

Playing to Win: 2025 Digital Game Advertising Report

Discover the latest trends in digital game advertising.



Sensor Tower | Our Customers

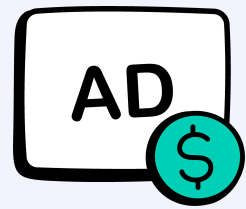
Top publishers trust Sensor Tower insights to grow their business

L'ORÉAL		Google			Disney
petco	HERSHEY	amazon	ROVIO	DOORDASH	depop
Walmart		Microsoft	SEGA	dyson	SONY
		Meta	OUTFIT7	Gett.	ByteDance
Alibaba	POPeYeS	Tencent 腾讯		P&G	NBA
		Johnson & Johnson		Welch's	Revolut

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

Executive Summary

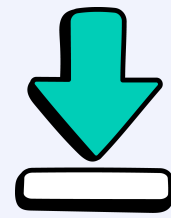
Q1 - Q3 2025



\$8.7B

Estimated gaming digital ad spend tracked across 14 markets

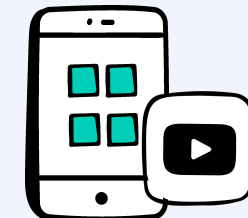
Game publishers continue to spend big on ads, adapting to acquiring players in a high cost environment by focusing on quality over scale.



41B

Downloads across mobile, Steam, PlayStation, Xbox

While downloads continue to fall on mobile post-ATT, Steam downloads look strong year over year with indies showing strong performance in Q2.



Mobile Apps & YouTube

Saw the most ad spend for mobile gaming and PC/Console respectively

Mobile app ad networks optimized for performance dominate on mobile, while YouTube is the default home of the PC/Console audience.



Royal Kingdom

#1 game by ad spend

Royal Kingdom has scaled to be the 18th biggest game in the world by in-app purchase revenue in less than a year.

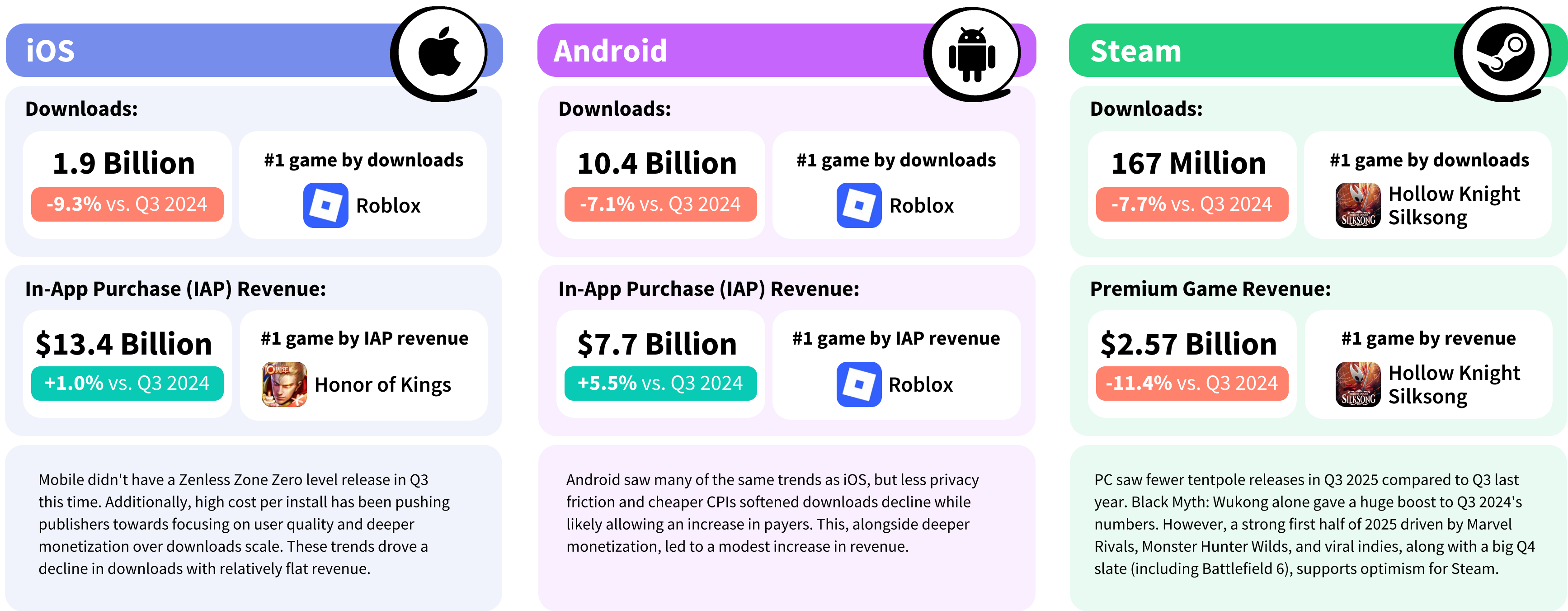
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Game Market Trends

Gaming Platforms at a Glance: Healthy, Behind Some Negative Trends

Q3 2025 Gaming Platform Review



Source: Sensor Tower Mobile App Insights, Video Game Insights.
Notse: iOS and Google Play combined. iOS only for China. IAP revenue is gross — inclusive of any percent taken by the app stores. Steam downloads include free-to-pay as well as premium, subscription game downloads, giveaways, and other downloads. Premium game revenue does not include in-game purchases.

Mobile Shooters Resurge in Asia and North America

Shooters are surging. Tencent’s Delta Force tripled in-app purchase revenue in Q3 vs Q2, with 90% of revenue from China. Free Fire (x NARUTO SHIPPUDEN) grew 22% quarter-over-quarter, having already overtaken Call of Duty: Mobile in US shooter revenue in Q2. Two cross-platform mobiles joined the fight: Valorant Mobile launched in China and is now the #4 shooter by China revenue this quarter, while Destiny: Rising ranked #11 worldwide, with 70% of its revenue from the US.

The momentum is mirrored in PC/Console with the launches of Battlefield 6, Borderlands 4, and Delta Force on console: proof that the biggest publishers are betting heavily on shooters this year.

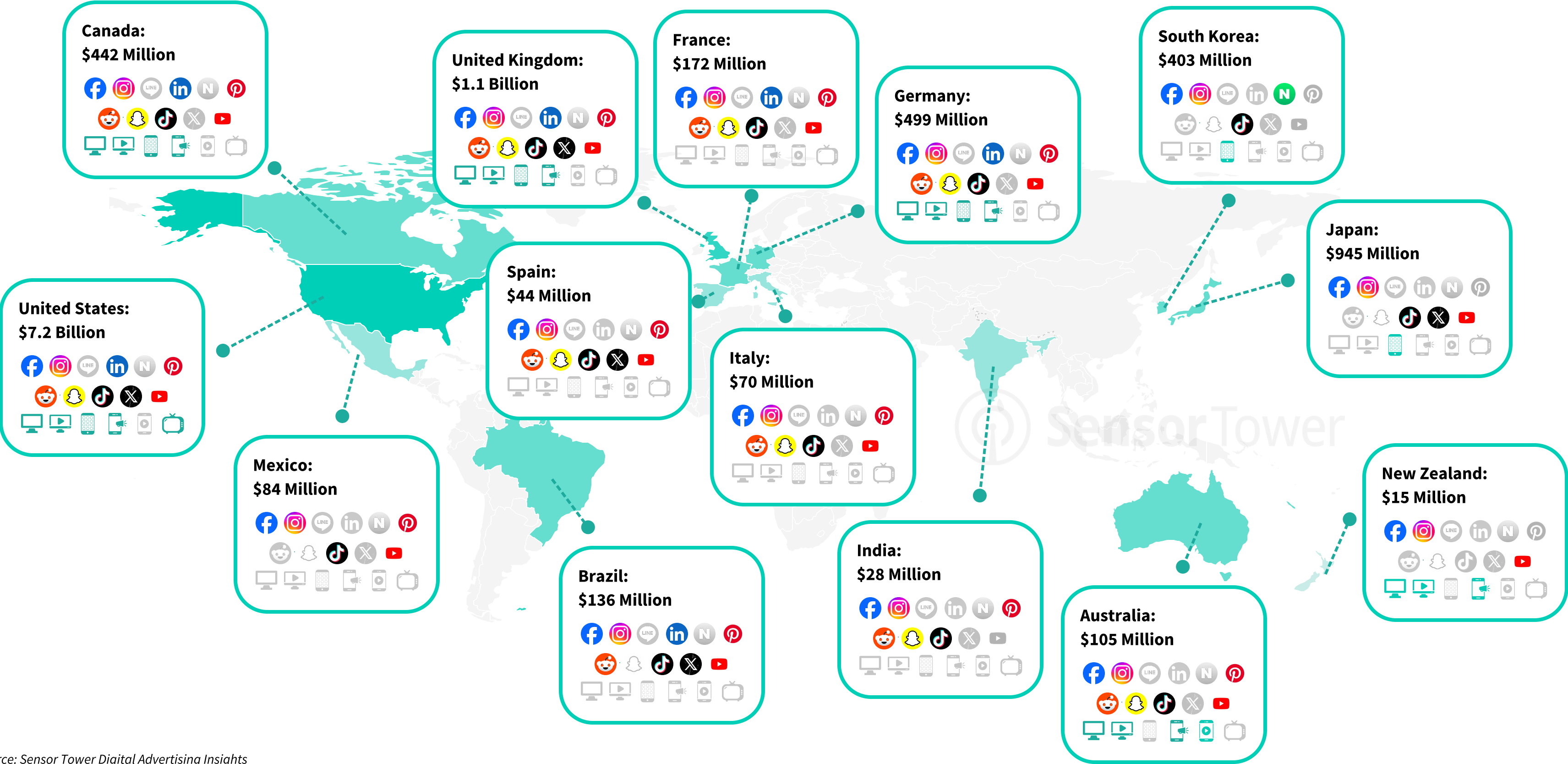
Downloads are down across major regions as publishers continue to adapt to higher cost per installs by focusing on quality of downloads over volume.

Mobile Game Trends Q3 2025 over Q2 2025
by Genre and Region

	In-App Purchase Revenue		Downloads		
	North America	Asia	Europe	Latin America	Rest of World
Action	-18.3%	-7.4%	-15.5%	-13.4%	-14.1%
Arcade	-3.4%	4.5%	11.0%	-2.2%	4.1%
Casino	-3.2%	-2.8%	6.0%	-1.2%	-0.4%
Geolocation	13.8%	3.2%	25.4%	25.5%	12.7%
Lifestyle	-2.7%	-4.1%	2.5%	6.5%	-2.8%
Puzzle	5.6%	8.8%	9.8%	7.9%	7.5%
Racing	-1.5%	-1.4%	9.9%	2.5%	4.4%
RPG	6.2%	-1.7%	3.9%	0.7%	2.7%
Shooter	19.3%	33.5%	2.2%	3.2%	10.5%
Simulation	1.3%	6.7%	12.9%	5.8%	13.1%
Sports	-1.3%	-3.5%	15.2%	6.5%	10.8%
Strategy	9.0%	-2.6%	10.8%	8.3%	12.0%
Tabletop	0.4%	13.6%	7.1%	7.2%	3.2%

Source: Sensor Tower Mobile App Insights

Global Overview | Total Gaming Publisher Ad Spend Last Twelve Months



Source: Sensor Tower Digital Advertising Insights
Note: Included ad channels vary by market. Ad spend estimates for October 1, 2024 through September 30, 2025.

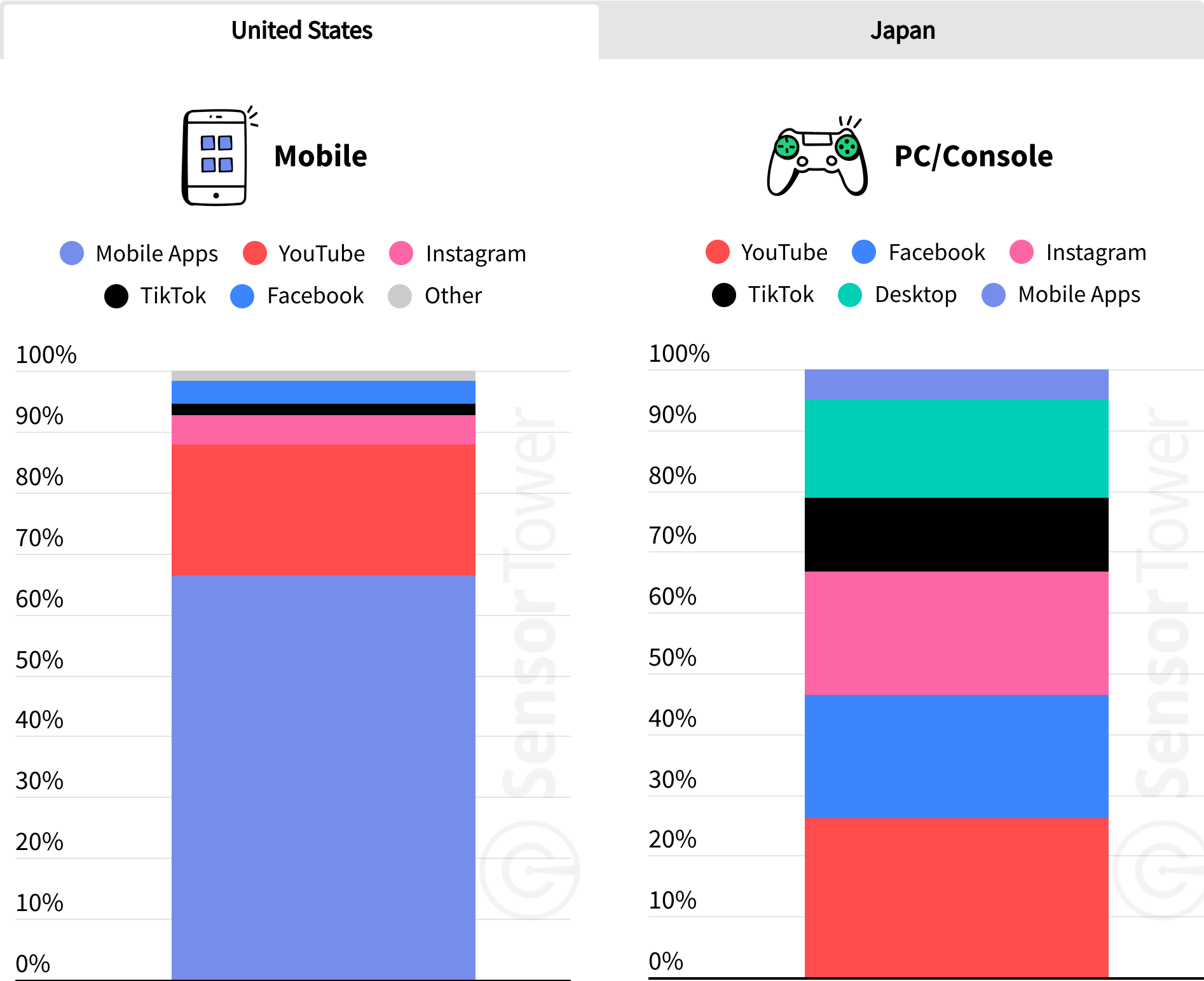
Mobile App Networks Lead Mobile Spend, YouTube Tops PC/Console

Mobile app networks like AppLovin and AdMob remain the baseline choices for many mobile games across the West and East. Massive in-app gaming inventory alongside privacy resilient optimization allows publishers to reliably find payers.

YouTube remains the top choice for PC/Console publishers as the de facto home of PC/Console players. Outside of YouTube, US marketers lean into social networks for broader reach, creator-led social proof, and effective lookalike targeting. YouTube's share is even higher in Japan than the US, where long-form creator content and a stronger culture of treating trailer drops as exciting events concentrates more spend on the platform.

Source: Sensor Tower Pathmatics Digital Advertising Insights

Gaming Digital Advertising Spend Share by Network and Platform in Q3 2025



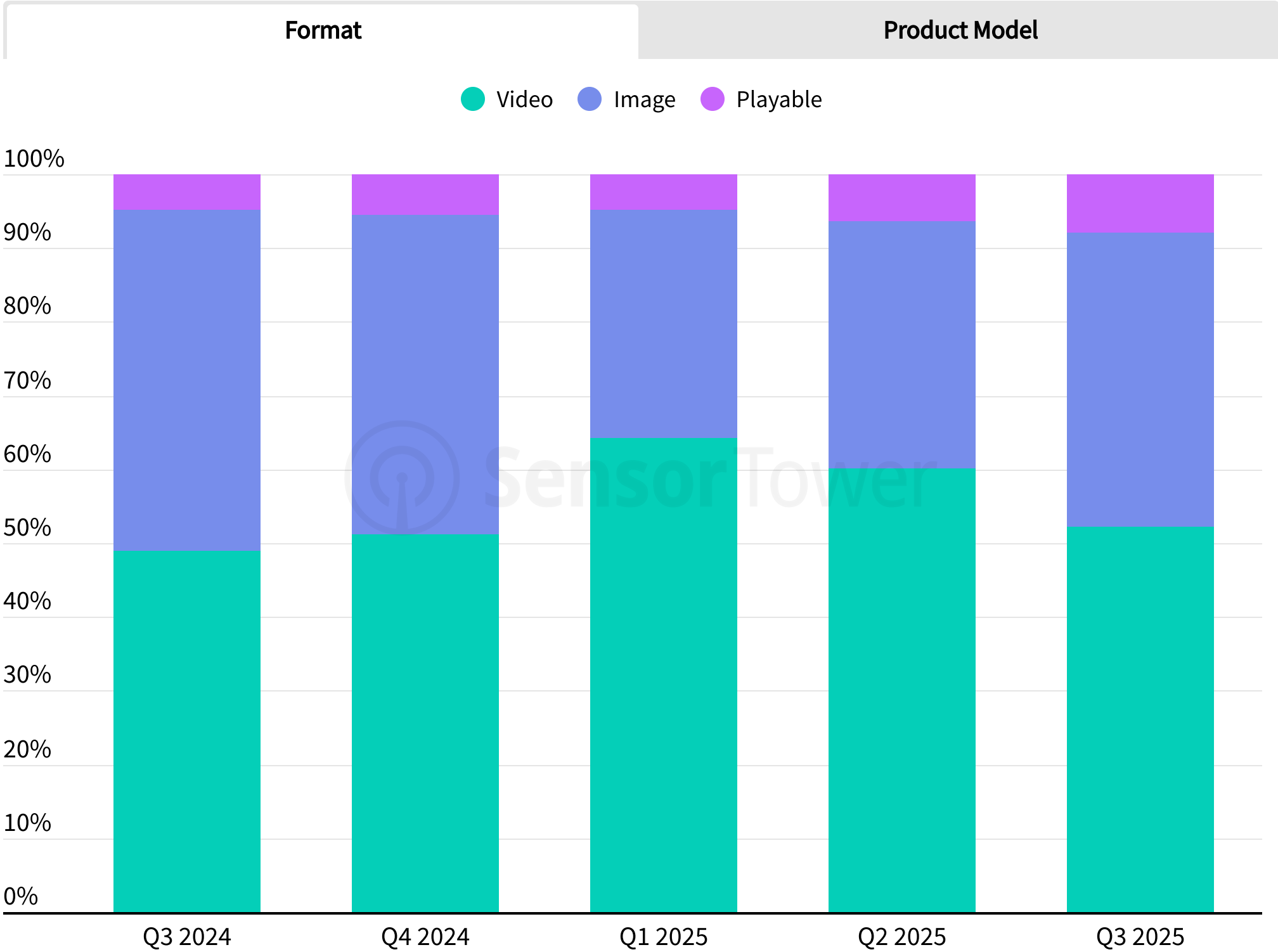
Images Retake Impression Share From Video

Videos took significant impression share from images at the start of 2025, but images have been clawing back in Q2 and Q3. This trend is particularly pronounced on AdMob, which saw a sharp spike in image impression share in Q3 2025. Publishers are leaning into cheap to produce and iterate statics as fatigue and Q2 - Q3 pricing sets in. Winning concepts from static testing can then be pushed more confidently to higher cost per mille video and playables.

Playables have shown steady impression growth in the past quarters, in particular on AppLovin, but in Mintegral, Unity, and AdMob as well. Publishers are continuing to adopt playables, which pre-qualify players for post click quality, more often hitting early retention and return on ad spend (ROAS) targets.

Source: Sensor Tower Mobile App Insights

Mobile Gaming Impression Share
Worldwide



Games Unlock Elusive Audiences

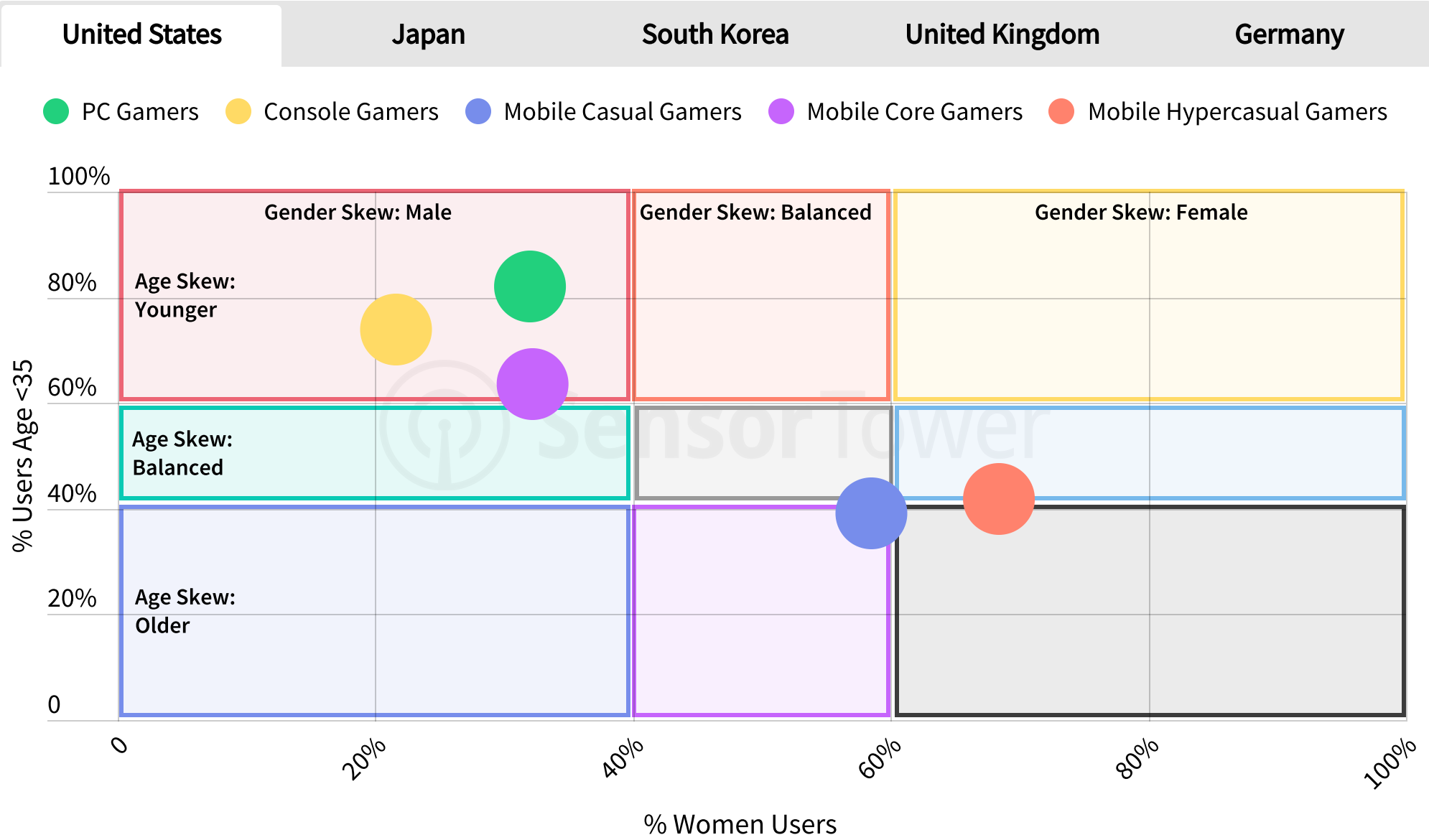
Who they are: PC/console/mobile core gamers skew young and male, with PC consistently posting the largest under-35 share across markets. Casual and hyper-casual mobile audiences skew more female and are age-balanced.

How they behave: PC/console players over-index on social media activity, food delivery, and fast food apps. Casual players, in contrast, over-index on real money gambling, making them a distinct performance segment. Deeply understanding segments is crucial both for game publishers and for brands looking to target these audiences.

Why it matters: Games unlock hard-to-reach cohorts and enable high-fit brand collabs delivering both attention and measurable lift.

Source: Sensor Tower Audience Insights
Note: Gender represented as Men and Women only and is not representative of all gender identities.

Demographics for Top Games by In-App Purchase by Geo, Q4 2024 - Q3 2025



Top Non-Gaming Personas for Each Audience

	PC Gamers	Console Gamers	Mobile Casual Gamers	Mobile Core Gamers	Mobile Hypercasual Gamers
1	Digital Socialites	Digital Socialites	Gamblers	Parents	Latte Lovers
2	Delivery Diners	Peer-to-Peer Payers	Shopaholics	Digital Socialites	Parents
3	Fast Foodies	Fast Foodies	Telehealth Patients	Manga & Anime Lovers	Mental Health Enthusiasts

Midcore Games Find Success Featuring IP Collabs in Creative and Store Assets

Borrowed brand equity cuts through fatigue and converts faster. Fans will stop scrolling and pay to own a piece of their favorite franchise, and they'll pay before the event ends. Collabs expand the total addressable market, causing players who have never tried a genre to give it a shot. Collabs also provide a new element to iterate on for creative teams and signal high production value and the tone of the game. Some games, like Free Fire and Raid: Shadow Legends, use an icon branded by their collab partner during the collab and even months after the initial collab has ended. The ever present risk of these events is losing players who join for their favorite franchise then leave as soon as the event is over, creating a short-term spike instead of long-term lift. Ensuring a match between audiences and between the IP's tone and the game's mechanics, then ensuring adjacent evergreen content is appealing to the newly acquired audience is key to minimizing post event churn.



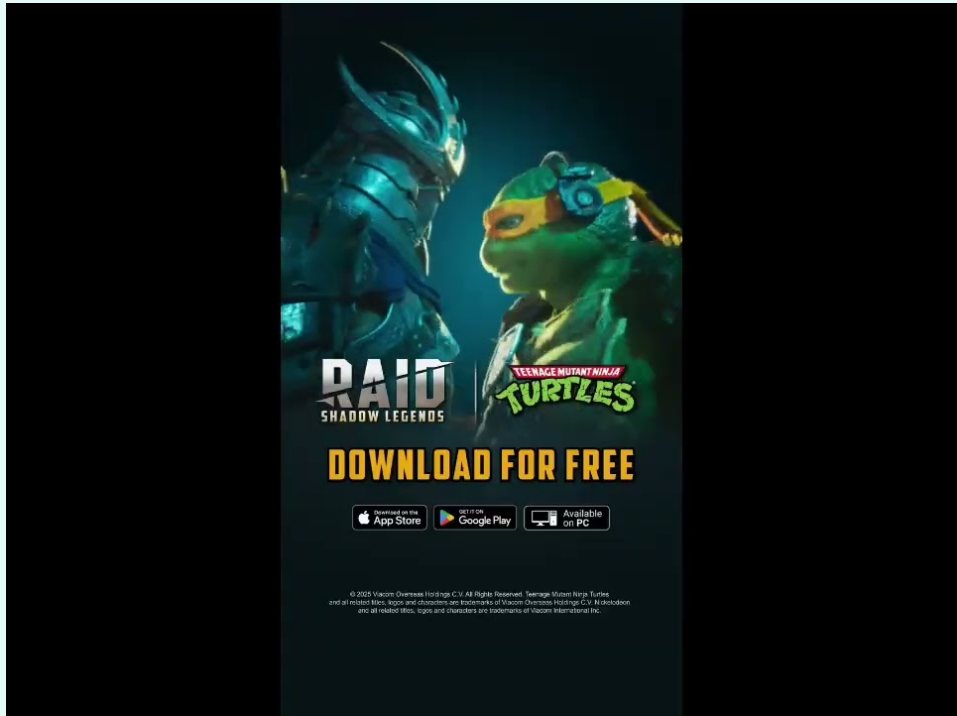
Free Fire - #1 Ad Creative
Worldwide Q3 2025



PUBG - #1 Ad Creative
Worldwide Q3 2025



Raid: Shadow Legends - #1 Ad Creative
Worldwide Q3 2025



Source: Sensor Tower Mobile App Insights
Note: Example top digital ad creatives.

New Gameplay Ad Creative Patterns Continue to Emerge

Simple, instantly legible gameplay with a clear payoff/progression hooks fast and scales: one tap, visible result, next upgrade. It sells agency (“I can do that”) while keeping cognitive load low, and it travels across every format, from static, short/long video, to playables. They frequently localize with little to no text, and feed SKAN/Privacy Sandbox crucial early signals.

New gameplay patterns that fit this bill now emerge, iterate, and fatigue at high speed. You can see one such loop in the Dark War Survival creative below, a concept already echoed across other games’ ads (sometimes beyond what the gameplay delivers) and in Unravel Master, which rides the revived Physics sub-genre wave. The Kingshot creative showcases a unique opening hook alongside its signature tower defense gameplay creative.



Dark War Survival - #1 Ad Creative
by US Instagram Share of Voice in 3Q25

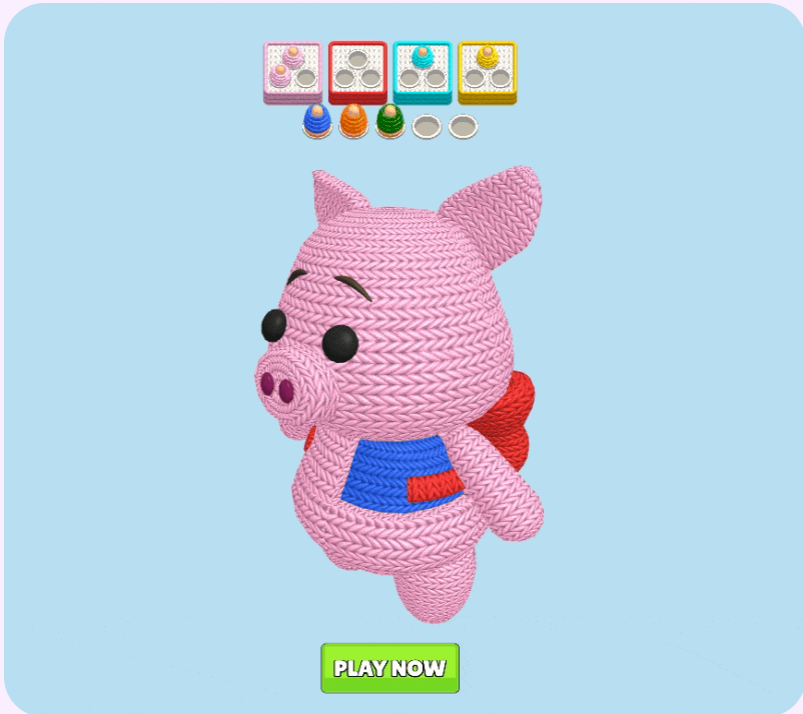






Unravel Master - #1 Ad Creative
by US Instagram Share of Voice in 3Q25







Kingshot - #10 Ad Creative
by US Instagram Share of Voice in 3Q25





Source: Sensor Tower Mobile App Insights
Note: Example top digital ad creatives.

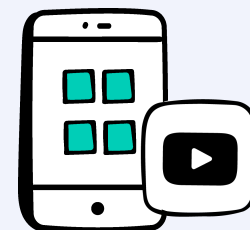
Market Trends

Key Takeaways



Shooters are resurging.

Free Fire and other mobile shooters have been showing huge growth this year, as Tencent scaled Delta Force to be the 3rd biggest shooter in the world by revenue. Tencent also launched Delta Force on console and Valorant on mobile in China. EA went all-in on Battlefield 6: and cashed in big-time. PlayStation brings another cross-platform contender in Destiny: Rising, now the 11th biggest shooter in the world.



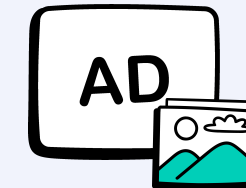
Mobile app networks and YouTube remain the key networks for mobile and PC/Console, respectively.

Networks like AppLovin and AdMob allow publishers to optimize to modeled LTV rather than broad reach, marking a post-ATT tilt towards quality over quantity. YouTube remains the primary home of the PC/Console audience worldwide.



Games and intellectual properties unlock new opportunities and elusive audiences.

Game audiences are both high-value and hard to reach. Games give brands a direct line to large, engaged communities, while IP and brand collabs let games tap new segments beyond their core. In both cases, fit and execution determine whether the partnership drives real lift instead of a short-term spike.



Fresh, instantly legible gameplay with progression fuels top performing ad creatives.

Gameplay ads have always been core; what's changed is the velocity. Concepts now appear, iterate, and burn out in weeks, not months. If you're not testing for tomorrow, you're buying yesterday's creative at today's prices.

Competitive Landscape

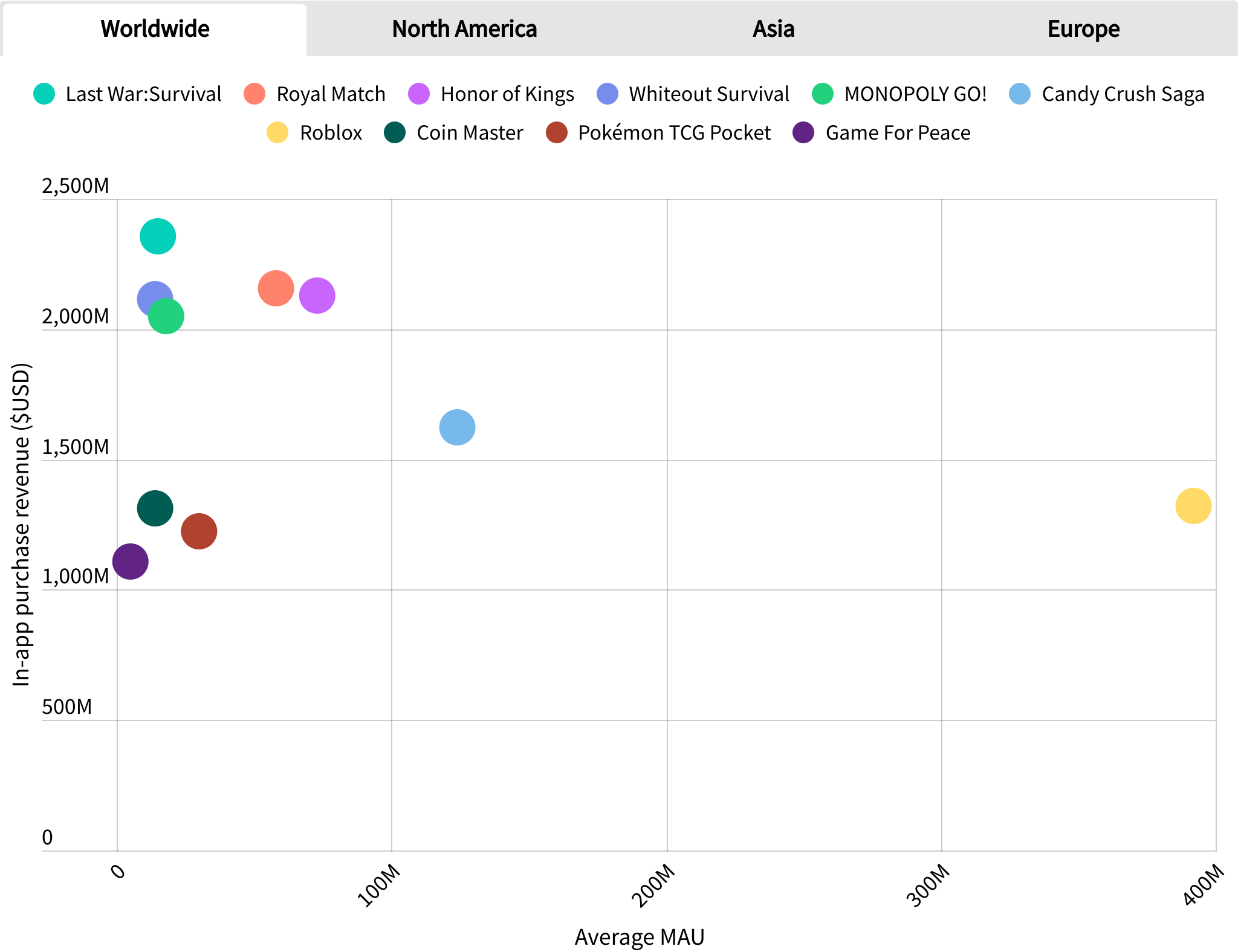
Last War: Survival Tops Revenue; Roblox Leads by Player Base.

Last War: Survival and Whiteout Survival herald the wave of worldwide 4X Strategy growth over the past two years. MONOPOLY GO! is winning out worldwide and especially in North America among casual games, but is topped by Coin Master, Royal Match, and Candy Crush Saga in Europe.

Roblox is an outlier in number of users, signifying its unique role as a game platform in an app. Its largest markets are the US and Europe, though its #2 geo by ad impressions in Q3 was South Korea, signaling on-going efforts to penetrate Asian markets.

Source: Sensor Tower Mobile App Insights

Top Mobile Games by In-App Purchase Revenue Q4 2024 - Q3 2025



EA SPORTS FC 25, Marvel Rivals Top Charts in Great Year for Indies

EA SPORTS FC 25 is the best-selling premium PC/Console game of the year, while Marvel Rivals is the most downloaded PC/Console game, free-to-play or otherwise.

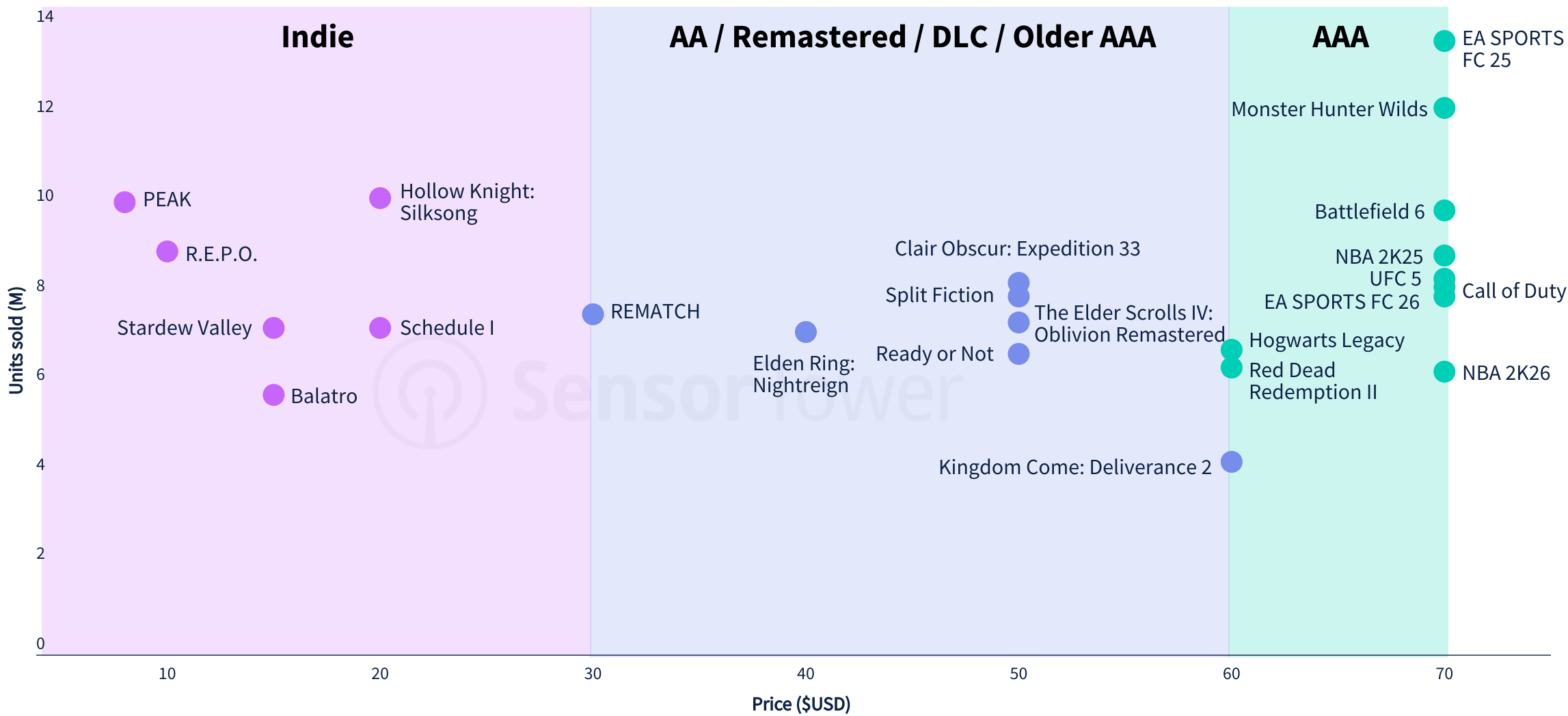
Battlefield 6 released earlier this month and is already the third best-selling AAA game of the year.

For free-to-play, shooters dominated the year. NetEase and Marvel entered the hero shooter category with Marvel Rivals, the most downloaded PC/Console game of the year and Tencent entered military shooters with Delta Force.

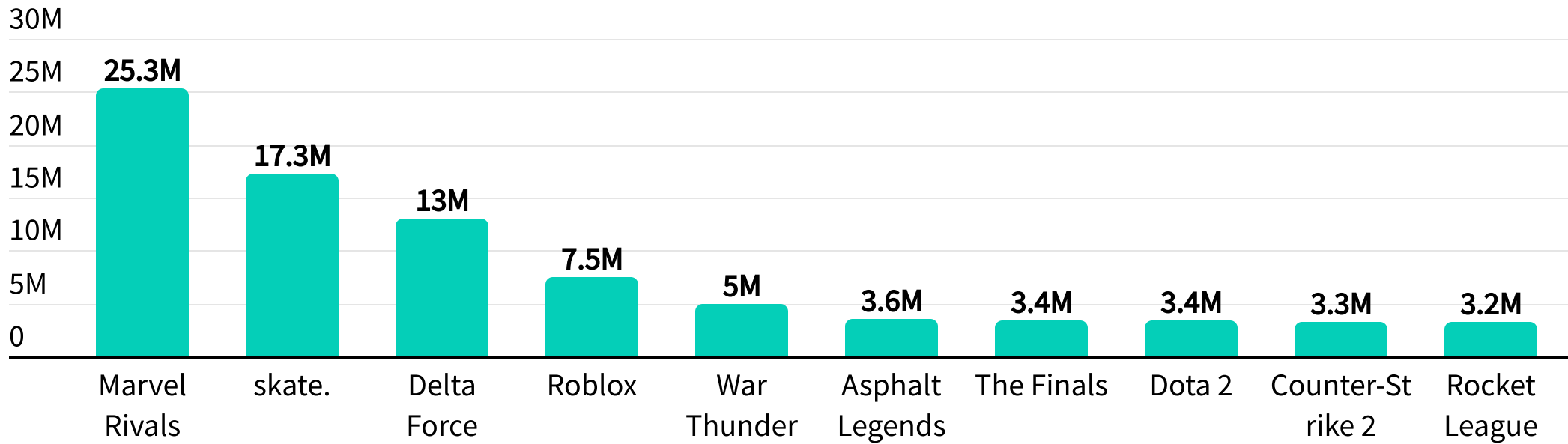
It's been a great year for Indie/AA games as well. From critically acclaimed hits like Clair Obscur: Expedition 33 and Split Fiction to content creator fueled virality rockets like PEAK and R.E.P.O., several games outside of AAA have become cultural sensations.

Source: Sensor Tower Video Game Insights
Note: 2025 YTD up to October 22, 2025. Units sold include game subscription downloads, giveaways, and other downloads.

Top PC/Console Games by Units Sold 2025 YTD and Price



Top Free PC/Console Games by Downloads 2025 YTD



Royal Kingdom, Fortnite Top US Gaming Ad Spend Among Games

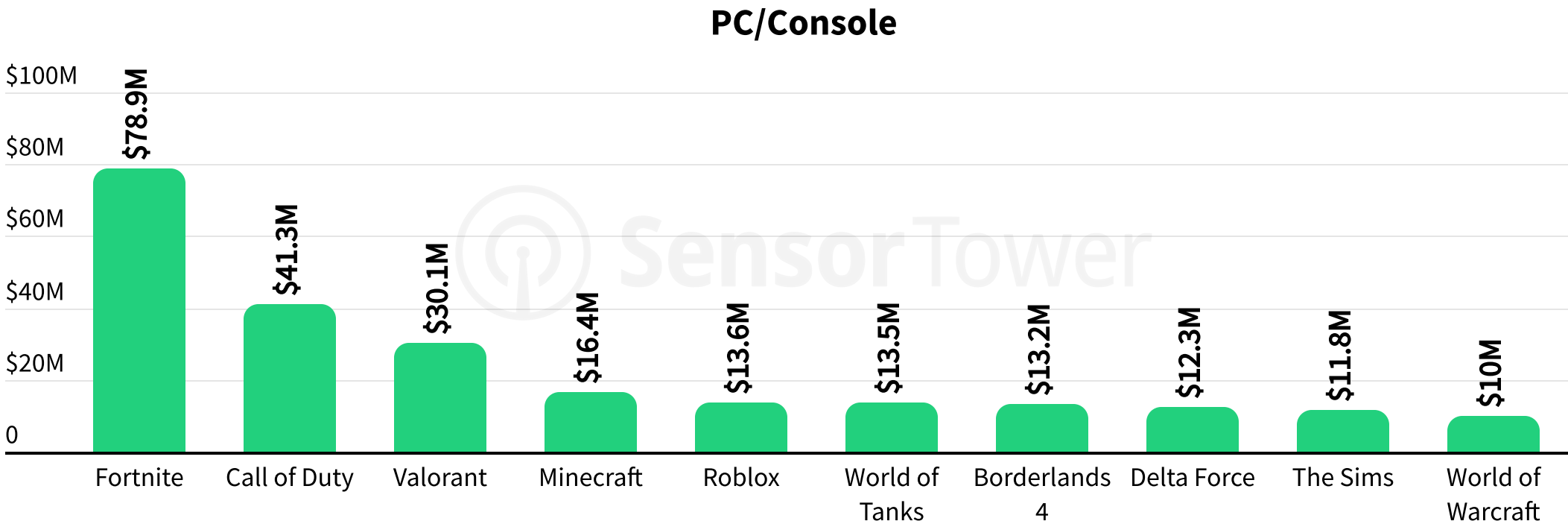
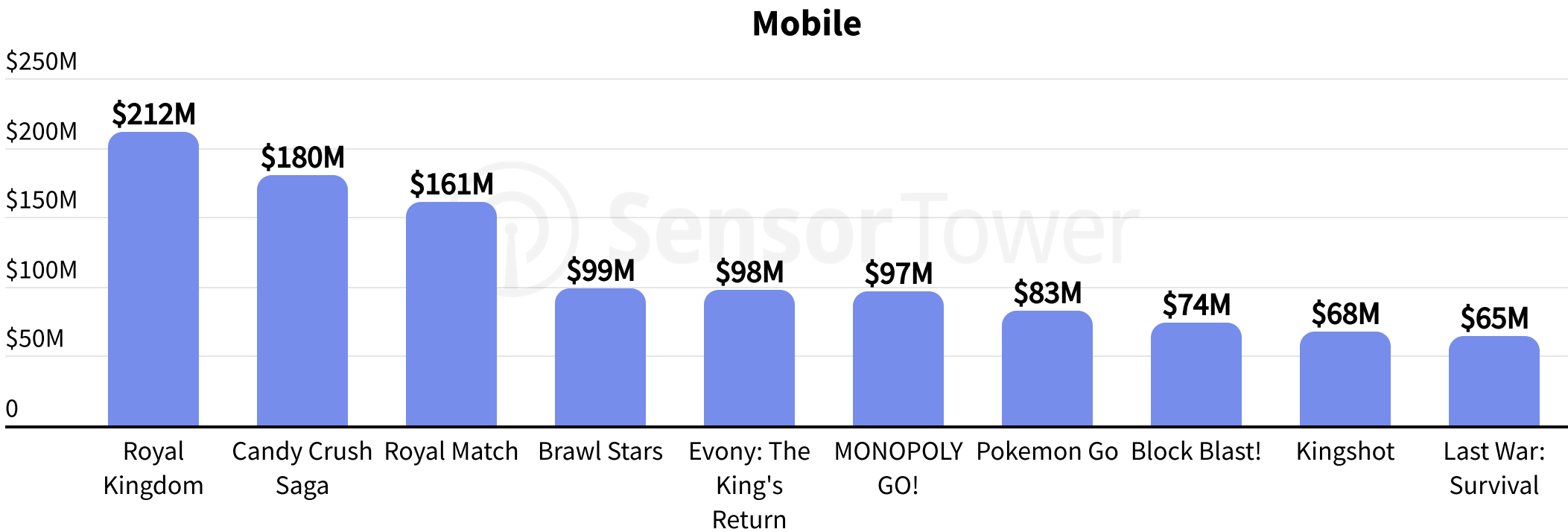
Dream Games spent huge this past year, both on the recently launched Royal Kingdom and the already gigantic Royal Match. Royal Kingdom has climbed from the #446 top mobile game by in-app purchase revenue in Oct '24 to #18 in Sep '25.

The #2 mobile game by US ad spend was the evergreen Candy Crush Saga. #4 was Brawl Stars, though most of that spend was in 2024. In 2025, Supercell's resources have been diverted to Clash Royale.

On the PC/Console side, Fortnite continues to lead in spend, with its top creative by spend heralding the return of Fortnite OG. Call of Duty was the top spender among premium games, with most of the shown spend coming from last year's Black Ops 6. This chart does not include Battlefield 6, whose launch occurred shortly into Q4.

Source: Sensor Tower Pathmatics Digital Advertising Insights

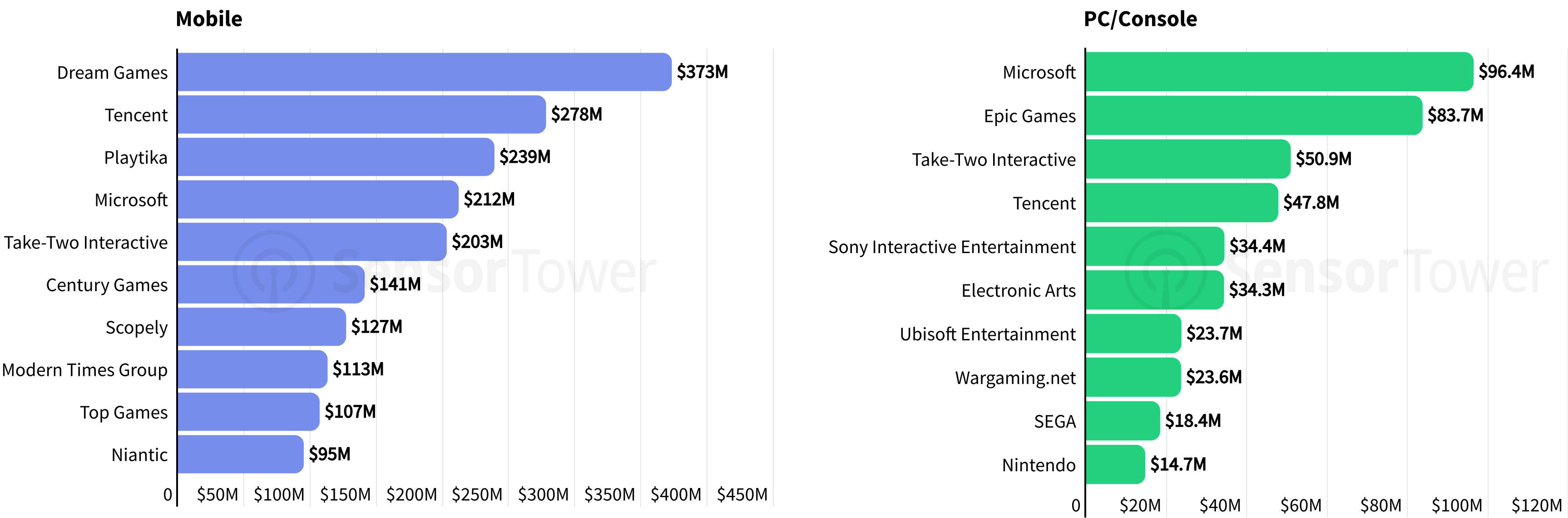
US Digital Ad Spend in Gaming
Q4 2024 - Q3 2025



Dream Games, Microsoft are Top Publishers by US Ad Spend

Dream Games outspent Tencent's entire portfolio in the US focusing on Royal Match and Royal Kingdom. Microsoft's spend across Call of Duty, Minecraft, and World of Warcraft topped Epic Games' spend on Fortnite. Microsoft spent twice on mobile than they did on PC/Console. In contrast, the market spent nearly 10x on mobile gaming vs PC/Console gaming in the US.

US Digital Ad Spend in Gaming, Q4 2024 - Q3 2025



Source: Sensor Tower Pathmatics Digital Advertising Insights

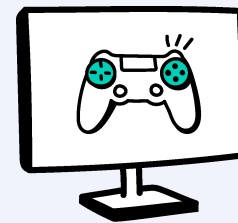
Competitive Landscape

Key Takeaways



Strategy games have taken top spots.

Last War: Survival is the biggest mobile game in the world by in-app purchase revenue for the past twelve months, with fellow new(ish) 4X strategy game Whiteout Survival not far behind at #4. Kingshot is the biggest mobile game grower by in-app purchase revenue in 3Q2025, seeing worldwide success. Roblox deserves special mention for having a massive player base, as a unique game platform within platforms.



Shooters resurge on PC/Console.

Marvel Rivals is the most downloaded game of the year and is now the 10th largest game by average PC/Console monthly active users 2025 year to date. Battlefield 6 is the third best-selling game of the year mere weeks after launch. Delta Force was the 4th most downloaded PC/Console game of the year, just behind EA SPORTS FC 25.



Casual games are the biggest spenders in the US.

Dream Games has been flooding channels to push Royal Kingdom while defending Royal Match share. Candy Crush Saga, MONOPOLY GO!, and Pokemon Go are also huge investors into the largest games market.

It's not just casual, however: midcore games like Brawl Stars, Evony, Kingshot, and Whiteout Survival are also finding major success scaling and taking share in the US.



Content creators catapult indie games to culture sensations.

It's the same playbook as Lethal Company: creators latch onto co-op games with huge reaction moments, viewers recruit friends, and the sub-\$20 price removes friction, catapulting Indies like PEAK and R.E.P.O. into the stratosphere.

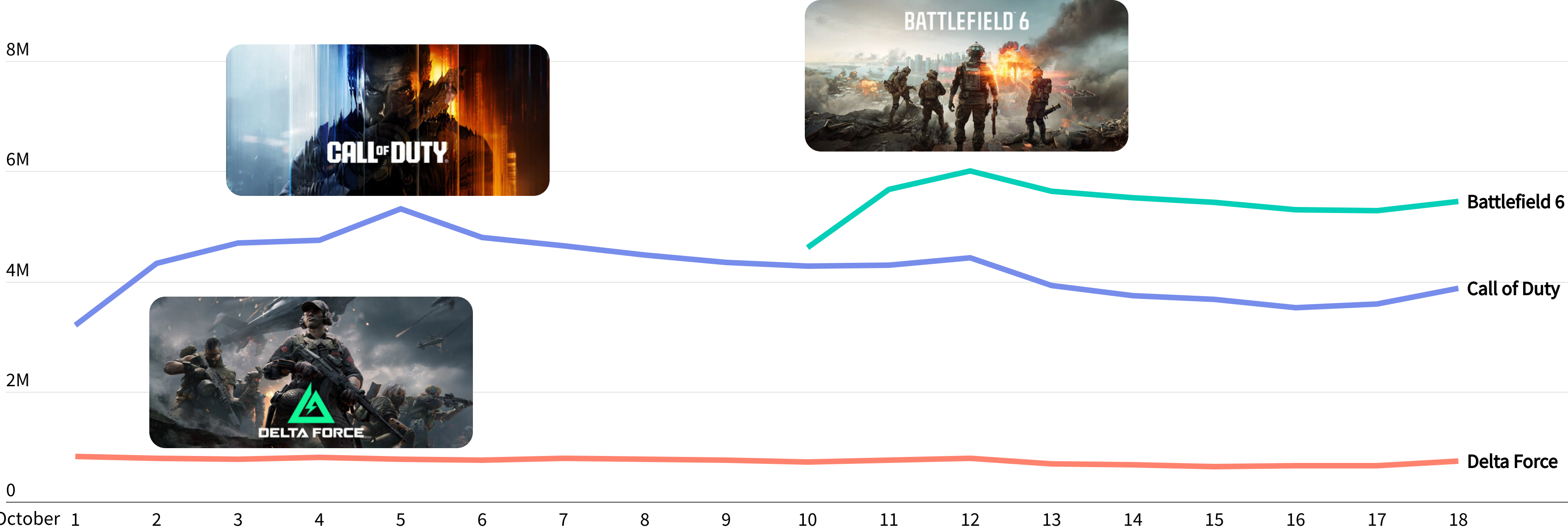
Ultra polished single player experiences like Clair Obscur: Expedition 33 and Hollow Knight: Silksong also saw huge wins.

Case Studies

Battlefield 6 Daily Active Users Hold Strong vs Call of Duty Post-Launch

Call of Duty's daily active user count is down 11% since Battlefield 6 released. Delta Force is down 4%. For the first time in years, we have a new leader in the military shooter space.

Top Military Shooters PC/Console Daily Active Users
Worldwide, Steam, PlayStation, Xbox

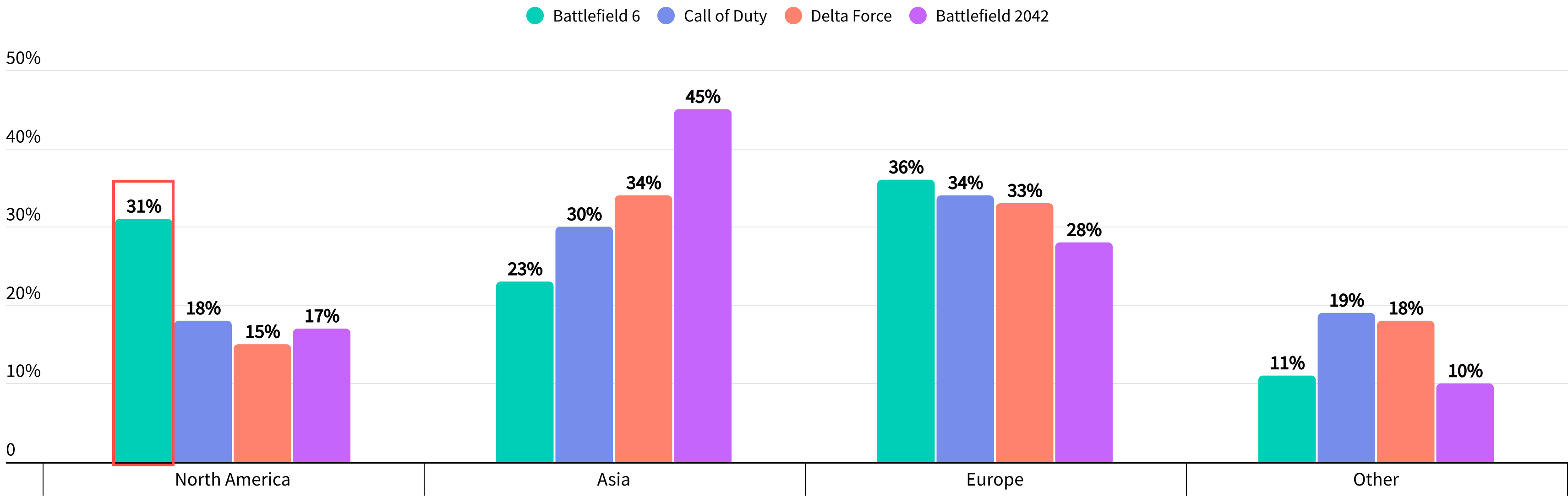


Source: Sensor Tower Video Game Insights

Battlefield 6 Breaks into US in Unprecedented Way

27% of Battlefield 6's Steam players are in the U.S., a larger percentage than any of its current competitors or its predecessor, Battlefield 2042. Battlefield's #1 country by Steam downloads is the U.S. For the other three shooter shown here, it's China. This is common on Steam, since the lack of console penetration in China has made PC and Steam the default PC/Console platform for the massive market. The fact that it's the US for Battlefield 6 is a testament to the degree that Battlefield 6 made inroads in the US market.

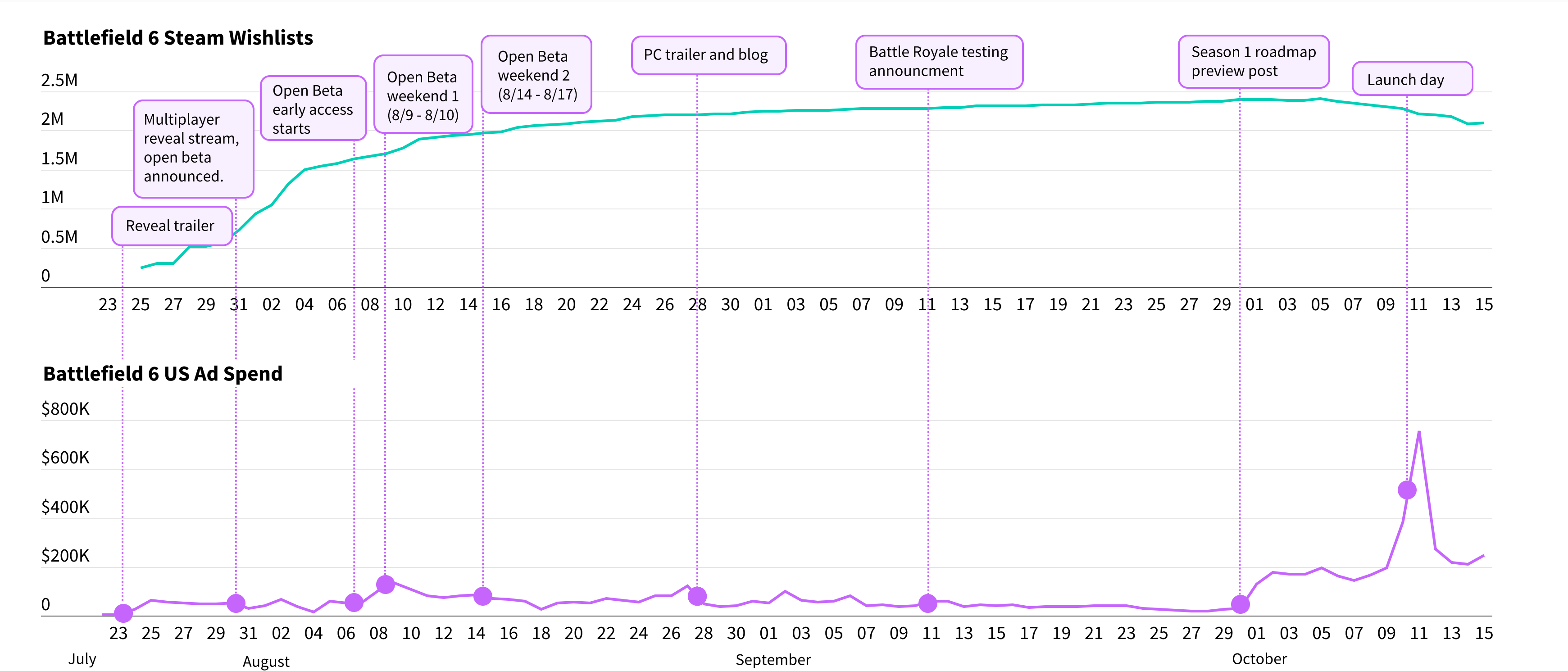
Top Military Shooters Steam Users by Region
Worldwide



Source: Sensor Tower Video Game Insights

Battlefield 6 Reveal Trailer and Open Beta Campaigns Key to Driving Demand

Battlefield 6 blew the doors off with a trailer showcasing massive environment destruction, then delivered with gameplay showcased in Open Beta weekends. Messaging was clear, signaling a return to gritty, grounded Battlefield gameplay. Cadence from start to finish was strong, driving demand high and hoarding player attention.



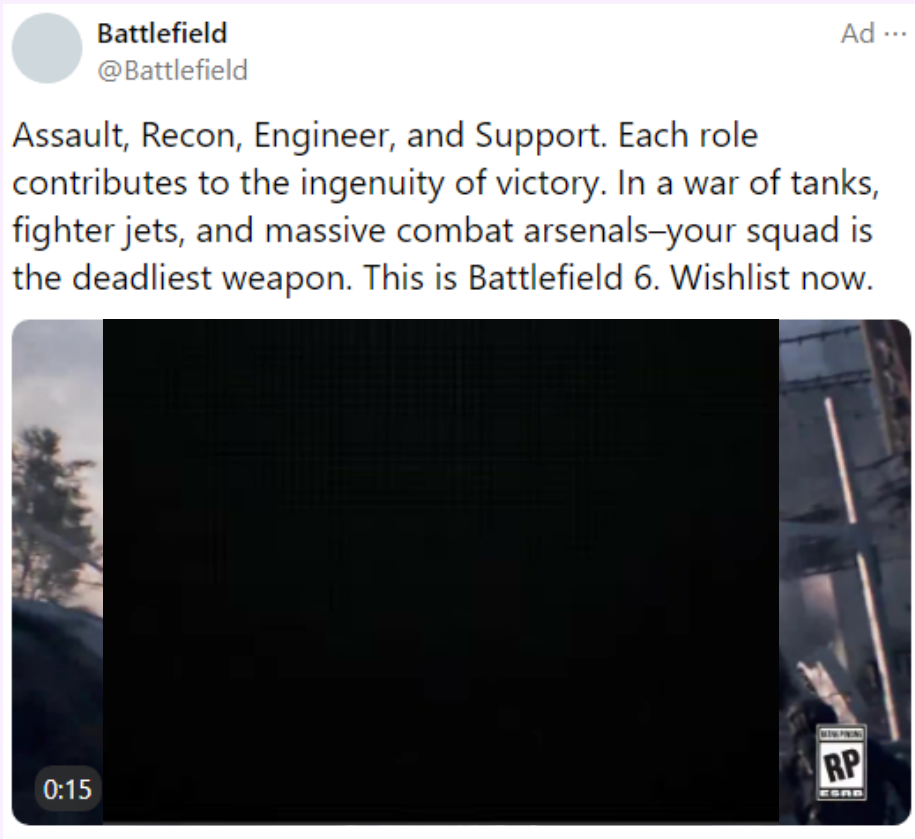
Source: Sensor Tower Video Game Insights, Pathmatics Digital Advertising Insights

Battlefield 6 Use Reveal Trailer for Ad Creative in Reveal Campaign, Gameplay Footage for Open Beta Campaign, Celebrities/VFX Heavy Live-Action for Launch Campaign

Reveal campaign showcased hero cuts on TikTok, X (Formerly Twitter), and Facebook.

Campaign goal:
Wishlists, awareness

#1 Battlefield Ad Creative by US Spend During This Time (channel: X (Formerly Twitter)).



Source: Sensor Tower Pathmatics Digital Advertising Insights

Open beta campaign focused on gameplay footage on Facebook, X (Formerly Twitter), and TikTok.

Campaign goals:
Open beta participation, pre-orders

#1 Battlefield Ad Creative by US Spend During This Time (channel: X (formerly Twitter)).



Source: Sensor Tower Pathmatics Digital Advertising Insights

Launch campaign used celebrities (who were immediately killed off) and heavy VFX live-action footage on OTT, Reddit, and Facebook.

Campaign goals:
Pre-orders then digital store conversion

#2 Battlefield Ad Creative by US Spend During This Time (channel: OTT).



Source: Sensor Tower Pathmatics Digital Advertising Insights

Royal Kingdom Dominating Apple Search Ads Share of Voice

Apple Search Ads are a cornerstone of the advertising strategy of the fastest scaling casual game today. 21% of the game's downloads in the US App Store come from paid search.

Royal Kingdom doesn't just defend branded keywords (ex. "royal kingdom" and "royal") in Apple Search Ads. The game also bids on broad, high-volume generics like "games," capturing outsized impression share at the point of intent. 93% of users who searched the US App Store for "games" and 91% of users who searched for "free games" saw a Royal Kingdom ad.

Royal Kingdom also goes after competitor keywords. The largest share of the top 25 casual games downloads come from organic search. Royal Kingdom goes after this traffic, sometimes entirely conquering a competitor's keywords by Apple Search Ads share of voice.

Source: Sensor Tower Mobile App Insights

21%

Royal Kingdom US App Store downloads come from Paid Search. The top 25 casual games by US in-app purchase revenue only take 3.4% of their US App Store downloads from Paid Search.

93%

Royal Kingdom share of voice among Apple Search Ad bidders for keyword "games" 3Q2025.



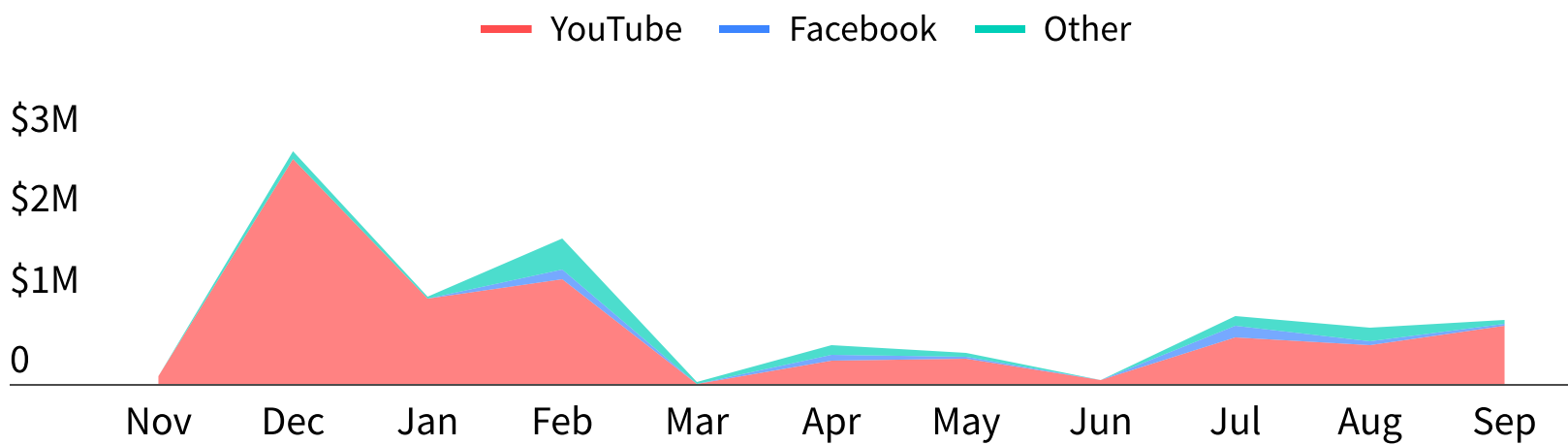
Selected Top US App Store App Search Ads Gaming Keywords' Top Bidders by Share of Voice

	games	no wifi games	free games	offline games	no ads games	royal kingdom	kingdom rush	castle crush
Traffic Score	8.0	7.2	6.8	7.1	5.4	7.0	6.0	4.2
1	Royal Kingdom (93%)	Royal Kingdom (73.87%)	Royal Kingdom (91%)	Royal Kingdom (43%)	Royal Kingdom (97%)	Royal Kingdom (99%)	Royal Kingdom (100%)	Royal Kingdom (97.8%)
2	Match Masters (1.7%)	Royal Match (12%)	Solitaire (2.2%)	Royal Match (24%)	Match Villains (1.0%)	Match Factory (0.66%)		Match Villains (1.7%)
3	Solitaire Smash: Real Cash (1.7%)	Harry Potter: Puzzles & Spells (8.7%)	Match Villains (1.9%)	3D Bolt Master (9.4%)	Coin Master (0.6%)	Match Villains (0.09%)		Matching Story (0.6%)
4	Royal Kingdom (0.9%)	Match Villains (1.9%)	Royal Match (1.5%)	Duolingo (5.0%)	Vita Mahjong (0.6%)			
5	Match Villains (0.8%)	Royal Match (1.6%)	FanDuel Casino: Real Money (1.4%)	Block Blast! (4.4%)	Lucky Duel (0.4%)			

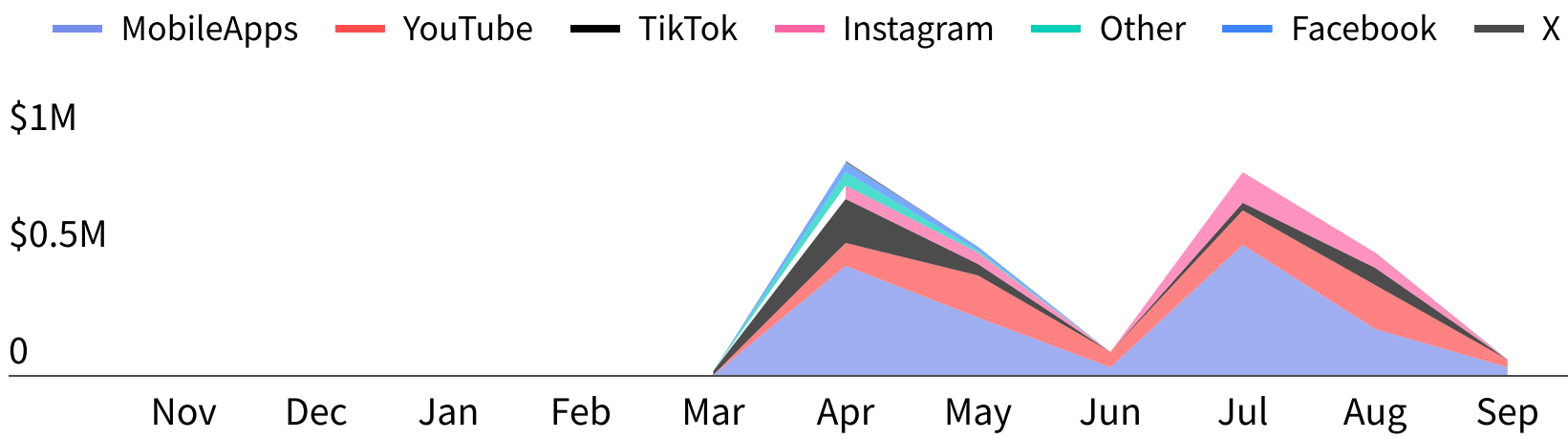
Note: Traffic score is a measure of how much traffic a keyword gets, with 10 being the highest score. "Instagram" is a keyword with traffic score of 10.

Delta Force Emphasizes Free to Play Seasons on YouTube for PC/Console; Content Creator Style UGC Gameplay on Mobile.

Delta Force PC/Console US Ad Spend by Network



Delta Force Mobile US Ad Spend by Network



#1 Delta Force by US PC/Console Creative Q3 2025 Spend

Delta Force PC/console ads typically open with gameplay set to upbeat rock music, then end with a 'Play for Free' CTA promoting the latest season. Cinematic cuts of characters in combat or flying vehicles are also common.

#1 Delta Force by US Mobile Creative Spend Q3 2025

Delta Force's top-spend US mobile creative in Q3 spotlighted a crossover with the anime-style tower-defense game Arknights. In Q3, Arknights' largest geos were China by revenue and Japan by daily active users, with the US ranking third on both.

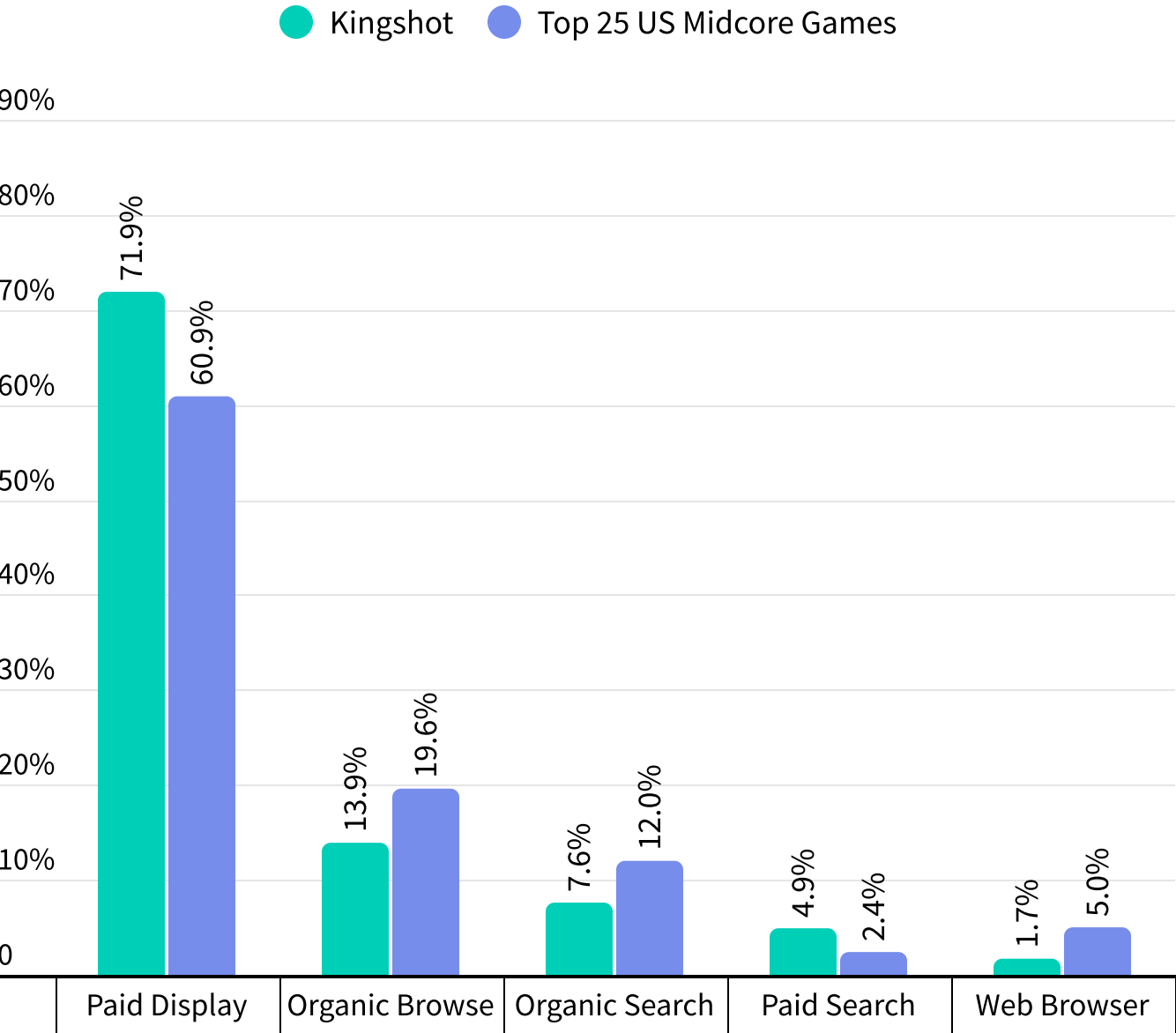
Delta Force's mobile creative mix is broad, also including gameplay cuts, UGC/creator-style recommendations with narration, and social media contests.

Ultra Grower Kingshot Over-Indexes into YouTube in US

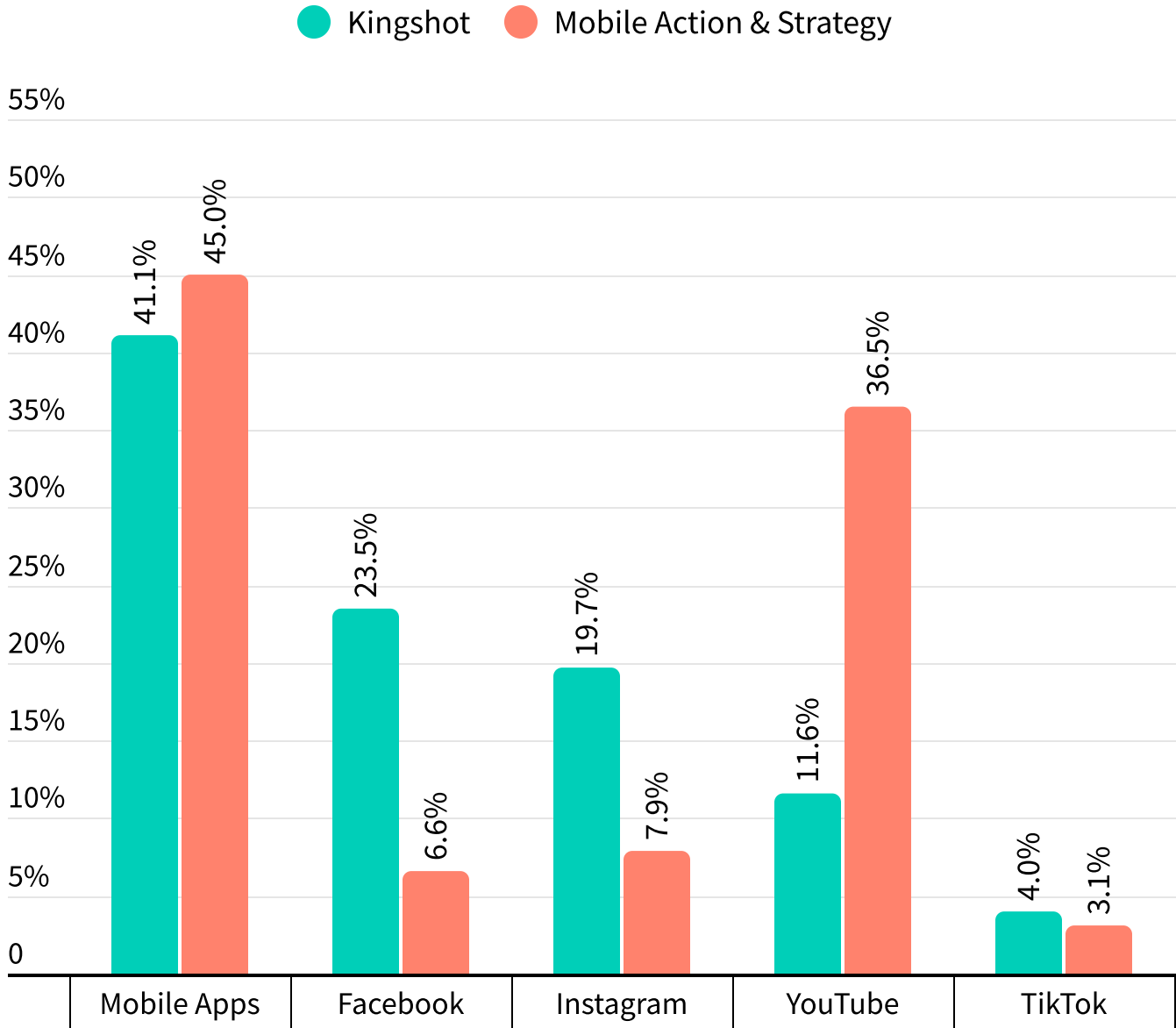
Kingshot drives a higher percentage of downloads from Paid Display compared to the top 25 mobile games by US in-app purchase revenue. Compared to mobile action & strategy as a whole, Kingshot doubled down on YouTube over Facebook and Instagram, while Mobile App Networks were still the core of the mix.



Kingshot Q3 2025 US downloads by source



Kingshot Q3 2025 US ad impressions by network



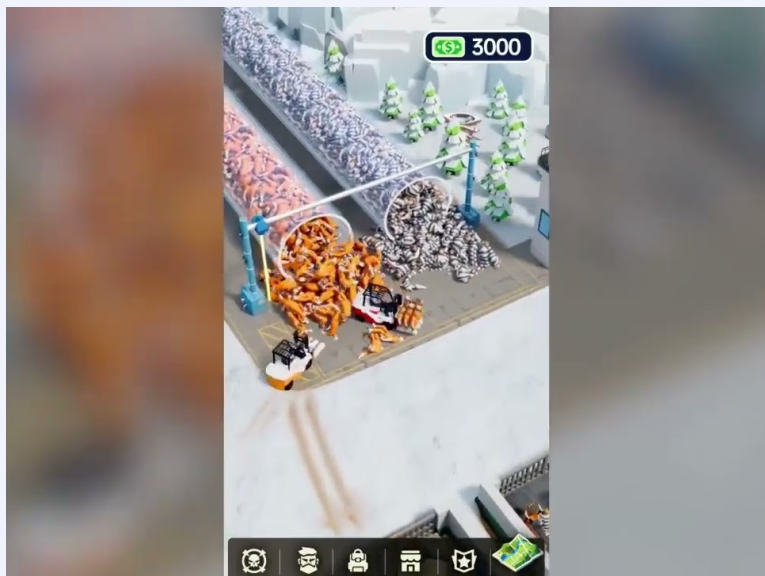
Estimated
\$32 million
US ad spend
in 3Q2025.

Source: Sensor Tower Mobile App Insights, Pathmatics Digital Advertising Insights

Lands of Jail Appears to Use Generative AI to Quickly Create New Concepts

Lands of Jail punches above its weight in creative testing volume. It is the #14 game by US in-app purchase revenue, but #7 in number of creatives run in the US in 3Q2025. Gen AI speeds up the creative creation process, allowing practitioners to generate a wide variety of concepts for testing at breakneck speed. Lands of Jail has a wide variety of concepts among their winning creatives by share of voice. Their #1 creative by worldwide share of voice in Q3 2025 used a hook showing anime girls eating in jail before moving onto some eye catching gameplay. The #6 ad creative showcases a variety of video prison situations with narration, while #9 shows several external prison illustrations as a "Prison Population" counter skyrockets up.

#1 Ad Creative Among Lands of Jail Ads
by Worldwide Share of Voice Q3 2025
Seen on Facebook



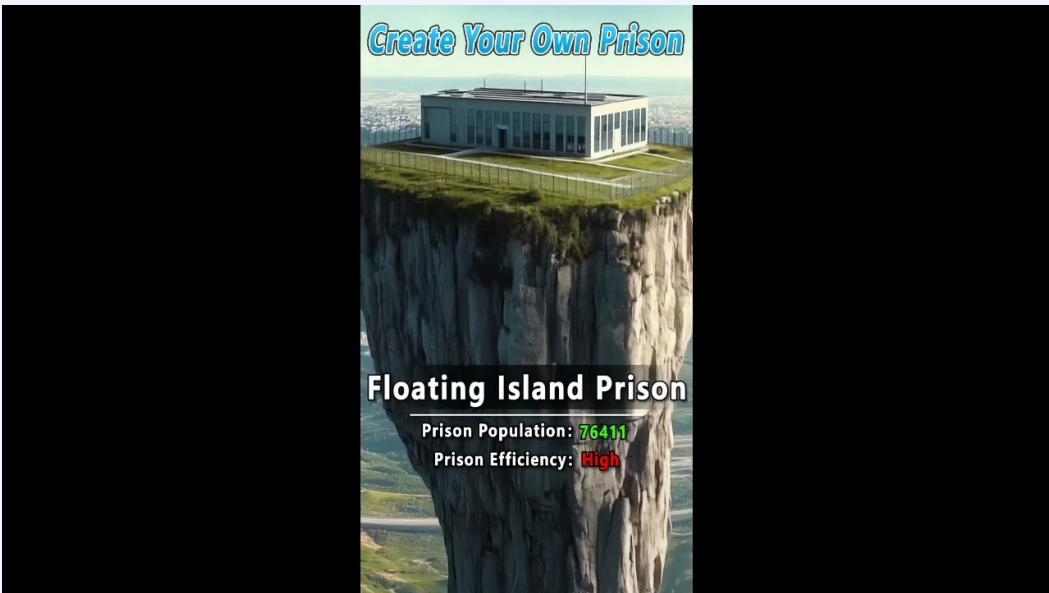
Source: Sensor Tower Mobile App Insights

#6 Ad Creative Among Lands of Jail Ads
by Worldwide Share of Voice Q3 2025
Seen on Instagram



Source: Sensor Tower Mobile App Insights

#9 Ad Creative Among Lands of Jail Ads
by Worldwide Share of voice Q3 2025
Seen on Instagram



Source: Sensor Tower Mobile App Insights

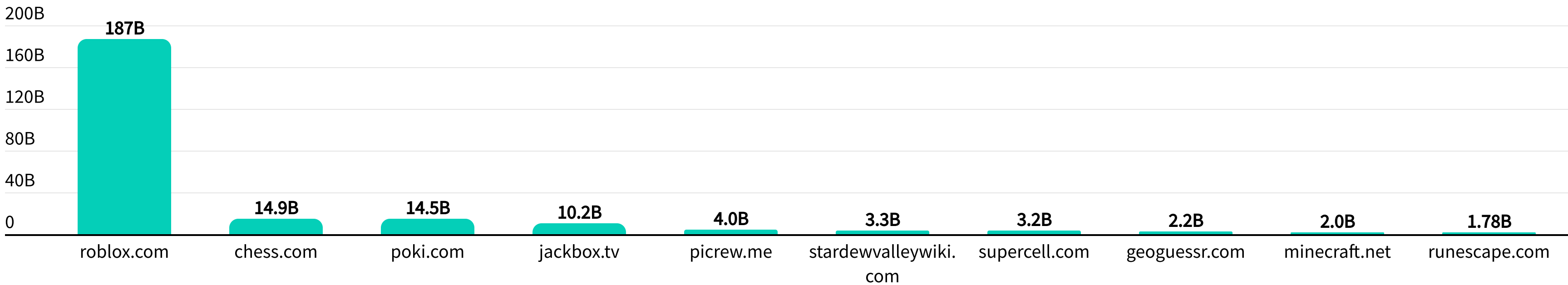
Roblox by Far the Most Visited Gaming Website

89% of visits are direct, organic visits, 7% are through organic search, 4% from social media.



Top Gaming Websites by Total Visits

Worldwide, Q4 2024 - Q3 2025



#1 Roblox website path is /games/*.

The primary use case for visiting the Roblox website is browsing games. 27.9% of roblox.com visits are in the games section.

#1 Roblox game by visits is Grow a Garden.

The Grow a Garden page alone received over 1 billion visits in the past twelve months.

Roblox's webstore was visited 668 million times in the past year.

If this page was its own website, it would still be the 71st most visited gaming website in the world in the past twelve months.

Case Studies

Key Takeaways



Battlefield 6 paired a strong game with a sharp, well-sequenced launch.

The cinematic reveal put Battlefield's core differentiators (scale, vehicles, and destruction) front and center, mobilizing franchise faithful. Creator-driven coverage of the open beta then showcased accessible, yet still unmistakably Battlefield gameplay, broadening appeal, penetrating the US market, and helping drive a record-setting launch.



Royal Kingdom and Kingshot show how to scale in the US in 2025.

In 3Q25, both titles scaled U.S. spend by leaning on performance app networks for efficient acquisition while using social to extend reach and diversify creative tests. Royal Kingdom's aggressive Apple Search Ads mix captured high-intent queries at the point of conversion. Kingshot indexed into YouTube, prioritizing sustained engagement over short-term spikes.



Gen AI accelerates creative generation process to breakneck speed.

From concepts and copy to illustrations and video, Gen AI is accelerating the already blistering speed of creative generation and iteration. Lands of Jail looks to be taking an aggressive tack, testing a wide variety of concepts using Gen AI assets.



Roblox massive web presence opens up new possibilities.

Roblox is the most visited gaming website by a landslide. Their players are interested in browsing games and launching the app directly from the browser. This traffic allows Roblox to provide its audience with unique browser experiences.

Conclusion

Conclusion



The gaming market is healthy and diversifying.

While publishers focus on monetization and UA quality over download volume, several niches have seen huge growth in the past year. Giant publishers are betting on shooters on PC/Console and mobile alike. Kingshot and Royal Kingdom scale on mobile, while shooters resurge on both mobile and PC/Console. Co-op indie games from small teams keep going viral while shockingly high quality AA games receive rave reviews and accolades.

Successful strategies are continuously emerging.

What is content creators' role in reaching audiences for AAA and Indie games? What is the best way to utilize Gen AI in creative iteration workflows? Which channels best fit which campaign goals? The answers to these questions and many others slowly change every day. Strategies must be engineered to campaign goals in today's world, not chosen by habit.

Reaching today's audiences requires the most up-to-date strategy and intelligence.

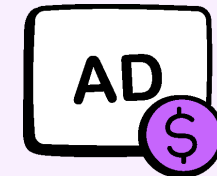
Learning from competitor's failures is much less costly than making the same mistakes yourself. Understanding what channels are working for who, the very latest creative trends, and where growth is coming from today is critical to succeeding tomorrow.

About this Data:

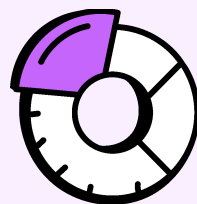
Digital Advertising Methodology



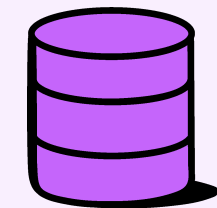
The digital ad spending and impressions estimates presented in this report were compiled by Sensor Tower's Market Insights team using Pathmatics by Sensor Tower Digital Advertising Insights.



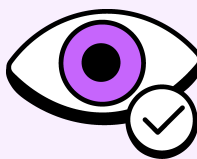
The figures mentioned in this report reflect estimated ad investments made by advertisers through September 30, 2025.



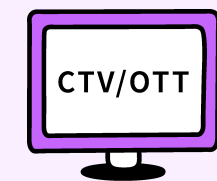
Data includes select channels in each market. Figures in this report represent the totals for these channels only, not across all digital formats.



Data Collection: Pathmatics collects a sample of digital ads from the web. In order to report the most complete picture of the digital advertising landscape, we utilize two leading data sourcing technologies: panels and data aggregators.



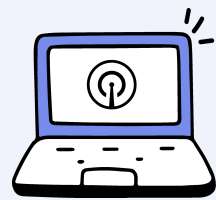
Pathmatics uses statistical sampling methods to estimate impressions, cost per thousand impressions (CPMs), and spend for each creative. Each impression served to our data aggregators and panelists is assigned a CPM, which when combined with impressions results in our spend estimates.



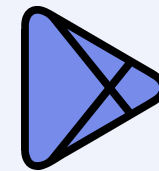
Pathmatics OTT data is powered by a panel of real OTT & CTV viewers and includes data representative of all Smart TV brands, such as Amazon Prime Video, Disney+, HBO Max, Hulu, Netflix, Pluto TV, Tubi, Peacock, and Paramount+.

About this Data:

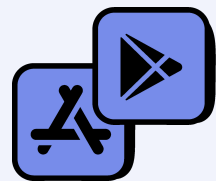
Mobile App Methodology



Sensor Tower's Market Insights team compiled the download and IAP revenue estimates provided in this report using the Sensor Tower Mobile App Insights platform.



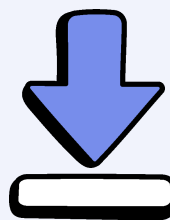
Android app download and revenue estimates represent downloads and revenue from the Google Play Store only. Sensor Tower does not provide download estimates for third-party Android stores.



Figures cited in this report reflect iOS App Store and Google Play download and revenue estimates for January 1, 2014 through September 30, 2025.



In-app purchase (IAP) 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.



Download estimates presented are on a per-user basis, meaning that only one download per Apple or Google account is counted towards the total.



In-app purchase (IAP) revenue estimates are gross — inclusive of any percent taken by the app stores.

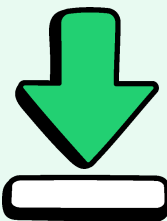
[View Detailed Report Methodology Here.](#)

About this Data:

Video Game Insights (VGI) Methodology



Sensor Tower's Market Insights team compiled the PlayStation, Xbox, and Steam estimates provided in this report using the Sensor Tower Video Game Insights platform.



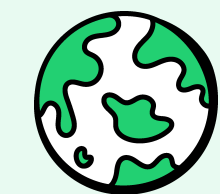
Downloads include free-to-play, games included as part of subscription services like Game Pass, as well as premium units sold.



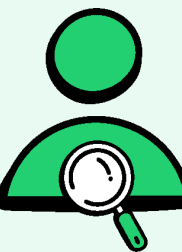
Figures cited in this report reflect PlayStation, Xbox, and Steam (PC) estimates for January 1, 2014 through September 30, 2025.



Premium game revenue is gross and does not include in-game purchases.
Note: in-game spend coming soon!



Video Game Insights covers all games (140k+) across all countries (50+) where the platform is available.



Only games with at least 10,000 units sold/players have player insights and games with at least 100,000 units sold/players have player overlap features available.

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.

Press Inquiries: press@sensortower.com





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