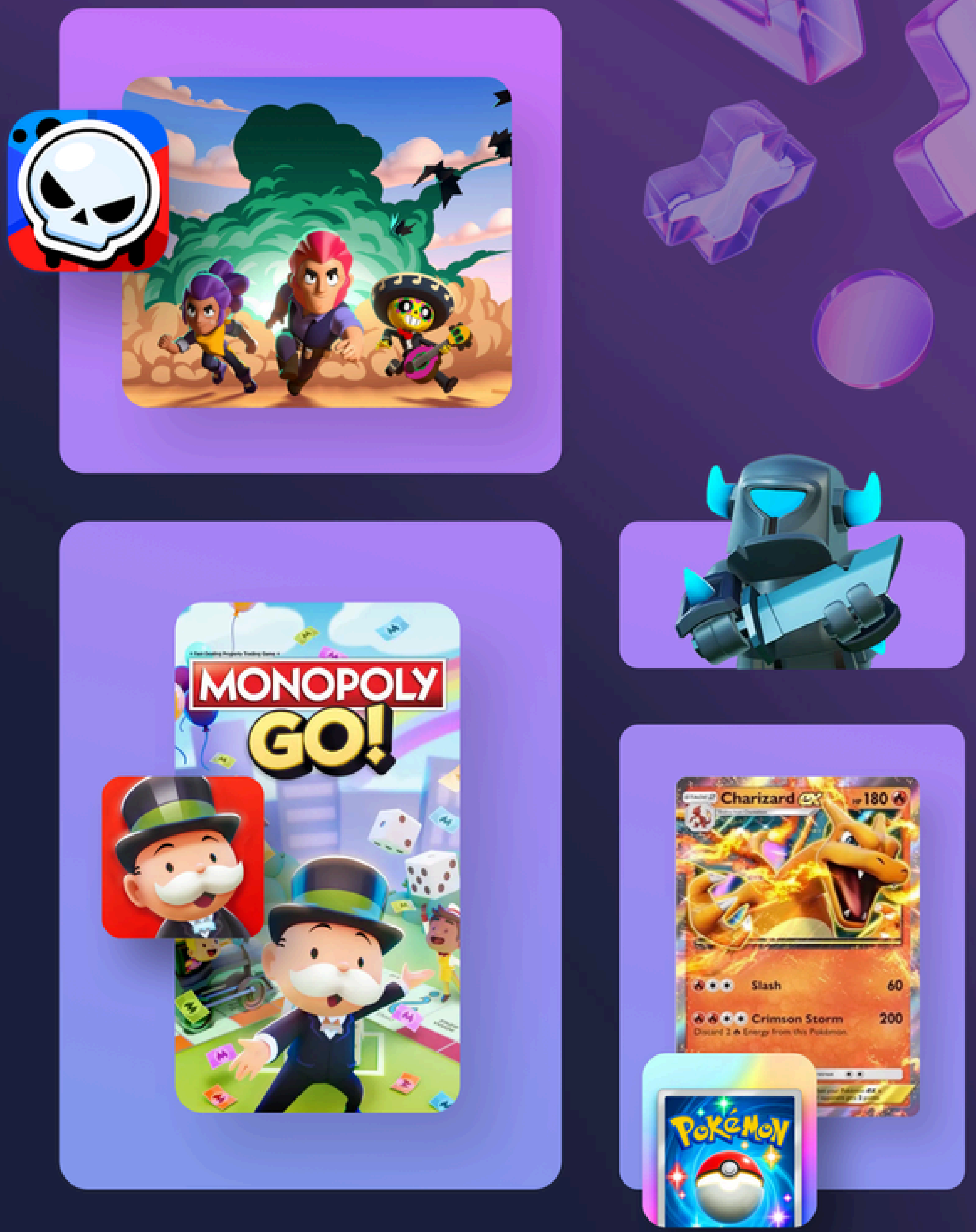
Sensor Tower

Report

State of Mobile Gaming 2025

The definitive mobile gaming industry report.



Executive Summary | Key Takeaways

01

Mobile gaming returns to growth.

In-app purchase revenue is up 4%, time spent is up 7.9%, and sessions are up 12% 2024 over 2023.

4% YoY increase mobile in game in-app purchases

02

Casual games drove the largest growth in the West.

North America saw the most absolute growth, while Asia was the only region to see in-app purchase revenue decline.

9% increase in Casual in-app purchase revenue in the US and Europe.

03

Developers increase focus on live services.

Developers refocus on existing titles due to difficulty attracting audiences to new titles in a privacy centric world.

84% of mobile gaming in-app purchases revenue went to games with live ops

04

Hybridcasual monetization adoption on the rise.

Combining in-app purchase and ad monetization has emerged as an optimized strategy.

37% increase in Hybridcasual game in-app purchase revenue

05

TikTok and AppLovin grow share of voice.

Analysis of top 200 games by downloads in select countries

67% increase in mobile game impression share on TikTok amongst social networks

397% increase in mobile game impression share on AppLovin amongst in-app ad networks

06

Hypercasual ad creative strategies were adopted.

Other product models utilized ad creative strategies used by hypercasual games to lower acquisition costs.

20 billion hypercasual game downloads in 2024

Executive Summary | Gaming at a Glance

New App Downloads

49
Billion

-6.6%
YoY Growth

iOS & Google Play

94,000 games downloaded per minute in 2024

IAP Purchases

$82
Billion

+3.8%
YoY Growth

iOS & Google Play

$156,000 spent per minute in 2024

Total Hours Spent

390
Billion

+7.9%
YoY Growth

iOS & Android Phones

> hours per person on earth in 2024

Total Sessions

3.5
Trillion

+12%
YoY Growth

iOS & Android Phones

1.2 sessions per day per person on Earth in 2024

Game ad impressions captured

>5
Trillion

iOS & Android Phones

>160,000 ad impressions every second in 2024

Contents

01 Mobile Game Macro Trends

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At CrazyLabs, we successfully embraced our transition to hybrid-casual gaming, aligning with evolving market trends. This strategic shift enabled us to craft more engaging player experiences while developing a robust pipeline of innovative titles. Our multiple successful game launches this year demonstrate our team's agility and dedication to delivering compelling content that resonates with today's players.

Sagi Schliesser
CEO & Founder
Crazy Labs

Mobile gaming back on growth track.

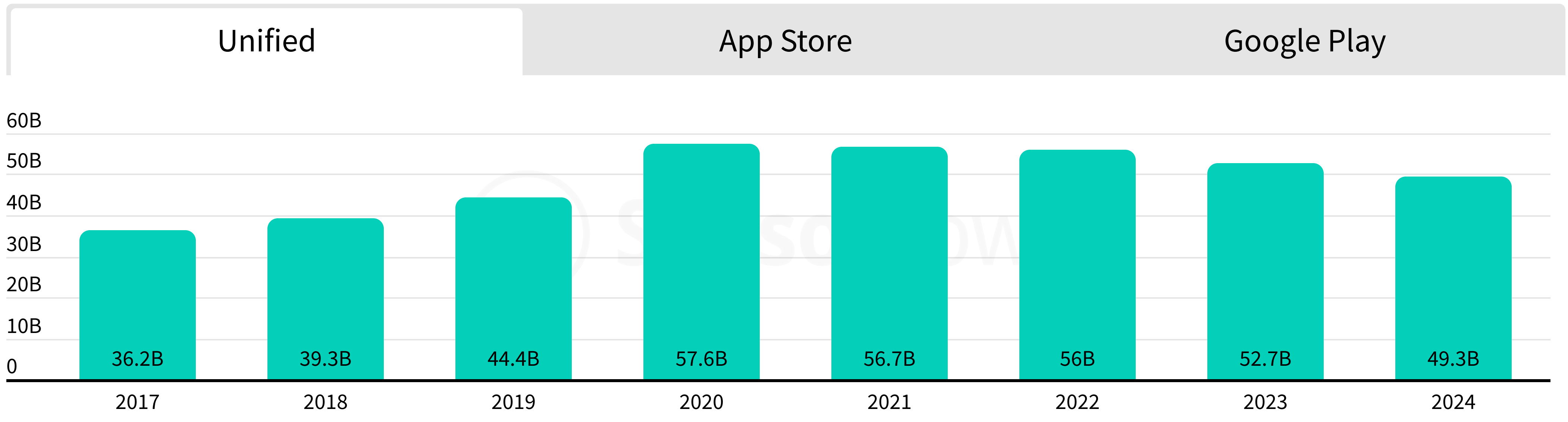
Downloads have plateaued as discoverability remains a challenge, yet developers who have mastered player retention and optimized ARPPU (Average Revenue Per Paying User) continue to thrive. Despite a decline in downloads from 57.6B in 2020 to 49.3B in 2024, IAP revenue remains strong, reaching $82B, surpassing the previous two years. This indicates that growth is being driven more by increased spending per payer rather than an influx of new users.

This points to a matured and consolidated free to play gaming ecosystem, where innovation is essential, not just for acquiring new players, but more importantly, for converting and retaining those payers.

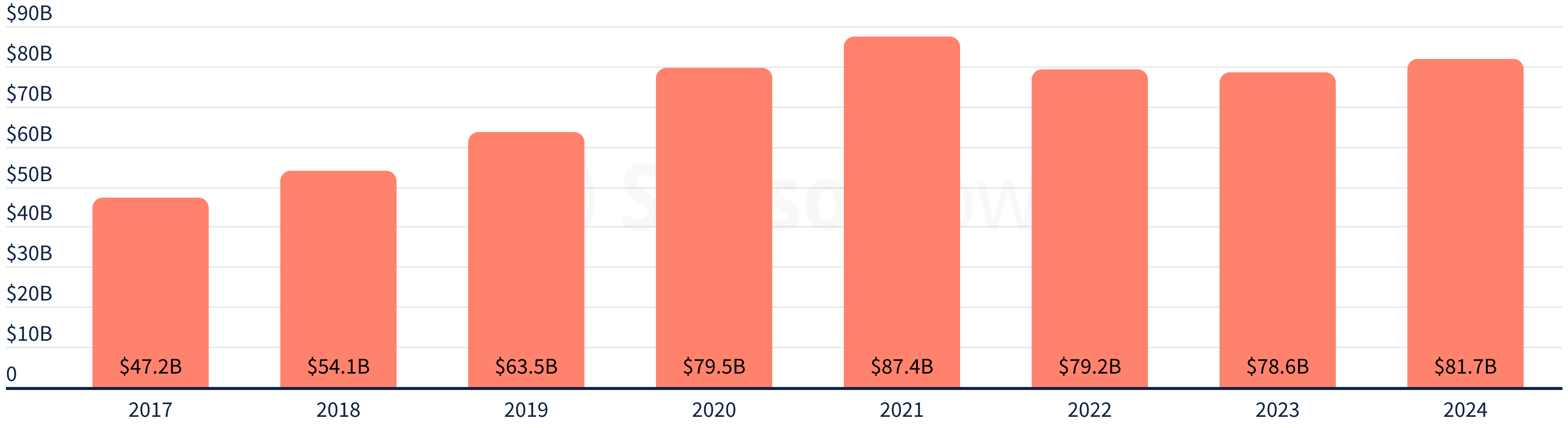
The iOS App Store remains the most valuable platform for IAP-driven audiences, particularly for Casual and Mid-core games, while the Google Play Store users continue to dominate video ad monetization, making it the preferred platform for Hypercasual and Hybridcasual models. Despite these distinct monetization advantages, successful new games must thrive on both platforms to maximize market potential.

2024 has been a year of stability, where game marketers and developers have had to double down on audience retention and engagement. As a result, Live Operations has become a key requirement for long-term success, ensuring that games remain competitive and profitable in an increasingly saturated market.

Downloads
Mobile gaming, Worldwide, App Store and Google Play



In-app purchase revenue
Mobile gaming, Worldwide, App Store and Google Play



Source: Sensor Tower
Note: iOS and Google Play combined. iOS only for China. Excludes third-party Android.

Mobile game engagement is on the rise.

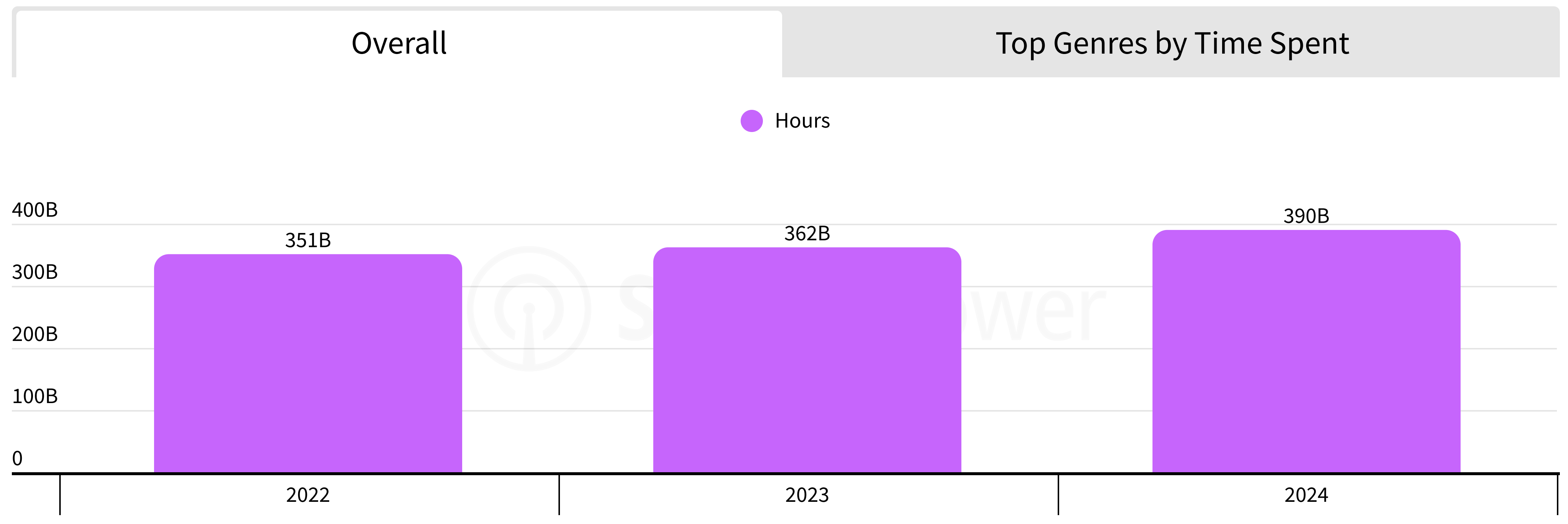
While mobile gamers aren't downloading new games as often, they are spending more time playing games, driving year over year in-app revenue growth. Developers are capitalizing on this behavior with a renewed focus on live operations: the method of treating games as a live service, with fresh content delivered regularly.

Strategy games saw the most time spent in them globally, with Brawl Stars driving the largest increase in time spent among strategy games. Brawl Stars had a groundbreaking year, adding a huge number of players in 2024.

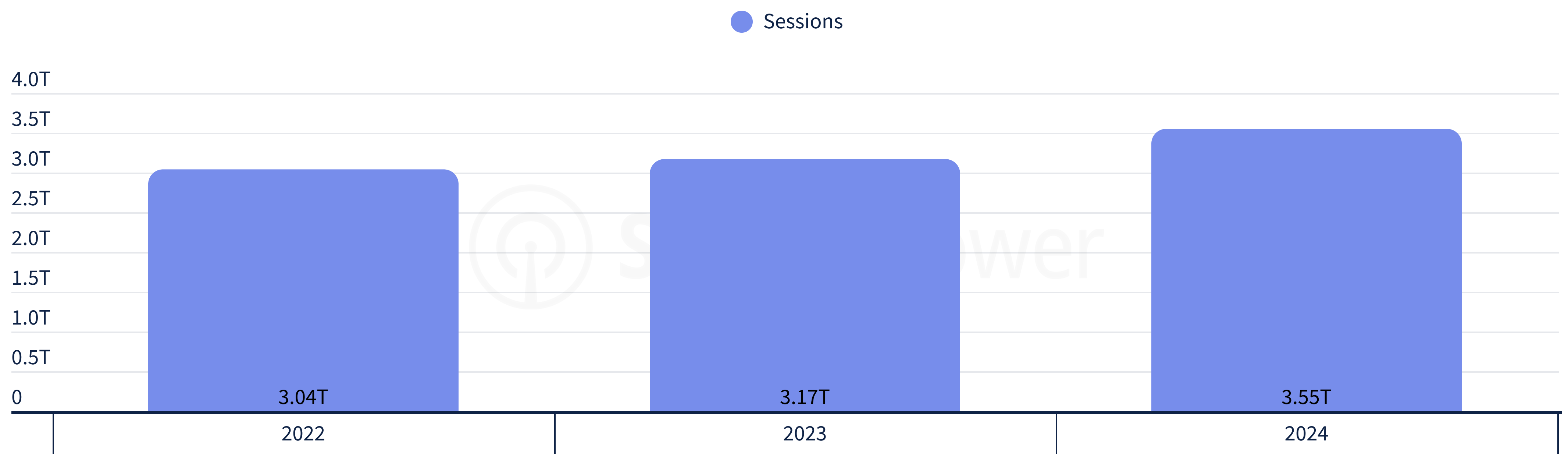
The next highest genres by time spent were Shooter, Simulation, Puzzle, Sports, and Arcade. The games driving the largest increase in time spent for each genre were Free Fire, Roblox, Royal Match, EA SPORTS FC Mobile Soccer, and Offline Games - No Wifi Games respectively.

Source: Sensor Tower
Note: iOS and Google Play combined. iOS only for China.

Total hours spent
Mobile gaming, Worldwide, App Store and Google Play



Total sessions
Mobile gaming, Worldwide, App Store and Google Play



Casual games saw the biggest download decline, but also the largest absolute IAP revenue gain.

Mobile Gaming Product Models

Mid-core

Mid-core games target a core gaming audience, offering quality long-progression gameplay. Typically have minimal ads, relying on retention and in-app purchases to generate revenue.

Examples: Call of Duty: Mobile, Clash of Clans, Honor of Kings

2024 Downloads
5.9 Billion
+1.2% YoY

2024 IAP Revenue
$45.9 Billion
+0.2% YoY

Casual

Casual games are designed for a casual audience with easy to understand game mechanics. Casual games monetize primarily through in-app purchases, but also incorporate ads.

Examples: Candy Crush Saga, Pokemon GO, MONOPOLY GO!

2024 Downloads
16.7 Billion
-16.7% YoY

2024 IAP Revenue
$32.4 Billion
+6.4% YoY

Hypercasual

Hypercasual games are low cost games with simple and repetitive game mechanics. Hypercasual games tend to have low retention and monetize almost 100% through ads.

Examples: Block Blast!, Mini Games: Calm & Chill, My Supermarket Simulator

2024 Downloads
20.1 Billion
-2.0% YoY

2024 IAP Revenue
$316 Million
+73.6% YoY

Hybridcasual

Hybridcasual games blend the simple gameplay of hypercasual games with long-term progression from mid-core games. These games tend to have around 50/50 ad and in-app purchases revenue.

Examples: Survivor!.io, Match Factory!, BangBang Survivor

2024 Downloads
6.5 Billion
+3.4% YoY

2024 IAP Revenue
$3.1 Billion
+37% YoY

Exclusive Access

Games accessible solely to members of an external subscription service, such as Netflix. Often similar to paid (not free to play) games.

Examples: GTA San Andreas - NETFLIX, Stranger Things: 1984, Football Manager 2024 Mobile

2024 Downloads
97 Million
+19.9% YoY

2024 IAP Revenue
$2.6 Million
+161% YoY

Source: Sensor Tower. Note: iOS and Google Play combined. iOS only for China. Revenue is gross — inclusive of any percent taken by the app stores.

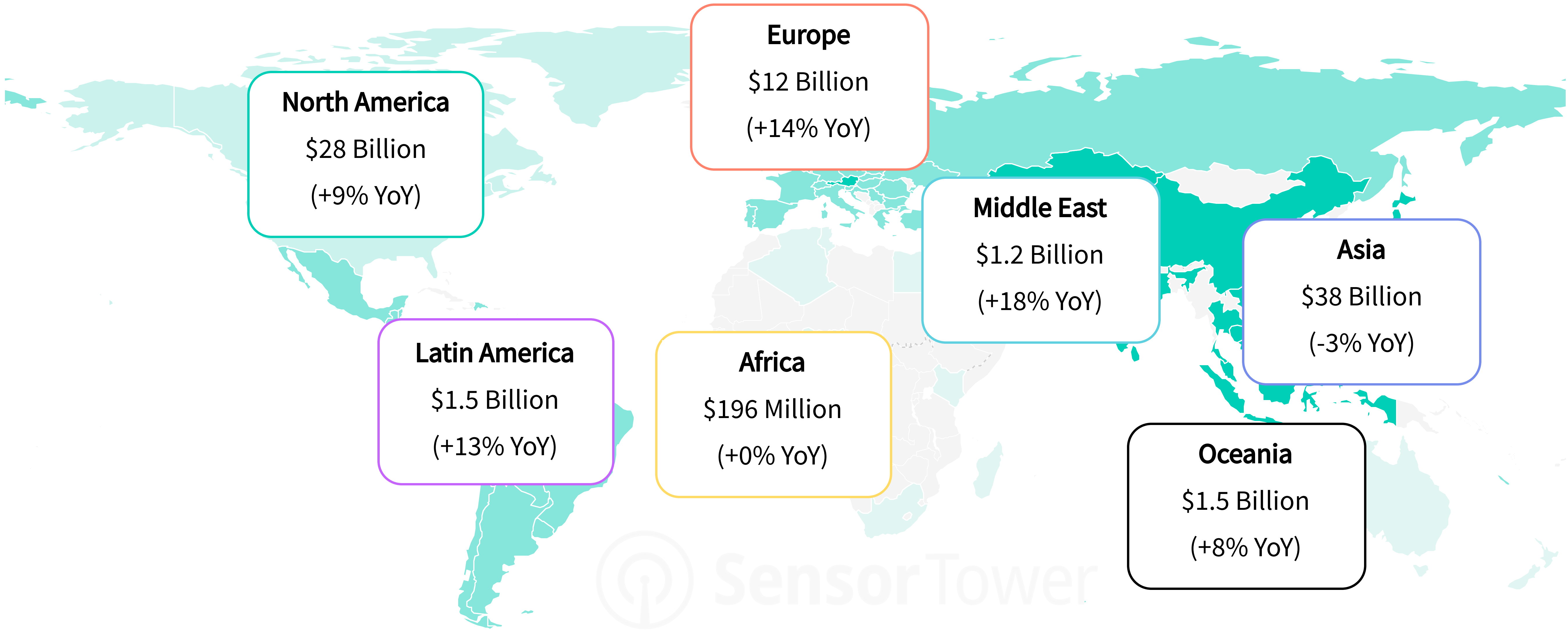
In-app purchase revenue grows outside of Asia despite download declines.

Latin America experienced one of the strongest YoY growth rates in mobile gaming, with a 13% increase in in-app purchase (IAP) revenue. This growth is largely driven by Brazil, which has become the go-to soft launch market for many publishers looking to test and refine their games before a global rollout. As a result, the region is solidifying its position as a key market for mobile gaming expansion. The Middle East continues to heavily invest in mobile gaming, with an impressive 18% YoY growth in IAP revenue, the highest among all regions. Beyond external investments, the region is also finding success in activating its internal market, with local players engaging more deeply in gaming ecosystems. This upward trend highlights the Middle East as an emerging powerhouse in the mobile gaming industry.

Source: Sensor Tower
Note: iOS and Google Play combined. iOS only for China.
Revenue is gross — inclusive of any percent taken by the app stores.

Mobile gaming by region 2024

Downloads | IAP Revenue



Understanding how Sensor Tower classifies games

Sensor Tower Mobile Game Genre Taxonomy

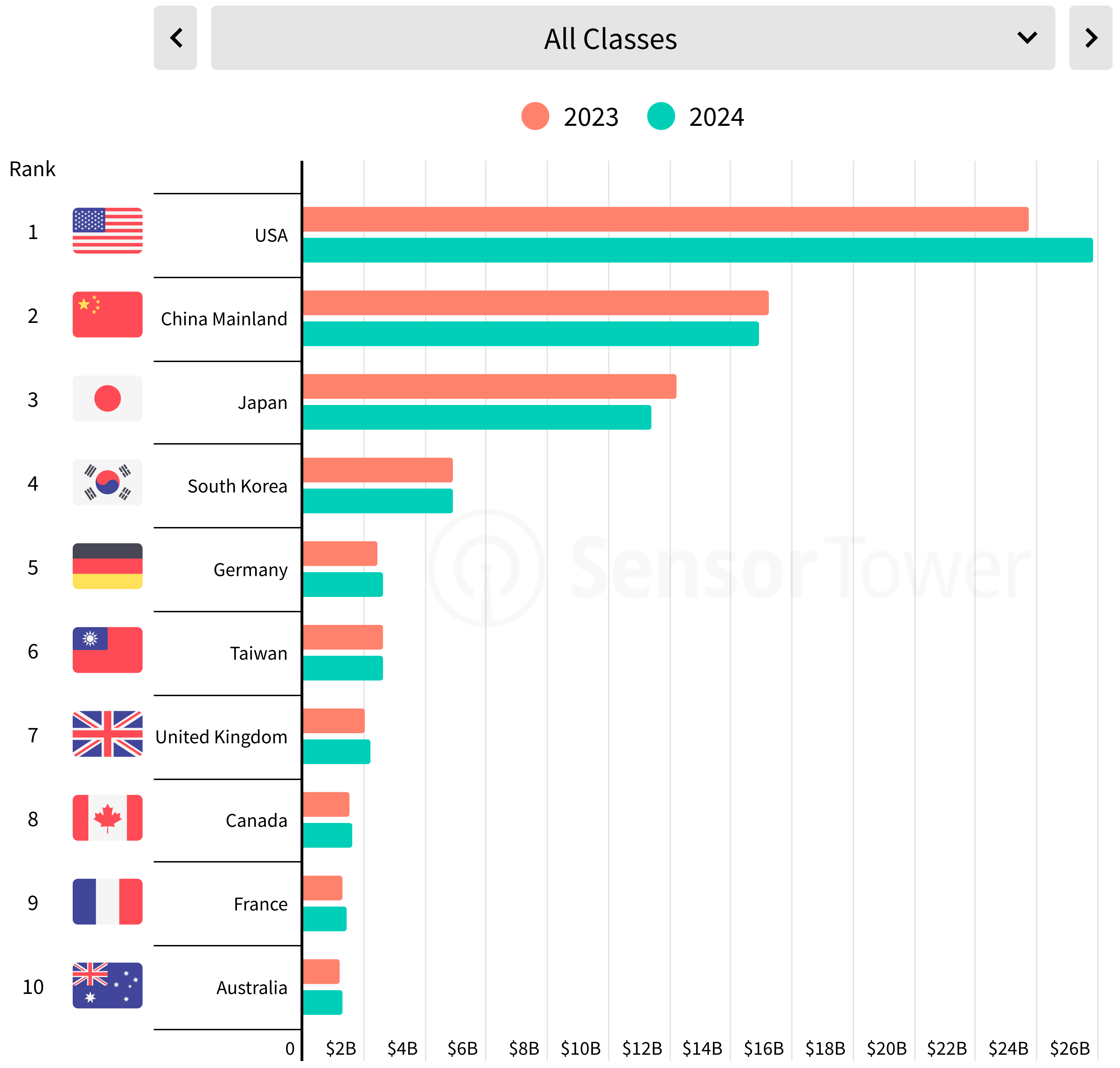
Examples:

Game Class	Puzzle & Lifestyle	Action & Strategy	Casino	Sports & Racing
Game Genre	Puzzle	Shooter	Casino	Sports
Game Sub-genre	Match Swap	FPS/3PS	Slots	Realistic Sports
Game	Royal Match	Call of Duty: Mobile	Jackpot Party	EA Sports FC Mobile

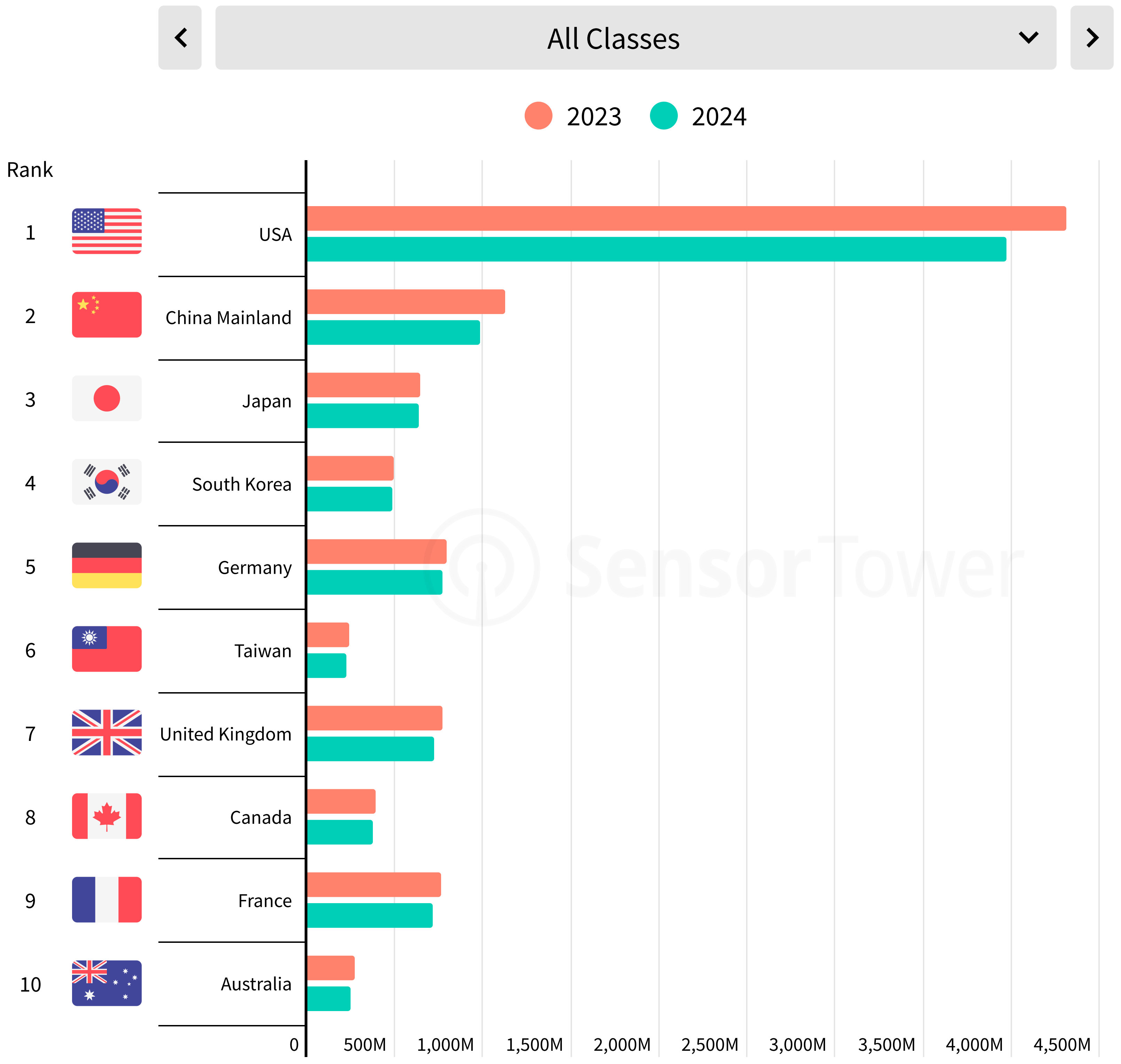
USA is still the largest market and grew the most in 2024.

Source: Sensor Tower
Note: iOS and Google Play combined. iOS only for China. Revenue is gross — inclusive of any percent taken by the app stores.

In-app purchase revenue by market



Downloads by market



Simulation and puzzle dominate 2024 mobile downloads, strategy showing strong momentum

In 2024, Simulation and Puzzle genres led global mobile game downloads, each capturing 20% of the total, with Simulation seeing slight growth (+0.4%) and Puzzle experiencing a modest decline (-3%). Arcade games, despite a significant 12.5% drop, maintained 19% of all downloads, reflecting their enduring popularity. Lifestyle and Action genres faced steeper declines, while Strategy games achieved notable growth (+14.5%) in downloads. Notably, Strategy games punched above their weight, commanding 21.4% of revenue despite accounting for only 4% of total downloads. These trends highlight a market where established genres continue to dominate, but emerging growth in niche categories offers new opportunities.

Source: Sensor Tower. Note: iOS and Google Play combined. iOS only for China. Revenue is gross — inclusive of any percent taken by the app stores. Apps classified using Sensor Tower's Game taxonomy as of January 5, 2025.

2024 | Worldwide top mobile game genres by downloads | Powered by Sensor Tower Game Taxonomy

Worldwide

#1 - Simulation

9.8 B in Downloads
- YoY Downloads +0.4% ▲
- YoY IAP Revenue +8.8% ▲
- 20% of All Downloads ▲
- 7.4% of All IAP Revenue ▲

#2 - Puzzle

9.7 B in Downloads
- YoY Downloads -3.0% ▼
- YoY IAP Revenue +14.0% ▲
- 20% of All Downloads ▲
- 14.9% of All IAP Revenue ▲

#3 - Arcade

9.6 B in Downloads
- YoY Downloads -12.5% ▼
- YoY IAP Revenue -22.6% ▼
- 19% of All Downloads ▼
- 2.0% of All IAP Revenue ▼

#4 - Lifestyle

4.0 B in Downloads
- YoY Downloads -10.0% ▼
- YoY IAP Revenue +51.4% ▲
- 8% of All Downloads ▼
- 2.5% of All IAP Revenue ▲

#5 - Tabletop

2.6 B in Downloads
- YoY Downloads -7.3% ▼
- YoY IAP Revenue +1.1% ▲
- 5% of All Downloads ▼
- 1.8% of All IAP Revenue ▼

#6 - Action

2.4 B in Downloads
- YoY Downloads -7.9% ▼
- YoY IAP Revenue +46.0% ▲
- 5% of All Downloads ▼
- 4.4% of All IAP Revenue ▲

#7 - Shooter

2.4 B in Downloads
- YoY Downloads +1.5% ▲
- YoY IAP Revenue +3.4% ▲
- 5% of All Downloads ▲
- 5.3% of All IAP Revenue ▼

#8 - Strategy

2.1 B in Downloads
- YoY Downloads +14.5% ▲
- YoY IAP Revenue +16.2% ▲
- 4% of All Downloads ▲
- 21.4% of All IAP Revenue ▲

Strategy and RPG lead global consumer spend in 2024.

In 2024, Strategy games topped global consumer spending with $17.5 billion, closely followed by RPGs at $16.8 billion. Puzzle and Casino genres secured third and fourth positions, contributing $12.2 billion and $11.7 billion, respectively, with Puzzle games showcasing robust monetization despite declining downloads. Action, Simulation, and Shooter genres recorded significant growth, with Action leading the way in revenue gains (+46%). Sports games, though facing a drop in downloads, still generated $2.7 billion. These trends underline the strong monetization potential of competitive and immersive genres such as Strategy, RPG, and Action, which continue to captivate players globally.

Source: Sensor Tower. Note: iOS and Google Play combined. iOS only for China. Revenue is gross — inclusive of any percent taken by the app stores. Apps classified using Sensor Tower's Game taxonomy as of January 5, 2025.

2024 | Worldwide top mobile game genres by IAP revenue | Powered by Sensor Tower Game Taxonomy

Worldwide

#1 - Strategy
- $17.5 B in IAP Revenue
- YoY IAP Revenue +16.2% ▲
- YoY Downloads +14.5% ▲
- 21.4% of All IAP Revenue ▲
- 4% of All Downloads ▲

#2 - RPG
- $16.8 B in IAP Revenue
- YoY IAP Revenue -17.3% ▼
- YoY Downloads -6.1% ▼
- 20.5% of All IAP Revenue ▼
- 3% of All Downloads ▲

#3 - Puzzle
- $12.2 B in IAP Revenue
- YoY IAP Revenue +14.0% ▲
- YoY Downloads -3.0% ▼
- 14.9% of All IAP Revenue ▲
- 20% of All Downloads ▲

#4 - Casino
- $11.7 B in IAP Revenue
- YoY IAP Revenue +8.9% ▲
- YoY Downloads -39.6% ▼
- 14.3% of All IAP Revenue ▲
- 2% of All Downloads ▼

#5 - Simulation
- $6.1 B in IAP Revenue
- YoY IAP Revenue +8.8% ▲
- YoY Downloads +0.4% ▲
- 7.4% of All IAP Revenue ▲
- 20% of All Downloads ▲

#6 - Shooter
- $4.3 B in IAP Revenue
- YoY IAP Revenue +3.4% ▲
- YoY Downloads +1.5% ▲
- 5.3% of All IAP Revenue ▼
- 5% of All Downloads ▲

#7 - Action
- $3.6 B in IAP Revenue
- YoY IAP Revenue +46.0% ▲
- YoY Downloads -7.9% ▼
- 4.4% of All IAP Revenue ▲
- 5% of All Downloads ▼

#8 - Sports
- $2.7 B in IAP Revenue
- YoY IAP Revenue -6.3% ▼
- YoY Downloads -10.6% ▼
- 3.4% of All IAP Revenue ▼
- 4% of All Downloads ▼

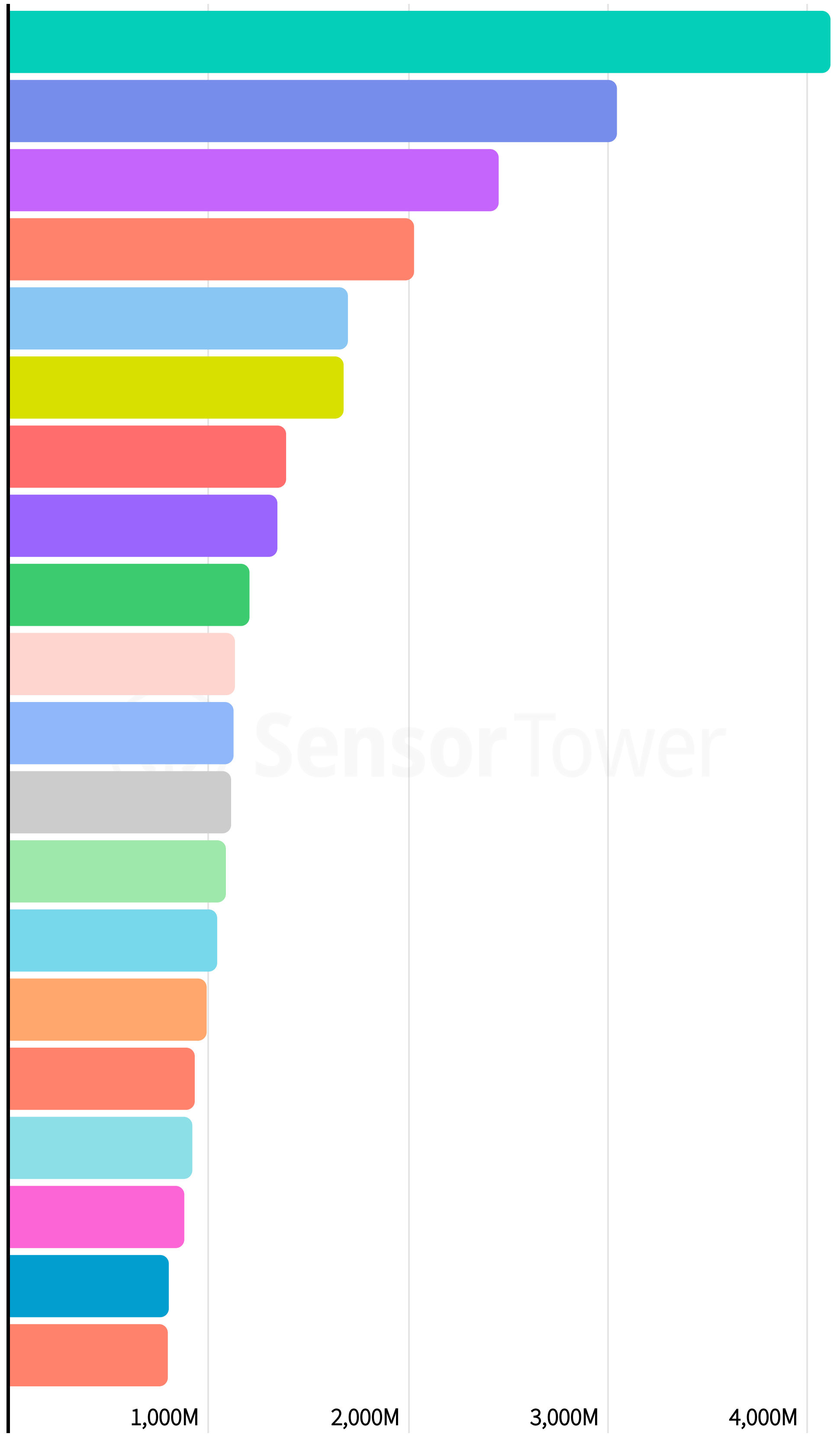
Arcade, platformer, and simulation subgenres led mobile game downloads in 2024.

Arcade Platformer/Runner games led global mobile game downloads in 2024, capturing 8.34% of the share, driven by the enduring popularity of Subway Surfers. Simulation subgenres followed closely, with Simulator (6.17%) and Driving/Flight Simulator (4.98%) reflecting strong interest in immersive, task-based gameplay exemplified by My Supermarket Simulator 3D and Vehicle Masters.

Lifestyle Customization titles, led by Avatar World, gained traction, showcasing the growing appeal of personalization. Puzzle Riddle games, including Brain Test: Tricky Puzzles, maintained a steady 3.43% share. Meanwhile, Shooters such as Call of Duty: Mobile held competitive positions, underscoring sustained demand for action-packed experiences.

The diverse performance across genres highlights a balanced demand for casual and immersive games, offering developers opportunities to innovate and adapt to evolving global player preferences.

Top 20 global mobile game subgenres by Downloads in 2024



Subgenre	Share of Total	#1 App
Arcade | Platformer / Runner	8.34%	Subway Surfers
Simulation | Simulator	6.17%	My Superstore Simulator
Simulation | Driving / Flight Simulator	4.97%	Vehicle Masters
Lifestyle | Customization	4.11%	Avatar World Games for Kids
Puzzle | Riddle	3.43%	Brain Test: Tricky Puzzles
Arcade | Other Arcade	3.39%	Offline Games - No Wifi Games
Racing | Arcade Racing	2.81%	Car Race
Simulation | Sandbox	2.72%	ROBLOX
Sports | Realistic Sports	2.43%	8 Ball Pool
Action | Action Sandbox	2.29%	Indian Bikes Driving 3D
Lifestyle | Virtual Pet	2.27%	My Talking Tom 2
Shooter | FPS / 3PS	2.25%	Call of Duty: Mobile
Tabletop | Board	2.19%	Ludo King
Simulation | Idler	2.11%	My Perfect Hotel
Arcade | Arcade Driving	2.00%	Hill Climb Racing
Tabletop | Drawing & Coloring	1.88%	Coloring Alphabet ASMR
Arcade | Music / Rhythm	1.85%	Magic Tiles 3
Puzzle | Physics	1.77%	Wood Nuts & Bolts Puzzle
Puzzle | Match Swap	1.61%	Royal Match
Arcade | Arcade Combat	1.60%	Agent Hunt

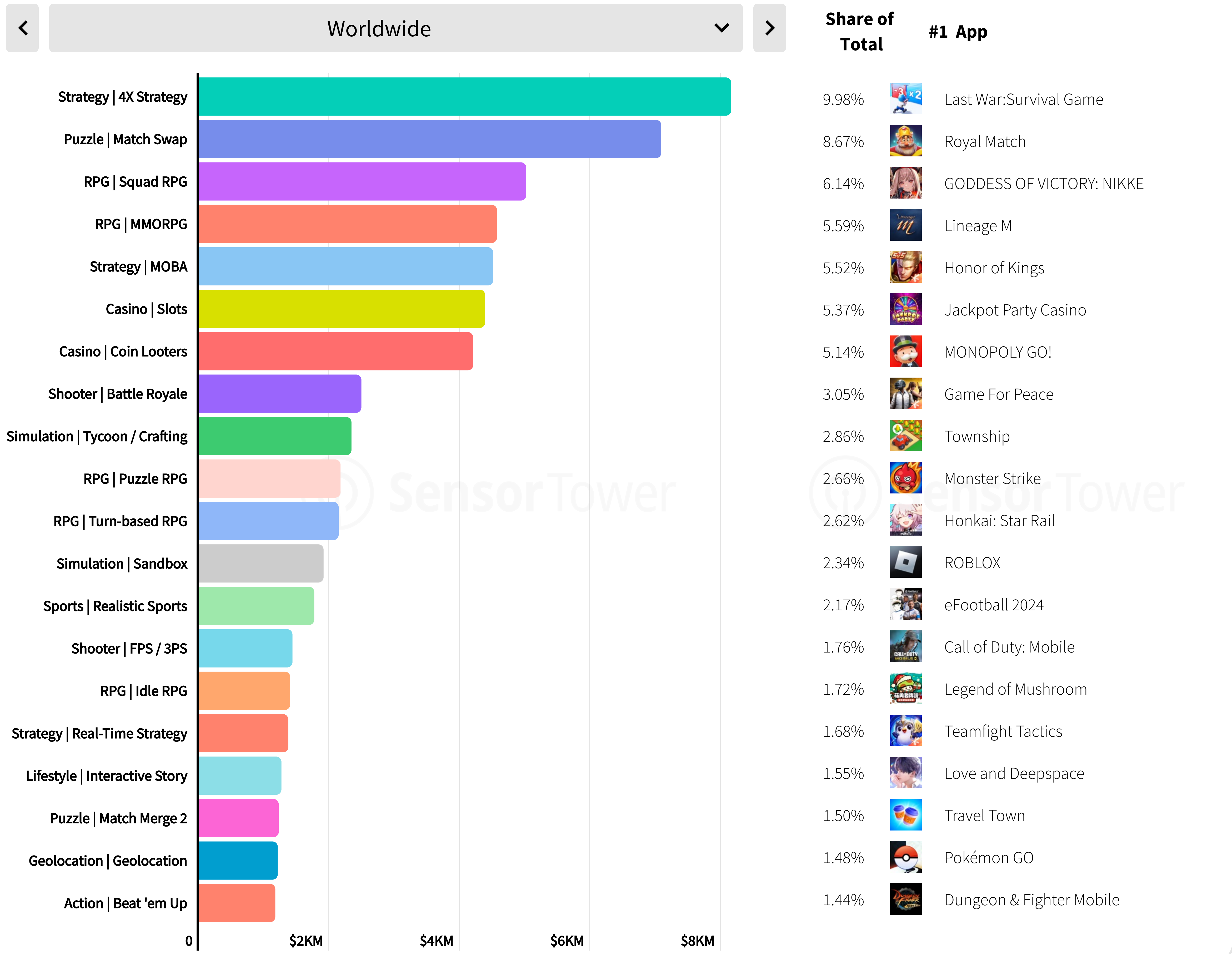
Source: Sensor Tower
Note: iOS and Google Play combined. iOS only for China. Excludes third-party Android. Apps classified using Sensor Tower's Game taxonomy as of January 5, 2025.

4X strategy games top IAP revenue in 2024, with puzzle and RPG subgenres following close.

In 2024, Strategy games dominated global consumer spend, with 4X Strategy leading the charge, capturing just under 10% of the market share, driven by Last War: Survival. Match Swap Puzzle games followed closely at 8.67%, fueled by the success of titles like Royal Match. RPG subgenres, including Squad RPGs (6.14%) and MMORPGs (5.59%), continued to deliver strong contributions, showcasing their lasting appeal among dedicated players.

Casino Slots (5.37%) and Coin Looters (5.14%) demonstrated robust monetization, while Battle Royale games, led by Game for Peace (3.05%), maintained a loyal player base. Simulation subgenres, particularly Tycoon/Crafting, also gained momentum. These trends highlight the dominance of immersive and strategy-focused genres, with a balance of enduring favorites and new entrants driving sustained growth in the market.

Top 20 global mobile game subgenres by IAP revenue in 2024



Source: Sensor Tower.
Note: iOS and Google Play combined. iOS only for China. Revenue is gross — inclusive of any percent taken by the app stores. Apps classified using Sensor Tower's Game taxonomy as of January 5, 2025.

Shooters and strategy subgenres lead global time spent in 2024

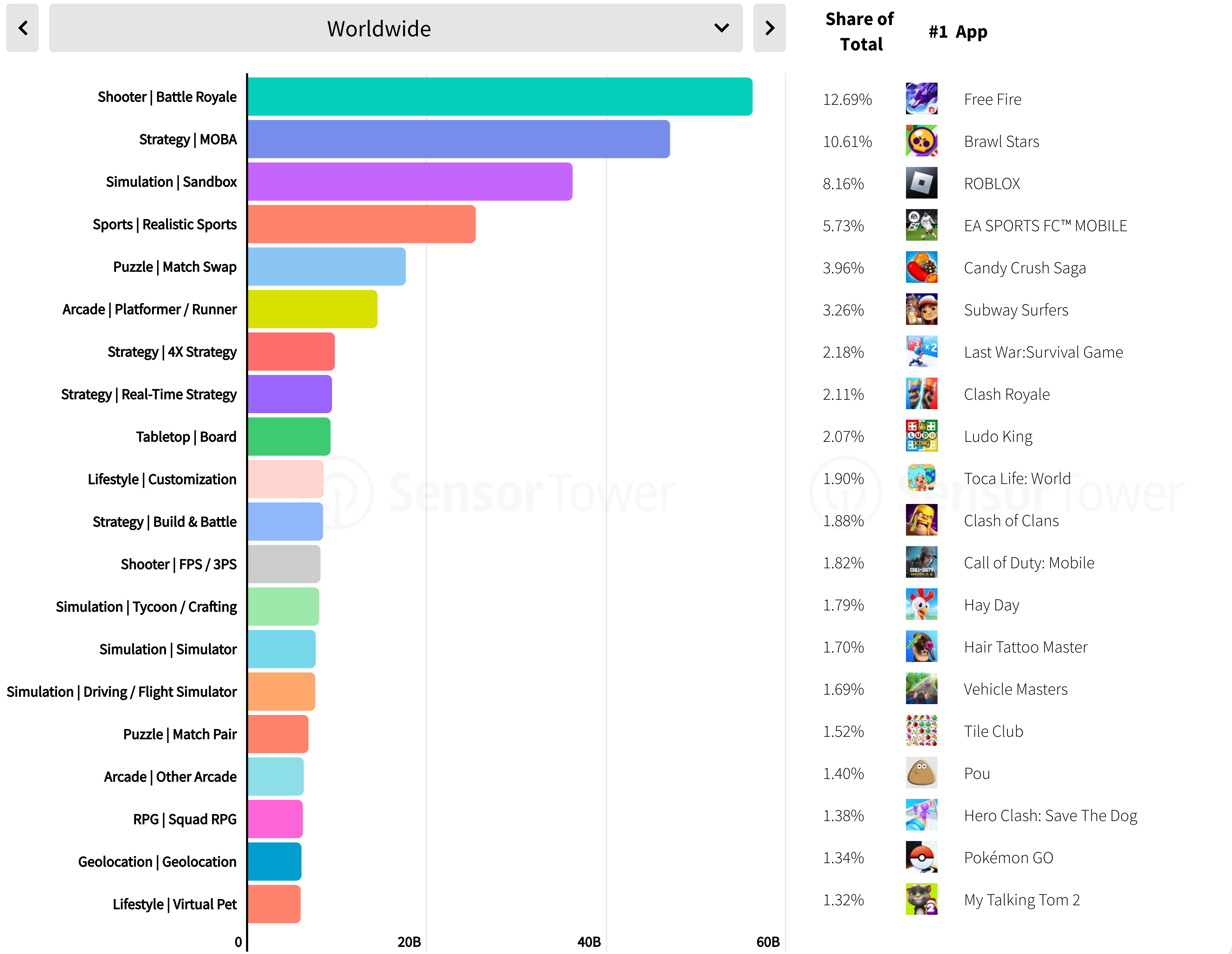
In 2024, Shooter (Battle Royale) and Strategy (MOBA) subgenres dominated global time spent, led by Garena Free Fire and Brawl Stars. These genres captured significant player engagement, reflecting their strong competitive and multiplayer appeal. Simulation Sandbox games, with Roblox as the top title, also maintained high levels of player investment.

Casual and task-based genres like Puzzle (Match Swap) and Sports (Realistic Sports) continued to attract steady time spent, driven by Candy Crush Saga and EA SPORTS FC™ Mobile Soccer. Meanwhile, subgenres such as Arcade (Platformer/Runner) and Lifestyle (Customization) retained moderate engagement, showing the enduring popularity of familiar, easy-to-play formats. This highlights how competitive, immersive genres dominate time spent, while casual titles sustain consistent, loyal audiences.

Navigate Macroeconomic Headwinds:
Be the first to spot potential breakout apps in your sector with detailed genres and subgenres from Sensor Tower's Gaming Insights.

Source: Sensor Tower
Note: iOS and Google Play combined. Apps classified using Sensor Tower's game taxonomy as of January 5, 2025.

Top 20 global mobile game subgenres by time spent in 2024

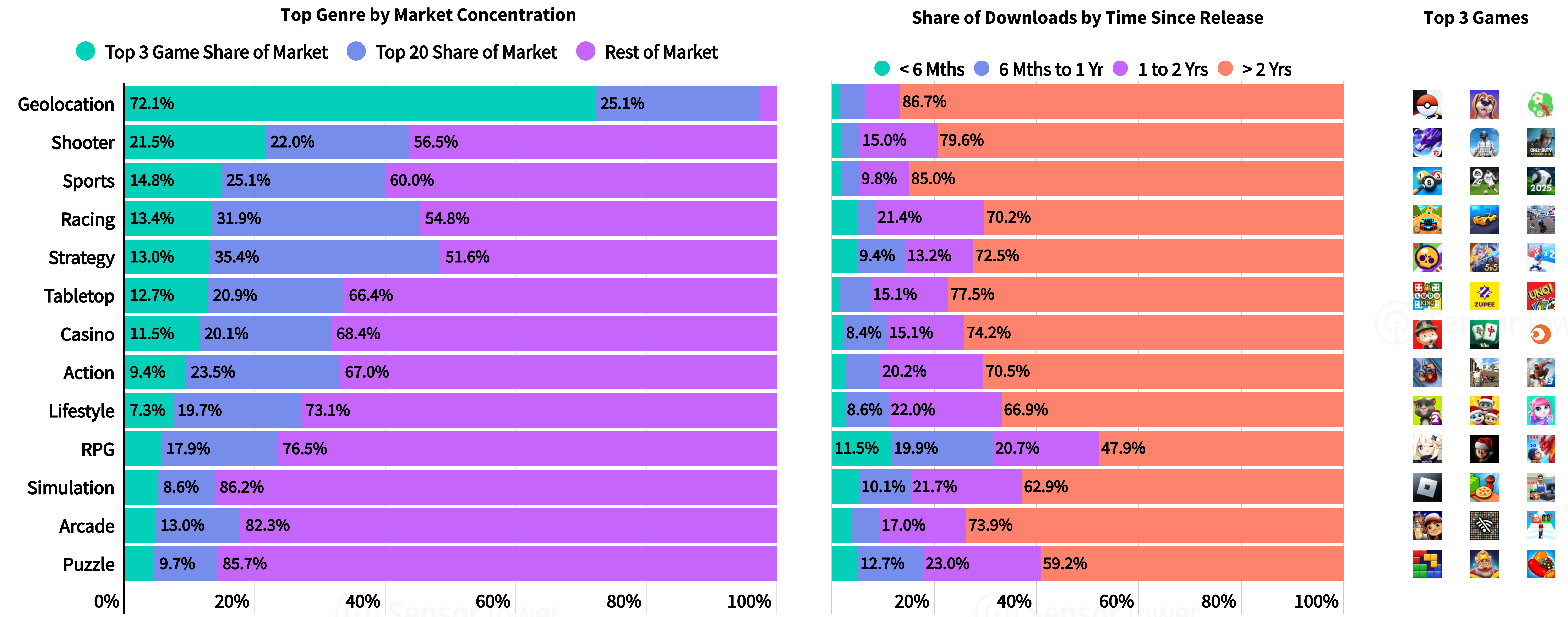


Geolocation shows highest market concentration while sports and arcade lead in longevity.

In 2024, Geolocation games exhibited the highest market concentration, with the top three titles accounting for 72.1% of downloads, significantly outpacing Shooter (21.5%) and Sports (14.8%), which faced broader competition. Meanwhile, Simulation, Arcade, and Puzzle genres remained highly fragmented, with more than 80% of downloads distributed across smaller games. Geolocation and Sports genres also leaned heavily on older titles. In contrast, RPG games saw less than 50% of downloads driven by older titles, highlighting the competitive momentum and appeal of newer releases.

2024 | Top mobile game genres per market concentration by downloads

Worldwide

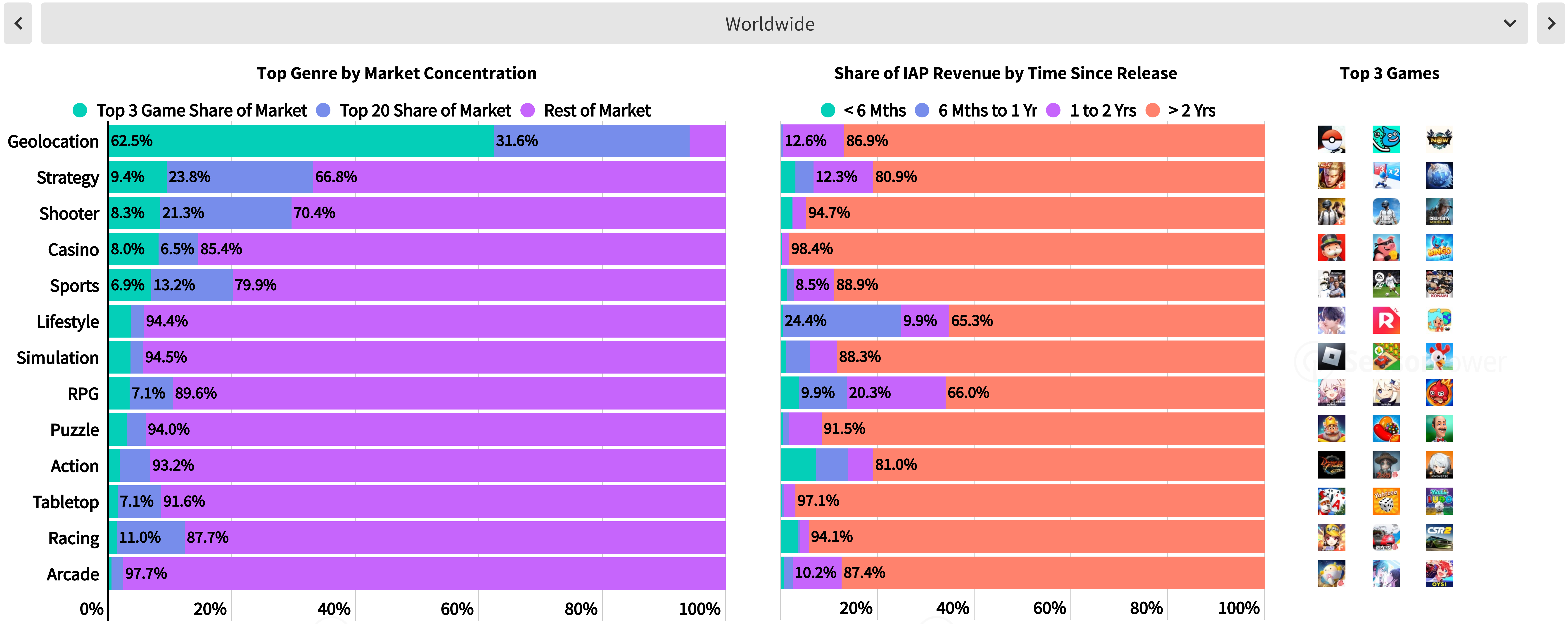


Source: Sensor TowerNote: iOS and Google Play combined. iOS only for China. Excludes third-party Android. Apps classified using Sensor Tower's taxonomy as of January 5, 2025.

Geolocation stands out as the most concentrated genre, while older games continue to drive revenue.

In 2024, Geolocation games led market concentration, with the top three titles accounting for 62.5% of consumer spend. Strategy (9.4%) and Shooter (8.3%) followed but were more diversified, while genres like Simulation, Lifestyle, and Arcade saw 94–8% of spend distributed across smaller titles. Older games contributed over 80% of consumer spend in most genres. RPG and Lifestyle games demonstrated more balance, with mid-term releases playing a larger role, signaling growth opportunities in less concentrated markets.

2024 | Top mobile game genres per market concentration by IAP revenue



Source: Sensor Tower

Note: iOS and Google Play combined. iOS only for China. Excludes third-party Android. Apps classified using Sensor Tower's game taxonomy as of January 5, 2025.

Launches still drive significant growth in 2024.

While LiveOps remains a critical factor for success, 2024 has shown that new releases can still achieve massive popularity and revenue growth. Titles like Pokémon TCG Pocket, Legend of Mushroom, Zenless Zone Zero, and BangBang Survivor have managed to overcome marketing challenges and capture a significant share of the market by offering fresh experiences that resonate with players.

Action & Strategy has emerged as the leading category for new product innovation in 2024, indicating that mid-core mechanics blended with accessible gameplay loops still present significant opportunities for growth. The market continues to evolve, proving that both LiveOps and well-executed new launches remain viable paths to success.

An interesting shift in the ecosystem can be observed in gross revenue growth. Games that ranked between the top 500-1000 in 2023 have seen a notable rise, driven by seasonal events and the ability to retain players and payers within closed ecosystems. This highlights the continued importance of strong engagement strategies, even for games that were not initially at the top.

Casino games have seen the least disruption in terms of top performers, with the highest-grossing titles remaining largely stable in 2024. On the other hand, Sports & Racing games have experienced a significant gross revenue decline, likely driven by high competition and market saturation, making it harder for individual titles to maintain dominance.

2024 IAP revenue gross growth and decline of 2024 launches and top games of 2023

Worldwide, App Store and Google Play, top 1000 games by IAP revenue per category

Source: Sensor Tower
Note: iOS and Google Play combined. iOS only for China. Spend is gross — inclusive of any percent taken by the app stores.

Shooters and strategy dominate download growth while casino tops IAP revenue growth.

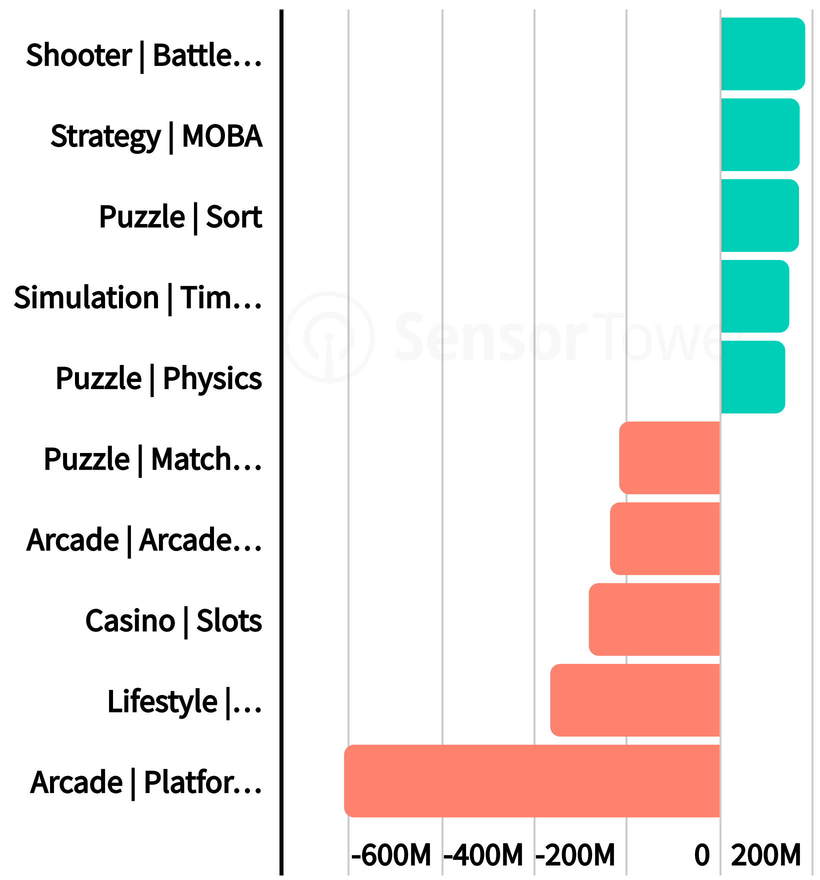
In 2024, Shooter and Strategy subgenres led download growth, driven by hits like Garena Free Fire and Brawl Stars. Simulation games also grew, while Arcade and Lifestyle saw declines. Casino games topped revenue growth, with Action and Strategy also showing strong monetization. RPG subgenres declined, reflecting shifting player spending habits and highlighting opportunities in competitive and casual genres.

Source: Sensor Tower.
Note: iOS and Google Play combined. iOS only for China. Revenue is gross — inclusive of any percent taken by the app stores. Apps classified using Sensor Tower's Game taxonomy as of January 5, 2025.

Top Breakout Gaming Subgenres: 2024 vs 2023

YoY Download Growth (Millions)

Worldwide

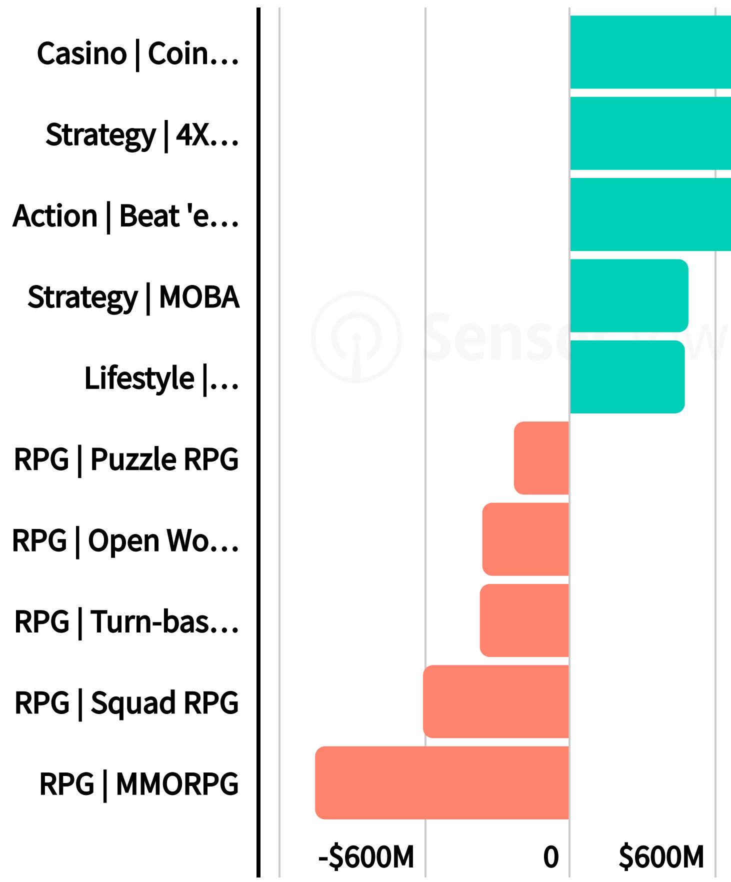


#1 Game By Downloads

- Free Fire
- Brawl Stars
- Traffic Escape!
- Pizza Ready
- Wood Nuts & Bolts Puzzle
- Royal Match
- Hill Climb Racing
- Slotomania
- Avatar World Games for Kids
- Subway Surfers

YoY IAP Revenue Growth (Millions)

Worldwide

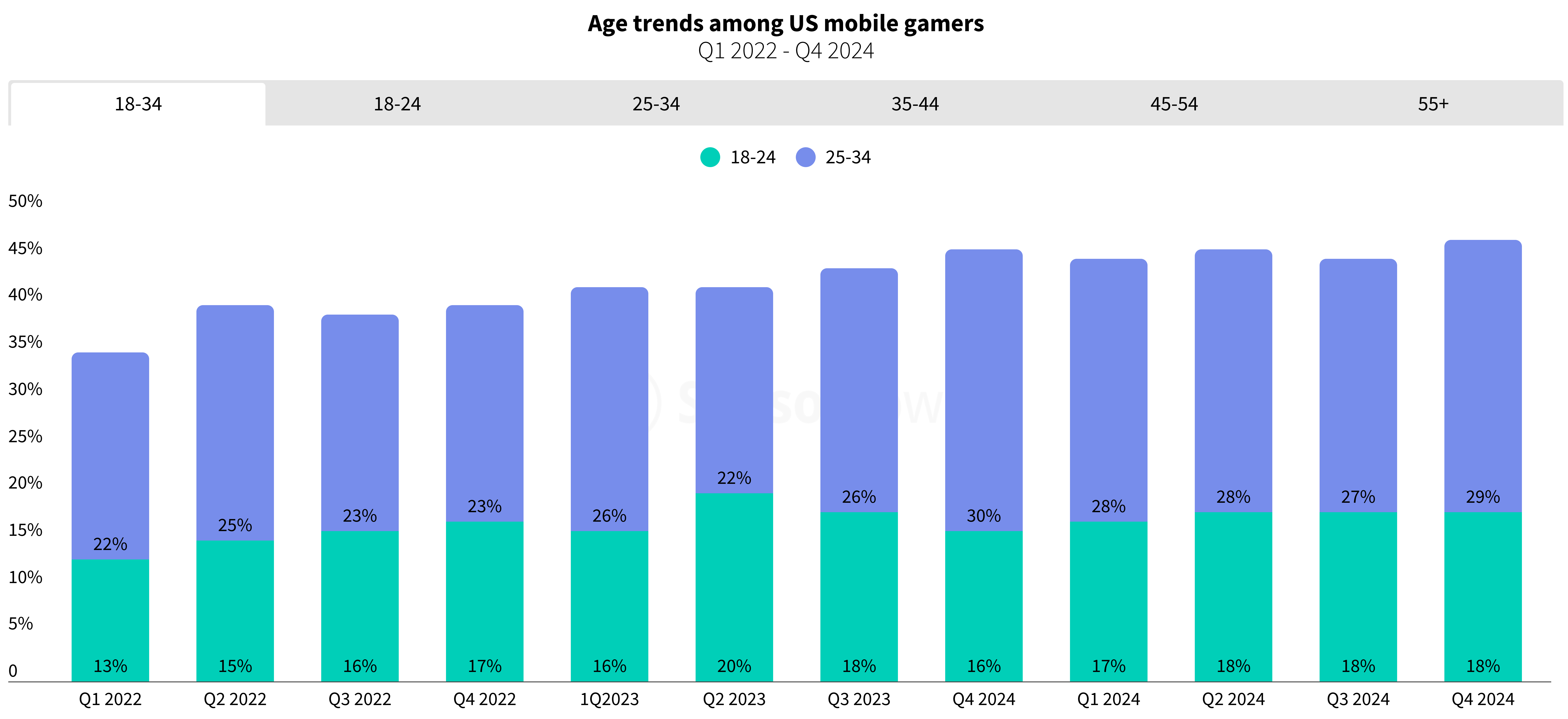


#1 Game By IAP Revenue

- MONOPOLY GO!
- Last War:Survival Game
- Dungeon & Fighter Mobile
- Honor of Kings
- Love and Deepspace
- Monster Strike
- Genshin Impact
- Honkai: Star Rail
- GODDESS OF VICTORY: NIKKE
- Lineage M

US mobile gamers audience trend younger.

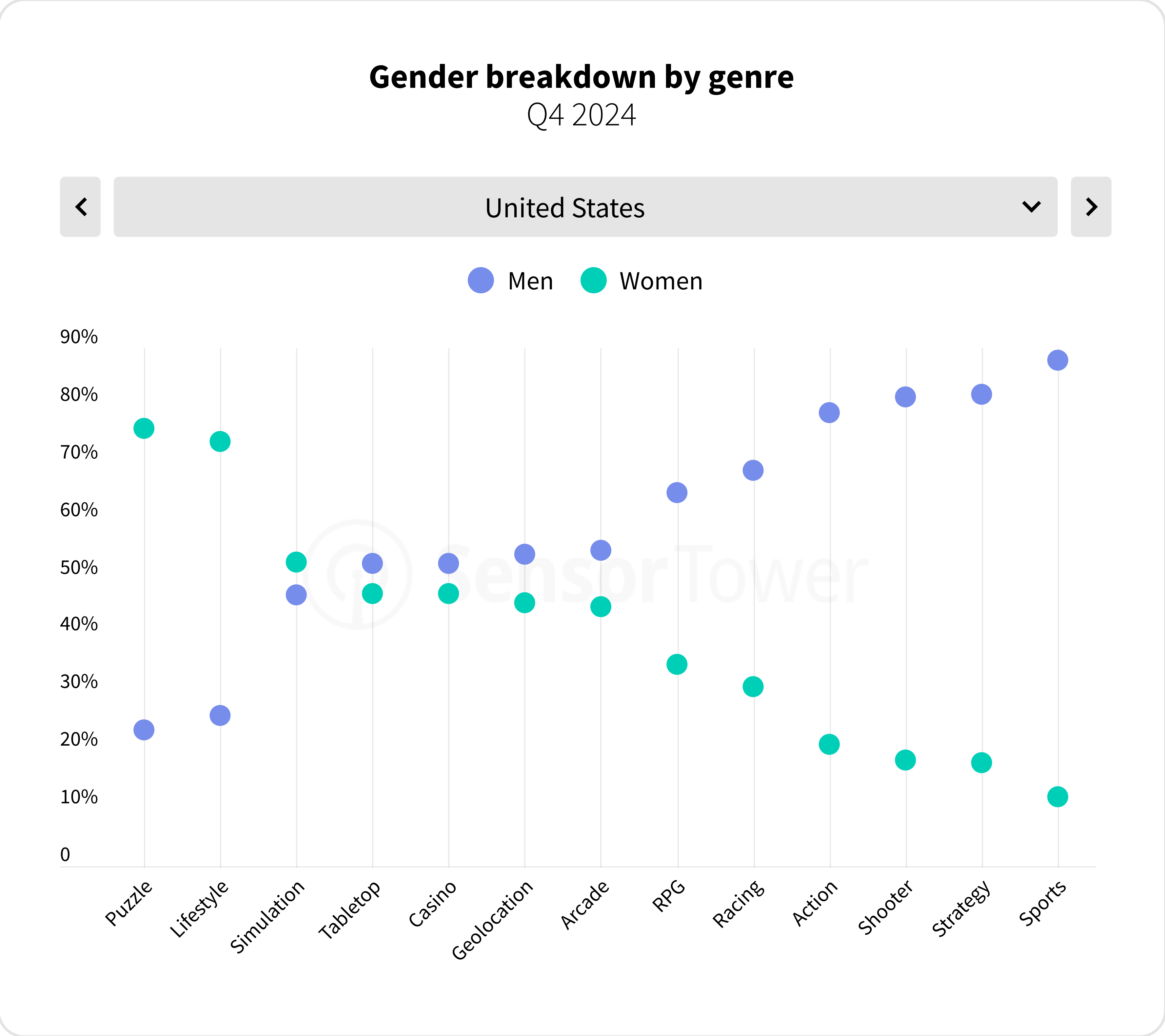
Source: Sensor Tower Audience Insights

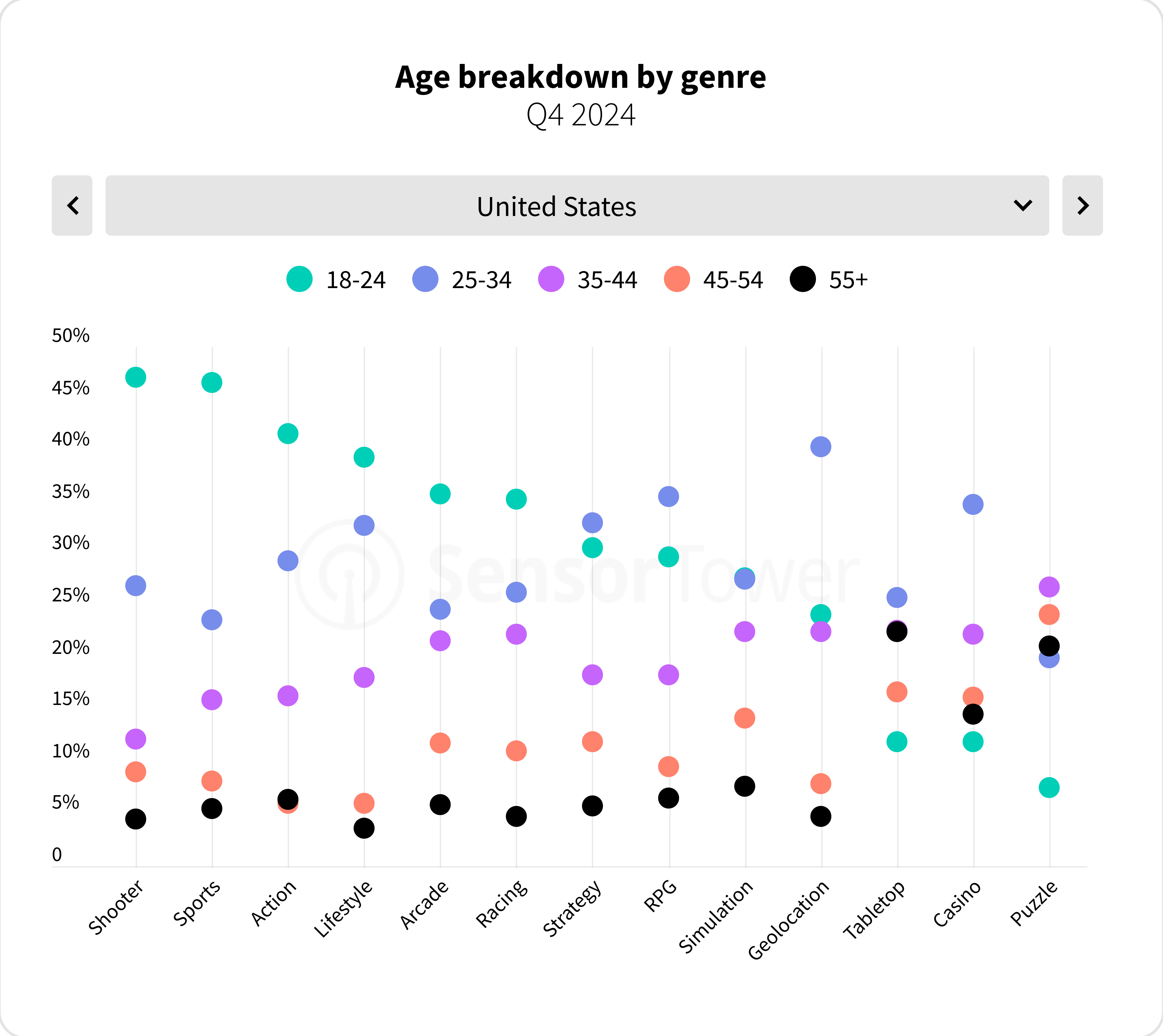


Mobile Gaming Macro Trends

Puzzle and Lifestyle skew towards women, Shooters and Sports skew younger.

Source: Sensor Tower Audience Insights





State of Mobile Gaming 2025

Male gamers tend to love gambling and crypto, female gamers tend to love fashion and shopping.

Source: Sensor Tower Audience Insights

Below compares men and women who play mobile games vs general app audience.
Top genres are the genres each demographic spends more time (as a percentage, not gross) vs the general population. Personas are groups of users grouped by activity. Top personas are the personas each demographic are most likely to fall into vs the general population.

United States | Japan | South Korea | Germany | United Kingdom

Male gamers
Q4 2024

18-24

	Top genres	Top personas (non-gaming)
1	Sports	Digital Socialites
2	Action	Students
3	Racing	Sneakerheads

25-34

	Top genres	Top personas (non-gaming)
1	Card	Digital Daters
2	Strategy	LGBTQ+ Daters
3	Role Playing	Sports Fans

35-44

	Top genres	Top personas (non-gaming)
1	Casino	Crypto Traders
2	Strategy	Sports Fans
3	Board	Hotel Hoppers

45-54

	Top genres	Top personas (non-gaming)
1	Casino	Crypto Traders
2	Trivia	Peer-to-peer Payers
3	Strategy	Wholesale Shoppers

Female gamers
Q4 2024

18-24

	Top genres	Top personas (non-gaming)
1	Music	Manga & Anime Lovers
2	Adventure	Students
3	Simulation	Fashionistas

25-34

	Top genres	Top personas (non-gaming)
1	Puzzle	Mental Health Enthusiasts
2	Simulation	Fashionistas
3	Casual	Latte Lovers

35-44

	Top genres	Top personas (non-gaming)
1	Puzzle	Home Cooks
2	Casual	Shopaholics
3	Word	Wholesale Shoppers

45-54

	Top genres	Top personas (non-gaming)
1	Puzzle	Shopaholics
2	Casino	Hotel Hoppers
3	Word	Home Cooks

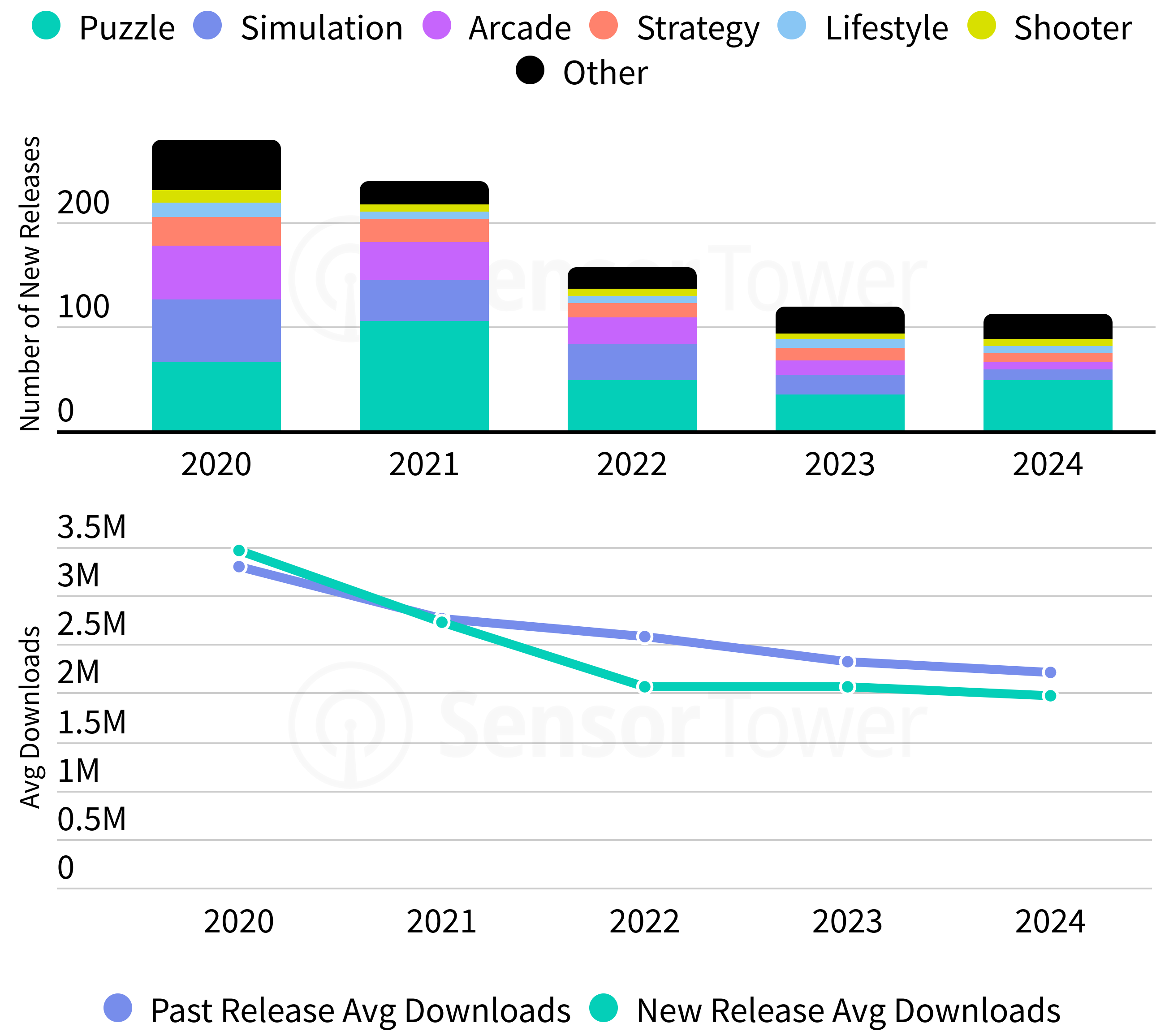
Fewer new games among top rankings highlight a notable shift towards core genres.

The number of new mobile game releases among the top 1,000 in the US has steadily declined since 2020, dropping from more than 200 to just above 100 in 2024. Despite this reduction, average downloads per game have remained stable at 1–2 million, highlighting a shift toward quality over quantity. Mid-core and core titles, including Shooters like Call of Duty: Warzone Mobile and MOBA newcomer Squad Busters, have seen strong adoption. Meanwhile, enduring hits such as Roblox and Subway Surfers continue to deliver significant download volumes. Additionally, Strategy and Lifestyle games are gaining momentum, creating new opportunities for innovation in niche categories.

Source: Sensor Tower Note: iOS and Google Play combined. iOS only for China. Excludes third-party Android. Apps classified using Sensor Tower's taxonomy as of January 5, 2025.

Number of new games released per year & average downloads per game among top 1,000 games by downloads

United States



Top New Releases by Downloads

	2020	2021	2022	2023	2024
1	Tangle Master 3D (Sort)	Bridge Race (Arcade Racing)	Fill The Fridge (Ultracasual)	MONOPOLY GO! (Coin Looters)	Pokémon TCG Pocket (Card Battler)
2	Cube Surfer (Platformer / Runner)	Paper Fold (Other Puzzle)	Tall Man Run (Platformer / Runner)	Burger Please (Idler)	Call of Duty: Warzone (Battle Royale)
3	Draw Climber (Arcade Racing)	Count Masters (Platformer / Runner)	Apex Legends (Battle Royale)	Whiteout Survival (4X Strategy)	Perfect Tidy (Ultracasual)
4	Spiral Roll (Platformer / Runner)	Hair Challenge (Platformer / Runner)	Crowd Evolution (Platformer / Runner)	Honkai: Star Rail (Turn-based RPG)	Squad Busters (MOBA)
5	Scribble Rider (Arcade Racing)	Crash Bandicoot: On the Run (Platformer / Runner)	Diablo Immortal (MMORPG)	Twisted Tangle (Sort)	Screw Puzzle: Wood Nut & Bolt (Physics)

Top Past Releases by Downloads

	2020	2021	2022	2023	2024
1	Among Us! (Social Party)	ROBLOX (Sandbox)	ROBLOX (Sandbox)	ROBLOX (Sandbox)	Block Blast Adventure Master (Block)
2	ROBLOX (Sandbox)	Project Makeover (Match Swap)	Subway Surfers (Platformer / Runner)	Royal Match (Match Swap)	ROBLOX (Sandbox)
3	Call of Duty: Mobile (FPS / 3PS)	Among Us! (Social Party)	Wordle by Goldfinch Studios (Word)	Subway Surfers (Platformer / Runner)	MONOPOLY GO! (Coin Looters)
4	Subway Surfers (Platformer / Runner)	High Heels (Platformer / Runner)	Stumble Guys (Platformer / Runner)	Block Blast Adventure Master (Block)	Township (Tycoon / Crafting)
5	Brain Test: Tricky Puzzles (Riddle)	Subway Surfers (Platformer / Runner)	Count Masters (Platformer / Runner)	Magic Tiles 3 (Music / Rhythm)	Last War:Survival Game (4X Strategy)

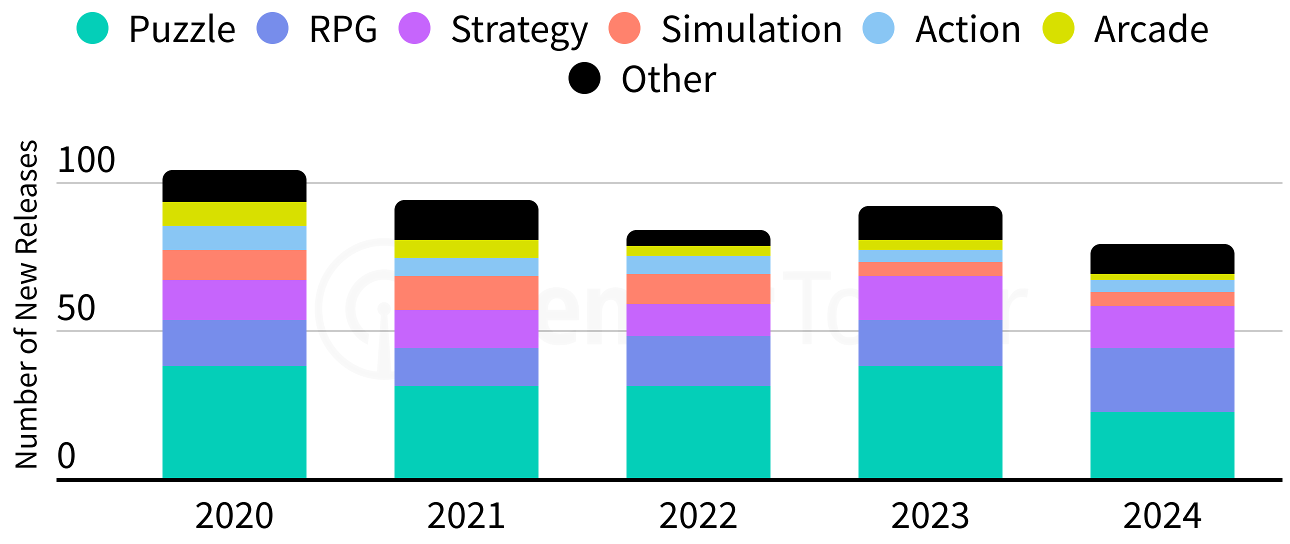
Stable new releases in the US highlight strong performance in RPG and strategy genres.

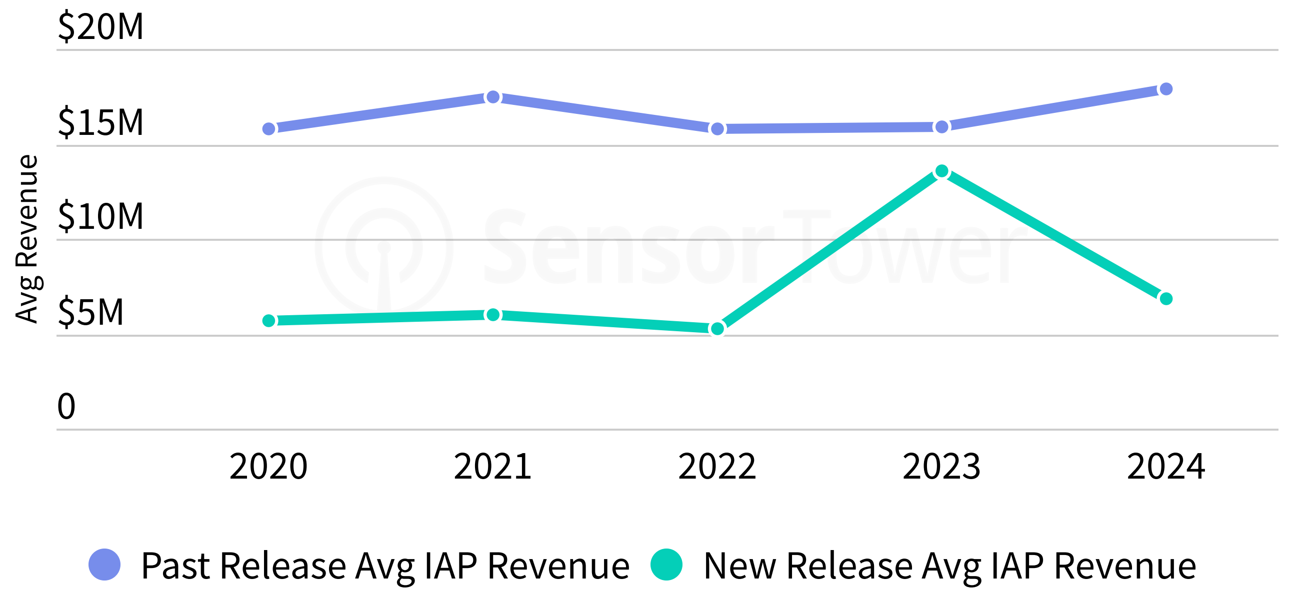
In the United States, the number of new mobile games among the top 1,000 by revenue remained stable, with RPG and Strategy genres leading the charge. New hits like Pokémon TCG Pocket and Sea of Conquest drove notable consumer spend, while RPGs such as AFK Journey and Top Heroes delivered strong and consistent revenues. Meanwhile, established Puzzle games like Royal Match and Candy Crush Saga continued to excel in monetization, showcasing their lasting appeal and ability to engage loyal players. The rising average consumer spend per game in 2023 highlights the growing success of high-quality new releases, supported by enduring hits like MONOPOLY GO! and Whiteout Survival, which sustained strong engagement and revenue growth throughout the year.

Source: Sensor Tower. Note: iOS and Google Play combined. iOS only for China. Revenue is gross — inclusive of any percent taken by the app stores. Apps classified using Sensor Tower's Game taxonomy as of January 5, 2025.

Number of new games released per year & average revenue per game among top 1,000 games by IAP revenue

United States





Top New Releases by IAP Revenue

	2020	2021	2022	2023	2024
1	The Seven Deadly Sins: Hikari to Yami no Grand Cross (Squad RPG)	Royal Match (Match Swap)	Diablo Immortal (MMORPG)	MONOPOLY GO! (Coin Looters)	Pokémon TCG Pocket (Card Battler)
2	Genshin Impact (Open World Adventure)	Cookie Run: Kingdom (Squad RPG)	Dislyte (Squad RPG)	Whiteout Survival (4X Strategy)	AFK Journey (Squad RPG)
3	MLB Tap Sports Baseball 2020 (Realistic Sports)	MLB Tap Sports Baseball 2021 (Realistic Sports)	Survivor!.io (Shoot 'em Up)	Honkai: Star Rail (Turn-based RPG)	Sea of Conquest (Other Strategy)
4	Redecor (Customization)	My Hero Academia: Strongest Hero (Action RPG)	GODDESS OF VICTORY: NIKKE (Squad RPG)	Call of Dragons (4X Strategy)	Top Heroes (Squad RPG)
5	Arknights (Tower Defense)	Family Farm Adventure (Tycoon / Crafting)	MLB Tap Sports Baseball 2022 (Realistic Sports)	Street Fighter: Duel (Squad RPG)	Love and Deepspace (Interactive Story)

Top Past Releases by Downloads

	2020	2021	2022	2023	2024
1	ROBLOX (Sandbox)	ROBLOX (Sandbox)	Candy Crush Saga (Match Swap)	Candy Crush Saga (Match Swap)	MONOPOLY GO! (Coin Looters)
2	Candy Crush Saga (Match Swap)	Candy Crush Saga (Match Swap)	ROBLOX (Sandbox)	Royal Match (Match Swap)	Royal Match (Match Swap)
3	Coin Master (Coin Looters)	Coin Master (Coin Looters)	Coin Master (Coin Looters)	ROBLOX (Sandbox)	ROBLOX (Sandbox)
4	Pokémon GO (Geolocation)	Free Fire (Battle Royale)	Royal Match (Match Swap)	Coin Master (Coin Looters)	Candy Crush Saga (Match Swap)
	Gardenscapes by Playrix	Pokémon GO	Pokémon GO	Pokémon GO	Last War:Survival

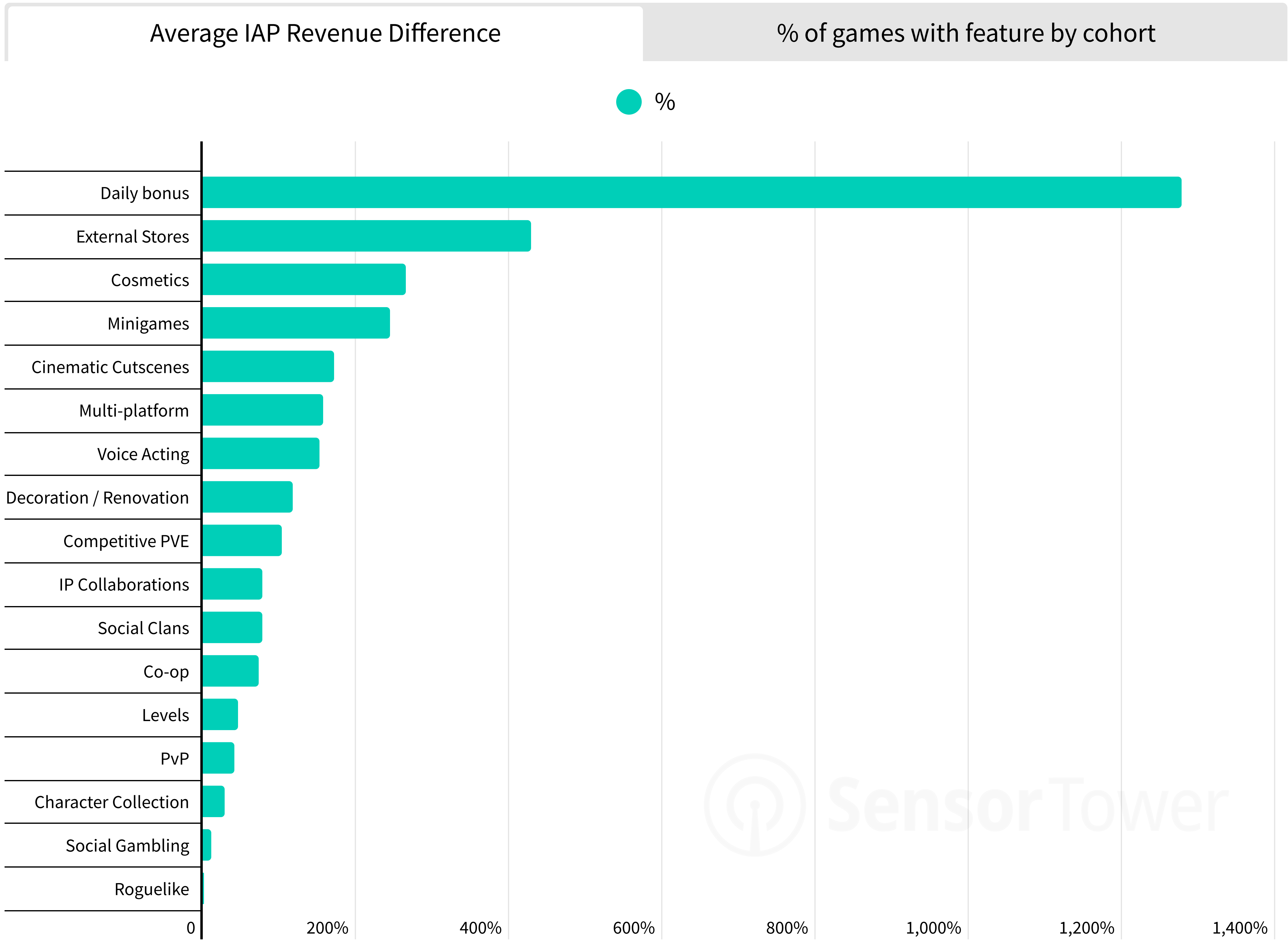
Daily bonus is the lowest hanging fruit feature.

Among the top 1000 games by in-app purchase revenue, the average game with a daily bonus brought in 12x revenue than the average game lacking this feature. It is likely that the daily bonus feature is a marker for games with some degree of live operations, which tend to bring in more in-app purchase revenue.

External stores, often on the web, allow players to make purchases outside of the app. These stores tend to be added to the highest grossing games, with mid to lower range games often missing one.

Cosmetics are a premiere monetization feature for games that support them, and minigames can give a game variety, boosting engagement and retention, which contributes to revenue in the longer term.

Sensor Tower game IQ tag breakdown
Top 1000 games by in-app purchase revenue
Worldwide, App Store and Google Play



Source: Sensor Tower
Note: iOS and Google Play combined. iOS only for China. Excludes third-party Android.
Average IAP revenue difference calculated by comparing the average 2024 IAP revenue of games with tag and without tag. Ex. Games with daily bonus tag on average drove 12x more IAP revenue than games without the tag.

02

Winners of 2024

At Scopely, we are driven by a culture of iteration and innovation - known as a 'Learning Machine' - that empowers us to constantly analyze data, apply insights across our portfolio, and quickly pivot where needed. Sensor Tower plays a key role in fueling our 'learning machine' by helping us deeply understand the market and stay ahead of the curve in such a rapidly changing industry.

SCOPELY

Jessica Zestar-Postrk
SVP Strategy & Business Operations
Scopely

Winners of 2024

MONOPOLY GO! cracks the bank in 2024.

Scopely's 2023 release MONOPOLY GO! became the biggest game in the world by in-app purchase revenue in 2024. The game combines the universally appealing MONOPOLY board game intellectual property with a gameplay loop pioneered in the Casino genre.

Tencent's Honor of Kings saw a decline year over year, but still holds onto the #2 spot after five consecutive years at #1. Honor of Kings is a multiplayer online battle arena (MOBA) most popular in China.

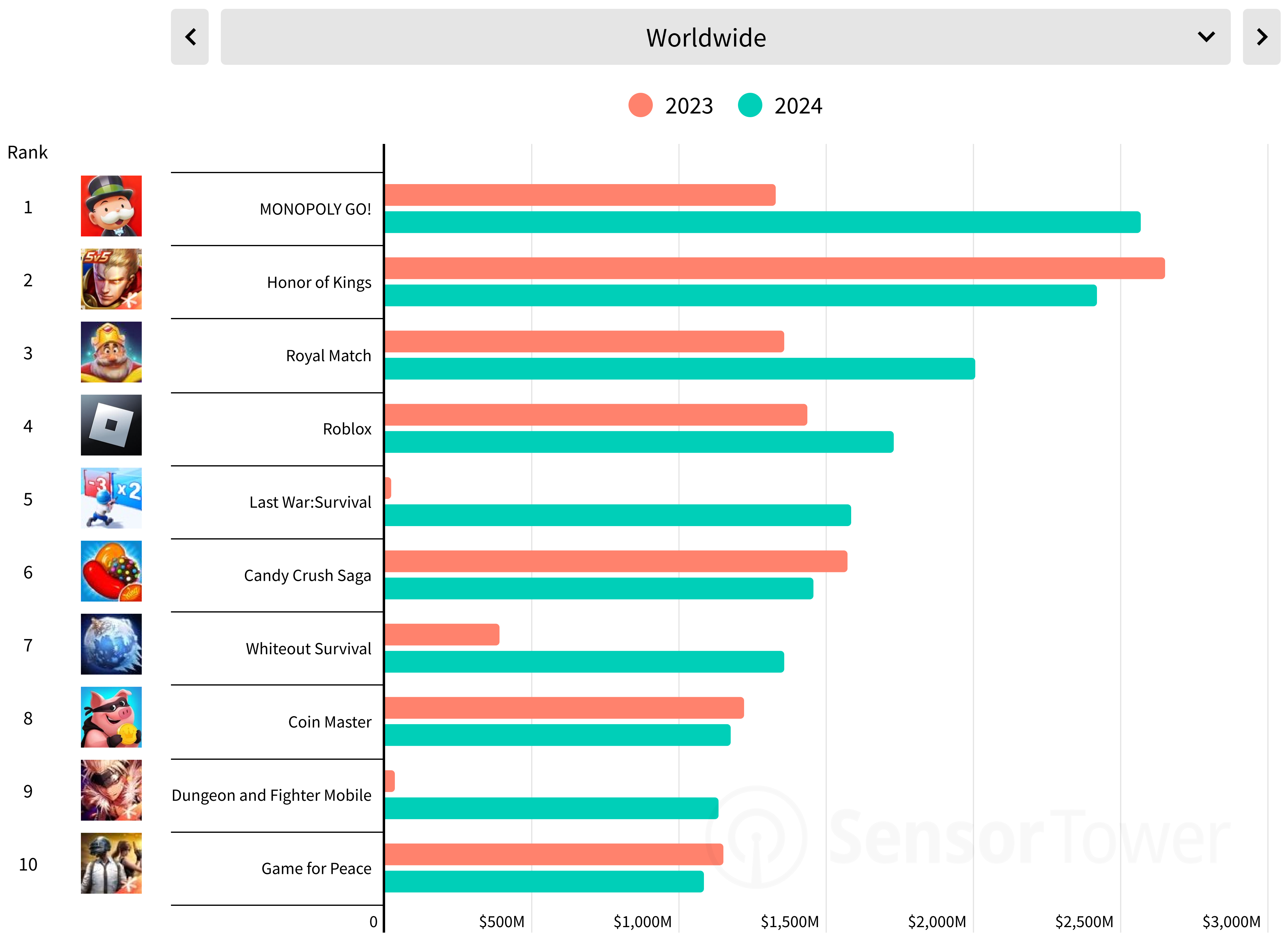
Royal Match and Roblox are two games with powerful live ops models that allowed them to show strong growth year over year despite being on the market for years. Roblox also has a massive presence on platforms outside of mobile, unlike the other games on this list.

Last War: Survival and Whiteout Survival are the breakout games of 2024 and are discussed further in a later slide.

Candy Crush Saga and Coin Master saw declines when compared to direct competitors Royal Match and MONOPOLY GO! respectively, but both remain top 10 games.

Game For Peace, the Chinese oriented version of PUBG: Mobile, was the sole Shooter in the top ten this year.

Top 10 games
by in-app purchase revenue



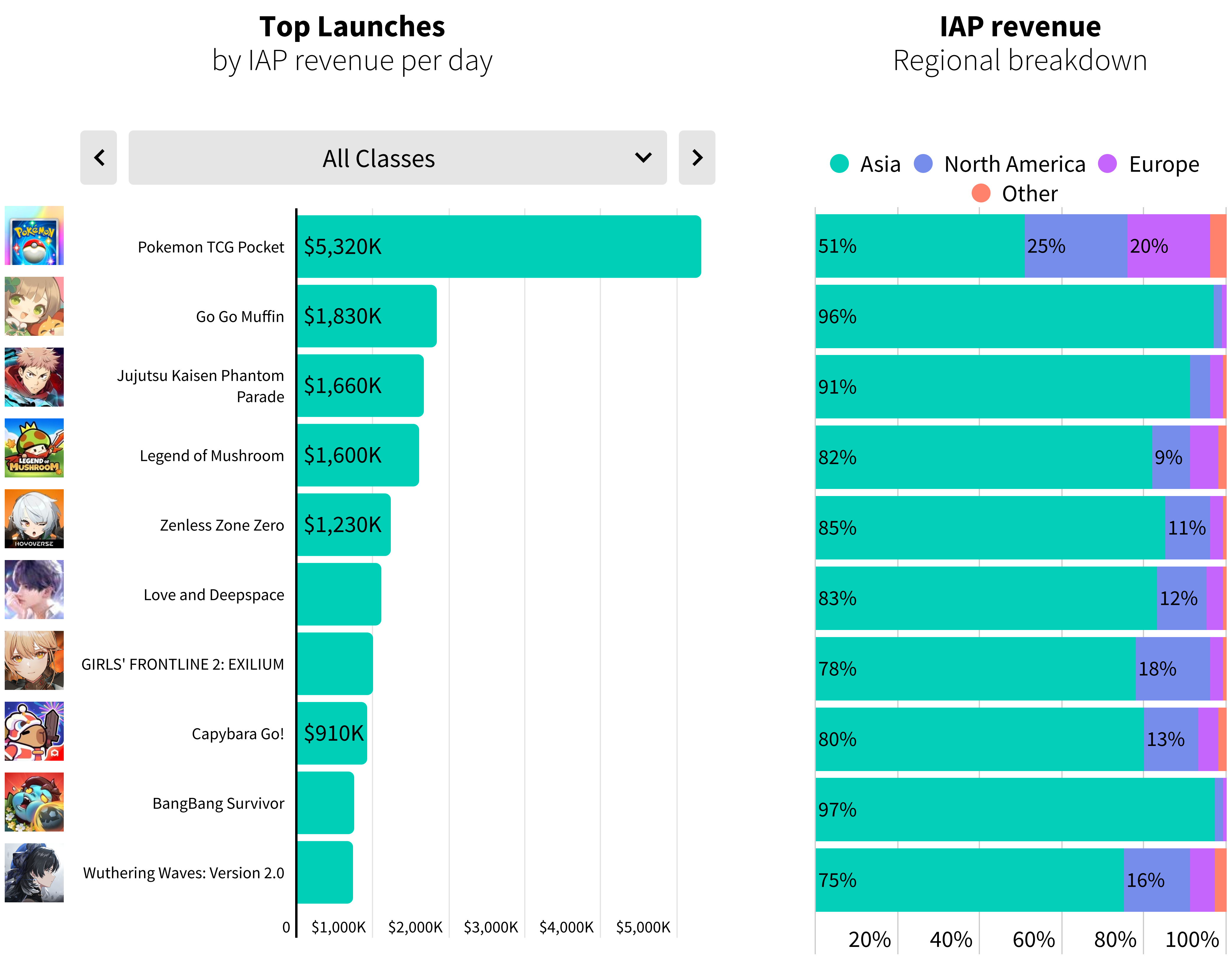
Source: Sensor Tower
Note: iOS and Google Play combined. iOS only for China. Revenue is gross — inclusive of any percent taken by the app stores.

Winners of 2024

Pokemon TCG Pocket is the launch of the year.

Pokemon TCG Pocket was by far the strongest launch of the year, meteorically rising up to be one of the biggest games in the world. It uses the Pokemon intellectual property, specifically for Pokemon cards, to draw in players with a strong nostalgia appeal. Then, in a world where most mobile games are chock full of features incentivizing players to spend as much time in them as possible, Pokemon TCG Pocket seemingly gives players permission to log in once or twice per day for free packs, then log right back out. Pokemon TCG Pocket successfully competed for consumer spend without targeting consumer time spent as directly.

Pokemon TCG Pocket was also the only launch to achieve strong international success. Most other successful launches were Asia oriented, though several, like GIRLS' FRONTLINE 2: EXILIUM and Wuthering Waves made strong in-roads in the West.



Source: Sensor Tower
Note: iOS and Google Play combined. iOS only for China. Revenue is gross — inclusive of any percent taken by the app stores.

Winners of 2024

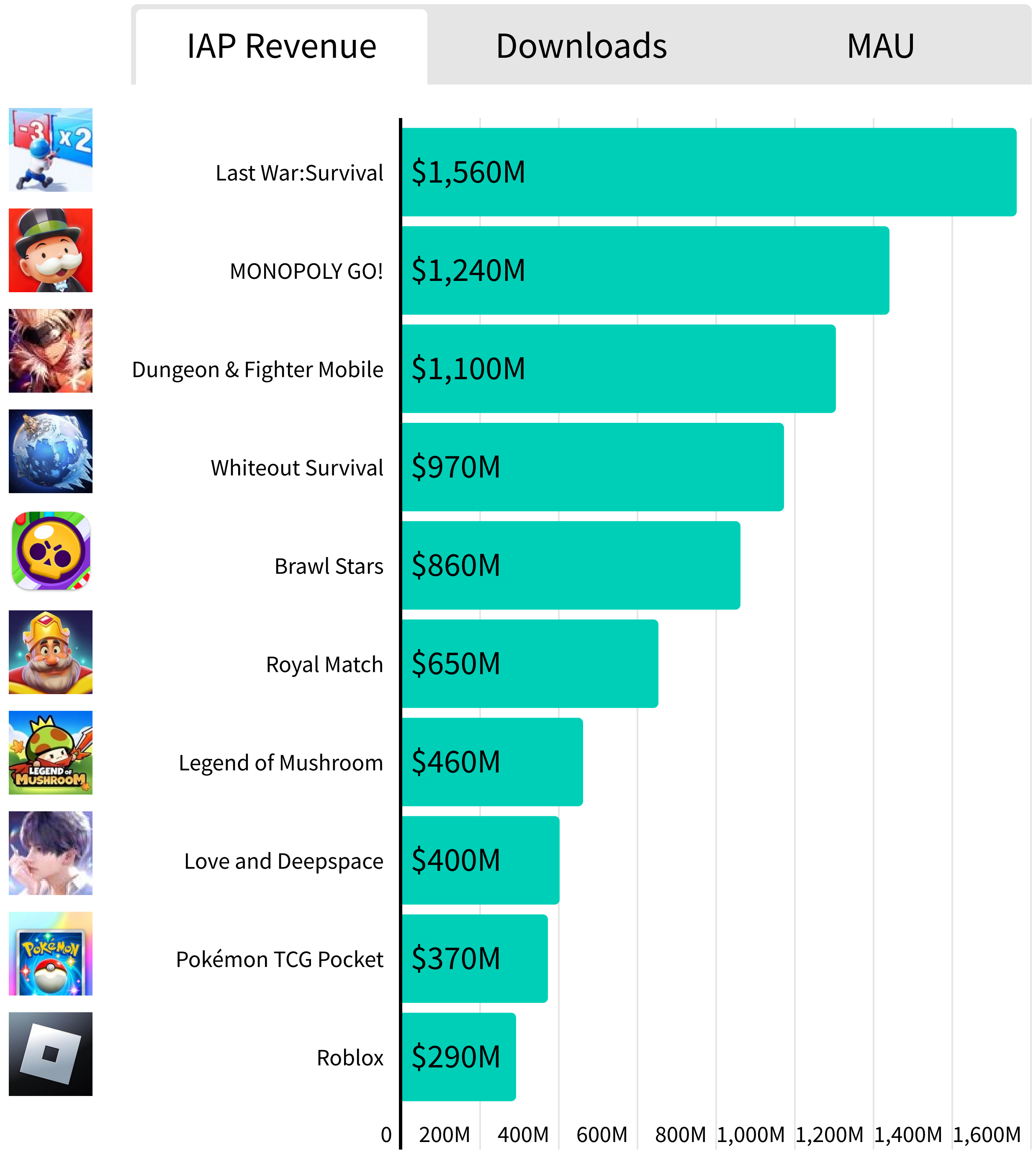
Last War: Survival is the breakout mobile game of 2024.

The biggest gains this year were made by games launched in 2023 with strong user acquisition strategies. Last War: Survival and Whiteout Survival combine in-depth 4X Strategy progression and gameplay with hypercasual style ad creatives and simplified first-time user experience flows that allow them to target and retain a wider audience. Both games saw massive success in the West and East.

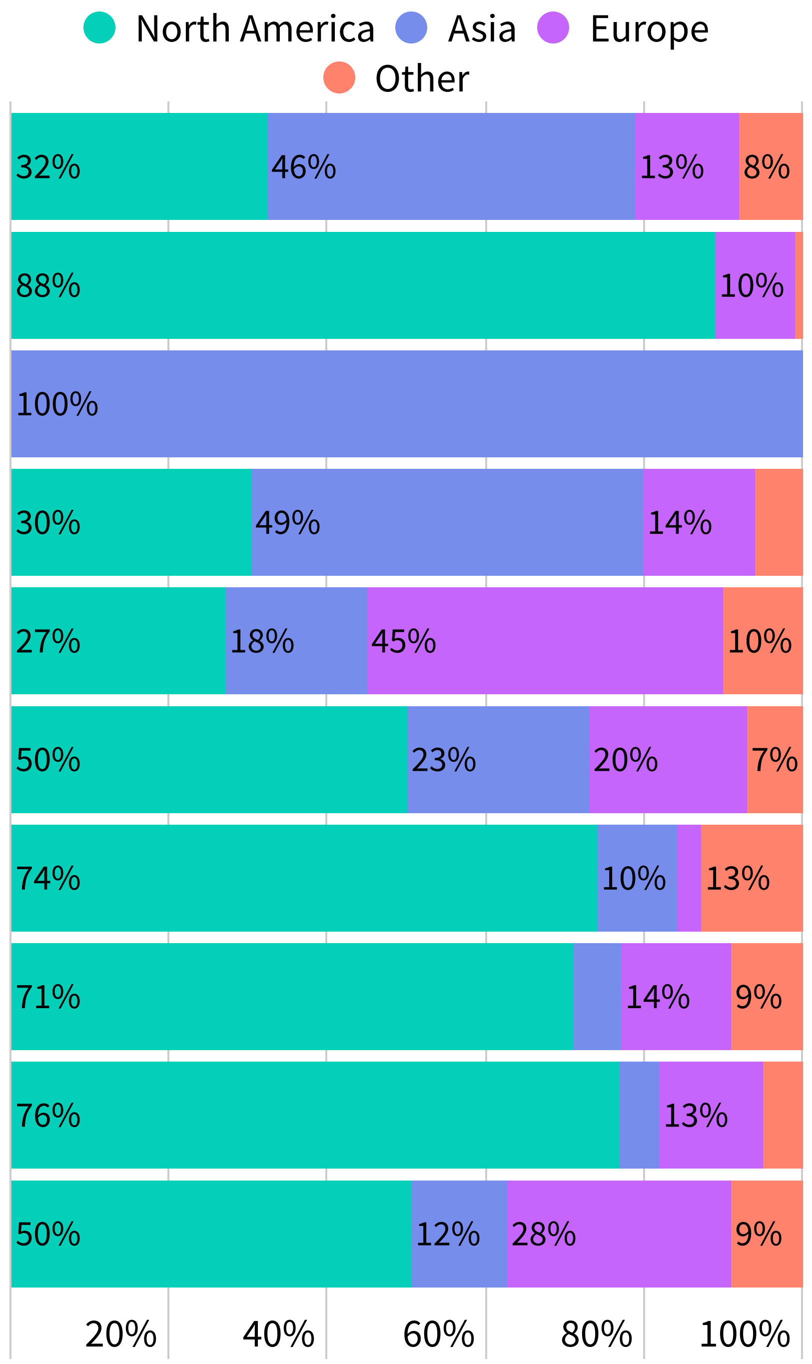
MONOPOLY GO! and Dungeon and Fighter Mobile both took full advantage of their intellectual properties to target and monetize existing audiences.

Brawl Stars saw a breakout year fueled by an overhaul to their live ops and incredibly successful collaborations with brands like Spongebob Squarepants and Godzilla. Brawl Stars was the only game on this list to see the largest portion of their in-app purchase growth come from Europe.

Top 2024 Games
by YoY growth



YoY Growth
Regional breakdown



Source: Sensor Tower
Note: iOS and Google Play combined. iOS only for China. Revenue is gross — inclusive of any percent taken by the app stores.

Winners of 2024

Tencent, Scopely, Dream see significant growth in 2024.

Tencent remained the largest game publisher in the world and in Asia by in-app purchase revenue in 2024, seeing significant growth thanks to the release of Dungeon & Fighter Mobile in China, which is now Tencent's #2 game by in-app purchase revenue. Honor of Kings remains Tencent's #1 game and the undisputed king of mid-core games. Supercell

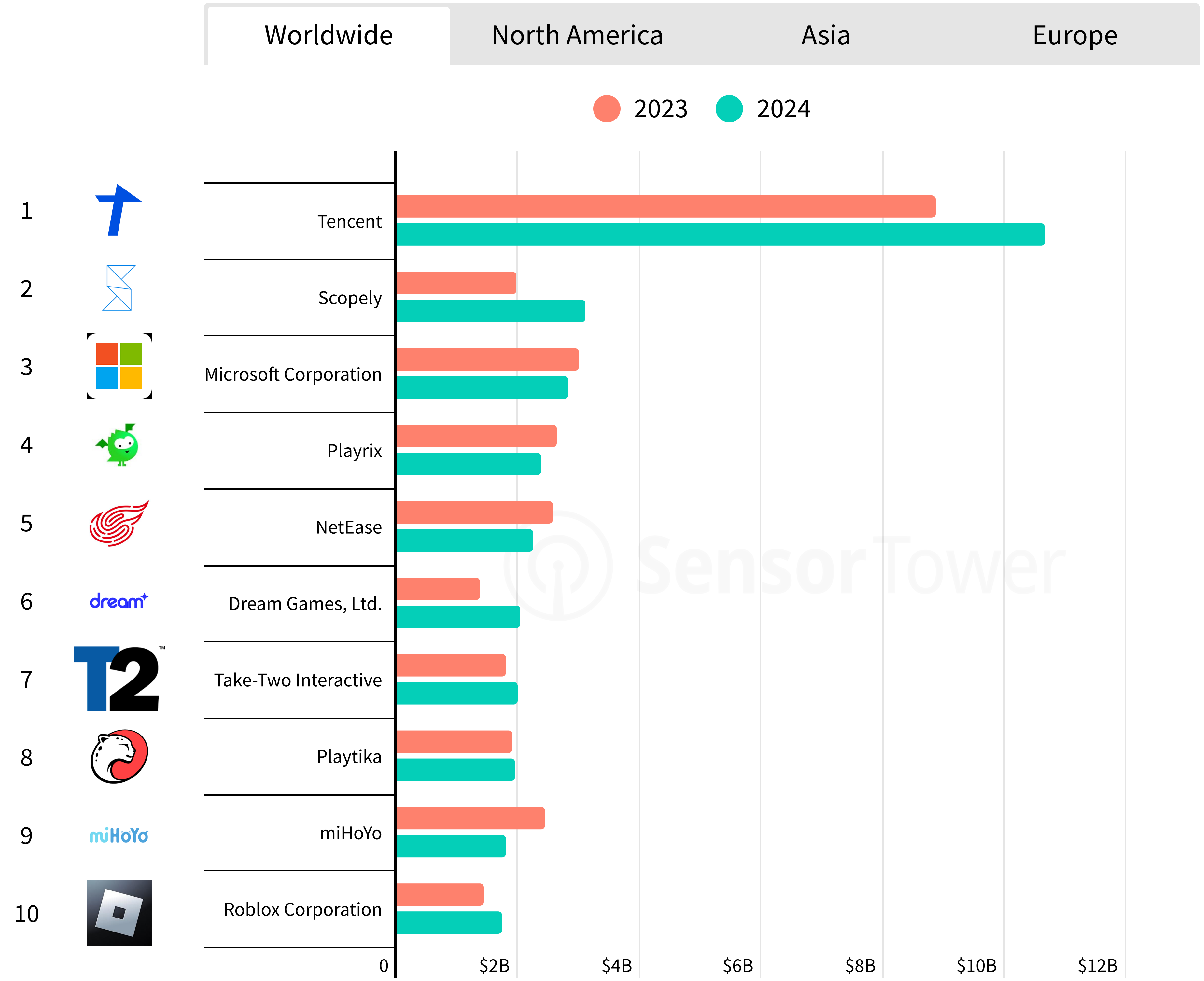
Scopely came in at #2 worldwide and #1 in North America, overtaking multiple other publishers thanks to MONOPOLY GO!. MONOPOLY GO! made up 83% of Scopely's in-app purchase revenue in 2024.

Supercell, counted under Tencent, also had a watershed year, with Brawl Stars skyrocketing in virtually every metric. Supercell alone is now the biggest publisher by Europe in-app purchase revenue. While Squad Busters didn't immediately top the charts, Supercell has proven their continued ability to grow their titles with Brawl Stars. Clash of Clans and Clash Royale remain titans of their sub-genres several years post launch. Supercell is now the #1 publisher in Europe.

Dream Games' Royal Match continued to dominate the behemoth Puzzle genre with significant growth. Dream Games' new launch Royal Kingdom didn't immediately break any charts, but Royal Match also started off more humbly before growing to its current heights.

Source: Sensor Tower
Note: iOS and Google Play combined. iOS only for China. Revenue is gross — inclusive of any percent taken by the app stores.

Top game publishers
In-app purchase revenue from games



Winners of 2024

Four Games Joined the Billion Dollar Club in 2024

Last War, Whiteout Survival, Dungeon & Fighter, and Brawl Stars were the latest games to reach the billion dollar club — that is, surpassing $1 billion in global consumer spend for a calendar year. This was the most apps to reach the milestone for the first time since 2021 and reflects how the mobile games market is beginning to bounce back.

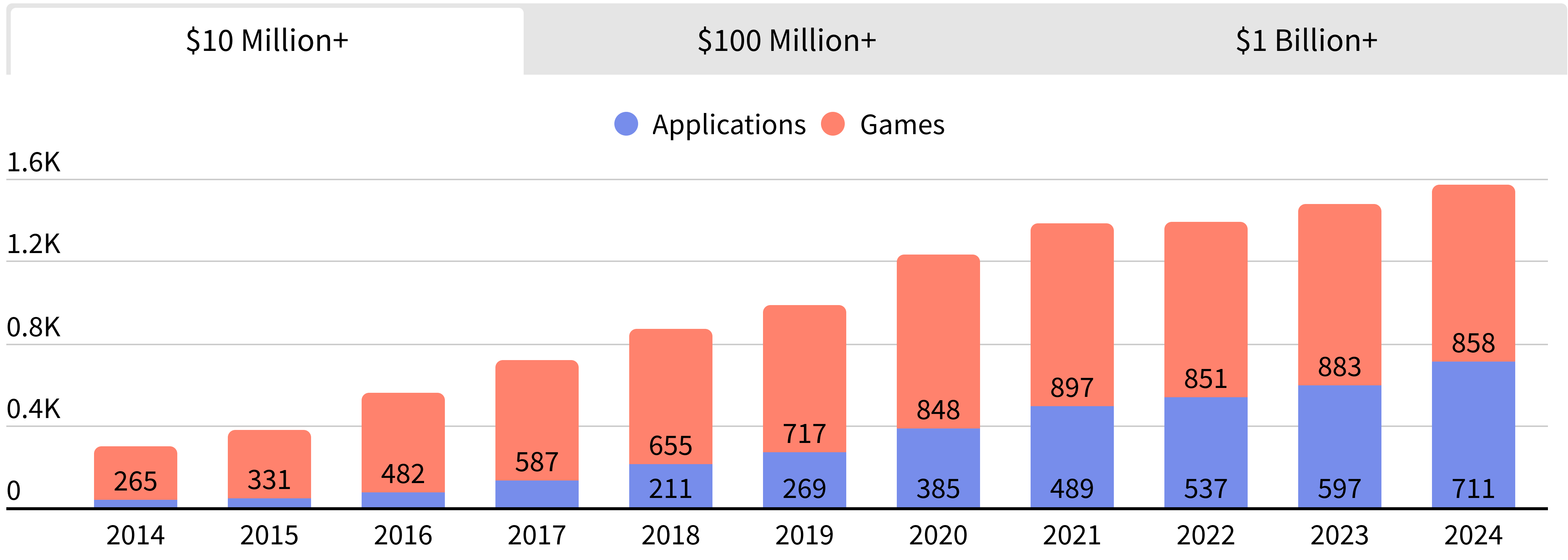
Interestingly, while the non-game market continues to flourish, no non-game app has surpassed $1 billion for the first time in a year since Google One in 2022. Two streaming services fell just short: Max and Tencent Video.

In total, 16 apps reached the billion dollar milestone in 2024, including five non-games and a record-high 11 games. And while the number of games reaching the $100 million and $10 million milestones for annual consumer spend have held fairly steady in recent years, improving revenue opportunities for non-games have caused the number of apps to reach these thresholds to steadily climb, offsetting recent declines in the number of games hitting the marks.

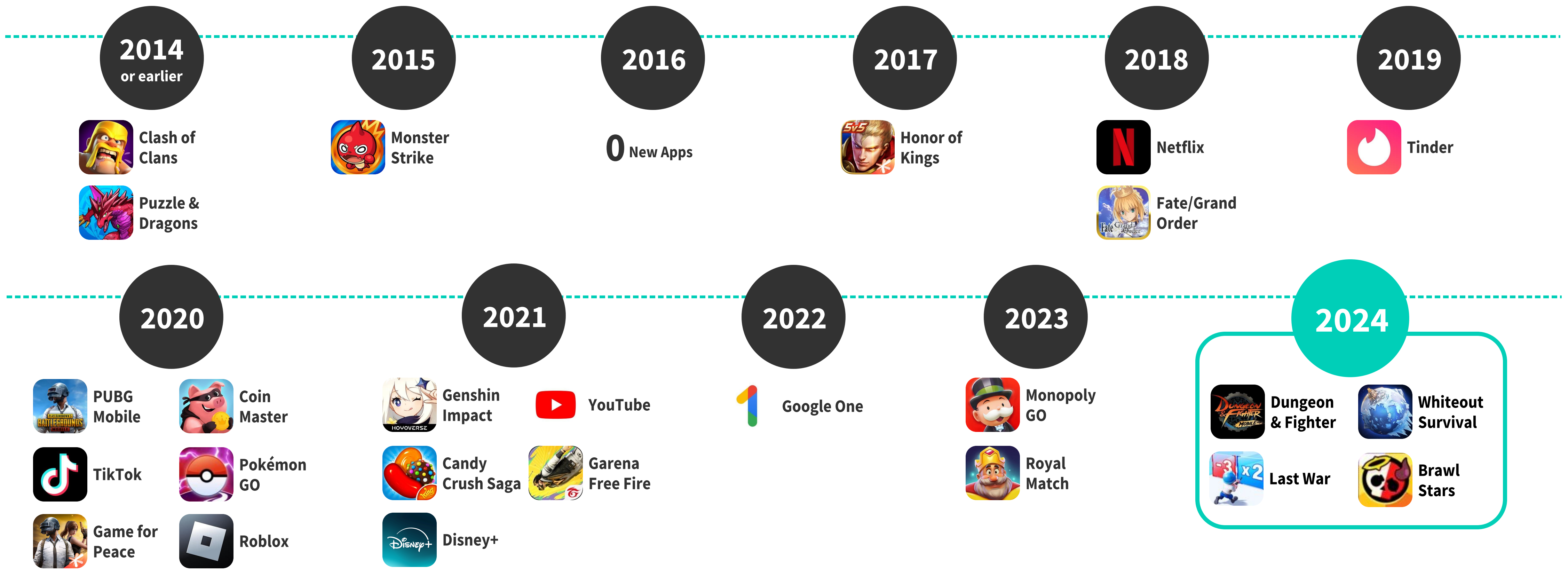
Explore the Full List of Leaders in 2024
Sensor Tower customers can explore the full list of Top Apps in 2024, by category, market, and device. Please note that the Sensor Tower platform shows *net revenue*, excluding any percent taken by the app stores.

Source: Sensor Tower
Note: iOS and Google Play combined. iOS only for China. Spend is gross — inclusive of any percent taken by the app stores. Includes estimates since the start of 2014.

Number of apps surpassing annual global consumer spend



Apps to reach $1 billion in annual global consumer spend for the first time



Winners of 2024

Monopoly drives growth in board game IPs.

Sensor Tower's intellectual property (IP) tags identify games that leverage an existing brand outside of video games as well as video game IPs that have a presence outside of video games.

Monopoly was the big winner in IP this year, seeing the most growth and driving significant in-app purchase revenue growth for board game IPs in mobile games. It also solidified its spot as the #1 IP by mobile game in-app purchase revenue, thanks to MONOPOLY GO!. MONOPOLY GO! also drove Hasbro to be the #2 IP Corporate Parent by mobile game in-app purchase revenue, as the owner of Monopoly, and Scopely to be the #2 Publisher by IP mobile game revenue.

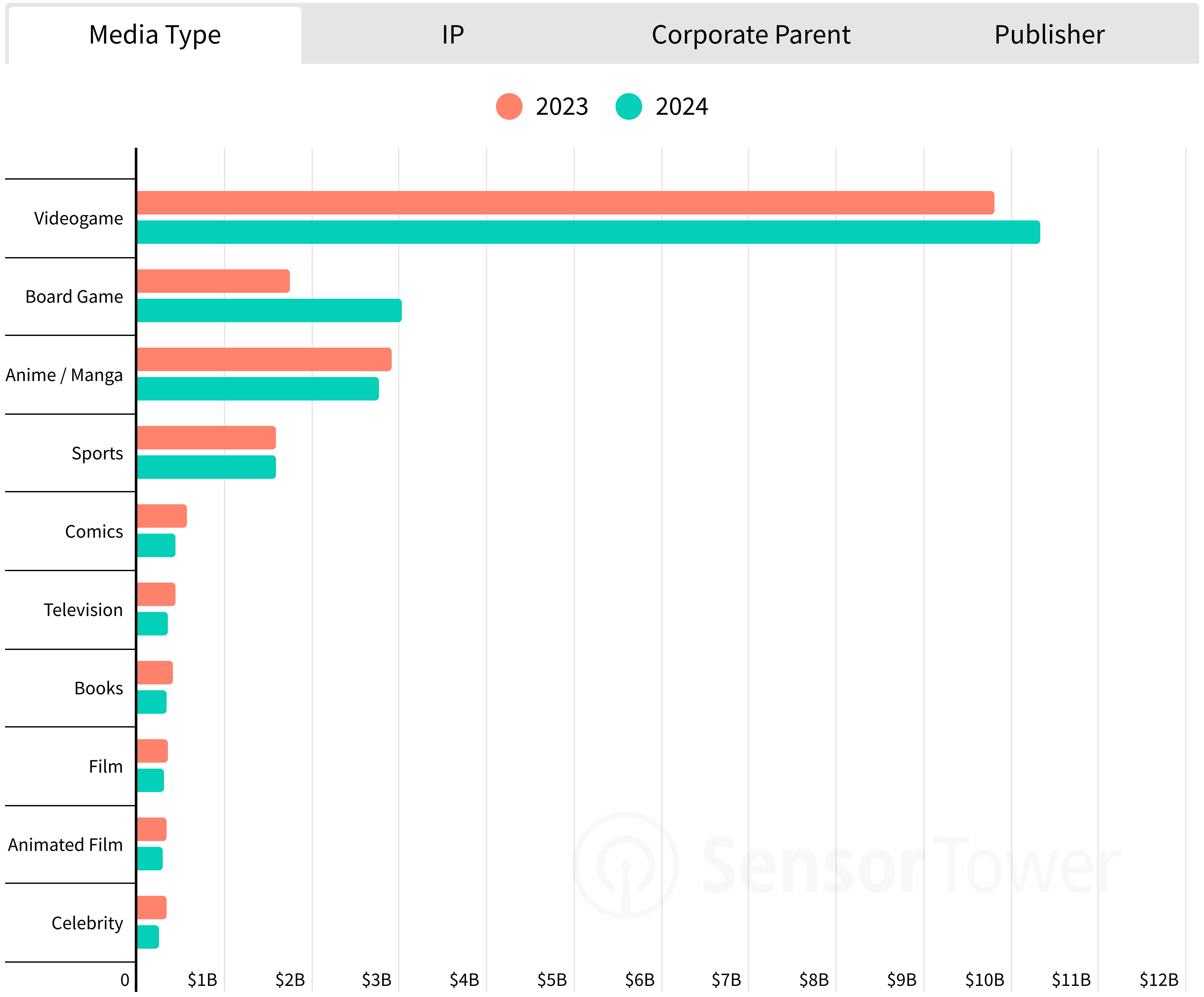
The #1 Corporate Parent and Publisher was Tencent, thanks to Honor of Kings and League of Legends, whose Netflix show Arcane saw a massive season 2 release in 2024 as well.

Pokemon was the #3 IP and Nintendo was the #3 Corporate Parent, driven by Pokemon Go and Pokemon TCG Pocket. Geolocation game specialist Niantic also has Pokemon Go to thank for its position as the #4 IP mobile game publisher, though it also has successful IP games Monster Hunter Now and Dragon Quest Walk in its portfolio.

Nexon is the breakout IP Corporate Parent of 2024 thanks to the launch of Dungeon & Fighter Mobile in China.

Source: Sensor Tower
Note: iOS and Google Play combined. iOS only for China. Spend is gross — inclusive of any percent taken by the app stores.

Top 10 by IP mobile gaming IAP revenue



03 Mobile Game Marketing

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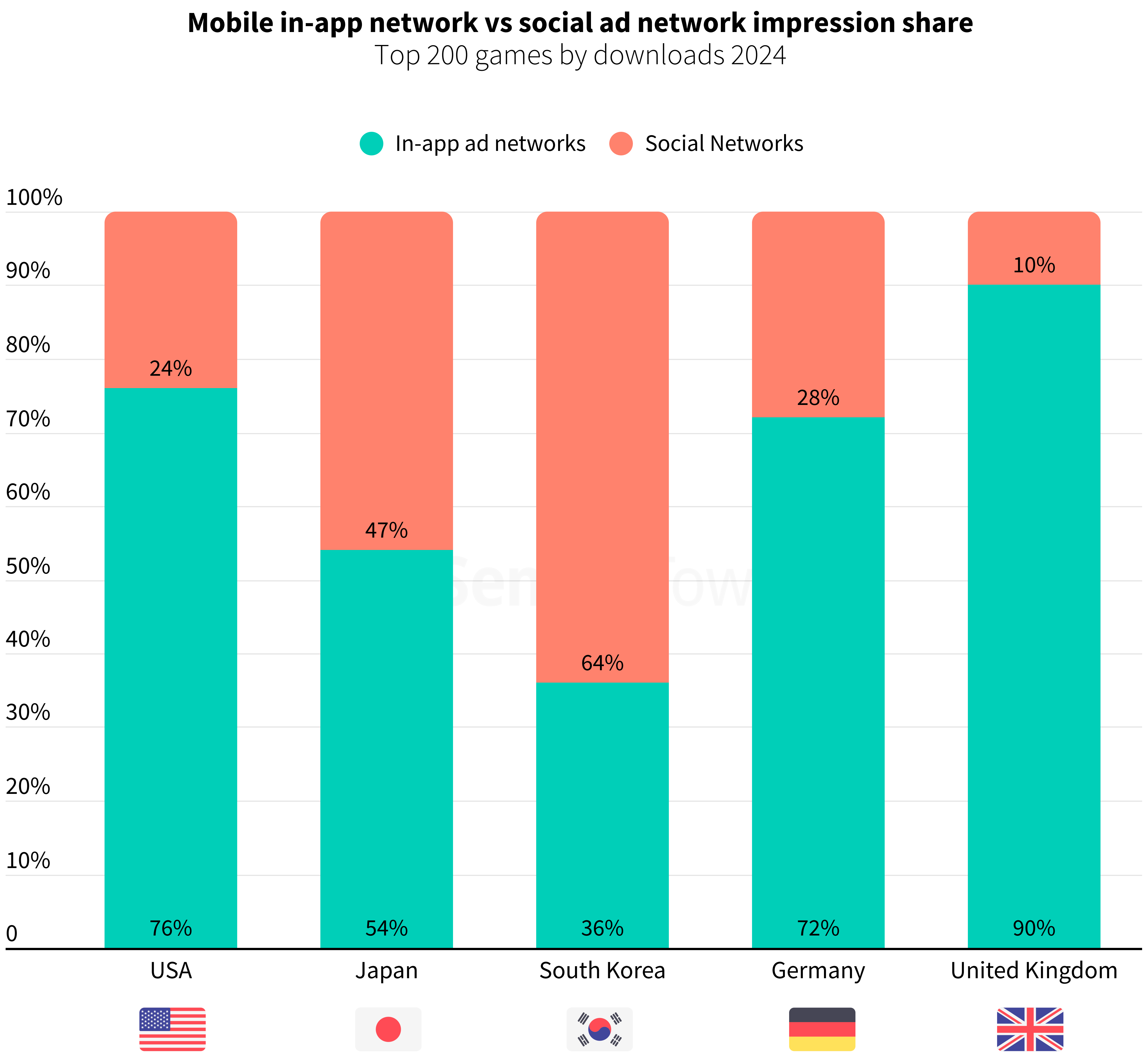
In the fast-paced gaming ecosystem, understanding the competitive landscape is key to success. Sensor Tower empowers us to uncover creative trends, analyze competitors' strategies, and monitor market dynamics. Whether launching a new title or optimizing an existing one, it provides invaluable insights to evaluate performance, amplify strengths, and unlock new growth opportunities.

Viktoriya Ivanova
UA Lead
Wargaming

Mobile in-app ad networks take over mobile gaming ad distribution in key western markets.

In 2024, the mobile gaming landscape experienced some shifts in advertising strategies across key countries. Impressions distribution in mobile in-app ad networks continues to dominate western markets like the US, UK and Germany with diversification of networks distribution. While Japan and Korea's ads distribution is more concentrated in social networks particularly on Instagram.



Source: Sensor Tower
Note: iOS and Google Play combined.

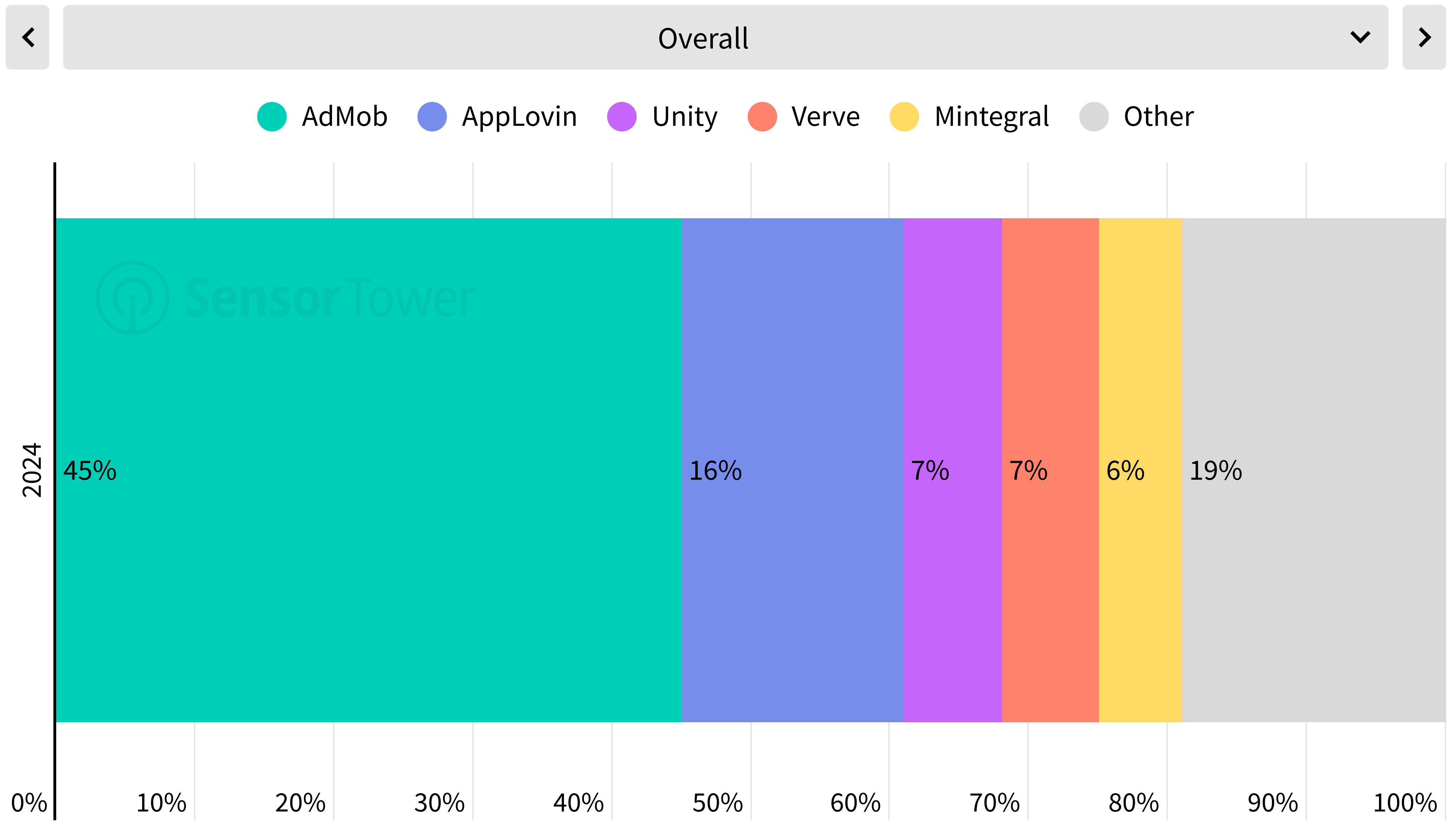
AppLovin saw the most mobile gaming ad distribution growth in 2024 among in-app ad networks.

Zooming in on the mobile in-app advertising side, we see an obvious effort in diversification amongst ad networks. Amid privacy changes, the evolving user acquisition strategies, and shifting market dynamics, multiple players are gaining ground in the distribution space against established networks.

AdMob, still dominating the ad distribution, faced substantial declines, notably in Germany (-56%) and Japan (-49%), hinting at a strategic reallocation of budgets toward alternative platforms. In contrast, AppLovin saw explosive growth in impression share across all key countries notably in the US with +398% growth, reinforcing its role in hybrid casual and mid-core game monetization.

Source: Sensor Tower
Note: iOS and Google Play combined.
"Overall" combines US, Japan, South Korea, Germany and the UK.

Mobile in-app ad network impression share
Top 200 games by downloads 2024

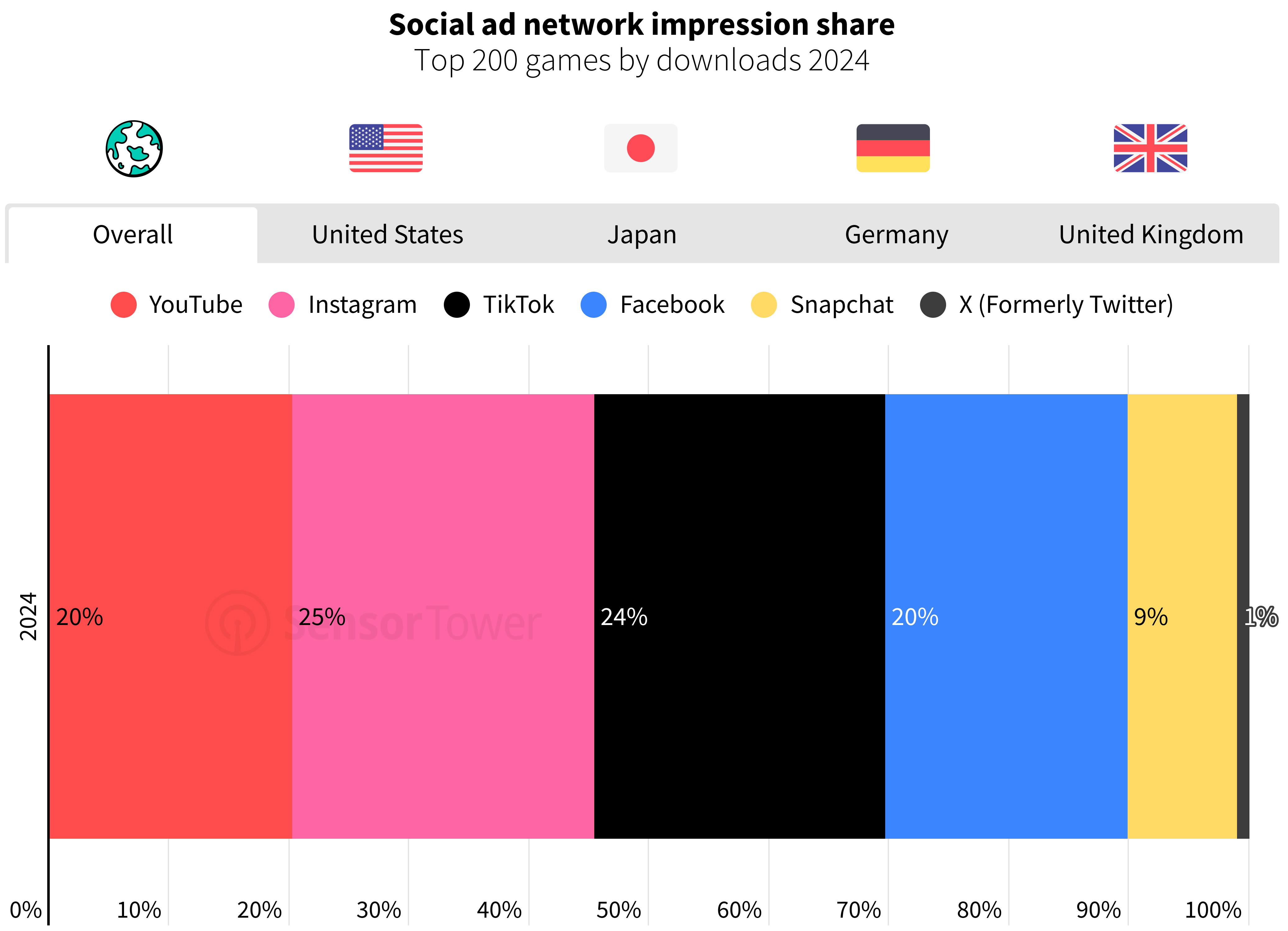


+398%

AppLovin mobile game ad impression share growth amongst mobile in-app ad networks 2024 over 2023

TikTok saw the most mobile gaming ad distribution growth in 2024 among social ad networks.

On Social networks TikTok is gaining significant momentum. TikTok has surged at an astonishing 67% YoY growth, increasing its share from 14% to 24% particularly for games targeting younger, highly engaged audiences. Snapchat's US presence is mostly driven by the mid-core gaming genre notably Roblox and Clash of Clans.



+67%

TikTok mobile game ad impression share growth among social ad networks, 2024 over 2023

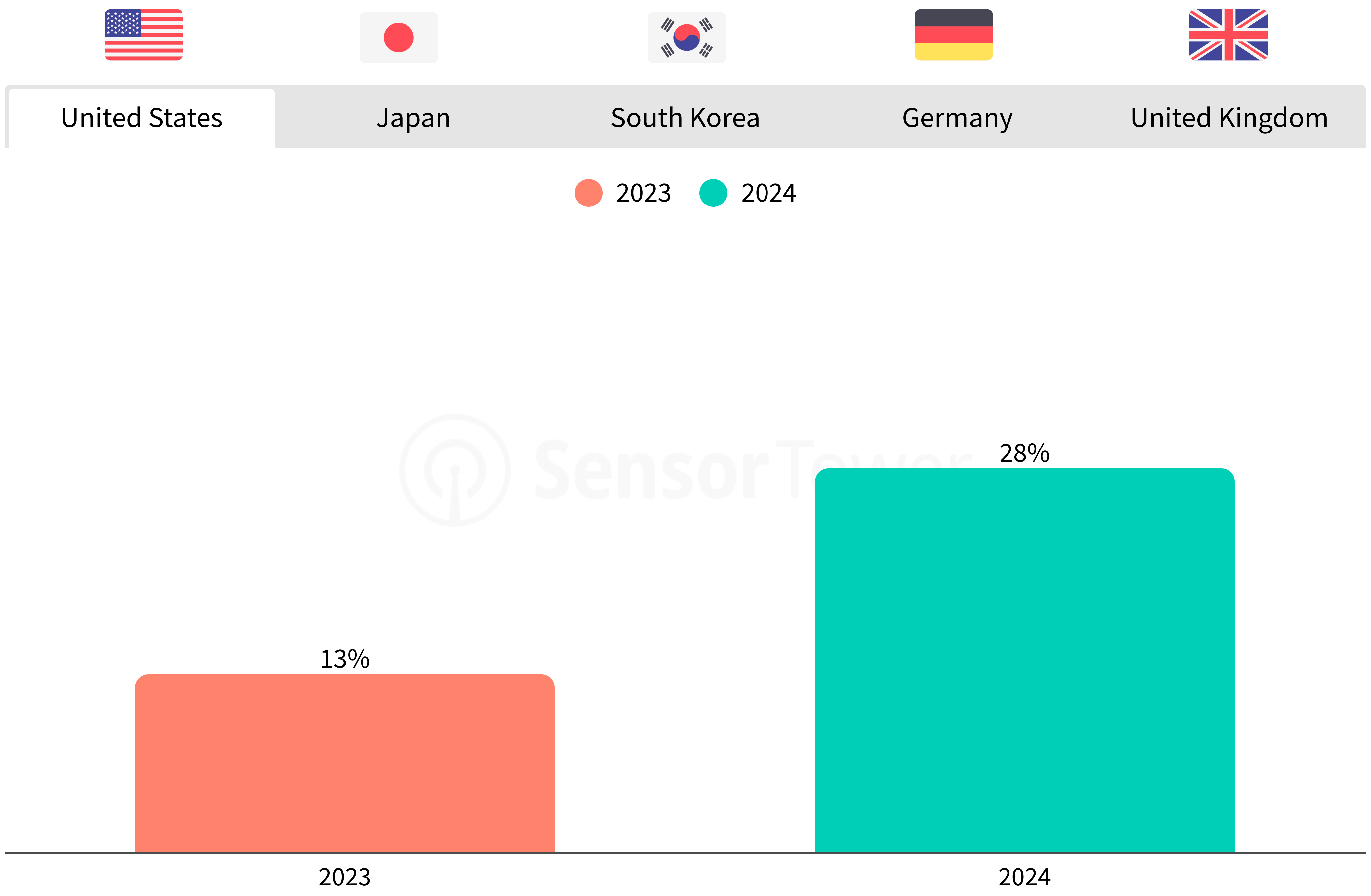
Source: Sensor Tower
Note: iOS and Google Play combined., Snapchat is US only, X (Formerly Twitter) is Japan only

Reels are now a mainstay placement.

The adoption of reels saw a surge across all key countries eating share from feed placements. The growth is prominent across all product models with a notable mention for Hybrid and Hypercasual models where Reels is the top adopted placement officially in 2024 and now constitute 41% and 47% respectively.

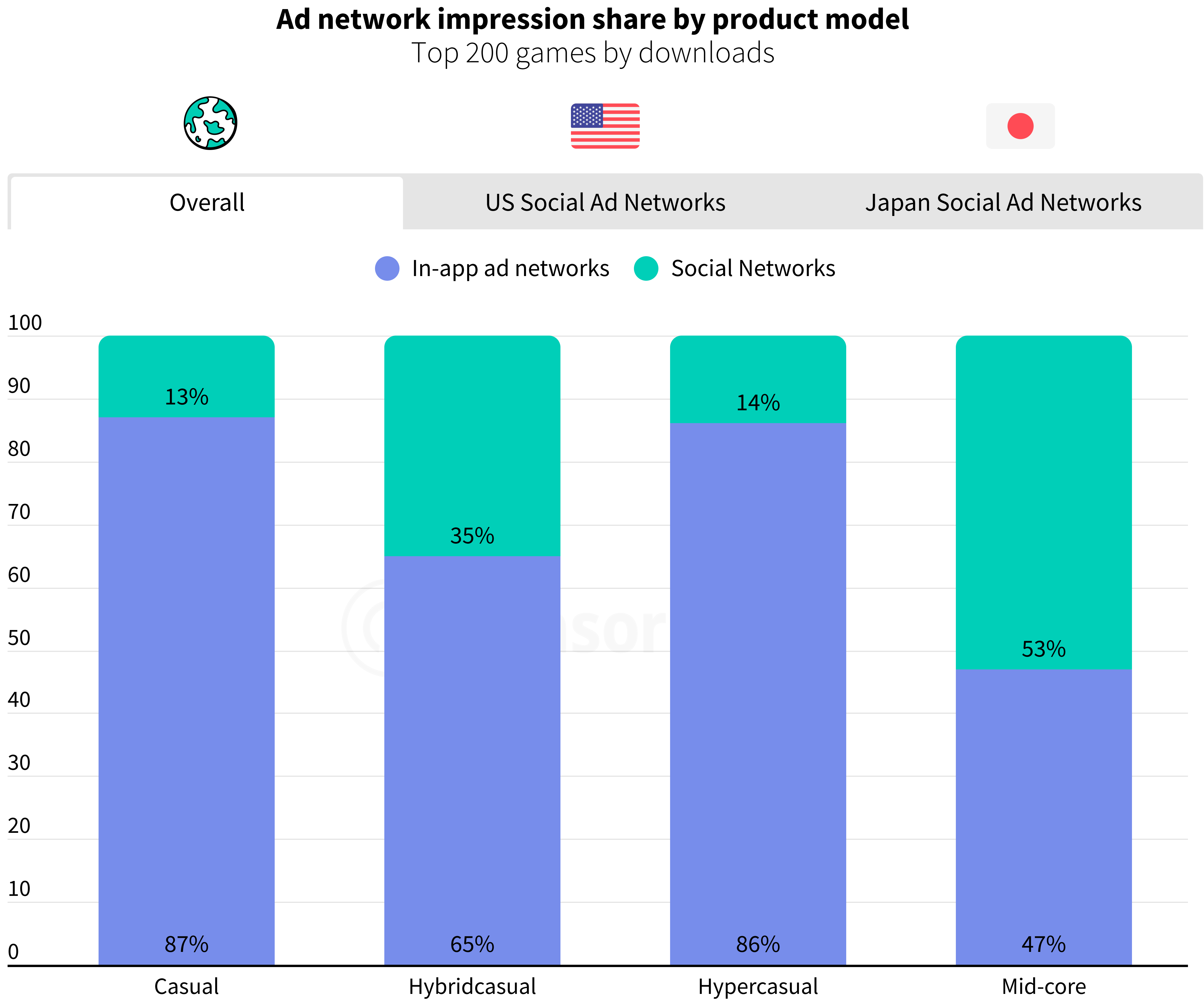
Source: Sensor Tower
Note: iOS and Google Play combined., Snapchat is US only, X (Formerly Twitter) is Japan only

Reel impression share
Top 200 games by regional downloads
Facebook, Instagram, Snapchat, TikTok, YouTube



Mid-core games utilize social networks more than other product models.

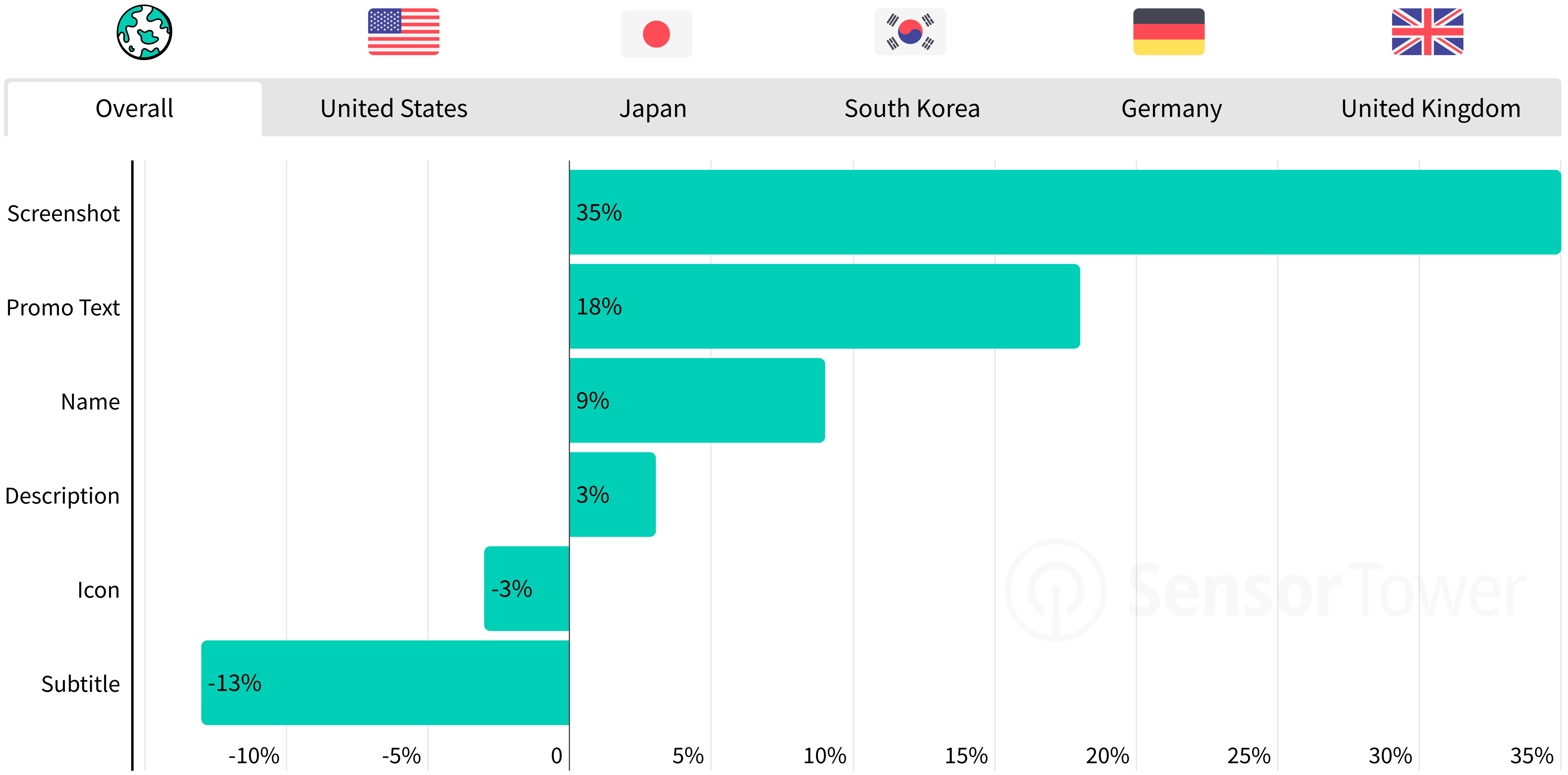
Midcore genres have shifted the ad distribution drastically to Social media networks with an 84% increase year over year landing it at 58% of impression share across key countries. All other genres maintain a consistently high mobile app ad networks impression share.



Source: Sensor Tower
Note: iOS and Google Play combined.
Overall includes US, Japan, South Korea, Germany, and the. UK.

Screenshots and promo text store page updates saw more focus in 2024.

Count of iOS updates by type, YoY Growth
Top 100 games by iOS IAP revenue



Source: Sensor Tower
"Overall" refers to USA, Japan, South Korea, Germany, and UK combined.

Competitor name and genres are the most common App Store keywords chosen by top mobile games.

App Store English keywords count
Top 100 games by worldwide unified revenue

United States | Japan | South Korea | Germany | United Kingdom

Source: Sensor Tower

Games appealed to existing audiences via celebrities, brands, and intellectual properties.

With recent privacy changes, targeting audiences has become more expensive, leading publishers to lean on existing audiences. Hiring a household name celebrity to star in ad creative or collaborating with an S-tier intellectual property or brand for an in-app event allows games to effectively reach their audiences and brand themselves as premium. Alternatively, games with innate IPs had an innate advantage in attracting new players. The top grossing mobile game of the year, MONOPOLY GO!, and the launch of the year, Pokemon TCG Pocket, both took full advantage of their intellectual properties' existing audiences, playing up recognizable elements in all of their ad creative. MONOPOLY GO! went a step further, collaborating with other intellectual properties like Marvel in in-app events.

Brawl Stars - #2 Ad Creative
by US YouTube share of voice 3Q2024

Source: Sensor Tower

Pokemon TCG Pocket - #8 Ad Creative
by US AdMob share of voice December 2024

Source: Sensor Tower

MONOPOLY GO! - #8 Ad Creative
by US AdMob share of voice, December 2024

Source: Sensor Tower

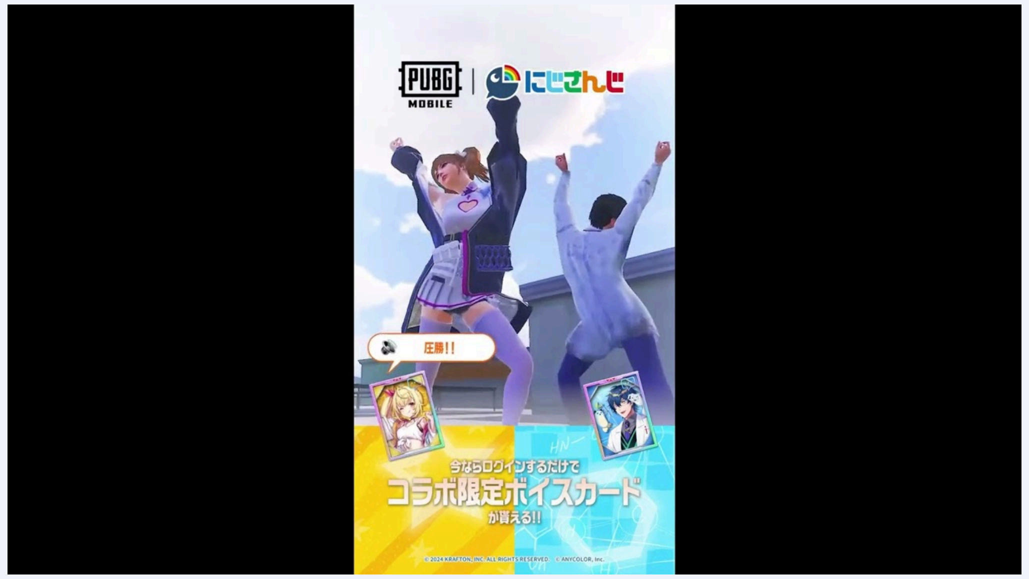
Entering new markets requires cultural knowledge.

Competing with local publishers who focus primarily on their native audience is no easy task. Generating effective creative requires knowledge of your audience and their culture. Using celebrities like Whiteout Survival did in the left creative can be a great way to target an audience, but understanding local celebrities, their brands, and their audiences is crucial. Categories that are more niche in one market may be huge in another. For example, PUBG: Mobile utilized virtual youtubers in the middle creative, a genre of influencers that is more niche in the West but are huge in Japan. Something as fundamental as setting can make an ad creative more familiar: Merge Mansion shows several famous Japanese locations in the right creative. Meanwhile, Whiteout Survival's creative features a train station. an ubiquitous setting for Japanese people that may not be the first setting to come to mind for teams not familiar with the market.

Whiteout Survival
YouTube Japan, December 2024

Source: Sensor Tower

PUBG: Mobile
Instagram Japan, December 2024



Source: Sensor Tower

Merge Mansion
Instagram Japan, December 2024

Source: Sensor Tower

04 Conclusion

"

Only a few years after Homa co-designed the foundation of this category's (hybridcasual) definition and pillars with Sensor Tower, we've seen the hybridcasual category accelerate significantly. Sensor Tower has been instrumental in helping us identify and structure this emerging category, solidifying our position as a leading player while enabling us to adapt our strategies to continue driving innovation and delivering compelling gaming experiences.

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About this data: Methodology

- The authors of this report compiled the download and IAP revenue estimates provided in this report using the Sensor Tower Mobile App Insights platform.
- Figures cited in this report reflect iOS App Store and Google Play download and revenue estimates for January 1, 2014 through December 31, 2024.
- Download estimates presented are on a per-user basis, meaning that only one download per Apple or Google account is counted towards the total.
- Downloads of the same app by the same user to multiple devices, updates, or re-installs of the same app by the same user are not counted towards the total.
- Android app download and revenue estimates represent downloads and revenue from the Google Play Store only. Sensor Tower does not provide download estimates for third-party Android stores.
- In-app purchase (IAP) revenue estimates are gross — inclusive of any percent taken by the app stores. Revenue includes paid downloads, in-app purchases, and subscriptions from the iOS App Store and Google Play. This does not include any revenue from advertisements or third-party purchases.

View Detailed Report Methodology Here.

About Sensor Tower

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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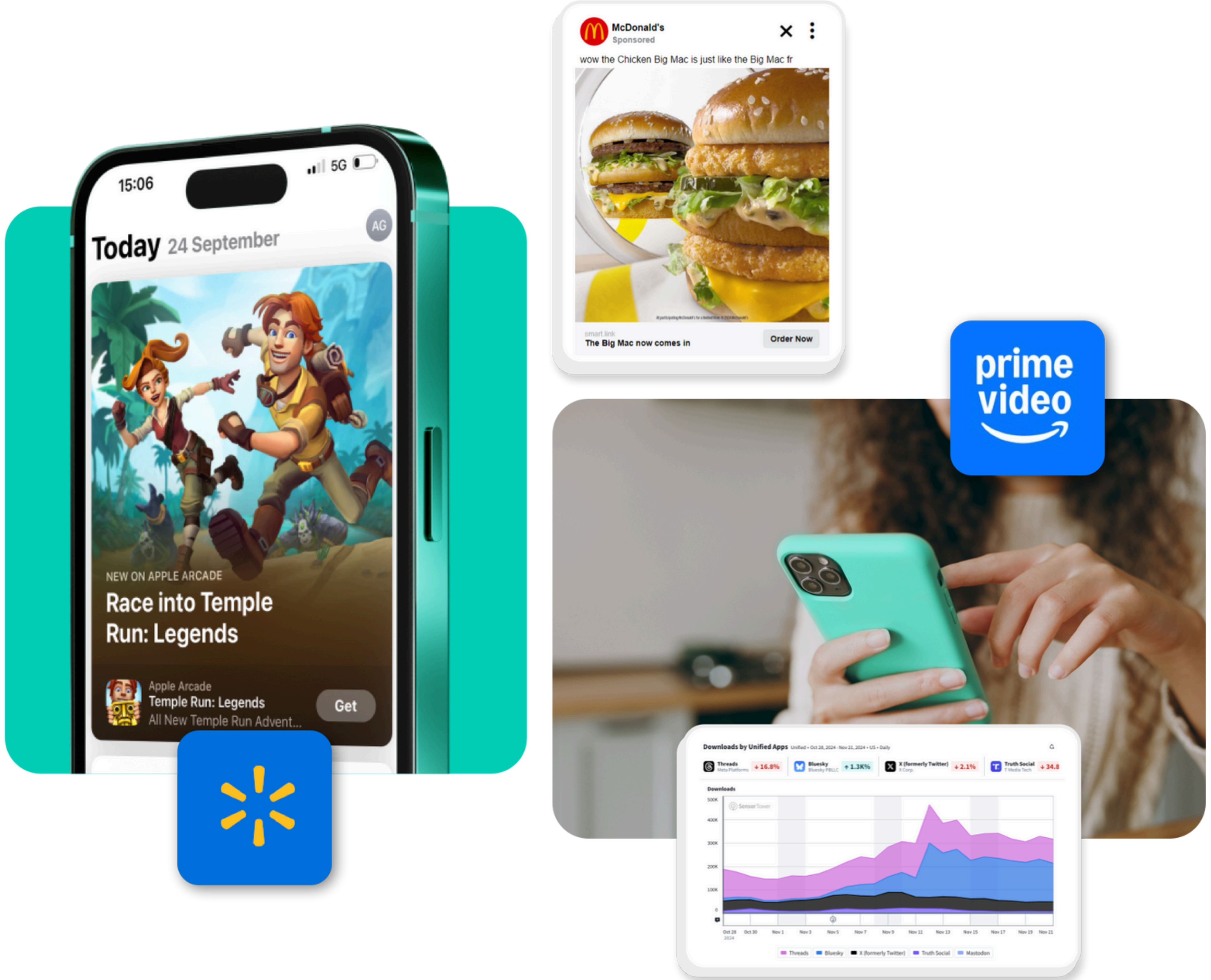

Sensor Tower | Our Customers

Top publishers trust Sensor Tower insights to grow their business.

L'ORÉAL		Google	EA	European Commission	Disney
petco	HERSHEY'S	amazon	ROVIO	DOORDASH	depop
Walmart	7 ELEVEN	Microsoft	SEGA	dyson	SONY
fetch REWARDS	Pizza Hut	Meta	OUTFIT7	Gett.	ByteDance
Alibaba.	POPEYES	Tencent 腾讯	WARNER BROS. GAMES	P&G	NBA
CVS Health.	Domino's	Johnson & Johnson		Welch's	Revolut

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

Sensor Tower

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