Sensor Tower Report

State of Gaming 2026

The definitive video game industry report across mobile, PC, and console.

Executive Summary | Key Takeaways

01

Mobile Gaming Shifts Towards Monetization

As downloads continue to decline while revenue holds steady, each download must generate more value. Retaining and monetizing existing players is even more critical.

02

PC Gaming Delivers Another Record Year

On Steam, units sold, premium game revenue, and game releases all reached new highs, with growth led by AAA and AA publishers in Action.

03

YouTube Gains Mobile Ad Share, Loses PC/Console

Mobile app networks still take the majority of mobile game ad spend, and YouTube leads PC/Console channels. YouTube share shifted from PC/Console toward mobile.

04

Battlefield 6 is #1 in a Crowded Year for Shooters

It is the best-selling PC/Console game of 2025, in a market with titans like Call of Duty and Fortnite and a year with other massive launches like Delta Force and Marvel Rivals.

05

4X Strategy Takes Over Mobile

Strategy is the only genre to gain in revenue, downloads, and time spent, led by the #1 and #2 games by revenue of 2025, Last War: Survival and Whiteout Survival.

06

Friend Group, Content Creator Driven Games Rise

The #2 and #3 best-selling PC/Console games of 2025, R.E.P.O. and PEAK, outsold AAA titles with huge budgets and audiences. GTA 6 will be the culmination of this trend.

Executive Summary | Gaming Landscape at a Glance

Mobile Game Downloads

50 Billion

YoY Growth

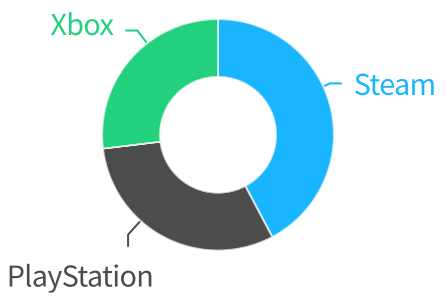
-7.0%

iOS & Google Play
Excludes third-party Android in China and other markets.

95,000 mobile games downloaded per minute in 2025

PC/Console Downloads

2 Billion



Steam, PlayStation, and Xbox

3,800 PC/Console games downloaded per minute in 2025

Mobile Game IAP Revenue

$82 Billion

+1.4%

YoY Growth

iOS & Google Play
Excludes third-party Android in China and other markets.

$1.62 IAP revenue per download in 2025

Steam Premium Revenue

$11.7 Billion

+13.0%

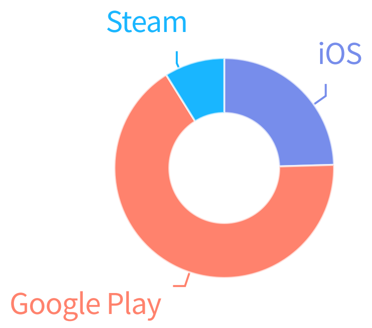
YoY Growth

Worldwide

+50% vs 2022
Steam premium revenue ($7.8B in 2022)

Games Released

225 Thousand



iOS, Google Play, & Steam

617 games released per day in 2025

Contents

Sensor Tower | Our Customers

Top publishers trust Sensor Tower insights to grow their business.

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

About this data: Methodology

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

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

Figures cited in this report reflect iOS App Store and Google Play download and revenue estimates for January 1, 2014 through December 31, 2025.

In-app purchase (IAP) revenue includes paid downloads, in-app purchases, and subscriptions from the iOS App Store and Google Play. This does not include any revenue from advertisements or third-party purchases.

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

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

View Detailed Report Methodology Here.

About this data:
VGI Methodology

Sensor Tower's Market Insights team compiled the PC/Console download and MAU estimates provided in this report using the Sensor Tower Video Game Insights platform.

All games (140k+) across all countries (50+) covered where the platform is available.

PC/Console figures cited in this report reflect estimates for Steam, PlayStation, and Xbox.

PC/Console downloads include premium, free-to-play, and downloads that were free through a subscription service.

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

Revenue estimates are gross — inclusive of any percent taken by the platform.

See the winners here!

Sensor Tower

Interested in our Digital Market Insights Solutions?

If you want to learn more about Sensor Tower, please request a demo:

Request a free demo!

Get the latest insights on our blog: **sensortower.com/blog**

01

Gaming Market Overview

Gaming is mature across mobile, PC, and console, but player behaviors, platform dynamics, and publisher strategies continue to evolve. Mobile adapts to shrinking downloads while PC sees another record year.

"One of King's superpowers is knowing how to look at the data we have to capture unique insights, which enabled us to be at the top of the market for over a decade. Sensor Tower plays a key role in our operations, as our go-to external market data provider, allowing us to catch the latest trends before they emerge and stay on top of our game"

Laurence Harris
Head of Corporate Strategy
King

Market Overview

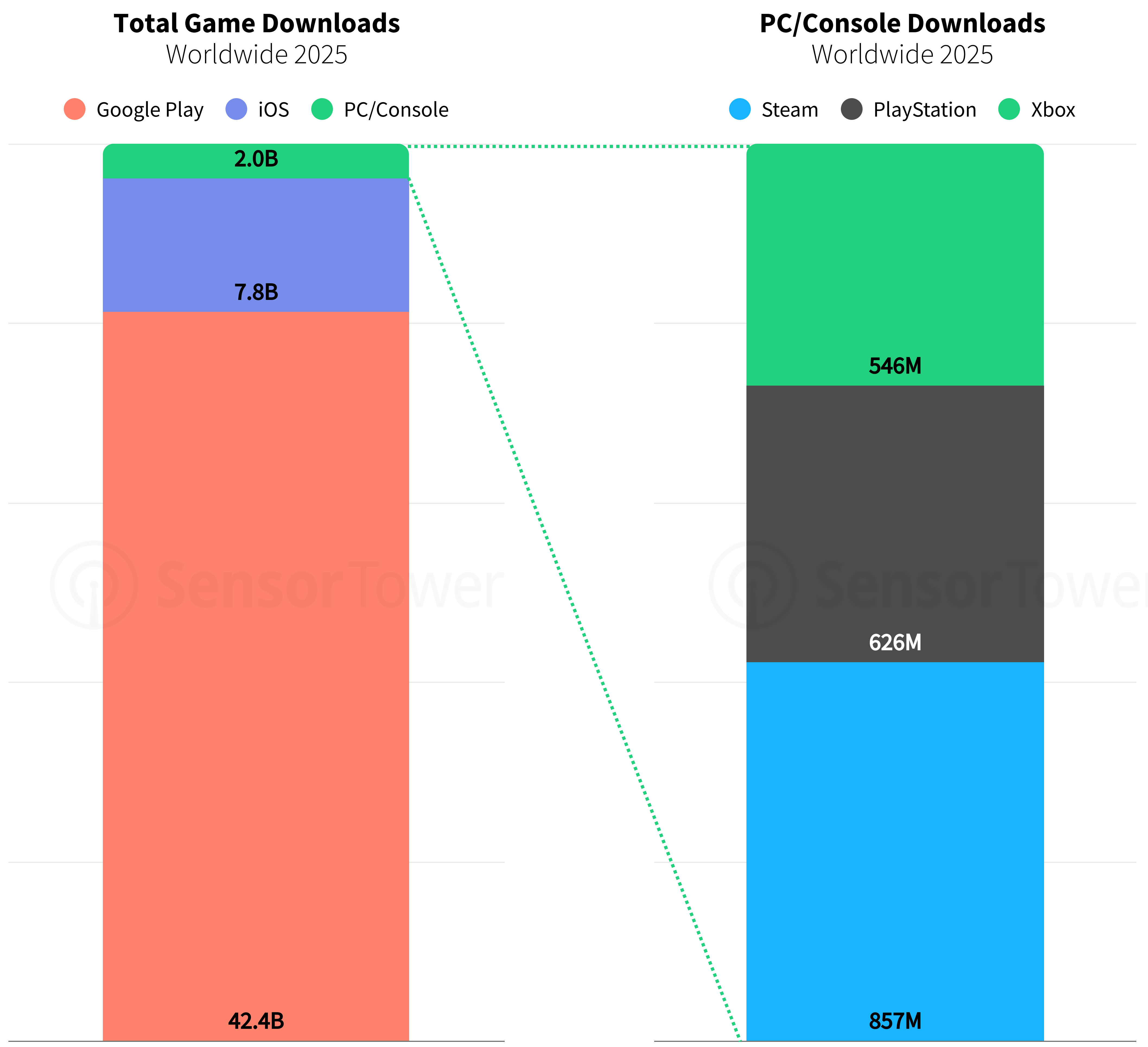
Mobile Brings Reach, PC/Console Brings Depth

Games across mobile and PC/Console were downloaded 52B times in 2025, with 50B on mobile. Google Play accounted for 81% of game downloads, followed by the App Store at 15%, while PC/Console represented 4%. Within PC/Console, Steam led downloads in 2025, ahead of PlayStation and Xbox.

Mobile drives reach because of smartphone penetration and free-to-play dominance on mobile. In 2025, 96% of mobile game downloads were free-to-play, rising to 99% on Google Play. The App Store delivered fewer downloads but generated outsized in-app purchase revenue and showed stronger penetration among high-value audiences, especially in the US.

PC/Console generated 2B downloads, far fewer than mobile, but delivered deeper engagement and stronger monetization per player. New AAA titles now commonly launch at $70, and buyers typically expect dozens of hours of dedicated play.

Understand gaming cross-platform.
Cross-platform trends are the norm in 2026. Combine Sensor Tower App Performance Insights and Video Game Insights to analyze gaming across mobile, PC, and console.



Source: Sensor Tower Mobile App Insights, Video Game Insights
Note: Games on mobile classified using Sensor Tower's Game IQ taxonomy. PC/Console downloads inclue free-to-play, premium, and subscription downloads.

PC Breaks Records as Mobile Matures

Steam delivered record years across key metrics in 2025, with revenue up 13%, downloads up 6%, and releases up 8%, reflecting continued momentum across AAA, AA, and Indie.

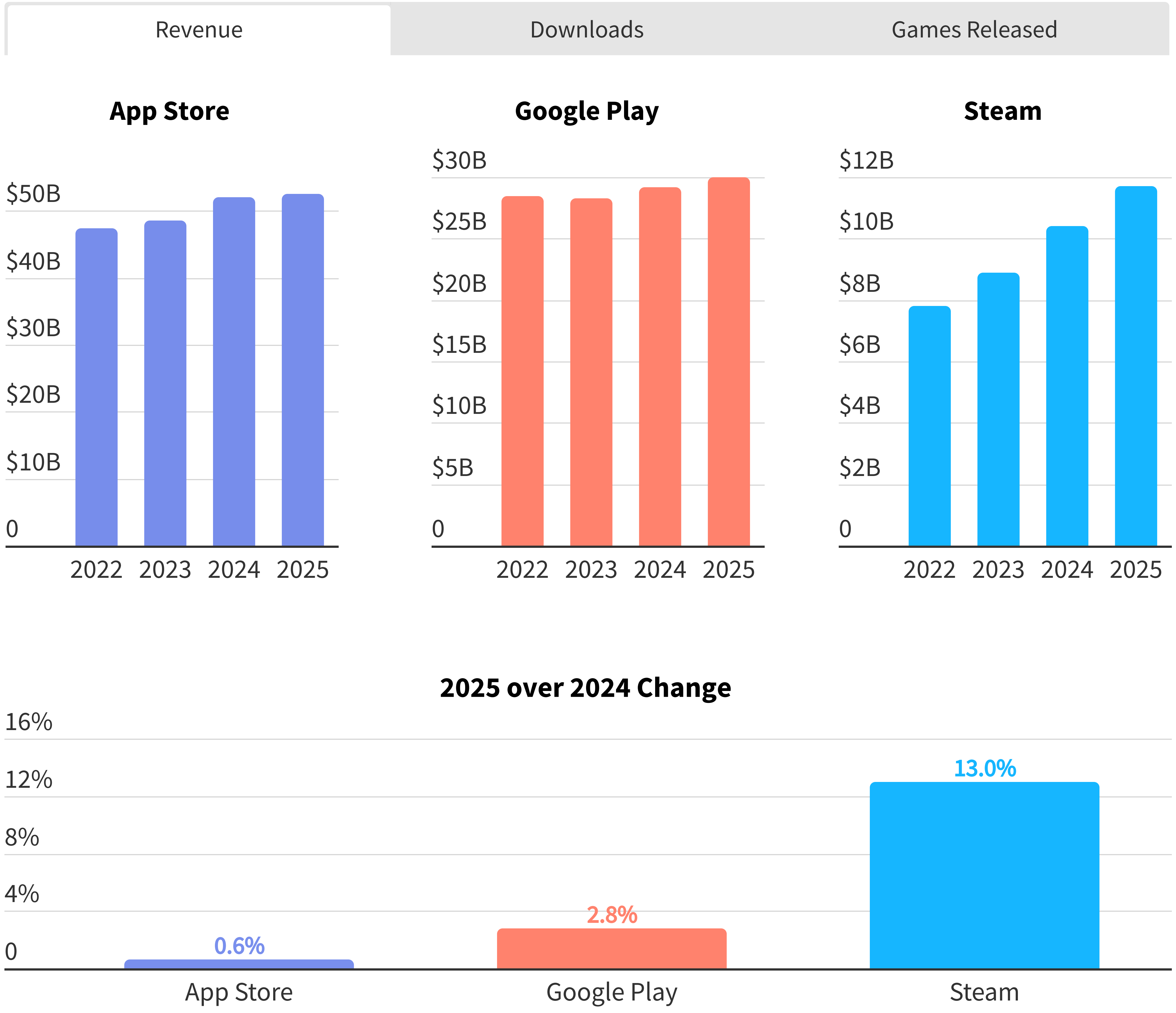
Mobile growth was subtler. App Store IAP revenue was flat and Google Play posted modest gains, while downloads continued to decline on both platforms. Notably, Google Play's IAP revenue growth coincided with a steeper download decline than iOS.

Supply continues to rise as development gets easier, including through AI-enabled tooling. On Android, Google Play materially reduced store inventory as part of a quality and policy crackdown, with total app count down about 47% from the start of 2024 to early 2025, but the number of games released rebounded sharply in 2025 as developers adapted.

Want to Dive Deeper or See Back Further?
Sensor Tower customers can check out the Market Size tool for mobile and the Steam Market Data tool for PC to break down by category and see further back.

Source: Sensor Tower Mobile App Insights, Video Game Insights
Note: . App Store and Google Play revenue are IAP; Steam revenue is premium game purchase.. IAP revenue is gross — inclusive of any percent taken by the app stores. Games on mobile classified using Sensor Tower's Game IQ taxonomy.

Annual Worldwide Gaming Trends



Market Overview

Strategy Won Mobile in 2025; Action Won PC.

Strategy and puzzle led mobile growth in 2025, with strategy IAP revenue up 20% and puzzle up 14%. Strategy was the only genre to see a downloads increase. On PC, action drove the biggest gains, with premium revenue on Steam up 32%.

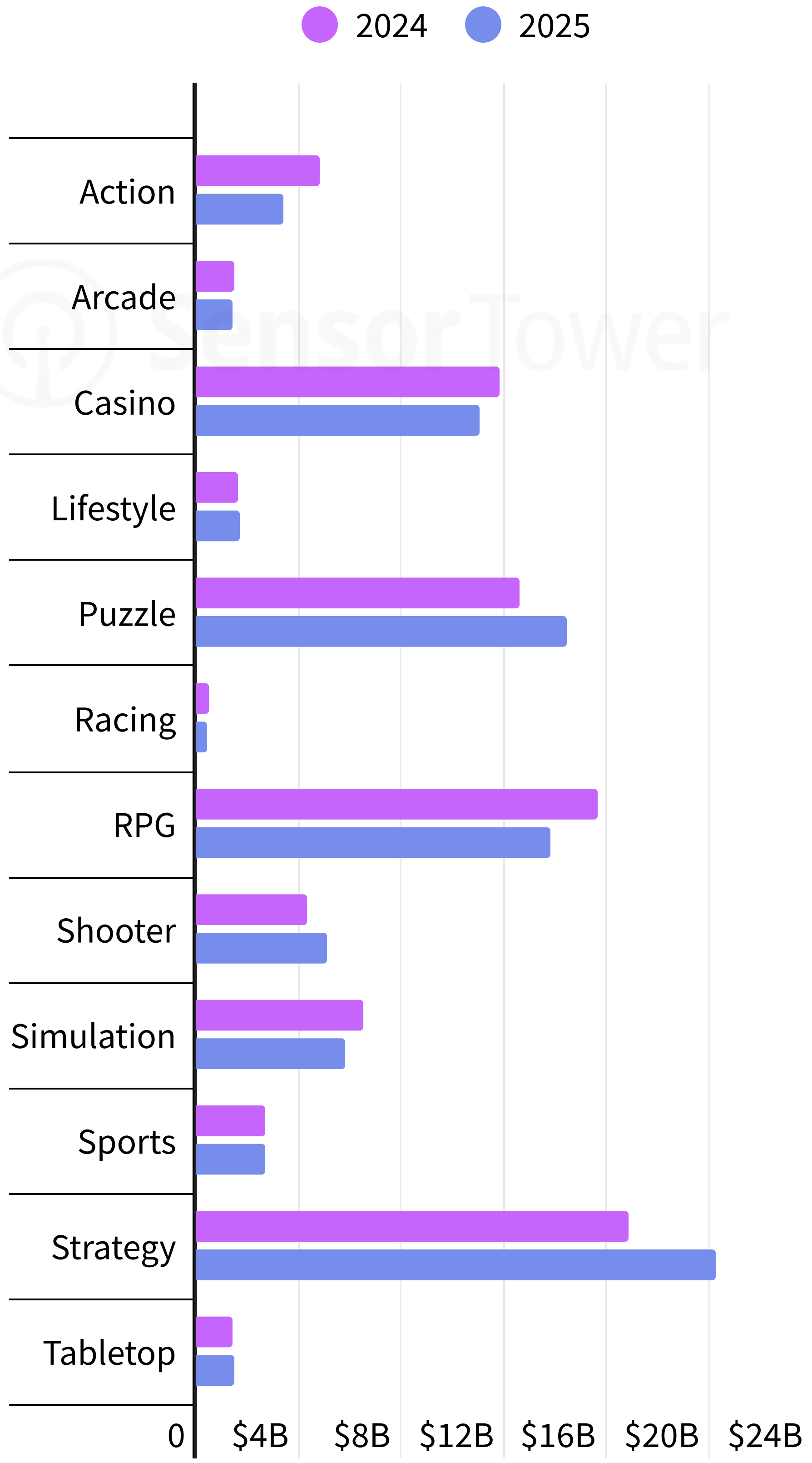
On mobile, strategy growth came from a wave of 4X titles from Eastern developers, led by Last War: Survival and Whiteout Survival. Kingshot was the fastest growing IAP revenue game, followed by Delta Force. On the casual side, Gossip Harbor saw huge growth followed by Royal Kingdom.

On PC, action was fueled by chaotic co-op hits like R.E.P.O. and Peak, extending the momentum sparked by Lethal Company. Shooters also surged, led by Battlefield 6, the year's top-selling PC/Console title. Despite several high-profile launches, including Battlefield 6, Marvel Rivals, and Delta Force, PC/Console shooter downloads did not increase, suggesting new titles mostly captured share from incumbents rather than expanding the category.

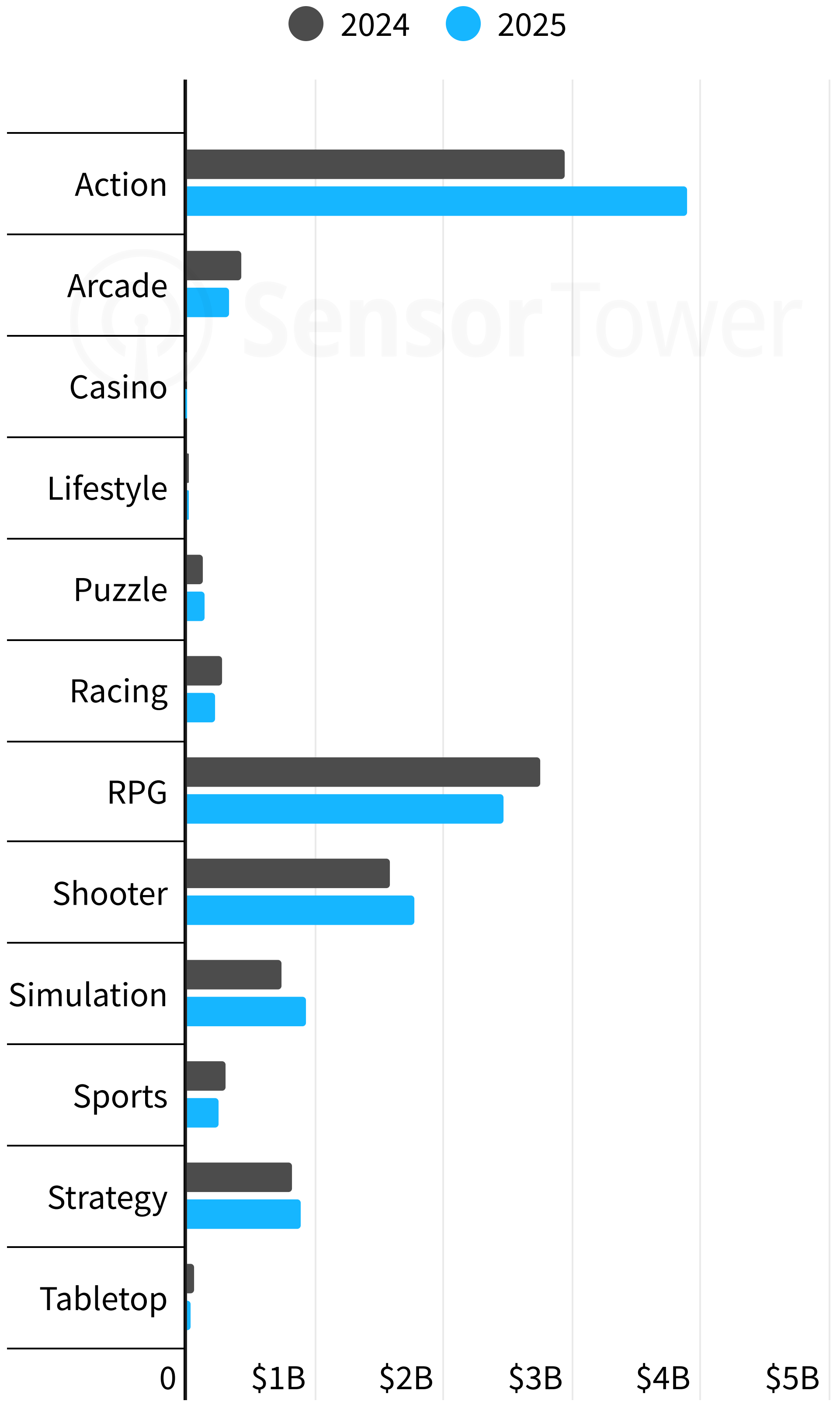
Surface Cross-Platform Trends
Sensor Tower's Game IQ taxonomy is unified across mobile and PC/Console. Sensor Tower customers can see what the top games are in any category with Top Apps for mobile and Top Charts for PC/Console.

Revenue | Downloads

Mobile Genre Trends 2025 over 2024



Steam Genre Trends 2025 over 2024



Source: Sensor Tower Mobile App Insights, Custom Data
Note: Games classified using Sensor Tower's unified taxonomy. Mobile revenue is IAP; Steam revenue is premium game purchase.. IAP revenue is gross — inclusive of any percent taken by the app stores. Steam 'Adventure' genre excluded and mobile genre 'Geolocation' excluded to align taxonomies

Market Overview

Mobile Trends YouTube, PC/Console Trends Meta

The majority of mobile game ad spend continues to flow to mobile app networks like AppLovin and AdMob, while PC/Console spend is more concentrated in social and video channels, with YouTube capturing the largest share.

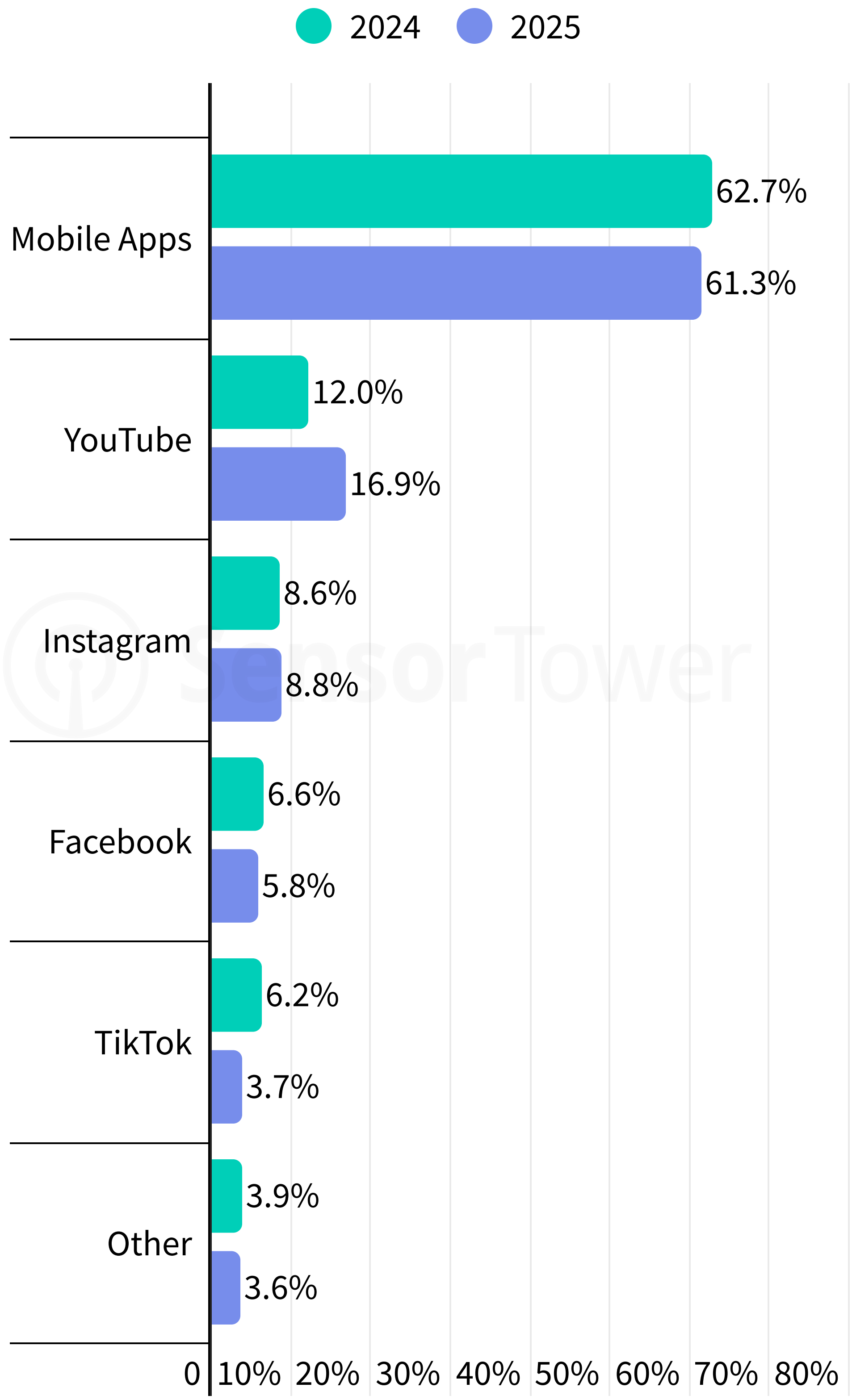
YouTube's share increased year-over-year for mobile games, aligning with the broader shift toward monetization, retention, and targeting high-value audiences over maximizing download volume. By contrast, YouTube's share declined for PC/Console, though it remains the category's top channel by spend. Instagram gained significant PC/Console share. Short-form video placements and targeting are a strong fit for trailer-style creative and efficient retargeting of high-intent players.

Award Winning Marketing Intelligence
Sensor Tower Pathmatics helps marketers make smarter decisions. Download competitors' strategies, from channel mix to creative strategy and more.

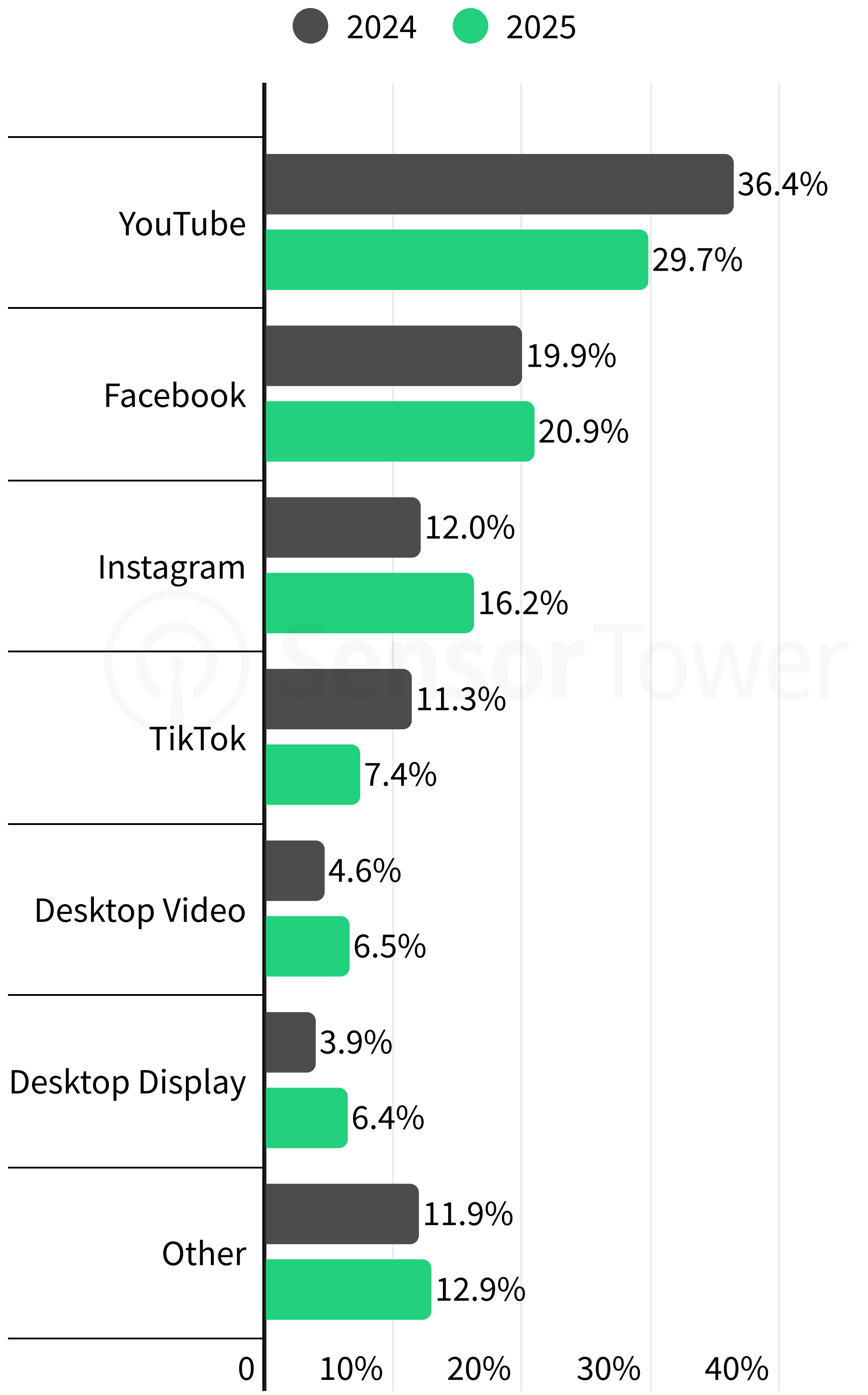
Source: Sensor Tower Pathmatis
Note: Worldwide include 29 markets. Channels available per market vary.

Worldwide

Mobile Game Ad Spend Share Trends



PC/Console Game Ad Spend Share Trends



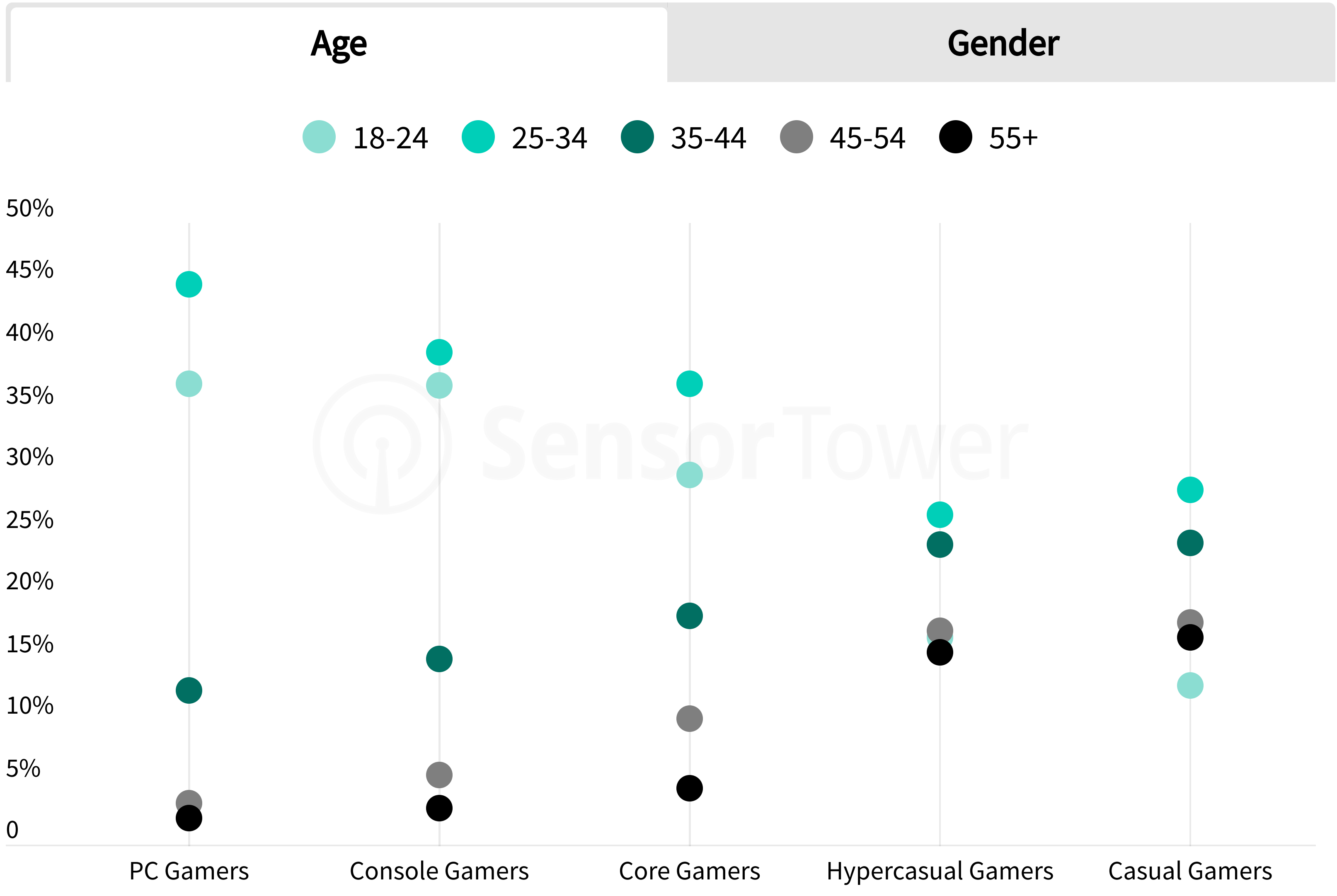
PC Gamers Skew Younger, Hypercasual Skews Female

PC and Console audiences skew youngest, with more than 75% of players under age 35. By contrast, Casual and Hypercasual audiences skew older, with nearly 60% of players age 35 and above. Gender representation also varies sharply by persona: higher-intensity segments such as Console and Core skew male, while Casual and Hypercasual audiences skew female.

Explore Your Audience
Analyze audience demographics and behavior by app, category, persona, and more with Sensor Tower Audience Insights.

Source: Sensor Tower Audience Insights
Note: Among Android users in the United States. Includes YouTube and excludes other pre-installed apps. Demographics by app genre include the top 25 apps for each genre by average MAU in the United States.

Demographic Breakdown Across Gaming Personas
United States in 2025



Top Apps by Share of Audience Using App
United States in 2025

	Casual Gamers	Core Gamers	Hypercasual Gamers	Console Gamers	PC Gamers
1	Pokémon GO	Roblox	Block Blast!	PlayStation App	Roblox
2	NYT Games	Clash Royale	Solitaire Associations Journey	Xbox	PlayStation App
3	Pokémon Sleep	Brawl Stars	Roblox	Roblox	Pokémon TCG Pocket
4	Pokémon TCG Pocket	Block Blast!	NYT Games	Block Blast!	Xbox
5	Royal Match	Minecraft	Pixel Flow!	Clash Royale	NYT Games
6	Happy Color	Pokémon TCG Pocket	Color Blaze Shooter	Pokémon TCG Pocket	Clash Royale
7	MONOPOLY GO!	Clash of Clans	Jigsolitaire	Pokémon GO	Chess
8	Township	Geometry Dash	Happy Color	Minecraft	Pokémon GO
9	Roblox	Pokémon GO	Foodie Sizzle	Meta Horizon	Block Blast!

Mobile Remains the Main Source of Reach for IPs

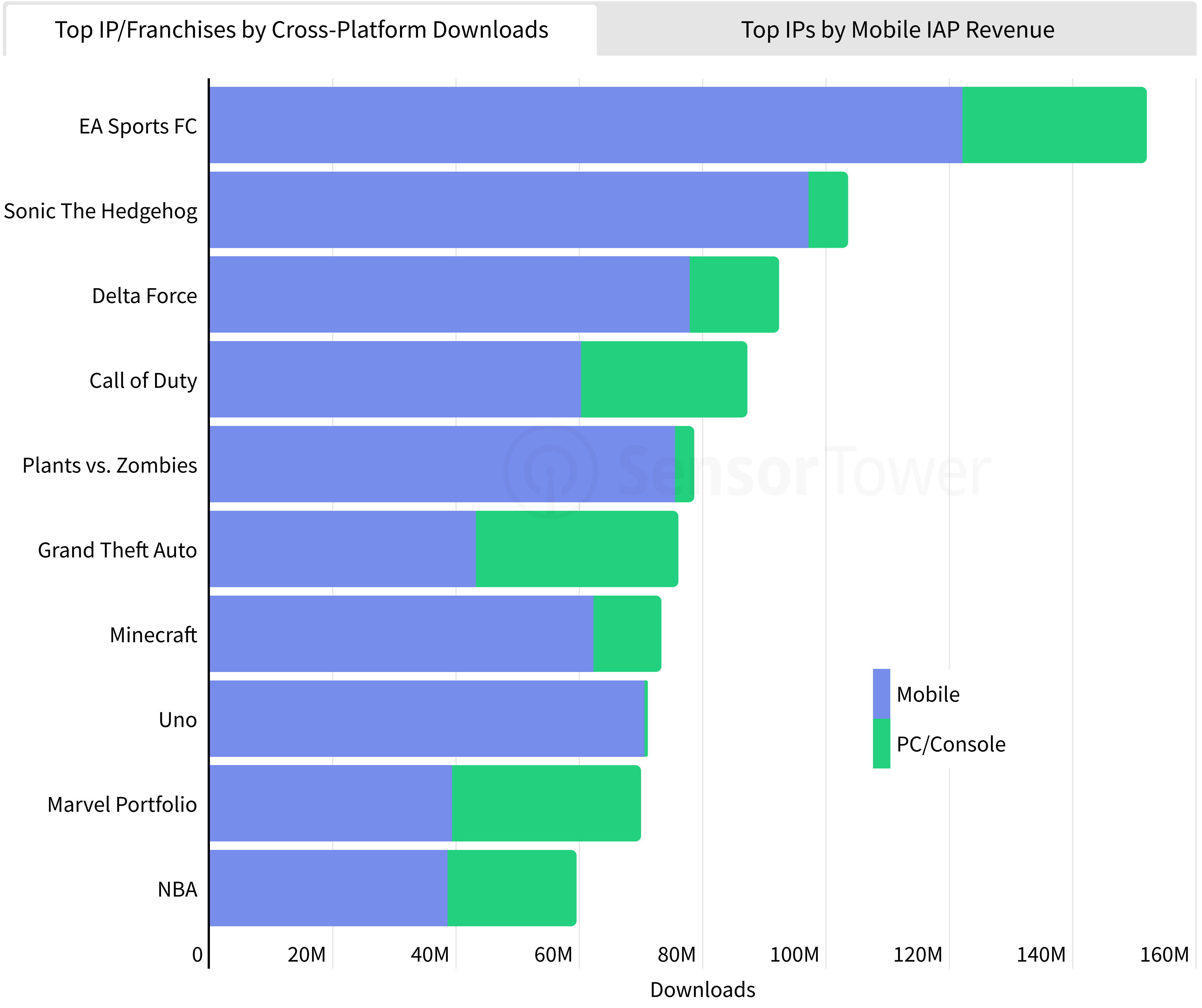
Mobile remains the lowest-friction way to reach audiences at scale, thanks to the size of the smartphone user base and free-to-play distribution. PC and console are growing, but premium pricing and hardware requirements still raise the entry barrier versus mobile.

By cross-platform downloads, the top IPs are mostly game-native, with notable exceptions like Marvel and the NBA (and arguably EA Sports FC as a sports IP). That mix suggests room for more non-game IPs to expand reach through mobile-first executions.

By mobile game revenue, the leaderboard looks different, reflecting IPs that monetize more effectively on mobile even without leading on 2025 downloads. MONOPOLY GO! was a major driver, making MONOPOLY the top IP by mobile IAP revenue.

Source: Sensor Tower Mobile App Insights, Video Game Insights
Note: Mobile downloads are iOS and Google Play combined. iOS only for China.

Top Intellectual Properties (IP) in Mobile Gaming Worldwide 2025



Roblox is in Its Own Category, EA Sports FC #2

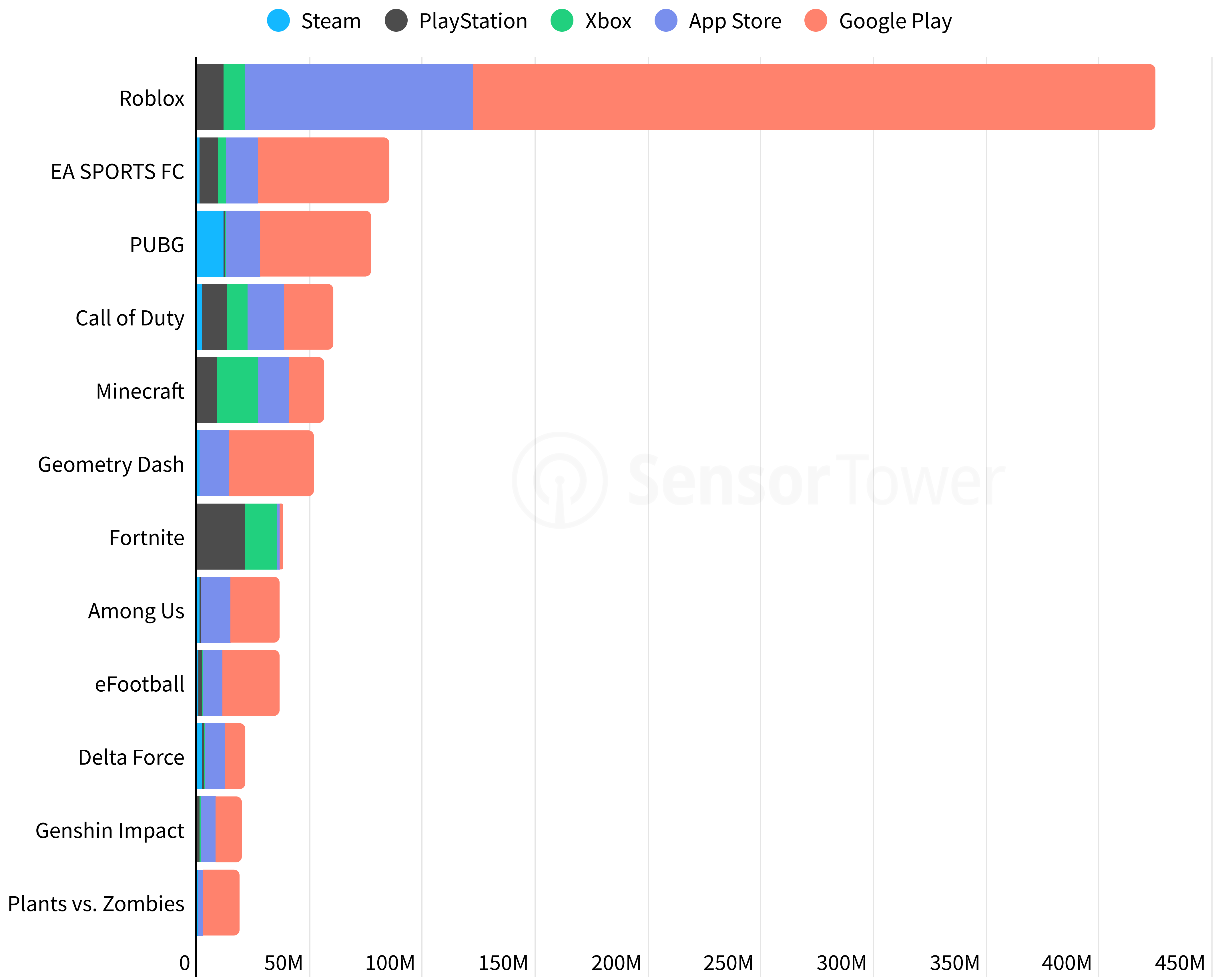
Roblox has by far the largest cross-platform player base, reinforcing its position as a platform as much as a game. While it also has a meaningful PC/Console footprint, most of its audience comes from mobile. Focusing on PC/Console, Fortnite, Minecraft, and Call of Duty stand out for their large cross-platform audiences.

Some rankings are especially notable given a premium model on PC/Console. EA SPORTS FC and Call of Duty rank #2 and #4 overall despite being $70 AAA franchises on PC/Console. Minecraft and Geometry Dash are the only top-ranked titles with a meaningful premium footprint on mobile.

A key strategic distinction is how closely the mobile experience matches PC/Console. Replicating a AAA experience on mobile is often impractical or less compelling than building a tailored brand extension, as EA SPORTS FC and Call of Duty have done. Cross-platform-first products such as Roblox and Minecraft benefit from delivering a more consistent experience across devices.

Source: Sensor Tower Mobile App Insights, Video Game Insights
Note: Regional and Country do not include Xbox. Fortnite is not on Steam; Counterstrike is only on Steam.

Top Cross Platform Games by Average 2025 MAU



Note: One game on PC/Console was added to one game on mobile for each title (ex. EA SPORTS FC 25 + EA SPORTS FC Mobile, EA SPORTS FC 26 was not included).

State of Gaming 2026

Embracer #1 by Cross-Platform Downloads, EA #2

Embracer Group (see note for specifics) saw the most cross-platform downloads of the year, driven by a hypercasual mobile heavy portfolio. Electronic Arts was #2 overall, and led all publishers on PC/Console downloads, followed by Take-Two Interactive overall.

EA had a strong year on PC/Console, with Battlefield 6, EA SPORTS FC 25, and EA SPORTS FC 26 as the top three best-selling AAA games of the year. Take-Two's top titles by units sold included Grand Theft Auto V Enhanced, NBA 2K25, NBA 2K26, and Red Dead Redemption 2, underscoring the durable pull of blockbuster franchises and acclaimed AAA releases. GTA V first launched in 2013, while Red Dead Redemption 2 launched in 2018.

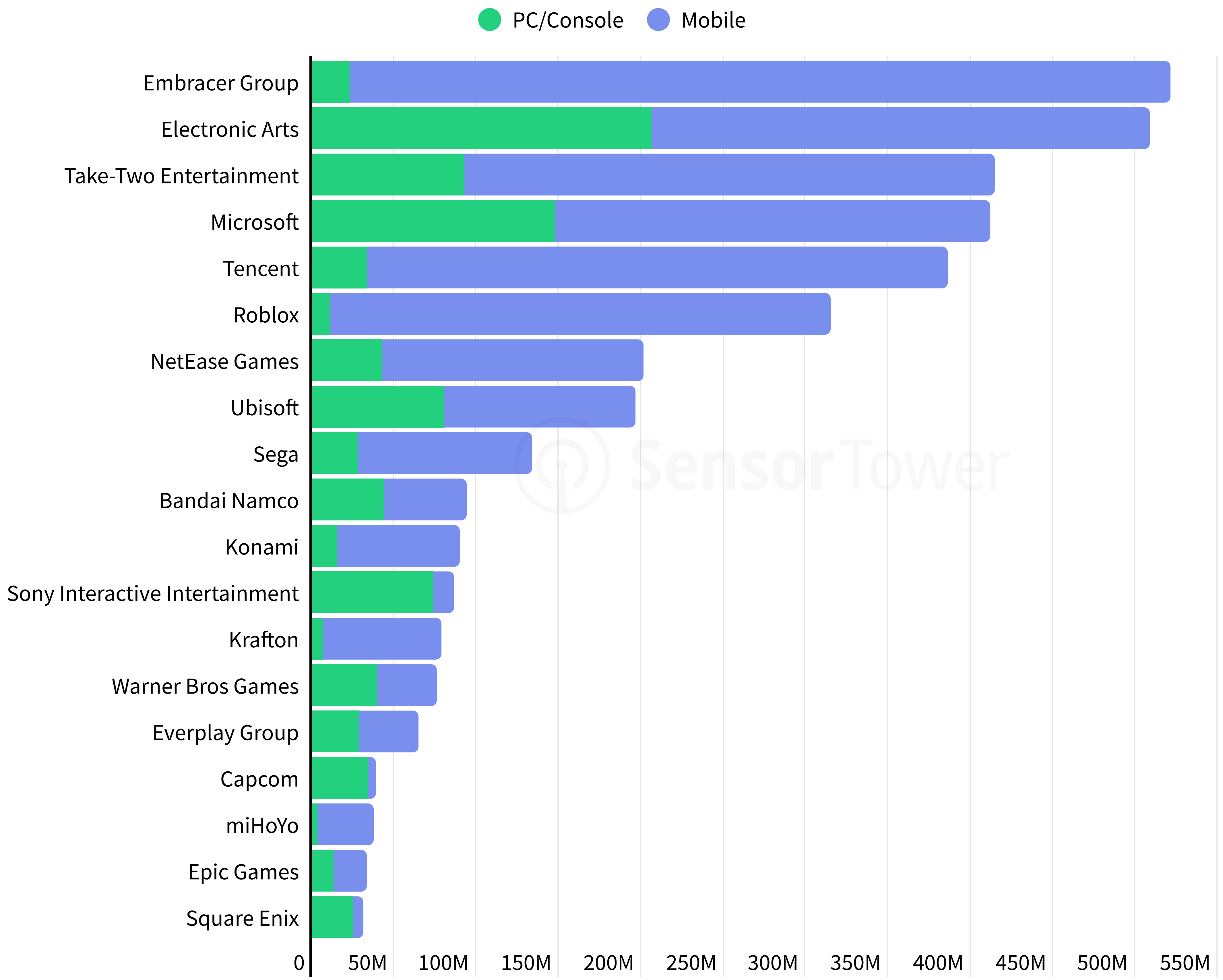
Eastern, mobile-heavy publishers Tencent and NetEase ranked #5 and #7, respectively. Both skew midcore, with Tencent's top performers including PUBG MOBILE and Honor of Kings, and NetEase led by Blood Strike and Eggy Party.

Tencent here does not include Supercell or Miniclip.com. If all three were to be summed, Tencent would be #1 by cross-platform downloads by a huge margin.

Source: Sensor Tower Mobile App Insights, Video Game Insights
Note: Only publishers with >3 million downloads on both Mobile and PC/Console shown. Embracer Group download totals include only divisions that are expected to be part of Fellowship Entertainment. Mobile downloads are iOS and Google Play combined. iOS only for China.

Top Cross-Platform Publishers by Downloads

2025 Worldwide, Steam, PlayStation, Xbox, App Store, Google Play



Market Overview

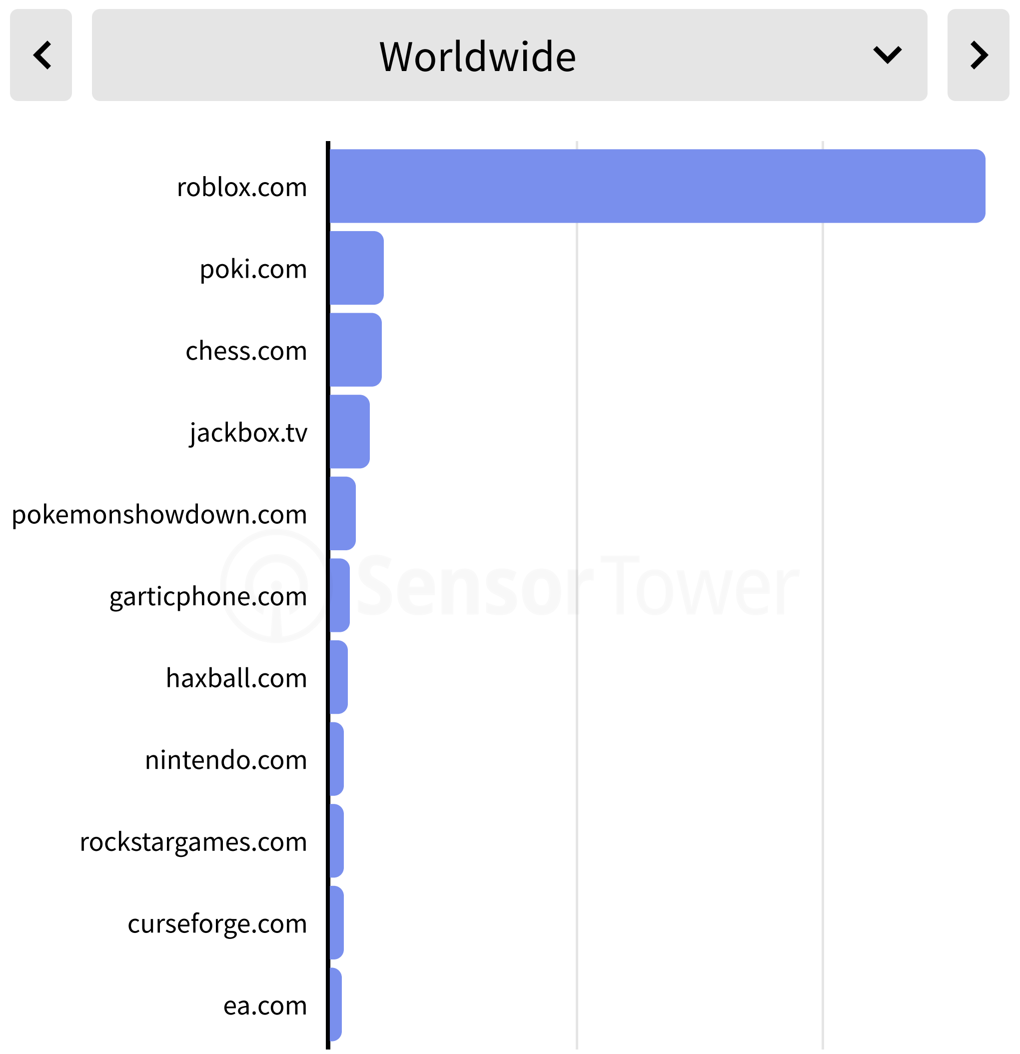
Roblox Rivalled by Steam and Supercell in Webstore Visits

Roblox has a massive web footprint, with its huge playerbase using web as an extension of the game to browse experiences and make purchases. Only other destinations with browser gaming like poki.com, chess.com, and jackbox.tv come anywhere close. Looking at webstores, Roblox is still #1, but Steam comes in as the #1 PC/Console webstore, and Supercell comes in as the #1 pure mobile webstore.

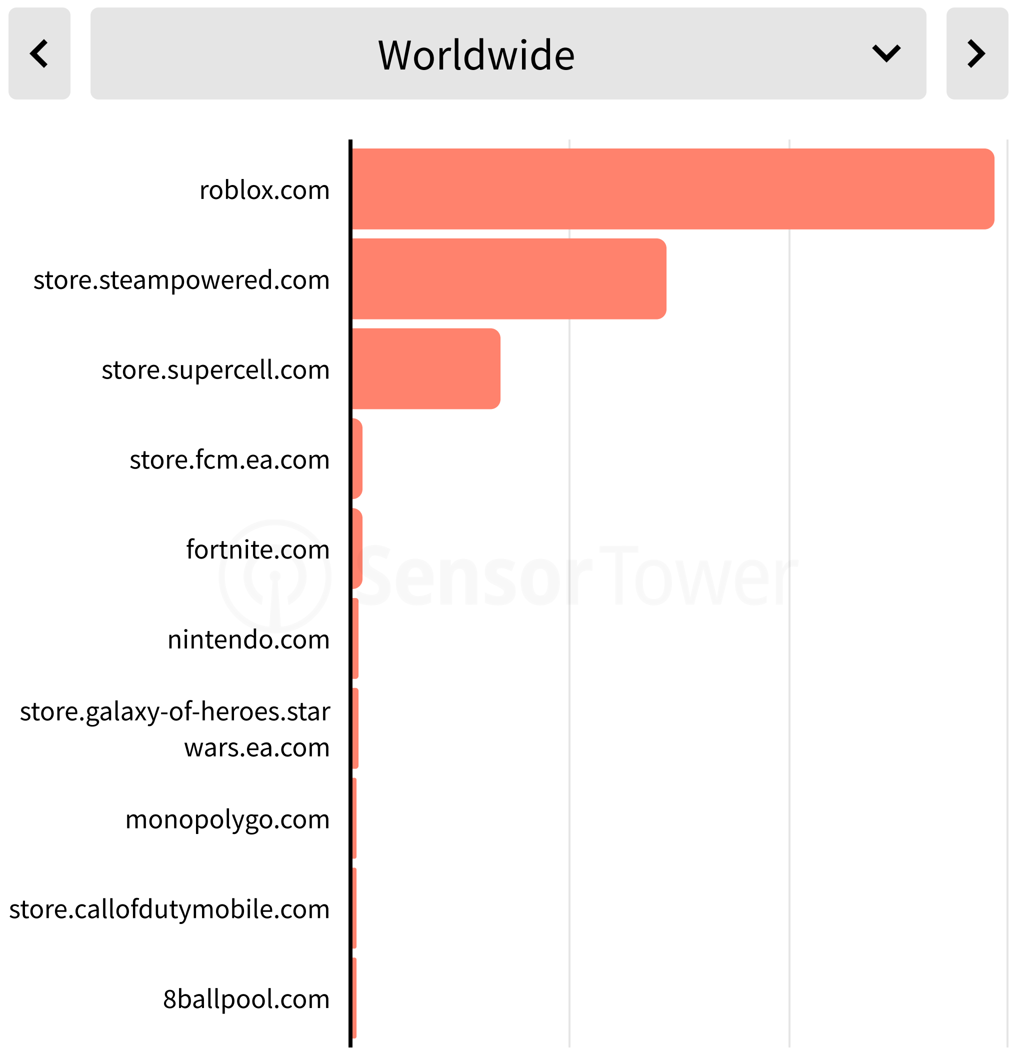
Benchmark Your Web Presence
Sensor Tower Web Insights allows you to understand the channels driving website traffic, how users behave on site, and what drives performance across the web.

Source: Sensor Tower Web Insights
Note: Worldwide includes 56 markets.

Top Gaming Websites
by Visits 2025

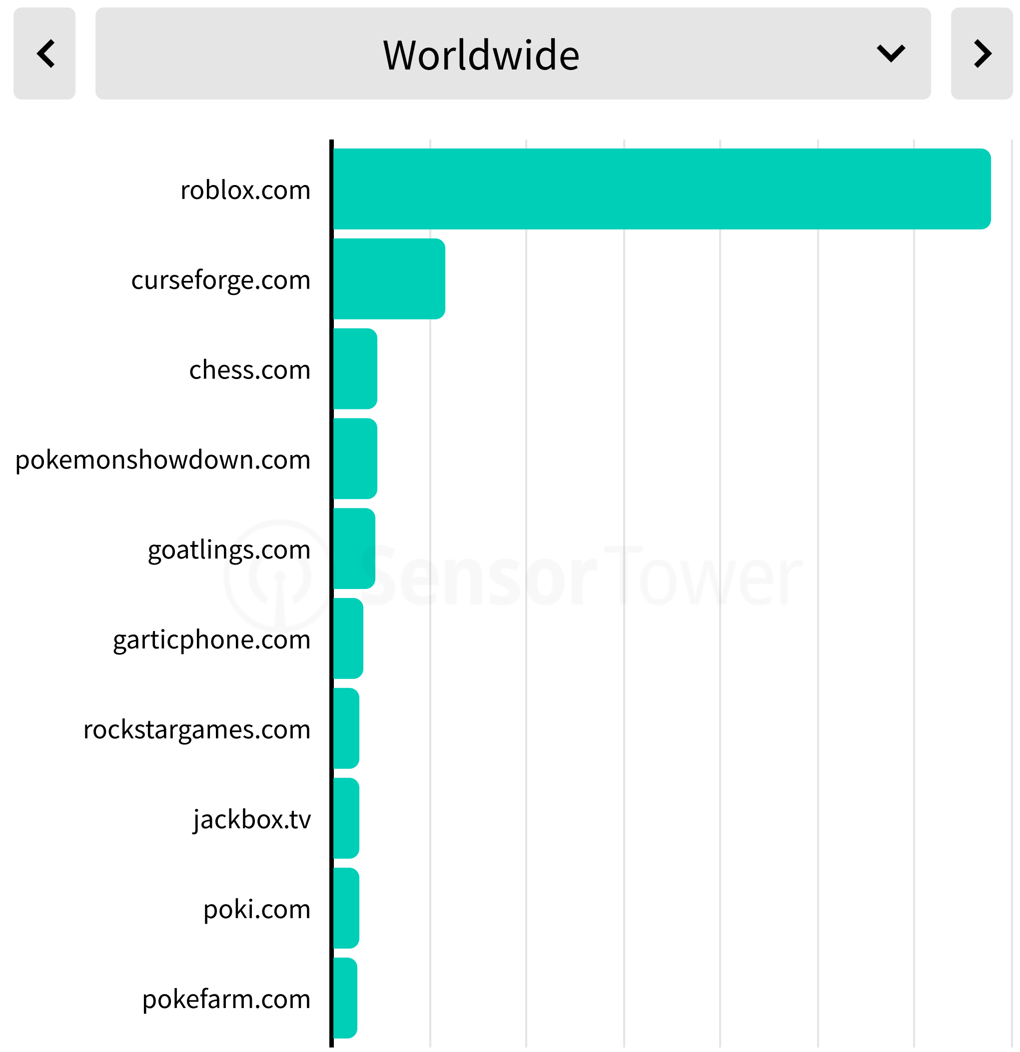


Top Gaming Webstores
by Visits 2025



Note: Webstores defined as domains and paths in the Gaming category that contain a list of store related terms like 'store' and 'catalog', filtering non 1st party webstores.

Top Gaming Websites
by Gen AI Sourced Visits 2025



02

Mobile Market

2025 was a year of divergence in mobile gaming: revenue held up but downloads and total time spent fell, highlighting rising competition for players’ attention and the importance of live ops and deep monetization.

"In a rapidly changing mobile ecosystem, sustained success comes from constant learning and thoughtful iteration. At Scopely, our ‘learning machine’ culture enables us to turn data into insight and insight into action across our global portfolio. Sensor Tower helps power that system by providing the market intelligence we rely on to anticipate change and build games that endure."

Josh Solis
VP, Strategic Insights
Scopely

Mobile Game Revenue Rose 1% Despite Downloads Fall

2025 marked a third straight year of revenue growth across the App Store and Google Play. Time spent rose slightly even as downloads fell, pointing to a market shifting from new-user volume to lifetime value expansion.

IAP revenue growth skewed toward Europe, while the US was flat. Revenue is reported in US dollars (USD), so exchange rate moves may influence regional comparisons, for example in parts of East Asia.

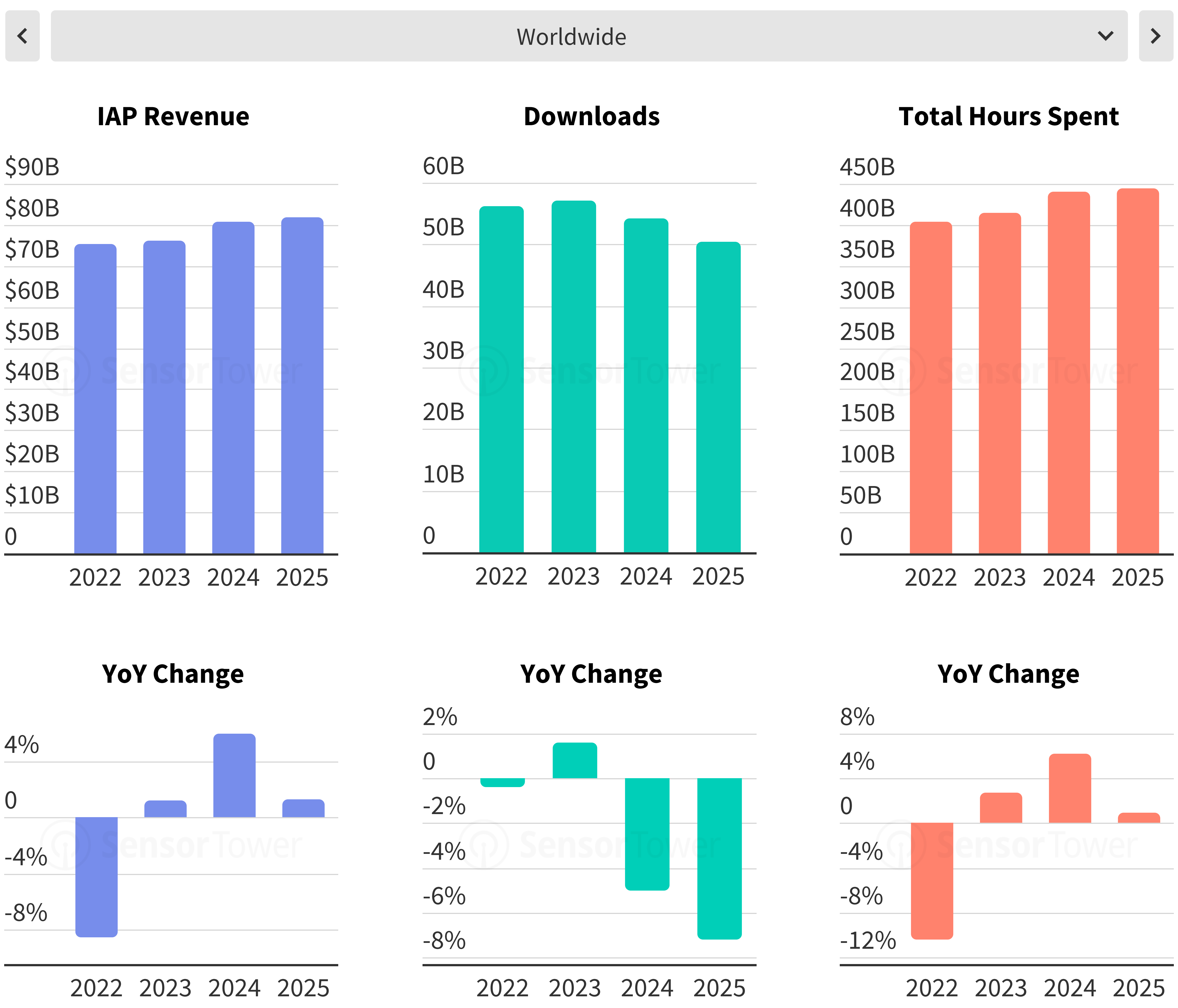
Engagement diverged by market: time spent rebounded in the US and Japan after 2024 declines, while China Mainland fell. Within Europe, the UK strengthened while France was flat and Germany softened.

With installs down, growth depends less on adding users and more on expanding lifetime value from the existing base. Teams should prioritize retention and reactivation, tighter payer management, and user acquisition disciplined by payback and conversion, not volume.

The Industry Standard
Better decisions depend on better intelligence. Sensor Tower helps teams operate with confidence through trusted market data.

Source: Sensor Tower Mobile App Insights
Note: iOS and Google Play combined. iOS only for China. Revenue is gross — inclusive of any percent taken by the app stores. Games classified using Sensor Tower's taxonomy as of January 2026.

Annual Trends for Mobile Games



Mobile Market

Hybridcasual Grew Revenue While Hypercasual Expanded Engagement

Hybridcasual was the standout monetization gainer in 2025, with revenue up sharply while Casual and Mid-core were essentially flat. Downloads declined across Casual, Mid-core, and Hybridcasual, while Hypercasual was the only model to post download growth.

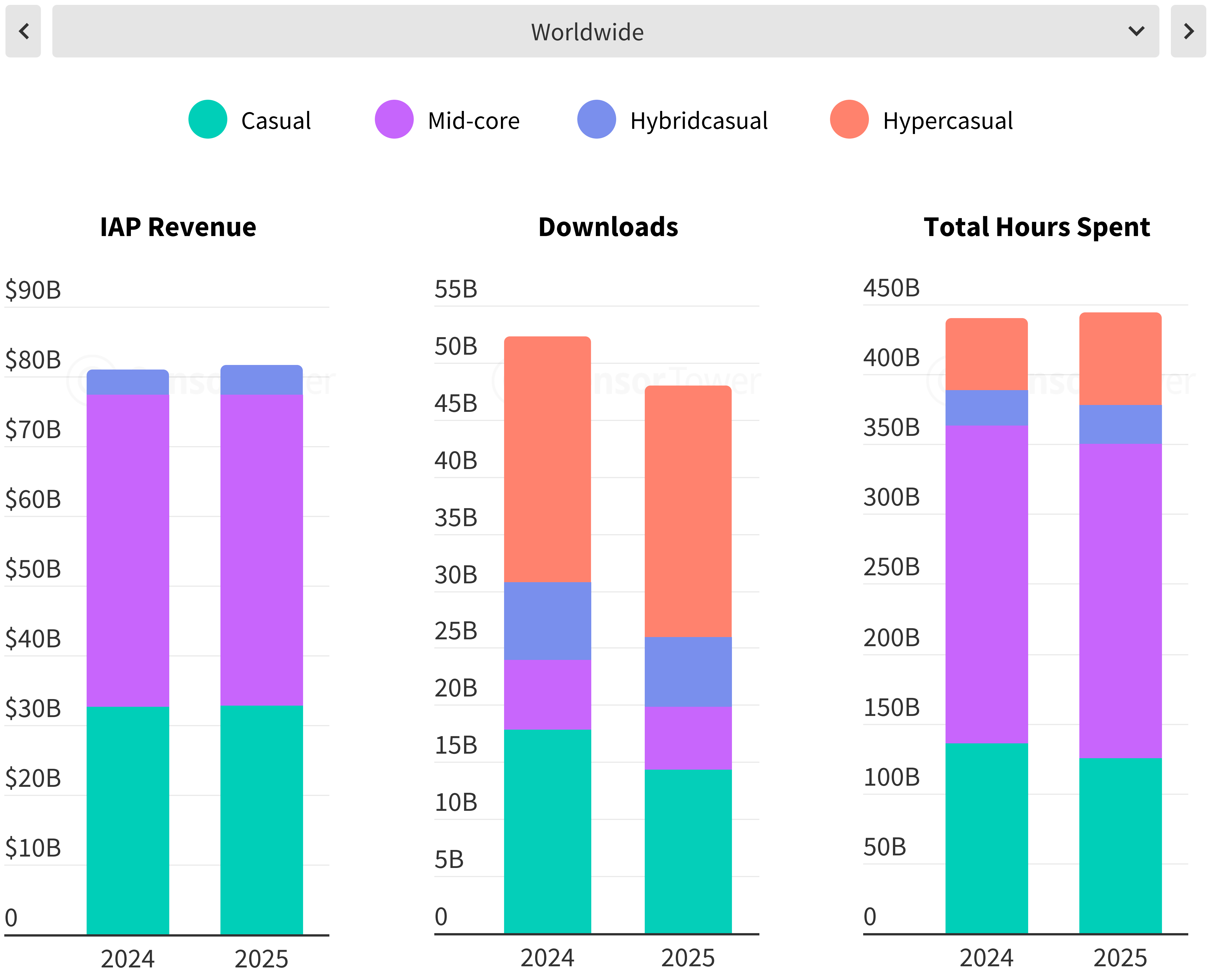
Attention shifted even more than installs. Hypercasual time spent surged, and the lift was not limited to Tier 2 markets, with engagement also rising across major markets like the US, Japan, and Western Europe. The key question for non-hypercasual teams is what hypercasual's breakout winners, including Block Blast! and Mahjong Vita, reveal about hooks, session loops, and creative concepts that scale attention.

The top IAP revenue leaders remain casual and mid-core. For publishers outside that top tier, hybridcasual is the most direct way to ride the monetization trend, but its 2025 gains also raise the bar on monetization per hour as attention tightens.

Quickly Identify Breakout Performers
Identify the fastest-growing games within any product model and validate momentum early using Sensor Tower. Request a demo here.

Source: Sensor Tower Mobile App Insights
Note: iOS and Google Play combined. iOS only for China. Revenue is gross — inclusive of any percent taken by the app stores. Games classified using Sensor Tower's taxonomy as of January 2026.

Annual Trends for Mobile Games by Product Model



Strategy Won Mobile 2025

Strategy drove the biggest 2025 revenue gains across major regions, powered by a surge of 4X Strategy hits from Eastern publishers, led by Last War: Survival and Whiteout Survival. Puzzle posted strong gains, especially in Europe, with Royal Match reaching the top spot and Gossip Harbor delivering the largest uplift. Shooters grew in Asia on the back of new launches, led by Delta Force.

Strategy was the only genre to grow downloads across Asia, North America, and Europe, reinforcing its momentum across key metrics. All other genres saw downloads declines across major regions, especially Lifestyle, Simulation, and Puzzle.

Total hours spent increased overall, but the engagement mix diverged by genre and region. Simulation growth in Asia was driven primarily by Roblox's expansion, while Strategy hours spent rose in Europe and North America led by Clash Royale but declined in Asia as players shifted time away from MOBAs.

See The Latest Trends
Track what's growing by quarter, month, or week with Sensor Tower's Market Size product here.

Year-over-Year Change for Mobile Games in 2025
by Genre and Region

IAP Revenue | Downloads | Time Spent (Years)

Region	Action	RPG	Shooter	Strategy	Casino	Arcade	Geolocation	Lifestyle	Puzzle	Simulation	Tabletop	Racing	Sports
Asia	-$768M	-$1.53B	$584M	$1.38B	-$99M	-$181M	-$116M	-$21M	$321M	-$44M	$34M	-$48M	-$55M
North America	-$223M	-$129M	$175M	$1.12B	-$860M	$88M	-$34M	$35M	$604M	-$641M	$16M	-$13M	-$12M
Europe	-$342M	-$75M	$27M	$629M	$140M	$23M	$14M	$18M	$706M	-$1M	$77M	-$3M	$37M
Latin America	-$47M	-$9M	$42M	$84M	-$5M	-$2M	$5M	$2M	$73M	$10M	$5M	$0M	$13M
Oceania	-$8M	-$10M	-$4M	$67M	-$2M	$2M	$0M	$3M	$40M	-$26M	$2M	-$1M	$1M
Middle East	-$26M	-$10M	$2M	$58M	-$2M	$1M	$1M	$4M	$34M	-$20M	$16M	$0M	$3M
Africa	-$2M	-$9M	-$1M	$1M	-$4M	$1M	$0M	$1M	$14M	$5M	$1M	$0M	-$1M

Source: Sensor Tower Mobile App Insights
Note: iOS and Google Play combined. iOS only for China. Revenue is gross — inclusive of any percent taken by the app stores. Games classified using Sensor Tower's taxonomy as of January 2026.

Casual Has a Retention Problem

The top casual games saw day 7 (D7) retention steadily decline from early 2022 through late 2025. Over the same period, hybridcasual improved its relative performance and now sits above casual on D7, with other retention windows showing a similar softening for casual.

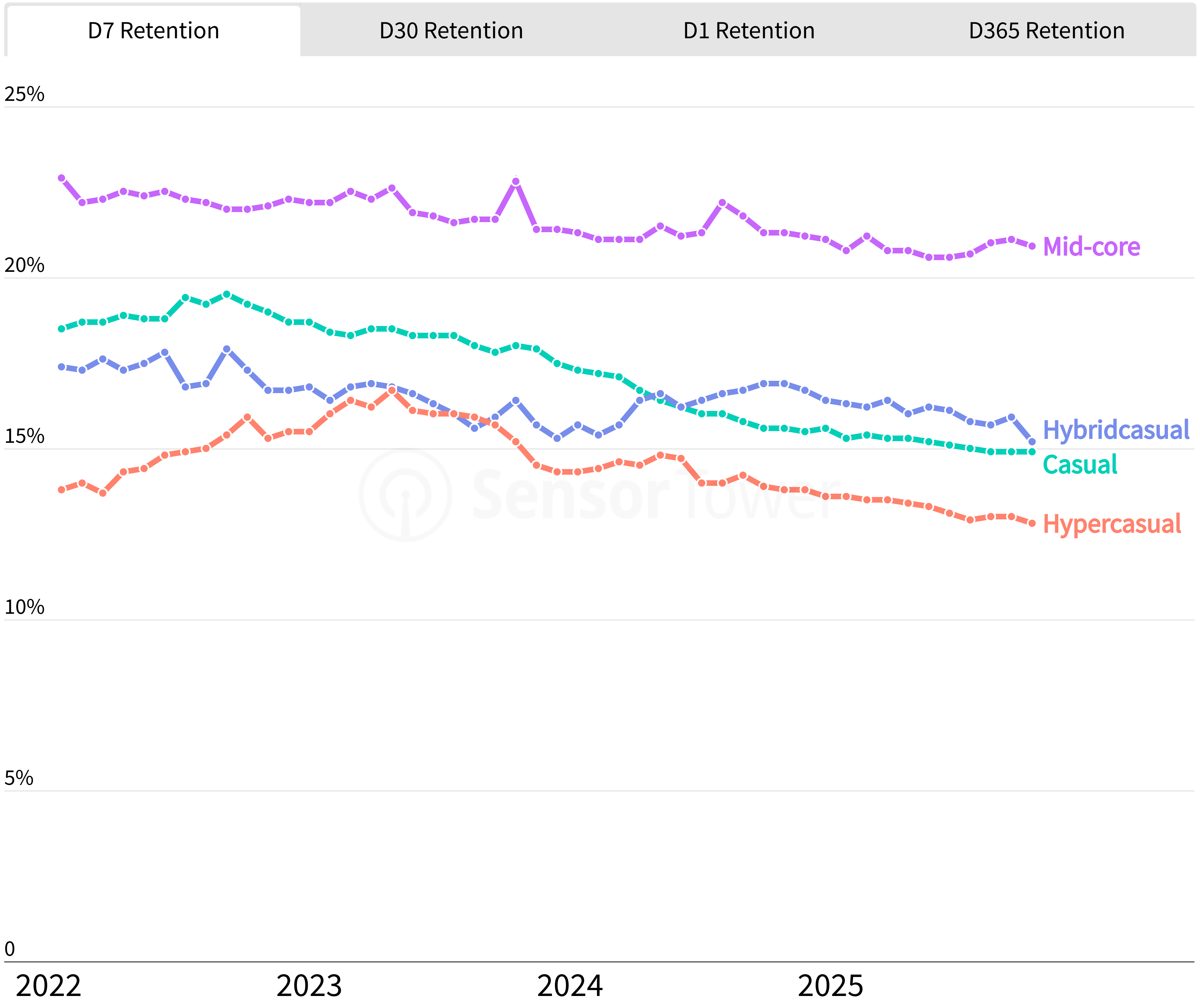
This drop is more concentrated in casual than in other product models, suggesting a model-specific stickiness headwind rather than a uniform market shift. The pattern may reflect content fatigue, audience mix changes, or maturity in long-running casual portfolios.

Not every casual title is slipping. Century Games' Tasty Travels remains a standout, with D7 retention at 22% today, showing that strong early stickiness is still achievable in casual.

How Do You Stack Up?
Benchmark your retention against competitors with Sensor Tower's revamped Retention Report and spot where drop-offs are happening by day.

Source: Sensor Tower Mobile App Insights
Note: iOS and Google Play combined. iOS only for China. Games classified using Sensor Tower's taxonomy as of January 2026.

Mobile Game Retention Trends by Product Model
Top 25 Games by 2025 IAP Revenue per Product Model (by Downloads for Hypercasual)



Mobile Market

Eastern Publishers Gained Share In 2025 As Century Games Broke Out

Eastern publishers increased their share in 2025, driven by outsized growth from Century Games and FUNFLY among others, while North America declined and European publishers saw modest gains, led by Dream.

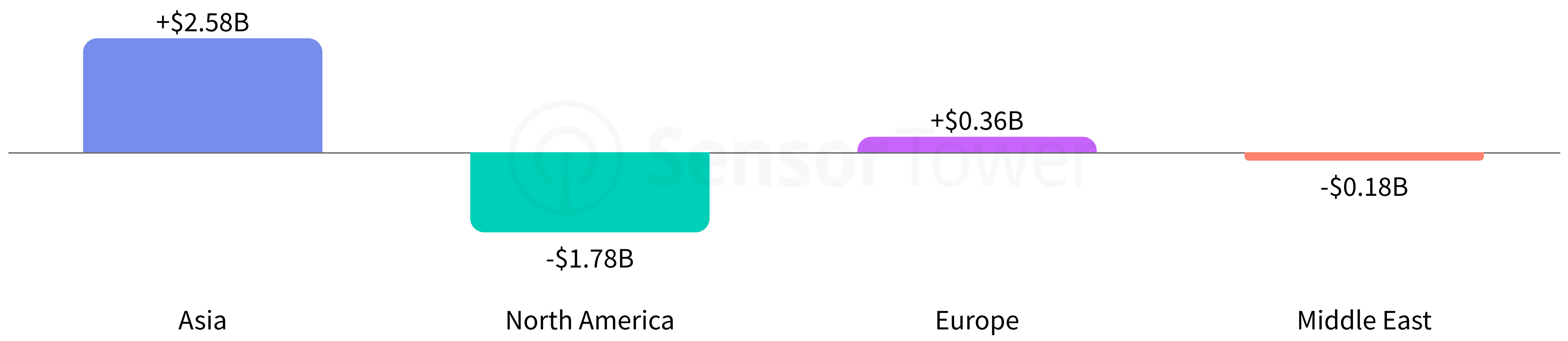
Tencent held the #1 spot in 2025 IAP revenue, even with Supercell and Miniclip broken out separately. Century Games was the standout mover, climbing into the top tier and peaking at #2 late in the year, while FUNFLY also pushed into the top ten on the strength of Last War: Survival, the year's top IAP title.

As user acquisition gets more expensive, advantage can shift toward publishers that monetize deeply and efficiently from a stable base. Eastern publishers' experience in monetization-forward models may be an edge as growth depends less on volume and more on value capture.

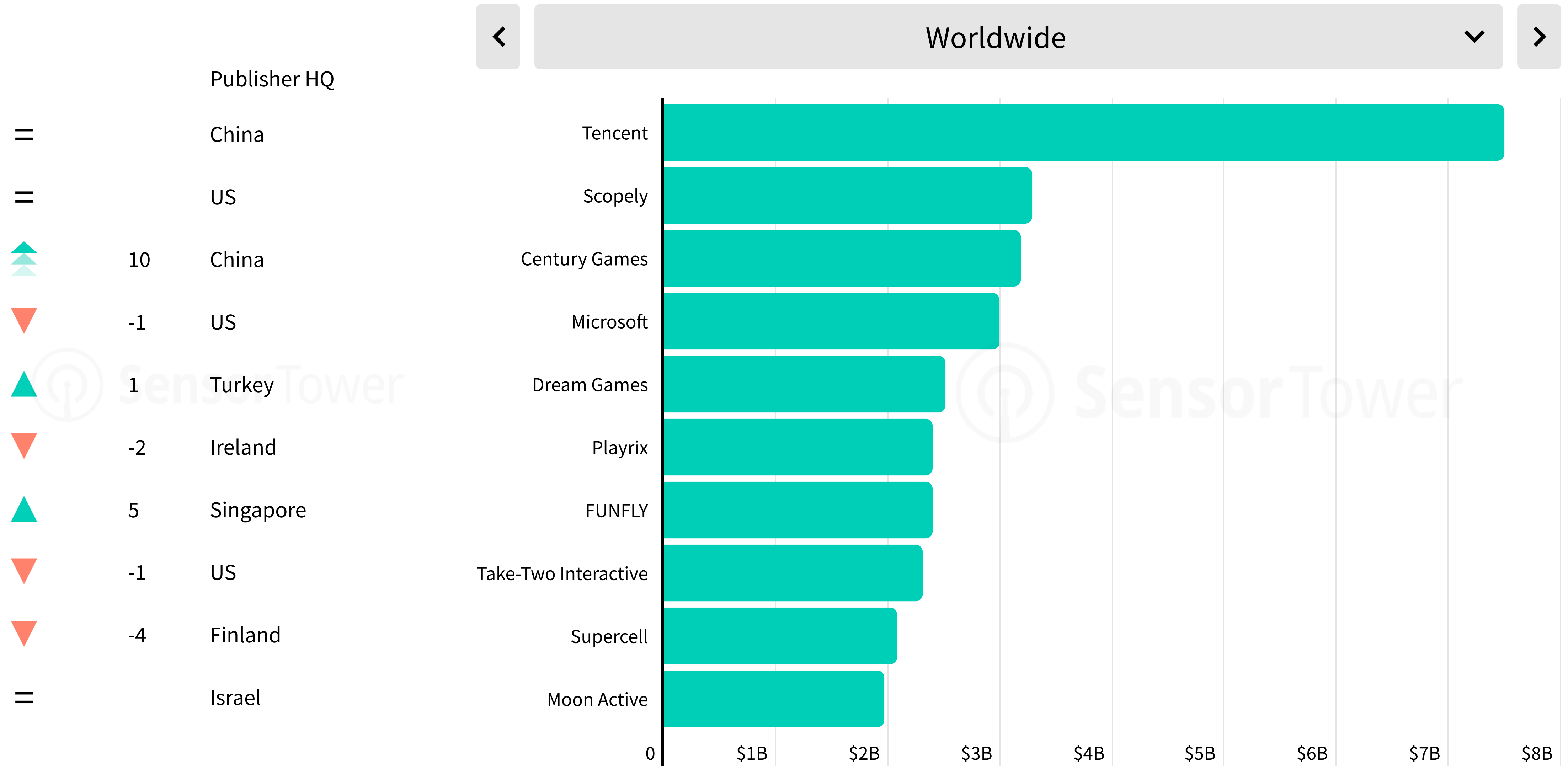
Who Is On Top Now?
Leaderboards shift constantly. Sensor Tower customers can see who is winning today in Mobile App Insights: Top Publishers.

Source: Sensor Tower Mobile App Insights
Note: iOS and Google Play combined. iOS only for China. Revenue is gross — inclusive of any percent taken by the app stores.

In-App Purchase Revenue 2025 over 2024 Change by Publisher HQ Region



Top 10 Mobile Game Publishers by 2025 In-App Purchase Revenue



State of Gaming 2026

Mobile Market

Lifestyle/Puzzle Leads Hybridcasual Ad-Mon

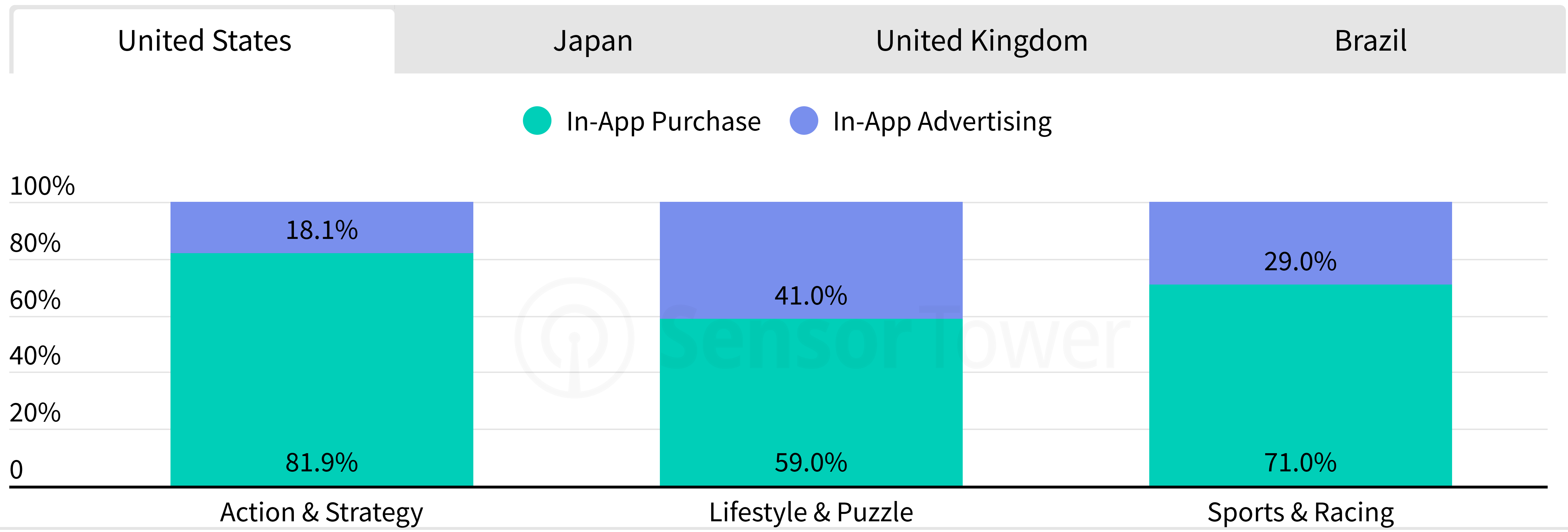
Across four major markets, Hybridcasual Lifestyle & Puzzle games generated a higher share of revenue from in-app advertising than Hybridcasual Action & Strategy and Sports & Racing games. They also produced significantly higher in-app advertising revenue per download than the other two classes, while Action & Strategy delivered significantly higher store revenue per download than Lifestyle & Puzzle or Sports & Racing.

By format, rewarded video remains the cornerstone of in-app advertising revenue in mobile gaming, with most networks generating half or more of ad revenue from rewarded placements. Interstitials are a close second, and on Mintegral, Unity, and Digital Turbine, interstitials generated more revenue than rewarded ads. Native ads were a distant third, while banners contributed relatively little in this context. As downloads contract and each install must generate more value, high-visibility placements have become even more important to advertisers.

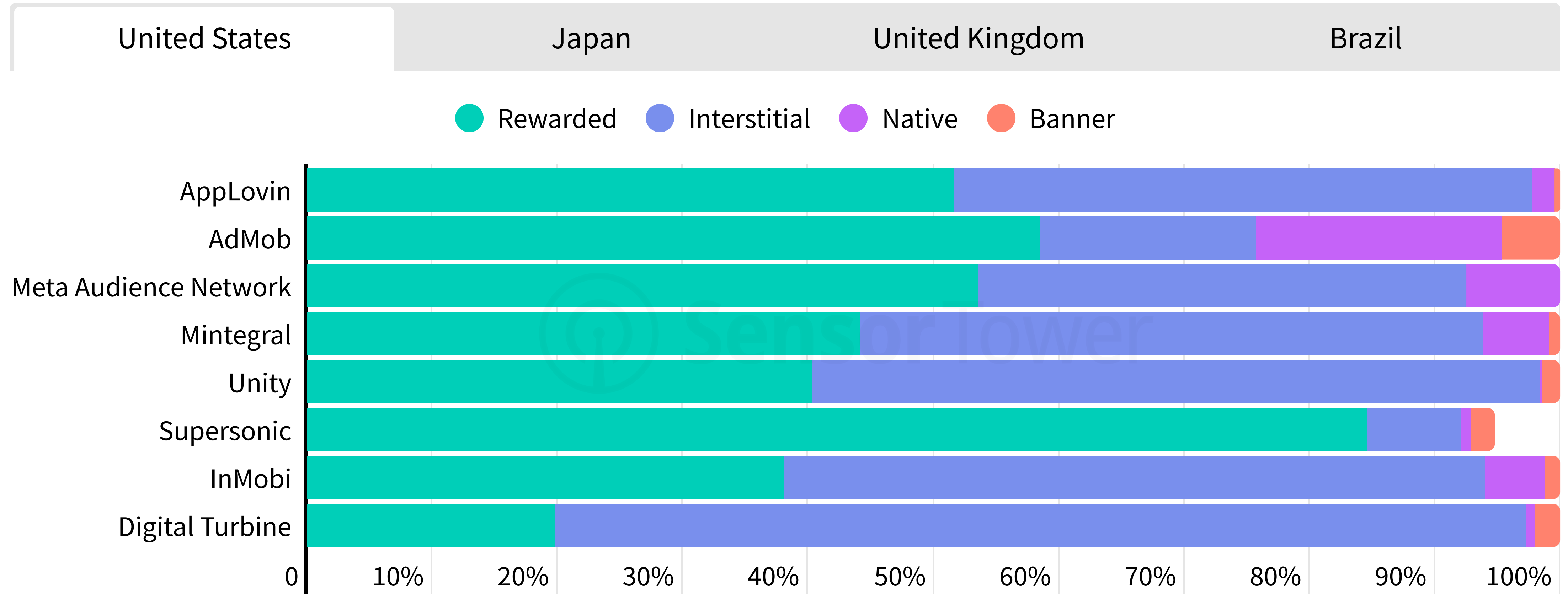
Coming Soon: Ad Monetization
Reach out to be considered for our Early Access Program.

Source: Sensor Tower App Advertising Insights
Note: Custom dataset not yet avilable to customers.

Hybridcasual In-App Purchase vs In-App Advertising Revenue Share
Top 1,000 games by downloads per genre, country



In-App Ad Revenue Share by Format per Network
Top 1,000 games by downloads per genre, country



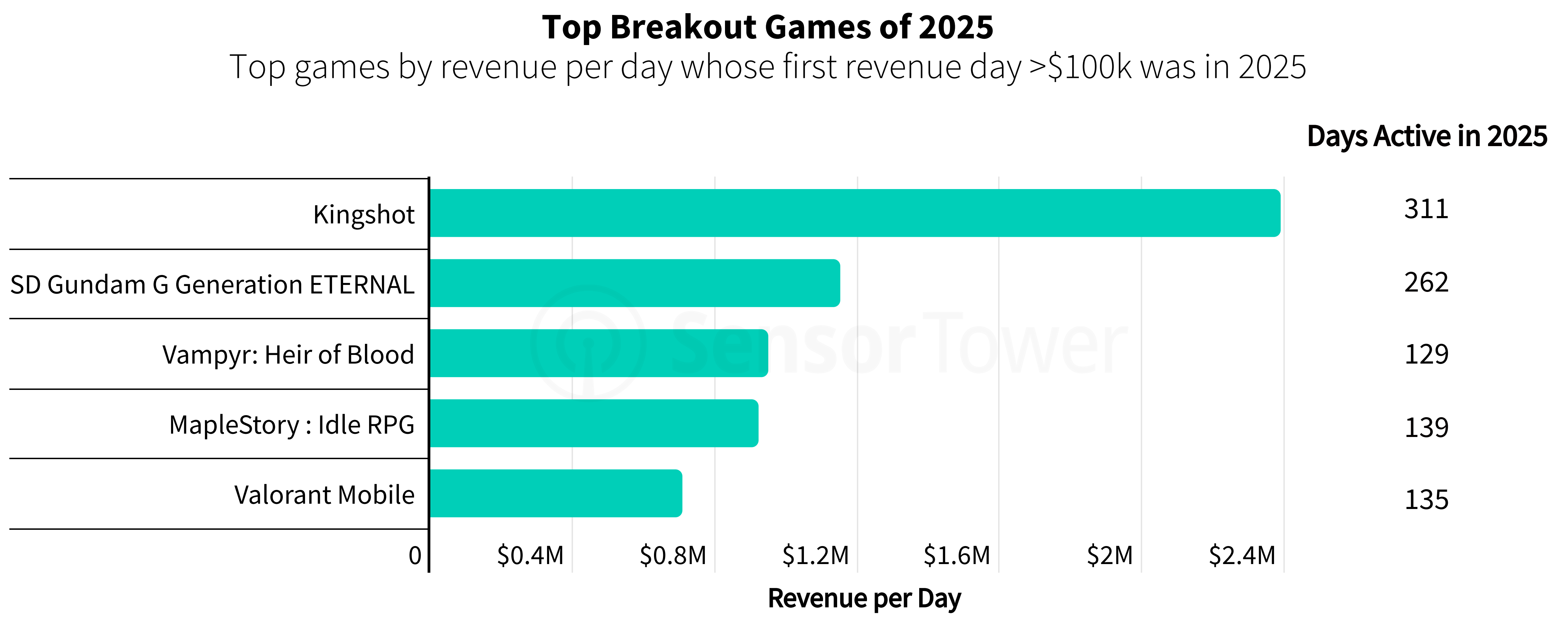
Action & Strategy Dominated 2025 Breakouts

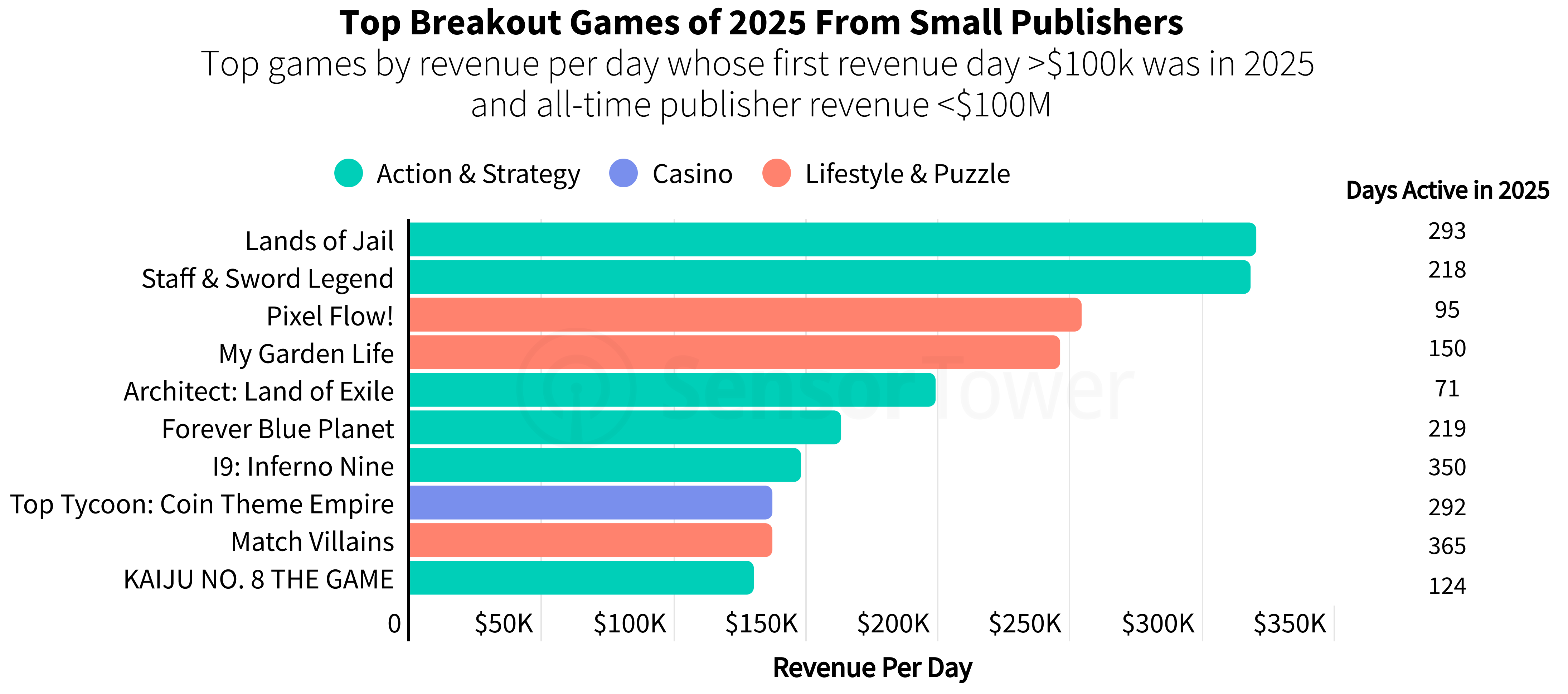
All five of the top breakout games of 2025 were in the Action & Strategy class. Here, breakout games are defined as the top titles by revenue per day whose first day above $100K in revenue occurred in 2025, which filters out soft launches and normalizes for launch timing across the year.

The breakout game of the year was Century Games' Kingshot, which rose to the #7 mobile game by IAP revenue by December 2025. SD Gundam G Generations ranked #2 overall and was concentrated in Japan, followed by Netmarble's Vampyr: Heir of Blood and MapleStory: Idle RPG, both of which gained traction in Korea. Valorant Mobile launched in China and became the #6 shooter in the market by IAP revenue in December 2025.

Among breakout games from small publishers, Lands of Jail put a fresh spin on the Eastern 4X strategy wave that surged this year. Pixel Flow! is a sorting game that casual developers should watch: it has grown rapidly since launch and ranked #20 among mobile games by IAP revenue in the US in January 2026. Pixel Flow was acquired by Scopely on 2/19/26.

Source: Sensor Tower Mobile App Insights
Note:iOS and Google Play combined. iOS only for China. Revenue is gross — inclusive of any percent taken by the app stores.





Tencent is the #1 IP Parent by Mobile Game Revenue

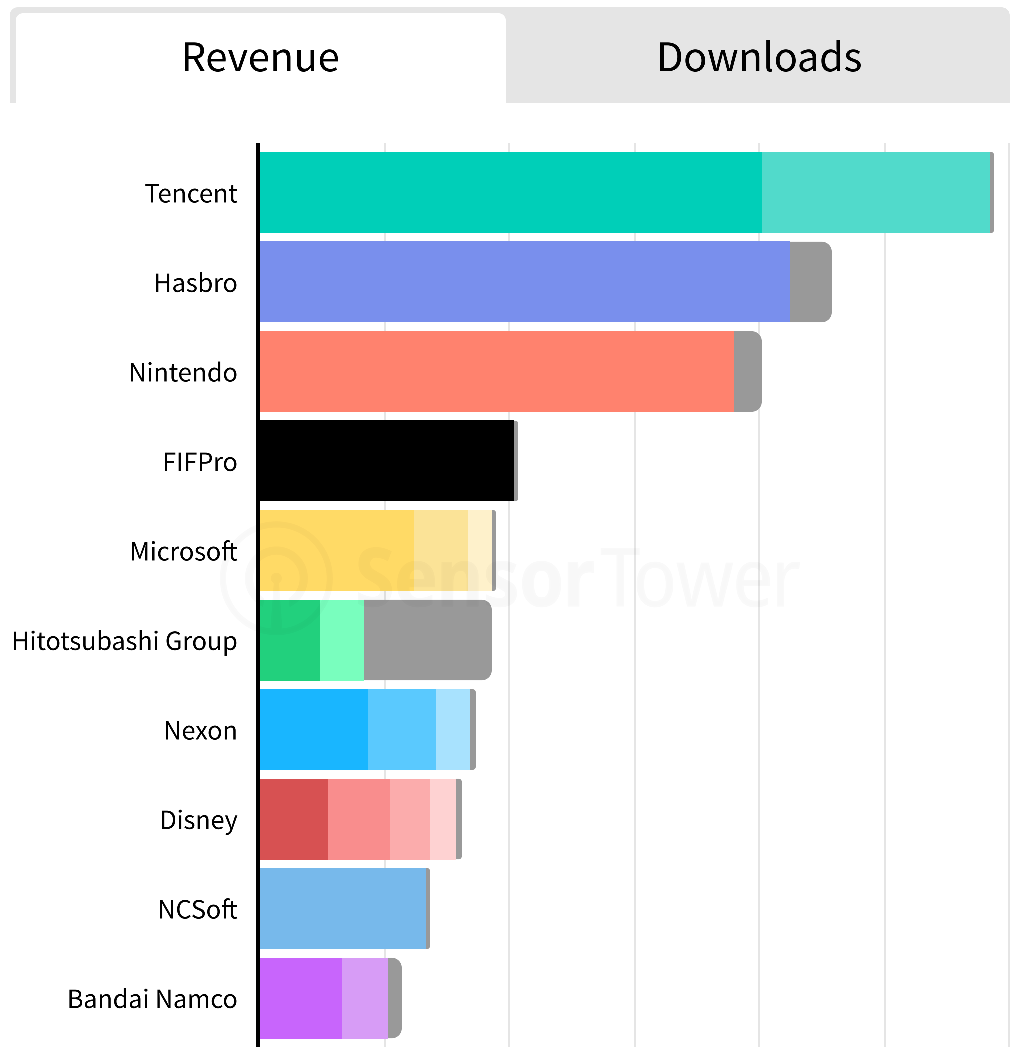
Tencent is the #1 corporate parent for video game IP on mobile by IAP revenue, led by Honor of Kings and League of Legends (Teamfight Tactics and Wild Rift). Hasbro is the top non-gaming corporate parent, and Monopoly is the top IP by mobile game IAP revenue, driven by MONOPOLY GO! alone. Nintendo and Pokémon rank #3 among corporate parents and IPs, respectively, driven by Pokémon GO and Pokémon TCG Pocket. Video game IP continues to dominate the mobile game IP landscape, followed by Anime/Manga, Board Games, Sports, and Animated TV, with rankings varying depending on whether the metric is revenue or downloads.

Game IQ Tags Can Do More Than You Think

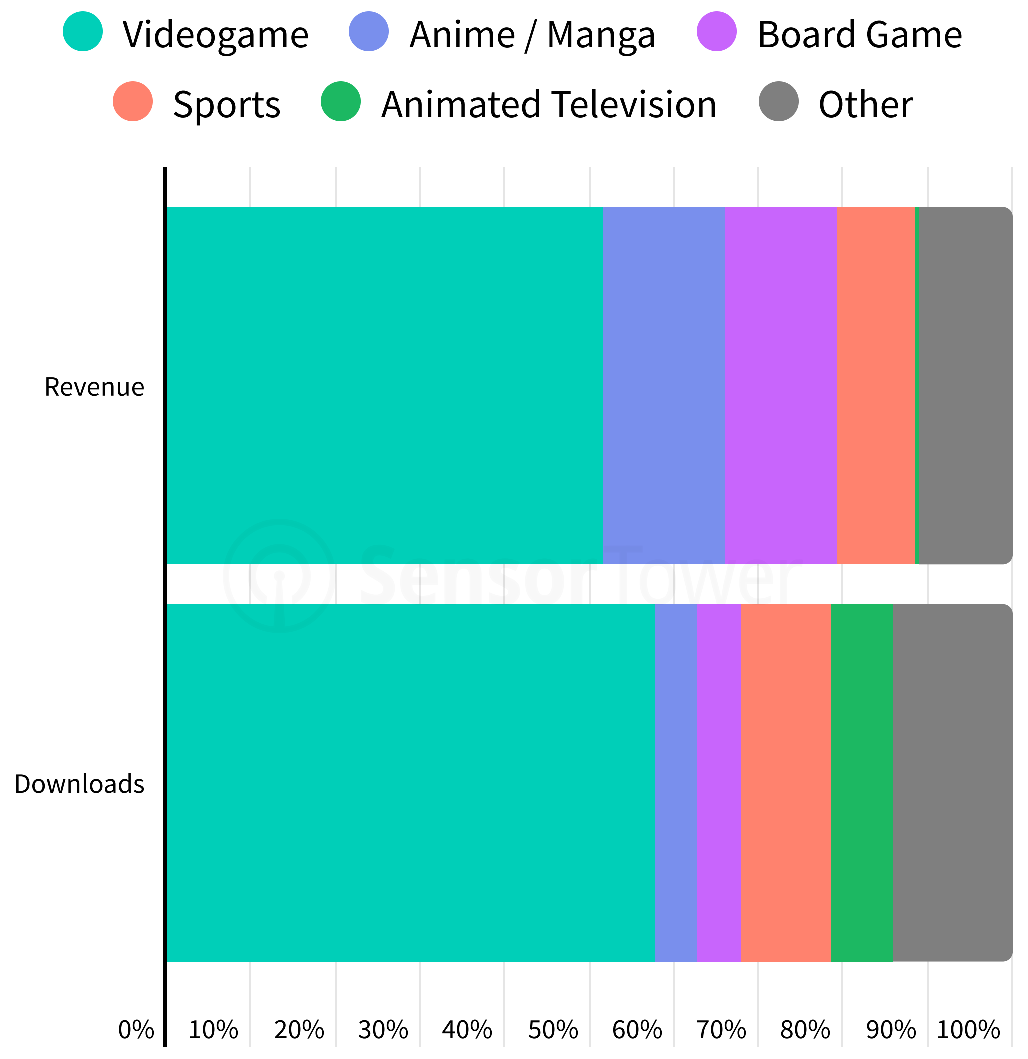
Use Game IQ tags to identify competitors and and size feature markets. From webstores and minigames to async PvP and weapon cosmetics, Game IQ has you covered.

Source: Sensor Tower Mobile App Insights
Note: iOS and Google Play combined. iOS only for China. Revenue is gross — inclusive of any percent taken by the app stores. Apps classified using Sensor Tower's taxonomy as of January 2026.

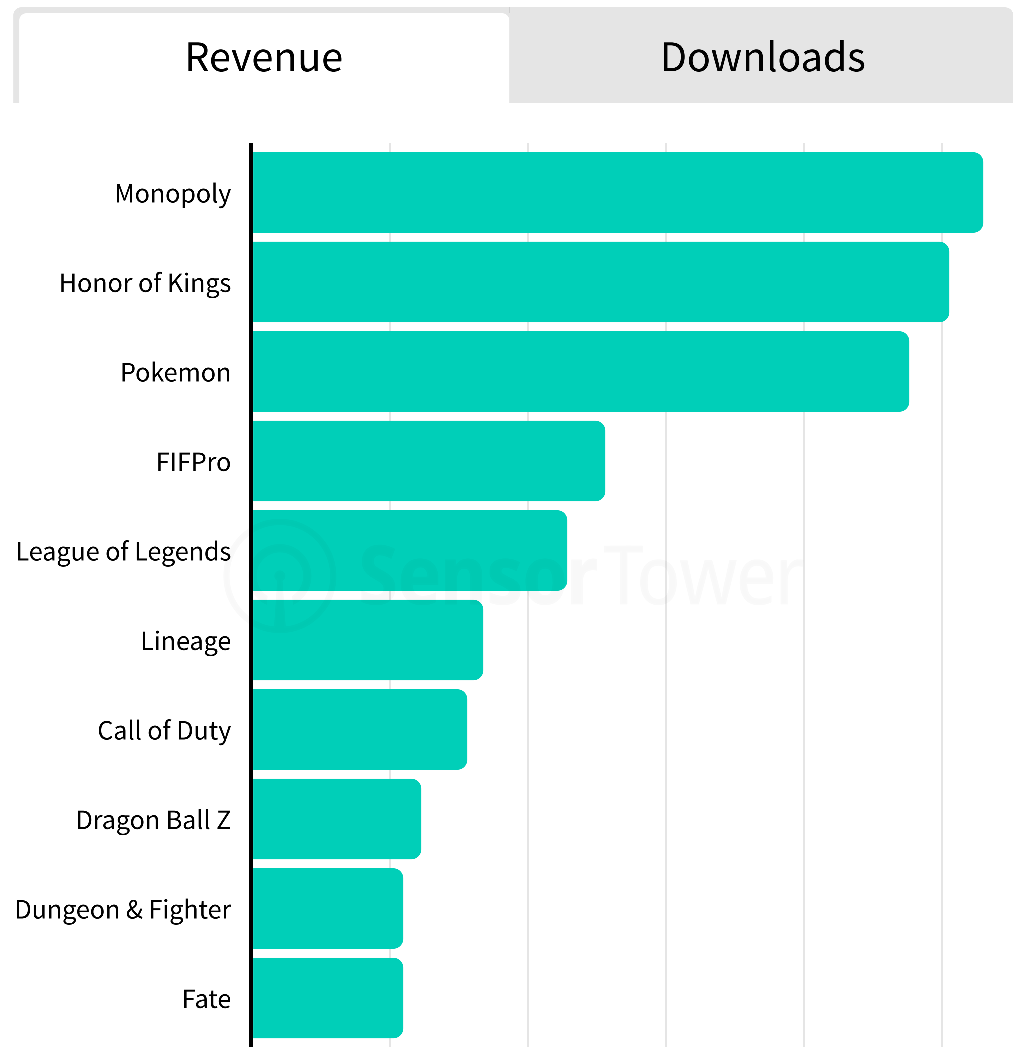
Top IP Corporate Parents in Mobile Gaming
2025 Worldwide



IP Media Type Mobile Game Market Share
2025 Worldwide



Top IPs in Mobile Gaming
2025 Worldwide



Mobile Market

Consumers Spent More in Apps Than Games for the First Time

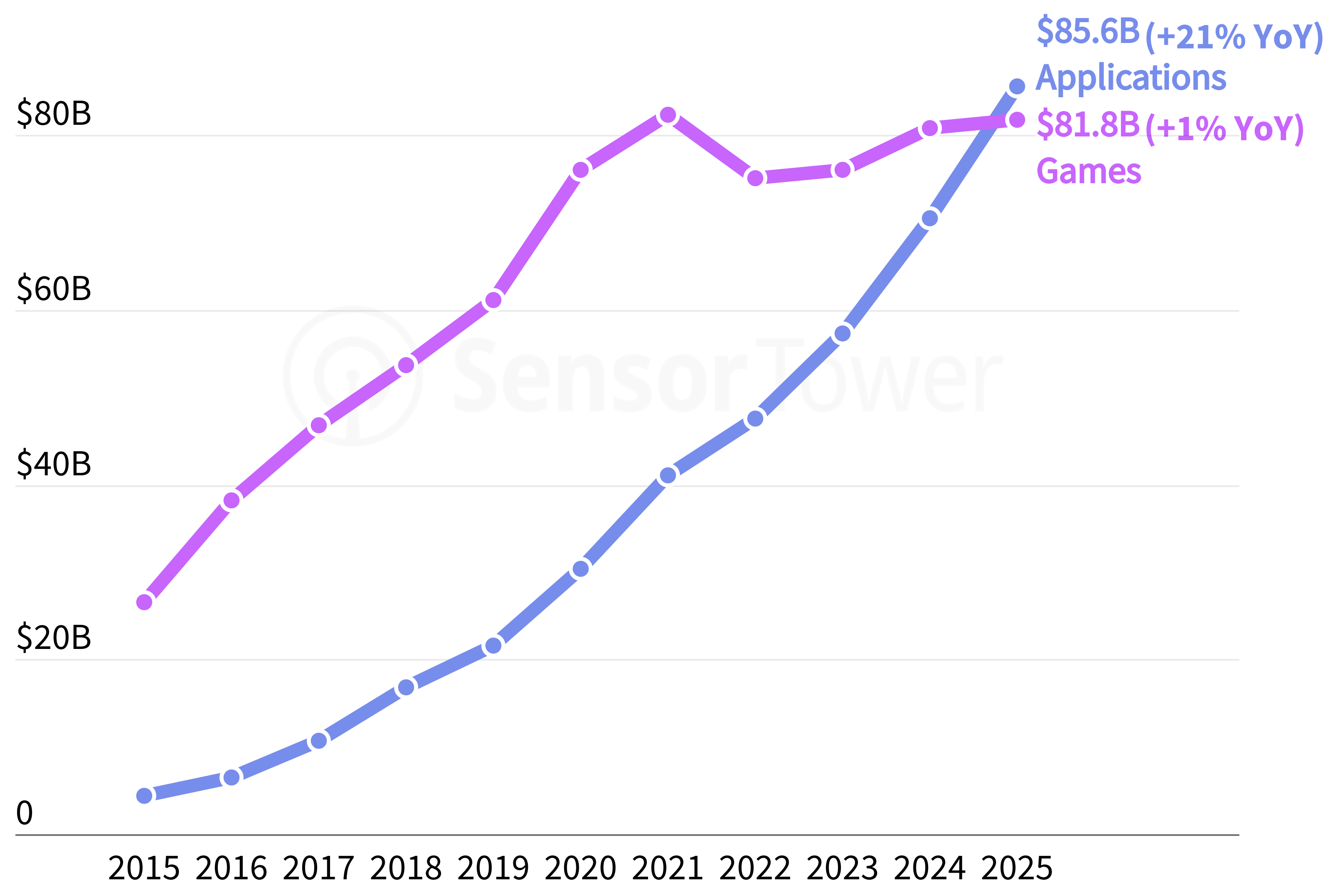
In 2025, IAP revenue from non-game apps surpassed that from games: an outcome that seemed highly improbable just a few years ago. Consumers spent approximately $85 billion in apps in 2025, representing a striking 21% YoY increase and 2.8x the amount spent five years earlier. Generative AI led revenue growth, but it was not the only driver. Nearly all app genres recorded positive IAP revenue growth again in 2025, underscoring the broad-based strength of app monetization beyond games.

Need Visibility Beyond Gaming?
Look out for Sensor Tower's Digital Market Index report published every quarter, covering the latest trends across mobile, digital advertising, and retail media.

Source: Sensor Tower Mobile App Insights
Note: iOS and Google Play combined. iOS only for China. Revenue is gross — inclusive of any percent taken by the app stores.

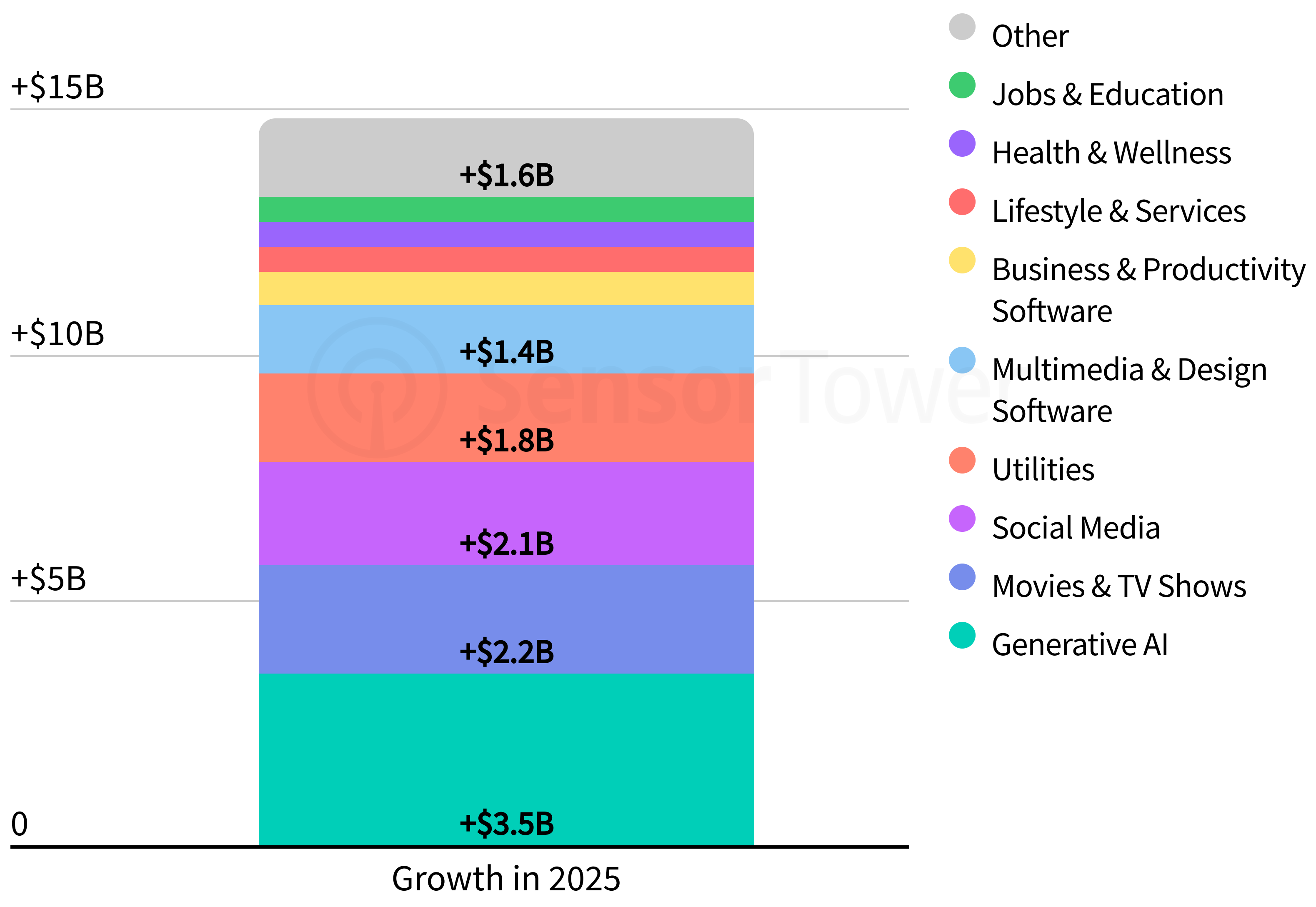
Yearly Worldwide App IAP Revenue

2015 - 2025



Worldwide IAP Revenue Growth by Non-Game Genre

2025 vs. 2024



Lifestyle Skews Female, Sports Skews Male

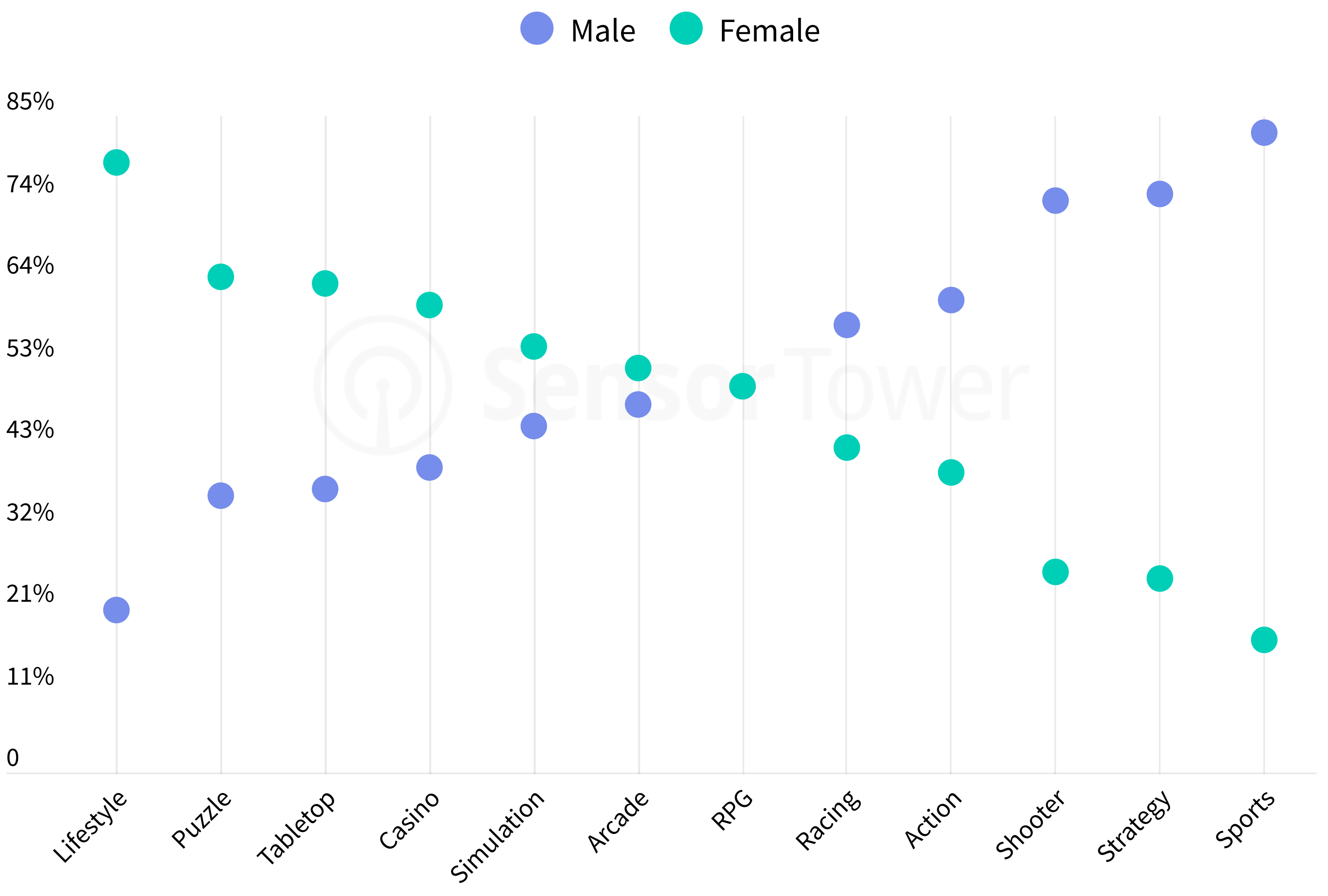
Lifestyle, Puzzle, and Tabletop games skew female in the US on average, while Sports, Strategy, and Shooter games skew male. About half of the top mobile games show broad appeal across genders, but a smaller set shows strong single-gender concentration. For example, Clash Royale and Chess.com rank among the top five apps for men but do not rank in the top 10 for women. By contrast, Subway Surfers ranks in the top five for women while remaining outside the top 10 for men.

Rule #1: Know Your Audience
Sensor Tower customers can use Audience Insights to analyze more categories, user personas, and audience segments.

Source: Sensor Tower Audience Insights
Note: Among Android users in the United States. Includes YouTube and excludes other pre-installed apps. Gender represented as Men and Women only and is not representative of all gender identities. Demographics by app genre include the top 25 apps for each genre by average MAU in the United States.

Gender Breakdown Among Game Genres

United States in 2025



Top Apps by Share of Audience Using App

United States in 2025

	Male	Female
1	Roblox	Roblox
2	Clash Royale	Block Blast!
3	Chess	NYT Games
4	NYT Games	Pokémon GO
5	Block Blast!	Subway Surfers
6	Xbox	Minecraft
7	Brawl Stars	Happy Color
8	PlayStation App	Pokémon TCG Pocket
9	Pokémon TCG Pocket	Offline Games - No Wifi Games
10	Pokémon GO	Solitaire Associations Journey

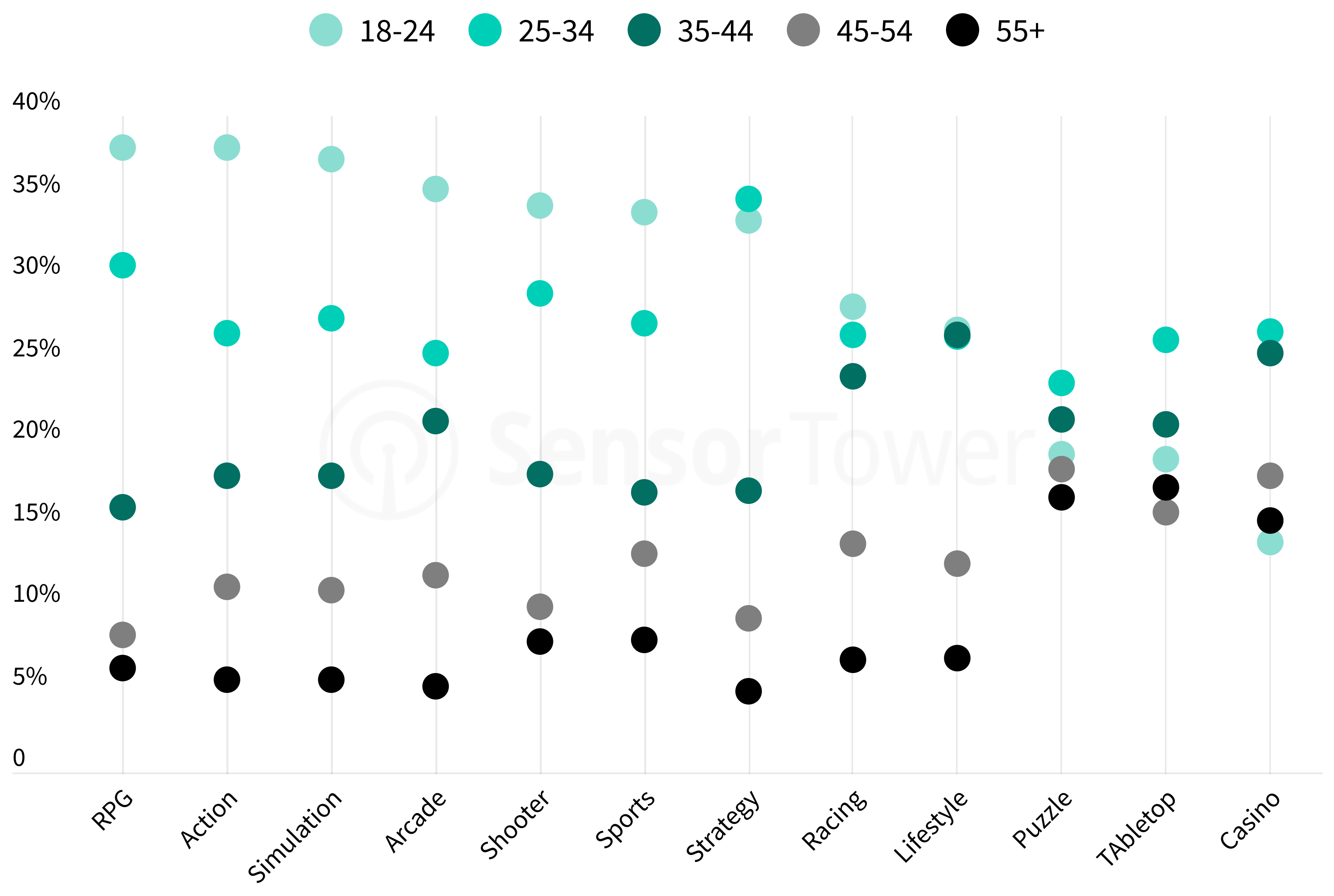
Mobile Market

Roblox and Block Blast! Capture Broad Appeal Across Generations

Highly immersive and competitive genres such as RPG, Action, and Simulation skew younger, while Tabletop, Puzzle, and Casino skew older. Looking at top apps by audience share, titles such as Clash Royale, Brawl Stars, and Minecraft are especially popular among younger users, highlighting stronger preference for competitive and deeper-engagement experiences. Meanwhile, Roblox, NYT Games, and Block Blast! stand out for broad cross-generational appeal, ranking near the top across nearly every age group.

Source: Sensor Tower Audience Insights
Note: Among Android users in the United States. Includes YouTube and excludes other pre-installed apps.
Demographics by app genre include the top 25 apps for each genre by average MAU in the United States.

Age Breakdown Among Select Categories
United States in 2025



Top Apps by Share of Audience Using App
United States in 2025

	18-24	25-34	35-44	45-54	55+
1	Roblox	Roblox	Roblox	Roblox	NYT Games
2	Block Blast!	NYT Games	NYT Games	NYT Games	Roblox
3	Clash Royale	Block Blast!	Block Blast!	Block Blast!	Block Blast!
4	NYT Games	Chess	Chess	Chess	Vita Mahjong
5	Chess	Pokémon GO	Pokémon GO	Pokémon GO	Candy Crush Saga
6	Brawl Stars	Clash Royale	PlayStation App	Clash Royale	Chess
7	Xbox	Pokémon TCG Pocket	Minecraft	Candy Crush Saga	Royal Match
8	Minecraft	PlayStation App	Xbox	Brawl Stars	Clash Royale
9	Pokémon TCG Pocket	Xbox	Pokémon TCG Pocket	Happy Color	Words With Friends
10	Pokémon GO	Brawl Stars	Candy Crush Saga	Meta Horizon	Wordscapes

2025 Rankings by Market | Top Games

Worldwide

Downloads

#	App Name	Change	Game Subgenre
1	Block Blast!	▲	Block
2	Roblox	=	Sandbox
3	Garena Free Fire	▼	Battle Royale
4	Subway Surfers	▼	Platformer / Runner
5	Pizza Ready!	=	Time Management
6	Ludo King	=	Board
7	Hole.io	▲	.io
8	Vita Mahjong	▲	Mahjong
9	EA SPORTS FC Mobile Soccer	▲	Realistic Sports

IAP Revenue

#	App Name	Change	Game Subgenre
1	Last War:Survival	▲	4X Strategy
2	Whiteout Survival	▲	4X Strategy
3	Royal Match	▼	Swap
4	MONOPOLY GO!	▼	Coin Looters
5	Honor of Kings	▼	MOBA
6	Candy Crush Saga	=	Classic Match 3
7	Coin Master	▲	Coin Looters
8	Roblox	▼	Sandbox
9	Game for Peace	▲	Battle Royale

Monthly Active Users

#	App Name	Change	Game Subgenre
1	Roblox	=	Sandbox
2	Garena Free Fire	=	Battle Royale
3	Subway Surfers	=	Platformer / Runner
4	Block Blast!	▲	Block
5	Candy Crush Saga	=	Classic Match 3
6	Mobile Legends: Bang Bang	=	MOBA
7	Brawl Stars	▼	MOBA
8	Clash Royale	▲	Real-Time Strategy
9	Ludo King	▼	Board

Source: Sensor Tower Mobile App Insights
Note: iOS and Google Play combined. iOS only for China. Revenue is gross — inclusive of any percent taken by the app stores. Games classified using Sensor Tower's taxonomy as of January 2026.

03

Mobile Live Ops

As downloads become harder to win, each one needs to generate more value. Live ops is increasingly central, and high-quality execution is shifting from differentiation to table stakes.

"Sensor Tower has become a vital engine for our product innovation and creative inspiration. As we grew, we expanded our use cases to deep-dive into different game mechanics and trending titles across the globe. It is now our primary tool for analyzing diverse mechanics and discovering new potential titles."

Aziz Firat Avsar
CMO
Loop Games

Live Ops Shifted Towards Progression, Competition

Live ops in 2025 shifted toward retention and repeat play, consistent with a market that is leaning less on new-user volume and more on value per user. The mix of new events suggests teams are investing more in systems that sustain engagement and expand lifetime value rather than relying on short-term spikes.

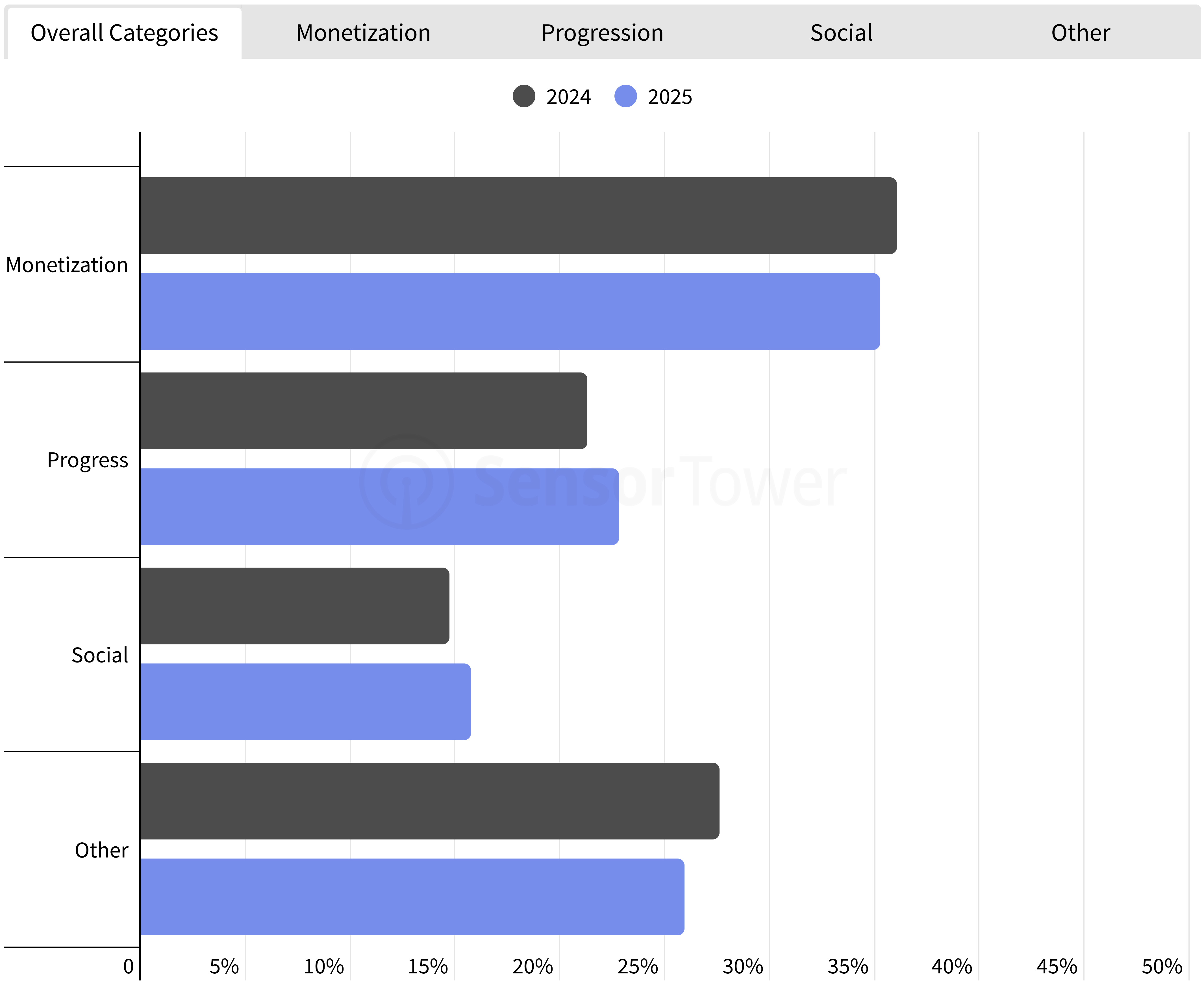
Progression design consolidated around milestone-based structures, while social leaned further into repeatable competitive templates like tournaments, sprints, and club play, creating clearer reasons to return.

Monetization did not shrink so much as evolve, with less reliance on regular offers and more emphasis on mechanic-led formats like gacha and multi-pass systems that can monetize over a longer horizon.

Speed Up Your Live Ops Responses.
Live Ops Insights shows what competitors are running in real time so you can react faster, calibrate your calendar, and avoid getting outpaced.

Source: Sensor Tower Live Ops Insights

Mobile Game New Event Trends
% Share of New Events by Category, Mechanic



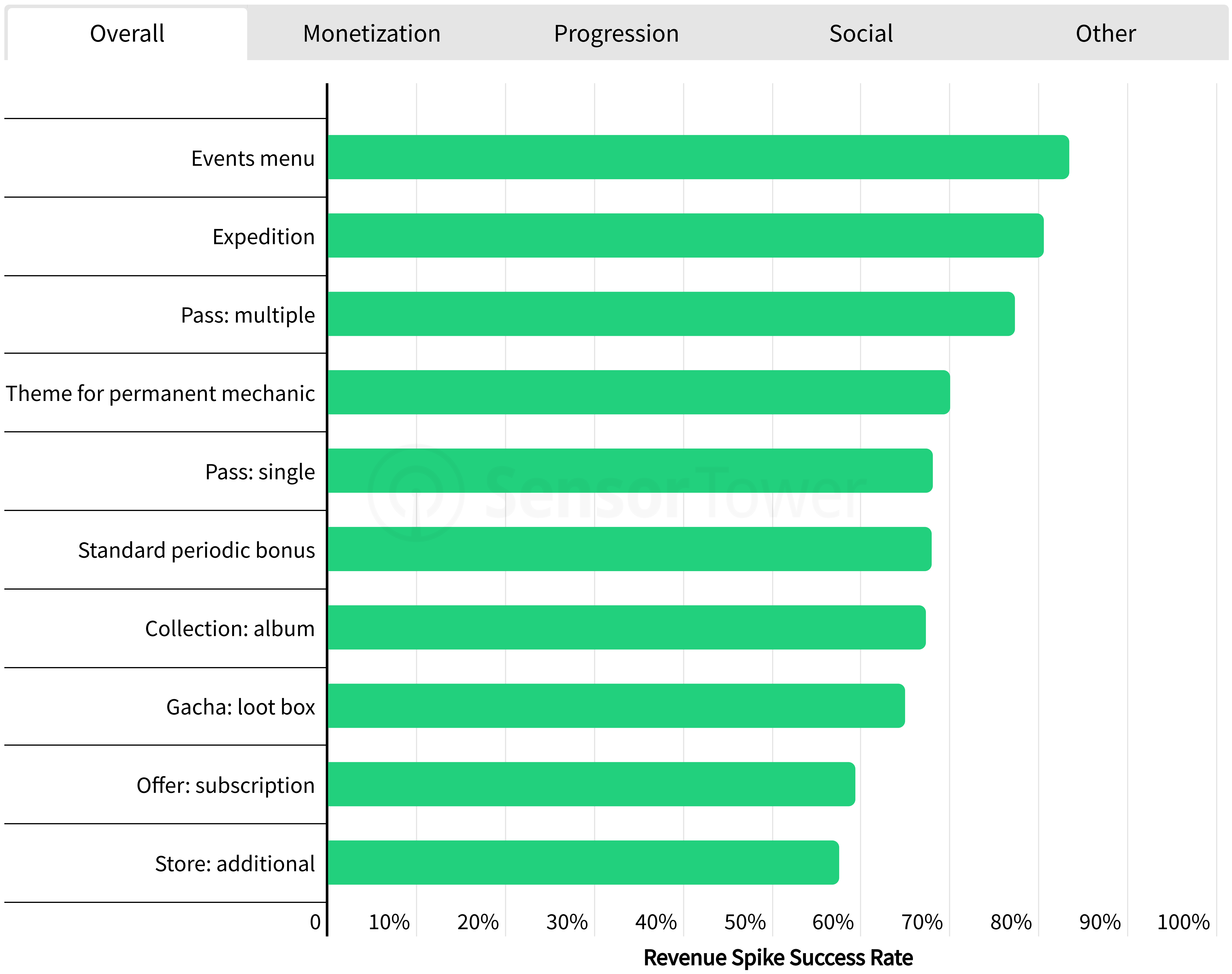
Most Consistent Events Blend Progression, Pay

Event menus were the most consistent feature associated with revenue lift: 83.4% of events tracked by Playliner and tagged “Events menu” were accompanied by a revenue lift. This suggests long-term live ops success does not come from a single standout event, but from interlocking systems that align with player motivations.

That said, features that blend progression with monetization and economy systems appear especially consistent. Expeditions ranked #2 and Pass: multiple (multi-tier season passes) ranked #3, with Pass: single at #5 and Collection: album at #7. These features combine engagement and retention rewards with resource sinks and monetization, with passes contributing directly to revenue and expeditions often serving as premium currency sinks.

Top Event Mechanics by Revenue Spike Success Rate

All time, all titles tracked by Playliner. Only mechanics with >30 event instances on >5 titles included



Note: Revenue spike success rate defined as a revenue spike of >5%compared to the same day of the previous week, with the trend remaining active as long as each subsequent day stays >5% higher than its counterpart from the week before. Reference week is shifted after one week to the week before the trend started to maintain a more normal baseline.For extended events, correlations with revenue spikes are only checked for during the first and last weeks.

Source: Sensor Tower Live Ops Insights, Mobile App Insights. Revenue is IAP revenue on the App Store and Google Play

Paid Unlocks for Accumulated Rewards Gained Traction

Playliner tracked 34 new events in 2025 that combined monetization offers with milestone rewards, with top performers such as MONOPOLY GO!, Gossip Harbor, and Royal Kingdom incorporating similar events into their calendars. These events function like mini passes without a free track. By letting players unlock value through continued engagement, these events align with the broader shift toward fewer downloads and deeper monetization. As download volume declines and acquisition becomes more expensive, games are pushing harder to retain and engage each player.

See Exactly How MONOPOLY GO! Executed This Event
Playliner subscribers can view the full event flow, update history, and related mechanics in the complete breakdown.

Source: Sensor Tower Live Ops Insights
Note: Cohort defined as events with "Offer: non-standard as primary mechanic, tagged with Milestone rewards tags with non-empty duration.

Paid Access to Accumulated Rewards Event Statistics

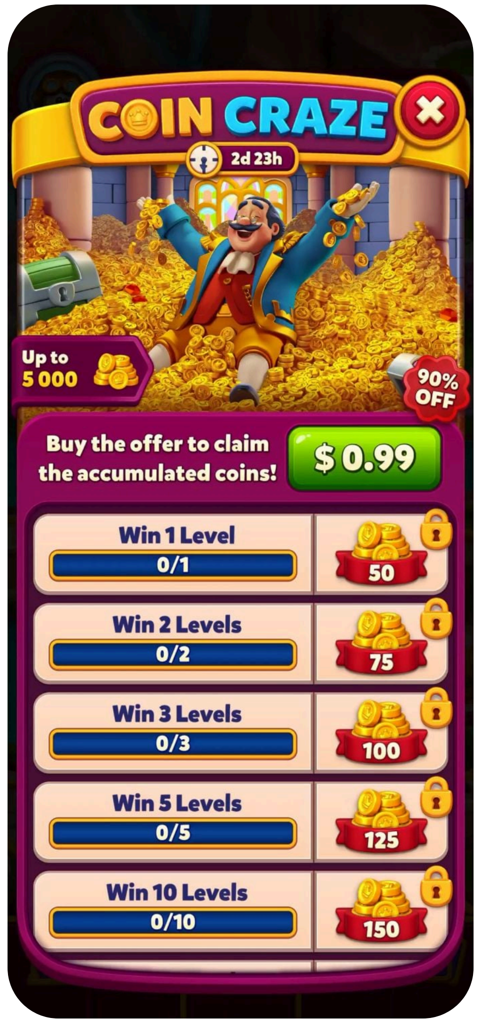
Metric	#
Revenue Success Rate	50%
# of Tracked Games with Event in Cohort	56
# of Events Tracked	1244
Average Release Revenue Impact	18%
Average Duration	7 days
# of New Events Tracked in 2025	34

Paid Access to Accumulation Rewards Event Examples

MONOPOLY GO!

Gossip Harbor

Royal Kingdom



Web Store Promotions Gained Traction in 2025

Offers that directly surface web stores to players became more common in 2025, especially among casino games. These promotions typically add incremental rewards versus in-app purchase options to offset the extra friction of leaving the app and completing a purchase on the web. This reflects a broader monetization shift toward higher-value payer conversion and margin optimization. Casino games appear particularly well suited to this approach because of their mature live ops systems, frequent offer cadence, and highly monetization-oriented audiences.

Track the Entire Player Purchase Journey
Use Game IQ to identify games with web stores, Live Ops Insights to analyze promotion implementations, and Web Insights to see which store paths attract the most traffic.

Source: Sensor Tower Live Ops Insights
Note: Cohort defined as Offer events tagged with Web store with non-empty duration.

Web Store Offer Event Statistics

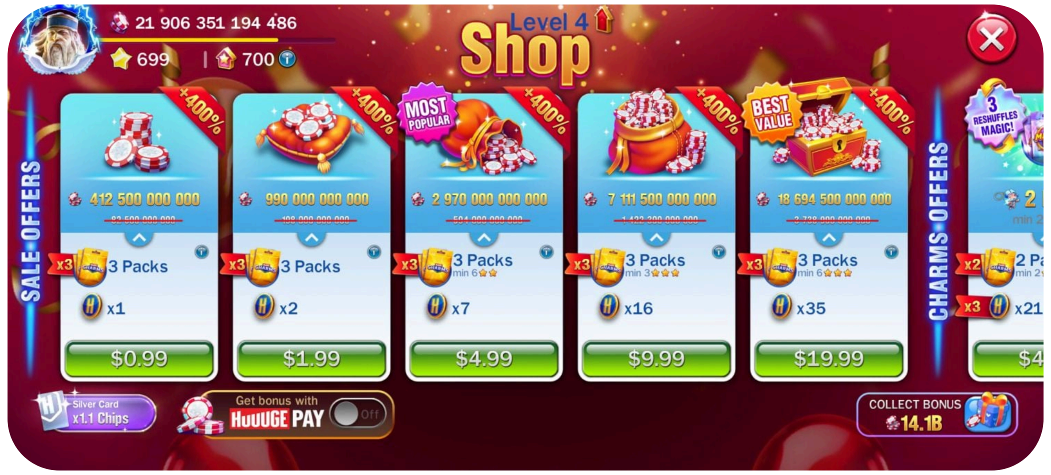
Metric	#
Revenue Success Rate	55%
# of Tracked Games with Event in Cohort	19
# of Events Tracked	1771
Average Release Revenue Impact	22%
Average Duration	5 days
# of New Events Tracked in 2025	10

Webstore Promotion Event Examples

Coin Master

Quick Hit Slots Casino

Huuuge Casino



Merge Mechanic Events in Match-Swap Games Gained Traction

Merge games saw strong growth in 2025, led by Gossip Harbor. Match-swap remains the leading puzzle subgenre by IAP revenue, but several top titles are riding the merge trend by adding merge events to their live ops calendars. These events also tend to run long, averaging 14 days, giving players a robust merge experience without leaving the core game. This may also help blunt the impact of merge-mechanic ad creatives from competing titles. Players who have already engaged with a merge event may be less responsive to the novelty of seeing that mechanic for the first time in ads elsewhere.

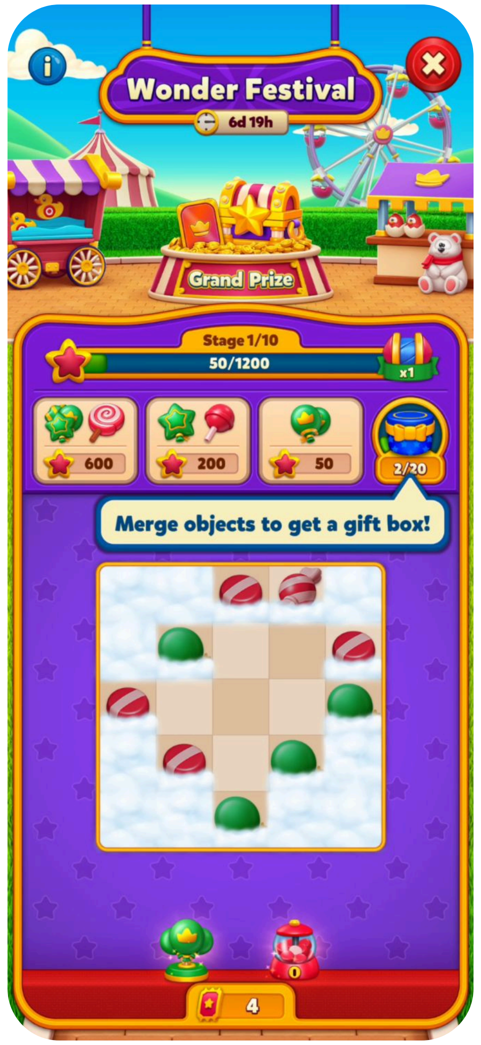
Source: Sensor Tower Live Ops Insights
Note: Cohort defined as events with "Offer: non-standard as primary mechanic, tagged with Milestone rewards tags with non-empty duration.

Merge Mechanic in Match Swap Event Statistics

Metric	#
Revenue Success Rate	75%
# of Tracked Games with Event in Cohort	11
# of Events Tracked	180
Average Release Revenue Impact	15%
Average Duration	14 days
# of New Events Tracked in 2025	7

Match Mechanic Event Examples in Match Swap Games

Royal Match



Gardenscapes

Matchington Mansion

Mobile Live Ops

Gossip Harbor Showcases Best-Practice Segmentation

Playliner analysts compared how Gossip Harbor changes the player experience across spending and engagement tiers using three buckets: a non-paying account, a dolphin account that spent $51, and a whale account that spent $113. The experiences differed meaningfully by segment, with lower price points shown to the free-to-play account and higher offer density shown to the whale account than to the dolphin account.

Read the Full Report

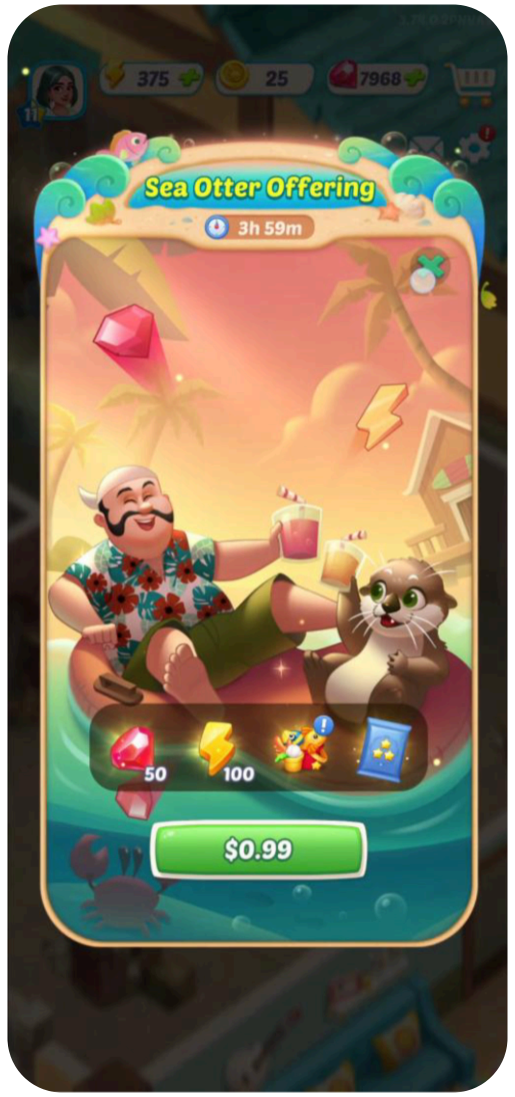
Subscribers can review the full report here.

See exactly how the buckets differed along with more segmentation examples.

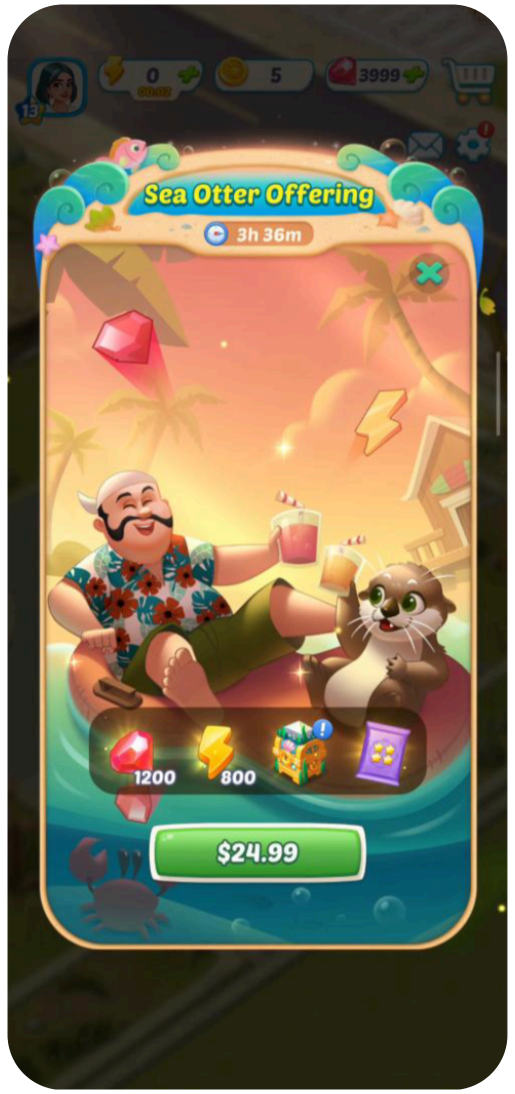
Source: Sensor Tower Live Ops Insights

Different Versions of Offer by Player Segmentation

Free-to-play



Dolphin, Whale



Whale only, after first offer

Paid Access to Accumulated Rewards Event Statistics

Day	Offer design	Price			Content		
		Non-Paying	Dolphin	Whale	Non-Paying	Dolphin	Whale
1	Sea Otter Offering	1.99	1.99	1.99	100, 100	100, 100	100, 100
		0.99	0.99	–	50, 100	50, 100	–
2	Sea Otter Offering	1.99	1.99		100, 100	100, 100	100, 100
		0.99	0.99	0.99	50, 100	50, 100	50, 100
3	Sea Otter Offering	1.99	1.99	1.99	100, 100	100, 100	100, 100
						Purchases made	Purchases made
		0.99	0.99	0.99	50, 100	50, 100	50, 100
4	Sea Otter Offering	1.99	24.99	24.99	100, 100	1200, 800	1200, 800
		0.99	–	19.99	50, 100	–	1000, 400
		–	–	14.99	–	–	700, 600

Mobile Live Ops

Total Battle Shatters the $100 Offer Ceiling

Playliner analysts reviewed 22 games across Slots and Coin Looters, plus the top 20 grossing games from other genres, to identify the most expensive offers and store listings shown to non-paying accounts. While most games appeared to cap both at around $100, a few broke that informal ceiling. Total Battle's Feed Your Dragon offer was priced at $250, while Cash Tornado and DoubleU Casino each surfaced $300 store offerings. As publishers look to deepen spend in a tougher market, understanding the upper bound of player willingness to pay for a single bundle is increasingly important.

See the Full Analysis
Subscribers can dive deeper with the full breakdown here. See what type of offers were the most expensive and how many different offers each game had.

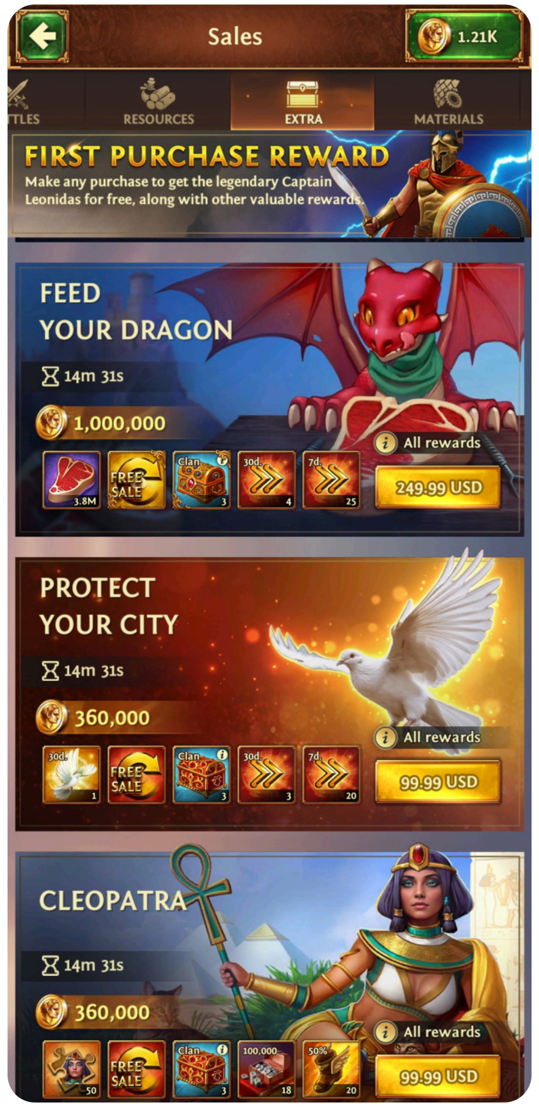
Source: Sensor Tower Live Ops Insights

Most Expensive Offers

Overall | 4X Strategy | Match/Merge | Slots | Coin Looters

	Most Expensive Offer	Most Expensive Store Offering
Total Battle	$249.99	$49.99
Cash Tornado	$99.99	$299.99
DoubleU Casino	$99.99	$299.99
Last War:Survival Game	$99.99	$99.99
Kingshot	$99.99	$99.99
Whiteout Survival	$99.99	$99.99
Evony: The King's Return	$99.99	$99.99
Dark War Survival	$99.99	$99.99
Cash Frenzy	$99.99	$99.99
POP! Slots	$99.99	$99.99

The Most Expensive Offer: Top Battle's Feed Your Dragon.



04

Mobile Marketing

As mobile downloads remain under pressure, marketing efficiency matters more than ever. Leading publishers are adapting channel mix, creative strategy, and acquisition tactics to compete in a tougher environment.

"Historically, our company has released new apps on a regular basis but the industry market has changed dramatically in recent years and we predict further dynamic changes in the near future. Leading into these changes, collecting and analyzing data is essential for us to make bold and reliable decisions in our strategies. This is where it becomes important to combine a "macro perspective" that captures global app store trends with a "micro perspective" that digs deeper into individual user behavior. Sensor Tower covers this multifaceted data with extremely high accuracy, and we are confident that they will continue to be an extremely reliable partner in formulating future marketing strategies."

Tomohiko Matsuno
Executive Officer and CMO
CYBIRD Inc.

Mobile Marketing

Ad Spend Crowded into Casual Despite Lower IAP Revenue Share

Mobile advertisers concentrated spend in Lifestyle & Puzzle in the US in 2025, even though the category captured a smaller share of US IAP revenue. Casino showed the opposite pattern, with a much larger IAP share than ad spend, while Action & Strategy was close to balanced.

Japan shows a similar mismatch in Lifestyle & Puzzle, but the biggest imbalance flips to Action & Strategy: it generates the majority of IAP revenue while taking a smaller share of ad spend.

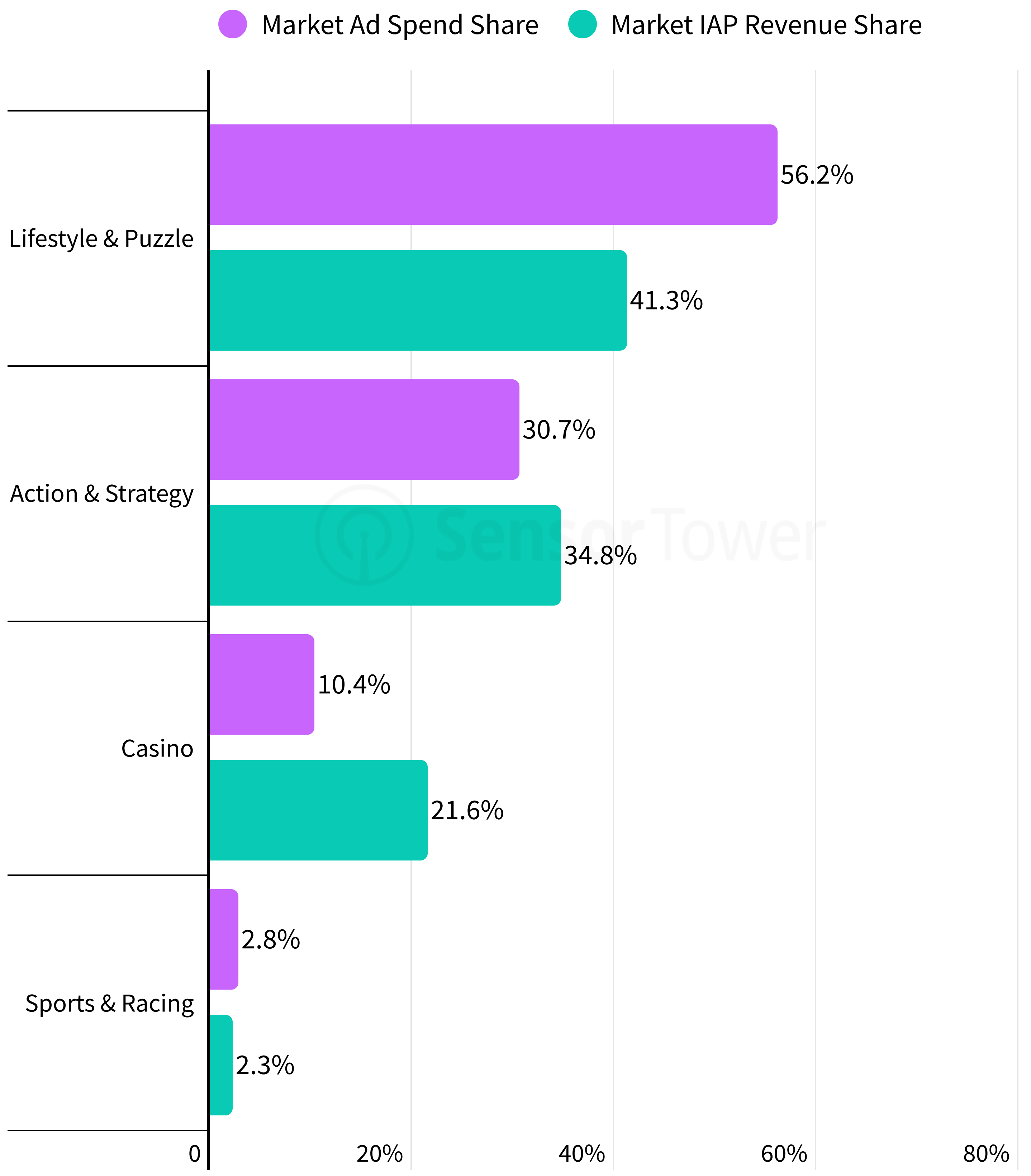
Ad competition is most crowded in Lifestyle & Puzzle relative to its IAP revenue pool, while categories with higher IAP share often face less paid pressure. Use the spend-to-revenue gap as a signal for category-level UA difficulty and where marginal ad dollars are likely to be most expensive.

Paying to Win: Game Advertising in 2025
Check out the State of Game Advertising report for a deeper dive into game advertising market trends, the biggest spenders, and the latest winning tactics.

Source: Sensor Tower Mobile App Insights, Pathmatics Digital Advertising Insights
Note: iOS and Google Play combined. iOS only for China. Revenue is gross — inclusive of any percent taken by the app stores. Games classified using Sensor Tower's taxonomy as of January 2026. Available digital ad channels vary by market.

Mobile Game Class Ad Spend Share and IAP Revenue Share
2025

United States



Included Ad Channels
Only select ad channels are

Ad Channel	Included?
Facebook	✓
Instagram	✓
LINE	○
LinkedIn	✓
NAVER	○
Pinterest	✓
Reddit	✓
Snapchat	✓
TikTok	✓
X	✓
YouTube	✓
Desktop Display	✓
Desktop Video	✓
Mobile Apps	✓
Mobile Display	✓
Mobile Video	○
OTT	✓
Linear TV	✓

Mobile Marketing

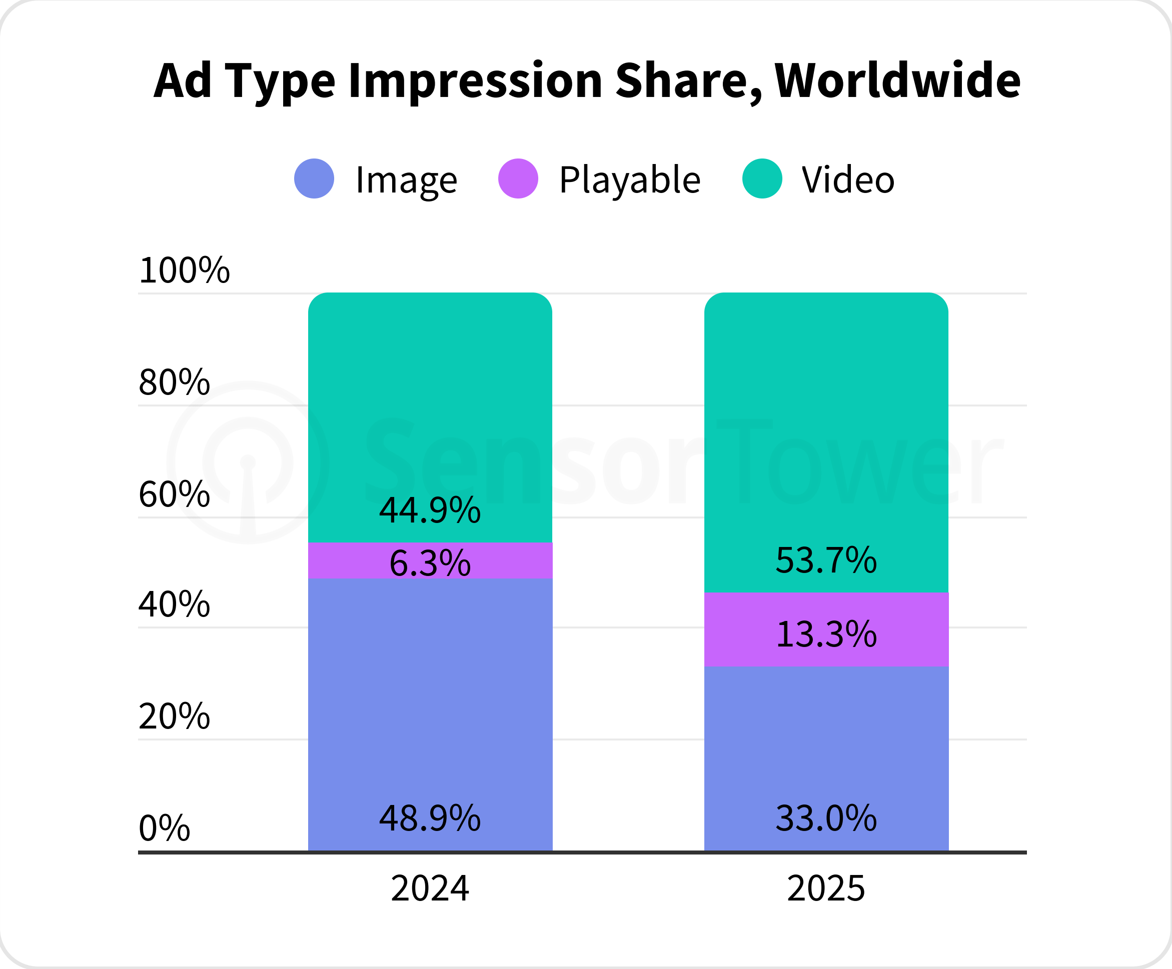
Ad Mix Concentrates Into Fewer Platforms, Formats

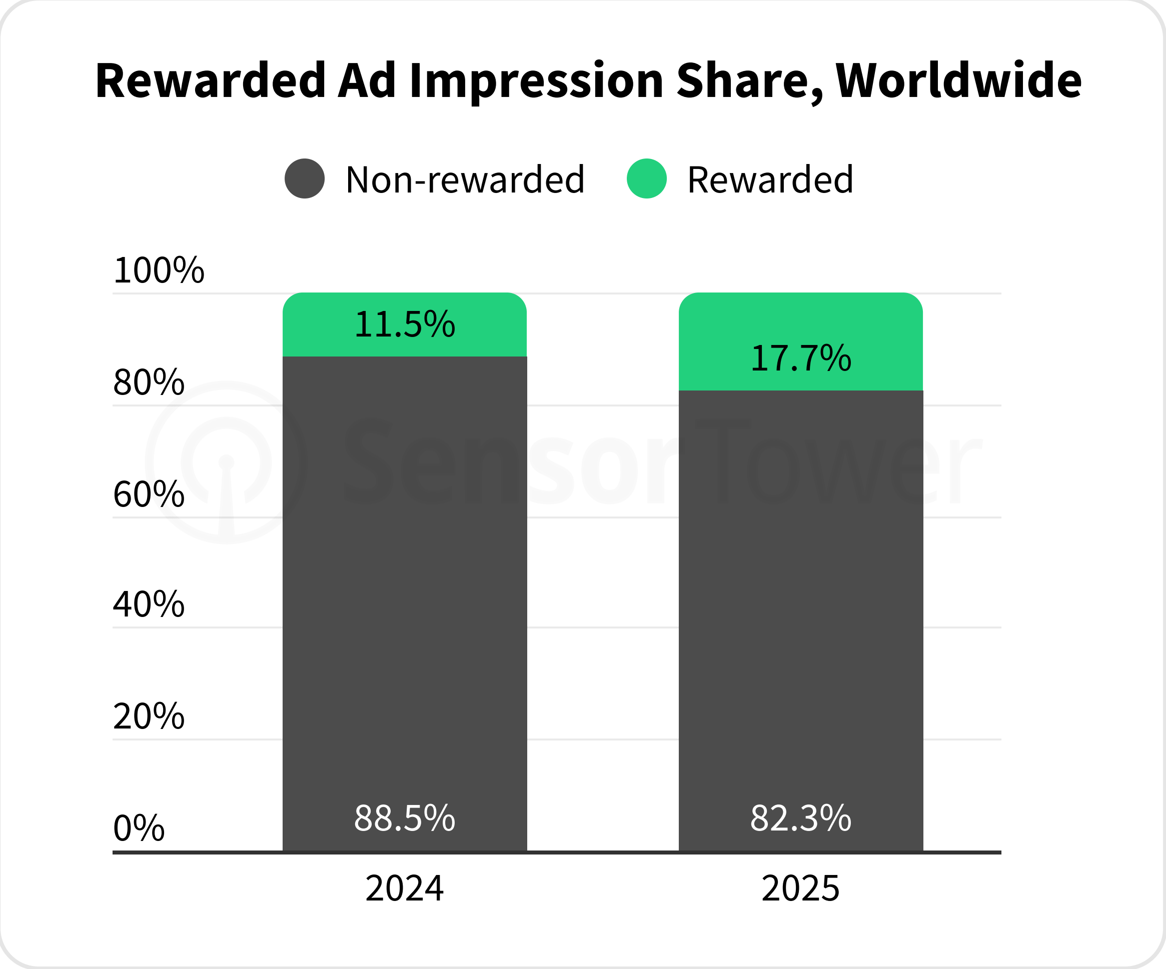
In 2025, delivery moved further into high-attention formats. Video stayed dominant, with playables taking meaningful share and rewarded placements continuing to grow. That puts more pressure on format selection and creative quality, not just network choice.

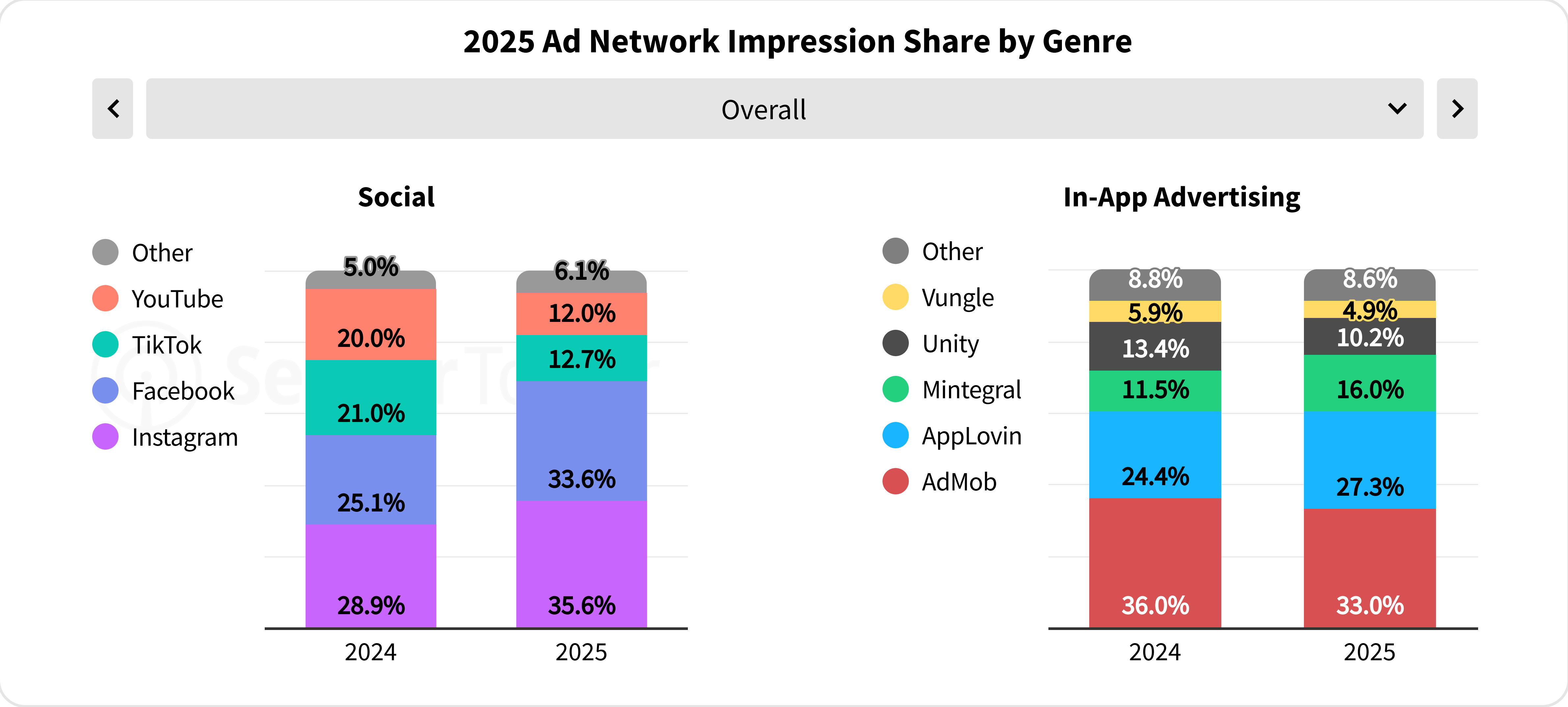
Platform consolidation accelerated toward Meta. Instagram and Facebook gained share while TikTok and YouTube declined. AppLovin and Mintegral grew roughly +30% YoY, taking share from AdMob (~+4%), signaling a shift away from legacy networks.

Exposure also clustered into fewer categories. Puzzle grew ~+40% YoY to ~30% of global exposure, and top sub-genres (Match Pair, Sandbox, Match Merge 2) each delivered 3x+ the global average.

The result: volume is concentrating, creative wears out faster, and “good enough” is less likely to hold.







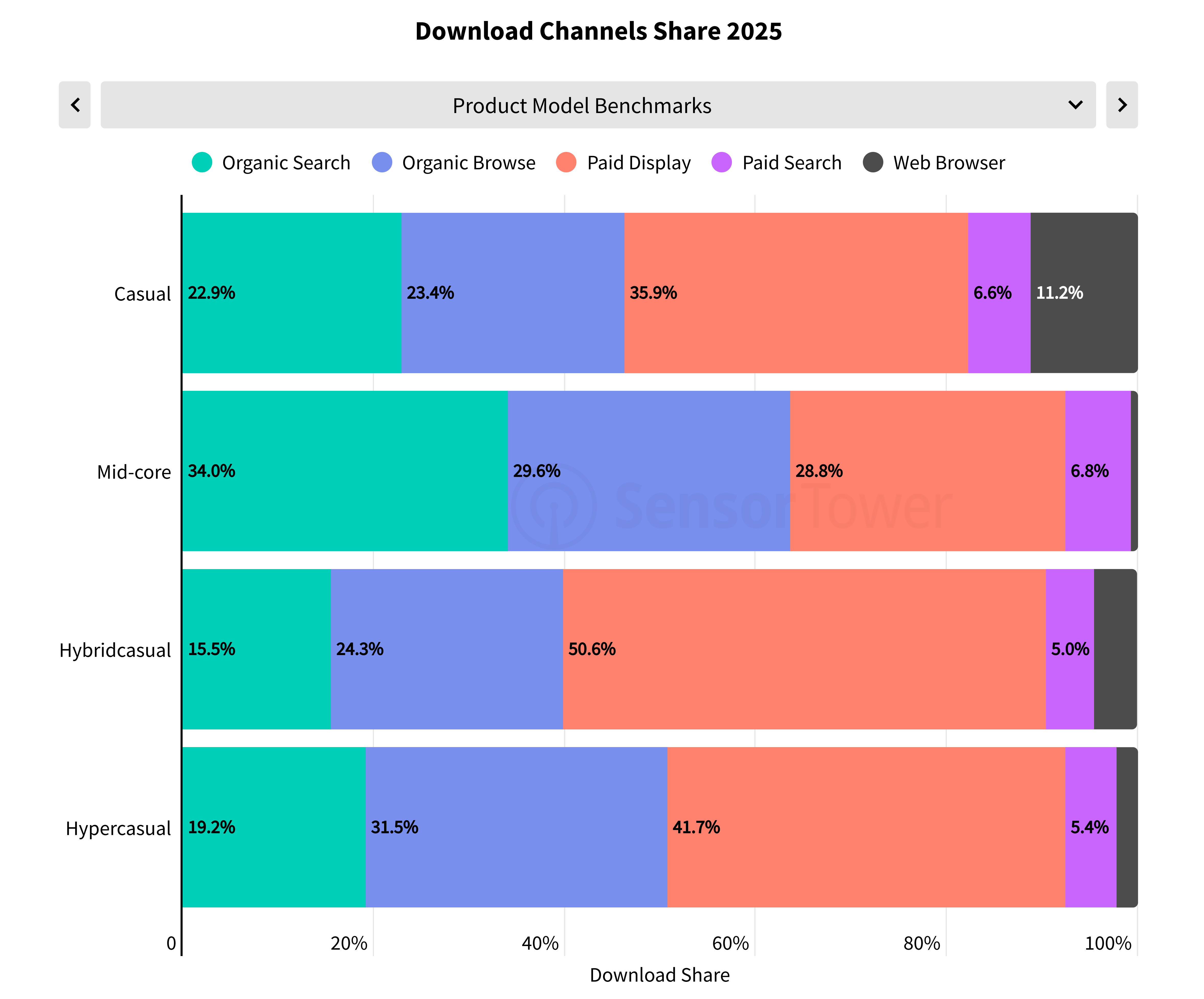
Source: Sensor Tower Mobile App Insights, Custom Data
Note: Games classified using Sensor Tower's Game IQ taxonomy.

Mid-core Drives the Highest Organic Download Share

Mid-core includes many games with strong brands, such as Roblox, Pokémon TCG Pocket, and Call of Duty: Mobile, which drive most of their downloads organically. At the same time, 2025's top two games by revenue, Last War: Survival and Whiteout Survival, are also mid-core titles, but most of their downloads came from paid sources.

Compared with Mid-core, Casual relies more on paid display and less on organic channels. Casual also stands out for its higher share of web browser-driven downloads. This likely reflects the older, broader audience Casual games tend to target, along with stronger habits around searching for games, reviews, and related content in the browser before downloading.

By comparison, Hybridcasual leans most heavily on paid channels, followed by Hypercasual. Hybridcasual is a newer product model than the others and often lacks strong brands to drive organic downloads. Hypercasual includes titles with strong keyword-driven discoverability (for example, Block Blast and Offline Games - No Wifi Games) as well as niche titles with staying power (such as Vita Mahjong and Granny).



Source: Sensor Tower Mobile App Insights
Note: Product model benchmarks are averages of top 25 games per product model by 2025 worldwide IAP revenue. Hypercasual is by 2025 Worldwide downloads.

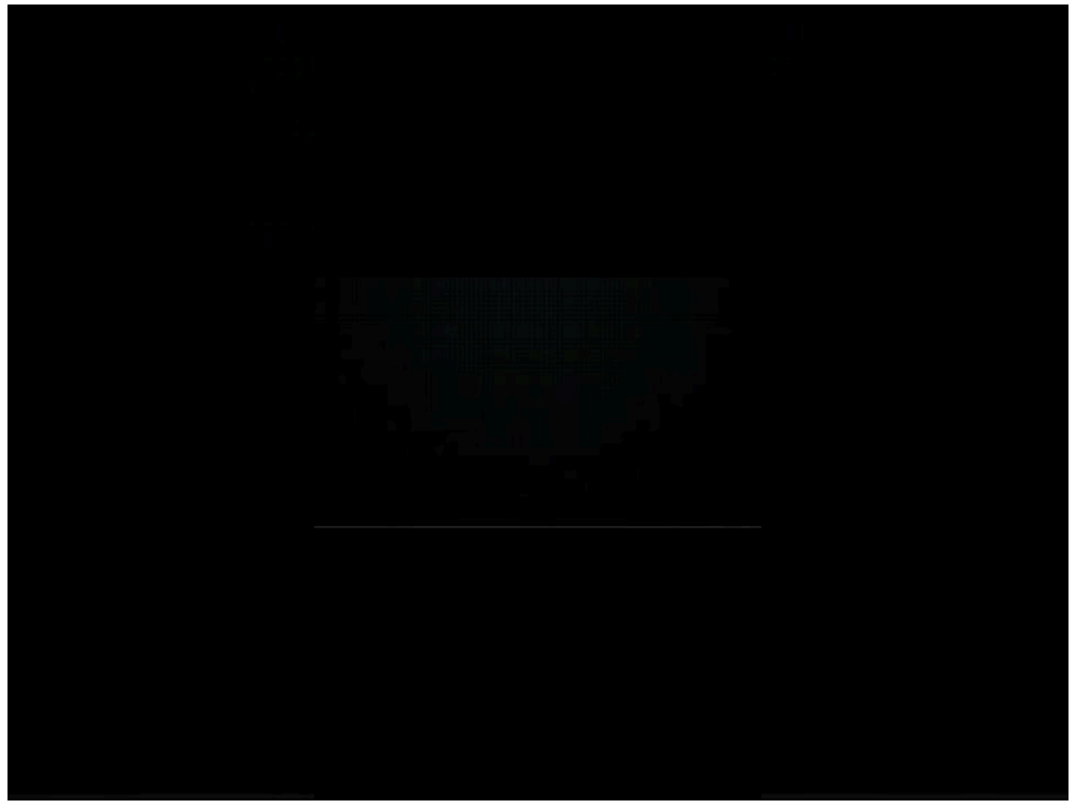
Creative Trended Toward Simplified, High-Clarity Game Loops

As downloads become harder to win and more important to monetize, ad creative increasingly needs to capture attention while prequalifying users by clearly communicating a game's core loop. Simplifying the gameplay loop, or highlighting a mini-game in creative, has become a common strategy. The tradeoff is potential downstream churn when the in-game experience does not closely match the ad, but strong performance has kept these approaches in wide use.

Track Creative Winners Fast

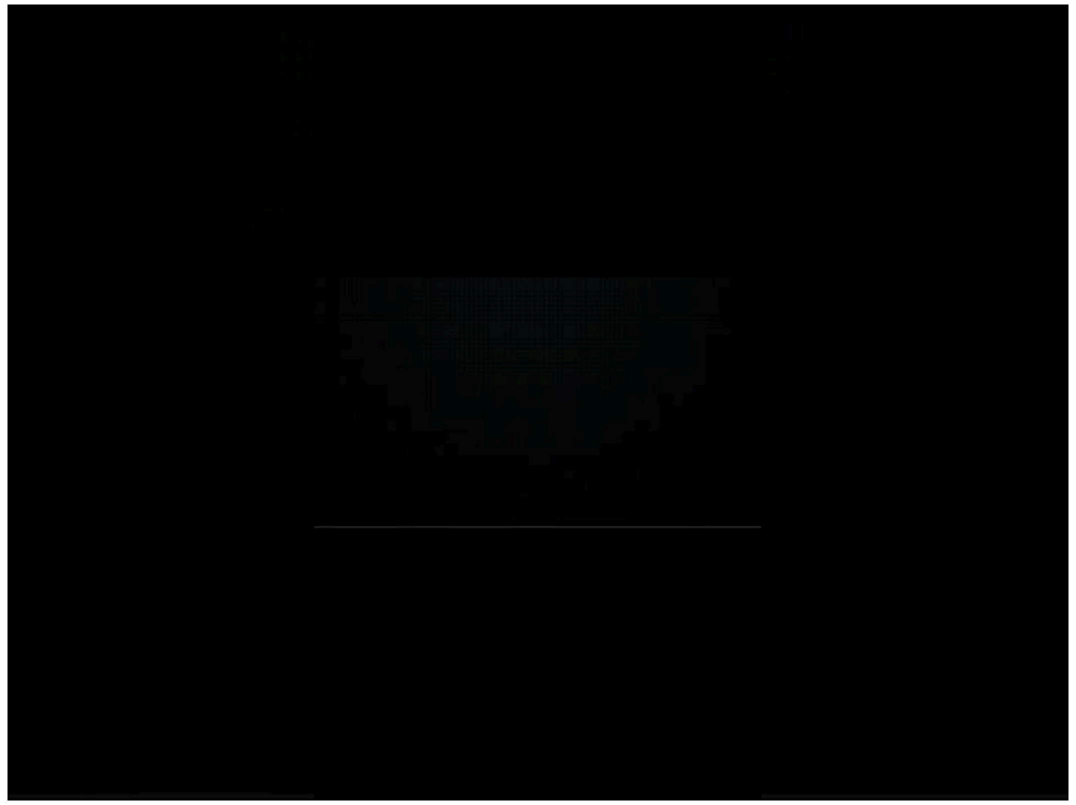
Creative winners change weekly. Use Sensor Tower's App Advertising Insights to see what is scaling in your niche today and prioritize which concepts to test next.

Royal Kingdom
#1 on US AppLovin Q4 2025



Kingshot
#1 on US Instagram Q4 2025

Top Battle
#2 on US Applovin Q4 2025

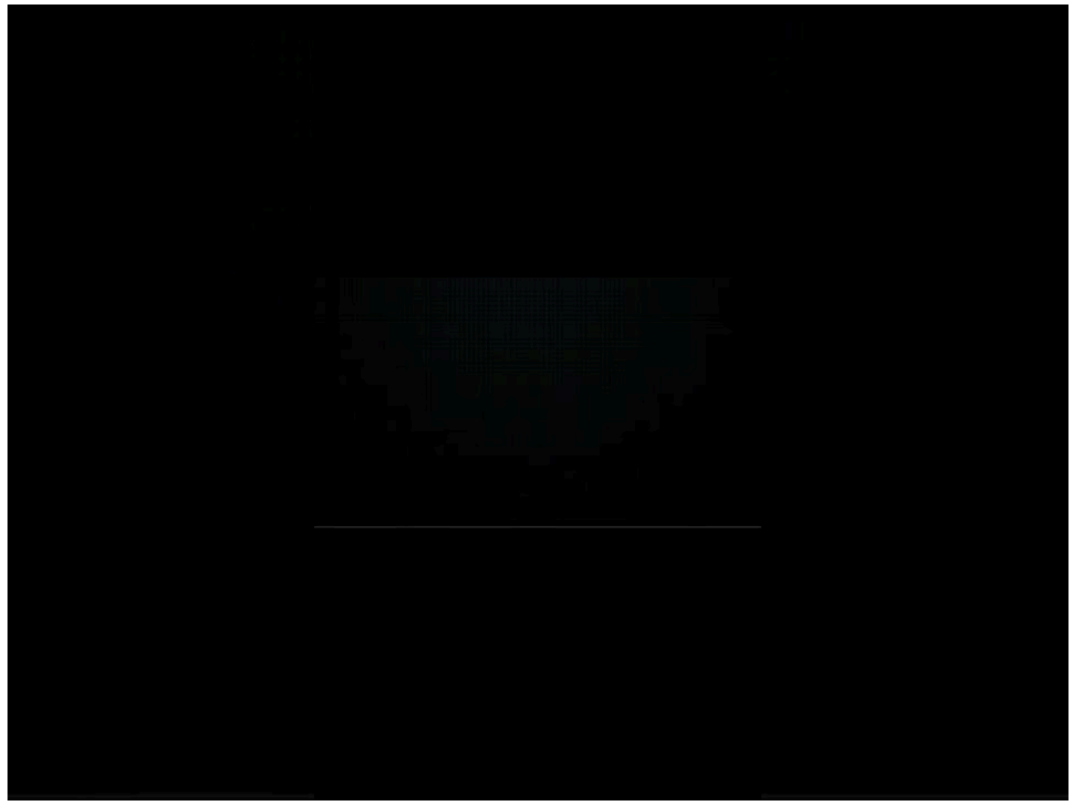


IP Collaborations Are Now a Core Creative Strategy

IP collaborations are no longer limited to platform-centric games. MONOPOLY GO! has partnered with major IP for well over a year, from Marvel to Harry Potter. Fortnite remains one of the fastest to capitalize on new cultural moments, including a collaboration with Netflix breakout hit KPop Demon Hunters. Meanwhile, Free Fire appears to be repeating the same anime collaboration playbook in 2026, following its 2025 Naruto activations with Jujutsu Kaisen timed to Season 3 of the globally popular franchise.

MONOPOLY GO! x Harry Potter

Fortnite x KPop Demon Hunters



Free Fire x Jujutsu Kaisen

App Store Rankings Are a Hidden Battlefield

As total market downloads shrink, strong brands that drive organic downloads become even more valuable. While 2025's top games, Last War: Survival and Whiteout Survival, relied heavily on UA (user acquisition), they also benefited from names similar to high-traffic generic keywords. By contrast, Roblox benefits from strong branded search demand, with keyword traffic comparable to terms like "google" (8.9) and "tik tok" (9.5). Candy Crush Saga ranks #3 and also scores highly on major generic keywords such as "free games" and "games." Top games also rank strongly on competitors' branded searches, allowing them to capture organic traffic.

ASO Keywords 2.0 is Here
Sensor Tower's upgraded ASO Keywords report delivers faster, more reliable insight into organic performance across the market with Sense AI generated keyword suggestions.

Source: Sensor Tower Mobile App Insights
Note: iOS and Google Play combined. iOS only for China. Revenue is gross — inclusive of any percent taken by the app stores.

Top App Store Search Keywords by Downloads Driven (with Keyword Ranking)

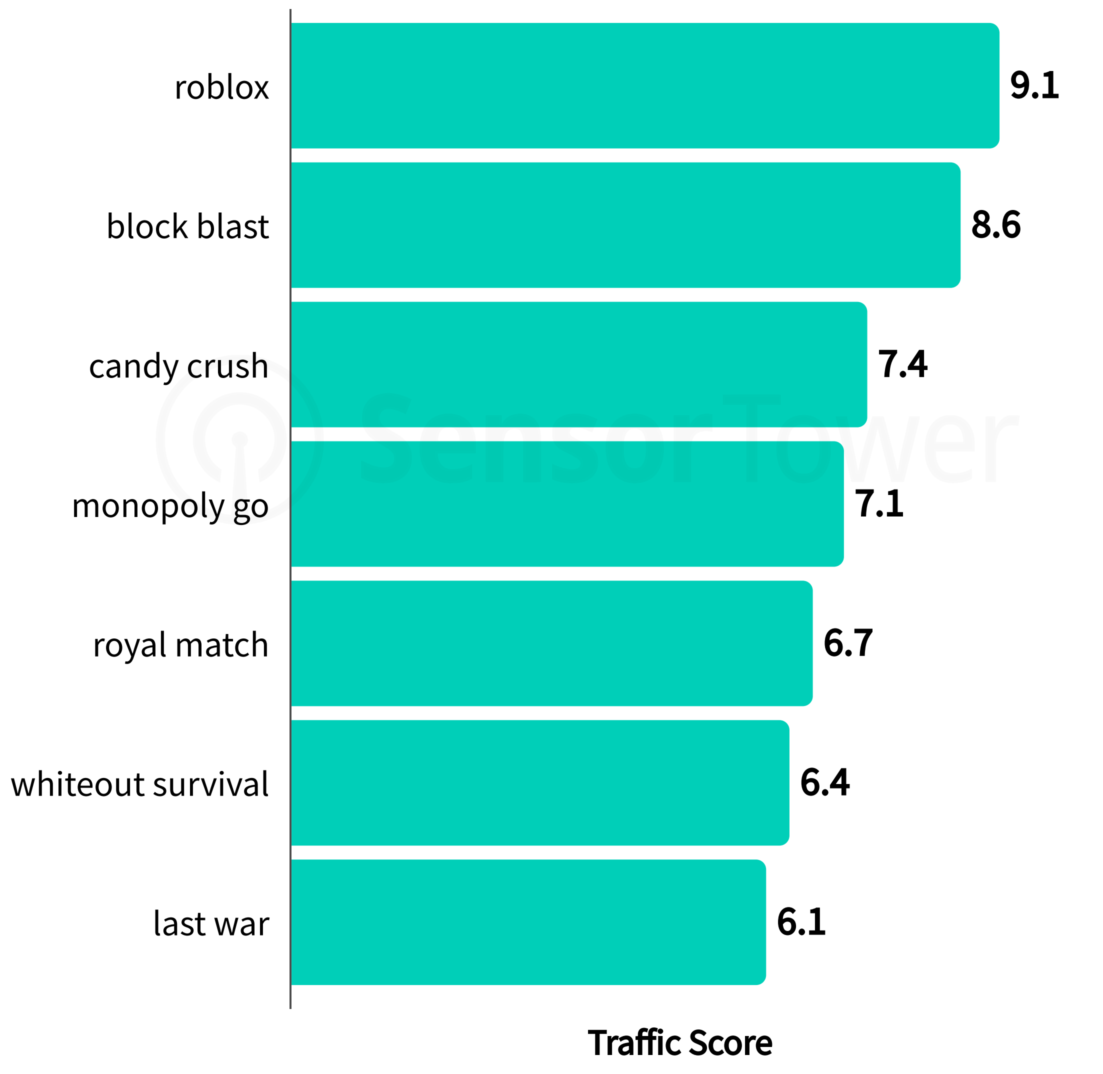
2025 US iPhone for Select Top Games

Overall | Generic Keywords | Competitor Keywords

Rank	Last War:Survival	Whiteout Survival	Roblox	Royal Match	MONOPOLY GO!	Candy Crush Saga	Block Blast!
1	war (1)	whiteout survival (1)	roblox (1)	royal match (1)	monopoly go (1)	candy crush (1)	block blast (1)
2	last war (1)	winter survival (1)	roblox studio (1)	royal (1)	monopoly (1)	free games (1)	block (1)
3	strategy games (5)	survival (2)	роблокс (1)	king (1)	大富翁 (1)	candy crush saga (1)	игры (1)
4	defense games (1)	survival games (2)	robux (1)	royal match save the king (1)	mo (2)	games (2)	blockblast (1)
5	last (1)	whiteout (1)	robux (1)	kings (1)	uno (6)	candy(1)	блок бласт (1)

Top Games' Branded Keyword by Search Traffic

2025 US iPhone



Apple Search Ads Is a Cross-Category Competition Layer

Using search ads to capture downloads at the point of intent is a strategy many top apps share. Search for Discord, a gaming-first social platform, and you see ads for Instagram, Fortnite, or TikTok. Fortnite is especially aggressive in bidding on other games' keywords, at times appearing more often for "roblox" than Roblox itself. While some games actively defend their keywords, such as MONOPOLY GO!, others don't bid on their own terms at all. On generic keywords, Dream Games dominates share of voice: Royal Kingdom captures 80%+ share of voice on "games" and "free games," while Royal Match ranks #1 by share of voice for "offline games" and "puzzle games."

Who Is Capturing Your Search Traffic?
Use Sensor Tower Apple Search Ads analysis tool to see who is bidding on your brand's keywords and identify opportunities to win share back.

Selected Top App Store Search Keywords for Top Games
2025 US iPhone, Ordered by Search Traffic (Left to Right)

Branded Keywords | Generic Keywords

Keyword Rank	discord		roblox		block blast		disney+		call of duty		free fire		subway surfers		monopoly go		royal match		fifa	
1	Instagram	44%	Fortnite	29%	Block Blast!	50%	Disney Emoji Blitz	43%	Fortnite	47%	Fortnite	47%	Fortnite	18%	MONOPOLY GO!	98%	Royal Match	81%	EA FC26	26%
2	Fortnite	6%	Roblox	22%	Color Block	32%	Disney Solitaire	11%	Viking Rise	8%	Whiteout Survival	4%	Block Blast!	13%			Piggy Kingdom	9%	Roblox	7%
3	TikTok	5%	Skins & Avatars...	11%	Wood Screw	2%	Paramount+	10%	Whiteout Survival	7%	Google	3%	Galaxy Attack	10%			Matching Story	3%	Fortnite	7%
4	Google	4%	Instagram	8%	Temu	2%	AMC+	4%	Lords Mobile	6%	Instagram	3%	Bubble Pop!...	7%			Vita Mahjong	2%	Dabble	4%
5	Google Gemini	4%	Temu	5%	Screwdom	1%	tubi	3%	Roblox	4%	Empires & Puzzles		Going Balls	6%			Match Villains	2%	TickPick	4%
6	Roblox	4%																		

05

PC/Console Market

PC/Console posted another strong year in 2025, with record momentum on Steam and continued demand across premium and free-to-play. Breakout hits proved that product resonance can still create outsized wins.

"We've been working with Sensor Tower for many years, and our experience has been consistently positive. Their platform helps us strengthen our understanding of the market, benchmark competitors, and improve our mobile products through store analysis, ASO, and marketing insights. This is especially important in mobile, where the landscape changes quickly and teams need clear, timely signals to make smart decisions. We also really appreciate how Sensor Tower continues to expand the platform with new features and capabilities, giving us fresh angles to explore and even more ways to refine our strategy."

Michael Reicher
CBDO
Wargaming

AAA and Indie Action See Most PC/Console Demand

2025 was a strong year for Action games across publisher classes, with indie titles such as R.E.P.O. and PEAK leading genre downloads. These games extend the wave of chaotic co-op play popularized by Lethal Company, pairing low-friction price points with gameplay designed for friend groups and creator-friendly moments. Indie games that generate creator clips were rewarded with AAA reach.

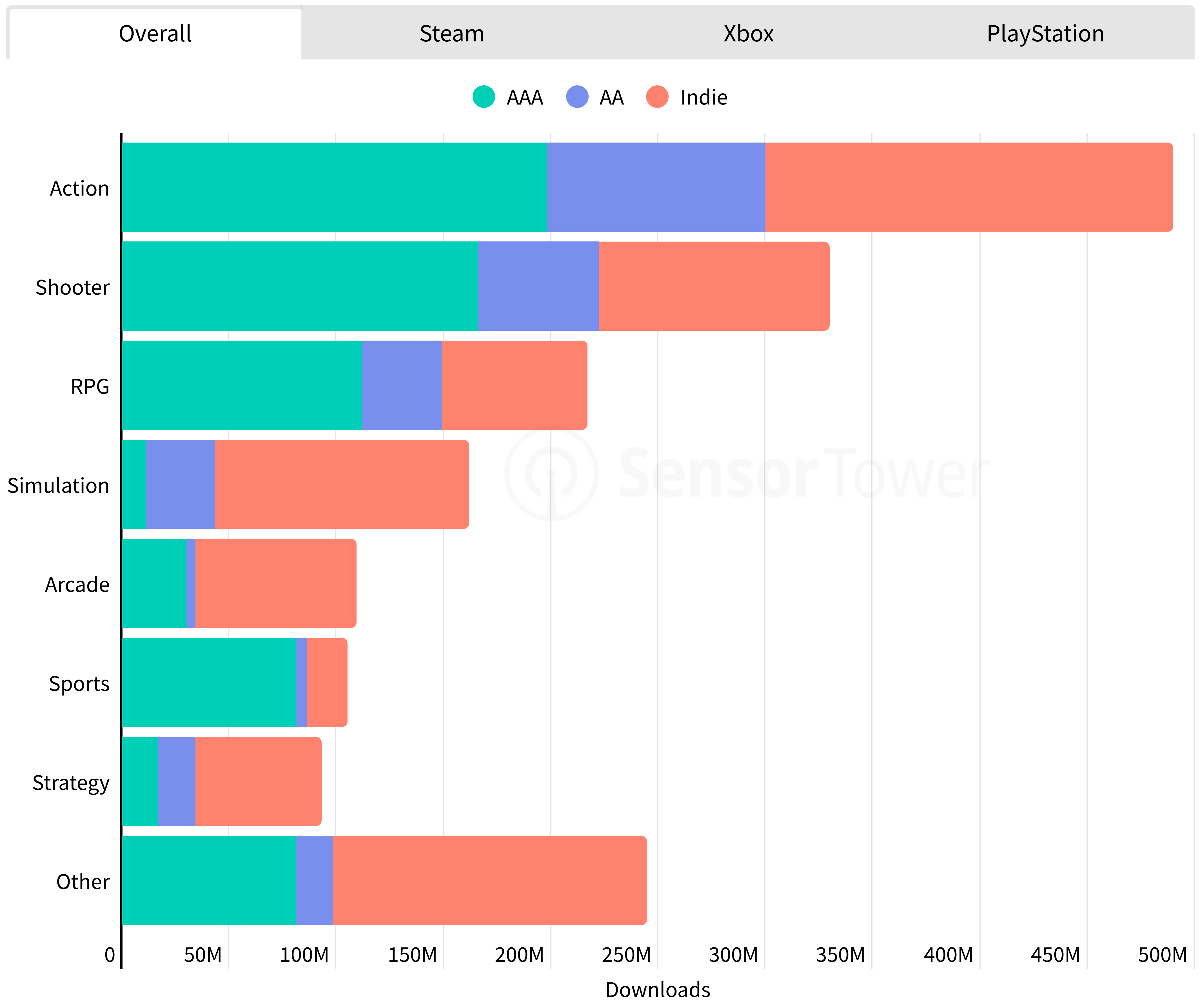
Shooter was the second most-downloaded genre, with new entrants such as Battlefield 6, Marvel Rivals, and Delta Force challenging dominant incumbents including Fortnite, Call of Duty, and PUBG.

Simulation also saw strong indie download performance for newer concepts such as Schedule I, Police Simulator: Patrol Officers, and Supermarket Together. Limited AAA focus so far may create an opening for larger publishers in 2026.

See the Top Performers.
Video Game Insights surfaces category leaders in Top Charts. Or, get into the weeds with the full Games Database.

Source: Video Game Insights
Note: Product model benchmarks are averages of top 25 games per product model by 2025 worldwide IAP revenue. Hypercasual is by 2025 Worldwide downloads.

PC/Console Downloads 2025 by Platform, Genre, Publisher Class



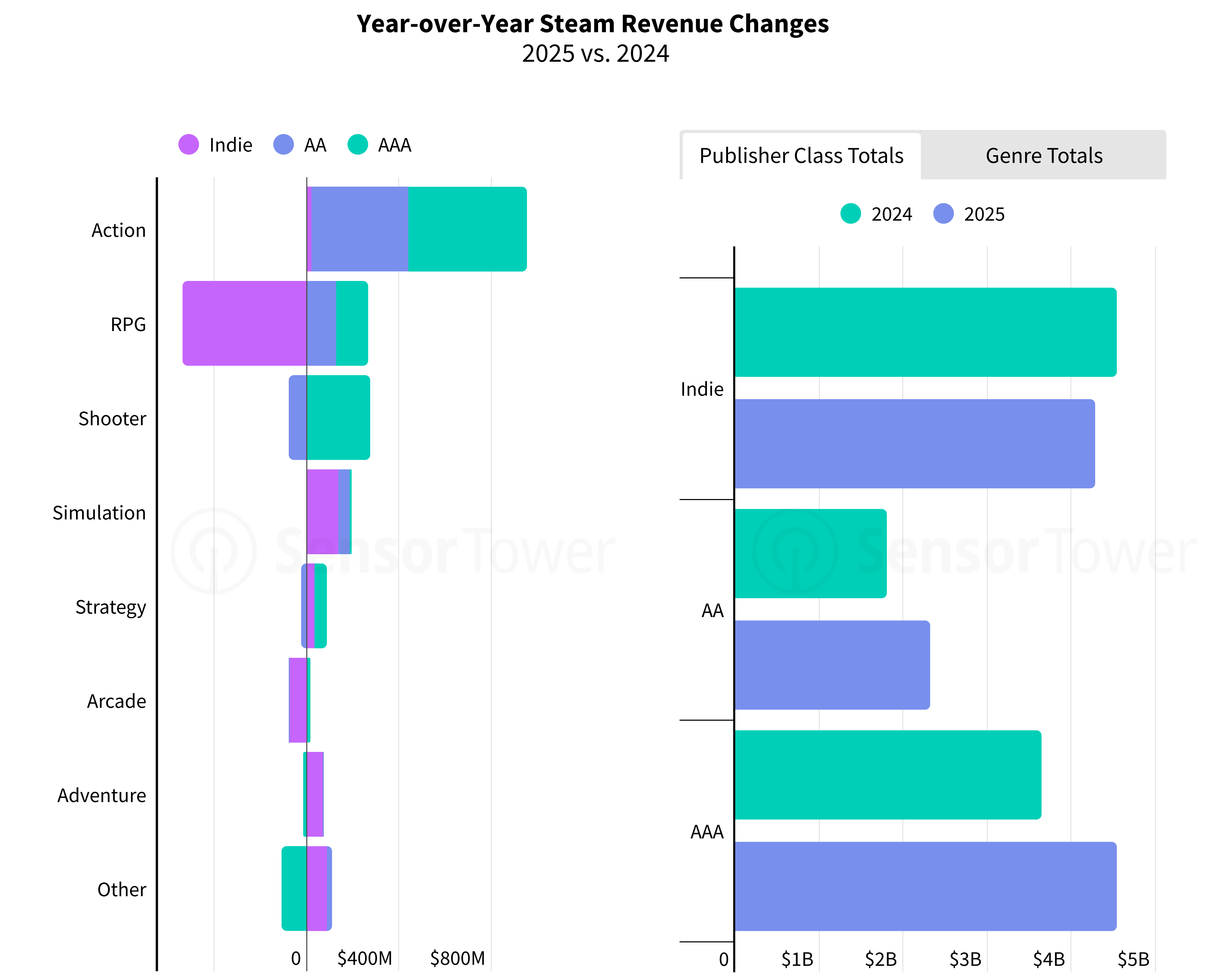
Steam Revenue Growth Was Concentrated in AAA Action

AAA Action games drove the most Steam premium revenue growth in 2025, with top performers including Split Fiction, Grand Theft Auto V Enhanced, and Red Dead Redemption 2. EA is leading the two-player co-op category with Split Fiction and It Takes Two, but it is notable that the #2 and #3 titles are games that originally launched years ago.

At first glance, Indie performance may look lackluster, but 2024 Indie publisher revenue was up 77% vs. 2023, making 2025 an excellent year in historical context. In addition, RPG was the main drag on Indie growth versus 2024, largely due to Black Myth: Wukong, which was the #1 game by Steam revenue in 2024. Excluding Black Myth: Wukong, Indie games grew 12% in 2025.

AA also had an excellent year, led by ARC Raiders, Clair Obscur: Expedition 33, and Ready or Not. Several AA games this year combined sales success with critical acclaim, signaling room for further AA expansion in 2026.

Source: Video Game Insights

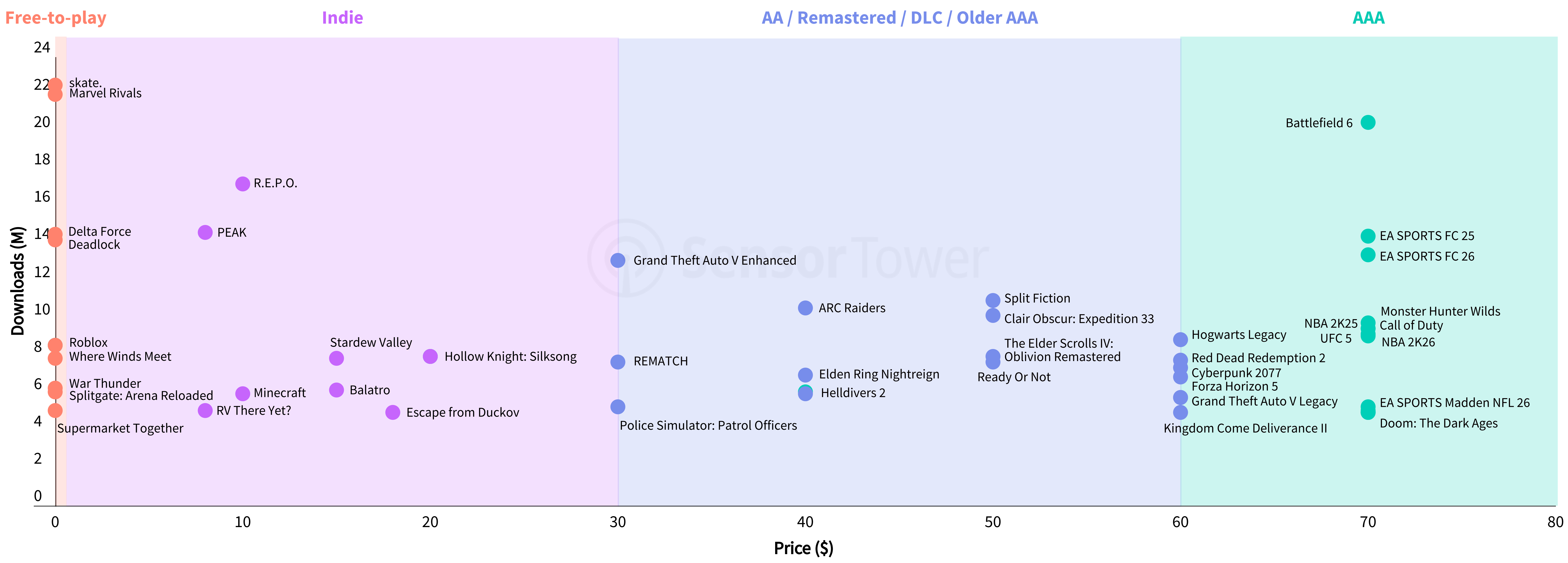


Battlefield 6 is the Best-Selling Game of the Year

Battlefield 6 was the best-selling PC/Console game of 2025. The #2 and #3 AAA titles by units sold, EA SPORTS FC 25 and EA SPORTS FC 26, together outsold Battlefield 6, highlighting EA SPORTS FC's sustained scale across annual releases. On the free-to-play side, skate. ranked #1 by downloads, followed closely by Marvel Rivals, with Delta Force and Deadlock at #3 and #4.The #2 and #3 best-selling games overall were R.E.P.O. and PEAK, reinforcing the rise of chaotic co-op, creator-friendly gameplay. Combined with Battlefield 6 and ARC Raiders, this points to an especially competitive year for PC/Console shooters. Focusing on mid-priced games, Grand Theft Auto V Enhanced, Split Fiction, ARC Raiders, and Clair Obscur: Expedition 33 were major breakout hits.

Source: Video Game Insights

Top PC/Console Games by 2025 Downloads with Price



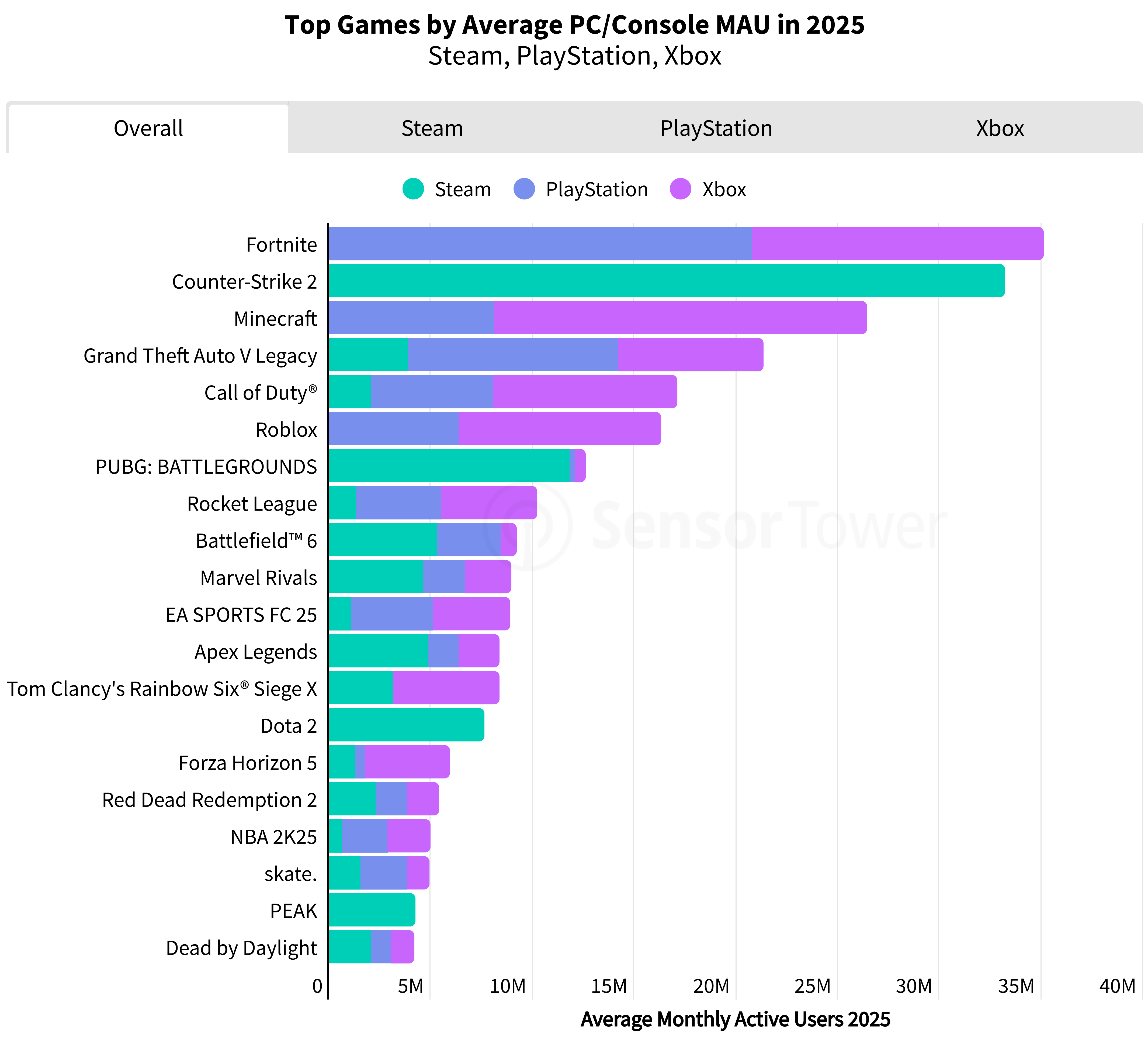
Fortnite Remains King of PC/Console

Fortnite on console alone still has the largest player base of any PC/Console game. Counter-Strike 2 comes close despite being available only on Steam. The top eight are all dominant incumbents, with Battlefield 6 and Marvel Rivals capping off the top 10 despite recent launches. Indie title PEAK also made the top 20, ahead of Dead by Daylight.

Comparing platform leaders highlights each platform's distinct audience. Counter-Strike 2, PUBG, and Dota 2 lead Steam, while Battlefield 6 ranks #4 and Marvel Rivals ranks #6, with PEAK and R.E.P.O. at #7 and #8. It is no surprise that Steam is the de facto home of indie games, but Steam players also appear more open to newer releases, allowing new launches to climb more easily than on console.

PlayStation and Xbox rankings look closer to the usual incumbent suspects, though Microsoft-owned Minecraft tops Xbox, ahead of Fortnite. EA SPORTS FC titles are also more prominent on PlayStation than Xbox or Steam.

Source: Video Game Insights



Social Channels Are the Default for PC/Console

Social channels offer the scale PC/Console launches and live-service games need, along with access to older-skewing gaming audiences with higher disposable income and the targeting tools required to reach them efficiently.

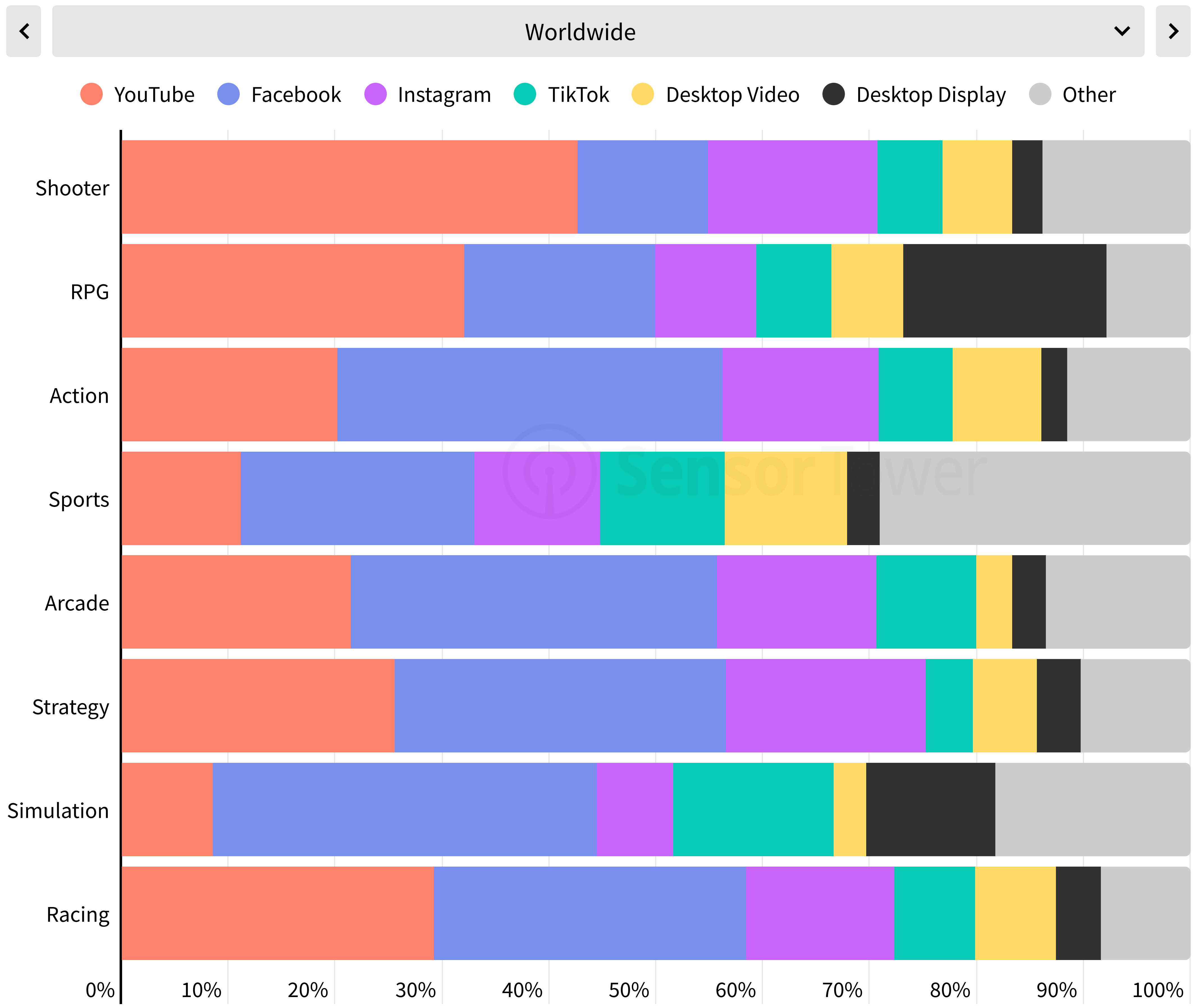
YouTube remains the default channel for PC/Console advertising as the de facto home of gaming audiences. While YouTube Shorts continues to grow, there are still few real substitutes for long-form video, which attracts highly valuable audiences more likely to spend on PC/Console games.

Meta's Facebook and Instagram are also core channels, combining large gaming audiences with strong performance tooling. Creative assets such as key art, cinematics, IP, and critic reviews translate well to in-feed formats.

Advertising Insights For Your Niche
Download competitors' channel mix strategies with Pathmatics. See how top performers differentiate themselves in user acquisition.

Source: Sensor Tower Pathmatics
Note: Worldwide includes 29 markets. Channels available vary by market.

PC/Console Game Ad Channel Spend Share in 2025



PC/Console Market

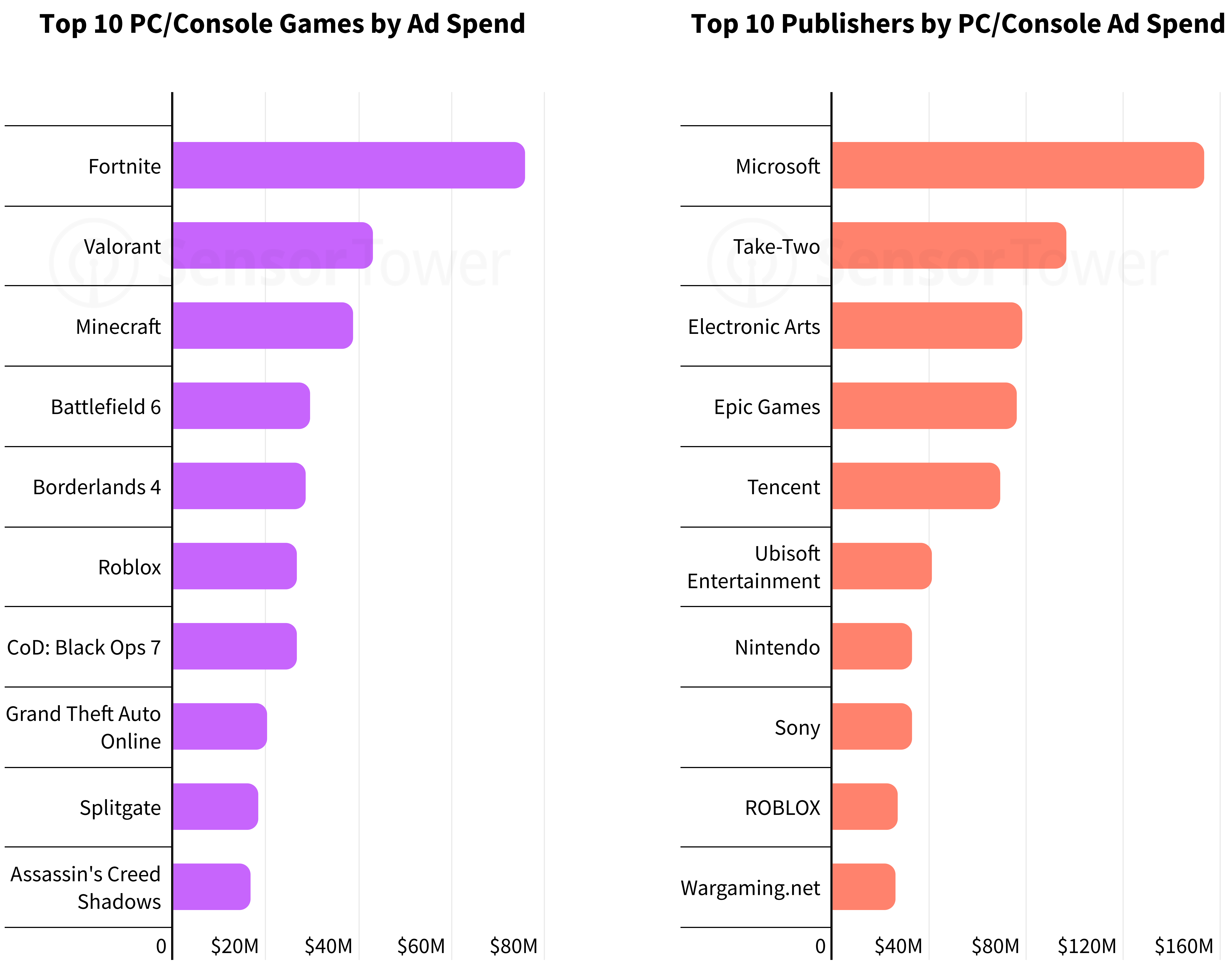
Fortnite, Microsoft Spent the Most on Ads in 2025

There are many reasons Fortnite has the largest PC/Console player base, but the scale of its advertising campaigns is a key one. Fortnite PC/Console ad spend peaked in June, coinciding with Fortnite Super, a DC Comics collaboration featuring Superman and other heroes.

The only new games to rank in the top 10 by ad spend in 2025 were Battlefield 6, Borderlands 4, and Call of Duty: Black Ops 7: all shooters.

On the publisher side, Microsoft spent the most on advertising across its portfolio, with Minecraft driving the most spend of any game. Take-Two and Electronic Arts ranked #2 and #3, respectively.

Overall



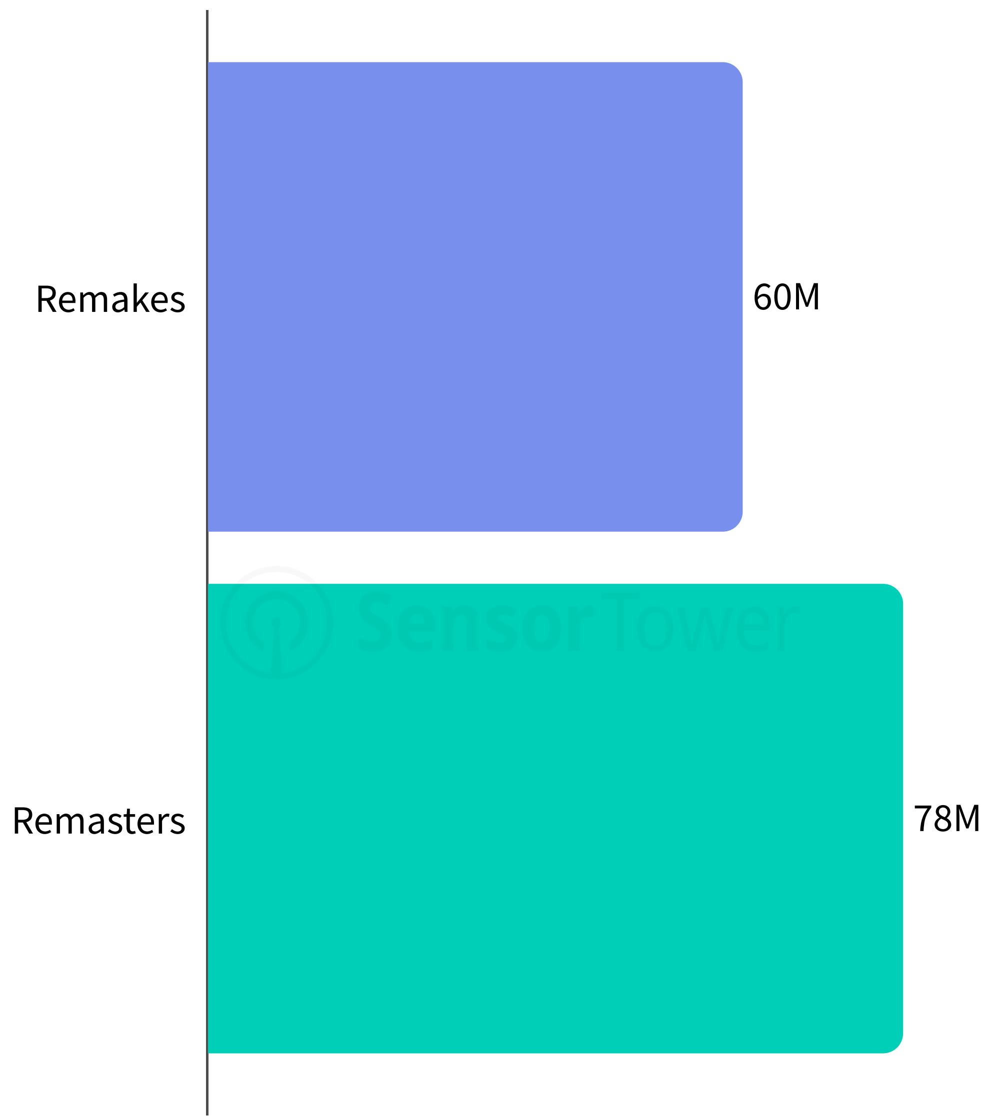
Source: Sensor Tower Pathmatics
Note: Worldwide includes 29 markets. Channels available vary by market.

Remasters and Remakes Ride the Nostalgia Wave

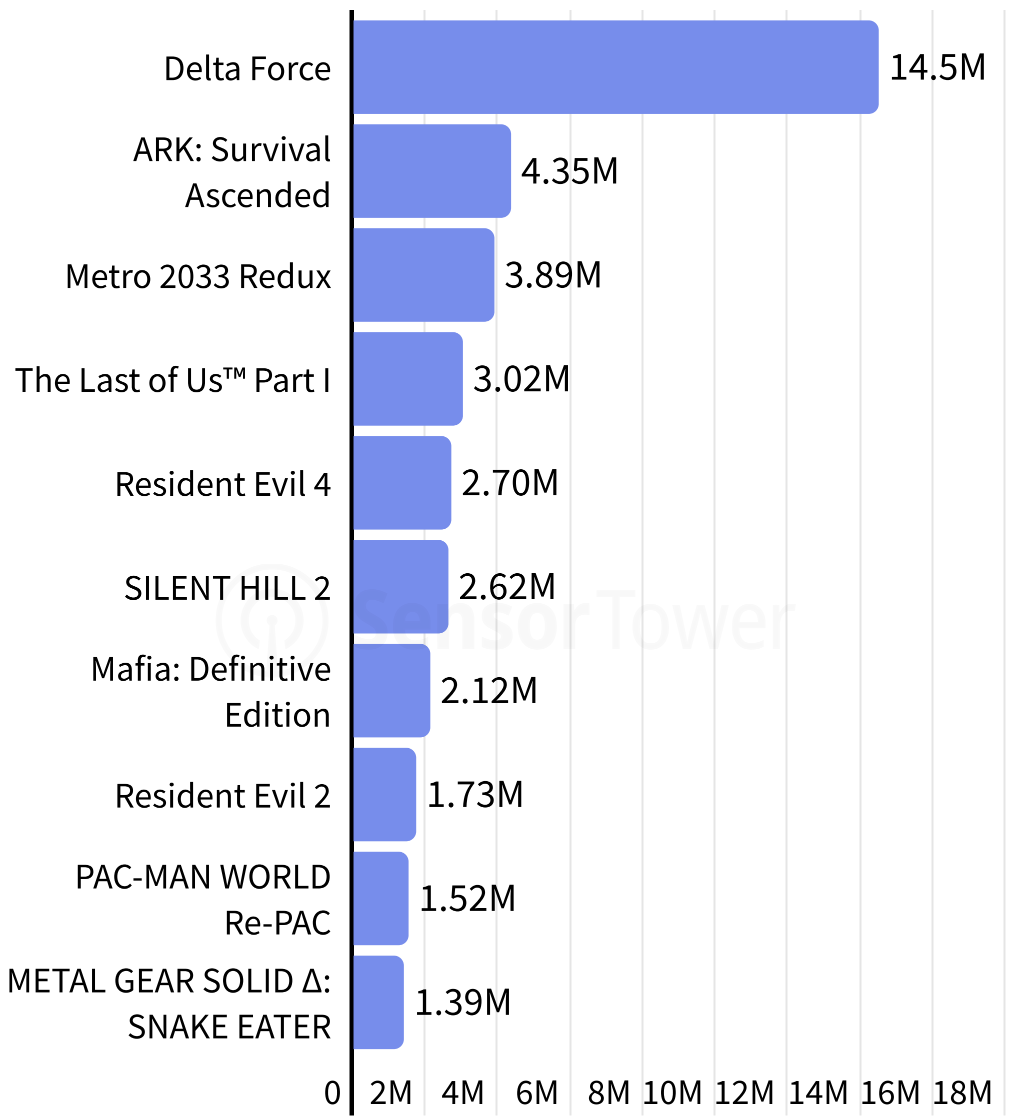
There is no shortage of players eager to revisit older games, and 2025 download performance suggests they are willing to spend on updated versions. Remakes and remasters were downloaded 138M times in 2025. Delta Force stands out as the only free-to-play title in this group, and the most downloaded. Grand Theft Auto V Enhanced was the best-selling remake/remaster, bringing an updated experience to GTA's massive audience.

Source: Video Game Insights

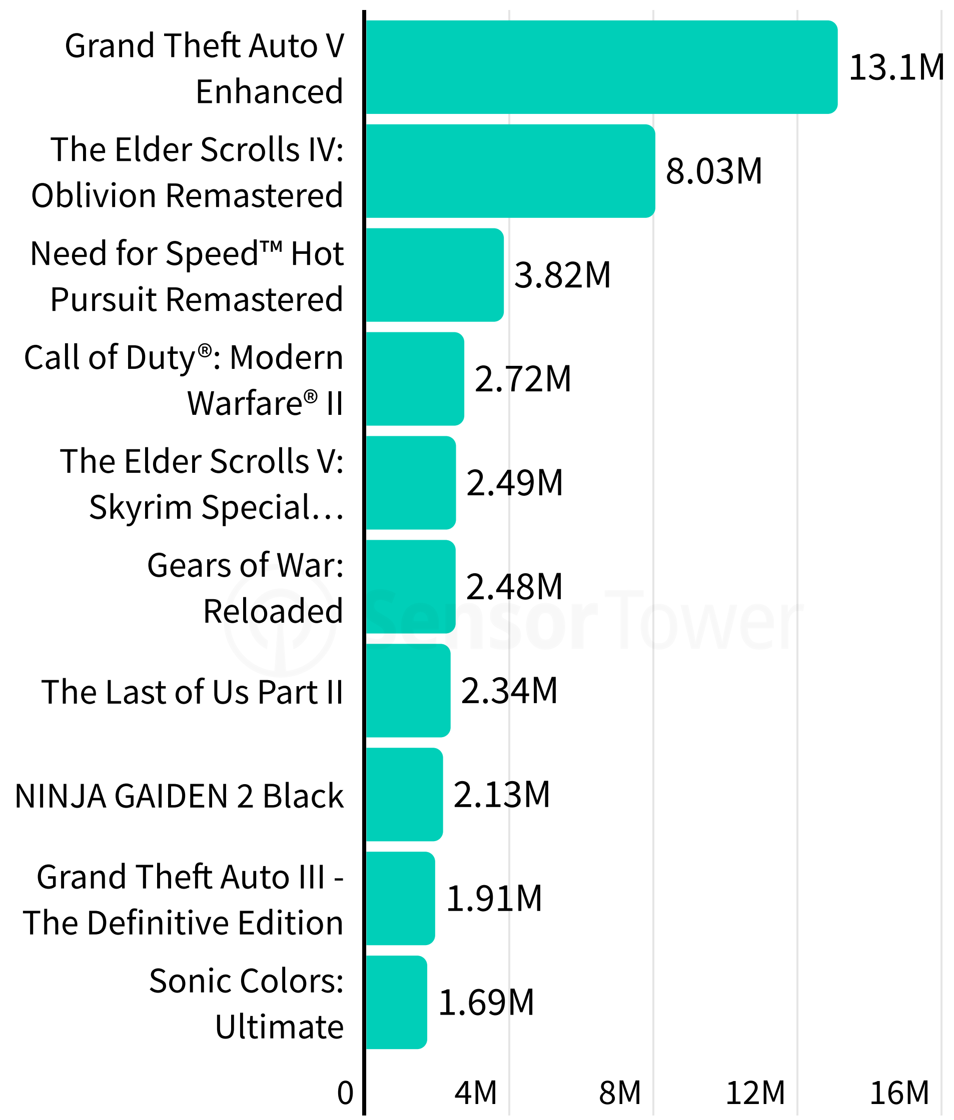
Remake/Remaster Downloads in 2025



Top Remakes by 2025 Downloads



Top Remasters by 2025 Downloads



PC/Console Market

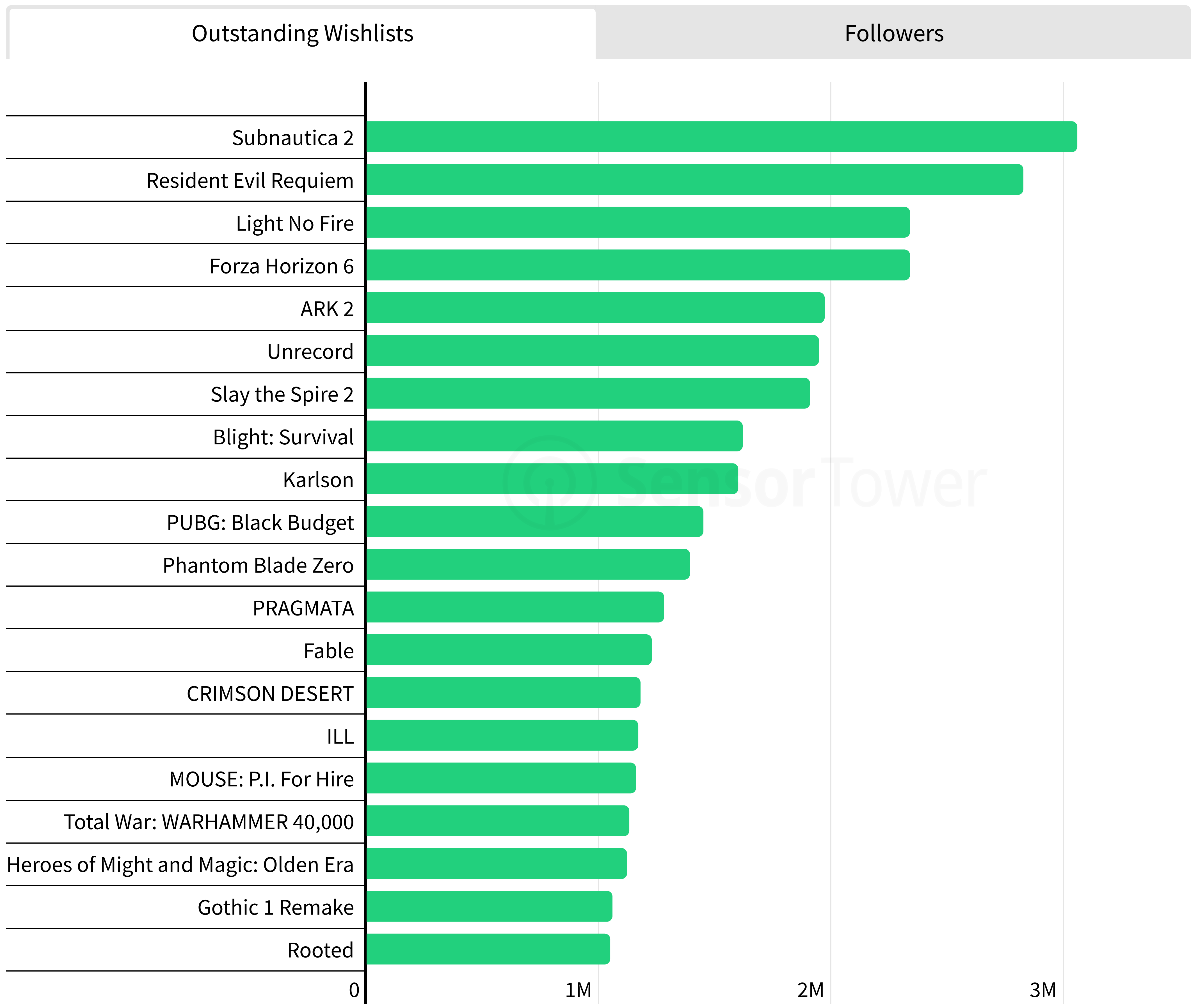
Subnautica 2, OKU the Next Steam Games to Watch

The wishlist leaders are driven by established franchises and headline reveals, with Subnautica 2, Resident Evil Requiem, Light No Fire, and Forza Horizon 6 defining the top tier. Just below, the mix of ARK 2, Unrecord, Slay the Spire 2, Blight: Survival, and PUBG: Black Budget shows that “familiar loop plus a strong hook” is still the most consistent path to pre-launch intent across very different genres.

Followers shifts toward community momentum and ongoing visibility: OKU stands out as follower-led, alongside engagement-heavy projects like Operation Lovecraft: Fallen Doll, Paralives, and Karlson. Titles that place strongly in both tables, including Subnautica 2, Light No Fire, Forza Horizon 6, ARK 2, Unrecord, Heroes of Might and Magic: Olden Era, Blight: Survival, and Rooted, look best positioned to convert both broad awareness and sustained interest into launch outcomes, while the gaps highlight where demand is more “brand-driven” (wishlists) versus “community-compounding” (followers).

Source: Video Game Insights

Top Unreleased Games by Outstanding Wishlists, Followers



06

Case Study: PC/Console Shooters

2025 was a defining year for PC/Console shooters, with major new launches entering a category still dominated by entrenched live-service giants. Flat downloads made competition for players especially intense.

"With its 23 years of game development, Frima understands that long-term success depends on the continuous evolution of work methodologies. Sensor Tower has played a key role in helping us shift and adjust our strategy by bringing clarity to market opportunities, competitive dynamics, monetization models, and player sentiment through relative trend insights. This data-influenced approach allows us to reduce risk, adapt faster, and move forward with confidence while respecting players' expectations for top-quality games."

FRIMA

Fred St-Amour
Studio Director, Product and Creative
Frima

Case Study: PC/Console Shooters

2025 was a Huge Year for Shooters

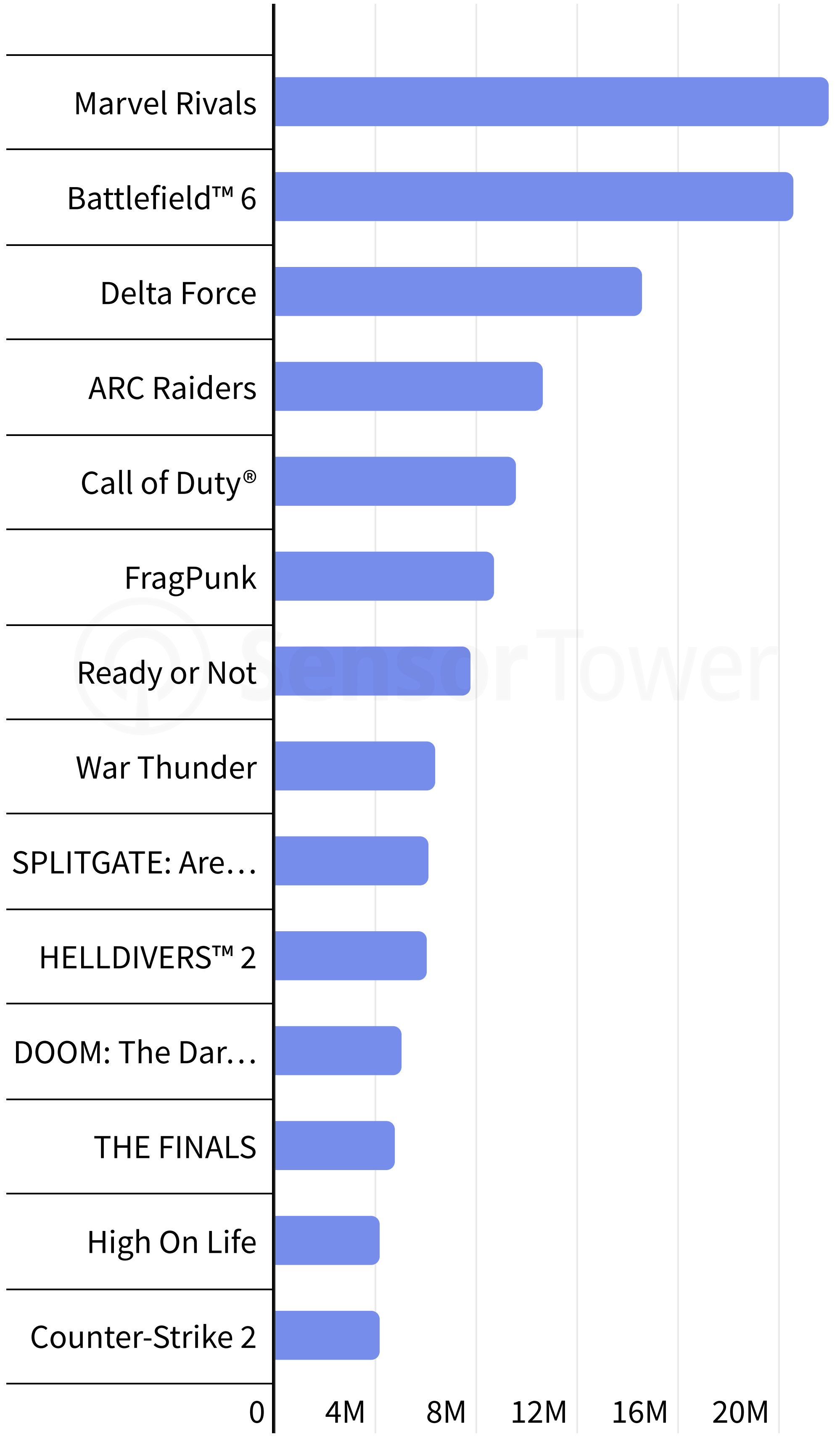
Despite dominant incumbents such as Fortnite and Call of Duty, PC/Console shooters saw significant upheaval in 2025. EA's Battlefield 6 became the best-selling game of 2025 with an earth-shattering launch. Meanwhile, NetEase and Tencent entered the free-to-play shooter market with Marvel Rivals and Delta Force, respectively. ARC Raiders was a massive AA success, becoming the fourth most-downloaded shooter and the #12 shooter by average MAU in 2025.

Despite these high-profile new entrants, Fortnite remained the clear leader by player count, followed by Counter-Strike 2 despite being available only on Steam. Call of Duty also held a strong #3 position, followed by PUBG.

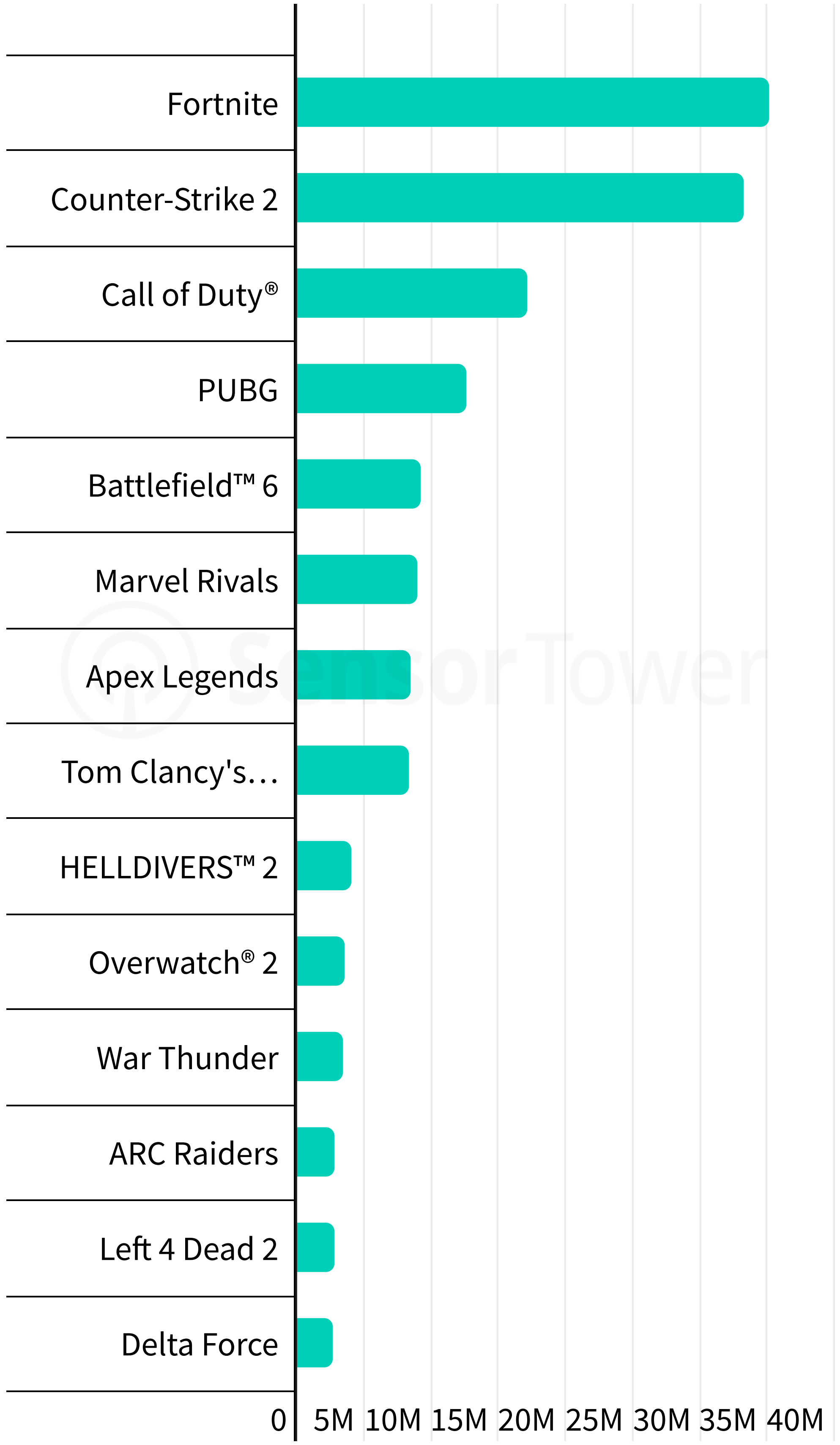
Virtually every major publisher either already has a top-tier shooter or is trying to enter the market. Even so, Steam shooter downloads declined in 2025 versus 2024, making the category ultra-competitive.

Source: Video Game Insights

Top Shooters by 2025 PC/Console Downloads



Top Shooters by 2025 PC/Console MAU



Case Study: PC/Console Shooters

The West is the Primary Shooter Battleground

More than half of players in Battlefield 6, Call of Duty, ARC Raiders, and Marvel Rivals are based in the US.

Europe is the #2 region for most top shooters and has the largest share of Counter-Strike players.

Counter-Strike 2 and Delta Force stand out for their significant player bases in Asia, particularly China, and relatively lower US player shares. These two titles also have the largest shares of South American players, especially Delta Force.

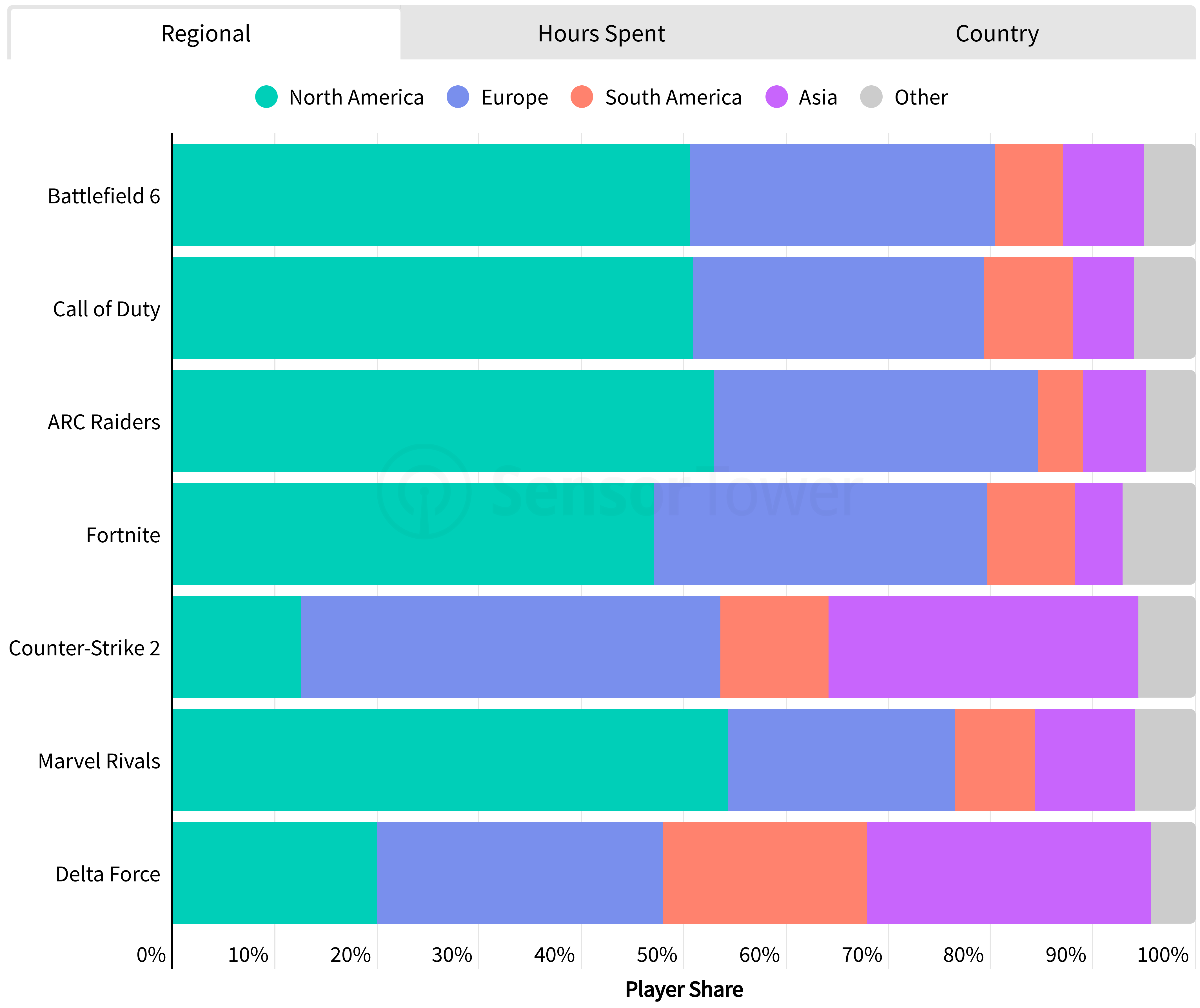
Looking at hours played, established titles such as Call of Duty, Fortnite, and Counter-Strike have the largest shares of highly engaged players with more than 100 hours in-game. However, ARC Raiders stands out among new launches, with about one-fifth of players already above 100 hours despite a late-2025 launch, suggesting elite early retention and engagement.

Understand Your Audience

VGI lets you see how many games your and your competitors' players own and wishlist. Age and gender coming soon!

Source: Sensor Tower Video Game Insights
Note: Regional and Country do not include Xbox. Fortnite is not on Steam; Counterstrike is only on Steam.

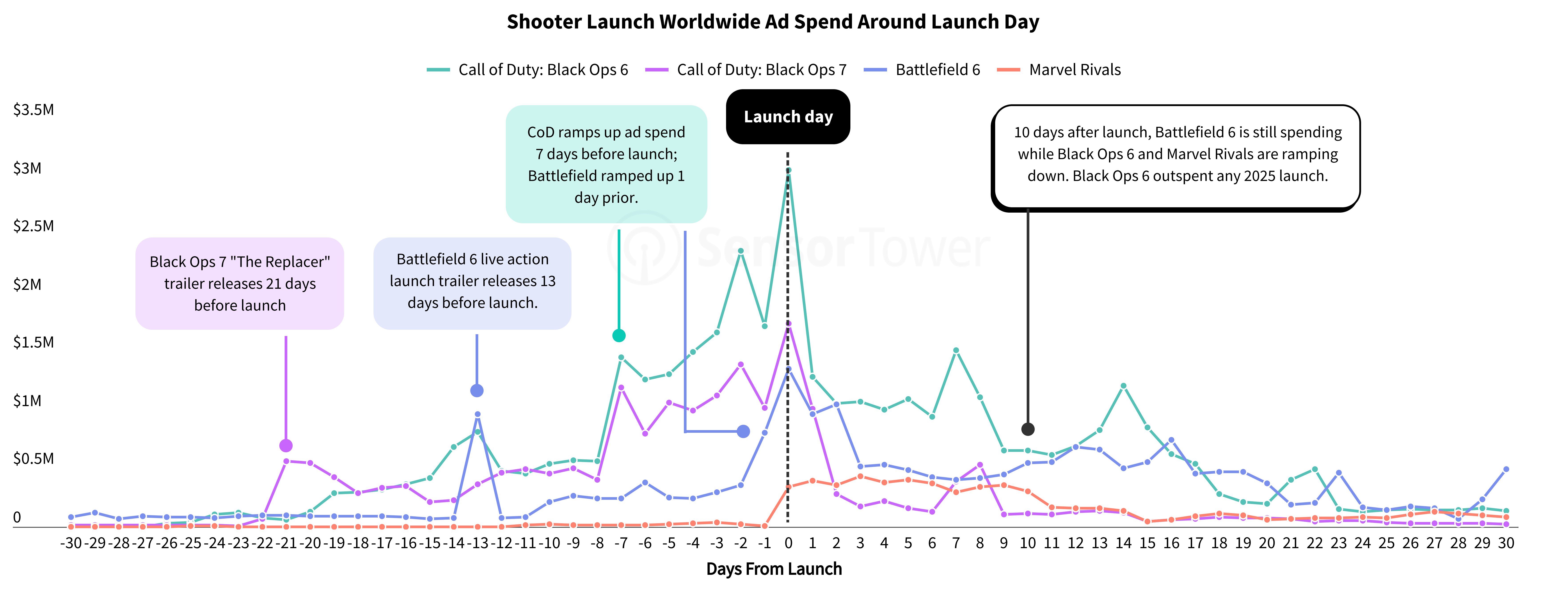
Top Shooter Player Breakdown



Battlefield 6 Had the Strongest Post-Launch Ad Spend Momentum

Comparing ad spend around launch, Battlefield 6 combined a strong push in the two weeks before release with the standard launch-day spike, then sustained stronger post-launch momentum than Call of Duty: Black Ops 7. Black Ops 7 showed a heavier pre-launch ramp but a faster post-launch decay. Call of Duty: Black Ops 6's 2024 launch was significantly larger than either title by ad spend. Marvel Rivals followed a different strategy, with spend turning on at launch and then decaying starting around nine days later.

Source: Sensor Tower Pathmatics
Note: Worldwide includes 29 markets. Channels available vary by market.



Case Study: PC/Console Shooters

Battlefield 6 Employed Unique Channel Mix

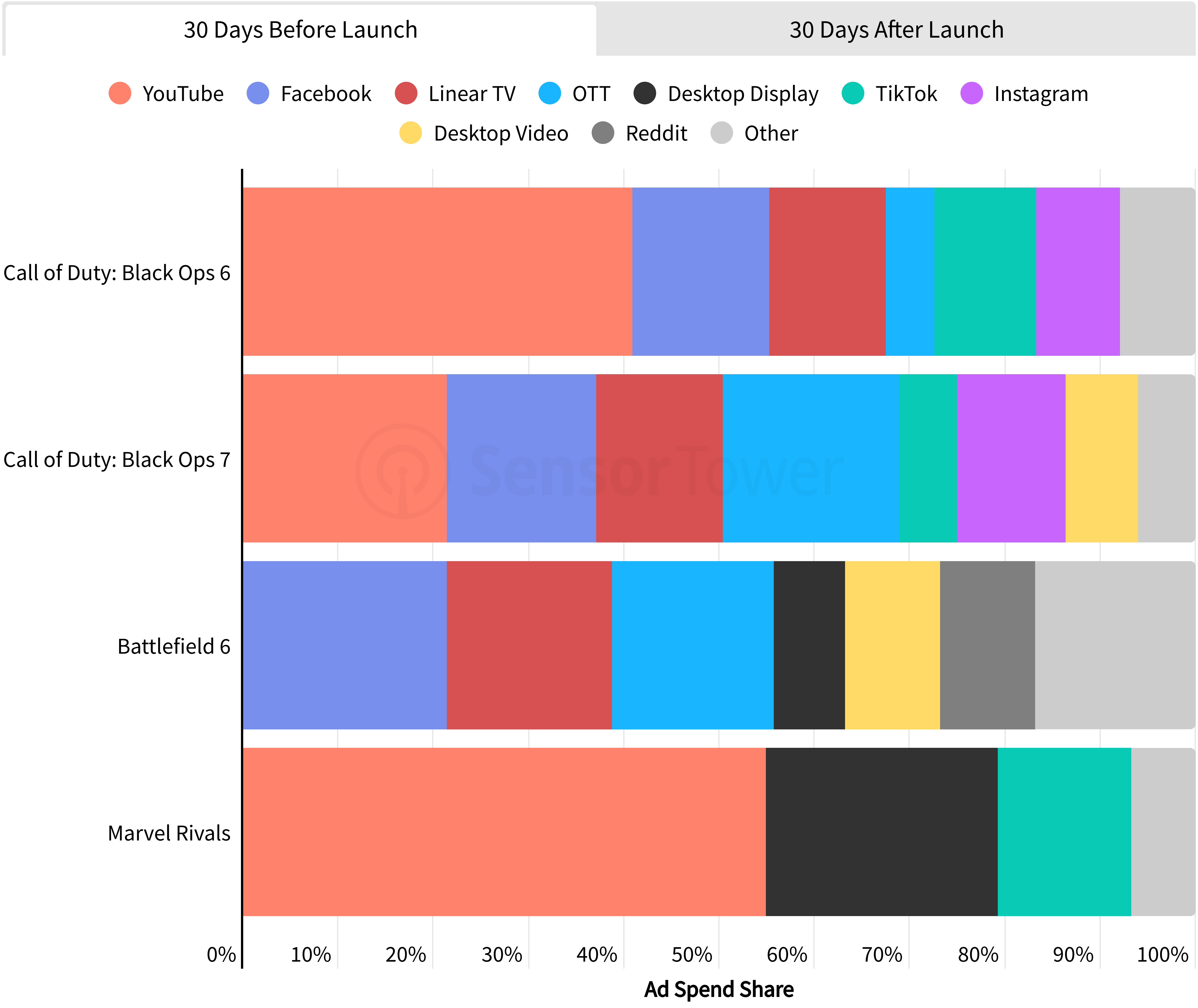
Battlefield 6's pre-launch channel mix differed meaningfully from recent Call of Duty launches. Relative to CoD, Battlefield 6 leaned more heavily on Facebook, Reddit, and desktop display, and less on YouTube, TikTok, and Instagram.

In the 30 days after launch, YouTube emerged as a primary channel for Battlefield 6, while spend remained active on Reddit and Instagram. TikTok continued to account for less than 5% of ad spend.

At first glance, deprioritizing video-heavy social platforms for a AAA title built around cinematic, large-scale combat may seem counterintuitive. However, the campaign's channel mix appears aligned with audience targeting: the primary channels used, including Facebook, linear TV, OTT, and Reddit, skew toward older male audiences rather than younger, more viral-oriented audiences on TikTok and Instagram.

Source: Sensor Tower Pathmatics
Note: Worldwide includes 29 markets. Channels available vary by market.

Top Shooters Worldwide Channel Mix



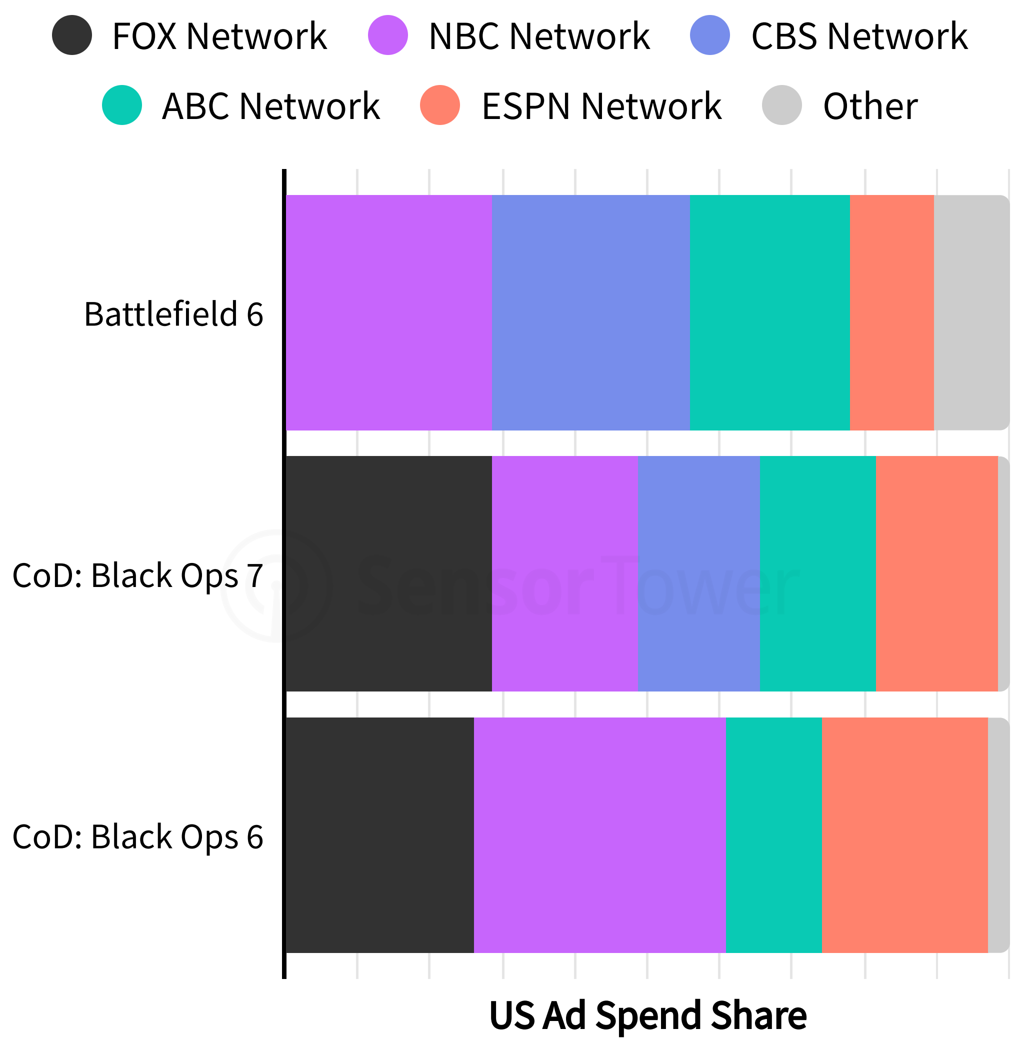
Case Study: PC/Console Shooters

Battlefield 6 and CoD Took Different Channel Approaches

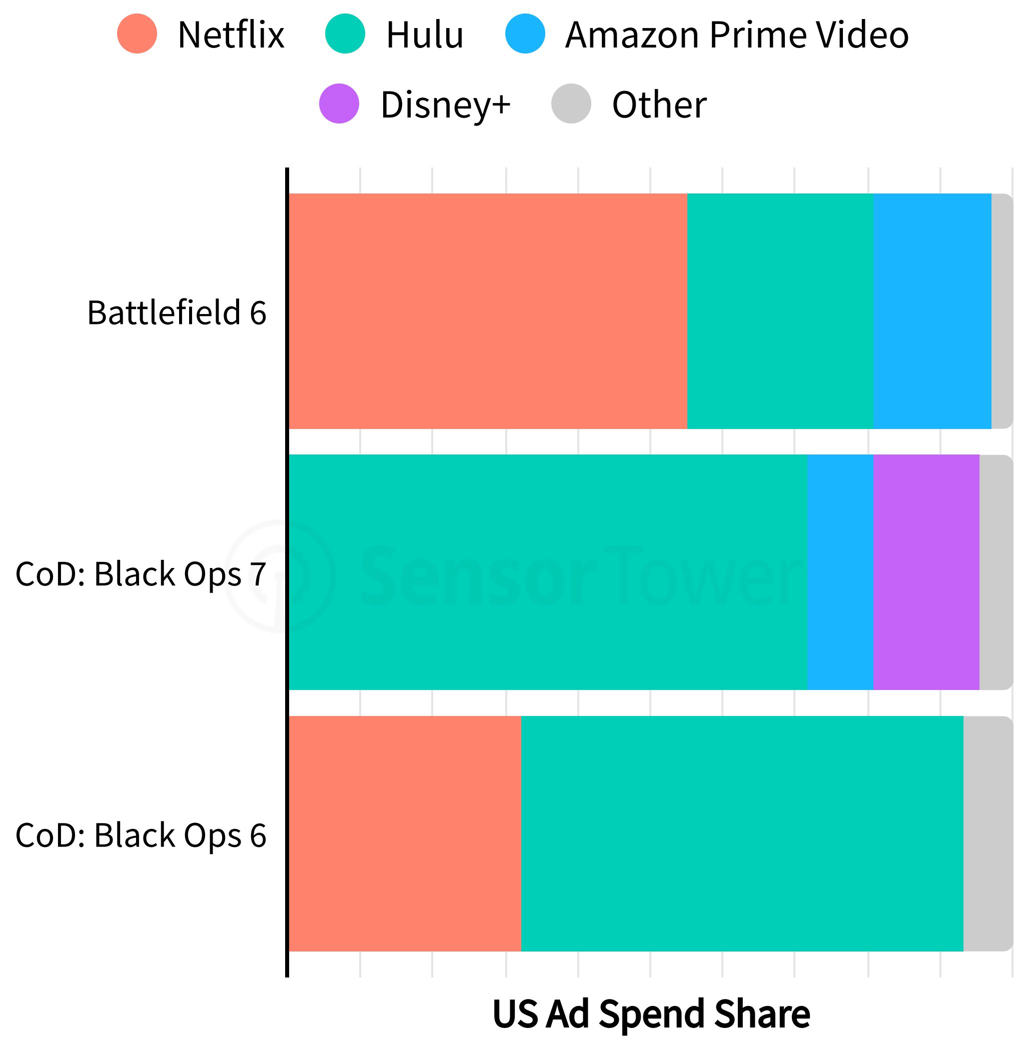
Battlefield 6 also differed from recent Call of Duty launches in linear TV, OTT, and desktop video. In linear TV, Battlefield 6 did not spend on FOX, unlike recent CoD launches, and instead spread spend more broadly across NBC, CBS, and ABC while allocating a larger share to other placements. OTT is more mixed: Black Ops 6 spent on Netflix, Black Ops 7 did not, and Battlefield 6 did. In desktop video, Call of Duty prioritized Twitch, while Battlefield 6 leaned more heavily on Fandom.

Source: Sensor Tower Pathmatics
Note: Webstores defined as domains and paths in the Gaming category that contain 'store'. Roblox 's '/catalog' and '/upgrade' paths added as an exception.

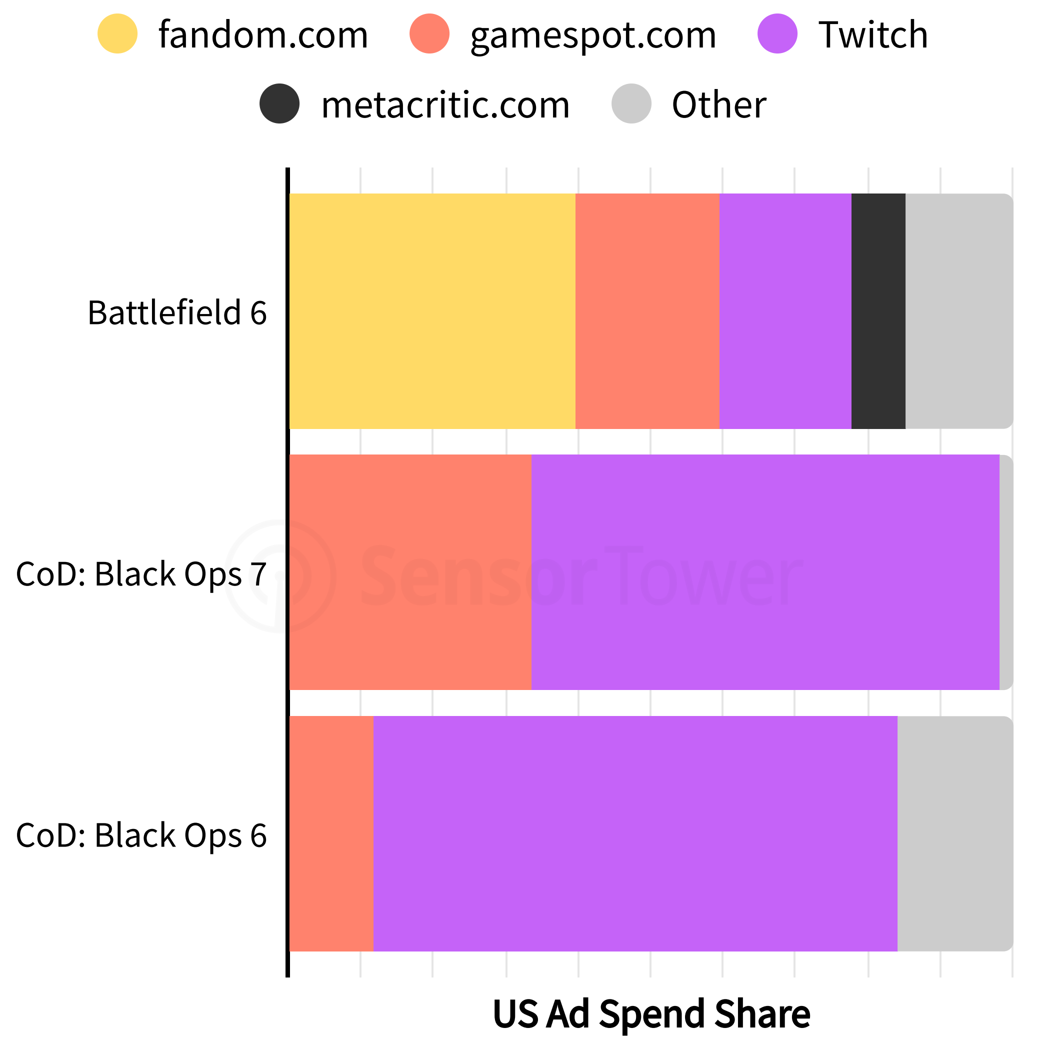
US Linear TV Ad Spend by Publisher



US OTT Ad Spend by Publisher



US Desktop Video Ad Spend by Publisher



Case Study: PC/Console Shooters

Battlefield and Call of Duty Creative Strategies Diverged

Battlefield 6's top US ad by spend was a cinematic trailer with a celebrity hook. The creative satirizes celebrity-led ads by blowing up the featured celebrities seconds in, then pivoting to live-action explosions and large-scale environmental destruction. Black Ops 7's top creative used humor while showcasing the new D.A.W.G. robot dog scorestreak, a clear departure from Black Ops 6's campaign, which leaned more heavily on review-driven messaging and gameplay visuals.

See Top PC/Console Creative
Pathmatics shows you the top creative in each market by ad spend in PC/Console, broken down by genres, subgenres, and specific games.

Source: Sensor Tower Pathmatics
Note: Channels vary by market.

Battlefield 6 #1 Ad by 2025 US Ad Spend
Linear TV
Top Publishers: CBS, ABC

CoD: Black Ops 7 #1 Ad by 2025 US Ad Spend
Linear TV
Top Publishers: NBC, ABC, Peacock, Hulu

CoD: Black Ops 6 #1 Ad by 2025 US Ad Spend
Linear TV
Top Publishers: NBC, ESPN, FOX, ABC, TNT

Cohort defined as events with "Offer: non-standard as primary mechanic, tagged with Milestone rewards and Accumulation tags.

07

Appendix

"Sensor Tower has saved our teams countless hours. What used to take days of manual research now takes minutes. Cross-department discussions (UA, product, exec) are aligned on one source of truth, which greatly reduces friction in decision-making."

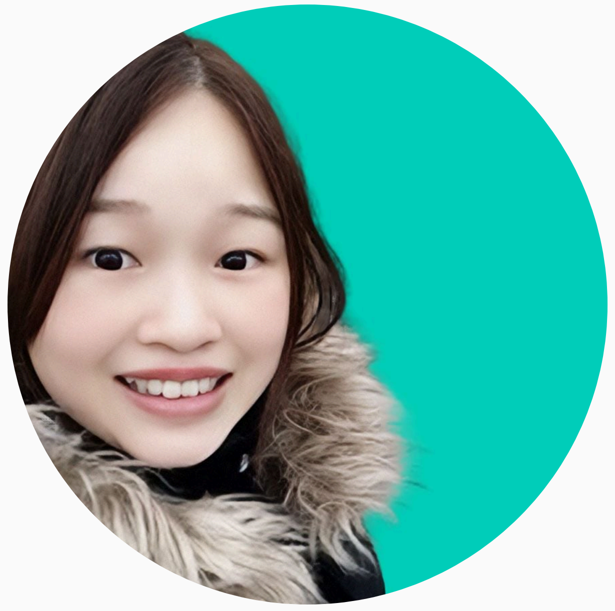
Türker Karahan
CEO
UDO

Meet the authors

Sam Aune
Lead Gaming Insights Analyst

Sam leads Sensor Tower's gaming insights and market analyses across mobile, web, and console. He is the primary author of many Sensor Tower's flagship gaming reports, including this report.

Favorite Game in 2025: Clair Obscur: Expedition 33



Yuwen Huang
Senior Market Insights Analyst

Yuwen has been analyzing the digital economy since 2021, specializing in digital advertising and non-game verticals including Retail, Streaming, and Food & Drink. She is the lead analyst for Sensor Tower's reports including the State of Food Delivery & Rideshare and the quarterly Digital Market Index.

Favorite Game in 2025: Just Dance

Jonathan Briskman
Director, Market Insights

Jonathan leads Sensor Tower's Market Insights team, covering trends across the digital economy, from mobile and web to digital advertising. Since 2018, he has helped shape Sensor Tower's market research, including reports such as the State of AI Apps and the State of Digital Advertising.

Favorite Game in 2025: Mario Kart World

A special thanks to Anthony Bartolacci, Chirag Ambwani, Karl Kontus, Harry Nõmmann, Sandra Wyszomirska, Krystel Bitar, Sean Patel, Lucy Greider, Anthony Devine, Vic Bassey, and Bryan Isagholian.

Sensor Tower

About Sensor Tower

Sensor Tower is a global provider of digital intelligence solutions, empowering companies to understand consumer behavior and market performance across mobile apps, digital platforms, and gaming ecosystems. Headquartered in San Francisco, Sensor Tower's insights are trusted by more than 2,500 enterprises worldwide.

For more information, visit sensortower.com.

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