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The 2025 Playbook
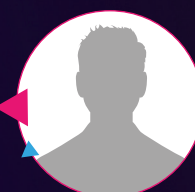
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Contributors

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Methodology

In Q3 of 2024, iGX Insights surveyed 100 Heads of Marketing, CMO's, Brand Directors and similar executives from iGaming organisations across Europe, to find out about how the industry is continuing their gamification efforts, and the impact AI is having on iGaming.

The survey was conducted by appointment over the telephone. The results were compiled and anonymised by iGX Insights and are presented here with analysis and commentary by Optimove and the iGX community.

The topics detailed in this report will be covered at our iGX event in June 2025.

Which of the following best describes your job title?

Marketing Director/Head of Marketing
25%

CMO
10%

Brand/Commercial Director
10%

Partnerships Director
10%

Head of Acquisition Marketing
10%

Head of Growth Marketing
10%

Head of Retention Marketing
10%

Head of Martech/Marketing Transformation
5%

Head of Affiliate Marketing
5%

CCO (Chief Commercial)
5%

Where is your organisation located?

United Kingdom **20%**

Nordics **15%**
(Denmark, Finland, Norway, Sweden)

Germany **10%**

Netherlands **10%**

Eastern Europe **10%**
(Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Slovakia)

Belgium & Luxembourg **10%**

Switzerland **10%**

United States & Canada **10%**

Ireland **5%**

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Key Findings

The Age of Gamification

With 100% of respondent organisations using gamification to some extent, companies realise the potential of gamification and its ability to enhance player lifetime value and the overall gaming experience. Our results reveal most organisations are using a plethora of gamification types, and that gamification is being adopted at scale.

Player Data Key in Gamification Strategies

Understanding player behaviour holds the key to a successful gamification strategy. Respondents told us they use player data to match exclusive odds based on tendencies and success, adjust the pace of games depending on how a player engages with them, and to suggest certain games depending on betting styles. All of this has a massive impact on the player experience, and player data is critical in these efforts.
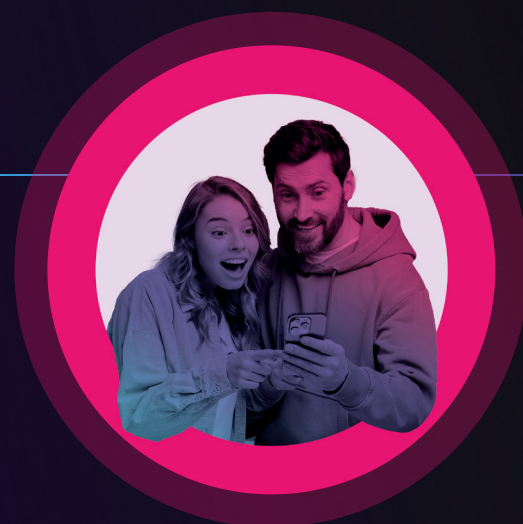
Generative AI is a Top Priority

It comes as no surprise that artificial intelligence (AI), particularly Generative AI, is a major focus for iGaming companies. Our research confirms this, with 100% of respondents either having an existing AI strategy or actively developing one.

AI Drives Enhanced Customer Experiences

The rapid emergence of new Gen AI platforms can make it difficult to determine the most effective applications. However, for those already leveraging Gen AI, its primary use cases are clear: 75% employ it for personalised promotions and offers, while 64% utilise it for automated content creation.

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Making Gamification in iGaming "Just Right"

by Pini Yakuel

Gamification in iGaming is reaching ubiquity

It is underscored by the survey results that revealed that 100% of iGaming operators are using gamification "at least sometimes," with more than 60% using it "to a great extent." In addition, more than 60% are already using GenAI for personalised experiences, with over 70% leveraging it for targeted promotions and offers, and more than 60% for automated content creation. With gamification as a staple in the iGaming world, the challenge is no longer just about implementing gamified elements—it's about delivering the right level of personalised gamification to keep each player engaged, satisfied, and loyal.

In iGaming, achieving the ideal balance—where challenges are engaging but not overwhelming—can significantly impact player retention and satisfaction. This "Goldilocks Zone" ensures that players are neither bored with too-easy tasks nor frustrated by those that are too hard. When operators can consistently provide experiences that feel "just right," they create an environment that keeps players coming back.

Finding the "Goldilocks Just-Right Zone" in Gamification

The "Goldilocks Zone" is the ideal middle ground for keeping each player engaged and motivated to progress without feeling overwhelmed. Fun, not frustrating. Easy, but not boring. Since each player progresses at a different pace and has unique preferences, keeping them in this optimal zone requires a dynamic approach. By leveraging AI and machine learning, operators can create adaptive gamification elements that evolve alongside players, adjusting levels of difficulty and types of rewards based on individual behaviour and skill level.

Key Capabilities Needed for Just Right Level of Gamification

To maintain this "just right" level of personalised gamification, iGaming operators need specific capabilities that allow for deep personalisation and real-time orchestration:

- **Real-Time Personalisation:** Effective gamification in iGaming requires real-time adjustments based on individual player behaviour. With the ability to segment players and respond instantly to their actions, operators can offer personalised challenges, rewards, and missions that match each player's skill and interest level. This keeps gameplay fresh and engaging, enhancing player satisfaction and loyalty.

- **Integrated Campaign Orchestration:** Gamification elements should seamlessly connect with broader marketing campaigns and be available across all player touchpoints. By integrating gamification with other CRM Marketing strategies, operators can create a unified experience, whether the player is interacting on mobile, web, or in-app. This unified approach strengthens player engagement and ensures that all brand interactions are relevant and immersive.

- **Insightful Measurement and Multi-Touch Attribution:** To the effectiveness of gamification efforts, operators need detailed analytics that reveal the incremental impact of gamified interactions on key performance indicators (KPIs). By accurately measuring engagement levels, conversion rates, and retention tied to gamified elements, operators can refine their strategies, focusing on the features that provide the greatest value.

- **Continuous AI-Driven Optimisation:** AI and machine learning play a crucial role in refining gamification strategies. Through continuous analysis of player interactions, AI-driven systems can recommend optimisations for gamified campaigns, suggesting adjustments to challenges, rewards, and missions to maximize effectiveness. This proactive approach helps operators stay in tune with player preferences and market trends, ensuring that their gamification remains compelling and relevant over time.

The Future of Gamification in iGaming

As gamification becomes more prevalent, simply adding gamified elements isn't enough for operators looking to differentiate themselves. The key to long-term success lies in creating a dynamic and personalised experience that resonates with each player. Personalised challenges, tournaments, and achievements—identified by survey respondents as some of the most effective elements—are powerful tools for driving engagement when they are tailored to individual player needs.

While GenAI is increasingly used to enhance these personalised experiences, it is essential that operators apply human oversight to ensure the authenticity and quality of AI-generated content. With the right combination of technology and human insight, iGaming operators can forge deeper connections with players, fostering loyalty and maximizing lifetime value.

In Summary: Be Positioned to Thrive

To successfully leverage gamification, iGaming operators must focus on delivering experiences that feel uniquely tailored to each player. Achieving the Goldilocks Zone—where players feel consistently challenged but not frustrated—can significantly boost engagement and loyalty. As gamification becomes more integral to the iGaming experience, operators who invest in advanced personalisation, real-time orchestration, and data-driven optimisation will be best positioned to thrive.

# Part One
Personalising gamification for each player

While it may have been difficult to prove the impact of gamification on revenue in the past, our research indicates iGaming organisations now recognise its value and are increasing the efforts in this area. Every respondent to our survey confirmed their organisation's use of gamification to some extent, signalling its widespread adoption as a value-adding strategy.

To investigate this view further, we asked respondents to identify the types of gamification elements they have found most effective. Interestingly, only 7% seperated the most popular answer (achievements and badges) and the fifth most popular answer (quests and missions). Not only are iGaming companies using gamification on a small scale, they are implementing a wide breadth of elements, all of which are proving effective. Tournaments and competitions (54%) and personalised challenges (52%) also emerged as popular and effective strategies. Ultimately, a gamification strategy can only be effective if players are offered a range of elements which suit their playing style.

The role player data plays in any successful gamification strategy cannot be overstated. By understanding when, where, what, how, and for how long players interact with gamification offerings, organisations can tailor the approach to maximise engageent. According to our survey, organisations are using player data to customise the gamification experience in various ways. This includes creating custom betting leagues, offering game modes aligned with player betting styles, and adapting multiplayer games to match competitive tendencies.
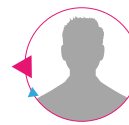
Is your organisation using gamification to engage and retain players?

- 45%
- 55%
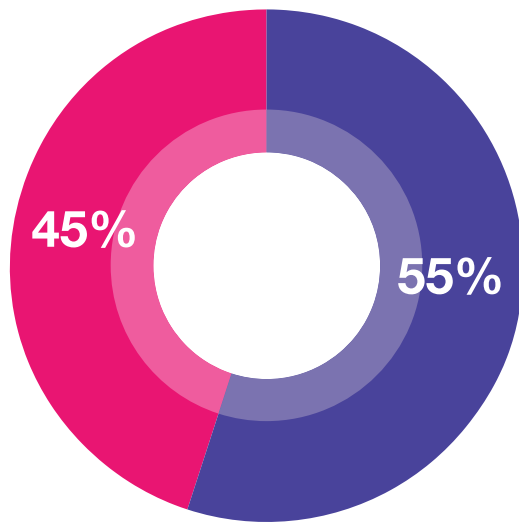
- Yes, to a great extent
- Sometimes

"I think there has definitely been a shift over the last decade to further ways of engaging customers. Not only through gamification, but also through personalisation intertwined with gamification. We are using gamification in a variety of different ways - usually around bonuses and props, depending on the platform."

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For those whose organisations are using gamification, what types of gamification elements have you found most effective in increasing player activity and loyalty?
(Respondents were asked to select all answers that applied)

Achievements and Badges

54%

Tournaments and Competitions

54%

Personalised Challenges

52%

Mystery Rewards and Surprise Gifts

49%

Quests and Missions

47%

Loyalty Programmes

46%

Progress Bars and Levels

43%

Reward Systems

38%

Leaderboards

34%

Virtual Goods and Avatars

25%

"The survey results underscore the growing importance of personalisation in gamification for iGaming. We've observed that personalised challenges, tournaments, and achievement-based rewards play a critical role in enhancing player engagement and loyalty. With over half of respondents, primarily heads of marketing at leading iGaming operators, ranking these elements as most effective, it's clear that personalised gamification is not only a key driver of activity today but will be even more essential in the future. As player expectations evolve, operators that invest in tailored experiences will be best positioned to retain loyal players and drive long-term value."

Motti Colman
VP Revenue, Gaming
Optimove

"One thing that really came out in the research was "player lifetime value" and how to stabilise and even increase it. Gamification is a great way of doing this, and so many industries are using gamification with great results. This comes with increasingly competitive and demanding expectations from customers because of exposure to many industries already using gamification in social media and mobile gaming – the technology is already out there and well-used. With so many respondents implementing a variety of gamification elements, it suggests there has been a shift from a previously unsure approach about how to directly correlate gamification with revenue, to genuine commitment and significant investment. Companies are really seeing the value in gamification now, creating a new competitive dynamic in the market."

Gabriela Martins da Silva
Content Director
iGX 2025

"We're certainly using loyalty programmes. We are also looking to integrate various AI technologies and machine learning into our gamification efforts.

Ultimately, we are trying to offer a truly personalised experience. I think reward systems can become quite generic and homogenised. We are trying to understand our customers' behaviour as much as we can, and then treat that customer as a singular customer rather than just a generic customer."
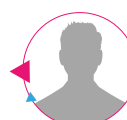
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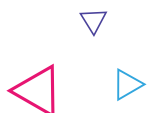
We asked respondents how their organisation uses player data to personalise the gamification experience and cater to different player segments. Here is what they told us:

"We create personalised goals for players according to their strategies."

"Connecting players who share similar interests or gaming styles."

"Progression is based on how players handle betting outcomes."

"We offer promotions and rewards that matches players interests."

"We segment the database into dif-ferent cohorts based on player value."

"Loyalty programmes for players dep-ending on how consistently they have engaged with us."

"I think the undertone of a lot of the results in the Playbook is on "player lifetime value", which requires an exceptionally robust master data foundation when it comes to your players, the key areas being data integrity and actionable insights you can report. Data has changed so much in the past 10 years that to gain the insights we now need, companies would have needed all this data for the past decade, and you can't regain it if it was never collected. The question is how do we fill that gap?

It's great to see that respondents have said they're using personalised goals for players, which is more about collecting "psychographic data". We want to entertain players and ensure they are having a positive experience while engaging with our platforms, so understanding their behaviours and tailoring their experience depending on how they play is critical."

Gabriela Martins da Silva
Content Director
iGX 2025

"I definitely think starting with the segmentation is important and we certainly have that in place. At the moment however, I think the pieces we're working on will be much more interesting for next year. From loyalty schemes to bespoke promotion mechanics, we're working on some great things."

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Part Two
AI in iGaming

AI solutions are being increasingly adopted by iGaming organisations across Europe. Gen AI, in particular, is enhancing the way player data is analysed and the insights that can be obtained. Our results reveal that 61% of organisations have already deployed Gen AI solutions to enhance player personalisation, and a further 39% have plans to. Among those currently utilising Gen AI, the most popular applications are personalised promotions and offers (75%), automated content creation (64%) and predictive analytics (54%).

We also asked respondents how AI orchestration is helping their organisations predict player behaviour and leverage these insights to enhance the gaming experience. From foreseeing when players are ready for new bets and challenges to anticipating shifts in engagement and adjusting game difficulty, the responses illustrate the diverse ways AI is empowering organisations to improve the playing experience.

As players expect personalised experiences in various aspects of their lives, iGaming organisations must adapt to meet these expectations. One crucial area is content recommendation, ensuring the right content reaches the right individuals and aligns with marketing campaigns. Through personalisation, respondents to our survey are able to recommend content that matches betting patterns and suggest bets at optimal moments. Player data and personalisation also enables organisations to predict future bets that players are most likely to engage with.

The industry is collecting more data than ever, and with that comes a huge opportunity to tailor the betting experience to each player. With AI solutions enhancing data analysis capabilities, player behaviour can be understood with greater accuracy, ensuring the delivery of relevant bets, games and content at the right time. While having a sufficient data analytics framework in place remains a key challenge, the opportunity for iGaming organisations is huge.

We asked respondents how AI-orchestration is helping their organisation predict player behaviour, and how they use these insights to enhance the gaming experience. Here is what they told us:

"AI-orchestration personalises challenges for players based on how they respond to promotions."

"Tracking betting habits to suggest breaks or offer new content to players."

"With AI-orchestration, we are able to foresee when players are ready for new challenges or riskier bets."

"Customising support and tutorials in games depending on player's skill level."

"We use AI to track changes in player behaviour and make adjustments for making the gameplay more engaging."

"AI gives us insights into when players are most active and deliver promotions at the best times."

"AI in iGaming is fascinating right now because many individual countries are [or will soon be] implementing their own regulations on how to use AI. Supposedly, there will also be a GDPR update that revolves around the use of AI and data. AI can allow companies to understand and predict so much about players, such as predictive data on behaviour and where the player is most likely heading long-term, be it safe or unsafe. Additionally, AI can help companies build preventative interventions into the player journey which enhances fun factor and reduces the less fun experiences of repetitive gaming losses.

AI can also tell us when a customer might be a seasonal player and allow marketing to adjust strategy and reduce effort re-engaging these groups in the off seasons, and pick things up when the sport season restarts. Overall, there are some very interesting answers here, and I think knowing when to engage with a player mid-game is another massive opportunity. There has always been a big friction element in this, and predicting the best time to send a notification so the gaming experience isn't interrupted will be a great element AI can bring."

Gabriela Martins da Silva
Content Director
iGX 2025

"We are looking at a mix of all of those at the moment. For me, I'm interested in how we can create the best, safest customer experience. AI can help those newer customers avoid the pitfalls that can come from this sector, so that it's easier to keep customers early on in the relationship.

I think the industry has, certainly for the last decade typically put the onus on the customer to self- exclude, rather than for us to come in and intervene in earlier stages. With AI, you can spot those behaviours much sooner, and nudge new customers back in to a safer way of playing."

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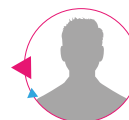
Does your organisation currently deploy Gen AI solutions to enhance player personalisation?

39%

61%
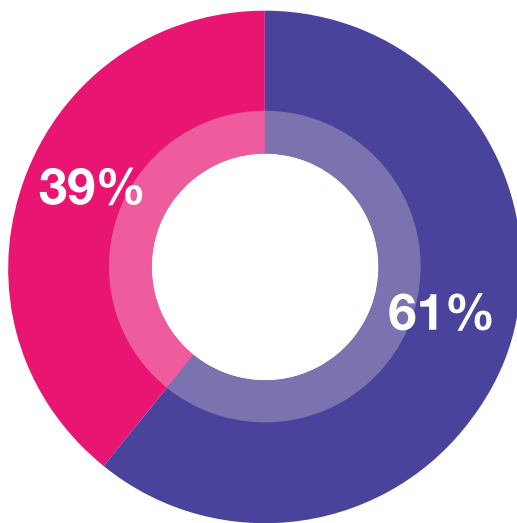
■ Yes

■ No, but we plan to

"It would be interesting to explore whether those who answered 'no' are in fact operators in markets facing upcoming regulatory changes, which could be making them cautious about adopting new AI solutions. However, it's important to note that implementing Generative AI solutions successfully also requires a strong data foundation. Any gaps in data can lead to inaccurate results, introducing potential risks when deploying these technologies. That said, it's clear that AI is poised to become a cornerstone of the gaming industry, and the number of companies leveraging Generative AI will only increase in the coming years."

Gabriela Martins da Silva
Content Director
iGX 2025

"I think there is possibly a self-inflicted pressure to use Gen AI solutions in the industry, but I think it's because people are fascinated by what AI can do. I think there was a similar attitude when the internet first was introduced. At the minute we are in the discovery phase, and particularly for ideation purposes such as creative marketing, it can help you to come up with loads of ideas very quickly. Then, it's on the human to refine that and use their traditional skillsets to produce quality outcomes."

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For those who answered 'yes', how does your organisation use it?
(Respondents were asked to select all answers that applied)

Personalised promotions and offers

75%

Automated content creation

64%

Predictive analytics

54%

Automated personalised campaigns

48%

Chatbots

46%

"While GenAI is widely embraced by iGaming companies to enhance player personalisation—evidenced by over 60% of respondents using it for tailored promotions and automated content creation—it's crucial to remember that AI alone is not enough. GenAI needs human oversight to ensure that messages are not only accurate but also resonate on a truly personal level with each player. To fully leverage GenAI's potential to foster deep, meaningful connections, operators should engage with platforms and experts who understand the nuances of AI-driven marketing."

Pini Yakuel
CEO
Optimove

"I would say we use Gen AI for all of those reasons, especially chatbots. I think chatbots are an area AI can help massively with. We have used our chatbots to define our UX writing principles. We are feeding our standards, governance and guidance into the AI so it can help our designers and product people. Overall, there are so many things that can be done much faster and better by AI, machine learning and predictive analytics. The more you can start to trend and forecast the better, and machines are very good at that sort of stuff. But again, you need a human to then put that human lens to it."

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We asked respondents if their organisation uses personalisation to deliver recommended content in their marketing campaigns and if so, how. Here is what they told us:

"We look for high-engagement moments to recommend bets."

"Our marketing campaigns recommend games and bets by forecasting future trends in player preferences."

"Personalisation is used to predict the types of bets players find most appealing."

"We promote games that piques players interests using personalisation."

"We use personalisation to align content with player preferences and recent activity."

"Personalisation allows us to recommend games and bets that fit individual betting preferences."

"The survey respondents emphasise that personalisation in iGaming is only as effective as the data that powers it. Access to robust player data—historical, real-time, and predictive—is essential for AI-driven personalisation that truly resonates with players. By understanding preferences, recent activity, and even forecasting future interests, operators are delivering tailored recommendations and content that deepen engagement and elevate the player experience."

Motti Colman
VP Revenue, Gaming
Optimove

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Conclusion

The iGaming industry is in a transformative phase, driven by the widespread adoption of gamification and the integration of advanced technologies, particularly Generative AI. Gamification has emerged as a universal strategy, with 100% of respondent organisations implementing it to some degree. This unanimous adoption underscores the recognised potential of gamification in enhancing player lifetime value and overall gaming experiences.

The industry's approach to gamification is diverse and comprehensive, with elements such as achievements, tournaments, personalised challenges, and quests all proving effective. This multi-faceted implementation suggests that a broad gamification strategy is key to catering to varied player preferences. Player data has proven to be the cornerstone of effective gamification and personalisation strategies. Organisations are harnessing this data to create highly personalised experiences, from tailoring odds and game paces to recommending games based on individual betting styles.
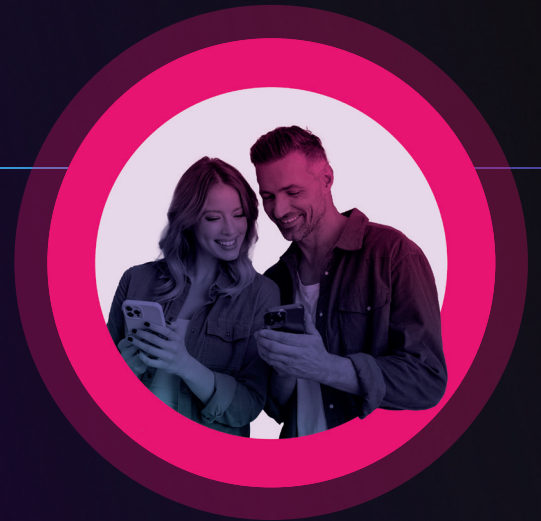
The rise of Gen AI marks another pivotal shift in the iGaming landscape. With 61% of respondents having already deployed AI solutions for player personalisation and the remaining 39% planning to do so, it is clear that AI is fundamental to future iGaming operations. The focus on using AI for personalised promotions, automated content creation, and predictive analytics highlights its potential to enhance customer experiences and streamline operations.

As the industry collects more data than ever before, the opportunity to tailor betting experiences to each player grows exponentially. However, this also presents challenges in data analytics and responsible use of player information. Organisations that can effectively integrate gamification, leverage player data, and harness the power of AI will likely emerge as leaders in this new era of iGaming. The iGaming industry is at the cusp of a new age characterised by hyper-personalisation, AI-driven innovations, and immersive gaming experiences.

Key Suggestions

Game. Set. Bet

iGaming organisations understand the value of gamification, and the impact it can have on player experience. Continue these efforts by diversifying your gamification offerings. Players have a wealth of choices in every area of their lives, and they expect the same when they are gambling. iGaming organisations will have to match this demand moving forward.

Personal'AI'sation

With 100% of respondents either having deployed Gen AI solutions to enhance player personalisation or planning to, the industry clearly recognises the technology's potential. By analysing vast amounts of data, Gen AI solutions can elevate your personalisation efforts through personalised promotions, automated content creation and predictive analytics. Continue these efforts by refining solutions and getting your data analytics in order.

Data is Your Ally

Enhance your gamification strategy by leveraging player data. From understanding what time of day players are engaging with various games to knowing when and how often to suggest new ones, player data allows you to hone your gamification offerings and deliver a truly personalised experience for your players.

Content is King

As content consumption continues to rise, players expect increasingly personalised and engaging experiences. iGaming organisations must adapt to these evolving demands by delivering recommended content that resonates with each individual player. By tracking betting habits and gaining a deeper understanding of player preferences, organisations can create more refined customer segments and deliver highly targeted content.

About

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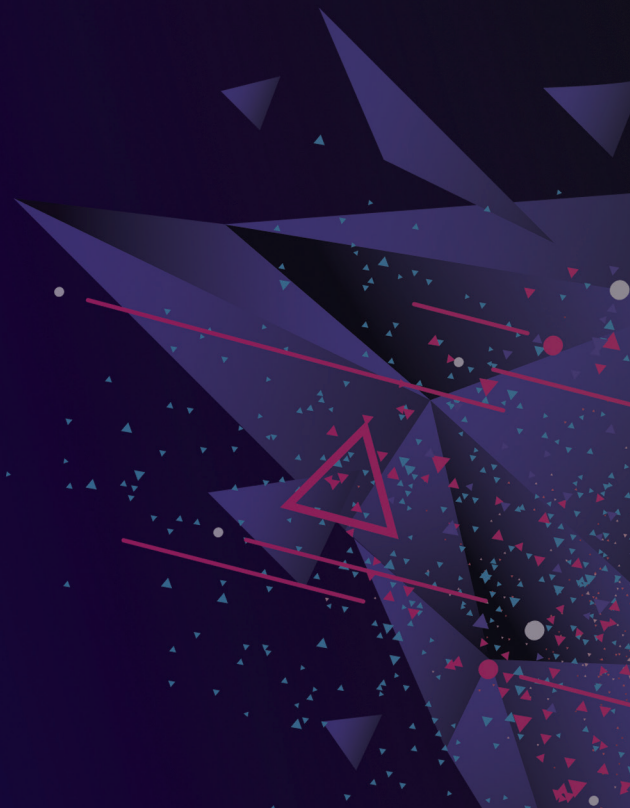
Optimove is the first Customer-Led Marketing Platform and the #1 CRM Marketing Solution for iGaming and Sports Betting. Its solutions ensure that marketing always starts with the customer instead of a campaign or product. Customer-led marketing has been proven to deliver brands an average increase of 33% in customer lifetime value.

It is the only customer-led marketing platform powered by the combination of 1) rich historical, real-time, and predictive customer data, 2) AI-led multichannel journey orchestration, and 3) statistically credible multitouch attribution of every marketing action.

Optimove was recognized as the Visionary Leader in Gartner's 2024 Magic Quadrant for Multichannel Marketing Hubs. Optimove continues as a global leader for journey orchestration, as acknowledged in Gartner's companion Critical Capabilities report. Optimove provides industry-specific and use-case solutions for leading consumer brands globally.

For more information, go to: **www.optimove.com**

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