



India: Mobile Game Market Insights **2025**



Sensor Tower

Introduction/Overview

Sensor Tower is the leading source of mobile app, digital advertising, retail media, and audience insights for the largest brands and app publishers across the globe.

With a mission to measure the world's digital economy, Sensor Tower's award-winning platform delivers unmatched visibility into the mobile app and digital ecosystem, empowering organizations to stay ahead of changing market dynamics and make informed, strategic decisions.

Founded in 2013, Sensor Tower's mobile app insights have helped marketers, app, and game developers demystify the mobile app landscape with visibility into usage, engagement, and paid acquisition strategies. Today, Sensor Tower's digital market insights platform has expanded to include Audience, Retail Media, and Pathmatics Digital Advertising Insights, helping brands and advertisers understand their competitor's advertising strategies and audiences across web, social, and mobile.

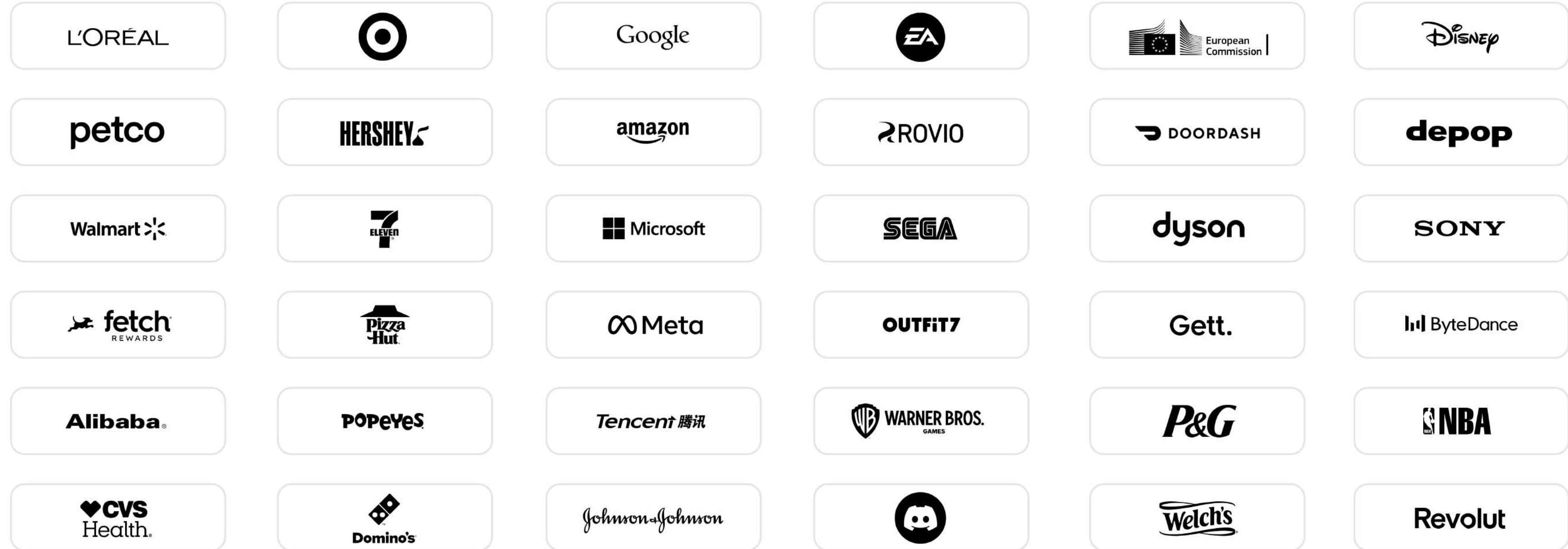


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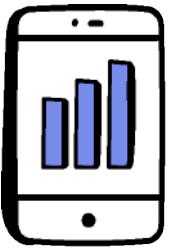
Sensor Tower | Our Customers

Top publishers trust Sensor Tower insights to grow their business.



Note: Top publishers by app store revenue | Source: Sensor Tower

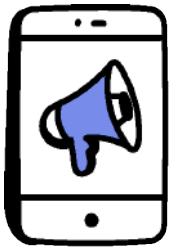
Sensor Tower Solutions



Sensor Tower **App Performance Insights**

For those who need visibility into the mobile app ecosystem.

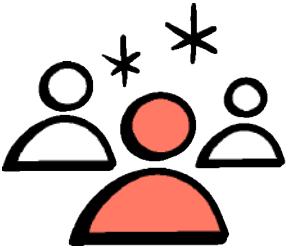
Enjoy insight into: app rankings, downloads, and revenue; active users, demographics, retention, sessions, and time spent; app ratings and reviews, keywords, search ads, and more.



Sensor Tower **App Advertising Insights**

For those who need visibility into paid user acquisition strategies.

Enjoy insight into: global and regional share of voice (SOV) across apps and the biggest mobile app ad networks, top advertisers, publishers, creatives, and more.



Sensor Tower **Audience Insights**

For those who need visibility into your existing, competitor, and potential new audiences.

Enjoy insight into: which apps consumers are actually interacting with (app engagement) AND which ads they're seeing (ad exposure).

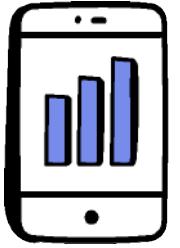


Sensor Tower **Pathmatics Digital Advertising Insights**

For those who need visibility into the digital ad ecosystem.

Gain insight into: ads served, spend and impression estimates, SOV, and more across key channels, like: Facebook, Instagram, X (formerly Twitter), OTT, YouTube, display, video, and others.

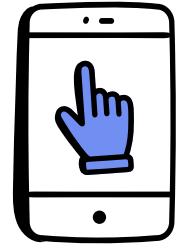
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Sensor Tower **Gaming Insights**

For those who need the deepest look into the mobile gaming ecosystem.

Enjoy insight into: downloads, revenue, RPD, and ARPDAU beyond the top-level category (Lifestyle & Puzzle) and can drill deeper into genres (Puzzle, Arcade, etc.) and sub-genres (Swap, Word, etc.).



Sensor Tower **Advanced Usage Insights**

For those who need the deepest look into app user engagement.

Enjoy insight into: sessions per user; time spent; time of day; days used per time period; new, retained, resurrected, and churned user trends; and cohort usage overlap.



Sensor Tower **Pathmatics Retail Media Insights**

For those who need industry-first insight into on- and off-site retail media network investments

Enjoy insight into: ad spend, media mix, share of wallet, impressions, and SOV for brands and products across retailers – gaining a coveted view into the co-branded digital ad ecosystem and retail media networks.

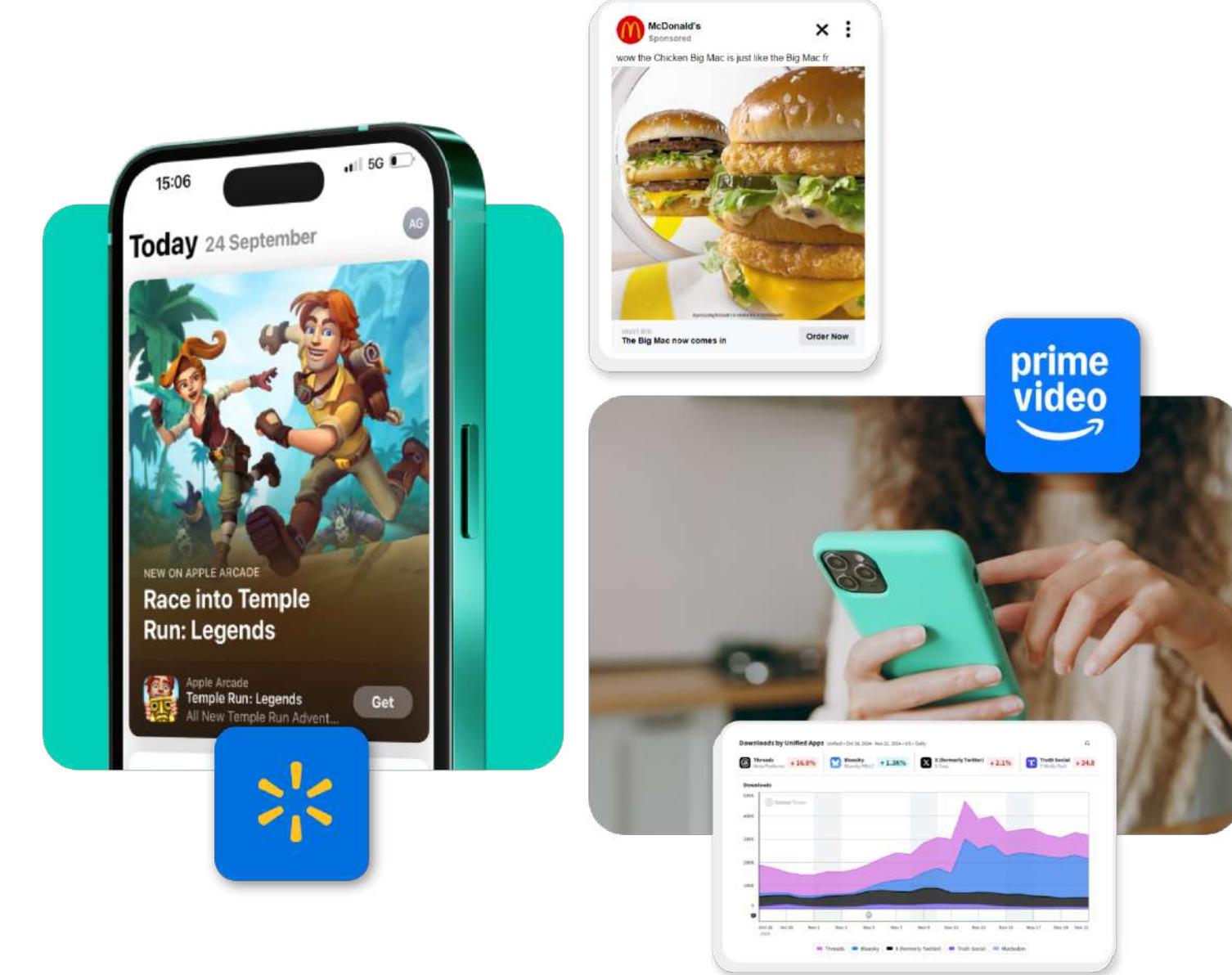
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Executive Summary

This report provides an in-depth analysis of the App Store and Google Play mobile game markets in India in 2025, covering the overall revenue and download trends in these markets, revenue shares and trends across top game genres, download and revenue changes across different countries, as well as top mobile games by revenue and downloads. Featuring a case study on *Ludo King*, this report also helps you understand how leading games successfully cultivate long-standing engagement within the Indian gaming market.

Clarification on Revenue and Downloads Data

Sensor Tower's revenue figures are derived from estimated in-app purchase (IAP) revenue on the App Store and Google Play, excluding ad revenue, revenue from third-party Android app-store sales, and direct payment revenue from developers' websites and other channels. Unless explicitly stated as net revenue, the revenue figures shown represent gross revenue (before platform deduction). Sensor Tower's downloads figures are derived from estimated downloads on the App Store and Google Play, excluding pre-installs, duplicate downloads, and downloads from third-party Android app-store. Google Play is not available in Mainland China.



Sensor Tower

Data & Methodology

Sensor Tower's **Pathmatics** empowers you to uncover insights into the digital advertising ecosystem, minimize ineffective ad spend, and enhance the precision of your advertising campaigns. With Pathmatics, you gain visibility into the digital advertising landscapes across markets including the United States, Australia, Brazil, Canada, France, Germany, Italy, Japan, Mexico, New Zealand, Spain, and the United Kingdom. Pathmatics provides comprehensive estimates on ad placements, spending, impressions, and share of voice (SOV), as well as in-depth analysis of brands' advertising strategies on platforms like Facebook, Instagram, X (formerly Twitter), YouTube, and TikTok, across formats such as display banners, videos, mobile, and OTT.

Pathmatics collects digital ad samples from the web and utilizes statistical sampling methods to estimate the impressions, cost-per-thousand impressions (CPM), and expenditure associated with each creative.

	Digital Advertising Channels Supported by Pathmatics Across Markets												
	United States	United Kingdom	Canada	Australia	New Zealand	Germany	Spain	Italy	France	Brazil	Mexico	Japan	South Korea
Facebook	•	•	•	•	•	•	•	•	•	•	•	•	•
Instagram	•	•	•	•	•	•	•	•	•	•	•	•	•
YouTube	•	•	•	•	•	•		•	•		•	•	•
TikTok	•	•	•	•		•	•	•	•	•	•	•	•
Snapchat	•	•	•	•		•	•	•	•				
X	•	•											•
LinkedIn	•	•	•			•							
Pinterest	•	•	•			•		•	•				
Reddit	•	•	•	•		•		•	•				
OTT	•												
Desktop Video	•	•	•	•	•	•							
Desktop Display	•	•	•	•	•	•							
Mobile Video	•	•	•	•	•	•							
Mobile Display	•	•	•	•	•	•							

Agenda

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Overview of India Mobile Game Market

India is the World's and Asia's Biggest Mobile Game Market with 8.45 Billion Downloads in FY 2024-25

In FY 2024-25, India cements its status as both Asia's and the world's largest mobile game market, reaching 8.45 billion downloads—more than double Indonesia's 3.34 billion. This surge is fueled by affordable data, widespread smartphone use, and a cultural embrace of mobile gaming as social entertainment.

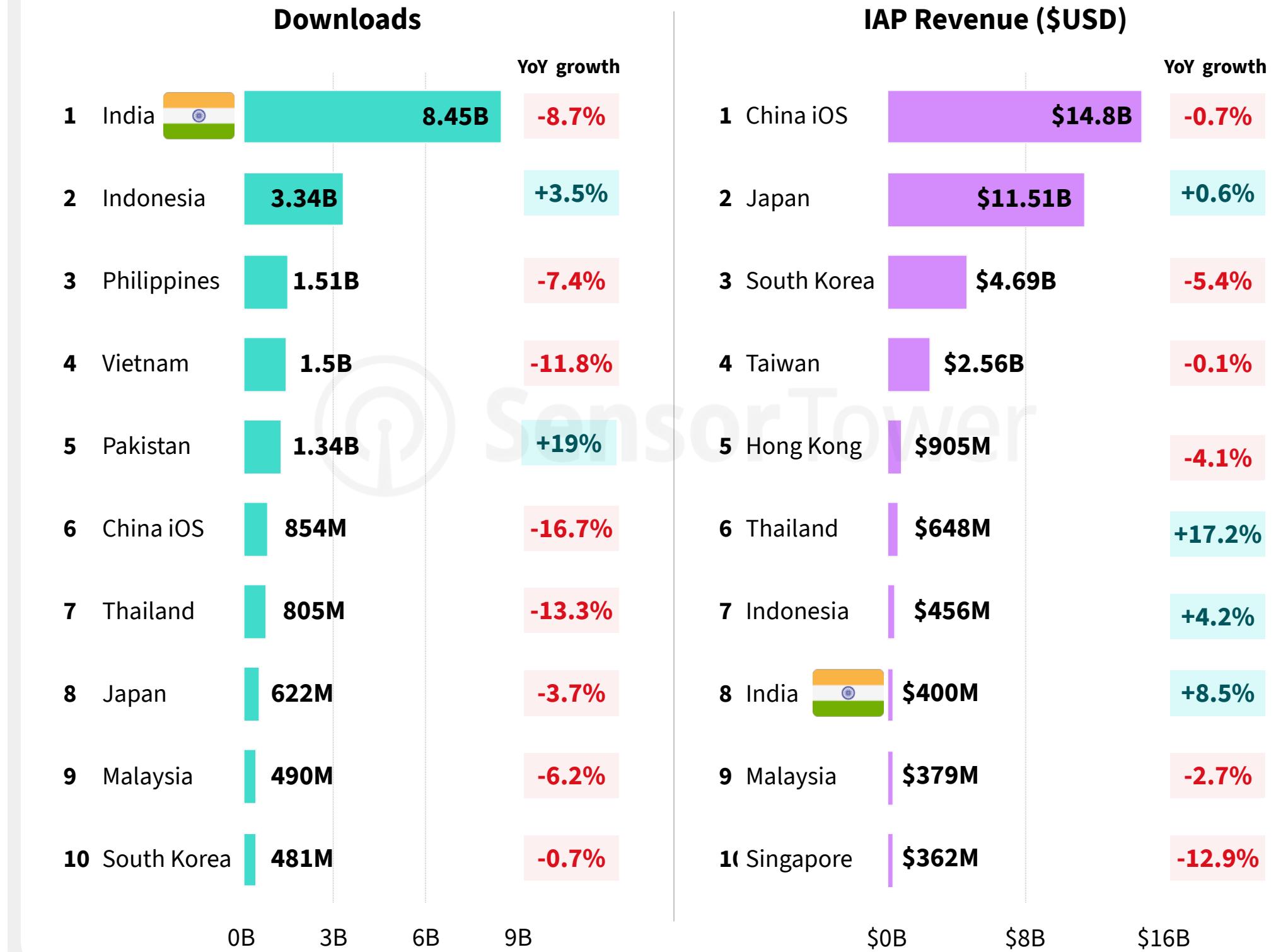
Yet, despite this massive volume, India's mobile gaming revenue remains at just around \$400 million, highlighting ongoing monetization challenges. With most players favoring free-to-play, publishers must adapt strategies to unlock revenue potential in this huge, but cost-sensitive, market.

Data Source: Sensor Tower App Performance Insights as of June 10, 2025. The Financial Year (FY) in India runs from April 1 to March 31 of the subsequent year.

Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. iOS Only for China. Revenue is gross — inclusive of any percent taken by the app stores.

Top Mobile Game Markets in Asia

April 2024 - March 2025



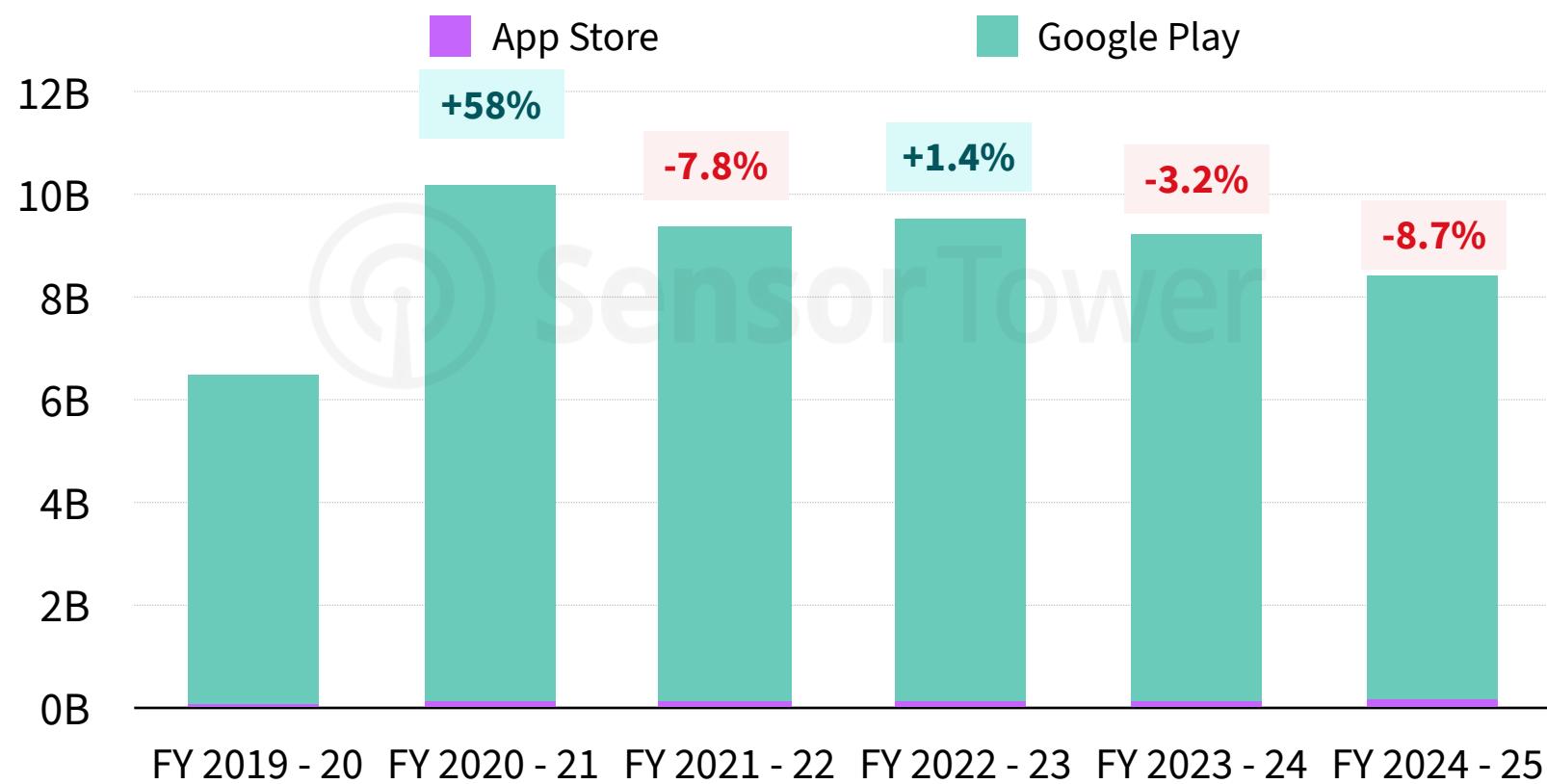
India's Mobile Game Market FY 2024-25: Stable Post Pandemic Downloads and Surging In-App Purchases Highlight Monetization Growth Potential

Data Source: Sensor Tower App Performance Insights as of June 10, 2025. The Financial Year (FY) in India runs from April 1 to March 31 of the subsequent year.

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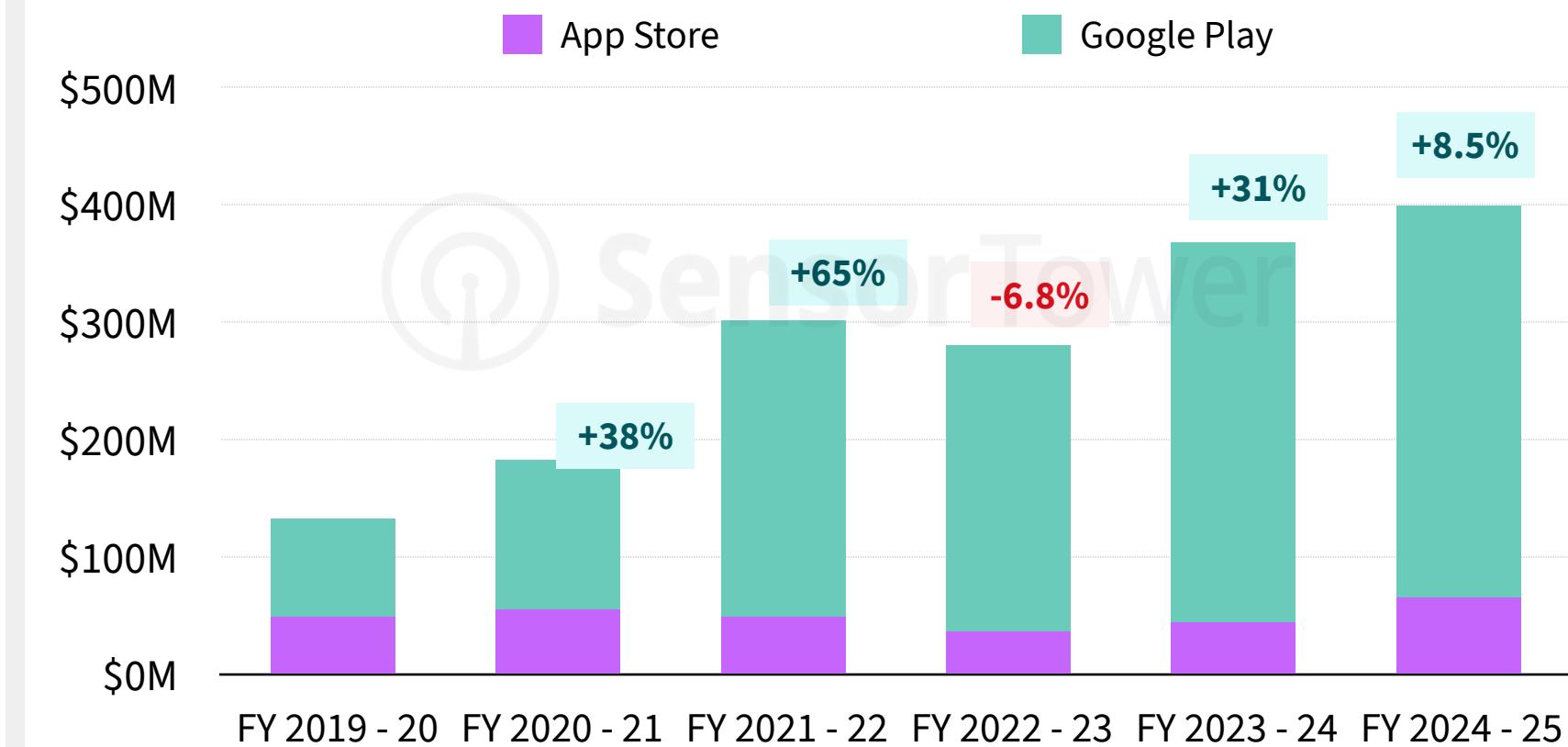
Mobile Game Downloads Trends in India

FY 2019 - 20 to FY 2024 - 25



Mobile Game IAP Revenue in India

FY 2019 - 20 to FY 2024 - 25



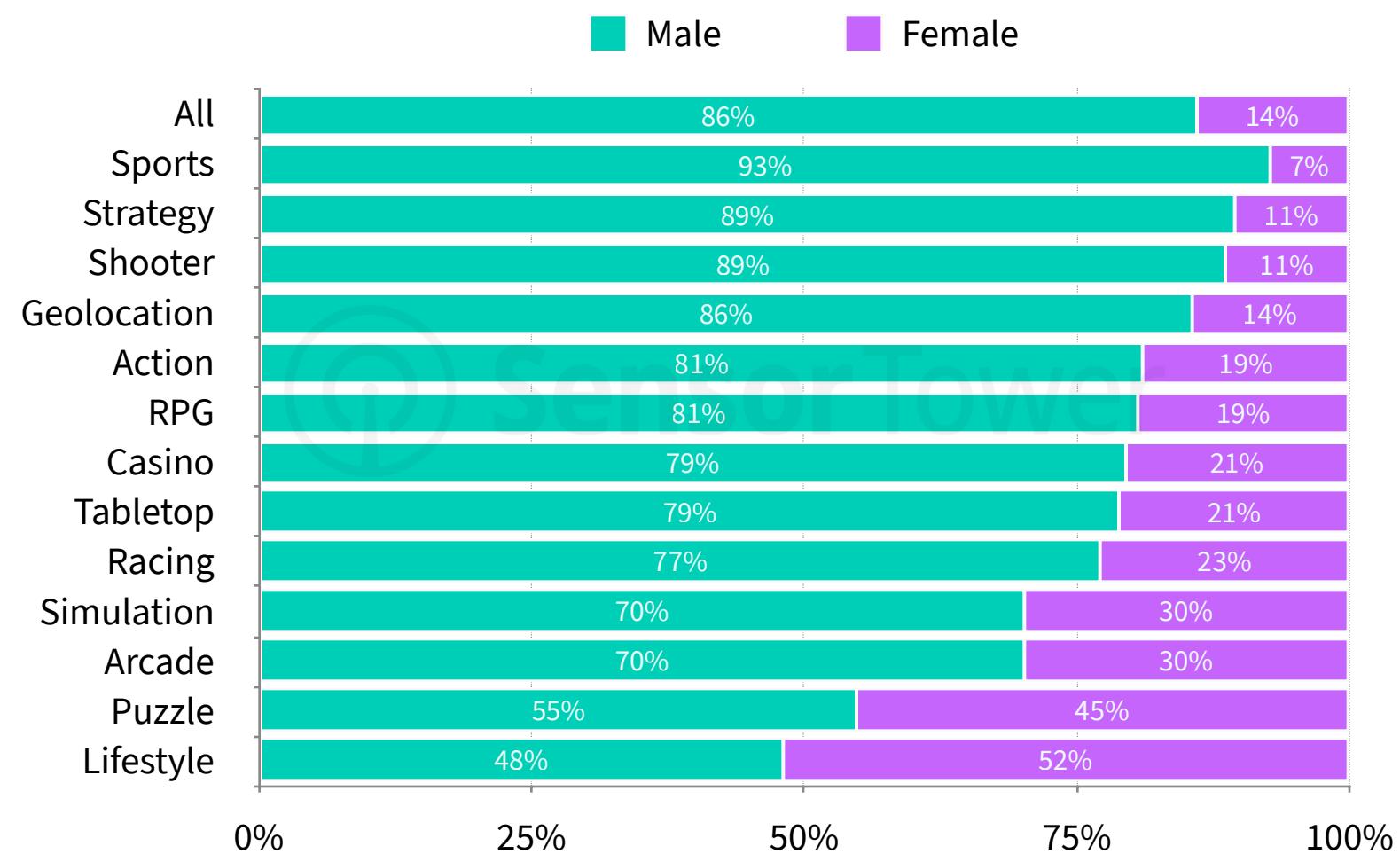
In FY 2024-2025, India's mobile game download trends remain steady, sustaining momentum from the pandemic's boost to mobile gaming. Google Play captures the majority share due to its affordability, while iOS, though smaller, maintains an influential slice of higher-value spenders who are key to driving monetization growth.

India's IAP revenue now exceeds \$400 million, highlighting growing player investment and digital payment adoption. Despite lower spending than mature Asian markets, India's evolving monetization landscape shows promise, with iOS players driving per-user revenue even as free-to-play models prevail.

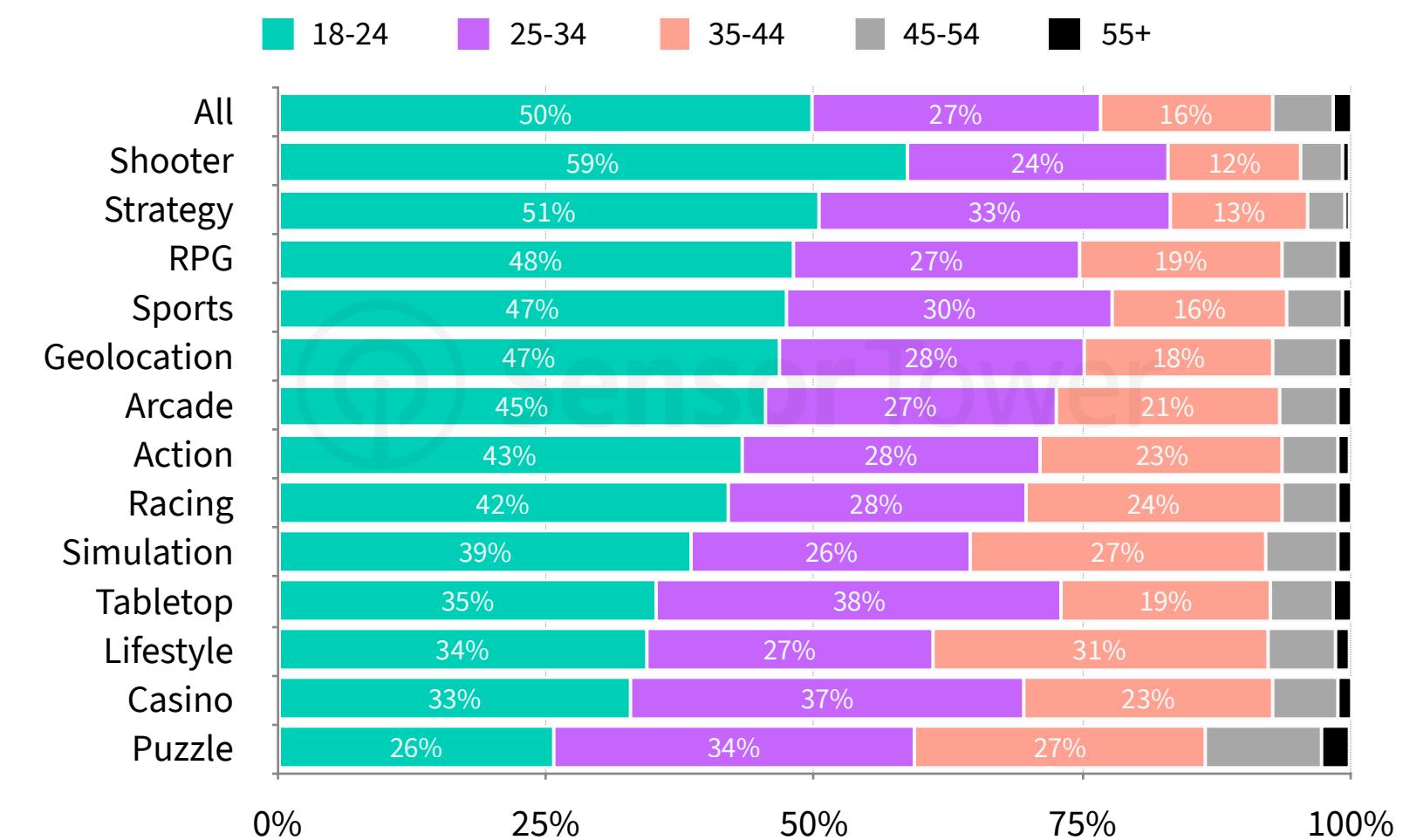
India's Gamer Demographics: Younger, Male Audiences Lead, But Niches Emerge Across Age & Gender

Data Source: Sensor Tower Audience Insights. Games classified by Sensor Tower's Game Taxonomy as of June 10, 2025.

Gaming app gender group percentage India FY 2024 - 25



Gaming app age group percentage India FY 2024 - 25



India's mobile gaming market skews young, with **77% of players aged 18-34**, and predominantly **male, comprising 86%** of all gamers. Core genres like Sports and Shooter see the highest male concentration at around 90%, while Lifestyle games uniquely boast a 52% female audience. Though the 18-24 cohort leads most genres, particularly competitive titles, Puzzle, Tabletop, and Casino games also attract significant engagement from older players aged 25 and above.



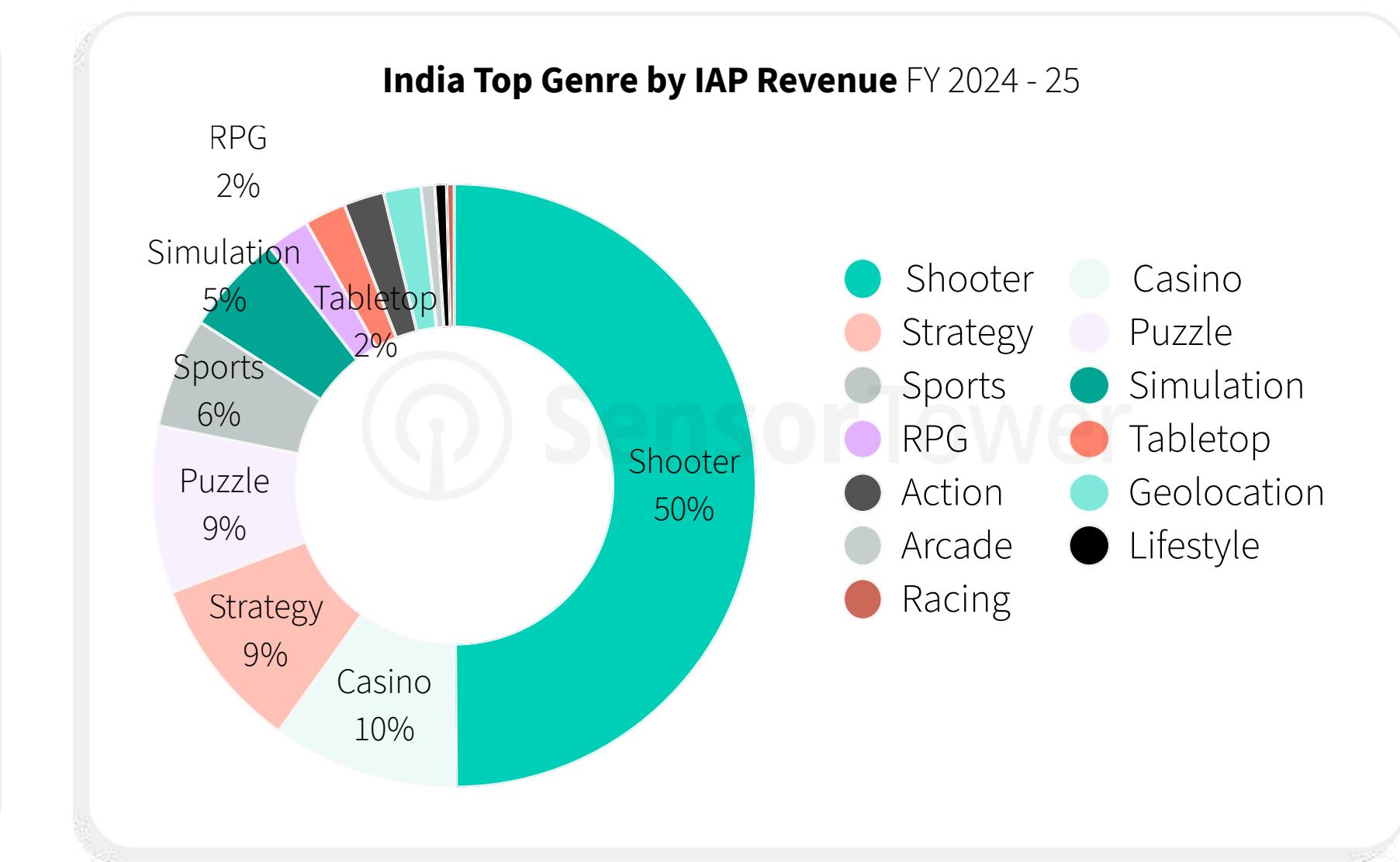
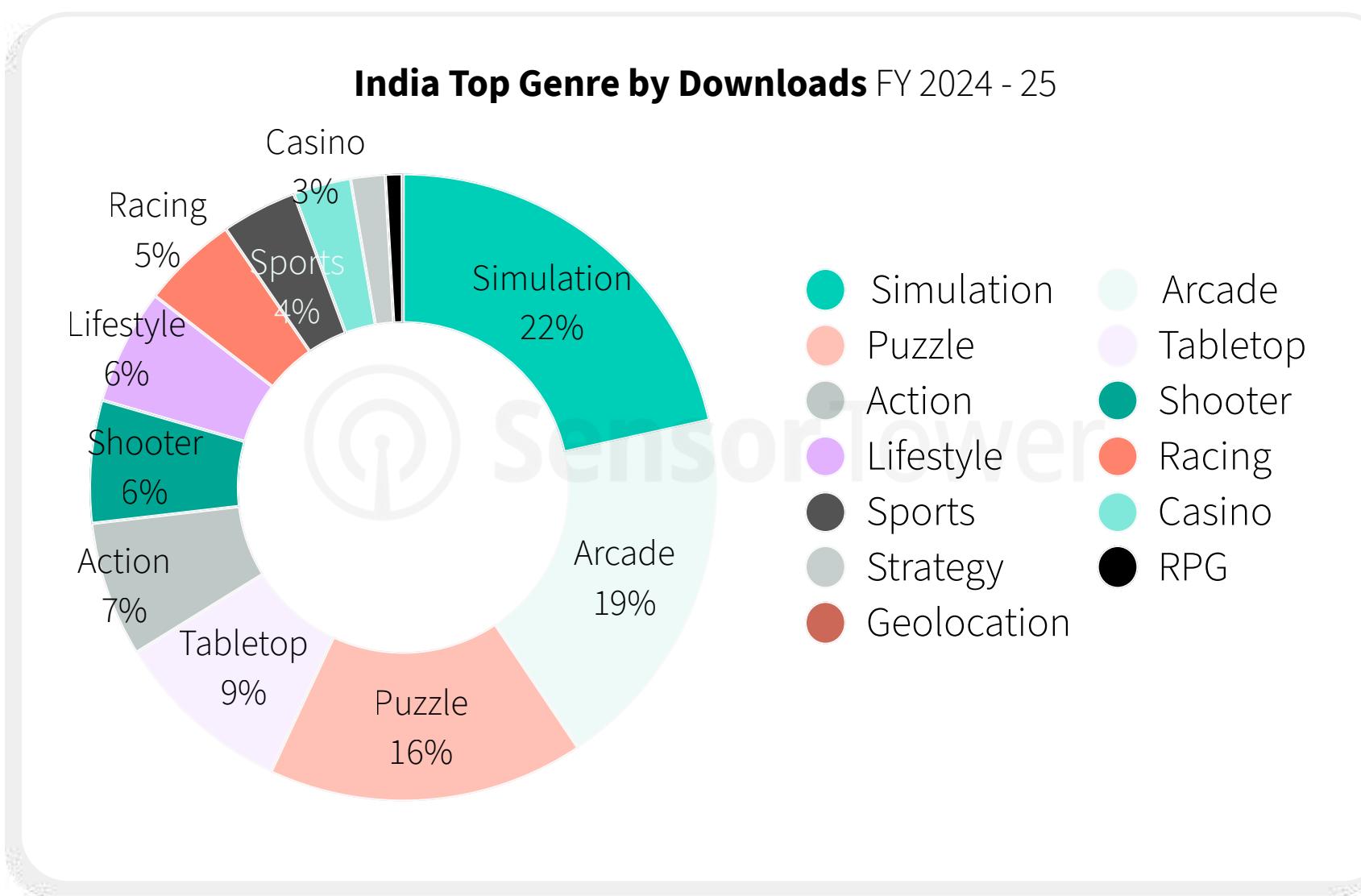
India Country Deep-Dive

Top Genres and Games

India's Top Genres: Tabletop Games Lead Downloads, Shooter and Strategy Dominate Revenue

Data Source: Sensor Tower App Performance Insights as of June 10, 2025. The Financial Year (FY) in India runs from April 1 to March 31 of the subsequent year.

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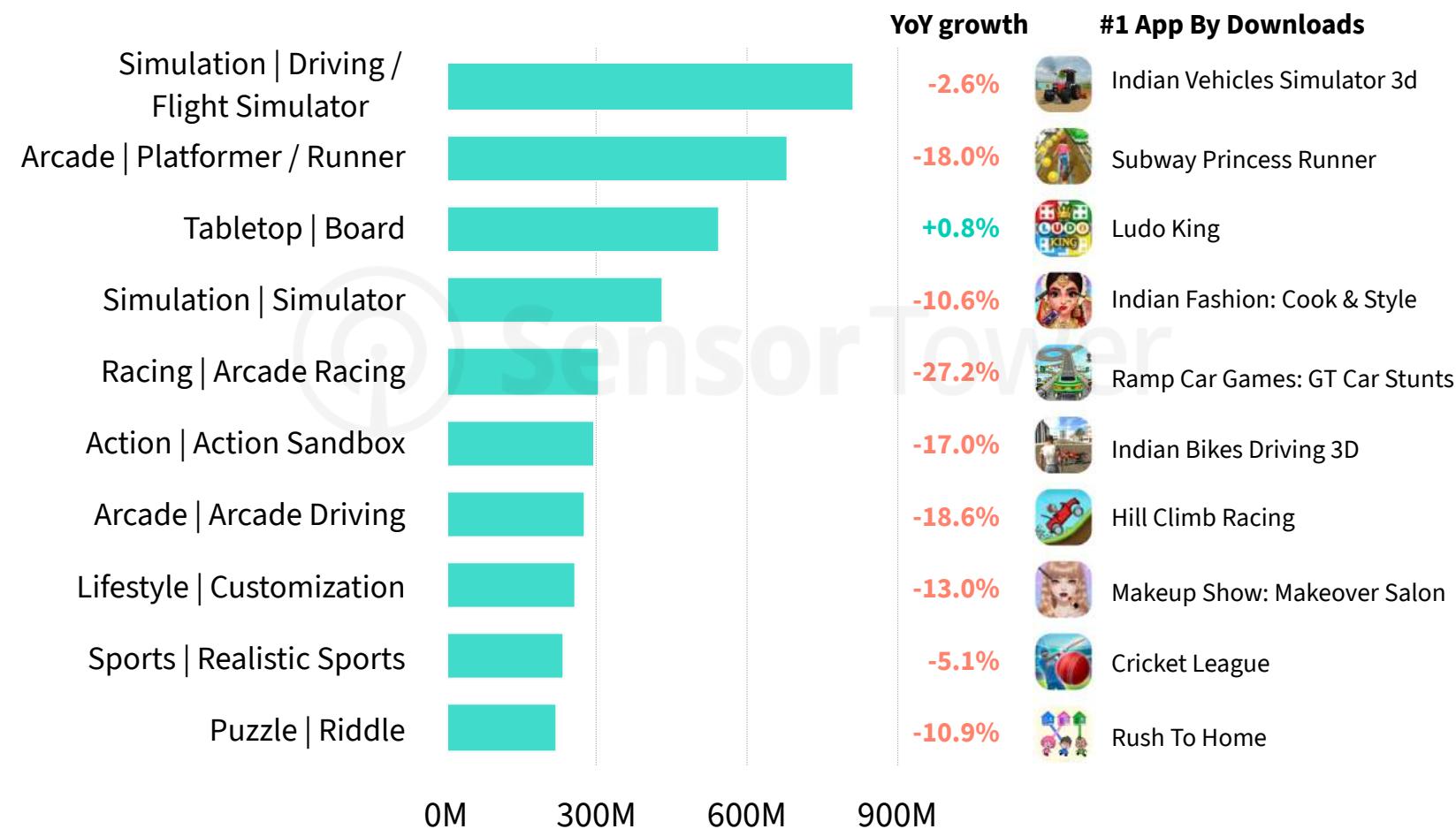
In India, genres like **Simulation**, **Arcade**, **Puzzle**, and culturally resonant **Tabletop** board games attract huge download volumes thanks to their simple, familiar gameplay that resonates with India's family-oriented gaming culture. In contrast, IAP revenue is driven by more competitive genres—**Shooter**, **Casino** and **Strategy**—where deep engagement, strategic depth, and social features sustain spending. For publishers, this underscores the need to balance the mass-market appeal of casual games with deeper monetization strategies that cater to India's growing segment of high-value, competitive gamers.

India's Top Subgenres: Driving Simulator and Platformer Lead Downloads, While Battle Royale, Realistic Sports and 4x Strategy Fuel Revenue Growth

Data Source: Sensor Tower App Performance Insights as of June 10, 2025. The Financial Year (FY) in India runs from April 1 to March 31 of the subsequent year.

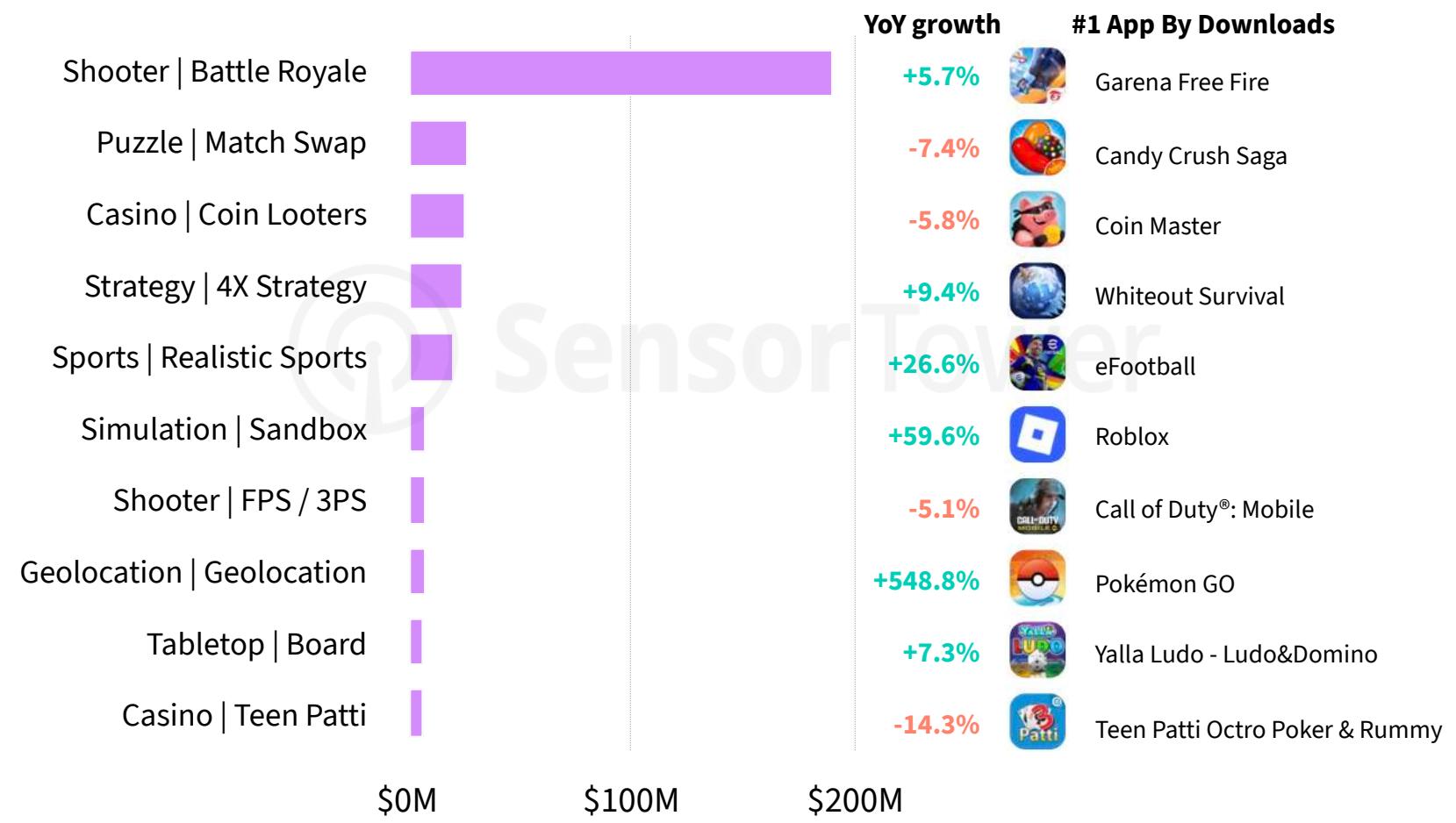
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India Top Subgenre by Downloads FY 2024 - 25



Downloads in India remain dominated by Simulation (Driving/Flight Simulator) and Arcade (Platformer/Runner) subgenres, reflecting the local preference for accessible, easy-to-play games. Tabletop Board games also hold strong, with *Ludo King* maintaining its popularity.

India Top Subgenre by IAP Revenue FY 2024 - 25



Shooter (Battle Royale) leads, commanding a major share of revenue, while other high-spend subgenres like Realistic Sports and Strategy (4X) also thrive. Notably, games like *eFootball* and *Whiteout Survival* are driving this revenue surge, reflecting India's evolving monetization landscape and player engagement.

India's Winning Hand: Culturally-Rooted Games Dominate the Download Charts

India's download charts in FY 2024-25 were led by Gametion's *Ludo King*, affirming the dominance of localized tabletop games. Garena's shooter *Free Fire* held strong at #2, while other top performers included sports *Dream 11* and *Cricket League*, showcasing a diverse market that blends traditional pastimes with popular core genres.

The download growth chart revealed a dynamic market where Tictok Skill Games' *WinZO Ludo* was the breakout star, catapulting 390 places to the top. Hyper-casual titles also showed massive momentum, with *Pizza Ready!* and *Wood Screw Puzzle* surging up the ranks, signaling gamers' strong appetite for new viral content.

Data Source: Sensor Tower App Performance Insights as of June 10, 2025. The Financial Year (FY) in India runs from April 1 to March 31 of the subsequent year.

Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. Revenue is gross — inclusive of any percent taken by the app stores.

FY 2024 - 25 India Top 10 Mobile Games Unified • Apr 1, 2024 - Mar 31, 2025

Downloads

vs FY 2023-24

1	 Ludo King	Gametion	Tabletop Board	=
2	 Free Fire	Garena Games Online	Shooter Battle Royale	▲
3	 Zupee: Ludo Multiplayer Games	Zupee: Ludo Online Games	Tabletop Board	▲ 2
4	 Dream11	DREAM11 FANTASY	Sports Fantasy Sports	▼
5	 Indian Bikes Driving 3D	Rohit Gaming Studio	Action Action Sandbox	▼
6	 Cricket League	Miniclip.com	Sports Realistic Sports	▲
7	 WinZO Ludo: Play Ludo	Tictok Skill Games	Tabletop Board	▲ 90
8	 Subway Princess Runner	Ivy Mobile	Arcade Platformer / Runner	▼
9	 Carrom Pool: Disc Game	Miniclip.com	Tabletop Board	▼
10	 Pizza Ready!	Supercent	Simulation Time Management	▲ 18

Downloads Growth

vs FY 2023-24

1	 WinZO Ludo: Play Ludo Online	Tictok Skill Games	Tabletop Board	▲ 390
2	 Free Fire	Garena Games Online	Shooter Battle Royale	▲ 2
3	 Pizza Ready!	Supercent	Simulation Time Management	▲ 118
4	 Zupee: Ludo Multiplayer Games	Zupee: Ludo Online Games	Tabletop Board	▲ 12
5	 Prison Survival: Tap Challenge	HIGAME GLOBAL	Arcade Other Arcade	NEW
6	 Real Bus Simulator : Bus Games	Solo Studio	Simulation Driving / Flight Simulator	▲
7	 Wood Screw Puzzle	iKame	Puzzle Physics	▲ 429
8	 Tic Tac Toe 2 Player: XO Game	Onetap Global	Puzzle Other Puzzle	▲ 579
9	 456 Run Challenge: Clash 3D	AMOBEAR TECHNOLOGY GROUP	Action Asymmetric Battle	▲ 499
10	 Rush: Ludo, Carrom Game Online	Hike Private	Tabletop Board	▲ 22

Core Games Reign: Shooters and Strategy Dominate India's Mobile Revenue Landscape

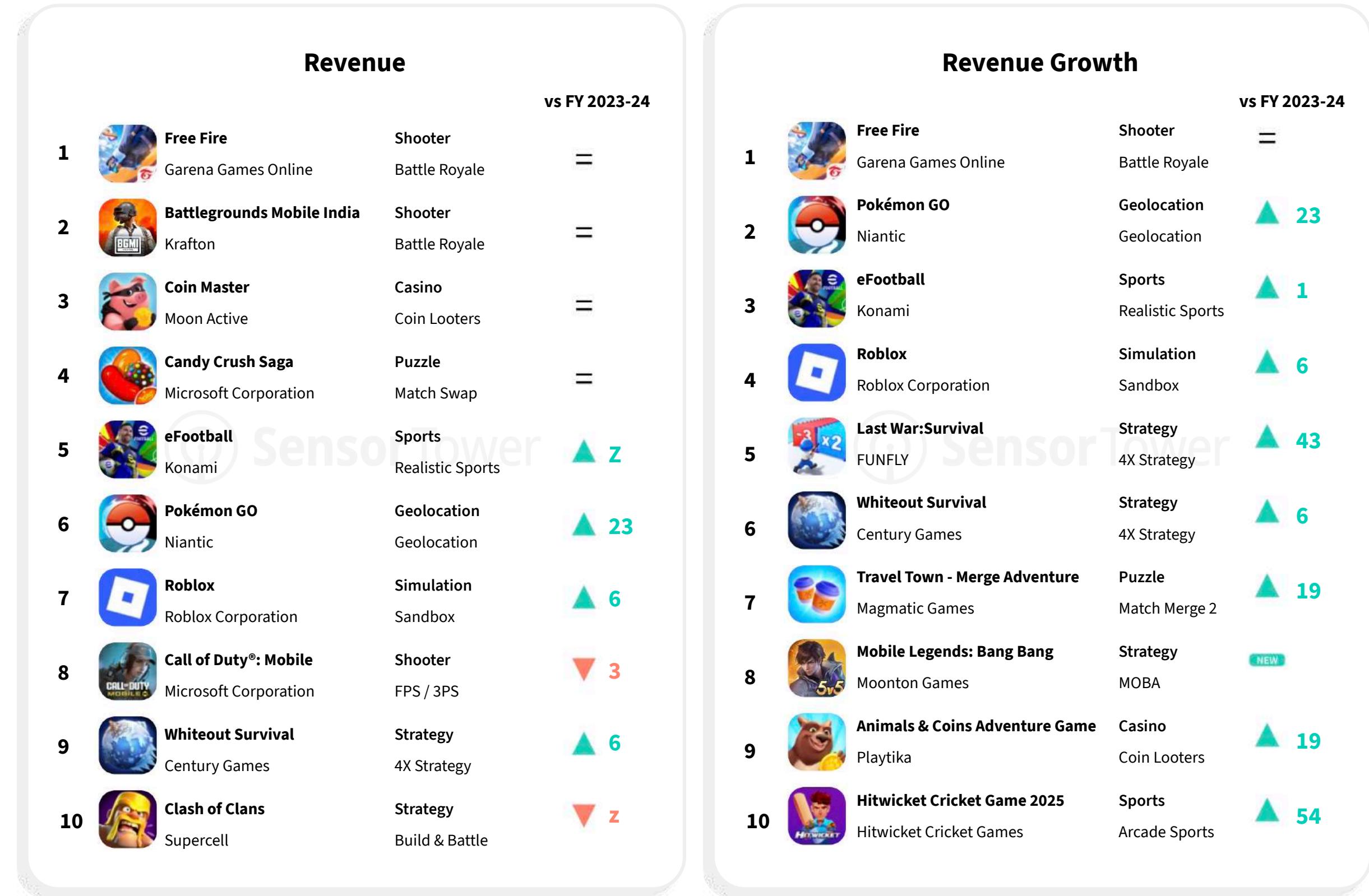
India's revenue landscape is dominated by core games, with Battle Royales *Garena Free Fire* and *Battlegrounds Mobile India (PUBG MOBILE)* leading the charts. Global hits like *Coin Master* and *Clash of Clans* also rank high, proving that long-term player engagement and effective monetization are the primary drivers of revenue.

The revenue growth chart confirms the strength of core games, as *Free Fire* also tops this list. Established titles like *Pokémon GO* and *Roblox* showed remarkable resurgence, while newer strategy games like *Last War:Survival* made significant gains, signaling strong spending potential in immersive genres.

Data Source: Sensor Tower App Performance Insights as of June 10, 2025. The Financial Year (FY) in India runs from April 1 to March 31 of the subsequent year.

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FY 2024 - 25 India Top 10 Mobile Games Unified • Apr 1, 2024 - Mar 31, 2025



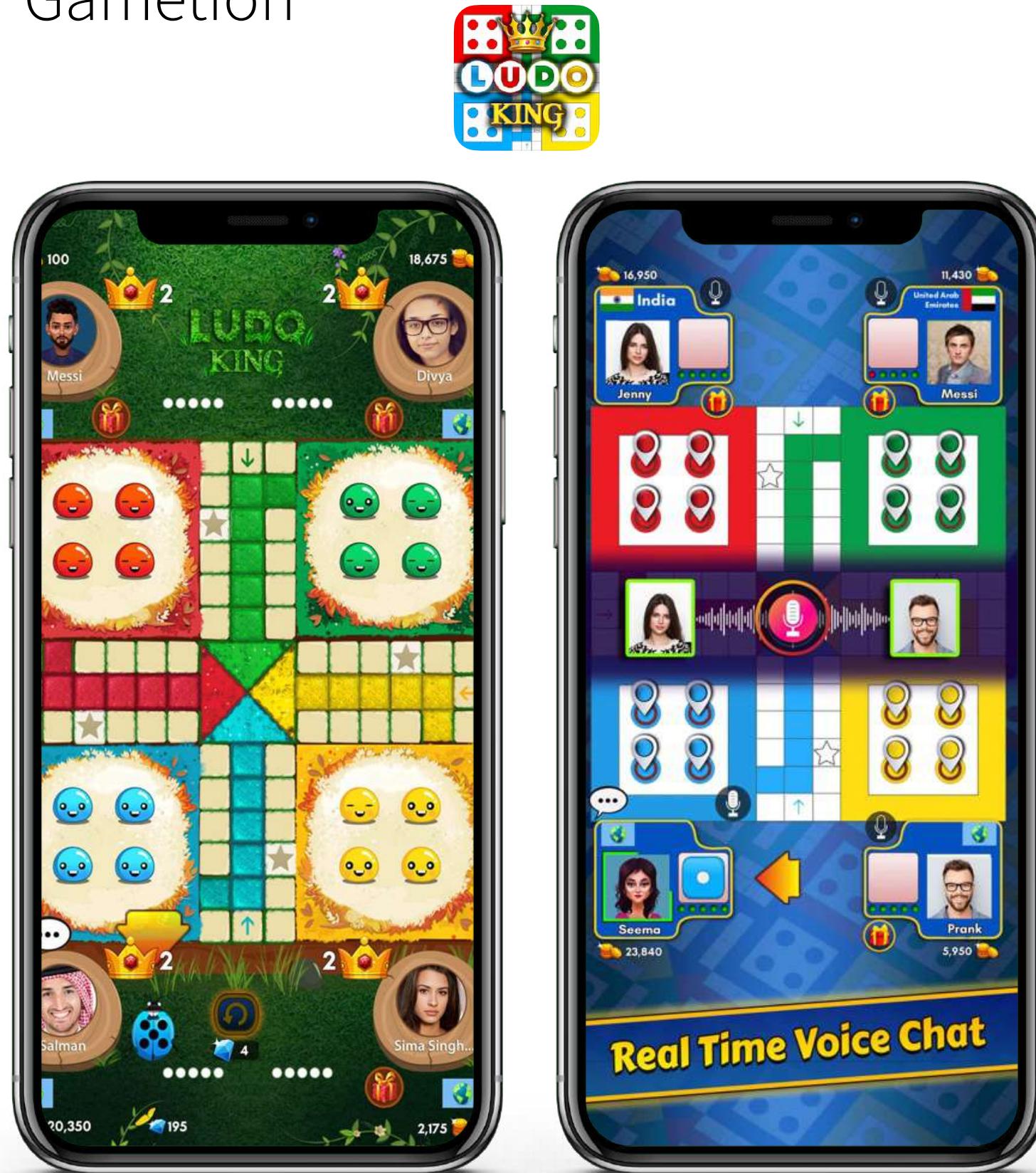


Case Study

Ludo King

Ludo King

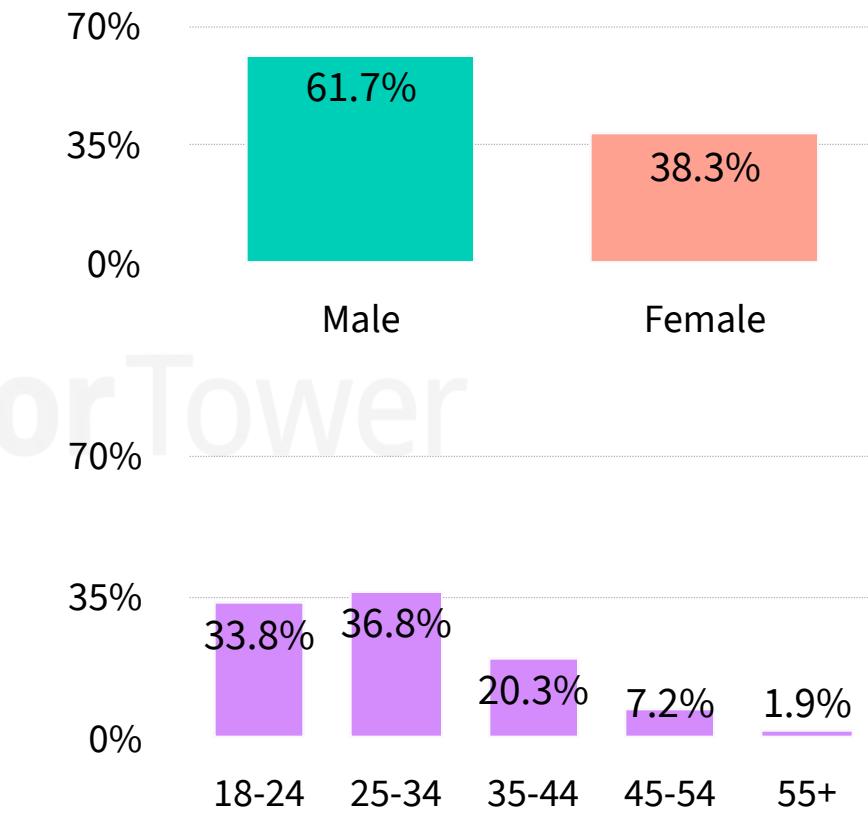
Gametion



Game Overview

Release Date	February 2016
Genre	Tabletop
Sub-Genre	Board
Product Model	Casual
Setting	Tabletop
Theme	Flat
Art Style	Top-Down
Camera POV	
Monetization	Free to Play , Live Ops , Season Pass , Ad Removal , Ads , Currency Bundles
Game Tags	Co-op , External Stores , Multi-platform , PvP , Social Gambling

Gender & Age India, Q1 2025



Data Source: Sensor Tower App Performance and Audience Insights

Ludo King, India's #1 mobile game since 2017, was launched in December 2016 by Gametion Technologies, quickly becoming a gaming phenomenon. Its consistent top ranking stems from digitizing a cherished traditional board game and incorporating intuitive multiplayer modes, family-friendly design, and nostalgic elements.

Demographically, over 70% of its players are aged 18-34, primarily attracting young adults. The audience skews male (61.7%) but maintains significant female engagement (38.3%), highlighting its broad, inclusive appeal.

Ludo King remains India's Most Downloaded Mobile Game, Surpassing 1.25 Billion All-Time Downloads, with Monthly Downloads Still Growing Over Time

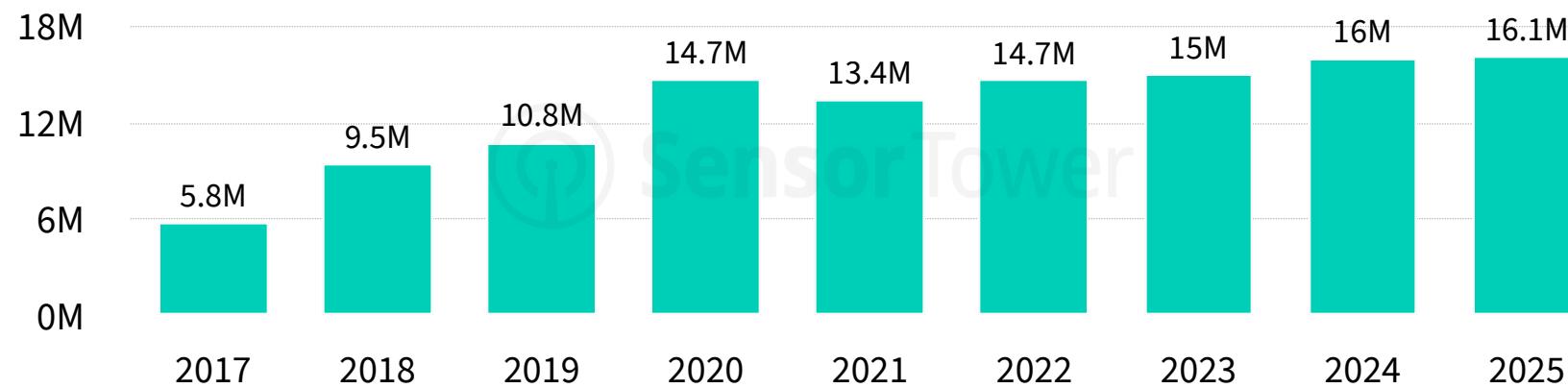
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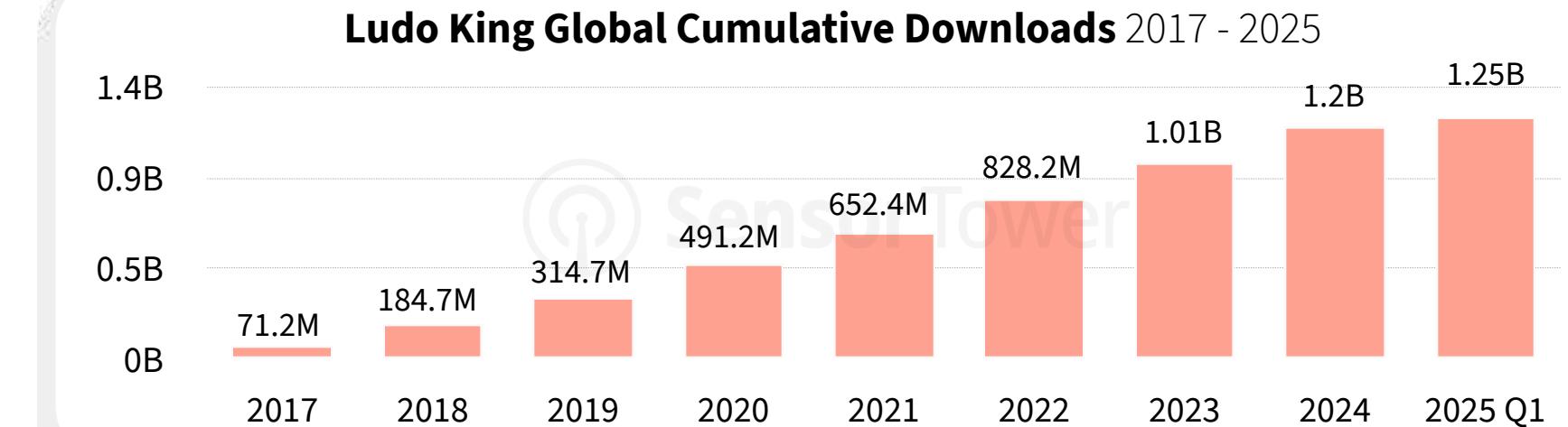
India Top Games by Downloads (2017 - Q1 2025)

#	2017	2018	2019	2020	2021	2022	2023	2024	2025 Q1
1	Ludo King	Ludo King	Ludo King	Ludo King	Ludo King	Ludo King	Ludo King	Ludo King	Ludo King
2	Subway Surfers	Subway Surfers	PUBG MOBILE	Hunter Assassin	Carrom Pool: Disc Game	Garena Free Fire	Dream11	Garena Free Fire	Garena Free Fire
3	Candy Crush Saga	Temple Run 2: Endless Escape	Garena Free Fire	Carrom Pool: Disc Game	Garena Free Fire	Carrom Pool: Disc Game	Indian Bikes Driving 3D	Zupee: Ludo Multiplayer	Dream11
4	Temple Run 2: Endless Escape	Candy Crush Saga	Carrom Pool: Disc Game	Garena Free Fire	Candy Crush Saga	Candy Crush Saga	Garena Free Fire	Indian Bikes Driving 3D	Zupee: Ludo Multiplayer Games
5	My Talking Tom	Dr. Driving	Subway Surfers	Among Us	Subway Princess Runner	Bubble Shooter - Pop Bubbles	Carrom Pool: Disc Game	Subway Princess	Cricket League

Ludo King Global Average Monthly Downloads 2017 - 2025



Ludo King Global Cumulative Downloads 2017 - 2025

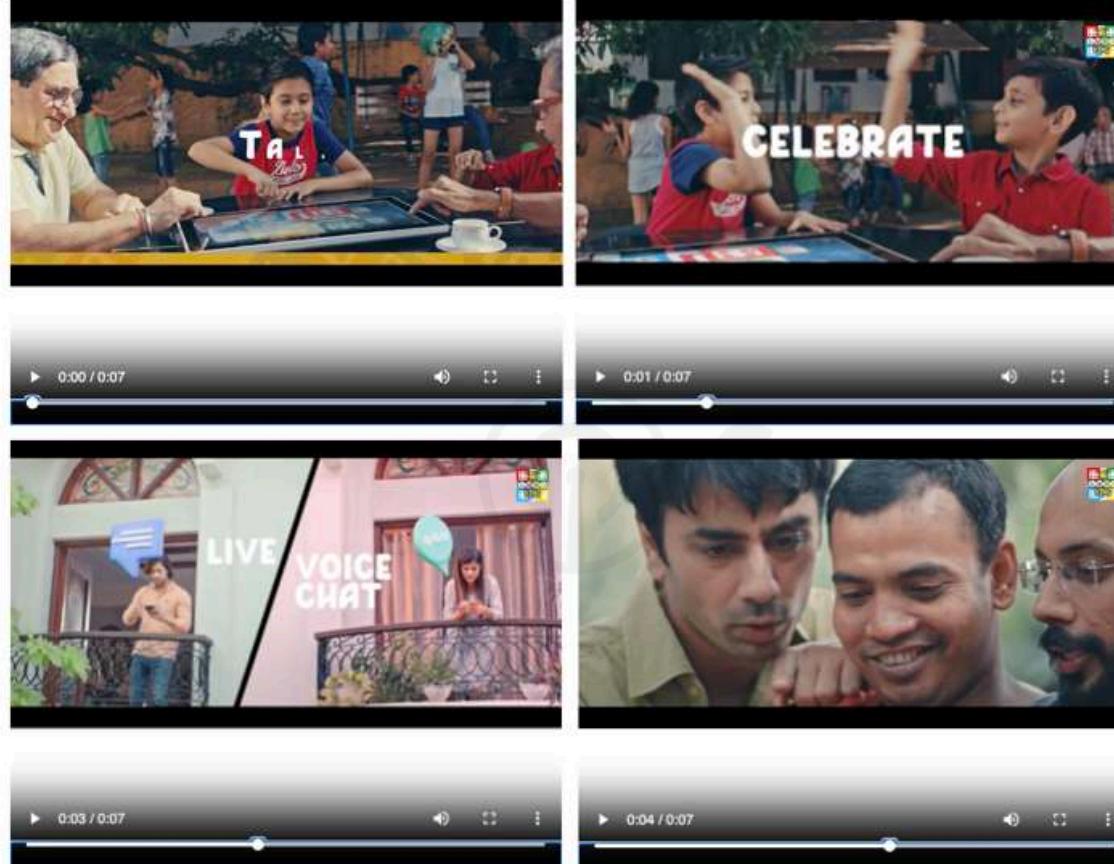


How Ludo King Captured India: Community-Centric Features and Social Gameplay

Ludo King's promotional strategy in India emphasizes communal bonding and joyful interactions, capturing the essence of family and community. By showcasing multiplayer experiences, celebrations, and live voice chat, the publisher successfully blends traditional board gaming with modern digital communication.

These engaging features bridge generations and distance, transforming the game into a beloved social connector and significantly contributing to its dominance across diverse demographics in India.

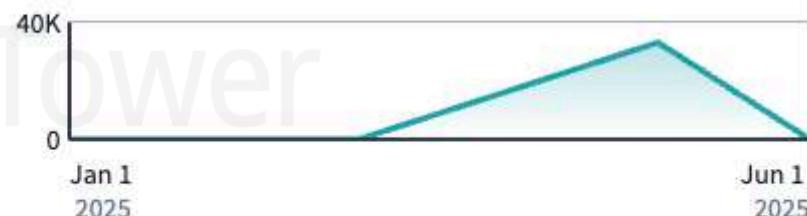
Gametion Technologies Pvt. Ltd. Video Ad
All Categories > Gaming



Gametion Technologies Pvt. Ltd.

Type	Placement
Video (Other)	In-Stream
First Seen	Last Seen
2025/04/27	2025/05/25

Impressions Trend



Caption
Talk, strategize and celebrate with live voice chat because victory sounds better together.

Video Duration	Dimensions	ID
7	854x446	891400416

Landing Page
<https://apps.apple.com/us/app/ludo...>

Data Source: Sensor Tower Pathmatics Digital Advertising Insights

Notes: Sensor Tower's data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. iOS Only for China. Revenue is gross — inclusive of any percent taken by the app stores.



India Game Publishers On the Global Stage

India-Based Publishers Maintain Domestic Strength While Tapping Overseas Revenue Growth

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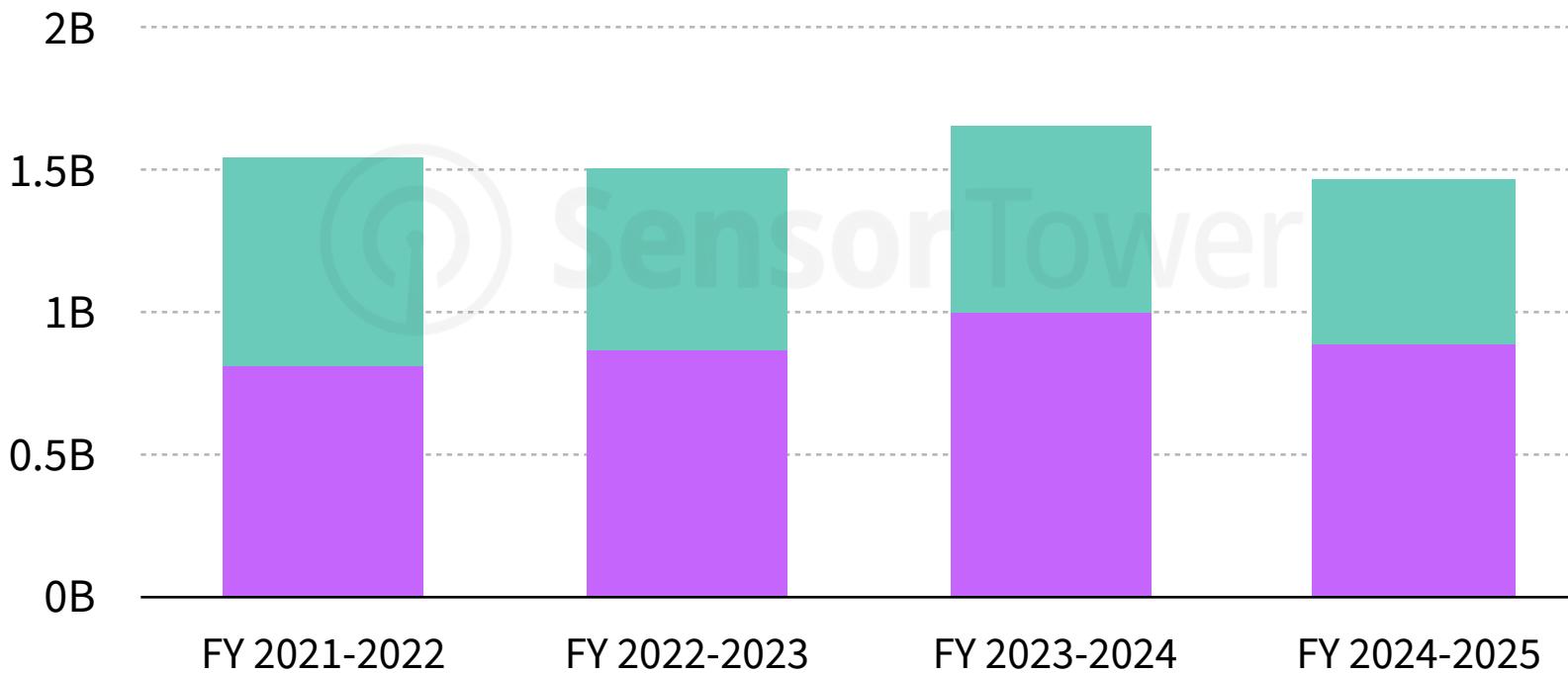
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Global Mobile Game Downloads By India HQ'd Publishers

FY 2019 - 20 to FY 2024 - 25

Domestic

Overseas Market

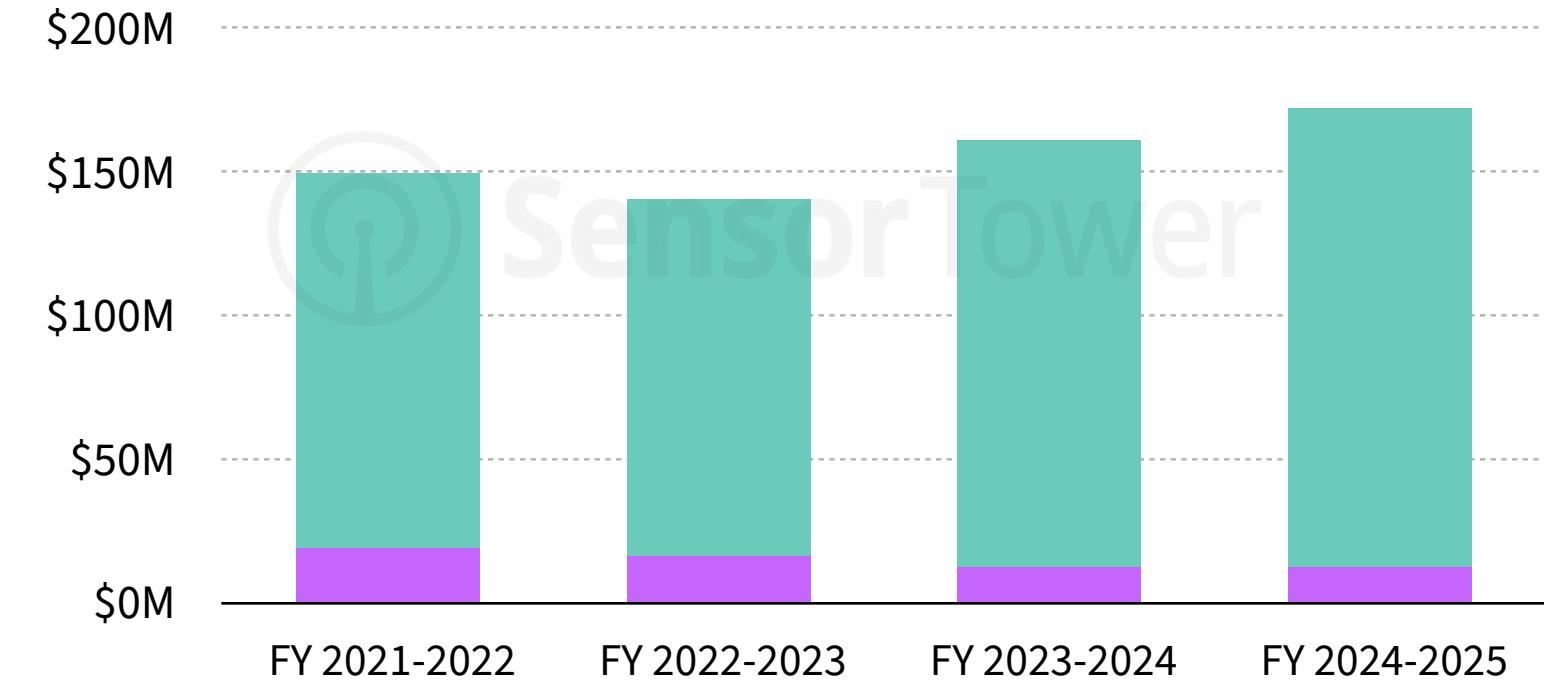


Global Mobile Game Revenue By India HQ'd Publishers

FY 2019 - 20 to FY 2024 - 25

Domestic

Overseas Market



India-based game publishers have maintained steady domestic strength, thanks to culturally resonant titles that drive consistent downloads. Games tapping into local traditions, simple mechanics, and social experiences keep India's massive, cost-sensitive audience engaged. Beyond India, markets like Indonesia, the US, and Brazil show strong growth, highlighting the global appeal of these publishers' strategies.

Meanwhile, India-based publishers are growing their overseas revenue, with the US, Saudi Arabia, and the UK now key markets. This shift reflects a push to diversify revenue beyond India's challenging monetization environment. By developing globally competitive games and investing in localization, these publishers are evolving into international contenders, strengthening both domestic and overseas performance.

Top India HQ'd Game Publishers: Stable Leaders and Rising Contenders Amid Dynamic Downloads and Revenue Shifts

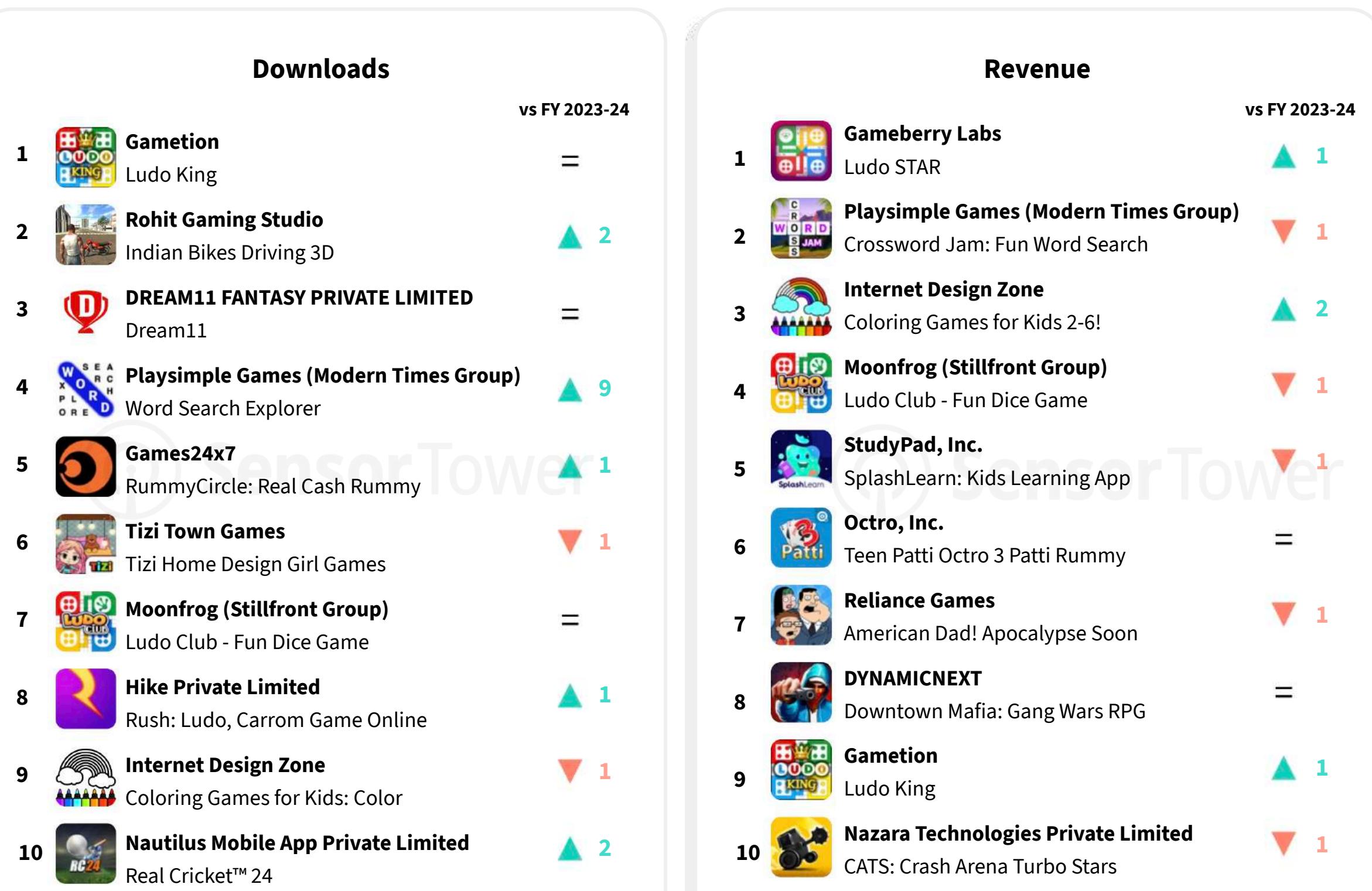
Gametion and Dream11 Fantasy maintain their dominance in downloads, led by *Ludo King* and *Dream11*. Rising stars like Playsimple Games and Rohit Gaming Studio highlight growing interest in diverse titles, such as driving and word search games, indicating a dynamic market with room for fresh contenders.

On the revenue front, Gameberry Labs leads with *Ludo STAR*, while Internet Design Zone and Playsimple Games perform steadily. Moonfrog and Reliance Games see slight dips, suggesting that monetization strategies are crucial for sustaining leadership even when downloads remain strong.

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Top 10 India HQ'd Game Publishers Worldwide • Apr 1, 2024 - Mar 31, 2025



Conclusion

1

India's Mobile Game Market: Massive Downloads, Emerging Monetization Opportunities

India remains the world's largest mobile gaming market in FY 2024-25, with 8.45 billion downloads driven by affordable data, smartphone access, and a young audience (77% aged 18-34). Google Play leads downloads, while iOS signals higher-value spenders. Despite lagging IAP revenue at just over \$400 million, rising UPI use and iOS growth signal monetization promise.

2

Genre Dynamics: Casual vs. Competitive

Downloads remain concentrated in accessible subgenres like Driving Simulators, Platformers, and Tabletop games—culturally familiar and easy to pick up, resonating strongly with local audiences. In contrast, revenue is driven by core competitive genres like Battle Royale shooters, Coin Looters, and 4X Strategy games, where higher in-app spending is sustained by deep engagement and social features. This duality reveals India's gaming market as both broad and fragmented—requiring publishers to balance mass reach with targeted monetization.

3

Ludo King's Enduring Reign: Cultural Resonance and Cross-Generational Appeal Drive 1.25 Billion Downloads

Ludo King has been India's most downloaded mobile game since 2017, crossing 1.25 billion downloads. Its success stems from digitalizing a traditional board game beloved across generations, making it accessible on smartphones with intuitive multiplayer, voice chat, and a family-friendly design. *Ludo King* resonates deeply with India's social fabric, fostering community bonding and nostalgia. Its broad appeal across demographics and consistent chart-topping performance cement its status as a flagship title, exemplifying how cultural relevance can drive enduring success.

4

Indian Publishers: Strong at Home, Expanding Abroad

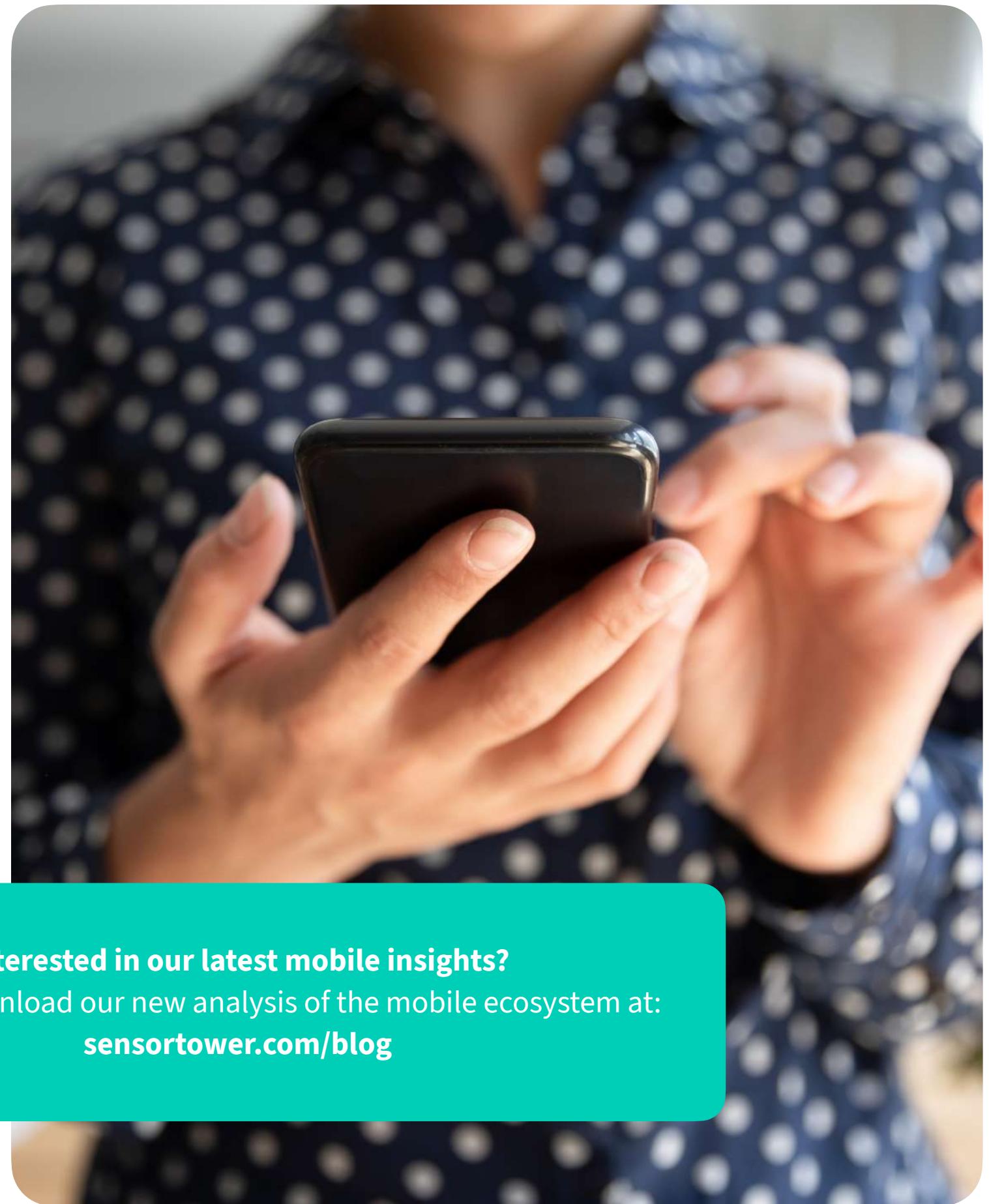
India-based publishers like Gametion (creator of *Ludo King*) and Dream11 maintain leadership in downloads, while Gameberry Labs and Playsimple Games shine in revenue. As downloads remain steady at home, publishers are increasingly eyeing overseas markets to tap into higher monetization potential. This reflects an evolution from local champions to global contenders, positioning India's gaming industry for broader success.

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Sensor Tower is the leading solution for mobile marketers, app developers, and industry analysts who demand competitive insights on the mobile economy. Sensor Tower's product suite includes: App Intelligence, Store Intelligence, Ad Intelligence, and Usage Intelligence.



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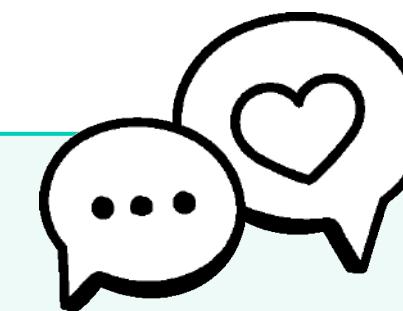


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