

 REPORT

The gaming app insights report: 2025 edition

Unlocking growth opportunities
for mobile marketers

 ADJUST



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INTRODUCTION

Mobile gaming reaches a new level

The global mobile gaming industry is at a defining moment. After a challenging 2023, the market proved its resilience in 2024, bouncing back thanks to strategic investments, technological advancements, and new growth areas. With gaming app revenue set to reach [\\$126.1 billion by 2025](#), alongside a projected [1.9 billion players by 2027](#), there's a huge, renewed opportunity for innovation and growth. In 2024, [mobile accounted for 49% of total gaming revenue](#)—outpacing console (28%) and PC (23%), reaffirming its mass appeal and resilient consumer demand. Gaming also remained the [leading category on both the App Store and Google Play](#).

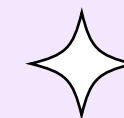
Mobile games are getting smarter, more immersive, and deeply personalized. But, innovation isn't just happening in gameplay. Hybrid monetization has become an industry norm, with developers no longer relying on a single revenue stream. In-app purchases (IAP), ads, battle passes, and subscriptions work together to maximize revenue while keeping players invested. And it's working. Players aren't just spending; meaningful rewards are now expected, from exclusive skins to personalized perks.

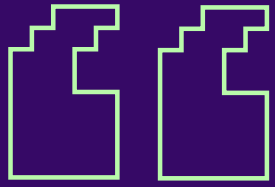
Hyper casual, hybrid casual, puzzle, and strategy games remain the kings of downloads. A new wave of ultra casual games is also emerging, catering to players who enjoy simpler mechanics with high replayability. However, with competition rising and players seeking quick, engaging experiences, retention remains challenging for these genres. Studios are responding with social features, in-game communities, and live-service models that keep players engaged beyond day one. In parallel, IP-based games like Monopoly Go! and Pokémon TCG Pocket are proving that brand recognition and

nostalgia can be just as powerful as innovative gameplay, drawing in loyal fan bases and fostering strong player communities.

Meanwhile, competitive and multiplayer games continue to thrive, with live events, esports, and frequent updates maintaining high retention. Cross-platform functionality is further strengthening engagement, allowing players to seamlessly transition between mobile, PC, and console, increasing session times and overall player investment.

In 2025, success in mobile gaming won't come from playing it safe. The studios that embrace AI to create better experiences, refine monetization, and deliver high-quality, localized ads and gameplay flows will define the next era of gaming. Are you ready to play to win?





“After a period of market volatility, mobile gaming is back on a growth trajectory. Installs are rebounding, making 2025 a moment to maintain momentum while improving retention and user stickiness. Studios that invest in AI-driven personalization and embrace predictive engagement strategies like lifetime value optimization will see stronger, more sustainable growth. As mobile-first adoption accelerates in regions like LATAM and MENA, game developers and marketers that prioritize long-term player relationships over short-term acquisition will reap the rewards.”

ADJUST



Tiahn Wetzler
**Director,
Content & Insights**

Game on: AI in mobile gaming for smarter worlds and stronger engagement

AI is reshaping mobile gaming. From development to player engagement and monetization, it's making games more intelligent, immersive, and efficient to run. Studios that master AI—without losing the human touch—will shape its future.

AI-POWERED GAME DEVELOPMENT

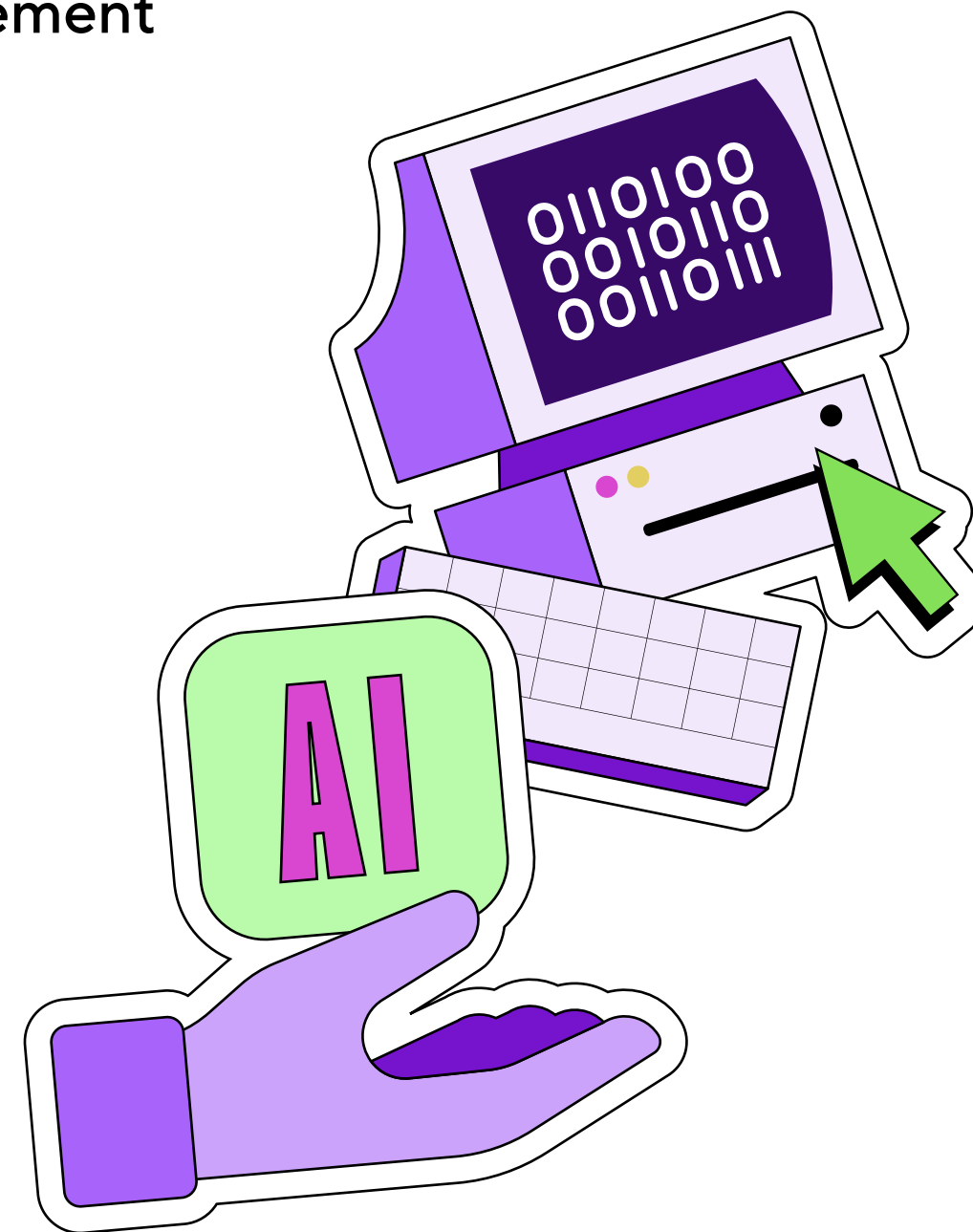
One of the most transformative shifts in game development is procedural content generation. AI is now capable of dynamically creating levels, textures, and entire game environments, ensuring unique experiences with each session. Non-playable characters (NPCs) have also evolved, they can now respond to player interactions in real time, leading to richer storytelling and more responsive gameplay.

Beyond design, AI is streamlining localization and voiceovers, enabling faster, more cost-effective global releases. Generative AI voice acting is accelerating multi-language rollouts, making high quality localization more accessible to studios of all sizes.

AI-DRIVEN PERSONALIZATION AND RETENTION

AI is revolutionizing engagement by adapting experiences to individual player behavior. Dynamic difficulty scaling, for example, ensures a balanced challenge, keeping casual players engaged while maintaining depth for experienced gamers. AI-powered recommendations tailor missions, rewards, and content, creating a seamless progression system that feels organic rather than pre-programmed.

AI enables studios to anticipate churn before it happens, using predictive modeling to identify disengaged players and trigger personalized incentives to keep them invested. This includes things like exclusive content, discounts, or engagement-driven rewards.



AI IN MONETIZATION: TRANSFORMING GAME ECONOMICS

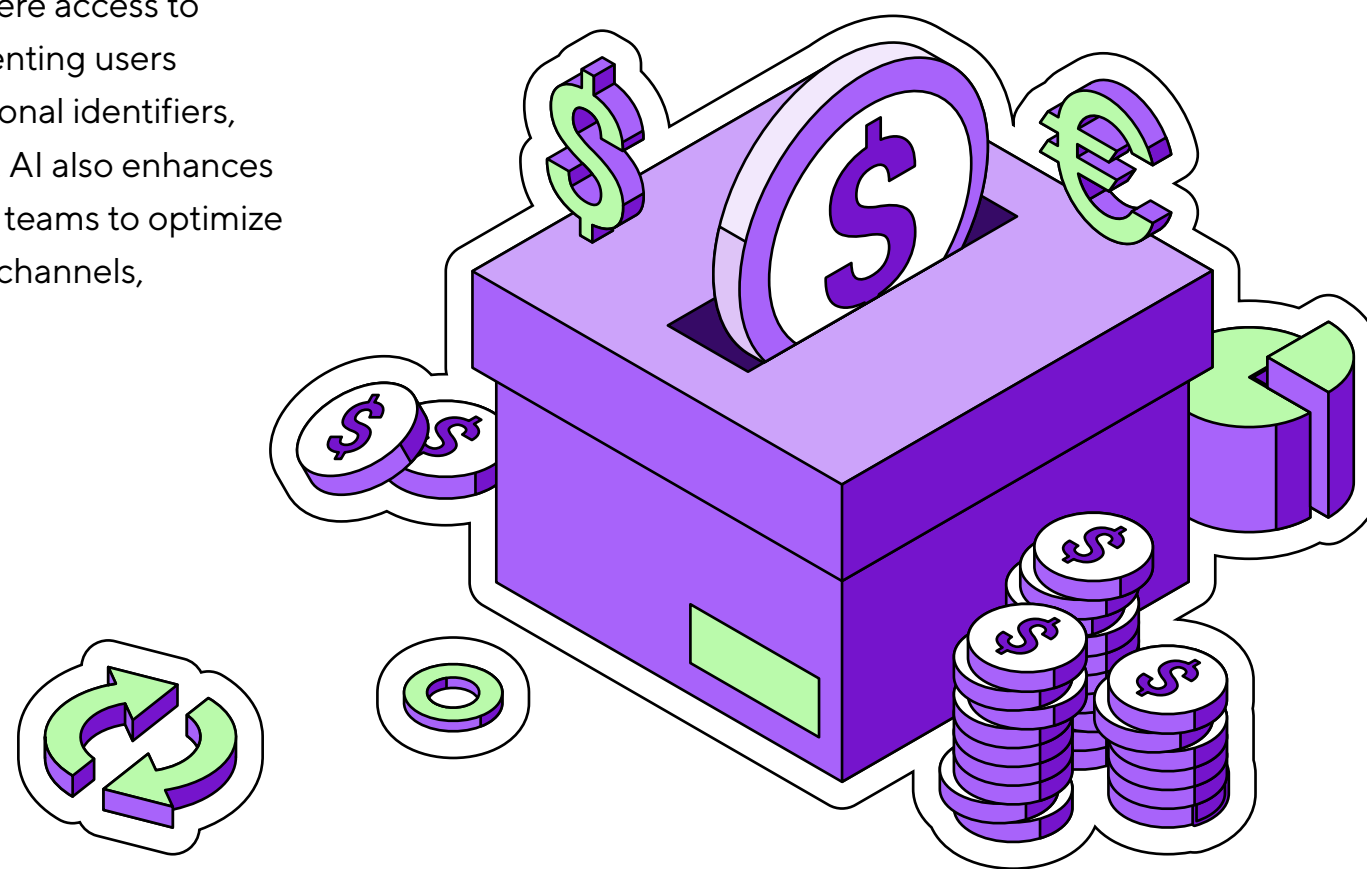
Monetization strategies are shifting away from static models, with AI able to adapt in-app pricing in real time—based on player behavior—and optimize revenue across segments. High-value players may see exclusive premium offers, while casual players are presented with lower, entry-price incentives.

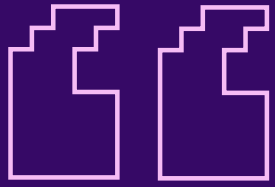
Advertising is also becoming more intelligent. AI-powered ad placements ensure that ads appear at optimal moments, reducing disruptions and improving engagement. This capability not only enhances user experience, it maximizes ad revenue and conversion rates.

AI IN USER ACQUISITION AND MARKETING

As UA costs continue to climb, AI is refining acquisition strategies through real-time A/B testing, enabling studios to quickly identify and scale top-performing ad creatives.

AI-driven cohort-based targeting is proving essential for precision marketing, particularly in cases where access to user IDs like the IDFA is restricted. By segmenting users based on in-game behavior rather than personal identifiers, studios can drive higher-quality acquisitions. AI also enhances real-time bidding (RTB), enabling marketing teams to optimize spend across key platforms, top performing channels, and programmatic ad networks in real-time.





“Automation and AI have revolutionized the approach to UA and monetization, which has enabled the industry to become more product-driven than ever before. As a result, more new companies are breaking through, helping to fuel the market growth we see today. If you look at the top 20 games compared to a year ago, there’s far more change than before—proving that fresh creative ideas can still win.”



Daniel Tchernahovsky
**VP, Global Business
Development**

Enter the new era of game discovery

The way players discover mobile games is evolving. UA from mobile ads, where all downloads take place via the App Store and Google Play, is no longer the only scalable way to find players. Developers are embracing new, diversified acquisition strategies that reach players where they spend the most time (and money).

EMERGING ACQUISITION CHANNELS DRIVING GROWTH

Connected TV (CTV) & streaming ads: [CTV ad spend is expected to grow](#) by 13.8% in 2025, making it one of the fastest-growing UA channels. With more players consuming gaming-related content on streaming platforms, CTV ads provide a high-value opportunity to drive installs, re-engagement, and long-term retention.

Influencer & community marketing: Short-form video is now a leading driver of organic game discovery. Top-performing games increasingly prioritize influencer-led campaigns on TikTok, YouTube Shorts, Twitch, and Discord. Gaming communities powered by content creators and streamers have become some of the most effective engagement channels, as players trust recommendations from creators over traditional ads.

Alternative app stores & web shops: As app store fees continue to rise, developers are taking control of their revenue streams. The push toward alternative app stores, direct-to-consumer (DTC) models, [rewarded UA](#), and independent game stores is accelerating. Publishers are now leveraging web shops and third-party marketplaces to maximize margins and build direct player relationships.



HOW ADJUST HELPS:

- [CTV AdVision](#): The first comprehensive measurement solution for CTV campaigns, which enables attribution of impressions, installs, and engagements from CTV ads, as well as insight into how CTV boosts conversion rates on other channels.
- [InSight](#): Identify which channels are truly driving growth and installs with our next-gen, AI-powered approach to incrementality analysis. Eliminate budget waste and focus spend on high-performing channels.

Breaking boundaries with cross-platform play

Cross-platform is becoming an industry standard in gaming, as players increasingly call for the flexibility to move seamlessly between mobile, PC, and console. Developers who successfully implement cross-play unlock higher retention, stronger lifetime value (LTV), and greater monetization opportunities.

KEY BENEFITS OF CROSS-PLATFORM PLAY

Increased in-game spending:

Multi-platform players spend more on IAPs, including cross-platform battle passes, exclusive content, and premium in-game upgrades.

Stronger multiplayer & social communities:

Cross-play strengthens multiplayer communities by making competitive and cooperative play more accessible across devices. This drives longer session times and increases word-of-mouth organic growth.

Success in high retention game genres:

Cross-platform functionality is especially impactful in high-engagement genres like shooters (Battle Royale), strategy (MOBA), simulation, and sandbox games

Titles like Fortnite, Minecraft, and Call of Duty: Warzone Mobile have already proven the value of cross-play, paving the way for more studios to embrace cross-device gaming.



HOW ADJUST HELPS:



- [PC & Console](#): Unify the player journey across mobile, PC, and console, with accurate measurement of cross-platform installs, engagement, and monetization.



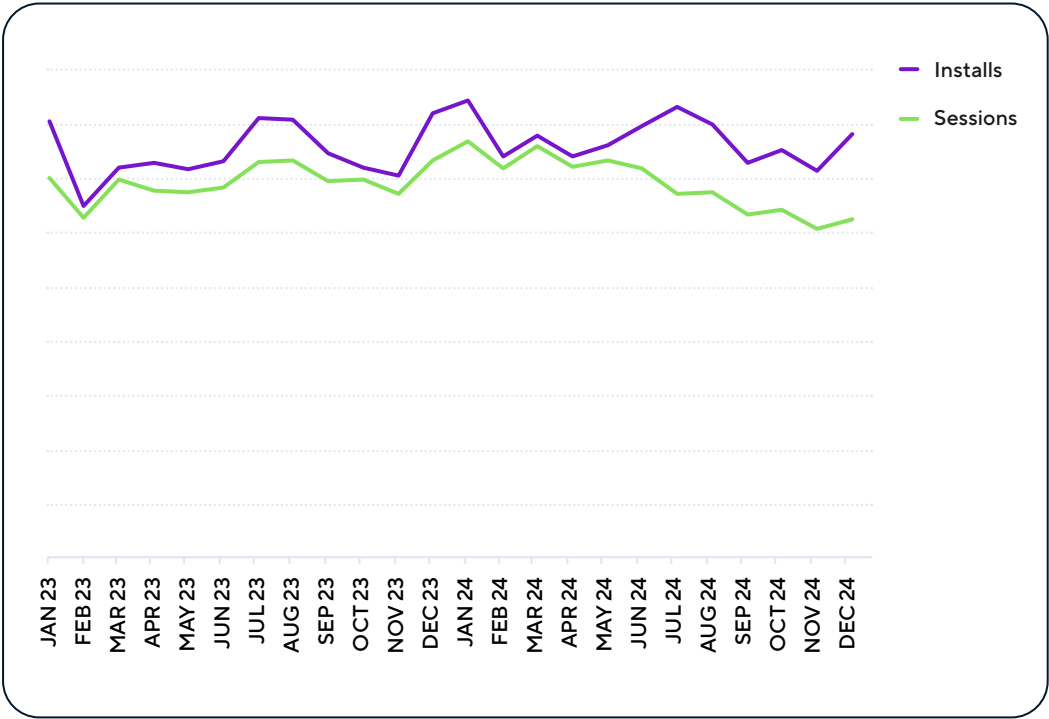
- [Engage](#): Create seamless, branded player experiences across platforms with personalized, frictionless journeys that drive revenue. From web-to-app transitions and [deep linking](#) to audience segmentation, perfectly optimize the path to conversion.

Mobile gaming’s growth story in 2024

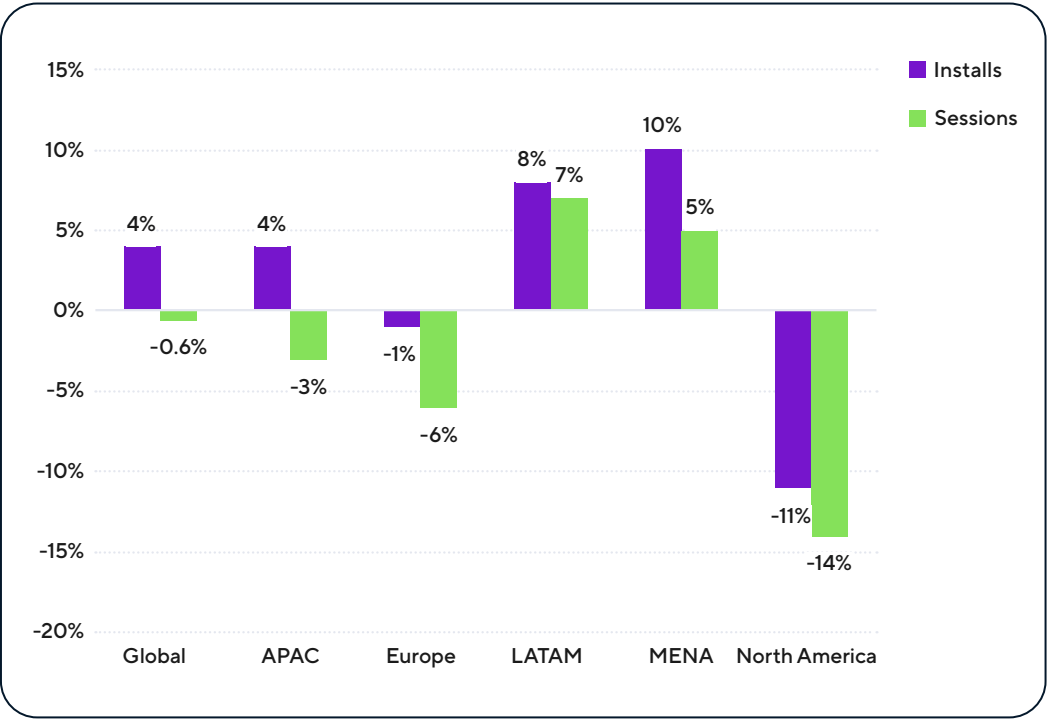
Gaming app installs grew 4% YoY in 2024, but sessions dipped 0.6%. January saw sessions rise 12% above average, with February installs up 15% YoY. July installs rose 8%, yet sessions fell 2%. By October, installs held at +4% YoY, but sessions dropped 8%, signaling retention issues. In December, installs fell 5% YoY but stayed 1% above the 2024 average, while sessions ended the year down 10%.

LATAM and MENA saw the most gaming app growth in 2024, with installs rising 8% and 10% YoY, and sessions up 7% and 5%. In contrast, North America saw the steepest decline— installs decreased 11% and sessions dropped by 14%. APAC posted a 4% increase in installs, though sessions lagged at -3%. Europe experienced a downturn, with installs decreasing by 1% and sessions falling 6%.

Gaming app install and session growth
January 2023 - December 2024 (Global)

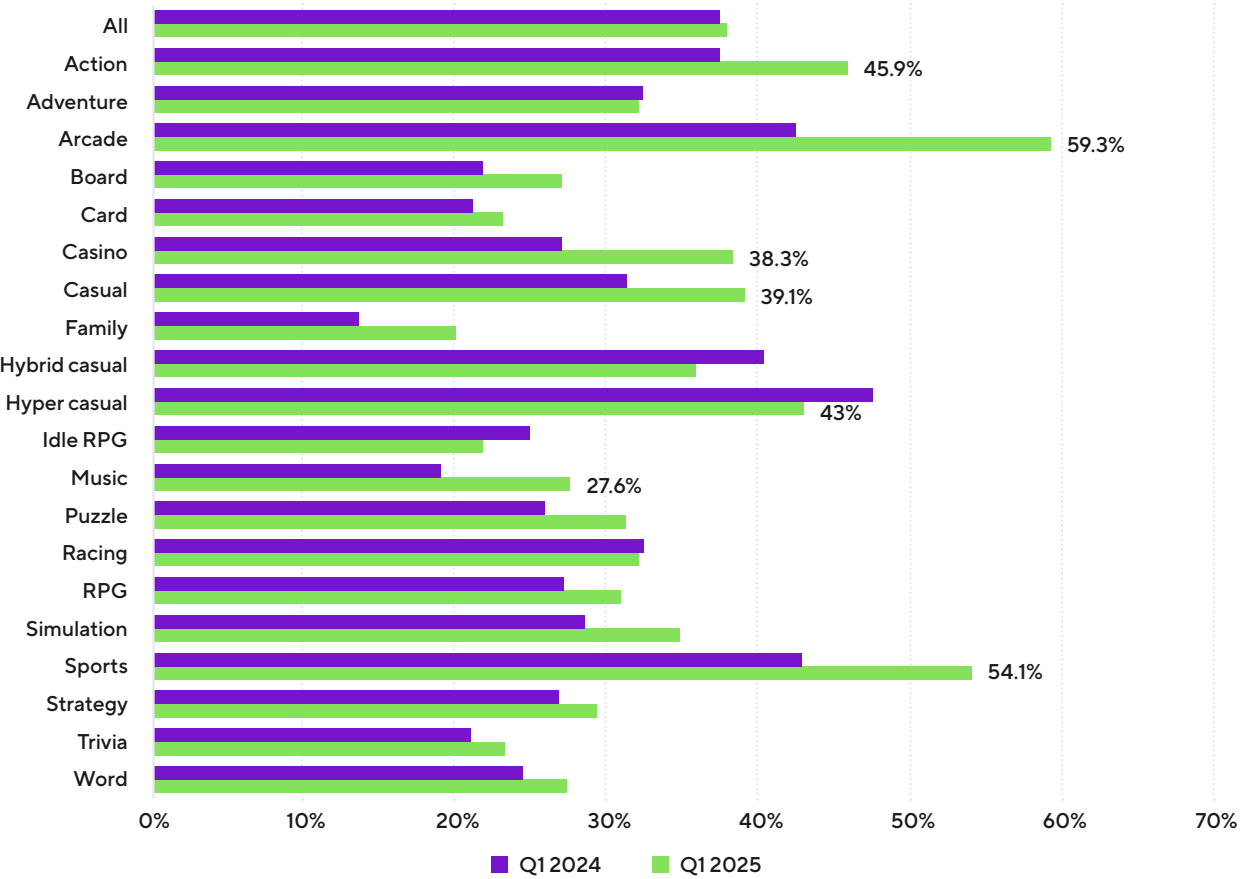


Gaming app install and session growth percentages
YoY by region 2023 - 2024



Balancing privacy challenges and mobile gaming performance

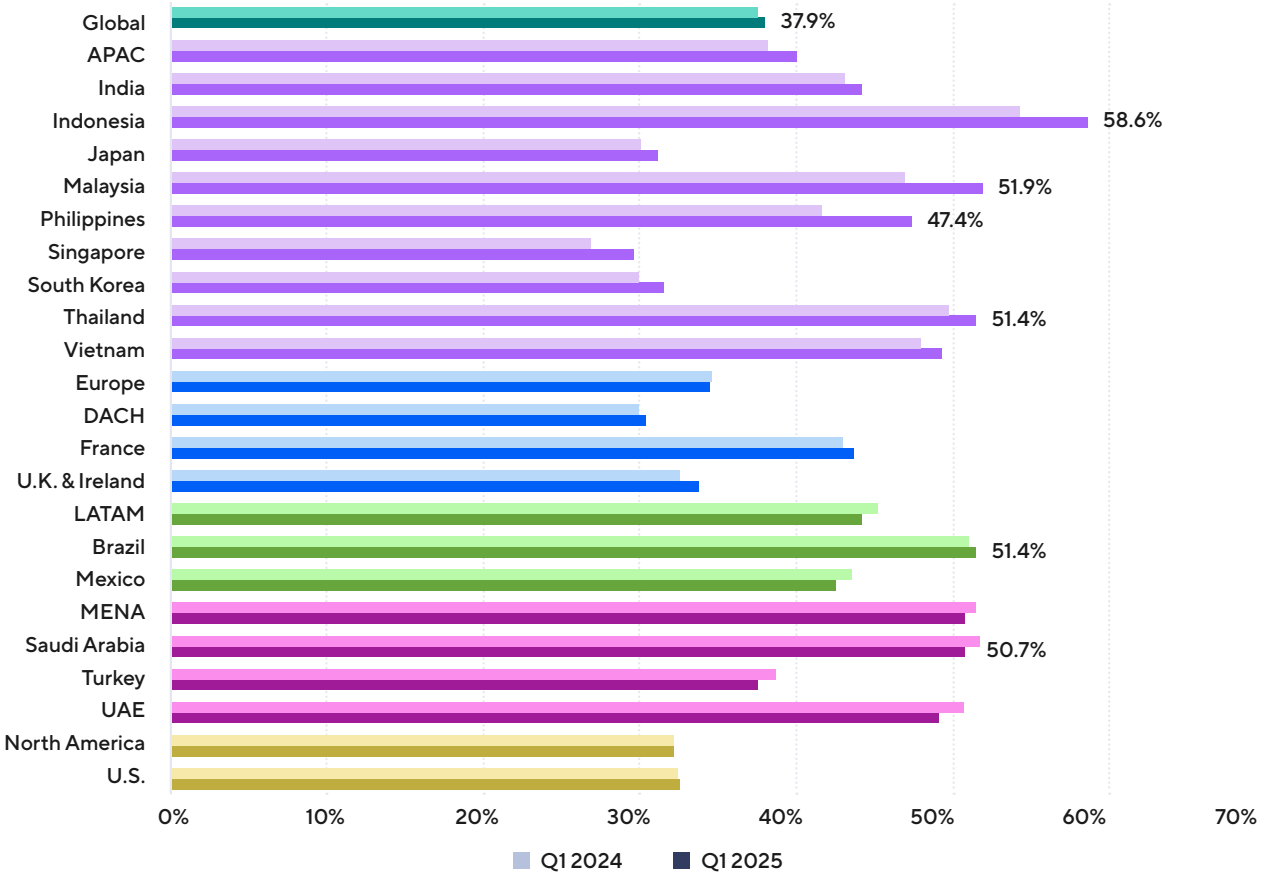
Gaming app ATT opt-in rates Q1 2025 vs. Q1 2024 (Global)



In Q1 2025, gaming App Tracking Transparency (ATT) opt-in rates (among users shown the prompt) rose to 37.9%, up from 37.5% in Q1 2024. Arcade games saw the biggest jump, rising from 42.4% to 59.3%, while sports (54.1%), casino (38.3%), and action (45.9%) also grew. Idle RPGs declined from 24.9% to 21.8%, and hyper casual games dropped from 47.5% to 43%. Getting opt-in messaging right is the key to building and maintaining a high rate.

Some regions saw notable increases, with Indonesia reaching 58.6% (up from 54.2%) and Malaysia climbing to 51.9% (from 46.9%). Thailand also rose to 51.4% from 49.7% and in MENA, rates hovered around 50%. Some markets saw minor declines, such as the UAE, which dropped from 50.6% to 49%, and Saudi Arabia, which declined slightly from 51.7% to 50.7%. The U.S. remained steady at around 32%.

Gaming app ATT opt-in rate by region and country
Q1 2025 vs. Q1 2024



Methodology

VERTICALS:

Games (all), action, adventure, arcade, board, card, casino, casual, family, hybrid casual, hyper casual, idle RPG, music, puzzle, racing, role playing (RPG), simulation, sports, strategy, swap, trivia, word.

REGIONS:

Global, APAC, Europe, LATAM, MENA, North America.

COUNTRIES:

Austria, Brazil, France, Germany, India, Indonesia, Ireland, Japan, Malaysia, Mexico, Philippines, Saudi Arabia, Singapore, South Korea, Switzerland, Thailand, Turkey, United Arab Emirates (UAE), United Kingdom (U.K.), United States of America (U.S.), Vietnam.

DATASET:

A mix of Adjust's top 5,000 apps and the total dataset of all apps tracked by Adjust. Our data comes from two sources, one including a list of 45 countries and one with approximately 250 based on the ISO 3166-1 standard.

DATE RANGE:

January 2023 - March 2025

RATIOS AND SHARES:

Reattribution and paid/organic are both expressed as ratios, where X:1. In the case of the paid/organic ratio, a value of 3 (3:1) means that for every 100 organic installs, there are 300 paid installs. Similarly, for the reattribution share, a value of 0.7 (0.7:1) would mean that for every 100 total actions (installs + reattributions), there are 70 reattributions.

All dollar amounts represented are USD.



Key takeaways

4%

Gaming app installs grew by 4% YoY in 2024, with LATAM (+9%) and MENA (+7%) leading growth.

27%

Hyper casual games dominated installs share at 27%, with action games accounting for 21% of total sessions.

83%

Strategy installs grew 83% YoY in 2024 and casino sessions increased by 32%.

↑
45

In 2024, gamers spent the most time playing action games, with an average session length of 45.15 minutes.

28%

Racing games experienced the largest increase in CTR, rising from 18% in 2023 to 26% in 2024, while hybrid casual games maintained the highest CTR, 28%.

↑
6.2

The median number of partners per app rose from 5.7 to 6.2, with hybrid casual games leading at 12.3 partners.

19%

Day 1 retention for games globally decreased from 28% to 27%, but casino saw an increase from 16% to 19%.

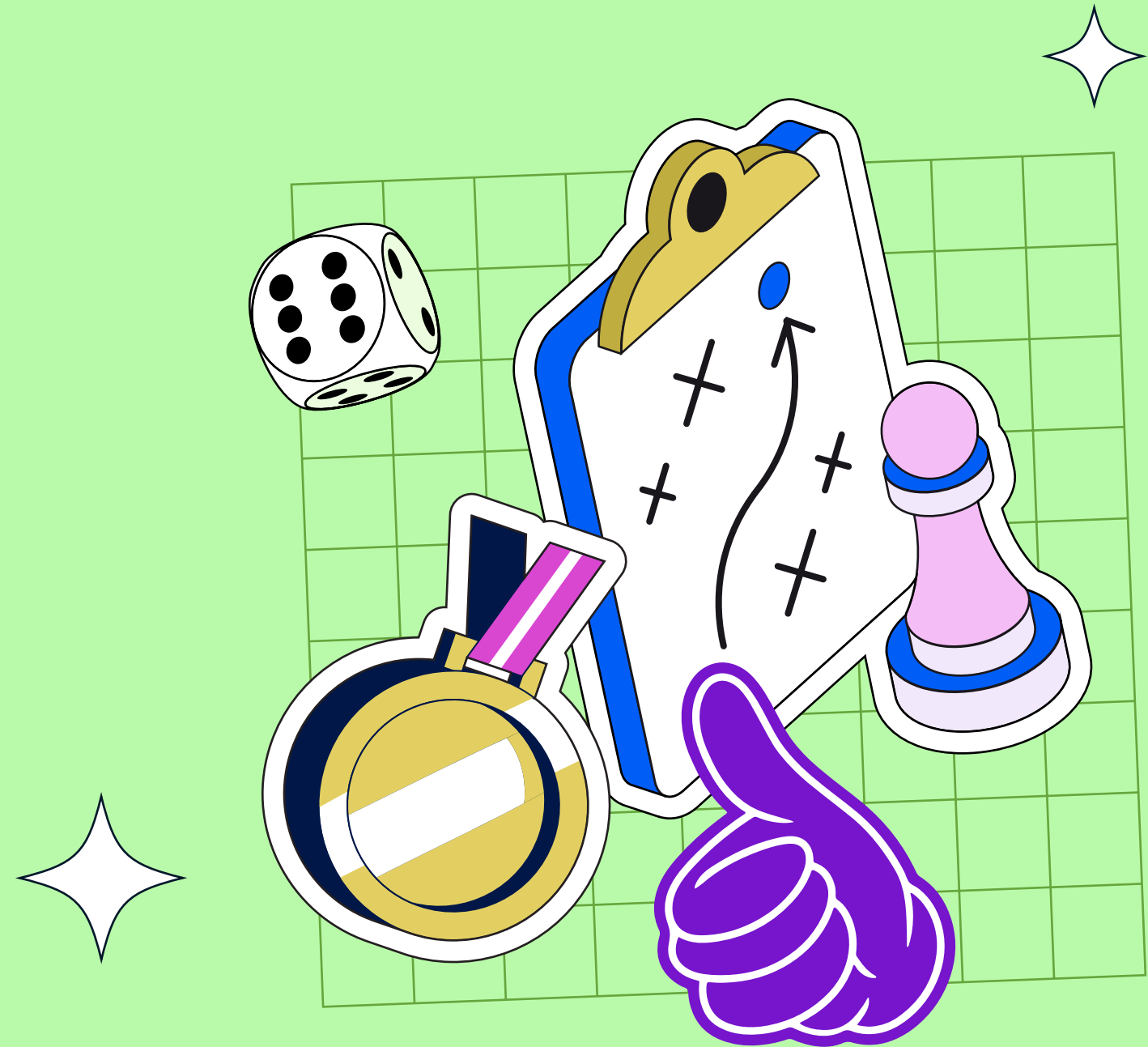
\$
6.48

RPGs saw a significant increase in ARPMAU from in-app purchases, rising from \$5.36 to \$6.48




























































PART 1

Game-changing insights for maximum impact

Top apps, install patterns, sessions, and retention rates



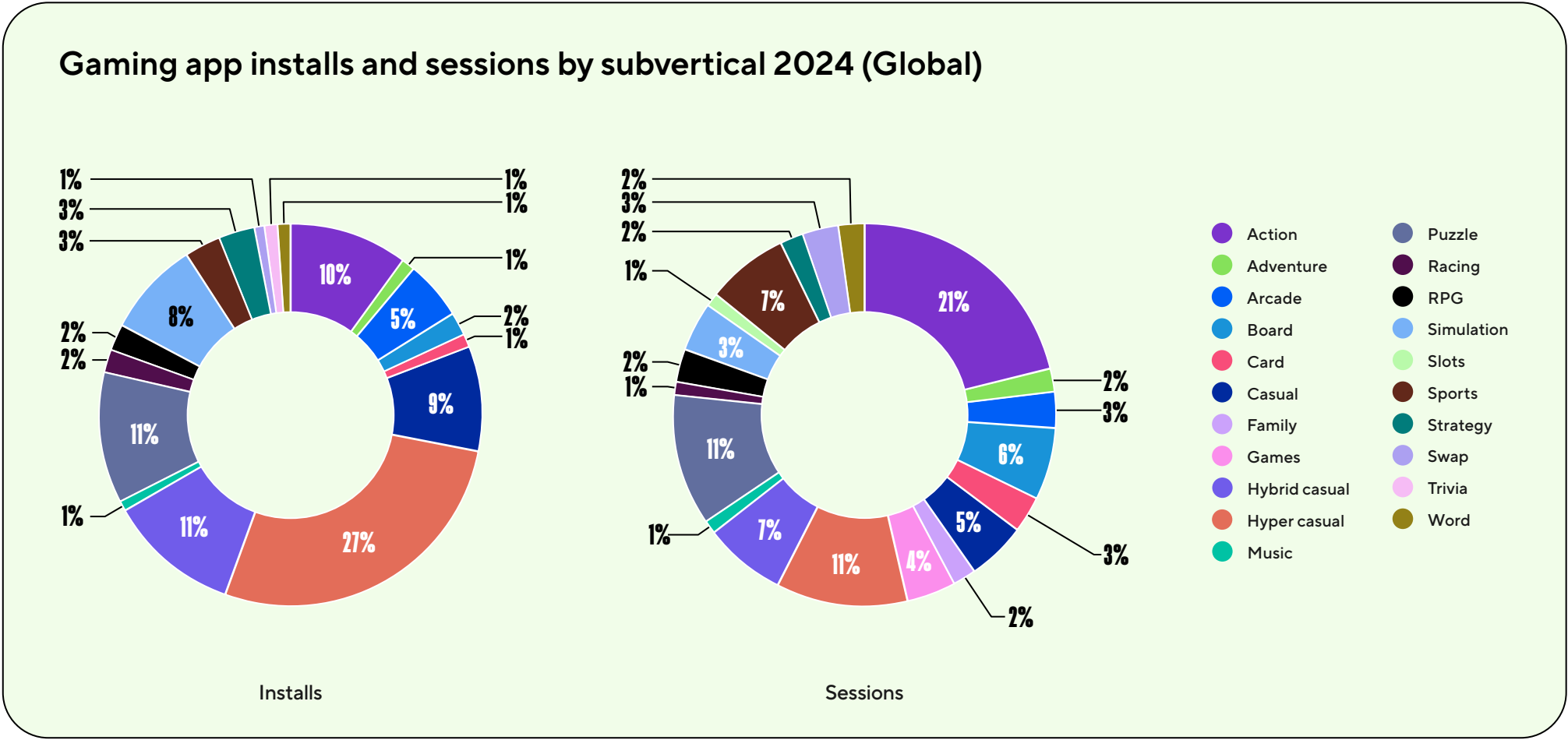
Top 10 mobile games by downloads, 2024

	GLOBAL	APAC	EUROPE	LATAM	MENA	NORTH AMERICA
1	 Garena Free Fire Garena Games Online	 Garena Free Fire Garena Games Online	 Block Blast! Hungry Studio	 Roblox Roblox Corporation	 Subway Surfers Miniclip.com	 Block Blast! Hungry Studio
2	 Roblox Roblox Corporation	 Ludo King® Gametion	 Roblox Roblox Corporation	 Garena Free Fire Garena Games Online	 Garena Free Fire Garena Games Online	 Roblox Roblox Corporation
3	 Block Blast! Hungry Studio	 Subway Surfers Miniclip.com	 Brawl Stars Supercell	 Subway Surfers Miniclip.com	 Pizza Ready! Supercell	 MONOPOLY GO! Scopely
4	 Subway Surfers Miniclip.com	 Roblox Roblox Corporation	 Pizza Ready! Supercell	 Pizza Ready! Supercell	 Football League 2025 MOBILE SOCCER MOBILE SOCCER	 Township Playrix
5	 Ludo King® Gametion	 Pizza Ready! Supercell	 Offline Games - No Wifi Games JindoBlu	 8 Ball Pool Gametion	 PUBG MOBILE Tencent	 Last War:Survival FirstFun
6	 Pizza Ready! Supercell	 Mobile Legends: Bang Bang Moonton	 Subway Surfers Miniclip.com	 Stumble Guys Scopely	 EA SPORTS FC™ Mobile Soccer Electronic Arts	 Brawl Stars Supercell
7	 Offline Games - No Wifi Games JindoBlu	 Indian Bikes Driving 3D Rohit Gaming Studio	 Royal Match Dream Games	 Offline Games - No Wifi Games JindoBlu	 Block Blast! Hungry Studio	 Subway Surfers Miniclip.com
8	 PUBG MOBILE Tencent	 Zupee: Enjoy Ludo Online Games Zupee: Enjoy Ludo Online Games	 PUBG MOBILE Tencent	 Blood Strike - FPS for all NetEase	 Roblox Roblox Corporation	 Royal Match Dream Games
9	 Royal Match Dream Games	 PUBG MOBILE Tencent	 Words of Wonders: Crossword Fugo	 Pou Paul Salameh	 8 Ball Pool Miniclip.com	 Pizza Ready! Supercell
10	 My Talking Tom 2 Outfit7	 Block Blast! Hungry Studio	 Paper.io 2 voodoo	 Snake.io Kooapps	 Candy Crush Saga Activision Blizzard	 Wood Nuts & Bolts Puzzle ABI Games Studio

Source:  SensorTower

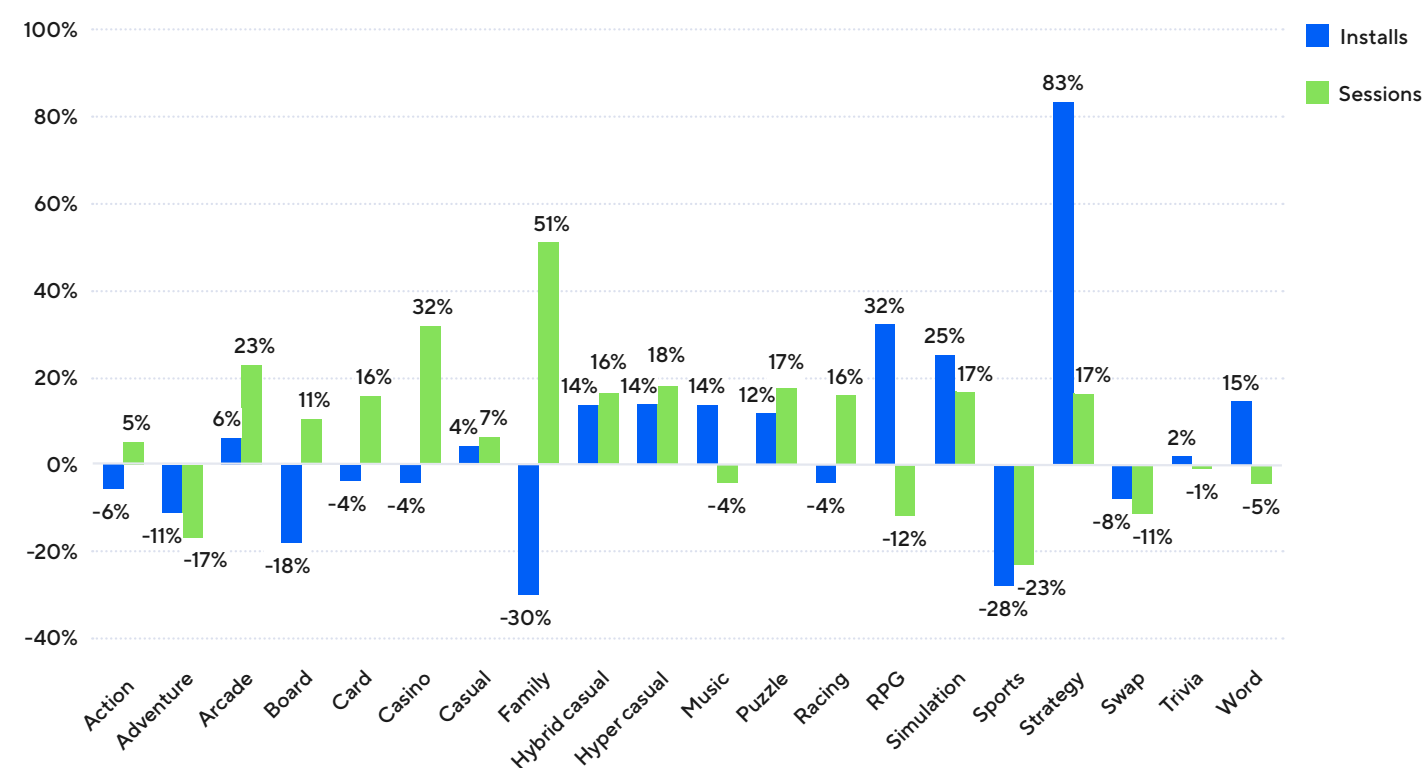
In 2024, hyper casual games continued to dominate gaming app installs—accounting for 27%—with their session share remaining lower at 11%. Puzzle games claimed an equal share of installs and sessions at 11%, while action games, despite capturing only 10% of installs, drove 21% of sessions. Hybrid casual titles made their mark with 11% of installs and 7% of sessions, while simulation (8% installs) and sports games (7% sessions) were player favorites. Strategy and RPG held a smaller install and session share, each staying under 4%.

The discrepancies in install and session distribution reflect the core business models of different genres. For instance, hyper casuals prioritize user acquisition and quick title turnover, relying on in-app ads, which leads to fewer sessions per game. Genres like RPG focus on retaining loyal players and driving revenue through IAP.

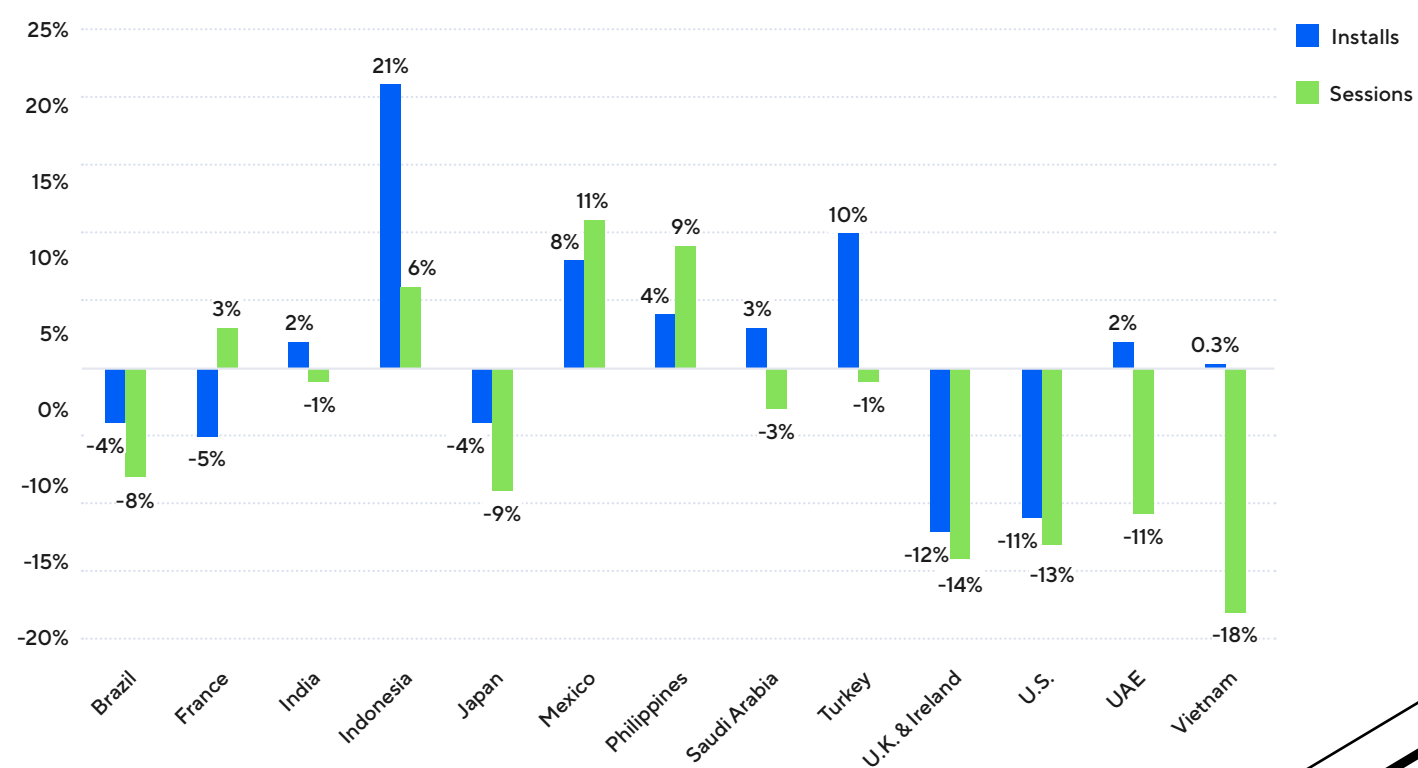


Strategy apps took the lead in 2024, with installs soaring 83% YoY. Casino and arcade games also saw significant engagement gains, with sessions rising 32% and 23%, respectively. Both hyper casual and hybrid casual continued to expand, with 14% install growth, while sessions rose 18% and 16%. Puzzle and simulation followed suit, with installs up 12% and 25%, and sessions increasing 17% for both. RPG told a different story—despite a 32% spike in installs, sessions dropped 12%, pointing to retention challenges.

Gaming app install and session growth percertanges by subvertical YoY 2023 - 2024 (Global)

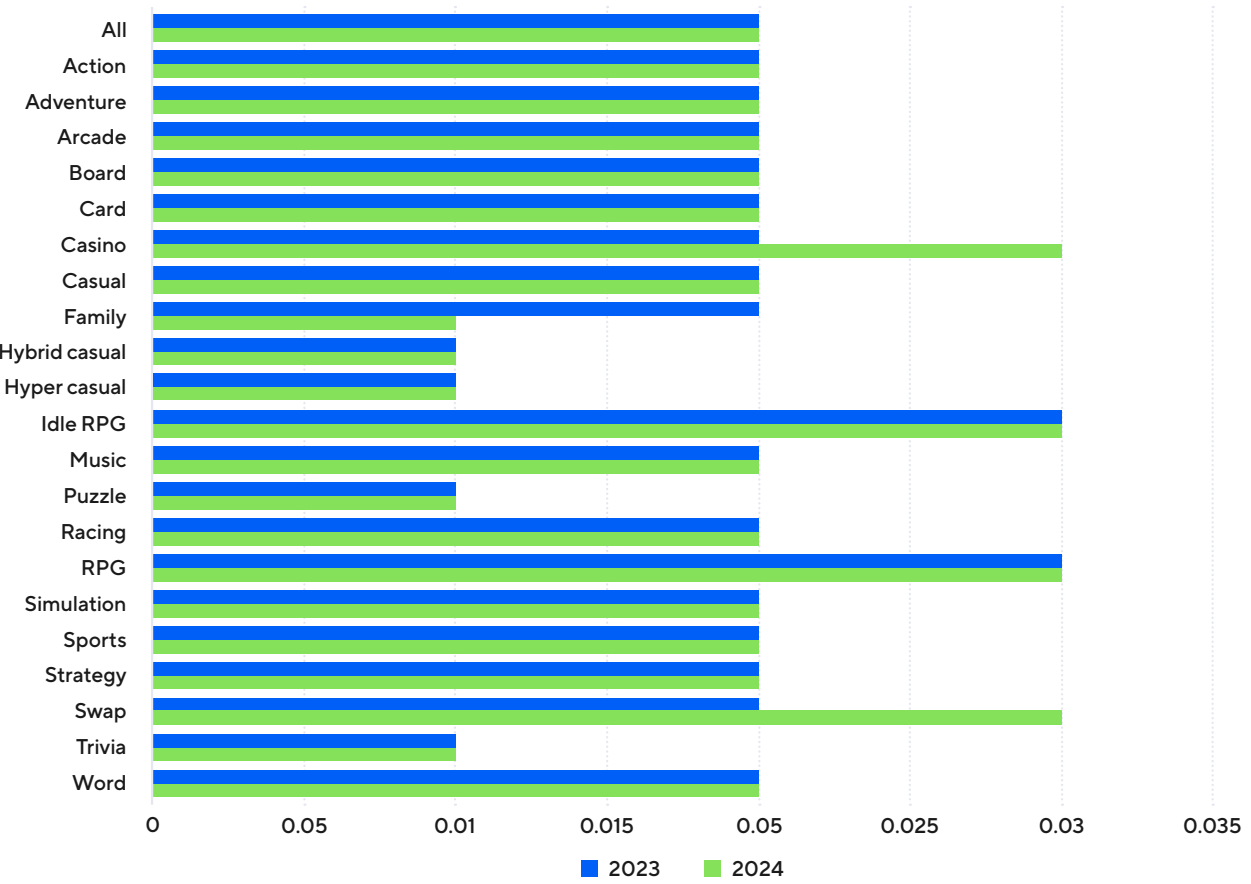


Gaming app install and session growth percentages YoY by country 2023 - 2024



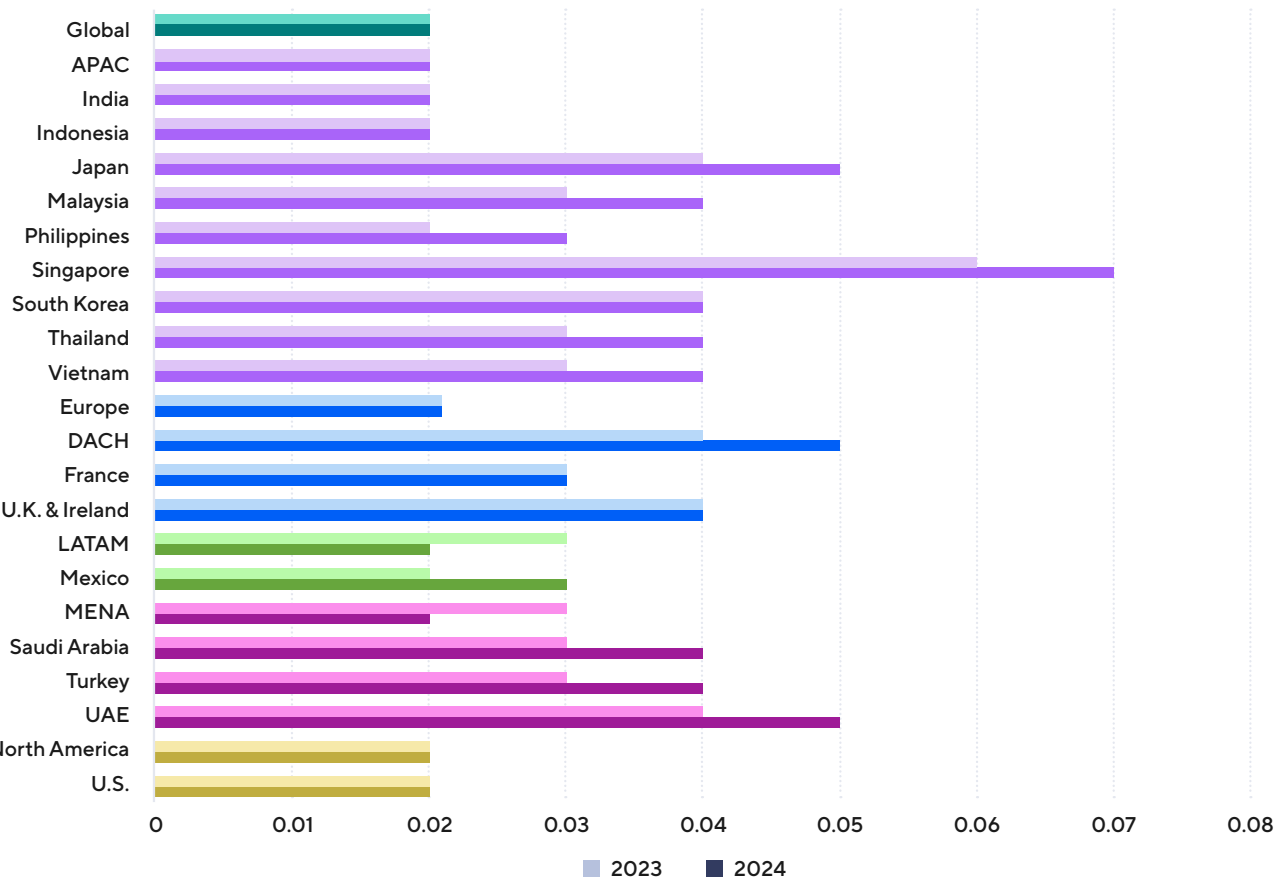
Indonesia recorded a 21% jump in installs and a 6% increase in sessions. Mexico and the Philippines also had a steady climb, with sessions up 11% and 9%. Meanwhile, the U.S. and U.K. & Ireland experienced declines for both installs and sessions. Vietnam saw the biggest sessions drop at -18% YoY.

Gaming app reattribution share 2023 - 2024 (Global)



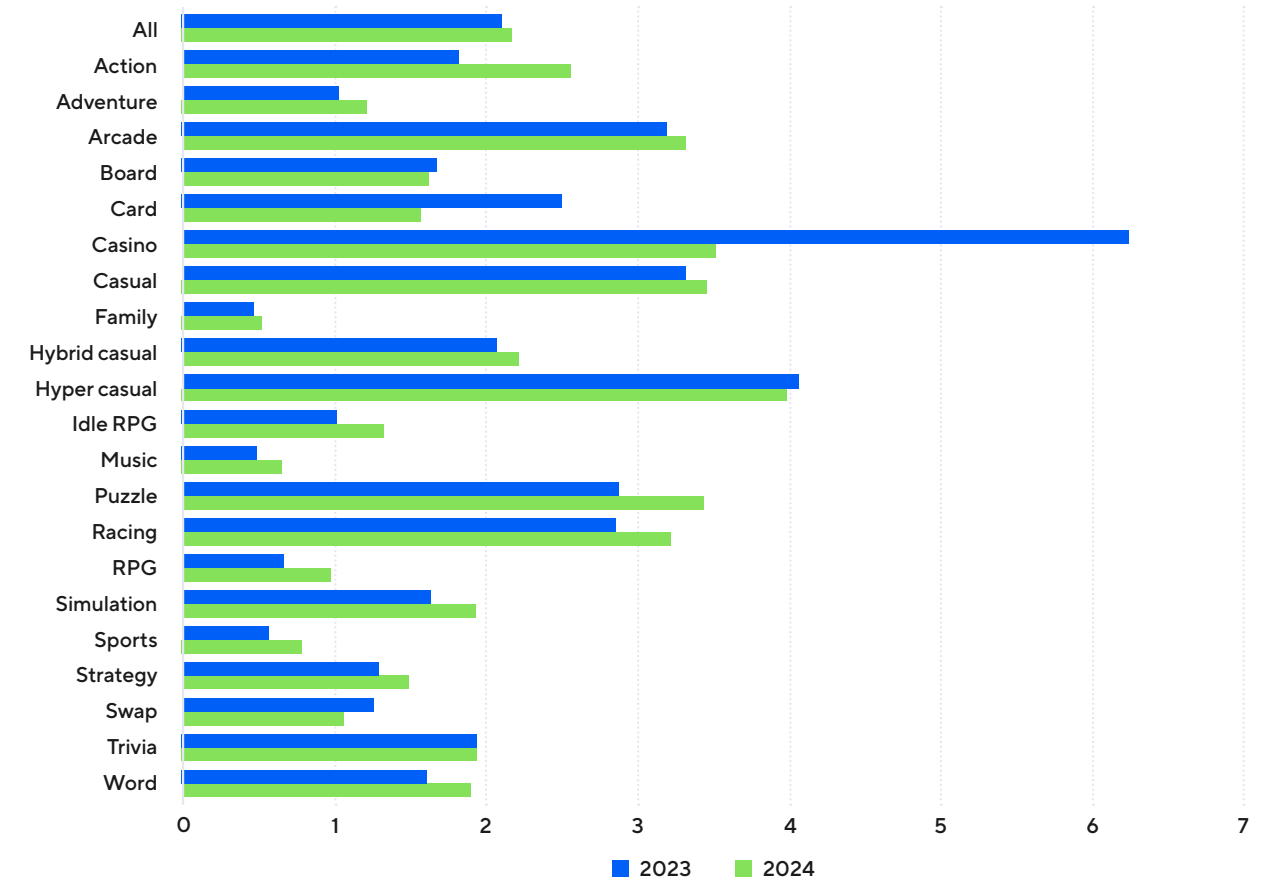
Re-engagement efforts in gaming apps remained consistent, with the global median reattribution share at 0.02 in both 2023 and 2024. Casino games saw a lift to 0.03, while hyper casual, trivia, and puzzle games remained at the lower end, with a 0.01 share.

Gaming app reattribution share by region and country 2023 - 2024



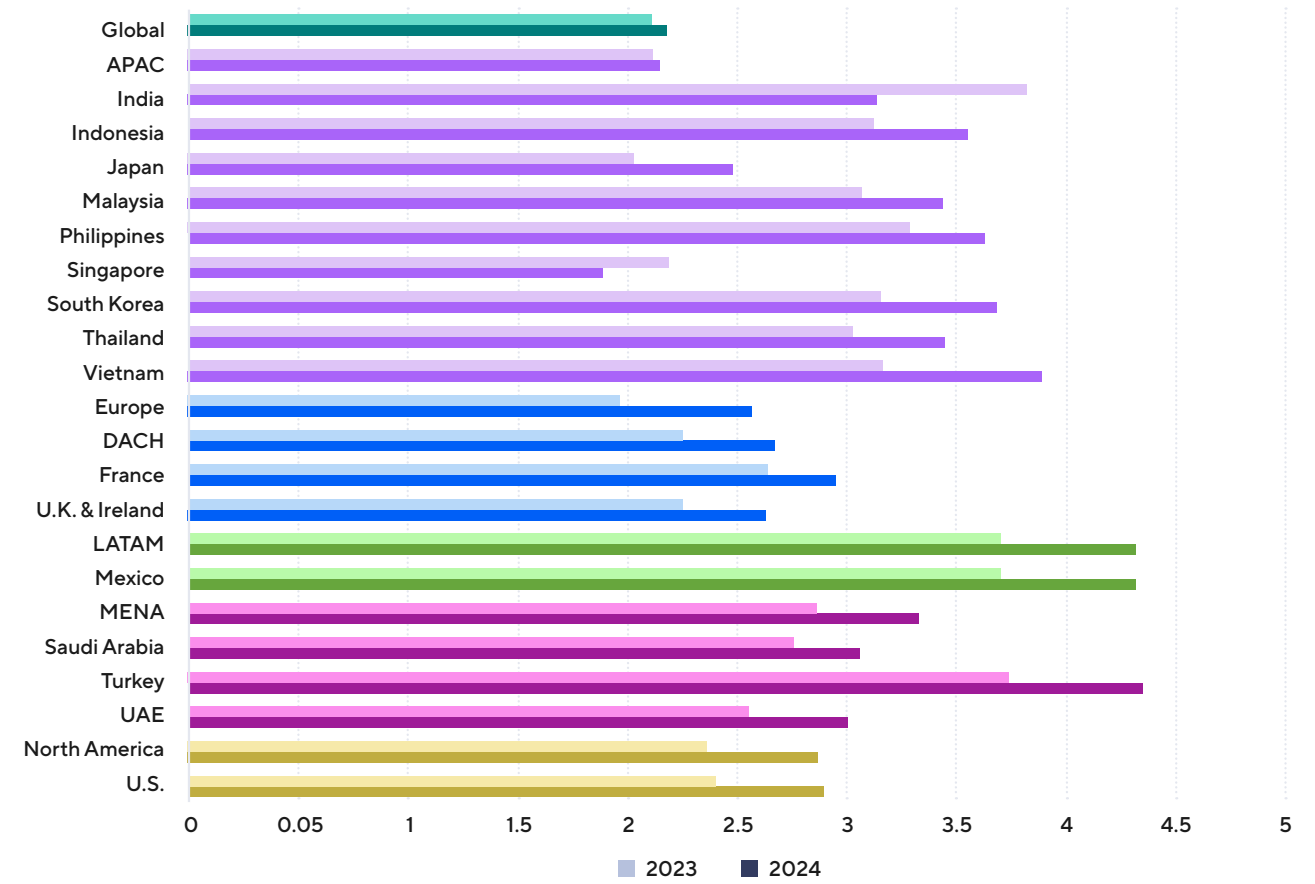
In 2024, Singapore had the highest reattribution share (0.07), up from 0.06 in 2023, while UAE, DACH, and Japan each rose to 0.05. Turkey, Saudi Arabia, Vietnam, and Thailand also saw slight increases to 0.04. Meanwhile, MENA and LATAM declined from 0.03 to 0.02.

Gaming app paid/organic ratio 2023 - 2024 (Global)



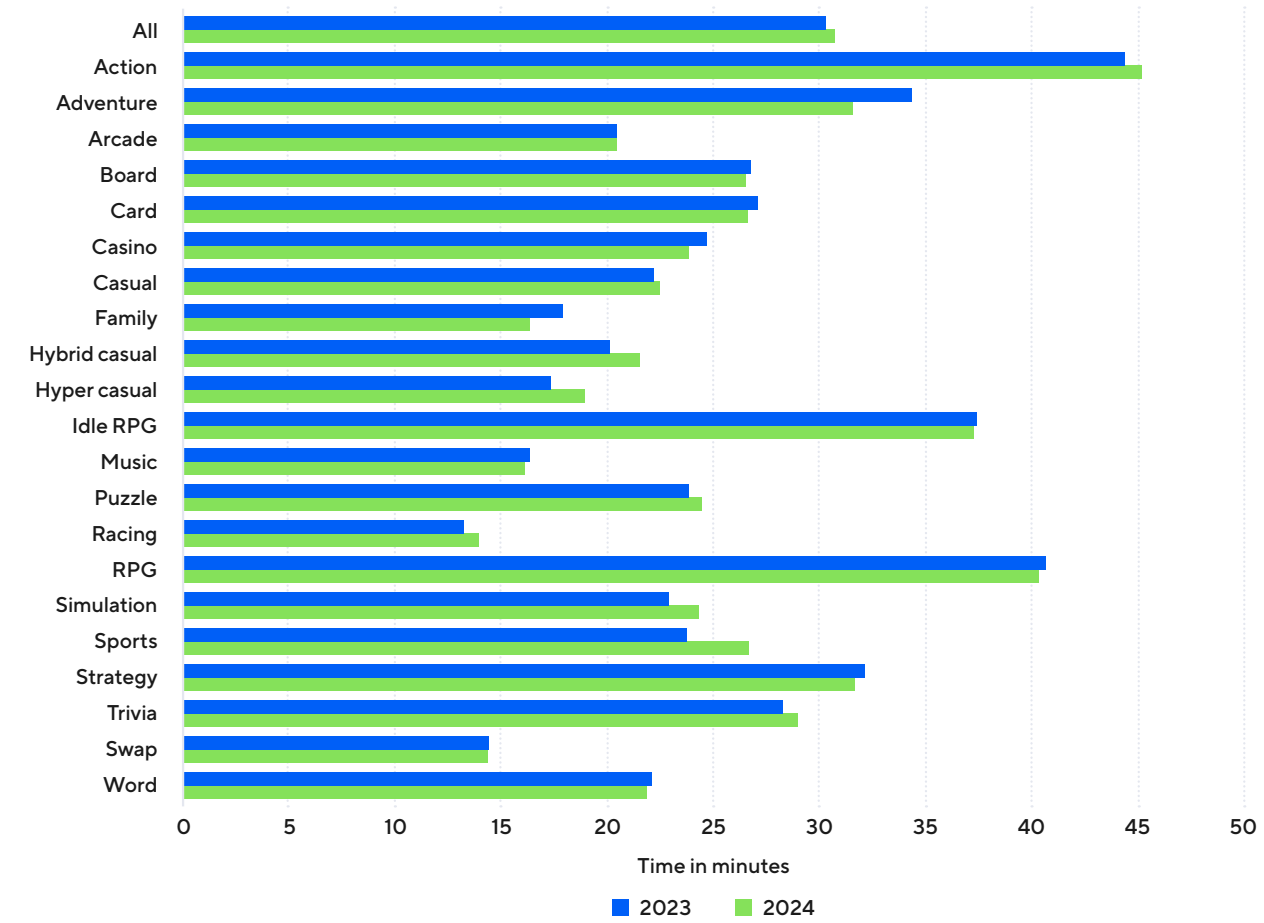
The global paid/organic ratio for gaming apps saw a slight uptick from 2.11 in 2023 to 2.18 in 2024. Casino games declined from 6.24 to 3.52—likely driven by increased organic traction in expanding markets like the U.S and parts of LATAM. Puzzle and racing apps leaned more on paid acquisition, with their ratios rising from 2.88 to 3.44 and 2.86 to 3.22, respectively.

Gaming app paid/organic ratio by region and country 2023 - 2024



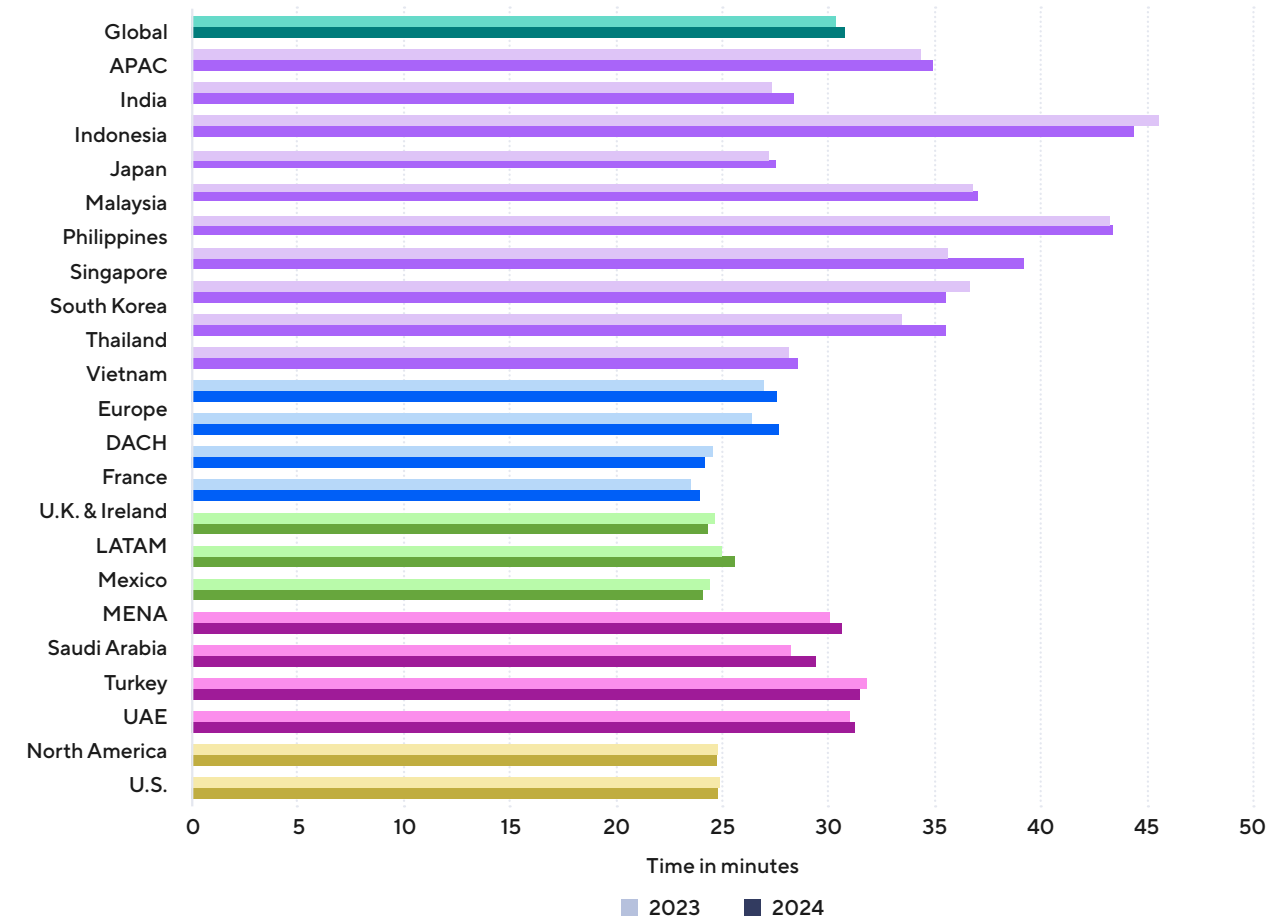
LATAM and Mexico saw the most significant increases, both climbing from 3.7 to 4.32, while Turkey recorded the highest paid/organic ratio at 4.35. Markets like Europe (1.97 to 2.57) and the UAE (2.55 to 3) also saw notable jumps. India was one of the few regions where the ratio declined, dropping from 3.82 to 3.14.

Gaming app session lengths 2023 - 2024 (Global)



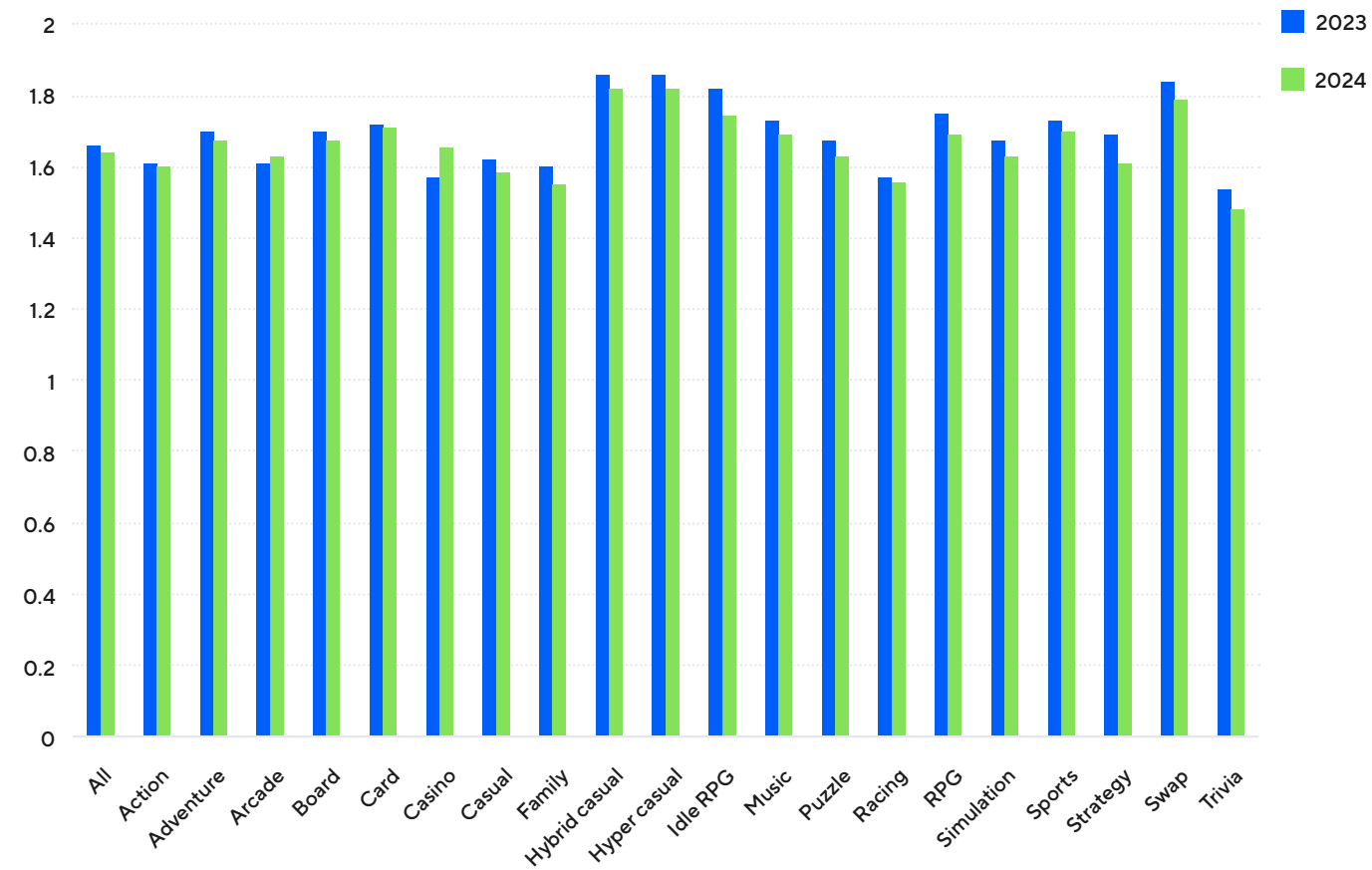
Gaming app session lengths were stable in 2024, averaging 30.75 minutes globally (up from 30.35 in 2023). Action games led with 45.15 minutes, while sports and simulation rose to 26.72 and 24.31. RPG remained highly engaging at over 37 minutes, while hyper (18.97) and hybrid (21.6) casual games grew. Adventure and family games declined slightly.

Gaming app session lengths by region and country 2023 - 2024



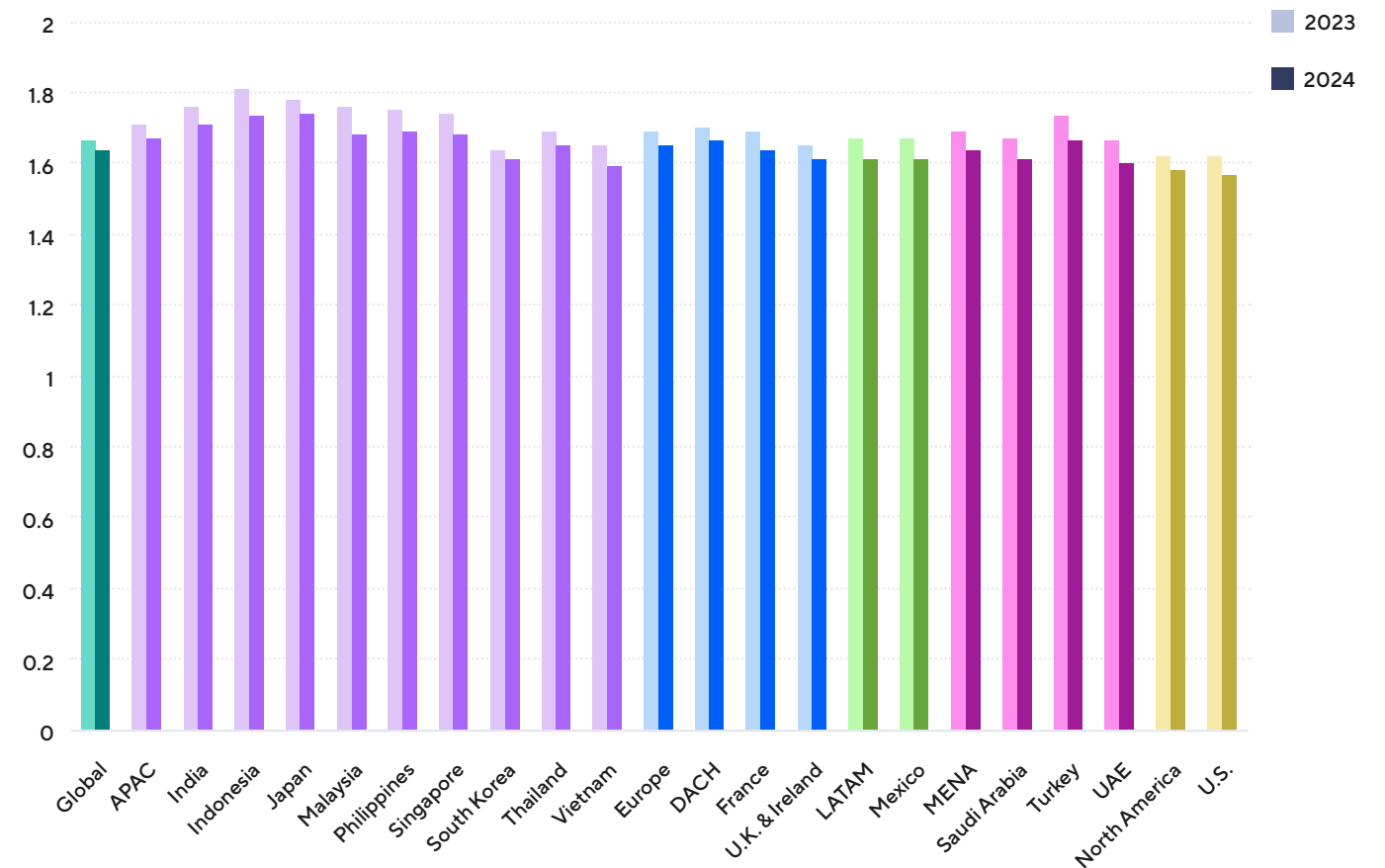
Indonesia recorded the longest gaming sessions in 2024, at an average of 44.31 minutes, with the Philippines (43.4) and Singapore (39.14) following closely, all experiencing slight increases. Thailand and South Korea remained strong, both exceeding 35 minutes. MENA (30.58) and Europe (27.54) had moderate gains. North America (24.66) and the U.S. (24.76) saw little change.

Gaming app sessions per user per day on day 0
2023 - 2024 (Global)



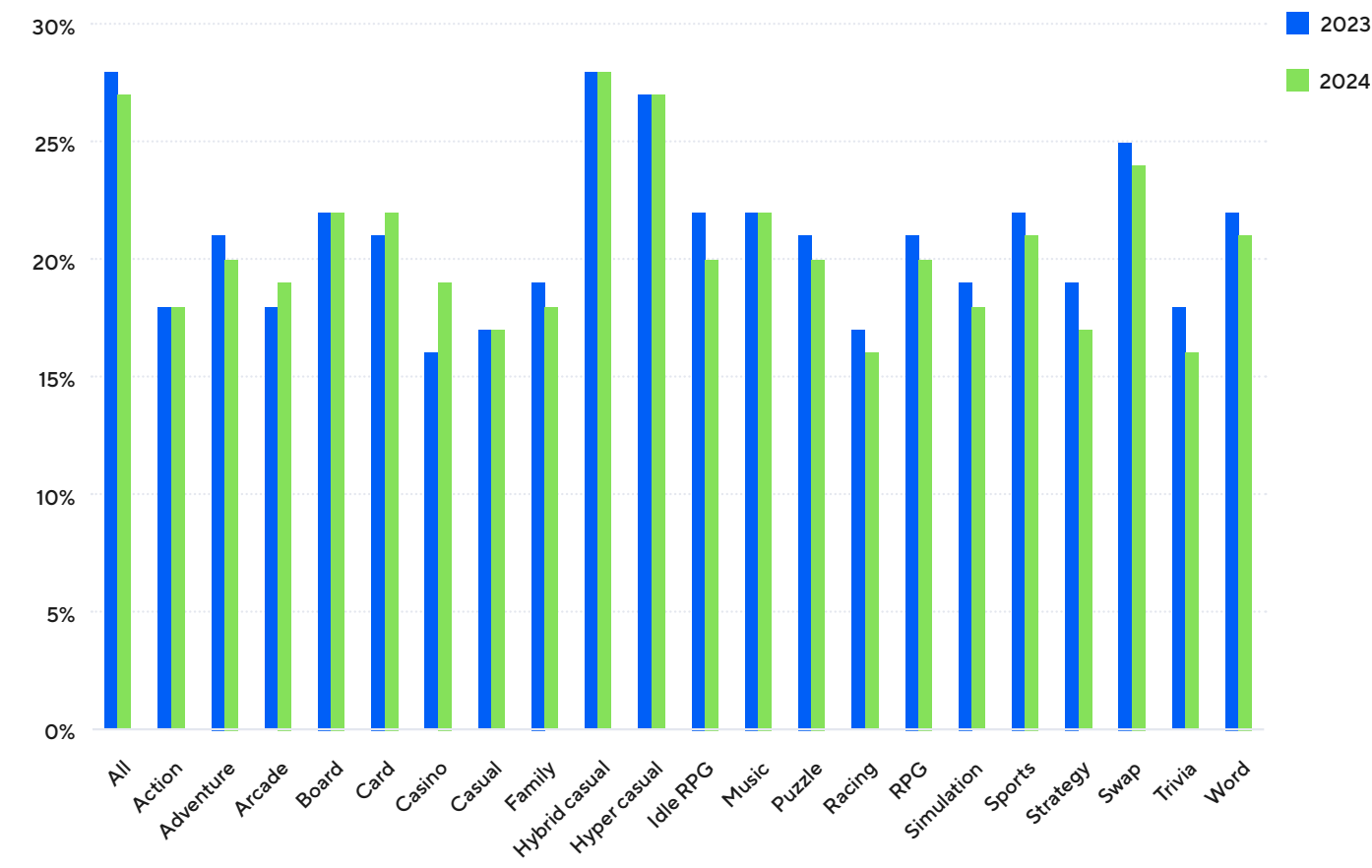
The global median gaming app sessions per user per day (day 0) declined from 1.66 in 2023 to 1.64 in 2024. Hyper and hybrid casual games remained on top with 1.82 sessions each (though this declined sharply starting at day 1), despite a minor drop from 1.86. Casino apps stood out with an increase from 1.57 to 1.65, while arcade apps also saw a modest rise from 1.61 to 1.63.

Gaming app sessions per user per day on day 0 by region and country 2023 - 2024



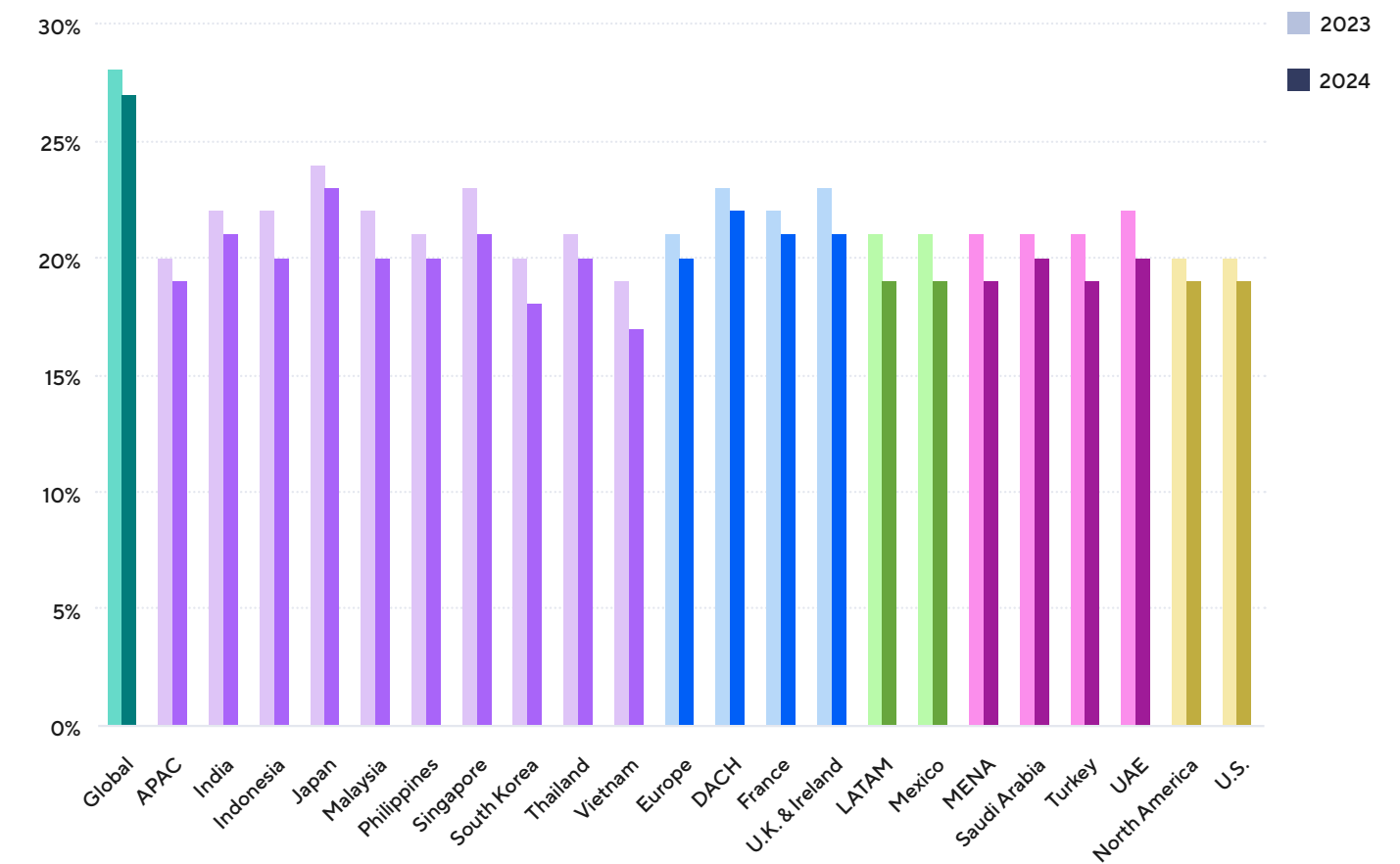
APAC markets continued to show strong engagement, though sessions per user in India (1.76 to 1.71) and Indonesia (1.81 to 1.73) dipped in 2024. Japan (1.78 to 1.74) and the Philippines (1.75 to 1.69) also experienced declines. Europe, MENA, and LATAM hovered between 1.61 and 1.65, while Turkey dropped from 1.73 to 1.66. North America and the U.S. recorded the lowest session counts at 1.58 and 1.57.

Gaming app day 1 retention rate 2023 - 2024 (Global)



Day 1 retention rates for gaming apps globally decreased from 28% to 27% in 2024. Board and card games held steady at 22%, casino climbed from 16% to 19%, and strategy (17%) and trivia (16%) declined. Hybrid and hyper casual games maintained their lead at 28% and 27%—but despite strong early engagement from these genres, by day 30, both dropped to just 2% (vs. the overall games average of 5%).

Gaming app day 1 retention rate by region and country 2023 - 2024



Most regions and markets saw day 1 retention decline in 2024, with APAC dropping from 20% to 19%, and North America and the U.S. both slipping from 20% to 19%. Japan (24% to 23%) and Indonesia (22% to 20%) also saw decreases. Vietnam also recorded a significant drop, falling from 19% to 17%. DACH maintained the highest retention in Europe at 22%.

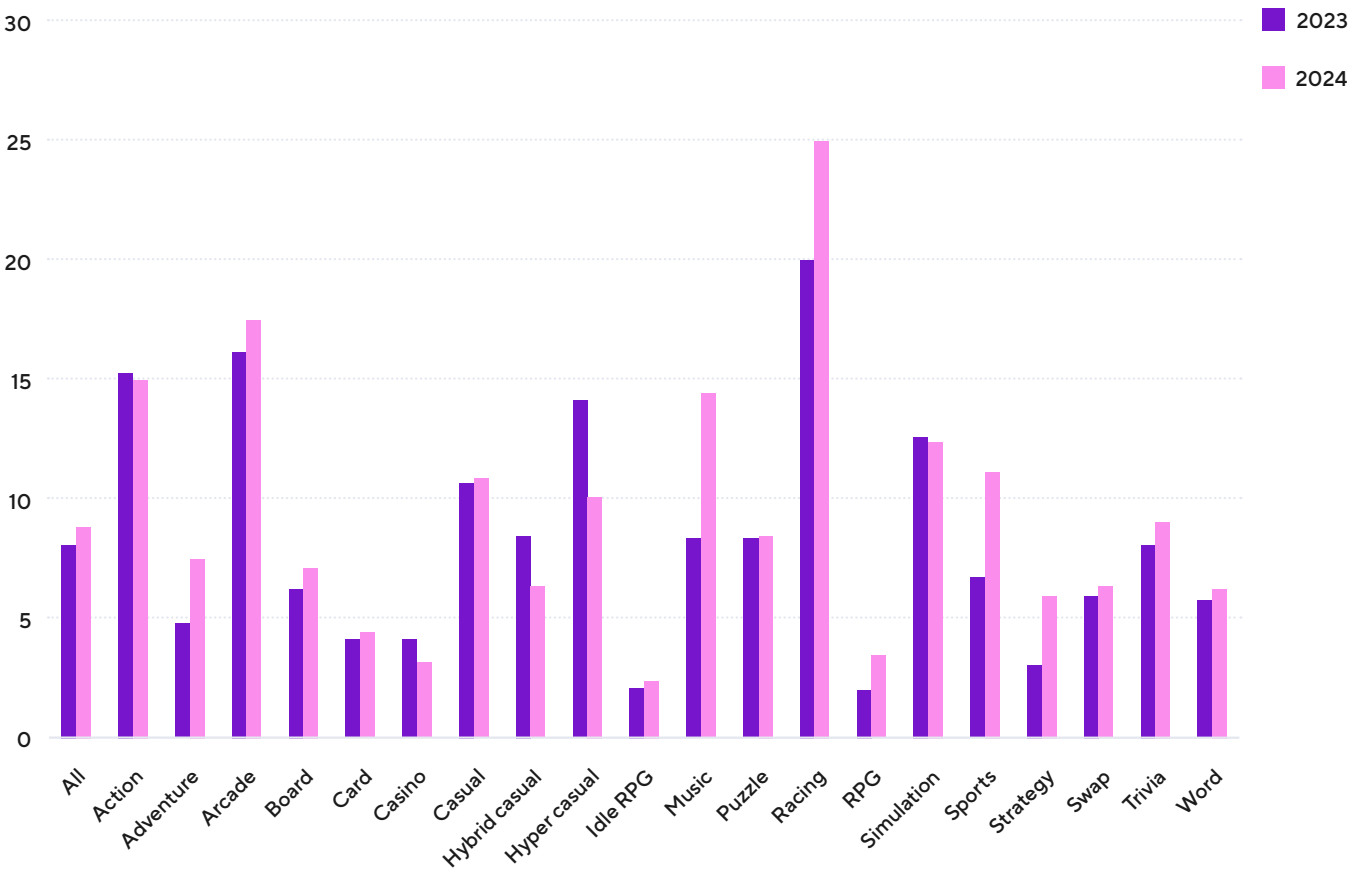
PART 2

Cracking the code on cost and performance

Cost per install, impression, and click + partners per app

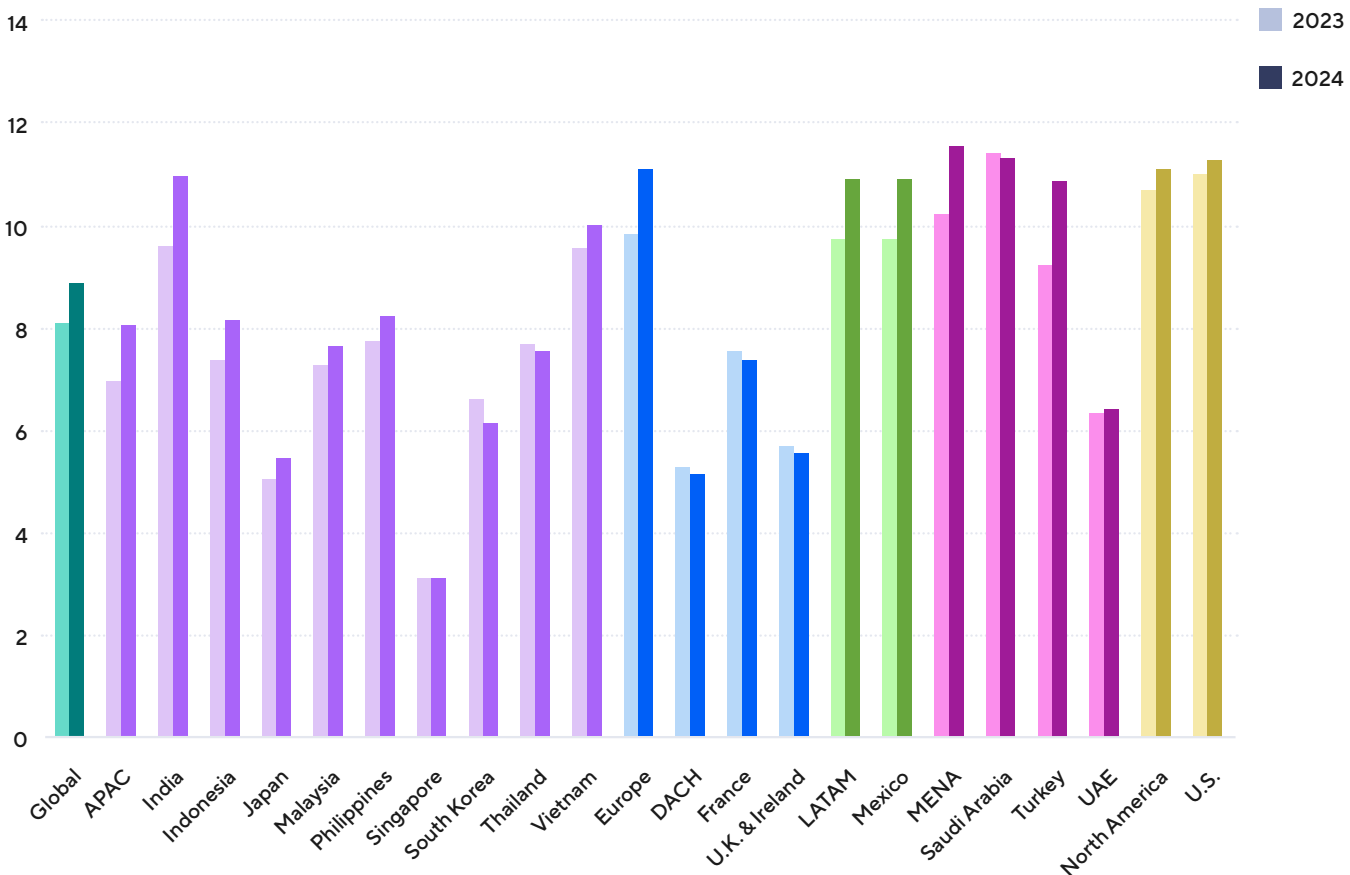


Gaming app IPM 2023 - 2024 (Global)



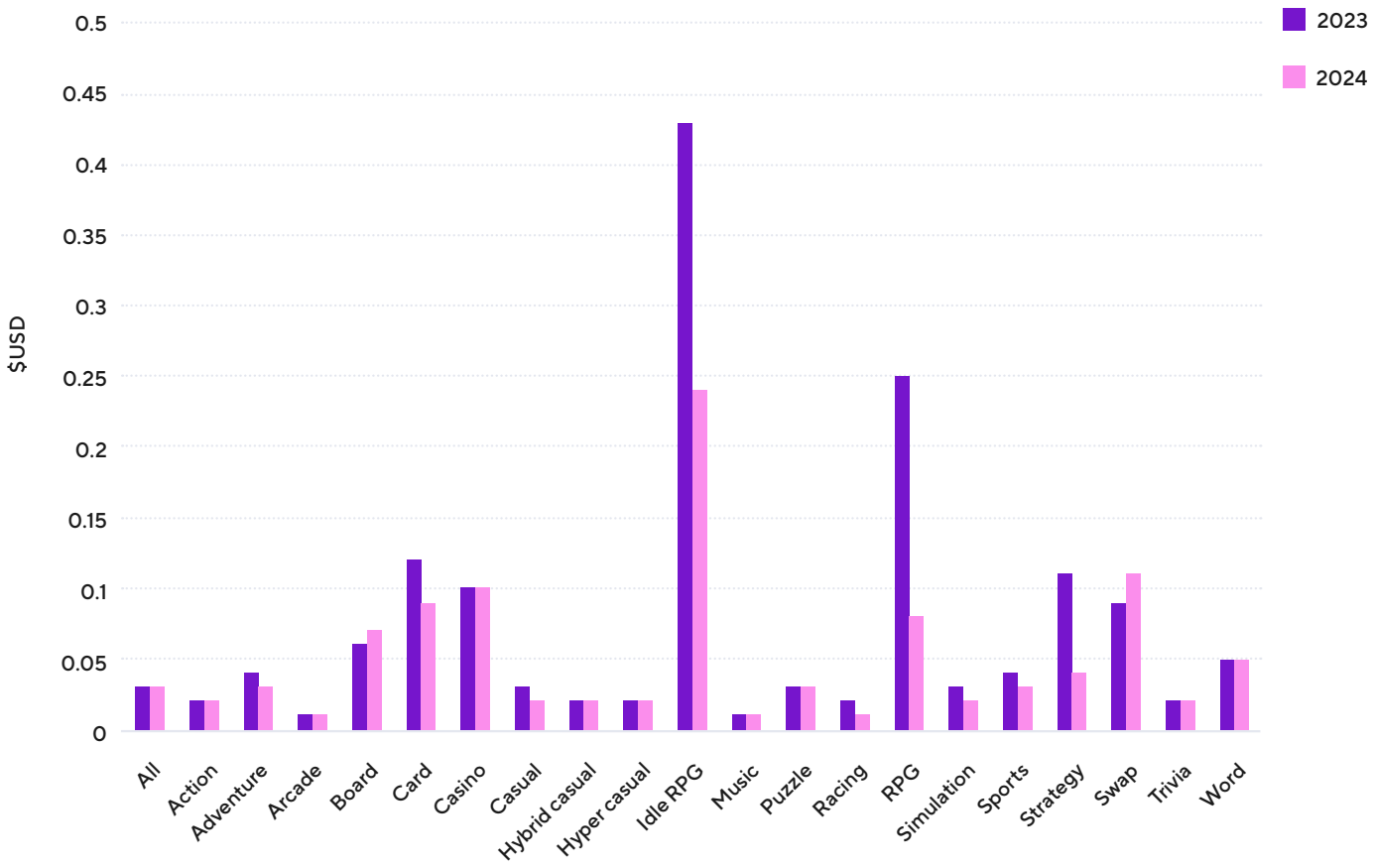
Global installs per mille (IPM) for gaming apps climbed from 8.1 in 2023 to 8.86 in 2024. Racing maintained the highest IPM, increasing from 19.94 to 24.99, while music apps saw the most growth, nearly doubling from 8.31 to 14.41. Adventure (4.79 to 7.48) and strategy (3.02 to 5.93) also increased. Hyper casual dropped from 14.12 to 10.09, and hybrid casual declined from 8.42 to 6.33.

Gaming app IPM by region and country 2023 - 2024

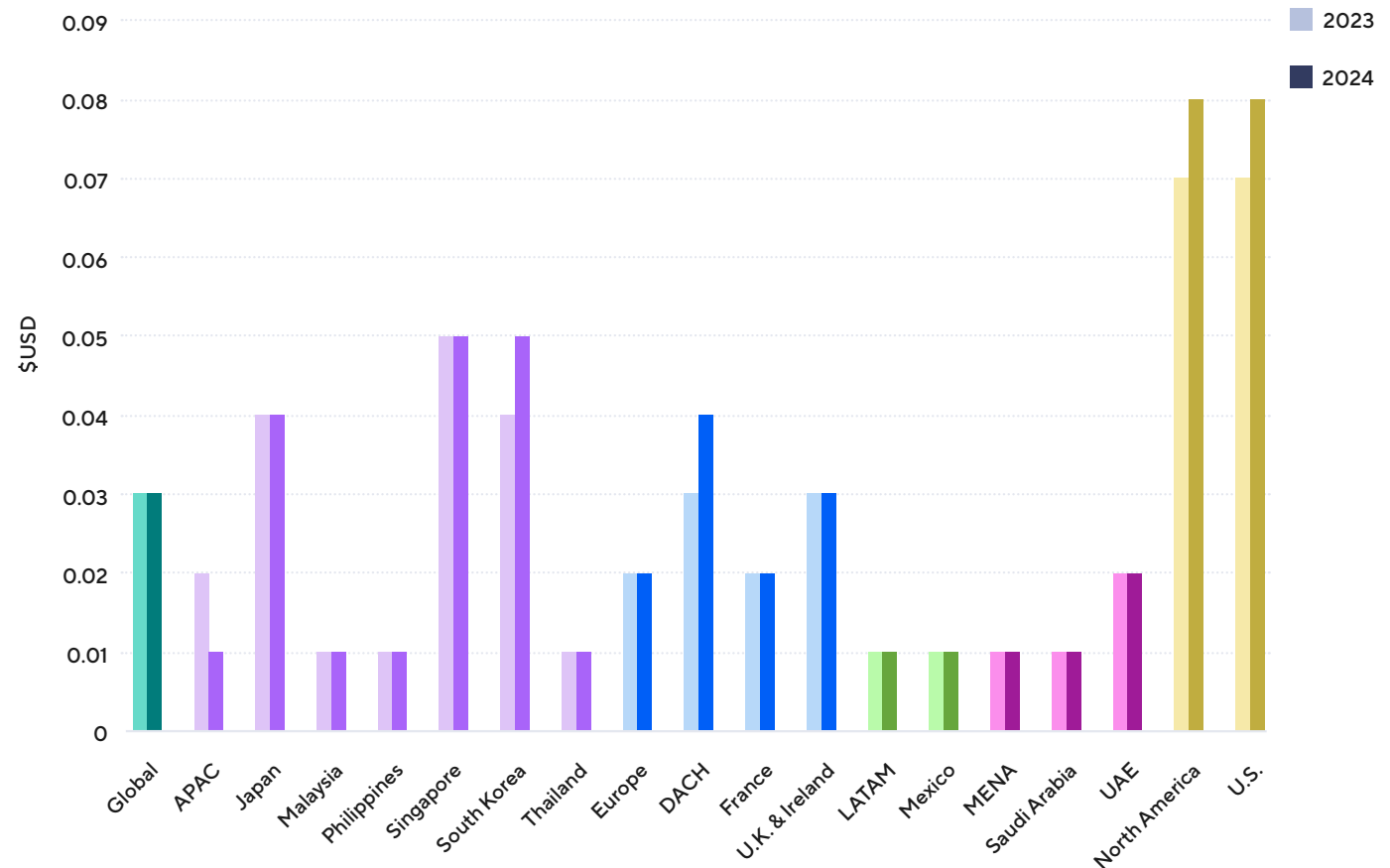


In Europe, IPM climbed from 9.83 to 11.07, while MENA increased from 10.21 to 11.56. India recorded one of the biggest boosts, up from 9.58 to 10.94. LATAM and Mexico both grew to 10.91, and North America saw an uptick from 10.68 to 11.11. South Korea's IPM dipped from 6.58 to 6.15, and DACH declined from 5.29 to 5.15.

Gaming app CPC 2023 - 2024 (Global)



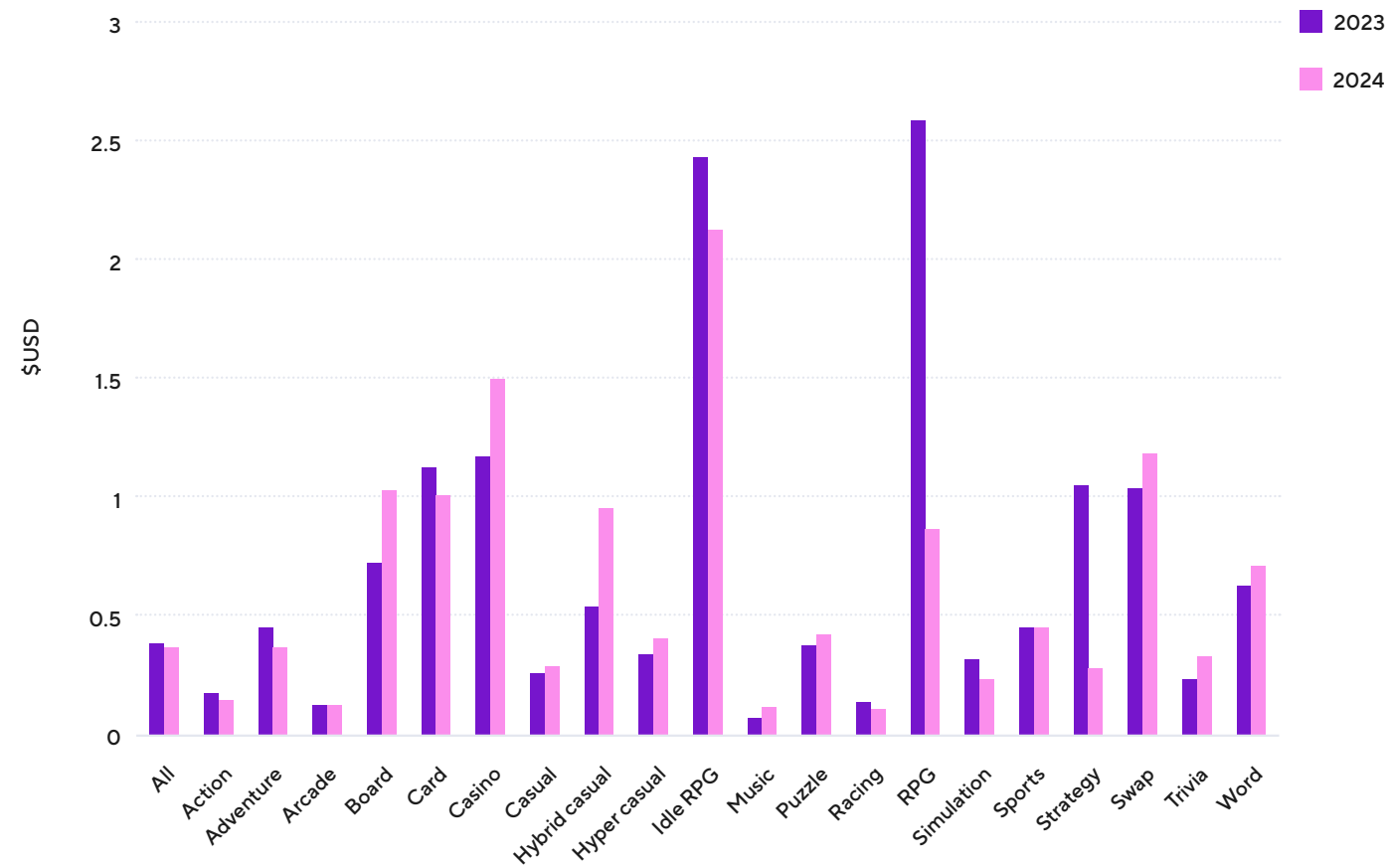
Gaming app CPC by region and country 2023 - 2024



Cost per click (CPC) for gaming apps remained stable in 2024, holding at a global median of \$0.03. Idle RPG dropped from \$0.43 to \$0.24, while RPG declined from \$0.25 to \$0.08, signaling lower competition for clicks in these categories. Strategy CPC also fell from \$0.11 to \$0.04. Board games rose from \$0.06 to \$0.07 and swap games increased from \$0.09 to \$0.11.

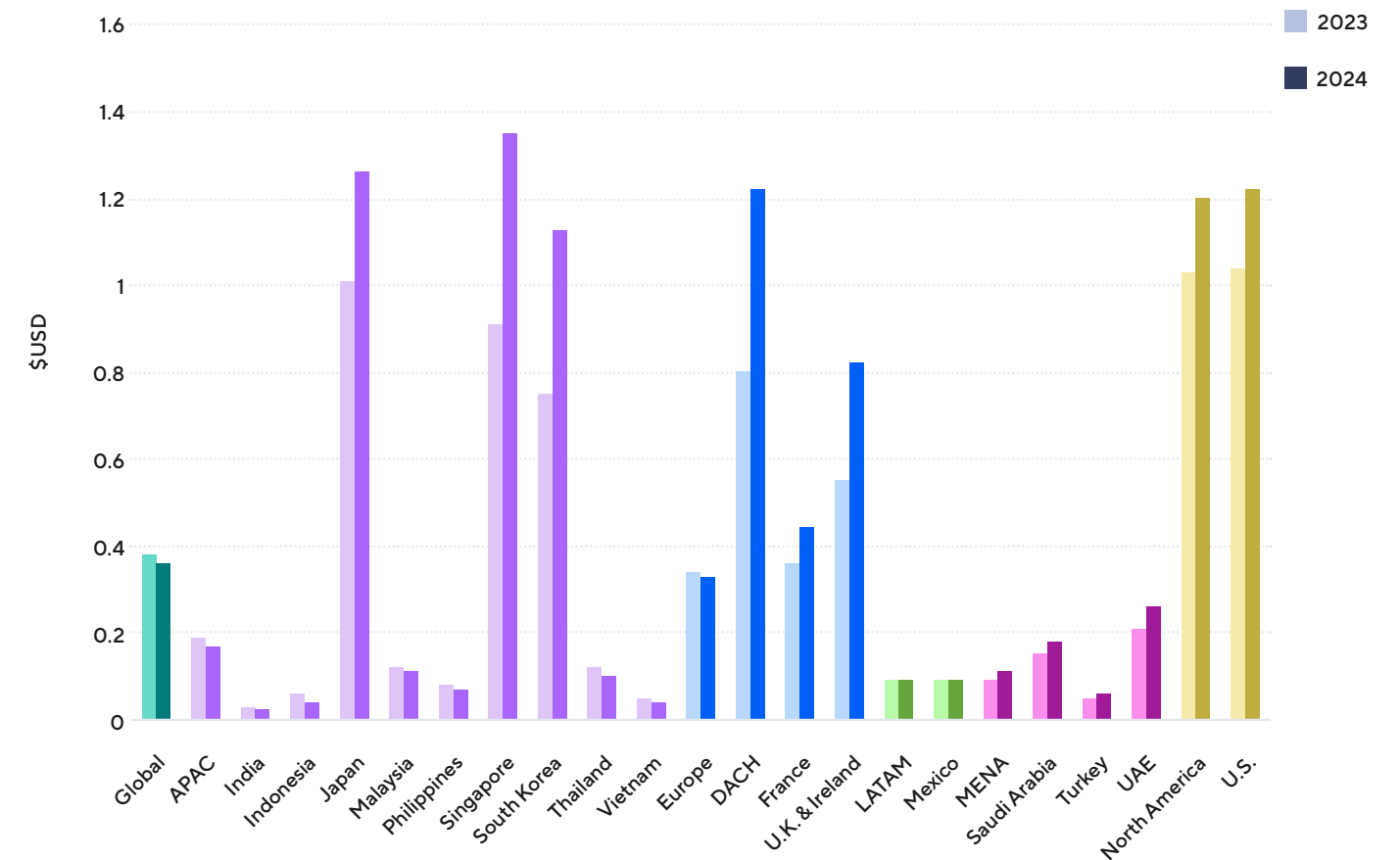
APAC's CPC decreased in 2024, falling from \$0.02 to \$0.01, while North America and the U.S. increased from \$0.07 to \$0.08. DACH also saw a bump from \$0.03 to \$0.04, while Singapore (remaining at \$0.05) and South Korea (increasing from \$0.04 to \$0.05) maintained relatively high CPCs compared to most markets.

Gaming app CPI 2023 - 2024 (Global)

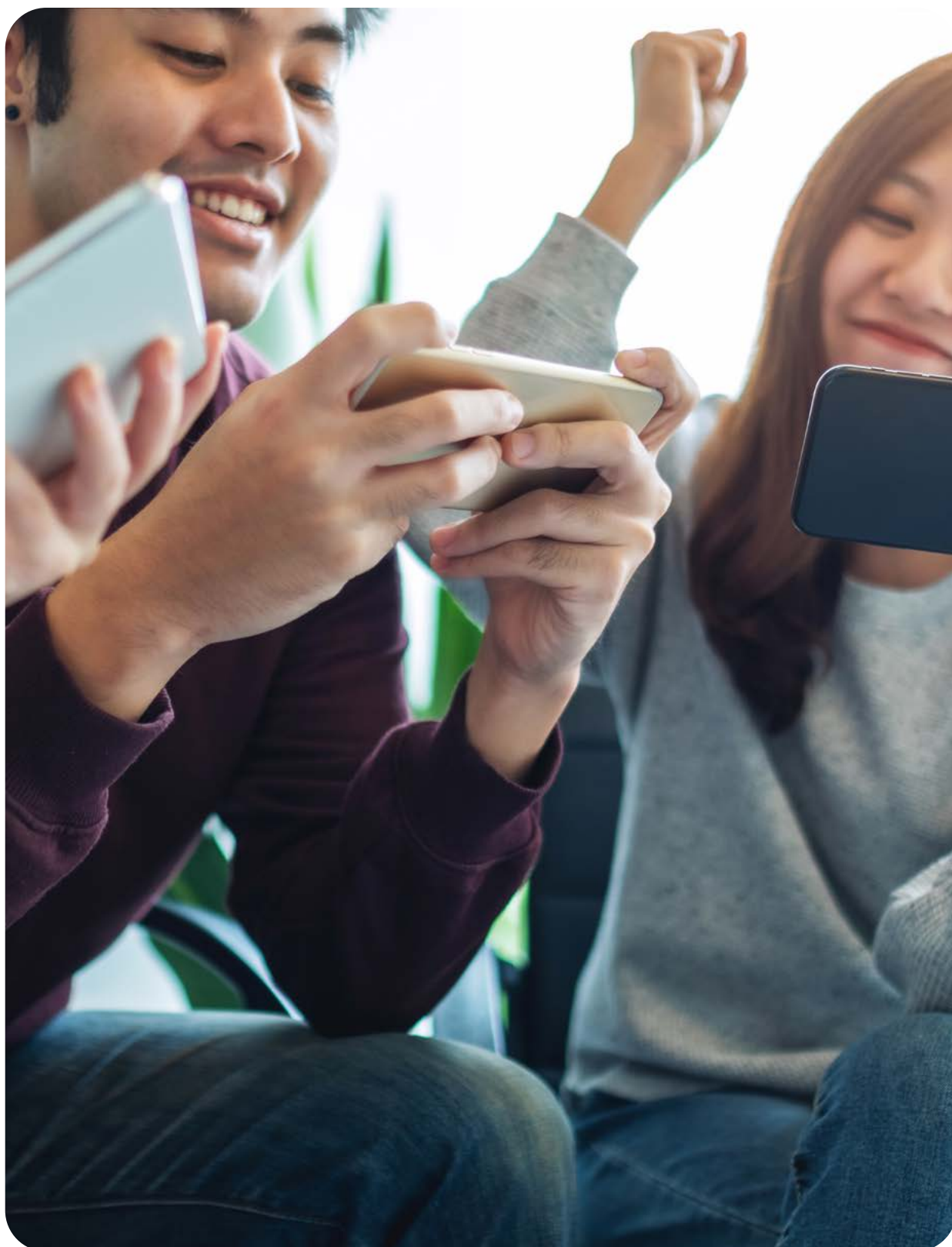


In 2024, the median cost per install (CPI) for gaming apps decreased from \$0.38 to \$0.36. Casino apps climbed from \$1.17 to \$1.5, which, alongside the increase in organic installs, could also be driven by rising competition in the U.S. and LATAM. Hyper casual games climbed from \$0.33 to \$0.4, while hybrid casual nearly doubled, up from \$0.54 to \$0.95.

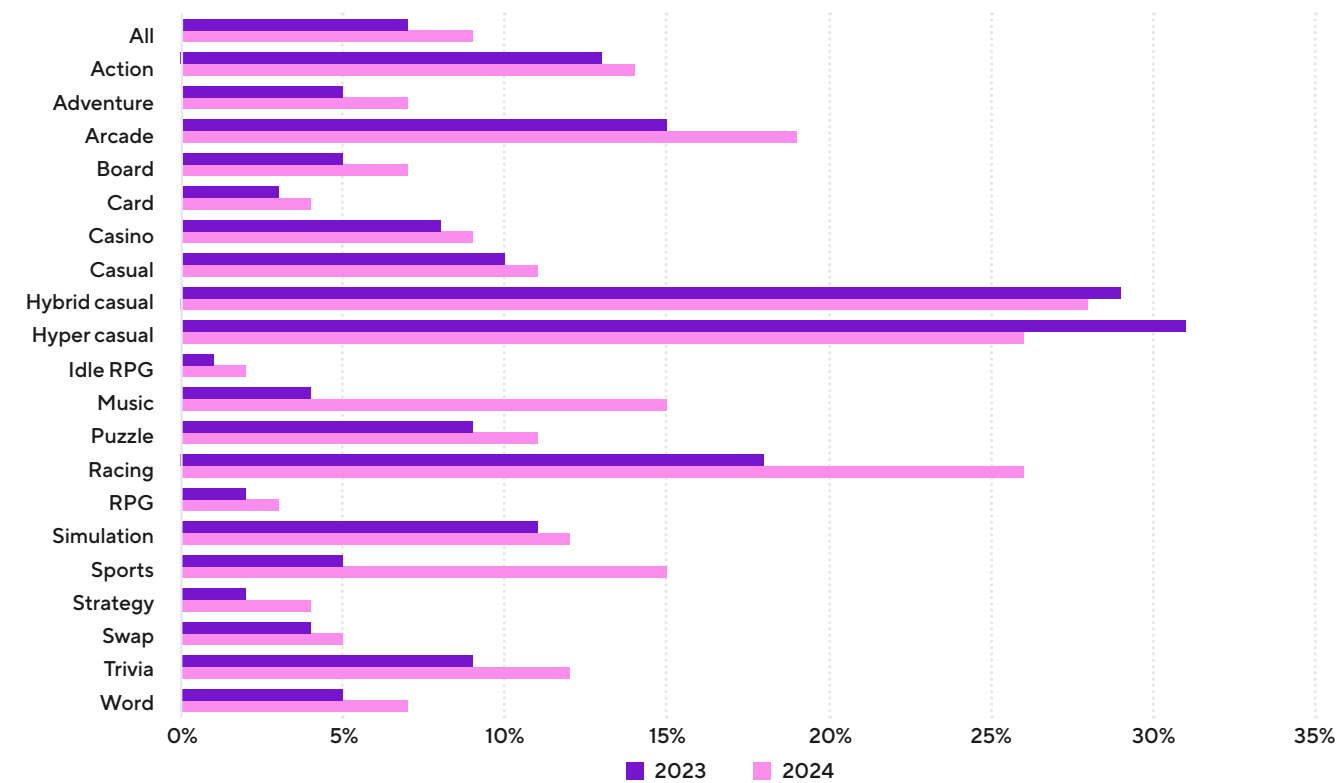
Gaming app CPI by region and country 2023 - 2024



North America (\$1.03 to \$1.2) and the U.S. (\$1.04 to \$1.22) saw notable increases in CPI, while Singapore had the biggest jump, rising from \$0.91 to \$1.35. DACH also climbed from \$0.8 to \$1.22, while APAC (\$0.19 to \$0.17) and India (\$0.03 to \$0.02) decreased.

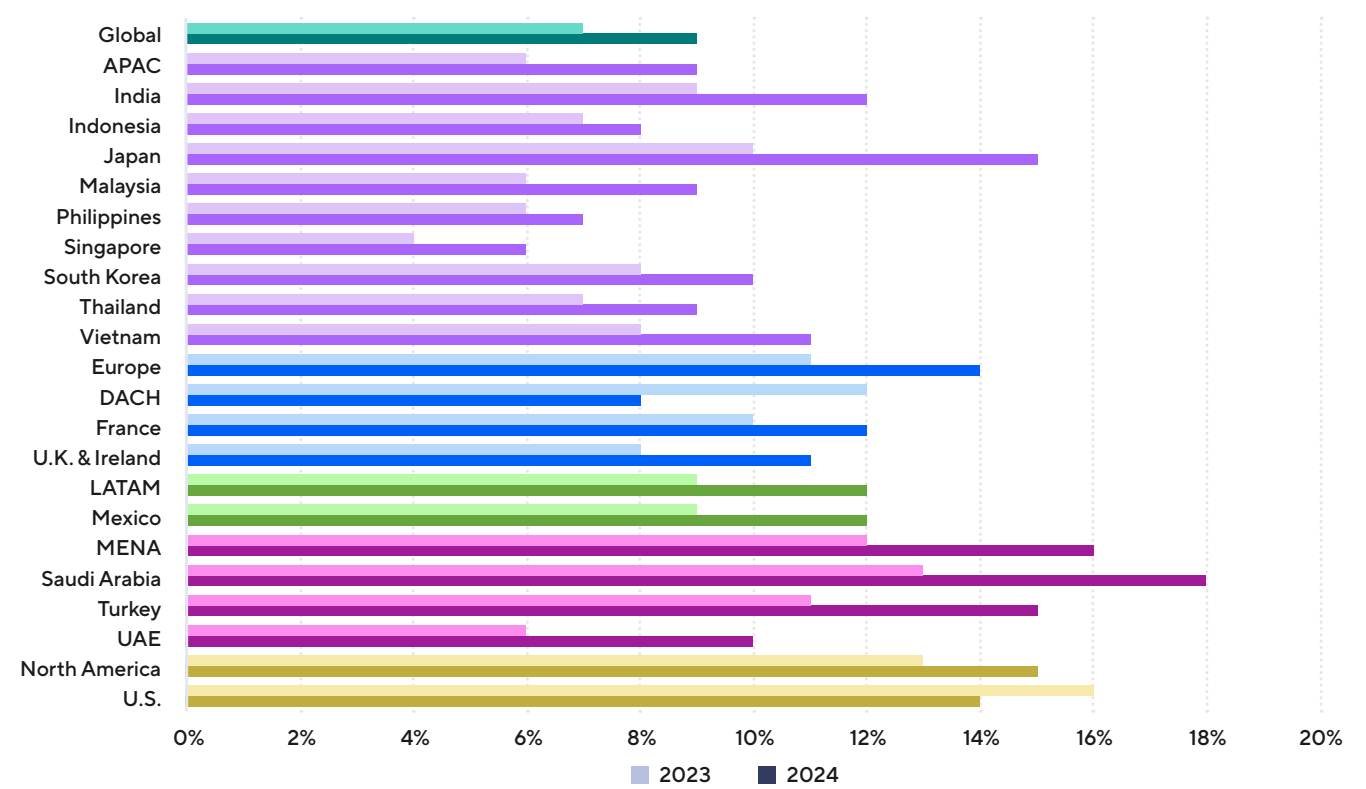


Gaming app CTR 2023 - 2024 (Global)



The average global click-through rate (CTR) increased from 7% in 2023 to 9% in 2024. Racing games experienced the largest jump, rising from 18% to 26%, while puzzle and music games also saw growth, reaching 11% and 15%. Hybrid casual games, now leading with a CTR of 28%, declined from 29%. Hyper casual games also continued to perform well, maintaining a CTR of 26%, despite a dip from 31%.

Gaming app CTR by region and country 2023 - 2024

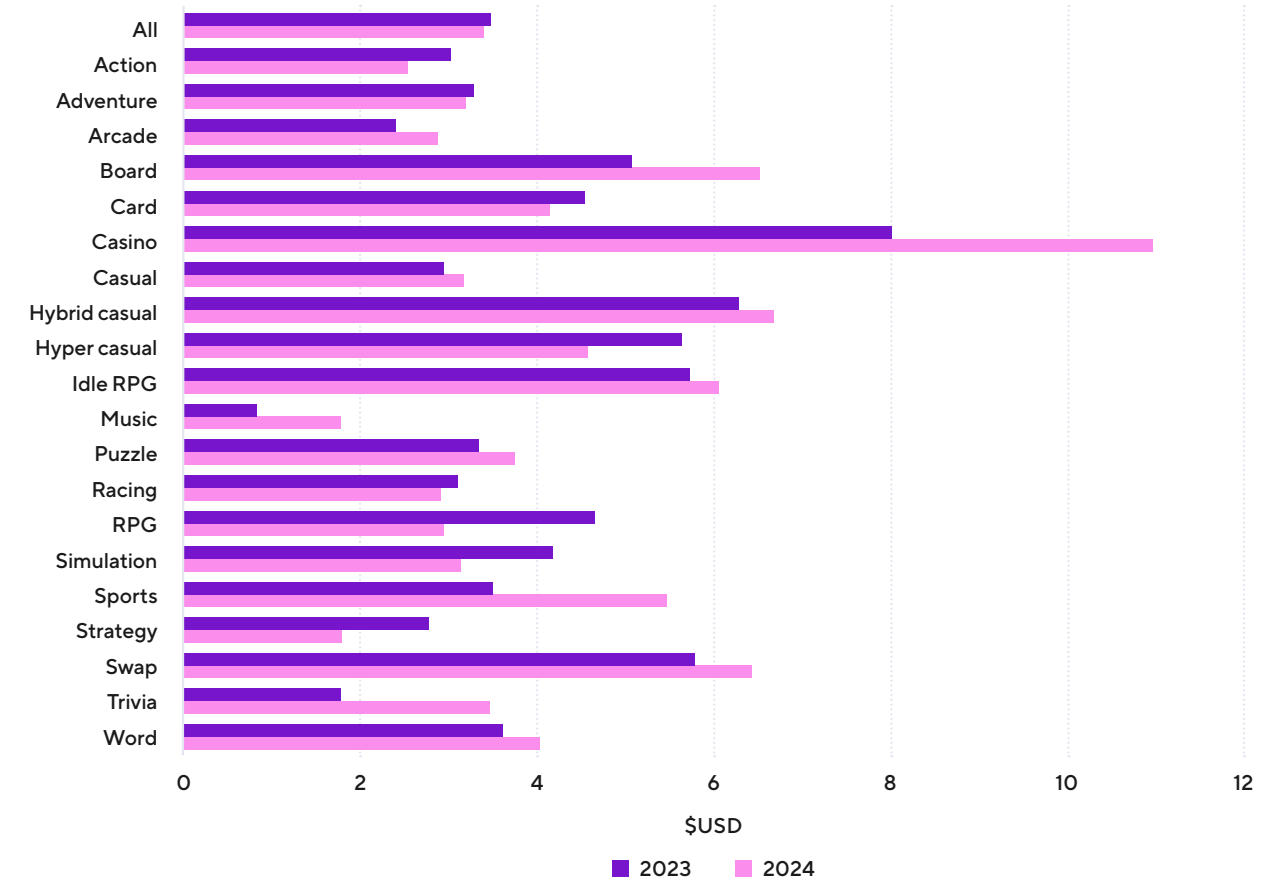


TIP

In regions like MENA, which have shown notable growth, undertake localized A/B testing to assess creative approaches, integrating cultural preferences and timing. Leverage AI to optimize CTR by automating creative testing and targeting. For insight into mobile growth throughout Ramadan, read our guide: [What app marketers need to succeed during Ramadan.](#)

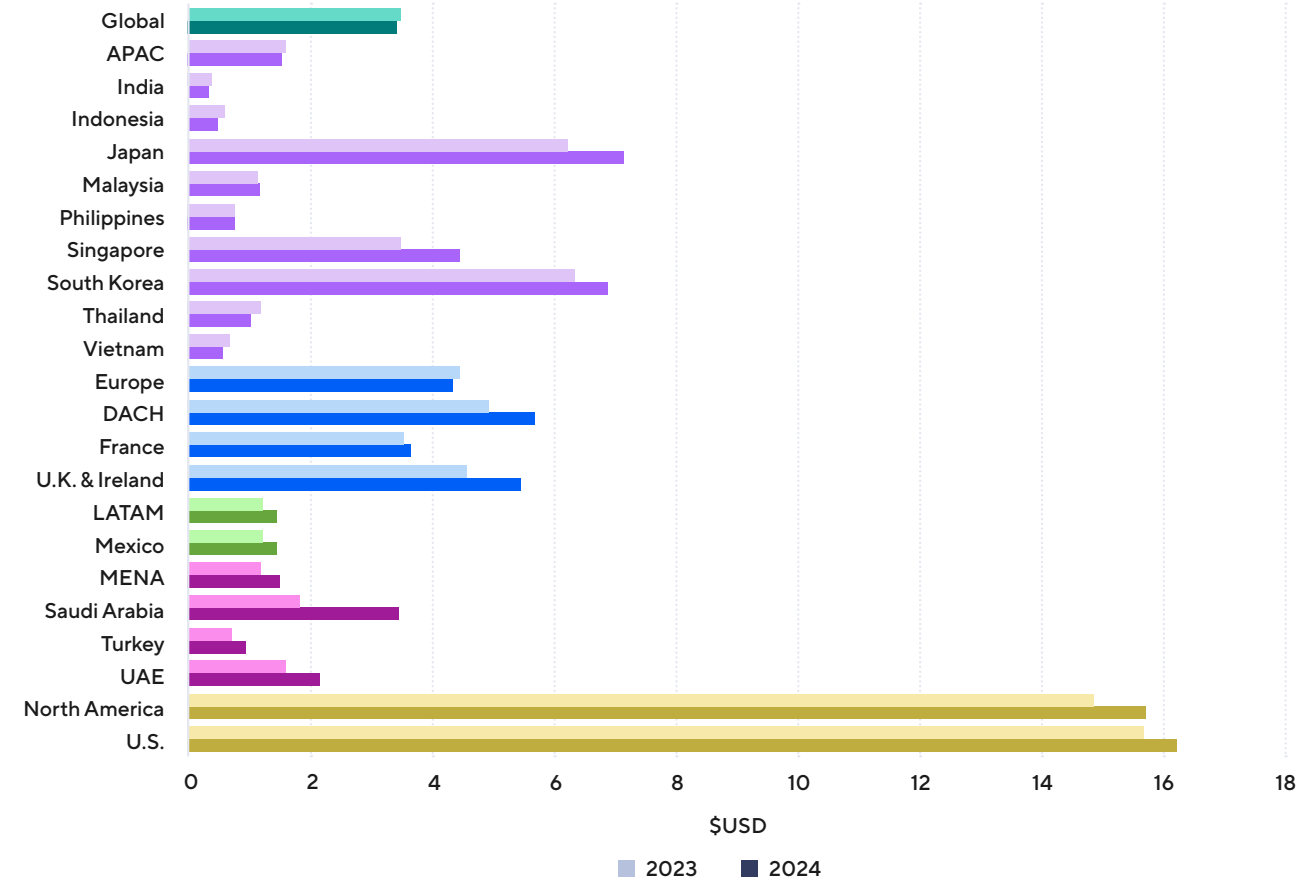
CTR in the U.S. decreased from 16% to 14% in 2024, while North America as a whole improved, up from 13% to 15%. All markets in MENA saw boosts, with Saudi Arabia increasing from 13% to 18% and the UAE from 6% to 10%. The numbers in Europe (11 to 14%), LATAM (9 to 12%), and APAC (6% to 9%) also climbed. India rose from 9% to 12%.

Gaming app CPM 2023 - 2024 (Global)



The median cost per mille (CPM) decreased to \$3.41 in 2024. Casino games experienced the most notable increase, jumping from \$8.01 to \$10.97. Idle RPG and puzzle games also saw increases, reaching \$6.06 and \$3.75, respectively. Genres such as racing and strategy experienced slight declines.

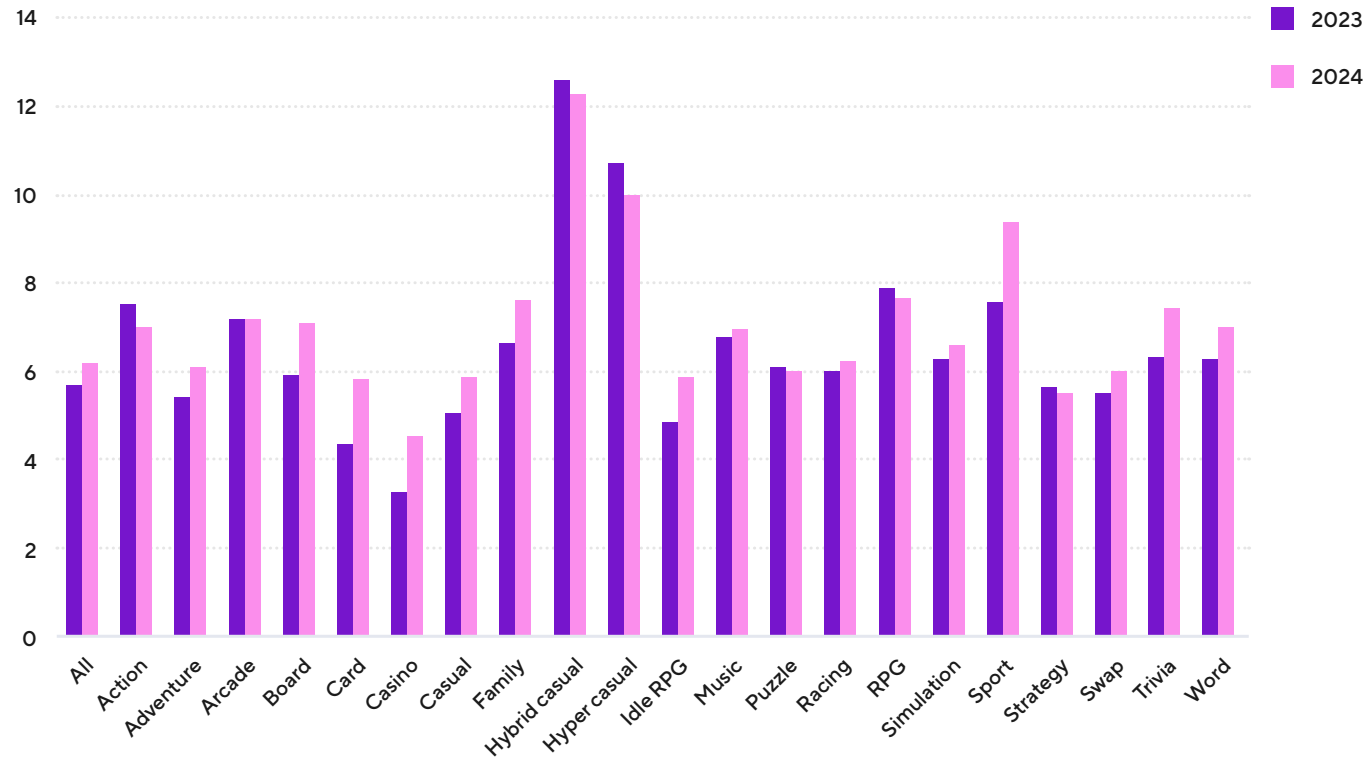
Gaming app CPM by region and country 2023 - 2024



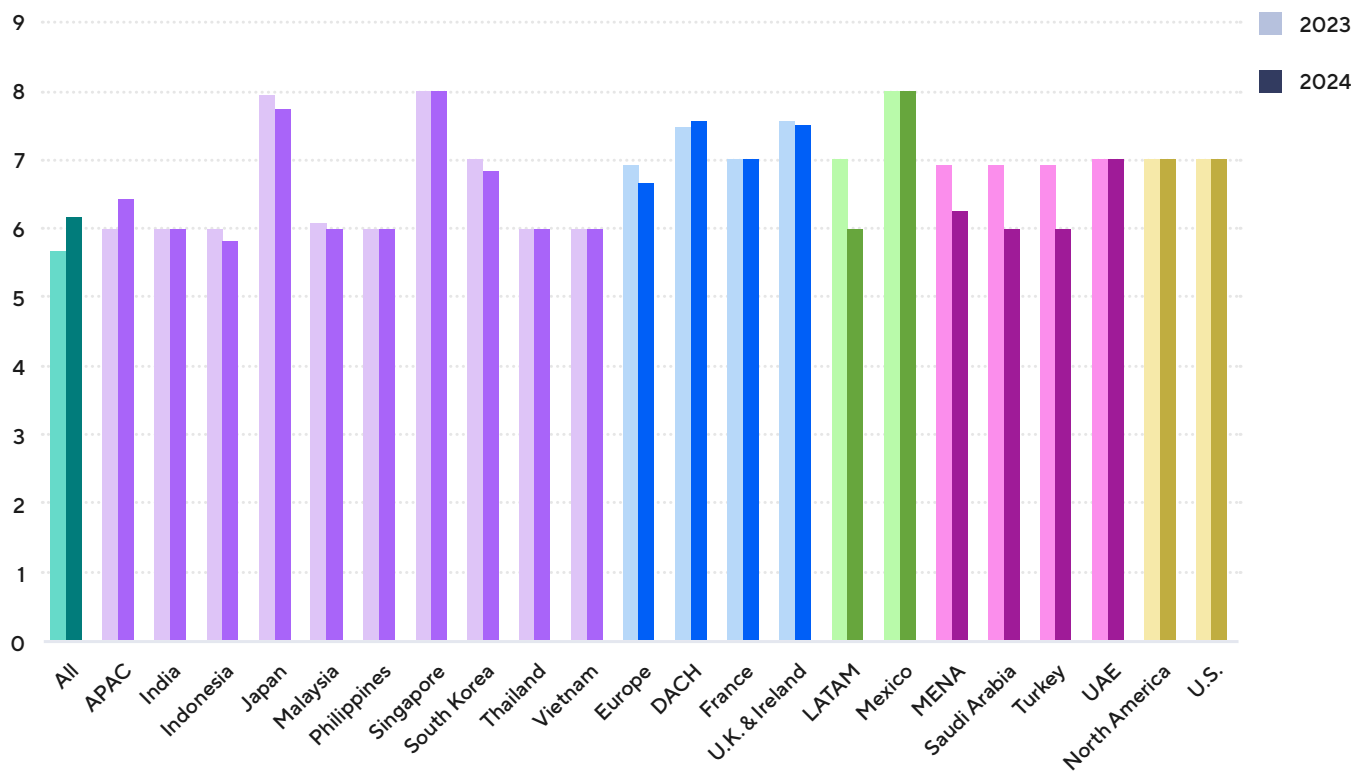
The U.S. had the highest CPM in 2024 at \$16.21, up from \$15.66 in 2023. In competitive and mature markets like the U.S., a higher CPM signals increased demand for ad space, often correlating with a higher return on investment (ROI). CPM also rose from \$1.58 to \$2.15 in the UAE and from \$1.82 to \$3.45 in Saudi Arabia. Vietnam and Indonesia both declined, with APAC overall dropping from \$1.58 to \$1.53.

In 2024, the median number of gaming partners per app increased from 5.7 to 6.2, highlighting a growing trend toward diversifying acquisition strategies. This shift correlates with higher paid media share and a reduction in CPI. Sports games saw the largest jump, reaching 9.4 partners. Hybrid casual and hyper casual games maintained high partner numbers, at 12.3 and 10. Family and trivia also increased their channel mix.

Gaming partners per app 2023 - 2024 (Global)



Gaming partners per app by region and country 2023 - 2024



TIP

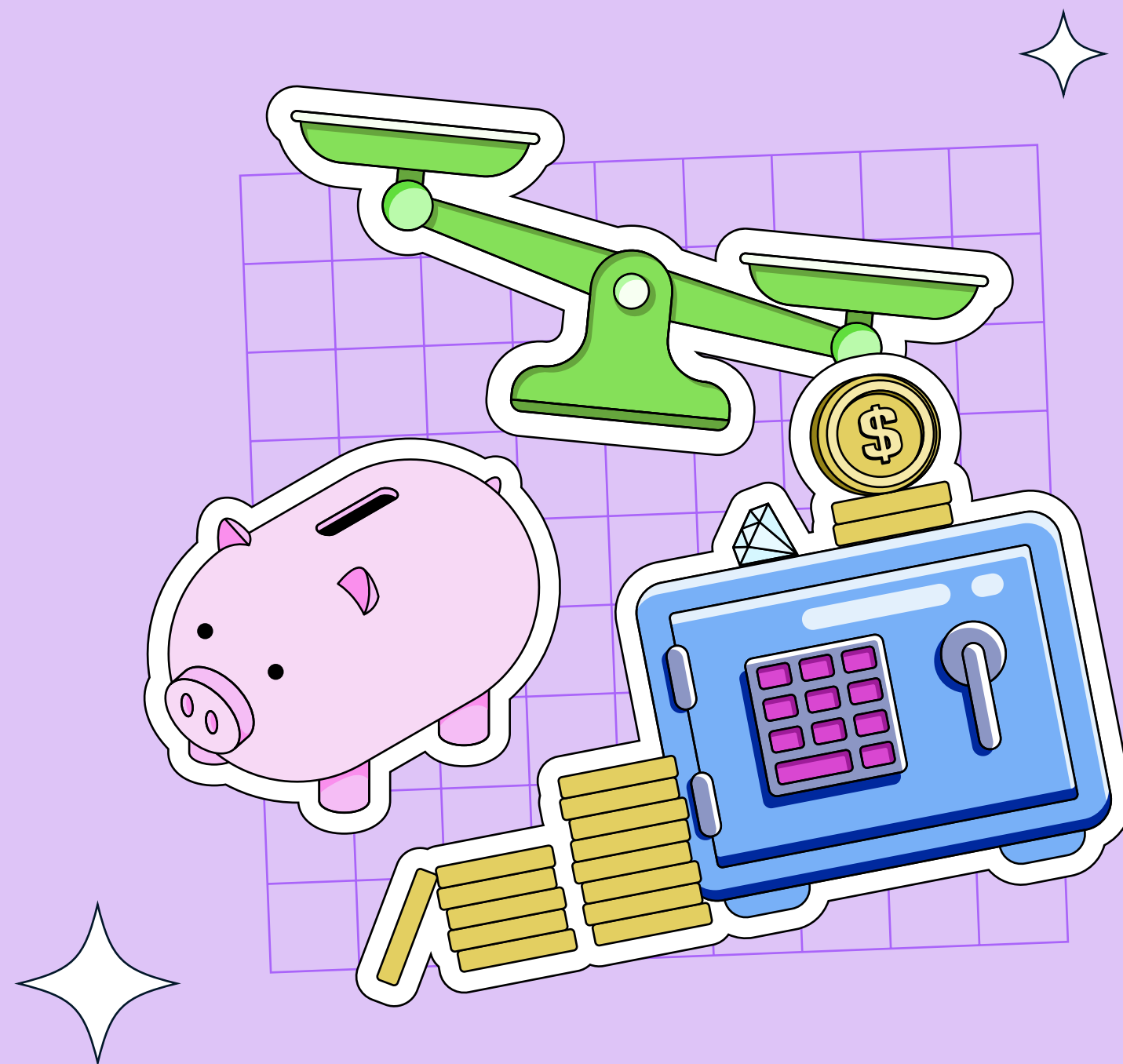
Expanding partnerships strategically can drive scalability, but marketers must regularly evaluate performance. Focus on key metrics like ROI, user retention, and LTV to identify top-performing channels.

Singapore and Mexico maintained the highest partner numbers, at 8 partners per app. North America and Europe both remained steady with 7 and 6.92 partners. In MENA, all markets except the UAE decreased their partner numbers.

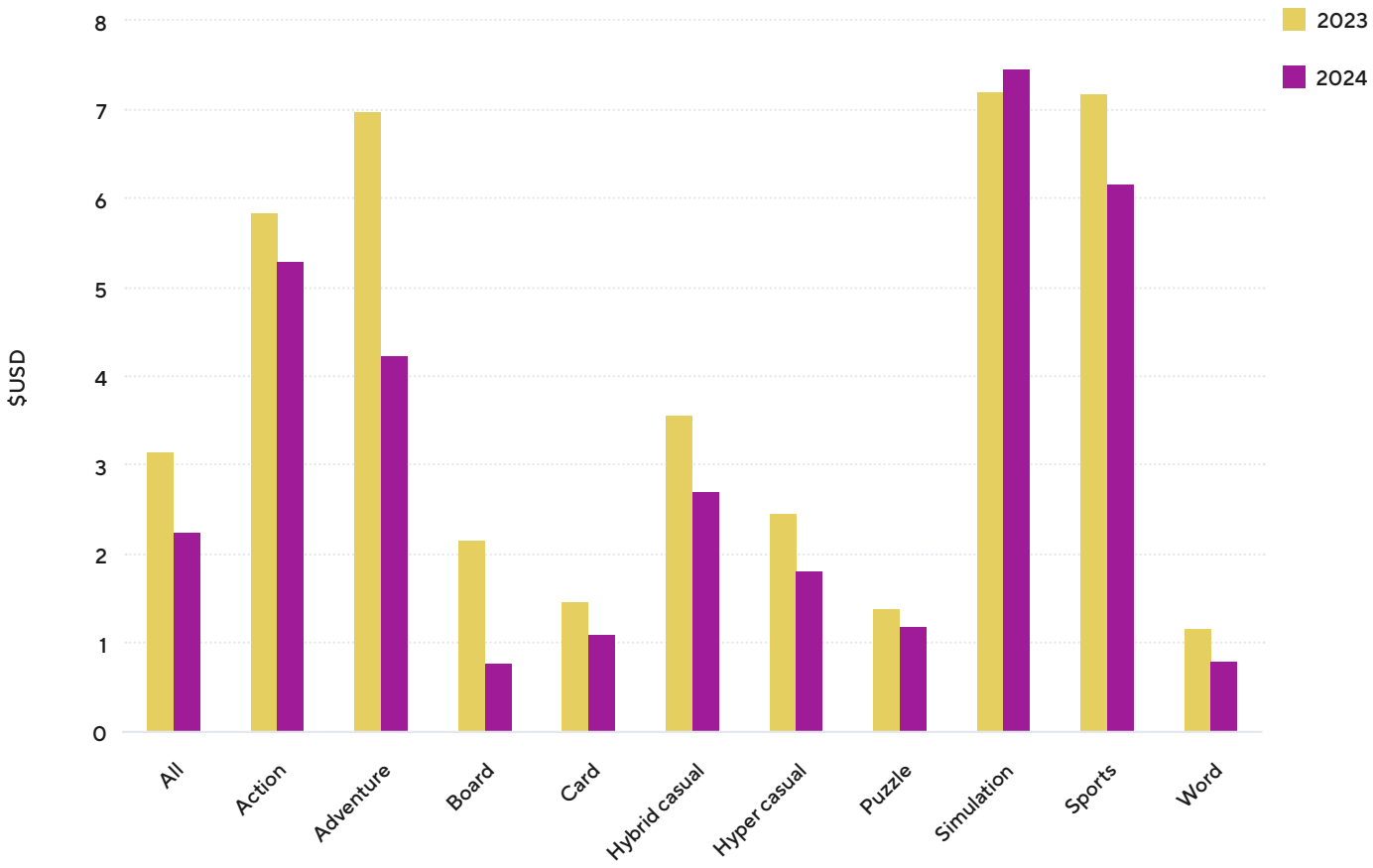
PART 3

Revenue streams

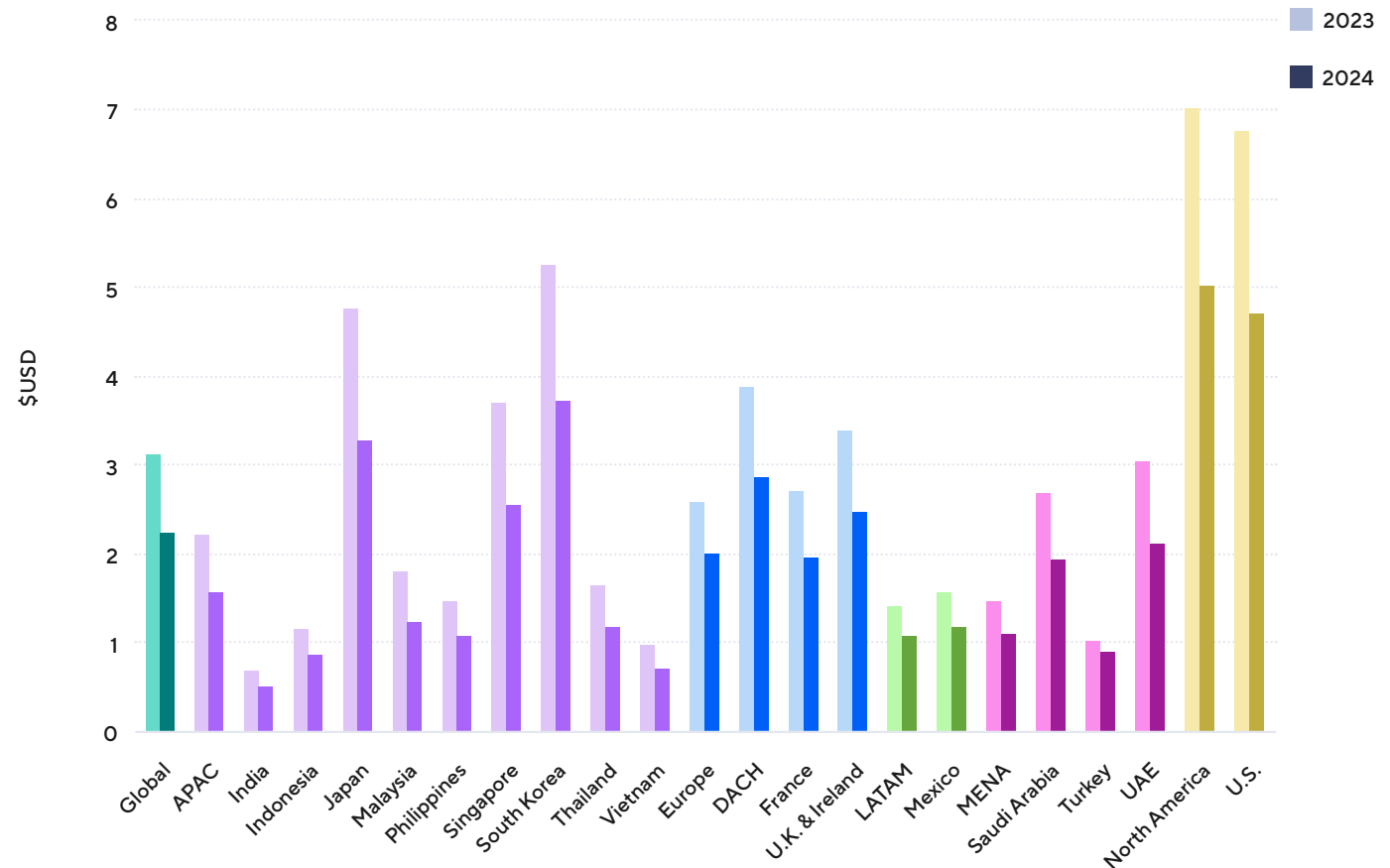
Average revenue per user



Gaming app ARPM 2023 - 2024 (Global)



Gaming app ARPM by region and country 2023 - 2024

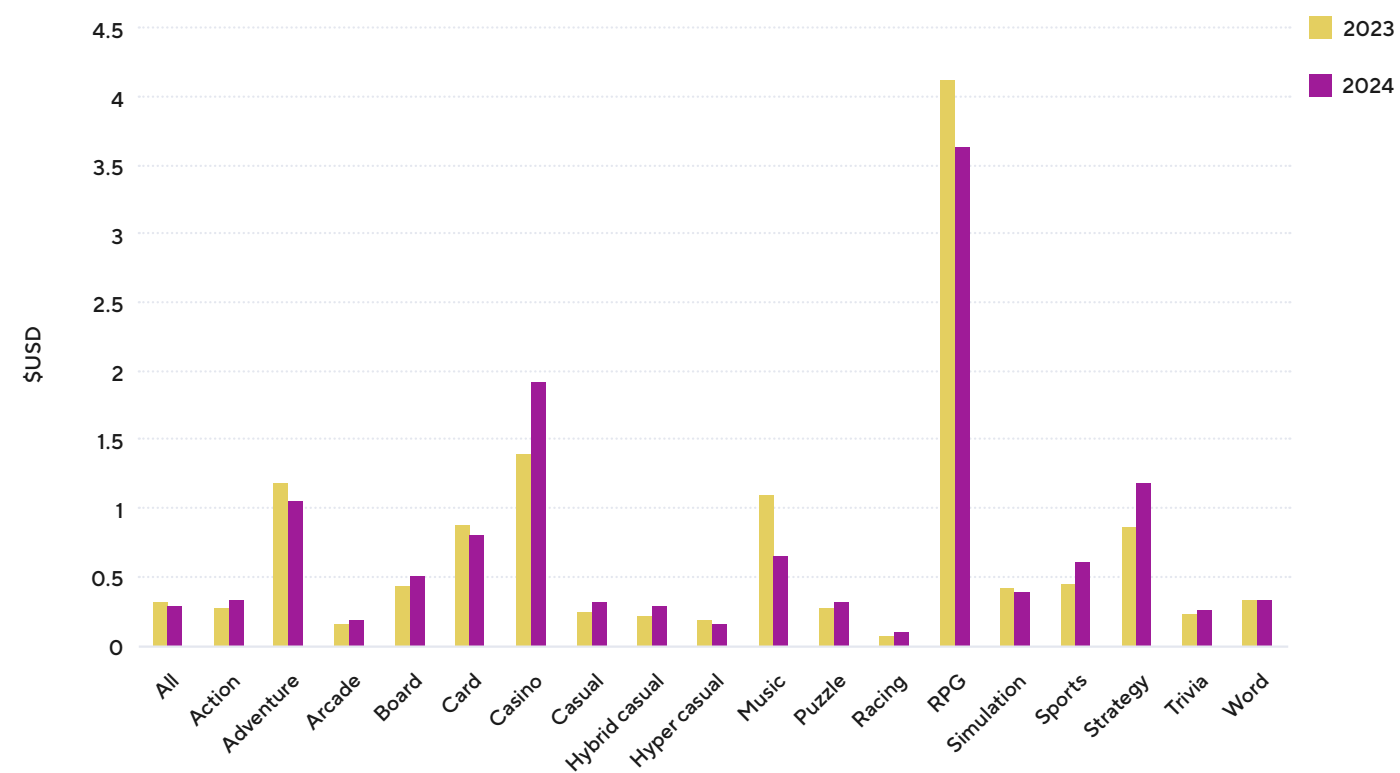


From 2023 to 2024, the global median ad revenue per mille (ARPM) for gaming apps saw a general decline across most categories. Board games dropped from \$2.13 to \$0.75. Hybrid casual also declined, falling from \$3.55 to \$2.70. The most notable reduction occurred in adventure games, down from \$6.97 to \$4.22. Simulation games saw an increase, rising from \$7.18 to \$7.45.

ARPM declined in APAC overall and in India, falling from \$2.20 to \$1.57 and \$0.69 to \$0.50, respectively. Japan also dropped from \$4.76 to \$3.27. North America and the U.S. followed suit, decreasing from \$7.01 to \$5.01 and \$6.76 to \$4.71. The declines seen in Saudi Arabia and Mexico, however, were smaller.

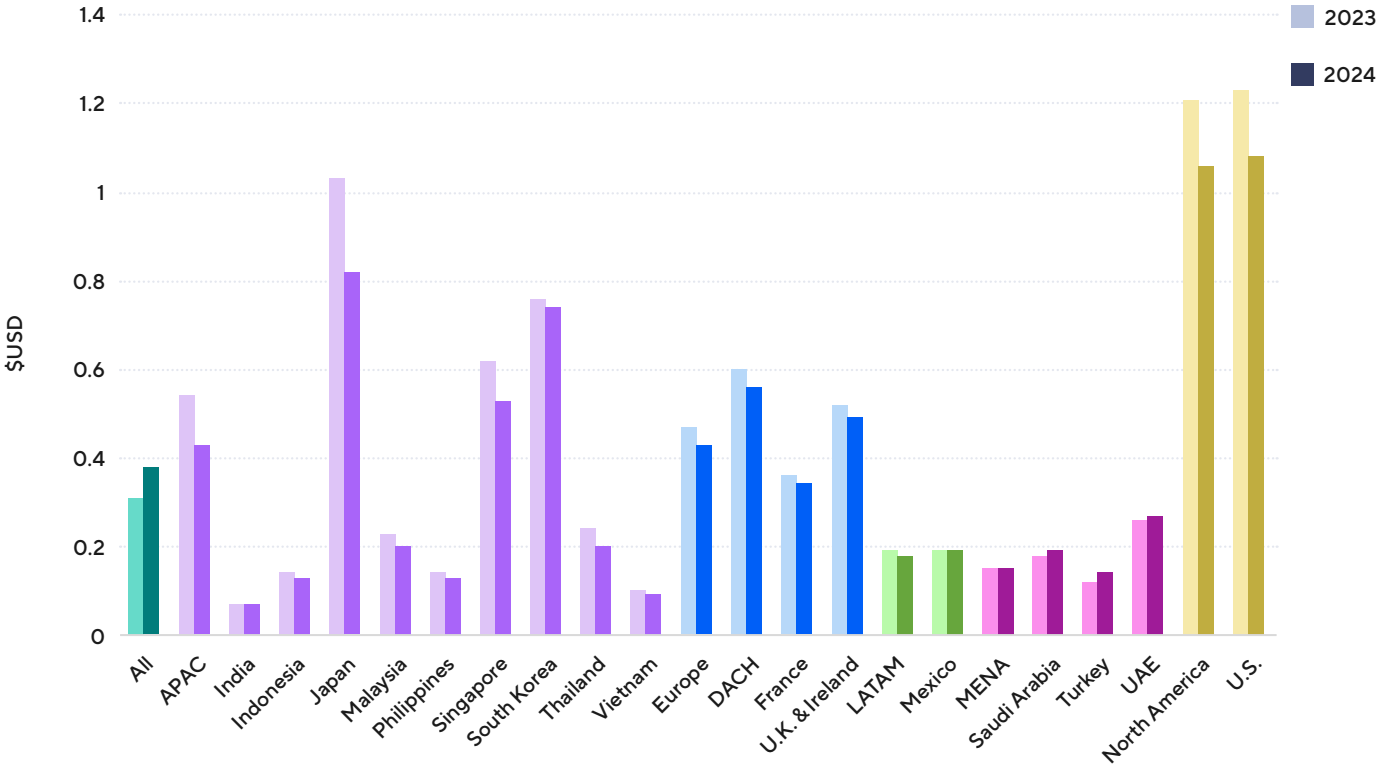


Gaming app ARPMAU 2023 - 2024 (Global)



The average revenue per monthly active user (ARPMAU) for gaming apps decreased from \$0.31 in 2023 to \$0.28 in 2024. Casino apps, however, saw a notable increase, rising from \$1.39 to \$1.92, along with strategy games, which grew from \$0.86 to \$1.18. RPG declined from \$4.12 to \$3.63, and hyper casual decreased from \$0.18 to \$0.15.

Gaming app ARPMAU by region and country 2023 - 2024

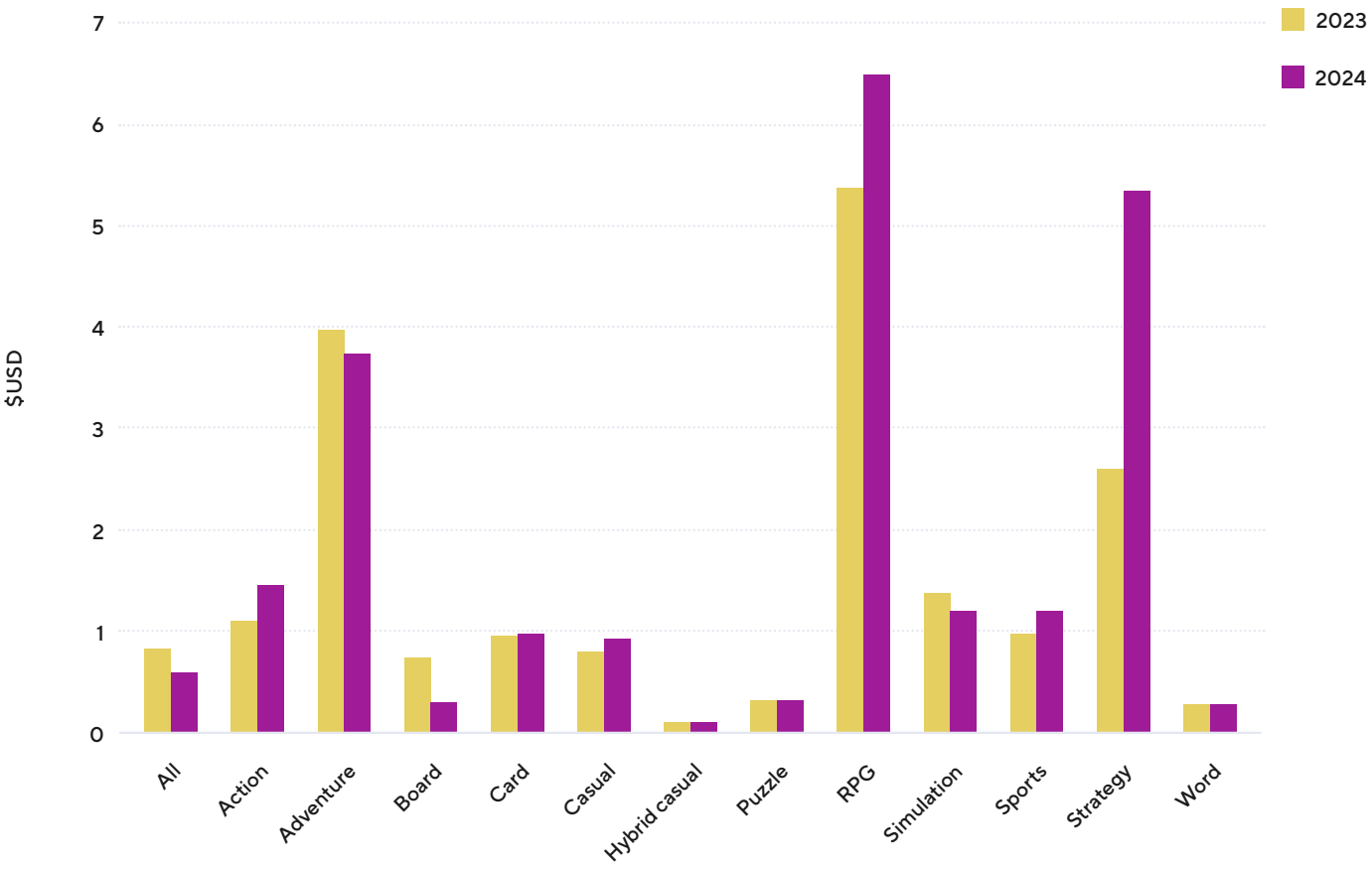


TIP

The decline in revenue per user is not necessarily a signal to reduce acquisition budgets. Use LTV prediction models to guide your UA strategy, ensuring that you focus on acquiring high-value users. Implement a post-install engagement strategy to retain users, monetize effectively, and maximize long-term value.

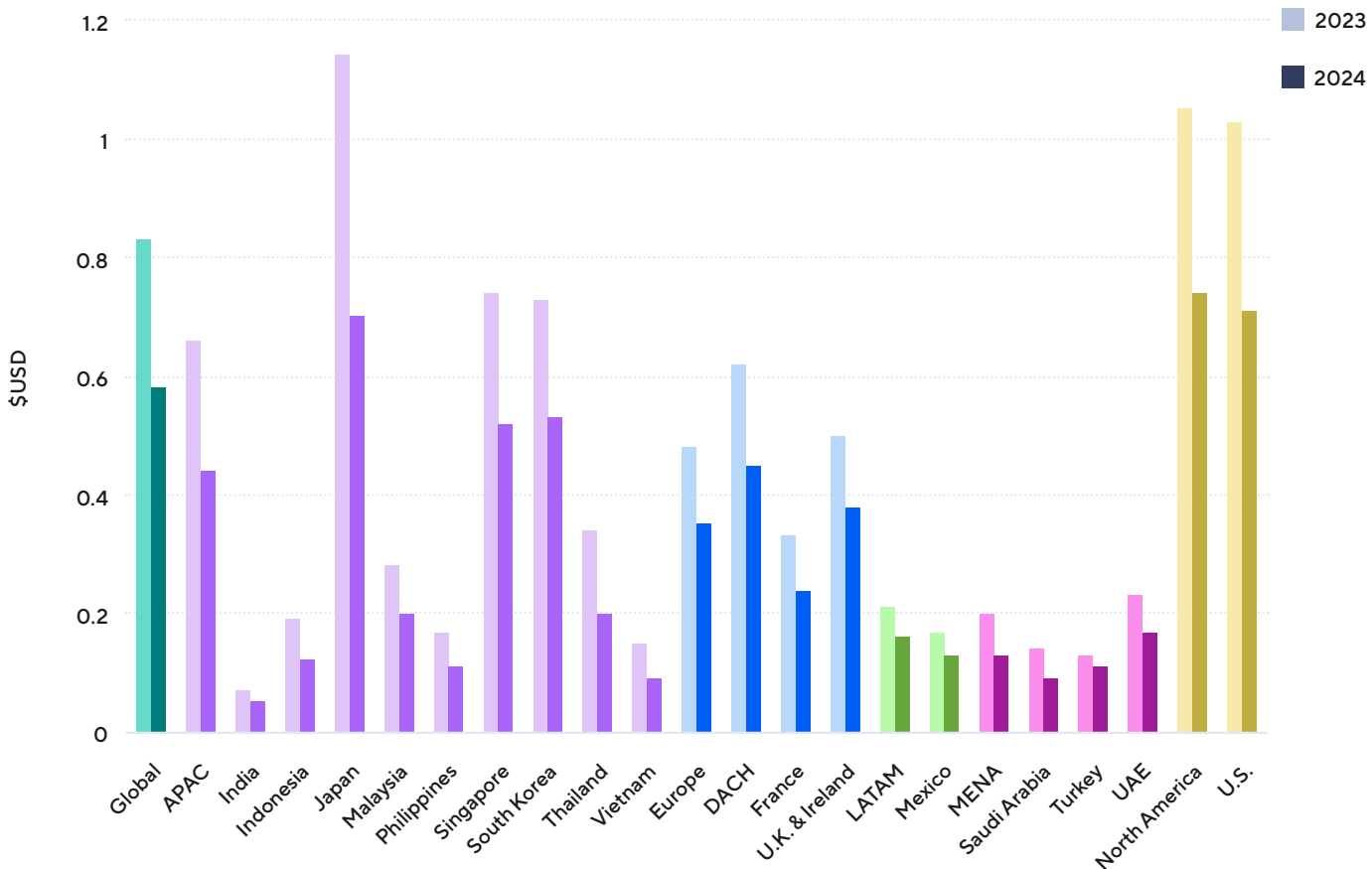
Along with the global trend, almost all regions and markets saw an ARPMAU decline in 2024. APAC overall dropped from \$0.54 to \$0.43, with India maintaining its relatively low position at \$0.07, and Japan decreasing from \$1.03 to \$0.82. North America dropped from \$1.21 to \$1.06. MENA saw an increase from \$0.15 to \$0.19, with Saudi Arabia up from \$0.18 to \$0.19.

Gaming ARPMAU IA 2023 - 2024 (Global)



In 2024, the global average IAP per monthly active user (ARPMAU IA) declined from \$0.83 to \$0.58. Board games saw the largest decrease, dropping from \$0.74 to \$0.3. On the growth side, action games climbed from \$1.10 to \$1.46, RPG increased from \$5.36 to \$6.48, and strategy games jumped from \$2.60 to \$5.34.

Gaming app ARPMAU IA by region and country 2023 - 2024



Most regions and markets saw drop offs in ARPMAU IA in 2024, including APAC (down from \$0.66 to \$0.44) and Japan (\$1.14 to \$0.70). North America, Europe, LATAM, and MENA declined, with Saudi Arabia and Mexico charting the smallest decreases.

CONCLUSION

The next move: Playing to win in 2025

The mobile gaming industry is evolving, with new rules and tactics needed to secure wins. The studios that thrive in 2025 will be those that embrace AI, refine their monetization strategies, and build deeper connections with players.

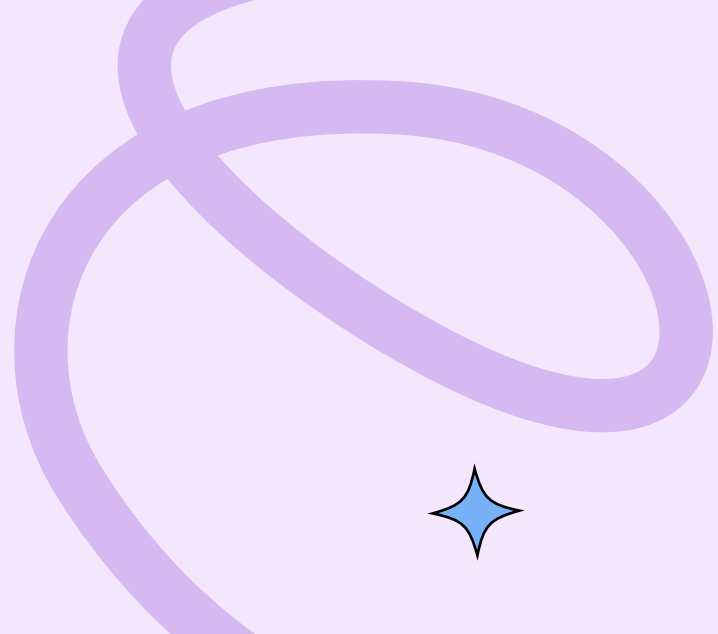
To drive sustainable growth, mobile marketers must work with consented, granular, first-party data where available, while leaning on next-generation tools and solutions to gain insight from aggregated data. For both UA and retention, creative experimentation, AI-driven optimization, and user-level precision are now essential. Whether capturing player attention with highly personalized ads and onboarding flows, or identifying critical moments in-game to secure LTV, marketers and developers need to engage and monetize users by effortlessly funneling them into the right pathways.

Make it your team's goal to build a holistic approach that combines personalization, community-building, and adaptive content. From dynamic difficulty adjustments to hybrid monetization, tailored in-game offers, and live events, there

are many innovative ways to boost retention *and* conversion rates. Social features like in-game communities, multiplayer modes, and cross-platform play are also proving essential to extending player lifecycles. The key is seamless, value-driven experiences that enhance—not disrupt—gameplay.

Fast-growing regions like LATAM and MENA present new opportunities for a competitive edge, but success will depend on localized, player-first strategies. The approach in these markets must be tailored to cultural preferences, engagement trends, and platform-specific behaviors.

The next phase of mobile gaming belongs to those who innovate, iterate, and think long-term. The industry is at a turning point, and the teams that leverage AI to make bold, metrics-driven moves today will be well-positioned not only to grow at scale, but to shape the future of the mobile gaming landscape.



Curious about the AI tools and technologies that can deliver real results for your game? [Request a demo today](#) to see Adjust's attribution and next-generation measurement solutions in action—and hear how we can fuel your growth.



Request a demo



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