MID-YEAR EDITION · SPRING 2026

The 2026 Middle East App Growth Report

Seasonal Shifts and Growth Signals Defining MENA's App Economy

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Introduction

Ramadan 2026 has passed. The results are in. The seasonal spike was visible, but the signal was more nuanced than the spike. Installs arrived. Revenue followed. Engagement did not always keep pace. That gap is where the market is changing.

The mid-year edition of the 2026 Middle East App Growth Report examines how app growth is changing as the region matures. Combining **market intelligence from Sensor Tower** with survey insights from **400 regional app marketers** collected in **Q1 2026**, the report looks at **how seasonal demand is evolving across acquisition, engagement, and monetization**, and how **leading teams are adapting their acquisition, measurement, and creative strategies** around stronger growth signals.

Executive Summary

The GCC app market continues to outpace global growth benchmarks, but the strongest signal is no longer install volume alone. **Revenue is growing much faster than downloads**, pointing to a market that is becoming **more mature**, more competitive, and more focused on value after acquisition.

Seasonal windows still shape demand, but across categories, demand, engagement, and monetization are not always moving together. Marketers are responding by **investing more, diversifying channels, and measuring success by user quality, retention, and incremental value.**

Key Insights

What the Market Shows

GCC growth shifts toward monetization

Downloads grew 9% across the GCC from Q1 2024 to Q1 2026, while IAP revenue surged 41%, growing 4.5x faster than installs. Every GCC market outperformed the 21% global revenue growth benchmark, led by the UAE at +46% and KSA at +43%.

Seasonal exposure

Shopping and OTT carry the highest seasonal dependency. Shopping's two peak windows accounted for nearly one-fifth of annual downloads in 2025, while March alone accounted for 12% of annual OTT downloads.

Seasonality & cycles

OTT Ramadan downloads rose from +20% PoP in 2024 to +35% in 2025 and a record +48% in 2026. Food & Dining contracted during Ramadan before rebounding post-Ramadan around Eid, with downloads up +30% in 2024 and +45% in 2025.

Installs vs. engagement

OTT hit record Ramadan downloads in 2026 while total time spent dipped, showing that seasonal acquisition can rise without the same lift in usage. KSA Consumer Banking sessions exceeded 1.25B monthly throughout Q1 2026 despite declining downloads, pointing to more structural usage.

Key Insights

How Marketers Are Adapting

The calendar still anchors planning, but confidence is softer

86% of marketers still find Ramadan and Q4 reliable, but only 54% call them very reliable. Rising competition (48%) and shifting consumer behavior (44%) are making planning less predictable, even as 75% report improved performance and 91% maintained or gained share.

UA is being judged by stronger proof

Retention (32%), engagement (21%), and incrementality (15%) outrank CPA/CPI and ROAS as trusted metrics when conditions shift. 84% run incrementality testing at least occasionally, while top constraints remain creative production (28%), measurement (22%), and budget (22%).

Acquisition stays central, but volume is no longer enough

75% increase paid media budgets when usual market signals weaken, and 60% shift more budget toward acquisition when peaks weaken. At the same time, 37% prioritize engagement and retention, while 47% focus on protecting efficiency or scaling UA.

Fast creative, audience, and budget shifts win

76% respond to performance changes within 24 hours or a few days, and 77% refresh creatives weekly or more. When seasonal patterns shift, the most effective responses are creative testing (26%), audience strategy (23%), and budget shifting (22%).

Familiar channels anchor, but diversification is accelerating

Paid Social (49%) and App Store Advertising (43%) remain the most stable channels under uncertainty. But 70% test new channels more aggressively when signals weaken, while budget shifts toward brand campaigns (56%), retargeting (41%), and influencer partnerships (38%).

Methodology

This report combines **market intelligence from Sensor Tower** and **survey insights from Bidease** to provide a comprehensive view of how the market is changing and how teams are responding to those changes in the Middle East.

Bidease Survey Data

Conducted in April 2026 with 400 app marketers across:

- Saudi Arabia (100)
- UAE (100)
- Egypt (100)
- Qatar (100)

All respondents are directly involved in mobile growth, user acquisition, or marketing strategy. 80% identify as decision-makers and the remaining 20% as senior contributors. Roles span performance and UA marketing, growth marketing, CRM and retention, marketing leadership, and agency or consulting practitioners working with mobile apps.

Sensor Tower Methodology

Data in this report was sourced from Sensor Tower's Mobile App Insights platform, covering iOS App Store and Google Play downloads and in-app purchase (IAP) revenue from Q1 2024 to Q1 2026.

All figures represent unique installs per user account and gross IAP revenue (inclusive of app store fees). Android data reflects Google Play Store only. The GCC region includes Saudi Arabia, the United Arab Emirates, Kuwait, Qatar, Bahrain, and Oman

WHAT THE MARKET SHOWS

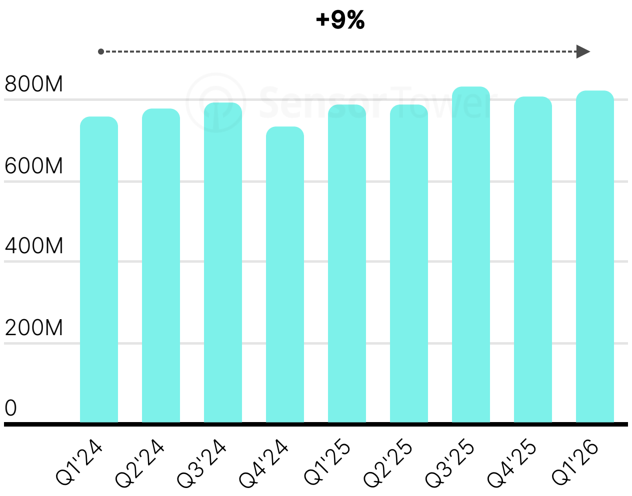
GCC Market Overview

The GCC app market continues to grow ahead of global benchmarks, but the strongest signal is monetization. Downloads are still rising, yet IAP revenue is growing much faster across every GCC market. The next question is where demand turns into revenue, engagement, and durable usage.

GCC Overview

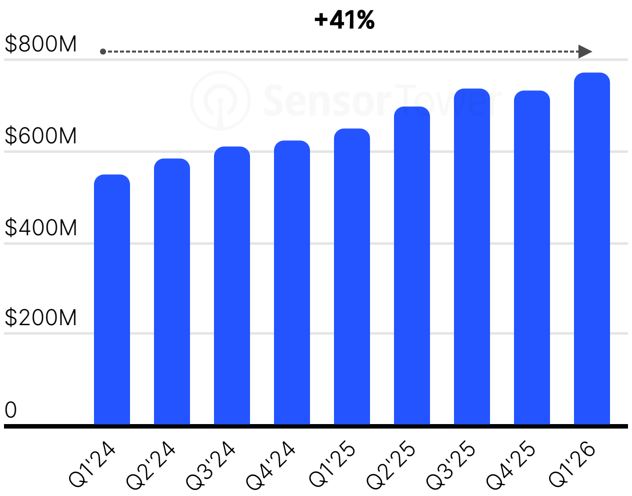
Quarterly Downloads

GCC Overview



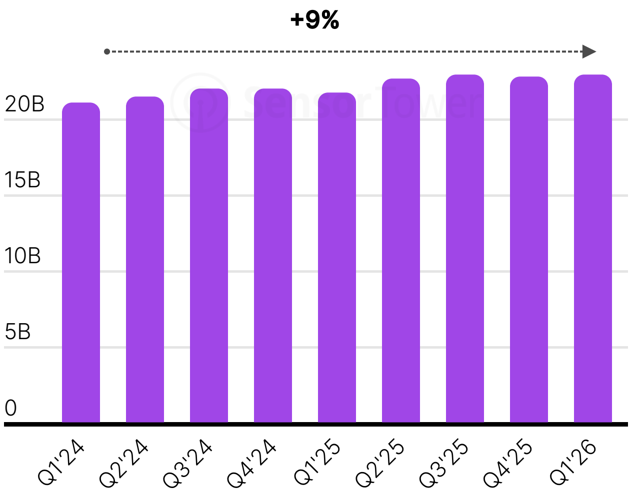
Quarterly IAP Revenue

GCC Overview



Quarterly Time Spent (Hours)

GCC Overview



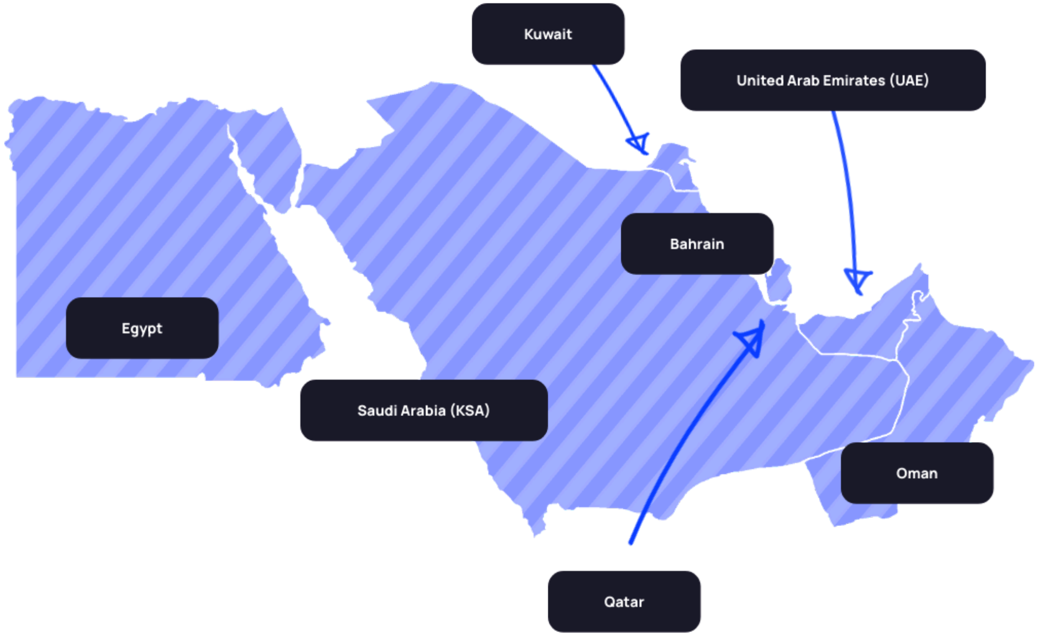
- The GCC app market is showing a clear shift from install-led growth toward stronger monetization. While app downloads maintained a steady upward trajectory, increasing by 9% between Q1 2024 and Q1 2026, IAP revenue surged by 41% during the same period.
- This trend is consistent across the region, with every GCC market achieving at least **25% revenue growth**, significantly outperforming the 21% global average.

Market Maturity Looks Different Across the GCC

- **UAE leads monetization growth**
  IAP revenue grew 46%, the highest among GCC markets, alongside growth in downloads and time spent.

- **KSA remains the scale market**
  Revenue grew 43%, while downloads and time spent rose more moderately, pointing to a market where monetization is outpacing volume.

- **Other GCC markets show different signals**
  Kuwait posted the fastest download growth, while Qatar led growth in time spent.



WHAT THE MARKET SHOWS

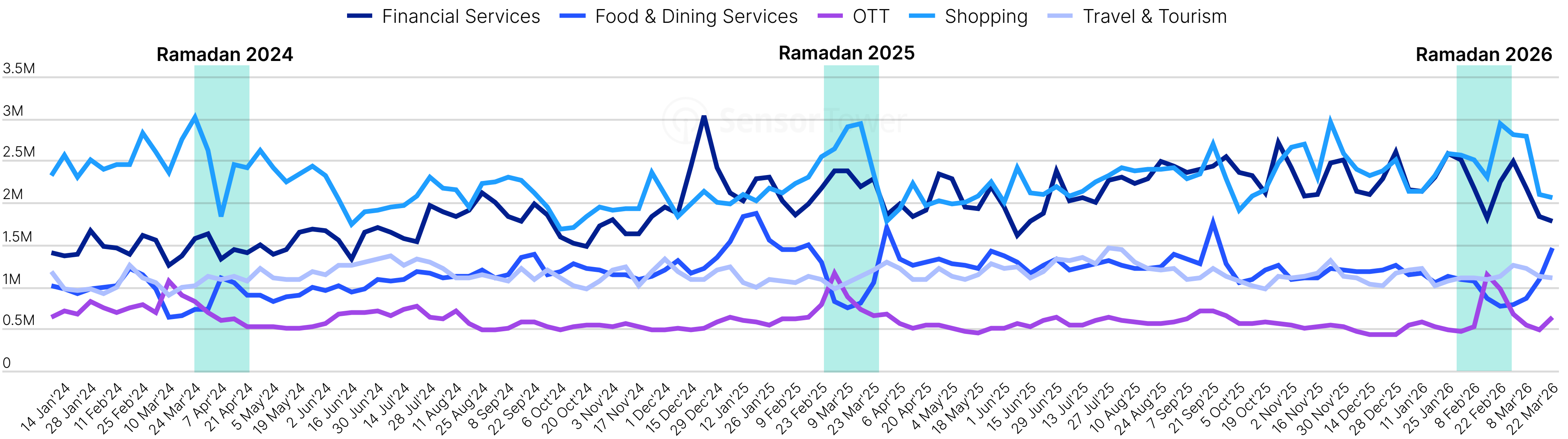
Seasonality & Cycles

Seasonal peaks still shape consumer behavior across the GCC app economy. Ramadan, Eid, summer, and Q4 sales periods continue to create visible shifts in app demand, but each window affects categories differently. Ramadan 2026 was no exception, with performance varying across categories and markets. Peak moments still create demand, but marketers need to understand what kind of growth each window is producing.

Seasonal Windows Still Shape Download Demand

Weekly Download Trend

Saudi Arabia | United Arab Emirates | Rest of GCC

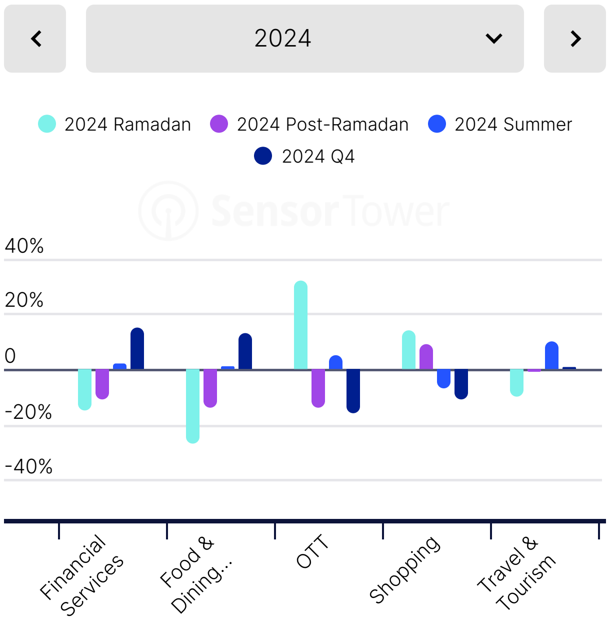


OTT shows the clearest Ramadan download spike, while Food & Dining contracts during Ramadan before rebounding around Eid. Shopping also builds around November sales, reinforcing that peak windows remain visible in the data.

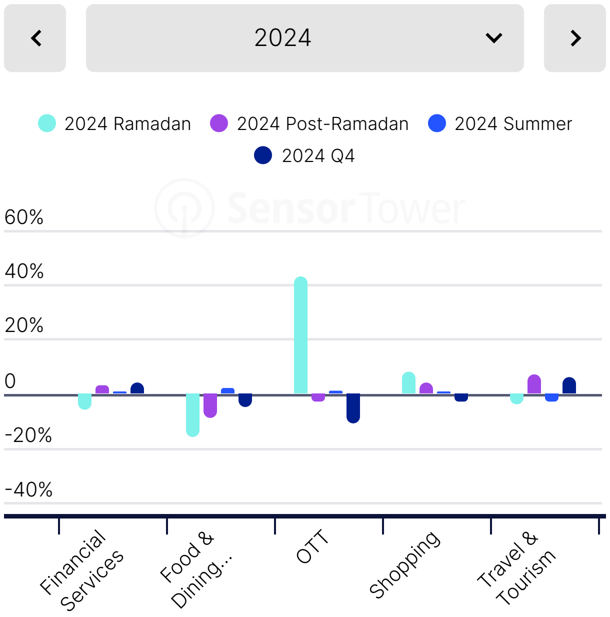
OTT Leads Ramadan Acquisition, While Food & Dining Rebounds Around Eid

Indexed Downloads During Seasonal Windows

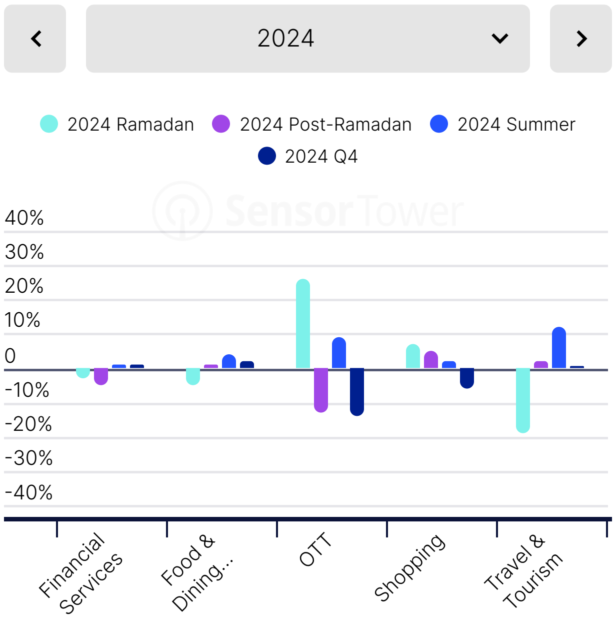
Saudi Arabia



United Arab Emirates



Rest of GCC

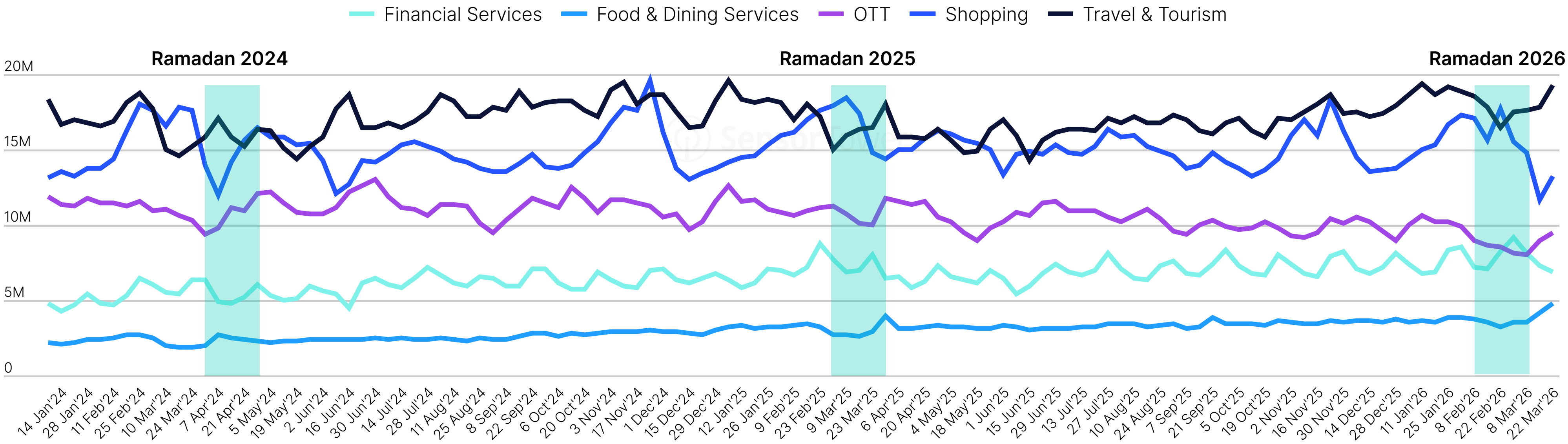


At the **GCC** aggregate level, OTT shows the strongest Ramadan acquisition pattern with downloads rising from +20% in 2024 to +35% in 2025 and +48% in 2026. Food & Dining ran the opposite cycle, contracting during Ramadan before rebounding around Eid, with post-Ramadan downloads up +30% in 2024 and +45% in 2025. **The market-level views show where 2026 diverged**: Shopping growth was more measured in the UAE than prior peaks, while Travel turned positive.

Install Spikes Do Not Always Translate Into Engagement

Weekly Time Spent (Hours)

Saudi Arabia	United Arab Emirates	Rest of GCC



OTT downloads reached **their strongest Ramadan lift** in 2026, but **total time spent declined by 12% during the same window.** Shopping engagement also built around the November sales period and peaked in the final full week of November in both 2024 and 2025.

WHAT THE MARKET SHOWS

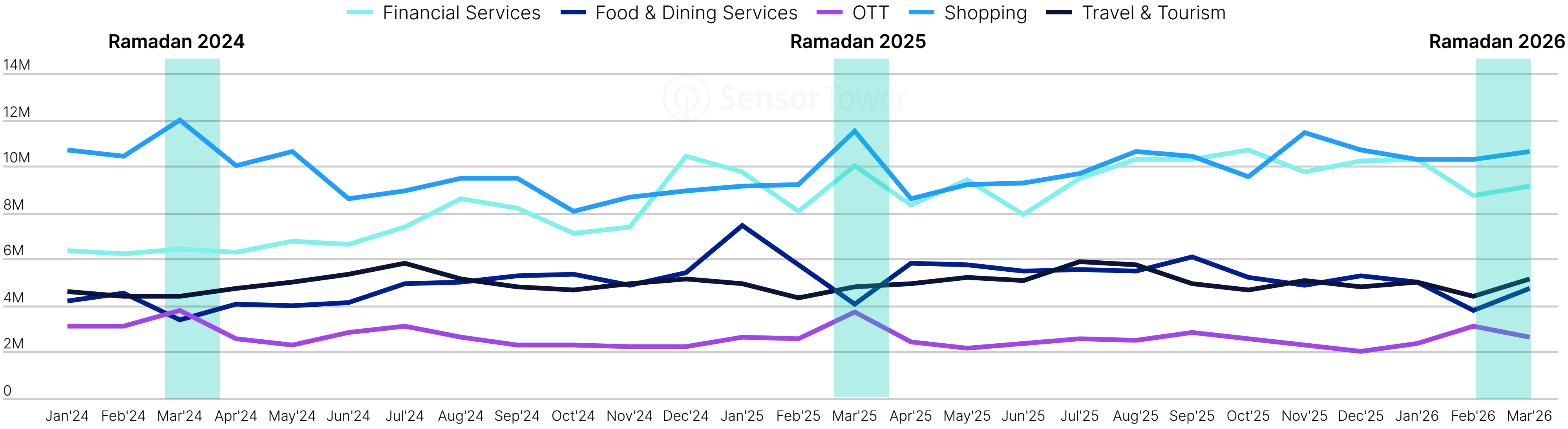
Seasonal Exposure

Some categories depend more heavily on peak windows than others. Shopping and OTT show the highest seasonal dependency, with a meaningful share of annual downloads concentrated around Ramadan, Eid, and November sales. That concentration creates upside when peaks perform, but also exposes categories to greater volatility when demand patterns shift.

Shopping and OTT Depend Most on Peak Windows

Monthly Download Trend

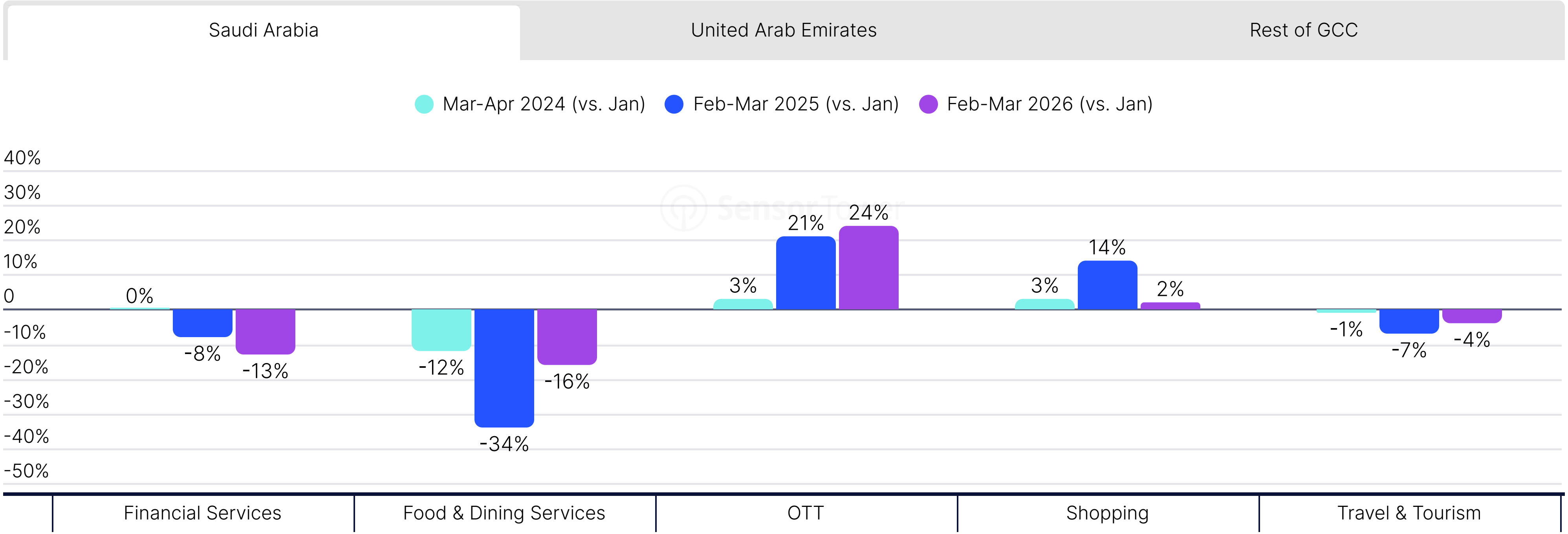
Saudi Arabia	United Arab Emirates	Rest of GCC



Shopping and OTT are the two categories most exposed to seasonal volatility across the GCC. Shopping relies heavily on Ramadan/Eid and Yellow/White Friday, with these two peak months accounting for nearly one-fifth of annual downloads in 2025. OTT is similarly concentrated around Ramadan, with March 2025 accounting for 12% of annual downloads.

Ramadan Splits Category Performance

Download Growth During Ramadan by Genre

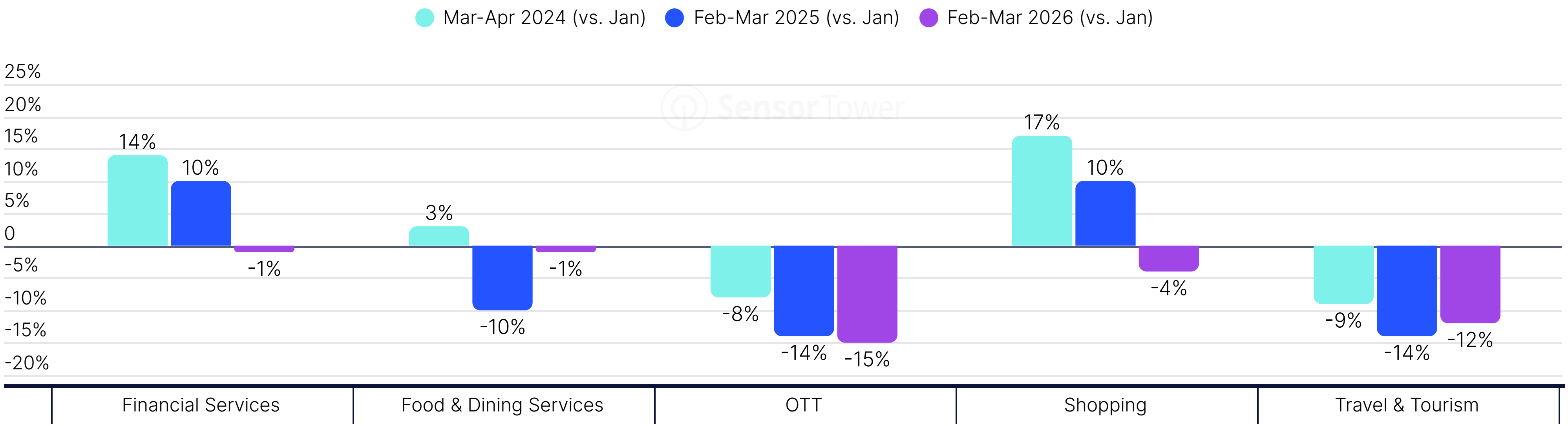


OTT remained the strongest Ramadan winner, with 2026 downloads up +59% in the Rest of GCC, +54% in the UAE, and +24% in KSA. Food & Dining moved in the opposite direction, declining across all three market views in both 2025 and 2026. Financial Services showed smaller seasonal movements in KSA and the UAE, consistent with a category anchored in recurring utility rather than peak acquisition.

Ramadan Download Lift Does Not Always Translate Into Usage

Time Spent Growth During Ramadan by Genre

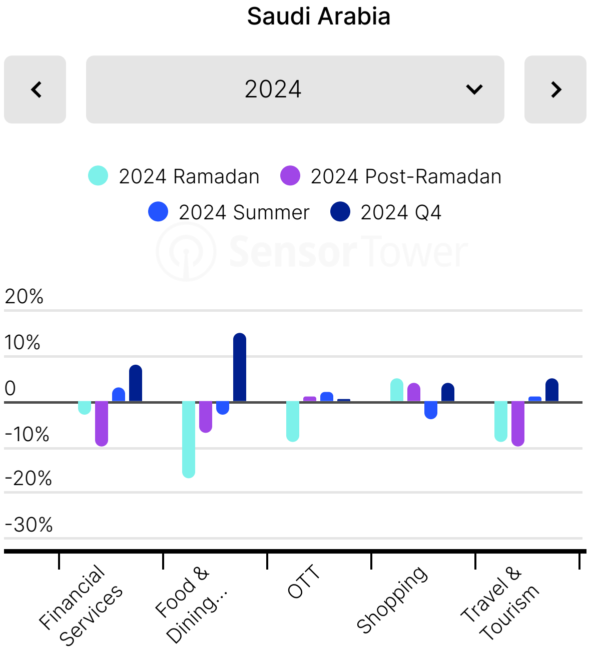
Saudi Arabia | United Arab Emirates | Rest of GCC

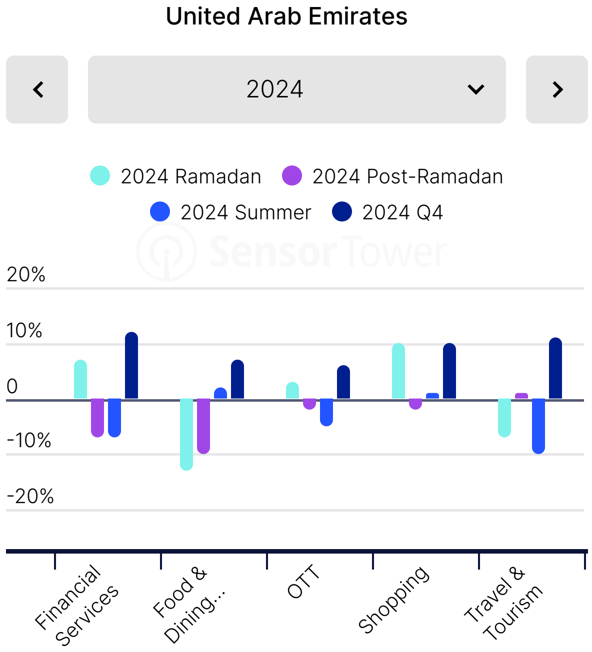


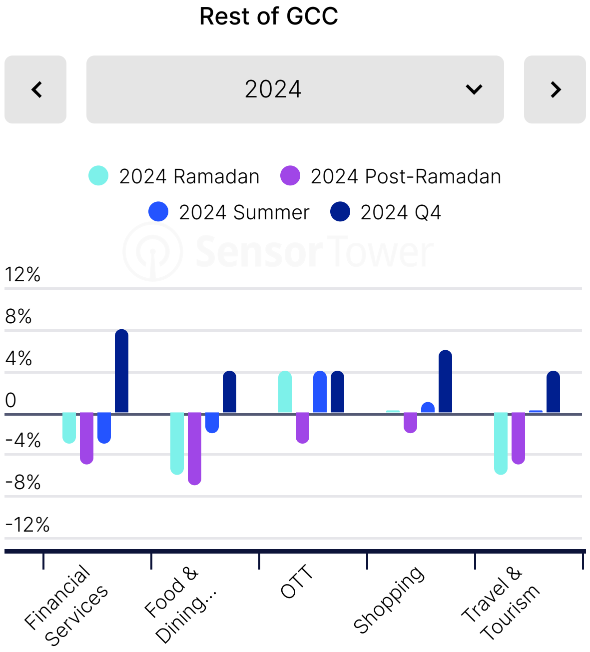
In 2026, OTT time spent fell across KSA (-15%), UAE (-12%), and the Rest of GCC (-4%). **Shopping also shifted from positive Ramadan time-spent growth in 2024 and 2025 to declines across all three market views in 2026**. Finance was more stable, with smaller movements than the more seasonal categories.

Engagement Peaks Shift Beyond Ramadan

Indexed Time Spent During Seasonal Windows



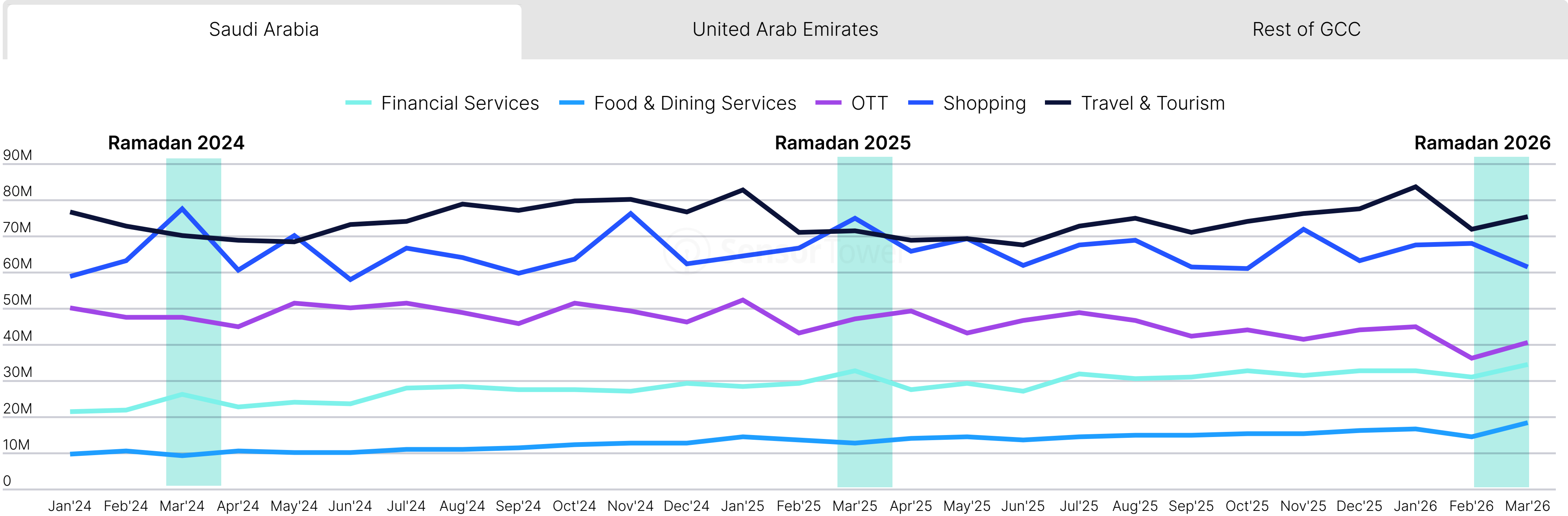




The stronger usage moments appeared outside Ramadan. In 2025, Summer lifted OTT (+16%) and Shopping (+11%) in the Rest of GCC, while Q4 drove Shopping (+13%) and Travel (+12%) in the UAE. Food & Dining also strengthened in Q4 across KSA and the Rest of GCC. **This suggests Ramadan is a powerful acquisition window, but not always the strongest engagement window.**

Usage Is Less Concentrated Than Downloads

Monthly Time Spent (Hours) Trend



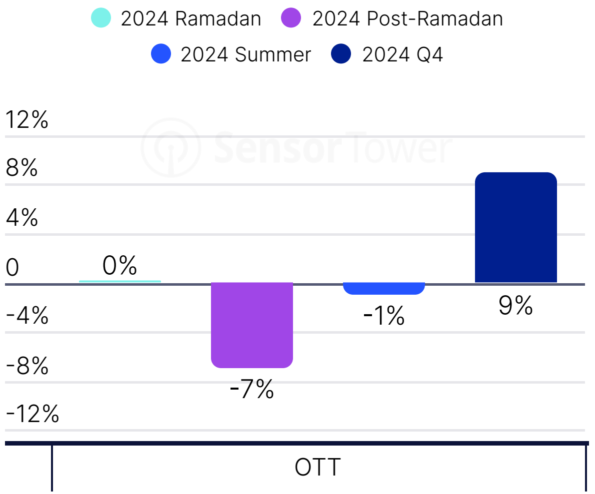
Monthly time spent shows a broader usage base than the download charts. **Travel & Tourism** and **Shopping** account for the largest absolute time spent across the period, while Finance shows steadier usage than the more seasonal categories. This suggests that seasonal download exposure does not always reflect where consumers spend the most time throughout the year.

OTT Monetization Is Becoming More Ramadan-Led

Indexed IAP Revenue During Seasonal Windows

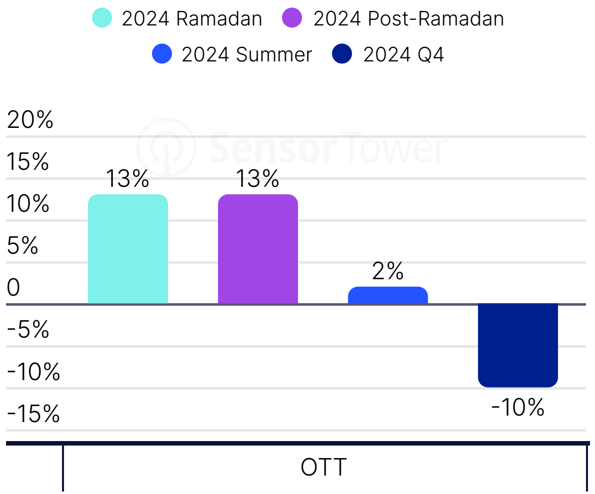
Saudi Arabia

2024



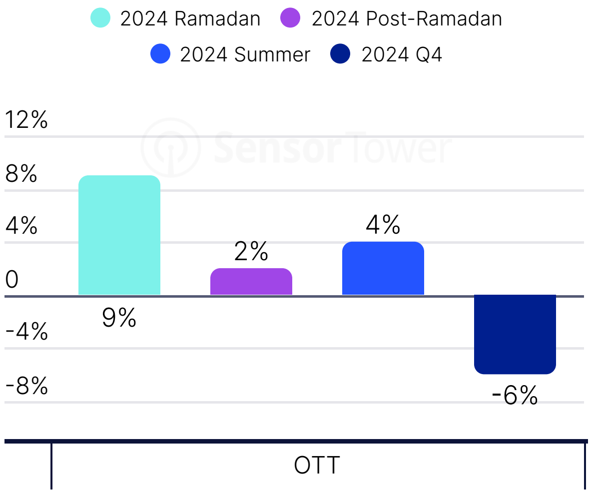
United Arab Emirates

2024



Rest of GCC

2024



OTT IAP growth accelerated sharply during Ramadan 2026, rising +38% in KSA and +47% in Rest of GCC, while the UAE remained consistently strong after two already-high Ramadan periods. Later seasonal windows showed weaker or less consistent lifts, reinforcing Ramadan as the category's clearest monetization window.

WHAT THE MARKET SHOWS

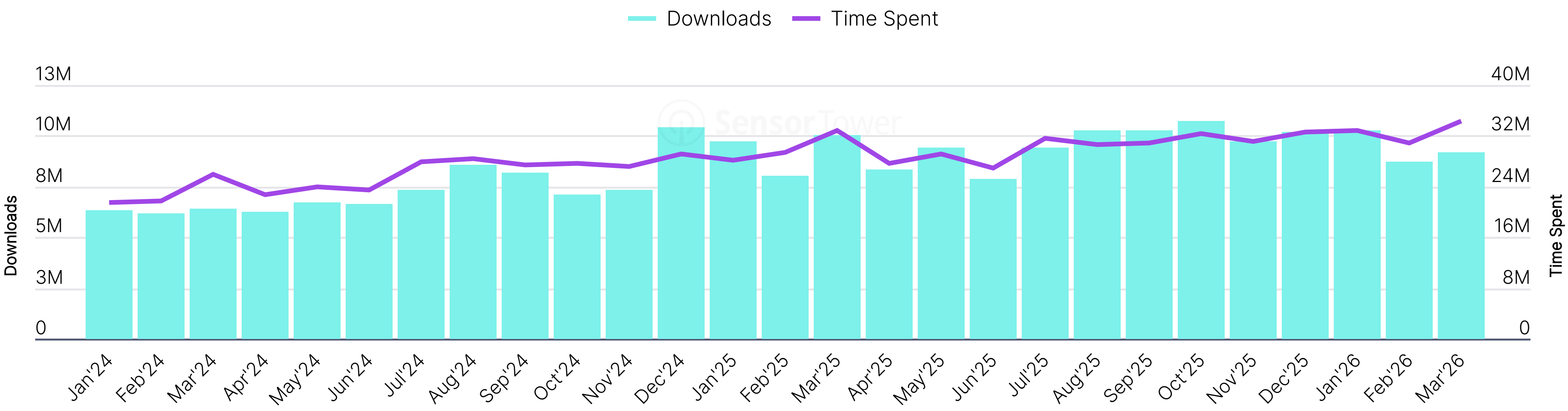
Acquisition vs. Engagement

OTT reached record Ramadan downloads while time spent dipped, and Shopping engagement cooled after promotional peaks. Finance shows the other side: steadier usage even when downloads soften. The bigger question is whether customers keep engaging after they arrive.

UAE Shopping Engagement Tracks Promotional Peaks

Monthly Downloads vs. Time Spent in UAE

Financial Services | Shopping | Travel & Tourism

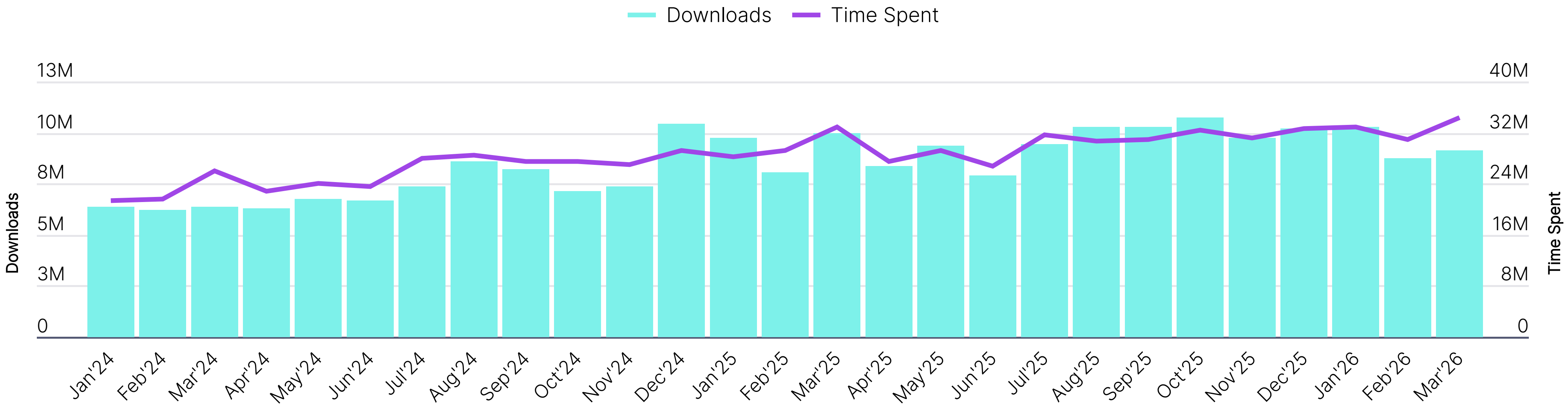


In the UAE, the November 2025 Shopping download peak directly fueled the year's highest engagement. As downloads normalized in early 2026, time spent also cooled, showing how closely engagement tracks promotional windows.

Finance and Travel Show More Durable Usage in KSA

Monthly Downloads vs. Time Spent in Saudi Arabia

Financial Services | Shopping | Travel & Tourism

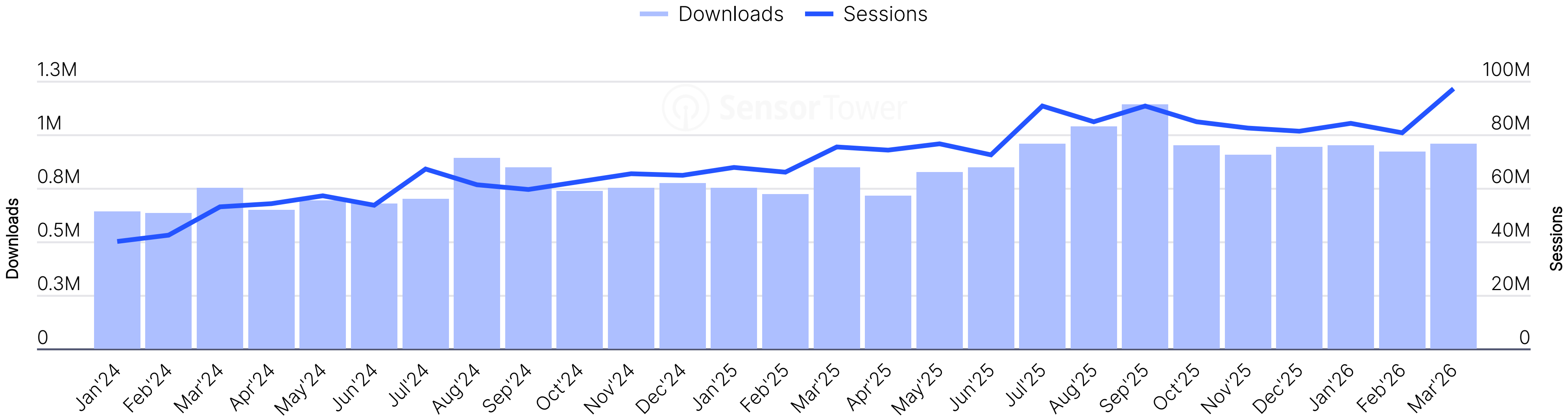


- **Financial apps show the strongest structural stability in KSA.** Even during months when downloads dipped in early 2026, total time spent remained consistently above 30M in the first three months of 2026.
- **Travel also shows signs of more planned, recurring usage in KSA**. In March 2026, despite a moderate acquisition pace, total time spent remained high, suggesting that usage is less dependent on short-term install spikes.

Consumer Banking Holds Sessions Despite Lower Acquisition

Monthly Downloads vs. Sessions by Finance Subgenre in Saudi Arabia

Buy Now, Pay Later

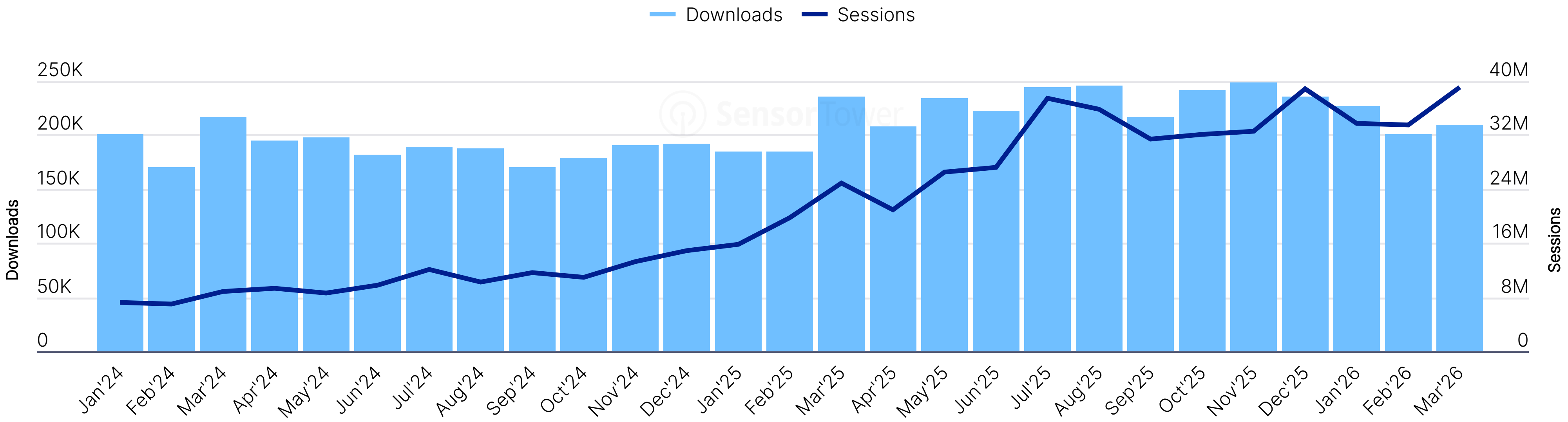


Consumer Banking demonstrates the most consistent session volume in KSA, maintaining a high degree of stability regardless of download fluctuations. Despite a downward trend in new-user acquisition throughout Q1 2026, total sessions remained resilient, consistently exceeding 1.25B monthly. **By contrast, Cryptocurrency downloads** increased 22% month-over-month in March 2026, but total sessions increased only 2%.

Crypto Does Not Show the Same Recurring Usage

Monthly Downloads vs. Sessions by Finance Subgenre in UAE

Buy Now, Pay Later



Cryptocurrency shows a different pattern from Consumer Banking. In early 2026, Crypto sessions remained more sensitive to short-term acquisition cycles, while Consumer Banking showed more recurring utility. This reinforces that Finance should not be treated as one uniform category: some subgenres are event-driven, while others are built around recurring usage.

HOW MARKETERS ARE ADAPTING

Market Signals

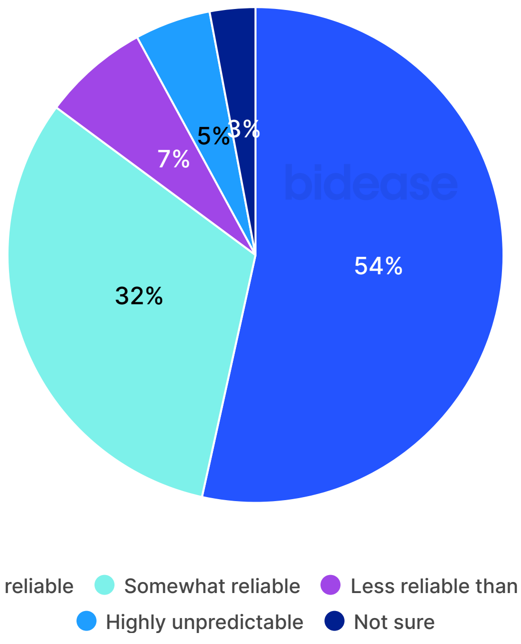
Ramadan and Q4 remain planning anchors, but marketers are treating them with more nuance. Rising competition and shifting consumer behavior are reshaping how teams plan and execute growth in the region. Confidence in the market is intact. Confidence in the old assumptions is not.

The Calendar Still Matters, But Planning Is Less Certain

- **Ramadan and Q4 remain planning anchors**
  86% say traditional peak periods are reliable for growth planning, confirming that marketers are not abandoning the seasonal calendar.

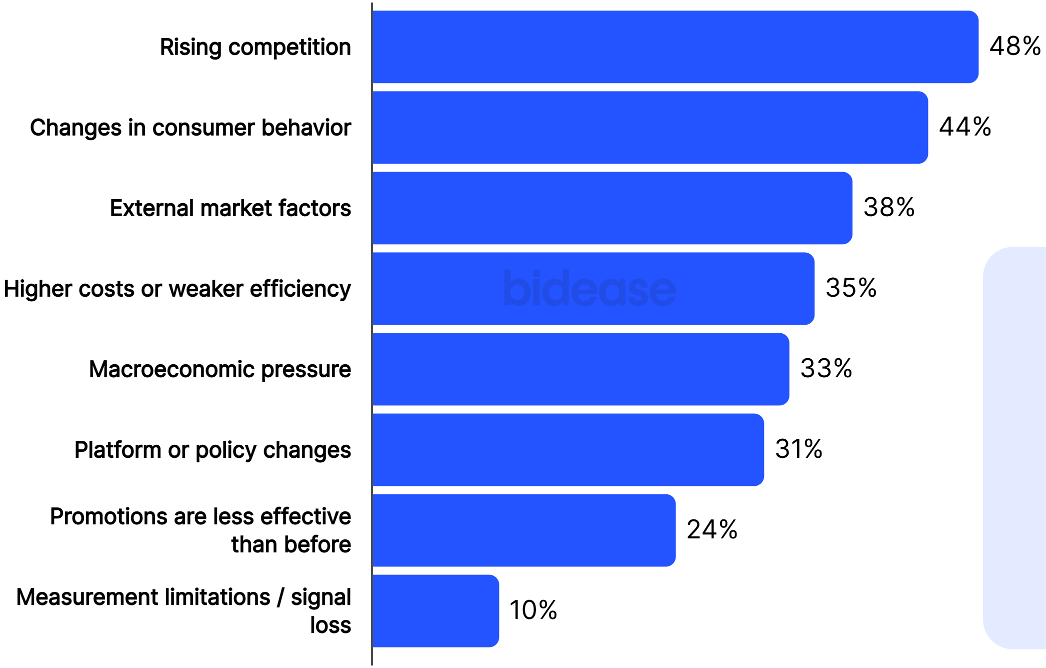
- **Reliability is broad, but not equal**
  54% call these periods very reliable. Marketers still plan around peak windows, but they are no longer treating them as guaranteed performance drivers.

How reliable are traditional peak periods like Ramadan and Q4 for planning your growth strategy today?



Competition Is Reshaping How Teams Plan

What has made seasonal planning less predictable for your team over the past year?

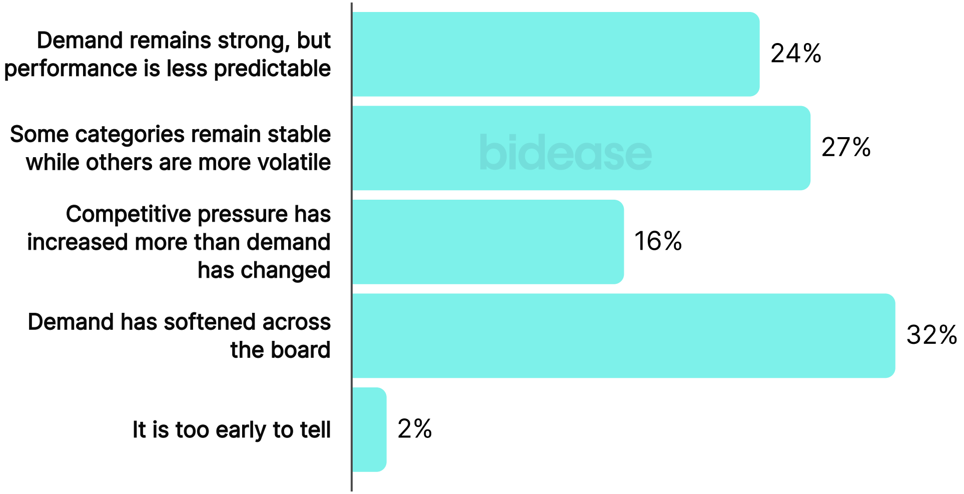


- **Competition is the main disruptor**
  48% cite rising competition as a reason seasonal planning has become harder to rely on, followed by shifting consumer behavior at 44%. The challenge is not the absence of demand, but the difficulty of capturing it consistently.

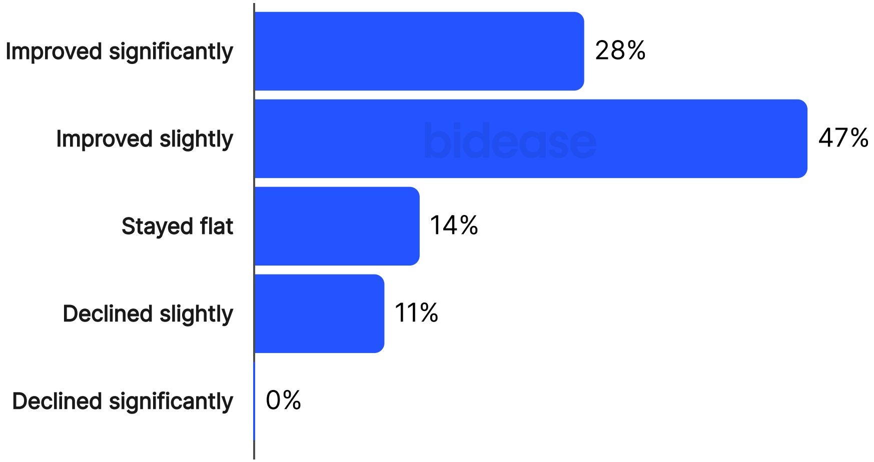
> "The UAE is leading the GCC in app revenue growth, and that points to where the market is heading. Peak windows remain powerful, but the next stage of growth belongs to teams who know which customers stay, spend, and come back, and how to reach more of them."
>
> Shy Rahimi. Managing Director of MENA, Bidease

The Market Is More Uneven, Not Weaker

Which statement best reflects your view of the current market?



When market conditions have been less predictable, how has your performance actually changed?



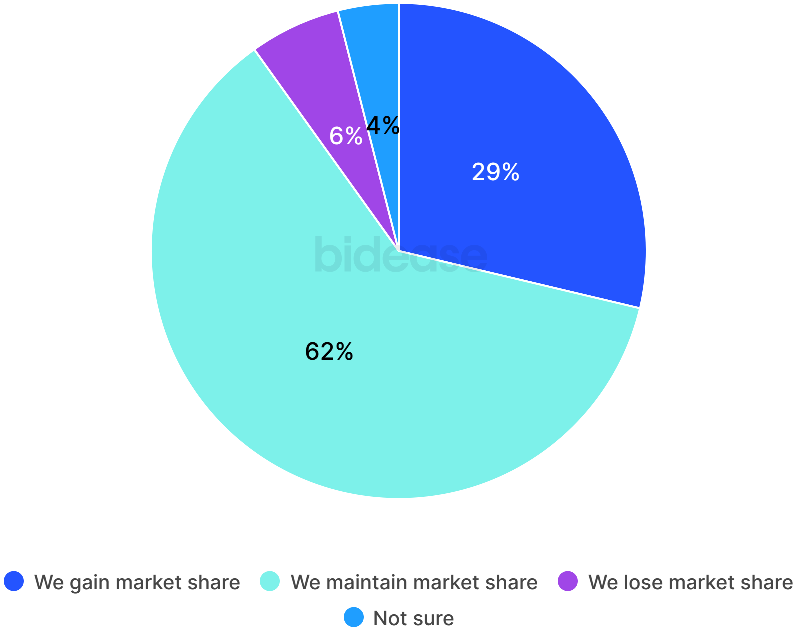
- **Marketers are reading a fragmented market**
  32% say demand has softened across the board, while 27% say some categories remain stable and others are more volatile. The market does not have one simple direction.

- **Performance is still improving**
  75% say performance has improved even when market conditions have become less predictable.

Volatility Is Creating Openings for Faster Teams

- **Most teams are holding their ground**
  91% say they maintained or gained share when market conditions became less predictable, showing that volatility has not stopped growth.
- **Some teams are pulling ahead**
  29% say they gained share against competitors. Less predictable conditions can create openings for teams that move faster and execute better.
- **Execution becomes the advantage**
  When market signals are harder to read, teams that adjust budgets, channels, audiences, and creative faster are better positioned to capture demand.

Compared to competitors, how does your team perform when market conditions are less predictable?



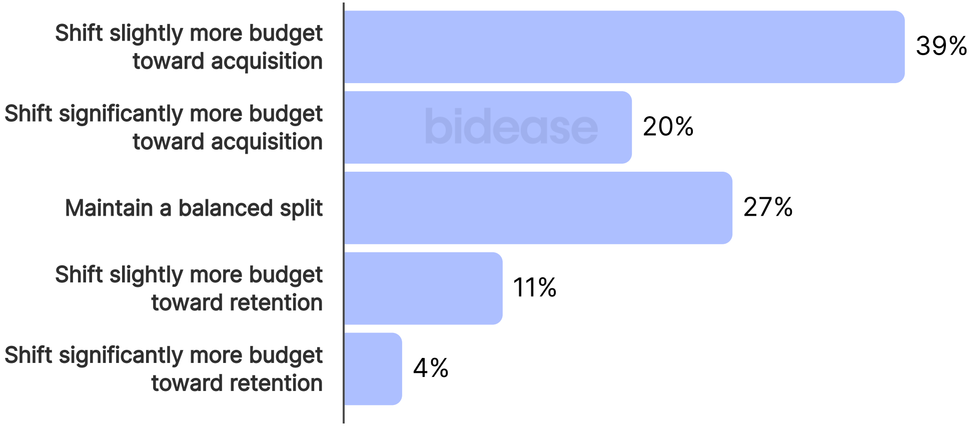
HOW MARKETERS ARE ADAPTING

Budget & Acquisition

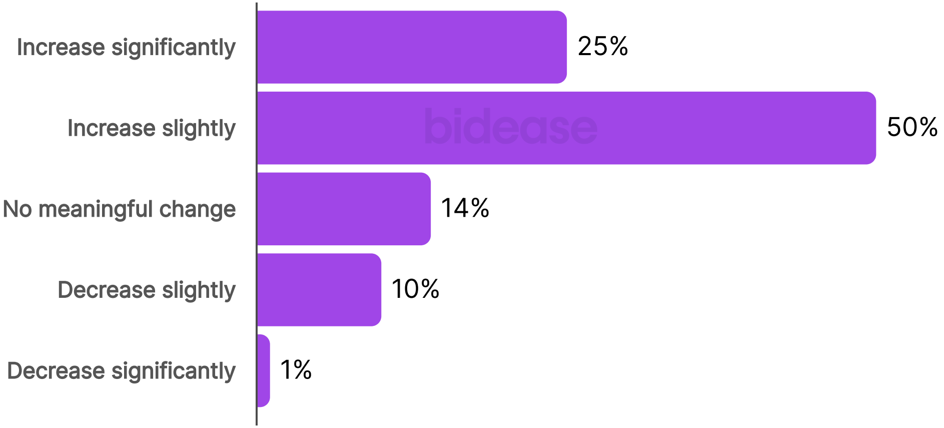
Budgets are still moving toward growth. When familiar signals weaken, marketers are increasing spend and leaning further into acquisition, not pulling back. UA remains central, but the standard is rising. Growth teams are putting more pressure on acquisition to deliver customers who engage, retain, and create measurable value beyond the first download.

Budgets Rise When Signals Weaken

When expected peak demand weakens, how does your budget allocation shift between acquisition and retention?



When market conditions become less predictable, how does your total paid media budget typically change?



- **Acquisition remains the default response**
  Nearly 60% shift more budget toward acquisition when expected peak demand weakens, compared with only 15% who shift more toward retention.

- **Marketers are still increasing spend**
  75% increase paid media budgets when growth signals become harder to read. Uncertainty is not causing teams to pull back from growth.

Acquisition Is Still Central, But the Bar Is Rising

- **Engagement and retention lead the priority list**
  37% say engagement and retention become their primary objective when seasonal demand is less reliable.

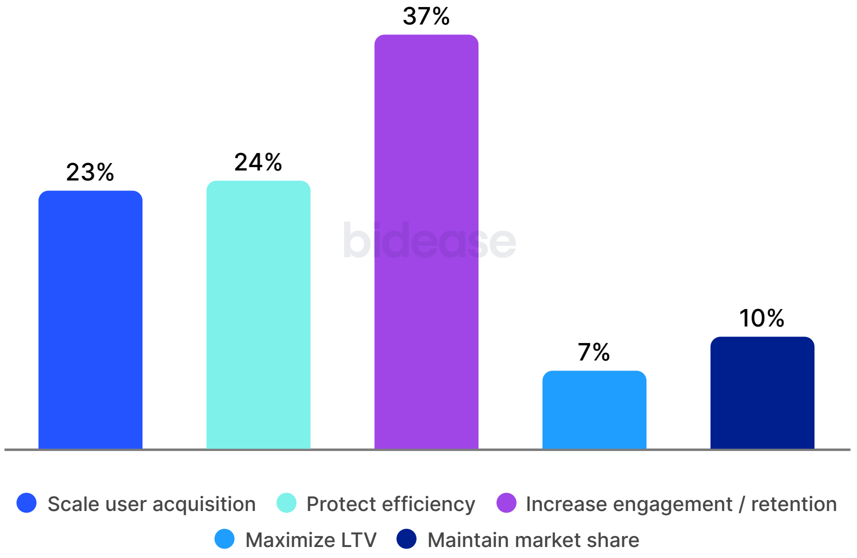
- **Efficiency remains a major concern**
  24% prioritize protecting efficiency, while 23% focus on scaling acquisition. Together, nearly half are still focused on efficient growth and UA scale.

- **The definition of good UA is changing**
  Marketers are not moving away from acquisition. They are redefining it around user quality, efficiency, and post-install value.

"The market is moving past volume as the primary measure of success. Efficient growth now depends on knowing which users are worth acquiring, which channels create incremental lift, and where spend can scale without diluting quality."

Dennis Mink, CMO, Bidease

When expected seasonal demand becomes less reliable, what is your primary objective?



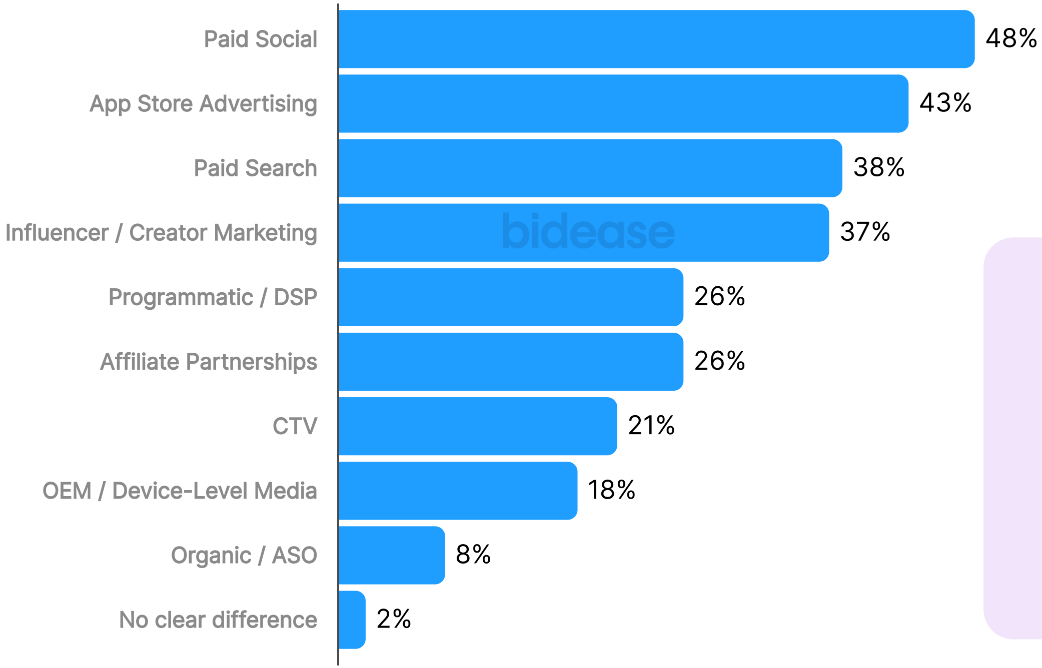
HOW MARKETERS ARE ADAPTING

Channel Mix

Core channels still anchor the plan, but marketers are expanding the mix. Paid social, app store ads, and search remain stable, while teams test new channels more aggressively and reallocate spend across brand, retargeting, influencer, ASO, and performance UA. Keep what works, but diversify to find new pockets of demand outside the obvious channels.

Core Channels Still Anchor the Mix

Which channels have been most stable and predictable when performance signals are less reliable?



- **Paid social and app store advertising remain stable**
  48% cite Paid Social, and 43% cite App Store Advertising as the most stable channels when performance signals become less reliable.

"Most brands are still over-weighted toward the same few environments, even though consumers spend time across a much broader app ecosystem. The opportunity is not to abandon core channels, but to add high-quality supply that helps marketers find incremental users outside the most crowded places."

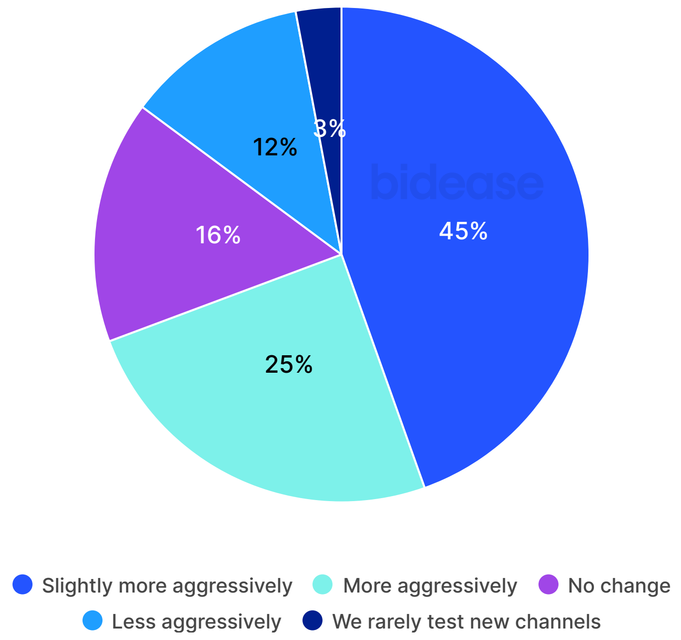
Ross Barasch, VP, Partnerships and Innovation, Bidease

Testing Beyond Core Channels Is Accelerating

- **Testing is becoming more aggressive**
  70% test new channels more aggressively when signals weaken, showing that marketers are looking beyond the usual mix for new growth opportunities.

- **Stability and diversification now work together**
  Marketers are not replacing core channels. They are using them as the foundation while testing new routes to reach customers more efficiently.

When performance signals are less reliable, how aggressively do you test new channels?



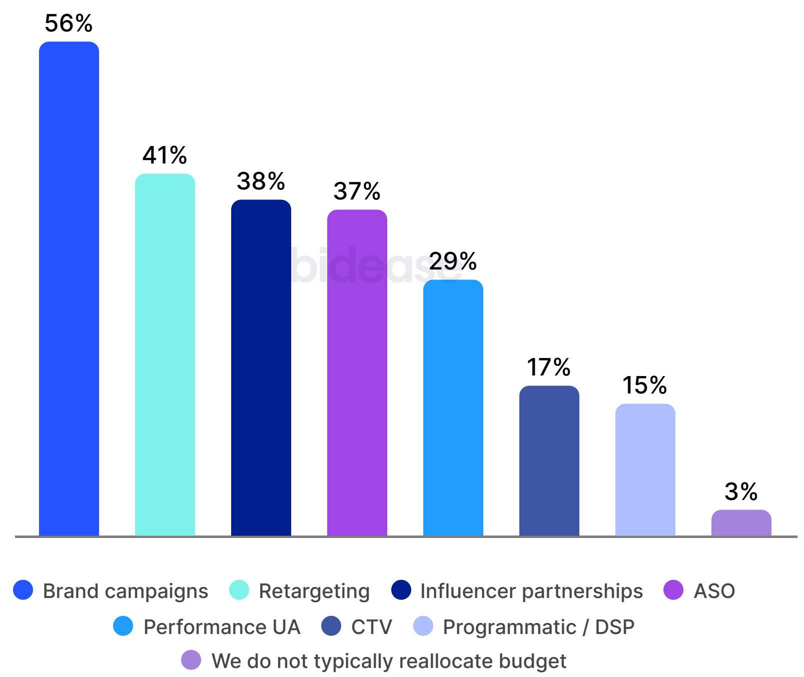
Budgets Are Moving Across a Broader Growth Mix

- **Programmatic DSPs remain underused**
  Only 15% shift budget toward programmatic DSPs, far behind brand (56%), retargeting (41%), and influencer (38%). For teams willing to move early, DSP offers a less crowded path to incremental demand.

- **Retargeting and influencer gain weight**
  41% reallocate toward retargeting and 38% toward influencer partnerships, pointing to a broader mix of demand capture, re-engagement, and trusted discovery.

- **Diversification is becoming practical, not optional**
  As core channels become more competitive, marketers are spreading spend across more levers to find new pockets of demand and reduce dependence on a single growth engine.

When market conditions become less predictable, where do you typically reallocate budget?



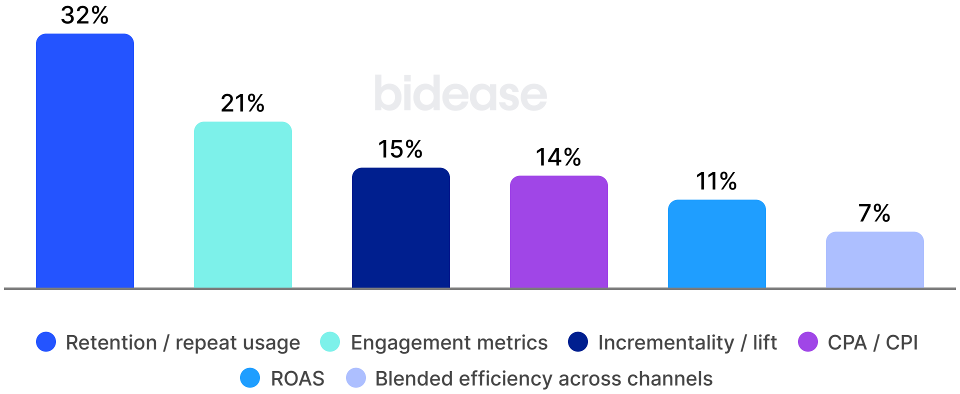
HOW MARKETERS ARE ADAPTING

Measurement & Incrementality

Marketers still track CPA, CPI, and ROAS, but when conditions become less predictable, they put more weight on the metrics that prove whether growth is real: retention, engagement, and incrementality. The goal is not just to acquire users cheaply, but to prove that those users stay active and create measurable value.

Quality Metrics Now Outrank Cost Metrics

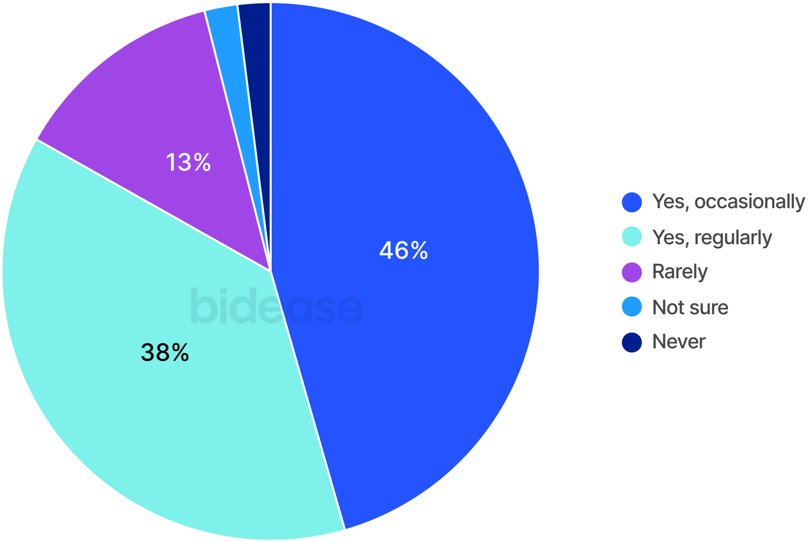
When market conditions shift, which metric do you trust most to guide decisions?



- **Retention becomes the strongest signal**
  32% trust retention and repeat usage most when market conditions shift, ahead of CPA, CPI, and ROAS.

- **Engagement matters more when signals weaken**
  21% prioritize engagement metrics, showing that marketers want to know whether acquired users are actually active after the install.

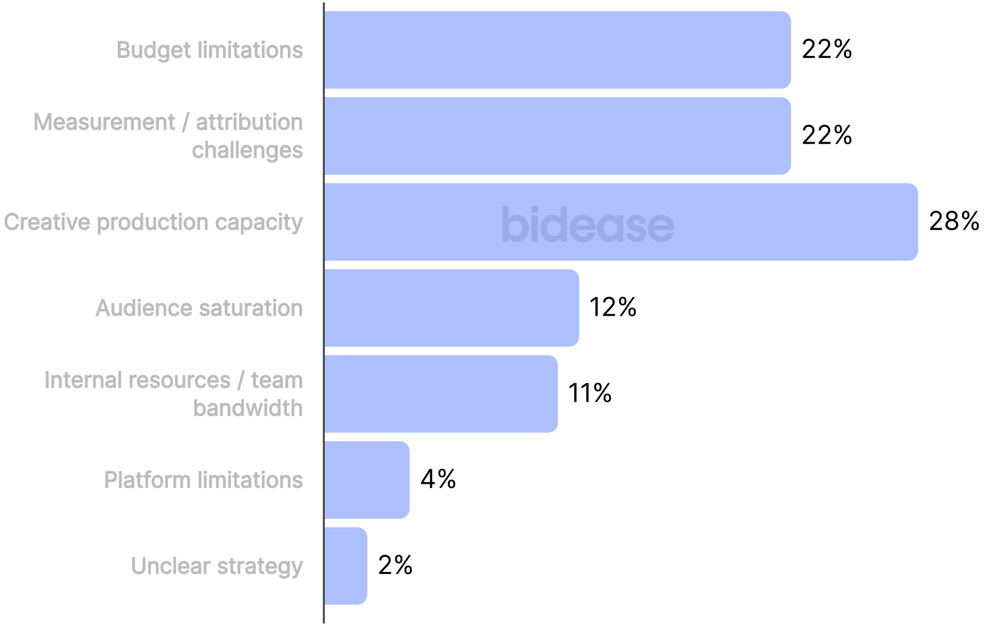
Do you run incrementality or lift testing when performance becomes less predictable?



- **Incrementality is becoming standard practice**
  84% run incrementality or lift testing at least occasionally, with 38% doing it regularly.

Execution Gaps Are Limiting Stronger Proof

What is the biggest constraint limiting your performance when market conditions are unpredictable?



- **Creative capacity is the top constraint**
  28% cite creative production capacity as the biggest limit when performance patterns shift.

- **Measurement still creates friction**
  22% cite measurement and attribution challenges, while another 22% cite budget limitations.

"The best conversations with clients are no longer only about CPI or CPA. They are about whether a campaign is bringing in customers who stay, engage, and move the business forward. Measurement has to help marketers see quality, not just cost."

Sima Vance, Head of CSM and Product Ops, Bidease

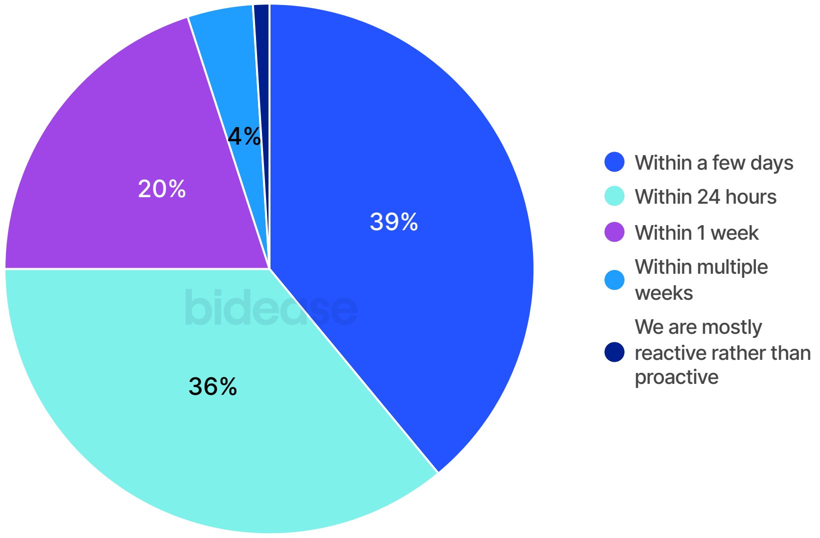
HOW MARKETERS ARE ADAPTING

Creative & Execution Speed

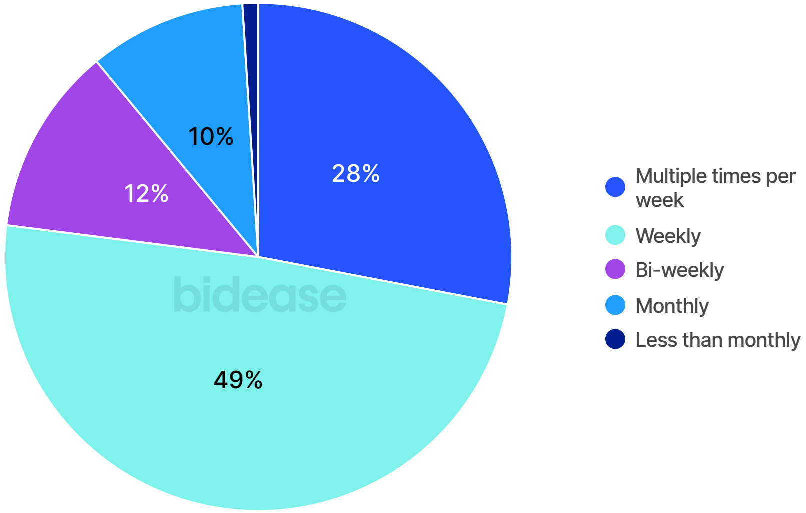
Speed is becoming an advantage. When seasonal patterns shift, marketers are responding faster, refreshing creatives more often, and adjusting audience and budget strategy before performance drops too far. The goal is not just to move quickly, but to create a tighter loop between what the market shows, what campaigns learn, and where spend goes next.

Adaptation Cycles Are Getting Shorter

How quickly does your team typically respond to changes in performance or market conditions?



How frequently do you refresh creatives when market conditions become less predictable?

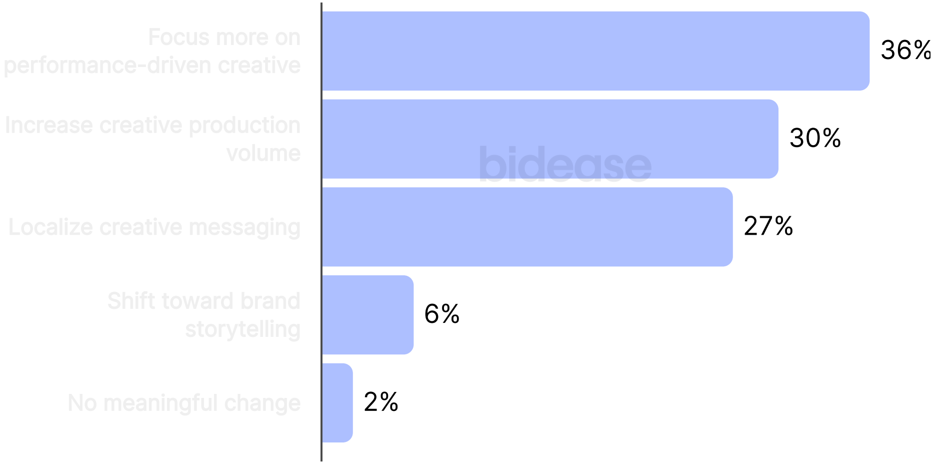


- **Most teams react within days**
  75% respond to market or performance changes within 24 hours or a few days, showing that slow monthly planning cycles are no longer enough.

- **Creative cycles are also speeding up**
  77% refresh creatives weekly or more, including 28% who refresh multiple times per week.

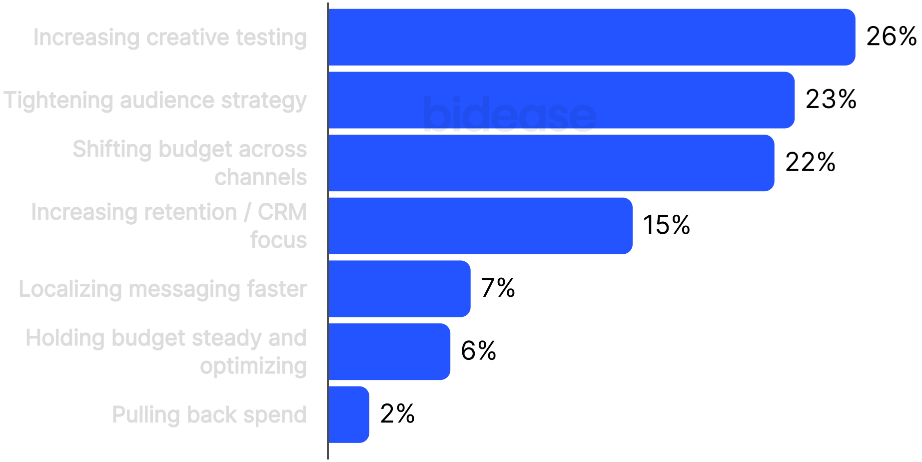
Creative Testing Leads the Optimization Mix

How does your creative strategy change when seasonal demand weakens or becomes less predictable?



- **Performance-driven creative leads**
  36% focus more on performance-driven creative when seasonal demand weakens, while 30% increase creative production volume.

Which response has been most effective for your team when the usual seasonal pattern does not hold?



- **Testing beats waiting**
  When usual seasonal patterns do not hold, the most effective response is increasing creative testing at 26%, followed by tightening audience strategy at 23%.

- **Creative is now a performance lever**
  Creative is not just campaign packaging. It is one of the fastest ways teams adjust to changing demand signals.

Audience Refinement Is the Top Growth Lever

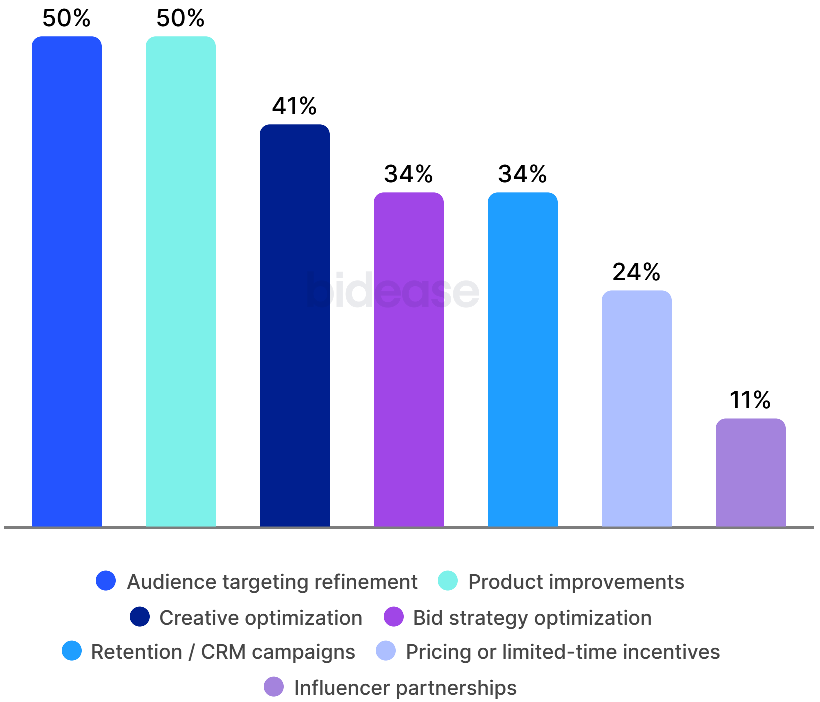
- **Targeting becomes one of the top levers**
  50% cite audience targeting refinement as a primary growth lever when seasonal offers or demand spikes are weaker than expected.

- **Product and creative also matter**
  50% cite product improvements, while 41% cite creative optimization, showing that growth depends on both campaign execution and the customer experience after acquisition.

"Creative is no longer just about fresh visuals. It is part of performance optimization. The best teams watch the data closely, understand when fatigue sets in, and test new concepts before performance drops too far."

Olya Ulyanova, Head of Product, Bidease

When seasonal offers or demand spikes are weaker than expected, what becomes your primary growth lever?



Conclusion

MENA app growth has not slowed, but the market is no longer moving in clean, predictable cycles. Seasonal peaks still matter, yet performance now varies more clearly across quarters, markets, and categories.

The GCC's maturity is changing how growth should be read. Engagement, monetization, and long-term user value are becoming stronger indicators of where growth is truly happening.

Marketers are not pulling back. Budgets are rising, channel mixes are expanding, and the strongest teams are responding faster when familiar signals weaken.

That is the central takeaway from this report: growth is strong across the region, but the advantage belongs to teams that can read the market clearly, act quickly, and optimize continuously as conditions shift.

By combining **Sensor Tower's market intelligence** with **Bidease's perspective** on app growth and user acquisition, this report helps marketers understand where demand is moving and what kind of growth each opportunity is likely to produce.

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Built on Sensor Tower's market intelligence and Bidease's survey insights from 400 app marketers.

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Founded in 2013, Sensor Tower's mobile app insights have helped marketers, app, and game developers demystify the mobile ecosystem with visibility into usage, engagement, and paid acquisition strategies. Today, Sensor Tower's digital market insights platform includes Website, Gaming, Audience, Retail Media, and Pathmatics Digital Advertising Insights, unlocking access to the most comprehensive competitive intelligence in the digital economy.

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