Sensor Tower

Report

State of Mobile 2026

The industry's leading report

Executive Summary | Key Takeaways

01

Generative AI Defined Mobile in 2025

AI assistants reached massive user bases and expanded into new use cases, while generative AI became a key growth driver across the mobile ecosystem.

02

Mobile Entered a Monetization-First Era

The mobile market is mature but far from stagnant, with growth shifting decisively toward monetization as leading apps deploy increasingly diverse revenue strategies.

03

Gaming Continues Shift From Scale To Efficiency

With UA costs elevated, winners sustained growth by improving unit economics via deeper monetization and live ops discipline, supported by high-attention ad formats.

04

Non-Game Apps Surpassed Games for Mobile Revenue

For the first time, consumers spent more on non-game apps than games in 2025, fueled by strong revenue growth across generative AI, social media, video streaming, and productivity.

05

The Attention Economy Spans Categories

Games now compete with social, short-form drama, and AI apps for time spent. Capturing attention is the clearest path to monetization, retention, and long-term growth.

06

Mobile is Global — But Knowing Your Market is Key

Mobile is increasingly interconnected, yet country-specific forces (like tariffs and regulations) make deep market knowledge critical, from retail to sports betting.

Executive Summary | Mobile Landscape at a Glance

New App Downloads

149
Billion

+0.8%
YoY Growth

iOS & Google Play

284,000 apps downloaded per minute in 2025

In-App Purchase (IAP) Revenue

$167
Billion

+10.6%
YoY Growth

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

$318,000 spent per minute in 2025

Total Hours Spent

5.3
Trillion

+3.8%
YoY Growth

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

>600 hours on average for every person on Earth in 2025

Average Time Spent per User

3.6
Hours per Day

+1.1%
YoY Growth

iOS & Android Across 80 Markets (Excludes China)

>13 minutes per waking hour

of Apps Used per User

34
Per Month

+5.4%
YoY Growth

iOS & Android Across 80 Markets (Excludes China)

10 unique apps used each day per user on average

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Sensor Tower | Our Customers

Top publishers trust Sensor Tower insights to grow their business.

L'ORÉAL	CNN	Google	EA	European Commission	Disney
petco	HERSHEY'S	amazon	ROVIO	DOORDASH	depop
Walmart	chewy	Microsoft	SEGA	Coca-Cola	SONY
fetch REWARDS	Pizza Hut	Meta	OUTFIT7	Gett.	ByteDance
Alibaba.	Zillow	Tencent 腾讯	WARNER BROS. GAMES	P&G	NBA
CVS Health.	Domino's	Kenvue		Welch's	Revolut

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

About this data:
Methodology

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

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

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

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

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

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

View Detailed Report Methodology Here.

Sensor Tower

Interested in our Digital Market Insights Solutions?

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

Request a free demo!

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

01

Macro Mobile Trends

The mobile market is both mature and global. While downloads and time spent are stabilizing, IAP revenue is soaring, domestic app economies are expanding, and AI-powered apps are reshaping the landscape.

"Sensor Tower helps guide our mobile app strategy by surfacing trends, competitive signals, and performance insights that let us move faster and make smarter choices—all in service of creating the best consumer experience possible!"

Lianna Shepard
Business Lead myPurina
Purina

Top Markets Reflect a Maturing Mobile Economy Entering 2026

In 2025, most top markets remained stable, with downloads and time spent holding fairly constant year-over-year (YoY). As growth plateaus, mobile publishers are increasingly shifting their focus to monetization, driving strong gains in in-app purchase (IAP) revenue across one-time purchases, subscriptions, and paid apps and games.

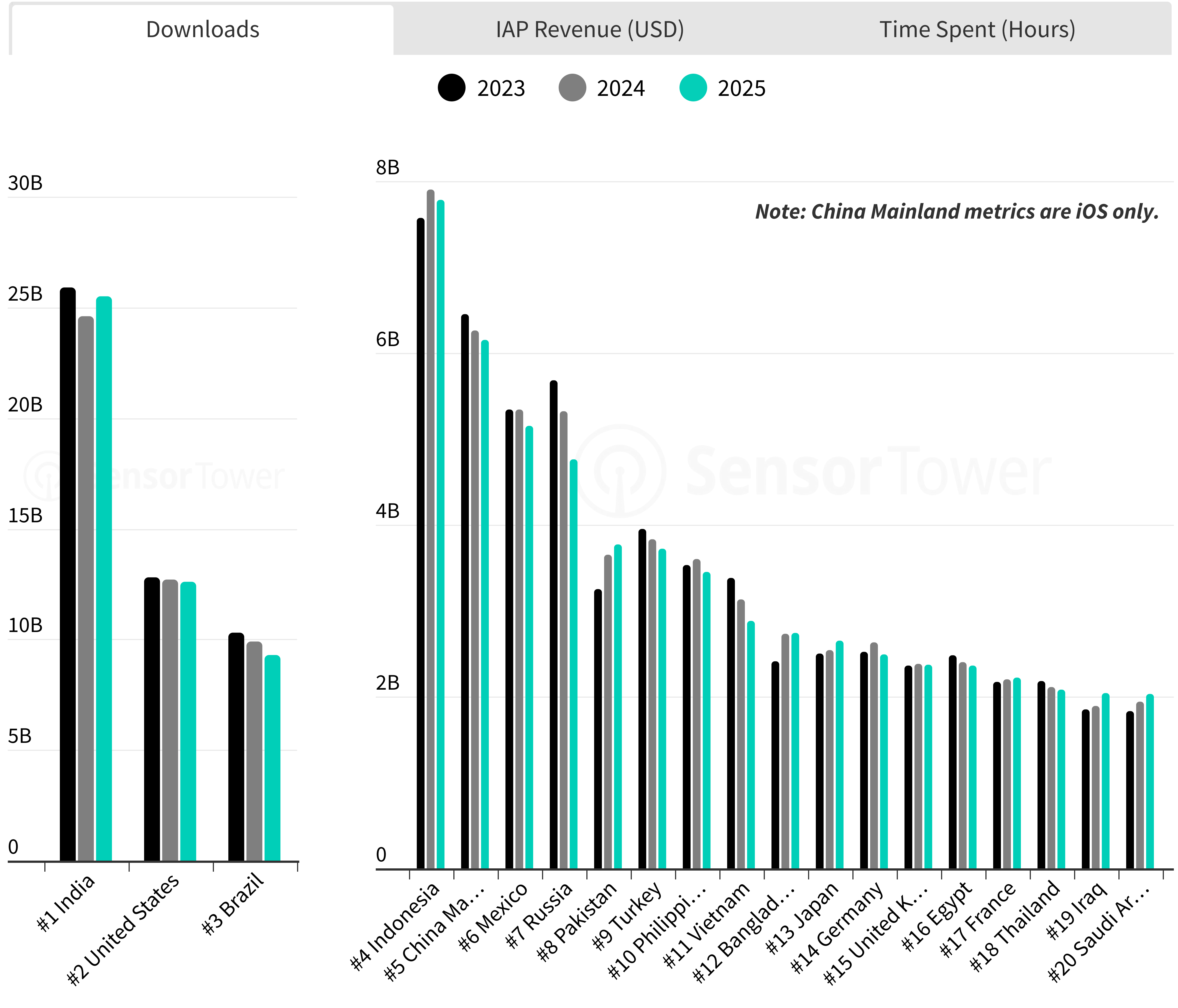
Looking at new user acquisition, India and Pakistan were the only two markets among the top 10 to achieve positive YoY download growth. India's rebound was particularly notable following a significant decline in 2024.

The United States remained the largest mobile market by revenue, with consumers spending nearly $60 billion in 2025. Western European markets also contributed to growth, led by the United Kingdom, Germany, and France. Meanwhile, time spent continued to level off across many regions. The United States saw only a modest uptick in 2025, while several other top markets experienced YoY declines in mobile time spent.

Want to See the Latest App Trends in Your Market?
Request a demo to see Sensor Tower's latest offerings covering 100+ different countries.

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

Top 20 Mobile Markets in 2025



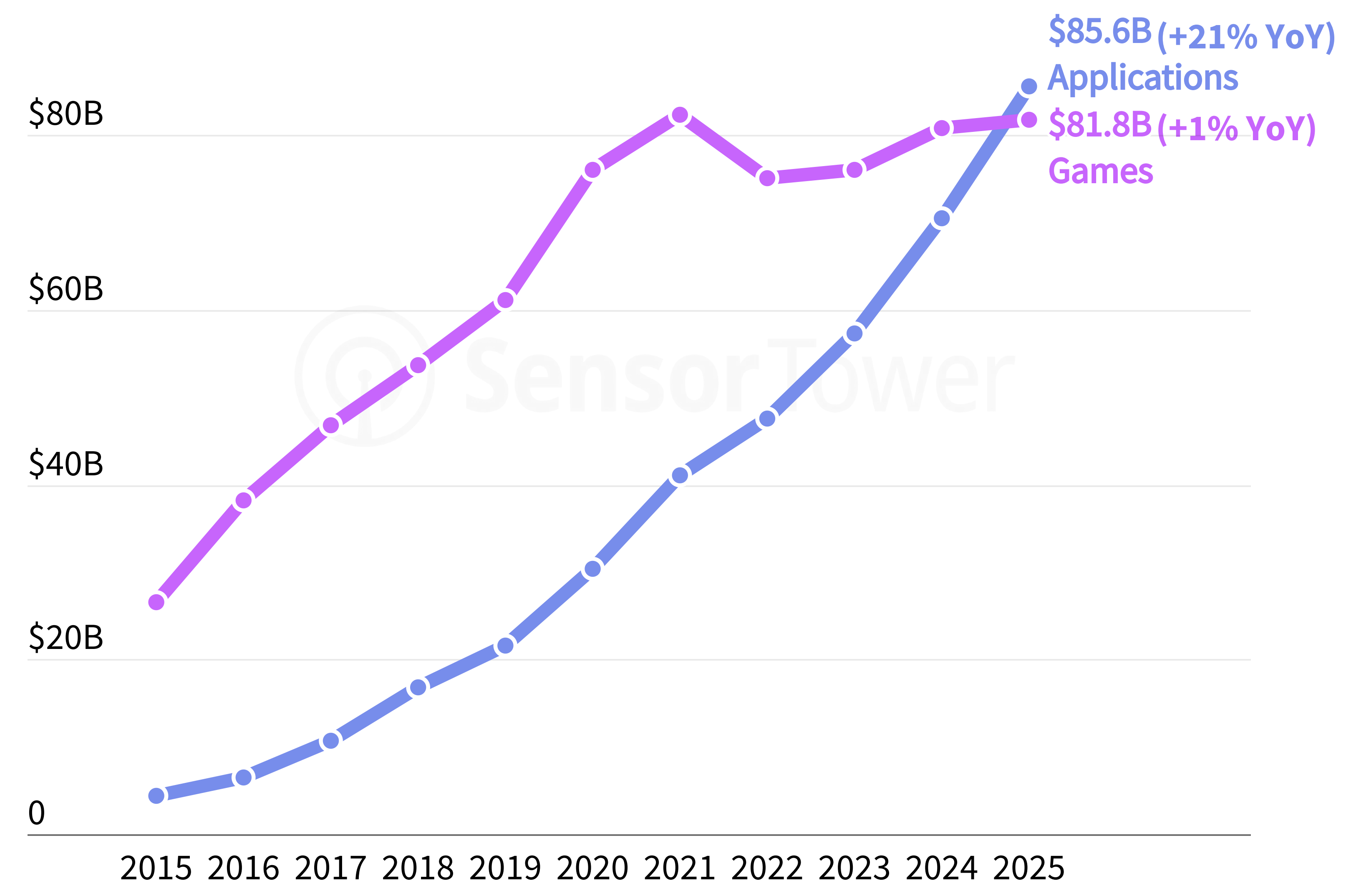
State of Mobile 2026

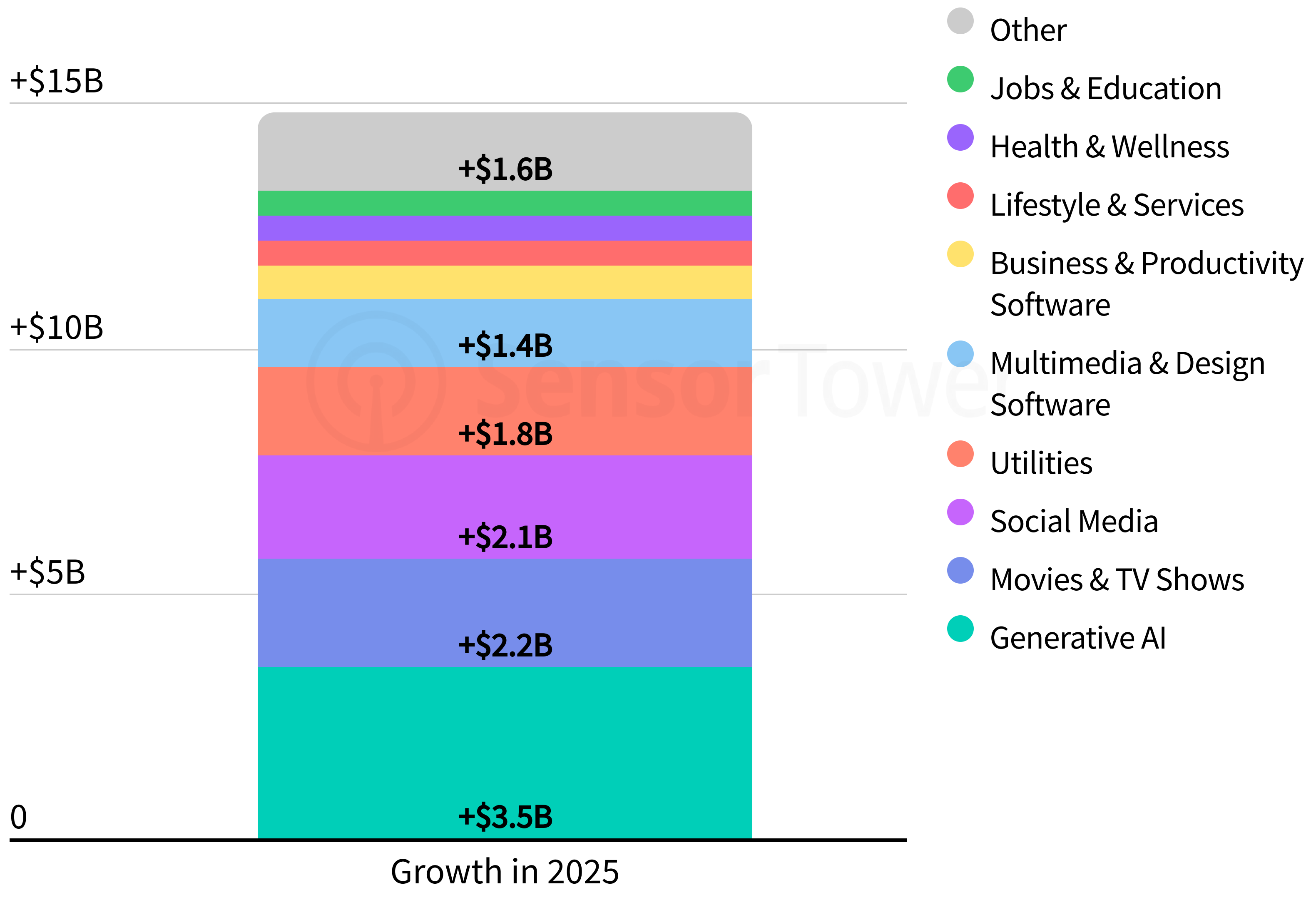
Consumers Spent More in Apps Than Games for the First Time

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

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





Generative AI and Short Drama's Ascent Offsets Download Declines Across Most Subgenres

AI Assistants (+148% YoY) and Short Drama (+278% YoY) stood out as major outliers in 2025, posting exceptional download growth. Both subgenres began breaking out in 2023–2024 and continued to accelerate through 2025. See the Generative AI and Video Streaming sections for a deeper dive.

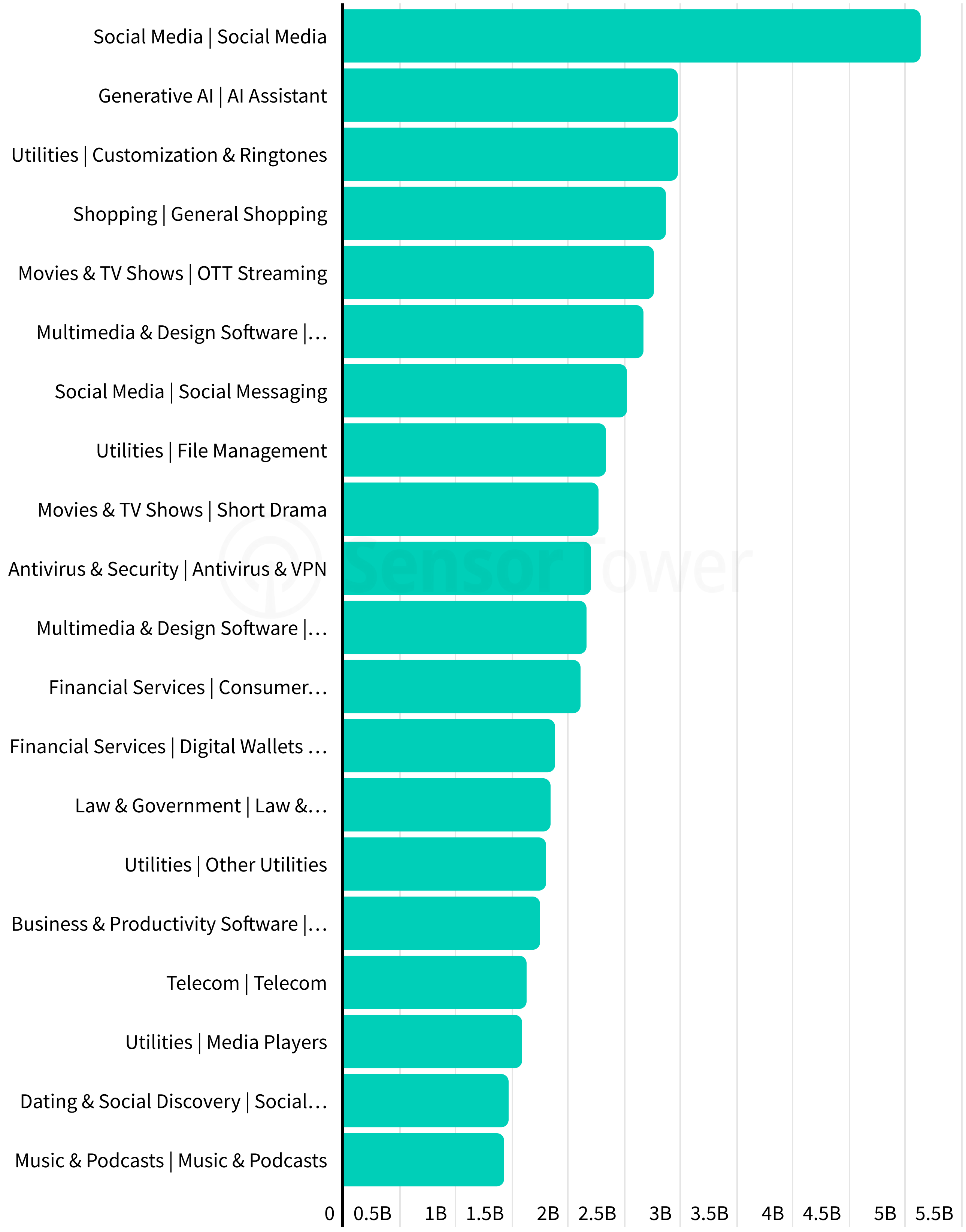
Most leading subgenres are now well established, with limited room for new entrants as many consumers already have many of the apps they need. As a result, downloads declined YoY across several major categories, including Social Media, General Shopping, OTT Streaming, and Music & Podcasts.

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 nearly 200 different classifications for non-game apps. Sensor Tower customers can try the link here.

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

Top 20 App Subgenres by Downloads in 2025

Worldwide



Subgenre	YoY Growth	#1 App in the Subgenre
Social Media | Social Media	-11%	TikTok
Generative AI | AI Assistant	148%	ChatGPT
Utilities | Customization & Ringtones	-11%	TickTock-TikTok Live Wallpaper
Shopping | General Shopping	-3%	Temu
Movies & TV Shows | OTT Streaming	-9%	Netflix
Multimedia & Design Software |…	0%	Remini
Social Media | Social Messaging	-15%	WhatsApp Messenger
Utilities | File Management	31%	Samsung Smart Switch Mobile
Movies & TV Shows | Short Drama	278%	DramaBox
Antivirus & Security | Antivirus & VPN	-22%	VPN - Super Unlimited Proxy
Multimedia & Design Software |…	10%	CapCut
Financial Services | Consumer…	8%	Nubank
Financial Services | Digital Wallets …	4%	PhonePe
Law & Government | Law &…	17%	DigiLocker
Utilities | Other Utilities	-7%	夸克-AI旗舰应用
Business & Productivity Software |…	-1%	WhatsApp Business
Telecom | Telecom	2%	Airtel Thanks
Utilities | Media Players	6%	All Video Downloader & Player
Dating & Social Discovery | Social…	26%	Litmatch
Music & Podcasts | Music & Podcasts	-8%	Spotify

Double-Digit Revenue Growth Was Common Across Top Subgenres

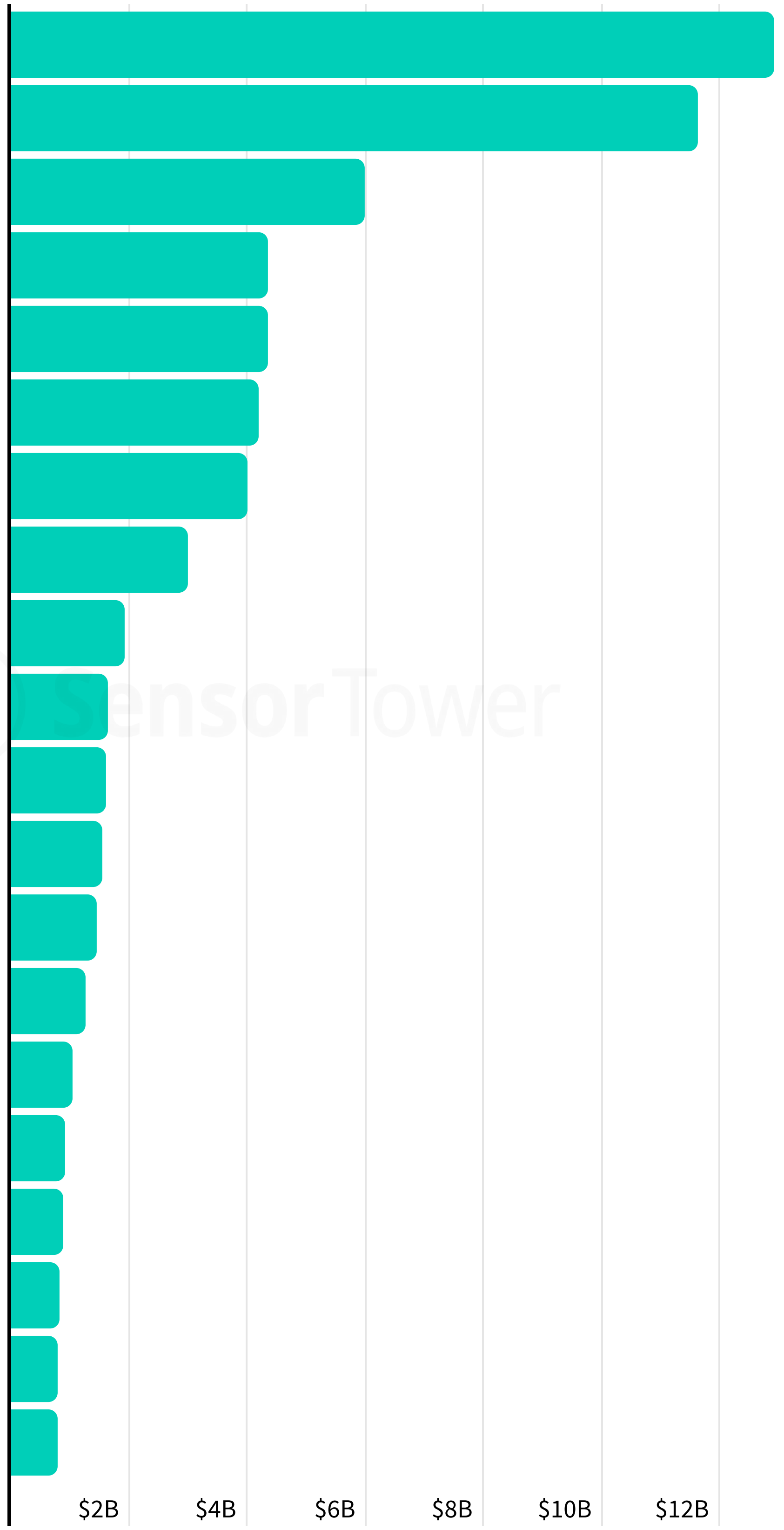
Fifteen of the top 20 subgenres delivered IAP revenue growth of at least 10% YoY, with several far exceeding that threshold. AI Assistants and Short Drama once again led the way, alongside strong gains from Video Editing apps such as CapCut.

Social Media, OTT Streaming, and Dating remained the largest sources of IAP revenue among non-game apps. However, growth is beginning to slow for these mature subgenres. Many leading apps were early adopters of subscription and innovative one-time purchase monetization models, and other subgenres are now replicating these proven strategies, narrowing the gap.

Will ChatGPT Become the Top App in 2026?
Check out our Six Predictions for 2026 report — including a look at how ChatGPT's rapid ascent could challenge TikTok for the top spot for IAP revenue.

Top 20 App Subgenres by IAP Revenue in 2025

Worldwide



Subgenre	YoY Growth	#1 App in the Subgenre
Social Media | Social Media	17%	TikTok
Movies & TV Shows | OTT Streaming	5%	Disney+
Dating & Social Discovery | Dating	3%	Tinder Dating App
Utilities | Cloud Storage	31%	Google One
Generative AI | AI Assistant	254%	ChatGPT
Books & Comics | Books & Comics	-1%	Audible
Music & Podcasts | Music & Podcasts	12%	QQ Music
Movies & TV Shows | Short Drama	115%	ReelShort
Multimedia & Design Software |…	71%	CapCut
Social Media | Social Messaging	24%	Telegram
Multimedia & Design Software |…	15%	Meitu
Jobs & Education | Language…	21%	Duolingo
Dating & Social Discovery | Social…	9%	Azar
Health & Wellness | Gyms & Fitness	15%	Strava
Jobs & Education | Other Jobs &…	15%	LinkedIn
Social Media | Live Streaming	-9%	BIGO LIVE
Antivirus & Security | Antivirus & VPN	23%	NordVPN
Health & Wellness | Nutrition & Diet	16%	MyFitnessPal
News & Magazines | News &…	14%	NYTimes: US and Global News
Multimedia & Design Software |…	26%	Canva

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

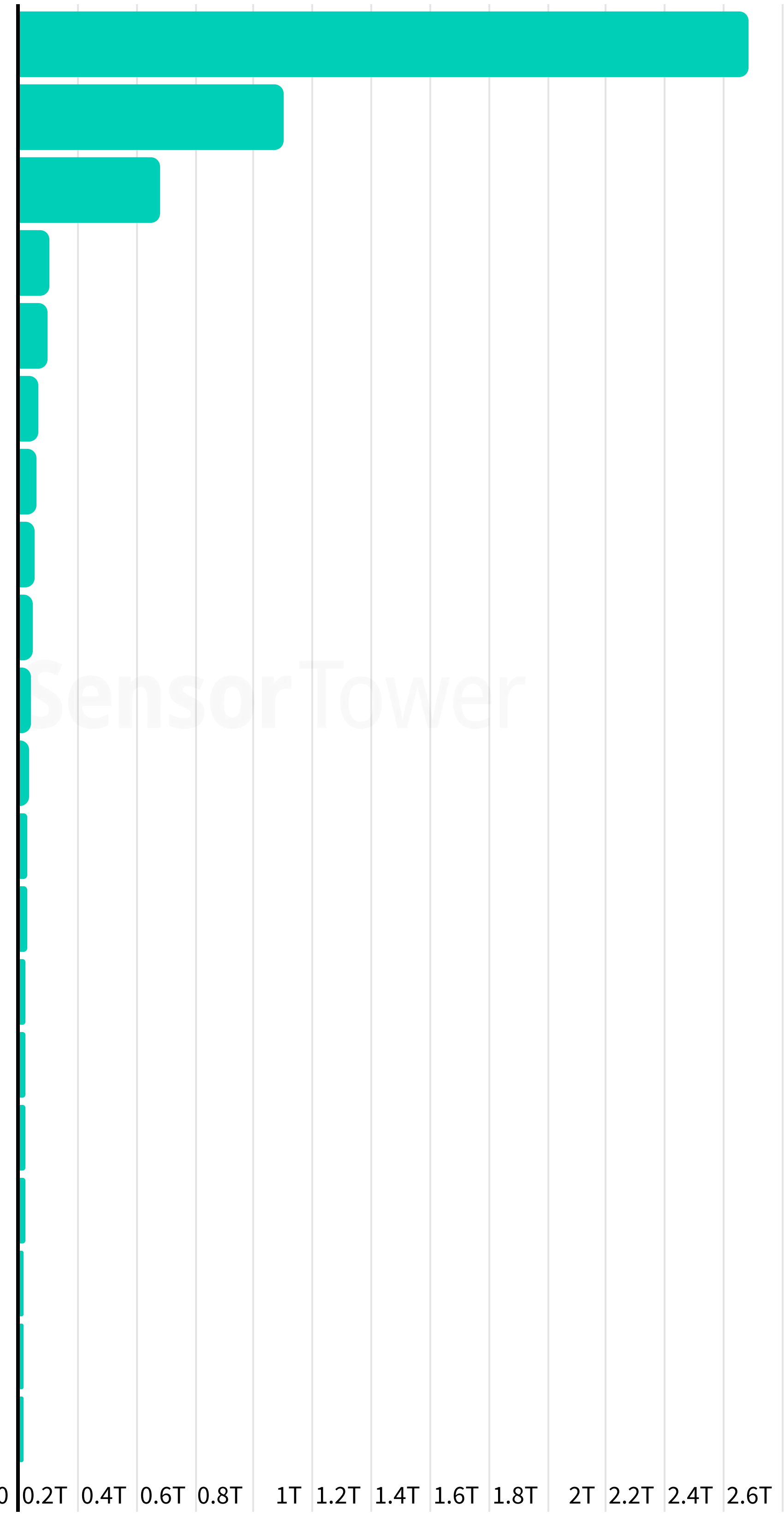
Consumers Spent Nearly 2.5 Trillion Hours on Social Media Apps — More Than 90 Minutes per Day for the Average Mobile User

Mobile users spent nearly 2.5 trillion hours on social media apps across iOS and Android in 2025, up 5% YoY. Overall time spent on mobile is stabilizing following a period of rapid smartphone adoption and pandemic-driven demand.

AI continues to make its mark on mobile. AI Assistants became a top 10 subgenre by time spent in 2025 (+426% YoY). While AI Companions have yet to crack the top 20, they are gaining significant traction. The subgenre now ranks 23rd globally following a robust 68% increase in time spent.

Top 20 App Subgenres by Total Time Spent (Hours) in 2025

Worldwide



Subgenre	YoY Growth	#1 App in the Subgenre
Social Media | Social Media	5%	YouTube
Social Media | Social Messaging	0%	WhatsApp Messenger
Utilities | Browsers	1%	Google Chrome
Movies & TV Shows | OTT Streaming	2%	JioHotstar
Business & Productivity Software |…	14%	WhatsApp Business
Travel & Tourism | Navigation &…	6%	Google Maps
Shopping | General Shopping	0%	Shopee
Utilities | Calling & SMS	-1%	Phone by Google
Music & Podcasts | Music & Podcasts	5%	Spotify
Generative AI | AI Assistant	426%	ChatGPT
Utilities | Customization & Ringtones	11%	POCO Launcher 2.0 - Customize,
Utilities | Media Players	-9%	PLAYit-All in One Video Player
Business & Productivity Software |…	-2%	Gmail
Utilities | Other Utilities	9%	Clock
Books & Comics | Books & Comics	-5%	Fizzo - Novel & Drama
Financial Services | Consumer…	5%	Nubank
Multimedia & Design Software |…	8%	Google Photos
Financial Services | Digital Wallets…	13%	PhonePe
Business & Productivity Software |…	-4%	Zoom Workplace
Multimedia & Design Software |…	0%	CapCut

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

AI Assistants and Short Drama Were the Breakout Subgenres

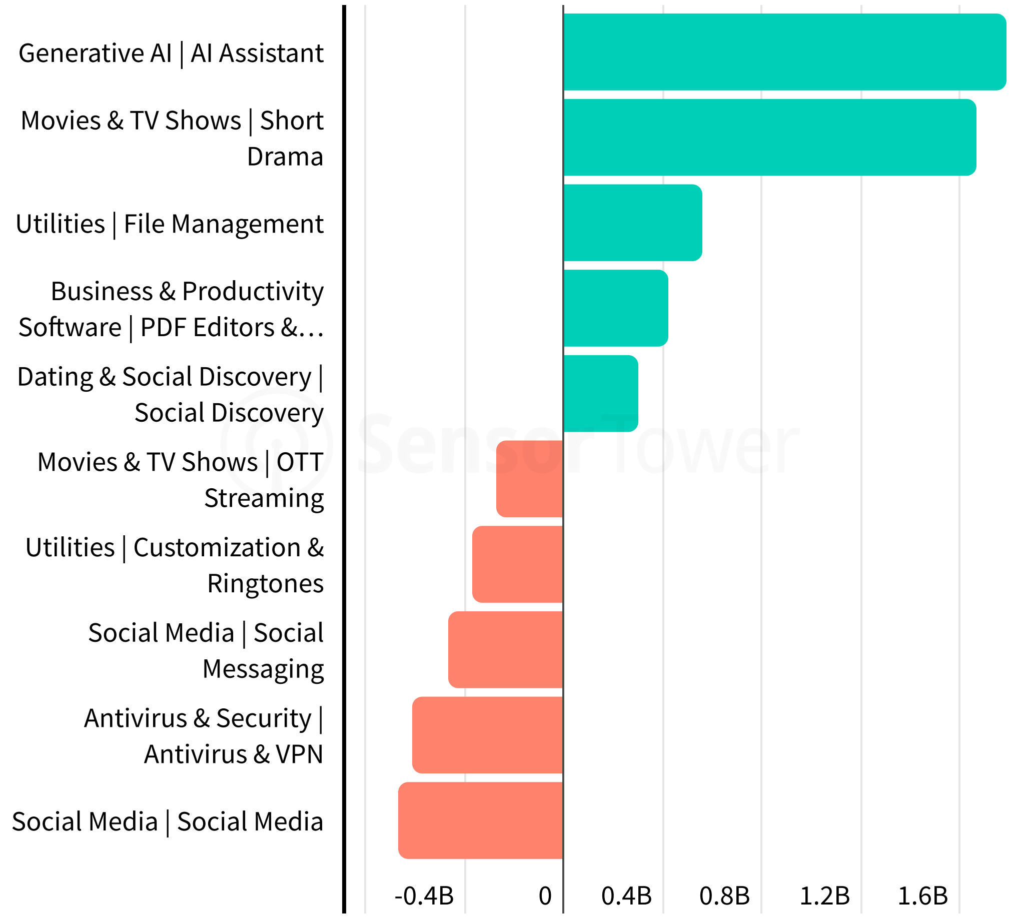
AI Assistants and Short Drama emerged as breakout subgenres across key mobile metrics in 2025, ranking among the top three by growth in downloads and IAP revenue. Social Media remains the unrivaled leader in absolute time spent increases due to its massive scale, though it delivered far lower growth on a percentage basis. Scroll through the different markets to see where AI Assistants are gaining traction the fastest and which regions may still present opportunities for growth.

Get the Latest Mobile Insights
Sensor Tower's Mobile App Insights helps you run market research and analyze competitor moves, with a granular App IQ taxonomy for easy comparisons.

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

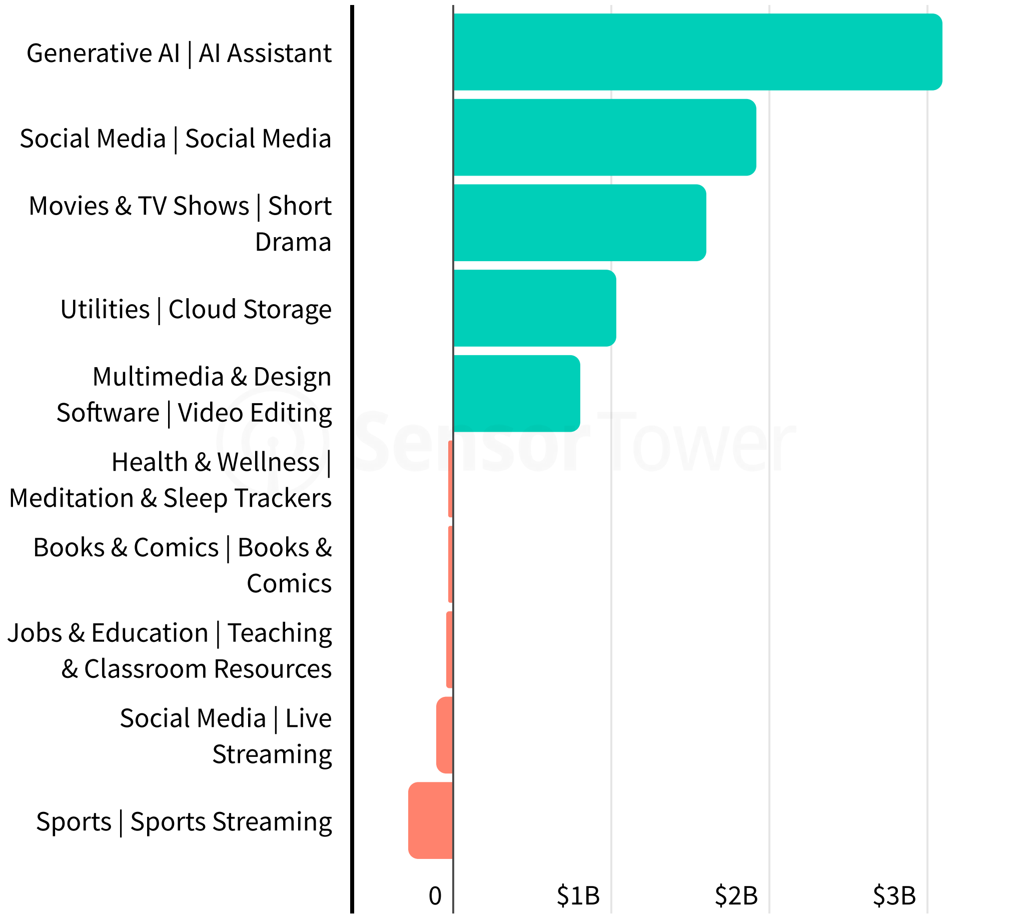
Downloads
App Growth 2025 YoY

Worldwide



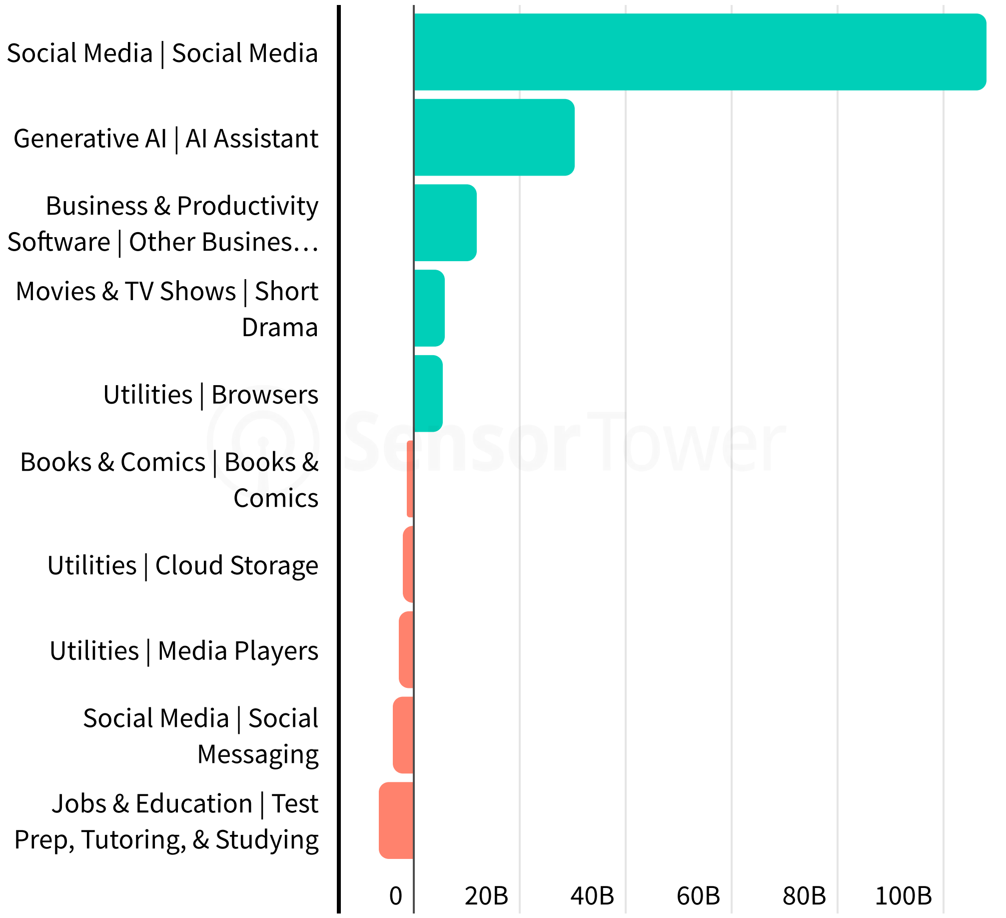
IAP Revenue
App Growth 2025 YoY

Worldwide



Time Spent (Hours)
App Growth 2025 YoY

Worldwide



ChatGPT Headlines Three Apps Joining the Billion-Dollar Club in 2025

Three apps surpassed $1 billion in global IAP revenue for the first time in 2025. ChatGPT blew past this threshold with $3.4B, ranking as the third-highest-grossing app of the year behind TikTok and Google One. Its ascent is historic—no app has ever reached $3B in annual IAP revenue so quickly. CapCut and WeTV followed more traditional paths to the $1 billion milestone as well-established apps.

In contrast, the gaming sector saw a quieter year for new entrants. Pokémon TCG Pocket is closing in on the threshold and is on track to secure a spot in the billion dollar club in 2026.

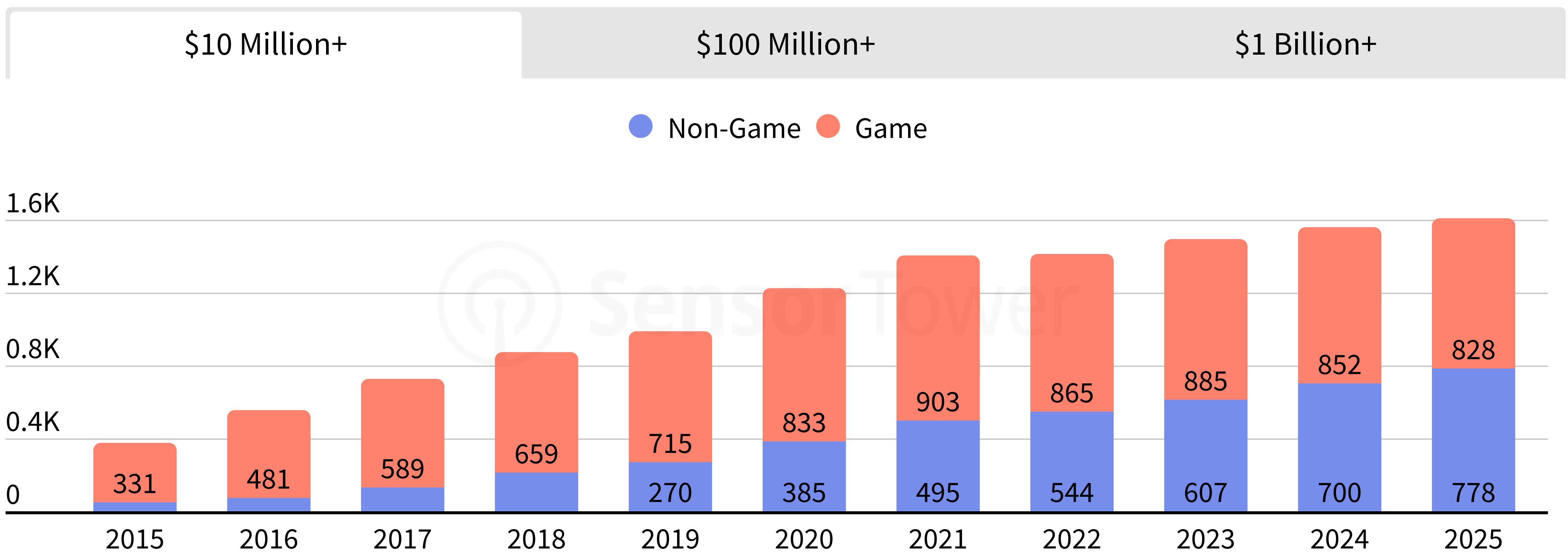
In total, 18 apps reached the billion-dollar milestone in 2025, evenly split between games and non-games. While the number of apps surpassing the $100 million and $10 million annual IAP revenue thresholds have seen relatively modest growth in recent years, expanding monetization opportunities for non-games have driven steady growth in non-game entrants—offsetting recent declines among games.

Explore the Full List of Leaders in 2025

Sensor Tower customers can explore the full list of Top Apps in 2025, 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 Mobile App Insights
Note: iOS and Google Play combined. iOS only for China. Revenue is gross — inclusive of any percent taken by the app stores. 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

Is AI Leading to the Democratization of the App Stores?

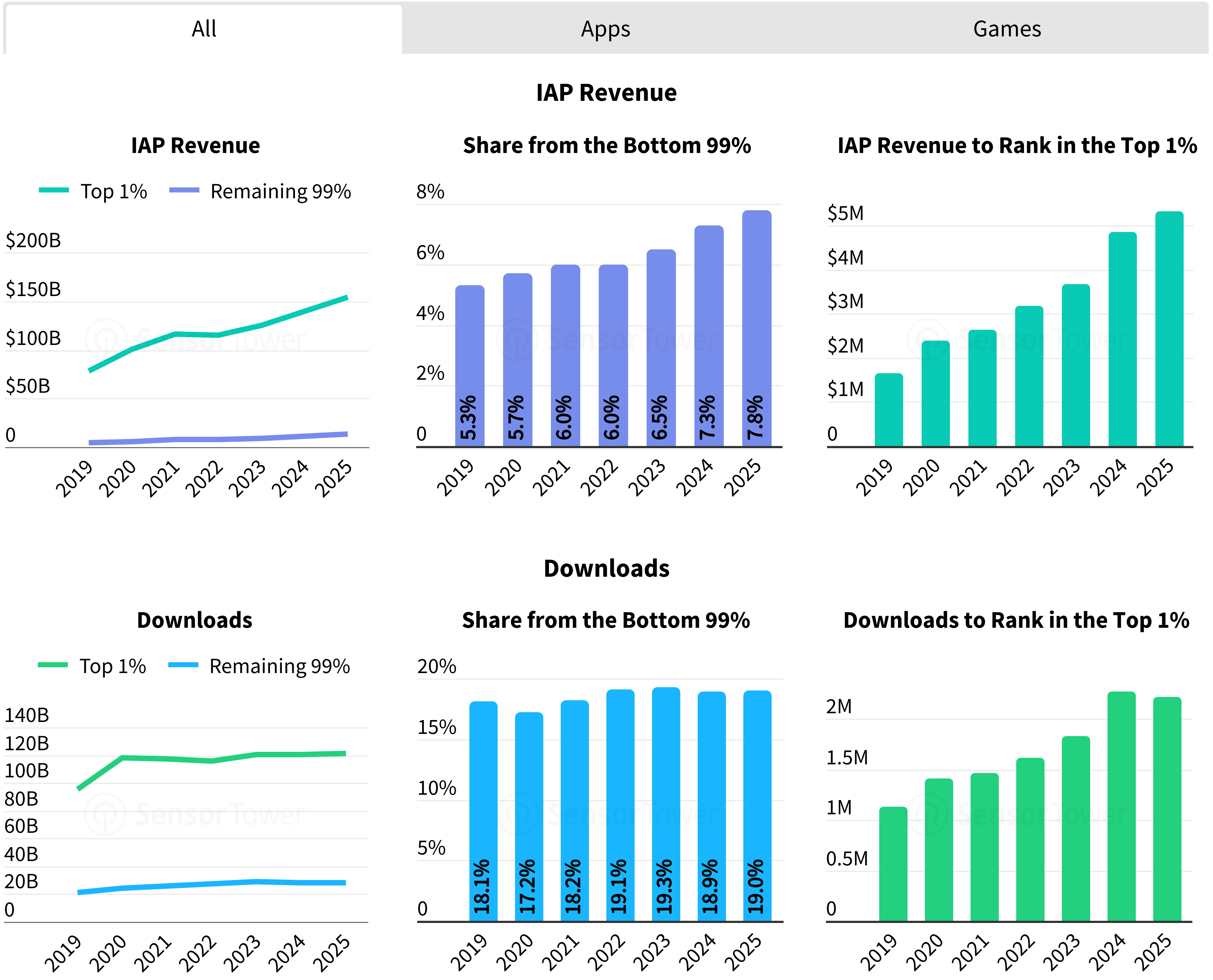
Top publishers continue to command a large share of the mobile market. In 2025, the top 1% of publishers captured 92% of IAP revenue and 81% of downloads. This translated to $154 billion in IAP revenue for the top 1%, compared with just $13.1 billion for the remaining 99% of publishers among those with non-zero revenue tracked by Sensor Tower.

At the same time, the mobile economy is offering more opportunities beyond the largest players. IAP revenue growth among the bottom 99% of publishers is outpacing that of the top 1%. While the bottom 99% accounted for only 8% of IAP revenue in 2025, up from 5% in 2019, growth has accelerated alongside the rise of generative AI on mobile since 2023. Generative AI can help level the playing field in certain cases, such as by speeding up app and game development for smaller publishers.

See the Impact of AI on the Mobile Ecosystem
Download our first State of AI Apps report to discover how AI is reshaping mobile and which genres provide the biggest opportunities for mobile developers.

Source: Sensor Tower Mobile App Insights
Note: iOS and Google Play combined. iOS only for China. Revenue is gross — inclusive of any percent taken by the app stores. Publishers include those with non-zero IAP revenue or downloads among apps tracked by Sensor Tower.

Market Share from the Top 1% of App Publishers



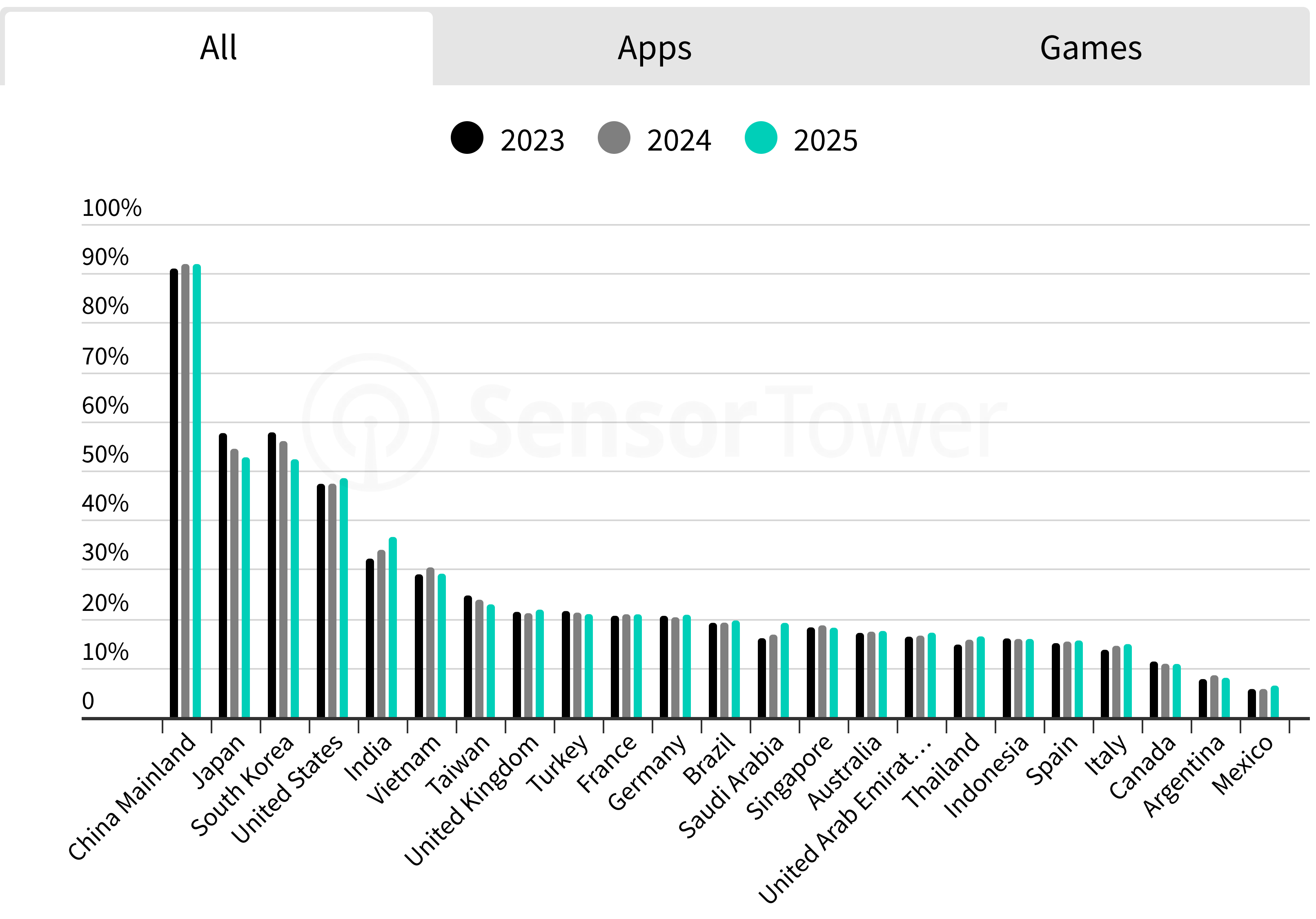
Mobile Is Global: Some Markets Boost Domestic App Economy Amidst Global Competition

Nearly four out of every five app downloads and dollars spent across iOS and Google Play occurred outside the country where the app was developed. The presence of foreign publishers varies significantly by market, and some regions are actively expanding their domestic app industries. India, Singapore, Turkey, and Saudi Arabia are among the markets increasing their revenue share from local publishers.

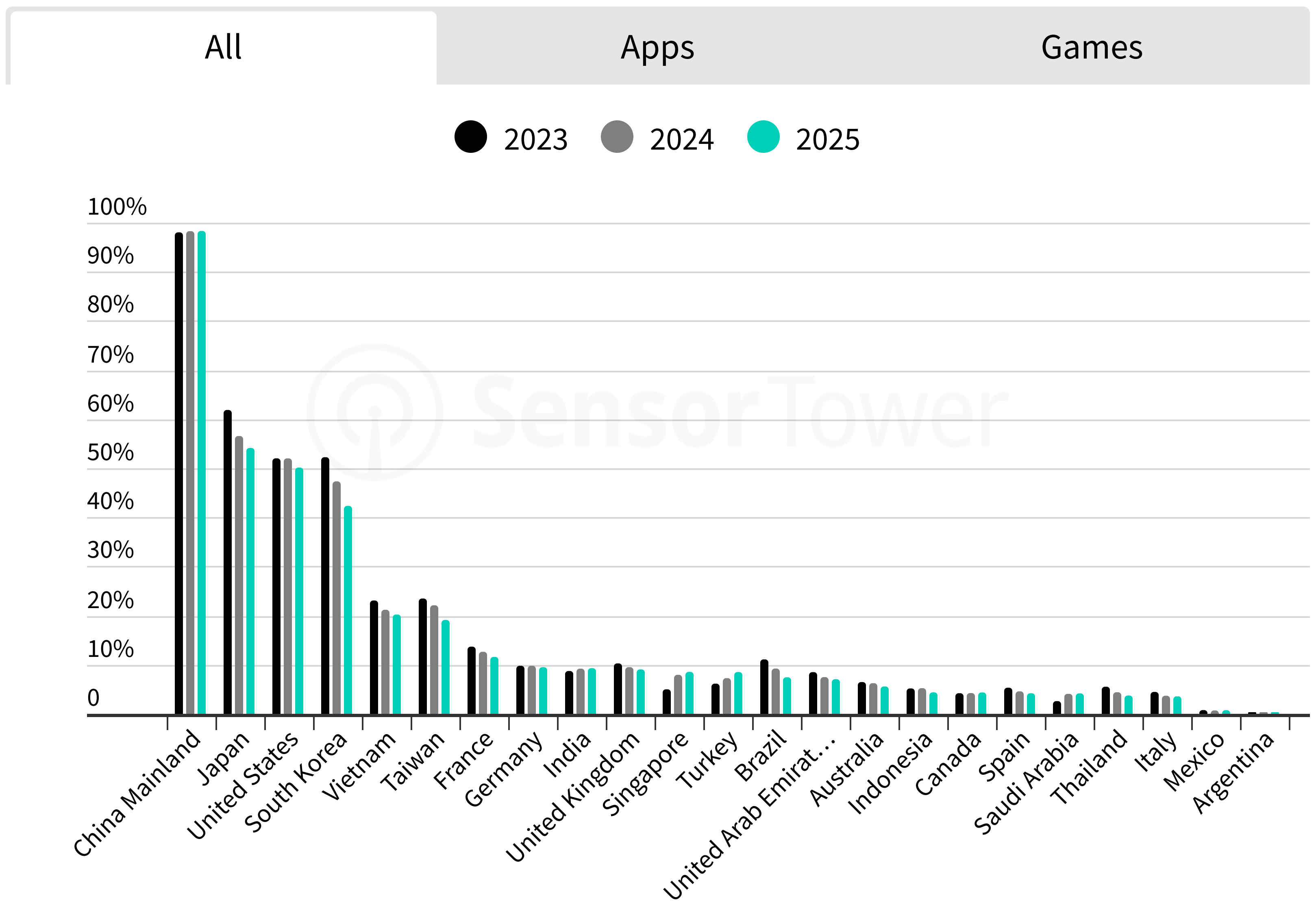
Want to See the Top Publishers in these Markets?
Go to the end of this report for the full lists of top apps, games, and publishers for 2025.

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

Share of Market's Downloads from Domestic Publishers



Share of Market's IAP Revenue from Domestic Publishers



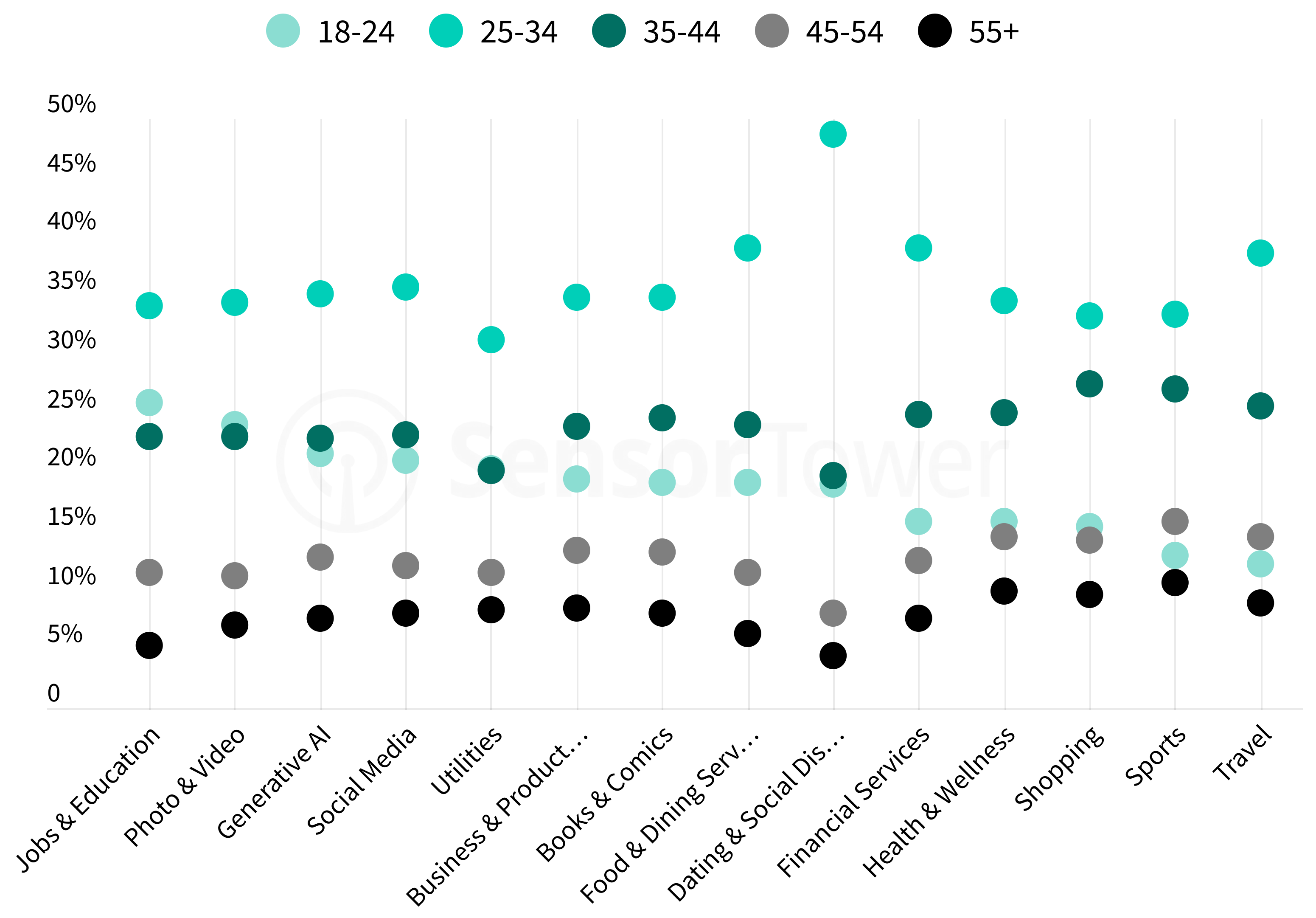
Mobile Connects Users Across Generations

Productivity and creativity-focused categories such as Jobs & Education, Photo & Video, and Generative AI skew younger, as do Social Media apps. In contrast, Travel, Sports, and Shopping apps tend to attract older users. Looking at the top apps by audience share highlights a strong demand for connection on mobile, spanning social platforms like Facebook and TikTok to payment apps such as Venmo. Discord stands out as especially popular among Gen Z, while ChatGPT ranks among the top apps for users aged 35–44 and 45–54.

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

Age Breakdown Among Select Categories
United States in Q4 2025



Top Apps by Share of Audience Using App
United States in Q4 2025

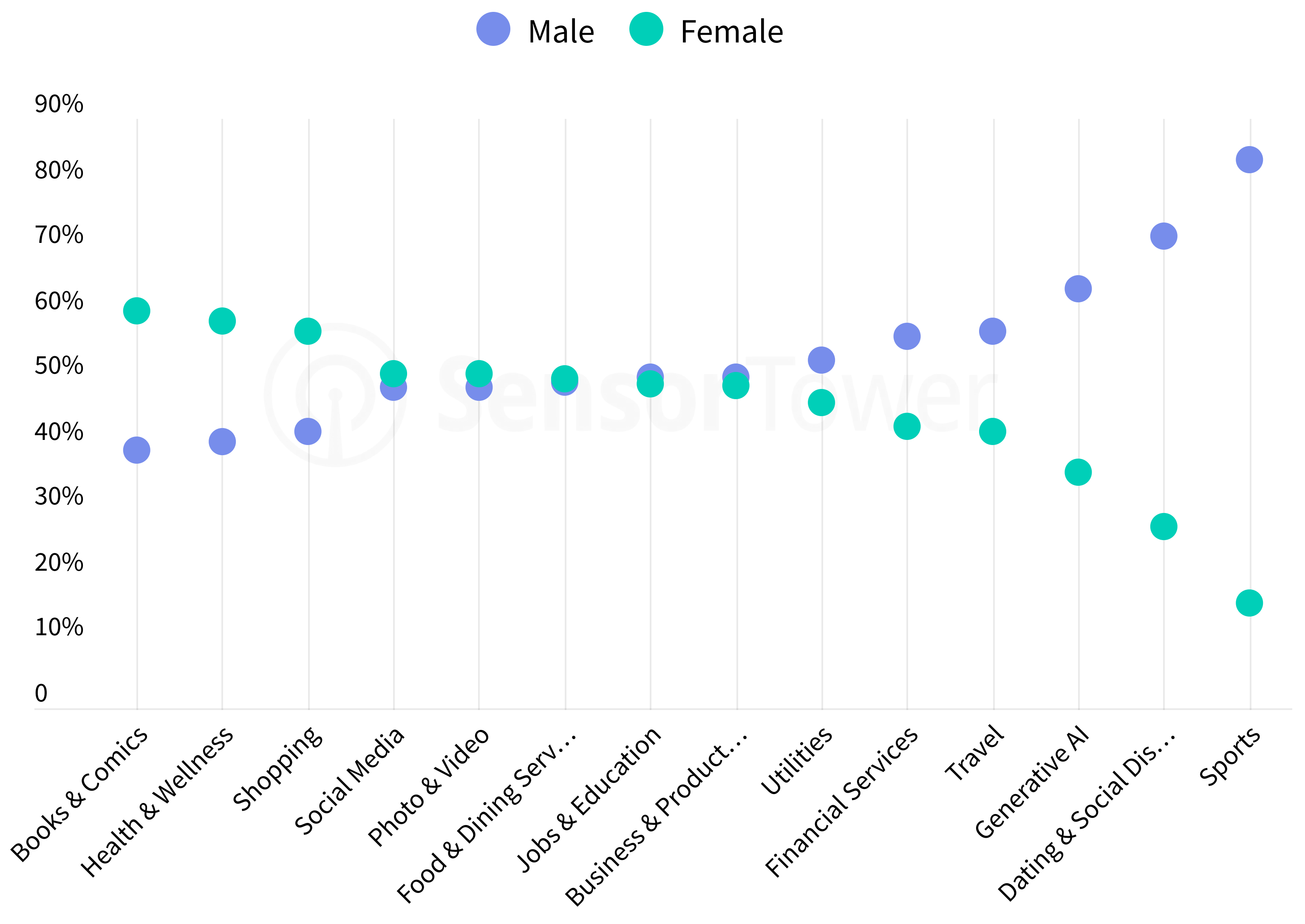
	18-24	25-34	35-44	45-54	55+
1	YouTube	YouTube	YouTube	YouTube	YouTube
2	Instagram	Spotify	Amazon	Amazon	Facebook
3	Spotify	Instagram	Facebook	Facebook	Amazon
4	Discord	Amazon	Instagram	Instagram	Messenger
5	Amazon	Facebook	Messenger	Messenger	Instagram
6	Facebook	Messenger	Spotify	WhatsApp	WhatsApp
7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

ChatGPT is Now a Top 10 App for Men in the US

Books & Comics, Health & Wellness, and Shopping apps are more popular with women in the US on average, while Sports, Dating & Social Discovery, Generative AI, and Travel skew more male. Most top apps maintain broad appeal across genders, but a few stand out with strong single-gender concentration. Discord, ChatGPT, and Reddit rank among the top 10 apps for men only, while Pinterest, TikTok, and Venmo appear exclusively in the top 10 for women.

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

Gender Breakdown Among Select Categories
United States in Q4 2025



Top Apps by Share of Audience Using App
United States in Q4 2025

	Male	Female
1	YouTube	YouTube
2	Instagram	Instagram
3	Spotify	Spotify
4	Amazon	Amazon
5	Facebook	Pinterest
6	WhatsApp	Facebook
7	Discord	Messenger
8	Messenger	WhatsApp
9	ChatGPT	TikTok
10	Reddit	Venmo

02

AI on Mobile

Generative AI entered a new phase on mobile in 2025. Growth accelerated as market leaders pulled ahead, big tech intensified competition, and image and video generation became key drivers of adoption.

“Our vision at Fetch is to be the rewards destination for everyone, and AI is helping us deliver on that goal with speed and quality at scale. Our AI systems are improving how we understand real consumer behavior at the item level and use that intelligence to personalize progression and rewards in ways that feel effortless. It’s how we turn every offer, game, and interaction into content people actually want, helping consumers live rewarded while placing brands at the center of joy.”

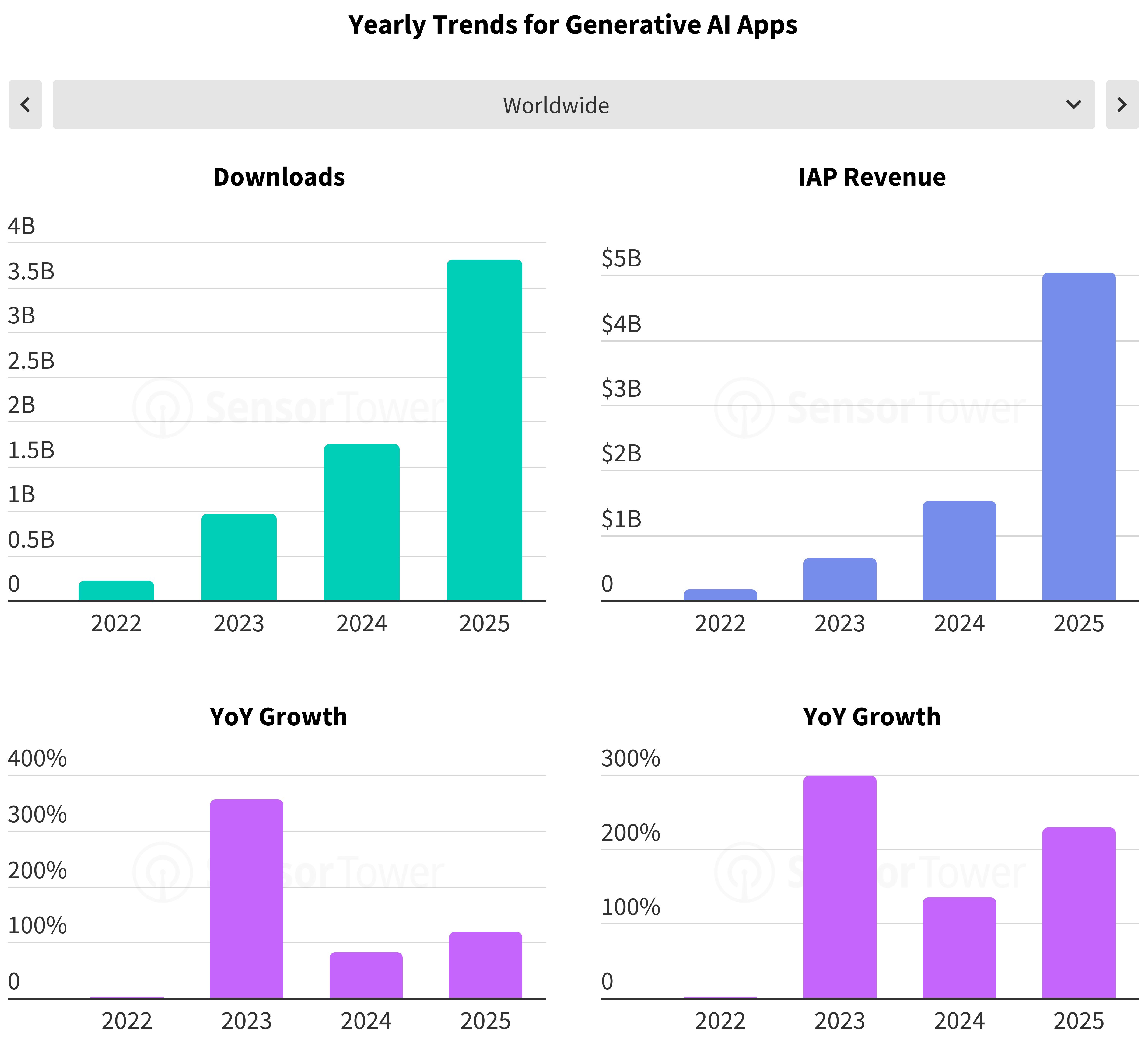
Ayo Jimoh
Chief Product Officer
Fetch

Big Tech and Image Generation Accelerate AI's Ascent in 2025

The rapid rise of AI apps showed no signs of slowing in 2025. On the contrary, both downloads and IAP revenue growth accelerated, surpassing the already high benchmarks set in 2024. Downloads doubled YoY to reach 3.8 billion, while IAP revenue more than tripled to exceed $5 billion.

This momentum reflects a new phase in the AI race. Big tech companies such as Google, Microsoft, and X are investing heavily in their AI Assistants, expanding use cases and rolling out new features in an effort to challenge the market leader, ChatGPT.

Dive Deep into the Latest AI App Trends
Download Sensor Tower's first ever State of AI Apps report to dive deep into the ever-changing competitive landscape of AI.



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

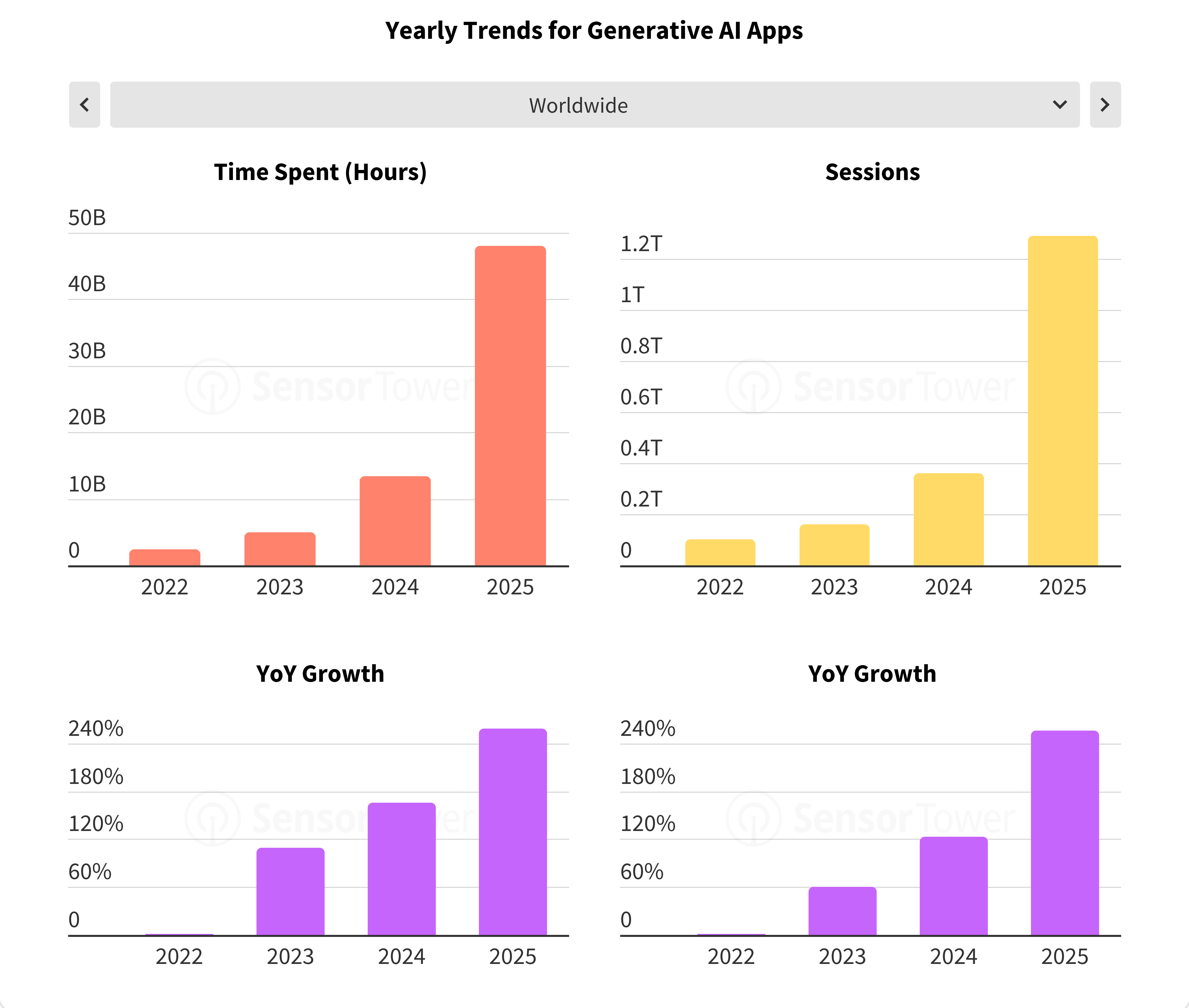
You Have Our Attention: Time Spent in AI Apps Tripled in 2025

Mobile users are no longer just testing new AI offerings—they are integrating them into their daily lives. Time spent in Generative AI apps reached 48 billion hours in 2025, roughly 3.6x the total in 2024 and nearly 10x the level seen in 2023.

Session volume followed a similar trajectory, surpassing one trillion in 2025. The fact that session growth is accelerating faster than downloads suggests Generative AI apps are shifting their focus from acquiring new users to deepening engagement among existing ones.

AI Everyday's Evolution
AI usage has taken off. Read our report diving into the expanding use cases for AI, from shopping to search.

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



AI Assistants' Expanding Features and Use Cases Fuel Growth

AI Assistants are by far the most popular generative AI apps, led by ChatGPT, Google Gemini, and DeepSeek. In 2025, all of the top 10 apps by global downloads in the category were AI Assistants. These apps continue to expand their capabilities, evolving into one-stop destinations for a wide range of AI-powered tasks, including content generation.

At the same time, other AI subgenres are finding room to grow. AI Content Generators such as Suno (AI music generation) and Jimeng AI (ByteDance's text-to-video app) gained traction in 2025. AI Companion apps like Character AI and PolyBuzz also posted strong download volumes, though momentum for the subgenre appears to be slowing.

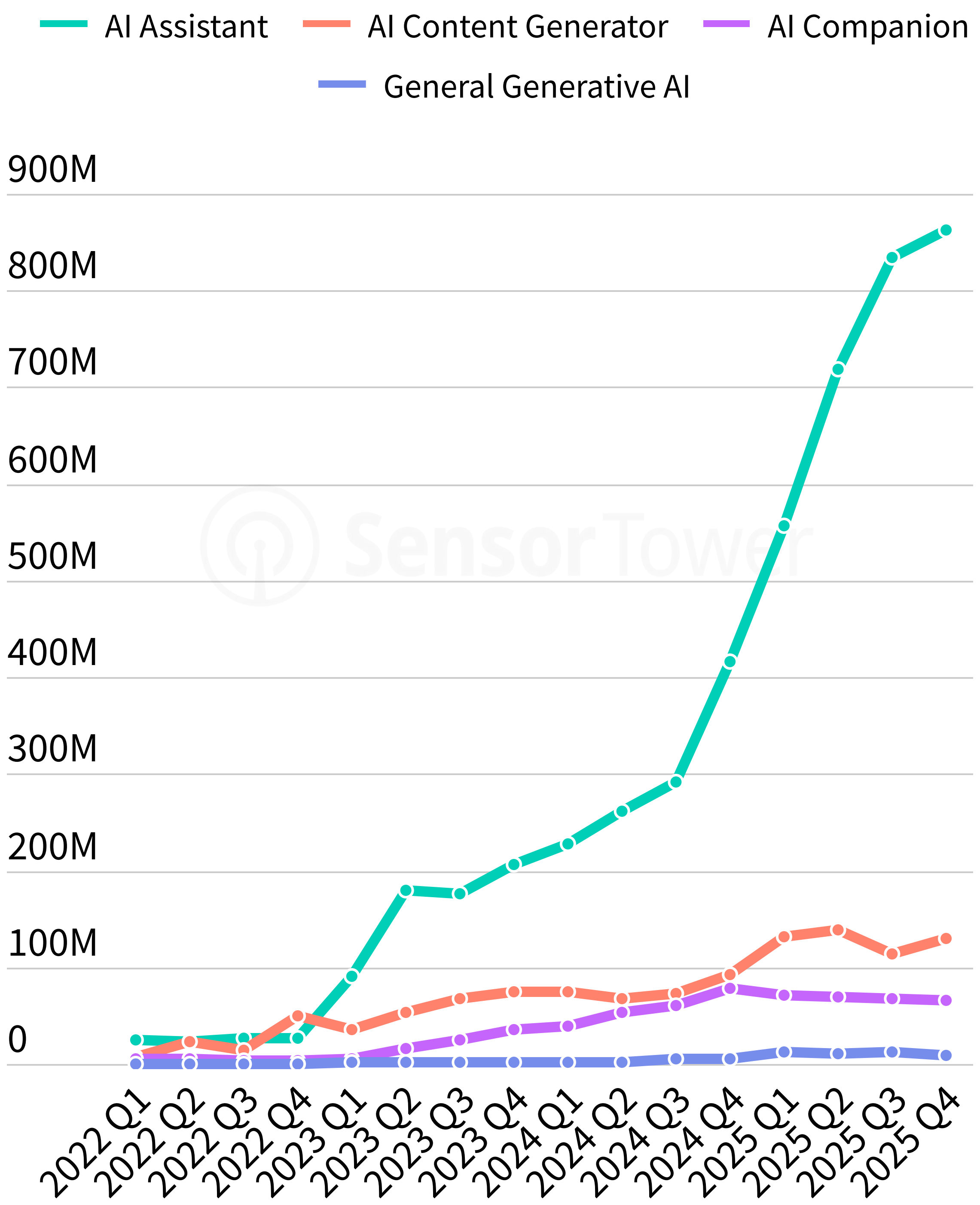
Track the Latest AI Launches with Top Apps
Monitor how the top AI apps are performing in 100+ markets and quickly identify any new breakouts with Sensor Tower's Top Apps and App IQ taxonomy. Sensor Tower customers can check it out here.

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

Generative AI Download Trends by Subgenre

Worldwide

Quarterly Downloads by Subgenre



Top Apps by Downloads in 2025

	App	Subgenre
1	ChatGPT	AI Assistant
2	Google Gemini	AI Assistant
3	DeepSeek	AI Assistant
4	Doubao	AI Assistant
5	Perplexity	AI Assistant
6	Grok	AI Assistant
7	Adobe Acrobat Reader	AI Assistant
8	Seekee	AI Assistant
9	Meta AI	AI Assistant
10	Microsoft Copilot	AI Assistant

AI on Mobile

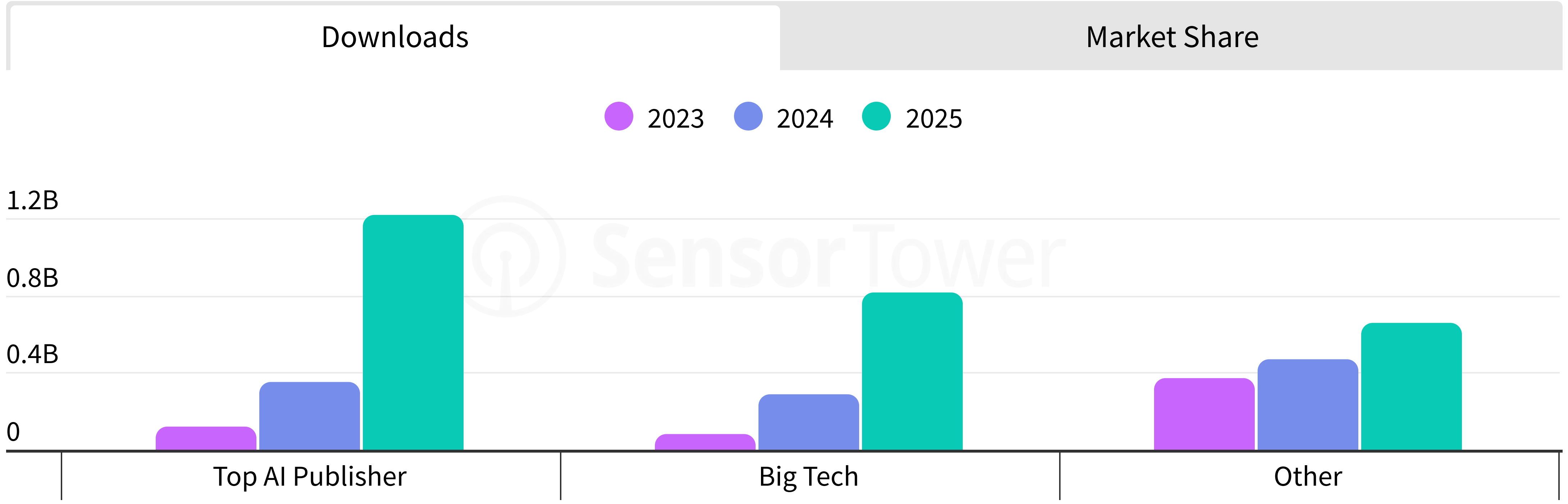
AI Winners Are Emerging

A few years after ChatGPT's launch kick-started the generative AI boom, clear market leaders are beginning to emerge. Early growth beyond ChatGPT was driven by relatively unknown players such as Chat Smith, Codeway, and Nova. By 2025, however, growth is increasingly concentrated among a small group of leading generative AI apps, including ChatGPT and DeepSeek, alongside AI Assistants from major tech companies such as Google, Tencent, and Adobe. For this analysis, ChatGPT and DeepSeek were classified as "Top AI Publishers" since they focus solely on their AI technology, while Big Tech includes long-established tech giants.

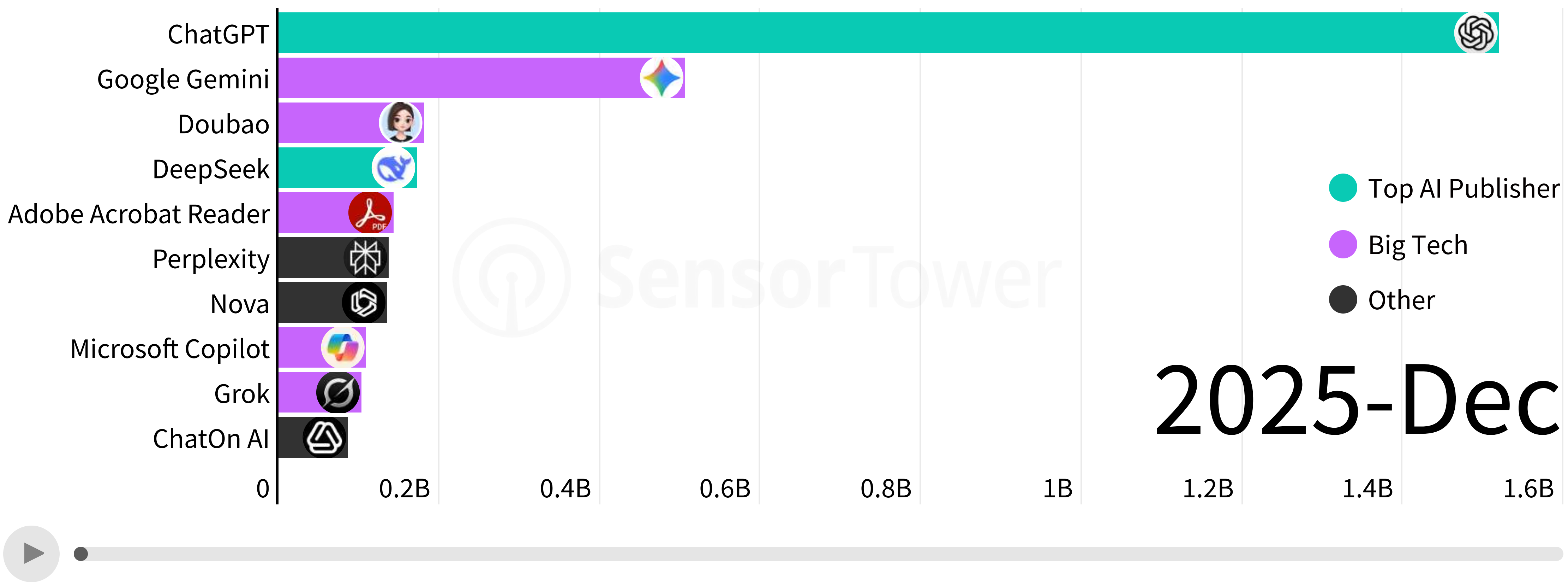
In 2025, the top AI publishers, OpenAI and DeepSeek, accounted for nearly 50% of global downloads, up from just 21% in 2023. Big tech publishers have also gained share over this period, rising from 14% in 2023 to nearly 30% in 2025. As a result, many early competitors have been crowded out, leaving roughly one-quarter of downloads for the remaining apps among the top 25 by downloads.

What About Gen AI Usage?
Downloads don't tell the full story, especially with Google integrating core AI features into its native operating system on Android devices. Learn more about how consumers are using Gemini on Android.

Worldwide Downloads by Publisher Type Among the Top 25 Generative AI Apps Each Year



Cumulative Worldwide Downloads for Generative AI Apps Since January 2023



Source: Sensor Tower Mobile App Insights
Note: iOS and Google Play combined. iOS only for China. Apps classified using Sensor Tower's taxonomy as of January 2026. Adobe Acrobat Reader downloads are only counted after it added its Generative AI functionality.

Mobile Leads the Way for Generative AI Adoption

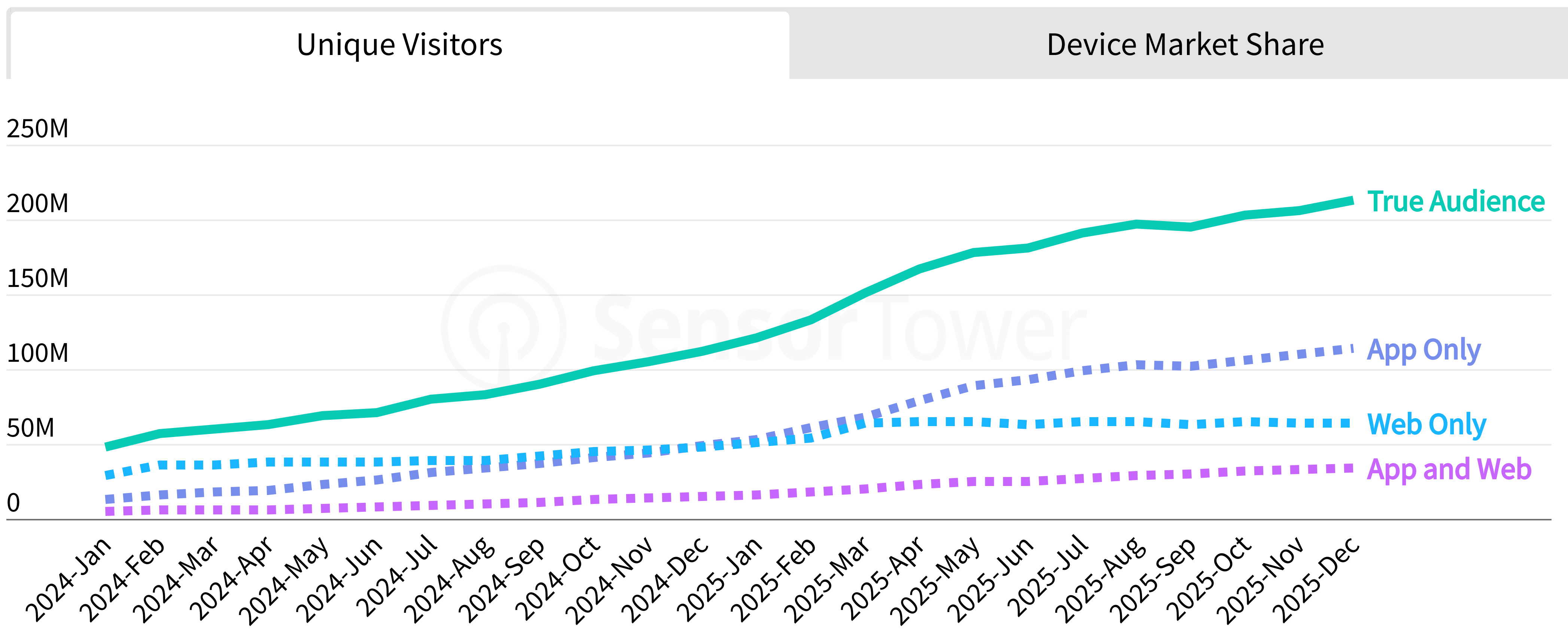
As generative AI adoption has expanded, mobile has emerged as the primary driver of growth. The total true audience, defined as the sum of users across the top 10 generative AI assistants, surpassed 200 million in the United States by the end of 2025. More than half of these users (110 million) accessed generative AI exclusively via mobile apps. By comparison, at the start of 2024, only 13 million users were mobile-only, versus nearly 30 million who used web-only experiences.

AI Assistants are also gaining traction across devices. In December 2025, roughly 16% of users across the top 10 AI Assistants engaged on both mobile and web, marking a new high for cross-device usage. As AI becomes more deeply embedded into daily workflows, mobile is increasingly serving as the primary entry point—and anchor—for generative AI engagement.

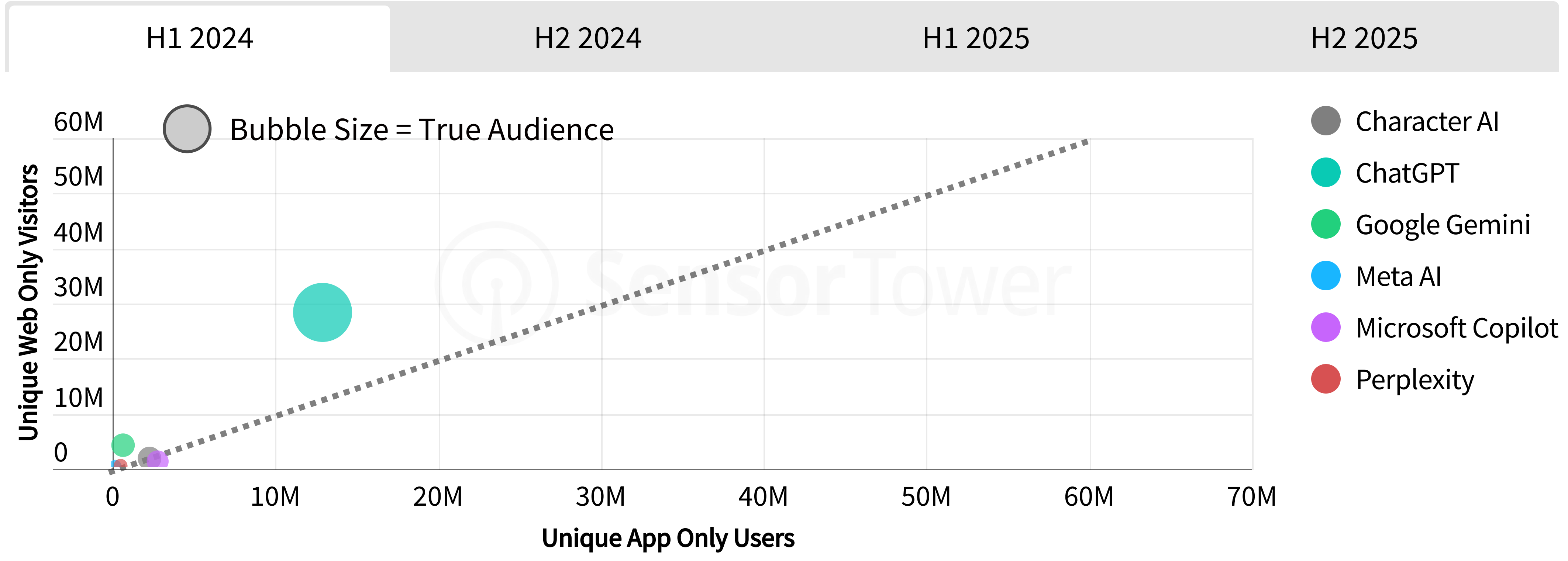
Discover AI's True Audience Across Devices
Connect Sensor Tower's Web Insights with our Mobile App Insights to understand the full consumer journey.

Source: Sensor Tower Web Insights
Note: True audience is defined as the unique visitors across app and web. App users include iOS and Google Play combined. Apps and websites classified using Sensor Tower's taxonomy as of January 2026.

Sum of True Audience Across 10 Top Generative AI Apps and Websites, United States



Average Monthly Unique Visitors for Select Top Generative AI Apps, United States



See Why AI Leaders are So Focused on Image and Video Generation

Expanding content generation capabilities became a central battleground in the AI race in 2025, as leading players competed for new users and deeper engagement. Market leaders such as ChatGPT and Google Gemini saw sharp increases in adoption following the launch of image generation features. ChatGPT introduced GPT-4o image generation in March 2025, while Google Gemini experienced a major download surge after releasing its nano-banana model later in the year.

These feature launches were supported by aggressive App Store Optimization (ASO) and advertising efforts. Publishers prominently highlighted image generation in app descriptions, screenshots, in-app events, and custom product pages tied to relevant search terms, alongside ad creatives showcasing real-world use cases. Google Gemini, in particular, backed its nano-banana launch with a large-scale ad campaign, significantly increasing spend on platforms such as Instagram, TikTok, and Snapchat in September 2025.

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, in-app events, and even custom product pages.

Source: Sensor Tower Mobile App Insights
Note: iOS and Google Play combined. Apps classified using Sensor Tower's taxonomy as of January 2026. App store marketing on iOS in the United States.

Weekly Worldwide Downloads for Select Generative AI Apps with Image Generation

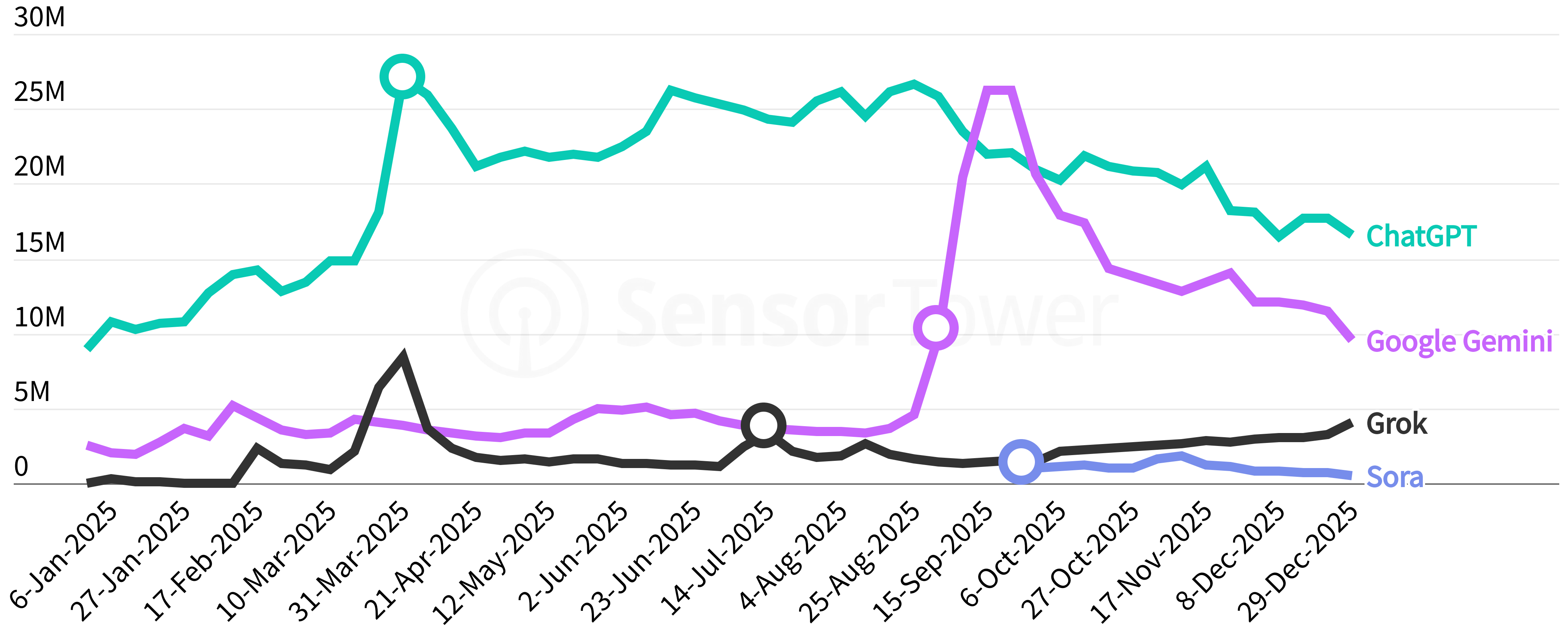


Image Generation Focused Marketing in 2025

ChatGPT	Google Gemini	Grok

Screenshots:
April 7, 2025

Details: Added as first screenshot on app profile page

In-App Events:
April 7, 2025

Event Name: ChatGPT image generation
Description: Create images by downloading the ChatGPT app. Create new images or effortlessly restyle your own.

Advertising:
April 15 - 30, 2025

Example ad campaign on Facebook

Sensor Tower Customers can click the headers to view updates and advertising in the platform.

Click image / video to view it in a new tab

2025 Rankings by Market | AI on Mobile

AMER - Downloads

	Worldwide	United States	Canada	Mexico	Brazil	Argentina
1	ChatGPT	ChatGPT	ChatGPT	ChatGPT	ChatGPT	ChatGPT
2	Google Gemini	Google Gemini	Google Gemini	Seekee	Google Gemini	Seekee
3	DeepSeek	Grok	Grok	Google Gemini	Seekee	Google Gemini
4	Doubao	Microsoft Copilot	Adobe Acrobat Reader	Adobe Acrobat Reader	Perplexity	AI Chatbot - Nova
5	Perplexity	Sora	DeepSeek	AI Chatbot - Nova	Luzia	Luzia
6	Grok	DeepSeek	Microsoft Copilot	Luzia	Adobe Acrobat Reader	Adobe Acrobat Reader

Download data

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

03

Gaming

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

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

Josh Solis
VP, Strategic Insights
Scopely

Mobile Game Revenue Rose 1% Despite Downloads Fall

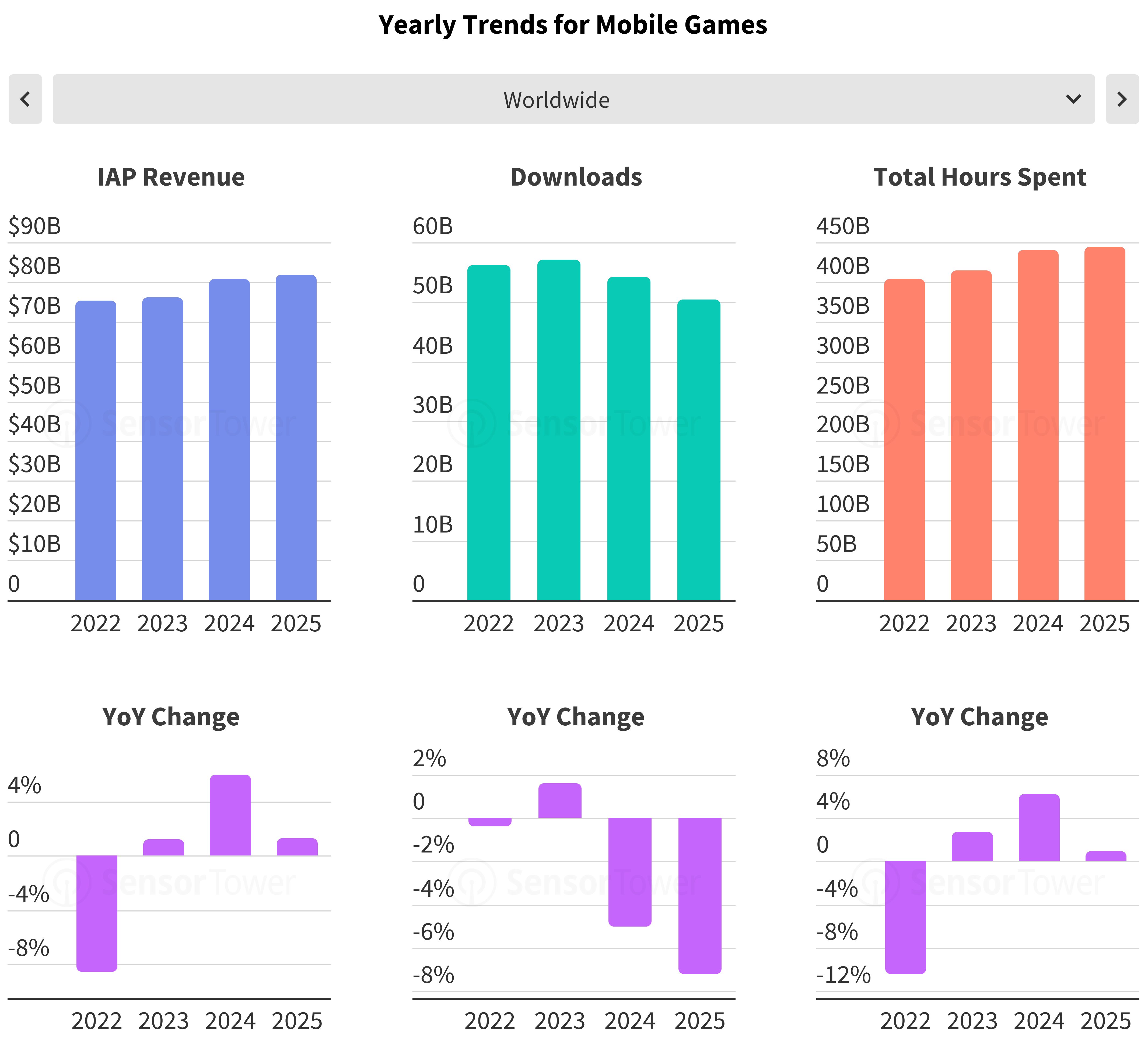
2025 marked a third straight year of revenue growth across the App Store and Google Play. Time spent rose slightly even as downloads fell, pointing to a market shifting from new-user volume to lifetime value expansion.

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

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

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

State Of Gaming Arrives Mid-February 2026
Follow Sensor Tower on LinkedIn to get the report as soon as it drops, plus the key takeaways and supporting charts.



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

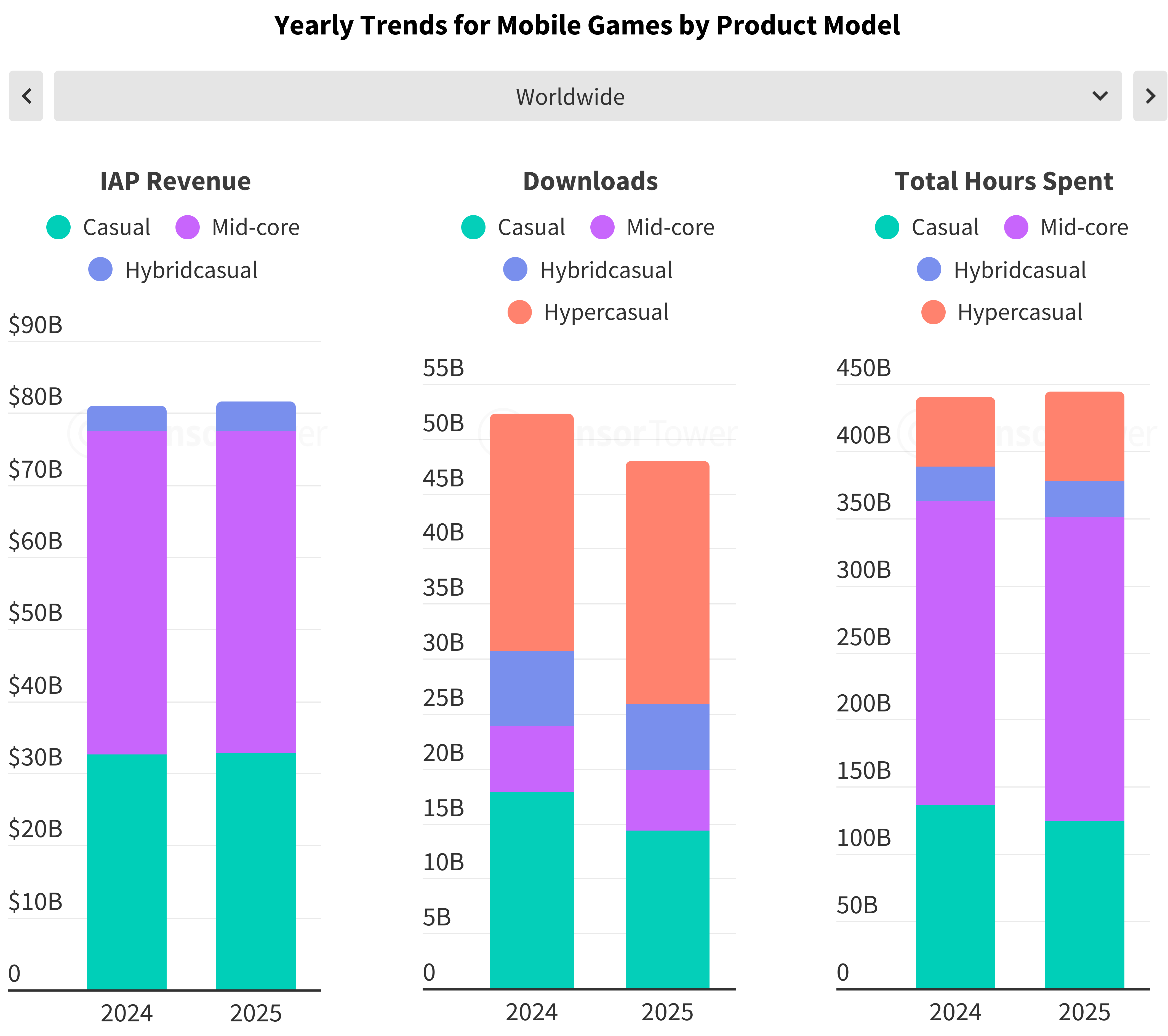
Hybridcasual Grew Revenue While Hypercasual Expanded Engagement

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

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

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

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



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

Gaming

Strategy Won 2025

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

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

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

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

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

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

IAP Revenue | Downloads | Time Spent (Years)

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

Gaming

Ad Mix Concentrates Into Fewer Platforms, Formats

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

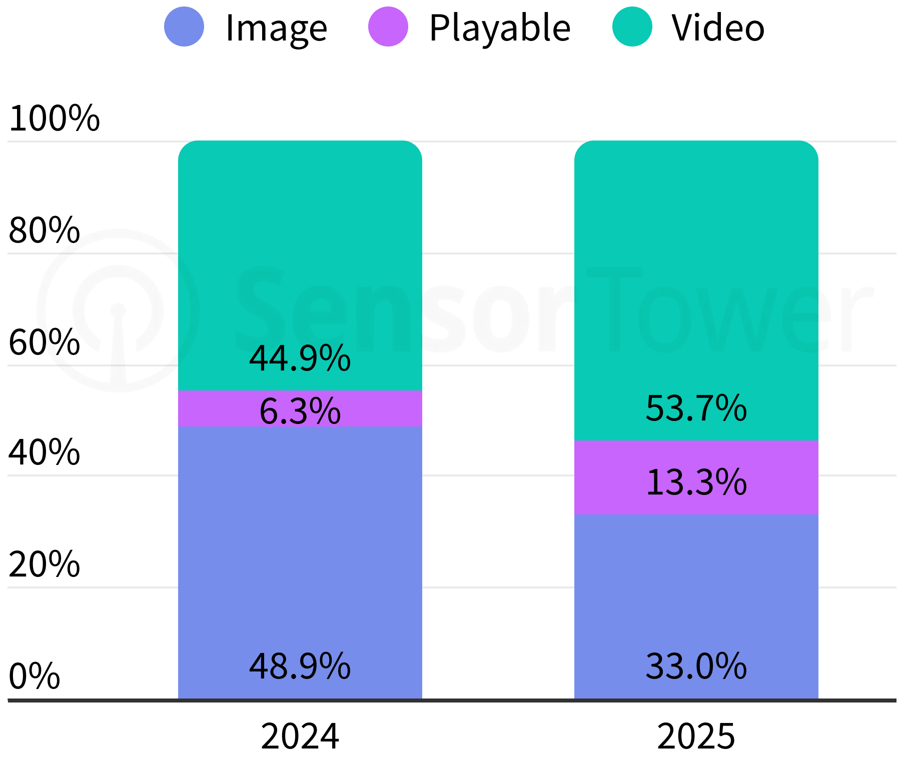
Platform consolidation accelerated toward Meta. Instagram and Facebook gained share while TikTok and YouTube declined. AppLovin and Mintegral grew roughly +30% YoY, taking share from AdMob (~+4%), signaling a shift away from legacy networks.

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

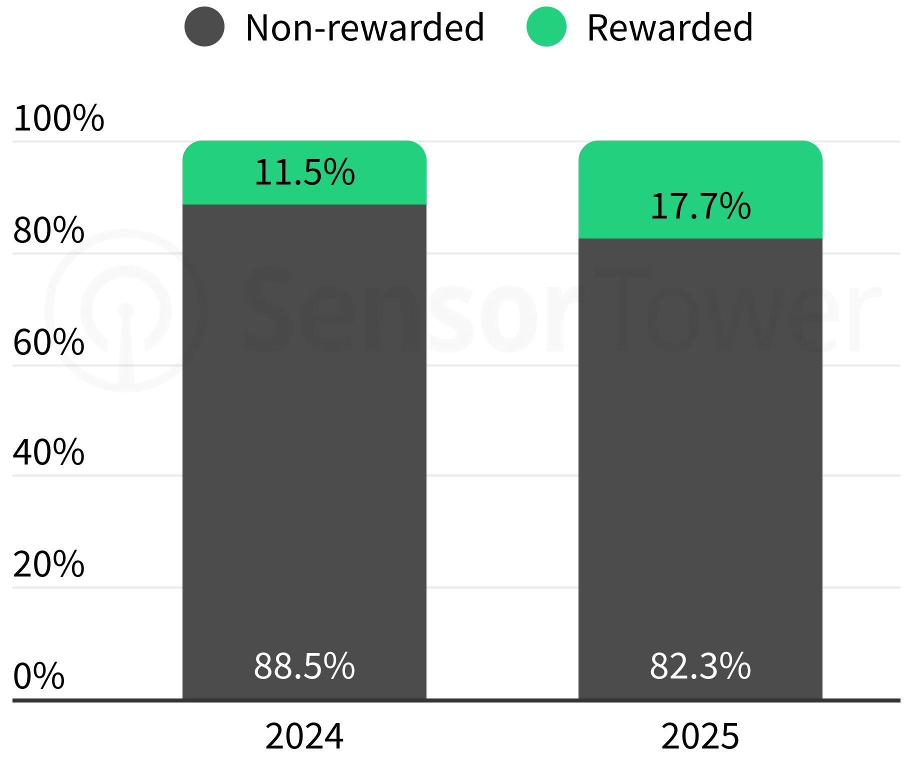
The result: volume is concentrating, creative wears out faster, and “good enough” is less likely to hold.

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

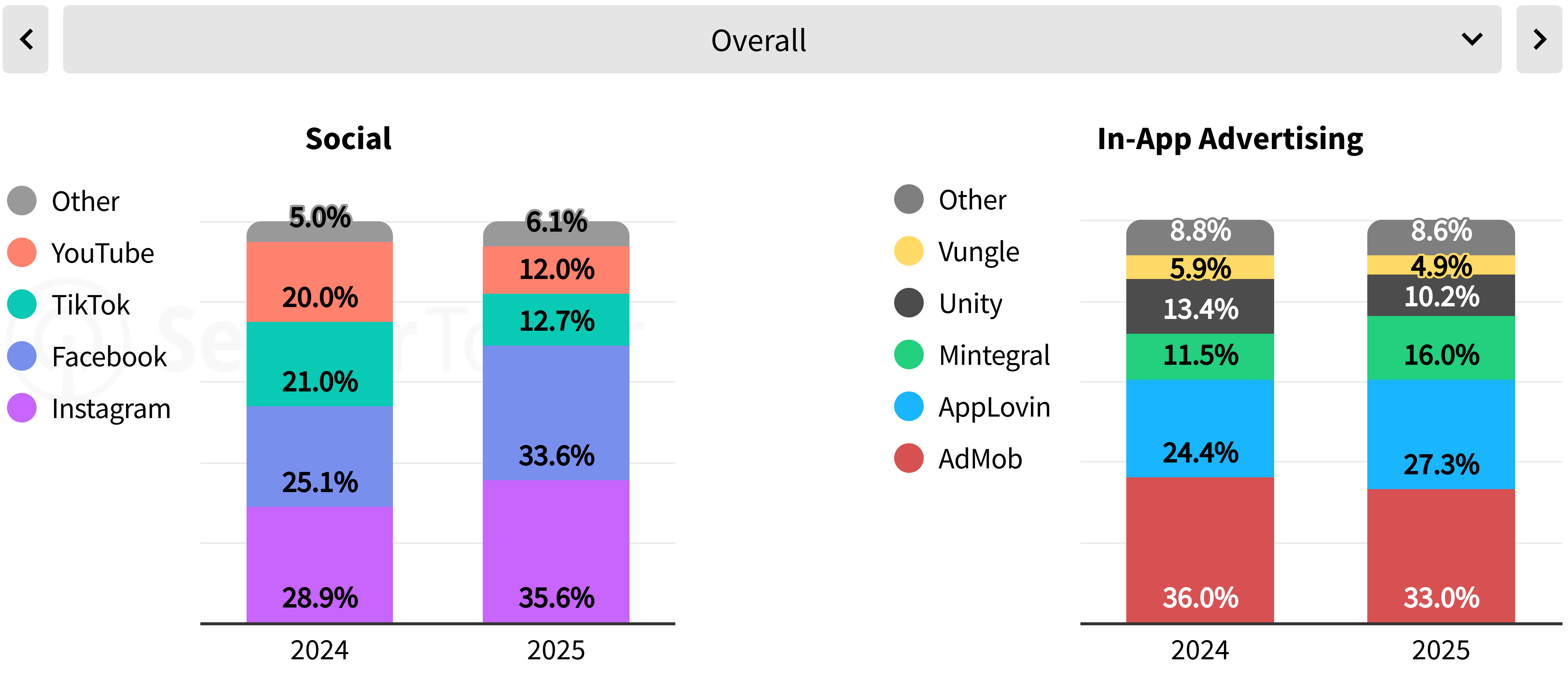
Ad Type Impression Share, Worldwide



Rewarded Ad Impression Share, Worldwide



2025 Ad Network Impression Share by Genre



Source: Sensor Tower Mobile App Insights, Custom Data
Note: Games classified using Sensor Tower's taxonomy as of January 2026.

Ad Spend Crowded into Casual Despite Lower IAP Revenue Share

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

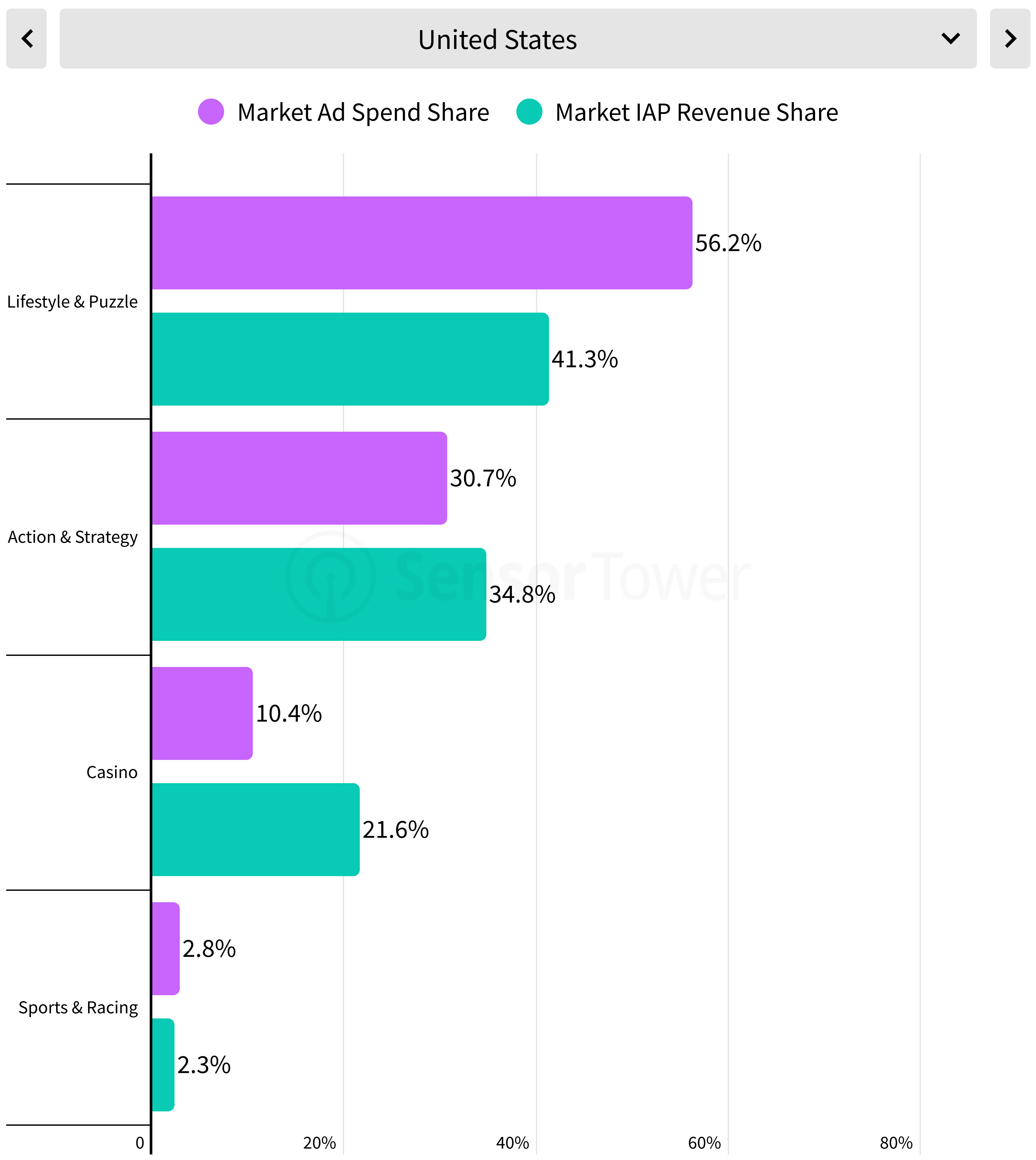
Japan shows a similar mismatch in Lifestyle & Puzzle, but the biggest imbalance flips to Action & Strategy: it generates the majority of IAP revenue while taking a smaller share of ad spend.

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

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

Mobile Game Class Ad Spend Share and IAP Revenue Share

2025



Included Ad Channels

Only select ad channels are available in each market

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

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

Gaming

Casual Has a Retention Problem

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

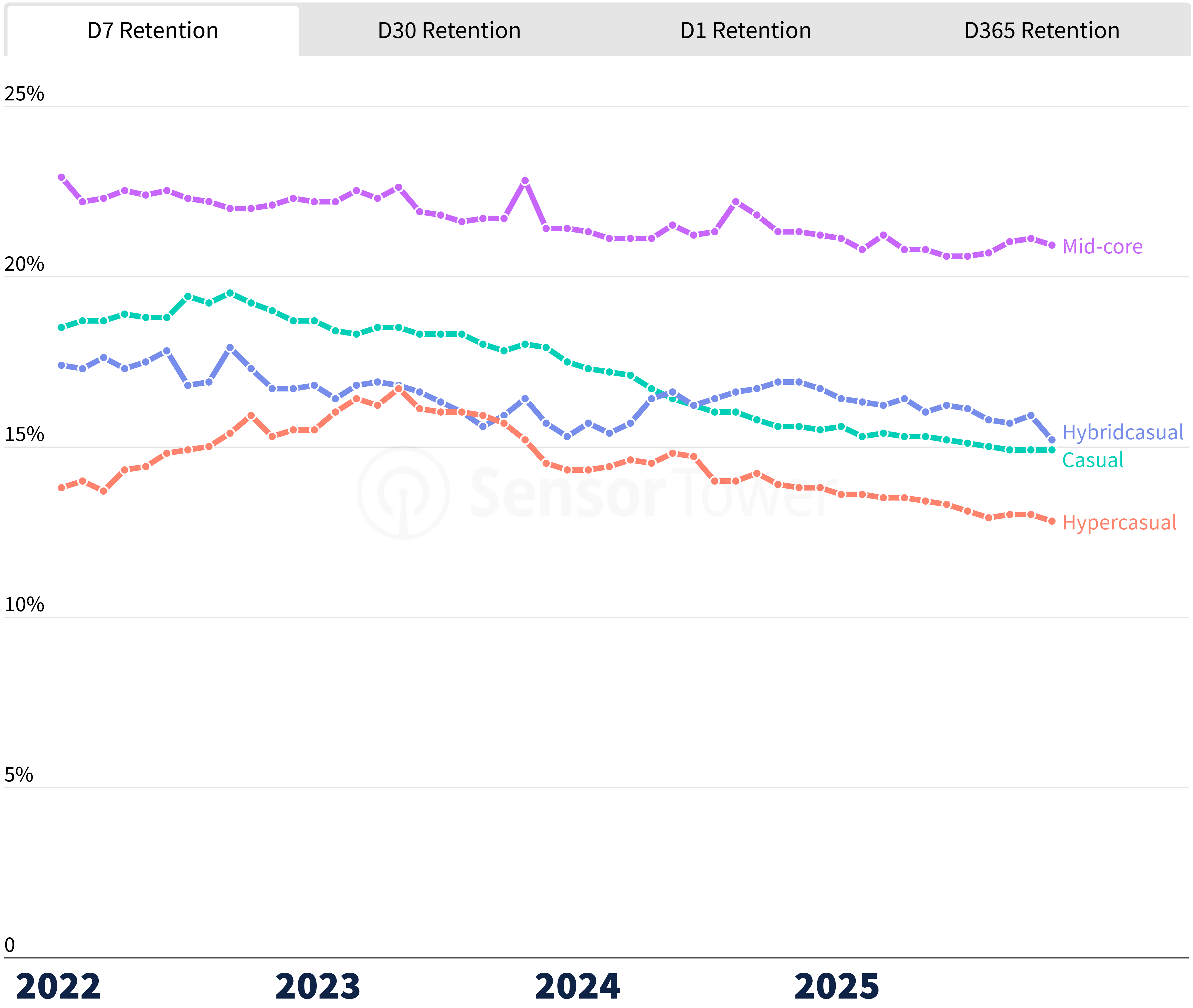
This drop is more concentrated in casual than in other product models, suggesting a model-specific stickiness headwind rather than a uniform market shift. The pattern may reflect content fatigue, audience mix changes, or maturity in long-running casual portfolios.

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

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

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

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



Gaming

Eastern Publishers Gained Share In 2025 As Century Games Broke Out

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

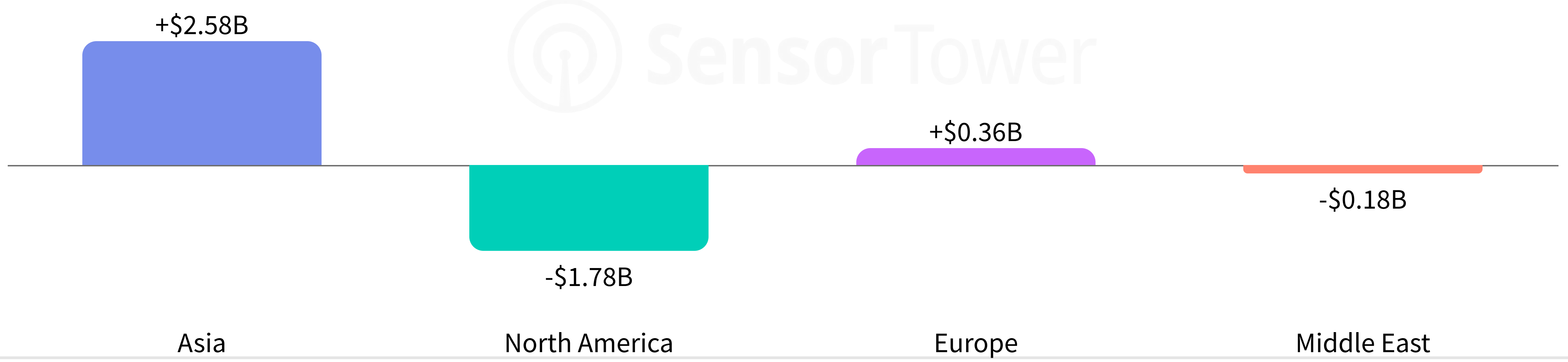
Tencent held the #1 spot in 2025 IAP revenue, even with Supercell and Miniclip broken out separately. Century Games was the standout mover, climbing into the top tier and peaking at #2 late in the year, while FUNFLY also pushed into the top ten on the strength of Last War: Survival, the year's top IAP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

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

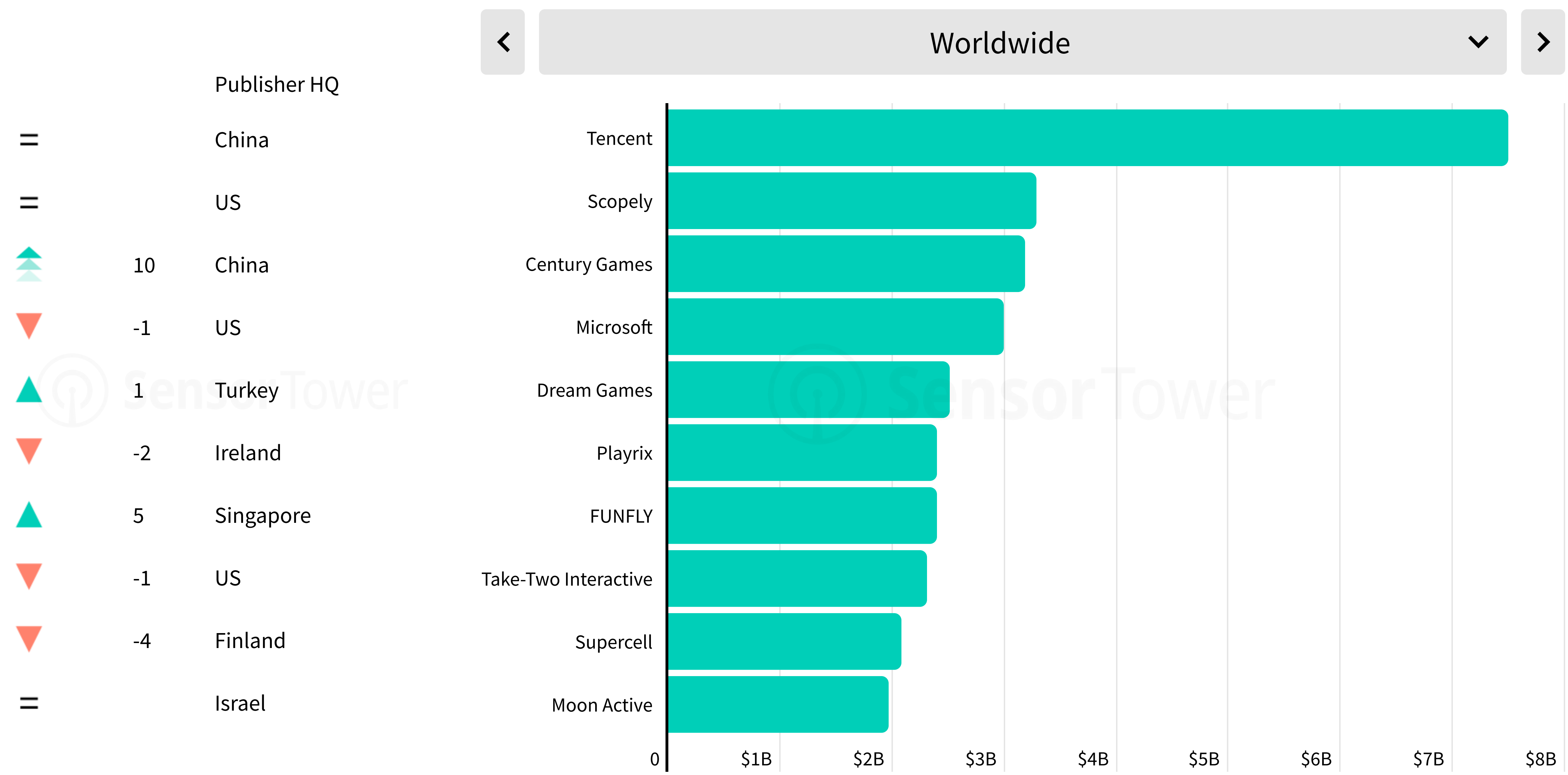
Who Is On Top Now?
Leaderboards shift constantly. Sensor Tower customers can see who is winning today in Mobile App Insights: Top Publishers.

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

In-App Purchase Revenue YoY Change by Publisher HQ Region in 2025



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



Gaming

Live Ops Shifted Towards Progression, Competition

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

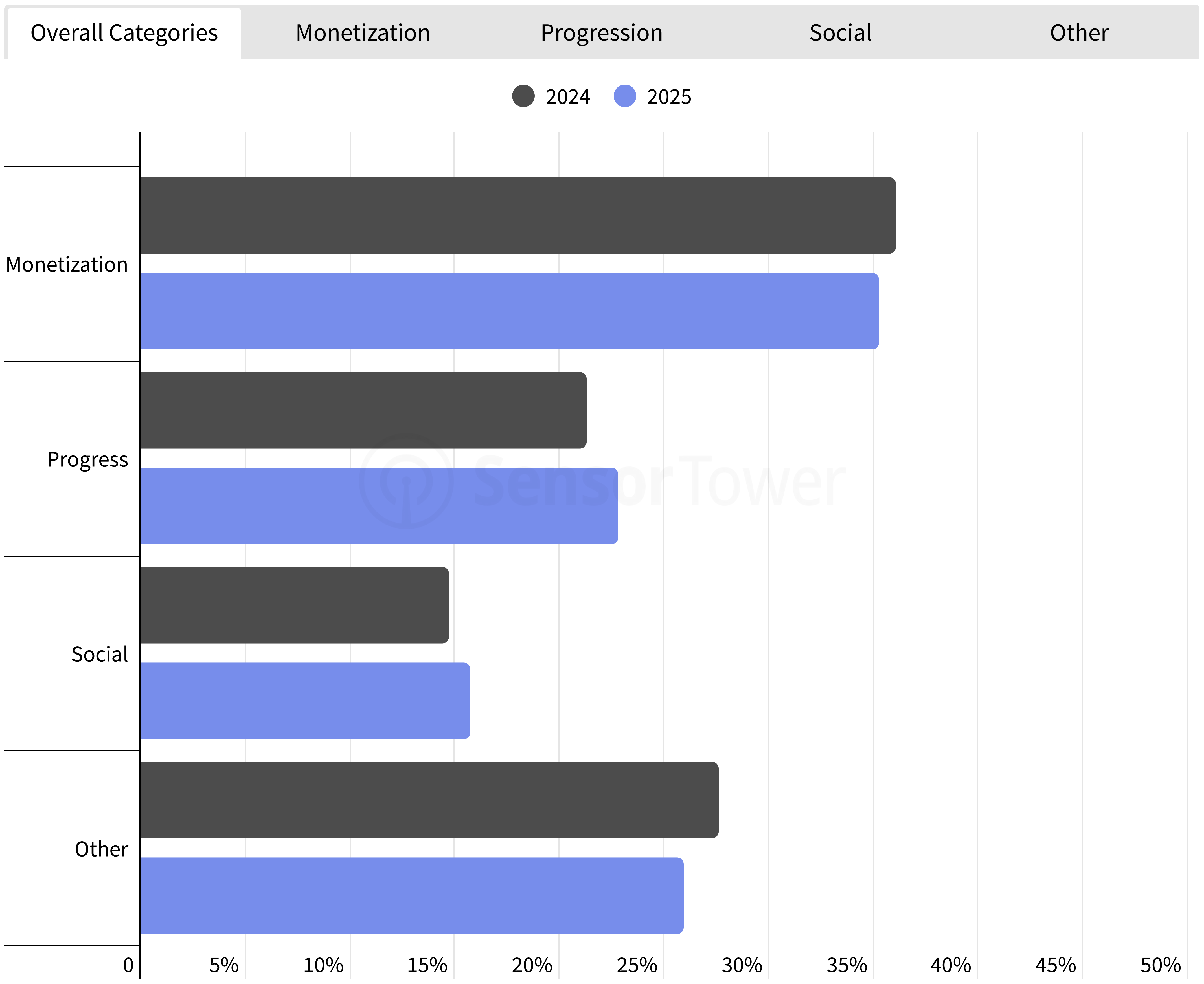
Progression design consolidated around milestone-based structures, while social leaned further into repeatable competitive templates like tournaments, sprints, and club play, creating clearer reasons to return.

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

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

Source: Sensor Tower Live Ops Insights

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



Gaming

Mobile Remains the Main Source of Reach for IPs

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

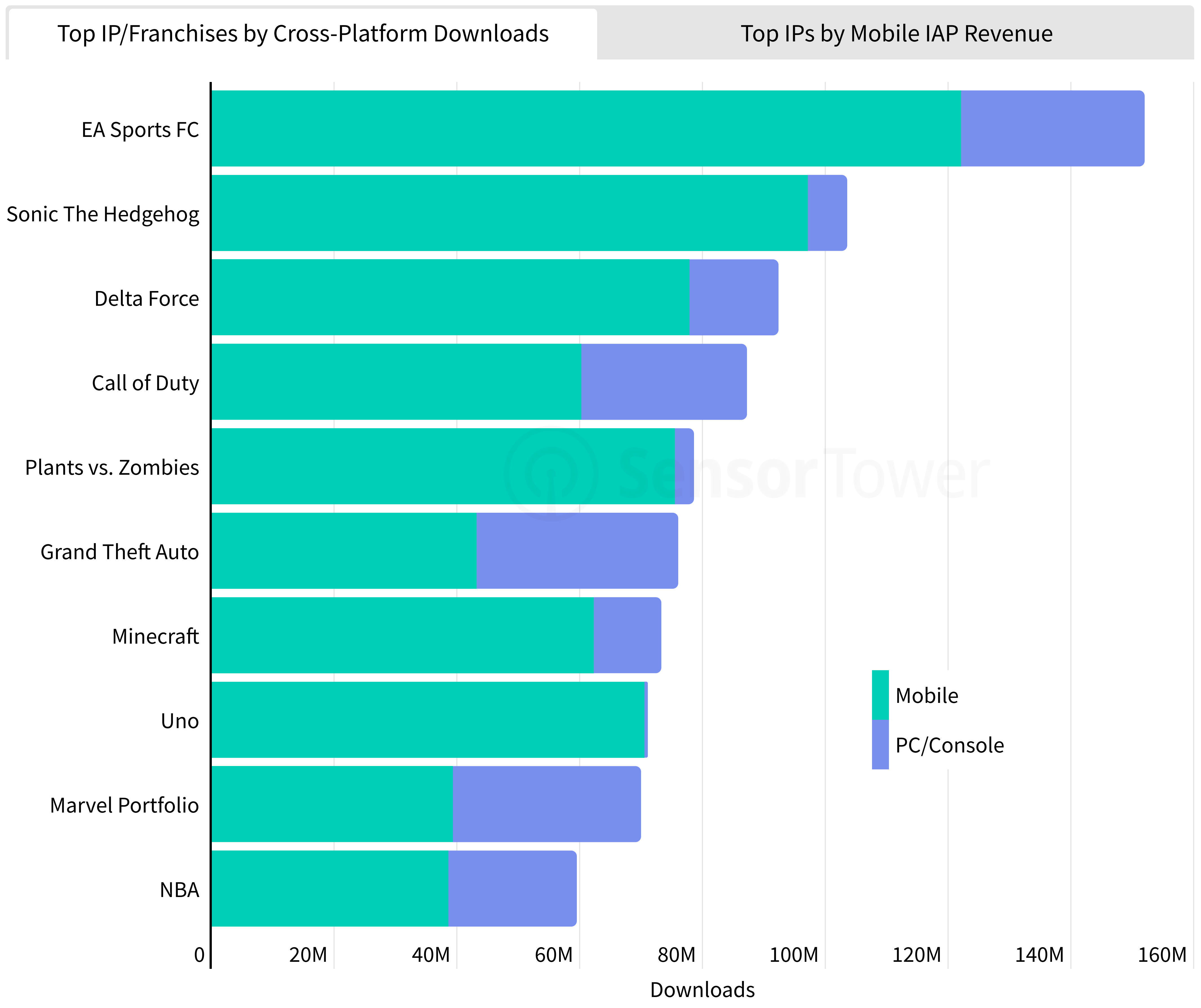
By cross-platform downloads, the top IPs are mostly game-native, with notable exceptions like Marvel and the NBA (and arguably EA Sports FC as a sports IP). That mix suggests room for more non-game IPs to expand reach through mobile-first executions.

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

Unique Cross-Platform Insights.
Combine Mobile App Insights with Video Game Insights to connect reach, engagement, and monetization across platforms in one view.

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

Top Intellectual Properties (IP) in Mobile Gaming Worldwide 2025



Gaming

Roblox Captured 74% of Game Publisher Web Visits in 2025

Roblox captured 74% of all visits to game publisher websites in 2025. Of those Roblox visits, 90% were direct (typed URL or bookmark) and 5% came from organic search.

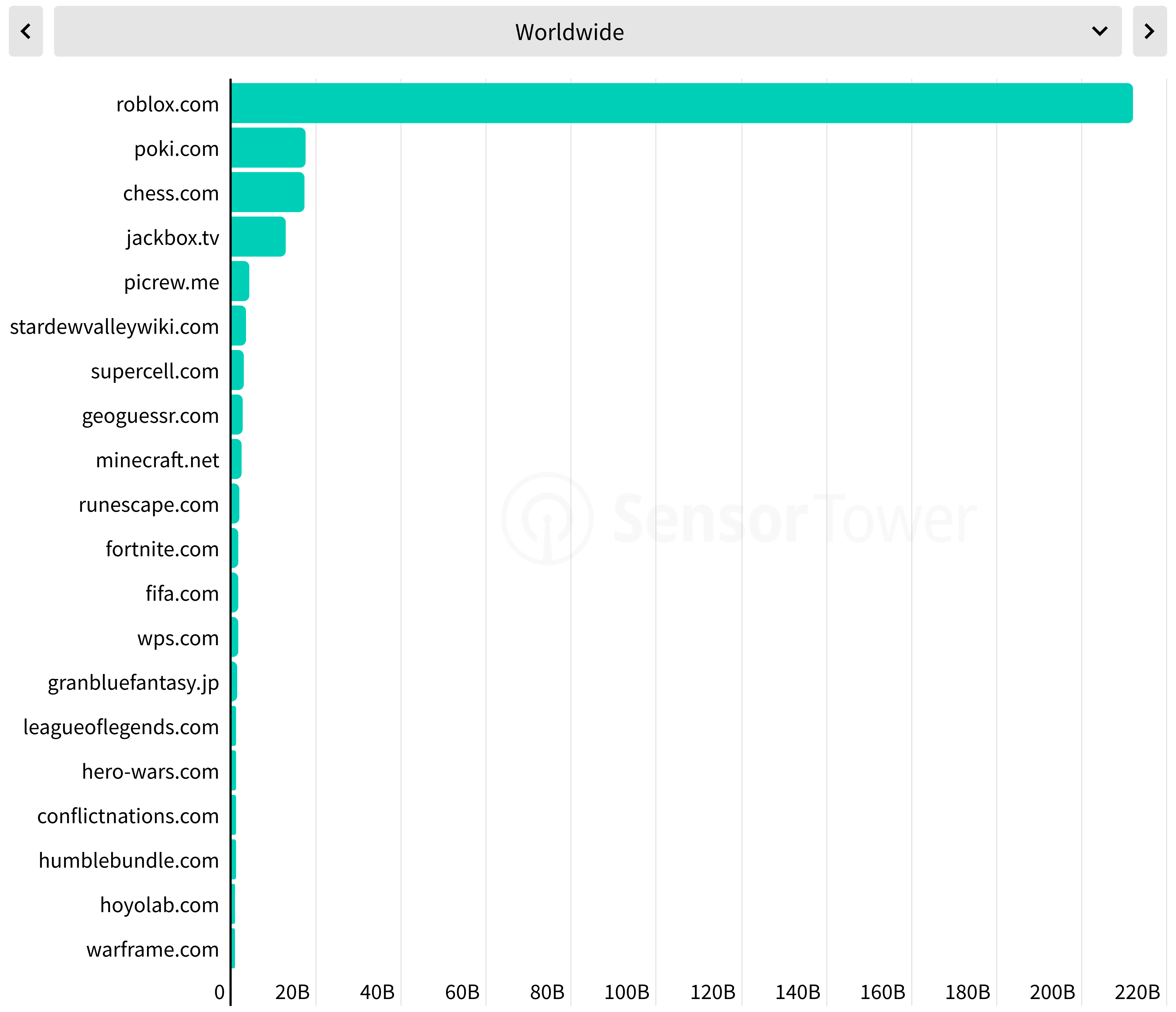
This concentration reflects both Roblox's scale and its web-centric product design, where the website is a primary surface for discovery and play. The top Roblox path is /games/, and /store/ is one step away, which would rank #14 worldwide if it were its own site.

Despite this, Roblox's web store was only #2 by visits in 2025. Supercell's store.supercell.com drew 1.7B visits and would rank #10 worldwide as a standalone site.

Want To Benchmark Your Web Store?
Sensor Tower Web Insights completes the web side of the picture so you can compare store traffic and see which competitor SKUs earn the most clicks.

Source: Sensor Tower Web Insights
Note: Worldwide includes 50+ markets.

Top 20 Game Publisher Websites by 2025 Visits



2025 Rankings by Market | Games

AMER - Downloads

	Worldwide	United States	Canada	Mexico	Brazil	Argentina
1	Block Blast!	Block Blast!	Block Blast!	Roblox	Roblox	Roblox
2	Roblox	Roblox	Roblox	Block Blast!	Garena Free Fire	Block Blast!
3	Garena Free Fire	Royal Kingdom	Vita Mahjong	Garena Free Fire	Block Blast!	Garena Free Fire
4	Subway Surfers	Fortnite	Clash Royale	Subway Surfers	Subway Surfers	Clash Royale
5	Pizza Ready!	Vita Mahjong	Color Block Jam	Pizza Ready!	Pizza Ready!	Subway Surfers
6	Ludo King	Township	Kingshot	2 3 4 Player Mini Games	Stumble Guys	Geometry Dash
7						

Download data

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

04

Finance

Mobile finance is adapting to economic shifts. Rising adoption of lending, budgeting, and buy now, pay later apps shows that users are increasingly turning to mobile solutions for financial management.

"Sensor Tower helps us visualize the synergy between MODO and banking apps. Monitoring the competitive landscape allows us to fine-tune our strategy, ensuring the banking ecosystem remains the dominant force in the payments market."

Iván Arinovich
Growth Team Lead
MODO

Finance

Finance App Trends Reveal a Strong but Evolving Mobile Climate

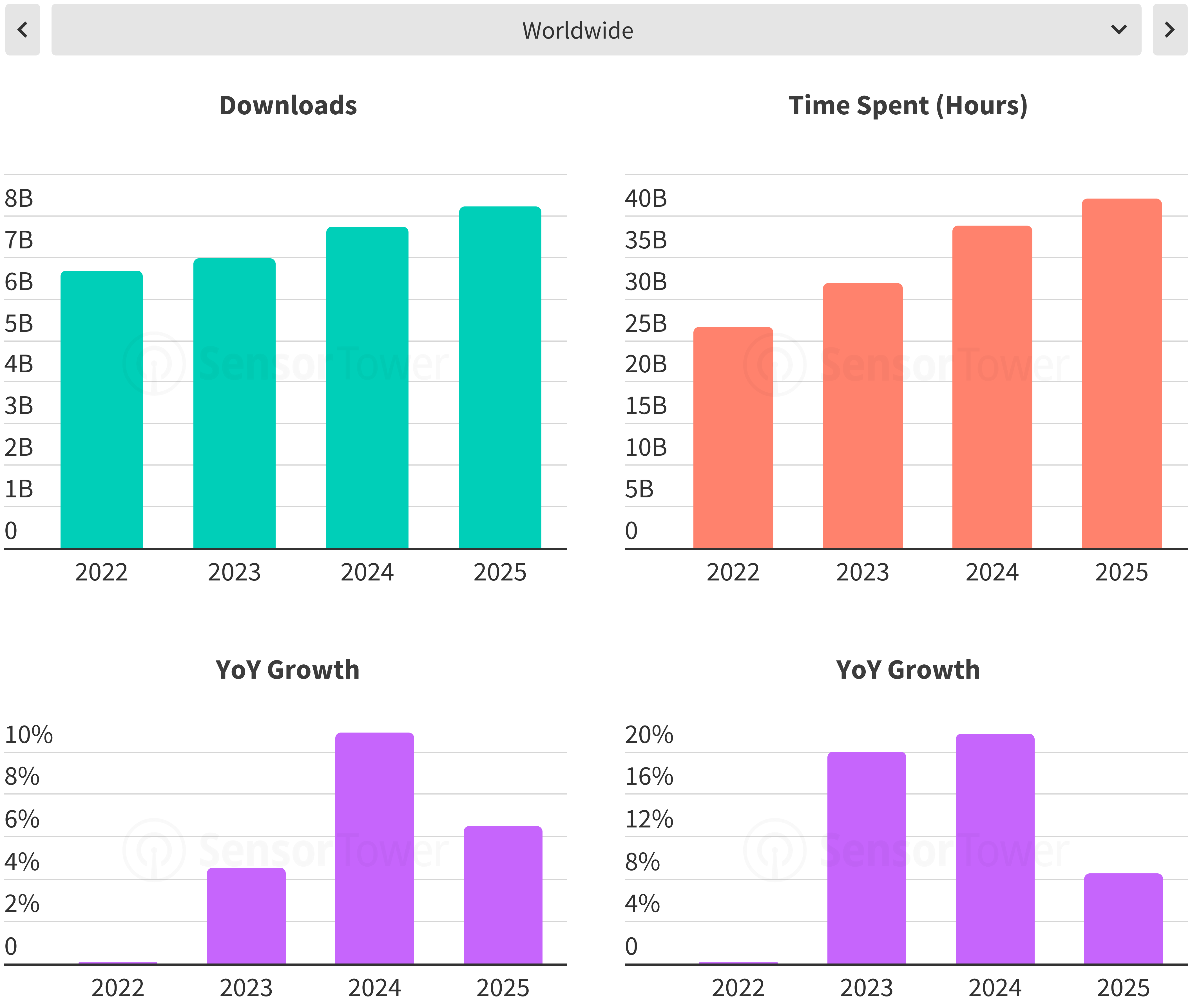
Mobile demand in 2025 highlights shifting consumer preferences across finance apps, from cryptocurrency to credit and lending. Global downloads continued to rise, up 6% YoY to surpass 8 billion for the first time. Core consumer finance categories such as Consumer Banking and Digital Wallet & P2P Payments maintained modest growth, while Credit & Lending apps saw downloads climb 18% YoY. This growth helped offset a 15% decline in Investing & Financial Management apps, including a nearly 30% drop in Cryptocurrency apps.

Growth in time spent within Finance apps moderated to 8.5% YoY in 2025 after rapid growth in 2023 and 2024. However, trends varied by subgenre. Digital Wallet & P2P Payments, Lending, and Buy Now, Pay Later each saw double-digit increases, while Cryptocurrency apps experienced YoY declines.

How is AI Impacting Finance Apps?
Check out our blog post on how AI Assistants became a popular tool for United States tax filers in 2025.

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

Yearly Trends for Finance Apps



Demand for Mobile Finance Solutions Remains High

Finance app downloads trended upward across leading subgenres in 2025, led by Consumer Banking, Digital Wallets & P2P Payments, and Lending. Eight of the top 10 apps by global downloads in 2025 were Digital Wallets & P2P Payment apps. At the market level, rankings showed greater variation, with Consumer Banking and Buy Now, Pay Later apps frequently appearing among the top five.

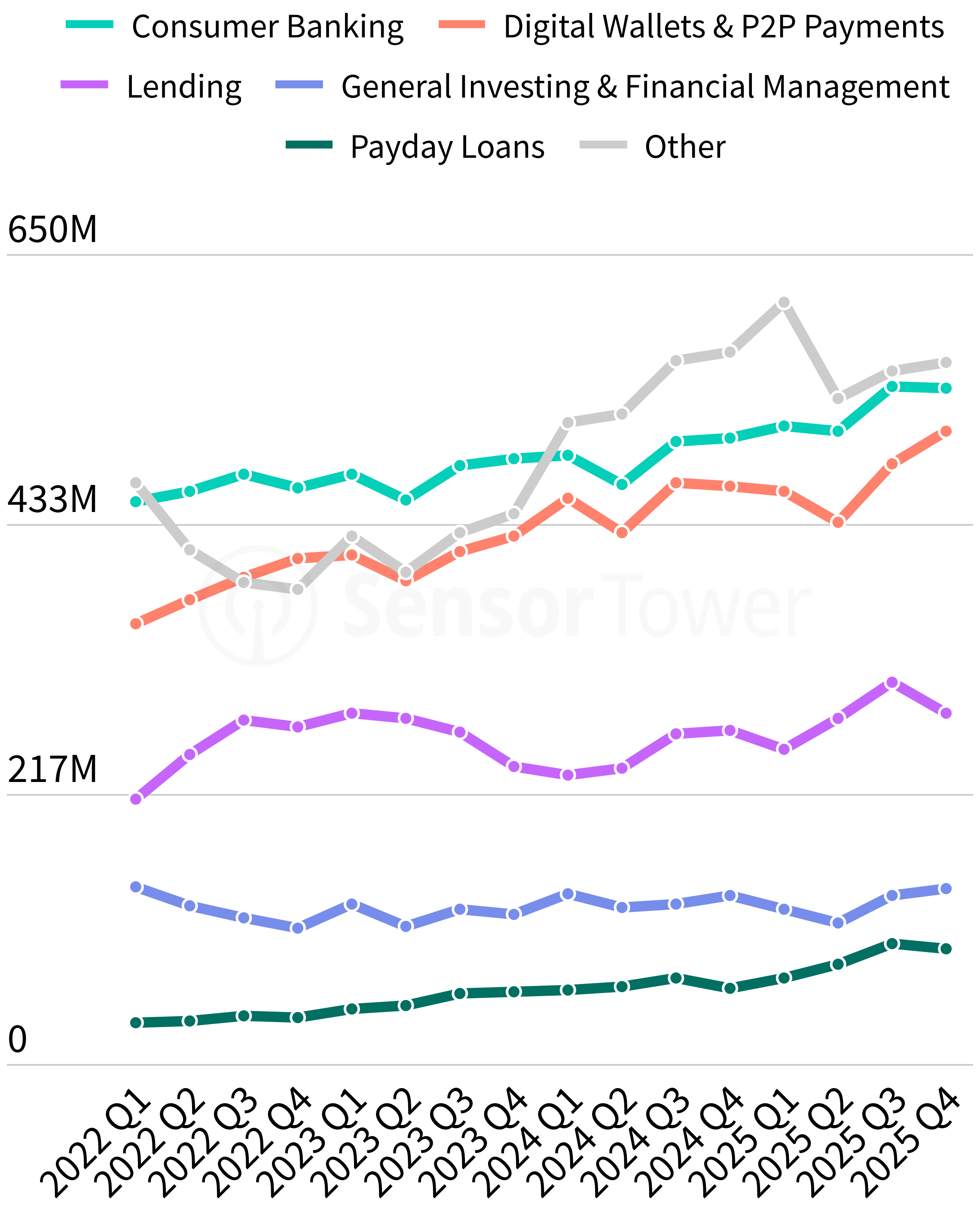
Top-performing subgenres vary significantly by market, reflecting differences in consumer needs and country-specific regulations. Buy Now, Pay Later apps were particularly popular across several European markets, including the United Kingdom and Italy, where it ranked as the third-largest subgenre by downloads in Q4 2025. Meanwhile, Cryptocurrency apps ranked among the top three subgenres in markets such as Argentina and Turkey.

Find the Latest Crypto App Trends
Read our report offering a comprehensive view of global Investment apps and brands in 2025.

Finance Download Trends by Subgenre

Worldwide

Quarterly Downloads by Subgenre



Top Apps by Downloads in 2025

	App	Subgenre
1	PhonePe	Digital Wallets & P2P Payments
2	PayPal	Digital Wallets & P2P Payments
3	Navi	Other Financial Services
4	Paytm	Digital Wallets & P2P Payments
5	Google Pay	Digital Wallets & P2P Payments
6	Google Wallet	Digital Wallets & P2P Payments
7	Binance	Cryptocurrency
8	ShopeePay	Digital Wallets & P2P Payments
9	UnionPay APP	Digital Wallets & P2P Payments
10	DANA	Digital Wallets & P2P Payments

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

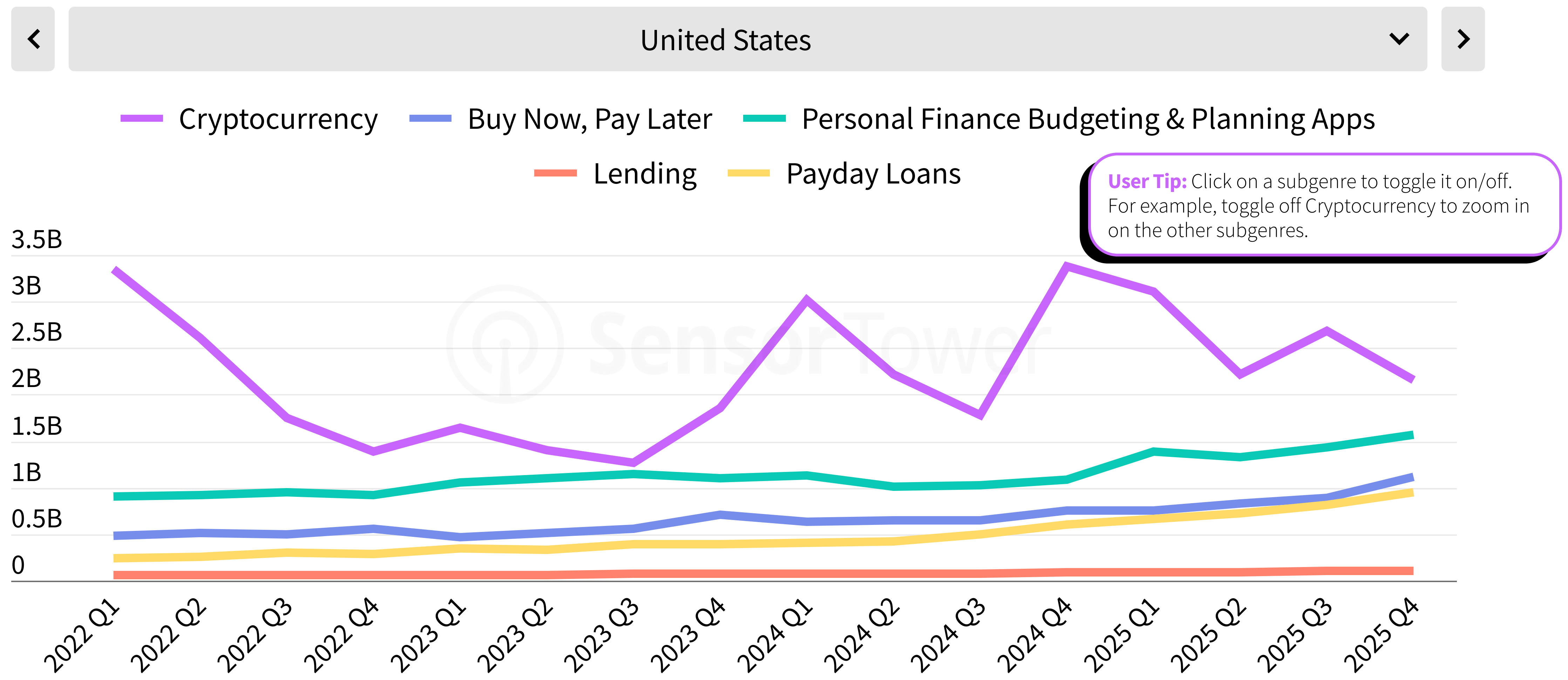
Increased Loan App Adoption Reflects Dipping Consumer Sentiment

Shifts in finance app demand often mirror changes in economic conditions and consumer sentiment. In the US, for example, Cryptocurrency app demand has historically risen alongside improvements in consumer sentiment.

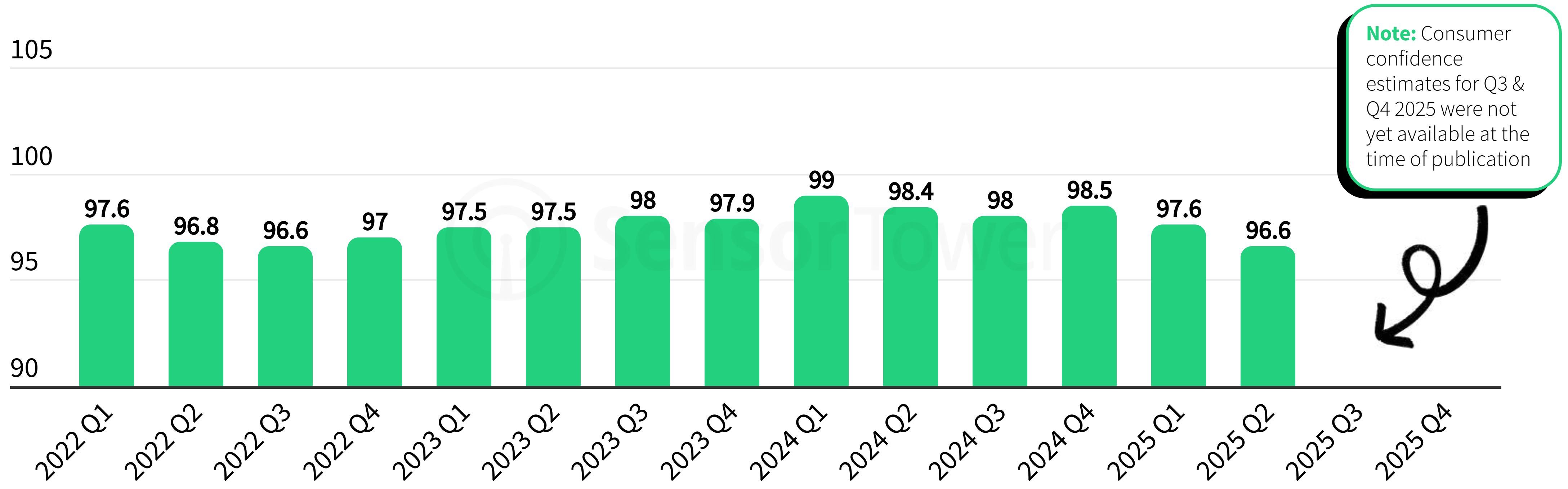
A modest dip in consumer sentiment in H1 2025 coincided with increased demand for Buy Now, Pay Later, Personal Finance Budgeting & Planning, and Payday Loan apps in the US. While consumer sentiment data for H2 2025 was not available at the time of publication, continued growth in demand for these app categories suggests sentiment has yet to meaningfully improve.

How are Crypto Apps Responding to Headwinds?
Learn more about how top crypto apps in the US and the UK are increasing their ad spend — and how their strategies differ.

Quarterly Total Sessions for Select Finance Subgenres



Consumer Confidence in Market (Index, Normalized)



Source: Sensor Tower Mobile App Insights, OECD 2025, Household indicators dashboard – country view (accessed on December 23, 2025)
Note: iOS and Google Play combined. iOS only for China. Apps classified using Sensor Tower's taxonomy as of January 2026. Consumer confidence data from the OECD was available through Q2 2025.

Finance

Crypto and Sports Betting Audience Similarities Provide Partnership Opportunities

The rise of sports betting and prediction markets in the US creates partnership opportunities for cryptocurrency apps, given the strong audience overlap. Both categories skew heavily toward young males, although Sports Betting is slightly more popular among the 25–34 age group. Sports Betting users are also 5.4x more likely to fall into the Crypto Traders persona compared with the typical app user in the US.

Several partnerships have enabled finance apps to enter the prediction market space. Examples include Robinhood partnering with Kalshi and Crypto.com teaming up with Underdog. These collaborations are a natural fit: nearly 30% of Kalshi monthly active users also used Robinhood in the same month in 2025, while Underdog Sports users were nearly 8x more likely than the average app user to engage with Crypto.com.

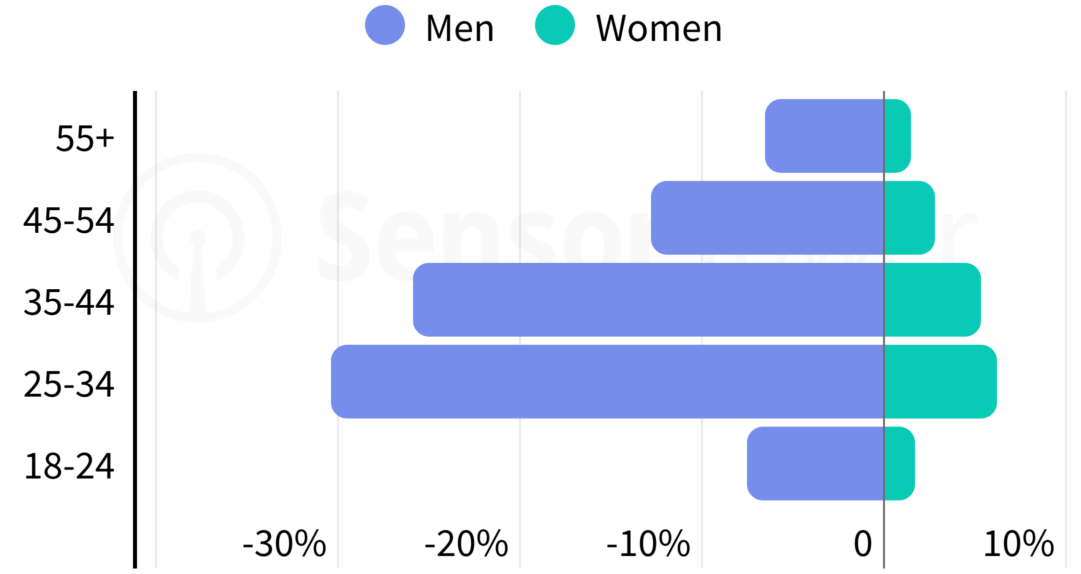
Know your Audiences Better
Sensor Tower's Audience Insights allows you to discover the demographics of your existing app users, personas that make up your user base, and the advertisers targeting them on social media.

Source: Sensor Tower Audience Insights
Note: iOS and Google Play combined. iOS only for China. Apps classified using Sensor Tower's taxonomy as of December 2026. Audiences include the top 25 apps by average MAU in the US in 2025 for each subgenre. Top apps by increased chance of use include any apps with at least 1% usage penetration in the United States.

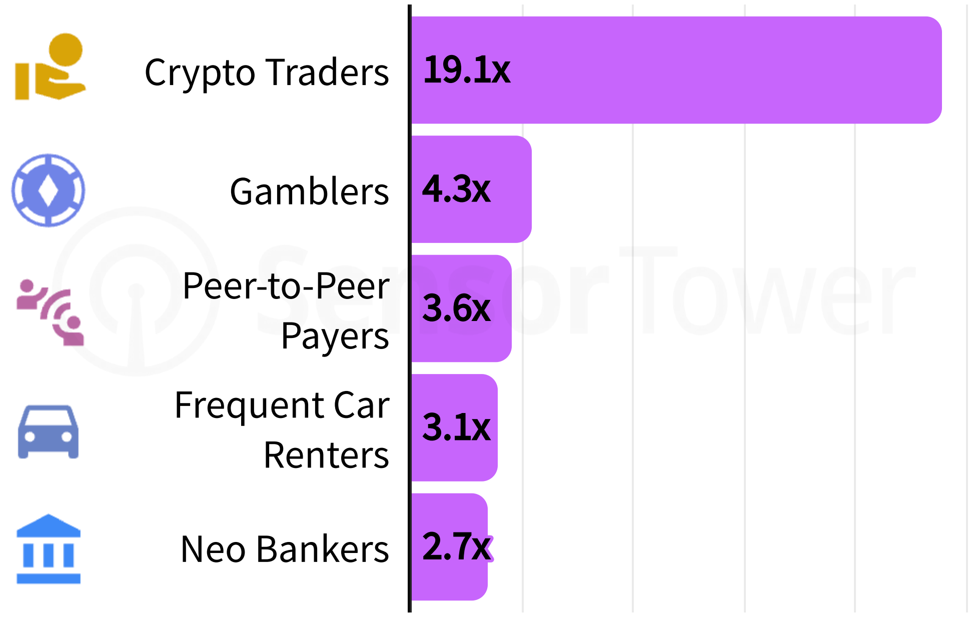
Cryptocurrency | Sports Betting

Audience Insights: Cryptocurrency vs. Sports Betting App Users, United States

Demographics

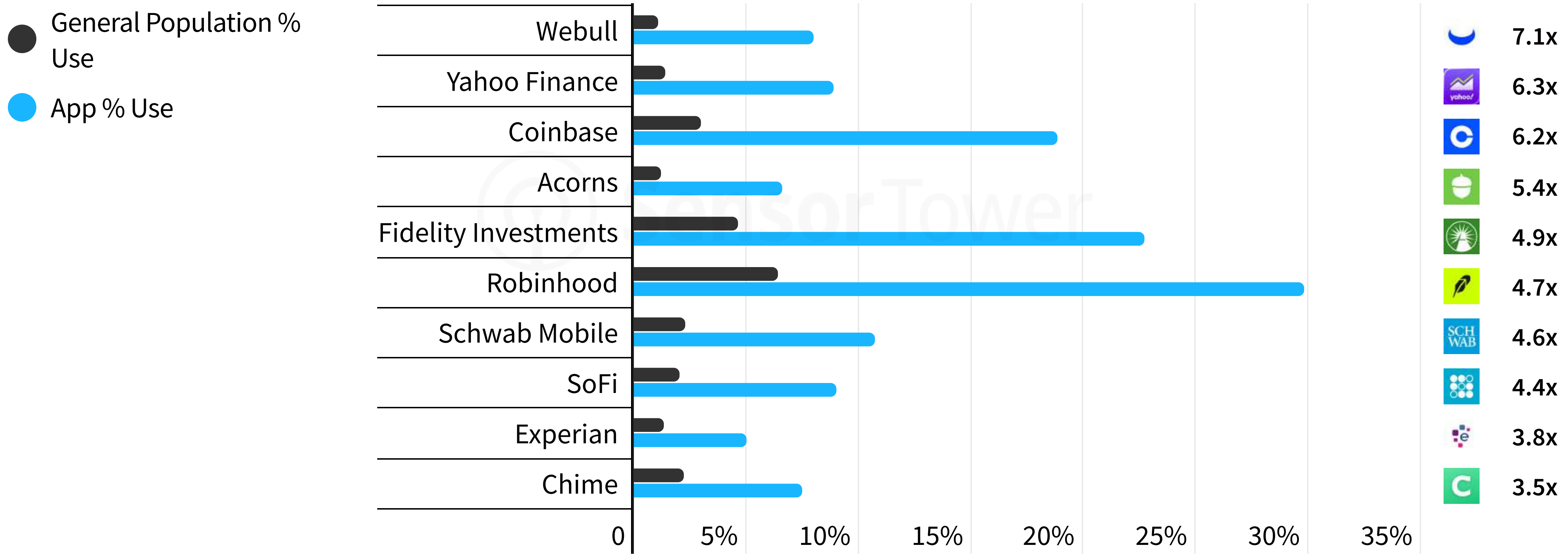


Top Personas



Top Apps by Increased Chance of Use for Select Sports Betting / Prediction Apps

Kalshi



2025 Rankings by Market | Finance

AMER - Downloads

	Worldwide	United States	Canada	Mexico	Brazil	Argentina
1	PhonePe	Cash App	PayPal	Banco del Bienestar Móvil	Nubank	Mercado Pago
2	PayPal	PayPal	Wealthsimple	Mercado Pago	Mercado Pago	Naranja X
3	Navi	Venmo	Klarna	BBVA	PicPay	BNA+
4	Paytm	Intuit Credit Karma	RBC Mobile	Kueski	Banco Itaú	Galicia
5	Google Pay	Capital One Mobile	CIBC Mobile Banking	Nubank	CAIXA	Santander
6	Google Wallet	Chime	TD Bank	DiDi Finanzas	Inter	Claro Pay Colombia
7						

Download data

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

05

Retail

Tariffs and market saturation challenged mobile retail in 2025, yet innovation kept growth opportunities alive. AI-driven referrals, interactive live shopping, and strategic ad investments enabled leaders to engage shoppers.

"Sensor Tower is a key reference for market intelligence and competitive analysis across our Fintech and Marketplace verticals. The platform enables us to benchmark competitors, understand advertising investment levels and channels, and conduct deep mobile performance analysis. These insights play a critical role in guiding data-driven decisions across our global Marketing, Business, Planning, Strategy, and Market Intelligence teams."

Leandro Claro
Consumer & Competitive Insights | Regional
Mercado Libre

Retail

Tariffs and AI Reshape Mobile Retail

Global downloads for retail apps declined in 2025, partly due to slowing expansion from major global players like Temu and SHEIN. Saturation in top markets, coupled with US tariffs limiting growth for Chinese-based retailers, prompted these apps to target smaller markets such as Argentina, Thailand, and Saudi Arabia.

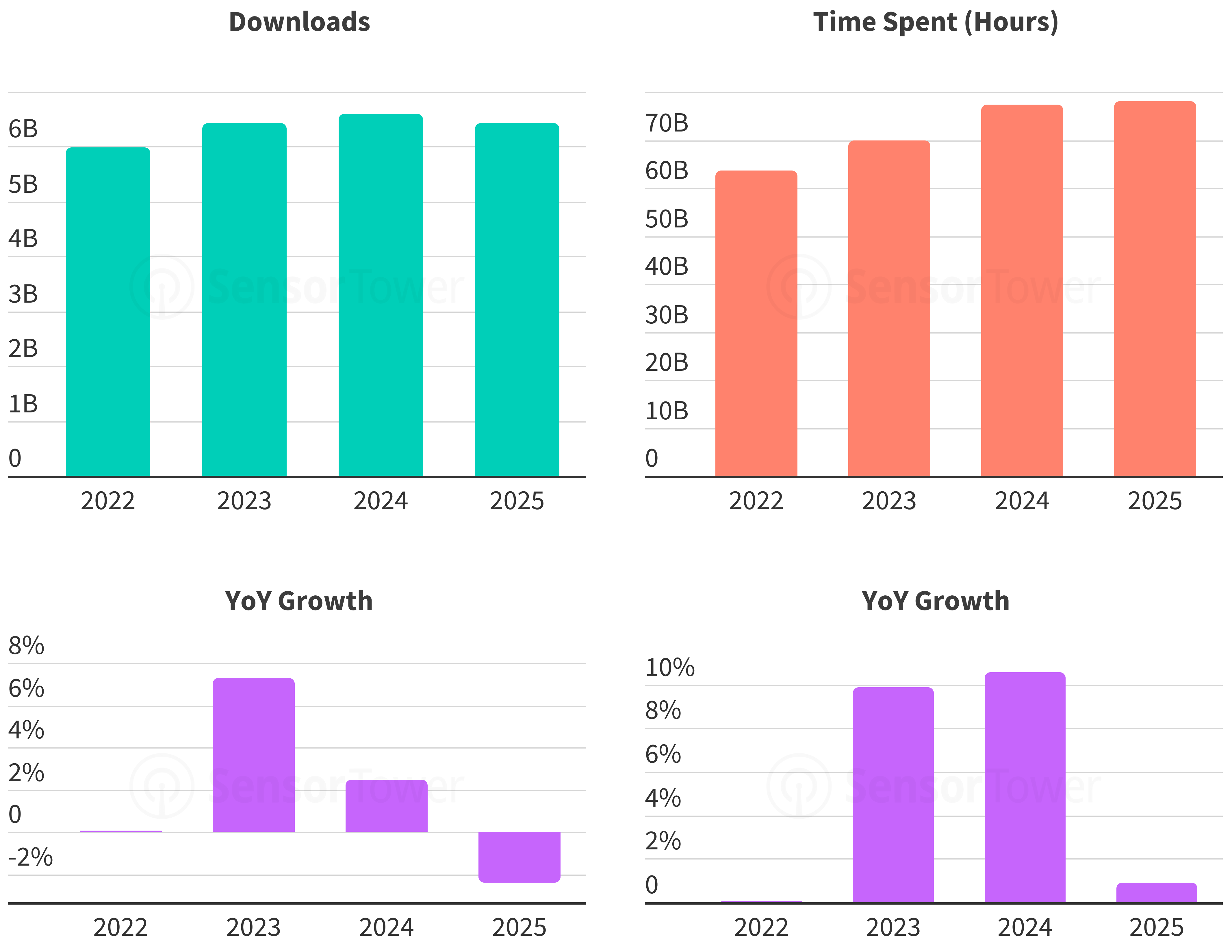
Time spent in retail apps saw modest growth of 1% YoY in 2025, a significant deceleration from the consecutive 10% YoY growth seen in the previous two years. The market appears to be stabilizing after a period of intense competition for user attention and purchases. Top retailers are also exploring the impact of AI on shopping, from optimizing product recommendations via AI assistants to launching their own AI shopping tools, such as Amazon's Rufus and Walmart's Sparky.

Agentic Shopping is Here
Read our post analyzing how Rufus impacted Amazon's sales during Black Friday.

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

Yearly Trends for Retail Apps

Worldwide



Retail

General Shopping Giants Dominate the Mobile Space

General Shopping apps, including Temu, Amazon, and Meesho, continued to command a large share of the mobile retail market. Download peaks varied across markets, with the US, UK, and Mexico spiking in 2023 amid competition from retailers like Temu and SHEIN, while Brazil and Turkey saw peaks later, in late 2024.

While Temu dominated downloads in 2025, Amazon remained the global leader in usage, averaging 685 million MAUs in Q4 2025. Despite this lead, Temu is rapidly narrowing the gap; it surpassed 530 million MAUs following a massive 48% YoY surge in active users.

Most other subgenres experienced slight download declines in 2025. Exceptions included Grocery Stores, which grew 5% YoY, and Buy and Sell apps, which also rose 4%, potentially reflecting more cost conscious consumers.

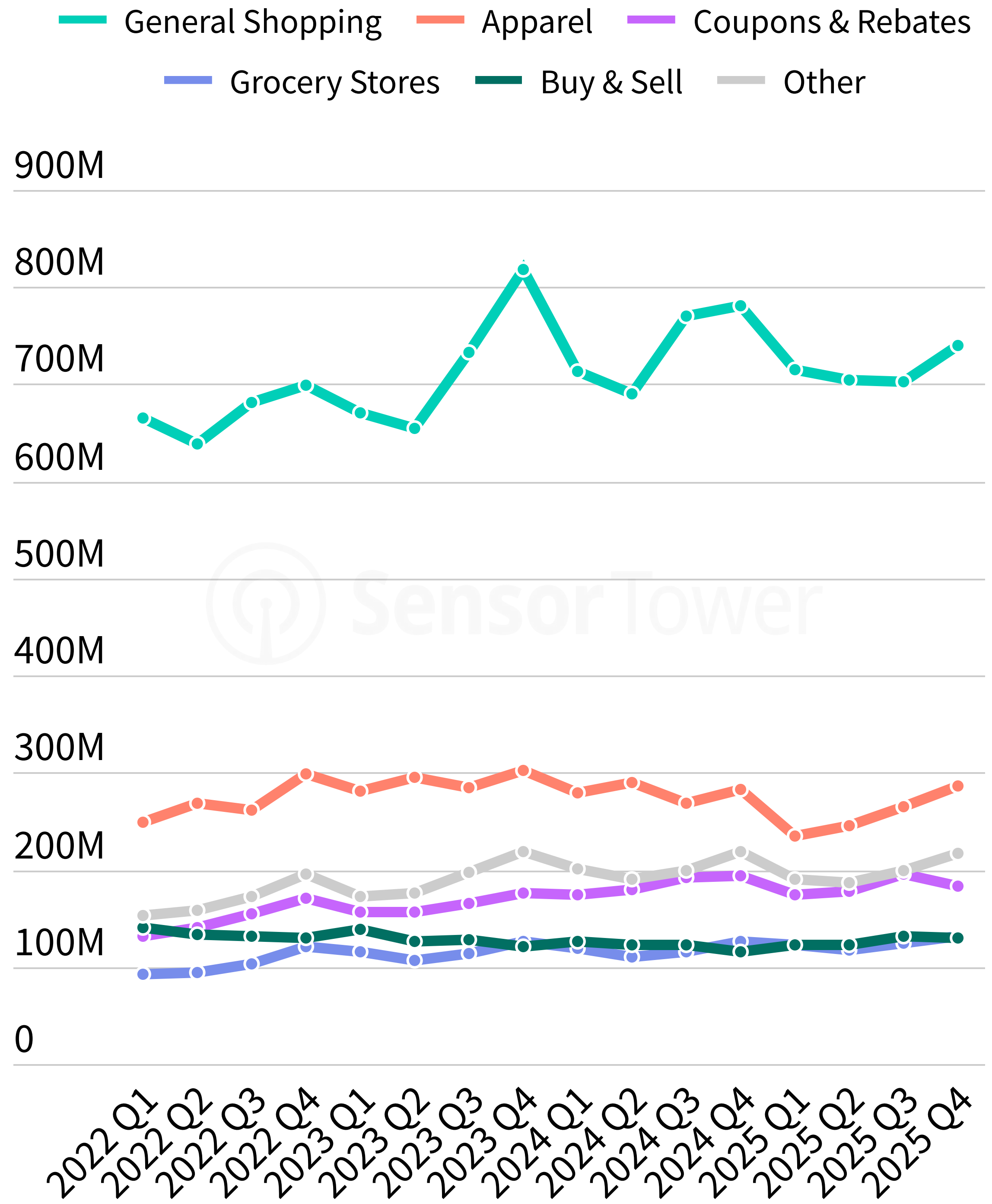
Understand the Holiday Shopping Season
Pathmatics, Sensor Tower's award winning marketing intelligence platform, lets you see how retailers prepared for the biggest shopping holidays and helps you uncover what strategies to try in 2026.

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

Retail Download Trends by Subgenre

Worldwide

Quarterly Downloads by Subgenre



Top Apps by Downloads in 2025

	App	Subgenre
1	Temu	General Shopping
2	SHEIN	Apparel
3	Amazon Shopping	General Shopping
4	Meesho	General Shopping
5	Shopee	General Shopping
6	Alibaba.com	General Shopping
7	Flipkart	General Shopping
8	AliExpress	General Shopping
9	Mercado Libre	General Shopping
10	Myntra	Apparel

Retail

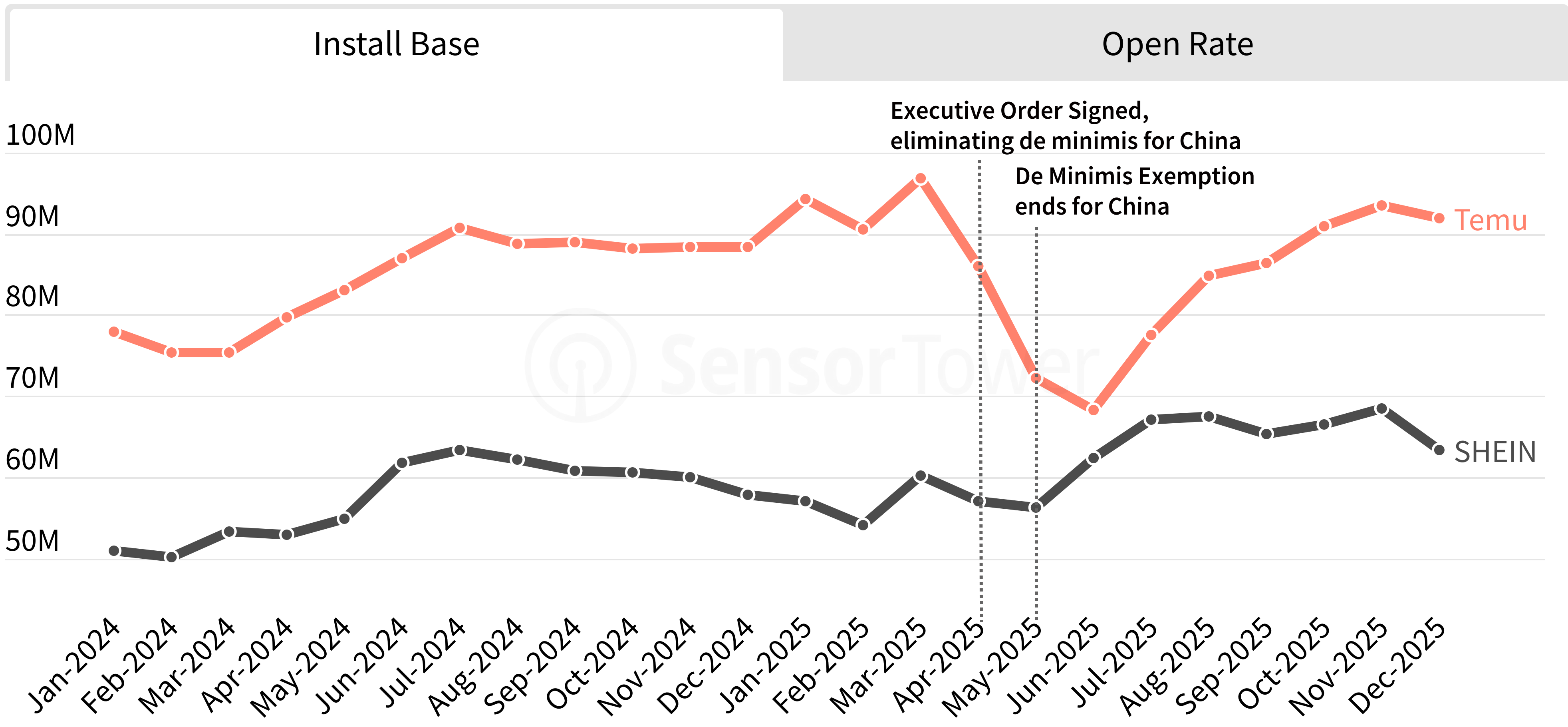
Temu’s Traffic Recovery Post Tariff Impact

The elimination of the de minimis exemption in Q2 2025 triggered a sharp divergence in user engagement. As Temu slashed ad impressions by 97%, its open rate plummeted from 82% to 64%, highlighting a precarious reliance on paid acquisition. Conversely, SHEIN's open rate remained above 80% despite a 30% reduction in ad impressions, signaling a more resilient, brand-loyal audience capable of weathering the tariff shock organically.

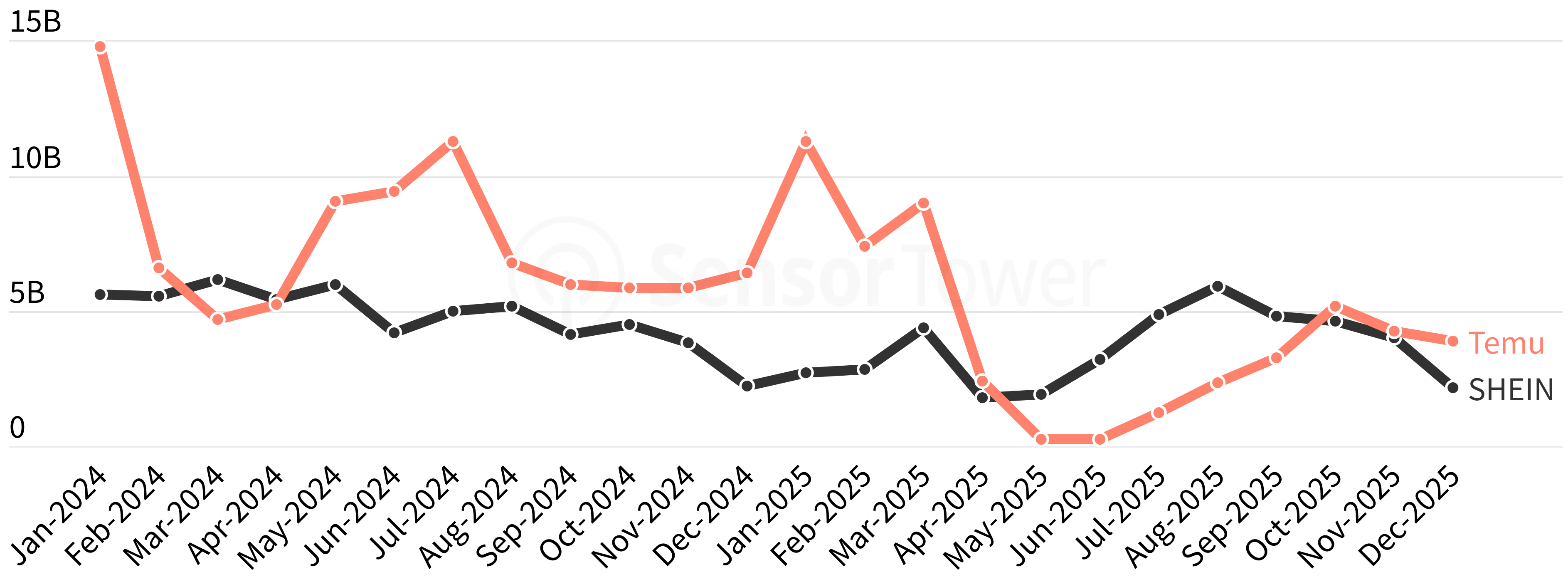
Despite tariffs, Temu's direct-from-factory model provided a sufficient price cushion to remain the low-cost leader, successfully solidifying its existing user base to drive a resilient V-shaped recovery. Temu’s US install base climbed back from a low of 68 million in June to reach its pre-tariff scale of 91 million by October 2025.

Want to Dig Deeper into the Impact of Tariffs?
Check out our Digital Digest diving deep on SHEIN and Temu, including looks at churned vs. resurrected users and a shift in attention to European markets.

Temu and SHEIN's Install Base and Engagement Trends in the United States



Temu and SHEIN's United States Ad Impressions



Source: Sensor Tower Mobile App Insights, Pathmatics Digital Advertising Insights
Note: Install base and open rate are iOS and Google Play combined. Digital ad impressions are aggregated across select social, display, video, and OTT ad channels in the US.

Top Retailers Win with Omnichannel Strategies

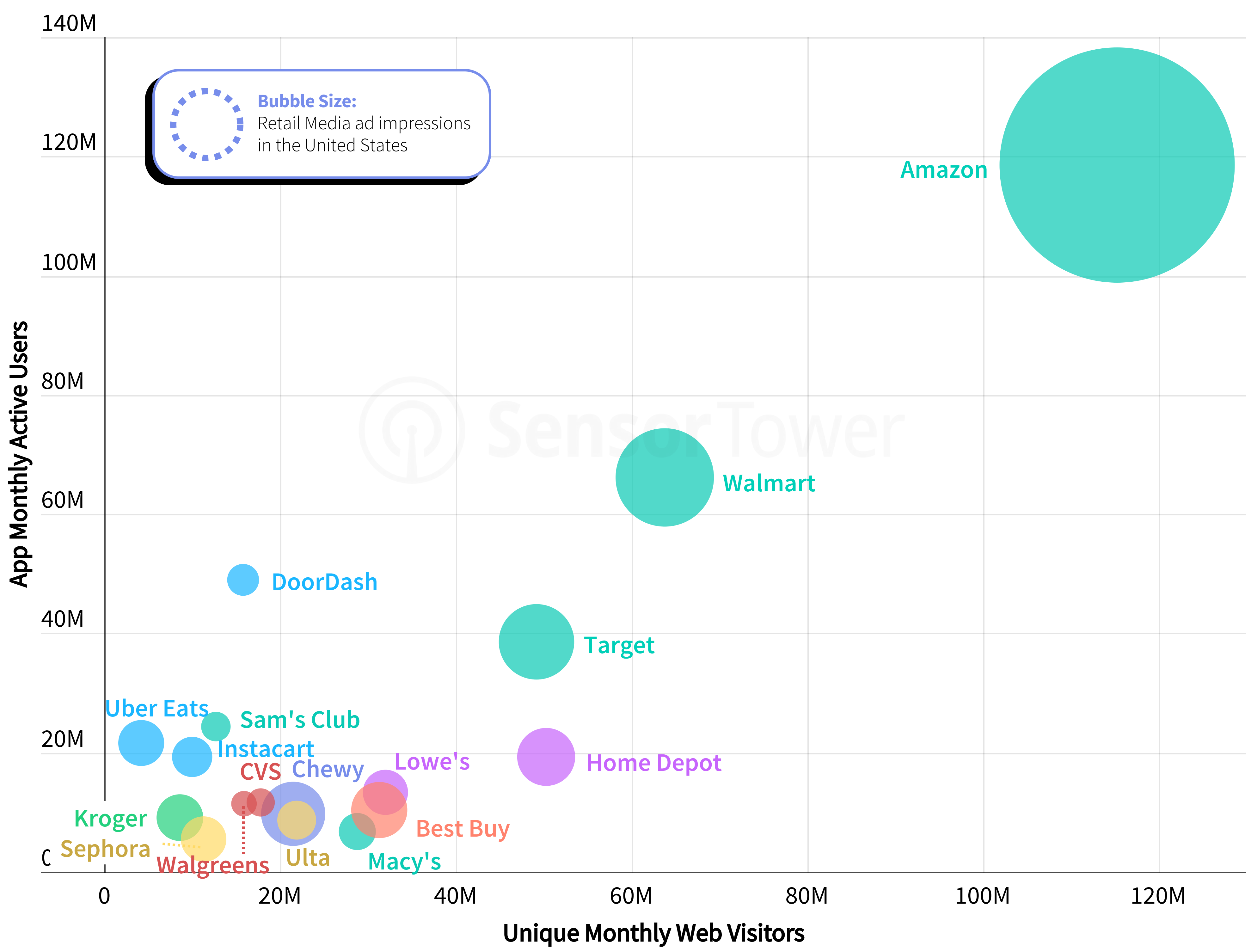
In 2025, leading retailers leaned into omnichannel strategies, reaching consumers across digital touchpoints alongside their brick-and-mortar presence. Features like online ordering with in-store pickup and seamless access to loyalty rewards via mobile apps reduce friction across devices and help drive higher conversion and repeat purchases. Amazon, Walmart, and Target led the category in combined web and mobile usage, as well as in retail media impressions.

Retail media has become a meaningful incremental revenue stream for top retailers, enabling products to be surfaced directly within high-intent shopping environments. Leaders across categories—from Home & Garden and Pet Supplies to Food Delivery—are increasingly leveraging their large digital audiences to support and scale retail media advertising.

Get the Full Omnichannel Picture
Sensor Tower measures the digital economy across mobile, web, and retail media. Learn more about our offerings here.

Source: Sensor Tower Web Insights, Retail Media Insights
Note: Data for United States in Q3 2025. Retail media impressions are total for the quarter across incldued ad channels. Mobile and web users capture unique monthly users. Apps classified using Sensor Tower's taxonomy as of January 2026.

Average Monthly Visitors and Retail Media Impressions for Top Retailers
Q3 2025 in the United States



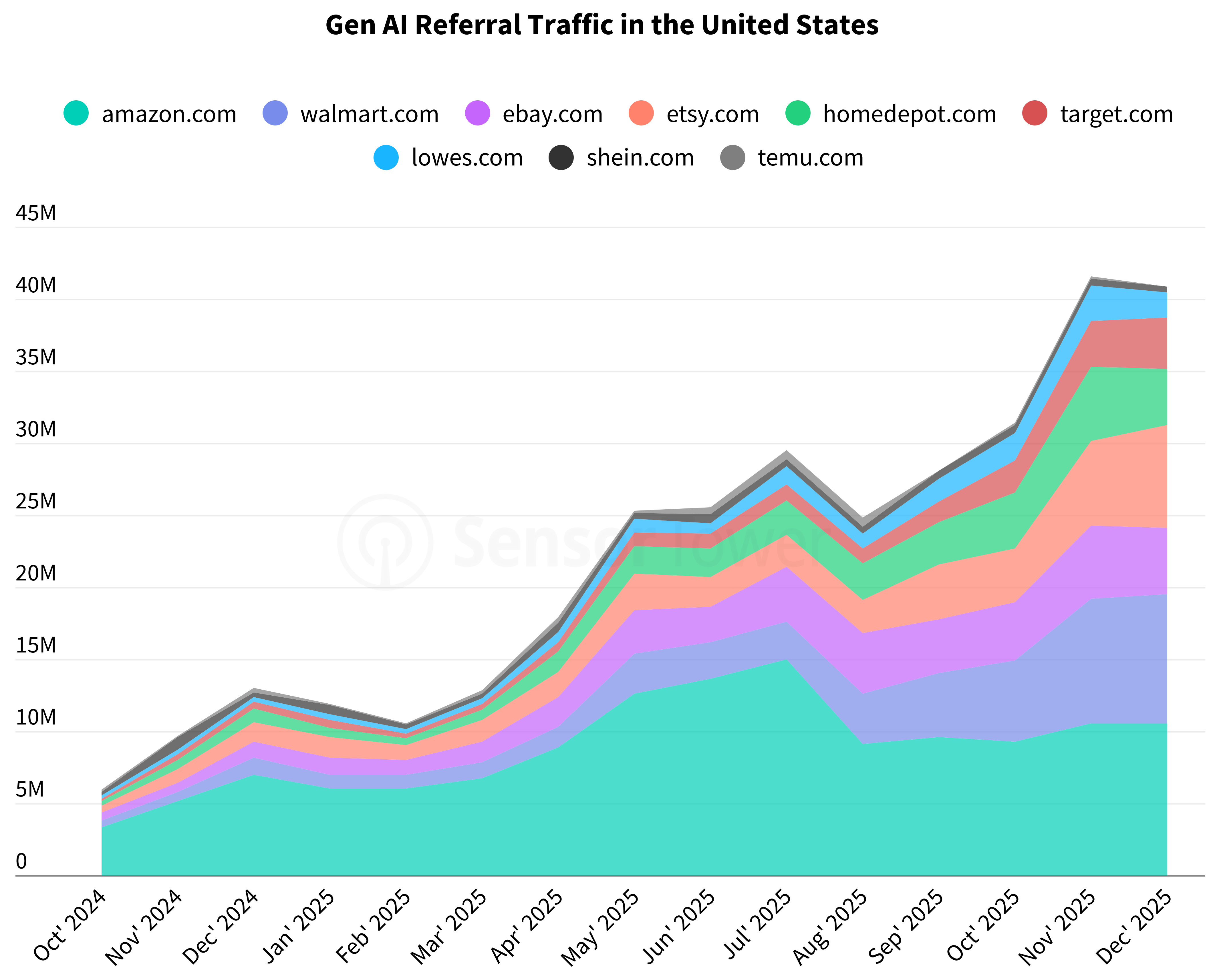
AI as the New Starting Point for Shoppers

Generative AI referral traffic to major shopping sites has surged sevenfold in a single year, climbing from nearly 6 million monthly visits in October 2024 to 41 million by December 2025. While this currently represents less than 1% of total retail traffic, the consistent upward trajectory suggests that AI is rapidly emerging as an entry point for product discovery.

Traditional US retailers, including Walmart, Home Depot, Etsy and Target, have experienced the most explosive growth, with AI-driven referrals increasing by over 1600%. This trend indicates that shoppers are increasingly leaning on AI assistants to navigate the research and comparison phases of complex purchases, particularly for home improvement projects and household essentials.

See Which Ad Channels Drive Website Traffic
Sensor Tower's Web Insights allows you to compare performance across media partners, and analyze traffic channels – *including Gen AI* – to see which platforms fuel growth.

Source: Sensor Tower Web Insights
Note: Websites classified using Sensor Tower's taxonomy as of January 2026.



Retail

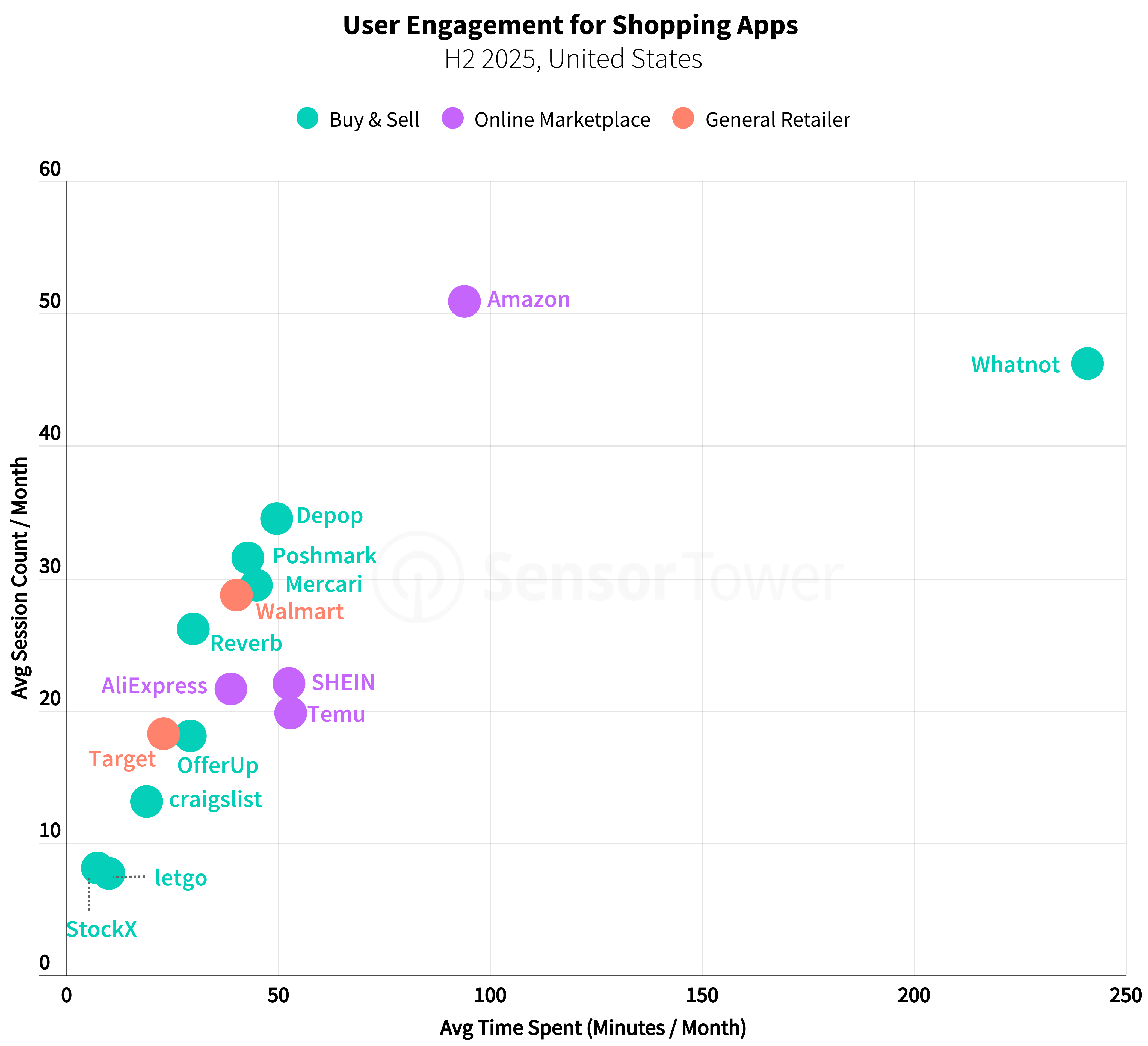
Whatnot's Rise: Winning User Engagement Through Interactive Live Shopping

Whatnot, a live shopping marketplace, was the fastest growing shopping app in the US by YoY downloads in 2025. It has successfully broken into the top five shopping apps in downloads, trailing only the retail giants Temu, SHEIN and Walmart.

Whatnot leads the industry in stickiness through its interactive live shopping features, which keep users in the app for an average of four hours per month. This is 2.6 times the time spent on Amazon (93 minutes/month) and creates a social habit resulting in 47 monthly sessions per user.

Explore Sensor Tower's Advanced Usage Insights
Obtain actionable mobile user data derived from Sensor Tower's trusted panel of millions of mobile users with Advanced Usage Insights. Advanced Usage customers can try it out with this link.

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



2025 Rankings by Market | Retail

AMER - Downloads

	Worldwide	United States	Canada	Mexico	Brazil	Argentina
1	Temu	Temu	Temu	Mercado Libre	Temu	Temu
2	SHEIN	SHEIN	Shop	Temu	Mercado Libre	SHEIN
3	Amazon Shopping	Walmart	SHEIN	SHEIN	Shopee	Mercado Libre
4	Meesho	Whatnot	Amazon Shopping	Amazon Shopping	SHEIN	Alibaba.com
5	Shopee	Shop	Costco	Coppel	Amazon Shopping	Carrefour
6	Alibaba.com	Amazon Shopping	Walmart	Spin Premia	Magalu	Shopee
7						

Download data

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

06

Video Streaming

Short drama transformed mobile video in 2025. Downloads and revenue surged as snackable storytelling went global, even as total time spent plateaued and attention shifted away from traditional OTT platforms.

Video Streaming Has Record Downloads, Revenue, and Time Spent

Video streaming downloads surged by 39% YoY in 2025, accompanied by a 18% increase in revenue. This resurgence is primarily fueled by the "short drama" phenomenon. These snackable-content platforms have dominated the rankings of the fastest-growing apps, led by Kuku TV, ReelShort, and DramaBox.

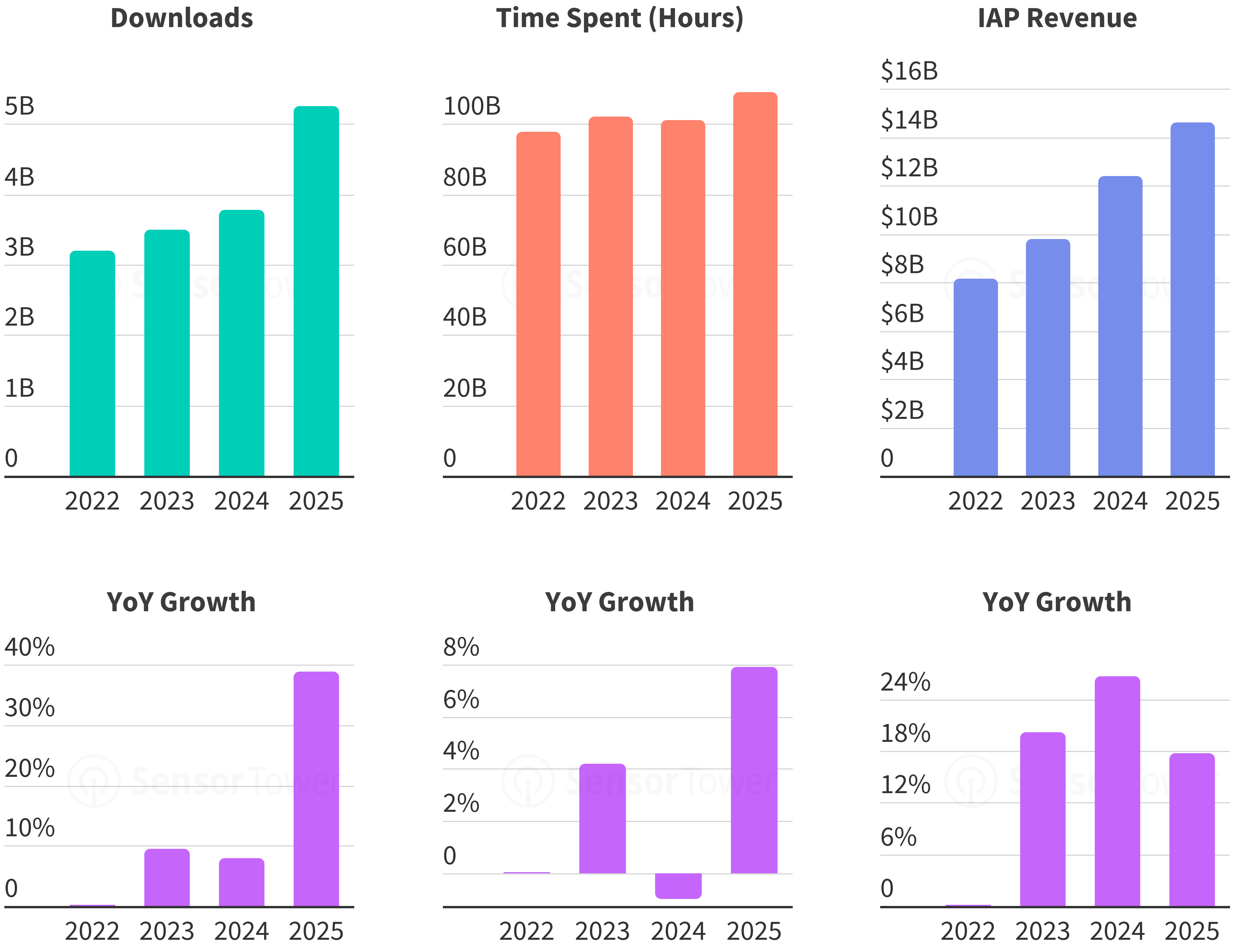
Despite this download boom, total time spent across the streaming category grew by a relatively low 8%, signaling a structural shift in consumer attention. While emerging markets like Indonesia (+45%) and India (+13%) maintained engagement growth, mature markets, including the US, Canada, and the UK, saw stagnant or declining time spent. This suggests that short drama apps are cannibalizing the time share previously held by traditional OTT platforms and social media apps, in addition to expanding the total viewing pie.

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

Yearly Trends for Video Streaming Apps

Worldwide



Video Streaming

Short Drama: The Breakout Subgenre of 2025

In 2025, short drama apps aggressively scaled their market presence. Driven by a rapid proliferation of localized productions, Short Drama downloads skyrocketed to 2.3 billion for the full year. This momentum culminated in a landmark Q4, where a 186% YoY explosion allowed the subgenre to overtake traditional OTT streaming downloads, which trailed with a 7% decline in the same period.

While DramaBox and ReelShort maintain their dominant stronghold, securing the top two spots worldwide and across North America, Latin America, and Europe, the market remains highly receptive to new entrants. The competitive landscape diversified significantly in 2025, with more than 35 different platforms surpassing 10 million global downloads each. This expansion was further bolstered by newcomers like Kuku TV, DramaWave, and RapidTV, all of which successfully entered the global top 10 rankings.

Six Predictions for 2026

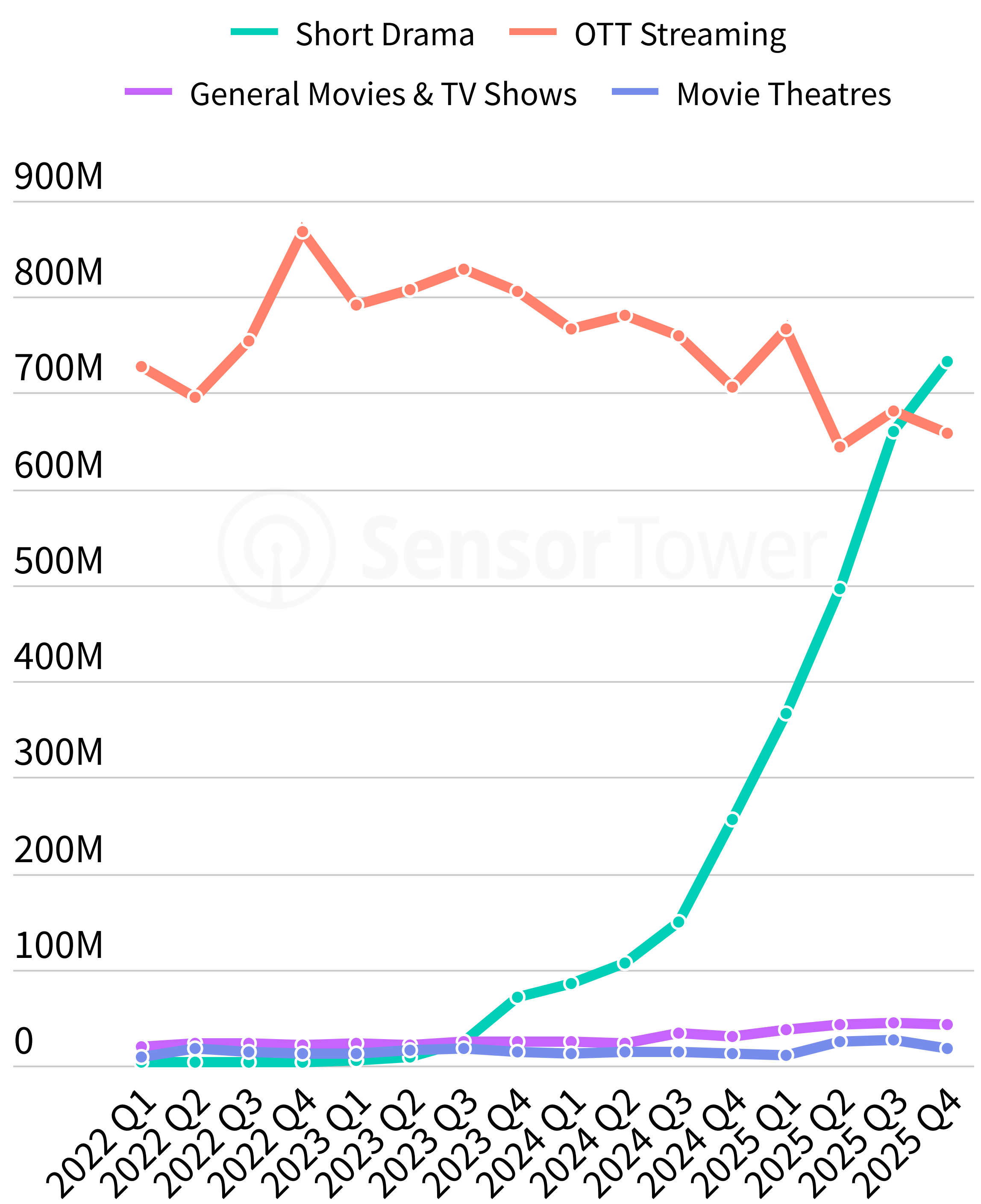
Our Predictions for the Digital Economy report forecasts the rise of Short Drama into 2026. Download the report to see this, plus five more predictions for the digital economy in 2025.

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

Video Streaming Download Trends by Subgenre

Worldwide

Quarterly Downloads by Subgenre



Top Apps by Downloads in 2025

	App	Subgenre
1	DramaBox	Short Drama
2	ReelShort	Short Drama
3	Netflix	OTT Streaming
4	Kuku TV	Short Drama
5	JioHotstar	OTT Streaming
6	Amazon Prime Video	OTT Streaming
7	Dramawave	Short Drama
8	红果短剧	Short Drama
9	RapidTV	Short Drama
10	Disney+	OTT Streaming

Video Streaming

Short Dramas is Changing the Video Entertainment Landscape Globally

Short Drama consumption is experiencing an explosive rise worldwide. Total time spent on short drama apps grew by 311% YoY by Q4 2025. During this period, its share of total video entertainment time jumped from a negligible less than 1% in Q1 2024 to more than 10% in Q4 2025.

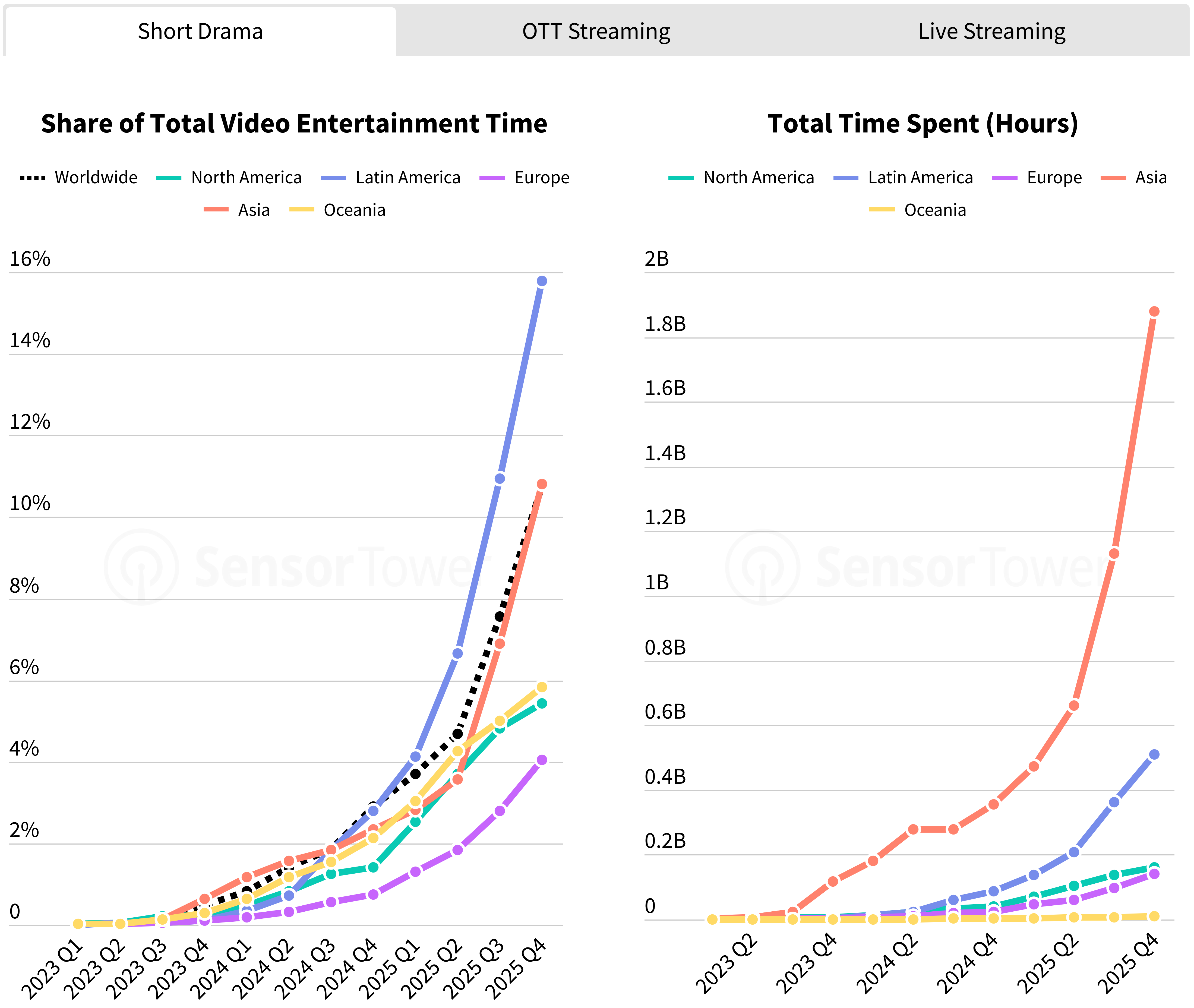
While Asia remains the largest market by volume, contributing approximately 54% of global short drama time spent in 2025, Latin America is emerging as the fastest-growing region for engagement. In Latin America, short dramas accounted for nearly 16% of total video entertainment time in Q4 2025.

Europe and North America are adopting the Short Drama format more conservatively compared to Asia and Latin America. In Q4 2025, time share for short dramas remains lower in these regions, at 4% in Europe and 5% in North America. This suggests that traditional OTT streaming and long-form viewing habits remain more deeply entrenched in Western markets.

Short Drama Apps Among the Breakout Leaders

Three Short Drama apps ranked in the top 10 by download growth in 2025. Sensor Tower Mobile App Insights customers can click here to find out which ones achieved this feat.

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



2025 Rankings by Market | Video Streaming

AMER - Downloads

	Worldwide	United States	Canada	Mexico	Brazil	Argentina
1	DramaBox	Netflix	Amazon Prime Video	DramaBox	ReelShort	ReelShort
2	ReelShort	ReelShort	Netflix	ReelShort	DramaBox	DramaBox
3	Netflix	HBO Max	Disney+	Cinépolis GO	GoodShort	Netflix
4	Kuku TV	Amazon Prime Video	Crave	Netflix	Netflix	Disney+
5	JioHotstar	Tubi	ReelShort	Tubi	Globoplay: BBB, Brasileirão +	HBO Max
6	Amazon Prime Video	DramaBox	DramaBox	Amazon Prime Video	Amazon Prime Video	RapidTV
7						

Download data

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

07

Social

Social media stabilized in 2025 as short-form video—led by Reels—captured a growing share of attention. Despite digital fatigue, social apps remained the primary destination for mobile time spent and ad dollars.

Snap Inc.

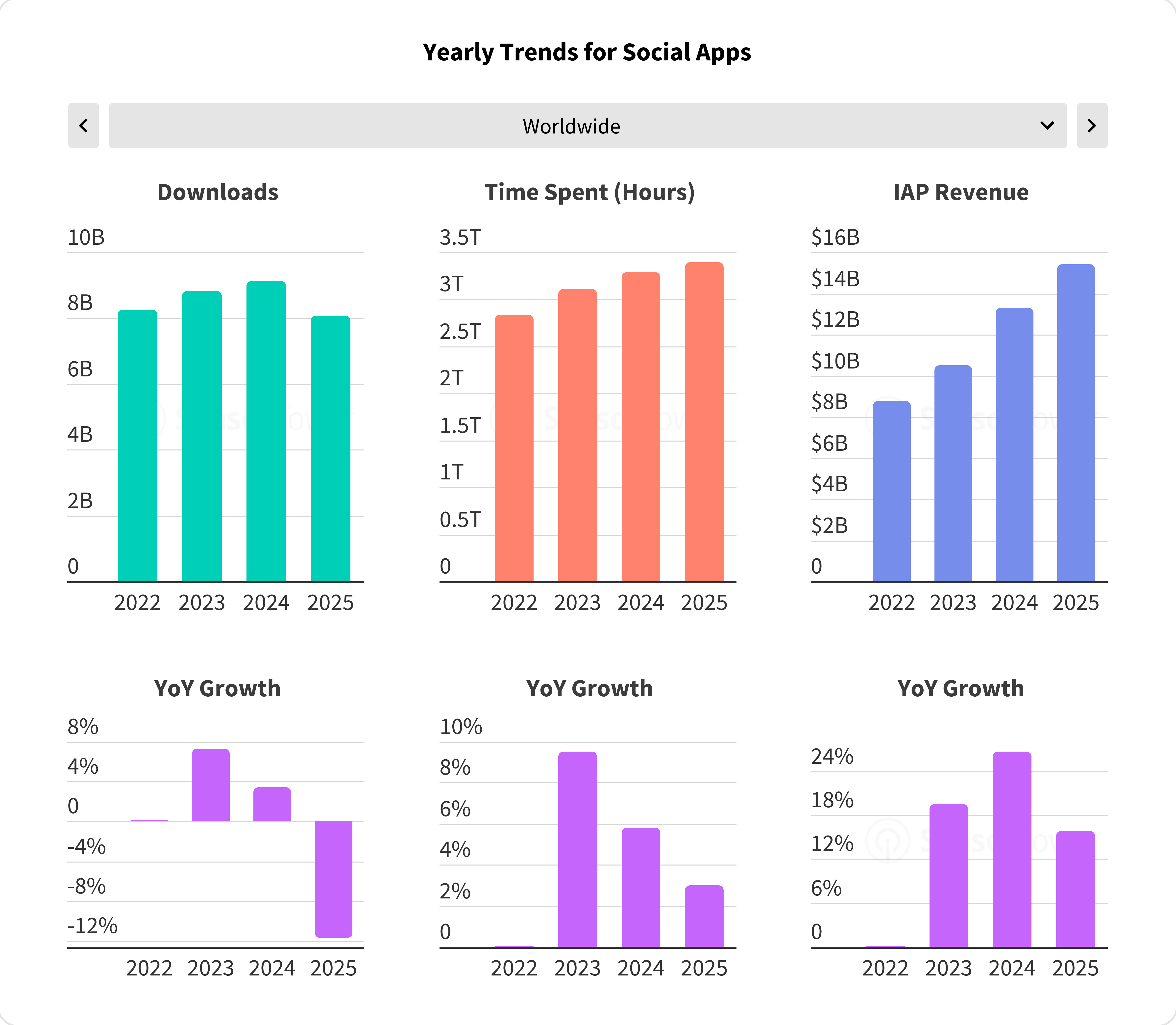
Social

Time Spent Growth on Social Media Slowed in 2025

A year after early signs of digital fatigue emerged in top markets such as the US, the slowdown in social media engagement became a global trend. Total time spent in social media apps edged up only slightly in 2025, rising from 3.3 trillion hours in 2024 to 3.4 trillion hours. In the US, time spent rebounded modestly after declining in the prior year.

Despite slowing growth, social media continues to dominate mobile engagement. More than 60% of total time spent across mobile apps in 2025 occurred within Social Media and Social Messaging apps.

Social media publishers are also accelerating their shift toward in-app purchases as privacy regulations make ad monetization more challenging. Social Media ranked as the top genre by IAP revenue in 2025, growing 16% to $15 billion. TikTok, YouTube, and Snapchat led the category, each leveraging distinct monetization strategies—from TikTok's virtual coins to YouTube's premium subscriptions and transactional content, and Snapchat's Snapchat+ subscription alongside one-time purchases like Snapstreak Restore.



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

Social

US Social Media Usage Climbed Again After Its First-Ever Decline in 2024

After social media engagement declined in late 2024 across several key markets—including the US, the UK, and Germany—the downturn did not signal a lasting shift away from social platforms. In 2025, positive growth returned in most markets, albeit at a slower pace than during the peak of the COVID-19 pandemic.

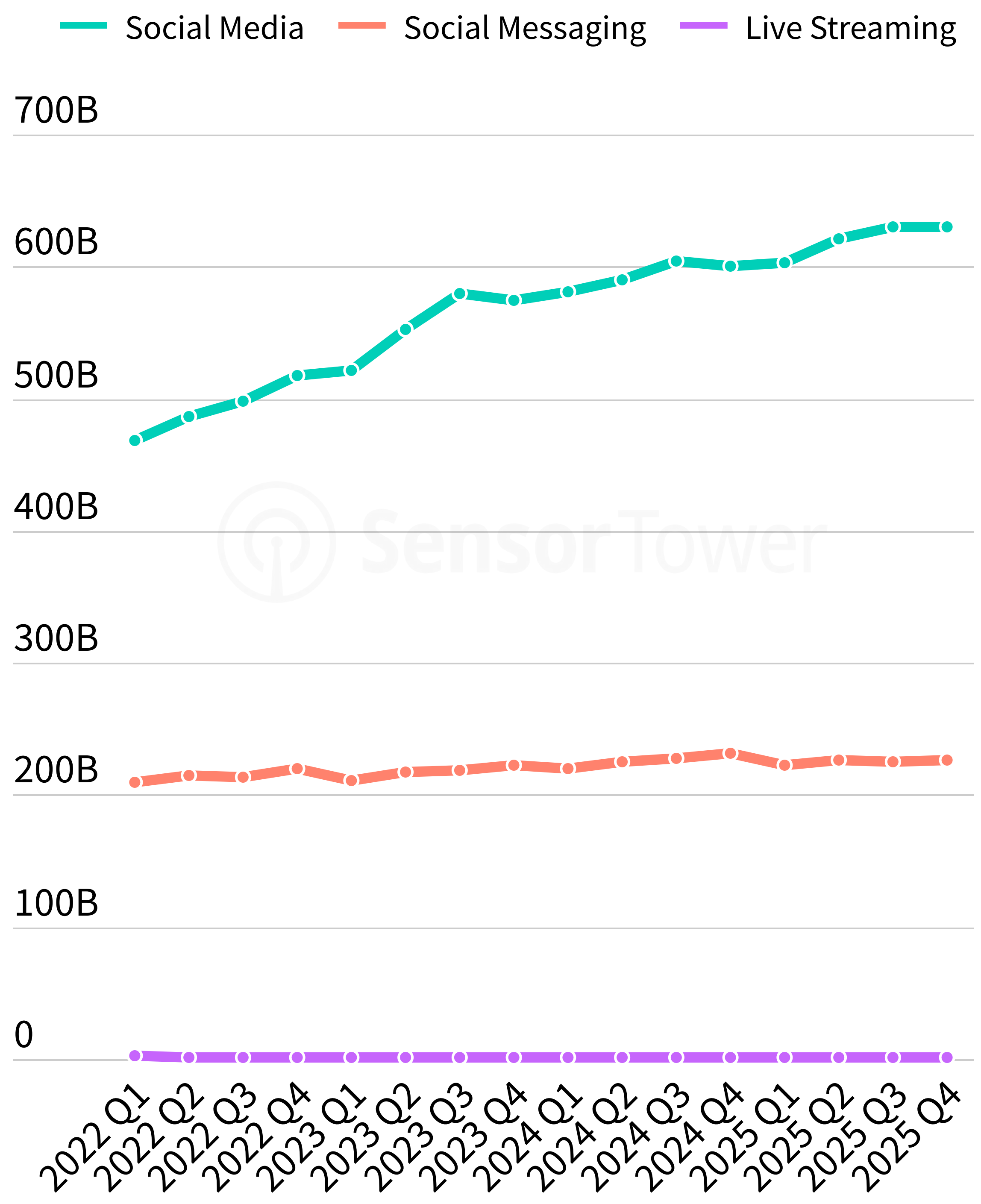
The Social Media subgenre—led by apps such as TikTok, YouTube, and Instagram—was the primary driver of renewed growth in 2025. Usage of Social Messaging and Live Streaming both declined slightly year-over-year in 2025.

Which Social Media Platform is #1 Across Devices?
Find out with Sensor Tower's True Audience metric, showing unique users across app and web.
Try it out with Web Insights.

Social Time Spent Trends by Subgenre

Worldwide

Quarterly Time Spent (Hours) by Subgenre



Top Apps by Time Spent in 2025

	App	Subgenre
1	TikTok	Social Media
2	YouTube	Social Media
3	Instagram	Social Media
4	Facebook	Social Media
5	WhatsApp Messenger	Social Messaging
6	Telegram	Social Messaging
7	Messenger	Social Messaging
8	X	Social Media
9	WeChat	Social Messaging
10	Snapchat	Social Media

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

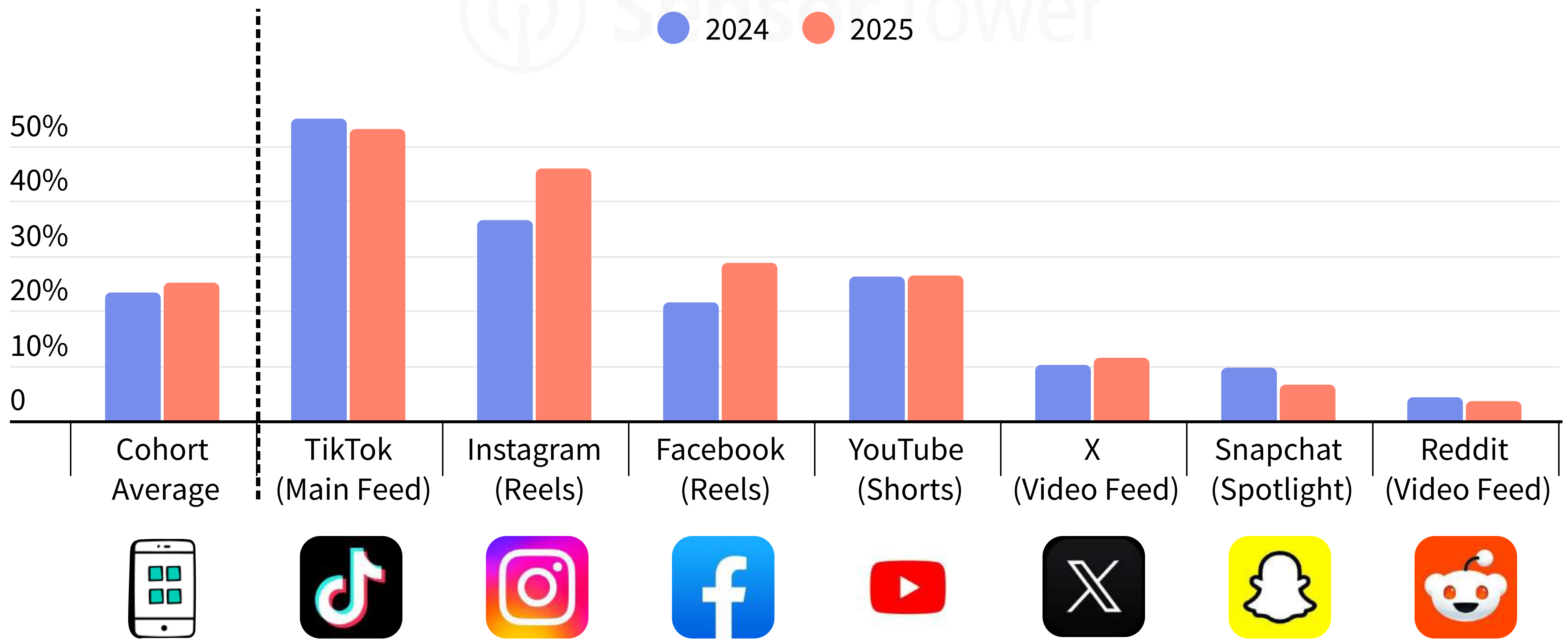
Meta Increased Its Focus on Reels to Drive Engagement

Short-form video usage increased again across leading social apps in 2025. While some major platforms, including TikTok, ended the year with a decline in short video's share of time spent, Meta's Instagram and Facebook more than offset this trend. Reels now accounts for a substantial share of engagement—46% of time spent on Instagram and 29% on Facebook. Overall, short-form video represented an average of 25% of time spent across seven key social apps in 2025, up 1.8 percentage points YoY.

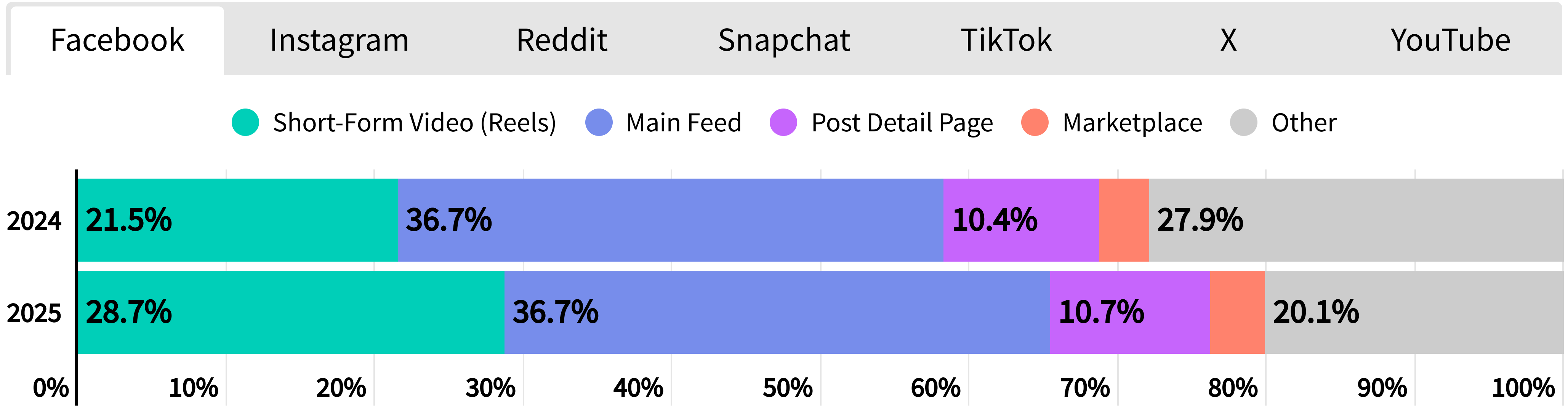
Short-form video is also expanding beyond social platforms. Apps such as ESPN and NYTimes have begun integrating vertical video formats, signaling a broader shift toward short-form video across the digital landscape as platforms compete for consumer attention.

Source: Sensor Tower
Note: Android phones in the United States in 2025.

Share of In-App Time Spent on Short Video
Android Phones in the United States



Short Video Usage in Top Social Apps
Share of Time Spent by In-App Feature



See Which Social Ad Channels Fit Best with Your Target Audience

Social remains a primary advertising channel for marketers, with social media networks such as Facebook and TikTok accounting for more than 70% of digital ad spend in the US, according to Sensor Tower's latest State of Digital Advertising report. This far outpaces other digital channels, including OTT, desktop, and mobile.

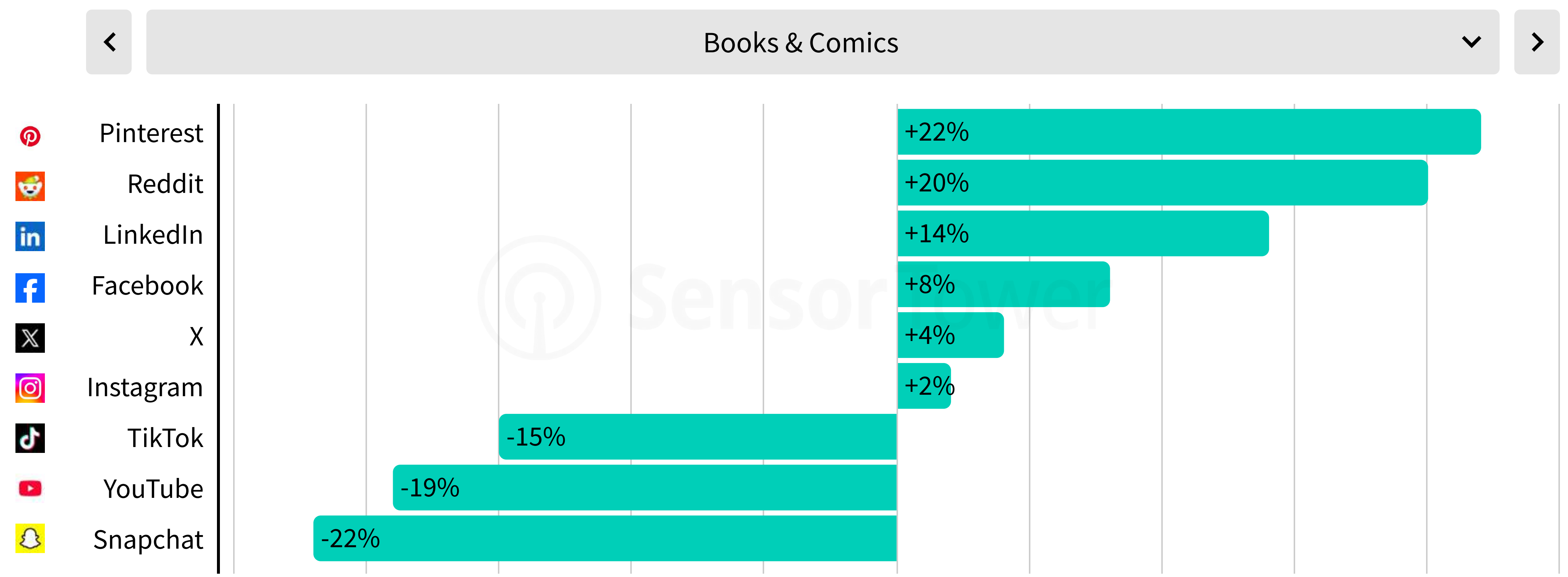
Many app categories tailor their social advertising strategies to channels that align with their core demographics. Sports app users, for example, skew more heavily male, leading advertisers in the category to invest more in platforms such as X, LinkedIn, and Reddit, which also have higher male audience shares.

Generative AI apps show a similar pattern. They frequently advertise on LinkedIn to reach business-oriented users and are more likely than the average app to invest in channels such as Reddit, X, and Instagram.

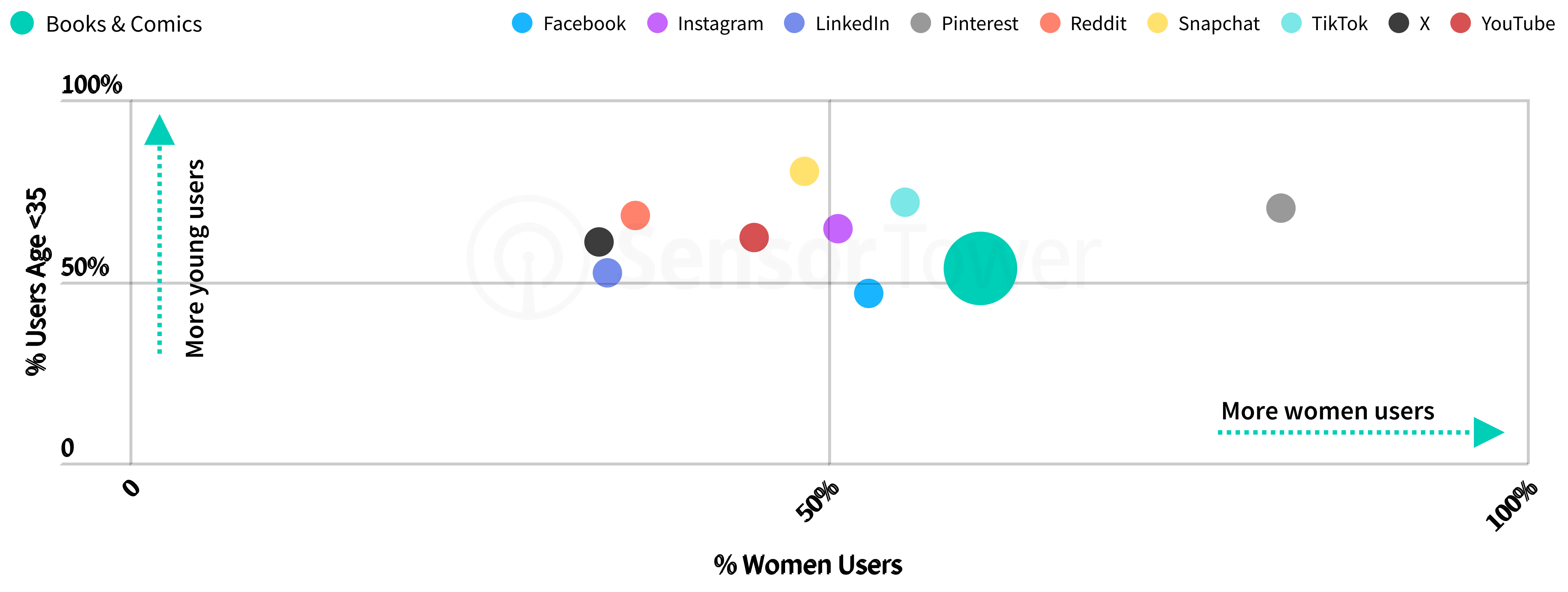
Reaching your Audience Shouldn't Be Costly
Audience Insights offers the first of its kind visibility into your existing, competitor, and potential new audiences, across all social and mobile platforms in one place.

Source: Sensor Tower Audience Insights
Note: Demographics and ad impressions for mobile app users on Android in the United States in Q4 2025. 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



2025 Rankings by Market | Social

AMER - Downloads

	Worldwide	United States	Canada	Mexico	Brazil	Argentina
1	TikTok	TikTok	Threads	TikTok	TikTok	TikTok
2	Instagram	Threads	TikTok	Facebook	Instagram	Instagram
3	Facebook	WhatsApp Messenger	WhatsApp Messenger	Instagram	Kwai	Facebook
4	WhatsApp Messenger	Instagram	Facebook	WhatsApp Messenger	WhatsApp Messenger	WhatsApp Messenger
5	Telegram	Facebook	Instagram	Threads	Threads	Telegram
6	Snapchat	Telegram	Messenger	Telegram	Facebook	Pinterest
7						

Download data

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

08

Food & Drink

Growth in Food & Drink went global in 2025. Emerging markets—led by India and the Middle East—powered record downloads as quick commerce scaled, while several mature markets slowed.

"In a highly competitive QSR landscape, digital leadership is built on data. Sensor Tower provides the insights we need to lead the category in Latin America, helping us scale app adoption, optimize acquisition, and deliver engaging digital experiences across millions of customers."

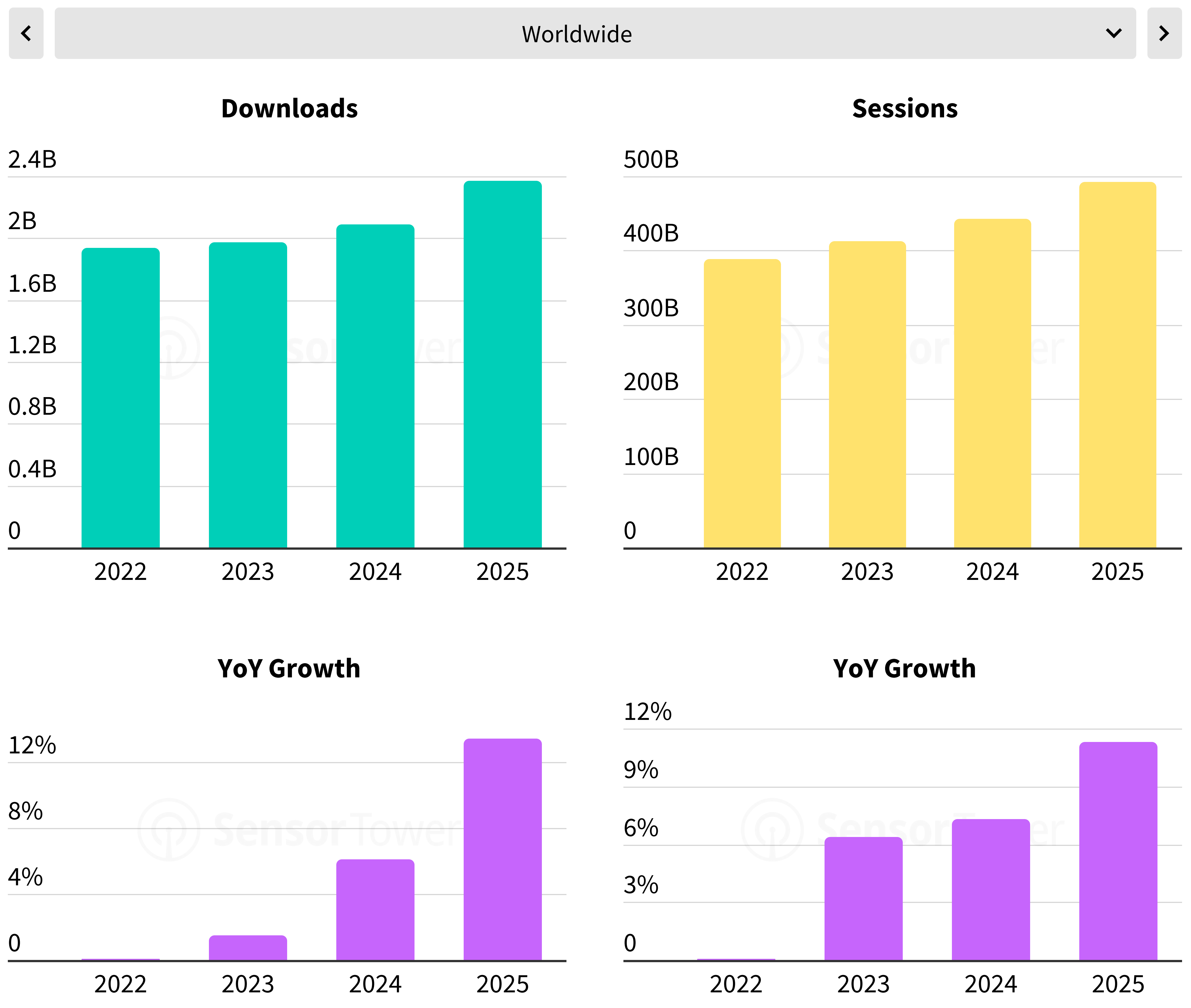
Diego Higuera
Customer Acquisition & Engagement Corporate Director
Arcos Dorados

Emerging Markets Fuel Food & Drink Growth as the US Adoption Stalls

Worldwide downloads for Food and Drink apps reached a record 2.4 billion in 2025, a 13% YoY increase driven largely by a surge in emerging regions. India led this expansion with a 56% surge in downloads, as Quick Commerce infrastructure successfully moved into Tier 2 and Tier 3 cities, transforming apps like Blinkit, Zepto, and Swiggy into daily essentials. Similarly, the Middle East solidified its status as a high-growth hub, with both Saudi Arabia and the UAE recording robust double-digit increases across downloads and user sessions.

Interested in More Food Delivery Insights?
Download our 2025 State of Food Delivery & Rideshare report!

Yearly Trends for Food & Drink Apps



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

Food Delivery Apps are Booming, Surging Past the Pandemic Peak

The global Food & Drink app market maintained a steady upward trajectory in 2025, anchored by the continued dominance of Food Delivery Services and Fast Food & Fast Casual Restaurants. These two subgenres combined to account for 77% of all category downloads worldwide, growing at a collective 15% YoY.

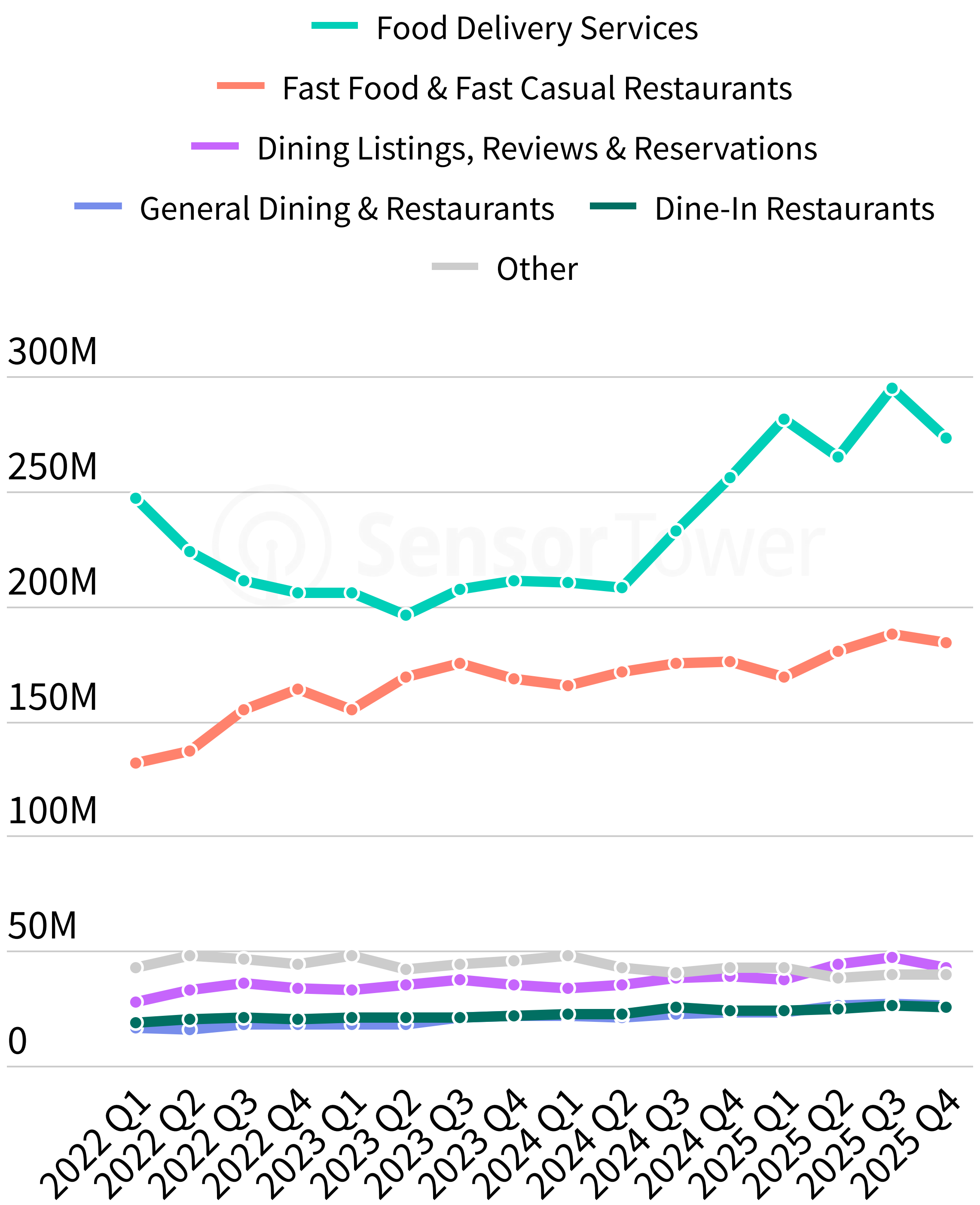
While the US market for traditional restaurant and delivery apps has reached a state of maturity, a significant behavioral shift is emerging. The Food Blogs, Coupons & Recipe Resources subgenre experienced a remarkable 52% YoY surge in downloads in 2025, signaling a pivot toward value-seeking as persistent food inflation drives consumers to prioritize home cooking and strategic deal finding. ReciMe, the fastest-growing recipe app, saw its MAUs grow 12-fold. NYT Cooking, a category leader, also continued to deepen its reach with a robust 27% increase in MAUs.

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

Food & Drink Download Trends by Subgenre

Worldwide

Quarterly Downloads by Subgenre



Top Apps by Downloads in 2025

	App	Subgenre
1	McDonald's	Fast Food & Fast Casual Restaurants
2	Blinkit	Food Delivery Services
3	KFC	Fast Food & Fast Casual Restaurants
4	Zepto	Food Delivery Services
5	Domino's Pizza	Fast Food & Fast Casual Restaurants
6	Zomato	Dining Listings, Reviews & Reservations
7	Instamart	Food Delivery Services
8	bigbasket	Food Delivery Services
9	Swiggy	Food Delivery Services
10	BURGER KING	Fast Food & Fast Casual Restaurants

Food & Drink

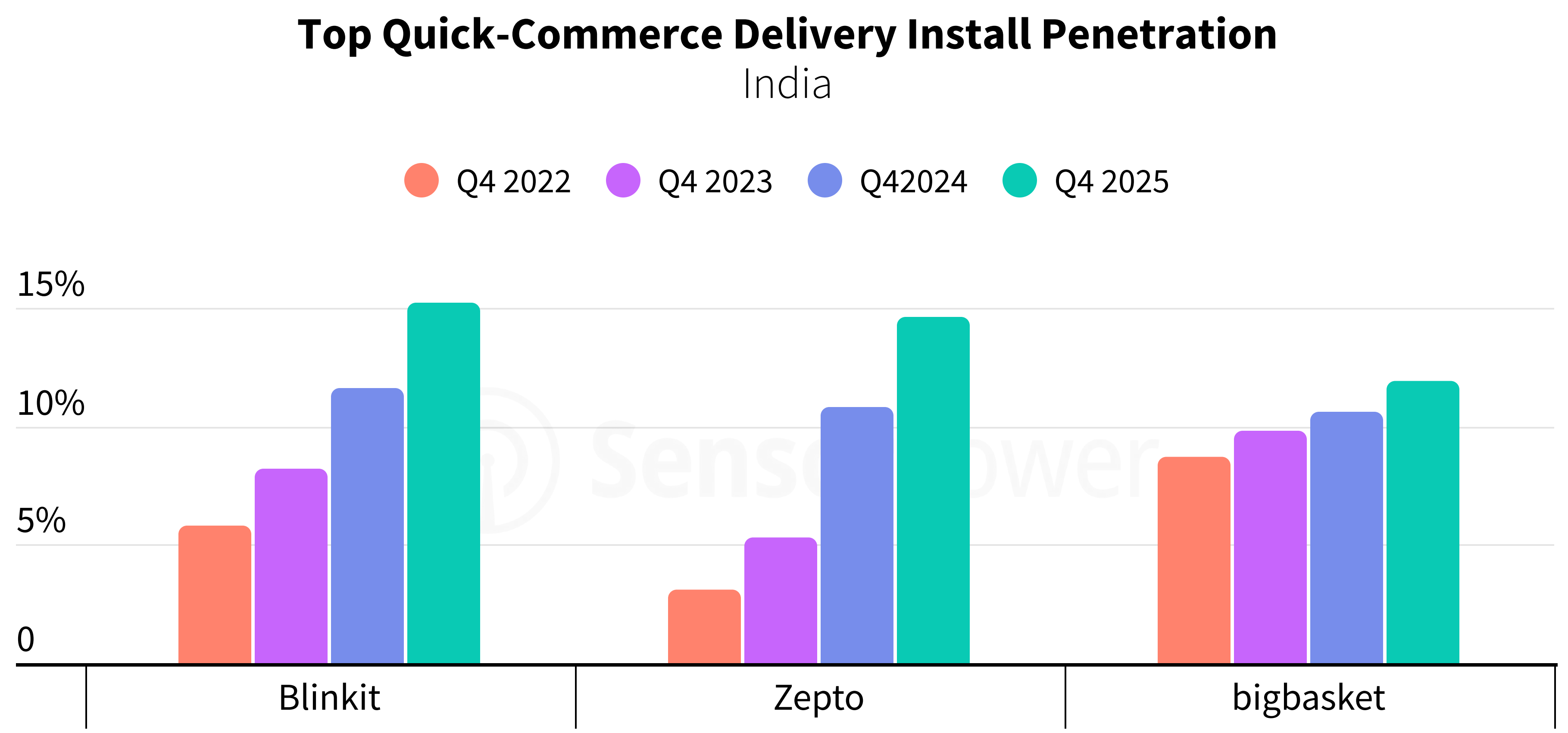
The Rapid Ascent of Quick-Commerce in India

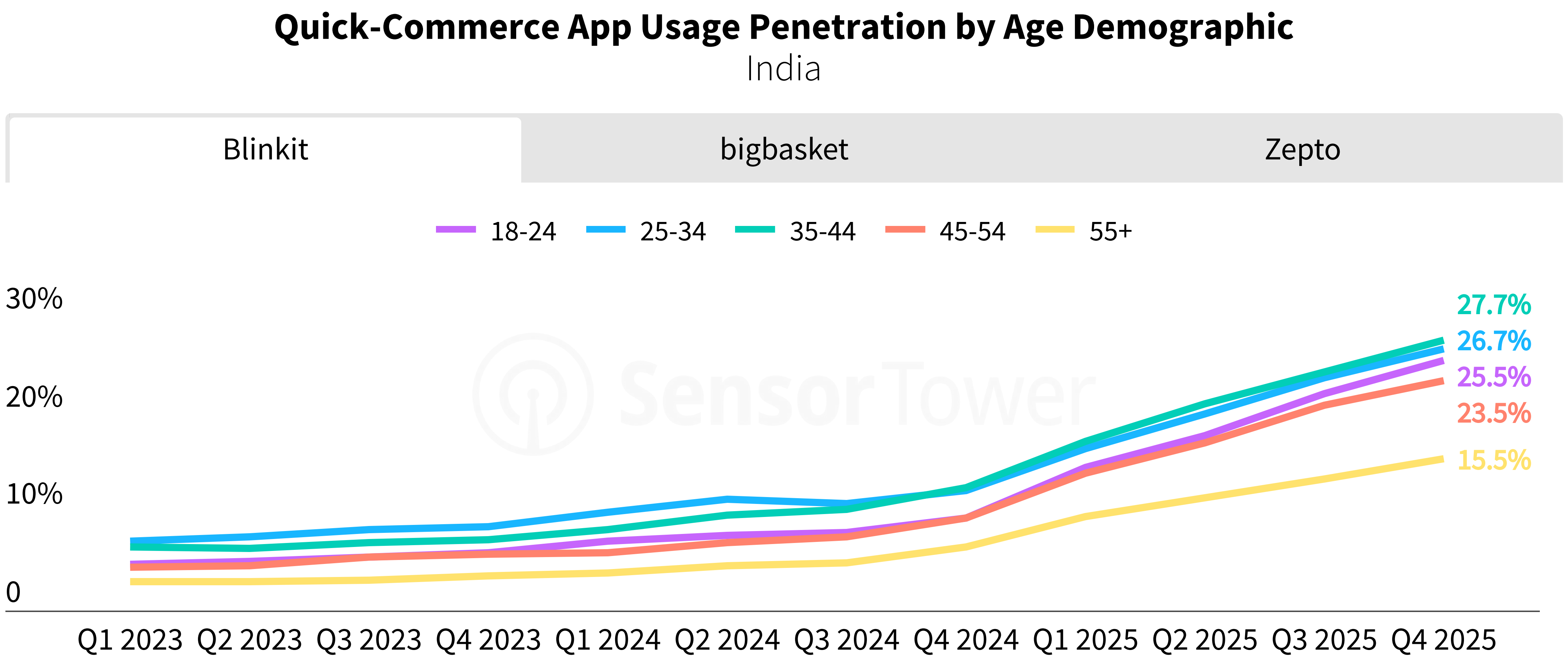
The Indian grocery landscape has undergone a dramatic transformation over the past three years, pivoting from scheduled deliveries to instant fulfillment. While Blinkit tripled its market penetration from 6% to 15%, Zepto delivered an even more aggressive performance, surging from a modest 3% base to nearly 15% (up 12 ppts) and effectively closing the gap with Blinkit. Meanwhile, although the 2022 incumbent leader, bigbasket, saw more gradual growth, it maintained a steady YoY climb to reach nearly 12% penetration by 2025.

The 35–45 age group, typically the primary wage earners and household planners, has emerged as the most critical segment for the quick-commerce market. Compared to all other age groups, this demographic shows the highest adoption rate of platforms like Blinkit and bigbasket.

Understand the Reach of Key Mobile Apps
See how widely an app is installed (Install Base, Install Penetration), how actively it is used (Usage Penetration), and how frequently users return (Open Rate) with Acquisition & Churn, part of Sensor Tower's Mobile App Insights.

Source: Sensor Tower Mobile App Insights
Note: App install penetration across iOS and Google Play





Food & Drink

Uber's Diversified Ad Strategy Wins QSR Trust

Uber Eats has successfully captured the trust and advertising investment of major Quick Service Restaurants (QSRs) by moving beyond simple transactional discounts. In 2025, 15 of the top 20 QSR brands, including Burger King, McDonald's, and Pizza Hut, allocated over 90% of their co-marketing budgets to the Uber Eats retail media network (RMN).

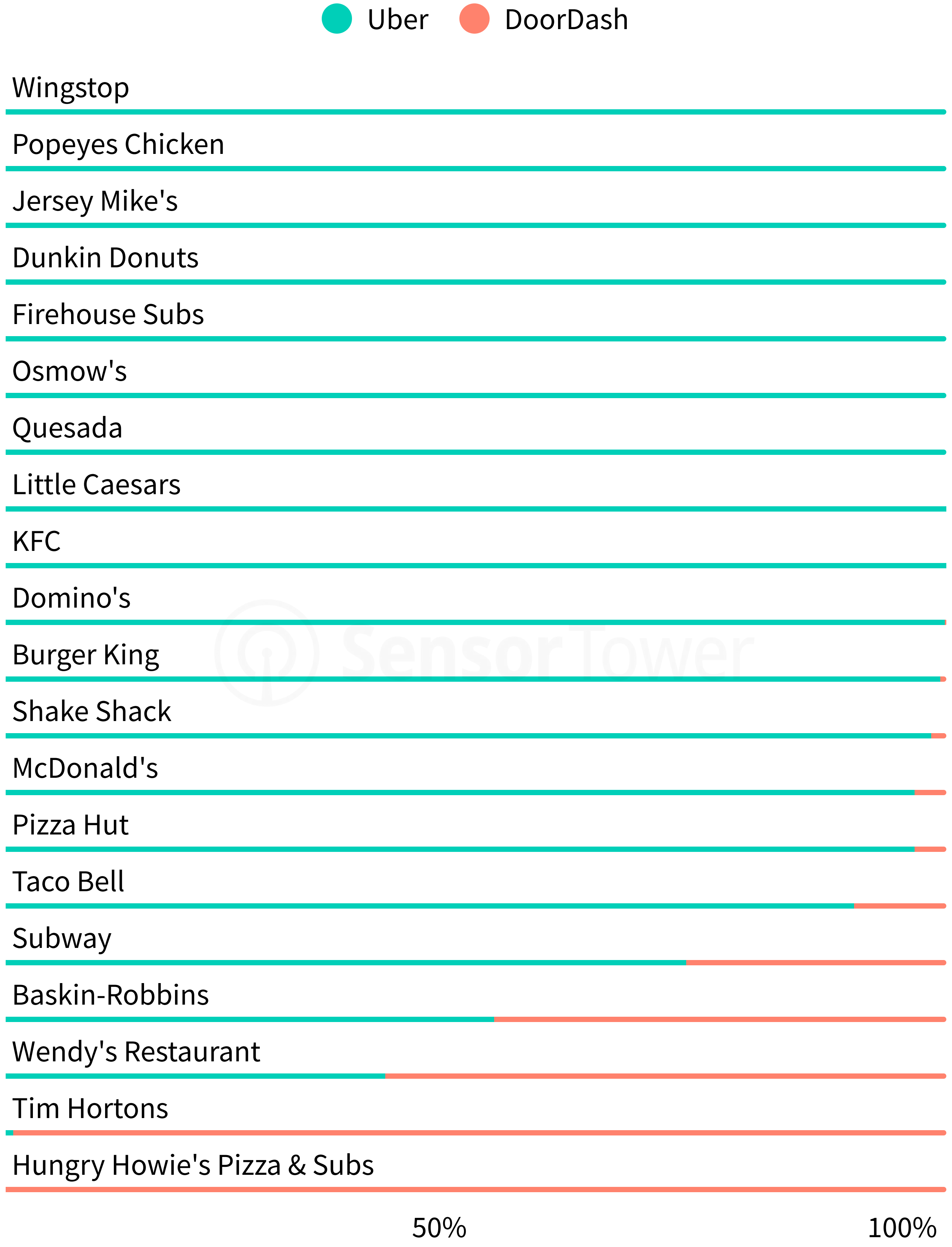
While DoorDash relies primarily on conversion-oriented discounts for new users, Uber creates a seamless link between sports fandom and hunger. Through its 'Football is for Food' and basketball-themed campaigns, Uber makes QSR brands like McDonald's, KFC, and Wingstop feel native to the fan experience. Furthermore, the specialized 'Uber One for Students' program has incentivized QSRs to bid on co-marketing space to effectively reach Gen Z.

Get More Retail Media Insights

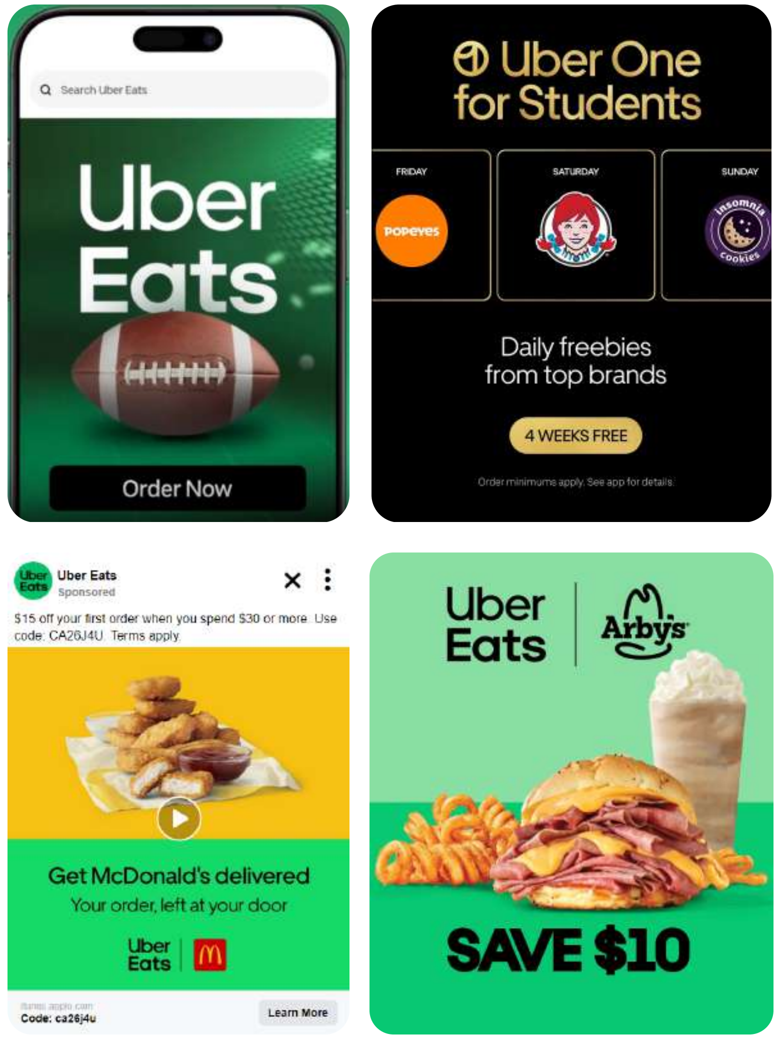
Get the full omnichannel view with visibility into the co-branded campaigns, retail media networks, and the broader digital advertising landscape.

Source: Sensor Tower Retail Media Intelligence
Note: Data for United States in the first 11 months of 2025

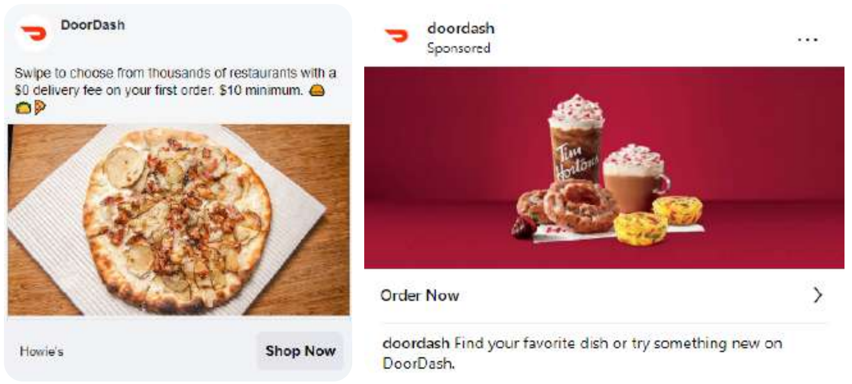
Top QSR Advertisers' Share of Impressions Delivered by Uber Eats and Target



Uber Offsite Ads



DoorDash Offsite Ads



Note: Offsite ads are ads displayed on other websites, social media platforms, or OTT, as opposed to the retailer's own website or app. For example, this includes co-branded advertisements on Facebook, TikTok, and YouTube.

2025 Rankings by Market | Food & Drink

AMER - Downloads

	Worldwide	United States	Canada	Mexico	Brazil	Argentina
1	McDonald's	McDonald's	McDonald's	Rappi	iFood comida e mercado em casa	PedidosYa
2	Blinkit	DoorDash	DoorDash	DiDi Food	Zé Delivery	McDonald's
3	KFC	DoorDash - Dasher	Tim Hortons	Uber Eats	McDonald's	Mostaza
4	Zepto	Uber Eats	Uber Eats	McDonald's	BURGER KING	Grido
5	Domino's Pizza	Taco Bell	Too Good To Go	Domino's Pizza	iFood	Cheaf
6	Zomato	Domino's Pizza	Starbucks	KFC	Keeta	Rappi
7						

Download data

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

09

Travel

Travel app growth remained resilient in 2025, led by rapid expansion in emerging markets and increasing engagement in mature ones. Competition intensified across travel booking, rideshare, and transportation.

Travel

Travel Apps Maintain Steady Upward Trajectory in 2025

The travel sector continues its steady upward trajectory, with both global downloads and time spent grew by 3% and 8% YoY in 2025, respectively. This growth is increasingly driven by emerging markets where travel infrastructure and digital adoption are rapidly expanding. Markets such as Vietnam (+21%) and the United Arab Emirates (+17%) are currently leading the world in new app downloads.

In contrast, the United States represents a highly consolidated market. Dominant players, such as Expedia, Airbnb, and Uber, have achieved such deep penetration that massive download growth is no longer the primary driver of success. While US downloads in 2025 are up only 2% compared to 2022, total time spent has surged by 29% over the same period. This indicates that US growth is primarily fueled by increased session depth and user retention within existing apps, rather than new user acquisition.

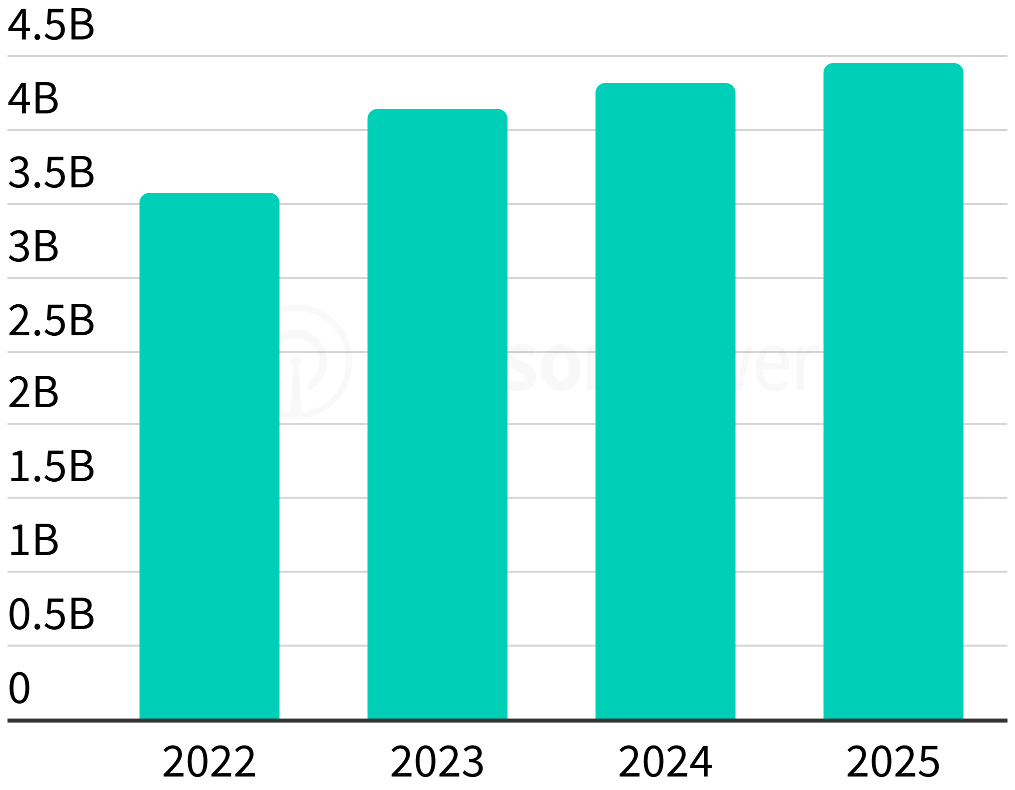
Looking for More Global Travel Trends?
Dive into our Quarterly Global Travel Report for a comprehensive look at the industry.

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

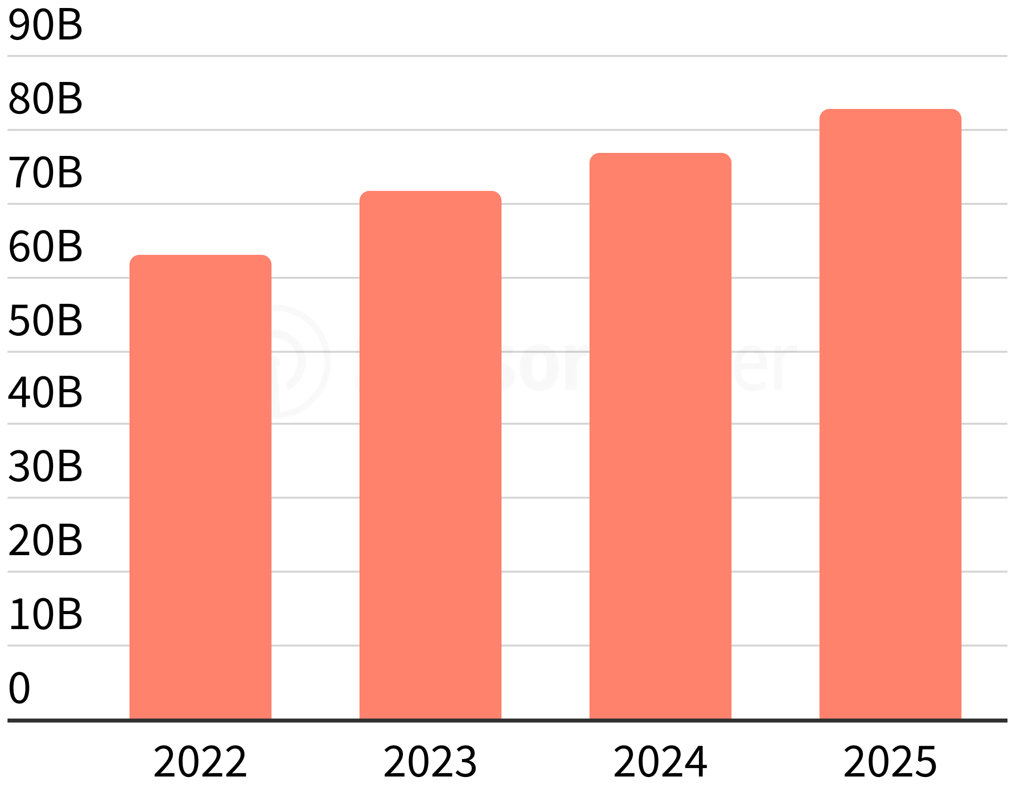
Yearly Trends for Travel Apps

Worldwide

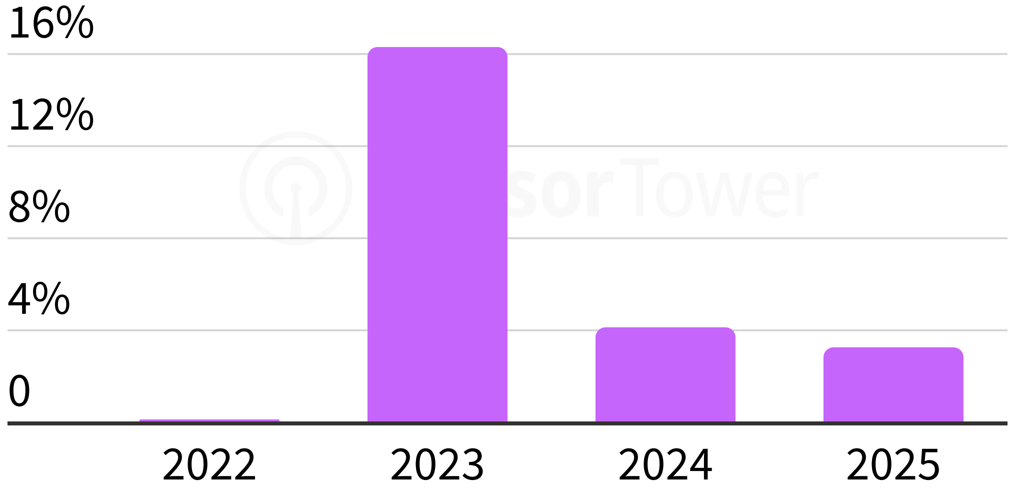
Downloads



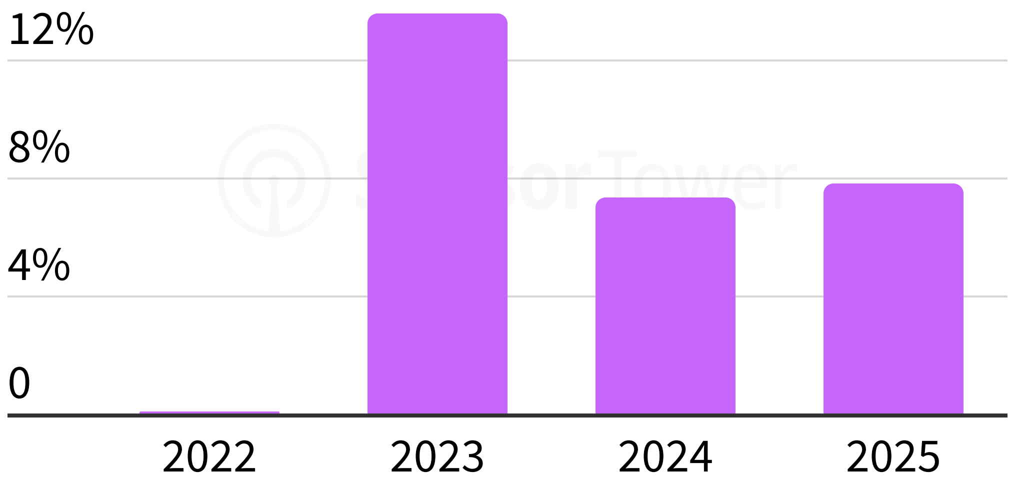
Time Spent (Hours)



YoY Growth



YoY Growth



Travel

Super App Ecosystems are Winning the Rideshare Market

The Carpooling & Ridesharing subgenre has emerged as a global powerhouse of growth in 2025, with worldwide downloads increasing 15% YoY in Q4 2025. This surge is particularly pronounced in Turkey, which saw a staggering 126% YoY increase, followed by significant expansions in the UAE (+64%) and China Mainland (+47%).

While Uber maintains a massive global footprint, local players are successfully defending their territory by leveraging super app ecosystems. In Southeast Asia, Grab continues to dominate by embedding GrabPay and GrabFood into its core mobility platform, remaining a top five travel app in Singapore, Thailand, and Vietnam.

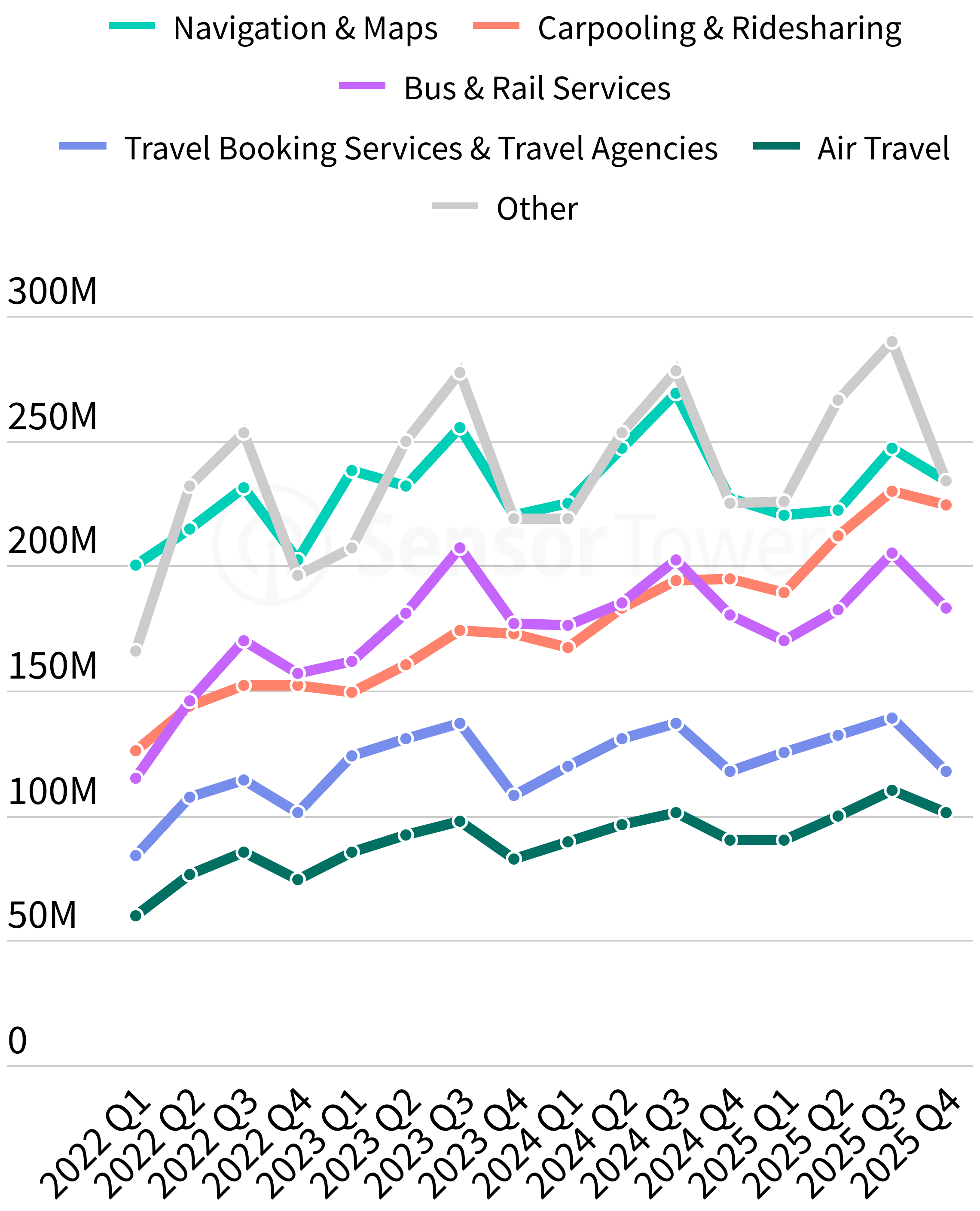
Similarly, in the UAE, Careem has solidified its lead through its 'Everything App' strategy, consistently outranking Uber in local market share. This trend is also occurring in Brazil, where 99 has evolved into a comprehensive ecosystem offering rideshare, 99Food, and 99Pay. This multi-service approach propelled 99 to surpass Uber in downloads within the Brazilian market in 2025.

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

Travel Download Trends by Subgenre

Worldwide

Quarterly Downloads by Subgenre



Top Apps by Downloads in 2025

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

Travel

Travel Booking Services Search for New Users in a Competitive Space

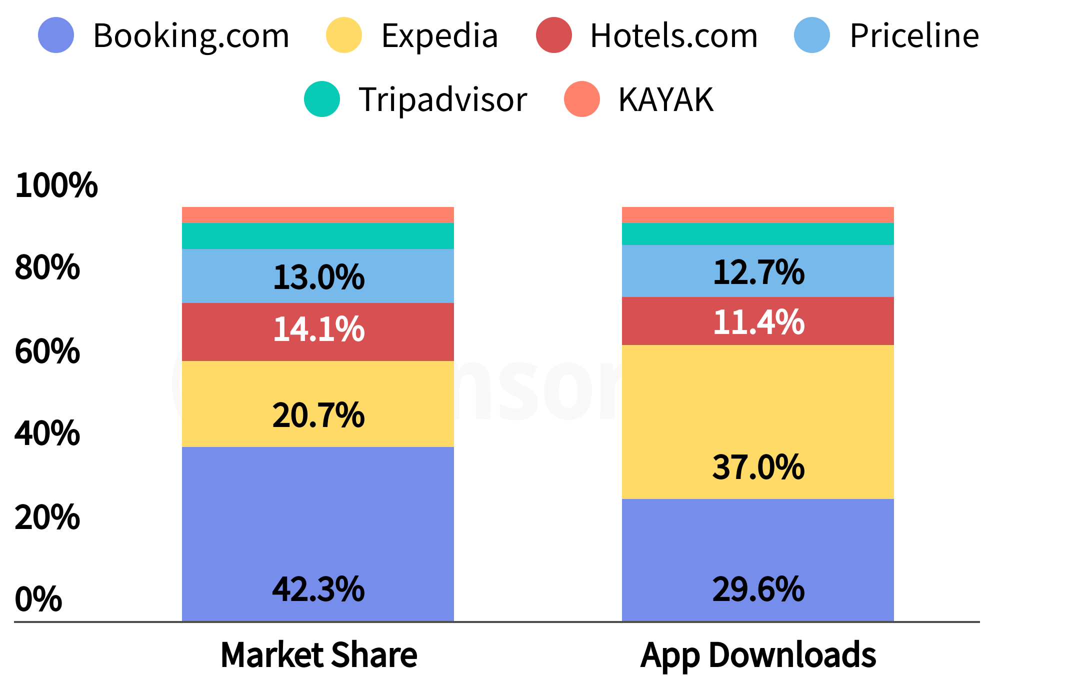
The Travel Booking and Online Travel Agency (OTA) app market in the US is highly competitive. Expedia led the category with just a 20% share of total US OTA downloads in 2025, while 17 other apps each captured at least 1% of the market. As a result, major players such as Booking.com and Hotels.com invested heavily in mobile advertising to drive adoption, particularly during peak summer travel months.

While many OTAs focused on building brand awareness and promoting deals, Expedia's portfolio of apps was especially effective at driving installs. Expedia and Hotels.com generated a notably high share of downloads from paid display in 2025, supported by advertising across platforms including Facebook, Instagram, TikTok, and YouTube. As a result, Expedia and Hotels.com ranked first and fourth, respectively, by US downloads among OTA apps in 2025.

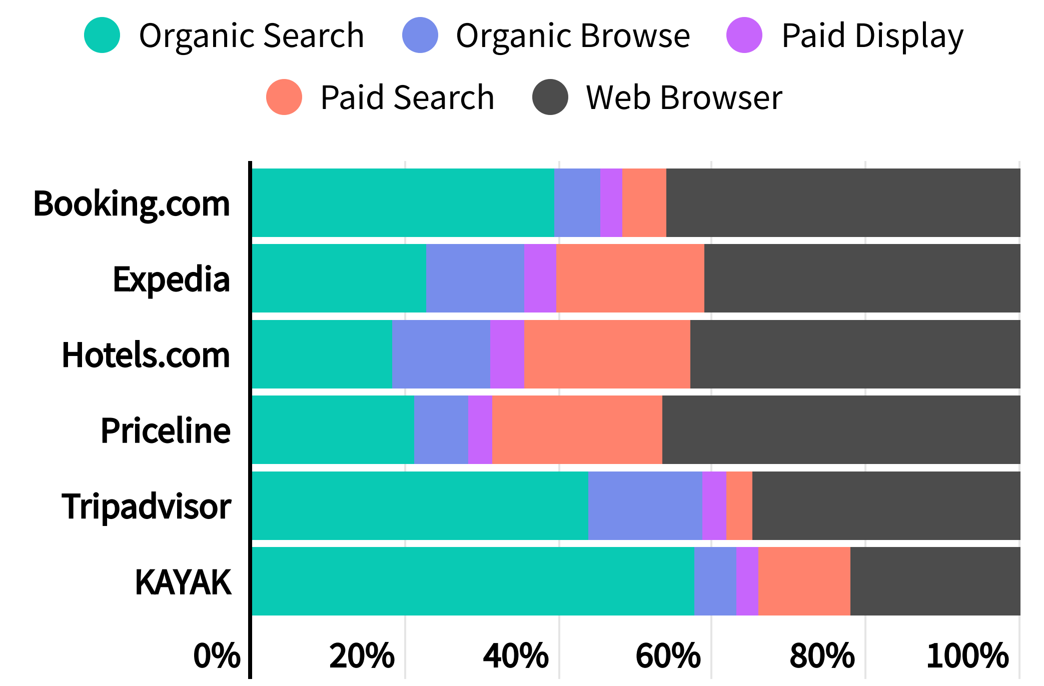
Understand the Paid UA Strategies of Top Apps
See exactly where competitors put their ad budgets with Impression Share, part of App Advertising Insights.

Source: Sensor Tower Mobile App Insights
Note: Includes the top six Travel Booking Services apps in the United States by mobile ad impressions in 2025. Downloads iOS and Google Play combined. Downloads channels are Google Play only. Apps classified using Sensor Tower's taxonomy as of January 2026.

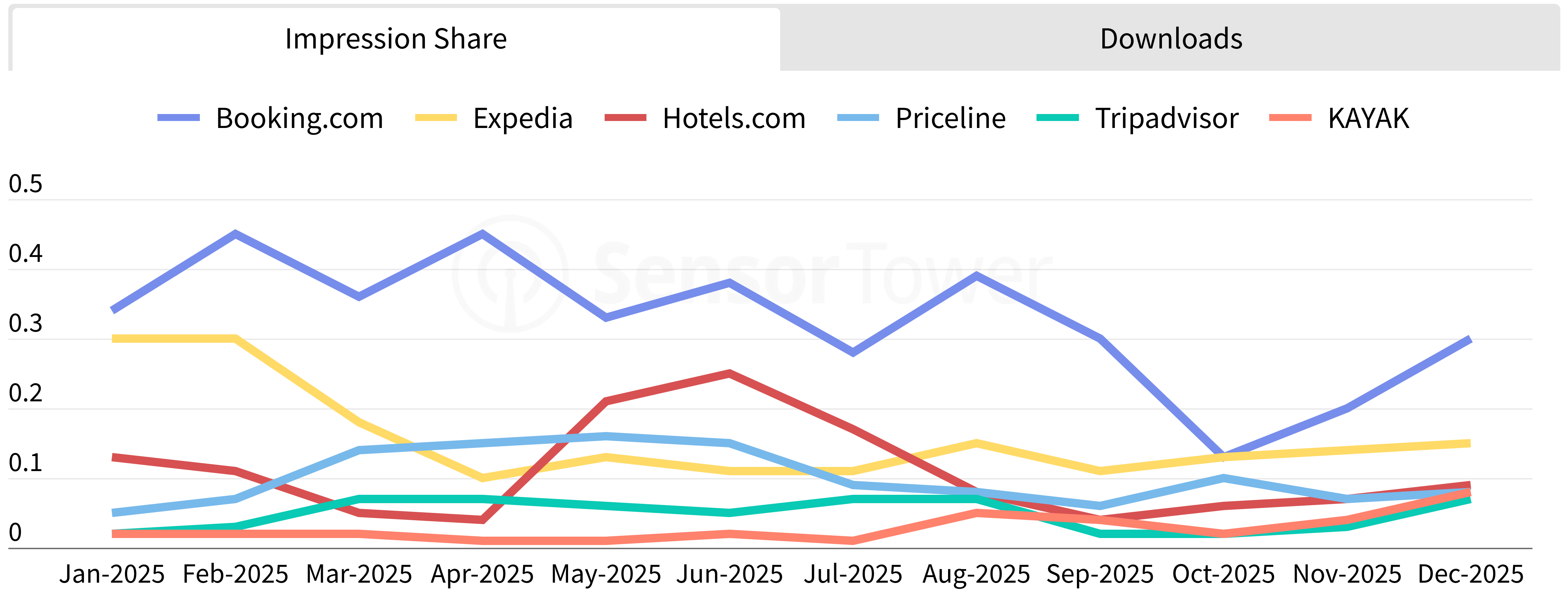
United States Mobile Ad Impressions vs. App Downloads for Top OTA Apps in 2025



United States Downloads Channels for Top OTA Apps in 2025



United States Monthly Ad Impression Share vs. App Downloads



Travel

Waymo Achieving Double-Digit Share in Phoenix and San Francisco

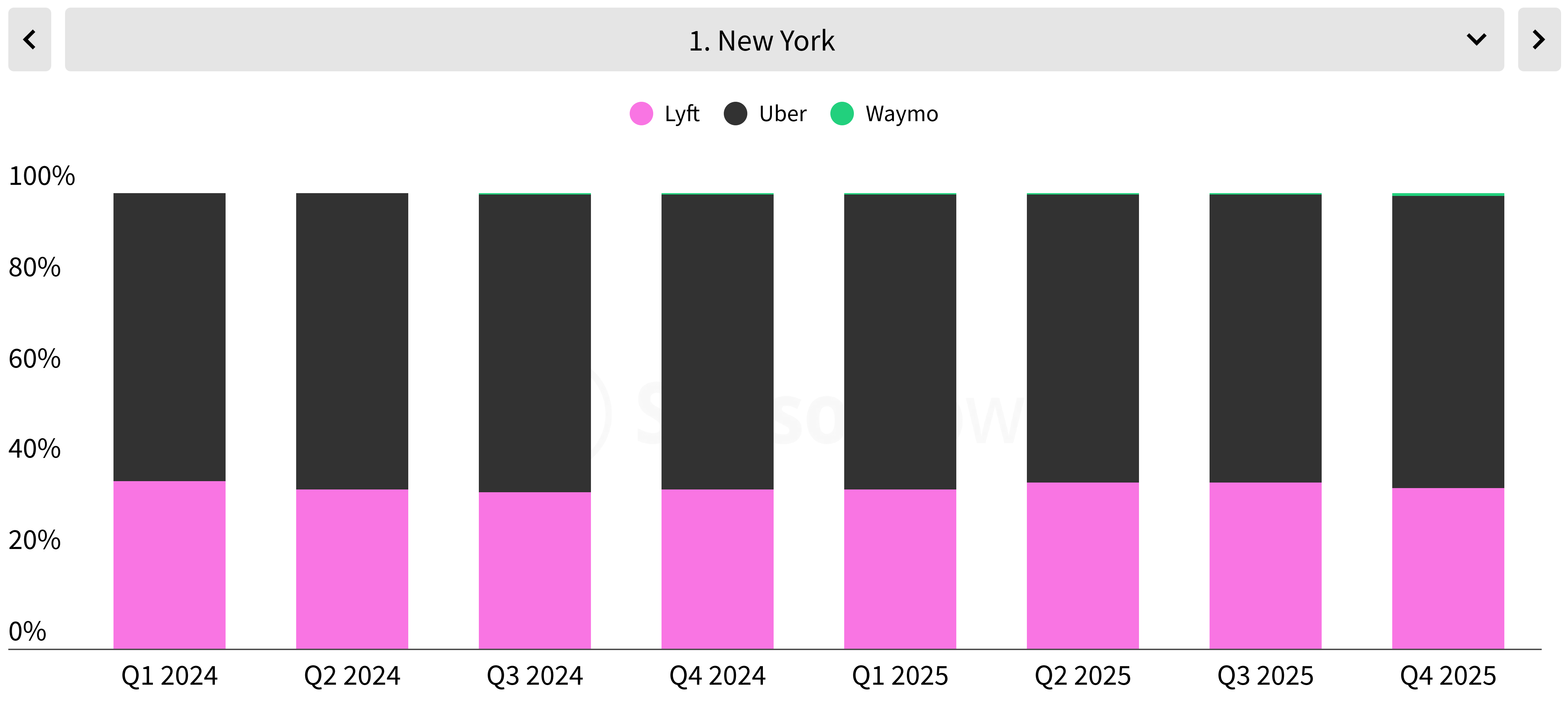
Driven by ongoing expansion efforts, the Waymo app achieved significant user acquisition in 2025 in the US, with downloads surging by 94% and monthly active users (MAUs) increasing by over 130% YoY. Its active user share has grown steadily, most notably in San Francisco and Phoenix, where it captured nearly 15% of active rideshare users by Q4 2025. In Los Angeles, following a citywide expansion in late 2024, Waymo secured an 8% share of active users.

Despite operating in a limited number of major metropolitan areas, via the standalone Waymo app in Phoenix, San Francisco, and Los Angeles, and through exclusive Uber integration in Austin and Atlanta, Waymo has demonstrated powerful and accelerating market penetration. Across the US, the percentage of Lyft and Uber users who also utilize Waymo increased from less than 1% in Q4 2024 to 3.9% and 2.8%, respectively, by Q4 2025. This trend underscores a growing consumer willingness to cross-shop between traditional and autonomous mobility services.

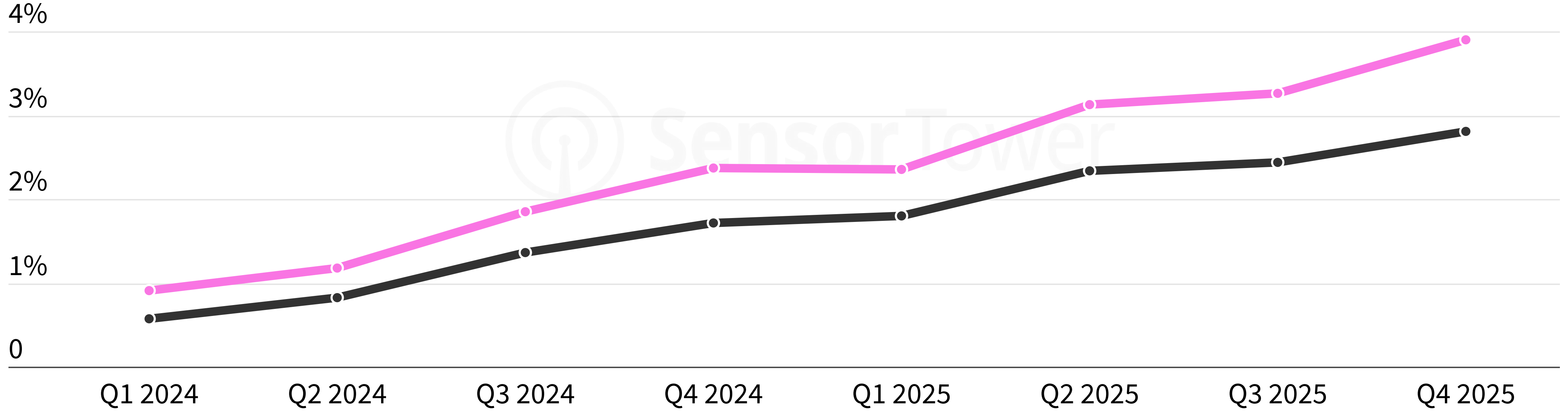
Unlock Hyper-Local Insights with Metro-Level Data
Gain a competitive edge by tracking active user trends across top metropolitan areas in over 20+ markets.

Source: Sensor Tower Mobile App Insights
Note: iOS and Google Play combined. Active user market share is at the app-user level, meaning it double counts users using multiple of these rideshare apps. Usage penetration for Google Play apps only. Apps classified using Sensor Tower's taxonomy as of January 2026.

Rideshare App MAU Share in Top US Cities in Q4 2025



Waymo's Penetration into Lyft and Uber's Existing User Bases
United States



2025 Rankings by Market | Travel

AMER - Downloads

	Worldwide	United States	Canada	Mexico	Brazil	Argentina
1	Uber	Google Maps	Uber	DiDi Rider	99	Uber
2	Google Maps	Uber	Google Maps	Uber	Uber	DiDi Rider
3	Waze	Lyft	Lyft	inDrive	Waze	SUBE
4	inDrive	Airbnb	Air Canada + Aeroplan	Volaris	Airbnb	DiDi Driver
5	Where is my Train	Waze	Airbnb	Google Maps	Google Maps	Uber - Driver
6	Airbnb	Expedia	Expedia	DiDi Driver	JET	Cabify
7						

Download data

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

10

Health and Fitness

AI re-energized mobile Health & Wellness in 2025. Revenue reached a new peak as nutrition, fitness, and outdoor exercise apps used generative AI to deepen personalization, improve outcomes, and attract high-intent users.

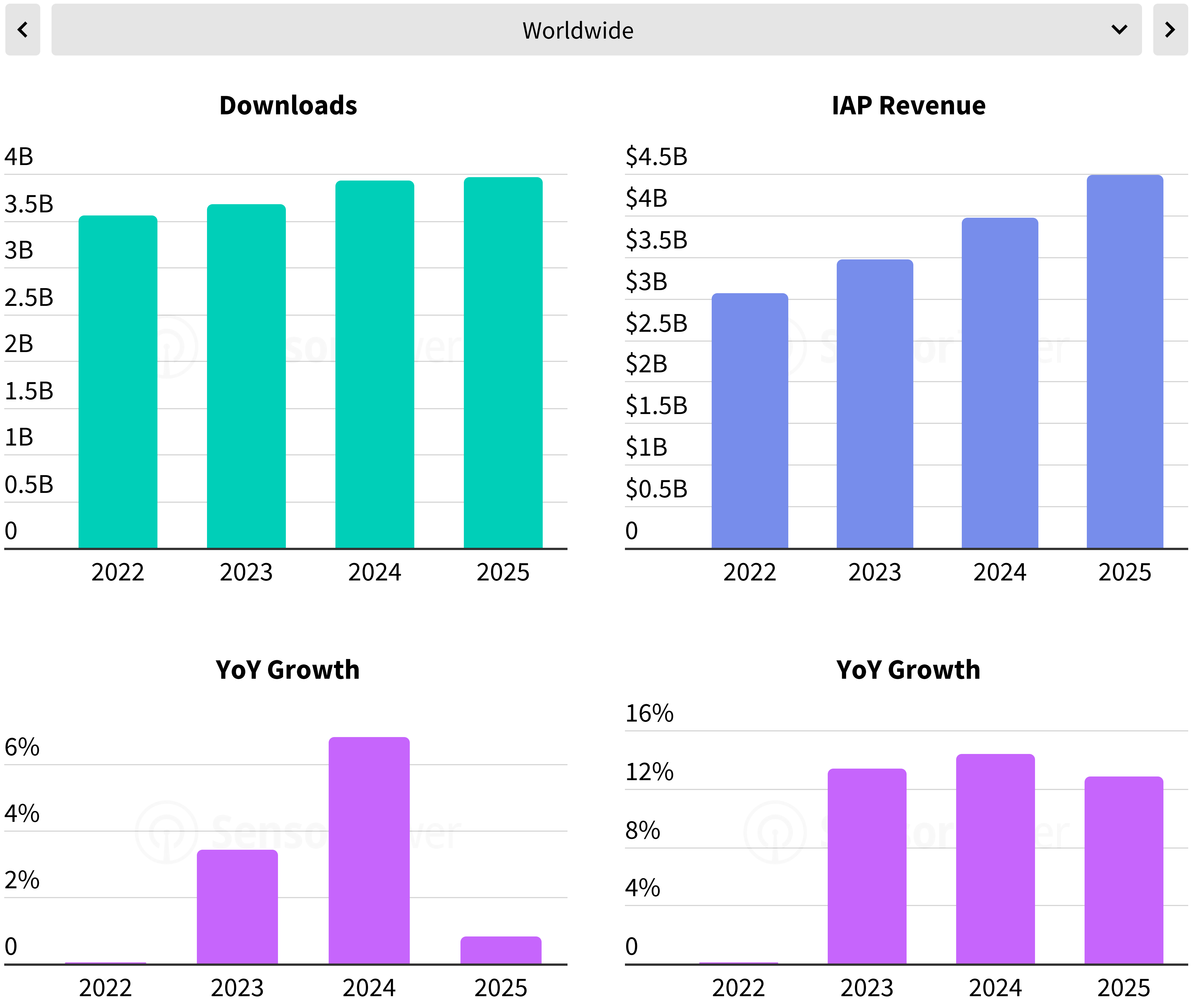
Health & Wellness Had a Strong Year on Mobile, Buoyed by AI

Health & Wellness apps reached record highs in 2025, with IAP revenue climbing 13% YoY to $4.5 billion and downloads edging up to 3.96 billion. As market leaders experiment with generative AI to enhance personalization and outcomes, the category still offers meaningful growth opportunities for publishers that successfully use AI to deliver clearer value and better user experiences.

Outdoor exercise apps delivered another standout year. Running and cycling platforms such as Strava and Runna (acquired by Strava in 2025), alongside AllTrails, komoot, and onX Hunt, ranked among the top apps by IAP revenue growth. AI-powered nutrition and tracking apps—including Cal AI, MacroFactor, and YAZIO—also emerged as top global revenue growth leaders, underscoring AI's expanding role across fitness and wellness use cases.

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

Yearly Trends for Health & Fitness Apps



Mobile Health & Fitness Enters Its Next Phase

The first half of the decade has been turbulent for Health & Wellness apps. In 2020, demand surged as consumers turned to mobile solutions for safe exercise and healthcare during the pandemic. By 2024, the market began to normalize as pent-up demand for in-person experiences pulled some engagement offline, with users shifting toward social fitness and broader health tracking.

In 2025, AI emerged as the next major inflection point for the category. Nutrition and diet apps were among the earliest adopters of generative AI, introducing features such as photo-based food logging and smarter meal insights. Fitness and medical apps are now following suit, experimenting with new AI-driven capabilities to improve personalization, guidance, and overall user experience.

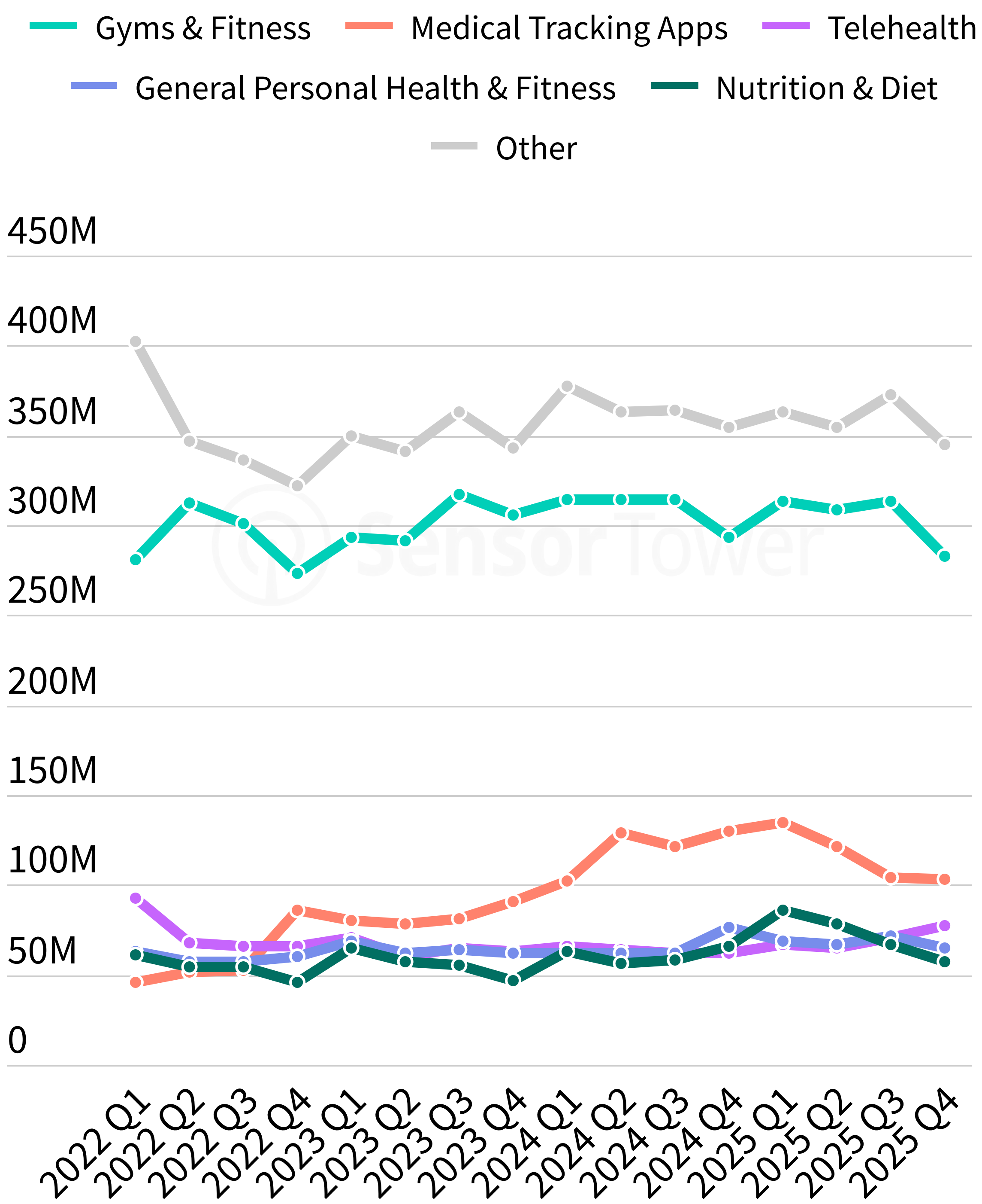
AI is Coming to Food & Drink Apps

AI features are becoming a "must-have" for top Nutrition & Diet apps. Find out how this trend is spreading across mobile verticals in our State of AI Apps 2025 Report.

Health & Fitness Download Trends by Subgenre

Worldwide

Quarterly Downloads by Subgenre



Top Apps by Downloads in 2025

	App	Subgenre
1	Flo	Period Tracking
2	Strava	Gyms & Fitness
3	Mi Fitness	Gyms & Fitness
4	Step Counter - Pedometer	Gyms & Fitness
5	Home Workout - No Equipment	Gyms & Fitness
6	Sweatcoin	Gyms & Fitness
7	fitpro	Gyms & Fitness
8	Da Fit	Gyms & Fitness
9	Mobile JKN	National Medical Service
10	HryFine	Gyms & Fitness

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

Nutrition & Diet Apps' AI Keyword Adoption in Apple Search Ads

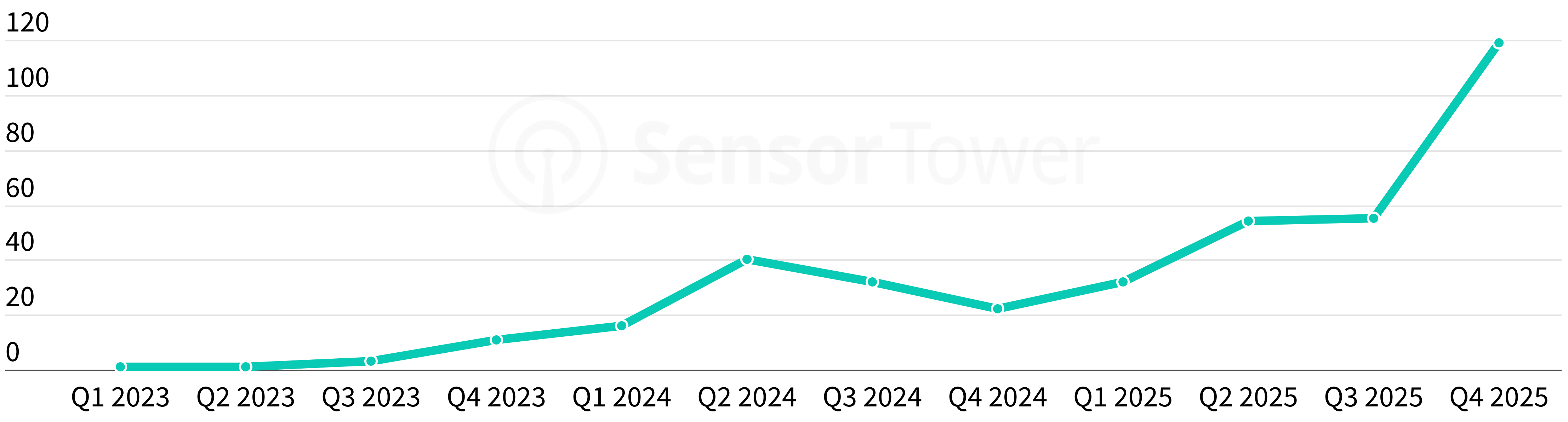
To capture the high-growth segment of tech-savvy users, top nutrition and diet apps are increasingly pivoting to AI-centric search strategies. By Q4 2025, more than a quarter (28%) of these apps were actively bidding on AI keywords, an increase of 9 ppts YoY.

Cal AI leads this trend, utilizing an average of 35 unique AI keywords per quarter throughout 2025. This strategy has effectively captured users actively looking for AI tools and converted them into new downloads. Its downloads driven by AI-related search terms (such as 'ai calorie tracker' and 'ai food tracker,' excluding branded searches for the app's own name) accounted for 25% of Cal AI's total search-based downloads.

Master Your Search Ad Strategy
Use Sensor Tower's App Store Optimization tools to identify high-traffic keywords and see which terms are driving downloads for your competitors.

Source: Sensor Tower
Note: AI keywords refer to terms that explicitly include "AI." The analysis is limited to the top 100 Nutrition & Diet apps.

AI Keyword Adoption in Apple Search Ads: Analysis of Top 100 Nutrition Apps
in the United States



Top Nutrition & Diet Apps
by Number of AI Keywords in 2025

	App	Avg AI Keywords per Quarter
1	Cal AI	34.5
2	Appediet	27.8
3	Pro Cal	14.0
4	Eato	13.3
5	MyFitnessPal	13.0
6	CalDiet	12.8
7	Lifesum	7.8
8	BitePal	6.8
9	Lose It!	5.5
10	ParrotPal	4.3

Top AI Keywords Used
by Nutrition & Diet Apps

2025 Rankings by Market | Health & Fitness

AMER - Downloads

	Worldwide	United States	Canada	Mexico	Brazil	Argentina
1	Flo	MyChart	Yuka	IMSS Digital	Meu SUS Digital	Mi PAMI
2	Strava	Planet Fitness	Finch	Flo	Strava	fitpro
3	Mi Fitness	Yuka	Strava	Farmacias del Ahorro	Flo	Flo
4	Step Counter - Pedometer	CVS Health	AllTrails	Da Fit	Drogasil	Fitia
5	Home Workout - No Equipment	Finch	Flo	Period Calendar Period Tracker	Wellhub	BetterMe
6	Sweatcoin	Flo	MyFitnessPal	fitpro	GymRats	Period Calendar Period Tracker
7						

Download data

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

11

Sports

Sports apps saw record-high downloads in 2025, driven by betting, streaming, and fantasy platforms. New markets, alternative formats like Pick’em, and prediction market apps are reshaping how fans engage and spend.

UNDERDOG

SETANTA SPORTS

Sports App Downloads Grow While IAP Revenue Retreats

In 2025, global Sports app downloads surged to near 1.2 billion (+12% YoY), surpassing the 2023 peak and signaling record-high fan engagement. However, total IAP revenue fell to $1.4 billion (-14% YoY), reflecting challenges in the Sports Streaming market in particular.

The United States remains the dominant market, capturing 55% of global spend, despite facing a sharp 18% YoY revenue decline. This downturn was primarily fueled by the Sports Streaming subgenre, where US IAP revenue crashed by 40%. This decline is attributed to extreme market fragmentation as general streaming giants like HBO Max, Amazon Prime Video, Tubi, and Paramount+ aggressively expanded their live sports catalogs. Additionally, bundle promotions, such as ESPN+ being increasingly billed through multi-app packages like the Disney Bundle, have further diluted the direct revenue of standalone sports platforms.

Which Exclusive Live Sports Boost Streaming?
Sensor Tower's Mobile App Insights lets you see how the biggest sports events boosts streaming service adoption and engagement, while Pathmatics digital advertising data lets you see the ad strategies on top streaming services in the US like Hulu, Peacock, and Pluto TV.

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

Yearly Trends for Sports Apps

Sports Betting Takes Off in Its Newest Market: Brazil

Sports News, Statistics and Live Scores remained the market leader in terms of global downloads in 2025, followed by Sports Streaming. However, Sportsbook & Casino has emerged as the year's primary growth catalyst, with global downloads surging 34% YoY. This expansion is increasingly global, as evolving regulatory landscapes drive record adoption in new markets like Brazil (which officially launched regulated online gambling in 2025).

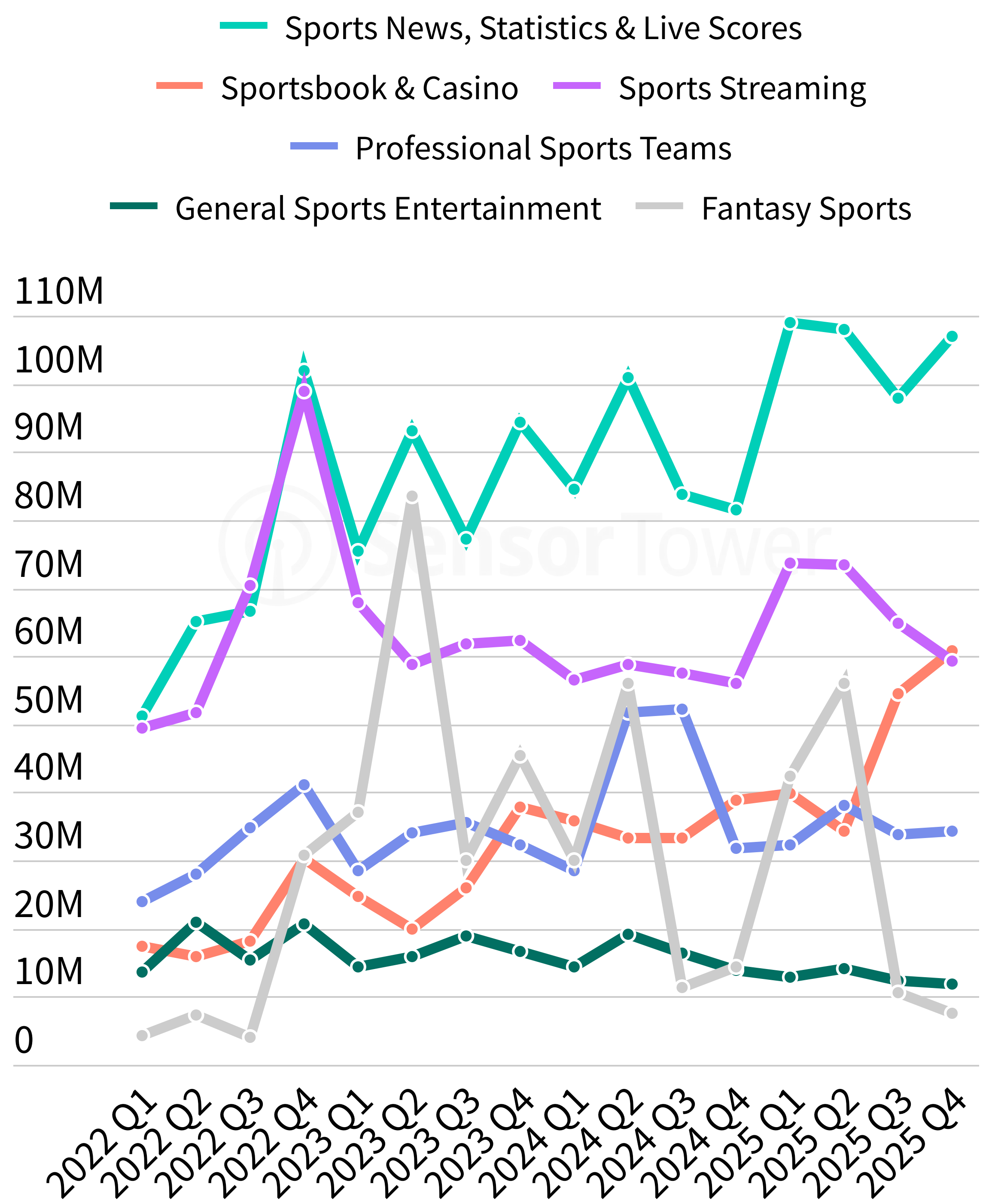
In US, the sports betting market has entered a phase of stabilization following years of rapid post-legalization growth. Total downloads for Sportsbook & Casino apps in the US moderated with a 6% YoY decline in 2025. Despite this cooling in new user acquisition, the sector remains intensely competitive, with a 13% YoY increase in total time spent, indicating that established players are successfully deepening engagement with their existing user base.

Which Apps Won the NFL Season in 2025?
Read our latest sports report — The 2025 NFL Season by the Numbers — covering the latest sports trends in the US from Sports Betting to Fantasy Sports.

Sports Download Trends by Subgenre

Worldwide

Quarterly Downloads by Subgenre



Top Apps by Downloads in 2025

	App	Subgenre
1	Dream11	Fantasy Sports
2	DAZN	Sports Streaming
3	BeSoccer	Sports News, Statistics & Live Scores
4	My11Circle	Fantasy Sports
5	Flashscore	Sports News, Statistics & Live Scores
6	Sofascore	Sports News, Statistics & Live Scores
7	CREX	Sports News, Statistics & Live Scores
8	Cricbuzz	Sports Streaming
9	MatchLive	Sports News, Statistics & Live Scores
10	ESPN	Sports Streaming

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

Sports

The Rise of Pick'em: Bypassing Barriers to Capture US Betting

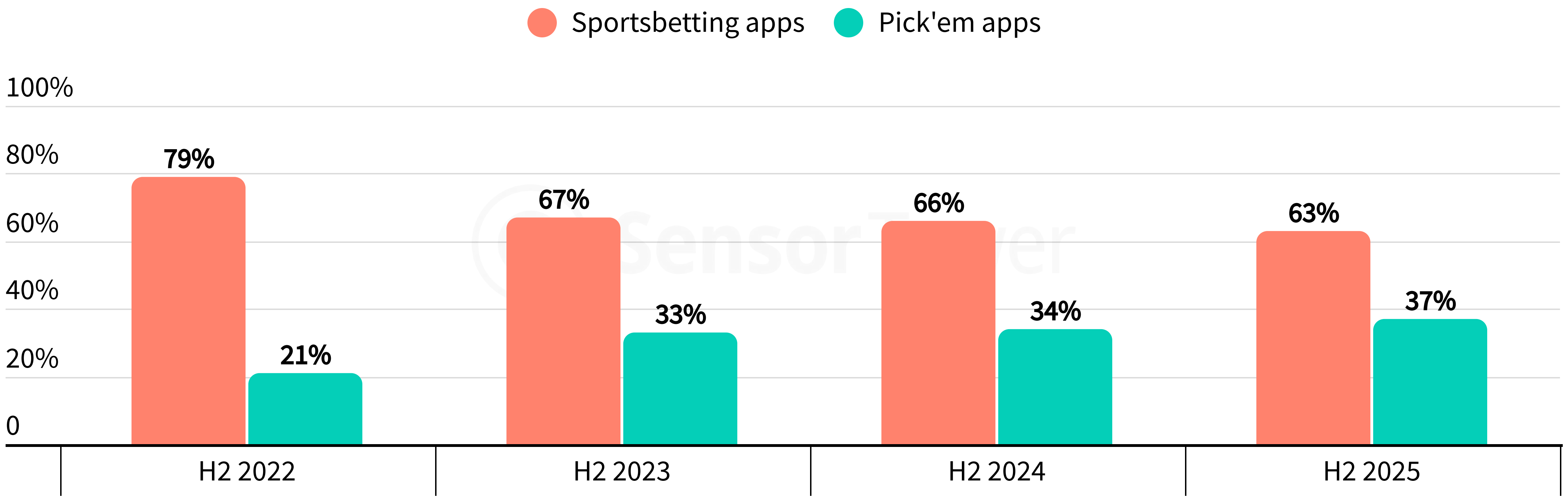
Pick'em apps are aggressively capturing market share from sports betting industry leaders. As of H2 2025, the MAU share for traditional sports betting apps has fallen to 63%, a sharp 16 ppts decrease from H2 2022. While established giants like FanDuel (-17% YoY), DraftKings (-15% YoY), and BetMGM (-33% YoY) experienced double-digit declines in downloads in 2025, the Pick'em sector was highlighted by Underdog's massive 39% YoY increase and Sleeper's 15% rise.

Due to regulatory restrictions in massive markets like California, Texas, and Georgia, FanDuel and DraftKings have concentrated their ad spend on states where online sports betting is fully legal, such as New York and Illinois. In contrast, PrizePicks, Underdog, and Sleeper utilize their "Pick'em" model—often categorized as Daily Fantasy Sports (DFS)—to bypass these hurdles. By aggressively targeting non-legalized betting states, these platforms are capturing massive audiences that traditional sportsbooks cannot legally reach.

Dig Deeper with State and Metro Level Data

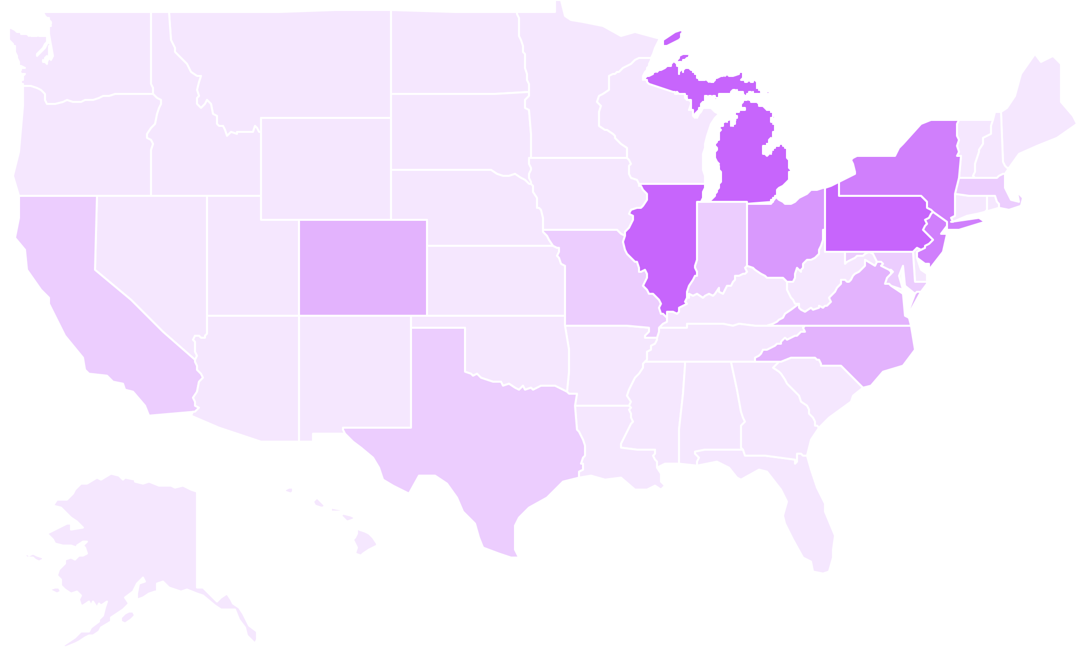
Pathmatics gives you additional granularity, allowing you to see digital ad spend by state or metro across markets. And metro usage is now available as part of Mobile App Insights, allowing you to track active users in top metros in 20+ markets.

% Share of US MAUs by Cohort



FanDuel Sportsbook & Casino

Share of Ad Impressions by State



Rank	Metro	Share of Active Users
1	New York	24.8%
2	Chicago	16.3%
3	Detroit	12.0%
4	Philadelphia	9.4%
5	Columbus, OH	8.9%
6	Denver	7.1%
7	Cleveland-Akron-Canton	6.0%
8	Boston-Manchester	5.6%
9	Raleigh-Durham-Fayetteville	5.2%
10	Baltimore	4.7%

Source: Sensor Tower Mobile App Insights, Pathmatics Digital Avertising Insights
Note: US geography breakdown for 2025. Pick'em cohort includes PrizePicks, Underdog, Sleeper
Sportsbetting cohort includes FanDuel, DraftKings, BetMGM, bet365, Fanatics, Caesars.

Sports

Prediction Markets Provide an Alternative to Sports Betting

Prediction market apps like Kalshi and Polymarket offer an alternative to traditional sports betting, allowing users to buy futures contracts on sports outcomes as well as other real-world events, including politics. These apps experienced a surge in US downloads ahead of the 2024 presidential election. In 2025, Kalshi began experimenting in the sports betting space for the Super Bowl, and interest in prediction markets has surged by year-end.

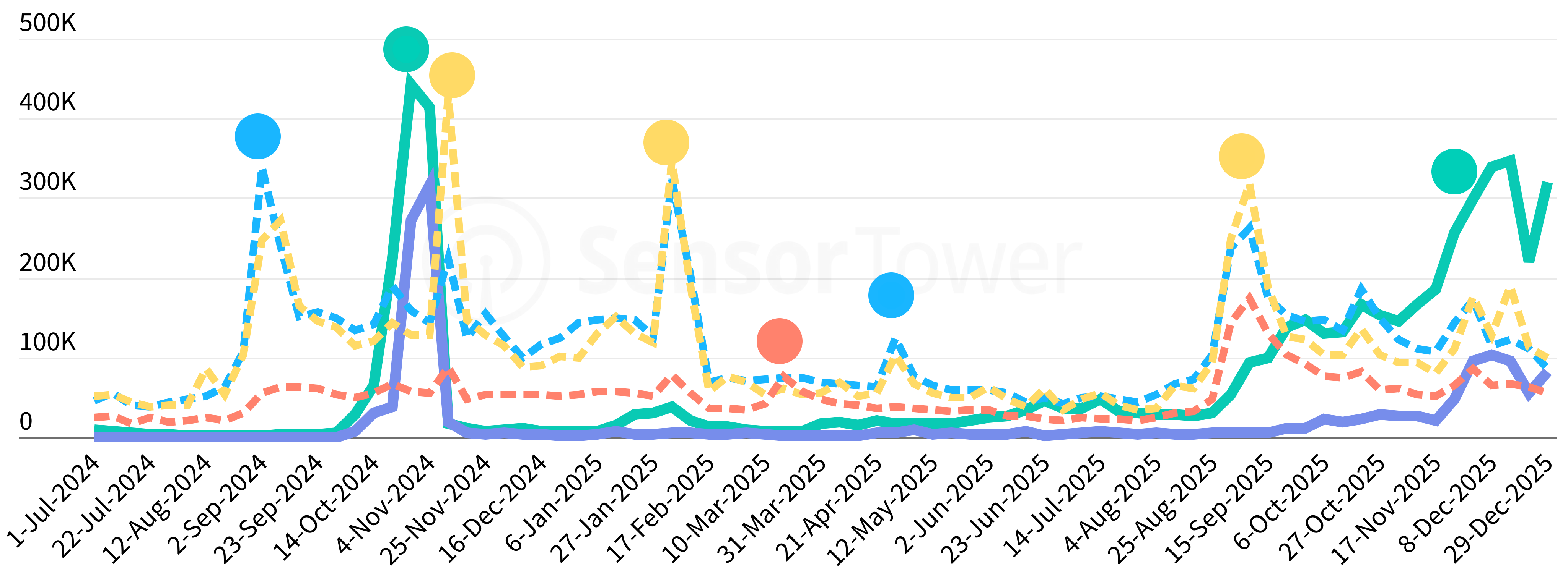
Kalshi can operate in states without fully legalized sports betting, including major markets such as California and Texas. A significant portion of its usage comes from metros in these states, including Los Angeles, Dallas–Fort Worth, and Atlanta. In contrast, traditional sportsbook apps see higher usage in metros within states that allow legal sports betting, such as New York, Chicago, and Boston.

AI-Powered Insights at Your Fingertips

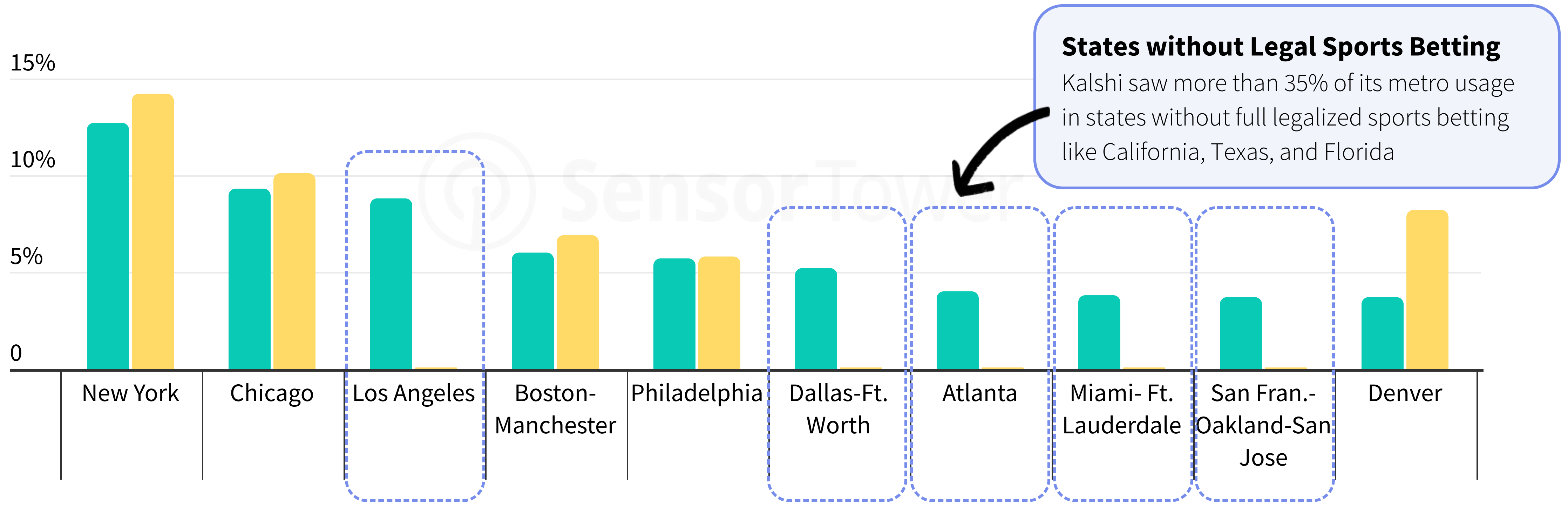
Keep an eye out for new AI features in development from Sensor Tower, like Sense AI's Spike Detection, giving insights into what caused a spike in app performance.

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

Weekly United States Downloads for Top Sportsbook and Prediction Market Apps



Kalshi's Top Metros by Share of Average WAU in December 2025



2025 Rankings by Market | Sports

AMER - Downloads

	Worldwide	United States	Canada	Mexico	Brazil	Argentina
1	Dream11	ESPN	Sportsnet	Caliente Casino	Betano	Tv argentina futbol en vivo
2	DAZN	Fubo	bet365	DAZN	Flashscore	Tv Argentina fútbol en vivo
3	BeSoccer	FanDuel Sportsbook & Casino	OLG	betmexico.mx	Betnacional	DAZN
4	My11Circle	PrizePicks	TSN	Betmaster	bet365	Errado
5	Flashscore	DraftKings Sportsbook & Casino	FanDuel Sportsbook & Casino	FOX One MX	Partidas De Hoje	ESPN
6	Sofascore	MLB Ballpark	Stake	Playdoit	Sportingbet Resultados Ao Vivo	Tv Argentina en vivo futbol
7						

Download data

Source: Sensor Tower Mobile App Insights

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

12

Top Apps and Games

See the mobile leaders by downloads, IAP revenue, and monthly active users in 2025 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

2025 Rankings by Market | Top Apps

Worldwide

Downloads				IAP Revenue				Monthly Active Users			
	App Name	Change	App Subgenre		App Name	Change	App Subgenre		App Name	Change	App Subgenre
1	ChatGPT	▲	AI Assistant	1	TikTok	=	Social Media	1	Google	=	Browsers
2	TikTok	▼	Social Media	2	Google One	▲	Cloud Storage	2	YouTube	=	Social Media
3	Instagram	▼	Social Media	3	ChatGPT	▲	AI Assistant	3	Google Chrome	=	Browsers
4	Facebook	=	Social Media	4	YouTube	▼	Social Media	4	WhatsApp Messenger	=	Social Messaging
5	WhatsApp Messenger	▼	Social Messaging	5	Disney+	▼	OTT Streaming	5	Gmail	=	Email
6	CapCut	▼	Video Editing	6	Tinder Dating App	▼	Dating	6	Google Maps	=	Navigation & Maps
7	Temu	=	General Shopping	7	HBO Max	▼	OTT Streaming	7	TikTok	▲	Social Media
8	Google Gemini	▲	AI Assistant	8	CapCut	▲	Video Editing	8	Facebook	▼	Social Media
9	Telegram	▼	Social Messaging	9	WeTV	▼	OTT Streaming	9	Google Messages	▲	Calling & SMS
10	Snapchat	=	Social Media	10	LinkedIn	▼	Other Jobs & Education	10	Instagram	▼	Social Media

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

2025 Rankings by Market | Top Games

Worldwide

	Downloads				IAP Revenue				Monthly Active Users		
	App Name	Change	Game Subgenre		App Name	Change	Game Subgenre		App Name	Change	Game Subgenre
1	Block Blast!	▲	Block	1	Last War:Survival	▲	4X Strategy	1	Roblox	=	Sandbox
2	Roblox	=	Sandbox	2	Whiteout Survival	▲	4X Strategy	2	Garena Free Fire	=	Battle Royale
3	Garena Free Fire	▼	Battle Royale	3	Royal Match	▼	Swap	3	Subway Surfers	=	Platformer / Runner
4	Subway Surfers	▼	Platformer / Runner	4	MONOPOLY GO!	▼	Coin Looters	4	Block Blast!	▲	Block
5	Pizza Ready!	=	Time Management	5	Honor of Kings	▼	MOBA	5	Candy Crush Saga	=	Classic Match 3
6	Ludo King	=	Board	6	Candy Crush Saga	=	Classic Match 3	6	Mobile Legends: Bang Bang	=	MOBA
7	Hole.io	▲	.io	7	Coin Master	▲	Coin Looters	7	Brawl Stars	▼	MOBA
8	Vita Mahjong	▲	Mahjong	8	Roblox	▼	Sandbox	8	Clash Royale	▲	Real-Time Strategy
9	EA SPORTS FC Mobile Soccer	▲	Realistic Sports	9	Game for Peace	▲	Battle Royale	9	Ludo King	▼	Board

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

2025 Rankings by Market | Top Publishers - Apps

Worldwide

DOWNLOADS

	Publisher	Change	
1	Meta Platforms (formerly Facebook, Inc.)	=	Instagram
2	Google	=	Google Gemini
3	ByteDance	=	TikTok
4	Microsoft	=	Microsoft Teams
5	OpenAI	▲	ChatGPT
6	Amazon	▼	Amazon Shopping
7	Alibaba Group	▼	Alibaba.com
8	PDD Holdings	▼	Temu
9	InShot	▲	Video Editor & Maker - InShot
10	Abishkking	▼	PDF Reader - PDF Editor

IAP REVENUE

	Publisher	Change	
1	ByteDance	=	TikTok
2	Google	=	Google One
3	OpenAI	▲	ChatGPT
4	Match Group	=	Tinder Dating App
5	Amazon	▲	Amazon Shopping
6	The Walt Disney Company	▼	Disney+
7	NetEase	▼	网易云音乐-1.8亿内容畅听
8	Warner Bros. Discovery	▼	HBO Max
9	Sony	=	Crunchyroll
10	LY Corporation	=	LINE Manga

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

2025 Rankings by Market | Top Publishers - Games

Worldwide

Downloads

	Publisher	Change	Top App
1	Azur Interactive Games	=	Worms Zone .io
2	Miniclip	▲	Subway Surfers
3	Onesoft	▼	Cookingdom
4	Voodoo	▲	Hole.io
5	SayGames	=	My Perfect Hotel
6	Supercent	▲	Pizza Ready!
7	ironSource	▼	Bridge Race
8	Outfit7 (Jinke Culture)	▼	My Talking Tom 2: Pet Game
9	BabyBus	▼	Game World: Life Story
10	Embracer Group	▲	Lamar

IAP Revenue

	Publisher	Change	Top App
1	Tencent	=	Honor of Kings
2	Scopely	=	MONOPOLY GO!
3	Century Games	▲	Whiteout Survival
4	Microsoft	▼	Candy Crush Saga
5	Dream Games	▲	Royal Match
6	Playrix	▼	Township
7	FUNFLY	▲	Last War:Survival
8	Take-Two Interactive	▼	Toon Blast
9	Supercell	▼	Clash Royale
10	Moon Active	=	Coin Master

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

Customer Testimonials

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

Michael Reicher
CBDO
Wargaming

"Historically, our company, Cybird Inc, has released new apps on a regular basis but the industry market has changed dramatically in recent years and we predict further dynamic changes in the near future. Leading into these changes, collecting and analyzing data is essential for us to make bold and reliable decisions in our strategies. This is where it becomes important to combine a "macro perspective" that captures global app store trends with a "micro perspective" that digs deeper into individual user behavior.

Sensor Tower covers this multifaceted data with extremely high accuracy, and we are confident that they will continue to be an extremely reliable partner in formulating future marketing strategies."

Tomohiko Matsuno
Executive Officer and CMO
CYBIRD Inc.

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

Fred St-Amour
Studio Director, Product and Creative
Frima

Meet the authors

Yuwen Huang
Senior Market Insights Analyst

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

Favorite App in 2025: rednote

Sam Aune
Lead Gaming Insights Analyst

Sam leads Sensor Tower's gaming analysis across mobile, web, and console. He delivers the latest games industry insights and has authored many of Sensor Tower's flagship gaming reports, including the annual State of Mobile Gaming.

Favorite App in 2025: ChatGPT
Favorite Game in 2025: Chess by Chess.com

Jonathan Briskman
Director, Market Insights

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

Favorite App in 2025: Strava

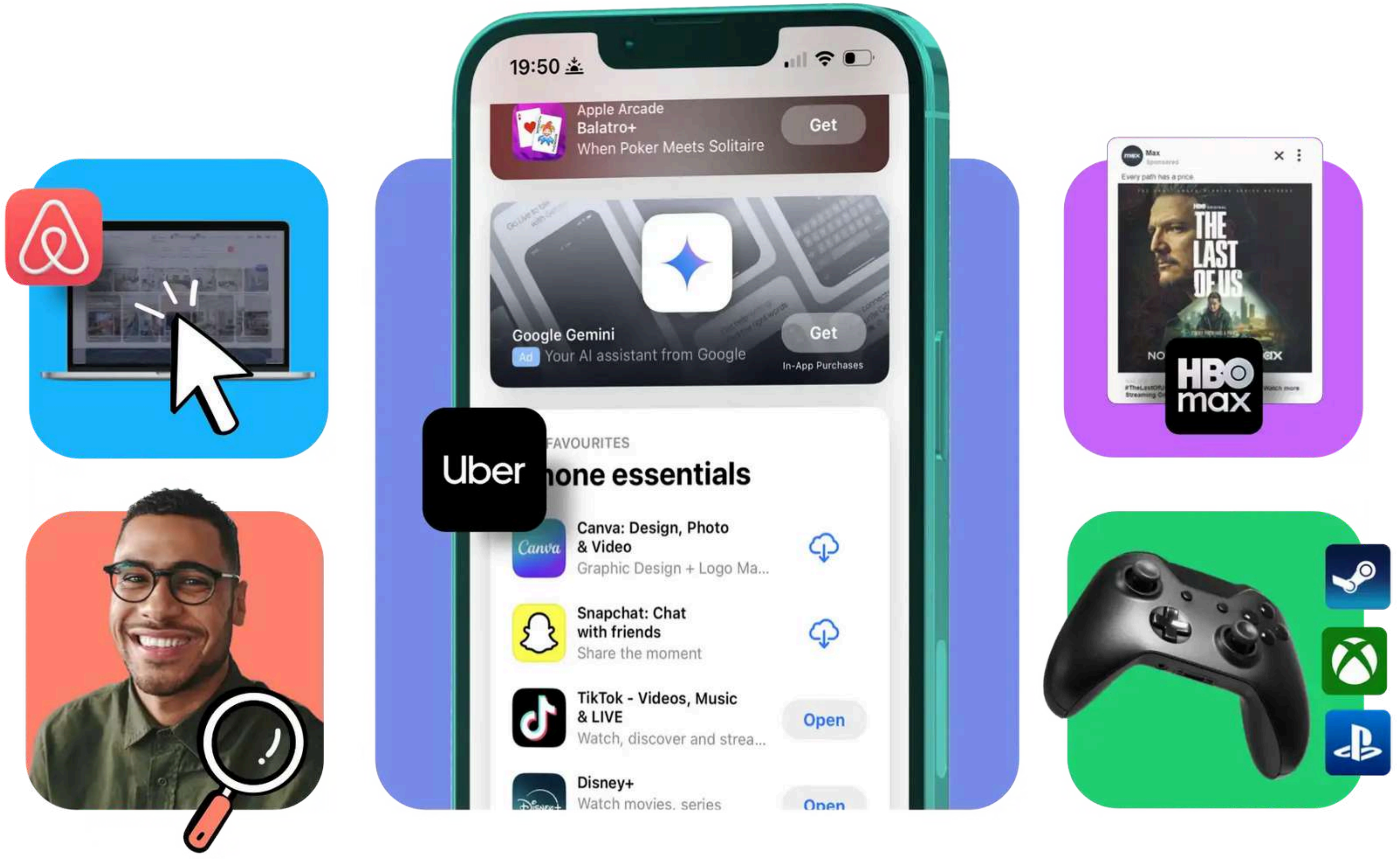
Sensor Tower

About Sensor Tower

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

For more information, visit sensortower.com.

Press Inquiries: press@sensortower.com



Sensor Tower

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