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STATE OF MOBILE 2024

The Industry's Leading Report

1 AI is Everywhere

Generative AI Chatbots and Art Generators dominated attention. But AI functionality is ubiquitous across nearly every app industry.

Learn More >

2 Social is the Battleground for $$

Consumers are shifting their spending habits. Popularized by TikTok, they are opting to spend directly in app via 'tips' to their favorite content creators, opening the door for subscriptions and IAPs.

Learn More >

3 Mobile Goes IRL

Demand for revenge travel, Swiftie and Bey-Hive fans, and live sports booms — consumers seek real life experiences... but always with their phones in tow.

Learn More >

4 Non-Gaming Apps Power Spending Rebound

Non-gaming apps underpin mobile growth. Up 11% YoY, consumers can't live without streaming, dating and User Generated Content (UGC).
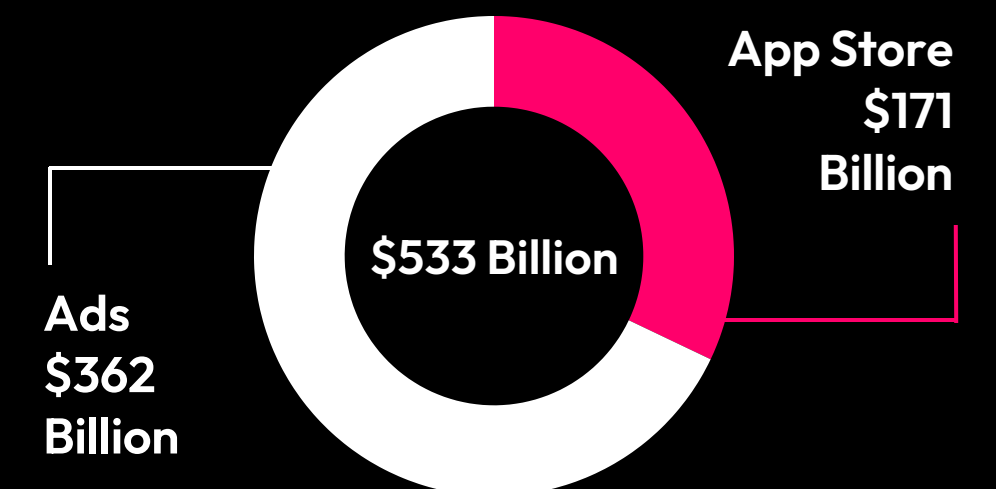
Learn More >

5 Mobile Gaming Growth Lags, But Still Leads Gaming Industry

Demand remains steady. App store spend dips slightly. Market is bolstered by new releases and APAC publishers making inroads in western markets, similar to the ecommerce sector with the rise of Temu & SHEIN.

Learn More >

Mobile Economy in 2023

App Store
$171 Billion

$533 Billion

Ads
$362 Billion

2023 Mobile Landscape at a Glance

New App Downloads	App Store Spend	Daily Time Spent Per User	Mobile Ad Spend	Total Hours Spent
257 Billion	**$171 Billion**	**5 Hours**	**$362 Billion**	**5.1 Trillion**
+1%	**+3%**	**+6%**	**+8%**	**+6%**
YoY Growth	YoY Growth	YoY Growth	YoY Growth	YoY Growth
iOS, Google Play, Third-Party Android in China	iOS, Google Play, Third-Party Android in China	Android Phones; Weighted Average Among Top 10 Mobile-First Markets		Android phones
>489,000 apps downloaded per minute in 2023	**>$325,000 spent per minute in 2023**	**1/3 of daily waking hours**	**Larger than the total economies of countries including Colombia, Finland and New Zealand**	**14 Billion hours collectively per day in 2023**

Contents
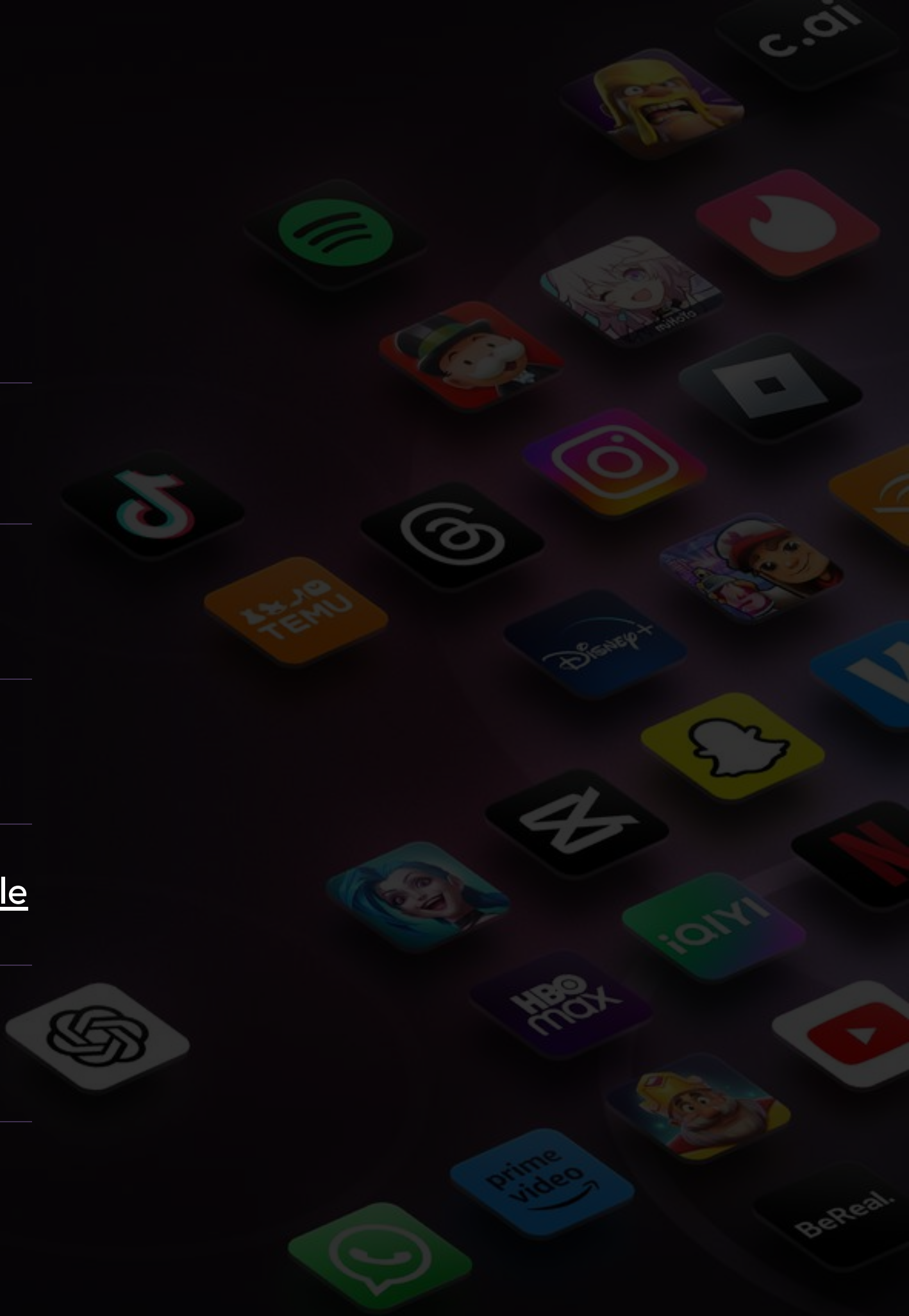
data.ai | Our Customers

80 out of the 100 top publishers trust **data.ai** insights to grow their business

Gaming	Media & Entertainment	Technology	Retail & E-commerce	Gig Economy	QSR
EA	Disney	Google	Walmart	Uber	HUNGRY JACK'S
ROVIO	kakao	amazon	macy's	DOORDASH	DQ
SEGA	SONY	Microsoft	ebay	DiDi	7 ELEVEN
OUTFiT7	ByteDance	Meta	Rakuten	Cabify	Pizza Hut
ACTIVISION	NBA	Tencent 腾讯	Alibaba	Delivery Hero	POPeYeS
	iHeart RADIO	LINE	CVS Health	deliveroo	Domino's

Note: Top publishers by app store revenue | **Source:** data.ai Intelligence

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See Your **data.ai** Powered Potential First-Hand, For Free.

Get the top mobile app performance data for over 1 million apps with **data.ai**'s **10 Day Free Trial**.

Claim your free trial with no commitment.

This report is powered by

data.ai Intelligence

App IQ & **Game IQ** Taxonomy

1.2 Million Apps Classified / 321 Subgenres Total

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Automotive 7
Books & Reference 7
Business 8
Education 10
Entertainment 12
— Music & Audio
— Other Entertainment
— Musical Instruments
— Media Player
— Video Sharing
— Live Streaming
— Short Videos
— Game Service
— Ticket Service
— Karaoke
— Radio
— OTT
Family & Relationships 3
Food & Drink 8
Lifestyle 11
News & Magazines 2
Finance 12
Photo & Video 5
Real Estate 3
Shopping 9
— E-Commerce
— Retailer Store
— Resell
— Coupons & Rewards
— BNPL
— Other Shopping
— Pharmacy & Drugstore
— Malls & Shopping Centers
— Supermarket & Convenience Store
Social Media 10
Sports 5
Travel 11
Utility & Productivity 25
Health & Fitness 10
Graphic & Design 4
Generative AI 2

Hypercasual 12
Action 16
Puzzle 19
Casino 15
Match 10
RPG 13
— Open World RPG
— Team Battle
— Tower Defense RPG
— Empire Simulation RPG
— Idle RPG
— MMORPG
— Tactics
— Action RPG
— Roguelike ARPG
— Location RPG
— Survival
— Puzzle RPG
— Other RPG
Racing 3
Shooting 6
Simulation 21
Sports 3
Strategy 10
— Auto Chess
— Build-Battle
— CCG-Battle
— Lane-Battle
— 4X March-Battle
— Summon-Battle
— Tower Defense Strategy
— Other Strategy
— Legion Battle
— Turn-Based Strategy
Party 8
Tabletop 11
Kids 9
Other 1

Top Performers by Mobile Performance Score

Mobile Performance Score is the industry's first mobile scoring system that's like a credit score, but for apps.
Get an executive overview on desktop or on the <u>Pulse iOS app</u>.

Track Trending apps by their MPS within your genre:

Top Performer for Genre: ‹ **Apps | Entertainment** ⌄ ›

Rank	App Name		Overall MPS	Weekly Change
1		Kwai	99	-
2		Max: Stream HBO, TV, & Movies	99	-
3		TikTok	99	-
4		Star+	98	+1
5		Spotify	98	-

Compare apps to see each quadrant's performance by hovering over them.
Apps may have the same MPS score, but their quadrant score may be different:

● Kwai ● Max: Stream HBO, TV, & Movies ● TikTok ● Star+ ● Spotify
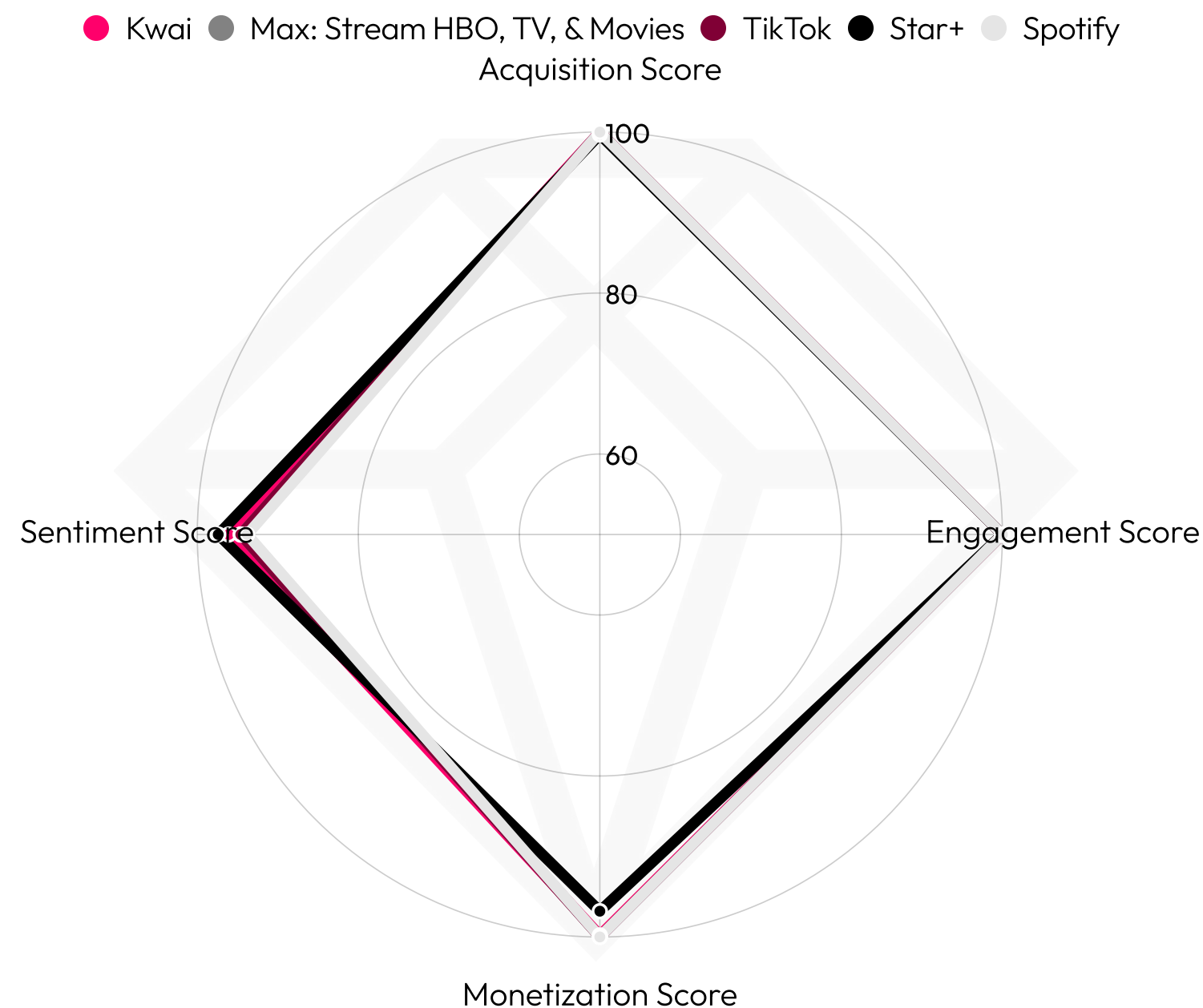
Powered by **data.ai**'s **App IQ** and **Game IQ** Taxonomy

Apps with 80+ MPS Capture More than 90% of Consumer Spend, 80% of Installs

Consumer Spend by MPS Score

| ‹ | Worldwide ⌄ | › |

100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%

Spend

● 90+ ● 80-90 ● 70-80 ● 60-70 ● 50-60

Downloads by MPS Score

| ‹ | Worldwide ⌄ | › |

100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%

Downloads

● 90+ ● 80-90 ● 70-80 ● 60-70 ● 50-60
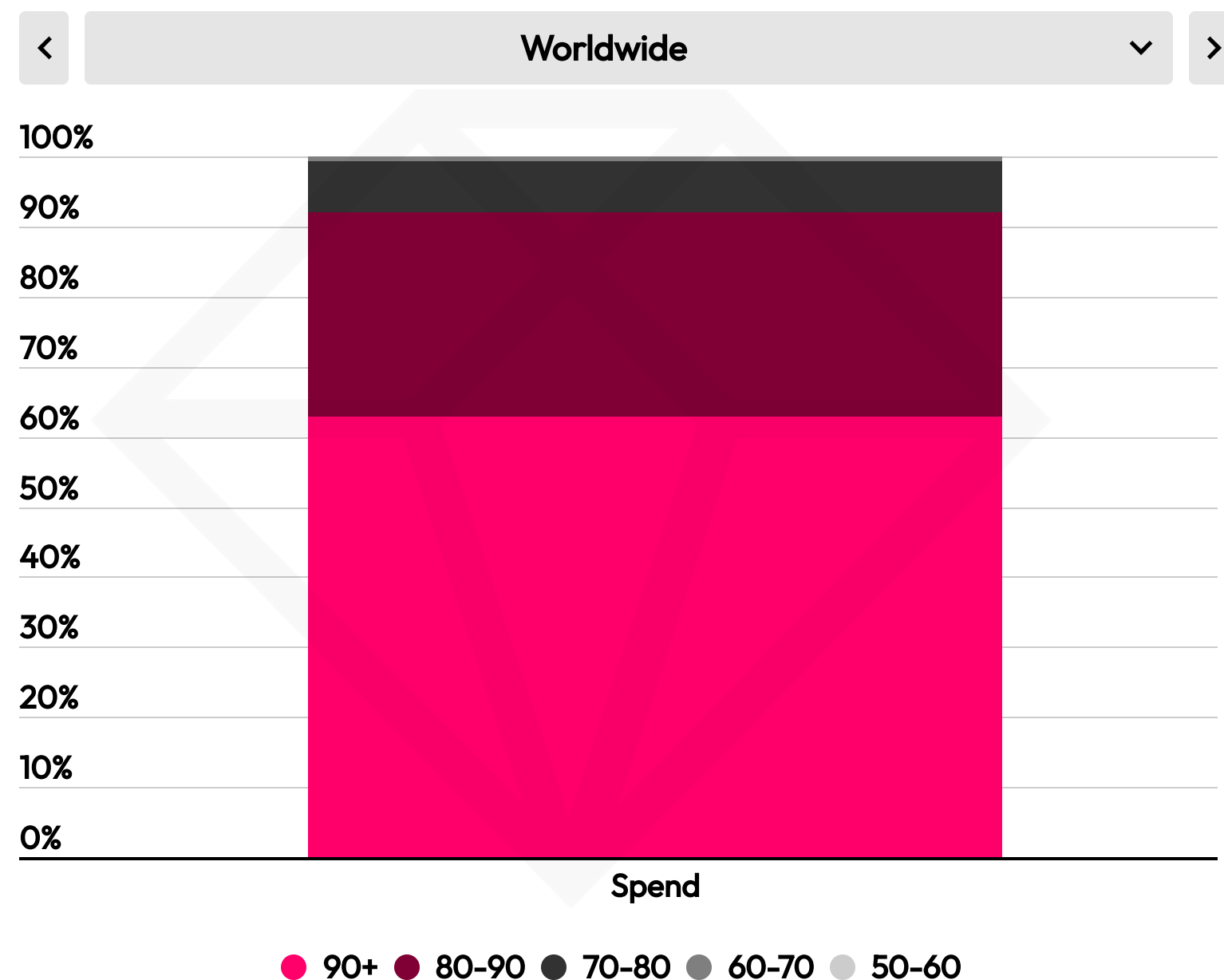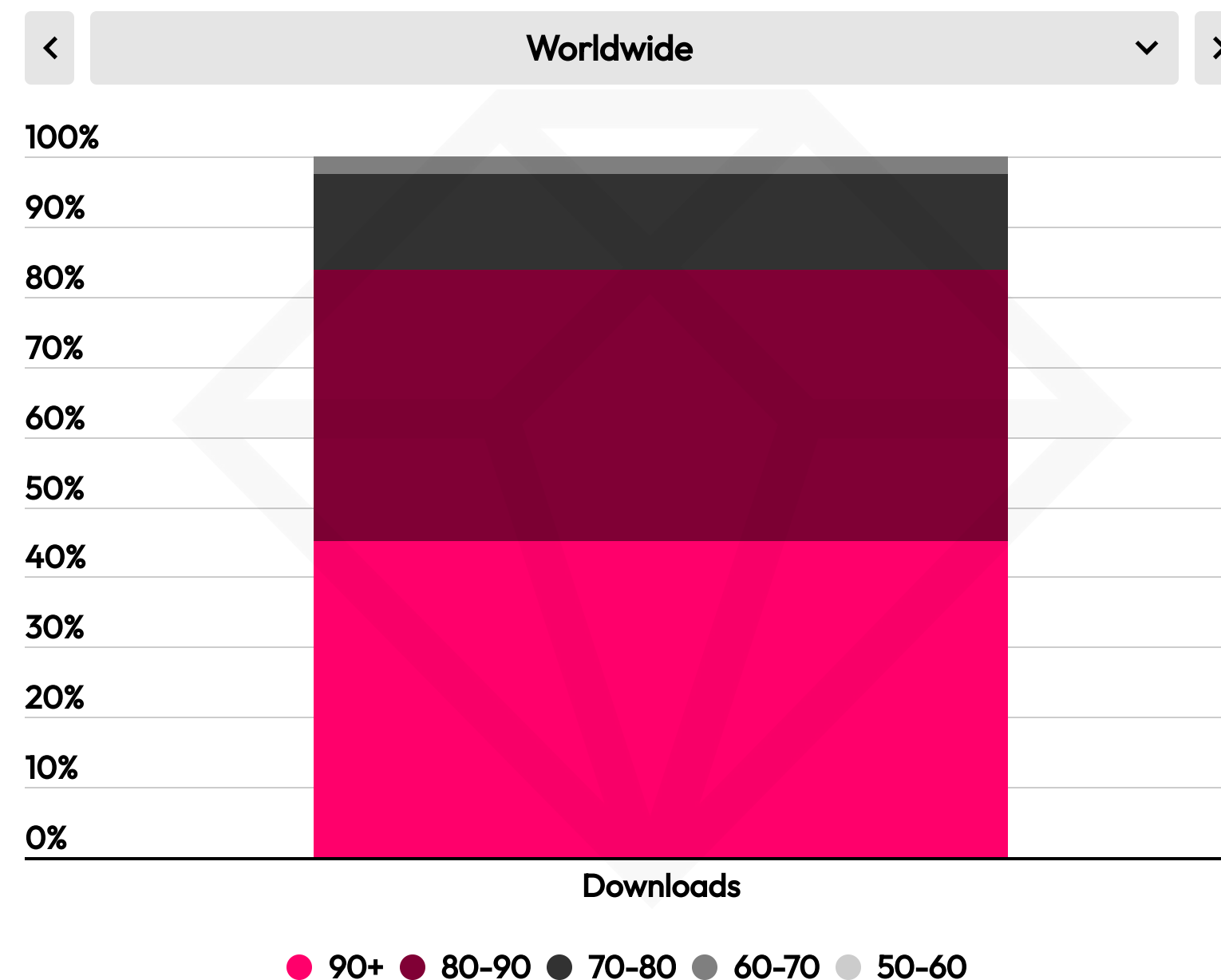
Source: data.ai Intelligence | Note: Excludes apps without a calculated Mobile Performance Score. Apps Mobile Performance Score calculated as the average weekly score in 2023 at the country / genre level.

See How Top Breakout Apps in 2023 Improved Their Scores

Global Mobile Performance Scores for Select Apps

TikTok Shop Seller Center

‹ ›

May 2023: TikTok Shop Seller Center became available in the United States, joining other markets in Southeast Asia and the United Kingdom

— Overall Score   — Acquisition Score   — Engagement Score   — Monetization Score   — Sentiment Score
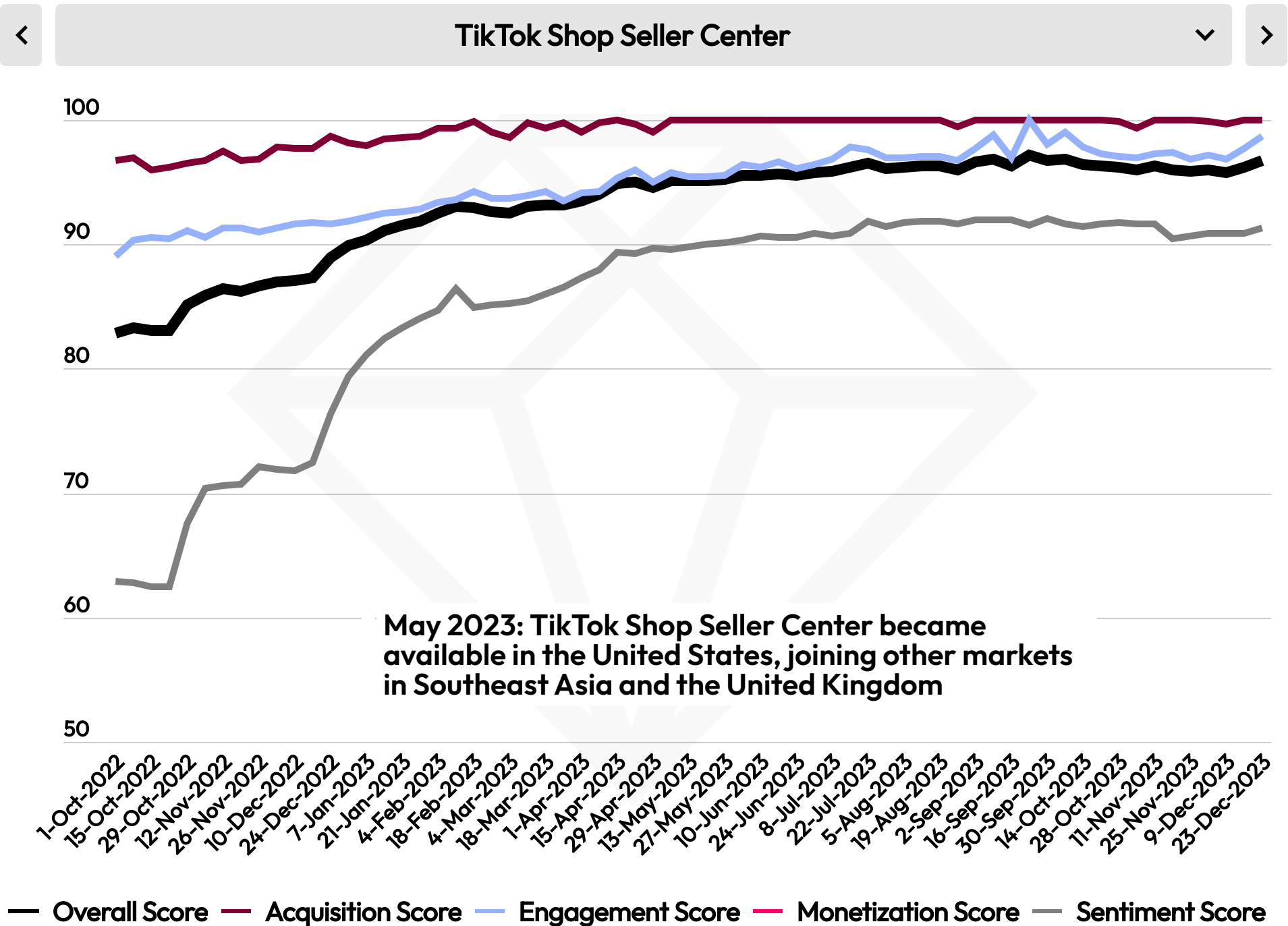
Scores the Week of December 23, 2023

97

Acquisition Score

100

80

60

Sentiment Score

Engagement Score
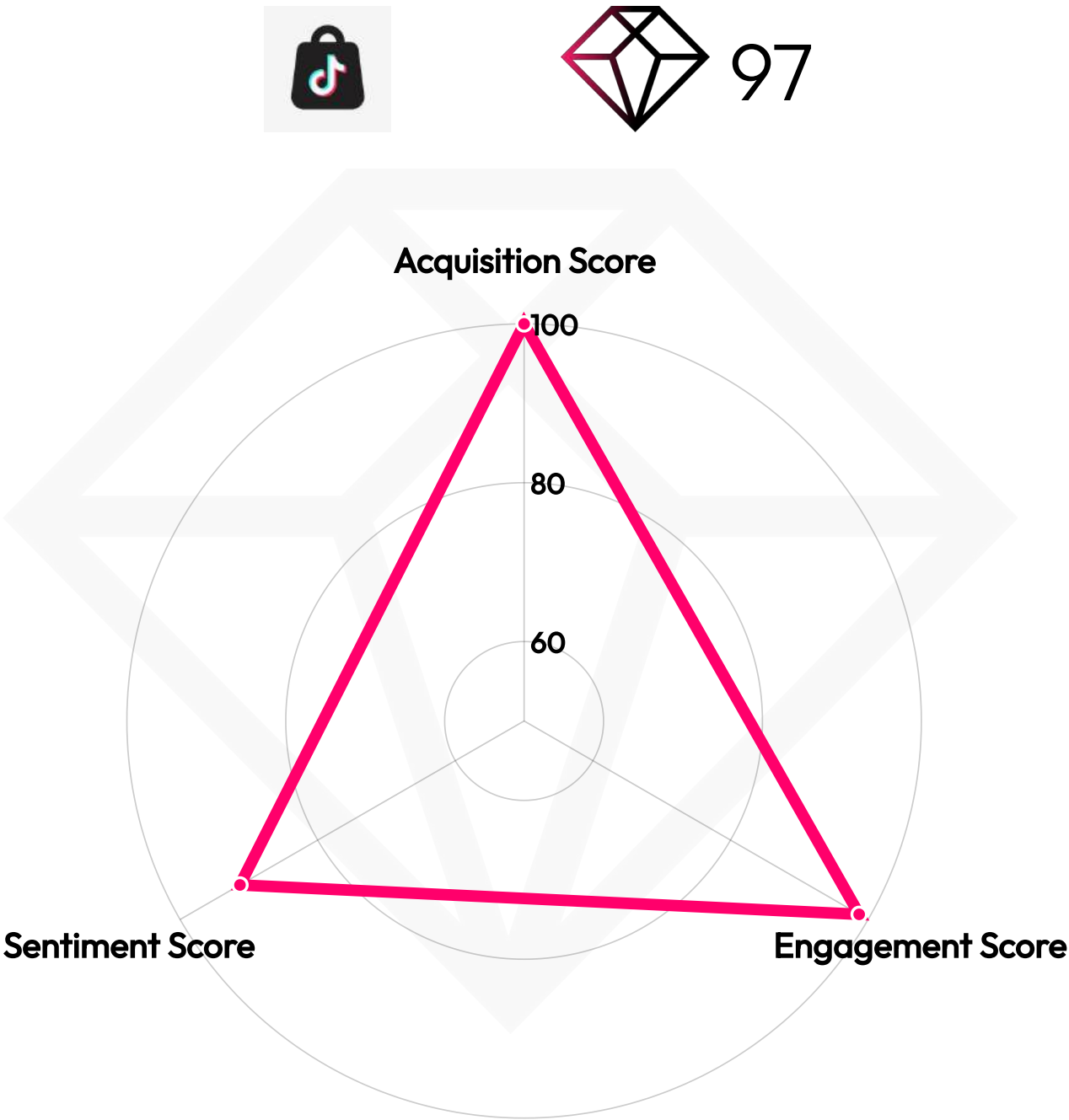
Source: data.ai Intelligence | Note: Mobile Performance Score at the genre level.

Macro Mobile Trends

A mobile-centric world: app usage at an all time high. While spend in games feels the squeeze from inflation, app services buck recessionary headwinds.

Consumers are increasingly spending more time in apps, creating new opportunities for brands to build direct relationships with customers. Marketers who invest in developing seamless app experiences and advanced app solutions are meeting consumer expectations and driving ROI for their businesses.

Mike Holtgrewe
Head of Sales, Apps

Google

# Consumers in Mobile-First Markets Spend More Than 5 Hours a Day on Mobile

Across the top 10 markets analyzed, the weighted average surpassed 5 hours in 2023 — up 6% from 2022 — to reach a new high.

Users in Indonesia surpassed 6 hours per day, while four other markets including Thailand, Argentina, Saudi Arabia, and Brazil surpassed 5 hours per day in mobile apps in 2023.

Time spent grew the fastest since 2020 in Japan, Australia and Canada at 18%, 16% and 16%.

data.ai customer?
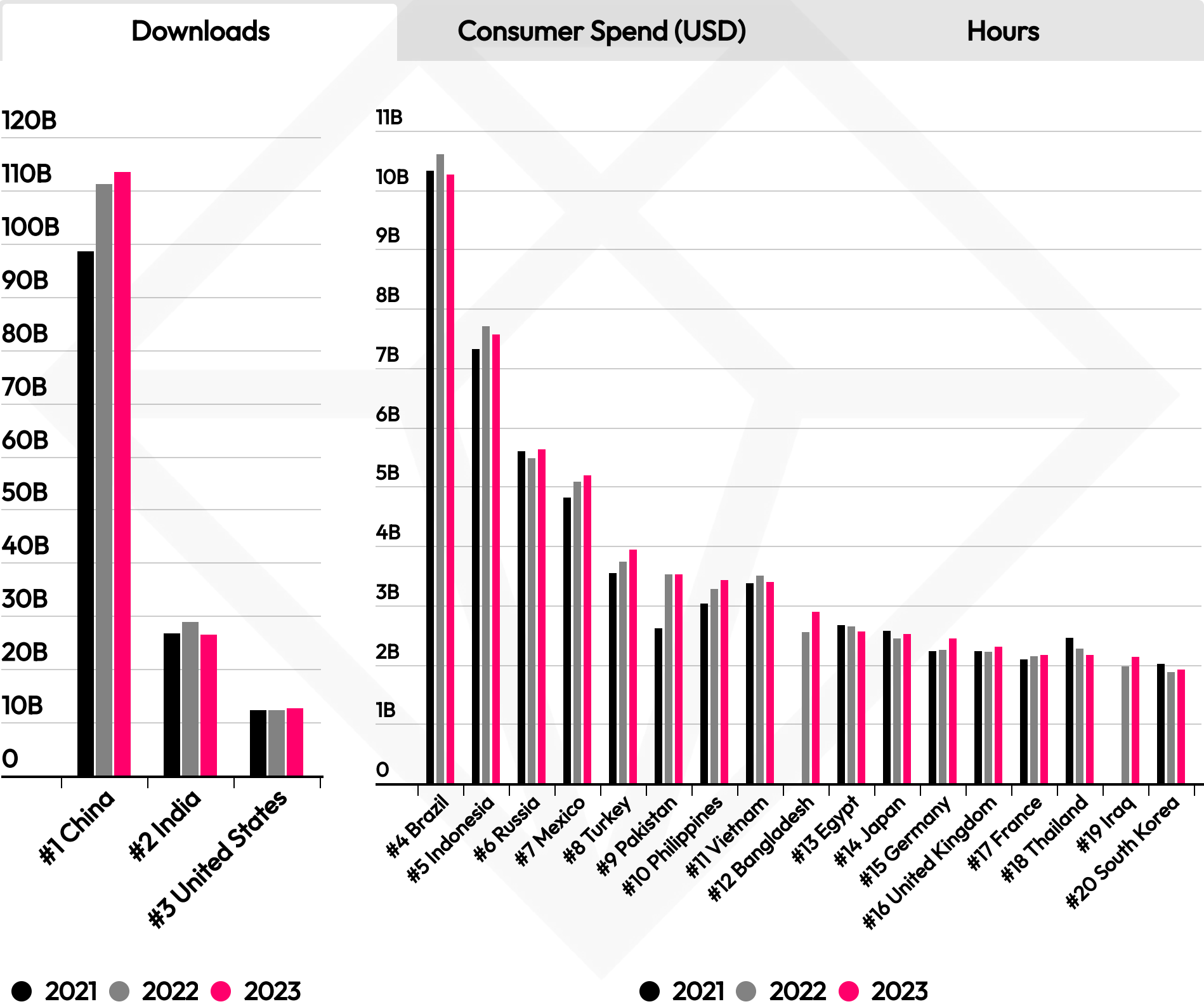View how mobile usage estimates highlight growth sectors to inform strategic roadmap and investment priorities.

Average Daily Hours Spent on Mobile Per User

● 2020 ● 2021 ● 2022 ● 2023
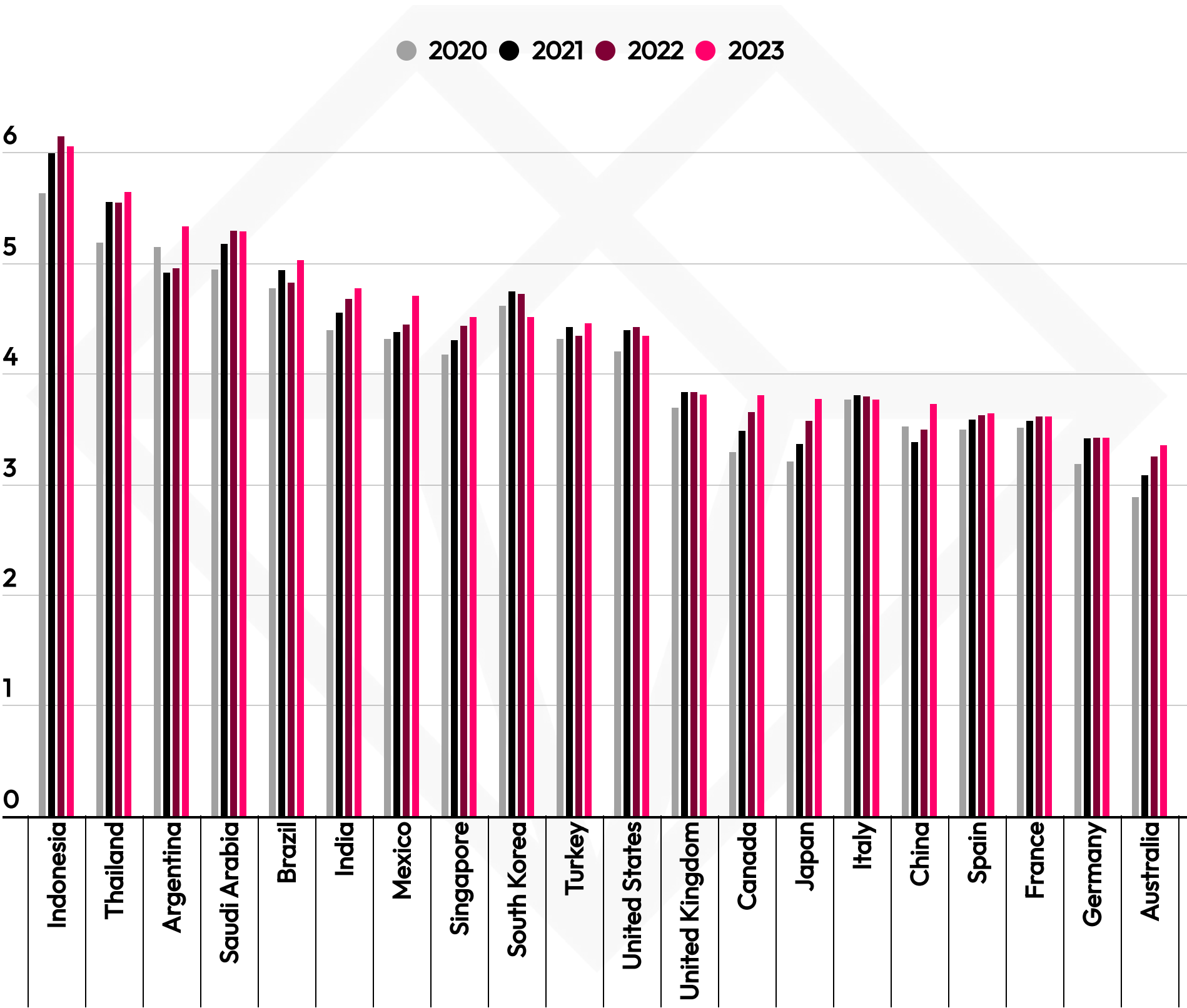
Source: data.ai Intelligence | Note: Android phones.

Top 20 Mobile Markets in 2023

| Downloads | Consumer Spend (USD) | Hours |

Downloads (Y-axis: 0 to 120B)
- #1 China
- #2 India
- #3 United States

Consumer Spend (USD) (Y-axis: 0 to 11B)
- #4 Brazil
- #5 Indonesia
- #6 Russia
- #7 Mexico
- #8 Turkey
- #9 Pakistan
- #10 Philippines
- #11 Vietnam
- #12 Bangladesh
- #13 Egypt
- #14 Japan
- #15 Germany
- #16 United Kingdom
- #17 France
- #18 Thailand
- #19 Iraq
- #20 South Korea

Legend: ● 2021 ● 2022 ● 2023

Consumer Spend Bounces Back While Time Spent Growth Continues

After declining 2% YoY in 2022, global consumer spend bounced back in 2023 up 3%. South Korea, Brazil, Mexico and Turkey all exceeded 25% YoY growth in 2023.

Meanwhile, downloads growth stalled at 1% YoY. Bangladesh has emerged as one of the fastest growing markets.

Time spent grew 10% YoY. Consumers in Pakistan (#10 by time spent), South Africa (#19) and Vietnam (#9) grew by 14%, 13% and 12% respectively.

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Size the market and keep tabs on fast-growing areas of opportunity in data.ai.

Global Mobile Ad Spend

5-YR CAGR: 16.2%

Year	Ad Spend
2019	$190B
2020	$240B
2021	$295B
2022	$336B
2023	$362B
2024F	$402B

Y-axis: $450B, $400B, $350B, $300B, $250B, $200B, $150B, $100B, $50B, 0

Year-over-Year Growth

Year	Growth
2019	22.6%
2020	26.3%
2021	22.9%
2022	14.0%
2023	7.5%
2024F	11.0%

Y-axis: 30%, 20%, 10%, 0

Source: data.ai Intelligence.

All Eyes On Mobile: Ad Spend Set to Fly Past $400B in 2024

Attention marketers: Mobile will continue to take a larger share of the advertising wallet as more time than ever before is spent in apps. Total hours will reach 5.1 trillion in 2022 on Android phones alone. Ad spend growth will bounce back a bit from the slower growth in 2023, through it will remain below the rates seen between 2019 and 2022.

Are videos the future of captivating your audience's attention? YouTube and TikTok continue to gain consumer attention and outpace to social networks by average time spent per user.
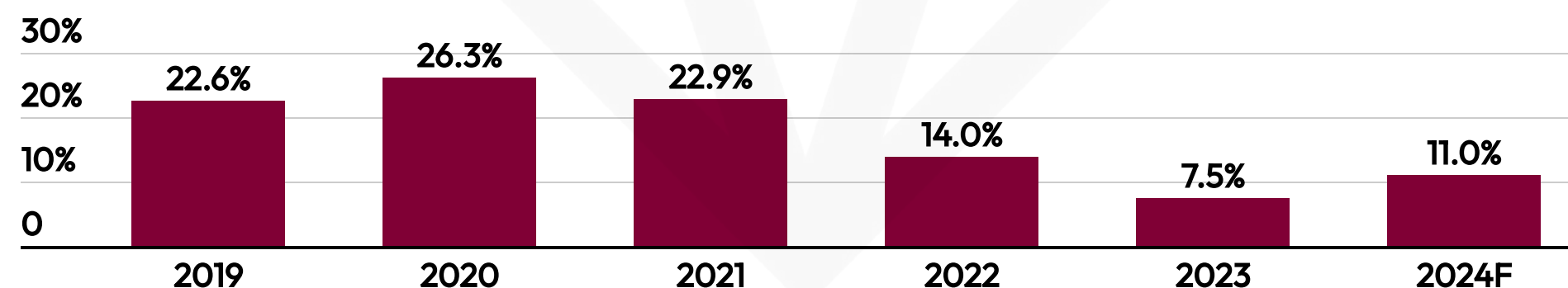
Plan with confidence:
Read our 5 Mobile App Predictions for 2024.

First Time, Then Money: App Spend Climbs During Disposable Income Squeeze as Mobile Takes a Larger Share of Wallet

Games spend is closely tied to disposable income and took a hit in 2022 and 2023 as a result. Apps — which could represent more 'need-to-have' services, prove more resilient and mirror consumer behavior more similar to how people treat their cable bills, especially as consumers become more comfortable paying on mobile.

Games Consumer Spend Growth vs Disposable Income Growth Index
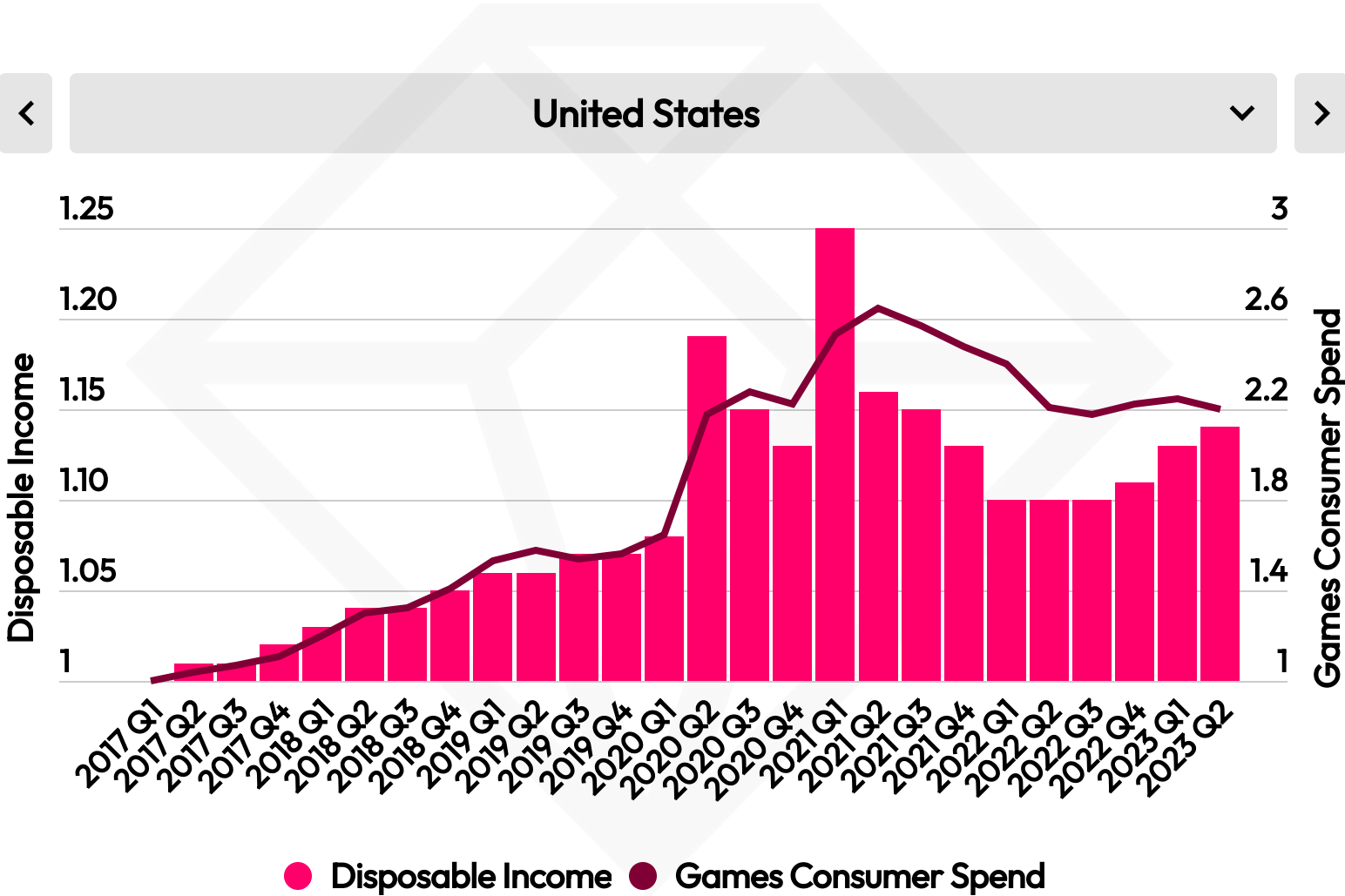
United States

- ● Disposable Income ● Games Consumer Spend

Apps Consumer Spend Growth vs Disposable Income Growth Index

United States

- ● Disposable Income ● Applications Consumer Spend
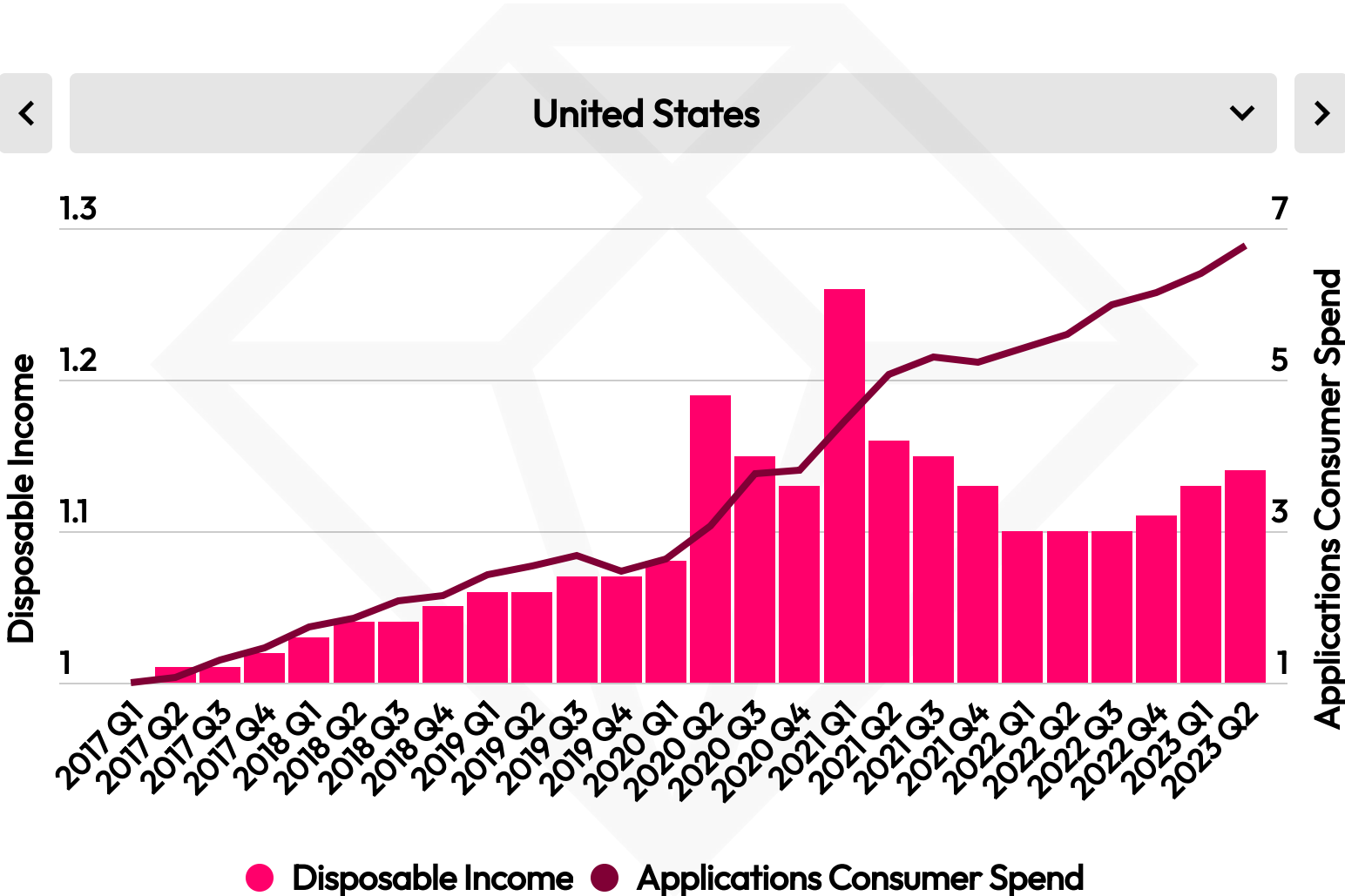
Source: data.ai Intelligence and OECD | Note: Consumer Spend across iOS, Google Play; Spend is gross — inclusive of any percent taken by the app stores. Disposable income growth and consumer spend growth are both indexed to Q1 2017. Household disposable income data from the Organisation for Economic Co-operation and Development (OECD) and available through Q2 2023.
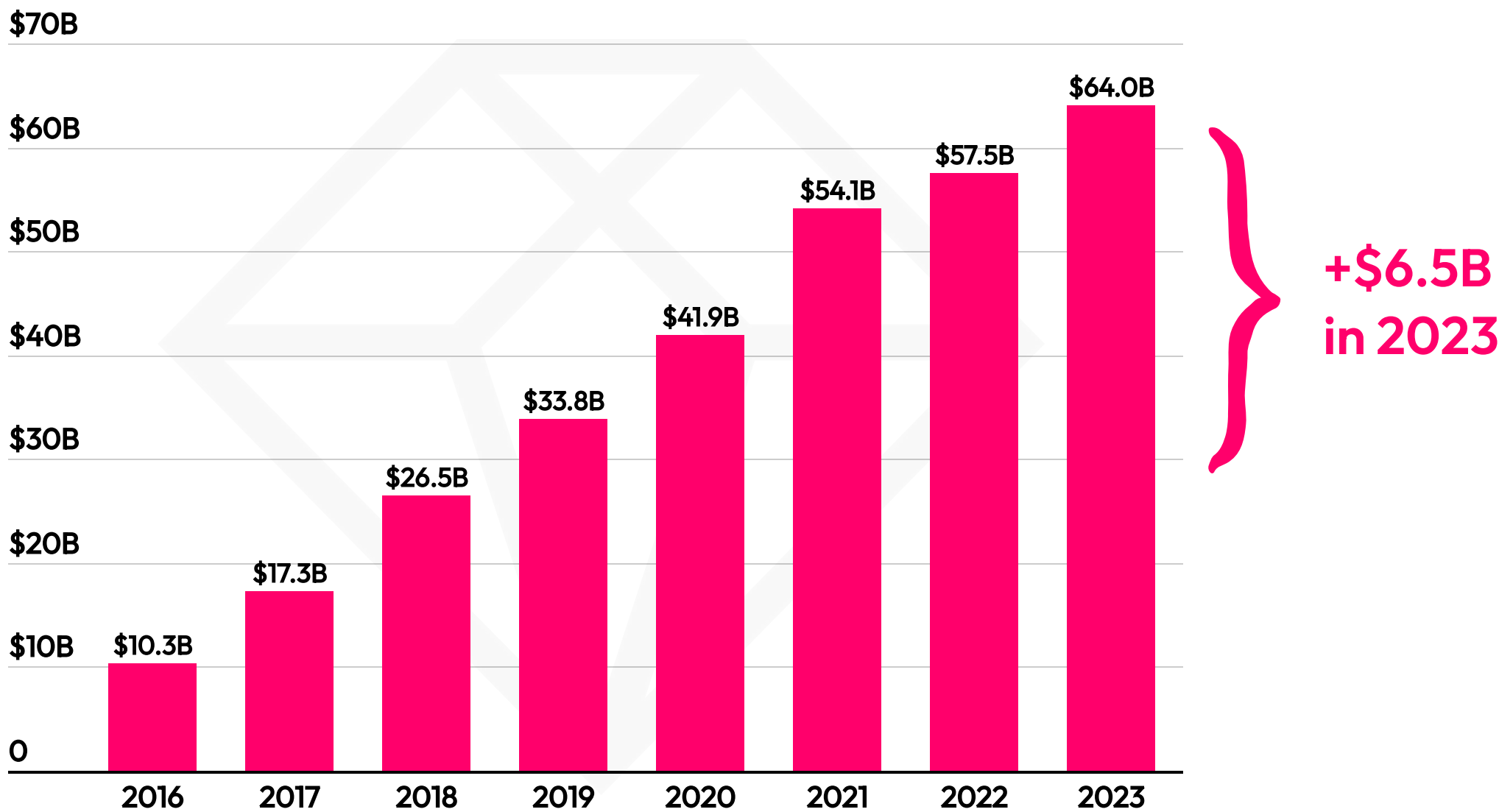
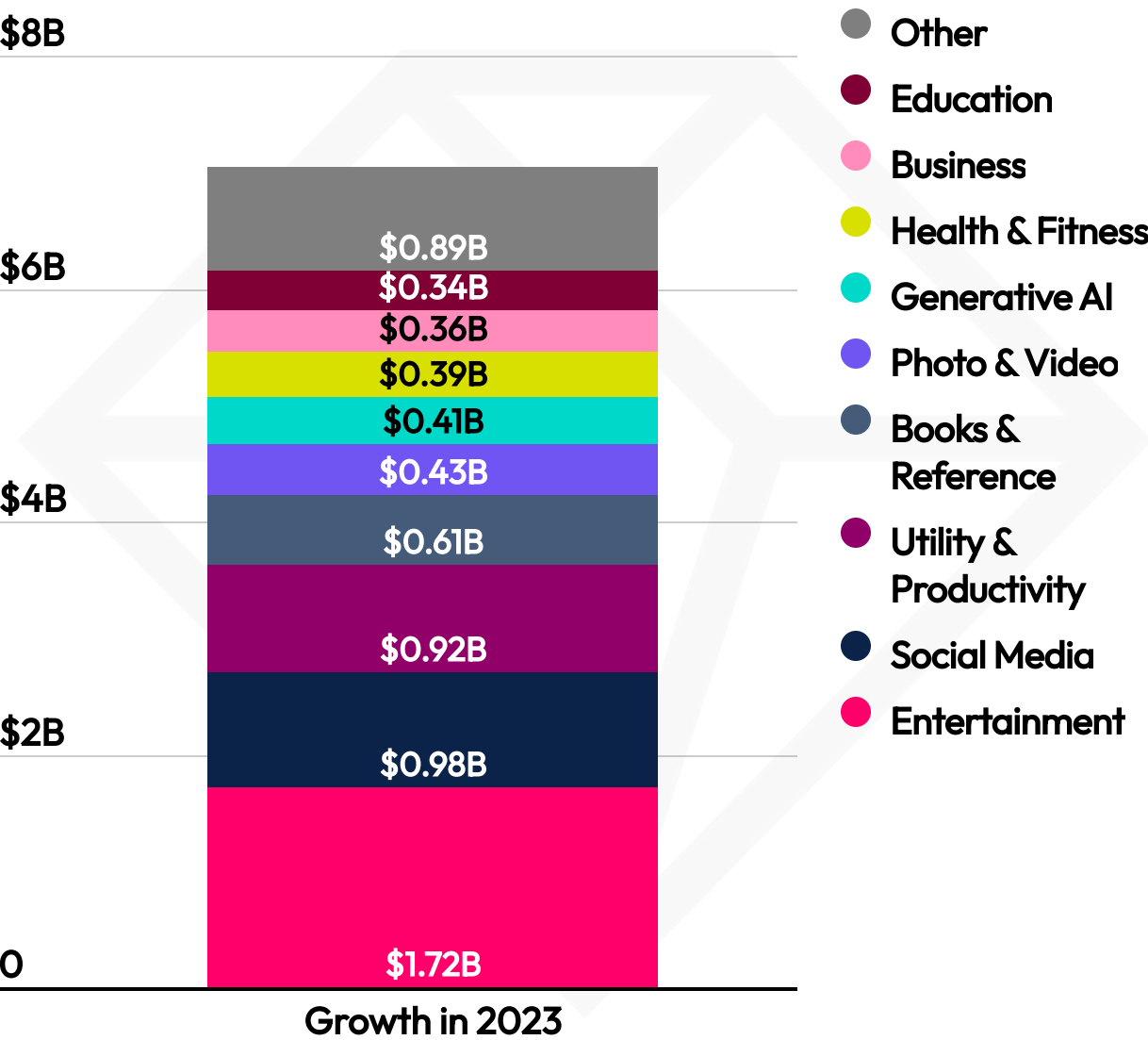# Will Consumers Soon Spend More in Apps Than Games? More Than $60 Billion Spent in Apps Excluding Games in 2023

Consumer spend outside of mobile gaming has skyrocketed during the past 10 years, climbing from less than $3 billion in 2014 to $64 billion in 2023.

What's driving the growth? Entertainment, Social Media and Utility & Productivity led the way in 2023 as every single genre grew YoY.
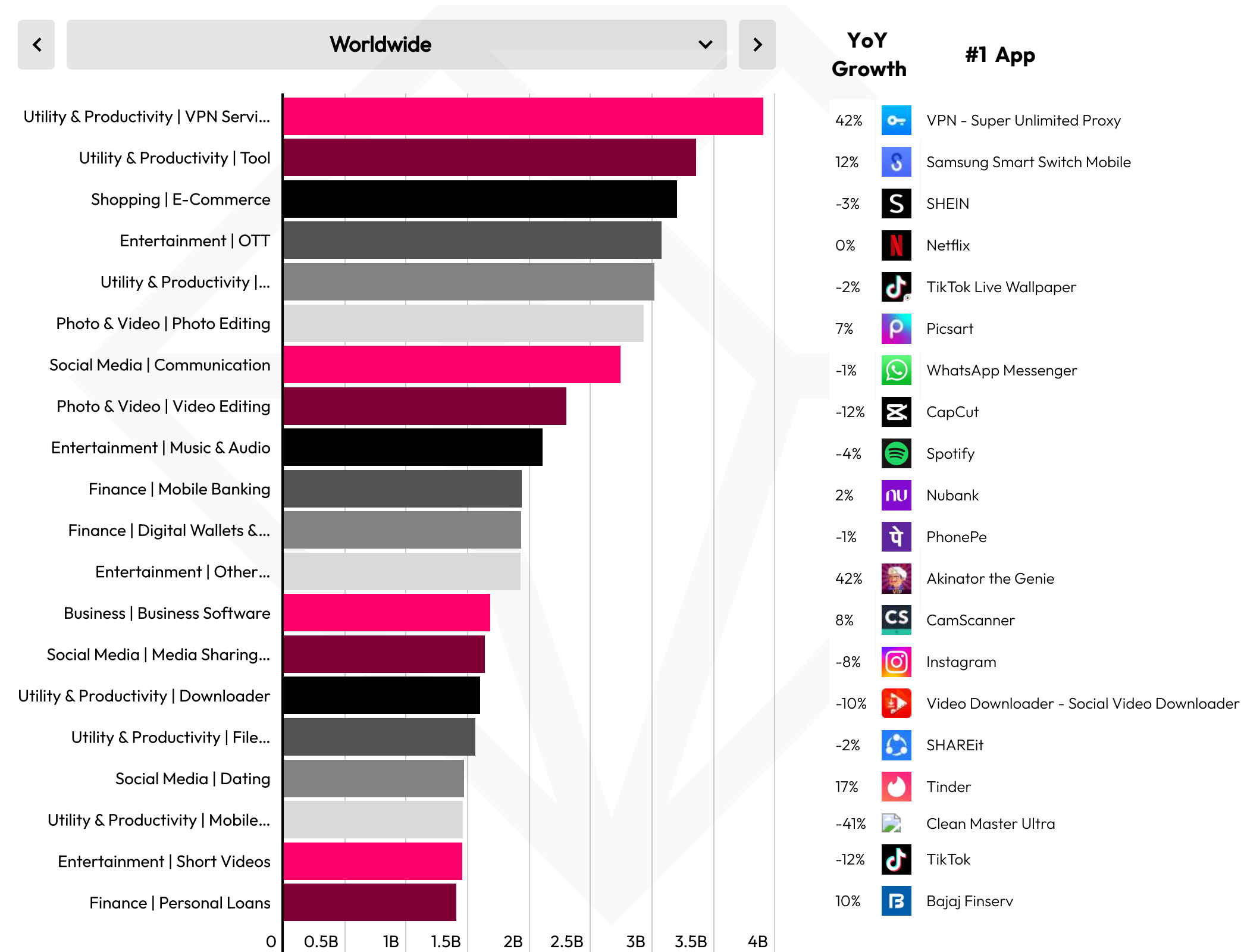
Yearly Worldwide App Consumer Spend
2014 – 2023

+$6.5B
in 2023

Worldwide Consumer Spend Growth by App Genre
iOS and Google Play only: 2023 vs. 2022

- Other — $0.89B
- Education — $0.34B
- Business — $0.36B
- Health & Fitness — $0.39B
- Generative AI — $0.41B
- Photo & Video — $0.43B
- Books & Reference — $0.61B
- Utility & Productivity — $0.92B
- Social Media — $0.98B
- Entertainment — $1.72B

Top 20 Global App Subgenres by Downloads in 2023

Subgenre	YoY Growth	#1 App
Utility & Productivity | VPN Servi...	42%	VPN – Super Unlimited Proxy
Utility & Productivity | Tool	12%	Samsung Smart Switch Mobile
Shopping | E-Commerce	-3%	SHEIN
Entertainment | OTT	0%	Netflix
Utility & Productivity |...	-2%	TikTok Live Wallpaper
Photo & Video | Photo Editing	7%	Picsart
Social Media | Communication	-1%	WhatsApp Messenger
Photo & Video | Video Editing	-12%	CapCut
Entertainment | Music & Audio	-4%	Spotify
Finance | Mobile Banking	2%	Nubank
Finance | Digital Wallets &...	-1%	PhonePe
Entertainment | Other...	42%	Akinator the Genie
Business | Business Software	8%	CamScanner
Social Media | Media Sharing...	-8%	Instagram
Utility & Productivity | Downloader	-10%	Video Downloader - Social Video Downloader
Utility & Productivity | File...	-2%	SHAREit
Social Media | Dating	17%	Tinder
Utility & Productivity | Mobile...	-41%	Clean Master Ultra
Entertainment | Short Videos	-12%	TikTok
Finance | Personal Loans	10%	Bajaj Finserv

Worldwide

Utility & Productivity Drives Downloads with a Focus on Privacy

VPN Service & Web Accelerator apps took the lead as the top subgenre with 42% year-over-year growth. This included 50% growth in top markets like India and the United States.

Outside of Utility & Productivity, E-Commerce and Over-the-Top (OTT) apps were among the market leaders. E-Commerce ranked #3 by downloads and top 10 by time spent, while OTT also led the way for consumer spend.

Navigate macroeconomic headwinds:
Spot high-growth markets on a weekly basis with a data.ai account. Drill down deeper with our App IQ taxonomy in each market.

Source: data.ai Intelligence | Note: Among non-gaming apps; Downloads and spend across iOS & Google Play and China is iOS only. Time spent is Android phones only; Spend is gross — inclusive of any percent taken by the app stores; Based on App IQ primary categorization as of Jan 4, 2024

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Top 20 Global App Subgenres by Consumer Spend in 2023

Subgenre	YoY Growth	#1 App
Entertainment | OTT	12%	Disney+
Social Media | Dating	9%	Tinder
Entertainment | Short Videos	22%	TikTok
Entertainment | Video Sharing	17%	YouTube
Books & Reference | Comics	16%	piccoma
Entertainment | Music & Audio	8%	Pandora
Utility & Productivity | File...	25%	Google One
Sports | Live Sports	19%	ESPN
Entertainment | Live Streaming	-19%	BIGO LIVE
Social Media | Communication	3%	LINE
Photo & Video | Photo Editing	24%	Picsart
Education | Language Learning	35%	Duolingo: Learn Languages
Business | Business Software	14%	Adobe Reader
Books & Reference | Fiction	19%	GoodNovel
Health & Fitness | Fitness Program	14%	Peloton
Books & Reference | Audio Books	15%	Audible
Social Media | Live Video Chat	4%	Azar
Health & Fitness | Weight Loss &...	12%	MyFitnessPal
Photo & Video | Video Editing	27%	CapCut
Utility & Productivity | Tool	25%	GoodNotes 5

Worldwide

$0 $1B $2B $3B $4B $5B $6B $7B $8B $9B

Source: data.ai Intelligence | Note: Among non-gaming apps; Downloads and spend across iOS & Google Play and China is iOS only. Time spent is Android phones only; Spend is gross — inclusive of any percent taken by the app stores; Based on App IQ primary categorization as of Jan 4, 2024

Consumers Continue to Pay for Video Streaming on Mobile

Video-based subgenres dominated the leaderboard by global consumer spend in 2023, including the top subgenre, Over-the-Top (OTT). Subgenres including Short Videos, Video Sharing and Live Sports all saw double-digit growth compared ot 2022.

Apps across the different app genres have figured out how to successfully monetize on mobile. Nine different genres were represented among the top 20 subgenres in 2023.

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See which markets are driving this growth and provide opportunities for future expansion.

Top 20 Global App Subgenres by Time Spent (Hours) in 2023

		<	Worldwide ▼	>		YoY Growth	#1 App

Bar chart showing subgenres with YoY Growth and #1 App:

Subgenre	YoY Growth	#1 App
Social Media | Communication	5%	YouTube
Entertainment | Short Videos	7%	WhatsApp Messenger
Entertainment | Video Sharing	6%	Facebook
Social Media | Social Networks	22%	TikTok
Utility & Productivity | Browser ...	0%	Chrome Browser
Social Media | Media Sharing...	35%	Instagram
Utility & Productivity |...	-3%	Samsung TouchWiz Home
Entertainment | OTT	2%	Netflix
Shopping | E-Commerce	19%	Clock by Google
News & Magazines | News	-1%	Shopee
Utility & Productivity | Tool	12%	Samsung Gallery
Utility & Productivity | Navigation	-13%	Truecaller
Graphic & Design | Gallery	5%	Google Maps
Utility & Productivity | Caller ID ...	16%	WhatsApp Business
Books & Reference | Fiction	10%	Spotify
Business | Business...	-2%	X
Entertainment | Music & Audio	3%	PLAYit
Social Media | MicroBlogging	3%	Google Drive
Utility & Productivity | File...	-10%	Gmail
Entertainment | Media Player	-2%	Wattpad

X-axis: 0, 100B, 200B, 300B, 400B, 500B, 600B, 700B, 800B, 900B

Monopoly on Time: Social Media and Entertainment

Four of the top five subgenres by time spent were in the Entertainment or Social Media genres. This is notable — the top five subgenres accounted for more than two-thirds of total time spent on mobile apps.

Media Sharing Networks had the strongest growth at 35% year-over-year with top apps including Instagram and Snapchat. Time spent for traditional Social Networks was roughly flat compared to 2022.

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Discover the market leaders in your subgenre with Top Charts.

The App Market is Resilient: Entertainment and Social Apps See Strong Growth — and Generative AI Joined the Fray in 2023

While some subgenres took a step back in 2023, this was often overshadowed by strong growth across the rest of the industry.

Downloads: App Growth 2023 YoY

< **Worldwide** ∨ >

- Utility & Productivity | VPN Service & Web Accelerator
- Generative AI | AI Chatbot
- Entertainment | Other Entertainment
- Utility & Productivity | Tool
- Social Media | MicroBlogging
- Entertainment | Short Videos
- Utility & Productivity | Translation
- Entertainment | Game Service
- Photo & Video | Video Editing
- Utility & Productivity | Mobile Cleaner & Antivirus

-0.4B　0　0.4B　0.8B　1.2B

Consumer Spend: App Growth 2023 YoY

< **Worldwide** ∨ >

- Entertainment | OTT
- Entertainment | Short Videos
- Social Media | Dating
- Utility & Productivity | File Management
- Entertainment | Video Sharing
- Social Media | Avatar-Based Social
- Entertainment | Karaoke
- Entertainment | Game Service
- Entertainment | Other Entertainment
- Entertainment | Live Streaming

0　$0.2B　$0.4B　$0.6B　$0.8B　$1B

Time Spent (Hours): App Growth 2023 YoY

< **Worldwide** ∨ >

- Entertainment | Short Videos
- Social Media | Communication
- Social Media | Media Sharing Networks
- Entertainment | Video Sharing
- Social Media | Social Networks
- Business | Meeting
- Entertainment | OTT
- Books & Reference | Fiction
- Utility & Productivity | Caller ID & Call Blocker
- Utility & Productivity | Personalization

0　20B　40B　60B　80B　100B　120B

Source: data.ai Intelligence and OECD | Note: Consumer Spend across iOS & Google Play and China is iOS only; Spend is gross — inclusive of any percent taken by the app stores. Time Spent on Android phones; Based on App IQ Taxonomy as of Jan 4, 2024.

The 2023 $1 Billion Club

More than 1,500 apps and games generated over $10 million dollars annually in 2023.

219 surpassed $100 million and 13 surpassed $1 billion annually.

Economic headwinds disproportionately impacted top games: The number of games with more than $10 million in consumer spend bounced back, roughly even with the previous high in 2021. The number of games earning $100 million or $1 billion have yet to reach the highs from 2021.

Learn how to isolate changes in the competitive landscape to make informed strategic decisions specific to your business.

Number of Apps Surpassing Annual Global Consumer Spend
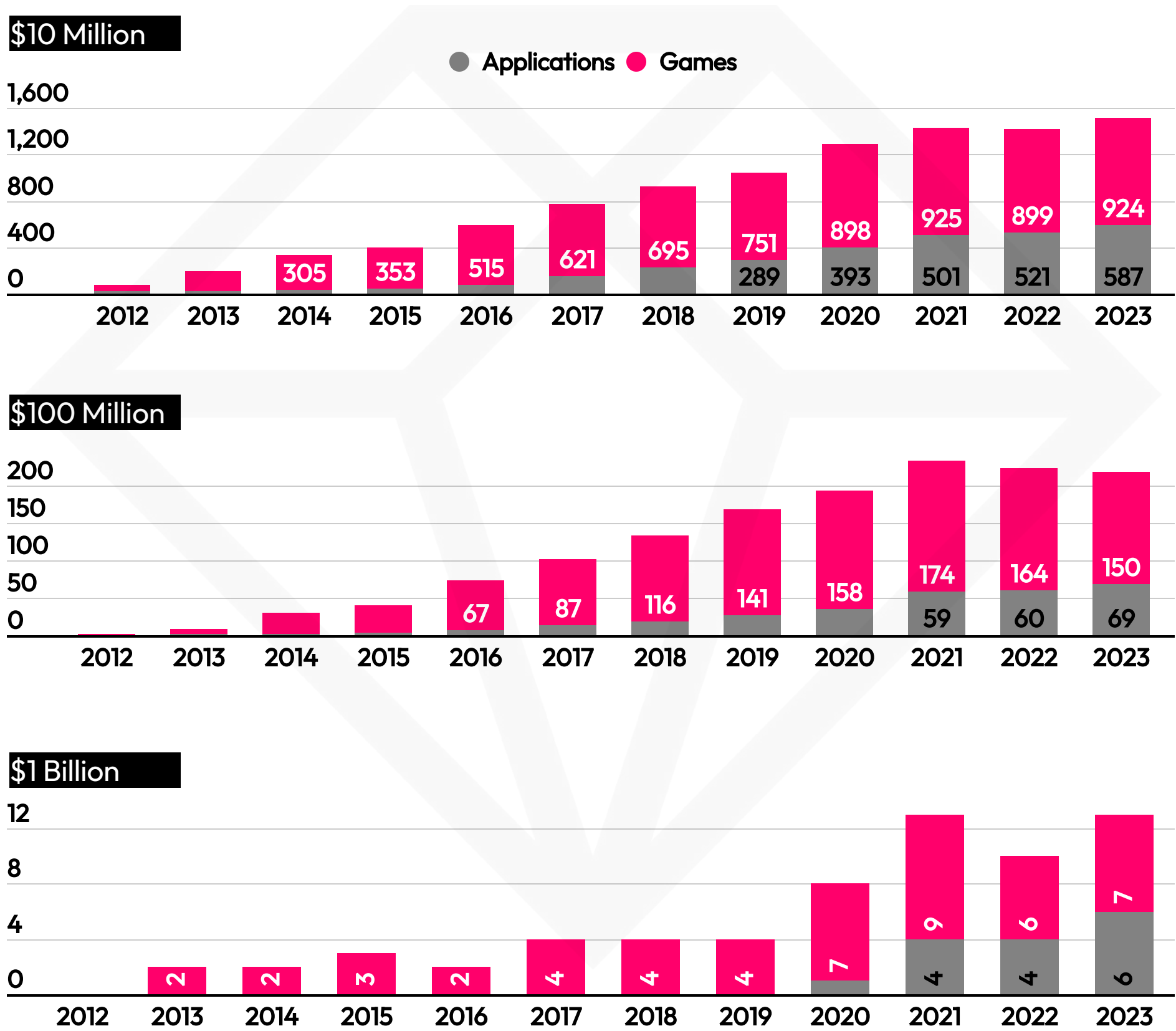
$10 Million

● Applications ● Games

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Games			305	353	515	621	695	751	898	925	899	924
Applications							289	289	393	501	521	587

$100 Million

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Games					67	87	116	141	158	174	164	150
Applications										59	60	69

$1 Billion

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Games		2	2	3	2	4	4	4	7	9	6	7
Applications										4	4	6

Meet the New Entrants to the $1 Billion Club in 2023

Four new apps joined the annual $1 billion club in 2023 with Royal Match leading the way. This was a strong bounce back after no apps entered the club in 2022.

No non-game app reached $1 billion in annual global consumer spend until Tinder in 2020. Five more apps have reached this milestone since, including two new additions this year (Google One and Max).

How did these new entrants monetize so effectively? data.ai's In-App Purchase SKU data reveals which in-app purchases drove these breakout performances.

Apps to Reach $1 Billion in Annual Global Consumer Spend for the First Time

2013
- Candy Crush Saga
- Puzzle & Dragons

2014
- Clash of Clans

2015
- Monster Strike

2016
- 0 New Apps

2017
- Honor of Kings
- Fate/Grand Order
- Lineage 2 Revolution

2018
- 0 New Apps

2019
- 0 New Apps

2020
- Pokémon GO
- ROBLOX
- Coin Master
- Game for Peace
- Tinder
- PUBG Mobile

2021
- TikTok
- Genshin Impact
- YouTube
- Disney+
- Uma Musume Pretty Derby

2022
- 0 New Apps

2023
- Royal Match
- Google One
- Max
- Gardenscapes

Source: data.ai Intelligence | Note: Consumer Spend across iOS, Google Play, iOS only for China; Spend is gross — inclusive of any percent taken by the app stores

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

2023 | Average Age Group Index Among Select Subgenres
Index >100 Skews Towards Demographic Group

Top Apps by MAU by Likelihood of Use

Australia	Australia

● 18 – 24   ● 25 – 44   ● 45+

150
100
50

Video Editing, Short Videos, MicroBlogging, Fantasy Sports, Discussion & Forum, Resell, QSR, Dating, Mental Health, Photo Editing, Live Sports, Budget & Expense ..., Sports Betting, OTT, E-Commerce, Fitness Tracker, Digital Wallets & P..., Grocery Delivery, Flight Booking, Integrated Travel S..., Telehealth

18 – 24	25 – 44	45+
Instagram (Social Media | Media Sharing Networks)	Facebook (Social Media | Social Networks)	BOM Weather (Utility & Productivity | Weather)
Spotify (Entertainment | Music & Audio)	Facebook Messenger (Social Media | Communication)	OneDrive (Utility & Productivity | File Management)
Netflix (Entertainment | OTT)	WhatsApp Messenger (Social Media | Communication)	Woolworths Rewards (Shopping | Coupons & Rewards)
TikTok (Entertainment | Short Videos)	Microsoft Outlook (Utility & Productivity | Email)	ANZ Australia (Finance | Mobile Banking)
Snapchat (Social Media | Media Sharing Networks)	CommBank (Finance | Mobile Banking)	Service NSW (Utility & Productivity | Public Service)

Source: data.ai Intelligence | Note: 2023, Android Phone. Average of Demographic Index : measure of demographic cohort compared to the overall population) among top 20 apps by average MAU per Genre.

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Health and Video Editing Apps Tend to Skew Female

2023 | Average Gender Index Among Select Subgenres
Index >100 Skews Towards Demographic Group

Top Apps by MAU by Likelihood of Use

‹ | Australia ⌄ | ›

‹ | Australia ⌄ | ›

● Female   ● Male

200

150

100

50

0

Mental Health, Video Editing, E-Commerce, Telehealth, Photo Editing, Budget & Expense T..., Grocery Delivery, Integrated Travel S..., OTT, Fitness Tracker, Short Videos, Digital Wallets & Pa..., Flight Booking, Resell, MicroBlogging, QSR, Discussion & Forum, Dating, Sports Betting, Live Sports, Fantasy Sports

Female

Facebook Messenger (Social Media | Communication)

Snapchat (Social Media | Media Sharing Networks)

Microsoft Office Mobile (Business | Business Software)

Woolworths Rewards (Shopping | Coupons & Rewards)

Pinterest (Social Media | Media Sharing Networks)

Male

Facebook (Social Media | Social Networks)

WhatsApp Messenger (Social Media | Communication)

Instagram (Social Media | Media Sharing Networks)

Spotify (Entertainment | Music & Audio)

Microsoft Outlook (Utility & Productivity | Email)

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The Most Searched iOS App Store Keywords in 2023

Entitlement | OTT

Rank	Brazil	Canada	China	France	Germany	India	Indonesia	Japan	Mexico	Saudi Arabia	South Korea	Thailand	Turkey	United Kingdom	United States
1	netflix	netflix	视频	netflix	netflix	netflix	video	tver	netflix	netflix	넷플릭스	netflix	netflix	netflix	netflix
2	globoplay	amazon prime	爱奇艺	prime video	disney	hotstar	film	netflix	hbo max	shahid	쿠팡플레이	wetv	tv	disney	disney+
3	prime video	prime video	腾讯视频	amazon prime video	rtl	jio cinema	netflix	ねっとふりっくす	hbo	tv	티빙	viu	exxen	disney+	hulu
4	globo	tv	腾讯	canal	ard mediathek	mx player	videos	てぃーばー無料	disney	انمي	디즈니플러스	iqiyi	blutv	bbc iplayer	paramount
5	amazon prime	amazon prime video	电影	my canal	amazon prime video	voot	vidio	abema	prime video	osn	웨이브	tv	trt	itv hub	paramount+
6	tv	disney	优酷	crunchyroll	prime video	sony liv app	tv	u next	amazon prime	طيور الجنة	netflix	trueid	amazon prime	itv	hbo max
7	filmes	prime	樱花动漫	paramount	joyn	zee5	rcti	あべま tv	tv	anime	디즈니	disney	videos	sky go	peacock tv
8	hbo max	crave	芒果tv	mytf1	wow	prime video	nonton	あべま tv	amazon prime video	noor	왓챠	ais play	bein connect	prime video	prime video
9	amazon prime video	videos	英超	france.tv	sky go	amazon prime video	viu	あべま tv	totalplay	نت	라프텔	ดูทีวีออนไลน์	disney	now tv	amazon prime
10	hbo	ctv	动漫	molotov tv	crunchyroll	disney hotstar	wetv	hulu	universal	amazon prime	wavve	ch3	star	amazon prime video	tubi

Source: data.ai Intelligence | Note: iPhones; ranked by average Search Volume

AI on Mobile

AI took the world by storm in 2023, and mobile was no exception. Generative AI was the breakout mobile genre and market leaders across verticals integrated AI into their mobile solutions.

In 2023, we became #1 French consumer app publisher in the world by focusing on creating exceptional products for profitable growth. Leveraging data.ai for market insights allows us to build scalable publishing solutions with our expanding community of developers. With 2024's AI Act reshaping the landscape, market foresight becomes indispensable.

Jean-Baptiste Hironde
CEO & Founder

MWM

Generative AI App Weekly Downloads by Subgenre

Worldwide ˅

- ● AI Chatbot ● AI Art Generator
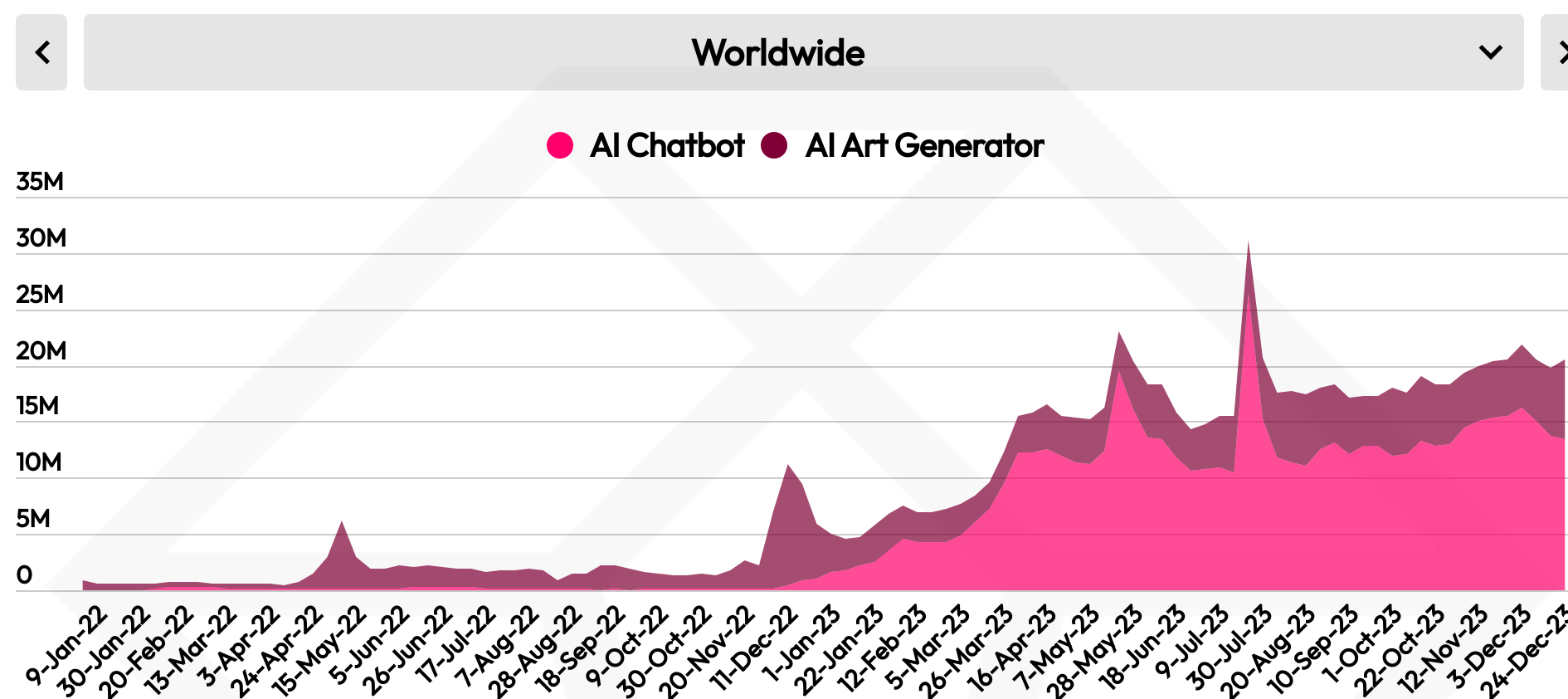
Generative AI App Weekly Consumer Spend by Subgenre
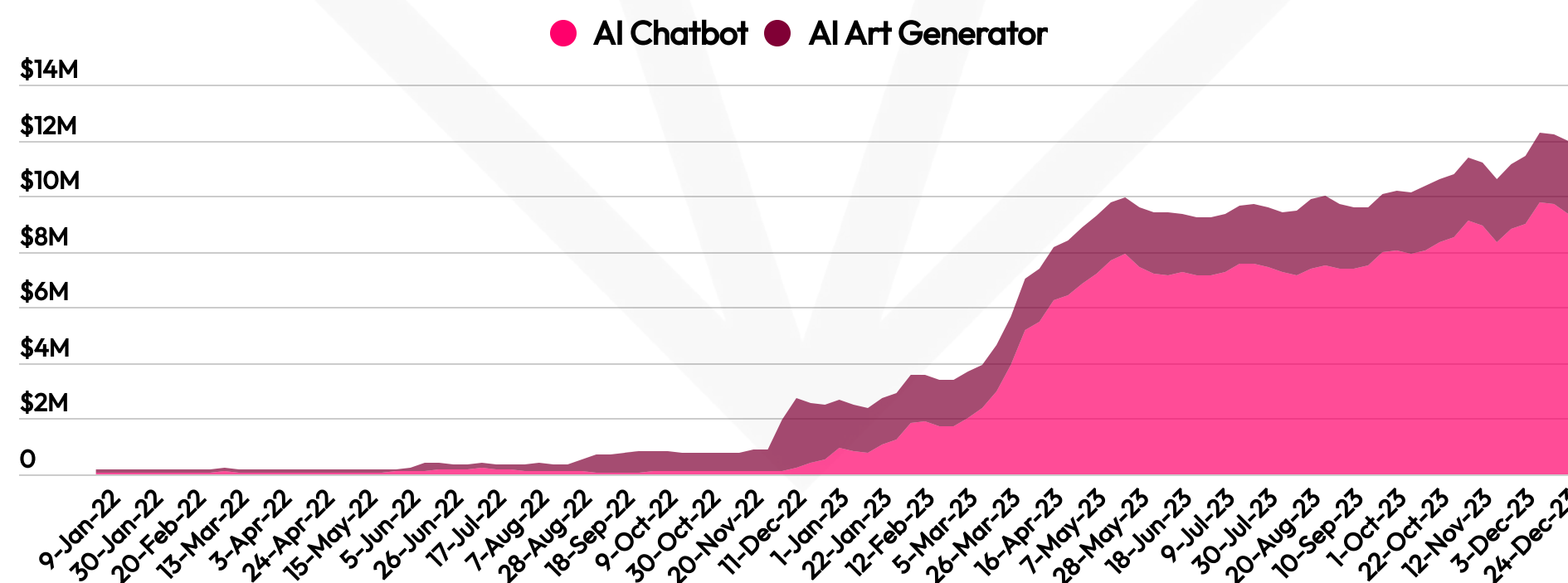
- ● AI Chatbot ● AI Art Generator

Source: data.ai Intelligence | Note: Downloads and consumer spend across iOS, Google Play; China is iOS only.
Generative AI apps are classified using data.ai's App IQ taxonomy.

AI ON MOBILE

Generative AI is the Breakout Genre of 2023

Generative AI, data.ai's latest addition to its App IQ taxonomy, emerged as one of the fastest growing genres of 2023. AI Chatbot apps really took off in the later part of the year with the launches of ChatGPT and Character AI and adoption has remained strong since.

Consumer spend also continued to climb throughout 2023 after huge growth earlier in the year. Many top apps like ChatGPT include subscription offerings to unlock additional features.

The AI popularity was fairly global, though the genre did not rank among the top five breakout genres in several Asian and Middle Eastern market including China, Japan, Saudi Arabia, and Turkey.

Find out which apps are driving this growth with Top Apps, powered by data.ai's App IQ

data.ai | STATE OF MOBILE 2024

Not Just for Chatting: Apps Across Verticals Find Success with AI

A cohort of 20 top apps that recently added AI features outperformed the market in 2023 with 11% YoY growth. The positive results were also well distributed — 13 of the 20 (65%) saw positive growth.

AI has made its way across the mobile spectrum, from Social (Snapchat) to Education (Duolingo) to Finance (Wells Fargo). In fact, these 20 apps represent eight different genres and 14 subgenres.

Check out how recent feature improvements affected an app's performance across all key metrics.

Year-over-Year Global Download Growth for Apps that Have Added AI Features

| | +11% | -15% | +39% | +28% | +21% | +12% | +1,500% | +94% | -13% | +9% |

Cohort · Snapchat · Duolingo: Learn Languages · Google · Google Maps · Waze · Bing · Microsoft Edge · Skype · Expedia

— 2022 — 2023

| -7% | +83% | -14% | -3% | -24% | +0% | -43% | +16% | +6% | +20% | +113% |

Slack · Shopify · ELSA Speak · Instacart · Calm · Wells Fargo Mobile · Socratic by Google · Chegg · Salesforce · Cleo · Ally
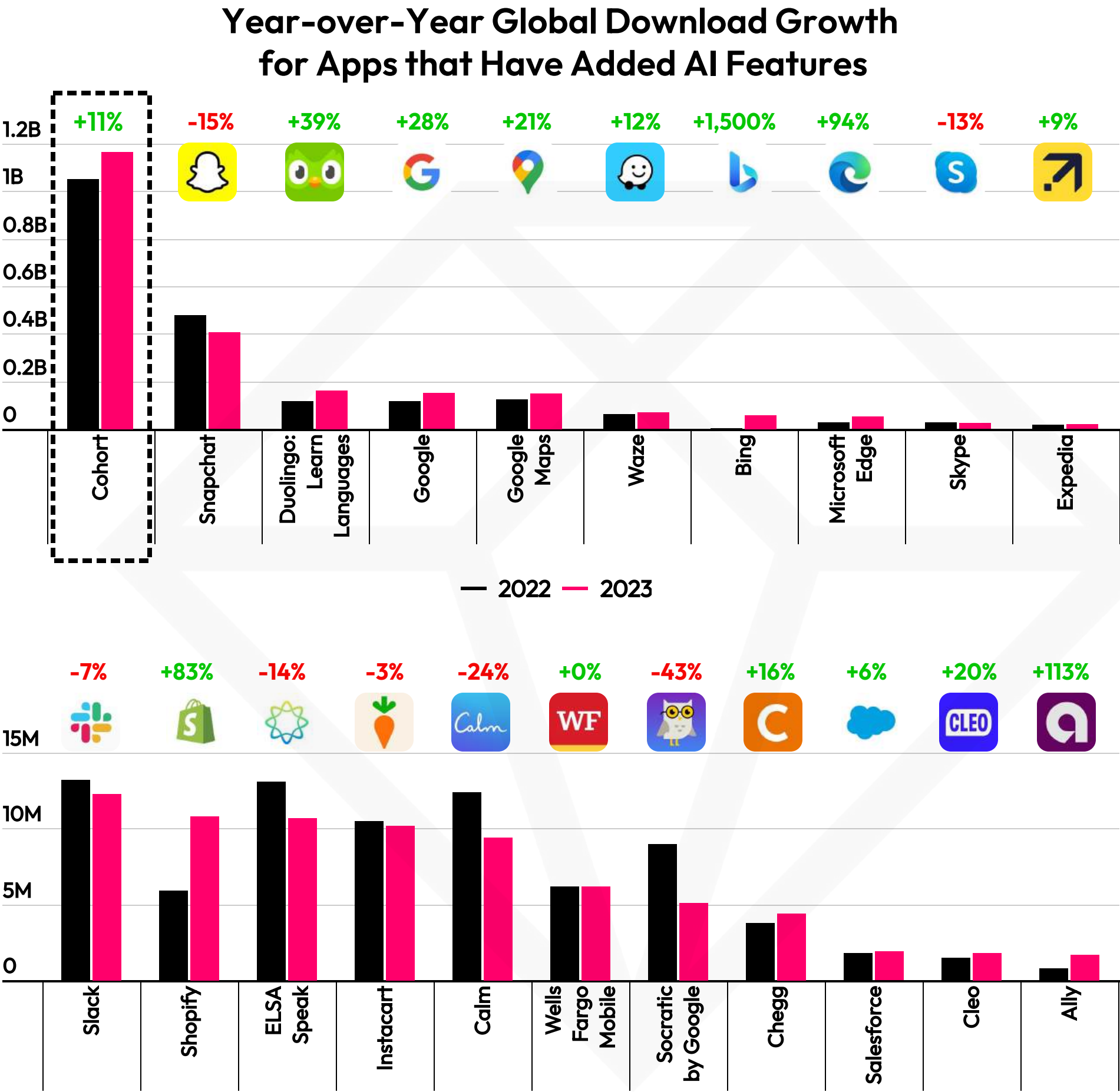
Source: data.ai Intelligence | Note: Cohort of select apps that have added AI features.

The AI Enthusiasm Hit Mobile in 2023 — and with Many More Apps Than Just ChatGPT

Thousands of apps flocked to the iOS App Store and Google Play store with ai-related solutions. More than 4,000 apps added "chatbot" to their app descriptions, and more than 3,500 added "gpt".

The majority of ai-related apps launched in 2023. For example, 2,500 apps launched in 2023 with "chatbot" in their description — nearly double the apps launched in the previous four years combined.

Apps with AI-Related Terms in App Names or Descriptions in 2023

| "ai art" | "ai chat" | "ai write" | "chatbot" | "chatgpt" | "gpt" |
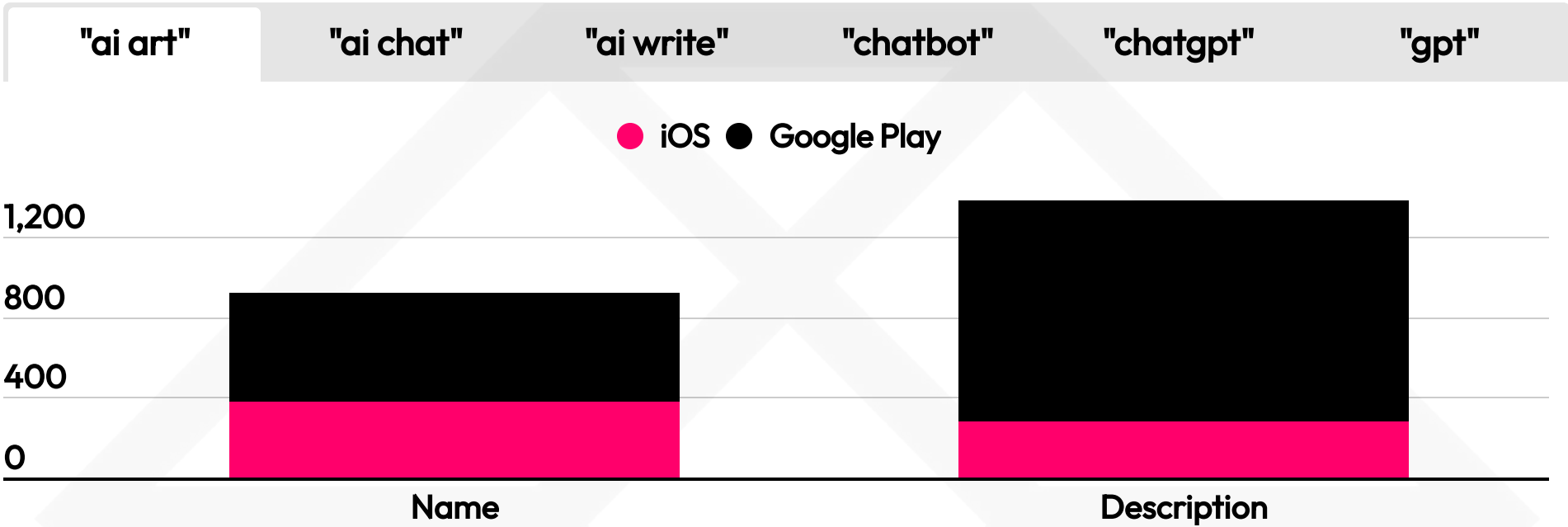
● iOS   ● Google Play

Release Years for Apps with AI-Related Terms
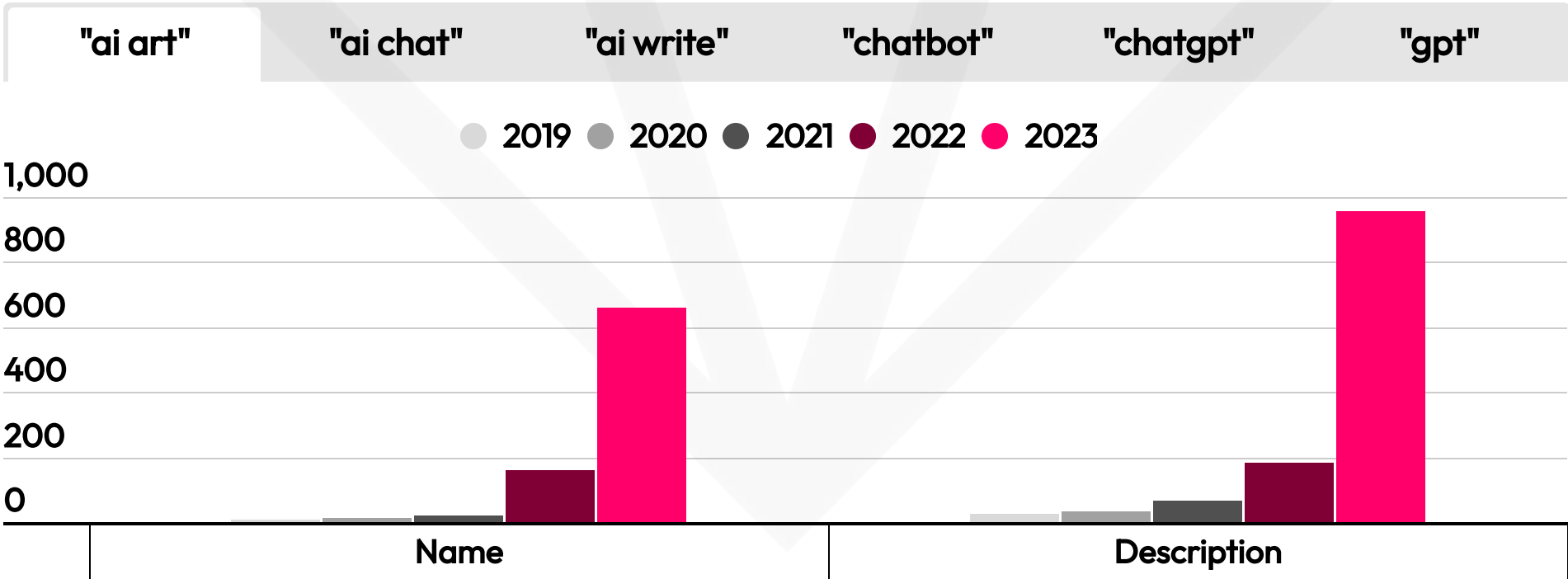
| "ai art" | "ai chat" | "ai write" | "chatbot" | "chatgpt" | "gpt" |

● 2019   ● 2020   ● 2021   ● 2022   ● 2023

Gaming

Demand for games at all-time high, yet spending on in-game purchases cools.

data.ai offers market industry benchmarking and competitive insights that are an essential aid to companies that desire to be at the forefront. Complementing our own analytics, it offers side by side view of market data that affords us the opportunity to maintain a competitive edge, to remain innovative and to have the ability to pivot as the fast paced gaming market requires.

Matt Liu

Head of NetEase Games Overseas Publishing

NetEase Games

Consumer Spend in Mobile Gaming Fell 2% in 2023 to $107.3 Billion — Downloads Dipped to Around 88 Billion

In 2023, well known IP games such as Monopoly GO and EA SPORTS FC Mobile Soccer saw breakout success as mobile games are now capable of offering console-quality graphics and gameplay experiences.

Hit Open World RPG Genshin Impact continued to break new grounds, crossing $4 Billion in all-time consumer spend in Q1 2023.

Puzzle and Hypercasual games like Block Blast Adventure Master and Attack Hole were key download drivers, but 2023 saw some surprise hits such as Avatar Life Simulation game Gacha Life 2, and Party Royale game Eggy Party, making major gains in downloads and usage.

Monitor market movements day-by-day with a data.ai account to get the scoop on the latest shifts and emerging opportunities.

Mobile Game Consumer Spend Growth

Worldwide

	2020	2020-2021 Growth	2021-2022 Growth	2022-2023 Growth	2023
	$100.53B	$15.29B	$16.32B		$107.31B
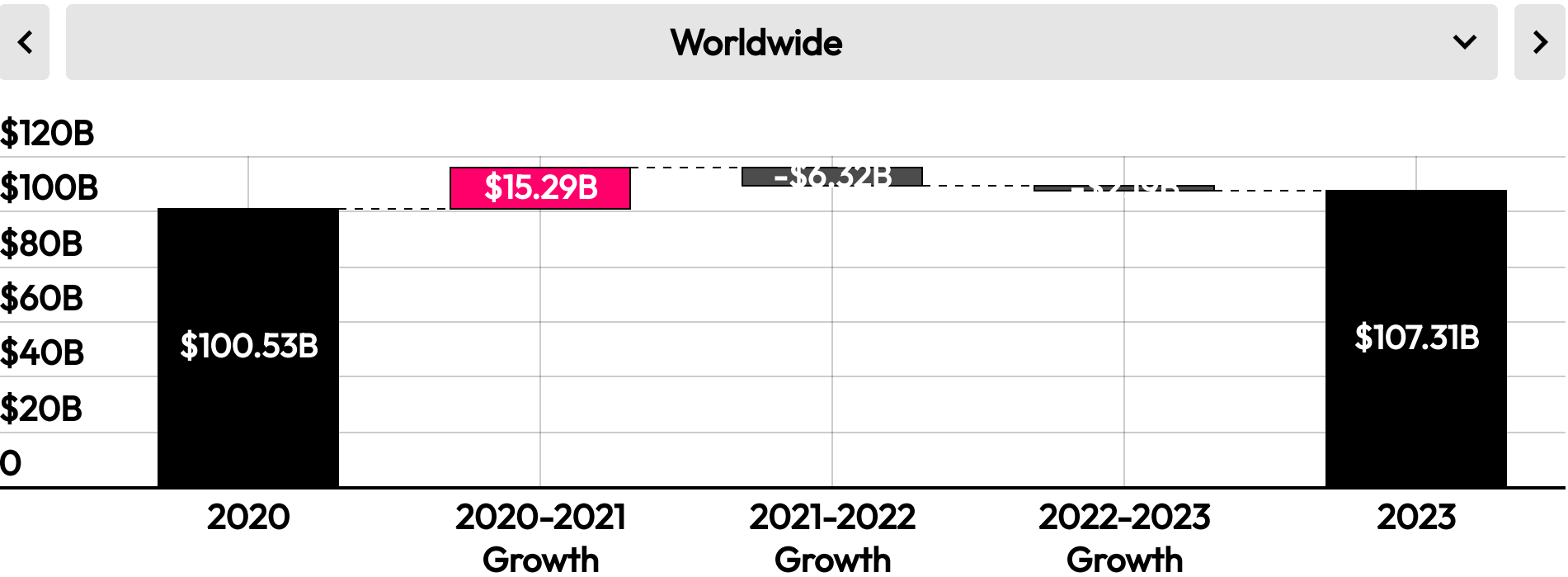
Mobile Game Download Growth
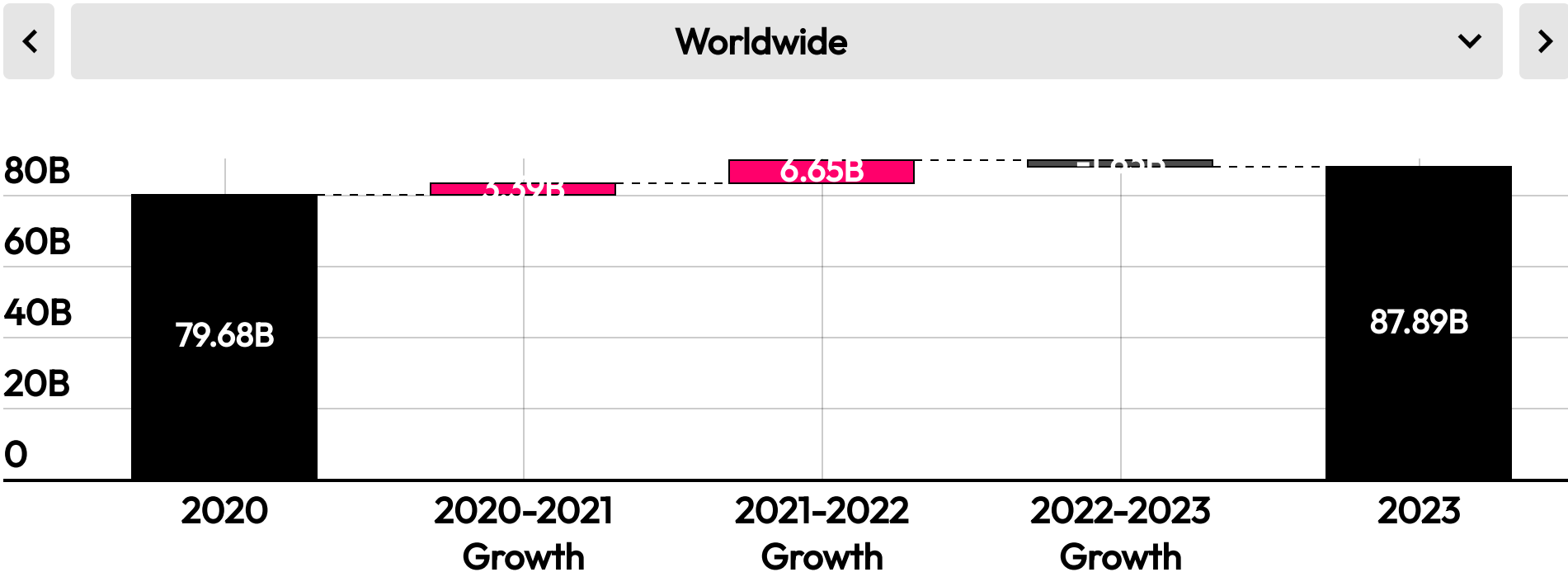
Worldwide

	2020	2020-2021 Growth	2021-2022 Growth	2022-2023 Growth	2023
	79.68B	3.39B	6.65B		87.89B

Over 1.1 B Downloads, $1.5B Spend Spent Per Week on Mobile Games Globally in 2023

< Worldwide ∨ >

Average Weekly Downloads and Consumer Spend for Mobile Games Each Month
2020 - 2023

Downloads
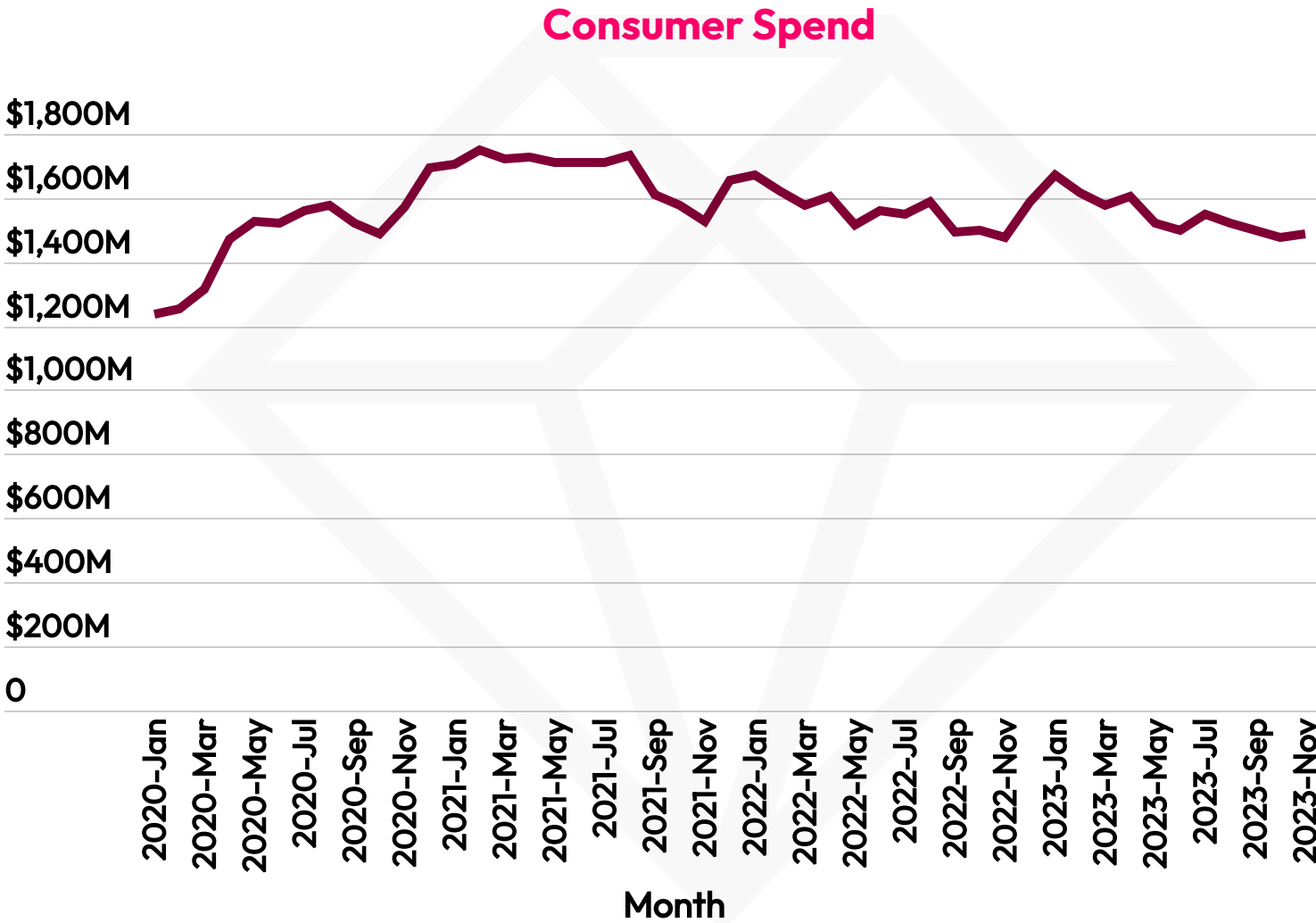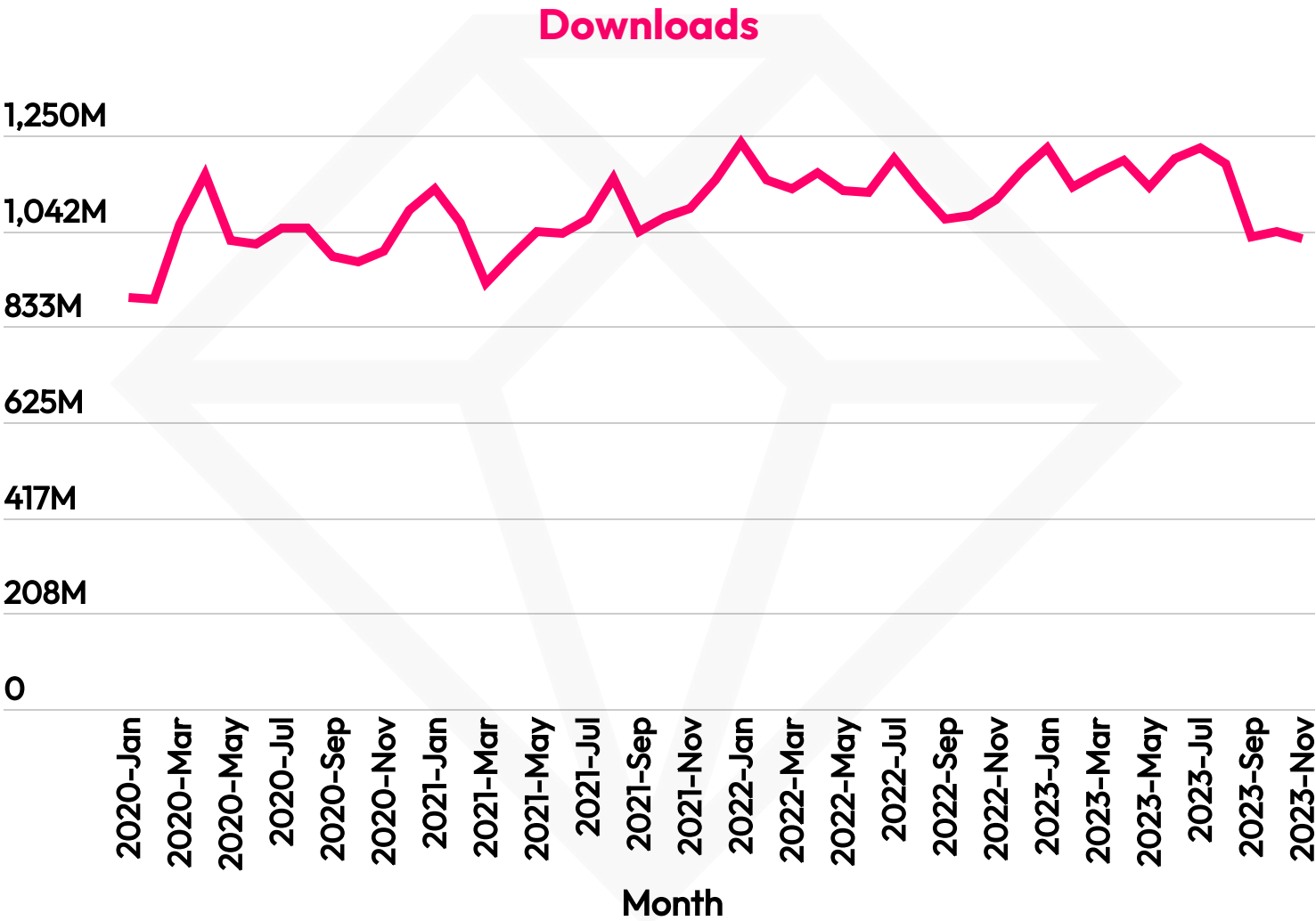
Consumer Spend

Source: data.ai Intelligence | Note: Downloads and consumer spend are across iOS and Google Play. iOS only for China.

Who are the Leaders by Downloads?
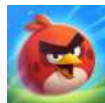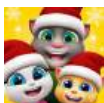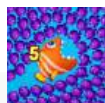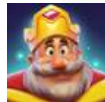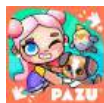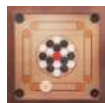
2023 | **Worldwide Top Mobile Game Genres by Downloads** | Powered by data.ai's Game IQ Taxonomy

Worldwide

#1 - Hypercasual

16.4 B in Downloads
YoY Downloads –7.5% ▼
YoY IAP Spend +52.9% ▲
28% of All Downloads ▼
0.5% of All IAP Spend ▲

#2 - Simulation

10.5 B in Downloads
YoY Downloads +0.7% ▲
YoY IAP Spend –5.3% ▼
18% of All Downloads ▲
9.5% of All IAP Spend ▼

#3 - Action

5.5 B in Downloads
YoY Downloads –12.1% ▼
YoY IAP Spend –10.3% ▼
9% of All Downloads ▼
5.8% of All IAP Spend ▼

#4 - Kids

4.3 B in Downloads
YoY Downloads +0.1% ▲
YoY IAP Spend +10.8% ▲
7% of All Downloads ▲
0.7% of All IAP Spend ▲

#5 - Puzzle

3.1 B in Downloads
YoY Downloads +4.9% ▲
YoY IAP Spend +1.8% ▲
5% of All Downloads ▲
1.6% of All IAP Spend ▲

#6 - Match

3.1 B in Downloads
YoY Downloads +6.7% ▲
YoY IAP Spend +16.3% ▲
5% of All Downloads ▲
12.6% of All IAP Spend ▲

#7 - Racing

2.6 B in Downloads
YoY Downloads –1.4% ▼
YoY IAP Spend –7.4% ▼
4% of All Downloads ▲
0.8% of All IAP Spend ▼

#8 - Tabletop

2.5 B in Downloads
YoY Downloads +5.7% ▲
YoY IAP Spend +4.8% ▲
4% of All Downloads ▲
2.0% of All IAP Spend ▲

Source: data.ai Intelligence | Note: Downloads across iOS, Google Play. iOS Only for China. Spend is gross — inclusive of any percent taken by the app stores

Top 20 Global Game Subgenres by Downloads in 2023

‹ | **Worldwide** ⌄ | **›**

	Share of Total	#1 App
Hypercasual | Puzzle	6.9%	Thief Puzzle
Hypercasual | Action	6.8%	Attack Hole
Hypercasual | Simulation	6.0%	My Perfect Hotel
Simulation | Driving	5.1%	Indian Bikes Driving 3D
Simulation | Creative Sandbox	2.7%	ROBLOX
Sports | Simulation Sports	2.6%	8 Ball Pool
Hypercasual | .io	2.3%	Bridge Race
Racing | Arcade Racing	2.2%	Hill Climb Racing
Racing | Simulation Racing	2.0%	Traffic Rider
Action | Runner	1.9%	Subway Surfers
Action | Open World	1.9%	Rope Hero: Vice Town
Simulation | Dress Up & Lifestyle	1.8%	Doll Dress Up: Sweet Girl
Kids | Creative World	1.8%	Toca Life: World
Simulation | Pet	1.7%	My Talking Tom 2
Hypercasual | Music	1.7%	Magic Tiles 3
Shooting | PvE Shooting	1.6%	Beach War
Puzzle | Word	1.4%	Words Of Wonders
Simulation | Idle	1.3%	Idle Lumber Empire
Strategy | 4X March-Battle	1.2%	Lords Mobile
Shooting | Team Deathmatch	1.2%	Call of Duty: Mobile

Chart x-axis: 0, 0.5B, 1B, 1.5B, 2B, 2.5B, 3B, 3.5B, 4B, 4.5B

Hypercasual Games Continue to Drive the Largest Share of Downloads

Hypercasual games as a genre have seen a boom in demand. As the market becomes increasingly competitive, we expect more hypercasual games to evolve in terms of blending mechanics to create deeper engagement.

Hypercasual games have been a great user acquisition funnel for many publishers and now we expect the focus to shift partially to building depth and engagement since they have acquired a significant footprint.

Innovative Genres such as Avatar Life (Gacha Life 2) and Party Royale (Eggy Party) are poised to disrupt incumbent market dominance.

Remain ahead of competitors with market specific insights segmented by sub-genre, using data.ai's unique Game IQ taxonomy.

Fewer New Releases Enter the Market; Average Downloads of Past Releases Surpass Volume by New Releases Indicating Mobile Games Having Longer Life Cycle

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

United States

Legend: ● Hypercasual ● RPG ● Simulation ● Match ● Sports ○ Shooting ● Other

Number of New Releases (2019–2023)

Avg Downloads (4M, 3M, 2M, 1M, 0) (2019–2023)

● Past Release Avg Downloads ● New Release Avg Downloads
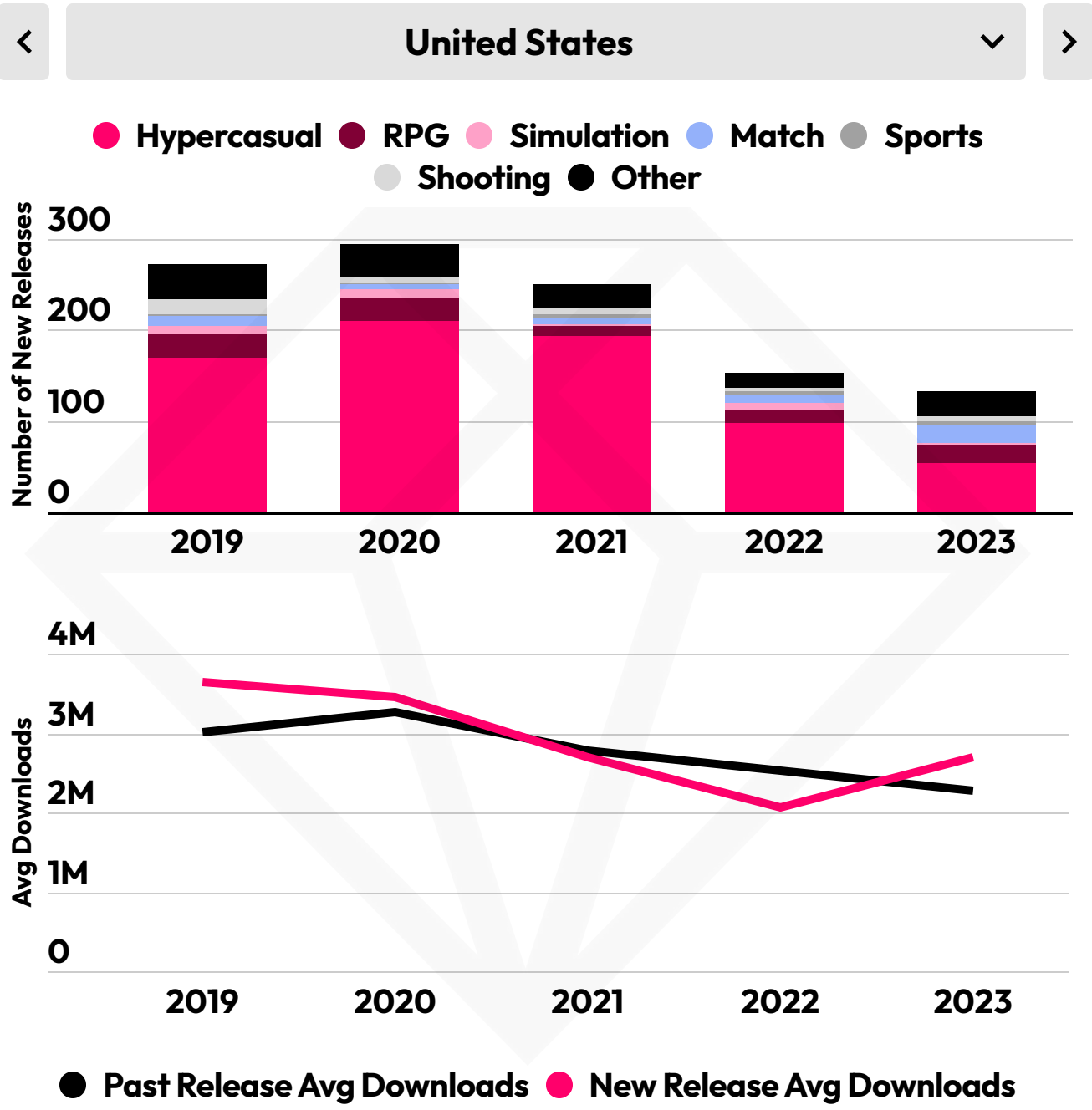
Top New Releases by Downloads

#	2019	2020	2021	2022	2023
1	Mario Kart Tour (Racing | Competitive Racing)	Tangle Master 3D (Hypercasual | Puzzle)	Bridge Race (Hypercasual | .io)	Fill The Fridge (Hypercasual | Puzzle)	Gacha Life 2 (Simulation | Avatar Life)
2	Call of Duty: Mobile (Shooting | Team Deathmatch)	Cube Surfer (Hypercasual | Action)	Paper Fold (Hypercasual | Puzzle)	Tall Man Run (Hypercasual | Action)	Monopoly GO: Family Board Game (Party | Luck Battle)
3	aquapark.io (Hypercasual | .io)	Spiral Roll (Hypercasual | Action)	Count Masters (Hypercasual | Action)	Apex Legends (Shooting | Battle Royale)	Honkai: Star Rail (RPG | Team Battle)
4	Run Race 3D (Hypercasual | Action)	Draw Climber (Hypercasual | Puzzle)	Hair Challenge (Hypercasual | Action)	Crowd Evolution (Hypercasual | Action)	Mighty DOOM (Action | Shoot'em Up)
5	Roller Splat (Hypercasual | Puzzle)	Sort It 3D (Hypercasual | Puzzle)	Crash Bandicoot: On the Run (Action | Runner)	Office Fever (Hypercasual | Simulation)	Street Fighter: Duel (RPG | Team Battle)

Top Past Releases by Downloads

#	2019	2020	2021	2022	2023
1	Color Bump 3D (Hypercasual | Ball)	ROBLOX (Simulation | Creative Sandbox)	ROBLOX (Simulation | Creative Sandbox)	ROBLOX (Simulation | Creative Sandbox)	ROBLOX (Simulation | Creative Sandbox)
2	ROBLOX (Simulation | Creative Sandbox)	Among Us! (Party | Mafia/Betrayal)	Among Us! (Party | Mafia/Betrayal)	Subway Surfers (Action | Runner)	Royal Match (Match | M3-Meta)
3	Wordscapes (Puzzle | Word)	Call of Duty: Mobile (Shooting | Team Deathmatch)	Project Makeover (Match | M3-Meta)	Stumble Guys (Party | Party Royale)	Subway Surfers (Action | Runner)
4	Polysphere (Hypercasual | Puzzle)	Subway Surfers (Action | Runner)	Subway Surfers (Action | Runner)	Wordle by Goldfinch Studios (Puzzle | Word)	Block Blast Adventure Master (Puzzle | Tile-Matching)
5	Tiles Hop: EDM Rush (Hypercasual | Music)	Coin Master (Party | Luck Battle)	High Heels (Hypercasual | Action)	Count Masters (Hypercasual | Action)	Magic Tiles 3 (Hypercasual | Music)

Discover Which Game Genres are the Most Saturated

2023 | Top Genre Per Market Concentration by Downloads

Worldwide

Top Genre by Market Concentration

● Top 3 Game Share of Market   ● Top 20 Share of Market   ● Rest of Market

Genre	Top 3 Game Share	Top 20 Share	Rest of Market
Party	23.3%	45.8%	30.9%
Other	18.2%	38.8%	43.1%
Shooting	15.8%	19.9%	64.3%
Sports	15.4%	23.7%	60.9%
Match	12.9%	20.2%	66.9%
Tabletop	11.6%	19.9%	68.4%
Strategy	10.8%	31.9%	57.3%
Racing	9.5%	22.8%	67.7%
Puzzle	8.3%	13.4%	78.3%
RPG	8.0%	17.1%	74.8%
Action	7.4%	15.6%	77.1%
Casino		10.3%	85.2%
Kids		10.6%	85.4%
Simulation		10.3%	85.7%
Hypercasual		7.6%	90.3%

Share of Downloads by Time Since Release

● < 6 Mths   ● 6 Mths to 1 Yr   ● 1 to 2 Yrs   ● > 2 Yrs

Genre	< 6 Mths	6 Mths to 1 Yr	1 to 2 Yrs	> 2 Yrs
Party		31.39%		65.38%
Other		12.01%	42.10%	40.98%
Shooting		27.64%		65.56%
Sports		25.28%		68.29%
Match		9.91%	33.17%	52.57%
Tabletop		27.92%		64.52%
Strategy		29.02%		61.44%
Racing		20.43%		67.87%
Puzzle		29.69%		60.37%
RPG	12.01%	20.92%	26.81%	40.27%
Action		19.58%		69.24%
Casino	19.14%	29.34%		45.40%
Kids		24.43%		69.94%
Simulation		32.21%		52.63%
Hypercasual	13.03%	55.30%		27.44%

Top 3 Games

Who are the Leaders by Consumer Spend?

2023 | **Worldwide Top Mobile Game Genres by Consumer Spend** | Powered by data.ai's Game IQ Taxonomy
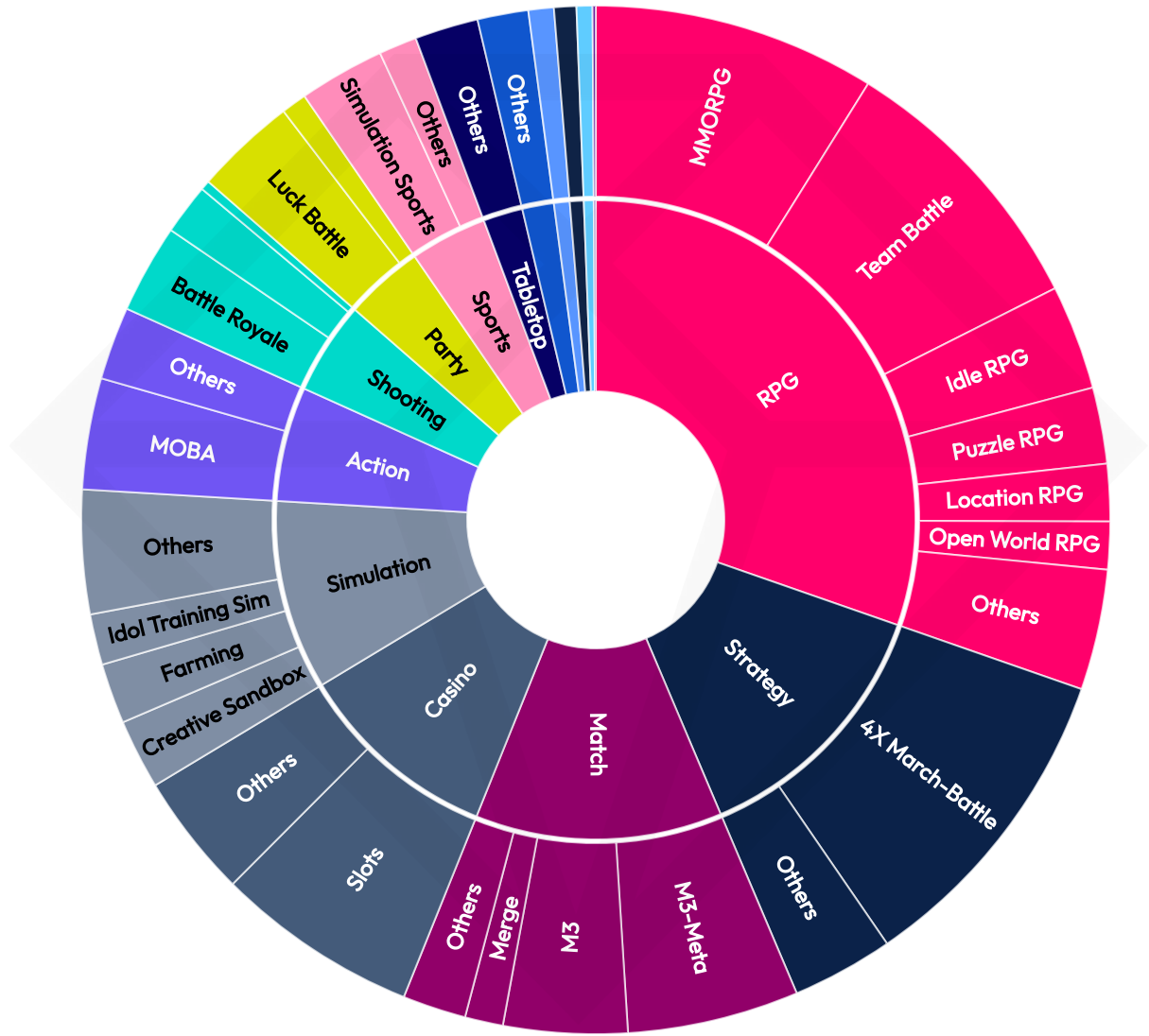
#1 - RPG

$24.5 B in (IAP) Spend
YoY IAP Spend -3.8% ▼
YoY Downloads +19.7% ▲
30% of All IAP Spend ▼
3% of All Downloads ▲

#2 - Strategy

$10.7 B in (IAP) Spend
YoY IAP Spend -11.7% ▼
YoY Downloads +2.2% ▲
13% of All IAP Spend ▼
2% of All Downloads ▲

#3 - Match

$10.2 B in (IAP) Spend
YoY IAP Spend +16.3% ▲
YoY Downloads +6.7% ▲
13% of All IAP Spend ▲
5% of All Downloads ▲

#4 - Casino

$8.3 B in (IAP) Spend
YoY IAP Spend -0.1% ▼
YoY Downloads -1.5% ▼
10% of All IAP Spend ▲
3% of All Downloads ▲

#5 - Simulation

$7.7 B in (IAP) Spend
YoY IAP Spend -5.3% ▼
YoY Downloads +0.7% ▲
10% of All IAP Spend ▼
18% of All Downloads ▲

#6 - Action

$4.7 B in (IAP) Spend
YoY IAP Spend -10.3% ▼
YoY Downloads -12.1% ▼
6% of All IAP Spend ▼
9% of All Downloads ▼

#7 - Shooting

$3.8 B in (IAP) Spend
YoY IAP Spend -21.3% ▼
YoY Downloads -6.0% ▼
5% of All IAP Spend ▼
4% of All Downloads ▼

#8 - Party

$3.3 B in (IAP) Spend
YoY IAP Spend +84.4% ▲
YoY Downloads +6.7% ▲
4% of All IAP Spend ▲
2% of All Downloads ▲

Top 20 Global Game Subgenres by Consumer Spend in 2023

<	Worldwide ⌄	>	Share of Total	#1 App

Subgenre	Share of Total	#1 App
Strategy	4X March-Battle	10.1%	Evony
RPG	MMORPG	8.9%	Lineage M
RPG	Team Battle	8.7%	Honkai: Star Rail
Casino	Slots	6.4%	Jackpot Party Casino
Match	M3-Meta	5.4%	Royal Match
Match	M3	3.9%	Candy Crush Saga
Action	MOBA	3.5%	Honor of Kings
RPG	Idle RPG	3.3%	Pixel Heroes
Party	Luck Battle	3.2%	Coin Master
Shooting	Battle Royale	2.8%	Game For Peace
Sports	Simulation Sports	2.7%	Professional Baseball Spirits A
RPG	Puzzle RPG	2.4%	Monster Strike
Simulation	Creative Sandbox	2.2%	ROBLOX
Simulation	Farming	1.9%	Township
RPG	Location RPG	1.8%	Pokémon GO
Shooting	Team Deathmatch	1.6%	Call of Duty: Mobile
Simulation	Idol Training Sim	1.6%	Uma Musume Pretty Derby
RPG	Open World RPG	1.5%	Genshin Impact
Match	Merge	1.2%	Merge Mansion
Strategy	Build-Battle	1.0%	Clash of Clans

X-axis: 0 $1B $2B $3B $4B $5B $6B $7B $8B $9B

Source: data.ai Intelligence | Note: Among gaming apps; Consumer spend across iOS & Google Play and China is iOS only. Spend is gross — inclusive of any percent taken by the app stores; Based on Game IQ primary categorization as of Jan 4, 2024

Strategy and RPG are Among the Most Successful Genres for Game Monetization

Casino genres have been the leading genre in markets including the United States and Canada, but in recent years Strategy and RPG Games have encroached on market share. Top genres such as 4x March-Battle, MMORPG and Battle Royale tend to feature online multiplayer mechanics — indicating an appetite for connection and social experiences exists across the gaming spectrum.

Cross-play features are becoming increasingly prominent in the top games — the ability to access the same game progress across devices (whether on mobile or console, for instance) appears to be on the rise, as is playing against players using different platform versions of the same game.

Navigate macroeconomic headwinds: Spot high-growth markets on a weekly basis with a data.ai account. Drill down deeper with our Game IQ taxonomy in each market.

Older Games Are Driving Revenue While Average Consumer Spend Among New Releases Remains Stable

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

< **United States** ∨ >

● RPG ● Strategy ● Match ● Simulation ● Sports
○ Hypercasual ● Other

Number of New Releases: 100, 50, 0 — 2019, 2020, 2021, 2022, 2023

Avg Consumer Spend: $30M, $20M, $10M, 0 — 2019, 2020, 2021, 2022, 2023

● Past Release Avg Spend ● New Release Avg Spend
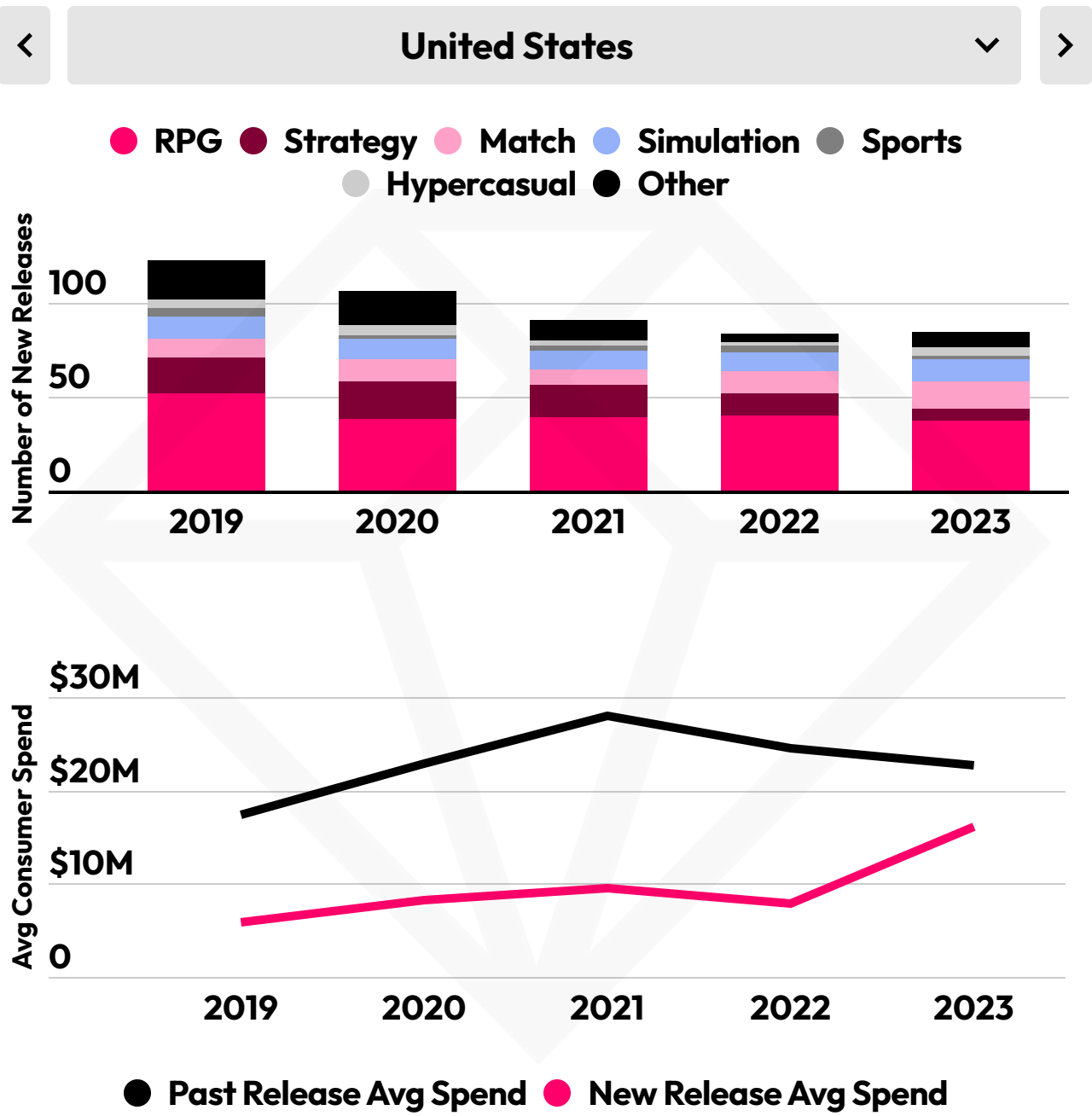
Top New Releases by Consumer Spend Each Year

	2019	2020	2021	2022	2023
1	AFK Arena (RPG | Idle RPG)	Genshin Impact (RPG | Open World RPG)	Royal Match (Match | M3-Meta)	Diablo Immortal (RPG | MMORPG)	Monopoly GO: Family Board Game (Party | Luck Battle)
2	RAID: Shadow Legends (RPG | Team Battle)	The Seven Deadly Sins: Hikari to Yami no Grand Cross (RPG | Team Battle)	Cookie Run: Kingdom (RPG | Team Battle)	Dislyte (RPG | Team Battle)	Whiteout Survival (Strategy | 4X March-Battle)
3	MLB Tap Sports Baseball 2019 (Sports | Simulation Sports)	MLB Tap Sports Baseball 2020 (Sports | Simulation Sports)	MLB Tap Sports Baseball 2021 (Sports | Simulation Sports)	Survivor!.io (RPG | Roguelike ARPG)	Honkai: Star Rail (RPG | Team Battle)
4	Call of Duty: Mobile (Shooting | Team Deathmatch)	Redecor (Simulation | Home Design)	My Hero Academia: Strongest Hero (RPG | MMORPG)	GODDESS OF VICTORY: NIKKE (RPG | Team Battle)	Call of Dragons (Strategy | 4X March-Battle)
5	Lily's Garden (Match | Blast-Meta)	Arknights (RPG | Tower Defense RPG)	Family Farm Adventure (Simulation | Farming)	MLB Tap Sports Baseball 2022 (Sports | Simulation Sports)	Street Fighter: Duel (RPG | Team Battle)

Top Past Releases by Consumer Spend

	2019	2020	2021	2022	2023
1	Candy Crush Saga (Match | M3)	ROBLOX (Simulation | Creative Sandbox)	ROBLOX (Simulation | Creative Sandbox)	Candy Crush Saga (Match | M3)	Candy Crush Saga (Match | M3)
2	Clash of Clans (Strategy | Build-Battle)	Candy Crush Saga (Match | M3)	Candy Crush Saga (Match | M3)	ROBLOX (Simulation | Creative Sandbox)	Royal Match (Match | M3-Meta)
3	Pokémon GO (RPG | Location RPG)	Coin Master (Party | Luck Battle)	Free Fire (Shooting | Battle Royale)	Coin Master (Party | Luck Battle)	ROBLOX (Simulation | Creative Sandbox)
4	Fortnite (Shooting | Battle Royale)	Pokémon GO (RPG | Location RPG)	Coin Master (Party | Luck Battle)	Royal Match (Match | M3-Meta)	Coin Master (Party | Luck Battle)
5	ROBLOX (Simulation | Creative Sandbox)	Homescapes (Match | M3-Meta)	Pokémon GO (RPG | Location RPG)	Pokémon GO (RPG | Location RPG)	Pokémon GO (RPG | Location RPG)

data.ai | STATE OF MOBILE 2024

Monopoly GO a Standout Launch for the Party Genre

2023 | Top Genre Per Market Concentration by Consumer Spend

Worldwide

Top Genre by Market Concentration

● Top 3 Game Share of Market ● Top 20 Share of Market ● Rest of Market

Genre	Top 3 Game Share	Top 20 Share	Rest of Market
Party	81.0%	15.0%	
Other	75.6%	20.5%	
Shooting	58.2%	34.7%	7.1%
Action	53.1%	34.0%	12.9%
Match	43.6%	35.1%	21.3%
Racing	42.5%	41.2%	16.3%
Sports	38.0%	35.8%	26.2%
Simulation	35.1%	23.2%	41.7%
Tabletop	34.5%	38.3%	27.2%
Kids	33.9%	16.9%	49.2%
Puzzle	33.9%	29.3%	36.8%
Hypercasual	19.8%	32.9%	47.3%
Strategy	14.9%	42.4%	42.7%
Casino	12.2%	34.2%	53.5%
RPG	12.1%	28.3%	59.6%

Share of Consumer Spend by Time Since Release

● < 6 Mths ● 6 Mths to 1 Yr ● 1 to 2 Yrs ● > 2 Yrs

Genre	< 6 Mths	6 Mths to 1 Yr	1 to 2 Yrs	> 2 Yrs
Party			40.8%	59.1%
Other				97.3%
Shooting				94.5%
Action				94.4%
Match			8.1%	90.9%
Racing		14.4%	8.8%	76.7%
Sports	8.7%			87.3%
Simulation		20.3%		75.9%
Tabletop				94.6%
Kids		11.2%		87.3%
Puzzle		7.3%		91.2%
Hypercasual	10.0%	56.9%		31.5%
Strategy		20.4%		76.8%
Casino		7.5%		91.9%
RPG	12.5%	23.5%	59.4%	

Top 3 Games

Which Game Subgenres Defy Global Trends?

Top Breakout Gaming Subgenres: 2023 vs 2022

DOWNLOADS

| ‹ | Worldwide ⌄ | › |

#1 Game By Downloads

Subgenre	Value	#1 Game
RPG | Team Battle	191.98M	Honkai: Star Rail
Simulation | Weapon...	151.37M	Gun Simulator & Lightsaber
Puzzle | Tile-Matching	148.42M	Block Blast Adventure Master
Match | Connect Tiles	144.68M	Triple Tile
Strategy | 4X March-Battle	134.47M	Lords Mobile
Hypercasual | Puzzle	-187.49M	Thief Puzzle
Hypercasual | .io	-213.79M	Bridge Race
Simulation | Driving	-216.81M	Indian Bikes Driving 3D
Hypercasual | Action	-415.72M	Attack Hole
Hypercasual | Simulation	-616.68M	My Perfect Hotel

-300M   0

CONSUMER SPEND

| ‹ | Worldwide ⌄ | › |

#1 Game By Consumer Spend

Subgenre	Value	#1 Game
Party | Luck Battle	$1,196.54M	Coin Master
Match | M3-Meta	$1,131.86M	Royal Match
RPG | Team Battle	$487.91M	Honkai: Star Rail
RPG | Idle RPG	$464.59M	Pixel Heroes
Sports | Simulation Sports	$366.74M	Professional Baseball Spirits A
Simulation | Idol Training Sim	-$441.32M	Uma Musume Pretty Derby
RPG | Open World RPG	-$523.83M	Genshin Impact
Shooting | Battle Royale	-$943.08M	Game For Peace
RPG | MMORPG	-$1,006.19M	Lineage M
Strategy | 4X March-Battle	-$1,086.19M	Evony

0   $800M

data.ai | STATE OF MOBILE 2024

Top 20 Global Game Subgenres by Time Spent in 2023

	Worldwide		Share of Total	#1 App
Simulation | Creative Sandbox			13.9%	ROBLOX
Shooting | Battle Royale			9.0%	Free Fire
Action | MOBA			8.5%	Mobile Legends: Bang Bang
Match | M3			4.3%	Candy Crush Saga
Sports | Simulation Sports			3.9%	EA SPORTS FC™ MOBILE 24 SOCCER
Shooting | Team Deathmatch			2.8%	Call of Duty: Mobile
Match | M3-Meta			2.4%	Royal Match
Strategy | 4X March-Battle			1.8%	Lords Mobile
RPG | Team Battle			1.6%	DRAGON BALL LEGENDS
Hypercasual | Puzzle			1.5%	Parking Jam 3D
Tabletop | Solitaire			1.5%	Solitaire - Grand Harvest
Puzzle | Word			1.4%	Words Of Wonders
Simulation | Farming			1.4%	Township
Tabletop | Ludo			1.2%	Ludo King
Simulation | Driving			1.2%	Car Parking Multiplayer
Strategy | Build-Battle			1.2%	Clash of Clans
Tabletop | Coloring			1.1%	Happy Color
Simulation | Avatar Life			1.0%	SAKURA School Simulator
RPG | Location RPG			1.0%	Pokémon GO
Hypercasual | Action			1.0%	Mob Control

Source: data.ai Intelligence | Note: Among gaming apps; Time spent is Android phones only; Based on Game IQ primary categorization as of Jan 4, 2024

GAMING

Creative Sandbox and Genres with Online & Social Features Will Further Drive Global Gaming Time

We expect social and multiplayer gaming features to remain in high demand in 2024 as consumers seek to stay connected with family and friends, even as pandemic measures ease.
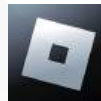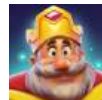
Mobile has enabled core games to become more 'casual' in nature given the device specs and user interface. Yet, mobile phones are powerful enough to stand up to the 'core' game experience and enable cross-platform play.

Connected games are the biggest driver of overall consumer spend in mobile games and we predict will be a key area of growth in 2024 and beyond.

Be the first to spot potential breakout apps in your sector with detailed genres and subgenres from data.ai's Game IQ Taxonomy

2023 Top Games & Breakout Rankings by Market | Games

AMER – Downloads

	Worldwide	United States	Canada	Mexico	Brazil	Argentina	Colombia	Chile	Peru
1	Subway Surfers (Action | Runner)	Monopoly GO: Family Board Game (Party | Luck Battle)	Monopoly GO: Family Board Game (Party | Luck Battle)	Free Fire (Shooting | Battle Royale)	ROBLOX (Simulation | Creative Sandbox)	ROBLOX (Simulation | Creative Sandbox)	Free Fire (Shooting | Battle Royale)	ROBLOX (Simulation | Creative Sandbox)	Free Fire (Shooting | Battle Royale)
2	Free Fire (Shooting | Battle Royale)	Gacha Life 2 (Simulation | Avatar Life)	ROBLOX (Simulation | Creative Sandbox)	ROBLOX (Simulation | Creative Sandbox)	Free Fire (Shooting | Battle Royale)	Free Fire (Shooting | Battle Royale)	ROBLOX (Simulation | Creative Sandbox)	Block Blast Adventure Master (Puzzle | Tile-Matching)	ROBLOX (Simulation | Creative Sandbox)
3	ROBLOX (Simulation | Creative Sandbox)	ROBLOX (Simulation | Creative Sandbox)	Block Blast Adventure Master (Puzzle | Tile-Matching)	Subway Surfers (Action | Runner)	Subway Surfers (Action | Runner)	Stumble Guys (Party | Party Royale)	Subway Surfers (Action | Runner)	Free Fire (Shooting | Battle Royale)	Ludo Club (Tabletop | Ludo)
4	Ludo King (Tabletop | Ludo)	Royal Match (Match | M3-Meta)	Chess.com (Tabletop | Chess)	Stumble Guys (Party | Party Royale)	Gacha Life 2 (Simulation | Avatar Life)	Subway Surfers (Action | Runner)	Parchisi STAR (Tabletop | Board Game)	Royal Match (Match | M3-Meta)	Stumble Guys (Party | Party Royale)
5	Candy Crush Saga (Match | M3)	Honkai: Star Rail (RPG | Team Battle)	Wordscapes (Puzzle | Word)	My Perfect Hotel (Hypercasual | Simulation)	Stumble Guys (Party | Party Royale)	EA SPORTS FC™ MOBILE 24 SOCCER (Sports | Simulation Sports)	8 Ball Pool (Sports | Simulation Sports)	Stumble Guys (Party | Party Royale)	Candy Crush Saga (Match | M3)

Download data

Finance

Consumers feel the financial pressure: personal loans on the rise as crypto trading and investing growth stalls. The lines between different subgenres continues to blur as "super apps" add new features.

"

Building the Allstate of the future means making sure customers can do business with us whenever and however they choose, and the Allstate mobile app helps us deliver on that commitment with a competitive, personalized digital experience. Whether it's making it easy to find parking, fuel, and repair shops to offering innovative safe driving tools like Drivewise and crash detection services, we're continually enhancing the Allstate mobile app to give customers more ways to seamlessly connect with their coverage and protect what matters most.

Mike Antognoli
Allstate Mobile Product Director

Allstate

Finance Subgenre App Downloads by Country

Powered by data.ai's **App IQ** Taxonomy
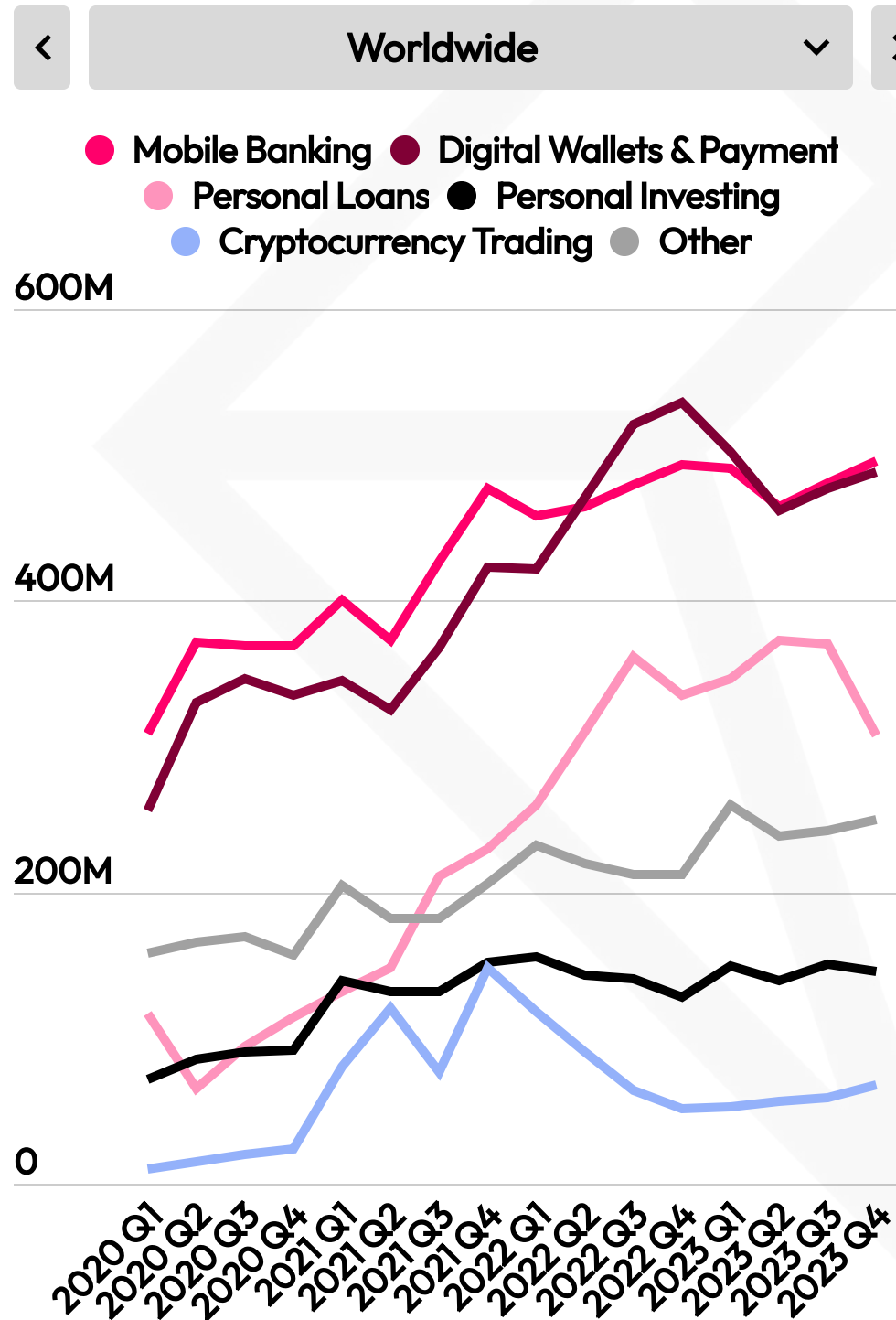
	Worldwide	

- ● Mobile Banking
- ● Digital Wallets & Payment
- ● Personal Loans
- ● Personal Investing
- ● Cryptocurrency Trading
- ● Other

600M
400M
200M
0

2020 Q1 · 2020 Q2 · 2020 Q3 · 2020 Q4 · 2021 Q1 · 2021 Q2 · 2021 Q3 · 2021 Q4 · 2022 Q1 · 2022 Q2 · 2022 Q3 · 2022 Q4 · 2023 Q1 · 2023 Q2 · 2023 Q3 · 2023 Q4

Top Apps by Downloads in 2023

	App	Subgenre
1	PhonePe	Digital Wallets & Payment
2	Paytm	Digital Wallets & Payment
3	PayPal	Digital Wallets & Payment
4	Google Pay	Digital Wallets & Payment
5	Alipay	Digital Wallets & Payment
6	Nubank	Mobile Banking
7	Binance	Cryptocurrency Trading
8	Bajaj Finserv	Personal Loans
9	DANA	Digital Wallets & Payment
10	Google Wallet	Digital Wallets & Payment

FINANCE

Consumers Embrace Mobile for their Finance Needs from Banking to Payment

Mobile app adoption across top subgenres like Mobile Banking and Digital Wallets & Payment continued to climb as consumers continue to turn to their mobile devices more than ever for their finance needs.

Meanwhile, Personal Loans app adoption remained strong as economic headwinds continued in 2023. The prevalence is highly regional, however, with much of the growth driven by markets like India, Indonesia, and Mexico.

The dip in Cryptocurrency Trading leveled off in 2023 after seeing a pronounced downturn in 2022. Unsurprisingly, downloads tend to track with the turbulence in the cryptocurrency market.

Want to see which markets are emerging for each subgenre? data.ai's Market Size lets you keep up with the latest trends across the globe.

Know Your Market — Local Publishers Dominate their Mobile Finance Markets

Understanding each country's unique financial rules and regulations — plus the unique consumer needs for each market — gives local-based publishers a major leg up in the finance space.

The local advantage particularly strong in China, Japan, South Korea and the United States. Most markets have seen the share from outside publishers pick up a bit in recent years, though India and Indonesia are notable exceptions as their mobile industries thrive.

Find out which publishers are looking abroad with the Company HQ filter, part of data.ai's Top Apps

Share of Finance Downloads by Local-HQ'd Publishers

AMER | APAC | EMEA

● 2020 ● 2021 ● 2022 ● 2023
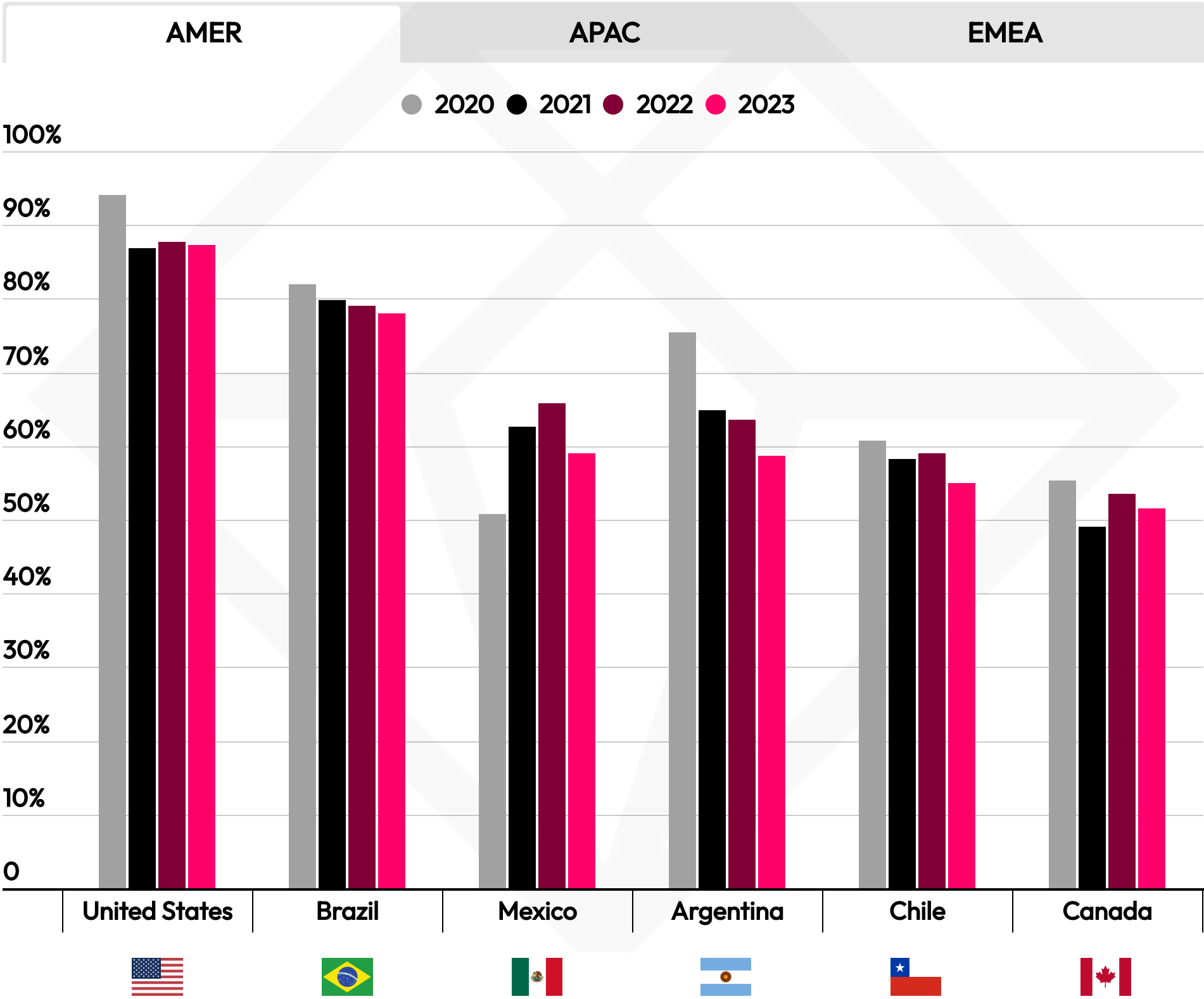
Source: data.ai Intelligence | Note: Downloads across iOS and Google Play; China is iOS only. Finance apps are classified using data.ai's App IQ taxonomy.

Inflation vs. Personal Loan Downloads

< | Worldwide ⌄ | >

● Inflation (CPI)   ● Personal Loan Downloads
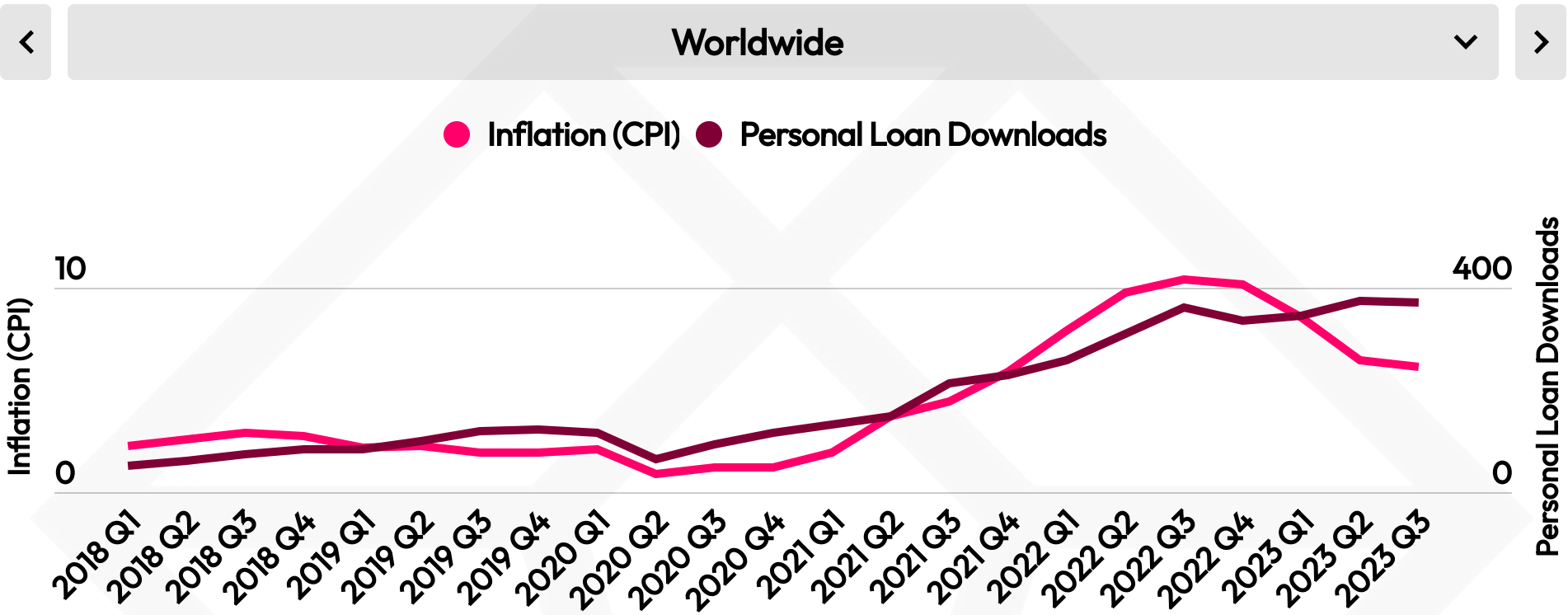
Correlation Between Inflation and Finance Subgenre Downloads Q1 2018 – Q3 2023

0.90	0.77	0.83	0.71	0.56	0.79	0.72	0.66	0.30	0.52	0.73	0.78
Personal Loans	Mobile Banking	Digital Wallets & Payment	Personal Investing	Cryptocurrency Trading	Insurance	Other Finance	Budget & Expense Tracker	Financial News	Personal Taxes	Credit Score	Donation
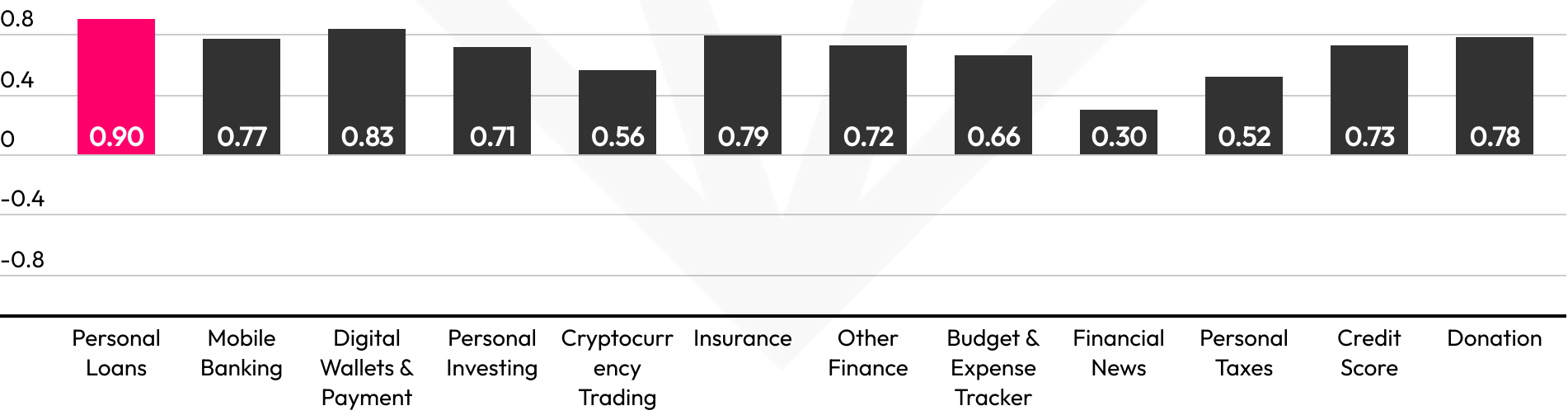
Source: data.ai Intelligence | Note: Downloads across iOS, Google Play; China is iOS only. Apps are classified using data.ai's App IQ taxonomy. Inflation is from the OECD.

FINANCE

Personal Loans is the Fastest Growing Subgenre as Inflation Remains High

While most subgenres saw downloads rise along with high inflation over the past few years, no subgenre saw a higher correlation than Personal Loans. The scale of the growth was also notable — global downloads for Personal Loans apps climbed more than 250% between 2020 and 2023, even outpacing Cryptocurrency's 238% growth over the same period.

Personal Loans downloads don't have the highest correlation with inflation in all markets, though it tends to be high throughout. In Europe, for example, Personal Loans apps saw strong growth even though gross totals for the subgenre remained quite low.

With more than 800,000 apps classified, data.ai's App IQ taxonomy gives you the power to dive deeper into the impacts of the global economy on the app ecosystem

Finance "Super Apps" Use Multiple Useful Features to Maintain Market Share

In a competitive mobile market, top finance apps have continued to add new features to incentivize customers turning to their app for all finance needs, from mobile banking to sending money to trading in crypto. Super apps have become particularly popular in China, with Alipay as a prime example.

data.ai's Feature Tags reveals that all of the top markets have at least one app with four or more of the features listed here, and several including the US, UK, China and Brazil have three or more such apps. These apps tend to be market leaders in the finance space. In fact, these super apps control more than 20% of the Finance monthly active user base in China (47%), the US (32%) and Argentina (24%).

Another component of data.ai's App IQ taxonomy is the feature tags — with 20 different features tagged specific to the Finance genre alone. Filter by different features to see what is helping apps stay on top.

Features for Finance "Super Apps"

United States

App	Subgenre	Bill Pay	Budget Planner	Buy/Sell Crypto	Contactless Payment	Donation Facilitation	Investment Recs	Mobile Deposit	QR Code Payment	Request Money	Send Money
PayPal	Digital Wallets & Payment	✓		✓	✓	✓		✓	✓	✓	✓
Google Pay	Digital Wallets & Payment				✓				✓	✓	✓
Alipay	Digital Wallets & Payment	✓			✓	✓			✓	✓	✓
Nubank	Mobile Banking	✓				✓			✓	✓	✓
DANA	Digital Wallets & Payment	✓							✓	✓	✓

Features for Finance "Super Apps"
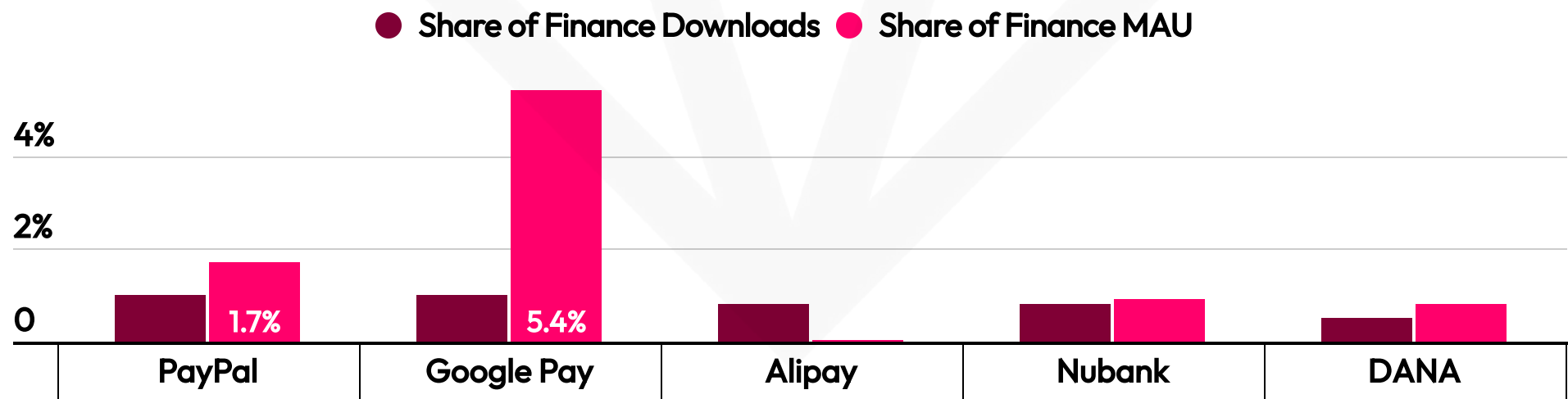
● Share of Finance Downloads ● Share of Finance MAU

Bar chart labels: PayPal 1.7%, Google Pay 5.4%, Alipay, Nubank, DANA. Y-axis: 0, 2%, 4%.

2023 Rankings by Market | Finance

AMER - Breakout Downloads

	Worldwide	United States	Canada	Mexico	Brazil	Argentina	Colombia	Chile	Peru
1	B-Love Network (Finance | Other Finance)	CoinSnap: Value Guide (Finance | Other Finance)	RBC Mobile (Finance | Mobile Banking)	Banco del Bienestar Movil (Finance | Mobile Banking)	Nubank (Finance | Mobile Banking)	Mercado Pago (Finance | Digital Wallets & Payment)	Nequi Colombia (Finance | Mobile Banking)	TAPP Caja Los Andes (Finance | Digital Wallets & Payment)	CrediSol–Préstamo de crédito (Finance | Personal Loans)
2	Alipay (Finance | Digital Wallets & Payment)	Schwab (Finance | Personal Investing)	CoinSnap: Value Guide (Finance | Other Finance)	DiDi Préstamos (Finance | Personal Loans)	SerasaConsumidor (Finance | Credit Score)	Naranja X (Finance | Digital Wallets & Payment)	Davivienda (Finance | Mobile Banking)	CencoPay (Finance | Digital Wallets & Payment)	Sol Ya-Préstamo de Perú (Finance | Personal Loans)
3	Navi (Finance | Personal Loans)	Google Wallet (Finance | Digital Wallets & Payment)	Remitly (Finance | Digital Wallets & Payment)	Súper Efectivo (Finance | Personal Loans)	Valores a Receber - Guia 2023 (Finance | Other Finance)	AstroPay (Finance | Digital Wallets & Payment)	LuckyPlata – Préstamo en línea (Finance | Personal Loans)	Santander Chile (Finance | Mobile Banking)	Banca Móvil BCP (Finance | Mobile Banking)
4	Cryptomania —Trading Simulator (Finance | Cryptocurrency Trading)	Chime (Finance | Mobile Banking)	Beneva (Finance | Insurance)	BBVA México (Finance | Mobile Banking)	PicPay (Finance | Mobile Banking)	YOY (Finance | Digital Wallets & Payment)	Lulo Bank (Finance | Mobile Banking)	BancoEstado (Finance | Mobile Banking)	Bim (Finance | Digital Wallets & Payment)
5	OPay (Finance | Digital Wallets & Payment)	UnitedHealthcare (Finance | Insurance)	Google Wallet (Finance | Digital Wallets & Payment)	Viva CréDito - Préstamos Urgente Y Rápidos (Finance | Personal Loans)	Novo App Riocard Mais (Finance | Digital Wallets & Payment)	World App - Worldcoin Wallet (Finance | Cryptocurrency Trading)	Préstamo Rápido-Credit Easy (Finance | Personal Loans)	Deseo Crédito-préstamo (Finance | Personal Loans)	OK Préstamo-Préstamo Rápido (Finance | Personal Loans)

Top Features Loved by Finance

App IQ

Cross-App Usage
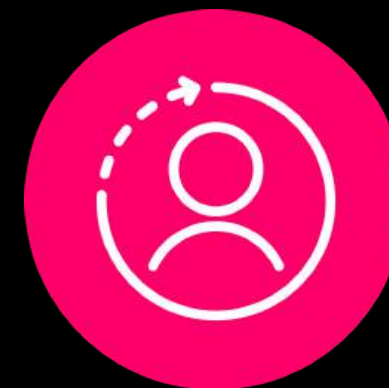
Extended Retention

Ratings and Reviews

Retail

Personalization, optimized experience, frictionless checkout: mobile shopping apps bridge in-person and at-home shopping experiences.

Annual Hours Spent in Shopping Apps

100B
80B
60B
40B
20B
0

2020   2021   2022   2023

Year-over-Year Growth

20%
15%
10%
5%
0

2021   2022   2023
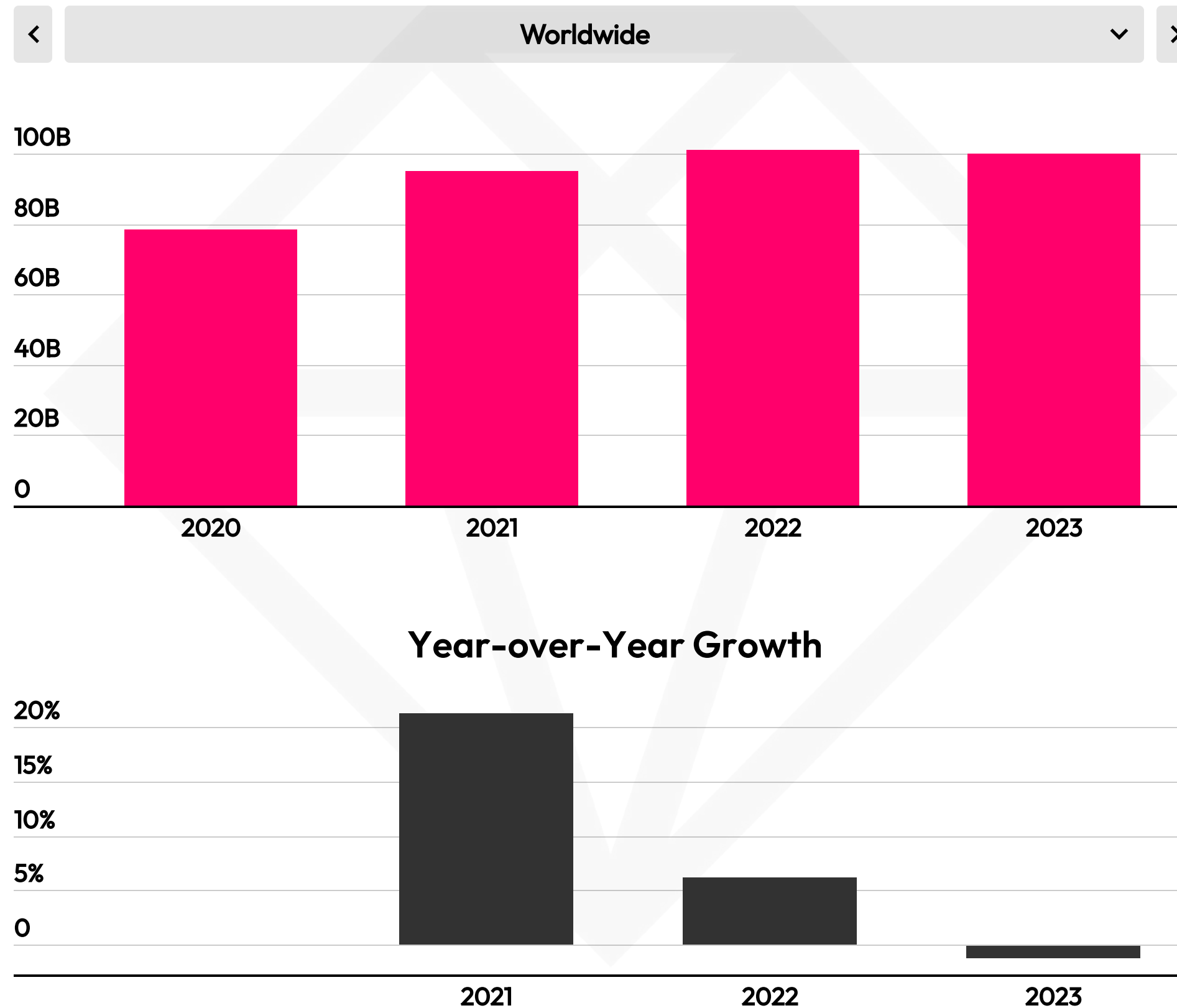
Source: data.ai Intelligence | Note: Android Phones. Shopping apps are classified using data.ai's App IQ taxonomy.

RETAIL

Mobile Shopping Time Spent Remains Well Above Pre-Pandemic Levels

The economic headwinds, combined with a natural contraction from the huge mobile growth seen early in the pandemic, led to a slight dip in total time spent in Shopping apps. Total hours declined 1% year-over-year in 2023, though it was still up more than 25% compared to 2020.

While some of the largest retail markets like China and the United States saw a dip in time spent in 2023, other markets bucked this trend. The leaders by YoY growth were Brazil (+31%), Australia (+13%), and Mexico (+7%).

Want to dive deeper?
Discover the top performers by engagement depth, usage stickiness and more with data.ai's
Insights Generator

Shopping Subgenre Year-over-Year Download Growth by Market in 2023

Worldwide

Supermarket & Convenience Store
Retailer Store
Resell
Coupons & Rewards
Pharmacy & Drugstore
Malls & Shopping Centers
E-Commerce
BNPL
Other Shopping

0   5%   10%   15%
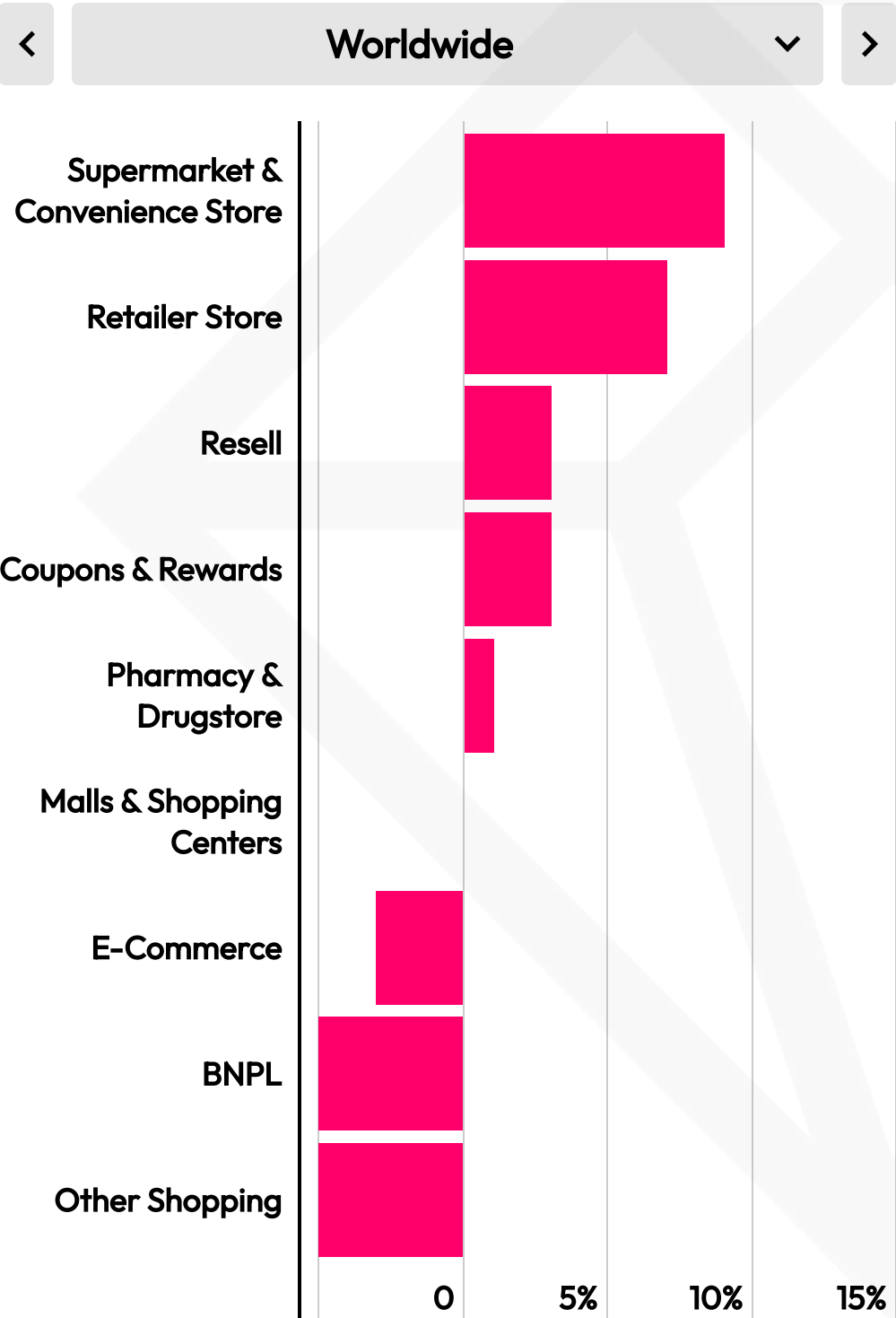
Top Apps by Breakout Downloads in 2023

	App	Subgenre
1	Temu	E-Commerce
2	SHEIN	E-Commerce
3	AliExpress	E-Commerce
4	Tiktok Seller	Retailer Store
5	Poizon	E-Commerce
6	JD.COM	E-Commerce
7	95分	Resell
8	1688.com	E-Commerce
9	LimeRoad	E-Commerce
10	Wildberries	E-Commerce

RETAIL

The Retail Market is Heating Up: Temu Makes a Splash in 2023

Among mobile apps across all genres, only Threads gained more downloads in 2023 compared to 2022 than Temu. The e-commerce app from Chinese PDD Holdings used substantial advertising and low prices to attract new users and become a key player to watch.

E-Commerce apps also face competition from brick & mortar stores, which are capitalizing on the return to in-person shopping to boost mobile adoption. Supermarket & Convenience Store and Retailer Store apps saw year-over-year download growth at 9% and 7%, respectively, well ahead of E-Commerce's -7% annual growth.

For brick & mortar retailers, it is clear that failing to embrace a mobile shopping experience puts you at a disadvantage.

Temu's massive advertising push in 2023 propelled it to the top of the charts. data.ai customers can use Download Channel data to find out how paid vs. organic channels contributed to adoption.

Source: data.ai Intelligence | Note: Downloads across iOS, Google Play; China is iOS only. Shopping apps are classified using data.ai's App IQ taxonomy. Subgenres with less than 15,000 downloads in the prior year are excluded. Breakout apps are defined by gross download growth in 2023 compared to 2022.

Going Global: SHEIN and Temu Break into Markets Across the Globe

The United States has long been the home to some of the biggest retailers like Amazon, Walmart and eBay. However, the emergence of some Asia-based e-commerce platforms had contributed to the US losing market share over the past few years.

Temu's massive global launch in 2023 helped China gain 3.4 percentage points in market share compared to 2020. Singapore-based SHEIN has also had a strong presence in recent years across top retail markets.

data.ai customers can find out where the top Shopping apps are from in your local market with Top Charts
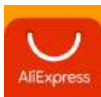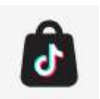
Share of Shopping App Downloads by Publisher Headquarters
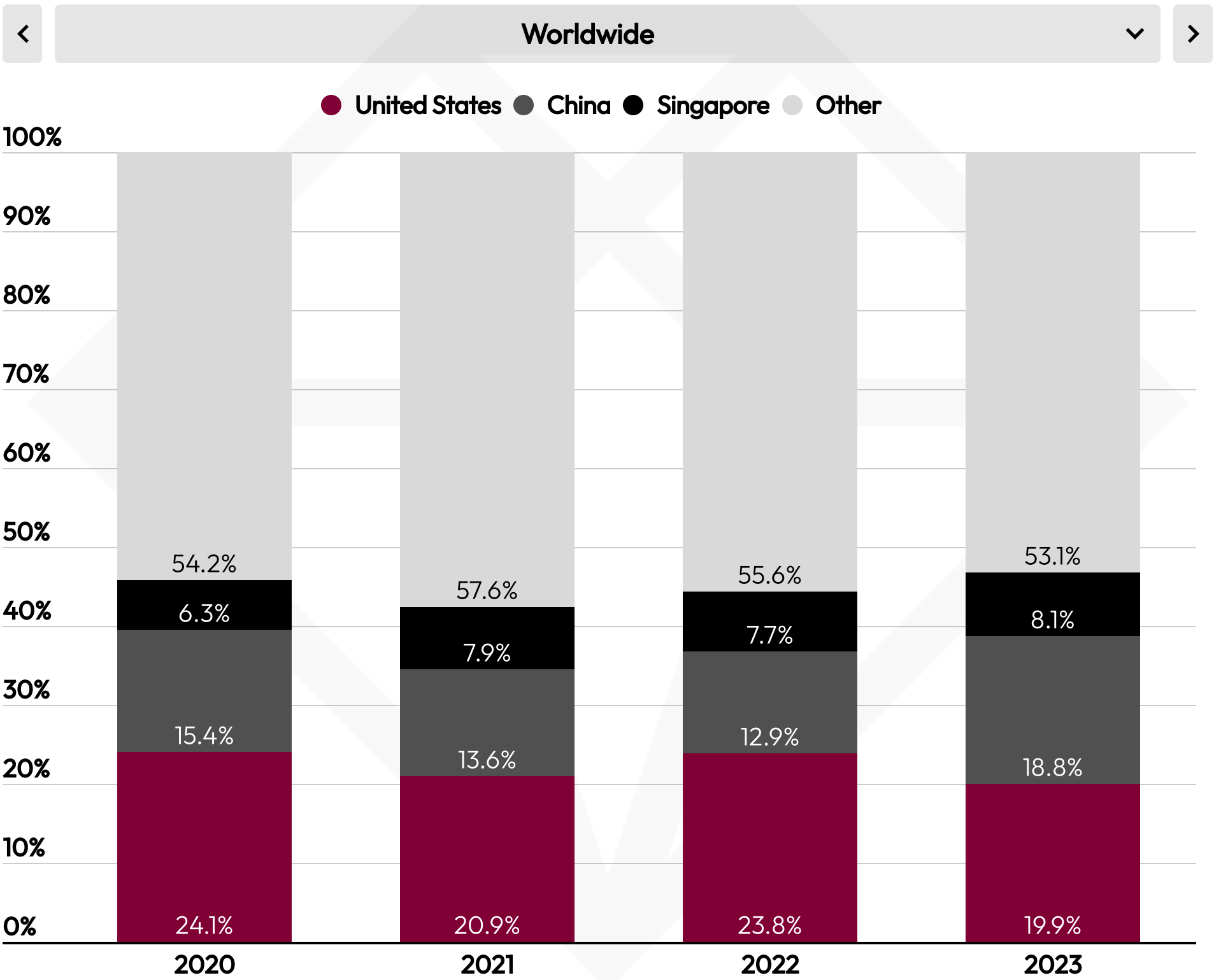
< **Worldwide** ∨ >

● United States ● China ● Singapore ● Other

	2020	2021	2022	2023
Other	54.2%	57.6%	55.6%	53.1%
Singapore	6.3%	7.9%	7.7%	8.1%
China	15.4%	13.6%	12.9%	18.8%
United States	24.1%	20.9%	23.8%	19.9%

Source: data.ai Intelligence | Note: Downloads across iOS, Google Play; China is iOS only. Shopping apps are classified using data.ai's App IQ taxonomy.

data.ai | STATE OF MOBILE 2024

2023 Rankings by Market | Shopping

AMER - Breakout Downloads

	Worldwide	United States	Canada	Mexico	Brazil	Argentina	Colombia	Chile	Peru
1	Temu (Shopping | E-Commerce)	Temu (Shopping | E-Commerce)	Temu (Shopping | E-Commerce)	Temu (Shopping | E-Commerce)	SHEIN (Shopping | E-Commerce)	Alibaba.com (Shopping | E-Commerce)	Falabella (Shopping | E-Commerce)	Temu (Shopping | E-Commerce)	Mifarma Movil (Shopping | Pharmacy & Drugstore)
2	SHEIN (Shopping | E-Commerce)	SHEIN (Shopping | E-Commerce)	SHEIN (Shopping | E-Commerce)	SHEIN (Shopping | E-Commerce)	Amazon (Shopping | E-Commerce)	MercadoLibre (Shopping | E-Commerce)	AliExpress (Shopping | E-Commerce)	Ripley: Compras Online (Shopping | E-Commerce)	Ripley Perú: Compras Online (Shopping | Retailer Store)
3	Red – Shop the World (Social Media | Media Sharing Networks)	Capital One Shopping (Shopping | Coupons & Rewards)	Michaels Stores Canada (Shopping | Retailer Store)	Coppel (Shopping | Retailer Store)	AliExpress (Shopping | E-Commerce)	Temu (Shopping | E-Commerce)	SHEIN (Shopping | E-Commerce)	AliExpress (Shopping | E-Commerce)	Falabella (Shopping | E-Commerce)
4	AliExpress (Shopping | E-Commerce)	Circle K by Circle K North America (Shopping | Supermarket & Convenience Store)	Sephora (Shopping | Retailer Store)	AliExpress (Shopping | E-Commerce)	Magazine Luiza (Shopping | E-Commerce)	Natura Latam (Shopping | E-Commerce)	Temu (Shopping | E-Commerce)	Farmacias Cruz Verde Chile (Shopping | Pharmacy & Drugstore)	SHEIN (Shopping | E-Commerce)
5	Tiktok Seller	Walmart (Shopping |	Jean Coutu et Moi	Alibaba.com	Assaí Clientes (Shopping |	AliExpress (Shopping |	Alibaba.com	Alibaba.com	Real Plaza by Real Plaza (Shopping |

Top Features Loved by Retail

Creative Gallery

App IQ

Ratings & Reviews

Download Channel

Usage & Engagement

Video Streaming

TikTok encroaches on the video streaming space: User-Generated Content captures mobile-first audiences alongside exclusive content releases.

'With its unparalleled capabilities, we have harnessed the power of data to drive innovation, make informed decisions, and stay one step ahead in today's competitive landscape. Through our partnership with data.ai, we have unlocked valuable insights, optimized processes, and achieved remarkable growth.

Dor Isseroff
COO

tango

Yearly OTT Consumer Spend by Market
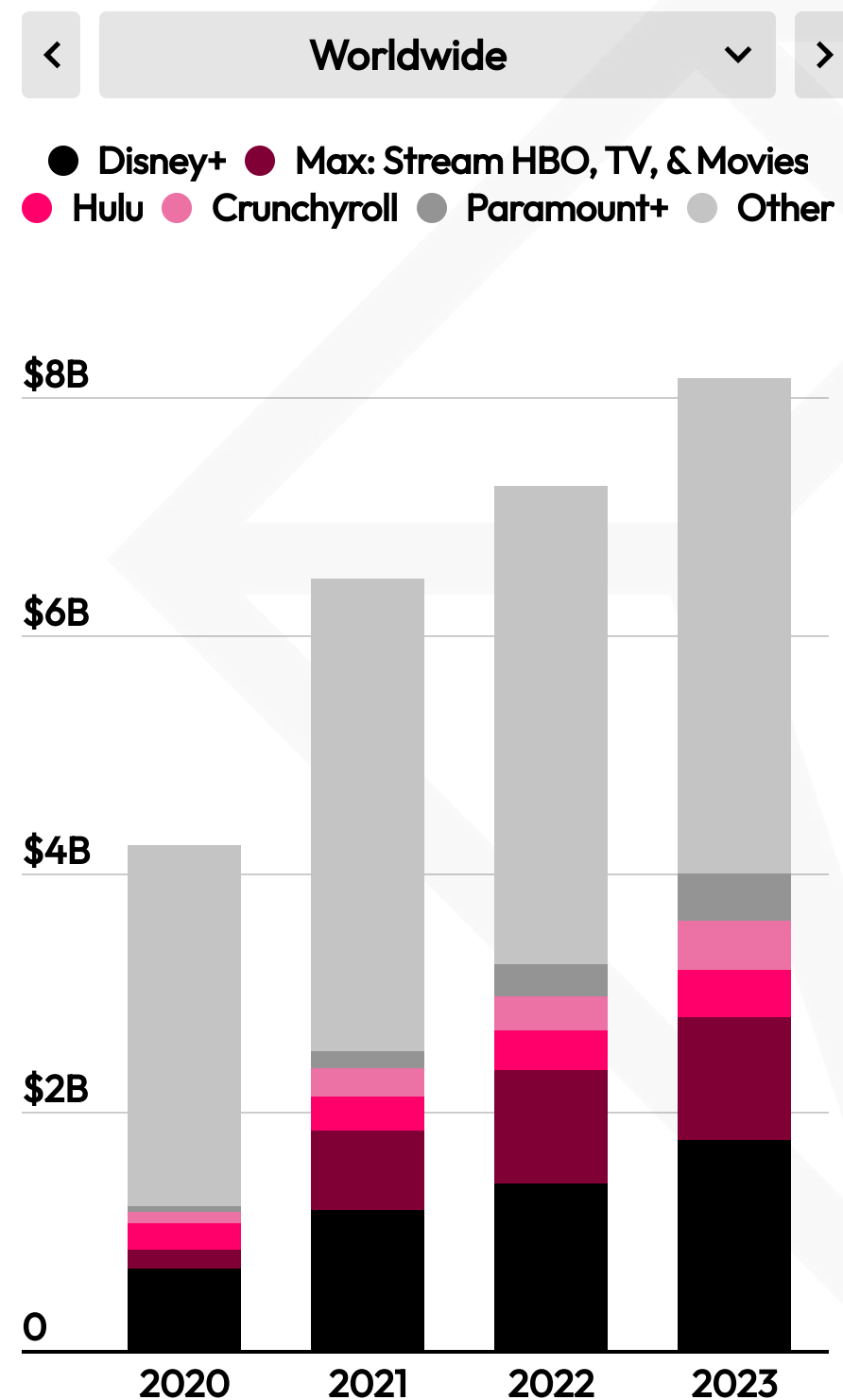
OTT Revenue Growth vs. Market Concentration (Herfindahl-Hirschman Index)
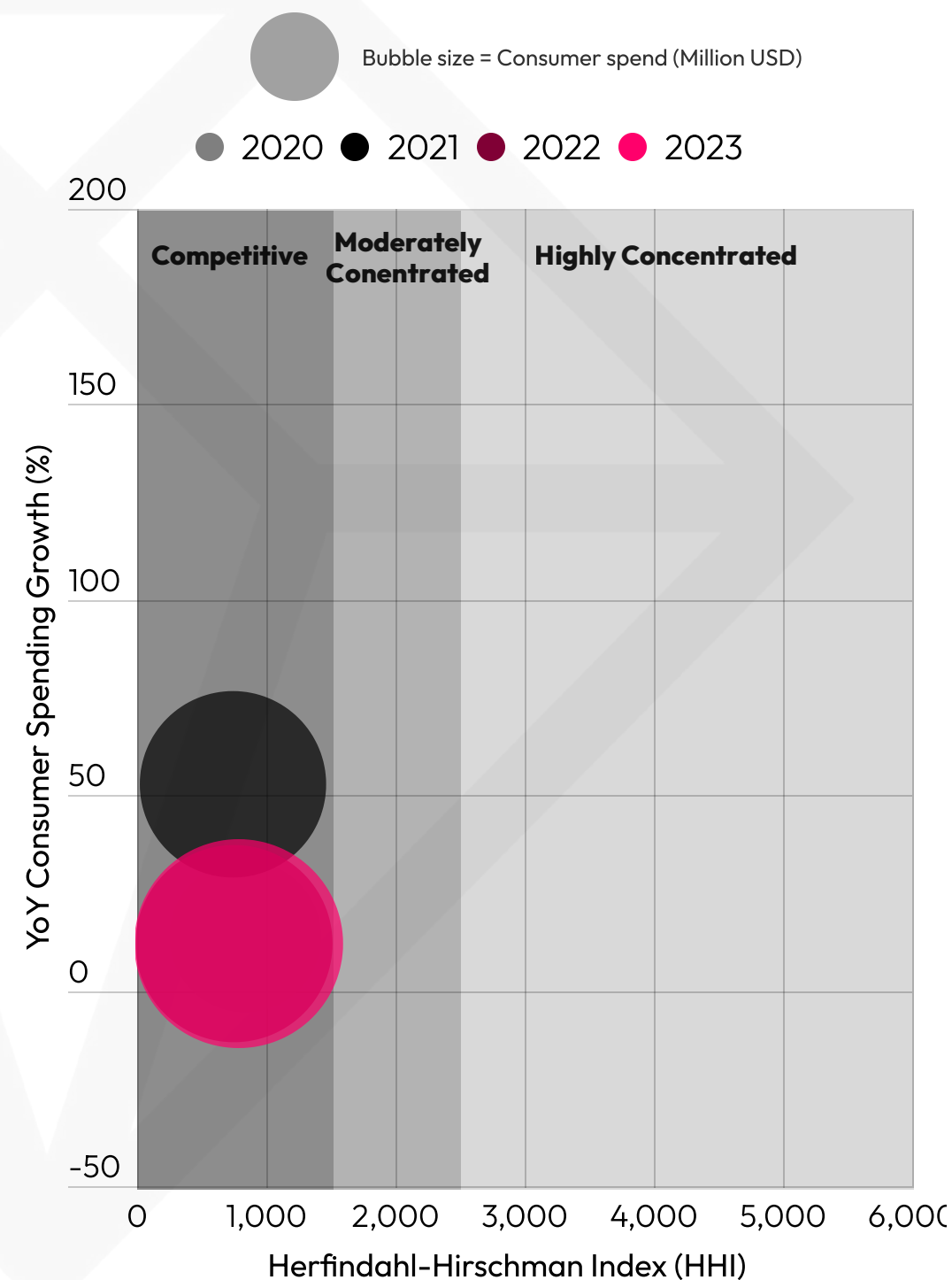
The Streaming Battle: Strong Revenue Growth Suggests Market is not Oversaturated

Consumer spend in OTT (over-the-top) streaming apps climbed 13% globally in 2023 to surpass $8 billion in 2023, an slight acceleration from the 12% growth in 2022.

This growth came even as the market became a little less competitive. The top five streamers combined for nearly 50% of the market in 2023, up from 45% in 2022. Disney+, the top app each of the past four years, gained even more market share as well.

Some countries have become more competitive in recent years as apps like Disney+ and Max expand into new markets. Brazil, for example, has seen consumer spend grow more than 230% since 2020 as apps like Max, Disney+, Crunchyroll, and Star+ joined the market leader Globo Play.

Disney+ has found success across the globe, earning at least $1 million in consumer spend in more than 50 different markets. data.ai customers can see the full breakdown of Disney+'s performance here.

Share of OTT Consumer Spend by Price on iOS

● $0 - $9.99 ● $10 - $14.99 ● $15 - $24.99
● $25 - $99.99 ● $100+

Share of OTT Consumer Spend by Subscription vs. One-Time Purchases on iOS

● Subscription ● One-Time Purchase

Source: data.ai Intelligence | Note: Consumer Spend is iOS only. OTT apps are classified using data.ai's App IQ taxonomy.

VIDEO STREAMING

Streaming Services Adjust Subscription Offerings for Cost-Conscious Customers

Increasing competition from the abundance of streaming options has prompted top apps to adjust their prices to changing consumer demands.

The share of US consumer spend from in-app purchases priced less than $15 has climbed 7 percentage points since the start of 2022. While top apps have gradually increased prices over time, tighter budgets for many consumers in 2023 have forced apps to get creative with their monetization.

Netflix added an ad-based option in late 2022, and Disney+ and Hulu are raising the monthly price of their ad-free options while leaving the ad-supported tier price unchanged.

Want to see how updated pricing or ad-supported options are impacting an app's revenue? data.ai's IAP SKU pulls back the curtain on revenue from individual IAPs.

2023 Rankings by Market | Video Streaming

	AMER - Downloads	AMER - Consumer Spend	APAC - Downloads	APAC - Consumer Spend	EMEA - Downloads	EMEA - Consumer Spend		
	Worldwide	United States	Canada	Mexico	Brazil	Argentina	Colombia	Chile	Peru
1	YouTube (Entertainment | Video Sharing)	Max: Stream HBO, TV, & Movies (Entertainment | OTT)	Amazon Prime Video (Entertainment | OTT)	PrendeTV: TV en Español (Entertainment | OTT)	YouTube (Entertainment | Video Sharing)	Star+ (Entertainment | OTT)	Netflix (Entertainment | OTT)	Star+ (Entertainment | OTT)	Netflix (Entertainment | OTT)
2	Netflix (Entertainment | OTT)	Netflix (Entertainment | OTT)	Disney+ (Entertainment | OTT)	Netflix (Entertainment | OTT)	Netflix (Entertainment | OTT)	Netflix (Entertainment | OTT)	PrendeTV: TV en Español (Entertainment | OTT)	Pluto.tv (Entertainment | OTT)	PrendeTV: TV en Español (Entertainment | OTT)
3	JioCinema (Entertainment | OTT)	YouTube (Entertainment | Video Sharing)	Netflix (Entertainment | OTT)	YouTube (Entertainment | Video Sharing)	Pluto.tv (Entertainment | OTT)	Pluto.tv (Entertainment | OTT)	YouTube (Entertainment | Video Sharing)	Max: Stream HBO, TV, & Movies (Entertainment | OTT)	Disney+ (Entertainment | OTT)
4	Amazon Prime Video (Entertainment | OTT)	Peacock TV (Entertainment | OTT)	YouTube (Entertainment | Video Sharing)	Disney+ (Entertainment | OTT)	Globo Play (Entertainment | OTT)	Disney+ (Entertainment | OTT)	Disney+ (Entertainment | OTT)	Disney+ (Entertainment | OTT)	Star+ (Entertainment | OTT)
5	YouTube Kids (Entertainment | Video Sharing)	Amazon Prime Video (Entertainment | OTT)	Pluto.tv (Entertainment | OTT)	Max: Stream HBO, TV, & Movies (Entertainment | OTT)	Amazon Prime Video (Entertainment | OTT)	Amazon Prime Video (Entertainment | OTT)	Pluto.tv (Entertainment | OTT)	Netflix (Entertainment | OTT)	Pluto.tv (Entertainment | OTT)

Source: data.ai Intelligence | Note: Top Apps by yearly Downloads and Consumer Spend across iOS, Google Play.
Video Streaming apps are classified from Entertainment – 'OTT','Live Streaming','Video Sharing' subgenres using data.ai's App IQ taxonomy as of Jan 4, 2024.

Social

Disrupting social media: "tipping" content creators carves out social media monetization pathways outside of advertising.

In a market that is so saturated with multiple apps in every genre you need to articulate your differentiation and value. First and foremost, focus on the user. Build a platform that is focused primarily on your users and iterate on the features and benefits of that platform based off of the ones that are most used, most liked, most loved, so that the people you're bringing in then ultimately have higher retention rates and stick around and add value to your business overall.

David Lee
Head of Apps, Global Business Solutions – North America

TikTok

Global Metrics for Social Apps
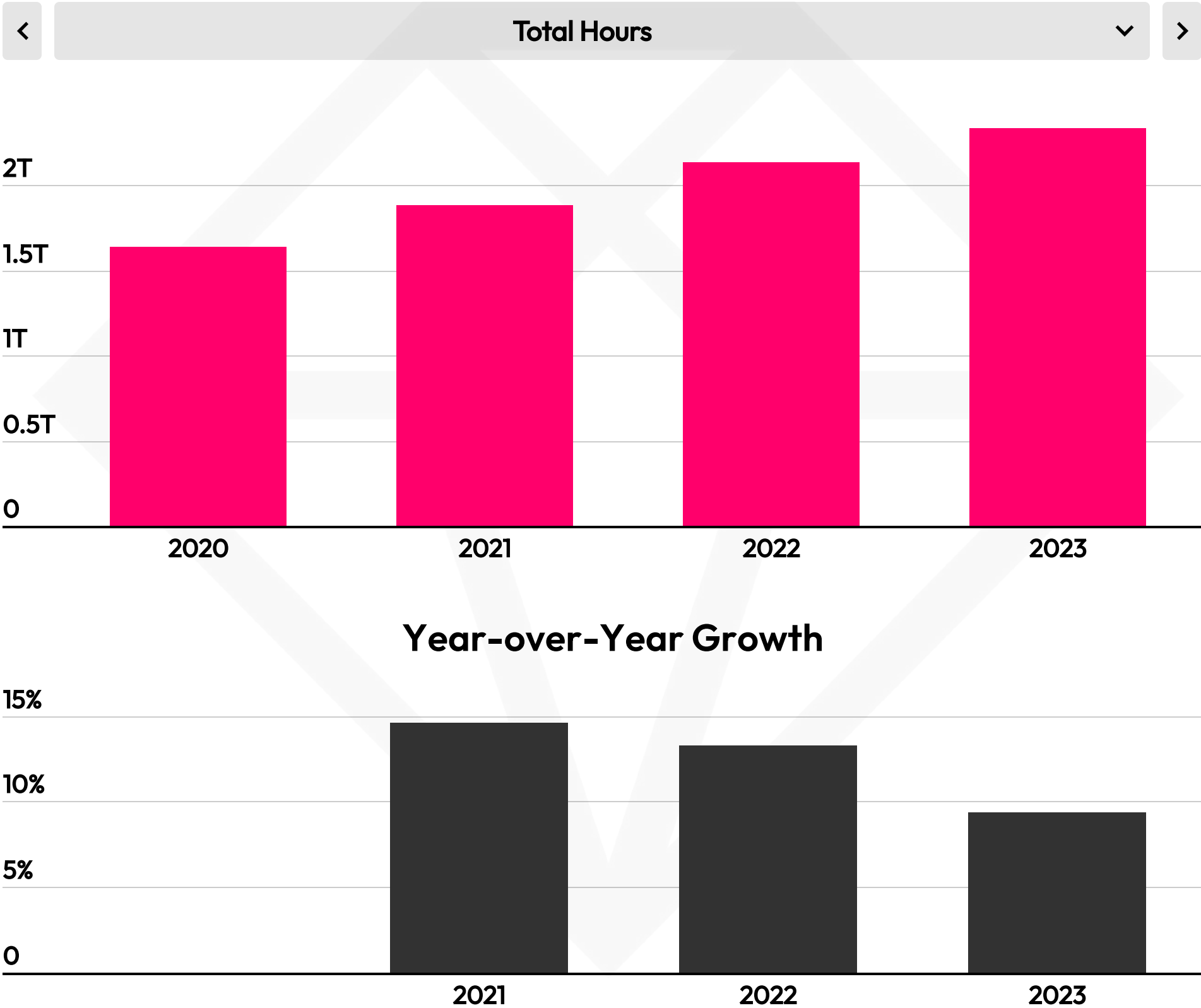
Total Hours `<` `>`

Year	Total Hours
2020	~1.55T
2021	~1.75T
2022	~2.1T
2023	~2.3T

(y-axis: 2T, 1.5T, 1T, 0.5T, 0)

Year-over-Year Growth

Year	Growth
2021	~14%
2022	~12%
2023	~9%

(y-axis: 15%, 10%, 5%, 0)

Source: data.ai Intelligence | Note: Consumer spend and downloads across iOS, Google Play; China is iOS only. Spend is gross — inclusive of any percent taken by the app stores. Total sessions, total hours and total MB are Android only. Total MB measures the total megabytes of data used by Social apps during the year. Social apps are classified using data.ai's App IQ taxonomy and include Short Videos and Live Streaming apps from the Entertainment genre and exclude Dating.

Time Spent in Social Apps Grows 9% in 2023

Time spent in social apps on Android phones shows no signs of slowing, climbing 9% in 2023 to more than 2.3 trillion hours.

Consumer spend growth also remained strong at 13% year-over-year to nearly $9 billion in 2023. Top social platforms are continuing to unlock monetization strategies outside of advertising, with TikTok, the best app monetizer in the history of the app stores, as a prime example.

Global downloads, on the other hand, declined nearly 4%. This was still impressive as the category maintained most of the strong gains seen in 2022.

Need tips on how to keep up with the shift towards in-app purchase revenue for social apps? Check out our latest Monetization Guide.

Average Annual Monthly Active Users for Social Apps by Subgenre

● Communication ● Short Videos
● Media Sharing Networks ● Social Networks
● MicroBlogging ● Discussion & Forum

Line chart y-axis: 10B, 8B, 6B, 4B, 2B, 0
x-axis: 2020, 2021, 2022, 2023
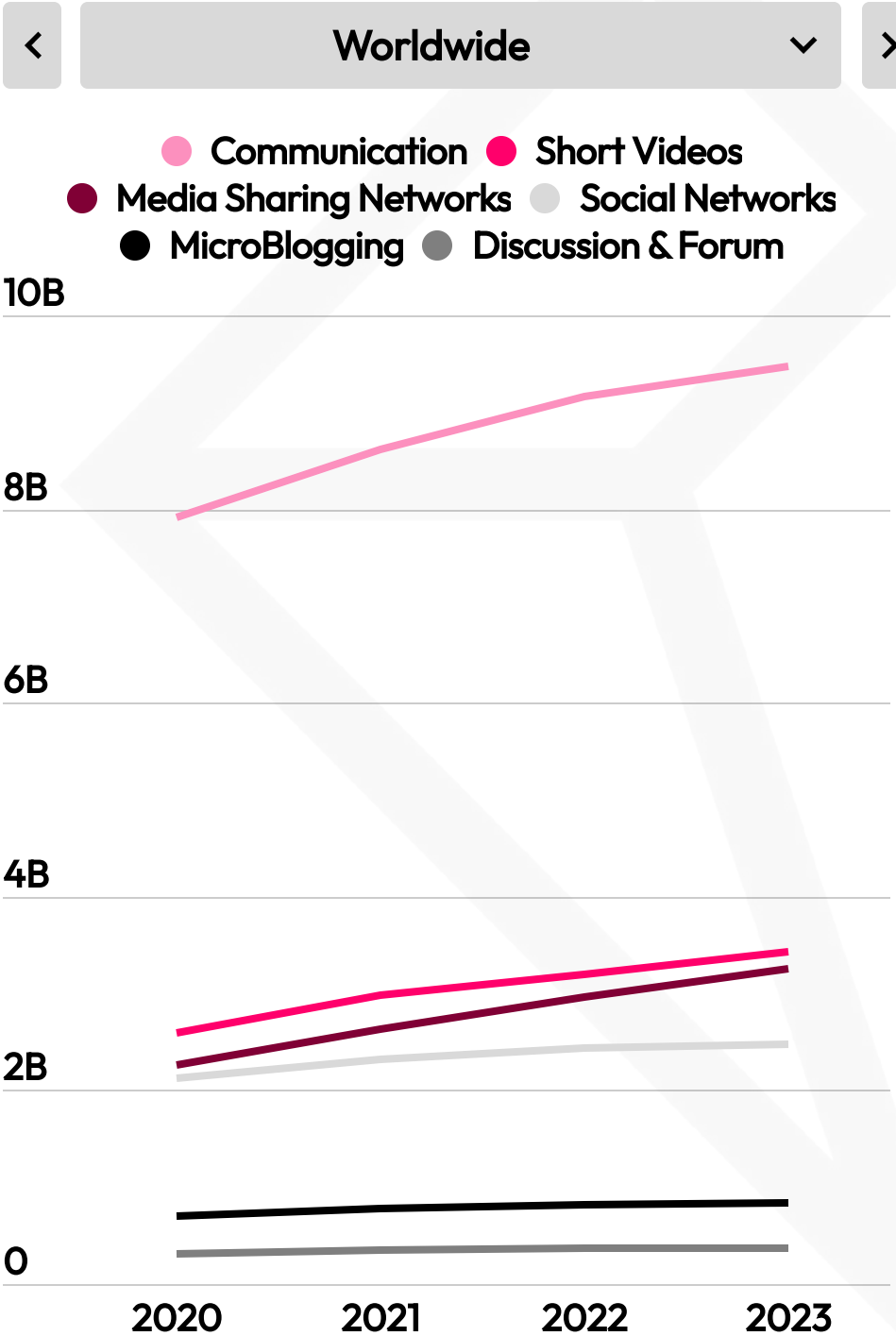
Annual Monthly Active Users Growth Indexed to 2020

● 2020 ● 2021 ● 2022 ● 2023

Bar chart y-axis: 2, 1.5, 1, 0.5, 0
x-axis: Communication, Short Videos, Media Sharing Networks, Social Networks, MicroBlogging, Discussion & Forum

Source: data.ai Intelligence | Note: Monthly active users across iOS, Android. Social apps are classified using data.ai's App IQ taxonomy.
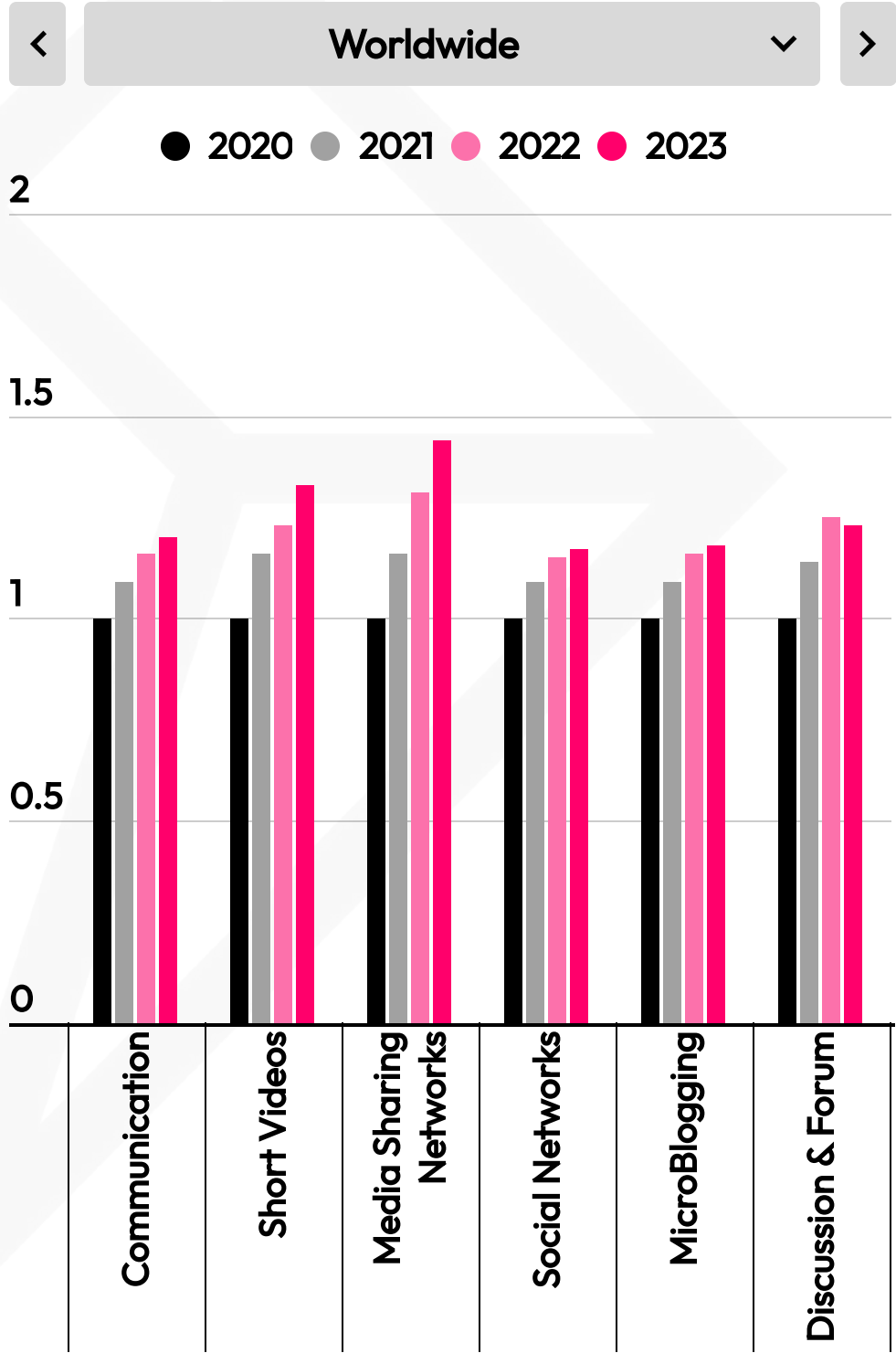
SOCIAL

A New Normal? Social Apps See Headwinds in the US Despite Global Growth

Active user growth remained strong across Social subgenres in 2023. However, results for subgenres in some notable markets like the US, China and the UK was more mixed.

In the United States, for example, average monthly active users for Communication, Social Networks and MicroBlogging apps was below the levels in 2020, and Shorts Videos and Discussion & Forum apps also saw a year-over-year decline.

Mature mobile markets are seeing Social usage stabilize after the rapid increase caused by the start of the pandemic in 2020.

With 164 unique subgenres across 20 genres, data.ai's App IQ taxonomy gives you the granularity you need to analyze the latest trends in the market.

Are Visual-Focused Social Apps Making MicroBlogging Less Relevant?

X's struggles to keep its user-base have been well publicized in 2023. While this has prompted a number of competitors like Threads and Bluesky to launch in 2023, the ceiling for MicroBlogging's market is still in question with many mobile users preferring video-based platforms like TikTok.

Globally, the decline in X usage has been more than offset by growth from competitors like Threads. In the US, however, X competitors have yet to make up for the decline in X's user base and overall MicroBlogging usage declined slightly in 2023.

Keep track of our latest reports on Threads and other breakout apps on our blog

MicroBlogging App Average MAU by Market

| < | Worldwide ⌄ | > |

● X

| < | Worldwide ⌄ | > |

● Sina Weibo   ● Threads   ● Tumblr   ○ Koo
● Other

Left chart (X):
- 600M axis, 400M, 200M, 0
- 2020, 2021, 2022, 2023

Right chart:
- 150M, 100M, 50M, 0
- 2020, 2021, 2022, 2023

Watch TikTok's Rapid Climb to $10 Billion — the First App to Ever Reach This Milestone

TikTok became the first app ever — including games — to reach $10 billion in all-time consumer spend. This milestone seemed impossible only a few years ago. It took nearly 10 years for any non-game app to accumulate just $1 billion in all-time consumer spend. TikTok is now surpassing $1 billion in consumer spend each quarter.

TikTok unlocked the secret to monetization on mobile. The bulk of its in-app purchase revenue comes from coins which can be used to tip creators during live streams.

data.ai customer?

Check out the revenue trajectory for these top apps. Which ones will reach $10 billion next and which ones are losing steam?

Top Apps by Cumulative Consumer Spend Over Time
2013 - 2023

2023 Q4
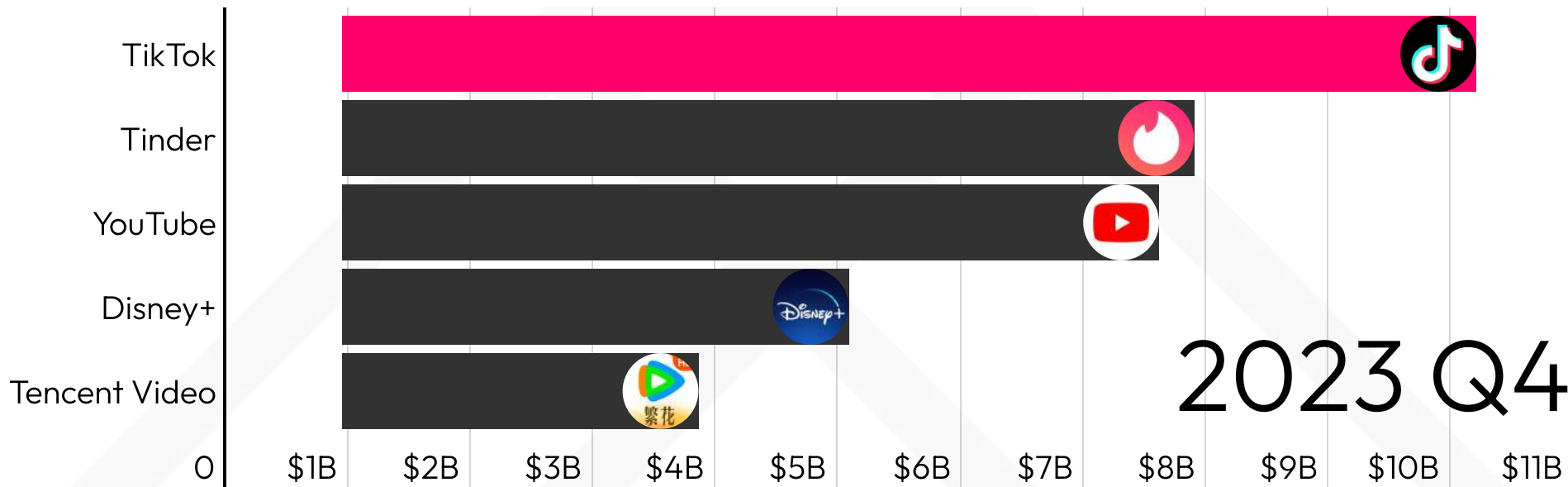
Top Apps by Quarterly Consumer Spend Over Time
2013 - 2023
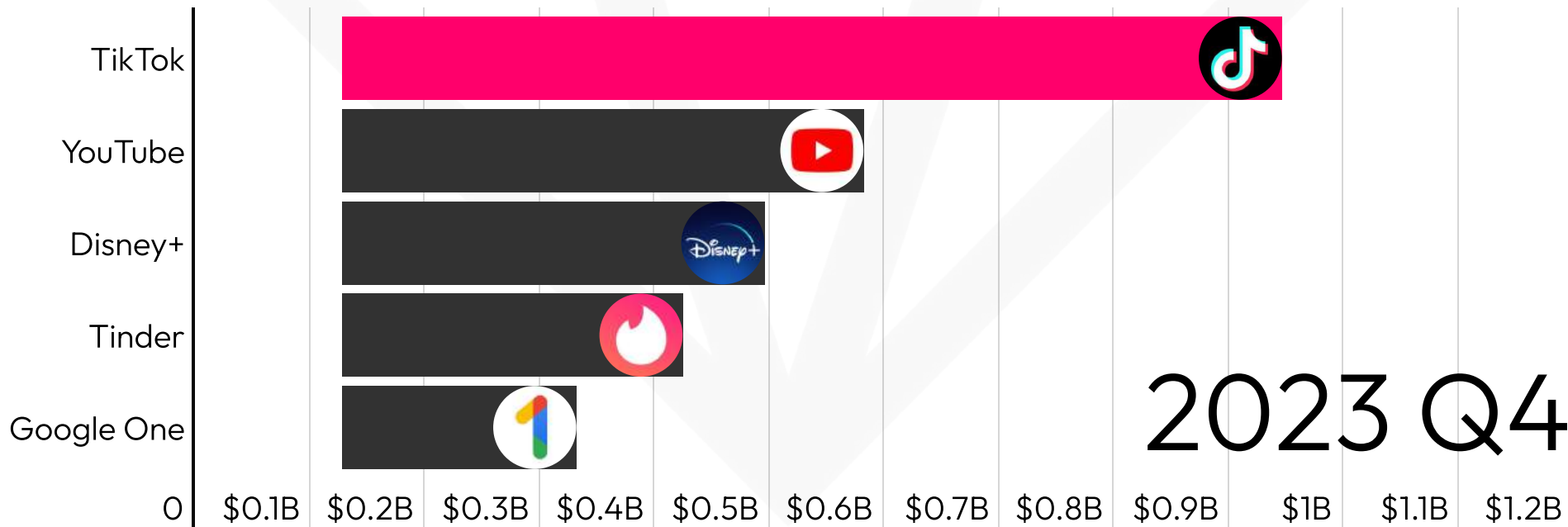
2023 Q4

Source: data.ai Intelligence | Note: Consumer Spend across iOS, Google Play; China is iOS only. Spend is gross — inclusive of any percent taken by the app stores. Excludes mobile games

Subscription vs. One-Time Purchase Consumer Spend for Social Apps

Australia

● Subscription ● One-Time Purchase

Share of Consumer Spend

Australia

● Subscription ● One-Time Purchase

Source: data.ai Intelligence | Note: Consumer Spend is iOS only. Social apps are classified using data.ai's App IQ taxonomy and include Short Videos and Live Streaming apps from the Entertainment genre and excludes Dating.
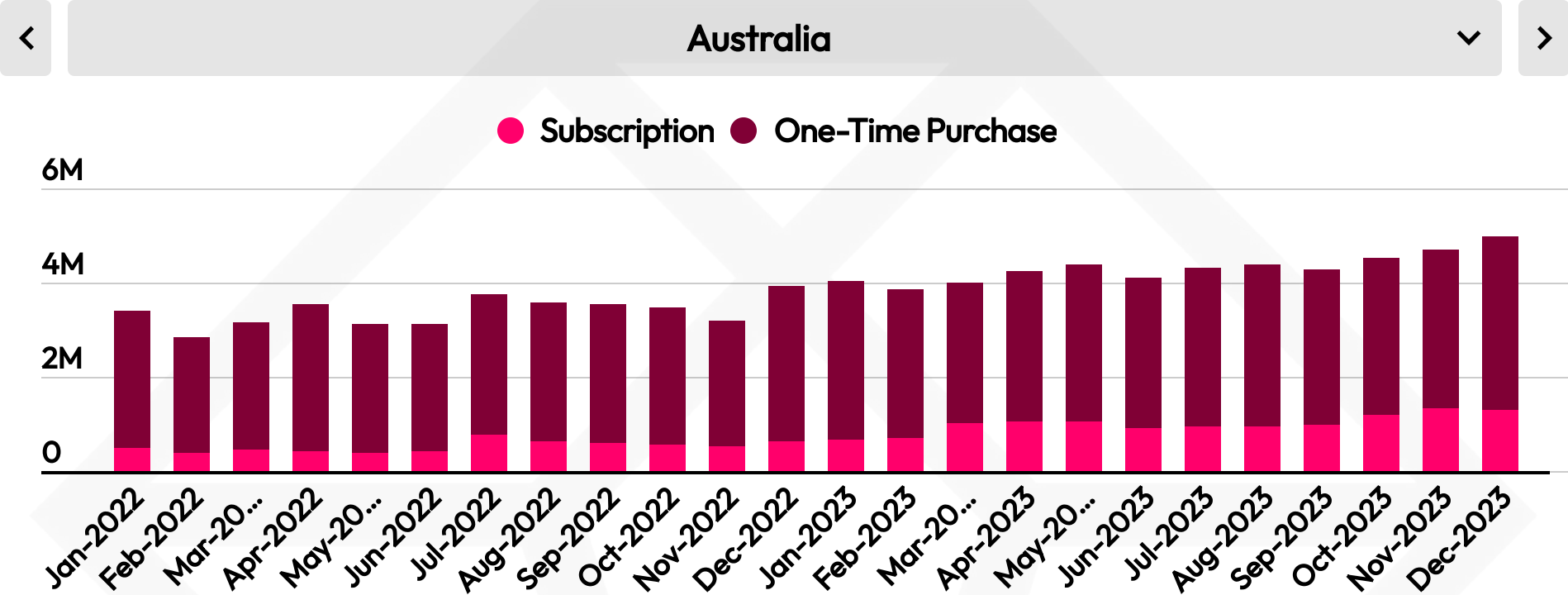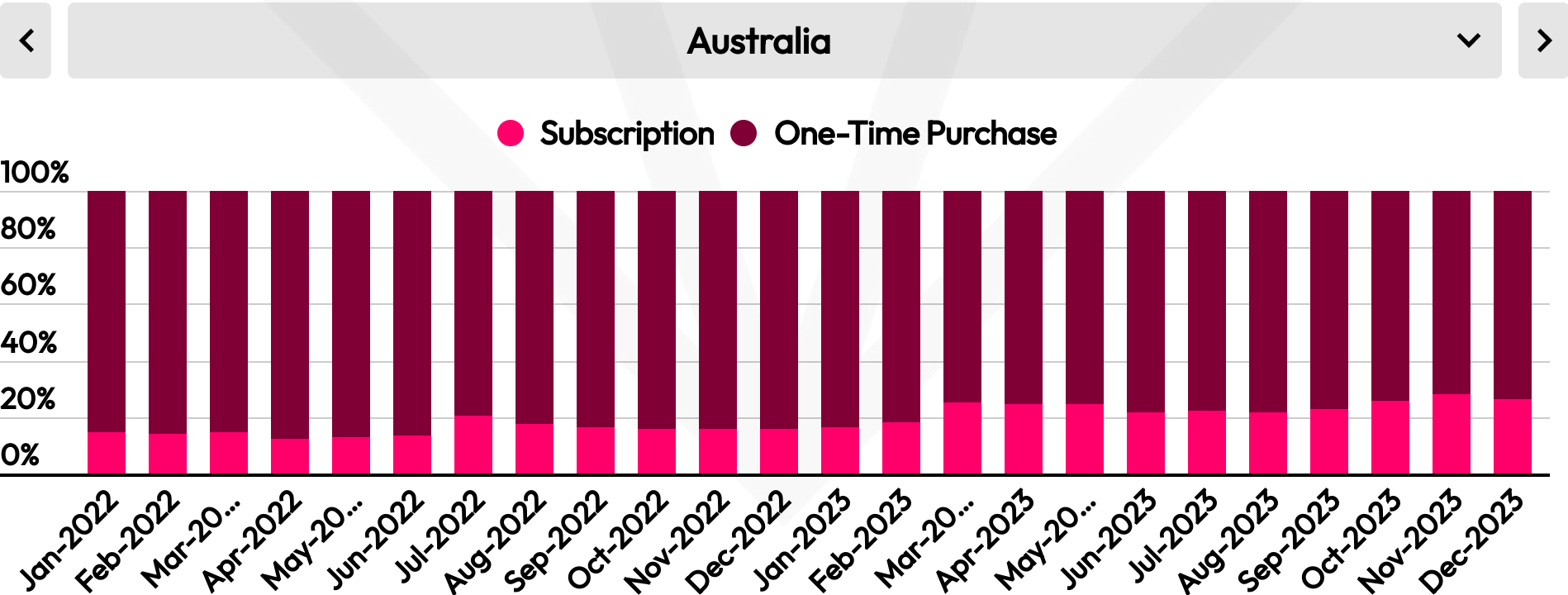
Can Other Apps Capture TikTok's IAP Success?

It took a while for leading social platforms to expand from advertising as their only source of revenue on mobile. TikTok's success with tipping as well as the rise of the subscription model outside of mobile games has revealed the potential for in-app purchases to boost revenue. Consumer spend in Social apps nearly doubled between 2020 and 2023.

While TikTok's monetization mostly comes from one-time purchases, it is an outlier in this respect. Nearly all other top non-game monetizers rely heavily on subscriptions. Snapchat, for example, has found strong revenue growth with its Snapchat+ subscription.

Instagram, on the other hand, is attempting to replicate some of TikTok's magic with its Instagram Badges (similar to TikTok coins).

Want to see how well Instagram Badges are performing? data.ai customers can track the latest trends with IAP SKU

TikTok Monetization is Unparalleled

<u>TikTok</u> now earns more than $1 per user in the United States, up from just 67 cents per user in 2022. Among the top five apps by total consumer spend, <u>Discord</u> ranks a distant second at 17 cents per user.

Some of the largest social media platforms in the US do show some promise in terms of monetizing through in-app purchases. <u>Snapchat's</u> consumed spend increased 5X on the back of its Snapchat+ subscription, and <u>Instagram</u> also saw rapid growth.

It'll be interesting to see how long these social platforms can maintain this strong monetization. In-app purchases are becoming a critical way for social platforms to mitigate the risks seen in the advertising market.

data.ai customers can use <u>Insights Generator</u> to discover the heavy hitters for user monetization in any genre

Social App Monetization

Argentina

● TikTok ● Instagram ● NGL ● X ● Skype

Better Monetization

Larger User Base

Average Monthly Active Users

40,000,000
30,000,000
20,000,000
10,000,000
0

0   0.01   0.02   0.03   0.04   0.05

Average Monthly Revenue Per User ($)
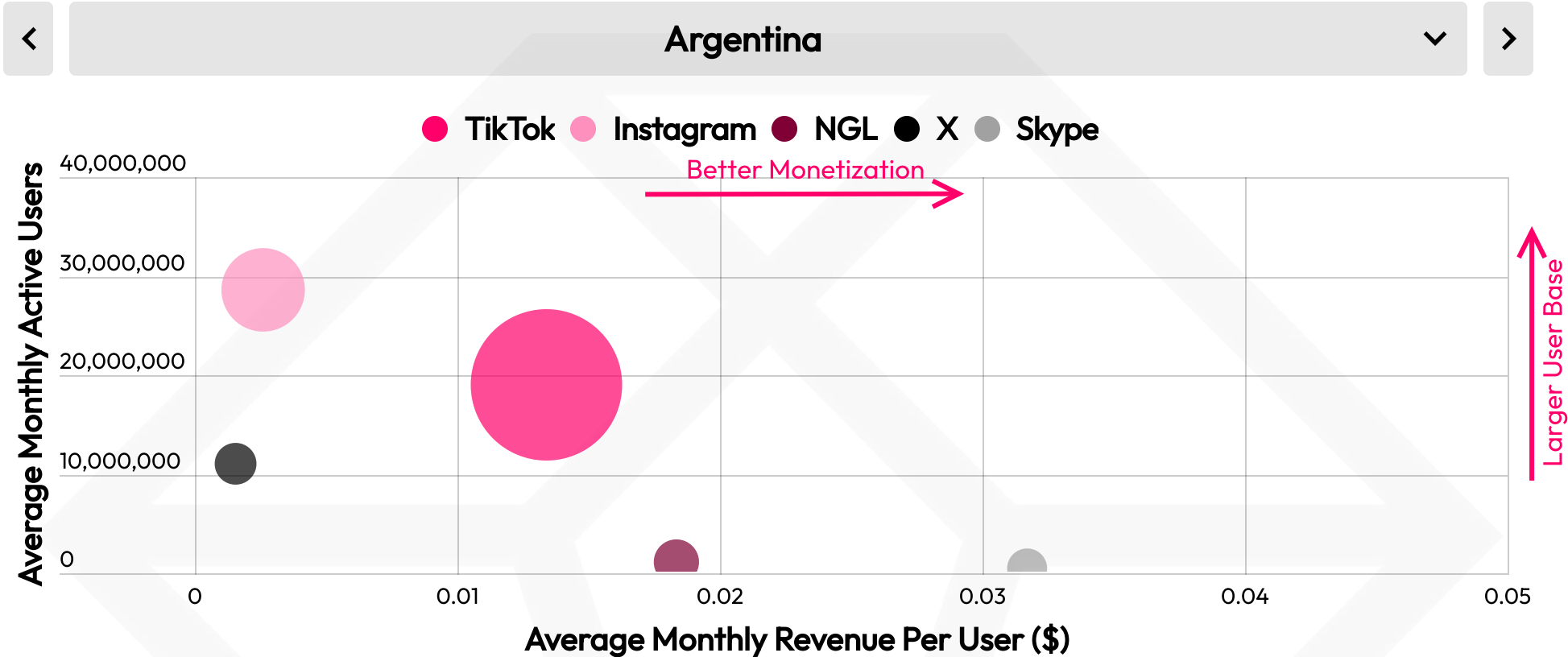
Yearly Average Monthly ARPU for Top Social Apps
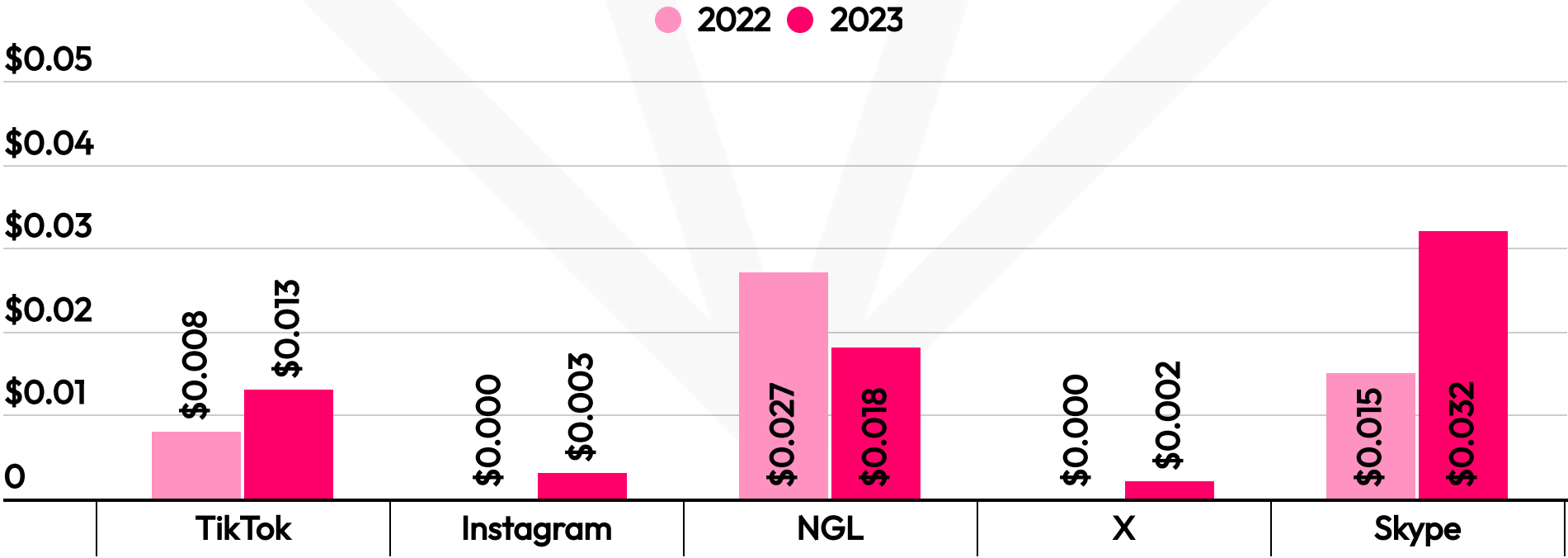
● 2022 ● 2023

	TikTok	Instagram	NGL	X	Skype
2022	$0.008	$0.000	$0.027	$0.000	$0.015
2023	$0.013	$0.003	$0.018	$0.002	$0.032

$0.05
$0.04
$0.03
$0.02
$0.01
0

2023 Rankings by Market | Social

AMER – Downloads		AMER – Consumer Spend	APAC – Downloads	APAC – Consumer Spend	EMEA – Downloads		EMEA – Consumer Spend

	Worldwide	United States	Canada	Mexico	Brazil	Argentina	Colombia	Chile	Peru
1	TikTok (Entertainment | Short Videos)	TikTok (Entertainment | Short Videos)	Threads (Social Media | MicroBlogging)	TikTok (Entertainment | Short Videos)	TikTok (Entertainment | Short Videos)	TikTok (Entertainment | Short Videos)	TikTok (Entertainment | Short Videos)	TikTok (Entertainment | Short Videos)	TikTok (Entertainment | Short Videos)
2	Instagram (Social Media | Media Sharing Networks)	Threads (Social Media | MicroBlogging)	TikTok (Entertainment | Short Videos)	WhatsApp Messenger (Social Media | Communication)	Instagram (Social Media | Media Sharing Networks)	Instagram (Social Media | Media Sharing Networks)	Facebook (Social Media | Social Networks)	Instagram (Social Media | Media Sharing Networks)	Facebook (Social Media | Social Networks)
3	Facebook (Social Media | Social Networks)	WhatsApp Messenger (Social Media | Communication)	WhatsApp Messenger (Social Media | Communication)	Facebook (Social Media | Social Networks)	Threads (Social Media | MicroBlogging)	Facebook (Social Media | Social Networks)	Instagram (Social Media | Media Sharing Networks)	WhatsApp Messenger (Social Media | Communication)	WhatsApp Messenger (Social Media | Communication)
4	WhatsApp Messenger (Social Media | Communication)	Instagram (Social Media | Media Sharing Networks)	Instagram (Social Media | Media Sharing Networks)	Instagram (Social Media | Media Sharing Networks)	WhatsApp Messenger (Social Media | Communication)	WhatsApp Messenger (Social Media | Communication)	WhatsApp Messenger (Social Media | Communication)	Facebook (Social Media | Social Networks)	Instagram (Social Media | Media Sharing Networks)
5	Telegram (Social Media | Communication)	Facebook (Social Media | Social Networks)	Facebook (Social Media | Social Networks)	Threads (Social Media | MicroBlogging)	Facebook (Social Media | Social Networks)	Pinterest (Social Media | Media Sharing Networks)	Telegram (Social Media | Communication)	Telegram (Social Media | Communication)	Telegram (Social Media | Communication)

Food & Drink

No turning back: hungry consumers embrace mobile ordering and food delivery as weekly habits.

DiDi as a global leader in ride-hailing services, continues to grow rapidly in international markets in providing affordable ride-hailing, food delivery and fintech services in 2023. In this venture, data.ai has been a trustworthy and invaluable analytics partner, providing us comprehensive market data and user behavior analytics, which have enabled us to understand and adapt to diverse market dynamics across different regions. Their in-depth analysis of app usage trends, competitive landscapes, and consumer preferences have been pivotal in crafting localized marketing strategies.

Ajay Kaul
Global Performance Marketing Head

Quarterly Metrics for Food & Drink Subgenres by Market
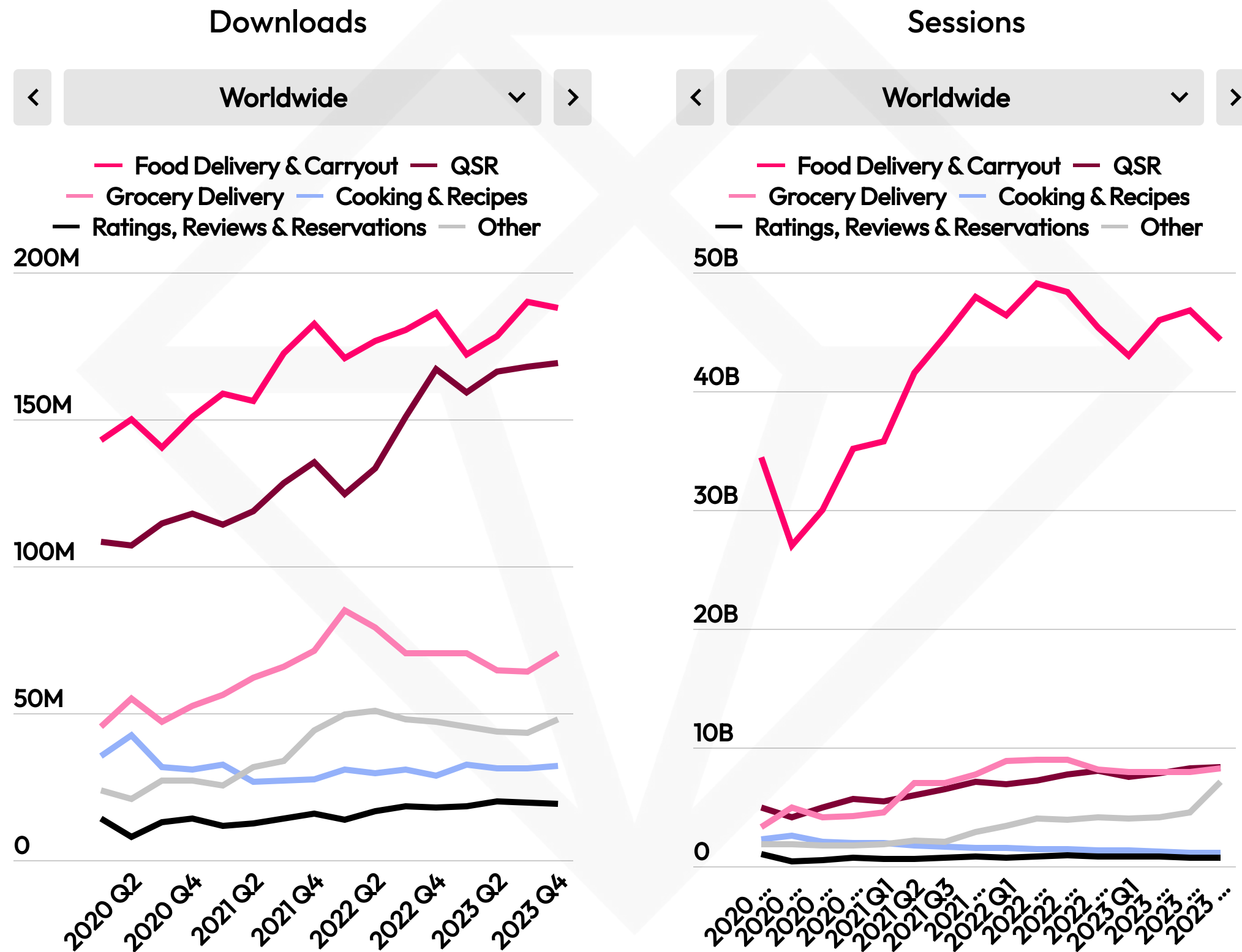
Downloads

Legend:
- Food Delivery & Carryout — QSR
- Grocery Delivery — Cooking & Recipes
- Ratings, Reviews & Reservations — Other

200M
150M
100M
50M
0

2020 Q2, 2020 Q4, 2021 Q2, 2021 Q4, 2022 Q2, 2022 Q4, 2023 Q2, 2023 Q4

Sessions

Legend:
- Food Delivery & Carryout — QSR
- Grocery Delivery — Cooking & Recipes
- Ratings, Reviews & Reservations — Other

50B
40B
30B
20B
10B
0

2020, 2020, 2020, 2021 Q1, 2021 Q2, 2021 Q3, 2021, 2022 Q1, 2022, 2022, 2023 Q1, 2023, 2023, 2023

Source: data.ai Intelligence | Note: Downloads across iOS, Google Play; China is iOS only. Sessions on Android Phones only. Food & Drink apps are classified using data.ai's App IQ taxonomy.

FOOD & DRINK

Food & Drink Apps Soared During the Pandemic and Maintained the Gains Since

Quick-service restaurant (QSR) apps downloads climbed 50% between 2020 and 2023, with most of that growth coming since Q3 2022. QSR saw particularly strong adoption growth in China and the UK.

Food Delivery & Carryout remained the top subgenre by downloads and held an even larger gap by total sessions. While sessions have dropped off a bit from their peak in 2022, they remain well above pre-pandemic levels.

In the US, the QSR and Food Delivery & Carryout subgenres have diverged as in-person dining resumed, both in terms of new downloads and sessions. Top QSRs like McDonald's and Starbucks have made mobile apps an integral part of their strategy, including loyalty and rewards programs and in-app ordering options.

Combine data.ai's Market Size with its unique App IQ taxonomy to monitor the latest trends for Food & Drink apps

Mobile Apps Provide a Valuable Way to Boost Customer Loyalty

Like many retailers, QSR apps have found that improving the customer experience and adding rewards programs are great ways to keep customers coming back.
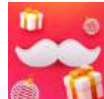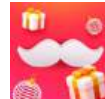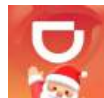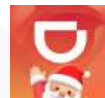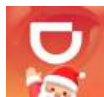
Discover which apps have been the best at adding users and increasing engagement. In the United States, for instance, McDonald's and Domino's were able to grow their user base and increase the number of sessions per user in 2023.

Discover how McDonald's is boosting engagement with features like a rewards program, mobile ordering and delivery

Top Quick-Service Restaurant (QSR) App MAU Growth vs. Session per User Growth

< **Worldwide** ⌄ >

● McDonald's (Rest of World)
● McDonald's (United States) ● Domino's Pizza (India)
● Starbucks (US and Canada) ● McDonald's (Japan)

Growing User Base →

Improving Engagement ↑

YoY Average Monthly Sessions per User Growth (%)

YoY Average MAU Growth (%)

Top Apps by Average MAU in 2023

	App
1	McDonald's (Rest of World)
2	McDonald's (United States)
3	Domino's Pizza (India)
4	Starbucks (US and Canada)
5	McDonald's (Japan)
6	McDonald's (LATAM)
7	KFC (China)
8	Chick-fil-A
9	Domino's Pizza (United States)
10	Taco Bell

Source: data.ai Intelligence | Note: MAU across iOS and Android. Sessions on Android Phones only. QSR apps are classified using data.ai's App IQ taxonomy.

2023 Rankings by Market | Food & Drink

	AMER – Downloads		AMER – MAU	APAC – Downloads	APAC – MAU	EMEA – Downloads	EMEA – MAU
	Worldwide	**United States**	**Canada**	**Mexico**	**Brazil**	**Argentina**	**Colombia**	**Chile**	**Peru**
1	Zomato (Food & Drink | Food Delivery & Carryout)	McDonald's (Food & Drink | QSR)	McDonalds Canada (Food & Drink | QSR)	Rappi (Food & Drink | Food Delivery & Carryout)	iFood Delivery de Comida (Food & Drink | Food Delivery & Carryout)	PedidosYa (Food & Drink | Food Delivery & Carryout)	Rappi (Food & Drink | Food Delivery & Carryout)	PedidosYa (Food & Drink | Food Delivery & Carryout)	PedidosYa (Food & Drink | Food Delivery & Carryout)
2	McDonald's App (Food & Drink | QSR)	DoorDash (Food & Drink | Food Delivery & Carryout)	Uber Eats (Food & Drink | Food Delivery & Carryout)	DiDi Food (Food & Drink | Food Delivery & Carryout)	McDonald's App (Food & Drink | QSR)	McDonald's App (Food & Drink | QSR)	DiDi Food (Food & Drink | Food Delivery & Carryout)	McDonald's App (Food & Drink | QSR)	Agora: Ahorra, compra y paga (Food & Drink | Grocery Delivery)
3	Uber Eats (Food & Drink | Food Delivery & Carryout)	Uber Eats (Food & Drink | Food Delivery & Carryout)	DoorDash (Food & Drink | Food Delivery & Carryout)	Uber Eats (Food & Drink | Food Delivery & Carryout)	Zé Delivery de Bebidas (Food & Drink | Grocery Delivery)	Mostaza (Food & Drink | QSR)	McDonald's App (Food & Drink | QSR)	Spid35: Miles de productos (Food & Drink | Grocery Delivery)	Rappi (Food & Drink | Food Delivery & Carryout)
4	Grab (Food & Drink | Food Delivery & Carryout)	Starbucks (Food & Drink | QSR)	Tim Hortons (Food & Drink | QSR)	McDonald's App (Food & Drink | QSR)	Burger King Brasil (Food & Drink | QSR)	Grido (Food & Drink | Restaurants & Bars)	Tiendasya Domicilio De Bebidas (Food & Drink | Food Delivery & Carryout)	Uber Eats (Food & Drink | Food Delivery & Carryout)	DiDi Food (Food & Drink | Food Delivery & Carryout)
5	ele.me (Food & Drink | Food	Domino's Pizza USA (Food & Drink |	Starbucks (Food & Drink | QSR)	Dominos MX (Food & Drink | QSR)	Habibs (Food & Drink | QSR)	Burger King Argentina (Food &	TULIO Recomienda (Food & Drink |	Rappi (Food & Drink | Food Delivery &	Starbucks Perú (Food & Drink | QSR)

Top Features Loved by Food & Drink

Keywords

Advanced
Reviews

Feature
Comparison

Download
Channel

Travel

The travel floodgates are open: pent-up demand reshapes consumer spending priorities.

> As a leading global travel service provider, Trip.com ensures world-class customer service through its all-in-one app offerings. Committed to pursuing the perfect trip for a better world, we constantly seek creative ways to serve and engage our users. Our partnership with data.ai has helped us access precise market insights and embrace new opportunities in the ever-changing mobile app landscape.

Han Feng
Senior Marketing Director

Trip.com

Travel App Trends in Key Markets
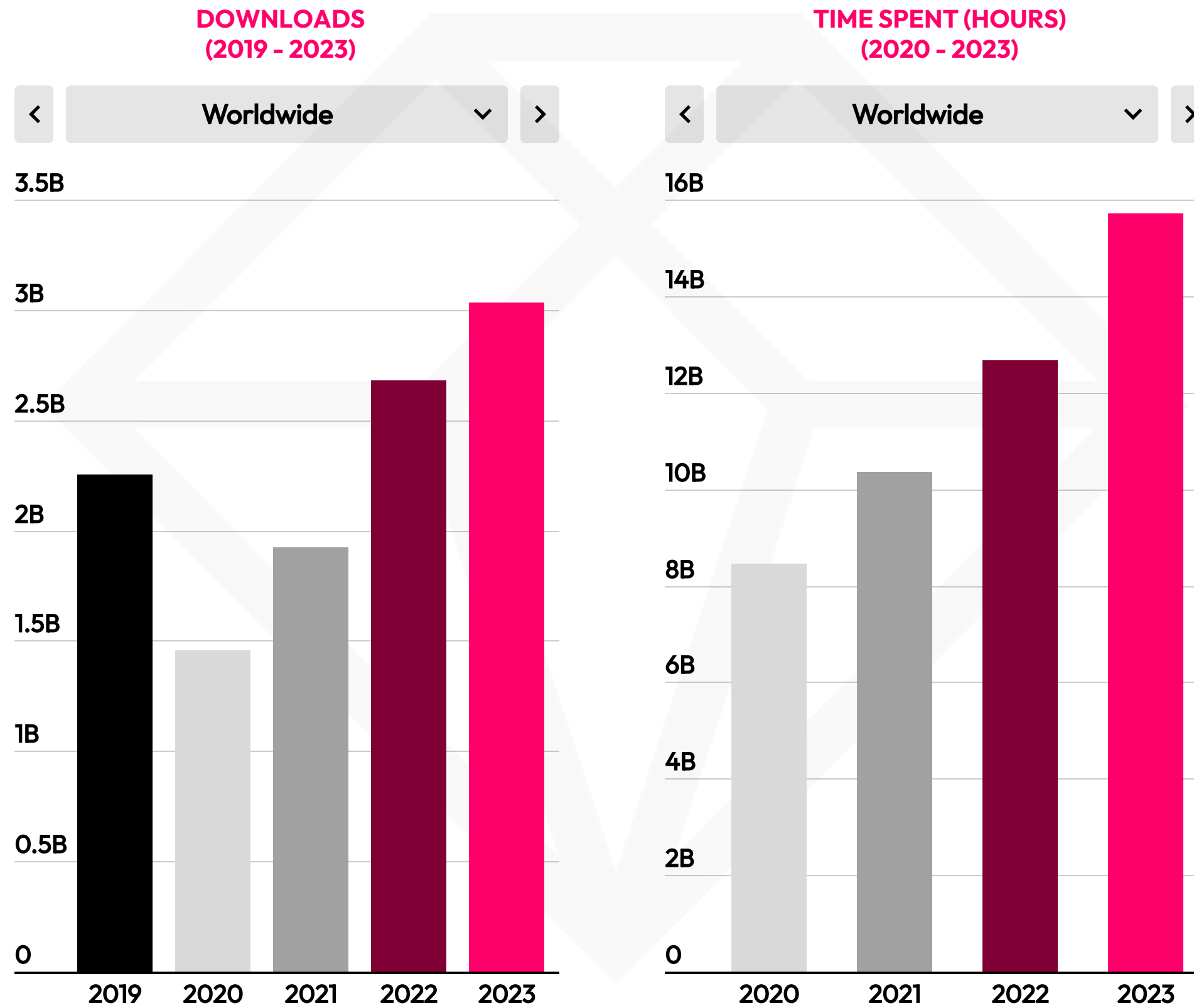
DOWNLOADS (2019 - 2023)

| ‹ | Worldwide ⌄ | › |

3.5B
3B
2.5B
2B
1.5B
1B
0.5B
0

2019 2020 2021 2022 2023

TIME SPENT (HOURS) (2020 - 2023)

| ‹ | Worldwide ⌄ | › |

16B
14B
12B
10B
8B
6B
4B
2B
0

2020 2021 2022 2023

Record-Breaking Travel Continued in 2023 with Downloads Up 20% Compared to 2019

It didn't take long for travel to come roaring back. By 2022, downloads were well-above pre-pandemic levels in most markets. Travel app downloads came roaring back after the COVID-19 pandemic in 2022.

With outsized growth coming from pent up demand following years of low travel, it was uncertain whether these gains would hold in 2023. The results are in and it is clear that the huge demand for travel was not a one-off.

Compared to the low in 2020, global downloads more than doubled by 2023 and time spent was up more than 85%.

Check out our analysis of the record-setting travel during the summer of 2023

Quarterly Travel App Downloads by Subgenre

Worldwide

Legend:
— Transportation — Integrated Travel Service — Rail & Coach Booking — Hotel Booking — Airline Apps

Y-axis: 400M, 300M, 200M, 100M, 0

X-axis: 2019 Q1, 2019 Q2, 2019 Q3, 2019 Q4, 2020 Q1, 2020 Q2, 2020 Q3, 2020 Q4, 2021 Q1, 2021 Q2, 2021 Q3, 2021 Q4, 2022 Q1, 2022 Q2, 2022 Q3, 2022 Q4, 2023 Q1, 2023 Q2, 2023 Q3, 2023 Q4
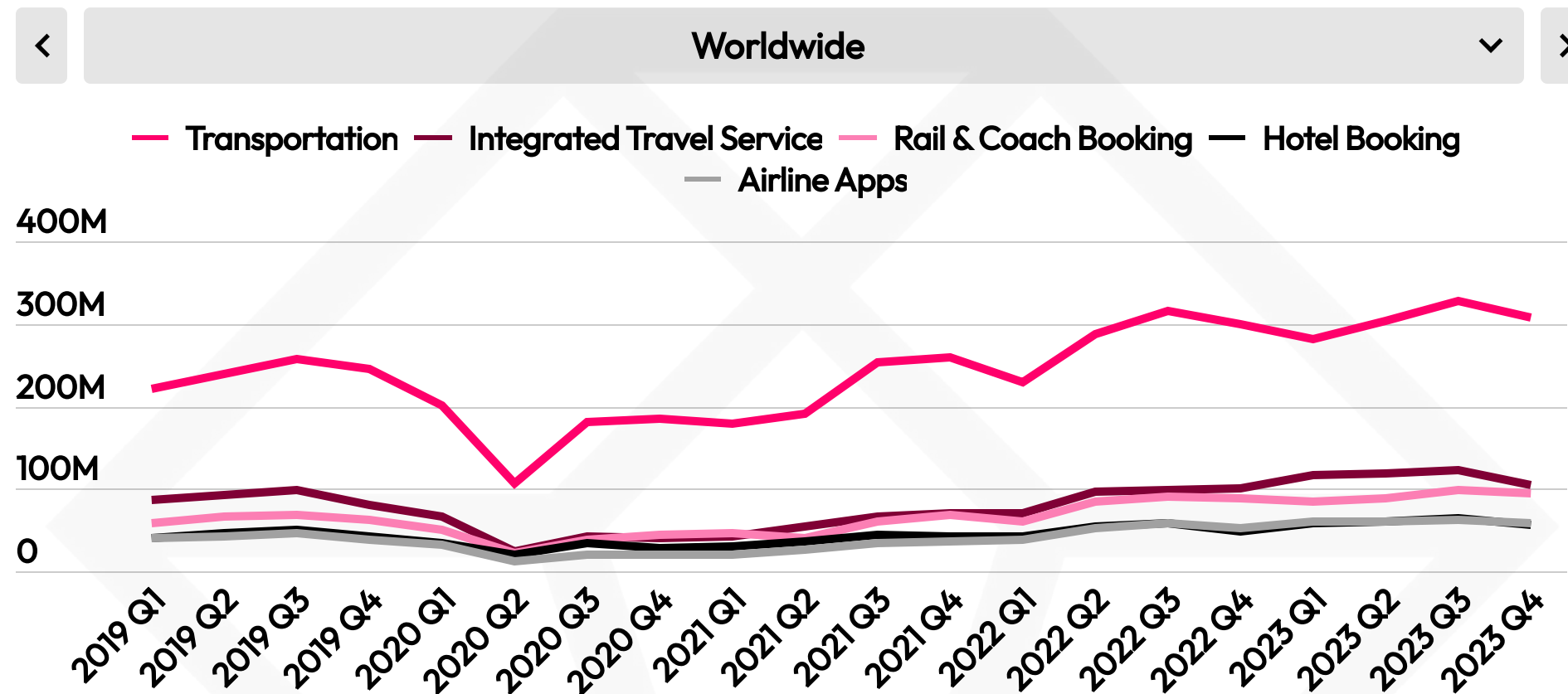
Download Growth Between 2019 and 2023

Airline Apps	Rail & Coach Booking	Hotel Booking	Integrated Travel Service	Transportation
44%	44%	32%	29%	26%
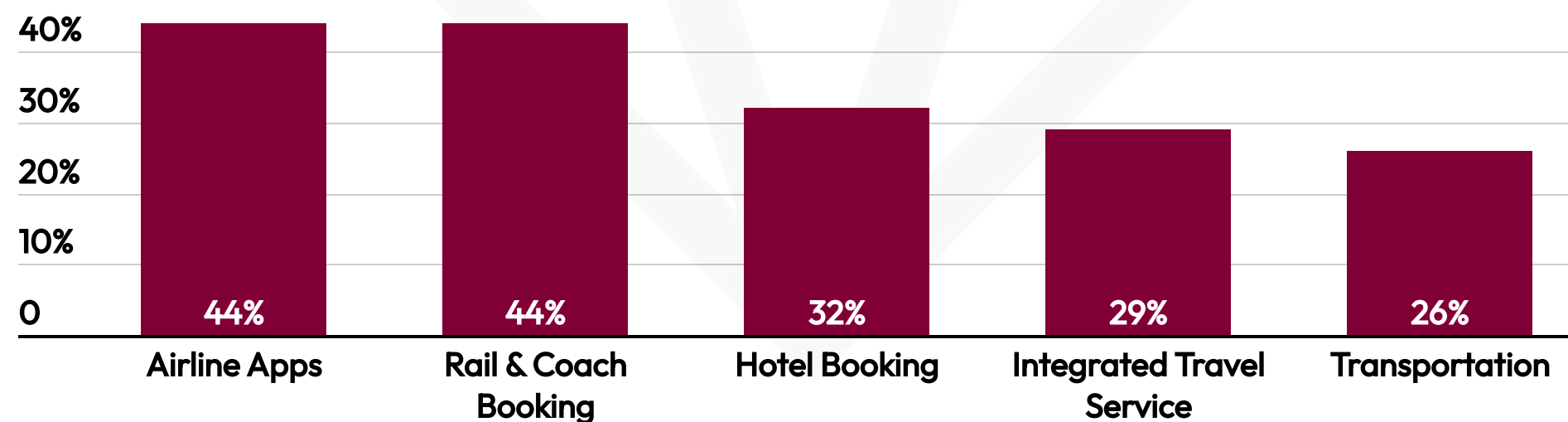
Source: data.ai Intelligence | Note: Downloads across iOS, Google Play; China is iOS only. Travel apps are classified using data.ai's App IQ taxonomy.

Travel is Back and Better Than Ever in 2023

Top subgenres all saw positive year-over-year growth, including 34% growth for Integrated Travel Service, 23% growth for Airline Apps and 16% growth for Hotel Booking.

The travel rebound was strong across the globe. In nearly all top markets, at least four of the top five subgenres had more downloads in 2023 than in pre-pandemic 2019.

data.ai customer?
Find out whether specific travel apps are relying on paid or organic channels to acquire new users

Rideshare Outlook Improving But Struggling to Find Pre-Pandemic Success

Downloads and sessions for top rideshare apps like Uber have continued to improve from the low seen in 2020 during the pandemic. However, many apps have yet to reach the levels they had in January 2020 (before the start of the pandemic in most countries).

Uber's monthly downloads in 2023 were down 14% compared to January 2020. Meanwhile, its sessions have just reached pre-pandemic levels in 2023.

Has rideshare audience attention returned? Find out with Insights Generator, part of data.ai Intelligence

Top Transportation App Downloads and Session Trends
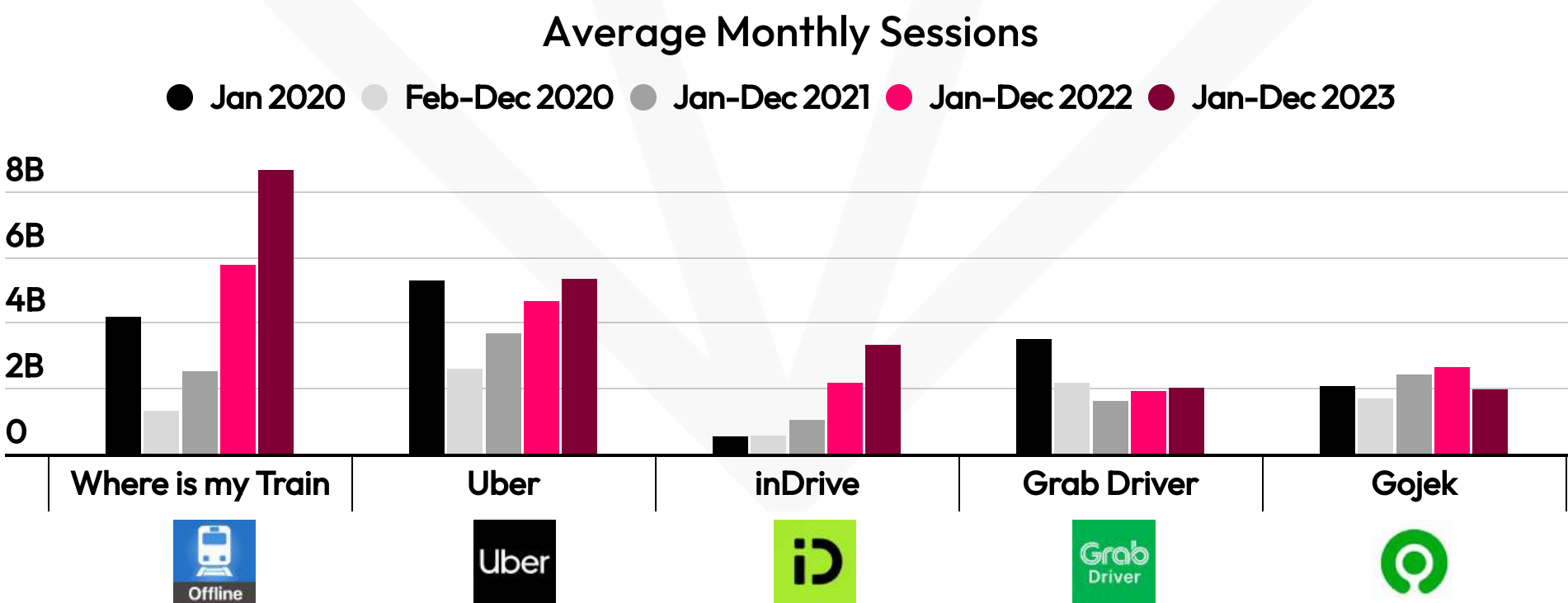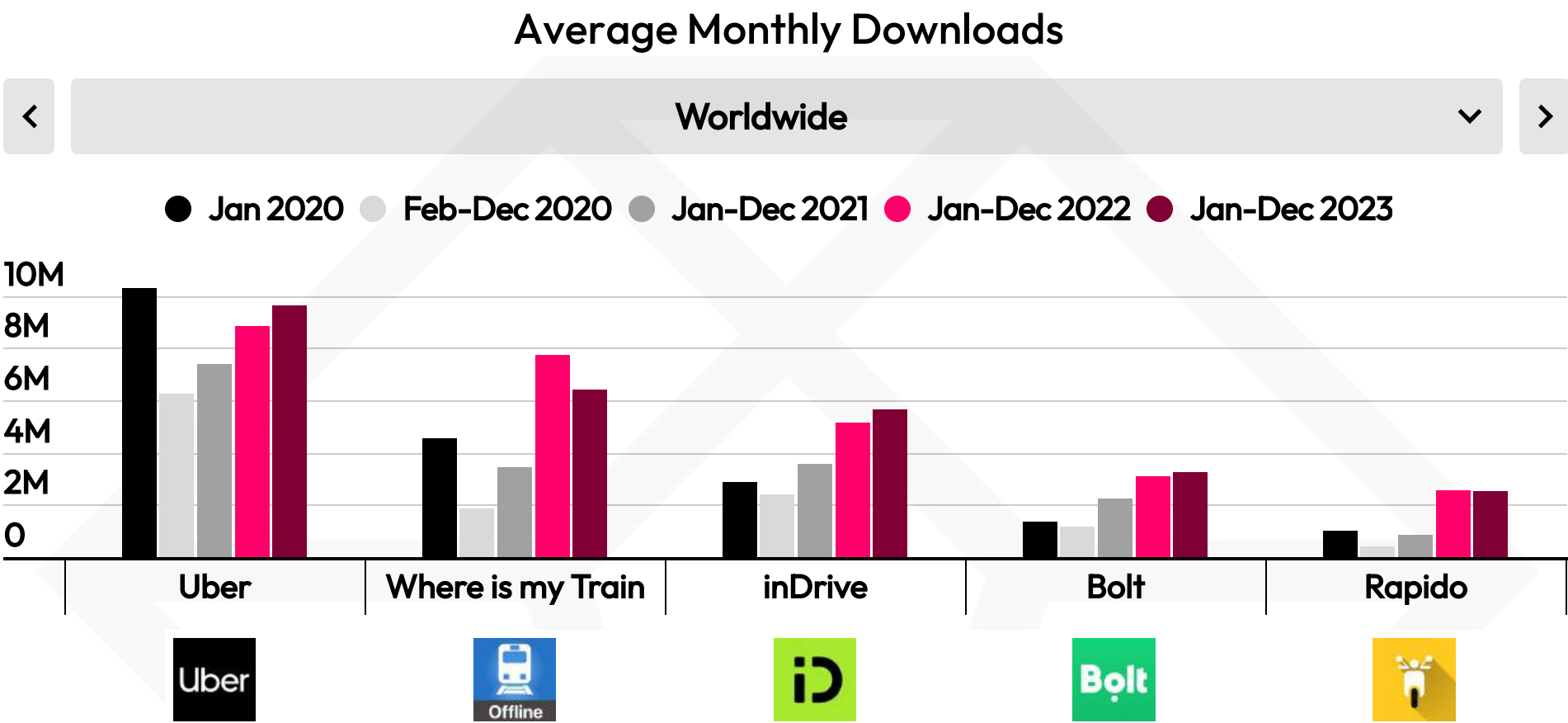
Average Monthly Downloads

Worldwide

● Jan 2020   ○ Feb-Dec 2020   ● Jan-Dec 2021   ● Jan-Dec 2022   ● Jan-Dec 2023

Uber | Where is my Train | inDrive | Bolt | Rapido

Average Monthly Sessions

● Jan 2020   ○ Feb-Dec 2020   ● Jan-Dec 2021   ● Jan-Dec 2022   ● Jan-Dec 2023

Where is my Train | Uber | inDrive | Grab Driver | Gojek

Source: data.ai Intelligence | Note: Downloads across iOS, Google Play; China is iOS only. Sessions on Android Phones only. Transportation apps are classified using data.ai's App IQ taxonomy.

2023 Rankings by Market | Travel

AMER - Downloads

	Worldwide	United States	Canada	Mexico	Brazil	Argentina	Colombia	Chile	Peru
1	Uber (Travel | Transportation)	Uber (Travel | Transportation)	Uber (Travel | Transportation)	DiDi-Mobility (Travel | Transportation)	Uber (Travel | Transportation)	Uber (Travel | Transportation)	inDrive (Travel | Transportation)	Uber (Travel | Transportation)	inDrive (Travel | Transportation)
2	Where is my Train (Travel | Transportation)	Lyft (Travel | Transportation)	Expedia (Travel | Integrated Travel Service)	Uber (Travel | Transportation)	99Taxis (Travel | Transportation)	Cabify (Travel | Transportation)	DiDi-Mobility (Travel | Transportation)	inDrive (Travel | Transportation)	Yango (Travel | Transportation)
3	Booking.com (Travel | Integrated Travel Service)	Airbnb (Travel | Hotel Booking)	Air Canada (Travel | Airline Apps)	inDrive (Travel | Transportation)	inDrive (Travel | Transportation)	Transit Directions by Moovit (Travel | Other Travel)	Uber (Travel | Transportation)	DiDi-Mobility (Travel | Transportation)	DiDi-Mobility (Travel | Transportation)
4	inDrive (Travel | Transportation)	Expedia (Travel | Integrated Travel Service)	Airbnb (Travel | Hotel Booking)	Airbnb (Travel | Hotel Booking)	Booking.com (Travel | Integrated Travel Service)	DiDi-Mobility (Travel | Transportation)	Airbnb (Travel | Hotel Booking)	Transit Directions by Moovit (Travel | Other Travel)	Cabify (Travel | Transportation)
5	Airbnb (Travel | Hotel Booking)	Hopper (Travel | Integrated Travel Service)	The Transit App (Travel | Transportation)	Booking.com (Travel | Integrated Travel Service)	Transit Directions by Moovit (Travel | Other Travel)	SUBE (Travel | Transportation)	Transit Directions by Moovit (Travel | Other Travel)	Viajes Falabella (Travel | Hotel Booking)	Uber (Travel | Transportation)
6		VRBO Vacation	Booking.com (Travel	Transit Directions by	Booking.com (Travel |	Cabify	Cabify	Airbnb

Health & Fitness

Personalized progress in our pocket: fitness & health trackers and on-demand workout and wellness programs top downloads and spend charts.

"Noom is dedicated to empowering people everywhere to live a better, healthier life," said Barry Wright, chief of staff at Noom. "We're constantly learning about how people are tackling their health and wellness goals, and using tools like data.ai helps us uncover critical insights about what people need, and how our products are keeping people engaged along their health journeys."

Barry Wright
Chief of Staff

NOOM

Know Your Market — Health & Fitness Preferences Vary By Market

All top Health & Fitness subgenres saw strong consumer spend growth in 2023, with Fitness Programs and Weight Loss & Calorie Trackers leading the way. The US is the top market for Health & Fitness accounting for nearly half of all consumer spend in 2023.

Consumer spend trends for different subgenres vary significantly by market. Discover which are growing the fastest.

Discover the monetization leaders by metrics like average revenue per paying user (ARPPU), payer penetration, share of wallet and more with In-App Purchase Behavior

Quarterly Consumer Spend by Health & Fitness Subgenre

Worldwide

Legend: Fitness Program, Weight Loss & Calorie Tracker, Fitness Tracker, Mental Health, Health Monitor, Other

Female Usage Index for Health & Fitness Subgenres
2020 vs 2023

— 2020   — 2023

250					
200					
150					
100					
50					

Weight Loss & Calorie Tracker   Fitness Program   Mental Health   Fitness Tracker   Health Monitor   Women's Health
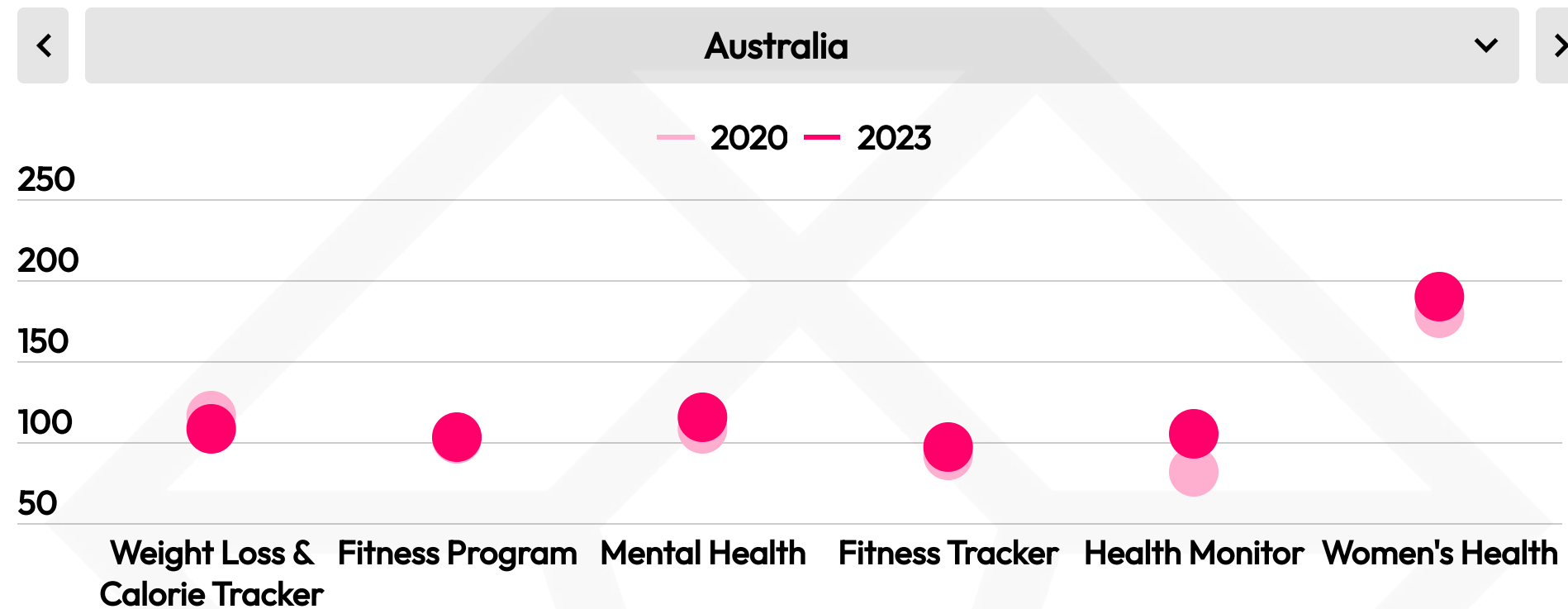
Monthly Average Revenue per User for Health & Fitness Subgenres
2020 vs 2023
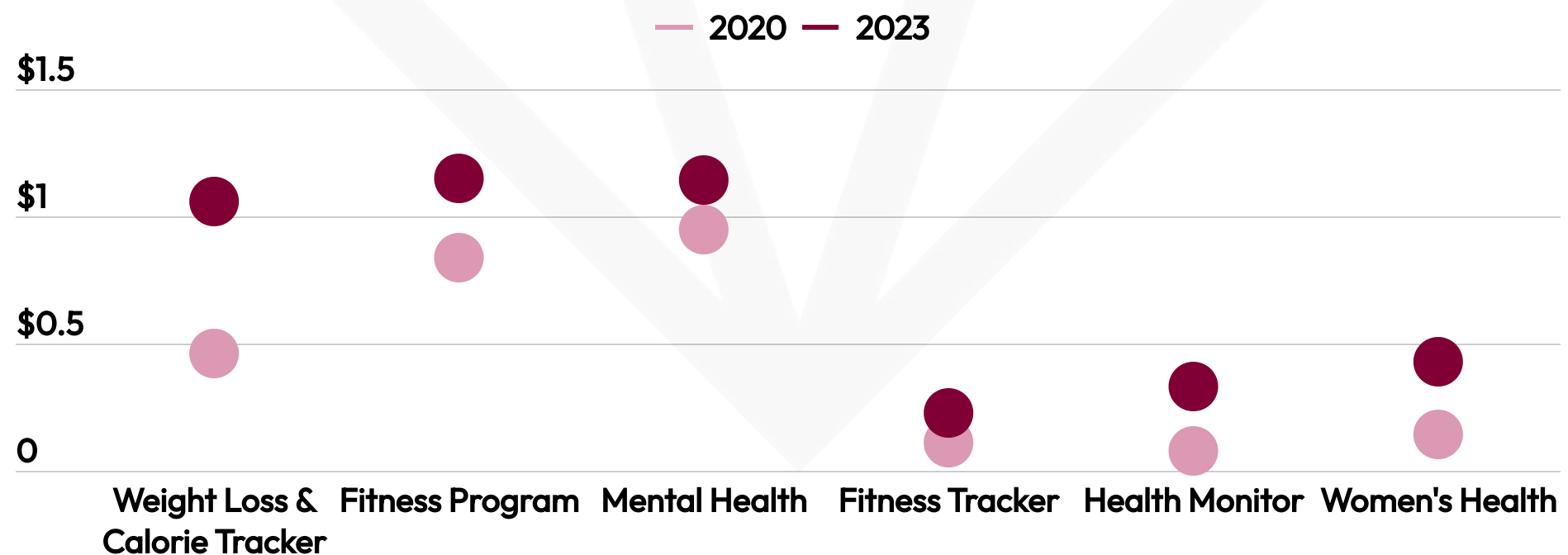
— 2020   — 2023

$1.5	
$1	
$0.5	
0	

Weight Loss & Calorie Tracker   Fitness Program   Mental Health   Fitness Tracker   Health Monitor   Women's Health

Source: data.ai Intelligence | Note: Consumer Spend across iOS, Google Play; China is iOS only. MAU across iOS and Android. Demographic data is Android only. Gender represented as Male and Female only and is not representative of all gender identities. Spend is gross — inclusive of any percent taken by the app stores. Health & Fitness apps are classified using data.ai's App IQ taxonomy.

Health & Fitness Revenue Has Surged — What Demographics are Providing This Growth?

Consumer spend in Health & Fitness apps has surged across all genres since 2020. In the United States, average revenue per user more than doubled in four top subgenres including Weight Loss & Calories Tracker ($1.13 monthly ARPU in 2023) and Women's Health ($0.38).

Mental Health apps gained popularity during the pandemic and brought in more users, especially more female users. Women's Health and Mental Health apps gained revenue by focusing on expanding their user base in general which skews more female. Other subgenres relied on broadening their appeal to a wider audience and their gender split became more balanced as a result.

Develop user profiles based on demographics and user behaviors to guide future product improvements

Share of Health & Fitness Consumer Spend by Price on iOS
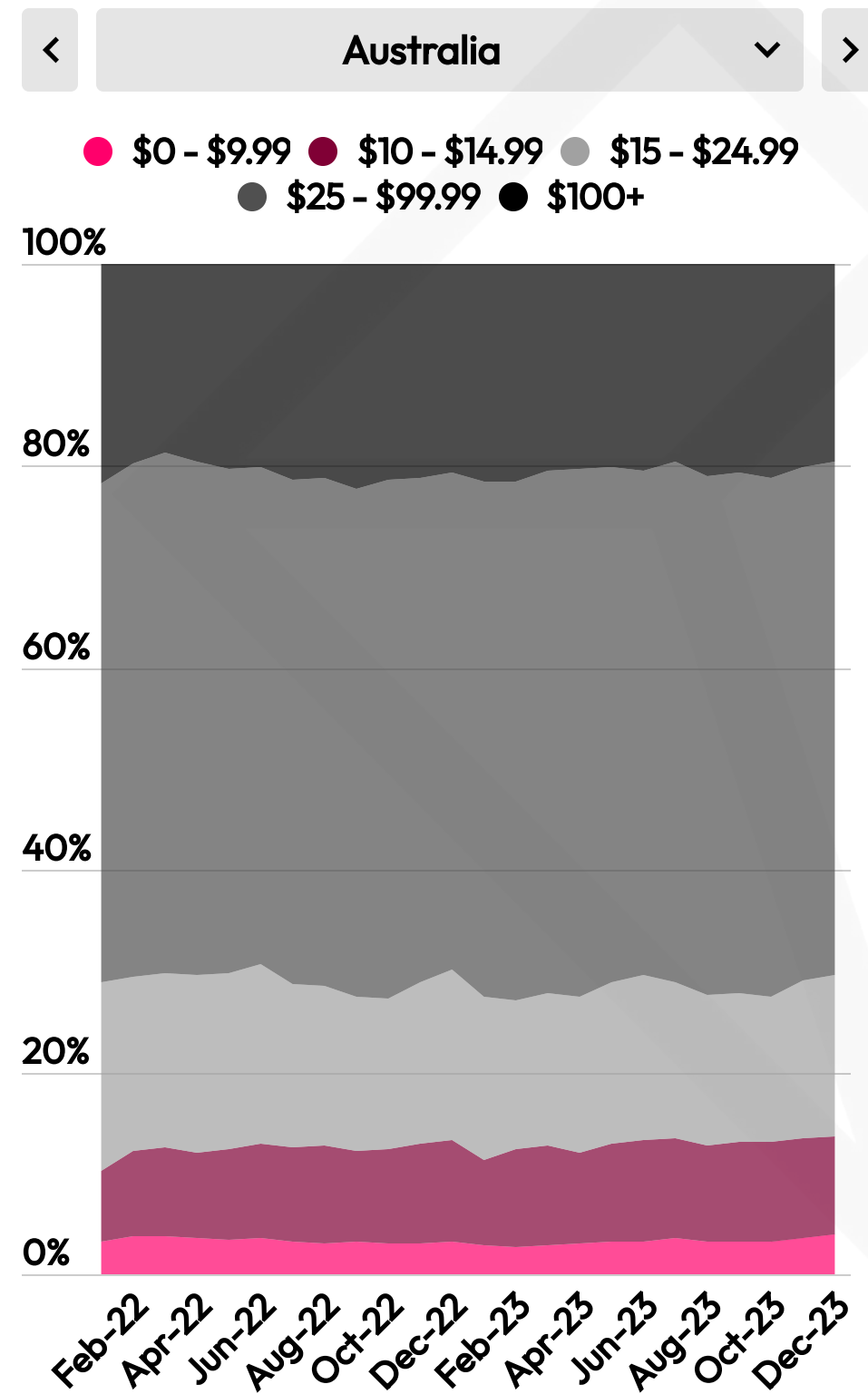
Australia

- ● $0 - $9.99
- ● $10 - $14.99
- ● $15 - $24.99
- ● $25 - $99.99
- ● $100+

Share of Health & Fitness Consumer Spend by Subscription vs. One-Time Purchases on iOS

Australia
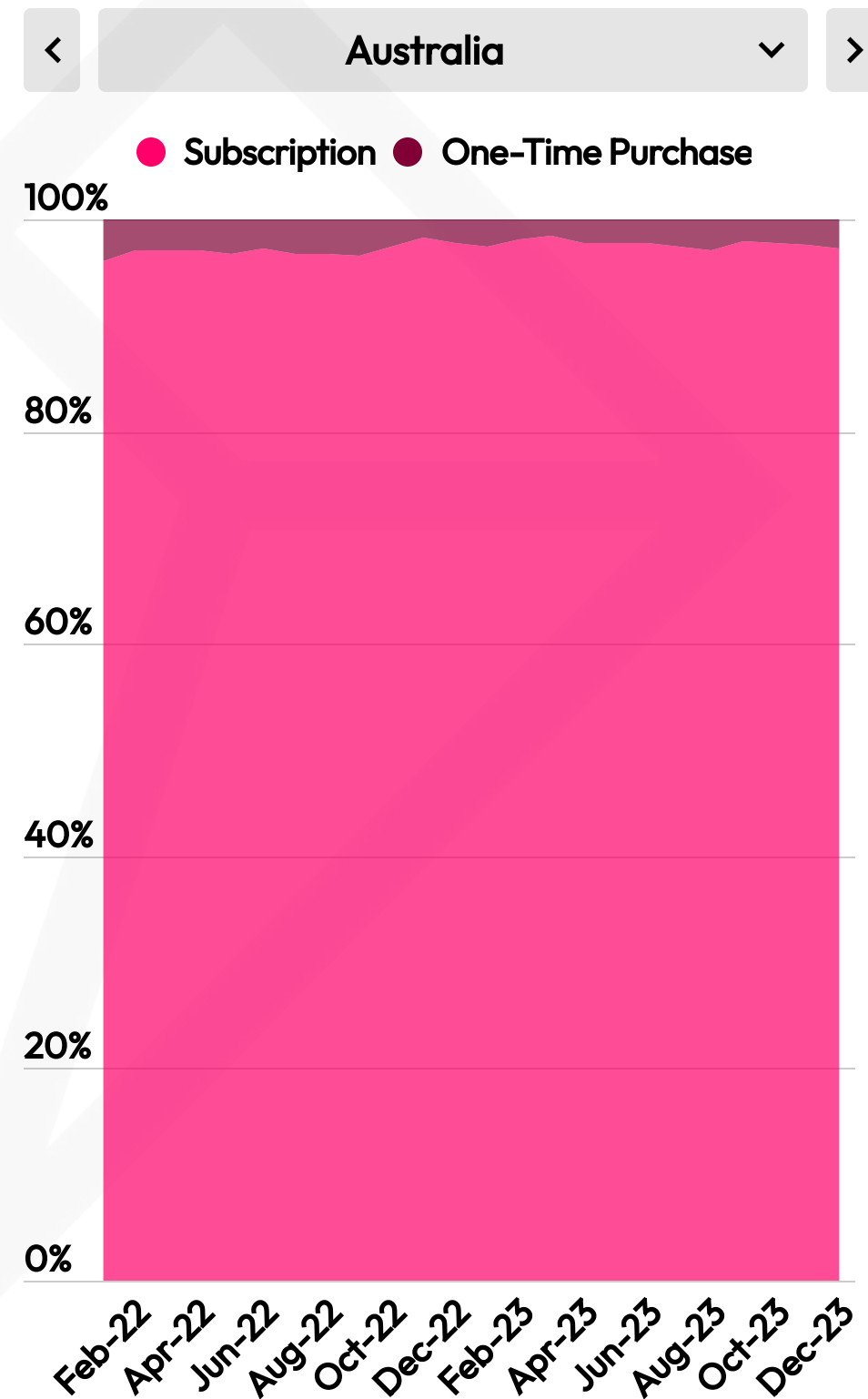
- ● Subscription
- ● One-Time Purchase
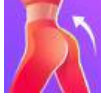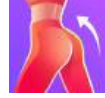
Higher Prices and Subscriptions Improve Health & Fitness Monetization

As prices increased across a variety of industries in 2022 and 2023, Health & Fitness apps were no exception. Some of this increase came from raising prices, but others used their product loyalty to push annual subscriptions which improve retention and give apps more certainty about their revenue.

Not surprisingly, subscriptions are still the preferred in-app purchase option for most Health & Fitness apps. One-time purchases still take a significant share of consumer spend in some APAC markets like China, Japan, and South Korea.

Want to see which in-app purchases are driving revenue growth? Try data.ai's IAP SKU

Source: data.ai Intelligence | Note: IAP SKU data is iOS only.

2023 Rankings by Market | Health & Fitness

	AMER - Downloads	AMER - Consumer Spend	APAC - Downloads	APAC - Consumer Spend	EMEA - Downloads	EMEA - Consumer Spend

	Worldwide	United States	Canada	Mexico	Brazil	Argentina	Colombia	Chile	Peru
1	江苏医保云 (Health & Fitness | National Medical Service)	Planet Fitness Workouts (Health & Fitness | Fitness Program)	Maple (Health & Fitness | Telehealth)	Imss Digital (Health & Fitness | Telehealth)	Conecte SUS (Health & Fitness | National Medical Service)	Prestadores PAMI (Health & Fitness | Telehealth)	FitPro (Health & Fitness | Fitness Tracker)	Flo by Flo Health (Health & Fitness | Women's Health)	FitPro (Health & Fitness | Fitness Tracker)
2	FitPro (Health & Fitness | Fitness Tracker)	Impulse (Health & Fitness | Other Health & Fitness)	Yuka (Health & Fitness | Other Health & Fitness)	FitPro (Health & Fitness | Fitness Tracker)	FitPro (Health & Fitness | Fitness Tracker)	Flo by Flo Health (Health & Fitness | Women's Health)	Sweatcoin (Health & Fitness | Fitness Tracker)	Fitia – Nutrición Inteligente (Health & Fitness | Weight Loss & Calorie Tracker)	Flo by Flo Health (Health & Fitness | Women's Health)
3	Flo by Flo Health (Health & Fitness | Women's Health)	MyChart (Health & Fitness | Telehealth)	Impulse (Health & Fitness | Other Health & Fitness)	Flo by Flo Health (Health & Fitness | Women's Health)	Flo by Flo Health (Health & Fitness | Women's Health)	FitPro (Health & Fitness | Fitness Tracker)	Flo by Flo Health (Health & Fitness | Women's Health)	Feelsy (Health & Fitness | Mental Health)	Inkafarma Móvil (Health & Fitness | Telehealth)
4	Home Workout – No Equipments (Health & Fitness | Fitness Program)	Yuka (Health & Fitness | Other Health & Fitness)	AllTrails (Health & Fitness | Fitness Tracker)	Home Workout – No Equipments (Health & Fitness | Fitness Program)	Lucky Running (Health & Fitness | Fitness Tracker)	Sweatcoin (Health & Fitness | Fitness Tracker)	Home Workout – No Equipments (Health & Fitness | Fitness Program)	FitPro (Health & Fitness | Fitness Tracker)	App RIMAC (Health & Fitness | Telehealth)
5	Da Fit (Health & Fitness | Health Monitor)	JustFit: Lazy Workout (Health & Fitness | Fitness Program)	JustFit: Lazy Workout (Health & Fitness | Fitness Program)	Da Fit (Health & Fitness | Health Monitor)	Consulta Auxílios Completo (Health & Fitness | National Medical Service)	Blood Pressure App (Health & Fitness | Health Monitor)	Blood Pressure App (Health & Fitness | Health Monitor)	Impulse (Health & Fitness | Other Health & Fitness)	Home Workout – No Equipments (Health & Fitness | Fitness Program)

Sports

Unmissable action: Sports TV apps tap into latent demand for live matches; Sports Betting expands in the US — opening a large lucrative market for mobile apps.

A Win for Sports Apps as Huge Growth Continues in 2023

Following a brief lull as live sports shut down at the start of the pandemic in 2020, the demand for sports apps came roaring back. Consumer spend climbed 23% year-over-year in 2023 to $1.8 billion, more than double the total from back in 2019.

Live Sports still provided the bulk of consumer spending among sports apps. In terms of downloads, Fantasy Sports has taken off in recent years and Sports Betting continues to gain traction after it was legalized in the United States.

Sports app performance is highly dependent on seasons and events. See which leagues and events are driving growth by studying weekly or monthly trends.

Sports App Consumer Spend and Downloads by Subgenre
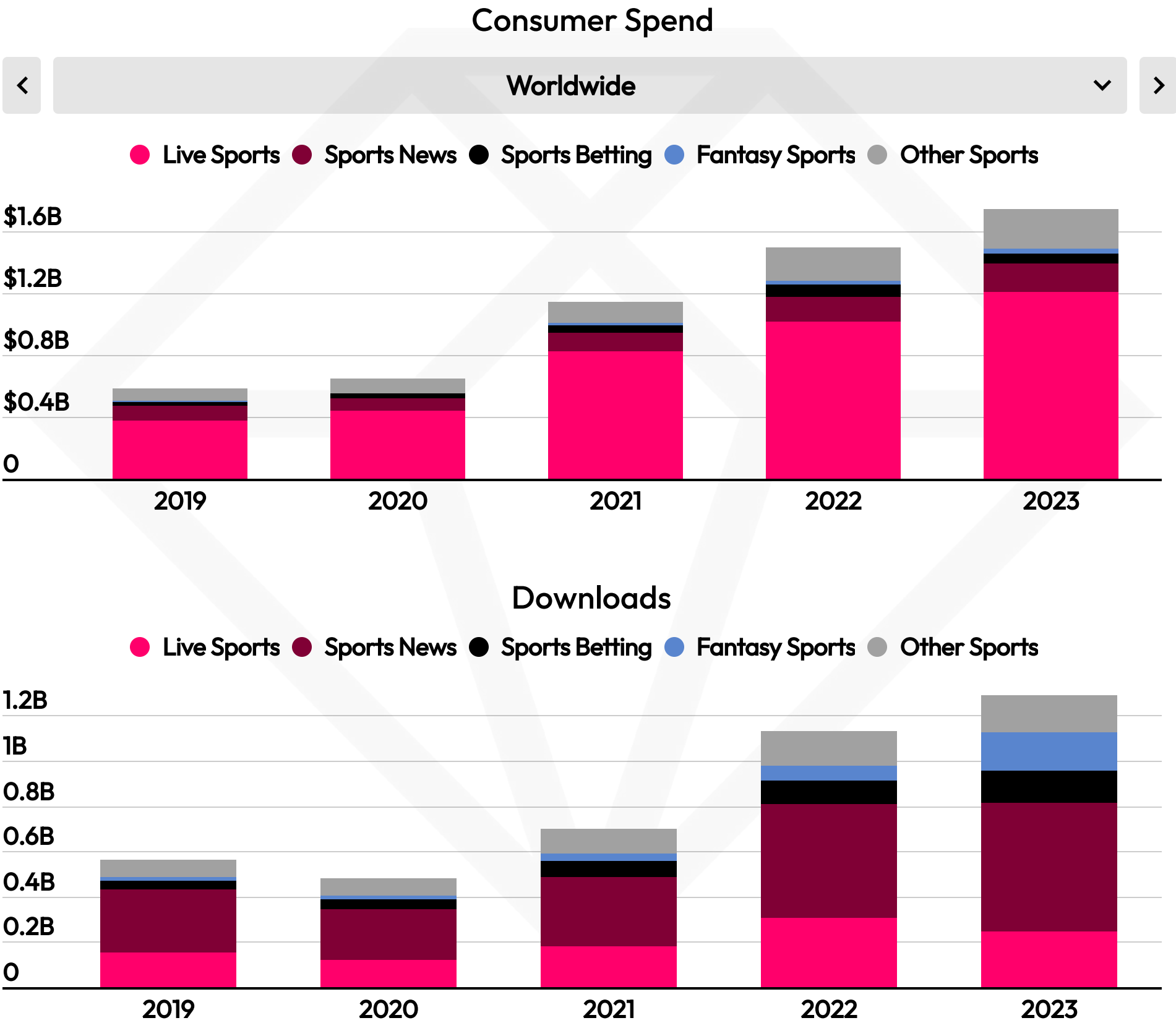
Consumer Spend

Worldwide

● Live Sports   ● Sports News   ● Sports Betting   ● Fantasy Sports   ● Other Sports

Downloads

● Live Sports   ● Sports News   ● Sports Betting   ● Fantasy Sports   ● Other Sports

Source: data.ai Intelligence | Note: Consumer Spend and Downloads across iOS, Google Play; China is iOS only. Spend is gross — inclusive of any percent taken by the app stores. Sports apps are classified using data.ai's App IQ taxonomy.

Fantasy Sports vs Sports Betting Downloads by Country

● Fantasy Sports ● Sports Betting

Source: data.ai Intelligence | Note: Downloads across iOS, Google Play; China is iOS only.
Fantasy Sports and Sports Betting apps are classified using data.ai's App IQ taxonomy.

Top Fantasy Sports and Sports Betting Apps by Downloads in 2023
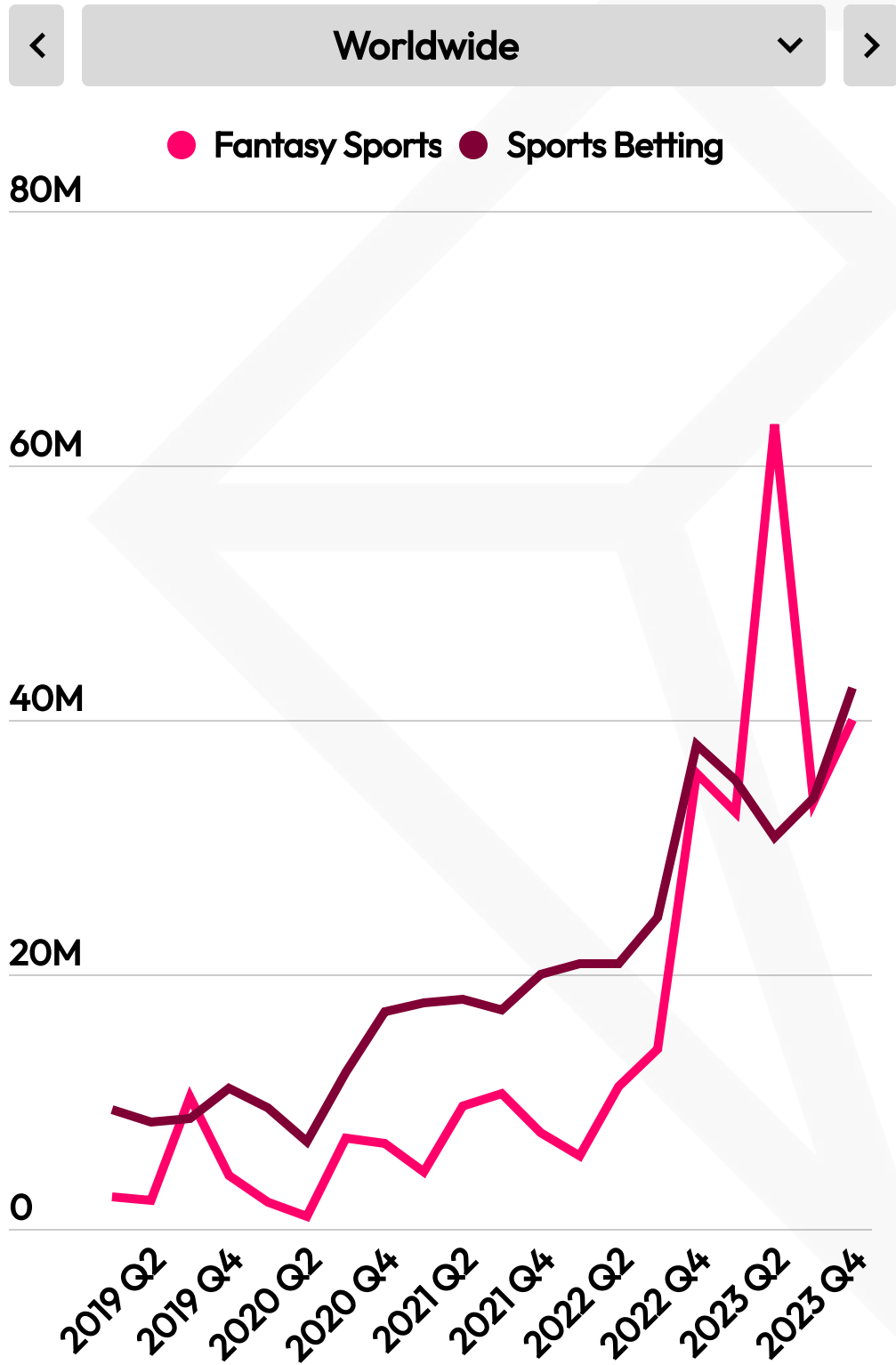
	App	Subgenre
1	Dream11	Fantasy Sports
2	My11Circle	Fantasy Sports
3	Howzat	Fantasy Sports
4	DraftKings Sportsbook & Casino	Sports Betting
5	FanDuel Sportsbook	Sports Betting
6	SportyBet – Sports Betting App	Sports Betting
7	bet365 Sports	Sports Betting
8	MyTeam11	Fantasy Sports
9	PrizePicks	Fantasy Sports
10	Cricket Exchange Fantasy	Fantasy Sports

You Can Bet On It! Sports Apps Let Users Feel Like They are a Part of the Action

The legalization of sports betting in the United States has prompted a surge in adoption over the past three years. Sports Betting has now surpassed Fantasy Sports in terms of new downloads, reaching more than 12 million downloads in Q4 2023.

Fantasy Sports apps peak in the US at the start of National Football League season, while Sports Betting is highest in Q1 with March Madness and the Super Bowl as marquee events.
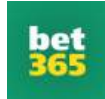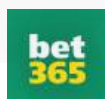
Globally, the surge in Fantasy Sports apps is largely due to their emergence in India, where fantasy cricket apps like Dream11, My11Circle, and Howzat are the among the most popular Fantasy Sports apps in the world.

The most recent new competitor in the United States sports betting market came from sports giant ESPN, which launched ESPN BET in November 2023. Track its performance with data.ai Intelligence.

2023 Rankings by Market | Sports

	AMER - Downloads	AMER - Consumer Spend	APAC - Downloads	APAC - Consumer Spend	EMEA - Downloads	EMEA - Consumer Spend
	Worldwide	**United States**	**Canada**	**Mexico**	**Brazil**	**Argentina**	**Colombia**	**Chile**	**Peru**

Rank	Worldwide	United States	Canada	Mexico	Brazil	Argentina	Colombia	Chile	Peru
1	Dream11 (Sports | Fantasy Sports)	ESPN (Sports | Live Sports)	bet365 Sports (Sports | Sports Betting)	Caliente Sports (Sports | Sports Betting)	365Scores (Sports | Sports News)	TV Argentina fútbol en vivo (Sports | Sports News)	BetPlay (Sports | Sports Betting)	Incorrecto (Sports | Sports News)	BeSoccer (Sports | Sports News)
2	My11Circle (Sports | Fantasy Sports)	FOX Sports (Sports | Live Sports)	Sportsnet (Sports | Live Sports)	F1 TV (Sports | Live Sports)	Sportingbet Livescore Oficial (Sports | Sports News)	tv argentina en vivo futbol (Sports | Live Sports)	Wplay.co (Sports | Sports Betting)	Estacion perfecta (Sports | Sports News)	FlashScore (Sports | Sports News)
3	Cricbuzz Cricket (Sports | Sports News)	FanDuel Sportsbook (Sports | Sports Betting)	TSN GO (Sports | Live Sports)	bet365 Sports (Sports | Sports Betting)	Benacional (Sports | Sports News)	365Scores (Sports | Sports News)	365Scores (Sports | Sports News)	Cuartos de final (Sports | Sports News)	Mundo Futbol (Sports | Sports News)
4	ESPN (Sports | Live Sports)	DraftKings Sportsbook & Casino (Sports | Sports Betting)	FanDuel Sportsbook & Casino CA (Sports | Sports Betting)	Onefootball (Sports | Sports News)	FlashScore (Sports | Sports News)	tv futbol en vivo (Sports | Live Sports)	BeSoccer (Sports | Sports News)	Estadio Tnt Sports (Sports | Live Sports)	Incorrecto (Sports | Sports News)
5	FlashScore (Sports | Sports News)	PrizePicks (Sports | Fantasy Sports)	TeamSnap (Sports | Other Sports)	TUDN (Sports | Live Sports)	Onefootball (Sports | Sports News)	Onefootball (Sports | Sports News)	Futbolero plus (Sports | Sports News)	Rayo (Sports | Sports News)	Futbolero plus (Sports | Sports News)

Other Industries Embracing Mobile

Hybrid work prevails, language learning apps boom, and the search for love commands share of wallet despite tightening purse strings.

Honda is striving to understand customers as the automotive industry undergoes a historic transformation. We are using various initiatives to determine customers ever changing value and need, and will utilize mobile data to provide sustainable value and best mobility solutions.

Tsutomu Ogawa

Manager Chief Engineer
Foundation Development of Customer Understanding Department
Data-driven Solution Development Division

HONDA

User Monetization: Consumer Spend vs. Average MAU in 2023

< **Argentina** ⌄ >

Chart: Consumer Spend ($) vs. Average MAU
- Y-axis: Consumer Spend ($), from 0 to 4M
- X-axis: Average MAU, from 0 to 2M
- Quadrants: ARPU Leaders, Heavy Hitters, Average Performers, ARPU Strugglers
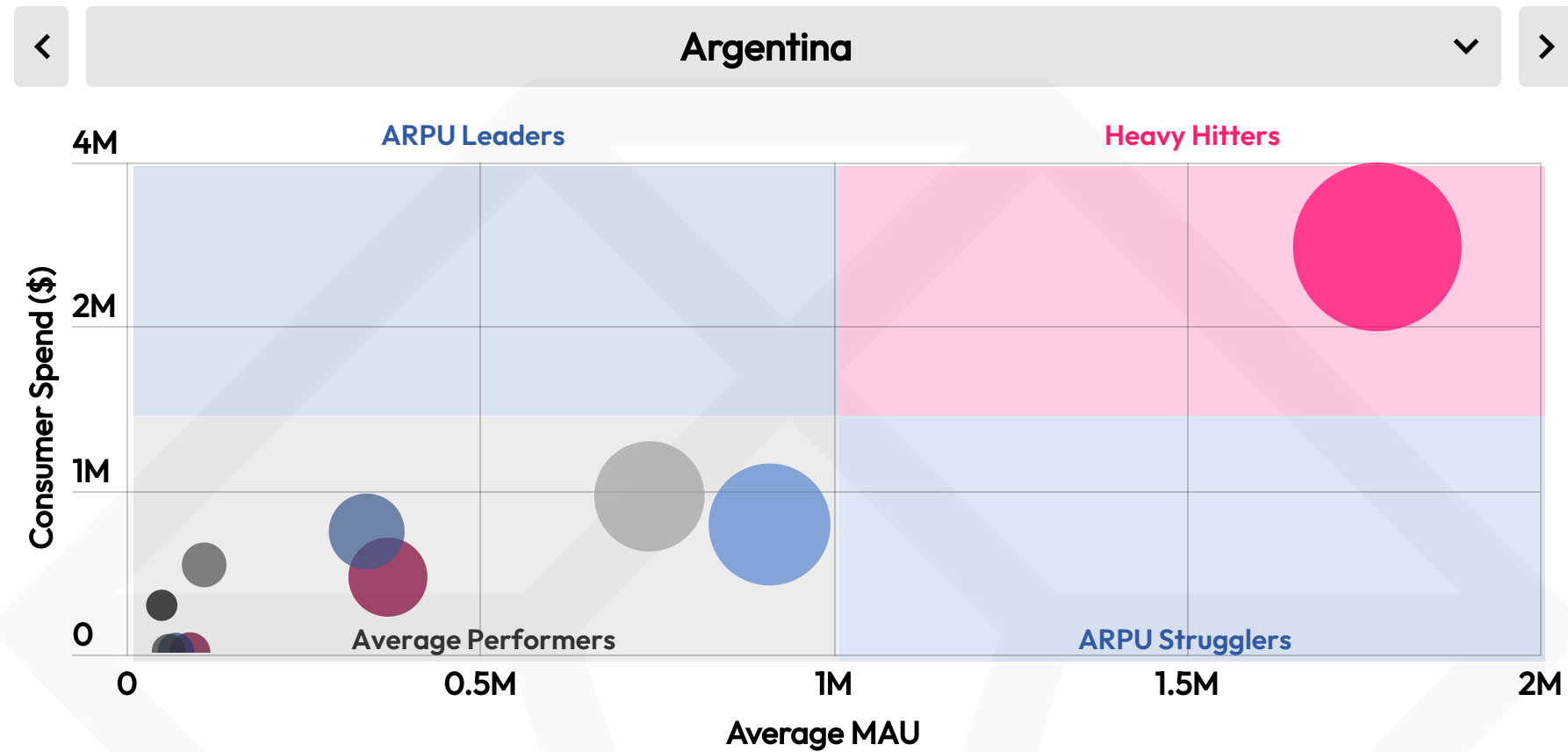
Usage Stickiness: Open Rate vs. Average Active Days in 2023
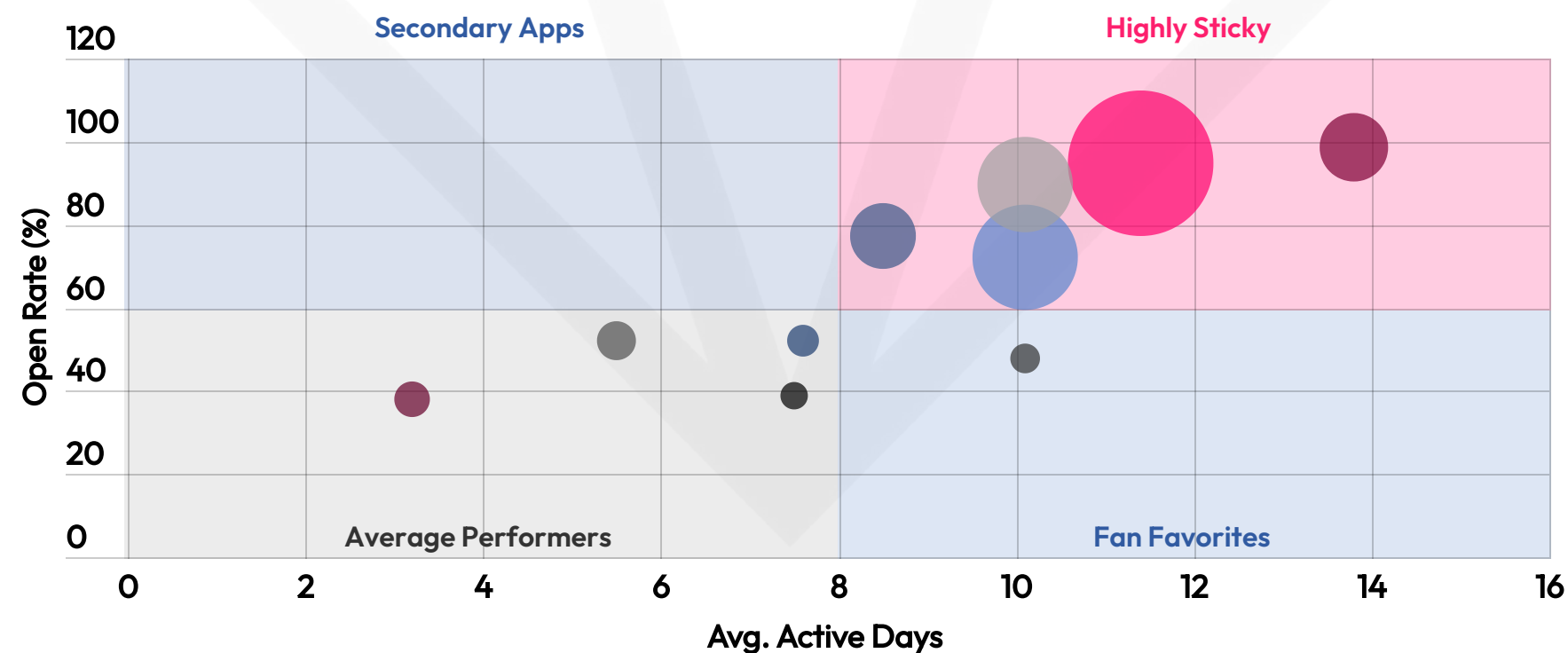
Chart: Open Rate (%) vs. Avg. Active Days
- Y-axis: Open Rate (%), from 0 to 120
- X-axis: Avg. Active Days, from 0 to 16
- Quadrants: Secondary Apps, Highly Sticky, Average Performers, Fan Favorites

Source: data.ai Intelligence | Note: Consumer Spend across iOS, Google Play; China is iOS only. MAU across iOS and Android. Average active days and open rate are Android only. Spend is gross — inclusive of any percent taken by the app stores. Dating apps are classified using data.ai's App IQ taxonomy.
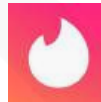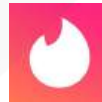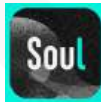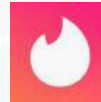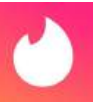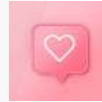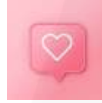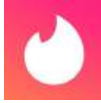
Dating Apps Adjust to Post-Pandemic Behavior

Perhaps counterintuitively, Dating app usage surged at the start of the pandemic even as people were stuck at home. Dating apps provided a useful way for people to socialize, if not in person, on their mobile devices. A number of apps aimed at finding friends also emerged, including Wizz, Yubo and Wink.

Consumer spend growth has slowed in some key markets like the US and China as Dating behaviors continue to adjust to a post-lockdown world. Developing markets show more opportunity. Discover the state of the dating market in 2023: which apps are the best performers in terms of monetizing users and encouraging them to keep using the apps.

Take our course on how to get the most out of Insights Generator

2023 Rankings by Market | Dating & Friend-Finding

	AMER – Downloads								AMER – Consumer Spend / APAC – Downloads	APAC – Downloads / APAC – Consumer Spend			EMEA – Downloads		EMEA – Consumer Spend	
Rank	Worldwide	United States	Canada	Mexico	Brazil	Argentina	Colombia	Chile	Peru								
1	Tinder	Tinder	Bumble App	Tinder	Tinder	Tinder	Tinder	Tinder	Badoo	Tinder	Soul – 跟随灵魂找到你	Tinder	With	Glamour – Live calling anytime	Hinge	Omi	Bumble App
2	Bumble App	Bumble App	Tinder	Bumble App	Badoo	Badoo	Badoo	Grindr	Tinder	Bumble App	Momo	WIPPY	Pairs	Bliss Live	Tinder	Tantan	Tantan
3	Badoo	Hinge	Hinge	Badoo	happn	Kismia	Bumble App	Badoo	Kismia	Badoo	心遇-用真心，遇见你	중년천국	Tinder	QuackQuack	Bumble App	Heat Up	Tinder
4	SweetMeet by Flintcast	Wizz	Wizz	Kismia	JAUMO	Bumble App	Kismia	Kismia	Bumble App	SweetMeet by Flintcast	Tantan	Datalk	tapple	BlissU	Wizz	Similar-Meet & Match soulmates	Omi
5	Omi	Plenty of Fish Dating	Badoo	Grindr	Bumble App	happn	Evermatch	Bumble App	Omi	他趣	Maum – Friendly Voice Chat	GRAVITY (グラビティ)	Tinder	Plenty of Fish Dating	PopUp – Chat, Friend, …	Hinge	

Source: data.ai Intelligence | Note: Top Apps by yearly Downloads and Consumer Spend across iOS, Google Play. Dating apps are classified using data.ai's App IQ taxonomy.as of Jan 4, 2024.

Ticketing Apps in Higher Demand Than Ever as Consumers Flock to In-Person Events

In-person events, which came roaring back in 2022, were even more popular in 2023. Global downloads hit a new high in Q3 2023 at 82.5 million, up 33% year-over-year and 77% from pre-pandemic Q3 2019.

With the red-hot demand for ticketing apps came fiercer competition. The share of downloads from paid channels trended up throughout 2023. By the end of the year, more than 12% of global Ticket Service downloads and 34% of US downloads came from paid search or in-app ads.

Keep up with the latest advertising strategies in an increasingly competitive space

Ticket Service Quarterly App Downloads

Worldwide

● Ticketmaster ● BookMyShow ● Damai.cn ● Eventbrite ● AXS ● Other
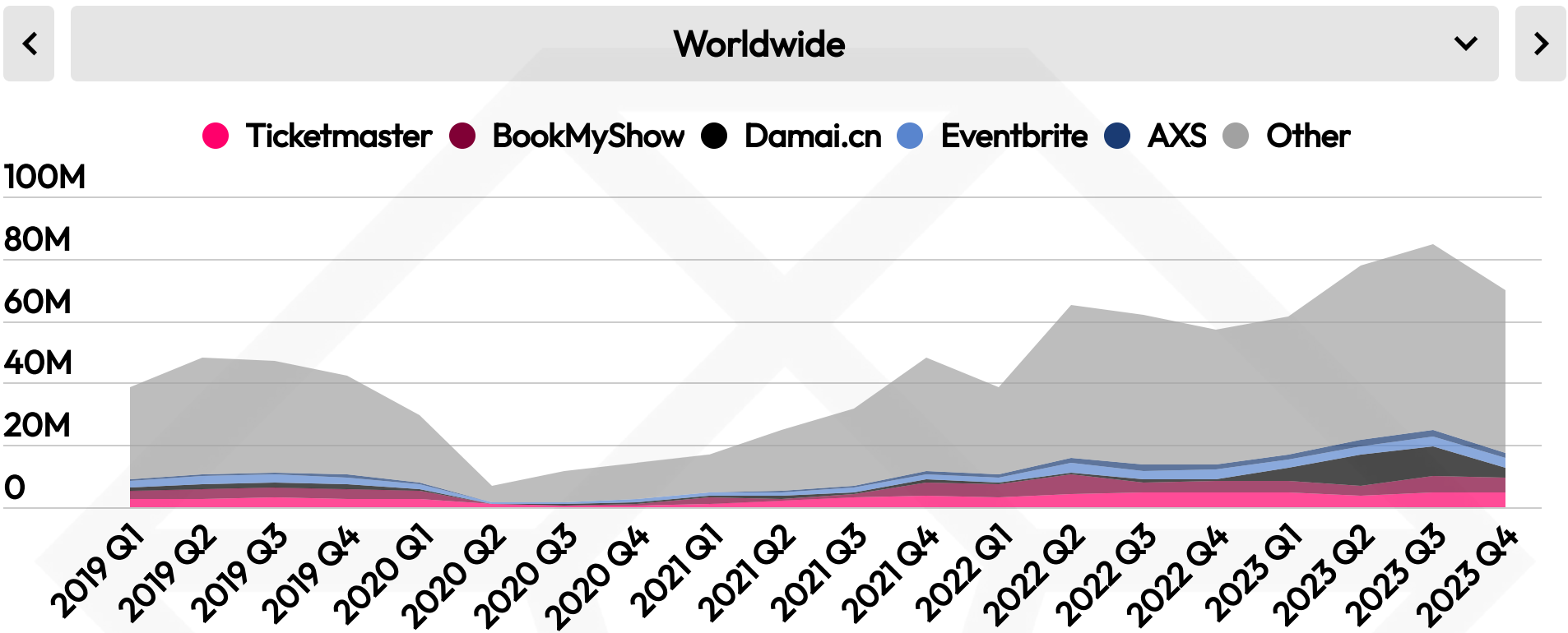
Download Channel Since 2021 Q2

● Organic Search ● Organic Featured
● Paid Search ● Paid In-App Ads
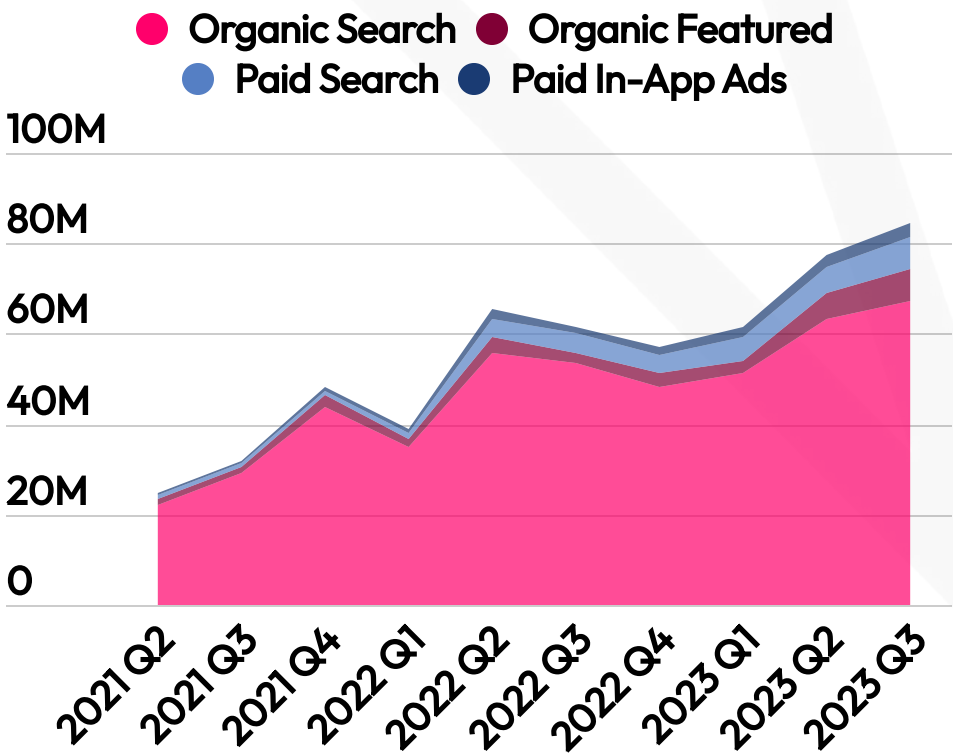
Share by Download Channel

● Organic Search ● Organic Featured
● Paid Search ● Paid In-App Ads
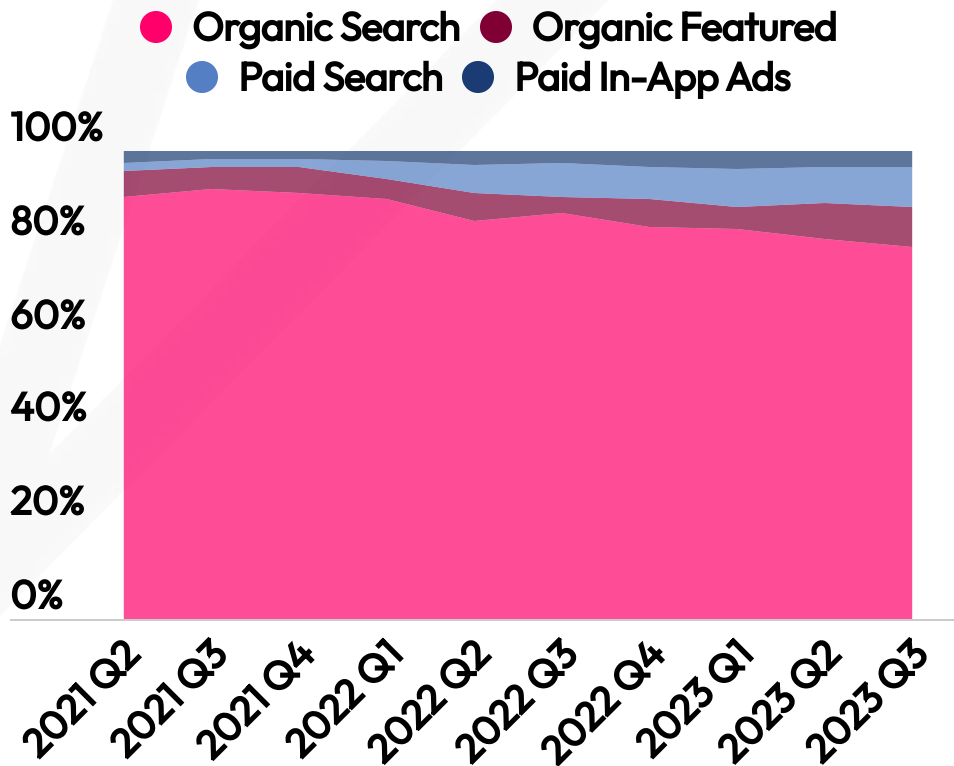
Source: data.ai Intelligence | Note: Downloads across iOS, Google Play; China is iOS only. Download channel data available starting 2021 Q2. Ticket Service apps are classified using data.ai's App IQ taxonomy.

Top Apps & Games

Community, connection and self-expression in a video-first world.

As privacy requirements continue to affect the efficiency of acquiring users, mobile gaming companies are rethinking how to approach audience growth. IP, Transmedia, and enhanced focus on Community will be key levers for further growth, while the Digital Markets Act will open new opportunities through increased competition across iOS and Android.

Luis de la Camara
VP of Marketing at Rovio

ROVIO

2023 Rankings by Market | Top Apps

Worldwide

DOWNLOADS

#	App	Category
1	TikTok	Entertainment | Short Videos
2	Instagram	Social Media | Media Sharing Networks
3	Facebook	Social Media | Social Networks
4	WhatsApp Messenger	Social Media | Communication
5	CapCut	Photo & Video | Video Editing
6	Telegram	Social Media | Communication
7	Snapchat	Social Media | Media Sharing Networks
8	WhatsApp Business	Business | Business Communication
9	Facebook Messenger	Social Media | Communication
10	Threads	Social Media | MicroBlogging

CONSUMER SPEND

#	App	Category
1	TikTok	Entertainment | Short Videos
2	YouTube	Entertainment | Video Sharing
3	Disney+	Entertainment | OTT
4	Tinder	Social Media | Dating
5	Google One	Utility & Productivity | File Management
6	Max: Stream HBO, TV, & Movies	Entertainment | OTT
7	piccoma	Books & Reference | Comics
8	Bumble App	Social Media | Dating
9	LinkedIn	Business | Integrated Career Platform
10	Audible	Books & Reference | Audio Books

MONTHLY ACTIVE USERS

#	App	Category
1	Facebook	Social Media | Social Networks
2	WhatsApp Messenger	Social Media | Communication
3	Instagram	Social Media | Media Sharing Networks
4	Facebook Messenger	Social Media | Communication
5	TikTok	Entertainment | Short Videos
6	Telegram	Social Media | Communication
7	Amazon	Shopping | E-Commerce
8	Spotify	Entertainment | Music & Audio
9	X	Social Media | MicroBlogging
10	Snapchat	Social Media | Media Sharing Networks

Note: Downloads and consumer spend based on combined iOS App Store and Google Play. MAU based on Combined iPhone and Android Phone Monthly Active Users; Excluding pre-installed Apps. Market-level rankings. App Genres are classified using data.ai's App IQ taxonomy.as of Jan 4, 2024.

2023 Rankings by Market | Top Games

DOWNLOADS

#	Game	Genre
1	Subway Surfers	Action | Runner
2	Free Fire	Shooting | Battle Royale
3	ROBLOX	Simulation | Creative Sandbox
4	Ludo King	Tabletop | Ludo
5	Candy Crush Saga	Match | M3
6	Royal Match	Match | M3-Meta
7	Block Blast Adventure Master	Puzzle | Tile-Matching
8	8 Ball Pool	Sports | Simulation Sports
9	My Talking Tom 2	Simulation | Pet
10	Race Master	Hypercasual | Racing

CONSUMER SPEND

#	Game	Genre
1	Candy Crush Saga	Match | M3
2	Honor of Kings	Action | MOBA
3	ROBLOX	Simulation | Creative Sandbox
4	Royal Match	Match | M3-Meta
5	Coin Master	Party | Luck Battle
6	Genshin Impact	RPG | Open World RPG
7	Gardenscapes by Playrix	Match | M3-Meta
8	Monopoly GO: Family Board Game	Party | Luck Battle
9	Pokémon GO	RPG | Location RPG
10	Game For Peace	Shooting | Battle Royale

MONTHLY ACTIVE USERS

#	Game	Genre
1	ROBLOX	Simulation | Creative Sandbox
2	Free Fire	Shooting | Battle Royale
3	Candy Crush Saga	Match | M3
4	Subway Surfers	Action | Runner
5	Minecraft Pocket Edition	Simulation | Creative Sandbox
6	Mobile Legends: Bang Bang	Action | MOBA
7	Ludo King	Tabletop | Ludo
8	Stumble Guys	Party | Party Royale
9	EA SPORTS FC™ MOBILE 24 SOCCER	Sports | Simulation Sports
10	PUBG MOBILE	Shooting | Battle Royale

Note: Downloads and consumer spend based on combined iOS App Store and Google Play. MAU based on Combined iPhone and Android Phone Monthly Active Users; Excluding pre-installed Apps. Market-level rankings. Game Genres are classified using data.ai's Game IQ taxonomy.as of Jan 4, 2024.

2023 Rankings by Market | Top Companies - Apps

Worldwide

DOWNLOADS

	Company	HQ		Top Apps by Downloads
1	Meta	United States		Instagram
2	Google	United States		YouTube
3	ByteDance	China		TikTok
4	Microsoft	United States		Microsoft Teams
5	Alibaba Group	China		Alibaba.com
6	Amazon	United States		Amazon
7	InShot Inc	China		InShot
8	Tencent	China		WeChat
9	ABISHKKING	Hong Kong		Home Workout – No Equipments
10	Walmart	United States		PhonePe

CONSUMER SPEND

	Company	HQ		Top Apps by Consumer Spend
1	Google	United States		YouTube
2	ByteDance	China		TikTok
3	Disney	United States		Disney+
4	Match Group	United States		Tinder
5	Warner Bros. Discovery	United States		Max: Stream HBO, TV, & Movies
6	Amazon	United States		Audible
7	Tencent	China		Tencent Video
8	Microsoft	United States		LinkedIn
9	Kakao piccoma Corp	Japan		piccoma
10	Bumble	United States		Bumble App

Source: data.ai Note: Combined iOS and Google Play; China is iOS only; Market-level rankings

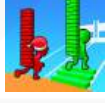# 2023 Rankings by Market | Top Companies – Games
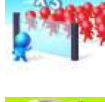
| | Worldwide | | | | | | | |
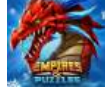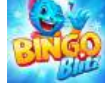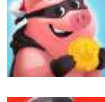
DOWNLOADS

	Company	HQ		Top Apps by Downloads
1	Azur Interactive Games	Cyprus		WormsZone.io
2	Tencent	China		Subway Surfers
3	OneSoft	Vietnam		1945 Air Forces
4	Unity Technologies	United States		Bridge Race
5	SayGames	Cyprus		Race Master
6	Embracer Group	Sweden		Phone Case DIY
7	BabyBus	China		Ice Cream Bar Factory
8	Take Two Interactive	United States		Parking Jam 3D
9	Voodoo	France		Mob Control
10	Jinke Culture – Outfit7	China		My Talking Tom 2

CONSUMER SPEND

	Company	HQ		Top Apps by Consumer Spend
1	Tencent	China		Honor of Kings
2	Activision Blizzard	United States		Candy Crush Saga
3	Playrix	Ireland		Gardenscapes by Playrix
4	miHoYo	China		Genshin Impact
5	NetEase	China		Eggy Party
6	Take Two Interactive	United States		Empires & Puzzles
7	Playtika	Israel		BINGO Blitz
8	Netmarble	South Korea		Marvel Contest of Champions
9	Moon Active	Israel		Coin Master
10	Scopely	United States		Monopoly GO: Family Board Game

Source: data.ai Note: Combined iOS and Google Play; China is iOS only; Market-level rankings

Customer Testimonial

"In the dynamic world of mobile gaming, SciPlay's rise epitomizes agility, strategic focus, and player-centricity. In 2023, we achieved elevated ARPPU, robust retention and impressive player-to-payer conversion, all attained by fine tuning our products and tailoring marketing campaigns to better align with players' needs and preferences. Market data, including data provided by data.ai, has played a critical role in shaping SciPlay's strategy by providing valuable insights into industry trends, consumer behavior and competitive landscapes. It serves as a foundation for informed decision-making, risk assessment, opportunity identification and understanding our current and future market position."

Noga Halperin
Chief Revenue Officer

"At Orange, we offer a wide range of mobile applications across our footprint in Europe and Africa. These apps are essential for our customers to access our services and engage with us. To continuously optimize every step of the conversion funnel, data.ai Intelligence helps us in benchmarking the market, getting inspired, and fine-tuning our apps. This is key for our growth strategy."

Jean-Pierre Combe
Head of Orange Mobile Apps
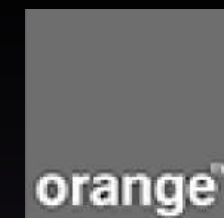
Customer Testimonial

"We mainly use data.ai for market research and competitor analysis. Among other things, data.ai is extremely useful in identifying emerging dating markets with global potential and benchmarking the effectiveness of our monetization strategy among our peers."

Benjamin Lorthiois
Chief Revenue Officer

"Launching a new game on the market, regardless of the category or size, continues to be very challenging. There is no recipe that guarantees success. It is essential to develop in-house structures that allow us to obtain and analyze solid data, as well as receive constant input from the market. Following best practices in the different fields mitigates risks and results in slow but steady growth."

Jeannie Odreman
Director Mobile Publishing

Customer Testimonial

"data.ai is a huge help for mobile game practitioners, allowing us to keep up with industry trends. With market size and business insight data, we can quickly understand global market trends and conduct in-depth comparative analysis with leading products."

Dongke Wang
Marketing Director

ONEИT

"Since its launch in 2018, Dreame has been widely cherished by users worldwide. We are delighted to serve as advocates for online literature, creating a spiritual haven for enthusiasts and creators alike. Additionally, we have accompanied numerous writing enthusiasts on their journey to becoming professional authors. Outstanding content not only garners favor among local readers but also possesses the power to transcend borders, races, and languages. We are committed to building a diverse content ecosystem, continuing to inspire talented writers to create high-quality content and bring joy to literature enthusiasts."

Dreame

Customer Testimonial

"As the leading and pioneer of global Real-Time Engagement RTE-PaaS Cloud, we can seize opportunities and trends of global RTE markets, and provide strong supports for our clients through data.ai."

Carol Zhang
Director of Strategy, Shengwang

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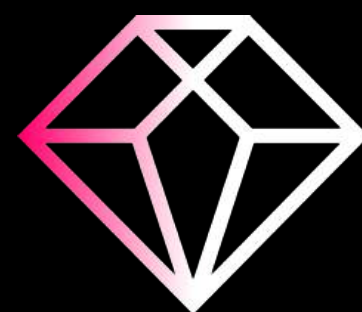
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