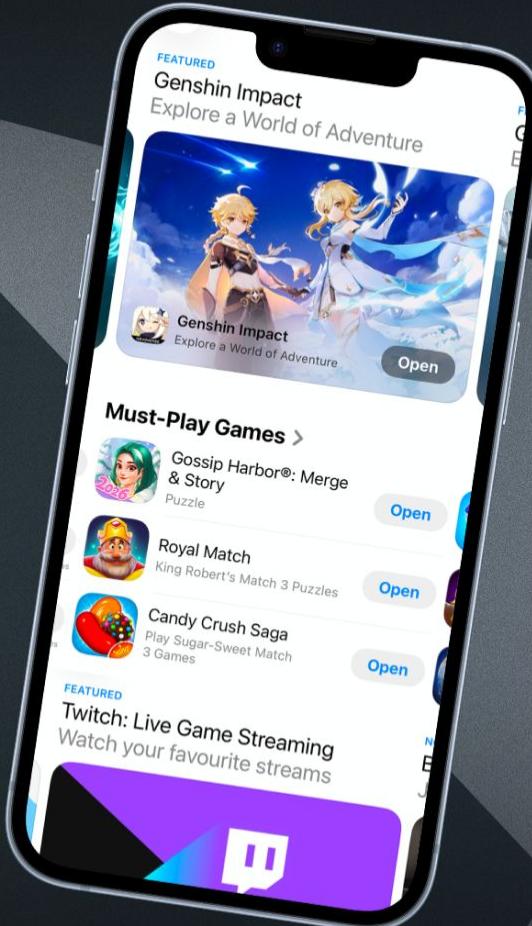




# Mobile Market Landscape 2026

★ Report



# Key takeaways

## Market saturation is accelerating fast

Releases grew +25% YoY to over 1.4M in 2025, but only ~10% of them capture user attention. Visibility is getting harder to win.

## Games are claiming an even larger share

The share of gaming apps out of all apps released rose from 63% (2024) to 72% (2025), intensifying the competition in gaming.

## Apps overtake games in revenue figures

In September 2025, apps surpassed games in revenue (\$4.8B vs \$4.5B). The gap continues to widen despite seasonal slowdown.

## App market growth continues to accelerate

Compared to 2024, apps picked up +11.9% in downloads and +19.1% in revenue in 2025. Growth remains broad across categories.

## Generative AI is the biggest standout

Generative AI jumped +178% in downloads and +273% in revenue in 2025. It is the clearest structural shift in the market.

## LATAM saturates, monetization keeps rising

Several LATAM (Latin American) markets show downloads decline in the range of -2% to -6%, while revenue continues to grow. Growth is shifting from scaling to monetization.

## Europe leads revenue growth among top markets

Germany, France, and the UK posted strong revenue gains (roughly +18% to +56%), making Europe the key growth driver.

## AI is a new mainstream in gaming ads

56% of the top 100 grossing mobile games used AI to produce ad creatives in 2025. AI-driven advertising is now a standard practice.

# What is AppMagic?



AppMagic is an all-in-one market intelligence platform for games and apps across mobile and PC, built to help you run deep market research in seconds.

It delivers actionable insights that help developers, publishers, and marketers stay ahead of the competition, spot growth opportunities, and maximize revenue.



With 20+ powerful tools and 500+ tags for a precise filtering of data, AppMagic provides access to a massive database of 15M+ mobile apps, 5M+ publishers, 130K+ Steam titles, 230M+ ad creatives, and 140 ad networks.

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

# Our customers

We work with **350+** companies, including:





# AppMagic Introduces Steam Analytics

Get comprehensive insights into the Steam market  
and your competitors

[Click here to learn more](#)



COMING  
SOON



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# Methodology

The report is based on AppMagic data for 2023–2025, providing an overview of global trends. It covers the App Store and Google Play markets and does not include other app distribution sources. For distinction purposes and where context demands it, we refer to non-gaming and gaming apps, respectively, as apps and games.

## Key premises:

---

### 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. Downloads and revenue data for China are available for the App Store platform only.

### How are the payment behavior metrics and D2C revenue calculated?

D2C revenue and payment metrics are calculated based on AppMagic's internal analytics and include data for the United States only.

You can find more details on the chart calculation methodology in the footer of each slide.

Data recorded on January 15, 2026

# Global Trends

# Key takeaways

## Market saturation is accelerating fast

Releases grew +25% YoY to over 1.4M in 2025, but only ~10% of them attract user attention.

## Games are claiming an even larger share

The games' share of the total releases increased from 63% in 2024 to 72% in 2025

## Apps overtake games in revenue

Apps surpassed games in September 2025, generating \$4.8B versus \$4.5B. The gap continues to widen despite a seasonal slowdown.

## Indonesia sees strong growth in downloads

Among the top five largest countries, Indonesia shows strong growth, with downloads up 10%.

## Top countries are growing, driven by apps

Many top-grossing countries, such as China, Japan, Germany, and the UK are seeing strong revenue growth.

## Latin America is saturating

Many Latin American countries, including Colombia, Ecuador, and Peru, are seeing a decline in downloads.

## Spain and the UAE lead revenue growth

They show the largest YoY gains at 46% and 42%, while France and Italy deliver steadier, more moderate growth typical of mature European markets.

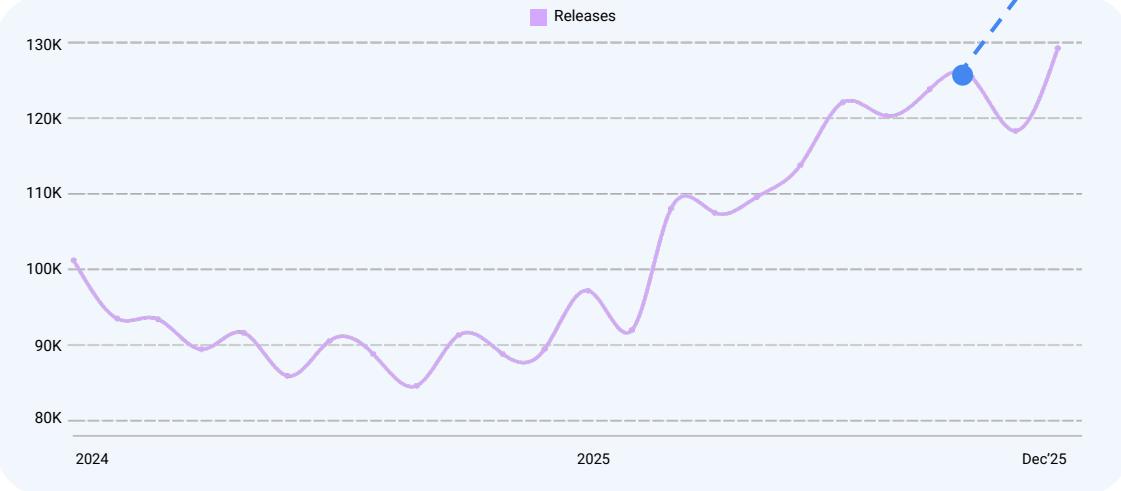
# The number of releases is growing rapidly

The mobile market continues to become increasingly saturated with both games and apps. In 2025, there were 25% more releases than in 2024.

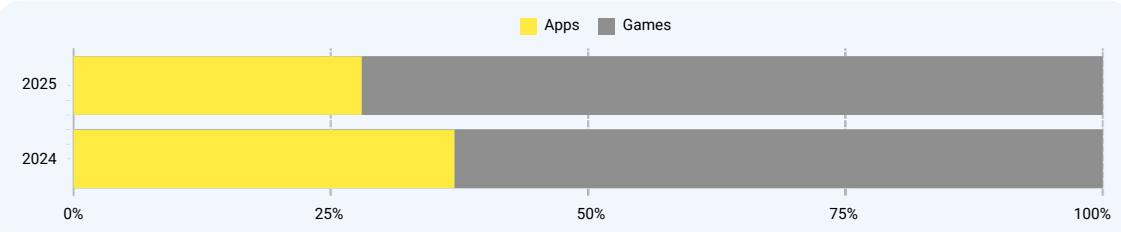
The share of games grew noticeably, rising from 63% in 2024 to 72% in 2025.

Overall, more than 1.4M releases were launched in 2025 across Google Play and the App Store. However, only a fraction of them, around 10%, actually draws user attention. Many releases receive just a handful of installs—or none at all.

Monthly trend for the total app releases (2024–2025)



Releases split between apps and games (2024–2025)



# Apps overtake games in revenue

In September 2025, for the first time in mobile market's history, apps earned more than games: the former generated \$4.8B, while the latter only brought in \$4.5B.

This shift was largely driven by the steady growth of the apps segment, both in developed regions with high LTV and in emerging markets.

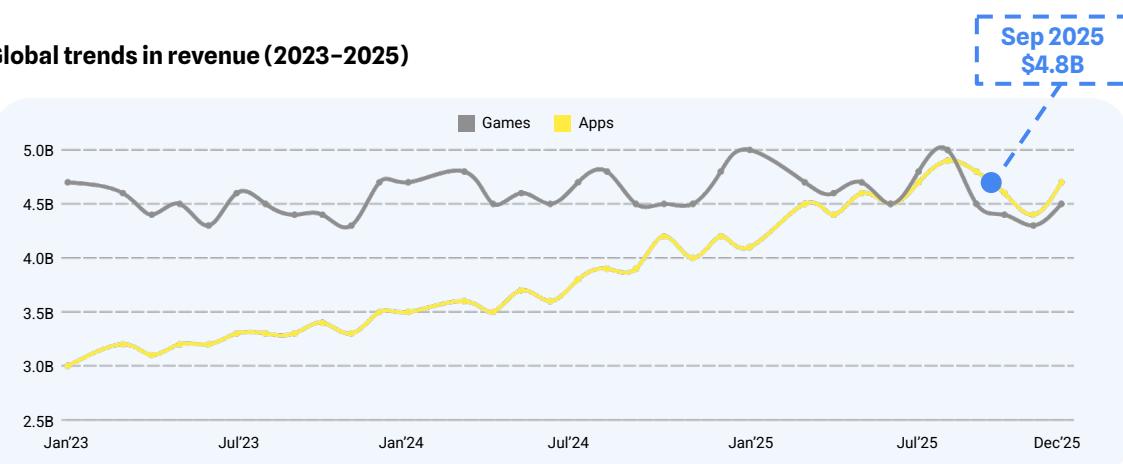
The most significant contributors to absolute revenue growth among the apps were: *ChatGPT* (+513% YoY), *TikTok* (+28%), *YouTube* (+36%), *Tinder* (+10%), and *HBO Max* (+17%).

At present, despite the slight market slowdown in September and October (just prior to the holiday season), the overall trend remains intact: apps continue to outperform games.

## Global trends in downloads (2023–2025)



## Global trends in revenue (2023–2025)



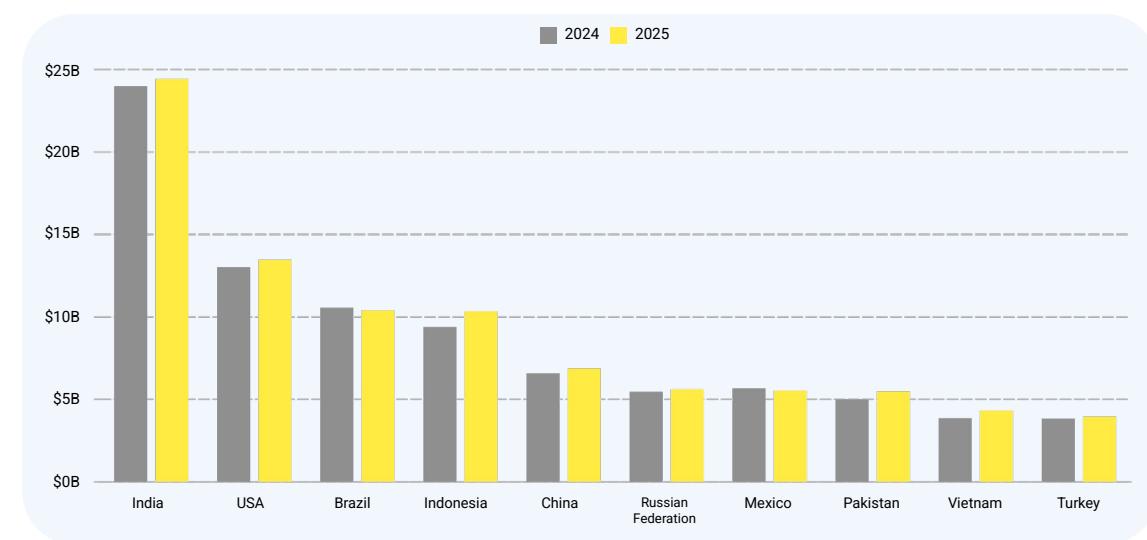
# Indonesia sees strong gains in downloads

The largest markets by downloads—India, the United States, and Brazil—remain stable year over year. Compared to 2024, there were no major changes: downloads grew by 3.5% in the US and by 1.9% in India, while Brazil saw a slight decline of 1.5%.

The key shift took place in Indonesia. As the country retained its No.4 position on the chart, its downloads increased by 10%.

A similar trend is observed in Pakistan and Vietnam, where downloads are growing rapidly, showing gains of around 10%.

## Global trends in downloads for the top 10 countries (2024–2025)



## Global YoY changes in downloads (2024–2025)



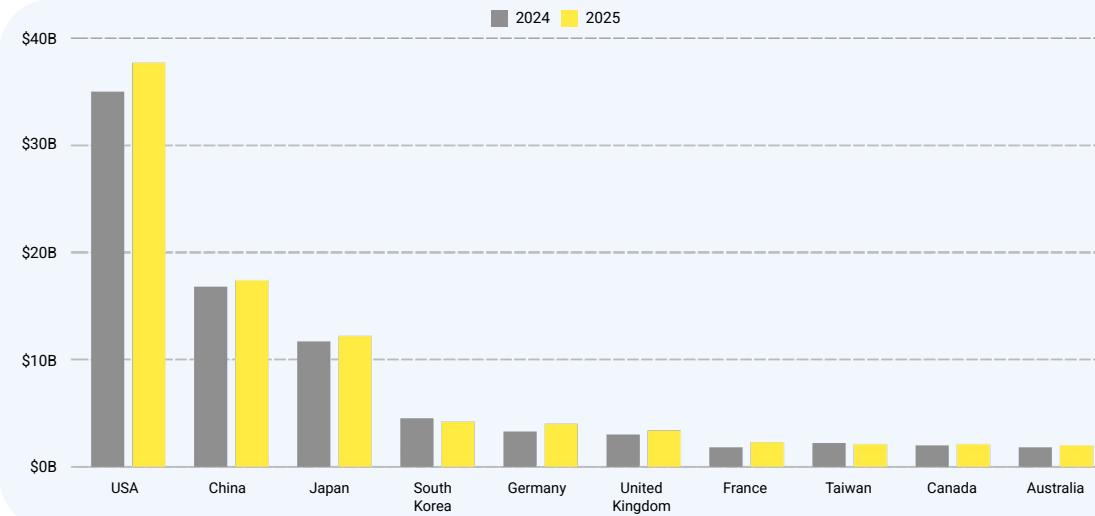
# Top countries keep growing, driven by apps

Many top-grossing countries, such as China, Japan, Germany, and the UK, are seeing strong revenue growth. This growth is mainly driven by apps, while games show little to no growth.

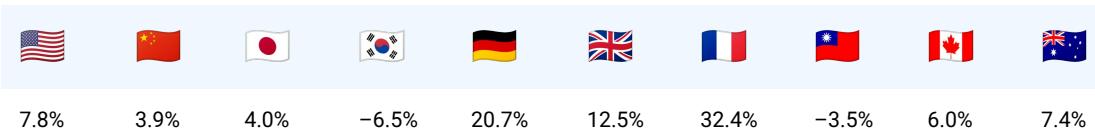
France also stands out, with revenue up 32% year over year.

Asia underwent a mixed trend: while China and Japan were growing strongly, South Korea and Taiwan took a slight dip.

## Global trends in revenue for the top 10 countries (2024–2025)



## Global YoY changes in revenue (2024–2025)



# LATAM is approaching saturation fast

Many Latin American countries, including Colombia, Ecuador, and Peru, are seeing a decline in downloads. Just a year ago, the LATAM region demonstrated solid growth and was considered one of the most promising regions for scaling user acquisition.

Current data suggests the market has reached saturation. Meanwhile, Western Europe and the UAE continue to show steady growth.

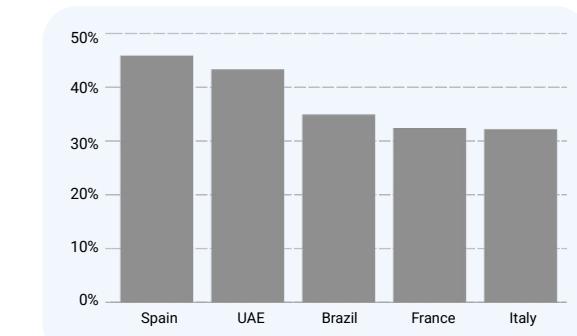
The strongest revenue increases come from Spain (46%) and the UAE (42%). France and Italy show more moderate but stable growth, which is typical for mature European markets.

## The fastest-growing countries

### Downloads

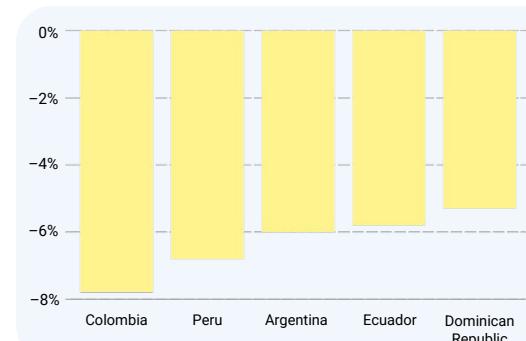


### Revenue

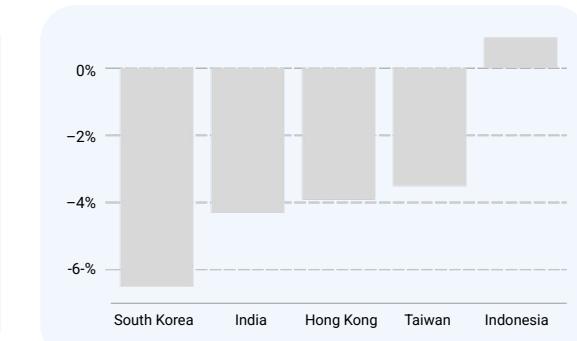


## The fastest-declining countries

### Downloads



### Revenue



# Expert Take: LATAM market saturation

**Roman Garbar**

Marketing Director



The downloads decline across LATAM markets can be attributed to major advertisers pursuing overly optimistic growth expectations, failing to achieve the anticipated eCPMs and IAP performance, and consequently reducing their budgets in 2025.

Similar patterns have previously been observed in other developing markets and are likely to recur.

# Global mobile market leaders, 2025

Top Downloads		Downloads	YoY	Top Grossing		Revenue	YoY			
1		ChatGPT	990M	+193%	 9	1		TikTok - Videos, Shop & LIVE	\$4.83B	+28%
2		TikTok - Videos, Shop & LIVE	770M	-22%	 1	2		Google One	\$2.67B	+27%
3		Instagram	574M	-33%	 1	3		ChatGPT	\$2.33B	+513%  30
4		Facebook	487M	-23%	 1	4		YouTube	\$2.09B	+36%
5		Google Gemini	474M	+381%	 61	5		Honor of Kings	\$1.68B	-3%  2
6		WhatsApp Messenger	465M	-29%	 3	6		Last War: Survival	\$1.57B	+40%  2
7		Temu: Shop Like a Billionaire	434M	-28%	 1	7		Roblox	\$1.46B	+25%  2
8		CapCut: Photo & Video Editor	398M	-38%	 4	8		Whiteout Survival	\$1.40B	+30%  5
9		Block Blast!	368M	+66%	 7	9		Royal Match	\$1.37B	-1%  3
10		Telegram	340M	-32%	 3	10		MONOPOLY GO!	\$1.36B	-5%  5

# Gaming Trends

# Key takeaways

## Gaming growth is losing momentum

Mobile games' revenue growth slowed to the mere +0.2% YoY versus last year's +3%, and the downloads growth is also down. This points to rising saturation and tougher competition.

## Casino and RPG are declining

Casino and RPG declined due to weaker downloads and reduced in-store monetization, while Strategy became the fastest-growing major genre.

## Top 10 markets are stagnating

Across downloads and revenue, the chart top 10 shows limited growth. Downloads are redistributing, while Western gains are offset by declines in key Asian markets.

## LATAM monetizes, not scales further

Latin America has reached saturation in downloads, but revenue continues to grow. This reflects improved monetization efficiency rather than audience expansion.

## Retention growth is becoming polarized

Top titles are largely flat (with minor mid-term uplifts), while Casual and Midcore gain somewhat overall along with shrinking long-term retention. Hypercasual shows strong growth.

## LiveOps intensity is rising

LiveOps activity increased significantly, with more frequent and diverse event formats. This indicates a stronger focus on continuous engagement across full user lifecycle.

## D2C adoption grows gradually

D2C revenue continues to grow, driven mainly by top-grossing titles. While still not universal, it signals a gradual shift toward alternative monetization channels.

## AI drives ad creatives

With 56% of top 100 grossing games using AI for ad production in 2025, AI is now firmly mainstream in creative advertising.

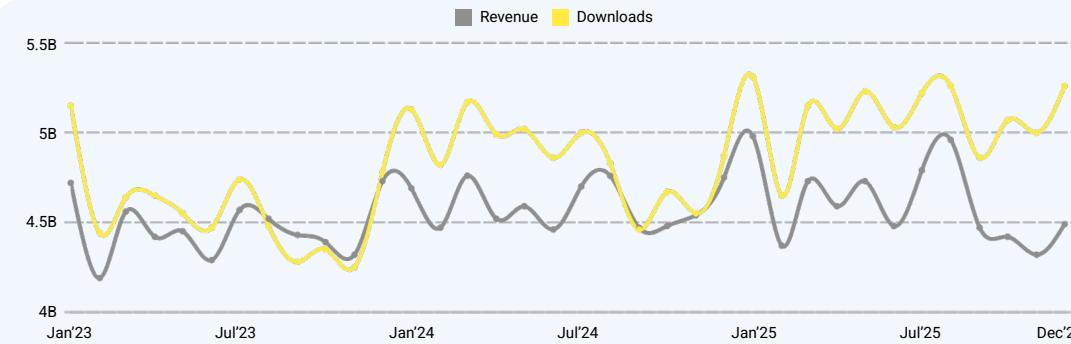
# Growth of the gaming market slows down

Compared to last year, the mobile gaming revenue increased by only +0.2%, unlike in 2024, when growth was more substantial at +3%.

Downloads have been growing more consistently, but the momentum is also weakening: while 2024 saw a growth of +6.6%, 2025 only brought about +4.6%.

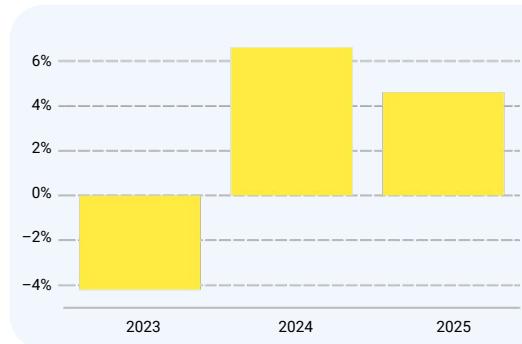
Overall, the gaming market is reaching its saturation: the growth pockets that manifested strongly in the previous years (for example, in Latin America) stopped seeing rapid downloads growth, and competition in existing markets has intensified to the point of limiting revenue growth across the entire mobile gaming market.

## Global trends in revenue and downloads (2023–2025)

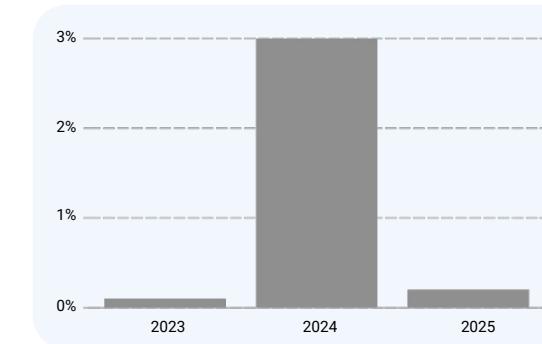


## Global YoY changes in revenue and downloads (2023–2025)

### Downloads



### Revenue



# Expert Take: Gaming revenue slowdown

**Ilya Eremeev**

Managing Partner



It may seem that the mobile market has entered a saturation phase, and to some extent, this is true: growth is now driven by the quality of game execution, while increasing the volume of LiveOps may have little impact on retention or even harm it if handled poorly. However, the market cannot be considered in decline: the drop in revenue from direct payments is being offset by growth in alternative revenue streams and D2C.

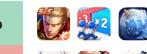
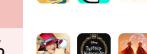
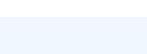
For new developers, entry is still possible, but only with strong differentiation, tight UA discipline, or a clear niche; generic games are unlikely to break through. Steam and PC are becoming increasingly attractive as a complementary or alternative path: they offer better discoverability for innovative titles and a more forgiving environment for small teams, especially when paired with a cross-platform or staged launch strategy.

# Casino and RPG are declining

Among the largest segments, Casino and RPG saw a significant decline.

While the drop in RPG is driven by lower downloads, the decline in Casino may be partly explained by a shift toward alternative revenue sources such as webshops or D2C. Either way, direct revenue from the App Store and Google Play shows a clear downtrend.

Strategy delivered strong growth in both revenue (+16%) and downloads (+15%): the highest increase among the largest segments.

Tag	Downloads 2024	Downloads 2025	%	Revenue 2024	Revenue 2025	%	Top Games
Strategy	2.2B	2.6B	15.3%	\$11.4B	\$13.3B	16.1%	
RPG	1.7B	1.6B	-9.1%	\$13.2B	\$11.0B	-16.6%	
Puzzle	10.3B	11.0B	6.5%	\$7.8B	\$8.7B	11.1%	
Casino	1.5B	1.7B	15.8%	\$7.5B	\$6.9B	-7.6%	
Simulation	10.7B	11.0B	2.5%	\$4.5B	\$4.8B	6.2%	
Shooter	2.8B	3.0B	7.8%	\$2.9B	\$3.3B	14.2%	
Sports Games	2.1B	2.1B	1.9%	\$1.8B	\$1.7B	-3.9%	
Action	7.2B	7.1B	-1.5%	\$1.7B	\$1.3B	-24.5%	
Tabletop	1.9B	2.2B	14.1%	\$869.1M	\$933.5M	7.4%	
Arcade	7.5B	7.8B	4.6%	\$670.6M	\$753.5M	12.4%	
Geolocation Games	57.3M	54.4M	-5.0%	\$835.1M	\$738.2M	-11.6%	
Adventure	958.5M	1.0B	6.9%	\$742.2M	\$719.2M	-3.1%	
Kids	4.7B	5.1B	7.1%	\$497.6M	\$552.6M	11.1%	
Racing	3.5B	3.3B	-4.3%	\$407.7M	\$361.0M	-11.4%	
Party Games	874.2M	943.5M	7.9%	\$325.2M	\$272.7M	-16.2%	
Game Collection	399.8M	659.6M	65.0%	\$36.1M	\$46.8M	29.6%	

Study the growing markets in detail with our Market Segment Comparison tool!

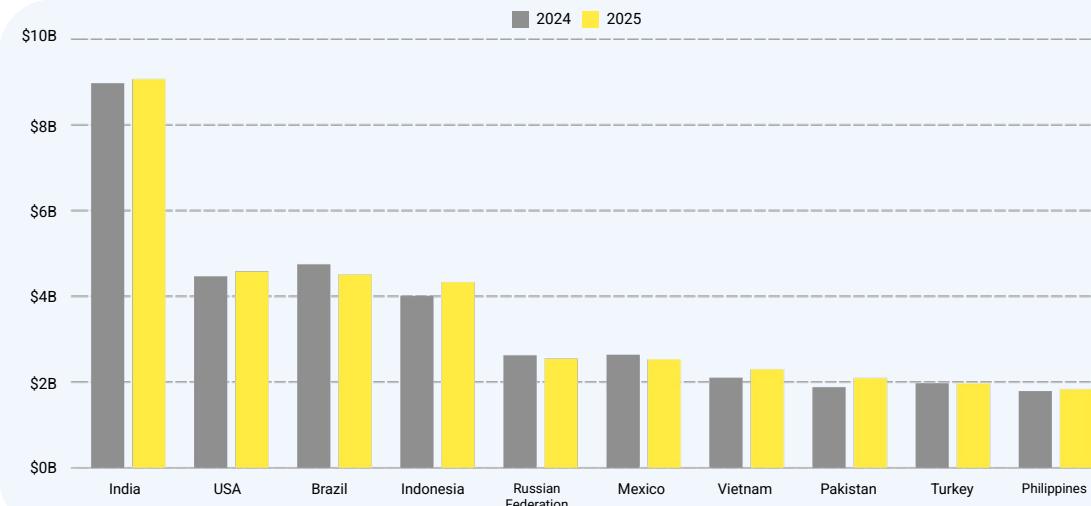
[Click here to learn more](#)

# Downloads redistributed in the top 10 markets

The top 10 countries with the highest downloads show almost no growth in their total shared volume. Instead, downloads are being redistributed within the group. Thus, while Brazil's downloads declined by 5%, growth of a similar magnitude was observed in Indonesia (+8%).

Despite overall volatility, downloads in the United States and India increased slightly—by 2.6% and 1.1% respectively, confirming that these markets remain stable.

## Trends in downloads for the top 10 countries (2024–2025)



## YoY changes in downloads for the top 10 countries (2024–2025)

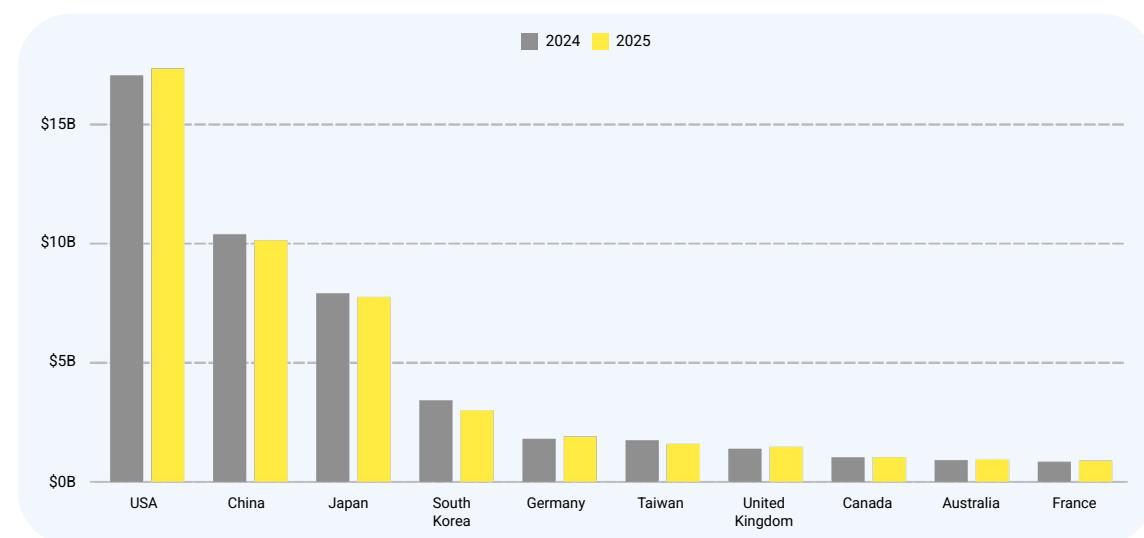


# Top 10 markets by revenue are stagnating

The top 10 revenue-earners are stagnating overall, with moderate growth in several Western countries and declines across key Asian monetization markets (China and Japan down around 2%, and South Korea down 12%).

Mature Western markets show steady, albeit moderate, growth. While Asian markets are seeing a slight decline in revenue, Western markets, such as the United Kingdom, France, and Germany, are growing and remain a reliable revenue backbone.

## Trends in revenue for the top 10 countries (2024–2025)



## YoY changes in revenue for the top 10 countries (2024–2025)



# LATAM grows in revenue, yet not in downloads

After a strong downloads growth in previous years, Latin America is now facing market saturation: downloads growth has largely stalled across most countries, while revenue is rising rapidly.

Against the broader slowdown in gaming revenue growth, fast-developing markets such as the UAE are showing positive revenue momentum.

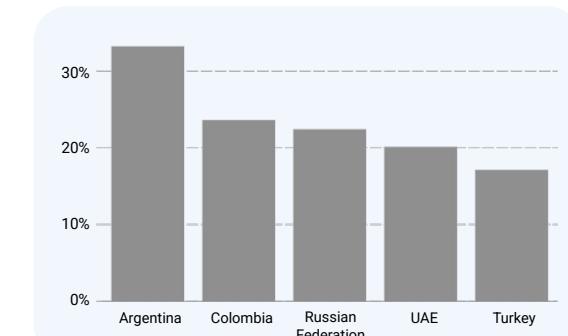
Asia remains volatile. South Korea, Taiwan, and Hong Kong show a clear negative trend, signaling market saturation.

## The fastest-growing countries

### Downloads

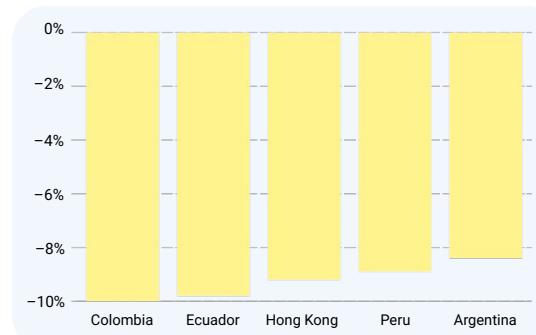


### Revenue

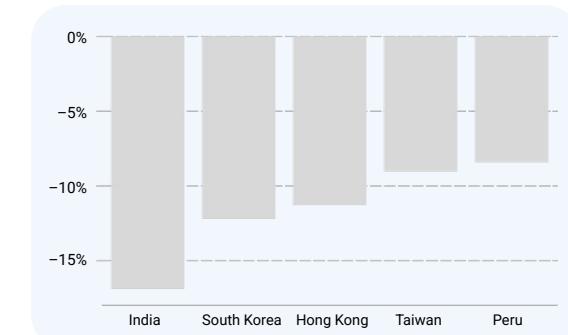


## The fastest-declining countries

### Downloads



### Revenue



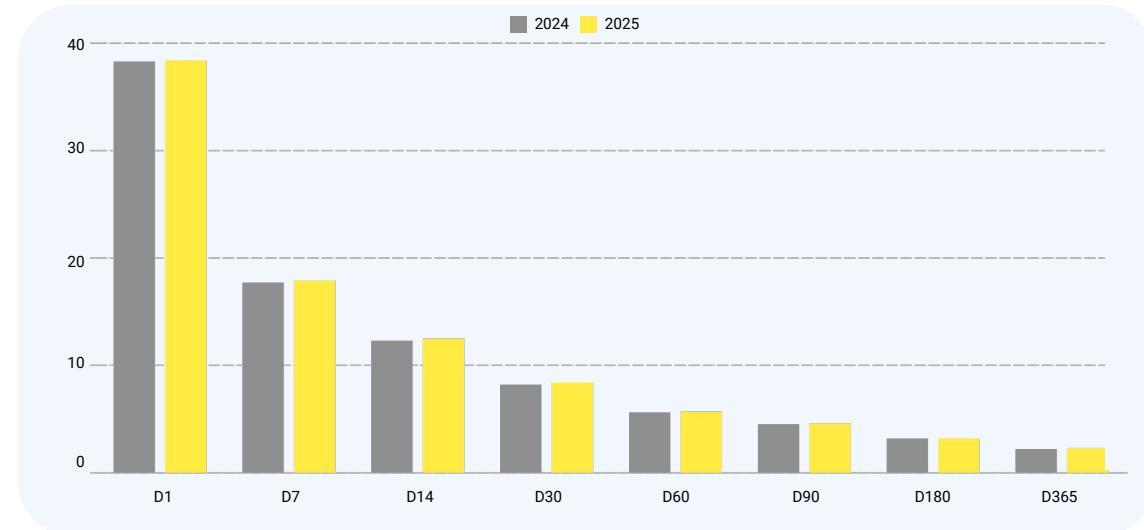
# Retention growth is becoming polarized

Against the backdrop of the slowing revenue and downloads growth in the games segment, retention is displaying a curious trend of its own.

Compared to the previous year, retention in top titles in 2025 remained largely unchanged, with only a slight increase of around 2% in mid-term retention.

It is important to note that retention trends vary across different segments: some top Casual and Midcore games continue improving, while their long-term retention overall seems to be on a downturn; at the same time, Hypercasual games show strong retention growth.

Global trends in retention for the top 200 grossing games (2024–2025)



Global YoY changes in retention for the top 200 grossing games (2024–2025)



# LiveOps event density in games is increasing

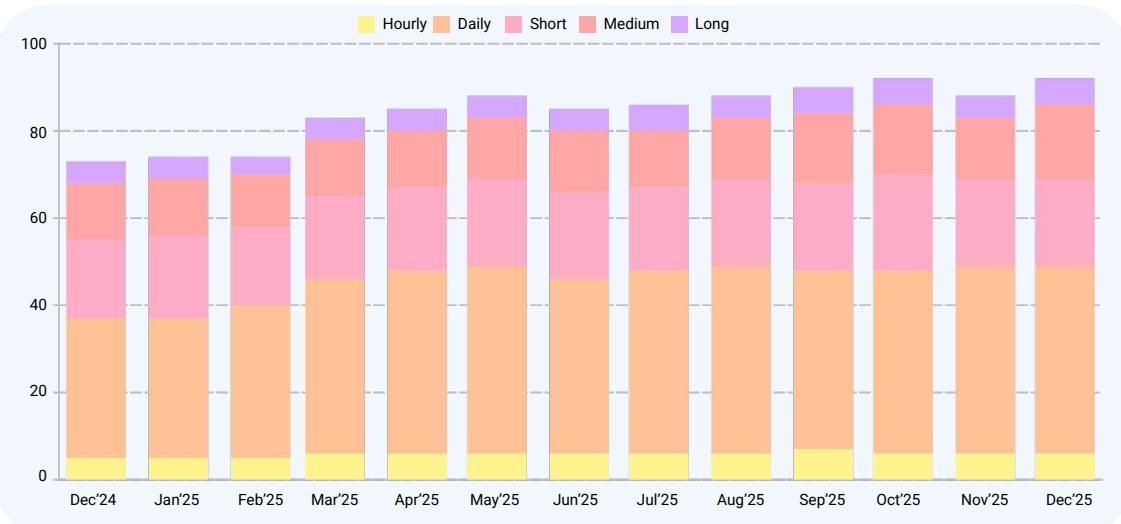
Rising competition in mobile games requires developers to engage users more actively, which is driving growth in LiveOps activity. Compared to December 2024, the average monthly number of LiveOps events per game in December 2025 increased by 16%, from 73 to 85 events per title.

Growth is observed across all event duration types, but the most notable increases were in Hourly (+25%), Daily (+35%), and Medium-length events (+29%).

This distribution suggests the focus is on user engagement across the full lifecycle, not only on retaining players in the short term.

Learn more about LiveOps and monetization trends in our [LiveOps Report 2025](#)

## Trends in the average number of LiveOps events by length per game (2025)



## YoY changes in the average number of LiveOps events by length per game (2024–2025)



# Expert Take: The future of LiveOps

**Michael Khripin**



Product Owner

The 35% jump in daily events tells us something important. Studios have completely changed how they think about keeping players around. It's simple economics. Getting new players is expensive now. So instead, you squeeze more value from the ones you already have. Daily events work because they create habits. Players log in every day, they spend more, and they stick around longer.

Some games are now running 100 events per month. That's crazy. But it works. The problem is that everyone else sees it and thinks they need to do the same thing. Here's the catch, though. You need serious systems to pull this off. And you have to be careful. Too many events—and players burn out. They feel overwhelmed and leave.

The smart studios in 2026 won't be the ones spamming events. They'll be the ones who figure out the sweet spot. Give players enough to come back every day, but not so much that it feels like a job.

# D2C revenue is growing, albeit slowly

Compared to last year, D2C revenue in the US increased by around 26% and is still primarily used by top titles, while it likely remains unprofitable for smaller projects.

The strongest growth among the top 100 grossing apps was recorded at 38%.

Against the backdrop of revenue declines in some segments (for example, Casino), this trend may be an important signal of the large apps' gradual shift toward alternative payment systems.

## Trends in D2C revenue, USA (2024–2025)



**Top 100 YoY growth\*:**  
**38%**

**All YoY growth\*:**  
**26%**

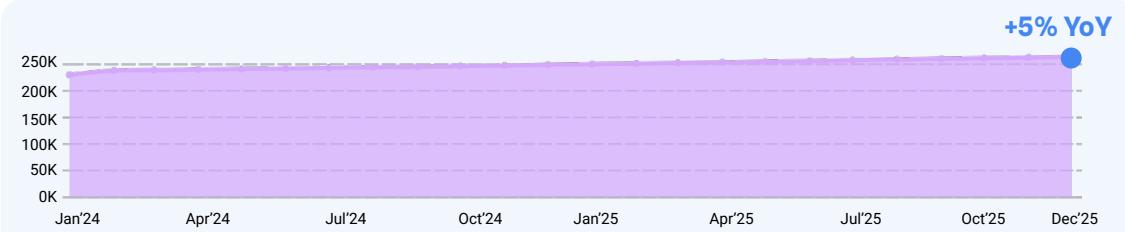
# YooKassa leads growth in payment SDKs

On average, leading payment SDKs showed global growth of 10%-40%.

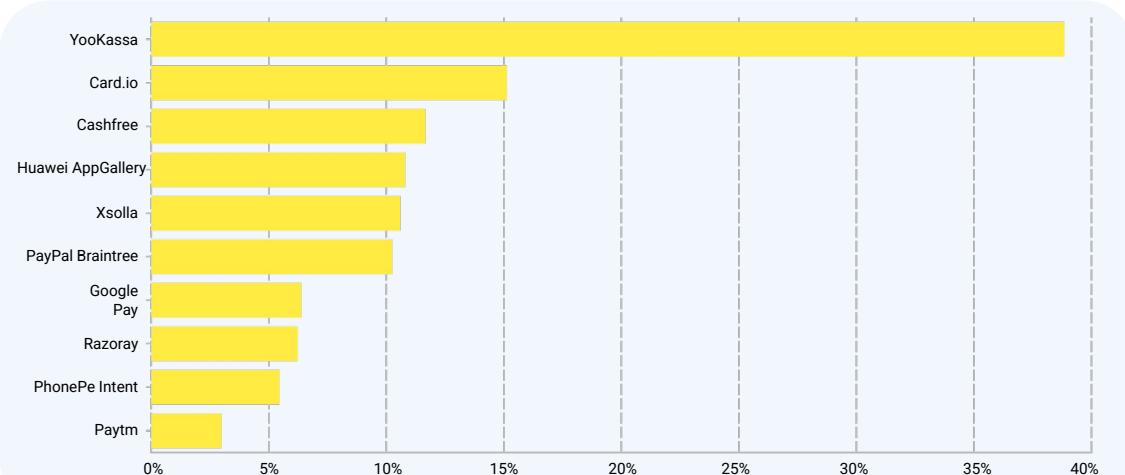
YooKassa recorded the strongest growth at around 39%. As a primarily Russia-focused payment service, it has become a key alternative after Visa and Mastercard's exit, enabling both apps and games to monetize Russian audiences in both domestic and foreign markets.

Despite the strong growth shown by specific payment SDKs, the overall number of apps using them is growing slowly, up only 5% year over year.

## Trends in payment SDK installs (2024-2025)



## Trends in the fastest-growing payment SDKs (2024-2025)



Explore competitor monetization with AppMagic and its [Direct-to-Consumer \(D2C\) Revenue metric](#)

# Expert Take: D2C in 2026

**Gil Tov-Ly**

CMO



Alternative payment systems will continue to grow in 2026, but the winners won't be those treating DTC as a side experiment.

Our data shows DTC has crossed an inflection point: when publishers adopt a shared DTC architecture—pairing app-to-web Payment Links with web stores run like LiveOps products—DTC becomes scalable, repeatable, and materially profitable not just for top titles.

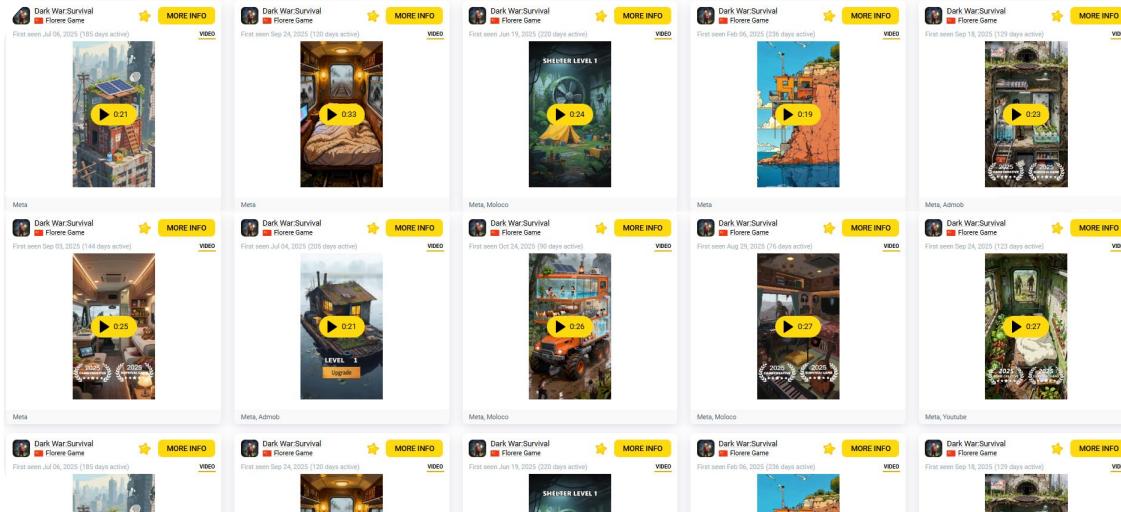
For all mobile games publishers, the question isn't whether to build DTC, but whether they can afford not to, as proven infrastructure lowers the barrier and the performance gap between adopters and laggards keeps widening.

# The rise of AI-driven ad creatives

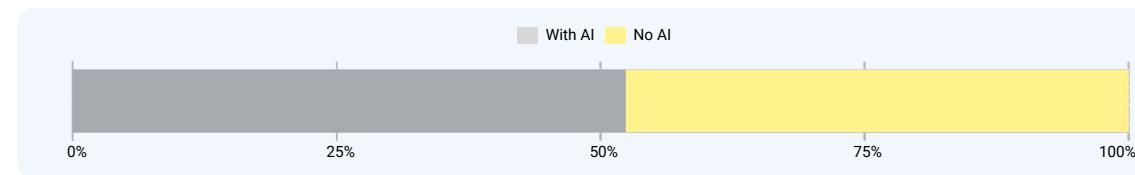
In 2025, the rapid advancement of AI had a truly significant impact on creative advertising.

A clear industry trend has emerged toward broader adoption of AI in creative production, ranging from AI-assisted workflows to fully AI-generated ad creatives.

Among the top 100 grossing mobile games, 56% were observed to have clearly used AI in the design and production of their advertising assets.



Use of AI in ad creatives: top 100 grossing mobile games, 2025



Discover the ad strategies behind the top-grossing games with our Ad Intelligence tool!

[Click here to learn more](#)

# Expert Take: The future of AI in creatives

**Olivia Barnett**

COO

**CRAFTSMAN+**

2025 proved AI is not just about speed; it drives winners. But will 2026 result in an inflection point?

As AI becomes the industry baseline, we must guard against creative monotony and visual fatigue that may have adverse impacts on performance.

The winners will find the perfect balance, leveraging human mutators to inject fresh, mold-breaking concepts, while leveraging AI as the engine to iterate and optimize at scale.

# Global game market leaders, 2025

Top Downloads		Downloads	YoY	Top Grossing		Revenue	YoY					
1		Block Blast!	368M	+66%		1		Honor of Kings	\$1.68B	-3%		
2		Roblox	295M	+37%		2		Last War: Survival	\$1.57B	+40%		2
3		Free Fire MAX	287M	-2%		3		Roblox	\$1.46B	+30%		2
4		Subway Surfers	191M	+1%		4		Whiteout Survival	\$1.40B	+50%		4
5		Pizza Ready!	166M	-7%		5		Royal Match	\$1.37B	-1%		2
6		Ludo King®	151M	-10%		6		MONOPOLY GO!	\$1.36B	-5%		4
7		Vita Mahjong	126M	+179%		7		PUBG MOBILE	\$1.12B	+2%		1
8		My Talking Tom 2: Pet Game	122M	-1%		8		Candy Crush Saga	\$1.01B	+3%		1
9		Hole.io	121M	+48%		9		Pokémon TCG Pocket	\$677M	+141%		16
10		PUBG MOBILE	116M	+3%		10		Coin Master	\$651M	-7%		

# Trends in Casual games

Casual games are easy to play, with simple rules, short play sessions, and minimal complexity, making them accessible and enjoyable for a wide audience.



Royal Match



Coin Master



Gossip Harbor®

# Key takeaways

## Audience is growing, revenue is stalling

Downloads growth accelerated from +6.4% (2024) to +8.0% (2025), but IAP revenue plateaued at around \$21B. Audience growth is not converting into revenue fast enough.

## Revenue is declining in top genres

Two of the three largest genres, Casino and Simulation, were set back: Puzzle was the only one to grow (+7.6%). Downloads growth alone no longer reliably drives revenue.

## Long-term retention is declining

Short-term retention is relatively stable, but mid- and long-term retention is falling. The decline speeds up from D14–D30 and peaks by D365 (roughly down from 8% to 13% YoY).

## Match-3 is in the lead, but stalling

Match-3 revenue is essentially flat at ~\$4.8B, indicating a mature, saturated segment. Growth is shifting to emerging formats, with Sort Puzzle up +116% YoY.

## Merge is the key driver of Puzzle's growth

Merge is the strongest growth engine for Puzzles, taking its revenue share from 14% in 2024 to 20% in 2025. It is pulling earnings away from Match-3, Match-2 Blast, and Match 3D.

## Merge growth, higher concentration

Despite rapid growth, Merge revenue is highly concentrated: ~80% comes from the top 10 titles. *Gossip Harbor* alone generated \$550M in 2025, or 33% of the segment's total revenue.

## Merge monetizes primarily via LiveOps

Unlike many Puzzle formats dominated by store offers, top Merge games monetize mainly through LiveOps, with recurring specials priced between \$1 and \$25.

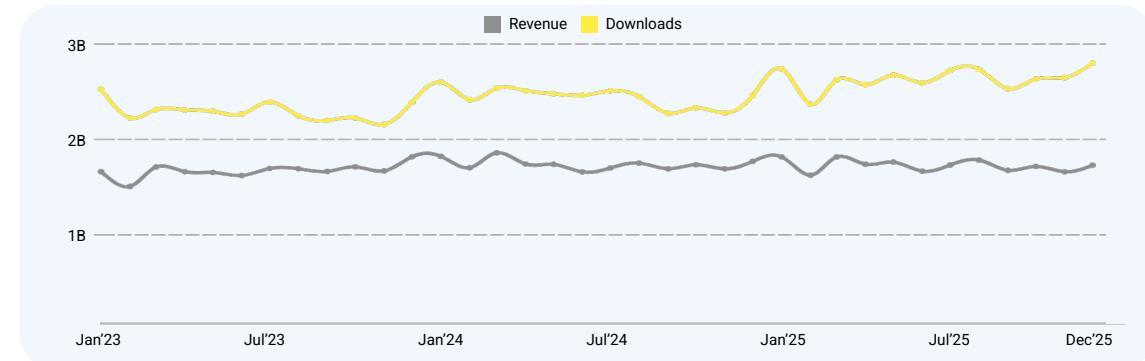
# Audience grows, revenue stalls

Downloads growth is accelerating: from +6.4% in 2024 to +8.0% in 2025.

IAP revenue has plateaued. Unlike downloads, revenue growth has been slowing year over year, and the segment's absolute revenue is effectively flat at around \$21B.

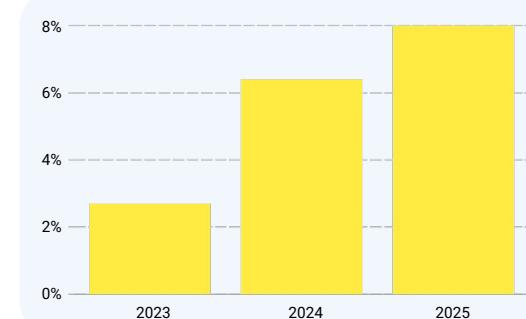
Increasing player numbers are not translating into revenue growth. Despite the expanding reach, the market is not monetizing newly acquired users fast enough.

## Global trends in revenue and downloads (2023–2025)

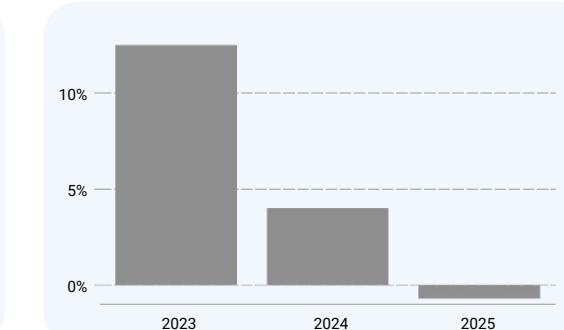


## Global YoY changes in revenue and downloads (2023–2025)

### Downloads



### Revenue



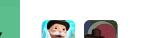
# Two out of three top genres are declining

Puzzle was the only major genre to grow its revenue (+7.6%), while Casino and Simulation figures declined.

Downloads growth does not guarantee revenue growth. Casino and Simulation's earnings shrunk despite their solid gains in downloads (+15% and +5%, respectively).

Strategy, Game Collection, and Geolocation Games showed strong growth in both downloads and revenue, mostly driven by a single title in each genre and amplified by the low-base effect.

Casual-core genres (e.g., Puzzle and Kids) remain the healthiest, with stable growth in both downloads and revenue.

Tag	Downloads 2024	Downloads 2025	%	Revenue 2024	Revenue 2025	%	Top Games
Puzzle	7.0B	7.7B	9.9%	\$7.6B	\$8.2B	7.6%	
Casino	1.5B	1.7B	15.7%	\$7.5B	\$6.9B	-7.6%	
Simulation	4.7B	4.9B	5.3%	\$2.0B	\$1.9B	-4.8%	
Tabletop	1.9B	2.2B	14.1%	\$870.4M	\$933.0M	7.2%	
Kids	4.7B	5.1B	7.1%	\$498.3M	\$553.7M	11.1%	
Adventure	767.9M	831.0M	8.2%	\$574.5M	\$542.3M	-5.6%	
Arcade	1.5B	1.7B	13.6%	\$458.8M	\$457.8M	-0.2%	
RPG	276.5M	251.2M	-9.2%	\$522.6M	\$424.1M	-18.8%	
Party Games	849.5M	917.8M	8.0%	\$325.0M	\$272.5M	-16.2%	
Sports Games	867.2M	845.8M	-2.5%	\$282.1M	\$257.5M	-8.7%	
Strategy	131.7M	207.8M	57.8%	\$70.1M	\$103.9M	48.2%	
Action	3.1B	3.3B	5.6%	\$86.1M	\$81.3M	-5.5%	
Racing	1.9B	1.9B	2.5%	\$50.7M	\$55.0M	8.6%	
Shooter	126.8M	94.3M	-25.7%	\$3.9M	\$2.7M	-30.7%	
Game Collection	214K	754K	253.1%	\$21K	\$94K	355.8%	
Geolocation Games	96K	156K	62.2%	\$8K	\$34K	346.7%	

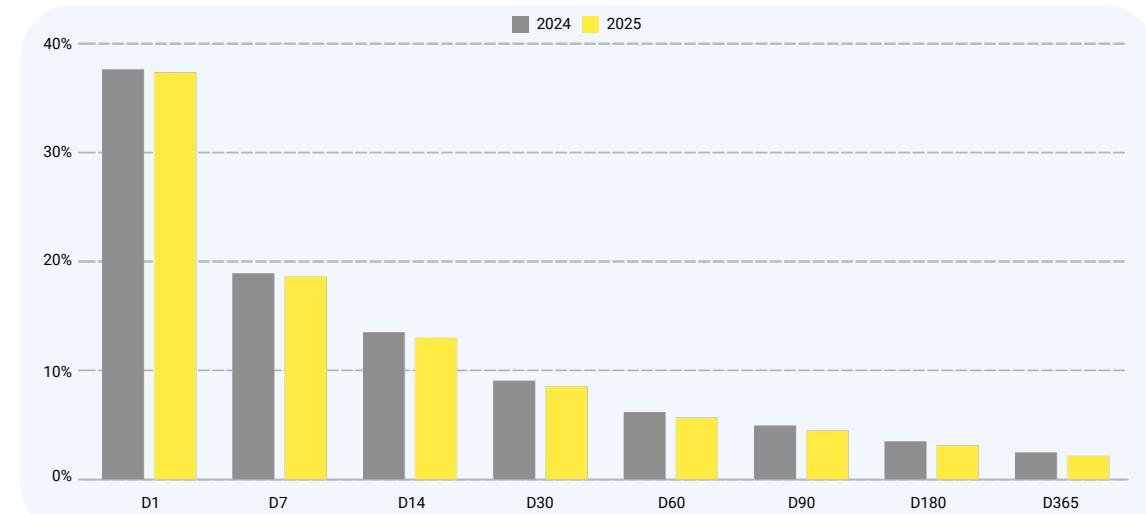
Study the growing markets in detail with our Market Segment Comparison tool! [Click here to learn more](#)

# Casual long-term retention is declining

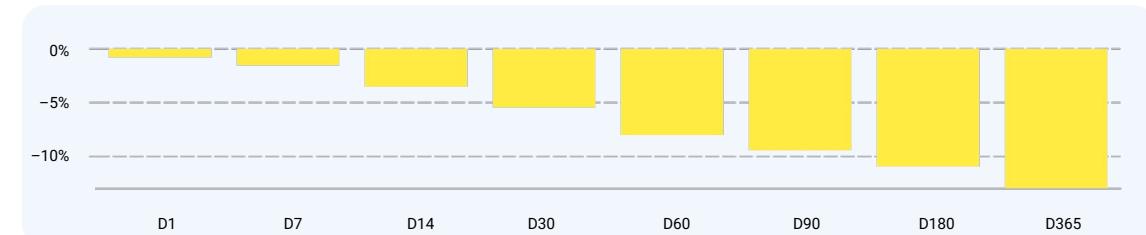
While short-term retention remains relatively stable, mid- and long-term retention has been on an expressed downtrend. The decline accelerates from D14–D30 (–3.5% to –5.4%) and reaches its peak by D365 (–8% to –13%).

In 2025, the main focus of LiveOps expansion was on short-term retention, driven by short hourly or daily events. Most likely, these measures were not sufficient to support long-term user retention in Midcore titles.

Global trends in retention for the top 200 grossing Casual games (2024–2025)



Global YoY changes in retention for the top 200 grossing Casual games (2024–2025)



Explore more LiveOps and monetization trends with our [LiveOps & Updates Calendar](#)

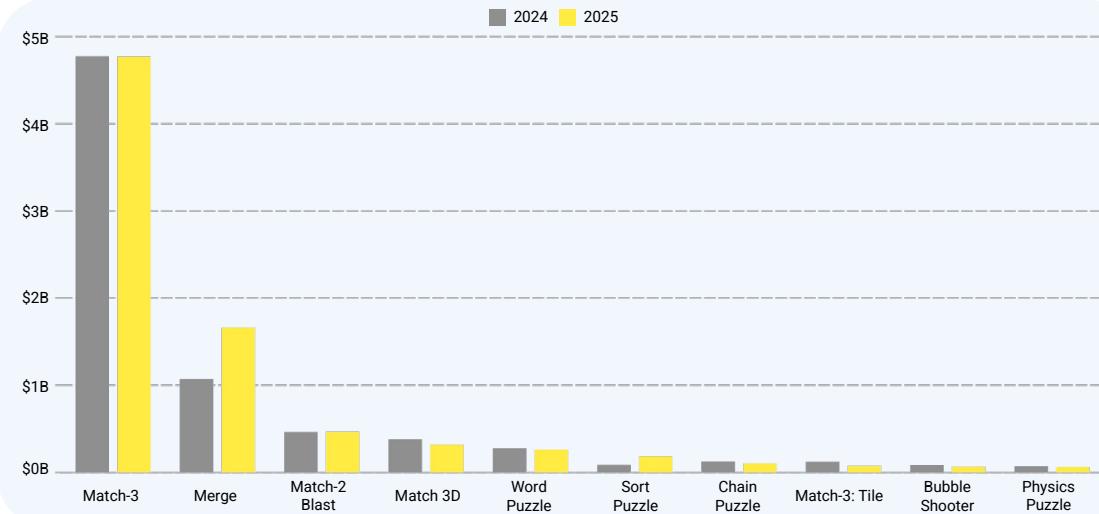
# Match-3 is in the lead, albeit stalling

The largest Puzzle subgenre, Match-3, has effectively plateaued: compared to last year, revenue shows only minor fluctuations within a mere 0.1%, remaining roughly flat overall at around \$4.8B.

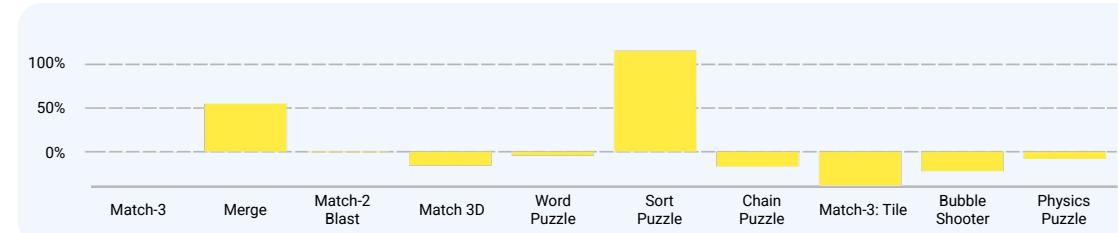
Certain subgenres, such as Sort Puzzle, show explosive growth—up +116% year over year.

Merge is actively pulling users and revenue from the classic Match-3, relying on deeper meta and stronger retention.

## Global trends in revenue for the top Puzzle subgenres (2024–2025)



## Global YoY changes in revenue for the top Puzzle subgenres (2024–2025)



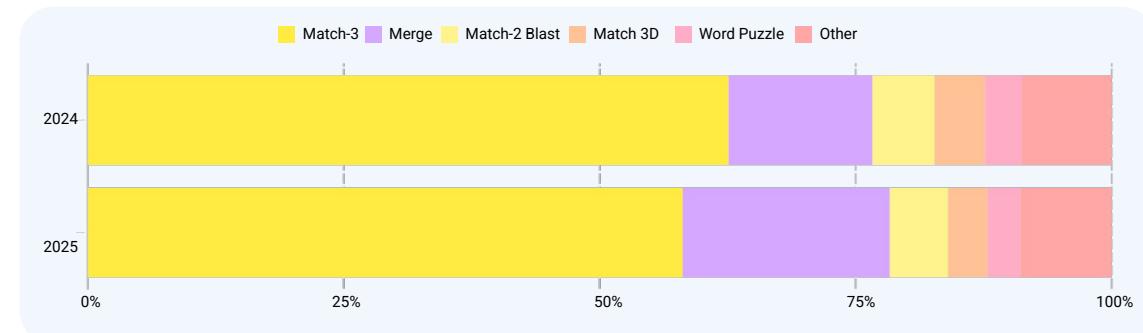
# Revenue growth is shifting to new formats

Merge delivered the strongest growth among major Puzzle subgenres, partially pulling audience from other large segments, such as Match-3, Match-2 Blast, and Match 3D. Its share of total market revenue increased from 14% in 2024 to 20% in 2025.

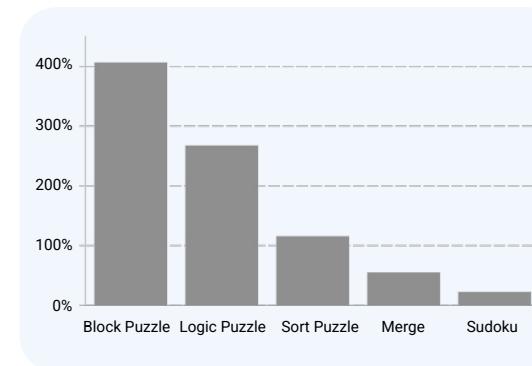
Despite explosive growth in Block Puzzle, Logic Puzzle, and Sort Puzzle, their revenue share remains relatively small.

At the same time, certain subgenres, such as Maze, Match-3: Tile, and Find the Difference, saw their revenues shrink, dropping up to 40%.

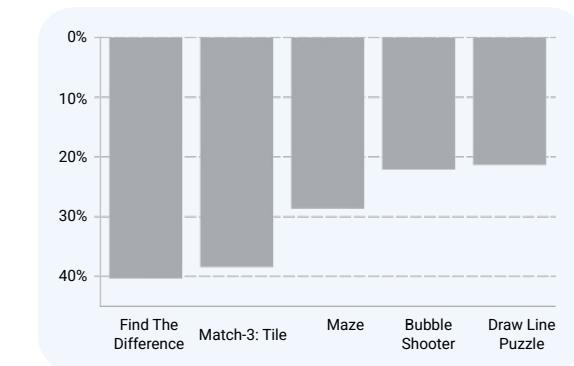
## Change in revenue share by genre (2024–2025)



## The fastest-growing subgenres



## The fastest-declining subgenres



# Merge is still growing as it gets more competitive

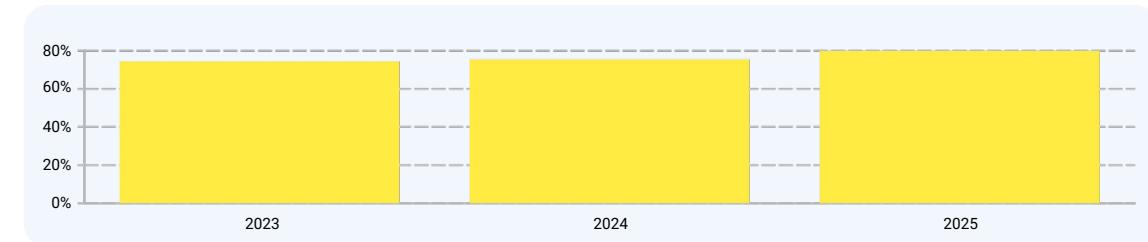
Despite strong YoY growth in the Merge segment, most of its revenue is highly concentrated among the top 10 titles. In 2025, the oligopoly index, defined as the top-10 share of the segment's total revenue, reached nearly 80%, while the rest of the market shared the remaining 20%.

In 2025, the leading Merge-2 title, [Gossip Harbor](#), generated \$550M, accounting for 33% of the genre's total revenue, and this share continues to grow.

## Global trends in revenue (2023–2025)



## Global changes in the oligopoly index (2023–2025)



# Revenue in Merge games is spread across all offer types

Unlike many Puzzle subgenres, where most revenue typically comes from store offers (hard currency and bundles), top Merge games generate revenue primarily from LiveOps-related offers. Their top 3 offers are often in the form of recurring special deals priced between \$1 and \$25.

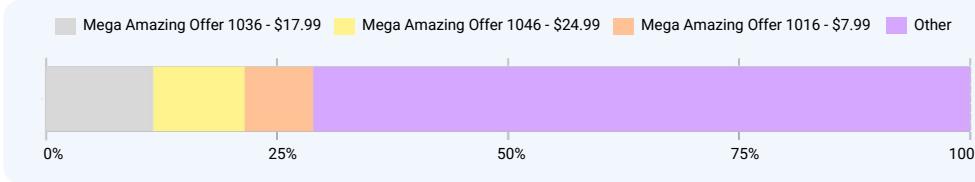
## Revenue distribution of the top-grossing offers



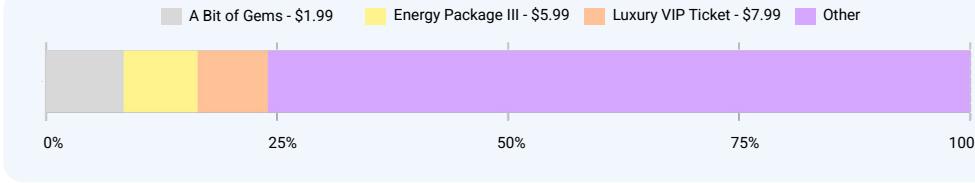
Gossip Harbor



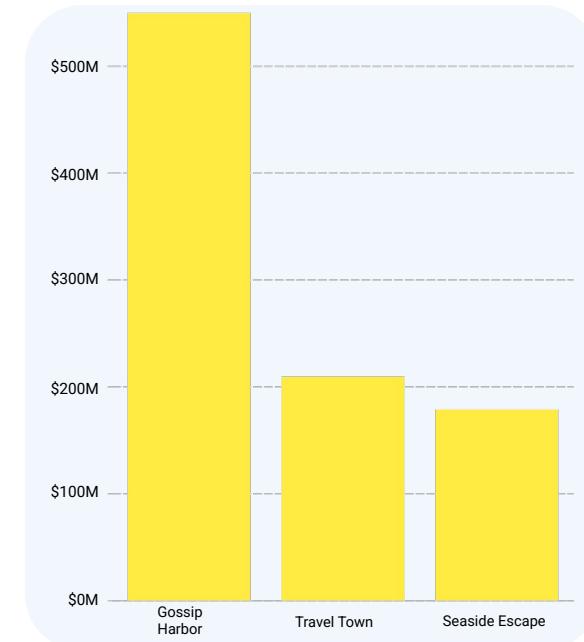
Travel Town



Seaside Escape



## Revenue of top-grossing games, 2025



# Trends in Midcore games

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.



Honor of Kings



Last War:Survival



Roblox

# Key takeaways

## Midcore users up, revenue flat

Downloads recovered after the 2023 drop and kept growing, but momentum slowed down. Revenue remains essentially unchanged, with the market hovering around \$33–\$34B.

## Post-2023 rebound is fading

After a strong 2024 recovery, 2025 growth continued at a slower pace. This suggests Midcore is moving from rebound to maturity.

## Strategy drives Midcore growth

In 2025, Strategy grew strongly in both downloads (+18.2%) and revenue (+15.9%), reinforcing its leadership. It remains the main growth engine within the Midcore segment.

## Shooter and Simulation are improving

Both genres delivered solid gains in downloads (+10% and +8%) and revenue (around +14% to +15%). This points to stronger monetization performance versus last year.

## RPG suffers the biggest decline

RPG saw the sharpest drop, with downloads down 9.0% and revenue down 16.5%. The genre is losing both audience and monetization momentum.

## Long-term retention is weakening

Weaker retention range in Midcore begins at D90 and peaks at D365 (-12%). Short-term retention remains relatively stable.

## 4X fuels Strategy expansion

4X is the primary growth engine within Strategy, supported by deep meta and long LTV. In 2025, it grew +31% in downloads and +21% in revenue YoY.

## 4X monetization is high-ticket

In top 4X titles, \$99 offers contribute around 30% of total revenue, typically via currency bundles or core packs. The next strongest tier is \$44–\$49, reinforcing a premium-heavy offer mix.

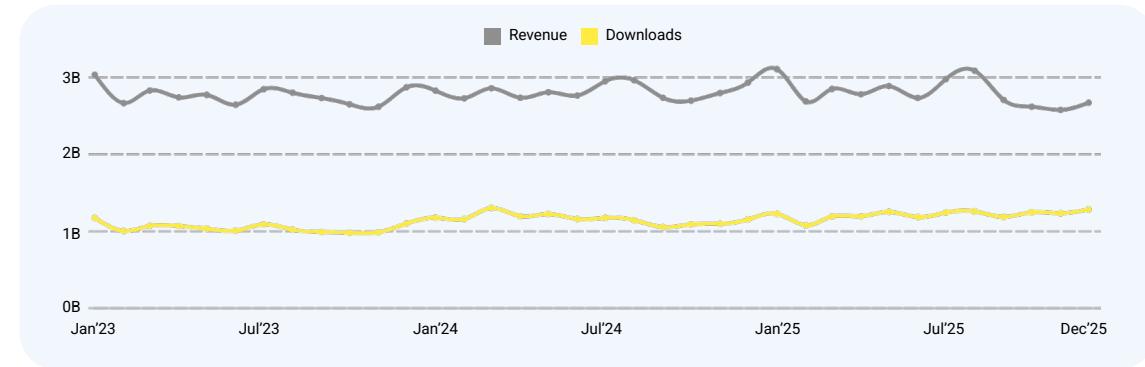
# Midcore gains users, revenue stalls

Midcore downloads recovered after the 2023 downturn. While the segment declined in 2023 (-6.7%), it rebounded nicely in 2024 (+11.2%). Growth has since continued, but at a slower pace.

Revenue has plateaued. After falling in 2023 (-6.3%), it picked back up somewhat in 2024, but in 2025, it showed no meaningful growth.

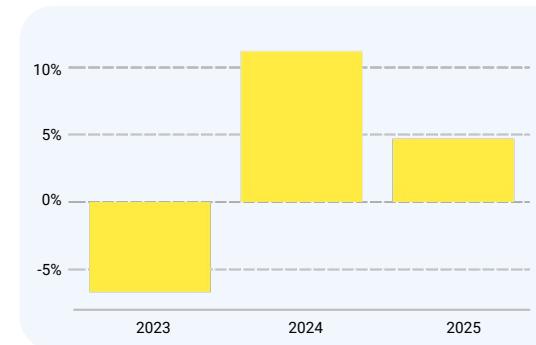
In absolute terms, the market is essentially flat at around \$33–34B.

## Global trends in revenue and downloads (2023–2025)

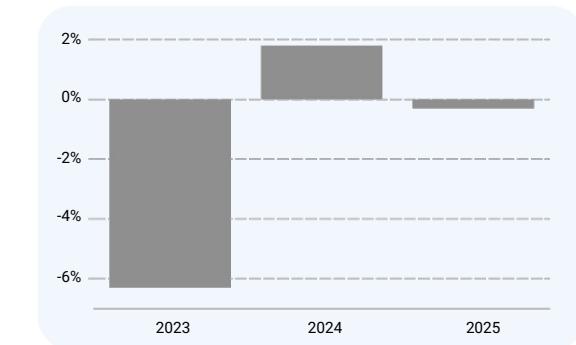


## Global YoY changes in revenue and downloads (2023–2025)

### Downloads



### Revenue



# Strategy is growing, RPG is declining

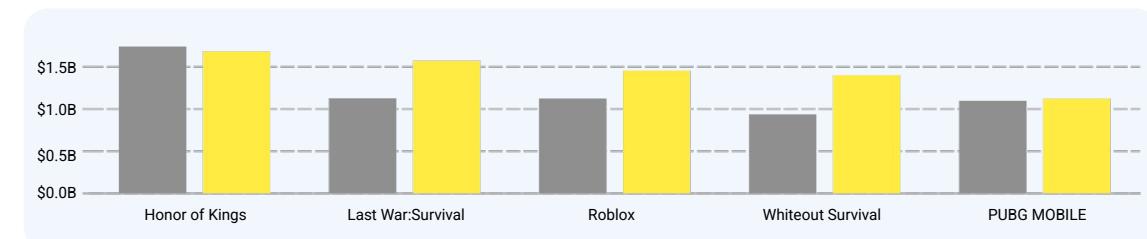
In 2025, the Strategy market grew strongly, with downloads up +18.2% and revenue up +15.9%. The genre is strengthening its leadership and remains the main growth driver within Midcore.

Growth is shifting toward the Strategy, Shooter, and Simulation genres. Shooter and Simulation delivered solid gains in both downloads (+8% to +10%) and revenue (around +14% to +15%), pointing to improved monetization.

RPG saw the sharpest decline, with downloads down 9.0% and revenue down 16.5%.

Tag	Downloads 2024	Downloads 2025	%	Revenue 2024	Revenue 2025	%	Top Games
Strategy	1.8B	2.1B	+18.2%	\$11B	\$13B	+15.9%	
RPG	1.4B	1.3B	-9.0%	\$13B	\$11B	-16.5%	
Shooter	2.2B	2.4B	+9.0%	\$3B	\$3B	+14.3%	
Simulation	4.0B	4.3B	+7.6%	\$3B	\$3B	+14.6%	
Sports Games	1.0B	1.1B	+5.7%	\$1B	\$1B	-2.9%	
Action	2.2B	2.2B	-1.4%	\$2B	\$1B	-25.8%	
Geolocation Games	57.2M	54.2M	-5.2%	\$835M	\$738M	-11.6%	
Racing	1.1B	956.8M	-10.1%	\$352M	\$301M	-14.4%	
Adventure	163.3M	176.0M	+7.8%	\$168M	\$177M	+5.3%	
Arcade	238K	324K	+36.1%	\$1K	\$67K	+6596.7%	

## Top 5 highest-grossing titles in 2025



# Midcore retention is declining

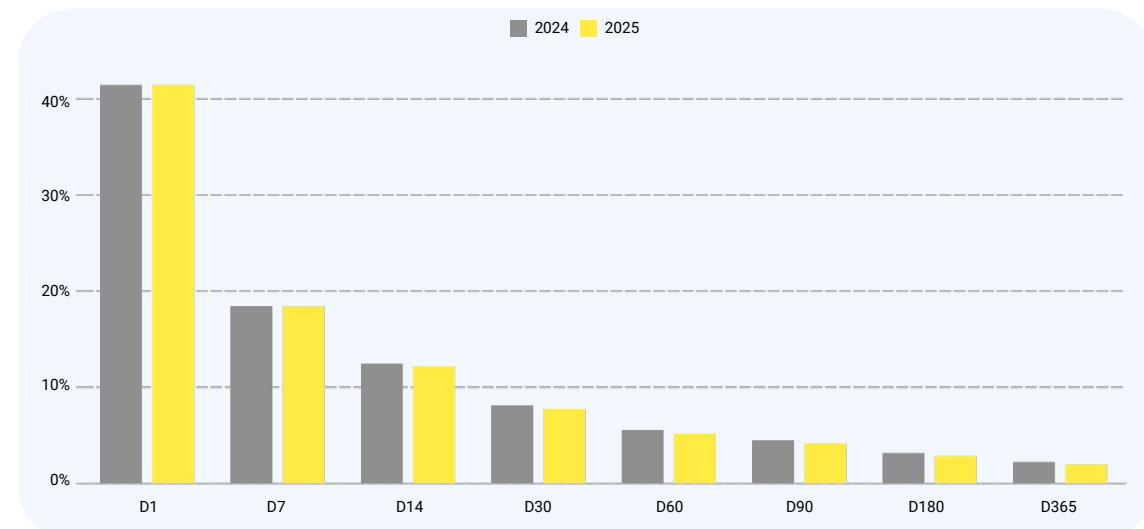
Similar to the Casual trend, Midcore shows a drop in long-term retention, with the steepest declines occurring from D90 to D365.

The largest drop is at D365, down 12%. Short-term retention remains relatively stable.

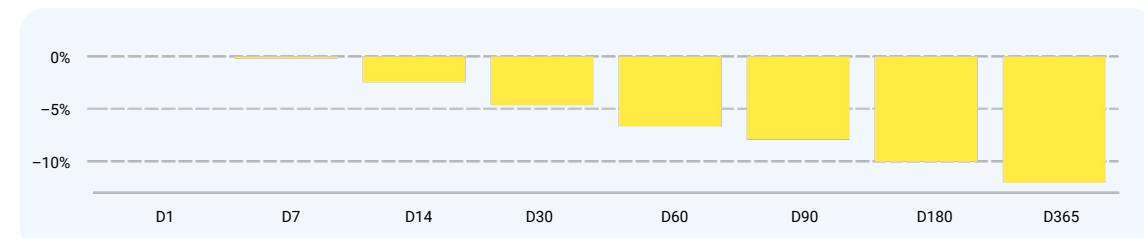
The decline in long-term retention was one of the reasons why, despite the downloads growth, Midcore titles still saw a drop in revenue compared to last year.

The current trend suggests that, even as the number of in-game events increases, it is becoming harder to retain users.

Global trends in retention for the top 200 grossing Midcore games (2024–2025)



Global YoY changes in retention for the top 200 grossing Midcore games (2024–2025)



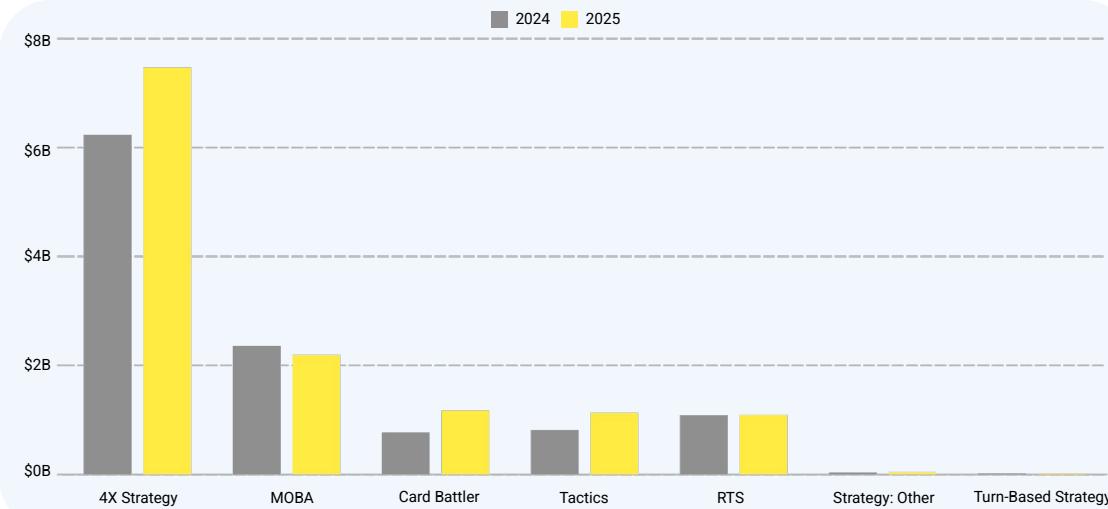
# 4X Strategy is the main market driver

4X continues to strengthen its dominance and remains the primary growth engine within Strategy, supported by deep meta and long LTV. In 2025, it grew +21% in revenue and +31% in downloads compared to the previous year.

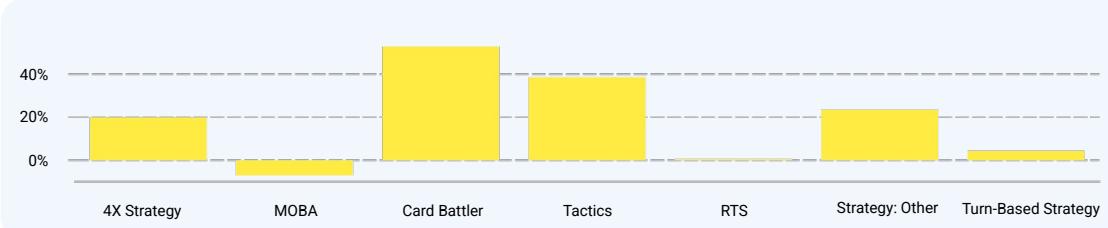
MOBA showed a negative revenue trend. The genre is retaining its audience, but faces pressure on ARPU and payer spend. Revenue declined by 8% in 2025.

Tactics is a 2025 breakout. One of the fastest-growing Strategy subgenres, its revenue went up +35% and downloads were up +41% in 2025.

## Global trends in revenue for the top Strategy subgenres (2024–2025)



## Global YoY changes in revenue for the top Strategy subgenres (2024–2025)



# Competition in 4X

## Strategy is intensifying

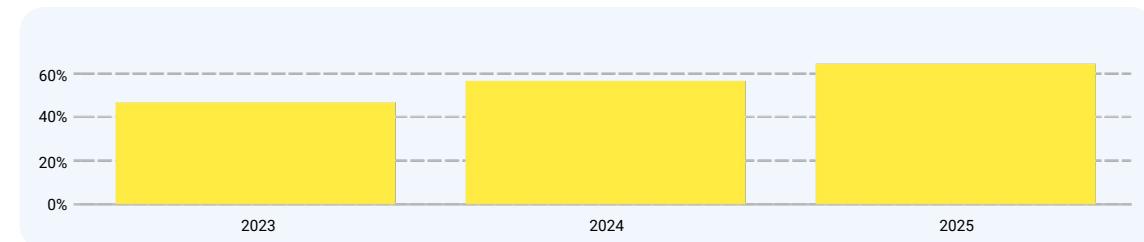
Despite strong YoY revenue growth, most of the gains are split between the top 10 titles, and this concentration continues to rise. The oligopoly index, defined as the top 10's share of the genre's total revenue, increased from 47% in 2023 to 64% in 2025.

At the same time, 2025 showed that category leaders can change. Newer titles such as *Last Z: Survival Shooter* (released in 2024) and *Kingshot* (released in 2025) have secured positions among the top performers.

### Global trends in revenue (2023–2025)



### Global changes in the oligopoly index (2023–2025)



# \$99 offers are the backbone of 4X Strategy revenue

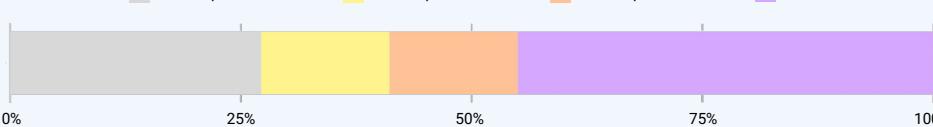
In top titles, \$99 offers (most often currency bundles or core packs) account for a significant share of the games' total revenue, coming in at around 30%. The next largest contributor are the offers priced at \$44–\$49.

## Revenue distribution of the top-grossing offers



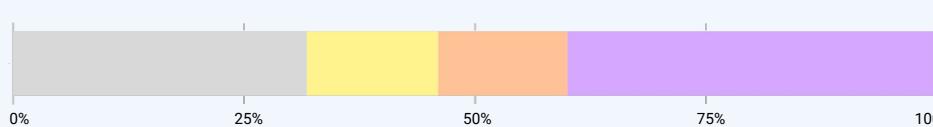
Last War:Survival

Normal pack 16 - \$99.99   Normal pack 14 - \$49.99   Normal pack 10 - \$19.99   Other



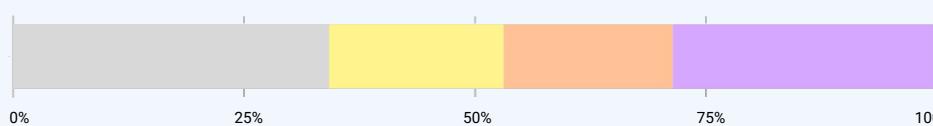
Whiteout Survival

Standard pack 16 - \$99.99   Standard pack 14 - \$49.99   Standard pack 5 - \$4.99   Other



Kingshot

Hot package 100 - \$99.99   Hot package 20 - \$19.99   Hot package 50 - \$49.99   Other



## Revenue of top-grossing apps, 2025



# Trends in Hypercasual games

Hypercasual games are simple, often built around a single core mechanic, and designed for short, repeatable sessions. They scale quickly through viral growth and monetize primarily via ads.



Screwdom



Pocket Champs



All in Hole

# Key takeaways

## 2025 is Hypercasual's turning point

Hypercasual revenue grew ~80% in 2025 and has increased 4–5 times over three years. This scale of growth signals a structural shift toward hybridization.

## Revenue grows, downloads stabilize

Downloads remain very high at 1.1–1.3B per month but are no longer expanding. In 2025, they declined slightly (–3.7% YoY), while revenue continued to surge.

## Revenue shifts to Puzzle, Arcade, and Simulation

Puzzle, Arcade, and Simulation now hold a growing share of Hypercasual revenue. Other classic subgenres are losing scale and relevance.

## Block, Physics, and Sort Puzzles surge

They are the fastest-growing subgenres, and their performance reflects a clear shift from pure Hypercasual toward hybrid mechanics.

## Monetization outpaces audience growth

In Block Puzzle and Physics Puzzle, revenue growth far exceeds downloads growth. This points to rising ARPU and longer player lifecycles.

## Retention improves across lifecycle

Retention is rising across all stages, with the strongest gains in mid- and long-term periods, supporting higher LTV and revenue resilience.

## Top offers drive most of the monetization

In top Hypercasual Puzzle games, the top 3 offers generate ~40% of revenue. Monetization is driven by fail offers and \$2–\$8 hard-currency bundles.

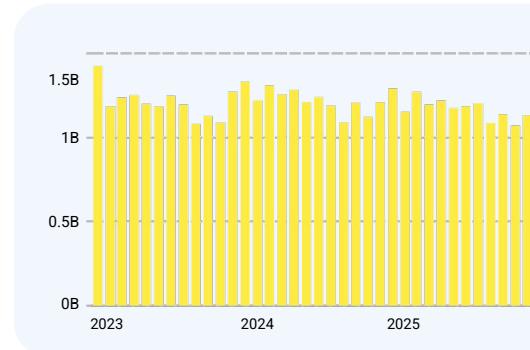
# 2025 is a turning point for Hypercasual

In 2025, Hypercasual revenue grew by about 80%, similar to 2024. Over the past three years, monthly revenue has increased 4–5 times roughly. This is atypical for the classic Hypercasual and suggests that the market is still shifting toward hybridization.

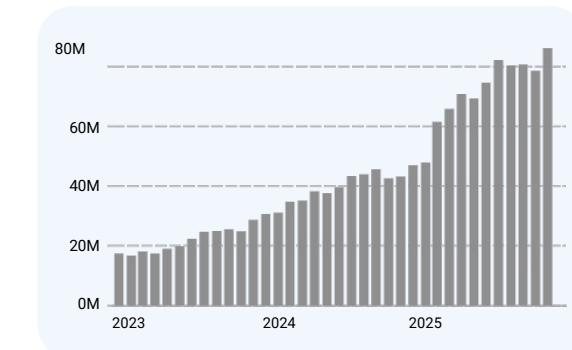
Downloads remain very high but are no longer growing exponentially. They stay relatively stable at 1.1–1.3B per month, and in 2025, they declined slightly (−3.7% YoY).

## Global trends in revenue and downloads (2023–2025)

Downloads

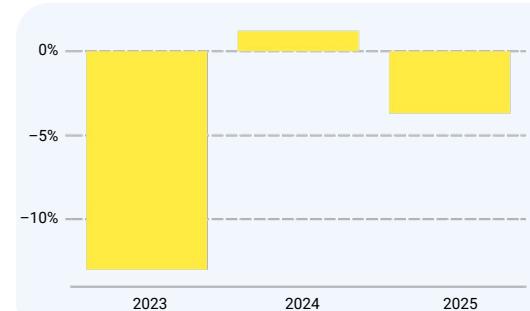


Revenue

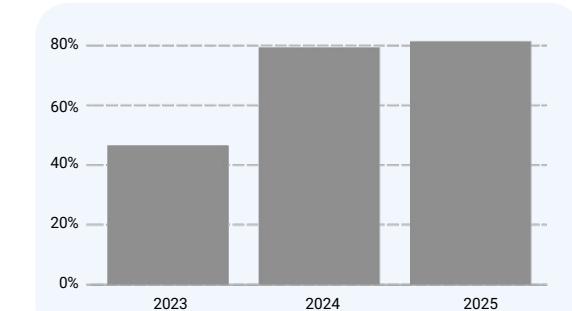


## Global YoY changes in revenue and downloads (2023–2025)

Downloads



Revenue



# Revenue shifts to Puzzle, Arcade, and Simulation

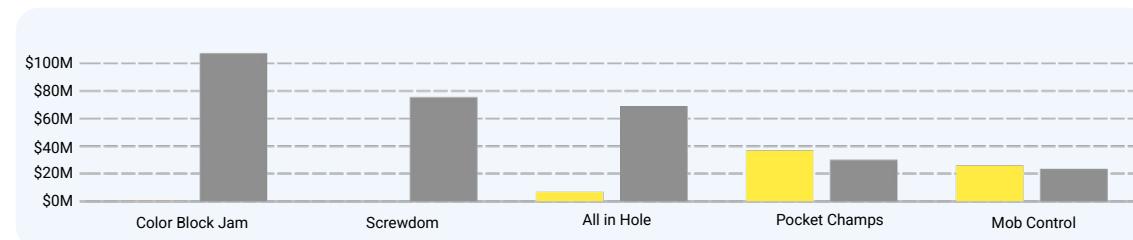
Revenue is increasingly concentrated in Puzzle, Arcade, and Simulation titles, while many classic subgenres are losing scale. The segment is rapidly shifting toward hybrid, longer-lifecycle formats.

Puzzle is the main monetization winner. While its downloads are nearly flat, revenue has almost doubled, reaching \$481M.

Classic formats are struggling. Action, Strategy, Racing, and Adventure saw sharp declines in downloads, ranging from 13% to 31%.

Tag	Downloads 2024	Downloads 2025	%	Revenue 2024	Revenue 2025	%	Top Games
Puzzle	3.3B	3.2B	-0.9%	\$195.2M	\$480.7M	146.2%	  
Arcade	6.0B	6.2B	2.1%	\$212.7M	\$296.0M	39.2%	  
Action	1.9B	1.6B	-13.1%	\$20.3M	\$20.5M	0.8%	  
Simulation	2.1B	1.8B	-13.0%	\$8.3M	\$18.3M	120.3%	  
Strategy	326.3M	266.8M	-18.2%	\$16.0M	\$16.3M	1.6%	  
Shooter	434.9M	465.7M	7.1%	\$5.4M	\$5.3M	-1.5%	  
Racing	463.6M	368.6M	-20.5%	\$4.1M	\$3.7M	-9.8%	  
Sports Games	134.9M	137.0M	1.5%	\$3.0M	\$2.9M	-4.6%	  
Adventure	27.6M	19.1M	-30.7%	\$111K	\$258K	131.4%	  
Party Games	25.2M	26.3M	4.4%	\$168K	\$142K	-15.2%	  
Tabletop	1.8M	1.3M	-26.0%	\$31K	\$13K	-57.7%	  

## Top 5 highest-grossing titles in 2025

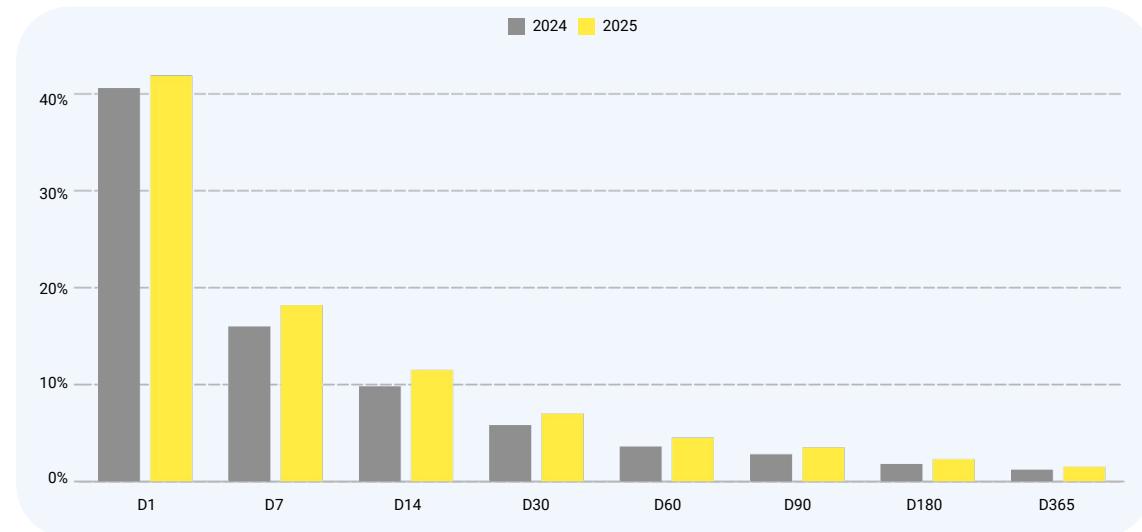


# Hypercasual is learning to retain players

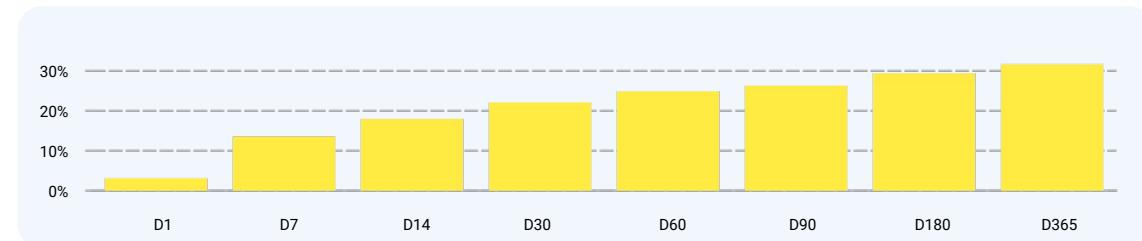
Retention is rising significantly across the entire lifecycle, from D1 (+3%) to D365 (+32%). Many subgenres are adapting to employ deeper mechanics and more sophisticated monetization models.

Retention gains are especially strong in mid- and long-term periods, making the niche more resilient in terms of LTV and helping explain the sharp revenue growth despite only modest downloads growth.

Global trends in retention for the top 200 grossing Hypercasual games (2024–2025)



Global YoY changes in retention for the top 200 grossing Hypercasual games (2024–2025)



# Hypercasual growth is shifting to Hybrid Puzzle

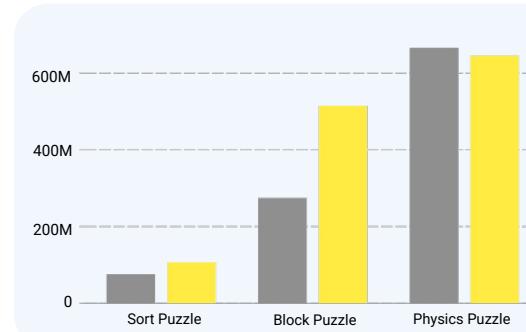
Block Puzzle is the main breakout. Revenue growth far outpaces audience growth: while revenue increased ~12x, downloads only grew ~1.9x. This is a clear hybridization effect.

Physics Puzzle is also growing through monetization. Revenue nearly doubled year over year, while downloads only went up by about 3%, which is typical for a shift from pure Hypercasual to Hybridcasual.

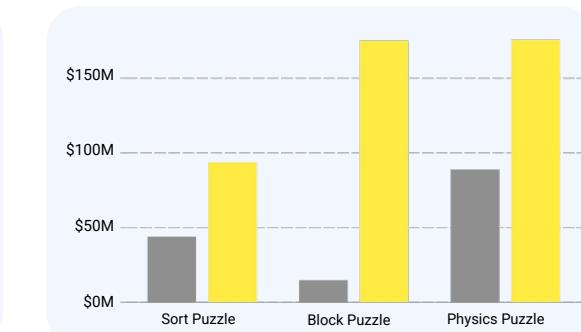
Sort Puzzle is the only large fast-growing segment with a balanced upward trend. Downloads grew by 41%, while revenue increased 2.1x. It is one of the most resilient formats, scaling both audience and monetization.

## The fastest-growing countries

### Downloads

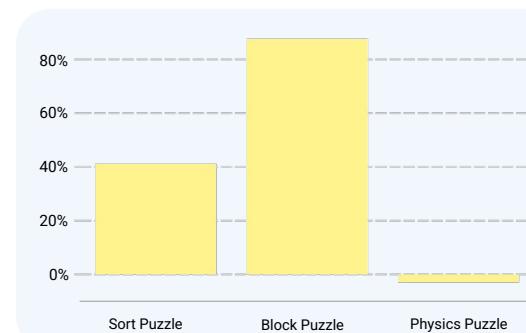


### Revenue

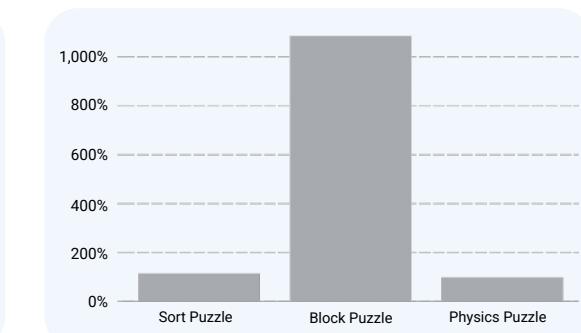


## The fastest-declining countries

### Downloads



### Revenue



# In top Hypercasual Puzzle games, the top 3 offers drive ~40% of revenue

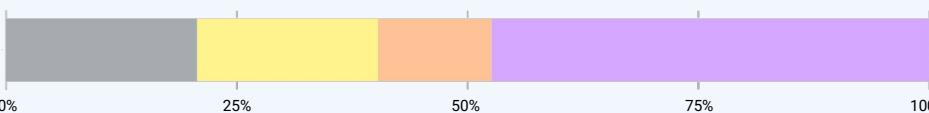
Monetization is most often built around special fail offers triggered by losing a level, as well as basic hard-currency bundles priced between \$2 and \$8.

## Revenue distribution of the top-grossing offers



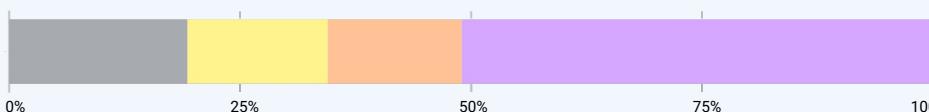
Color Block Jam

Fail offer - \$4.99    Coin pack 2 - \$7.99    Coin pack 1 - \$1.99    Other



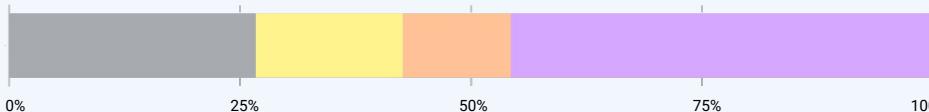
Screwdom

Beginner's bundle - \$9.99    Coin pack 1 - \$1.99    Keep up offer - \$4.99    Other



Hole People

Fail offer - \$4.99    Coin pack 1 - \$1.99    Coin pack 2 - \$7.99    Other



## Revenue of top-grossing apps, 2025



Color Block Jam



Screwdom



Hole People

\$100M

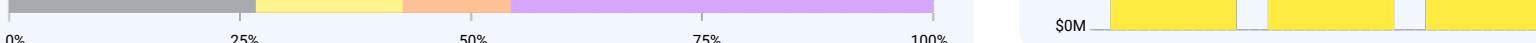
\$80M

\$60M

\$40M

\$20M

\$0M



# App Market Trends

# Key takeaways

## App market keeps accelerating

Compared to 2024, downloads grew +11.9%, and revenue rose +19.1%. Growth remains broad, with both mature and emerging markets contributing.

## Growth is multifaceted across categories

Nearly all categories are expanding, confirming strong market momentum. The market's growth is not limited to any single vertical.

## Only Personalization and Sports decline

These are the only two categories showing negative trends. All other categories continue to grow.

## Tools and Entertainment lead scaling

Among the largest categories, Tools revenue grew ~20% and Entertainment is up by ~17%. These segments remain the core volume drivers.

## Generative AI is the biggest standout

Generative AI showed the biggest jump, with revenue up ~273% and downloads up ~178%. It is the most notable structural shift in the market.

## Europe leads revenue growth among top countries

Germany, France, and the UK posted strong revenue gains (~18%–56%), making Europe a key driver, while the US still remains the largest market.

## LATAM downloads show saturation signs

Several LATAM markets saw downloads decline faster (from ~2% to ~6%), while revenue continues to grow, signaling a shift from user scaling to monetization.

## App retention stays broadly stable

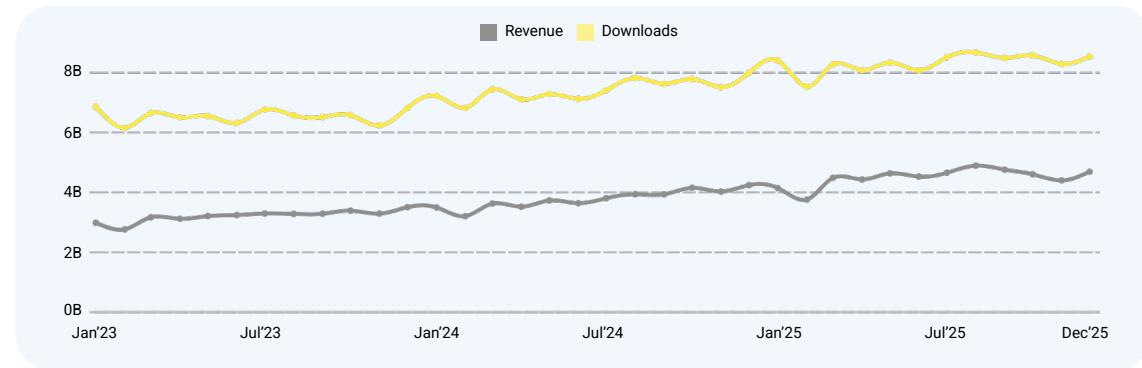
Retention is largely flat, with only minor gains (up to ~3% from D1 to D90), as top apps prioritize expansion over retention breakthroughs.

# App market continues to grow rapidly

For the second year in a row, the app market has seen strong growth in both downloads and revenue. Compared to 2024, downloads increased by 11.9%, while revenue grew by 19.1%.

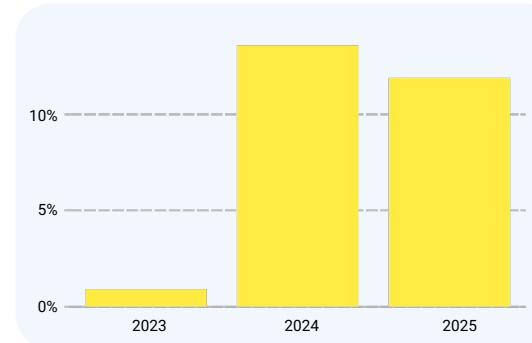
Upward momentum remains in place: mature markets keep expanding, and new points of growth continue to emerge.

## Global trends in revenue and downloads (2023–2025)

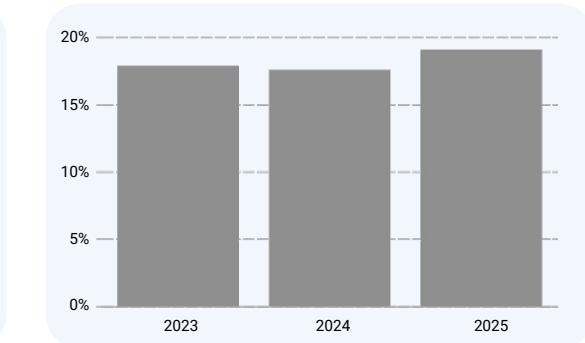


## Global YoY changes in revenue and downloads (2023–2025)

### Downloads



### Revenue



# Only Personalization and Sports are declining

Except for Personalization and Sports, all other categories in the market are growing their earnings.

Among the largest segments, Tools and Entertainment showed notably strong growth, up 20% and 17% in revenue, respectively.

The most notable shift, however, came from Generative AI, with revenue in the segment up 273% and downloads up 178%.

Tag	Downloads 2024	Downloads 2025	%	Revenue 2024	Revenue 2025	%	Top Apps
Entertainment	14.1B	15.7B	11.2%	\$17.8B	\$21.0B	17.6%	  
Social	9.2B	9.2B	0.1%	\$7.0B	\$7.6B	8.6%	  
Tools	19.3B	20.7B	7.2%	\$5.1B	\$6.2B	20.6%	  
Generative AI	1.3B	3.6B	178%	\$805.6M	\$3.0B	274%	  
Books & Reference	1.1B	1.3B	16.6%	\$2.9B	\$3.0B	3.0%	  
Photo & Video	5.4B	5.7B	4.9%	\$2.1B	\$2.7B	26.1%	  
Health & Fitness	2.9B	3.4B	15.8%	\$2.1B	\$2.1B	2.4%	  
Education	2.3B	2.7B	17.8%	\$1.4B	\$1.5B	8.0%	  
Business	2.3B	2.6B	13.5%	\$1.0B	\$1.2B	21.8%	  
Productivity	2.1B	2.5B	19.8%	\$919.8M	\$1.1B	16.4%	  
Sports Apps	1.2B	1.5B	21.9%	\$1.1B	\$951.0M	-13.5%	  
Lifestyle	2.7B	3.5B	25.9%	\$627.7M	\$805.0M	28.3%	  
Navigation	1.5B	1.8B	15.5%	\$573.6M	\$638.6M	11.3%	  
Shopping	6.3B	6.3B	0.8%	\$363.0M	\$586.1M	61.5%	  
Graphics & Design	918.0M	1.1B	17.0%	\$394.9M	\$495.2M	25.4%	  
News & Magazines	599.8M	650.2M	8.4%	\$433.9M	\$446.9M	3.0%	 
Finance	7.1B	7.5B	5.1%	\$175.9M	\$212.7M	20.9%	  
Travel	2.7B	3.1B	11.7%	\$146.3M	\$153.9M	5.2%	  
Personalization	2.6B	2.9B	14.2%	\$134.5M	\$128.8M	-4.2%	  
Weather	625.0M	857.8M	37.2%	\$113.2M	\$117.3M	3.6%	  
Auto & Vehicles	827.1M	1.0B	24.8%	\$80.2M	\$89.1M	11.1%	  
Food & Drink	2.0B	2.4B	19.9%	\$67.9M	\$87.4M	28.7%	  

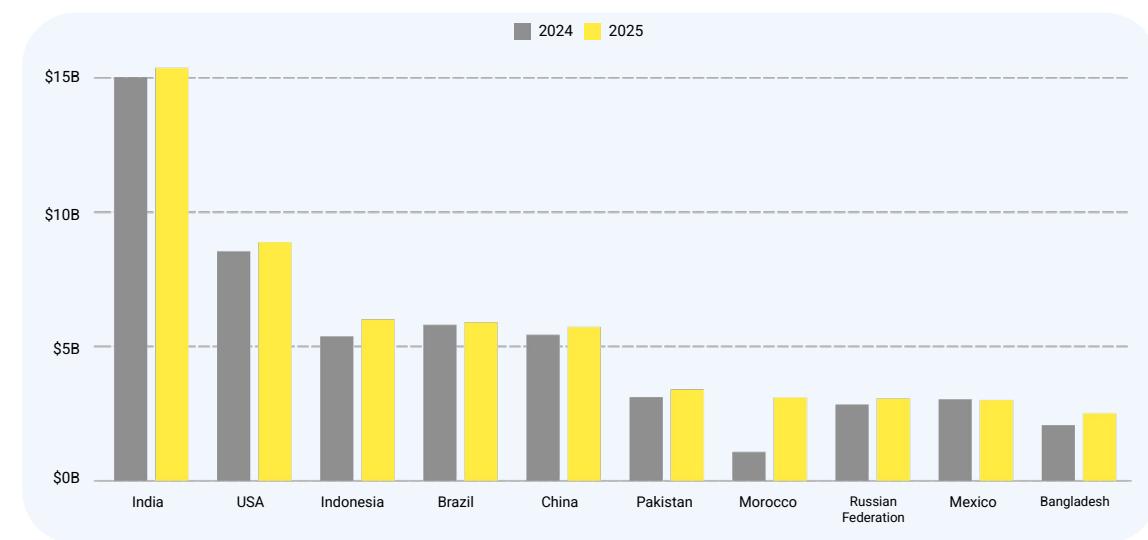
# Asia drives downloads growth for top countries

In 2025, downloads growth among the top categories was driven by large Asian markets. India, Indonesia, Pakistan, China, and Bangladesh showed steady growth of roughly 2%–12%. Except for China, this growth is large-scale but low-ARPU.

The United States posted modest growth, from 8.5B to 8.9B (+0.4B).

Top Latin American markets are stagnating. While Brazil showed only minimal growth (+1.7%), Mexico even saw a slight decline (-0.6%).

## Trends in downloads for the top 10 countries (2024–2025)



## YoY changes in downloads for the top 10 countries (2024–2025)



# Expert Take: Outlook for Asia in 2026

**Alexander Gordeev**

**AdQuantum**

Head of User Acquisition

The Tier-2 and Tier-3 APAC regions still show relatively low LTV. But given the rising cost of advertising and increasing competition in Tier-1 markets, it remains highly promising.

Looking ahead to 2026, it makes sense to focus on introducing direct web in-app payments and supporting payment methods that are familiar to users in Asian markets. At the same time, it's worth leaning into a lower-budget monetization model driven by stronger user engagement.

This approach would likely differ from the Tier-1 model, which depends on a high concentration of users with strong purchasing power.

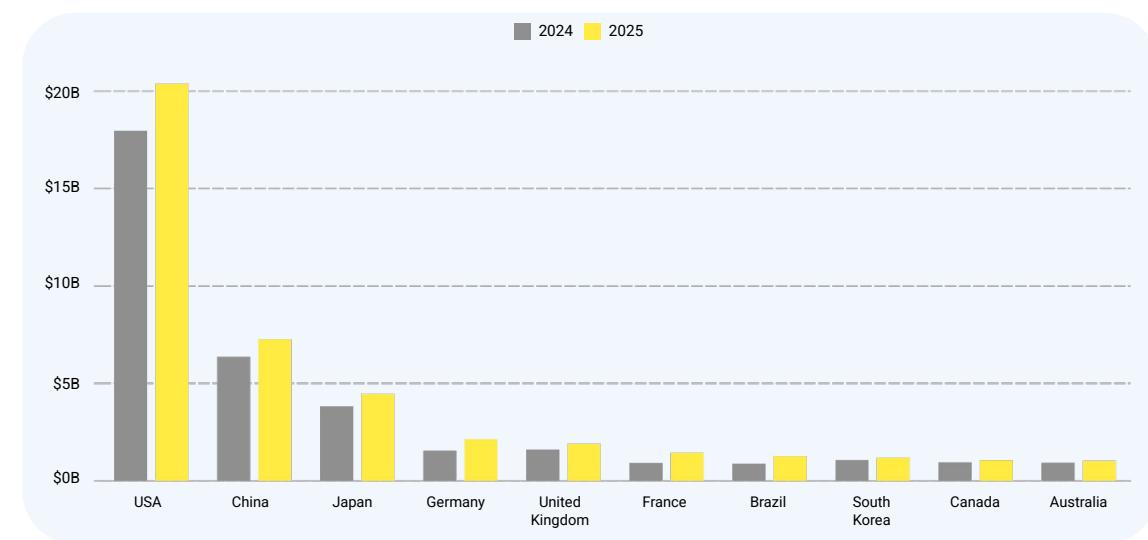
# Europe leads revenue growth

European markets show strong momentum and are becoming the key drivers of incremental growth. Revenue in Germany, France, and the United Kingdom increased by roughly 18%–56%.

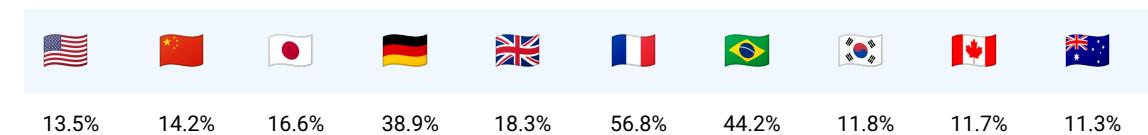
The United States remain the largest market, delivering the biggest absolute contribution to growth, which reflects strong monetization and high consumer spending power.

Brazil is also growing rapidly in revenue, up 44% on the previous year. It is a rare case of an emerging market that ranks among the top revenue earners and grows this fast, pointing to improving monetization rather than scale alone.

## Trends in revenue for the top 10 countries (2024–2025)



## YoY changes in revenue for the top 10 countries (2024–2025)



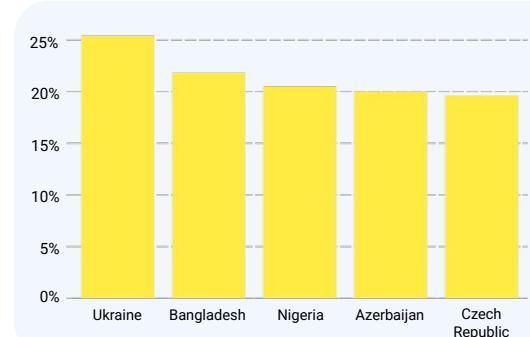
# LATAM is entering saturation

While revenue is growing across all regions, Latin American countries show a clear negative trend in downloads: in Colombia, Peru, the Dominican Republic, and Ecuador, downloads declined by 2%–6%.

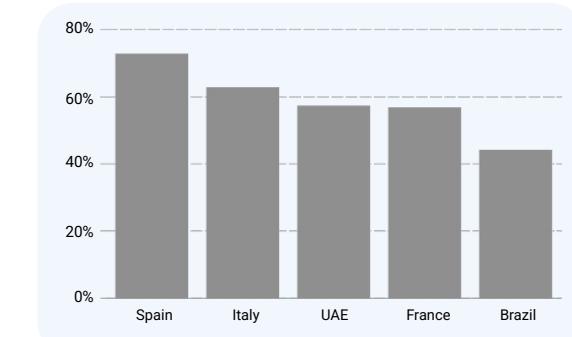
Western markets are growing the fastest in revenue. Spain, France, and Italy posted strong revenue growth of 50%–72%. Despite having clear leaders, non-gaming revenue gains are broader and more resilient than growth in downloads, with not a single country showing declining revenue on the previous year.

## The fastest-growing countries

### Downloads

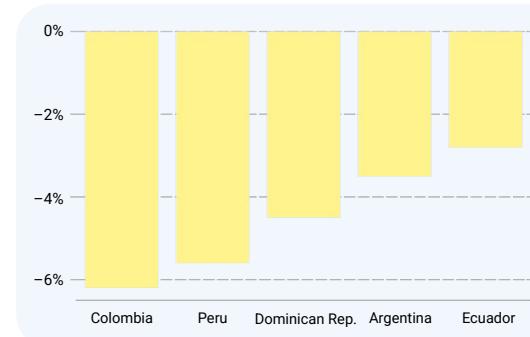


### Revenue



## The fastest-declining countries

### Downloads



### Revenue

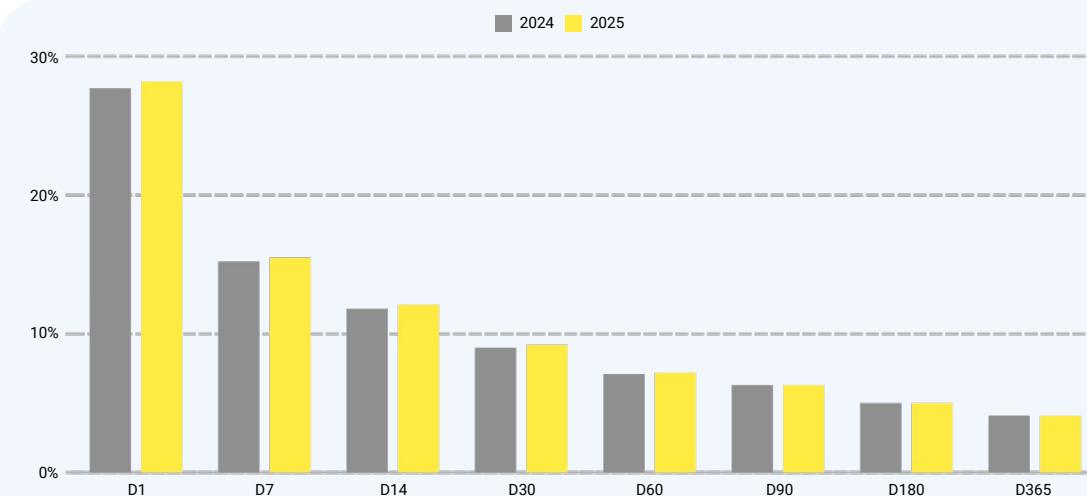
There are no countries with a revenue downtrend

# App retention remains stable

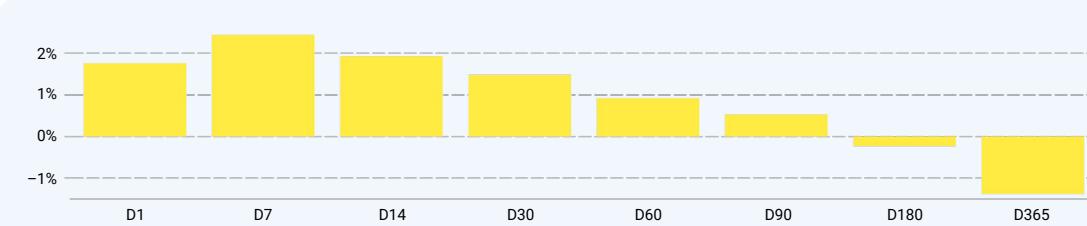
Compared to last year, retention across the entire user lifecycle has remained largely unchanged. On average, retention from day 1 to day 90 shows a slight increase of up to 3%, without any notable spikes.

Overall, the market is currently focused on expansion rather than retention, as most of its top apps have already implemented the majority of standard retention mechanics.

## Global trends in retention for the top 200 grossing non-gaming apps (2024–2025)



## Global YoY changes in retention for the top 200 grossing non-gaming apps (2024–2025)

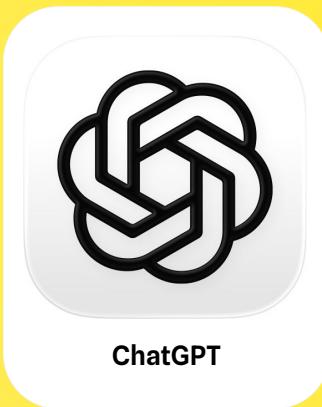


# Global app market leaders, 2025

Top Downloads		Downloads	YoY	Top Grossing		Revenue	YoY			
1		ChatGPT	990M	+193%	 9	1		TikTok - Videos, Shop & LIVE	\$4.83B	+28%
2		TikTok - Videos, Shop & LIVE	770M	-22%	 1	2		Google One	\$2.67B	+27%
3		Instagram	574M	-33%	 1	3		ChatGPT	\$2.33B	+513%  14
4		Facebook	487M	-23%	 1	4		YouTube	\$2.09B	+36%  1
5		Google Gemini	474M	+381%	 45	5		Tinder Dating App: Date & Chat	\$1.23B	+10%
6		WhatsApp Messenger	465M	-29%	 3	6		Disney+	\$1.19B	-14%  2
7		Temu: Shop Like a Billionaire	434M	-28%	 1	7		HBO Max: Stream Movies & TV	\$939M	+17%  1
8		CapCut: Photo & Video Editor	398M	-38%	 4	8		CapCut: Photo & Video Editor	\$816M	+117%  11
9		Telegram	340M	-32%	 2	9		腾讯视频-《剑来》第二季独播	\$735M	+15%  2
10		Snapchat	316M	-11%	 1	10		LinkedIn: Network & Job Finder	\$702M	+25%  2

# Trends in Generative AI apps

These are apps that use artificial intelligence to create new content, such as text, images, or sound, based on user input or prompts.



ChatGPT



Grok



ChatOn AI

# Key takeaways

## Generative AI shifts into maturity

In 2025, the segment entered a scalable phase. Its revenue hit \$3.0B, nearly three times that of 2024.

## Revenue outpaces downloads every year

Monetization is scaling faster than user acquisition. In 2025, downloads grew +178%, while revenue is up by +273.6%.

## Subscriptions drive repeatable usage

User behavior is moving from “try once” to regular use. Subscription-led models are the main growth lever.

## Retention declines despite hypergrowth

Retention fell across the full lifecycle. The biggest drop is in the earlier days (-6.2%), with mid- and long-term retention down 3.9%–4.5%.

## AI Chatbots dominate, led by *ChatGPT*

AI Chatbots are the fastest-growing niche. *ChatGPT* generated 82% of the niche's total revenue in 2025.

## AI Art: scale-first, weaker monetization

Downloads surged (+234%), while revenue grew by +99% only. This points to mass demand but expressly lower monetization efficiency.

## AI Music Generators: small, high-quality growth

Both downloads and revenue grew ~400%. Absolute scale is small, but dynamics are healthy.

## Pricing sweet spot: \$6–\$40 offers

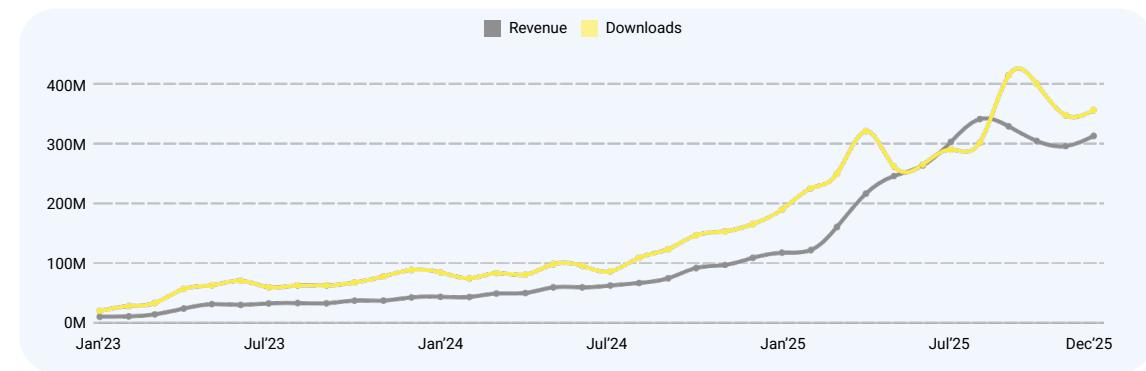
The core revenue of top AI apps comes from offers priced between \$6 and \$40 (the cheapest offers within each specific app).

# Generative AI shows unprecedented growth

In 2025, the Generative AI segment entered a mature, scalable market phase. Its revenue reached \$3.0B, nearly 3x higher than in 2024.

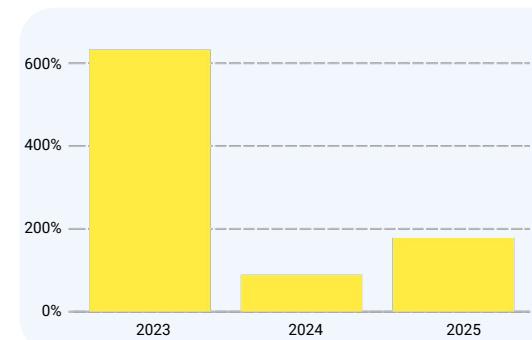
Across all years, revenue has grown faster than downloads. In 2025, downloads increased by 178%, while revenue grew by 273.6%. User behavior is increasingly shifting from initial curiosity to regular usage of apps with effective monetization, primarily driven by subscriptions.

## Global trends in downloads and revenue (2023–2025)

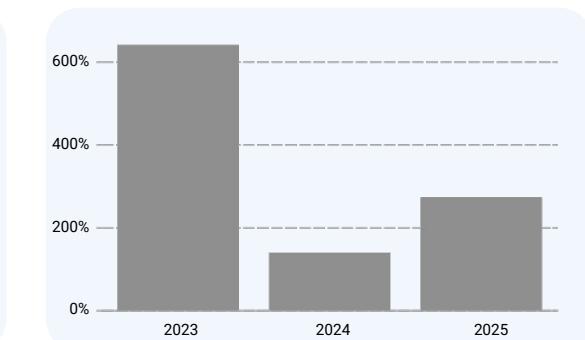


## Global YoY changes in downloads and revenue (2023–2025)

### Downloads



### Revenue

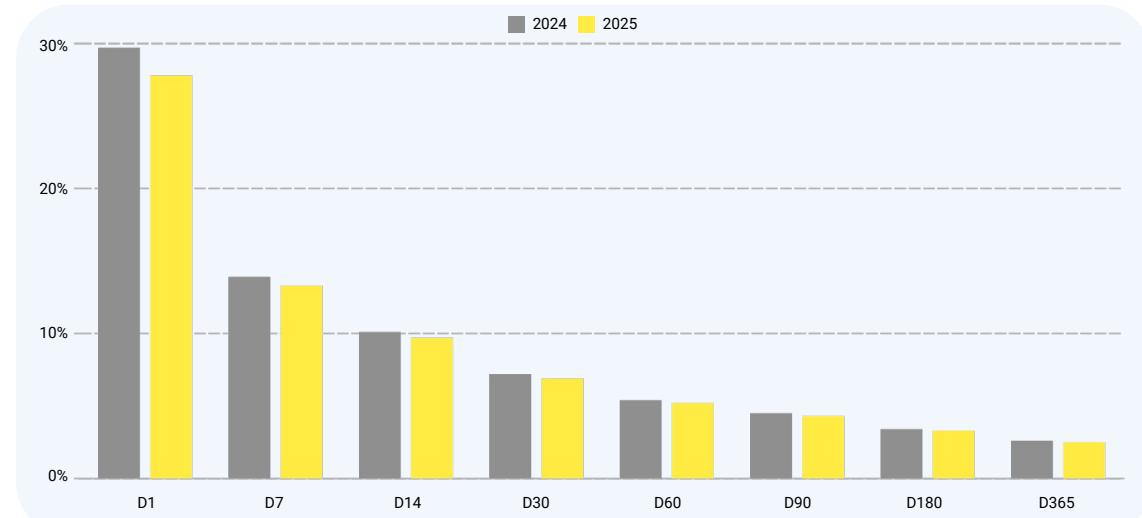


# Generative AI retention declines

Against the backdrop of explosive growth in downloads and revenue, as well as an increase in the number of apps, retention in the segment has decreased.

The decline is observed across the entire user lifecycle. The largest drop is observed in the first days of user life (-6.2%), while mid- and long-term retention decreased by 3.9%-4.5%.

Global trends in retention for the top 200 grossing Generative AI apps (2024–2025)



Global YoY changes in retention for the top 200 grossing Generative AI apps (2024–2025)



# AI Chatbot market is growing the fastest

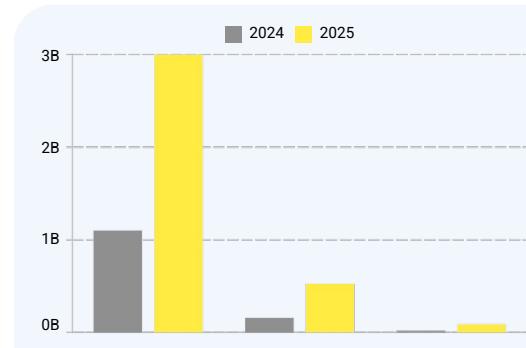
The AI Chatbot market is growing the fastest, but the main growth driver is *ChatGPT*, whose revenue accounted for 82% of the niche's total earnings in 2025.

AI Art Generators showed a 99% revenue growth, while downloads increased by 234%. This indicates strong mass demand, but relatively weaker monetization efficiency at the current stage.

AI Music Generators demonstrate small but high-quality growth. The niche recorded stable increases in both downloads and revenue at around 400%. While absolute figures remain modest, the underlying dynamics are healthy and sustainable.

## Global trends in downloads and revenue for Generative AI products (2024–2025)

Downloads

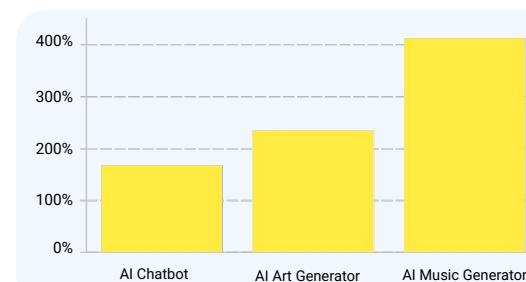


Revenue

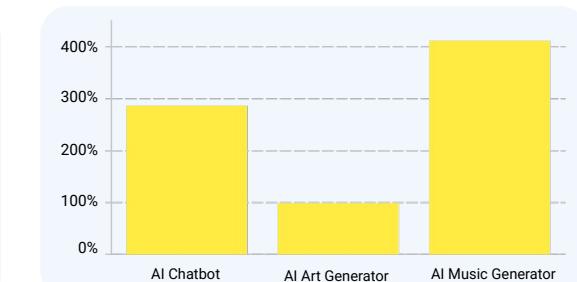


## Global YoY growth in downloads and revenue for Generative AI products (2024–2025)

Downloads



Revenue



# Top AI apps generate revenue primarily from low-priced offers

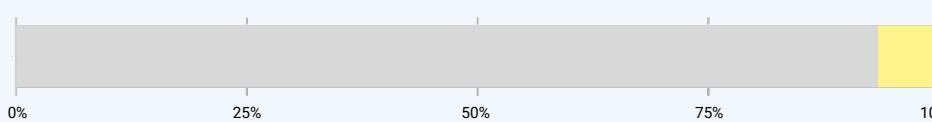
The core revenue of top AI apps comes from offers priced between \$6 and \$40 (the cheapest offers within each specific app). At the same time, annual subscriptions priced at \$100+ currently generate the least revenue.

## Revenue distribution of the top-grossing offers



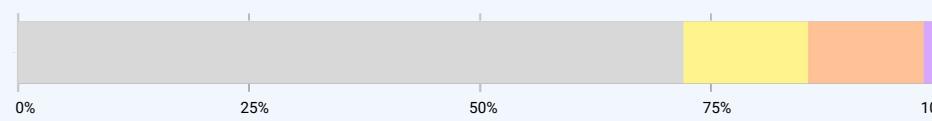
Chat GPT

ChatGPT Plus (monthly) - \$19.99 ChatGPT Pro (monthly) \$200 ChatGPT Pro (Monthly) \$200



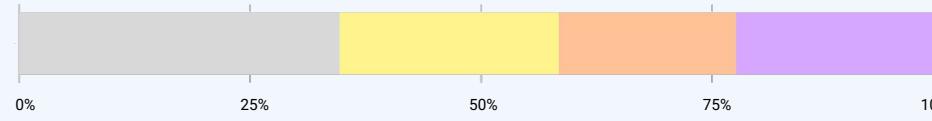
Grok

Supergrok (monthly) - \$30 Supergrok Heavy (monthly) \$300 Supergrok (annual) \$300 Other



Chat on AI

Premium (daily) - \$6.99 Premium (annual) - \$39.99 Premium (7 days) - \$6.99 Other



## Revenue of top-grossing apps, 2025



# Trends in Entertainment apps

These are apps that provide audio, visual, or interactive content for entertainment purposes.



TikTok



YouTube



Disney+

# Key takeaways

## Entertainment remains a mature growth market

The segment remains one of the largest on mobile. Growth is steady rather than explosive, supported by scale and repeat usage.

## Revenue consistently outpaces downloads

Monetization expanded faster than user acquisition every year. In 2025, revenue grew +17.6% as opposed to the +11% shown by downloads.

## Video formats are the growth engine

While OTT is stagnating, video-focused segments are driving growth. Expansion is increasingly concentrated in new video formats.

## Short Drama is the main volume driver

Short Drama led the downloads growth (up +279.5% YoY), while revenue gained +93.5%. It is the main driver of video-led expansion.

## Short Video and Video Sharing Platforms monetize better

Despite downloads declining by 8%–16%, these segments grew revenue by 27%–33%, signaling stronger monetization efficiency and ARPU.

## Retention improves across lifecycle

Retention increased across all horizons, led by long-term gains. D180–D365 rose by 11%–12%, while early-day retention grew by around 1%.

## Short Drama is stabilizing after hypergrowth

After posting its 1,000%+ revenue growth in 2024, the niche grew +94% in 2025 and entered a stability phase.

## Short-term subscriptions drive Short Drama revenue

Over 70% comes from 1-day and 7-day plans. Prices are often similar, with conversion boosted by discount framing.

# Entertainment segment shows steady growth

Entertainment remains one of the largest segments, and over the years, its revenue grew consistently faster than downloads. This trend continued in 2025: revenue increased by 17.6%, while downloads grew more moderately at +11%.

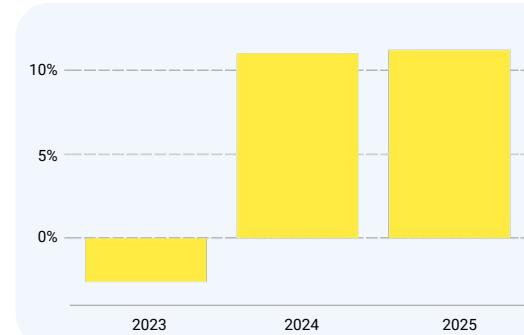
Double-digit revenue growth in 2024–2025 alongside moderate downloads growth indicates strong user loyalty.

## Global trends in downloads and revenue (2023–2025)

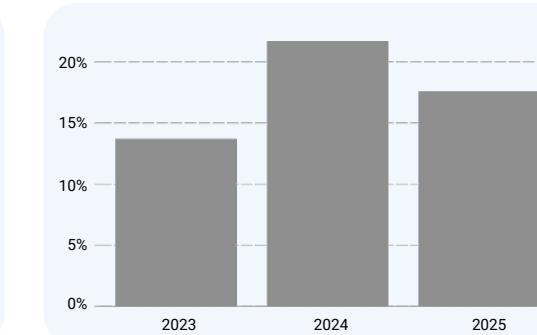


## Global YoY changes in downloads and revenue (2023–2025)

### Downloads



### Revenue



# Video content drives category growth

Against the backdrop of stagnation in the largest Entertainment segment, OTT, downloads declined by 7.9% while revenue increased modestly by 4.6%. At the same time, video-related apps delivered solid growth. The main driver of downloads growth was Short Drama. YoY downloads surged by 279.5%, while revenue increased by 93.5%.

Short Video and Video Sharing Platforms saw a decline in downloads of roughly -8% to -16%, but revenue continued to grow by 27% to 33%.

Tag	Downloads 2024	Downloads 2025	%	Revenue 2024	Revenue 2025	%	Top Apps
OTT	2.6B	2.4B	-7.9%	\$7.2B	\$7.6B	4.6%	  
Short Video	1.4B	1.1B	-16.2%	\$4.0B	\$5.1B	26.9%	  
Music Apps	3.0B	3.3B	10.5%	\$2.8B	\$3.2B	12.9%	  
Video Sharing Platform	428.4M	391.5M	-8.6%	\$1.7B	\$2.3B	33.4%	  
Short Drama	540.8M	2.1B	280%	\$905.1M	\$1.8B	93.5%	  
Live Streaming	410.3M	474.8M	15.7%	\$643.0M	\$585.1M	-9.0%	  
Entertainment: Other	2.0B	1.9B	-4.6%	\$230.9M	\$233.5M	1.1%	  
Apps for Games	1.8B	1.9B	7.1%	\$229.2M	\$231.3M	0.9%	  
Radio	122.2M	127.3M	4.1%	\$27.2M	\$29.3M	7.6%	  
Video Players	948.7M	1.0B	5.5%	\$11.2M	\$12.1M	7.9%	  
Rewarded Offers	672.9M	661.3M	-1.7%	\$5.9M	\$9.1M	53.4%	  
Lottery	83.6M	97.0M	16.0%	\$3.8M	\$2.5M	-35.5%	  
Tests	13.0M	16.2M	24.4%	\$308K	\$397K	29.0%	  
Ticket Service	241.6M	288.1M	19.3%	\$466K	\$363K	-22.1%	  

Study the growing markets in detail with our Market Segment Comparison tool!

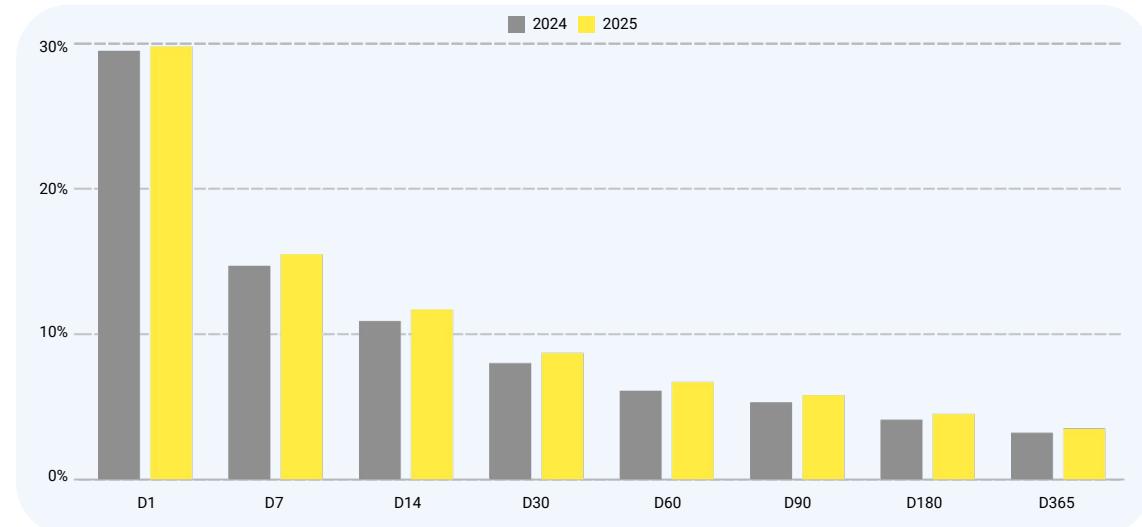
[Click here to learn more](#)

# Retention is steadily improving

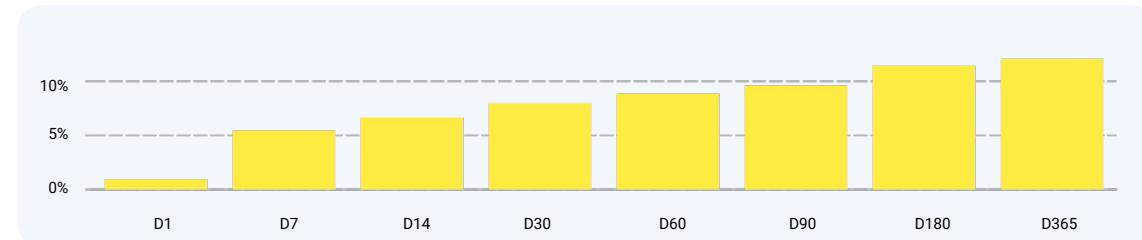
The Entertainment segment shows consistent retention growth across the entire user lifecycle, with gains strengthening over time. While early-day retention improved by about 1%, long-term retention (D180–D365) increased by 11%–12%.

This suggests the segment is getting better at retaining long-lived users, not just improving early onboarding. This trend is also supported by the growth dynamics in revenue and downloads.

Global trends in retention for the top 200 grossing Entertainment apps (2024–2025)



Global YoY changes in retention for the top 200 grossing Entertainment apps (2024–2025)



# Short Drama has entered a stability phase

After the explosive revenue growth of over 1,000% in 2024, the segment delivered a less dramatic but still solid revenue growth of 94% in 2025.

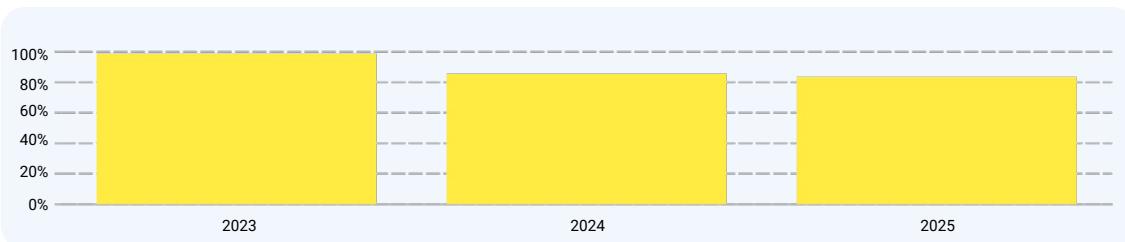
Short Drama is showing clear stability after scaling. Even in weaker months, revenue remains within the \$145–160M range without sharp drops.

Despite the decline in the oligopoly index, breaking into the top of the charts here still appears challenging, as the leading positions remain dominated by titles released in 2023 and 2024.

## Global trends in revenue (2023–2025)



## Global changes in the oligopoly index (2023–2025)



# Short Drama apps build revenue around short-term subscriptions

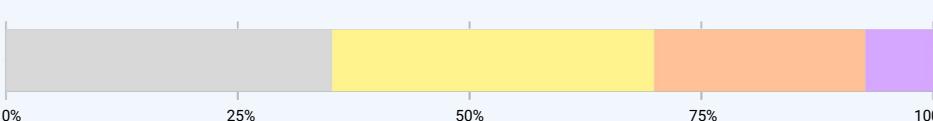
The majority of revenue (over 70%) comes from two subscription types: 1-day and 7-day plans. In many cases, both are priced similarly, with apps converting users through visual discounts rather than actual price differences.

## Revenue distribution of the top-grossing offers



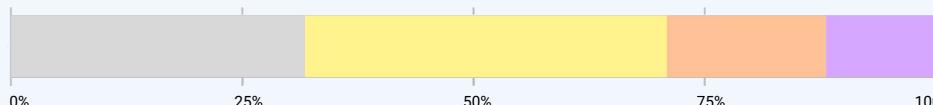
ReelShort

Subscription (daily) - \$19.99    Subscription (7 days) - \$19.99    One-time purchase - \$9.99    Other



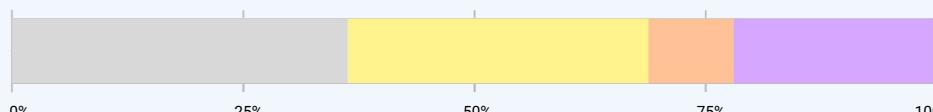
DramaBox

Membership (7 days) - \$17.99    Membership (daily) - \$19.99    Special offer - \$4.99    Other

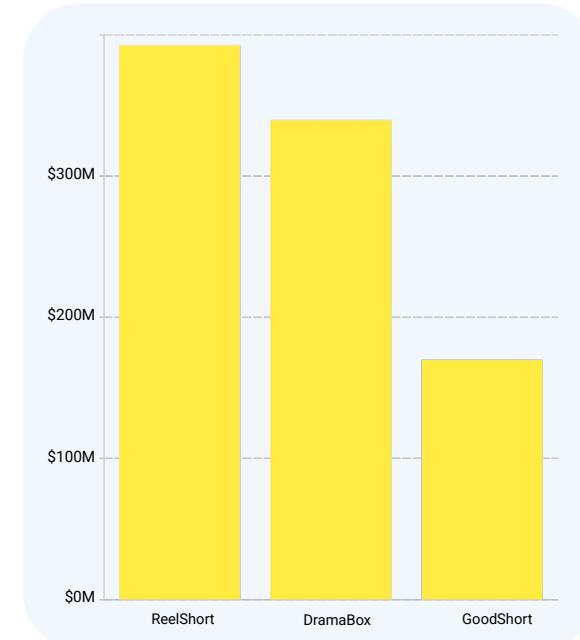


GoodShort

Weekly vip (daily) - \$19.99    Weekly vip (7 days) - \$19.99    2000 coins - \$19.99    Other



## Revenue of top-grossing apps, 2025



# Trends in Social apps

These are apps that allow users to communicate or share content via text, voice, or media.



Tinder Dating App



Snapchat



Bumble Dating App

# Key takeaways

## Social downloads reach their plateau

After the 2024 rebound, downloads growth nearly stalled in 2025 (+0.1%), signaling audience saturation. Growth has shifted away from scale expansion.

## Revenue grows despite install stagnation

Even with flat downloads, Social revenue continued to increase. In 2025, revenue rose by +8.6%, driven by monetization of the existing base.

## Social segment is increasingly fragmented

Different subgenres follow diverging trajectories. Growth and monetization are no longer evenly distributed across the category.

## Dating leads revenue and grows by scaling

Dating remains the largest subgenre by revenue. In 2025, its downloads grew +22%, while revenue increased more modestly at +4.8%.

## Messaging monetizes despite audience decline

Messenger and Microblogging grew their revenues by 23%–30% even as downloads fell. Premium features are driving higher ARPU from existing users.

## Retention softens across longer horizons

Mid- and long-term retention dipped slightly by 1%–1.5% YoY. Overall retention remains stable, reflecting a mature market.

## Dating peaks and enters cooldown

The Dating segment hit an all-time high in August 2025 at nearly \$350M per month, followed by a decline to around \$270M.

## Dating leaders vary subscription durations

*Bumble* and *Hinge* lean on monthly plans, while *Tinder* is driven by daily and 7-day offers.

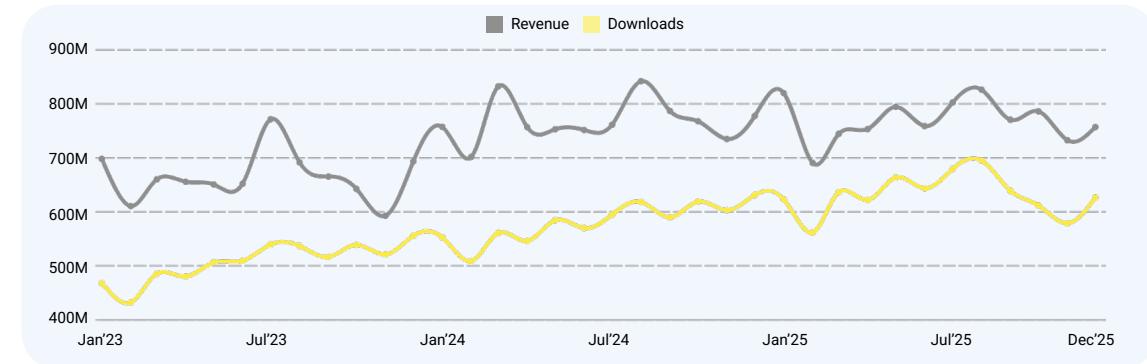
# Social's downloads have reached their plateau

The Social segment has stabilized in scale and shifted into a monetization-led growth phase driven by the existing user base.

After the rebound in 2024 (+15.5%), downloads growth in 2025 nearly stalled (+0.1%), pointing to audience saturation and a mature market.

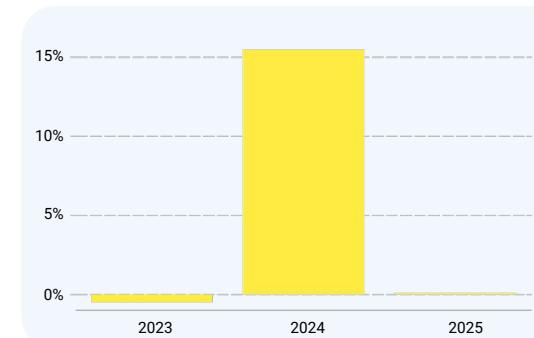
Despite stagnant installs, revenue has increased every year. In 2025, revenue grew by +8.6%.

## Global trends in downloads and revenue (2023–2025)

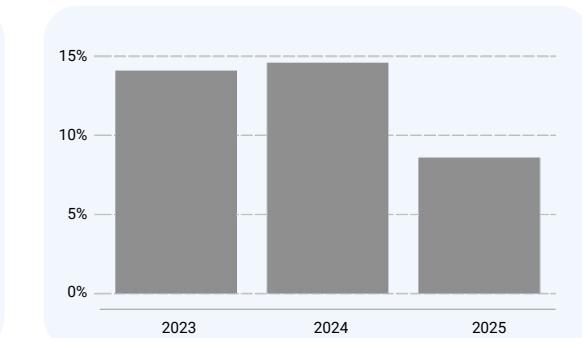


## Global YoY changes in downloads and revenue (2023–2025)

### Downloads



### Revenue



# Social segment is increasingly fragmented

Dating remains the largest subgenre by revenue. In 2025, the segment posted modest revenue growth of +4.8%, while downloads increased more significantly by +22%.

Messenger and Microblogging grew their revenues by 23%–30% despite declining downloads, indicating strong monetization of the existing user base through premium features.

Social Networks showed a structural decline. Traditional social networks are losing audience, with downloads down 17% YoY, while keeping revenue relatively stable.

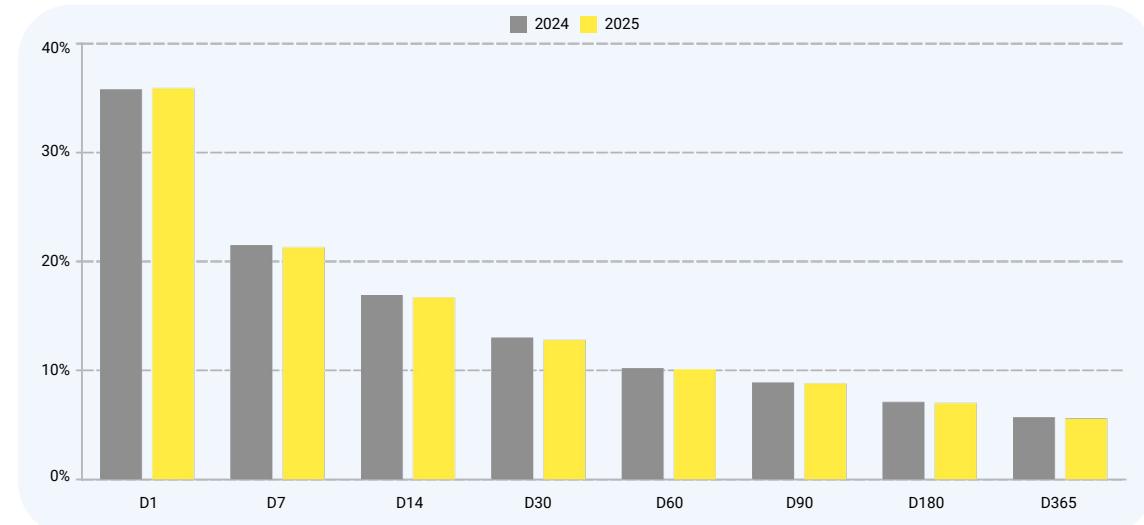
Tag	Downloads 2024	Downloads 2025	%	Revenue 2024	Revenue 2025	%	Top Apps
Dating	894.0M	1.1B	21.9%	\$3.6B	\$3.7B	4.8%	  
Messenger	2.8B	2.4B	-14.6%	\$1.1B	\$1.5B	30.3%	  
Chat	2.0B	2.6B	31.6%	\$1.1B	\$1.1B	3.0%	  
Social Network	2.2B	1.8B	-17.4%	\$570.9M	\$588.4M	3.1%	  
Microblogging	565.5M	498.1M	-11.9%	\$180.3M	\$222.5M	23.4%	  
Social: Other	524.7M	521.1M	-0.7%	\$219.2M	\$222.3M	1.4%	  
Social Virtual World	81.4M	97.0M	19.2%	\$167.1M	\$164.7M	-1.5%	  
Social Account Stats	123.4M	120.0M	-2.7%	\$30.7M	\$33.5M	9.2%	  
Community & Forum	138.9M	169.5M	22.1%	\$35.2M	\$32.6M	-7.3%	  

## Mid- and long-term retention dips

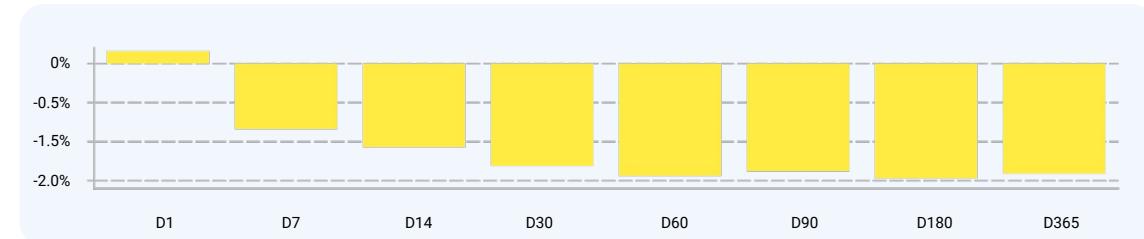
Retention in the category has stabilized and reached a plateau, with a small YoY decrease across mid- and long-term horizons.

Overall, retention among the Social apps remains stable with a mildly negative trend. Mid- and long-term retention declined by around 1%–1.5%.

Global trends in retention for the top 200 grossing Social apps (2024–2025)



Global YoY changes in retention for the top 200 grossing Social apps (2024–2025)



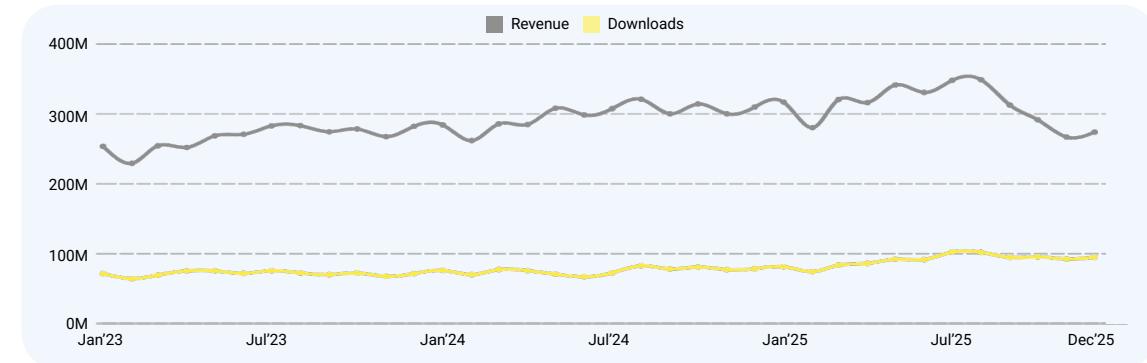
# Dating reaches an all-time high in 2025

Late 2025 was a cooldown period for Dating apps. After the segment had reached an all-time high in August at nearly \$350M per month, revenue declined to around \$270M per month shortly after the peak.

The top 10 apps account for over 65% of the segment's total revenue. Compared to last year, this remains generally unchanged. However, the picture differs for the downloads. In 2024, the top 10 apps represented 28% of the segment's total downloads, while in 2025, their share fell to 24%.

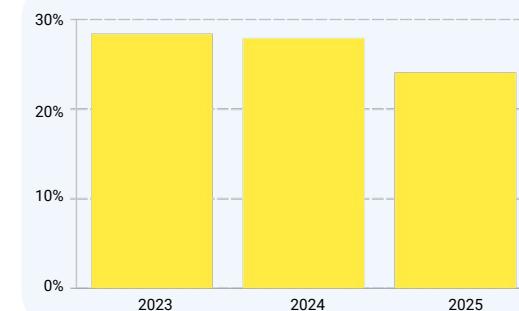
The decline is modest, but it creates room for the rest of the market to grow their downloads.

## Global trends in downloads and revenue (2023–2025)

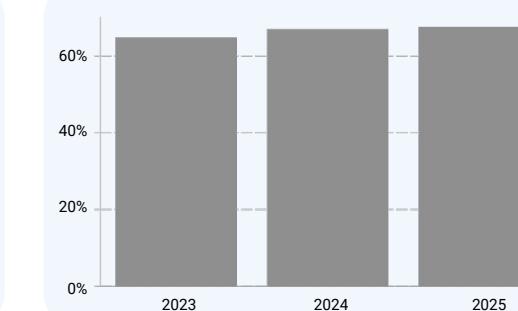


## Global YoY changes in downloads and revenue (2023–2025)

### Downloads



### Revenue



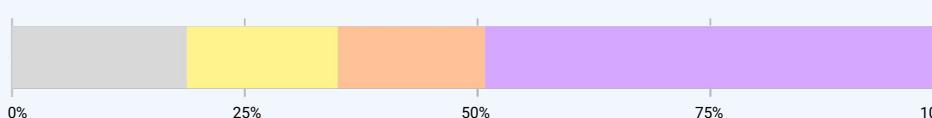
# Top Dating apps focus on different subscription durations

Unlike *Bumble* and *Hinge*, which rely more on monthly subscriptions, *Tinder* generates the largest share of revenue from daily and 7-day offers. Overall, monetization in the segment is subscription-led, while one-time purchases and add-ons play a secondary role.

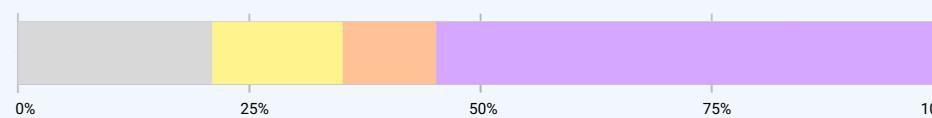
## Revenue distribution of the top-grossing offers



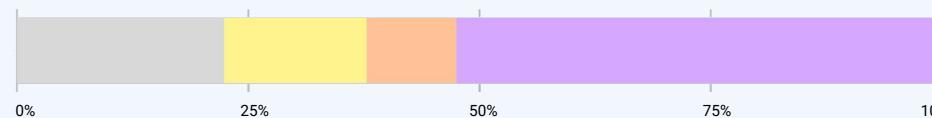
Tinder gold (daily) - \$13.99    Tinder gold (7 days) - \$18.99    Tinder gold (monthly) - \$24.99    Other



1 month premium (monthly) - \$39.99    7 days premium (daily) - \$24.99    7 days premium (7 days) - \$19.99    Other



Hingex subscription (monthly) - \$49.99    Hinge+ subscription (monthly) - \$34.99    Hinge+ subscription (daily) - \$19.99    Other



## Revenue of top-grossing apps, 2025



# Trends in Tools apps

These are apps that offer utilities or functions to perform specific tasks or solve problems.



Google One



Gmail - Email by Google



Dropbox

# Key takeaways

## Tools segment shifts toward monetization-led growth

The category is moving away from pure scale expansion. Revenue growth accelerated to +20.6% in 2025, outpacing downloads.

## Cloud Storage drives Tools revenue

Cloud Storage is the largest revenue contributor in the category. Despite a 3% YoY dip in downloads, revenue grew by +21.6% through strong monetization.

## Antivirus & Cleaner rebounds strongly

The segment recovered after a 2023 decline. Downloads surged +77.5% YoY, with revenue up +32.9%.

## Email monetization accelerates sharply

Email apps showed limited downloads growth but strong monetization. Revenue increased by +60.1% YoY, driven by premium features.

## Retention weakens in mid- and long-term

While early retention remains stable, mid- and long-term retention fell by up to 6.6%. This points to lower repeat usage and lower long-term value.

## Release activity surges, AI adoption scales

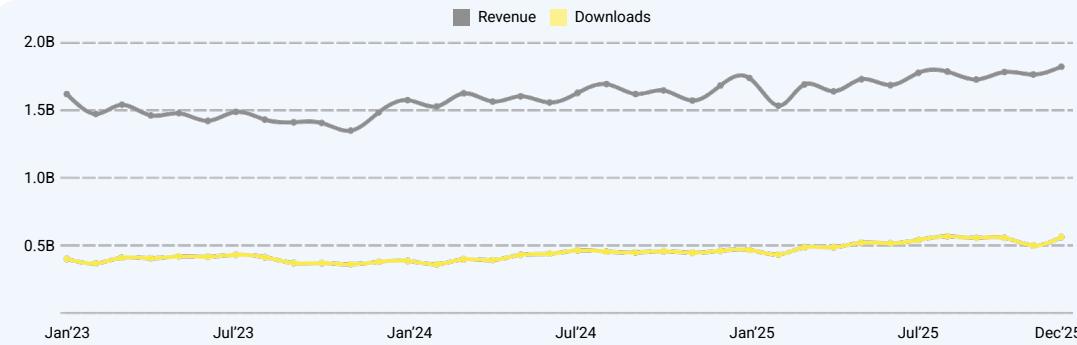
In 2025, total releases grew nearly 4x YoY, while AI-based releases almost tripled. New apps increasingly use AI for storage cleanup and optimization.

# Tools is shifting toward monetization-led growth

Tools remains one of the most mass-market categories by downloads volume. Downloads have been growing for two consecutive years, with a slight slowdown in 2025: +7.2% in 2025 versus +9.9% in 2024.

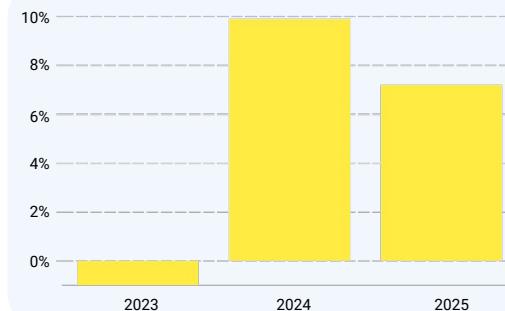
Revenue shows a stronger trend. After only +8.3% growth in 2024, it accelerated to +20.6% in 2025.

## Global trends in downloads and revenue (2023–2025)

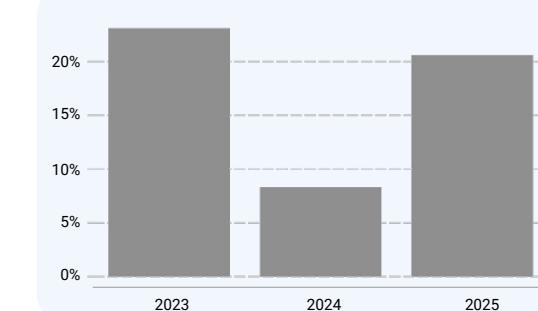


## Global YoY changes in downloads and revenue (2023–2025)

### Downloads



### Revenue



# Cloud Storage is the main revenue driver

Cloud Storage remains the top revenue driver within the Tools category. Despite stagnant downloads (-3% YoY), the segment delivered strong revenue growth (+21.6%) driven by active user monetization.

Antivirus & Cleaner is one of the strongest growth drivers. Downloads grew +77.5% YoY, while revenue increased by +32.9%.

Email monetization has accelerated sharply. Despite flat downloads, the segment posted +60.1% YoY revenue growth.

Tag	Downloads 2024	Downloads 2025	%	Revenue 2024	Revenue 2025	%	Top Apps
Cloud Storage	449.0M	435.3M	-3.1%	\$2.9B	\$3.5B	21.6%	
Tools: Other	2.8B	3.1B	8.8%	\$390.6M	\$476.5M	22.0%	
VPN	2.5B	2.2B	-14.9%	\$331.5M	\$366.4M	10.6%	
Antivirus & Cleaner	534.5M	948.8M	77.5%	\$260.2M	\$345.8M	32.9%	
Email	294.8M	286.7M	-2.7%	\$209.3M	\$335.1M	60.1%	
Browsers & Search Engines	1.3B	1.4B	6.5%	\$158.6M	\$174.3M	9.9%	
Identifier	109.3M	151.6M	38.7%	\$160.3M	\$167.6M	4.6%	
Security	942.2M	955.9M	1.5%	\$104.8M	\$112.1M	6.9%	
Translator	558.3M	603.3M	8.1%	\$86.1M	\$97.2M	12.9%	
Caller Identification	522.3M	588.9M	12.7%	\$90.3M	\$94.3M	4.5%	
Remote Control	956.3M	1.1B	10.7%	\$74.9M	\$86.7M	15.7%	
Camera	682.0M	846.8M	24.2%	\$56.0M	\$62.8M	12.0%	
QR Scanner	480.6M	439.8M	-8.5%	\$39.6M	\$41.6M	5.1%	
Recorder	416.4M	399.3M	-4.1%	\$41.4M	\$39.4M	-4.7%	
Keyboard	419.9M	403.3M	-3.9%	\$42.7M	\$36.3M	-14.8%	
Share	540.2M	525.1M	-2.8%	\$11.9M	\$34.5M	189%	
Screen Broadcast	272.1M	243.5M	-10.5%	\$25.5M	\$26.4M	3.6%	
Equalizer	174.7M	182.1M	4.3%	\$27.9M	\$25.6M	-8.2%	
Print	100.0M	112.5M	12.4%	\$14.3M	\$21.7M	51.5%	
File Manager	166.3M	168.9M	1.5%	\$16.7M	\$18.4M	10.3%	

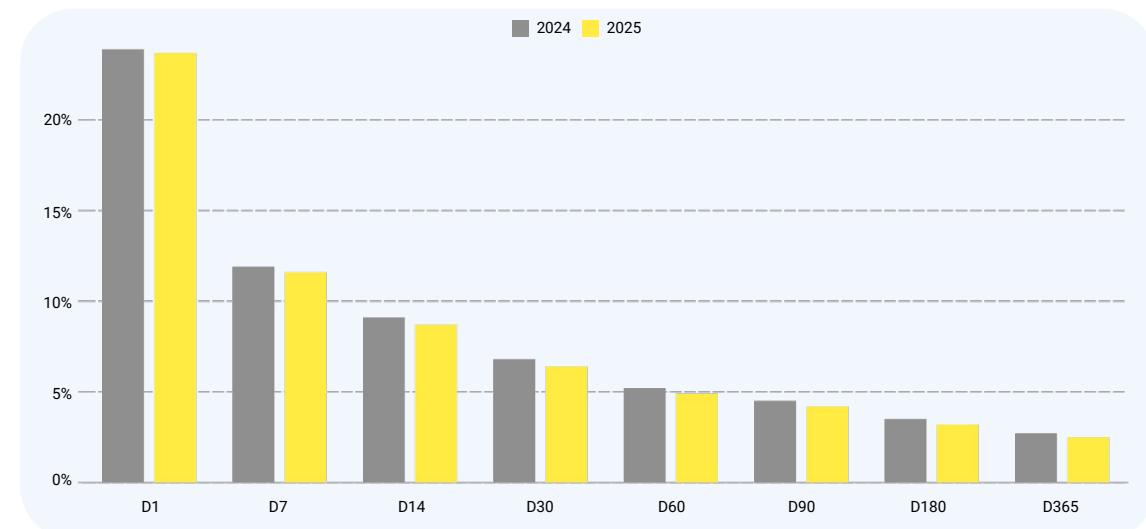
# Retention is declining throughout lifecycle

While early retention is almost unchanged ( $-0.6\%$  YoY), mid- and long-term retention decreased, falling by up to  $6.6\%$ .

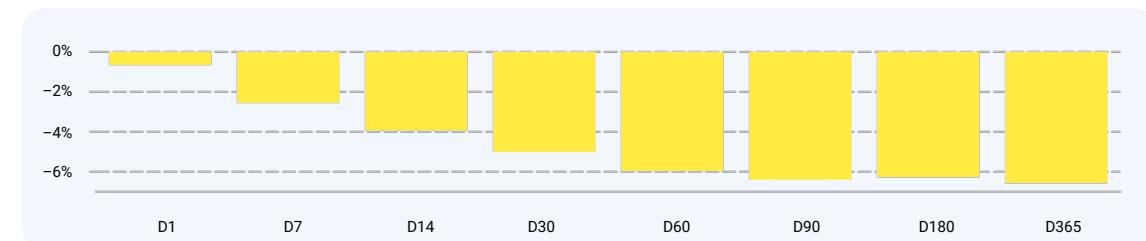
This indicates weakening long-term value and lower repeat usage.

Such a retention decline is typical for utility categories, where users often engage with apps for one-off or occasional needs.

Global trends in retention for the top 200 grossing Tools apps (2024–2025)



Global YoY changes in retention for the top 200 grossing Tools apps (2024–2025)



# Users are more storage-conscious

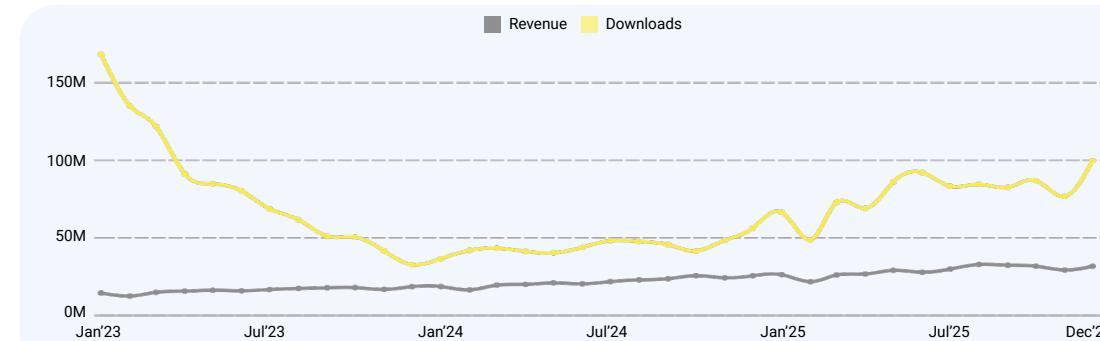
The Antivirus & Cleaner segment is recovering after a decline in downloads in 2023. The number of releases in 2025 increased nearly fourfold compared to the previous year.

The number of app releases featuring AI nearly tripled compared to 2024.

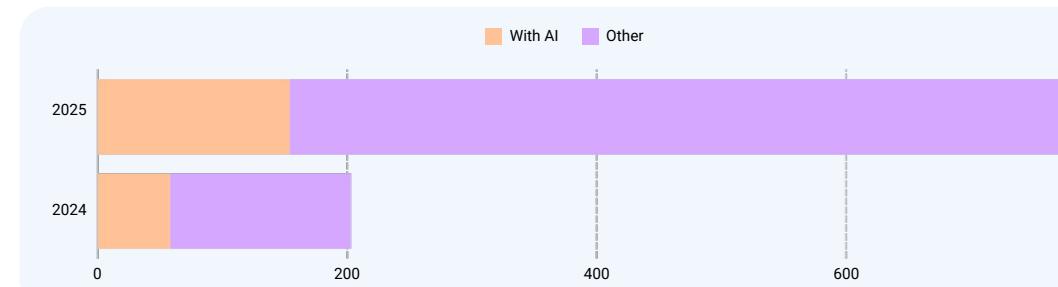
Users are showing much stronger interest in apps designed to free up phone storage. Compared to last year, downloads in the Antivirus and Cleaner category grew by 77%, driven by apps focused on storage cleanup. Some of them, such as [Phone Cleaner - AI Cleaner](#), also use AI in their algorithms.

Explore market shifts, identify competitors, and track new releases with our designated [Advanced Search](#)

## Global trends in downloads and revenue (2023–2025)



## App release dynamics in the segment (2024–2025)



## 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.

### Tianyi Gu

**Newzoo**

Manager, Market Analysis

AppMagic's platform has been a great asset for enhancing Newzoo's analytical capabilities in the mobile space. Its comprehensive tools and features have helped us provide timely, actionable insights to our clients. AppMagic's team stands out in its commitment to innovation and responsiveness, and we value our partnership with them.

## Testimonials

### Pedro Ramos

#### Outfit 7

Game Data Scientist & Game Designer

AppMagic is an outstanding platform if you need reliable data to conduct effortless market investigations and draw various comparisons from growth to performance, making it a perfect fit for a wide range of users (from high-level decision-makers to growth teams and designers). As a Game Data Scientist and Designer, I rely on AppMagic to dive deep into product performance, exploring my hunches and hypotheses, and ultimately gain the clarity I need to confidently steer my projects in the right direction. Their teams' commitment to listening and evolving alongside their users, paired with the seamless, user-friendly interface of their platform, makes them an indispensable tool to navigate the mobile gaming landscape.

### Kadir Danisman

#### Spektra Games

CEO & Founder

AppMagic has been instrumental in helping us stay on top of mobile game industry trends, offering powerful tools to explore subgenres, categories, and the marketing strategies of top apps. It has significantly shaped our approach to game development and strategic planning.

We have used AppMagic for the last 12 months, and it helped us a lot as we have been shaping our next game plans by analyzing the market and potential subgenres. I have been using it almost every day.

### Seohee Kwon

#### Supercell

Director of Publishing

AppMagic's insights allow us to track market trends, analyze competitor strategies, and adapt quickly to changes in the hyper-casual gaming landscape. Their data empowers our team to stay agile and deliver games that resonate with players globally.

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



**reports@appmagic.rocks**