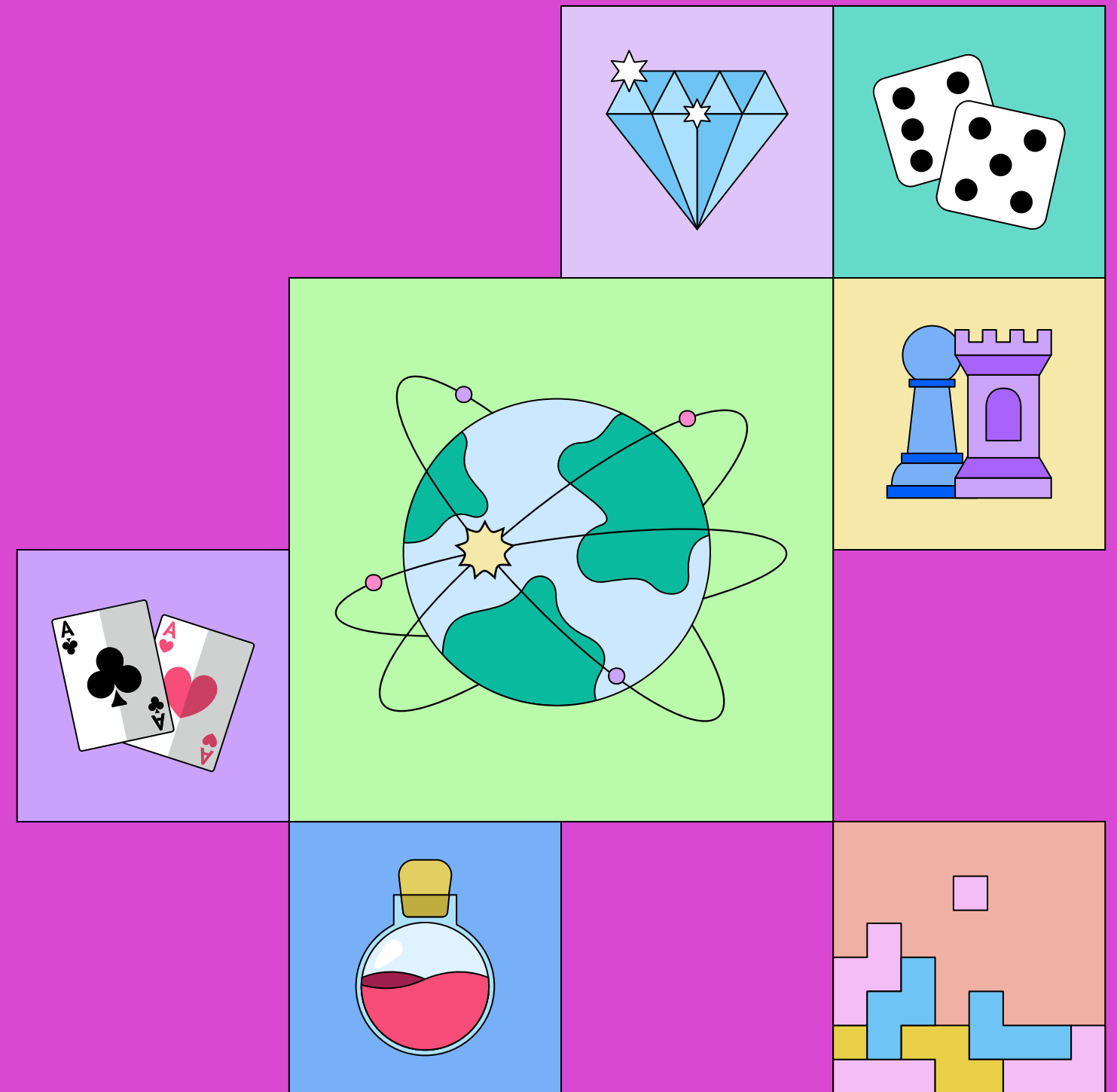


 REPORT

# The gaming app insights report: 2026 edition

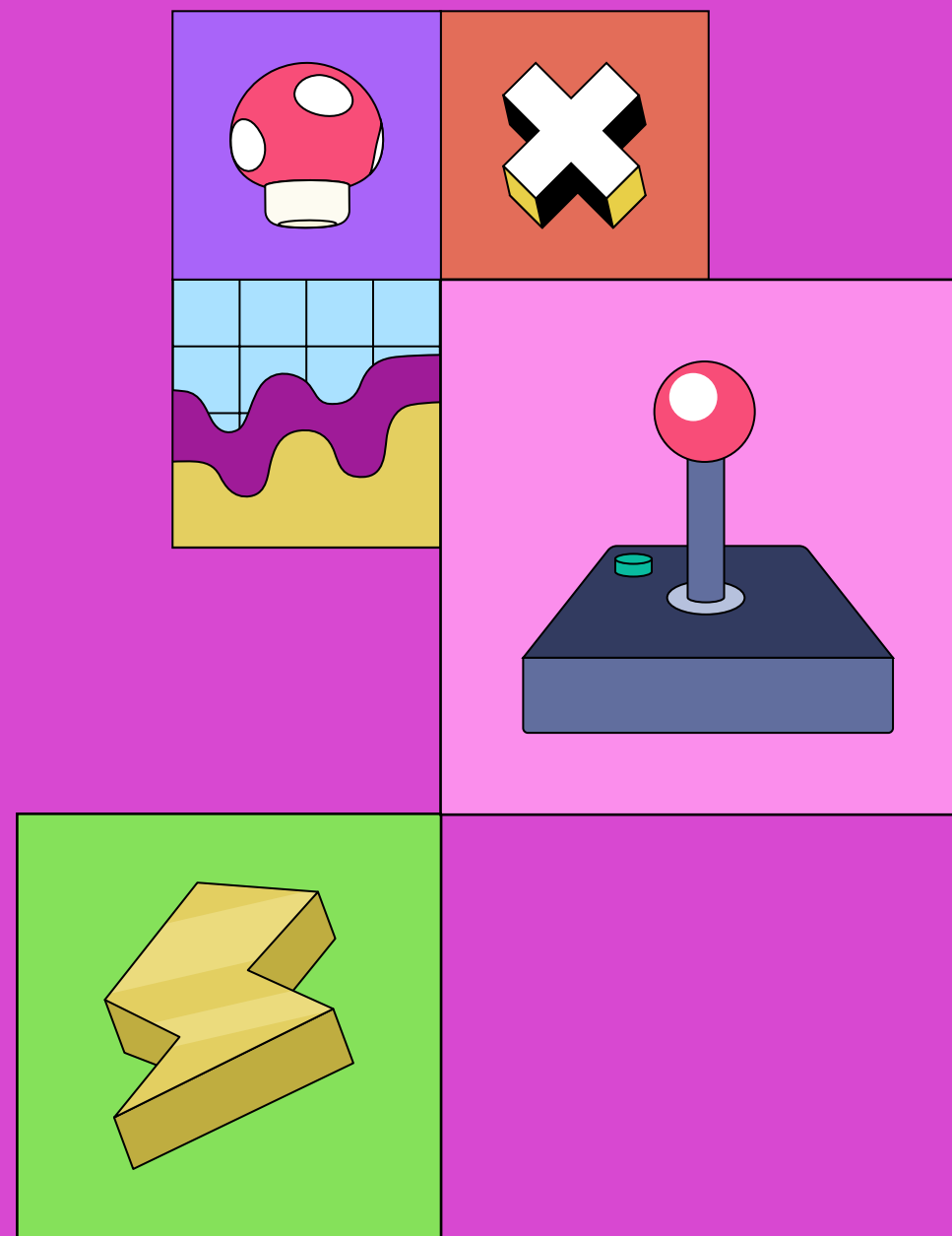
Unlocking growth opportunities  
for mobile marketers

 ADJUST



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## INTRODUCTION

# Retention is becoming the priority play in mobile gaming

Mobile gaming remains one of the highest performing app verticals, and a major force in the gaming industry at large. In 2025, mobile accounted for [55% of the gaming industry's total revenue](#), and with almost 3 billion mobile gamers worldwide (about 80% of all gamers), the growth opportunity remains significant. With new challenges around install volume and cost, marketers, advertisers, and studios are evolving in response to user habit changes and market realities.

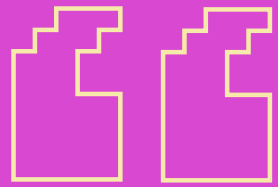
An industry that once largely relied on a high turnover of downloads and fast-paced ad revenue is now including an increasing number of retention elements and monetization streams into games, to focus on higher LTV players. Among casual, mid-core, and hyper casual games combined, IAP revenue grew to [\\$81.8 billion](#), in 2025 marking the third consecutive year of growth across the App Store and Google Play. Players also spent a total of 444.6 billion hours in mobile games (a 1% YoY increase). Once gamers are acquired, they're sticky and they're spending, but finding and converting them successfully now requires precision; from selecting the right partners to finding the best formats, and consistently producing high-quality creatives.

AI adoption has accelerated and is making a real impact in the production of creatives, testing, live operations, messaging, and personalization. A 2025 Google Cloud survey, for example, reported that [over 90% of game developers now rely on AI](#) to automate and simplify tasks like playtesting, localization, and balancing.

Growth is happening and there's an abundance of data. Understanding which signals to focus on and which actions to take requires a source of truth that can be relied on for fast decisions. Teams need accurate, reliable, and ready-to-use intelligence that links acquisition, engagement, and monetization.

Drawing on data from thousands of apps, the **Gaming app insights report: 2026 edition** breaks down top-of-funnel, engagement, and user acquisition cost metrics by subgenre, region, and country. We provide you with the necessary context and market trends from the past year to help you benchmark your performance, set goals, adjust your strategies, and stay ahead of the competition in 2026. We also zoom in on the regions, countries, and gaming genres/subverticals with the most growth.





“As mobile gaming matures, growth is becoming less about scale alone and more about precision. Amid rising acquisition costs, studios are increasingly focused on retaining high-value players, optimizing creatives and channels, and building ad-to-experience flows that favor sustained play over fast turnover. Reliable measurement is the key to making this possible. Understanding where true long-term value comes from, and the ability to connect acquisition, engagement, and monetization data for fast decisions is now a necessity.”

**ADJUST**




Tiahn Wetzler  
**Director Marketing**


## Industry trends: What we're keeping an eye on


- 1 D2C**  
 Mobile game publishers are increasingly investing in D2C channels and external web stores to own player relationships and capture higher-margin revenue through web shops and direct payments.
- 2 AI CREATIVES**  
 AI-generated ad creatives are enabling faster testing cycles, hyper-personalized variations, and lower production costs, significantly improving marketing efficiency and ROAS.
- 3 REWARDS**  
 Reward-driven mechanics, such as rewarded ads, loyalty programs, and in-game incentives, are becoming central to boosting engagement, retention, and monetization.

- 4 UA COST CHALLENGES**  
 Rising user acquisition costs and signal loss are pressuring marketers to optimize targeting, creative performance, and incrementality measurement, necessitating reliable attribution and measurement more than ever.
- 5 LIVE OPS**  
 Continuous live operations, including time-limited events, seasonal content, and dynamic offers, are critical for sustaining engagement and extending player lifetime value.
- 6 CROSS-PLATFORM**  
 Cross-platform strategies are expanding as studios align mobile, PC, and console ecosystems to maximize reach, retention, and franchise longevity.

**SPOTLIGHT ON: ADJUST SOLUTIONS**

- 

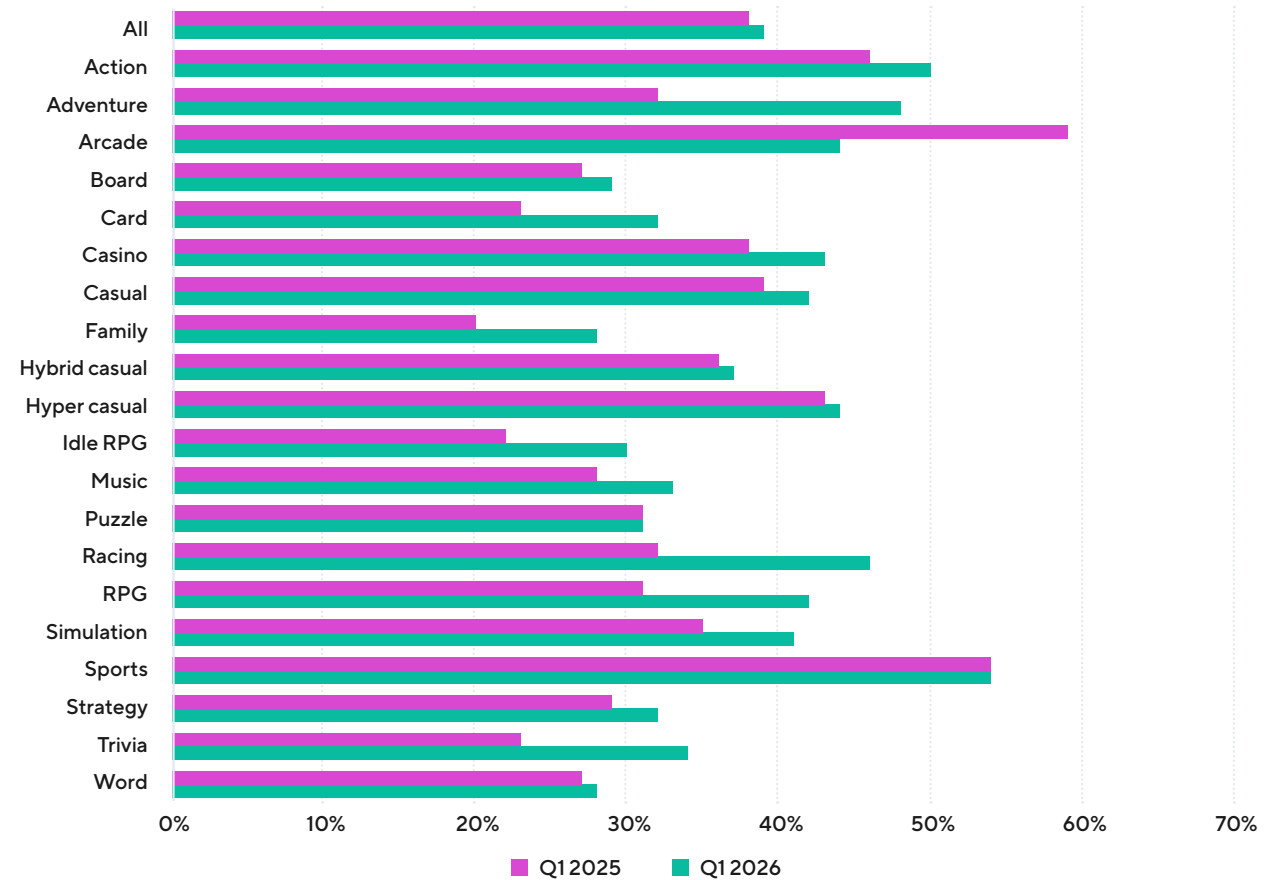
[PC & Console](#): Unify the player journey across mobile, PC, and console, with accurate measurement of cross-platform installs, engagement, and monetization.
- 

[Adjust Growth Copilot](#): Your AI-powered partner for smarter app growth.
- 

[TrueLink](#) for deep linking and additional solutions for [user engagement](#).

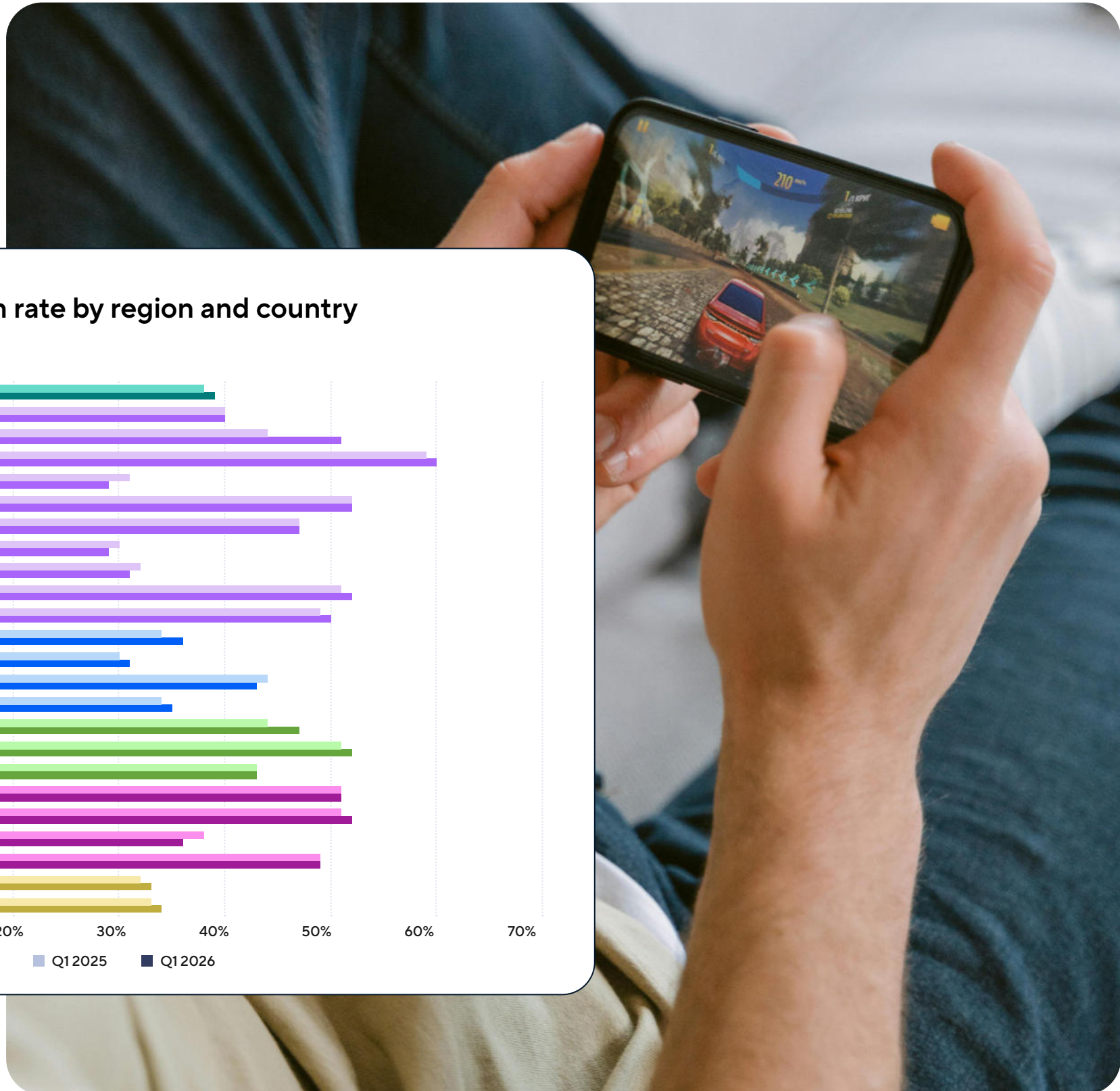
## A look at App Tracking Transparency (ATT) opt-in rates

Gaming app ATT opt-in rates Q1 2026 vs. Q1 2025 (Global)



Gaming App Tracking Transparency (ATT) opt-in rates continued to climb globally in Q1 2026. Among users shown the prompt on iOS, the opt-in rate reached 39%, up from 38% in Q1 2025. Adventure games had the largest increase, up from 32% to 38%. Trivia (34%), racing (46%), family (20%), card (32%), and RPG (42%) also saw boosts. Sports and action games had the highest rates overall, at 54% and 50%. Arcade was the only genre to decline, dropping from 50% to 46%.

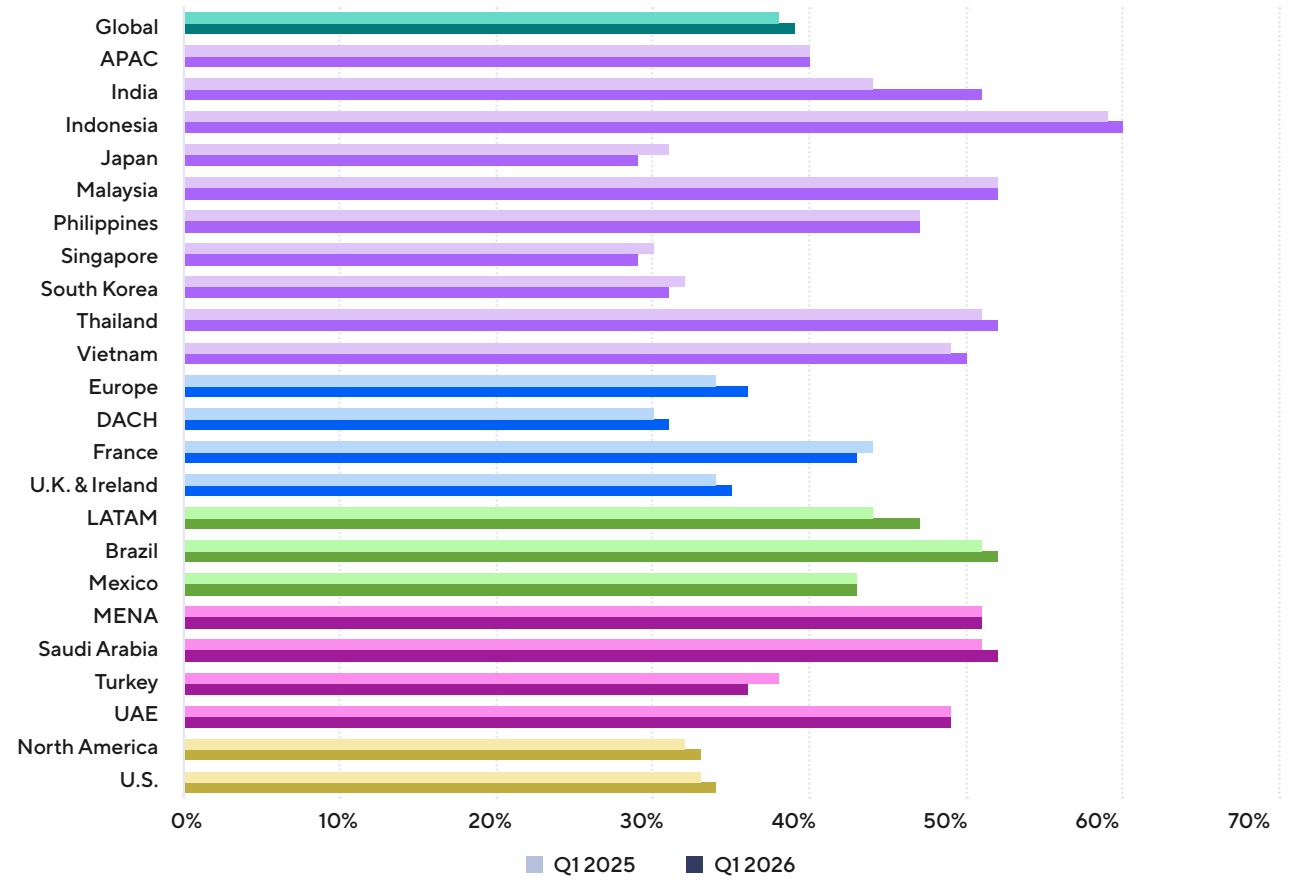
Mobile gamers are becoming more comfortable with consent prompts as developers continue to optimize timing and value messaging.



At the regional and country levels, India saw the largest jump in gaming app ATT opt-in rates, rising from 44% in Q1 2025 to 51% in Q1 2026. LATAM followed, climbing from 44% to 47%. Europe and North America also saw growth, with opt-in rates reaching 36% and 33%.

Indonesia had the highest ATT opt-in rate in Q1 2026 at 60%, while Saudi Arabia, Brazil, Thailand, and Malaysia all hit 52%.

**Gaming app ATT opt-in rate by region and country  
Q1 2026 vs. Q1 2025**



# Methodology

## VERTICALS:

Games (all), action, adventure, arcade, board, card, casino, casual, family, hybrid casual, hyper casual, idle RPG, music, puzzle, racing, role playing (RPG), simulation, slots, sports, strategy, swap, trivia, word.

## REGIONS:

Global, APAC, Europe, LATAM, MENA, North America

## COUNTRIES:

Austria, Brazil, France, Germany, India, Indonesia, Ireland, Japan, Malaysia, Mexico, Philippines, Saudi Arabia, Singapore, South Korea, Switzerland, Thailand, Turkey, United Arab Emirates (UAE), United Kingdom (U.K.), United States of America (U.S.), Vietnam.

## DATASET:




A mix of Adjust's top 5,000 apps and the total dataset of all apps tracked by Adjust. Our data comes from two sources, one including a list of 45 countries and one with approximately 250 based on the ISO 3166-1 standard. Data is based on aggregated, anonymized data from apps tracked by Adjust and may not reflect the entire global app market. Unless otherwise noted, all figures in this report come from Adjust data.




## DATE RANGE:

January 2024 - January 2026



# Key takeaways

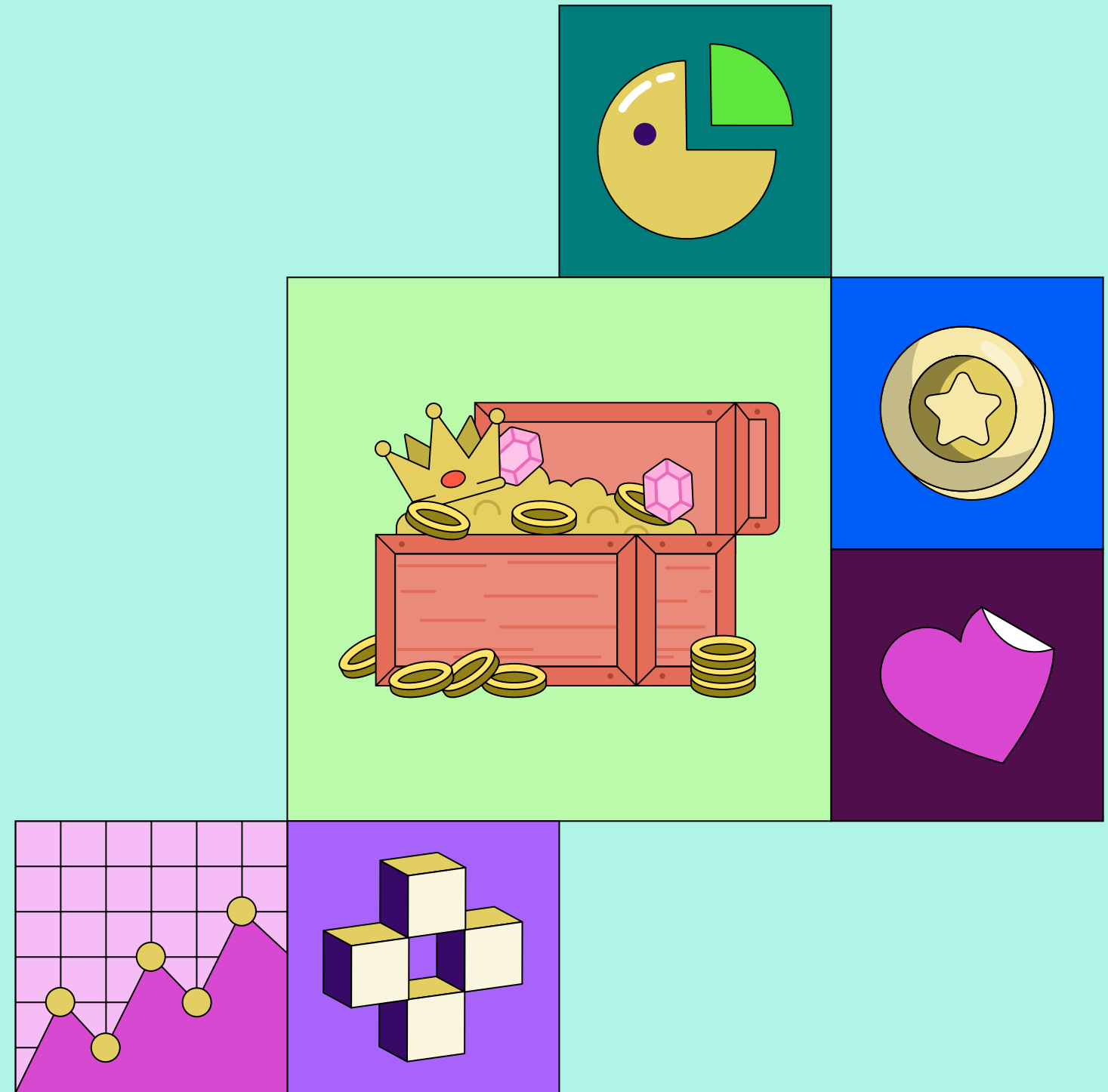
-  Global gaming app sessions increased by 1% YoY in 2025.
-  Paid-to-organic ratio jumped 61% globally (from 2.07 to 3.33).
-  Strategy games saw the biggest growth in sessions growth, up 57% YoY.

-  Hyper casual accounted for 29.1% of all gaming installs, and 15.3% of sessions.
-  The day 1 retention rate for all gaming apps was 27% in 2025.
-  Average partners per app declined from 6 to 5.3.

PART 1

# Game-changing insights for maximum impact

Top apps, install patterns, sessions, and retention rates



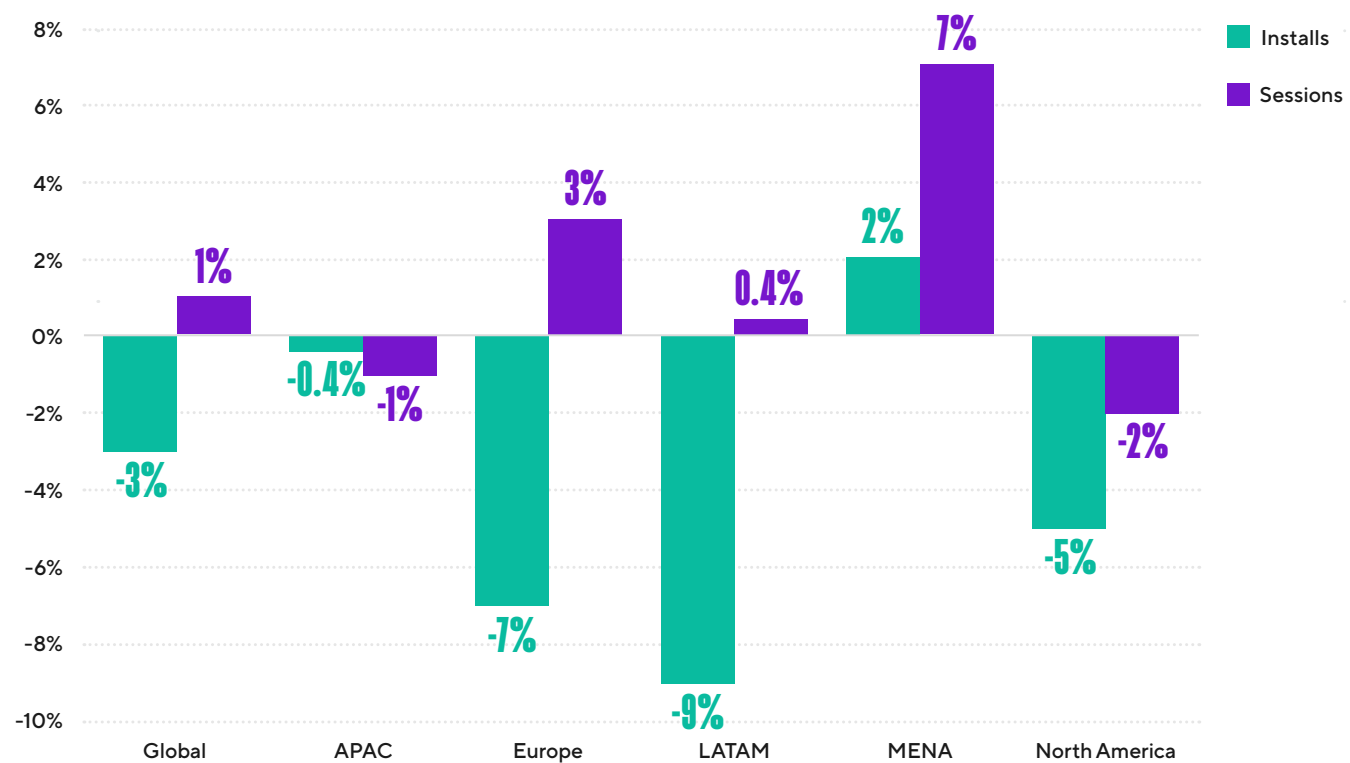
# Top 10 mobile games by downloads, 2025

	GLOBAL	APAC	EUROPE	LATAM	MENA	NORTH AMERICA
1	<b>Block Blast!</b> Puzzle	<b>Garena Free Fire</b> Action	<b>Block Blast!</b> Puzzle	<b>Roblox</b> Action, adventure	<b>Subway Surfers</b> Action, casual	<b>Block Blast!</b> Puzzle
2	<b>Roblox</b> Action, adventure	<b>Block Blast!</b> Puzzle	<b>Roblox</b> Action, adventure	<b>Garena Free Fire</b> Action	<b>Football League 2026</b> Sports	<b>Roblox</b> Action, adventure
3	<b>Garena Free Fire</b> Action	<b>Ludo King</b> Family, board	<b>Vita Mahjong</b> Card, board	<b>Block Blast!</b> Puzzle	<b>Garena Free Fire</b> Action	<b>Vita Mahjong</b> Card, board
4	<b>Subway Surfers</b> Action, casual	<b>Roblox</b> Action, adventure	<b>Subway Surfers</b> Action, casual	<b>Subway Surfers</b> Action, casual	<b>Block Blast!</b> Puzzle	<b>Royal Kingdom</b> Casual
5	<b>Pizza Ready!</b> Simulation	<b>Subway Surfers</b> Action, casual	<b>Hole.io</b> Sports, casual	<b>Pizza Ready!</b> Simulation	<b>Dream League Soccer 2026</b> Sports	<b>Fortnite</b> Action, adventure
6	<b>Ludo King</b> Family, board	<b>Pizza Ready!</b> Simulation	<b>Geometry Dash Lite</b> Arcade	<b>8 Ball Pool</b> Gametion	<b>EA SPORTS FC™ Mobile Soccer</b> Sports	<b>Clash Royal</b> Strategy
7	<b>Hole.io</b> Sports, casual	<b>Mobile Legends: Bang Bang</b> Strategy	<b>Clash Royal</b> Strategy	<b>Clash Royal</b> Strategy	<b>Pizza Ready!</b> Simulation	<b>Township</b> Puzzle, casual
8	<b>Vita Mahjong</b> Card, board	<b>FPS Strike Ops: Modern Arena</b> Action	<b>Paper.io 2</b> Casual	<b>Hole.io</b> Sports, casual	<b>FPS Strike Ops: Modern Arena</b> Action	<b>Color Block Jam</b> Puzzle
9	<b>EA Sports FC Mobile Soccer</b> Sports	<b>Indian Bikes Driving 3D</b> Action	<b>Pizza Ready!</b> Simulation	<b>Word Search Explorer</b> Word	<b>Extreme Car Driving Simulator</b> Racing	<b>Subway Surfers</b> Action, casual
10	<b>My Talking Tom 2: Pet Game</b> Casual	<b>My Talking Tom 2: Pet Game</b> Casual	<b>Snake Clash!</b> Simulation	<b>Snake.io</b> Action	<b>Royal Match</b> Dream Games	<b>Magic Tiles 3 - Piano Game</b> Music

Source: SensorTower

Globally, app sessions increased 1% YoY in 2025. MENA reported 2% install growth and a 7% rise in sessions. In Europe and LATAM, installs dropped 7% and 9%, while sessions increased 3% and 0.4%. APAC and North America declined just slightly across both metrics.

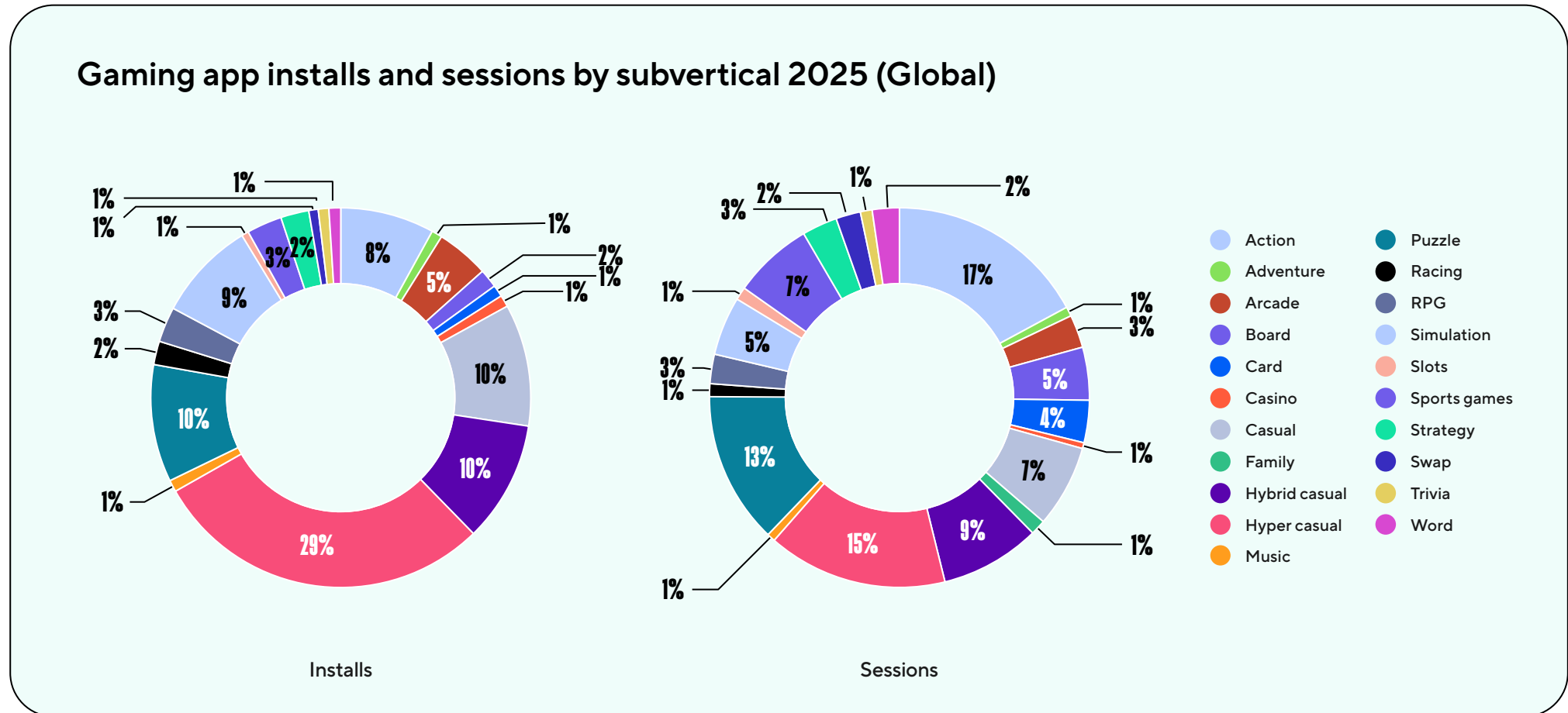
**Gaming app install and session growth percentages  
YoY 2024 - 2025**



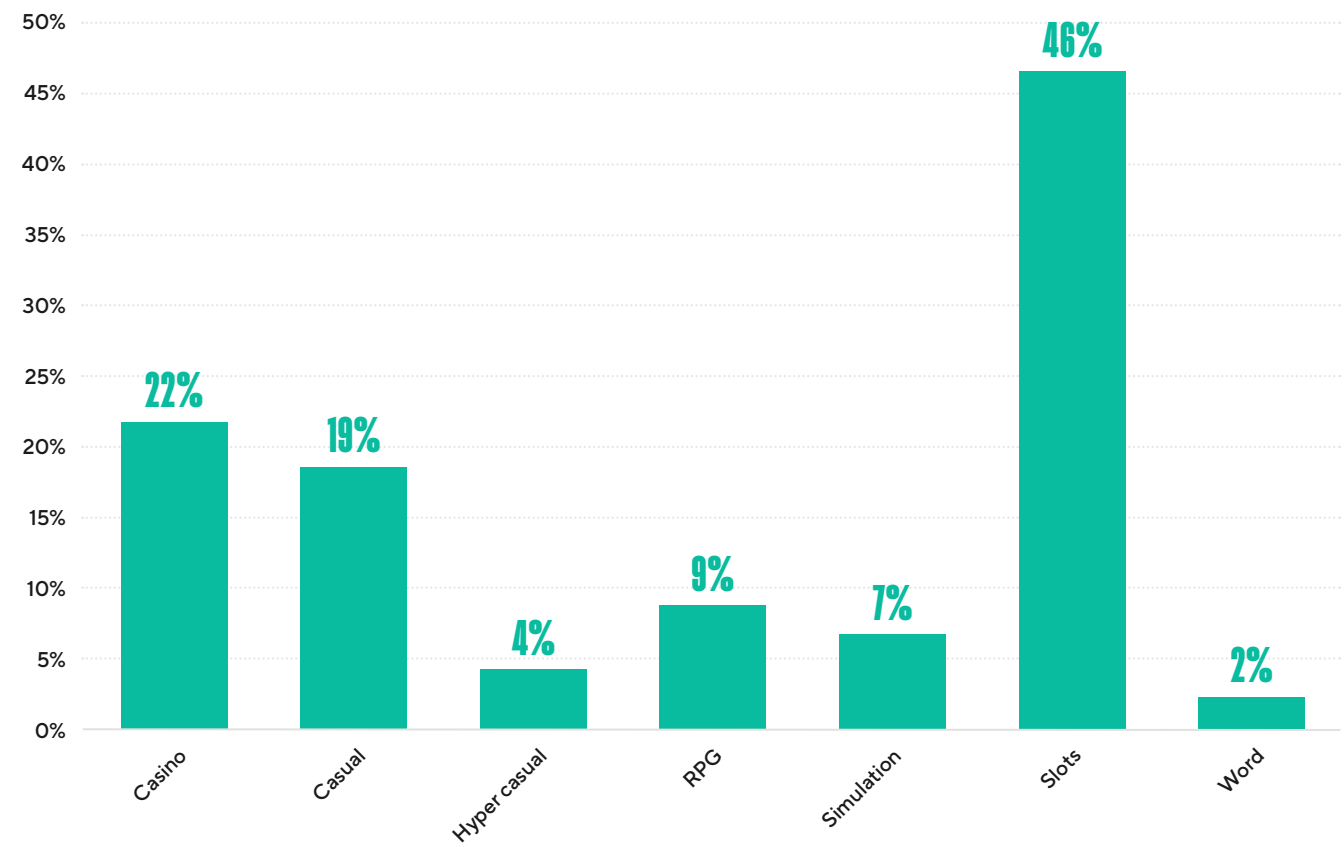
In 2025, hyper casual games continued to account for the largest share of gaming installs, at 29.1%, up from 27% in 2024. While its contribution to sessions (15%) was comparatively smaller, this is a big YoY jump from 11%, showing that player retention in a genre known for high churn is, as trends suggest, increasing. Similar to the hybrid casual vertical, hyper casuals are increasingly incorporating light progression systems and in-app purchase mechanisms to increase session lengths and revenue per user.

Casual and hybrid casual games each had just over 10% of installs, along with 7% and 8.5% of sessions, respectively. Puzzle games made up 10% of installs but achieved a higher 12.9% share of sessions. Action games showed a similar pattern, with 8% of installs but more than double that share in sessions at 17.1%. Simulation games accounted for 8.5% of installs and 5% of sessions, while sports games had 3% of installs and 6.8% of sessions. The strategy, RPG, and racing genres each remained under 3% of total installs.

Genres such as action and puzzle generate a larger share of sessions relative to installs. These games are structured around repeat play and long-term progression, which supports hybrid monetization models that combine in-app purchases and ad revenue.

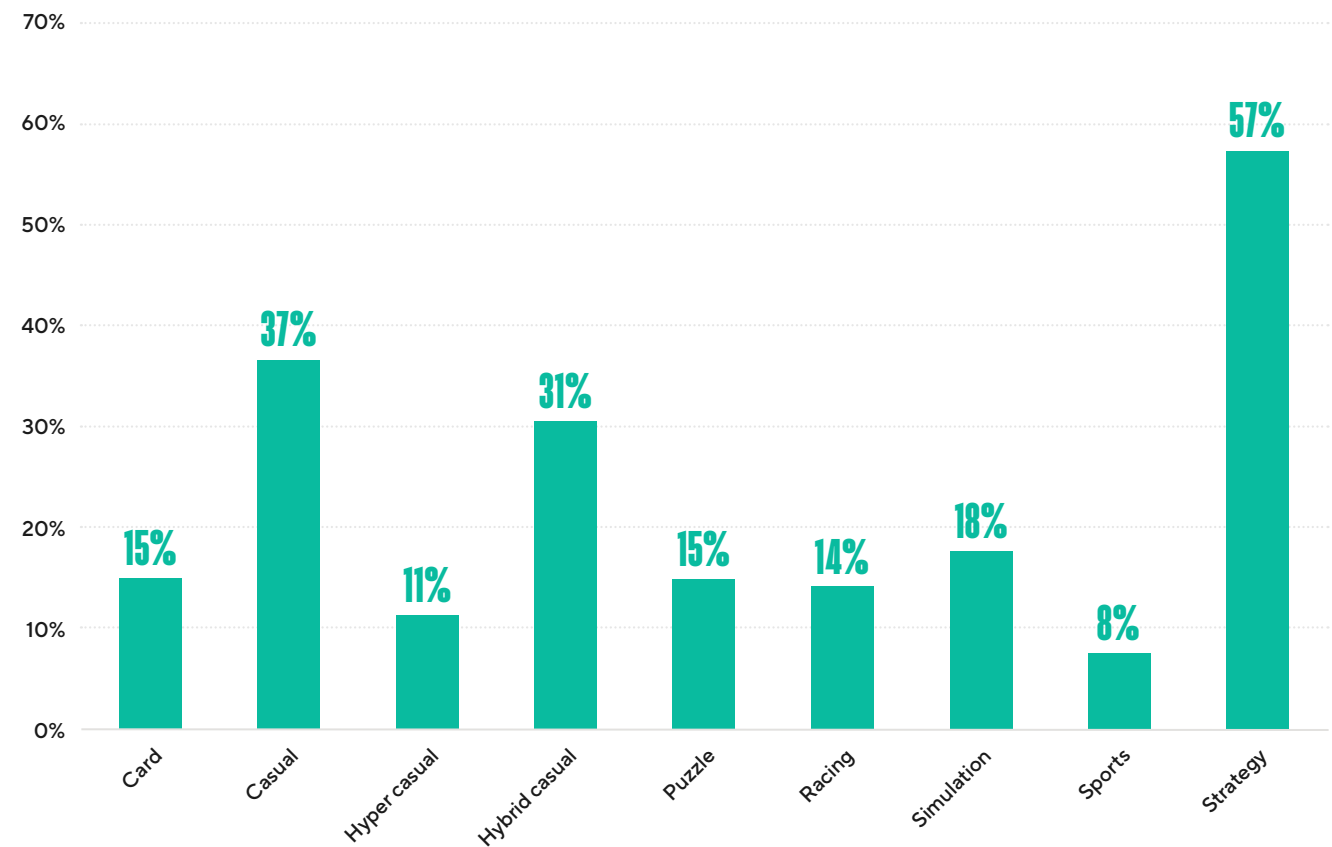


**Gaming app install growth perctanges by subvertical YoY 2024 - 2025 (Global)**



In 2025, YoY install growth was highest for slots games at 46%, followed by casino (22%) and casual games (19%). RPG and simulation saw smaller increases of 9% and 7%, while hyper casual and word games had gains of 4% and 2%, respectively.

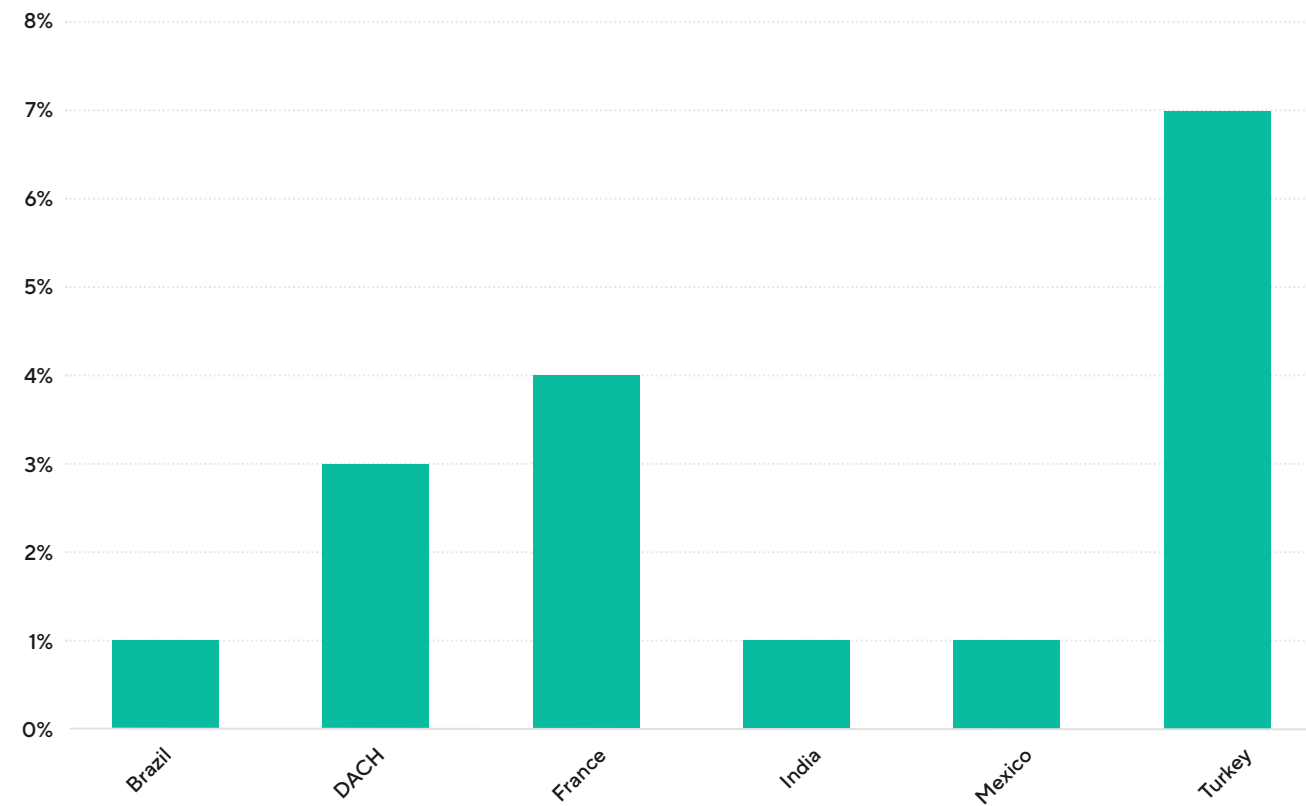
**Gaming app session growth perctanges by subvertical YoY 2024 - 2025 (Global)**



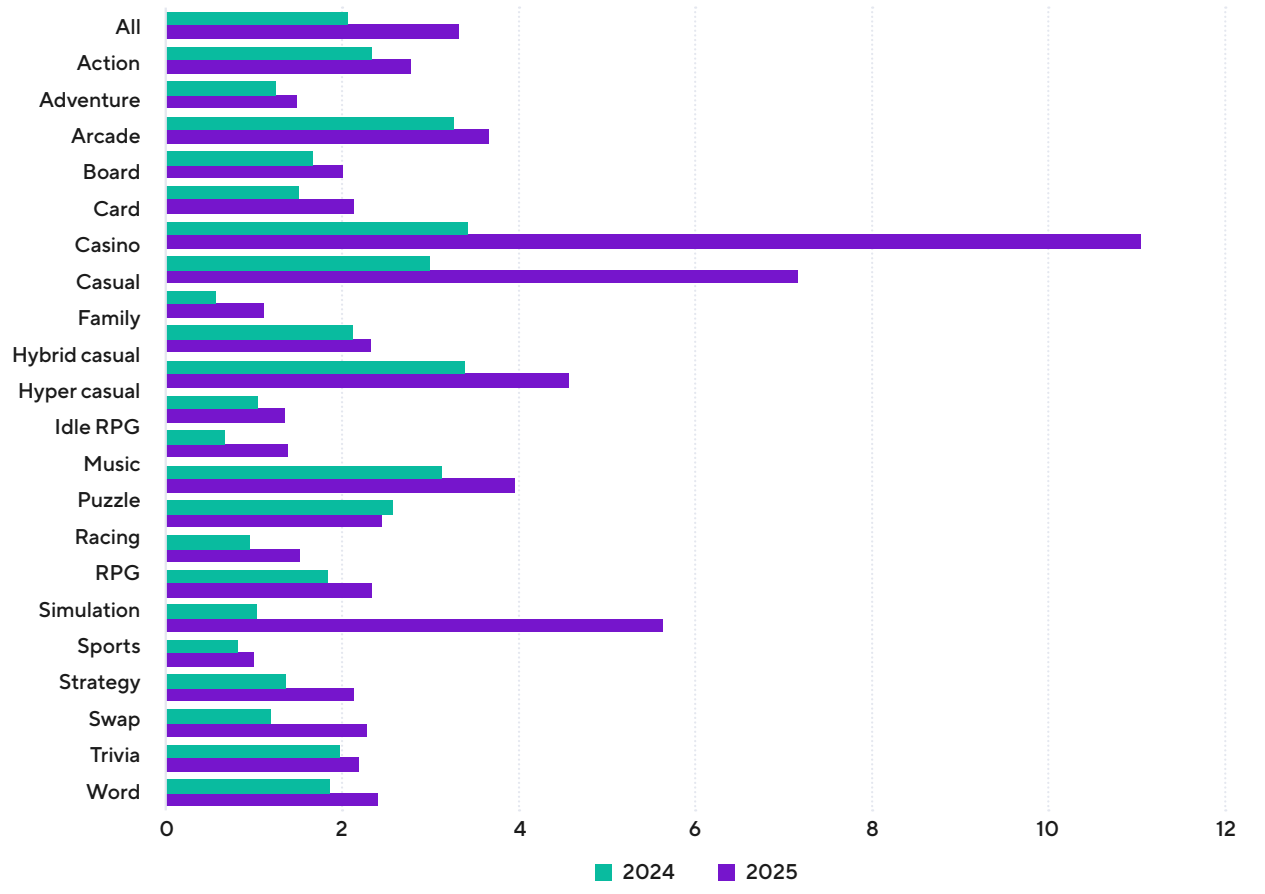
Strategy topped all subverticals with a 57% rise in sessions. Casual sessions grew 37%, and hyper casual sessions increased 31%. Simulation and card games both saw double-digit session growth of 18% and 15%, while puzzle and racing rose 15% and 14%. Sports sessions grew by 8%.

When looking at session growth at the subregion and country levels, Turkey had a YoY increase of 7%. France and DACH followed with 4% and 3%, while Brazil, India, and Mexico saw 1% boosts.

**Gaming app session growth percentages YoY by country 2024 - 2025**



### Gaming app paid/organic ratio 2024 - 2025 (Global)



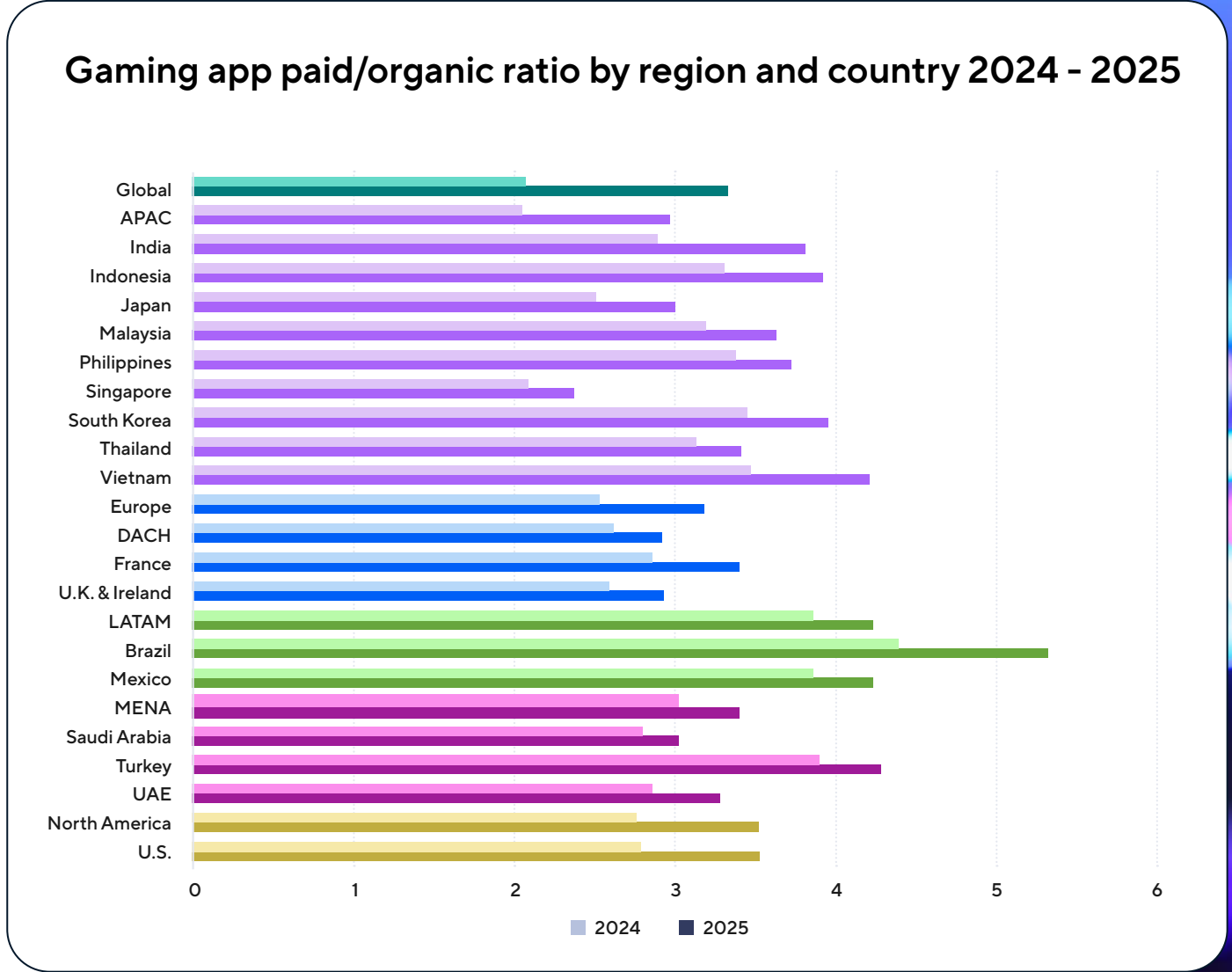
Gaming paid-to-organic ratios climbed across almost every gaming subvertical from 2024 to 2025, with the global median increasing from 2.07 to 3.33 (+61%).

Casino titles had the highest ratio (11.05), up 223% from the 2024 figure. Slots and casual games also saw large jumps, increasing 139% and 446%, respectively. Hyper casual grew from 3.39 to 4.56 (+35%).

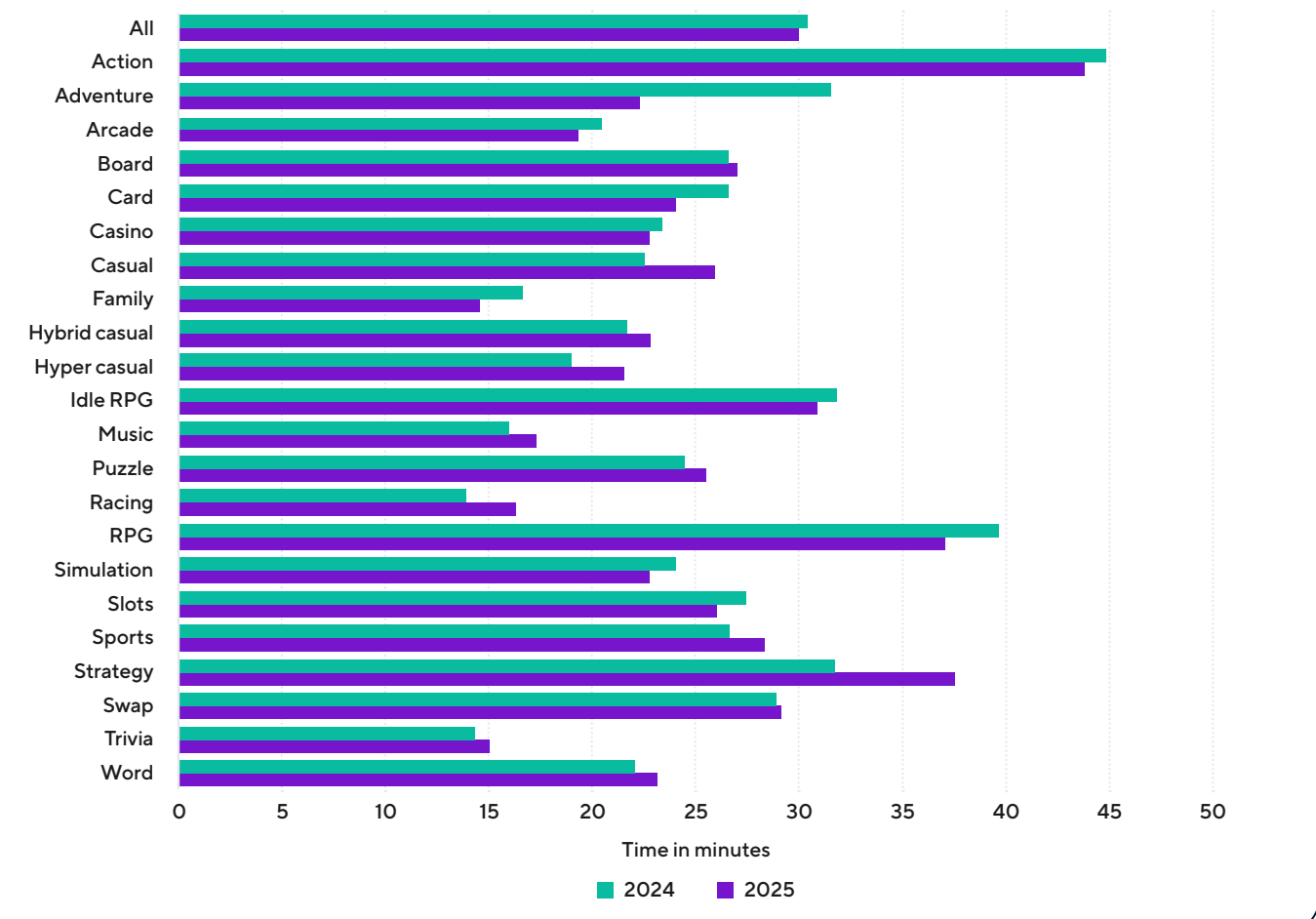


In 2025, the paid/organic ratio grew across all regions. APAC had the biggest jump, up 45% from 2.05 to 2.97. North America followed with a 28% increase (2.76 to 3.52). Europe's ratio increased 26%, from 2.53 to 3.18. LATAM saw a 10% rise (3.86 to 4.23), and MENA's ratio climbed from 3.02 to 3.4 (+13%).

Looking at individual countries, India experienced a 32% increase (2.89 to 3.81) and the U.S. saw a 27% increase (2.79 to 3.53). Brazil had the highest ratio at 5.32, (+31%), and Turkey's ratio grew 10% YoY to reach 4.28 in 2025.



### Gaming app session lengths 2024 - 2025 (Global)



Notable changes in gaming session lengths include: Strategy getting the biggest boost, up 18% from 31.72 to 37.51 minutes. Racing grew by 17% to 16.33 minutes, while casual and hyper casual games increased by 15% and 13%.

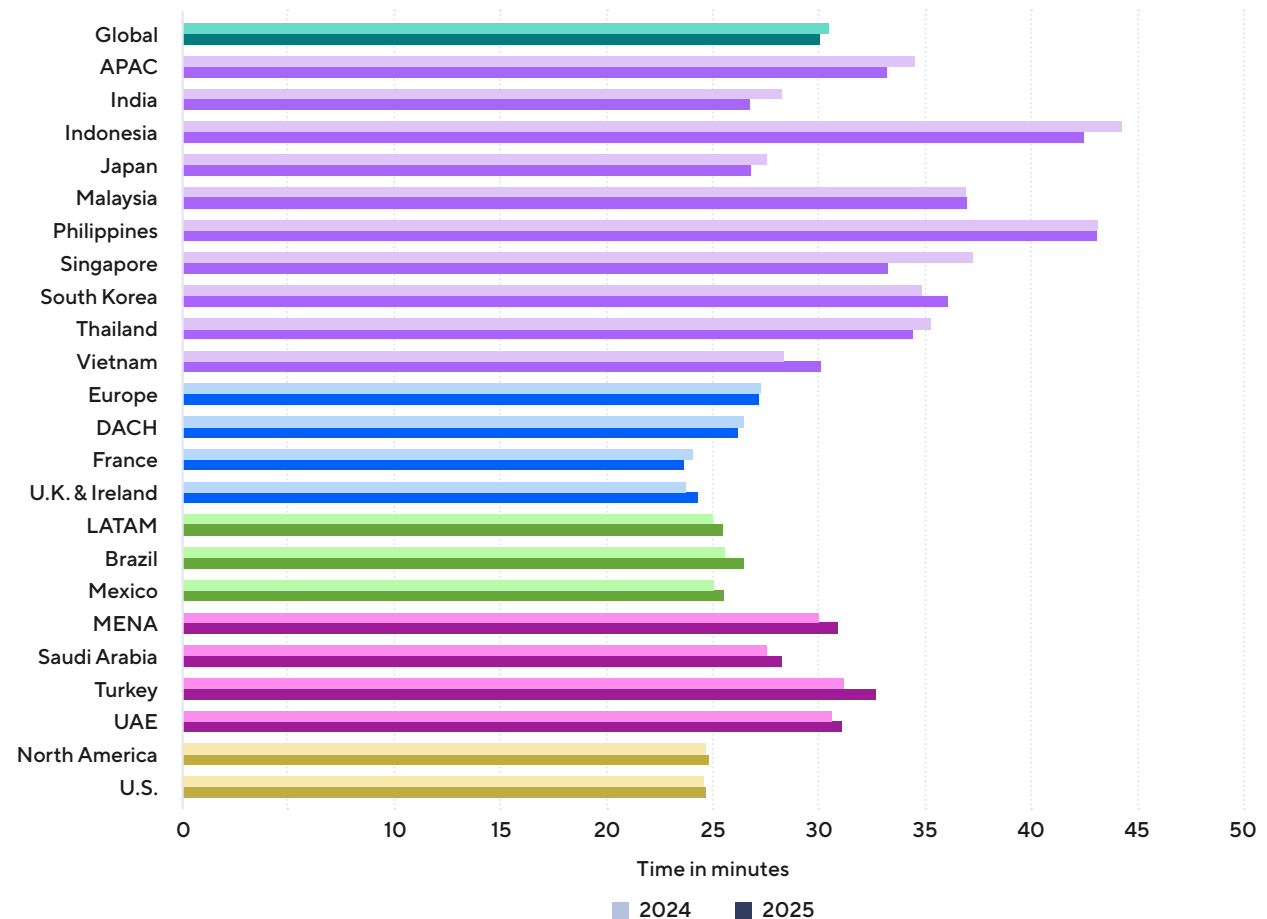
Music, sports, word, trivia, hybrid casual, and puzzle game sessions all grew between 4% and 8%. Although session lengths for action games decreased slightly, it still had the longest average session length at 43.8 minutes, followed by strategy.

In MENA, gaming app session lengths increased 3%, rising from 29.99 to 30.88 minutes. Turkey saw the largest gain in the region, up 5% from 31.14 to 32.64 minutes, followed by Saudi Arabia: up 3% to 28.23 minutes.

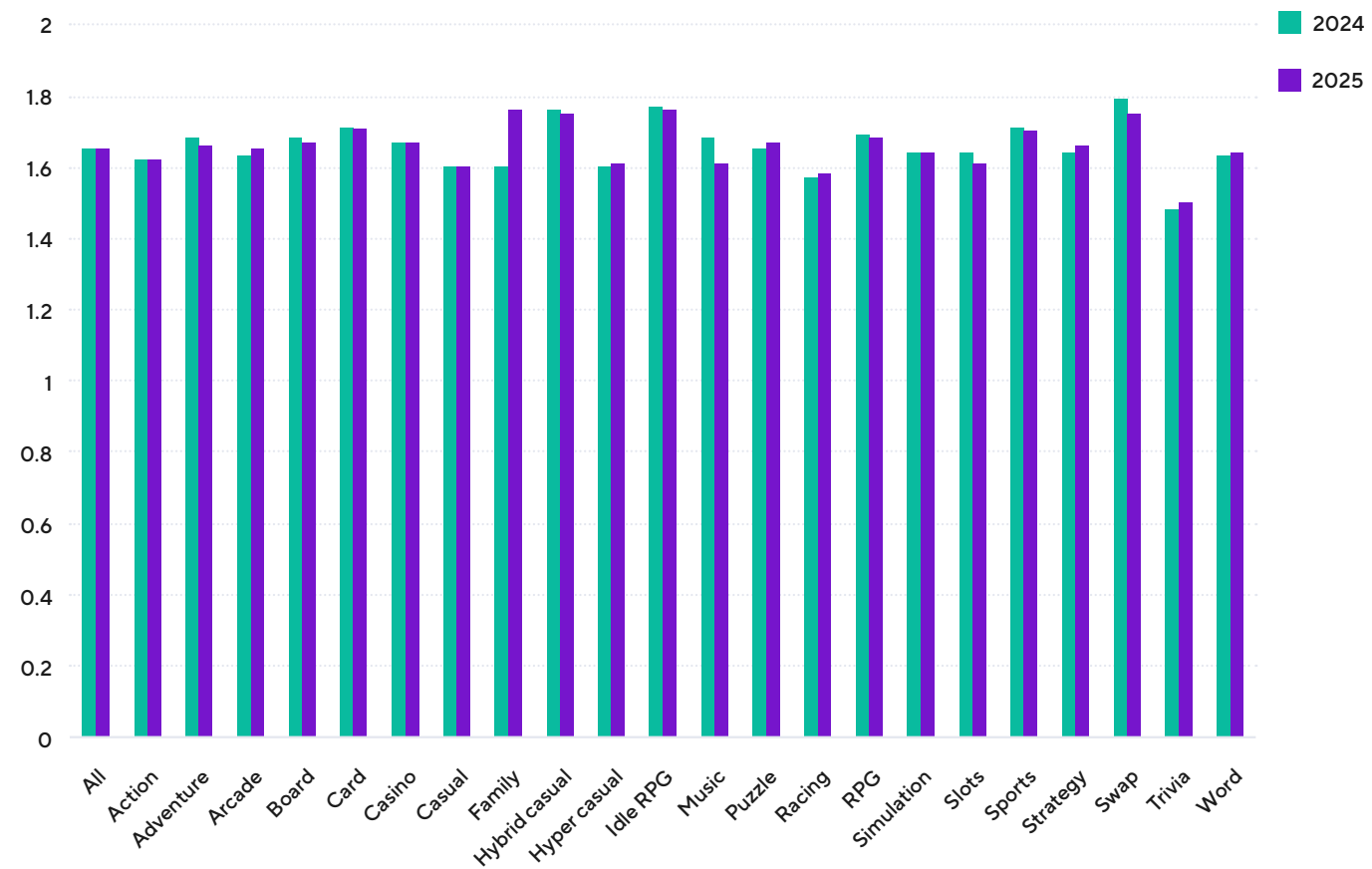
LATAM had a YoY increase of 2%, reaching 25.44 minutes. Brazil and Mexico grew 3% and 2% (26.43 and 25.54 minutes).

In 2025, Europe's session length hovered around 27.15 minutes, while North America's averaged 24.65 minutes. Gaming session lengths in APAC declined 4% YoY, dropping from 34.48 to 33.14 minutes.

Gaming app session lengths by region and country 2024 - 2025



### Gaming app sessions per user per day on day 0 2024 - 2025 (Global)



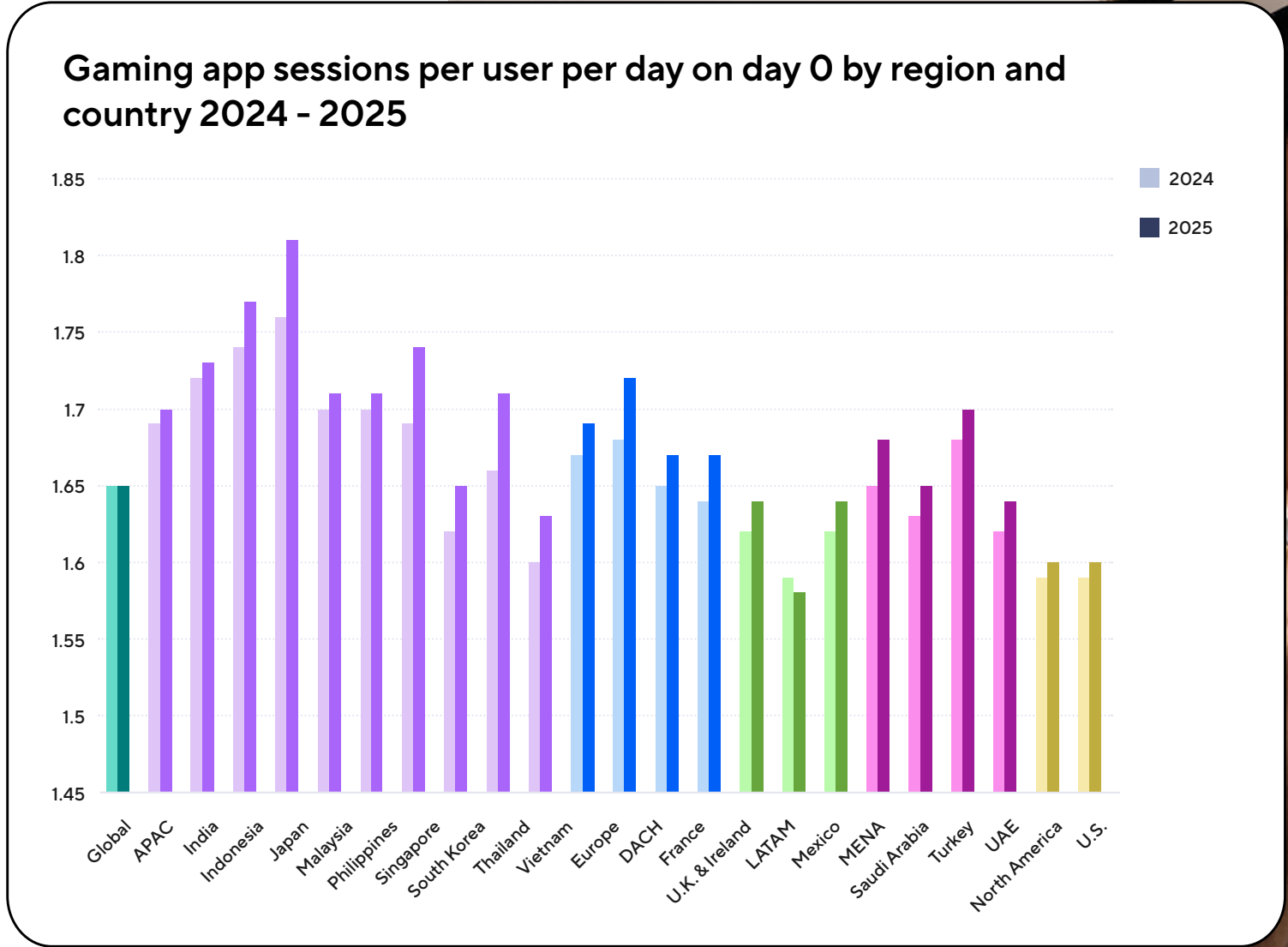
Gaming app day 0 sessions per user were stable at 1.65 in 2025, with most subverticals seeing only small changes of about 1% up or down.

Family games jumped 10% from 1.6 to 1.76 sessions per user. Music, sports, and trivia saw small declines, while genres like arcade, hyper casual, puzzle, racing, swap, and word increased by about 1%.

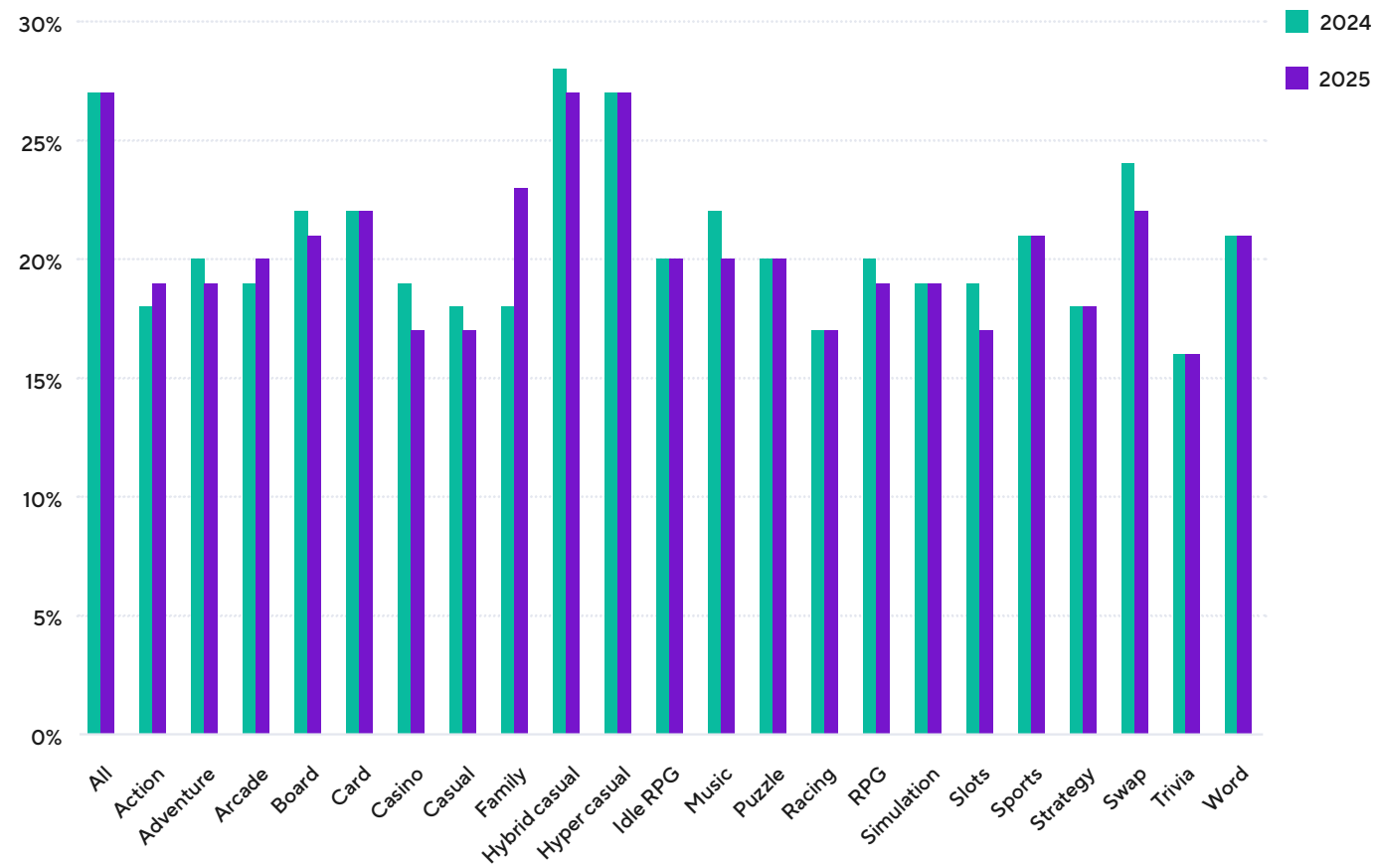


Most regions saw slight YoY growth, with increases ranging from 1% to 3%. APAC increased from 1.69 to 1.70, but some countries outperformed the regional average. Japan saw a 3% jump, growing from 1.76 to 1.81. Singapore and Thailand also posted 3% gains, while Indonesia, South Korea, and Vietnam each grew by 2%.

Europe climbed from 1.67 to 1.69, with DACH and the UK & Ireland up 2%. LATAM increased from 1.62 to 1.64 and MENA saw a 2% increase. North America moved 1.59 to 1.6.

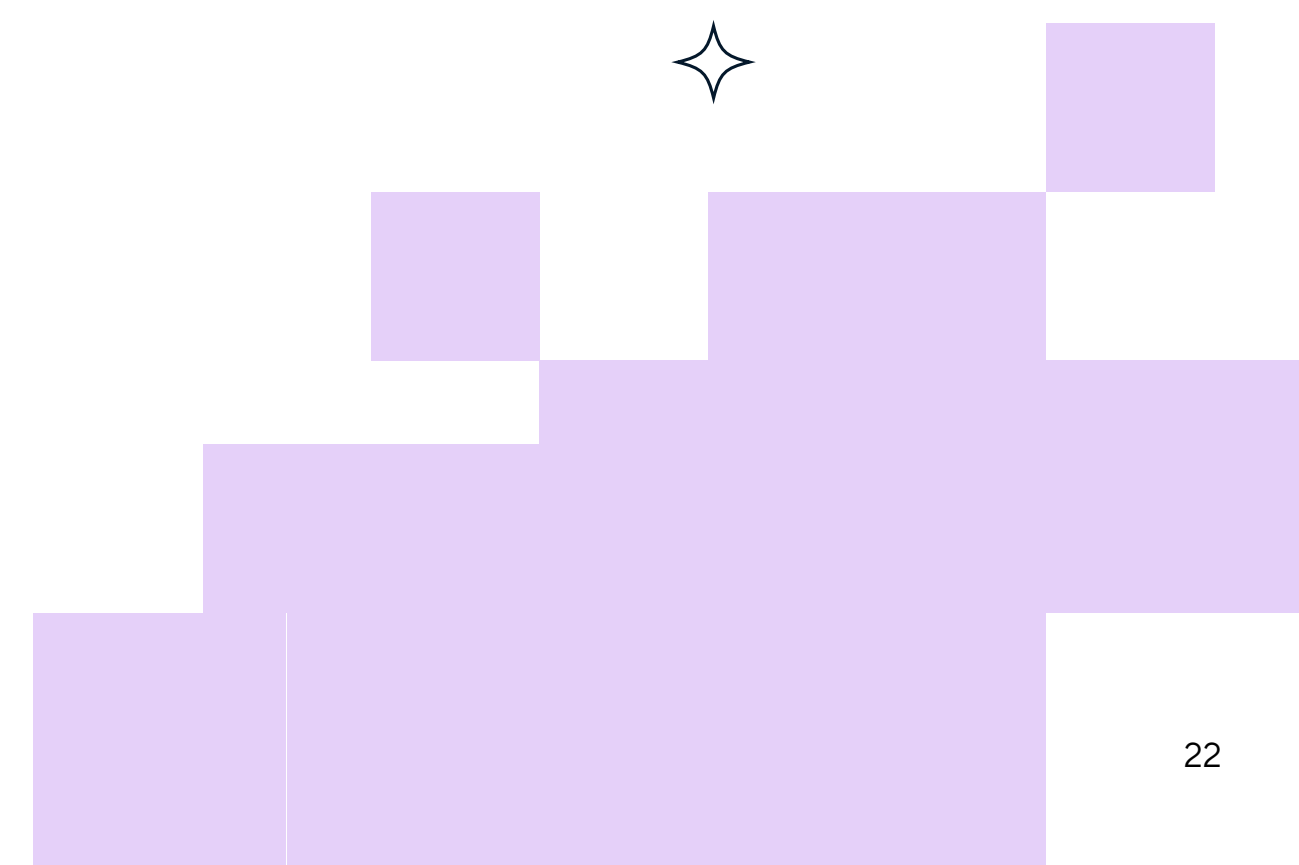


### Gaming app day 1 retention rate 2024 - 2025 (Global)



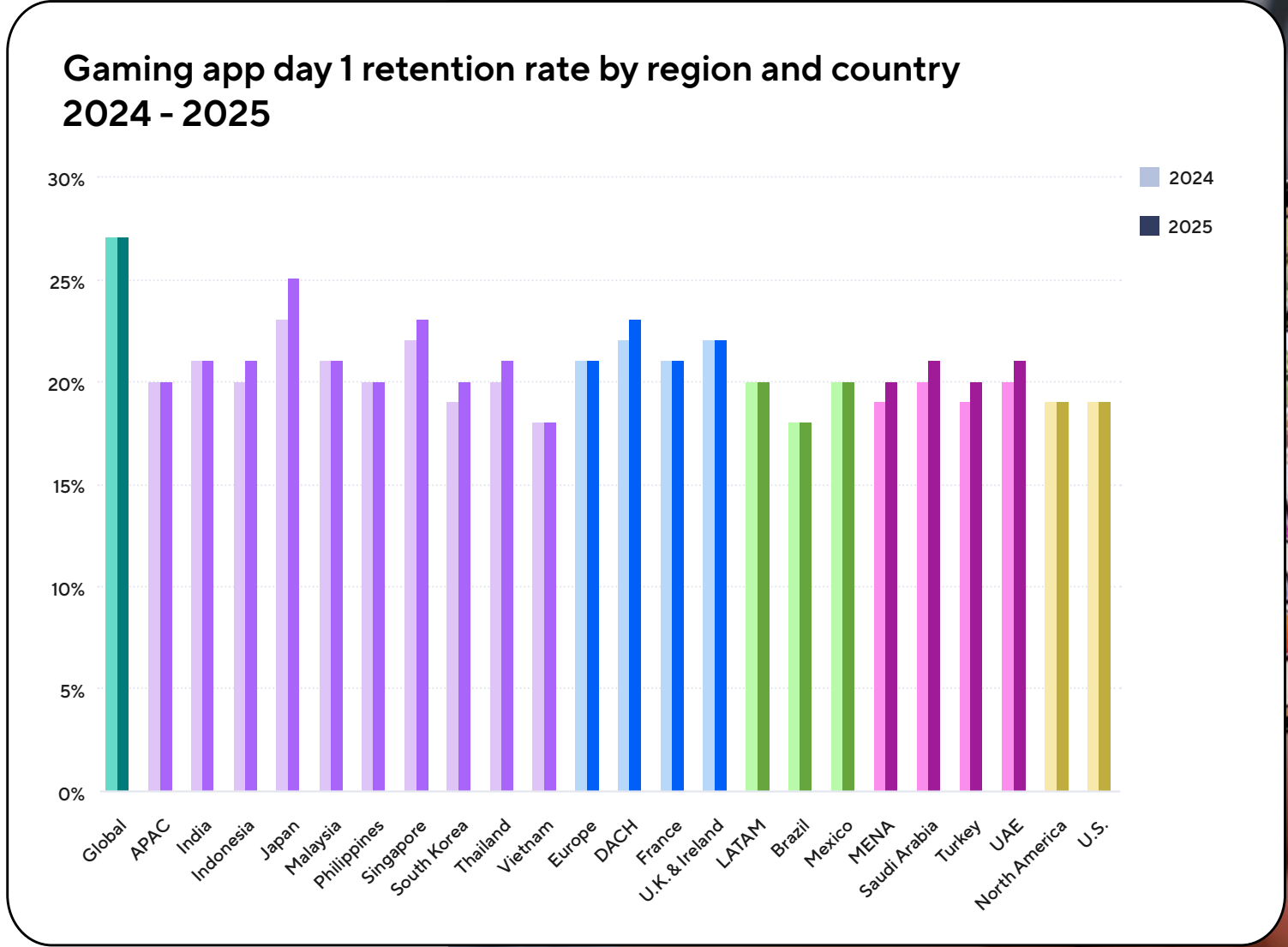
Overall, the day 1 gaming app retention rate remained stable YoY in 2025 (27%), with most subverticals following the same pattern. Family games had the most growth, rising five percentage points from 18% to 23%. Action (18% to 19%) and arcade (19% to 20%) also increased.

Hybrid casual and hyper casual had the highest day 1 retention rates in 2025, both 27%.



In most regions and countries, day 1 retention rates were stable in 2025, with APAC at 20%, Europe at 21%, LATAM at 20%, and North America at 19%. MENA increased from 19% to 20%. In Saudi Arabia and the UAE individually, rates rose to 21%.

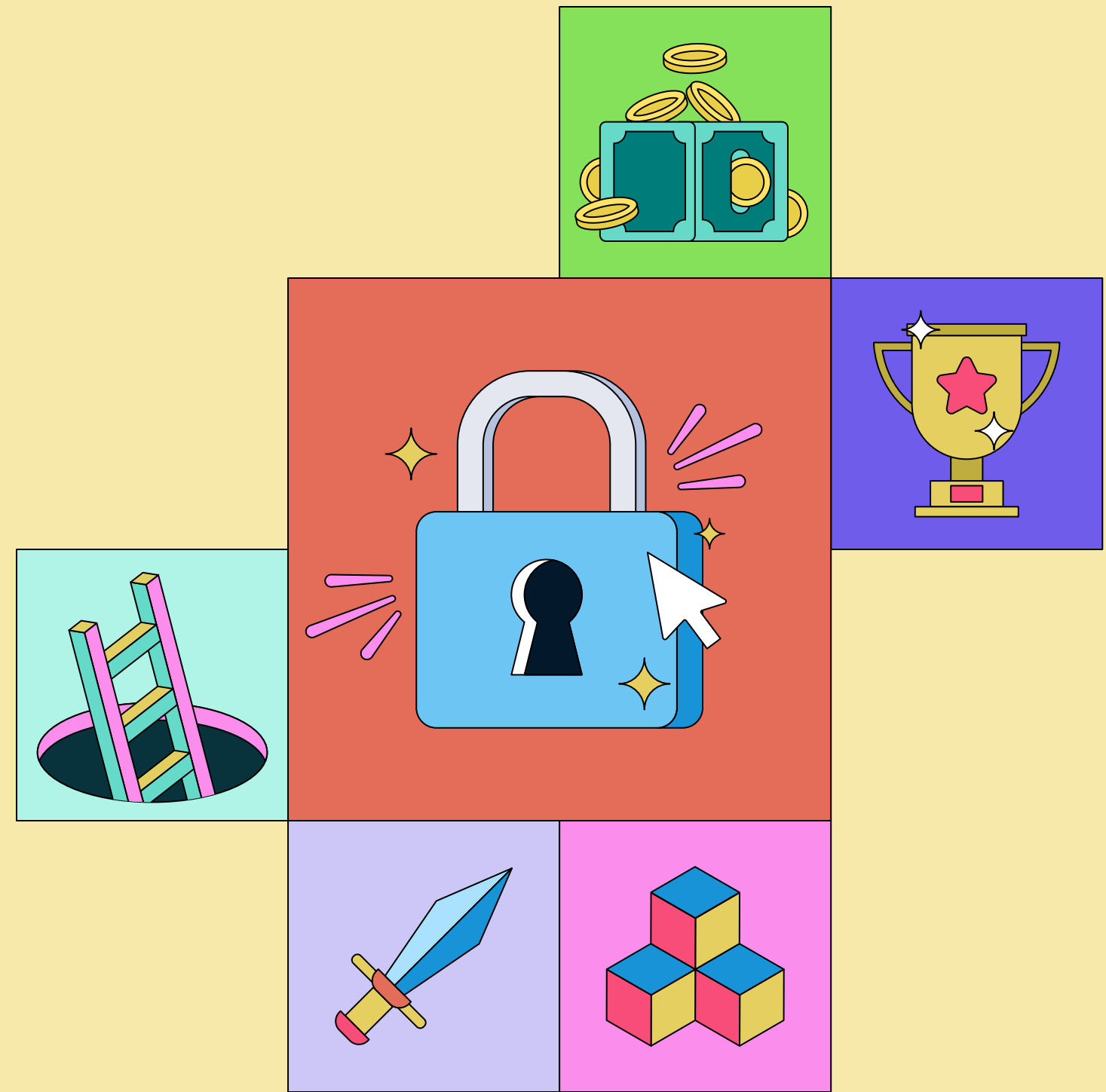
Within APAC, several countries increased YoY. Japan jumped most and had the highest overall rate (25%). Singapore reached 23%, Thailand and Indonesia 21%, and South Korea 20%.



PART 2

# Cracking the code on cost and performance

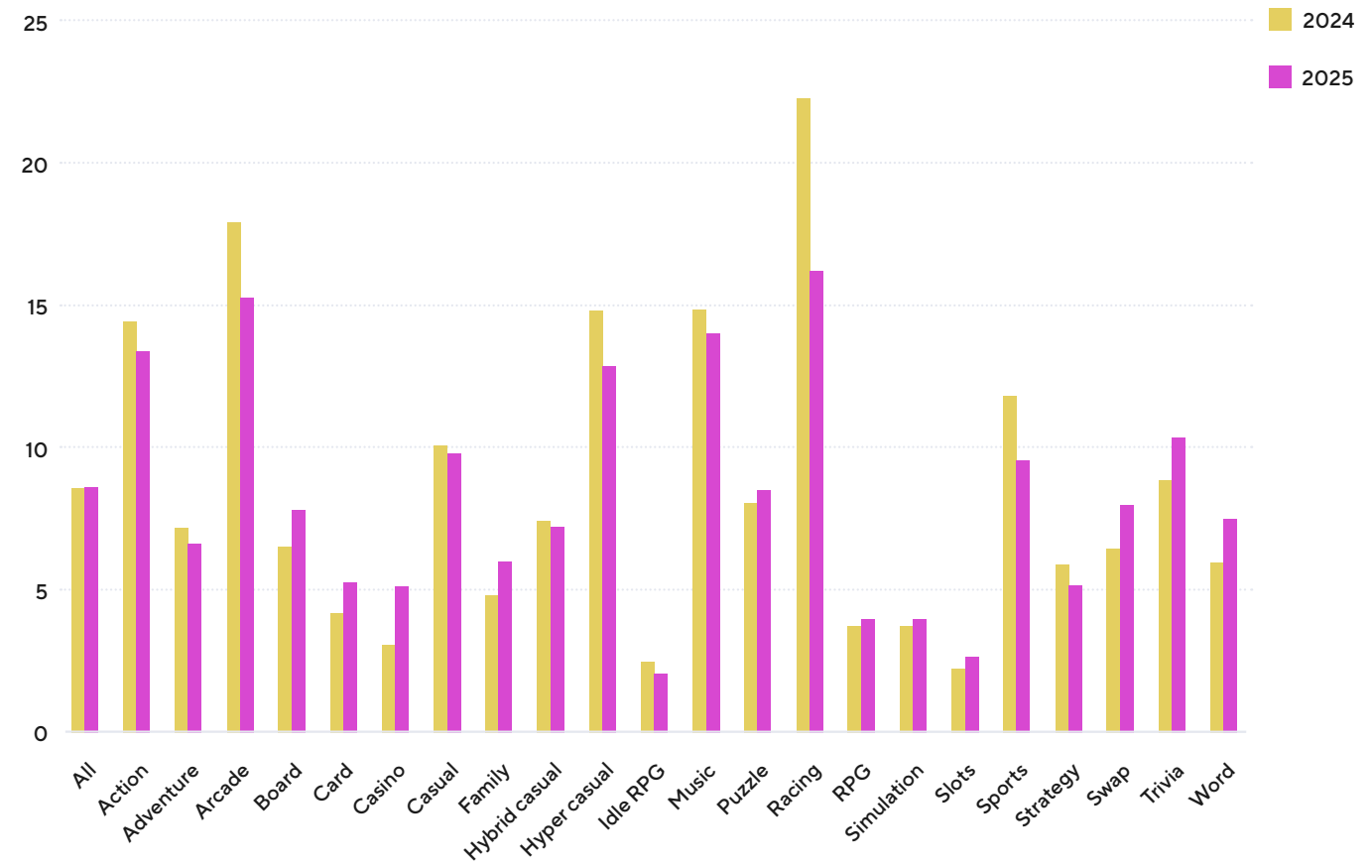
Cost per install, impression, and click + partners per app





The genres most successful at turning impressions into installs are those offering clear value and fun personalized/on-message gameplay. This boost in efficiency is partly due to studios using GenAI to rapidly test new gameplay ideas, ad creatives, and localized content. Machine learning has also played a critical role in identifying audiences most likely to install and engage, enabling smarter, more focused campaigns.

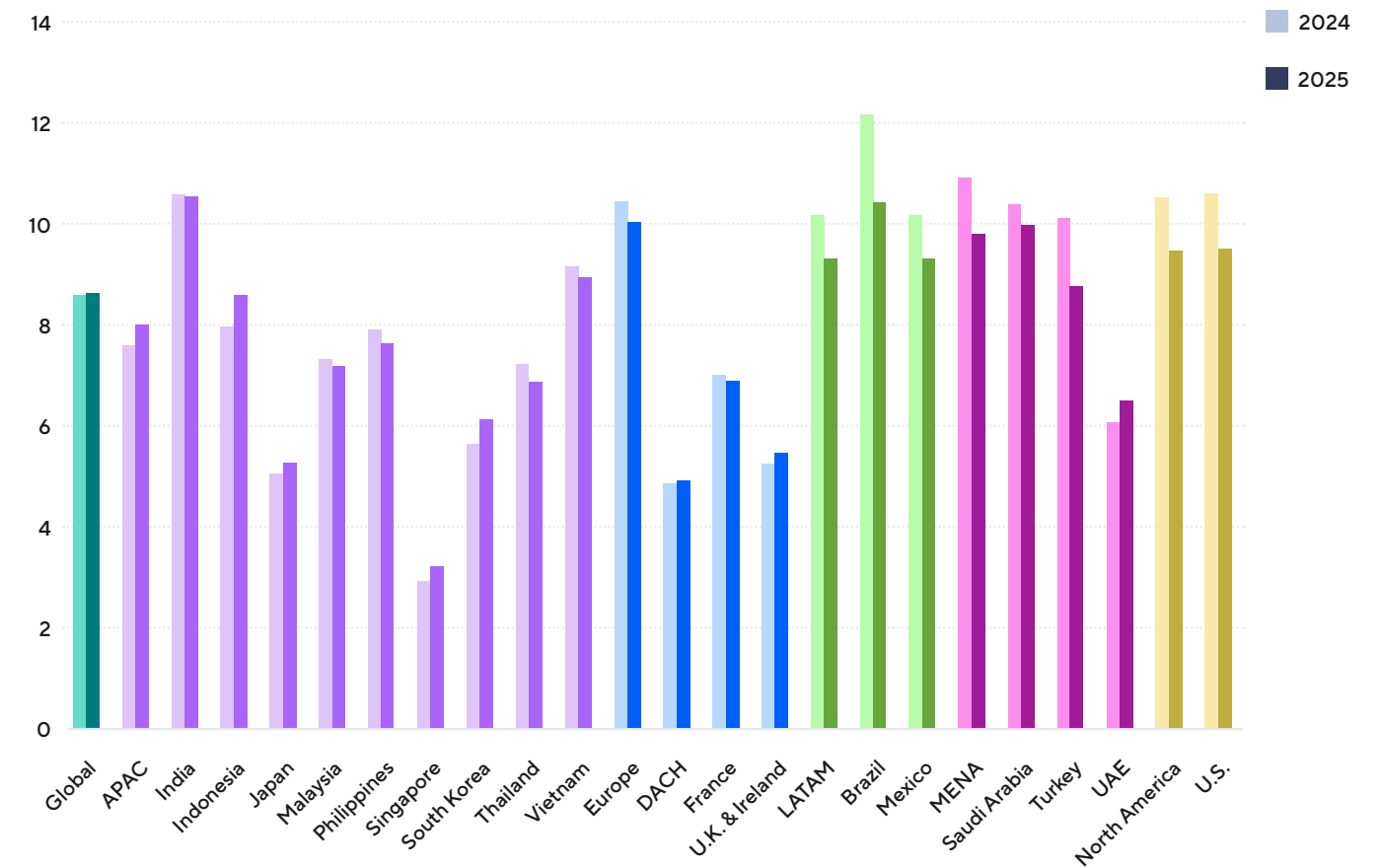
### Gaming app IPM 2024 - 2025 (Global)



Globally, installs per mille (IPM) for gaming apps increased from 8.59 in 2024 to 8.62 in 2025. Racing games declined, but still had the highest IPM among all subgenres at 16.2. Casino games had the biggest increase, growing 65% to 5.13. Word games climbed from 5.97 to 7.52, and card games from 4.18 to 5.2. Swap, family, board, and slots also increased.

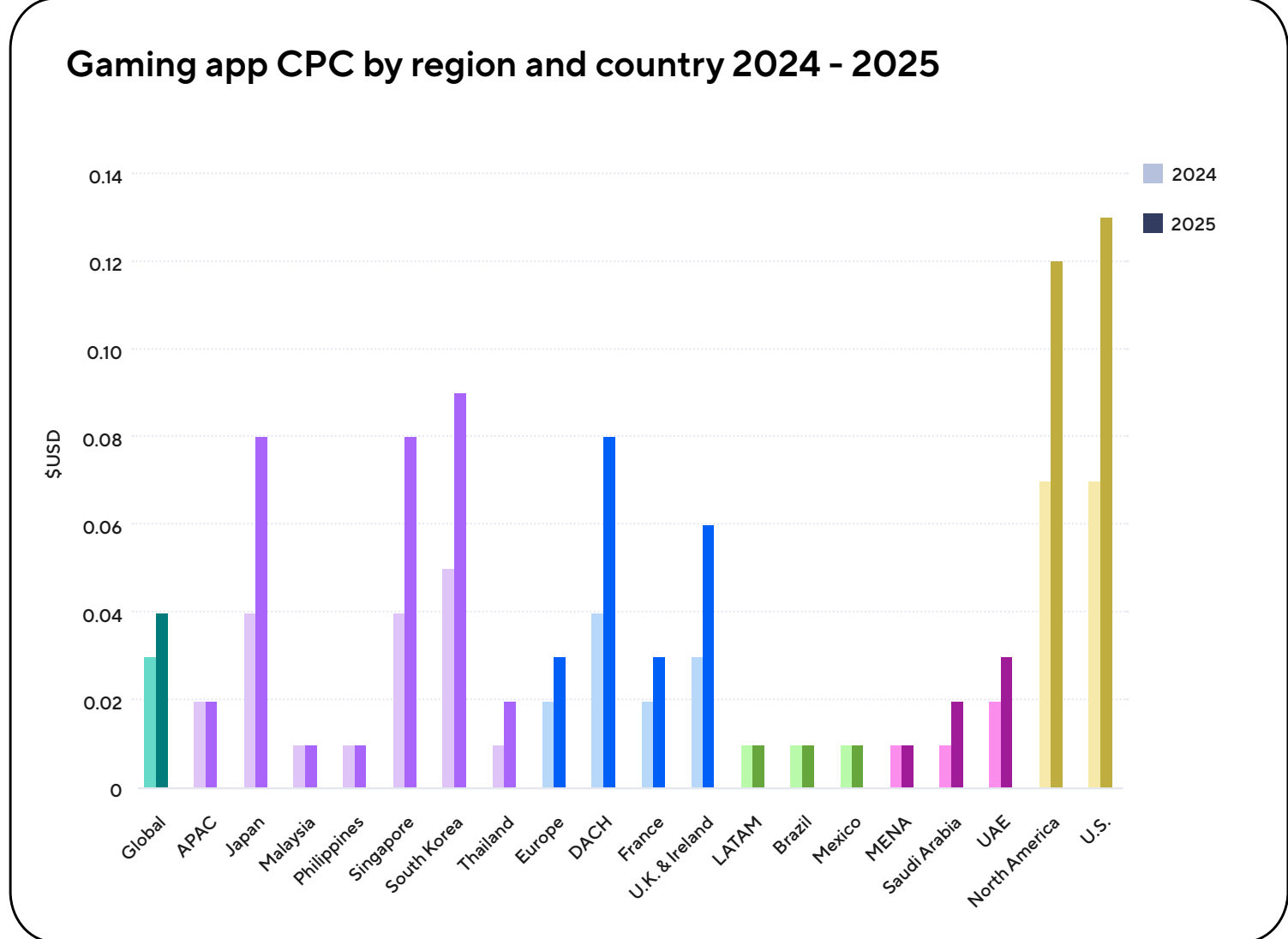
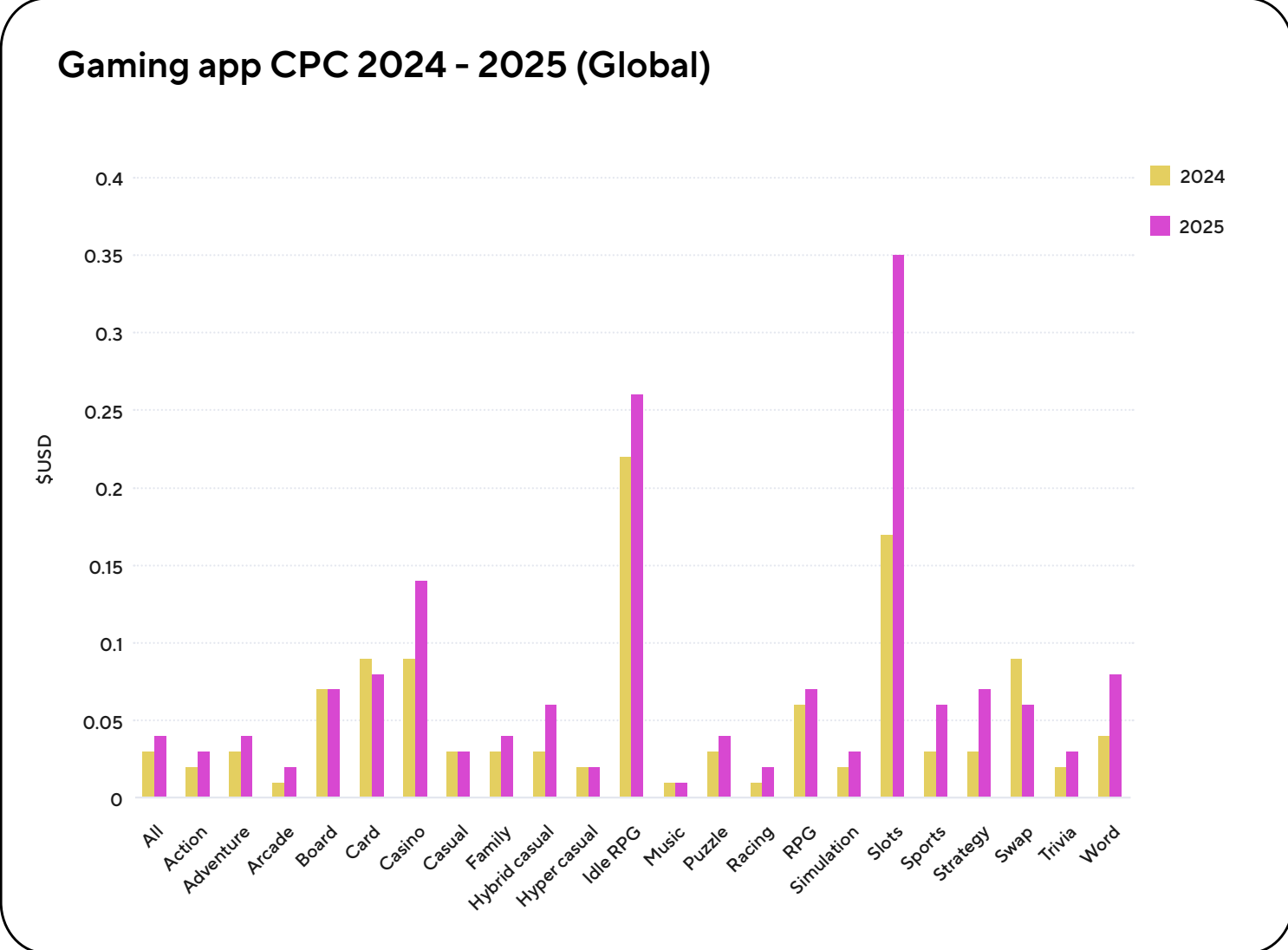


Gaming app IPM by region and country 2024 - 2025



IPM decreased in most regions and countries, but increased in APAC by 5%, from 7.59 in 2024 to 8 in 2025. Within APAC, Singapore grew 10%, reaching 3.23, South Korea increased by 9%, reaching 6.13, Indonesia reached 8.58 (+8%), and Japan reached 5.27 (+4%).

In Europe, DACH grew by 1% to 4.92, while the U.K. and Ireland increased by 4% to 5.46. In MENA, the UAE rose 7%, from 6.06 to 6.49.



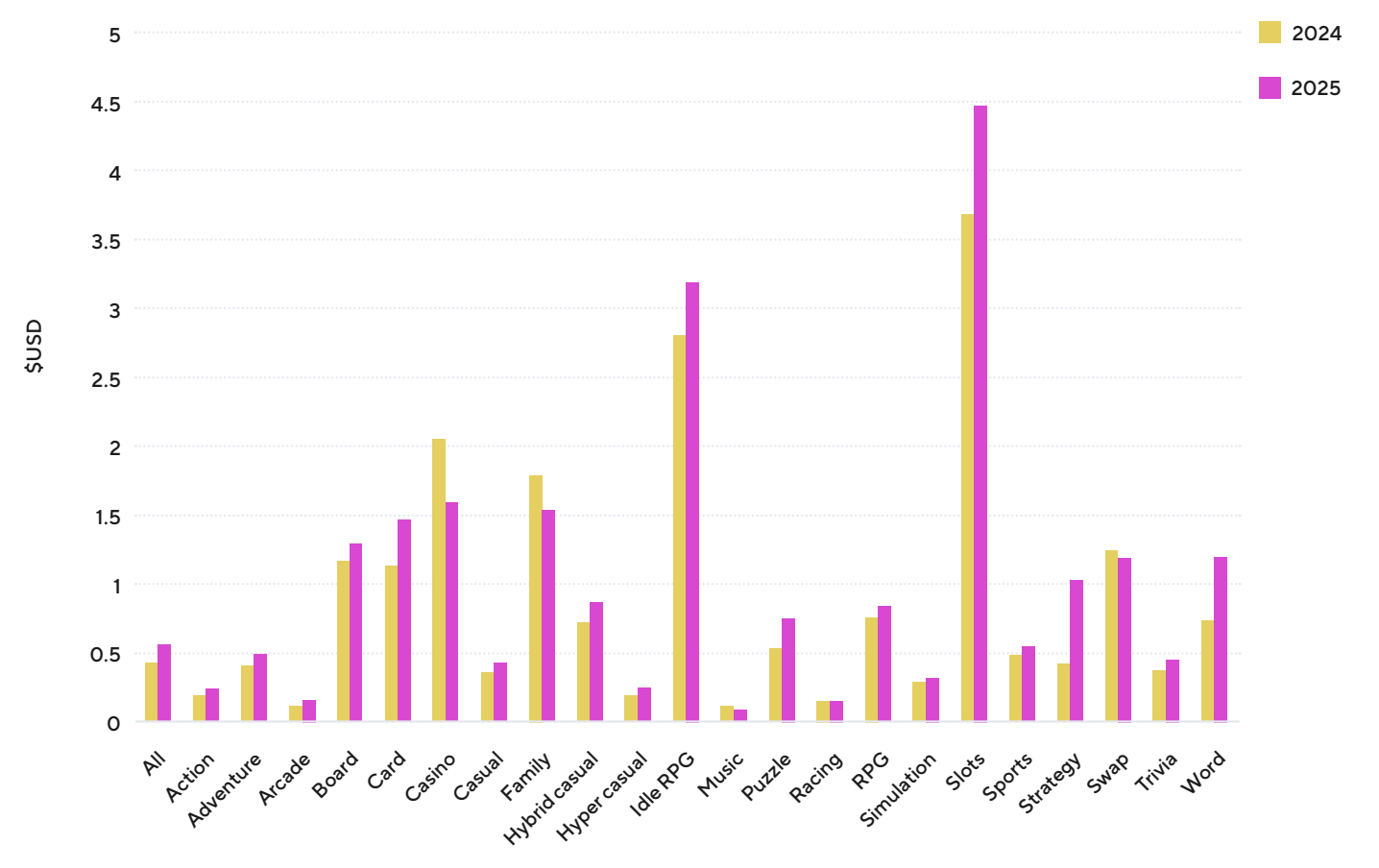
Gaming app cost per click (CPC) increased overall in 2025, rising from \$0.03 to \$0.04 (+33%) globally. Strategy saw the largest percentage increase, climbing from \$0.03 to \$0.07 (+133%). Slots more than doubled from \$0.17 to \$0.35 (+106%) and accounted for the highest CPC.

Card declined 11%, and swap recorded the largest decrease, from \$0.09 to \$0.06 (-33%).

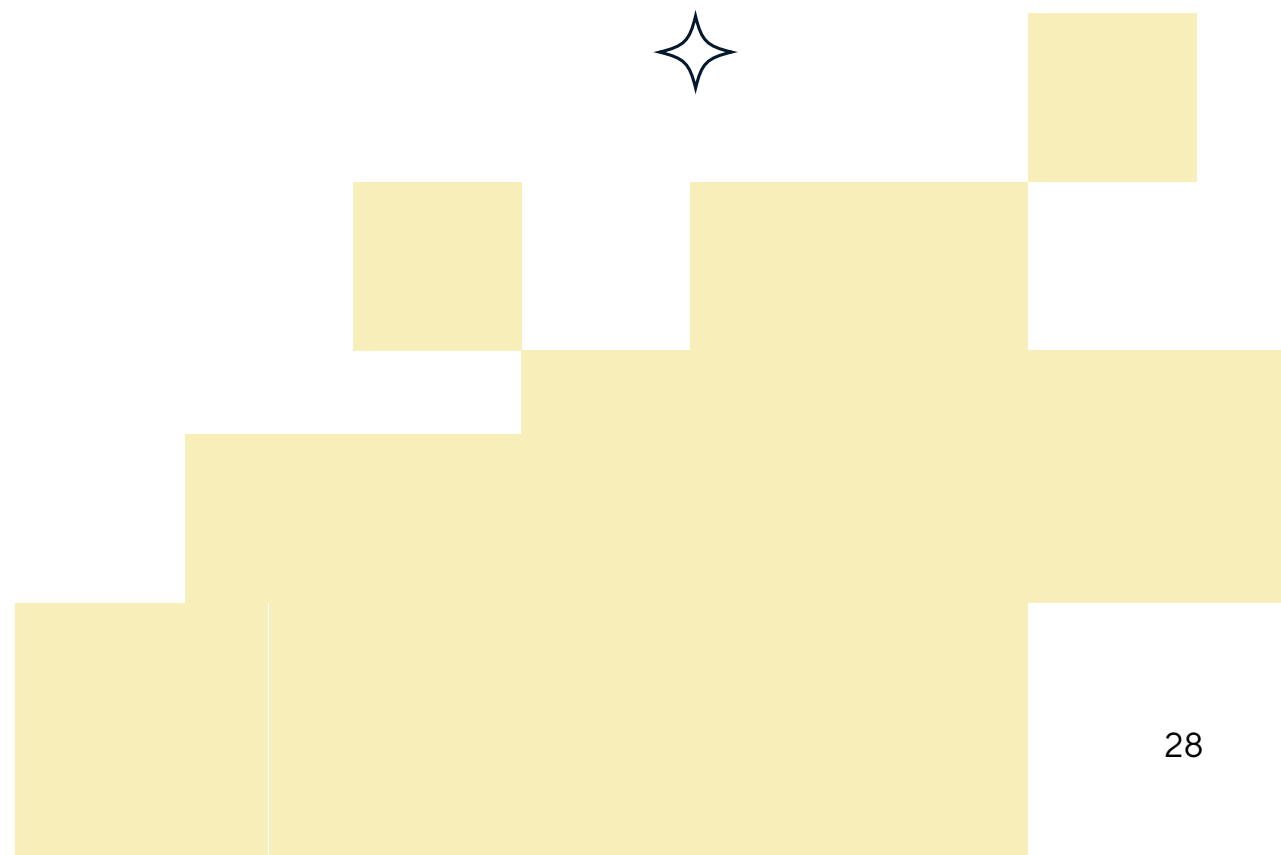
At the regional level, North America recorded the highest CPC and the biggest increase. The region rose from \$0.07 to \$0.12 (+71%), with the U.S. individually up from \$0.07 to \$0.13 (+86%). Europe also increased, moving from \$0.02 to \$0.03 (+50%).

In APAC, CPC remained flat overall at \$0.02, but several countries saw significant increases. LATAM and MENA remained stable at \$0.01 overall.

### Gaming app CPI 2024 - 2025 (Global)



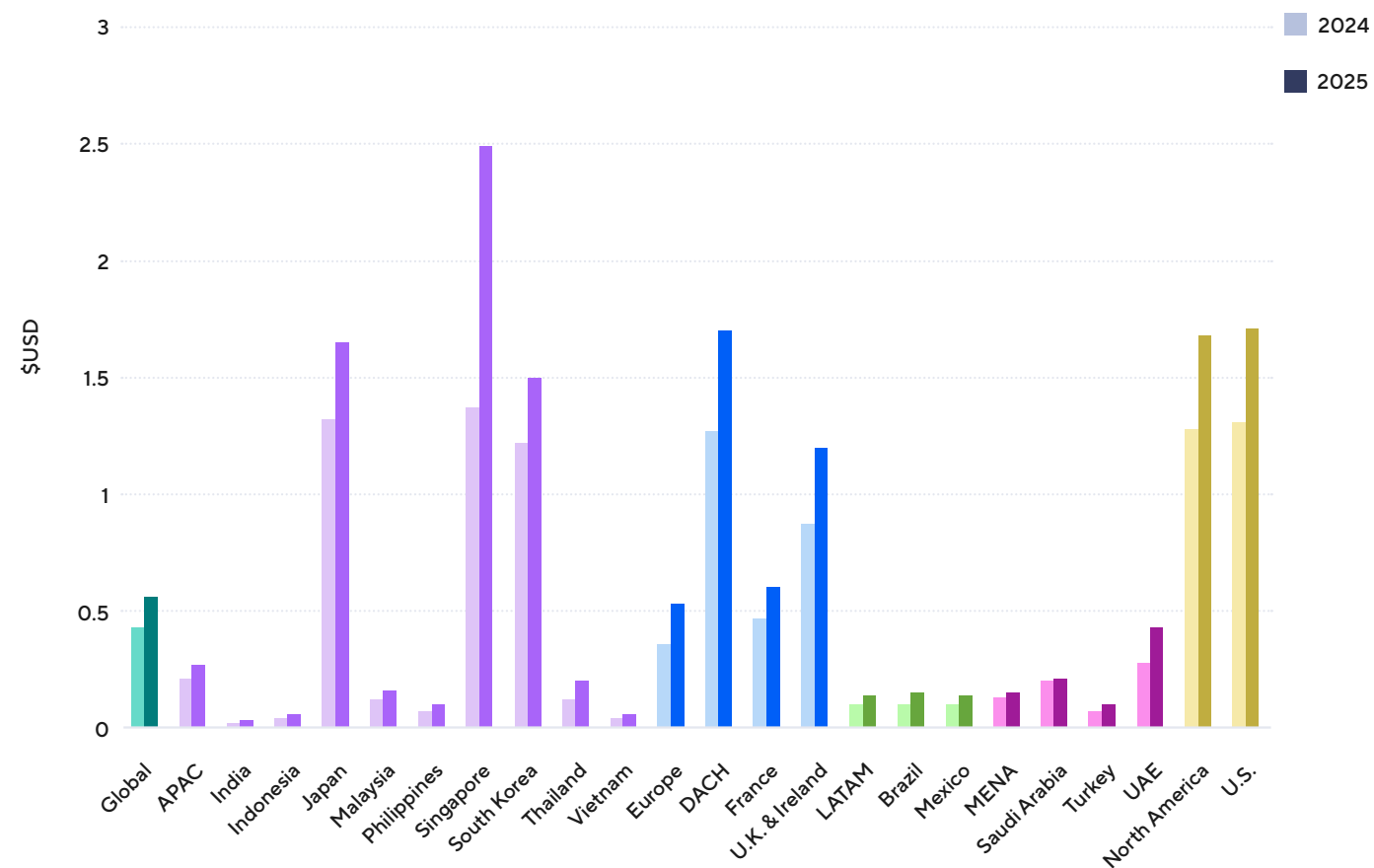
Global gaming cost per install (CPI) increased to \$0.56 in 2025, representing 30% YoY growth. The largest increases were recorded in slots, which hit \$4.47, idle RPG (\$3.19), and strategy (\$1.03). CPI, however, declined in the casino, family, and swap subverticals.



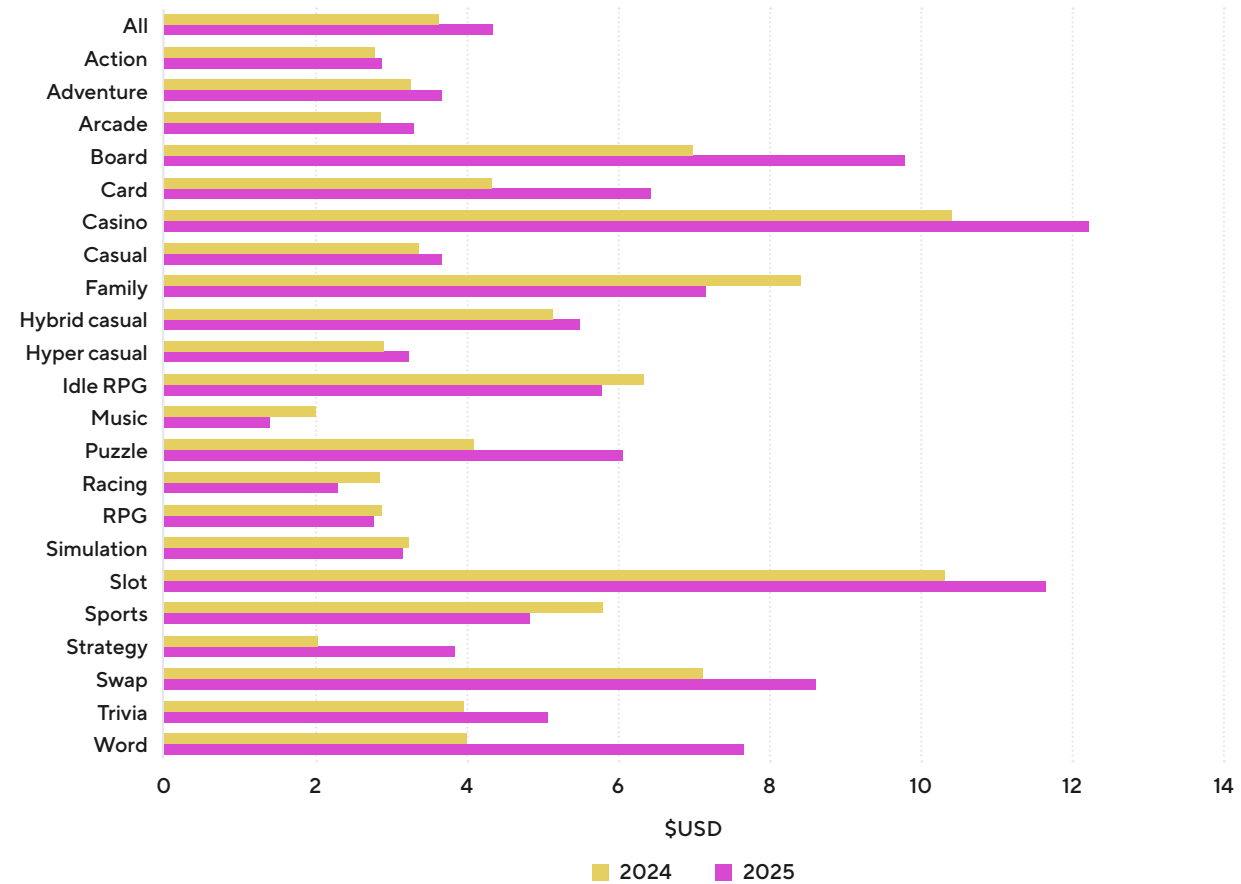
CPI in APAC rose 29%, increasing from \$0.21 to \$0.27. Within APAC, Singapore saw the largest jump, up 82% to \$2.49. Europe's CPI grew 47% overall (\$0.36 to \$0.53), and the DACH region increased by 34% (\$1.27 to \$1.70). LATAM grew 40% to \$0.14, while Brazil and Mexico individually grew by 50% and 40%.

MENA is up 15%, Turkey and the UAE by 43% and 54%, and Saudi Arabia by 5%. In North America, CPI went up 31%, from \$1.28 to \$1.68, with the U.S. increasing from \$1.31 to \$1.71.

**Gaming app CPI by region and country 2024 - 2025**



## Gaming app CPM 2024 - 2025 (Global)



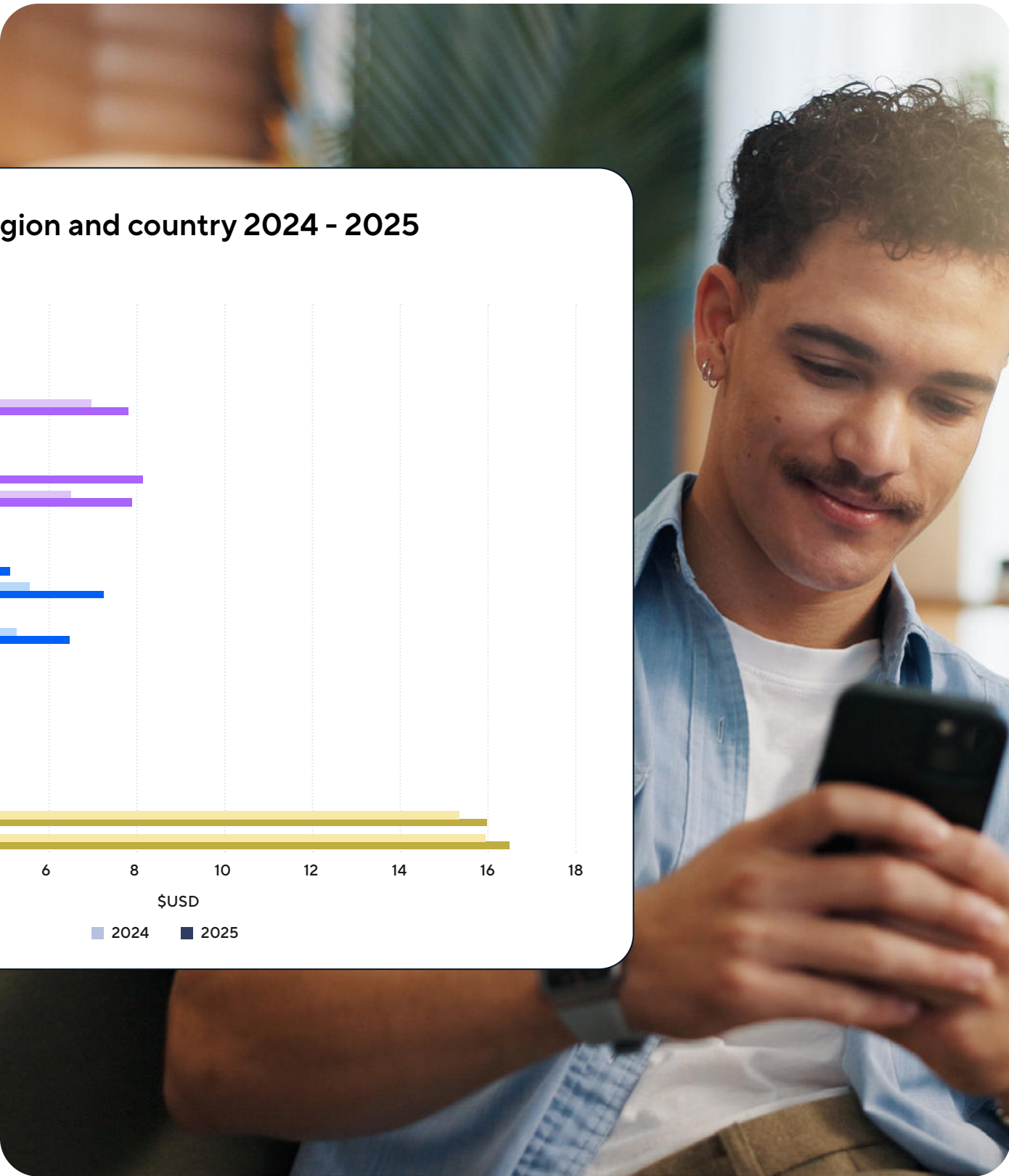
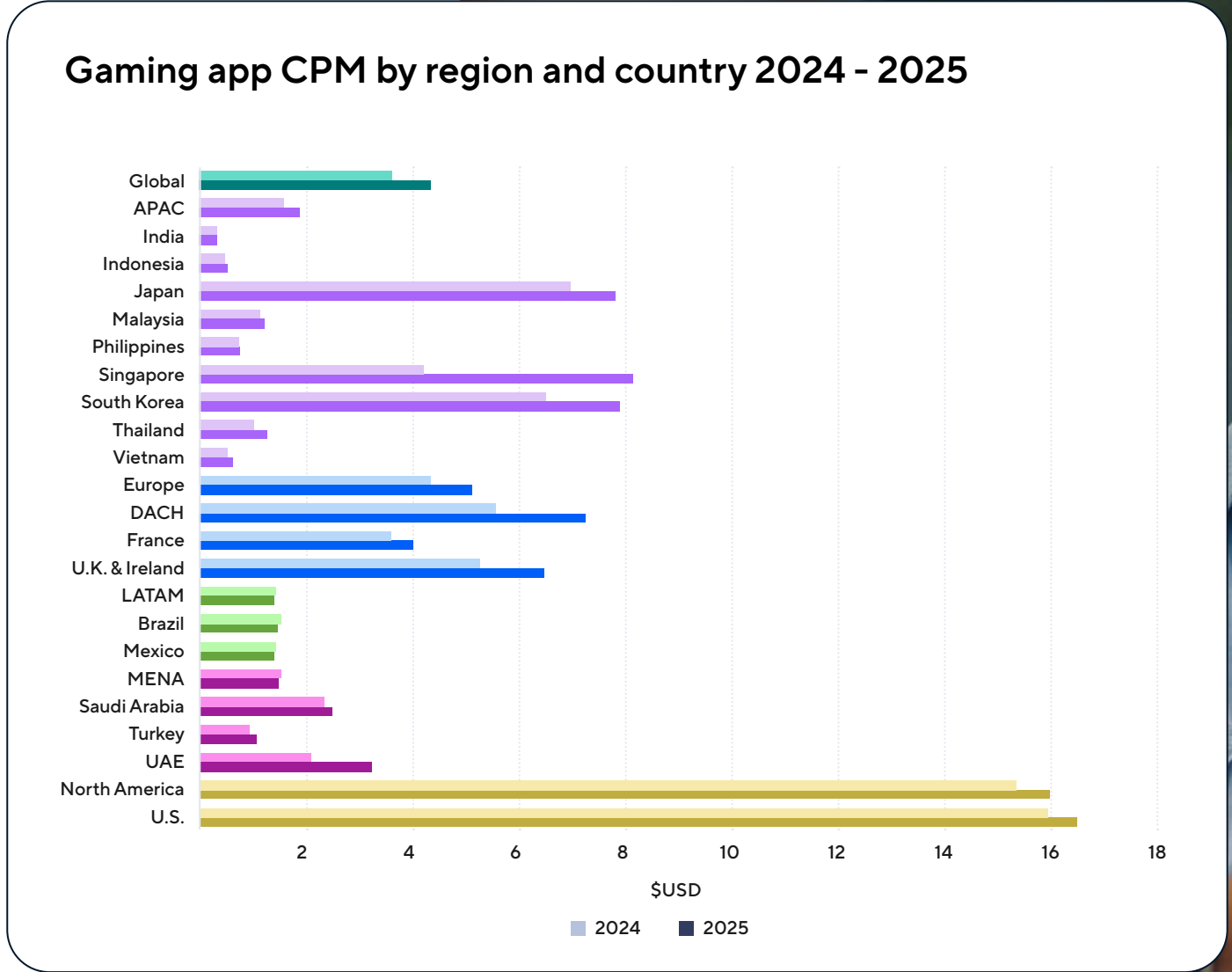
Global gaming cost per mille (CPM) increased from \$3.63 in 2024 to \$4.34 in 2025, a 20% YoY rise. However, some genres decreased. Music dropped 31% from \$2 to \$1.39, racing by 19% (\$2.85 to \$2.32), sports 17% (\$5.79 to \$4.83), and family 15% (\$8.41 to \$7.16). Idle RPG decreased 9% (\$6.33 to \$5.78), while RPG and simulation dropped 4% and 3%, respectively.

Casino increased 17% to \$12.22, and slots rose 13% to \$11.65, staying among the highest CPM categories overall.

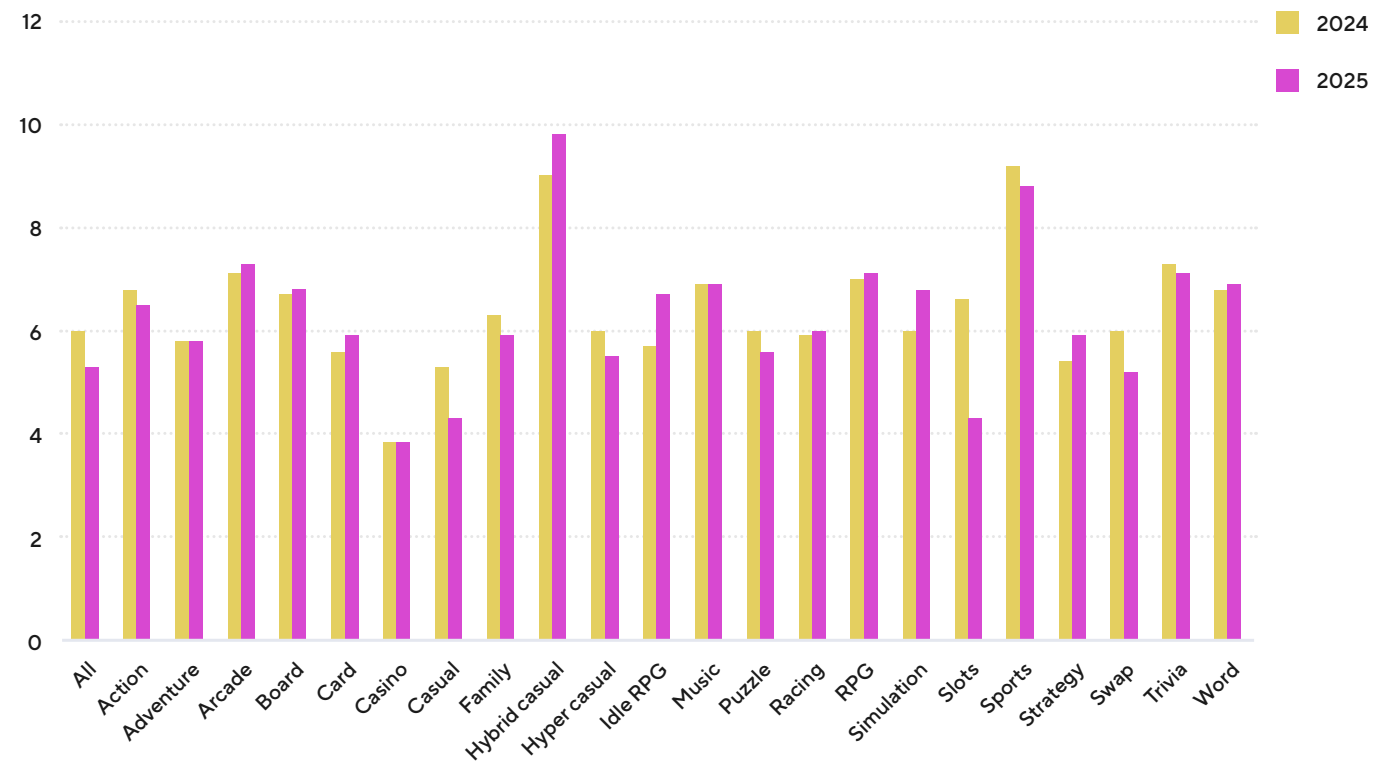
LATAM experienced a CPM decline from \$1.43 to \$1.41, with Brazil decreasing 3%. MENA dropped 3% overall (\$1.54 to \$1.49). UAE had the biggest increase in the region, climbing 55% to \$3.25.

North America stayed the highest-cost region, with CPM rising from \$15.35 to \$15.98, (+4% increase). Europe saw an 18% overall increase, rising from \$4.35 to \$5.12.

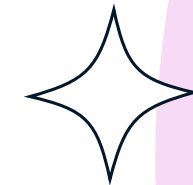
APAC increased by 19% (\$1.59 to \$1.89), with Singapore seeing the biggest jump (93% to \$8.15). India dropped by 3% (\$0.34 to \$0.33).



### Gaming partners per app 2024 - 2025 (Global)



In 2025, gaming apps partnered with an average of 5.3 networks, a drop from 6 in 2024. Hybrid casual, idle RPG, and simulation genres grew their partner networks to 9.8, 6.7, and 6.8, while casual, slots, hyper casual, and swap genres reduced to 4.3, 4.3, 5.5, and 5.2.



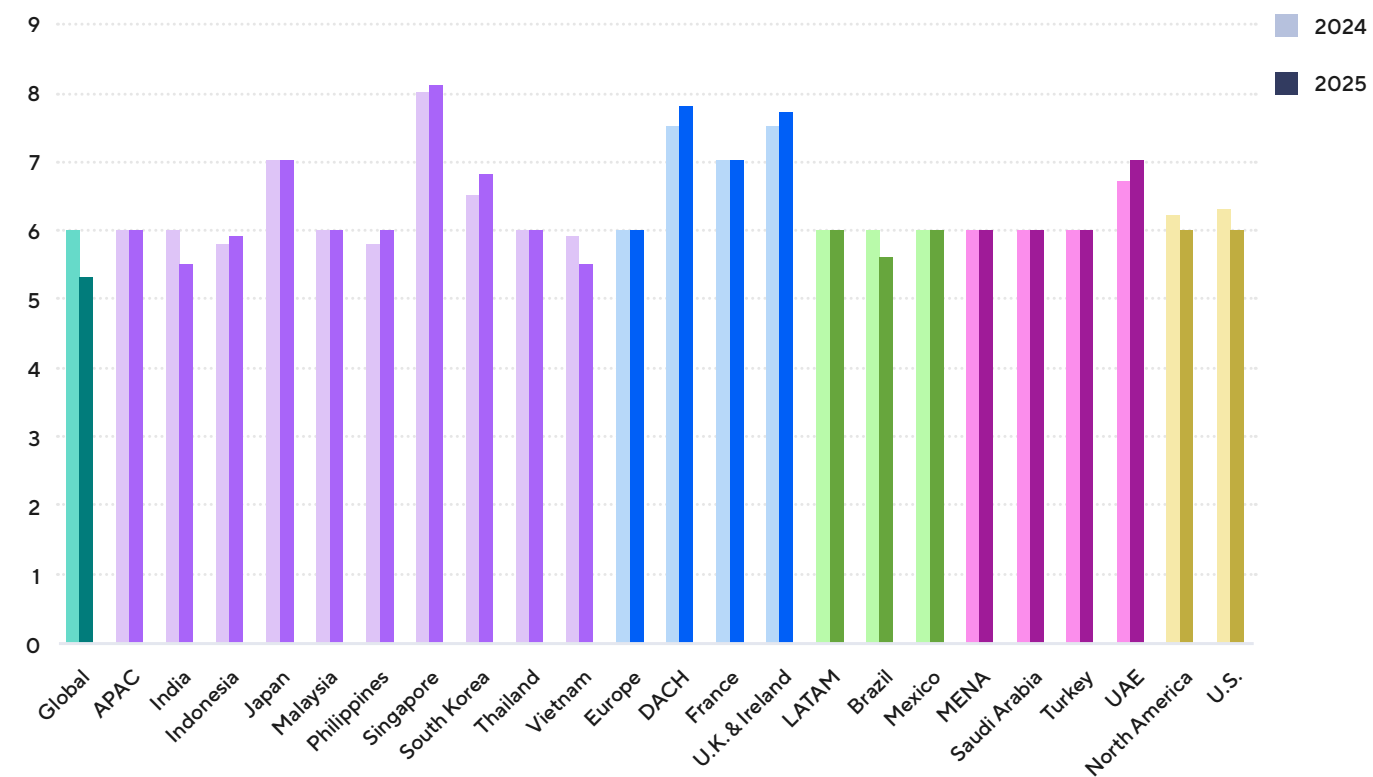
APAC averaged 6 partners per app in 2024 and 2025. Within the region, Singapore increased from 8 to 8.1, South Korea from 6.5 to 6.8, Indonesia from 5.8 to 5.9, and the Philippines from 5.8 to 6. Vietnam and India both decreased to 5.5.

Europe, LATAM, and MENA all remained stable at 6 overall, while DACH increased from 7.5 to 7.8, and the U.K. & Ireland climbed from 7.5 to 7.7. Brazil declined from 6 to 5.6, and the UAE increased from 6.7 to 7. North America and the U.S. both dropped to 6.



With user acquisition costs rising, teams are focusing a smaller share of channels that bring in users with the highest pLTV. Only once a channel is fully optimized does it make sense to expand the mix.

Gaming partners per app by region and country 2024 - 2025



## CONCLUSION

# Winning the next chapter of mobile gaming

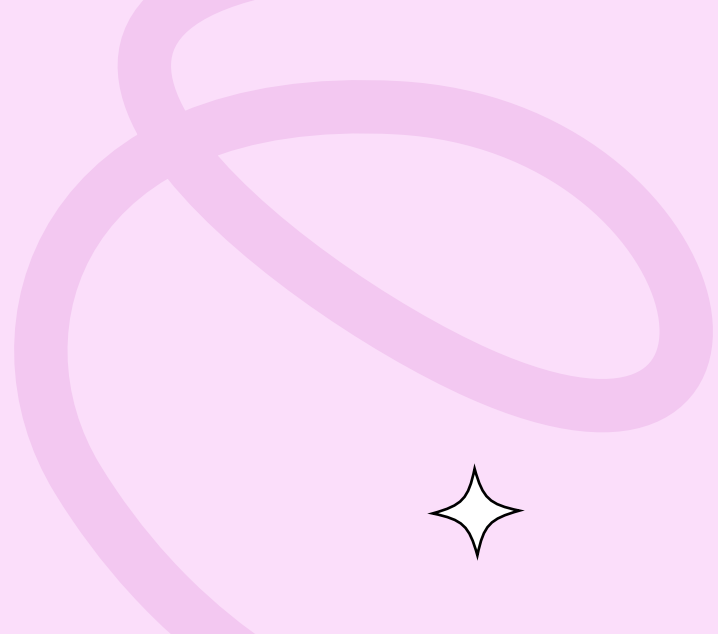
The future is bright for mobile gaming, but not without challenges. Acquiring new users is competitive and expensive, facilitating an increasing focus on everything that happens after an install, from streamlined onboarding to sustained user engagement and retention. Once a user is acquired, it's essential to keep them until ROI is met and exceeded. Games need to offer experiences that are valuable, from live ops and rewards to tie-ins and features that drive urgency and repeat sessions.

Part of the challenge is navigating an extremely busy space; reaching users with creatives that cut through the noise and speak to the right users at the right time. The ecosystem itself is also evolving, with paths to conversion spanning multiple channels and players interacting and gaming across multiple devices and platforms. Users are still gaming at stable and even growing rates, but expectations for top tier experiences are high, and have to be met.

Holistic, reliable, and actionable data has always been needed to navigate mobile growth and especially so to

move the needle in gaming UA, where margins can be incredibly slim. Now, with more data than ever available, but fragmented inputs and growing costs, accurate measurement and a truly reliable data source is make-or-break. Advertisers need clarity on where users originate, which channels are delivering high-value, ROI-positive installs, and which sources provide users that remain engaged long term. With the right data, you know how investments translate into long-term value and can determine exactly which steps to take next for immediate campaign optimization as well as future strategic planning.

With Adjust's attribution and measurement, mobile gaming studios can consolidate acquisition, engagement, and spend + revenue data into a single platform. Thanks to our AI-powered Growth Copilot, you can easily query data in a natural language interface, and with deep linking, you can create experiences that seamlessly guide users to the right destinations. Marketers can then spot high-value player segments sooner, test creatives faster, and allocate budgets with confidence rather than guesswork.



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