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NEW REPORT Q3 2024

CASINO REVIEW

Q3 2024

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More games per operator and higher output per studio: some trends are clearly enduring. Elsewhere romance is dead, pink is back and the bigger studio groups are flexing their muscles. This quarter's review explores how market shares, casino output and distribution have changed plus we examine some of the underlying casino game features behind these changes.

1.0 INTRODUCTION

The quarterly review is back, packed with information on the size and trends in the casino industry, such as which games, game features, studios or operators have performed best this last quarter.

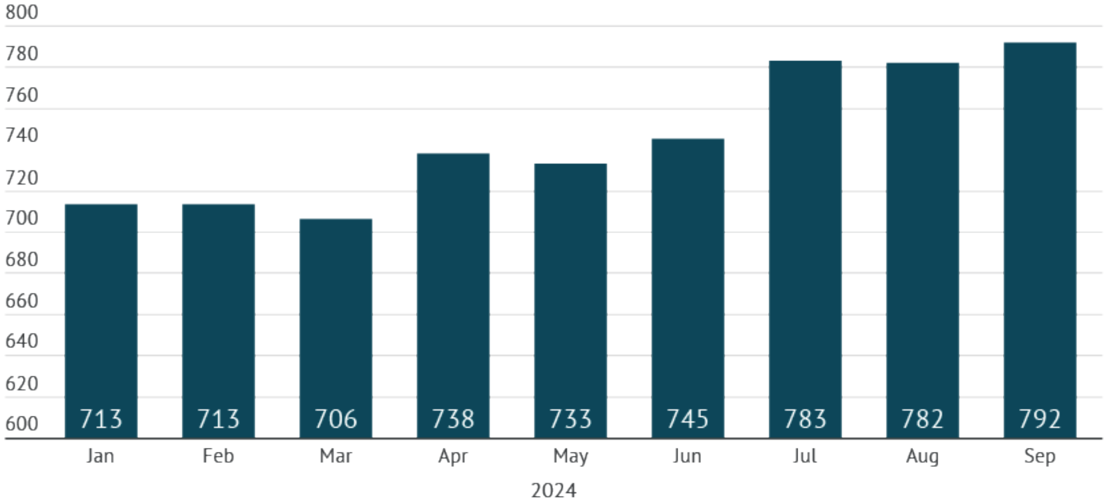
Unique URLs found 40,336	**Unique sites found** 3,561
Total game positions 317,296,825	
Unique games 46,625	**Unique studios** 803

2.0 GENERAL OVERVIEW OF Q3 2024

In Q3 2024, egamingmonitor.com scanned more than 40,000 game-page URLs from 3,500 online casinos, identifying 46,000 games from more than 800 unique studios. The following sections compare this data to previous quarters with implications for operators, platforms and studios.

It was another bumper year for content production and studio launches. This time last year, for example, there were just over 700 studios with live content across all operators globally (and 600 or so in 2022). On a monthly basis the following chart shows steady growth month in and out since the beginning of the year.

Unique studios found

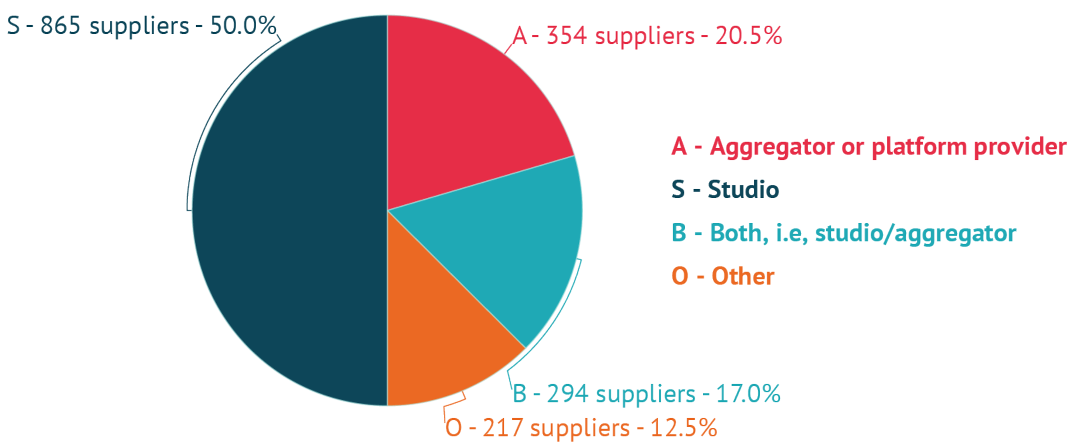


78 new studios have launched so far this year

Q3 was particularly fruitful in terms of new studio launches with 36 added to our supplier database just this past quarter (or 39 if we include the studio/aggregator combined category, i.e. those that straddle both roles). Seventy-eight studios have launched since the beginning of the year.

There are now 1,730 total suppliers of all types in our supplier database. Here's the breakdown:

Suppliers by type



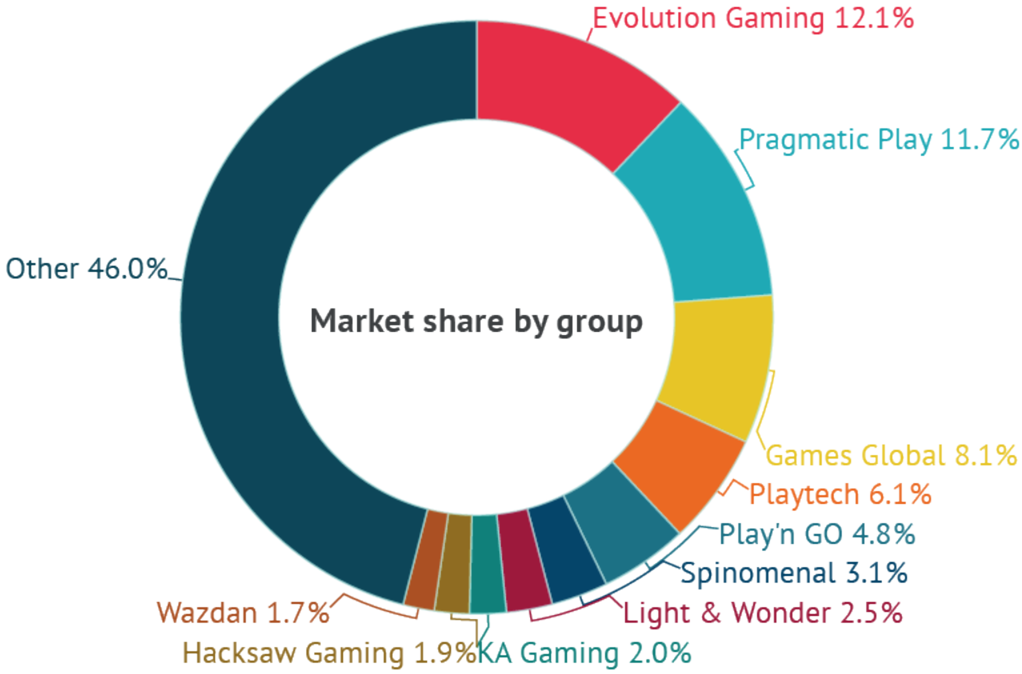
865

NUMBER OF DIFFERENT STUDIOS ACROSS OPERATOR SITES IN Q3 24

3.0 STUDIO OVERVIEW

The top 10 supplier groups have halted the decline in their share of all game tiles globally

In Q3 2024, the top 10 improved their share of all game tile distribution by 0.4%. They now account for 54% of operator site content. Pragmatic Play and Wazdan have made most progress since Q2.



The overall rankings have barely changed although increases from Pragmatic Play suggest that it will take top spot from Evolution Gaming by year end. Evolution's improved distribution of live content offset a decline in its share of slots. Elsewhere, Wazdan has replaced Betsoft Gaming in 10th spot and EGT, just outside of the top 10, is making progress.

Given the increase in suppliers mentioned earlier, the remaining 46% of content for those outside of the top 10 is now shared among an even larger number of studios.

If you were to rank studio groups instead by the unique number of casino sites each has access to, then the rankings would be similar except that IGT, Novomatic and Playson would replace Spinomenal, KA Gaming and Wazdan 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.

Rank	Supplier	No. of sites
1	Pragmatic Play	2,947
2	Evolution Gaming	2,903
3	Playtech	2,411
4	Games Global	2,396
5	Play'n GO	2,288

Rank	Supplier	No. of sites
6	Light & Wonder	2,248
7	IGT	1,788
8	Hackshaw Gaming	1,727
9	Novomatic	1,713
10	Playson	1,647

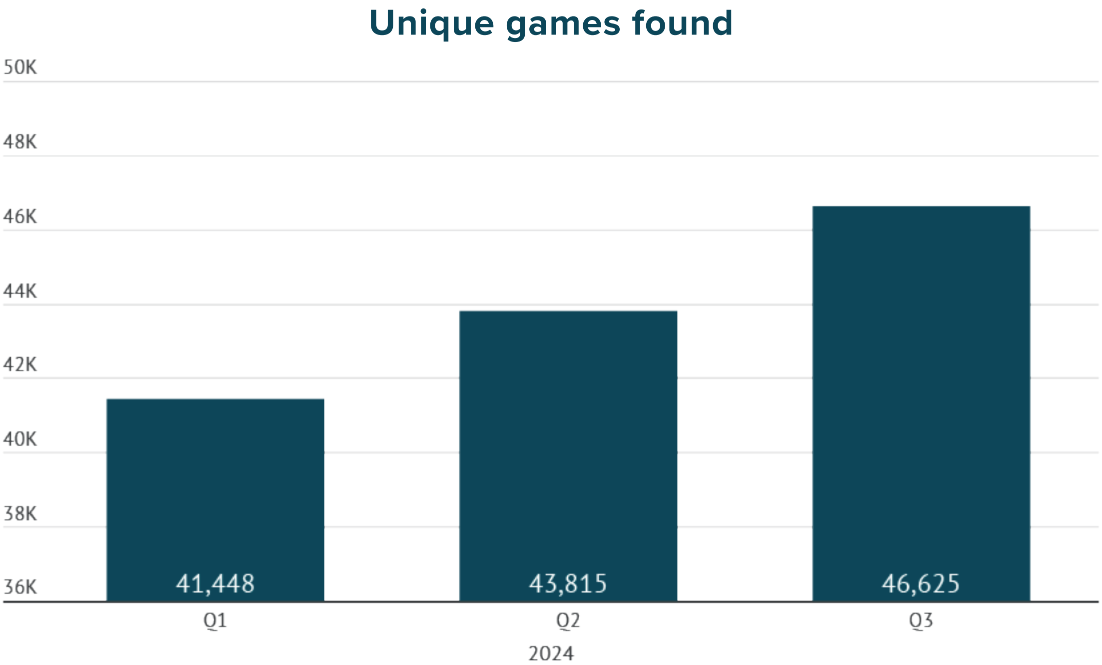
54%

PERCENTAGE OF OPERATOR SITE CONTENT ENJOYED BY TOP 10 SUPPLIERS

4.0 GAMES OVERVIEW

Another 3,000 more games across casino sites this quarter

The number of unique games found increased by about 3,000 games per quarter or nearly 1,000 per month. Around 25 new studios per quarter is just one reason for this. Existing studios have also been ramping up their output in response to increased competition, inevitably leading to a spiralling of similar responses. The main reason, though, is that operators still tend not to retire older titles.



This 1,000 per month increase in games found is slightly lower than the 1,400 games that are launched each month

We tend to add around 1,000 new games each quarter to the dataset but quarters 3 and 4 typically have more game launches than earlier in the year. During the last quarter we added just over 4,300 games (1,400 per month) from 420 studios. The equivalents for this quarter last year were 3,000 from 369 studios.

The average number of game launches per month per studio, when divided by the total number of studios that have games live, is 1.7. If we only consider those studios that actively launched content this last quarter, the figure is 3.4 per month.

Game production stats	Q3 2024	Q2 2024
Average number of games launched per month	1,433	702
Total studios with live games	822	760
Total producing studios	420	350
Average number of games launched per studio per month	1.7	0.9
Average number of games launched per active studio per month	3.4	2.0

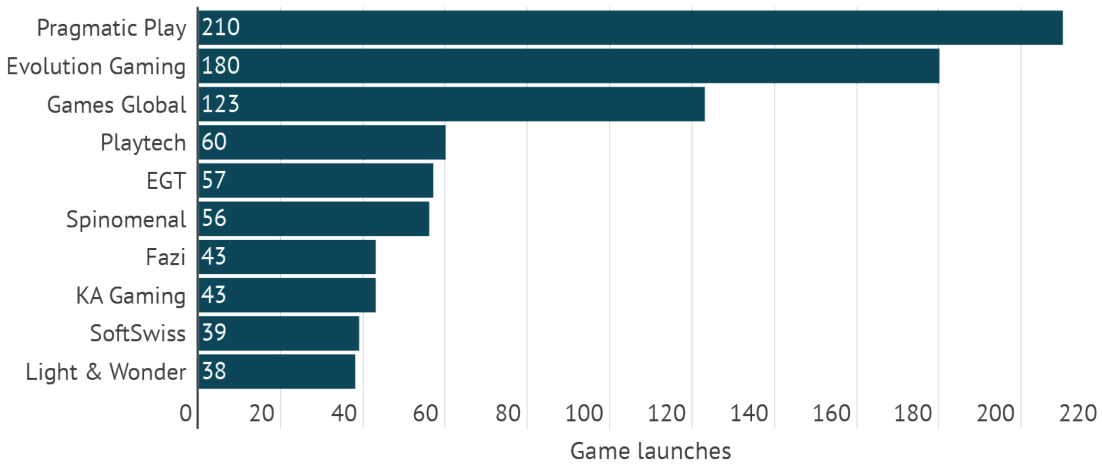
210

NUMBER OF GAMES LAUNCHED BY PRAGMATIC PLAY IN Q3 24

Pragmatic Play remains the largest producer overall, though Games Global is the most prolific slots developer

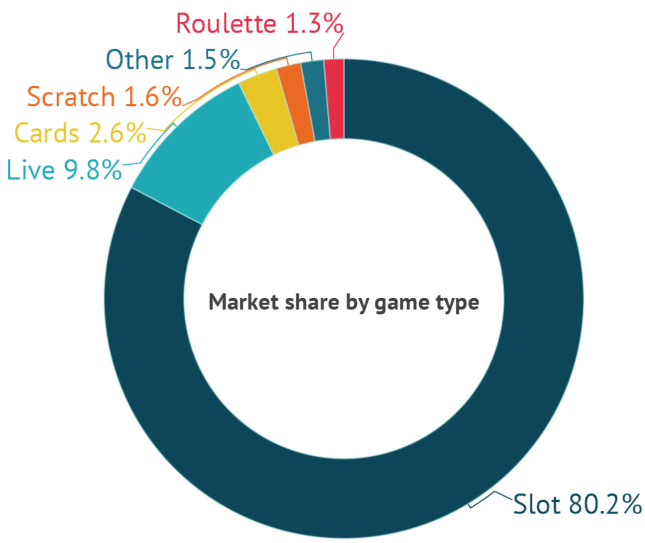
The top three – Pragmatic Play, Evolution Gaming and Games Global – have all increased their output since last year. Games Global, EGT, Pragmatic Play and Spinomenal are the most prolific producers of slot content and Games Global is now launching around one slot per day. New entrants to the top 10 production charts are Fazi (inc. Redstone/Tiptop) and Softswiss (inc. Bgaming/1Spin), while Sega Sammy (inc. Stakelogic/Silverback) is making progress just outside the top 10.

Top 10 game producers



Slots continue to crash as a percentage of content across operator pages

Slots make up most of the content across the 3,500 operator sites that we monitor, but their percentage of total continues to decline. They now account for 80% of all game content across casino pages, down 2% on last quarter and more than 5% from this quarter last year. Live games have most improved their share during that same period. The remainder is down to crash games, which now represent 0.5% of all game tiles.



3.4

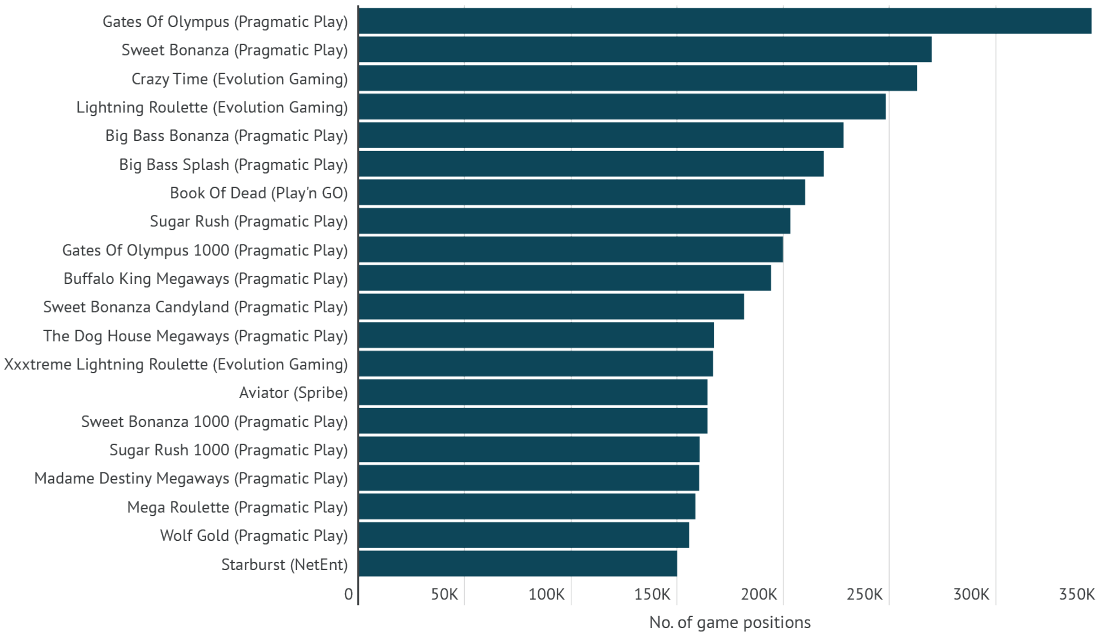
AVERAGE NUMBER OF GAMES LAUNCHED BY PRODUCING STUDIOS EVERY MONTH

Pragmatic Play extends its dominance in the game charts and live content is up

Five live titles in the top 20 is confirmation of the growth in live content outlined on the previous page. Three live games from Evolution Gaming and two from Pragmatic Play plus Aviator (Spribe) are the non-slots games that rank in our top 20 quarterly charts. Note that our quarterly charts *do* include live games unlike our monthly casino dashboards.

Pragmatic Play now accounts for 14 of all top 20 games. Book Of Dead (Play'n GO), and Starburst (NetEnt) complete the chasing pack. The top two, Gates of Olympus and Sweet Bonanza, are at the same spot as they were this time last year.

Top games by number of game positions

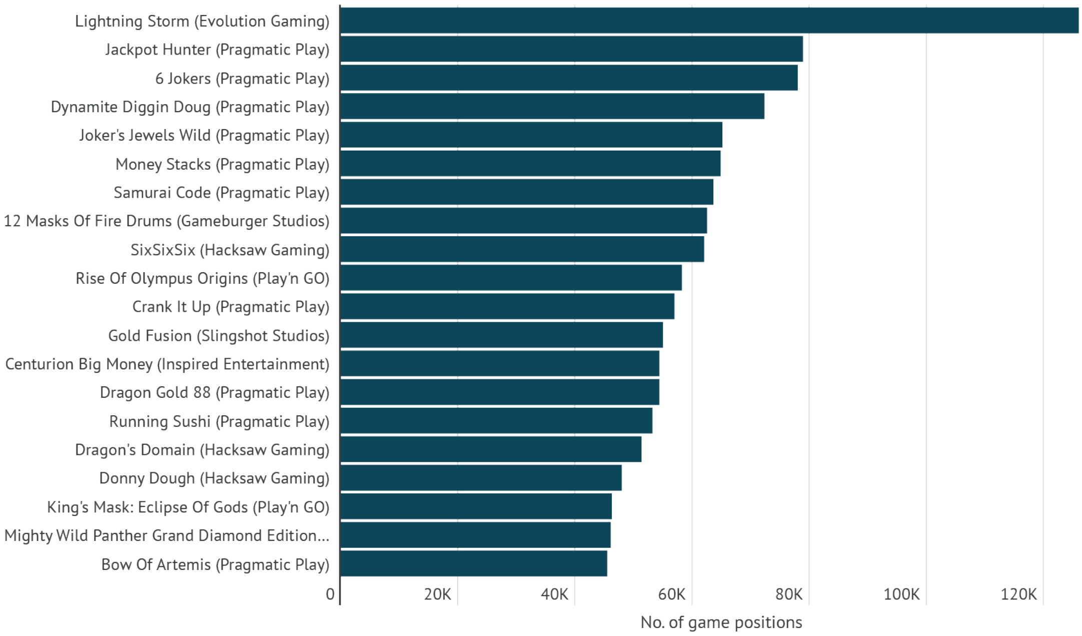


1.5%

BRANDED GAMES' SHARE OF ALL CONTENT IN Q3 24

In the new games chart Pragmatic Play has lost some of its historic dominance. Play'n GO, Hacksaw Gaming, Games Global, Inspired Entertainment and Wazdan have all landed some winners recently. Meanwhile, Evolution Gaming's Lightning Storm takes top spot.

Top 20 new games



High volatility games are on the rise while branded content, Megaways and romance are in decline

High volatility games slightly increased their share of overall game distribution. The ubiquitous 5-reel slots are slightly down while 6-reel games are gaining popularity.

Game feature stats	Q3 2024	Q2 2024
RTP	95.45%	95.43%
Med vol %	34.41%	34.45%
High vol %	29.53%	29.52%
5 Reels %	78.69%	78.98%
% Ways	2.95%	3.02%
% using licensed third party brands	1.55%	1.63%
Action & Adventure	10.50%	10.40%
Latin	1.70%	1.60%
Brown	23.00%	23.00%
Silver	11.40%	11.20%
Pink	0.80%	0.70%

80%

APPROX GAME TYPE MARKET SHARE ENJOYED BY SLOTS, DOWN NEARLY 6% YEAR-ON-YEAR

The ‘ways’ share of all content has decreased from 3.02% last quarter to 2.95% (or 4.17% down from 4.26% of the ‘slots’ game type). MGA, Playtech and Games Global are all growing their share of branded content out there, but the category is down again. Branded games’ share of all content has declined quarter-on-quarter and now represents just 1.55% of all game tiles.

The top themes in Q3 are still Action & Adventure, Luck and Money, all of which increased in popularity. Other growing themes are Latin, Cute, Sports and Crime. Those on the wane include Romance, Magic and Beauty. Some of the most popular game words are Jackpot, Cash, Gold and Lucky.

Popular Words Production

As for colours, silver and pink are in

Black, brown and silver continue to have the greatest share of game colours with silver growing its share and despite the decline in romance and beauty, the colour pink is on the rise.

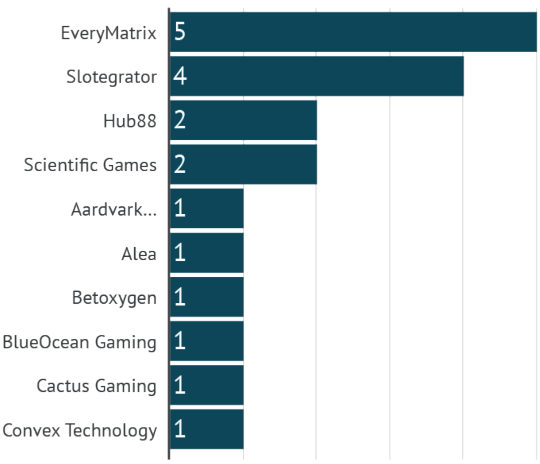
5.0 TOP DEALMAKERS

EveryMatrix, Slotegrator, Bgaming and RubyPlay have been the busiest dealmakers in Q3

The aggregators EveryMatrix and Slotegrator were the busiest in Q3 2024 in terms of integrating new content partners. Meanwhile the studios Bgaming and RubyPlay have been the busiest over this last quarter in terms of securing distribution deals via aggregators or platforms.

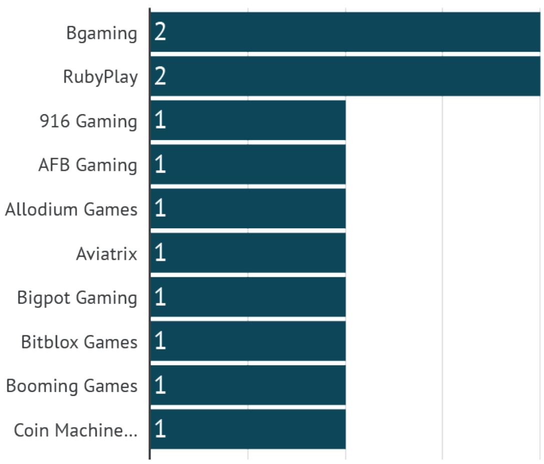
Number of new deals – 28

New deals by aggregators



+ 9 more aggeregators with 1 deal

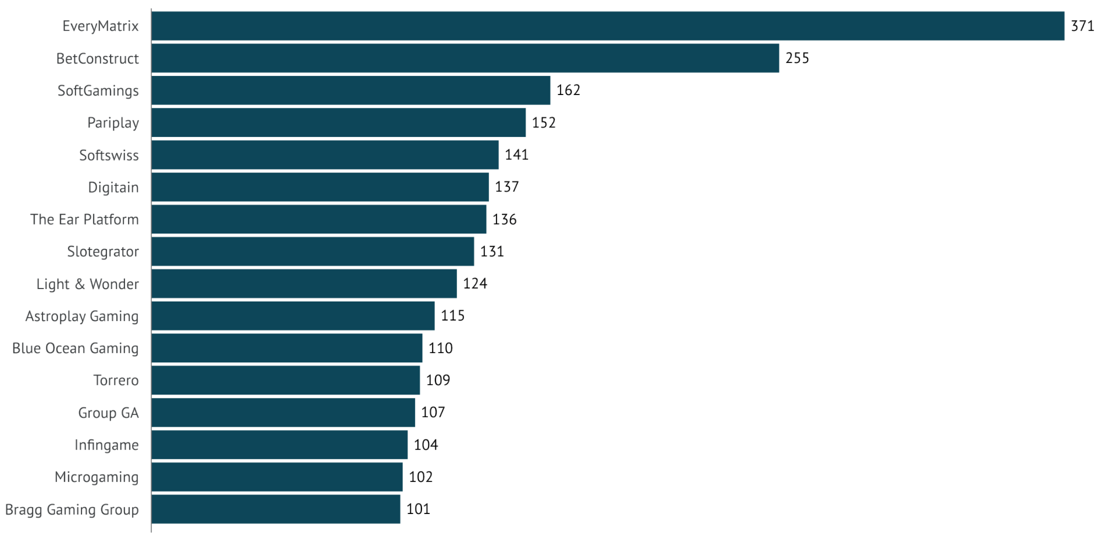
New deals by studios



+ 16 more studios with 1 deal

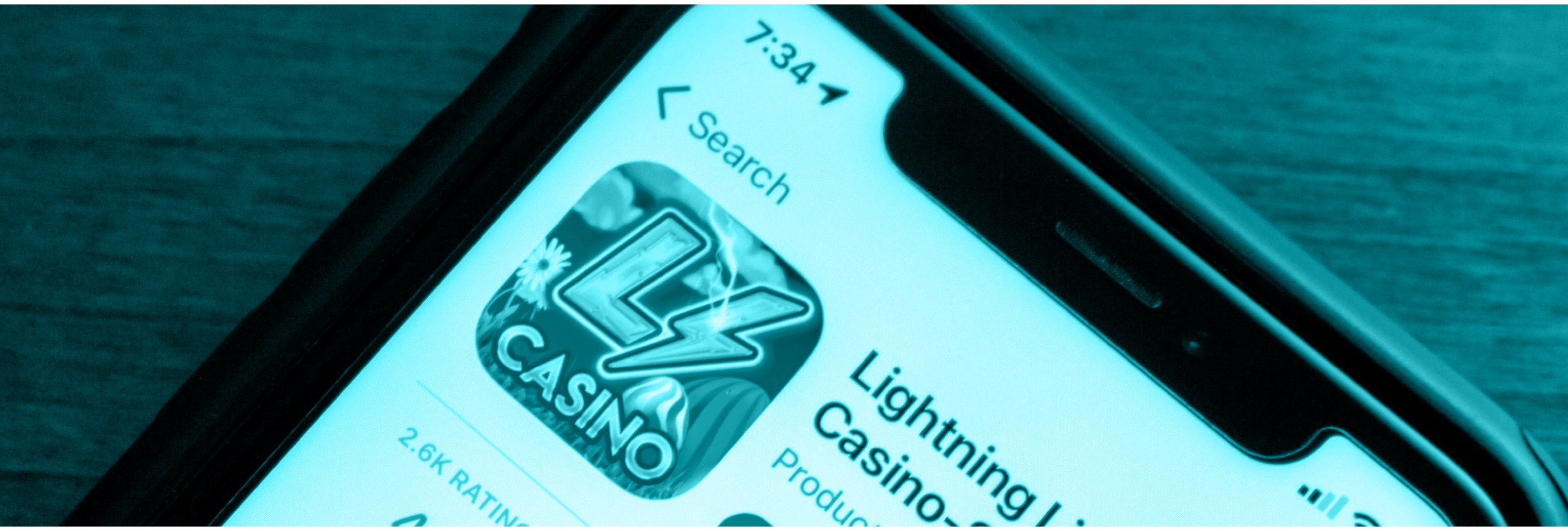
With another 5 studios plugged in, EveryMatrix has pushed ahead as the largest platform overall in terms of numbers of total content partners integrated. It now has access to content from 371 studios (up 30 over this time last year).

Top aggregators by number of studios



23%

PERCENTAGE OF NEW GAMES THAT FEATURE BROWN AS THEIR PREDOMINANT COLOUR



6.0 OPERATOR CONTENT CHARTS

Yet more studios and more games per operator

Operators now offer content from 58 studios on average (the median is 46). Note that quarterly numbers are slightly lower than annual figures.

An average of 954 games can be found per operator (the median is around 350). A handful of operators are now offering over 10,000 games, which clearly skews the averages.

Operator x game/studio stats	Q3 2024
Average number of games on an operator's site	954
Average number of studios on an operator's site	58
Most studios per site	348
Percentage of sites that feature more than 100 studios	20%

20% of operators now have more than 100 studio brands

Operators that pride themselves on their breadth of content are Vbet, apuestatotal.com, Betssen and Betpuan. One in five of all operator sites offer games from more than 100 studios.

7.0 FINAL THOUGHTS

Studios continue to ramp up production as operators expand their libraries of content. This battle for shelf space is clearly not lost on some of the larger supplier groups, many of which are now producing at their faster rate ever. At a recent conference a brand-new studio we encountered had plans to launch a whopping 10 games per month. Yes, they were mostly AI-generated skins of the same engine and aimed at offshore operators where testing and compliance requirements are lighter. But still, 10 games a month by a new entrant is a big number.

Egamingmonitor.com covers 70,000 games, 1,700 suppliers and 3,600 operators. For access to our interactive charts and filters showing game distribution and page positioning by country, by page type, by studio, by operator and more, please get in touch.

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NUMBER OF GAMES USING LICENSED THIRD-PARTY BRANDS

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