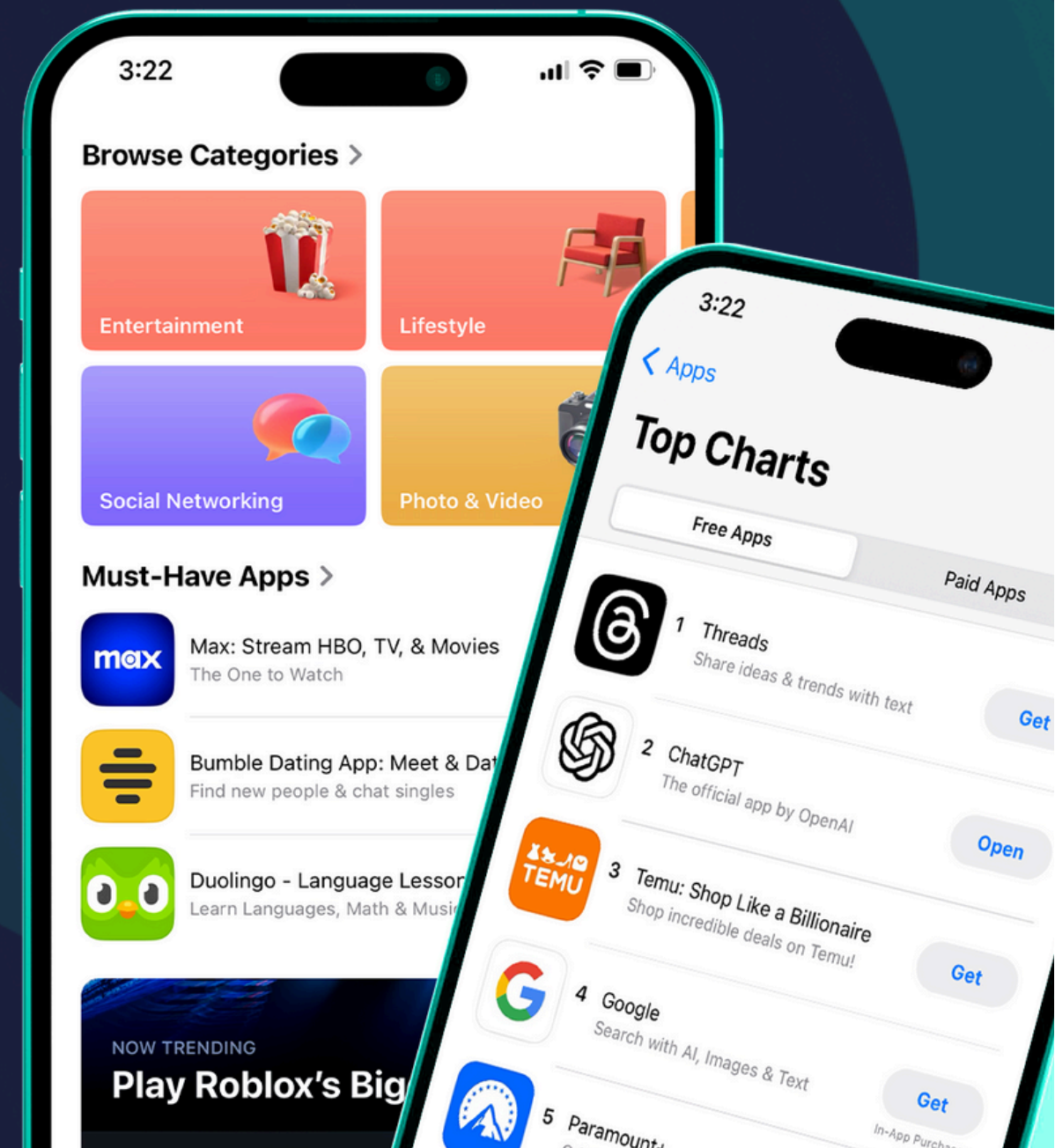


State of Mobile 2025

The industry's leading report



Executive Summary | Key Takeaways

01

AI is everywhere on mobile.

AI apps continued to soar in 2024, and use cases spread across verticals, from productivity to finance.



02

Consumer spend in non-games soars.

Revenue growth accelerated to +25% year-over-year (YoY). Consumers are willing to pay for services across categories.



03

Connecting mobile to in-person amid digital fatigue

Many of the fastest growing categories connect users across devices or to their in-person experiences.



04

Mobile gaming bounces back.

Gaming in-app purchase revenue climbed 4% YoY as Strategy, Puzzle, and Action fuel growth.



05

Going global: competition spans across regions.

Retail is an example area of global competition with Chinese-backed Temu and SHEIN entering the space.



06

Crypto apps are booming again.

Improving macroeconomic conditions and higher Bitcoin prices helped fuel a resurgence in crypto apps.





Executive Summary | Mobile Landscape at a Glance

New App Downloads

136
Billion

-1.0%

YoY Growth

iOS & Google Play

258,000 apps
downloaded per minute
in 2024



In-App Purchase (IAP) Revenue

\$150
Billion

+12.5%

YoY Growth

iOS & Google Play.
Revenue is gross, inclusive of any
percent taken by the app stores.

\$285,000 spent
per minute in 2024



Total Hours Spent

4.2
Trillion

+5.8%

YoY Growth

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

>500 hours on average
for every person on Earth
in 2024



Average Time Spent per User

3.5
Hours per Day

+2.9%

YoY Growth

iOS & Android Across 60+
Markets (Excludes China)

>13 minutes
per waking hour



of Apps Used per User

26
Per Month

+9.2%

YoY Growth

iOS & Android Across 60+
Markets (Excludes China)

7 unique apps
used each day per user
on average



Contents

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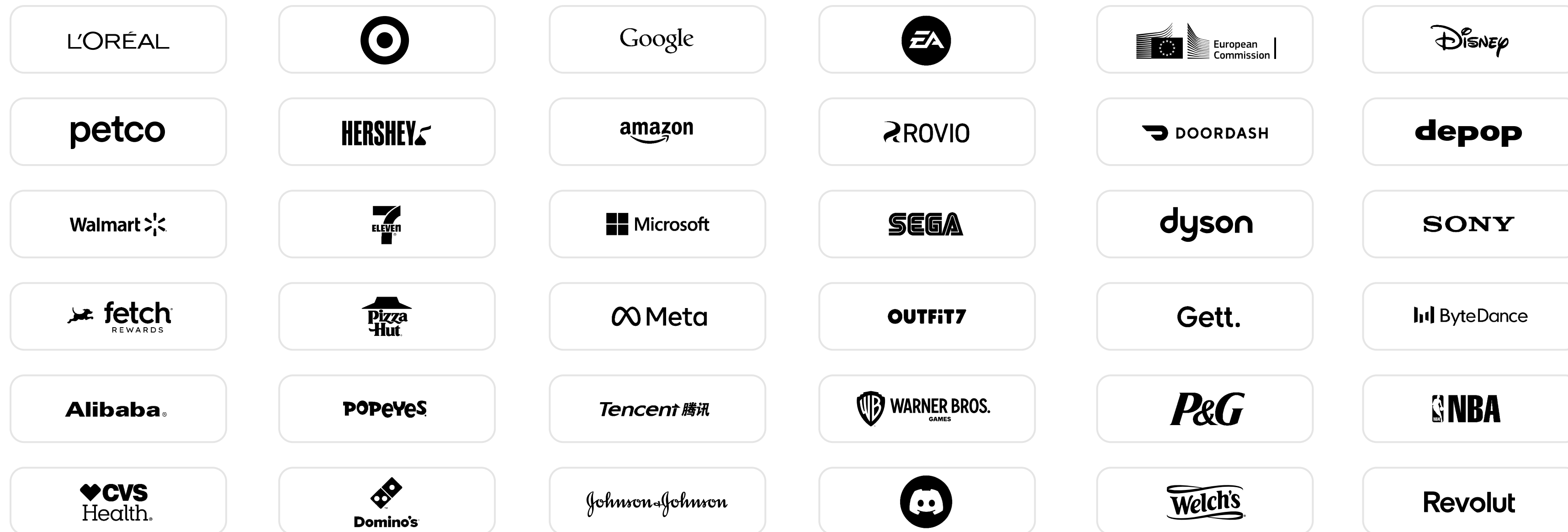
Top Apps and Games

Page 86 →



Sensor Tower | Our Customers

Top publishers trust Sensor Tower insights to grow their business.



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



Next level insights.

**data.ai is now part
of Sensor Tower**

About this data:

Methodology

- Sensor Tower's Insights team compiled the download and IAP revenue estimates provided in this report using the Sensor Tower Mobile App Insights platform.
- Figures cited in this report reflect iOS App Store and Google Play download and revenue estimates for January 1, 2014 through December 31, 2024.
- Download estimates presented are on a per-user basis, meaning that only one download per Apple or Google account is counted towards the total.
- Downloads of the same app by the same user to multiple devices, updates, or re-installs of the same app by the same user are not counted towards the total.
- 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.
- In-app purchase (IAP) revenue estimates are gross — inclusive of any percent taken by the app stores. 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.

[View Detailed Report Methodology Here.](#)





Interested in our Digital Market Insights Solutions?

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

Request a free demo!

A red arrow pointing from the right towards the 'Request a free demo!' button.

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

01

Macro Mobile Trends

A maturing mobile market. Growth in time spent on mobile devices is slowing, while revenue continues to soar, particularly in non-games. Apps have consumers' attention — now they are monetizing it.



At Scopely, we are driven by a culture of iteration and innovation - known as a 'Learning Machine' - that empowers us to constantly analyze data, apply insights across our portfolio, and quickly pivot where needed. Sensor Tower plays a key role in fueling our 'learning machine' by helping us deeply understand the market and stay ahead of the curve in such a rapidly changing industry.



Jessica Zestar-Postrk
SVP Strategy & Business Operations
Scopely



IAP Revenue Soars in Most Markets as Europe Sees Rapid Growth

In 2024, revenue from in-app purchases (IAP) and subscriptions continued its rapid growth, up 13% year-over-year (YoY) globally to \$150 billion. This included particularly strong growth in top markets in North America and Europe — the United States led the way with \$52 billion in consumer spend. With game revenue growth lagging that from non-games, some gaming-focused markets in Asia experienced more modest growth or even slight declines YoY.

What has helped create this revenue boom on mobile? Consumers are spending more time than ever on their mobile devices and are becoming increasingly comfortable making purchases on them. Time spent climbed in most markets, though it has leveled out in a few like the US and Japan.

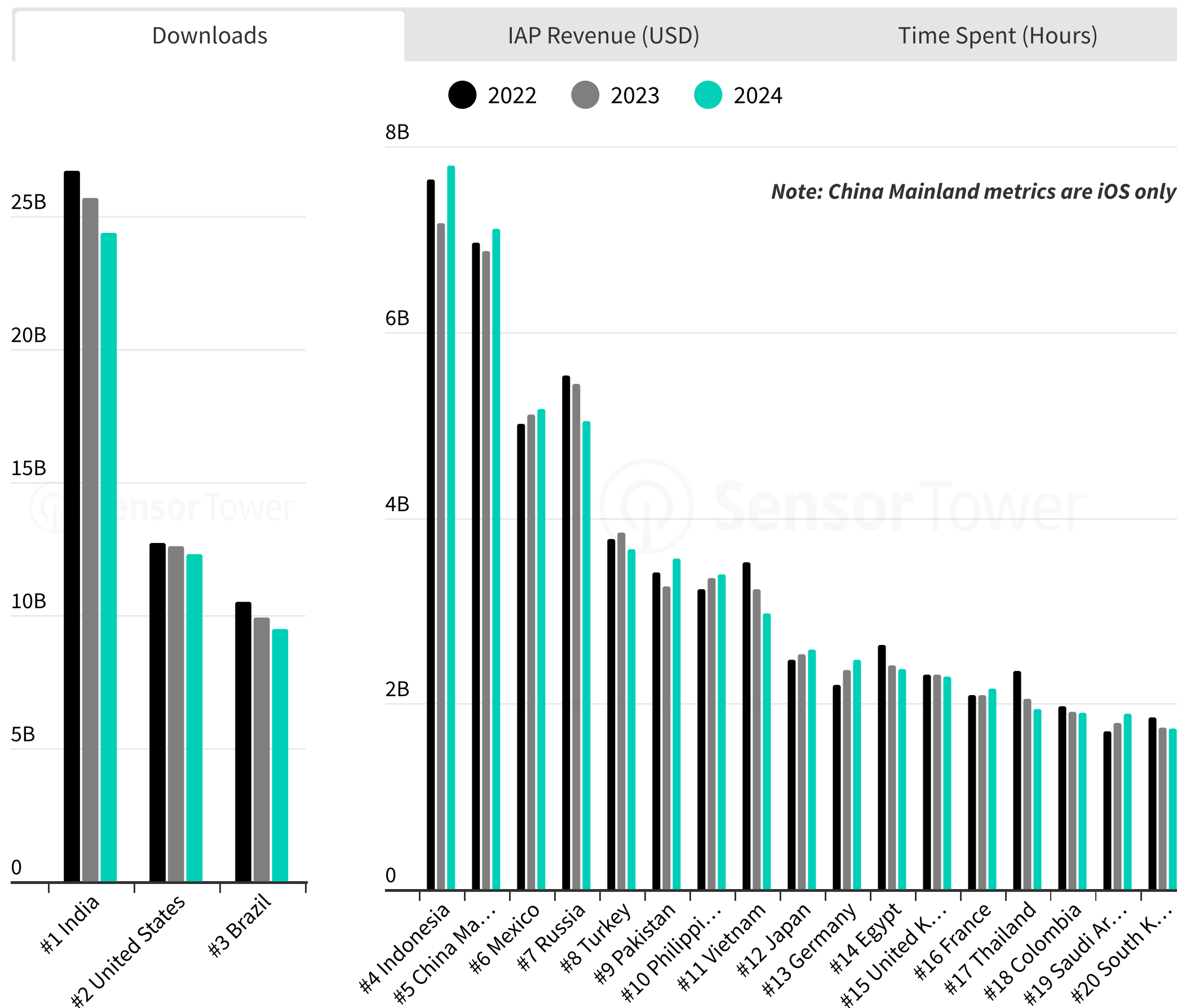
Meanwhile, downloads declined for the fourth straight year following the spike in 2020 during the COVID-19 pandemic. Half of the top 10 markets still achieved positive YoY growth, including Indonesia, China Mainland, and Mexico.

Want to See the Latest App Trends in Your Market?

[Request a demo](#) to see Sensor Tower's latest offerings covering 90+ different countries.

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

Top 20 Mobile Markets in 2024



Will Consumers Soon Spend More in Apps Than Games?

IAP revenue on mobile outside of mobile gaming has skyrocketed during the past 10 years, climbing from \$3.5 billion in 2014 to more than \$69 billion in 2024. And this growth is only accelerating — apps gained nearly \$14 billion in additional IAP revenue in 2024 alone (+25% YoY), well above the nearly \$9 billion added in 2023. Games still accounted for the bulk of mobile spend with more than \$80 billion in 2024, but YoY growth lagged at around 4%.

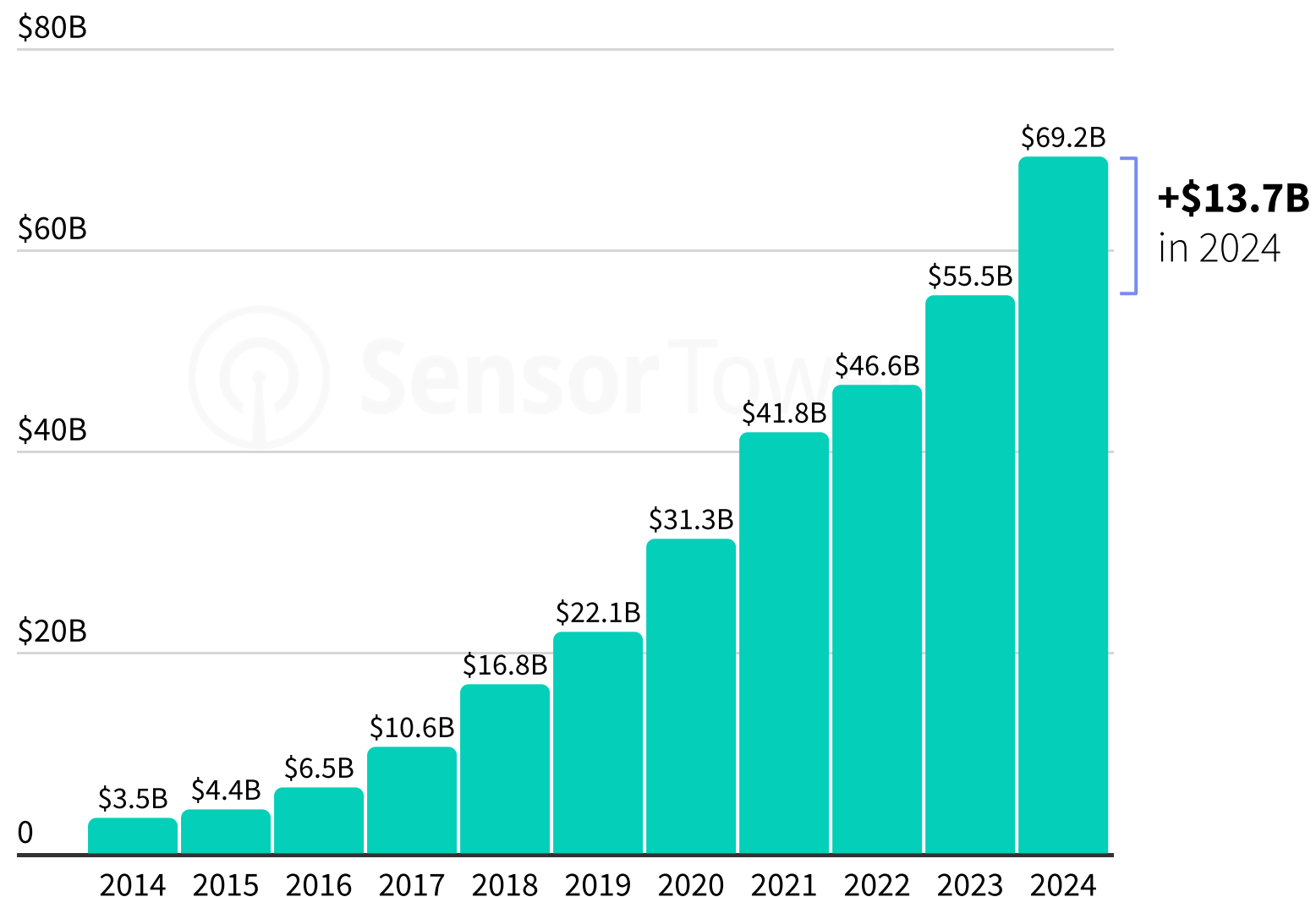
What's driving the growth? Entertainment, Productivity, and Photo & Video led the way in 2024 as every single category grew YoY.

Don't Want to Wait for the Next Year's Report?

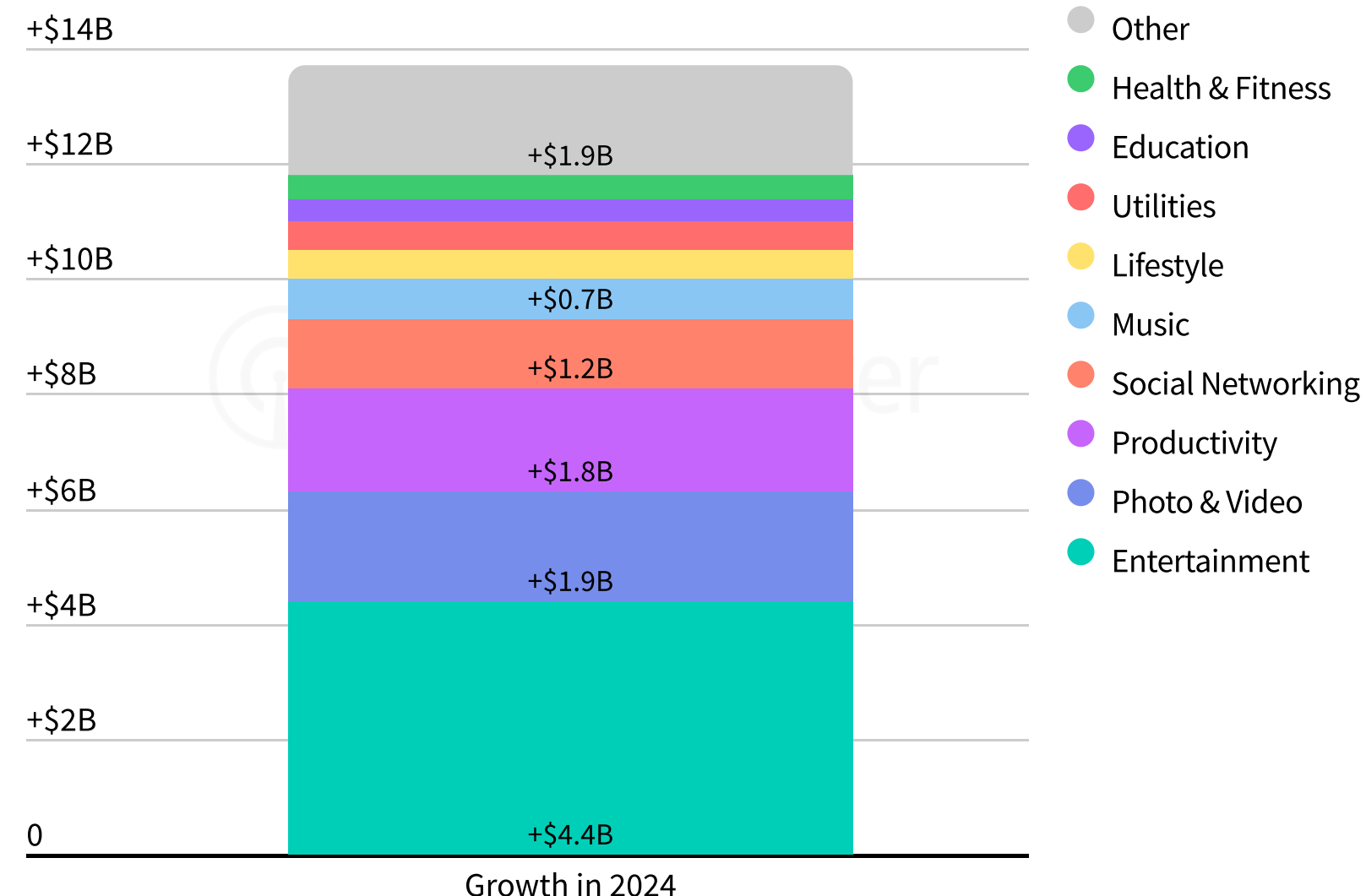
Look out for [Sensor Tower's Digital Market Index report](#) published every quarter, covering the latest trends across mobile, digital advertising, and retail media.

Source: Sensor Tower
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
Excluding Mobile Games, 2014 - 2024



Worldwide IAP Revenue Growth by App Category
2024 vs. 2023



Core App Categories Achieve Positive Download Growth in 2024

Even in 2024, some of the biggest app subgenres still provide stable sources of new downloads for mobile app publishers. Social Media (including apps like [Instagram](#) and [TikTok](#)), Film & Television Streaming (including [Netflix](#) and [Disney+](#)), and General Shopping (including [Temu](#) and [Amazon Shopping](#)) had modest positive YoY growth globally in 2024. A few Financial Services subgenres also achieved positive growth, with Digital Wallet & P2P Payment app downloads climbing 10% and Consumer Banking app downloads up 2% YoY.

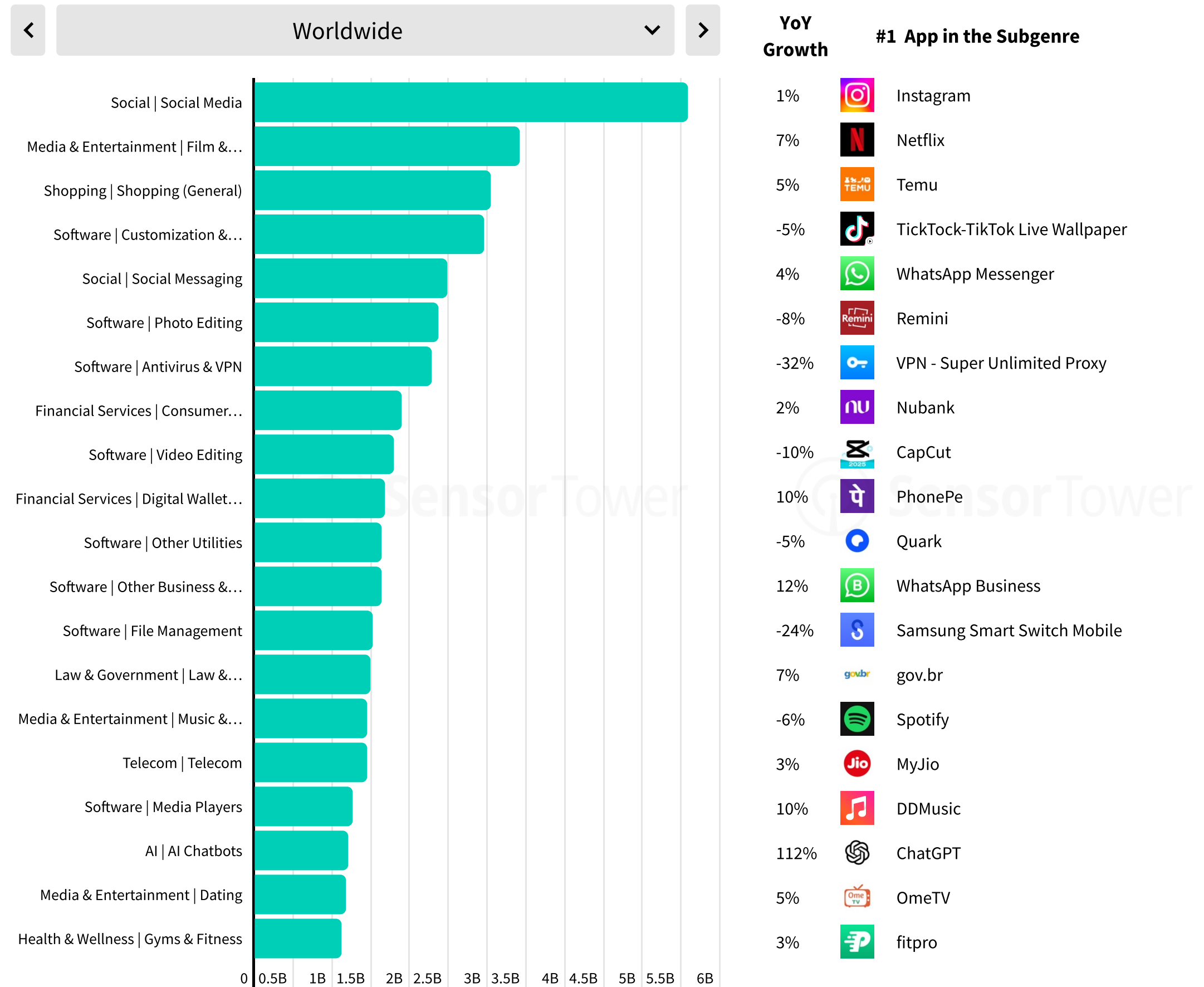
In contrast, several Software genres saw notable declines, including Antivirus & VPN (-32% YoY) and File Management (-24%). A large portion of this drop off in downloads can be explained by the market correcting following years of rapid download growth, particularly in a few of the largest markets like India and Brazil.

Dive Deeper with Sensor Tower's Top Apps

Identify the top performing apps across any country and any app store category. Or, try Sensor Tower's detailed app taxonomy, including more than 180 different classifications for non-game apps. [Sensor Tower customers can try the link here.](#)

Source: Sensor Tower
 Note: iOS and Google Play combined. iOS only for China. Apps classified using Sensor Tower's taxonomy as of January 5, 2025.

Top 20 Global App Subgenres by Downloads in 2024



Streaming and Social Media Lead Revenue in Non-Games as AI Chatbots Surge

Film & Television Streaming and Social Media were the top two subgenres by IAP revenue in 2024 by a wide margin, and both saw rapid growth across the globe. However, the two have taken different paths to becoming the leading subgenres on mobile. Streaming apps tend to monetize through subscriptions, and the space remains very competitive with nine different apps accounting for at least 3% of the overall streaming revenue (and none above 15%). Social Media, on the other hand, is dominated by TikTok and YouTube, which alone take more than 70% of the subgenre's consumer spend. TikTok in particular has revolutionized non-game monetization, offering in-app purchases that allow users to tip creators or promote their content.

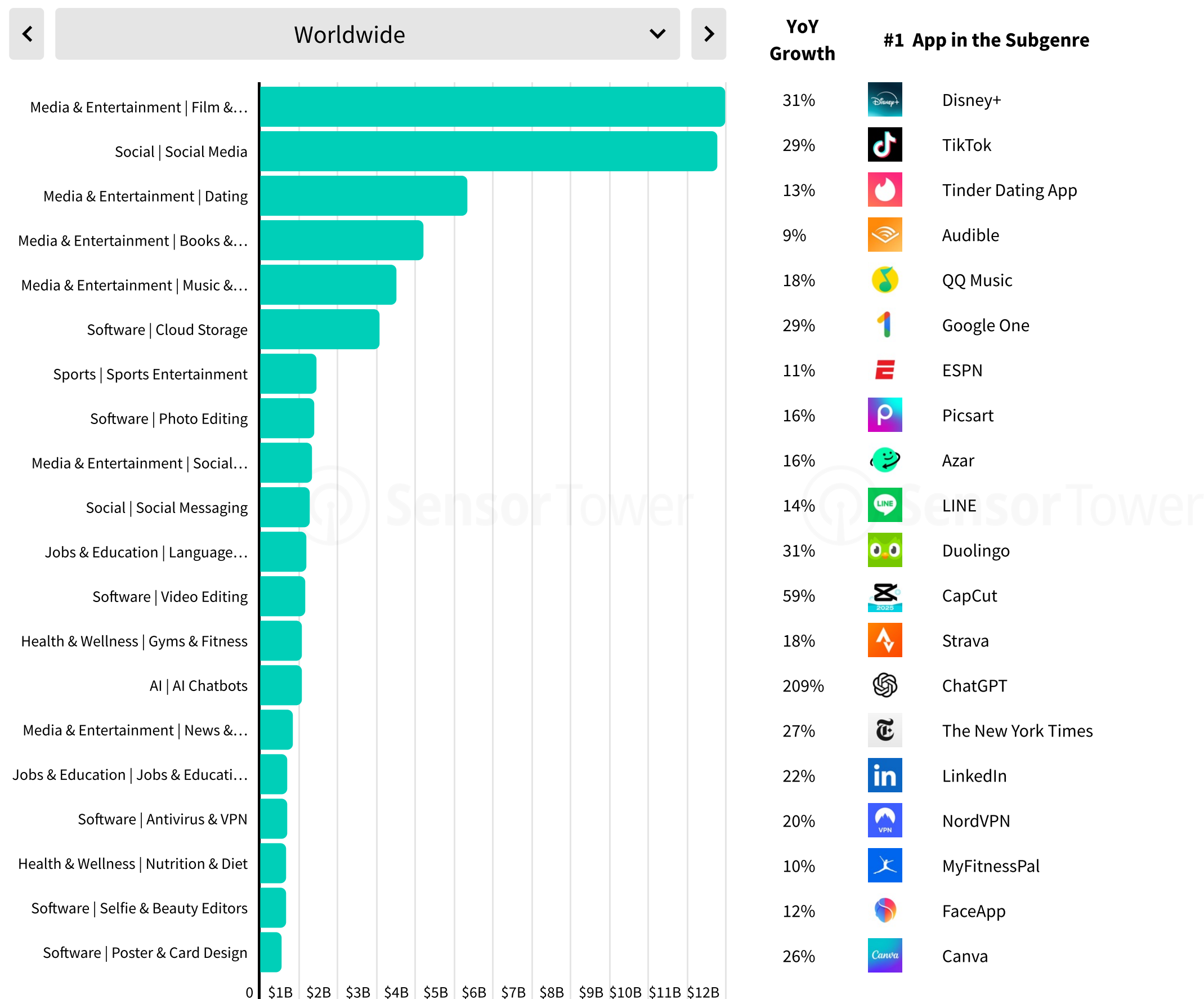
Mobile has also risen the wave of AI enthusiasm into 2024. AI Chatbot apps like ChatGPT was the fastest growing app subgenre with more than 200% growth YoY, and the at this rate the subgenre could easily rank among the top 10 by global consumer spend a year from now.

TikTok's Record-Breaking Ascent

[Check out our blog post](#) studying how TikTok became the first non-game to reach \$15 billion in global consumer spend and how it stacks up all-time.

Source: Sensor Tower
 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 5, 2025.

Top 20 Global App Subgenres by IAP Revenue in 2024



Consumers Spent Nearly 2.4 Trillion Hours on Social Media Apps in 2024 – or 6.6 Billion Hours Each Day

Mobile users spent nearly 2.4 trillion hours on Social Media apps in 2024 across iOS and Android devices, up 6% YoY. This was equivalent to 6.6 billion hours per day, or roughly an average of 50 minutes for every person on Earth. Messaging apps were a distant second at 607 billion hours, followed by Browsers at 330 billion hours.

Time spent growth in AI Chatbot apps even outpaced the downloads, with more than 300% YoY growth. Consumers spent more than 7 billion hours in apps like Character AI and ChatGPT.

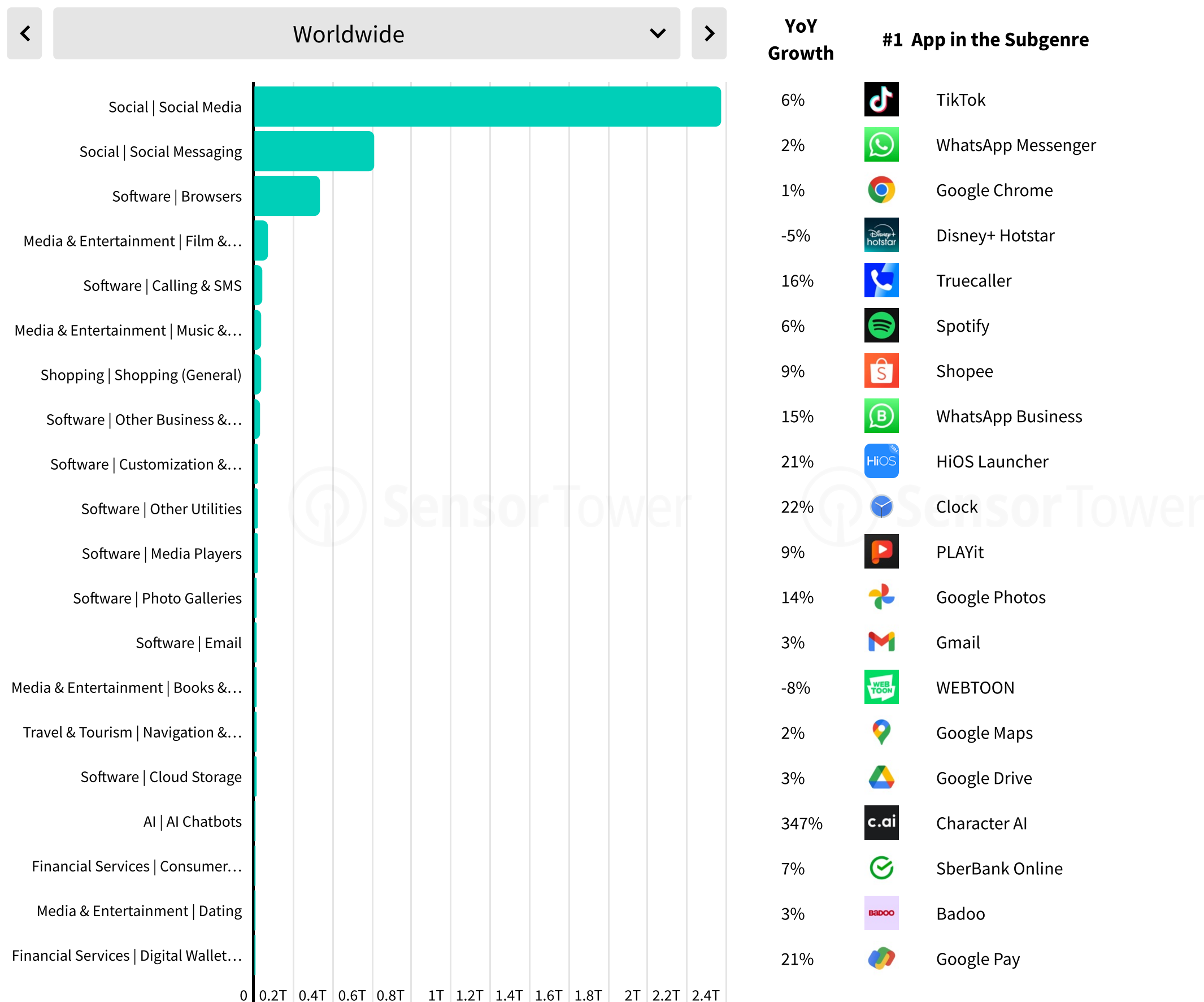
Another fast growing subgenre was Digital Wallets & P2P Payments, which saw time spent climb 21% YoY. This included strong growth across many APAC and Latin America markets such as India, Indonesia, South Korea, and Argentina.

Unlock Sensor Tower's App Usage Metrics

Sensor Tower's usage metrics let you dive deep into in-app usage behavior. Based on the world's largest proprietary mobile app panel, benchmark time spent, sessions, active users, and more. [Check it out here.](#)

Source: Sensor Tower
 Note: iOS and Google Play combined. iOS only for China. Apps classified using Sensor Tower's taxonomy as of January 5, 2025.

Top 20 Global App Subgenres by Total Time Spent (Hours) in 2024



AI Chatbots is the Breakout Subgenre for Downloads in 2024

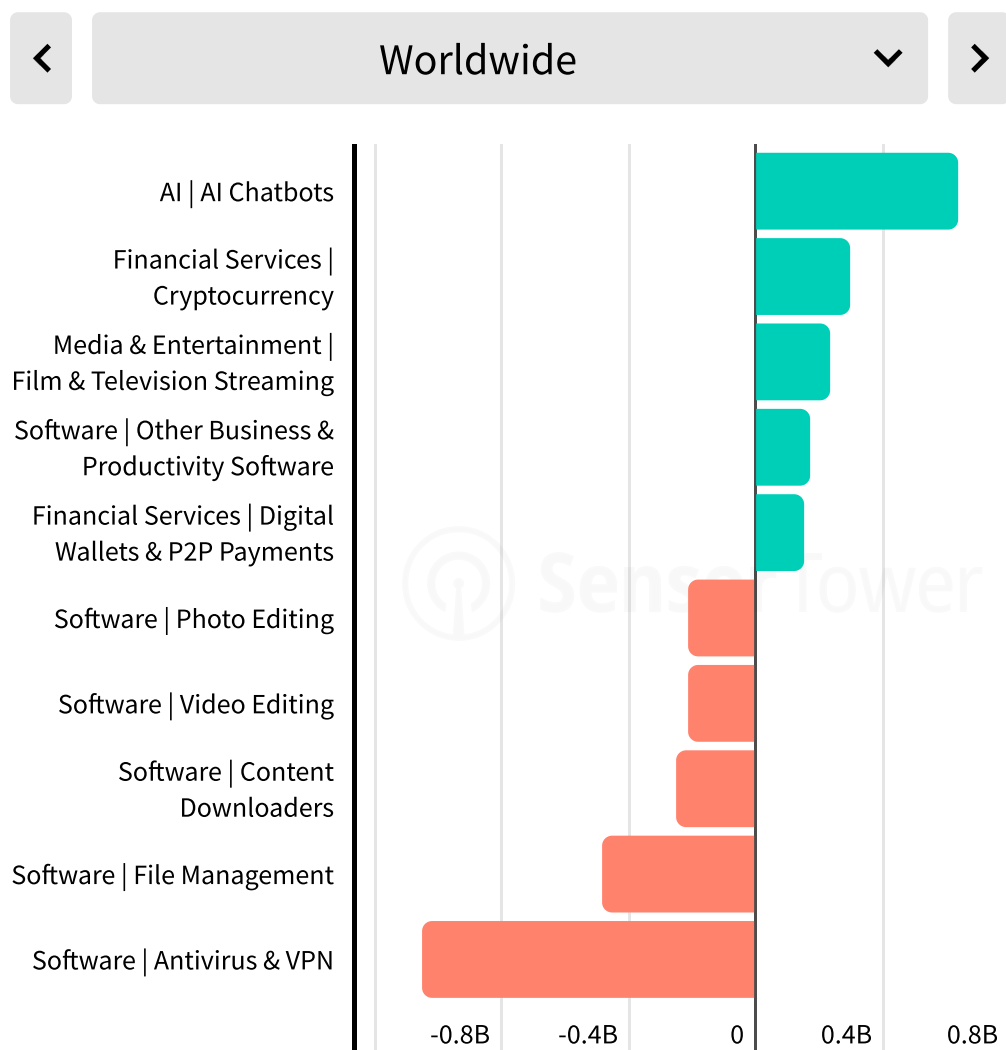
No subgenre built their user base more than AI Chatbots, which added 635 million more downloads in 2024 compared to 2023. The category was clearly appealing to users after download as well, with huge gains in time spent and IAP revenue. AI Chatbots ranked as the #3 subgenre by YoY revenue growth and time spent growth. Scroll through the different markets to see where AI Chatbots are gaining traction the fastest and which markets may still provide opportunities for growth.

Introducing AppIQ: App Classification Made Simple

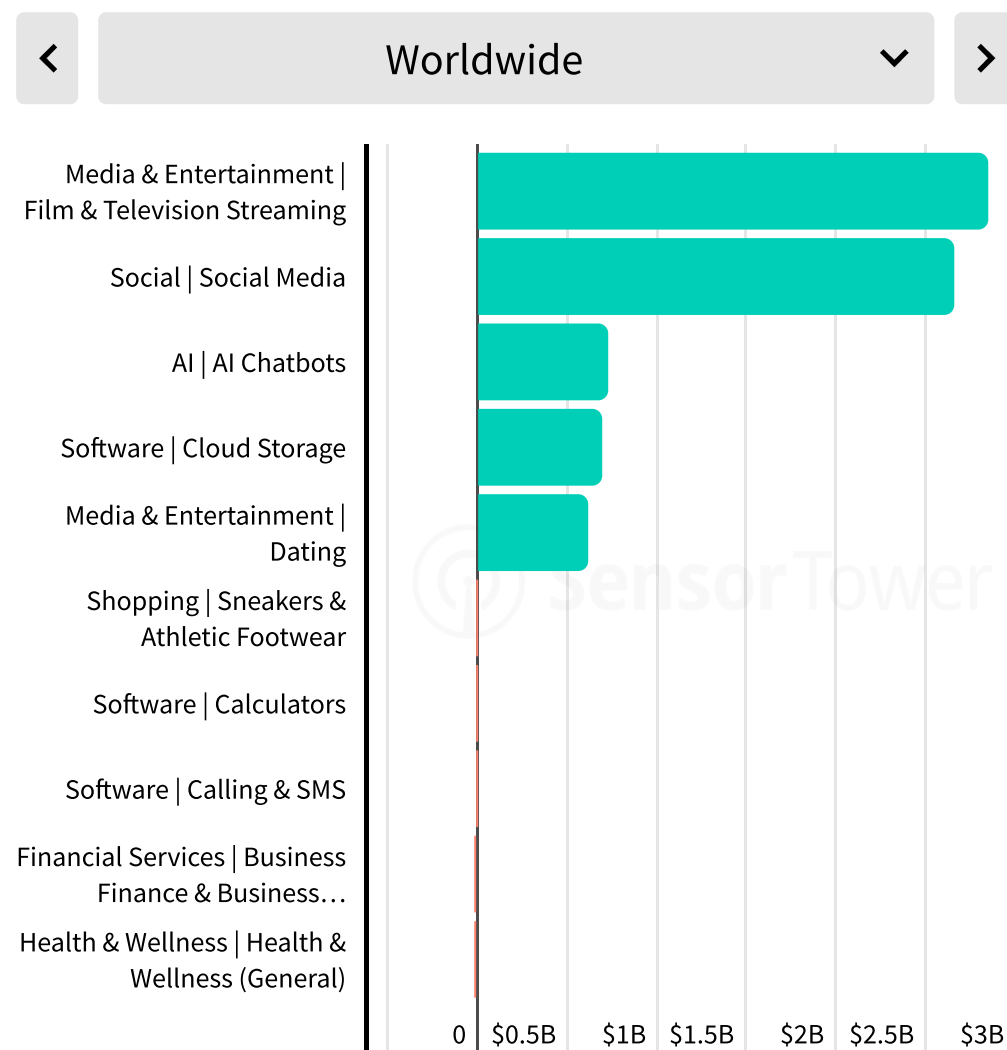
Coming Q1 2025, AppIQ by Sensor Tower will combine the best of both Sensor Tower's taxonomy and data.ai's App IQ. *Note: This report is based on Sensor Tower's taxonomy only.*

Source: Sensor Tower
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 5, 2025.

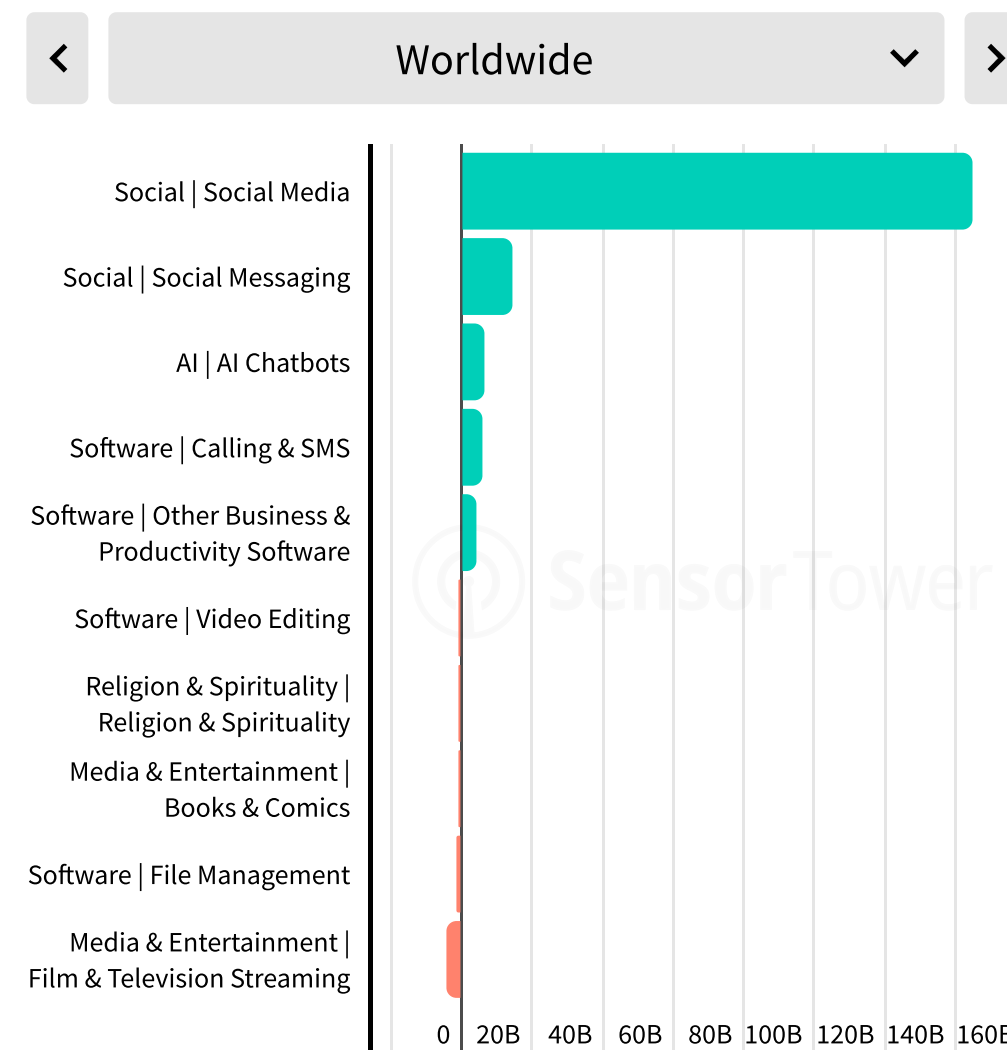
Downloads
App Growth 2024 YoY



IAP Revenue
App Growth 2024 YoY



Time Spent (Hours)
App Growth 2024 YoY



Four Games Joined the Billion Dollar Club in 2024

Last War, Whiteout Survival, Dungeon & Fighter, and Brawl Stars were the latest games to reach the billion dollar club — that is, surpassing \$1 billion in global gross IAP revenue for a calendar year. This was the most apps to reach the milestone for the first time since 2021 and reflects how the mobile games market is beginning to bounce back.

Interestingly, while the non-game market continues to flourish, only one non-game app surpassed \$1 billion for the first time in a year: WeTV. Another streaming service may hit the milestone next year — Max fell just short in 2024.

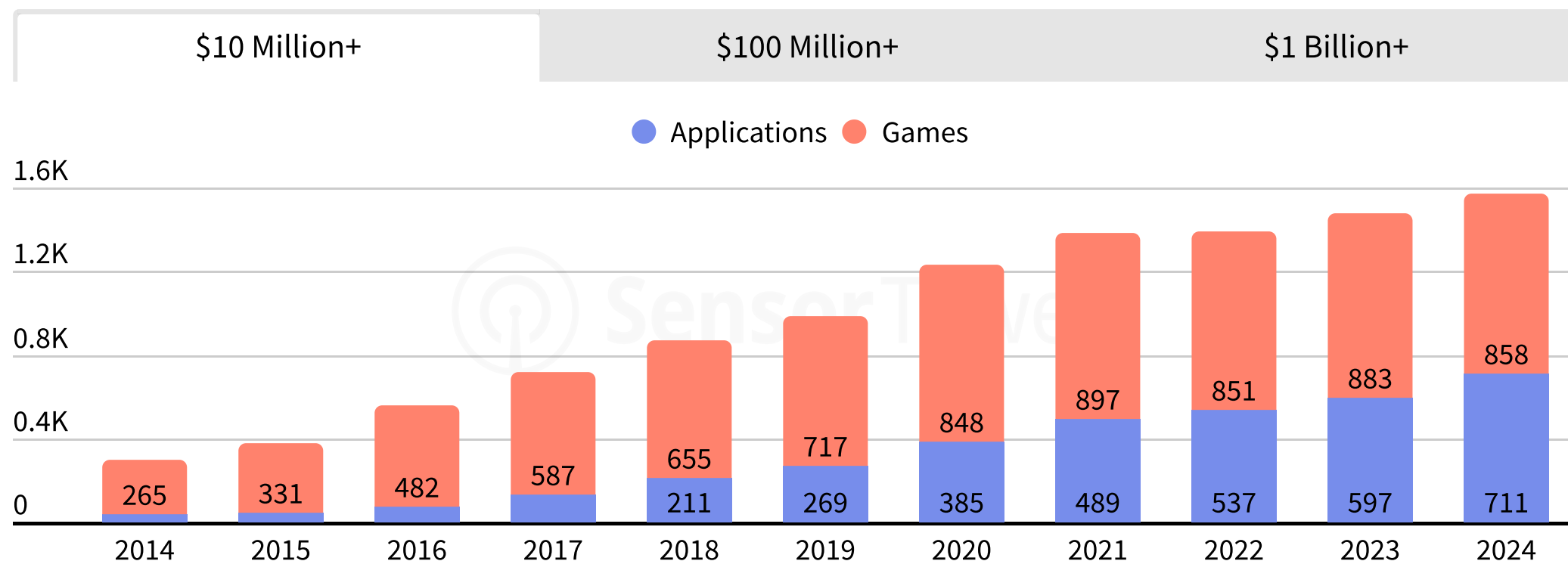
In total, 17 apps reached the billion dollar milestone in 2024, including six non-games and a record-high 11 games. And while the number of apps reaching the \$100 million and \$10 million milestones for annual IAP revenue have held fairly steady in recent years, improving revenue opportunities for non-games have caused the number of non-games to reach these thresholds to steadily climb, offsetting recent declines in the number of games hitting the marks.

Explore the Full List of Leaders in 2024

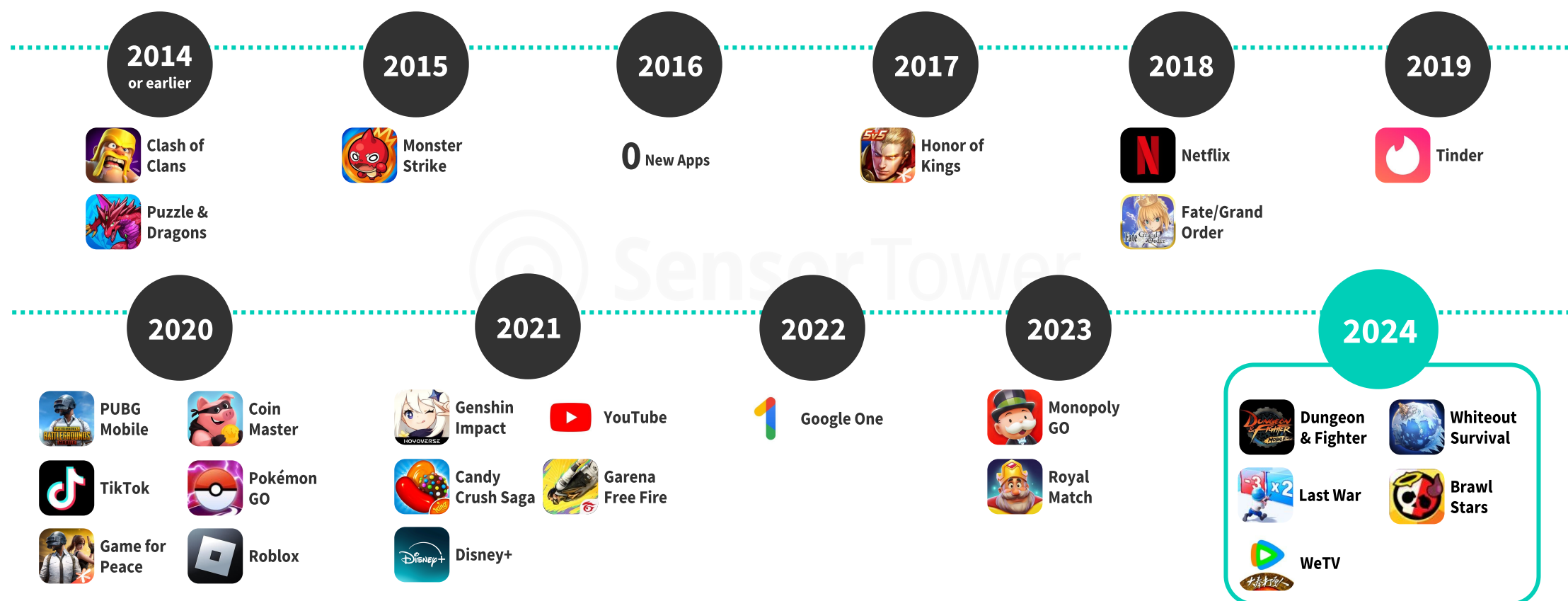
Sensor Tower customers can [explore the full list of Top Apps in 2024](#), by category, market, and device. Please note that the Sensor Tower platform shows *net revenue*, excluding any percent taken by the app stores.

Source: Sensor Tower
 Note: iOS and Google Play combined. iOS only for China. Revenue is gross — inclusive of any percent taken by the app stores. Includes estimates since the start of 2014.

Number of Apps Surpassing Annual Global IAP Revenue



Apps to Reach \$1 Billion in Annual Global IAP Revenue for the First Time



Mobile is Global: Only 21-22% of Downloads and Consumer Spend Come from Domestic Publishers

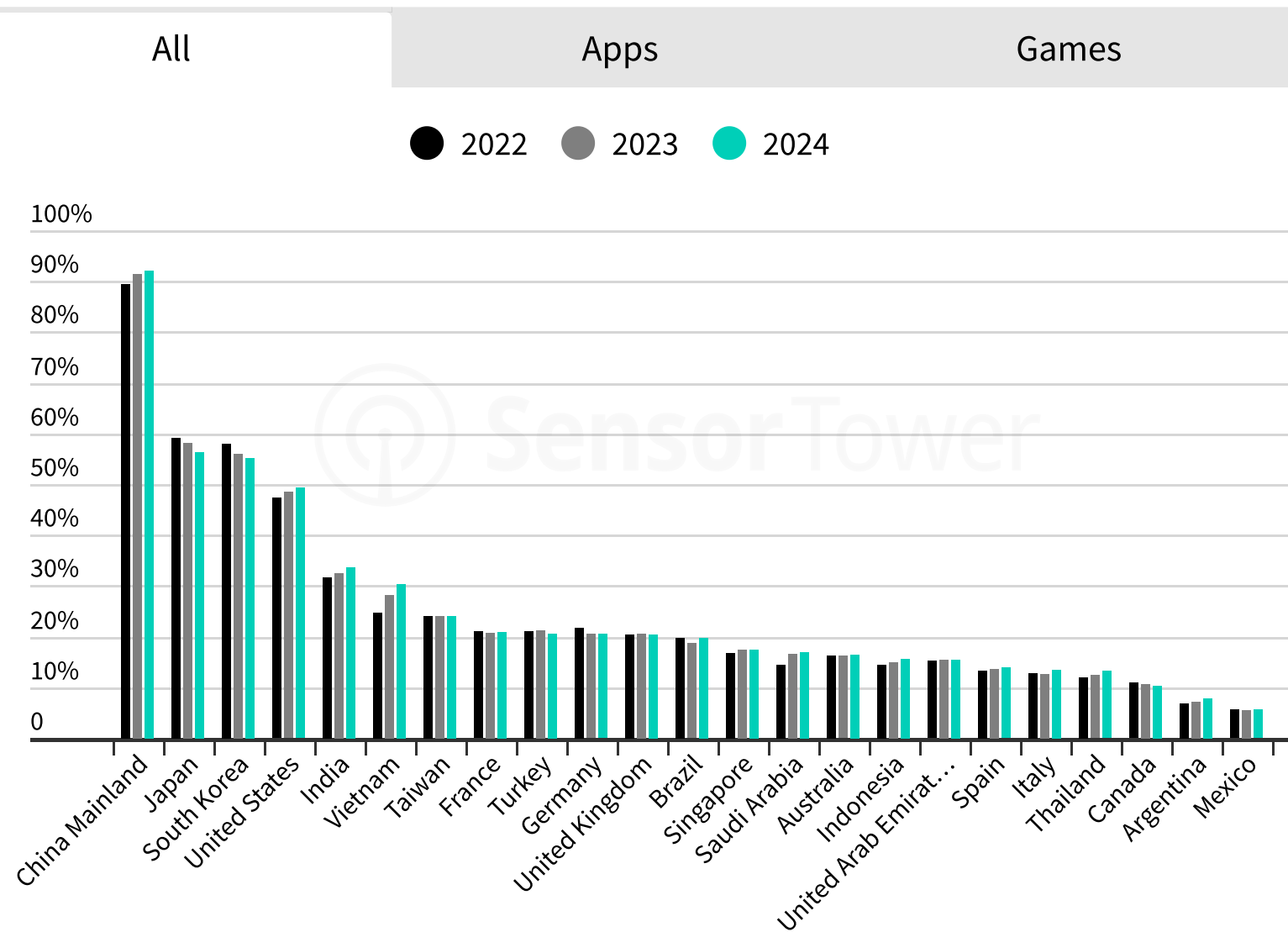
Nearly four out of every five app downloads and dollars spent across iOS and Google Play was outside of the country where the app was developed. However, the presence of foreign-based publishers varied significantly between markets. In China Mainland, more than 90% of downloads and consumer spend was for apps developed by China-based publishers. Japan, South Korea, and the US also had a strong presence from domestic-based publishers.

Want to See the Top Publishers in these Markets?

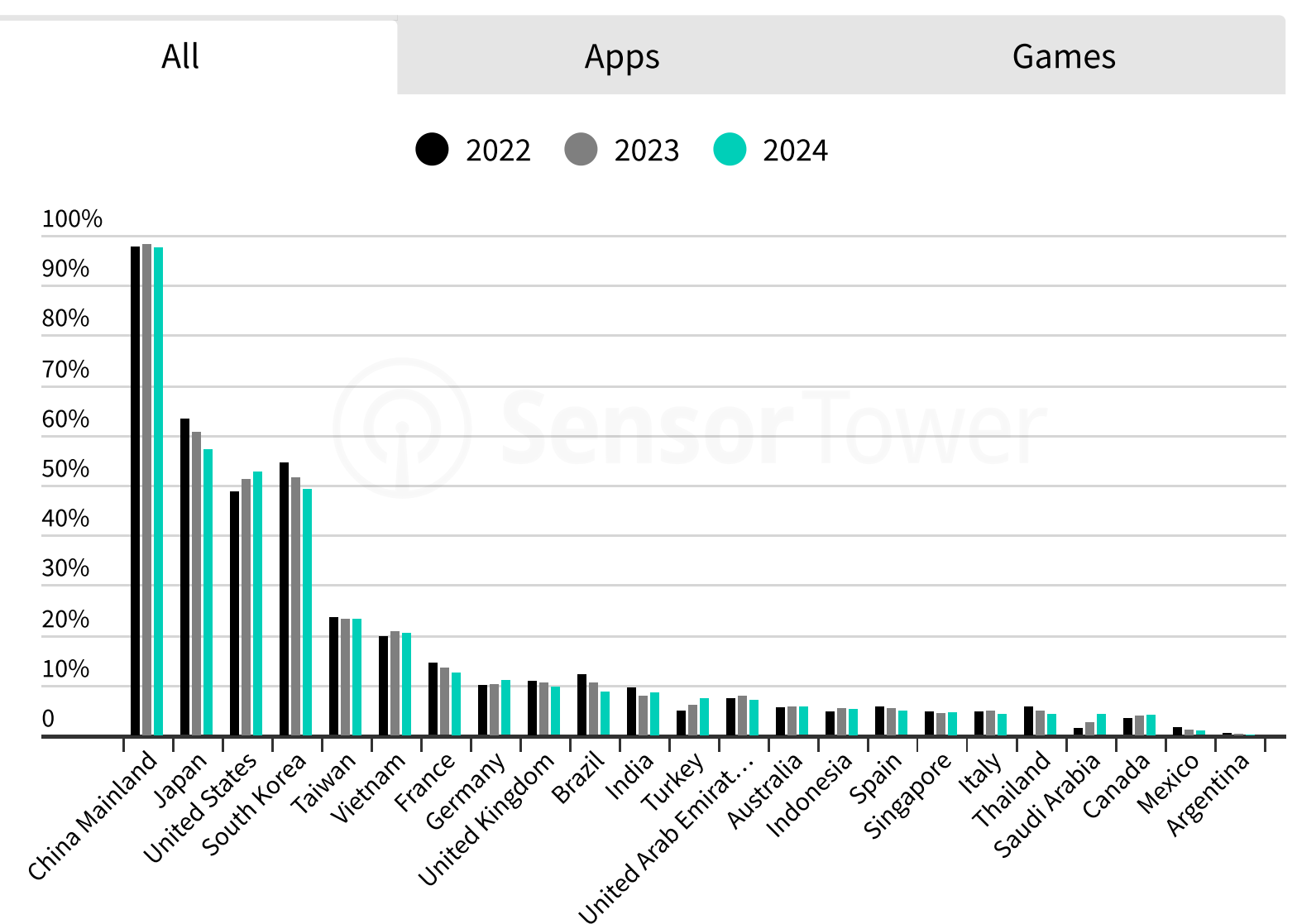
Go to the [end of this report](#) for the full lists of top apps, games, and publishers for 2024.

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

Share of Market's Downloads from Domestic Publishers



Share of Market's IAP Revenue from Domestic Publishers



Gen Z Embraces User-Generated Content, from Videos to Pinboards

Creative categories like Graphics & Design and Photo & Video are particularly appealing to younger users, as are Entertainment and Social Networking apps. Meanwhile, Productivity, Shopping, Health & Fitness, and Medical apps skew more towards older users. Looking at top apps for different age groups, apps like Spotify, Instagram, Discord, and Snapchat are more popular with younger users. Amazon and Venmo are frequently used by middle-aged users, while Facebook and Walmart skew towards an older demographic.

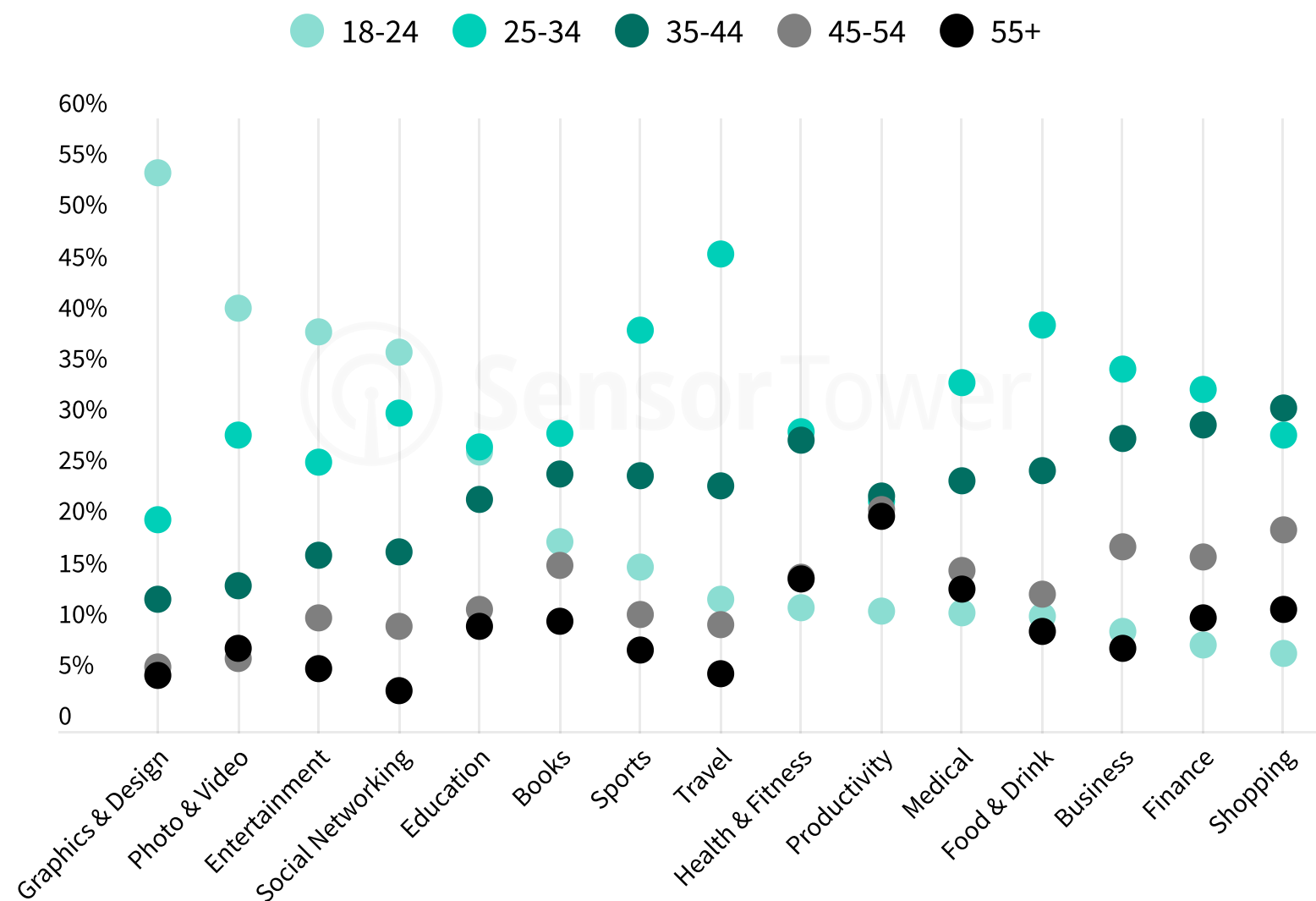
Interested in more Audience Insights?

Dive deeper into audience demographics and behavior by app, category, user persona, and more! [Click here to learn more about Audience Insights from Sensor Tower.](#)

Source: Sensor Tower
Note: Among Android users in the United States. Includes YouTube and excludes other pre-installed apps.

Age Breakdown Among Select Categories

United States in Q4 2024



Top Apps by Share of Audience Using App

United States in Q4 2024

	18-24	25-34	35-44	45-54	55+
1	YouTube	YouTube	YouTube	YouTube	YouTube
2	Spotify	Spotify	Amazon	Amazon	Facebook
3	Instagram	Instagram	Messenger	Facebook	Amazon
4	Discord	Amazon	Facebook	Messenger	Messenger
5	Amazon	Messenger	Instagram	Instagram	Instagram
6	Snapchat	Facebook	Spotify	Spotify	WhatsApp
7	Facebook	WhatsApp	WhatsApp	WhatsApp	Spotify
8	TikTok	Venmo	Venmo	Venmo	Walmart
9	WhatsApp	Reddit	Netflix	Netflix	TikTok
10	Pinterest	Discord	Reddit	TikTok	Netflix



Graphics & Design and Shopping Skew Towards Women

For the Graphics & Design, Shopping, and Books categories, women outnumber men by at least two to one in the United States on average. Sports, Finance, Travel, and Business are more commonly used by men on average. Top apps tend to have a large user base with both men and women, but a few apps rank among the top 10 for one gender. [Discord](#) and [Reddit](#) are among the top 10 for men only, while [Pinterest](#) and [TikTok](#) rank among the top 10 for women only.

Sensor Tower Customers Can Explore More!

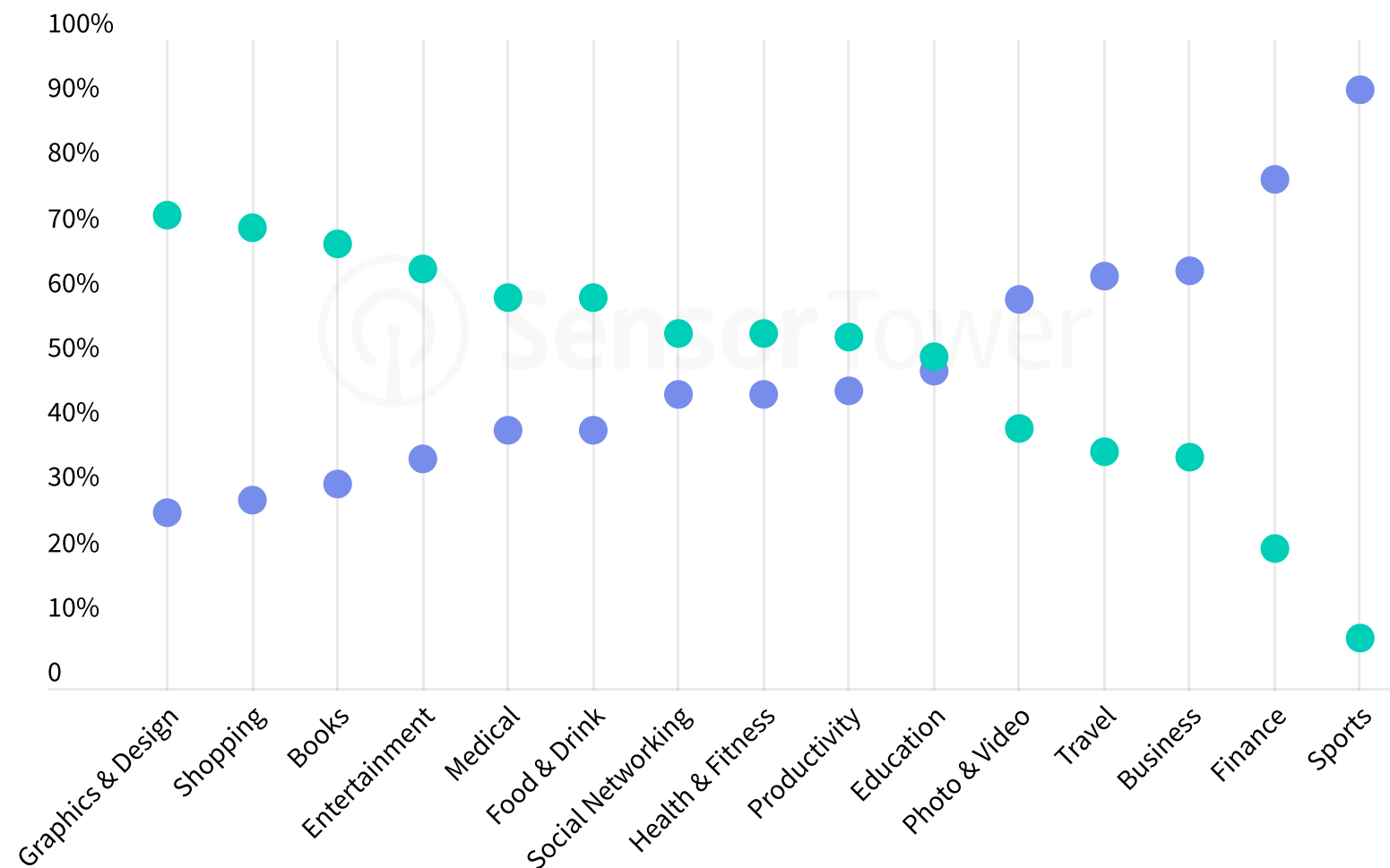
Sensor Tower customer? [Check out Audience Insights here](#) for more categories, user personas, and so much more.

Source: Sensor Tower
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.

Gender Breakdown Among Select Categories

United States in Q4 2024

● Men ● Women

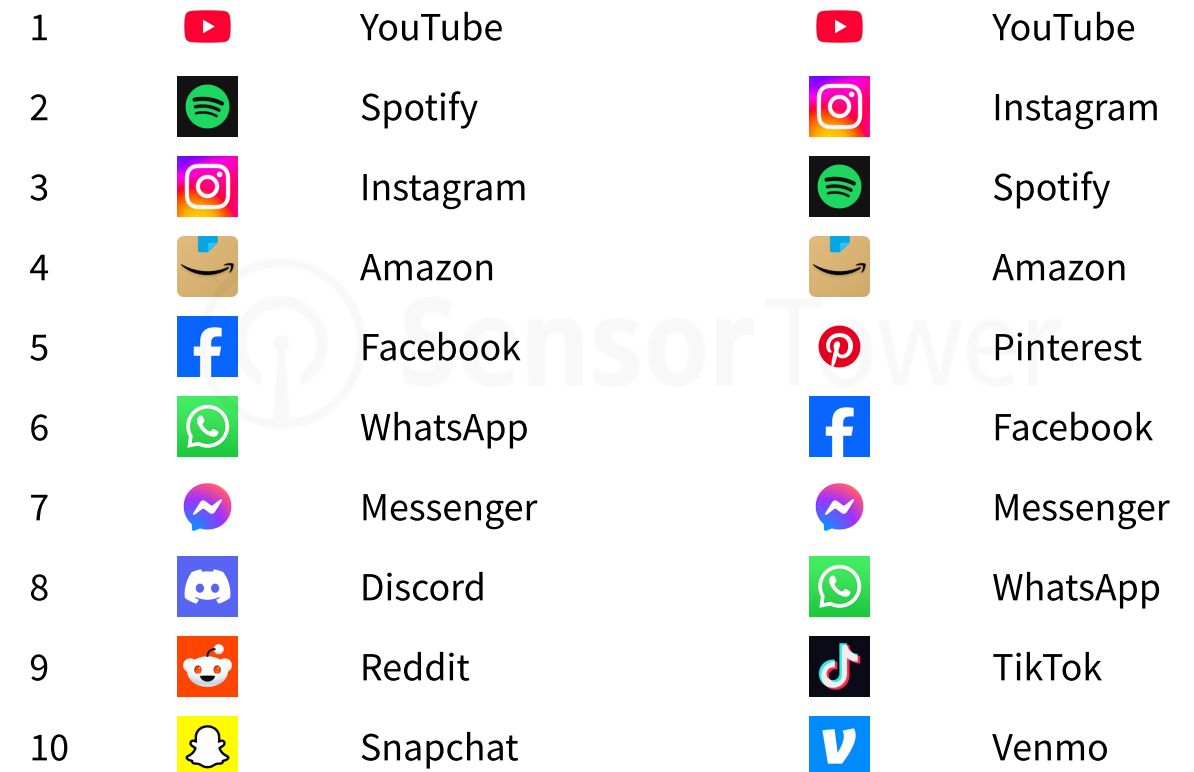


Top Apps by Share of Audience Using App

United States in Q4 2024

Men

Women



02

AI on Mobile

AI continued its rapid ascent on mobile in 2024. Generative AI was the breakout mobile genre, and market leaders across verticals found creative new ways to integrate AI into their mobile solutions.



Fetch is America's Rewards App because we're obsessed with innovation that delivers real value to both brands and consumers. As mobile apps continue to drive the rise of e-commerce, Fetch is leading the way by expanding our rewards ecosystem into new consumer categories and introducing groundbreaking features like Fetch Play and Fetch Shop. Powered by patented AI and ML integrations, our mobile platform transforms everyday purchases and activities into highly personalized, rewarding experiences. We're redefining how people connect with the brand they love and find new ones to fall in love with, by creating a first-of-its-kind, rewards-based advertising ecosystem that delivers both rational and emotional value.



Ayo Jimoh
Chief Product Officer
Fetch



AI Apps are Already a Billion Dollar Industry

Generative AI apps exploded onto the scene in late 2022 with interest in the technology surging following the release of [ChatGPT](#). Other competitors quickly attempted to capture some of this market. IAP revenue from AI Chatbot and AI Art Generators climbed from \$30 million in 2022 to \$455 million in 2023 to nearly \$1.3 billion in 2024. Downloads saw a similar trajectory, approaching 1.5 billion in 2024.

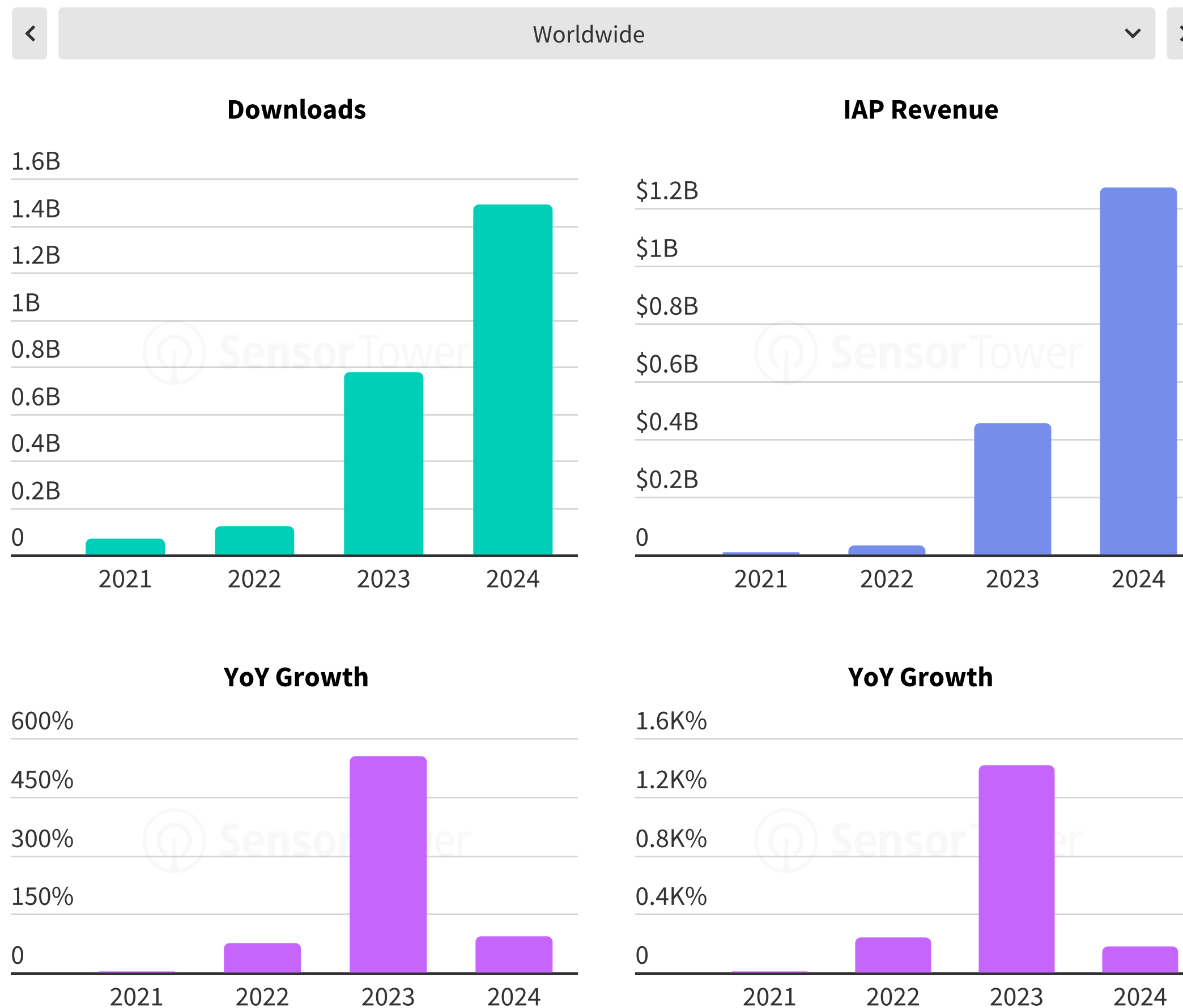
The United States is the clear top market for Generative AI apps in 2024, accounting for 45% of global revenue. The United Kingdom is second with around 4% of total revenue, followed by Germany (4%), Japan (3%), and Canada (3%). The genre is also quite popular in Brazil, which ranks #7 for Generative AI (and outside the top 10 markets by overall mobile consumer spend). Generative AI revenue is lagging a bit in China Mainland, which accounted for less than 2% of the genre's IAP revenue in 2024.

Want More AI Insights?

Check out [our report covering the AI app market from 2024](#). And since the AI app market is ever evolving, look out for more AI-related content on [our blog](#).

Source: Sensor Tower
 Note: iOS and Google Play combined. iOS only for China. Revenue is gross — inclusive of any percent taken by the app stores. AI apps classified using Sensor Tower's taxonomy as of January 5, 2025.

Yearly Trends for Generative AI Apps



Chatbots are the Leaders in AI (For Now At Least)

By the end of 2024, some of the biggest tech companies in the world have rolled out their AI chatbots, including [Google Gemini](#), [ByteDance's Doubao](#), and [Microsoft Copilot](#). With these major players entering the space, AI Chatbot downloads climbed 119% YoY in Q4 2024. AI Art Generators trailed with 85 million downloads, up 21% YoY.

While [ChatGPT](#) is the clear leader with roughly 40% of global Generative AI app consumer spend and 23% of downloads in 2024, there has been plenty of space for other apps to emerge. Sixteen different Generative AI apps reached at least \$10 million in IAP revenue in 2024, and 25 had more than 10 million downloads.

As of the end of 2024, AI Chatbots are the most popular subgenre in the Generative AI space. However, plenty of other apps across genres from Travel to Education to Social Networking have incorporated their own AI features, and there remains huge potential for apps to try novel and creative ways to incorporate the technology

Track the Latest AI Launches with Top Apps

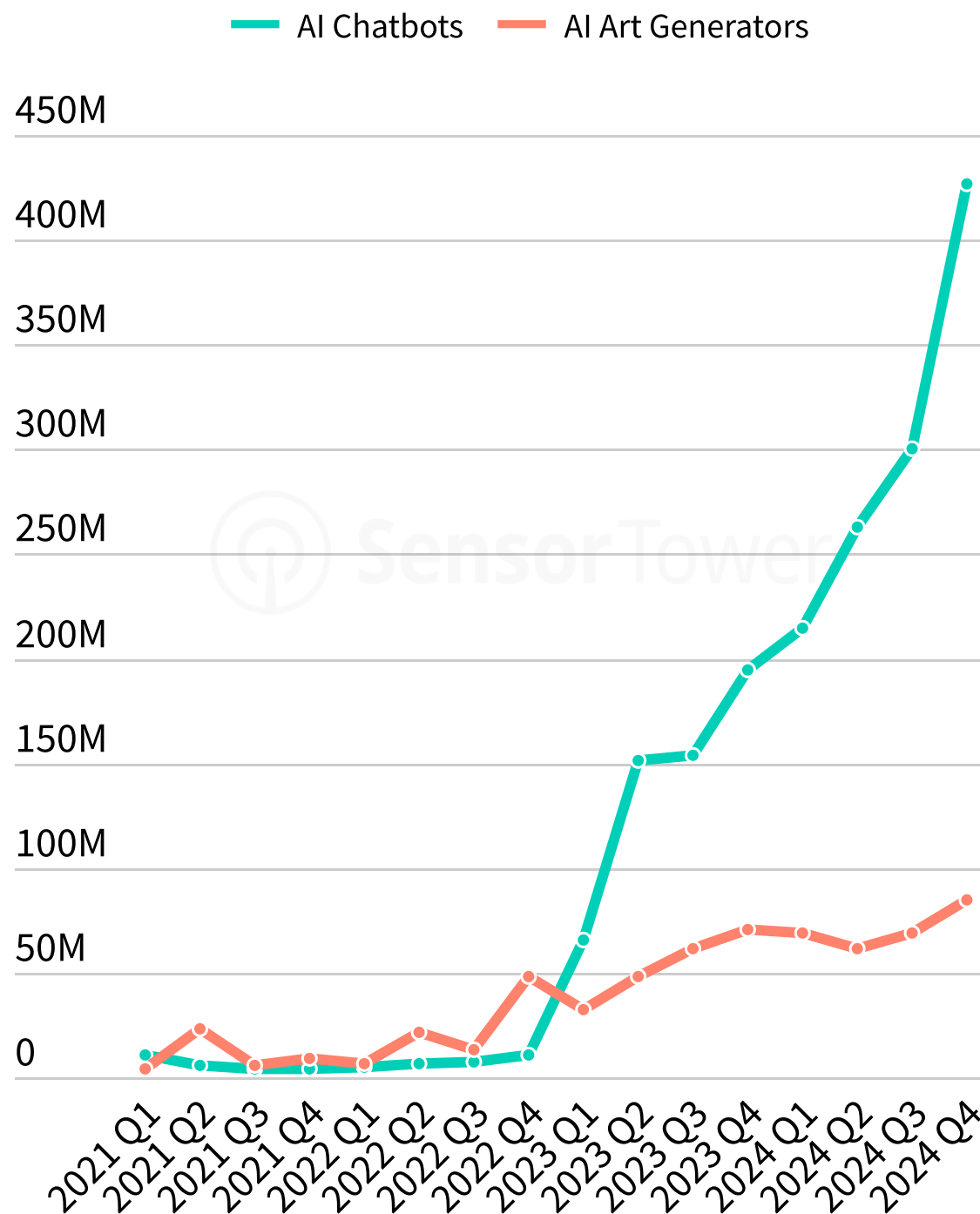
Monitor how the top AI apps are performing in 90+ markets and quickly identify any new breakouts with Sensor Tower's Top Apps. Sensor Tower customers can [check it out here](#).

Source: Sensor Tower
 Note: iOS and Google Play combined. iOS only for China. AI apps classified using Sensor Tower's taxonomy as of January 5, 2025.

Generative AI Download Trends by Subgenre

< Worldwide >

Quarterly Downloads by Subgenre



Top Apps by Downloads in 2024

Rank	App	Subgenre
1	ChatGPT	AI Chatbots
2	Google Gemini	AI Chatbots
3	Doubao	AI Chatbots
4	Microsoft Copilot	AI Chatbots
5	AI Chatbot - Nova	AI Chatbots
6	Talkie	AI Chatbots
7	Chatbot AI & Smart Assistant	AI Chatbots
8	ChatOn	AI Chatbots
9	Character AI	AI Chatbots
10	Genius	AI Art Generators

AI Has Spread Across Mobile, From Productivity to Lifestyle to Finance

App developers were quick to respond to interest in AI in 2023, and the number of apps adding AI-related terms to their app names or descriptions more than doubled compared to 2022. This included new apps released in 2023 with these AI-related terms as well as apps updating their name or description during the year to include the term. Note that even more apps likely use AI technology, but don't mention "AI" or "GPT" in their app name or description.

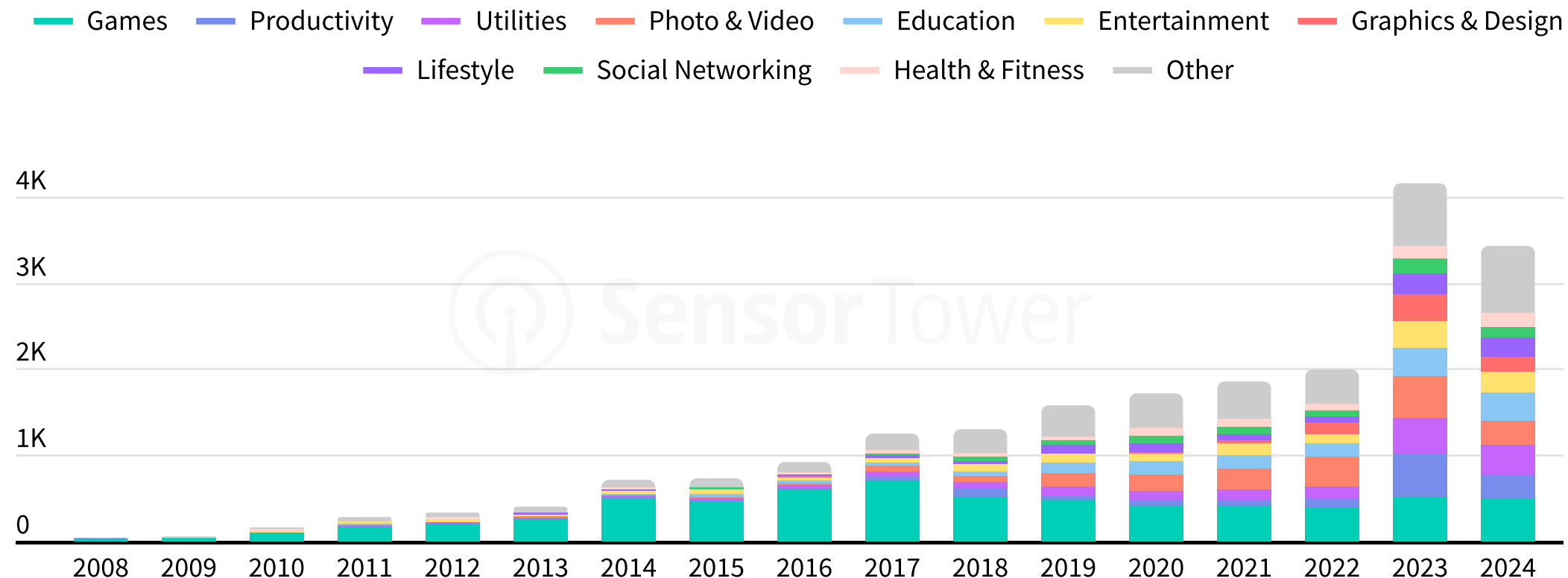
The number of apps adding AI-related terms declined in 2024, but interest remained high. More than 3,000 apps mentioned AI for the first time in 2024.

The use of AI technology is also becoming much more widespread. Fifteen different categories had at least 100 apps add AI-related terms over the past two years alone. This includes the expected categories like Productivity, Photo & Video, and Education, and various other categories across the mobile space like Lifestyle, Finance, Music, and Shopping.

Track More Than App Names and Descriptions
 Sensor Tower's [App Update Timeline](#) lets you track your competitors' app updates, from app names and icons to top in-app purchase and in-app events.

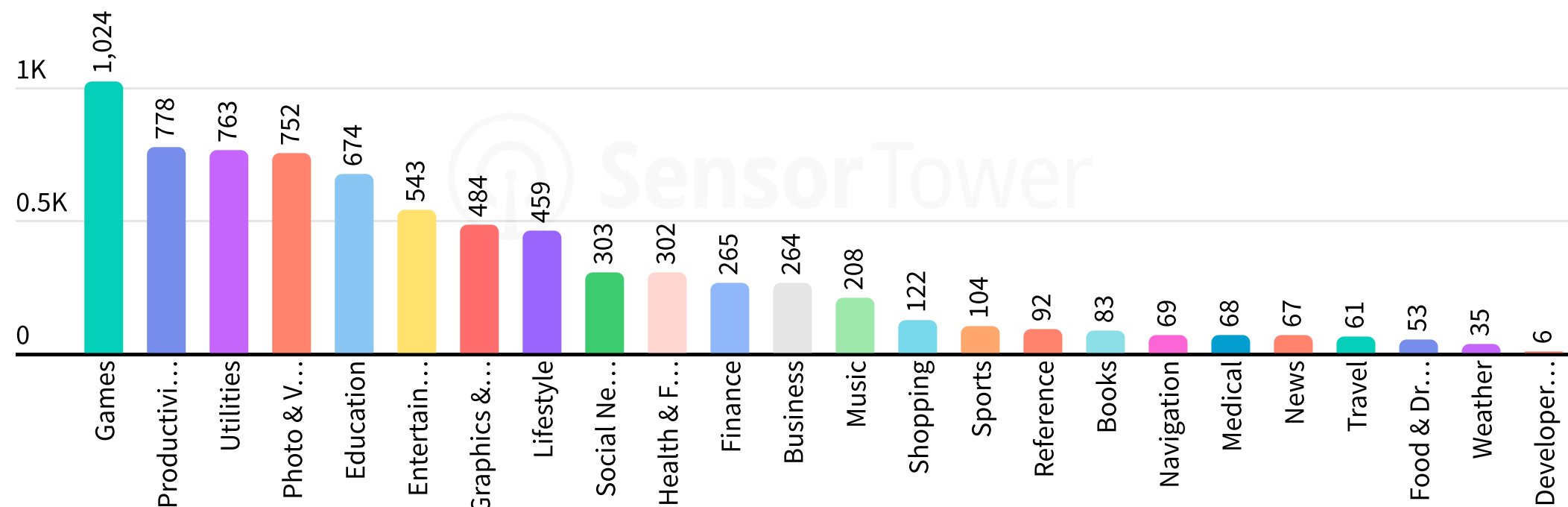
Source: Sensor Tower
 Note: Includes apps with at least 50,000 worldwide all-time downloads across iOS and Google Play. Includes apps mentioning "AI", "GPT", or "OpenAI" in their app name, app description, subtitle (iOS), or short description (Google Play).

Number of Apps Adding AI-Related Terms Over Time by Category



Number of Apps Adding AI-Related Terms by Category

2023-2024

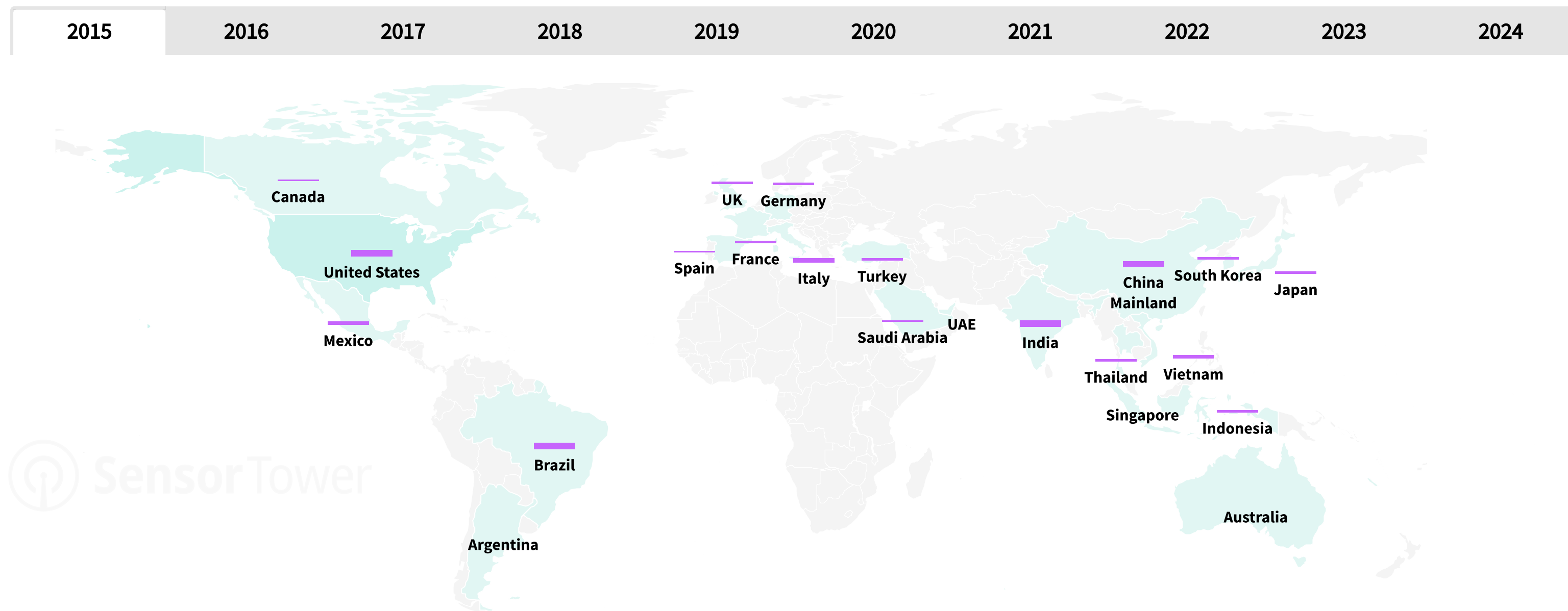


Apps Mentioning AI Were Downloaded 17 Billion Times in 2024

iOS and Google Play apps mentioning AI-related terms in their name, subtitle, or description combined for more than 17 billion downloads globally in 2024, up from 5 billion downloads just five years prior in 2019. This was roughly 13% of all app downloads in the year. Explore how downloads for these apps have climbed across key markets over the past 10 years — including India, the United States, China Mainland, Indonesia, and Brazil each contributing more than a billion downloads in 2024.

Source: Sensor Tower
Note: Downloads across iOS and Google Play. iOS only for China. Includes apps with at least 50,000 worldwide all-time downloads across iOS and Google Play. Includes apps mentioning "AI", "GPT", or "OpenAI" in their app name, app description, subtitle (iOS), or short description (Google Play).

Downloads for Apps Mentioning AI Over Time by Market



Stay Ahead of Competitors with AI Innovations

In today's competitive mobile market, there is a growing trend of integrating AI-powered features into applications to attract tech-savvy users and enhance overall convenience. App developers should think carefully about how to integrate the technology in ways that will improve the user experience, rather than selling minor adjustments to existing features.

Duolingo is an example of an app that was quick to embrace AI features, launching several GPT-4 powered offerings in March 2023 with Duolingo Max. However, many users did not see the improvements from AI and viewed this as charging a higher price for features that used to be provided under the cheaper Super subscription.

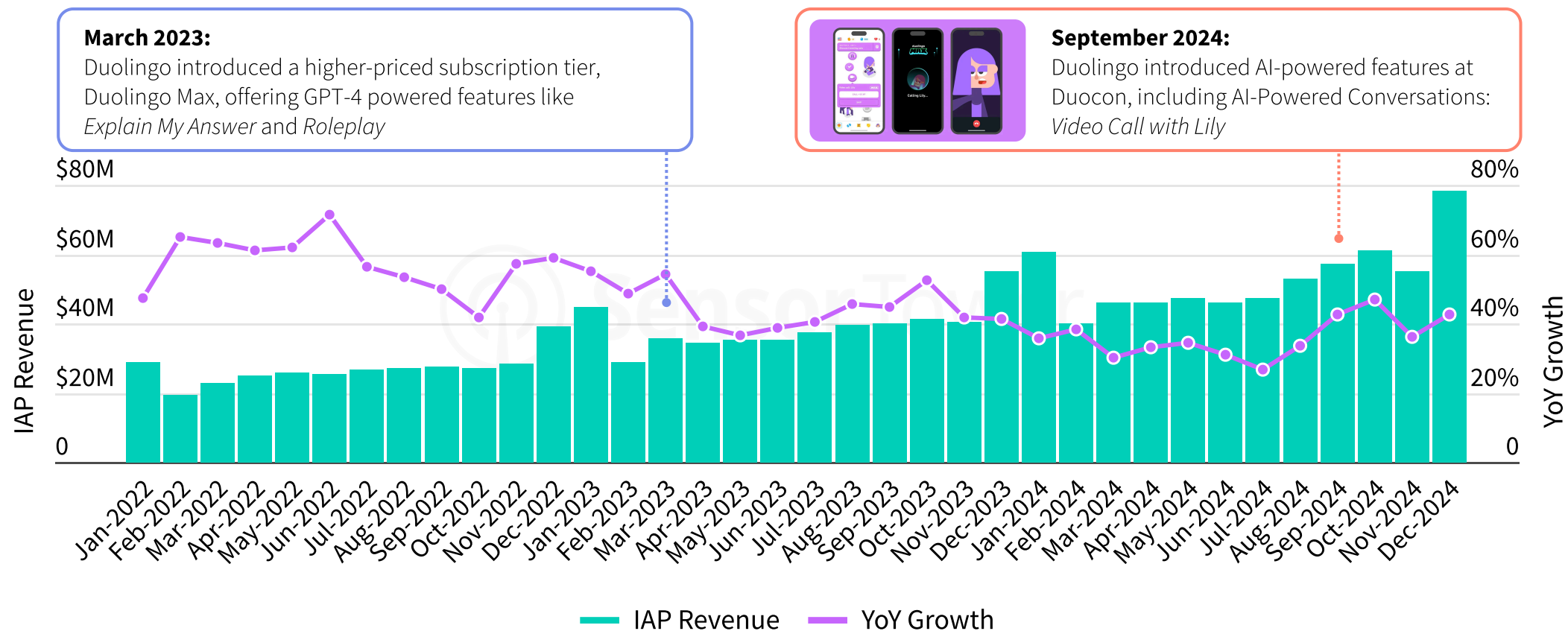
Duolingo took a significant step forward by launching AI-powered video calls in September 2024. This new feature received positive feedback from users, highlighting its effectiveness in enhancing language practice through simulated real-life conversations and leaning on positive sentiment about a character in the app, Lily. The new offerings appear to be boosting revenue as well, with the app achieving its highest monthly YoY revenue growth since 2023.

Discover How Users React to New Features

Review Analysis from [Sensor Tower's App Performance Insights](#) lets you search reviews by keyword

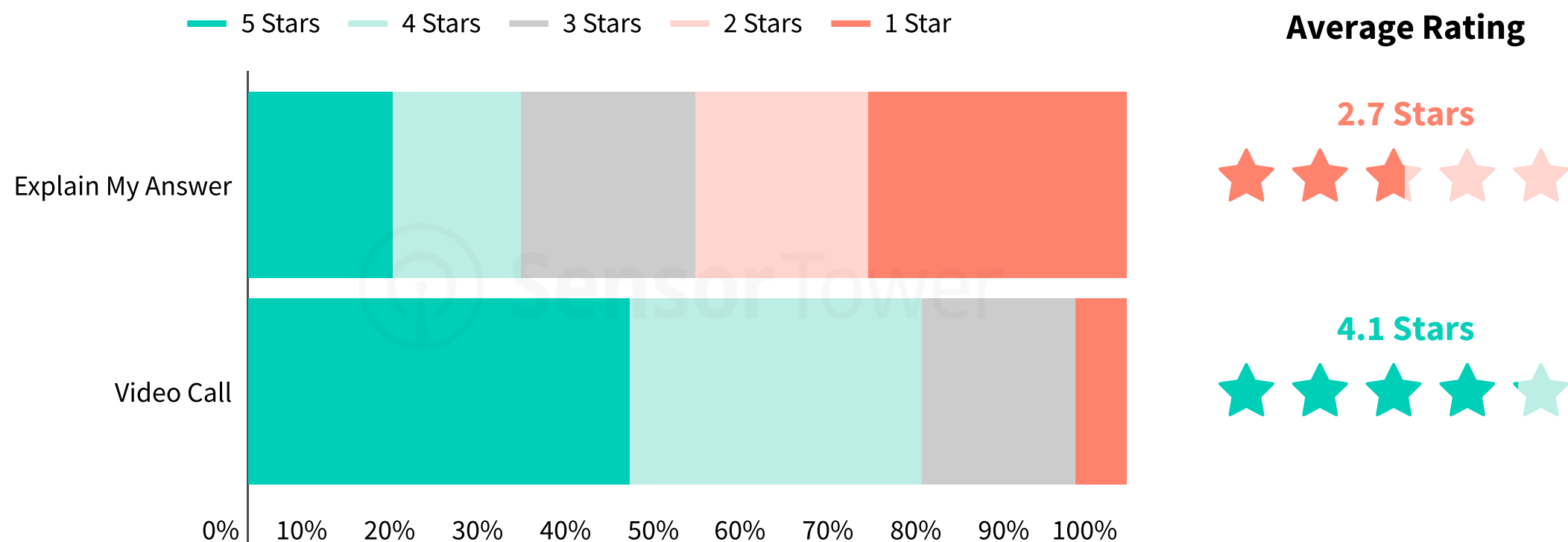
Source: Sensor Tower
 Note: iOS and Google Play combined. iOS only for China. Revenue is gross — inclusive of any percent taken by the app stores.

Duolingo Worldwide Monthly IAP Revenue



User Rating Distribution for Reviews Mentioning New AI Features

United States on iOS



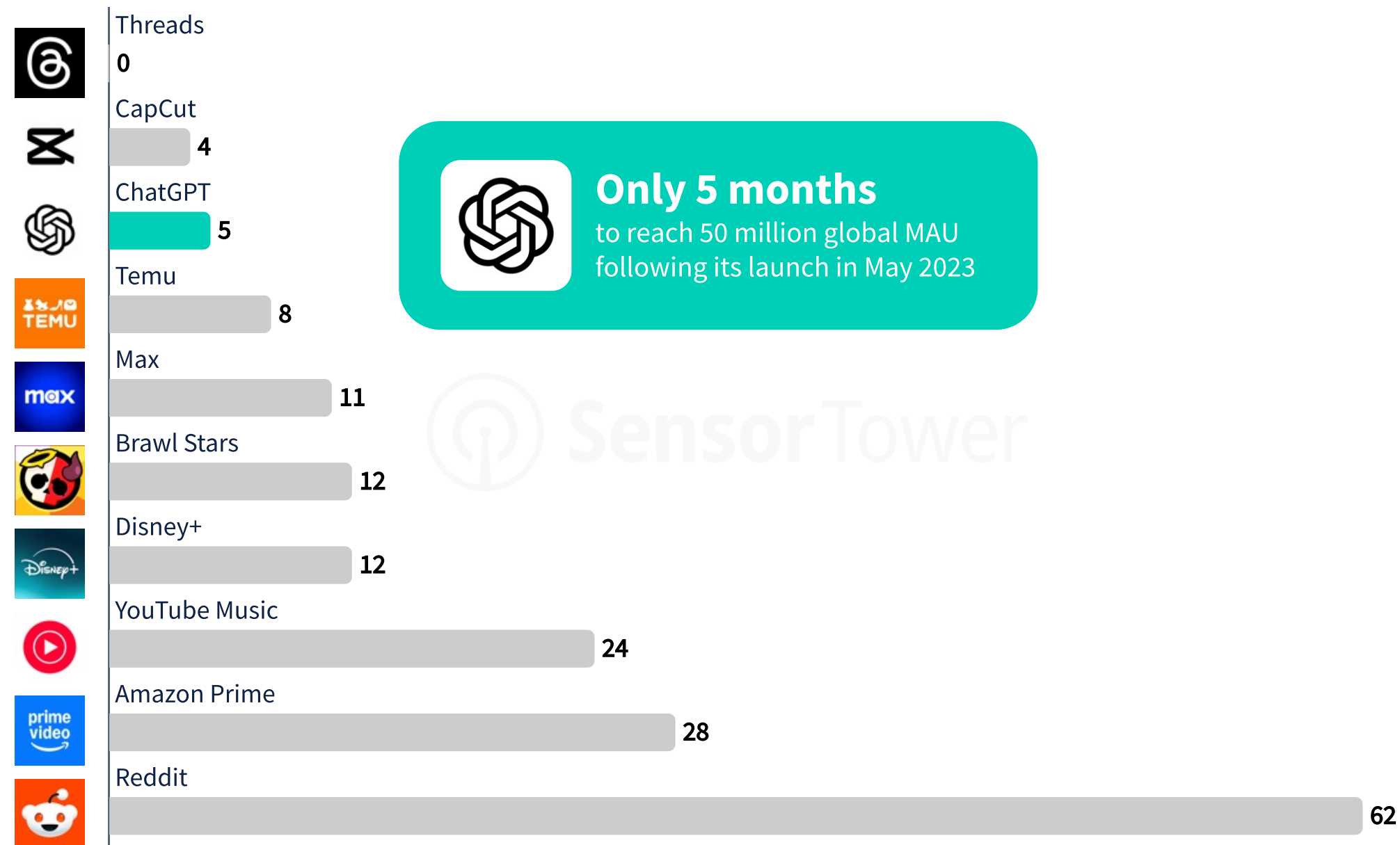
ChatGPT Reached 50 Million MAU Milestone Faster than Temu, Disney+, and YouTube Music

ChatGPT's worldwide mobile usage has skyrocketed since its launch, with MAUs increasing by 500% YoY or more than 160 million in 3Q24—the largest absolute increase among the studied cohort. Among popular apps released in the past three years, ChatGPT was the third-fastest to reach 50 million MAUs worldwide, achieving this milestone in a mere five months after its launch in May 2023. This was all the more impressive considering the app only launched on Google Play in July 2023, several months after it was released on iOS.

Only Threads and CapCut reached this level faster, and CapCut had a significant head start by launching in China prior to its global release. Threads also benefitted from cross-promotion from Meta's other apps like Instagram, helping it tap into Meta's huge existing user base. Looking at purely organic growth, few apps have ever burst onto the scene faster than ChatGPT.

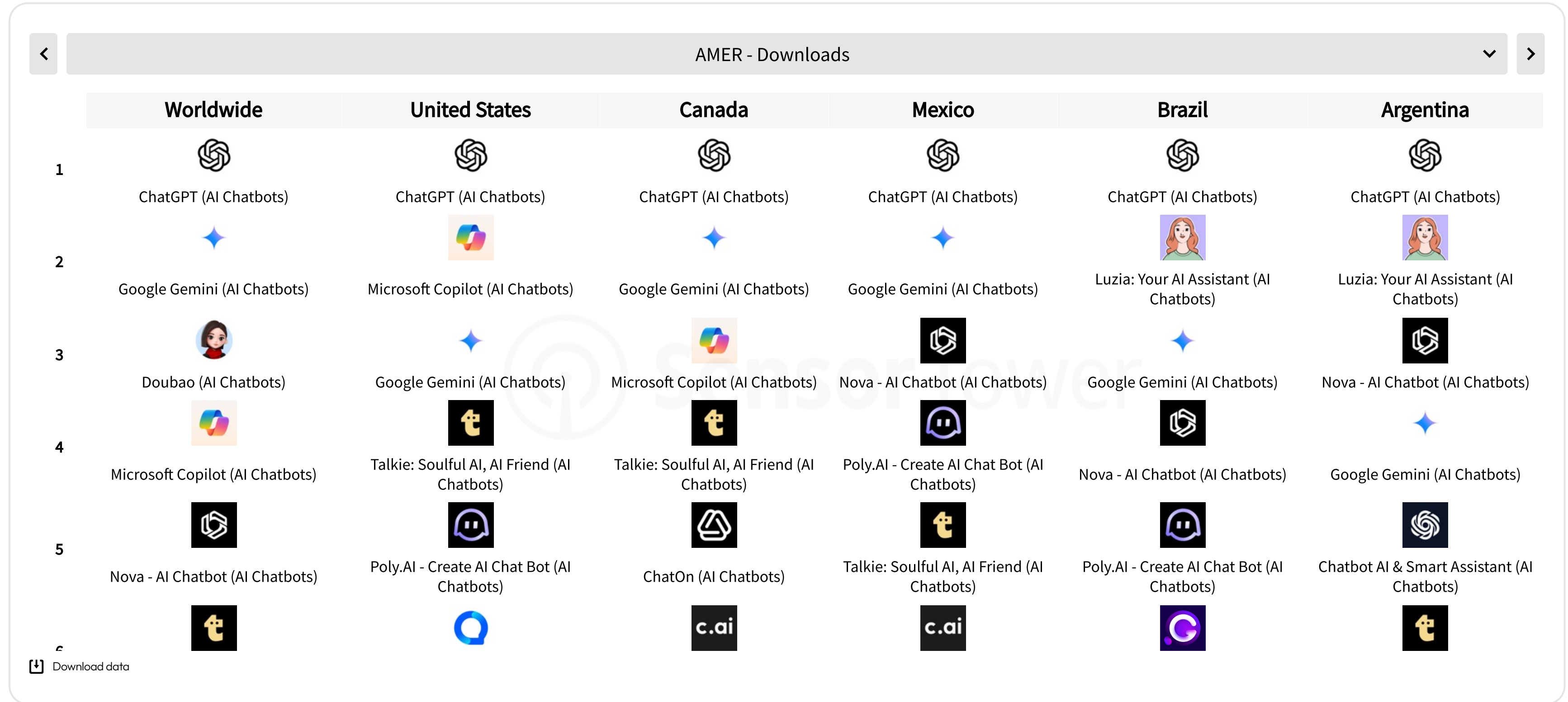
Source: Sensor Tower
 Note: iOS and Google Play combined. iOS only for China. Excludes third-party Android.

Months to Reach 50 Million Global Monthly Active Users (MAU)



*Includes select apps with a worldwide release date of 2016 or later and a minimum of 100 million all-time downloads. Some apps, such as Amazon Prime Video, may have been launched earlier in specific countries but had their global release in 2016 or later.

2024 Rankings by Market | AI on Mobile



Source: Sensor Tower
 Note: iOS and Google Play combined. iOS only for China. Apps classified using Sensor Tower's taxonomy as of January 5, 2025. Revenue is gross — inclusive of any percent taken by the app stores.

03

Gaming

Mobile gaming bounced back with positive year-over-year IAP revenue growth for the first time since 2021. However, the landscape has changed over the past few years, with Strategy and Puzzle driving growth while RPG continued to decline.



Data is paramount to everything we do internally at Kwalee, and at gaming companies in general, the sheer amount of data points we capture is mind-boggling. Sensor Tower adds the external dimension which gives us the comparable we need to understand if what we're doing is working? Has a market fit? And equally important, is potential trends for us to innovate on.



John Wright
VP of Mobile Games
Kwalee

Mobile Game Revenue Hits \$80.9 Billion in 2024 Amid Shifting Market Dynamics

Mobile game IAP revenue rose to \$80.9 billion in 2024, up 4% YoY, even as downloads declined by 6% to 49.6 billion. This decline reflects market stabilization amid industry consolidation and broader tech sector pressures. Despite this, consumers are spending more time on mobile devices and increasingly making purchases, driven by improved gaming experiences and enhanced monetization strategies.

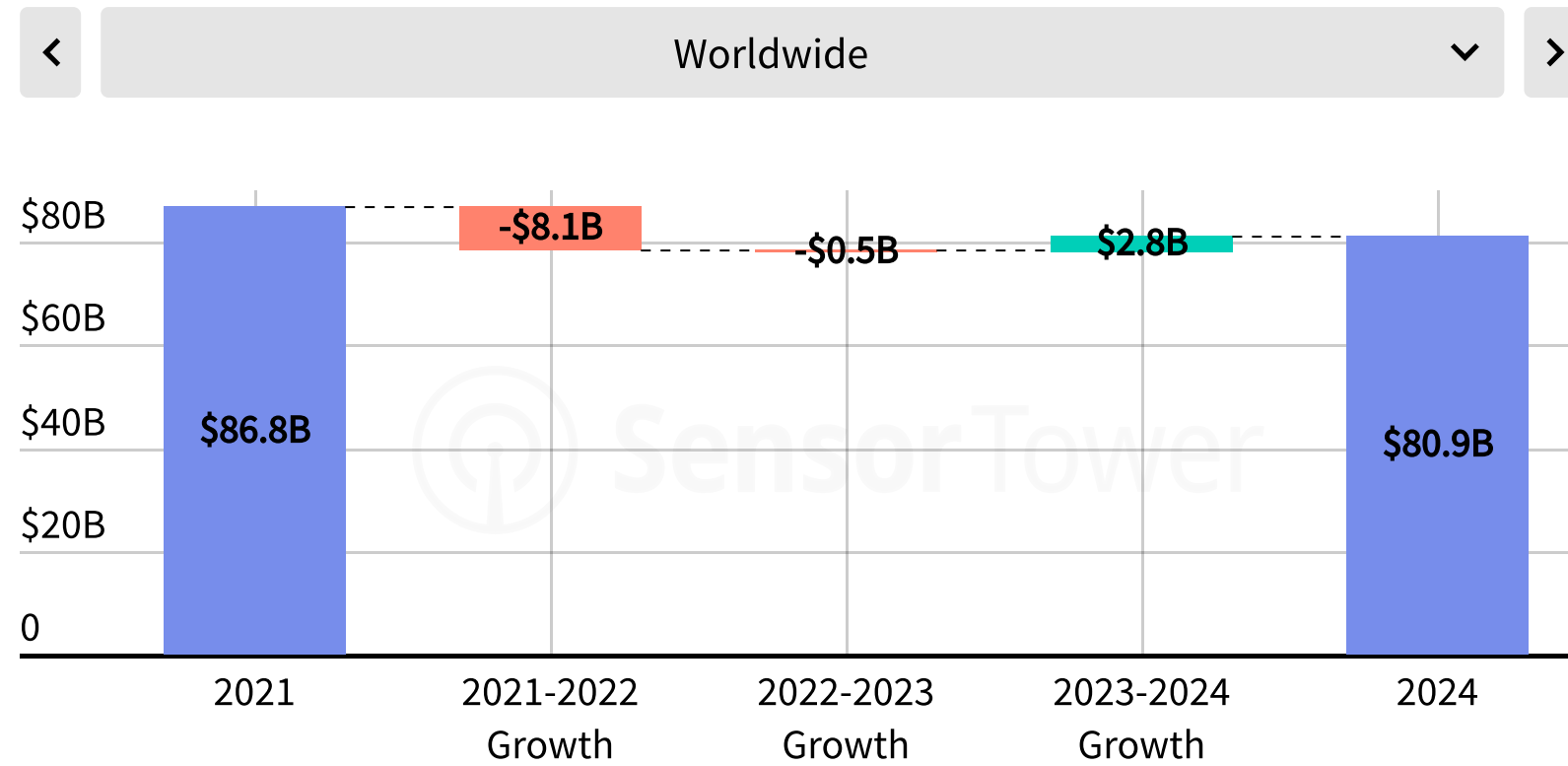
Emerging markets like Mexico, India, and Thailand fueled much of the growth, with spending rising 21%, 17%, and 16%, respectively. Turkey led with a 28% increase, while Saudi Arabia posted a 14% rise. Established markets such as the US and EMEAR regions saw steady growth, while North Asia faced headwinds, with Japan experiencing a 7% decline due to economic and currency challenges.

While most markets saw a decline in downloads, regions like Indonesia and Saudi Arabia provided bright spots of growth. Looking ahead to 2025, consumer spending is expected to climb further as developers prioritize retention and high-quality gaming experiences.

Want to See the Latest Gaming Trends?
 Monitor market movements day-by-day with a Sensor Tower account to get the scoop on the latest shifts and emerging opportunities.

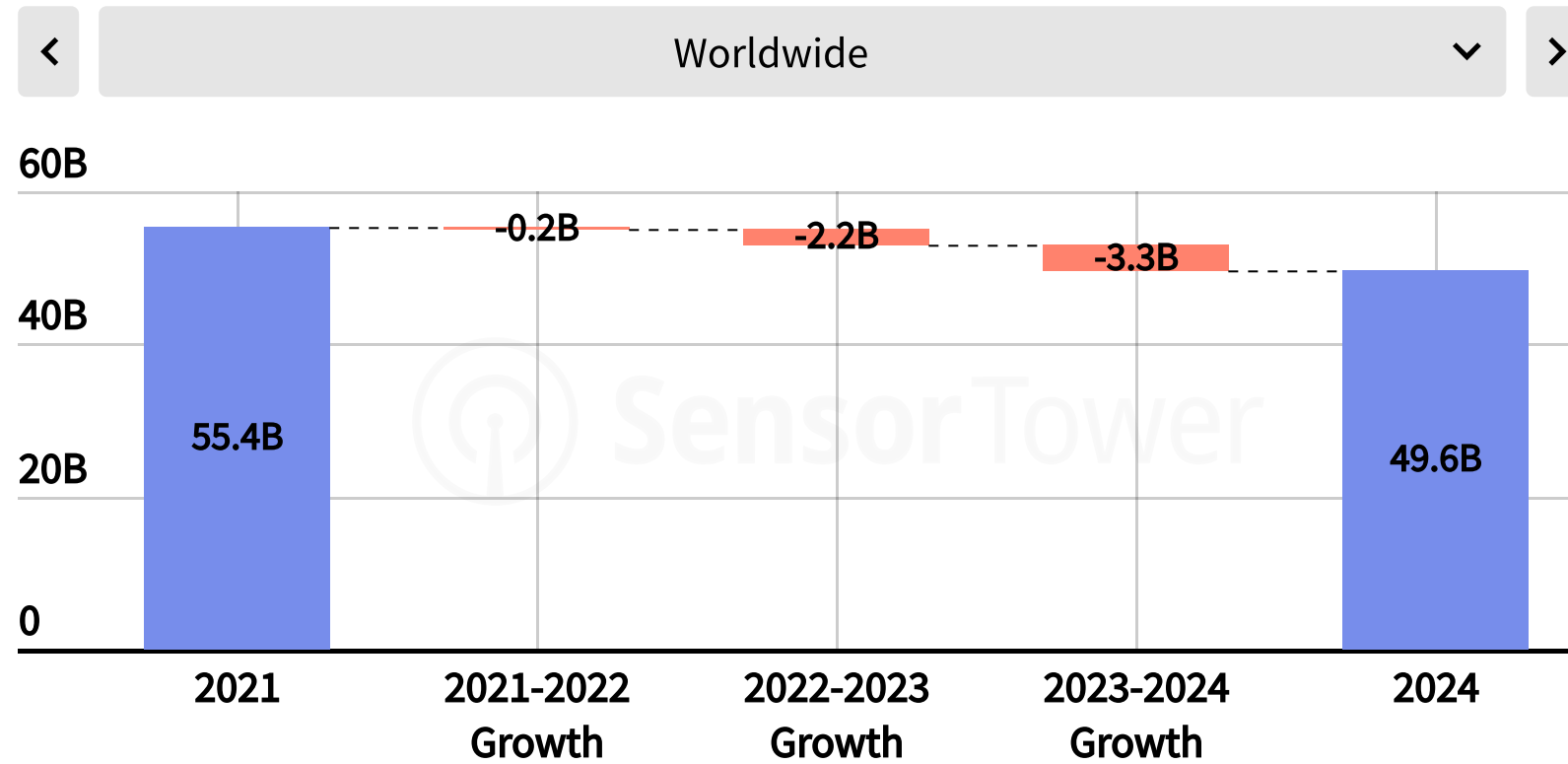
Source: Sensor Tower App Performance Insights as of January 5, 2025.
 Note: iOS and Google Play combined. iOS only for China. Revenue is gross — inclusive of any percent taken by the app stores.

Mobile Game IAP Revenue Growth



2024 IAP Revenue
\$80.9 Billion
 (+4% YoY)

Mobile Game Download Growth



2024 Downloads
49.6 Billion
 (-6% YoY)



Global Weekly Mobile Game Spending Surpasses \$1.54 Billion in 2024, with Downloads Nearing 1 Billion Per Week

Developing markets are increasingly important to the global mobile gaming economy, with spending and engagement steadily rising. Seasonal spikes vary by region: in the US, downloads and revenue peak during year-end holidays, while September sees the lowest downloads. In Japan, summer drives strong performance for downloads and revenue. Understanding these regional patterns is vital for developers aiming to maximize engagement and revenue in a competitive market.

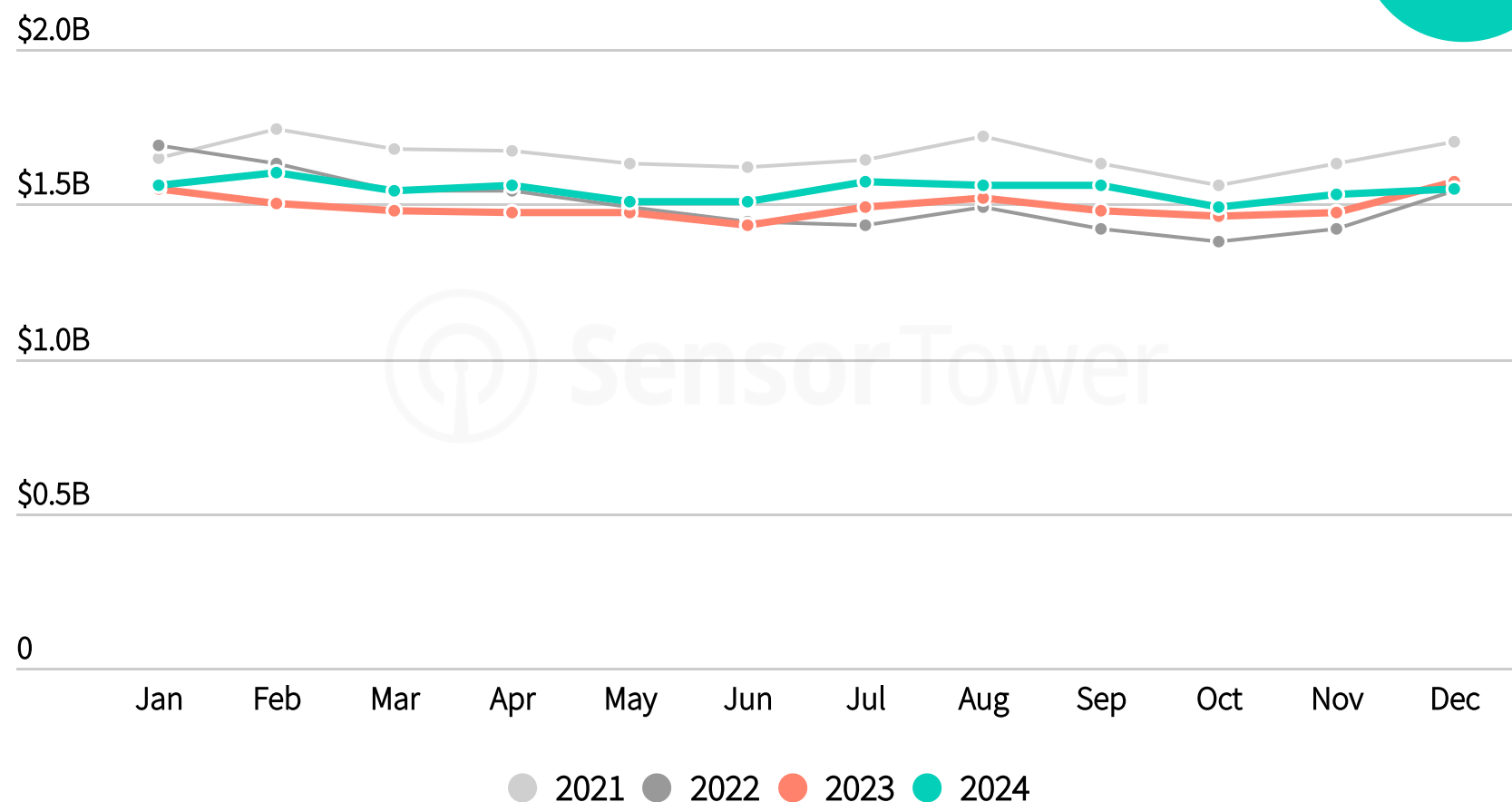
Source: Sensor Tower App Performance Insights as of January 5, 2025. Note: iOS and Google Play combined. iOS only for China. Revenue is gross — inclusive of any percent taken by the app stores.

< Worldwide >

Average Weekly IAP Revenue and Downloads for Mobile Games 2021 - 2024

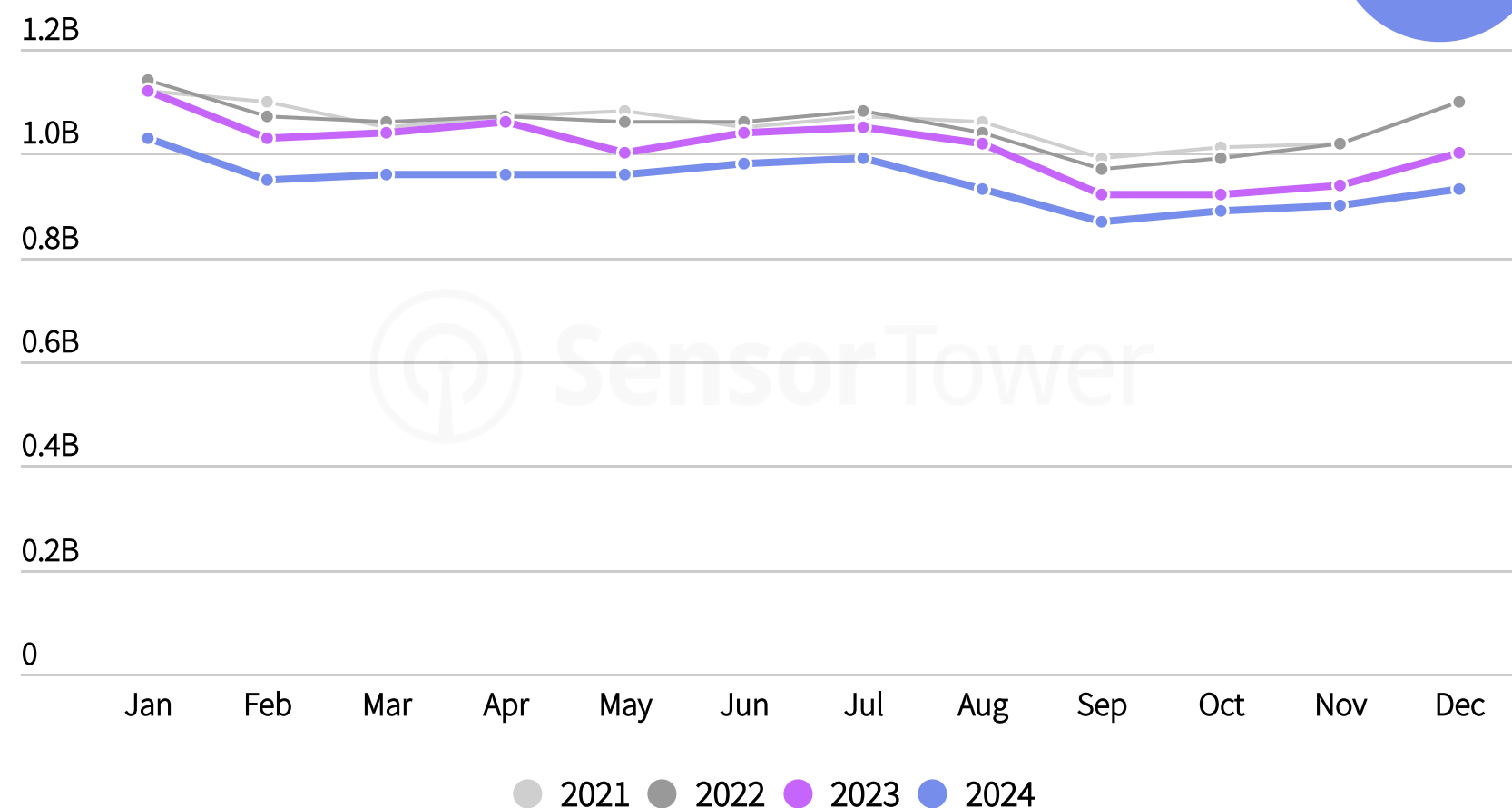
IAP Revenue

+4%
YoY



Downloads

-6%
YoY



Simulation and Puzzle Dominate 2024 Mobile Game Downloads, Strategy Showing Strong Momentum

In 2024, Simulation and Puzzle genres led global mobile game downloads, each capturing 20% of the total, with Simulation seeing slight growth (+0.4%) and Puzzle experiencing a modest decline (-3%). Arcade games, despite a significant 12.5% drop, maintained 19% of all downloads, reflecting their enduring popularity. Lifestyle and Action genres faced steeper declines, while Strategy games achieved notable growth (+14.5%) in downloads. Notably, Strategy games punched above their weight, commanding 21.4% of revenue despite accounting for only 4% of total downloads. These trends highlight a market where established genres continue to dominate, but emerging growth in niche categories offers new opportunities.

Source: Sensor Tower. 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 Game taxonomy as of January 5, 2025.

2024 | Worldwide Top Mobile Game Genres by Downloads | Powered by Sensor Tower Game Taxonomy

< Worldwide >



Rank	Genre	Downloads (B)	YoY Downloads	YoY IAP Revenue	Revenue % of All
#1	Simulation	9.8	+0.4%	+8.8%	20%
#2	Puzzle	9.7	-3.0%	+14.0%	20%
#3	Arcade	9.6	-12.5%	-22.6%	19%
#4	Lifestyle	4.0	-10.0%	+51.4%	8%
#5	Tabletop	2.6	-7.3%	+1.1%	5%
#6	Action	2.4	-7.9%	+46.0%	5%
#7	Shooter	2.4	+1.5%	+3.4%	5%
#8	Strategy	2.1	+14.5%	+16.2%	21.4%

Arcade Platformer and Simulation Subgenres Led Mobile Game Downloads in 2024

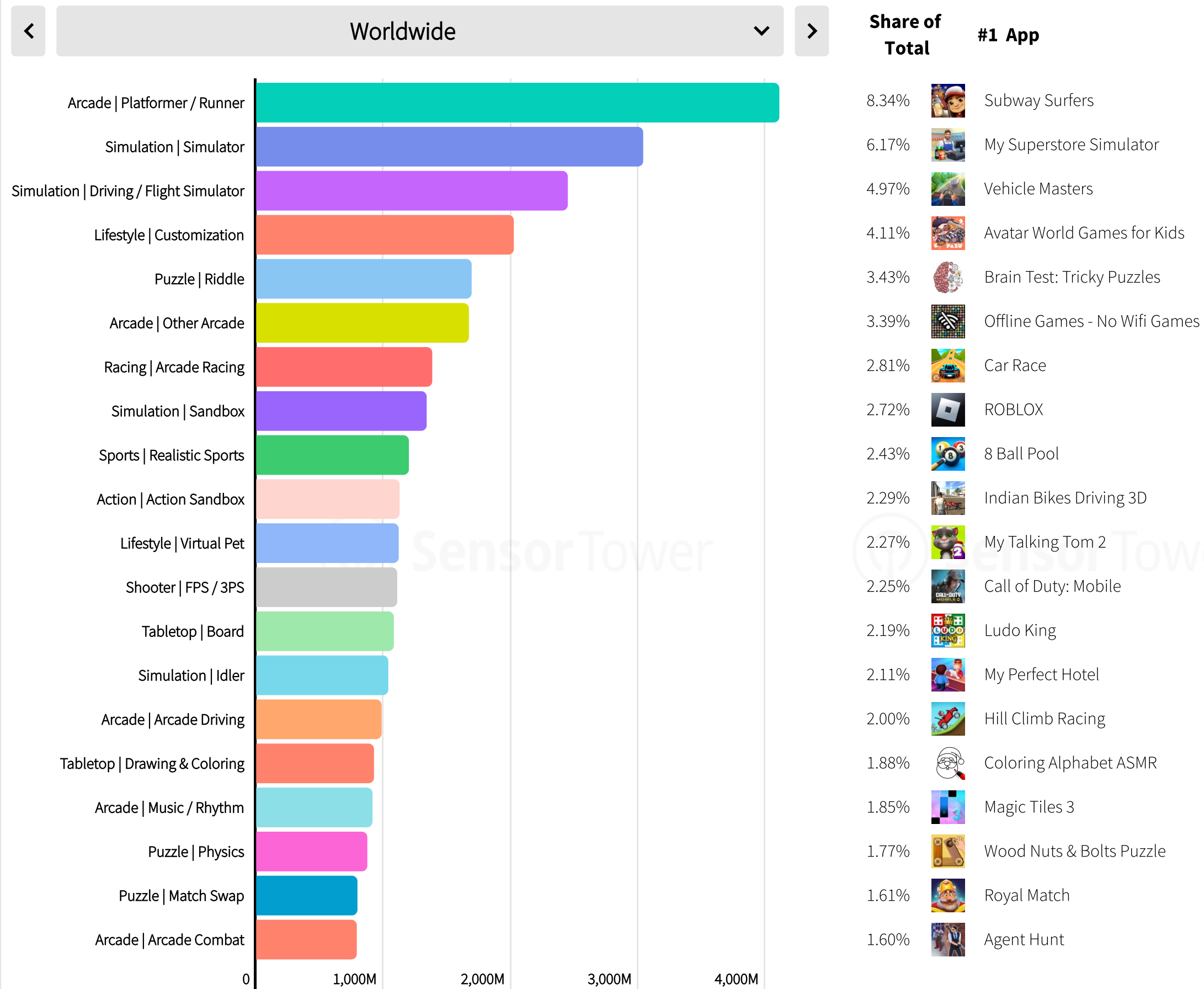
Arcade Platformer/Runner games led global mobile game downloads in 2024, capturing 8.34% of the share, driven by the enduring popularity of Subway Surfers. Simulation subgenres followed closely, with Simulator (6.17%) and Driving/Flight Simulator (4.98%) reflecting strong interest in immersive, task-based gameplay exemplified by My Supermarket Simulator 3D and Vehicle Masters.

Lifestyle Customization titles, led by Avatar World, gained traction, showcasing the growing appeal of personalization. Puzzle Riddle games, including Brain Test: Tricky Puzzles, maintained a steady 3.43% share. Meanwhile, Shooters such as Call of Duty: Mobile held competitive positions, underscoring sustained demand for action-packed experiences.

The diverse performance across genres highlights a balanced demand for casual and immersive games, offering developers opportunities to innovate and adapt to evolving global player preferences.

Source: Sensor Tower
 Note: iOS and Google Play combined. iOS only for China. Excludes third-party Android. Apps classified using Sensor Tower's Game taxonomy as of January 5, 2025.

Top 20 Global Game Subgenres by Downloads in 2024



Fewer New Games Among Top Rankings Highlight a Notable Shift Towards Core Genres

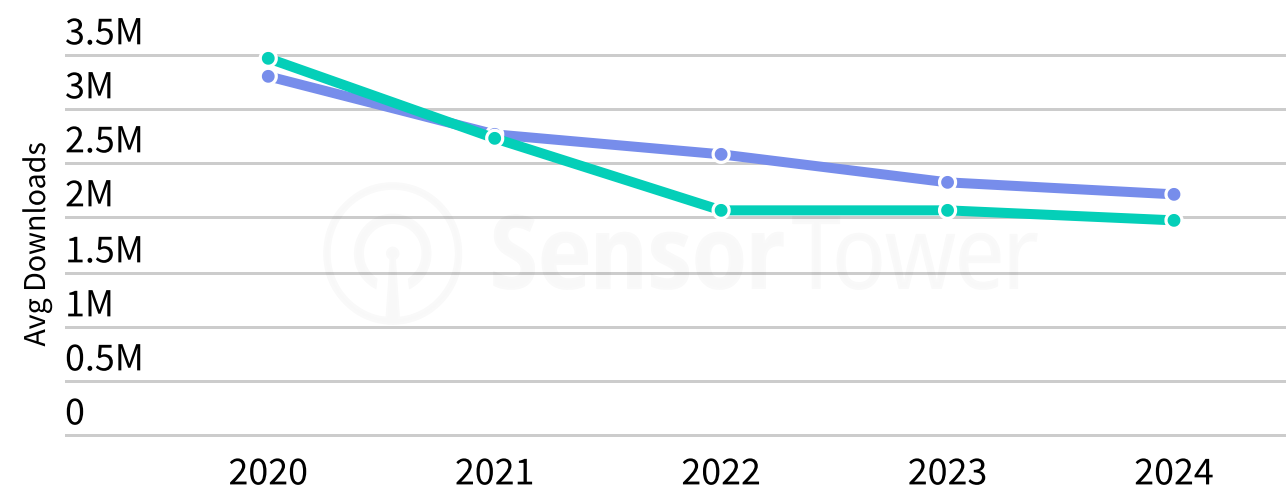
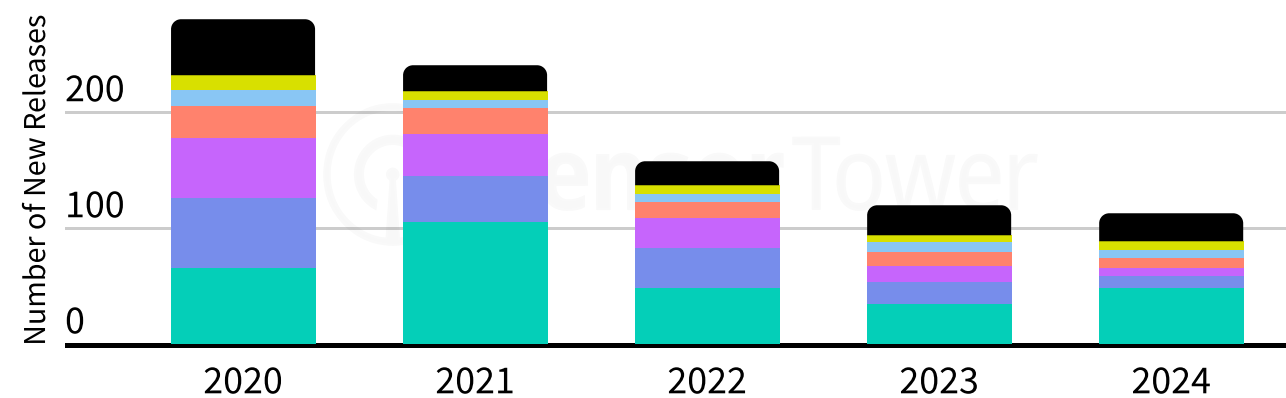
The number of new mobile game releases among the top 1,000 in the US has steadily declined since 2020, dropping from more than 200 to just above 100 in 2024. Despite this reduction, average downloads per game have remained stable at 1–2 million, highlighting a shift toward quality over quantity. Mid-core and core titles, including Shooters like Call of Duty: Warzone Mobile and MOBA newcomer Squad Busters, have seen strong adoption. Meanwhile, enduring hits such as Roblox and Subway Surfers continue to deliver significant download volumes. Additionally, Strategy and Lifestyle games are gaining momentum, creating new opportunities for innovation in niche categories.

Source: Sensor Tower Note: iOS and Google Play combined. iOS only for China. Excludes third-party Android. Apps classified using Sensor Tower's taxonomy as of January 5, 2025.

Number of New Games Released Per Year & Average Downloads Per Game Among Top 1,000 Games by Downloads

< United States >

- Puzzle
- Simulation
- Arcade
- Strategy
- Lifestyle
- Shooter
- Other



Top New Releases by Downloads

Rank	2020	2021	2022	2023	2024
1	Tangle Master 3D (Puzzle Sort)	Bridge Race (Racing Arcade Racing)	Fill The Fridge (Lifestyle Ultracausal)	MONOPOLY GO! (Casino Coin Looters)	Pokémon TCG Pocket (Strategy Card Battler)
2	Cube Surfer (Arcade Platformer / Runner)	Paper Fold (Puzzle Other Puzzle)	Tall Man Run (Arcade Platformer / Runner)	Burger Please (Simulation Idler)	Call of Duty: Warzone (Shooter Battle Royale)
3	Draw Climber (Racing Arcade Racing)	Count Masters (Arcade Platformer / Runner)	Apex Legends (Shooter Battle Royale)	Whiteout Survival (Strategy 4X Strategy)	Perfect Tidy (Lifestyle Ultracausal)
4	Spiral Roll (Arcade Platformer / Runner)	Hair Challenge (Arcade Platformer / Runner)	Crowd Evolution (Arcade Platformer / Runner)	Honkai: Star Rail (RPG Turn-based RPG)	Squad Busters (Strategy MOBA)
5	Scribble Rider (Racing Arcade Racing)	Crash Bandicoot: On the Run (Arcade Platformer / Runner)	Diablo Immortal (RPG MMORPG)	Twisted Tangle (Puzzle Sort)	Screw Puzzle: Wood Nut & Bolt (Puzzle Physics)

Top Past Releases by Downloads

1	Among Us! (Arcade Social Party)	ROBLOX (Simulation Sandbox)	ROBLOX (Simulation Sandbox)	ROBLOX (Simulation Sandbox)	Block Blast Adventure Master (Puzzle Block)
2	ROBLOX (Simulation Sandbox)	Project Makeover (Puzzle Match Swap)	Subway Surfers (Arcade Platformer / Runner)	Royal Match (Puzzle Match Swap)	ROBLOX (Simulation Sandbox)
3	Call of Duty: Mobile (Shooter FPS / 3PS)	Among Us! (Arcade Social Party)	Wordle by Goldfinch Studios (Puzzle Word)	Subway Surfers (Arcade Platformer / Runner)	MONOPOLY GO! (Casino Coin Looters)

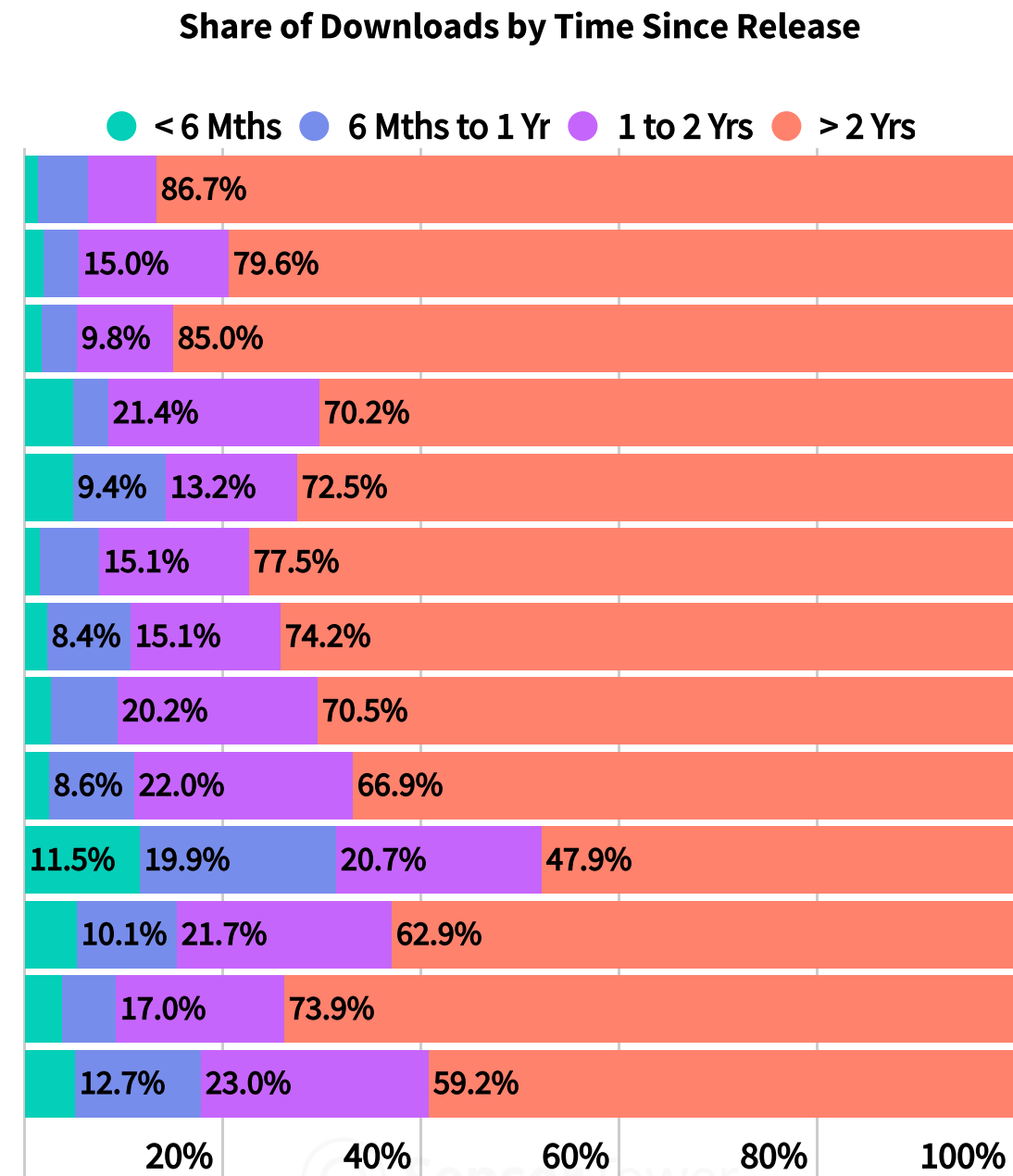
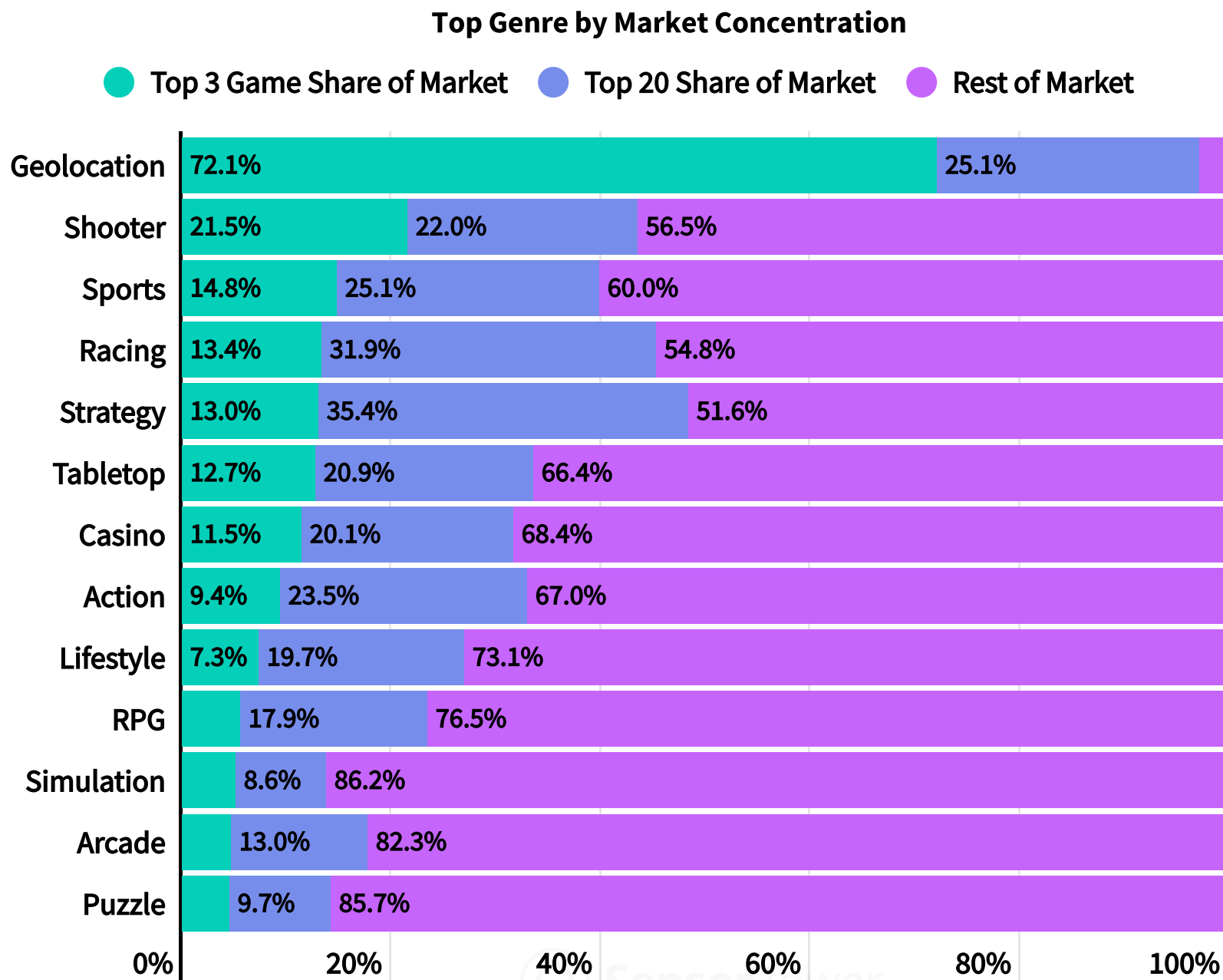


Geolocation Shows Highest Market Concentration While Sports and Arcade Lead in Longevity

In 2024, Geolocation games exhibited the highest market concentration, with the top three titles accounting for 72.1% of downloads, significantly outpacing Shooter (21.5%) and Sports (14.8%), which faced broader competition. Meanwhile, Simulation, Arcade, and Puzzle genres remained highly fragmented, with more than 80% of downloads distributed across smaller games. Geolocation and Sports genres also leaned heavily on older titles. In contrast, RPG games saw less than 50% of downloads driven by older titles, highlighting the competitive momentum and appeal of newer releases.

2024 | Top Genre Per Market Concentration by Downloads

< Worldwide >



Top 3 Games

Source: Sensor TowerNote: iOS and Google Play combined. iOS only for China. Excludes third-party Android. Apps classified using Sensor Tower's taxonomy as of January 5, 2025.

Strategy and RPG Lead Global Consumer Spend in 2024

In 2024, Strategy games topped global consumer spending with \$17.5 billion, closely followed by RPGs at \$16.8 billion. Puzzle and Casino genres secured third and fourth positions, contributing \$12.2 billion and \$11.7 billion, respectively, with Puzzle games showcasing robust monetization despite declining downloads. Action, Simulation, and Shooter genres recorded significant growth, with Action leading the way in revenue gains (+46%). Sports games, though facing a drop in downloads, still generated \$2.7 billion. These trends underline the strong monetization potential of competitive and immersive genres such as Strategy, RPG, and Action, which continue to captivate players globally.

Source: Sensor Tower. 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 Game taxonomy as of January 5, 2025.

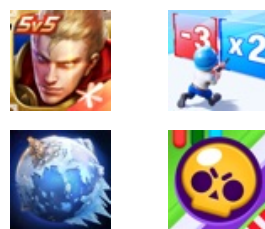
2024 | Worldwide Top Mobile Game Genres by IAP Revenue | Powered by Sensor Tower Game Taxonomy

< Worldwide >



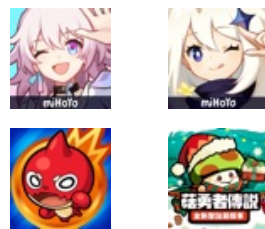
#1 - Strategy

\$17.5 B in IAP Revenue
 YoY IAP Revenue +16.2%
 YoY Downloads +14.5%
 21.4% of All IAP Revenue
 4% of All Downloads



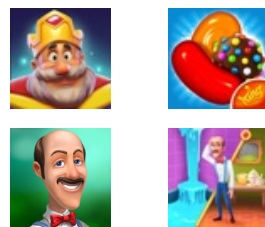
#2 - RPG

\$16.8 B in IAP Revenue
 YoY IAP Revenue -17.3%
 YoY Downloads -6.1%
 20.5% of All IAP Revenue
 3% of All Downloads



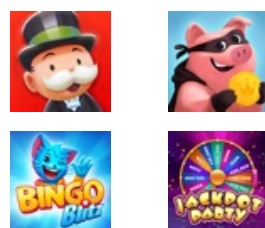
#3 - Puzzle

\$12.2 B in IAP Revenue
 YoY IAP Revenue +14.0%
 YoY Downloads -3.0%
 14.9% of All IAP Revenue
 20% of All Downloads



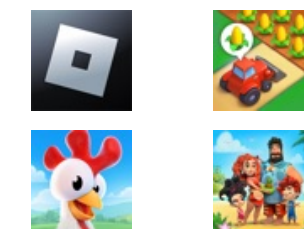
#4 - Casino

\$11.7 B in IAP Revenue
 YoY IAP Revenue +8.9%
 YoY Downloads -39.6%
 14.3% of All IAP Revenue
 2% of All Downloads



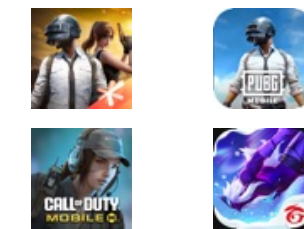
#5 - Simulation

\$6.1 B in IAP Revenue
 YoY IAP Revenue +8.8%
 YoY Downloads +0.4%
 7.4% of All IAP Revenue
 20% of All Downloads



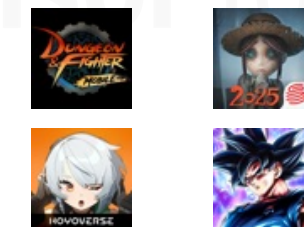
#6 - Shooter

\$4.3 B in IAP Revenue
 YoY IAP Revenue +3.4%
 YoY Downloads +1.5%
 5.3% of All IAP Revenue
 5% of All Downloads



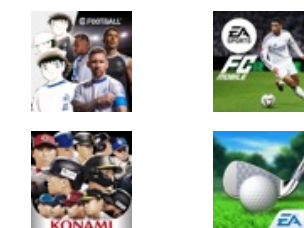
#7 - Action

\$3.6 B in IAP Revenue
 YoY IAP Revenue +46.0%
 YoY Downloads -7.9%
 4.4% of All IAP Revenue
 5% of All Downloads



#8 - Sports

\$2.7 B in IAP Revenue
 YoY IAP Revenue -6.3%
 YoY Downloads -10.6%
 3.4% of All IAP Revenue
 4% of All Downloads



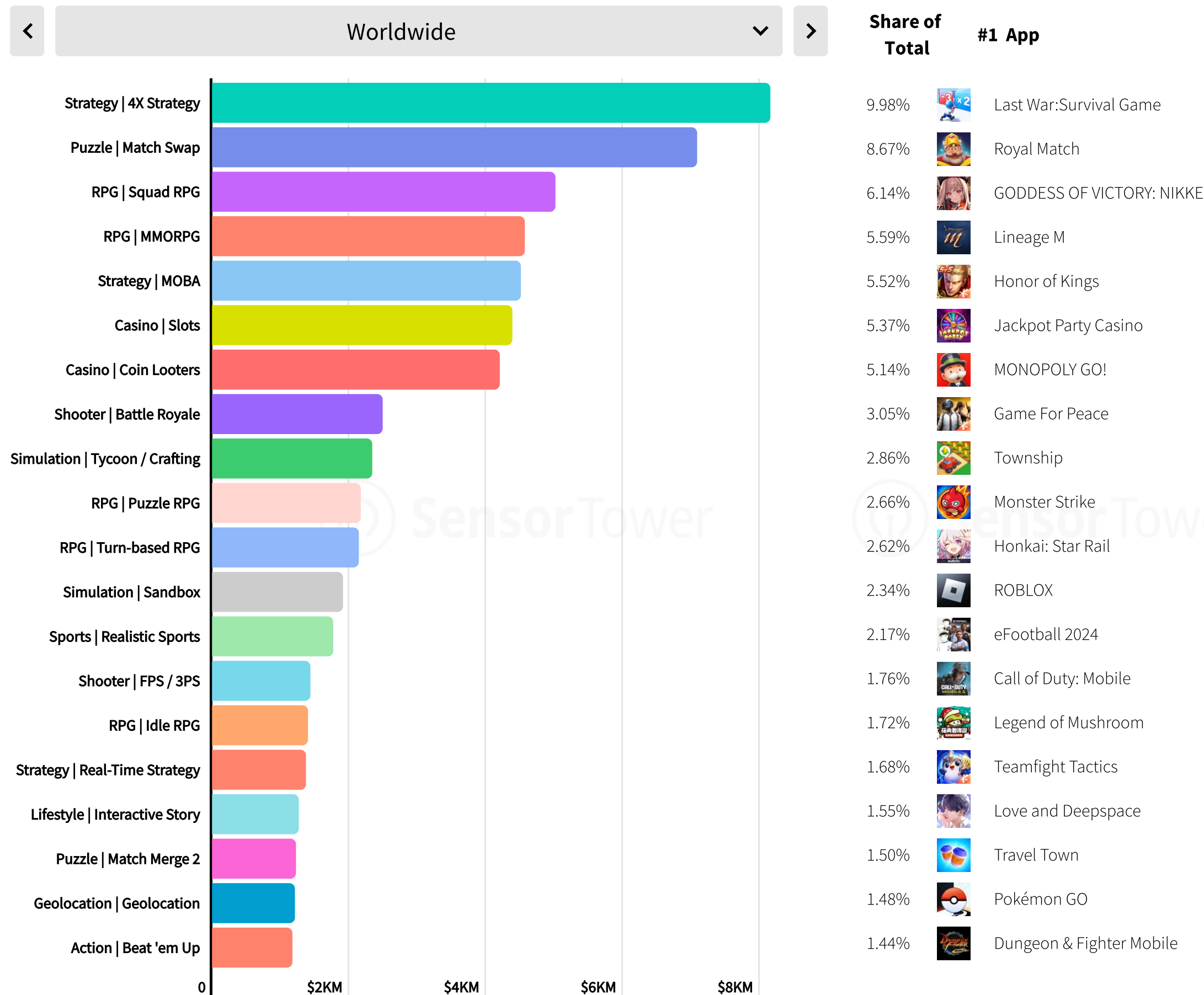
4X Strategy Games Top IAP Revenue in 2024, with Puzzle and RPG Subgenres Following Close

In 2024, Strategy games dominated global consumer spend, with 4X Strategy leading the charge, capturing just under 10% of the market share, driven by Last War: Survival. Match Swap Puzzle games followed closely at 8.67%, fueled by the success of titles like Royal Match. RPG subgenres, including Squad RPGs (6.14%) and MMORPGs (5.59%), continued to deliver strong contributions, showcasing their lasting appeal among dedicated players.

Casino Slots (5.37%) and Coin Looters (5.14%) demonstrated robust monetization, while Battle Royale games, led by Game for Peace (3.05%), maintained a loyal player base. Simulation subgenres, particularly Tycoon/Crafting, also gained momentum. These trends highlight the dominance of immersive and strategy-focused genres, with a balance of enduring favorites and new entrants driving sustained growth in the market.

Source: Sensor Tower.
 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 Game taxonomy as of January 5, 2025.

Top 20 Global Game Subgenres by IAP Revenue in 2024



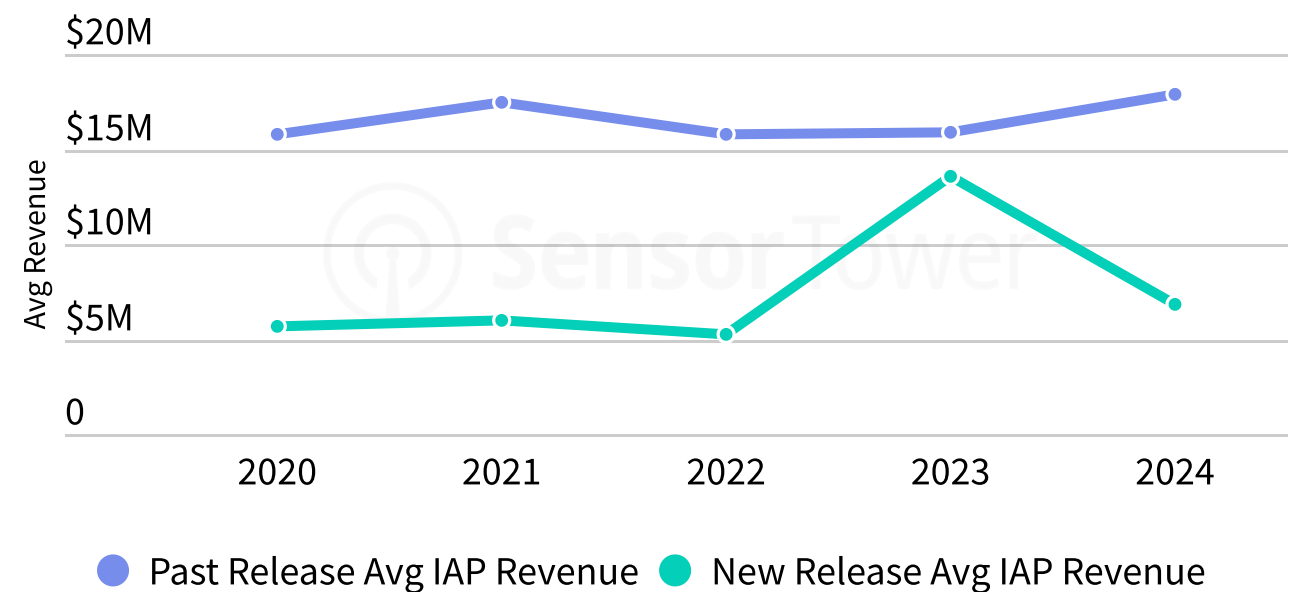
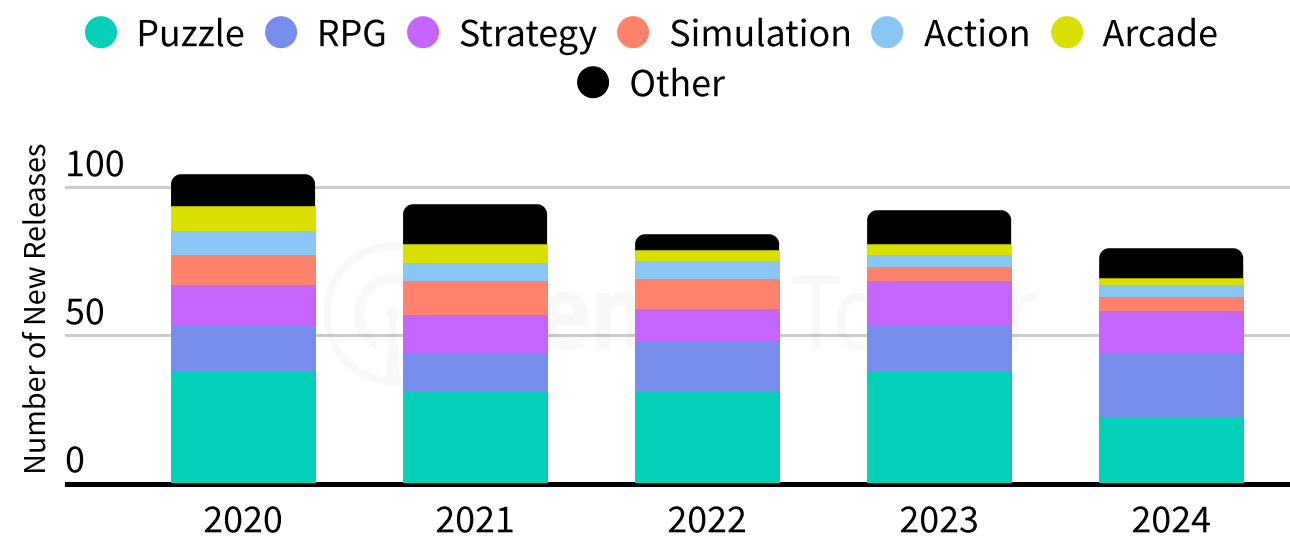
Stable New Releases in the US Highlight Strong Performance in RPG and Strategy Genres

In the United States, the number of new mobile games among the top 1,000 by revenue remained stable, with RPG and Strategy genres leading the charge. New hits like Pokémon TCG Pocket and Sea of Conquest drove notable consumer spend, while RPGs such as AFK Journey and Top Heroes delivered strong and consistent revenues. Meanwhile, established Puzzle games like Royal Match and Candy Crush Saga continued to excel in monetization, showcasing their lasting appeal and ability to engage loyal players. The rising average consumer spend per game in 2023 highlights the growing success of high-quality new releases, supported by enduring hits like MONOPOLY GO! and Whiteout Survival, which sustained strong engagement and revenue growth throughout the year.

Source: Sensor Tower. 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 Game taxonomy as of January 5, 2025.

Number of New Games Released Per Year & Average Revenue Per Game Among Top 1,000 Games by IAP Revenue

< United States >



Top New Releases by IAP Revenue

Year	Rank	Game Title (Genre)
2020	1	The Seven Deadly Sins: Hikari to Yami no Grand Cross (RPG Squad RPG)
	2	Genshin Impact (RPG Open World Adventure)
	3	MLB Tap Sports Baseball 2020 (Sports Realistic Sports)
	4	Redecor (Lifestyle Customization)
	5	Arknights (Strategy Tower Defense)
2021	1	Royal Match (Puzzle Match Swap)
	2	Cookie Run: Kingdom (RPG Squad RPG)
	3	MLB Tap Sports Baseball 2021 (Sports Realistic Sports)
	4	My Hero Academia: Strongest Hero (RPG Action RPG)
	5	Family Farm Adventure (Simulation Tycoon / Crafting)
2022	1	Diablo Immortal (RPG MMORPG)
	2	Dislyte (RPG Squad RPG)
	3	Survivor!.io (Action Shoot 'em Up)
	4	GODDESS OF VICTORY: NIKKE (RPG Squad RPG)
	5	MLB Tap Sports Baseball 2022 (Sports Realistic Sports)
2023	1	MONOPOLY GO! (Casino Coin Looters)
	2	Whiteout Survival (Strategy 4X Strategy)
	3	Honkai: Star Rail (RPG Turn-based RPG)
	4	Call of Dragons (Strategy 4X Strategy)
	5	Street Fighter: Duel (RPG Squad RPG)
2024	1	Pokémon TCG Pocket (Strategy Card Battler)
	2	AFK Journey (RPG Squad RPG)
	3	Sea of Conquest (Strategy Other Strategy)
	4	Top Heroes (RPG Squad RPG)
	5	Love and Deepspace (Lifestyle Interactive Story)

Top Past Releases by Revenue

Year	Rank	Game Title (Genre)
2020	1	ROBLOX (Simulation Sandbox)
	2	Candy Crush Saga (Puzzle Match Swap)
	3	Coin Master (Casino Coin Looters)
2021	1	ROBLOX (Simulation Sandbox)
	2	Candy Crush Saga (Puzzle Match Swap)
	3	Coin Master (Casino Coin Looters)
2022	1	Candy Crush Saga (Puzzle Match Swap)
	2	ROBLOX (Simulation Sandbox)
	3	Coin Master (Casino Coin Looters)
2023	1	Candy Crush Saga (Puzzle Match Swap)
	2	Royal Match (Puzzle Match Swap)
	3	ROBLOX (Simulation Sandbox)
2024	1	MONOPOLY GO! (Casino Coin Looters)
	2	Royal Match (Puzzle Match Swap)
	3	ROBLOX (Simulation Sandbox)

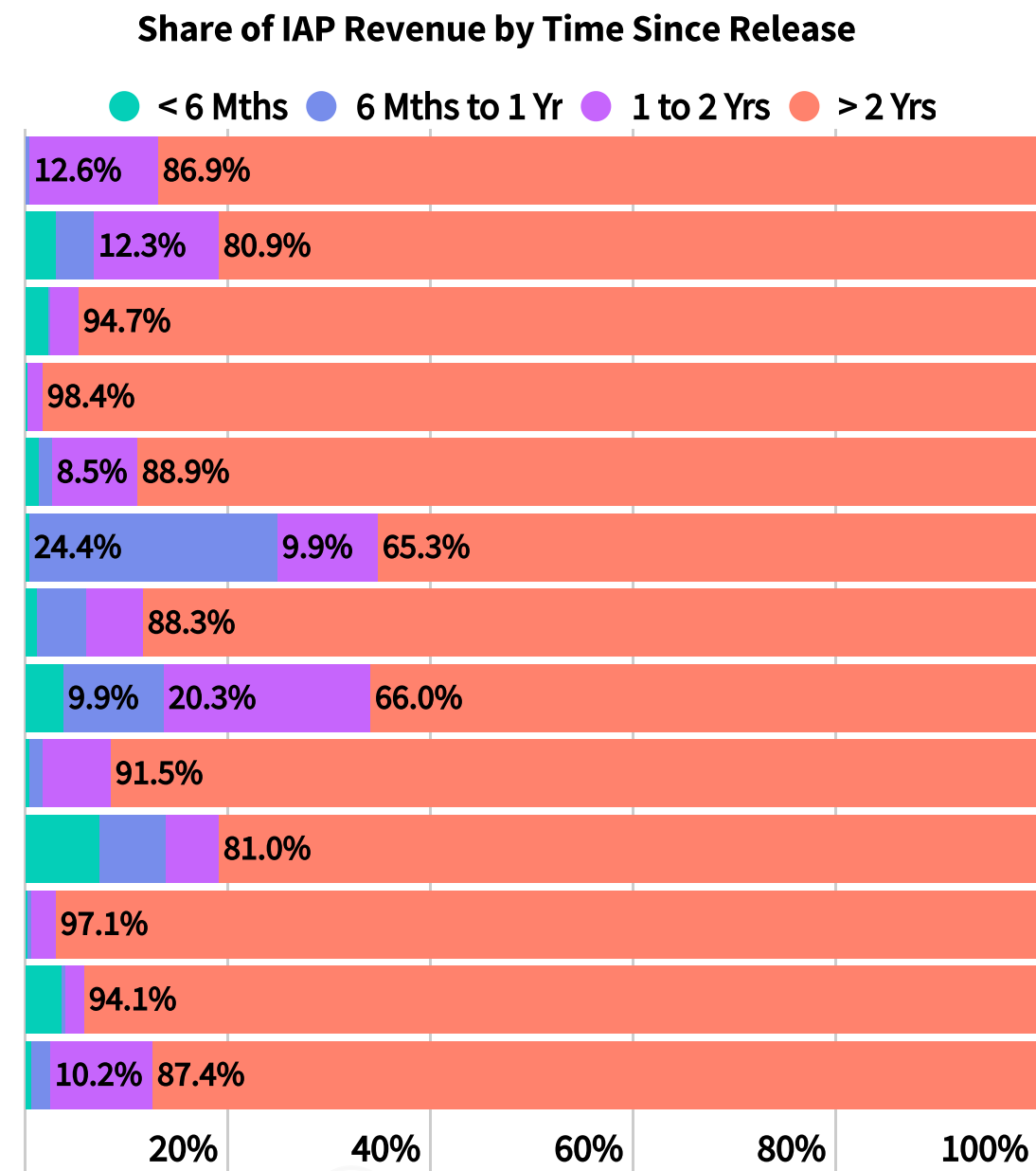
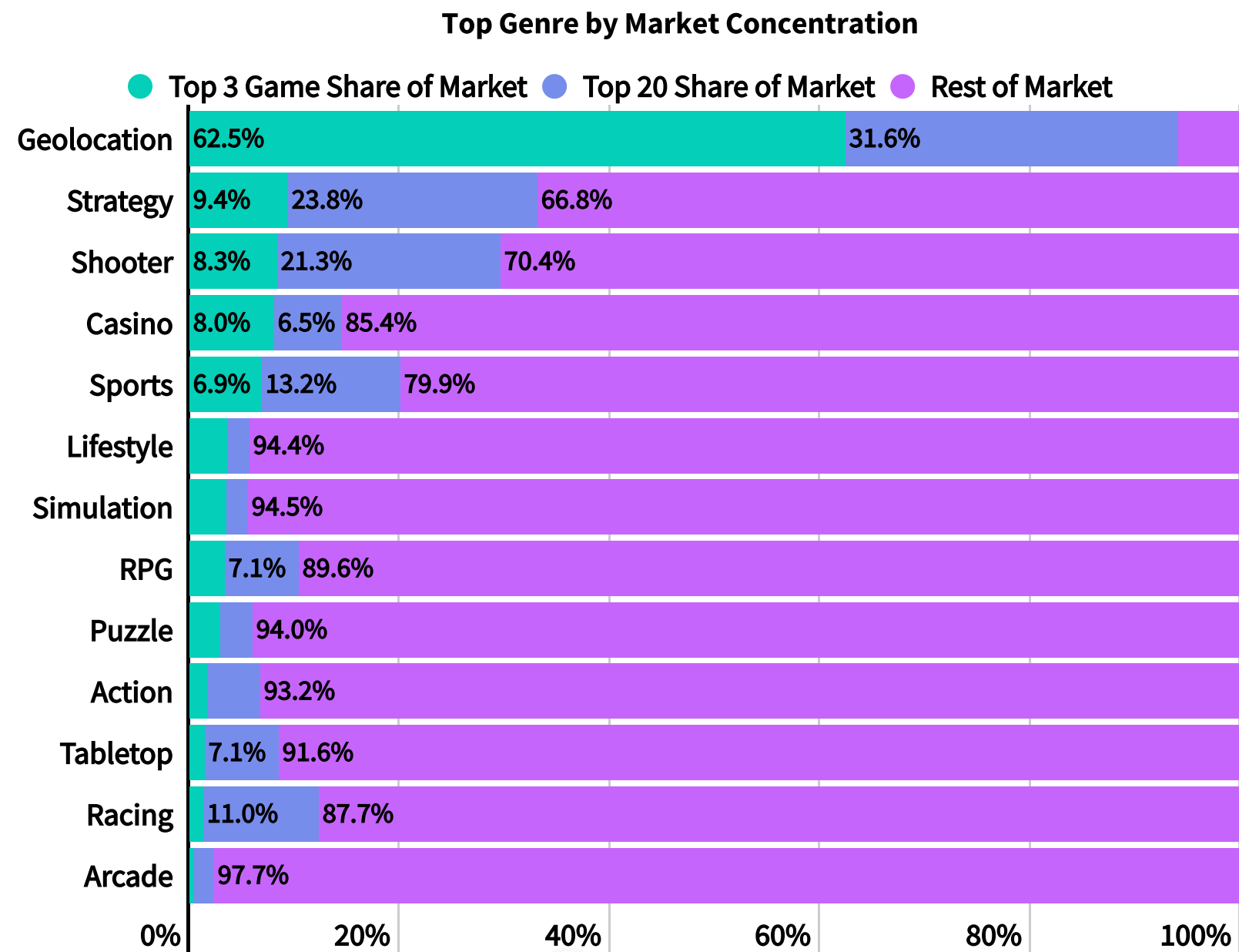


Geolocation Stands Out as the Most Concentrated Genre, While Older Games Continue to Drive Revenue

In 2024, Geolocation games led market concentration, with the top three titles accounting for 62.5% of consumer spend. Strategy (9.4%) and Shooter (8.3%) followed but were more diversified, while genres like Simulation, Lifestyle, and Arcade saw 94–8% of spend distributed across smaller titles. Older games contributed over 80% of consumer spend in most genres. RPG and Lifestyle games demonstrated more balance, with mid-term releases playing a larger role, signaling growth opportunities in less concentrated markets.

2024 | Top Genre Per Market Concentration by IAP Revenue

< Worldwide >



Top 3 Games

Source: Sensor Tower
 Note: iOS and Google Play combined. iOS only for China. Excludes third-party Android. Apps classified using Sensor Tower's game taxonomy as of January 5, 2025.

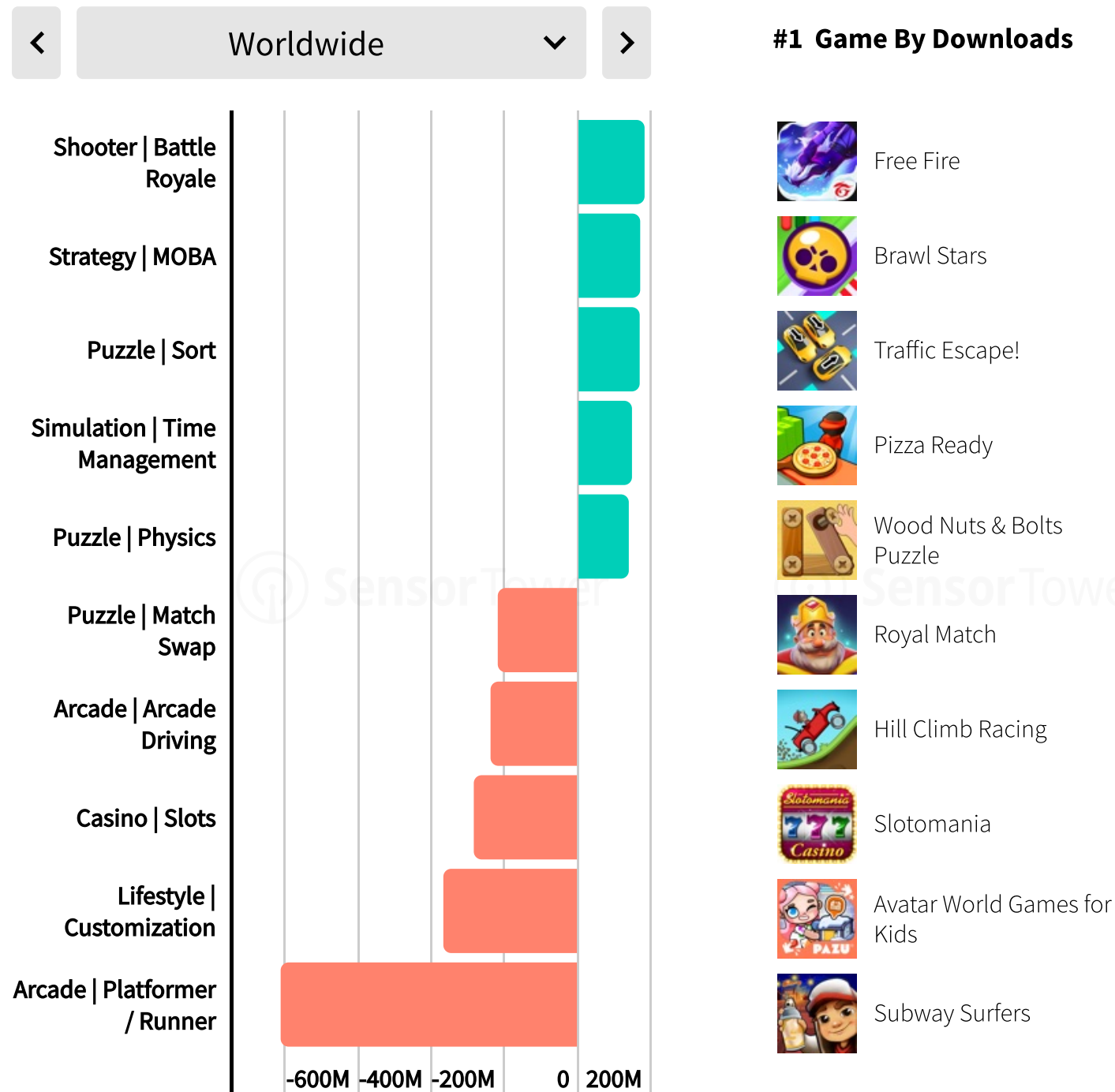
Shooters and Strategy Dominate Download Growth While Casino Tops IAP Revenue Growth

In 2024, Shooter and Strategy subgenres led download growth, driven by hits like Garena Free Fire and Brawl Stars. Simulation games also grew, while Arcade and Lifestyle saw declines. Casino games topped revenue growth, with Action and Strategy also showing strong monetization. RPG subgenres declined, reflecting shifting player spending habits and highlighting opportunities in competitive and casual genres.

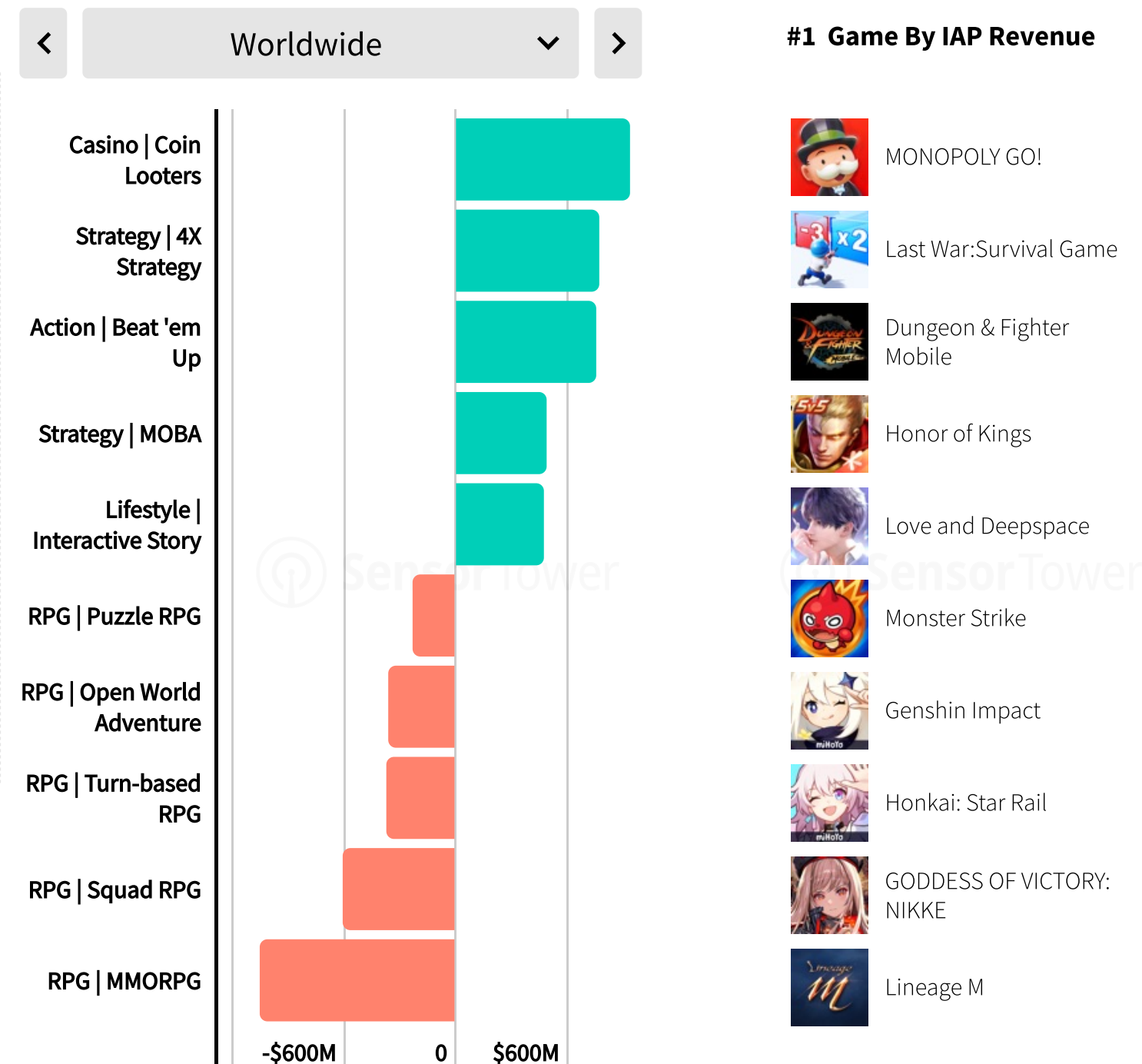
Source: Sensor Tower.
 Note: iOS and Google Play combined. iOS only for China. Revenue is gross — inclusive of any percent taken by the app stores. Apps classified using Sensor Tower's Game taxonomy as of January 5, 2025.

Top Breakout Gaming Subgenres: 2024 vs 2023

YoY Download Growth (Millions)



YoY IAP Revenue Growth (Millions)



Shooters and Strategy Subgenres Lead Global Time Spent in 2024

In 2024, Shooter (Battle Royale) and Strategy (MOBA) subgenres dominated global time spent, led by Garena Free Fire and Brawl Stars. These genres captured significant player engagement, reflecting their strong competitive and multiplayer appeal. Simulation Sandbox games, with Roblox as the top title, also maintained high levels of player investment.

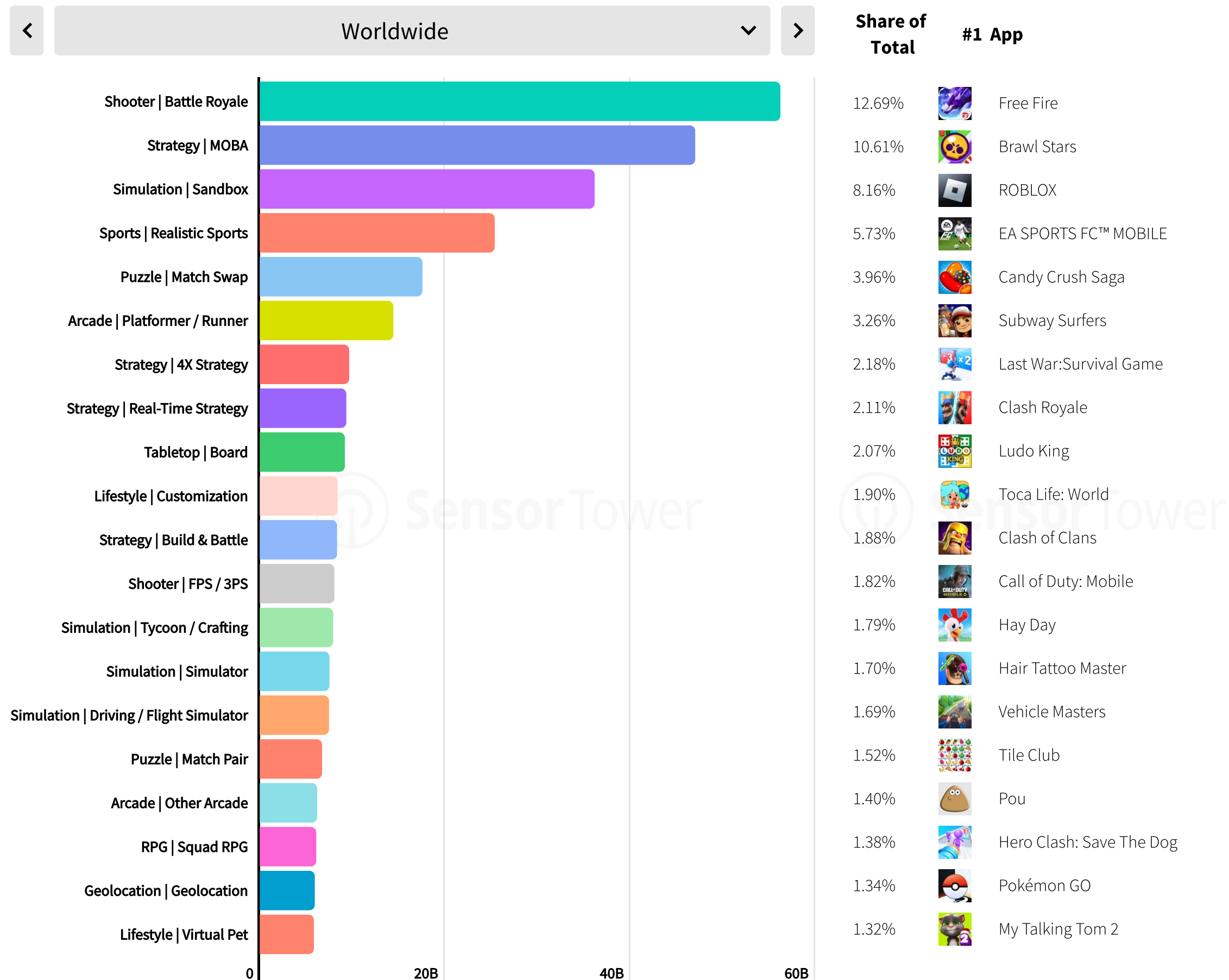
Casual and task-based genres like Puzzle (Match Swap) and Sports (Realistic Sports) continued to attract steady time spent, driven by Candy Crush Saga and EA SPORTS FC™ Mobile Soccer. Meanwhile, subgenres such as Arcade (Platformer/Runner) and Lifestyle (Customization) retained moderate engagement, showing the enduring popularity of familiar, easy-to-play formats. This highlights how competitive, immersive games dominate time spent, while casual titles sustain consistent, loyal audiences.

Navigate Macroeconomic Headwinds:

Be the first to spot potential breakout apps in your sector with detailed genres and subgenres from Sensor Tower's Gaming Insights.

Source: Sensor Tower
 Note: iOS and Google Play combined. Apps classified using Sensor Tower's game taxonomy as of January 5, 2025.

Top 20 Global Game Subgenres by Time Spent in 2024



2024 Rankings by Market | Games



AMER - Downloads

	Worldwide	United States	Canada	Mexico	Brazil	Argentina
1	Free Fire (Shooter Battle Royale)	Block Blast Adventure Master (Puzzle Block)	Block Blast Adventure Master (Puzzle Block)	ROBLOX (Simulation Sandbox)	ROBLOX (Simulation Sandbox)	ROBLOX (Simulation Sandbox)
2	ROBLOX (Simulation Sandbox)	ROBLOX (Simulation Sandbox)	ROBLOX (Simulation Sandbox)	Free Fire (Shooter Battle Royale)	Free Fire (Shooter Battle Royale)	Free Fire (Shooter Battle Royale)
3	Block Blast Adventure Master (Puzzle Block)	MONOPOLY GO! (Casino Coin Looters)	MONOPOLY GO! (Casino Coin Looters)	Pizza Ready (Simulation Time Management)	Subway Surfers (Arcade Platformer / Runner)	Offline Games - No Wifi Games (Arcade Other Arcade)
4	Subway Surfers (Arcade Platformer / Runner)	Township (Simulation Tycoon / Crafting)	Offline Games - No Wifi Games (Arcade Other Arcade)	Subway Surfers (Arcade Platformer / Runner)	Stumble Guys (Arcade Platformer / Runner)	Pizza Ready (Simulation Time Management)
5	Ludo King (Tabletop Board)	Last War: Survival Game (Strategy 4X Strategy)	Brawl Stars (Strategy MOBA)	2 3 4 Player Mini Games (Arcade Other Arcade)	Moto Wheelie 3D (Simulation Driving / Flight Simulator)	Block Blast Adventure Master (Puzzle Block)

Download data

Source: Sensor Tower
 Note: iOS and Google Play combined. iOS only for China. Apps classified using Sensor Tower's game taxonomy as of January 5, 2025.

04

Finance

Finance apps bounce back as global economic conditions improve. Digital Wallet & P2P Payments and Consumer Banking had a strong year, and Cryptocurrency surged again.



Consumers Continued to Flock to Finance Apps as a Convenient Option

Global Finance app downloads exceeded 7 billion in 2024, up 8% YoY. This was an acceleration from the already strong growth in recent years as consumers continue to find mobile alternatives for their finance needs, from banking to payments to crypto. The genre has also maintained double-digit YoY growth for time spent, indicating that consumers are also relying on these apps more than ever before.

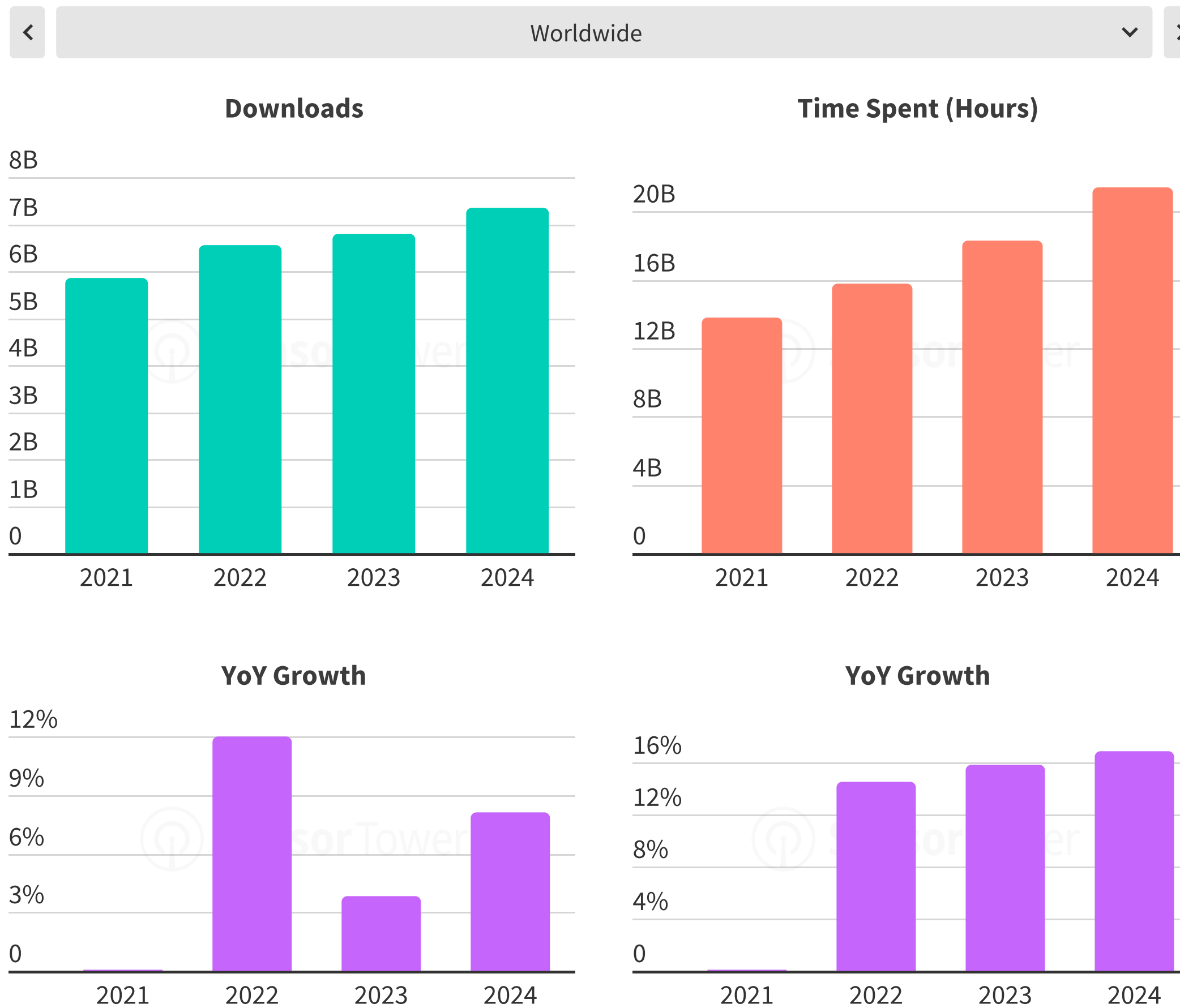
In the United States, downloads and time spent in Finance apps declined in 2022 as consumers became more comfortable with in-person interactions following the pandemic (though it's worth noting downloads were still well above pre-pandemic levels even if below their pandemic peak). Positive growth returned in 2024, highlighting the potential for mobile options even post-pandemic.

Find More Finance Insights

Want more insights? Download our [State of Mobile Finance Apps 2024 report](#) to see the latest in cryptocurrency, advertising, and more.

Source: Sensor Tower
 Note: iOS and Google Play combined. iOS only for China..Finance apps classified using Sensor Tower's taxonomy as of January 5, 2025.

Yearly Trends for Finance Apps



Payment and Banking Apps Led the Finance Genre While Cryptocurrency Soared

The top two Finance subgenres (Digital Wallet & P2P Payments and Consumer Banking) both had a strong year for worldwide downloads, climbing 10% and 3% YoY, respectively. Meanwhile, Cryptocurrency apps saw a resurgence in 2024 with app downloads slightly above the previous peak from 2021.

The ceiling for downloads is highest for Digital Wallet & P2P Payment apps, with seven of these apps among the top 10 by global downloads in 2024. And these apps may be incentivized to become even more global — a [Sensor Tower analysis](#) revealed that P2P apps specializing in international transfers are outperforming domestic P2P apps in the US.

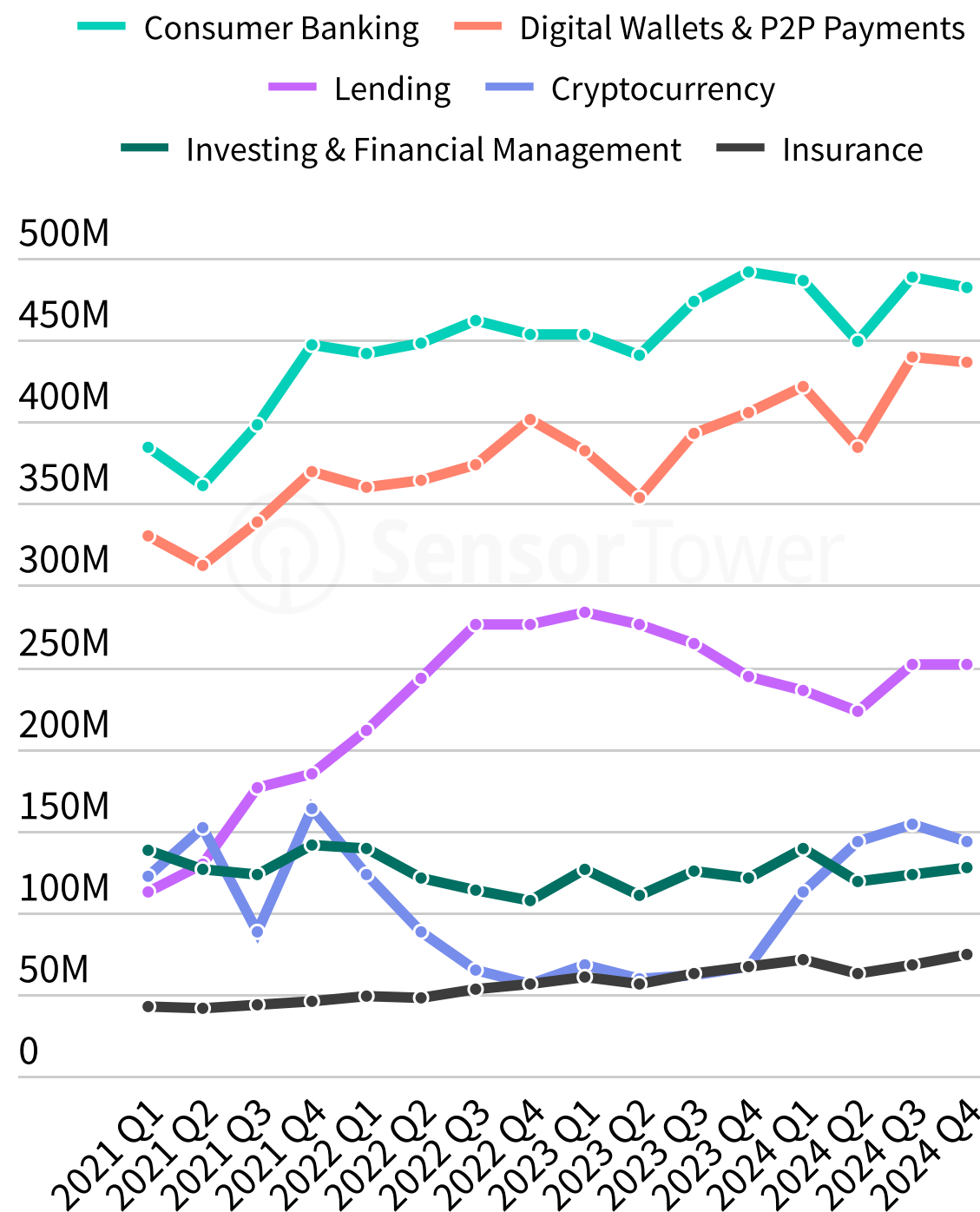
Cryptocurrency apps can also have global appeal, with [Binance](#) and [Tonkeeper](#) ranking among the top 10. Consumer Banking tends to be more regional. Consumer Banking apps topped the download charts in several markets including Australia, Brazil, and Turkey.

Source: Sensor Tower
 Note: iOS and Google Play combined. iOS only for China..Finance apps classified using Sensor Tower's taxonomy as of January 5, 2025.

Finance Download Trends by Subgenre

< Worldwide >

Quarterly Downloads by Subgenre



Top Apps by Downloads in 2024

Rank	App	Subgenre
1	PhonePe	Digital Wallets & P2P Payments
2	Google Pay	Digital Wallets & P2P Payments
3	PayPal	Digital Wallets & P2P Payments
4	Paytm	Digital Wallets & P2P Payments
5	DANA	Digital Wallets & P2P Payments
6	Binance	Cryptocurrency
7	Nubank	Consumer Banking
8	ShopeePay	Digital Wallets & P2P Payments
9	Tonkeeper	Cryptocurrency
10	Bajaj Finserv	Lending



Cryptocurrency App Usage on the Rise in 2024

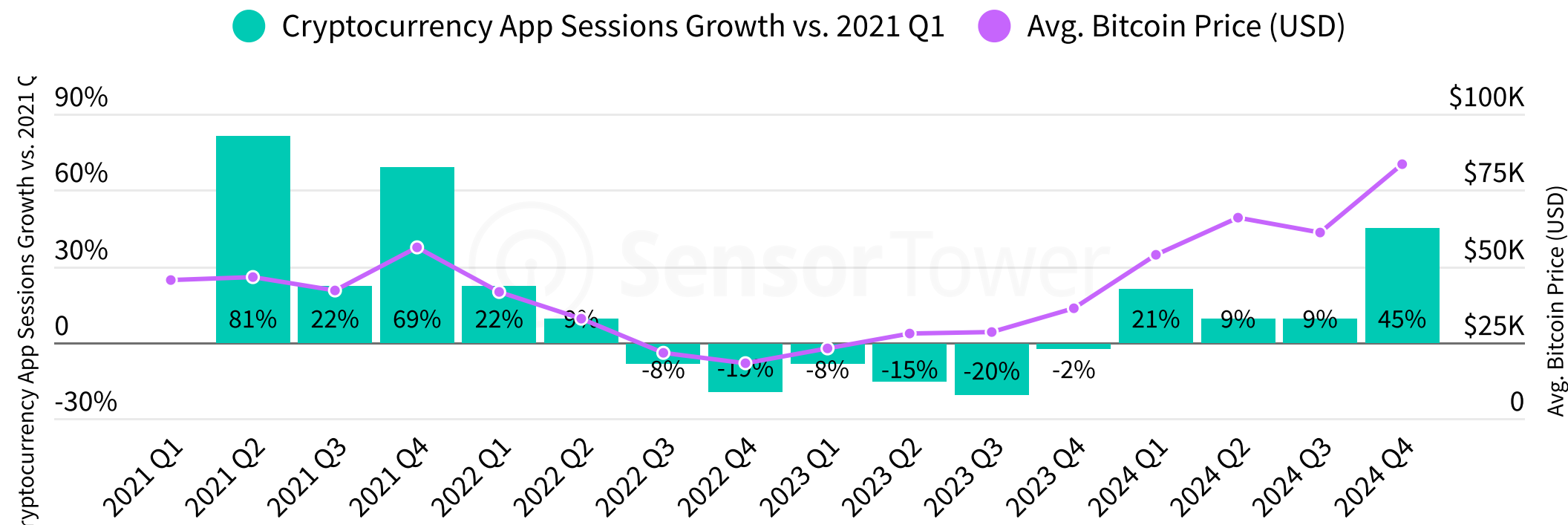
The cryptocurrency market is recovering from the downturn caused by the FTX collapse. As inflation eases and the global economy expands, investor confidence is returning, leading to increased engagement in the cryptocurrency ecosystem. According to Sensor Tower data, the global total session count for cryptocurrency apps increased by 37% YoY in 2024. This upward trend has been consistent, with positive YoY growth in each quarter throughout the year, showing a strong correlation with Bitcoin's price.

In 2024, Germany stood out as the fastest-growing market for cryptocurrency app usage, with a 91% YoY growth in total sessions. This was followed by significant increases in Indonesia (54%), Brazil (47%), and France (47%), reflecting a broad global uptick in cryptocurrency engagement.

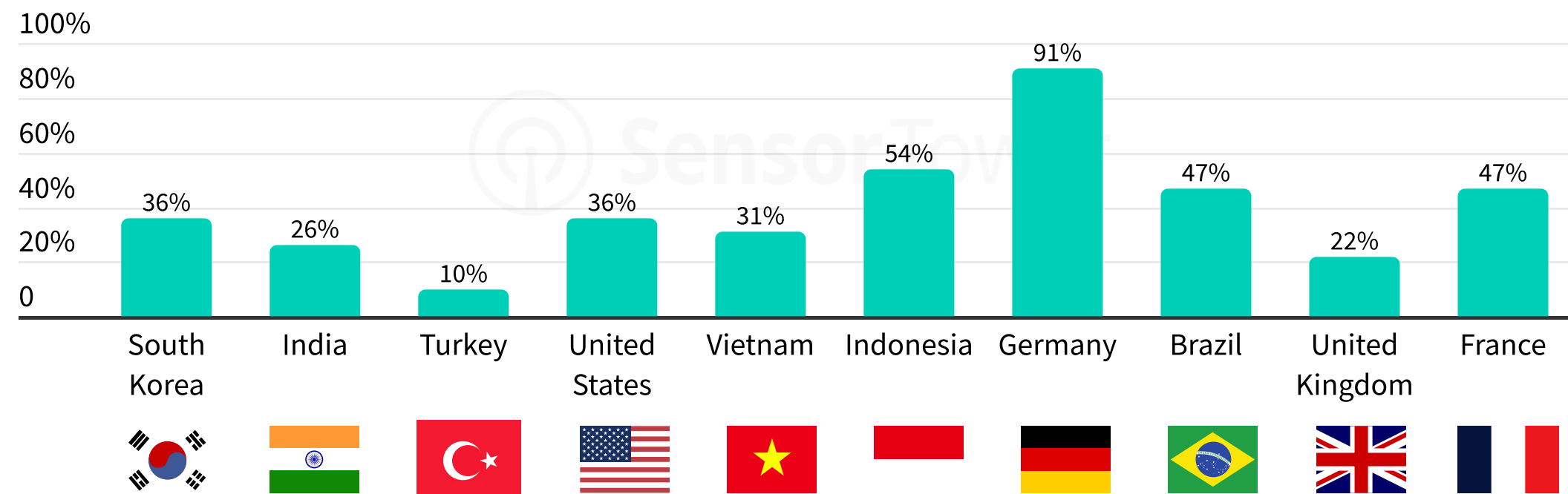
Find the Latest Trends on Our Blog
 Feel free to check our blog for regular updates in the Finance app market, such as [this detailed look at crypto apps from 2024](#).

Source: Sensor Tower
 Note: iOS and Google Play combined. iOS only for China..Cryptocurrency apps classified using Sensor Tower's taxonomy as of January 5, 2025. Bitcoin price data in this report is from [Investing.com](#).

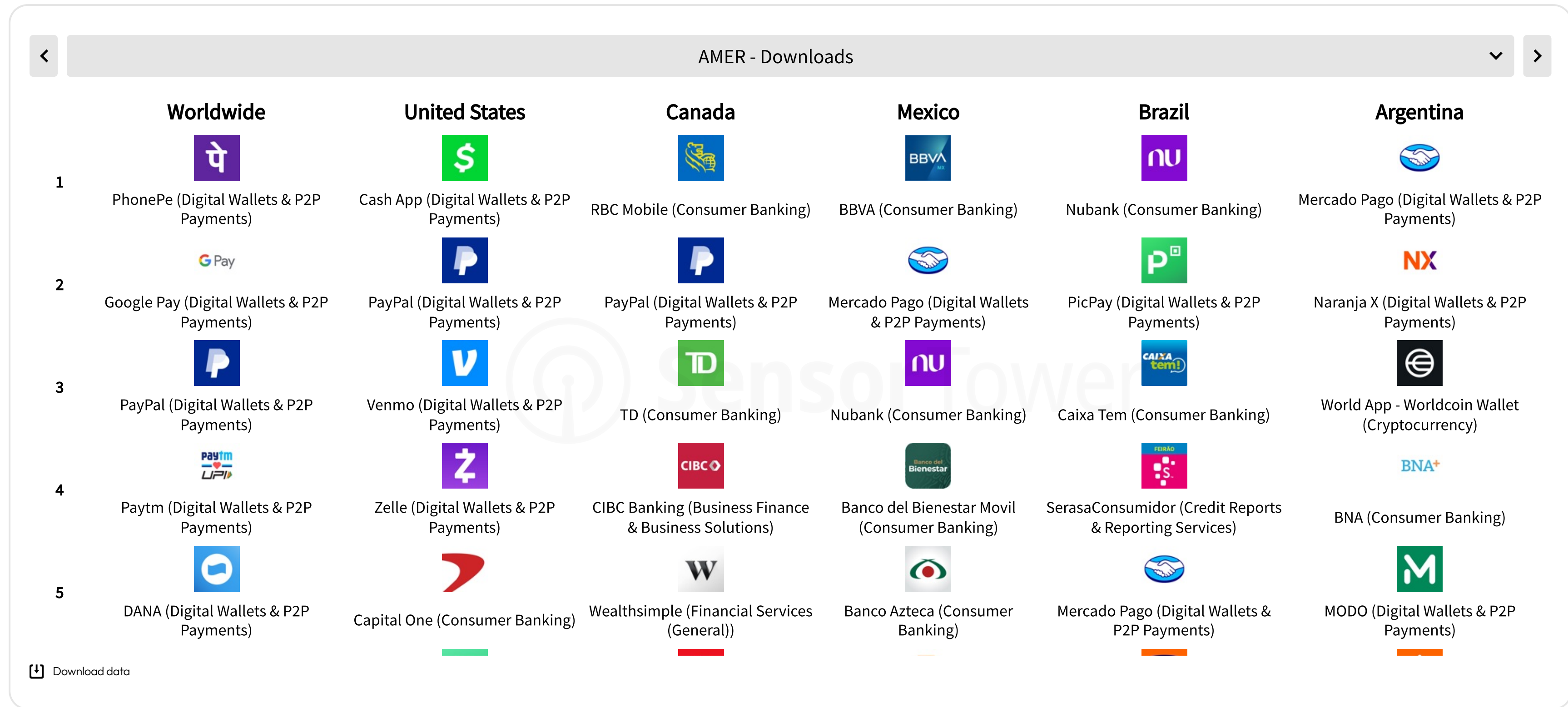
Indexed Cryptocurrency App Sessions vs. Average Quarterly Bitcoin Price



Year-over-Year Cryptocurrency App Sessions Growth in 2024 Among the Top 10 Markets by Cryptocurrency App Sessions



2024 Rankings by Market | Finance



Source: Sensor Tower
 Note: iOS and Google Play combined. iOS only for China. Apps classified using Sensor Tower's taxonomy as of January 5, 2025.

05

Retail

Some of the biggest shopping app markets have become saturated with rising competition from Chinese e-tailers like Temu and SHEIN. As a result, retail apps are going global: top apps look to expand to new regions.

“

After using Sensor Tower to conduct a comprehensive analysis of competitors' promotional content, we developed specialized campaigns tailored to sports seasons, holiday themes, and local styles during Q2 and Q3. This allowed us to successfully plan the back-to-school season, the European Cup, and hot sales in Mexico by aligning with local trends. Throughout this process, our visual and copywriting solutions became more refined and localized than ever before, gaining favor from both Google and Apple platforms. This approach not only secured free exposure during major promotion seasons but also significantly enhanced market visibility.



Jin Liang
User Growth Product Team Leader
AliExpress

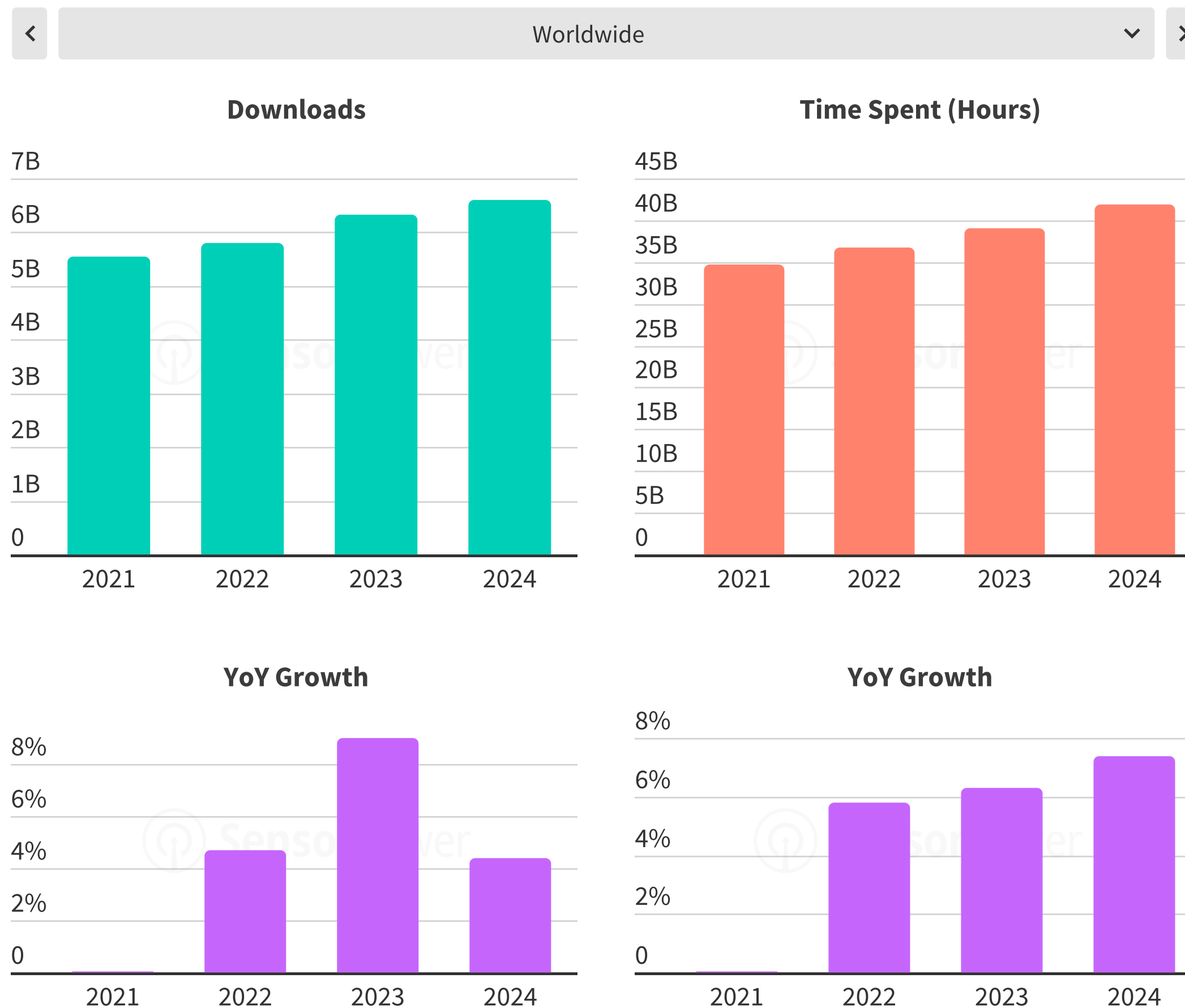
Chinese E-tailers Boost Retail Globally, Though Results Vary by Market

The retail industry continues to benefit from the digitization of the shopping experience, as having omnichannel offerings (physical, web, and mobile) has become crucial to drive traffic and conversion. Chinese e-tailers have contributed to the boom in downloads and time spent, as both [SHEIN](#) and [Temu](#) continue to expand into new markets in Europe, Latin America, and Asia (including some of the largest markets like Brazil).

While 2024 was a nice year for Retail apps globally, demand slowed in several key markets. In the United States, for example, downloads and time spent declined with consumers displaying a bit more caution with their discretionary spending. A significant portion of this decline can also be explained by a market correction following the huge growth in 2023 driven by apps like Temu — US retail downloads were still up 17% in 2024 vs. 2021, and time spent was up 15% over this same period.

Source: Sensor Tower
Note: iOS and Google Play combined. iOS only for China..Retail apps classified using Sensor Tower's taxonomy as of January 5, 2025.

Yearly Trends for Retail Apps



Temu Leads a Competitive Shopping App Market

General Shopping apps like [Temu](#) and [Amazon](#) take the bulk of Retail downloads. Looking closer at the other top subgenres (tip: click the **Shopping (General)** label at the top of the chart to hide this subgenre), Coupon & Rebate apps are on the rise as shoppers become more cost conscious following a period of high inflation. Grocery Stores are also embracing mobile as a way to boost customer loyalty.

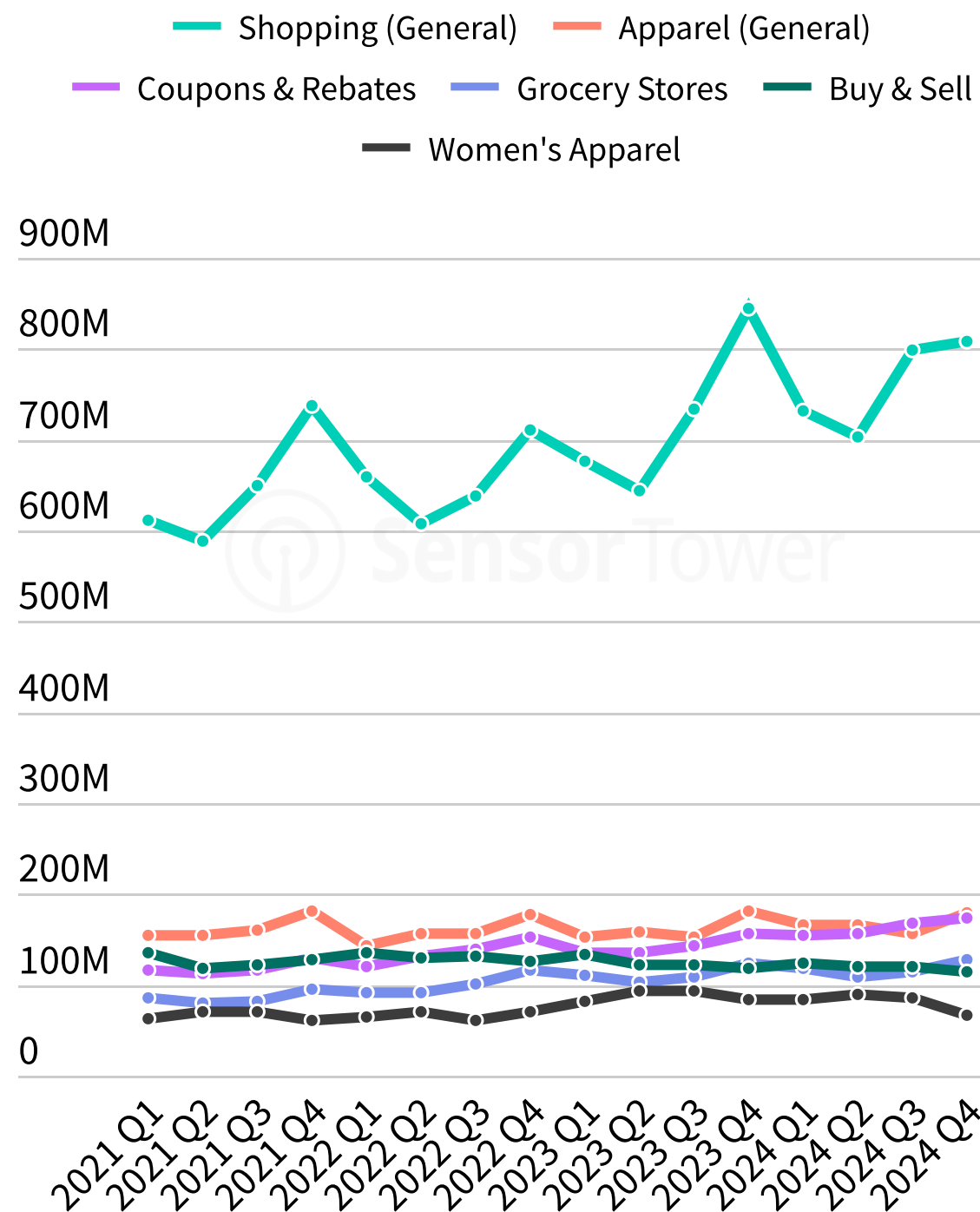
Temu led global downloads in 2024, followed by [SHEIN](#) and other general marketplaces. Consumers increasingly look for platforms they can shop across sectors — from grocery to apparel — and who offer fulfillment services, such as two-day shipping or same-day delivery. These apps also benefit as consumers usually have them set up with payment options, making the transition from browsing to buying seamless and lessening cart abandonment. Notably, this is a strength of the Chinese e-tailers, whose supply chain advantage allows them to offer free shipping and bargain pricing has resonated globally as consumers grapple with inflation, interest rates, and an uncertain geopolitical environment.

Source: Sensor Tower
 Note: iOS and Google Play combined. iOS only for China..Retail apps classified using Sensor Tower's taxonomy as of January 5, 2025.

Retail Download Trends by Subgenre

< Worldwide >

Quarterly Downloads by Subgenre



Top Apps by Downloads in 2024

Rank	App	Subgenre
1	TEMU	Shopping (General)
2	SHEIN	Women's Apparel
3	meesho	Shopping (General)
4	Amazon Shopping	Shopping (General)
5	Shopee	Shopping (General)
6	Flipkart	Shopping (General)
7	Alibaba.com	Shopping (General)
8	AliExpress	Shopping (General)
9	Shopsy	Shopping (General)
10	Mercado Libre	Shopping (General)



Retail Apps are Going Global

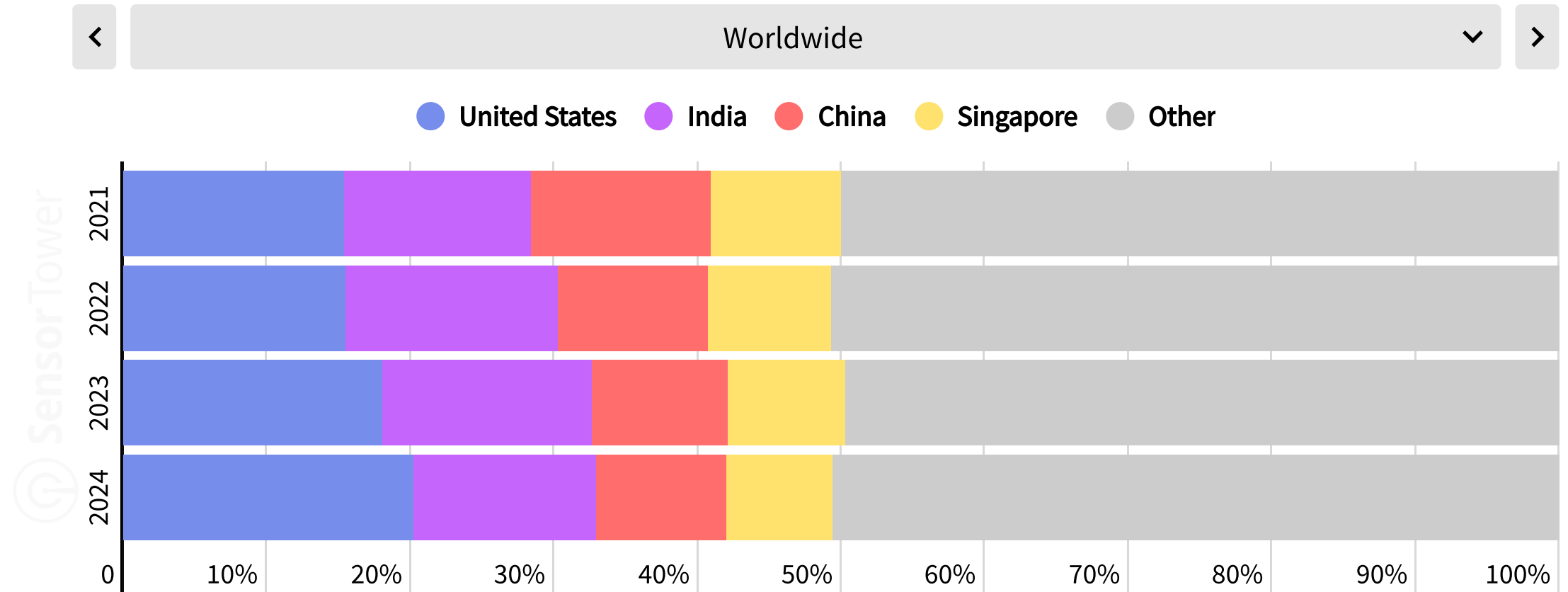
The retail app market as a whole is still quite regional, with most of the biggest markets getting a large share of downloads from domestic publishers. China Mainland, Japan, and India are some examples with at least 70% of downloads coming from local-based publishers. Globally, the United States leads the way with top apps like [Temu](#) and [Amazon](#) (Temu is headquartered in the United States, though its parent company, PDD Holdings, is based in China).

Most markets are seeing increasing competitive from foreign retail apps. Domestic-based publishers accounted for their lowest share of downloads in the past four years in most of the included markets, including Brazil, India, and the United States.

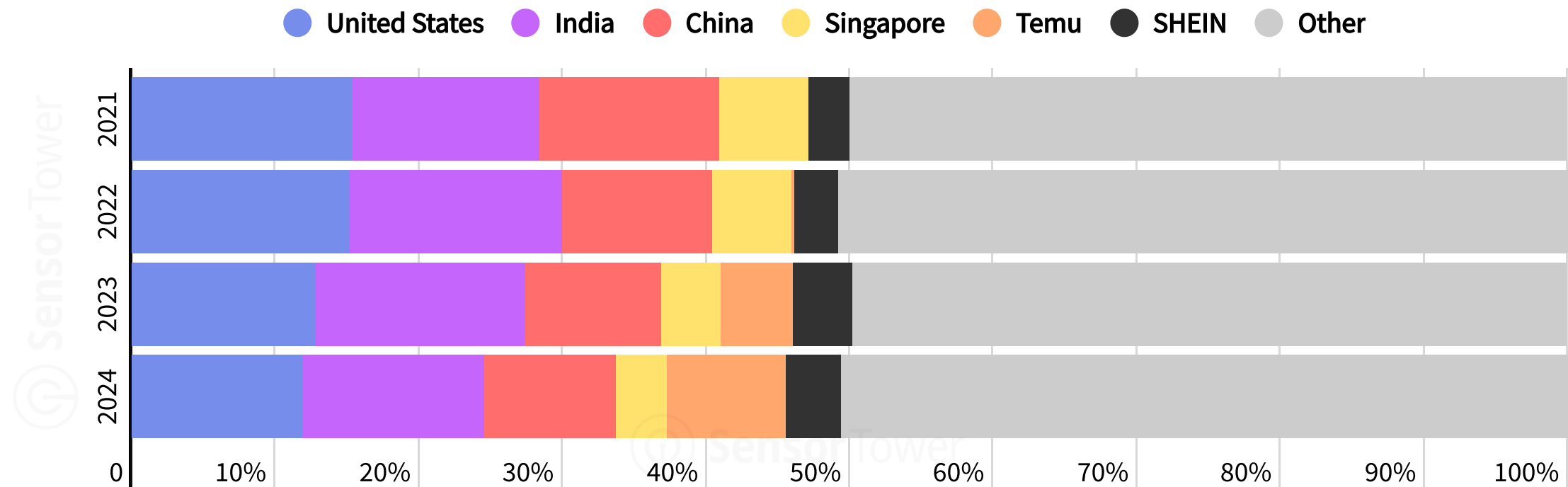
Sensor Tower Data in the News
 Look out for Sensor Tower data cited in The Wall Street Journal, TechCrunch, CNBC and more. For example, see [coverage on Temu's US performance in Forbes](#).

Source: Sensor Tower
 Note: iOS and Google Play combined. iOS only for China..Retail apps classified using Sensor Tower's taxonomy as of January 5, 2025.

Share of Downloads by Publisher Country for Shopping Apps



Share of Downloads by Publisher Country (Temu and SHEIN Counted Separately)



Top Retailers Leverage All Tools Available, From Mobile to Retail Media

Top US retailers like Walmart and Target are leaders in both retail media and mobile app usage as they use every opportunity available to connect customers with the products they are searching for.

Unsurprisingly, mobile-first food delivery companies like Uber Eats and DoorDash have relatively high app usage compared to traditional brick and mortar retailers. On the other side, Pet Stores lean heavily on retail media but have yet to invest as much in boosting mobile app adoption, suggesting that mobile could be a nice opportunity for retailers like Chewy and Petco to improve the shopping experience and boost customer loyalty.

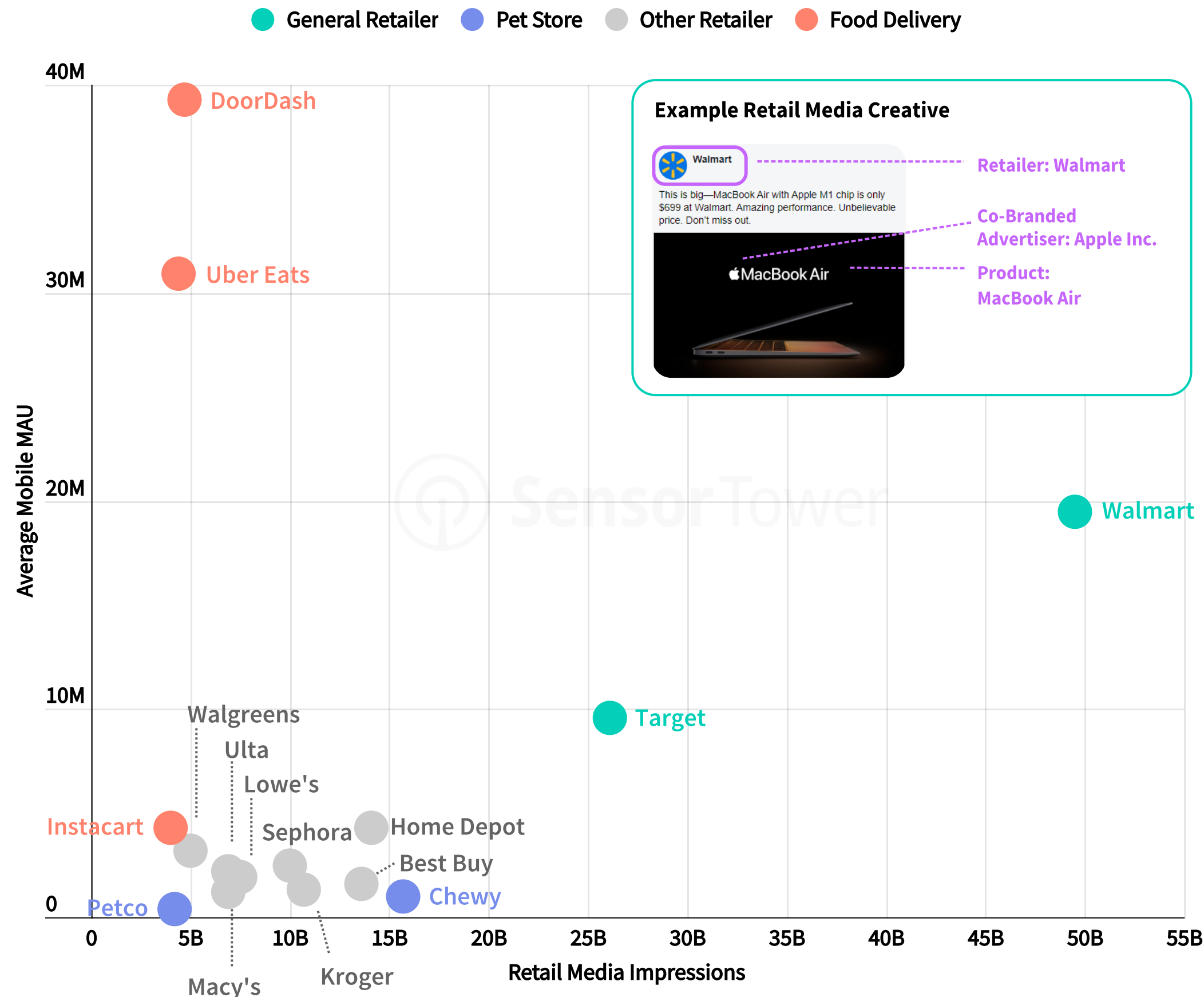
What is Retail Media?

Sensor Tower's Retail Media Insights provides marketers with complete visibility into the co-branded digital advertising ecosystem and retail media networks. Your customized marketing insights reports empower you with a view into spend, media mix, impressions, and share of voice for display, video, mobile, OTT, and paid social across your selected retail partners and competitors. [Click here to learn more](#) or [request a demo!](#)

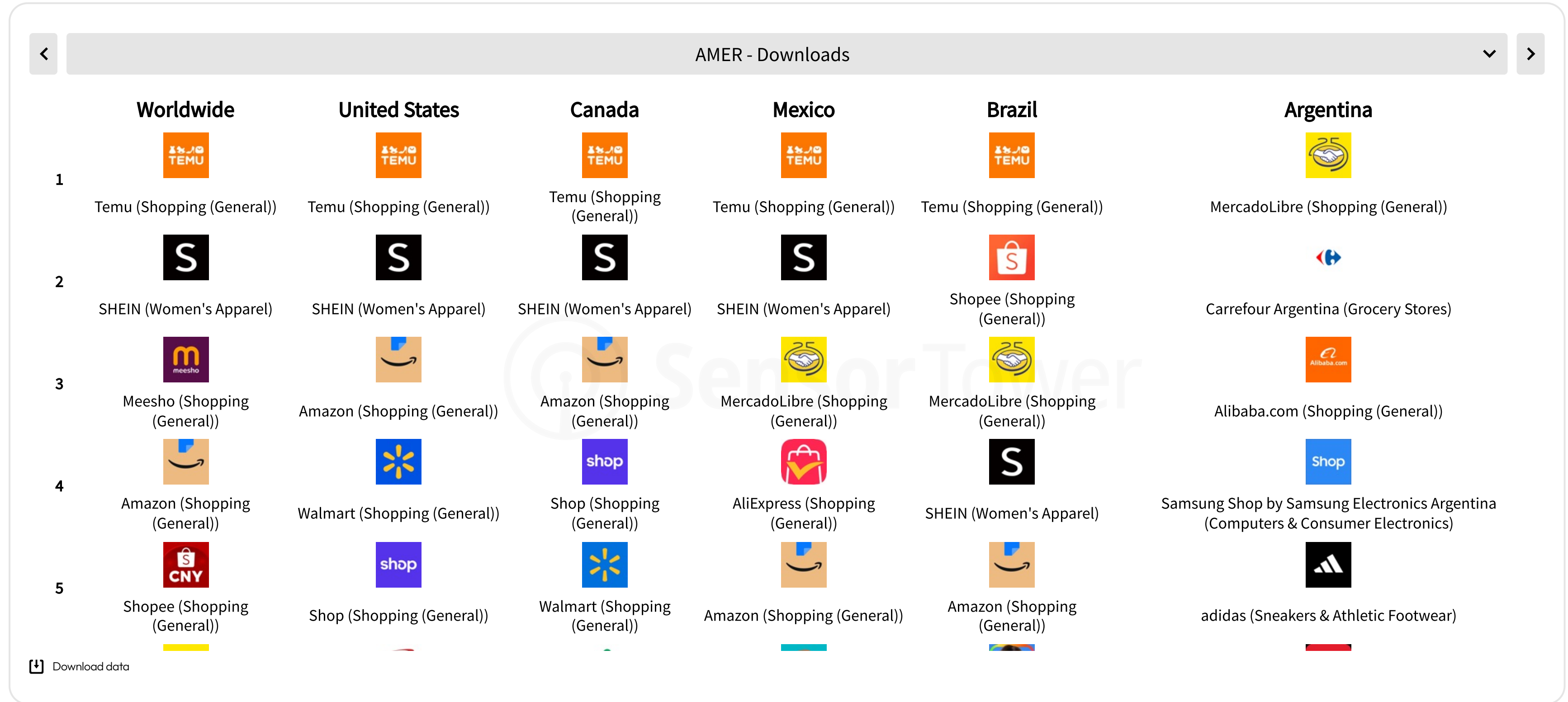
Source: Sensor Tower
 Note: Active users are iOS and Android combined. Retail media channels include display, video, mobile, OTT, and paid social.

Average Mobile Monthly Active Users (MAU) vs. Retail Media Impressions Across All Devices

January - November 2024, United States



2024 Rankings by Market | Retail



Source: Sensor Tower
 Note: iOS and Google Play combined. iOS only for China. Apps classified using Sensor Tower's taxonomy as of January 5, 2025.

06

Video Streaming

Engagement in streaming apps is falling as users experience "digital fatigue" and competition from other entertainment apps like TikTok. Monetization is still flourishing despite this, with strong growth in mobile consumer spend and OTT ad spend.

The Disney logo is centered within a dark blue rounded rectangular box. The logo itself is white and features the classic cursive script for the word "Disney".

Engagement Trends Reveal a Saturated Streaming App Market

While streaming mobile apps have seen ongoing growth in in-app revenue and downloads, engagement is falling as users experience "digital fatigue", macroeconomic pressure on consumer spending, competition from social apps, and as networks increasingly depend on live events (sports, etc.) and tentpole content to retain users. The lack of switching costs between the various streaming platforms also allows users to churn on and off of the different networks based on programming, making it difficult for newer and smaller platforms to drive loyalty and grow subscribers.

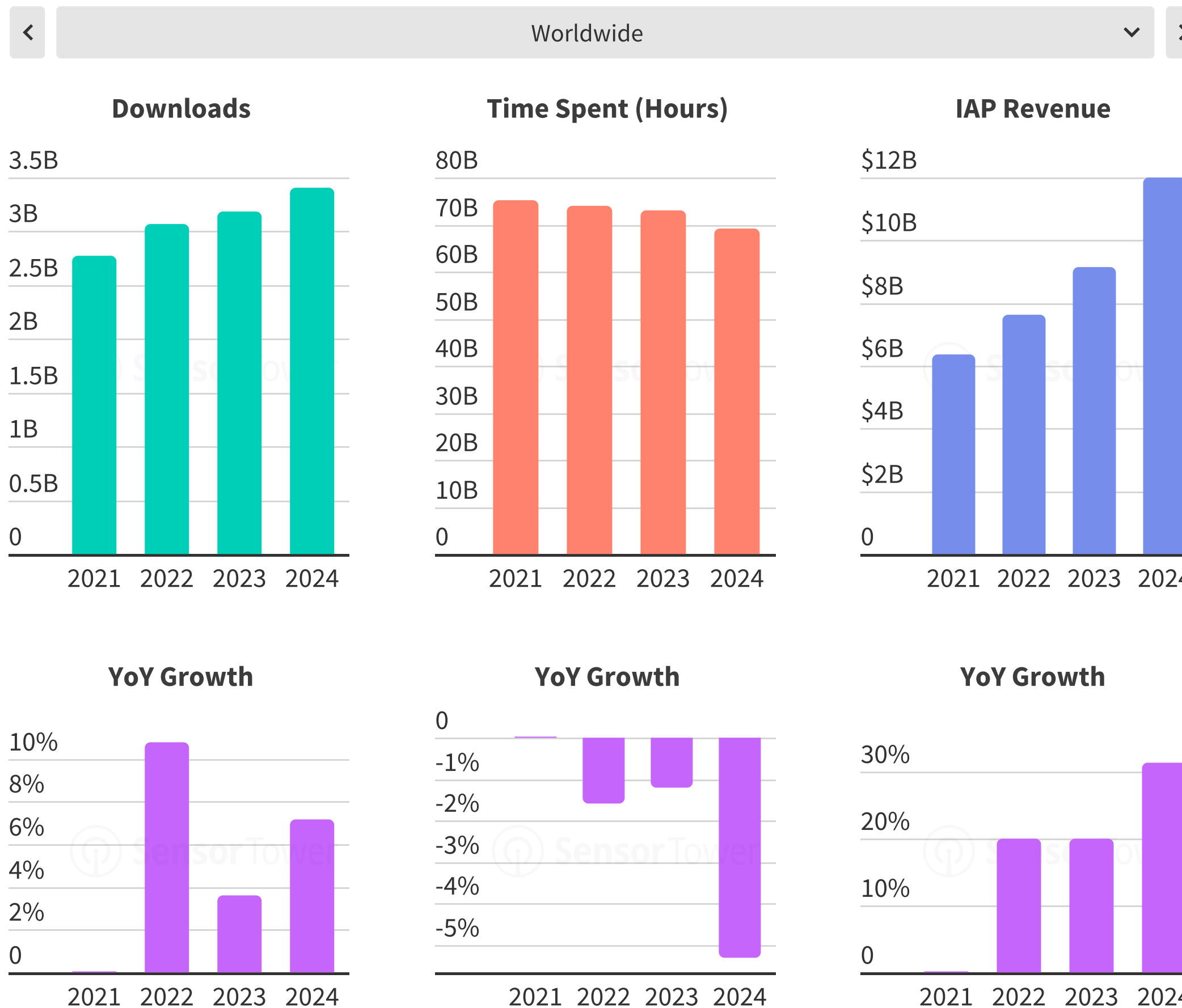
Excluding India, time spent on streaming apps was roughly the same in 2024 as it was the previous year, so there are pockets of growth in emerging markets. Time spent still declined in some of the highest revenue markets like the US and China. Some of the rise in IAP revenue may be attributed to consumers becoming more comfortable paying for these services on their mobile devices, even as they split time watching on their TVs, phones, and other devices.

Quickly Identify Breakout Performers

Sensor Tower customers can quickly [identify the fastest growing apps](#), including short-form drama apps like DramaBox and ShortMax. [Click here to request a demo!](#)

Source: Sensor Tower
 Note: iOS and Google Play combined. iOS only for China. Revenue is gross — inclusive of any percent taken by the app stores. Video Streaming apps classified using Sensor Tower's taxonomy as of January 5, 2025.

Yearly Trends for Video Streaming Apps



United States OTT Ad Spend Approached \$16 Billion in 2024, Up 10% YoY

Hulu remains the largest Over-the-Top (OTT) advertising platform, but rivals, such as Netflix and Disney+ have added ad-supported options to their offerings and are seeing rapid gains in advertising spend and impressions on their networks. As OTT has a broader audience than certain social networks, it's attractive to advertisers who wish to reach a broad and diversified demographic.

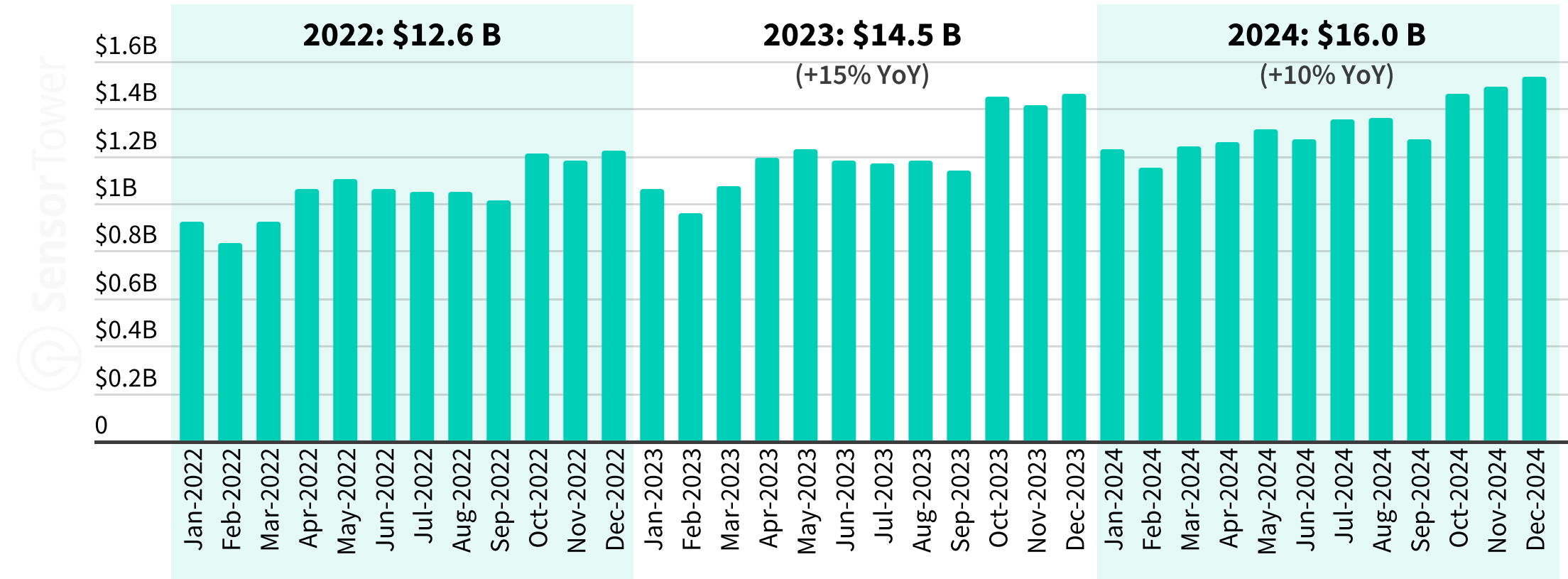
As the larger networks hit saturation in many markets, they have added ad-supported subscriptions to allow them to monetize their networks and attract consumers at a lower price point than those who can afford to pay for the ad-free service.

Want More Advertising Insights?

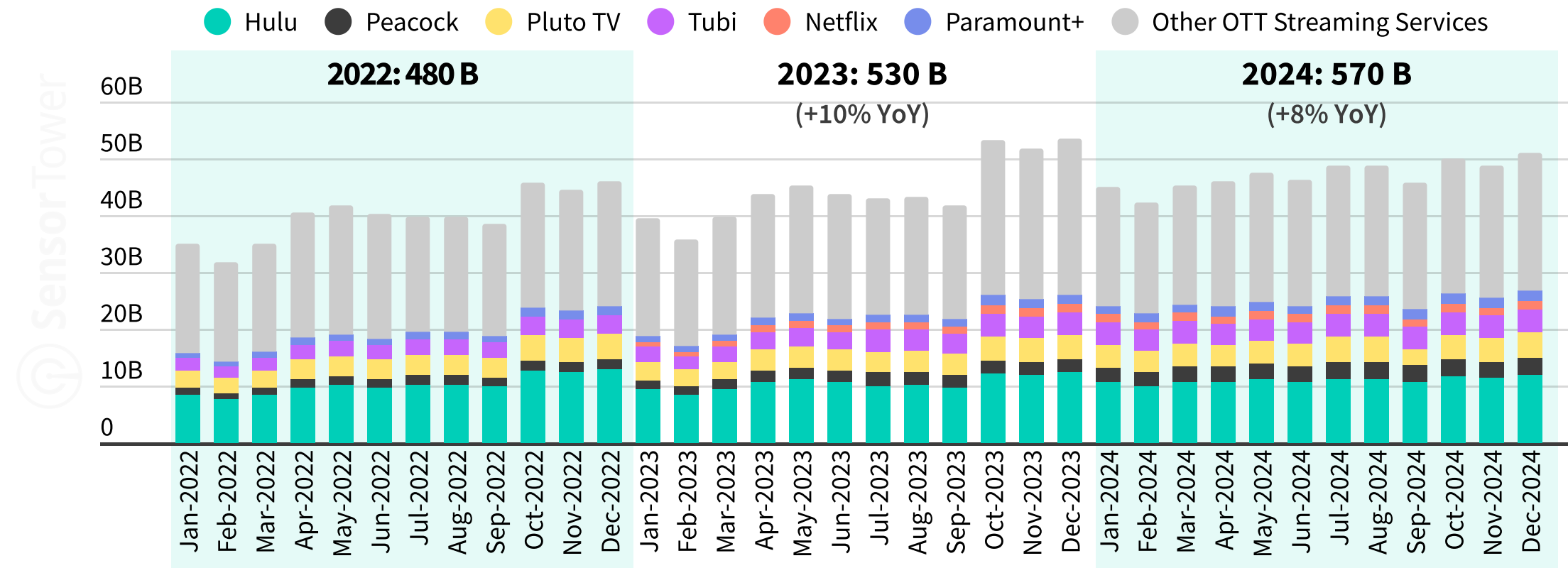
Sensor Tower's [State of Digital Advertising 2024: OTT Snapshot](#) report digs into the latest trends in OTT advertising in the United States.

Source: Sensor Tower
Note: Ad spend and impressions estimates as of January 5, 2025. Includes ads on connected TVs, streaming devices (e.g., Apple TV, PlayStation, Roku), and desktop and mobile devices.

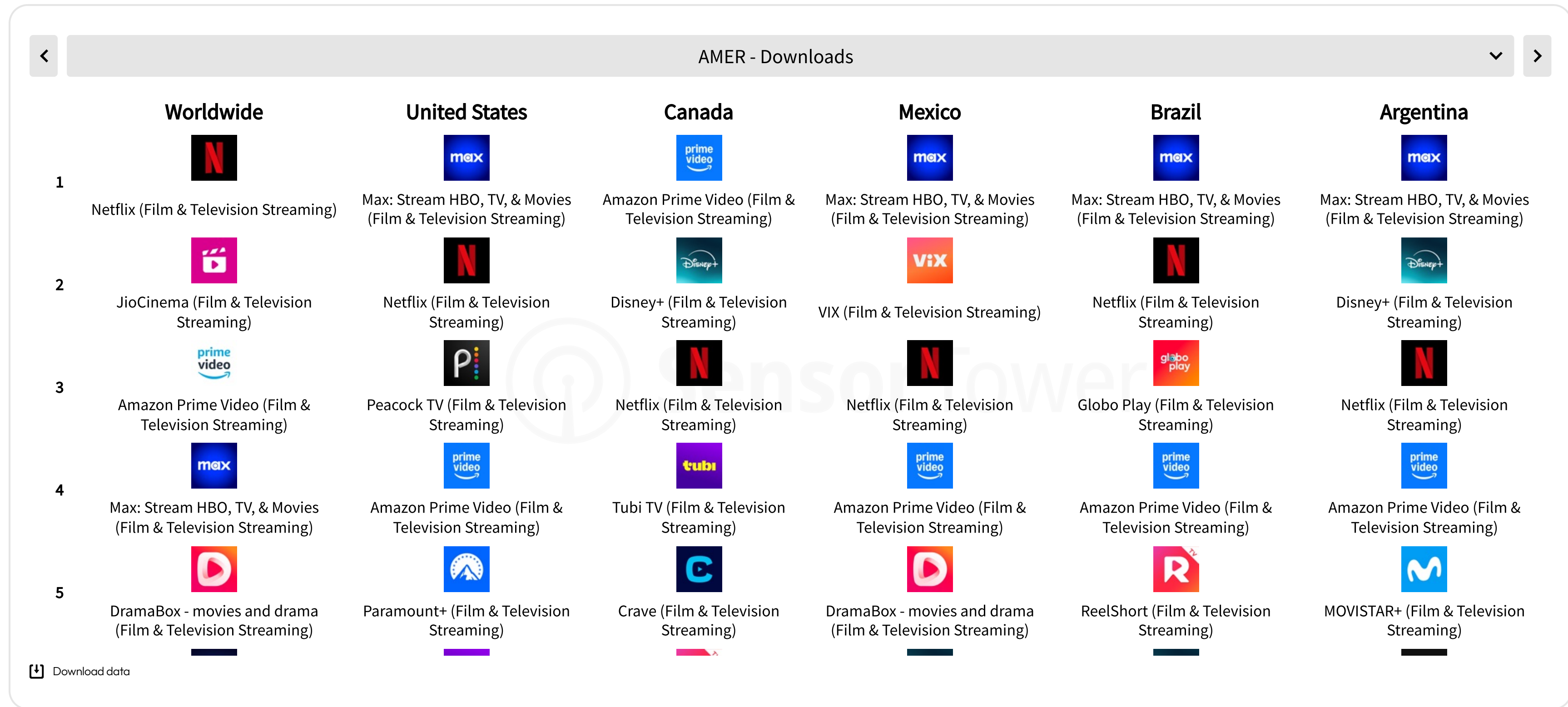
Monthly United States OTT Ad Spend



Monthly United States OTT Ad Impressions by Streaming Service



2024 Rankings by Market | Video Streaming



Source: Sensor Tower
 Note: iOS and Google Play combined. iOS only for China. Apps classified using Sensor Tower's taxonomy as of January 5, 2025.

07

Social

Time spent in Social Media apps reached an all-time high in 2024. Meanwhile, top apps continued to diversify their monetization with in-app purchase and subscription offerings.



Reddit has utilized Sensor Tower over the last year as we've built out our App Ads business and found their data, insights, and trends to be invaluable. Sensor Tower's market insights have allowed us to see not only the trends across our clients' focus areas, but also how that can be paired with Reddit's Community based marketing approach to refine acquisition strategies and move the App ecosystem forward.



Ryan Angerami
Head of App Dev.
Reddit



Mobile Users Spent 3 Trillion Hours on Social Apps in 2024

iOS and Android phone users spent a combined three trillion hours on Social Media and Social Messaging apps in 2024, up 6% from the 2.8 trillion hours spent in 2023. India was a major contributor to this growth with Social app time spent climbing 16% YoY in the market.

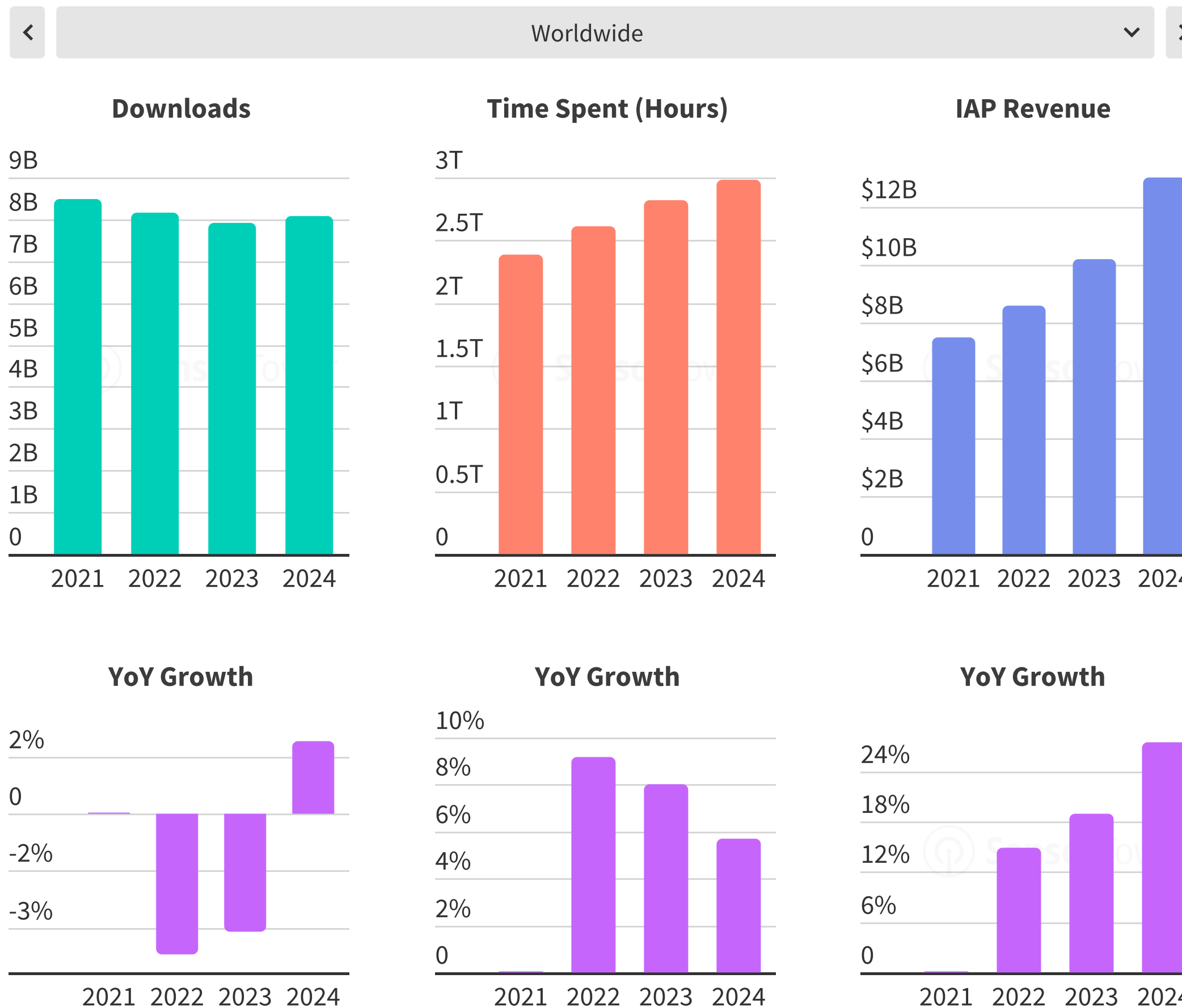
Social apps are also diversifying their monetization strategies. While the social media giants were traditionally reliant on advertising for the bulk of their revenue, TikTok's success with in-app purchases (IAPs) prompted other apps like Instagram and Snapchat to add their own IAPs as an additional revenue stream, particularly as new regulations added challenges to the advertising market.

Downloads have remained high even in a stable market. Still, there have been some opportunities for new players to emerge. For example, changes to X (formerly Twitter) following its acquisition by Elon Musk opened the door for some new microblogging apps to enter the space.

Users Average at Least 1 Hour per Day in 3 Apps
 Sensor Tower customers can find out which ones achieved this milestone in 2024 [here](#).

Source: Sensor Tower
 Note: iOS and Google Play combined. iOS only for China. Revenue is gross — inclusive of any percent taken by the app stores. Social apps classified using Sensor Tower's taxonomy as of January 5, 2025.

Yearly Trends for Social Apps



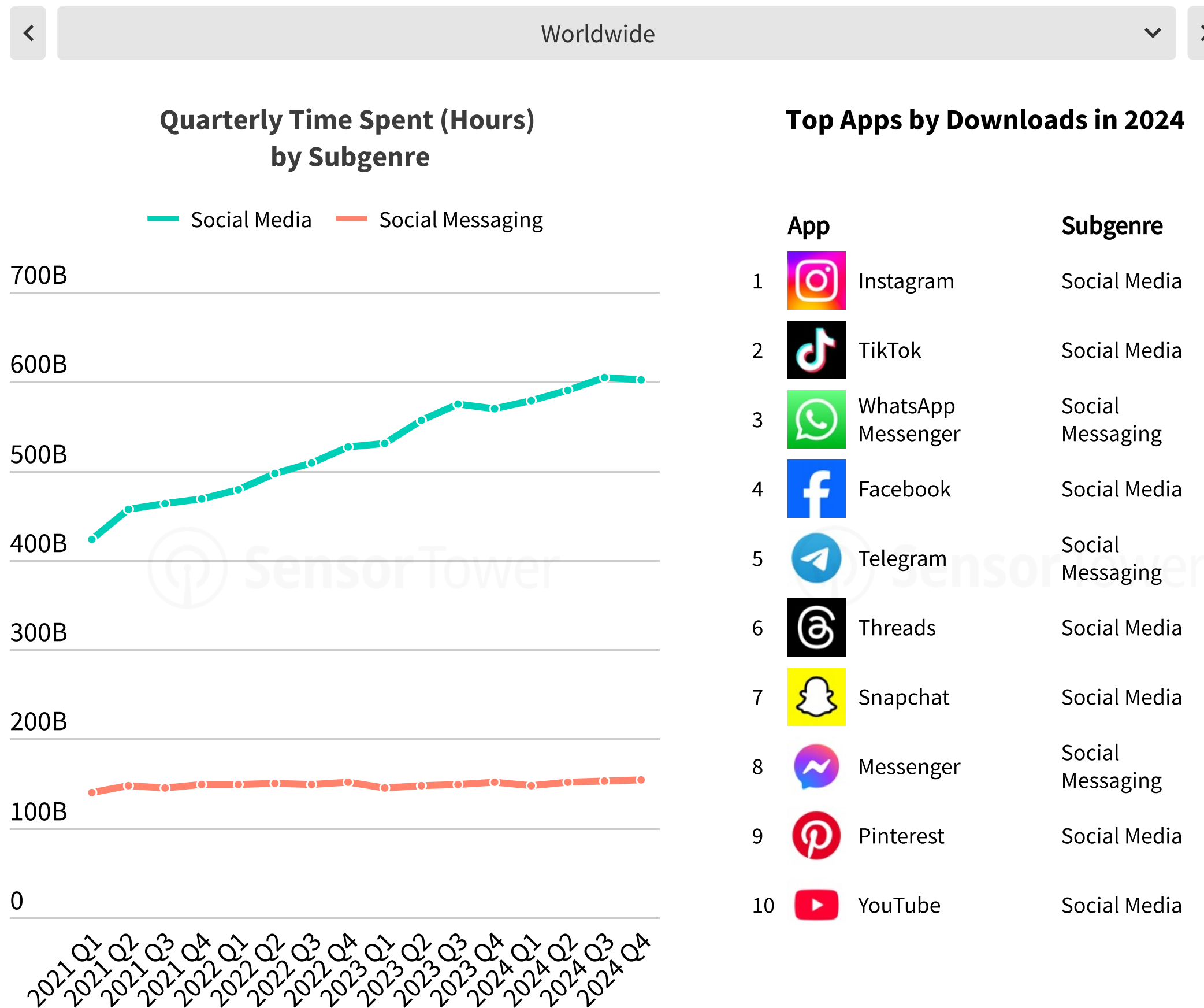
Social App Usage Plateaued in Some Mature Markets

Globally, Social apps show no signs of reaching their ceiling, with time spent climbing past 600 billion hours per quarter at the end of 2024. India in particular has seen huge growth, with time spent on Social Media apps more than doubling since the start of 2021. And this isn't only from an influx of new smartphone users in the country — for comparison, time spent on Social Messaging apps have held roughly flat over this same period.

Several markets may be reaching saturation, with some consumers even setting limits for time spent on Social Media apps. In the US and the UK, Social Media time spent was down slightly in 2024. Still, the average user in the US spent 90 minutes per day on Social Media apps, the average UK user wasn't far behind at 85 minutes per day.

Source: Sensor Tower
 Note: iOS and Google Play combined. iOS only for China. Social apps classified using Sensor Tower's taxonomy as of January 5, 2025.

Social Time Spent Trends by Subgenre



Advertisers Select Their Social Ad Channel Mix to Meet Their Audience

Advertising remains a key focus for Social apps, with social media networks like [Facebook](#) and [TikTok](#) accounting for roughly 75% of digital ad spend in the US according to Sensor Tower's latest [Digital Market Index report](#).

Many app categories tailor their social advertising to invest more in channels that have a similar demographic skew. Sports app users, for example, are more likely to be men and thus Sports app advertisers invest more in [X](#), [LinkedIn](#), and [Reddit](#), which also skew more towards male users.

There are some exceptions to this trend. Food & Drink apps frequently advertise on LinkedIn and X despite having a user base that skews more towards women and towards older users. This suggests that these ad channels can be a useful way for some Food & Drink apps to expand their user base and appeal to a different demographic.

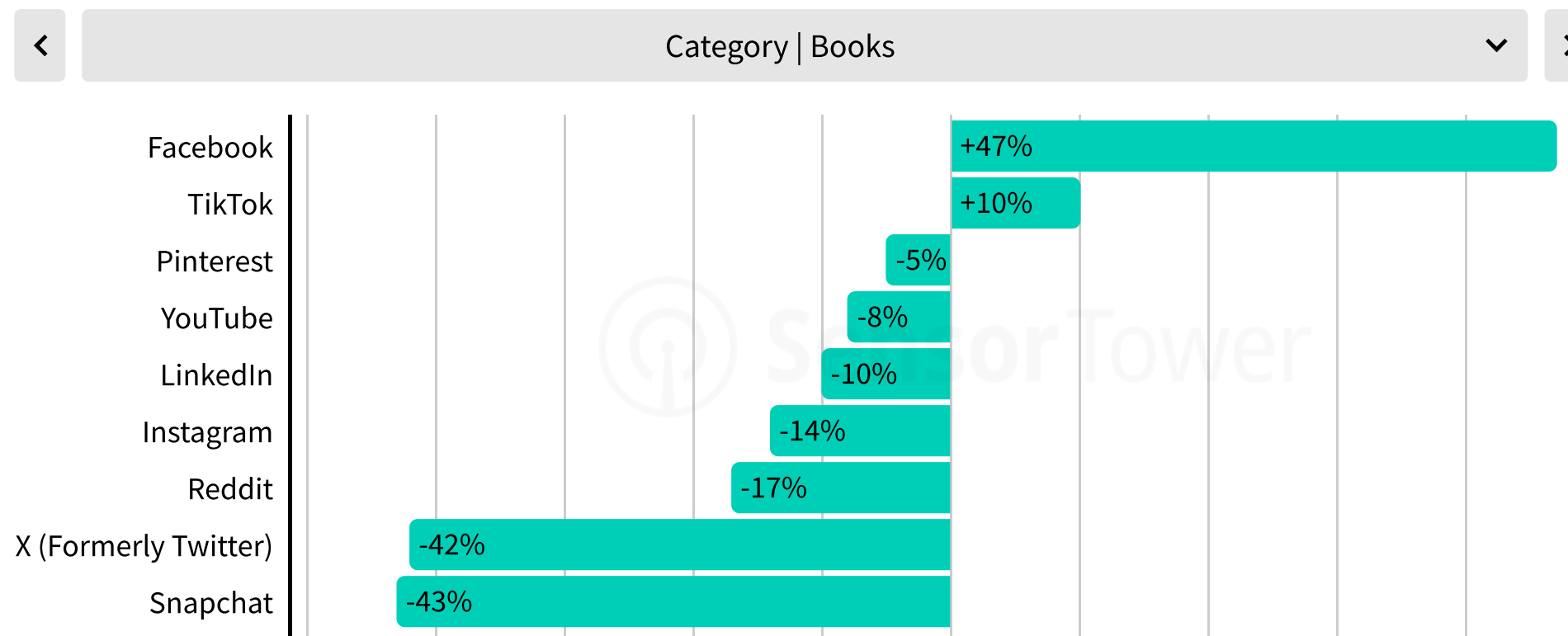
Reaching your Audience Shouldn't Be Costly

[Audience Insights](#) offers the first of its kind visibility into your existing, competitor, and potential new audiences, across all social and mobile platforms in one place.

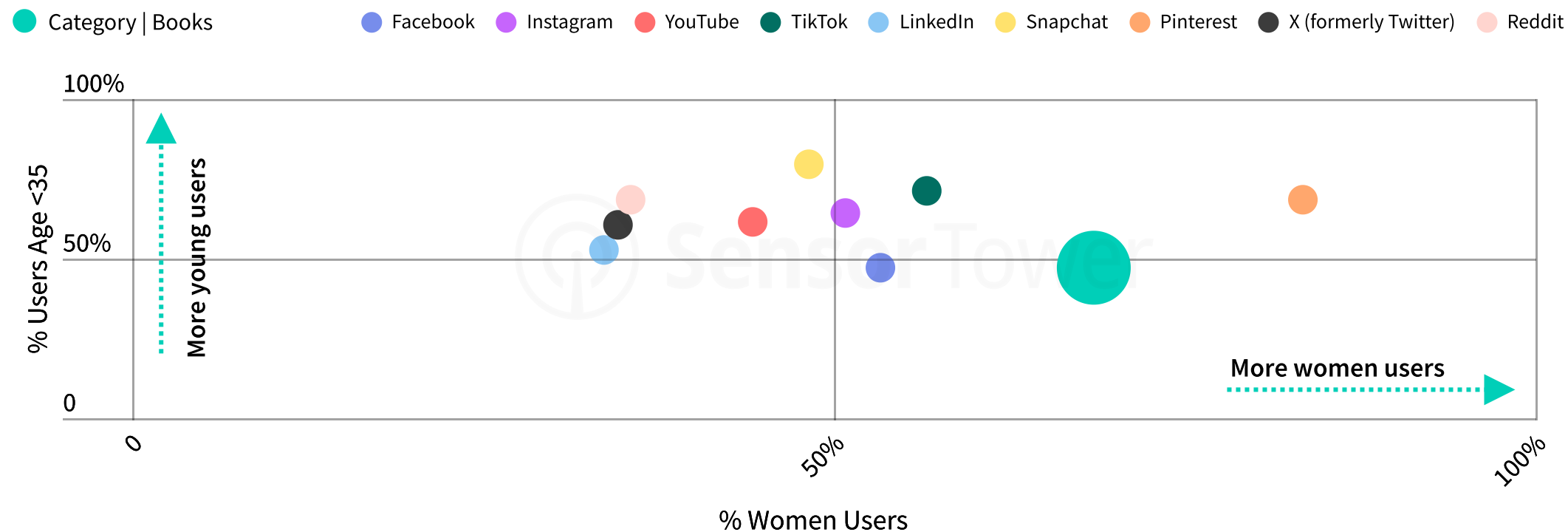
Source: Sensor Tower
 Note: Demographics and ad impressions for mobile app users on Android in the United States in Q4 2024. Gender represented as Men and Women only and is not representative of all gender identities.

Social Ad Channel Impressions by App Category

Share of Impressions, % Difference vs. General Population



App Category Demographics vs. Social App Demographics



Meta Doubles Down on Strategic Investment to Drive Reels Adoption on Facebook

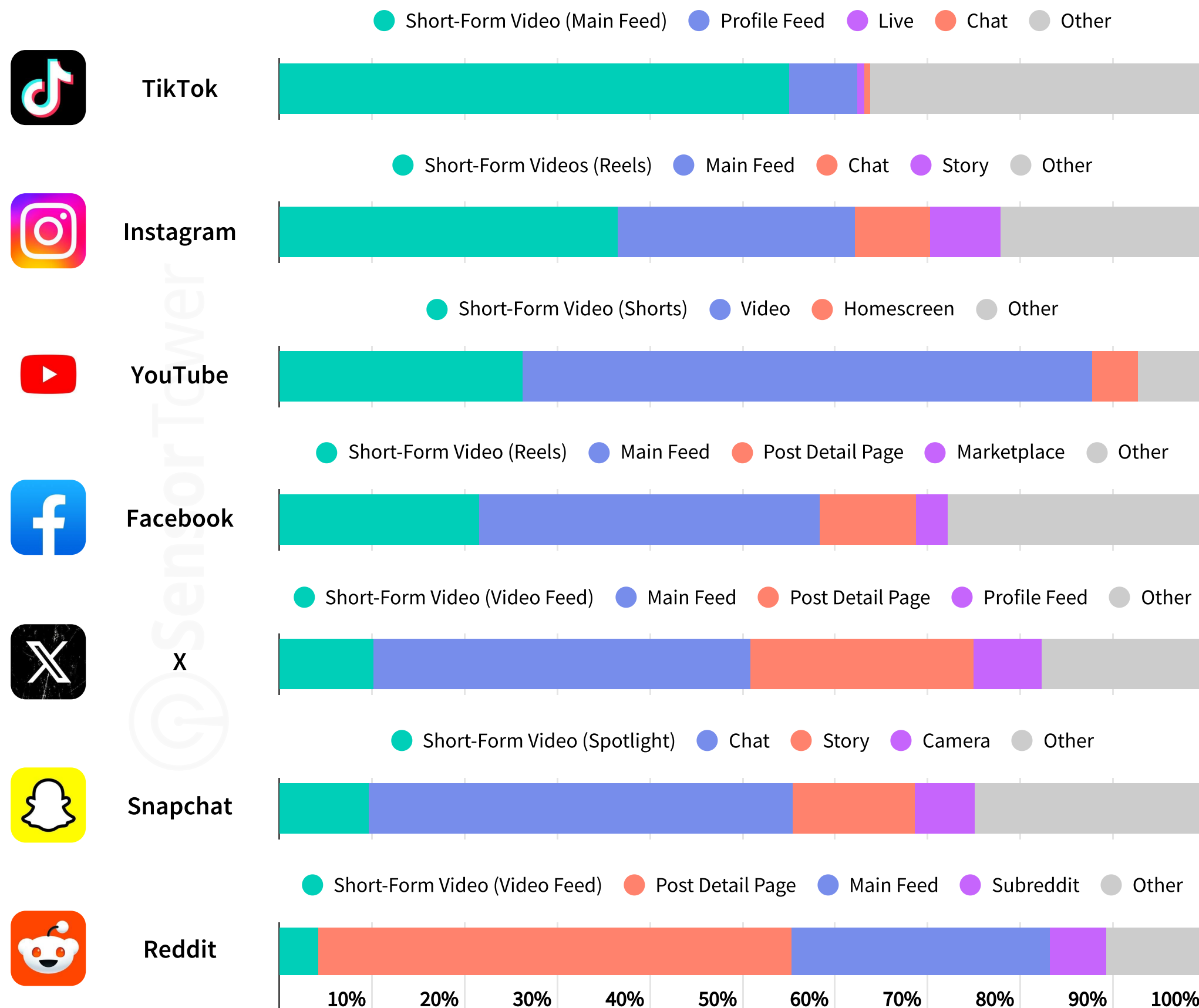
TikTok is the clear leader among short-form video apps, and its success has prompted other social leaders to add their own short-form video features.

During its 3Q24 earnings call, CFO Susan Li flagged that Meta has undertaken a concerted strategic effort to revamp Facebook's video player to allow for a full screen format, which will build on the company's ongoing efforts to unify and integrate Reels within video on Facebook. Sensor Tower data reveals that US Facebook user time spent on Reels in December 2024 increased 17 percentage points from January 2024, equating to millions of engagement hours shifting to the feature over the period in which Meta's unification efforts began. Although the Main Feed (36%) still made up the plurality of US Facebook user time spent in December, its share was down roughly two percentage points from January, which may suggest consumers are shifting their time to other features on Facebook, such as Reels.

Source: Sensor Tower
 Note: Android phones in the United States in 2024.

Short Video Usage in Top Social Apps

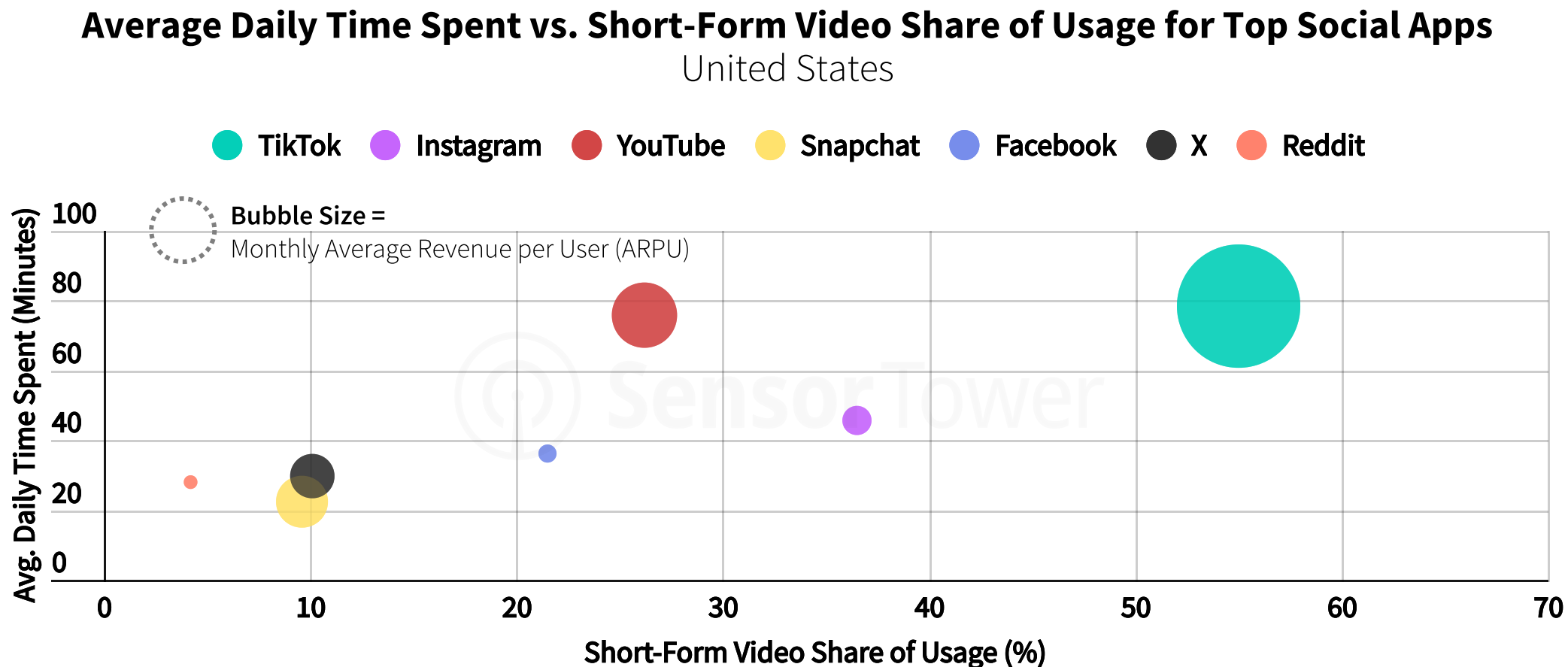
Share of Time Spent by In-App Feature



Can Competitors Capture TikTok's Short-Form Video Magic?

TikTok maintained a huge lead over its competitors in terms of monthly average revenue per user (ARPU) from in-app purchases. Even looking exclusively at iOS (since Google-owned YouTube doesn't monetize on Google Play), TikTok had nearly double the in-app purchase (IAP) revenue compared to the #2 Social Media app, YouTube, despite having roughly 60% of YouTube's average MAU. TikTok was also well ahead in terms of short-form video usage, and it has certainly been successful at monetizing this user attention.

Meta-owned Instagram and Facebook lag when it comes to ARPU. Both apps are attempting to monetize using similar one-time IAP offerings to TikTok, with Instagram Badges and Facebook stars, in addition to subscription options.



Top In-App Purchases for Social Apps on iOS in the United States as of December 31, 2024

	TikTok	Instagram	YouTube	Snapchat	Facebook	X	Reddit
1	65 coins - \$0.99	Meta Verified Standard (Monthly) - \$14.99	YouTube Premium (Monthly) - \$18.99	Snapstreak Restore - \$0.99	Supporter (Monthly) - \$4.99	X Premium (Monthly) - \$11.00	Reddit Premium (Monthly) - \$6.99
2	20 coins - \$0.29	Instagram Badge - \$4.99	YouTube Premium (Monthly) - \$18.99	Snapchat+ (Monthly Plan) - \$3.99	99 stars - \$0.99	X Premium Plus (Monthly) - \$30.00	Reddit Gold - \$1.99
3	330 coins - \$4.99	Instagram Badge - \$0.99	Movies & Shows - \$3.99	Snapchat+ (Monthly Plan) - \$3.99	45 stars - \$0.99	X Premium Basic (Monthly) - \$4.00	Reddit Annual Premium - \$59.99
4	130 coins - \$1.99	Meta Verified Standard (Monthly) - \$14.99	YouTube Premium (Monthly) - \$18.99	Snapchat+ (Monthly Plan) - \$3.99	530 stars - \$9.99	@elonmusk Subscription (Monthly) - \$4.00	Collectible Avatar - Tier 499 - \$4.99
5	1120 coins - \$16.99	Meta Verified Standard (Monthly) - \$14.99	YouTube Premium (Monthly) - \$18.99	Snapchat+ (Monthly Plan) - \$3.99	1200 stars - \$19.99	X Premium (Annual) - \$114.99	Reddit Gold - \$5.99

Key: One-Time Purchase | Subscription

Track the KPIs You Care About
 Sensor Tower customers can continue to monitor key metrics for these apps, including revenue per download (RPD) and average revenue per daily active user (ARPDau).

Source: Sensor Tower
 Note: iOS and Google Play combined in the United States. Top in-app purchases on iOS only.

Microblogging Apps Gain Users, but is Attention Shifting Elsewhere?

Discontent around changes to X following Elon Musk's acquisition of the service in 2022 caused it to lose some of its customer base and opened the door for competing services like Threads and Bluesky Social. The company has lost advertisers as well — according to Sensor Tower advertising data, 64 out of the top 100 advertisers from January through October 2022 (prior to the acquisition) no longer spent on X between January through October 2024.

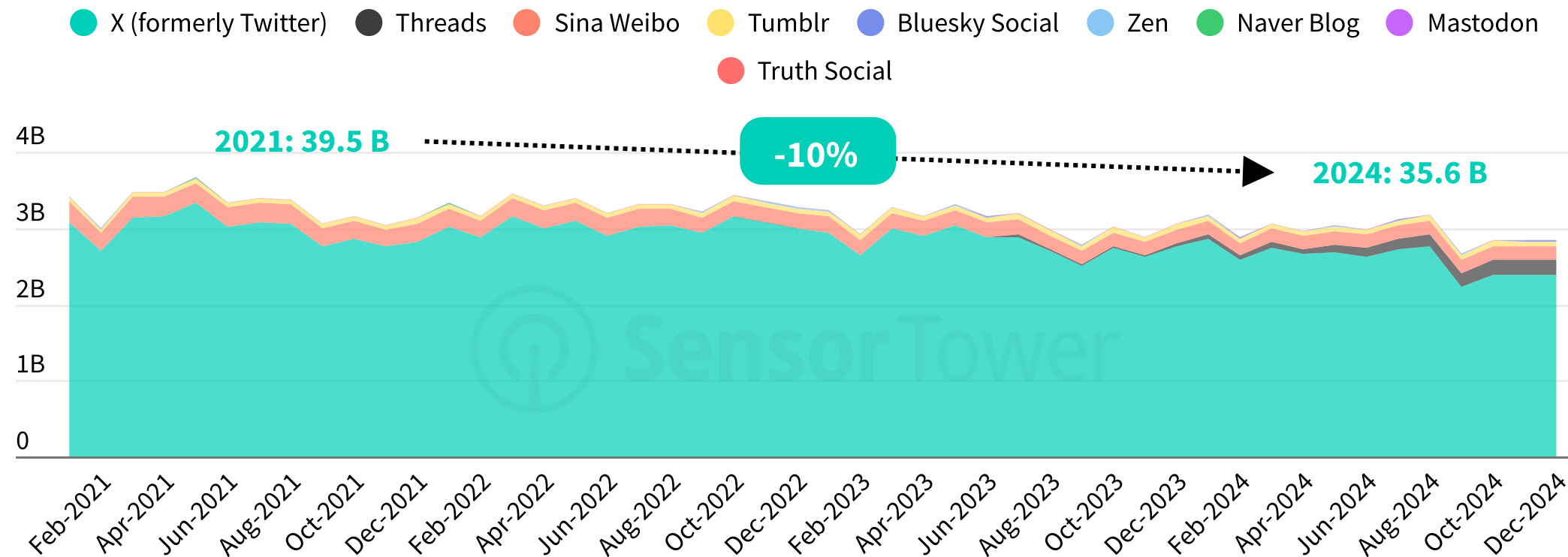
With X as the runaway leader by time spent in the space, global time spent for the top 10 apps fell 10% between 2021 and 2024. While some X users are switching to alternatives, others simply found other sources of entertainment like short-form videos or streaming.

By the December 2024, Threads global daily active users (DAU) had reached 45% of X's total — and 85% of X's monthly active users (MAU). However, X competitors are still struggling to achieve its high engagement, and the gap is narrowing slowly.

Dive into App Engagement Like Never Before
[Sensor Tower's Advanced Usage Insights](#) lets you create engagement benchmarks, analyze user retention, and even study day-to-day mobile behaviors.

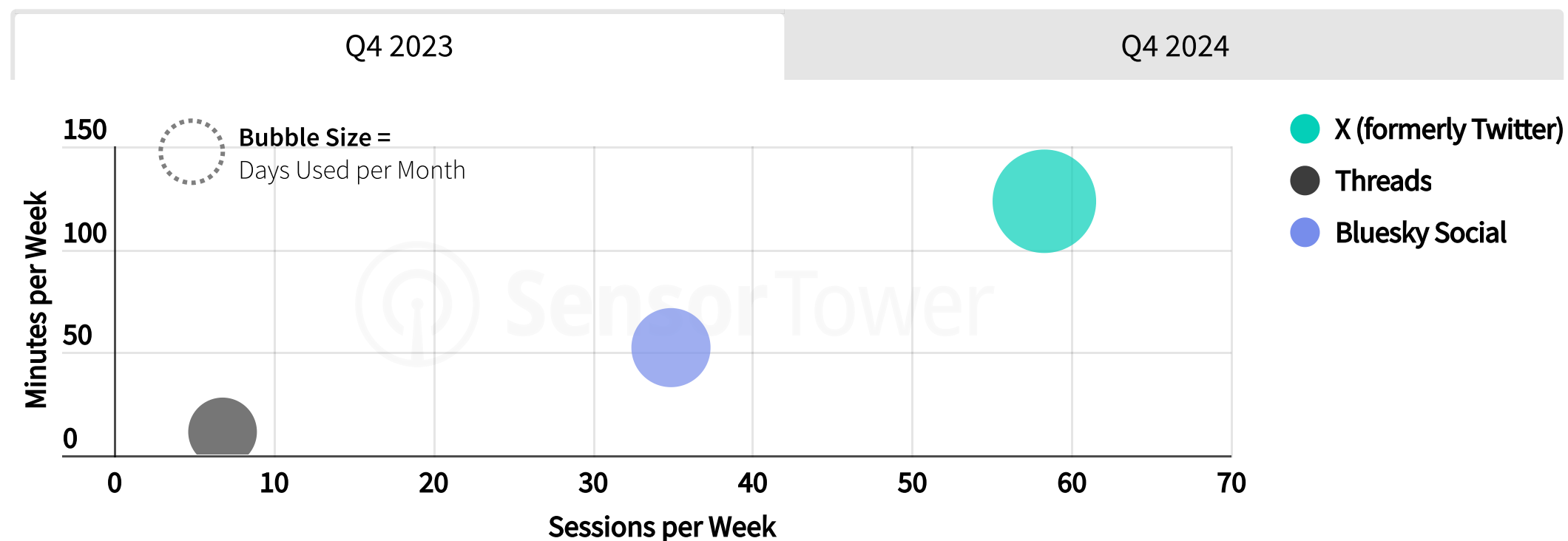
Source: Sensor Tower
 Note: Time spent across iOS and Android combined. Engagement metrics on Android only in the United States.

Worldwide Total Time Spent (Hours) in Top Microblogging Apps

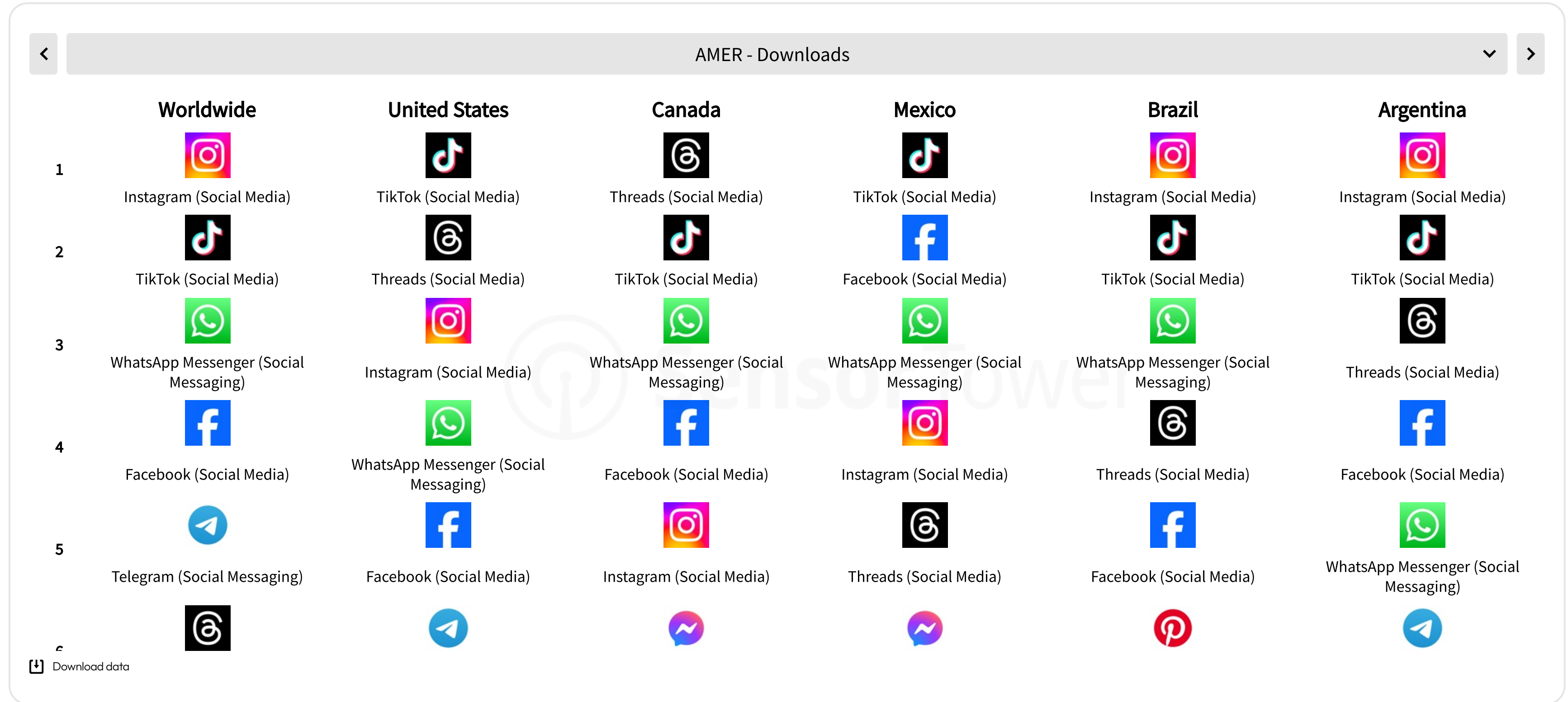


Microblogging App Engagement Summary

on Android in the United States



2024 Rankings by Market | Social



Source: Sensor Tower
 Note: iOS and Google Play combined. iOS only for China. Apps classified using Sensor Tower's taxonomy as of January 5, 2025.

08

Food & Drink

Mobile apps have become a critical part of the strategy for restaurants and grocery stores alike, improving the customer experience and boosting loyalty.

Bolt

getir

Nutrisystem[®]

SAZERAC



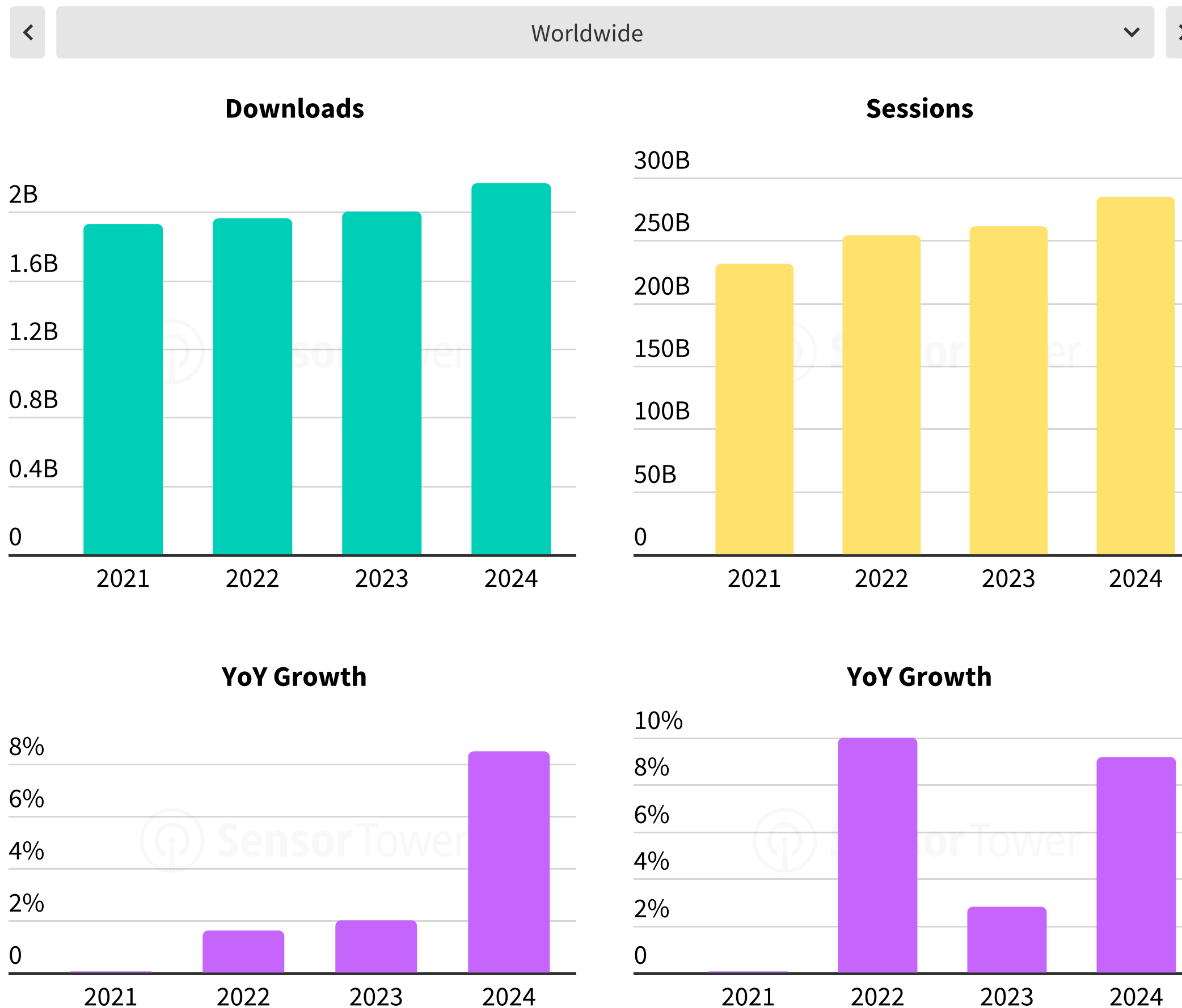
Mobile Apps Help Restaurants and Grocery Stores Improve the Customer Experience

Food & Drink app download and session growth accelerated in 2024 as more companies integrated the app into the customer buying experience. Whether it's fast food restaurants offering convenient options like pickup or delivery, or grocery stores giving easy access to coupons as a way to boost customer loyalty, mobile apps connected food providers with customers like never before.

While global trends have been fairly consistent, the Food & Drink app space still varies significantly between countries. The market in Latin America has yet to regain the high adoption seen during the pandemic, while countries like Japan and South Korea have seen strong growth return.

Source: Sensor Tower
 Note: iOS and Google Play combined. iOS only for China. Food & Drink apps classified using Sensor Tower's taxonomy as of January 5, 2025.

Yearly Trends for Food & Drink Apps



Q-commerce Demand Surges in India: Zepto's Growth Leads the Market

Between 2021 and 2024, downloads of Fast Food & Fast Casual Restaurant (FFFCR) apps grew by 24%, widening the gap compared to other subgenres. FFFCR apps saw particularly robust adoption in Japan, with an 85% increase, and in Turkey, where downloads surged by 76%. Meanwhile, Restaurant Ordering & Delivery downloads have turned the corner after falling off from the high demand during the pandemic.

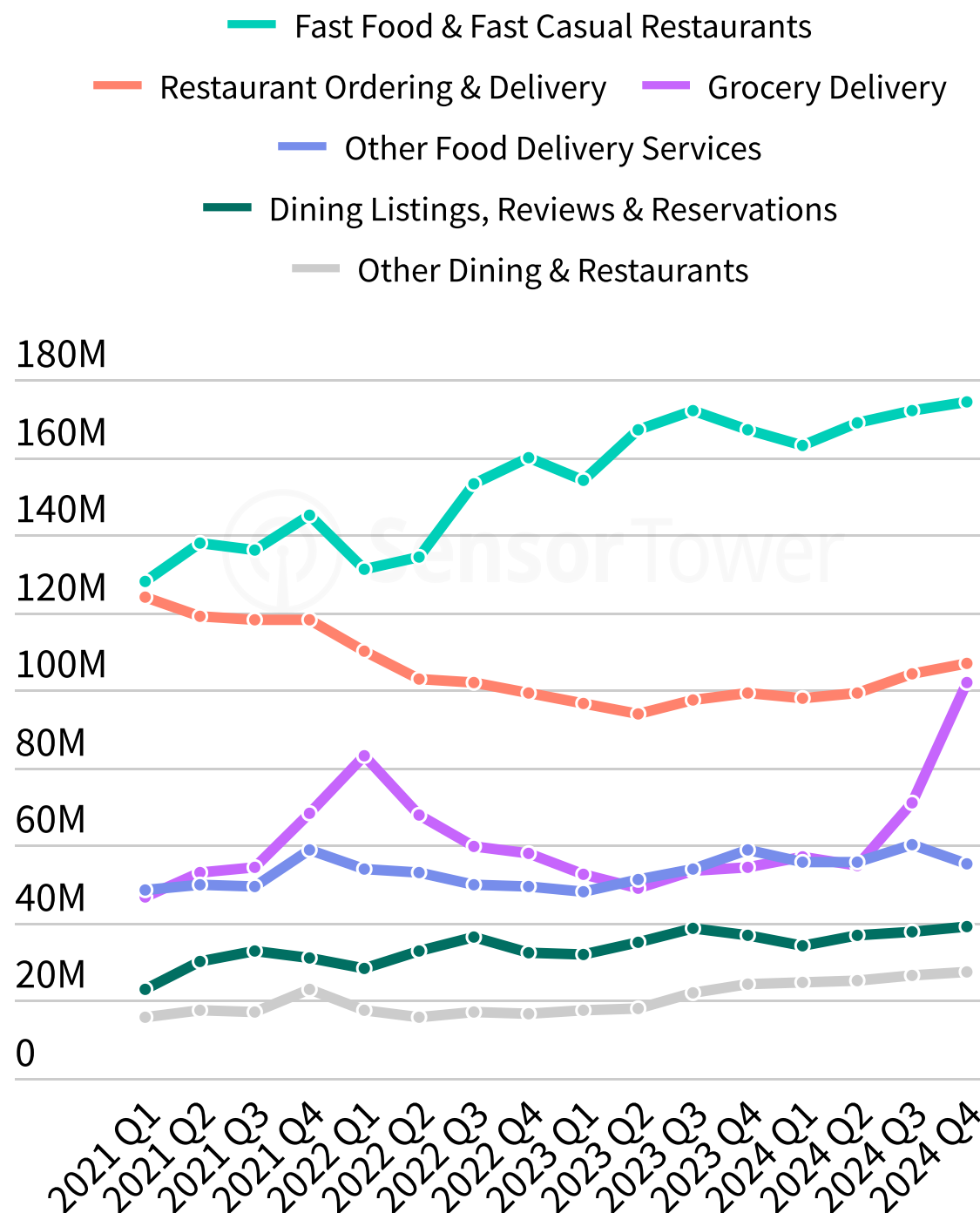
In the second half of 2024, the Grocery Delivery subgenre's downloads surged, driven primarily by Zepto's nearly 300% growth in India compared to H1 2024. Its introduction of the Postpaid feature in 2024, allowing customers to "buy now, pay later," solidified Zepto's position in India's Q-commerce market. In Q4 2024, Zepto's average MAUs in India surpassed Blinkit's for the first time.

Source: Sensor Tower
 Note: iOS and Google Play combined. iOS only for China. Food & Drink apps classified using Sensor Tower's taxonomy as of January 5, 2025.

Food & Drink Download Trends by Subgenre

< Worldwide >

Quarterly Downloads by Subgenre



Top Apps by Downloads in 2024

Rank	App	Subgenre
1	McDonald's	Fast Food & Fast Casual Restaurants
2	Zepto	Grocery Delivery
3	KFC	Fast Food & Fast Casual Restaurants
4	Domino's Pizza	Fast Food & Fast Casual Restaurants
5	Zomato	Dining Listings, Reviews & Reservations
6	Burger King	Fast Food & Fast Casual Restaurants
7	Grab	Other Food Delivery Services
8	Uber Eats	Restaurant Ordering & Delivery
9	Swiggy	Restaurant Ordering & Delivery
10	Blinkit	Grocery Delivery



Fast Food & Mobile Game Partnerships Drive New User Acquisition

In 2024, fast food chains are increasingly teaming up with popular games to attract new app users and enhance customer engagement. Notable collaborations include [McDonald's](#) partnership with [Genshin Impact](#) in the US and [KFC's](#) alliance with [Uma Musume Pretty Derby](#) and [Genshin Impact](#) in Japan.

Following their collaboration with Genshin Impact in the US, McDonald's saw a significant WoW app download increase of 105% in the first week. [Sensor Tower Audience Insights](#) show that in Q3 2024, 21% of Genshin Impact players used the McDonald's app, a rise of five percentage points from the previous quarter.

KFC's partnerships with Uma Musume and Genshin Impact in Japan led to a rise in app engagement, with 9% of Uma Musume players and 6% of Genshin Impact players using the app during the collaboration quarter, marking a four percentage point and three increase QoQ

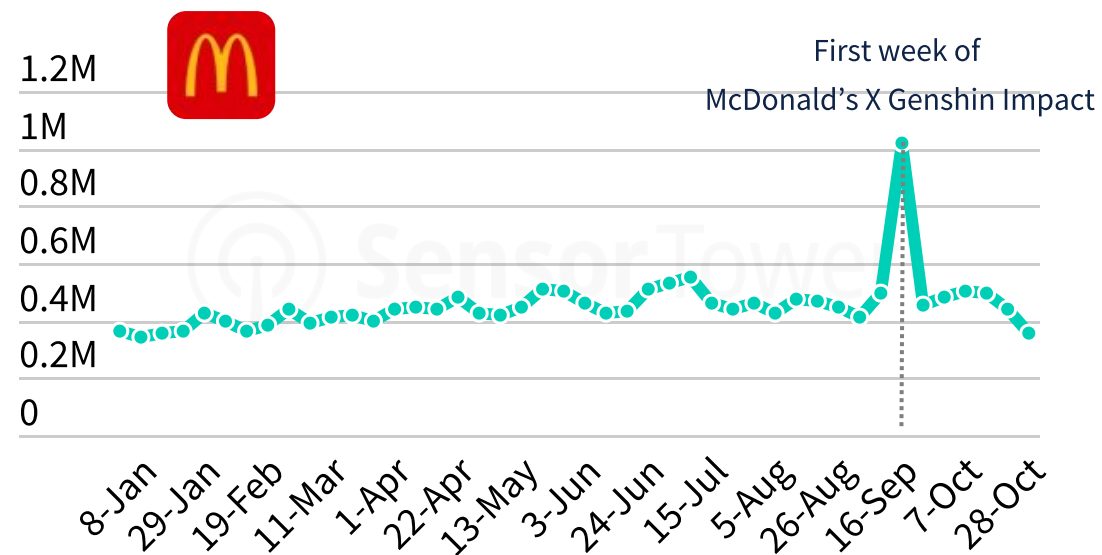
Explore Dozens of User Personas

Understand your target audience like never before with [Audience Insights](#). See overlap with Crypto Traders, Fitness Enthusiasts, Console Gamers, and more!

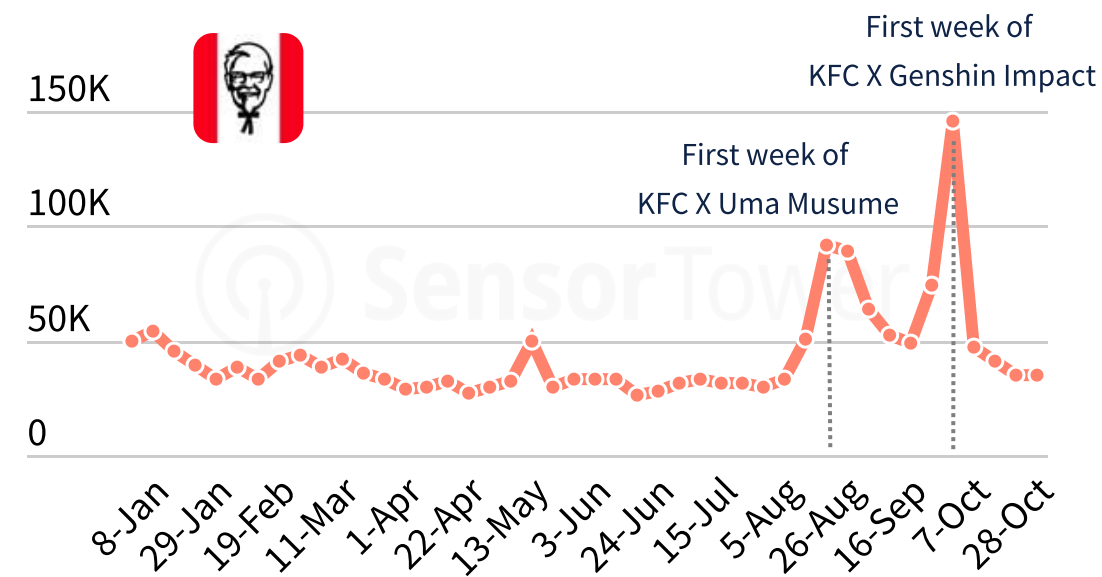
Source: Sensor Tower
 Note: iOS and Google Play combined. iOS only for China. Percentage of mobile gamers using Fast Food apps are Android only.

Fast Food Restaurant Weekly Downloads in 2024

McDonald's in the United States



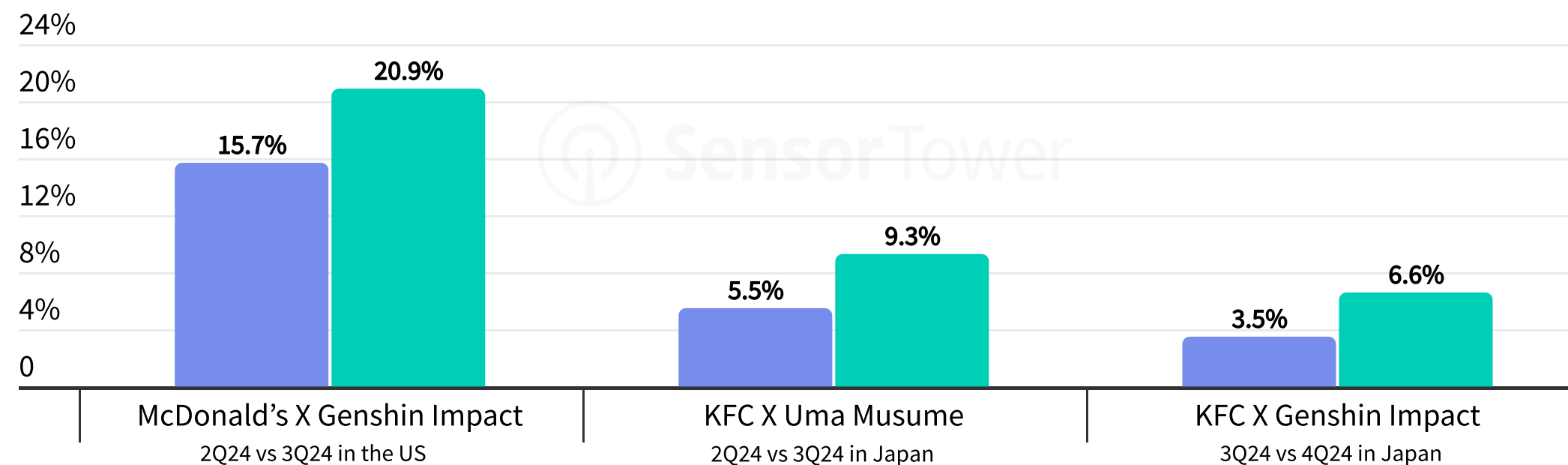
KFC in Japan



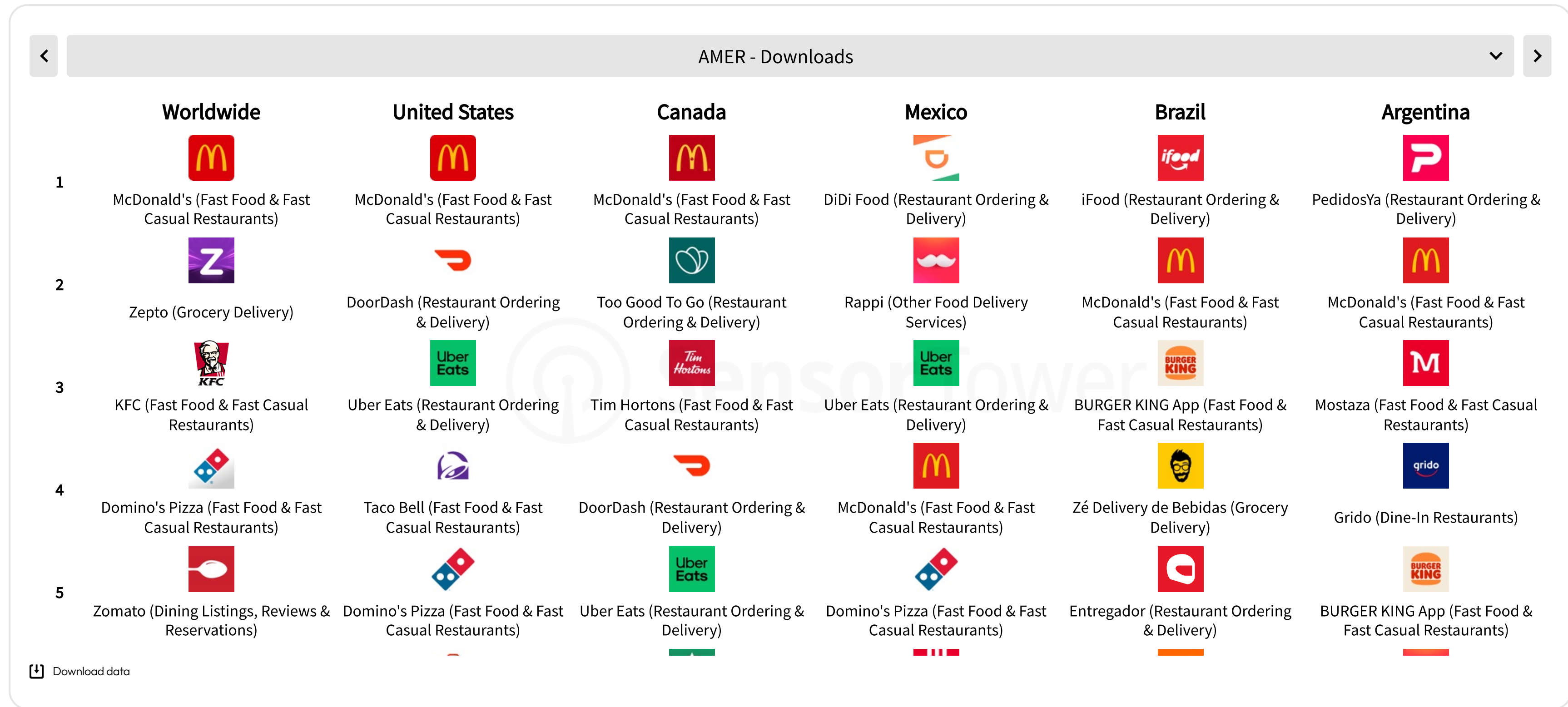
Percentage of Mobile Gamers Using Fast Food Apps

Quarter Before vs. Quarter After Collaboration

● Quarter Before ● Quarter After



2024 Rankings by Market | Food & Drink



Source: Sensor Tower
 Note: iOS and Google Play combined. iOS only for China. Apps classified using Sensor Tower's taxonomy as of January 5, 2025.

09

Travel

A few years after travel soared due to pent-up demand post-pandemic, a trend is clear: mobile apps are becoming an increasingly common part of people's travel experience.

“

Today's travelers are spending more time on phones, presenting new opportunities for brands to leverage all-in-one app offerings to meet customers where they're shopping. As a leading travel experiences marketplace, Viator is building a best-in-class mobile app that makes planning and booking experiences easier than ever – everything from helping travelers discover more personalized activities and modify bookings on the go, to giving tour operators a seamless way to communicate and share real-time information with their travelers.



Krzysztof Marcisz
VP of Product
Viator



Travel Apps Soared Post-Pandemic and Sustained Gains Since

Travel app downloads have shown stable YoY growth, reaching 4.2 billion in 2024, marking a 3% increase from the previous year. This growth has been fueled by post-pandemic recovery; however, the growth rate has decelerated compared to previous years, partly due to soaring travel costs in 2024.

Despite this, the genre has experienced a YoY rise in time spent, indicating that consumers are increasingly embracing mobile tools for planning and booking their trips.

Interested in More Travel Insights?

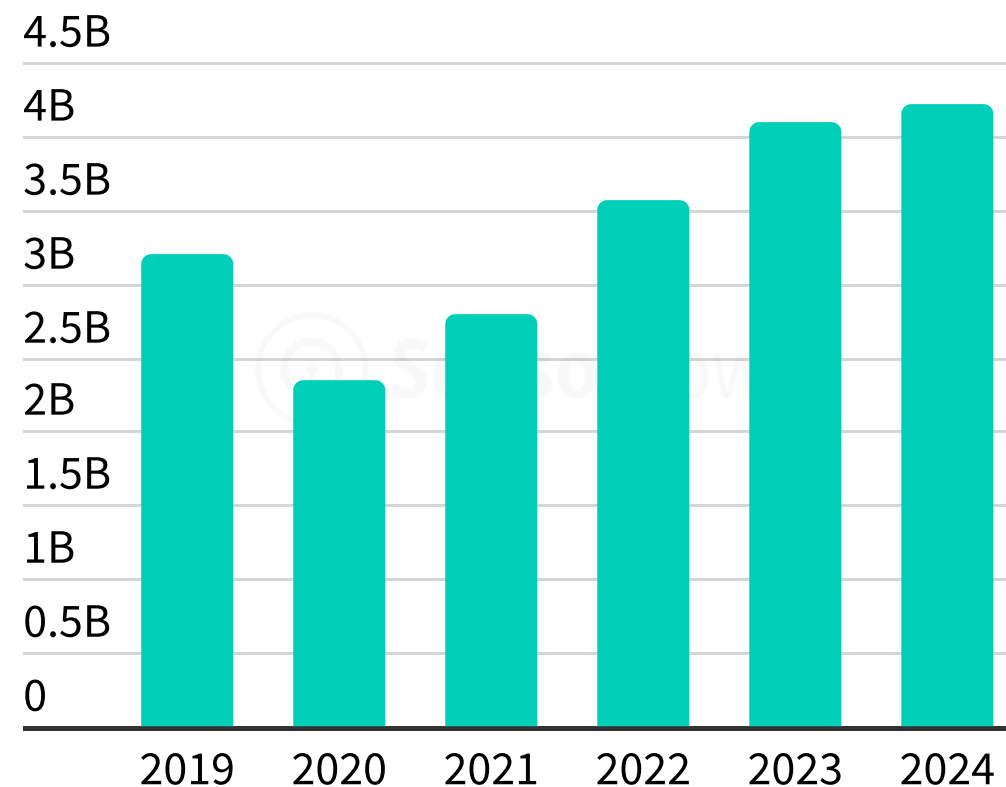
Download our [2024 Travel Apps and Brands Market Insights report!](#)

Source: Sensor Tower
 Note: iOS and Google Play combined. iOS only for China. Travel apps classified using Sensor Tower's taxonomy as of January 5, 2025.

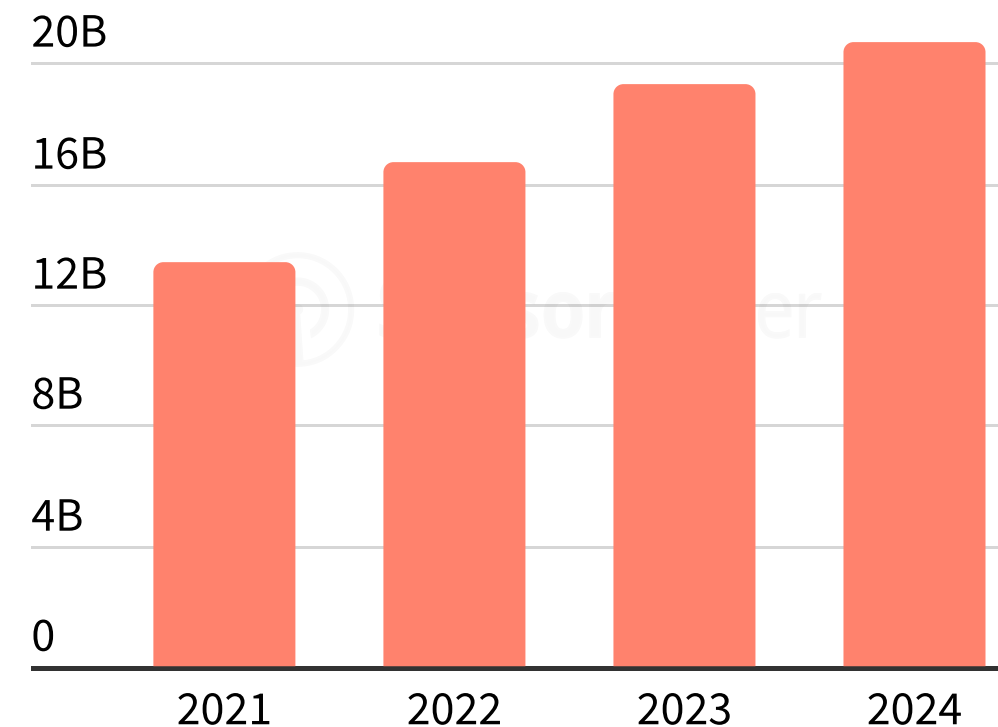
Yearly Trends for Travel Apps



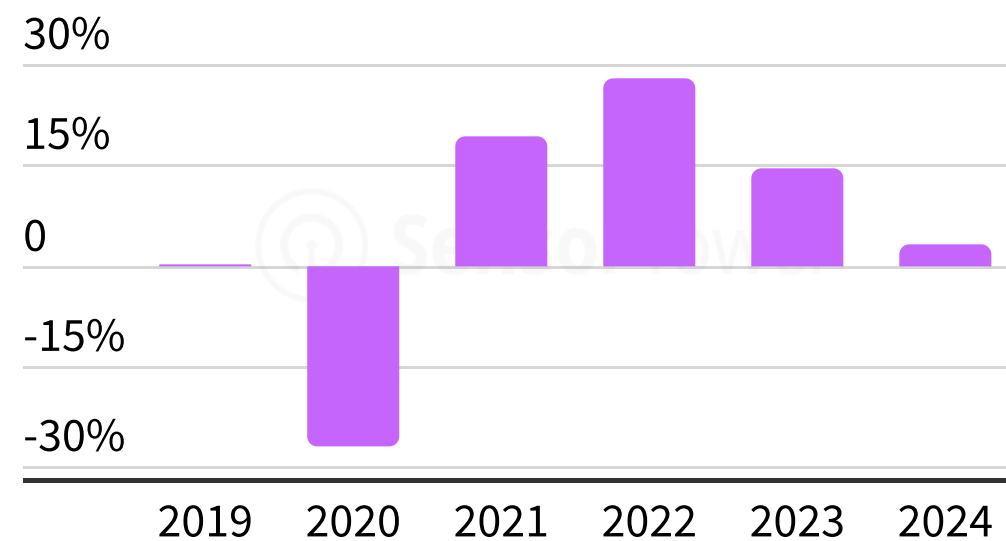
Downloads



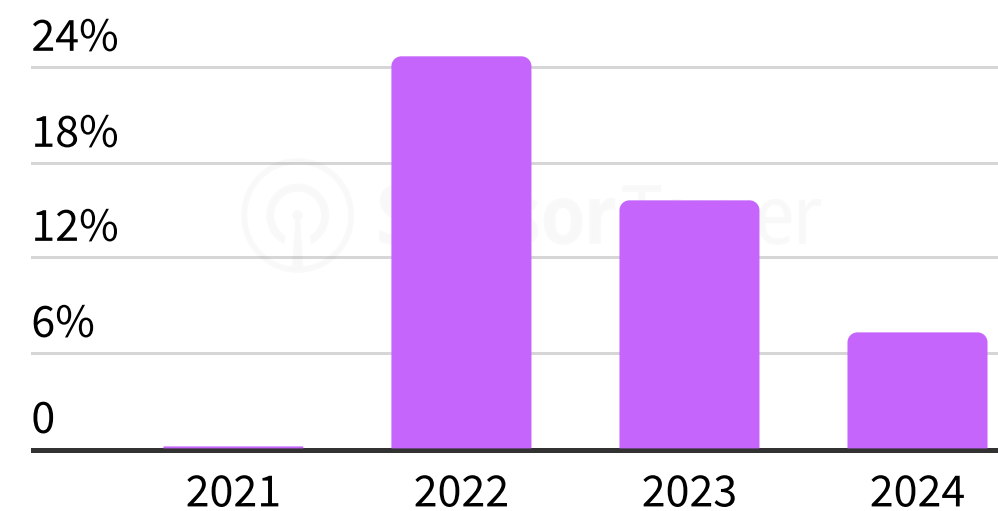
Time Spent (Hours)



YoY Growth



YoY Growth



Transportation and Tourism Apps Alike Reach New Highs

As global travel patterns settle in after a few turbulent years, several transportation subgenres have maintained strong growth for mobile adoption. Mobile apps are a convenient way for travelers to plan trips, buy and scan tickets, and more. Bus & Rail Services downloads were up 2% YoY and 44% from 2019 before the pandemic, while Airline apps achieved 5% growth YoY and 51% from 2019.

Navigation & Maps maintained its position as the top Travel subgenre by quarterly downloads. The subgenre felt a relatively minor impact from the pandemic and has maintained modest YoY growth since.

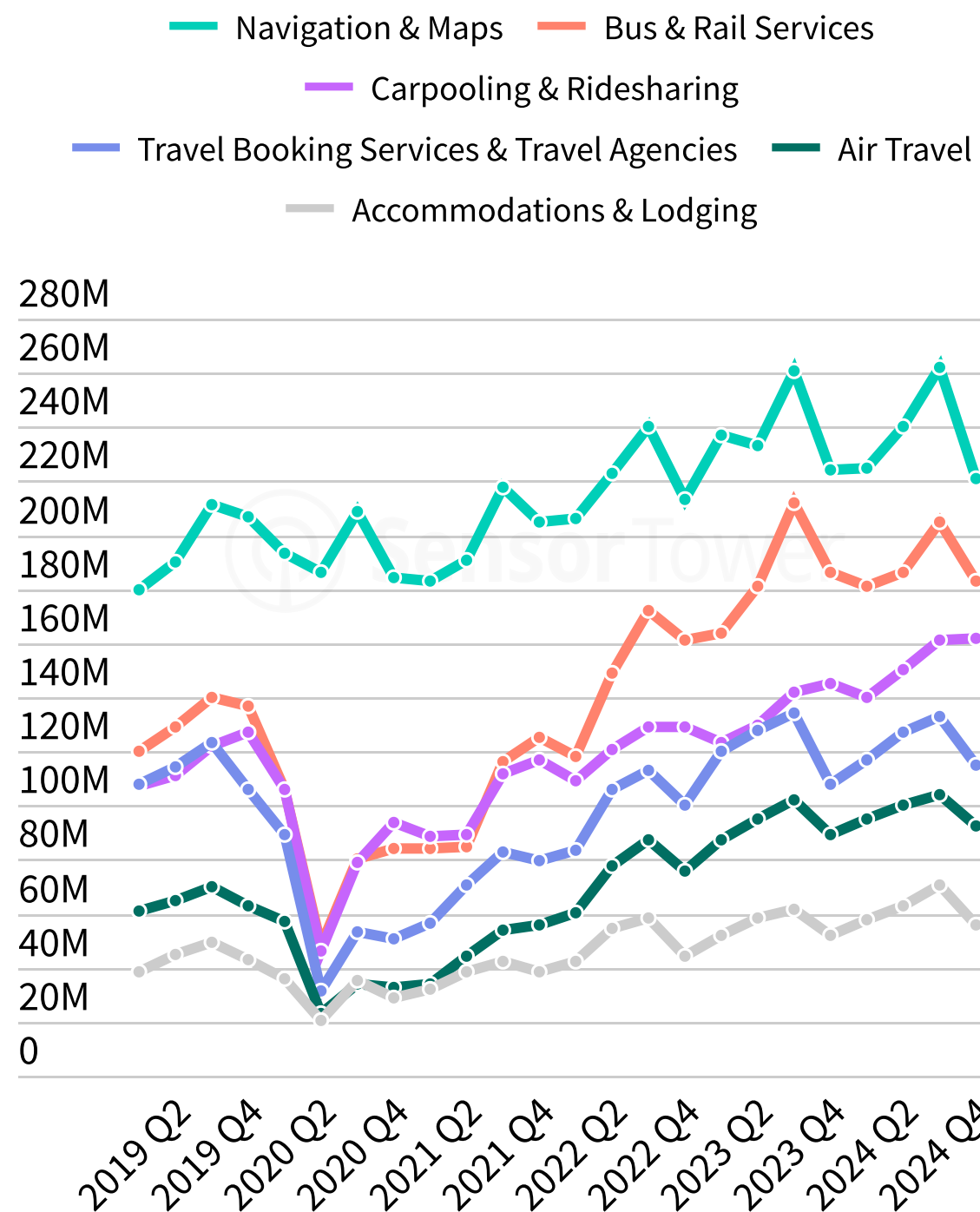
The Travel app market is also clearly impacted by seasonal patterns. For example, demand spikes in Europe during the summer months, making this time of year particularly important for travel brands to market their services and compete for users.

Source: Sensor Tower
 Note: iOS and Google Play combined. iOS only for China. Travel apps classified using Sensor Tower's taxonomy as of January 5, 2025.

Travel Download Trends by Subgenre

< Worldwide >

Quarterly Downloads by Subgenre



Top Apps by Downloads in 2024

Rank	App	Subgenre
1	Google Maps	Navigation & Maps
2	Uber	Carpooling & Ridesharing
3	Where is my Train	Bus & Rail Services
4	Waze	Navigation & Maps
5	inDrive	Carpooling & Ridesharing
6	Airbnb	Accommodations & Lodging
7	Booking.com	Travel Booking Services & Travel Agencies
8	DiDi Rider	Carpooling & Ridesharing
9	Bolt	Carpooling & Ridesharing
10	Rapido	Carpooling & Ridesharing

Travel Advertisers Amplify YouTube Investment

In 2024, Travel advertisers shifted ad spending from OTT platforms to YouTube, which accounted for 59% of their video ad budget, up 7 percentage points (ppts) from 2023. The Accommodations & Lodging sector notably redirected 14 ppts to YouTube, with major players like Airbnb and Expedia (Vrbo) increasing their investments by 112% and 162%, respectively. This shift highlights YouTube's increasing influence in effectively engaging travel audiences, making it a key platform for advertisers in the sector.

Sensor Tower Audience Insights data show that more than 90% of world travelers, hotel hoppers, and frequent flyers in the US accessed YouTube in Q4 2024, far exceeding Netflix (less than 50%), Hulu (less than 25%), and Peacock (less than 20%). This highlights YouTube's dominance among travel-focused audiences and helps explain the growing ad investment shift from OTT platforms to YouTube. For a much more detailed look at the latest social and OTT advertising trends, check out [our free State of Digital Advertising report](#).

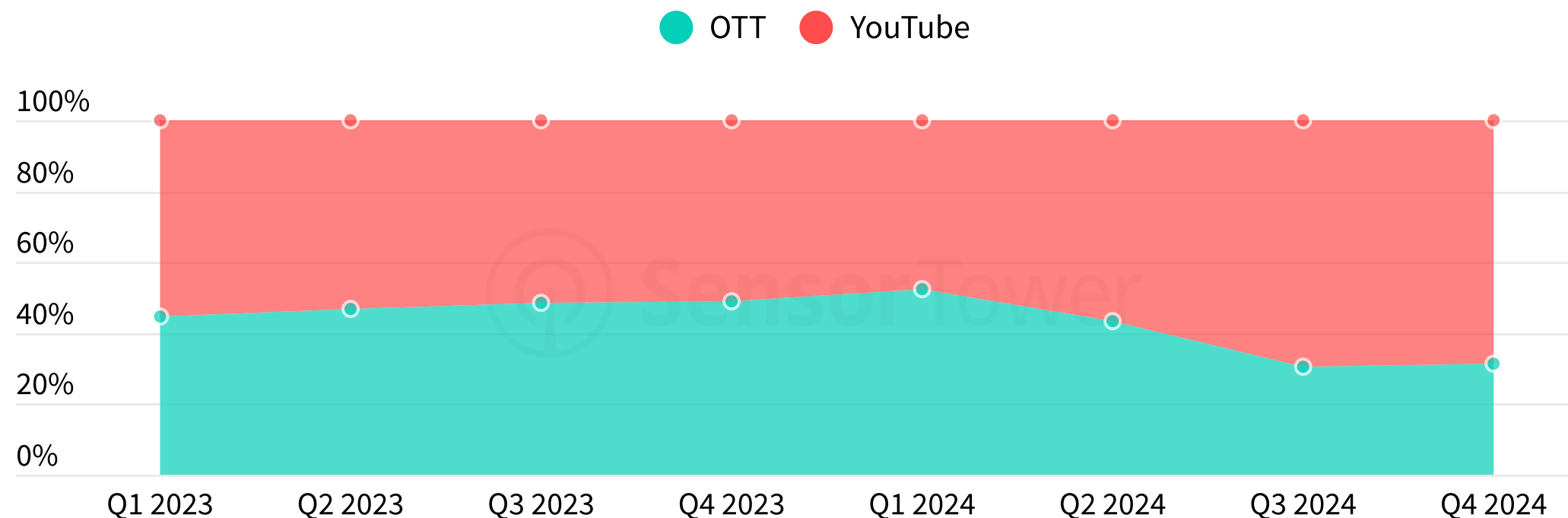
More than Mobile

Sensor Tower provides insights across the digital ecosystem, including digital advertising with [Pathmatics by Sensor Tower](#), and detailed user behavior analysis with [Audience Insights](#).

Source: Sensor Tower
 Note: Travel advertisers classified using Sensor Tower's taxonomy as of January 5, 2025. Persona usage data are Android only in the United States.

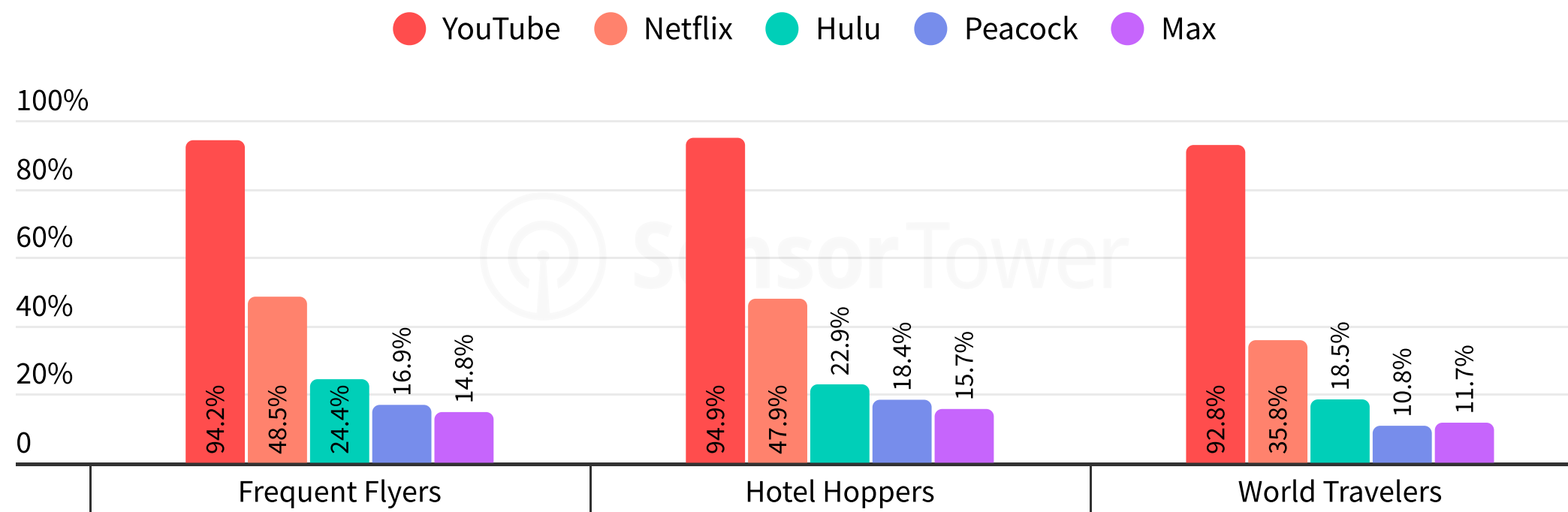
Travel Advertisers' Video Ad Spend Allocation

OTT vs YouTube in the United States

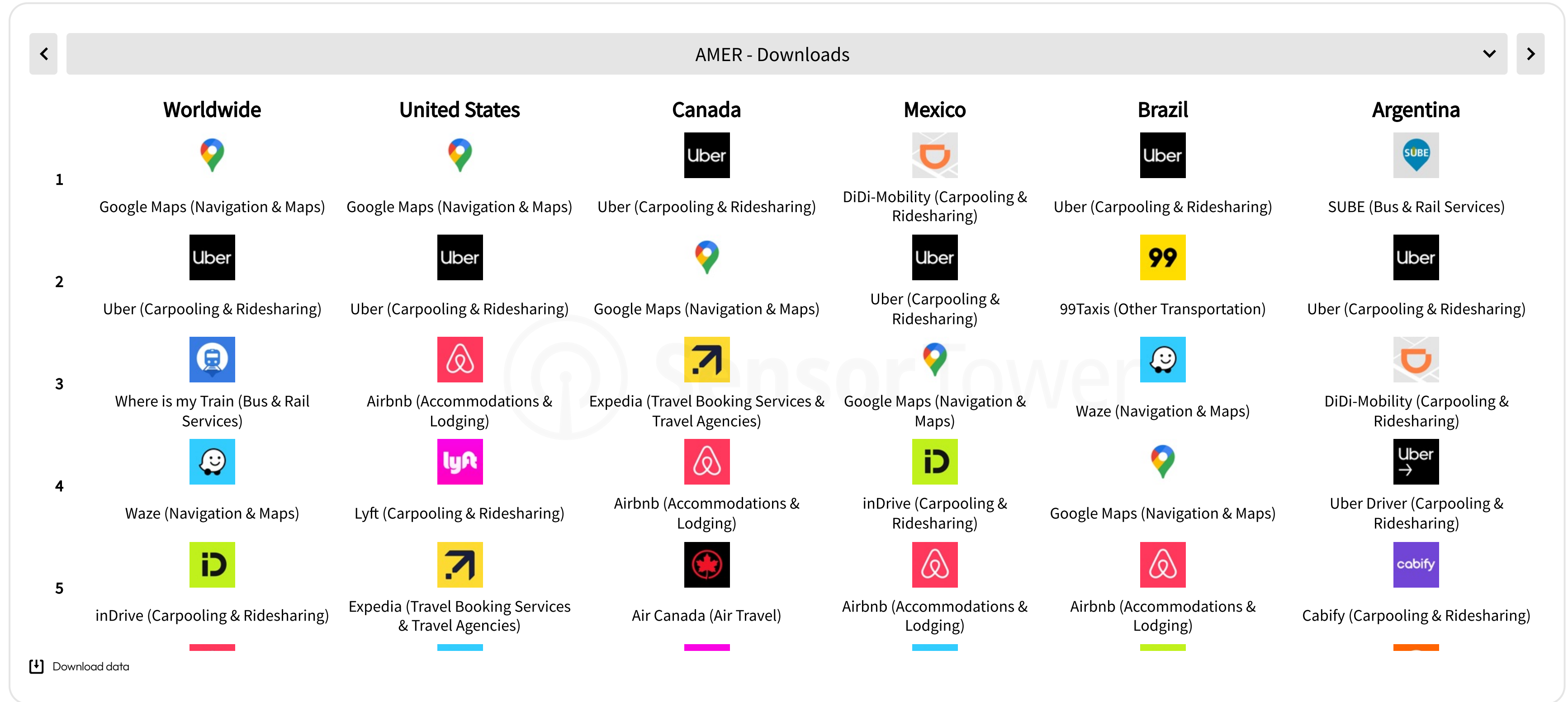


% of Selected Persona Using YouTube vs. Select Streaming Services

in Q4 2024, United States



2024 Rankings by Market | Travel



Source: Sensor Tower
 Note: iOS and Google Play combined. iOS only for China. Apps classified using Sensor Tower's taxonomy as of January 5, 2025.

10

Health and Fitness

Health & Fitness apps saw a resurgent year in 2024. Consumers have embraced personalized workout and fitness apps for years — now they turn to mobile apps for personalized healthcare too.

Calm

myfitnesspal™

 Sleep Cycle

 paired

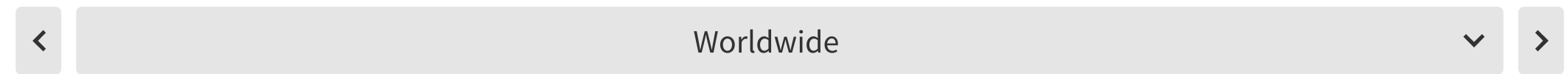
2024 Was a Resurgent Year for Mobile Health & Fitness

While downloads of Health & Fitness apps have remained stable since 2020, IAP revenue in this category has consistently grown across all major subgenres in recent years. The United States was the top market, capturing over half of global consumer spending in 2024, and there was a significant gap with the second-largest market, the UK, which accounted for an 8% revenue share.

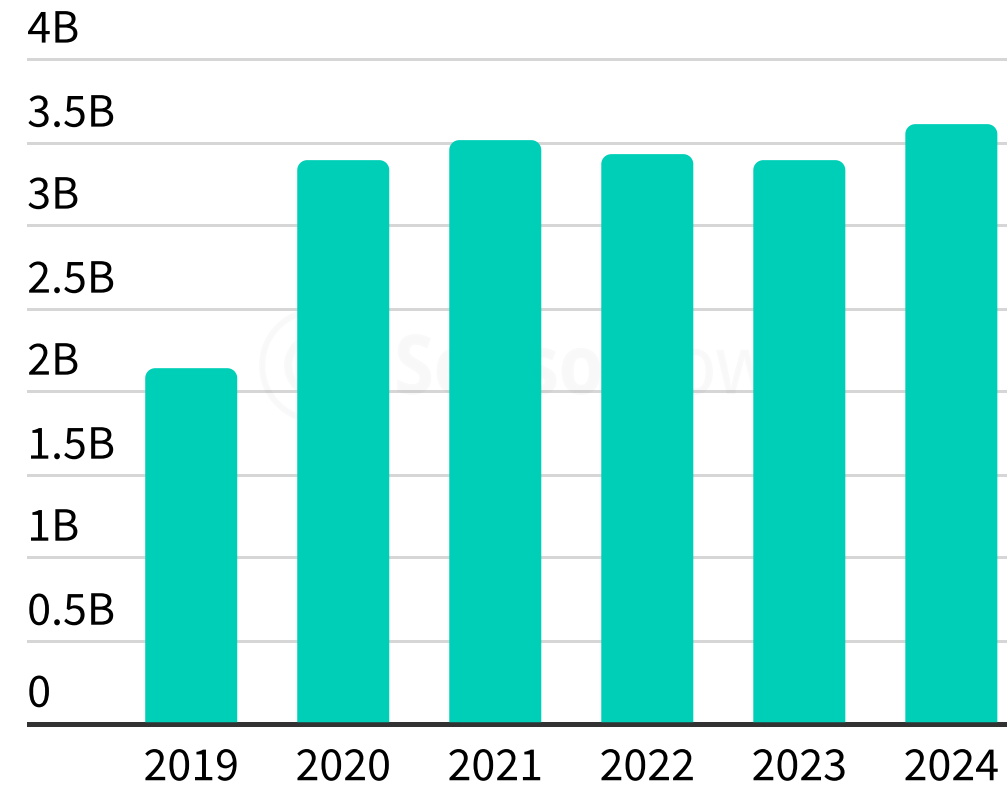
Within this category, the top subgenre, Gym & Fitness apps, accounted for 28% of total revenue and achieved 18% YoY growth in 2024. This reflects a broader shift towards digital fitness solutions for outdoor exercise, in addition to the convenience of home gym setups.

Source: Sensor Tower
 Note: iOS and Google Play combined. iOS only for China. Revenue is gross — inclusive of any percent taken by the app stores. Health & Fitness apps classified using Sensor Tower's taxonomy as of January 5, 2025.

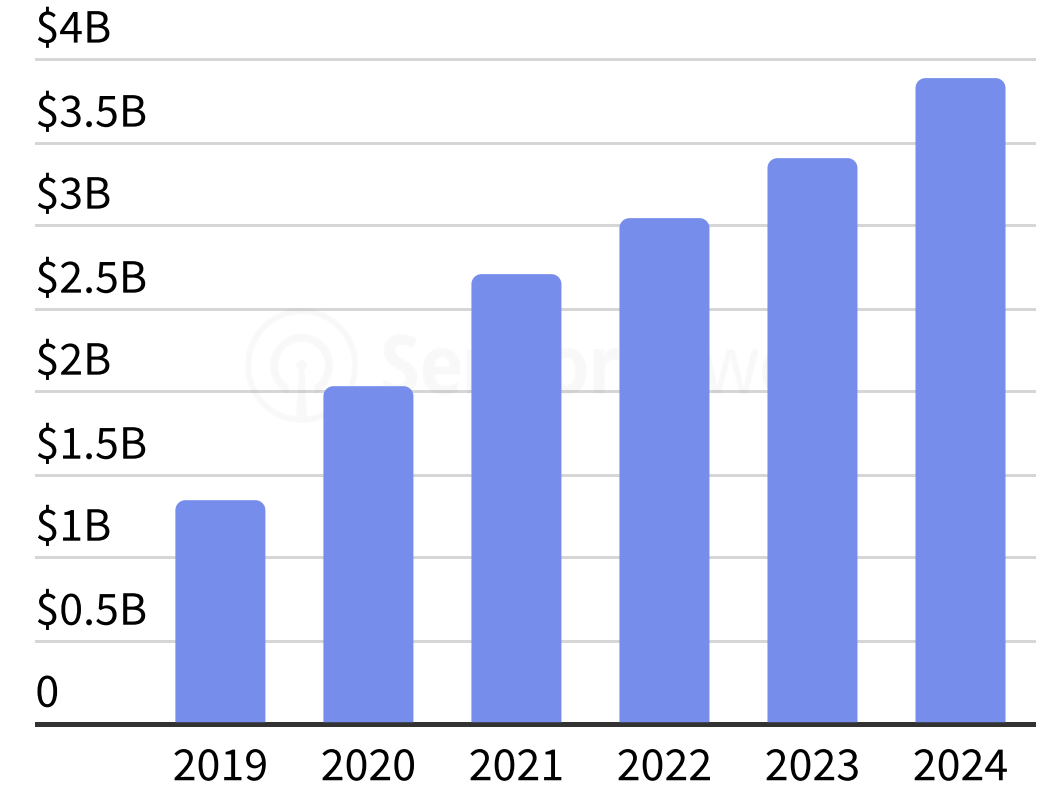
Yearly Trends for Health & Fitness Apps



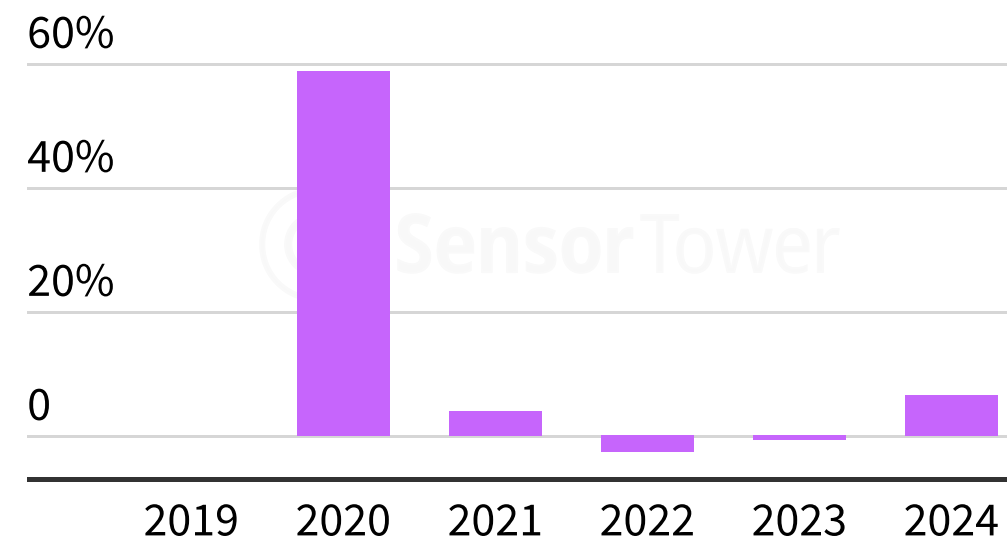
Downloads



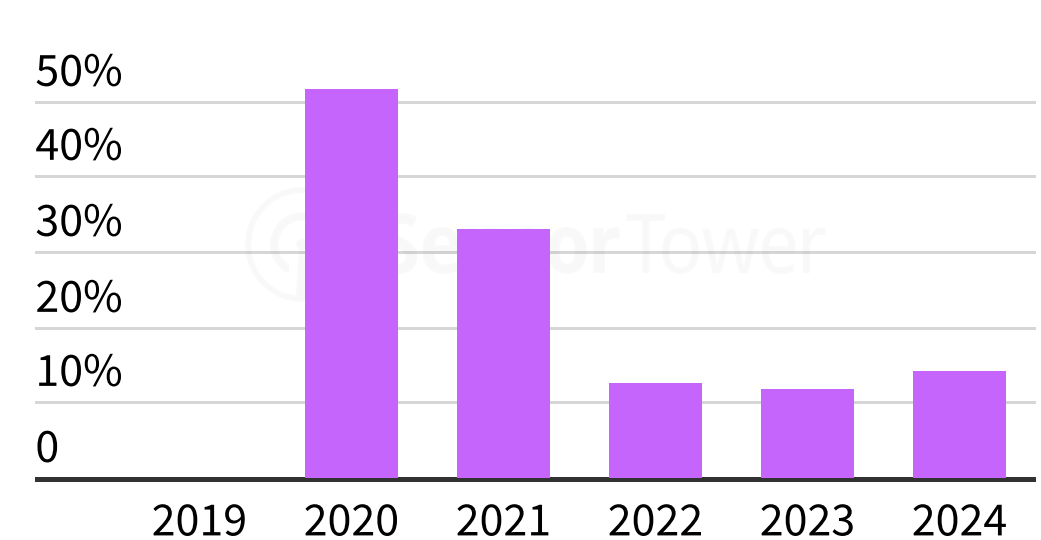
IAP Revenue



YoY Growth



YoY Growth



Medical Tracking Apps See Explosive Growth

In 2024, Gyms & Fitness retained its position as the top subgenre by downloads, experiencing moderate global growth with a 3% YoY increase. Seven of the top 10 apps by global downloads were Gyms & Fitness apps.

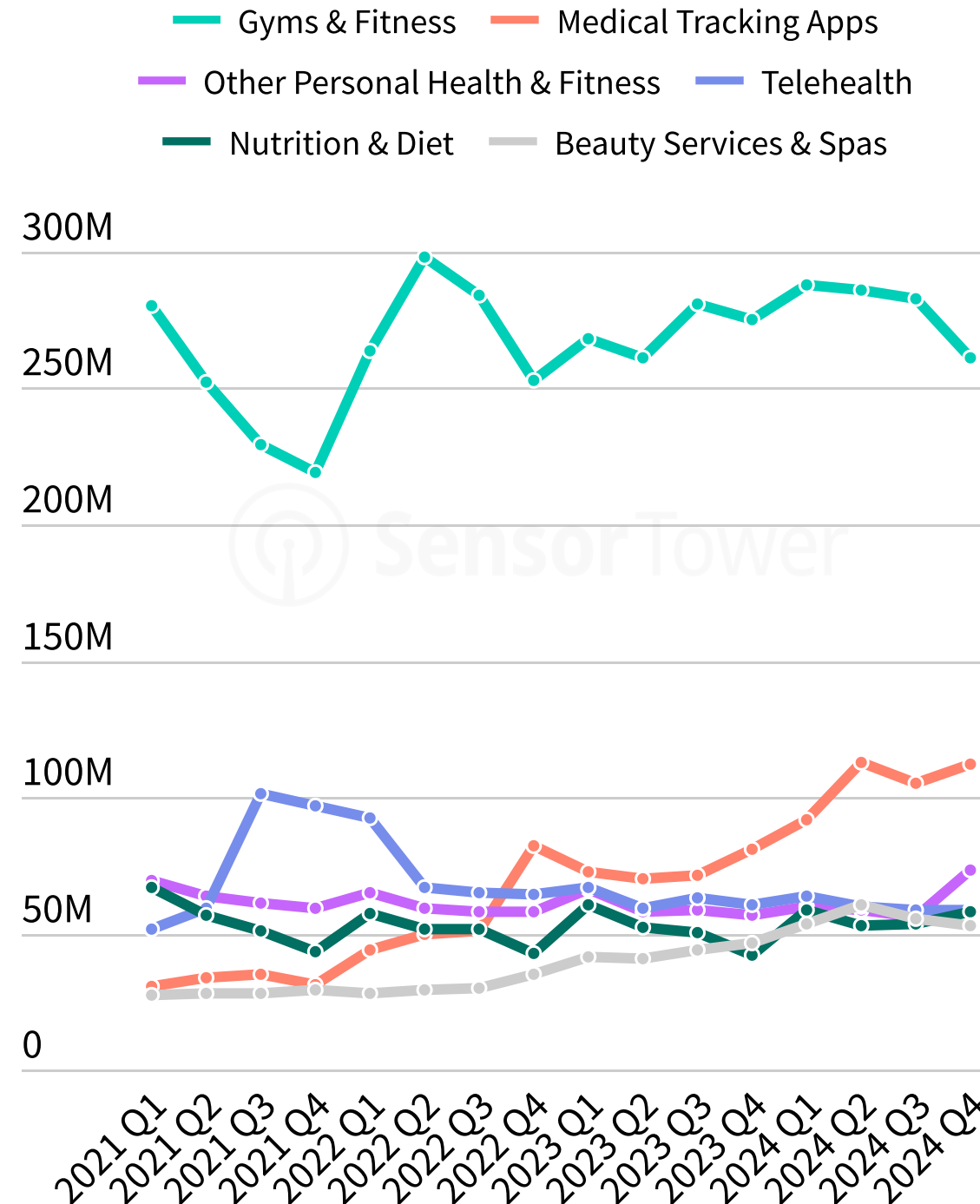
The Medical Tracking app landscape is evolving rapidly, driven by technological advancements and growing consumer awareness of personalized healthcare. In 2024, the Medical Tracking subgenre saw a remarkable 43% increase in downloads YoY. Leading this surge was Health Tracker, released at the end of 2023, which quickly acquired new users, reaching 10 million MAUs just five months post-launch and maintaining over 12 million MAUs each month thereafter.

Source: Sensor Tower
 Note: iOS and Google Play combined. iOS only for China. Health & Fitness apps classified using Sensor Tower's taxonomy as of January 5, 2025.

Health & Fitness Download Trends by Subgenre

< Worldwide >

Quarterly Downloads by Subgenre



Top Apps by Downloads in 2024

Rank	App	Subgenre
1	Flo	Period Tracking
2	Health Tracker	Medical Tracking Apps
3	fitpro	Gyms & Fitness
4	Sweatcoin	Gyms & Fitness
5	Home Workout	Gyms & Fitness
6	Mi Fitness (Xiaomi Wear)	Gyms & Fitness
7	Da Fit	Gyms & Fitness
8	Strava	Gyms & Fitness
9	Step Counter - Pedometer	Gyms & Fitness
10	Mobile JKN	National Medical Service



Competition Heating Up for Fitness Rewards Apps

Fitness tracking apps in the US have experienced significant growth in recent years, driven by increasing health awareness and a desire to stay active. Among them, apps with reward programs such as Sweatcoin, CashWalk, and WeWard, have gained popularity and stand out by incentivizing users to stay active by converting their steps into rewards.

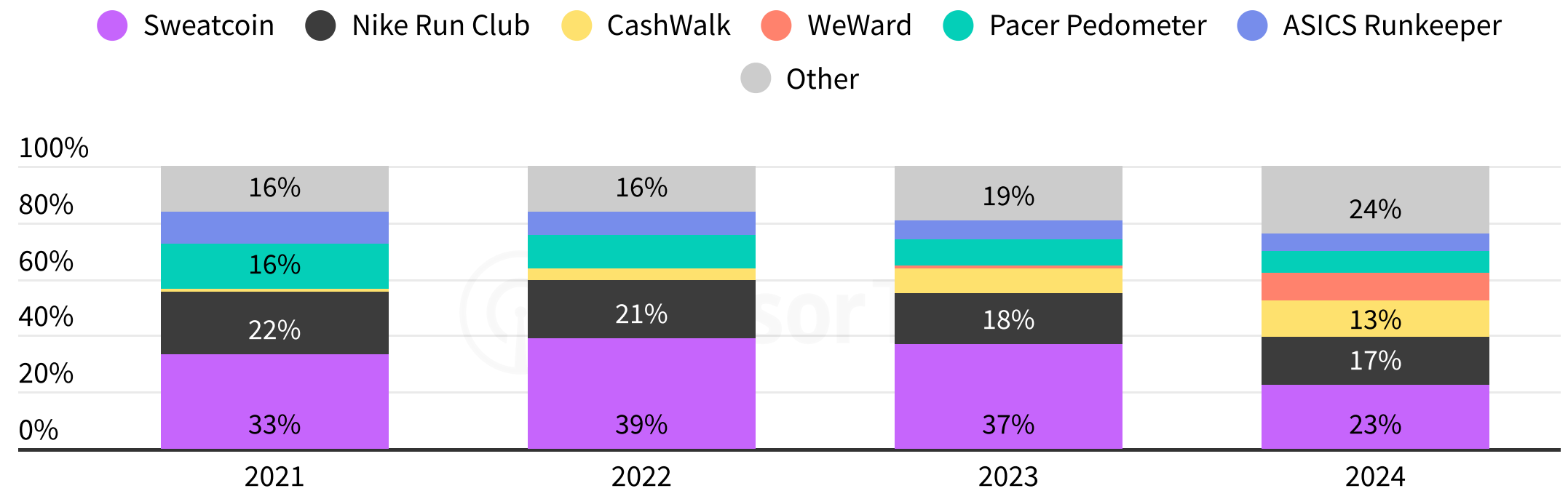
Sweatcoin continued to lead the market, holding nearly a quarter of the MAU market share among leading fitness tracking apps. Meanwhile, new entrants in the US such as CashWalk and WeWard are rapidly acquiring new users, with their MAUs increasing by 42% and an astounding 609% YoY in 2024, respectively.

These fitness reward apps are also efficiently retaining users, with CashWalk and Sweatcoin's 30-day retention rates remaining at 31% and 20%, respectively, while other competitors struggle to maintain similar levels of user loyalty.

Interested in Market Leading Usage Metrics?
 Sensor Tower's [Usage data offerings](#) let you benchmark by user retention, active users, time spent, and more! And [Advanced Usage](#) offerings provide even more detail, including daily granularity and even hour-by-hour usage patterns.

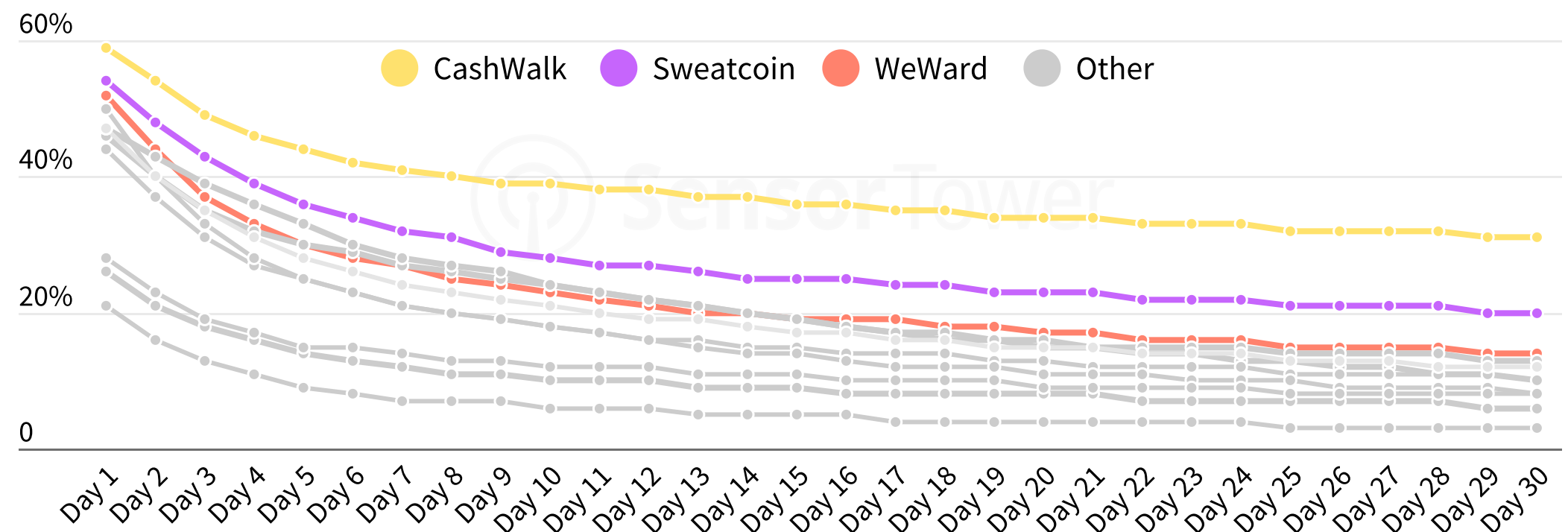
Source: Sensor Tower
 Note: iOS and Android combined. MAU market share is calculated at the app/user level (double-counts users who use multiple Walk & Run Tracking apps).. Retention is Android only.

Top Walk & Run Tracking Apps MAU Market Share iOS and Android in the United States

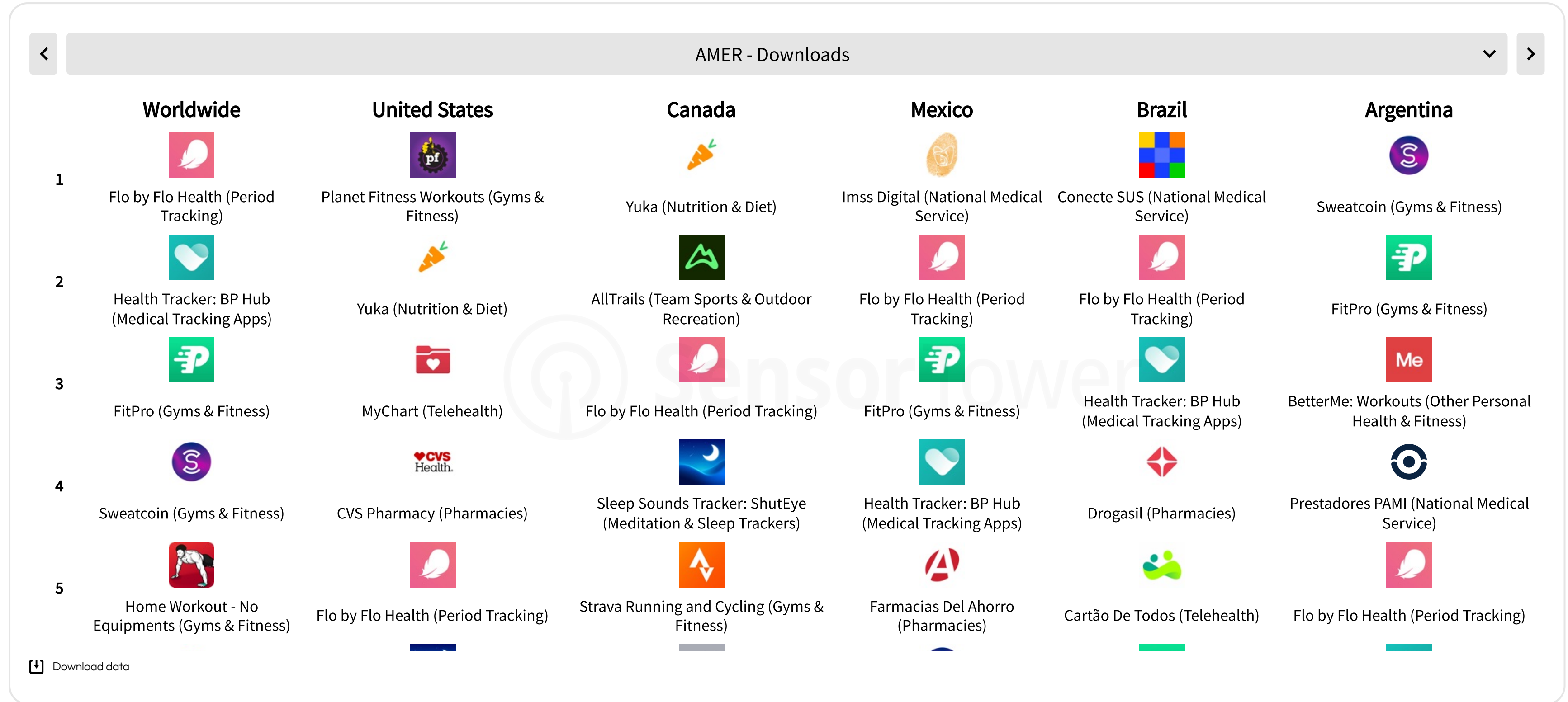


Note: Other walk & Run Tracking Apps include Step Counter - Pedometer, Step Tracker - Pedometer, FitCloudPro, Pedometer - Step Counter

Retention for Top Walk & Run Tracking Apps All-Time on Android in the United States



2024 Rankings by Market | Health & Fitness



Source: Sensor Tower
 Note: iOS and Google Play combined. iOS only for China. Apps classified using Sensor Tower's taxonomy as of January 5, 2025.

11

Sports

Leveraging the most popular events is the name of the game for Sports apps, from streaming to sports betting. Exclusive content can help you stand out in a competitive market.



Consumer Spend on Sports Apps Climbs Steadily

Sports app revenue on subscriptions and other in-app purchases has shown steady growth YoY as more companies place a growing emphasis on streaming niche sports and events to cater to diverse fan bases and promote inclusivity in sports viewership.

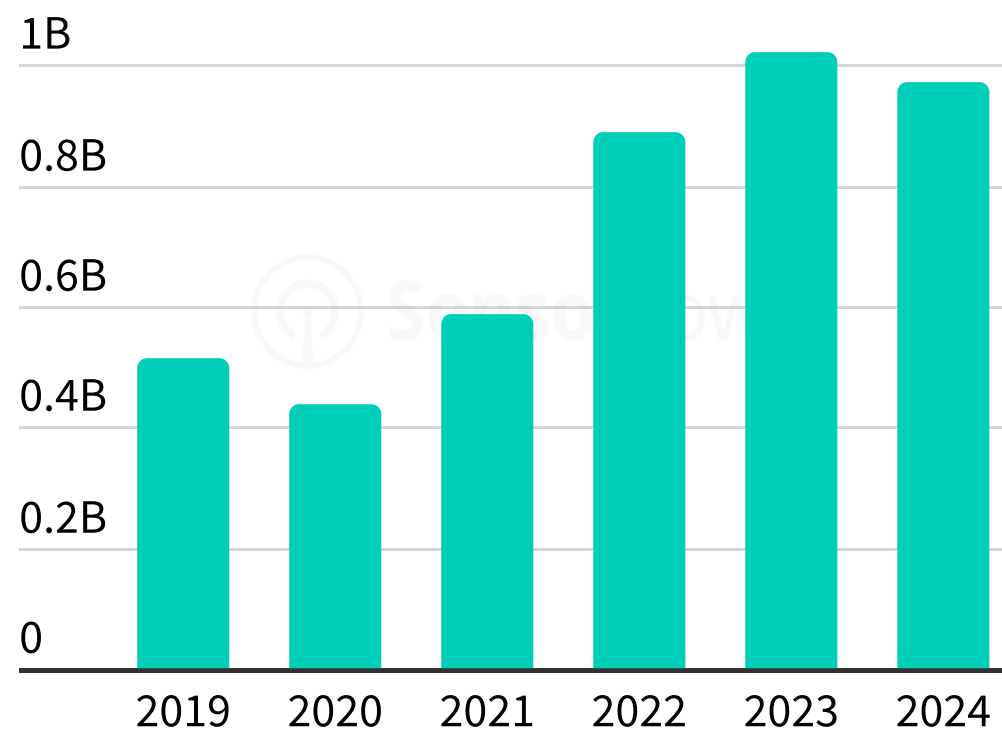
Despite steady growth in revenue, sports apps are seeing a slowdown in downloads. A [Sensor Tower analysis](#) reveals that apps are struggling to grow downloads as streaming services vie for customers by offering live sports, potentially undermining league-specific apps. In 2024, new downloads for league-specific apps like the NHL fell by 26%, NFL by 17%, NBA by 9%, and MLB by 8% YoY.

Source: Sensor Tower
 Note: iOS and Google Play combined. iOS only for China. Revenue is gross — inclusive of any percent taken by the app stores. Sports apps classified using Sensor Tower's taxonomy as of January 5, 2025.

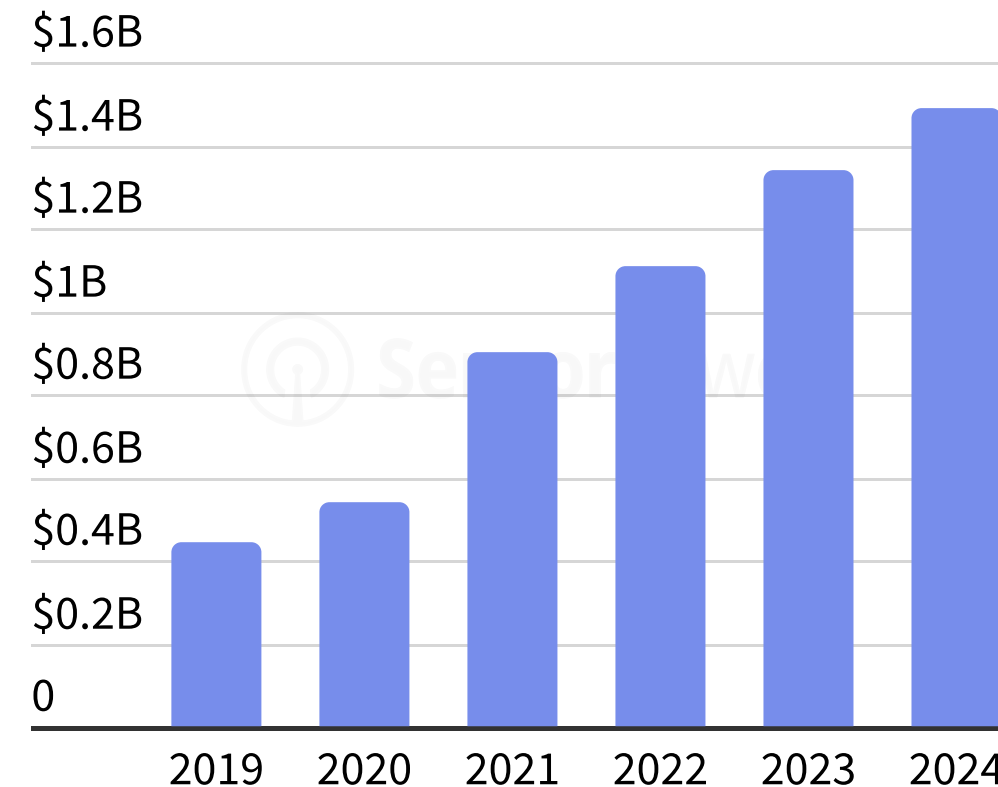
Yearly Trends for Sports Apps



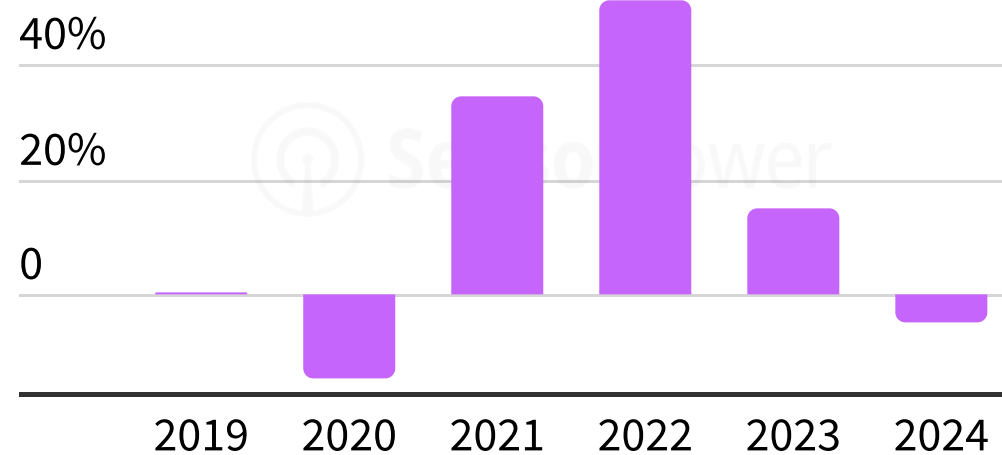
Downloads



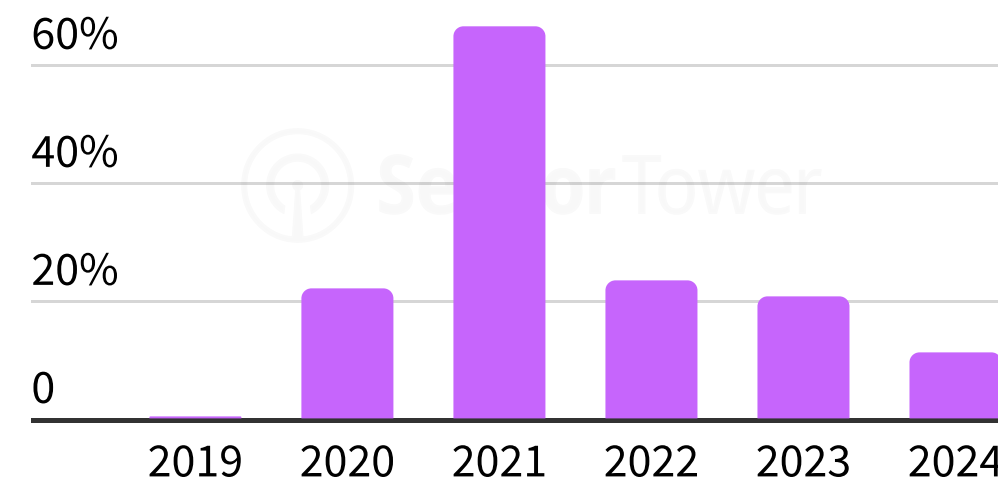
IAP Revenue



YoY Growth



YoY Growth



Sports Betting Apps Continued Their Climb in the US

Sports Entertainment maintained a wide lead over Sports Betting and Fantasy Sports in terms of global downloads. Sports Entertainment includes apps for sports streaming, news & scores, and various league apps.

Unsurprisingly, demand for top Sports apps can fluctuate wildly depending on the timing of different events and seasons. For example, Sports app downloads in India rely heavily on the cricket schedule, and downloads in France surged during the Paris Olympics.

Sports Betting app downloads in the US have only gained momentum since sports betting was legalized, climbing 19% YoY to reach 44 million in 2024. And the space is only getting more competitive — another major player entered the market in late 2023 with the launch of ESPN BET. In 2024, 12 different Sports Betting / Daily Fantasy apps had at least one million US downloads.

How Did Top Apps Leverage the Olympics?

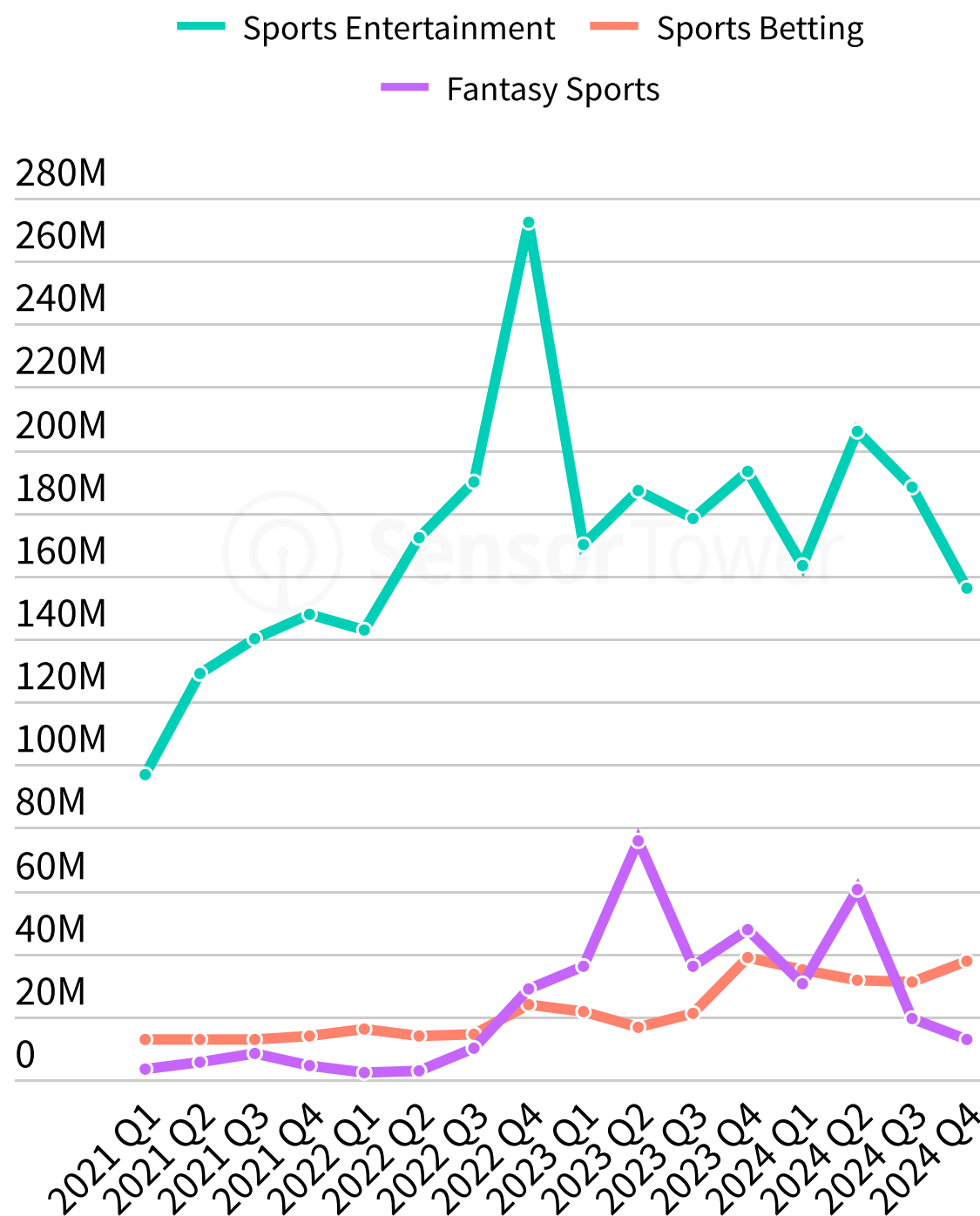
Want to learn more about how top players strategize around the world's biggest sporting events? Check out [our blog covering the Paris Summer Olympics](#).

Source: Sensor Tower
 Note: iOS and Google Play combined. iOS only for China. Sports apps classified using Sensor Tower's taxonomy as of January 5, 2025.

Sports Download Trends by Subgenre

< Worldwide >

Quarterly Downloads by Subgenre



Top Apps by Downloads in 2024

Rank	App	Subgenre
1	Dream11	Fantasy Sports
2	My11Circle	Fantasy Sports
3	Olympics	Sports Entertainment
4	Flashscore	Sports Entertainment
5	ESPN	Sports Entertainment
6	Sofascore	Sports Entertainment
7	DAZN	Sports Entertainment
8	Cricbuzz	Sports Entertainment
9	FanCode	Sports Entertainment
10	365Scores	Sports Entertainment

Sports Betting 2024 Ads: Riding the NFL Wave

To leverage the NFL's vast viewership in 2024, leading Sports Betting apps FanDuel and DraftKings significantly ramped up their marketing efforts around NFL content. Their NFL ad impression shares increased by 3 and 10 percentage points (ppt) on average from 2023, respectively, reaching 67% for FanDuel and 80% for DraftKings.

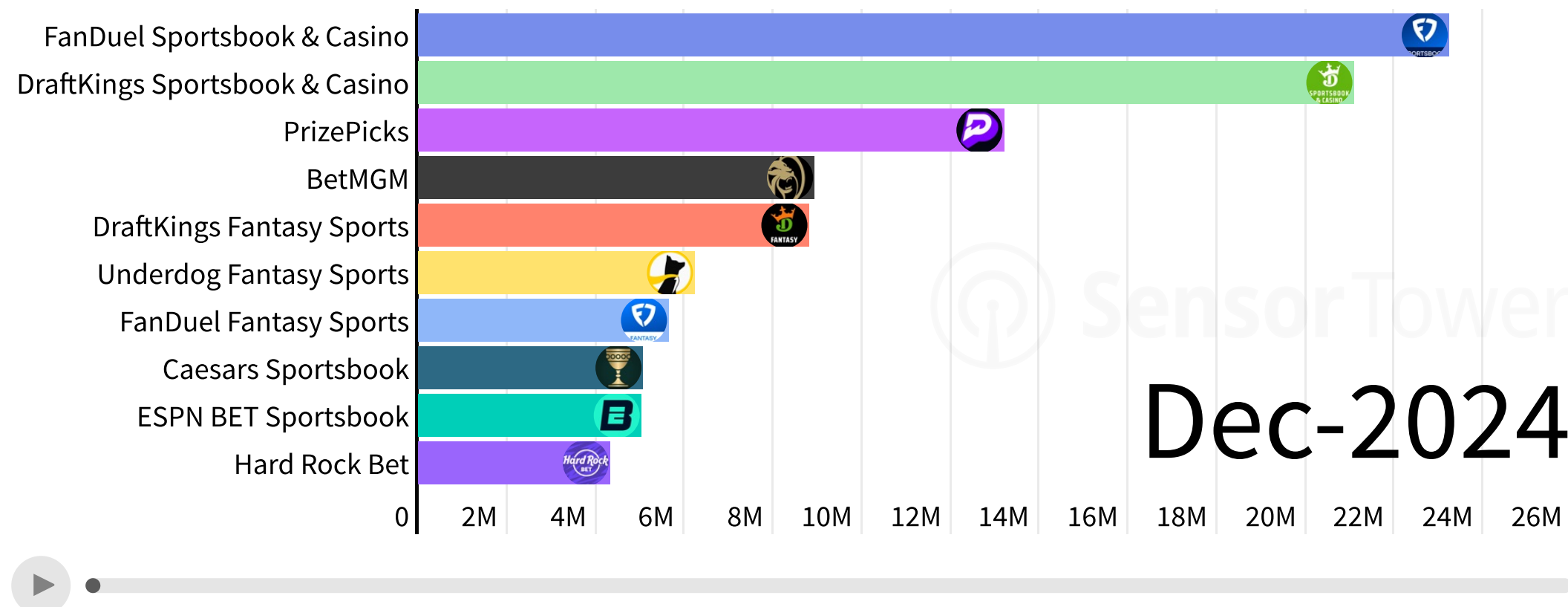
BetMGM shifted its advertising strategy in 2024, reducing its NFL focus to better engage NBA and MLB fans. This change led to a 36 ppt drop in NFL ad impressions, while NBA and MLB impressions grew by 15 and 13 ppt, respectively. This pivot underscores BetMGM's aim to diversify its audience and tap into the rising interest in basketball and baseball.

Uncover the Latest Marketing Strategies

[Pathmatics by Sensor Tower](#) lets you track the latest digital advertising trends for sports betting apps. Discover which ad channels top apps are prioritizing and how creative strategies are evolving.

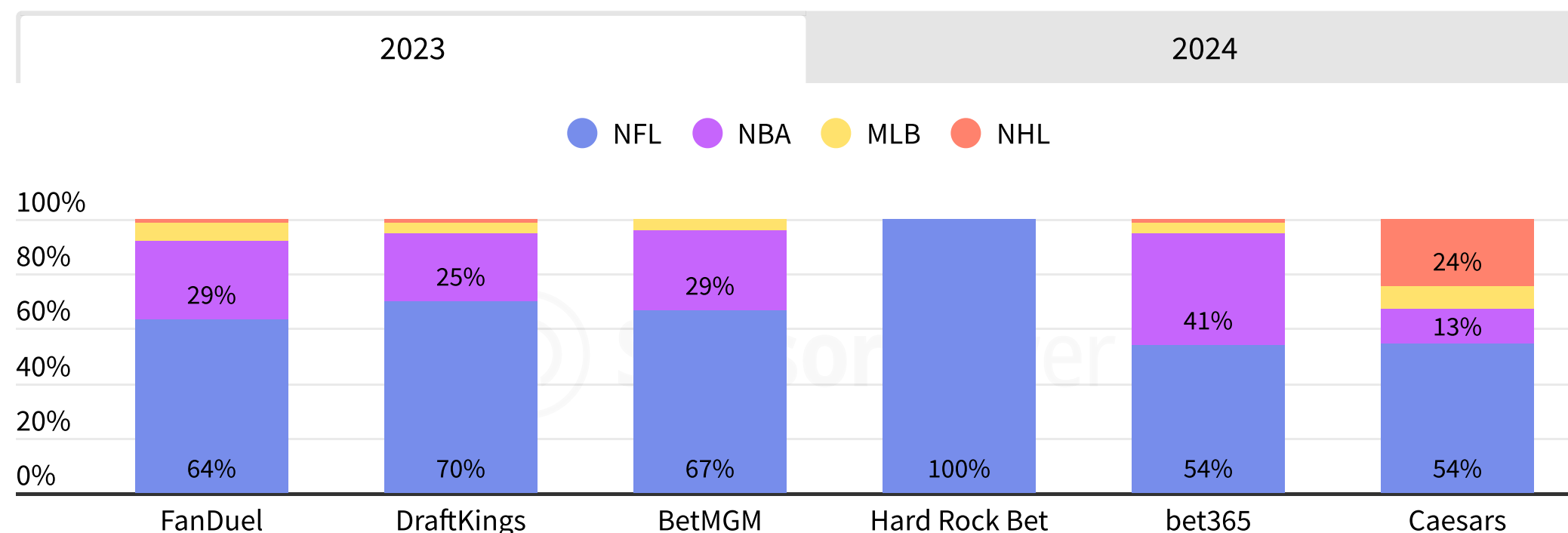
Source: Sensor Tower
 Note: Downloads on iOS and Google Play combined. Ad impressions estimates as of January 5, 2025. Includes ads on connected TVs, streaming devices (e.g., Apple TV, PlayStation, Roku), and desktop and mobile devices.

Cumulative United States Downloads For Sports Betting Apps Since 2020



Share of Ad Impressions by Sport for Top Sports Betting Apps

United States



ESPN BET's Meteoric Rise in 2024

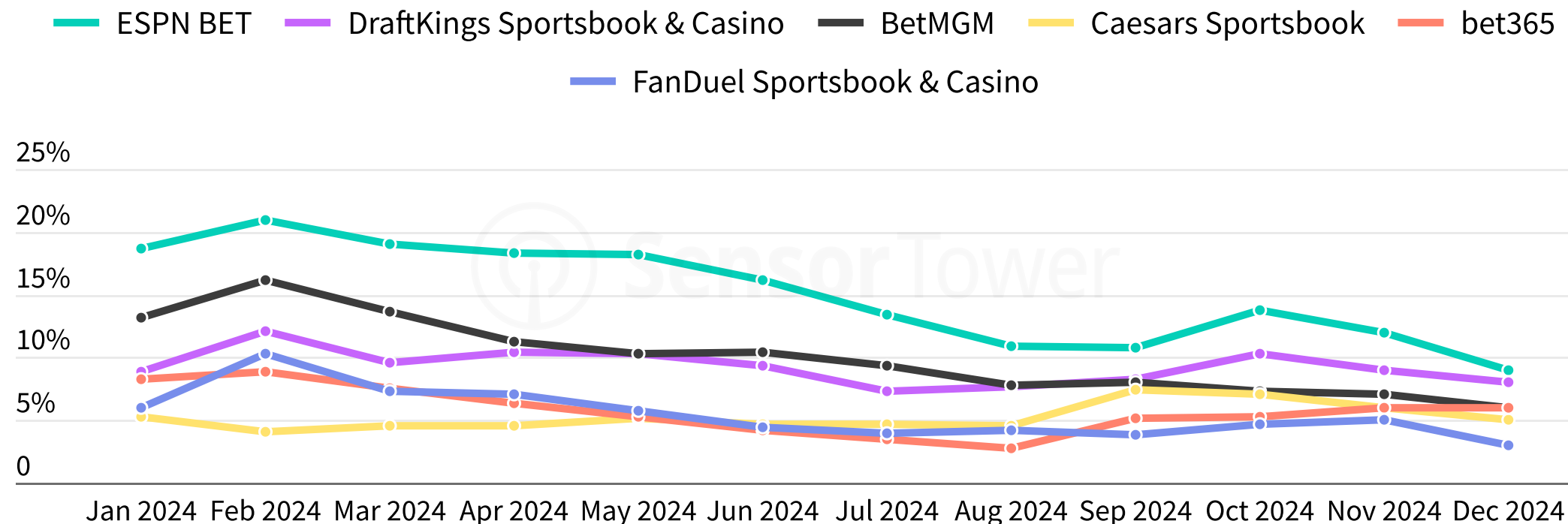
Launched in November 2023, ESPN BET quickly gained users and high engagement, with average MAUs surpassing most Sports Betting apps, trailing only behind industry leaders DraftKings and FanDuel. This success is partly due to its investment in mobile ad networks. In 2024, 16% of ESPN BET's downloads were paid, in contrast to FanDuel's 6%, which relied more on word-of-mouth and its long-established position as a leader in the space.

Social media advertising on platforms like Facebook, Instagram, and Snapchat has been crucial to ESPN BET's early success in sports betting. Strong share of voice (SOV) correlations with downloads—0.84 for Snapchat, 0.73 for Facebook, and 0.73 for Instagram—indicate that targeted ads on these platforms significantly drove download growth.

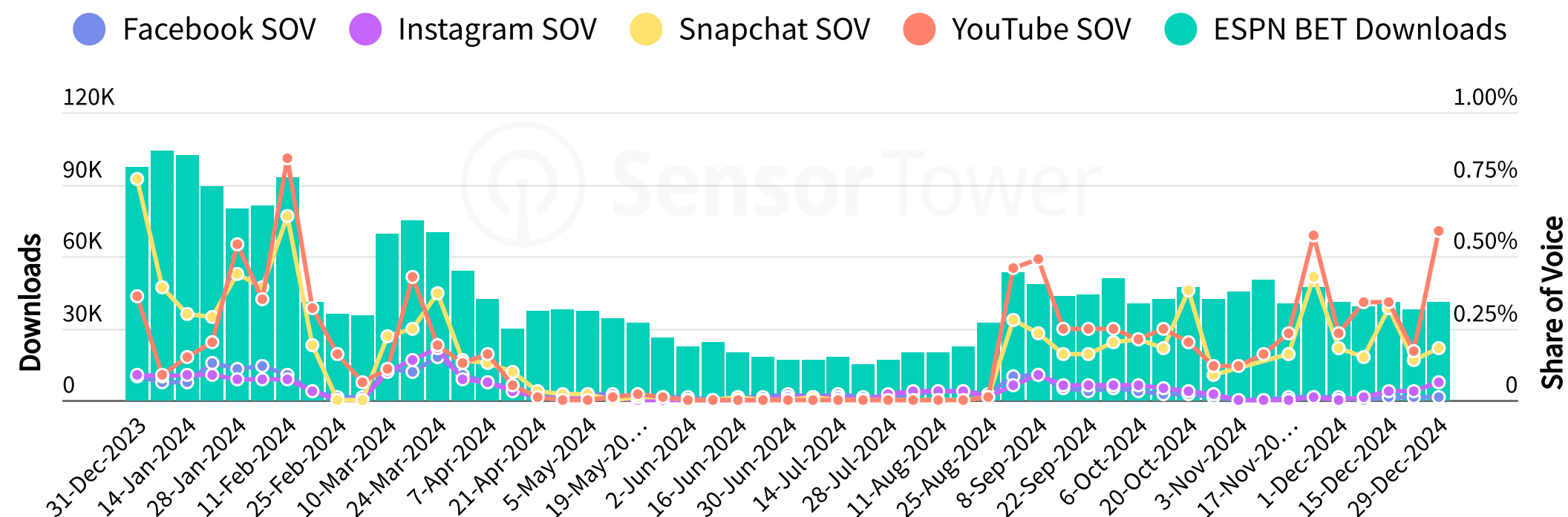
Is Your Competitors' Growth Paid or Organic?
 Want to see what share of downloads are from paid vs. organic channels in your space? Sensor Tower customers can [try it out for themselves here!](#) Not a customer? [Request a demo](#) to see how Sensor Tower data can help your business.

Source: Sensor Tower
 Note: Downloads on iOS and Google Play combined. Share of voice across iOS and Google Play combined among mobile app advertisers on each ad network.

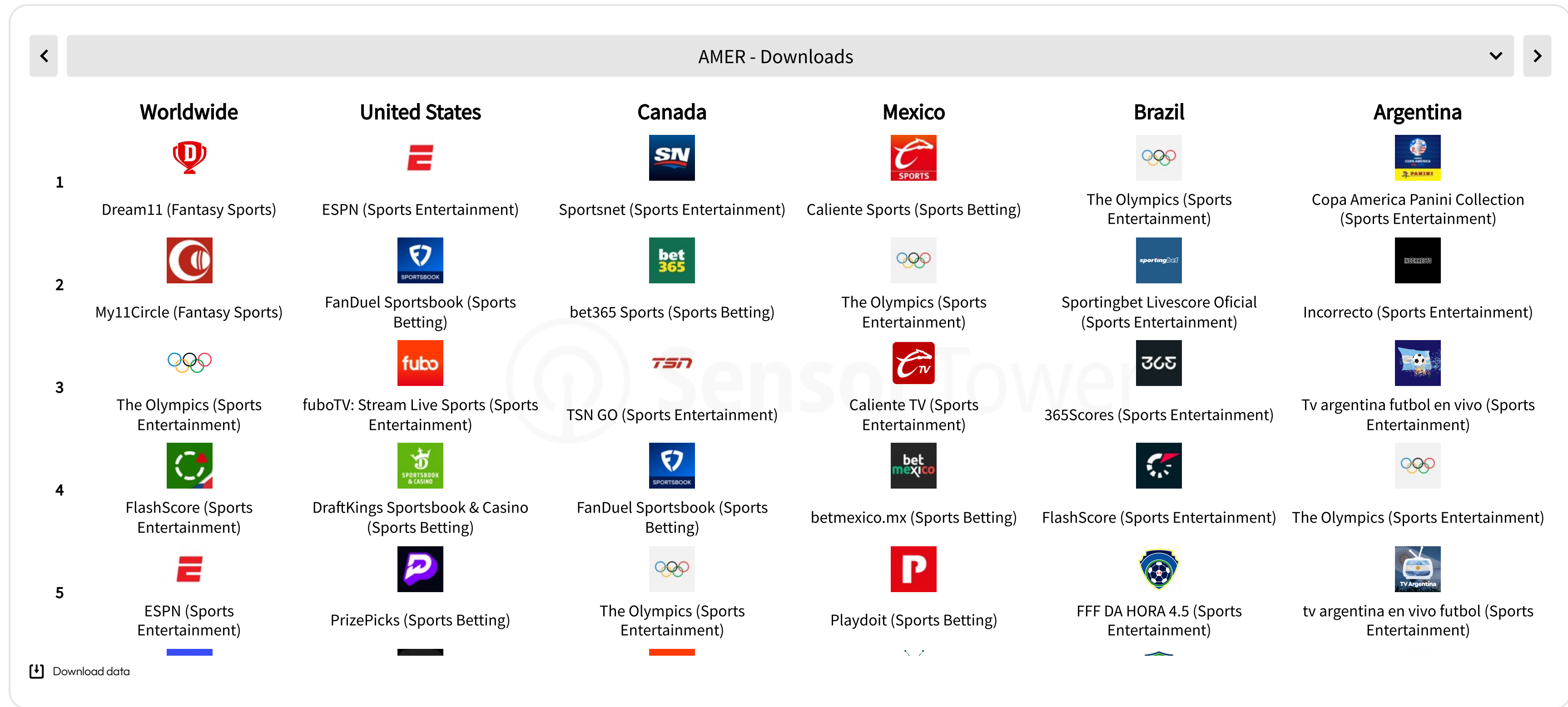
Monthly Share of Sports Betting App Downloads from Paid Ads United States



ESPN BET Weekly Downloads vs. Advertising Share of Voice (SOV) Across Top Social Networks United States



2024 Rankings by Market | Sports



Source: Sensor Tower
 Note: iOS and Google Play combined. iOS only for China. Apps classified using Sensor Tower's taxonomy as of January 5, 2025.

12

Top Apps and Games

See the mobile leaders by downloads, IAP revenue, and monthly active users in 2024 across 20+ markets

“

At CrazyLabs, we successfully embraced our transition to hybrid-casual gaming, aligning with evolving market trends. This strategic shift enabled us to craft more engaging player experiences while developing a robust pipeline of innovative titles. Our multiple successful game launches this year demonstrate our team's agility and dedication to delivering compelling content that resonates with today's players.



Sagi Schliesser
CEO & Founder
Crazy Labs



2024 Rankings by Market | Top Apps



Worldwide			Worldwide			Worldwide		
DOWNLOADS			IAP REVENUE			MONTHLY ACTIVE USERS		
App Name	Change	Taxonomy	App Name	Change	Taxonomy	App Name	Change	Taxonomy
1 Instagram	=	Social Media	1 TikTok	=	Social Media	1 YouTube	=	Social Media
2 TikTok	=	Social Media	2 YouTube	=	Social Media	2 Chrome Browser	=	Browsers
3 WhatsApp Messenger	▲	Social Messaging	3 Google One	=	Cloud Storage	3 Facebook	=	Social Media
4 Facebook	▼	Social Media	4 Disney+	=	Film & Television Streaming	4 WhatsApp Messenger	=	Social Messaging
5 Temu	▲	Shopping	5 Tinder	=	Dating	5 Google	=	Browsers
6 CapCut	▼	Video Editing	6 Tencent Video	=	Film & Television Streaming	6 Instagram	=	Social Media
7 Telegram	▼	Social Messaging	7 Max: Stream HBO, TV, & Movies	▲	Film & Television Streaming	7 Gmail	=	Email
8 Threads	▲	Social Media	8 iQIYI	▼	Film & Television Streaming	8 TikTok	▲	Social Media
9 Spotify	=	Music & Podcasts	9 LinkedIn	▲	Jobs & Education	9 Facebook Messenger	▼	Social Messaging
10 ChatGPT	▲	AI Chatbots	10 Bumble App	▼	Dating	10 Google Photos	=	Photo Galleries

Source: Sensor Tower
 Note: iOS and Google Play combined. iOS only for China. Apps classified using Sensor Tower's taxonomy as of January 5, 2025.

2024 Rankings by Market | Top Games



Worldwide			Worldwide			Worldwide		
DOWNLOADS			IAP REVENUE			MONTHLY ACTIVE USERS		
App Name	Change	Taxonomy	App Name	Change	Taxonomy	App Name	Change	Taxonomy
1 Free Fire	=	Shooter Battle Royale	1 MONOPOLY GO!	▲	Casino Coin Looters	1 ROBLOX	=	Simulation Sandbox
2 ROBLOX	▲	Simulation Sandbox	2 Honor of Kings	▼	Strategy MOBA	2 Free Fire	=	Shooter Battle Royale
3 Block Blast Adventure Master	▲	Puzzle Block	3 Royal Match	▲	Puzzle Match Swap	3 Subway Surfers	=	Arcade Platformer / Runner
4 Subway Surfers	▼	Arcade Platformer / Runner	4 ROBLOX	▼	Simulation Sandbox	4 EA SPORTS FC™ MOBILE	=	Sports Realistic Sports
5 Ludo King	▼	Tabletop Board	5 Last War: Survival Game	▲	Strategy 4X Strategy	5 Brawl Stars	▲	Strategy MOBA
6 Pizza Ready	▲	Simulation Time Management	6 Candy Crush Saga	▼	Puzzle Match Swap	6 Clash of Clans	▼	Strategy Build & Battle
7 Offline Games - No Wifi Games	▲	Arcade Other Arcade	7 Whiteout Survival	▲	Strategy 4X Strategy	7 Clash Royale	▼	Strategy Real-Time Strategy
8 PUBG MOBILE	▲	Shooter Battle Royale	8 Coin Master	▼	Casino Coin Looters	8 Mobile Legends: Bang Bang	▲	Strategy MOBA
9 Royal Match	▼	Puzzle Match Swap	9 Dungeon & Fighter Mobile	▲	Action Beat 'em Up	9 PUBG MOBILE	=	Shooter Battle Royale
10 My Talking Tom 2	=	Lifestyle Virtual Pet	10 Game For Peace	▼	Shooter Battle Royale	10 Pokémon GO	▼	Geolocation Geolocation

Source: Sensor Tower
 Note: iOS and Google Play combined. iOS only for China. Apps classified using Sensor Tower's game taxonomy as of January 5, 2025.

2024 Rankings by Market | Top Publishers - Apps



Worldwide					
DOWNLOADS			IAP REVENUE		
Publisher	Change	Top Apps by Downloads	Publisher	Change	Top Apps by IAP Revenue
1 Meta Platforms (formerly Facebook, Inc.)	=	Instagram	1 Bytedance	=	TikTok
2 Google, Inc.	=	YouTube	2 Google, Inc.	=	YouTube
3 Bytedance	=	TikTok	3 Disney	=	Disney+
4 Microsoft Corporation	=	Microsoft Teams	4 Tencent	▲	Tencent Video
5 Amazon Mobile LLC	=	Amazon	5 Match Group, LLC	▼	Tinder
6 Temu	▲	Temu	6 Amazon Mobile LLC	=	Audible
7 Telegram LLC	=	Telegram	7 Warner Bros. Discovery	=	Max: Stream HBO, TV, & Movies
8 Alibaba	▼	AliExpress	8 Microsoft Corporation	=	LinkedIn
9 QR Code Scanner.	▲	PDF Reader by QR Code Scanner	9 NAVER Corporation	▲	LINE Manga
10 InShot Inc.	▼	InShot - Video Editor	10 Bumble Holding Limited	=	Bumble App

Source: Sensor Tower App Performance Insights as of January 5, 2025.
 Note: iOS and Google Play combined. iOS only for China.

2024 Rankings by Market | Top Publishers - Games



< Worldwide >

DOWNLOADS			IAP REVENUE		
Publisher	Change	Top Apps by Downloads	Publisher	Change	Top Apps by IAP Revenue
1 Azur Interactive Games Limited	=	WormsZone.io	1 Tencent	=	Honor of Kings
2 SUPERSONIC STUDIOS LTD	=	Build A Queen	2 Scopely	▲	MONOPOLY GO!
3 SayGames	=	My Perfect Hotel	3 Activision Blizzard	▼	Candy Crush Saga
4 Miniclip.com	=	Subway Surfers	4 Playrix	▼	Gardenscapes by Playrix
5 iKame	▲	Screw Puzzle: Nuts & Bolts	5 NetEase	▼	Nishuihan
6 voodoo	▲	Hole.io	6 Supercell	▲	Brawl Stars
7 Outfit7	=	My Talking Tom 2	7 Dream Games, Ltd.	▲	Royal Match
8 Embracer Group	▼	Phone Case DIY	8 Take-Two Interactive	=	Toon Blast
9 BabyBus Group	▼	Baby Panda's School Bus	9 Playtika LTD	▼	BINGO Blitz
10 ABI Games Studio	▲	Wood Nuts & Bolts Puzzle	10 miHoYo	▼	Honkai: Star Rail

Source: Sensor Tower App Performance Insights as of January 5, 2025.
Note: iOS and Google Play combined. iOS only for China.

Customer Testimonials



Among Brazilian retailers, Magalu has the largest app, offering a seamless experience with exclusive purchasing conditions, a broad seller base, and a complete ecosystem, including payments, insurance, media ads, content, and an affiliate platform. Sensor Tower is essential for benchmarking and market data, enabling us to identify opportunities, innovate, and maintain competitiveness.



Gabriela de Sousa
Acquisition Lead
Magalu



In the fast-paced gaming ecosystem, understanding the competitive landscape is key to success. SensorTower empowers us to uncover creative trends, analyze competitors' strategies, and monitor market dynamics. Whether launching a new title or optimizing an existing one, it provides invaluable insights to evaluate performance, amplify strengths, and unlock new growth opportunities.



Viktoriya Ivanova
UA Lead
Wargaming



Our company continues to achieve significant success in both product development and marketing by embracing data-driven approaches. This commitment has allowed us to refine strategies, enhance key performance metrics, and swiftly adapt to evolving market trends. For example, experiments in User Acquisition have optimized campaign efficiency and supported effective scaling. Tools like SensorTower, combined with our advanced internal analytics solutions, enable us to uncover new opportunities and drive sustainable growth in the highly competitive mobile market.



Dmitry Severinets
Head of Marketing Analytics, Co-CMO
Vizor



Customer Testimonials



As Fortune Mine Games, we are a data-obsessed startup, and data fuels everything we do. While we gather vast insights within our domain, Sensor Tower provides a powerful external lens, helping us evaluate our impact, align with product-market fit, and uncover emerging trends ripe for innovation.



Deniz Korzay
CEO
Fortune Mine Games



At AdQuantum, we specialize in scaling mobile applications and web products, helping our clients achieve outstanding results through effective performance marketing strategies. Access to accurate data and analytics plays a critical role in an increasingly competitive and privacy-first landscape. Sensor Tower provides us with valuable insights into market trends, user behavior, data on ad creatives, and app metrics across various verticals. These insights empower us to optimize advertising campaigns, enhance their efficiency, and drive sustainable growth for our partners across both mobile and web segments.



Pavel Belov
Account Director
AdQuantum

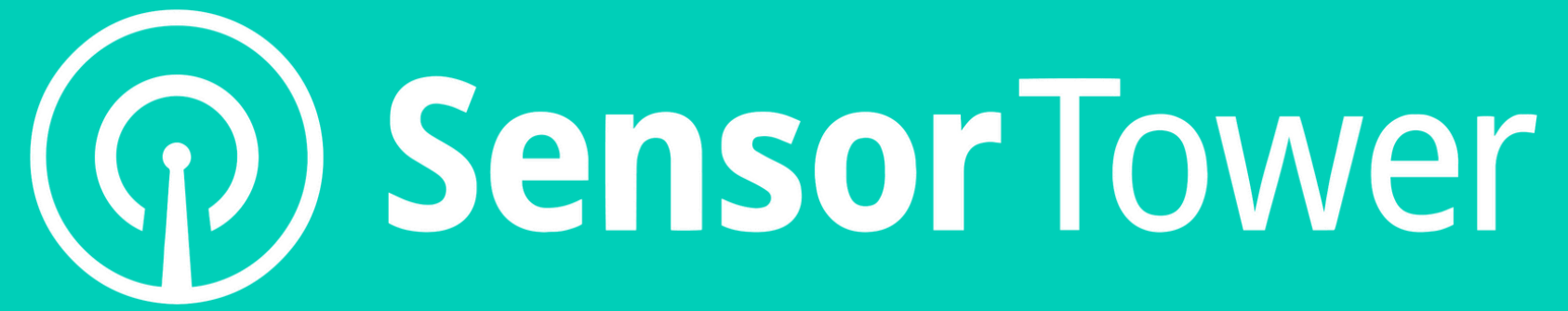


Hybrid casual is revolutionizing mobile gaming by blending the best of all game categories: the marketability and sticky core mechanics of hypercasual games with the deep systems of progression and live operations from casual and midcore genres. Only a few years after Homa co-designed the foundation of this category's definition and pillars with SensorTower, we've seen the hybrid casual category accelerate significantly in terms of new launches and revenue in 2024. SensorTower has been instrumental in helping us identify and structure this emerging category, solidifying our position as a leading player while enabling us to adapt our strategies to continue driving innovation and delivering compelling gaming experiences.



Olivier Le Bas
Co-founder
Homa





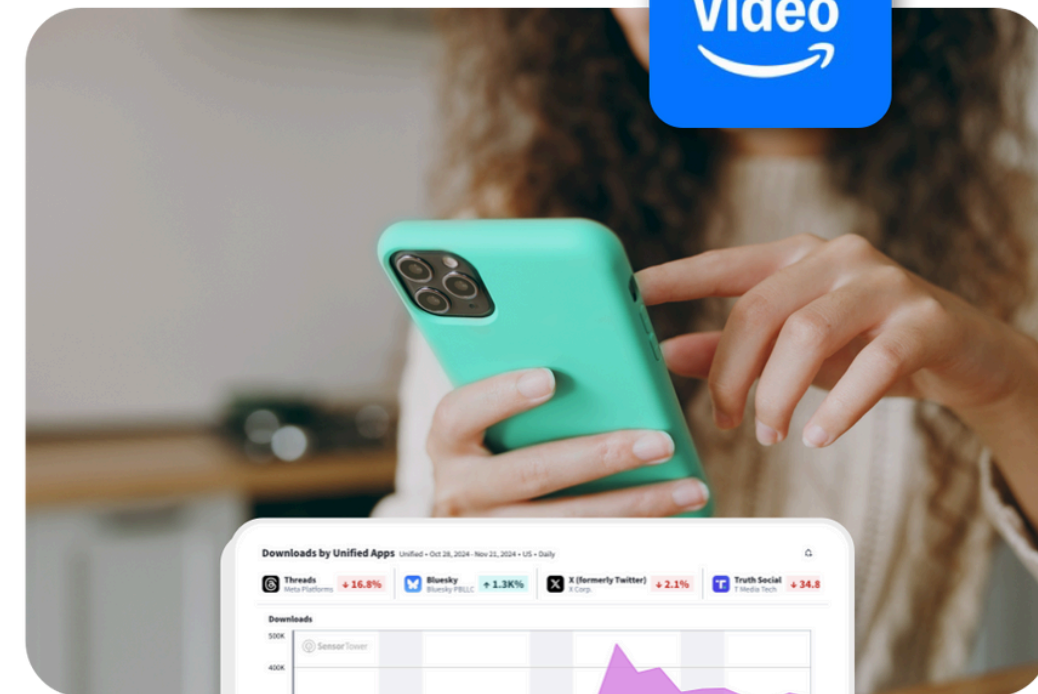
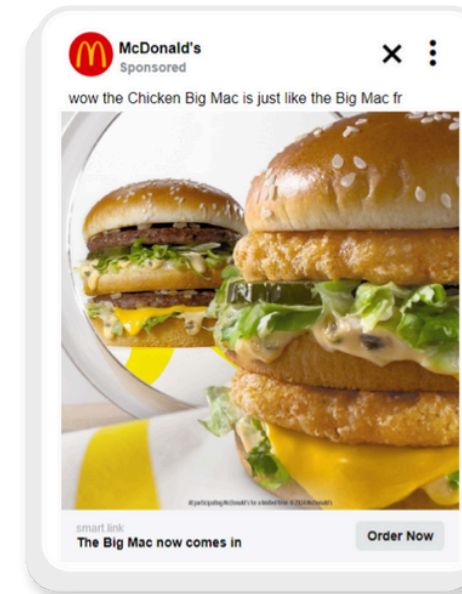
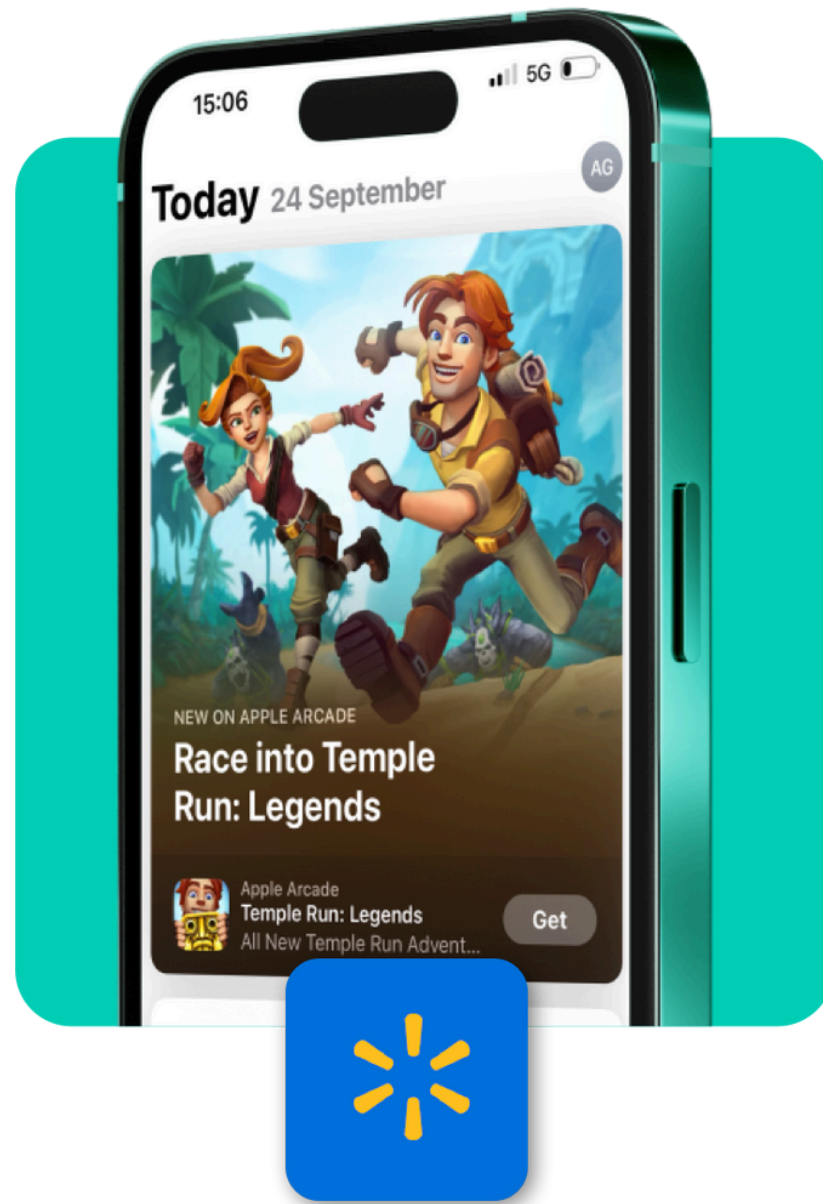
About Sensor Tower

Sensor Tower is the leading source of mobile app, digital advertising, retail media, and audience insights for the largest brands and app publishers across the globe.

With a mission to measure the world's digital economy, Sensor Tower's award-winning platform delivers unmatched visibility into the mobile app and digital ecosystem, empowering organizations to stay ahead of changing market dynamics and make informed, strategic decisions.

Founded in 2013, Sensor Tower's mobile app insights have helped marketers, app, and game developers demystify the mobile app landscape with visibility into usage, engagement, and paid acquisition strategies. Today, Sensor Tower's digital market insights platform has expanded to include Audience, Retail Media, and Pathmatics Digital Advertising Insights, helping brands and advertisers understand their competitor's advertising strategies and audiences across web, social, and mobile.

Press Inquiries: press@sensortower.com





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Request a free demo!



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