

appfigures

Mobile Games in 2025

Trends & Strategies Supercharging Revenue Growth



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Randy Nelson
Head of Insights

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Email them to **insights@appfigures.com** and they will help inform the direction of our research publications going forward.

These Figures and Trends Define the Mobile Game Market in 2025

Mobile gaming remains one of the most competitive and creatively diverse categories in the app economy — but understanding what drives success takes more than a glance at app store charts. In this report, **we analyze the top 1,000 earning mobile games** using a refined genre and subgenre taxonomy to map the current structure of a market **where Mid-Core titles dominate,** with RPG genre titles leading the pack. We also examine **how IP collaborations drive meaningful revenue lifts, which ad networks are most prevalent among top games,** and insights such as **how the largest non-game apps are increasingly sharing users with hit titles.** Finally, we spotlight the markets where **the next wave of mobile game growth is already taking shape.** But first, we'll start with a fresh **examination of the mobile games market** based on Appfigures data. Let's dive in.

01

The Mobile Games Market in Numbers

How large is the modern mobile game market? The simple answer is "very"—but the figures supporting that fact are contained in this first section of our report.

You'll also find other key insights and metrics, such as top markets for consumer spending, alongside measurements that show which year's releases are generating the most revenue, how many games are launching annually, and more.

2024

Top Markets by Consumer Spending
App Store & Google Play

Rank	Country	Consumer Spending
1	United States	$20.8B
2	China*	$13.4B
3	Japan	$8.9B
4	South Korea	$3.5B
5	Germany	$2.4B

*iOS Only | Source: Appfigures Explorer

2024

Top Markets by Game Downloads
App Store & Google Play

Rank	Country	Downloads
1	India	7.5B
2	Brazil	3.5B
3	United States	3.3B
4	Indonesia	2.6B
5	Mexico	2.0B

Source: Appfigures Explorer

2024

Global Consumer Spending in Mobile Games

+3.8%

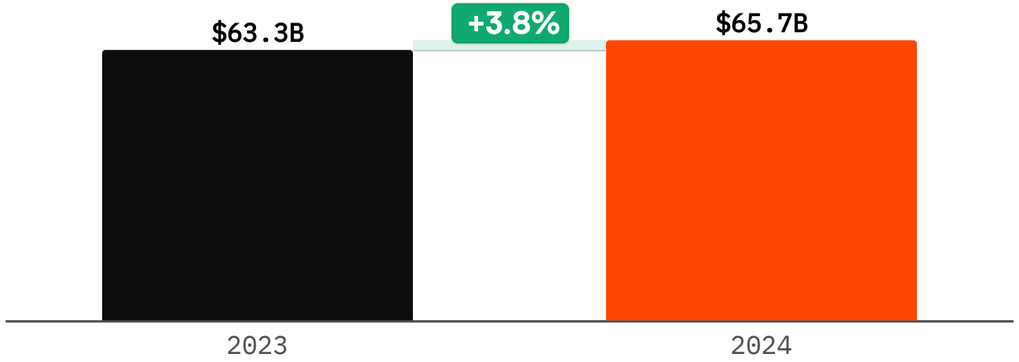
$65.7B

App Store & Google Play

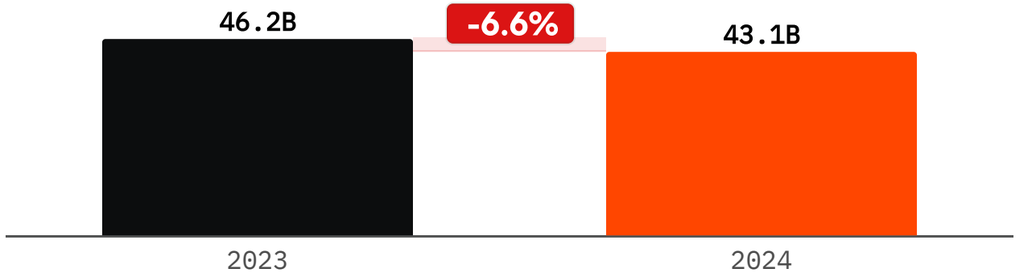
Source: Appfigures Intelligence

appfigures

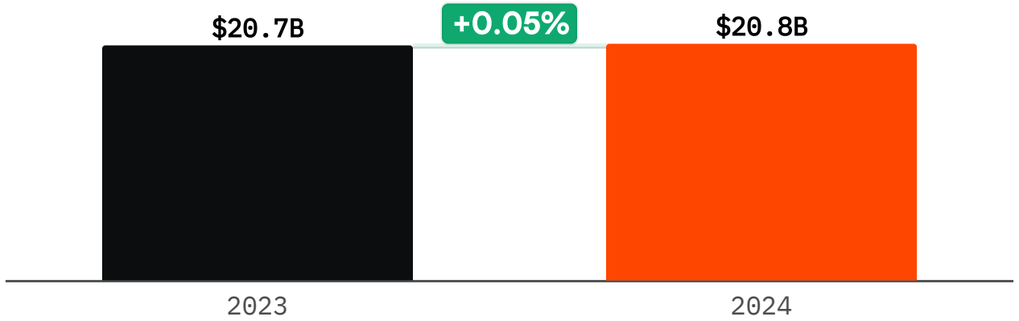
Global Consumer Spending in Mobile Games
App Store & Google Play



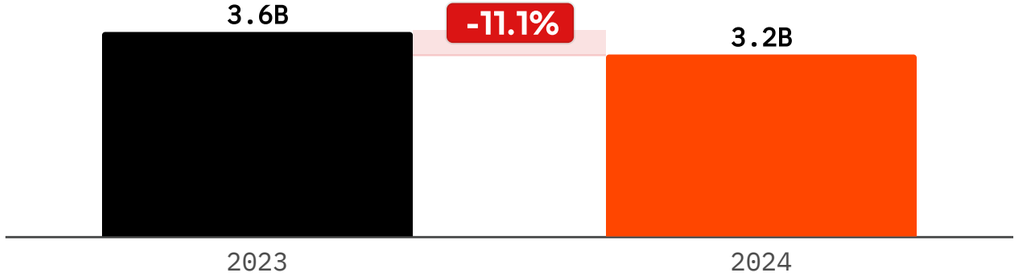
Global Downloads of Mobile Games
App Store & Google Play



U.S. Consumer Spending in Mobile Games
App Store & Google Play

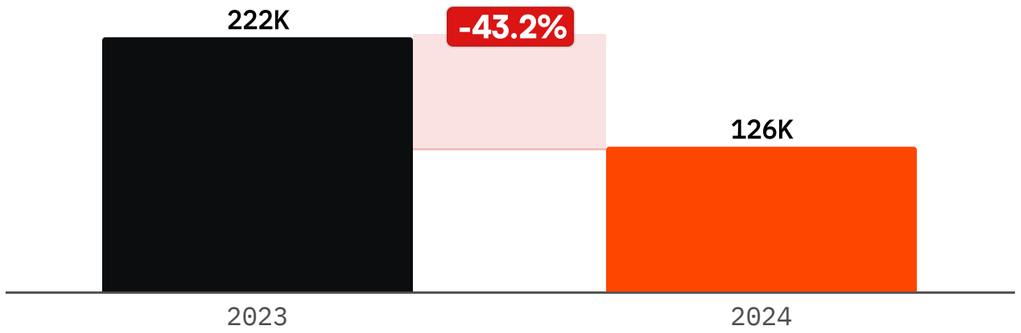


U.S. Downloads of Mobile Games
App Store & Google Play

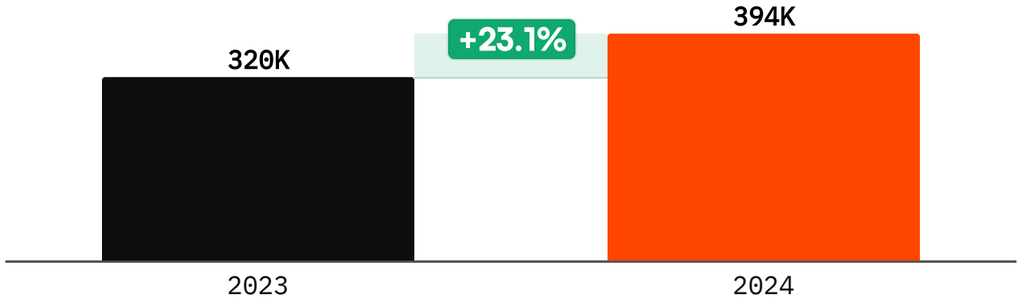


Source: Appfigures Intelligence

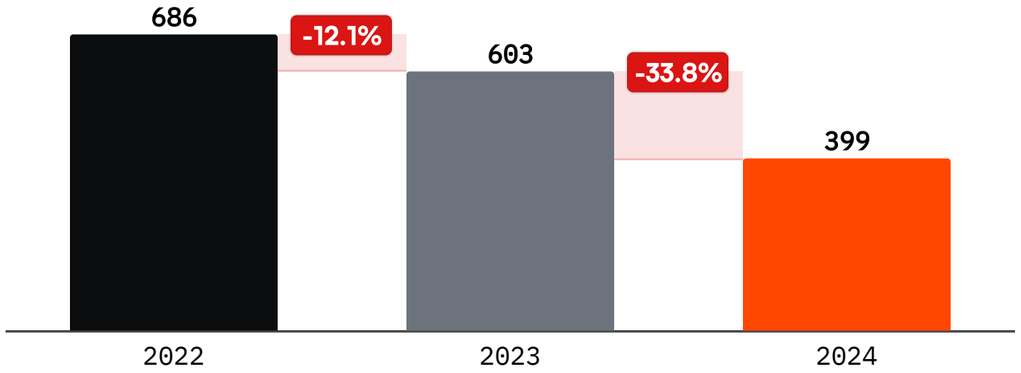
New Game Releases by Year
App Store & Google Play



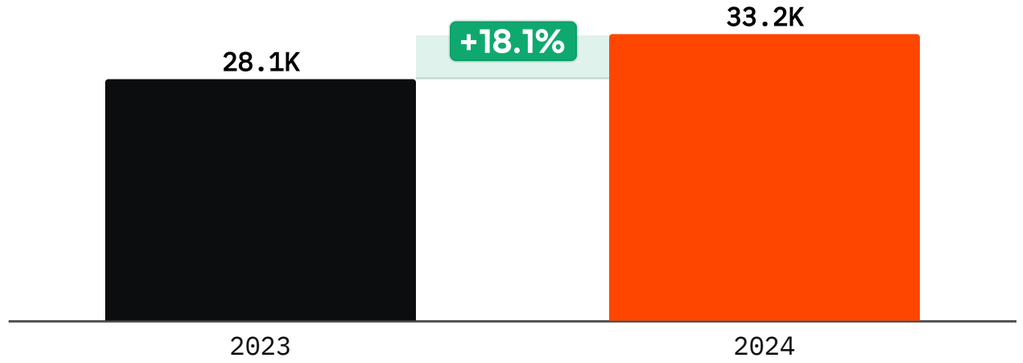
Mobile Games Available Worldwide
App Store & Google Play



Number of $1M+ New Releases by Year



Monetizing Mobile Games Worldwide
App Store & Google Play



Source: Appfigures Intelligence

2024

Global Consumer Spending Per Download in Mobile Games

+11.2%

$1.52

App Store & Google Play

Source: Appfigures Intelligence

appfigures

2024

U.S. Consumer Spending Per Download in Mobile Games

+11.1%

$6.43

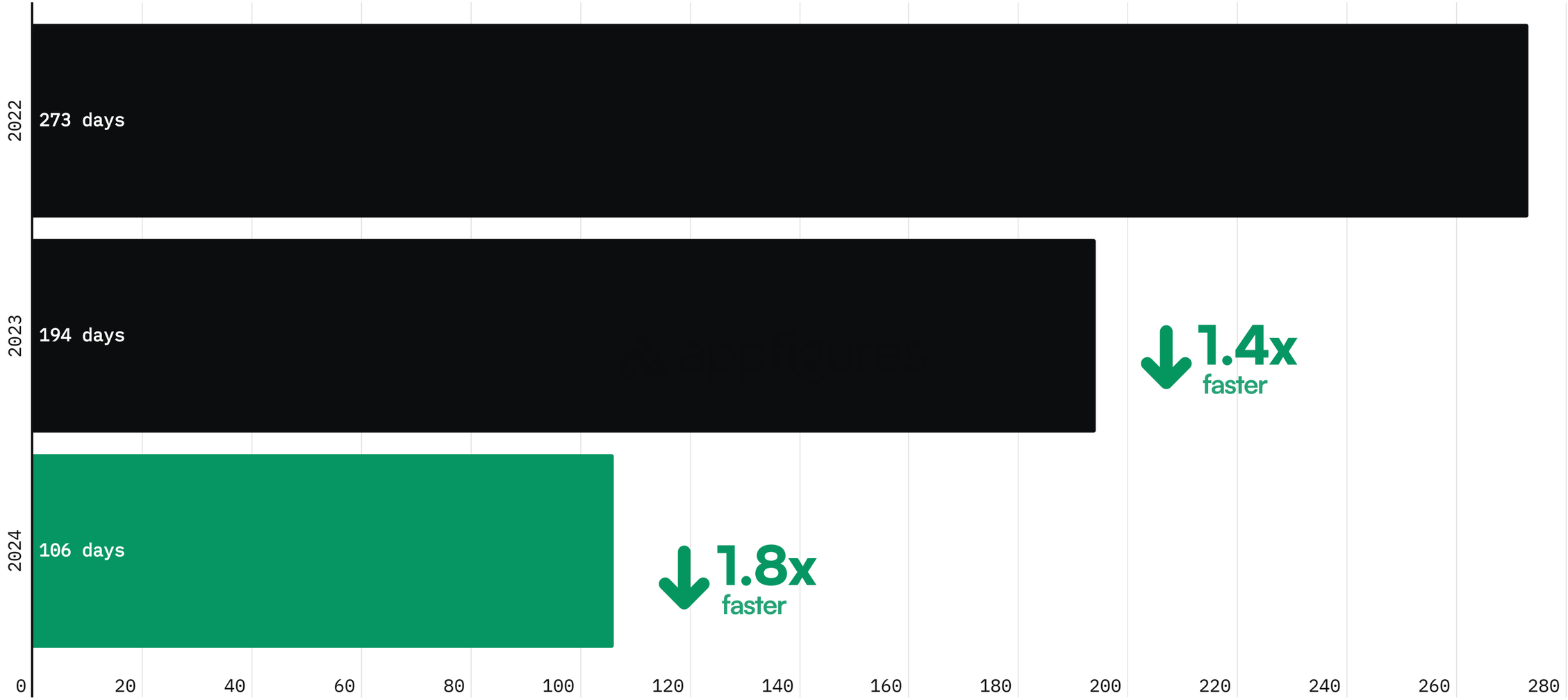
App Store & Google Play

Source: Appfigures Intelligence

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Average Days to First $1M by Year

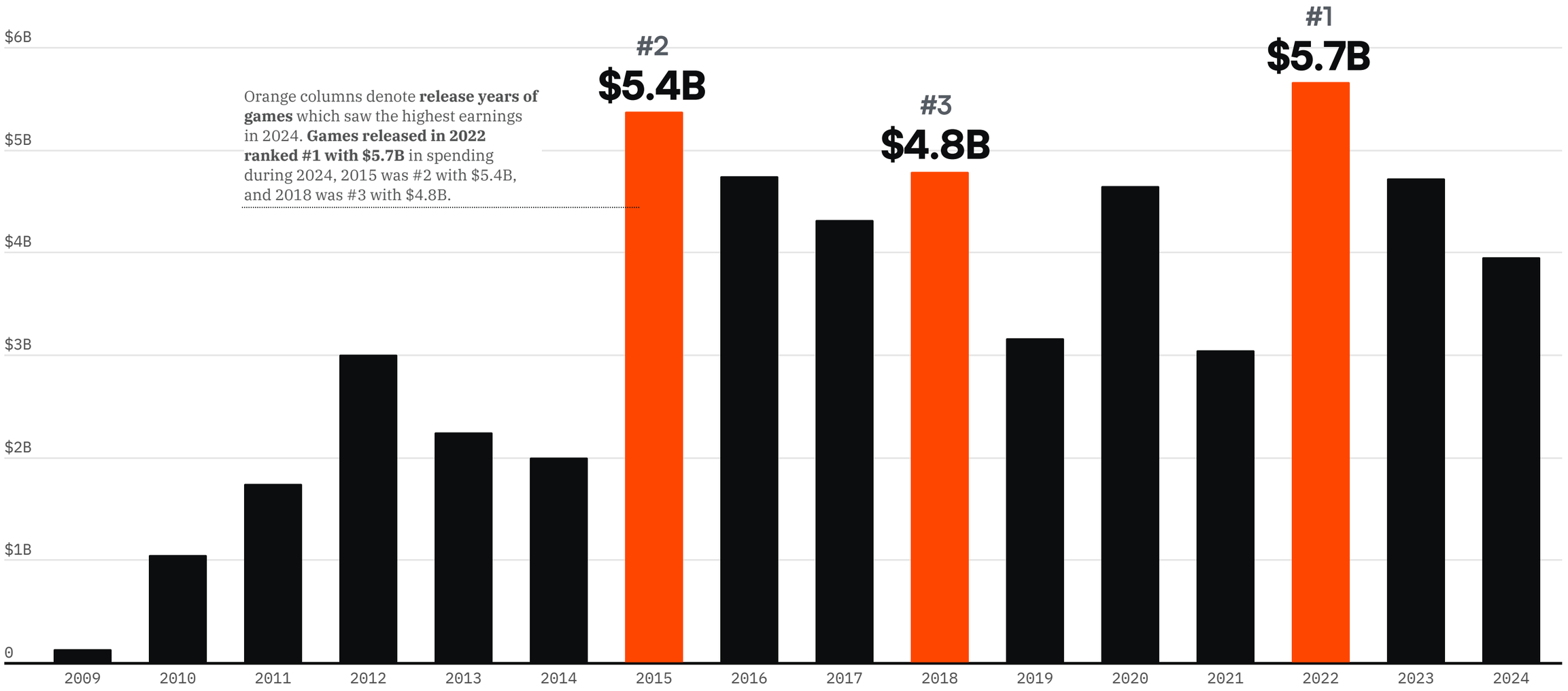
Worldwide • App Store & Google Play • 2022 - 2024



Source: Appfigures Intelligence

2024 Consumer Spending in Top 1K Earning Games by Release Year

Worldwide • App Store & Google Play • 2024



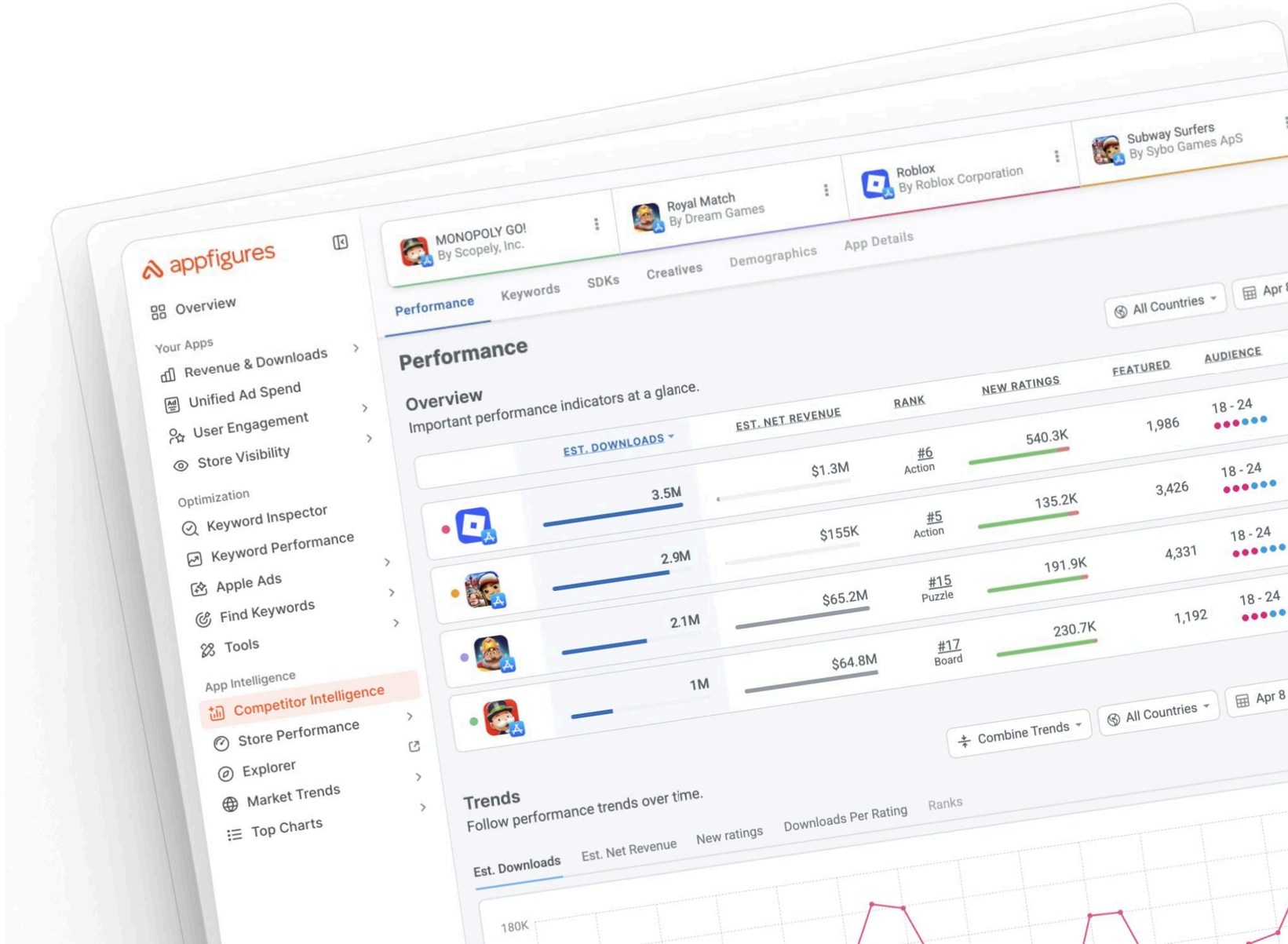
Source: Appfigures Intelligence

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02

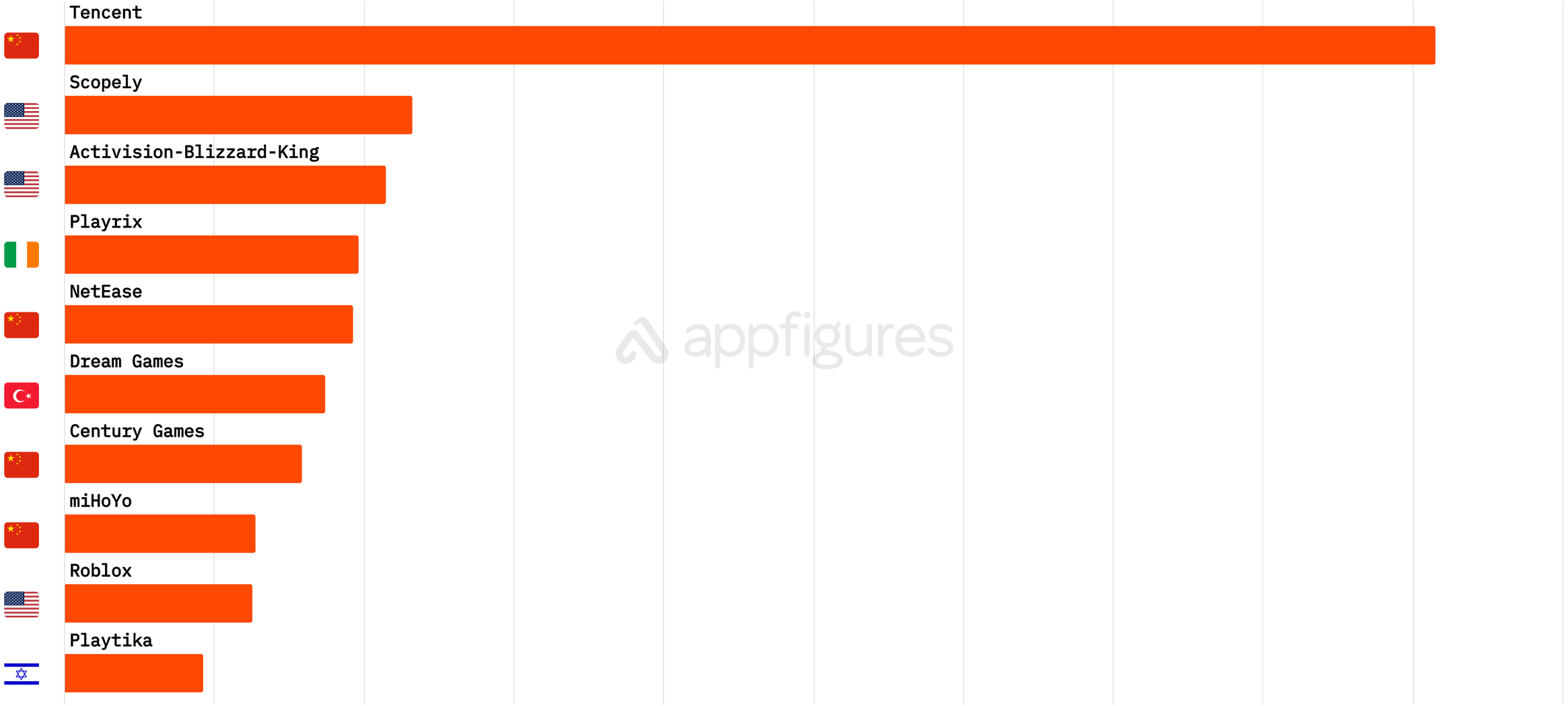
The Competitive Landscape

Who's at the top? Which types of games are dominating the charts? What do today's players want — and who's meeting their needs?

For answers, we look to the latest full-year, worldwide rankings for 2024. To set the stage, it's important to know which games — and the companies who've made them — are doing everything right.

Highest Earning Publishers

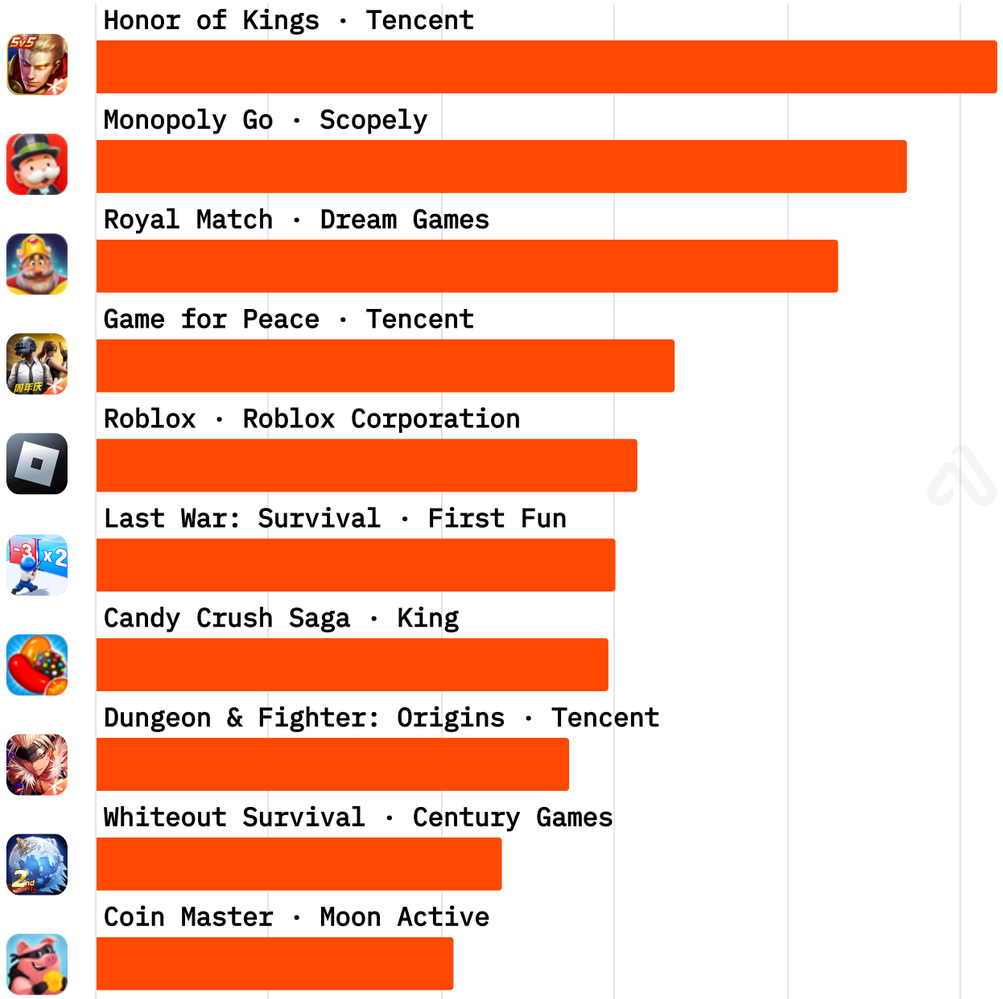
Worldwide • App Store & Google Play • 2024



Source: Appfigures Intelligence

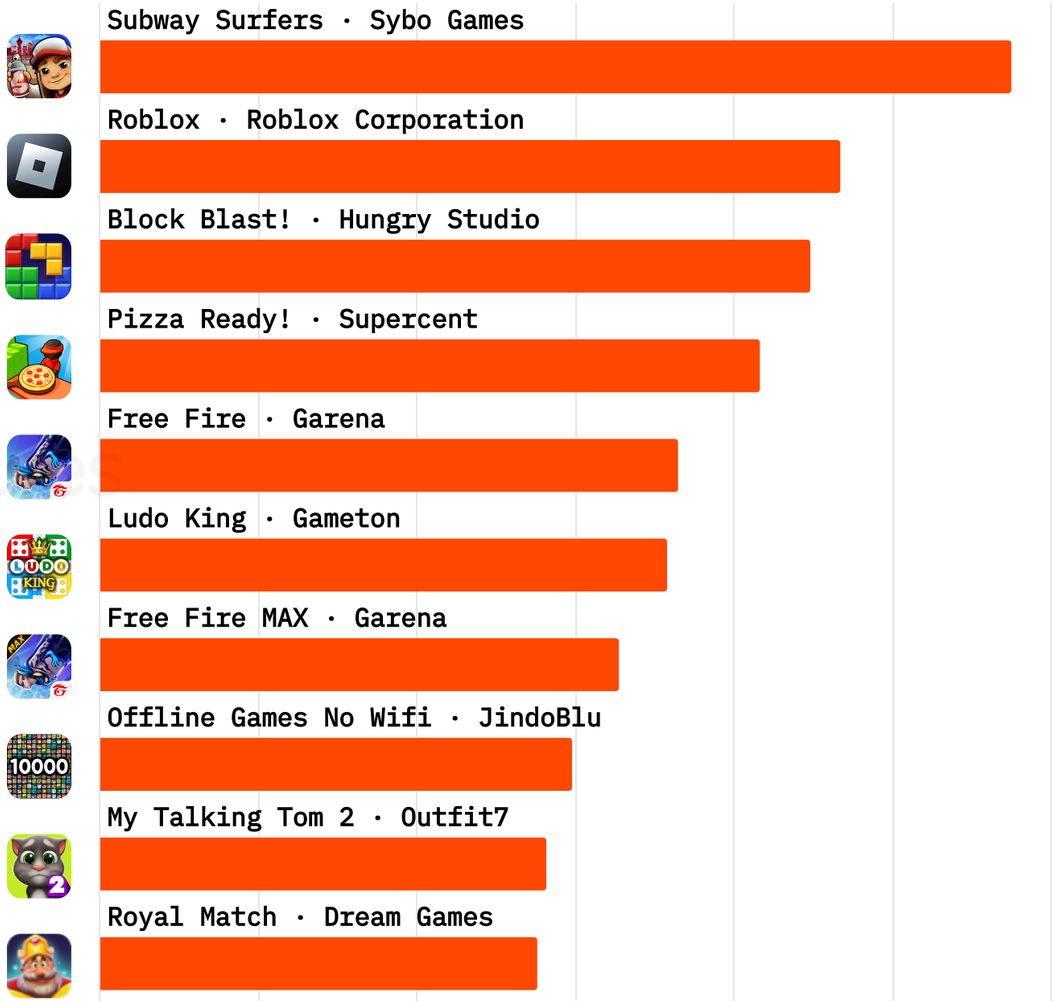
Highest Earning Games

Worldwide • App Store & Google Play • 2024



Most Downloaded Games

Worldwide • App Store & Google Play • 2024



Source: Appfigures Intelligence

03

What Today's Mobile Gamers Are Playing

As our market overview showed, mobile games released in 2022 brought in the greatest revenue among the top 1K titles last year — but what about more recent titles designed and marketed for consumers in 2024-2025?

We'll take a look at those next, along with an exploration of 2024's best performing categories, genres, and subgenres to pinpoint emerging opportunities in an evolving market driven by player preference.

Titles from China and Japan Dominate New Release Revenue

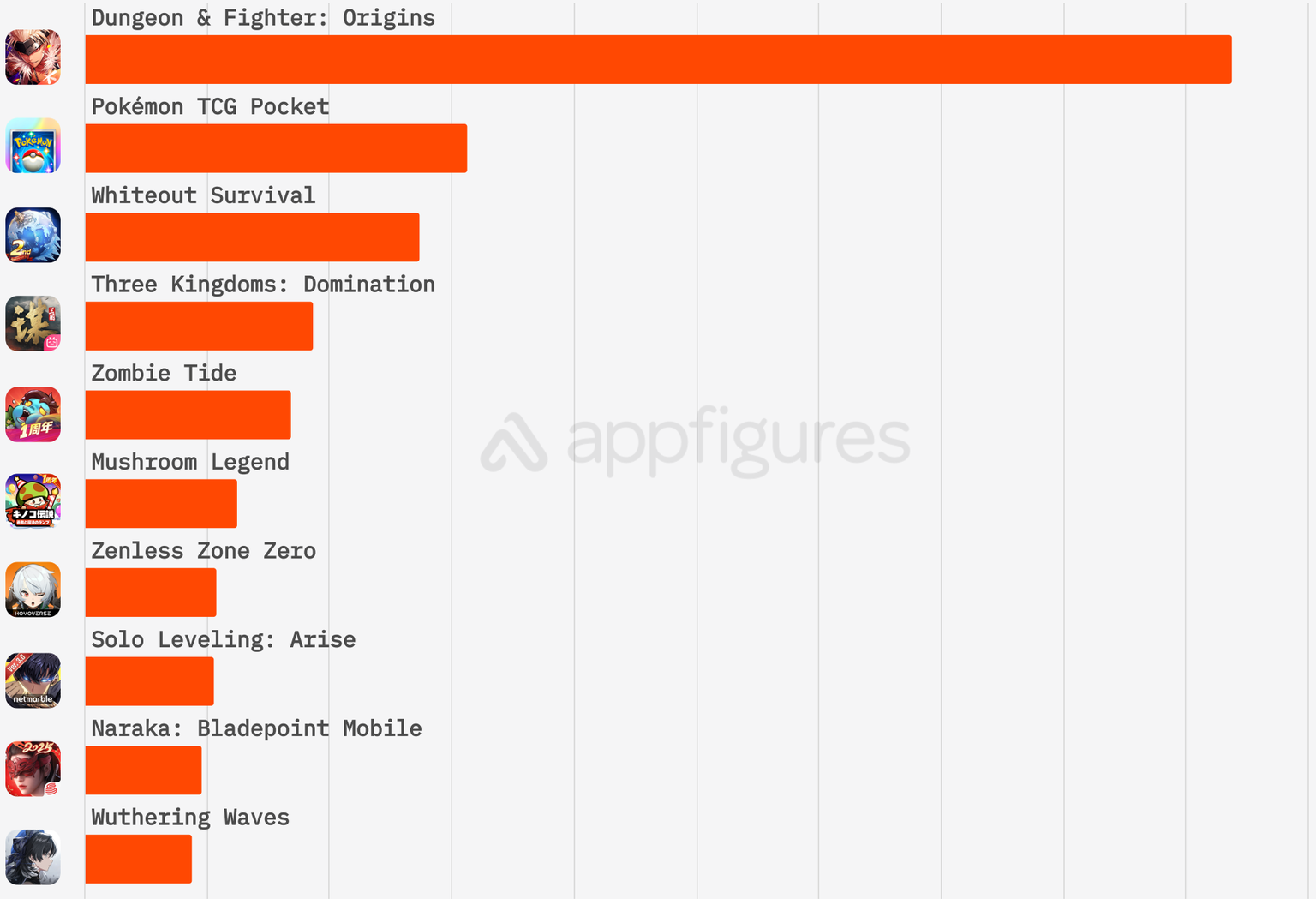
When it comes to which of the top 10 newest titles mobile gamers are devoting the vast majority of their spending to, **games from China (with eight) and Japan (with two) are far ahead of the pack** — and not just in their home markets.

At close to $1B in spending, Tencent's Dungeon & Fighter: Origins does generate most of its revenue in APAC, it, along with **the majority of 2024's breakout hits have found devoted player bases in the West.**

Pokémon TCG Pocket is emblematic of this trend. It derives most of its income from the United States, ahead of Japan, which is closely followed by EU markets.

Top Performing Mobile Games Released in 2024 by Consumer Spending

Worldwide • App Store & Google Play • Jan '24 - Dec '24



Source: Appfigures Intelligence

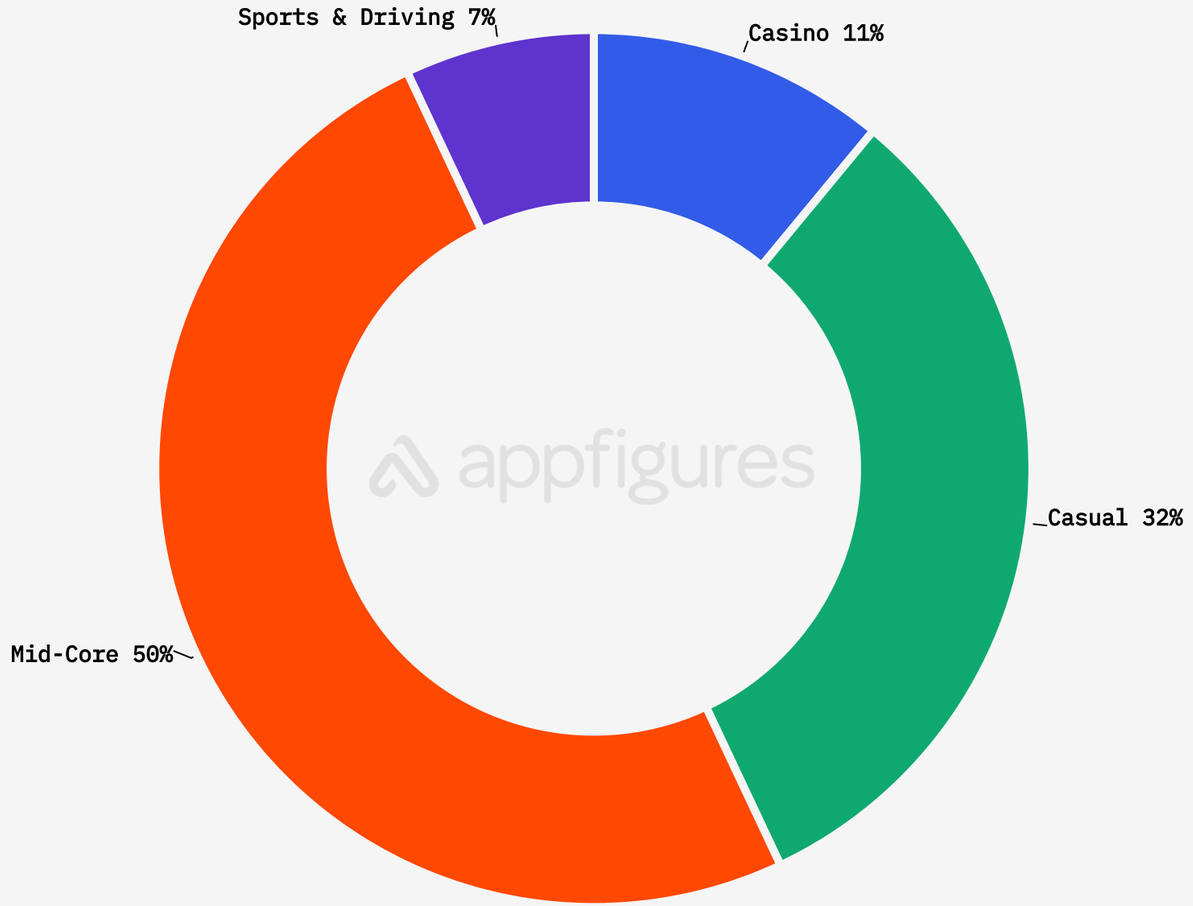
Mid-Core Games Account for Half of Top Earning Titles

Understanding the mobile games ecosystem starts with knowing that **app store categories don't tell the full story**. While important for placement, **the industry uses its own system of categories, genres, and subgenres** to track performance and spot trends.

For this report, **we've classified the top 1,000 earning mobile games of 2024** using a taxonomy widely recognized by developers. **The data shows Mid-Core titles — like Strategy and Shooters — make up half the list.** Casual games, including Puzzle and Lifestyle, account for nearly a third. The rest is split between Casino games at 11% and Sports & Driving titles at 7%.

Percentage of Top 1K Earning Mobile Games in 2024 by Category

Worldwide • App Store & Google Play • Jan '24 - Dec '24

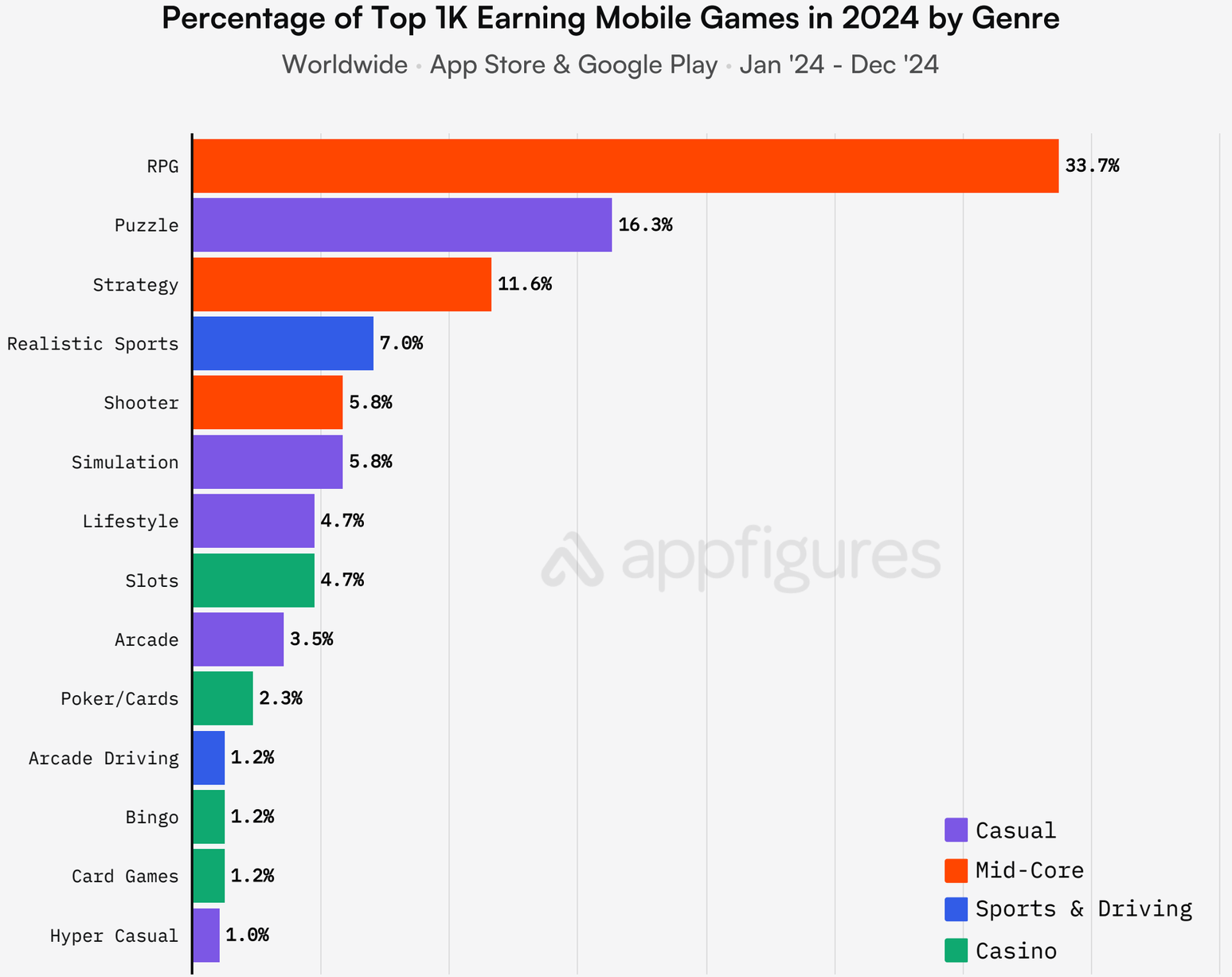


Source: Appfigures Intelligence

Genre Analysis Reveals the Real Revenue Engines

Looking one layer deeper into genre performance, it's clear why the Mid-Core category leads: **RPGs alone account for nearly 34% — or 340 — of the top 1,000 revenue-generating mobile games.** Strategy, another Mid-Core genre, ranks third overall with just over 100 titles in the top 1K. Shooter games, which round out the Mid-Core trio, land in fifth place by volume.

Sitting between RPG and Strategy are Puzzle games, a Casual genre and major pillar of mobile gaming from the outset. Puzzle games make up 16.3% of the top 1,000, about half of RPGs' share, yet they far surpass the popularity of other Casual genres. **The data shows that just a few genres drive the bulk of mobile game revenue today.**

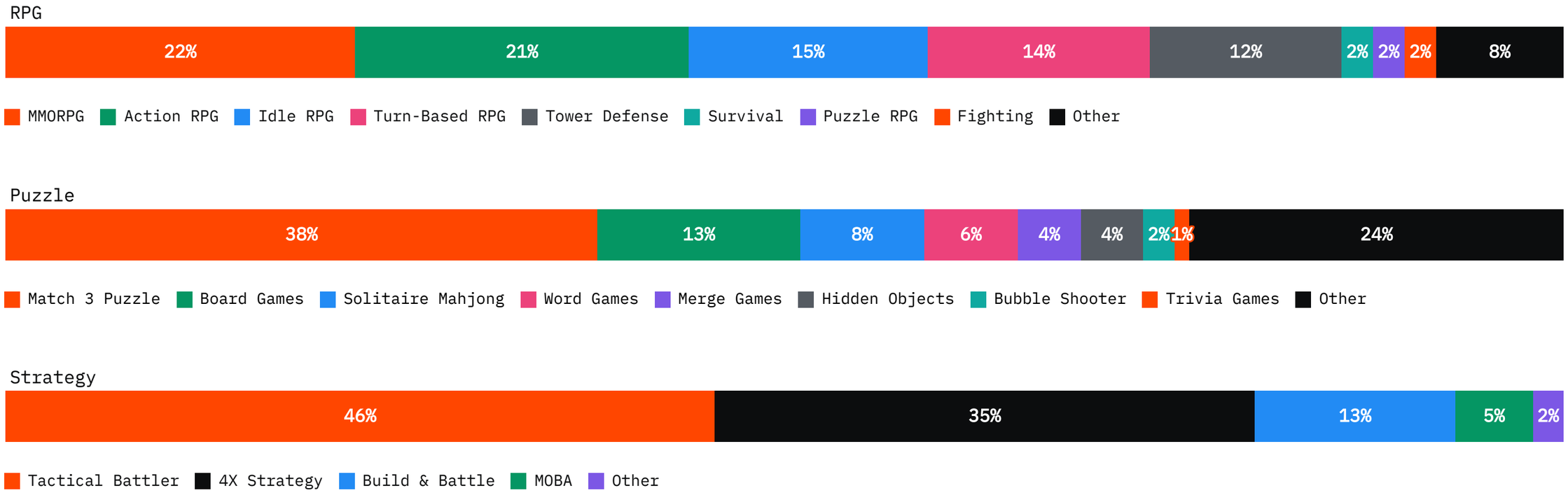


Source: Appfigures Intelligence

Subgenre Breakdown for Largest Genres by Number of Games in Top 1K

Worldwide · App Store & Google Play · Jan '24 - Dec '24

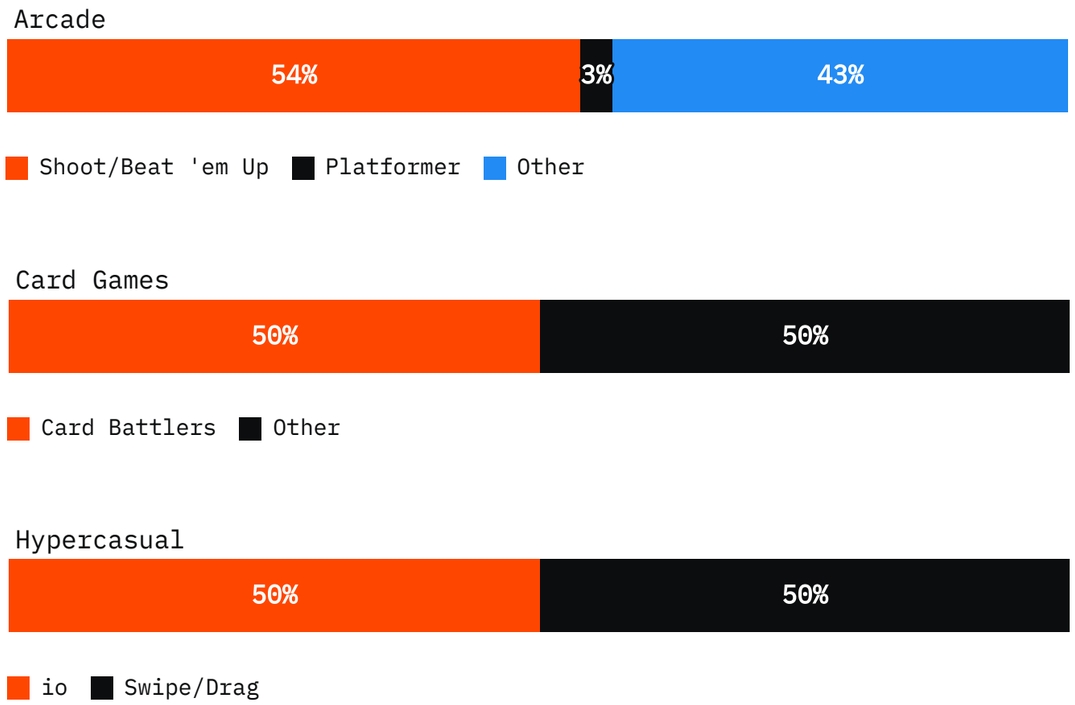
Each major genre — like the three largest shown here — breaks down into several subgenres. Within RPGs, for instance, we see more than eight subgenres represented in the top 1,000. Two lead the pack: MMORPGs (Massively Multiplayer Online RPGs) and Action RPGs, which account for 22% and 21% of the full list, respectively. This level of detail helps reveal what's really driving genre-level performance.

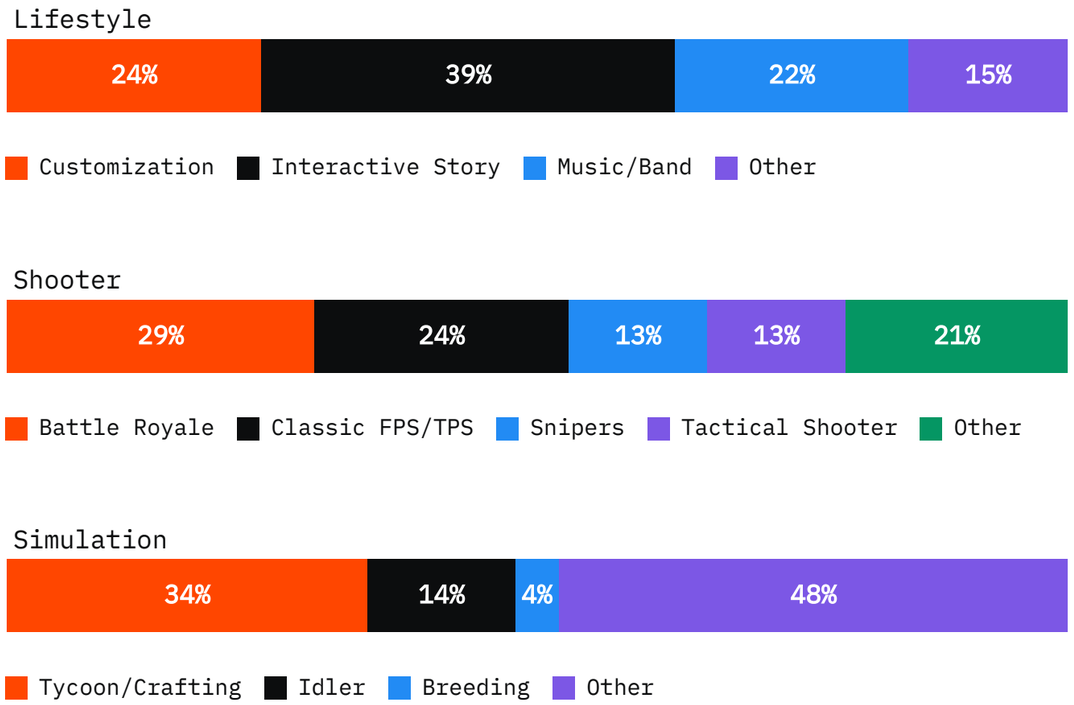


Subgenre Breakdown for Other Genres with Games in Top 1K

Worldwide · App Store & Google Play · Jan '24 - Dec '24

Outside the largest genres, few specific subgenres dominate. Most have only a handful of standouts. For instance, non-Casino Card Games are split between Card Battlers like Hearthstone and titles that don't fit neatly into a formal subgenre. **Battle Royale games — like PUBG Mobile — still lead the charge among top performers in the broader Shooter genre.**





04

Where Mobile Gaming Is Growing—And Slowing

Just as it's crucial to follow shifts in player taste, major releases, and how those impact popularity of the various categories, genres, and subgenres from year to year, it's key to keep tabs on where the data's showing emerging geographic and market-level opportunities are presenting themselves.

Markets with Greatest Year-Over-Year Consumer Spending Growth

2023 - 2024

Top 10

	Market	'24 Revenue	Growth YoY
	Brazil	$574M	+47.3%
	Mexico	$345M	+47.1%
	Poland	$330M	+42.4%
	Turkey	$418M	+36.3%
	Romania	$130M	+29.2%
	India	$175M	+28.4%
	United Arab Emirates	$192M	+23.8%
	Saudi Arabia	$318M	+18.3%
	Germany	$2.4B	+16.4%
	Netherlands	$400M	+15.8%



Countries with $100M+ 2024 spending, by % growth

Markets with Greatest Year-Over-Year Consumer Spending Decline

2023 - 2024

Top 10

	Market	'24 Revenue	Decline YoY
	Singapore	$291M	-19.0%
	Malaysia	$286M	-17.5%
	Hong Kong	$779M	-15.7%
	Chile	$111M	-11.5%
	New Zealand	$128M	-7.0%
	Vietnam	$258M	-6.4%
	Japan	$8.1B	-6.1%
	South Africa	$92M	-2.3%
	Australia	$1.0B	-1.7%
	Taiwan	$2.2B	-0.4%



Countries with $50M+ 2024 spending, by % decline

Markets with Highest Per Capita Consumer Spending in Mobile Games

2024



Top 10

	Market	$ Per Capita	Growth YoY
	Hong Kong	$104	-15.7%
	Taiwan	$94	-0.4%
	South Korea	$68	+1.3%
	Japan	$66	-6.1%
	United States	$60	+0.1%
	Singapore	$53	-19.0%
	Switzerland	$46	+6.5%
	Australia	$38	-1.7%
	Iceland	$34	+3.9%
	Canada	$33	+4.0%

05

Meeting Mobile Gamers Where They're At

There's determining what type of game to develop. There's identifying where to market it. Then there's how and to whom to market.

In this section, we look at tactics to get in front of desired audiences, drive adoption, and maximize budget in the process. User acquisition is getting harder, but that doesn't mean it isn't also becoming smarter.

Top Apps with Ads by Crossover Audience with High-Earning Games from 2024

Worldwide • App Store & Google Play • Jan '24 - Dec '24

Knowing which apps' user bases have the **highest crossover usage** with a game can offer crucial insight when deciding **where to allocate advertising resources.** For example, here's a look at 10 of the world's top games and their **complementary apps.**

	Game	#1	#2	#3	#4	#5	#6	#7	#8	#9	#10	#11	#12	#13	#14	#15
	Brawl Stars															
	Candy Crush Saga															
	Clash of Clans															
	Coin Master															
	Gardenscapes															
	League of Legends															
	Monopoly GO!															
	Pokémon GO!															
	Roblox Mobile															
	Royal Match															

See appendix for full application names.

Source: Appfigures Intelligence

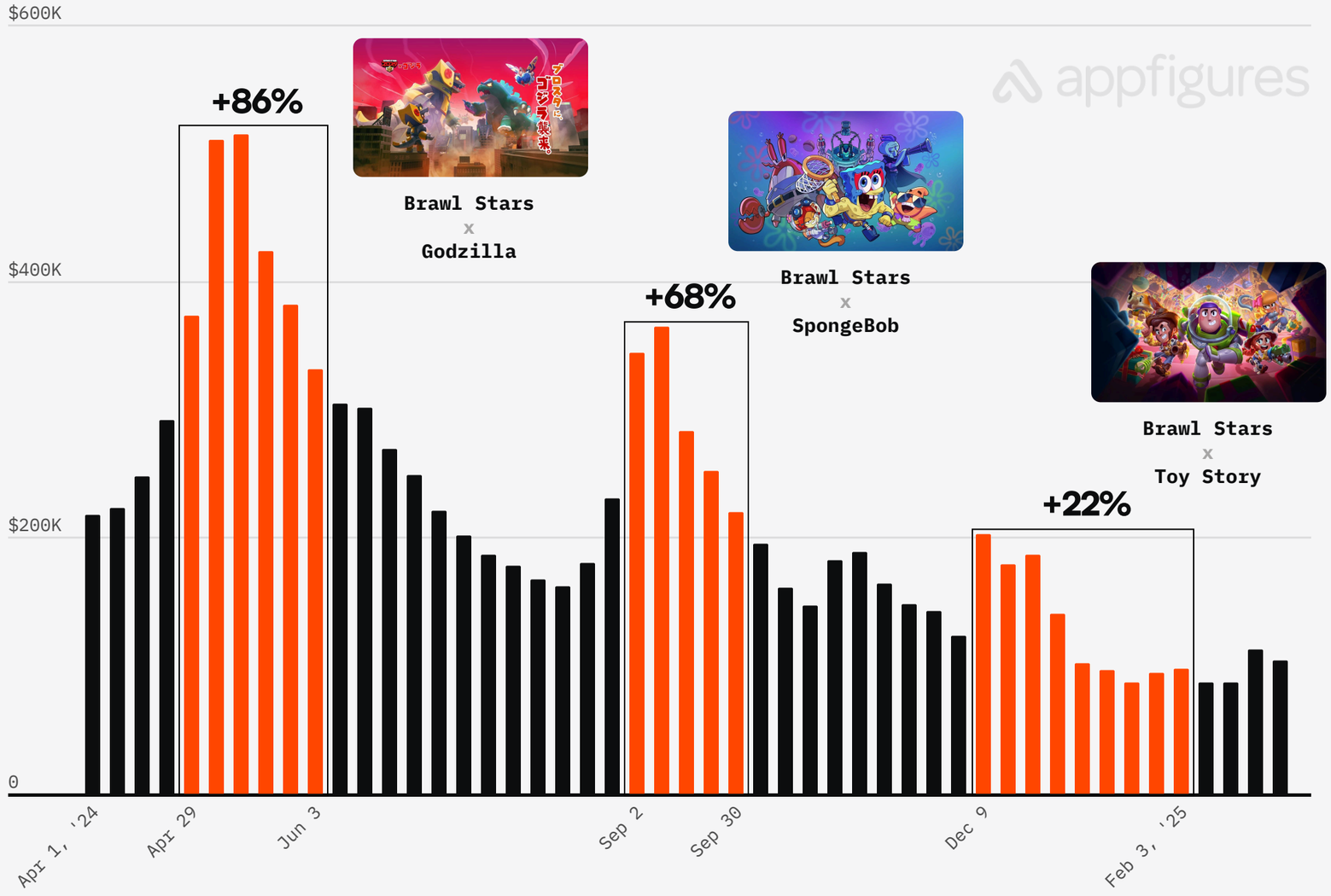
Case Study: Supercell's Brawl Stars IP Team-Ups

Collaborations between mobile games and major IP from TV and movies to comics and fashion are nothing new. But in online multiplayer and live service games they shine, **boosting both player acquisition and spending.** Monetization through branded events has grown more sophisticated over time and is **now a core strategy in top titles.**

For example, **in early 2024 alone, Brawl Stars featured three IP crossovers** — Godzilla, SpongeBob SquarePants, and Toy Story — **each driving notable revenue spikes.** Godzilla led with an 86% lift over the previous four weeks, SpongeBob delivered 68%, and Toy Story added 22%, underscoring the value of well-matched partnerships.

Impact of IP Crossover Events on Brawl Stars Player Spending

Worldwide • App Store & Google Play • April '24 to Feb '25



Source: Appfigures Intelligence

06

Learning from How Top Games Monetize

In our final section, we use data to answer questions around which types of in-game monetization are most popular in the current mobile games market, and how a mainstay of money making in apps, namely in-app advertising, has seen changes in the mix of networks and their corresponding SDKs used over time.

How the Top Mobile Games Make Their Money

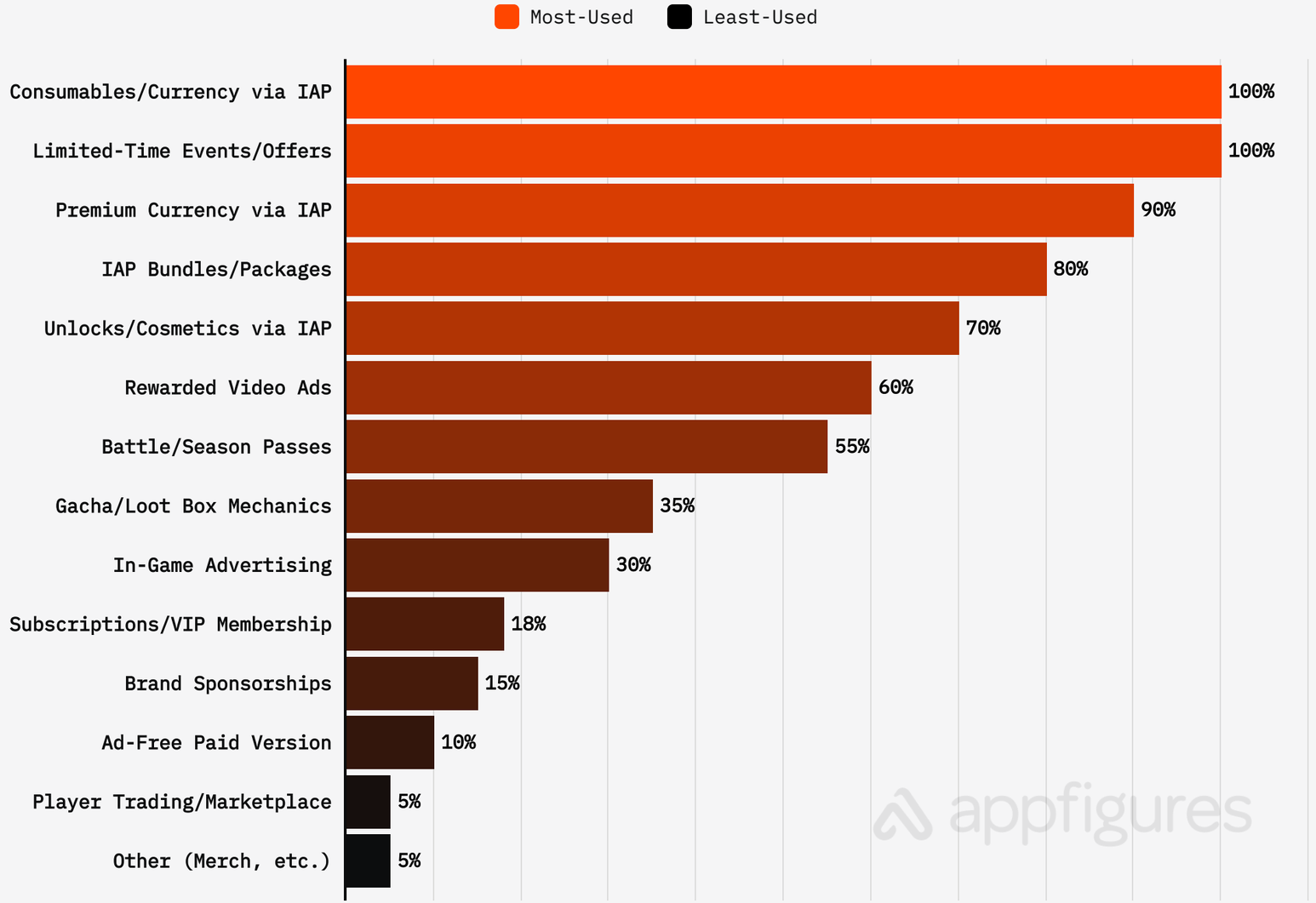
The mechanisms mobile games rely on to optimize their monetization have **grown in variety and sophistication over time,** while some have become "must-have" mainstays. We looked at how the **top 500 earning mobile games worldwide in 2024** monetized and the results reveal some clear standouts.

Two types, **Consumables/Currency and Limited Time Events/Offers, were present in all of them.** Others, including Premium Currency, IAP bundles, and Unlocks/Cosmetics were present in **at least 70%** of the top 500 titles.

These findings can be helpful when working to identify **which monetization types are necessary and which to experiment with.**

Monetization Type by Presence in Top 500 Earning Mobile Games for 2024

Worldwide • App Store & Google Play • Jan '24 - Dec '24



Source: Appfigures Intelligence

All Ad Networks Claim They're the Biggest—These Really Are

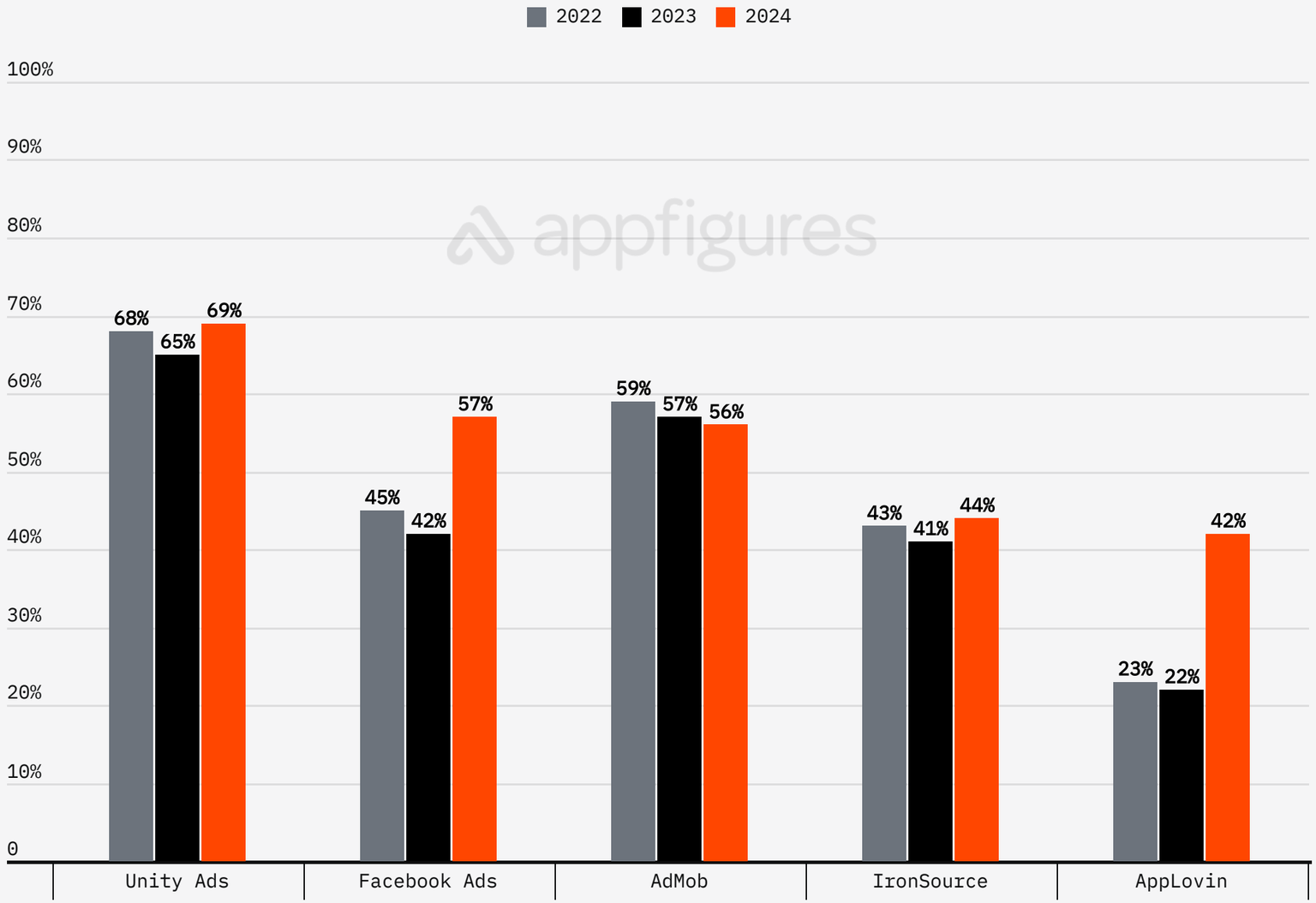
Another core option for monetization in free-to-play games is in-game advertising, but knowing which ad networks the top titles are tapping into — and how they've changed over time — can be key to realizing the best results.

2024 Ad Network Top 10

Ad Network	Adoption %	From 2023
Unity Ads	69%	↑
Facebook Ads	57%	↑
AdMob	56%	↓
IronSource	44%	↑
AppLovin	42%	↑
Vungle	25%	↓
Supersonic	18%	↑
Fyber	13%	↑
Pangle	10%	↑
Mintegral	9%	↑

Install Penetration of Top In-App Advertising Network SDKs by Year

Worldwide · App Store & Google Play · Jan '22 - Dec '24



Source: Appfigures Intelligence

07

Before You Go: Must-Know Metrics

We've pulled together a wide array of findings to present a snapshots of the modern mobile games market and relevant best practices in this report. Here are the most important and useful, all in one place.

Mid-Core Titles Lead the Pack

RPGs, Strategy, and Shooter titles continue to dominate the revenue charts, with RPGs making up **34% of the top 1,000 games** by revenue.

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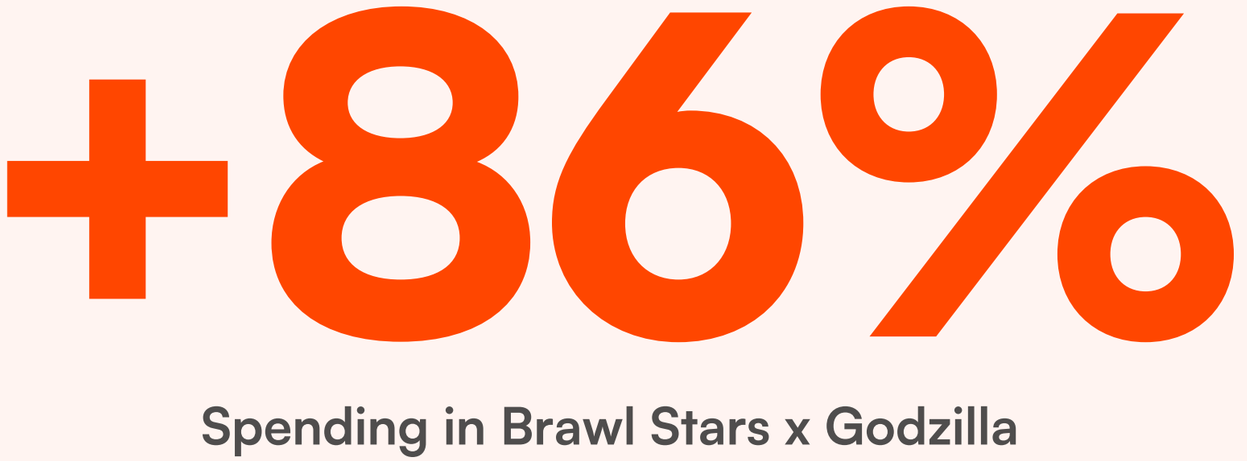
50%

of Top-Grossing Games

Source: Appfigures Intelligence

Branded Events Mean Business

IP crossovers drove massive revenue spikes.
In Brawl Stars, events with Godzilla, SpongeBob, and Toy Story lifted revenue 86%, 68%, and 22%, respectively.



Spending in Brawl Stars x Godzilla

Source: Appfigures Intelligence

Puzzle Games Stay Competitive

Puzzle is the only Casual genre to rival Mid-Core in revenue share. Match-3 games led the way among Puzzle subgenres.

appfigures

16.3%

of Top Games are Puzzle Titles

Source: Appfigures Intelligence

Unity Is the Top Ad Network

Unity Ads led all ad networks in 2024 adoption, followed by Facebook (57%) and AdMob (56%).
Most top games used more than one.



of Top 1K Games Use Unity Ads

Source: Appfigures Intelligence

YouTube, TikTok, Discord Lead Crossover

Gamers using hit mobile titles also **heavily overlap with certain apps,** offering strong signals for marketing strategy and UA targeting.

appfigures

TOP 3

Apps Used by Gamers

Source: Appfigures Intelligence

Emerging Markets Drive Growth

Brazil, Mexico, and Vietnam posted the **strongest spending gains** in 2024, signaling big potential beyond the U.S., China, and Japan.



Year-Over-Year Spending Growth in Brazil

Source: Appfigures Intelligence

Matchmaking Monetization Models

Every top 500 game uses consumables and limited time offers to drive IAP. Bundles, cosmetics, premium currency, and battle passes round out the top monetization mechanisms.



08

Methodology

Methodology & Technology: How We Built This Report

Custom Category & Genre Classifications

Analysis in this report is based on a custom classification of the top 1,000 earning mobile games, worldwide, in 2024. Each app was assigned a games industry-aligned category, genre, and subgenre, independent from and more granular than categories used on the App Store or Google Play.

SDK Identification

Appfigures downloads and scans every free iOS app from the App Store and Android app from Google Play when they're released or updated. We then use a human-assisted identification process to get a list of all installed SDKs.

Countries Included

Appfigures estimates cover 100 countries selected by scale, across Africa, Asia, Europe, North America, South America, and Oceania. They include a diverse representation of key markets, including India, Brazil, Australia, and Canada, alongside the likes of China, the United Kingdom, and the United States.

App Store Fees and Commerce Payments

All revenue estimates in this report are presented as gross consumer spending in apps before Apple and Google's platform fees (typically 30%). Only revenue from in-app purchases (IAP) that is processed through the app stores is included; Web purchases, in-app advertising, and other sources are not.

Estimated Downloads and Revenue

Appfigures utilizes cutting-edge proprietary Machine Learning and Deep Learning AI models trained using billions of data points to produce highly accurate estimates of first-time downloads and revenue from mobile apps on a per country and day level. Our estimates have been validated by thousands of data owners.

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09

Appendix

Apps Used by Gamers

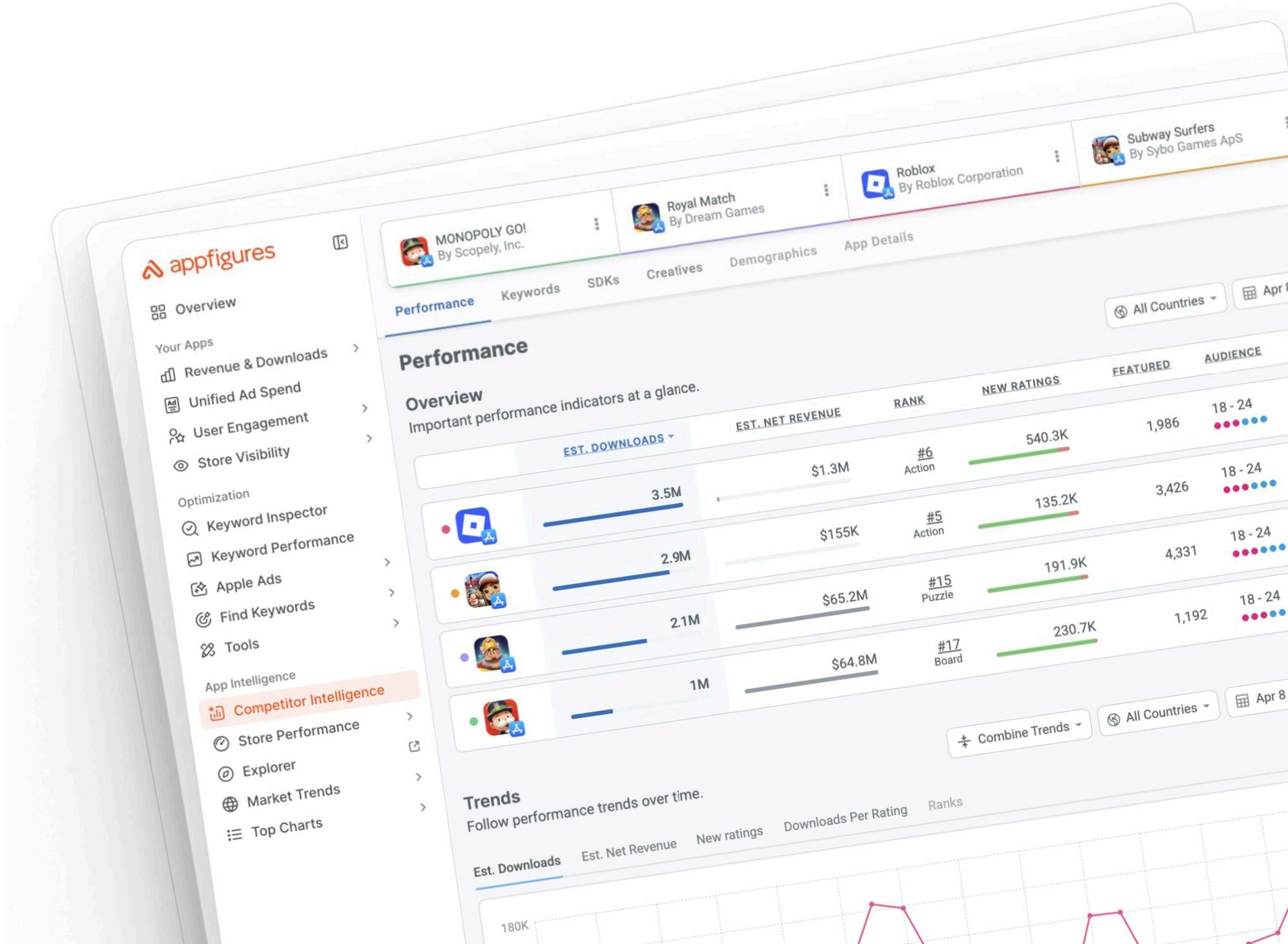
Amazon Prime Video	MyFitnessPal	Uber
Avast	MX Player	Viber
CapCut	Pandora	VK
Cash'em All	Paytm	WILDBERRIES
Discord	Picsart	X
Duolingo	Pinterest	XRecorder
Facebook	PLAYit	YouCut
Fetch	Reddit	YouTube
Flipkart	SHAREit	YouTube Music
Groovepad	Snapchat	Zedge
Home Workout	Spotify	Zepeto
InShot	TikTok	Zomato
Likee	Tinder	
Lose Weight	Truecaller	
Make Money	Tumblr	

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