



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 >](#)

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 >](#)

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 >](#)

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.

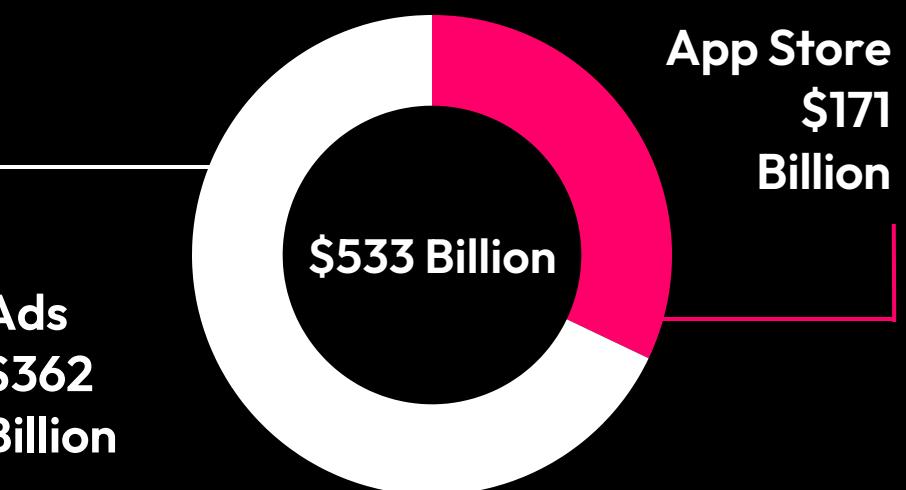
[Learn More >](#)

3 Mobile Goes IRL

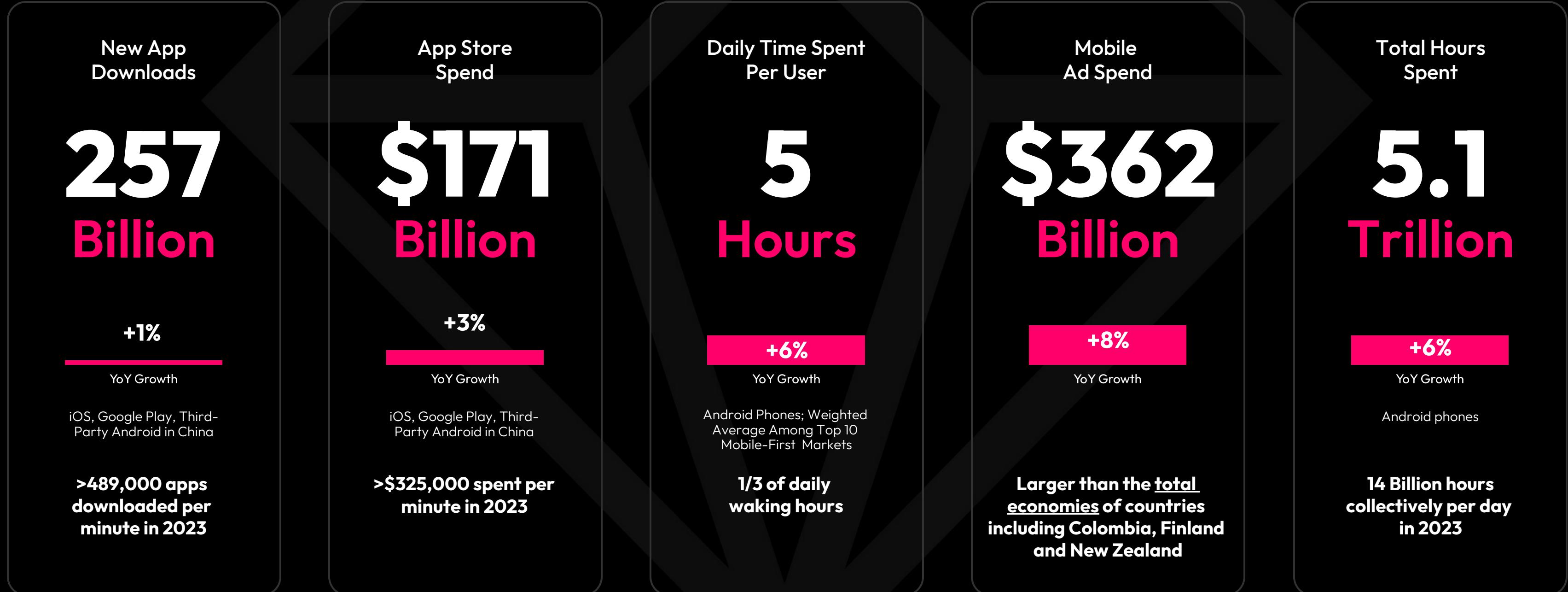
Demand for revenge travel, Swiftie and Bey-Hive fans, and live sports booms — consumers seek real life experiences... but always with their phones in tow.

[Learn More >](#)

Mobile Economy in 2023



2023 Mobile Landscape at a Glance



Contents

01 Macro Mobile Trends

02 AI & Mobile

03 Gaming

04 Finance

05 Retail

06 Video Streaming

07 Social

08 Food & Drink

09 Travel

10 Health & Fitness

11 Sports

12 Other Industries Embracing Mobile

13 Top App & Games of 2023



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
		Google			
	kakao				
					
					
					
					

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



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.](#)





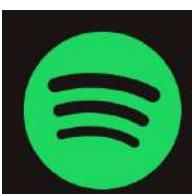
Top Performers by Mobile Performance Score

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 [Pulse iOS app](#).

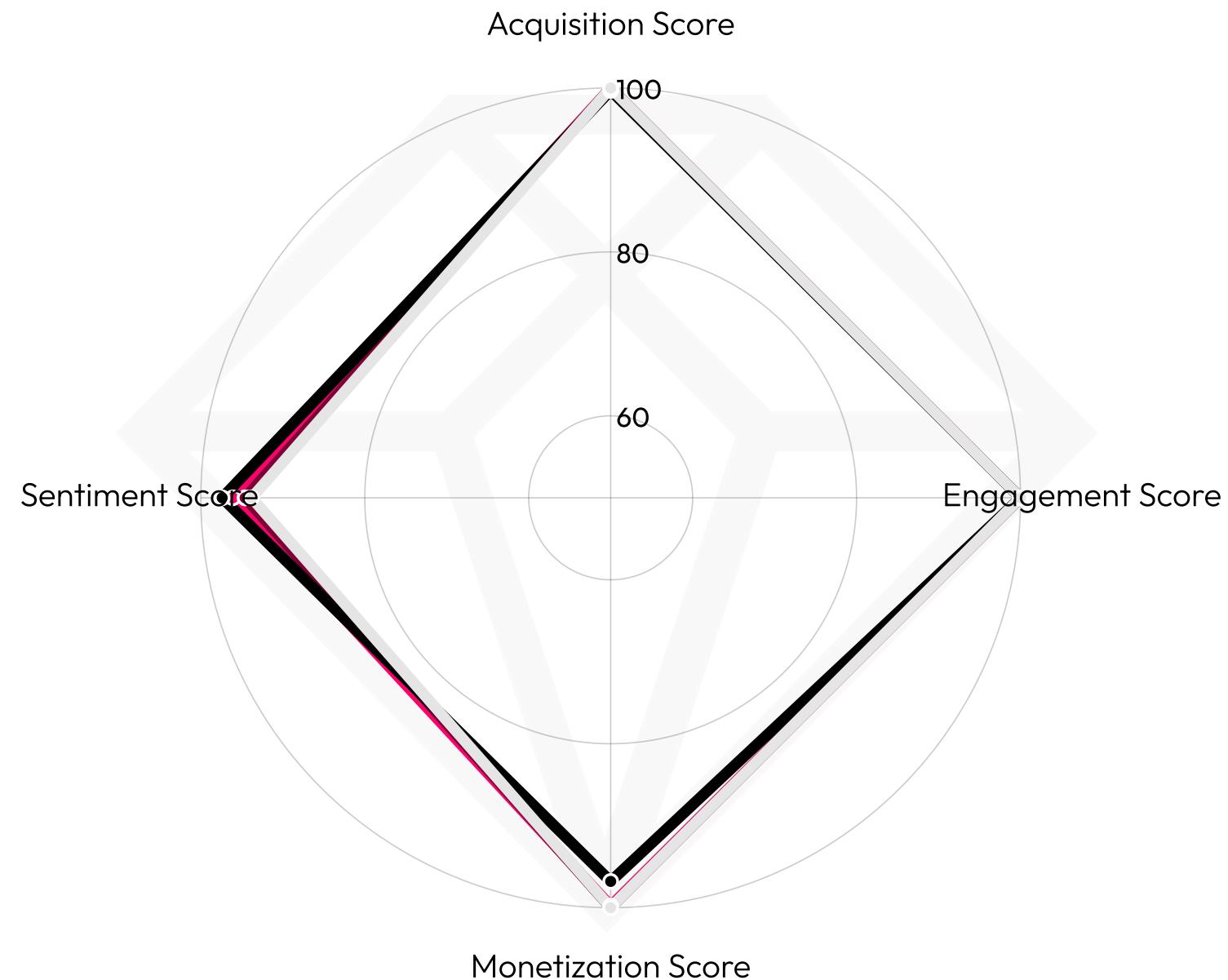
Track Trending apps by their MPS within your genre:

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



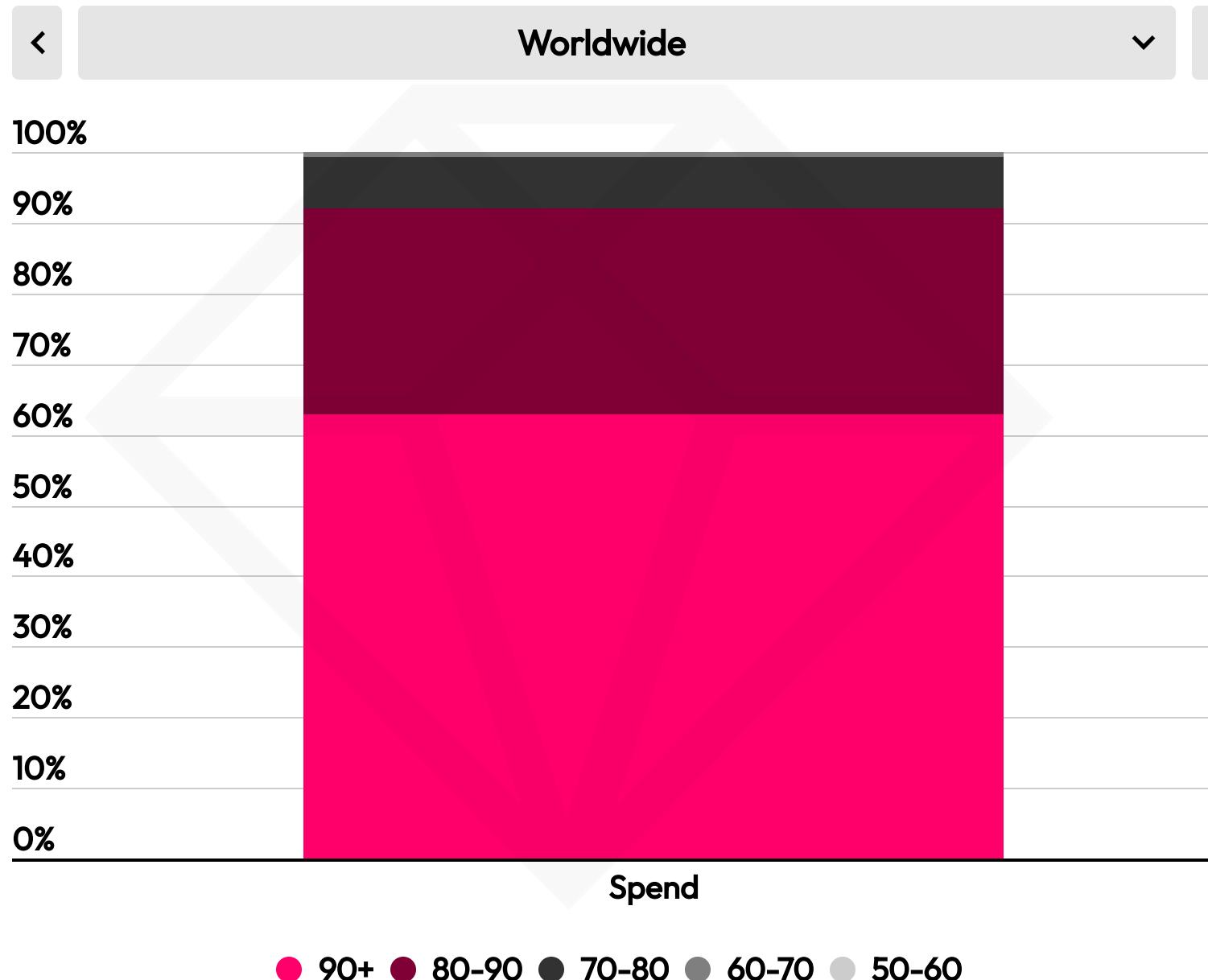
Powered by data.ai's App IQ and Game IQ Taxonomy

Source: data.ai Intelligence | Note: Worldwide, Mobile Performance Score for week ending 23rd December 2023

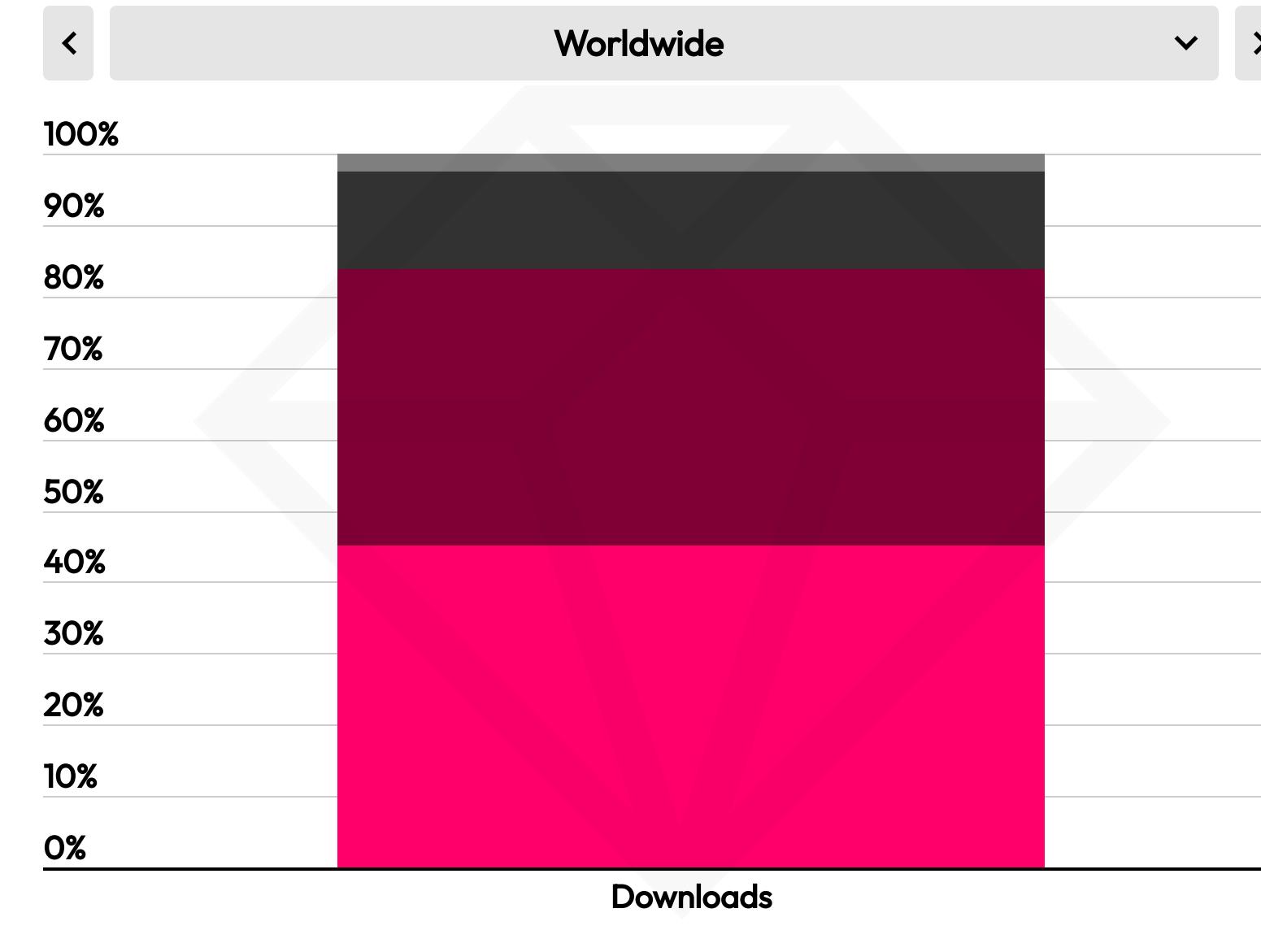


Apps with 80+ MPS Capture More than 90% of Consumer Spend, 80% of Installs

Consumer Spend by MPS Score



Downloads by MPS Score

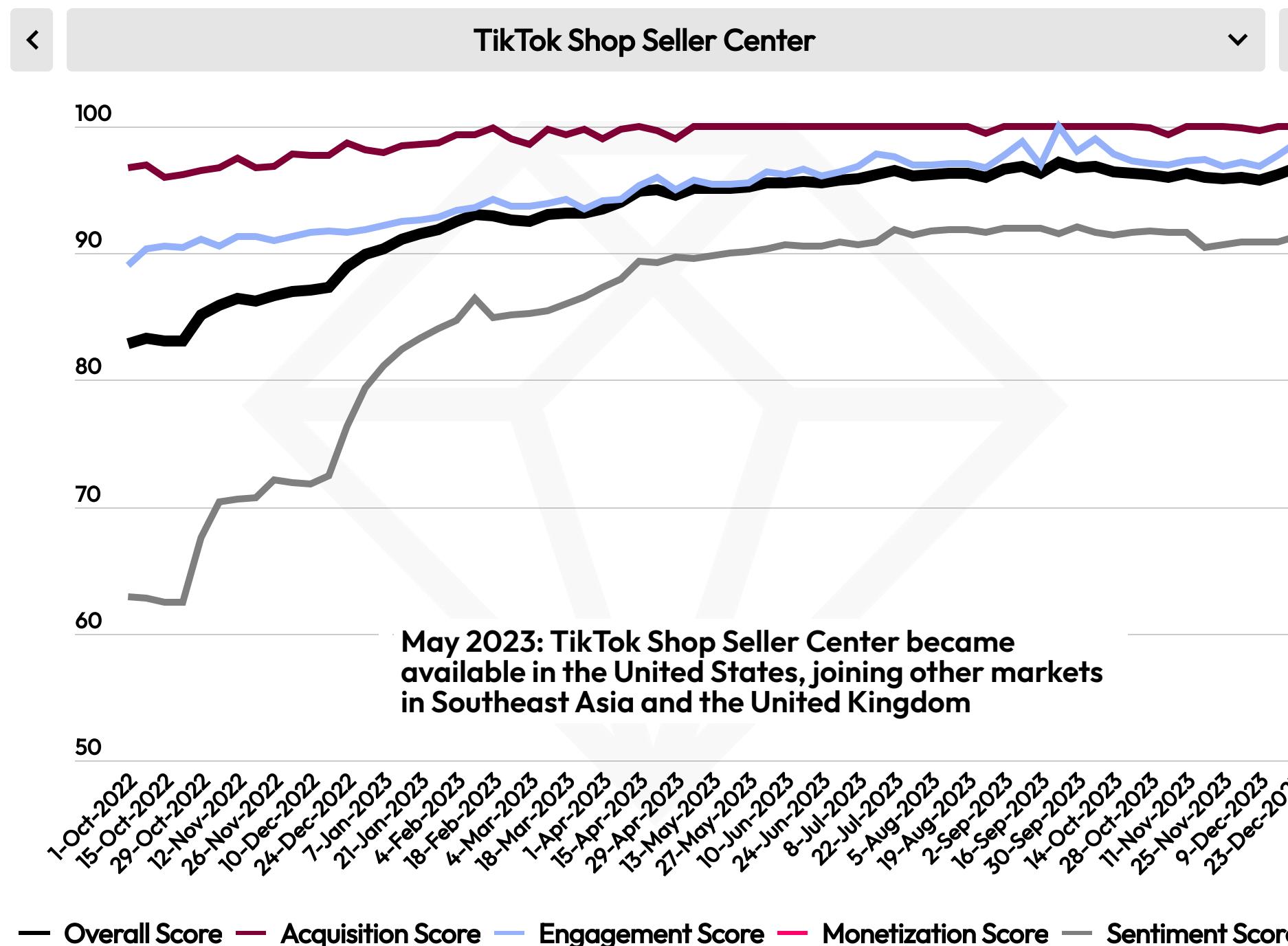


Source: data.ai Intelligence | Note: Excludes apps without a calculated Mobile Performance Score. Apps Mobile Performance Score calculated as the average weekly score in 2023 at the country / genre level.

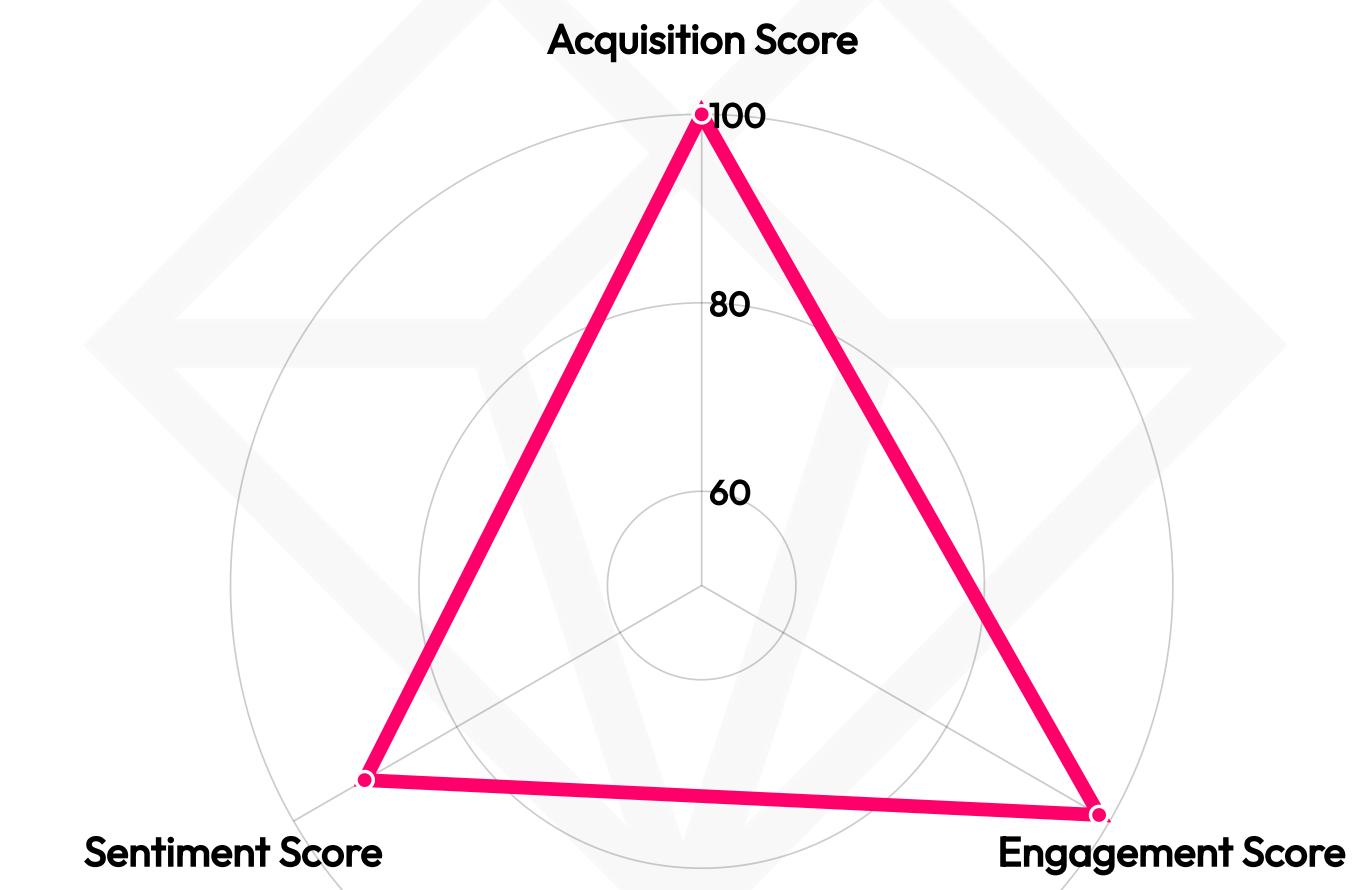


See How Top Breakout Apps in 2023 Improved Their Scores

Global Mobile Performance Scores for Select Apps



Scores the Week of December 23, 2023



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.

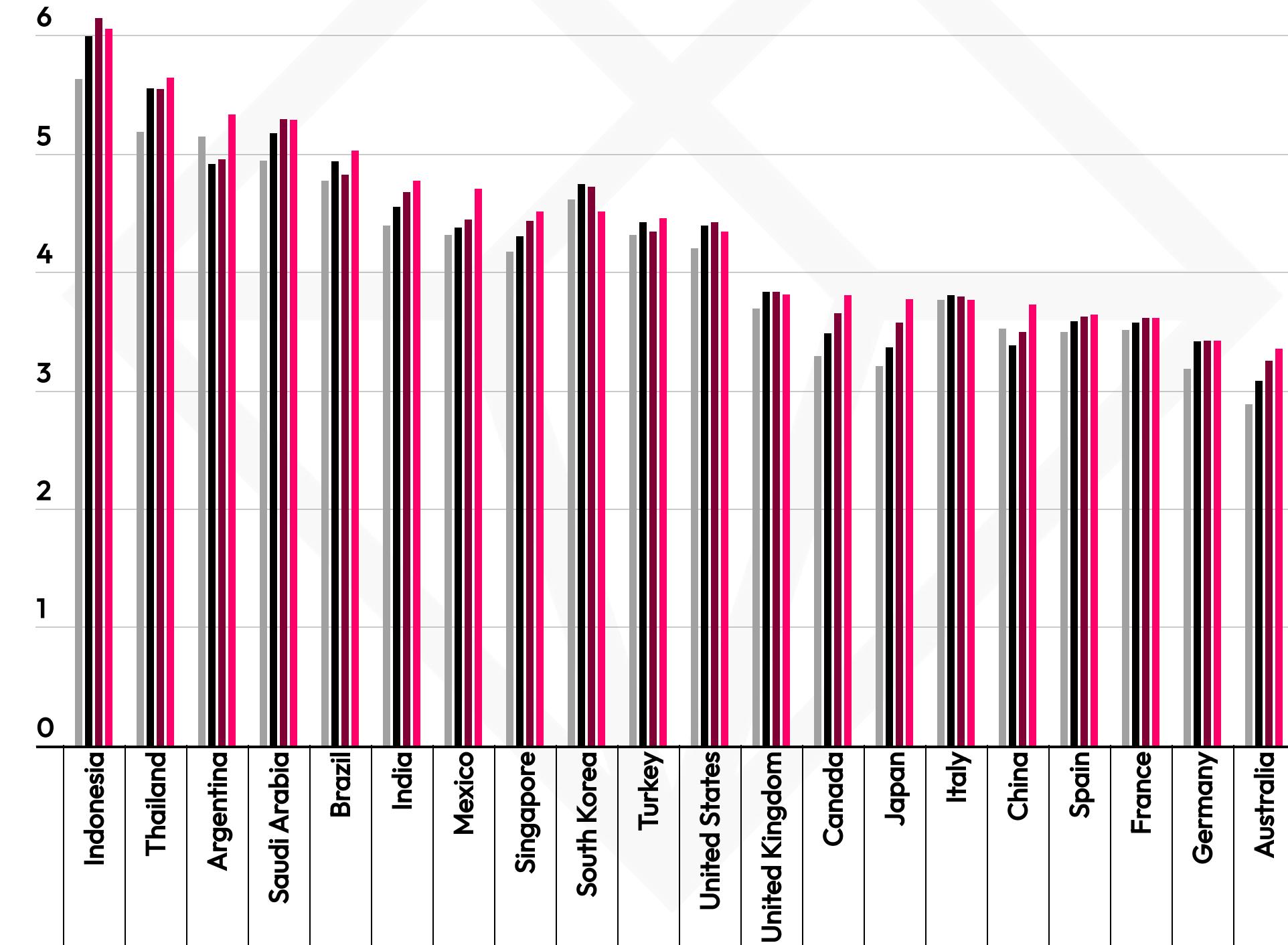
Time spent grew the fastest since 2020 in Japan, Australia and Canada at 18%, 16% and 16%.

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

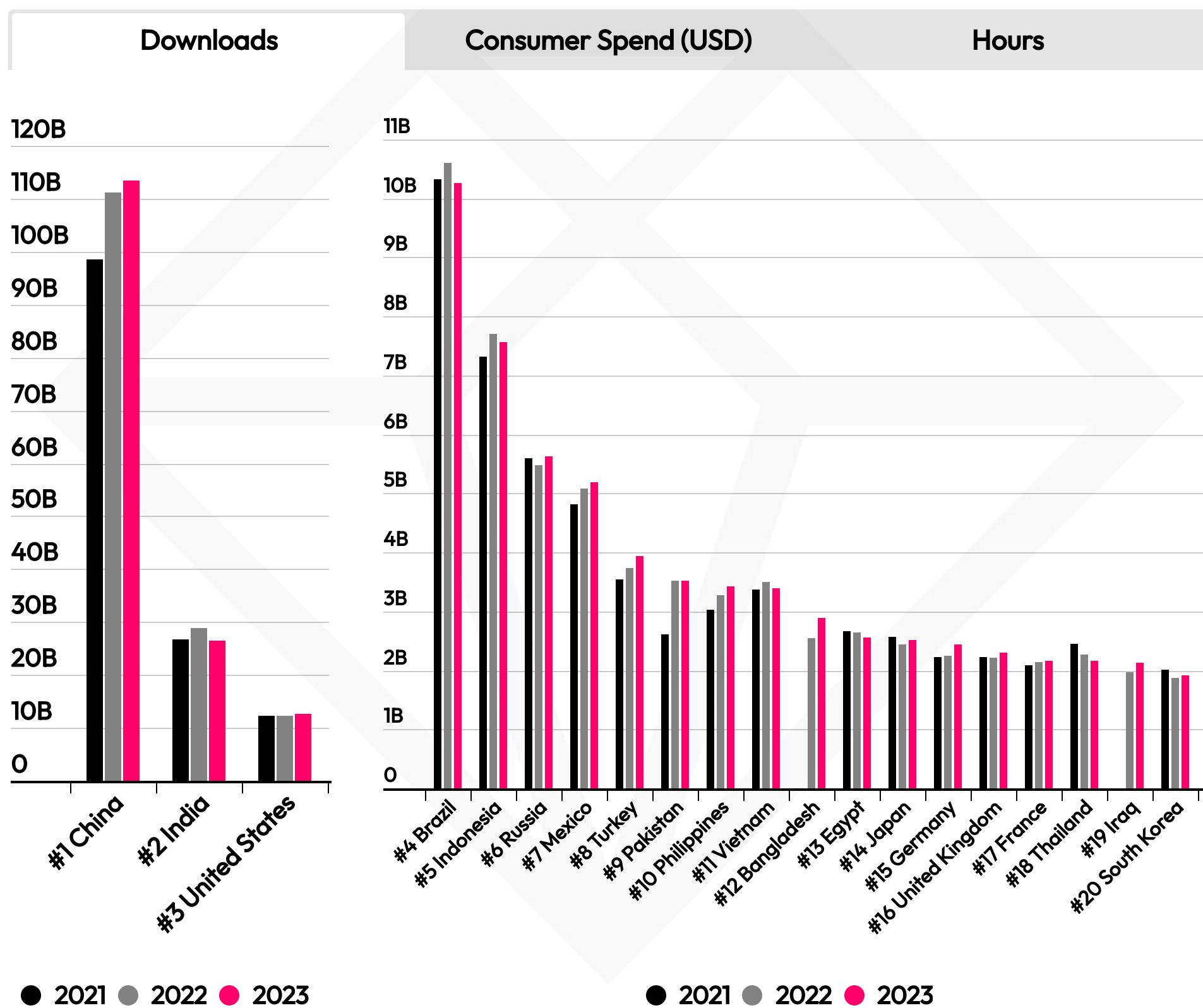
● 2020 ● 2021 ● 2022 ● 2023



Source: data.ai Intelligence | Note: Android phones.



Top 20 Mobile Markets in 2023



Source: data.ai Intelligence | Note: Downloads across iOS, Google Play and third-party Android in China combined; Time spent is Android phones only; Spend is gross — inclusive of any percent taken by the app stores

MACRO MOBILE TRENDS

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.

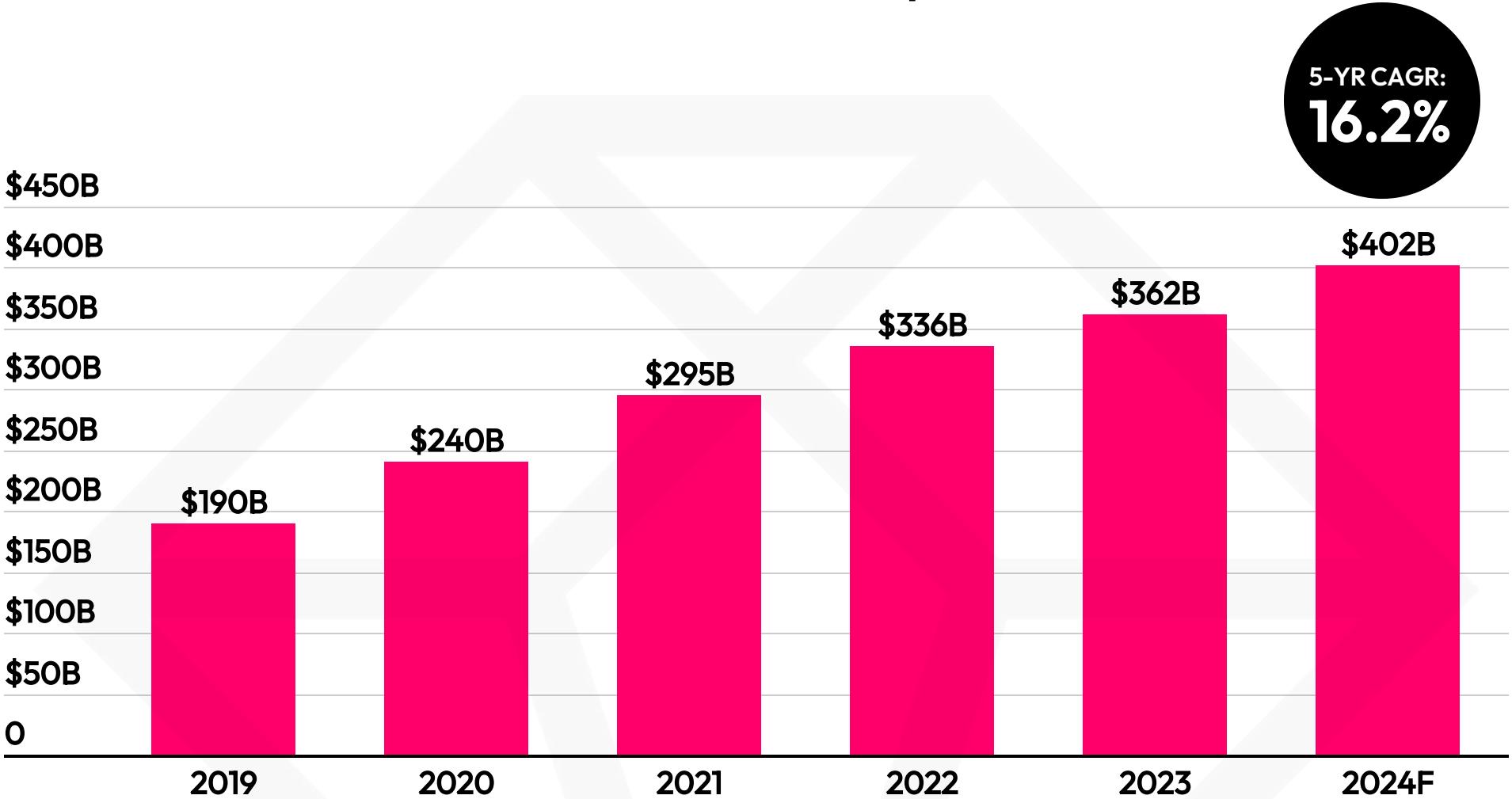
Time spent grew 10% YoY. Consumers in Pakistan (#10 by time spent), South Africa (#19) and Vietnam (#9) grew by 14%, 13% and 12% respectively.

data.ai customer?

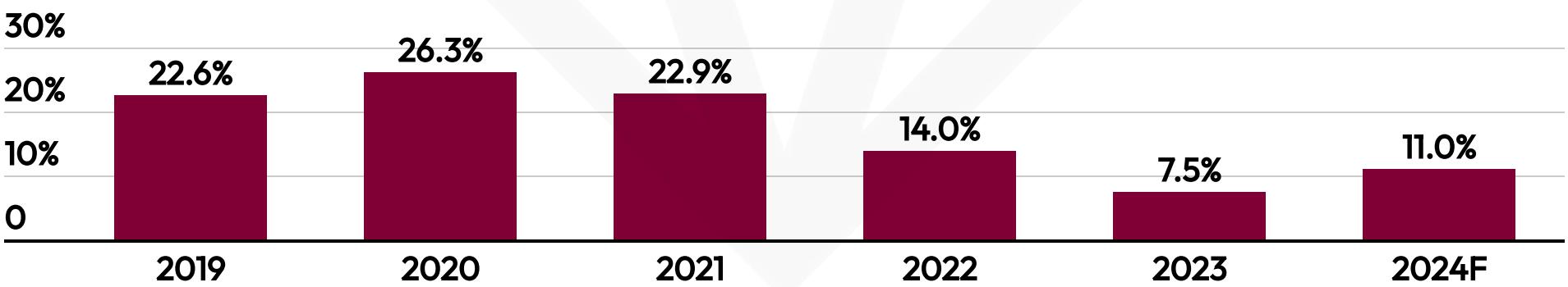
Size the market and keep tabs on fast-growing areas of opportunity in data.ai.



Global Mobile Ad Spend



Year-over-Year Growth



Source: data.ai Intelligence.

MACRO MOBILE TRENDS

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, though 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 social networks by average time spent per user.

Plan with confidence:
[Read our 5 Mobile App Predictions for 2024.](#)

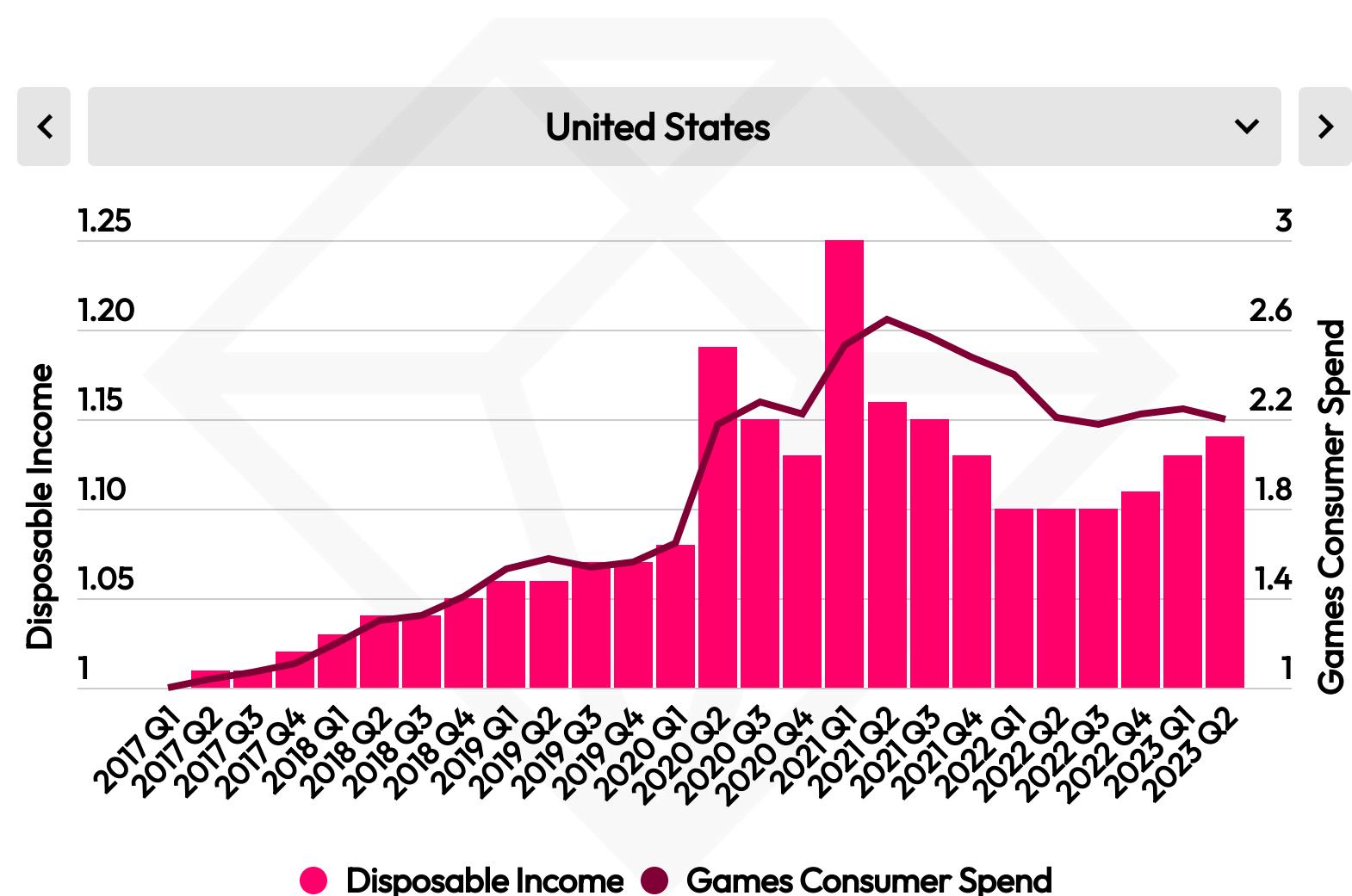


MACRO MOBILE TRENDS

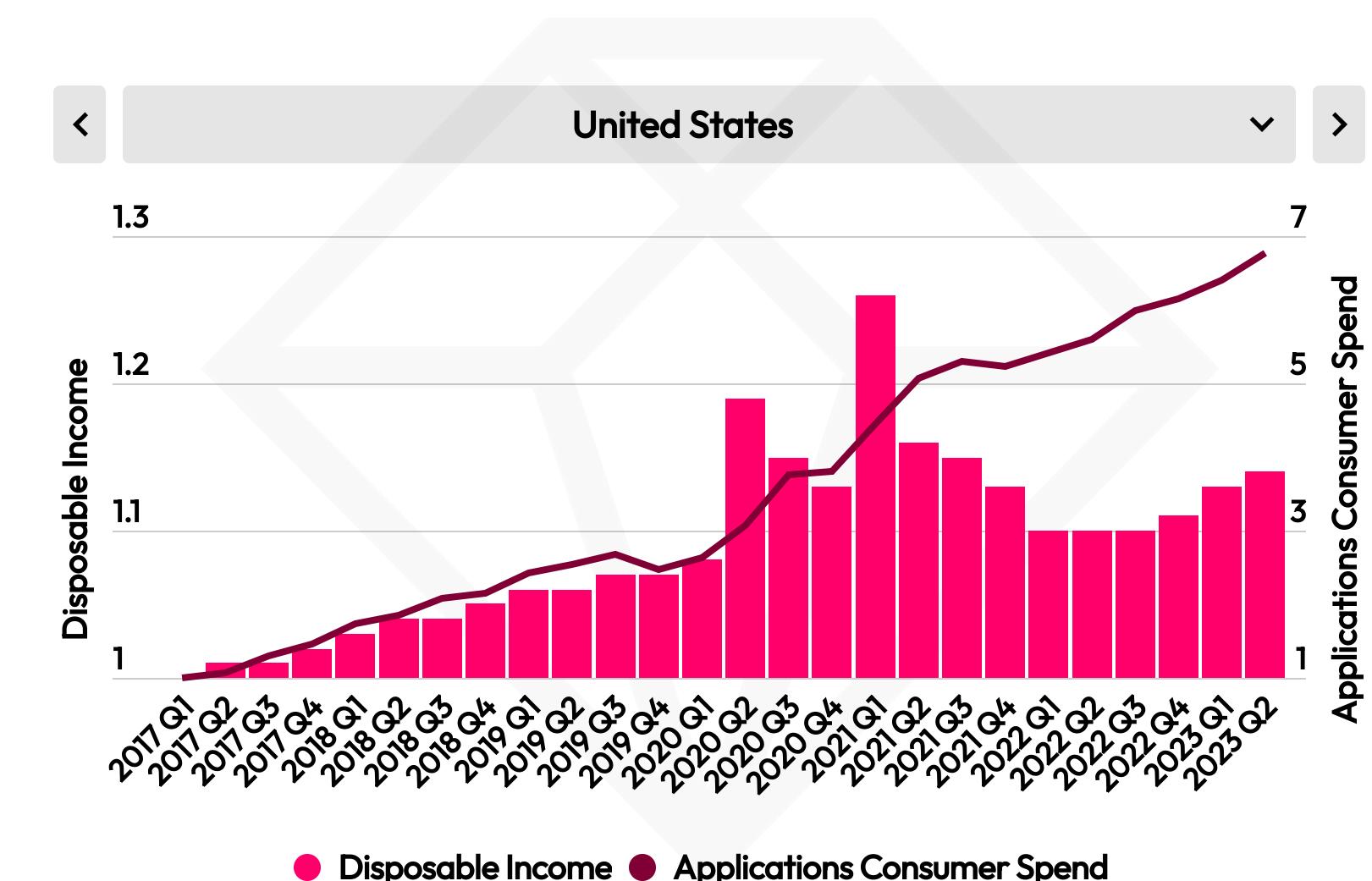
First Time, Then Money: App Spend Climbs During Disposable Income Squeeze as Mobile Takes a Larger Share of Wallet

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



Apps Consumer Spend Growth vs Disposable Income Growth Index

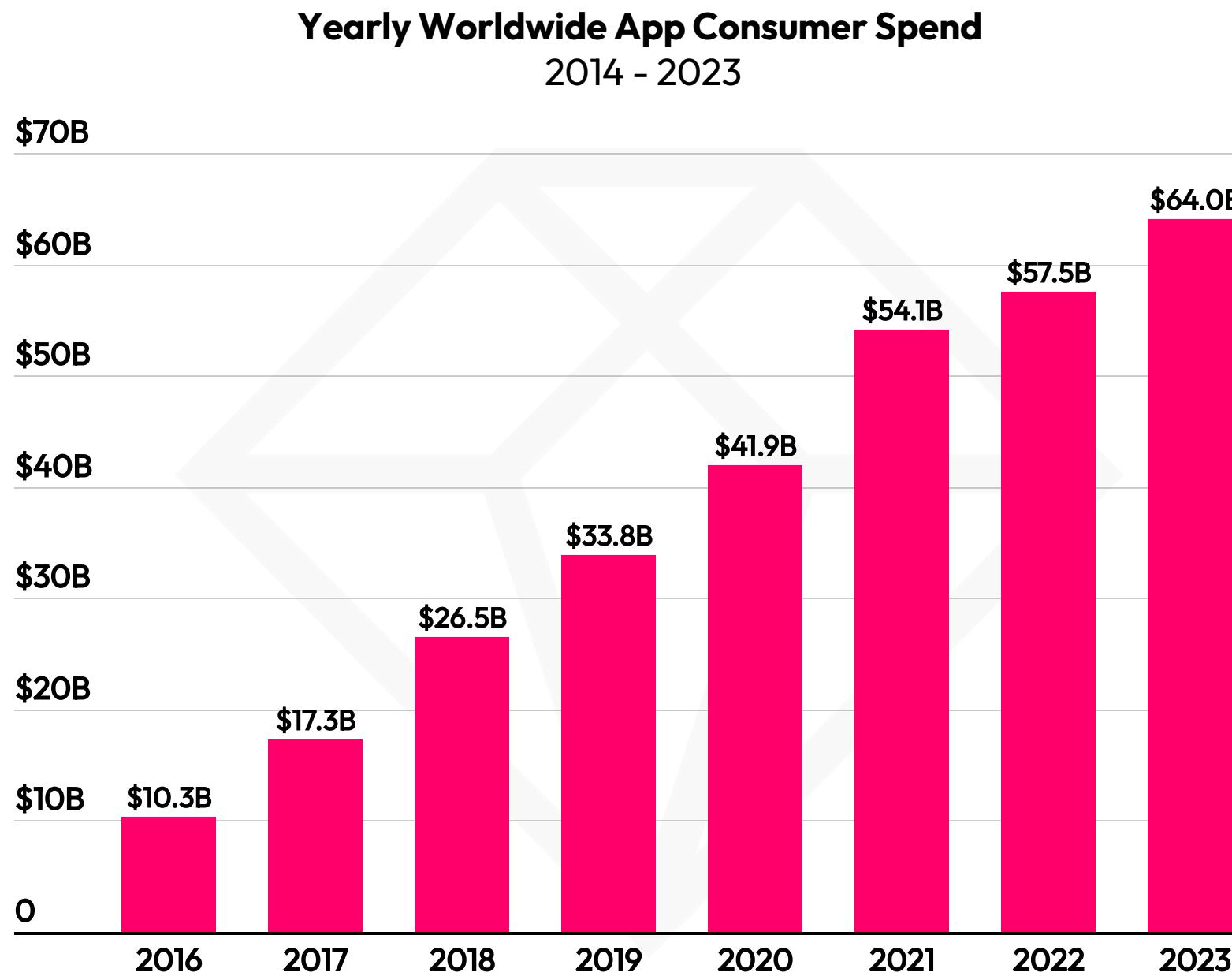


Source: data.ai Intelligence and OECD | Note: Consumer Spend across iOS, Google Play; Spend is gross — inclusive of any percent taken by the app stores. Disposable income growth and consumer spend growth are both indexed to Q1 2017. Household disposable income data from the Organisation for Economic Co-operation and Development (OECD) and available through Q2 2023.

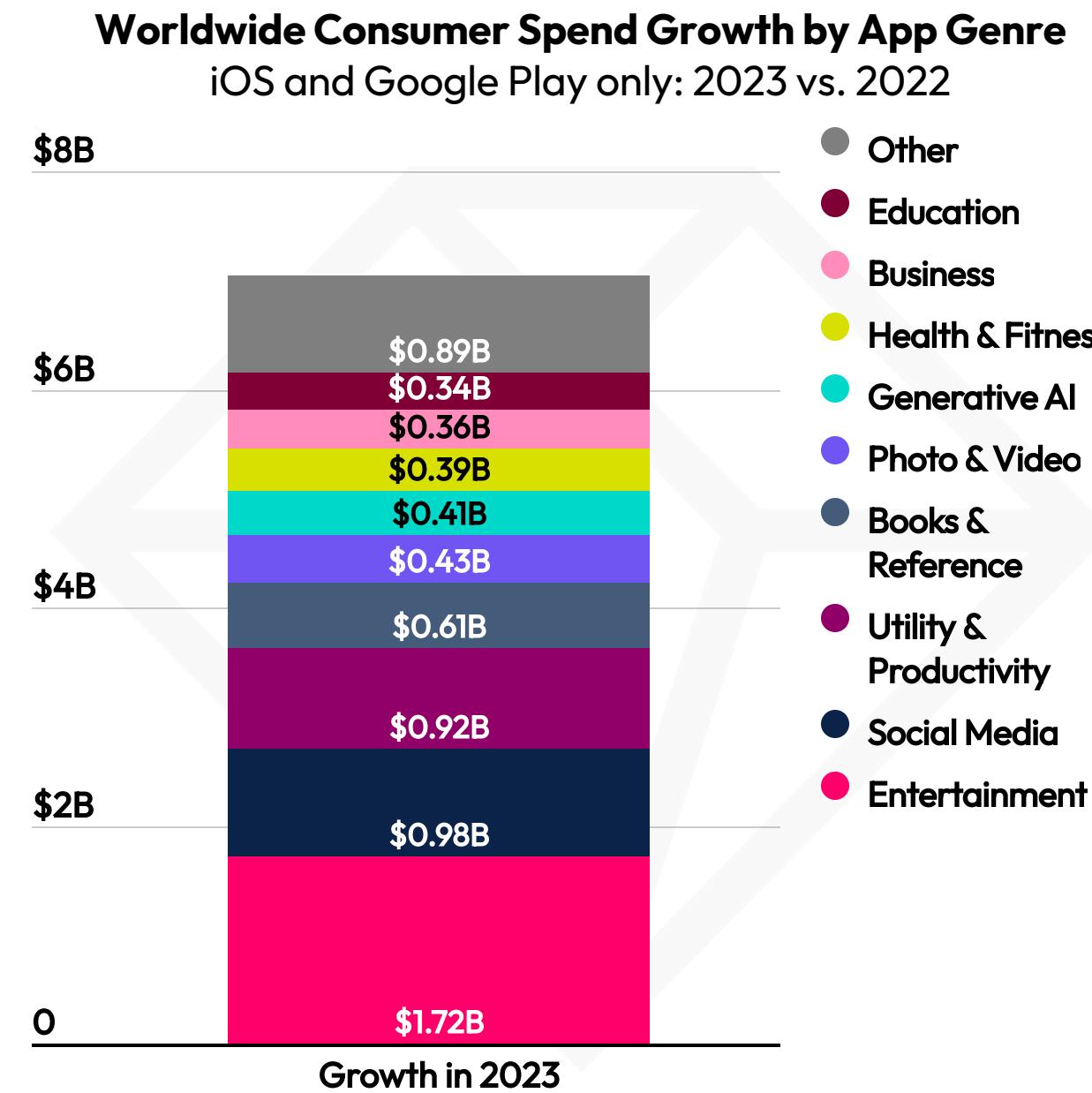


Will Consumers Soon Spend More in Apps Than Games? More Than \$60 Billion Spent in Apps Excluding Games in 2023

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.



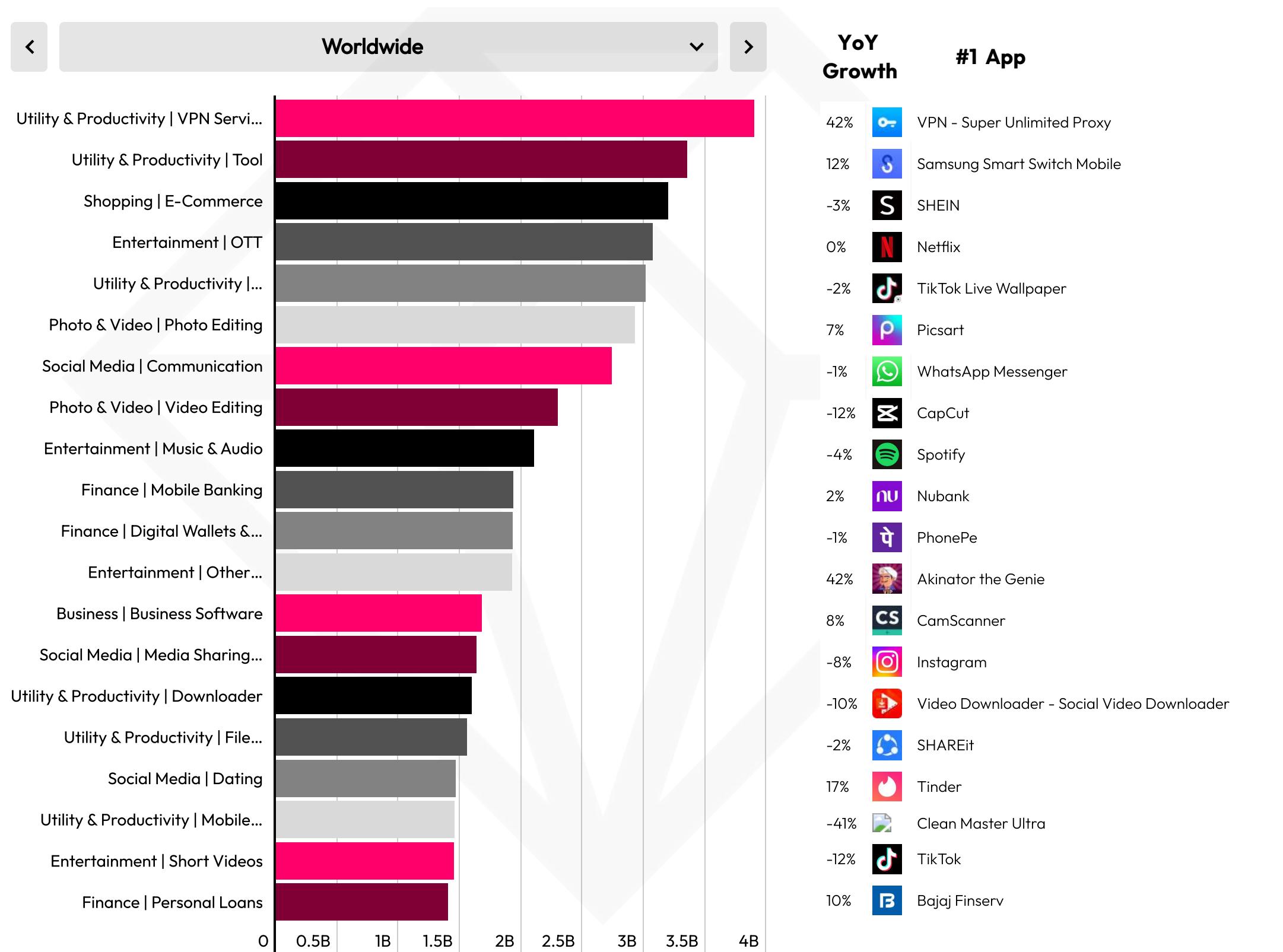
What's driving the growth? Entertainment, Social Media and Utility & Productivity led the way in 2023 as every single genre grew YoY.



Source: data.ai Intelligence | Note: Consumer Spend across iOS & Google Play and third-party Android stores in China; App genre breakdown includes iOS and Google Play only. Spend is gross — inclusive of any percent taken by the app stores. Based on App IQ Taxonomy as of Jan 4, 2024.



Top 20 Global App Subgenres by Downloads in 2023



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

MACRO MOBILE TRENDS

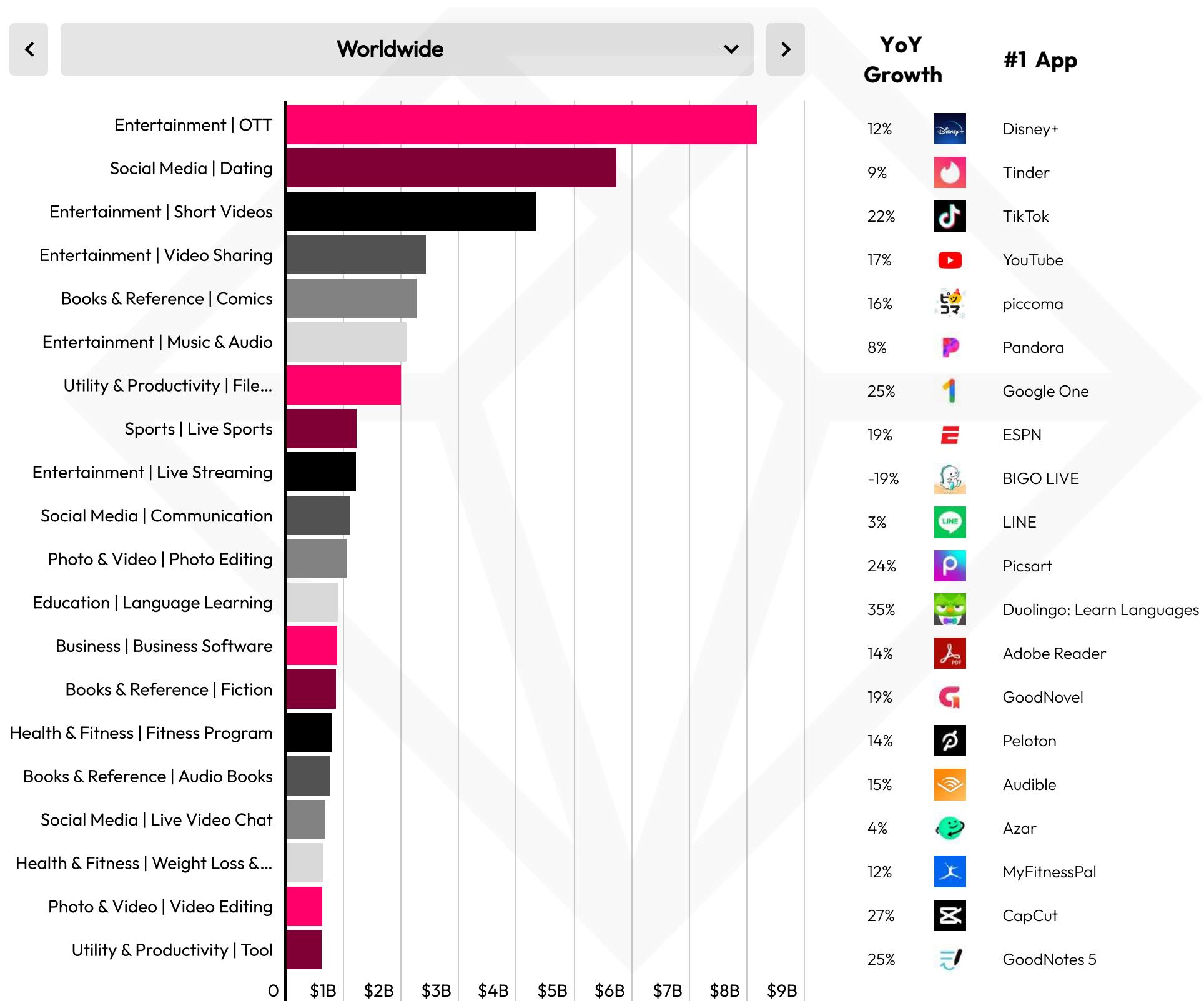
Utility & Productivity Drives Downloads with a Focus on Privacy

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.

Top 20 Global App Subgenres by Consumer Spend in 2023



MACRO MOBILE TRENDS

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 to 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.

data.ai customer?

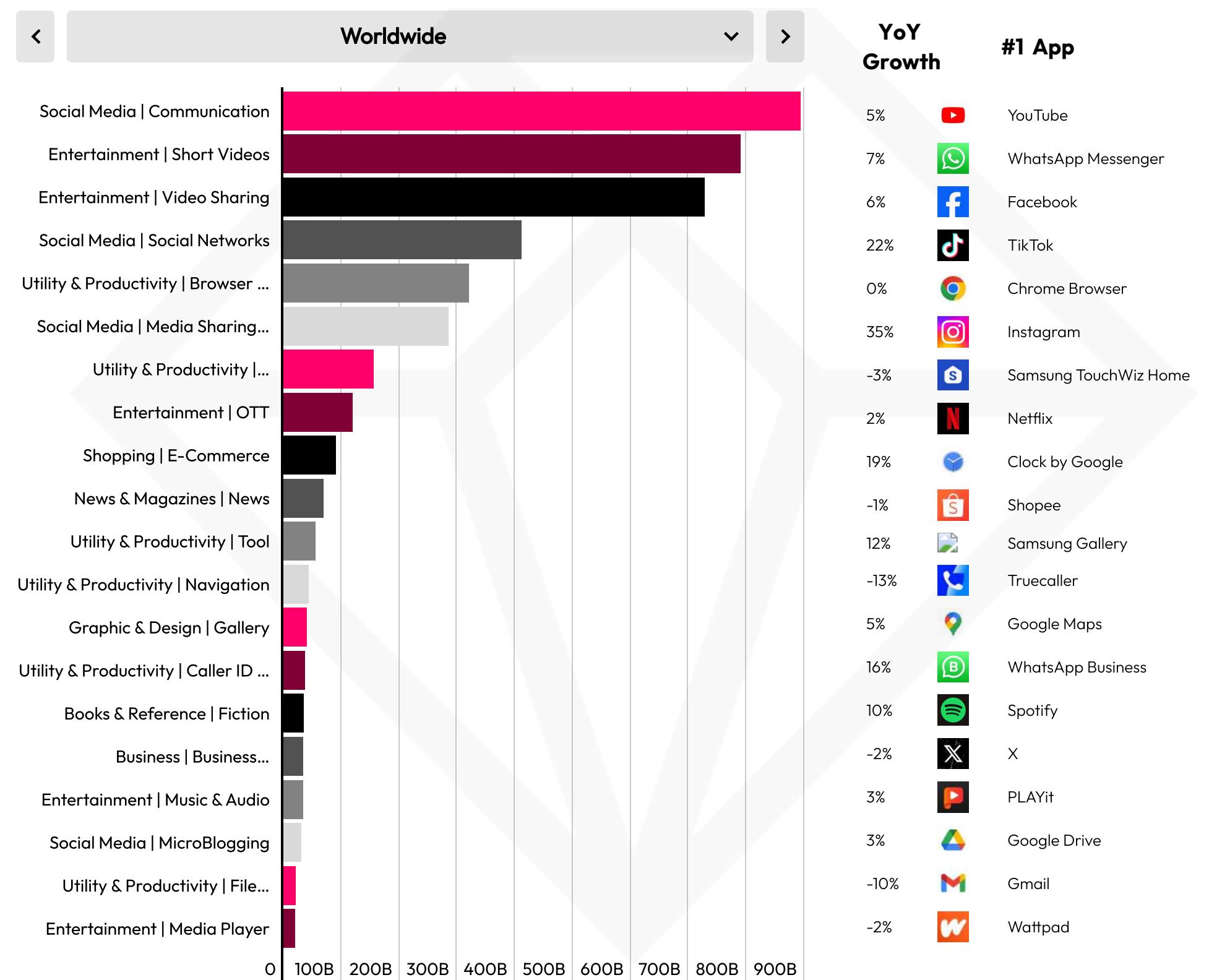
[See which markets are driving this growth](#) and provide opportunities for future expansion.





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

MACRO MOBILE TRENDS



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.

YoY Growth	#1 App
5%	YouTube
7%	WhatsApp Messenger
6%	Facebook
22%	TikTok
0%	Chrome Browser
35%	Instagram
-3%	Samsung TouchWiz Home
2%	Netflix
19%	Clock by Google
-1%	Shopee
12%	Samsung Gallery
-13%	Truecaller
5%	Google Maps
16%	WhatsApp Business
10%	Spotify
-2%	X
3%	PLAYit
3%	Google Drive
-10%	Gmail
-2%	Wattpad

data.ai customer?

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.



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

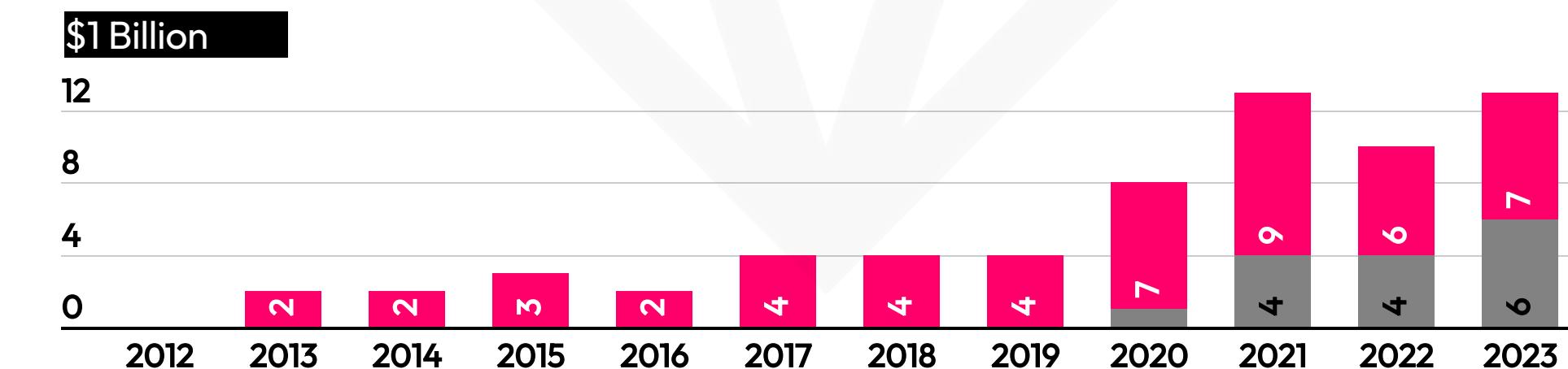
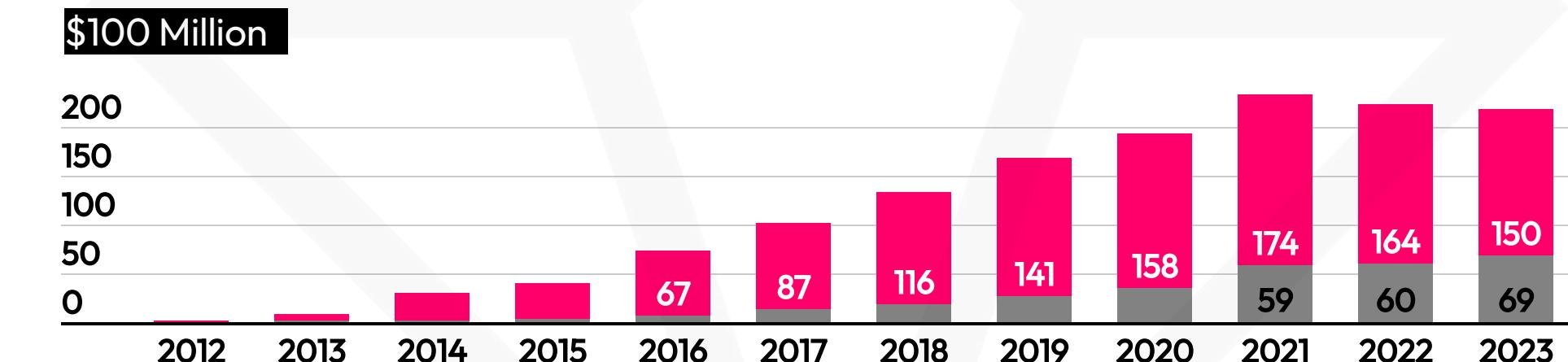
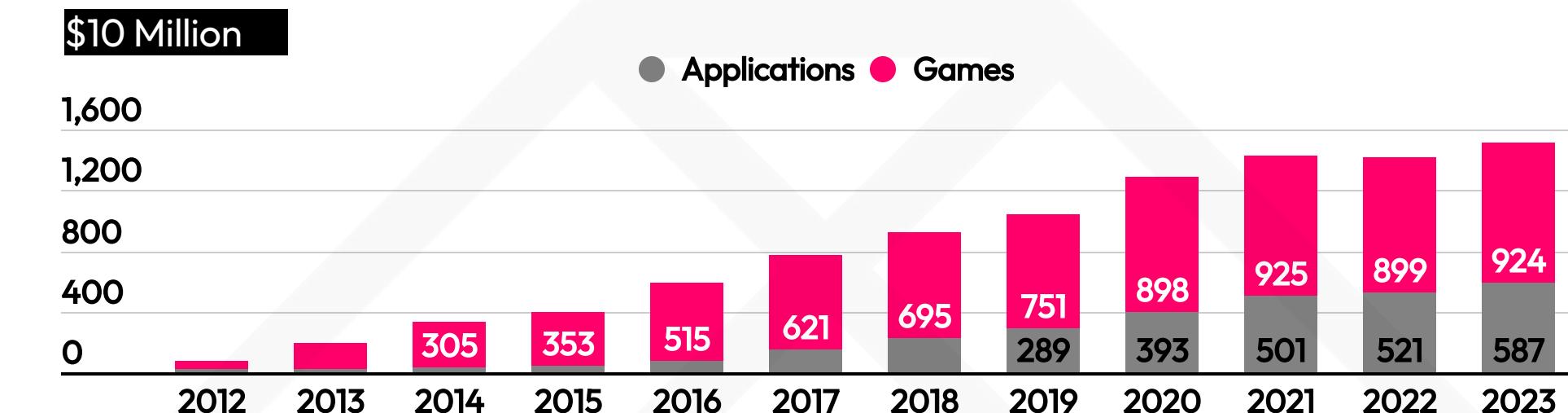
More than 1,500 apps and games generated over \$10 million dollars annually in 2023.

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



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



MACRO MOBILE TRENDS

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

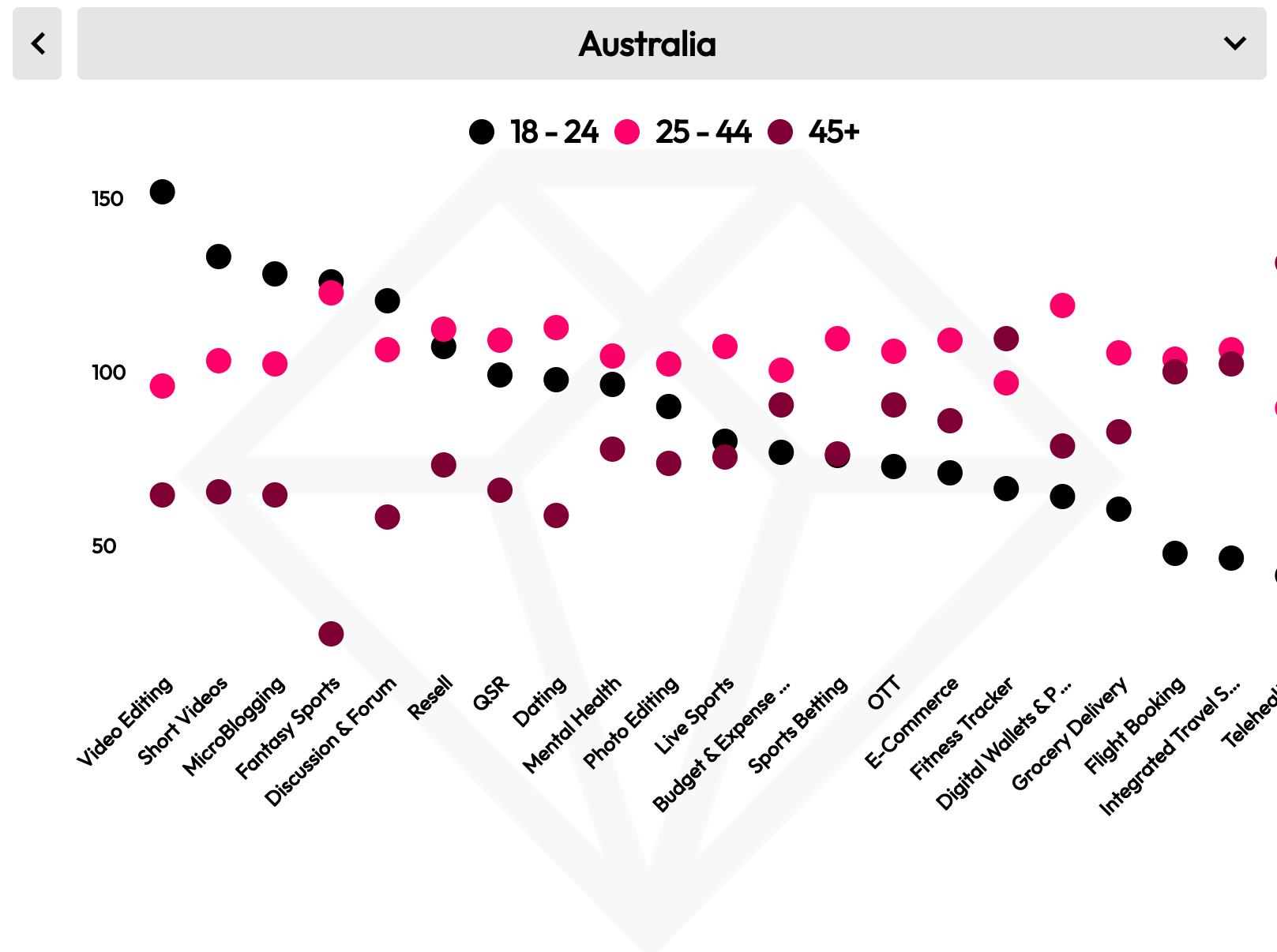


Source: data.ai Intelligence | Note: Consumer Spend across iOS, Google Play, iOS only for China;
Spend is gross — inclusive of any percent taken by the app stores



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



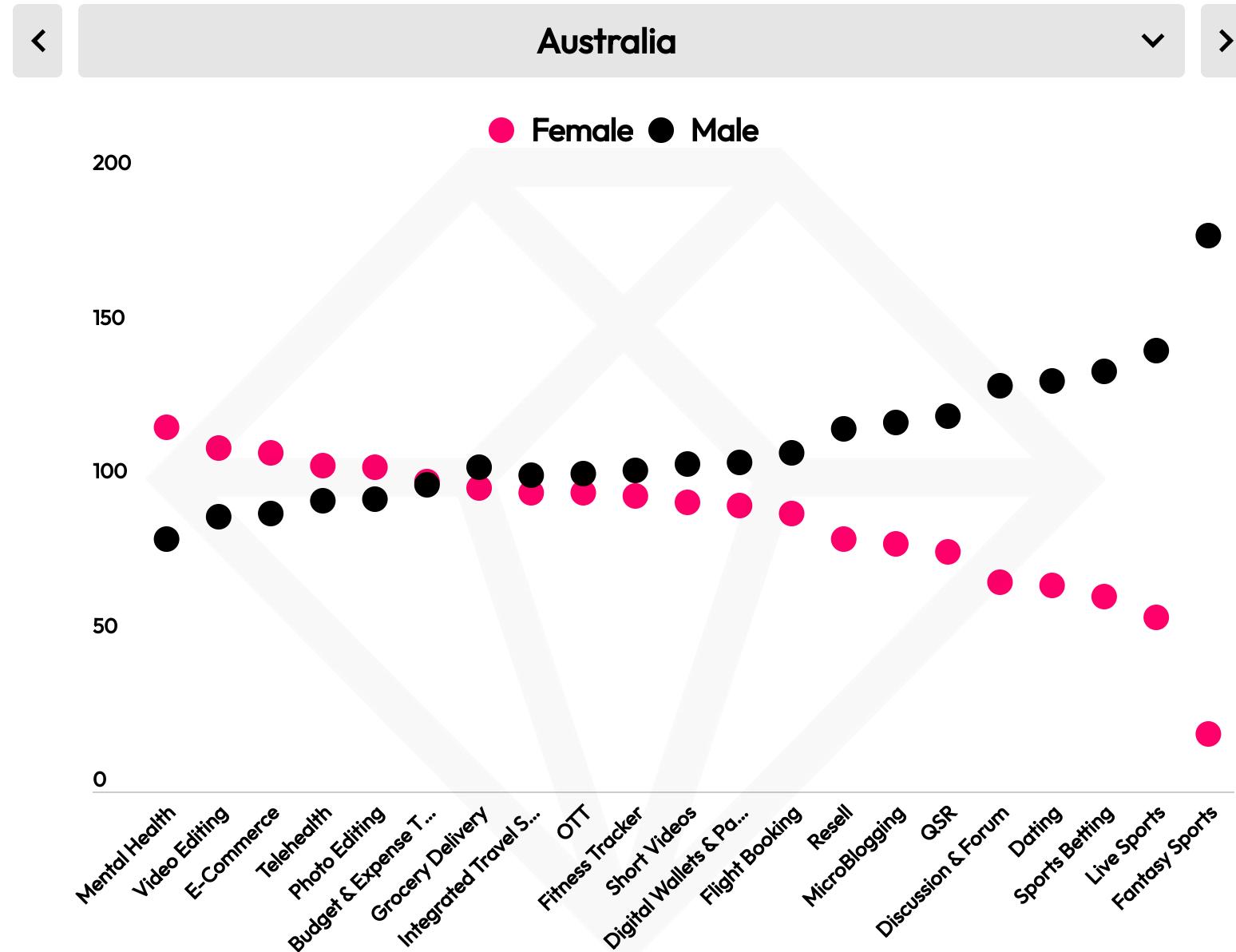


MACRO MOBILE TRENDS

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



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. Gender represented as Male and Female only and is not representative of all gender identities



The Most Searched iOS App Store Keywords in 2023

Entertainment | 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	ねつとふりつくす	hbo	tv	티빙	viu	exxen	disney+	hulu
4	globo	tv	腾讯	canal	ard mediathek	mx player	videos	てい一ぱー無料	disney	انسي	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

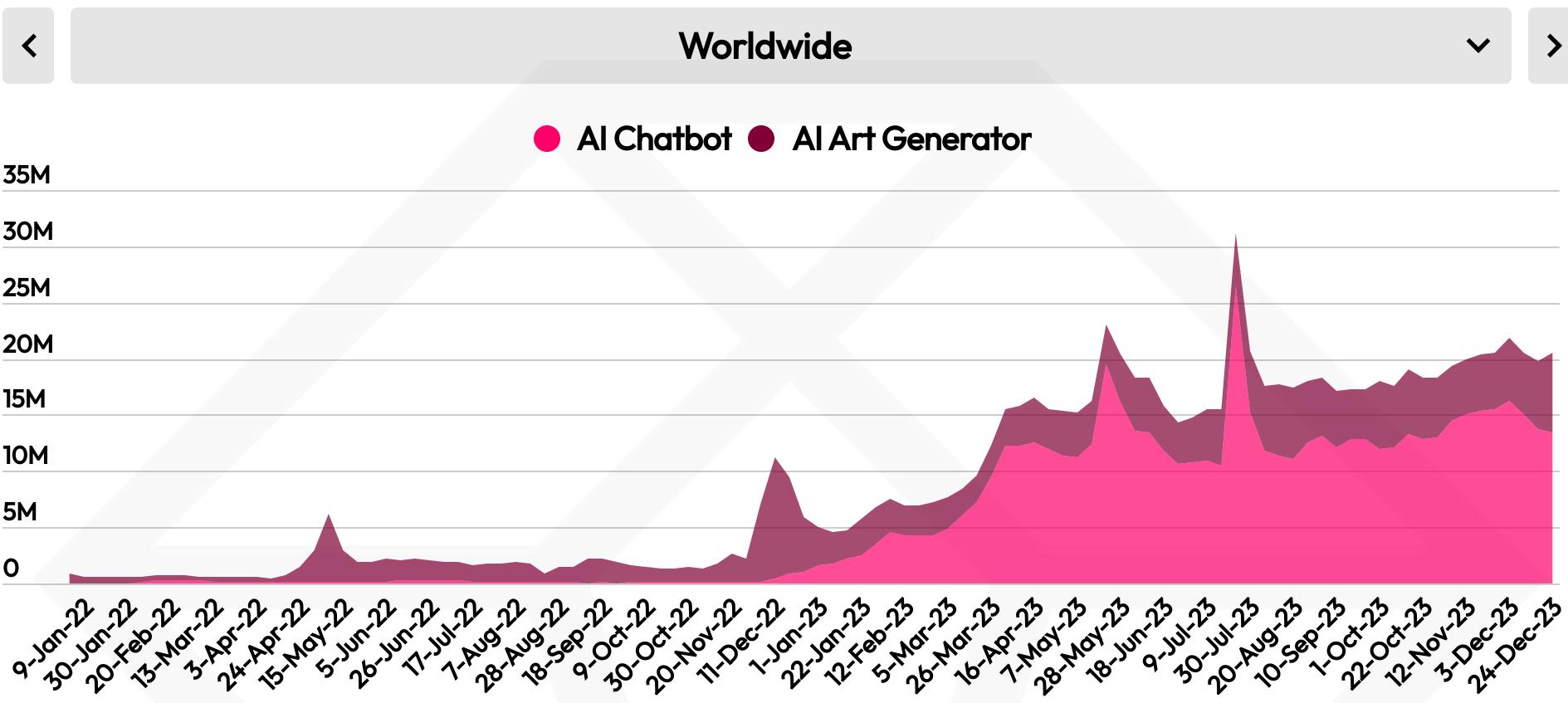
CEO & Founder



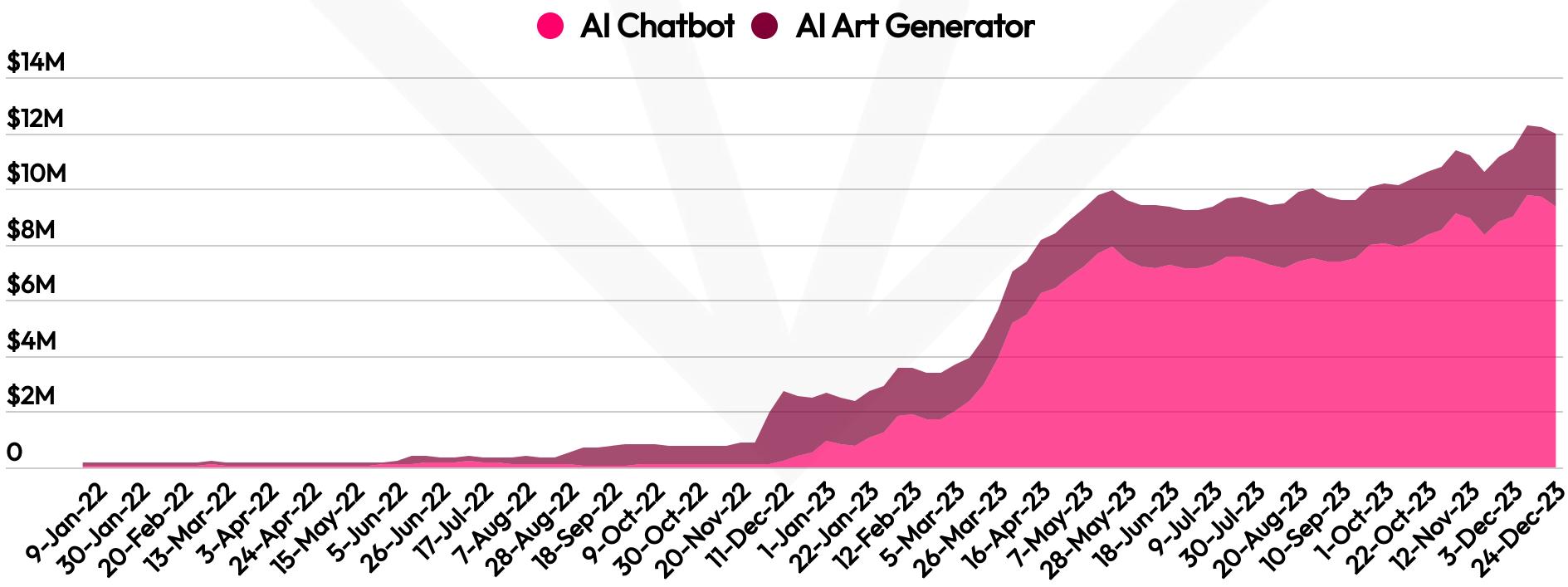
MWM



Generative AI App Weekly Downloads by Subgenre



Generative AI App Weekly Consumer Spend by Subgenre



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



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

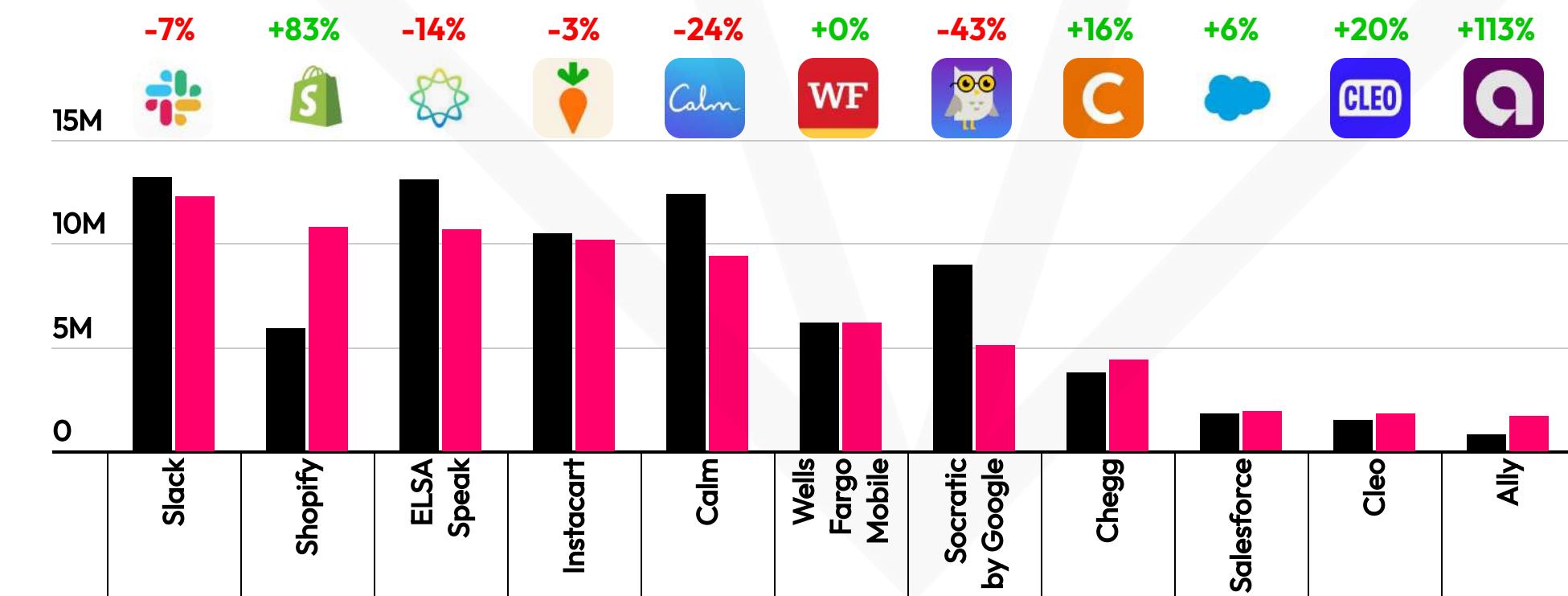
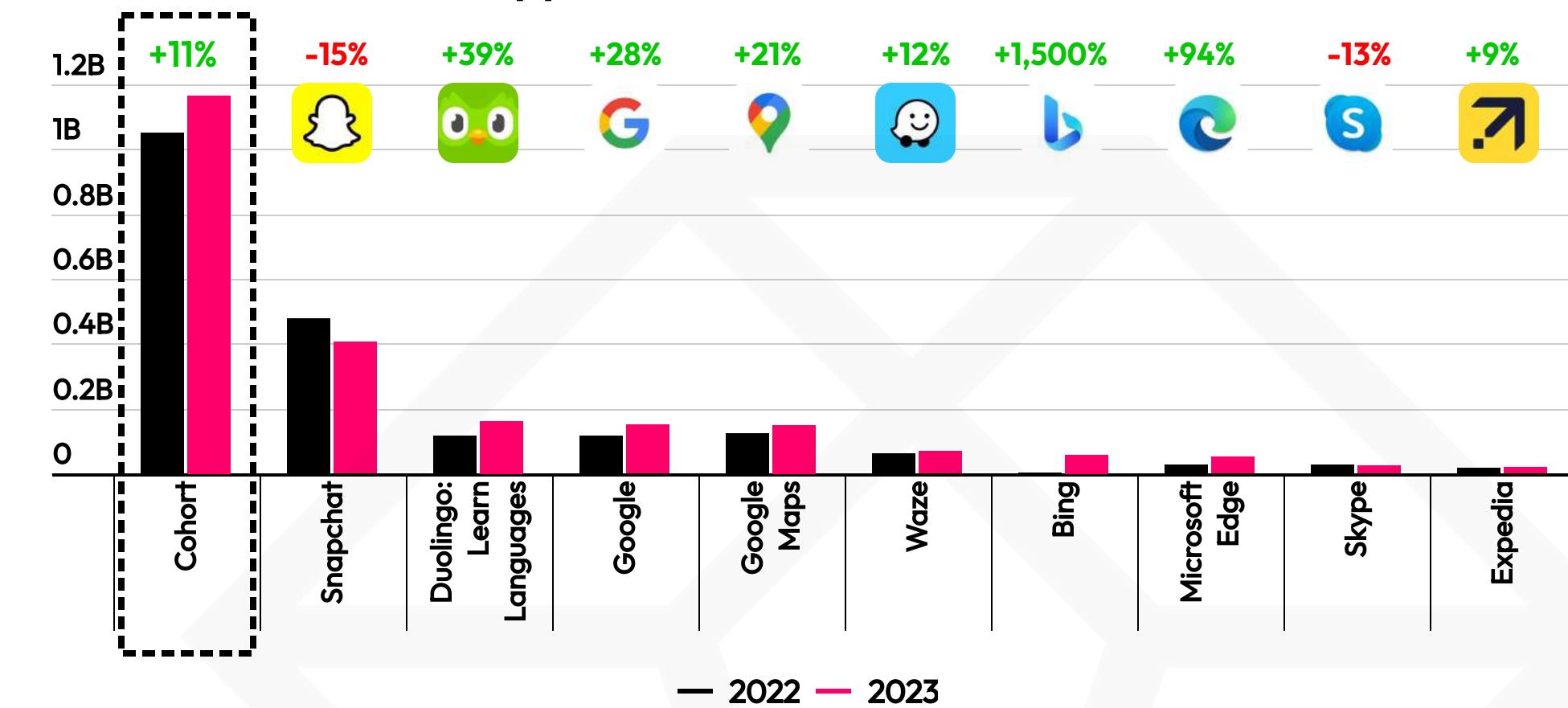
A cohort of 20 top apps that recently added AI features outperformed the market in 2023 with 11% YoY growth.

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



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

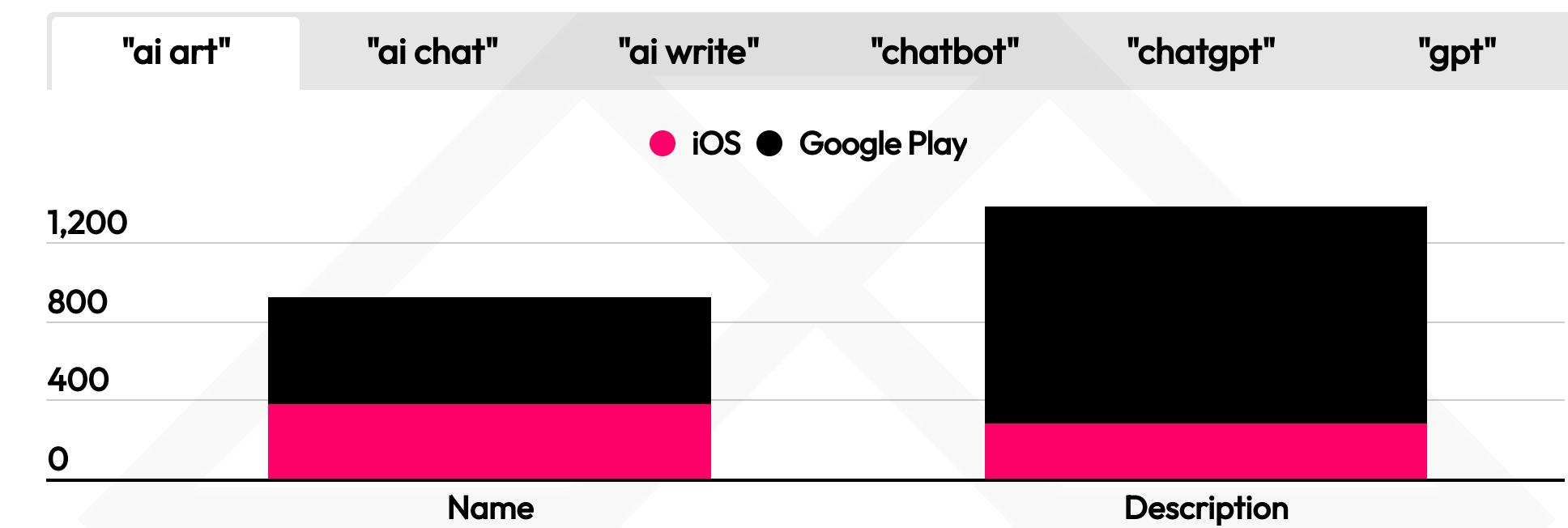
Thousands of apps flocked to the iOS App Store and Google Play store with ai-related solutions. More than 4,000 apps added "chatbot" to their app descriptions, and more than 3,500 added "gpt".

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.

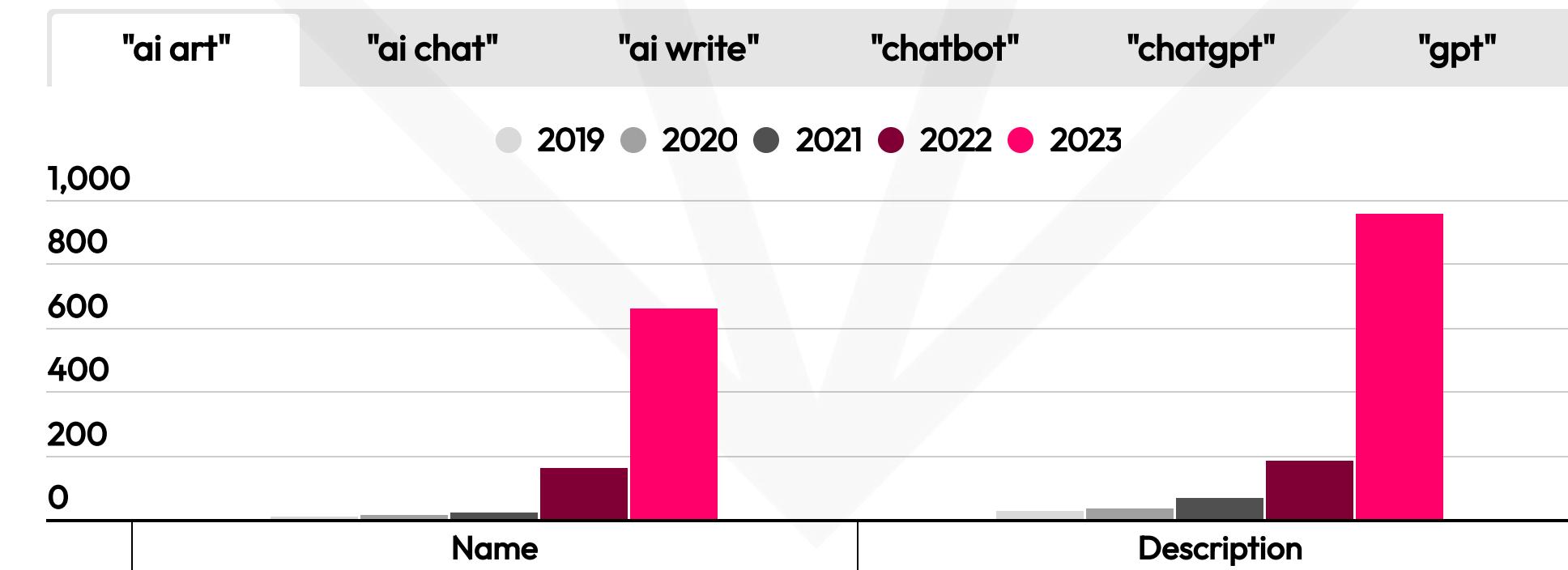
[Want to take the next step?](#)

See which apps are capitalizing on boosting organic discovery amidst the ai hype with [ASO Keywords](#)

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



Release Years for Apps with AI-Related Terms



Source: data.ai Intelligence | Note: Based on the latest app names and descriptions. Includes apps released on iOS and Google Play that have ranked in the top category rankings.

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





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

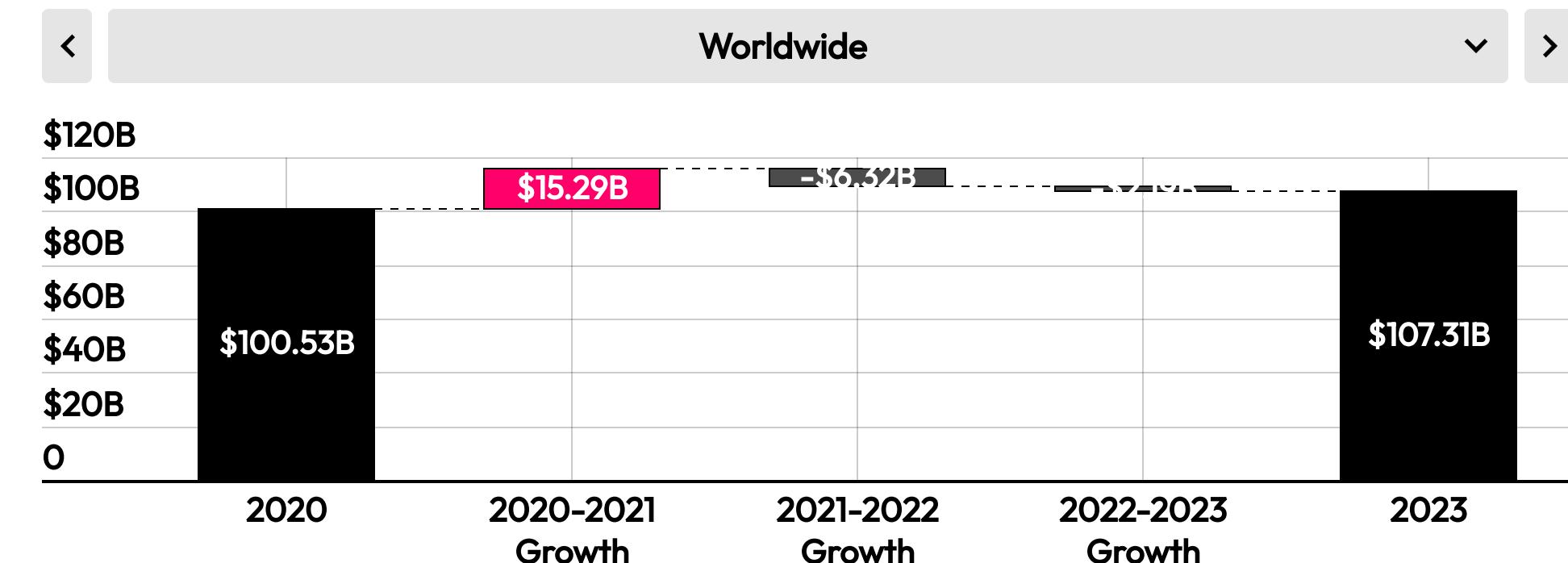
In 2023, well known IP games such as [Monopoly GO](#) and [EA SPORTS FC Mobile Soccer](#) saw breakout success as mobile games are now capable of offering console-quality graphics and gameplay experiences.

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

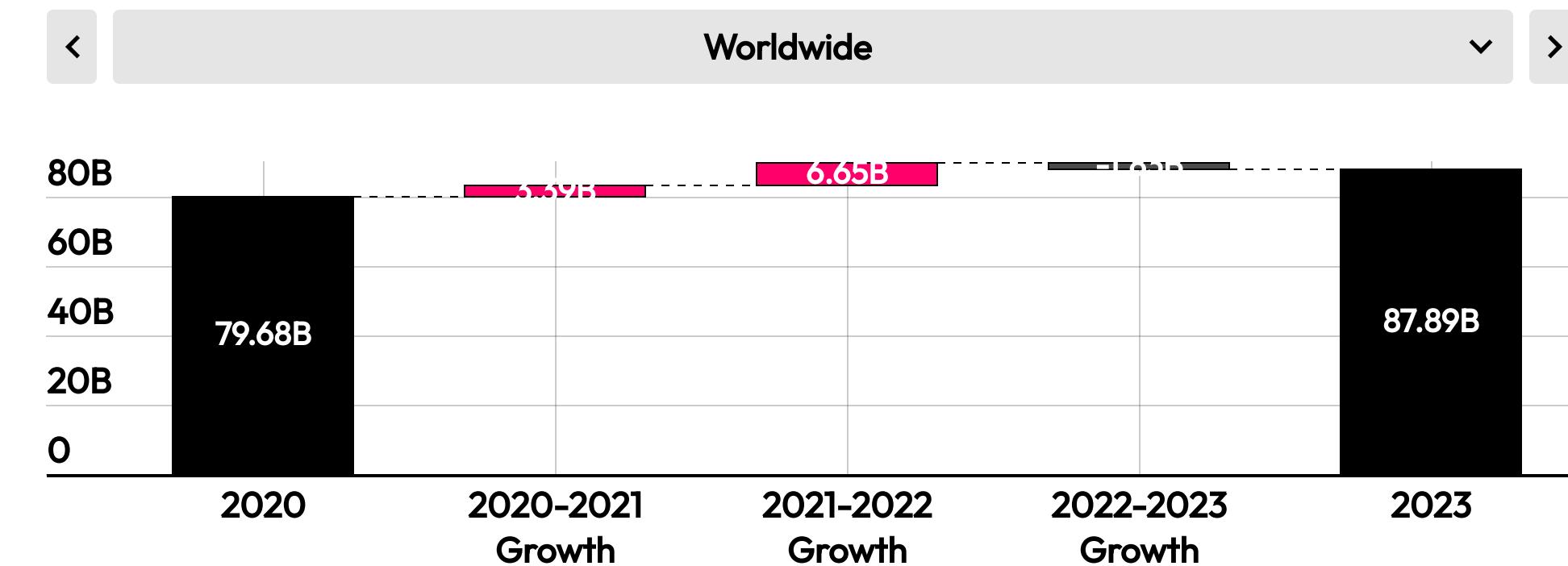
Puzzle and Hypercasual games like [Block Blast Adventure Master](#) and [Attack Hole](#) were key download drivers, but 2023 saw some surprise hits such as Avatar Life Simulation game [Gacha Life 2](#), and Party Royale game [Eggy Party](#), making major gains in downloads and usage.

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



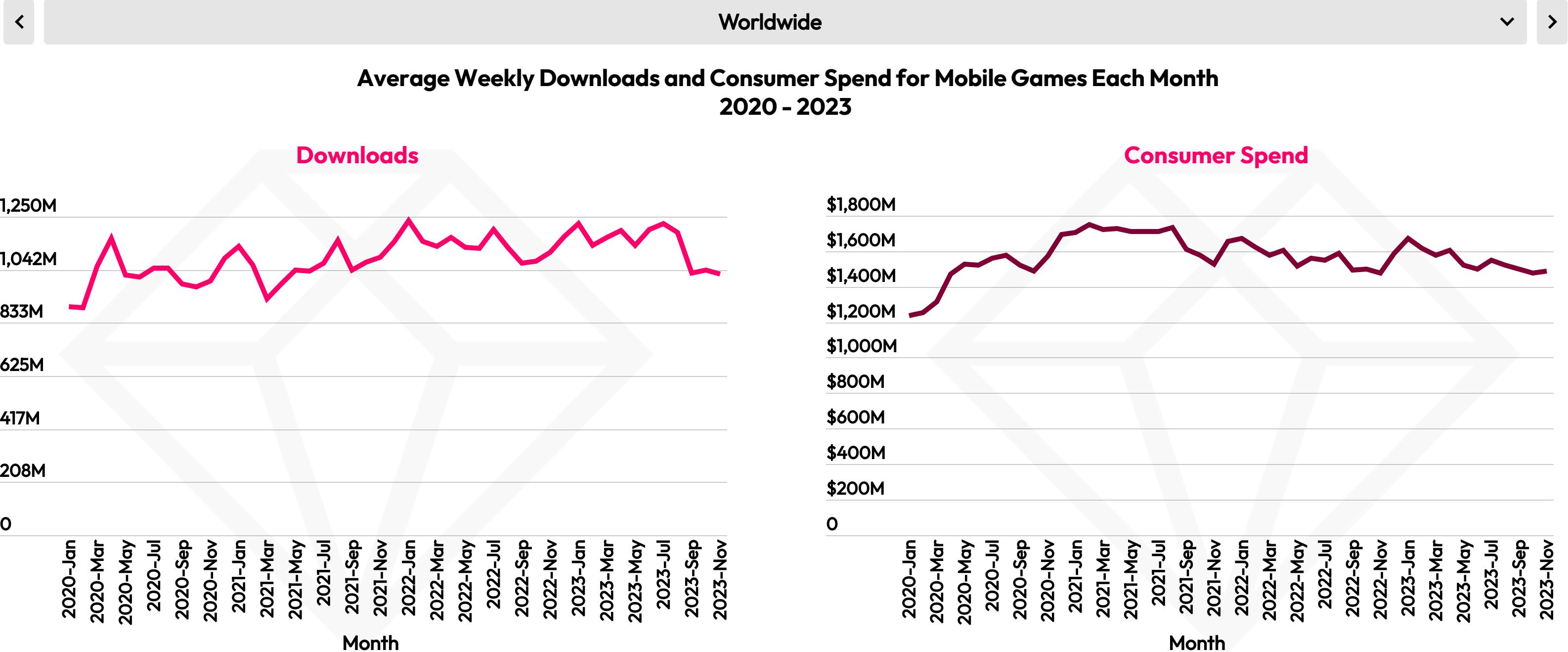
Mobile Game Download Growth



Source: data.ai Intelligence | Note: Downloads across iOS, Google Play and third-party Android in China combined; Time spent is Android phones only; Spend is gross — inclusive of any percent taken by the app stores



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

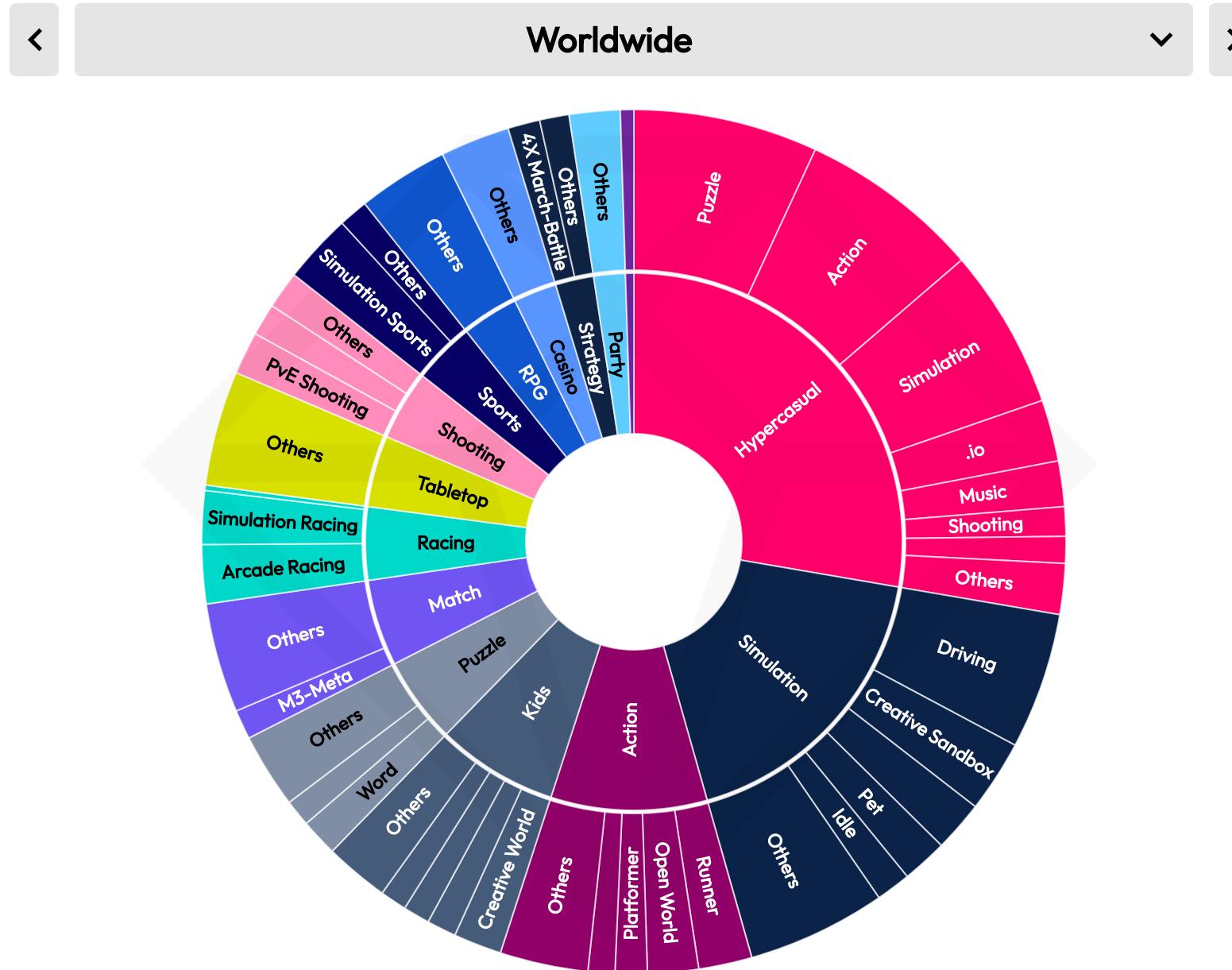


Source: data.ai Intelligence | Note: Downloads and consumer spend are across iOS and Google Play. iOS only for China.

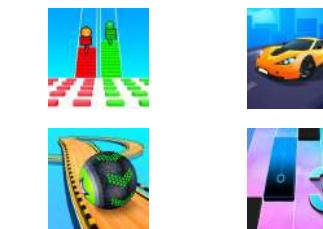


Who are the Leaders by Downloads?

2023 | Worldwide Top Mobile Game Genres by Downloads | Powered by data.ai's Game IQ Taxonomy



#1 - Hypercasual



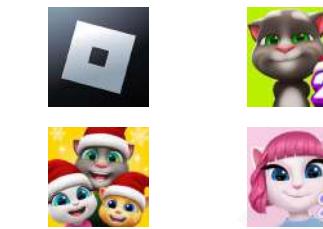
16.4 B in Downloads
YoY Downloads -7.5%
YoY IAP Spend +52.9%
28% of All Downloads
0.5% of All IAP Spend

#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

#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

#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

#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

#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

#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

#8 - Tabletop

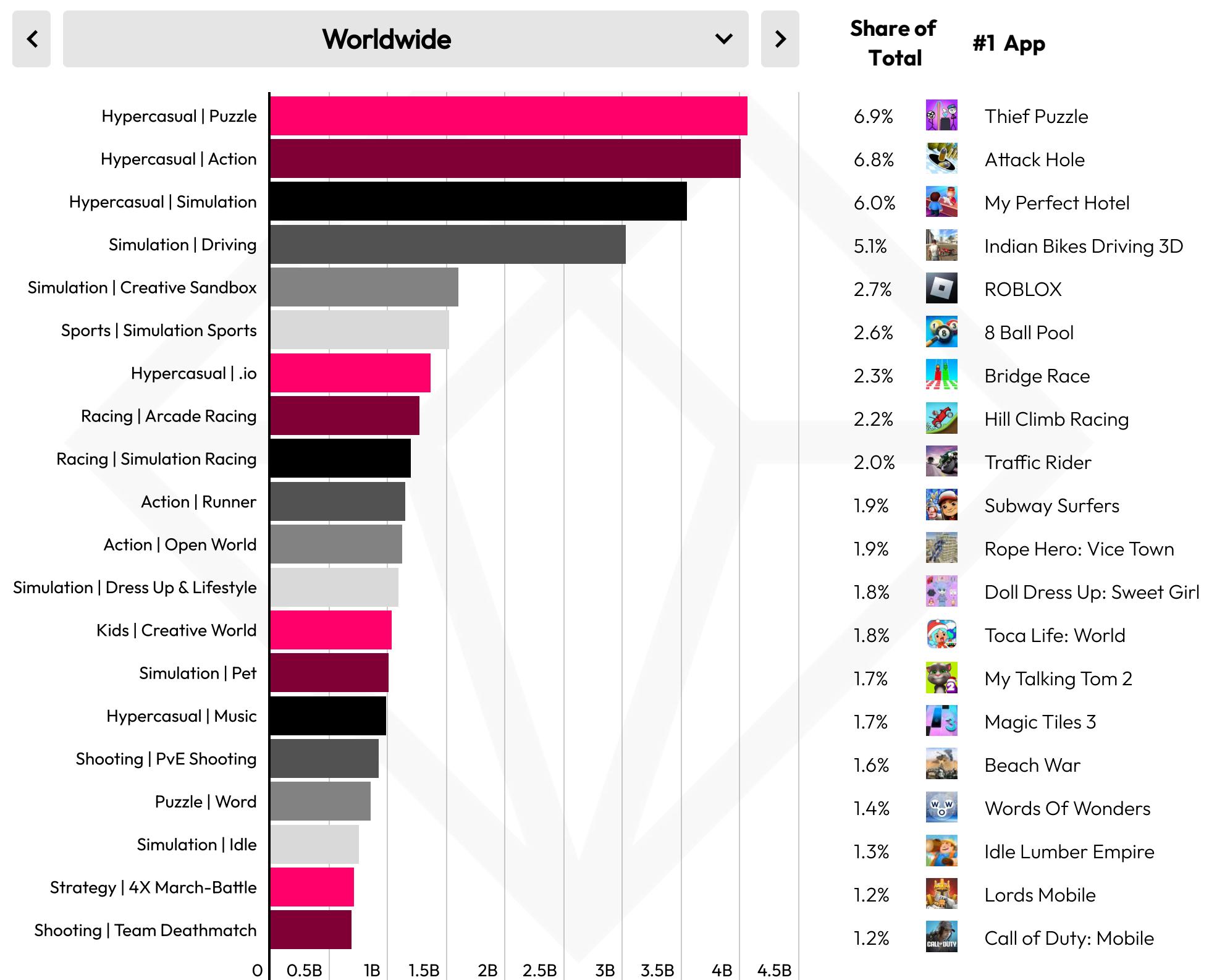


2.5 B in Downloads
YoY Downloads +5.7%
YoY IAP Spend +4.8%
4% of All Downloads
2.0% of All IAP Spend



Top 20 Global Game Subgenres by Downloads in 2023

GAMING



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 Game IQ primary categorization as of Jan 4, 2024

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.

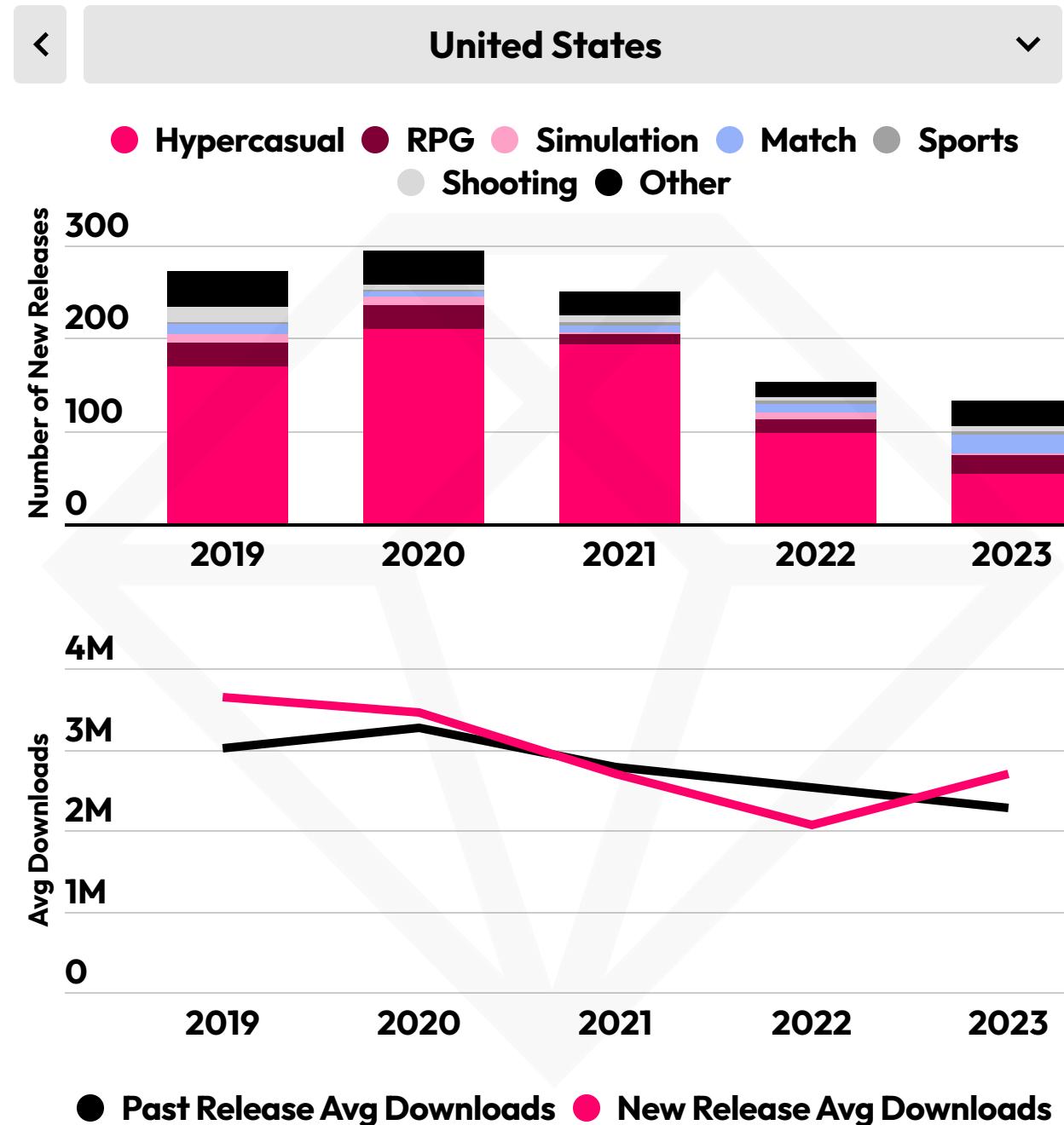
Innovative Genres such as Avatar Life ([Gacha Life 2](#)) and Party Royale ([Eggy Party](#)) are poised to disrupt incumbent market dominance.

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



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)

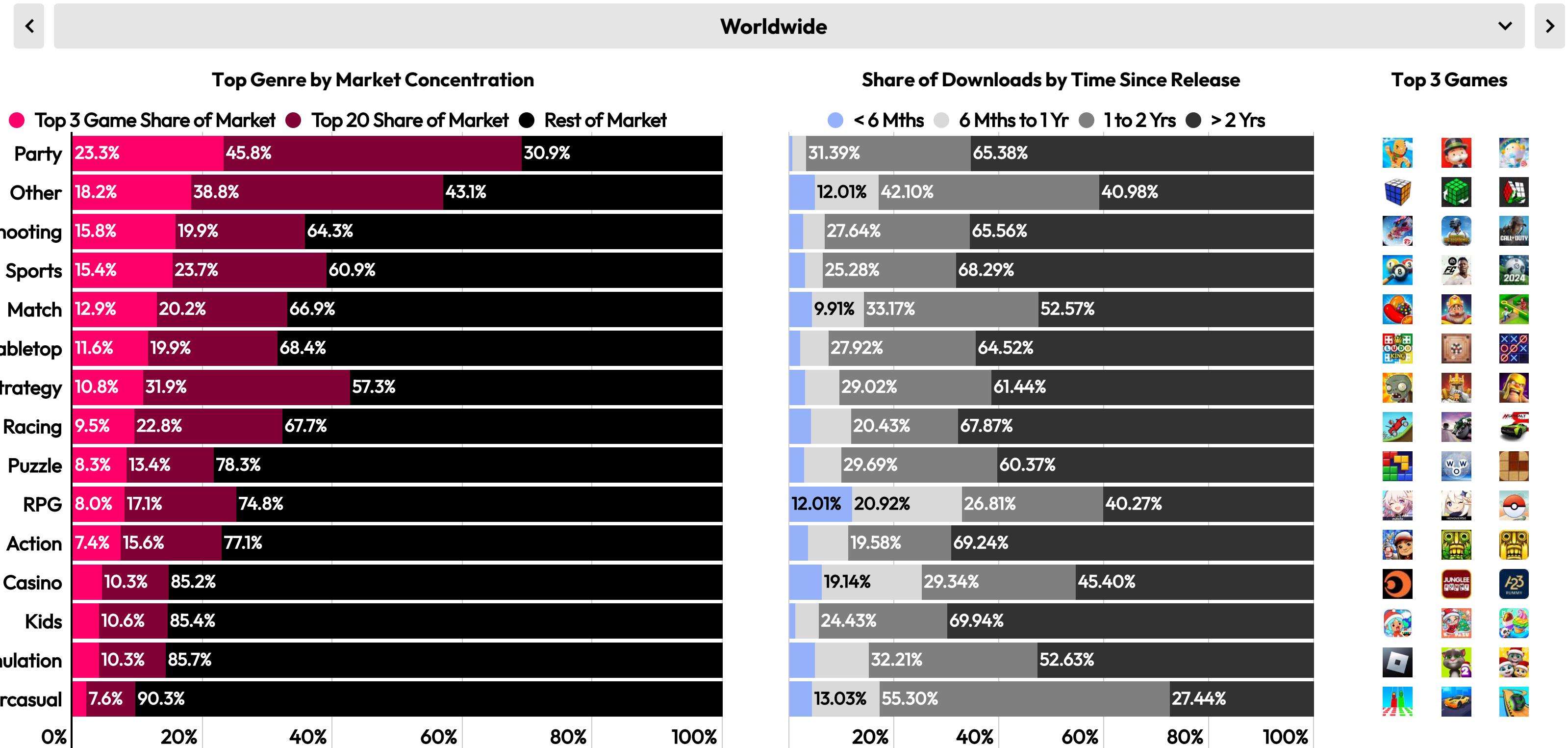
Top Past Releases by Downloads

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

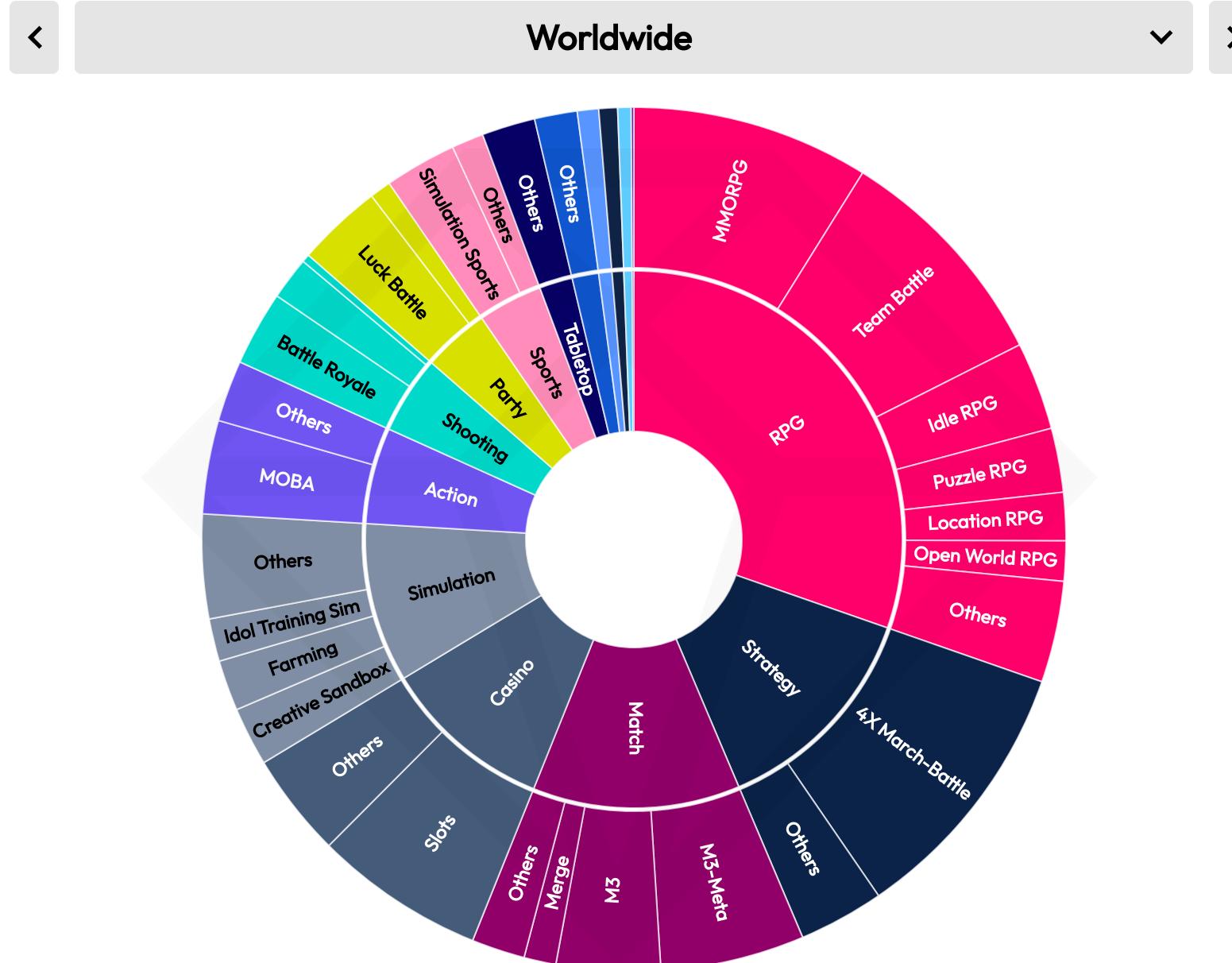


Source: data.ai | Intelligence | Note: Downloads across iOS, Google Play. China is iOS only. Genre breakdown based on data.ai Game | Q Taxonomy as of January 4th, 2024

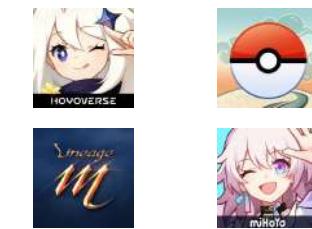


Who are the Leaders by Consumer Spend?

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



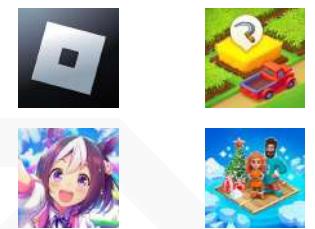
\$10.2 B in (IAP) Spend
YoY IAP Spend +16.3%
YoY Downloads +6.7%
13% of All IAP Spend
5% of All Downloads

#4 - Casino



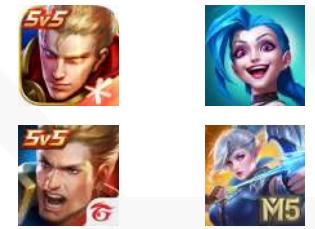
\$8.3 B in (IAP) Spend
YoY IAP Spend -0.1%
YoY Downloads -1.5%
10% of All IAP Spend
3% of All Downloads

#5 - Simulation



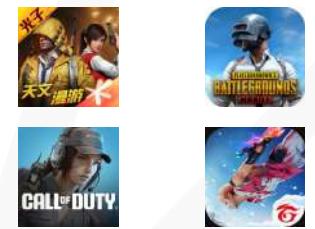
\$7.7 B in (IAP) Spend
YoY IAP Spend -5.3%
YoY Downloads +0.7%
10% of All IAP Spend
18% of All Downloads

#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

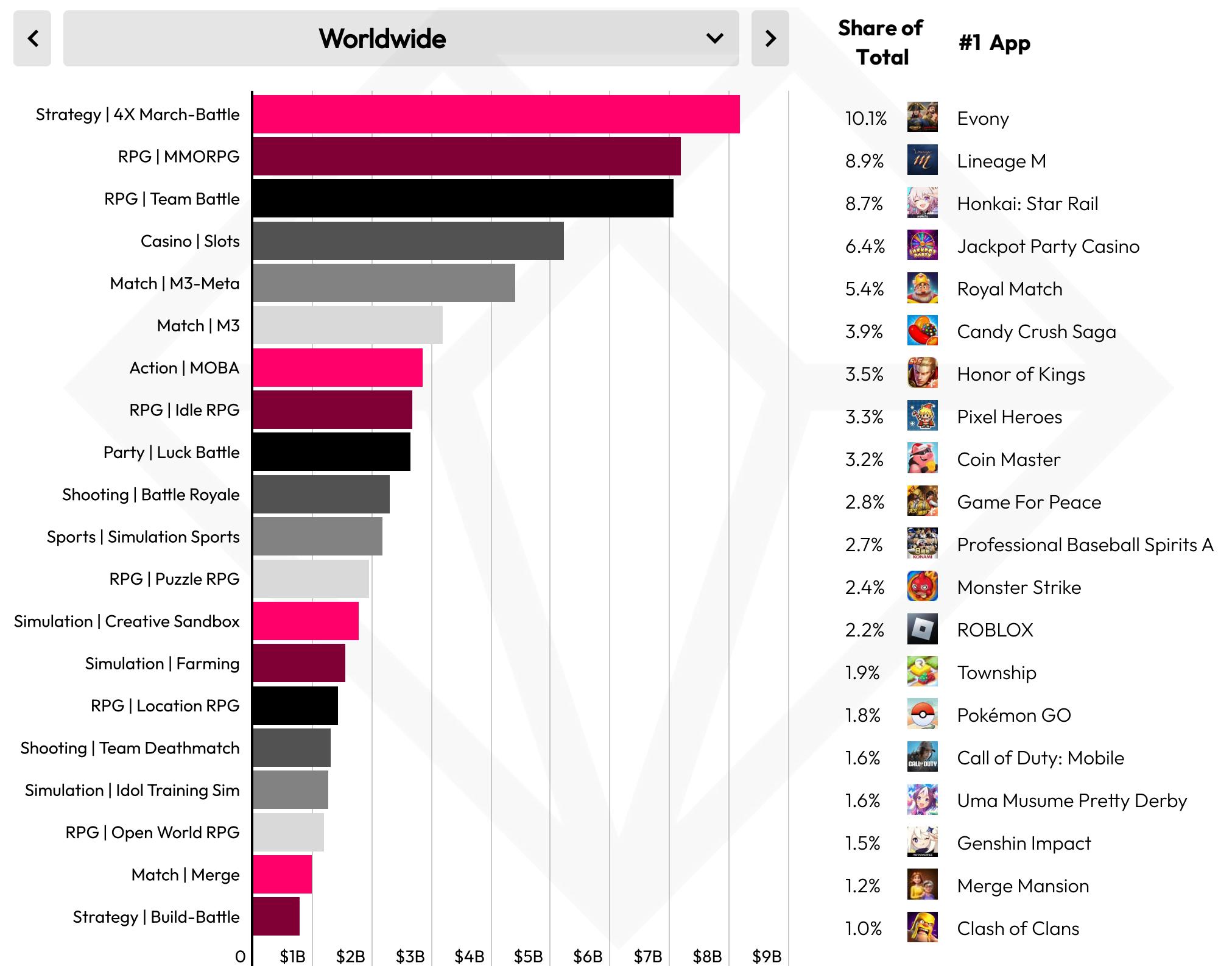
#8 - Party



\$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

GAMING



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.

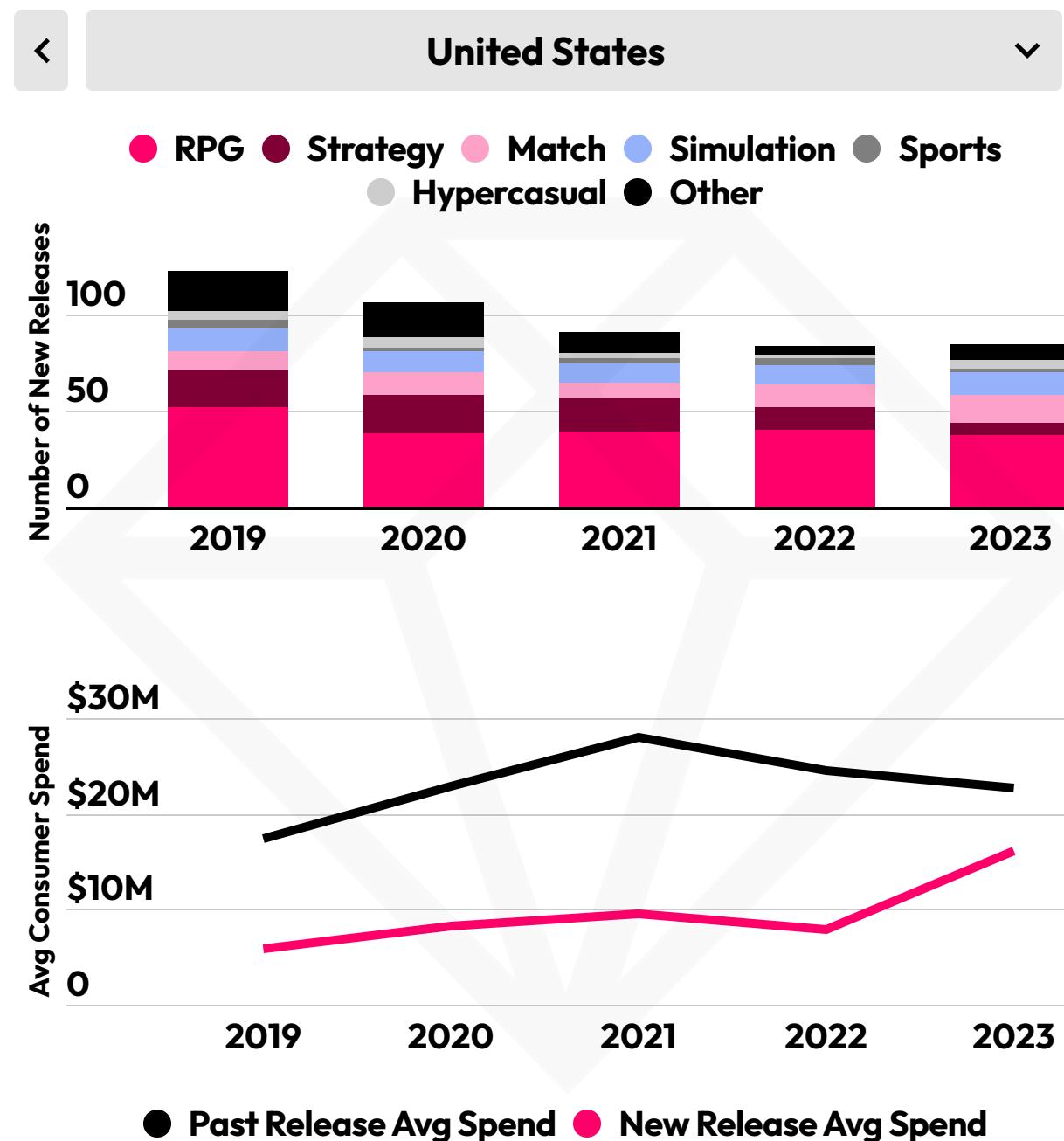
Cross-play features are becoming increasingly prominent in the top games — the ability to access the same game progress across devices (whether on mobile or console, for instance) appears to be on the rise, as is playing against players using different platform versions of the same game.

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



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)

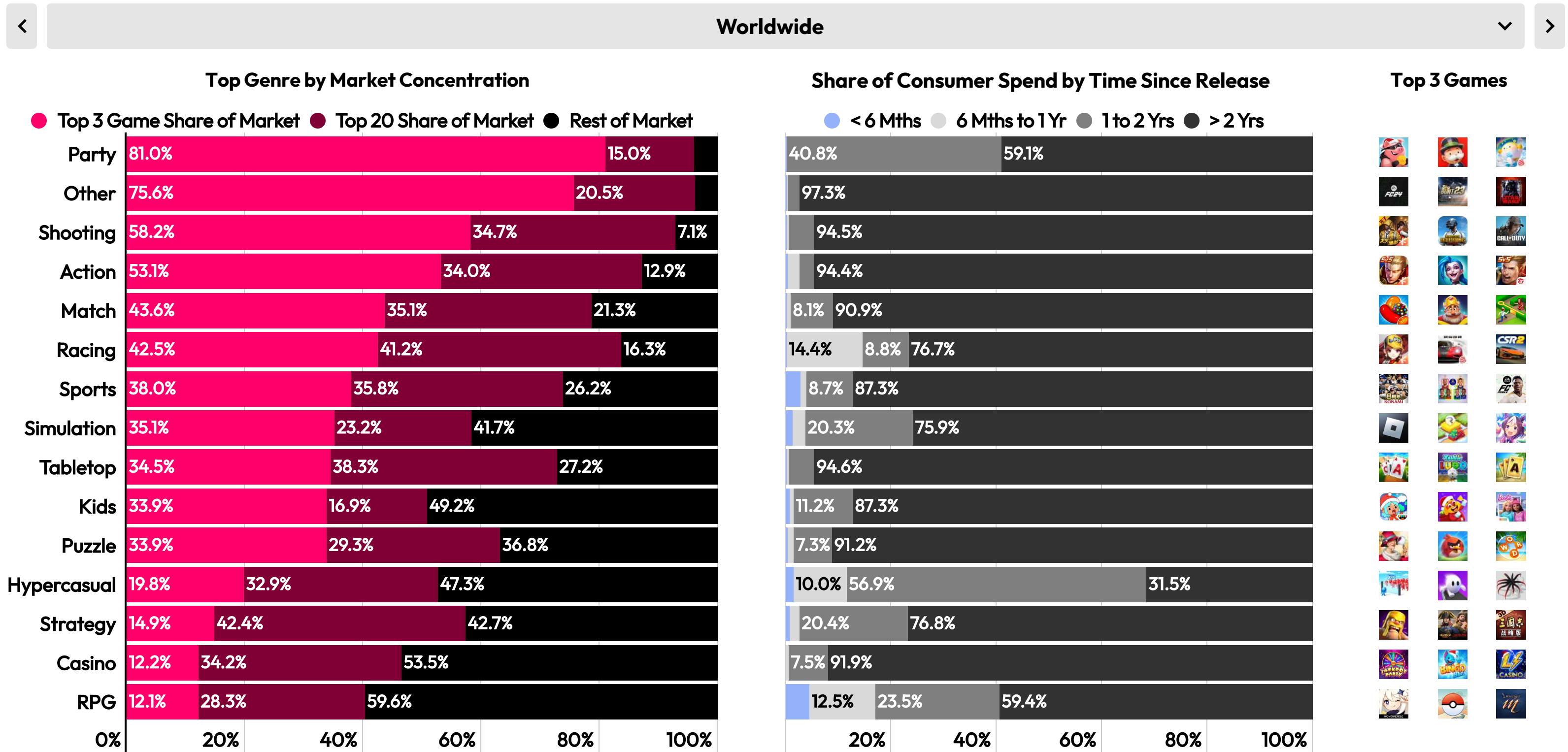
Top Past Releases by Consumer Spend

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)



Monopoly GO a Standout Launch for the Party Genre

2023 | Top Genre Per Market Concentration by Consumer Spend

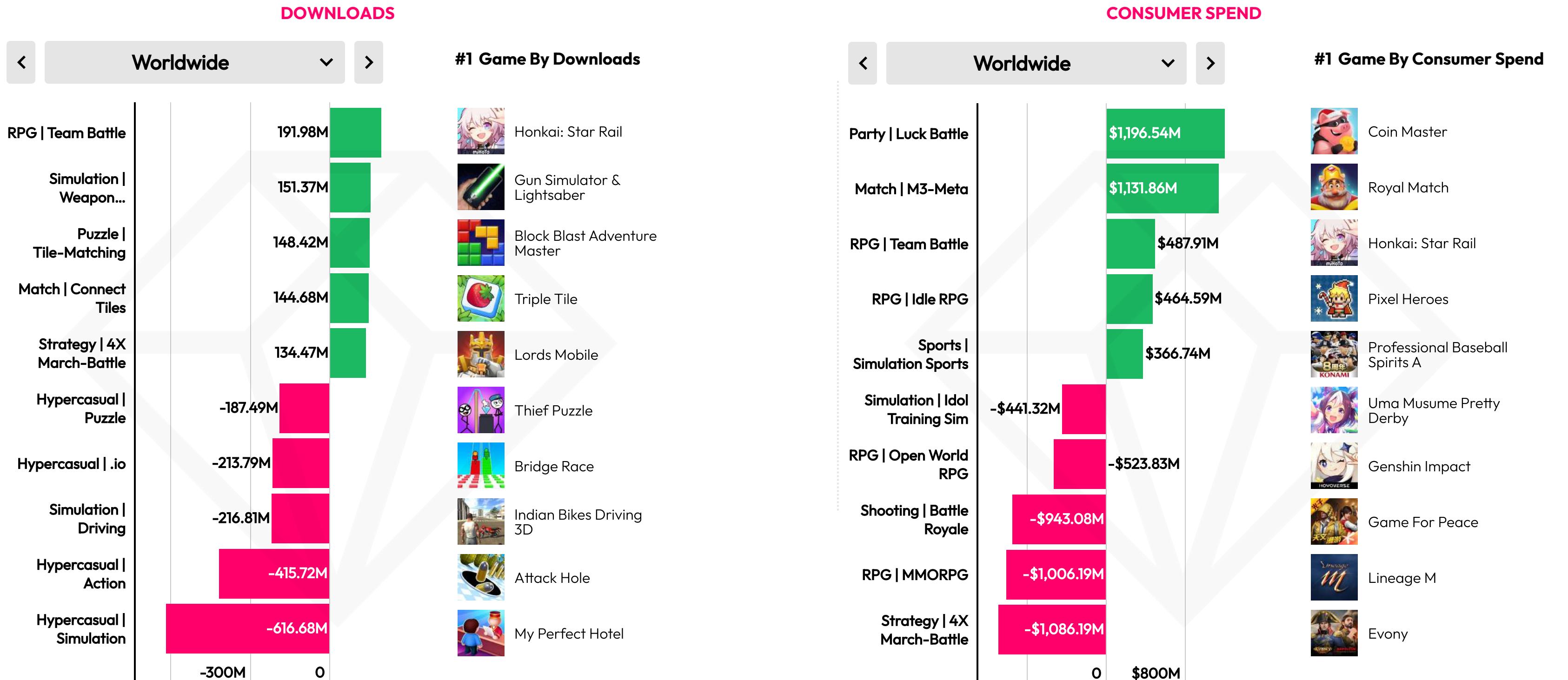




MACRO MOBILE TRENDS

Which Game Subgenres Defy Global Trends?

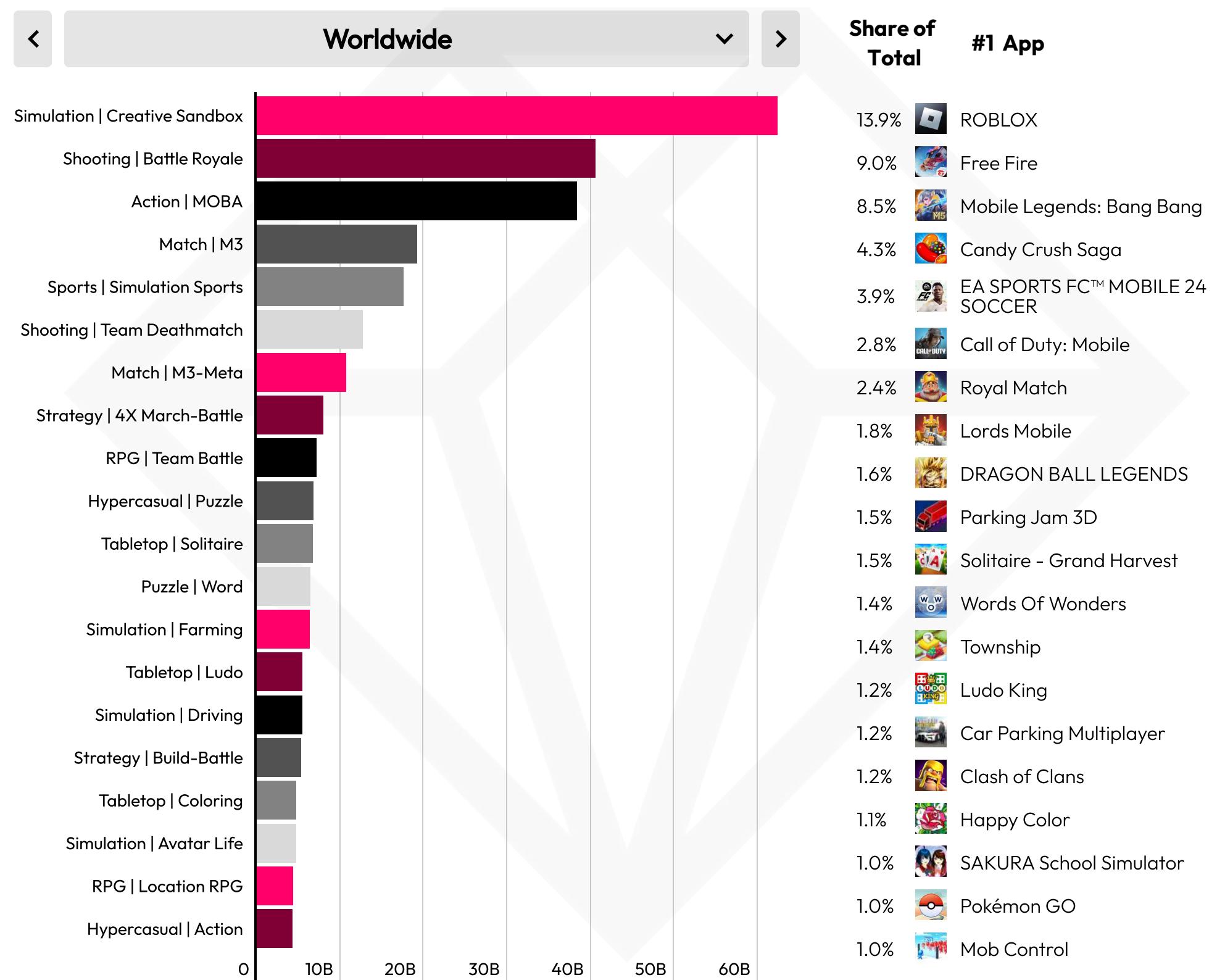
Top Breakout Gaming Subgenres: 2023 vs 2022



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



Top 20 Global Game Subgenres by Time Spent in 2023



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.

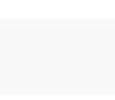
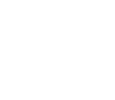
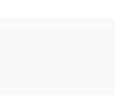
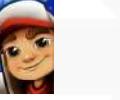
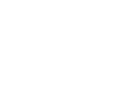
Mobile has enabled core games to become more ‘casual’ in nature given the device specs and user interface. Yet, mobile phones are powerful enough to stand up to the ‘core’ game experience and enable cross-platform play.

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									
2	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)
3									
4	Ludo King (Tabletop Ludo)	Royal Match (Match M3-Meta)	Chess.com (Tabletop Chess)						
5	Candy Crush Saga (Match M3)	Honkai: Star Rail (RPG Team Battle)	Wordscapes (Puzzle Word)						
 Download data									

Source: data.ai Intelligence | Note: Top apps by year-over-year download and consumer spend growth across iOS and Google Play. MAU Growth on iPhone and Android Phone. Games apps are classified using data.ai's Game IQ taxonomy as of Jan 4, 2024.

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

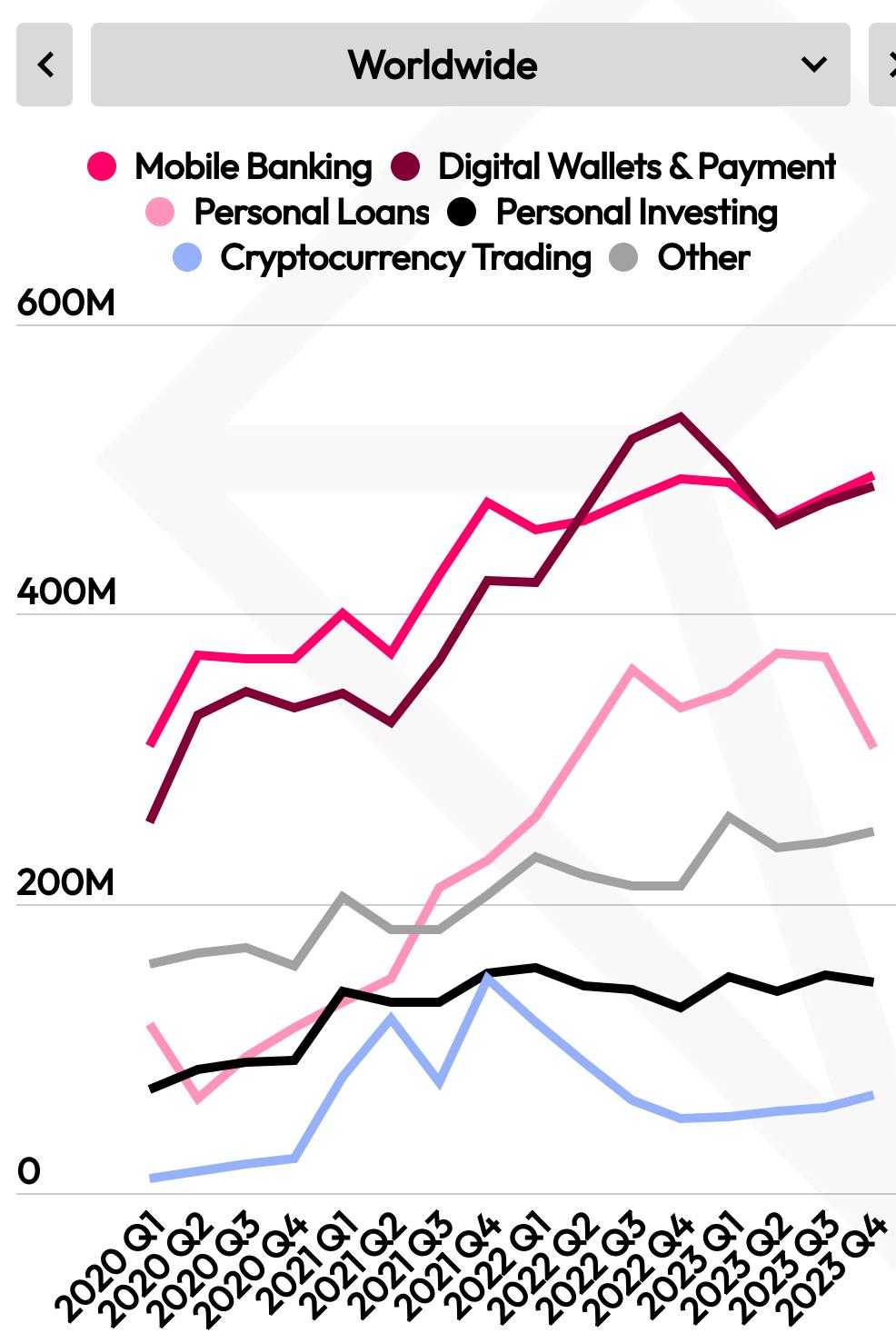
Allstate Mobile Product Director





Finance Subgenre App Downloads by Country

Powered by data.ai's App IQ Taxonomy



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.

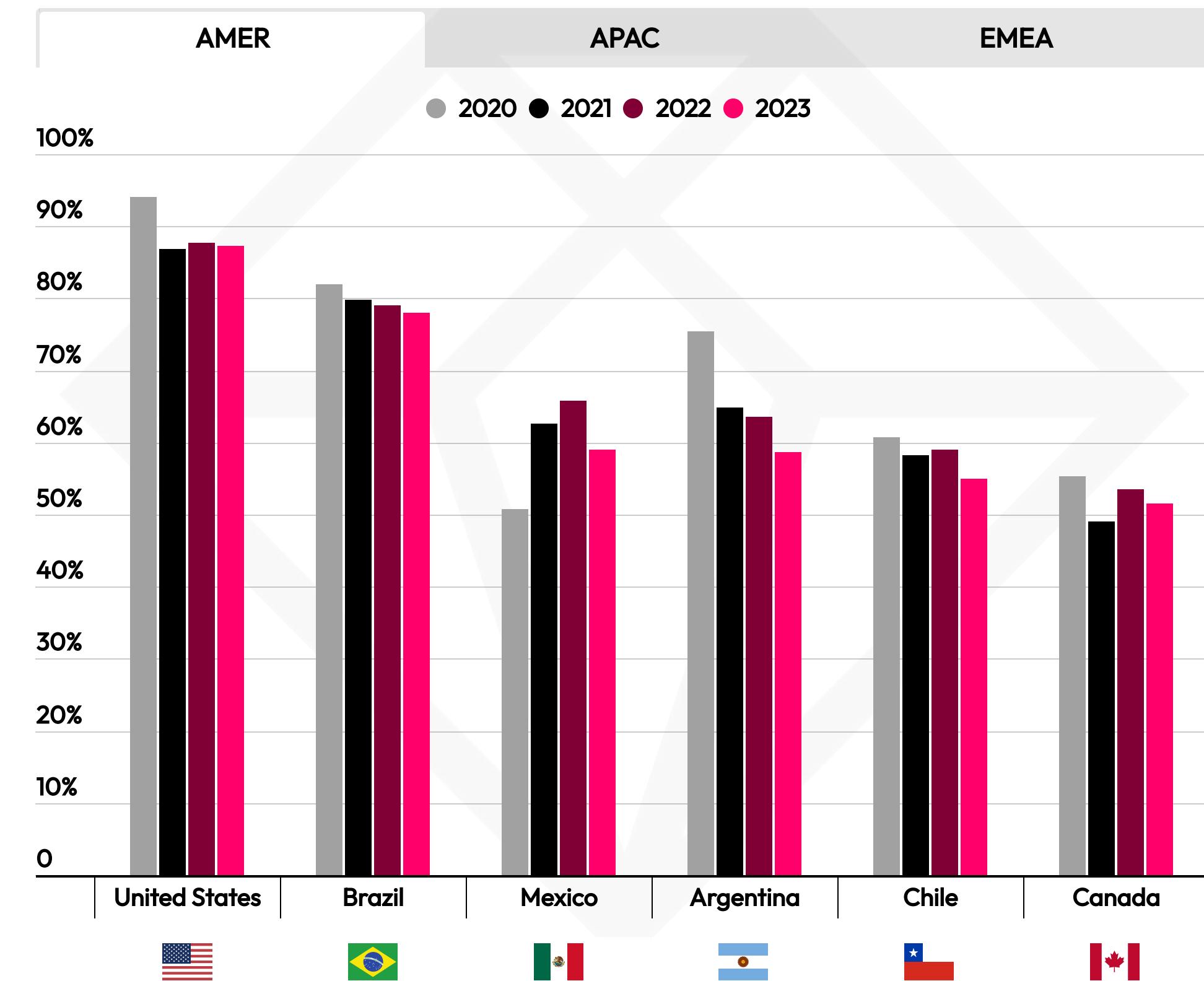
Know Your Market – Local Publishers Dominate their Mobile Finance Markets

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

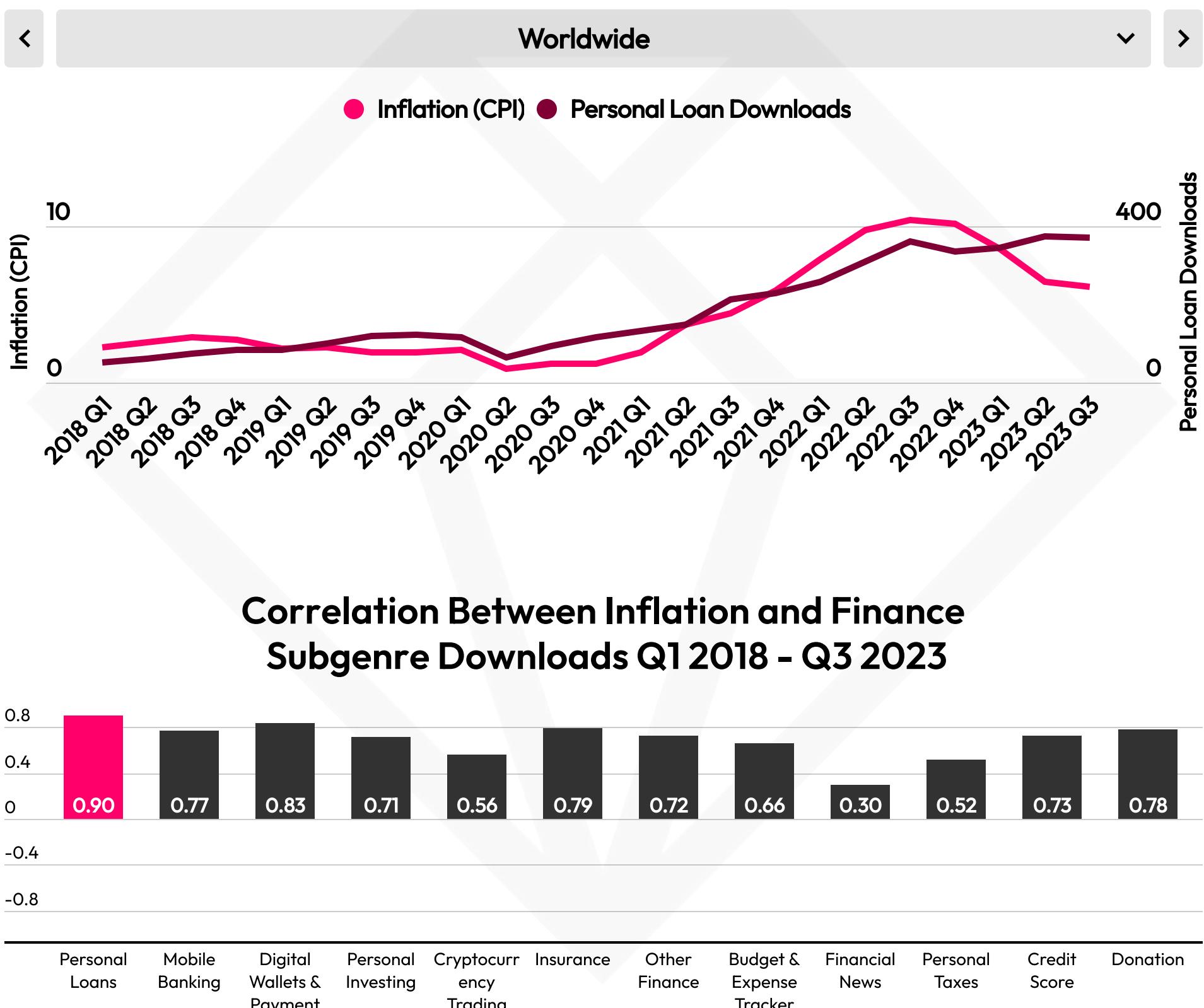


Source: data.ai Intelligence | Note: Downloads across iOS and Google Play; China is iOS only.
Finance apps are classified using data.ai's App IQ taxonomy.



Inflation vs. Personal Loan Downloads

FINANCE



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.

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%).

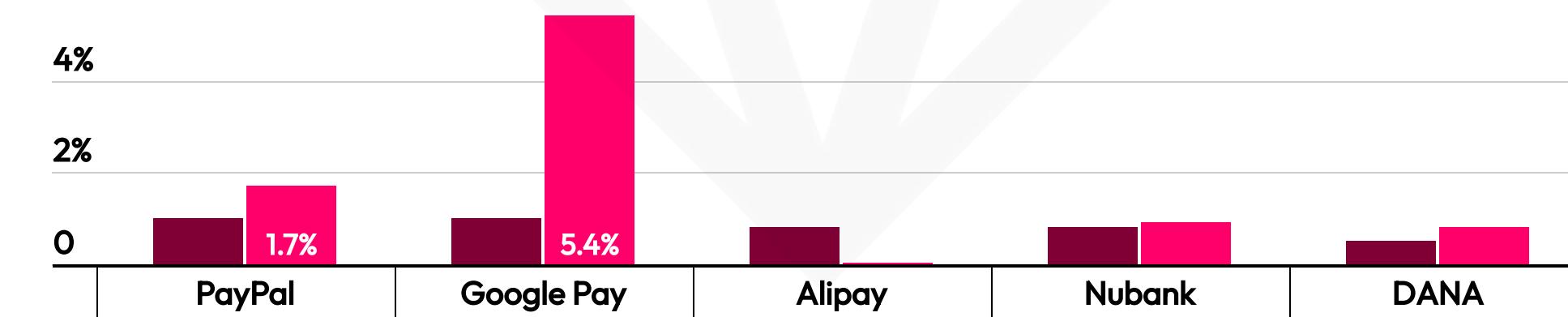
Another component of data.ai's App IQ taxonomy is the feature tags — with 20 different features tagged specific to the Finance genre alone. [Filter by different features](#) to see what is helping apps stay on top.

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"

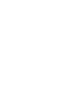
● Share of Finance Downloads ● Share of Finance MAU



Source: data.ai Intelligence | Note: Includes Mobile Banking and Digital Wallets & Payment apps among the top 10 Finance apps by downloads in each market.



2023 Rankings by Market | Finance

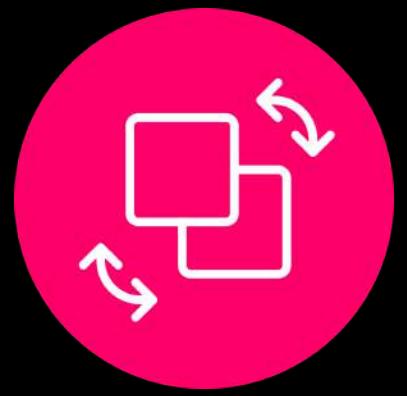
AMER - Breakout Downloads									
	Worldwide	United States	Canada	Mexico	Brazil	Argentina	Colombia	Chile	Peru
1	 B-Love Network (Finance Other Finance)	 CoinSnap: Value Guide (Finance Other Finance)	 RBC Mobile (Finance Mobile Banking)	 Banco del Bienestar Movil (Finance Mobile Banking)	 Nubank (Finance 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 Recibir - 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)	 Préstamo Rápido-Credit Easy (Finance Personal Loans)	 Deseo Crédito-préstamo (Finance Personal Loans)	 OK Préstamo-Préstamo Rápido (Finance Personal Loans)

Source: data.ai Intelligence | Note: Top Apps by year-over-year downloads growth across iOS, Google Play. MAU Growth on iPhone and Android Phone. Finance apps are classified using data.ai's App IQ taxonomy as of Jan 4, 2024.

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

RETAIL



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

Mobile Shopping Time Spent Remains Well Above Pre-Pandemic Levels

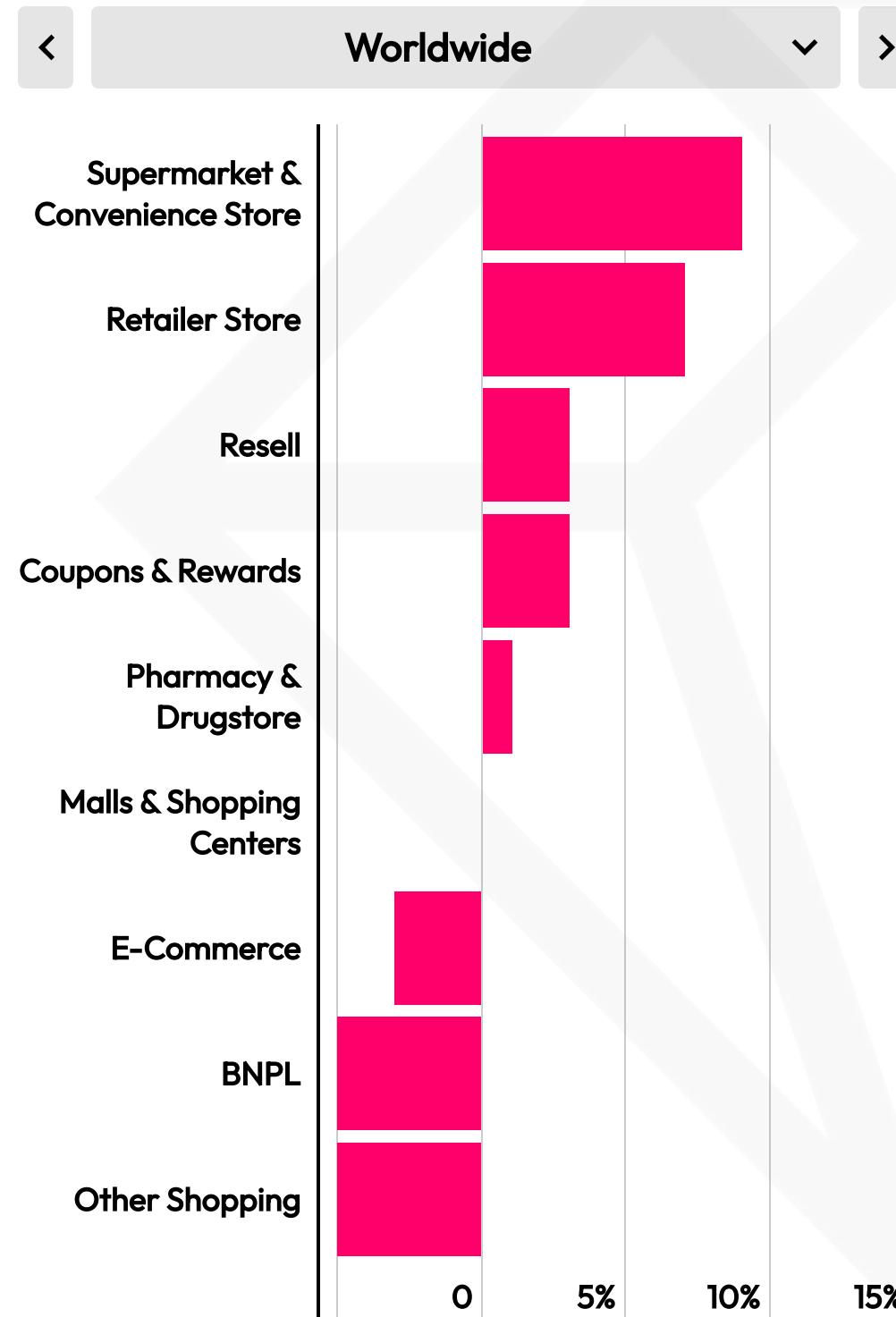
The economic headwinds, combined with a natural contraction from the huge mobile growth seen early in the pandemic, led to a slight dip in total time spent in Shopping apps. Total hours declined 1% year-over-year in 2023, though it was still up more than 25% compared to 2020.

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



Top Apps by Breakout Downloads in 2023

	App	Subgenre
1	TEMU	E-Commerce
2	S	E-Commerce
3	AliExpress	E-Commerce
4	Tiktok Seller	Retailer Store
5	豆物	E-Commerce
6	跨年分10亿	E-Commerce
7	95分	Resell
8	1688	E-Commerce
9	LR	E-Commerce
10	WB	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.



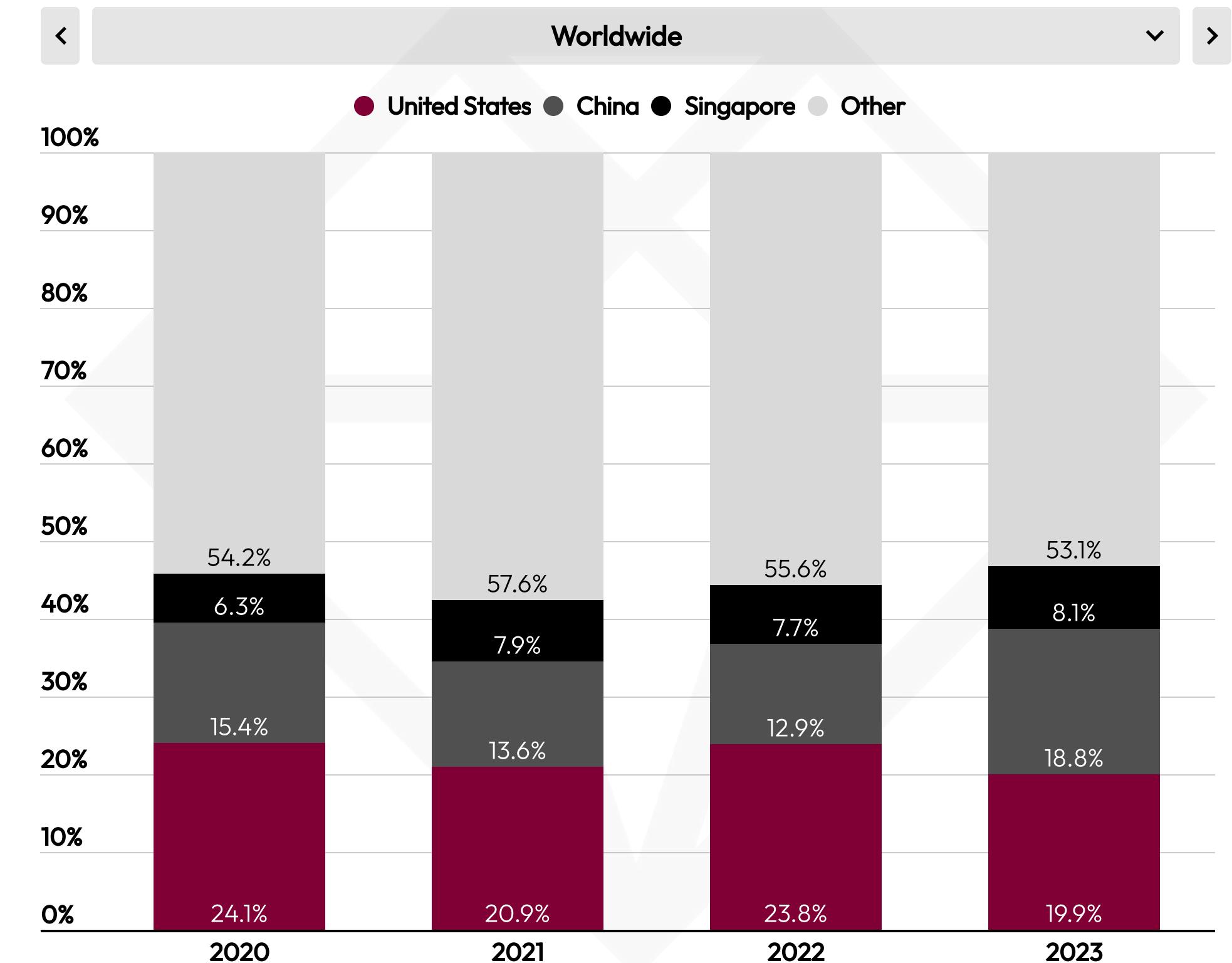
Going Global: SHEIN and Temu Break into Markets Across the Globe

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



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.



2023 Rankings by Market | Shopping

AMER - Breakout Downloads									
	Worldwide	United States	Canada	Mexico	Brazil	Argentina	Colombia	Chile	Peru
1									
2	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)
3									
4		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)
5		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)
									

Source: data.ai Intelligence | Note: Top Apps by year-over-year downloads growth across iOS, Google Play. MAU Growth on iPhone and Android Phone. Shopping apps are classified using data.ai's App IQ taxonomy as of Jan 4, 2024.

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.'

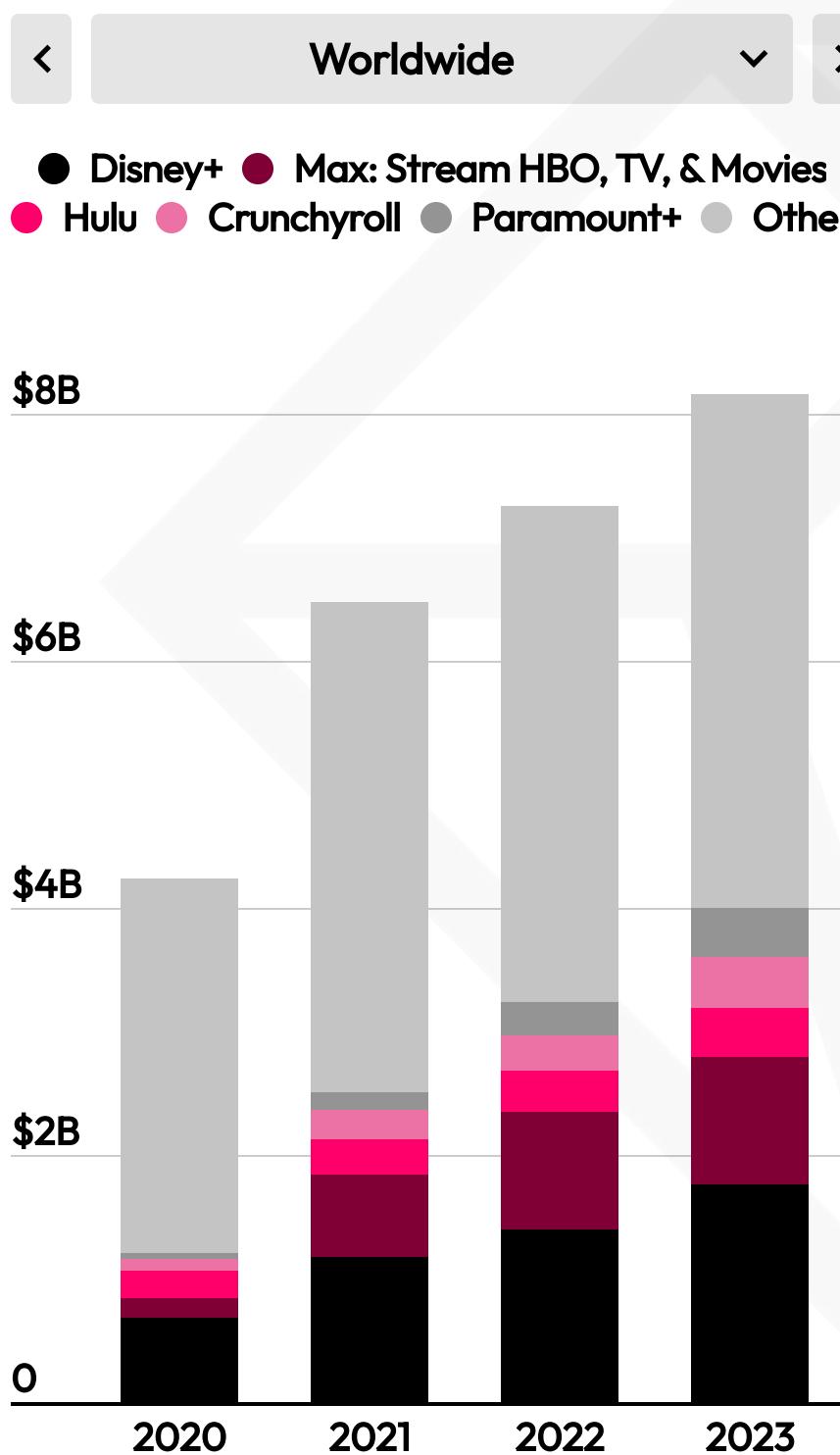
Dor Isseroff

COO

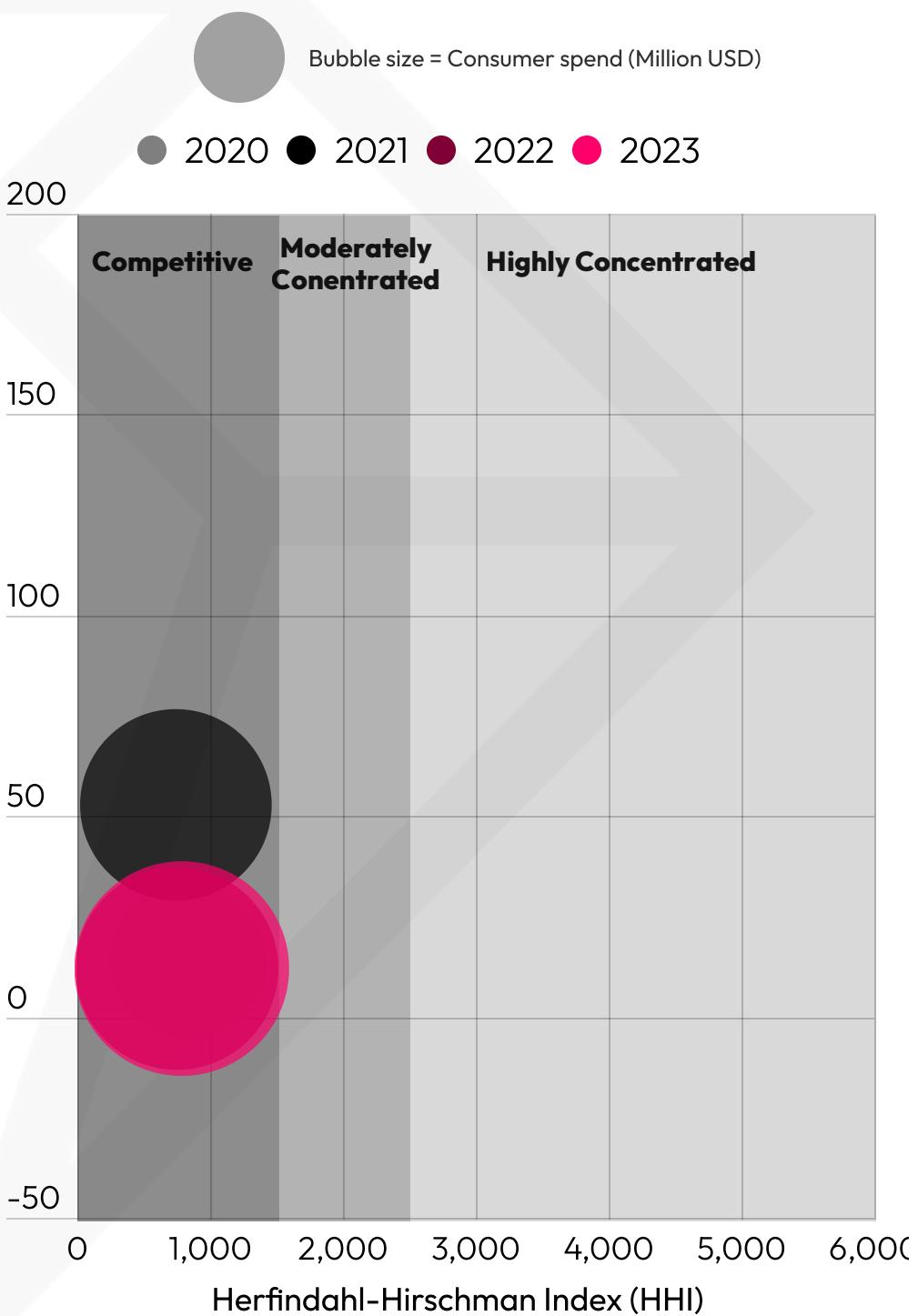




Yearly OTT Consumer Spend by Market



OTT Revenue Growth vs. Market Concentration (Herfindahl-Hirschman Index)



VIDEO STREAMING

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, a slight acceleration from the 12% growth in 2022.

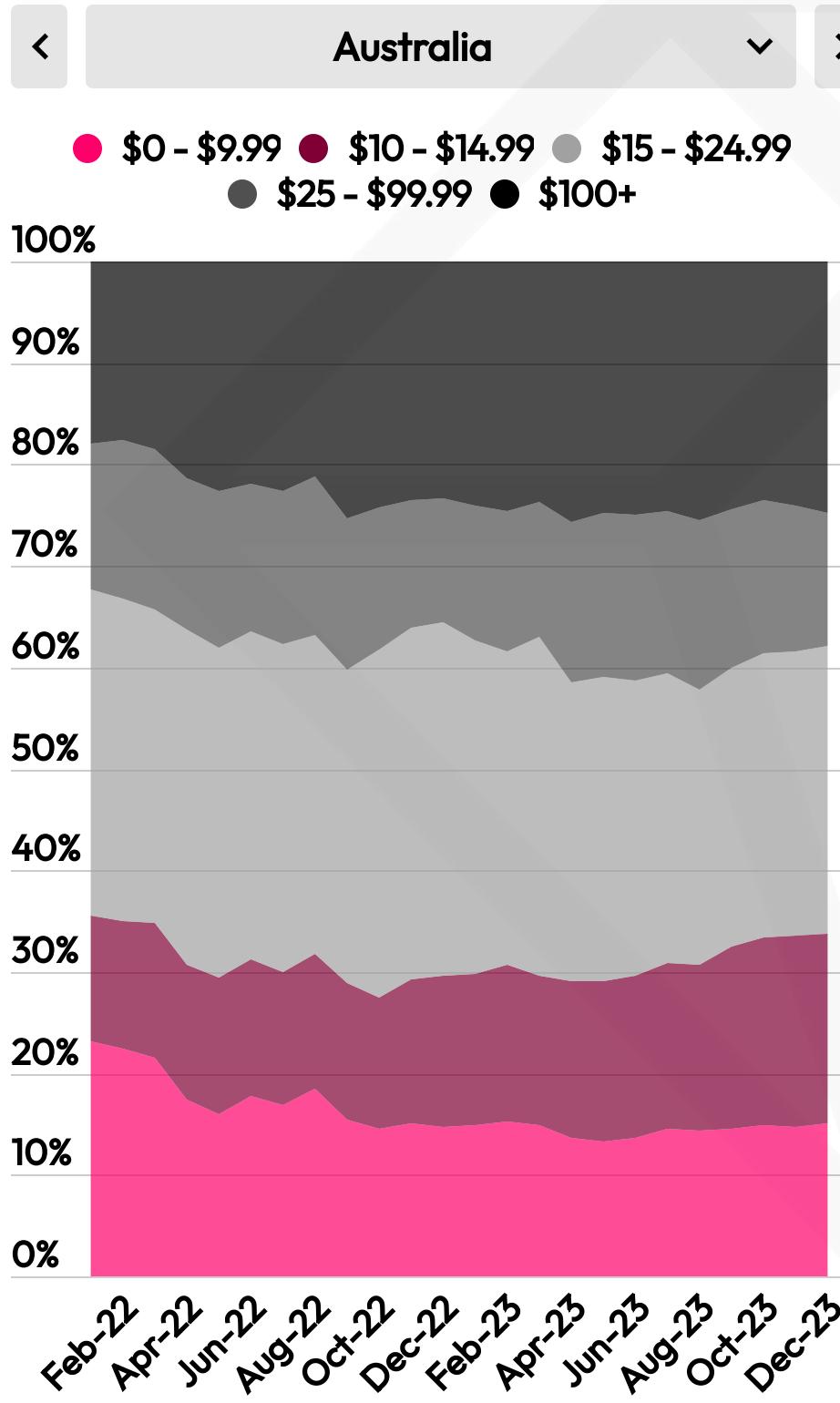
This growth came even as the market became a little less competitive. The top five streamers combined for nearly 50% of the market in 2023, up from 45% in 2022. [Disney+](#), the top app each of the past four years, gained even more market share as well.

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



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



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)	Pluto.tv (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.

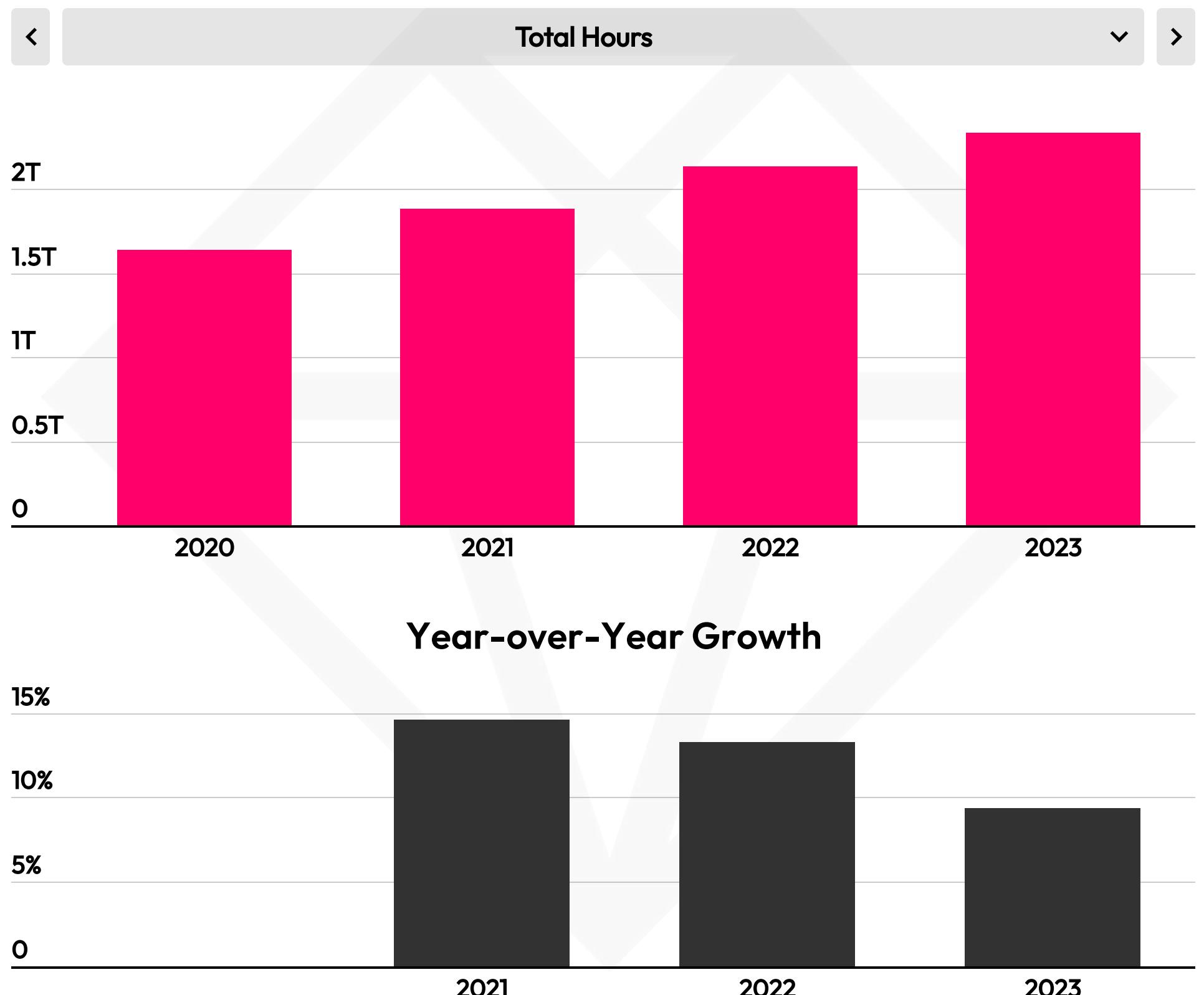
David Lee

Head of Apps, Global Business Solutions - North America





Global Metrics for Social Apps



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.

SOCIAL

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.

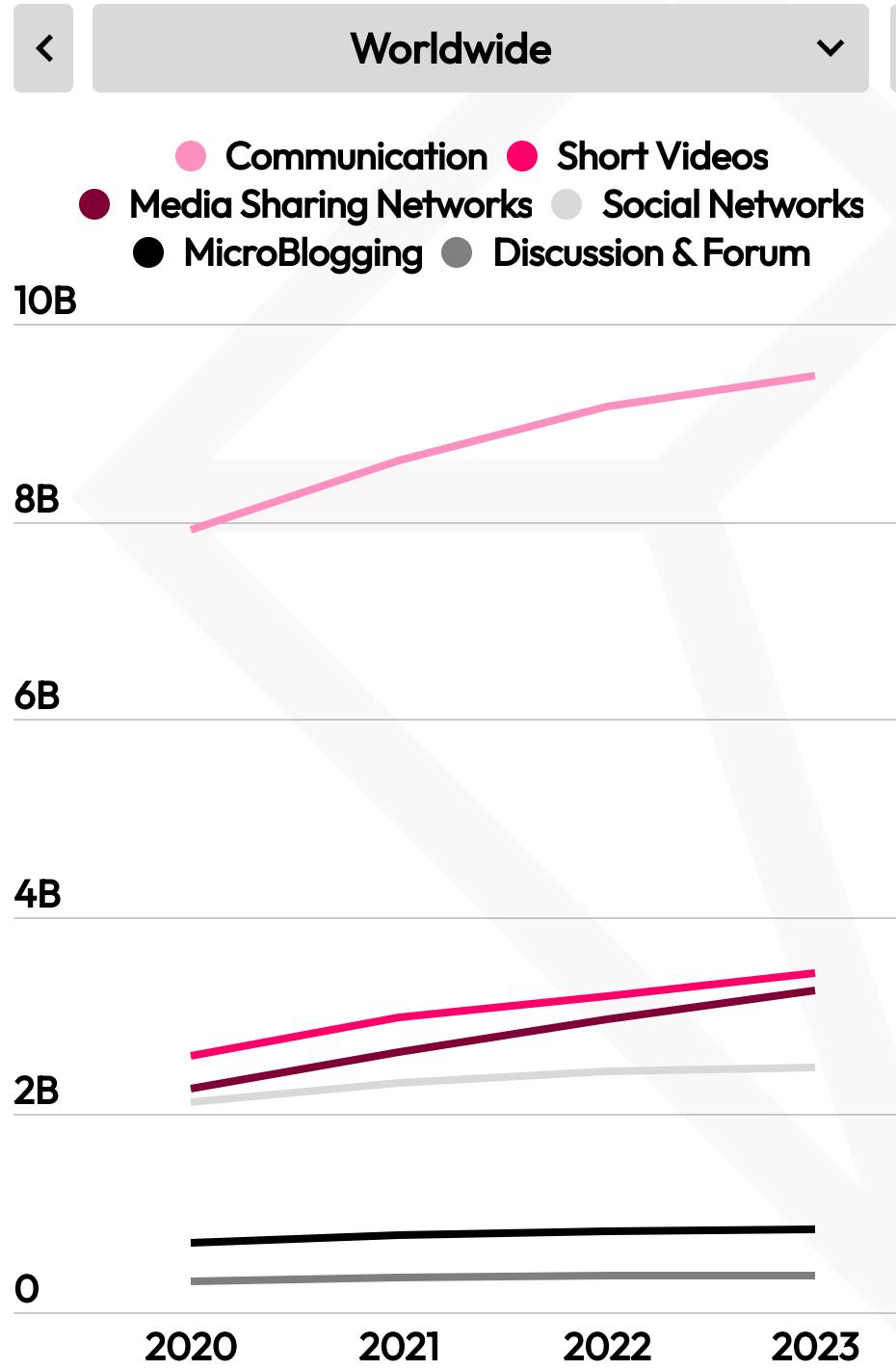
Consumer spend growth also remained strong at 13% year-over-year to nearly \$9 billion in 2023. Top social platforms are continuing to unlock monetization strategies outside of advertising, with [TikTok](#), the best app monetizer in the history of the app stores, as a prime example.

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.

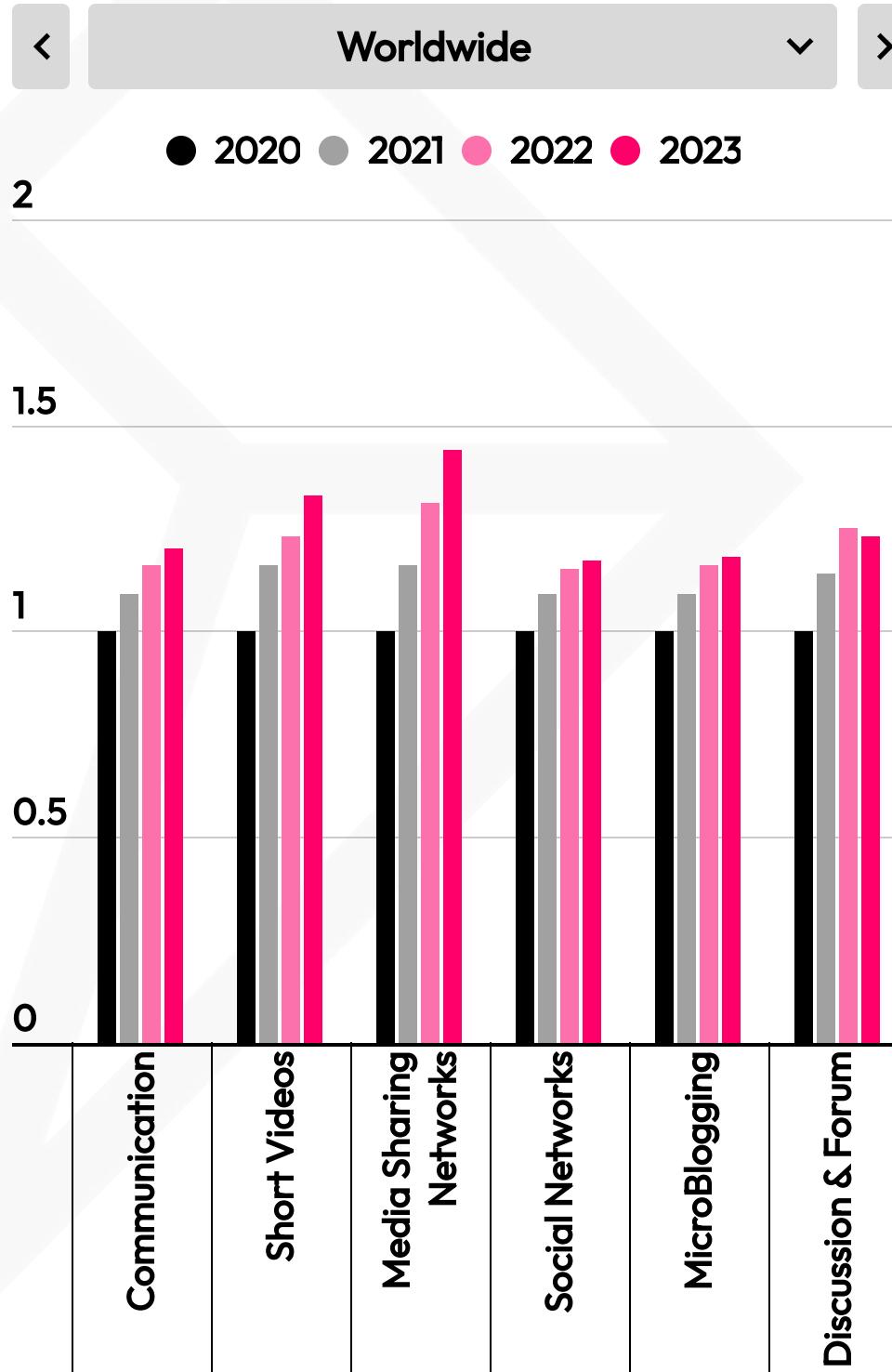
Need tips on how to keep up with the shift towards in-app purchase revenue for social apps? Check out our latest [Monetization Guide](#).



Average Annual Monthly Active Users for Social Apps by Subgenre



Annual Monthly Active Users Growth Indexed to 2020



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.

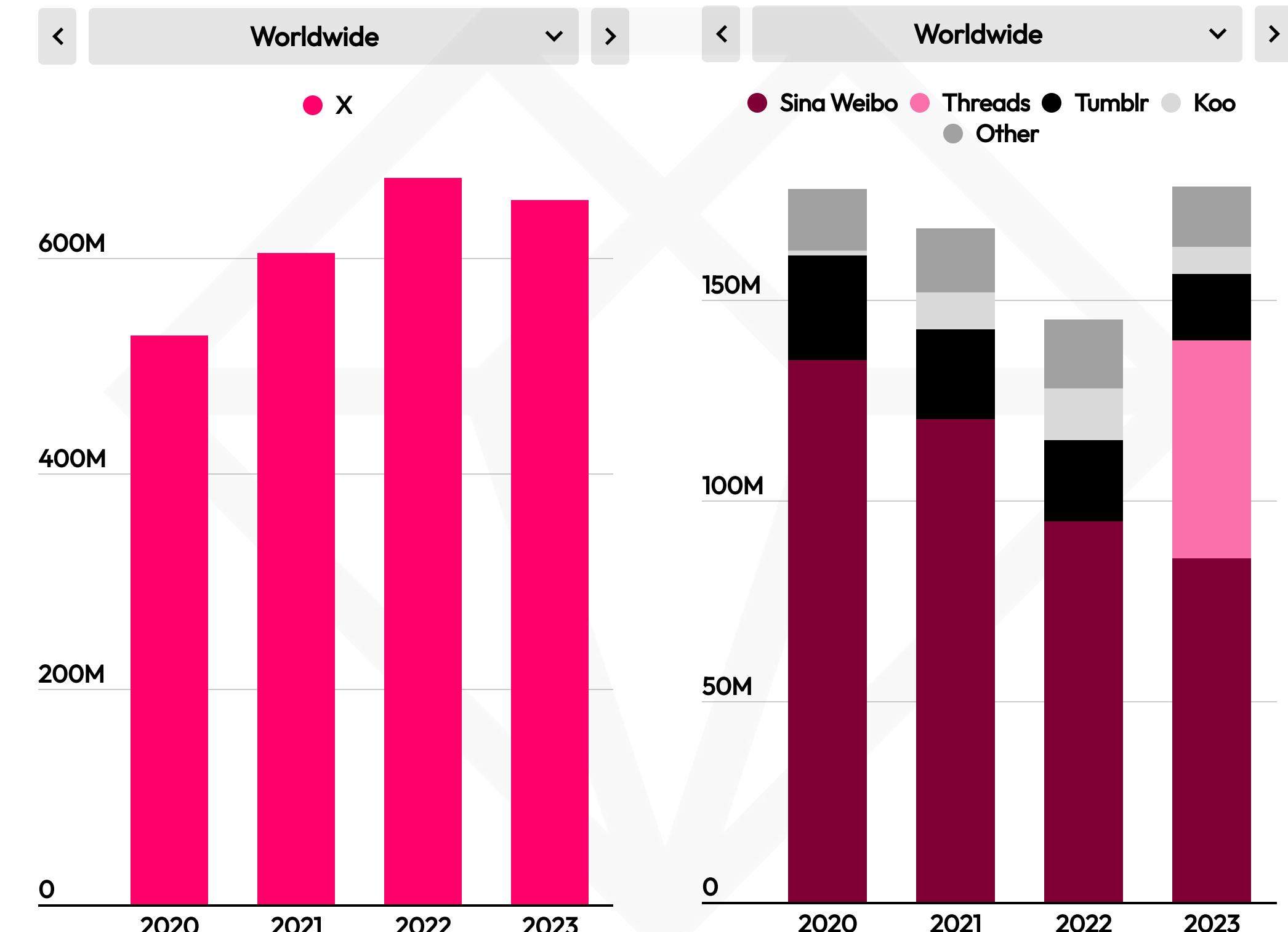
Are Visual-Focused Social Apps Making MicroBlogging Less Relevant?

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



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

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.](#)

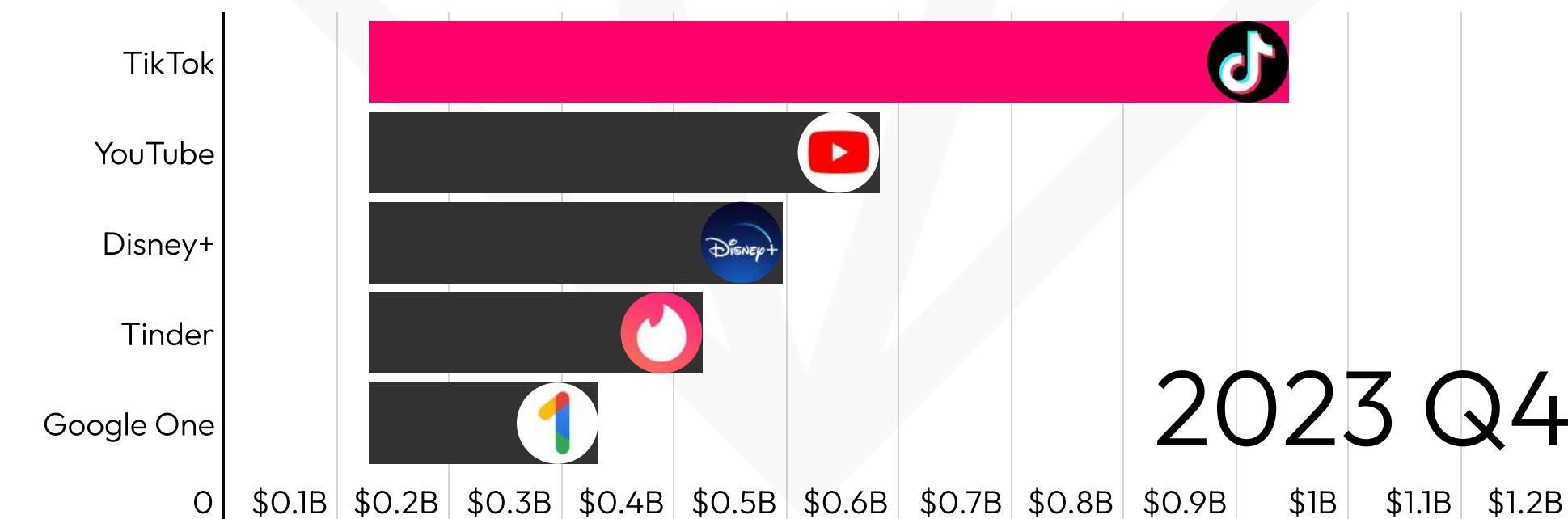
Which ones will reach \$10 billion next and which ones are losing steam?

Top Apps by Cumulative Consumer Spend Over Time 2013 - 2023



2023 Q4

Top Apps by Quarterly Consumer Spend Over Time 2013 - 2023



2023 Q4

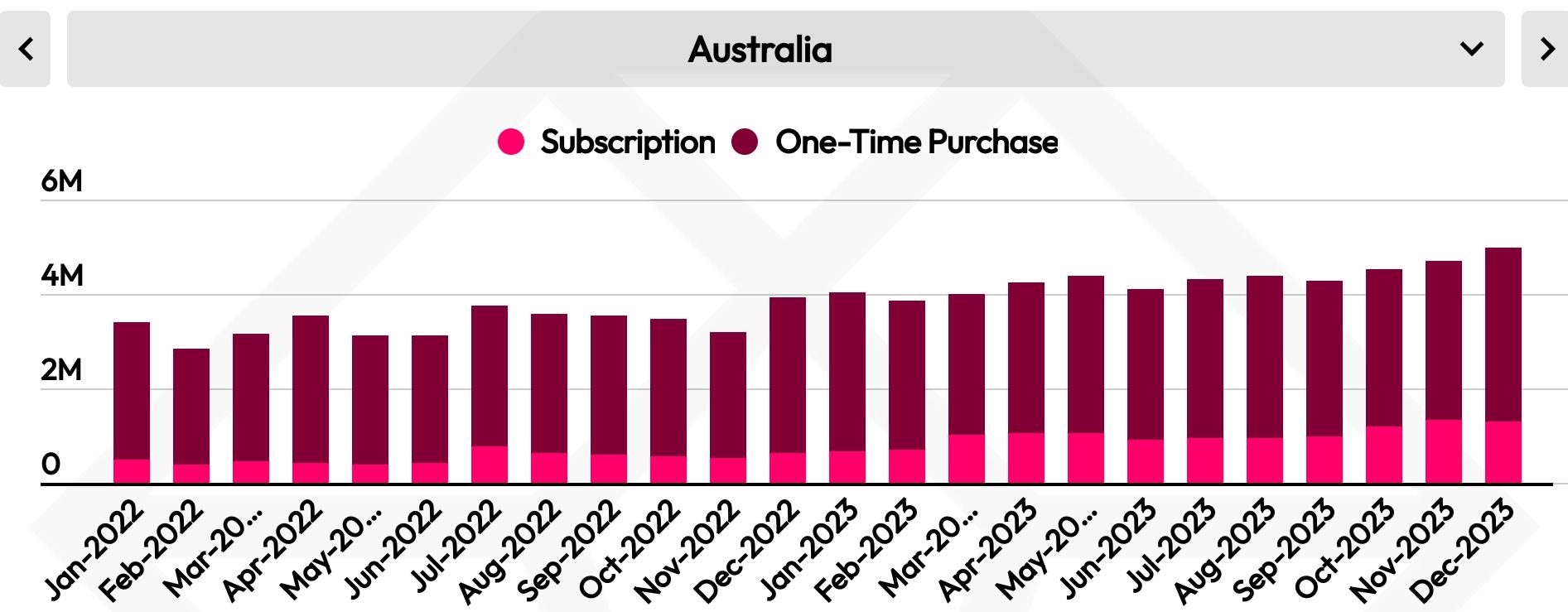
Source: data.ai Intelligence | Note: Consumer Spend across iOS, Google Play; China is iOS only. Spend is gross — inclusive of any percent taken by the app stores. Excludes mobile games



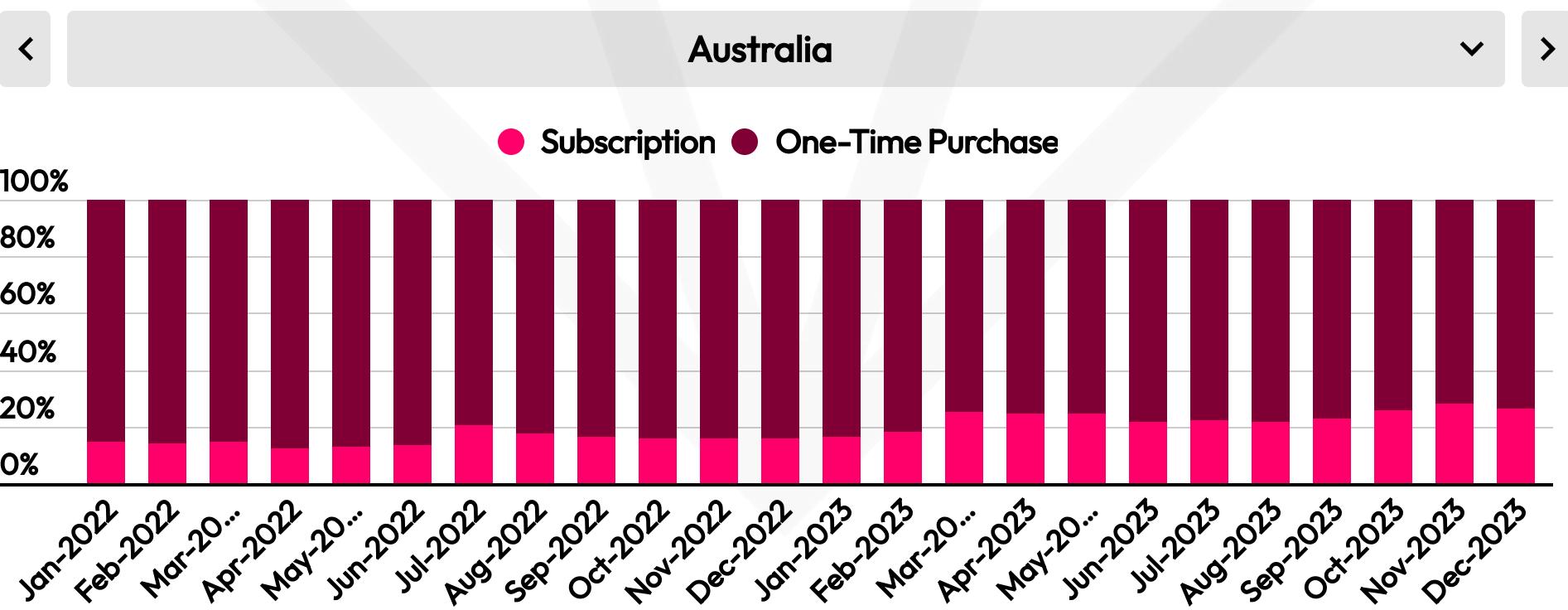


Subscription vs. One-Time Purchase Consumer Spend for Social Apps

SOCIAL



Share of Consumer Spend



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

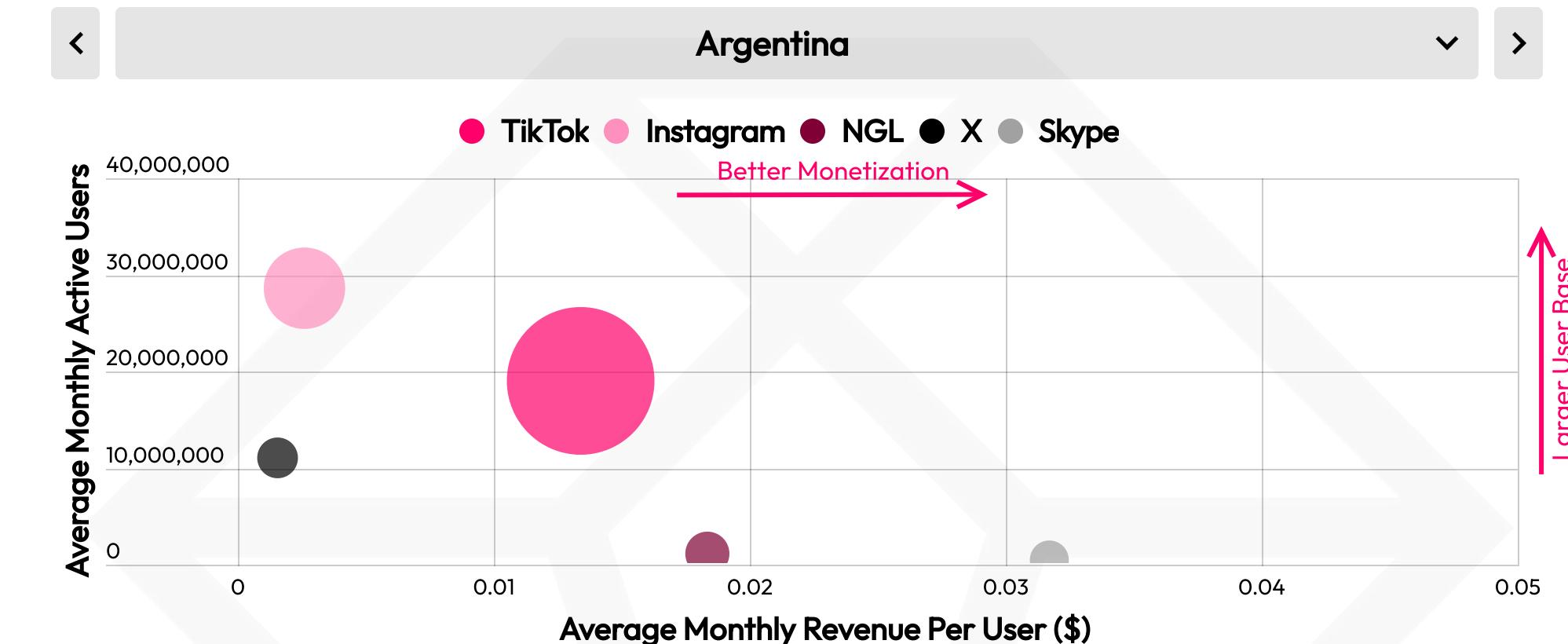
TikTok now earns more than \$1 per user in the United States, up from just 67 cents per user in 2022. Among the top five apps by total consumer spend, Discord ranks a distant second at 17 cents per user.

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

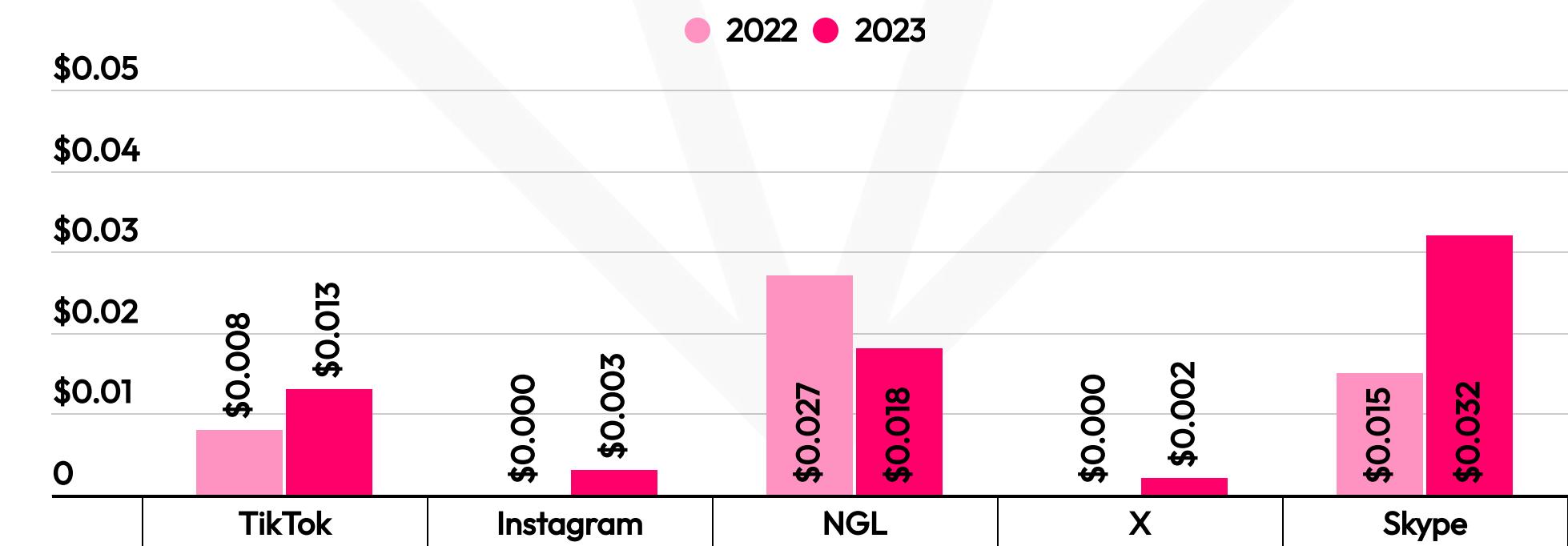
It'll be interesting to see how long these social platforms can maintain this strong monetization. In-app purchases are becoming a critical way for social platforms to mitigate the risks seen in the advertising market.

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

Social App Monetization



Yearly Average Monthly ARPU for Top Social Apps



Source: data.ai Intelligence | Note: Consumer Spend across iOS, Google Play; China is iOS only. MAU across iOS, Android; China is iOS only. Spend is gross — inclusive of any percent taken by the app stores. Social apps are classified using data.ai's App IQ taxonomy and include Short Videos apps from the Entertainment genre and excludes Dating.



2023 Rankings by Market | Social

	AMER - Downloads	AMER - Consumer Spend	APAC - Downloads	APAC - Consumer Spend	EMEA - Downloads	EMEA - Consumer Spend
Worldwide						
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)
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)	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)
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)
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)

Source: data.ai Intelligence | Note: Top Apps by yearly Downloads and Consumer Spend across iOS, Google Play.
Social apps are classified from Social Media (excluding Dating) and Entertainment - 'Short Videos' and 'Live Streaming' subgenres using data.ai's App IQ taxonomy as of Jan 4, 2024.

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.

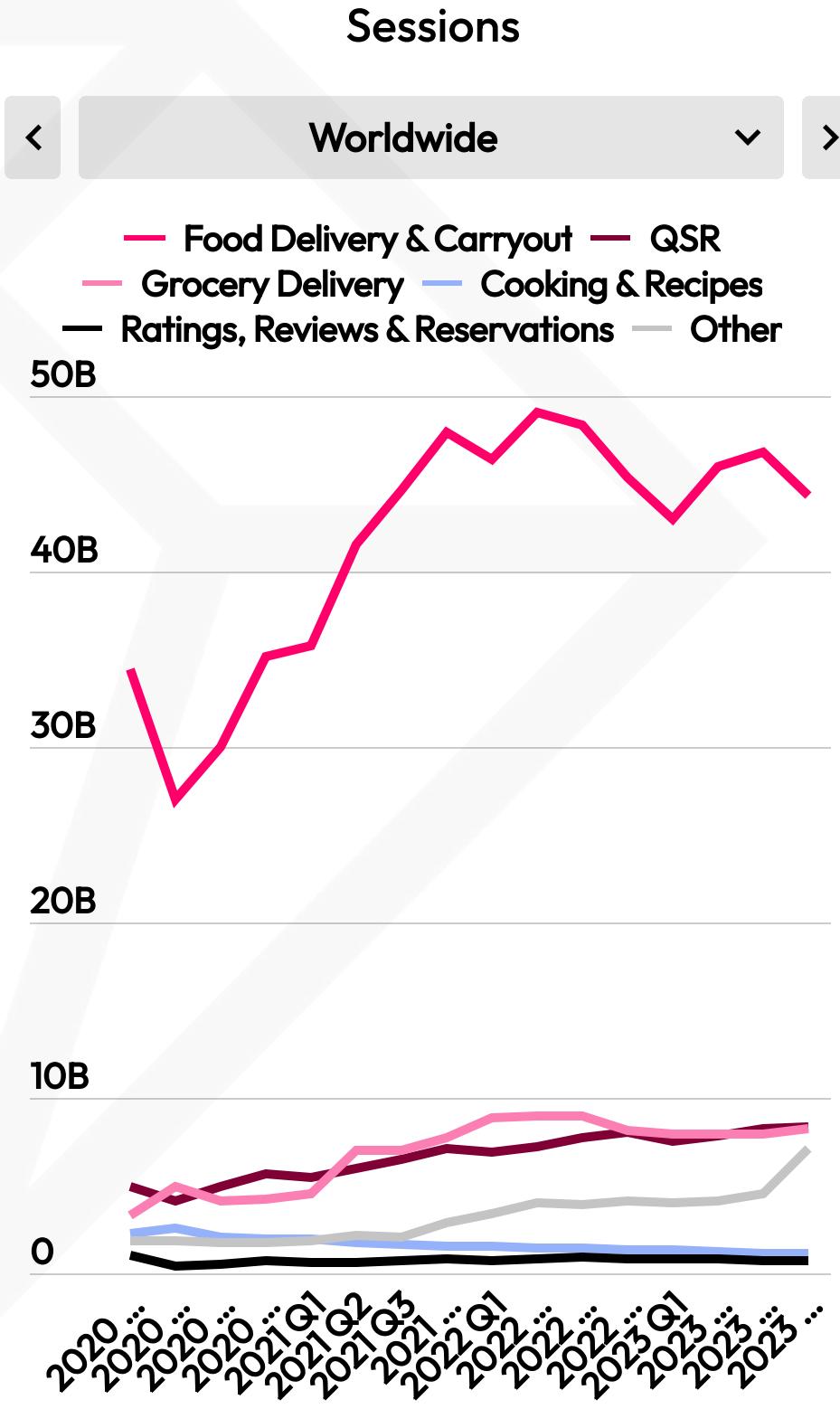
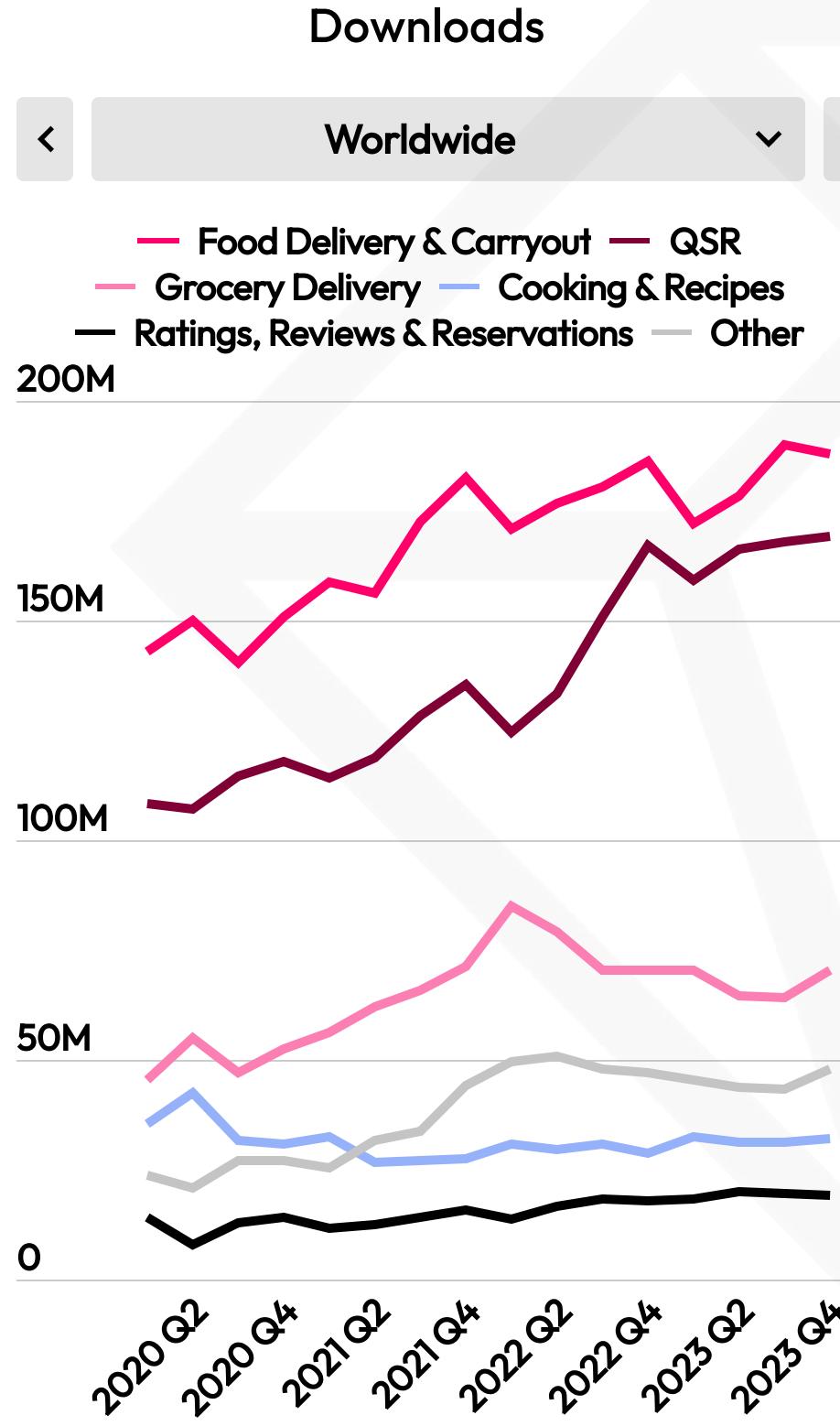
Ajay Kaul

Global Performance Marketing Head





Quarterly Metrics for Food & Drink Subgenres by Market



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



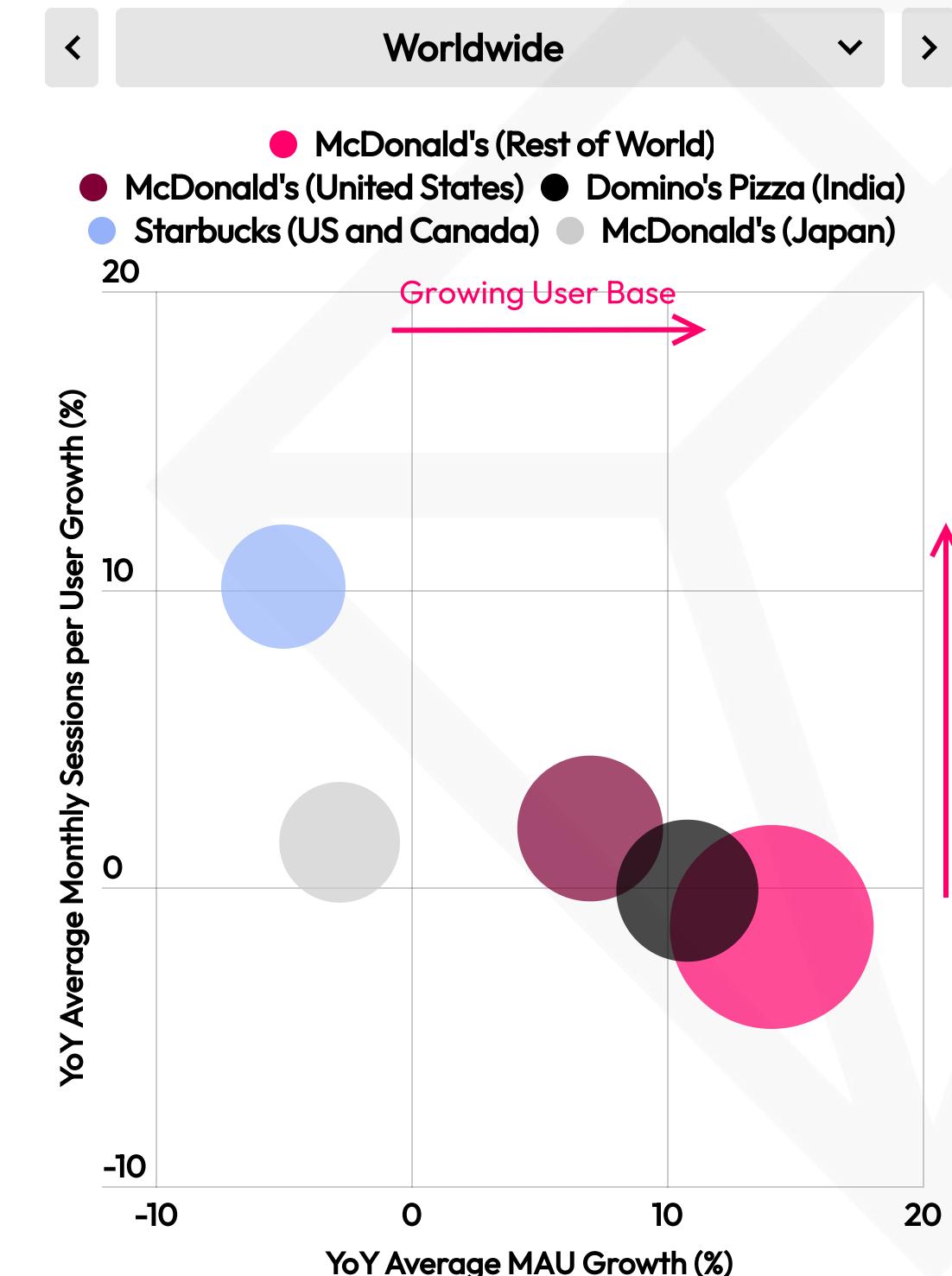
Mobile Apps Provide a Valuable Way to Boost Customer Loyalty

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



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 
1 Zomato (Food & Drink Food Delivery & Carryout)  McDonald's App (Food & Drink QSR)	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) 
2 McDonald's App (Food & Drink QSR)  DoorDash (Food & Drink Food Delivery & Carryout) 	Uber Eats (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) 	DiDi Food (Food & Drink Food Delivery & Carryout) 
3 Uber Eats (Food & Drink Food Delivery & Carryout)  Uber Eats (Food & Drink Food Delivery & Carryout) 	DoorDash (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) 
4 Grab (Food & Drink Food Delivery & Carryout)  Starbucks (Food & Drink QSR) 	Tim Hortons (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) 
5 ele.me (Food & Drink Food)  Domino's Pizza USA (Food & Drink 	Domino's Pizza USA (Food & Drink 	Starbucks (Food & Drink 	Dominos MX (Food & Drink 	Habibs (Food & Drink 	Burger King Araentina (Food & Drink 
Rappi (Food & Drink Food Delivery & Carryout)  PedidosYa (Food & Drink Food Delivery & Carryout) 	SPID (Food & Drink Food Delivery & Carryout) 	SPID35: Miles de productos (Food & Drink Grocery Delivery) 	Spid35: Miles de productos (Food & Drink Grocery Delivery) 	Spid35: Miles de productos (Food & Drink Grocery Delivery) 	Rappi (Food & Drink Food Delivery & Carryout) 
Rappi (Food & Drink Food Delivery & Carryout)  PedidosYa (Food & Drink Food Delivery & Carryout) 	Tiendas Ya Domicilio De Bebidas (Food & Drink Food Delivery & Carryout) 	Tiendas Ya Domicilio De Bebidas (Food & Drink Food Delivery & Carryout) 	Tiendas Ya Domicilio De Bebidas (Food & Drink Food Delivery & Carryout) 	Tiendas Ya Domicilio De Bebidas (Food & Drink Food Delivery & Carryout) 	DiDi Food (Food & Drink Food Delivery & Carryout) 

Source: data.ai Intelligence | Note: Top Apps by yearly Downloads across iOS, Google Play. MAU rankings by Yearly Average MAU across iPhone and Android Phone. Food & Drink apps are classified using data.ai's App IQ taxonomy as of Jan 4, 2024

Top Features Loved by Food & Drink



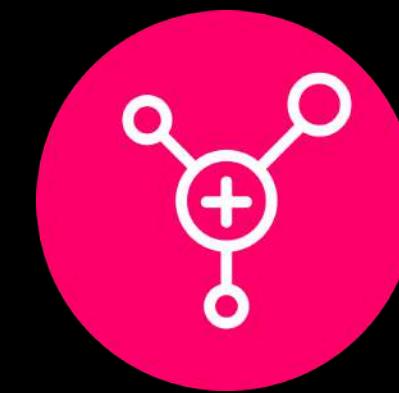
Keywords



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.

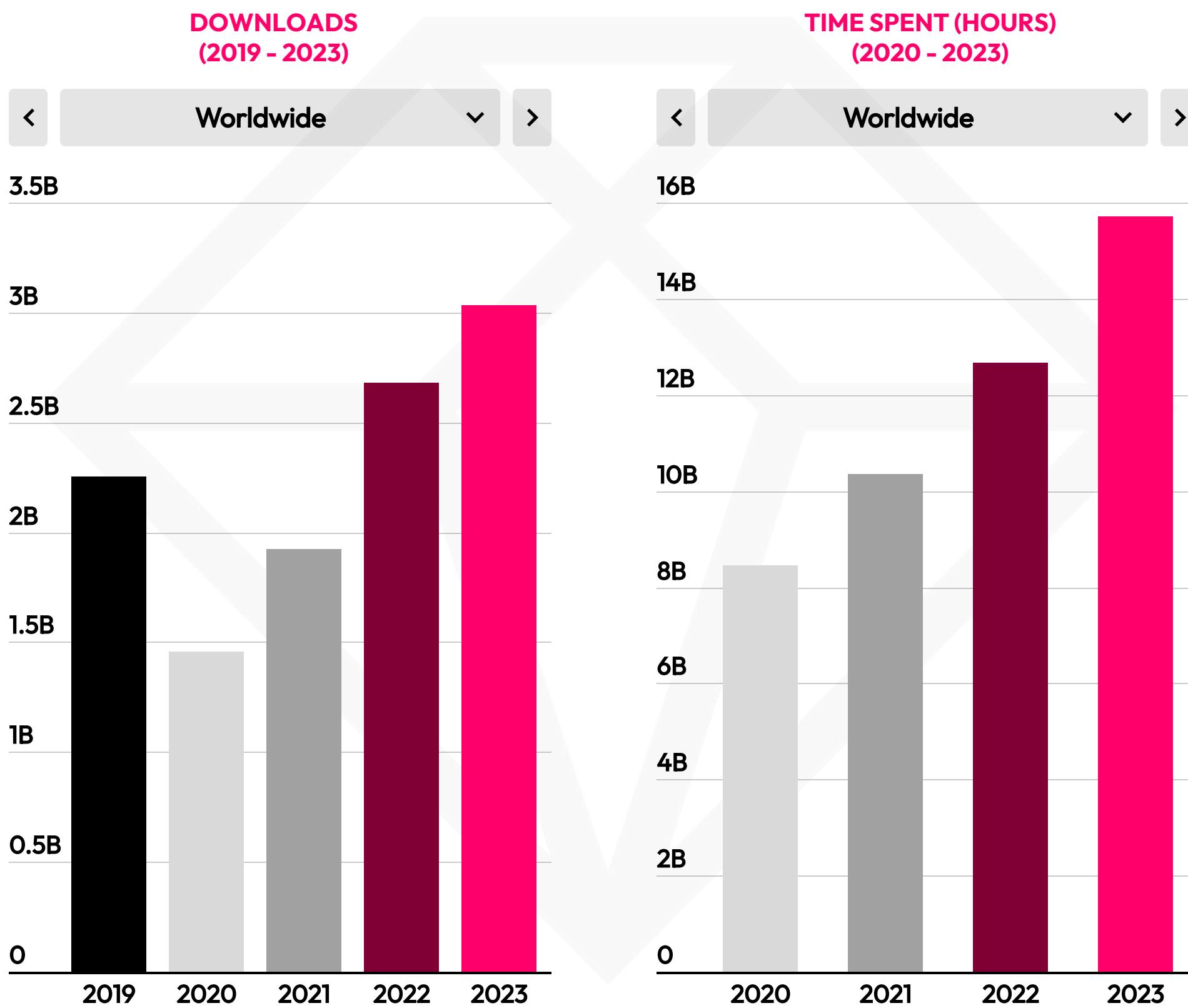
Han Feng
Senior Marketing Director

Trip.com



Travel App Trends in Key Markets

TRAVEL



Record-Breaking Travel Continued in 2023 with Downloads Up 34% 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.

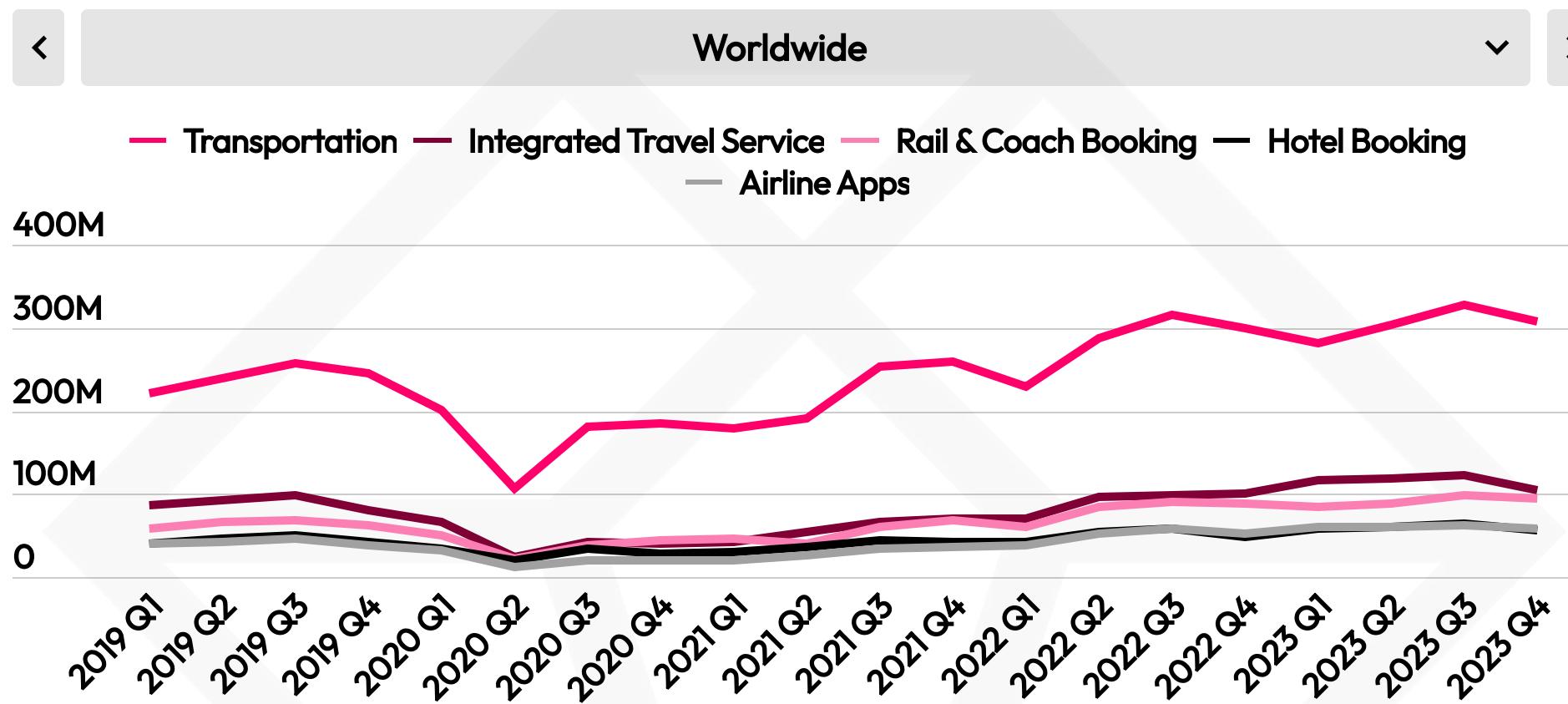
With outsized growth coming from pent up demand following years of low travel, it was uncertain whether these gains would hold in 2023. The results are in and it is clear that the huge demand for travel was not a one-off.

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

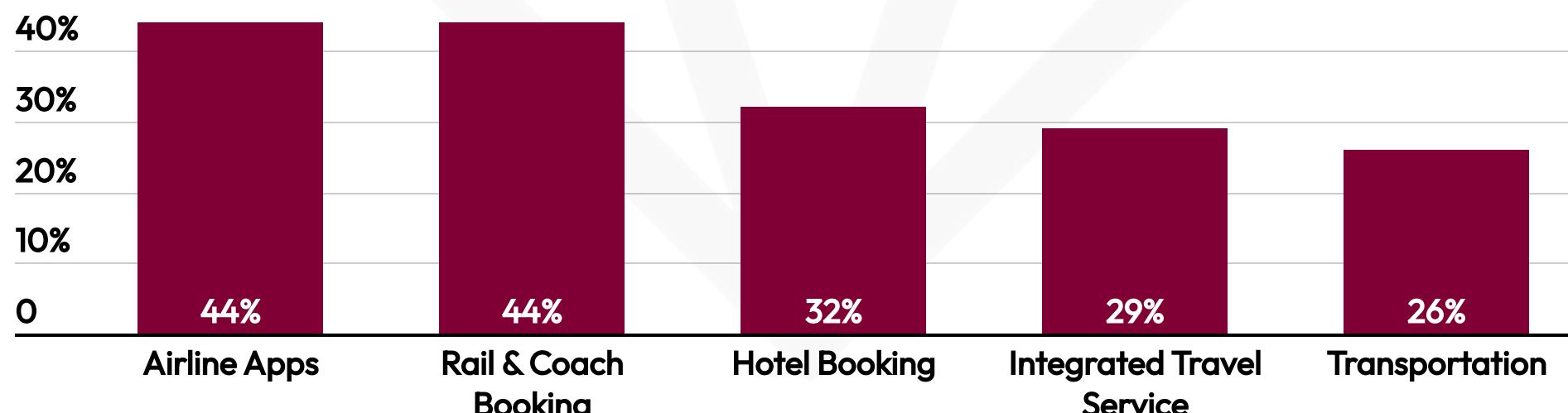
[Check out our analysis](#) of the record-setting travel during the summer of 2023



Quarterly Travel App Downloads by Subgenre



Download Growth Between 2019 and 2023



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

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

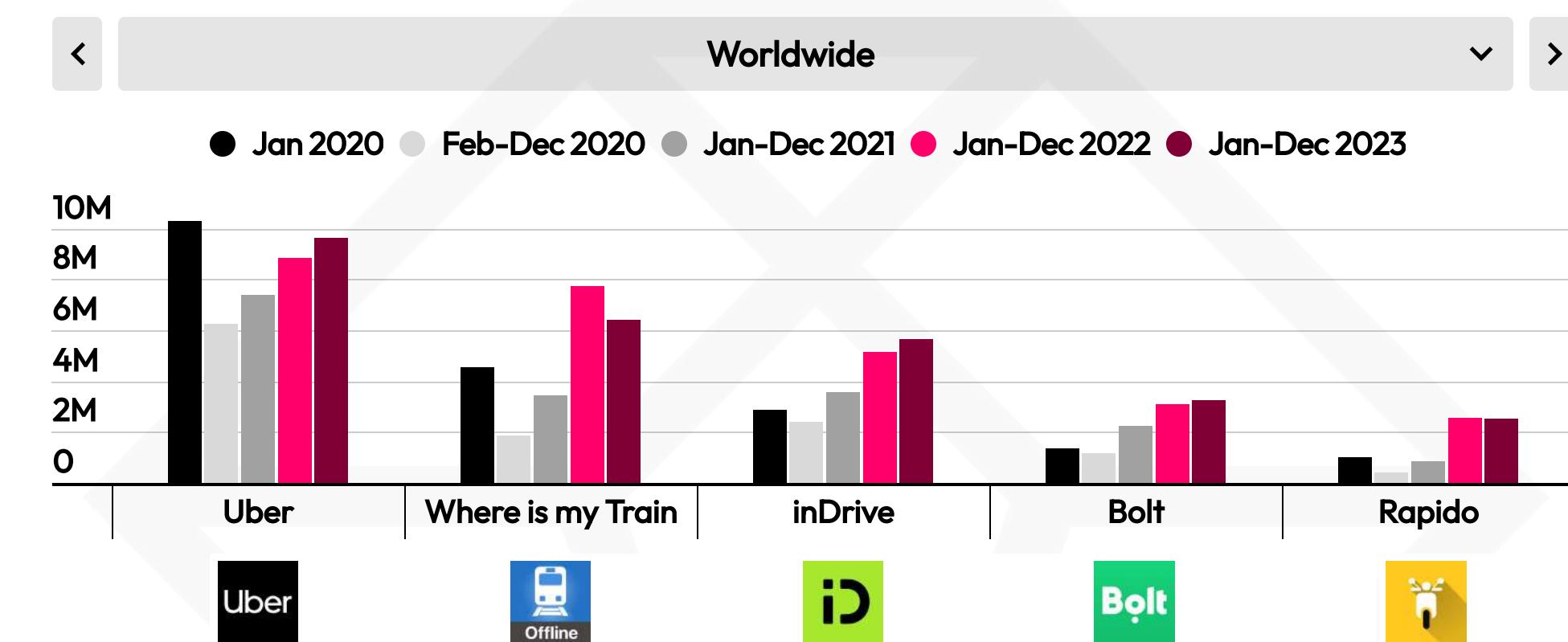
Downloads and sessions for top rideshare apps like [Uber](#) have continued to improve from the low seen in 2020 during the pandemic. However, many apps have yet to reach the levels they had in January 2020 (before the start of the pandemic in most countries).

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

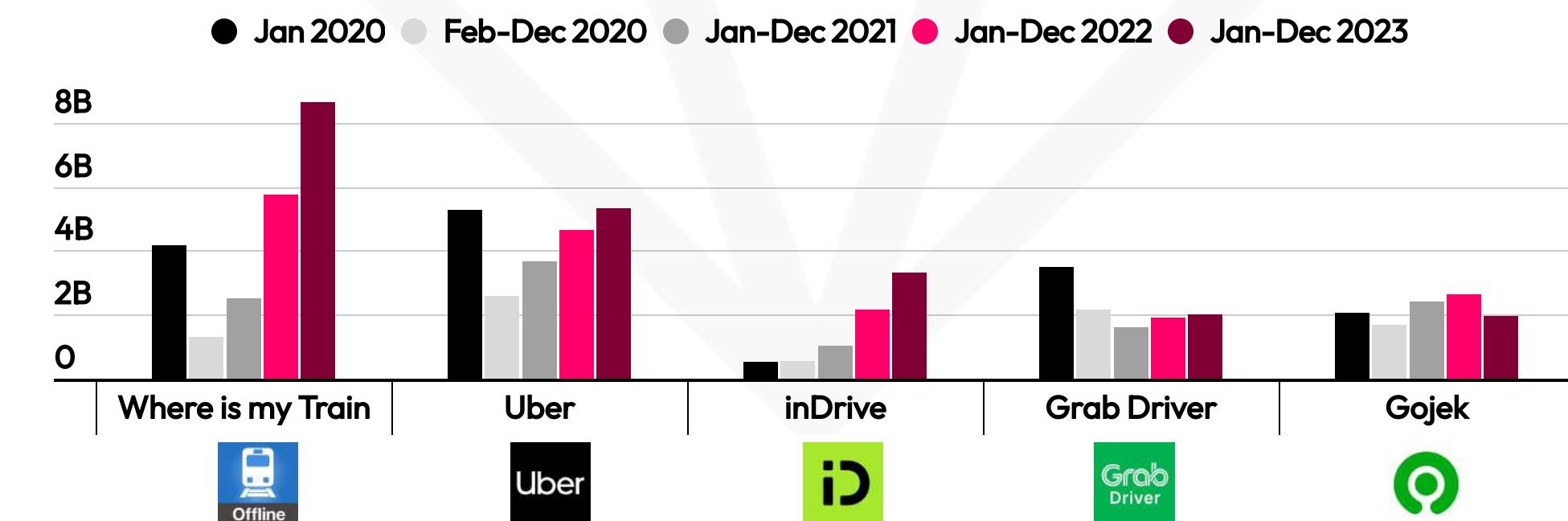
Has rideshare audience attention returned? Find out with [Insights Generator](#), part of data.ai Intelligence

Top Transportation App Downloads and Session Trends

Average Monthly Downloads



Average Monthly Sessions

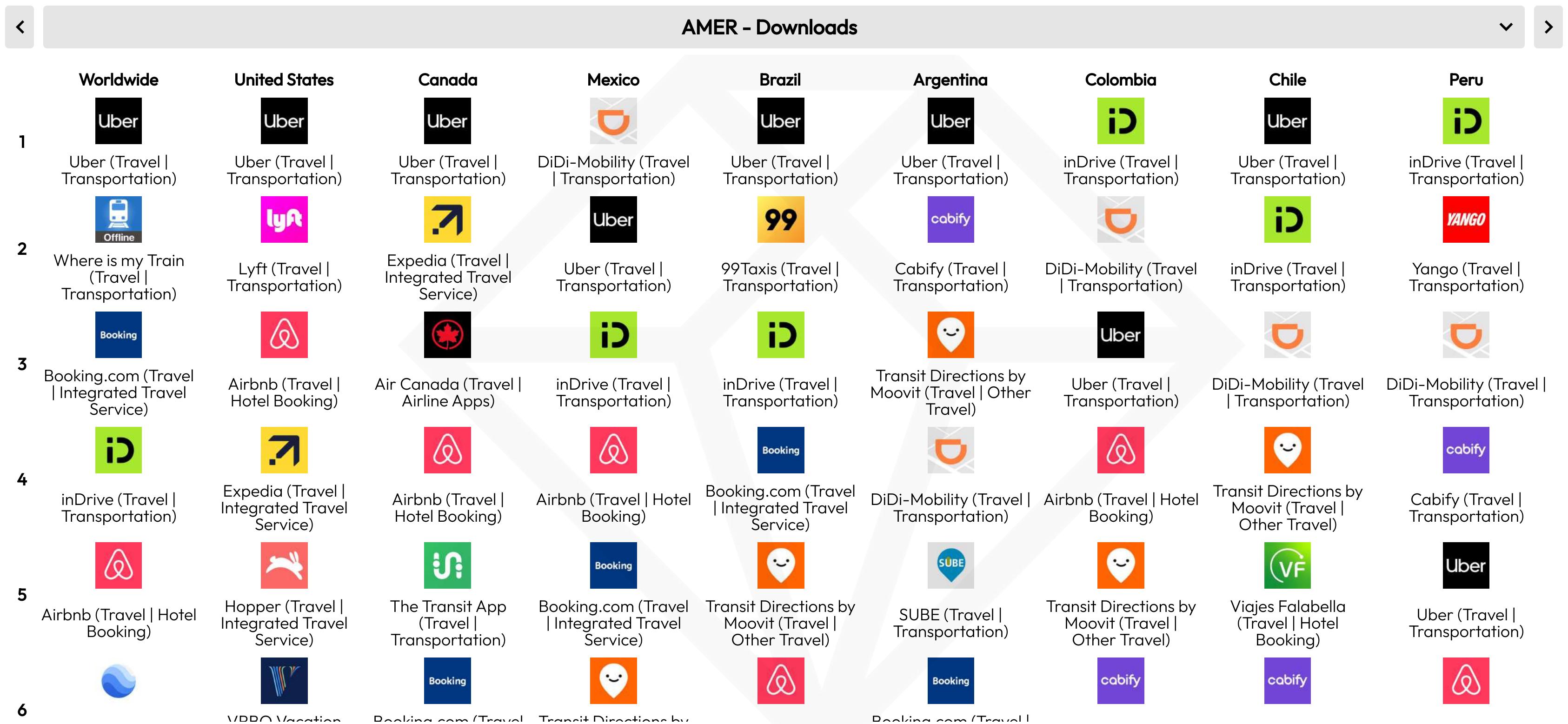


Source: data.ai Intelligence | Note: Downloads across iOS, Google Play; China is iOS only. Sessions on Android Phones only.
Transportation apps are classified using data.ai's App IQ taxonomy.





2023 Rankings by Market | Travel



Source: data.ai Intelligence | Note: Top Apps by yearly Downloads and year-over-year download growth across iOS, Google Play. Travel apps are classified using data.ai's App IQ taxonomy as of Jan 4, 2024.

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



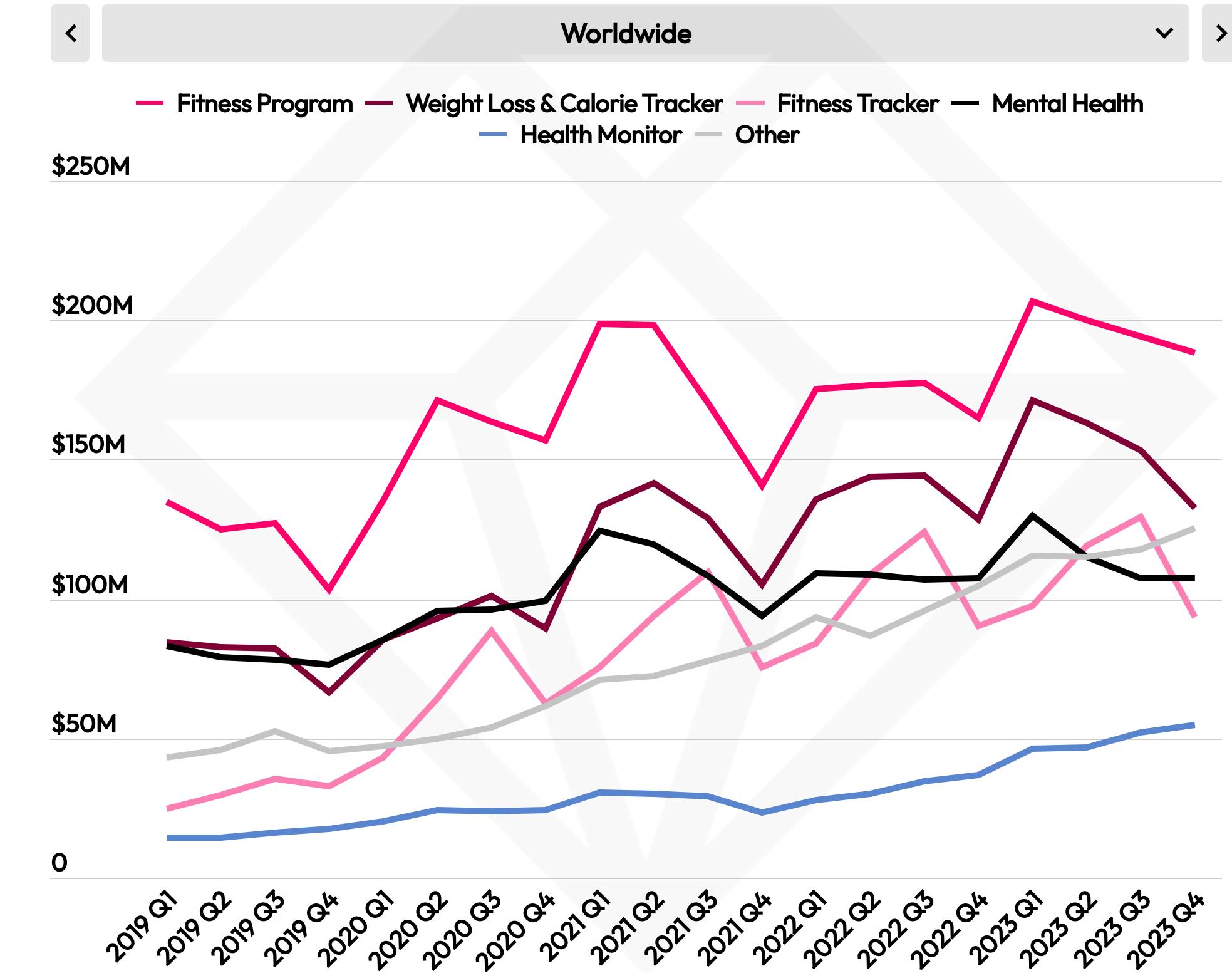
Know Your Market – Health & Fitness Preferences Vary By Market

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](#).

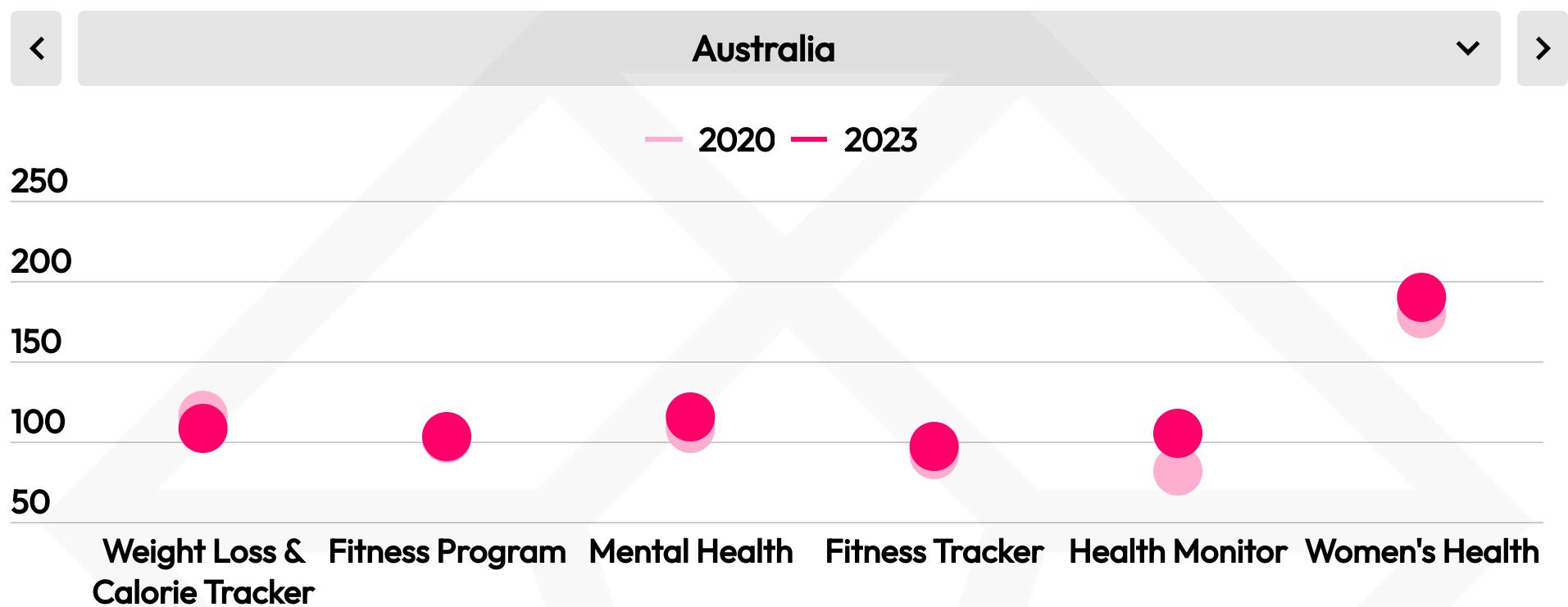
Quarterly Consumer Spend by Health & Fitness Subgenre



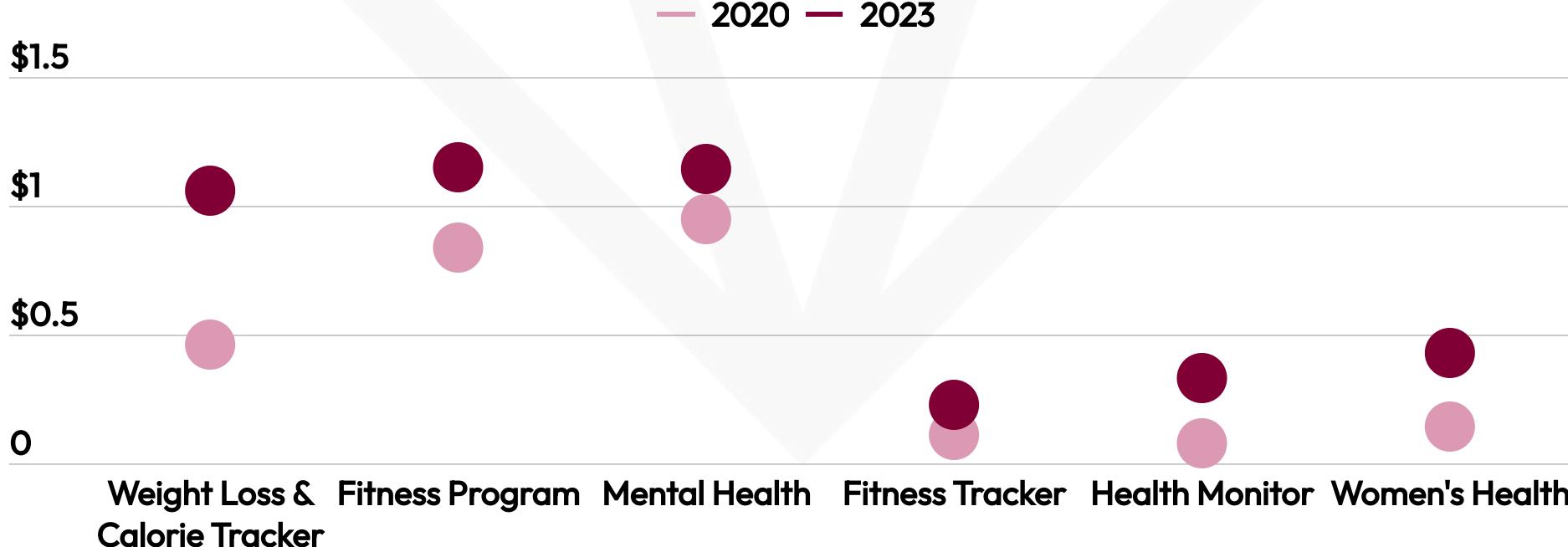
Source: data.ai Intelligence | Note: Consumer Spend across iOS, Google Play; China is iOS only. Spend is gross — inclusive of any percent taken by the app stores. Health & Fitness apps are classified using data.ai's App IQ taxonomy.



Female Usage Index for Health & Fitness Subgenres 2020 vs 2023



Monthly Average Revenue per User for Health & Fitness Subgenres 2020 vs 2023



HEALTH & FITNESS

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

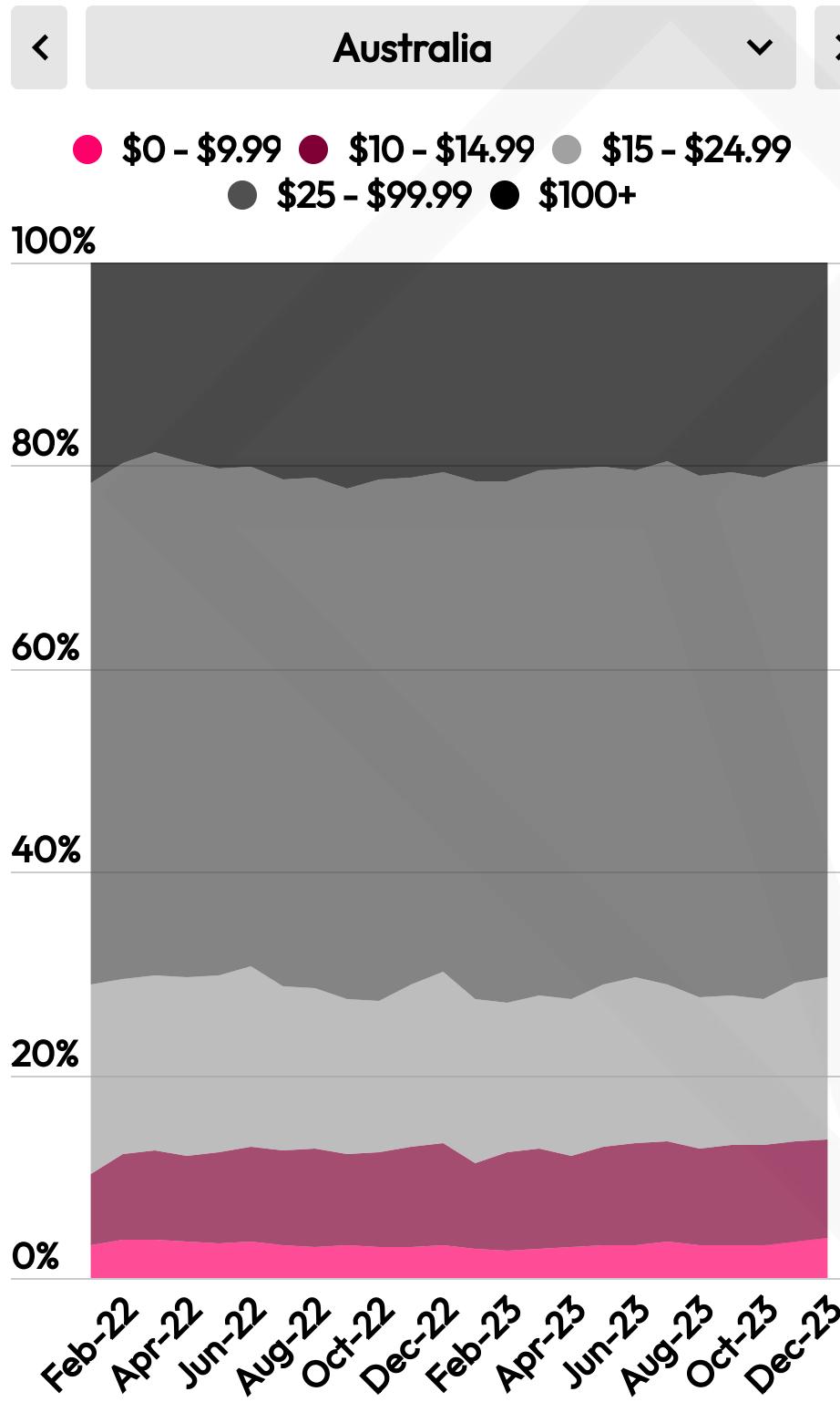
Consumer spend in Health & Fitness apps has surged across all genres since 2020. In the United States, average revenue per user more than doubled in four top subgenres including Weight Loss & Calories Tracker (\$1.13 monthly ARPU in 2023) and Women's Health (\$0.38).

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.

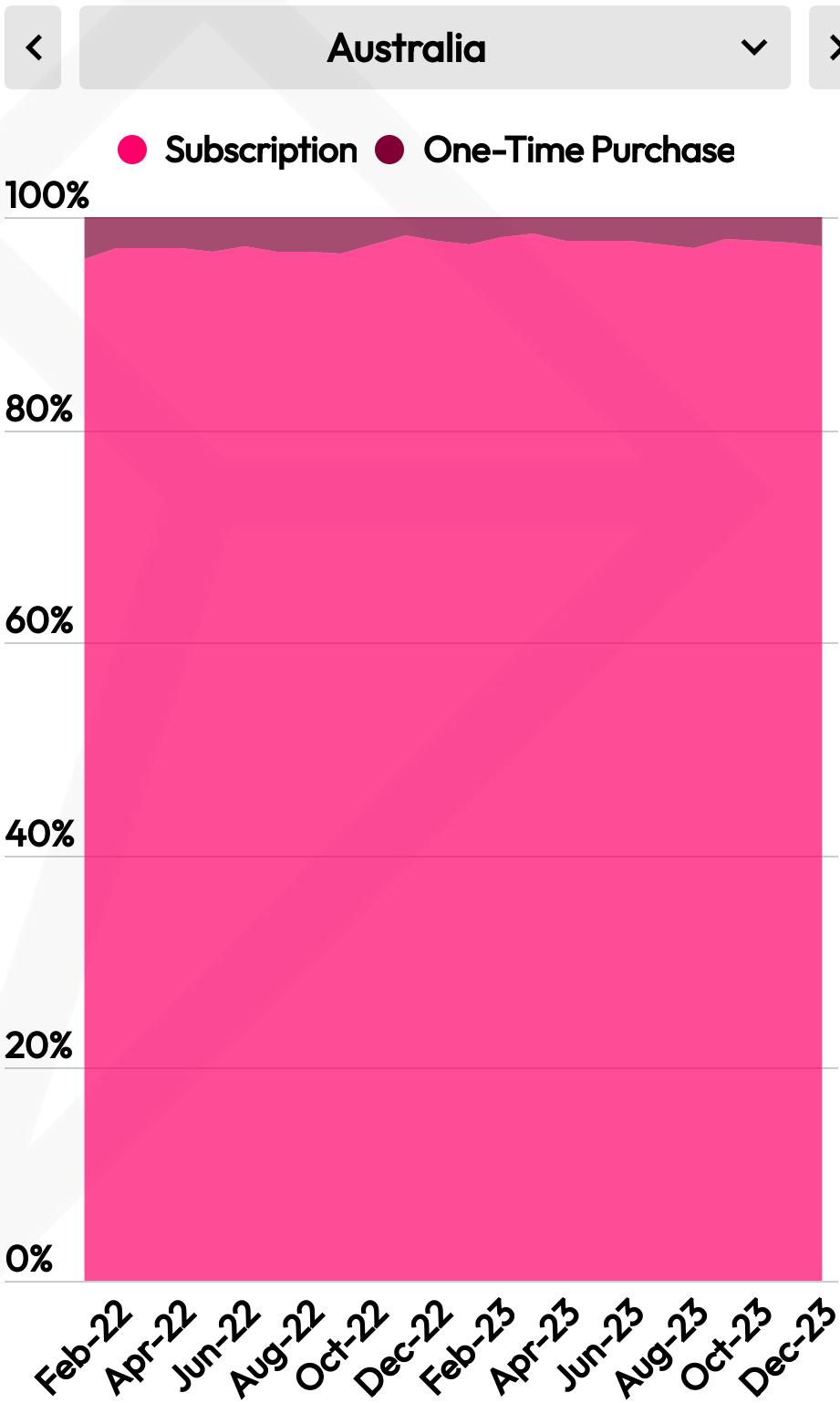
Develop user profiles based on demographics and user behaviors to guide future product improvements



Share of Health & Fitness Consumer Spend by Price on iOS



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



VIDEO STREAMING

Higher Prices and Subscriptions Improve Health & Fitness Monetization

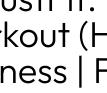
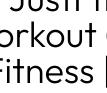
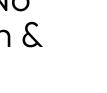
As prices increased across a variety of industries in 2022 and 2023, Health & Fitness apps were no exception. Some of this increase came from raising prices, but others used their product loyalty to push annual subscriptions which improve retention and give apps more certainty about their revenue.

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](#)



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 
1 江苏医保云 (Health & Fitness National Medical Service)  	2 Planet Fitness Workouts (Health & Fitness Fitness Program) 	3 Maple (Health & Fitness Telehealth) 	4 Imss Digital (Health & Fitness Telehealth) 	5 Conecte SUS (Health & Fitness National Medical Service)  	6 Prestadores PAMI (Health & Fitness Telehealth)  
2 FitPro (Health & Fitness Fitness Tracker)  	3 Impulse (Health & Fitness Other Health & Fitness) 	4 Yuka (Health & Fitness Other Health & Fitness) 	5 FitPro (Health & Fitness Fitness Tracker)  	6 FitPro (Health & Fitness Fitness Tracker)  	7 Flo by Flo Health (Health & Fitness Women's Health)  
3 Flo by Flo Health (Health & Fitness Women's Health)  	4 MyChart (Health & Fitness Telehealth)  	5 Impulse (Health & Fitness Other Health & Fitness) 	6 Flo by Flo Health (Health & Fitness Women's Health)  	7 Flo by Flo Health (Health & Fitness Women's Health)  	8 Feelsy (Health & Fitness Mental Health)  
4 Home Workout - No Equipments (Health & Fitness Fitness Program)  	5 Yuka (Health & Fitness Other Health & Fitness)  	6 AllTrails (Health & Fitness Fitness Tracker) 	7 Home Workout - No Equipments (Health & Fitness Fitness Program)  	8 Home Workout - No Equipments (Health & Fitness Fitness Program)  	9 FitPro (Health & Fitness Fitness Tracker)  
5 Da Fit (Health & Fitness Health Monitor)  	6 JustFit: Lazy Workout (Health & Fitness Fitness)  	7 JustFit: Lazy Workout (Health & Fitness Fitness) 	8 Da Fit (Health & Fitness Health Monitor)  	9 Consulta Auxílios Completo (Health & Fitness National Health Service)  	10 Impulse (Health & Fitness Other Health & Fitness)  

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

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.



Gympass

asics

DREAM11

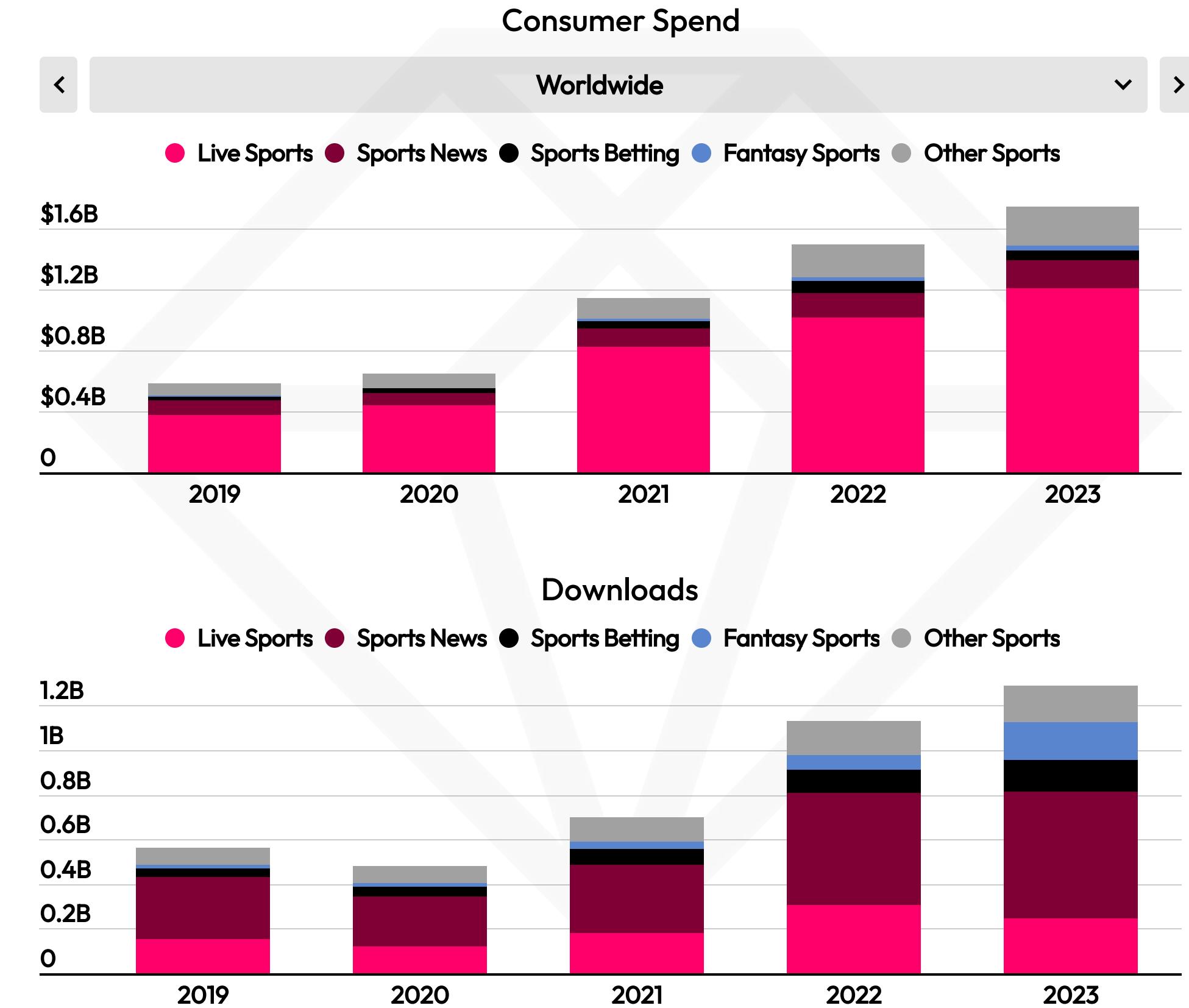
A Win for Sports Apps as Huge Growth Continues in 2023

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

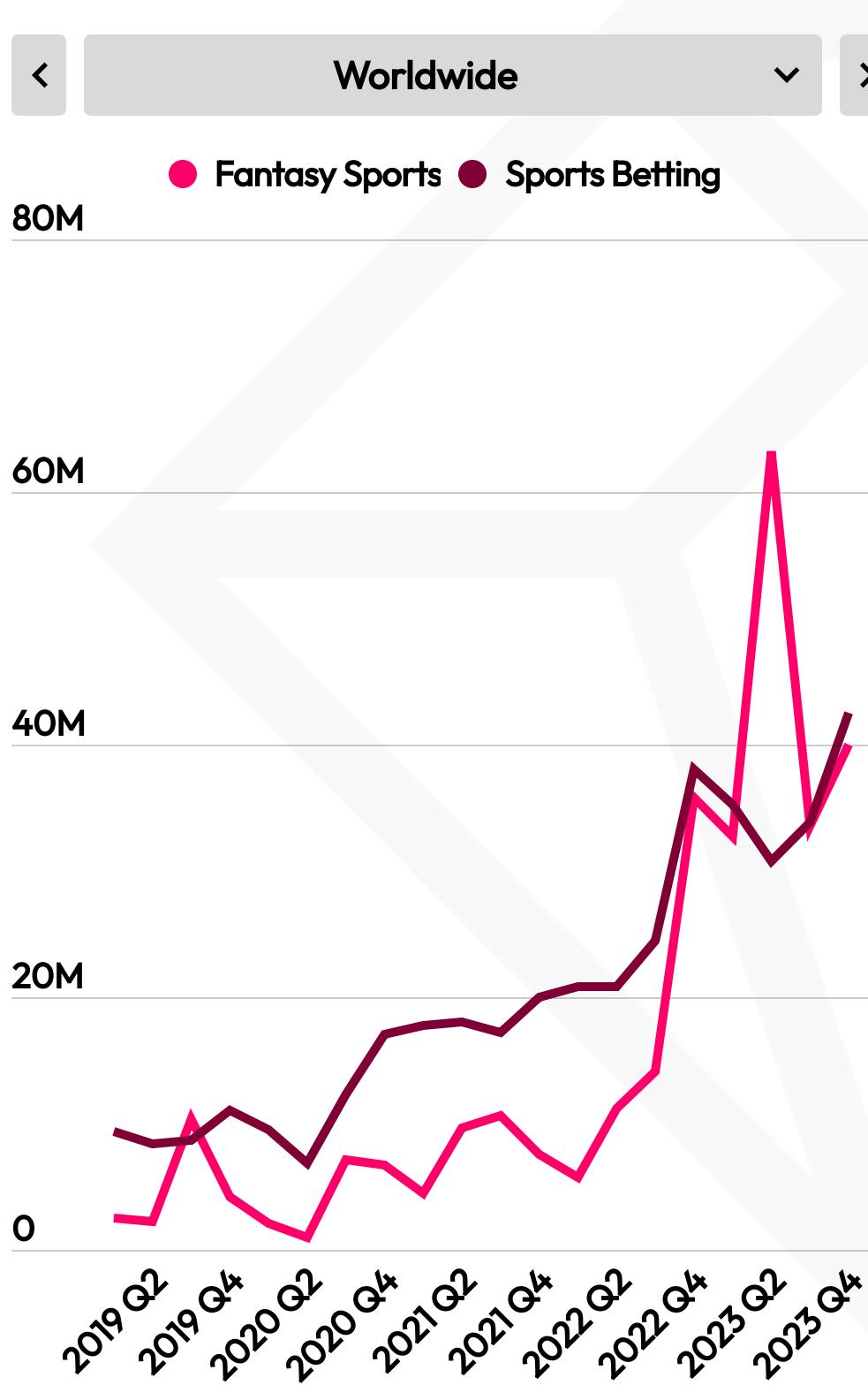


Source: data.ai Intelligence | Note: Consumer Spend and Downloads across iOS, Google Play; China is iOS only. Spend is gross — inclusive of any percent taken by the app stores. Sports apps are classified using data.ai's App IQ taxonomy.





Fantasy Sports vs Sports Betting Downloads by Country



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

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.

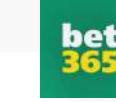
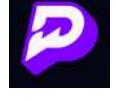
Fantasy Sports apps peak in the US at the start of National Football League season, while Sports Betting is highest in Q1 with March Madness and the Super Bowl as marquee events.

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 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						
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)
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)
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)
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)
5						
	FlashScore (Sports Sports News)	PrizePicks (Sports Fantasy Sports)	TeamSnap (Sports Other Sports)	TUDN (Sports Live Sports)	Onefootball (Sports Sports News)	Futbolero plus (Sports Sports News)
						

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

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

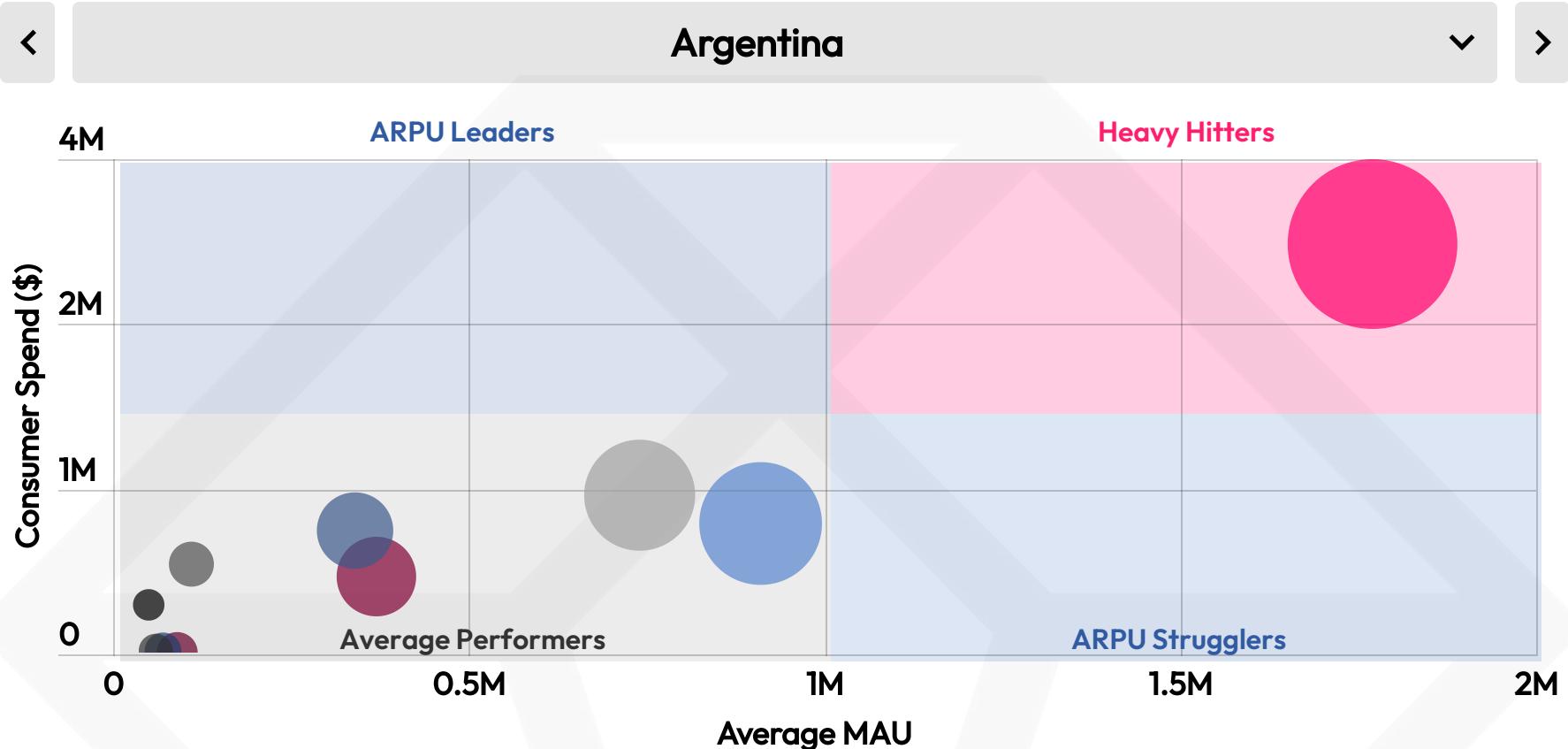
Manager Chief Engineer

Foundation Development of Customer Understanding Department
Data-driven Solution Development Division

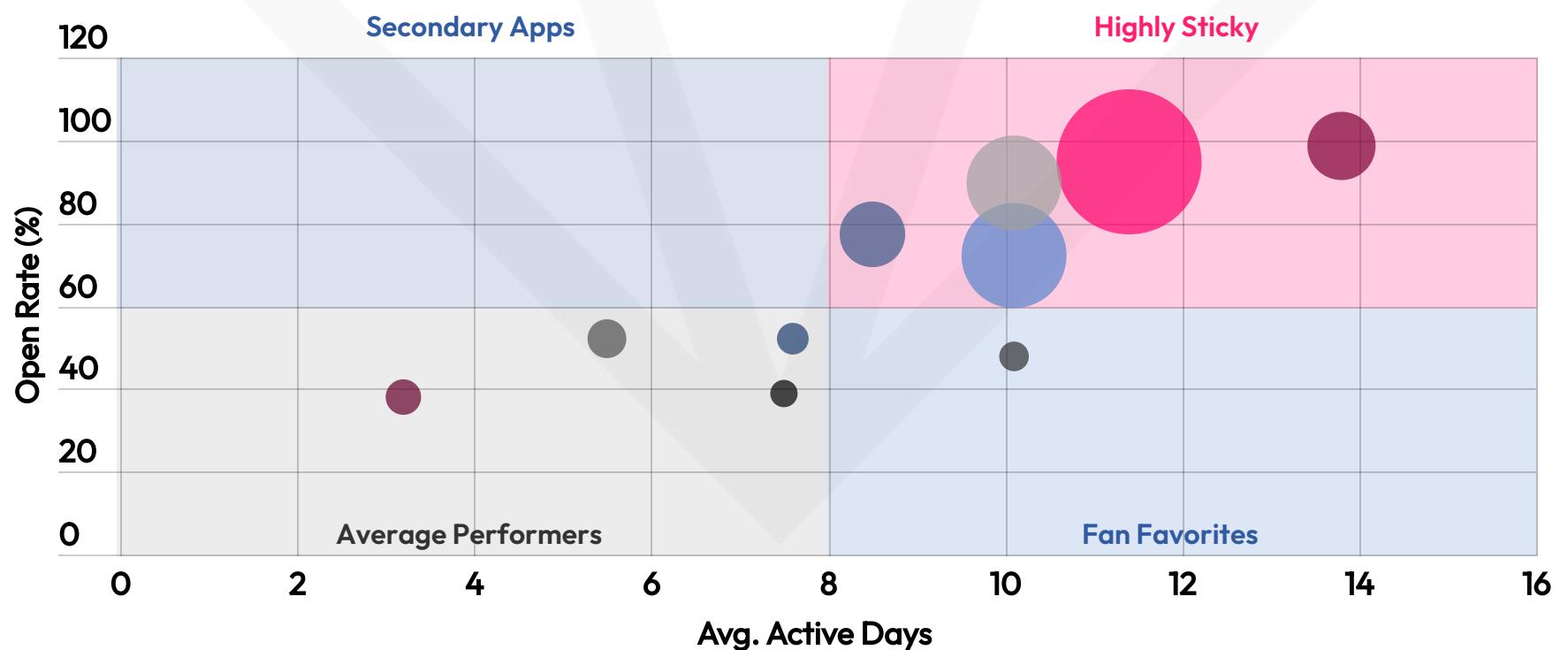
HONDA



User Monetization: Consumer Spend vs. Average MAU in 2023



Usage Stickiness: Open Rate vs. Average Active Days in 2023



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

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 - Consumer Spend				EMEA - Downloads			EMEA - Consumer Spend		
	Worldwide	United States	Canada	Mexico	Brazil	Argentina	Colombia	Chile	Peru	Badoo	Tinder	Soul – 跟灵魂找到你	Tinder	With	Glamour – Live calling anytime	Hinge	Omi	Bumble App	
1																			
2																			
3																			
4																			
5																			

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.



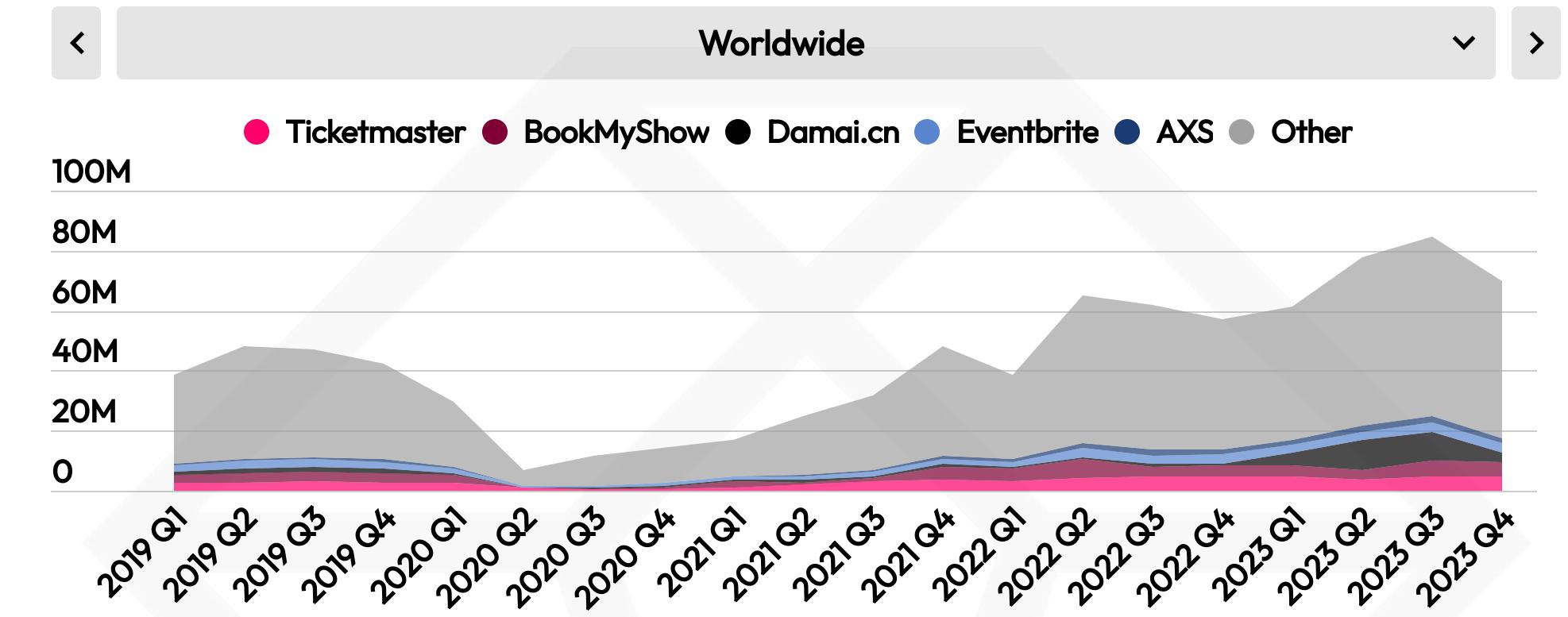
Ticketing Apps in Higher Demand Than Ever as Consumers Flock to In-Person Events

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.

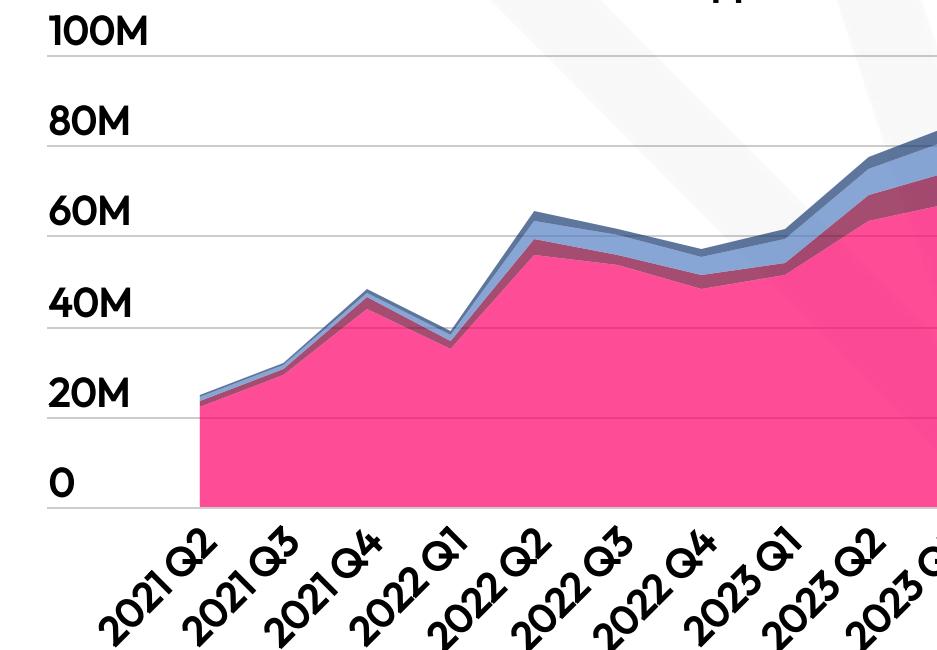
Keep up with the latest [advertising strategies](#) in an increasingly competitive space

Ticket Service Quarterly App Downloads



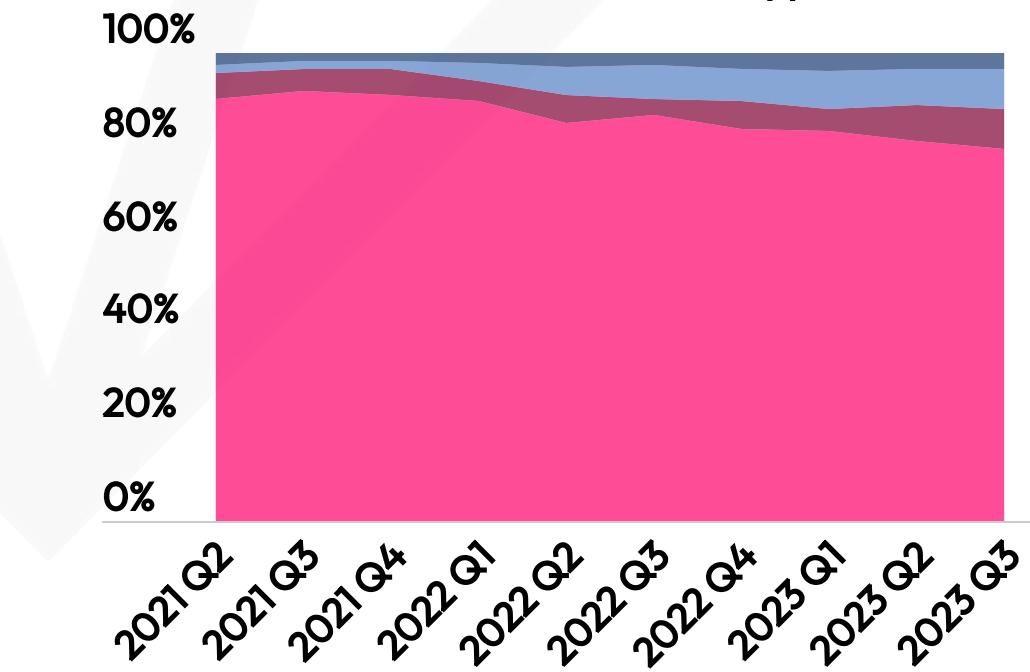
Download Channel Since 2021 Q2

- Organic Search
- Paid Search
- Organic Featured
- Paid In-App Ads



Share by Download Channel

- Organic Search
- Paid Search
- Organic Featured
- 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



2023 Rankings by Market | Top Apps



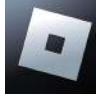
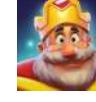
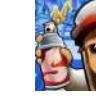
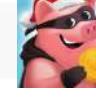
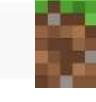
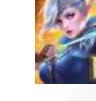
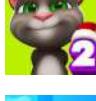
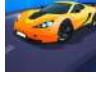
Worldwide

DOWNLOADS			CONSUMER SPEND			MONTHLY ACTIVE USERS		
1	 TikTok	Entertainment Short Videos	1	 TikTok	Entertainment Short Videos	1	 Facebook	Social Media Social Networks
2	 Instagram	Social Media Media Sharing Networks	2	 YouTube	Entertainment Video Sharing	2	 WhatsApp Messenger	Social Media Communication
3	 Facebook	Social Media Social Networks	3	 Disney+	Entertainment OTT	3	 Instagram	Social Media Media Sharing Networks
4	 WhatsApp Messenger	Social Media Communication	4	 Tinder	Social Media Dating	4	 Facebook Messenger	Social Media Communication
5	 CapCut	Photo & Video Video Editing	5	 Google One	Utility & Productivity File Management	5	 TikTok	Entertainment Short Videos
6	 Telegram	Social Media Communication	6	 Max: Stream HBO, TV, & Movies	Entertainment OTT	6	 Telegram	Social Media Communication
7	 Snapchat	Social Media Media Sharing Networks	7	 piccoma	Books & Reference Comics	7	 Amazon	Shopping E-Commerce
8	 WhatsApp Business	Business Business Communication	8	 Bumble App	Social Media Dating	8	 Spotify	Entertainment Music & Audio
9	 Facebook Messenger	Social Media Communication	9	 LinkedIn	Business Integrated Career Platform	9	 X	Social Media MicroBlogging
10	 Threads	Social Media MicroBlogging	10	 Audible	Books & Reference Audio Books	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.



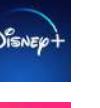
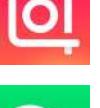
2023 Rankings by Market | Top Games

Worldwide											
DOWNLOADS		CONSUMER SPEND		MONTHLY ACTIVE USERS							
1		Subway Surfers	Action Runner	1		Candy Crush Saga	Match M3	1		ROBLOX	Simulation Creative Sandbox
2		Free Fire	Shooting Battle Royale	2		Honor of Kings	Action MOBA	2		Free Fire	Shooting Battle Royale
3		ROBLOX	Simulation Creative Sandbox	3		ROBLOX	Simulation Creative Sandbox	3		Candy Crush Saga	Match M3
4		Ludo King	Tabletop Ludo	4		Royal Match	Match M3-Meta	4		Subway Surfers	Action Runner
5		Candy Crush Saga	Match M3	5		Coin Master	Party Luck Battle	5		Minecraft Pocket Edition	Simulation Creative Sandbox
6		Royal Match	Match M3-Meta	6		Genshin Impact	RPG Open World RPG	6		Mobile Legends: Bang Bang	Action MOBA
7		Block Blast Adventure Master	Puzzle Tile-Matching	7		Gardenscapes by Playrix	Match M3-Meta	7		Ludo King	Tabletop Ludo
8		8 Ball Pool	Sports Simulation Sports	8		Monopoly GO: Family Board Game	Party Luck Battle	8		Stumble Guys	Party Party Royale
9		My Talking Tom 2	Simulation Pet	9		Pokémon GO	RPG Location RPG	9		EA SPORTS FC™ MOBILE 24 SOCCER	Sports Simulation Sports
10		Race Master	Hypercasual Racing	10		Game For Peace	Shooting Battle Royale	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.



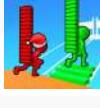
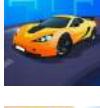
2023 Rankings by Market | Top Companies - Apps

Worldwide									
DOWNLOADS			CONSUMER SPEND						
	Company	HQ	Top Apps by Downloads		Company	HQ	Top Apps by Consumer Spend		
1	Meta	United States		Instagram	1	Google		YouTube	
2	Google	United States		YouTube	2	ByteDance		TikTok	
3	ByteDance	China		TikTok	3	Disney		Disney+	
4	Microsoft	United States		Microsoft Teams	4	Match Group		Tinder	
5	Alibaba Group	China		Alibaba.com	5	Warner Bros. Discovery		Max: Stream HBO, TV, & Movies	
6	Amazon	United States		Amazon	6	Amazon		Audible	
7	InShot Inc	China		InShot	7	Tencent		Tencent Video	
8	Tencent	China		WeChat	8	Microsoft		LinkedIn	
9	ABISHKKING	Hong Kong		Home Workout - No Equipments	9	Kakao piccoma Corp		piccoma	
10	Walmart	United States		PhonePe	10	Bumble		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			CONSUMER SPEND		Top Apps				
	Company	HQ	Top Apps by Downloads		Company	HQ	Top Apps by Consumer Spend		
1	Azur Interactive Games	Cyprus		WormsZone.io	1	Tencent	China		Honor of Kings
2	Tencent	China		Subway Surfers	2	Activision Blizzard	United States		Candy Crush Saga
3	OneSoft	Vietnam		1945 Air Forces	3	Playrix	Ireland		Gardenscapes by Playrix
4	Unity Technologies	United States		Bridge Race	4	miHoYo	China		Genshin Impact
5	SayGames	Cyprus		Race Master	5	NetEase	China		Eggy Party
6	Embracer Group	Sweden		Phone Case DIY	6	Take Two Interactive	United States		Empires & Puzzles
7	BabyBus	China		Ice Cream Bar Factory	7	Playtika	Israel		BINGO Blitz
8	Take Two Interactive	United States		Parking Jam 3D	8	Netmarble	South Korea		Marvel Contest of Champions
9	Voodoo	France		Mob Control	9	Moon Active	Israel		Coin Master
10	Jinke Culture - Outfit7	China		My Talking Tom 2	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

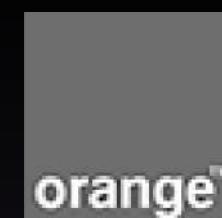
"In the dynamic world of mobile gaming, SciPlay's rise epitomizes agility, strategic focus, and player-centricity. In 2023, we achieved elevated ARPPU, robust retention and impressive player-to-payer conversion, all attained by fine tuning our products and tailoring marketing campaigns to better align 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



"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



Disclaimer

data.ai is a mobile market estimate service provider. data.ai is not registered in any investment advisory capacity in any jurisdiction globally, and does not offer any legal, financial, investment or business advice. Nothing contained in this communication, or in any data.ai products, services or other offerings, should be construed as an offer, recommendation, or solicitation to buy or sell any security or investment, or to make any investment decisions. Any reference to past or potential performance is not, and should not, be construed as a recommendation or as a guarantee of any specific outcome. You should always consult your own professional legal, financial, investment and business advisors.

[View Report Methodology](#)



On-the-Go Insights

We have an app for that:

Pulse by data.ai





Request a Demo

data.ai