



# LiveOps Report 2025



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# Our customers

We work with **350+** companies, including many big names:



# Methodology

This report is based on AppMagic data for the period of 2022 to 2025 for the global trends overview, and December 2024 to November 2025 for the LiveOps overview by segment, covering both Android and iOS platforms. The analysis of LiveOps events is based on the behavior of non-paying Android users in the United States.

## Key premises:

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### How is the market categorized?

All market analytics are based on AppMagic's core categorization.

[Click here to learn more](#)

### What is the basis for the market analytics data?

Estimates for downloads and revenue are derived from app positions in the Top Free and Top Grossing charts across all countries.

### How are the LiveOps events classified?

In the LiveOps sections, event types and app genre categorization are defined using the [LiveOps & Updates Calendar](#) tool and may differ from the app's main categorization.

This method highlights how live events are used across the market, providing more consistent and comparable insights across titles. You can find more details on the chart calculation methodology in the footer of each slide.

Data recorded on December 25, 2025

# Global LiveOps Trends

# Key takeaways

## Mobile games market growth is slowing down

Revenue growth fell sharply from +3.2% to +0.7%, while downloads growth also slowed down from +6.0% to +4.1%.

## Revenue remains concentrated in Midcore and legacy titles

Midcore titles make up 65% of top performers, while games released in 2015–2020 account for nearly half of the top-grossing revenue.

## LiveOps activity continues to intensify

The average number of LiveOps events increased from 73 to 89 per month, showing steady growth throughout the year with a seasonal peak in October.

## Collection mechanics dominate LiveOps events

Collection-based mechanics appear in nearly 80% of games, while Fishing and Expedition remain niche, each used in less than 20% of games.

## New event launches peak in spring

New event launches peak in March and April (0.8–0.9 per title per month) as teams focus on experimentation.

## Win Streak and Lava Quest drive competitive growth

Win Streak and Lava Quest grew the most (over 50%), driven by denser LiveOps schedules rather than new event types.

## Broader mechanics expand beyond Casual

Gacha, Expedition, and Album expanded into Midcore and Hybridcasual.

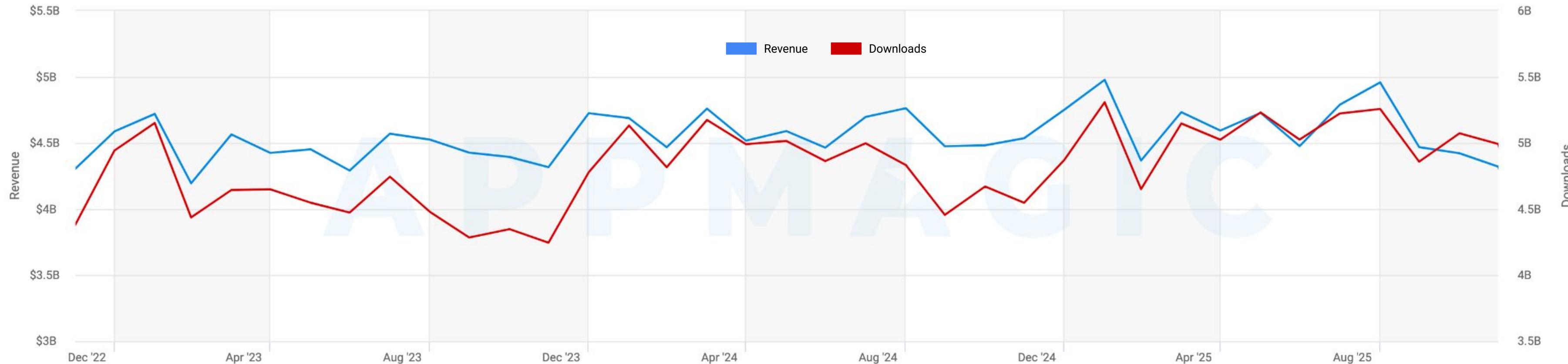
## LiveOps growth is not driven by holidays

LiveOps growth is not driven by holiday periods, despite their seasonal concentration.

# Yearly trend



## Trends in downloads and revenue for 2022–2025 (Worldwide)



The mobile games niche **has shown steady but slowing growth in both downloads and revenue over the past two years.**

**Downloads increased** by 6.0% last year, but their growth slowed to 4.1% in the most recent period. **Revenue growth has also decelerated significantly**, from +3.2% in 2024 to just +0.7% in the following year.

## Dynamics of change in downloads and revenue for 2022–2025 (YoY)

Period	Revenue	YoY change, %	Downloads	YoY change, %
Dec'22 – Nov'23	\$53.4B	-	54.9B	-
Dec'23 – Nov'24	\$55.1B	3.2	58.2B	6.0
Dec'24 – Nov'25	\$55.5B	0.7	60.6B	4.1

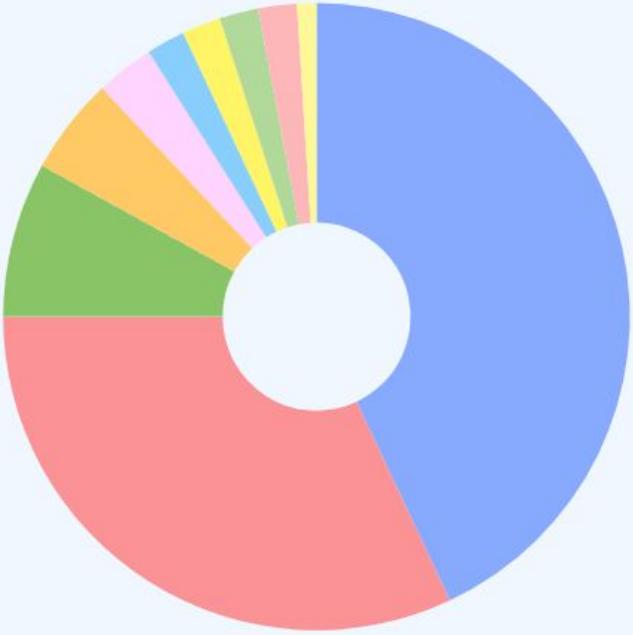


# Review of the 2025 top grossing

Between December 2024 and November 2025, the majority of top-performing games in the global market were distributed across three main niches: **Midcore (65%)**, **Casual (34%)**, and **Hypercasual (1%)**.

## Casual

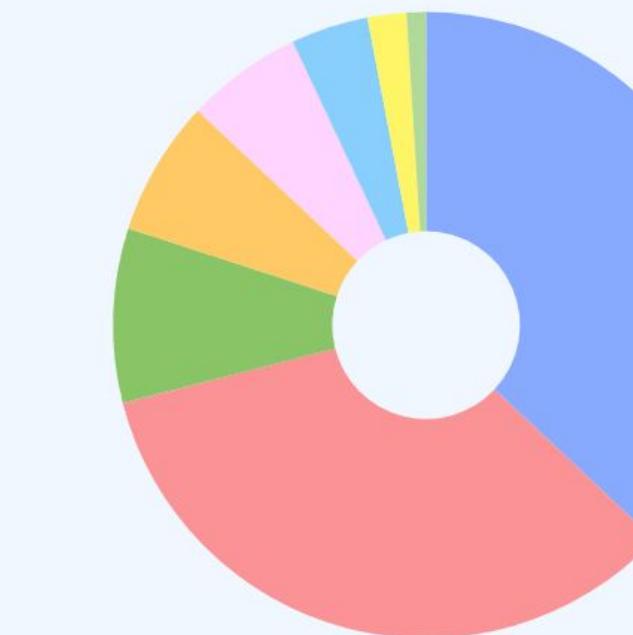
Legend: Casino (blue), Puzzle (red), Tabletop (green), Simulation (orange), Adventure (pink), Kids (light blue), Arcade (yellow), Sports Games (light green), RPG (pink), Party Games (yellow)



Among the top 100 Casual games, Casino accounted for 43% of revenue.

## Midcore

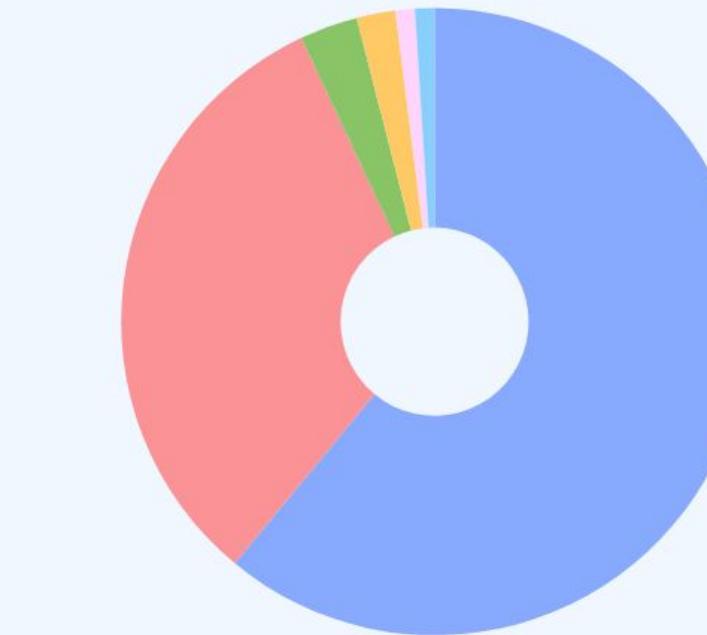
Legend: RPG (blue), Strategy (red), Shooter (green), Simulation (orange), Action (pink), Sports Games (light blue), Geolocation Games (yellow), Racing (light green)



Among the top 100 Midcore titles, RPG was the leading revenue generator with 37%.

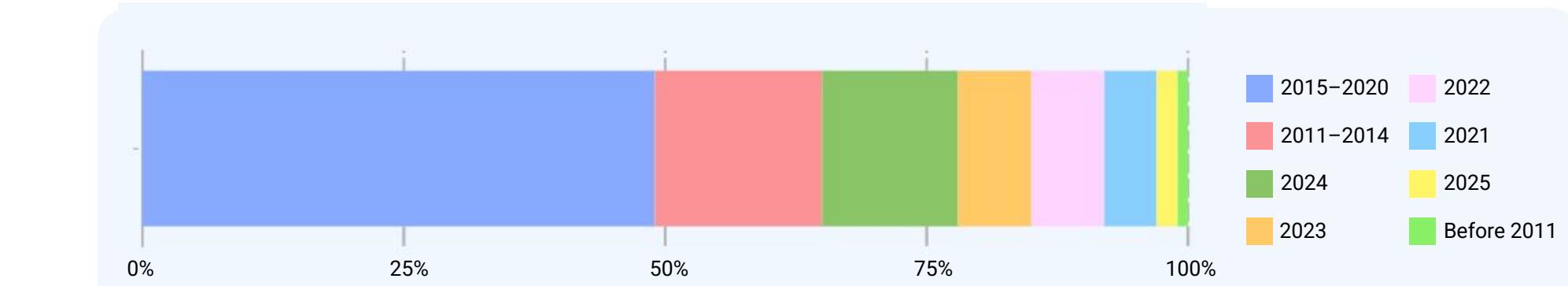
## Hypercasual

Legend: Puzzle (blue), Arcade (red), Action (green), Simulation (orange), Strategy (pink), Shooter (light blue)



Within the top 100 Hypercasual games, Puzzles earned 61% of revenue.

**Revenue continues to be heavily driven by older games:** titles released between 2015 and 2020 accounted for 49% of top-grossing games in the period, compared to just 22% from releases in 2023–2025, underscoring the sustained strength of long-established titles.



# Changes in event activity

Since the beginning of the year, the number of LiveOps events has continued to grow: while early in the year, projects launched an average of 73 LiveOps events per month, by the end of the year, this figure came at as high as 89. The growth has been gradual: despite a peak in October (91 events per game per month) driven by holiday activity and the return of LiveOps from the “quiet season,” the trend remains stable at the moment—and upward in the year-over-year perspective.

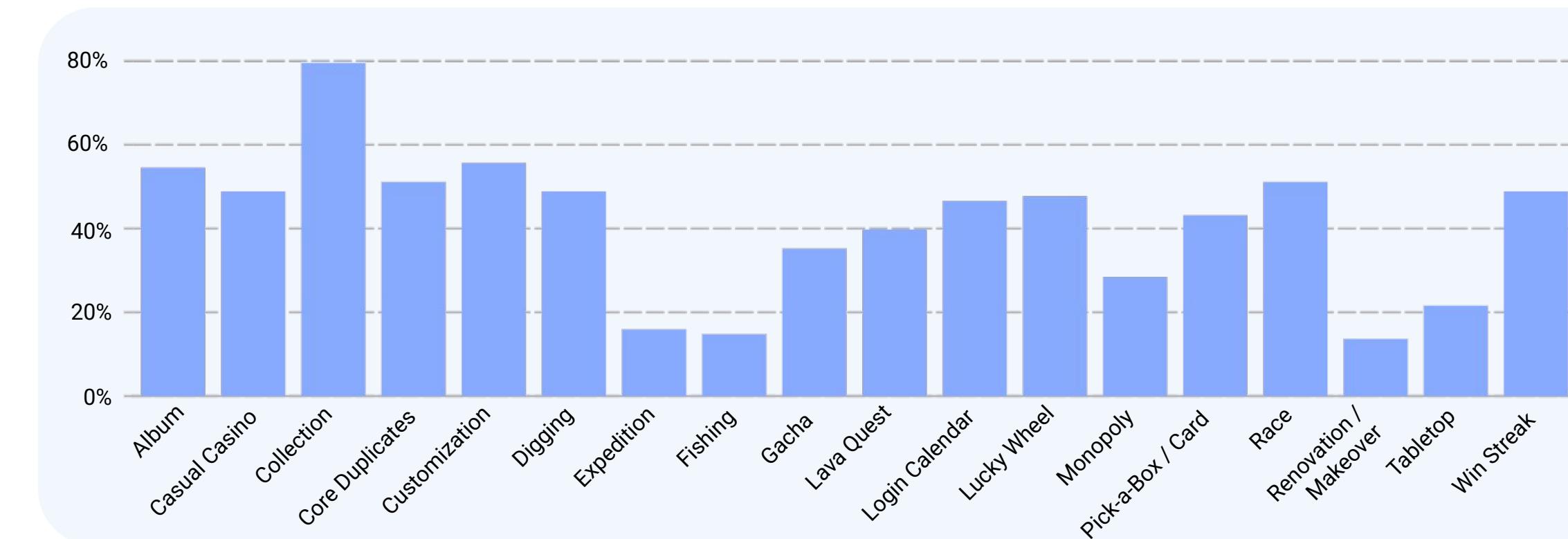
The increase in event density has also affected the prevalence of different mechanics within them. **The most popular mechanic featured in events is Collection**, which is present in almost 80% of all analyzed games. **Mechanics related to collecting and gathering elements have also become especially popular**, such as Album and Customization.

On average, the least popular mechanics are Fishing and Expedition, with their presence across games accounting for less than 20%.

The average number of LiveOps event launches per game per month



Representation of mechanics in 2025



\*excluding events where mechanics are not listed

# New events

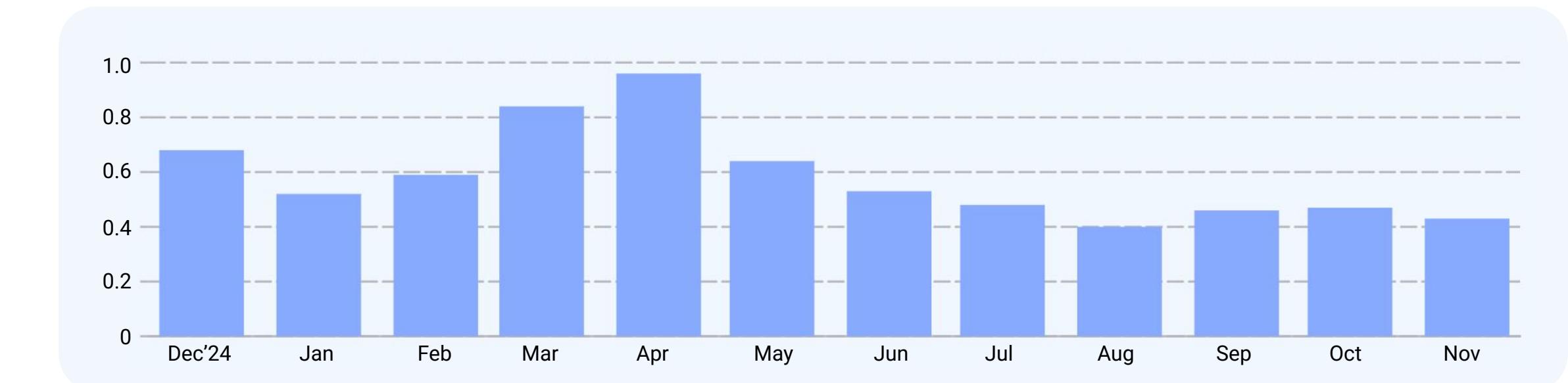
Despite the increase in holiday event activity during the fall and winter seasons, the **highest number of new events (0.8–0.9 per title per month) actually occurs in mid-spring**, namely March and April.

This approach can be explained by the need to rely on proven event formats during peak holiday seasons, while **spring serves as an ideal period for experimentation**. It allows teams to actively monetize an already acquired audience, while still having time before the traditionally “quiet” summer season.

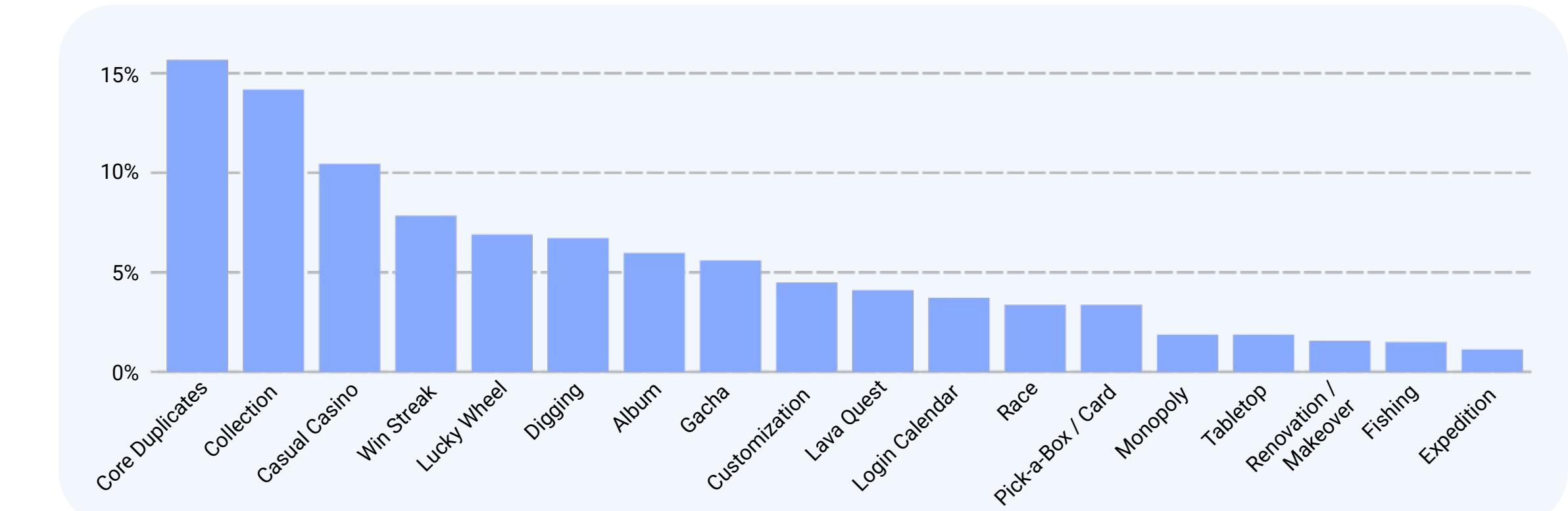
**Even newly introduced event types are often supported by well-established mechanics**, such as Core Duplicates (16% of cases) or Collection (14%).

**The least popular mechanics in new events are Expedition (1%) and Fishing (1%).**

## Monthly dynamics of new event releases per title



## Distribution of mechanics across new events\*



\*excluding events where mechanics are not listed



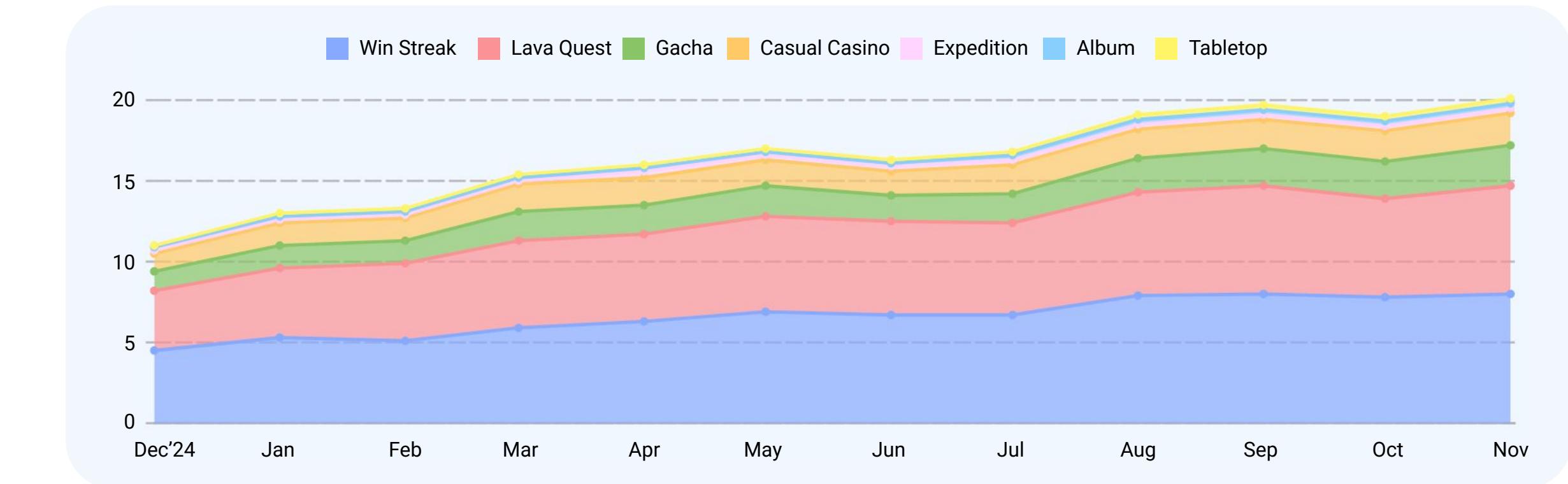
# Growing mechanics

Among popular mechanics, **the strongest growth was recorded in the competitive Win Streak and Lava Quest mechanics**, each increasing by over 50%. **This growth was driven primarily by higher LiveOps density within existing projects** rather than the introduction of fundamentally new event types. Despite the significant increase in launches, the adoption of these mechanics outside the Casual segment remains limited.

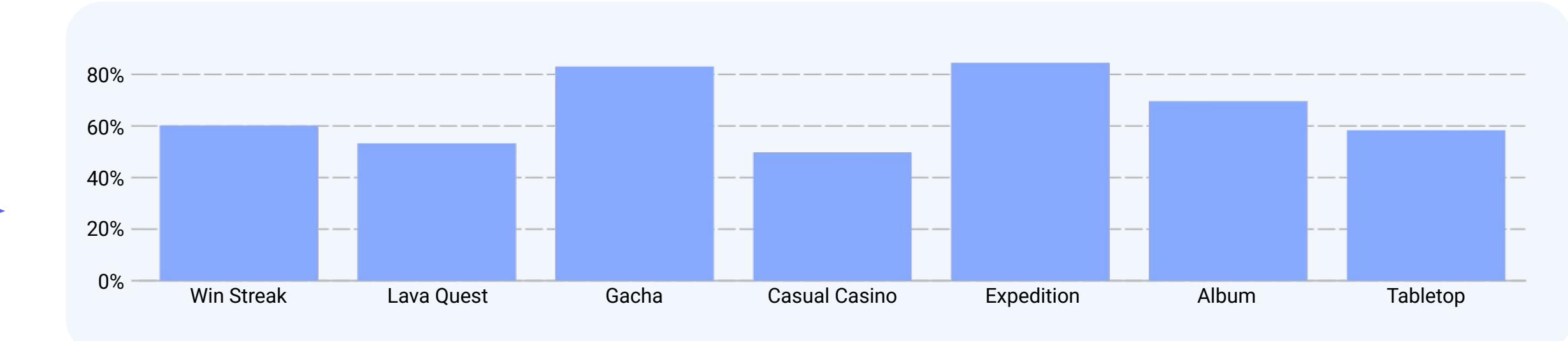
Among the less popular but more versatile mechanics, **Gacha, Expedition, and Album showed notable growth**, with their appearance frequency increasing to 70–85%. **This was largely driven by their expansion into Midcore and Hybridcasual segments.**

Casual Casino and Tabletop mechanics also gained traction, though mainly due to the denser LiveOps calendars in the Casino niche rather than broader adoption across other genres.

## Monthly dynamics of the fastest-growing mechanics per game



## The fastest-growing mechanics by number of launches per game, %





# Growing mechanics: Win Streak

The Win Streak mechanic is widely used across games, most commonly paired with Lava Quest, where players start simultaneously and must complete a set number of levels in a row on their first attempt, with the final reward shared between the finalists. This combination is most prevalent in Casual and Midcore games, but it has also become common in the Casino genre, for example, in [Bingo Bash: Live Bingo Games](#) during the [Jingle Trek](#) event.

In Midcore projects, Win Streak is often part of the more complex events that mirror core progression or introduce new gameplay. A notable example is [PUBG MOBILE](#) with its recurring [1v1 Popularity Battle](#), where Win Streak provides additional rewards.

## Games with Win Streak mechanics:



PUBG MOBILE



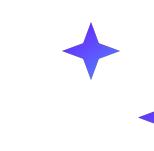
Pokémon TCG Pocket



Fishdom



Royal Match



Mechanic's presence:

48%

YoY growth:

60%

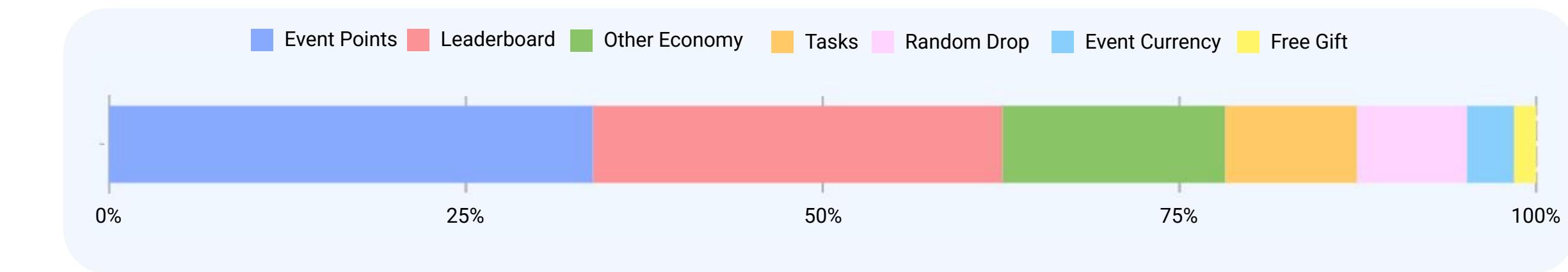
# Economy & monetization

**Most limited-time events are accessible to different player segments, including both paying and non-paying users.** However, the vast majority of events, nearly 70%, are primarily focused on hardcore or paying players.

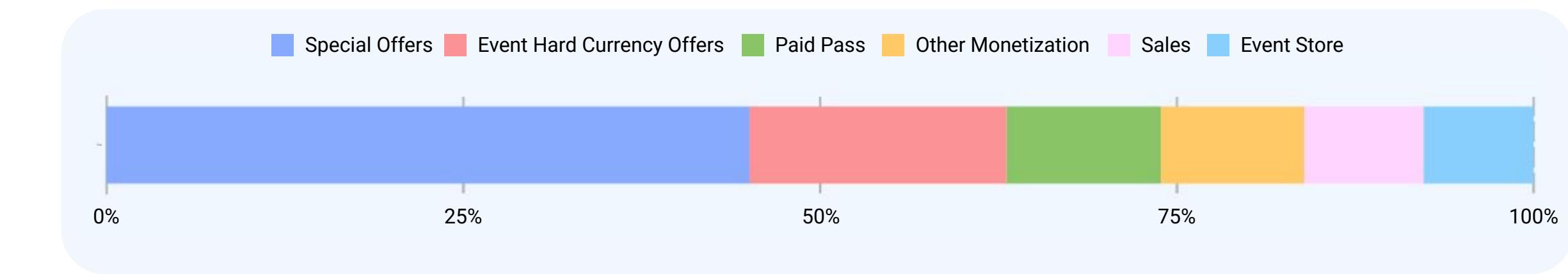
**The most common monetization elements are Leaderboard and Event Points.**

Conversion-focused mechanics within events, such as Free Gift, are also used. Toward the end of the year, their adoption increased, with Free Gifts appearing in events roughly 30% more often.

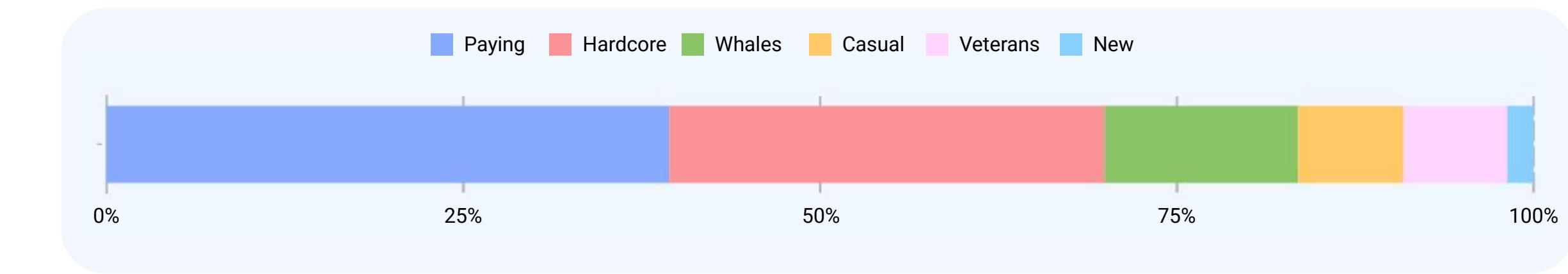
## By economy tag



## By monetization type



## By player type



# User motivation

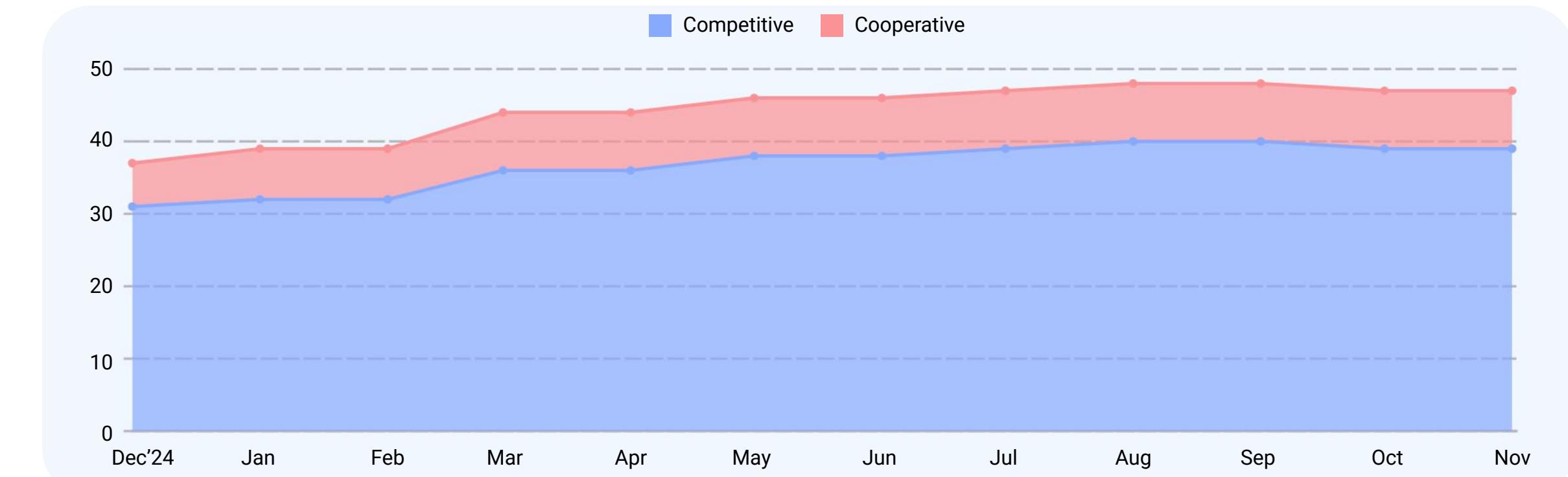
**Competitive events are the clear leaders among socially driven event types.**

**Compared to the beginning of the year, Competitive events have seen a 24% growth** and are increasingly used across all niches.

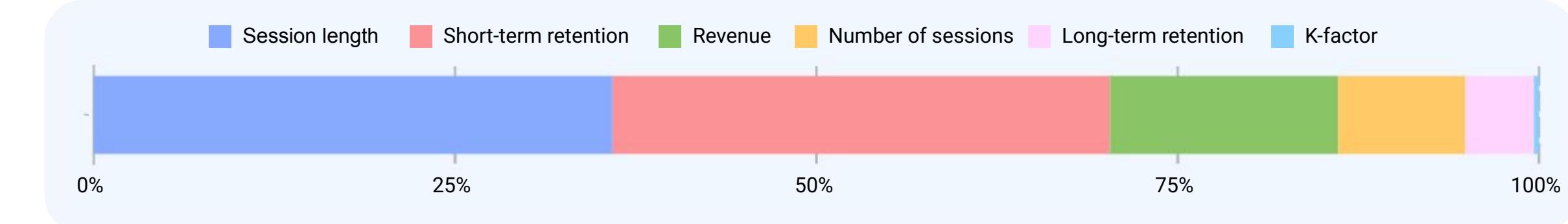
**The presence of Cooperative events in schedules is growing more moderately**, with a 17% increase this year.

Most events are primarily focused on Session Length and Short-term Retention, while Long-term Retention and K-Factor remain secondary drivers across all genres.

## By social motivation



## By goal



Want to learn more about your competitors' LiveOps? Explore our LiveOps & Updates Calendar for all the first-hand insights!

[Click here to learn more](#)

# Holidays

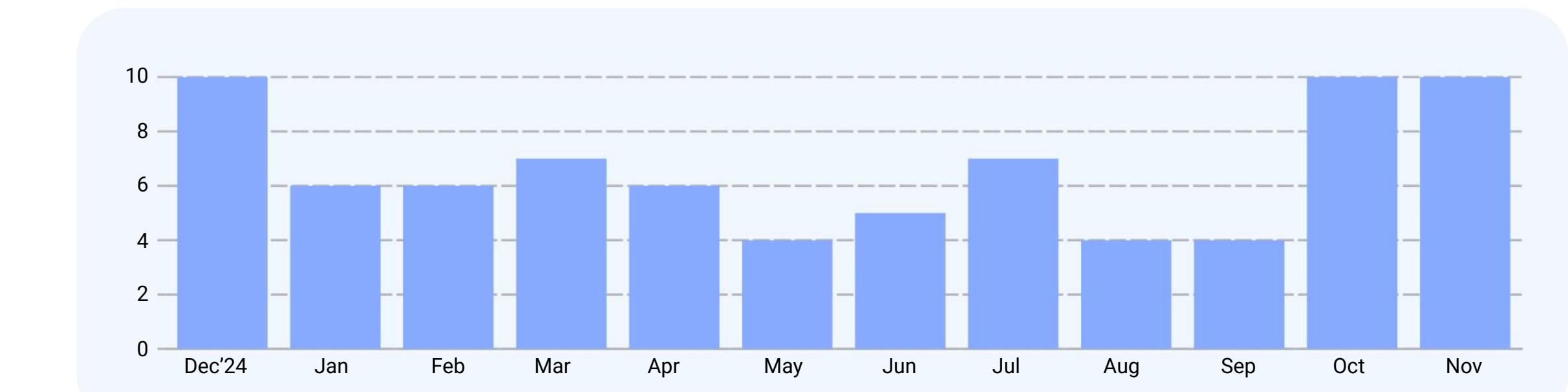
Despite the steady month-over-month increase in LiveOps event density observed over the past year, **this growth is not directly driven by holiday periods**. October, November, and December remain the most holiday-heavy months, driven by Halloween, Christmas, and New Year celebrations.

Check out our [Winter LiveOps research piece](#), where we explore popular event formats and how they are adapted for the winter holiday season.

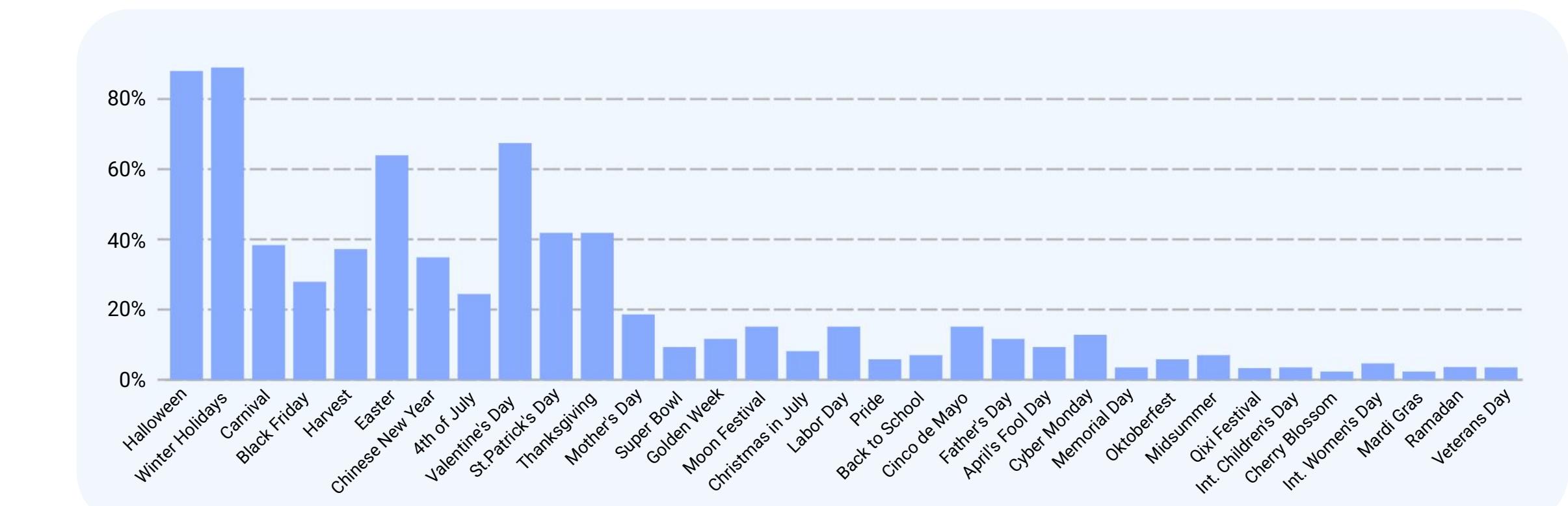
At the same time, **the average number of holiday-themed events per game during these months has remained largely unchanged**. For example, in December 2024, games launched an average of 10 themed events per title, a level that was also observed in November 2025.

**The most frequently used holiday themes continue to be Halloween, Christmas, and Valentine's Day.**

## Average number of holiday events per game



## Most popular holidays in mobile games



# Casual LiveOps Trends

# Casual

**Casual games are easy-to-play experiences with simple rules, short sessions, and low complexity, which makes them accessible to a broad audience.**



**Monopoly GO!**



**Travel Town**



**Royal Match**

# Key takeaways

## Casual downloads grow, revenue lags

Downloads grew from +6% to +7% year over year, while revenue slipped from +5.6% to -1%.

## Puzzle grows, Casino monetization weakens

Puzzle grows across revenue and downloads, while Casino gains users but loses revenue; other genres face decline.

## Casual LiveOps growth is seasonal

Event density grows by about 15%, driven by the fall and winter holidays.

## Digging drives growth, others remain niche

Digging is expanding the fastest, while Expedition remains niche; Win Streak and Album mechanics continue to evolve.

## Mechanic to watch: Stamps

Stamp events are expanding beyond the Casino, becoming a popular monetization-driven mechanic in Casual games.

## *Gossip Harbor* emerges as a new trendsetter

High LiveOps intensity and \$770M+ in revenue position *Gossip Harbor* as a new industry benchmark.

## Mechanic to watch: Puzzle

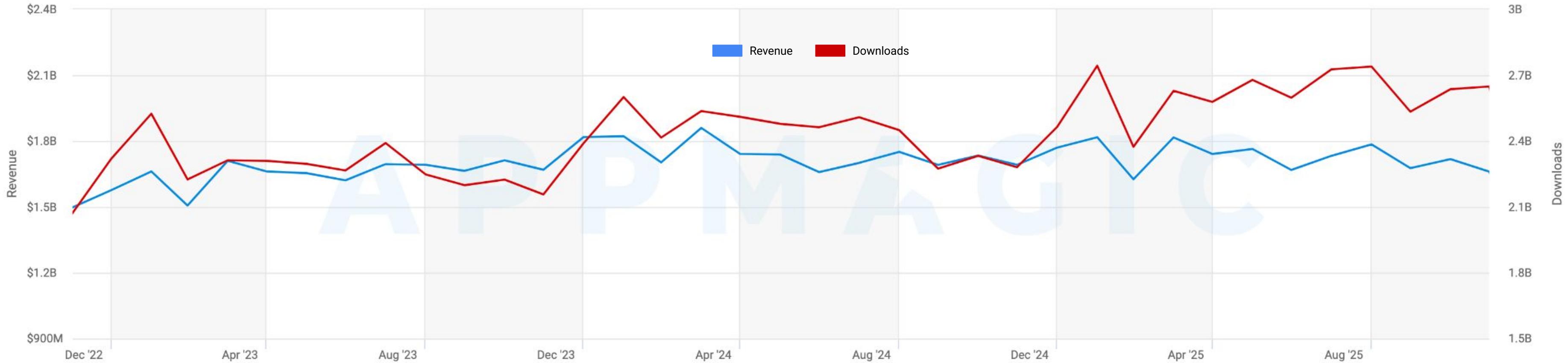
Puzzle collection is emerging as a lightweight alternative to Albums, integrated into core gameplay and monetized through event offers.

## Casual events target paying and hardcore users

Around 70% of events focus on payers and hardcore users, with monetization driven by event offers, hard currency, and paid passes.

# Yearly trend

## Trends in downloads and revenue for 2022–2025 (Worldwide)



Overall, the Casual segment **downloads have shown strong and accelerating growth year over year**, increasing by +6% and then by +7%.

**In contrast, revenue growth has been inconsistent.** It saw a moderate increase of +5.6%, followed by a slight decline of -1% in the most recent period.

## Dynamics of change in downloads and revenue for 2022–2025 (YoY)

Period	Revenue	YoY change, %	Downloads	YoY change, %
Dec'22 – Nov'23	\$19.8B	-	27.4B	-
Dec'23 – Nov'24	\$20.9B	5.6	29.2B	6.6
Dec'24 – Nov'25	\$20.7B	-1.0	31.3B	7.2

# Changes in the Casual subgenre

Puzzle, Casino, and Simulation remain the top 3 revenue-generating genres globally:

- **Puzzle showed solid revenue growth** (+8.1%) alongside strong downloads growth (+8.5%).
- **Casino revenue declined notably** (-7.7%) despite a significant increase in downloads (+11.8%).
- **Simulation experienced a slight revenue drop** (-4.5%) while downloads grew modestly (+5.1%).

Conversely, the **RPG and Shooter genres faced substantial declines** in both revenue and downloads. In addition to other major growing genres, **significant growth was also seen in Strategy**, with titles such as:



Tower Destiny Survive    Color Clash

Haunted Dorm

Genre	Rev Dec'23 - Nov'24	Rev Dec'24 - Nov'25	YoY change, %	Dls Dec'23 - Nov'24	Dls Dec'24 - Nov'25	YoY change, %
Action	\$87.1M	\$79.6M	-8.6%	3.1B	3.3B	4.5%
Adventure	\$577.2M	\$547.9M	-5.1%	771.4M	806.3M	4.5%
Arcade	\$457.0M	\$461.3M	1.0%	1.5B	1.6B	10.8%
Casino	\$7.6B	\$7.0B	-7.7%	1.5B	1.7B	11.8%
Game Collection	\$15,968	\$90,380	466%	186,929	774,772	314.5%
Geolocation Games	\$7,285	\$31,205	328.3%	122,261	138,660	13.4%
Kids	\$492.2M	\$548.7M	11.5%	4.7B	5.0B	7.2%
Party Games	\$349.1M	\$274.0M	-21.5%	847.8M	890.9M	5.1%
Puzzle	\$7.6B	\$8.2B	8.1%	7.0B	7.6B	8.5%
Racing	\$50.3M	\$54.6M	8.5%	1.9B	1.9B	4.5%
RPG	\$531.7M	\$431.2M	-18.9%	271.0M	253.4M	-6.5%
Shooter	\$3.8M	\$2.9M	-23.7%	132.4M	94.3M	-28.8%
Simulation	\$2.0B	\$1.9B	-4.5%	4.6B	4.9B	5.1%
Sports Games	\$285.0M	\$258.4M	-9.3%	869.5M	857.3M	-1.4%
Strategy	\$64.6M	\$102.9M	59.3%	123.1M	202.6M	64.5%
Tabletop	\$868.6M	\$934.1M	7.5%	1.9B	2.2B	14.9%

# Changes in event activity

The Casual segment largely follows the global trend in event launches, with minor deviations.

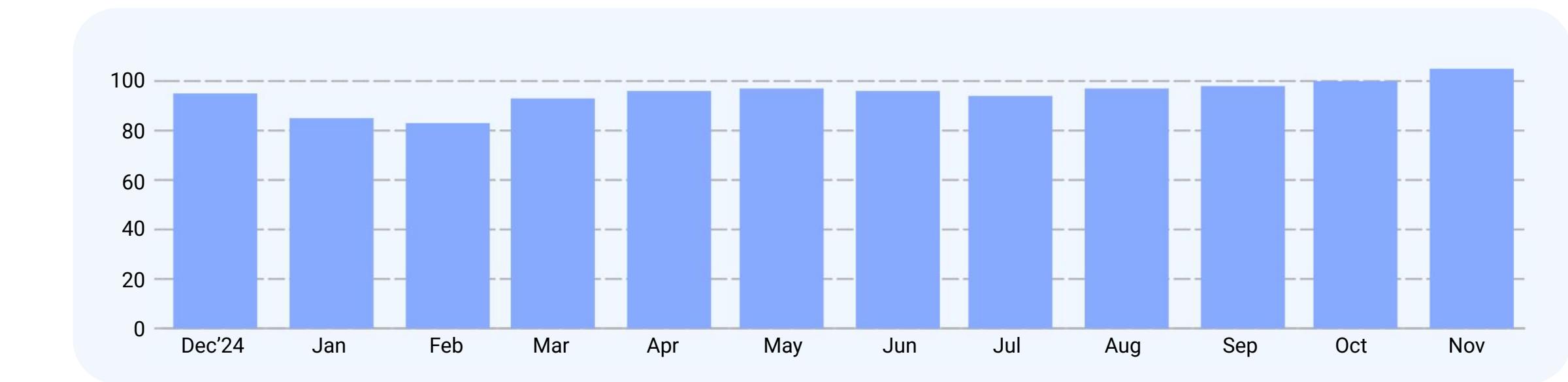
**Casual games deepen their schedules much more heavily around the fall and winter holidays compared to other niches**, while January and February show a more noticeable decline.

As a result, the **growth in event density is less pronounced**, averaging around 15% compared to the beginning of the year.

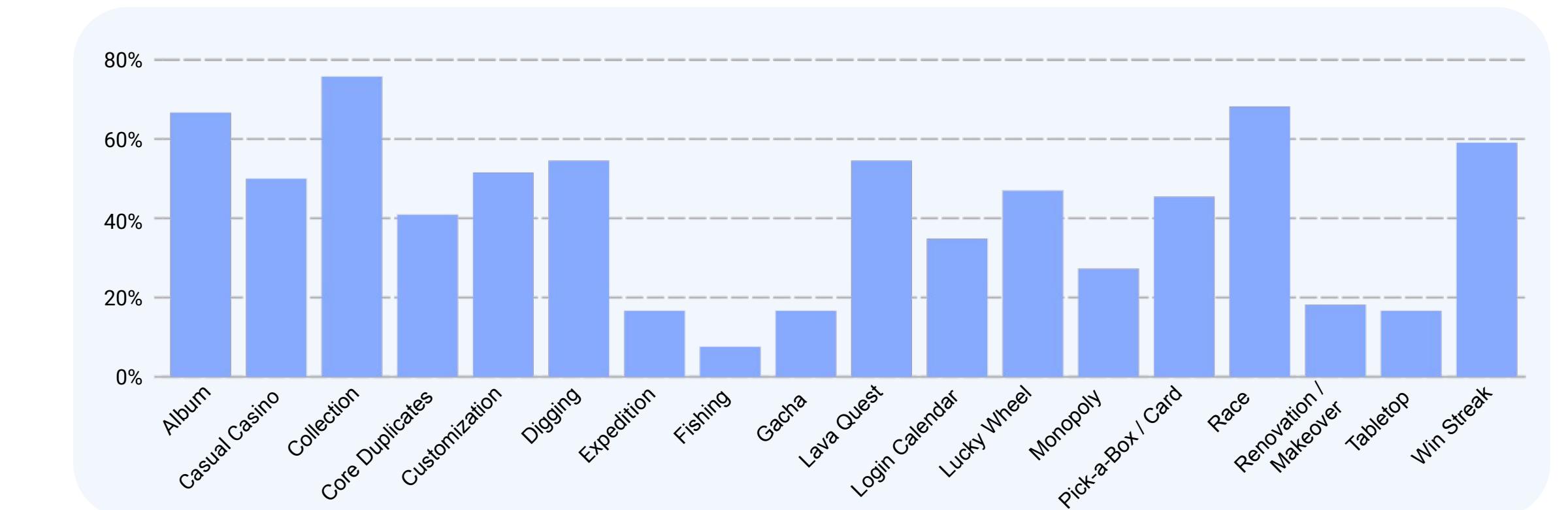
Collection (75%), Race (68%), and Album (66%) remain the most widely represented mechanics in Casual games.



**The average number of LiveOps event launches per game per month**



**Representation of mechanics in 2025**



**\*excluding events where mechanics are not listed**



# New events

The Casual segment is far more dependent on new event types than other segments, with developers regularly experimenting with mechanics.

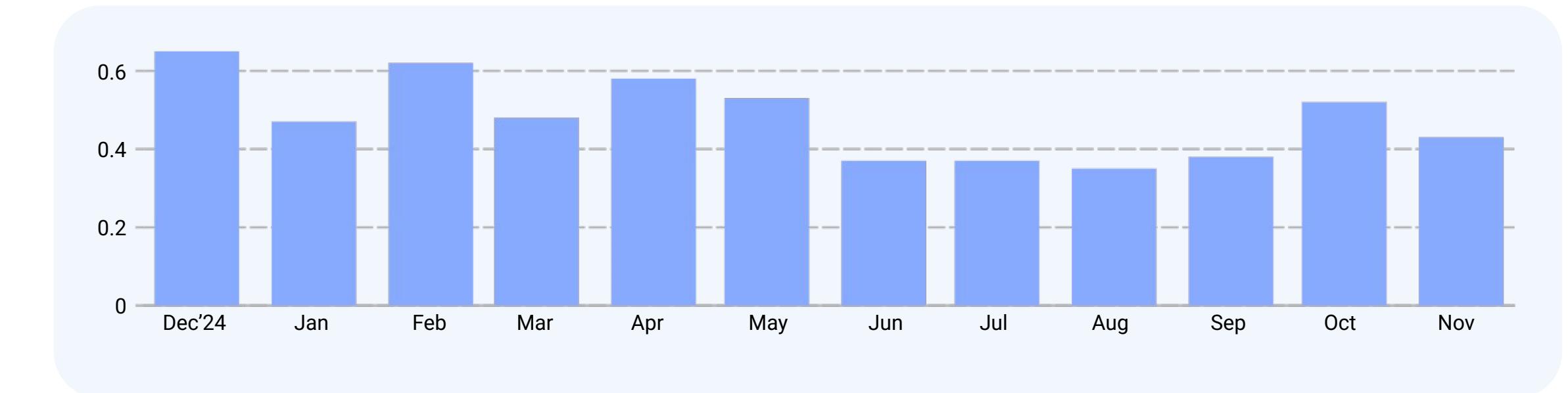
**As far as the new event releases go, Casual games maintain steady activity throughout most of the year**, with the exception of the summer season (June–September). The highest number of new events is observed in December (0.7 per game) and during the February–May period, which actively monetizes previously acquired users.

**Within the Casual segment, Casual Casino titles account for a significant share and largely drive the popularity of Casual Casino-type mechanics, currently the most widely used.**

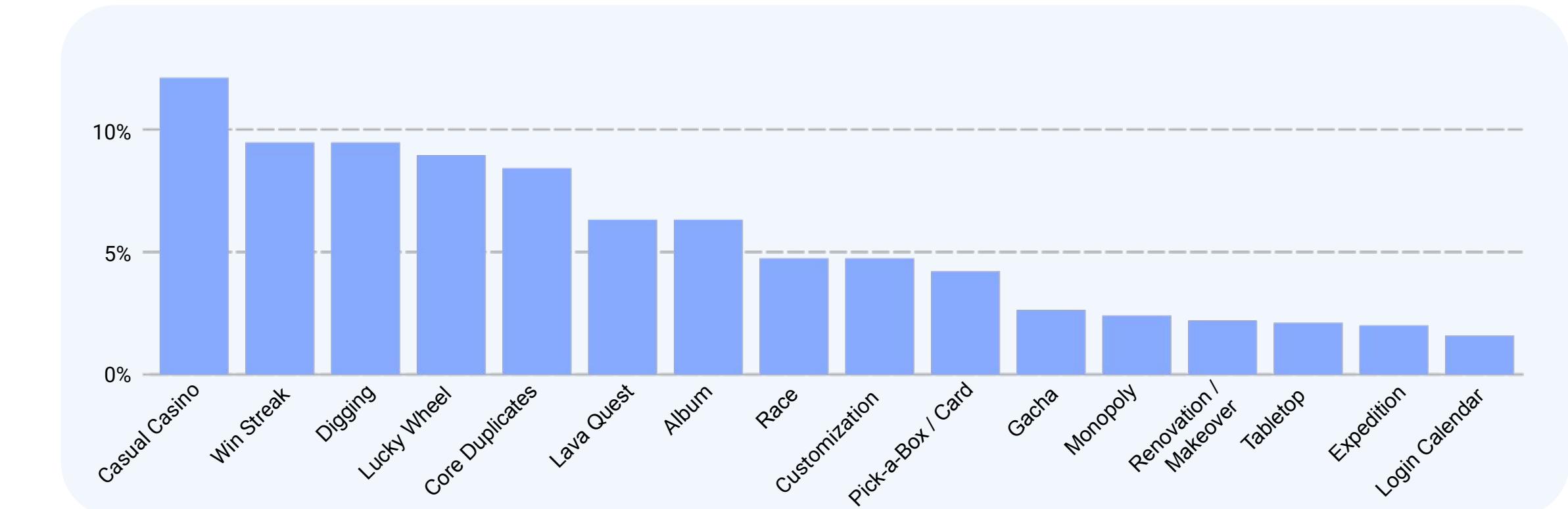
However, **excluding the Casino niche, Win Streak and Digging emerge as the most popular mechanics for new events this year**.



## Monthly dynamics of new event releases per title



## Distribution of mechanics across new events\*



\*excluding events where mechanics are not listed

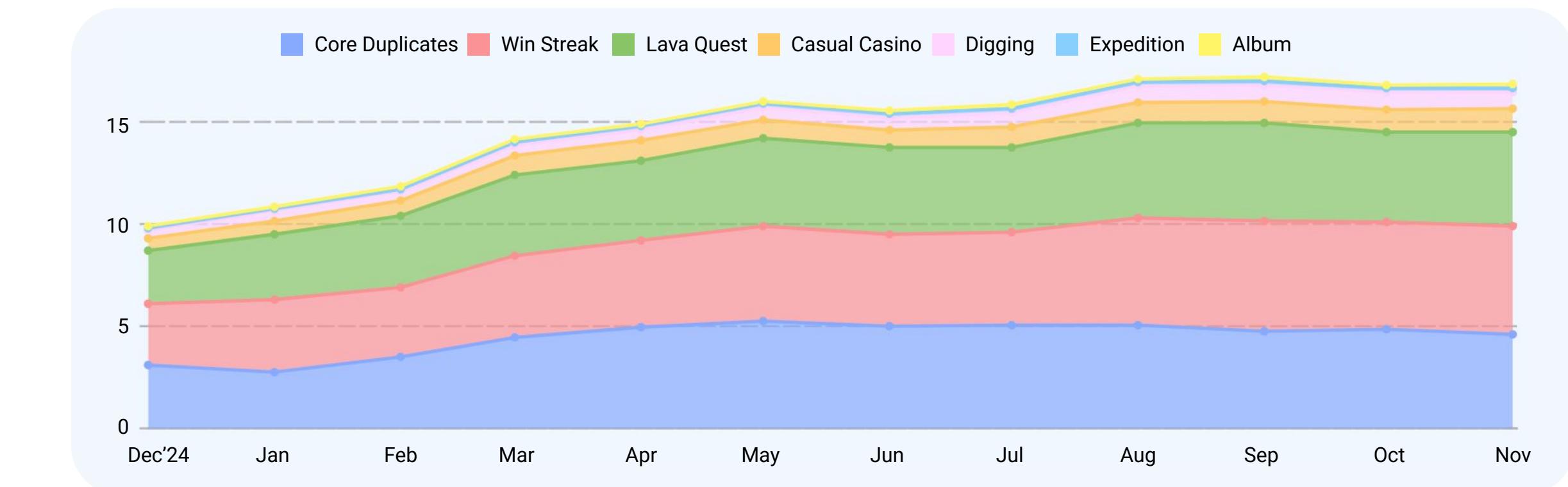
# Growing mechanics

Among popular mechanics, **the strongest growth in scheduling activity was recorded for Digging and Expedition mechanics, showing increases of 75–80%**. The Digging mechanic has been steadily gaining popularity for a long time, while Expedition only began to grow actively toward the end of the year. At the moment, it remains weakly represented in the Casual segment, used by less than 2% of all titles.

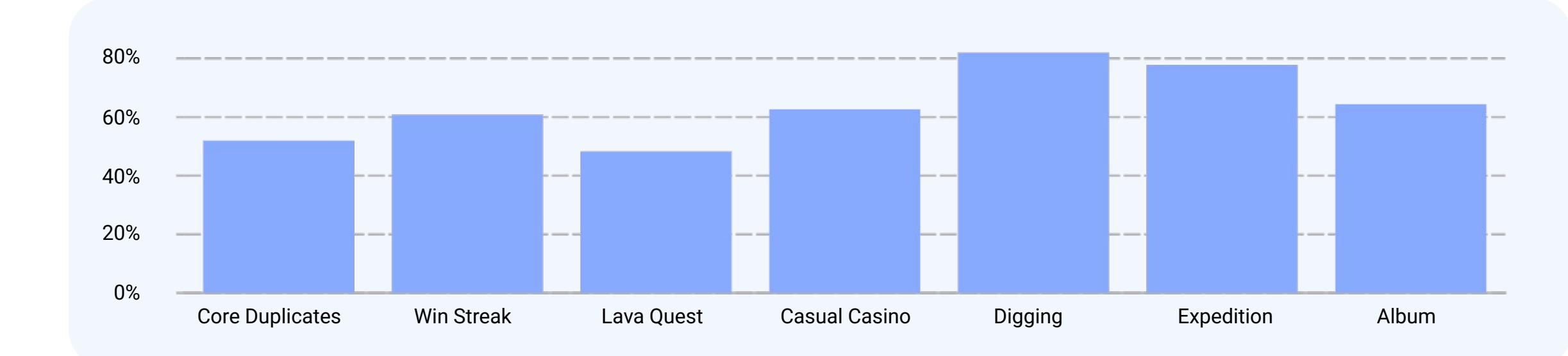
**Strong growth is also observed in the Win Streak and Lava Quest mechanics**, which are often implemented together in Casual games. However, Win Streak is also showing growth on its own and can regularly be seen as both standalone mode and part of events built around the Pick-a-Box mechanic.

**The Album mechanic also continues to evolve, gradually becoming more refined**. Short-term albums (lasting up to two weeks) are increasingly common, adding variety to the gameplay experience.

## Monthly dynamics of the fastest-growing mechanics per game



## The fastest-growing mechanics by number of launches per game, %





# Mechanic to watch: Stamps

Since last year, stamp-based events have been actively developing in the Casual segment. Most often, **Stamp events are directly tied to monetization**: players receive stamps for in-game actions or for making purchases. After completing a stamp card, players are rewarded with hard currency, soft currency, or collectible cards.

This type of event has been most widely adopted in **Casino games, as well as in Slots, Coin Looter, and related genres**. However, this year many well-known Casual titles, such as [Match Masters](#), [Travel Town – Merge Adventure](#), and [Family Island™ – Farming game](#), have also been actively using this mechanic.

## Games with Stamp mechanics:



Alice's Dream



Dice Dreams™



Solitaire Grand Harvest



Travel Town



Mechanic's presence:  
**24%**

YoY growth:  
**96%**

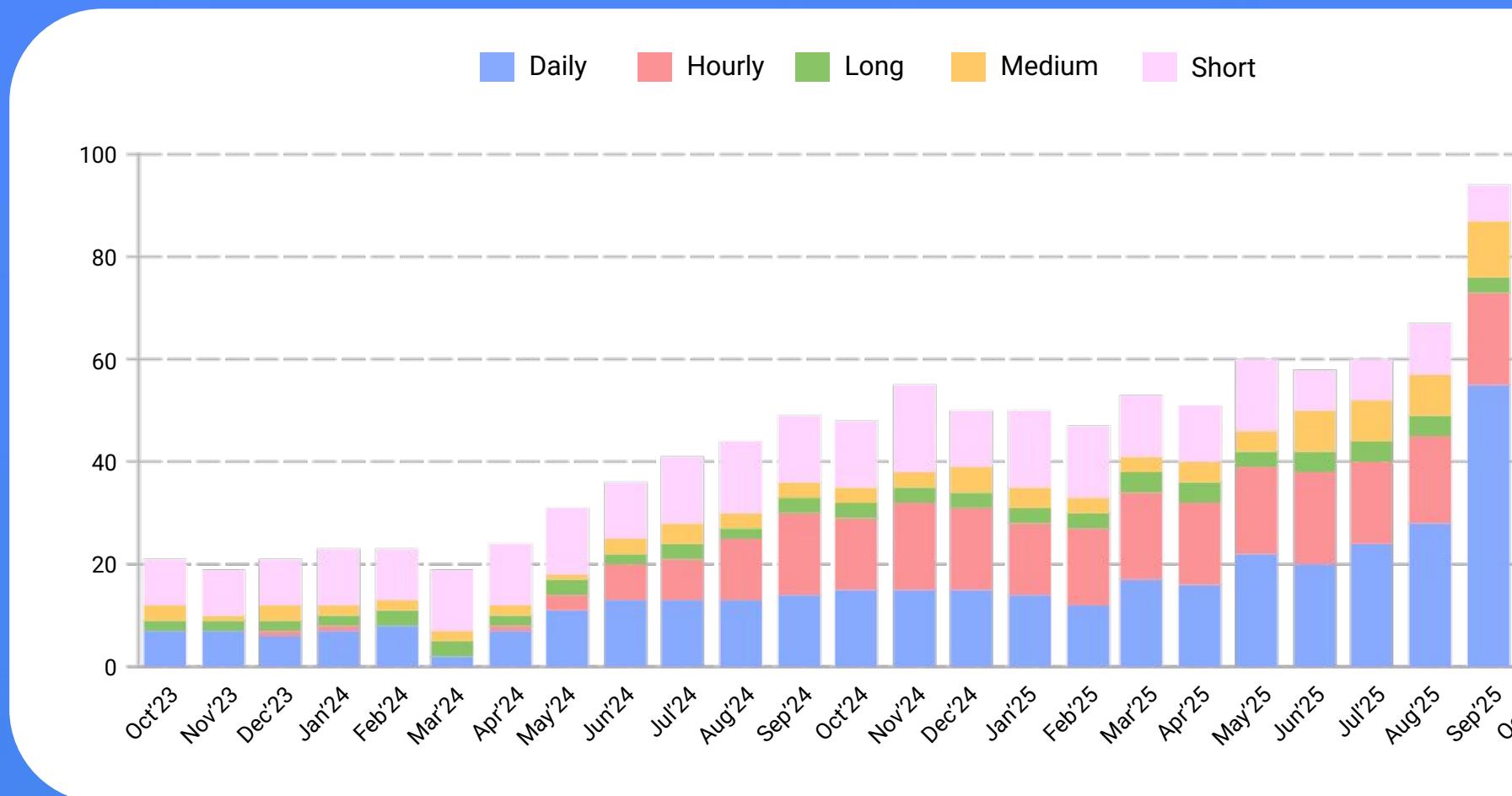
# Gossip Harbor is a new trendsetter



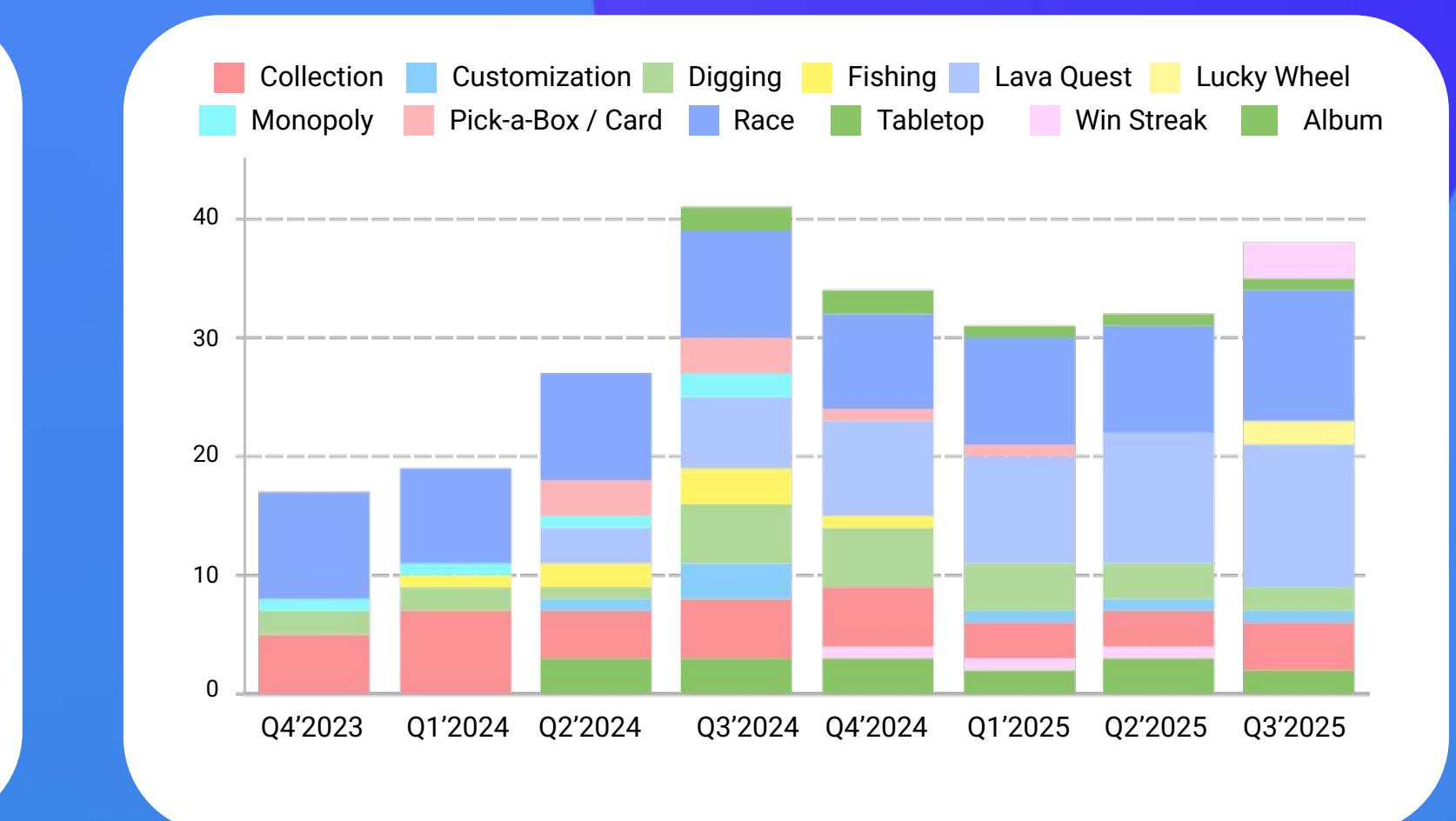
**Gossip Harbor** is the No. 1 Merge-2 title from Microfun Limited, launched in 2022. The game continues to grow year over year and has surpassed \$770 million in revenue. In 2025, it expanded its LiveOps activity sizeably, with nearly 100 monthly events in Q3 alone. While the title rarely introduces entirely new event types, its approach to iterating on existing events stands out. And you are welcome to explore its LiveOps in more detail in [our designated analytical piece](#).

Many top-grossing games have already begun adopting its LiveOps and monetization strategies, marking a shift away from [Royal Match](#) and [Monopoly GO!](#) as the main trendsetters.

Dynamics in the average number of monthly events



Dynamics in monthly event mechanic usage



# Mechanic to watch: Puzzle

While the Album mechanic has gained well-deserved popularity, it has also started to feel oversaturated for users. As a result, some **Casual games are trying to diversify their Collection mechanics**, and one such approach is **Puzzle collection**.

**Most often, collecting puzzle pieces is tied to the game's core activities.** During an event, players fill a progress bar with puzzles by completing levels or actively interacting with the game board (for example, in Merge titles). Each completed milestone unlocks one puzzle piece. When a player unlocks all the pieces, they receive the main reward for completing the event. **In most cases, event monetization is implemented through dedicated event offers.**

**Games with Puzzle mechanics:**



Disney  
Solitaire



Word Collect



Gossip Harbor



Angry Birds  
Dream Blast



**Mechanic's presence:**  
**18%**

**YoY growth:**  
**25%**



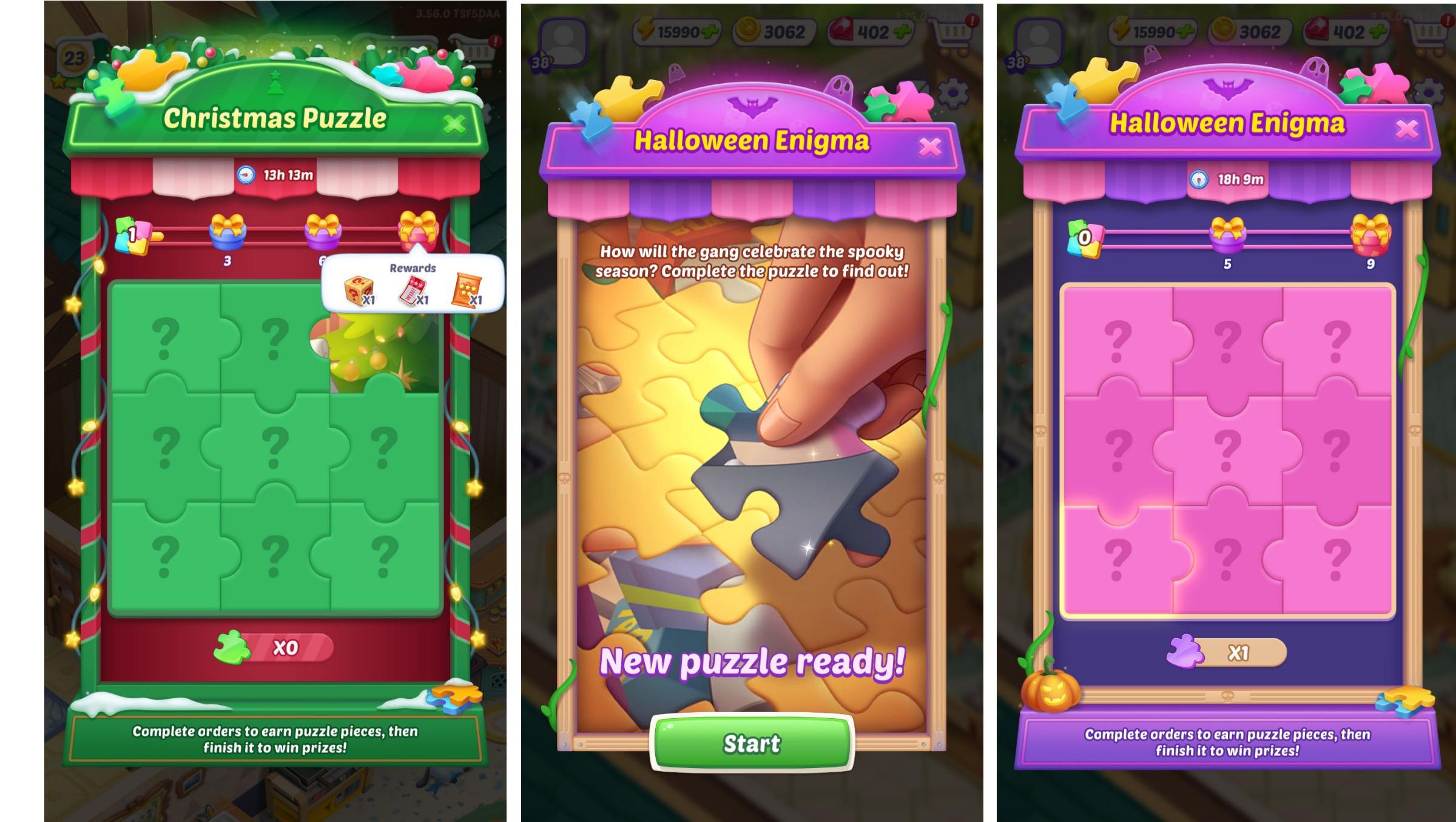
# Puzzle events in Gossip Harbor

**Gossip Harbor** was one of the first titles in the Merge niche to introduce Puzzle events back in November 2024.

By completing regular orders, players collect puzzle pieces to assemble a picture on the event screen. This fills a progress bar with milestones and rewards, such as energy, boosters, and card packs for the Album. Since its launch, the event has already run nine times.

Many of these events were tied to major holidays, including Christmas, Halloween, and the game's anniversary, as well as more general occasions, such as Spring and Fall festivals.

The event is primarily focused on short-term user engagement and increasing session length by deeply involving players in core gameplay activities.



Want to learn more about your competitors' LiveOps? Explore our LiveOps & Updates Calendar for all the first-hand insights!

[Click here to learn more](#)

# Economy & monetization

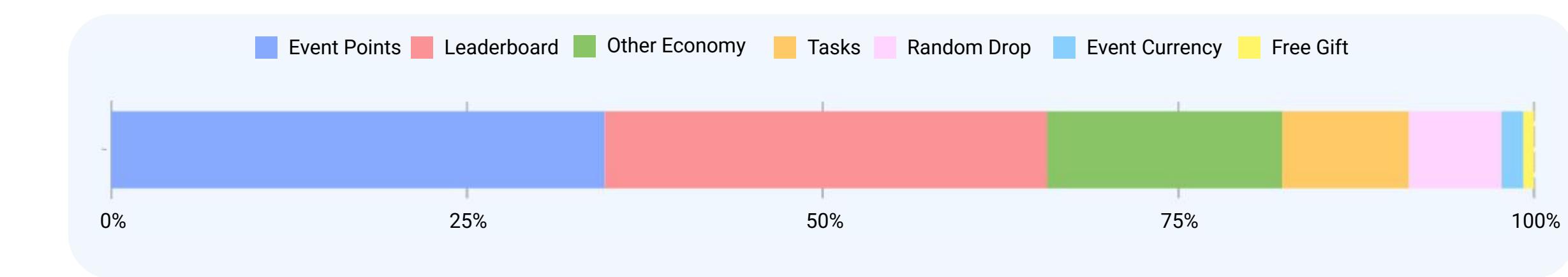
The primary **focus of Casual games**, in line with the broader global trend, is on paying and hardcore users, accounting for nearly 70% of events. In most cases, casual players can participate in these events, but time constraints and competitive mechanics such as Leaderboards often prevent them from collecting all of the rewards.

From an economy design perspective, the most popular solutions are **Event Points** and **Leaderboards** (almost 70%), while other economy elements, such as Event Currency, are used much less frequently.

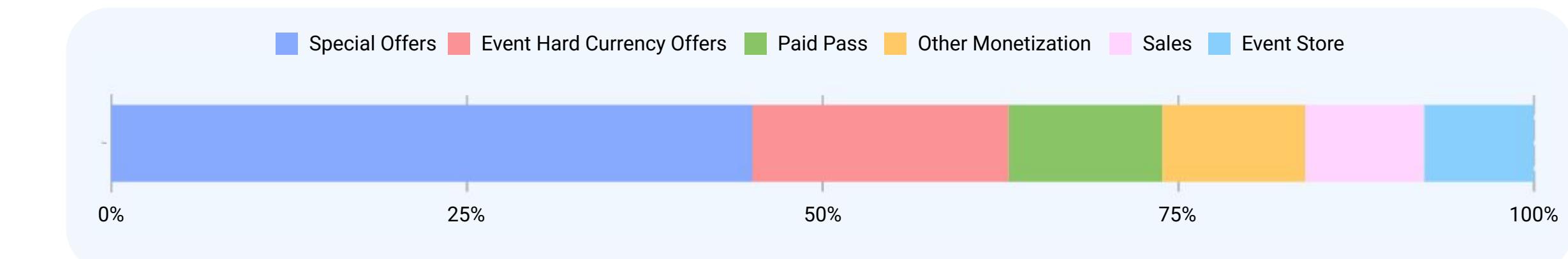
The majority of monetization comes from **Special Offers**, **Hard Currency**, and **Paid Passes**.



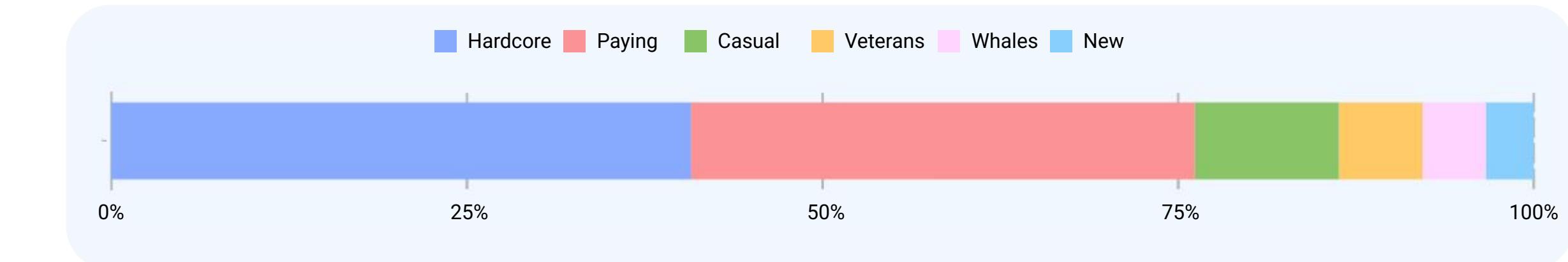
## By economy tag



## By monetization type



## By player type



# User motivation

The primary focus of Casual events is on competitive formats, often featuring Leaderboards, Race, and Lava Quest mechanics.

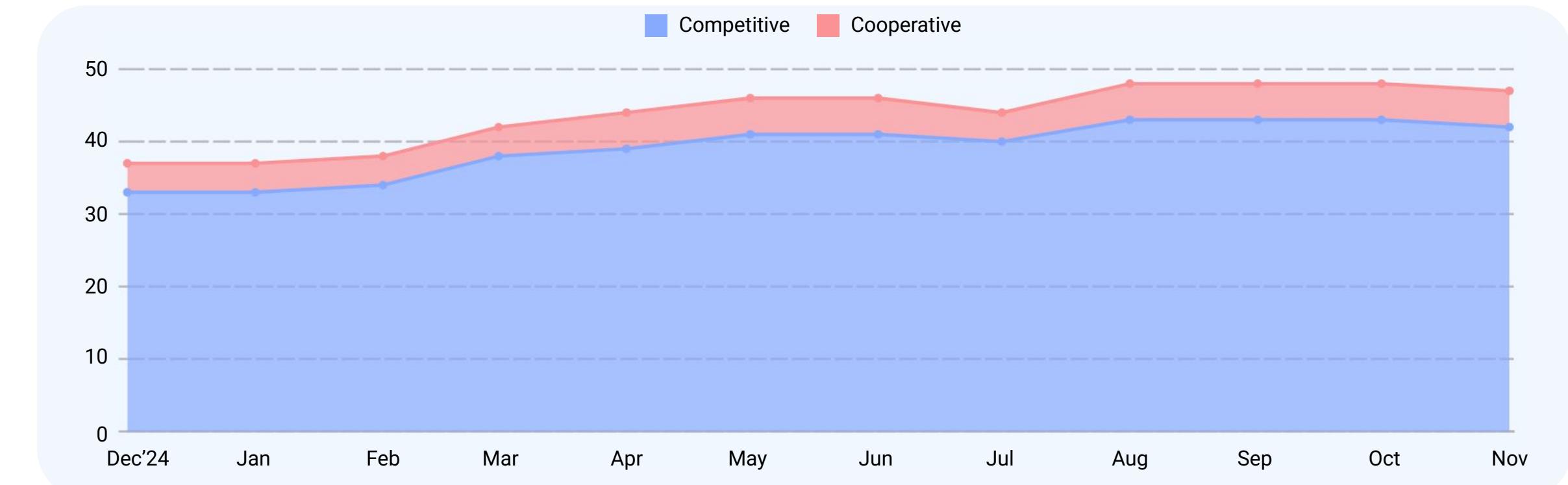
This year, a slight increase was also observed in Cooperative events, typically centered around gift exchanges or team/guild-based activities.

However, **the main growth continues to come from competition-driven events, which increased by 26% year over year.**

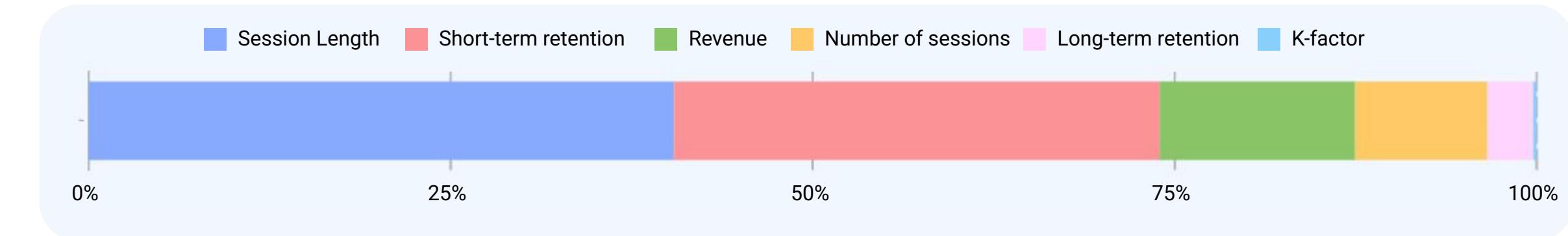
Overall, these events are primarily designed to boost Session Length and Short-term Retention, while Revenue and Long-term Retention remain secondary objectives.



## By social motivation



## By goal



Want to learn more about your competitors' LiveOps? Explore our LiveOps & Updates Calendar for all the first-hand insights!

[Click here to learn more](#)

# Holidays



**Casual games are significantly more dependent on local holidays than other genres.**

They often feature short, niche holidays that are rarely used elsewhere, such as Cyber Monday, Cinco de Mayo, or Mother's Day.

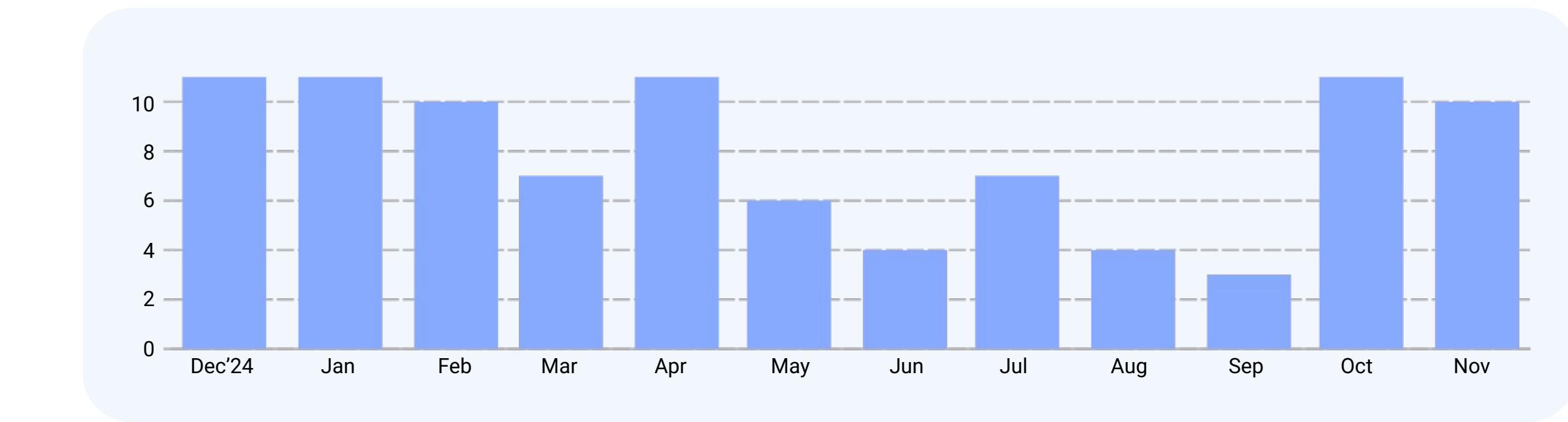
**The Casual space also frequently reuses visual themes from past events.** Activities like Christmas in July are common, where Christmas-themed events are launched in contrast to the summer setting used by most other games.

**This year, Black Friday also gained notable traction: beyond monetization offers, nearly 30% of games launched unique in-game events tied to this theme.**

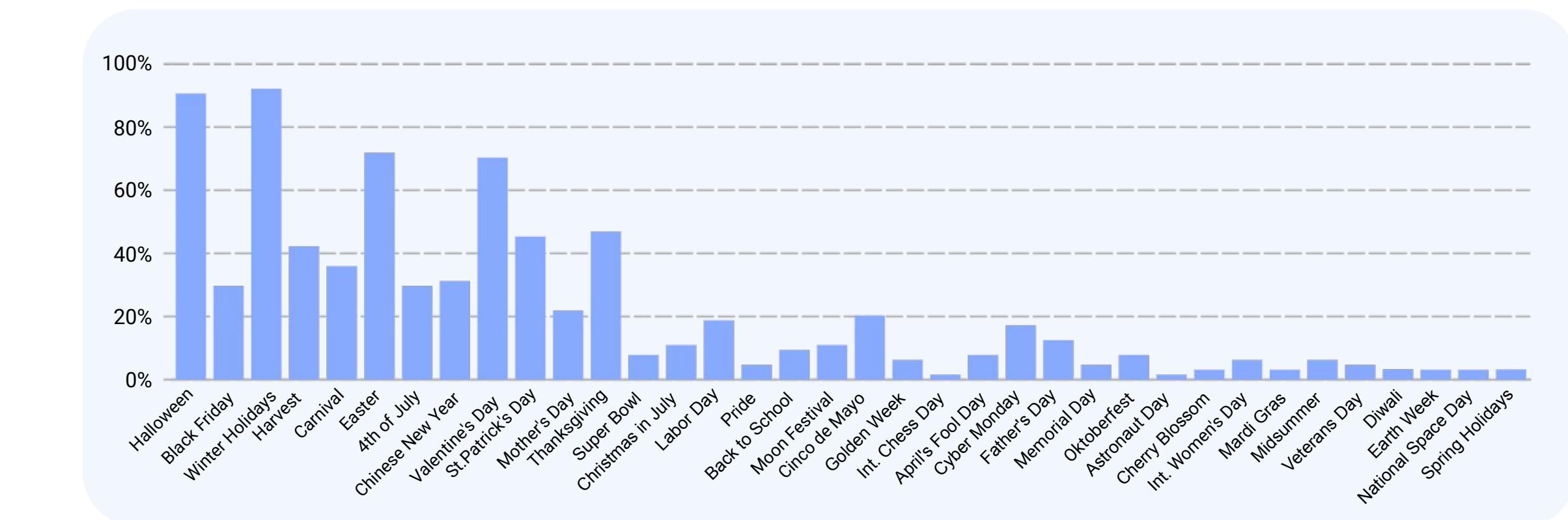
The most popular holidays remain New Year, Halloween, Easter, and Valentine's Day.



**Average number of holiday events per game**



**Most popular holidays in mobile games**



# Midcore LiveOps Trends

# Midcore

**Midcore games combine difficulty and fun, offering more complex game mechanics, longer play sessions, and a moderate level of strategy and skill required to progress.**



Pokémon TCG Pocket



Whiteout Survival



Clash Royale

# Key takeaways

## Midcore growth remains stable but slows in revenue

Downloads grew at 8–9% YoY, while revenue growth is slowing down from +3.7% to +2.3%.

## Strategy overtakes RPG as the top subgenre

Strategy shows the strongest growth (+18% in revenue, +19% in downloads), while RPG declines; Shooters grow moderately.

## Stable LiveOps growth in Midcore

Event density grows steadily throughout the year, with rising use of Fishing, Digging, and Album mechanics alongside core formats.

## Login Calendar leads growth amongst mechanics

Login Calendar leads adoption (+93%), with Monopoly, Digging (~30%), and Album (+92%) also growing, although Album remains unevenly implemented.

## Growing mechanic: Monopoly

Monopoly remains niche in Midcore but is appearing more often in existing titles, with some new adopters like *Legend of Mushroom* joining in 2025.

## Co-op grows faster in Midcore

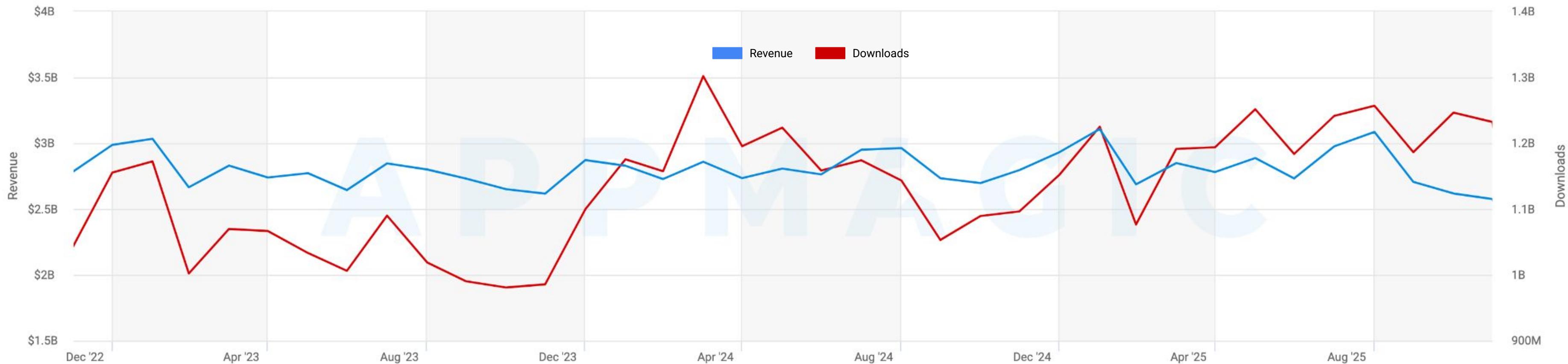
Cooperative activities grow faster than the Competitive, with LiveOps focused on short-term retention and revenue.

## Higher K-factor impact in Midcore

Compared to other niches, the Midcore segment shows a stronger K-factor influence, driven by more active and cohesive player communities.

# Yearly trend

## Trends in downloads and revenue for 2022–2025 (Worldwide)



The Midcore segment **shows a pattern of stable, sustainable growth over the years both in downloads and revenue.**

While **downloads growth has remained high** at 8-9% annually, **revenue growth has been more modest** and is gradually decelerating (from +3.74% to +2.25%).

## Dynamics of change in downloads and revenue for 2022–2025 (YoY)

Period	Revenue	YoY change, %	Downloads	YoY change, %
Dec'22 – Nov'23	\$33.3B	-	12.5B	-
Dec'23 – Nov'24	\$33.7B	3.7	13.8B	9.1
Dec'24 – Nov'25	\$33.9B	2.3	14.4B	8.3

# Changes in the Midcore subgenre

Strategy and RPG are the top two revenue-generating subgenres, with Strategy overtaking RPG in the recent period.

- **Strategy emerged as the leading subgenre with strong growth:** revenue increased by +17.9%, supported by +19.1% rise in downloads.
- **RPG, previously the segment leader, experienced a significant revenue decline of -15.3%, accompanied by an -8.1% drop in downloads.**

**Shooter demonstrated positive growth** in both revenue (+9.8%) and downloads (+8.2%).

Genre	Rev Dec'23 - Nov'24	Rev Dec'24 - Nov'25	YoY change, %	Dis Dec'23 - Nov'24	Dis Dec'24 - Nov'25	YoY change, %
Action	\$1.6B	\$1.2B	-22.4%	2.2B	2.1B	-2.8%
Adventure	\$167.9M	\$177.1M	5.5%	159.7M	176.4M	10.4%
Arcade	\$996	\$19,432	1851%	40,960	247,371	503.9%
Geolocation Games	\$857.6M	\$750.0M	-12.5%	58.6M	54.1M	-7.6%
Racing	\$360.9M	\$307.6M	-14.8%	1.1B	961.6M	-10.2%
RPG	\$12.8B	\$10.8B	-15.3%	1.4B	1.3B	-8.1%
Shooter	\$2.9B	\$3.2B	9.8%	2.2B	2.4B	8.2%
Simulation	\$2.4B	\$2.9B	17.4%	3.9B	4.2B	7.5%
Sports Games	\$1.5B	\$1.5B	-2.7%	1.1B	1.1B	3.2%
Strategy	\$11.1B	\$13.1B	17.9%	1.8B	2.1B	19.1%

The biggest relative growth came from Strategy, due to games like:



Honor of Kings

Mobile Legends

Kingshot

# Changes in event activity

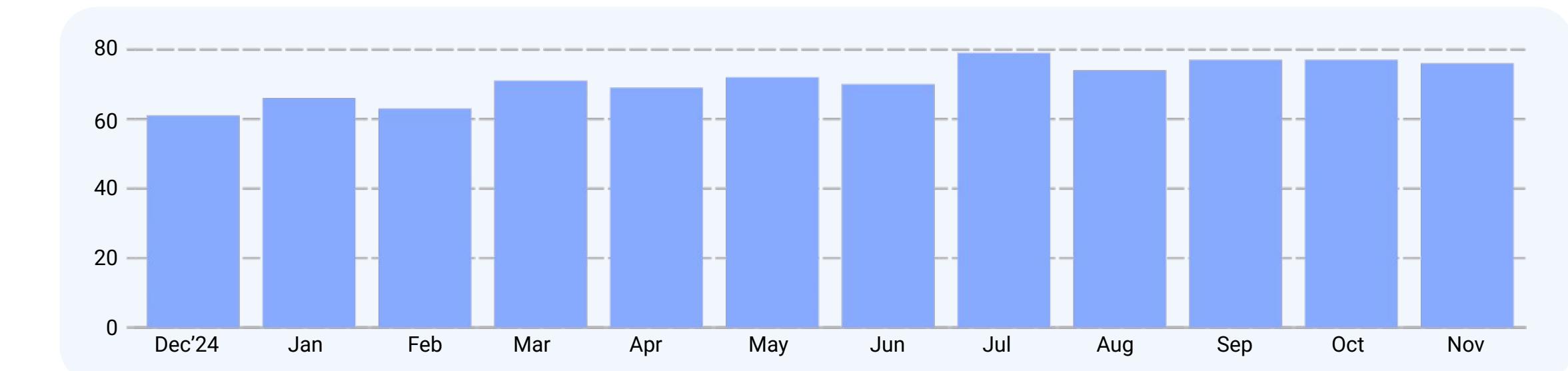
Unlike the Casual segment, which is highly dependent on seasonality, event density in Midcore is growing more steadily. Compared to the beginning of the year, growth also reached 15%, while, when measured against December, the increase is significantly higher at 23%.

At the same time, titles in this segment are more likely to run high-activity events during summer, such as collaborations, anniversaries, and half-anniversaries, which helps maintain overall activity on a monthly basis.

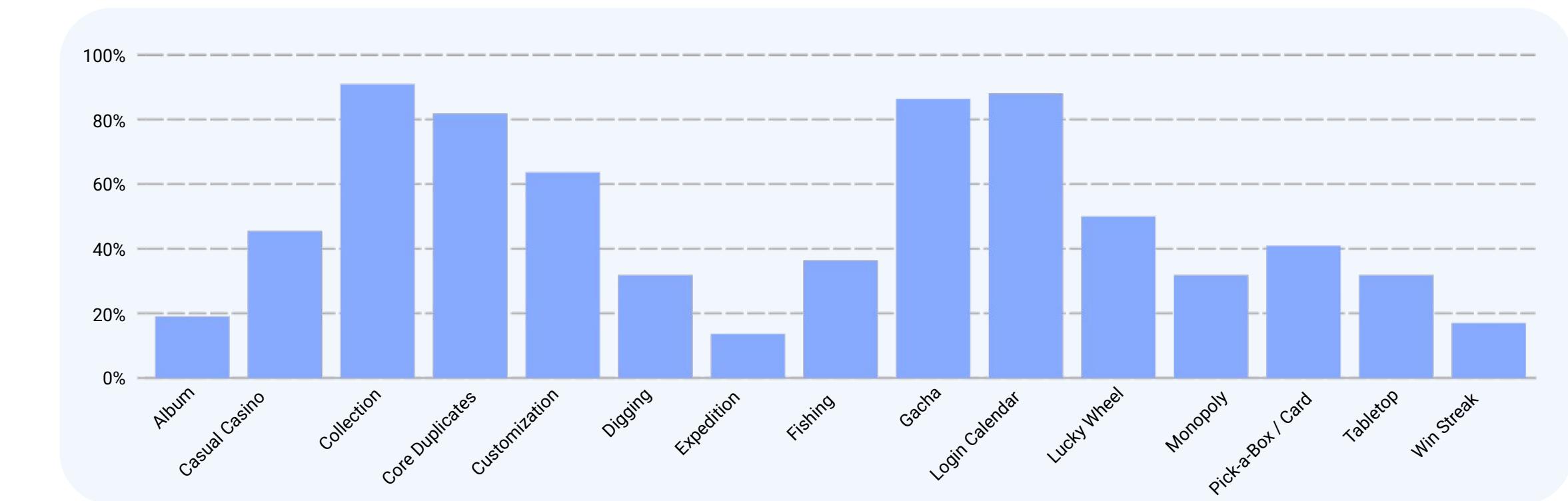
The most popular mechanics in events remain Collection and Login Calendar, which are core mechanics for the genre.

However, in 2025, noticeable growth in adoption across other games was observed for mechanics such as Fishing, Digging, and Album, which are traditionally less common for the genre.

The average number of LiveOps event launches per game per month



Representation of mechanics in 2025



\*excluding events where mechanics are not listed



# New events

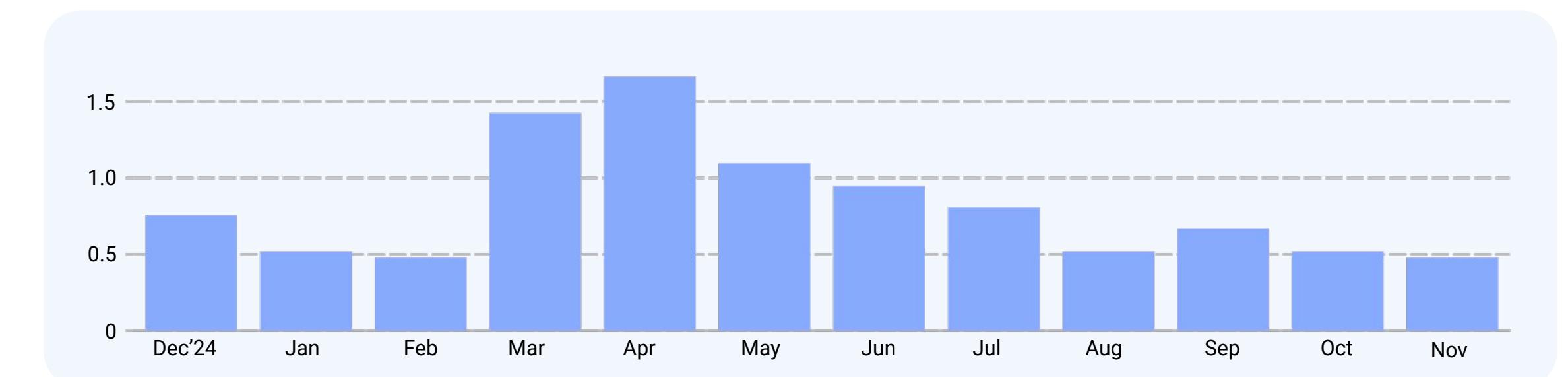
**The highest peak of activity for new events in the Midcore segment occurs in March and April**, a popular period for launching collaborations at the beginning of the year, when most major holidays are already over and titles focus on monetizing their audience. During this period, the number of new events is especially high, reaching 1.4–1.65 events per game per month.

**Most often, events reimagine existing core gameplay into an event format**, allowing players to engage with familiar mechanics in a new way (32% of events).

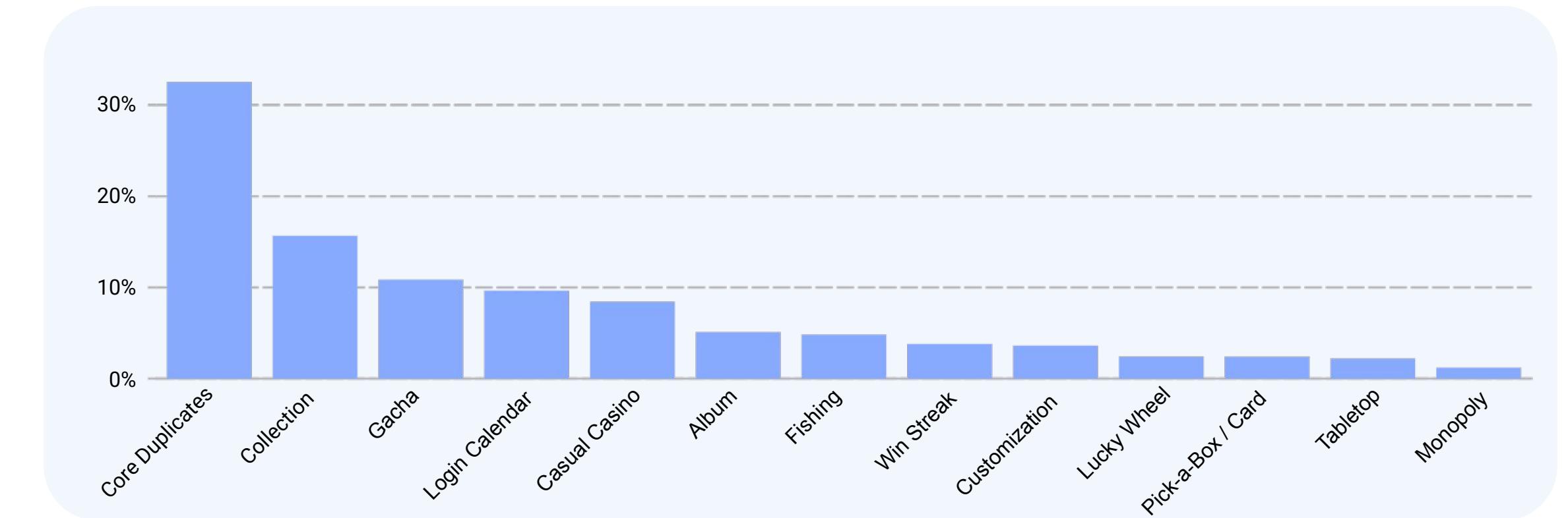
**The second most common choice for new events is Collection mechanics**, used in 15% of all cases.

**Mechanics that differ significantly from the Core gameplay are used very rarely** (for example, Monopoly sits at just 1%).

## Monthly dynamics of new event releases per title



## Distribution of mechanics across new events\*



\*excluding events where mechanics are not listed



# Growing mechanics

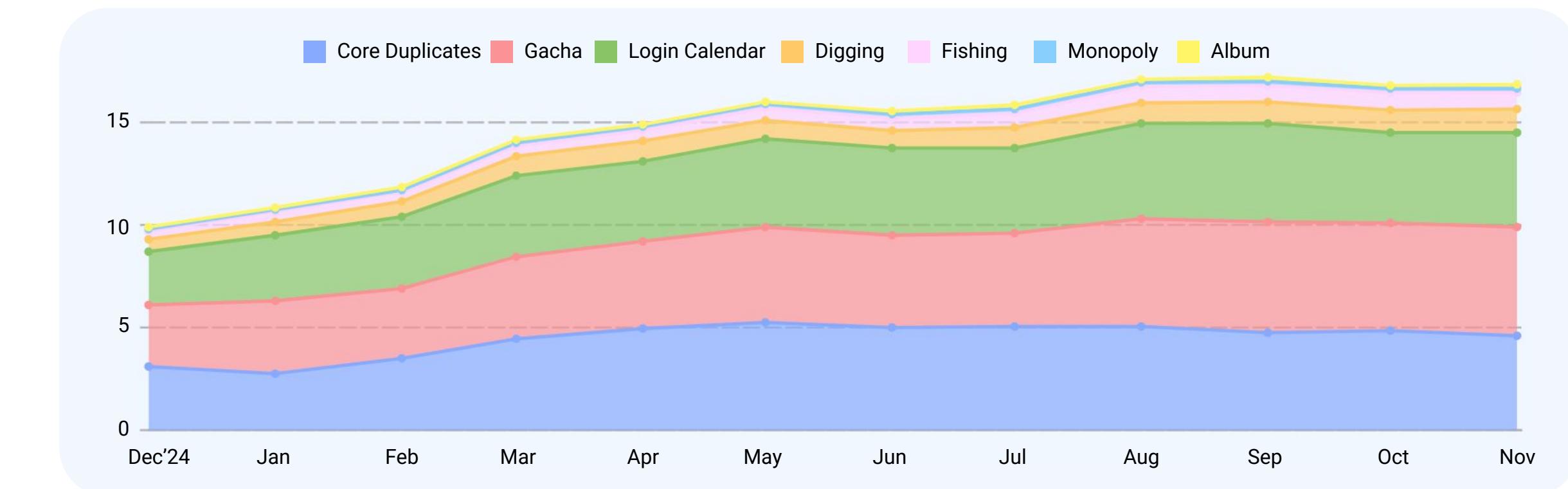
**The strongest growth among popular mechanics is observed in Login Calendar.**

Despite already being widely used, its adoption increased by 93%.

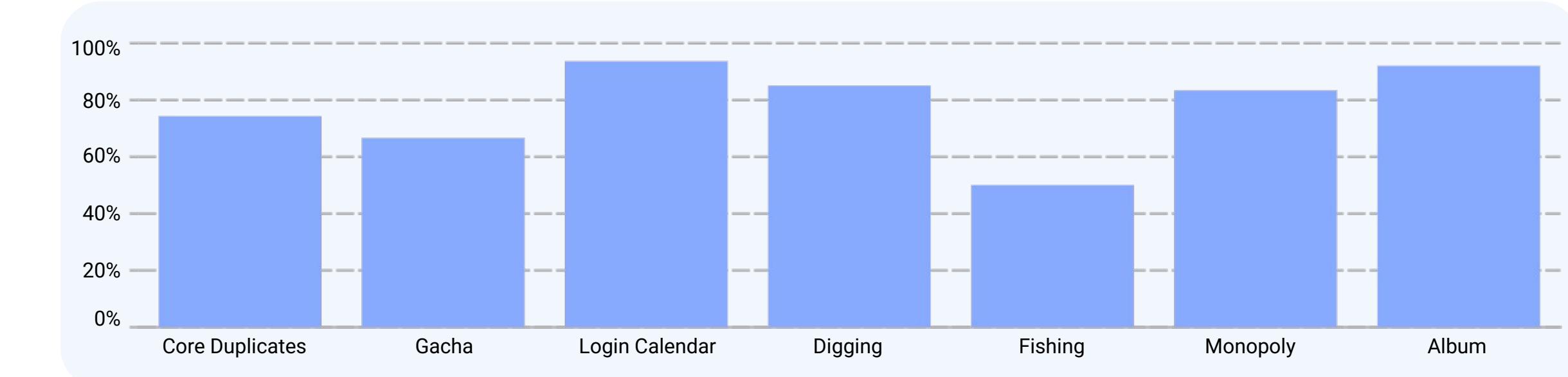
**Noticeable growth is also seen in the Monopoly and Digging mechanics**, at around 30%, as they now appear in schedules much more frequently than before.

**The Album mechanic has also shown explicit growth (92%)**, but its presence remains sporadic and unstructured. Games are gradually introducing the mechanic, but its implementation has not yet been standardized within the segment.

**Monthly dynamics of the fastest-growing mechanics per game**



**The fastest-growing mechanics by number of launches per game, %**



# Growing mechanics: Album

In 2025, Midcore titles began actively adopting Album and similar Collection mechanics in their games.

While [Whiteout Survival](#) features a classic album as part of a complex event, others adapt the mechanic to better fit their genre-specific requirements.

For example, in [Call of Duty®: Mobile](#), during the [Collapse Mutation](#) event, players could collect characters in a special event album.

## Games with Album mechanics:



Whiteout Survival



Call of Duty®: Mobile



PUBG MOBILE



AFK Journey



Mechanic's presence:  
12%

YoY growth:  
92%

# Growing mechanics: Monopoly

The Monopoly mechanic is not significantly more widespread in Midcore events overall; however, its frequency within schedules of the games that adopted it during the peak of [Monopoly GO!](#)'s popularity has increased noticeably.

For example, in [Evony: The King's Return](#), the [Great Expedition](#) event has been running on a regular basis since 2024, with its most recent launch taking place in December 2025.

At the same time, some games adopted this mechanic for the first time this year. For instance, [Legend of Mushroom](#) introduced its [Magic Monopoly](#) event for the first time in April 2025.

## Games with Monopoly mechanics:



Last War: Survival



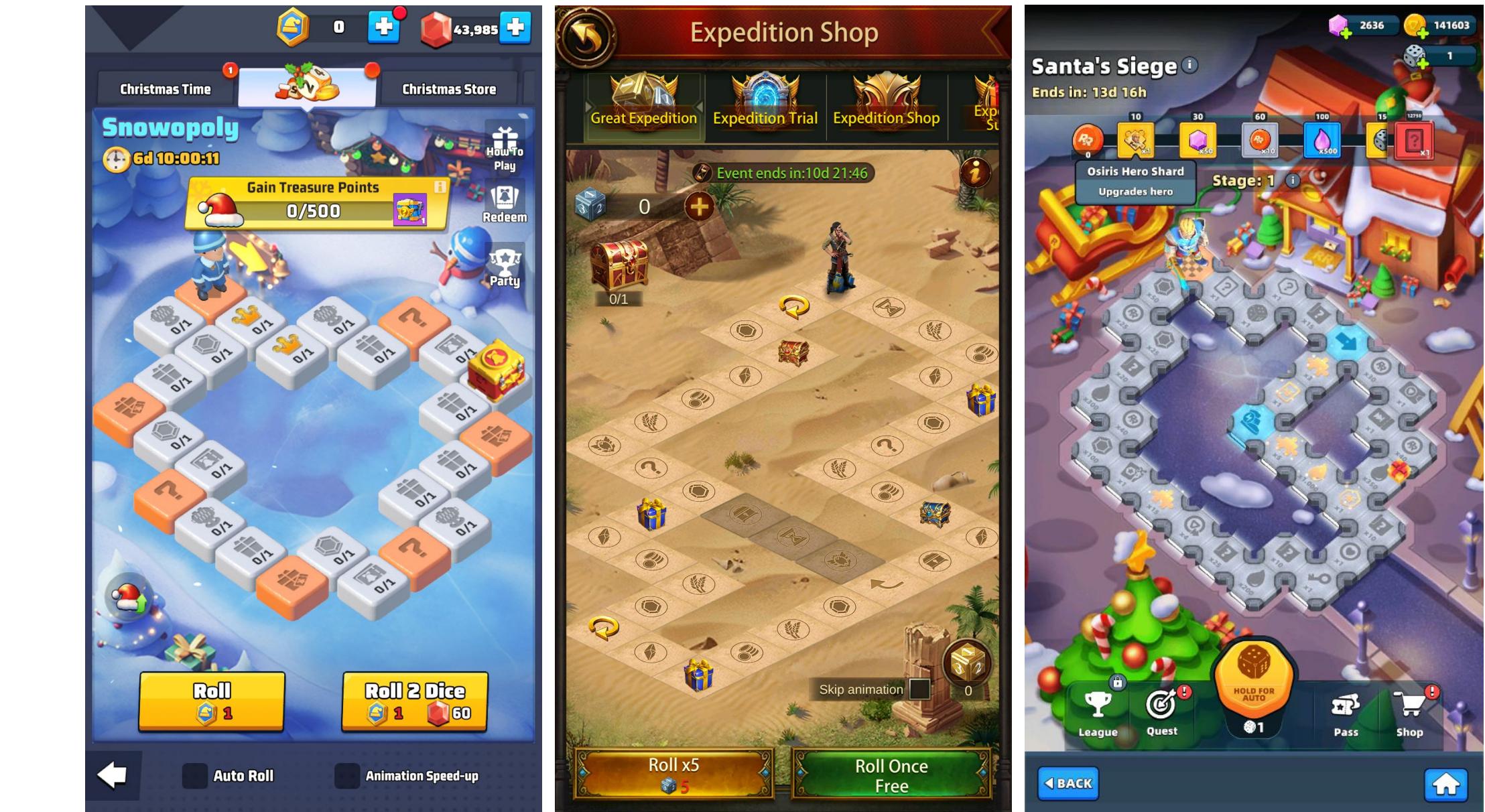
Evony: The King's Return



Call of Duty®: Mobile



Capybara Go!



Mechanic's presence:  
31%

YoY growth:  
83%

# Economy & monetization

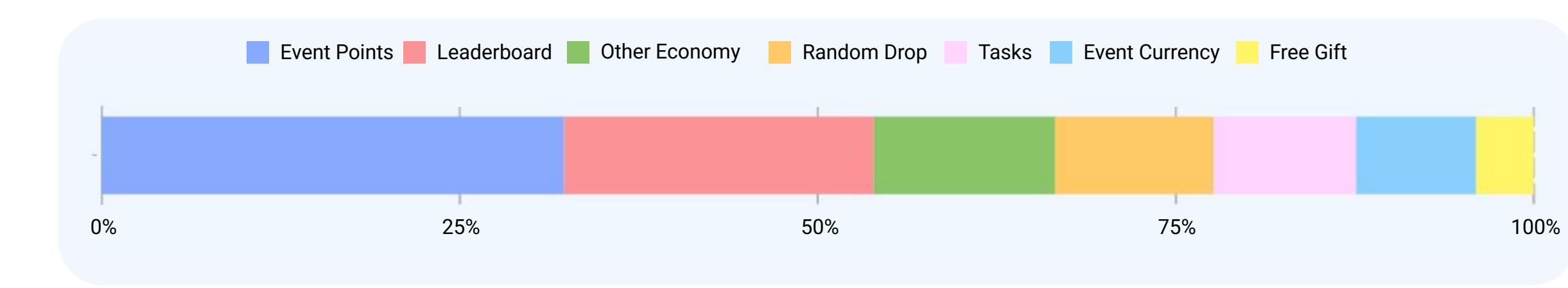
Unlike the Casual segment, Midcore focuses its events primarily on paying users and whales (almost 70%), while casual and new users remain a secondary target.

Sales are also a less popular monetization approach. The main focus is placed on Special Offers and Hard Currency sinks.

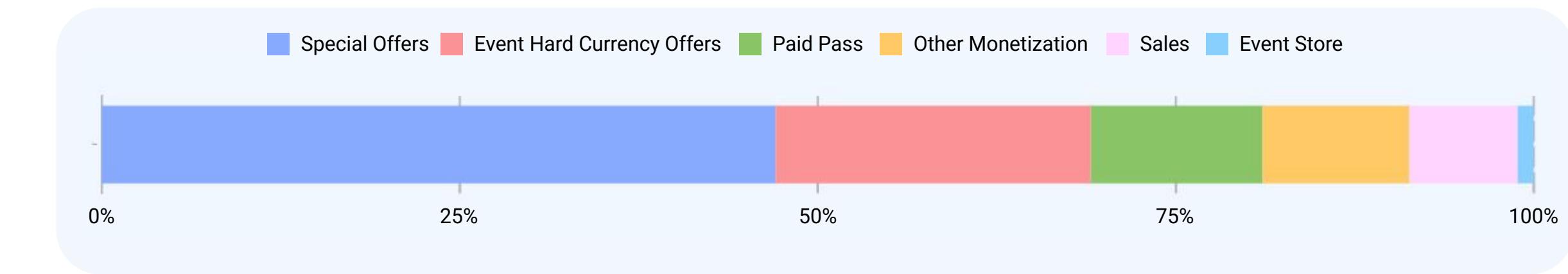
Leaderboards are used much less frequently as well, with the core monetization economy centered around Event Points instead.



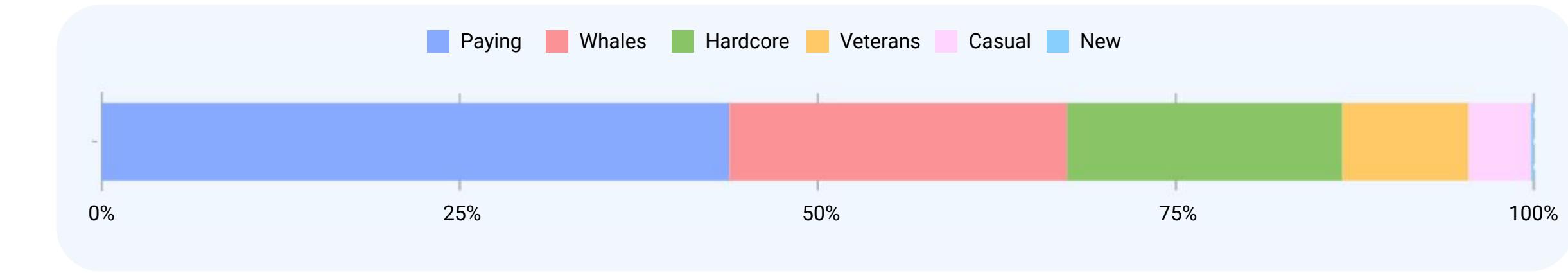
## By economy tag



## By monetization type



## By player type



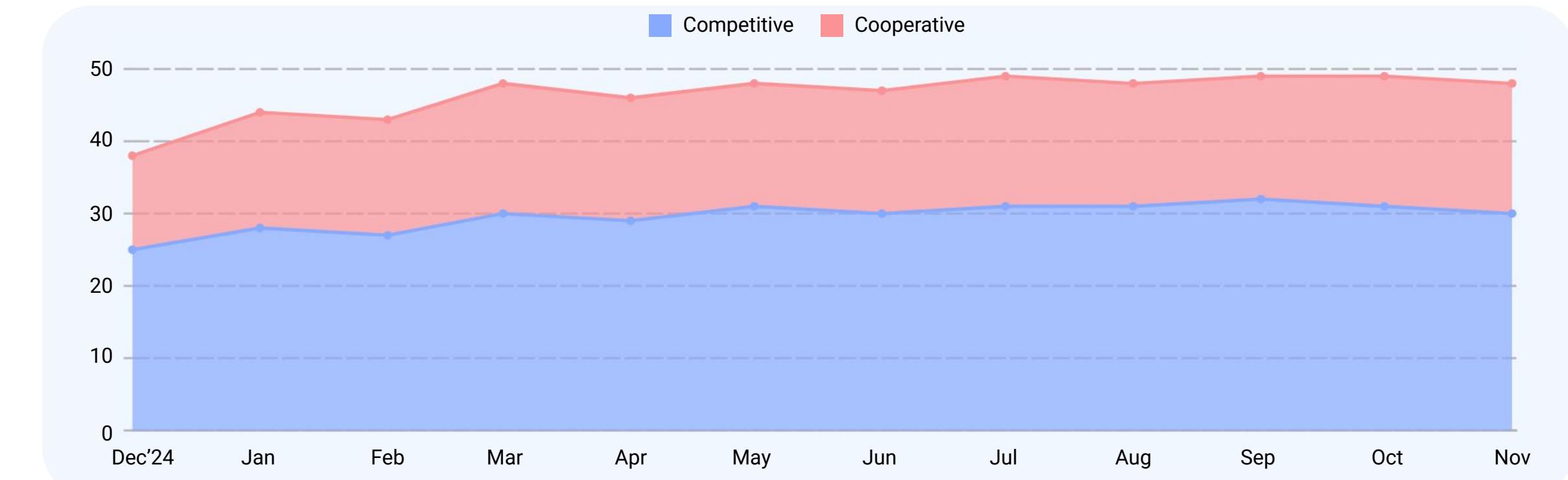
# User motivation

**In the Midcore segment, Cooperative activities are more popular than elsewhere and have shown stronger growth compared to the beginning of the year: +16% versus January and +36% versus December 2024.**

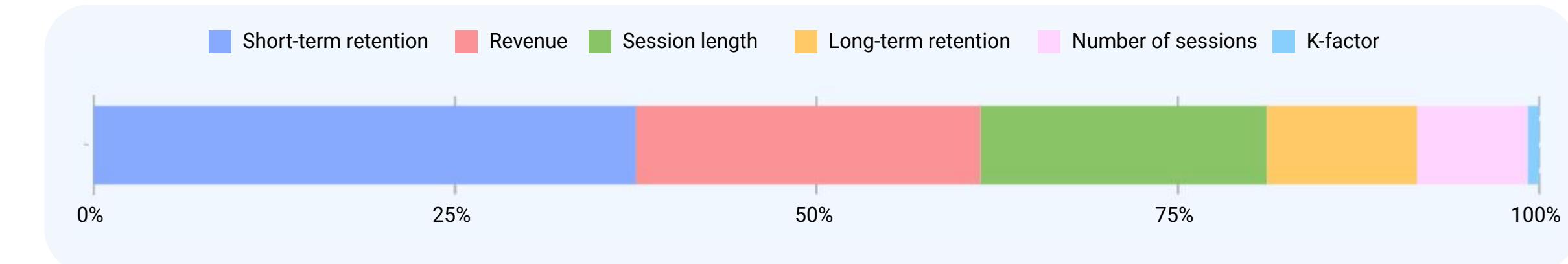
**Growth in Competitive activities is less pronounced, reaching +16% compared to December 2024 and +8% compared to January.**

**In terms of motivation, Midcore games most often focus on short-term retention and revenue. However, compared to other niches, the impact of the K-factor is slightly higher in the Midcore segment due to stronger community presence.**

## By social motivation



## By goal



# Growing trend: Cooperative Events

Cooperative events are gaining popularity in both relatively simple games and full-scale 4X Strategy titles. However, **while events are typically focused on players within the same group or guild, some games have moved away from this convention and allow completely unfamiliar players to participate together.** For example, [Legend of Mushroom](#) featured the [Drakebone Sanctum](#) event, which enabled players from the same server to team up and take part in a competitive activity.

**There are also more traditional implementations.** For instance, [Dark War: Survival](#) launched the [Cozy Xmas](#) Christmas event, which had alliance members joining efforts to grow their common Christmas tree by completing tasks.

## Games with Cooperative events:



Whiteout Survival



Brawl Stars



Rise of Kingdoms



Diablo Immortal



YoY growth:  
16%



# Holidays

Events in the Midcore segment are also largely tied to major holidays, such as New Year, Halloween, and Easter.

However, unlike the Casual segment, events are released less frequently due to longer event durations, meaning the average number of holiday events rarely exceeds 10 per game per month.

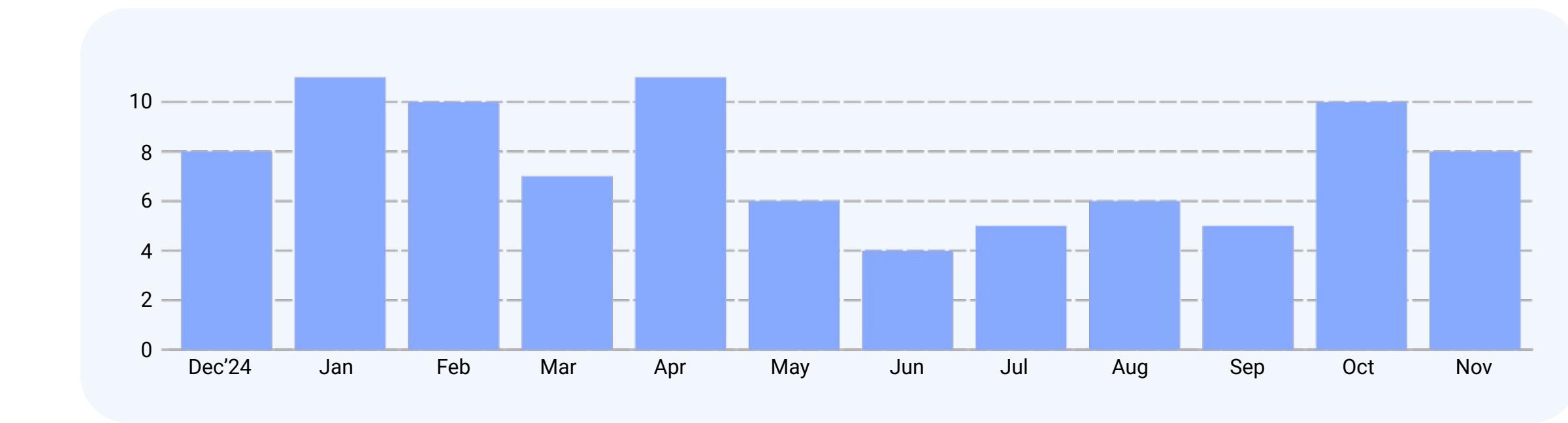
The Midcore segment is also less dependent on local holidays.

In contrast to Casual games, niche holidays are generally not celebrated, and shorter holidays such as Thanksgiving or St. Patrick's Day are acknowledged less frequently.

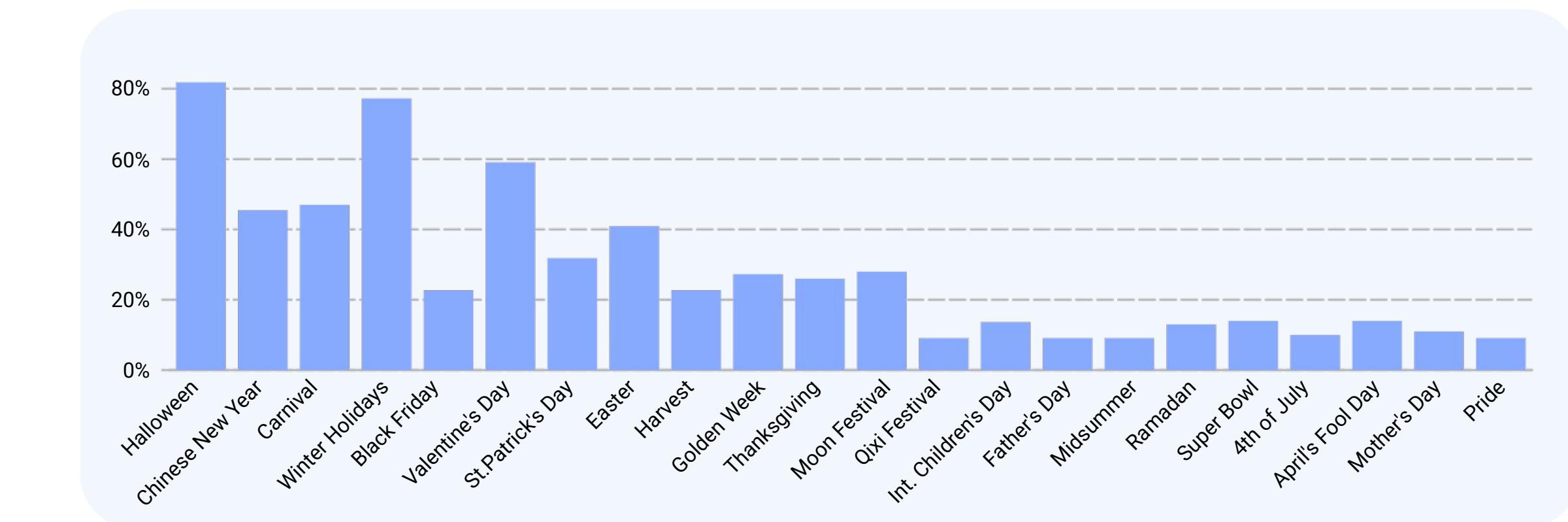
The only notable exception is Valentine's Day, which, despite its short duration, ranks among the top three most frequently celebrated holidays in the midcore segment.



## Average number of holiday events per game



## Most popular holidays in mobile games



# Hybrid casual LiveOps Trends

# Hybridcasual

**Hybridcasual games combine intuitive, easy-to-learn gameplay with depth added through progression systems, unlockable content, and monetization features such as ads and in-app purchases.**



**Survivor.io**



**Color Block Jam**



**All in Hole**

# Key takeaways

## Hybridcasual revenue outpaces user growth

Revenue surged (+82% and +75% YoY) while downloads stagnated and then even declined (+3.5% → -4%).

## Puzzle becomes the top Hybridcasual genre

Puzzle overtook Arcade, driving the strongest revenue growth (+136%) despite declining downloads.

## Hybridcasual LiveOps is expanding

Event density rose by 19%, with Core Duplicates and Race as the most common mechanics.

## Lava Quest continues to scale

Lava Quest remains a large and actively growing mechanic (+114%), driven mainly by denser LiveOps schedules.

## Digging, Gacha, and Casual Casino are expanding

Digging and Gacha are gradually adopted from Casual games, while Casual Casino shows uneven but impressive growth (+132%).

## Growing mechanic: Casual Casino

Casual Casino mechanics are expanding in Hybridcasual, moving beyond Plinko to Slots, Gacha, and other Random Drop offerings.

## Hybridcasual focuses on Competition

Hybridcasual events are mainly competitive, driven by Lava Quest, with LiveOps focused on session length and short-term retention.

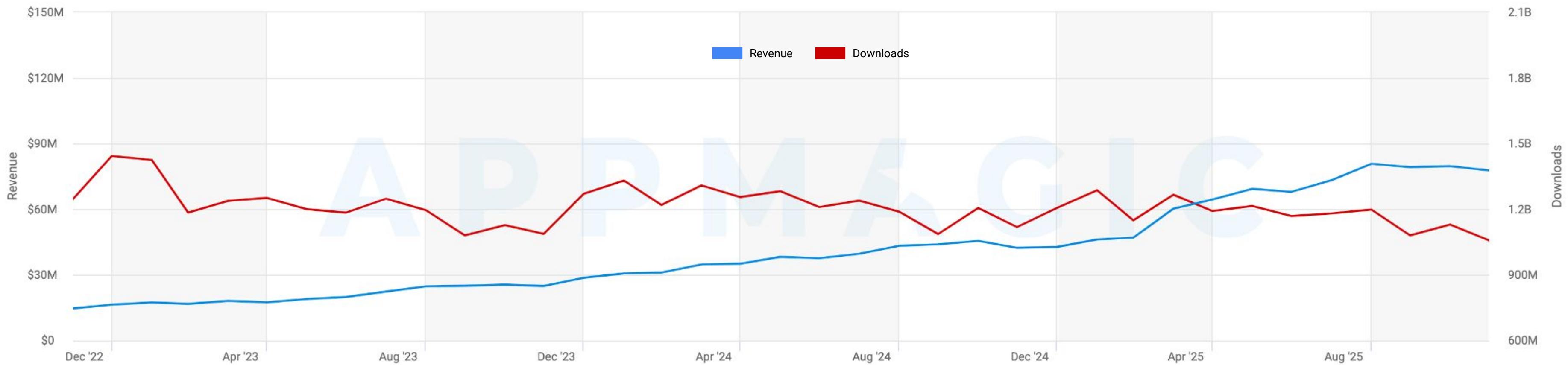
## Hybridcasual is highly seasonal

Event activity peaks during the fall and winter holidays, while keeping quiet for most of the year, with minor spikes around Valentine's Day and Easter.



# Yearly trend in Hypercasual

Trends in downloads and revenue for 2022–2025 (Worldwide)



The Hypercasual segment **has shown explosive revenue growth over the past two years**, increasing by 82% and then by 75% year over year. **This growth has been driven primarily by Hybridcasual titles** that rank among the highest-grossing within the supergenre—rather than by classic Hypercasual games. However, user growth did not match this revenue surge. **Downloads grew only slightly (+3.5%)** and then **declined by over 4%** in the most recent period.

**Dynamics of change in downloads and revenue for 2022–2025 (YoY)**

Period	Revenue	YoY change, %	Downloads	YoY change, %
Dec'22 – Nov'23	\$247M	-	14.2B	-
Dec'23 – Nov'24	\$450M	82.2	14.7B	3.5
Dec'24 – Nov'25	\$788M	75.1	14.1B	-4.1

# Changes in the Hypercasual subgenre

Puzzle and Arcade are the top two revenue-generating subgenres, with Puzzle overtaking Arcade to become the leader in the recent period.

- Puzzle emerged as the leading genre with explosive revenue growth of +136.1%, despite a slight decrease in downloads (-3.3%).**
- Arcade showed more moderate gains with a +36.8% increase in revenue and stable download growth (+2%).**

**Simulation also demonstrated remarkable revenue growth (+111.5%), although its downloads declined (-12.7%).**

Genre	Rev Dec'23 - Nov'24	Rev Dec'24 - Nov'25	YoY change, %	Dis Dec'23 - Nov'24	Dis Dec'24 - Nov'25	YoY change, %
Action	\$19.8M	\$20.2M	1.9%	1.9B	1.7B	-13.1%
Adventure	\$98,819	\$258,489	161.6%	28.8M	19.7M	-31.5%
Arcade	\$210.6M	\$288.1M	36.8%	6.0B	6.2B	2.0%
Kids	-	-	-	88,100	291,942	231.4%
Party Games	\$170,678	\$141,065	-17.4%	24.2M	26.4M	9.2%
Puzzle	\$184.0M	\$434.6M	136.1%	3.5B	3.3B	-3.3%
Racing	\$4.1M	\$3.7M	-10.3%	468.4M	375.8M	-19.8%
RPG	-	-	-	-	47101	-
Shooter	\$5.5M	\$5.4M	-1.8%	431.9M	465.6M	7.8%
Simulation	\$8.2M	\$17.3M	111.5%	2.1B	1.8B	-12.7%
Sports Games	\$3.1M	\$2.9M	-5.3%	134.7M	137.1M	1.8%
Strategy	\$14.9M	\$15.6M	4.5%	148.5M	133.9M	-9.8%
Tabletop	\$31,088	\$15,539	-50%	2.0M	1.1M	-42.0%

The biggest relative growth of Puzzle came due to games like:



# Changes in event activity

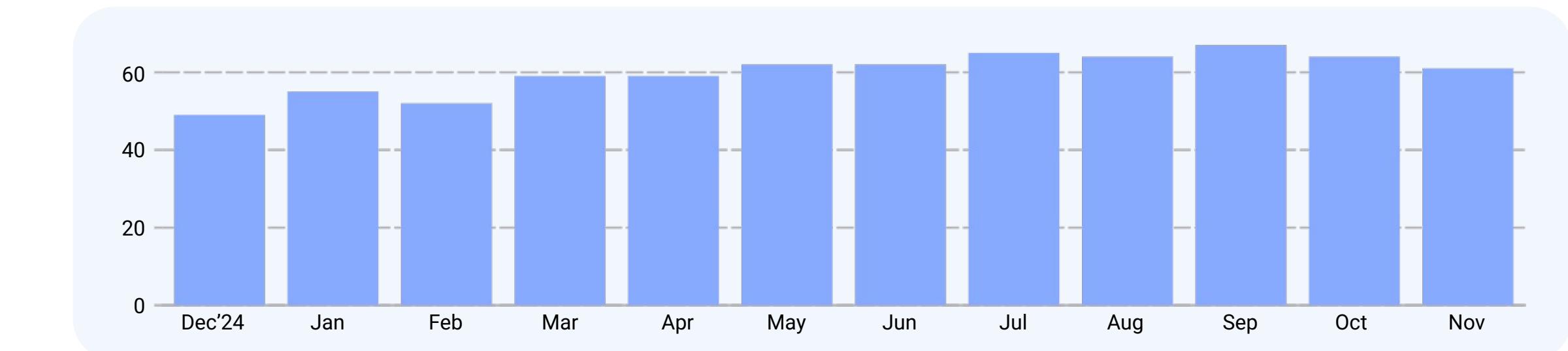
As in most segments, the number of monthly events per Hybridcasual game has increased, reaching a growth figure of 19%. This trend reflects the segment's dependency on other niches.

To remain competitive, titles need to develop both meta gameplay and LiveOps. **At the moment, an average game runs 64 events**, which is slightly lower than in the Midcore segment (76).

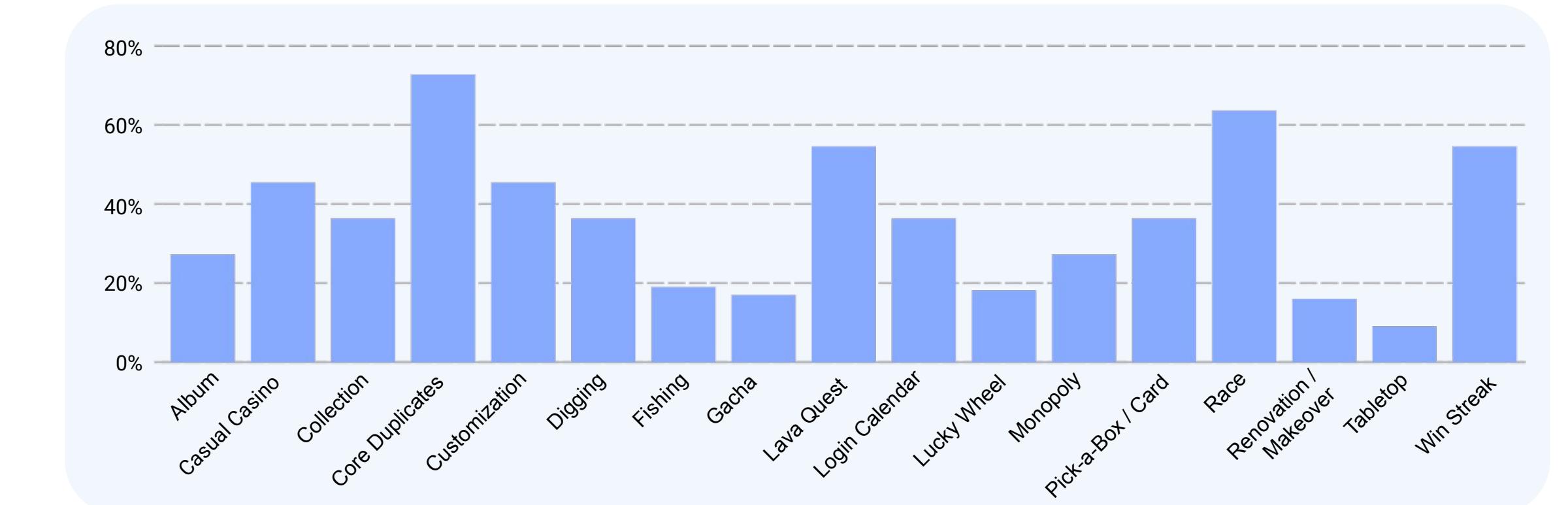
The most widely represented mechanics in games at the moment are **Core Duplicates**, featured in 72% of events, and **Race**, featured in 63% of events.



The average number of LiveOps event launches per game per month



Representation of mechanics in 2025



\*excluding events where mechanics are not listed

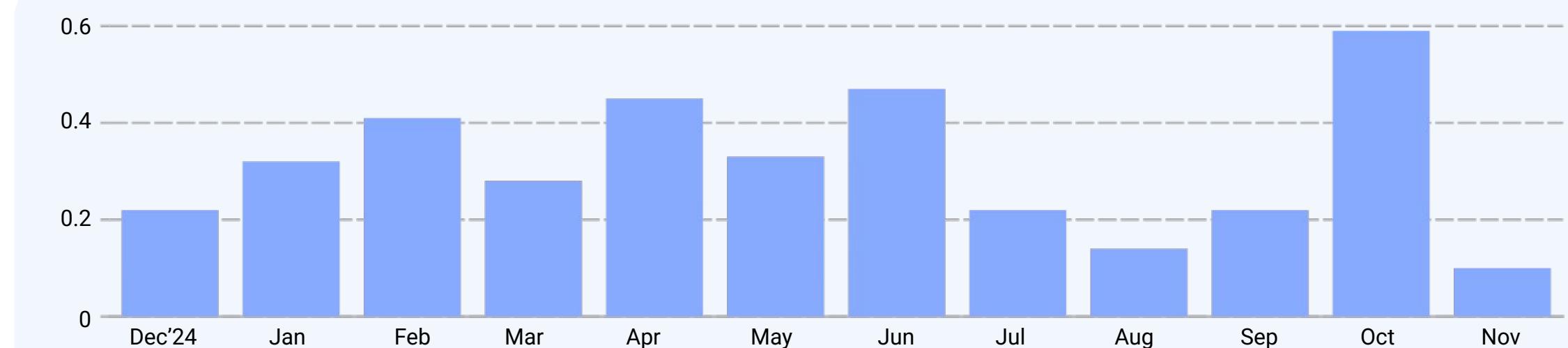
# New events

**The highest peak of new event activity in the Hybridcasual segment occurred in October**, ahead of the holiday season, when games launched an average of nearly 0.6 events per game. Outside this period, the Hybridcasual segment remains less active. On average, only 0.2–0.3 new events per game per month are released, which is significantly lower than in other segments.

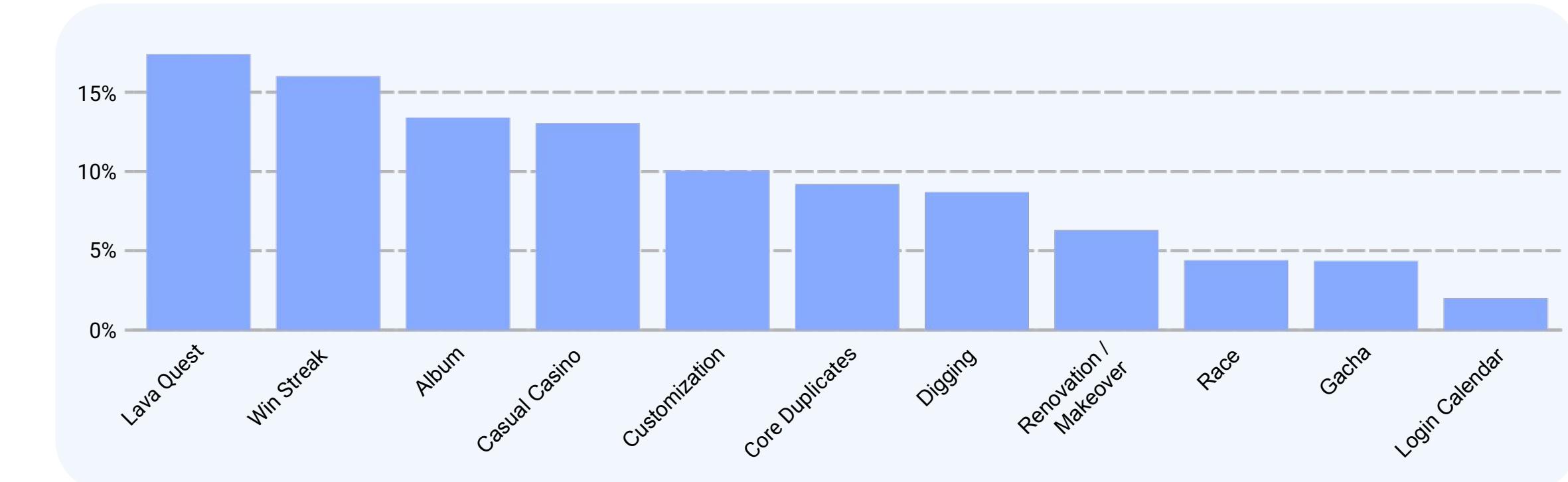
**Popular choices for new events include Lava Quest and Win Streak mechanics, as well as Album**, all of which are increasingly penetrating the segment.

Interestingly, despite the high overall popularity of Race events, they are being introduced as new events far less frequently. Instead, games tend to merely update the setting and visual presentation, while keeping the underlying mechanic unchanged.

## Monthly dynamics of new event releases per title



## Distribution of mechanics across new events\*



\*excluding events where mechanics are not listed

# Growing mechanics

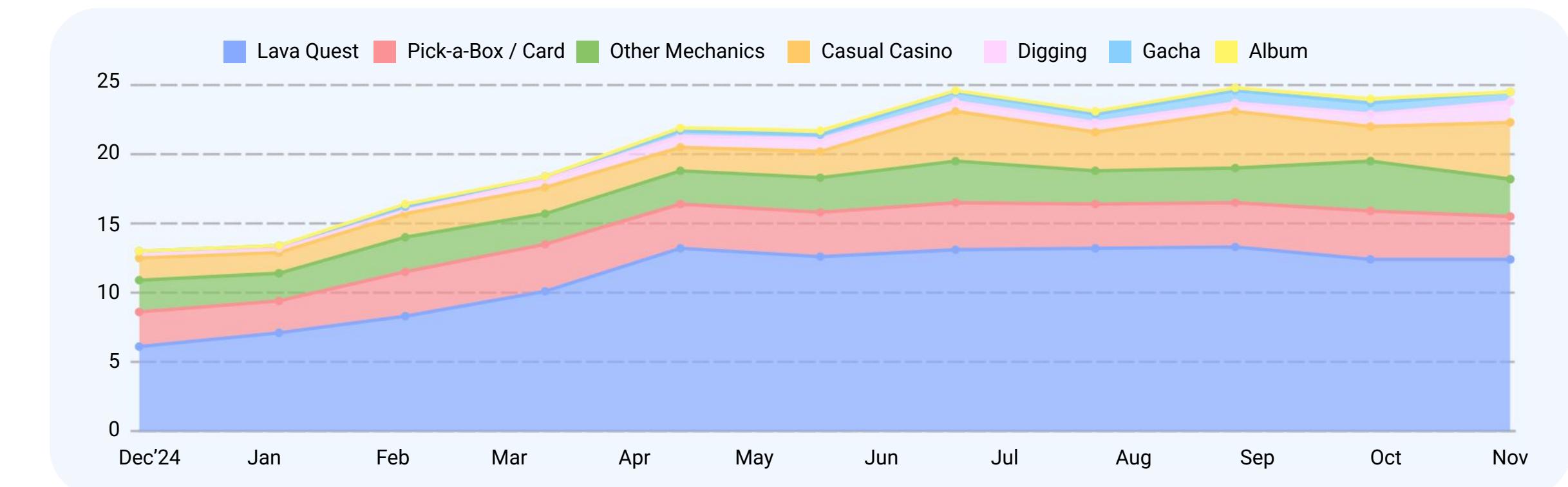
**Significant growth in schedules was observed for the Digging and Gacha mechanics.** Despite their relatively limited presence in the segment, games are gradually adopting these mechanics from the Casual space, further deepening their LiveOps.

Among popular mechanics, **Lava Quest** showed **particularly strong growth (114%)**, primarily driven by the increasing density of LiveOps event schedules.

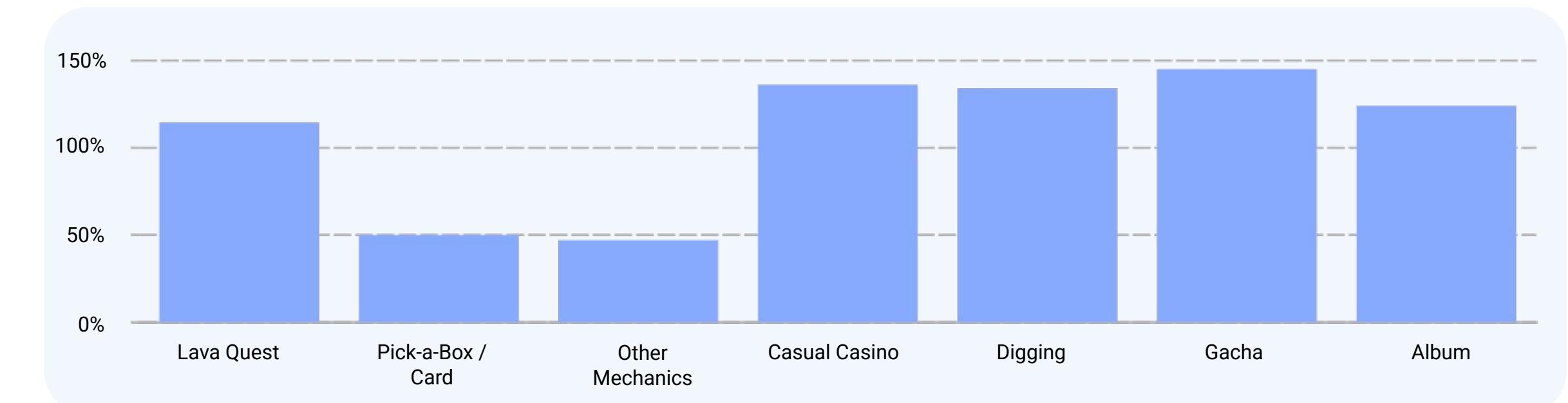
An **unstable but noticeable increase** from around mid-year was also seen in **Casual Casino** mechanics, with an average annual growth of 132%.



## Monthly dynamics of the fastest-growing mechanics per game



## The fastest-growing mechanics by number of launches per game, %





# Growing mechanics: Digging

The Digging mechanic has traditionally been widely used in Coin Looter (Social Casino) titles and other Casual games.

However, this year it has also gained traction in Hybridcasual games and simple Puzzles.

One of the most recent implementations can be seen in [Screwdom](#): the event is based on a Digging mechanic where players collect pickaxes by completing levels. Pickaxes are then used to uncover tiles on a grid in search of gems and other items. Discovering gems and progressing through the grid grants various rewards, including in-game currency and boosters.

## Games with Digging mechanics:



Block Jam -  
3D Block  
Puzzle



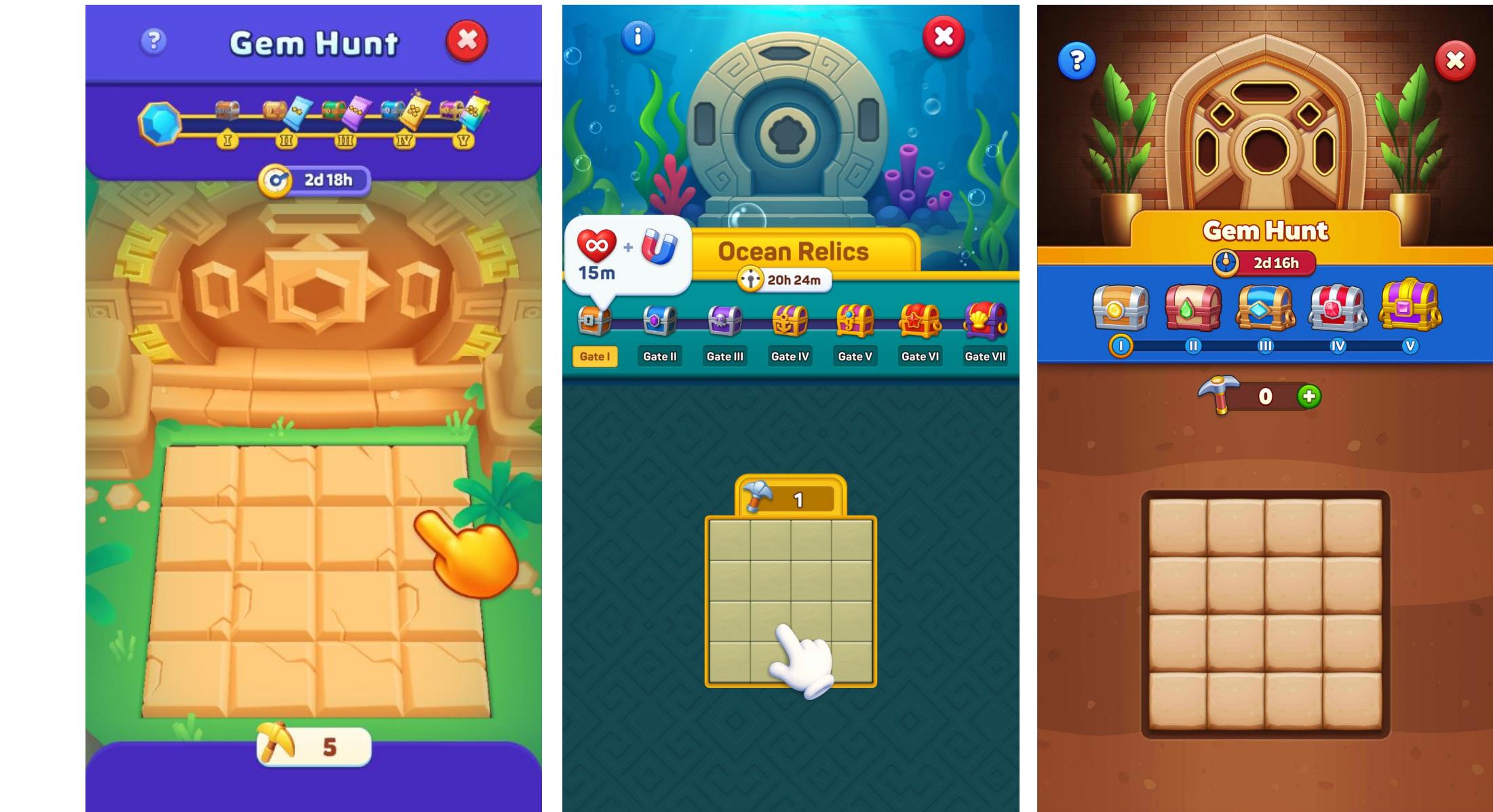
Screwdom



Collect Em All!  
Clear the Dots



Goods Puzzle:  
Sort Challenge™



Mechanic's presence:  
**36%**

YoY growth:  
**134%**

# Growing mechanics: Casual Casino

Casual Casino mechanics began gaining popularity in the Hybridcasual segment around the middle of the year.

Their implementation is no longer limited to Plinko-style machines, but also include Slot machines (for example, the [Pastry Partners](#) event in [Block Jam - 3D Block Puzzle](#)), Gacha mechanics, or other Random Drops (such as [Fruit Frenzy](#) in [Survivor!.io](#) or the [Valentine's Day](#) event in [My Perfect Hotel](#)).

Games with Casual Casino mechanics:



My Perfect Hotel



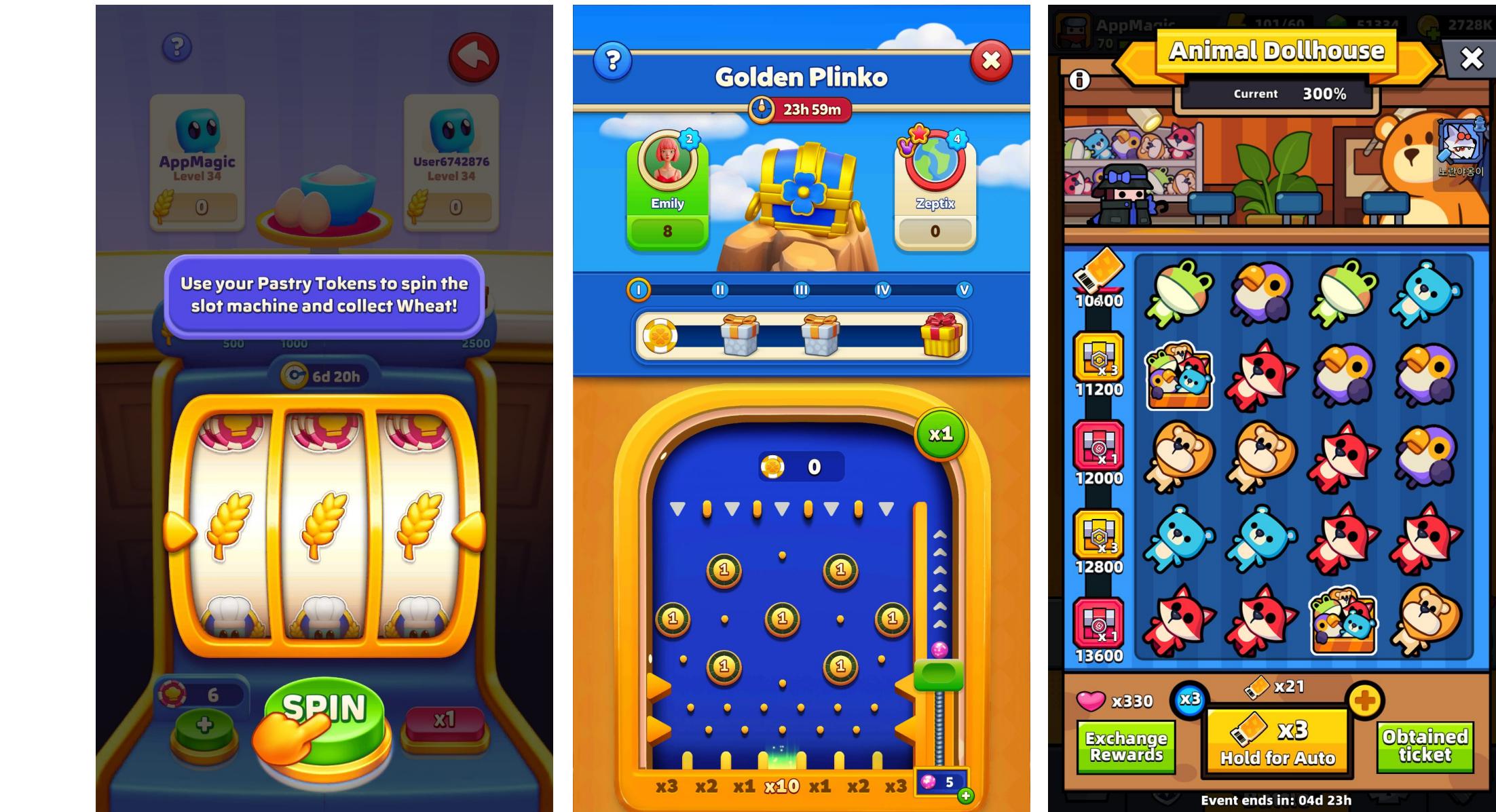
Survivor!.io



Block Jam - 3D Block Puzzle



Match Factory!



Mechanic's presence:  
45%

YoY growth:  
136%

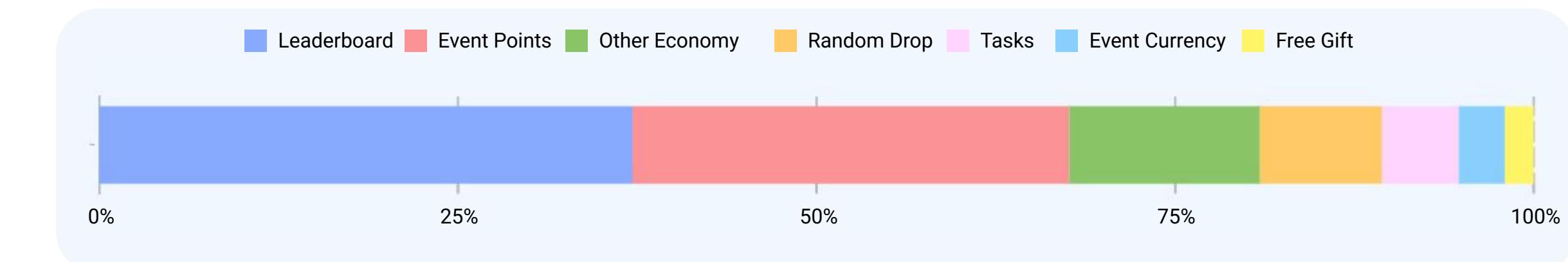
# Economy & monetization

Hybridcasual games tend to design events primarily for hardcore players, but not necessarily for payers. These events are almost impossible to complete through active daily play alone without watching ads or making purchases, with a strong emphasis placed on ad monetization.

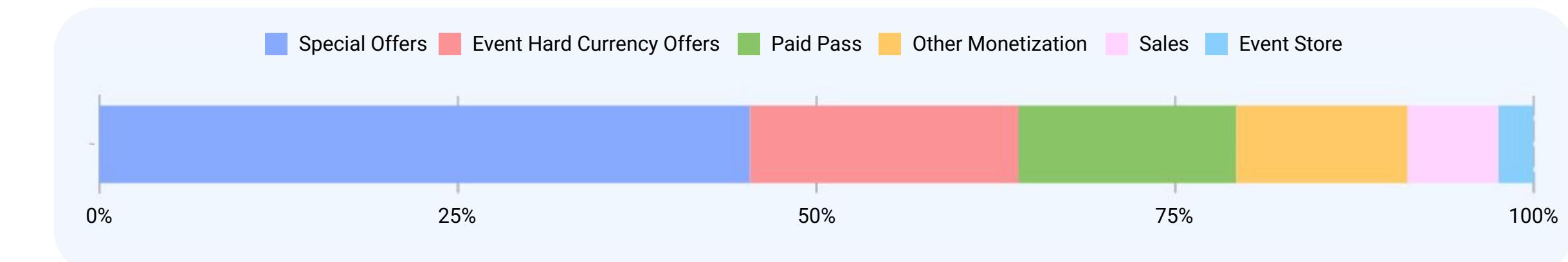
Events targeting paying users are also present, typically built around Leaderboard mechanics that add a competitive incentive.

Unlike Casual games, despite the increasing depth of mechanics in recent years, **events in the Hybridcasual segment rarely focus on whales**.

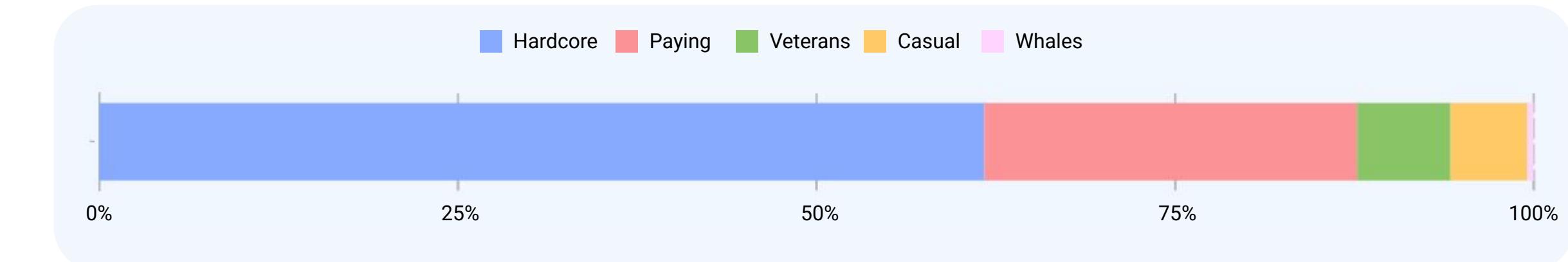
## By economy tag



## By monetization type



## By player type



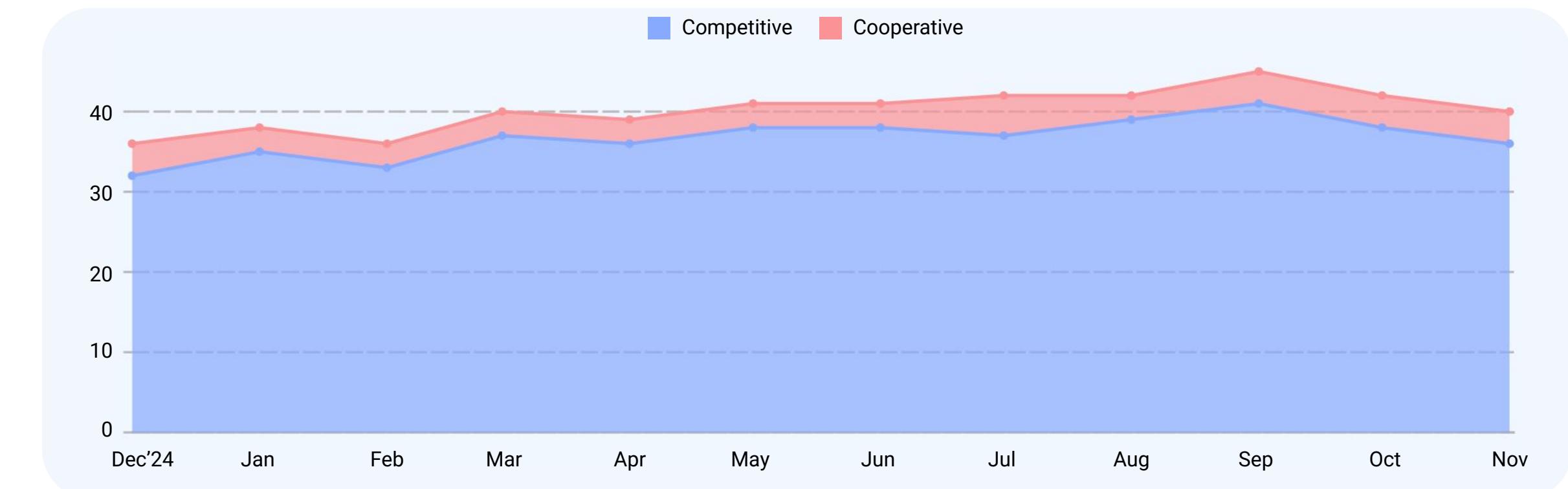
# User motivation

Events in the Hybridcasual space are primarily focused on **Competitive activities**. The main driver behind the growth of competitive events is the **Lava Quest mechanic**, which was mentioned earlier.

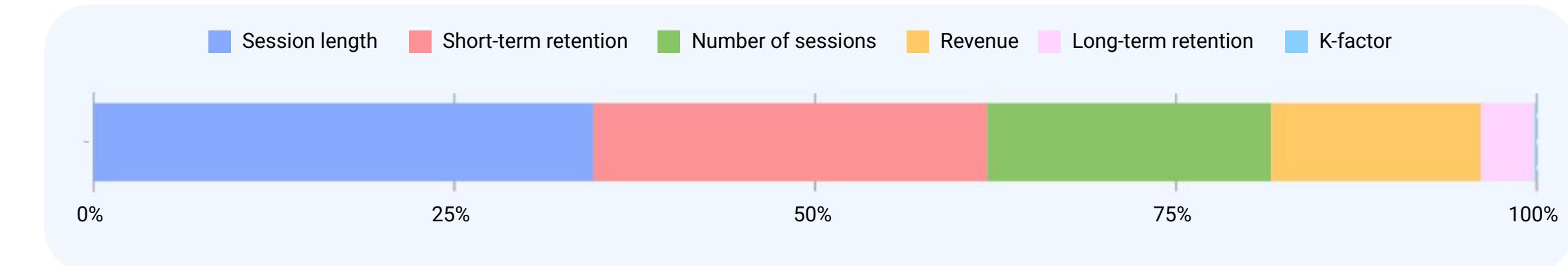
At the same time, a small increase is also observed in **Cooperative activities**. For example, in [Block Jam - 3D Block Puzzle](#), the [Pastry Partners](#) event is held regularly, where players team up with four other players to participate in a cake-baking event. The growth of the share of such events reflects the gradual deepening of LiveOps within this segment.

Overall, in-game events in the Hybridcasual segment largely target two key metrics: session length and short-term retention.

## By social motivation



## By goal



# Holidays

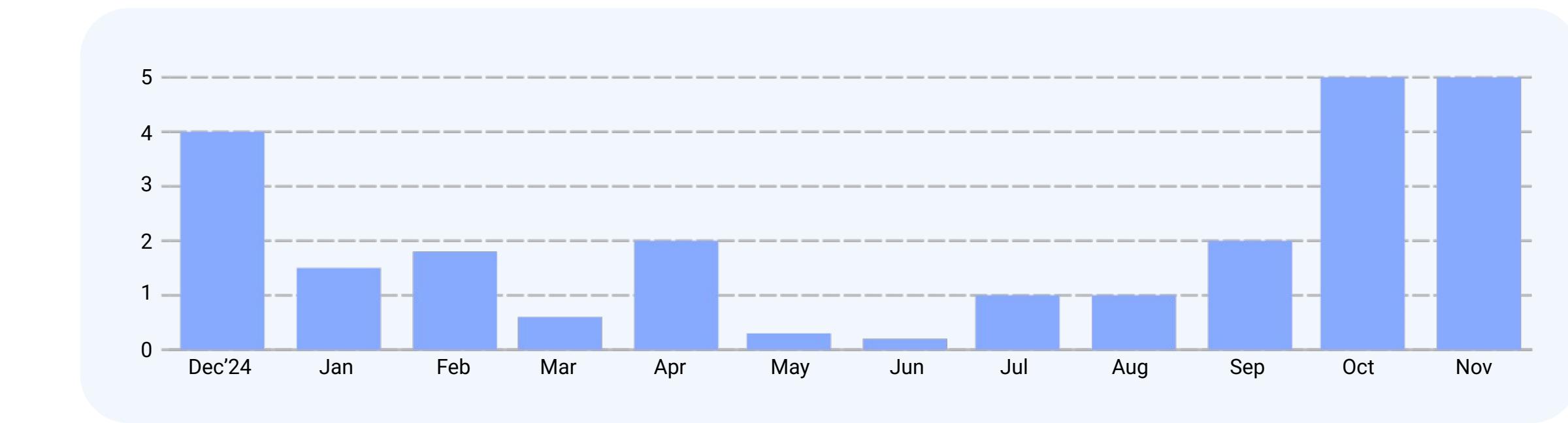
In Hybridcasual titles, the most event-dense period at the moment, as in most other segments, is the fall and winter holiday season.

However, unlike the Casual and Midcore segments, the rest of the year is almost always a quiet period, with only small spikes in February (Valentine's Day) and April (Easter). **The average number of events per month is also significantly lower.**

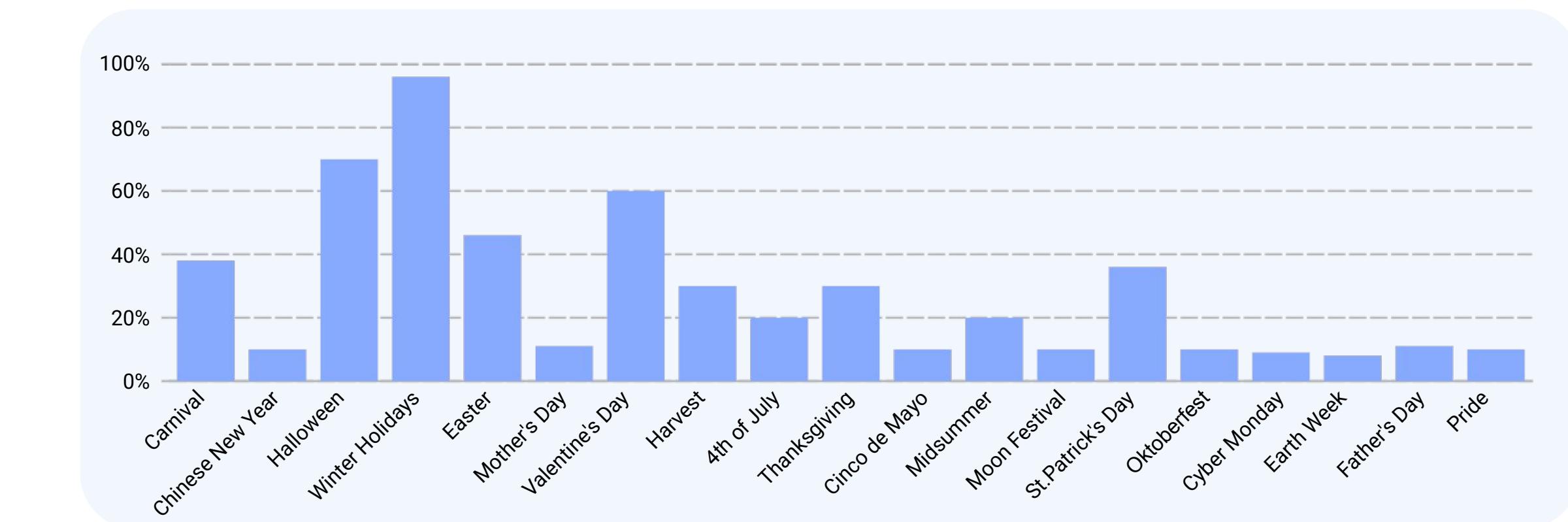
During peak periods, games run up to 5 events, while in late spring and summer, the number of events drops to an average of just 0.5 per title.

**Despite the low overall presence of holidays, some occasions, such as Carnival and St. Patrick's Day, remain relatively popular and are featured in 36-38% of games.**

## Average number of holiday events per game



## Most popular holidays in mobile games



### Maxim Kozhnov

Azur Games

CRO

For Azur Games, LiveOps is the most effective way to stay aligned with our players. Tracking trends like the rise of Race mechanics or the decline of Fishing events helps us adjust in real time. It's not just about keeping up, but about making smart, timely decisions. Observing how other studios organize their events gives us a broader perspective and turns guesswork into strategy.

### Tatiana Kondratyeva

Play Pack

CEO

As a small startup, we don't have the resources to conduct thorough market research ourselves. AppMagic fills that gap perfectly. It provides us with fast, reliable insights into trends, genres, and monetization strategies. This allows us to focus on creating great games. From the idea stage to dealing with LiveOps, AppMagic has helped us prioritize what truly matters and avoid costly mistakes.

### Oleg Nalimov

AppQuantum

Executive Producer

AppMagic addresses our Market and LiveOps analysis needs by customizing its platform based on our feedback. Rapid improvements keep us ahead of market shifts, while the user-friendly deep research tool streamlines trend analysis and inspires both the improvement of our current projects and the production of new ones, effectively enhancing our strategic decisions.

## Testimonials

### Mike Koh

#### Google APAC

Principal Analytical Consultant

Our team leverages AppMagic daily to extract actionable insights that fuel growth for our key customers. Its intuitive interface and efficient workflow optimize productivity, while powerful LiveOps intelligence tools deliver critical insights for game operations.

### Juha Lindell

#### Play Ventures VC

Director of Platform

AppMagic has been invaluable in helping us master LiveOps by surfacing high-level patterns: how many overlapping events top games run, how they pace activity across the week, and the balance between weekday and weekend events so we can extract proven frameworks without getting bogged down in granular detail. Without it, we simply couldn't manually track and deconstruct every event, capture recordings, and note precise timings across dozens of games. Instead, AppMagic's fast, intuitive tools let us focus our limited time on the most promising event formats and make data-driven decisions. For anyone outside the top tier that can afford full internal deconstruction, it levels the playing field and empowers smarter, more impactful LiveOps strategies.

# What is AppMagic?



AppMagic is a one-stop shop solution for analyzing the Mobile and Steam app markets, providing comprehensive insights to help you stay ahead of the competition, identify growth opportunities, and maximize your revenue.

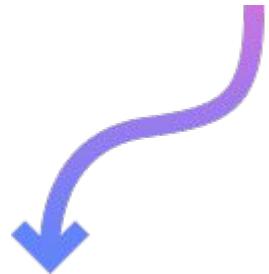


We simplify complex data into actionable insights with an intuitive interface. Whether you're a developer, marketer, or publisher, AppMagic empowers you to make informed decisions that drive success.



A next-gen toolset, it is designed to find actionable, quality insights fast and easy... as if by magic!

**Any questions?  
We are always happy to chat!**



**reports@appmagic.rocks**