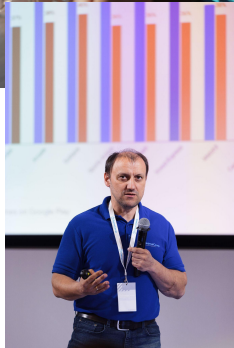


new! Quo vadis Gaming 2026?

2023 - 2025 (Key Insights and Data)



- Users in Gaming on different platforms
- The Attention Economy: Gaming vs. Other Leisure Spending
- Mobile Gaming Marketability
- Downloads and Revenue Concentration in Mobile Gaming
- Mobile Gaming vs Non-Gaming
- Mobile Gaming Growth (Android vs. iOS)
- Mobile Gaming Trends by Category (iOS & Android)
- Mobile Gaming Trends in Top Countries (iOS & Android)

Mariusz Gasiewski

<https://www.linkedin.com/in/MariuszGasiewski/>



Summary

1. Market Resilience and Cross-Platform Growth

- Sector Stability: Gaming—particularly mobile—shows no signs of slowing down; the industry continues to outperform previous growth estimates.
- User Depth: The proportion of "heavy users" is rising globally, signaling a highly engaged core audience.
- Cross-Platform Integration: Cross-device gaming is moving from a niche concept to a mainstream reality,

2. Business shifts

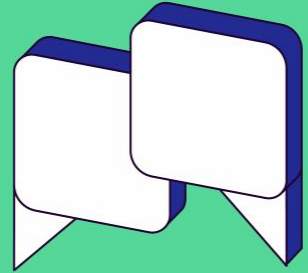
- Emerging markets are the primary drivers of user growth on both Android and iOS
- Revenue remains heavily concentrated in Western markets, despite emerging markets driving volume
- iOS Dominance in UA: Despite Android's global footprint, iOS continues to command a disproportionately high share of User Acquisition (UA) spend in many regions.

3. Competition and Monetization Trends

- Games must compete against a wide range of digital entertainment for user time and money.
- Revenue Concentration: The mobile sector has seen a significant "winner-take-all" trend, with revenue becoming increasingly concentrated among top-tier titles over the last few years.
- Diversification: Non-gaming app categories are experiencing robust growth, capturing a larger share of the overall mobile market.



Gaming vs users



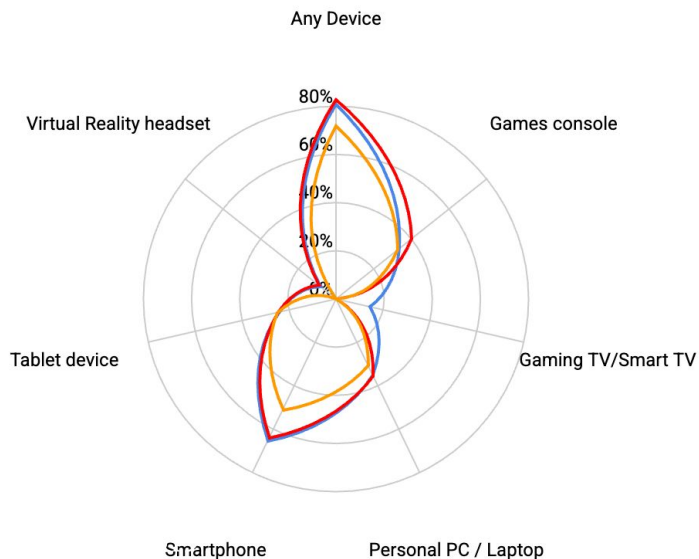
Penetration of mobile
gaming is still growing



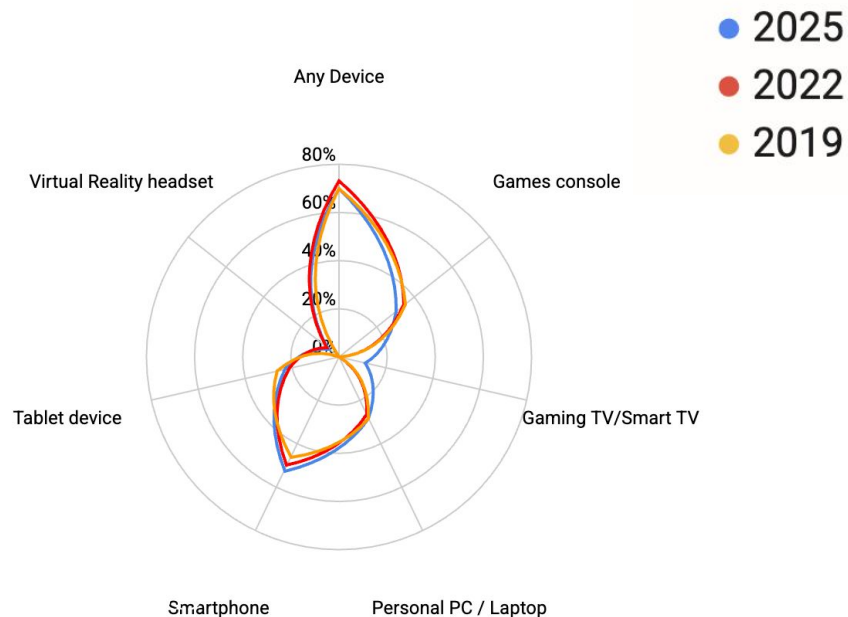
There is no danger that gaming and mobile gaming will go away.

Which of these devices do you use to play games?

US



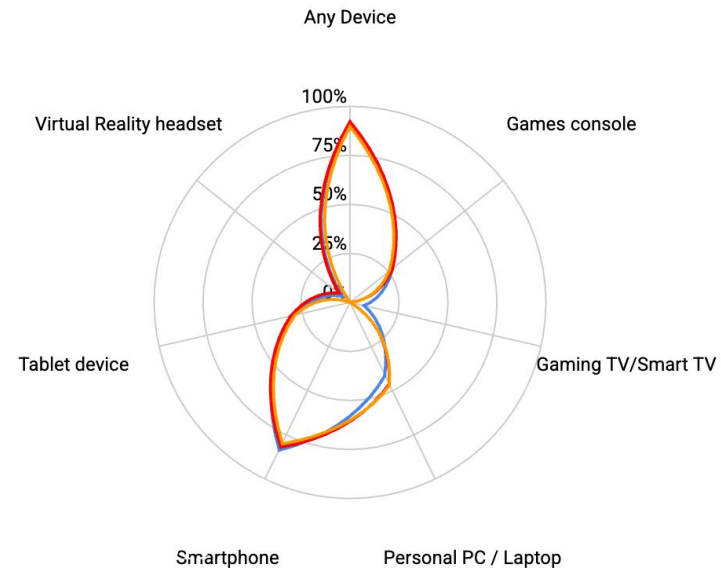
UK



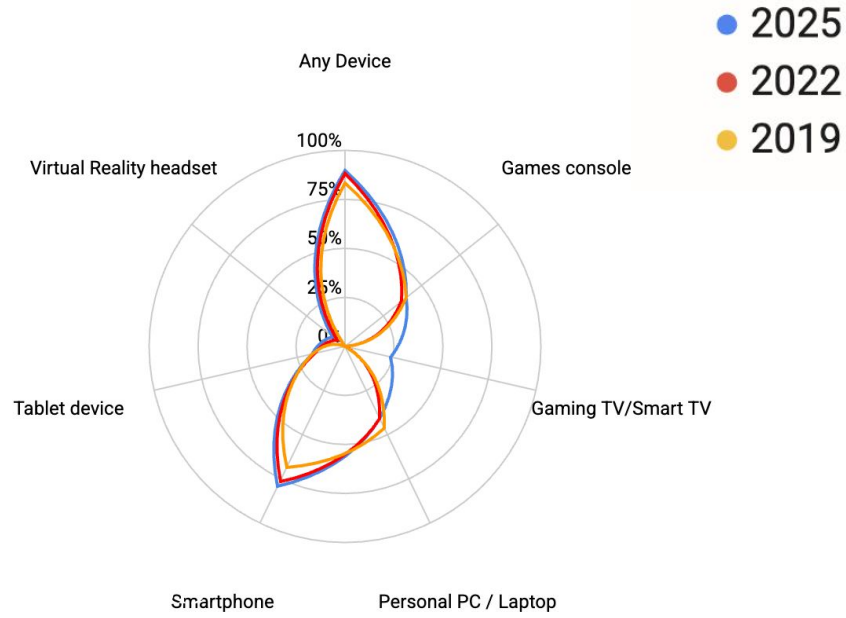
Using of smartphones for playing games is still increasing

Which of these devices do you use to play games?

TR



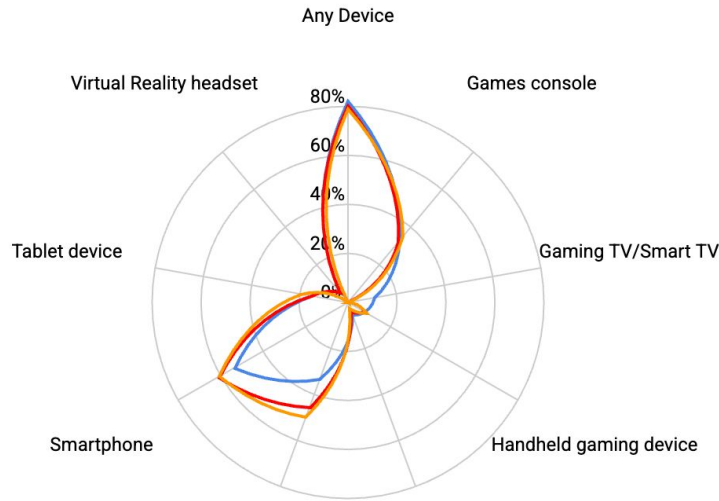
BR



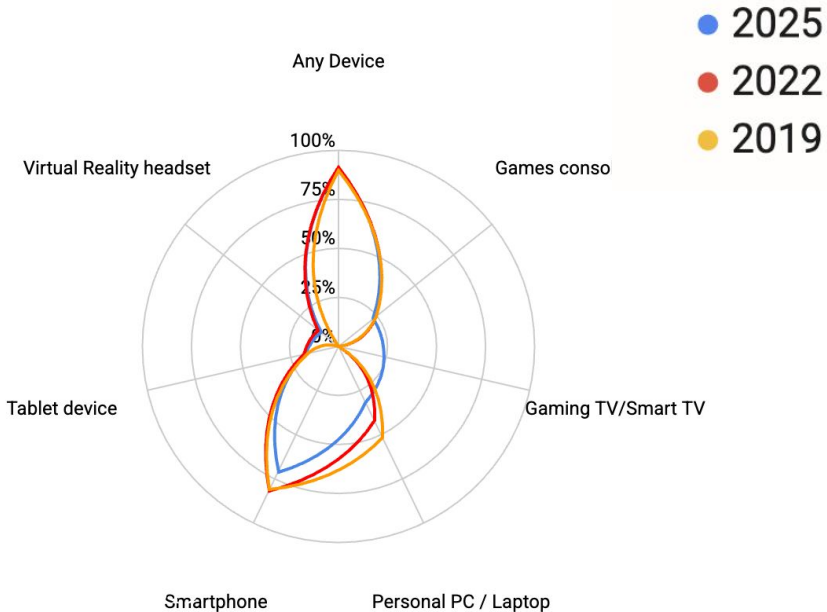
...However, that growth is moderating because adoption rates are already very high.

Which of these devices do you use to play games?

PL



IN



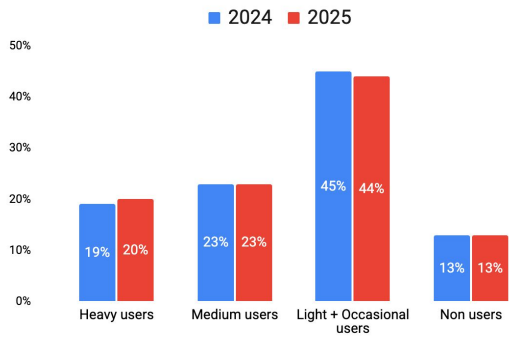
Share of heavy users in games
is growing in many countries



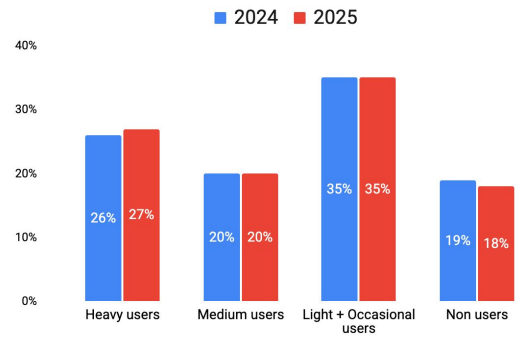
Share of Heavy Users in Games is Growing Across Key Countries

Share of specific audiences among internet users 16-64 for Mobile games

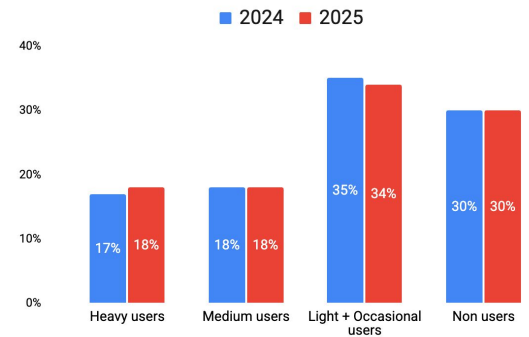
Global



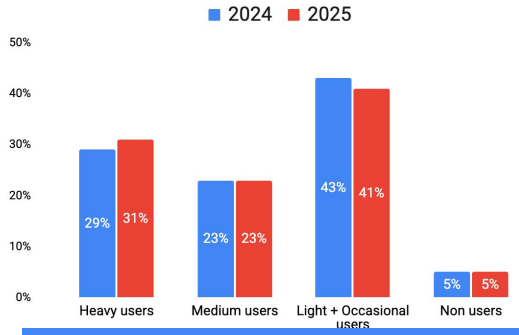
US



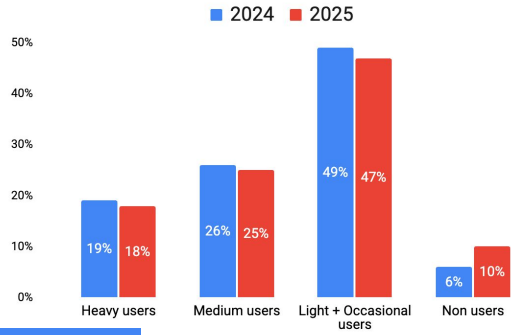
UK



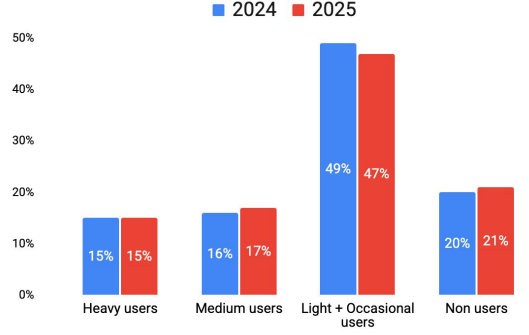
Brazil



India



South Korea



This Effect is Less Intense for PC/Console Games

Share of specific audiences among internet users 16-64 for PC/Console games



Source: GWI, Q1-Q3 2025, share of the audience among internet users, 16-64

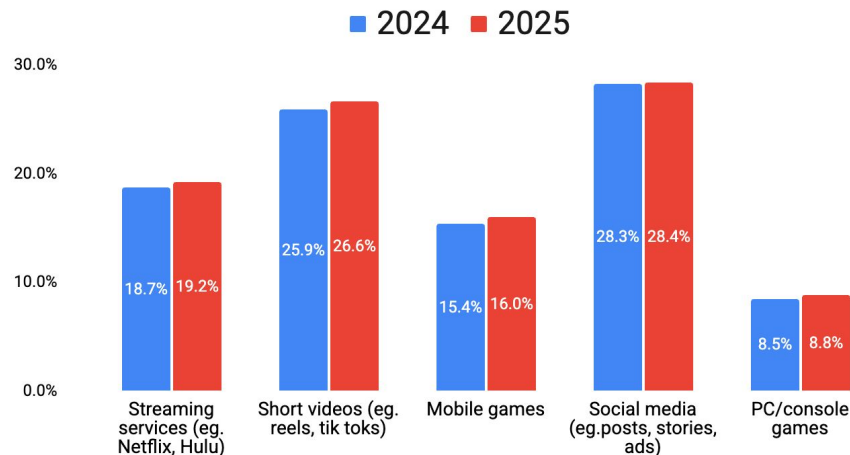
At the Same Time, Games Must
Compete for Attention with
Other Leisure Activities



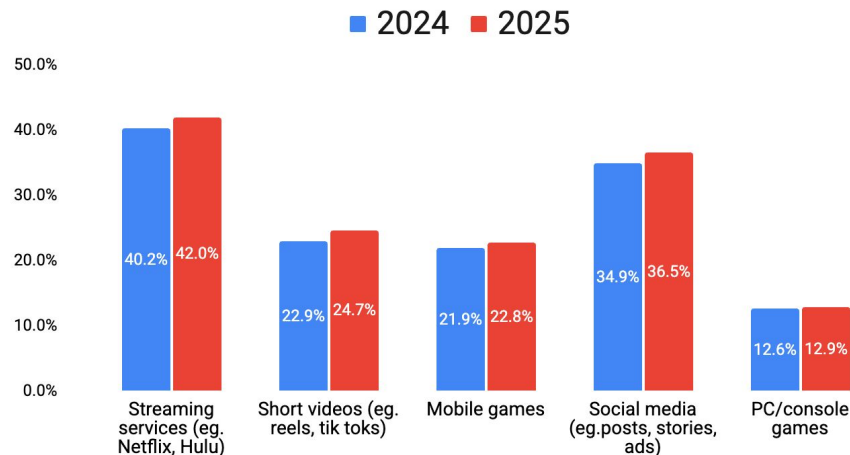
Users spend a lot of time watching streaming services or short videos

Hours spent last week with specific medium

Worldwide



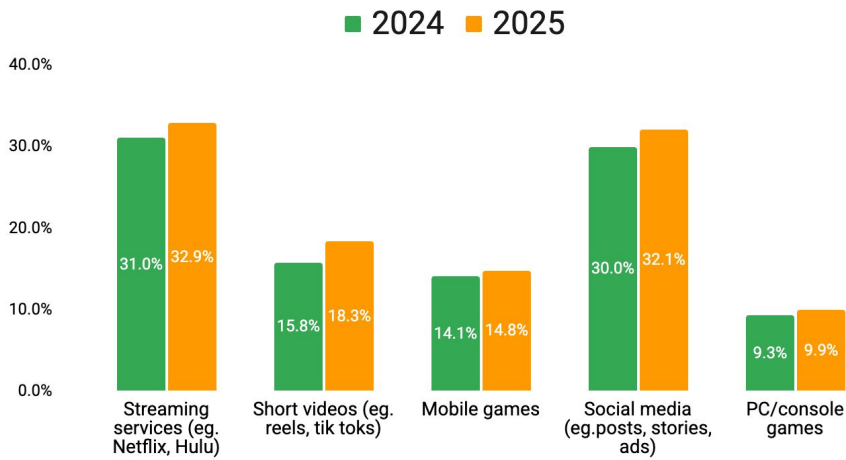
US



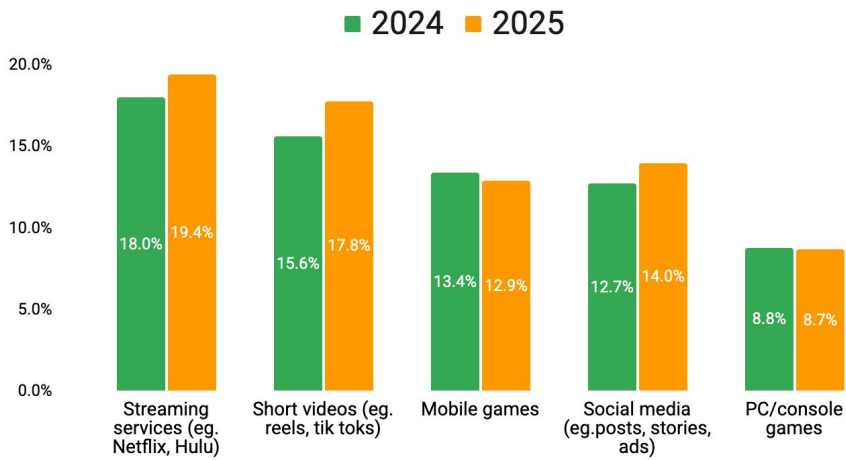
We see this trend in Western Markets...

Hours spent last week with specific medium

UK



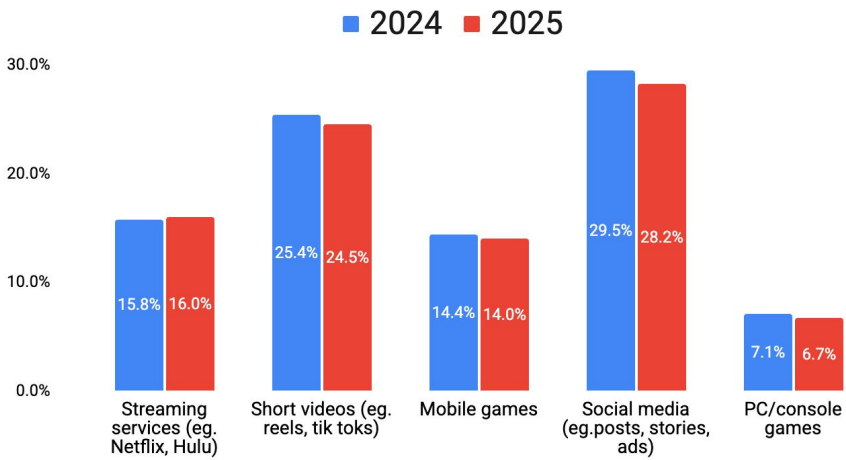
South Korea



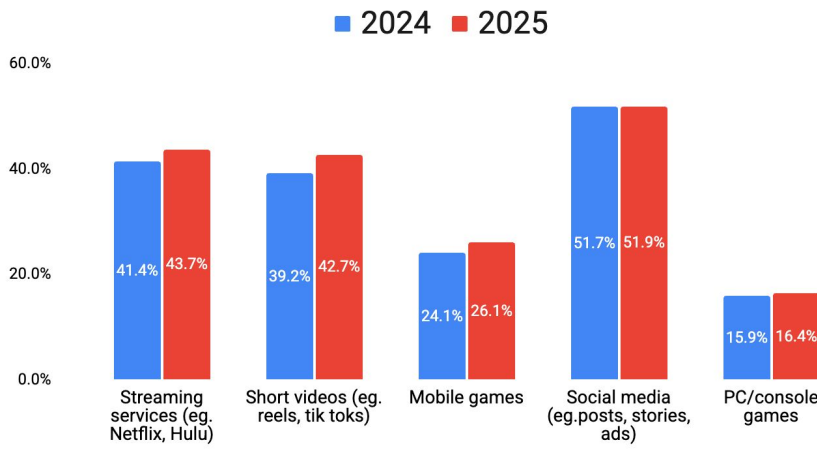
...and in Emerging Markets

Hours spent last week with specific medium

India



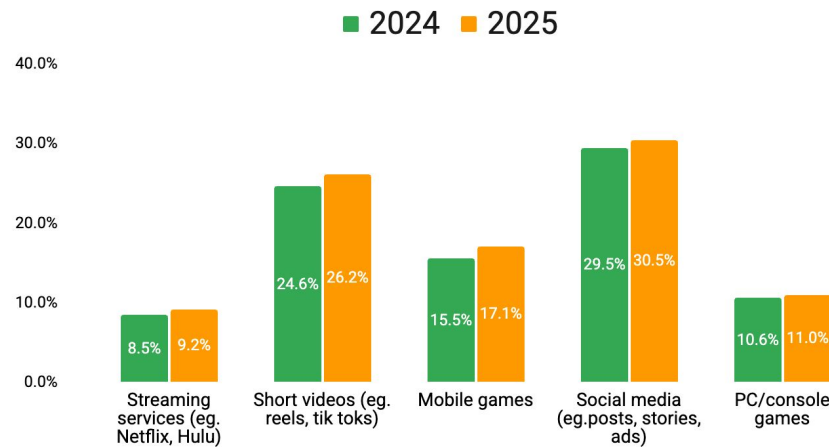
Brazil



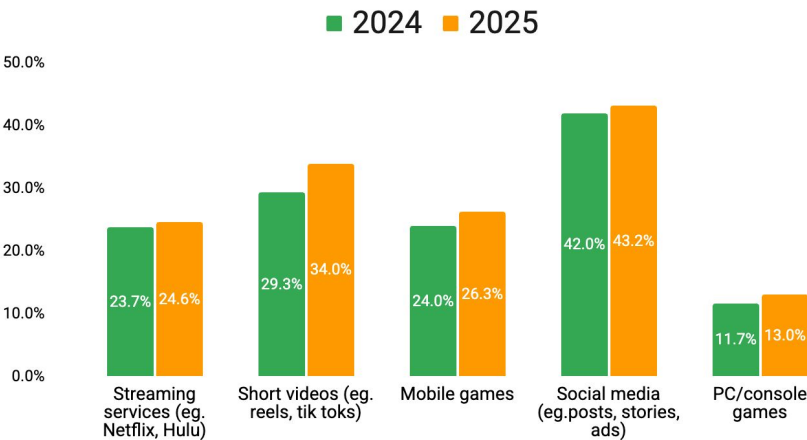
Users spend a lot of time watching streaming services or short videos

Hours spent last week with specific medium

Vietnam



Turkey

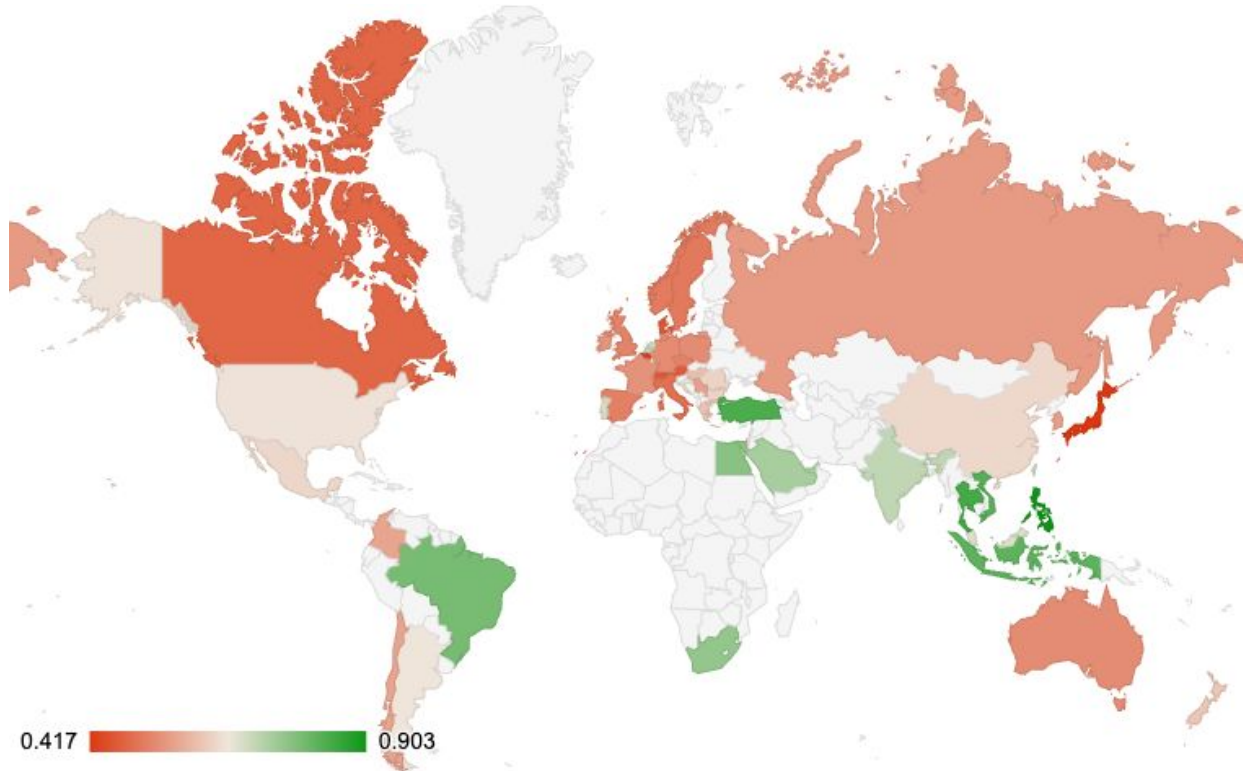


Emerging Markets Will Be the Key Drivers of Mobile Gaming Growth



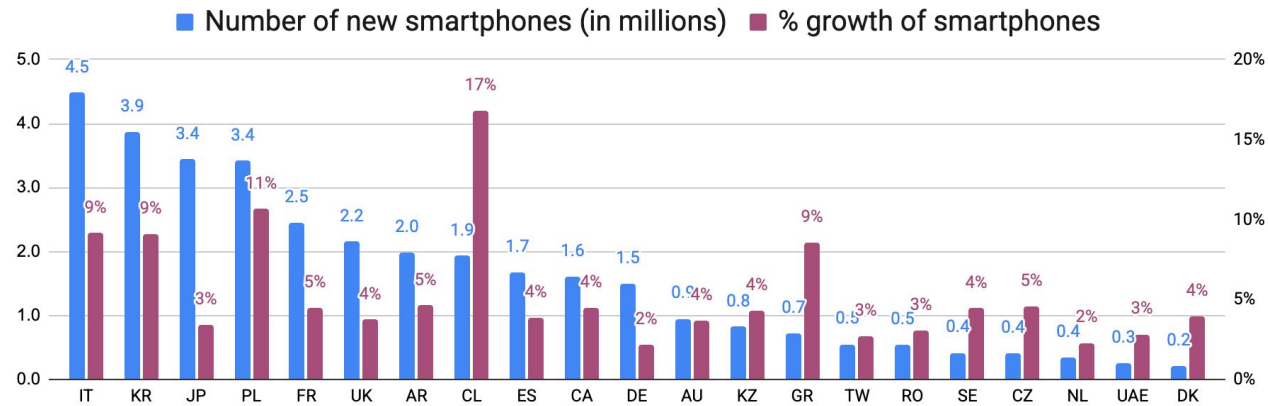
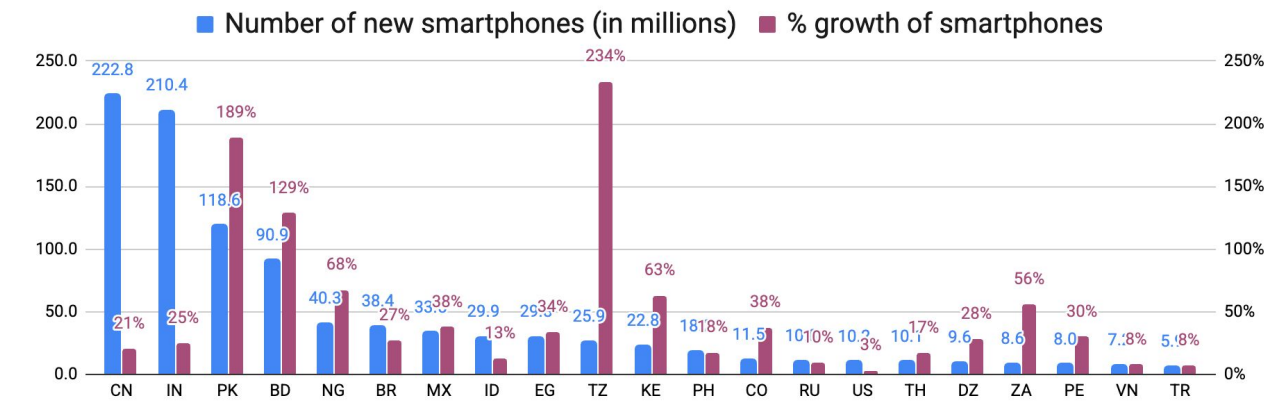
Mobile gaming dominates non-Western markets.

Share of internet user who use smartphones to play games



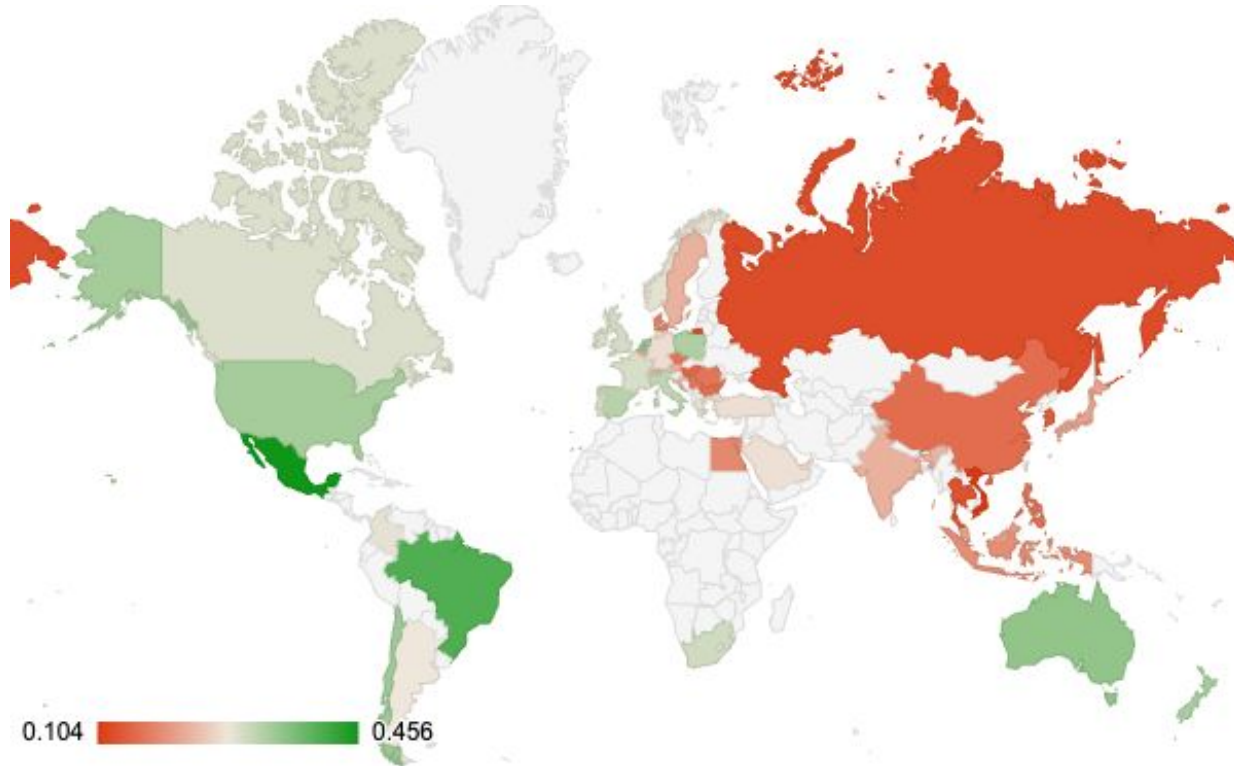
Western markets have very low growth of new smartphones

(net new smartphones and its growth between 2025 and 2029)



Consoles are especially popular in Western countries

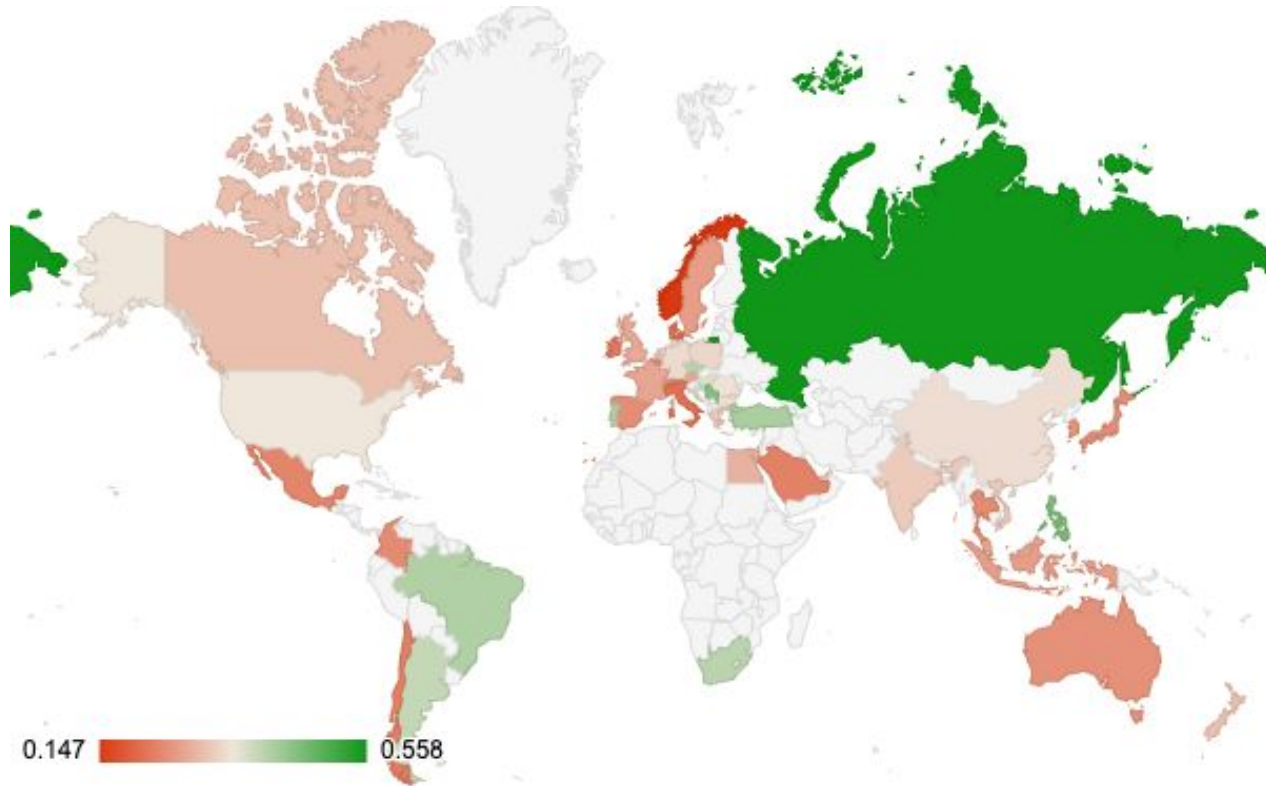
Share of internet user who use consoles to play games



Source: GWI, Q1-Q3 2025

...while PC gaming is popular in Europe and Latin America

Share of internet user who use personal PC / laptop to play games



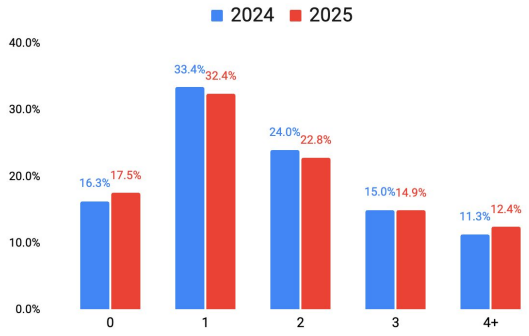
Gaming on many devices is
becoming real thing



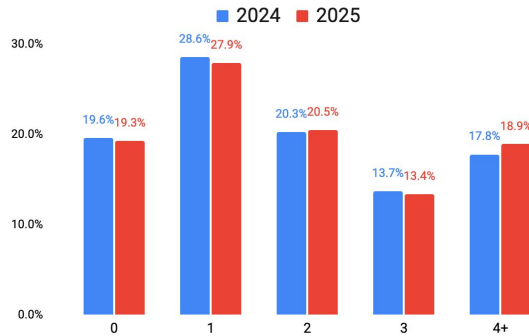
Share of users playing on many devices is growing

Number of gaming devices used for playing

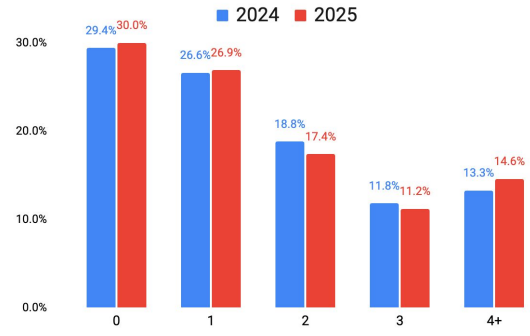
Global



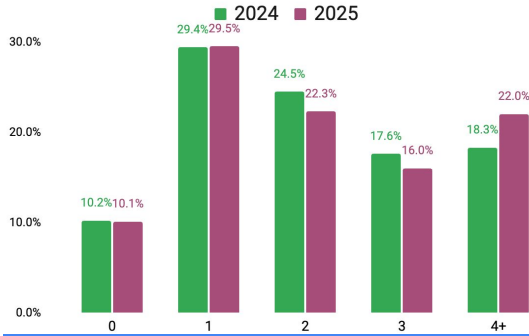
US



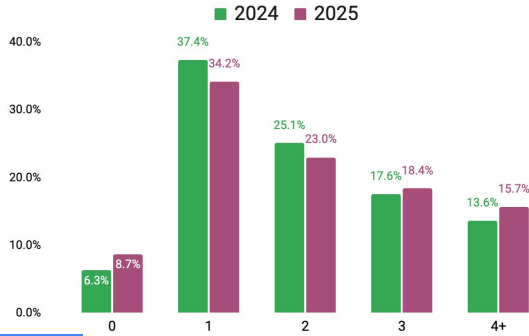
UK



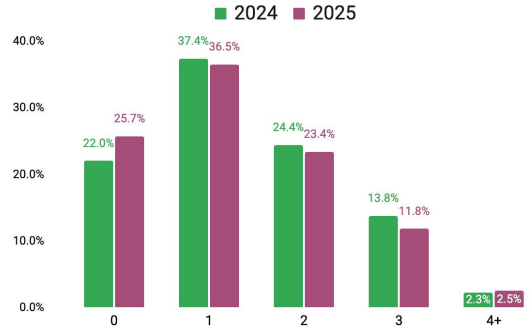
Brazil



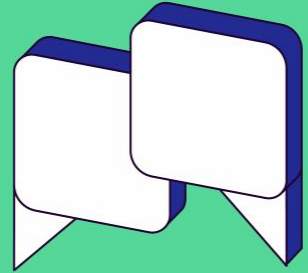
India



South Korea



Business in games

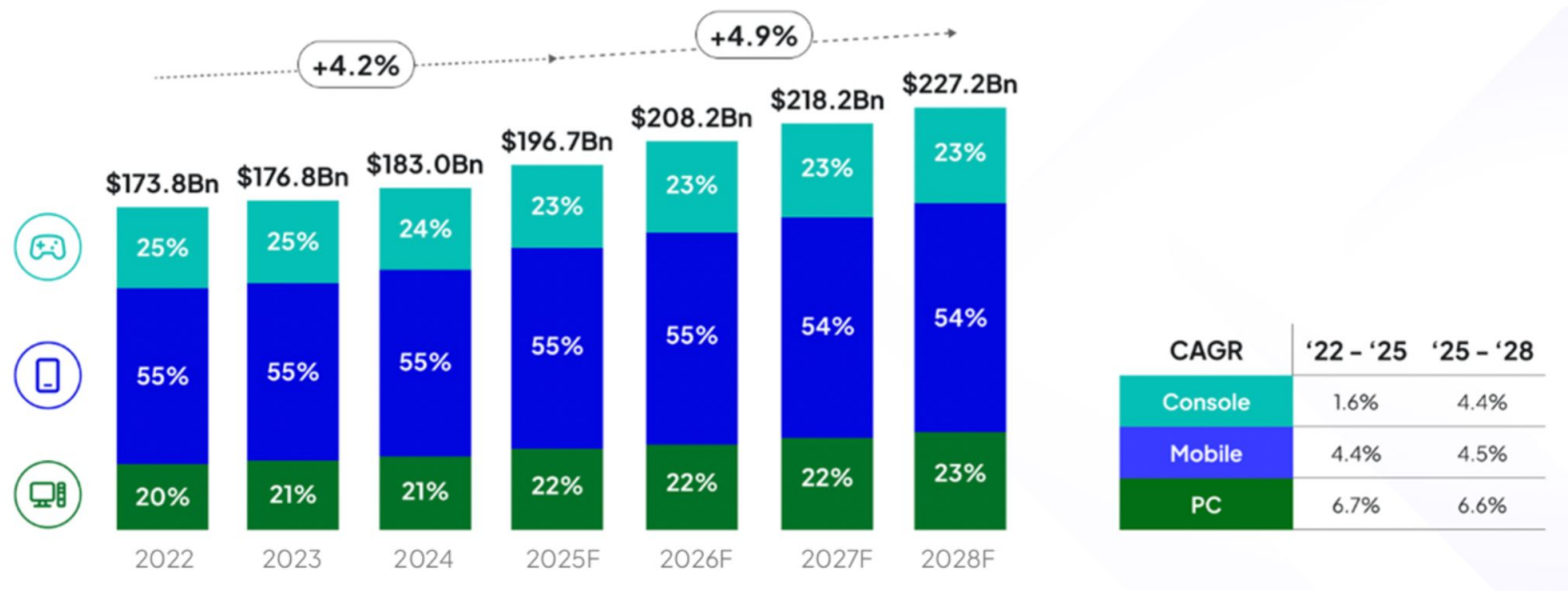


Games industry exceeded
previous estimates

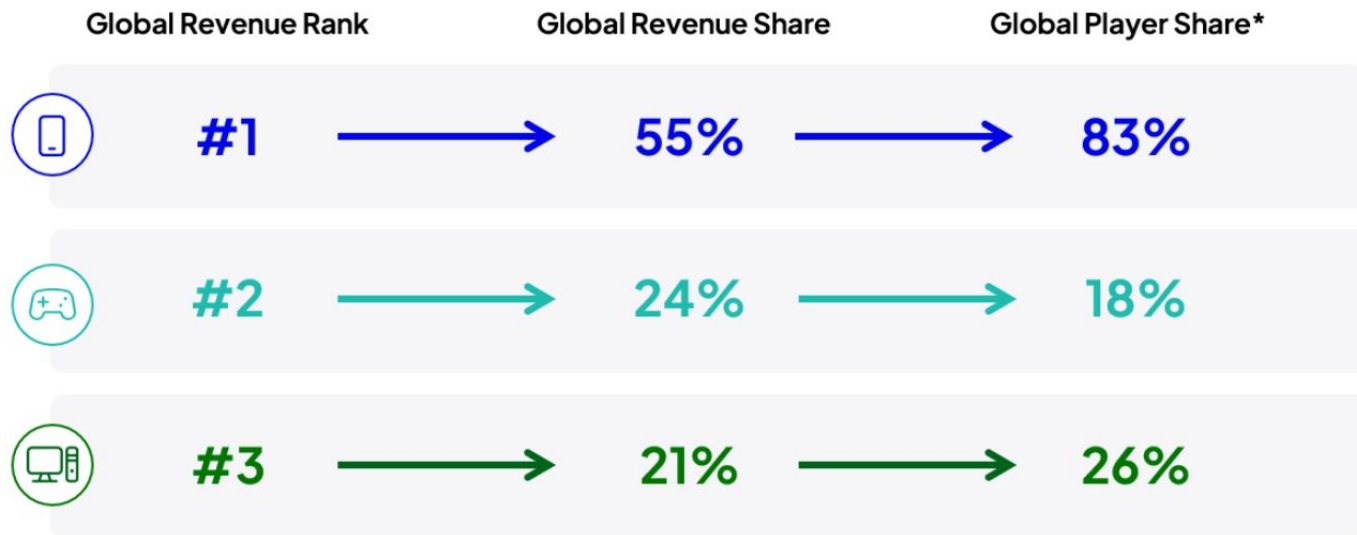


Gaming revenue in 2025 (estimates)

According to the newest Newzoo data release, the value of the global gaming industry is \$197 billion in 2025. This 7.5% annual growth exceeds previous estimates, fueled primarily by stronger-than-anticipated momentum in mobile and PC gaming



Mobile is responsible for lion's share of players and over 50% of total revenue

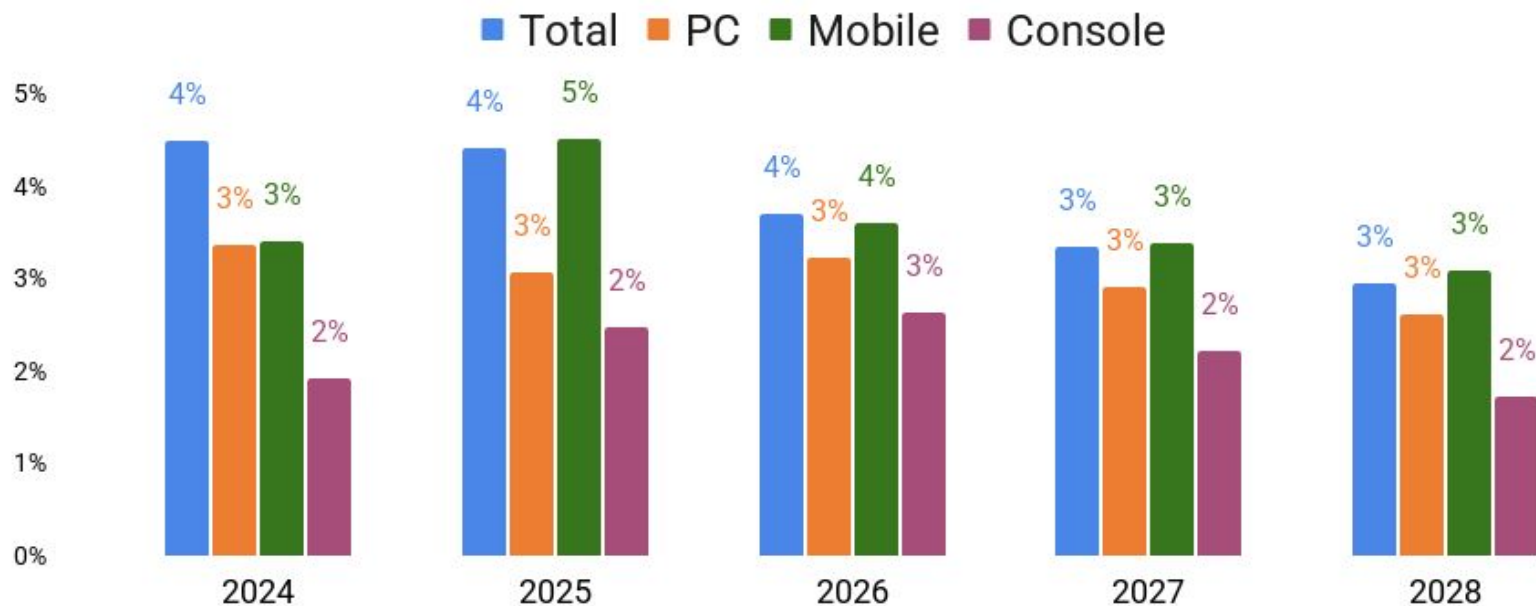


* Totals exceed 100% because many players engage across multiple platforms.



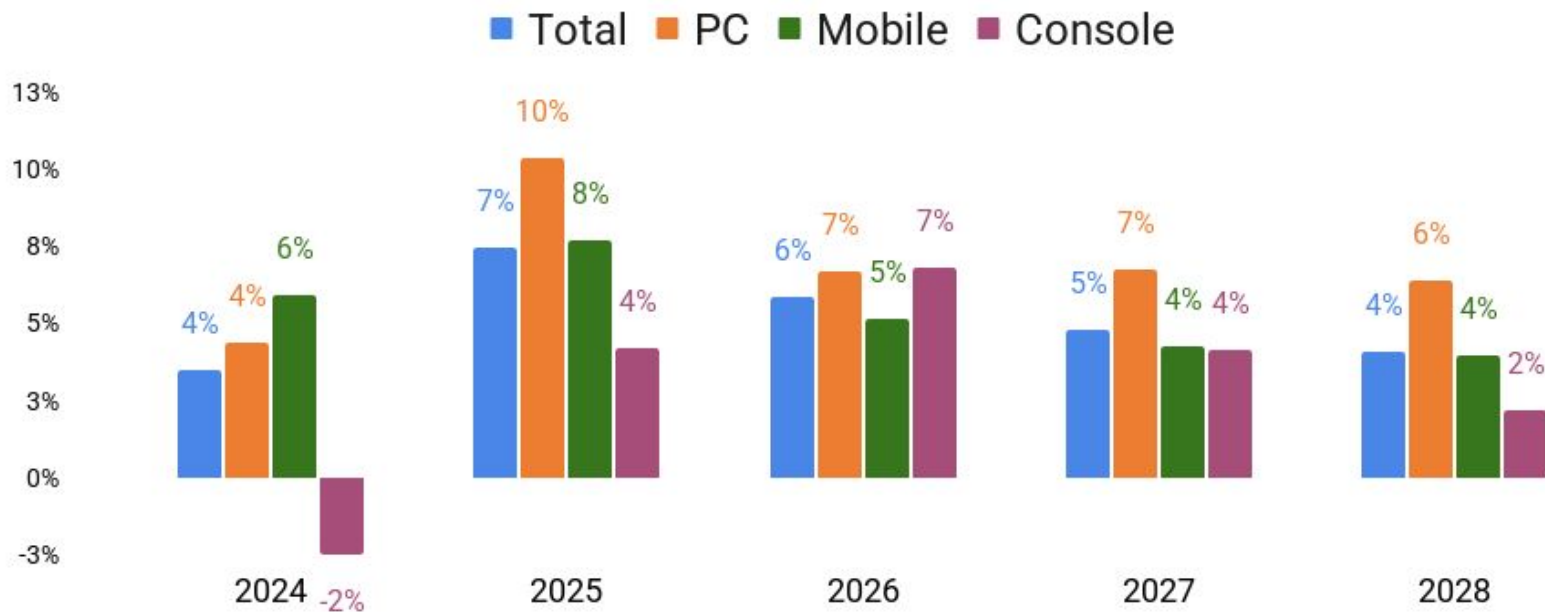
Majority of user's growth in games will be coming from Mobile

Players growth in different regions (Newzoo estimates)



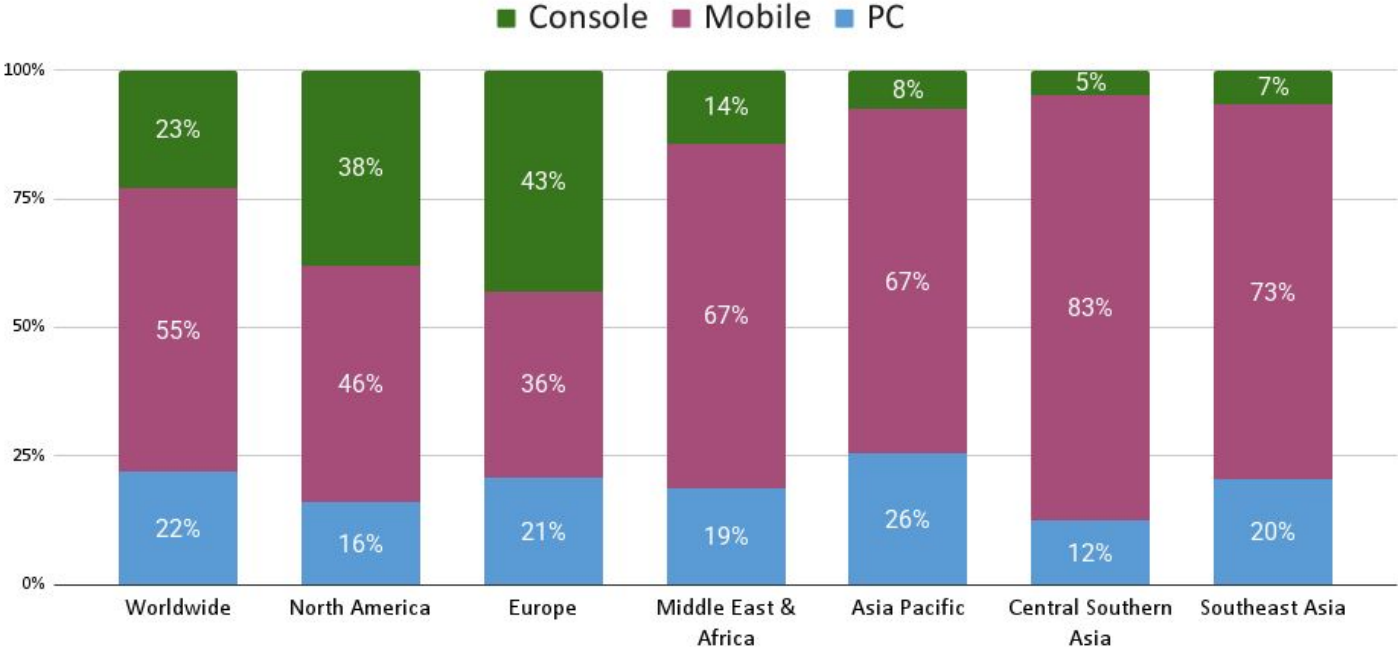
All types of gaming will have some revenue growth in the next years

Revenue growth in different regions (Newzoo estimates)



Significant regional differences in gaming revenue share by device

Revenue share by devices in different regions

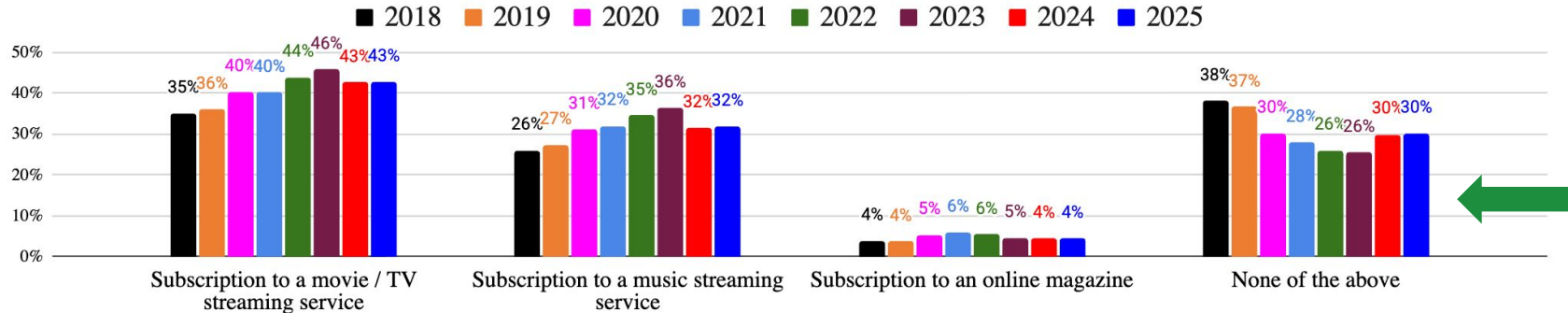
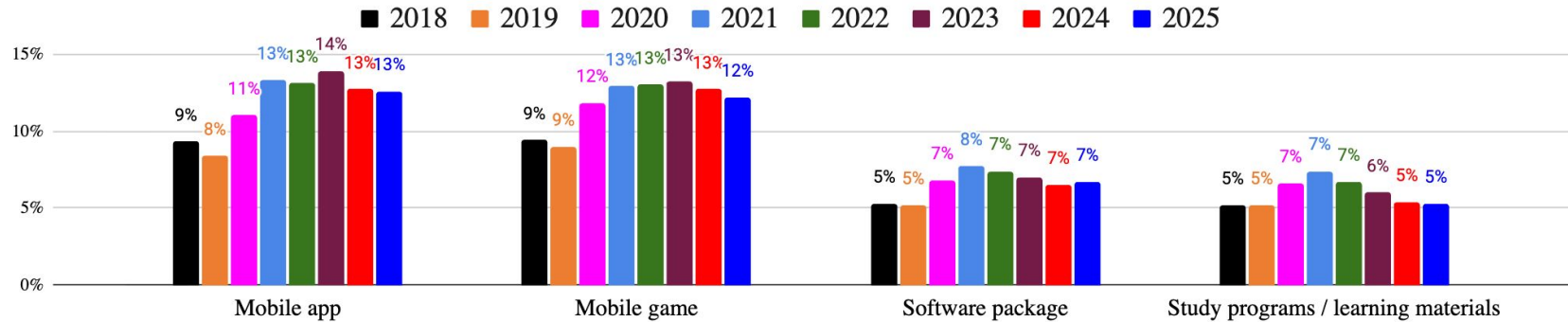


Strong competition for user
spending, including gaming



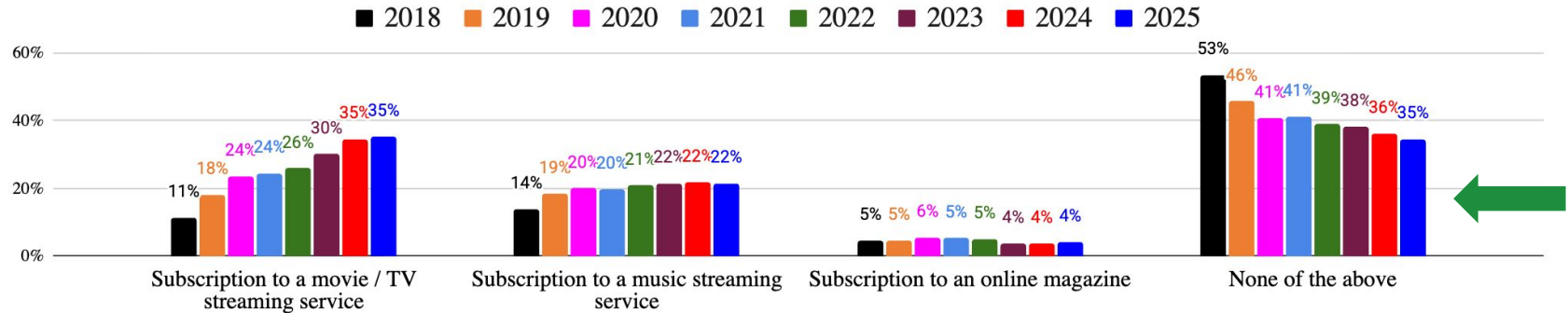
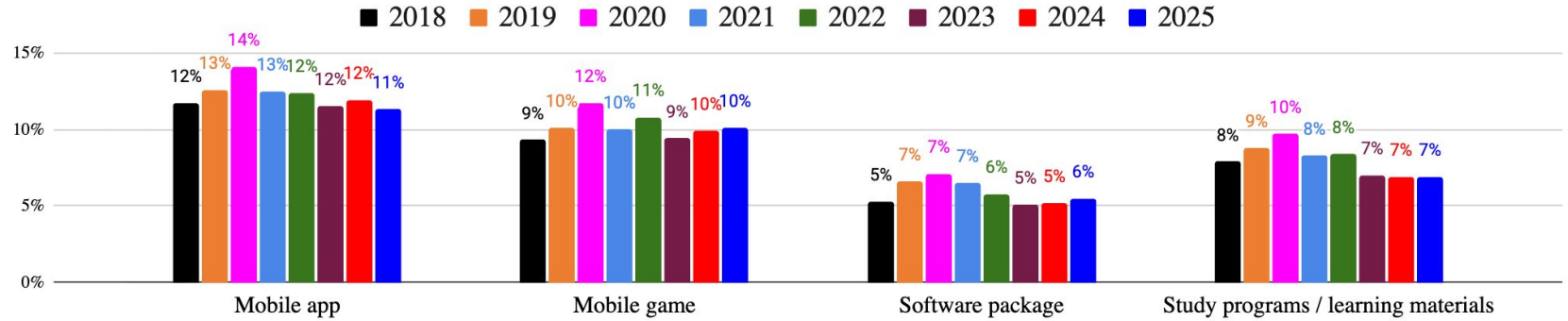
Fierce competition for user spending...(internet users, US)

In the last month, which of these have you paid for?



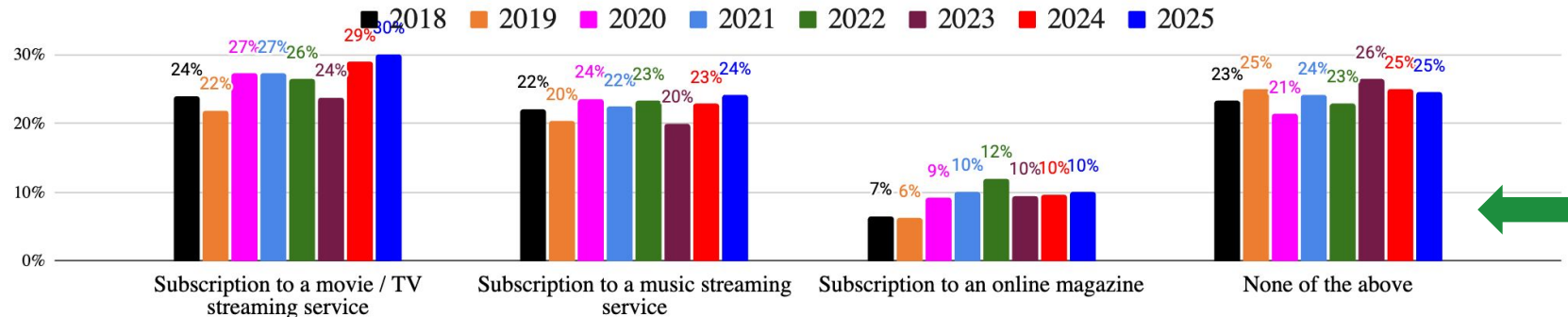
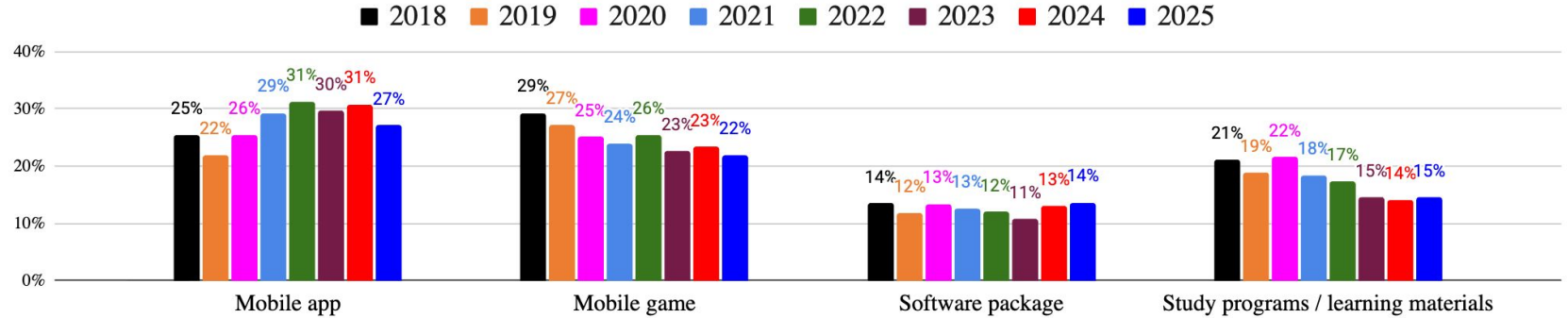
Fierce competition for user spending...(internet users, PL)

In the last month, which of these have you paid for?



Fierce competition for user spending...(internet users, VN)

In the last month, which of these have you paid for?

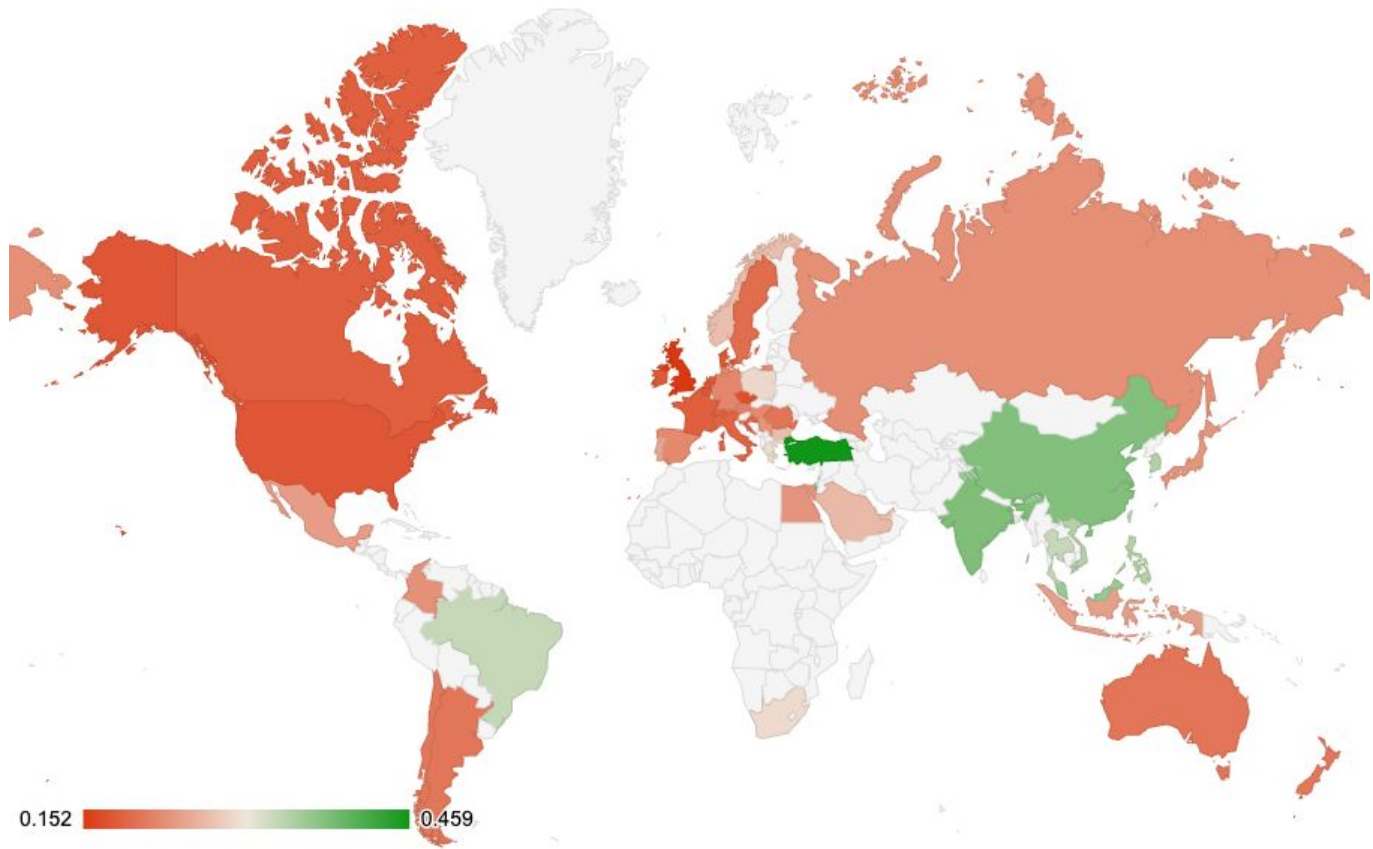


User perception of AI: potential opportunities for gaming



Users from Emerging Markets see more benefits coming from AI

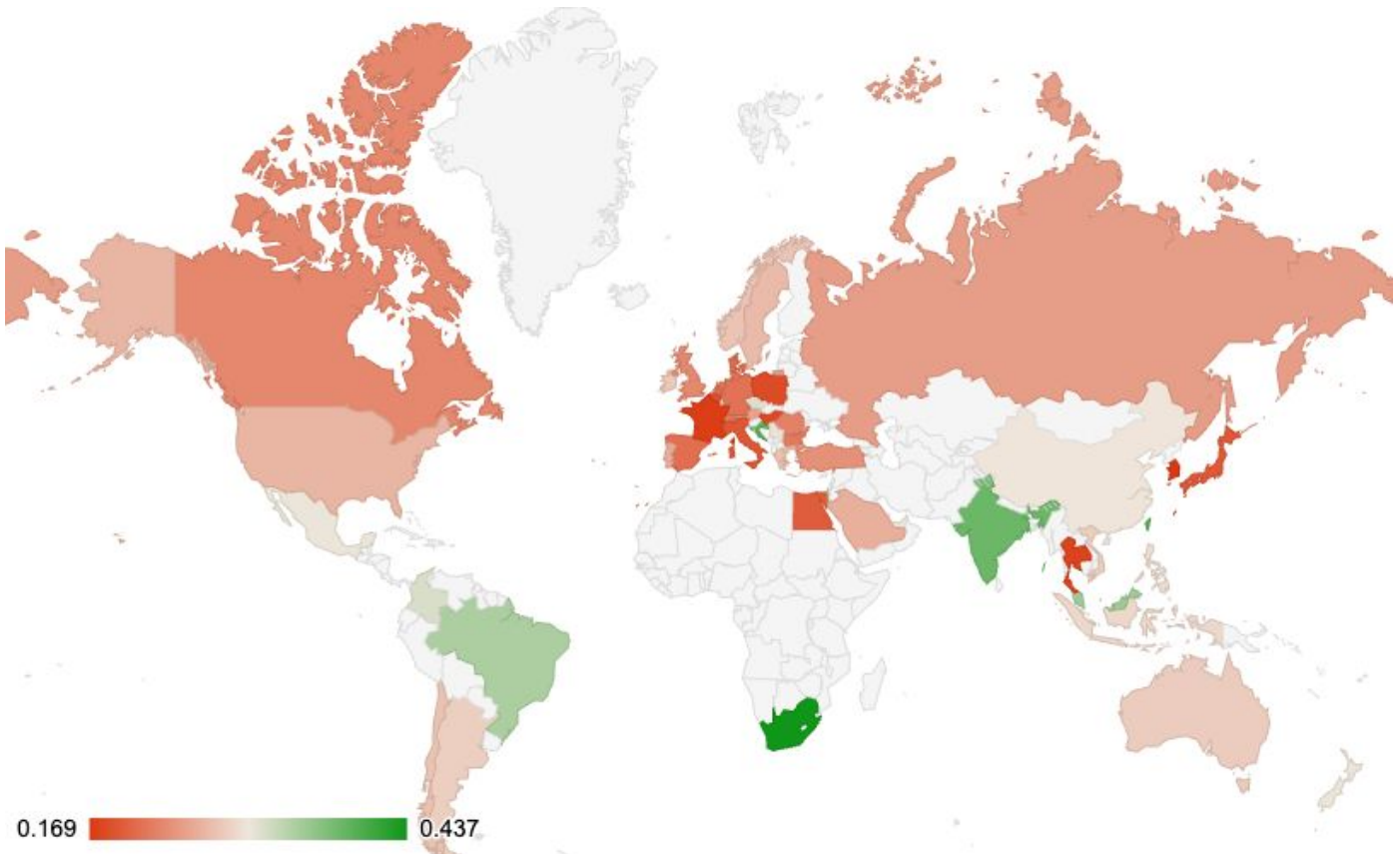
AI enhances my daily life



Source: GWI, 2025

...and feel more comfortable using AI products and services

I am comfortable using AI products and services

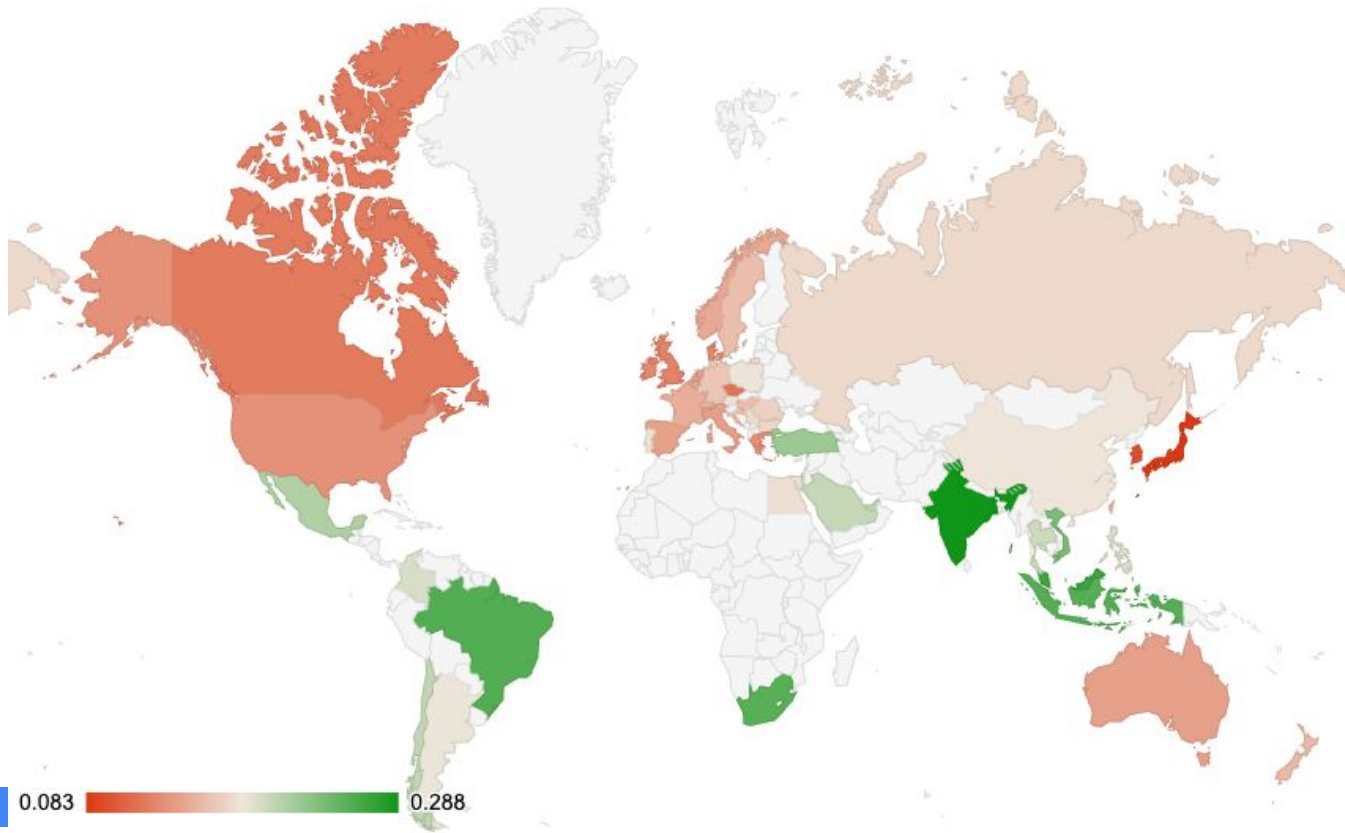


Source: GWI, 2025



Most of people do not believe that AI-generated content can be of high quality, even with minimum or no human input

AI-generated content can be of high quality, even with minimum or no human input

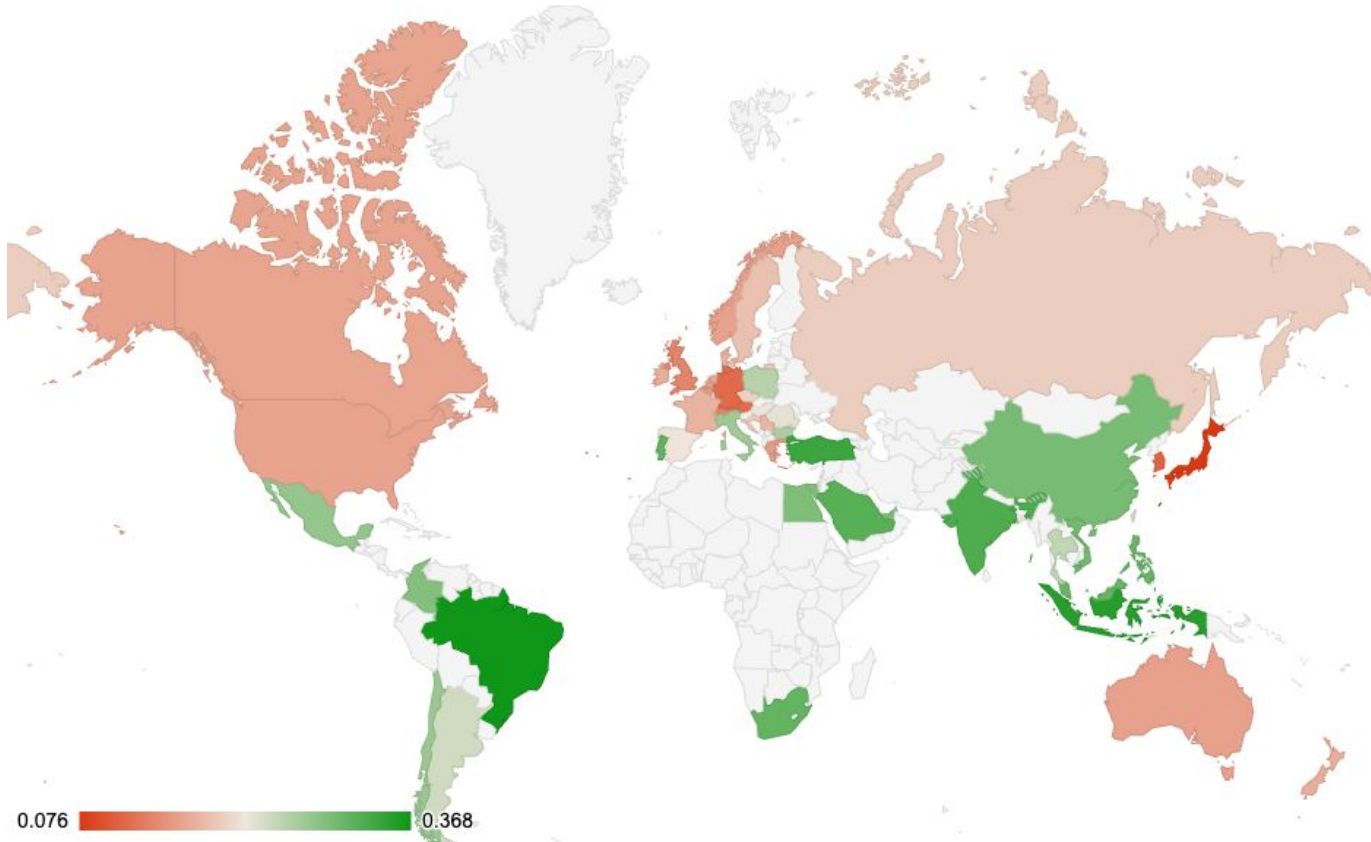


Source: GWI, 2025

0.083 0.288

There are many people who believe that AI can be developed ethically

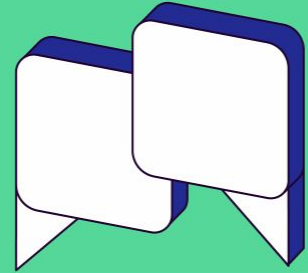
I am confident AI can be developed ethically



Source: GWI, 2025

0.076 0.368

Mobile gaming - overview

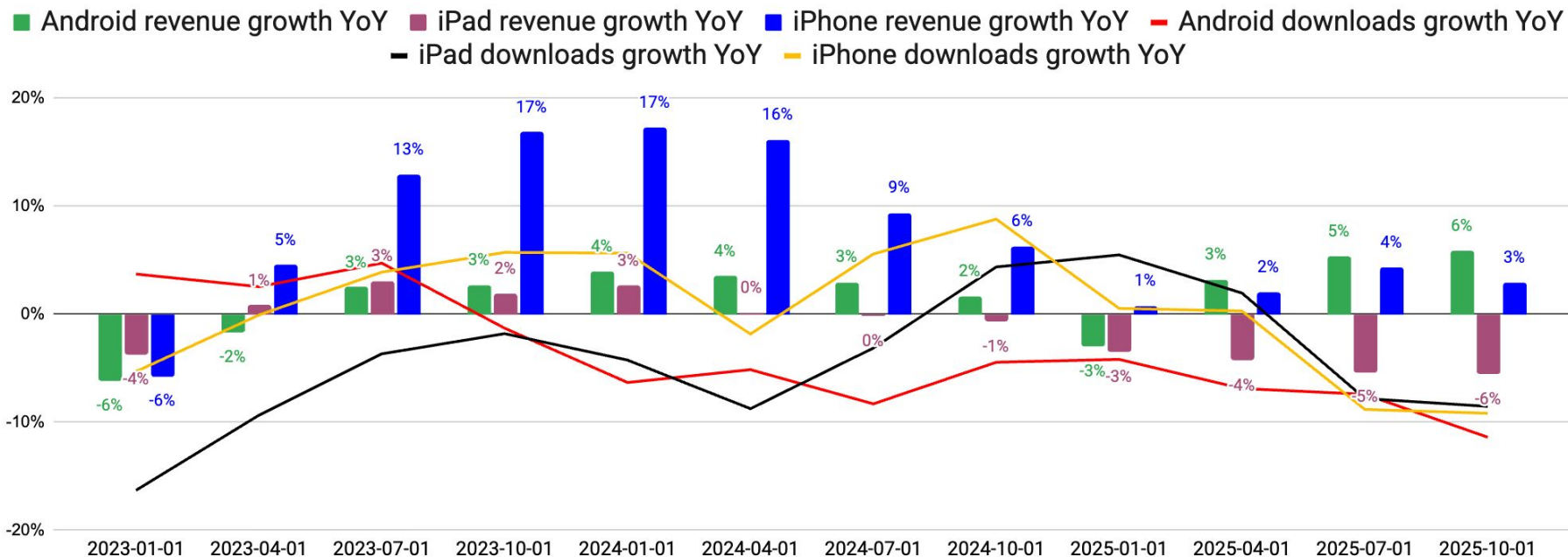


Mobile gaming revenue
growth has improved over
the past few quarters



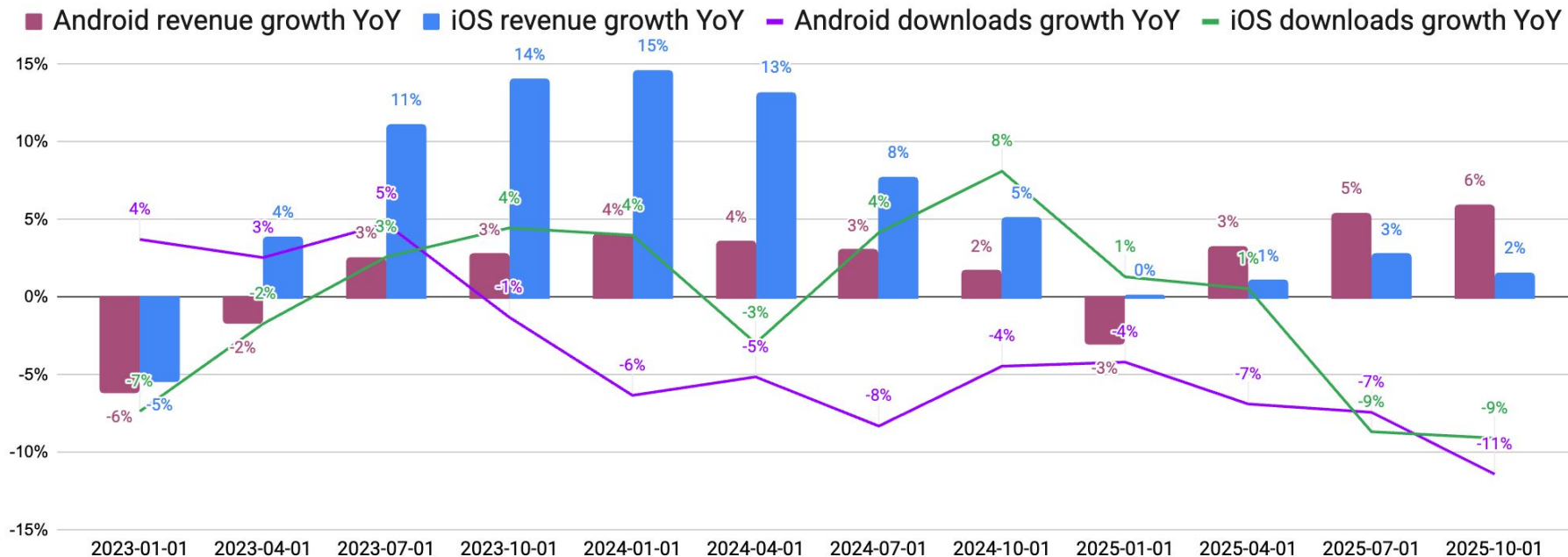
Mobile gaming revenue growth has accelerated over recent quarters

Growth of revenue and downloads in mobile gaming



Mobile gaming revenue growth has accelerated over recent quarters

Growth of mobile gaming

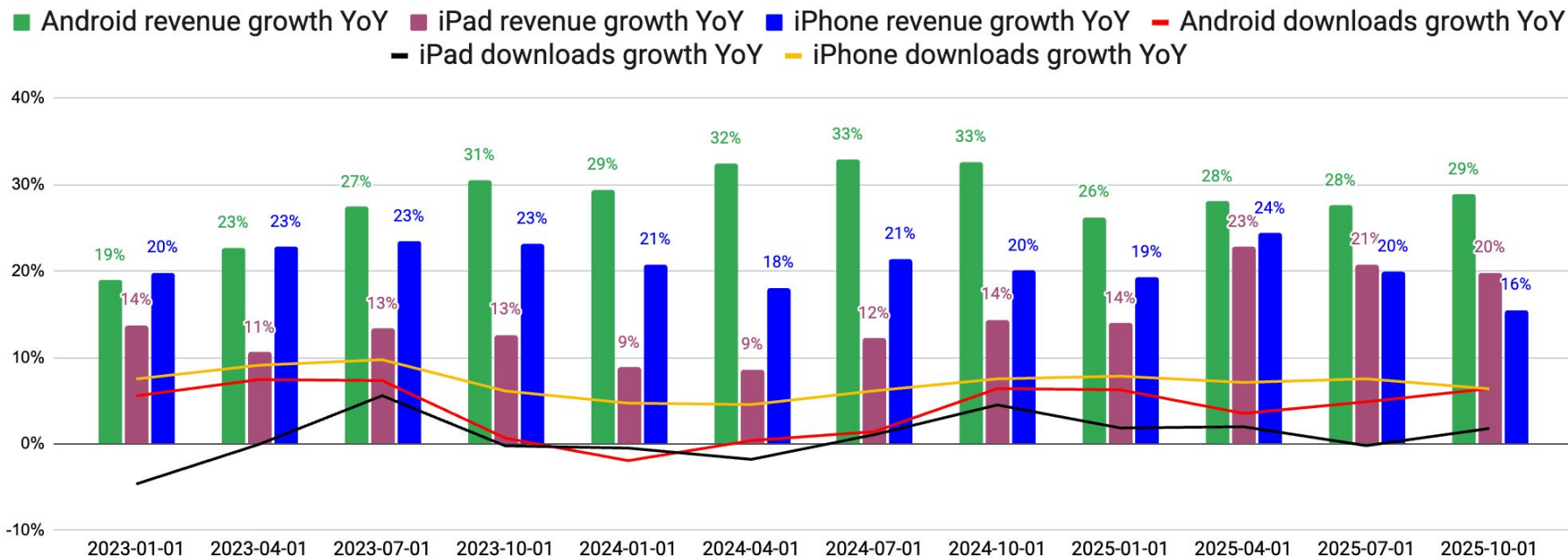


Non-gaming app categories
saw robust growth and
increased market share



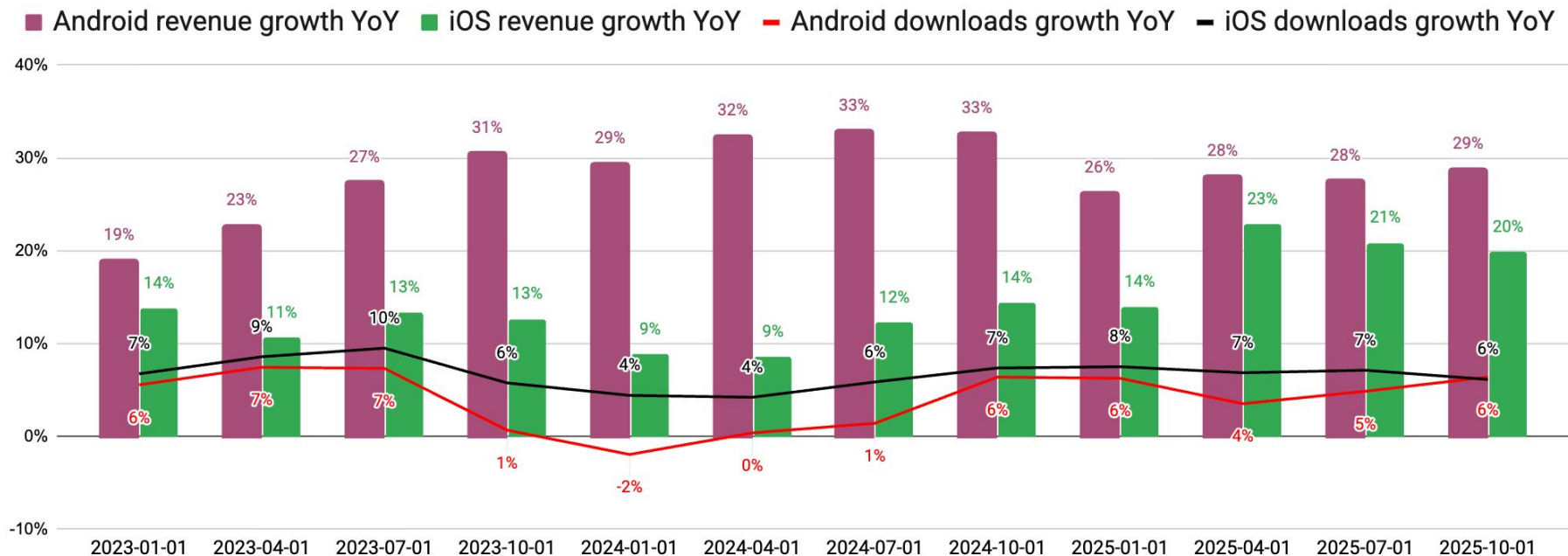
Non-Gaming growth rates significantly outpaced gaming growth

Growth of revenue and downloads in non-gaming apps categories



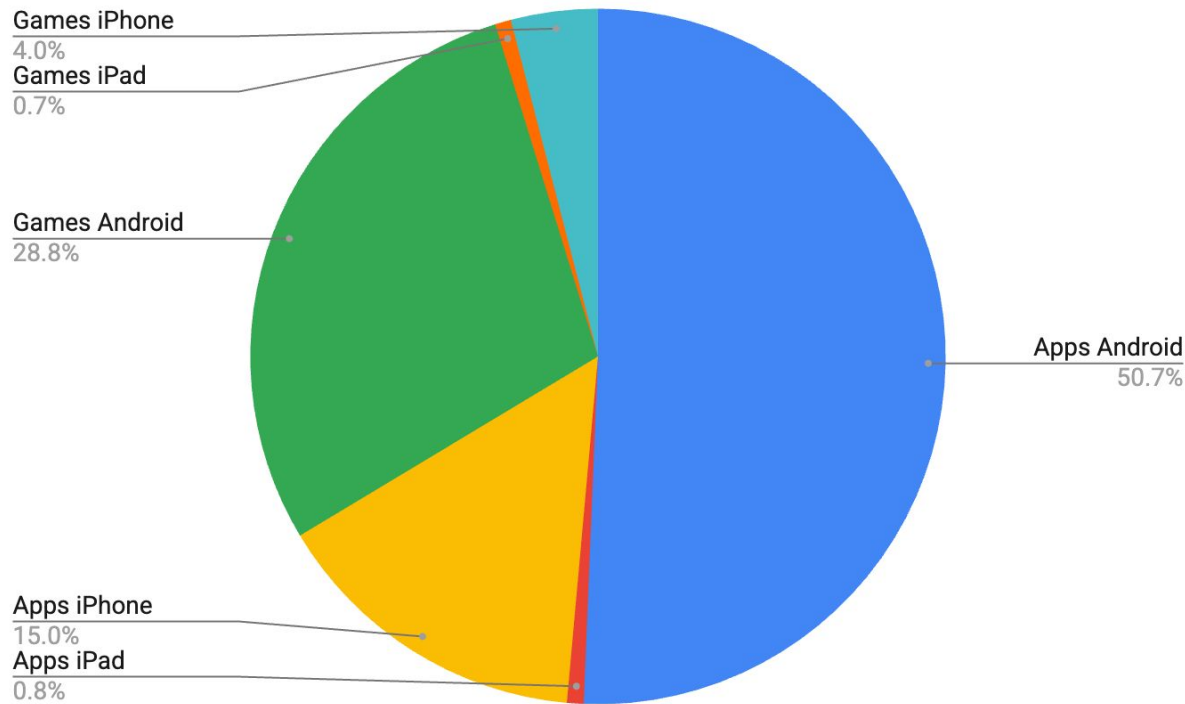
Non-Gaming growth rates significantly outpaced gaming growth

Growth of revenue and downloads in non-gaming apps categories



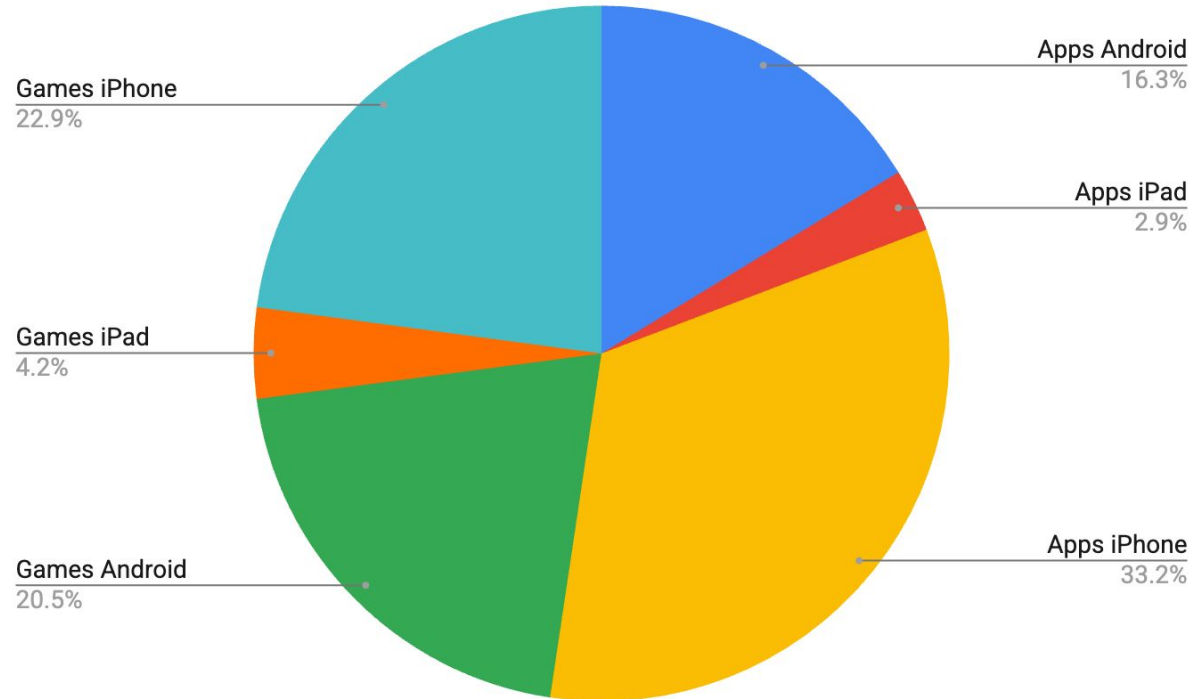
Downloads are higher in non-gaming than in gaming

Share of downloads in different apps segments



...and revenue share shows a similar trend

Share of revenue in different apps segments

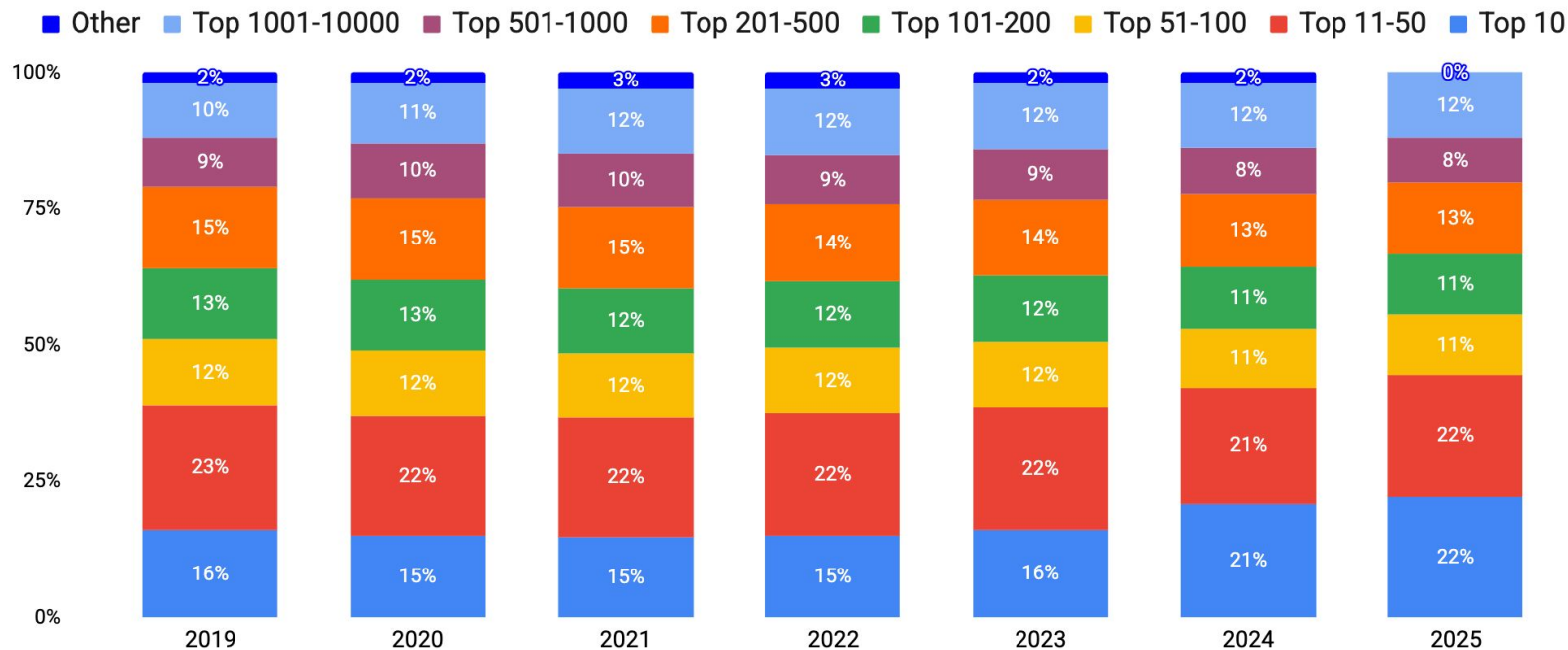


Entry to the industry is becoming even more challenging over the years (both in gaming and non-gaming)



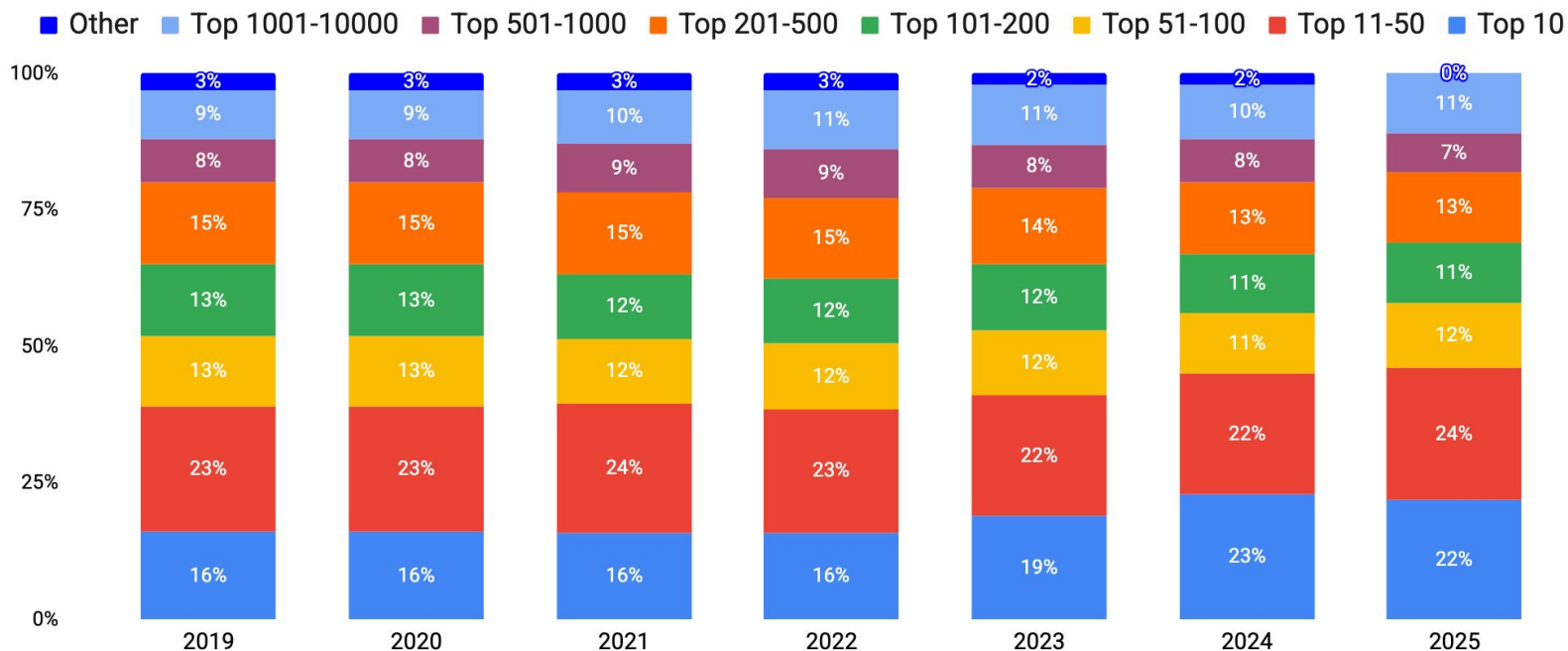
Revenue concentration in mobile gaming grew significantly over the last years

Concentration of mobile gaming revenue (Google Play)



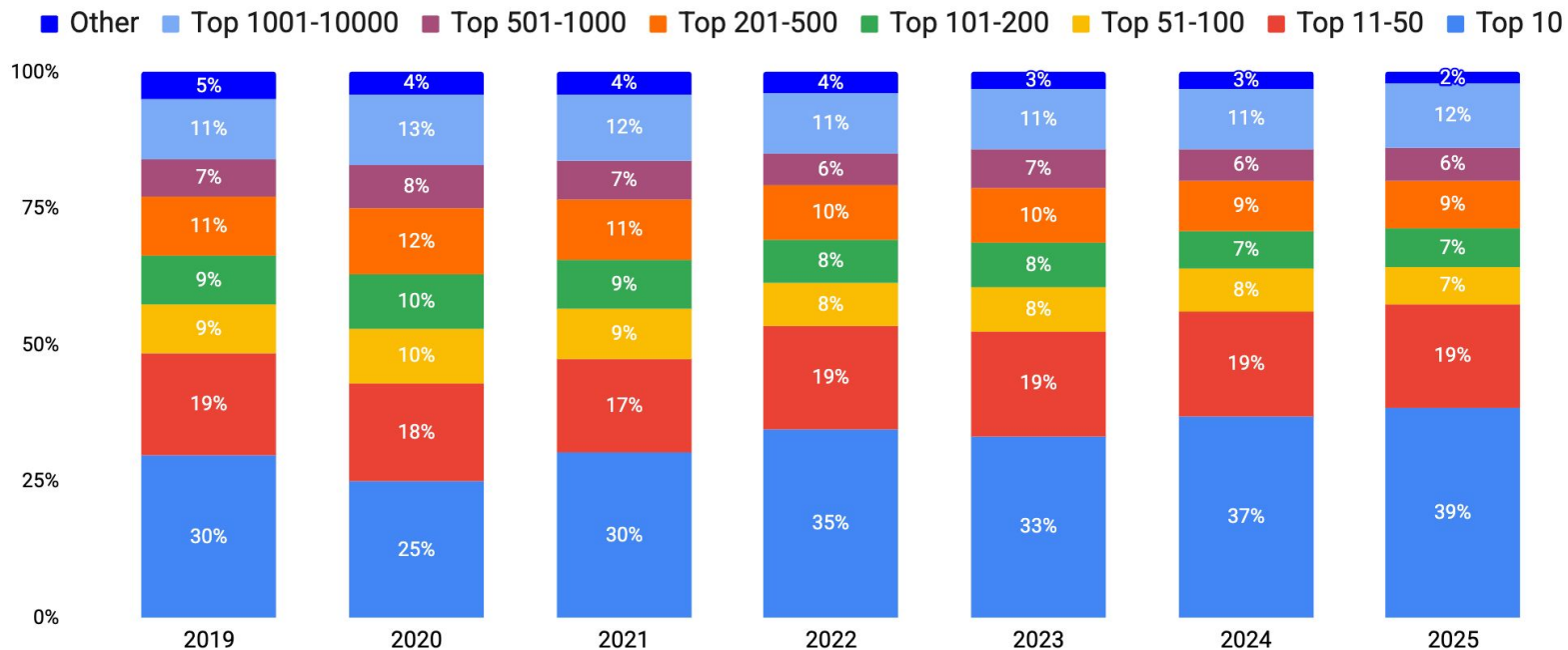
Revenue concentration in mobile gaming grew significantly over the last years

Concentration of mobile gaming revenue (iOS)



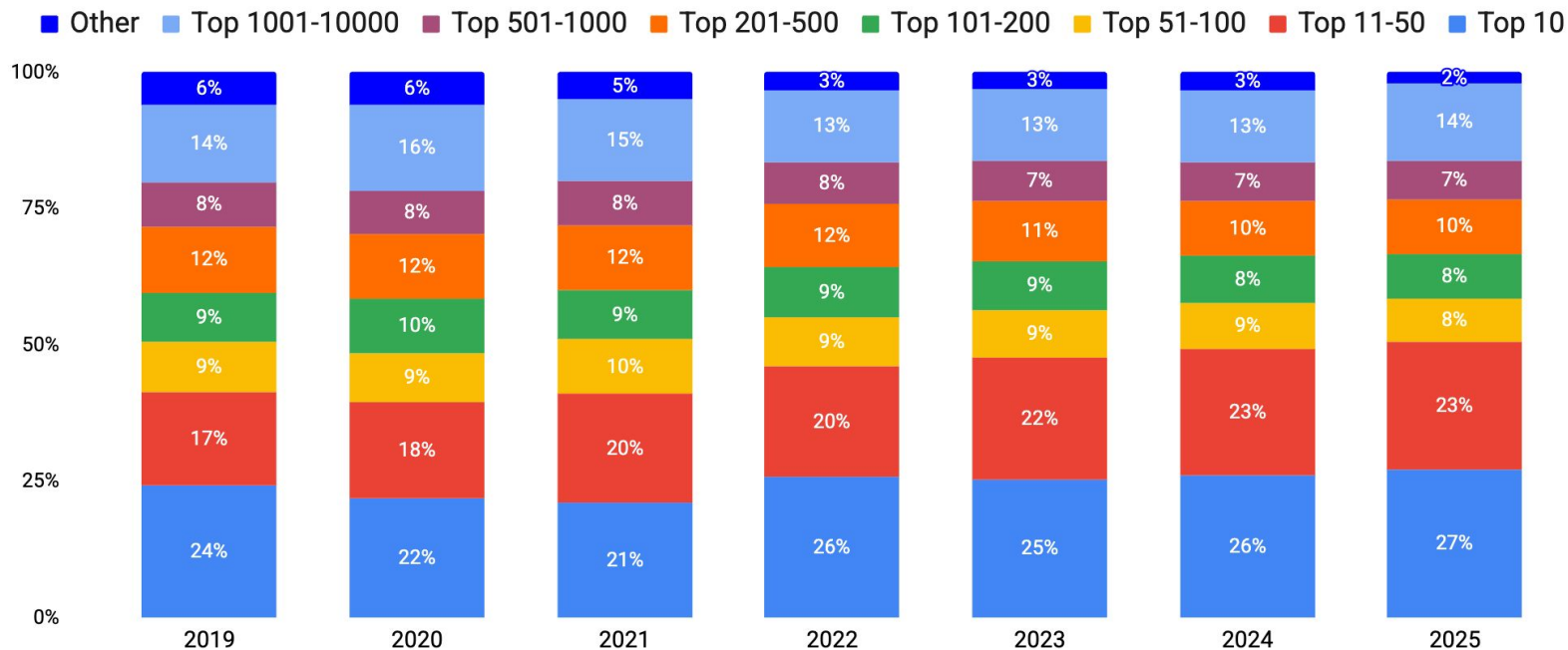
Revenue concentration in mobile non-gaming grew even higher than in mobile gaming

Concentration of mobile non-gaming revenue (Google Play)



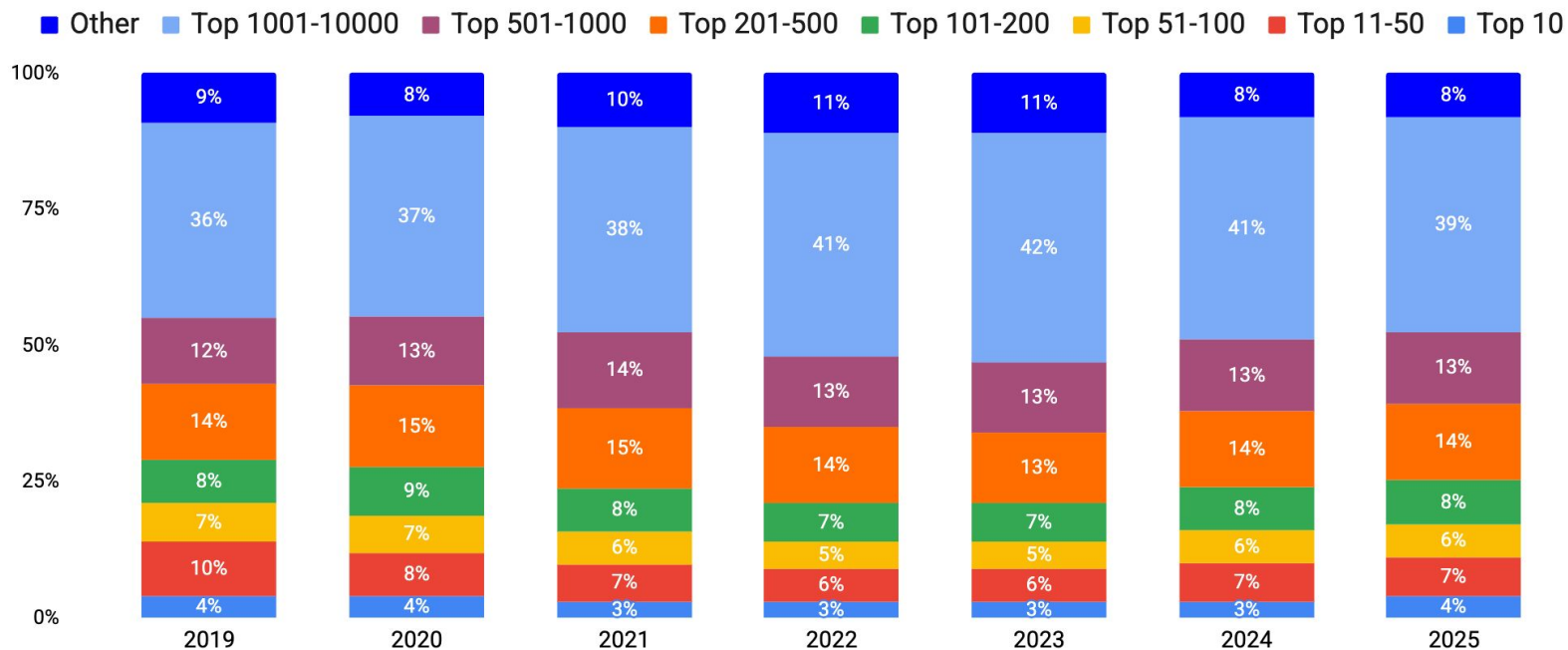
Revenue concentration in mobile non-gaming grew even higher than in mobile gaming

Concentration of mobile non-gaming revenue (iOS)



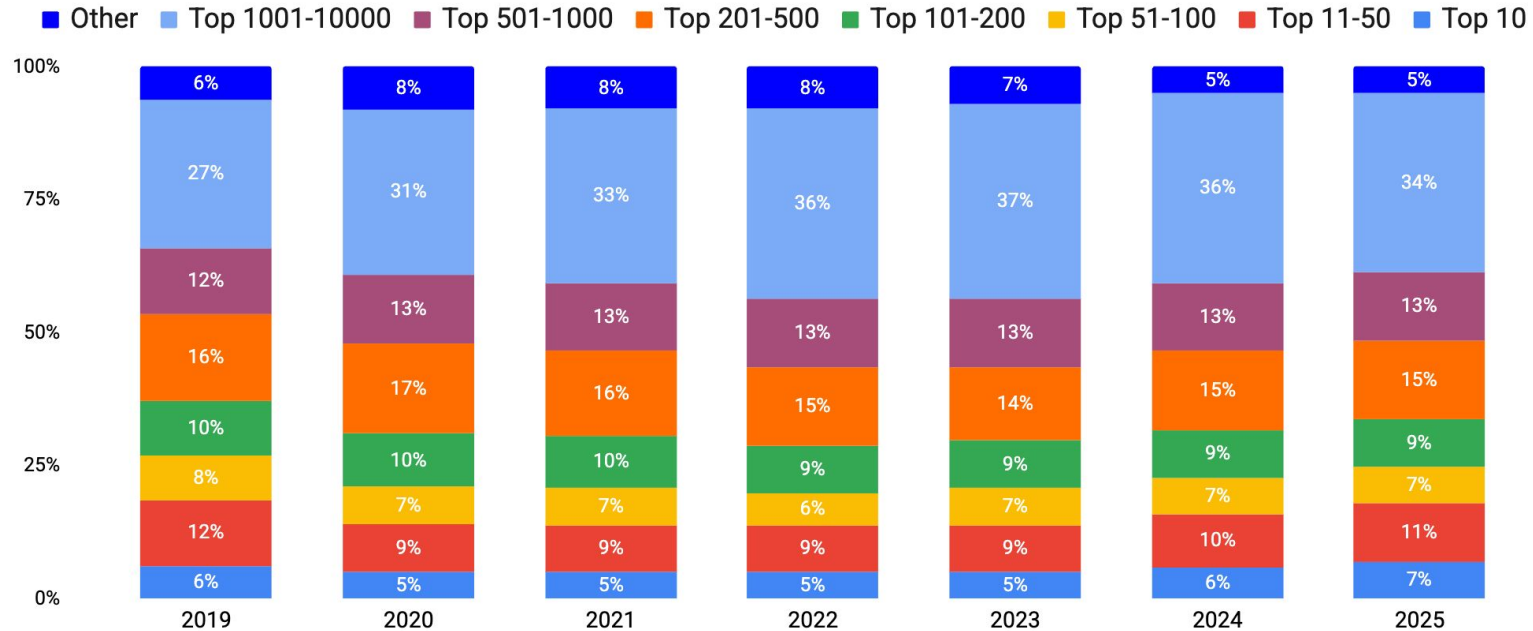
Revenue concentration in mobile gaming grew significantly over the last years

Concentration of mobile gaming downloads (Google Play)



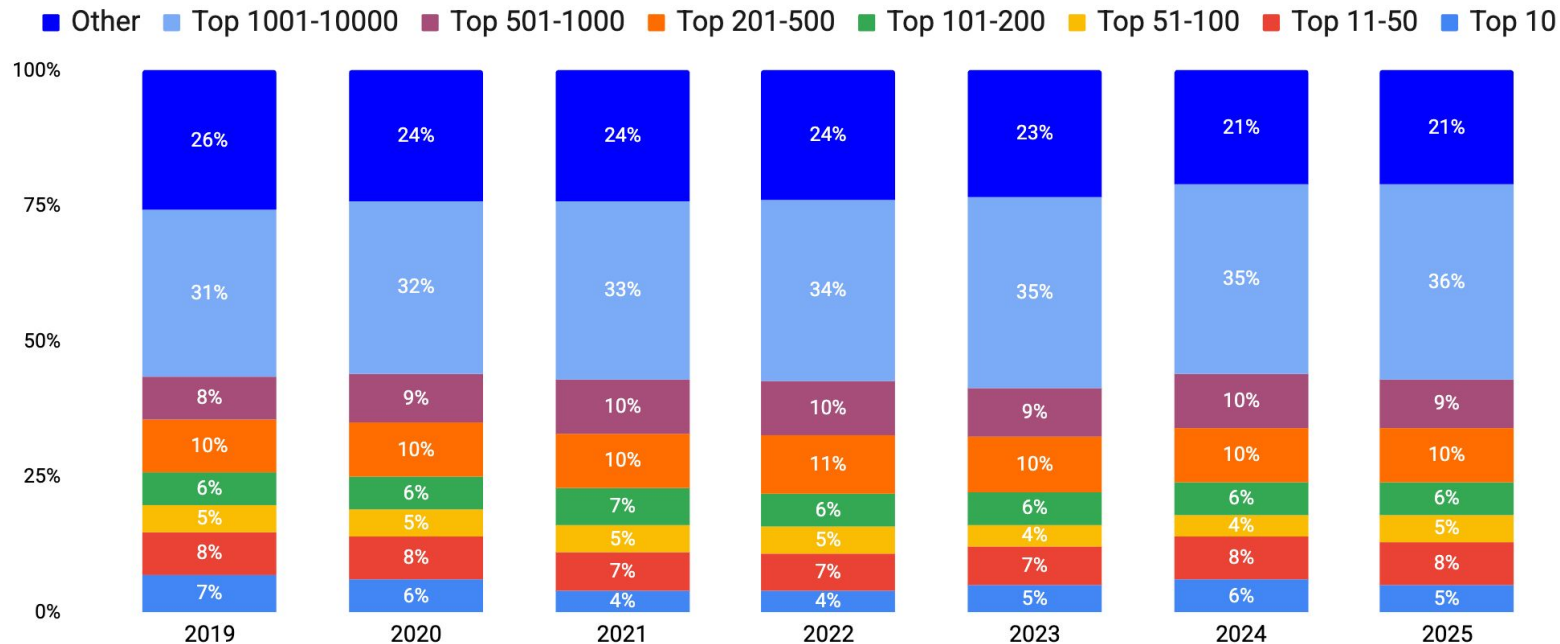
Revenue concentration in mobile gaming grew significantly over the last years

Concentration of mobile gaming downloads (iOS)



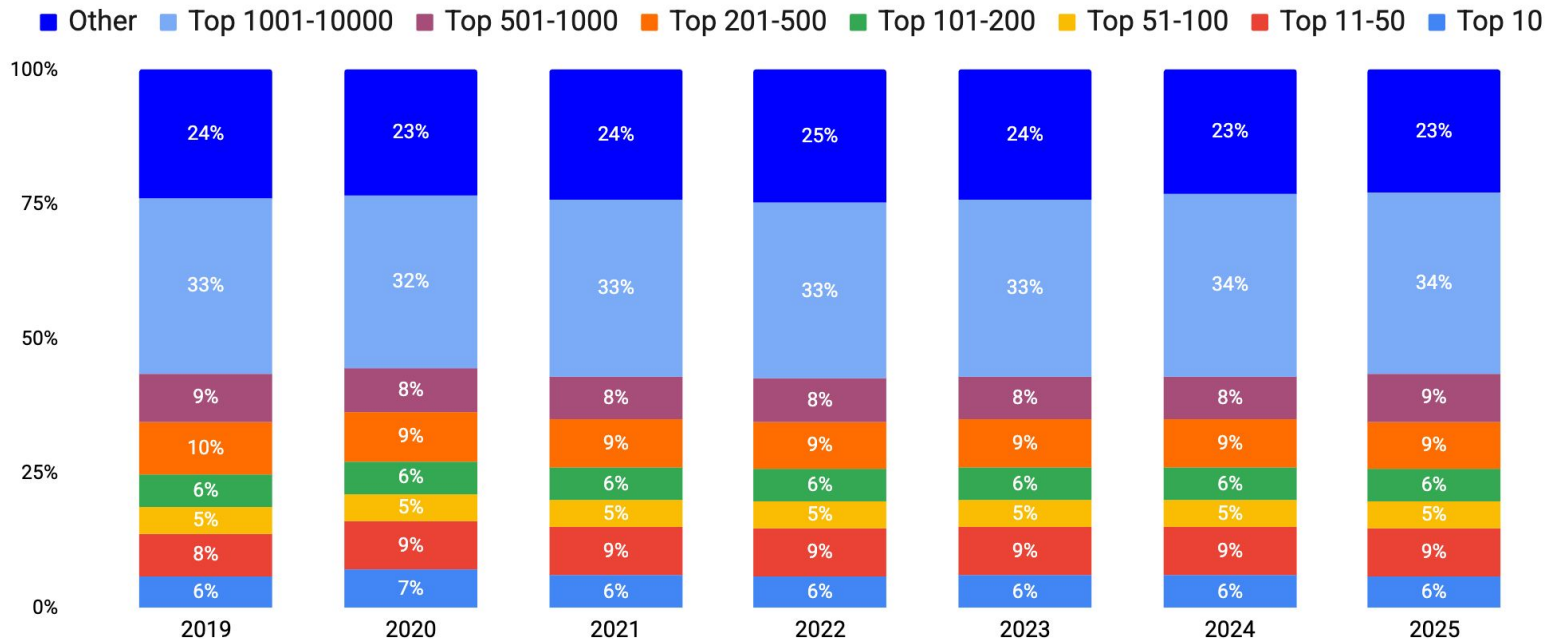
Revenue concentration in mobile non-gaming grew even higher than in mobile gaming

Concentration of mobile non-gaming downloads (Google Play)



Revenue concentration in mobile non-gaming grew even higher than in mobile gaming

Concentration of mobile non-gaming downloads (iOS)



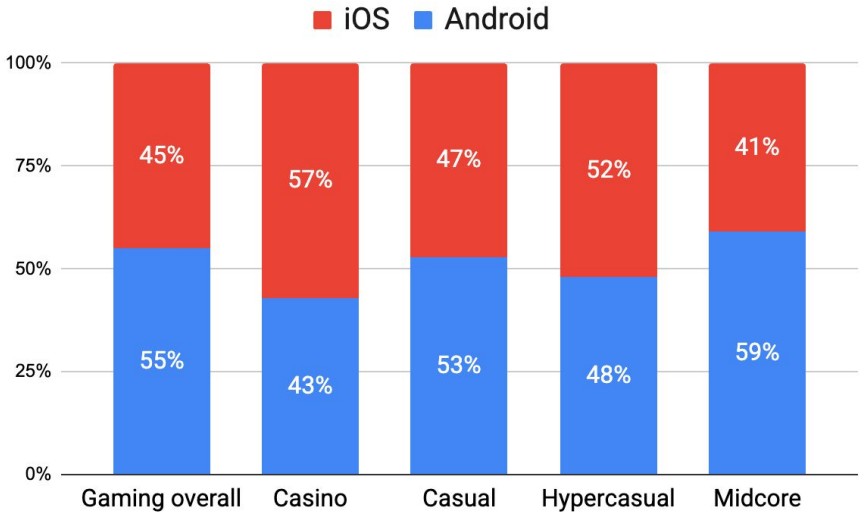
Growth in mobile games



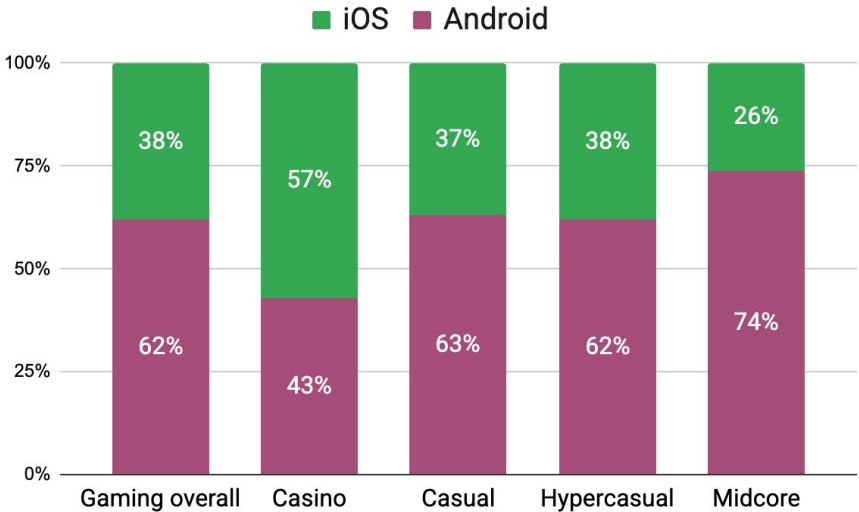
Share of iOS in User Acquisition spend is very high in many countries

UA spend share 2025

Global



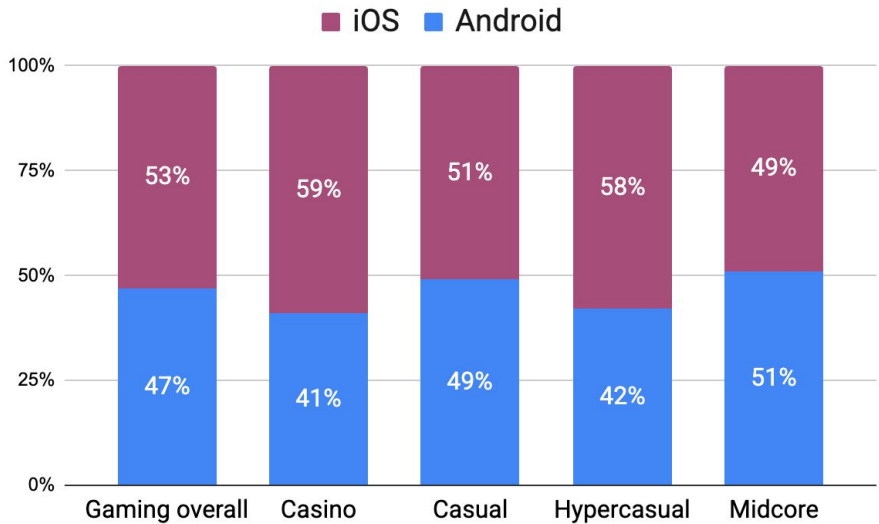
Europe



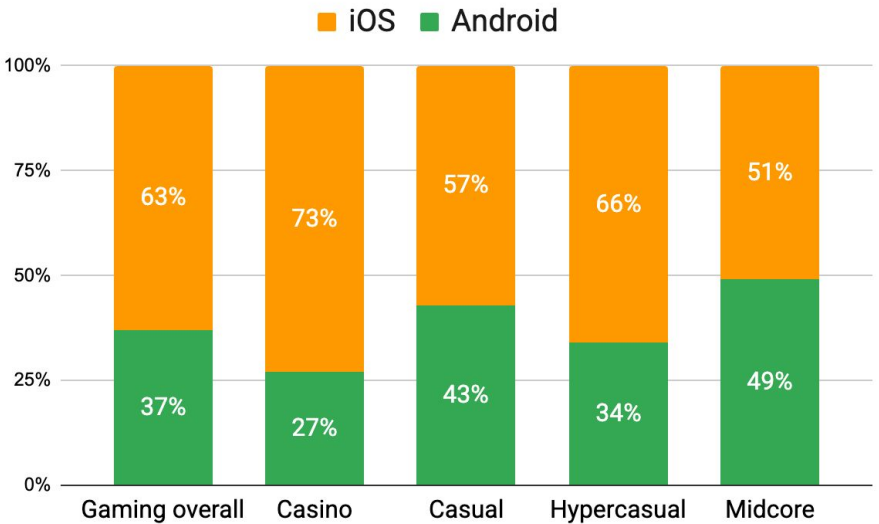
...especially in US and UK

UA spend share 2025

US



UK



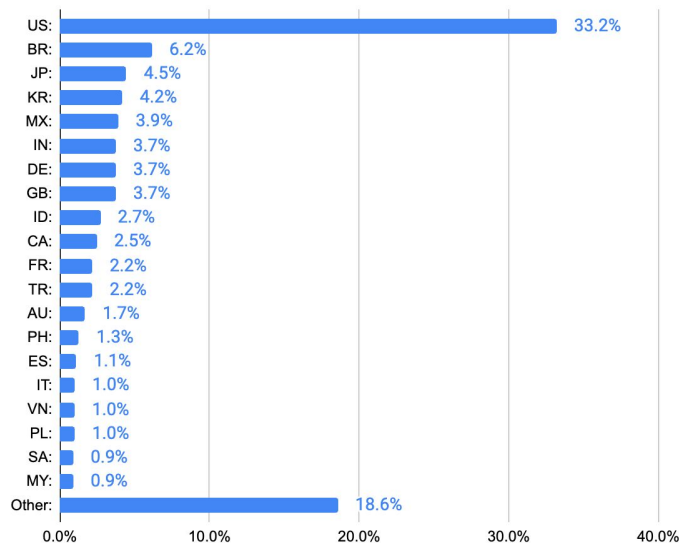
Growth markets in mobile games - Android



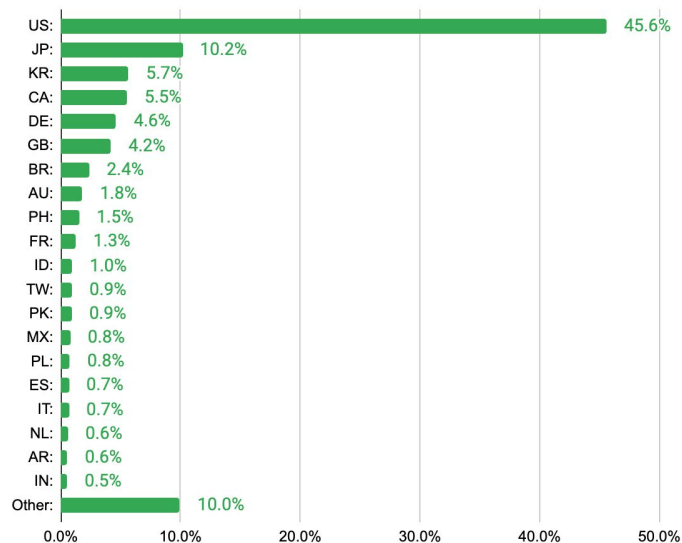
US is still the most important market in gaming

Aggregated Google marketing spend by country for specific app category

Hypercasual - Android



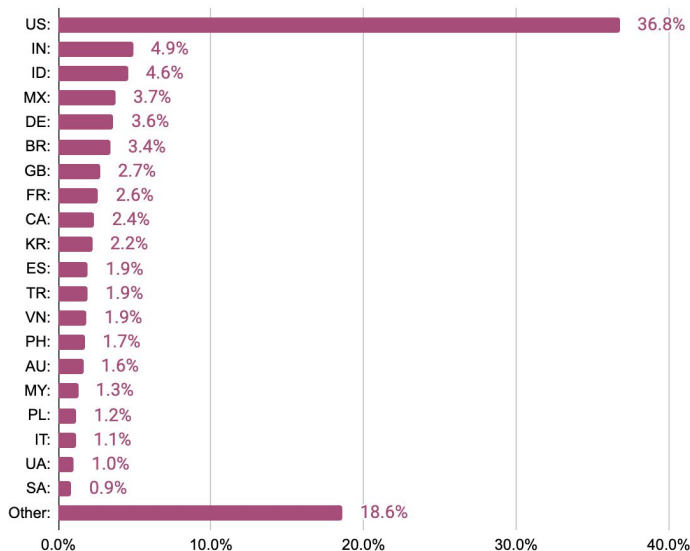
Match3 - Android



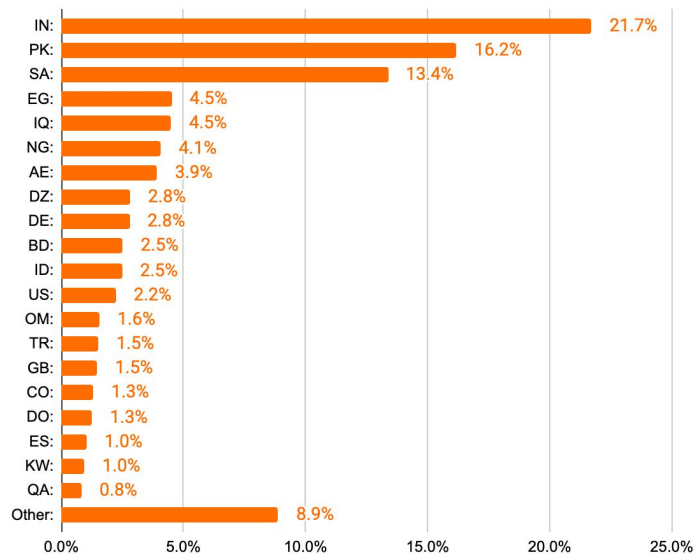
...with many differences between top markets across game subgenres

Aggregated Google marketing spend by country for specific app category

Chess - Android



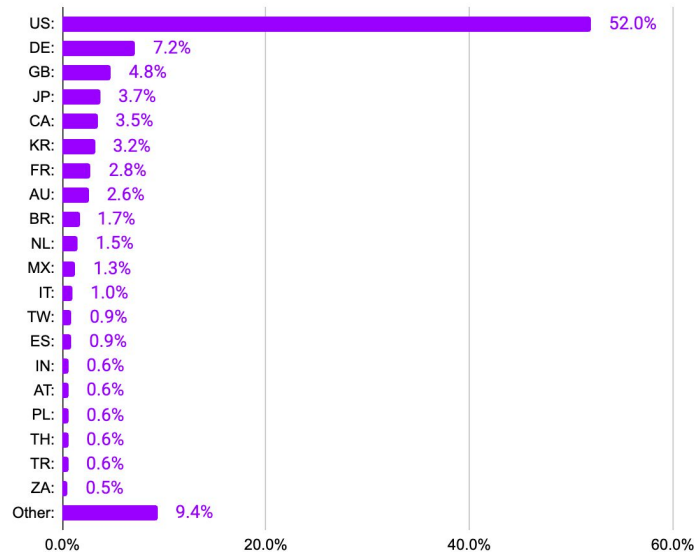
Ludo - Android



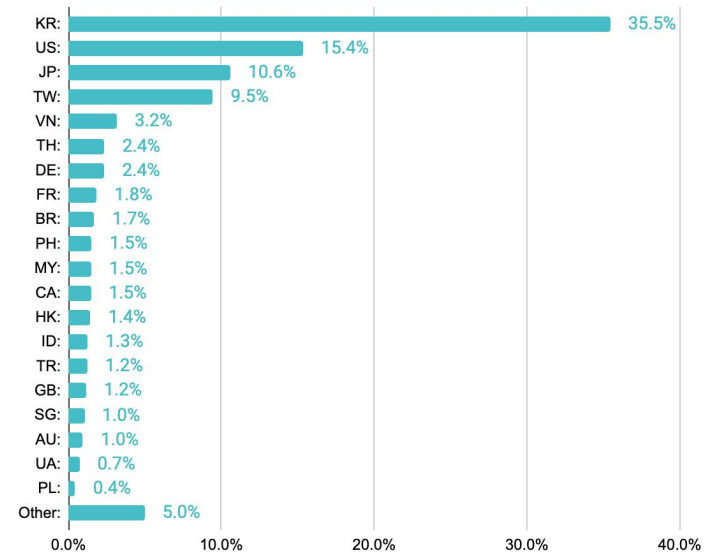
...with many differences between top markets across game subgenres

Aggregated Google marketing spend by country for specific app category

Hidden Object - Android



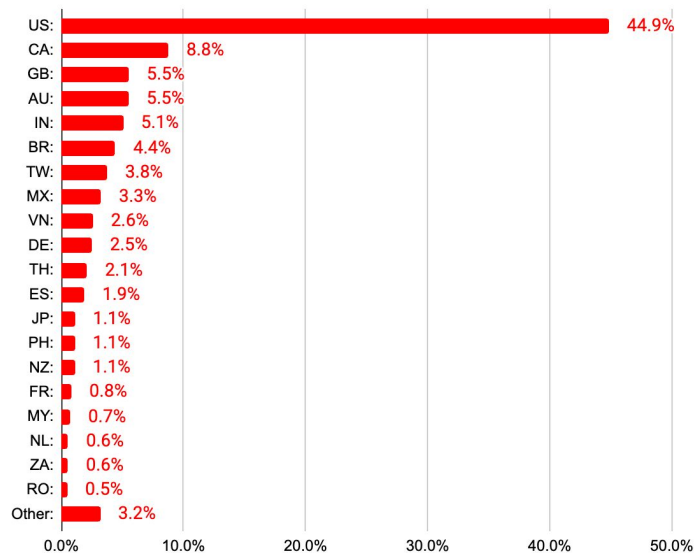
RPG - Android



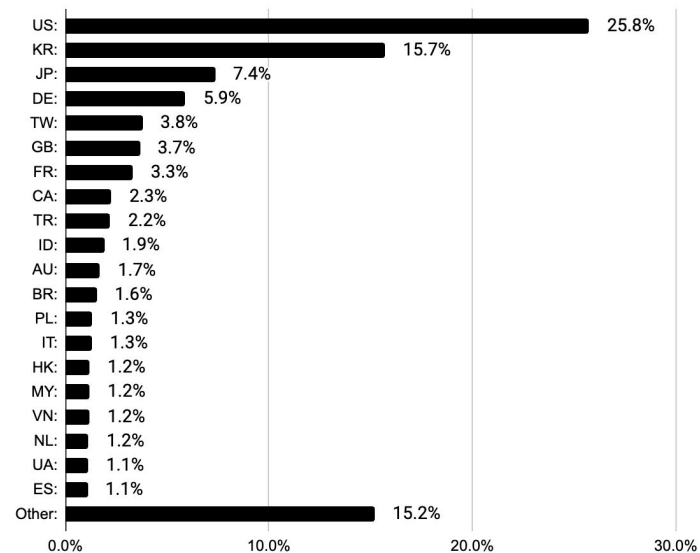
...with many differences between top markets across game subgenres

Aggregated Google marketing spend by country for specific app category

Slots - Android



4X Strategy - Android



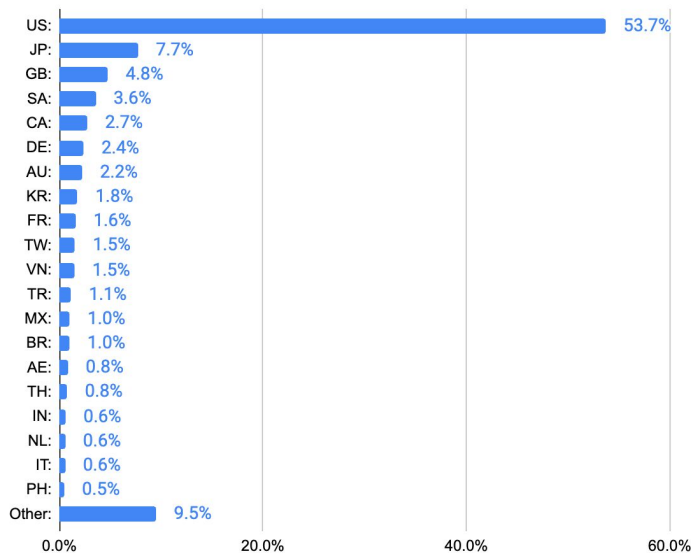
Growth markets in mobile games - iOS



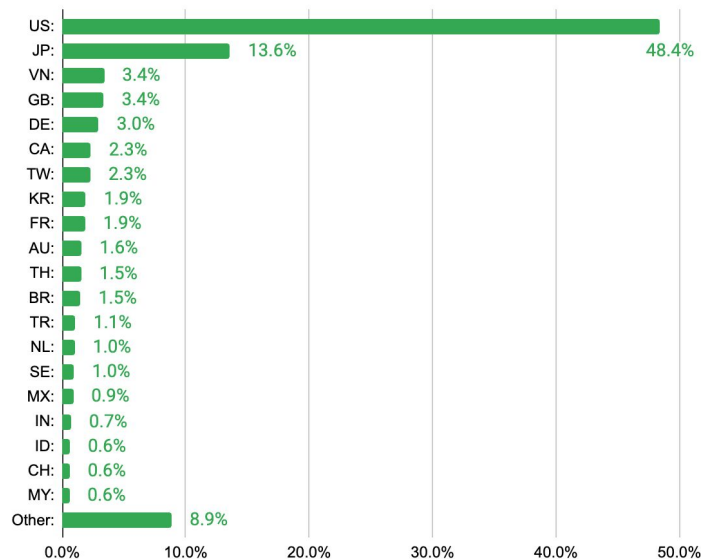
U.S. market dominance is more pronounced in iOS Gaming

Aggregated Google marketing spend by country for specific app category

Hypercasual - iOS



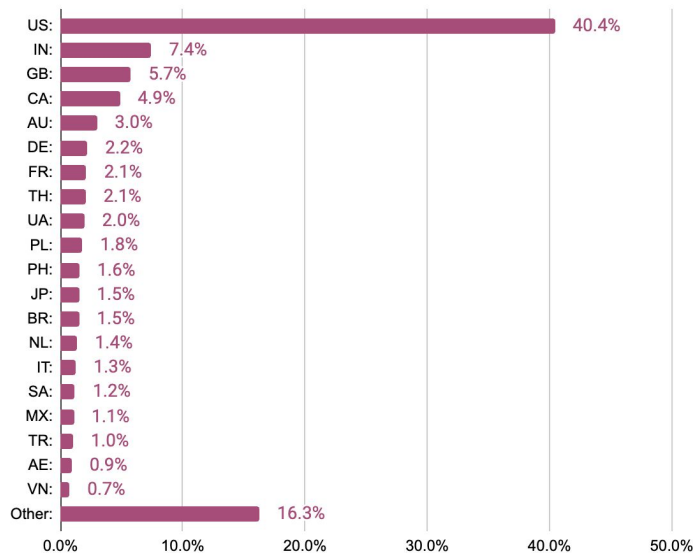
Match3 - iOS



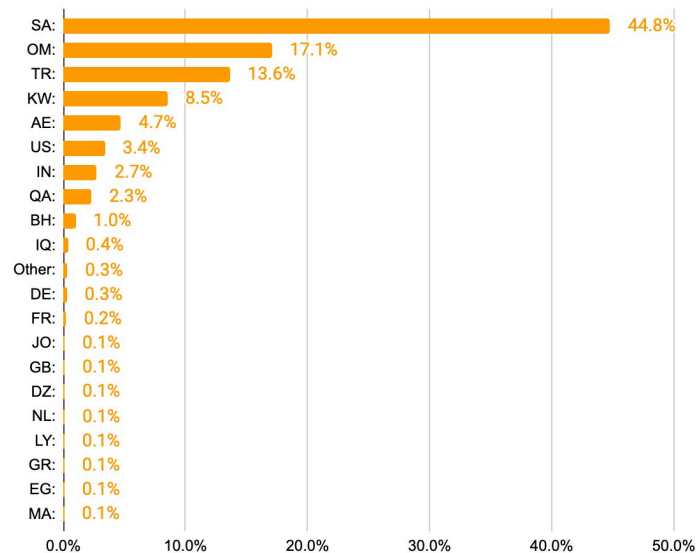
...although other markets play important roles for many subgenres

Aggregated Google marketing spend by country for specific app category

Chess - iOS



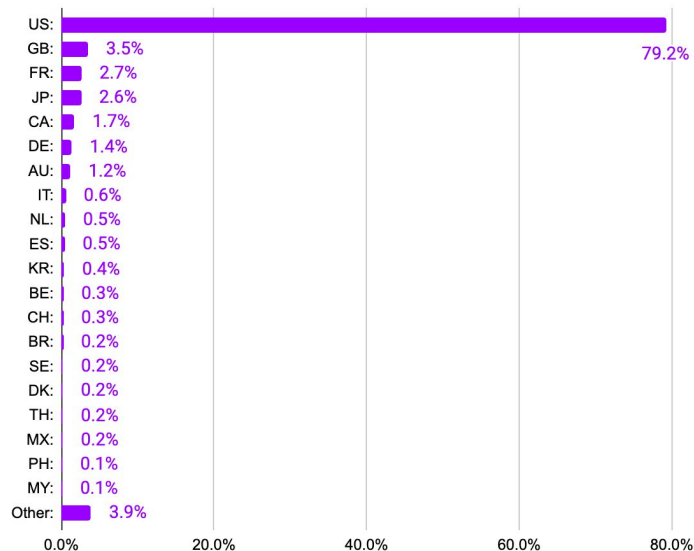
Ludo - iOS



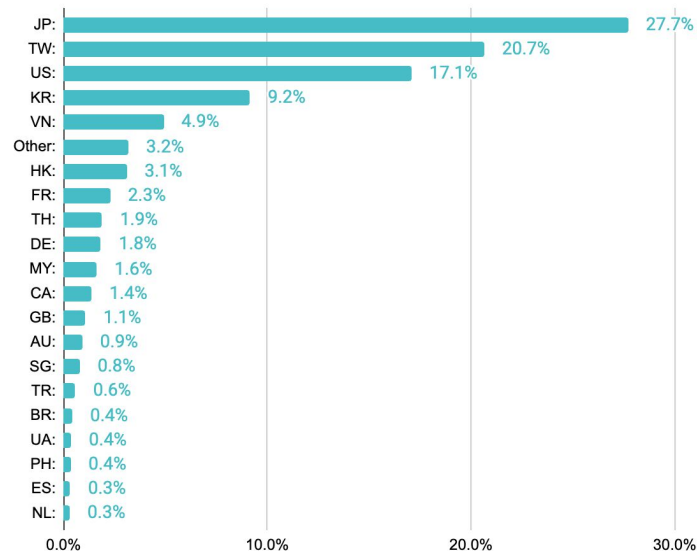
...although other markets play important roles for many subgenres

Aggregated Google marketing spend by country for specific app category

Hidden Object



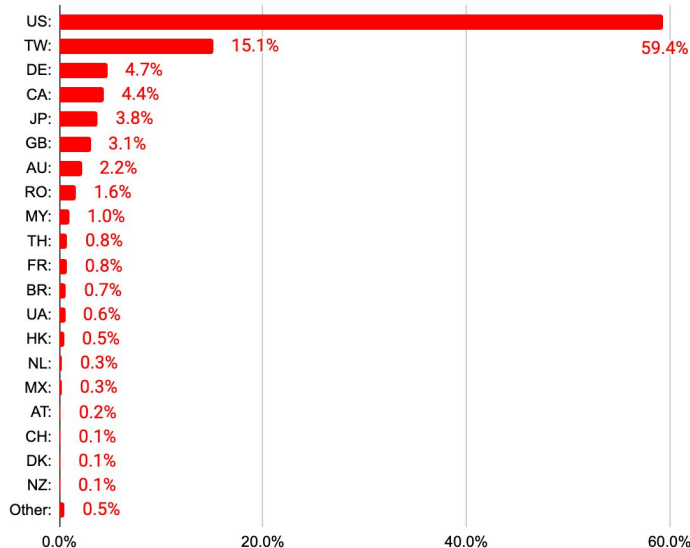
RPG



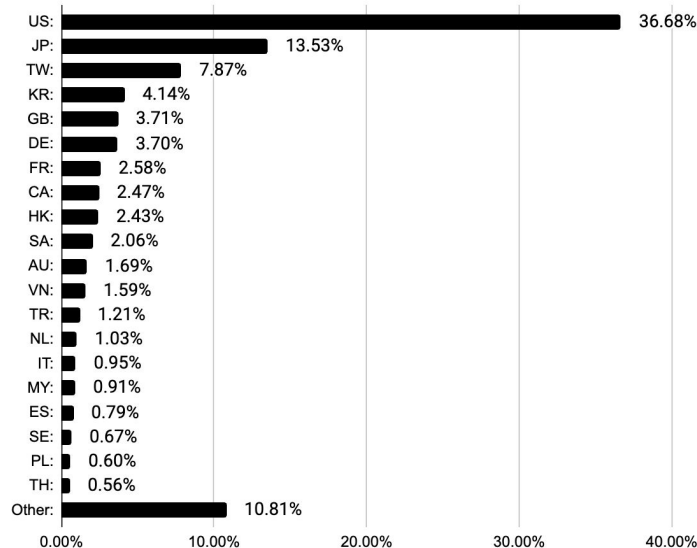
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Aggregated Google marketing spend by country for specific app category

Slots



4X Strategy

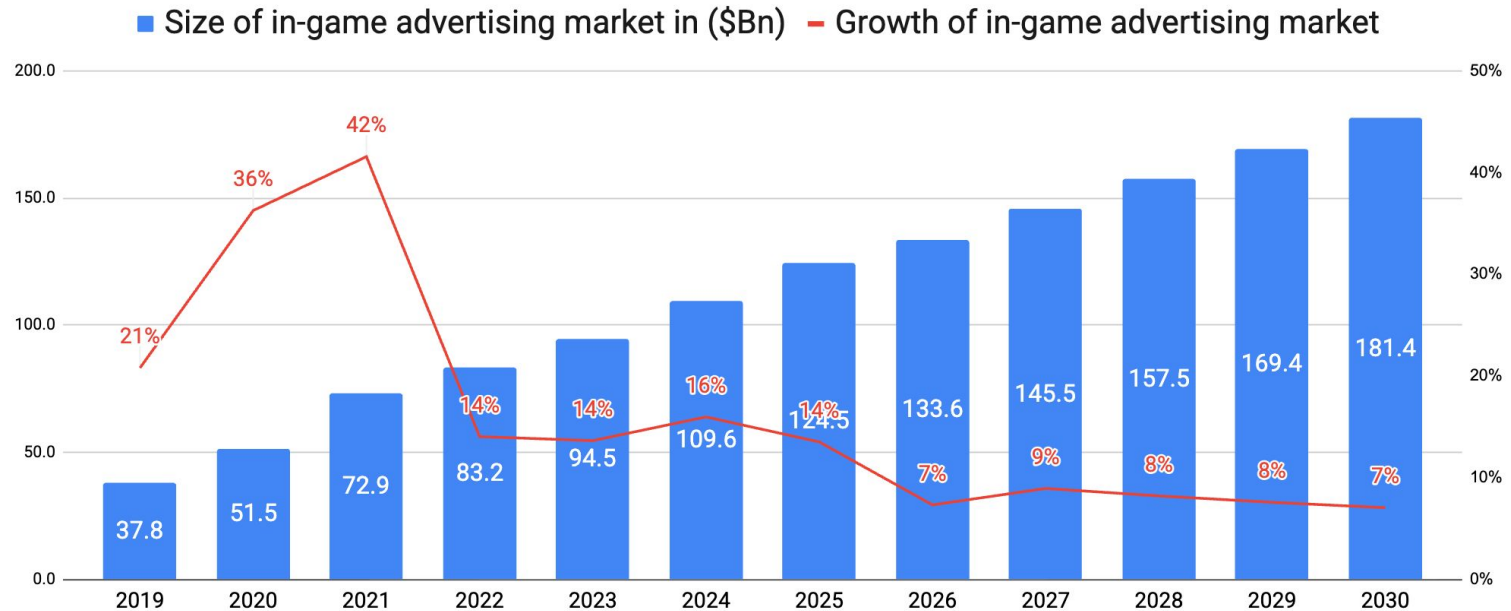


In-game advertising will play a significant role (if done correctly)

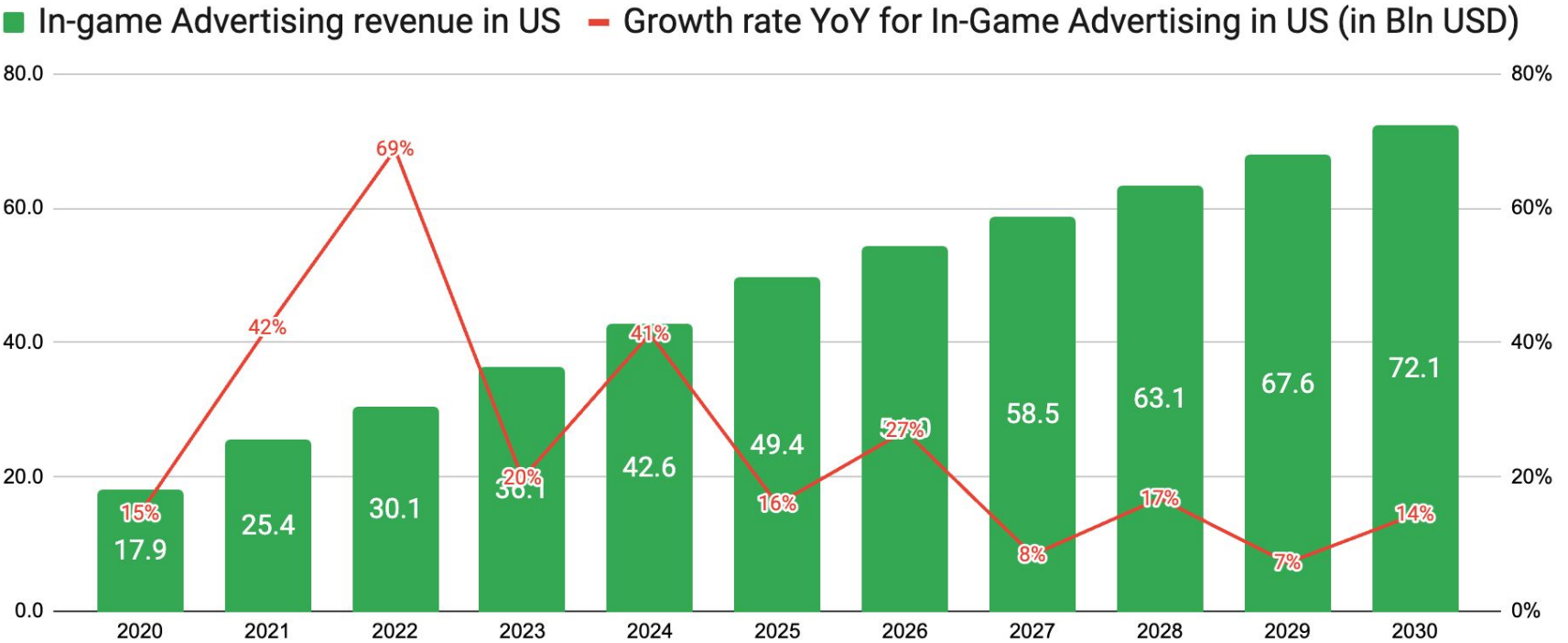


In-game advertising is frequently undervalued within market reports.

Estimates for in-game advertising market

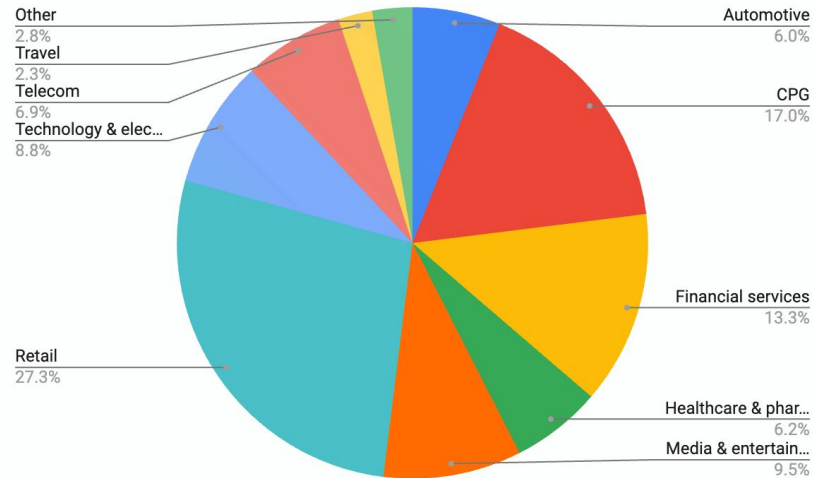


In-game advertising is huge business in US

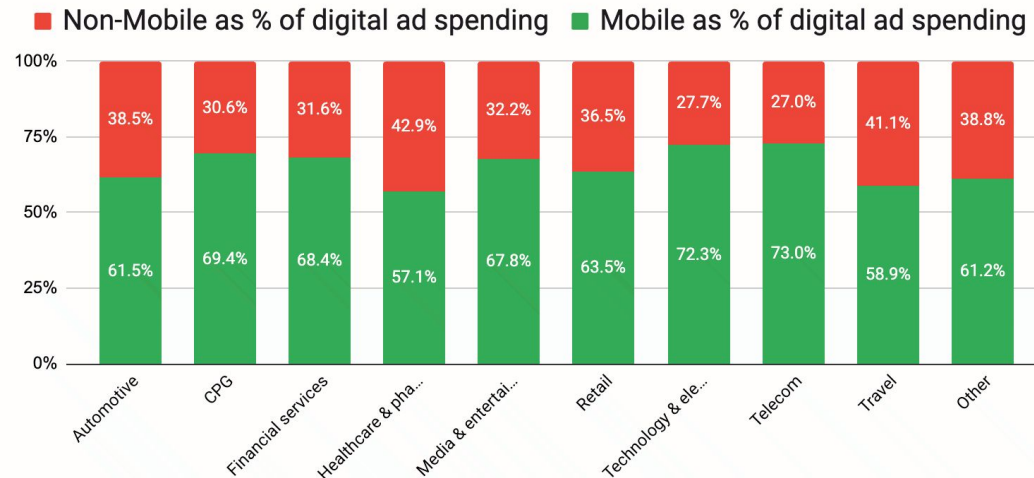


In-game advertising will be driven by growth of mobile ad spending

Mobile ad spending, by industry as share of total mobile ad spending in US in 2025

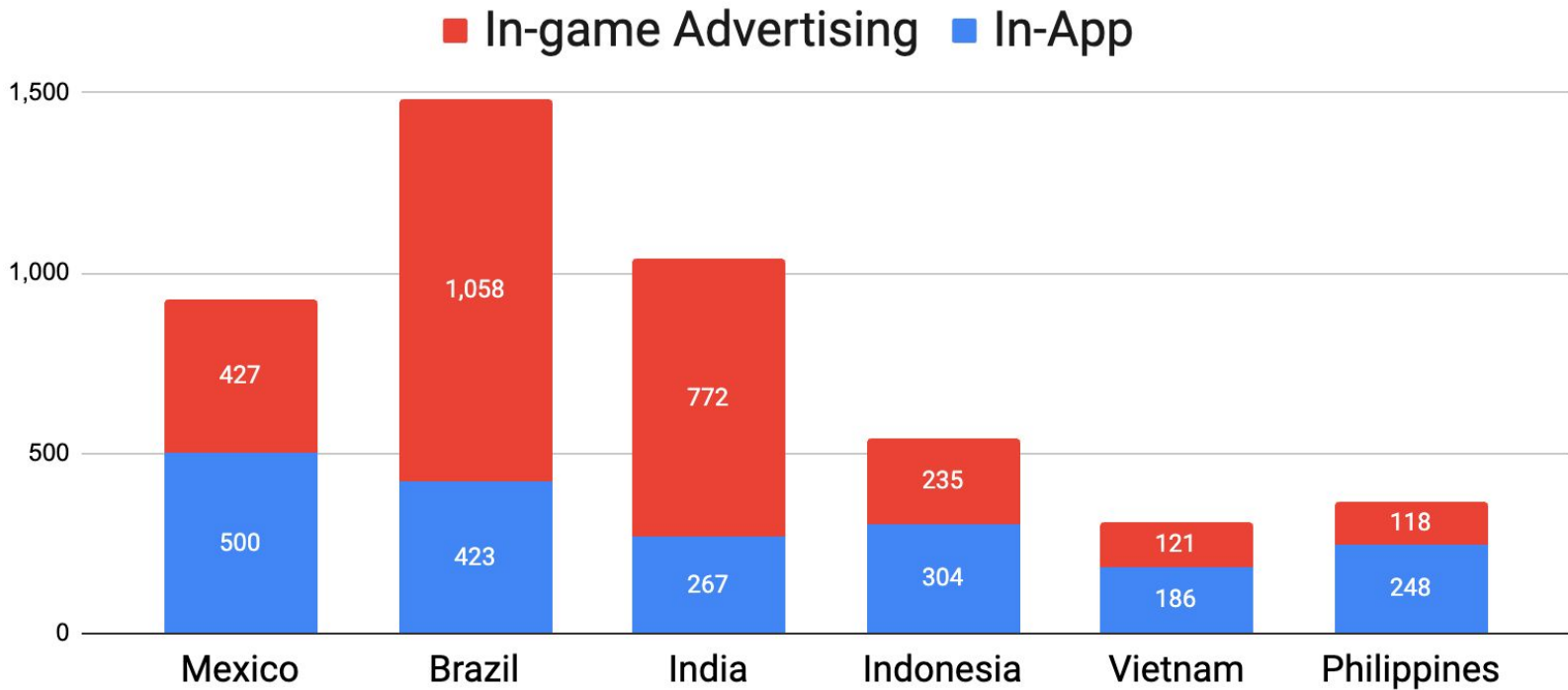


Mobile and nonmobile share of digital ad spending by industry in US in 2025



In-game advertising matters in many countries

Estimated revenue for 2025 in mln USD



Retention remains one of the key metrics in mobile gaming marketability.



Retention rates for top games in Gaming categories

(Gaming, US)

Apple App Store

	Action	Adventure	Board	Card	Casino	Casual	Family	Music
Day 1 Retention	34%	32%	31%	31%	29%	34%	32%	34%
Day 7 Retention	12%	12%	13%	13%	11%	13%	12%	13%
Day 30 Retention	4%	5%	5%	5%	4%	4%	5%	4%

Google Play

	Action	Adventure	Board	Card	Casino	Casual	Educational	Music
Day 1 Retention	34%	33%	28%	32%	27%	34%	28%	32%
Day 7 Retention	11%	11%	12%	14%	10%	12%	8%	11%
Day 30 Retention	4%	4%	5%	6%	4%	5%	4%	4%

Retention rates for top games in Gaming categories

(Gaming, US)

Apple App Store

	Puzzle	Racing	Role Playing	Simulation	Sports	Strategy	Trivia	Word
Day 1 Retention	32%	34%	32%	35%	37%	34%	30%	29%
Day 7 Retention	13%	11%	12%	13%	14%	13%	11%	12%
Day 30 Retention	5%	3%	4%	5%	5%	5%	4%	5%

Google Play

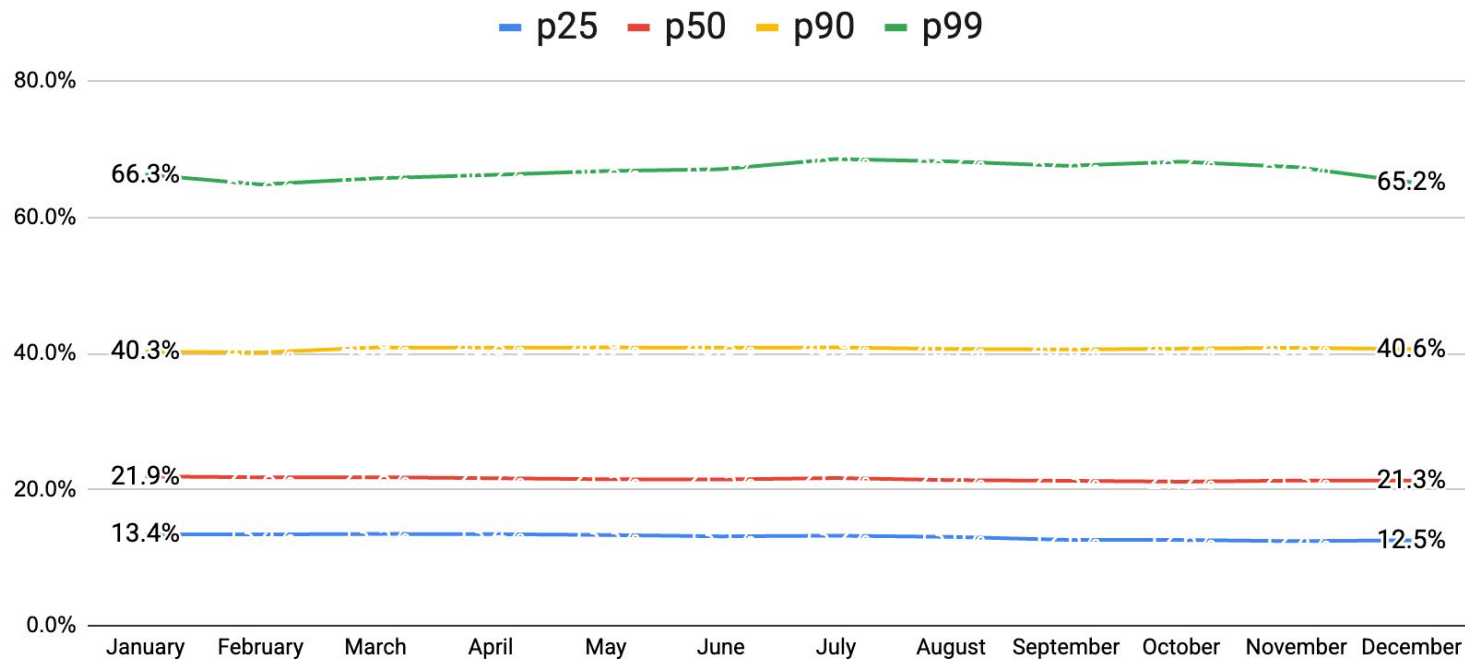
	Puzzle	Racing	Role Playing	Simulation	Sports	Strategy	Trivia	Word
Day 1 Retention	33%	34%	31%	35%	37%	33%	28%	30%
Day 7 Retention	14%	11%	11%	12%	14%	12%	10%	13%
Day 30 Retention	5%	4%	4%	4%	6%	4%	4%	5%

Retention rates are
declining in mobile gaming.



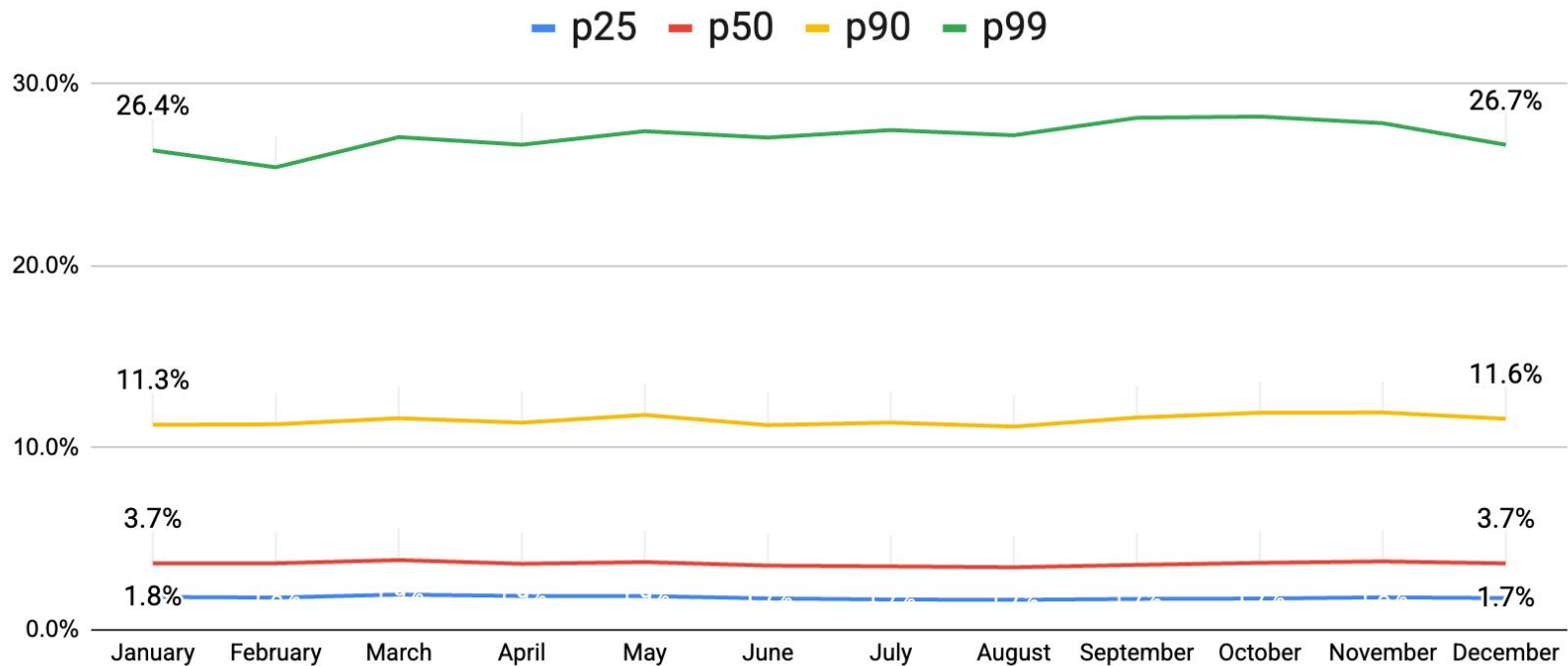
Retention rates are declining in mobile gaming. We can observe this across almost all data percentiles. Especially in D1 retention.

(D1, Gaming, worldwide)



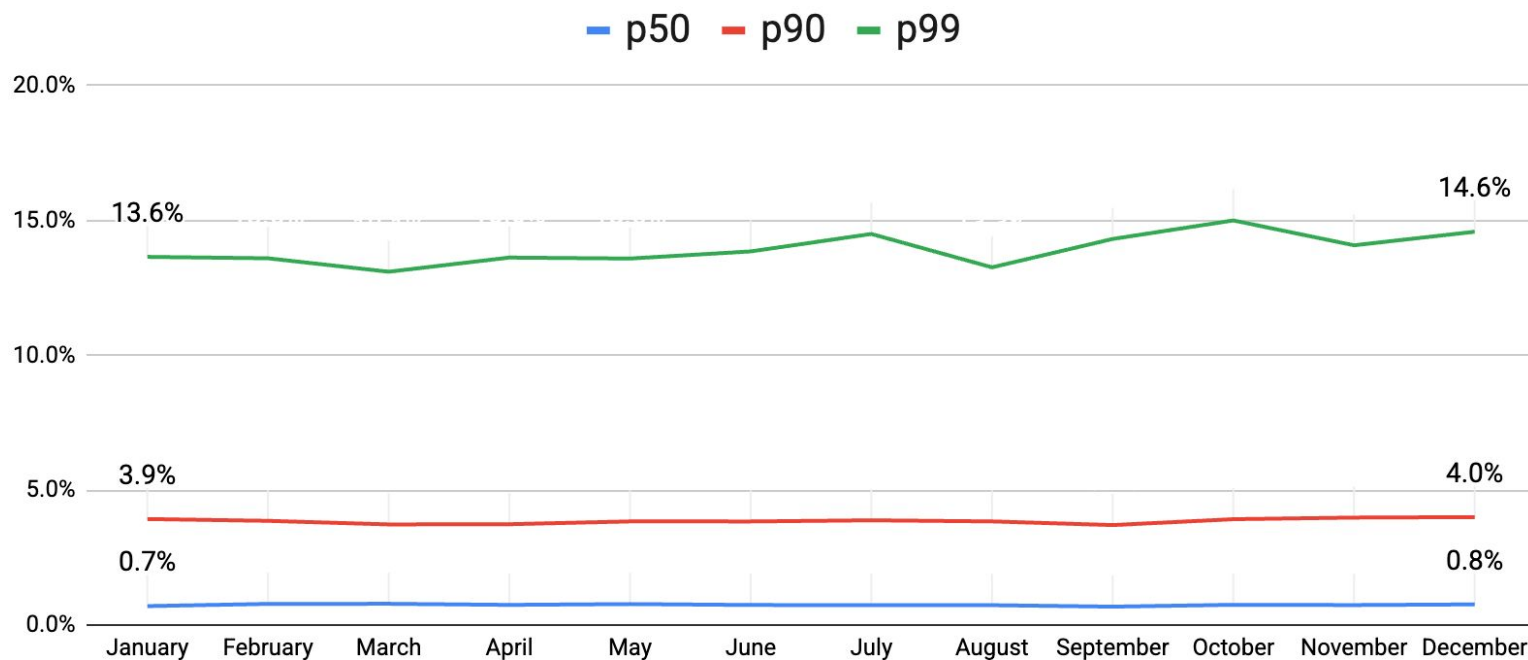
Retention rates are declining in mobile gaming. We can observe this across almost all data percentiles.

(D7, Gaming, worldwide)

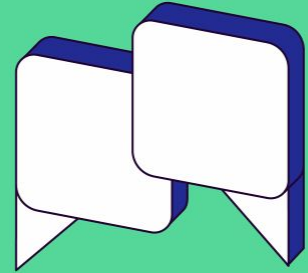


This effect is less visible in D30 retention

(D30, Gaming, worldwide)



Mobile gaming in details

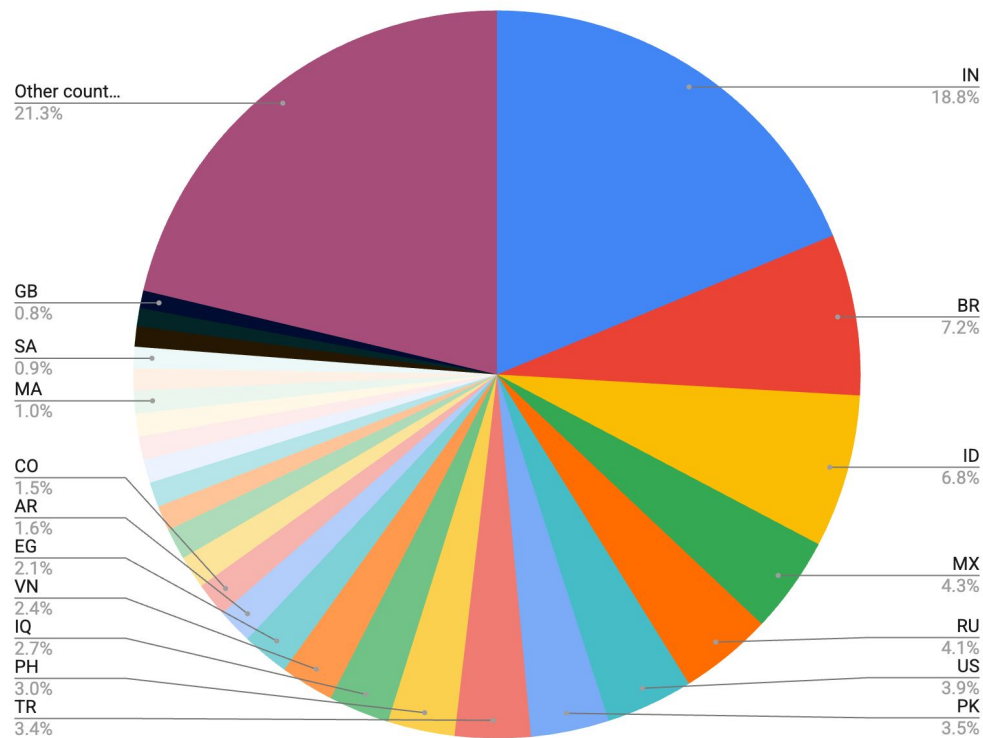


Downloads and revenue shares in Android



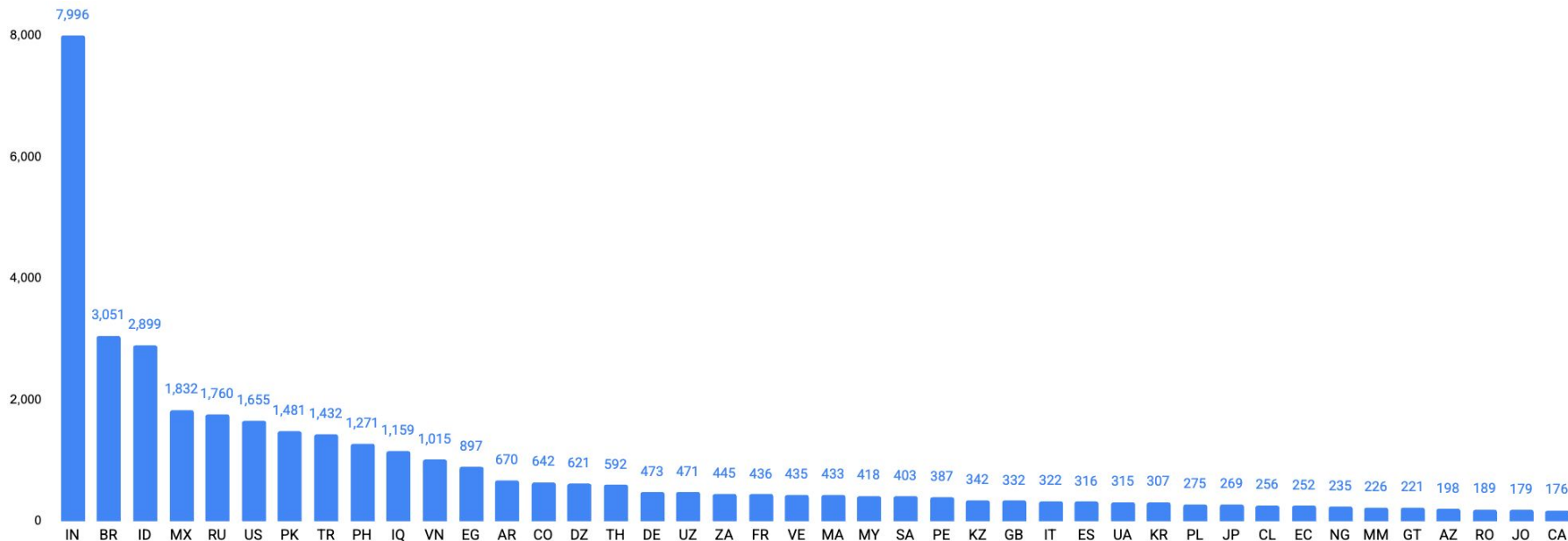
Android downloads are driven by Emerging markets

Share of Android downloads by countries, Q1 to Q4 2025



Android downloads are driven by Emerging markets

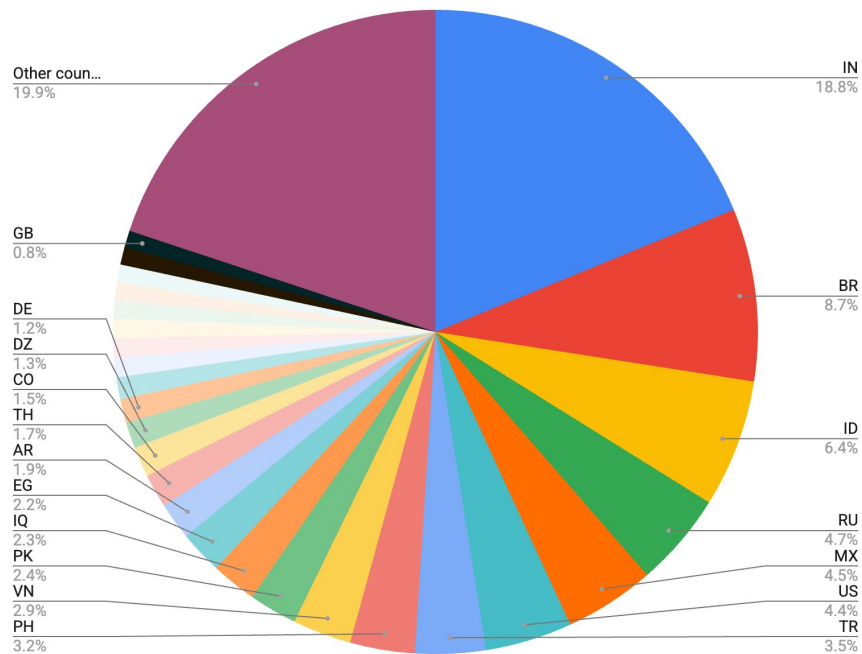
Android downloads by countries in mln downloads, Q1 to Q4 2025



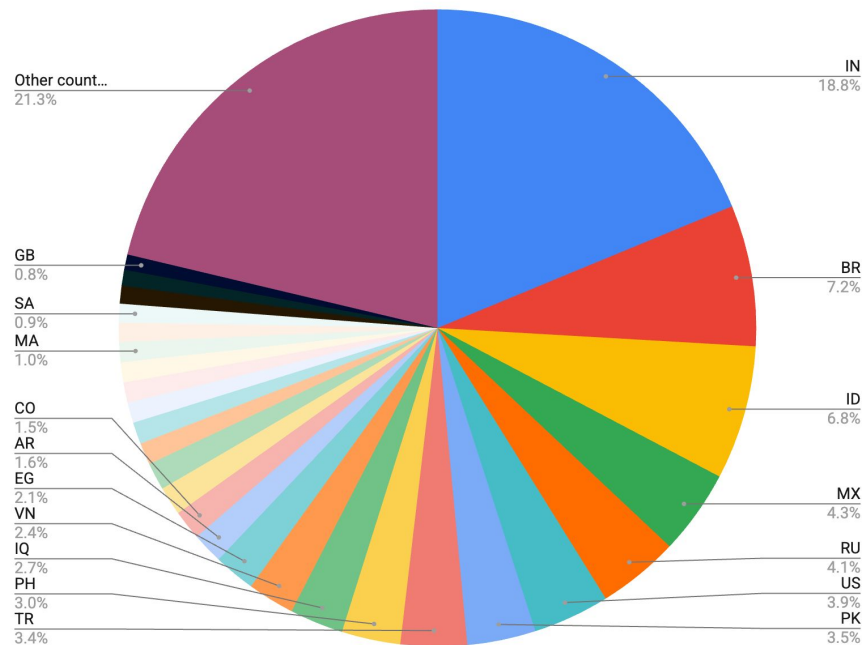
Android downloads are driven by Emerging markets

Share of Android downloads by countries

Android in 2023

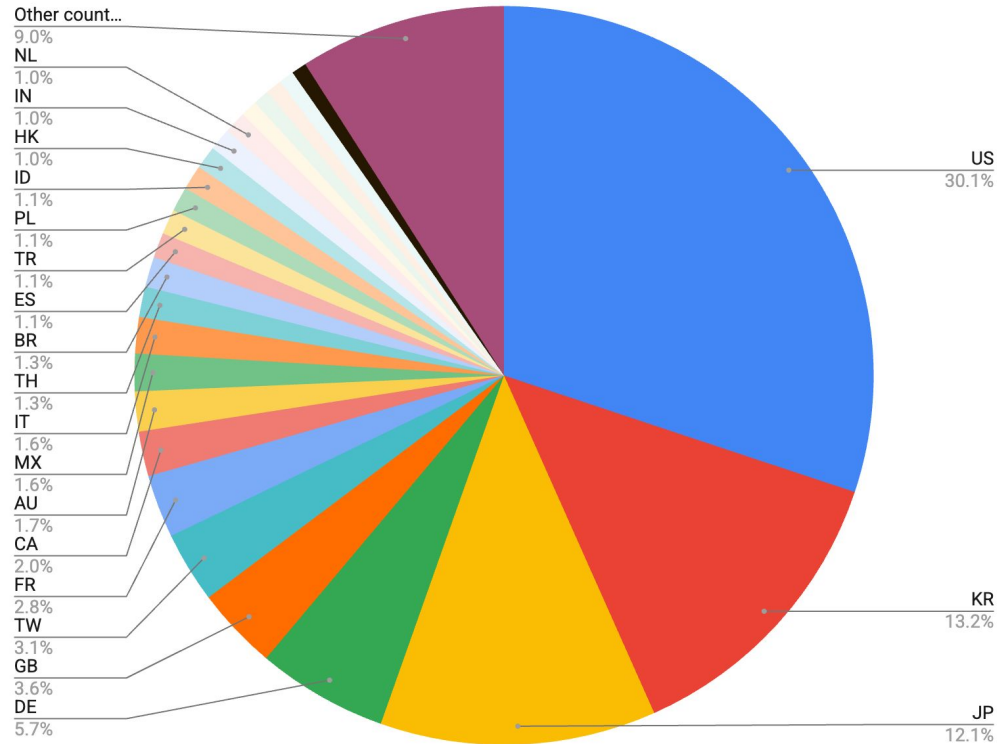


Android in 2025

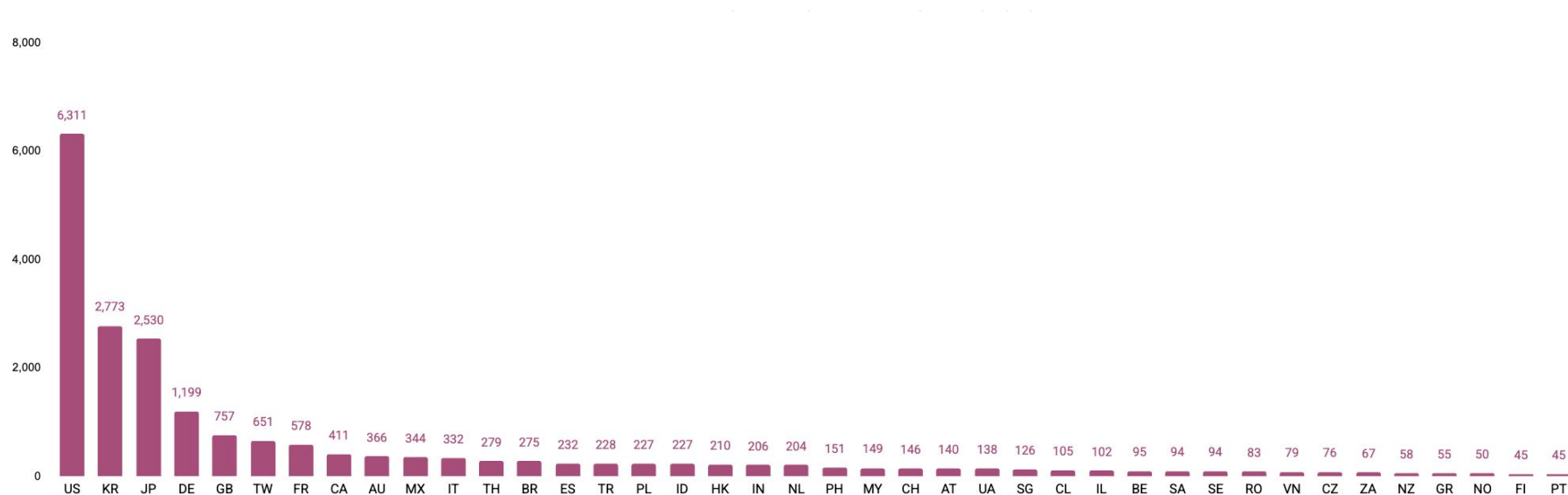


US, JP, KR and top Western markets still drive the revenue

Share of Android revenue by countries, Q1 to Q4 2025



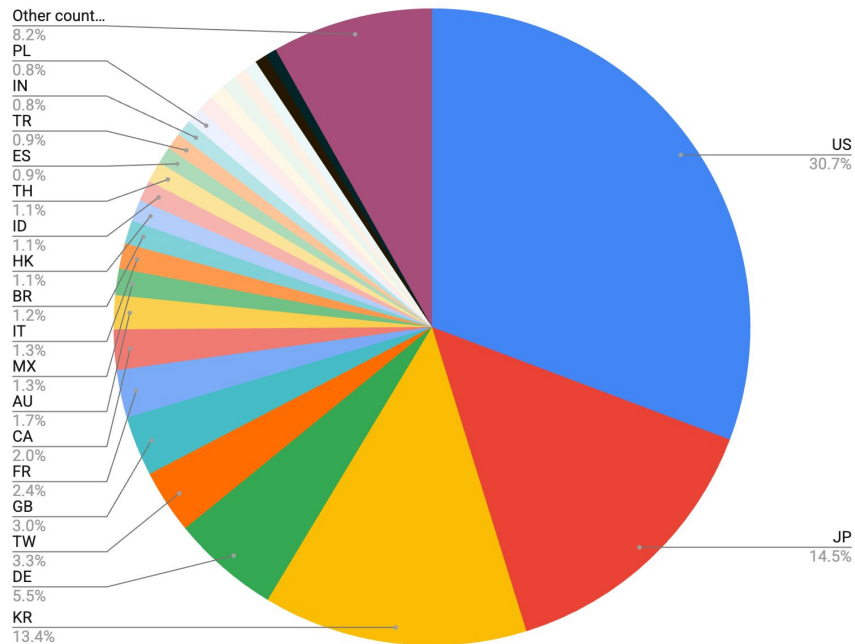
Top countries account for majority of in-app and subscription revenue



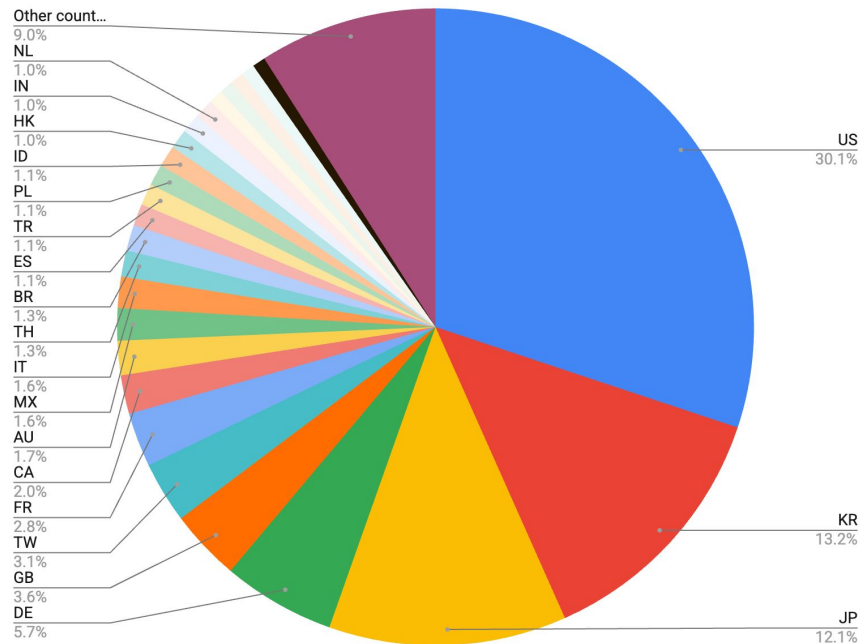
..although there are some shifts between those countries in the last years

Share of Android revenue by countries

Android in 2023



Android in 2025

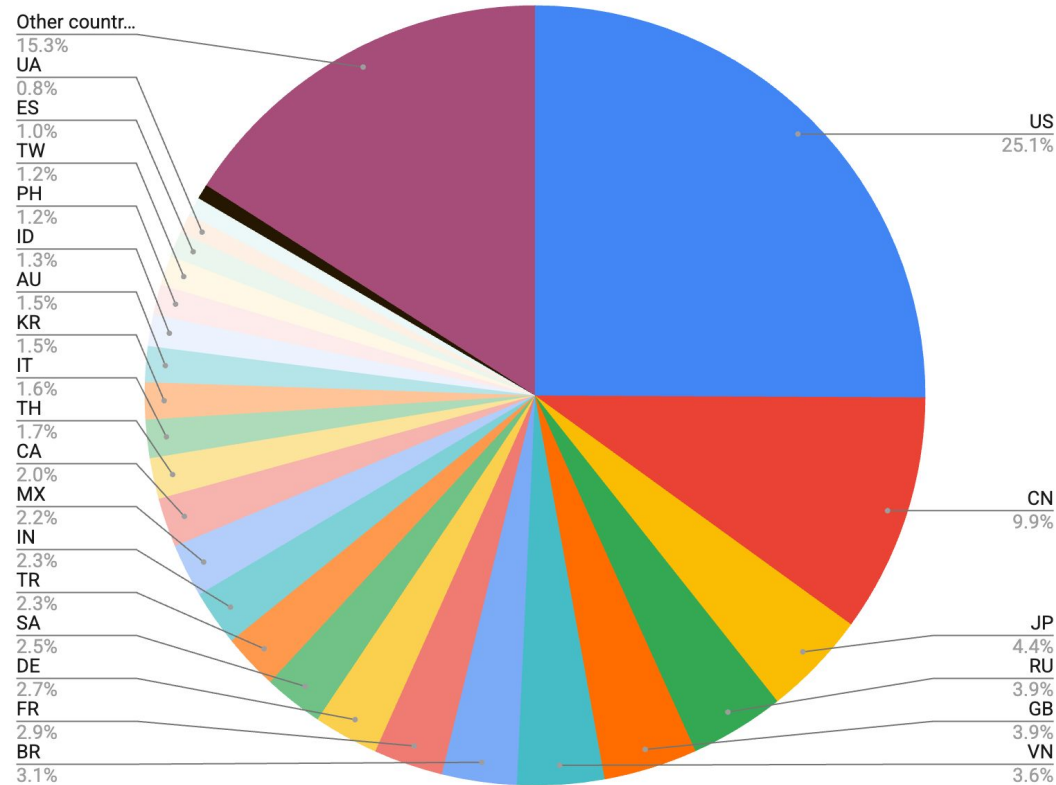


iOS: Downloads and revenue shares



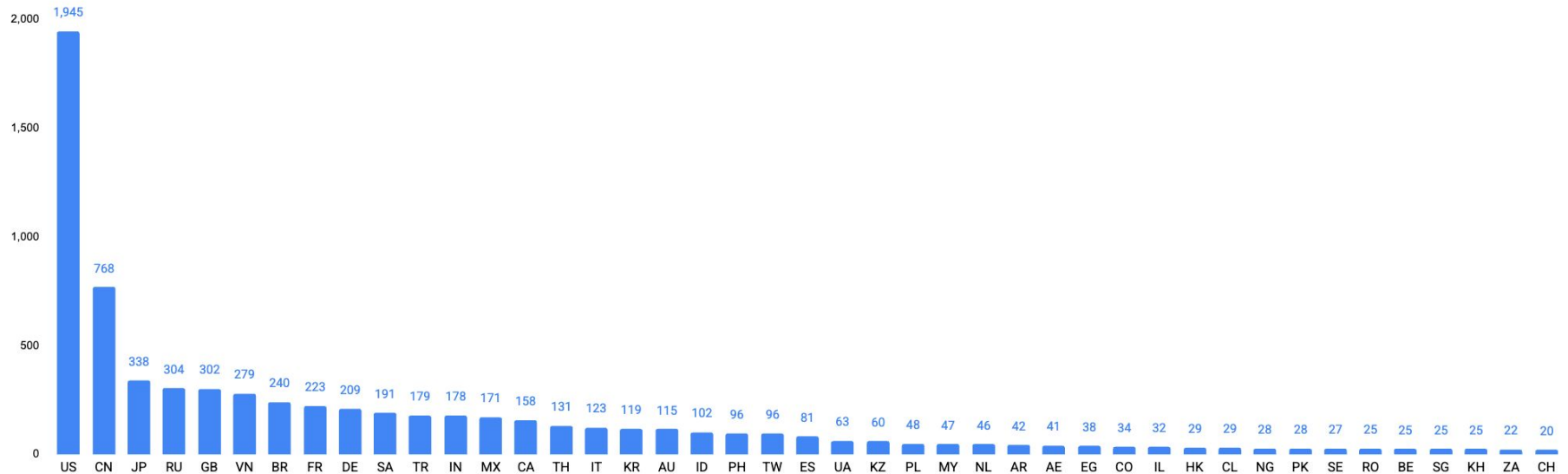
iOS downloads are driven by US and China

Share of iOS downloads by countries, Q1 to Q4 2025



iOS downloads are driven by US and China

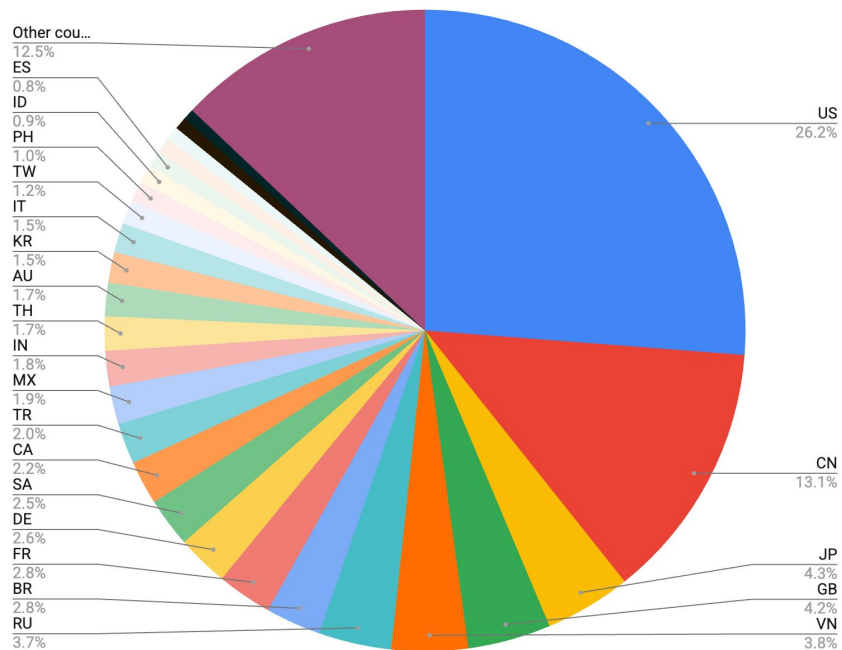
iOS downloads by countries in mln downloads, Q1 to Q4 2025



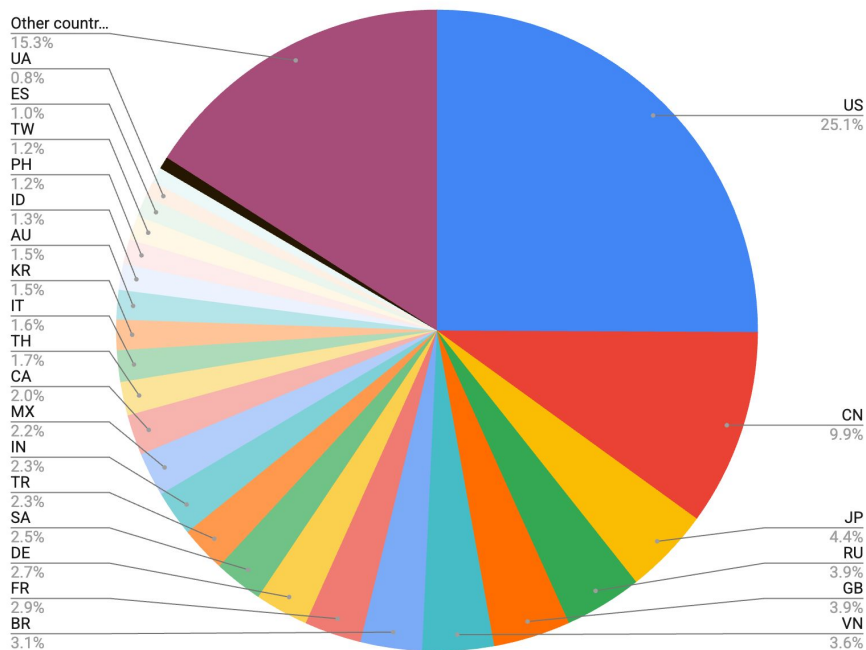
U.S. share of iOS downloads is declining

Share of iOS downloads by countries

iOS in 2023

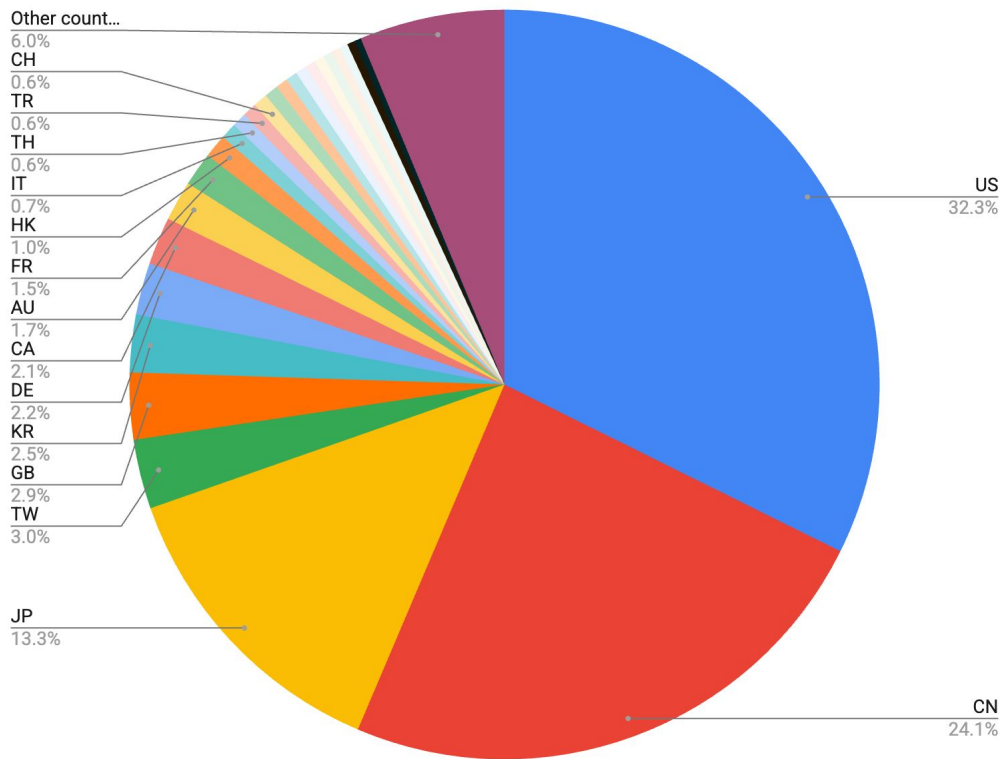


iOS in 2025



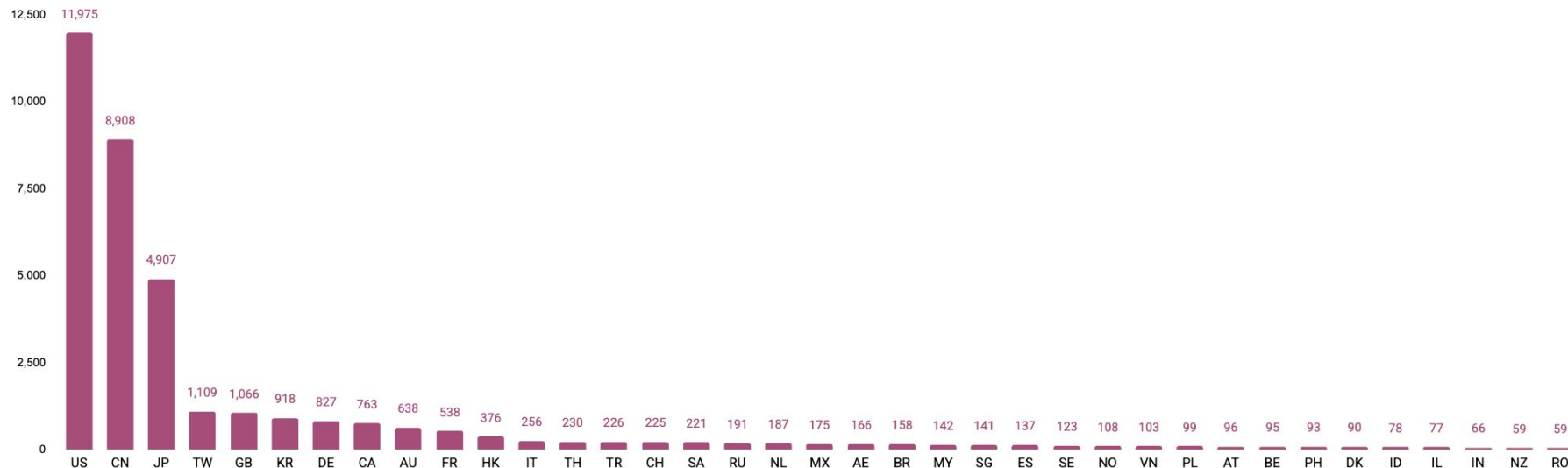
US and China account for the majority of iOS revenue

Share of iOS revenue by countries, Q1 to Q4 2025



iOS revenue is highly concentrated in top markets

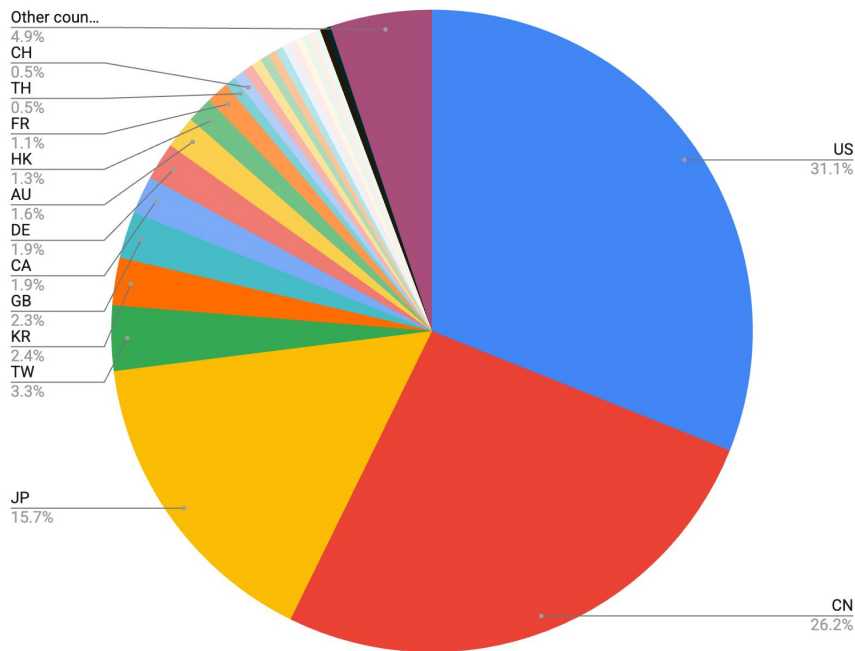
iOS revenue by countries in mln USD, Q1 to Q4 2025



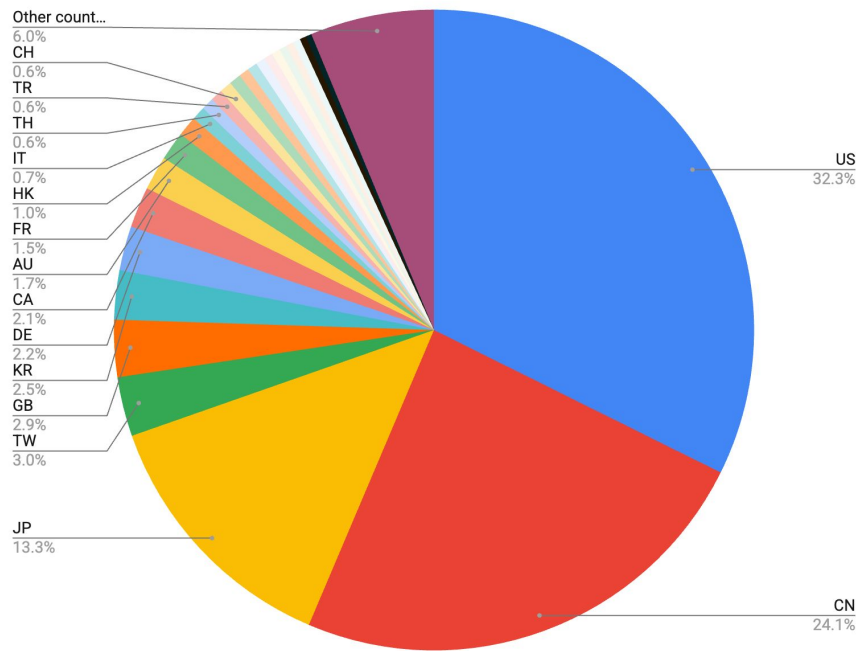
U.S. share of iOS revenue grew over recent quarters

Share of iOS revenue by countries

iOS in 2023



iOS in 2025



Category trends in mobile gaming



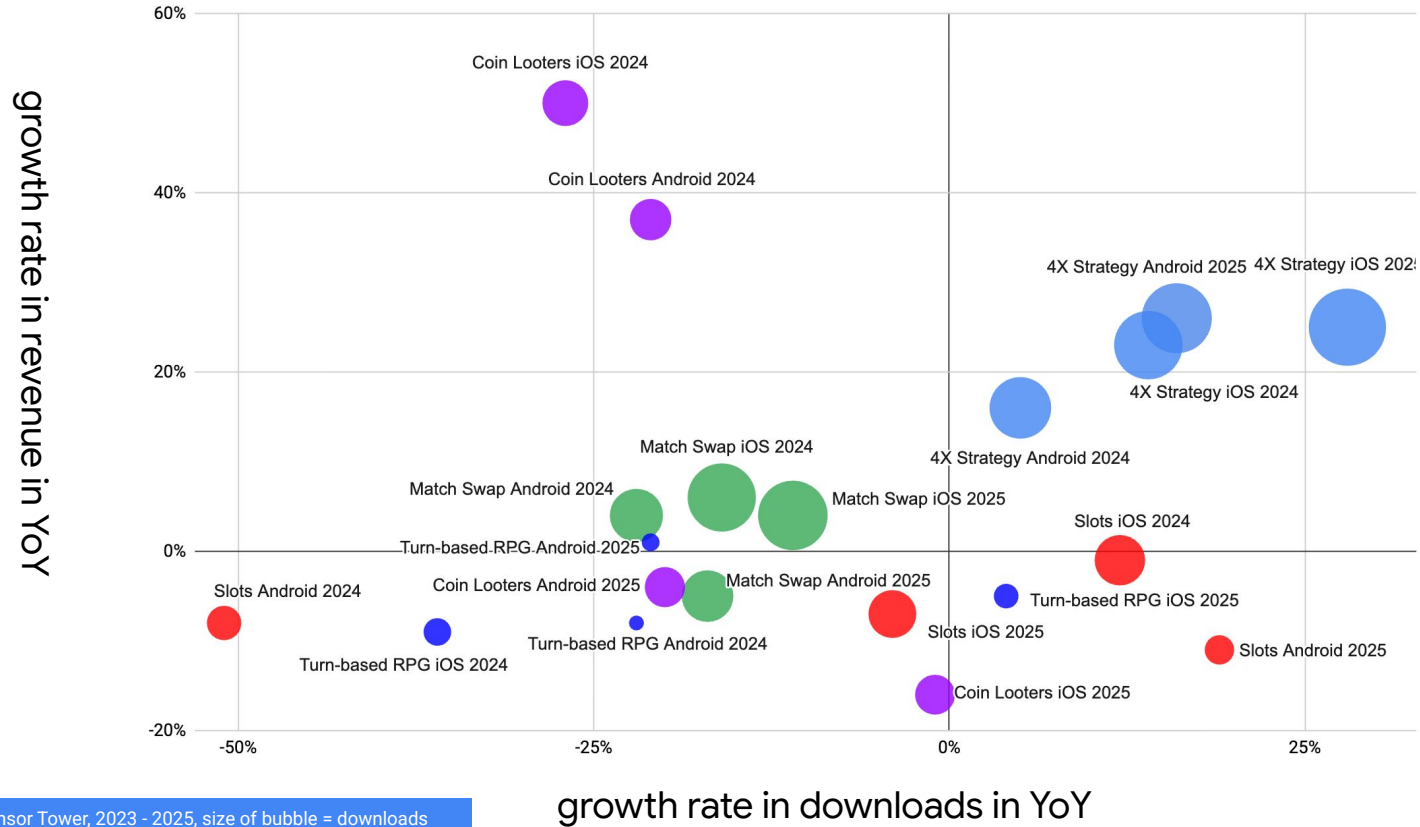
How to read genre and country reports?

- Each bubble with the date 2025 shows growth rate for a specific genre in 2025 (Q1 - Q4 2025 vs Q1 - Q4 2024)
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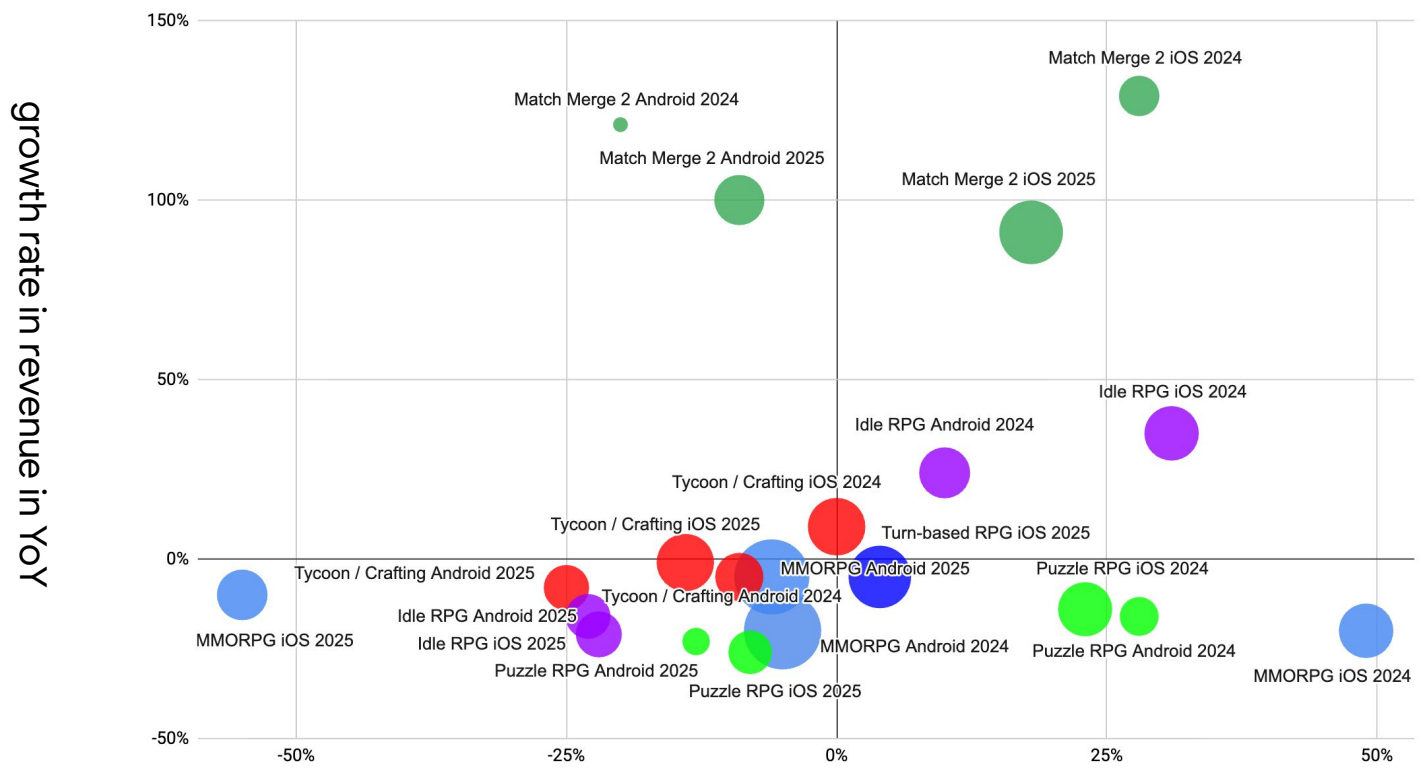
In some categories 2025 data shows stronger growth momentum than 2024

(worldwide, 2024 vs 2025 and 2023 vs 2024, size of bubble = revenue)



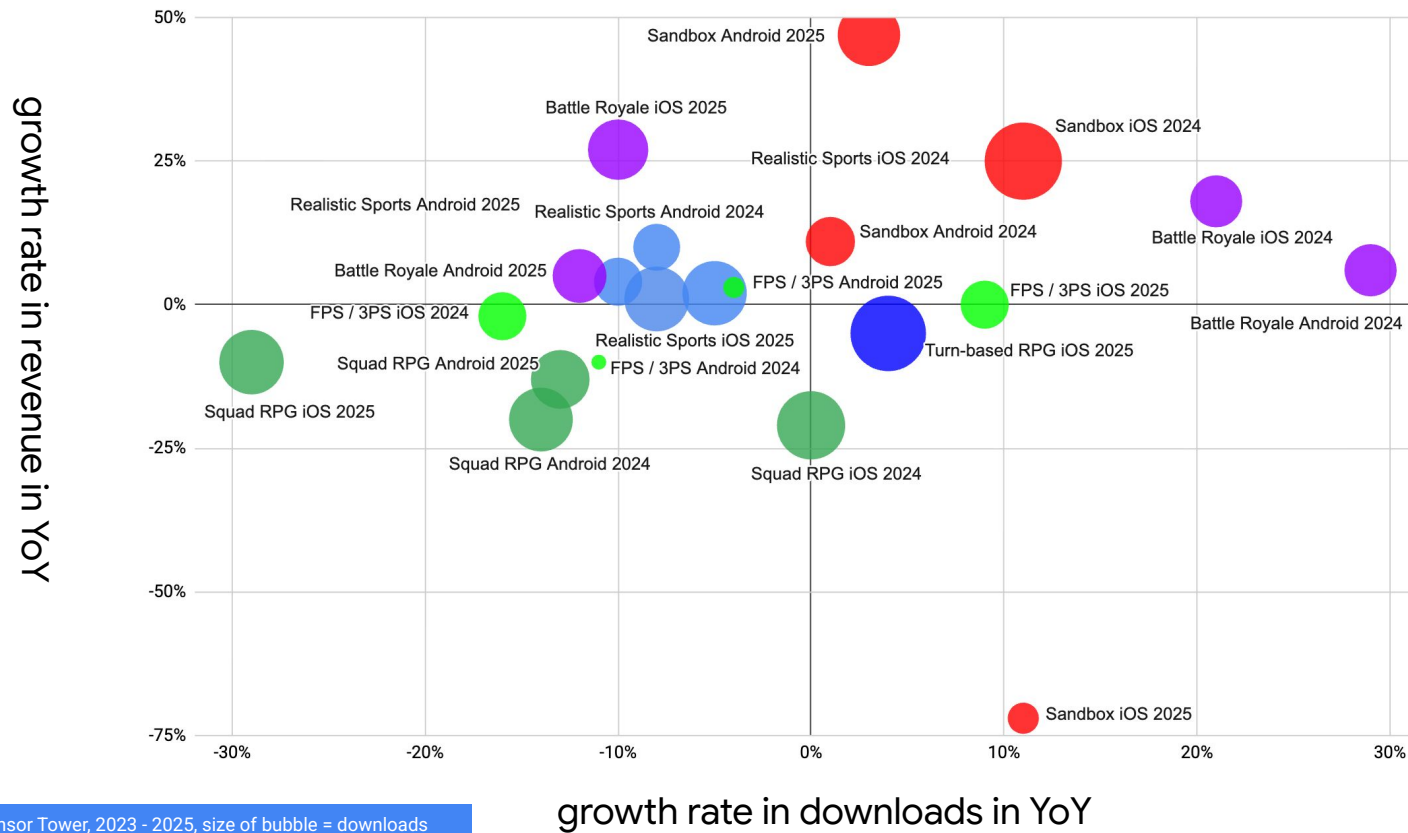
In most categories revenue grows faster than downloads

(worldwide, 2024 vs 2025 and 2023 vs 2024, size of bubble = revenue)



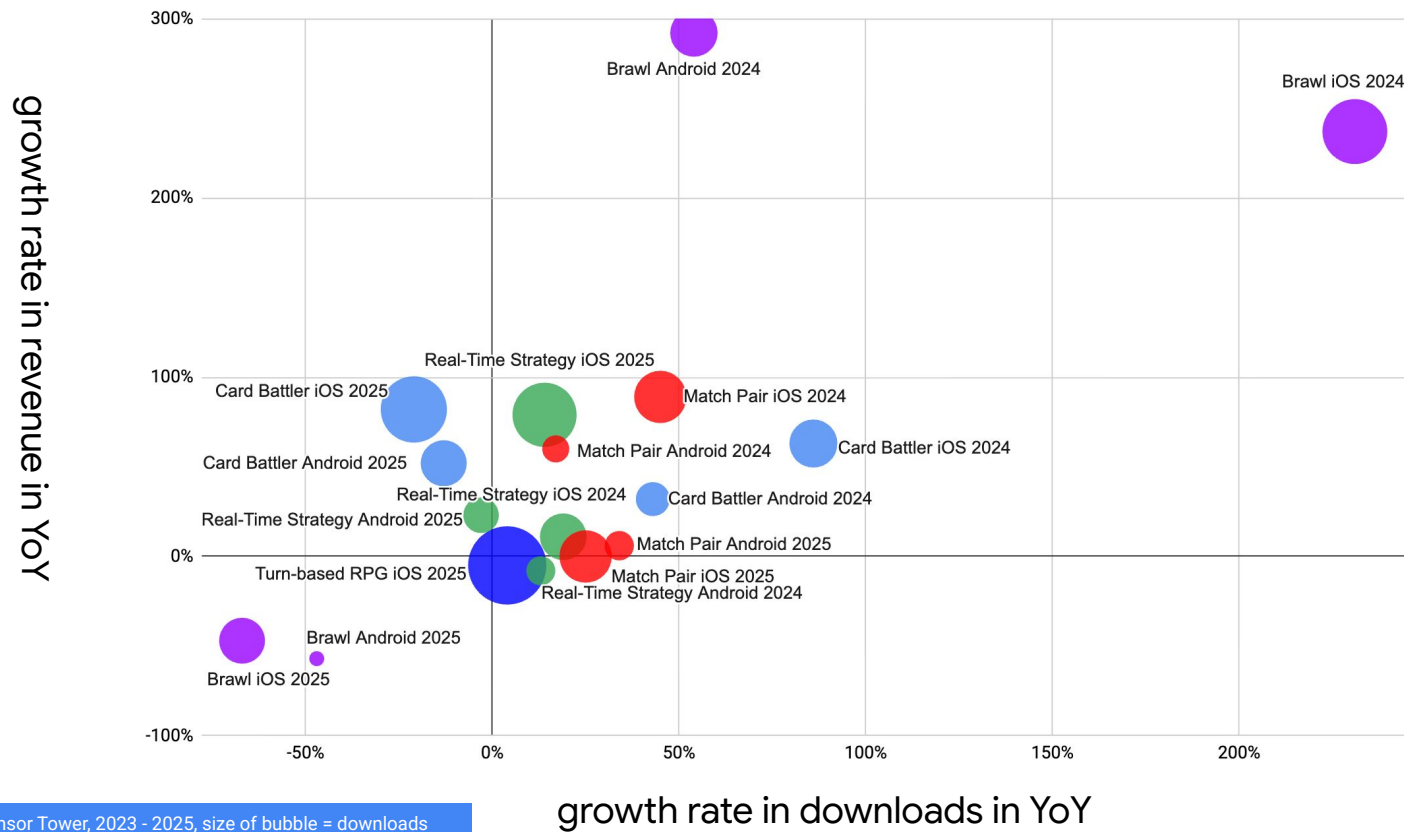
We need to remember that data does not include D2C revenue

(worldwide, 2024 vs 2025 and 2023 vs 2024, size of bubble = revenue)

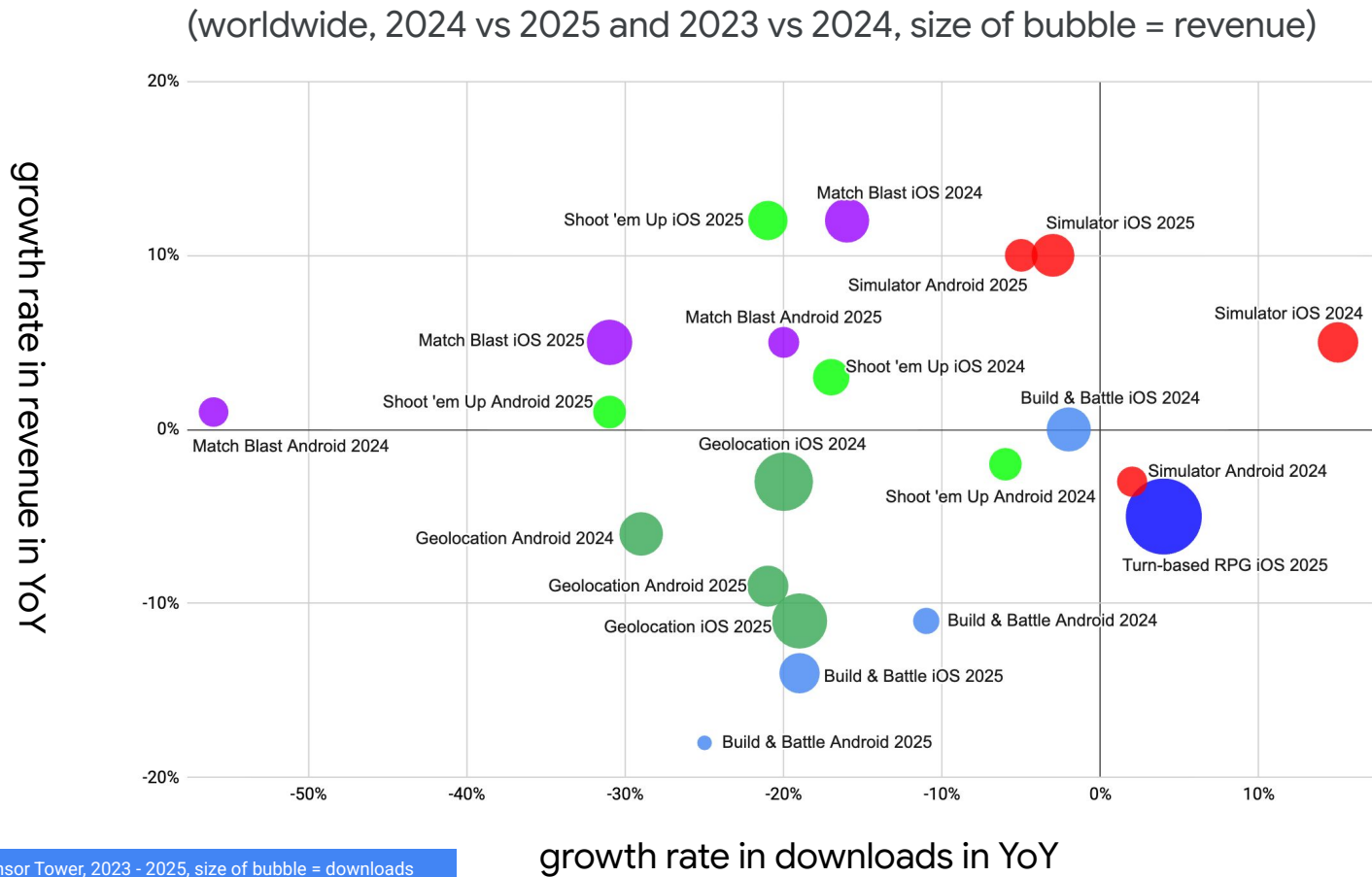


Some games created new subgenres...

(worldwide, 2024 vs 2025 and 2023 vs 2024, size of bubble = revenue)

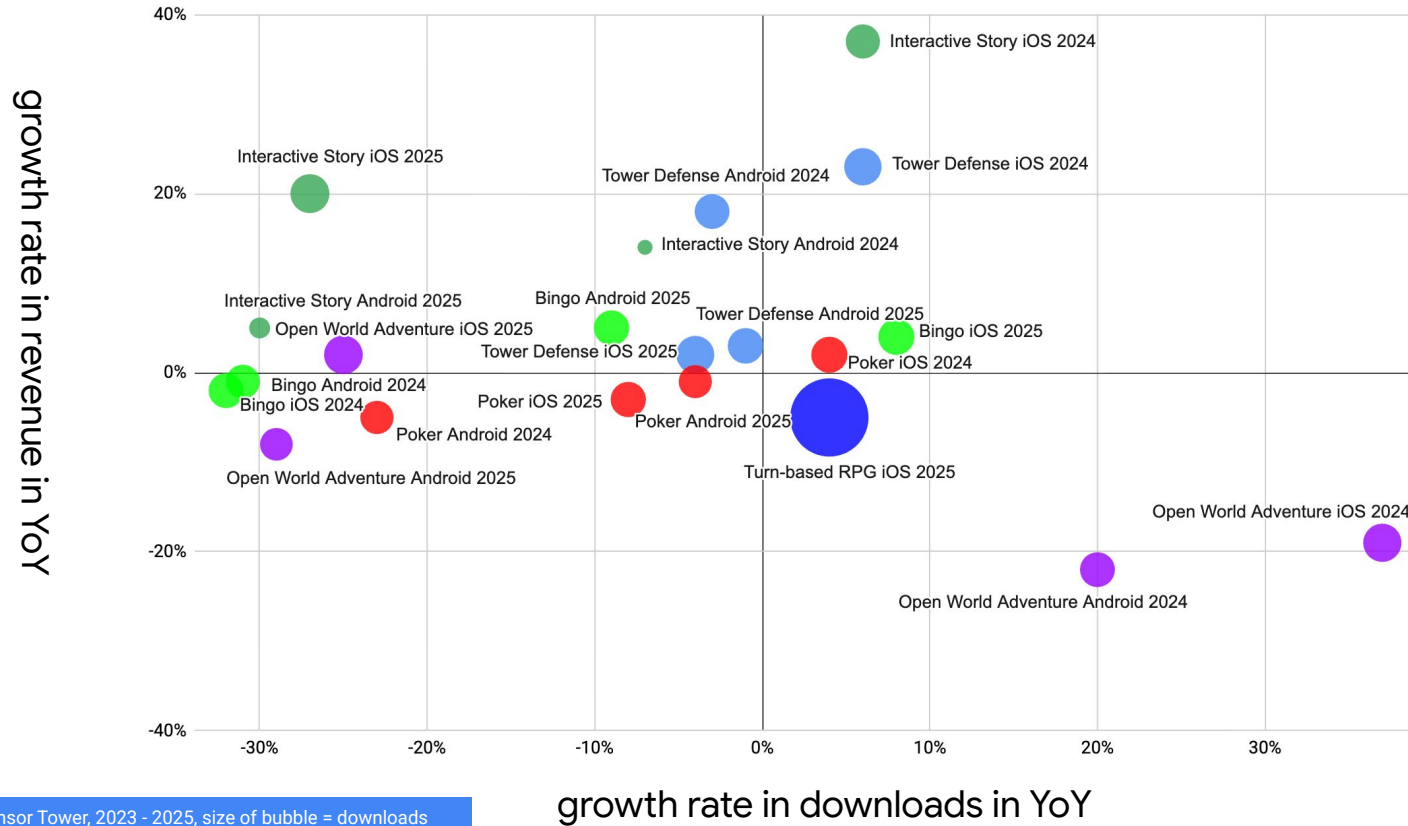


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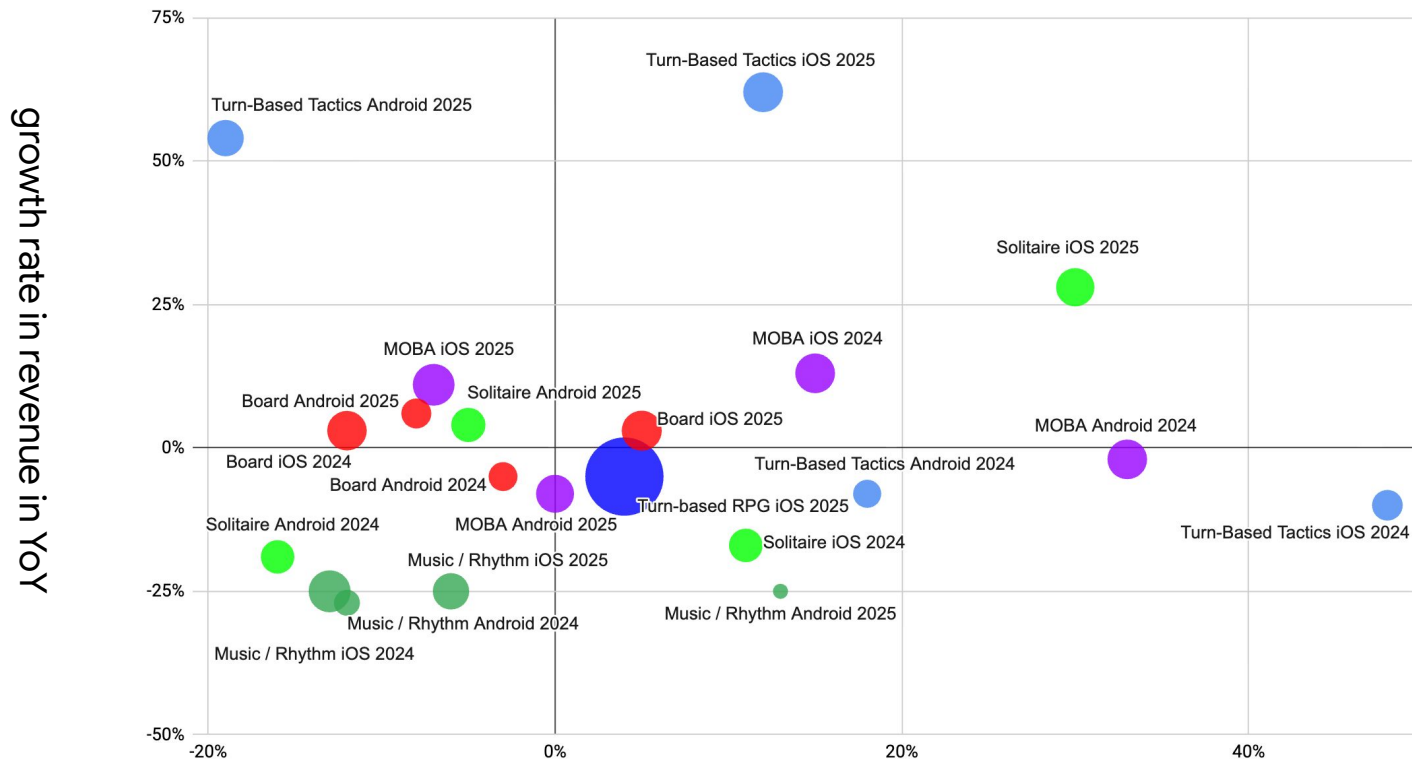
Changes in small subcategories can be high, driven by just a few games

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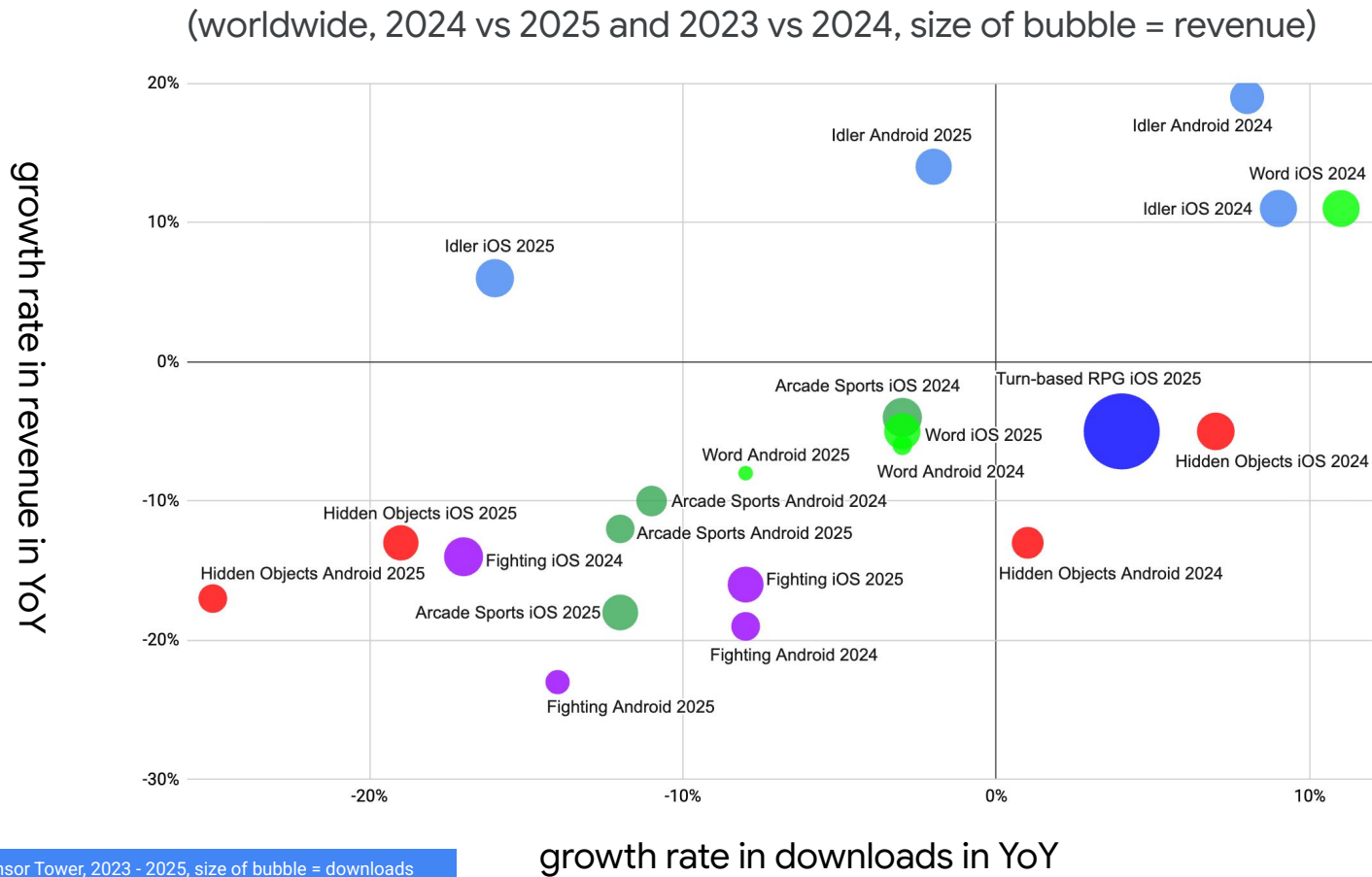


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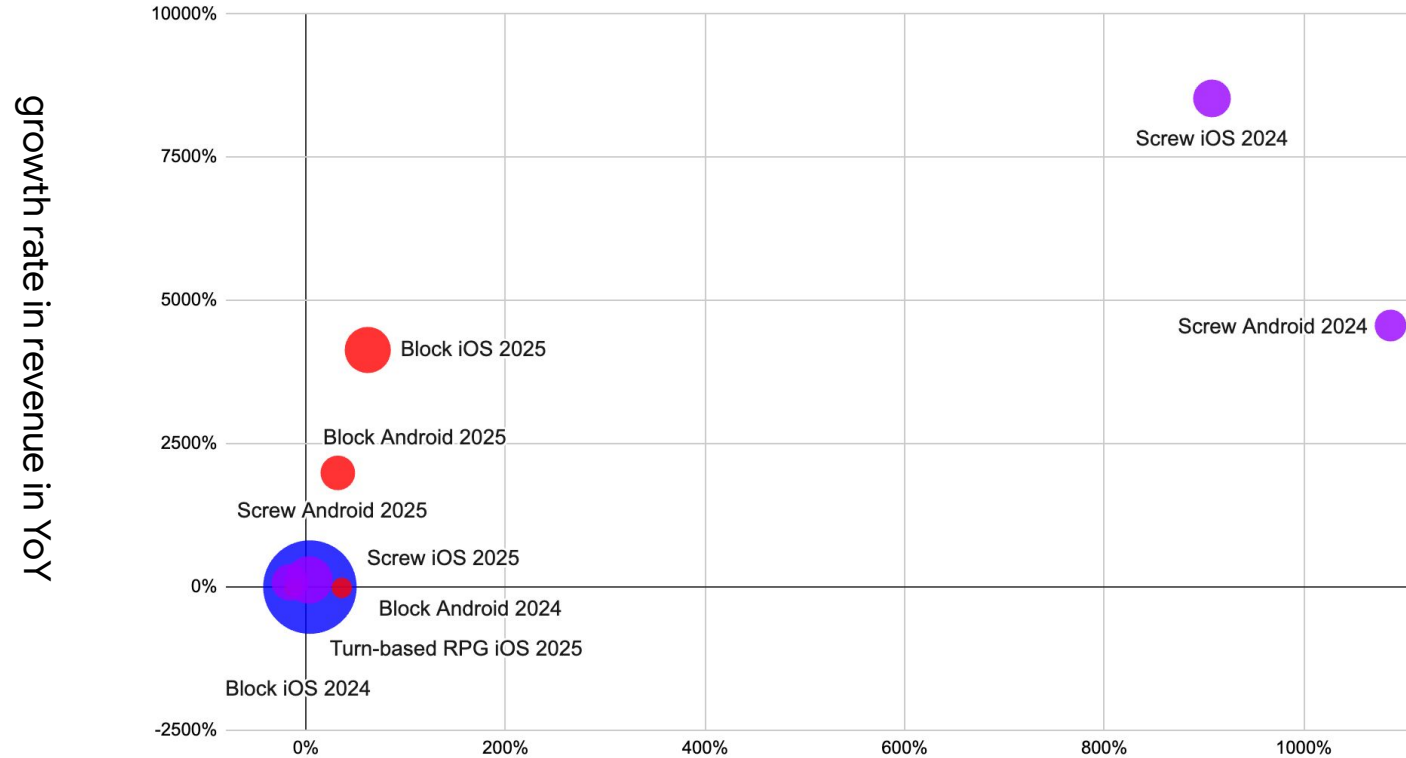


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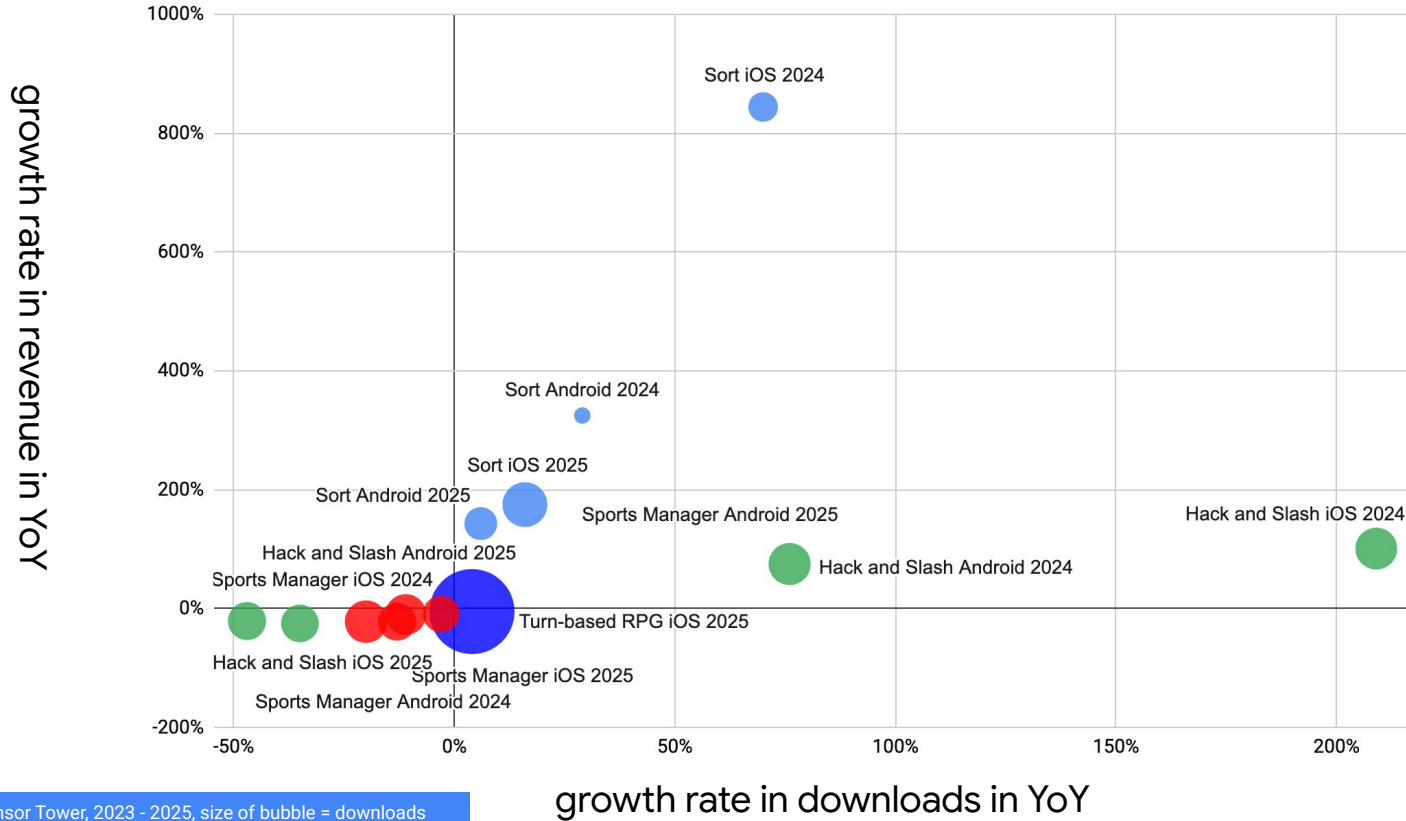
(worldwide, 2024 vs 2025 and 2023 vs 2024, size of bubble = revenue)



Source: Sensor Tower, 2023 - 2025, size of bubble = downloads

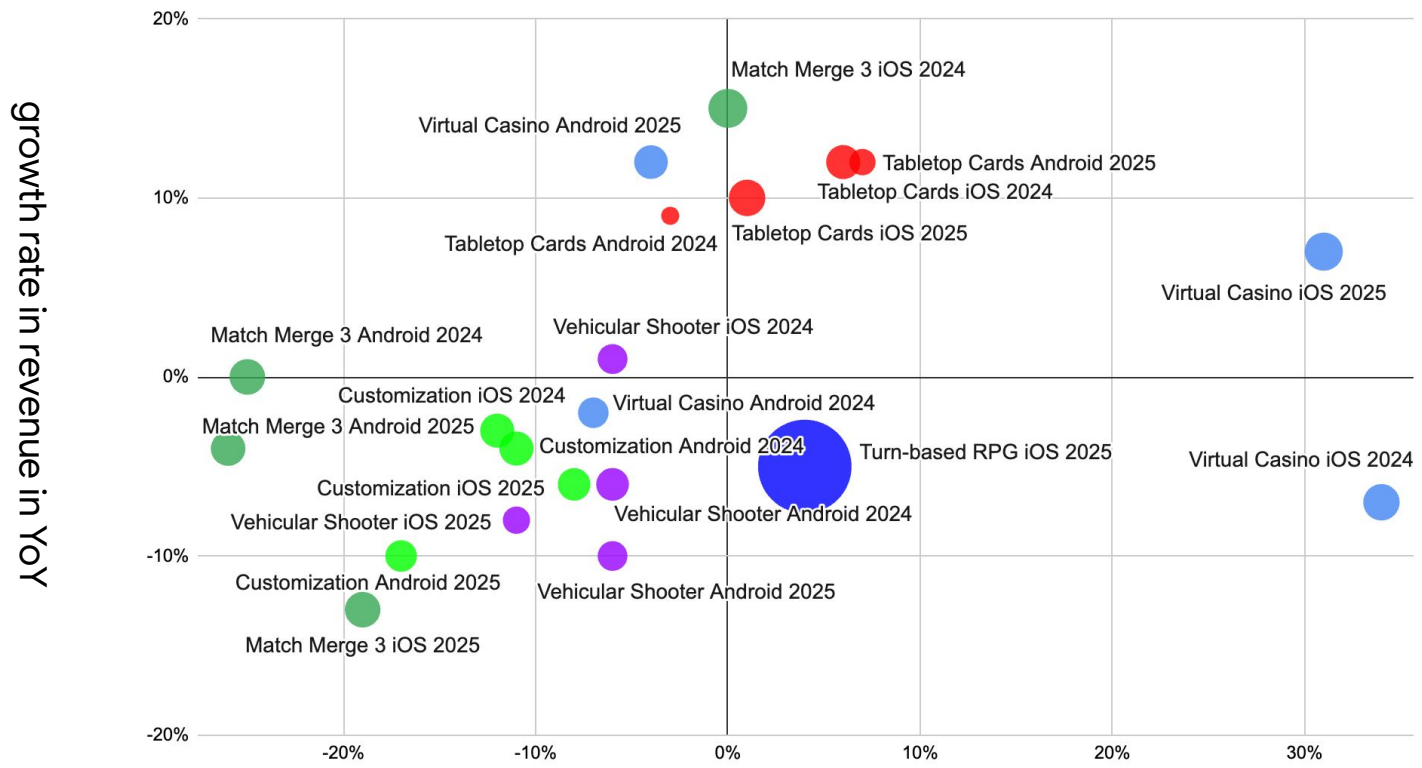
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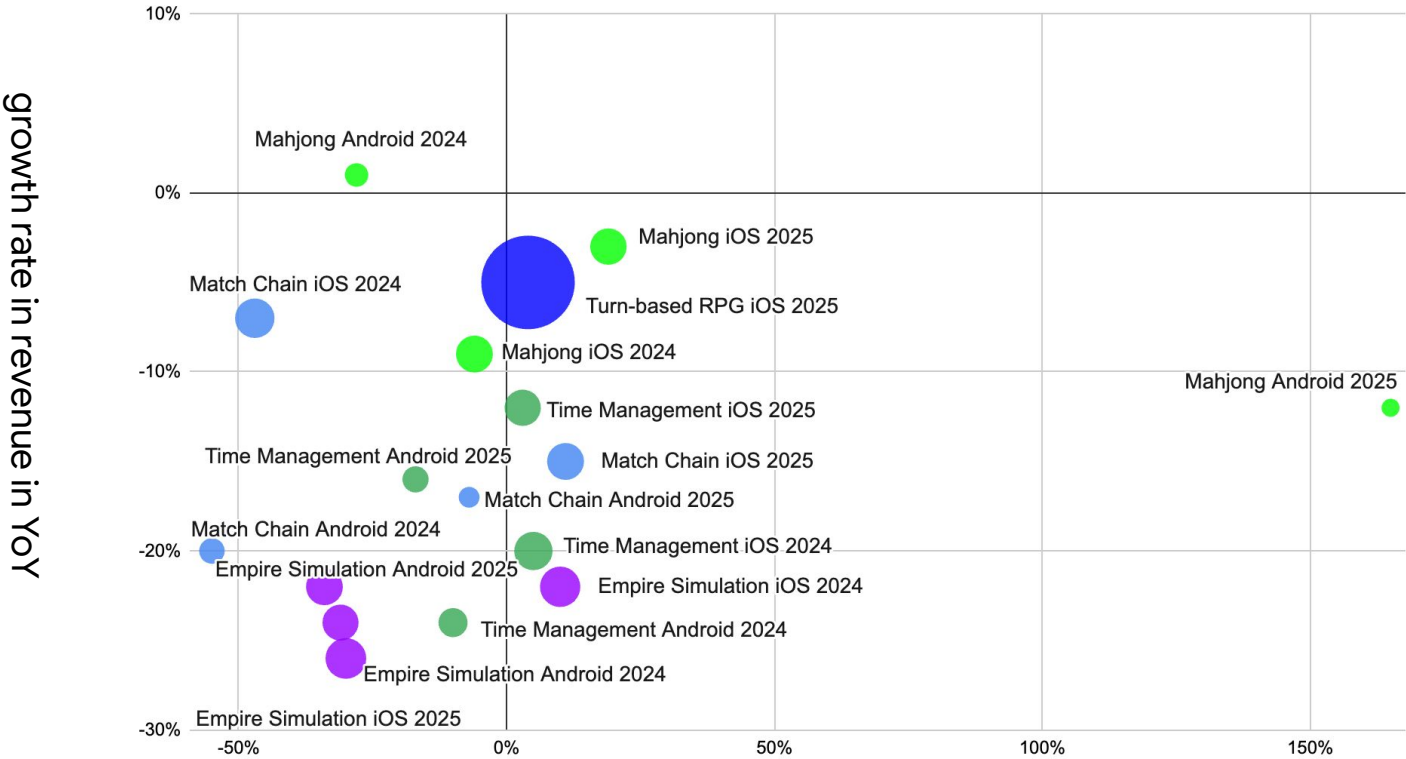
In many countries 2025 data is even stronger than 2024

(worldwide, 2024 vs 2025 and 2023 vs 2024, size of bubble = revenue)



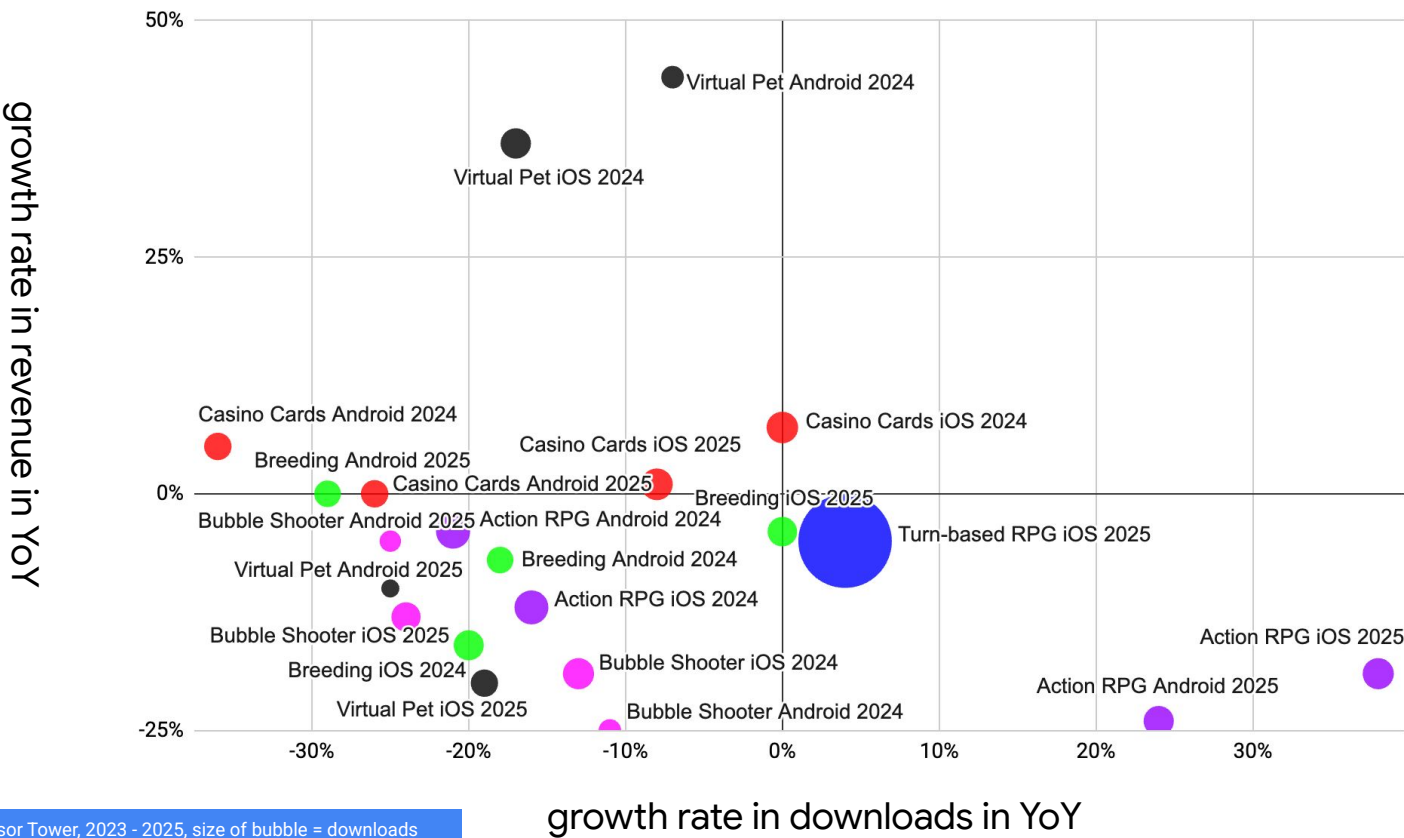
In many countries 2025 data is even stronger than 2024

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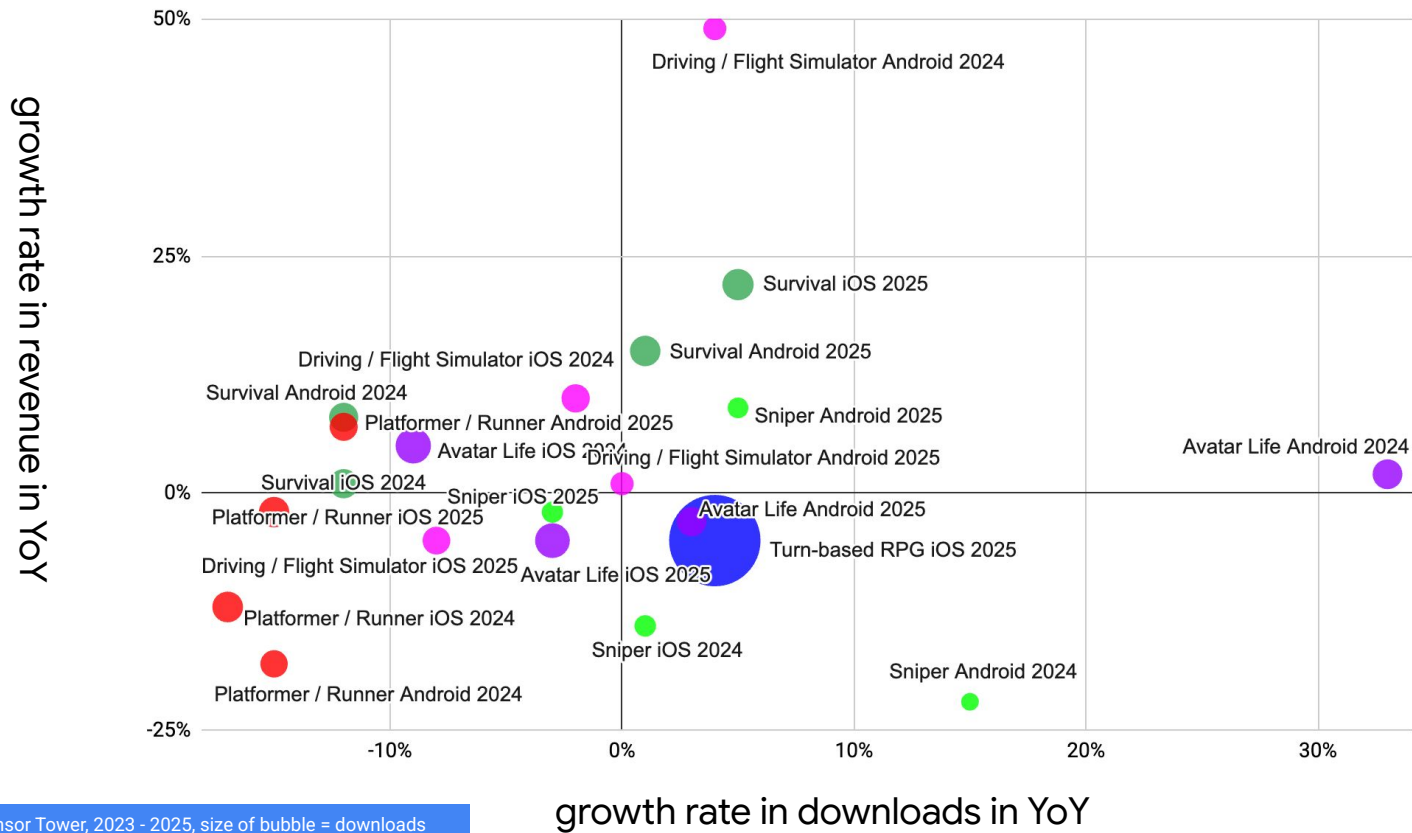
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Country trends in mobile gaming



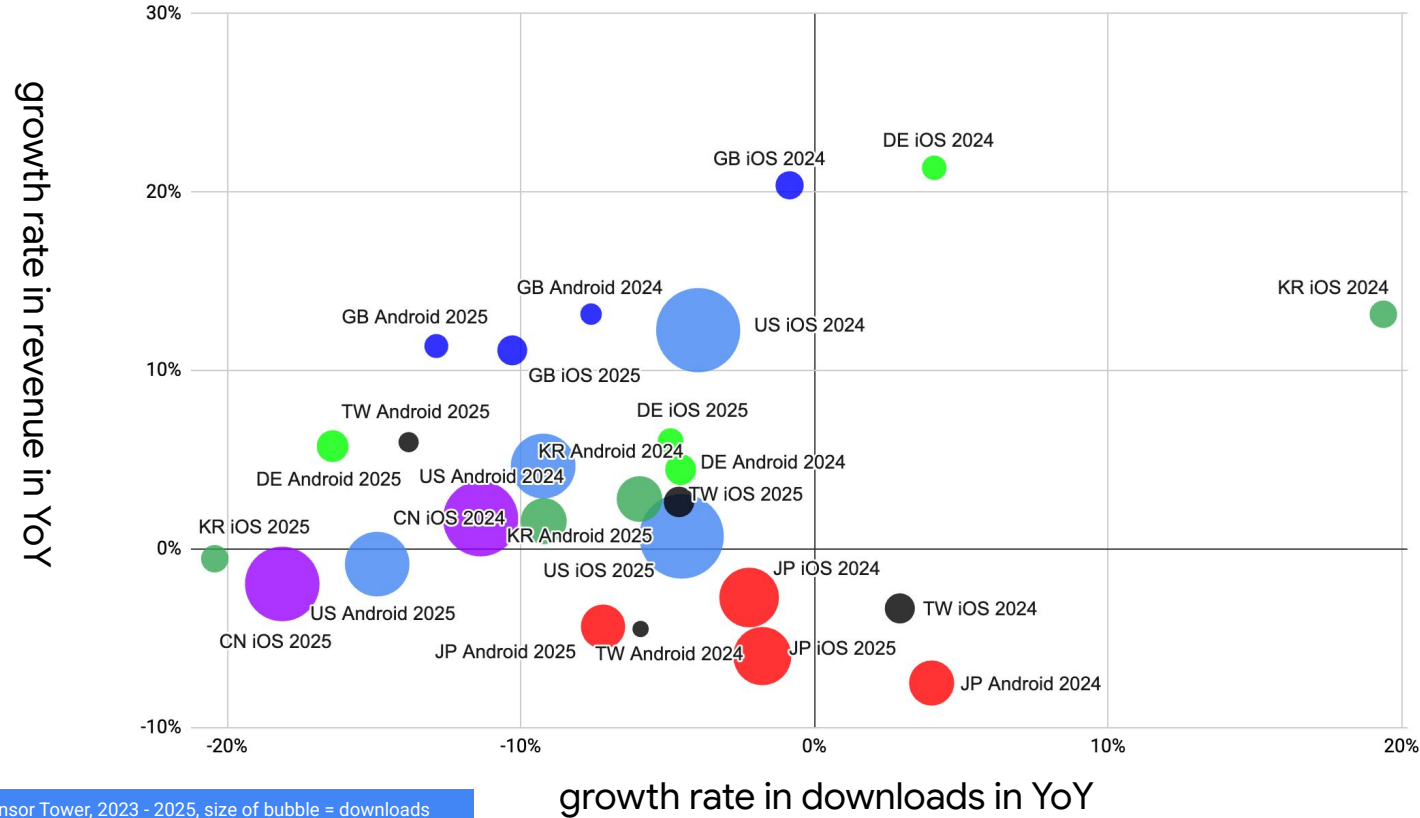
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The U.S. market is slowly declining in importance by revenue, but it is still the largest.

(worldwide, 2024 vs 2025 and 2023 vs 2024, size of bubble = revenue)



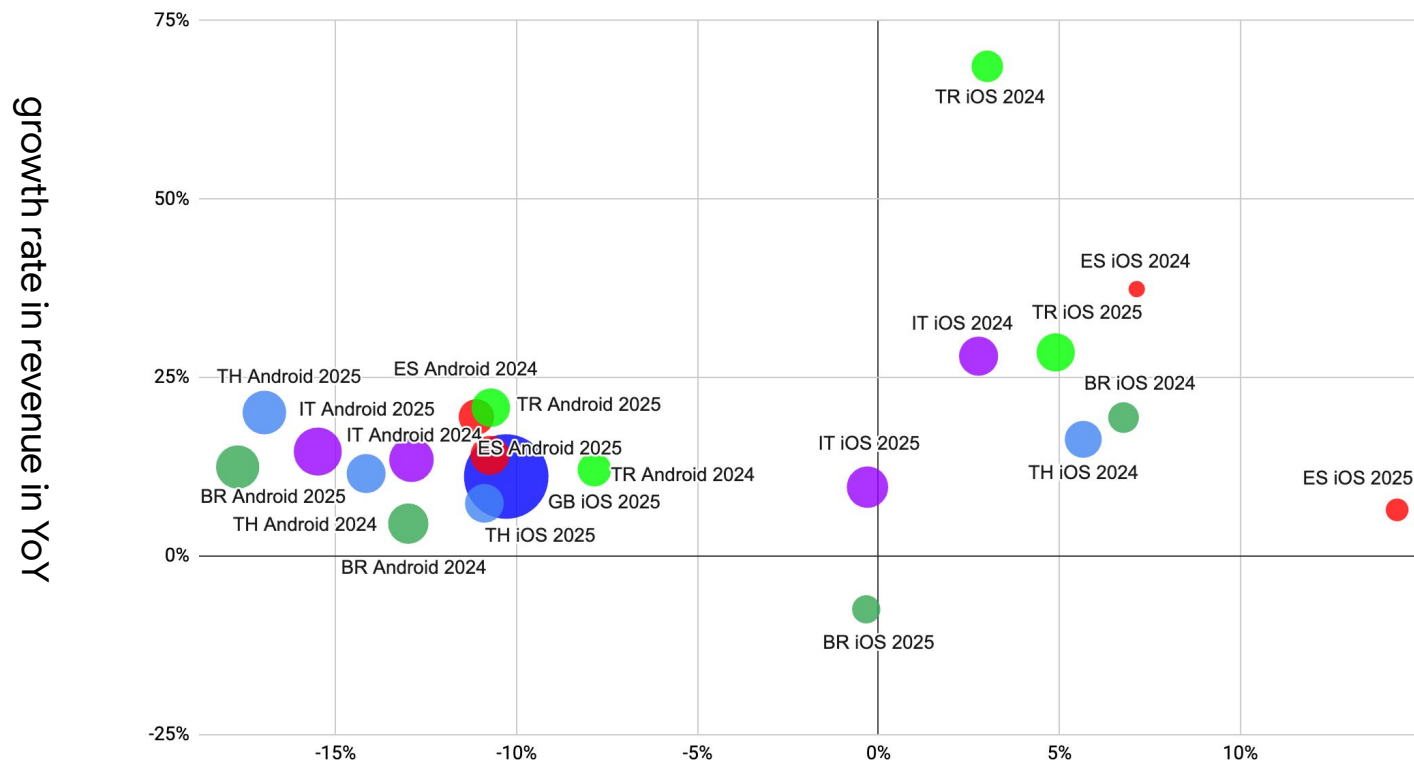
In most countries revenue grows faster than downloads

(worldwide, 2024 vs 2025 and 2023 vs 2024, size of bubble = revenue)



...especially in 2025

(worldwide, 2024 vs 2025 and 2023 vs 2024, size of bubble = revenue)

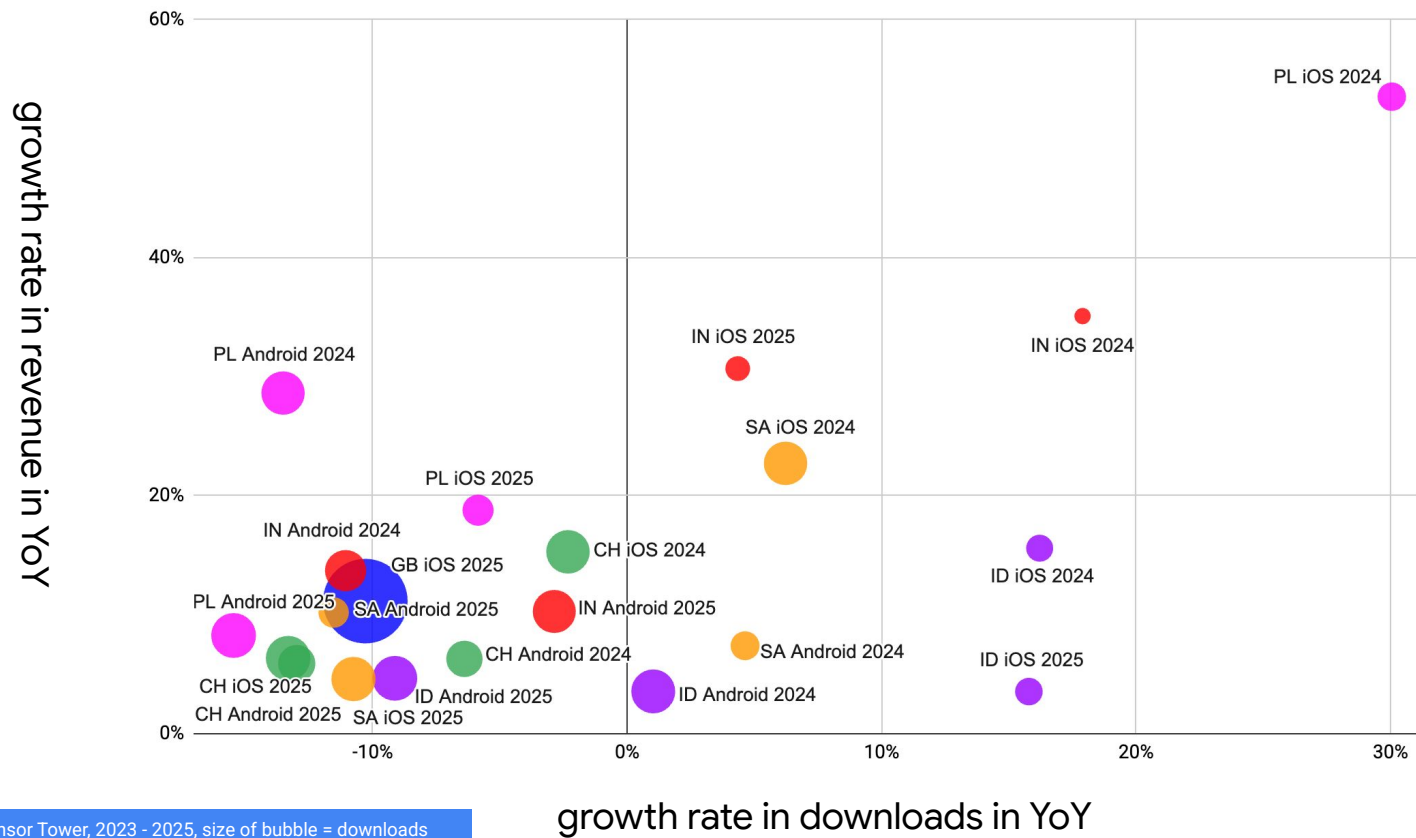


Source: Sensor Tower, 2023 - 2025, size of bubble = downloads

growth rate in downloads in YoY

...and in Android

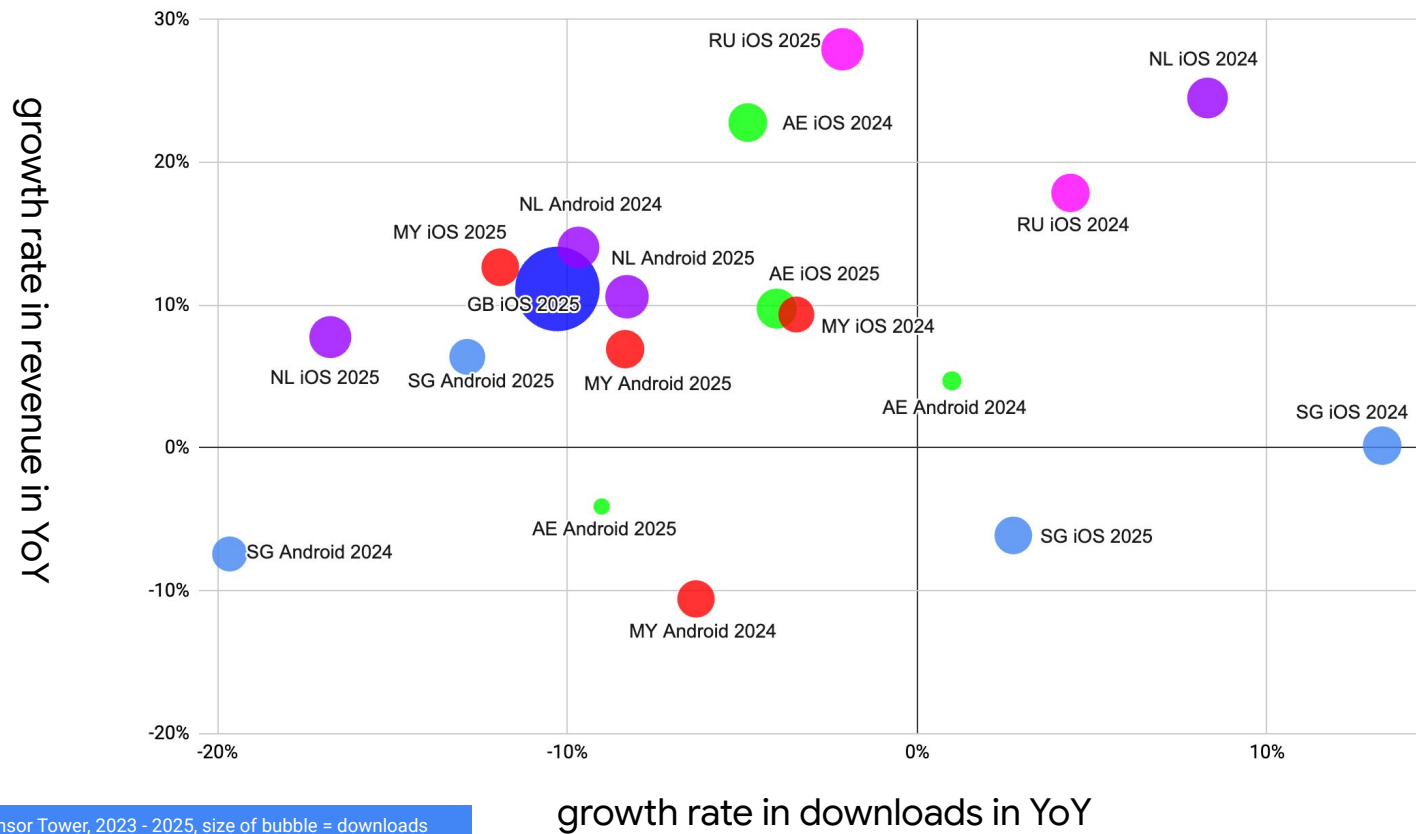
(worldwide, 2024 vs 2025 and 2023 vs 2024, size of bubble = revenue)



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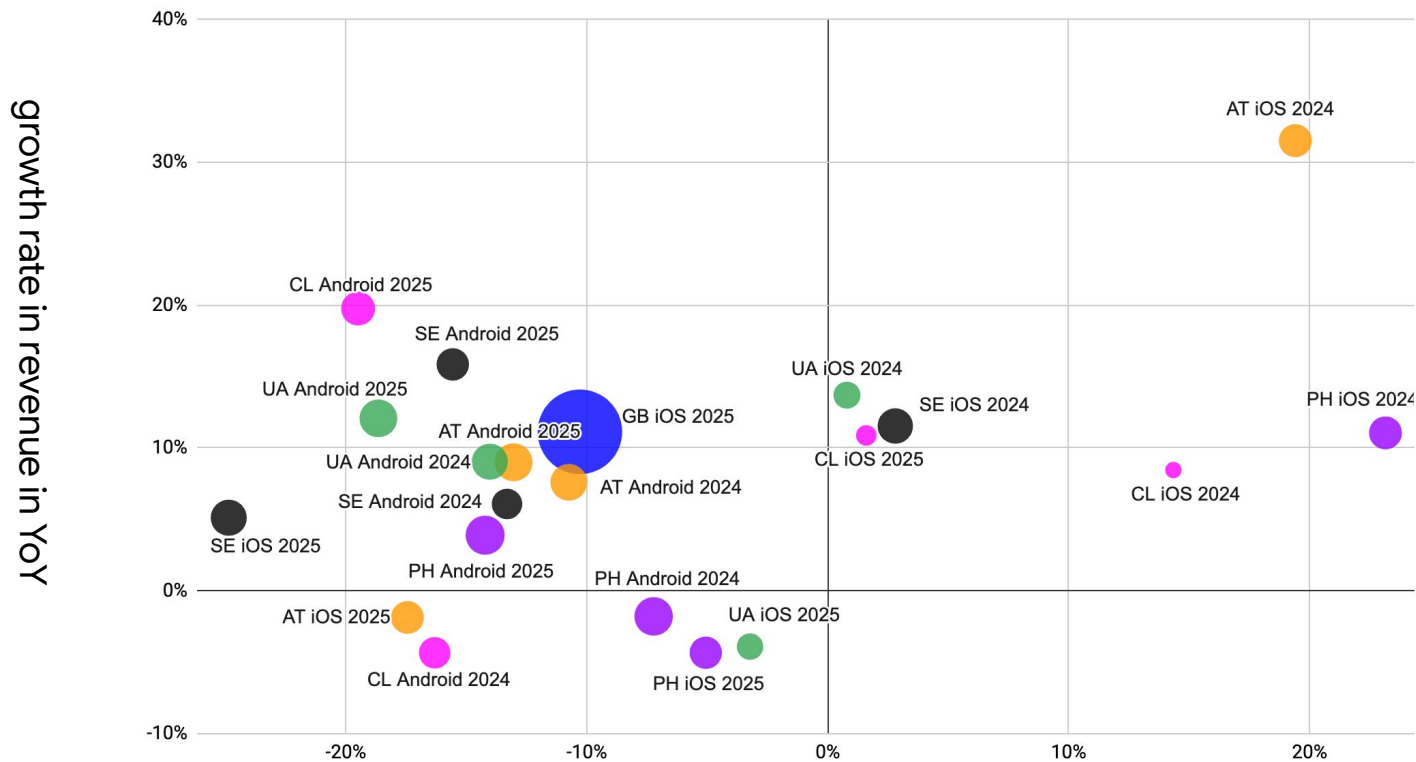
Some countries had significant revenue growth in 2025

(worldwide, 2024 vs 2025 and 2023 vs 2024, size of bubble = revenue)



...although downloads growth was very low across many countries

(worldwide, 2024 vs 2025 and 2023 vs 2024, size of bubble = revenue)

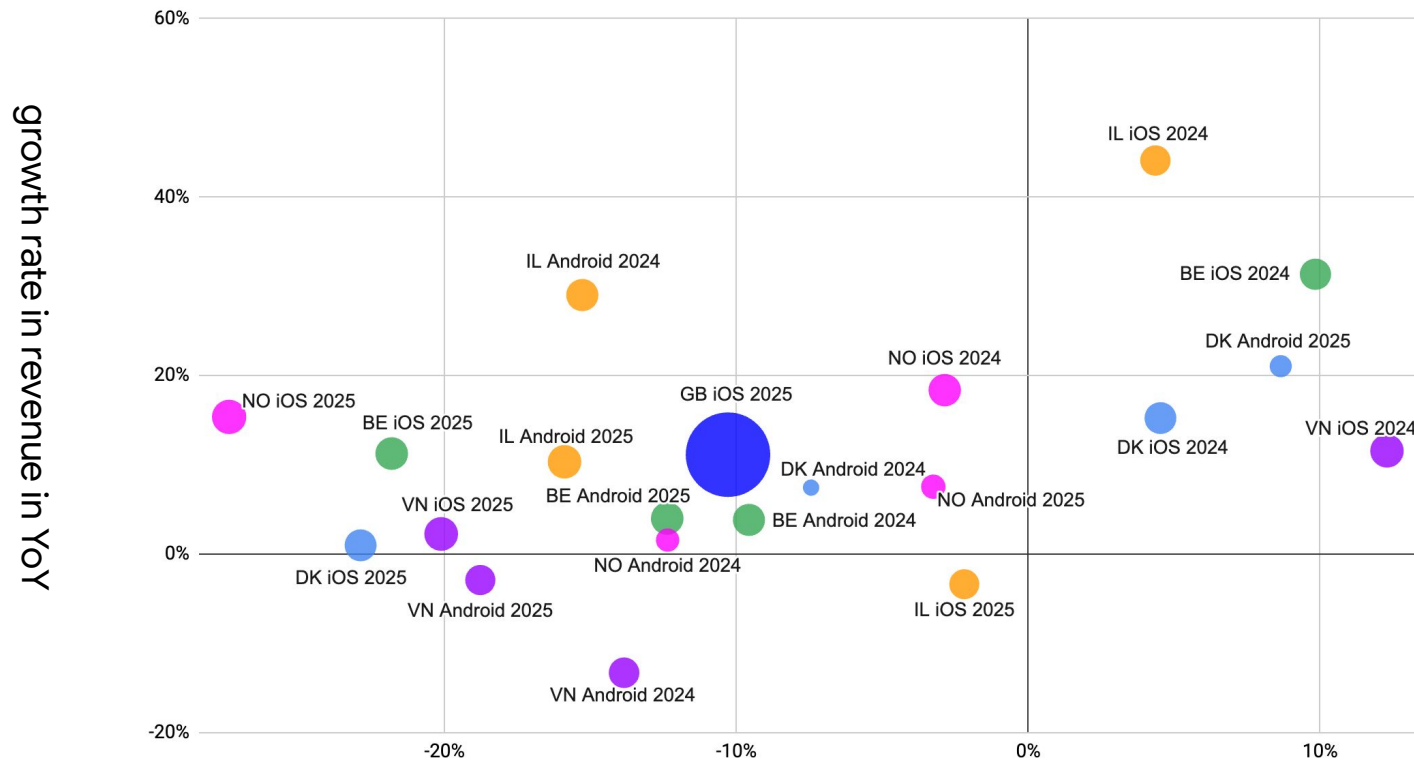


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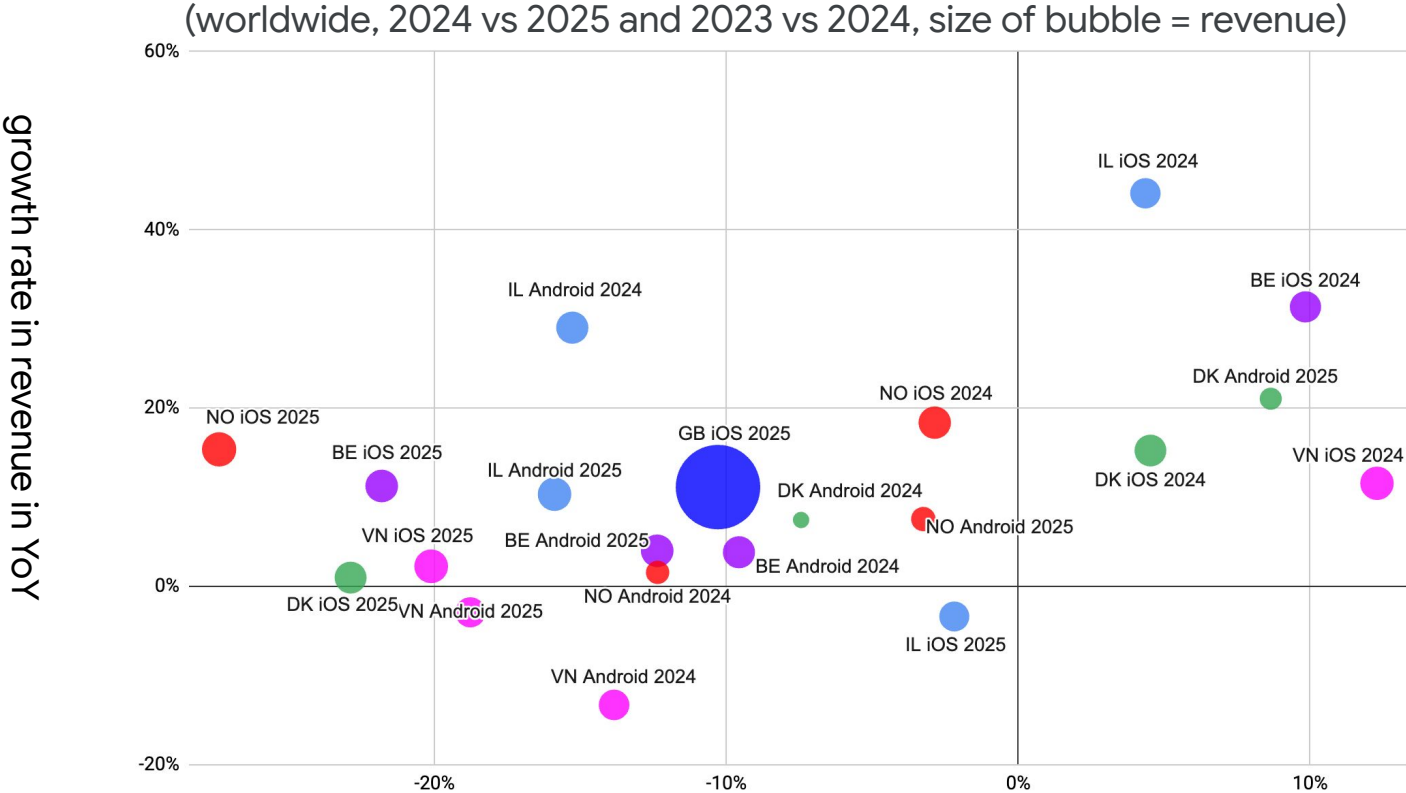
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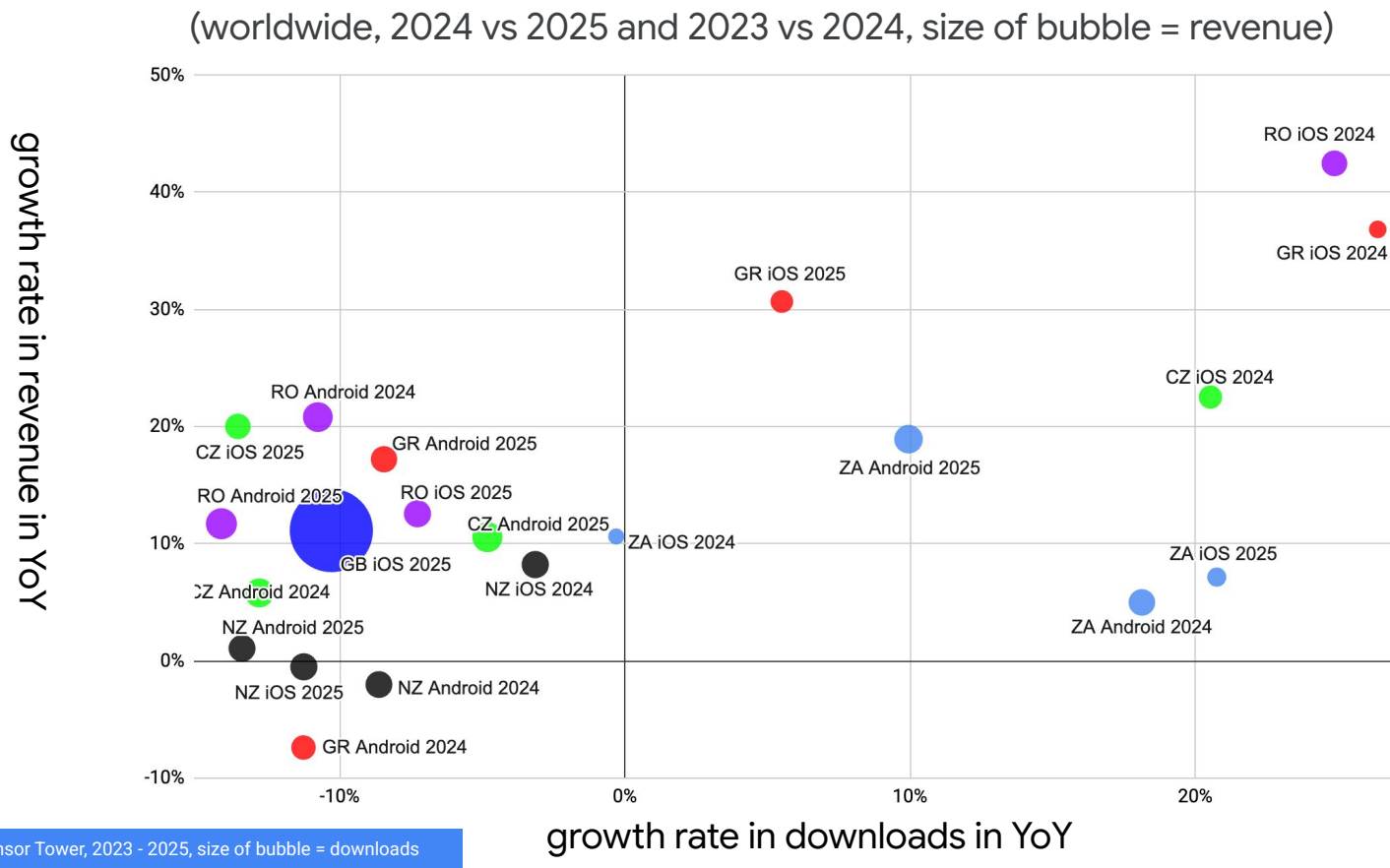
Source: Sensor Tower, 2023 - 2025, size of bubble = downloads

growth rate in downloads in YoY

Smaller markets are dwarfed by the size of GB but contributed significantly to total gaming growth.



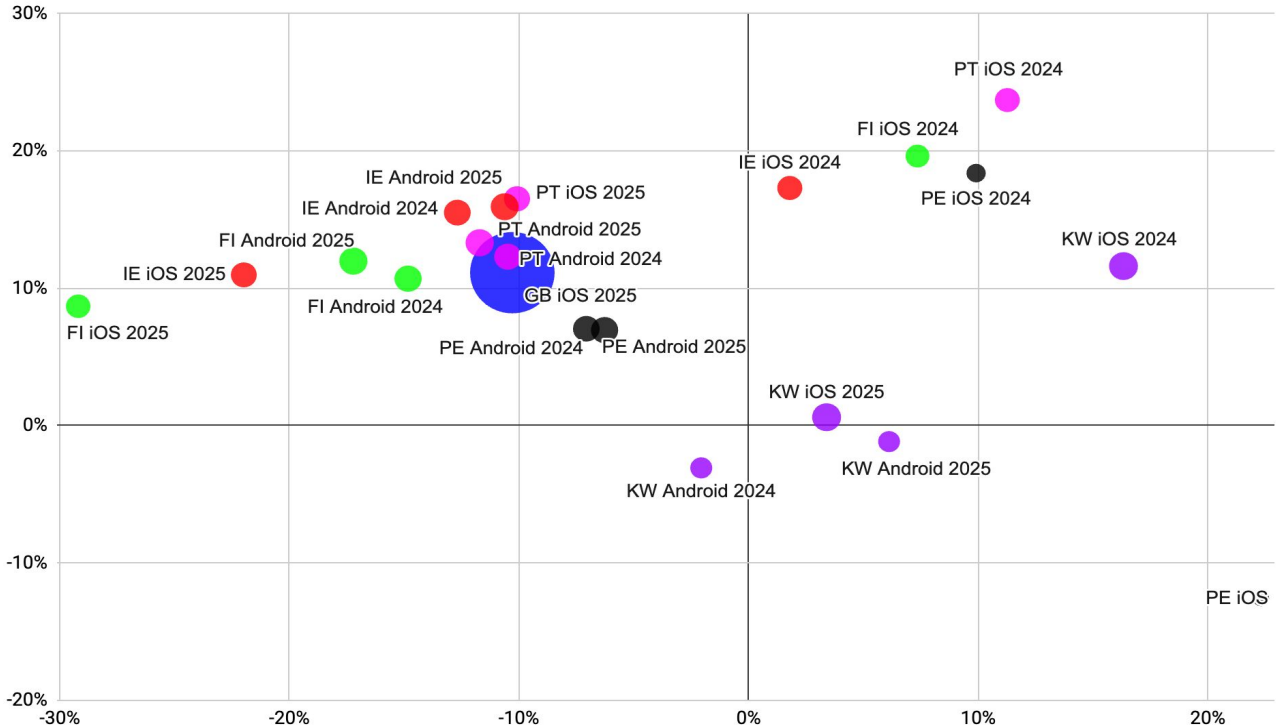
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(world

growth rate in revenue in YoY

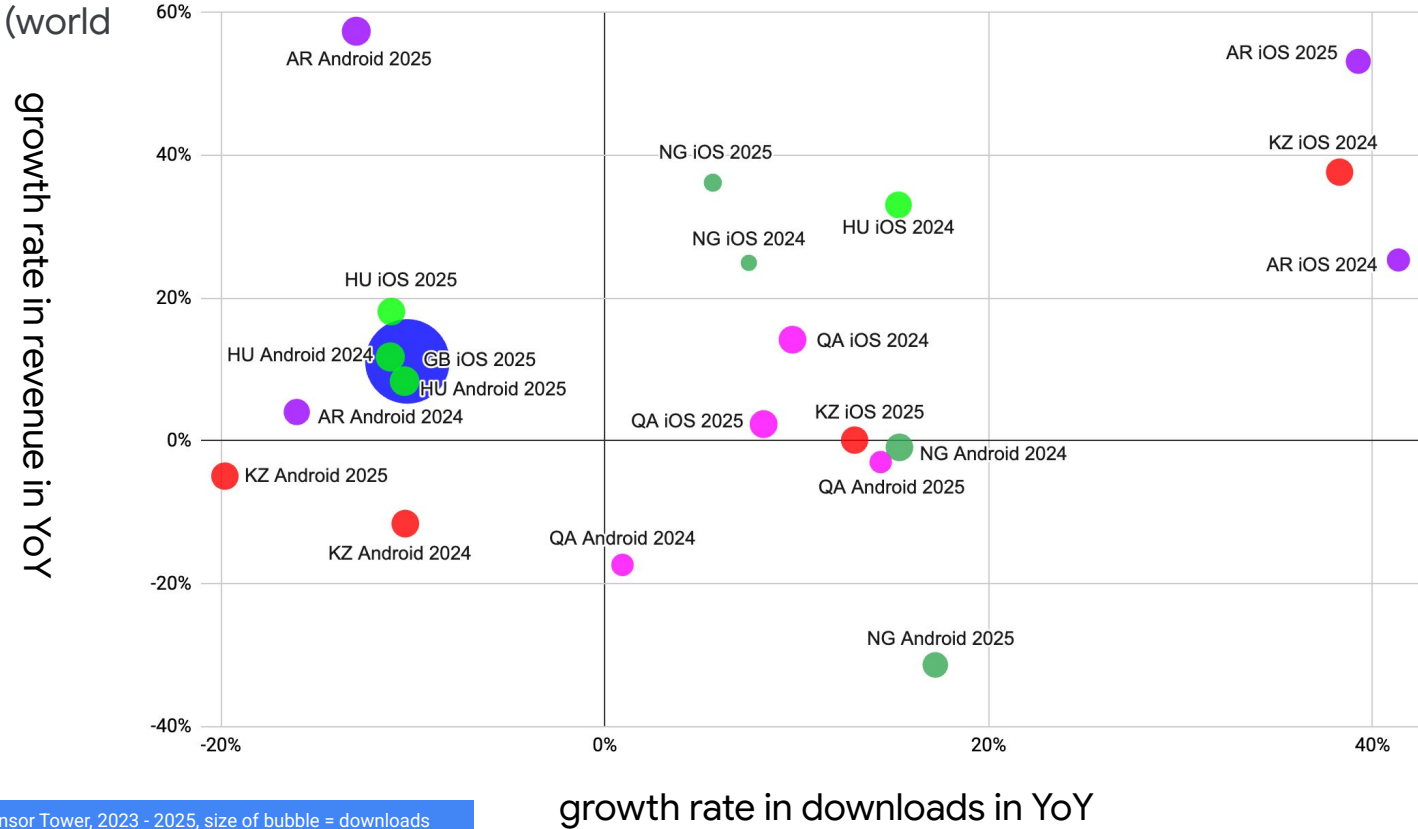


growth rate in downloads in YoY

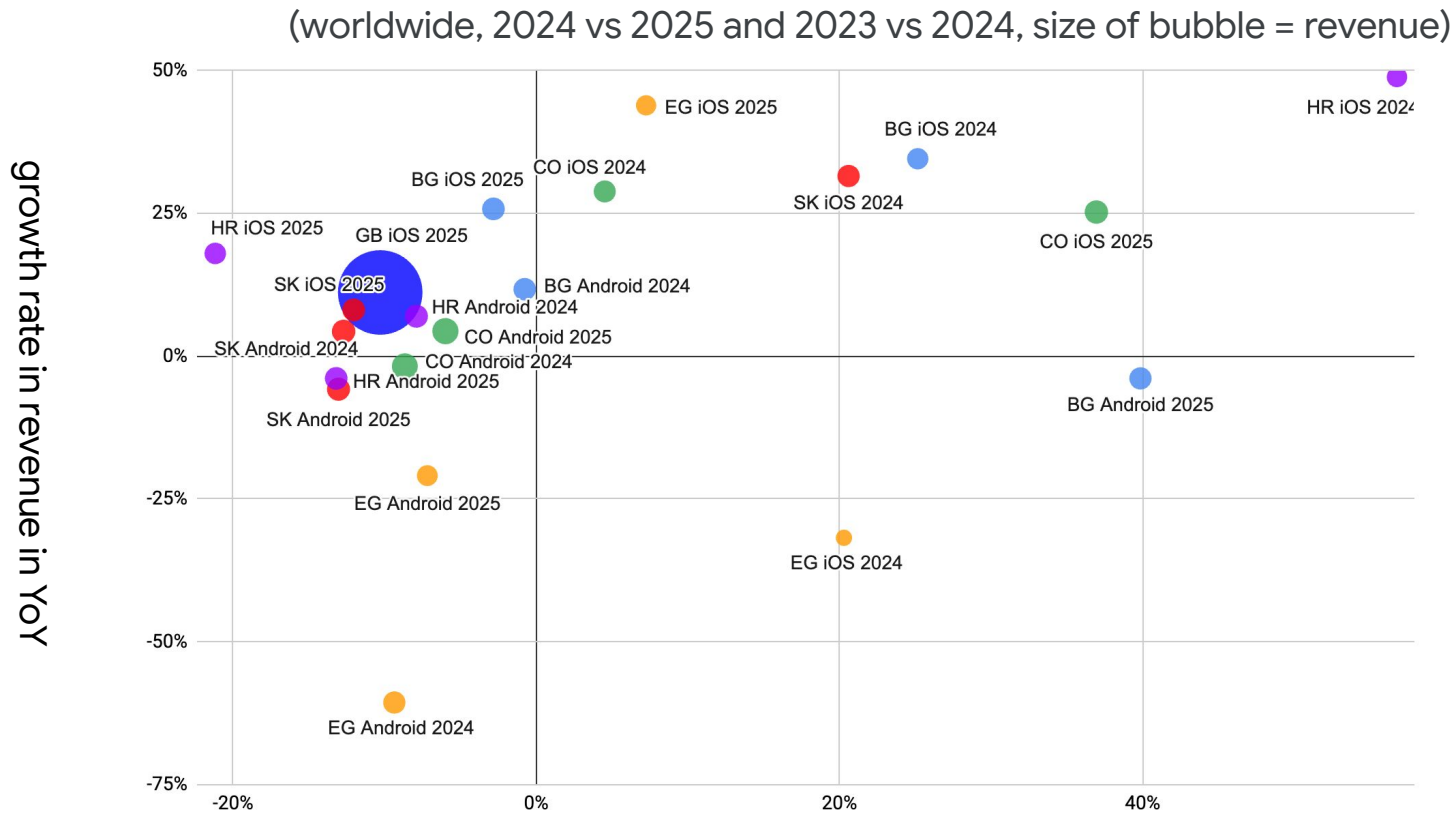


Source: Sensor Tower, 2023 - 2025, size of bubble = downloads

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...although downloads growth was very low across many countries



Source: Sensor Tower, 2023 - 2025, size of bubble = downloads

growth rate in downloads in YoY

Summary

1. Market Resilience and Cross-Platform Growth

- Sector Stability: Gaming—particularly mobile—shows no signs of slowing down; the industry continues to outperform previous growth estimates.
- User Depth: The proportion of "heavy users" is rising globally, signaling a highly engaged core audience.
- Cross-Platform Integration: Cross-device gaming is moving from a niche concept to a mainstream reality,

2. Business shifts

- Emerging markets are the primary drivers of user growth on both Android and iOS
- Revenue remains heavily concentrated in Western markets, despite emerging markets driving volume
- iOS Dominance in UA: Despite Android's global footprint, iOS continues to command a disproportionately high share of User Acquisition (UA) spend in many regions.

3. Competition and Monetization Trends

- Games must compete against a wide range of digital entertainment for user time and money.
- Revenue Concentration: The mobile sector has seen a significant "winner-take-all" trend, with revenue becoming increasingly concentrated among top-tier titles over the last few years.
- Diversification: Non-gaming app categories are experiencing robust growth, capturing a larger share of the overall mobile market.



About author

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CEE Mobile Gaming and Apps Lead, Google

