

Cross-Platform Gaming: Bridging Mobile and PC/Console



Sensor Tower

Introduction/Overview

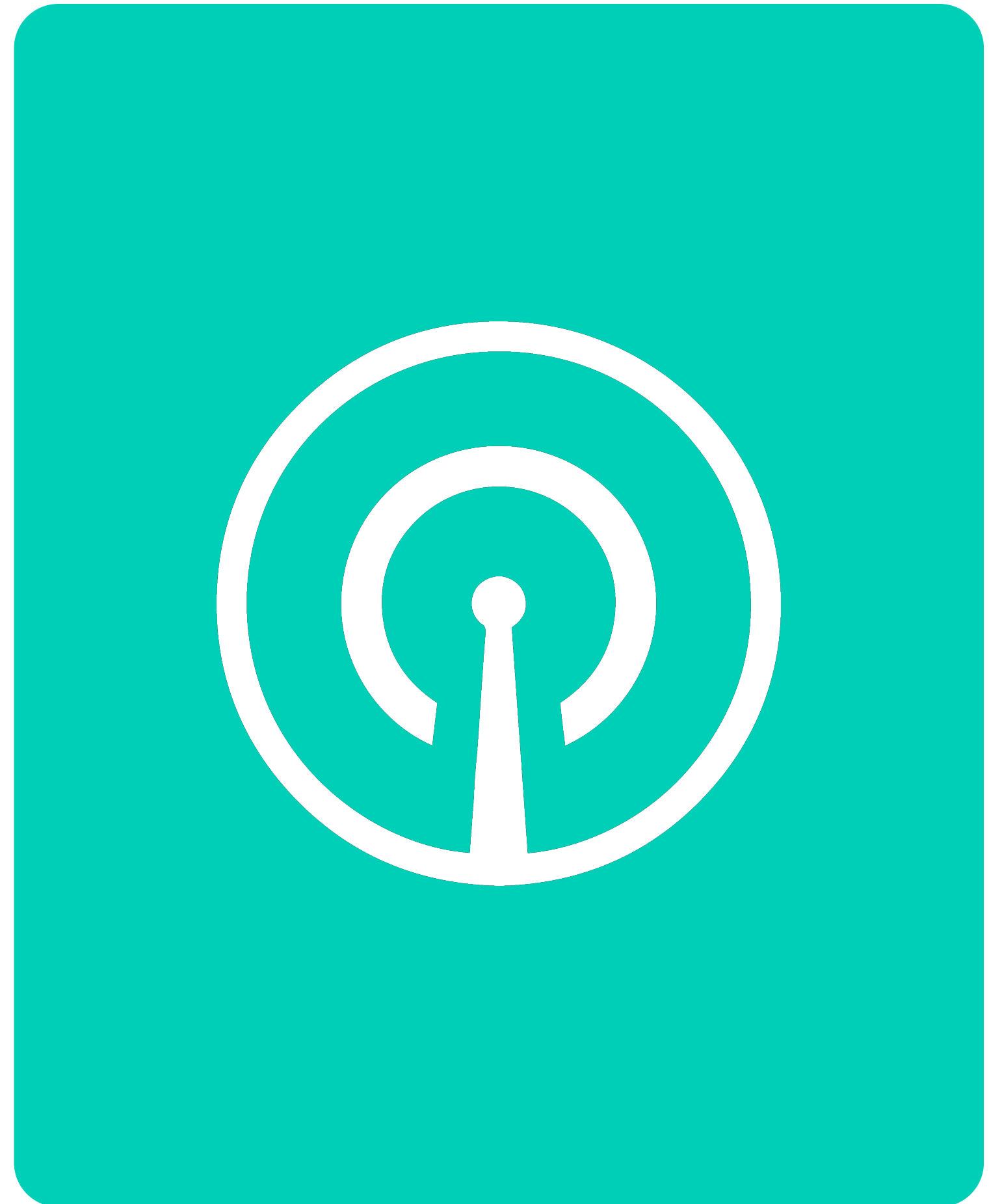
Sensor Tower is the leading source of mobile app, digital advertising, retail media, and audience insights for the largest brands and app publishers across the globe.

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

Founded in 2013, Sensor Tower's mobile app insights have helped marketers, app, and game developers demystify the mobile app landscape with visibility into usage, engagement, and paid acquisition strategies. Today, Sensor Tower's digital market insights platform has expanded to include Audience, Retail Media, Video Game Insights 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-apac@sensortower.com

Business Inquiries: sales@sensortower.com



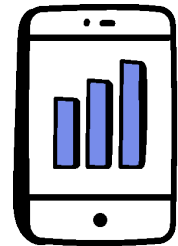
Sensor Tower | Our Customers

Top publishers trust Sensor Tower insights to grow their business.

L'ORÉAL		Google		 European Commission	Disney
petco	HERSHEY	amazon	ROVIO	DOORDASH	depop
Walmart		Microsoft	SEGA	dyson	SONY
 fetch REWARDS		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

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Sensor Tower **App Performance Insights**

**For those who need visibility
into the mobile app ecosystem.**

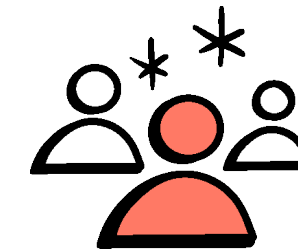
Enjoy insight into: app rankings, downloads, and revenue; active users, demographics, retention, sessions, and time spent; app ratings and reviews, keywords, search ads, and more.



Sensor Tower **App Advertising Insights**

**For those who need visibility
into paid user acquisition
strategies.**

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



Sensor Tower **Audience Insights**

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

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

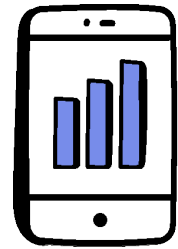


Sensor Tower **Pathmatics Digital Advertising Insights**

**For those who need visibility
into the digital ad ecosystem.**

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

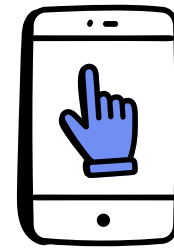
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Gaming Insights

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

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



Sensor Tower Advanced Usage Insights

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

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



Sensor Tower Pathmatics Retail Media Insights

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

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



Sensor Tower Video Game Insights

Discover top game trends on PC and Console platforms

Get deep insights into key metrics like sales, revenue, DAU, and MAU for over 140,000 PC and Console games across 100+ global markets. Analyze shifts in player behavior to uncover critical intelligence on player acquisition and retention.

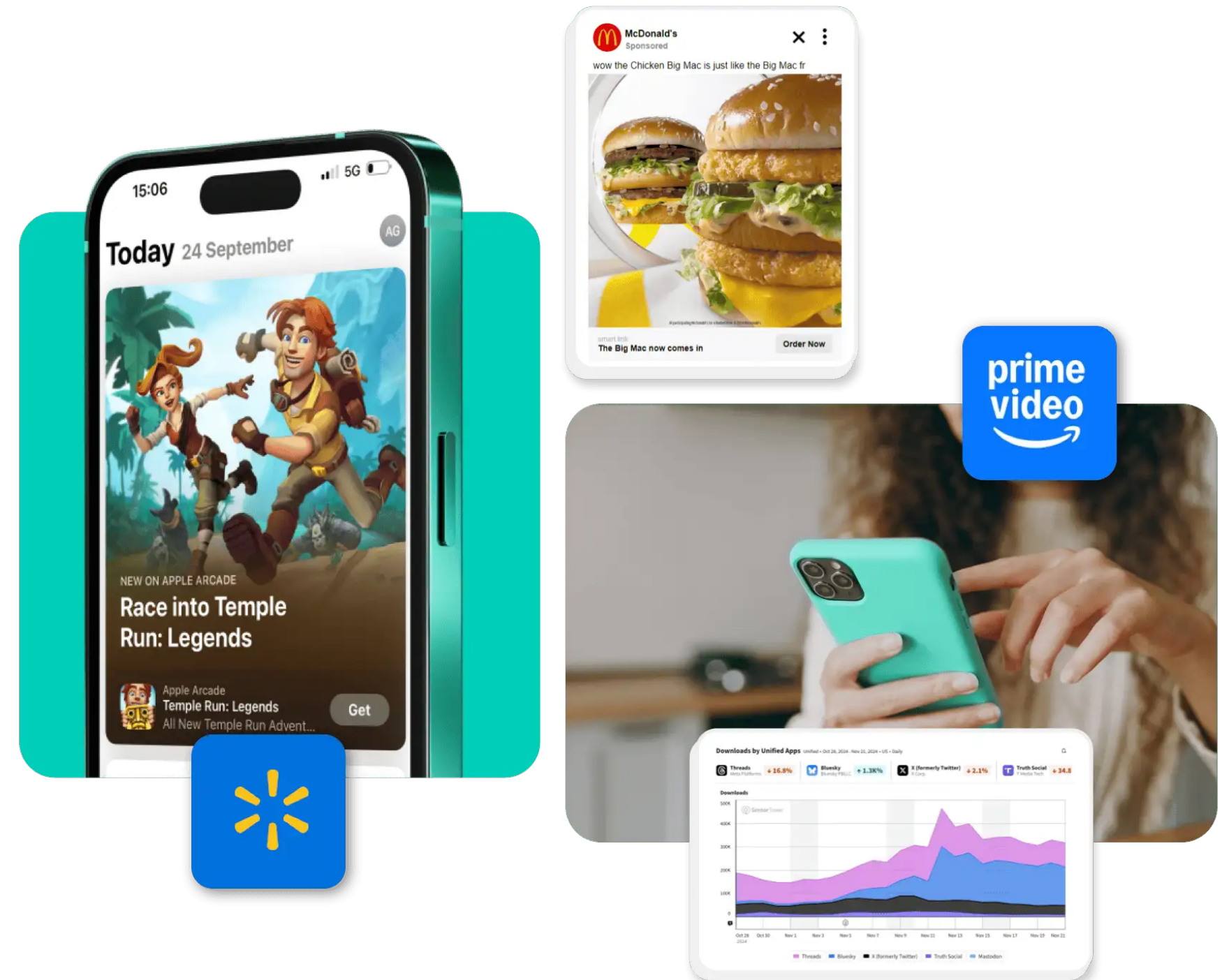
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Executive Summary

The modern gaming landscape is defined by two powerful forces: **Mobile**'s vast accessibility and **PC/console**'s premium depth. Though built on different models and player behaviors, their synergy creates significant growth potential. Mobile drives global discovery, while PC and console foster loyalty and lasting franchises. To succeed in today's increasingly converging gaming economy, publishers must connect mobile's reach with PC/console's depth through purposeful cross-platform design. This report outlines strategies for building resilient, cross-platform portfolios that capture the best of both worlds.

Clarification on Mobile App Revenue and Downloads Data

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



Sensor Tower

Data & Methodology

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

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

Digital Advertising Channels Supported by Pathmatics Across Markets

	Desktop Display and Video	Facebook Instagram	LINE	Linkedin	Mobile App Ad Networks	Mobile Display and Video	OTT	Pinterest	Reddit	Snapchat	TikTok	X	YouTube
United States	•	•		•	•	•	•	•	•	•	•	•	•
Australia	•	•				•		•	•	•	•		•
Brazil		•		•				•	•		•	•	
Canada	•	•		•	•	•		•	•	•	•		•
France		•		•				•	•	•	•		•
Germany	•	•		•	•	•		•	•	•	•		•
India		•						•	•	•		•	
Italy		•						•	•	•	•		•
Japan		•	•		•						•	•	•
Mexico		•									•		•
New Zealand	•	•				•							•
South Korea		•			•						•		•
Spain		•						•	•	•	•	•	•
United Kingdom	•	•		•	•	•		•	•	•	•	•	•

Agenda

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Gaming Landscape: A Tale of Two Ecosystems

Gaming's Dual Dynamics:

Mobile's Scale & PC/Console's Premium Core

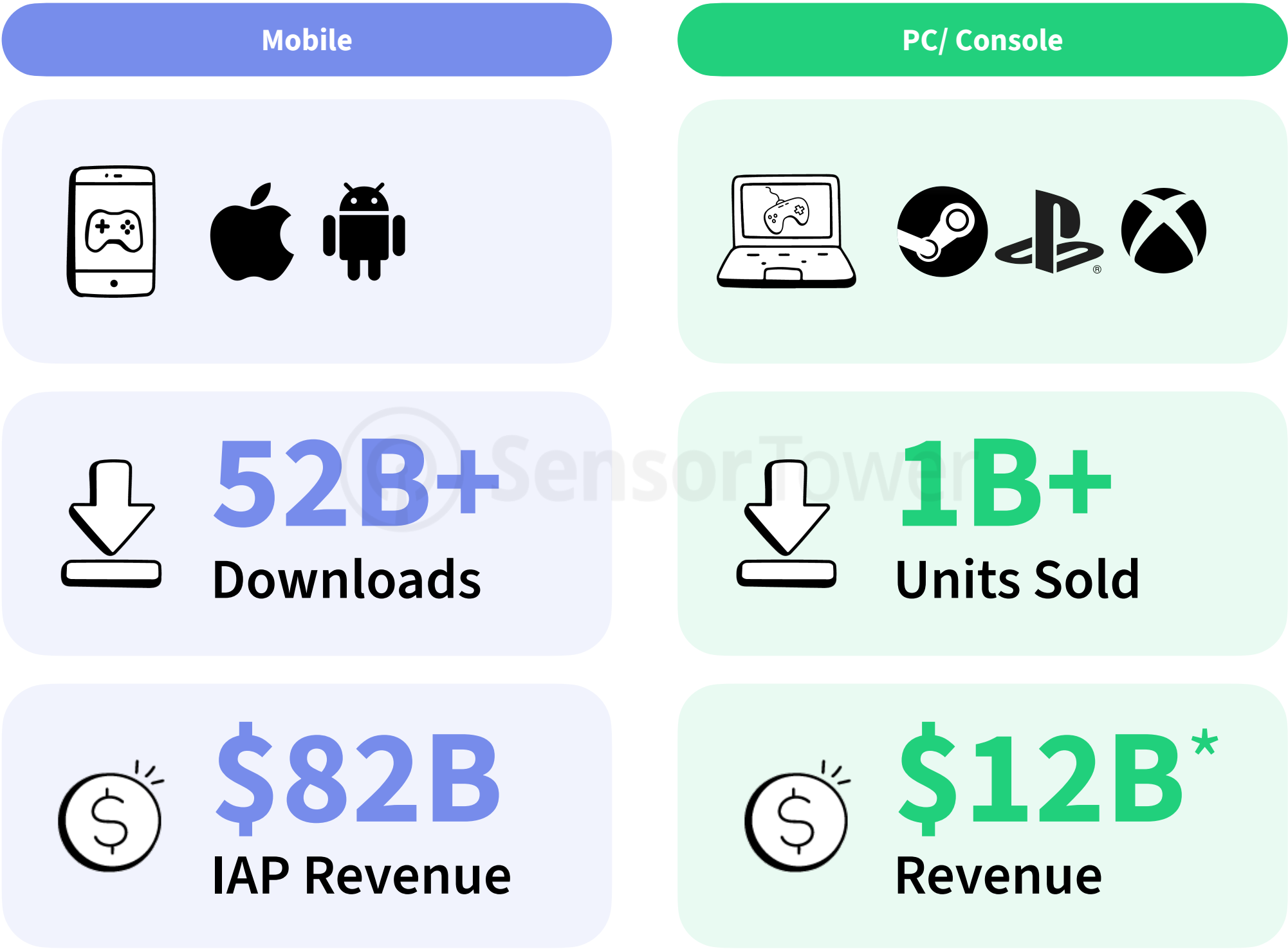
The 2025 gaming market revolves around two forces: mobile's unmatched global scale and PC/console's premium depth.

Mobile drives mass reach and discovery, with **52 billion** downloads and **\$82 billion in IAP revenue**, serving as the main gateway for new IPs. PC/console generates over **\$12 billion** from **1 billion units**, anchoring high-value engagement and brand prestige.

Mobile excels in scale; PC/console in revenue per unit. The winning strategy is to let mobile's broad funnel feed premium ecosystems—maximizing total franchise growth across platforms.

Source: Sensor Tower App Performance Insights, Video Game Insights
Note: iOS and Google Play combined. iOS only for China. PC/ Console Units Sold (Steam, Playstation and XBOX) include free-to-play, games included as part of subscription services like Game Pass, as well as premium units sold. 2025 Forecast based on 1/1/25 - 9/30/25 estimates. Revenue estimates only for Steam.

Worldwide Gaming Market Size by Platform 2025*



Converting Mobile Momentum into Premium Engagement

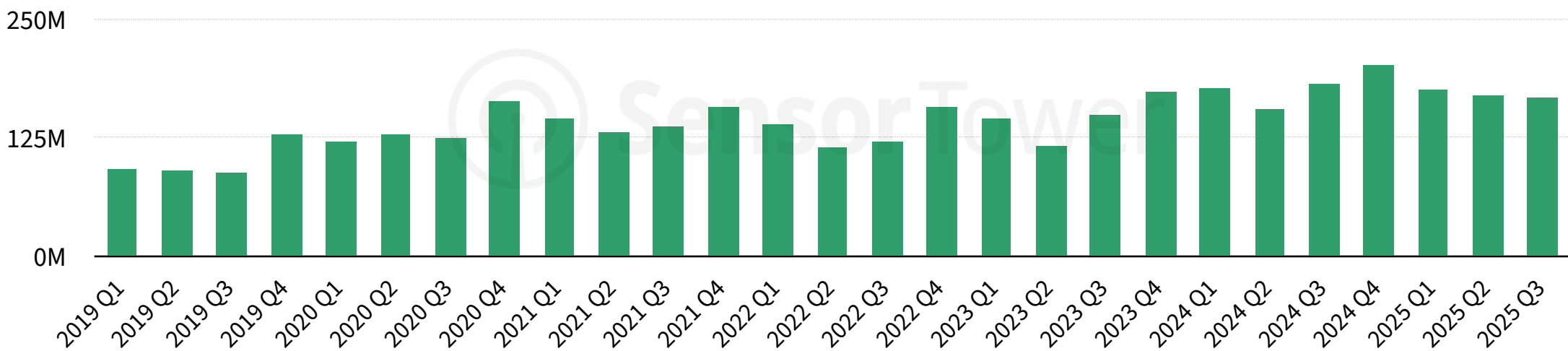
Given the accessibility of mobile devices, mobile gaming delivers unmatched global reach and serves as the industry’s primary discovery engine. With iOS and Google Play downloads exceeding **12.5 billion each quarter**, it provides a steady pipeline for user acquisition and brand exposure—forming a stable foundation for publisher portfolios.

PC and console platforms, led by Steam’s **170 million quarterly unit sales**, anchor the premium segment with high engagement, strong per-unit revenue, and loyal communities—especially during major Q4 releases.

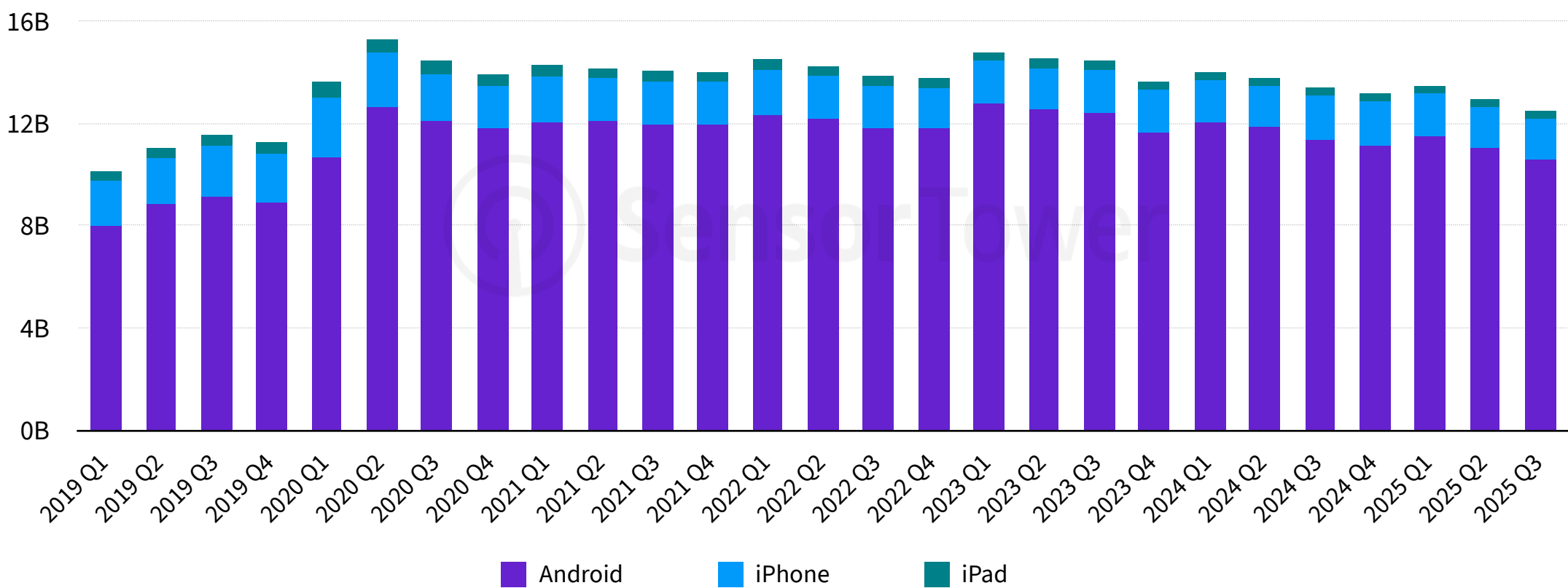
A balanced portfolio harnesses both: mobile’s consistent reach feeding premium PC/console experiences. This approach maximizes audience growth and revenue while converting mobile scale into lasting brand value.

Source: Video Game Insights, Sensor Tower App Performance Insights
Note: iOS and Google Play combined. iOS only for China. Video Games Downloads include free-to-play, games included as part of subscription services like Game Pass, as well as premium units sold. 2025 Forecast based on 1/1/25 - 9/30/25 estimates.

Steam Quarterly Units Sold - 2019 to 2025 Q3 - Worldwide



Mobile Games (iOS & Google Play) Quarterly Downloads - 2019 to 2025 Q3 - Worldwide



Mobile's Scale Fuels Steady Growth, While PC/Console Delivers Revenue Peaks

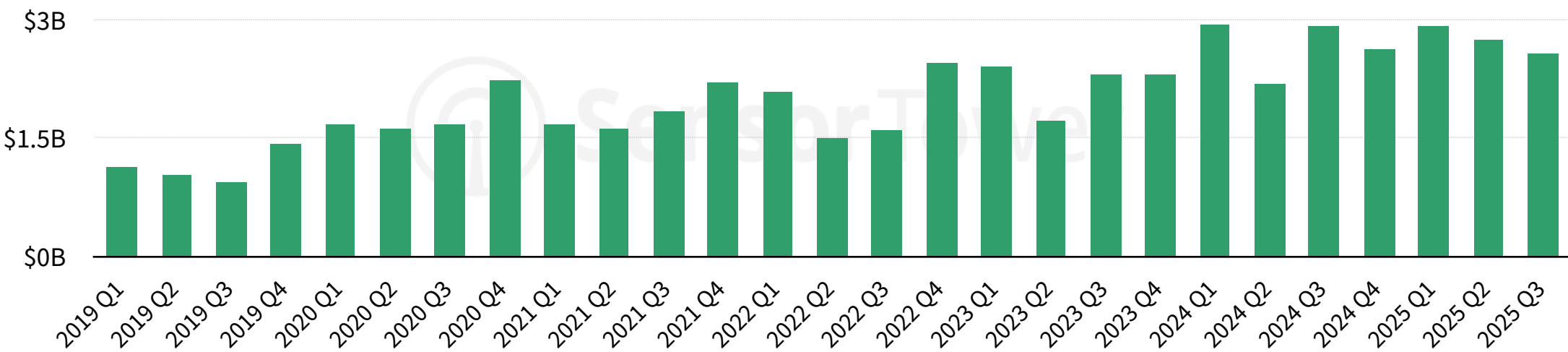
Mobile's vast scale continues to drive steady, long-term growth. With billions of users and strong in-app purchase momentum surpassing **\$20 billion** per quarter, it provides a dependable foundation for sustained portfolio expansion.

PC and console platforms, in contrast, generate concentrated surges from major releases and holiday cycles, with **Steam quarterly peaks nearing \$3 billion**. These high-impact launches deliver premium engagement and reinforce brand value.

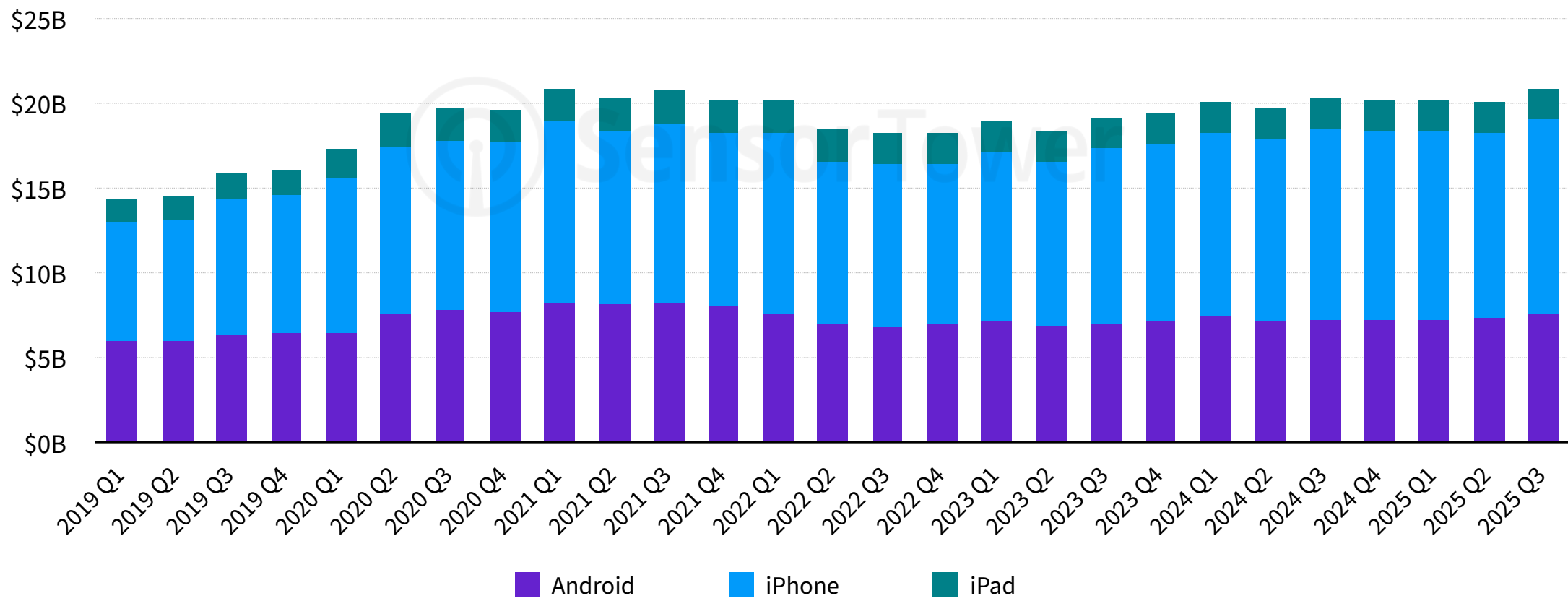
Together, mobile's broad, recurring reach and PC/console's high-intensity peaks form a complementary rhythm—creating both stability and lift across a publisher's cross-platform portfolio.

Source: Video Game Insights, Sensor Tower App Performance Insights
Note: iOS and Google Play combined. iOS only for China. Video Games Downloads include free-to-play, games included as part of subscription services like Game Pass, as well as premium units sold. 2025 Forecast based on 1/1/25 - 9/30/25 estimates.

Steam Quarterly Revenue - 2019 to 2025 Q3 - Worldwide



Mobile Games (iOS & Google Play) Quarterly IAP Revenue - 2019 to 2025 Q3 - Worldwide



Mobile Leaders: Driving Discovery, Deepening Monetization, and Unlocking Cross- Platform Growth





















Top mobile titles continue to power global discovery, led by accessible hits like [Roblox](#), [Garena Free Fire](#), and [Block Blast!](#). High-volume genres—Arcade, Simulation, and Puzzle—remain essential entry points for user acquisition and brand visibility across markets.

Revenue leaders stand out for their ability to sustain long-term monetization. Strategy franchises such as [Last War: Survival](#), [Whiteout Survival](#), and [Honor of Kings](#) demonstrate how well-optimized systems can transform scale into enduring player spending.

Yet, most leading titles remain mobile-first. As publishers look ahead, adapting proven mobile IPs into PC and console ecosystems represents a major untapped opportunity—turning mobile’s reach into lasting, cross-platform franchise value.



2025 YTD Top 10 Mobile Games - Unified | Jan 1, 2025 - Sep 30, 2025

Downloads					Revenue				
				vs 2024					vs 2024
1		Roblox Roblox Corporation	Simulation Sandbox	▲ 1		Last War: Survival FUNFLY	Strategy 4X Strategy	▲ 2	
2		Garena Free Fire Garena Games Online	Shooter Battle Royale	▼ 1	2		Whiteout Survival Century Games	Strategy 4X Strategy	▲ 5
3		Block Blast! HungryStudio	Puzzle Block	▲ 1	3		Honor of Kings Tencent	Strategy MOBA	▲ 1
4		Subway Surfers Miniclip.com	Arcade Platformer / Runner	▼ 1	4		Royal Match Dream Games, Ltd.	Puzzle Match Swap	▼ 2
5		Ludo King Gametion	Tabletop Board	▲ 1	5		MONOPOLY GO! Scopely	Casino Coin Looters	▼ 4
6		Pizza Ready! Supercent	Simulation Idler	▼ 1	6		Candy Crush Saga Microsoft Corporation	Puzzle Match Swap	=
7		Hole.io Voodoo	Arcade Other Arcade	▲ 14	7		Coin Master Moon Active	Casino Coin Looters	▲ 3
8		My Talking Tom 2 Outfit7	Lifestyle Virtual Pet	=	8		Game For Peace Tencent	Shooter Battle Royale	▲ 3
9		Vita Mahjong Vita Studio	Puzzle Match Pair	▲ 67	9		Roblox Roblox Corporation	Simulation Sandbox	▼ 4
10		EA SPORTS FC Mobile Electronic Arts	Sports Realistic Sports	▲ 2	10		Pokémon TCG Pocket The Pokémon Company	Strategy Card Battler	▲ 1

Data Source: Sensor Tower App Performance Insights as of October 31, 2025.
Notes: Sensor Tower’s data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and third-party Android stores. Revenue is gross — inclusive of any percent taken by the app stores.

IP Franchises Dominate PC and Console — and Set the Stage for Cross-Platform Growth

The 2025 PC and console charts are led by established AAA franchises such as *Marvel Rivals*, *EA SPORTS FC 25*, and *Monster Hunter Wilds*, underscoring the continued strength of blockbuster IPs in driving premium engagement and repeat sales.




















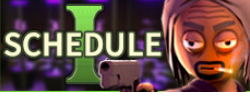







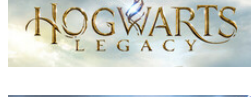








These titles build long-term brand equity through live updates, esports events, and DLC pipelines that sustain loyal player communities and recurring revenue across years. Their depth and quality anchor publisher portfolios and define the premium end of the market.

Yet, many of these leading IPs remain confined to PC and console ecosystems. Extending them into mobile through companion apps, adaptations, or shared progression experiences represents a major opportunity to expand reach, enhance retention, and strengthen franchise continuity across platforms.

Data Source: Video Game Insights, Sensor Tower
Note: Units Sold include free-to-play, games included as part of subscription services like Game Pass, as well as premium units sold. 2025 YTD range is 1/1/25 - 9/30/25.



2025 YTD Top 10 PC/ Console Games By Units - Jan 1, 2025 - Sep 30, 2025

Steam		Playstation		Xbox	
1	 Marvel Rivals Hero Shooter	1	 skate. Simulation Sports	1	 skate. Simulation Sports
2	 PEAK Idler & Clicker	2	 EA SPORTS FC 25 Simulation Sports 	2	 Marvel Rivals Hero Shooter
3	 R.E.P.O. Survival Horror	3	 Marvel Rivals Hero Shooter	3	 RE/MATCH Arcade Sports
4	 Monster Hunter Wilds Action RPG	4	 Roblox Sandbox 	4	 EA SPORTS FC 25 Simulation Sports 
5	 Delta Force Arena Shooter	5	 NBA 2K25 Simulation Sports 	5	 UFC 5 Simulation Sports
6	 Schedule I Job Simulator	6	 EA SPORTS FC™ 26 Simulation Sports	6	 Stardew Valley Life Simulator 
7	 Hollow Knight: Silksong Metroidvania	7	 UFC 5 Simulation Sports	7	 The Elder Scrolls IV: Oblivion Action RPG
8	 Split Fiction Action-Adventure	8	 Hogwarts Legacy Action RPG	8	 Battlefield™ 6 Open Beta Arena Shooter
9	 Clair Obscur: Expedition 33 Turn-Based RPG	9	 God of War Ragnarök Action-Adventure	9	 Police Simulator: Patrol Officers Job Simulator
10	 ELDEN RING NIGHTREIGN Hero Shooter	10	 Minecraft Sandbox 	10	 Grounded 2 Survival Craft



Blueprints for Expansion: Strategic Models for Cross- Platform Development

Turning IP into Ecosystems: How Publishers Scale Across Platforms


As franchises expand beyond single-platform success, publishers increasingly design IP with multi-platform ecosystems in mind. From companion apps that extend engagement to full cross-play experiences that unite communities, each approach offers a distinct path to growth. These models illustrate how publishers can strategically evolve IP across platforms—balancing accessibility, monetization depth, and brand consistency to sustain long-term franchise value.


The Companion App Model


A mobile app that enhances the core PC/Console experience (e.g., inventory management, social features).

Pros: Drives engagement for the core title, low development cost.

Cons: Limited standalone revenue potential.

Examples:
 [EA Sports FC 25 Companion App](#) enables players to manage squads and the Transfer Market from mobile, sustaining activity in Ultimate Team between sessions.

 [NBA 2K25 MyTEAM App](#) lets users track cards, manage collections, and bid in the Auction House on the go.


 [Warframe Companion](#) helps players manage Foundry builds, claim crafted items, deploy extractors, and track in-game alerts from mobile.


The “Lite” Version Model


A simplified, free-to-play version of the core game for mobile, designed for mass acquisition.

Pros: Massive discovery funnel, introduces IP to a new audience.

Cons: Can risk devaluing the premium version if not positioned carefully.

Examples:
 [PUBG Mobile](#) successfully reimagines the PC/Console battle royale for mobile players, driving over a billion downloads while maintaining the brand’s competitive identity.

 [eFootball Mobile](#) brings the long-running PES franchise into a free-to-play ecosystem, expanding its audience while aligning with global football fandom.


 [The Sims Mobile](#), which distills the core life simulation experience of the premium PC franchise into an accessible, free-to-play mobile format.


The Adapted Experience Model


A new, standalone game on mobile using the same IP but with mechanics and monetization designed specifically for the platform (e.g., a 4X Strategy game based on a PC RPG world).

Pros: Maximizes revenue potential on mobile, expands the IP’s universe.

Cons: Highest development cost and risk.

Examples:
 [Fallout Shelter](#) reimagines Bethesda’s Fallout universe as a vault-management sim, successfully broadening franchise reach beyond its core RPG roots.

 [Final Fantasy Brave Exvius](#) builds a new mobile RPG experience with original storytelling and gacha systems, expanding the Final Fantasy brand to a new generation of players.


 [The Elder Scrolls: Blades](#) adapts the open-world fantasy of Skyrim into a streamlined mobile dungeon crawler, showcasing how console IP can retain depth in shorter play sessions.


The Full Cross-Platform/Progression Model

A single, identical game experience is delivered across PC, Console, and Mobile, often with shared progression and cross-play functionality, allowing users on any platform to play together.

Pros: Largest possible unified community, maximizes player retention by allowing engagement on any device, and streamlines marketing efforts.

Cons: Highest technical complexity and cost, potential for competitive imbalance between platforms (e.g., keyboard vs. controller vs. touch), and requires a design that works across all input methods.

Examples:
 [Roblox](#) operates as a cross-platform creation ecosystem, letting users build, play, and socialize seamlessly across PC, console, and mobile.

 [Genshin Impact](#) delivers a unified open-world RPG experience across PC, PlayStation, and mobile, maintaining identical gameplay and shared progression.

 [Delta Force](#) supports cross-progression between Mobile, PC and consoles, reinforcing the game’s engagement through portability.

Connected Play: How Companion Apps Strengthen Engagement Across Platforms

Companion apps extend the life of live-service games by keeping players active beyond the main platform. They enable features like inventory management, trading, and event tracking—turning idle time into meaningful engagement that sustains daily interaction across ecosystems.

Popular examples include the [EA Sports FC 26 Companion App](#) , [NBA 2K25 MyTEAM App](#) , and [Warframe Companion](#). Each connects seamlessly with its console or PC counterpart, letting players manage squads, track progress, or coordinate with teams anytime, anywhere.

Companion apps may lead to stronger retention, higher engagement hours, and recurring spending—ensuring that players remain connected to the franchise even when they’re not actively playing the core game.

Source: Video Game Insights, Sensor Tower App Performance Insights
Note: iOS and Google Play combined. iOS only for China. Video Games Downloads include free-to-play, games included as part of subscription services like Game Pass, as well as premium units sold. 2025 Forecast based on 1/1/25 - 9/30/25 estimates.

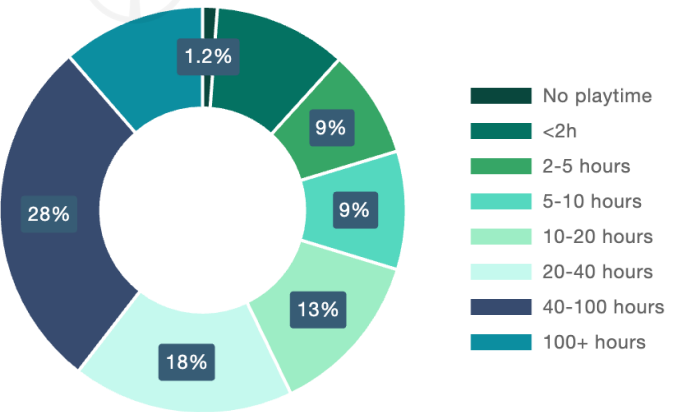
EA SPORTS FC™ 26 Companion

Electronic Arts

Global App Downloads	78 Million
Peak Avg Time Spent	32 Minute/day
Peak Session Count	10 Sessions/ day

EA SPORTS FC™ 26

Steam, Playstation, XBOX



With **78M downloads**, EA’s *FC Companion App* bridges yearly releases through daily squad management and Transfer Market activity.

Over **50% of players spend 20+ hours** in the main game, showing how mobile extensions sustain Ultimate Team engagement year-round.

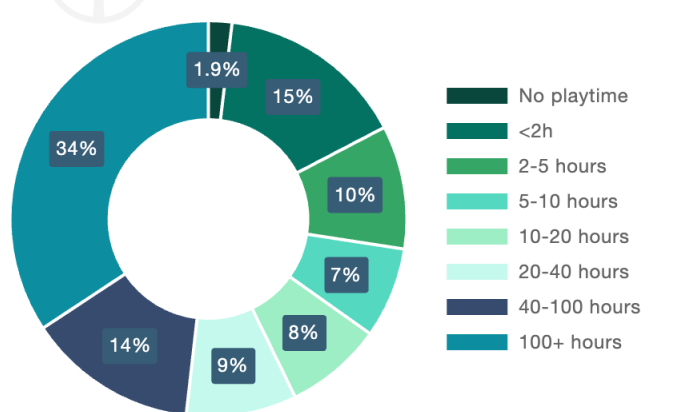
NBA 2K25 MyTEAM

Take-Two Interactive

Global App Downloads	4.7 Million
Peak Avg Time Spent	36 Minute/day
Peak Session Count	5 Sessions/ day

2K25

Steam, Playstation, XBOX



Downloaded **4.7M times**, *NBA 2K25 MyTEAM* lets players track cards and bid in the Auction House on the go. **Nearly half of players** log **40+ hours on PC/console**, reflecting how portable tools strengthen long-term engagement.

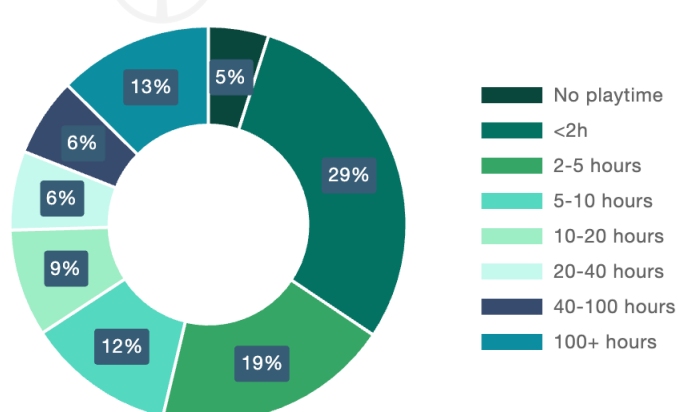
Warframe Companion

Digital Extremes

Global App Downloads	3.5 Million
Peak Avg Time Spent	3 Minute/day
Peak Session Count	3 Sessions/ day

Warframe

Steam, Playstation, XBOX



With **3.5M downloads**, *Warframe Companion* keeps players connected through crafting and alert tracking.

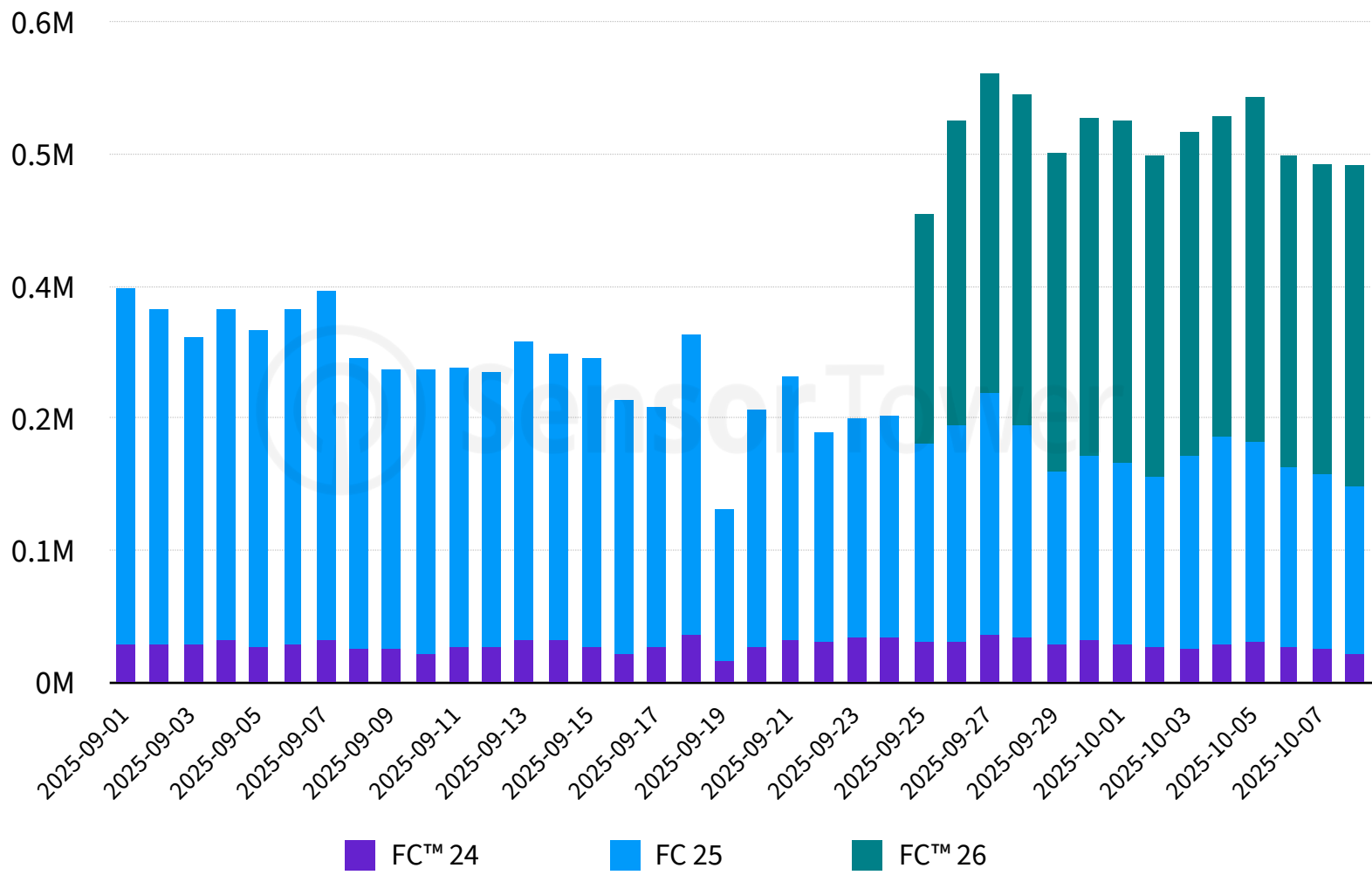
Around **40% of players spend 20+ hours** in the main game, underscoring how mobile integration supports highly dedicated communities.

EA SPORTS FC 26: Unified Companion App Bridge Yearly PC/ Console Releases

Source: Video Game Insights, Sensor Tower App Performance Insights



EA SPORTS FC™ 24 - 26 DAU
Steam



Each yearly **EA SPORTS FC** release is unified through the same companion app, allowing players to transition smoothly between titles. Shared systems and interfaces keep activity continuous, reducing churn and ensuring every new launch inherits an already engaged player base.

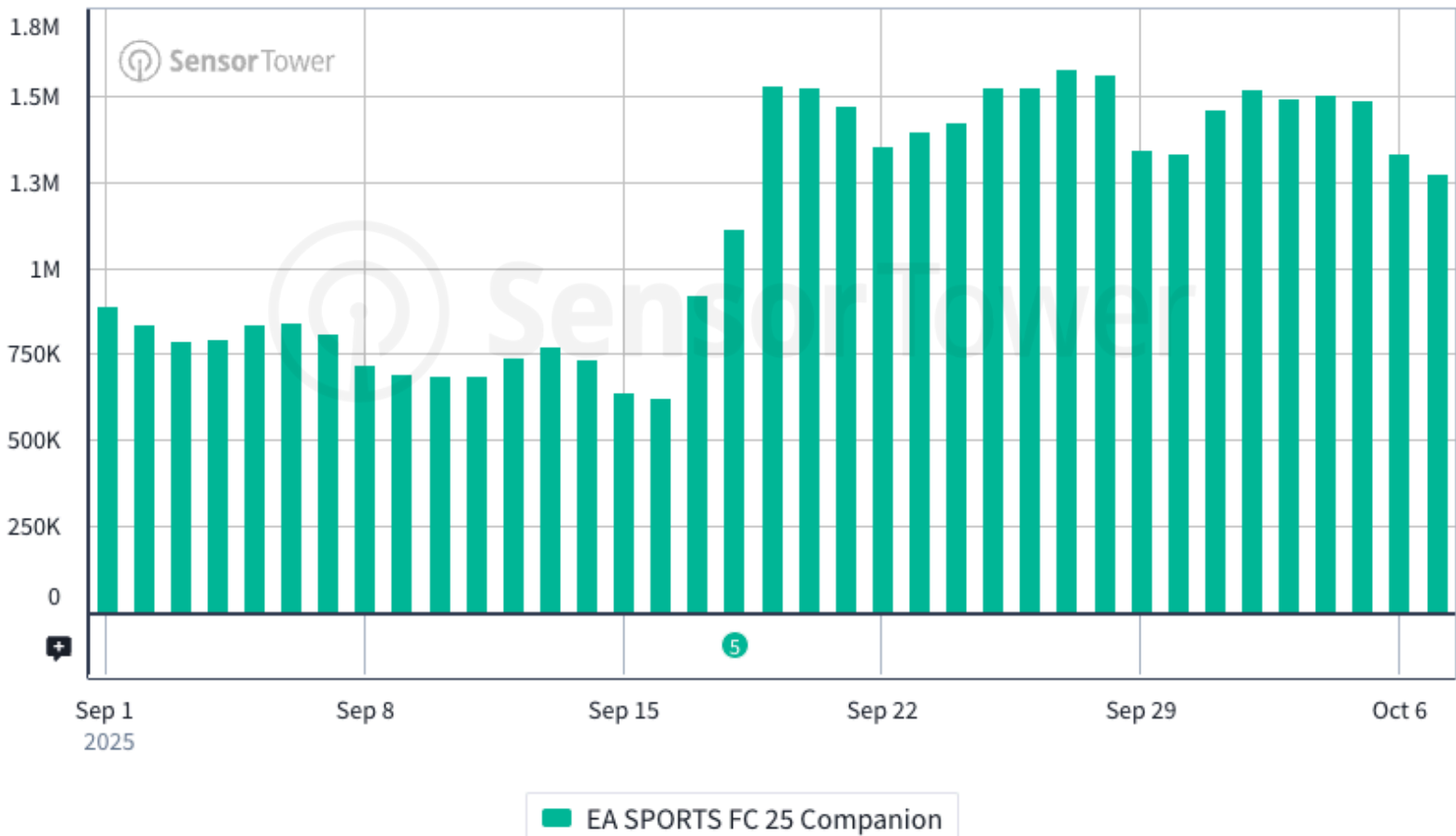
Daily Active Users by Unified Apps

Unified • Sep 1, 2025 - Oct 7, 2025 • All Countries/Regions • Daily

Advanced Usage Insights

EA SPORTS FC 25 Co...
Electronic Arts
↑ 50.0%

Daily Active Users



This unified ecosystem sustains engagement beyond individual releases. Returning players seamlessly resume management, trading, and team-building across seasons, maintaining loyalty and consistent daily activity. The companion app effectively bridges annual game updates, reinforcing long-term retention and franchise stability.

Lite Versions: Expanding Reach and Discovery for Global Franchises

Lite versions reimagine premium PC and console games for mobile audiences through simplified gameplay and free-to-play models. They act as large-scale discovery funnels, enabling franchises to reach players in markets where console adoption remains limited.

Successful examples include [PUBG Mobile](#), [eFootball](#), and [The Sims Mobile](#), each bringing established IPs to new audiences. These mobile versions preserve the franchise’s identity while tailoring gameplay and monetization to suit shorter sessions and broader accessibility.

Their importance lies in expanding player bases and brand recognition. Lite versions not only drive massive download volumes and recurring engagement but also sustain long-term franchise visibility—turning mobile accessibility into a powerful engine for cross-platform growth.

Source: Video Game Insights, Sensor Tower App Performance Insights
Note: iOS and Google Play combined. iOS only for China. Video Games Downloads include free-to-play, games included as part of subscription services like Game Pass, as well as premium units sold. 2025 Forecast based on 1/1/25 - 9/30/25 estimates.



PUBG Battle Grounds
Steam, Playstation, XBOX

PC/ Console Units Sold	110 Million
Avg Playtime	205.2 Hours
Genre	Shooter
Subgenre	Battle Royale
First Release	Dec 2017



PUBG Mobile
Tencent

Global Downloads	1.5 Billion
Peak Avg Time Spent	92 Minute/day
Peak Session Count	7.4 Sessions/ day

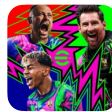


[PUBG Mobile](#) successfully reimagines the PC/ Console battle royale for mobile players, driving over a billion downloads while maintaining the brand’s competitive identity.



eFootball
Steam, Playstation, XBOX

PC/ Console Units Sold	32.7 Million
Avg Playtime	34.4 Hours
Genre	Sports
Subgenre	Simulation Sports
First Release	Sep 2021

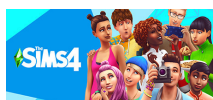


eFootball
KONAMI

Global Downloads	294 Million
Peak Avg Time Spent	72 Minute/day
Peak Session Count	7 Sessions/ day



[eFootball](#) brings the long-running PES franchise into a free-to-play ecosystem, expanding its audience while aligning with global football fandom.



The Sims 4
Steam, Playstation, XBOX

PC/ Console Units Sold	52.8 Million
Avg Playtime	36.7 Hours
Genre	Simulation
Subgenre	Life Simulator
First Release	Nov 2017



The Sims Mobile
Electronic Arts

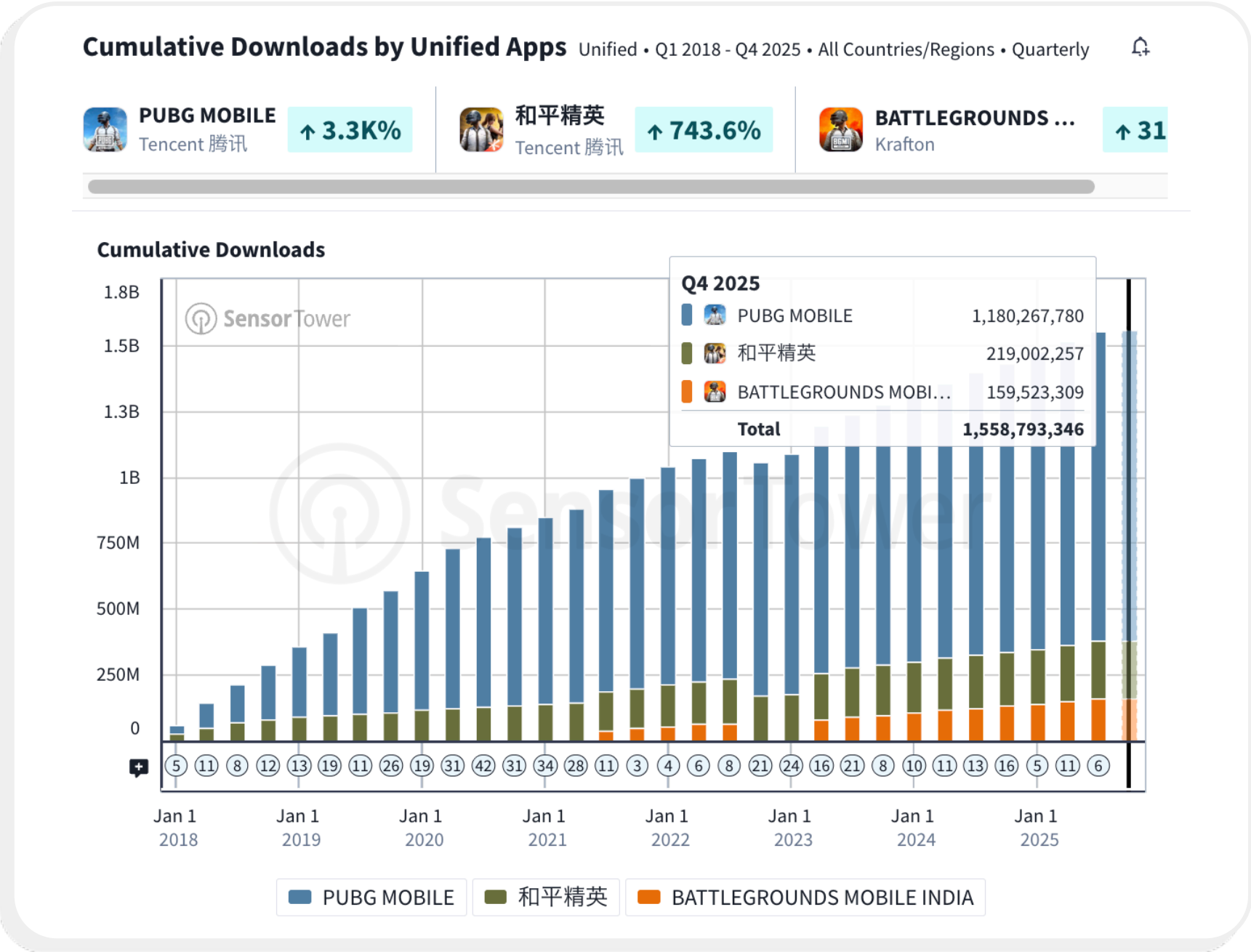
Global Downloads	150 Million
Peak Avg Time Spent	32 Minute/day
Peak Session Count	6 Sessions/ day



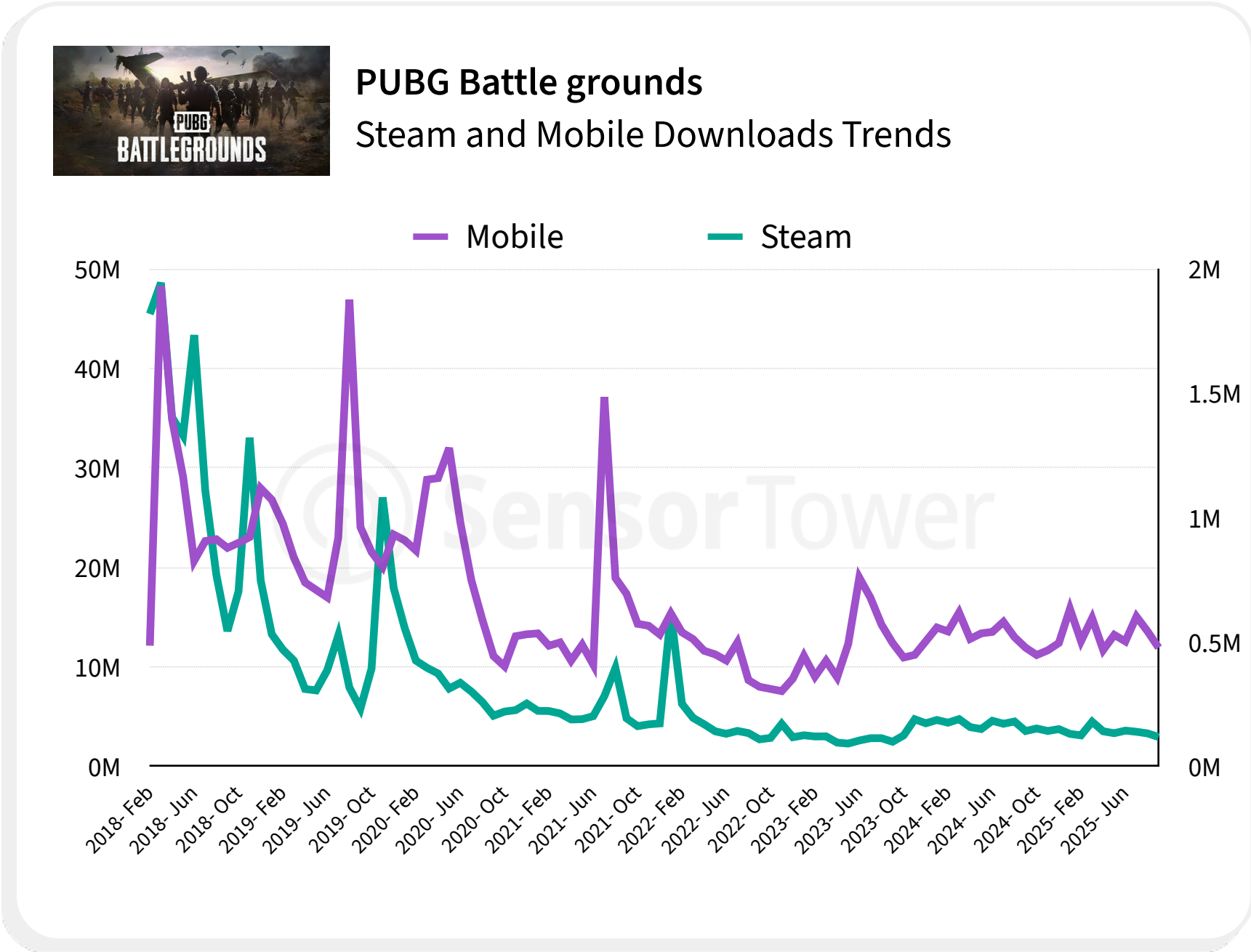
[The Sims Mobile](#), which distills the core life simulation experience of the premium PC franchise into an accessible, free-to-play mobile format.

PUBG Mobile: Expanding the Franchise and Revitalizing PC Engagement

Source: Video Game Insights, Sensor Tower App Performance Insights



PUBG Mobile transformed the franchise into a global hit, surpassing 1.5 billion downloads since 2018. Its accessible design and constant updates extended the brand’s reach, introducing millions of new players and maintaining momentum across markets where PC adoption was limited.



Each major mobile update continues to drive synchronized spikes in both *PUBG Mobile* and *PUBG: Battlegrounds* on Steam. This demonstrates strong cross-platform synergy—mobile engagement sustains franchise visibility, while PC benefits from renewed interest, event-driven reactivation, and lasting community connection.

Adapted Experiences: Expanding IP Universes Through Mobile-First Innovation

Adapted experiences reimagine existing PC and console franchises for mobile audiences, offering new gameplay mechanics and monetization models. Unlike direct ports, these titles—such as [Fallout Shelter](#), [Final Fantasy Brave Exvius](#) and [The Elder Scrolls: Blades](#)—translate complex worlds into accessible, session-friendly mobile formats that reach broader audiences.

These adaptations drive incremental revenue without diluting the brand. They attract new player segments, especially in mobile-first regions, while keeping existing fans connected between major releases. Their success proves that premium IPs can evolve into scalable, long-term mobile ecosystems.

Beyond revenue, adapted experiences sustain franchise relevance and visibility. Continuous live events, themed collaborations, and cross-promotions strengthen community engagement, ensuring the IP remains active year-round. This model maximizes lifetime value while expanding the universe of beloved game worlds.

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



Fallout Shelter
Bethesda

[Fallout Shelter](#) reimagines Bethesda’s Fallout universe as a vault-management sim, successfully broadening franchise reach beyond its core RPG roots.



Release Date	June 2015
Genre	Simulation
Sub-Genre	Tycoon / Crafting
Product Model	Mid-Core
Setting	Historical
Theme	Post-Apocalypse
Art Style	2D Cartoon
Camera POV	Side
Monetization	Free to Play, Live Ops, Subscription, Ads, Currency Bundles, Starter Pack, Loot Box
Game Tags	Character Collection, Multi-platform, Resource Management



Final Fantasy Brave Exvius
Square Enix

[Final Fantasy Brave Exvius](#) builds a new mobile RPG experience with original storytelling and gacha systems, expanding the brand to a new generation of players.



Release Date	June 2016
Genre	RPG
Sub-Genre	Squad RPG
Product Model	Mid-Core
Setting	High Fantasy
Theme	Adventure
Art Style	Pixel
Camera POV	Side
Monetization	Free to Play, Live Ops, Season Pass, Gacha, Ads, Currency Bundles, Starter Pack, Loot Box
Game Tags	Character Collection, External Stores, Multi-platform, Narrative Stories, PvP, Social Clans



The Elder Scrolls: Blades
Bethesda

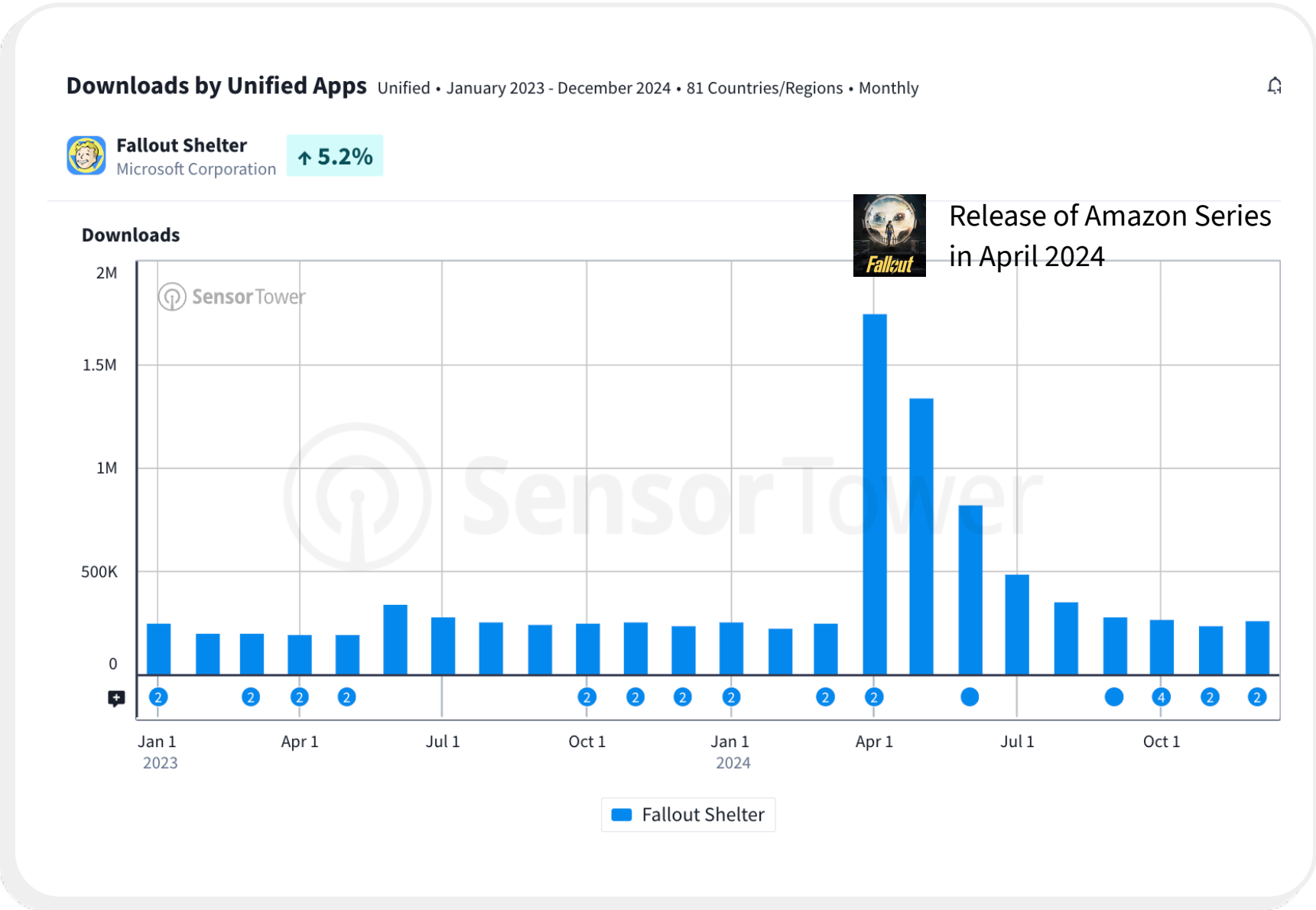
[The Elder Scrolls: Blades](#) adapts the open-world fantasy of Skyrim into a streamlined mobile dungeon crawler, showcasing how console IP can retain depth in shorter play sessions.



Release Date	June 2018
Genre	RPG
Sub-Genre	Open World Adventure
Product Model	Mid-Core
Setting	High Fantasy
Theme	Dungeon Crawler
Art Style	Stylized Realistic
Camera POV	First Person
Monetization	Free to Play, Live Ops, Currency Bundles, Starter Pack, Loot Box
Game Tags	Multi-platform, Narrative Stories, PvP, Social Clans

Fallout Shelter Surges with Amazon Series Hype, Standing Out as the Franchise’s Strategic Success

Source: Video Game Insights, Sensor Tower App Performance Insights



Following the release of the Fallout Amazon TV series in April 2024, *Fallout Shelter* downloads spiked sharply, rising over 5% year-over-year and reaching their highest levels since launch. The show’s success reignited interest across platforms, drawing both new and returning fans to the accessible mobile entry point of the franchise.

Fallout Games All Time Units Sold
PC and Console

#	Logo	Name	Available Platforms	Est. units sold	Avg. Playtime	Subgenre
1		Fallout 4	PS4, Xbox One, PC	59m	79h	Action RPG
2		Fallout 76	PS4, Xbox One, PC	26.1m	74h	Action RPG
3		Fallout Shelter	PS4, Xbox One, PC	22.9m	14h	Colony Sim
4		Fallout 3 - Game of the Year Edition	PS3, Xbox 360, PC	3.6m	18h	Action RPG
5		Fallout	PS3, Xbox 360, PC	1.3m	7h	Turn-Based RPG
6		Fallout: New Vegas PC	PS3, Xbox 360, PC	499k	64h	Action RPG
7		Fallout 3	PS3, Xbox 360, PC	8.3m	14h	Action RPG
8		Fallout: New Vegas	PS3, Xbox 360, PC	19.8m	46h	Action RPG
9		Fallout 4 VR	PS4, Xbox One, PC	331k	8h	Action RPG
10		Fallout 2	PS3, Xbox 360, PC	873k	15h	Turn-Based RPG

Unlike the core Fallout RPG titles, *Fallout Shelter* is the only strategy-simulation installment in the series—and it continues to perform strongly with over 22 million units sold across platforms. Its lighter, management-based gameplay has broadened the audience beyond traditional RPG fans, proving that the Fallout universe can thrive through genre diversification.

Cross-Play and Cross Progression: Building Unified Global Game Communities

Cross-platform titles deliver a seamless, identical experience across PC, console, and mobile—allowing users to play, progress, and socialize together. Games like [Roblox](#), [Genshin Impact](#) and [Delta Force](#) demonstrate how shared ecosystems sustain engagement by removing device barriers and unifying player progression.

These games maximize lifetime value by maintaining one global community and shared content roadmap. A single version across platforms reduces fragmentation, strengthens IP consistency, and enables synchronized live events that drive retention across audiences of varying play styles.

Though technically complex, the model delivers high strategic payoff. It creates franchise universes that thrive beyond any single platform, boosting long-term loyalty, cross-device monetization, and community-led growth—as seen in *Roblox*’s coordinated multiplayer and *Delta Force*’s global live-ops cadence.



Roblox
Roblox Corporation

[Roblox](#) operates as a cross-platform creation ecosystem, letting users build, play, and socialize seamlessly across PC, console, and mobile.



Release Date	May 2011
Genre	Simulation
Sub-Genre	Sandbox
Product Model	Mid-Core
Setting	Various
Theme	Dynamic
Art Style	Low Poly
Camera POV	Dynamic
Monetization	Free to Play, Live Ops, Subscription, Currency Bundles, Starter Pack
Game Tags	Co-op, External Stores, Multi-platform, PvP, User Generated Content



Genshin Impact
Mihoyo

[Genshin Impact](#) delivers a unified open-world RPG experience across PC, PlayStation, and mobile, maintaining identical gameplay and shared progression.

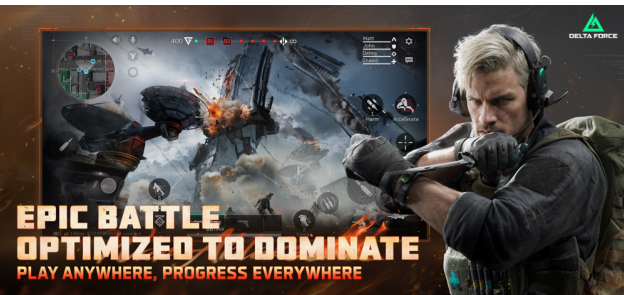


Release Date	September 2020
Genre	RPG
Sub-Genre	Open World Adventure
Product	Mid-Core
Setting	High Fantasy
Theme	Adventure
Art Style	3D Anime
Camera POV	Third Person
Monetization	Free to Play, Live Ops, Season Pass, Gacha, Subscription, Currency Bundles, Starter Pack, Loot Box
Game Tags	ACG, Character Collection, Co-op, External Stores, Multi-platform, Narrative Stories, PvP



Delta Force
Tencent

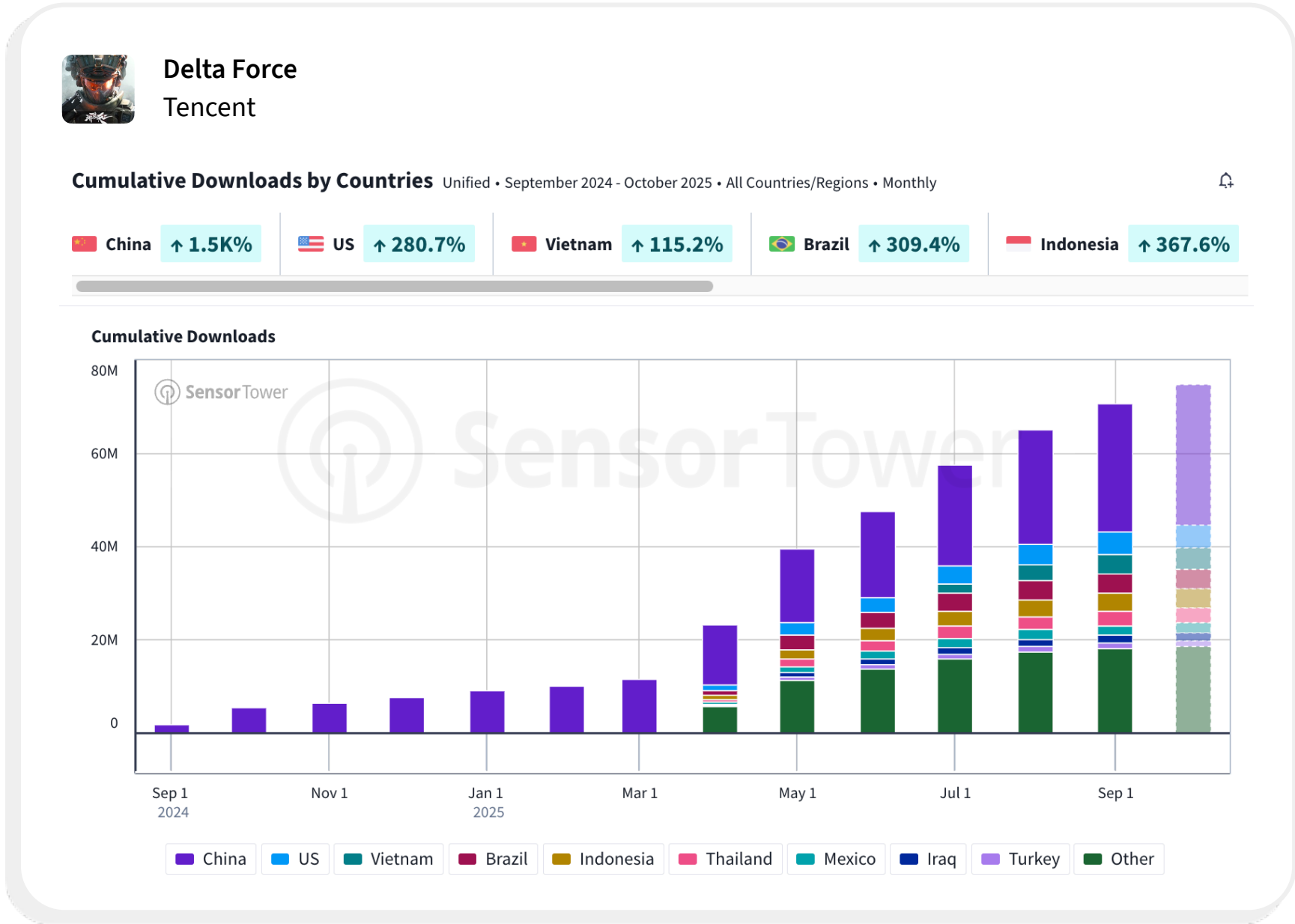
[Delta Force](#) supports cross-progression between Mobile, PC and consoles, reinforcing the game’s engagement through portability.



Release Date	April 2025
Genre	Shooter
Sub-Genre	FPS/ 3PS
Product Model	Mid-Core
Setting	Modern
Theme	Military
Art Style	3D Realistic
Camera POV	First Person
Monetization	Free to Play, Live Ops, Season Pass, Currency Bundles, Loot Box
Game Tags	Character Collection, Co-op, Multi-platform, PvP, Social Clans, User Generated Content

Delta Force’s Cross-Platform Launch Drives Global Growth and Unified Player Momentum

Source: Video Game Insights, Sensor Tower App Performance Insights as of October 24, 2025



Genre Strategy

Top Genres and Market Leaders in 2025



Leveraging Genre Strengths: Using Mobile Scale and PC Depth to Build Balanced Portfolios

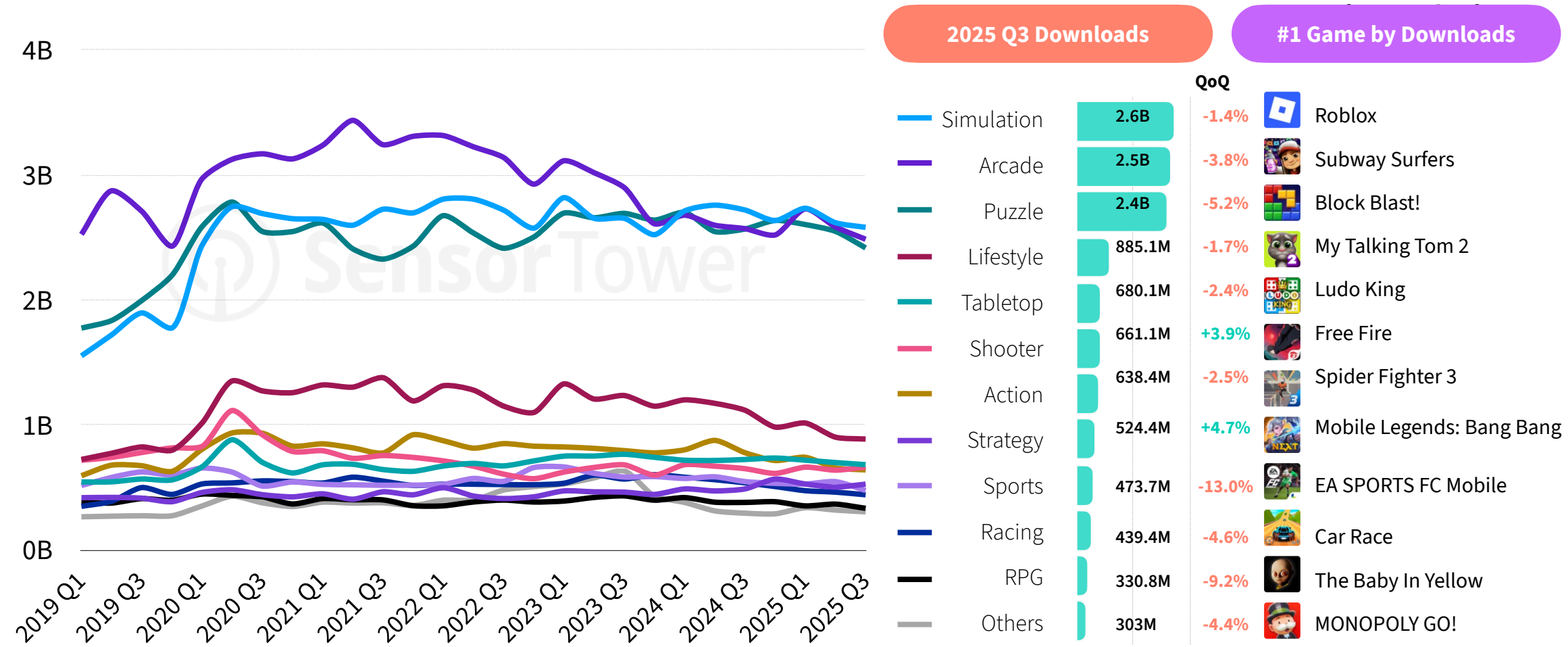
Mobile discovery is fueled by high-volume, accessible genres. Simulation, Arcade, and Puzzle titles lead in downloads worldwide, consistently exceeding 2 billion installs per quarter. These genres act as scalable entry points for user acquisition and franchise discovery.

In contrast, PC platforms emphasize depth. Action and Adventure lead Steam’s release activity, reflecting sustained demand for content-rich, premium experiences. These genres anchor long-term engagement and reinforce publisher prestige.

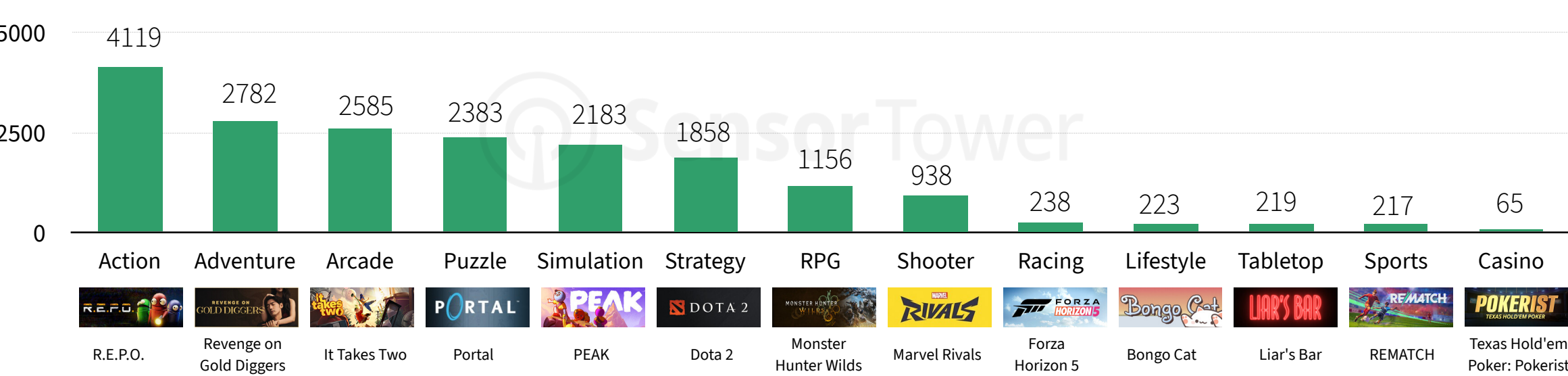
Publishers should align portfolio strategies with these strengths: use mobile-first genres to capture wide audiences efficiently, then channel that reach into PC and console genres that drive higher engagement and spending. Balancing mobile accessibility with PC depth can maximize discovery, retention, and franchise value.

Source: Video Game Insights, Sensor Tower App Performance Insights
Note: iOS and Google Play combined. iOS only for China. PC Games Downloads include free-to-play, games included as part of subscription services like Game Pass, as well as premium units sold.

Mobile Games (iOS & Google Play) Quarterly Downloads By Genre
2019 to 2025 Worldwide



Steam Number of Games Released By Genre Last 1 Year



Balancing Genre Revenue: Combining Mobile Scale with PC Depth

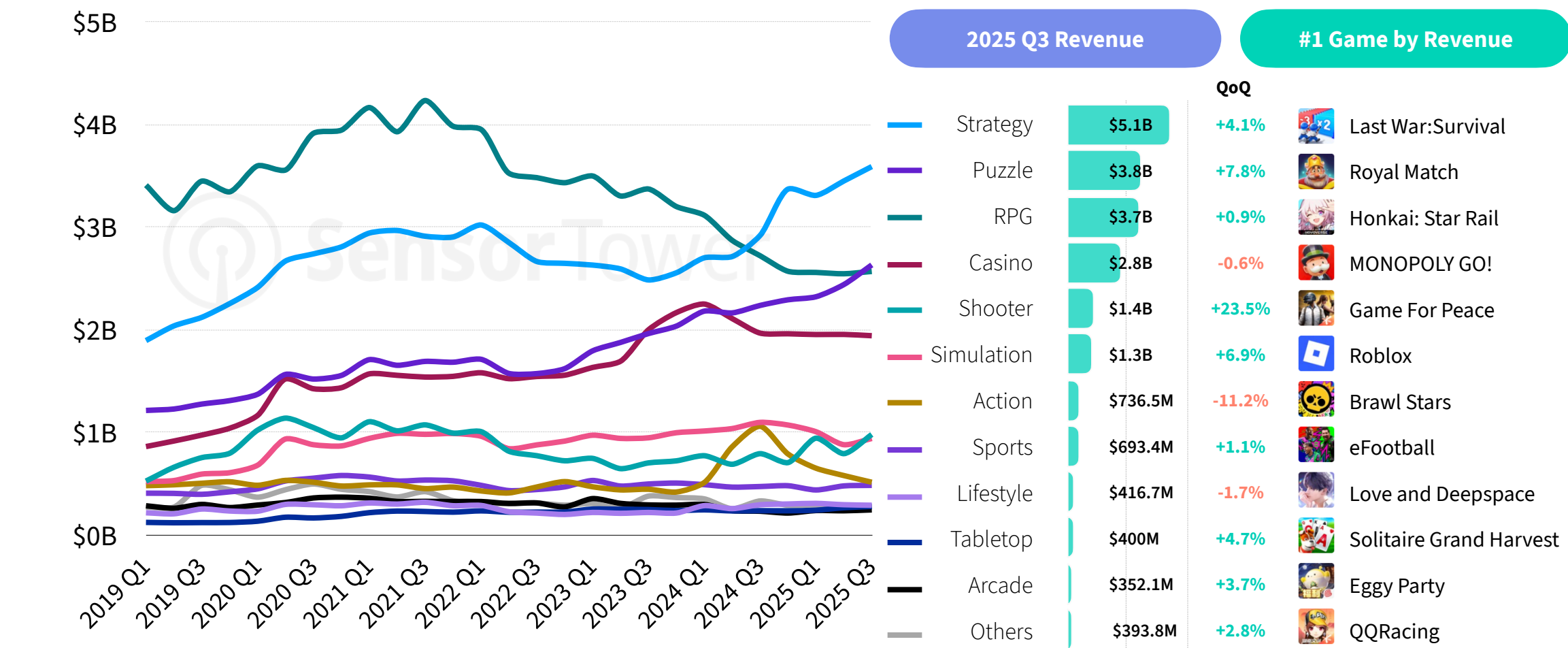
On mobile, Strategy, Puzzle, and RPG genres lead monetization, collectively generating over \$12B in quarterly IAP revenue. These genres deliver steady, long-term growth driven by live operations, progression loops, and high engagement.

On PC (Steam), RPGs and Shooters dominate average revenue per title, reflecting strong premium and DLC-driven ecosystems. Top genres like Tactical Shooters and MMORPGs deliver outsized returns per release despite lower overall volume, emphasizing quality over scale.

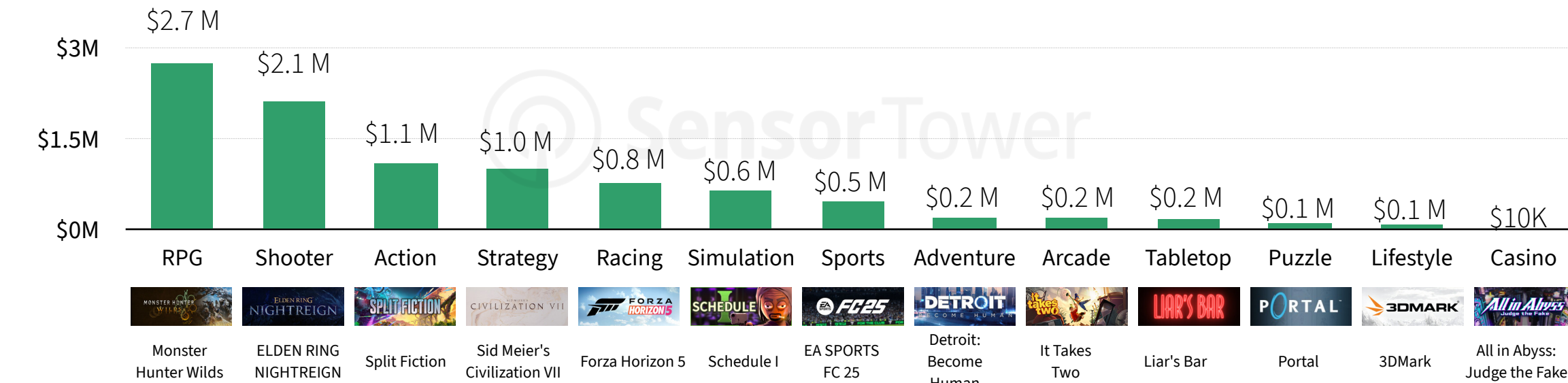
A balanced portfolio should leverage mobile’s consistent breadth with PC’s depth and monetization intensity. Publishers can use high-volume mobile genres for recurring revenue and community building, while relying on high-value PC releases to anchor profitability and reinforce franchise prestige.

Source: Video Game Insights, Sensor Tower App Performance Insights
Note: iOS and Google Play combined. iOS only for China. PC Revenue from Steam Only.

Mobile Games (iOS & Google Play) Quarterly Revenue By Genre
2019 to 2025 Worldwide



Steam Average Revenue Per Title By Genre Last 1 Year



Cross-Platform Genres Drive Longevity and Monetization Efficiency

Franchises spanning mobile and PC/Console ecosystems show greater resilience and monetization efficiency. RPGs and Shooters lead this shift, adapting seamlessly across premium and live-service models.

[Honkai: Star Rail](#) and *Genshin Impact* deliver identical progression across platforms, while *PUBG MOBILE* and [Call of Duty: Mobile](#) extend established IPs to mobile, supported by shared accounts and communities. These genres benefit from unified ecosystems that strengthen retention and lifetime value.

By contrast, Strategy games like [Last War: Survival](#) and [Whiteout Survival](#) remain mostly mobile-first, built for short sessions and lighter play patterns. Only select titles—such as [Honor of Kings](#) and [TFT: Teamfight Tactics](#)—are expanding cross-platform, signaling early adaptation.

Publishers can maximize longevity by investing in cross-platform adaptable genres, linking console-grade depth with mobile reach for sustained global engagement.



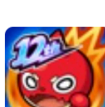


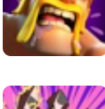
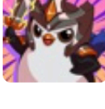
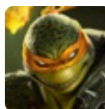
Source: Sensor Tower App Performance Insights
Note: iOS and Google Play combined. iOS only for China



2025 YTD Top 10 Mobile Games by IAP Revenue

Unified | Jan 1, 2025 - Sep 30, 2025

Cross Platform Lite Version Standalone Adaptation

RPG			Shooter			Strategy				
1		Honkai: Star Rail miHoYo		1		Game For Peace Tencent		1		Last War: Survival FUNFLY
2		Genshin Impact miHoYo		2		Garena Free Fire Garena Games Online		2		Whiteout Survival Century Games
3		Lineage M NCSOFT		3		PUBG MOBILE Tencent		3		Honor of Kings Tencent
4		Fate/Grand Order Sony Corporation		4		Call of Duty®: Mobile Microsoft Corporation		4		Pokémon TCG Pocket The Pokémon Company
5		Monster Strike mixi, Inc		5		Delta Force Tencent		5		Clash Royale Supercell
6		Dragon Ball Z Dokkan Battle BANDAI NAMCO		6		Cross Fire Tencent		6		Kingshot Century Games
7		Wuthering Waves Kuro		7		Knives Out NetEase		7		Clash of Clans Supercell
8		GODDESS OF VICTORY: NIKKE Tencent		8		War Robots Multiplayer Battles MyGames		8		TFT: Teamfight Tactics Tencent
9		RAID: Shadow Legends MTG		9		Arena Breakout Tencent		9		Evony Top Games
10		Fantasy Westward Journey NetEase		10		Battlegrounds India Krafton		10		Dark War Survival Florere Game

Cross-Platform Expansion: Unlocking the Mobile Potential of PC and Console Franchises

The 2025 charts show that most top PC and console titles remain platform-bound, while mobile franchises continue expanding upward.

RPGs and Shooters like *Clair Obscur: Expedition 33*, *Marvel Rivals*, and *Cyberpunk 2077* are standout hits, yet still lack mobile counterparts. Success stories such as *Delta Force*, *Call of Duty*, and *Fallout Shelter* demonstrate how franchises can achieve broader reach and sustained engagement when adapted for mobile play.

This gap presents a major opportunity—publishers can extend franchise lifecycles and capture new audiences by reimagining flagship IPs for mobile-first experiences.






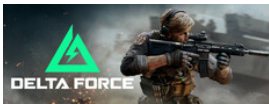




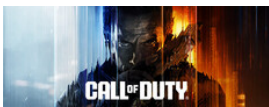
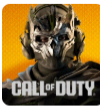


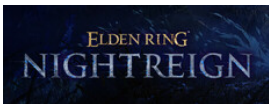


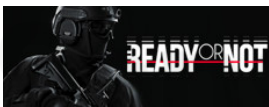



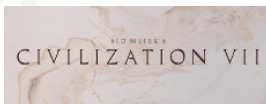





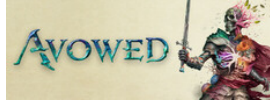









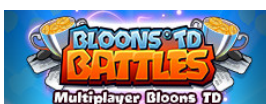
Source: Video Game Insights, Sensor Tower App Performance Insights
Note: iOS and Google Play combined. iOS only for China. Video Games Downloads include free-to-play, games included as part of subscription services like Game Pass, as well as premium units sold.



2025 YTD Top 10 PC/ Console Games By Units

Jan 1, 2025 - Sep 30, 2025

Cross Platform Lite Version Standalone Adaptation

RPG			Shooter			Strategy				
1		Monster Hunter Wilds		1		Marvel Rivals	1		Balatro	
2		Clair Obscur: Expedition 33		2		Delta Force		2		Bloons TD 6
3		The Elder Scrolls IV: Oblivion		3		Call of Duty®		3		Dota 2
4		Hogwarts Legacy		4		ELDEN RING NIGHTREIGN		4		Hearts of Iron IV
5		Cyberpunk 2077		5		Ready or Not		5		Stellaris
6		Kingdom Come: Deliverance II		6		HELLDIVERS™ 2		6		Sid Meier's Civilization VII
7		Borderlands® 4		7		DOOM: The Dark Ages		7		Fallout Shelter
8		Avowed		8		War Thunder		8		SMITE 2
9		WUCHANG: Fallen Feathers		9		Splitgate 2 Beta		9		Frostpunk
10		Diablo® IV		10		High On Life		10		Bloons TD Battles

Conclusion

1

Leverage Mobile as the Discovery Engine

Mobile remains the largest funnel for user acquisition, with 52B downloads and \$82B in IAP revenue yearly.

Games like *PUBG Mobile* demonstrate how premium PC/console IPs can reach global scale—over 1.5B downloads—while maintaining brand identity and serving as powerful discovery channels for the franchise.

2

Anchor Brand Equity with Premium PC/Console Experiences

Premium PC and console titles define franchise identity through depth, quality, and strong community engagement, driving major performance peaks from launches and live updates.

EA SPORTS FC exemplifies this balance—its top-selling console releases, supported by a unified Companion App, sustain player activity and reinforce brand loyalty year-round.

3

Bridge the Platforms with a Purpose-Built Strategy

Connecting ecosystems through companion apps, lite versions, or cross-play experiences enables seamless engagement across devices. Adapting platform-exclusive IPs into multi-platform formats remains a key growth opportunity.

Delta Force exemplifies this—its simultaneous mobile, PC, and console launch with shared progression strengthens retention and builds a unified global community.

4

Build a Resilient, Genre-Balanced Portfolio

Build resilience by balancing high-volume mobile genres with high-depth PC and console titles. Prioritize cross-platform adaptable genres such as RPGs and Strategy to maximize engagement, monetization, and longevity.

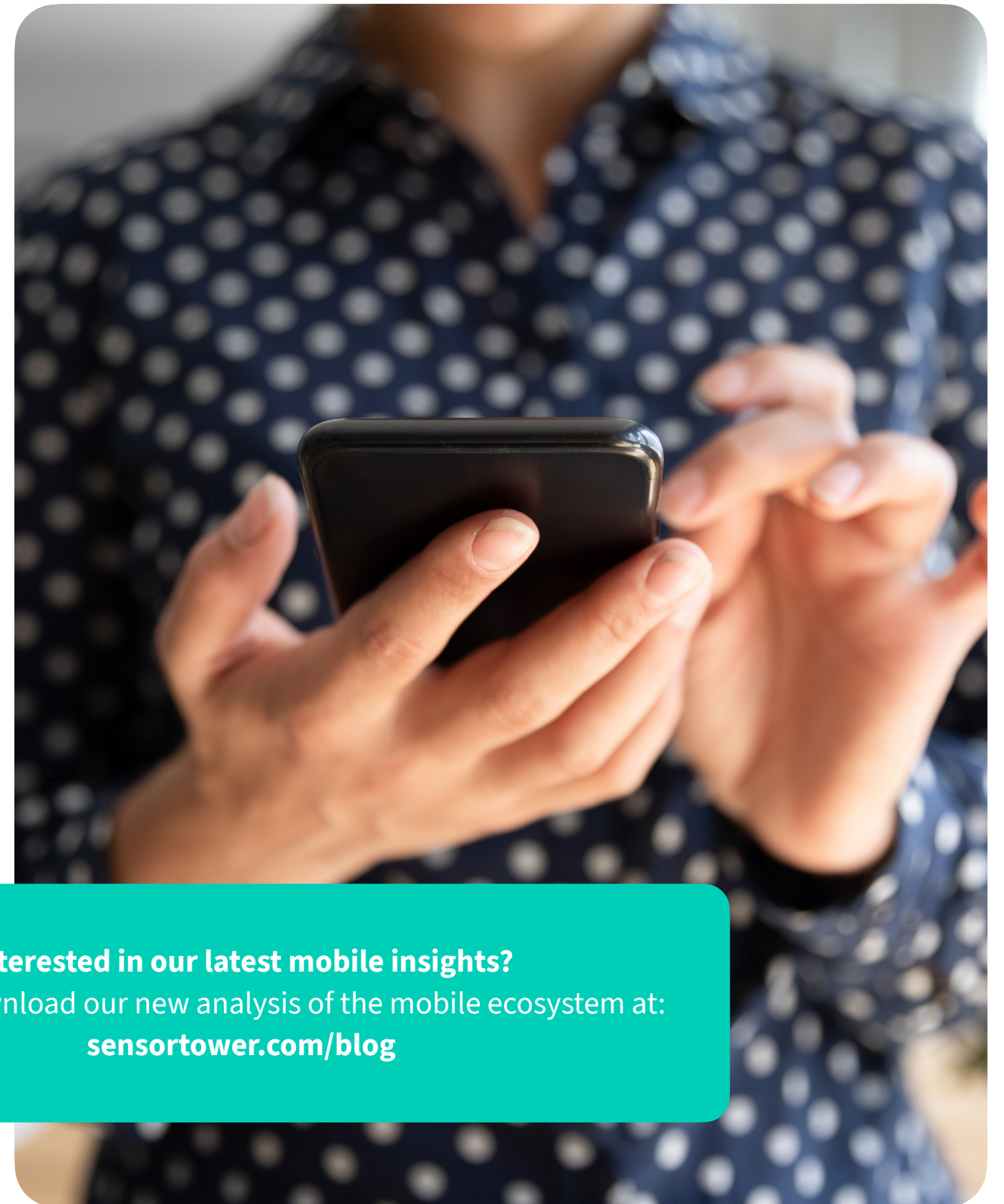
Fallout Shelter exemplifies this approach—expanding Bethesda's RPG universe into a mobile strategy format that attracted new audiences, extended franchise visibility, and maintained engagement between major console releases.

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APAC Insights Team

Author



Donny Kristianto
Principal Market Insights Manager
Singapore

Contributor



Hideyuki Tsuji
Insights Strategist
Tokyo

Contributor



Rui Ma
Senior Analyst, APAC
Hubei

Contributor



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Marketing Operations, APAC
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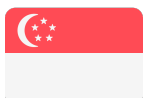
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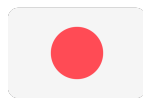
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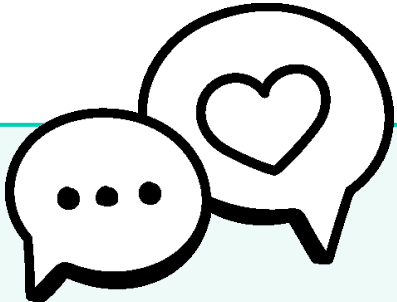


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Japan

Contact Info:
sensortower.com
sales@sensortower.com



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