4 2006, the same as Q3 2007

Casino and Poker active customers Q1 2005 – Q4 2007



Casino and Poker KPIs

- Q4 2007 NGR per active customer is **\$270**
- **26%** increase from Q4 2006 and **19%** increase from Q3 2007

Casino & Poker NGR per active customer Q1 2005 – Q4 2007



Casino KPIs

- Casino NGR for Q4 2007 is **\$35.3m**
- **60%** increase from Q4 2006 and **22%** increase from Q3 2007

Casino Quarterly NGR Q1 2005 – Q4 2007



Casino KPIs

- Casino active customers for Q4 2007 at **73,737**
- **79%** increase from Q4 2006 as a result of revised KPI, **1%** increase from Q3 2007

Casino active customers Q1 2005 – Q4 2007



Casino KPIs

- Q4 2007 NGR per active customer is **\$478**
- **20%** up from Q3 2007, **11%** decrease from Q4 2006 as a result of revised KPI

Quarterly NGR per active customer Q1 2005 – Q4 2007



Poker KPIs

- Poker NGR for Q4 2007 is **\$21.4m**
- **17%** increase from Q4 2006 and **15%** increase from Q3 2007

Poker Quarterly NGR Q1 2005 – Q4 2007



Poker KPIs

- Poker active customers for Q4 2007 at **170,401**
- **15%** increase from Q4 2006 and **1%** increase from Q3 2007

Poker active customers Q1 2005 – Q2 2007



Poker KPIs

- Poker Q4 2007 NGR per active customer is **\$126**
- **1%** increase from Q4 2006 and **14%** increase from Q3 2007

Quarterly NGR per active customer Q1 2005 – Q4 2007

