NEW REPORT

EGAMING MONITOR

IN PARTNERSHIP WITH

iGB EXECUTIVE

CASINO REVIEW

OVERVIEW OF 2023

CASINO REVIEW 2023

Double-digit growth in the number of studios last year, plenty more games than the year before, more games per operator and a higher output per studio. More of most things again, then, but what does it all mean and who are the winners?

1.0 GENERAL OVERVIEW OF 2023

In 2023, egamingmonitor.com scanned more than 26,000 game-page URLs from 3,400 online casinos, identifying over 40,000 games from 744 unique studios (belonging to 577 supplier groups). How does this compare to 2022 and what are the implications for operators, platforms and studios alike?

UNIQUE URLS FOUND **26,273**	UNIQUE SITES FOUND **2,450**
TOTAL GAME POSITIONS **226,983,394**	
UNIQUE GAMES **40,642**	UNIQUE STUDIOS **744**

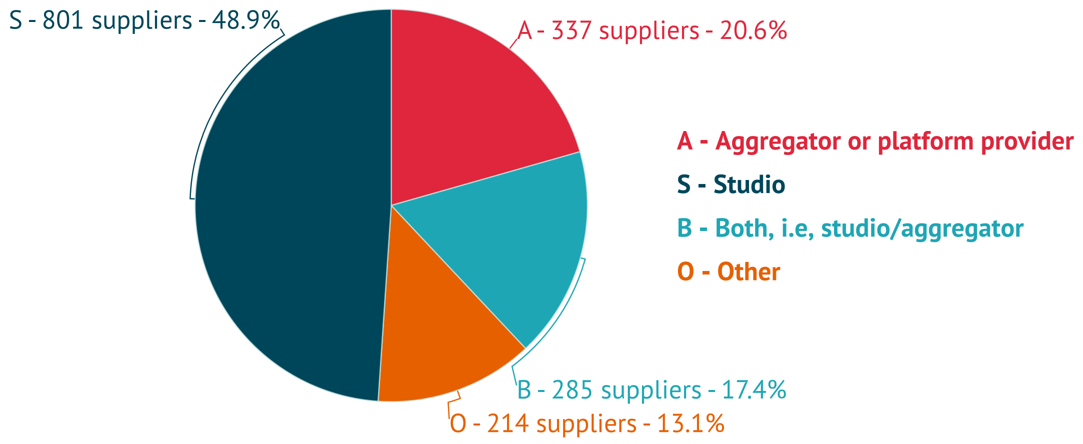
2.0 SUPPLIER AND STUDIO OVERVIEW

18% more suppliers than last year

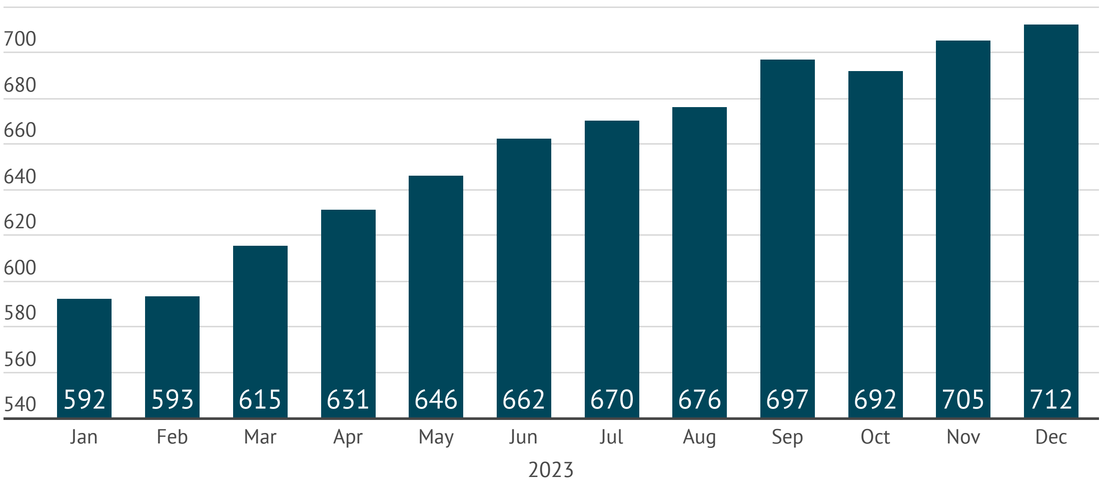
With 232 more suppliers than 2022, the supply side of our industry grew by an incredible 18% over the past year (for comparison, growth from 2021 to 2022 was just 8%). There are now 1,637 suppliers in the gaming world, categorised at top level into: studios, aggregators, studio/aggregators and others.

The relative percentage by type has remained fairly constant and so 129 new studios, for example, were launched last year – or nearly 165 if you include the hybrid studio/aggregators. A further 52 new aggregators or platform providers entered the market too, including platforms that were spun out as B2B businesses from existing operators.

Casino suppliers by type 2023



Number of studios found by month 2023



In total we found games from 744 unique studios over the 12 months (this is slightly more than the Dec 23 figure above as some studios may have closed or amalgamated during the period and some smaller studios may have content that appears sporadically).

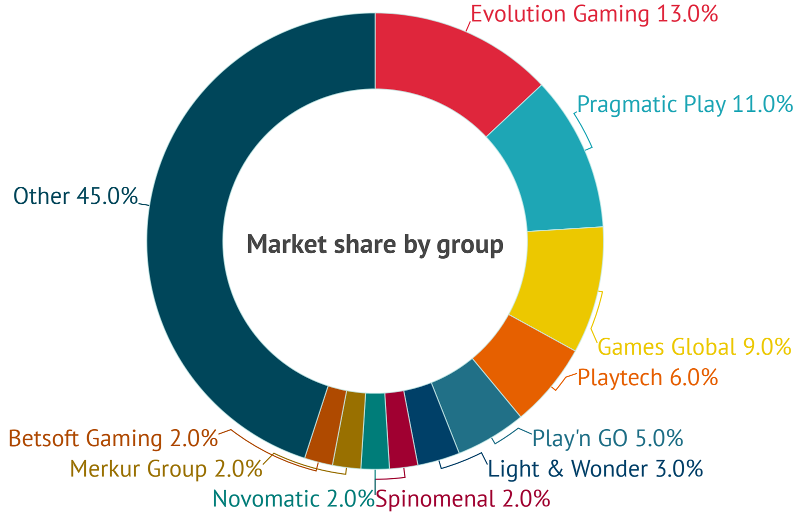
Top 10 studio groups have 55% of all game tiles globally

The influx of so many more new studios is having an impact on the share of the big providers, with their portion of total game tiles 1% lower than last year at 55% of total content. This is a measure of game distribution across all pages of all operator sites in 2023. Evolution Gaming tops the list with all its subsidiaries contributing to 13% of all game space across casino sites globally, although its share overall is slightly down when compared to 2022.

Big winners in terms of extending their content reach in 2023 were Pragmatic Play, Play'n GO, Spinomenal and Novomatic. Those whose share declined were Evolution Gaming, Playtech, Gauselmann/Merkur and Light & Wonder. Playson and Inspired Entertainment were bumped out of the top 10 by Spinomenal and Novomatic (see chart overleaf).

744
NUMBER OF DIFFERENT STUDIOS ACROSS OPERATOR SITES IN 2023

Percentage of game positions by studio group 2023



If you were to rank studio groups instead by the unique number of casino sites each studio has access to (see chart below), then the rankings would be similar except that Bragg Gaming, IGT and 1X2 Network would replace Betsoft, Spinomenal and Merkur in the top 10. The difference is down to the penetration across sites: some studios may have access to more sites but others have more games per site and/or more games across multiple subpages on sites. Evolution Gaming tops the board here too, with gaming content from the group found across 2,858 casino sites out of 3,450, or 83% of all casino sites globally.

Top 10 studio groups by unique number of operator clients

1	**Evolution Gaming**
2	**Pragmatic Play**
3	**Games Global**
4	**Playtech**
5	**Light & Wonder**
6	**Play'n GO**
7	**IGT**
8	**1X2 Network**
9	**Bragg Gaming Group**
10	**Novomatic**

Consolidation of content supply is starting to decline

In previous years the share of content of the larger supplier groups continued to rise *despite* the influx of so many new studios. In 2023 the 18% increase in new studios is now affecting this. Game content supplied by larger groups now accounts for 68% of all content on casino sites, down from 70% last year.

Note that games from 'large groups' here are defined as those produced by studios that either have subsidiaries or parent companies.

1,637

NUMBER OF SUPPLIERS IN THE EGAMINGMONITOR DATABASE AS OF 12/2023

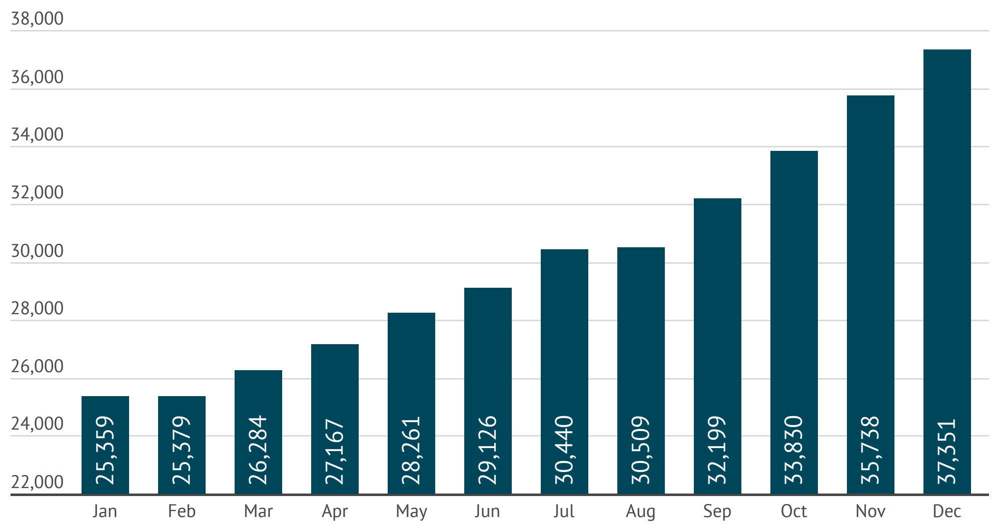
3.0 GAMES OVERVIEW

Nearly 50% more games across casino sites compared to 2022

We identify more than 37,000 unique games each month across operator sites, which is up a massive 48% on 2022 (the year prior, it was up 'just' 33%). The sheer number of games found across operator sites has increased further – and for similar reasons again:

- operators do not tend to retire games
- operators add more content studios each year either directly or via aggregators
- aggregators add more studios to their portfolios each year
- there are another 165 new studios this year producing content

Unique games found each month



165

NUMBER OF NEW STUDIOS PRODUCING CONTENT AS OF 12/2023

10,694 games were launched in 2023

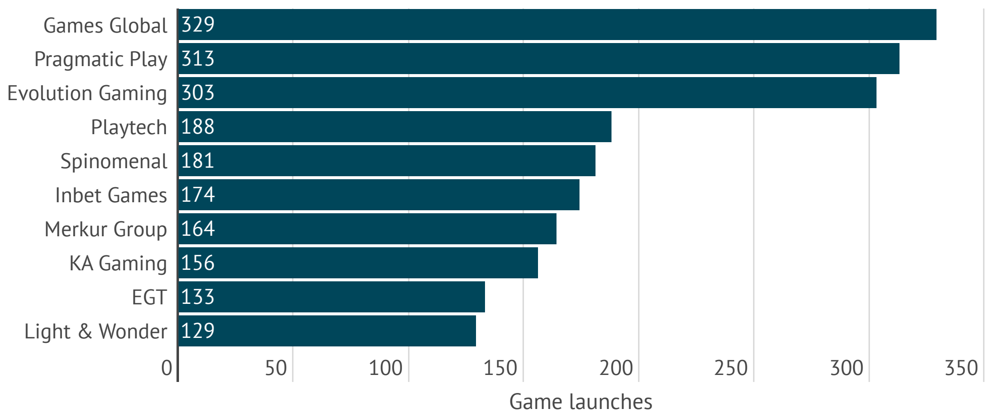
Egamingmonitor adds nearly 900 new games to the database each month or around 650 if scratchcards and instants are excluded. The average studio launches more than one game per month (this includes studios that are dormant but still have games live in the market). If only producing studios are included, the average is 2.36 games/studio per month. However, if instants and scratchcards are excluded these figures all reduce by around a third so the average producing studio would deliver around 1.75 games per month.

Game production statistics

	2023	2022	2021
Avg games launched per month	891	698	470
Total studios with live games	744	621	512
Total producing studios	377	310	285
Avg games launched per studio per month	1.20	1.12	0.92
Avg games launched per active studio per month	2.36	2.25	1.65

Some studios are more prolific than others. Our table of top game producers by studio group (not studio brand as such) shows how some of the top groups are launching more than 300 games per year. Note that this includes all game types including table games, instants, live games and so forth. Games Global's family of studios tops the list in terms of output, closely followed by Pragmatic Play. EGT joins the top 10 producer list for the first time this year.

Top 10 game producers



48%

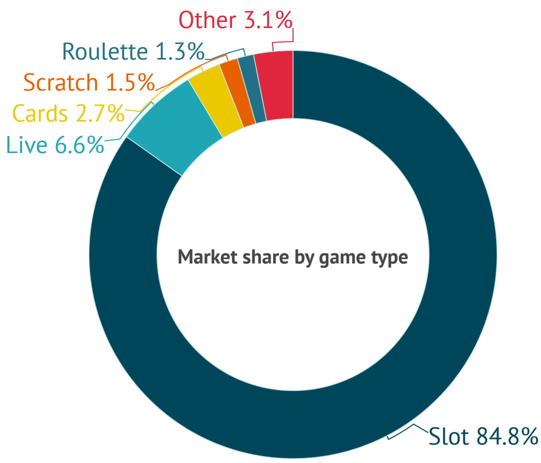
INCREASE IN NUMBER OF UNIQUE GAMES ON OPERATOR SITES OVER THE COURSE OF 2023

There are more than 90 studio groups building at least two games per month (25-plus per annum), while the 'median average' is around nine games per studio per year (up from seven last year). Of 'producing studios' the average is an output of 20 games per year.

Slots make up nearly 85% of all game content on operator pages

Across the 3,500 operator sites that we monitor, slots account for 84.7% of all game content across casino pages, down from 87.5% in 2022. Live games are in second spot and have increased their share to 6.6% of all game content on page.

Newer game types such as slingo and crash games are making inroads yet are still dwarfed in numbers (crash games are up from 0.1% to 0.3% of total games, for example). Some of the more innovative games, while taking up a very small percentage of total 'shelf space', are quite well distributed in terms of the numbers of sites they are featured on. They also tend to be more prominent in the better page positions, i.e. nearer the top or in the new, featured or popular sections.



891

AVERAGE NUMBER OF GAMES RELEASED EACH MONTH OF 2023

Operators have games from nearly 60 studios on their site on average

On average, operators have added another nine studios' worth of content this past year and now offer content from 59 suppliers. Note, though, that the median is around 46.

If each studio were to produce about 1.2 games per month, then the average number of new games that an operator could choose to launch each month would be around 72, or two new games every day.

A handful of operators based in Curaçao offer more than 10,000 games to their users, while 22% of all operator sites offer games from more than 100 studios.

Operator x game/studio statistics

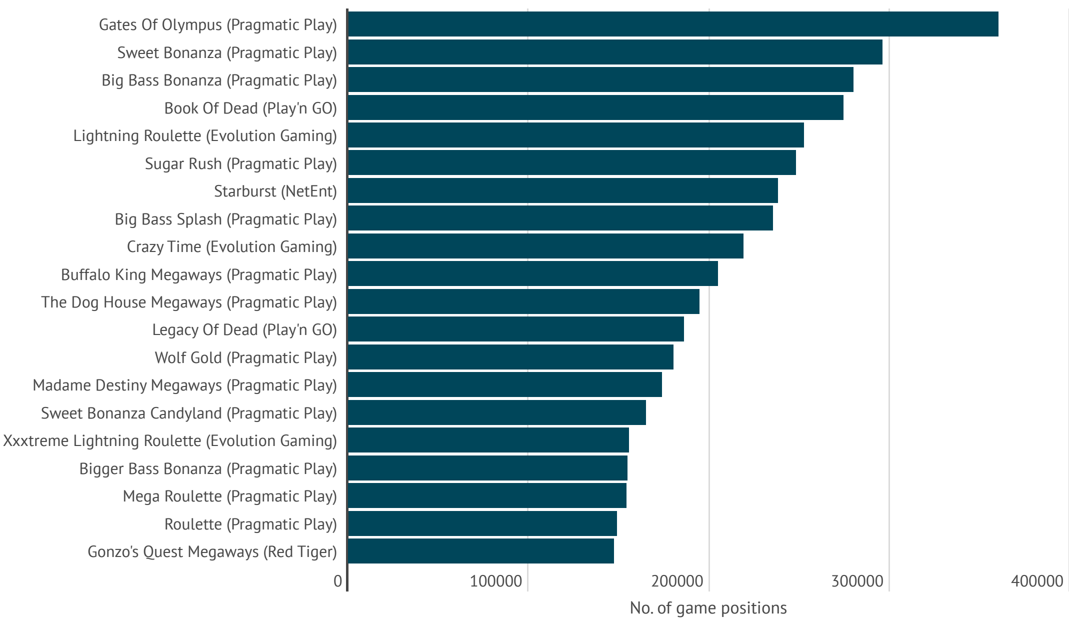
	2023	2022	2021
Avg games on an operator's site	929	650	545
Avg no. of studios on an operator's site	59	50	36
Most studios per site	348	257	
% of sites that have >100 studios	0.22	0.16	

Pragmatic Play is increasing its share of the top 10 games globally

Starburst from NetEnt no longer tops the charts and Pragmatic Play now occupies the top three spots in terms of distribution. Its Gates Of Olympus was found across 1,935 sites – 56% of the total number. The groups Evolution Gaming, Pragmatic Play and Play'n GO dominate the top 20 positions, with Pragmatic Play taking over half of the top spots. Note that the chart below also includes non-slots content, with live games Crazy Time and Lightning Roulette also making it into the top 20.

Top new games this past year were Big Bass Amazon Xtreme (Reel Kingdom), Fire And Roses Joker (Triple Edge Gaming), Big Bass Hold & Spinner (Pragmatic Play) and Gold Rush Express (Area Vegas Games).

Top games by number of game positions



90

NUMBER OF STUDIO GROUPS BUILDING AT LEAST TWO GAMES PER MONTH IN 2023

Branded games on the wane; sports and calendar event titles are up!

It's worth throwing out a few interesting stats relating to game features from 2023. Branded games make up a smaller percentage of all game content in 2023 compared to 2022, and Megaways titles are also down.

The top themes of 2023 were Action & Adventure, Tales & Legends and Animals & Nature. The themes that most increased their share of game distribution globally were sports, calendar events and fire.

Some of the most popular game words in 2023 were Cash, Big, Book, Hot and Clover.

Popular words 2023

Game feature statistics

	2023	2022
% Ways	2.76%	3.50%
% using licensed third party brands	1.75%	2.20%
RTP	95.39%	95.30%
Med vol %	35.04%	35.70%
High vol %	29.17%	28.40%
5 Reels %	79.86%	80.90%
Sports	1.19%	0.79%
Events	1.01%	0.68%
Fire	1.15%	0.80%
Brown	23.50%	22.66%
Silver	12.05%	11.80%

19

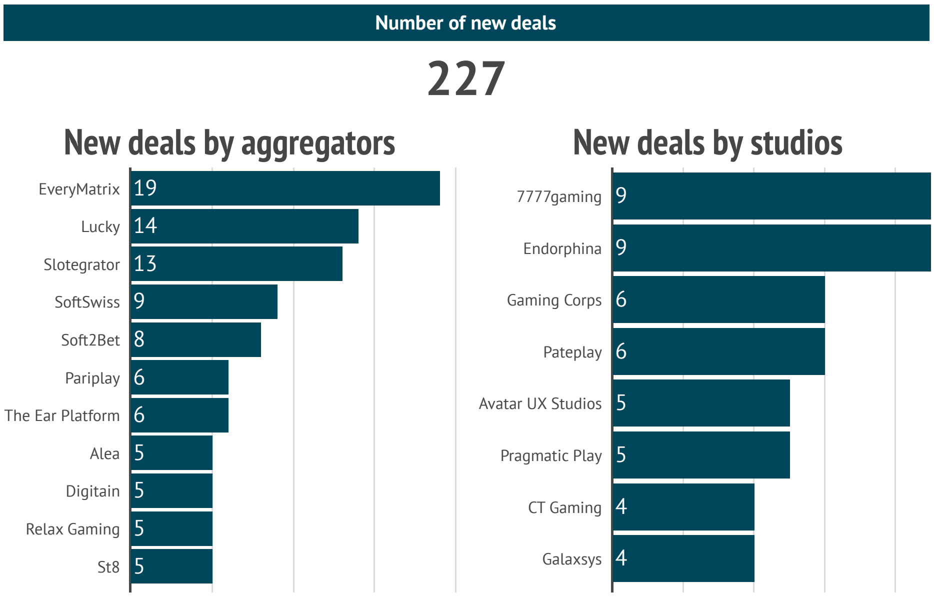
NUMBER OF NEW STUDIO DEALS STRUCK BY THE TOP AGGREGATOR, EVERYMATRIX

4.0 DEALMAKERS OVERVIEW

Top dealmakers 2023

EveryMatrix is not only the aggregator partnered with the most studios but it also continued on its path to remain the busiest aggregator of new content. It struck deals with 19 studios in the year, ahead of Lucky/Reevo and Slotegrator.

The busiest studios over the last 12 months from a deals perspective were 7777gaming and Endorphina, which managed to secure nine distribution deals via aggregators. Gaming Corps and Pateplay were runners up.



Originality is still on trend! Only 11% of games launched in 2023 had the same name

Historically 15% of all slot games have the same name as another. But there was an improvement in 2023 as just 11% of slot new games shared a name with an existing title. There's no surprise that five World Cups were launched (bringing the total now to 10) and five Year of the Rabbits, but another five Pirate's Treasure games bringing the total to nine is perhaps a bit lazy. Finally, there's no holding back that Gold Rush: five more were added, bringing the total now to 26.

Egamingmonitor.com covers 62,000 games, 1,600 suppliers and 3,500 operators. For access to our interactive charts and filters by country, by page type, by studio, by operator and more, please get in touch!

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