

GameRefinery
By Vungle

Casino Snapshot Report

Market, Features & Updates, Motivations

March 2021



GameRefinery uses a three-layered approach to categorize games

- Using a **Category -> Genre -> Subgenre** hierarchy we are able to differentiate games in a meaningful way and offer accurate insights for all individual game types currently found in the market
- Our taxonomy is **created together with industry experts** and is based on thorough testing and data-analysis of the market
- In this report we are focusing on the **Casino category**



GameRefinery's Genre Taxonomy

Short overview of the Casino category



Erno Kiiski

Chief Game Analyst - US

Casino games are a rather odd bunch in comparison to other mobile game genres, as they are not “video games” in the traditional sense, but rather mobile extensions of the real casino world (with the exception that you can’t win real money). Casino games have enjoyed huge success especially in the US, probably due to legislation that has banned real online casino to a great extent. Currently the Casino category generates approximately 17% of all revenues on mobile (Q4 2020 US iOS), the same level of market share it has more or less had over the past years. In other words, Casino games are the second biggest revenue generator in the US after Match3 Puzzle games.

It’s true that Casino subgenres (Slots, Poker and Bingo) differ quite a lot when it comes to core gameplay mechanics, but they share a lot of similarities within other features, especially with the recent surge of collection mechanics. It’s therefore interesting to see how these three subgenres evolve in the future and if they continue to adopt features from other mobile game genres.

In this report we’ll take a closer look at what the Casino category currently looks like in the US, the main market for this genre.



Key points



Erno Kiiski
Chief Game Analyst - US



- During Q4 2020 Casino was the second biggest category in the US, generating 17.2% of all US iOS mobile game revenues.
- Slots games remain by far the biggest Casino subgenre, responsible for 80% of the category's revenue (US iOS).
- The Slots subgenre is highly competitive and there's no clear number one, with the top five titles extremely close to each other in revenues.
- Poker/Cards and Bingo both have one "king of the hill" title making one third or even half of all subgenre revenue.
- There are trending key features that differentiate the top Casino games from the rest (Collectibles, Guild mechanics and Piggy Bank system)
- From a motivational perspective, Casino players are driven by Excitement, Competitive and Collection-based motivations.











Market

- Top games and their market share in the US iOS
- Top games and challengers in the US iOS













Top games and their current market share within the **Slots** subgenre in the US (iOS)

Key takeaways: 1) The five biggest titles in terms of revenue share are pretty even, and there are no big gaps even between the top 10 titles. 2) The competition for the top spot became even tighter during 2020 as Slotomania's lead margin has shrunk.

Slots		2020 Q4		2019 Q4	
<input checked="" type="checkbox"/> Show subgenre share ?		Rev	Change	Rev	Change
	1. Slotomania™ Vegas Casino Slots Playtika LTD Slots	7.85%	-1.58	9.43%	+1.58
	2. DoubleDown™- Casino Slots Game Double Down Interactive LLC Slots	7.21%	+2.75	4.46%	-2.75
	3. Jackpot Party - Casino Slots Phantom EFX, Inc. Slots	6.85%	+2.41	4.44%	-2.41
	4. Cashman Casino Las Vegas Slots Product Madness Slots	6.56%	+2.57	3.99%	-2.57
	5. Cash Frenzy™ - Slots Casino SpinX Games Limited Slots	5.5%	+2.45	3.05%	-2.45
	6. Big Fish Casino: Big Win Slots Big Fish Games, Inc Slots	3.75%	-0.07	3.82%	+0.07
	7. House of Fun: Casino Slots 777 PLAYTIKA UK - HOUSE OF FUN LIMITED Slots	2.83%	-0.73	3.56%	+0.73
	8. Lightning Link Casino Slots Product Madness Slots	2.55%	-0.13	2.68%	+0.13
	9. Huuuge Casino Slots Vegas 777 Huuuge Global Ltd. Slots	2.54%	-0.59	3.13%	+0.59
	10. POP! Slots™ Live Vegas Casino PlayStudios Slots	2.54%	-0.64	3.18%	+0.64










Top games and their current market share within the **Poker/Cards** subgenre in the US (iOS)

Key takeaways: 1) World Series of Poker remains the genre king taking home one third of all Poker/Card game revenue. 2) Competition for second place is heating up as Poker Face and Spades Plus breathe down Zynga Poker's neck.

Poker/Cards		2020 Q4		2019 Q4	
<input checked="" type="checkbox"/> Show subgenre share ?		Rev	Change	Rev	Change
	1. World Series of Poker - WSOP Playtika LTD Poker/Cards	33.99%	-0.87	34.86%	+0.87
	2. Zynga Poker - Texas Holdem Zynga Inc. Poker/Cards	14.47%	-7	21.47%	+7
	3. Spades Plus - Card Game Zynga Inc. Poker/Cards	10.42%	+0.75	9.67%	-0.75
	4. Poker Face - Play With Friends Comunix Ltd Poker/Cards	9.47%	+6.32	3.15%	-6.32
	5. Spades Royale - Best Card Game Beach Bum Ltd Poker/Cards	8.51%	+1.2	7.31%	-1.2
	6. Texas Hold'em Poker: Pokerist KamaGames Poker/Cards	8.42%	-1.03	9.45%	+1.03
	7. Blackjack 21: Blackjackist KamaGames Poker/Cards	4.32%	-1.47	5.79%	+1.47
	8. Pokerrrr 2- Holdem, OFC, Omaha PT.FARM CO., LTD. Poker/Cards	2.94%	+2.94	0%	-2.94
	9. Gin Rummy Plus - Card Game Zynga Inc. Poker/Cards	2.94%	-1.81	4.75%	+1.81
	10. Poker Heat: Texas Holdem Poker Playtika LTD Poker/Cards	1.91%	-0.43	2.34%	+0.43

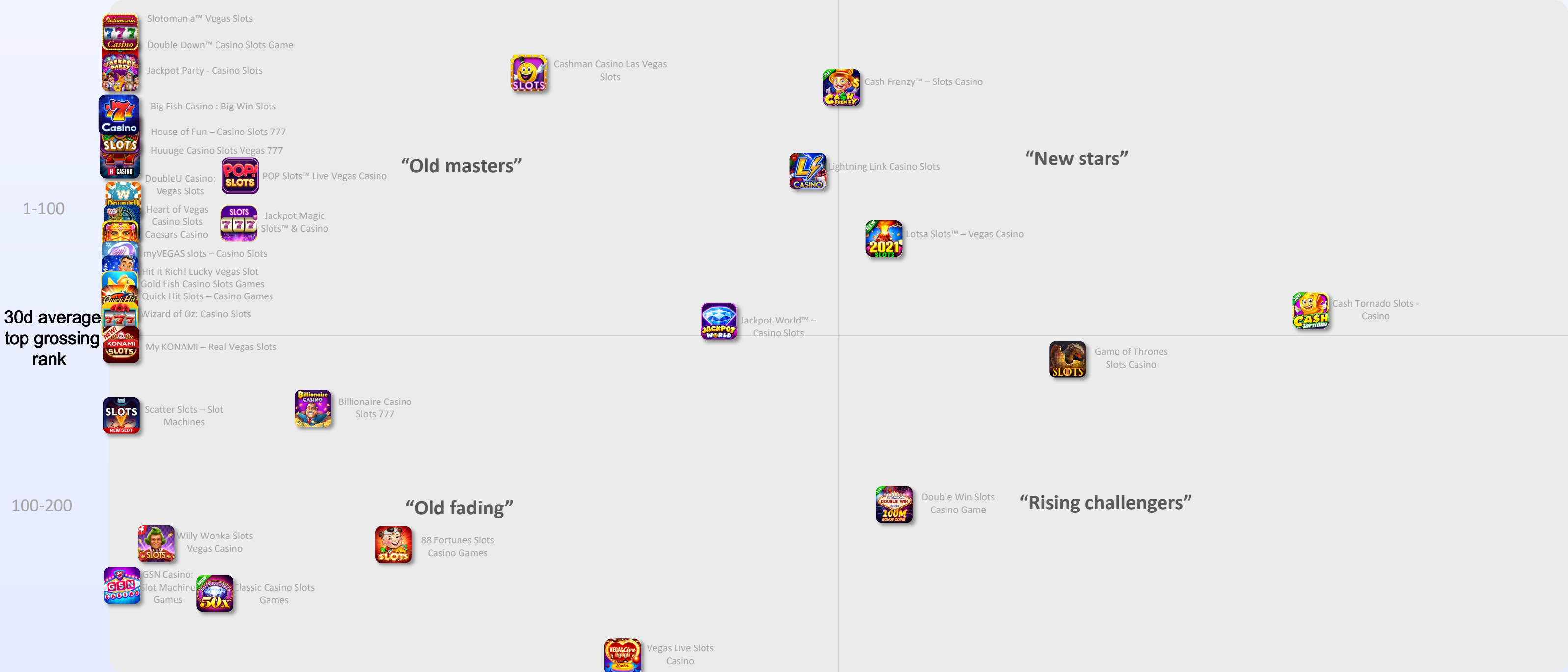
Top games and their current market share within the **Bingo** subgenre in the US (iOS)

Key takeaways: 1) Similar to Poker/Cards, Bingo games have a clear champion with Bingo Blitz reigning supreme. 2) There are several titles behind Bingo Blitz fighting for second place, making the competitive landscape that much more interesting.

Bingo		2020 Q4		2019 Q4	
<input checked="" type="checkbox"/> Show subgenre share ?		Rev	Change	Rev	Change
	1. Bingo Blitz™ - BINGO games Playtika Santa Monica, LLC Bingo	46%	+5.41	40.59%	-5.41
	2. Bingo Party - Slots Bingo Game Avid.ly Bingo	11.45%	-1.41	12.86%	+1.41
	3. Bingo Story Live Bingo Games Clipwire Games Inc. Bingo	11.33%	+11.33	0%	-11.33
	4. Bingo Bash featuring MONOPOLY BitRhymes Inc. Bingo	10.94%	-3.14	14.08%	+3.14
	5. Bingo Journey! Real Bingo Games Elestorm Game Co., Ltd. Bingo	7.67%	-1.76	9.43%	+1.76
	6. Bingo Pop - Bingo Games Jam City, Inc. Bingo	7.19%	-5.78	12.97%	+5.78
	7. Bingo Showdown -> Bingo Live! Spicerack Media Bingo	3.46%	-6.62	10.08%	+6.62
	8. Bingo! Live Story Bingo Games Theotino Bingo	0.98%	+0.98	0%	-0.98
	9. Bingo Frenzy Live Bingo Games Gluon Interactive Ltd. Bingo	0.98%	+0.98	0%	-0.98

Top games and challengers in the Slots subgenre in the US iOS

Key takeaway: The vast majority of top 100 grossing slots games have been in the market for years. They’ve been able to maintain their dominance with only a few newer titles threatening their position.



Top games and challengers in the **Poker/Cards** subgenre in the US iOS

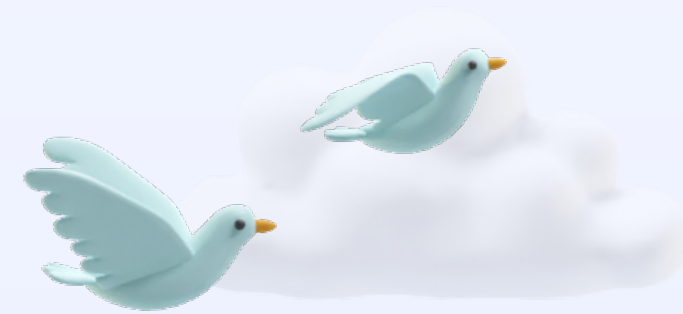
Key takeaway: The Poker/Cards subgenre hasn't been able to deliver too many top 100 grossing titles. World Series of Poker still remains the top dog, but Poker Face is an interesting rising challenger to keep an eye on during 2021.



Top games and challengers in the **Bingo** subgenre in the US iOS

Key takeaway: Similar to the Poker/Cards subgenre, only a handful of Bingo games have been able to sustain a top 200 grossing position in the US. Bingo Blitz remains the genre king, with few new titles rising to the top charts.





Features & Updates

- Feature data
- Implementation examples

Differentiating feature data within the **Casino** category

	Overall Popularity	Top 20% Popularity
Live events - Recurring	81%	100%
Live events - Non-recurring	78%	93%
Progressive jackpot (slots games)	66%	93%
Piggy bank	36%	87%
Dynamic competitive league/ladder	68%	80%
Send/ask help	71%	80%
Daily quest	62%	80%
VIP system	63%	73%
Incentivized social media connection: New features & Free gifts	37%	60%
Number of different material items to purchase: 7+	30%	60%
Special live event currency/materials	32%	60%
Special PvE modes/levels	47%	60%
High Roller/VIP Rooms (slots games)	40%	60%
Number of different material items: 7+	36%	60%



Erno Kiiski

Chief Game Analyst - US

The chart on the left provides insight into the utilization of different features in the Casino category. Here you can see some of the “key features” that the most successful fifth of casino games utilize on a much higher rate than other casino games. In other words, these key features differentiate the best from the rest.

For example, having lots of material items (in the casino game context this means collectible items to complete a full collection set) is a feature shared by 60% of the top Casino games, whereas it is only used by 36% Casino games overall.

You can dive deeper into the feature data by logging into the GameRefinery SaaS platform.

Interesting feature examples from top Casino games: Collectible albums

Albums with various collectible items (stickers, cards, stamps etc.) have become increasingly common in Casino games. The idea is either to get additional rewards for completing the sets or just to be able to brag to other players with exclusive collectibles.



Slotomania



Zynga Poker



Cashman Casino Las Vegas Slots



Bingo Blitz



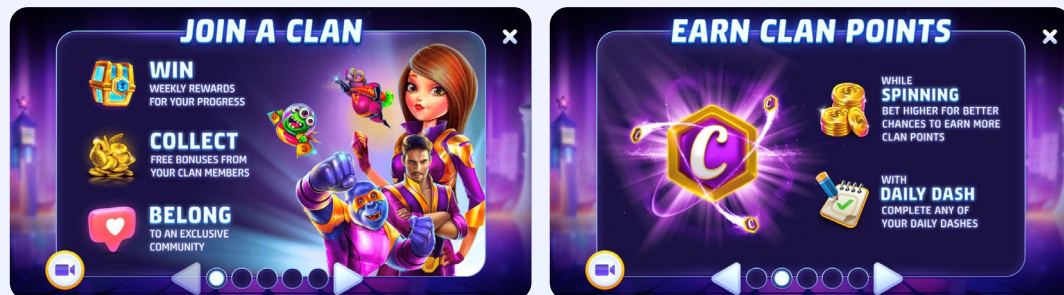
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Collectible albums and items are a great fit for Casino games as they don't affect the core game experience and hence don't seriously risk its balance. In other words, collectible mechanics are a flexible way of increasing the sense of accomplishment and progression in all Casino games.

Collection mechanics have trended tremendously within the category and nowadays it's hard to find a top Casino game without these mechanics in place.

Interesting feature examples from top Casino games: Guild Mechanics

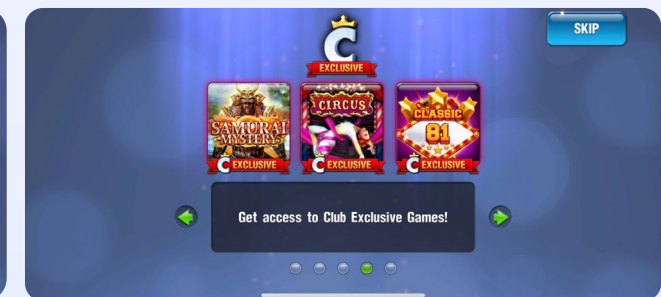
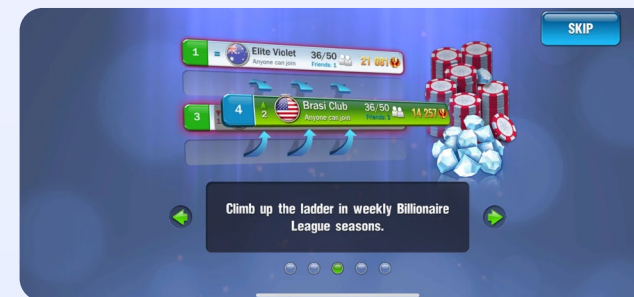
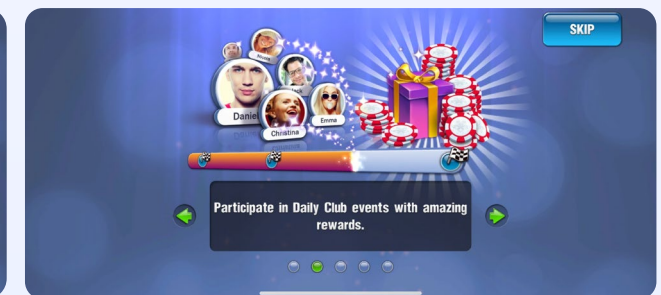
Social play and communities are trending across all mobile games, and the Casino genre is no exception. Guilds/teams act as a great foundation upon which other social features (co-op tasks, team competitions etc.) can be built.



Huuuge Casino Slots Vegas 777

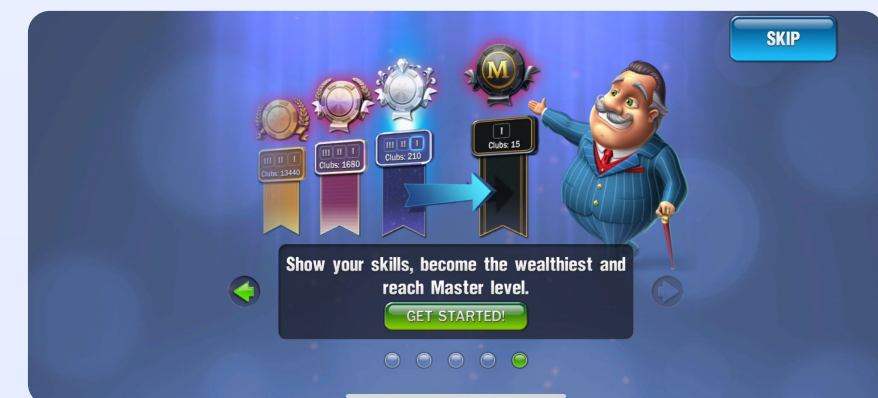


The Billionaire League Clubs let you join forces with other players and play together with them in competitions, events and exclusive games. You can also upgrade your Club and increase the maximum number of members by collectively donating chips.



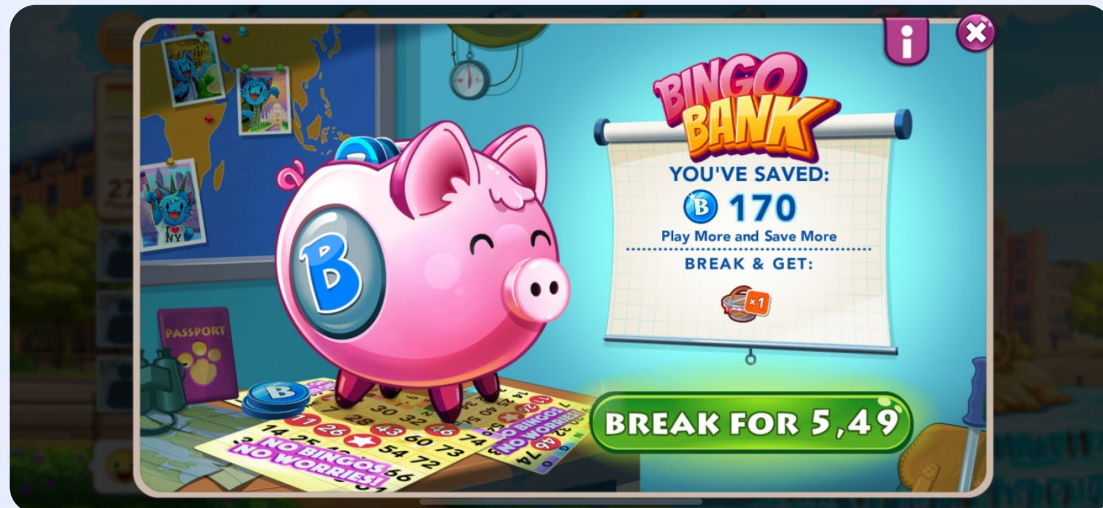
Slotomania

As an addition to the usual co-op tasks and communal rewards, in Slotomania's Clans you can also trade collectibles with your clan-mates, resulting in nice synergies with the game's Album mechanics.



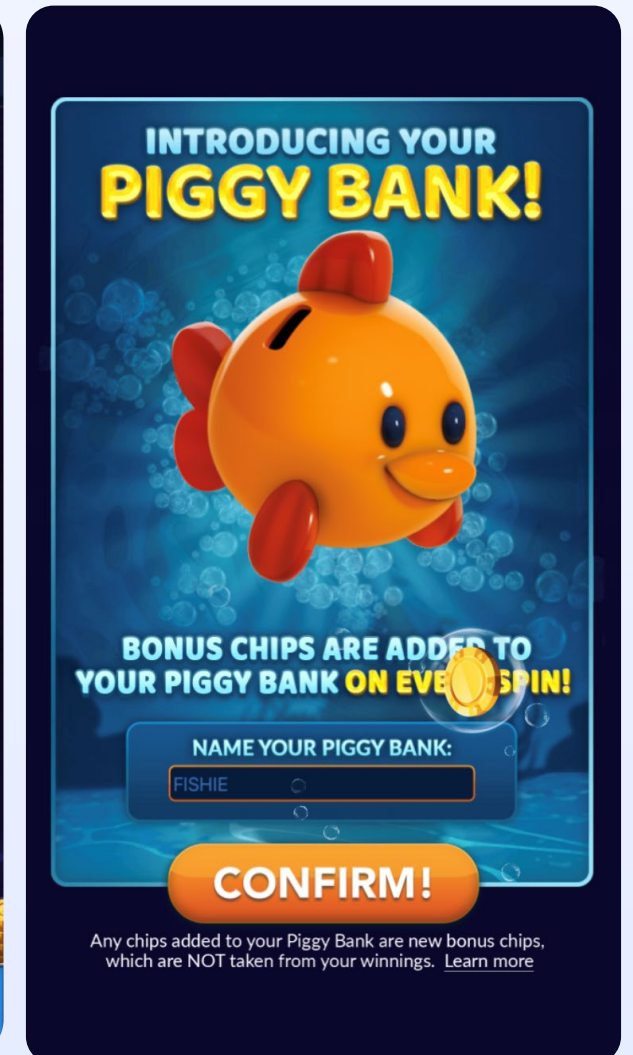
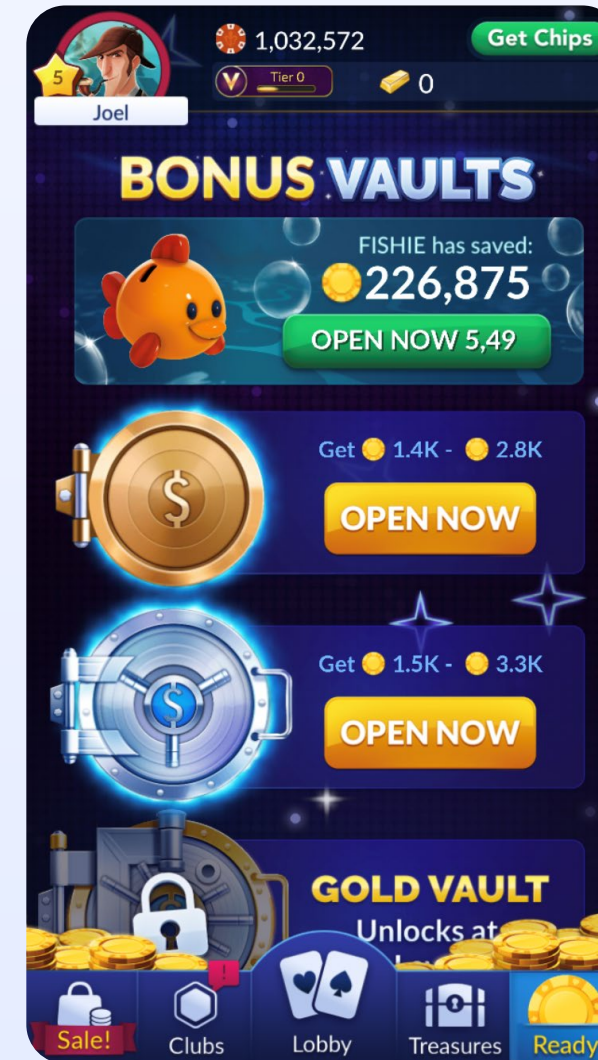
Interesting feature examples from top Casino games: Piggy Bank

The Piggy Bank system is a monetization feature that infuses core gameplay progression with an IAP-transaction. You fill up your piggy bank (usually with premium currency) by playing the game and once the piggy is full, you can purchase its contents with real money.



Big Fish Casino

Big Fish Casino has implemented a very traditional version of the Piggy Bank. Each spin you make on the slots machines adds extra chips to your bank which you can open by making a real money IAP-transaction. The more openings you make, the higher level your piggy bank gets (= more extra chips stored with each spin).



Bingo Blitz



In Bingo Blitz your Piggy Bank savings grow every time you don't get a bingo and you can use boosts to increase your bingo savings rate. Once you've accumulated enough credits, you can break the piggy by making a real money IAP-transaction.



Motivations

- The motivation framework
- Casino game motivational map



GameRefinery's Motivation Framework

- GameRefinery uses a proprietary motivation model consisting of twelve different Motivational Drivers, each covering a separate player root motivation.
- These Motivational Drivers are also grouped based on their nature to form meaningful pairs or “motivational groups” - for example Improving skills and Completing Milestones fall under Mastery.
- Motivation results are based on a survey including over 7000 respondents. The survey was targeted towards mobile game players in English speaking western countries (US, UK, Canada, New Zealand and Australia). The sample is representative of the smartphone users when it comes to age, gender, income and household size.



Social - Working With Others



Expression - Role-playing & Emotions



Social - Competing Against Others



Expression - Customization & Decoration



Mastery - Improving Skills



Exploration - Discovering New Worlds



Mastery - Completing Milestones



Exploration - Collecting Treasure



Management - Strategic Planning



Escapism - Thinking & Solving



Management - Resource Optimization



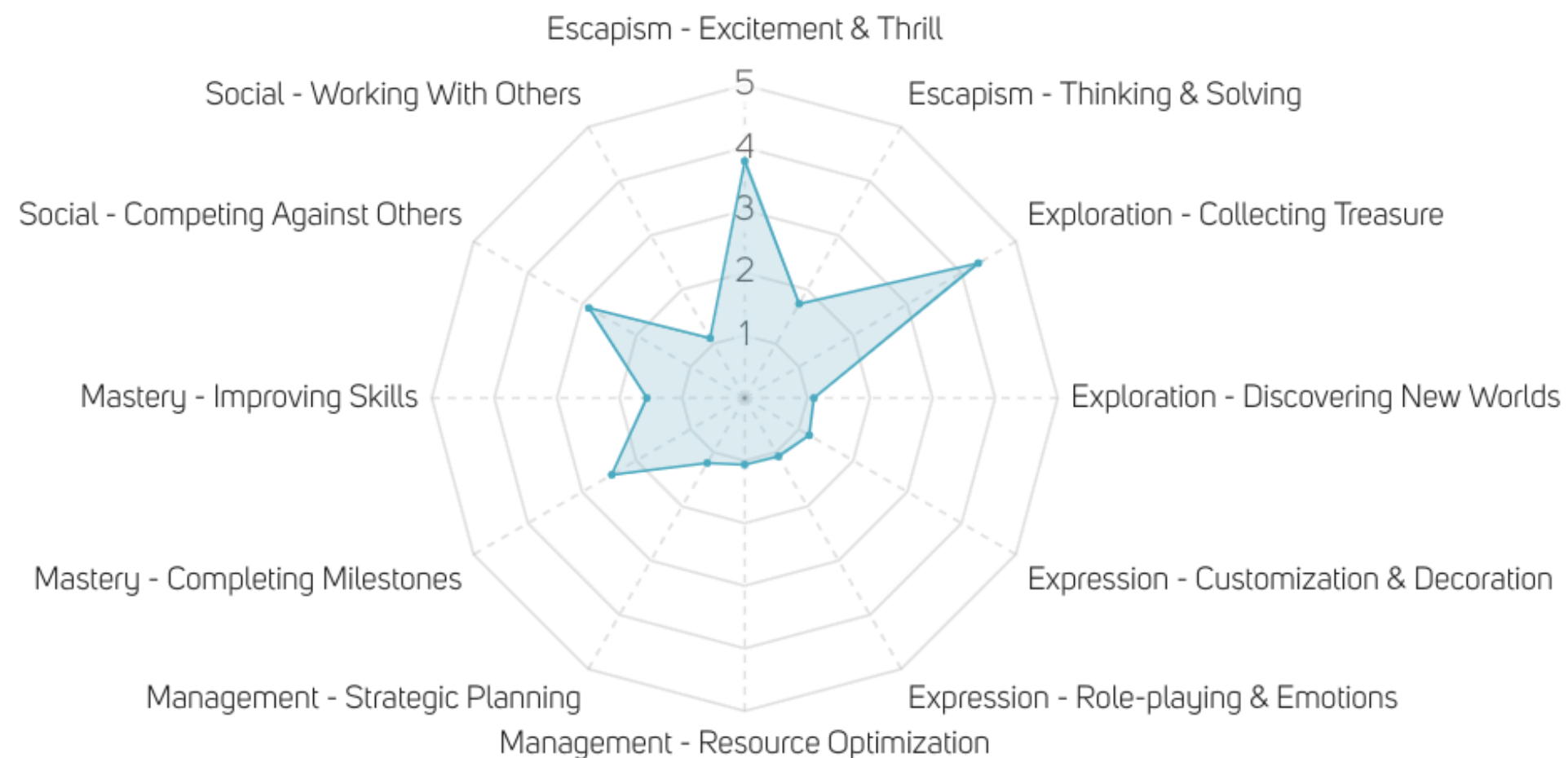
Escapism - Excitement & Thrill



Average motivational map for Casino games

Motivational drivers describe the main reasons players enjoy playing the game.

Score 5 = very important, 1 = not important



Erno Kiiski

Chief Game Analyst - US

Looking at the motivational map of Casino games we can see that on average these games thrive on exciting & thrilling gameplay and the possibility to collect treasures (i.e. collectible items and chips). Also, competitive aspects play a rather significant role in a Casino game players' motivational hierarchy, which is especially important in the Poker/Cards subgenre.

When looking at the high importance of the Collecting Treasure motivation, it's no surprise that almost all top casino games (no matter the subgenre) have turned to various collectible mechanics to cater to their player bases' wants & needs.



Erno Kiiski

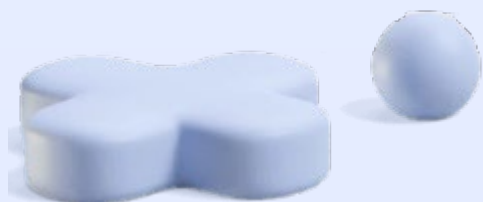
Chief Game Analyst - US

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AUDIOVISUALS AUDIOVISUALS

MONETIZATION AD MONETIZATION GACHA IAP & MONETIZATION TRADING & ECONOMY

SOCIAL COMPETITION & PVP SOCIAL INTERACTION

RETENTION APPOINTMENT MECHANICS LIVE EVENTS SESSION LENGTH

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Competitive co-op - Guild wars/competitions	907 examples	Select
Competitive co-op - Other	379 examples	Select
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IMPLEMENTATION EXAMPLES

SHOW LESS SELECT ALL CLEAR GAMES 68/68

Guild mechanics

State of Survival: Zombie War
KingsGroup Holdings
Version 1.71

State of Survival: Zombie War
KingsGroup Holdings
Version 1.71

State of Survival: Zombie War
KingsGroup Holdings
Version 1.71

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