Sensor Tower Report

TikTok Edition

State of Mobile 2025

From trends to traction - how to win on mobile in 2025 and beyond

Sensor Tower × TikTok

The rules of mobile growth are being rewritten.

In 2025, success isn't just about downloads or installs, it's about recognizing behavioral signals, unlocking new audiences, and turning moments into momentum. Mobile is now the most competitive it's ever been. But it's also more open than ever, with emerging markets surging, new monetization models proving their worth, and full-funnel strategies redefining how brands think about growth.

This report, built by **Sensor Tower's market intelligence** and **TikTok's cultural insight** — brings together hard data and human behavior shaping the future of mobile. We spotlight how brands are winning in markets once considered closed, how "Q5" isn't a month but a mindset, and why communities are quietly becoming the new retention engine.

If you're building an app today, this report isn't just a look at where we are. It's a blueprint for where to go next.

Executive Summary | Key Takeaways

01

AI is everywhere on mobile.

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

02

Mobile apps embrace the power of communities.

Top apps from Health & Fitness to Dating look to connect people with similar interests, both digitally and in person.

03

Connecting mobile to in-person amid digital fatigue

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

04

Going global: competition spans across regions.

Short drama is an example area of global competition with recent launches expanding outside of the United States.

Executive Summary | Mobile Landscape at a Glance

New App Downloads

136
Billion

-1.0%
YoY Growth

iOS & Google Play

258,000 apps
downloaded per minute in 2024

In-App Purchase (IAP) Revenue

$150
Billion

+12.5%
YoY Growth

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

$285,000 spent
per minute in 2024

Total Hours Spent

4.2
Trillion

+5.8%
YoY Growth

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

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

Average Time Spent per User

3.5
Hours per Day

+2.9%
YoY Growth

iOS & Android Across 60+ Markets (Excludes China)

>13 minutes
per waking hour

of Apps Used per User

26
Per Month

+9.2%
YoY Growth

iOS & Android Across 60+ Markets (Excludes China)

7 unique apps
used each day per user on average

Contents

About this data:
Methodology at a Glance

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

Downloads of the same app by the same user to multiple devices, updates, or re-installs of the same app by the same user are not counted towards the total.

Figures cited in this report reflect iOS App Store and Google Play download and revenue estimates for January 1, 2014 through December 31, 2024.

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

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

In-app purchase (IAP) revenue estimates are gross — inclusive of any percent taken by the app stores. Revenue includes paid downloads, in-app purchases, and subscriptions from the iOS App Store and Google Play. This does not include any revenue from advertisements or third-party purchases.

View Detailed Report Methodology Here.

01

Macro Mobile Trends

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

IAP Revenue Soars in Most Markets as Europe Sees Rapid Growth

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

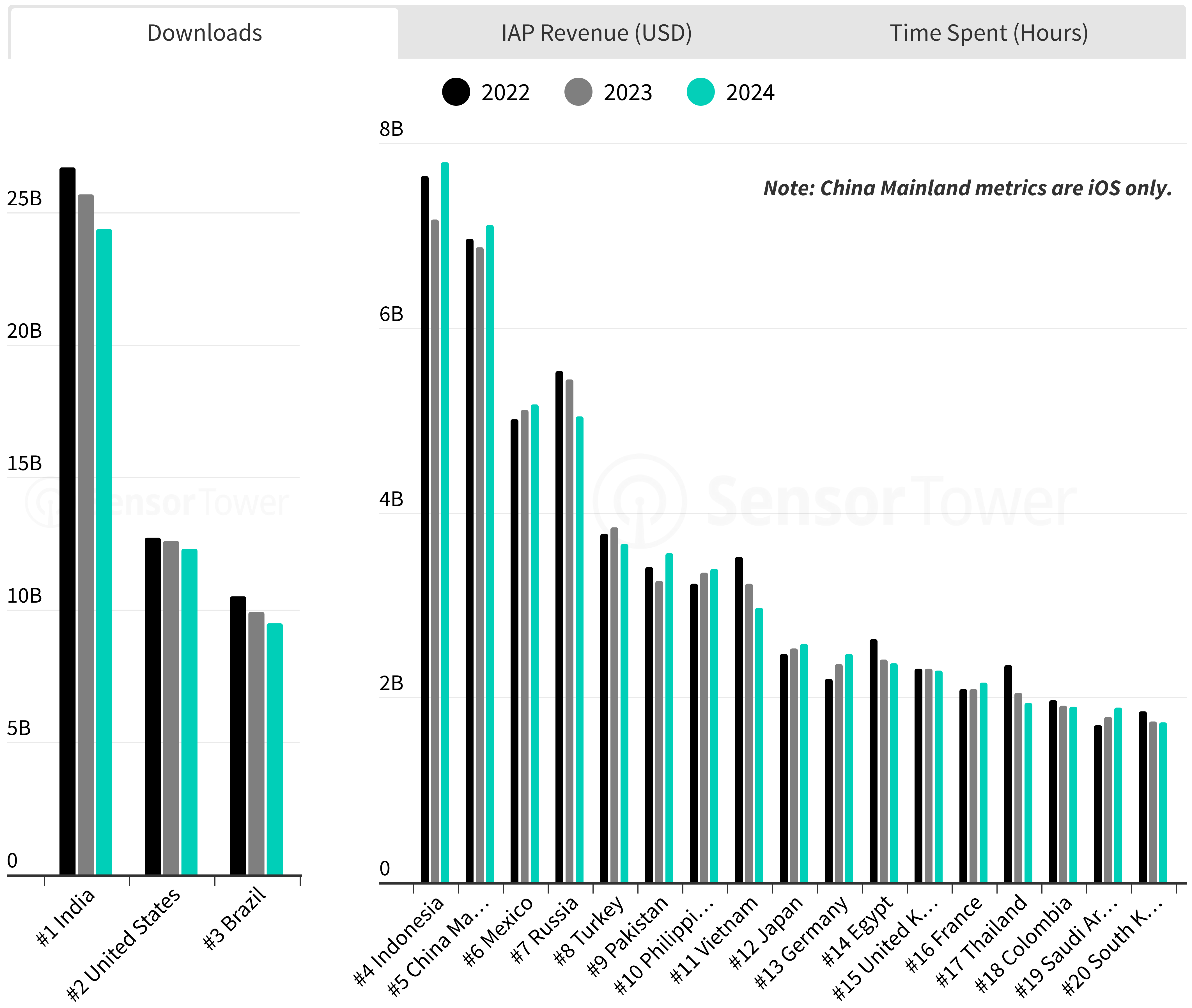
What has helped create this revenue boom on mobile? Consumers are spending more time than ever on their mobile devices and are becoming increasingly comfortable making purchases on them. Time spent climbed in most markets, though it has leveled out in a few like the US and Japan.

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

Want to See the Latest App Trends in Your Market?
Request a demo to see Sensor Tower's latest offerings covering 90+ different countries.

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

Top 20 Mobile Markets in 2024



Will Consumers Soon Spend More in Apps Than Games?

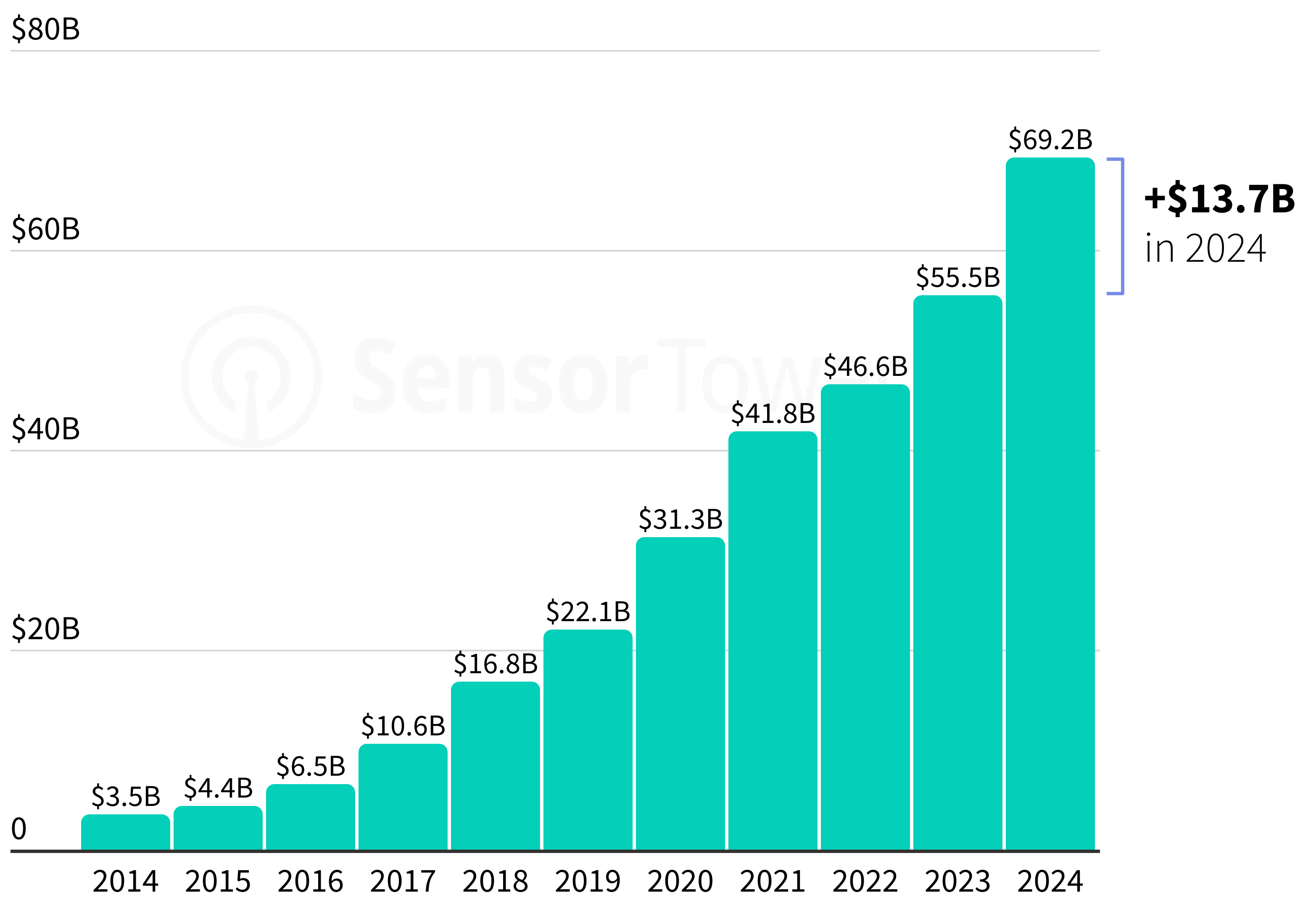
IAP revenue on mobile outside of mobile gaming has skyrocketed during the past 10 years, climbing from $3.5 billion in 2014 to more than $69 billion in 2024. And this growth is only accelerating — apps gained nearly $14 billion in additional IAP revenue in 2024 alone (+25% YoY), well above the nearly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

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

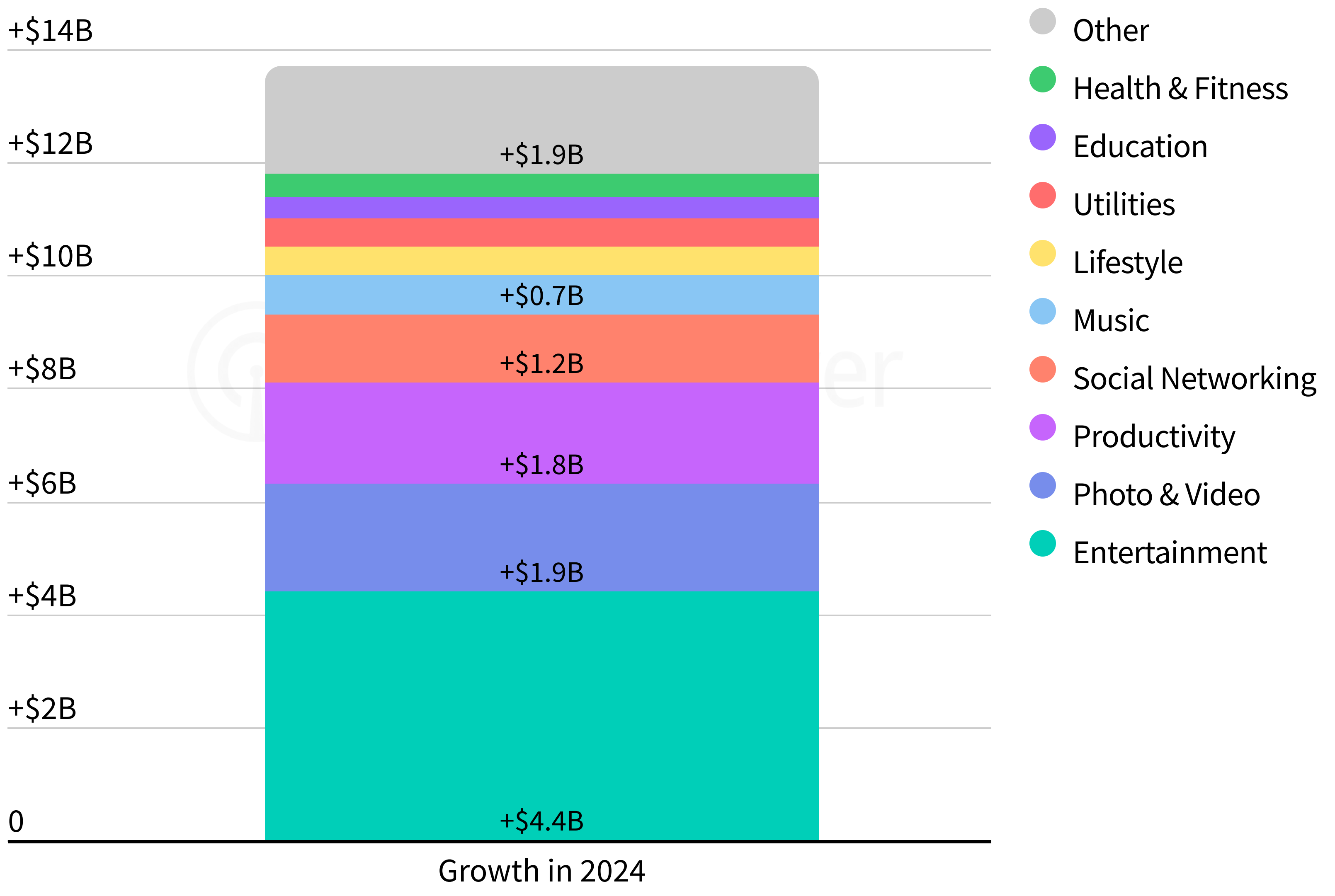
Don't Want to Wait for the Next Year's Report?
Look out for Sensor Tower's Digital Market Index report published every quarter, covering the latest trends across mobile, digital advertising, and retail media.

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

Yearly Worldwide App IAP Revenue
Excluding Mobile Games, 2014 - 2024



Worldwide IAP Revenue Growth by App Category
2024 vs. 2023

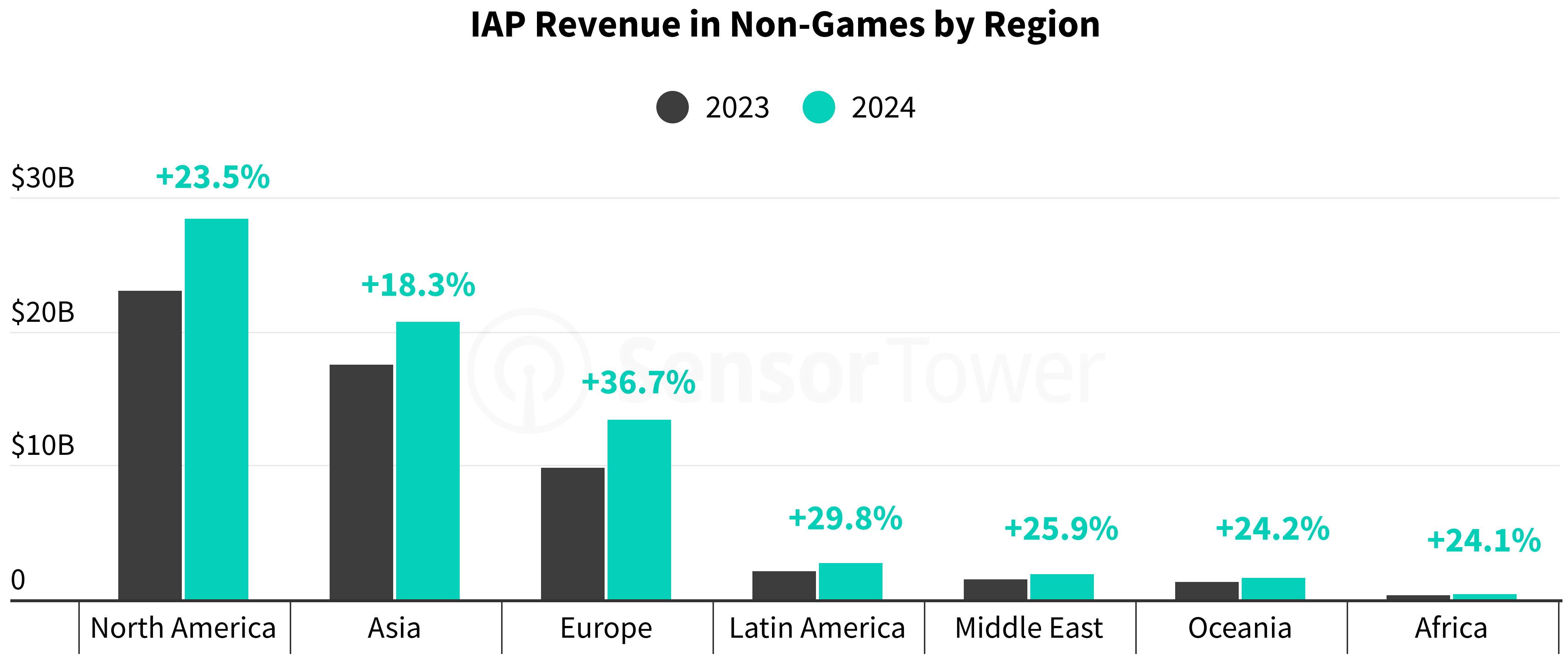


State of Mobile 2025 | TikTok Edition

Apps Saw Strong Growth Across Regions — With Europe Leading the Way

Every region saw at least 20% year-over-year growth for non-game IAP revenue except for Asia, which fell just shy of the mark. Non-games had particularly strong growth in Europe, combining for nearly 37% YoY growth in the region. This included rapid growth across top countries like the UK, Germany, and France.

While growth was strong across the globe, the top three regions still took the bulk of the IAP revenue. In total, North America added an additional $5.4 billion in non-game IAP revenue in 2024 compared to 2023. Europe ranked second at $3.6 billion, while Asia was third at $3.2 billion. The remaining four regions combined to add $1.4 billion in YoY growth.



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

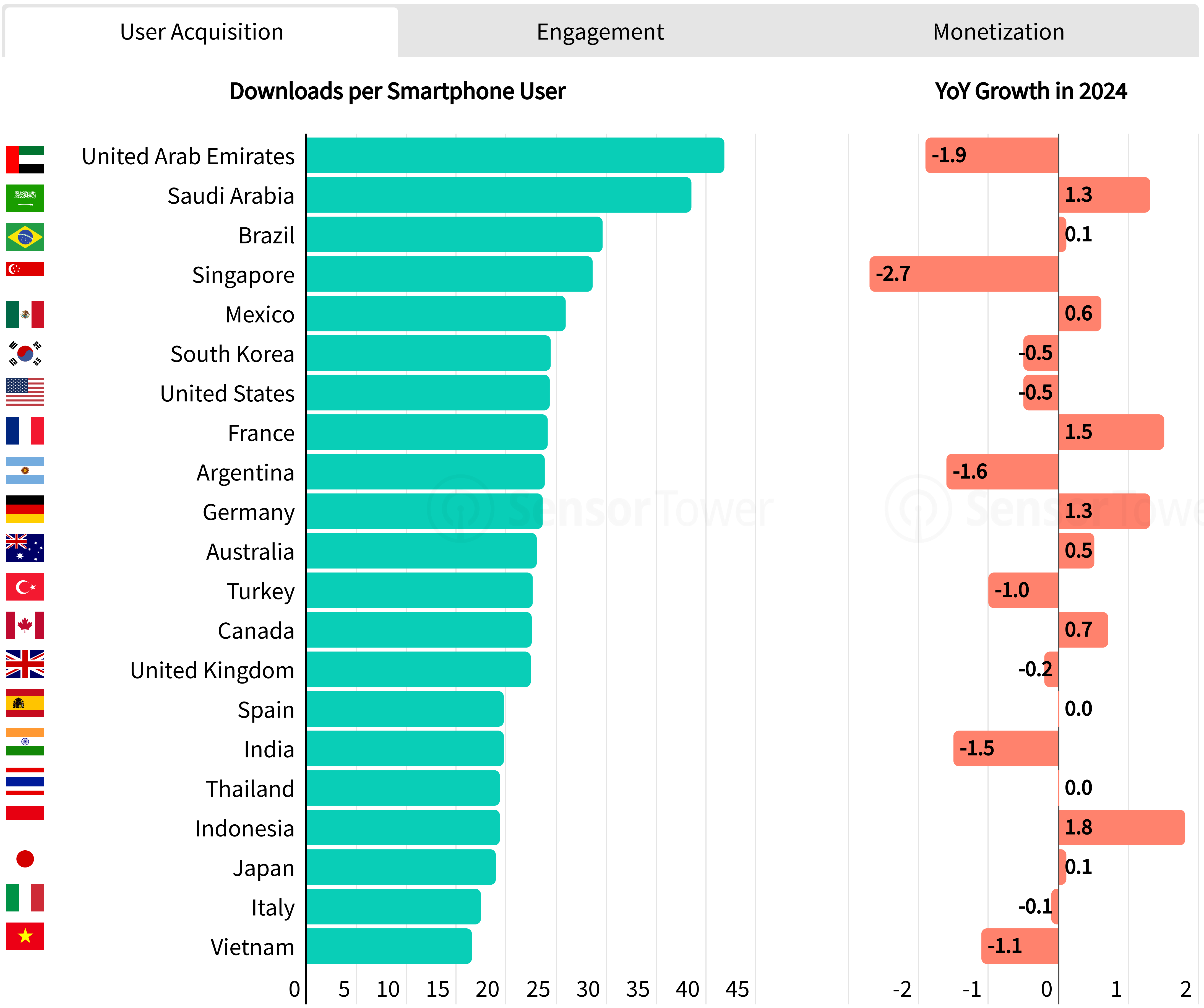
Discover the Leading Mobile Markets in 2024 — and Which are Breaking Out

Controlling for the number of active smartphone users per market, top countries in the Middle East and Latin America had the highest rate of new downloads in 2024. Smartphone users in the UAE downloaded more than 40 apps per user in 2024, followed by 38 app downloads per user in Saudi Arabia and 30 in Brazil. Meanwhile, Indonesia, France, Saudi Arabia, and Germany were the markets where downloads were accelerating the most year-over-year.

Indonesia, India, and Thailand led the way by average time spent per user in 2024, with India also achieving the fastest growth. Markets in western Europe, North America, and Oceania tend to have lower time spent on mobile on average.

The United States remained the leader in mobile monetization with more than $80 spent per year on in-app purchases per user. It also had the highest YoY growth (+$14 per user). The UAE and Australia both gained more than $10 in additional average monthly IAP revenue per user YoY.

Non-Game App Performance by Market



Source: Sensor Tower
Note: iOS and Google Play combined. Revenue is gross — inclusive of any percent taken by the app stores. Metrics are adjusted by the estimated number of smartphone users in each market.

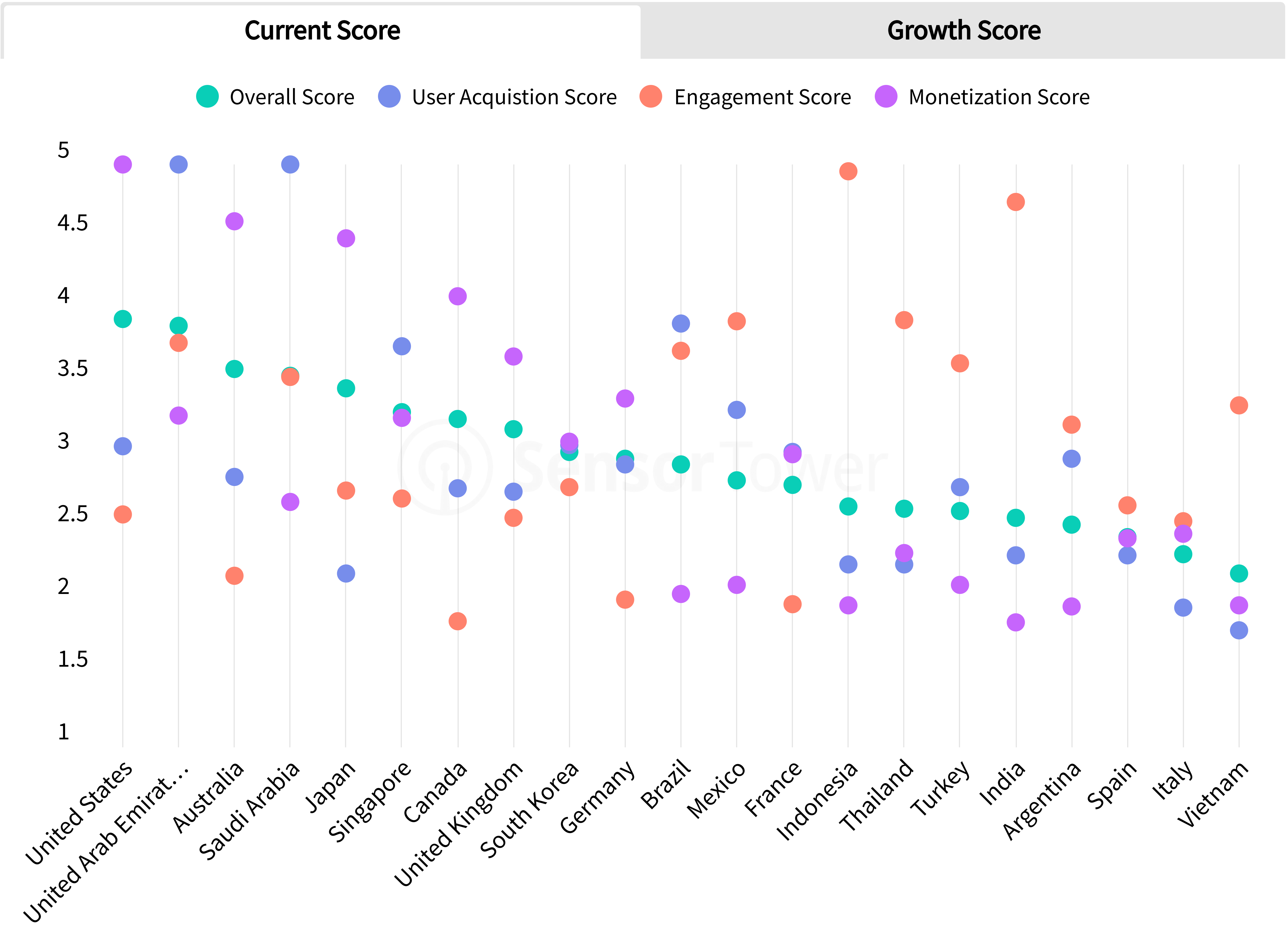
The United States Ranks as the Top Mobile Market for Non-Games While Germany Leads Growth

Sensor Tower's market scores rank each market based on their relative per user monetization, engagement, and user acquisition rates. The US, Australia, and Japan each ranked among the top five markets, driven by high monetization, while strong user acquisition scores propelled the UAE and Saudi Arabia to #2 and #4, respectively.

Germany tops the included markets by growth score in 2024 with strong revenue and download growth. Australia, the US, France, Canada, and the UK also continued to provide huge growth potential for non-games. Japan was a notable market where growth lagged due to weakening economic conditions in the country.

Non-Game App Market Scores

Scores Between 1-5 Based on Relative App Performance in Each Market



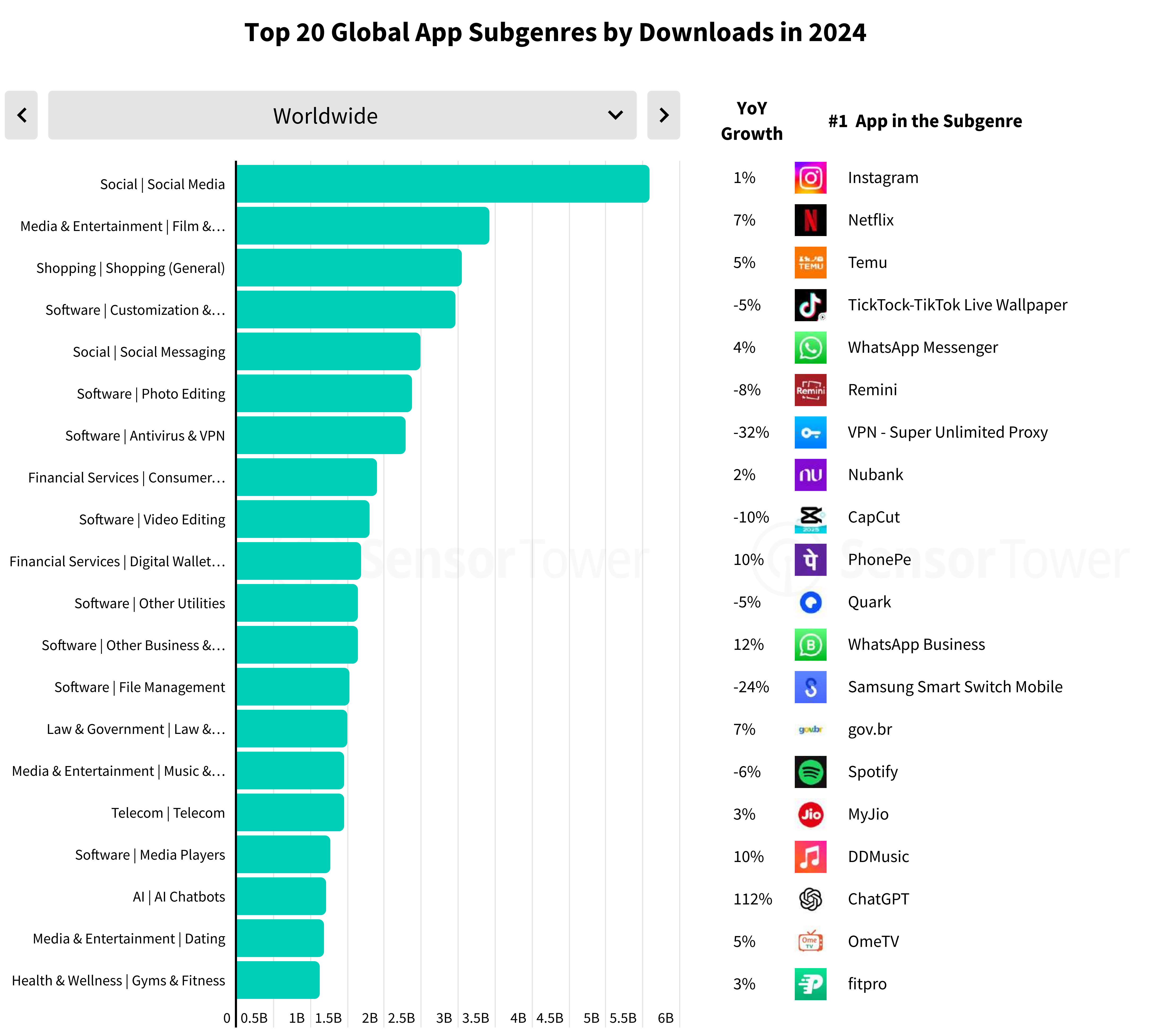
Source: Sensor Tower
Note: iOS and Google Play combined. All country-level figures are normalized by estimates for the number of smartphones in each country. Input variables include downloads per smartphone user (user acquisition), time spent per smartphone user (engagement), and IAP revenue per smartphone user (monetization). Scores are calculated using Z-scores for each metric across the included countries, and rescaled so that scores are between 1 and 5, with a mean of 3. Overall scores are calculated as the weighted average of the three scores (50% monetization, 30% user acquisition, and 20% engagement).

Core App Categories Achieve Positive Download Growth in 2024

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

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

Dive Deeper with Sensor Tower's Top Apps
Identify the top performing apps across any country and any app store category. Or, try Sensor Tower's detailed app taxonomy, including more than 180 different classifications for non-game apps. Sensor Tower customers can try the link here.



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

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

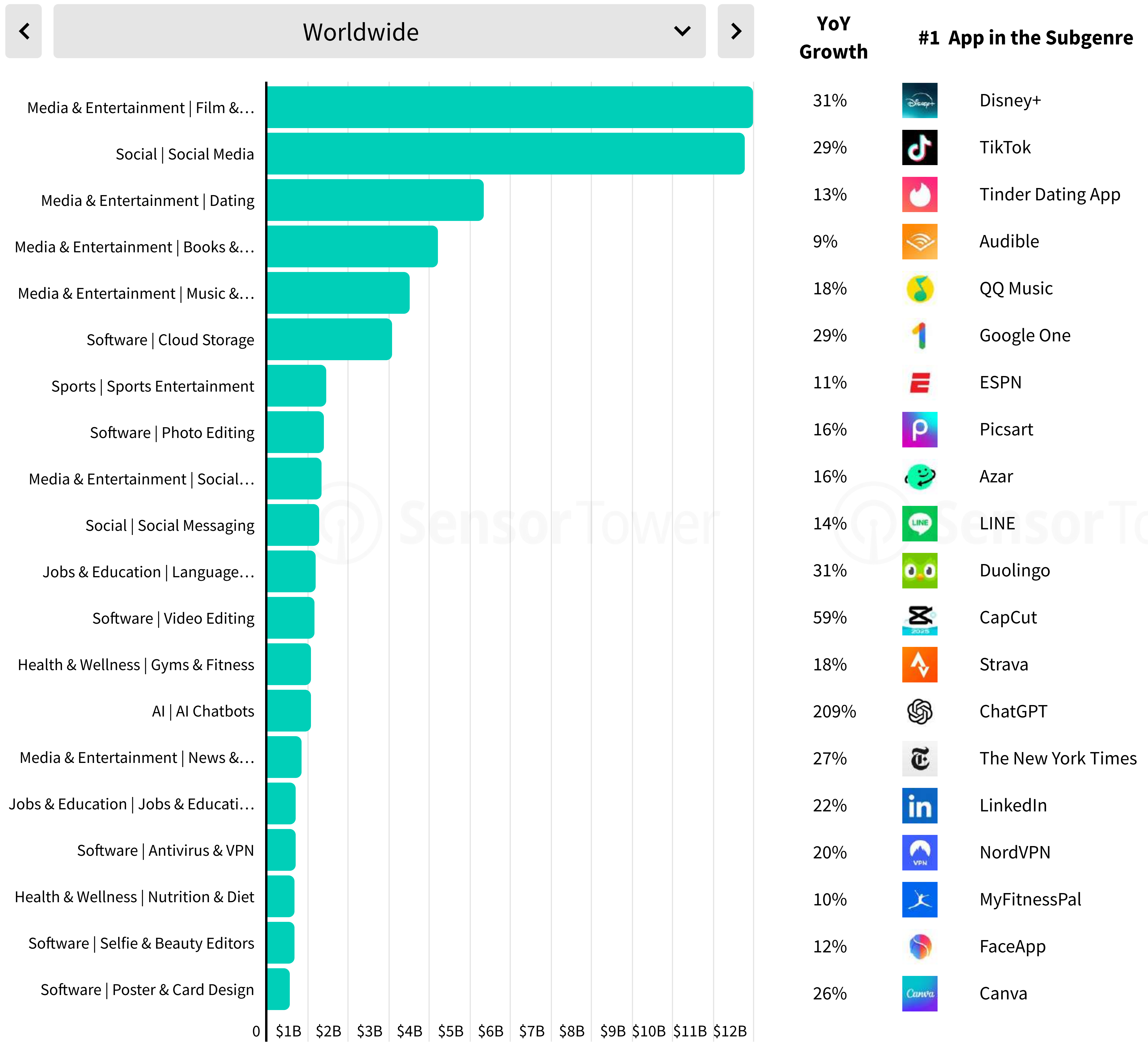
Film & Television Streaming and Social Media were the top two subgenres by IAP revenue in 2024 by a wide margin, and both saw rapid growth across the globe. However, the two have taken different paths to becoming the leading subgenres on mobile. Streaming apps tend to monetize through subscriptions,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

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

TikTok's Record-Breaking Ascent
Check out our blog post studying how TikTok became the first non-game to reach $15 billion in global consumer spend and how it stacks up all-time.

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

Top 20 Global App Subgenres by IAP Revenue in 2024



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

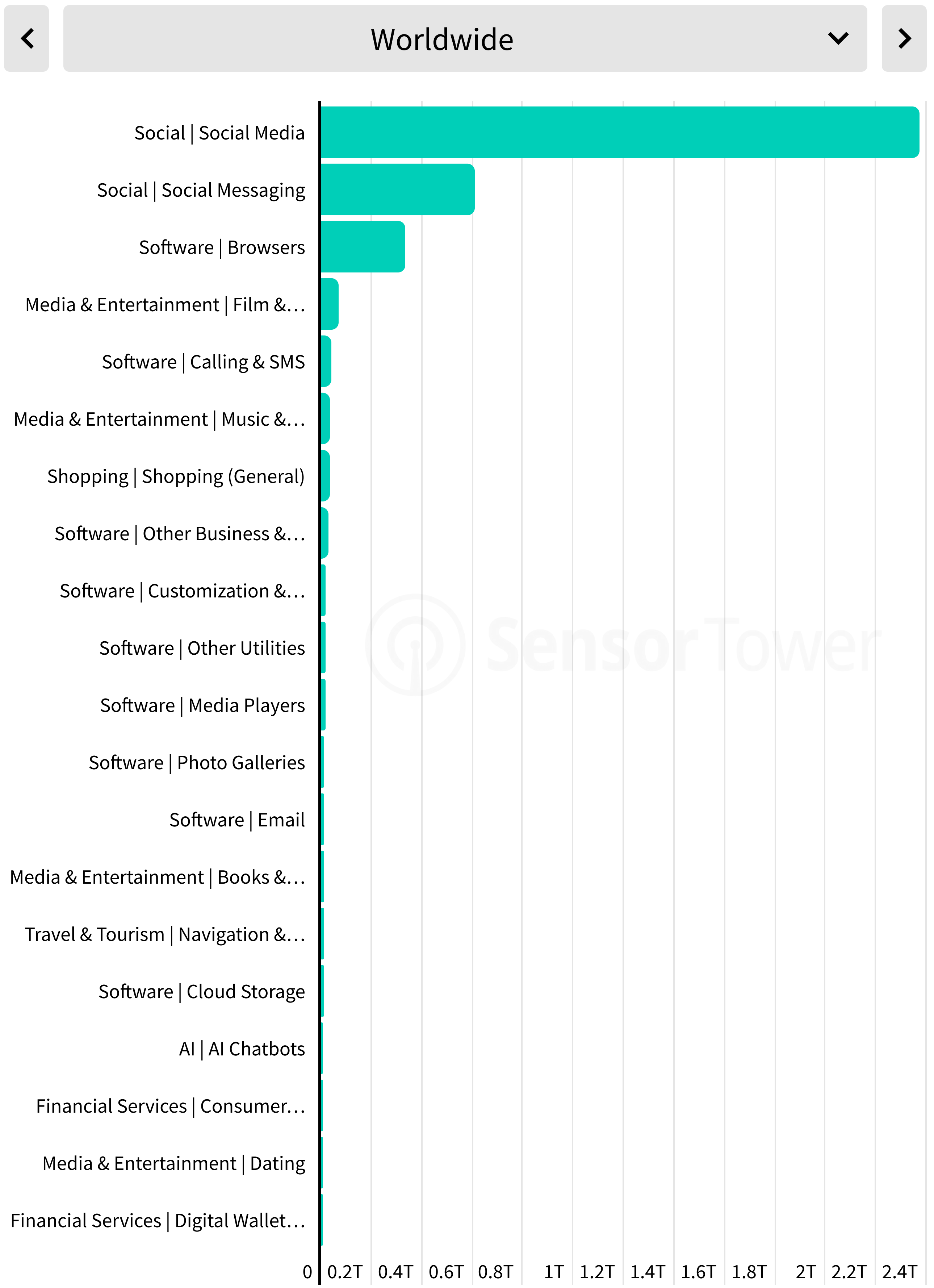
Mobile users spent nearly 2.4 trillion hours on Social Media apps in 2024 across iOS and Android devices, up 6% YoY. This was equivalent to 6.6 billion hours per day, or roughly an average of 50 minutes for every person on Earth. Messaging apps were a distant second at 607 billion hours, followed by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

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

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

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

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



Subgenre	YoY Growth	#1 App in the Subgenre
Social | Social Media	6%	TikTok
Social | Social Messaging	2%	WhatsApp Messenger
Software | Browsers	1%	Google Chrome
Media & Entertainment | Film &…	-5%	Disney+ Hotstar
Software | Calling & SMS	16%	Truecaller
Media & Entertainment | Music &…	6%	Spotify
Shopping | Shopping (General)	9%	Shopee
Software | Other Business &…	15%	WhatsApp Business
Software | Customization &…	21%	HiOS Launcher
Software | Other Utilities	22%	Clock
Software | Media Players	9%	PLAYit
Software | Photo Galleries	14%	Google Photos
Software | Email	3%	Gmail
Media & Entertainment | Books &…	-8%	WEBTOON
Travel & Tourism | Navigation &…	2%	Google Maps
Software | Cloud Storage	3%	Google Drive
AI | AI Chatbots	347%	Character AI
Financial Services | Consumer…	7%	SberBank Online
Media & Entertainment | Dating	3%	Badoo
Financial Services | Digital Wallet…	21%	Google Pay

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

AI Chatbots is the Breakout Subgenre for Downloads in 2024

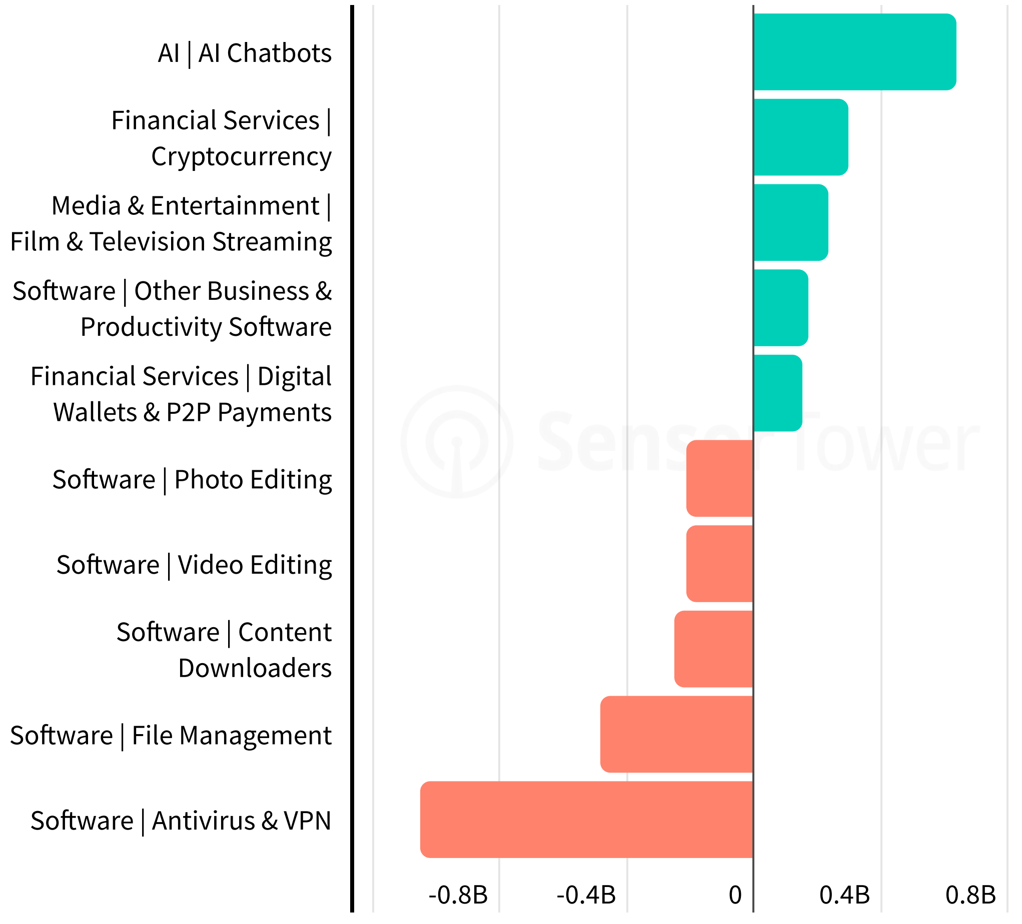
No subgenre built their user base more than AI Chatbots, which added 635 million more downloads in 2024 compared to 2023. The category was clearly appealing to users after download as well, with huge gains in time spent and IAP revenue. AI Chatbots ranked as the #3 subgenre by YoY revenue growth and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

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

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

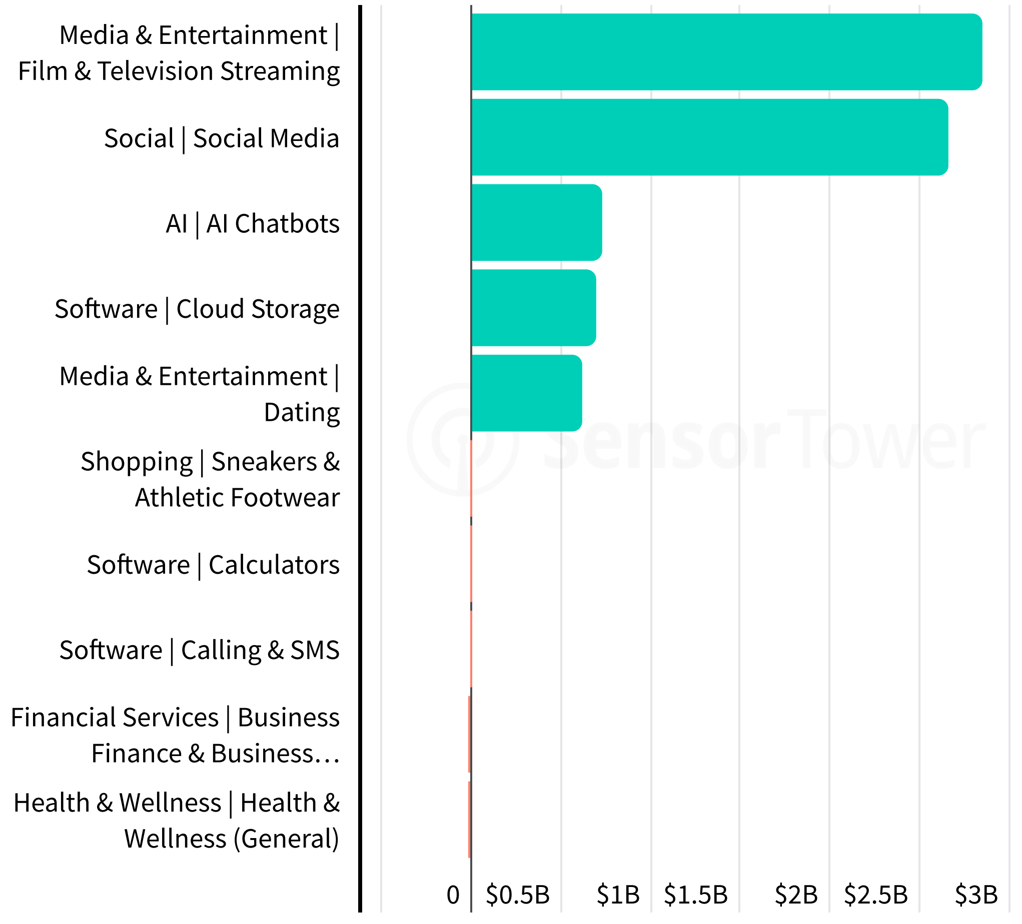
Downloads
App Growth 2024 YoY

Worldwide



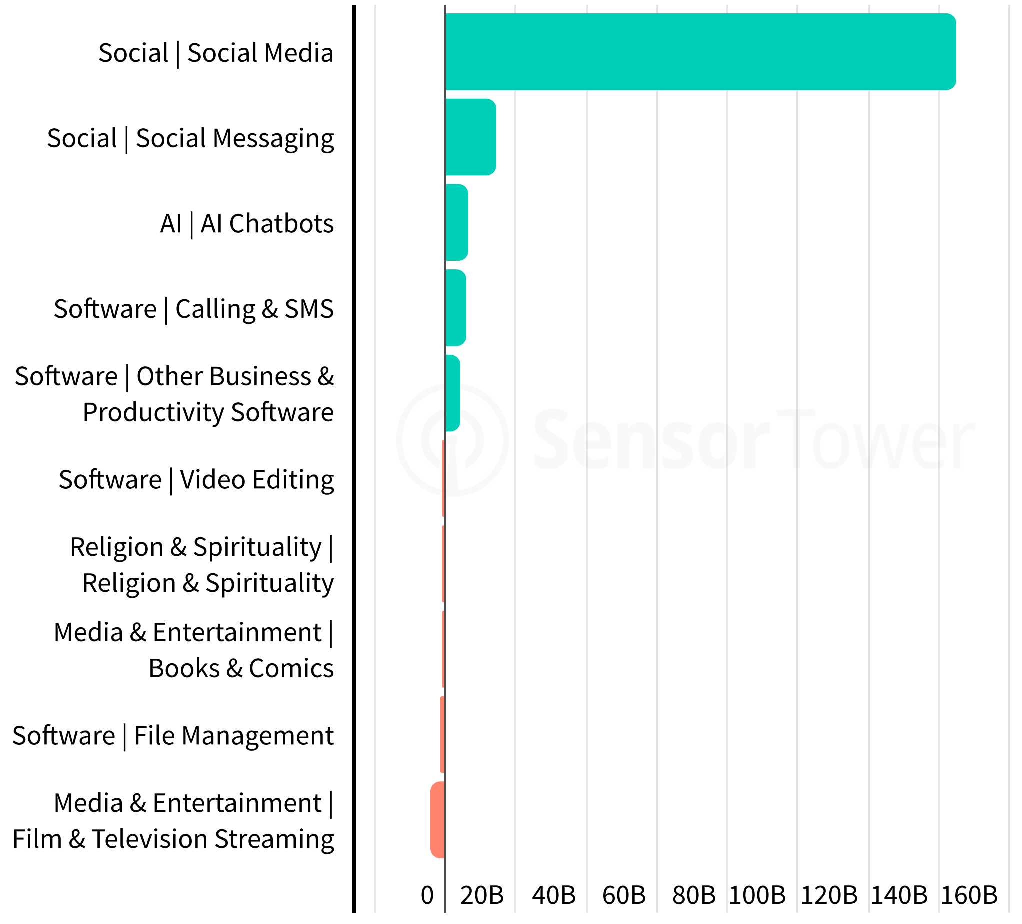
IAP Revenue
App Growth 2024 YoY

Worldwide



Time Spent (Hours)
App Growth 2024 YoY

Worldwide



Four Games Joined the Billion Dollar Club in 2024

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

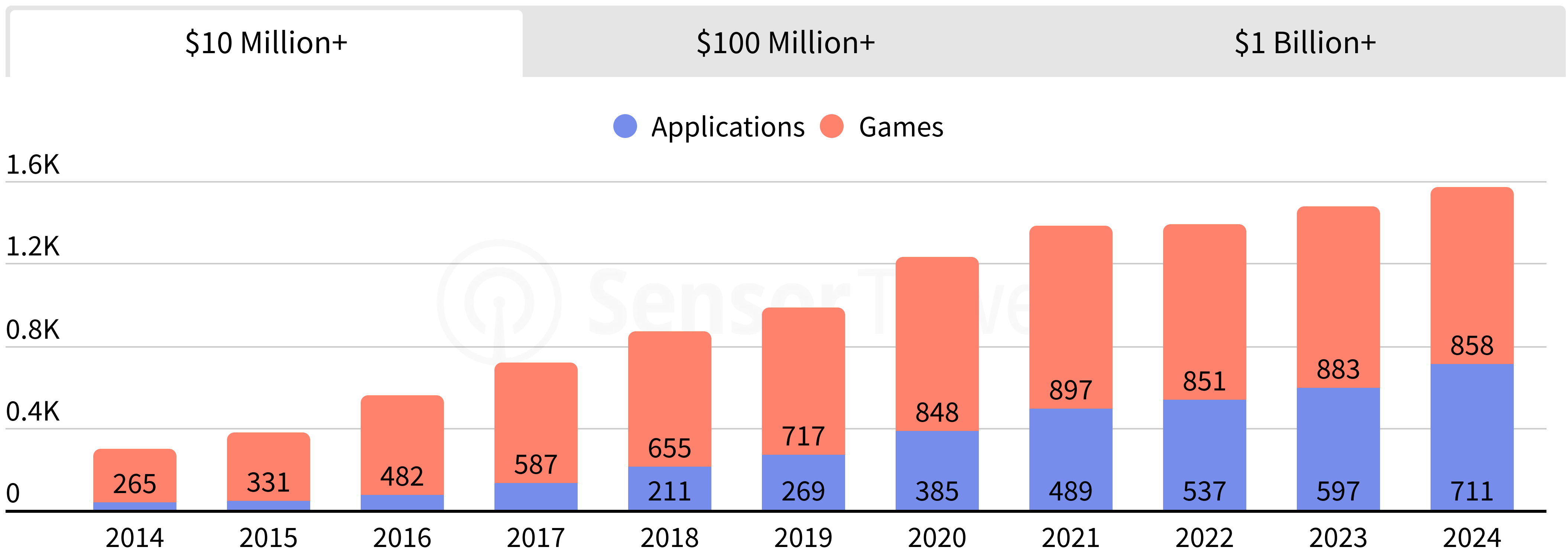
Interestingly, while the non-game market continues to flourish, only one non-game app surpassed $1 billion for the first time in a year: WeTV. Another streaming service may hit the milestone next year — Max fell just short in 2024.

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

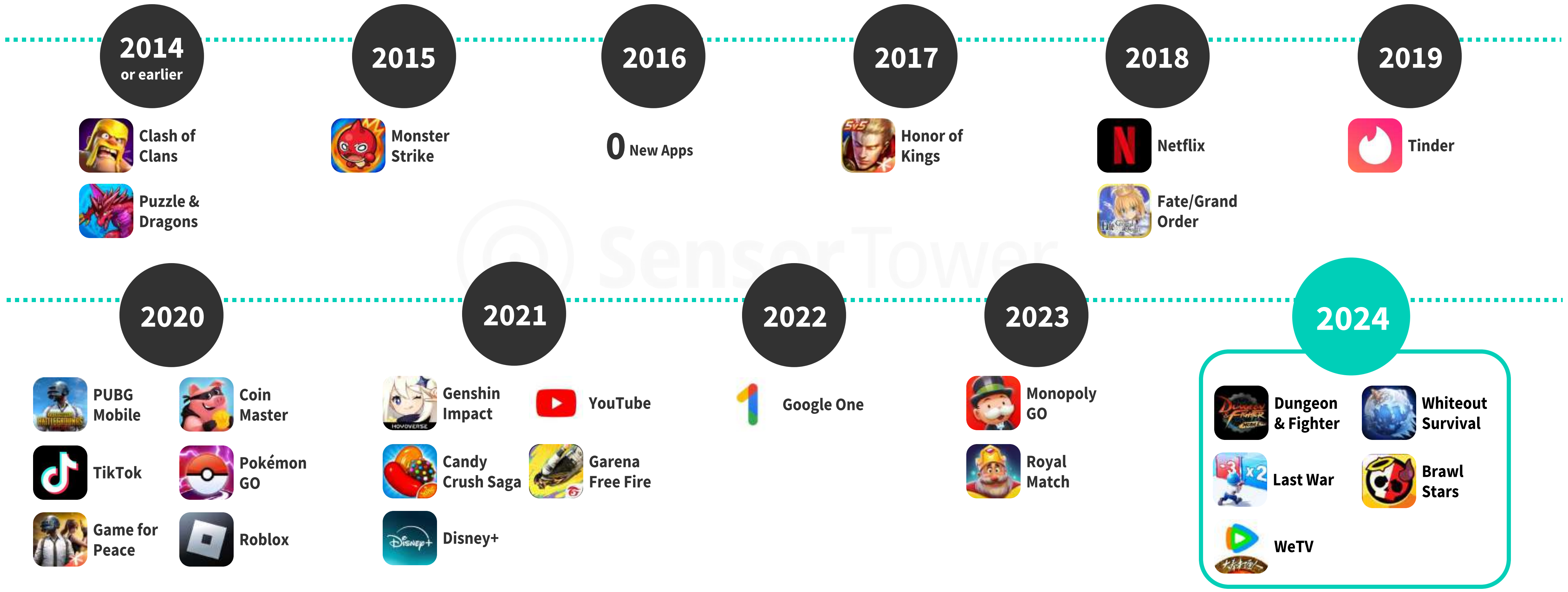
Explore the Full List of Leaders in 2024

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

Number of Apps Surpassing Annual Global IAP Revenue



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



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

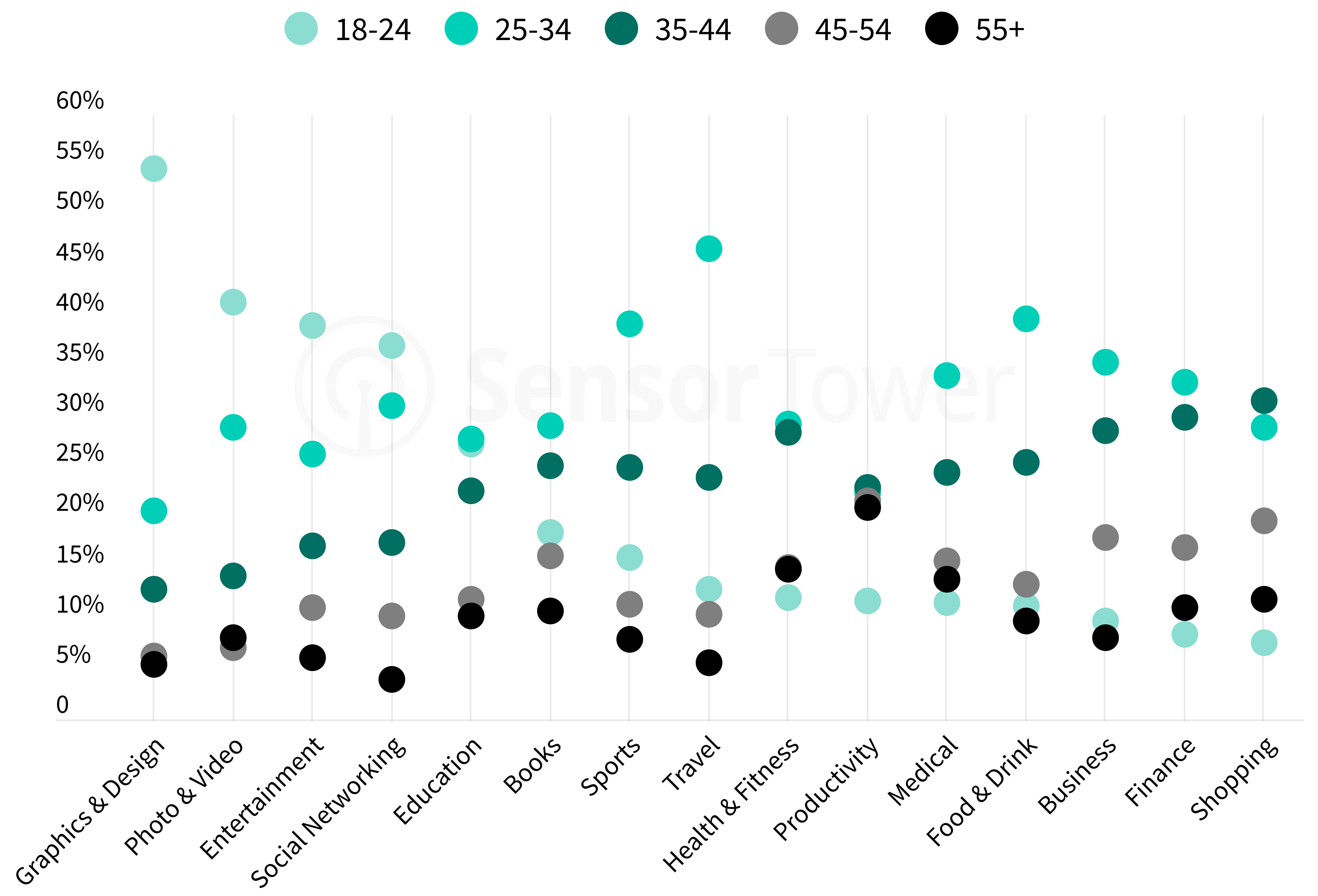
Gen Z Embraces User-Generated Content, from Videos to Pinboards

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

Interested in more Audience Insights?
Dive deeper into audience demographics and behavior by app, category, user persona, and more! Click here to learn more about Audience Insights from Sensor Tower.

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

Age Breakdown Among Select Categories
United States in Q4 2024



Top Apps by Share of Audience Using App
United States in Q4 2024

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

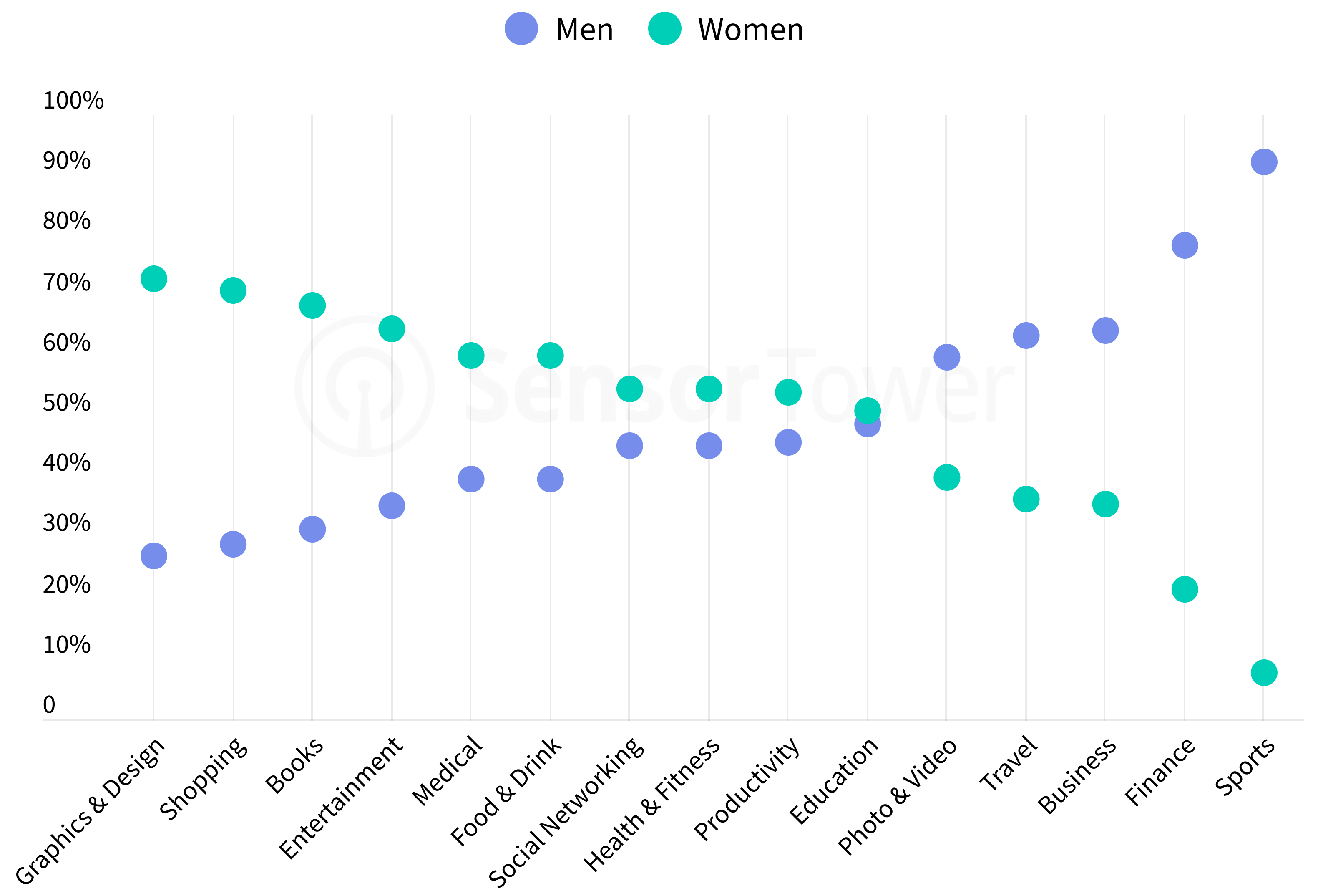
Graphics & Design and Shopping Skew Towards Women

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

Sensor Tower Customers Can Explore More!
Sensor Tower customer? Check out Audience Insights here for more categories, user personas, and so much more.

Source: Sensor Tower
Note: Among Android users in the United States. Includes YouTube and excludes other pre-installed apps. Gender represented as Men and Women only and is not representative of all gender identities.

Gender Breakdown Among Select Categories
United States in Q4 2024



Top Apps by Share of Audience Using App
United States in Q4 2024

	Men	Women
1	YouTube	YouTube
2	Spotify	Instagram
3	Instagram	Spotify
4	Amazon	Amazon
5	Facebook	Pinterest
6	WhatsApp	Facebook
7	Messenger	Messenger
8	Discord	WhatsApp
9	Reddit	TikTok
10	Snapchat	Venmo

02

Mobile Geo Expansion

Mobile is going global. App developers look to expand across regions and appeal to a broad audience, from the Americas to Europe to Asia. This means localizing everything from the app's content to the ad campaigns for each market to improve user acquisition and engagement.

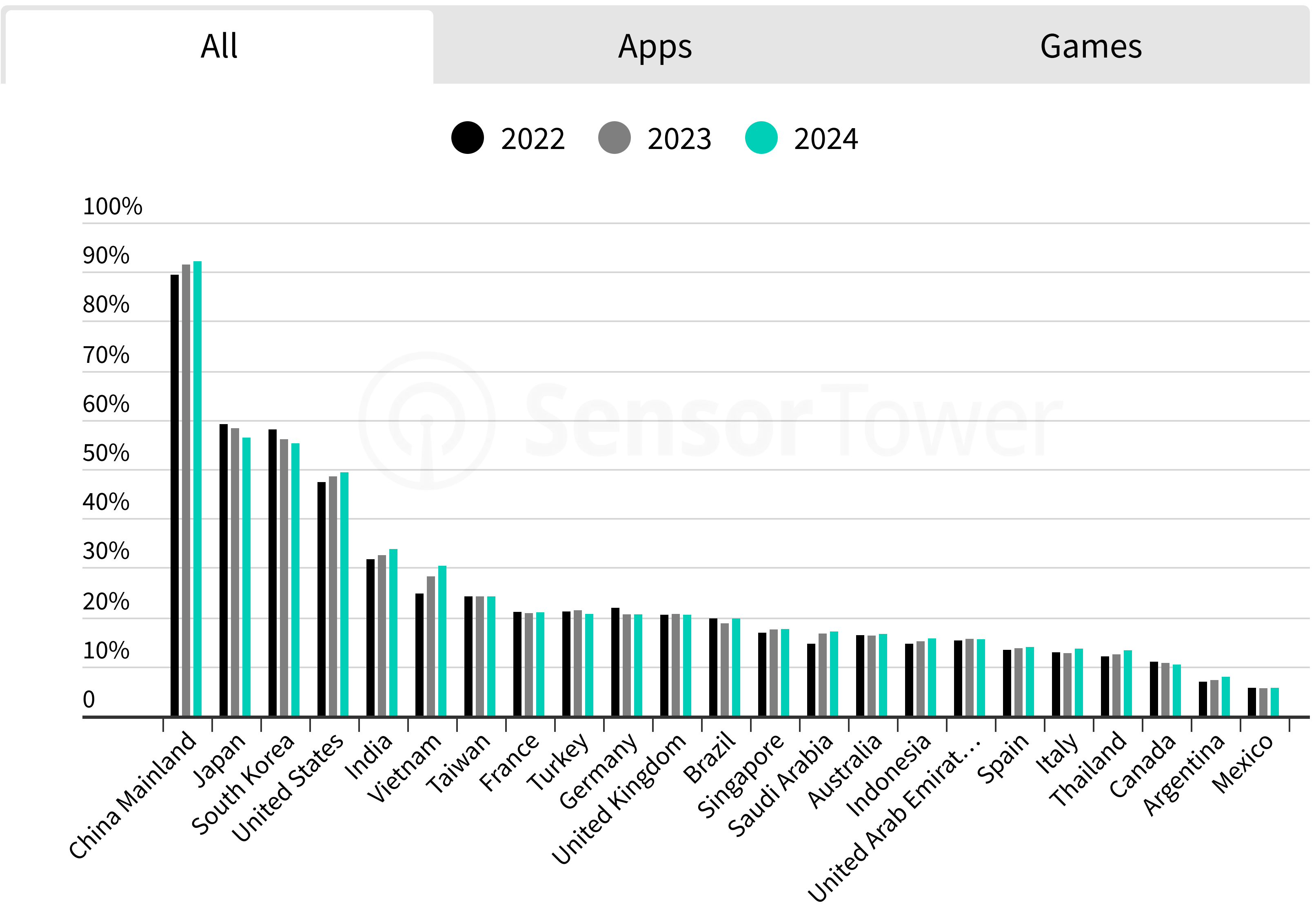
Mobile Geo Expansion

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

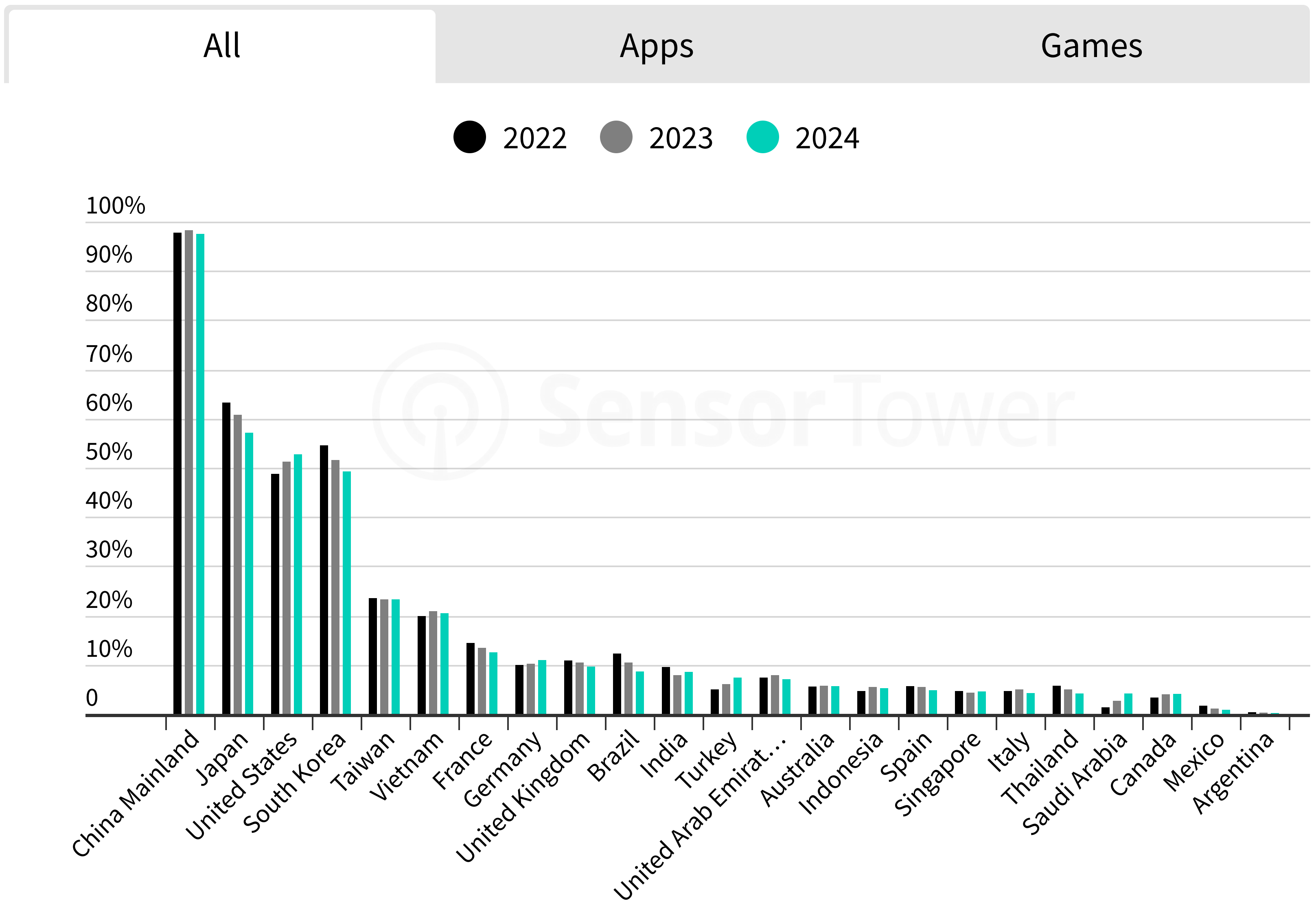
Nearly four out of every five app downloads and dollars spent across iOS and Goolge Play was outside of the country where the app was developed. However, the presence of foreign-based publishers varied significantly between markets. In China Mainland, more than 90% of downloads and consumer spend was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

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

Share of Market's Downloads from Domestic Publishers



Share of Market's IAP Revenue from Domestic Publishers



Mobile Geo Expansion

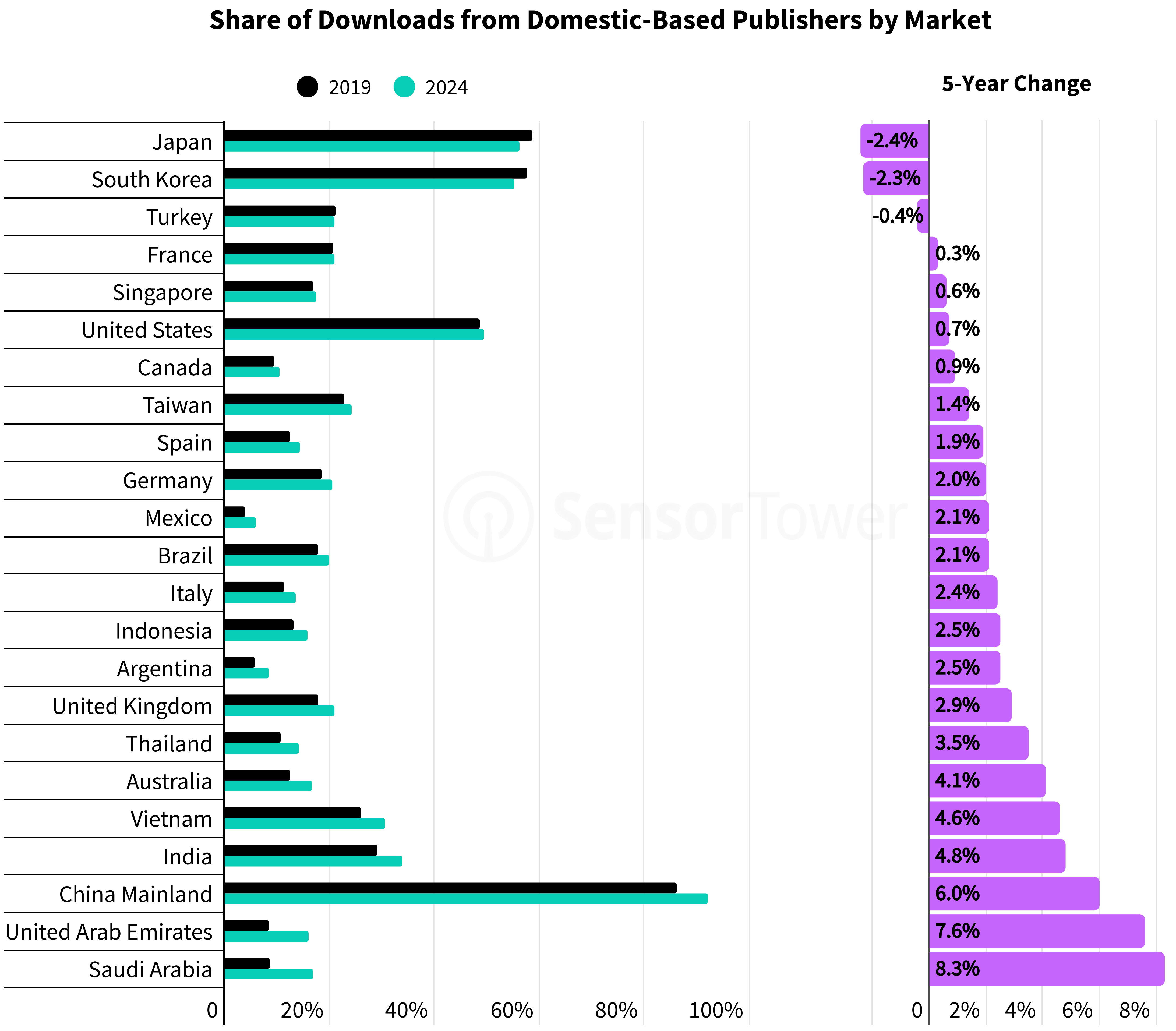
Domestic-Based Publishers Gained Ground in Most Markets Except Japan and South Korea

The share of downloads coming from app publishers based in each market increased over the past five years in most markets, including China Mainland, the United Kingdom, and the United States. Publishers based in two Middle East markets, Saudi Arabia and the UAE, have really gained ground in their respective markets.

For example, publishers based in Saudi Arabia accounted for nearly 17% of the downloads in Saudi Arabia in 2024. While publishers based outside of Saudi Arabia still took most of the downloads in the market (83%), the share has shifted dramatically over the past five years. In 2019, domestic publishers took only 8.6% of downloads in Saudi Arabia with 91.4% coming from foreign publishers.

Japan, South Korea, and Turkey were the only markets to see the share of downloads from domestic publishers decline over the past five years. Japan and South Korea have been challenging markets for foreign publishers to break into historically due to high localization costs and relatively unique consumer preferences in those markets.

Source: Sensor Tower
Note: iOS and Google Play combined. Displays the share of downloads from publishers with headquarters located in each market (vs. downloads from publishers based oustide that market).

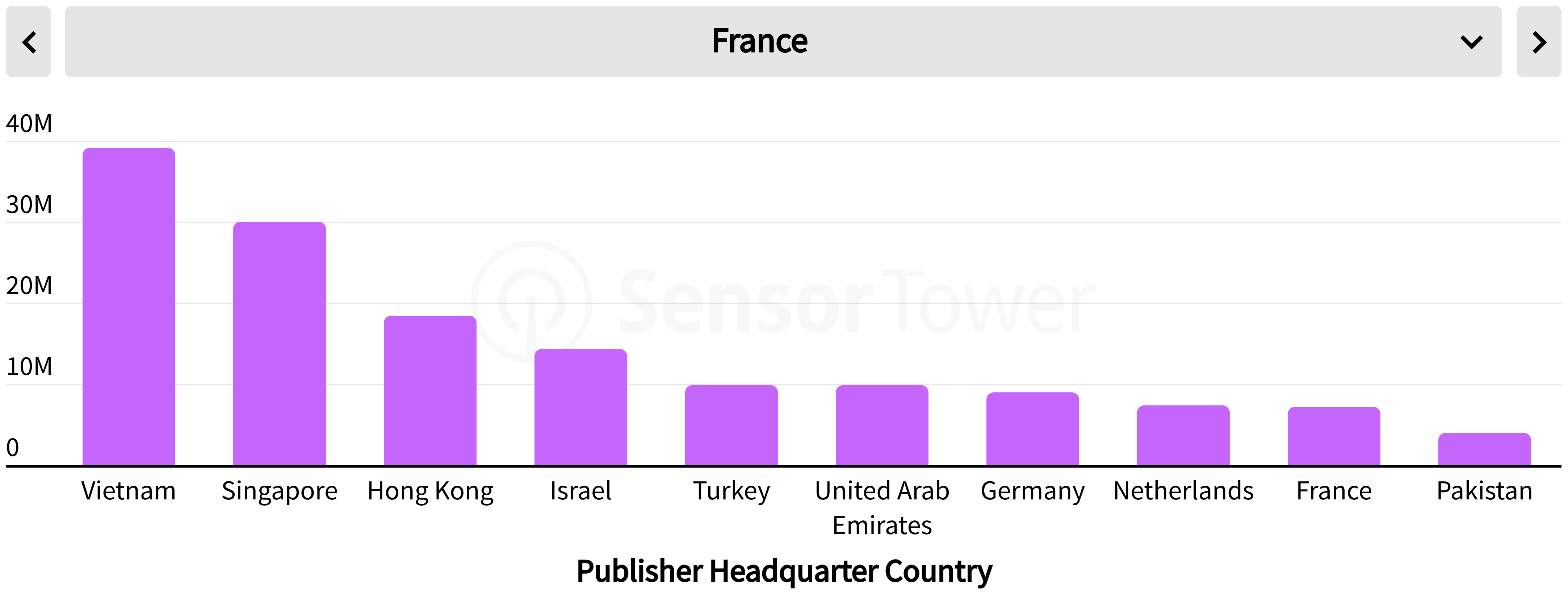


Mobile Geo Expansion

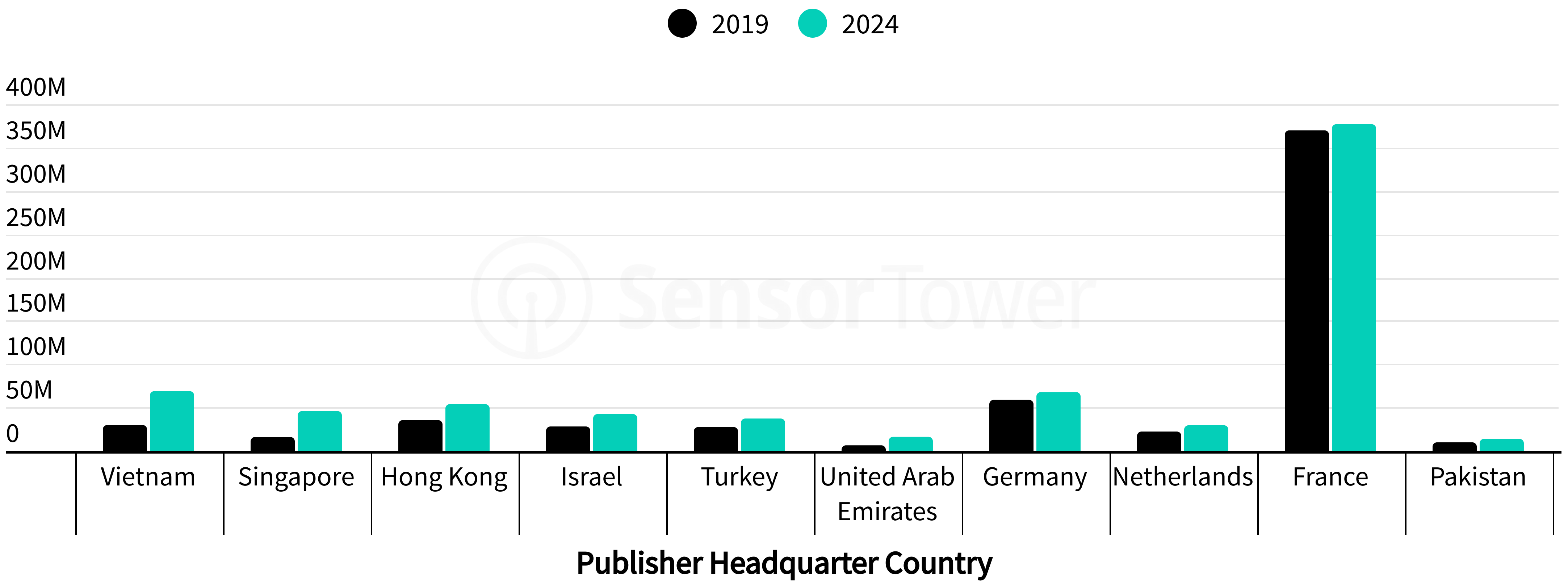
APAC Publishers Added the Most Market Share in Japan and South Korea

Publishers based in markets like Singapore, Hong Kong, and Vietnam have gained the most ground over the past five years. Singapore-based publishers had the highest download growth between 2019 and 2024 in Japan and the United States, while Vietnam-based publishers led the way in France, Singapore, South Korea and Turkey.

Download Growth Between 2019 - 2024 by Publisher Headquarter Country



Yearly Downloads by Publisher Headquarter Country, 2019 vs. 2024



Source: Sensor Tower
Note: iOS and Google Play combined.

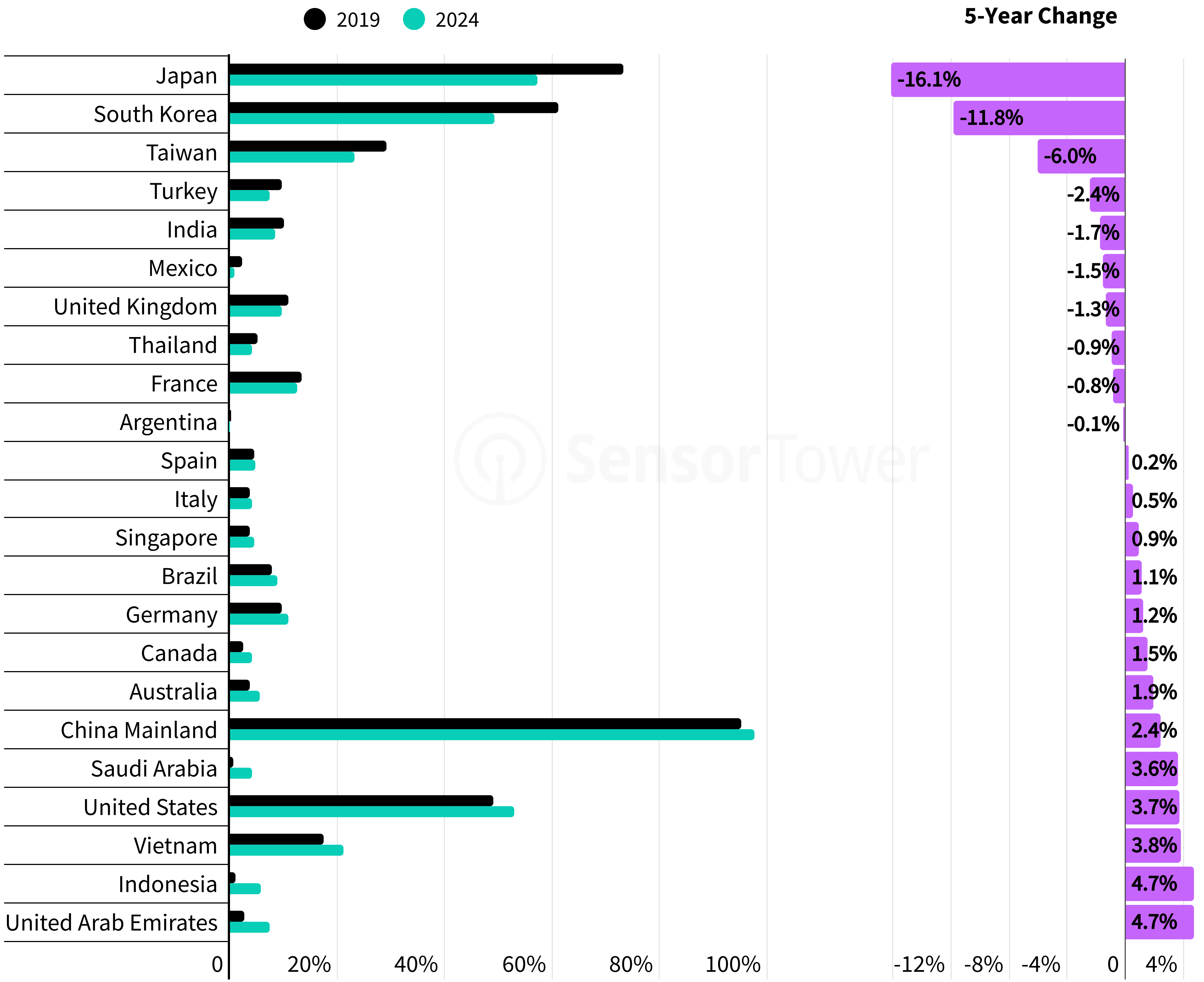
Publishers Expand into New Markets for Revenue Growth

Several top APAC markets saw their share of revenue from local publishers decline as they faced competition from app developers in China Mainland, the US, and other markets. The share of Japan's IAP revenue from domestic-based publishers declined 16 percentage points between 2019 and 2024, and South Korea had a 12 percentage point decline over the same period.

Interestingly, the share of IAP revenue in the US from US-based publishers actually increased over the past five years. More than half of every dollar spent on IAPs in the US went to US-based companies in 2024.

Source: Sensor Tower
Note: iOS and Google Play combined. Revenue is gross — inclusive of any percent taken by the app stores. Displays the share of IAP revenue from publishers with headquarters located outside in each market (vs. IAP revenue from publishers based outside that market).

Share of IAP Revenue from Domestic-Based Publishers by Market



Mobile Geo Expansion

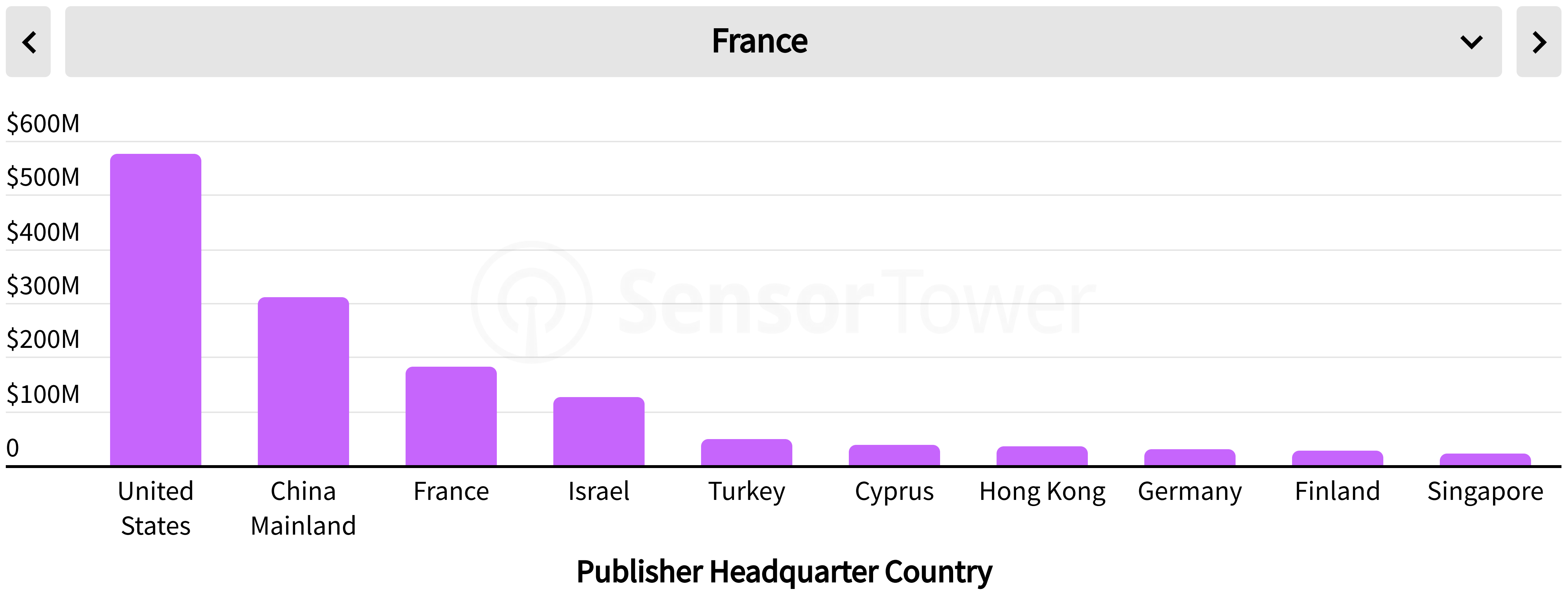
China and United States App Developers Have a Global Reach

With the US and China markets becoming more saturated, app publishers from these markets have expanded across the globe. Publishers from these markets saw the largest IAP revenue growth between 2019 and 2024 across top markets in APAC and EMEA, including Japan, South Korea, the UK, and France.

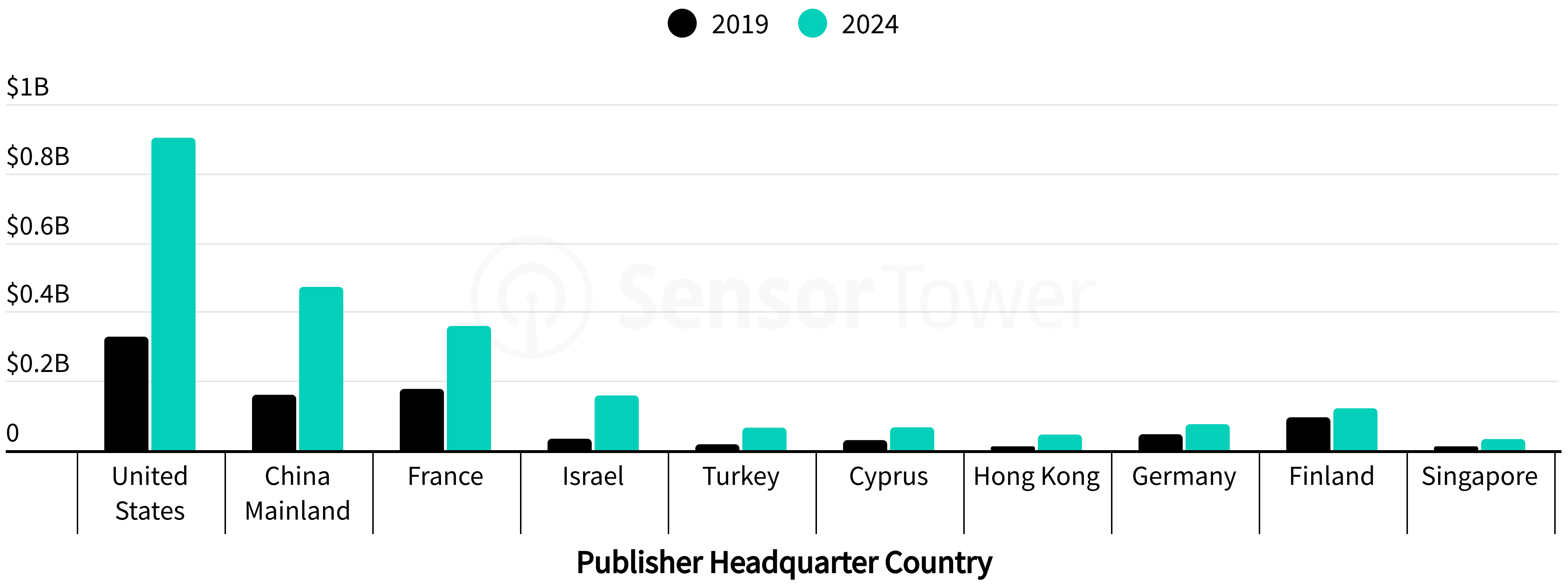
Excluding the US and China Mainland, other top publisher locations varied by market. Turkey ranked third by IAP revenue growth in Japan and the US. Singapore, Hong Kong, and Israel also ranked among the top 10 in several markets.

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

IAP Revenue Growth Between 2019 - 2024 by Publisher Headquarter Country



Yearly IAP Revenue by Publisher Headquarter Country, 2019 vs. 2024



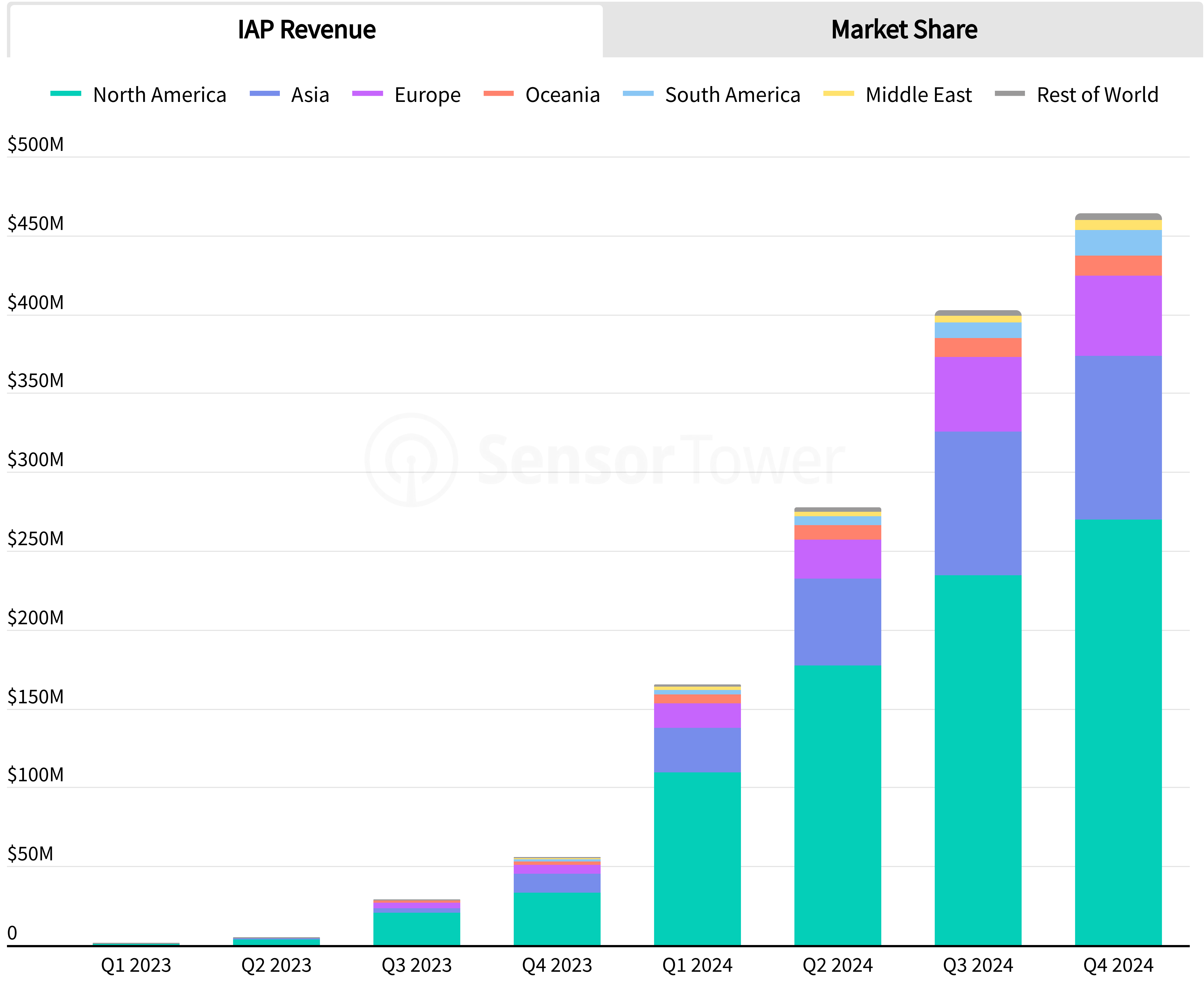
Mobile Geo Expansion

Short Drama Apps Have Rapidly Gained Global Appeal

First popularized in China, short drama apps feature super short episodes designed to be watched on your phone. These apps began to find success in western markets starting in 2023, particularly in the US.

Early top players in the short drama space have expanded to other regions outside of the US to find more users and boost revenue. This requires creating specific content for these markets in addition to localizing the app screenshots, descriptions, and ad campaigns. By Q4 2024, Asia contributed 22% of short drama IAP revenue and Europe accounted for 11%.

IAP Revenue by Region for Top Short Drama Apps



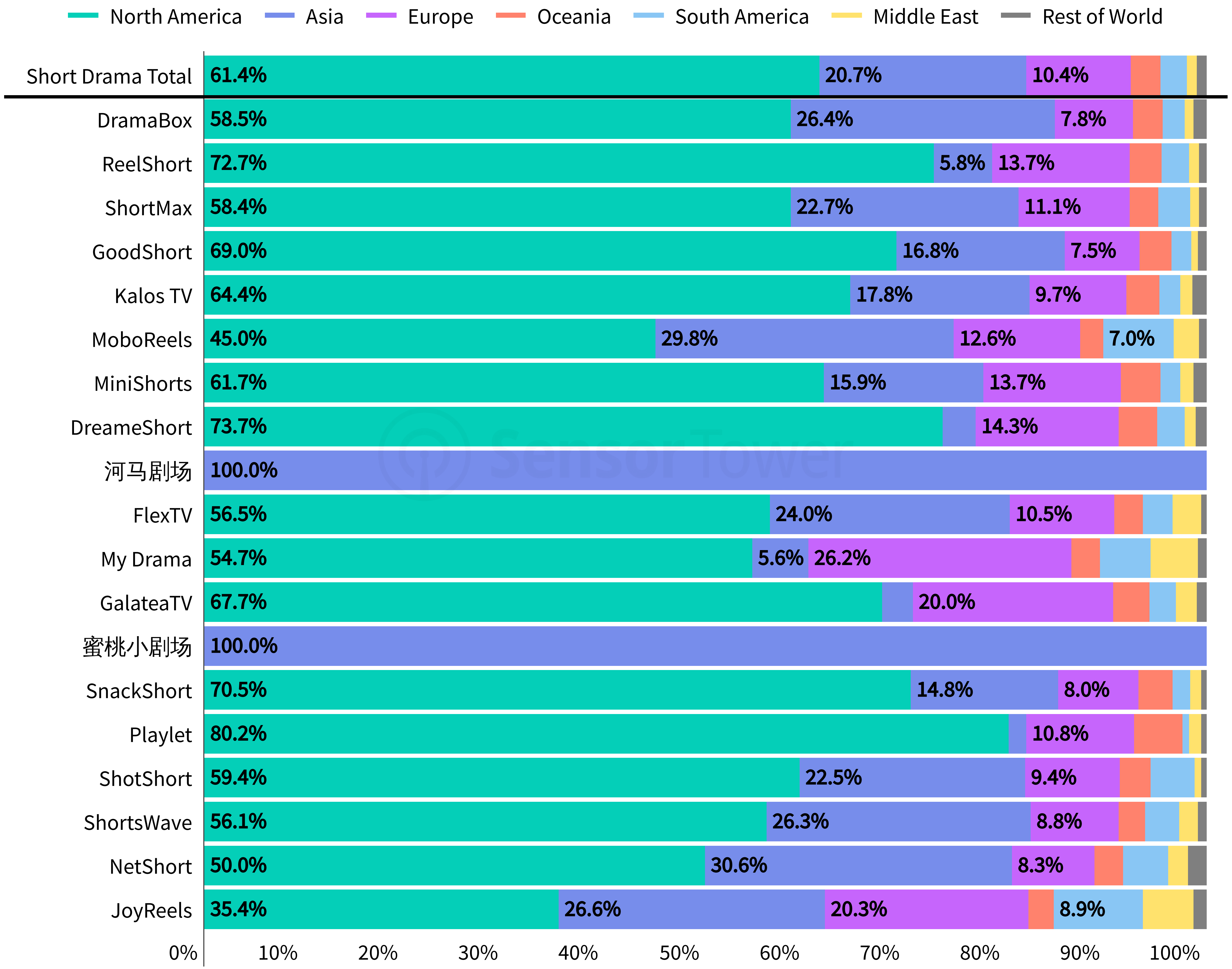
Source: Sensor Tower
Note: iOS and Google Play combined. Revenue is gross — inclusive of any percent taken by the app stores. Sample includes 19 top short drama apps.

Top Short Drama Apps are Popular in the US and Across Other Regions

Short drama apps can find some success in Europe and Asia even if they are only in English, but adding content in other languages can be a nice way to find growth in new markets. The top short drama apps in particular tend to target several non-English markets in addition to markets like the US, Canada, the UK, and Australia. For example, DramaBox and ReelShort are now both localized for Brazil, France, Germany, Japan, and South Korea.

Playlet is an example of a short drama app that is still primarily in English. As a result, more than 80% of its IAP revenue in 2024 was from North America and less than 2% came from Asia.

Share of IAP Revenue by Region for Top Short Drama Apps in 2024



Source: Sensor Tower
Note: iOS and Google Play combined. Revenue is gross — inclusive of any percent taken by the app stores. Sample includes 19 top short drama apps.

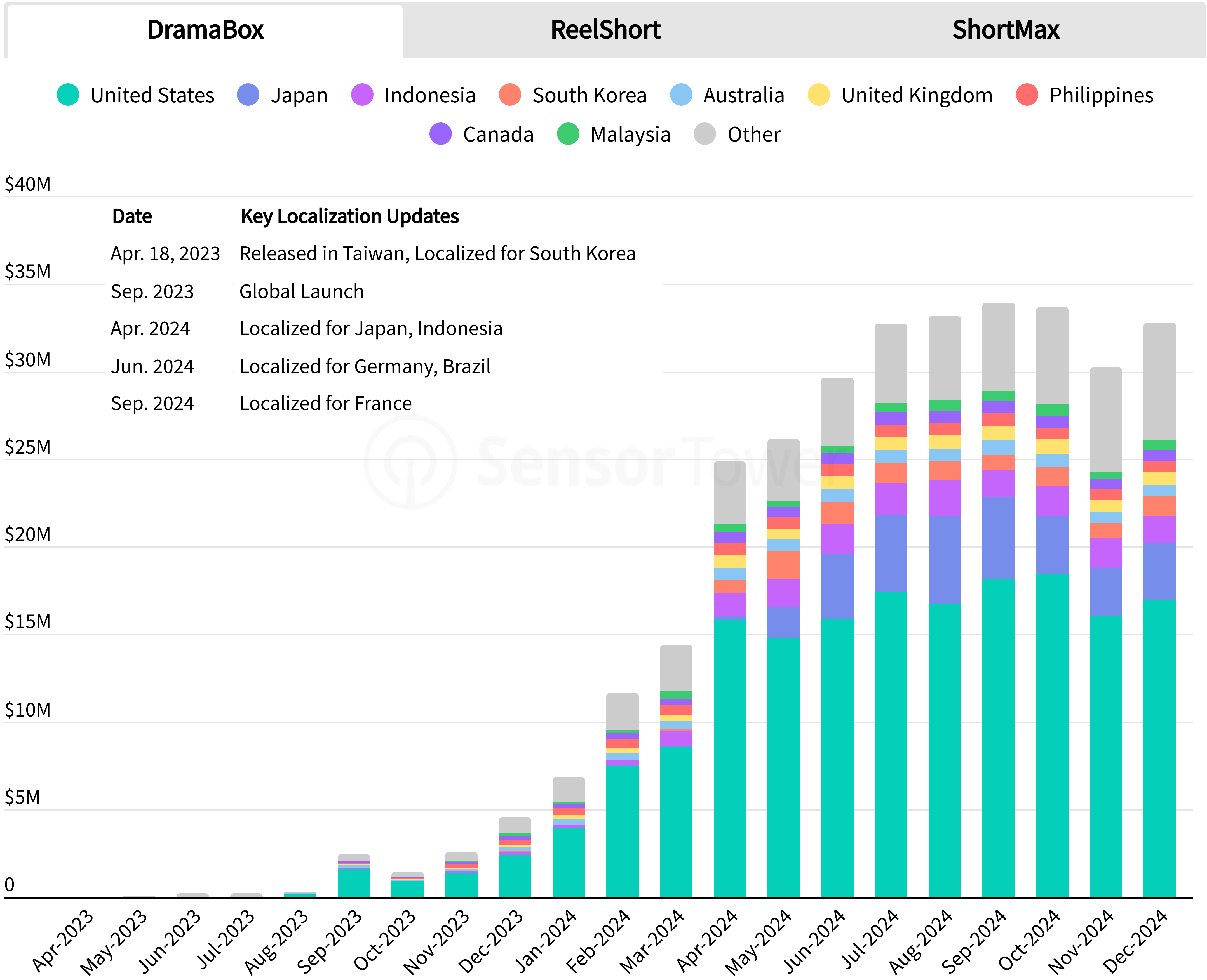
See How Top Short Drama Apps Gradually Expanded to New Markets

The market leaders in the short drama space all found early popularity in the US before gradually adding additional languages to target key markets. Interestingly, each of these apps had a slightly different strategy for which markets to prioritize after the US.

DramaBox was quick to support some APAC languages, including launching with localization for South Korea. It added support for Japan and Indonesia before localizing the app for European markets. ShortMax also prioritized APAC, quickly localizing for Japan, South Korea, Indonesia, and Thailand.

ReelShort, on the other hand, prioritized European markets like Germany and France before expanding to Japan and South Korea. As a result, Asia contributed a relatively low share of revenue.

IAP Revenue by Country for Top Short Drama Apps



Date	Key Localization Updates
Apr. 18, 2023	Released in Taiwan, Localized for South Korea
Sep. 2023	Global Launch
Apr. 2024	Localized for Japan, Indonesia
Jun. 2024	Localized for Germany, Brazil
Sep. 2024	Localized for France

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

For Emerging Short Drama Competitors, Potential New Markets Await

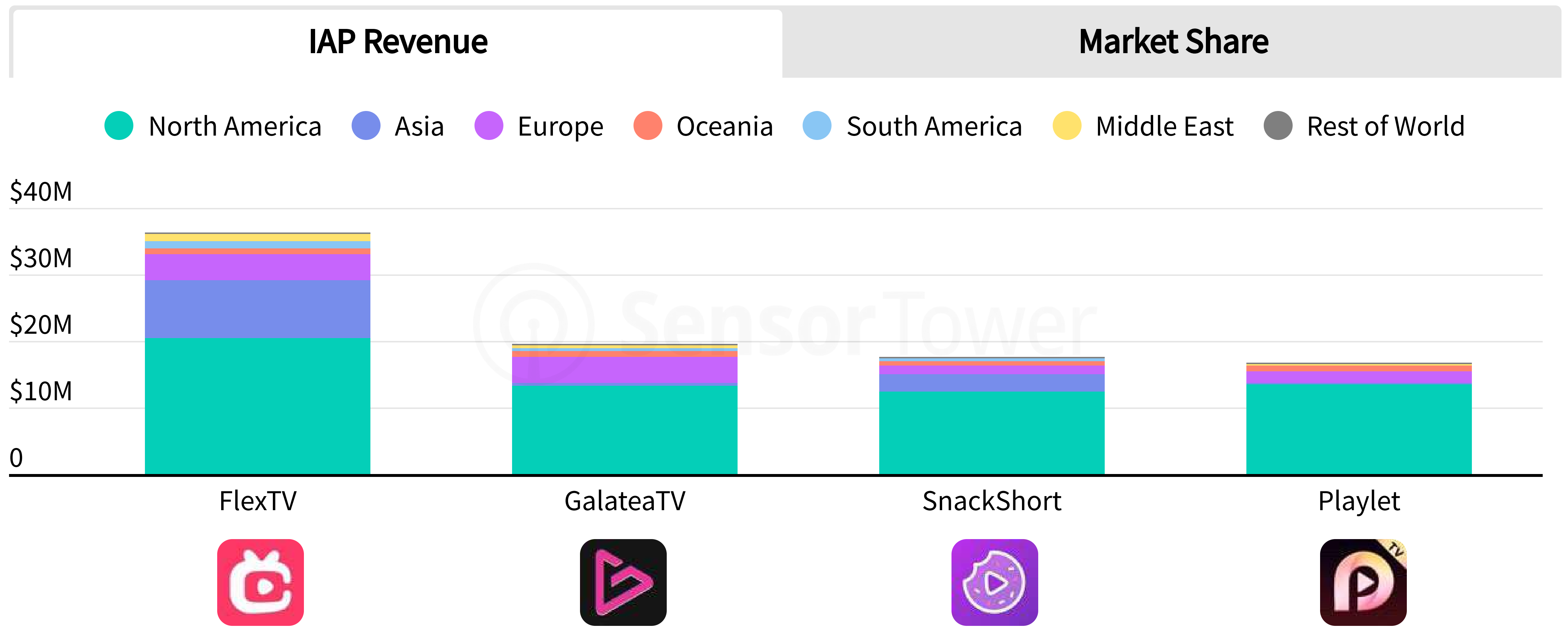
While DramaBox, ReelShort, and ShortMax all have content and language support for most of the world's biggest markets, some emerging competitors are in an earlier stage in their geo expansion. FlexTV, for example, has localized for Brazil, Japan, and South Korea, but has yet to focus on European markets like Germany and France. GalateaTV, by comparison, has a very small footprint in Asia since it has yet to localize for the top markets in that region.

GalateaTV, SnackShort, and Playlet have all made solid progress in North America with around $13 million in IAP revenue in 2024. To compete with the leaders in the space, these apps will need to continue to grow their reach in the US while also starting to compete in some of the largest non-English speaking markets in Asia and Europe.

Top Short Drama App Internationalization

Rank	App	Brazil	France	Germany	Japan	South Korea
1	DramaBox	Full	Full	Full	Full	Full
2	ReelShort	Full	Full	Full	Full	Full
3	ShortMax	Partial (Not App Name)	None	Partial (Not App Name)	Partial (Not App Name)	Partial (Not App Name)
10	FlexTV	Full	None	None	Full	Full
12	GalateaTV	Full	Full	Full	None	None
14	SnackShort	None	None	None	Full	Full
15	Playlet	None	None	None	None	None

IAP Revenue by Region for Emerging Short Drama Apps



Source: Sensor Tower

Note: iOS and Google Play combined. Revenue is gross — inclusive of any percent taken by the app stores. App rank is by IAP revenue in 2024 among top short drama apps.

03

AI on Mobile

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

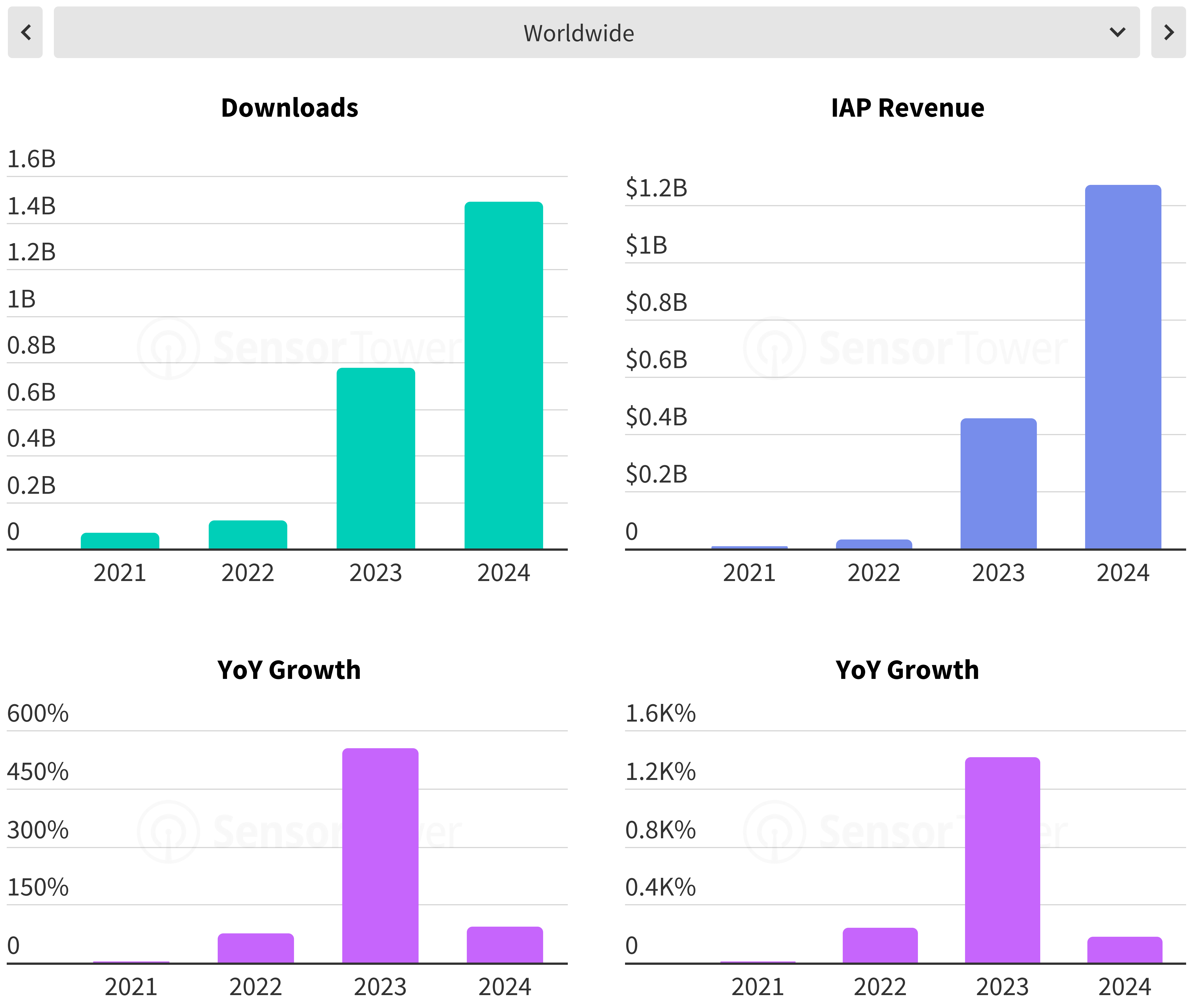
AI Apps are Already a Billion Dollar Industry

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

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

Want More AI Insights?
Check out our report covering the AI app market from 2024. And since the AI app market is ever evolving, look out for more AI-related content on our blog.

Yearly Trends for Generative AI Apps



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

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

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

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

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

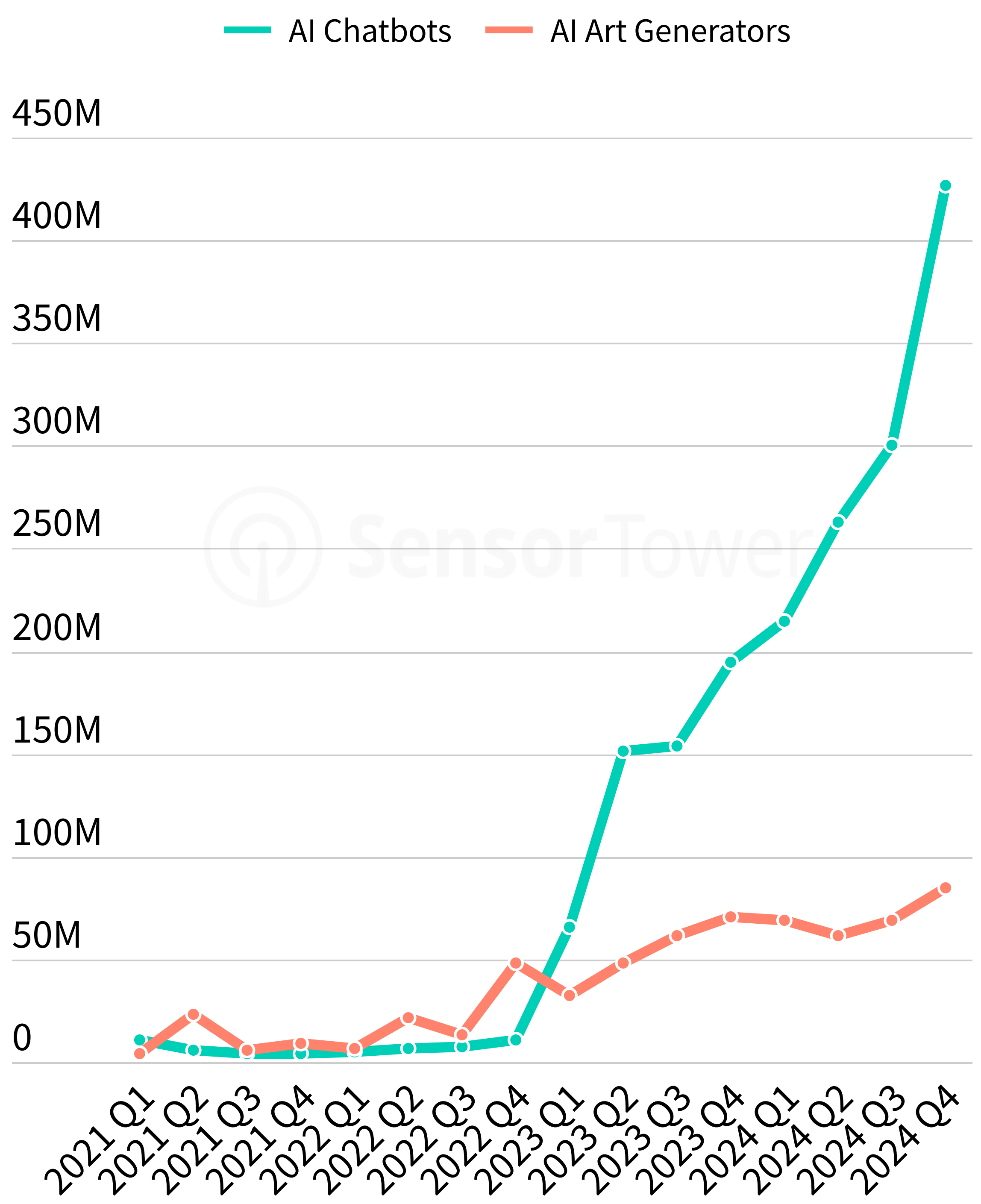
Track the Latest AI Launches with Top Apps
Monitor how the top AI apps are performing in 90+ markets and quickly identify any new breakouts with Sensor Tower's Top Apps. Sensor Tower customers can check it out here.

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

Generative AI Download Trends by Subgenre

Worldwide

Quarterly Downloads by Subgenre



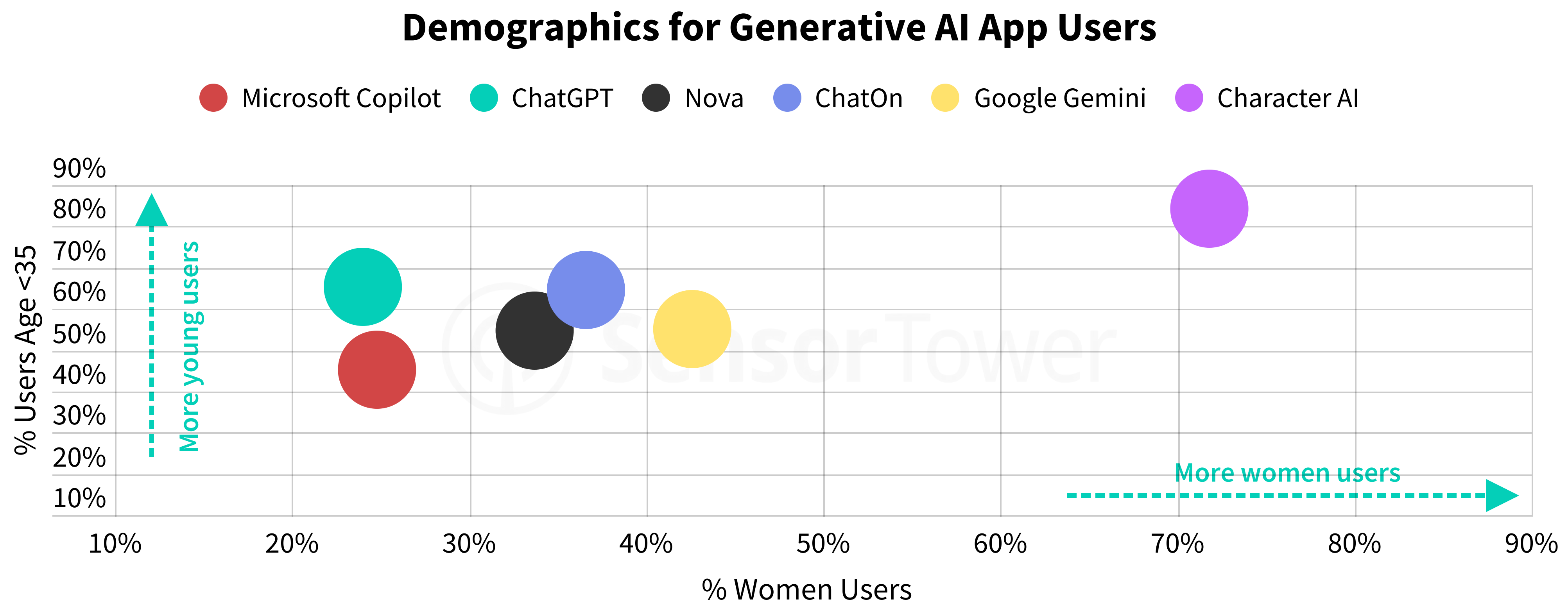
Top Apps by Downloads in 2024

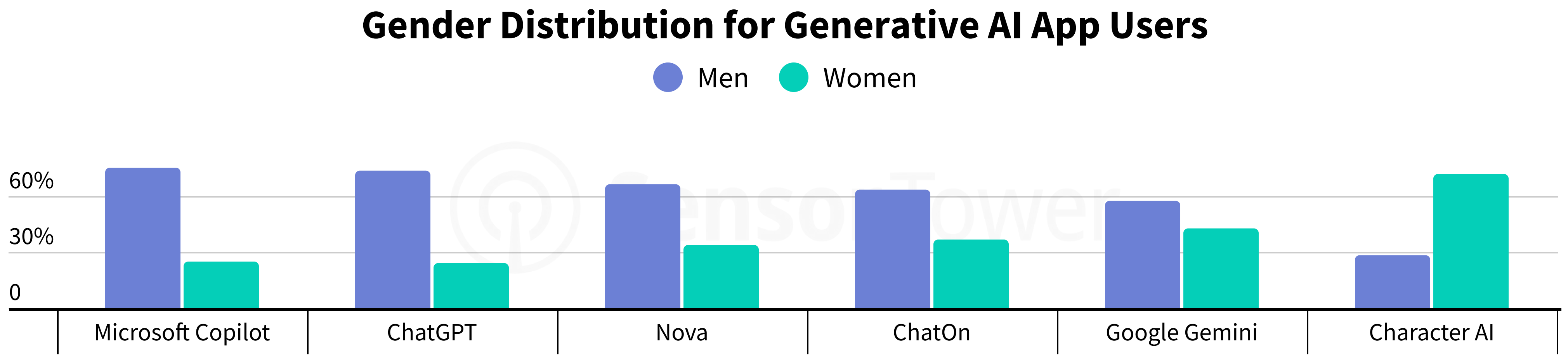
	App	Subgenre
1	ChatGPT	AI Chatbots
2	Google Gemini	AI Chatbots
3	Doubao	AI Chatbots
4	Microsoft Copilot	AI Chatbots
5	AI Chatbot - Nova	AI Chatbots
6	Talkie	AI Chatbots
7	Chatbot AI & Smart Assistant	AI Chatbots
8	ChatOn	AI Chatbots
9	Character AI	AI Chatbots
10	Genius	AI Art Generators

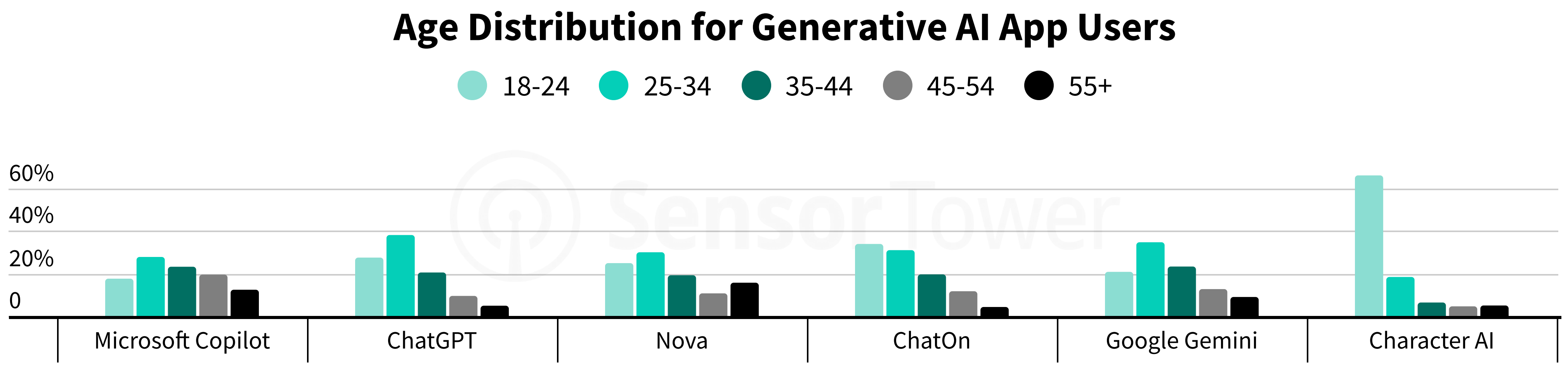
Generative AI Apps, Most Popular with Young Men, are Making Progress with Other Demographics

Most of the top Generative AI apps skew towards a young, male demographic. For example, men outnumber women using ChatGPT three to one, and 65% of ChatGPT users are under the age of 35. Character AI is an exception, with women accounting for more than 70% of its user base.

These apps are slowly gaining more broad appeal. Women's share of ChatGPT users increased by roughly four percentage points between Q4 2023 and Q4 2024, and women's share of Microsoft Copilot users climbed from 18% to 25% over this same period.







Source: Sensor Tower
Note: Among Android users in the United States in Q4 2024. Gender represented as Male and Female only and is not representative of all gender identities.

ChatGPT Boosts Productivity for Coders, Freelancers, and Students

Despite similar demographic breakdowns for many of the top Generative AI apps, Audience Insights reveal different focuses for the top apps in the space. Top personas for ChatGPT users include Crypto Traders, Sneakerheads, and Students, and the app is clearly a useful tool for students, freelancers, and crypto enthusiasts alike.

Microsoft Copilot, on the other hand, has mostly caught on with users of Microsoft's other app offerings. Character AI, meanwhile, is used primarily as an entertainment offering rather than for work or education. Character AI users, disproportionately younger women, most frequently fall into the Digital Socialite, Console Gamers, and Music Streamers personas.

Audience Insights for Top Generative AI Apps

United States

ChatGPT | Microsoft Copilot | Character AI | ChatOn AI

Top Apps That Generative AI App Users are More Likely To Use

1. Claude by Anthropic
2. Perplexity
3. Otter Transcribe Voice Notes
4. GitHub
5. Coursera
6. CoinMarketCap
7. Blind - Professional Community
8. TradingView
9. Waking Up: Meditation & Wisdom
10. Fiverr - Freelance Service

Top Personas for Generative AI App Users

1. Crypto Traders
2. Sneakerheads
3. Frequent Car Renters
4. Students
5. Digital Daters

Source: Sensor Tower

Note: Among Android users in the United States in Q4 2024.

ChatGPT — Providing Utility and Entertainment — Monetizes Better Than Any Other AI App

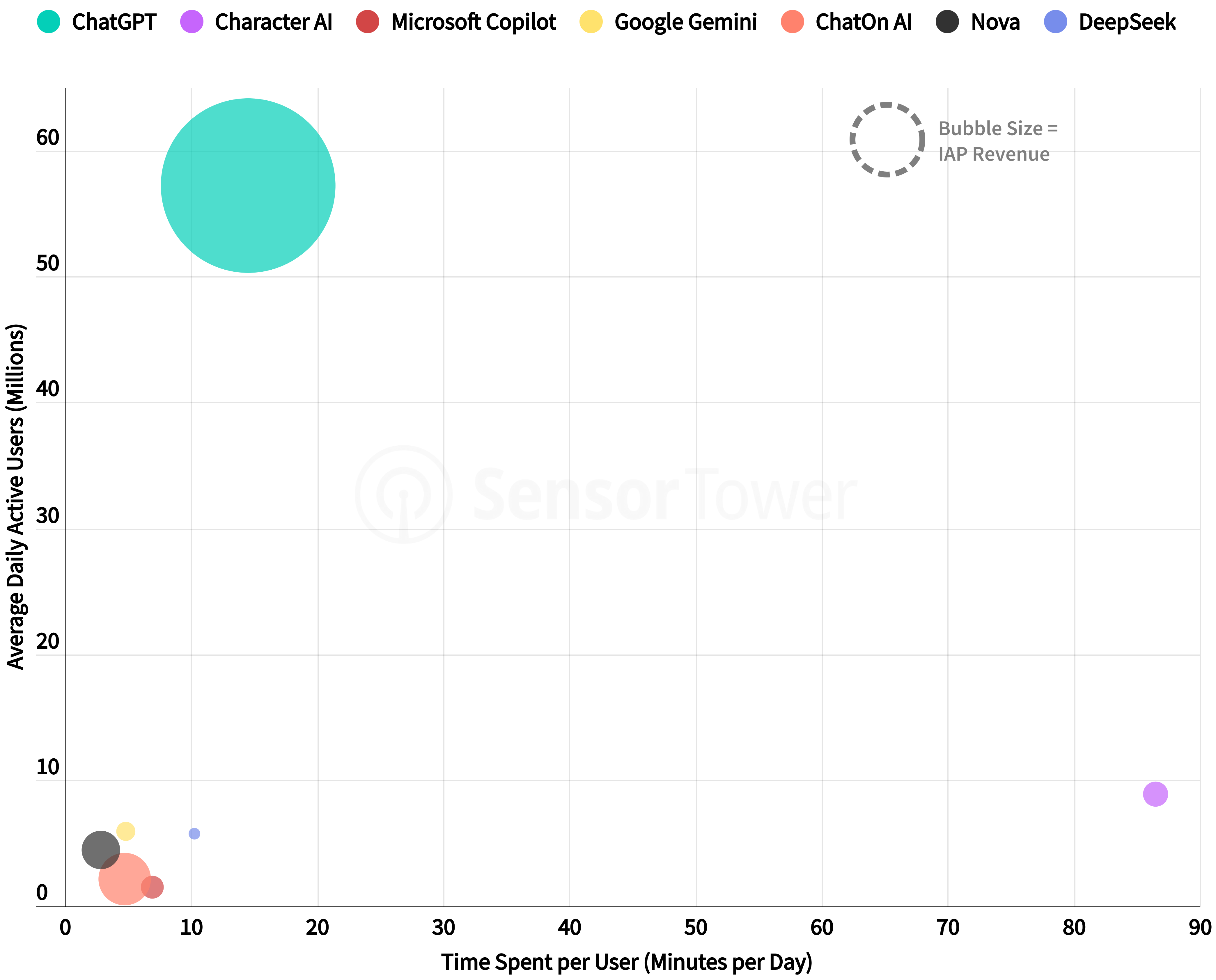
ChatGPT is currently the leading Generative AI app for boosting productivity and has built the largest user base, helping it become the runaway leader in terms of monetization. ChatGPT's IAP revenue surpassed $500 million in 2024 — no other Generative AI app reached $100 million for the year. And by Q1 2025, ChatGPT ranked #6 among the top overall non-games by IAP revenue.

Character AI is once again an outlier, with users spending an astounding 86 minutes per day on average. Since the app is mostly focused on providing entertainment rather than boosting productivity like ChatGPT, it has yet to monetize at the same level.

Source: Sensor Tower
Note: iOS and Google Play combined.

Average Daily Time Spent vs. Average Daily Active Users (DAU) Top Generative AI Apps

Worldwide, Q1 2025



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

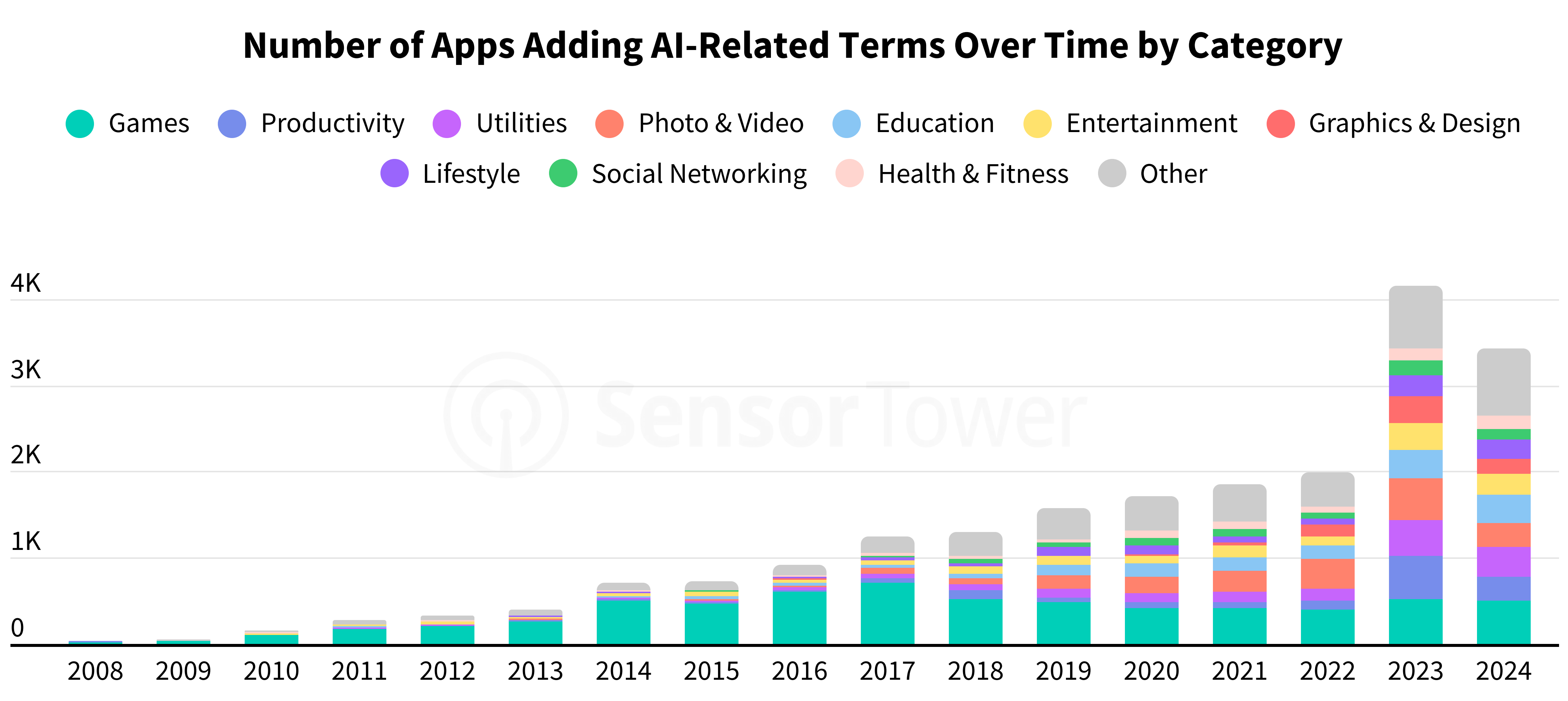
App developers were quick to respond to interest in AI in 2023, and the number of apps adding AI-related terms to their app names or descriptions more than doubled compared to 2022. This included new apps released in 2023 with these AI-related terms as well as apps updating their name or description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

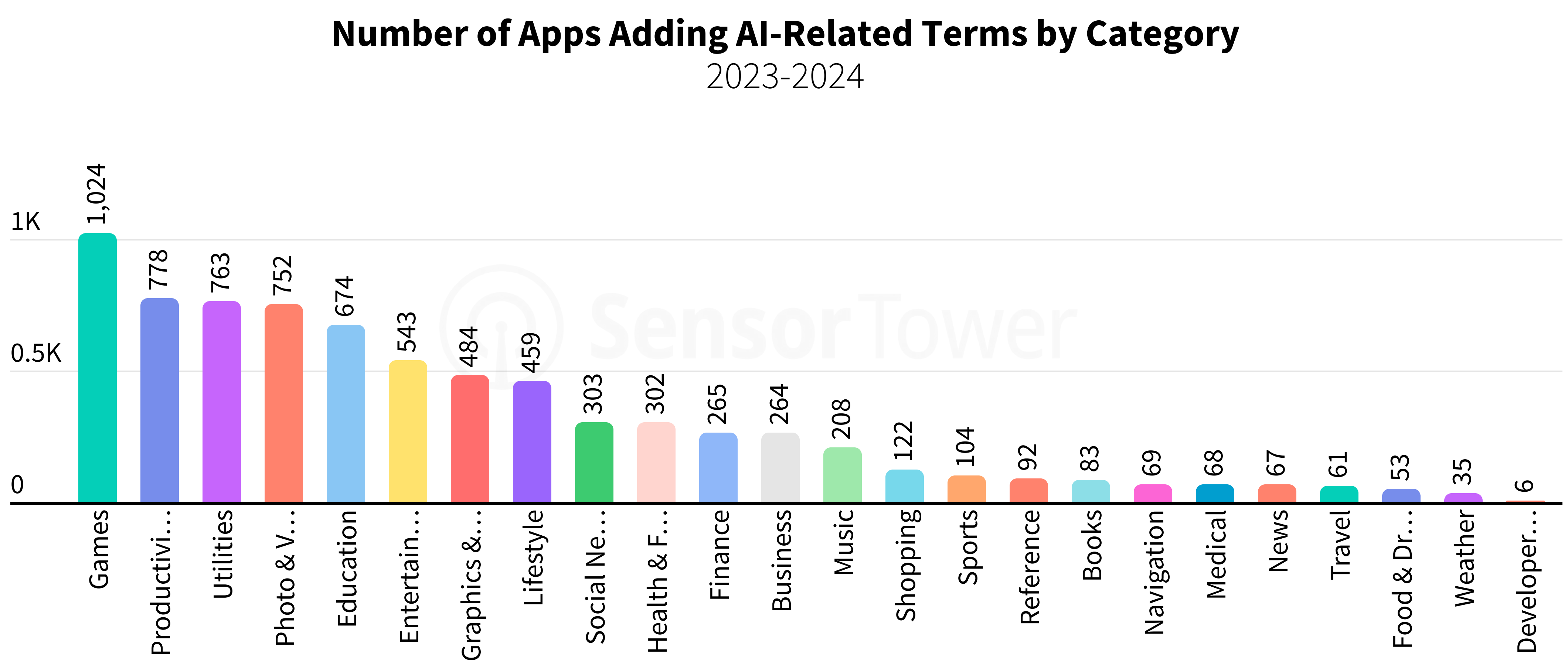
The number of apps adding AI-related terms declined in 2024, but interest remained high. More than 3,000 apps mentioned AI for the first time in 2024.

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

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

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



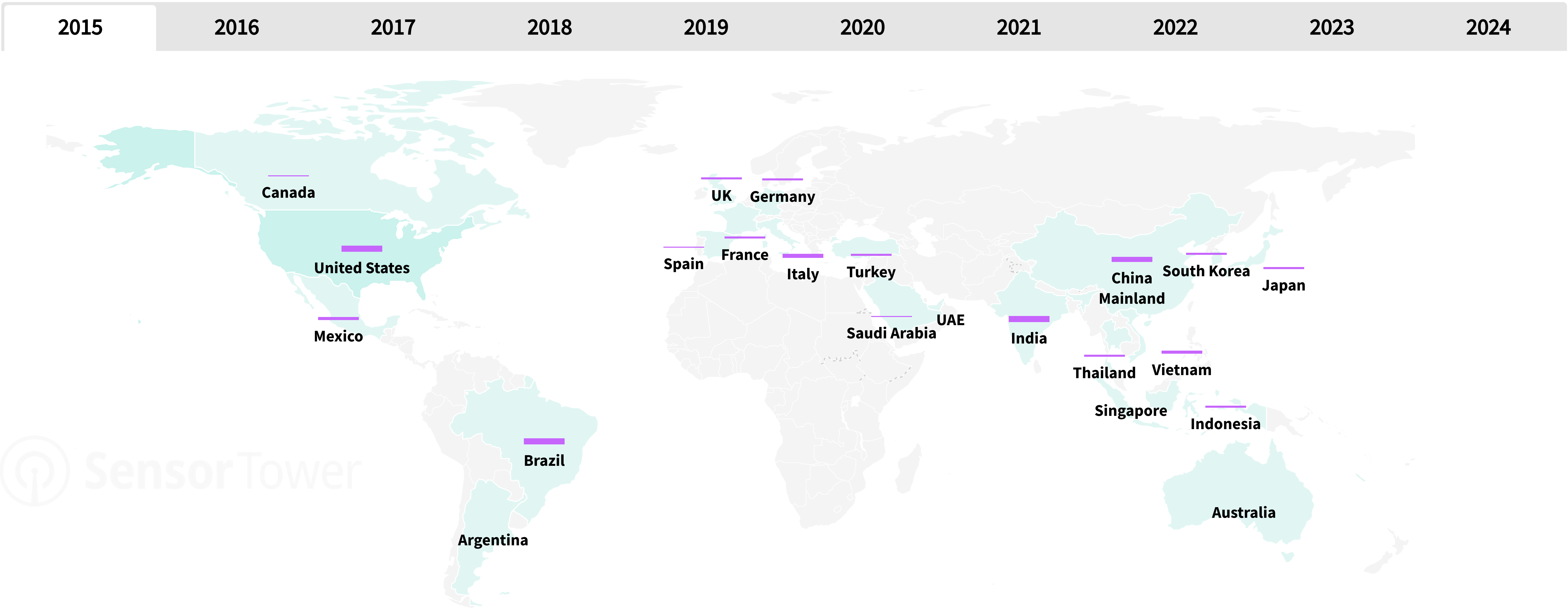


Apps Mentioning AI Were Downloaded 17 Billion Times in 2024

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

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

Downloads for Apps Mentioning AI Over Time by Market



Stay Ahead of Competitors with AI Innovations

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

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

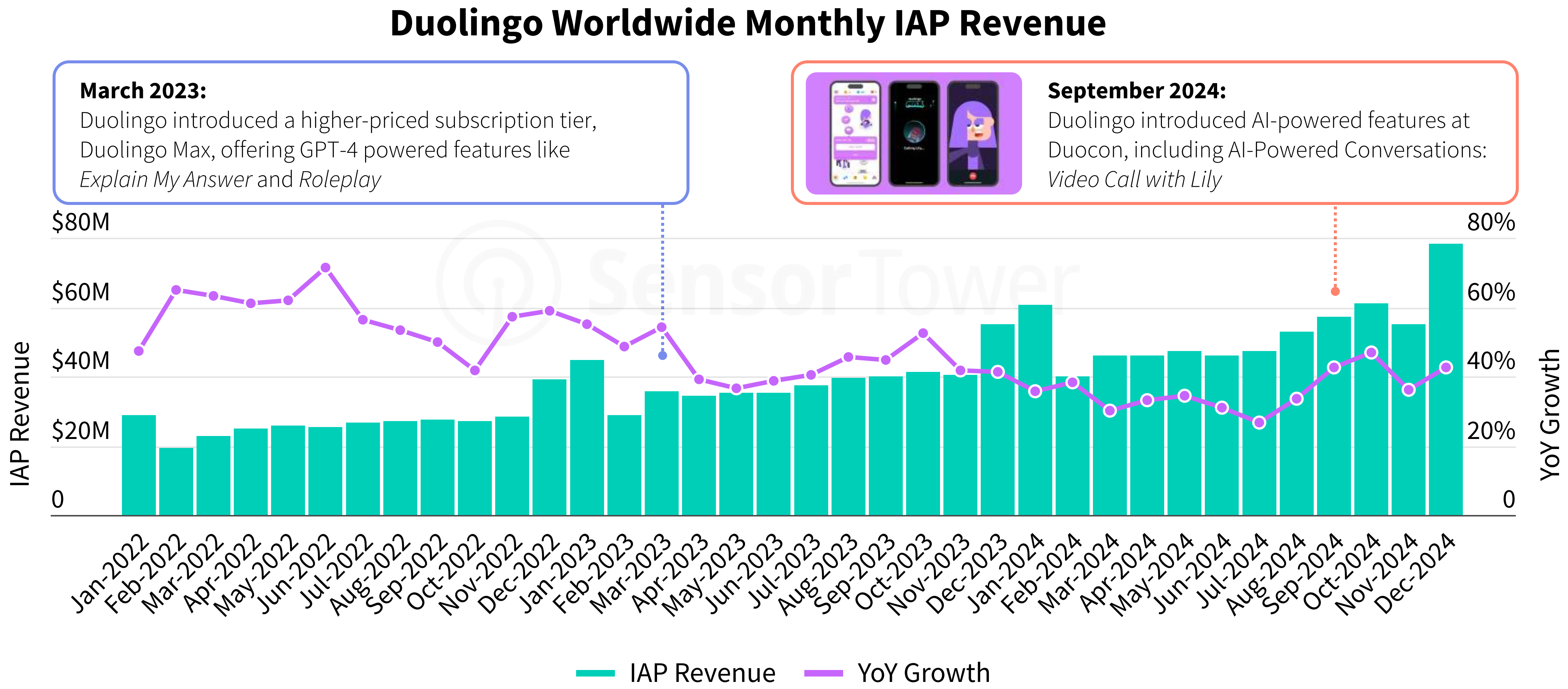
Duolingo took a significant step forward by launching AI-powered video calls in September 2024. This new feature received positive feedback from users, highlighting its effectiveness in enhancing language practice through simulated real-life conversations and leaning on positive sentiment about a character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

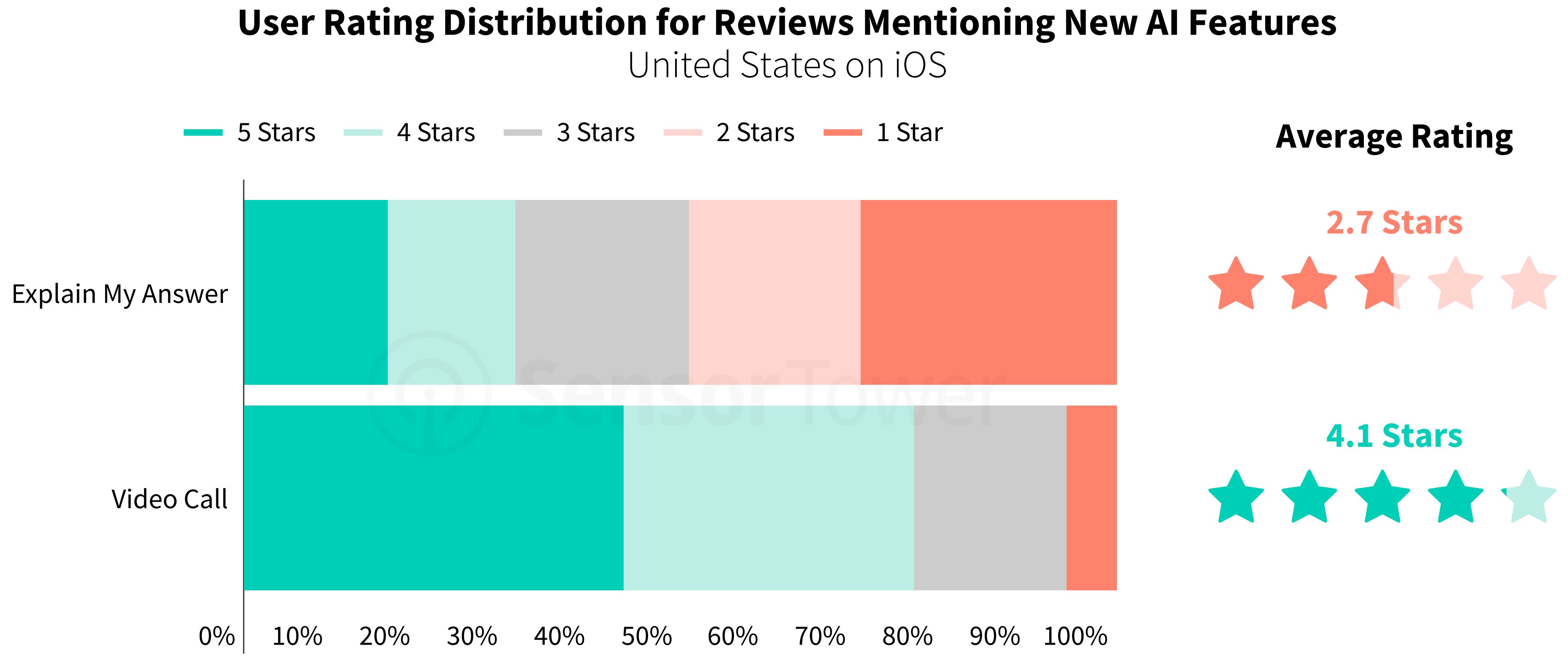
Discover How Users React to New Features

Review Analysis from Sensor Tower's App Performance Insights lets you search reviews by keyword

Source: Sensor Tower

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





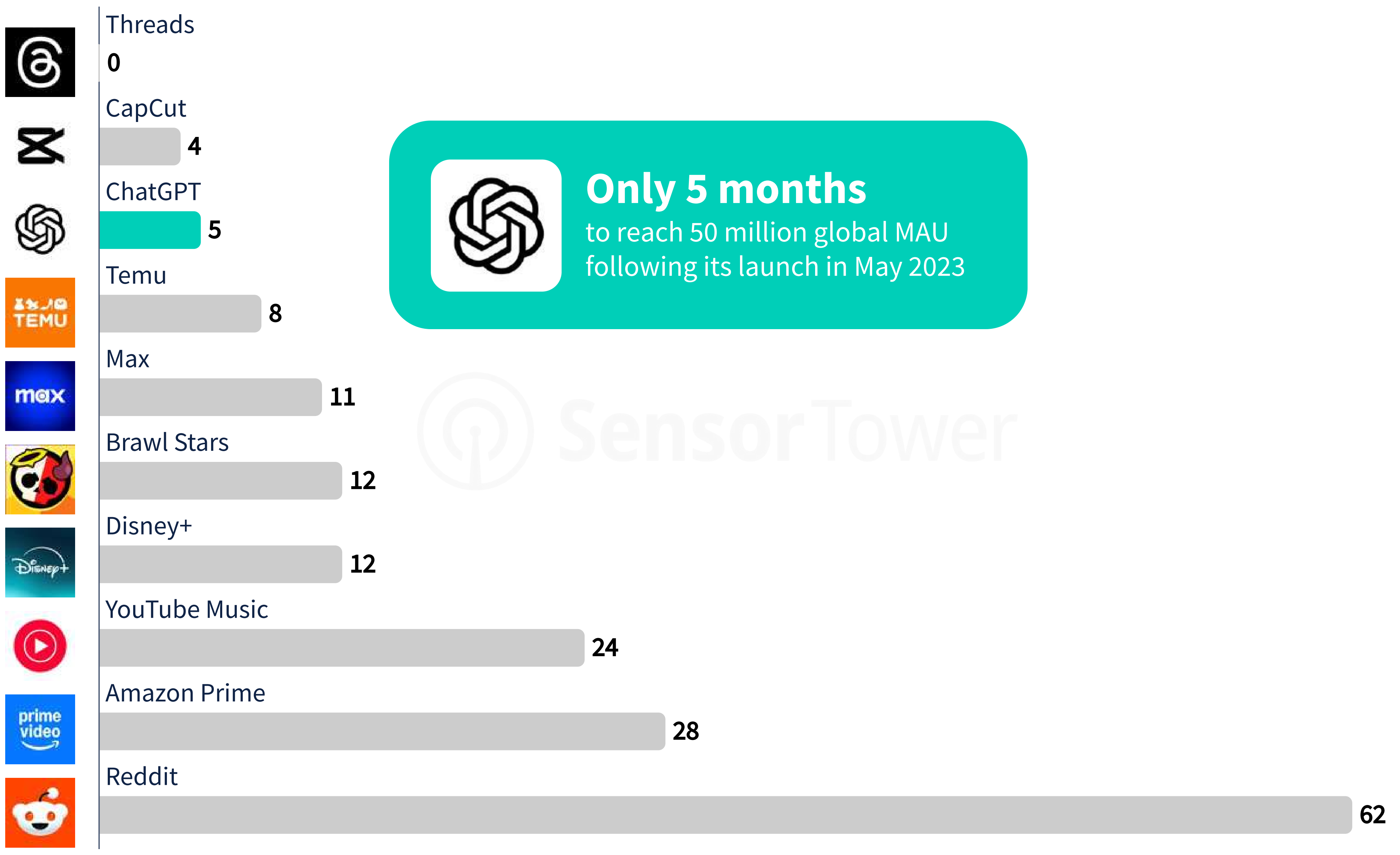
ChatGPT Reached 50 Million MAU Milestone Faster than Temu, Disney+, and YouTube Music

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

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

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

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



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

AI on Mobile

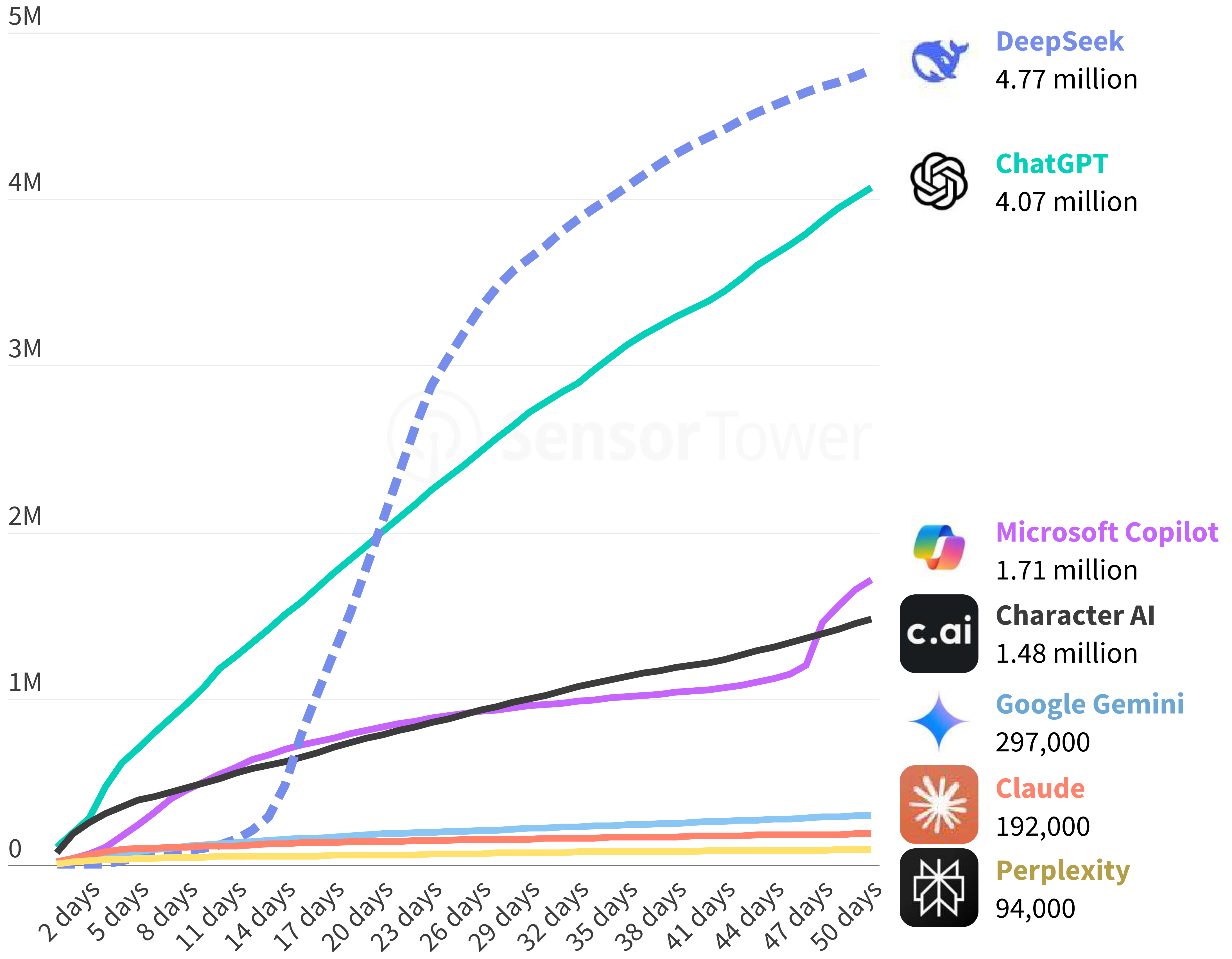
How Does DeepSeek's Launch Compare to Other Top AI Apps?

DeepSeek's early success has rivaled that of ChatGPT in the United States. Despite getting off to a slower start in the country, DeepSeek quickly closed the download gap, with both surpassing 4 million downloads in their first 50 days. It's worth noting that ChatGPT launched on iOS only in the US before launching on Google Play several months later.

ChatGPT has had a several year head start on competitors like DeepSeek, and has managed to monetize its large user base. It's yet to be seen how DeepSeek will build on its meteoric rise.

Source: Sensor Tower
Note: iOS and Google Play combined.

Cumulative United States Downloads in the First 50 Days Following Launch for Top AI Chatbot Apps



2024 Rankings by Market | AI on Mobile

AMER - Downloads

	Worldwide	United States	Canada	Mexico	Brazil	Argentina
1	ChatGPT (AI Chatbots)	ChatGPT (AI Chatbots)	ChatGPT (AI Chatbots)	ChatGPT (AI Chatbots)	ChatGPT (AI Chatbots)	ChatGPT (AI Chatbots)
2	Google Gemini (AI Chatbots)	Microsoft Copilot (AI Chatbots)	Google Gemini (AI Chatbots)	Google Gemini (AI Chatbots)	Luzia: Your AI Assistant (AI Chatbots)	Luzia: Your AI Assistant (AI Chatbots)
3	Doubao (AI Chatbots)	Google Gemini (AI Chatbots)	Microsoft Copilot (AI Chatbots)	Nova - AI Chatbot (AI Chatbots)	Google Gemini (AI Chatbots)	Nova - AI Chatbot (AI Chatbots)
4	Microsoft Copilot (AI Chatbots)	Talkie: Soulful AI, AI Friend (AI Chatbots)	Talkie: Soulful AI, AI Friend (AI Chatbots)	Poly.AI - Create AI Chat Bot (AI Chatbots)	Nova - AI Chatbot (AI Chatbots)	Google Gemini (AI Chatbots)
5	Nova - AI Chatbot (AI Chatbots)	Poly.AI - Create AI Chat Bot (AI Chatbots)	ChatOn (AI Chatbots)	Talkie: Soulful AI, AI Friend (AI Chatbots)	Poly.AI - Create AI Chat Bot (AI Chatbots)	Chatbot AI & Smart Assistant (AI Chatbots)

Download data

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

04

Productivity & Utilities

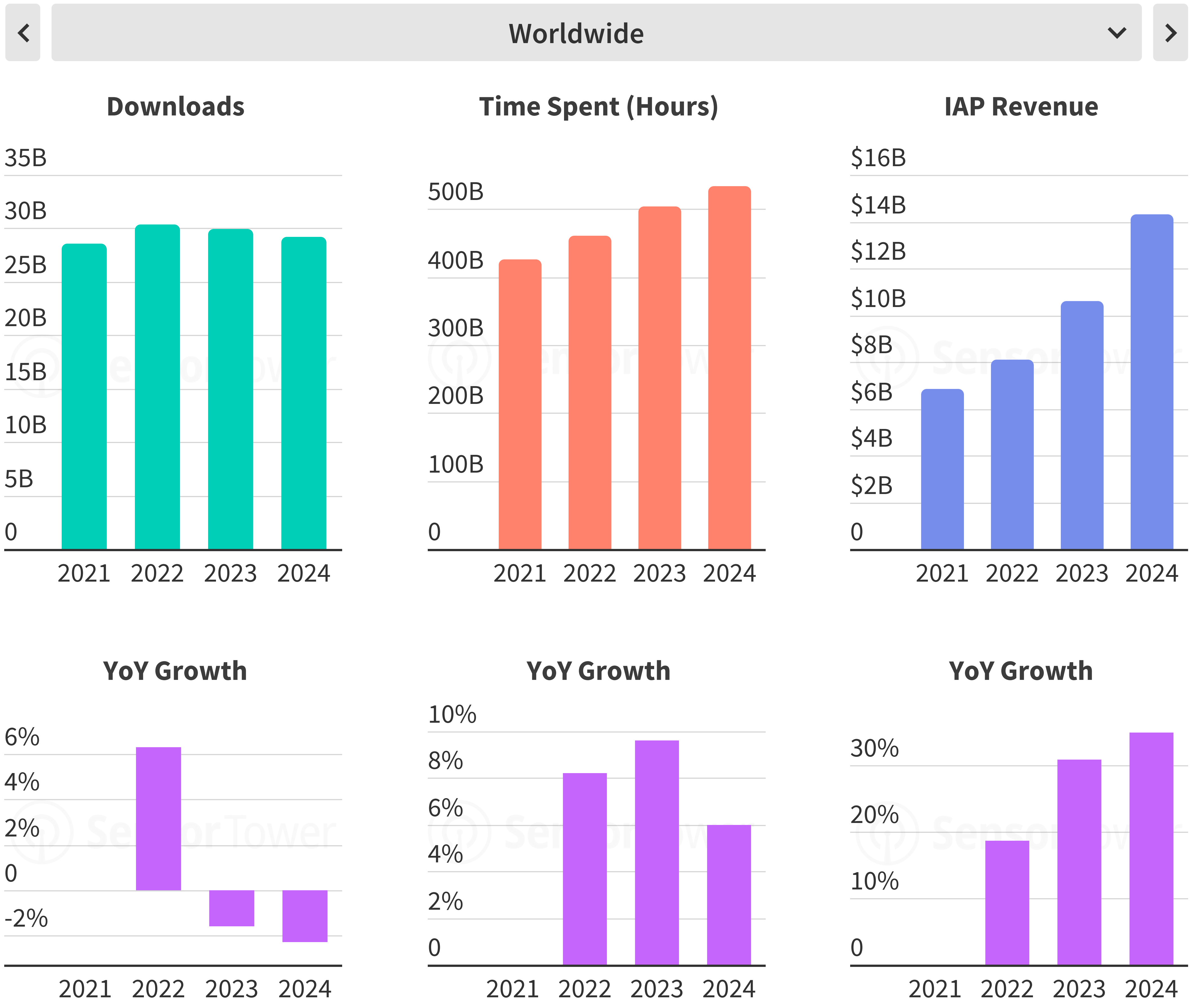
As mobile devices have become more and more integrated into people's daily lives, people naturally turn to their phones for their day-to-day needs. AI has only accelerated consumer desire to boost productivity, and mobile apps help provide solutions from AI Chatbots to File Management to PDF Editors.

Productivity & Utility App Revenue Soared in 2024, Boosted by AI

Despite declining downloads, consumer spend in Productivity & Utilities apps has only accelerated in recent years. IAP revenue for the category approached $15 billion in 2024, up a staggering 35% YoY. This was even higher than the 31% YoY growth seen in 2023 as interest in AI has boosted the revenue potential for the category.

Recent download growth from AI Chatbot apps has been offset by declining downloads from some of the largest subgenres in Productivity & Utilities, including Antivirus & VPN and File Management. The declines were largely isolated to Google Play and were likely related to updated data privacy requirements on the platform.Time spent in these apps has continued to see solid growth, suggesting that their is still plenty of demand for these apps.

Yearly Trends for Productivity & Utilities Apps



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

Utilities Apps were Downloaded Nearly 14 Billion Times Globally in 2024

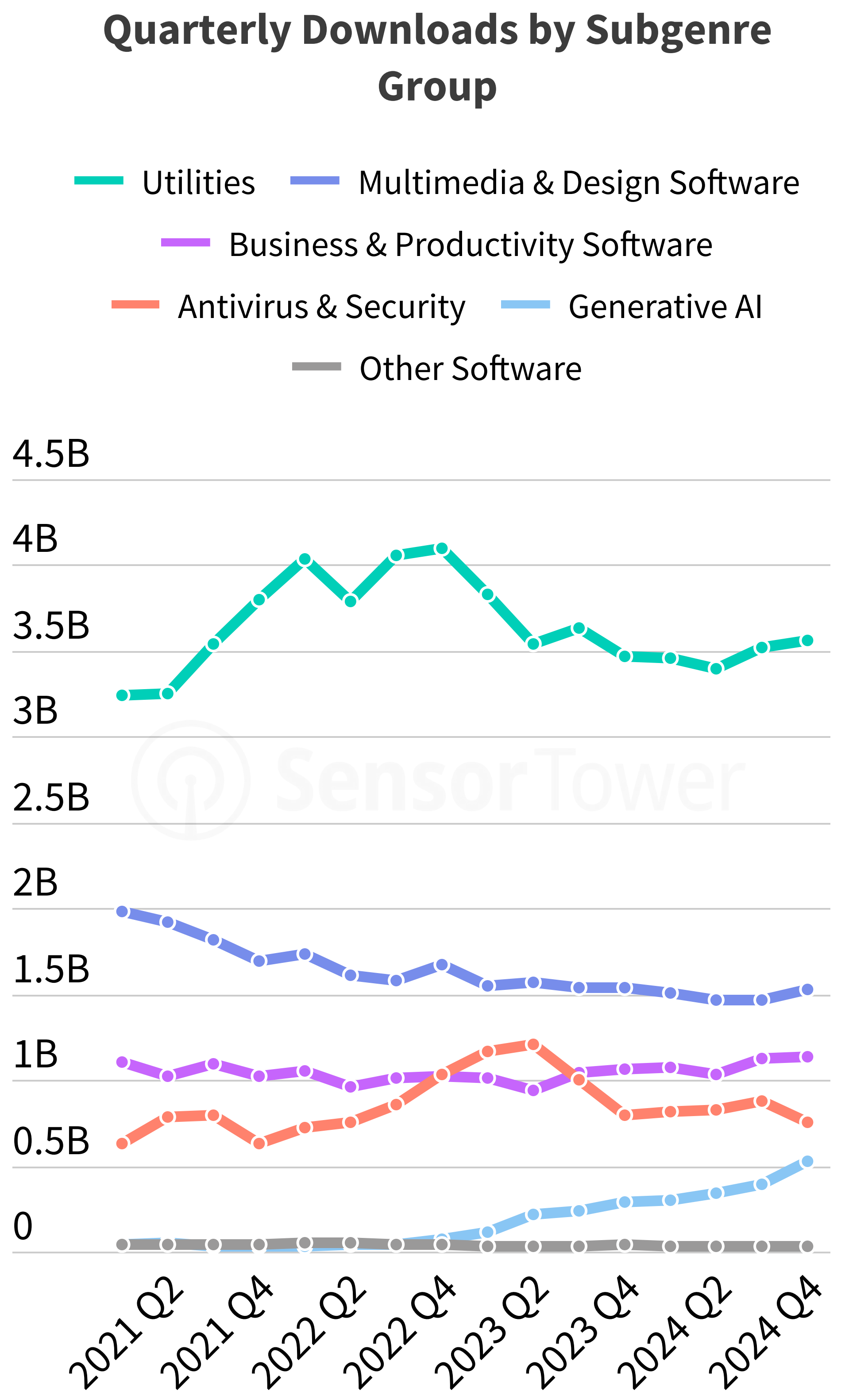
Utilities subgenres accounted for nearly half of the downloads in the Productivity & Utilities genre. Example top apps included Truecaller (Calling & SMS), Google Chrome (Browsers), SHAREit (Cloud Storage), and QR & Barcode Scanner (QR Scanners).

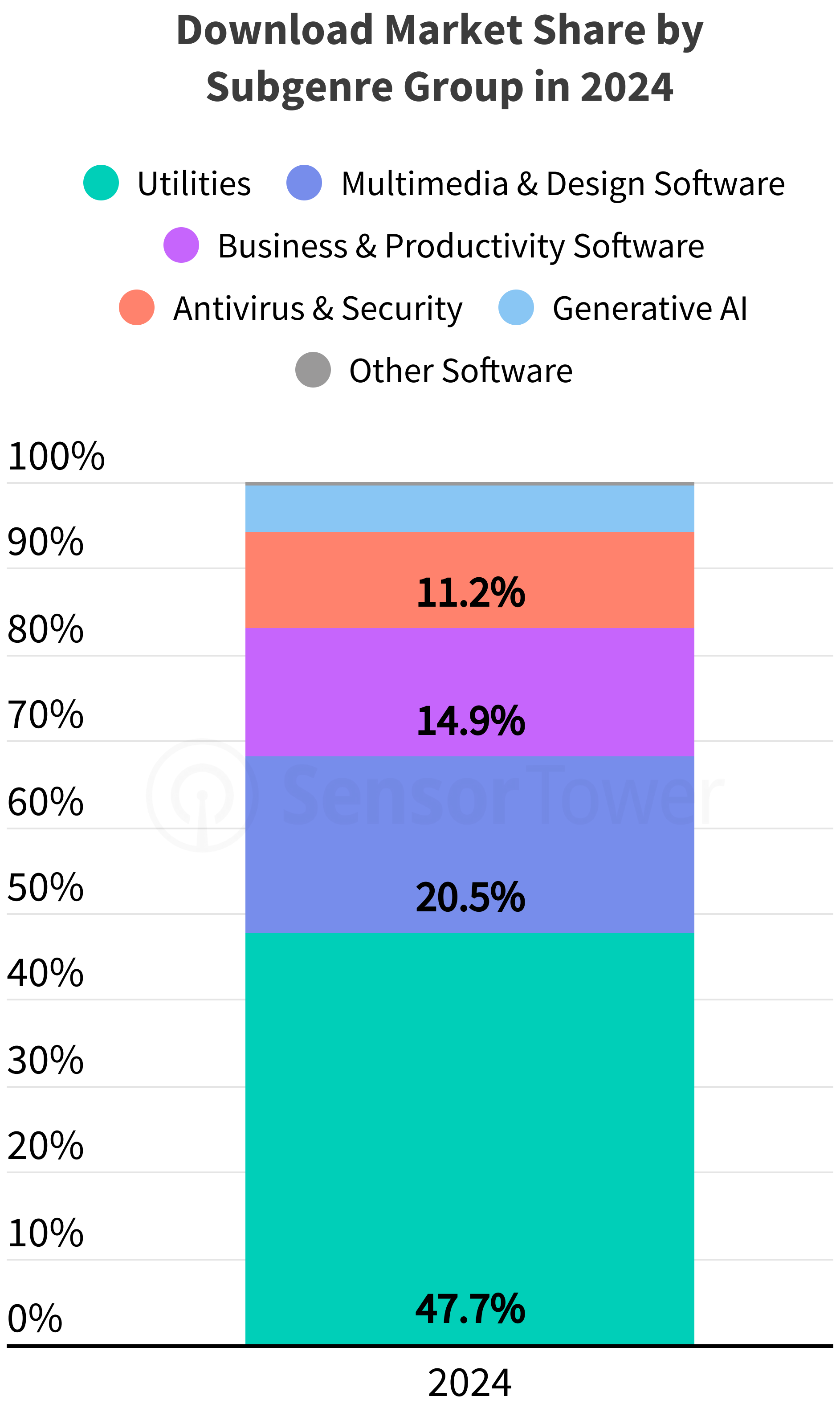
Multimedia & Design Software app downloads have declined slightly since 2021, though downloads are leveling out in recent quarters. CapCut (Video Editing), Canva (Poster & Card Design), and Remini (Photo Editing) were the top apps by global downloads in 2024. These apps are feeling competition from Generative AI subgenres, and many have incorporated their own AI features.

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

Productivity & Utilities Download Trends by Subgenre Group

Worldwide





Productivity & Utilities

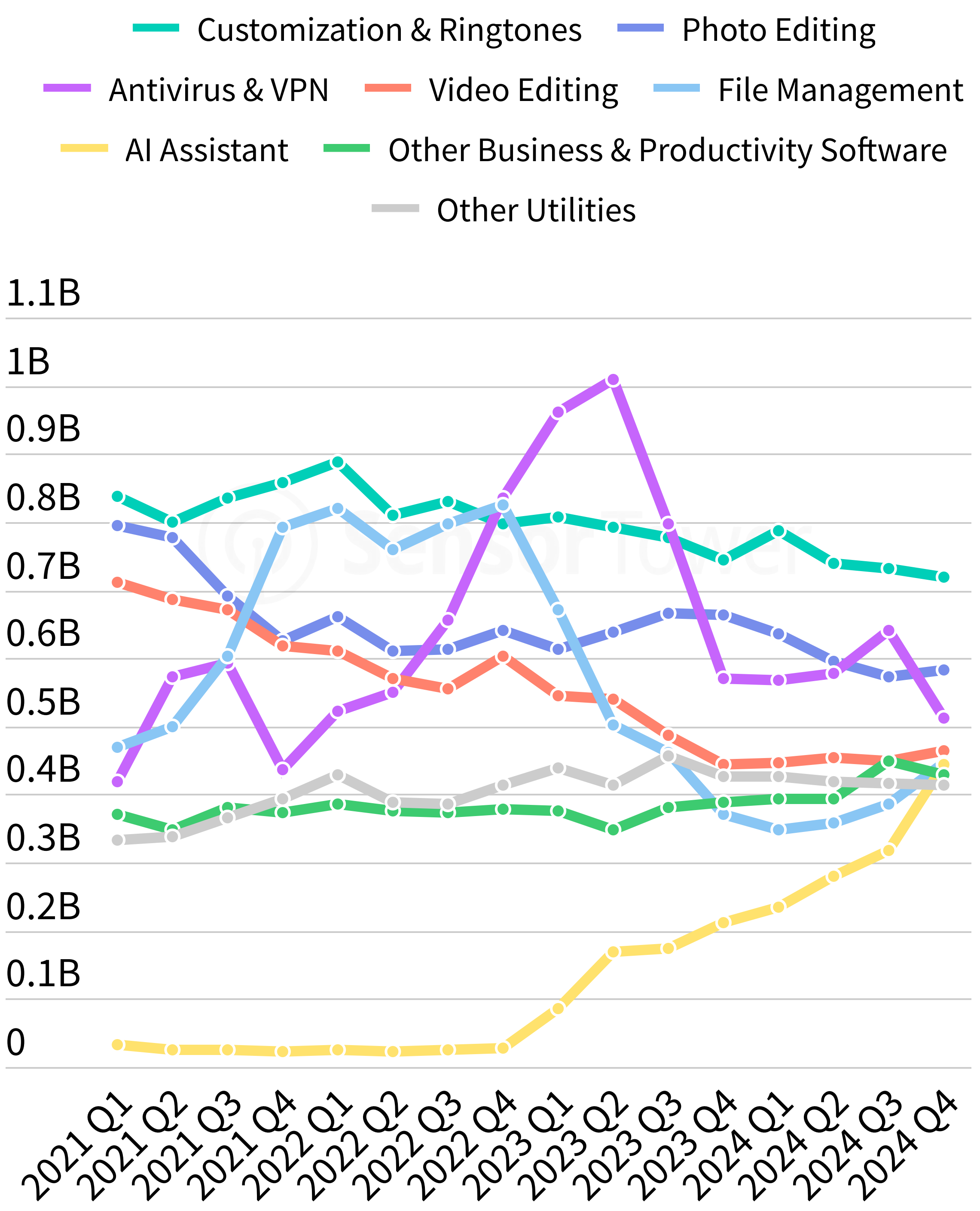
Top Productivity Genres Vary Significantly by Market

The Productivity & Utilities genre contains a wide array of different products, and as such popularity varies significantly by market. Globally, some of the top growing subgenres (besides AI Chatbots/Assistants) included PDF Editors & Docusign and Media Players.

Productivity & Utilities Download Trends by Subgenre

Worldwide

Quarterly Downloads by Subgenre



Top Apps by Downloads in 2024

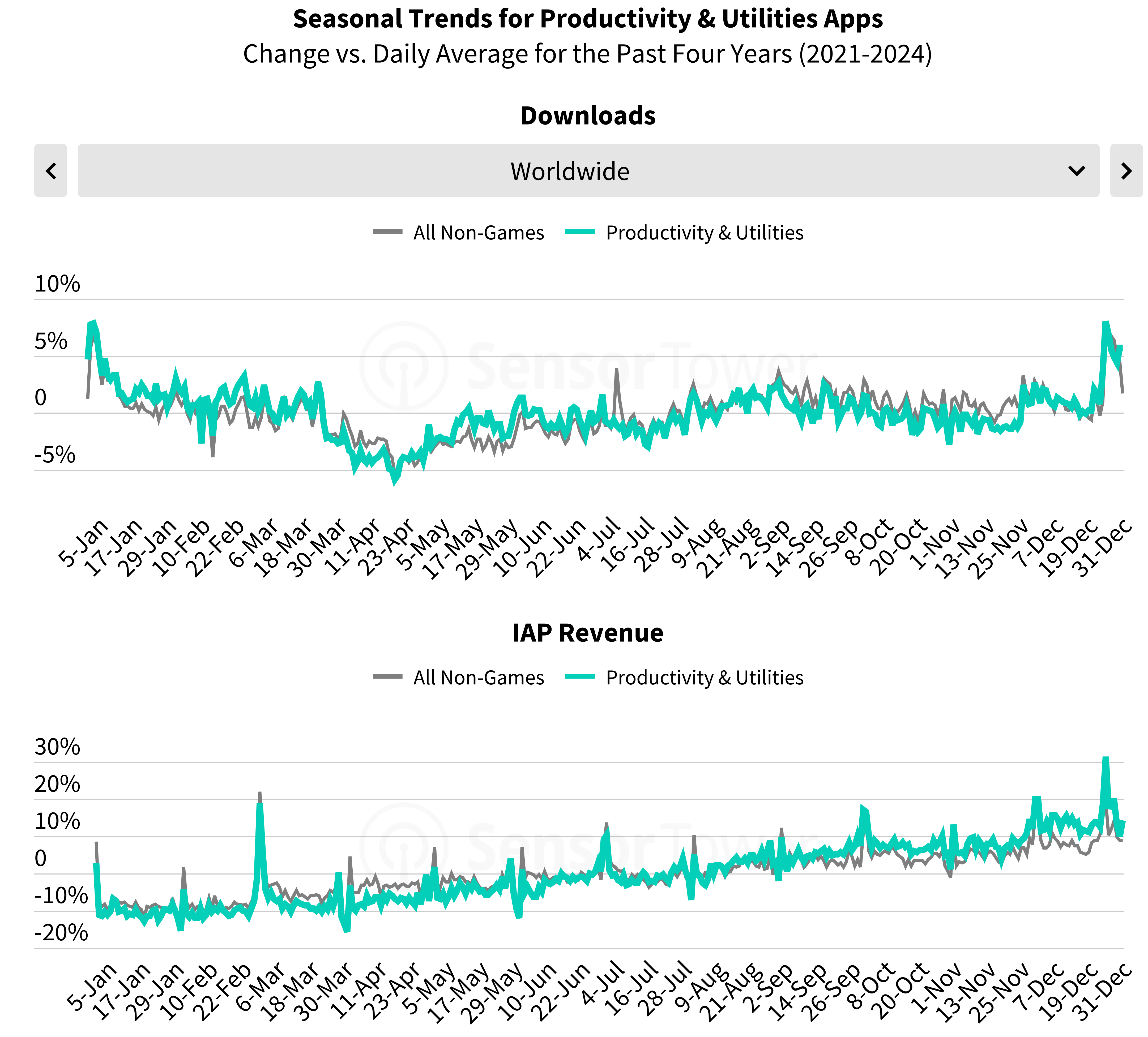
	App	Subgenre
1	CapCut	Video Editing
2	ChatGPT	AI Assistant
3	WhatsApp Business	Other Business & Productivity Software
4	Truecaller	Calling & SMS
5	Canva	Poster & Card Design
6	Remini	Photo Editing
7	PDF Reader	PDF Editors & Docusign
8	Google	Browsers
9	Zoom Workplace	Business Communication
10	SHAREit	Cloud Storage

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

Christmas Through January is Peak Season for Productivity Apps

Since Productivity & Utilities apps tend to be useful year round, seasonal downloads and IAP revenue trends are pretty close to the non-game market overall. In the US, demand spikes around Christmas, the time when the most consumers get new phones and download all of the apps they need most including Browsers, Email, and Utilities apps.

Increased demand for Productivity & Utilities apps in the US remains high throughout January as people continue to find the apps they need for their new devices and get themselves organized for the new year.



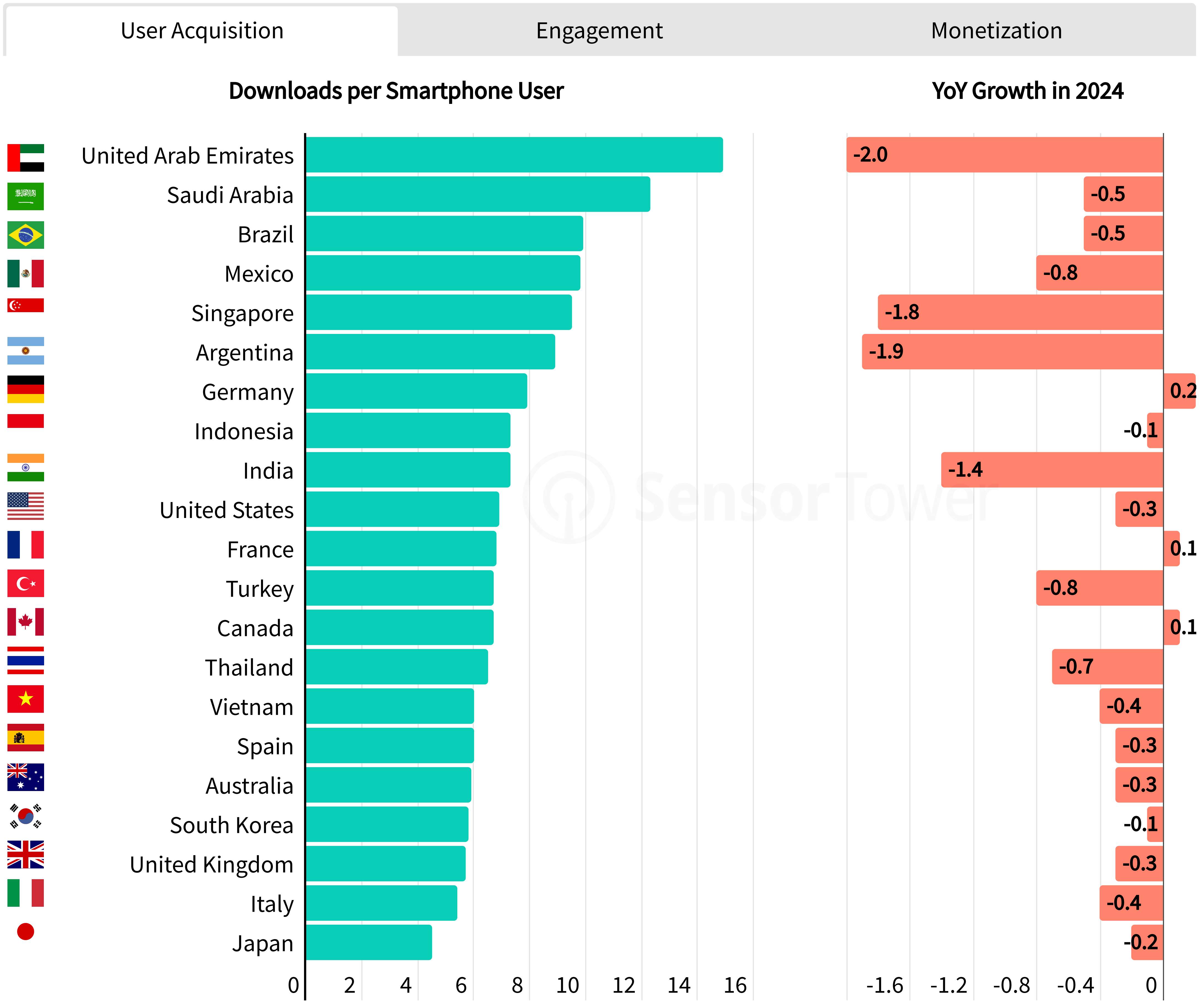
Source: Sensor Tower
Note: iOS and Google Play combined. iOS only for China. Excludes third-party Android. Apps classified using Sensor Tower's taxonomy as of January 5, 2025.

Productivity Monetization Improves Across Regions Despite Saturation for New Downloads

Average revenue per app user surpassed $2 in three markets in 2024 (Australia, the US, and the UK). Per user monetization in Australia and the UK in particular saw rapid growth, climbing 37% and 32% YoY, respectively. Nearly every other top market also saw ARPU increase YoY.

In contrast, the number of new downloads per smartphone user declined in most markets in 2024. Germany, France, and Canada were the exceptions, achieving modest YoY growth.

Productivity & Utilities App Performance by Market



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

Productivity Apps Look to Australia and Western Europe for Growth

The US, Singapore, and the UAE were top markets for Productivity apps in 2024. The US led the way for monetization, while the UAE was a top market for adding new users. Singapore had fairly strong performance across user acquisition, engagement, and monetization metrics.

When looking for the markets that show the highest growth potential, Australia and the UK stand out given their rapid revenue growth. Germany, France, and Italy were also among the breakout markets in 2024 with relative improvements in user acquisition and engagement.

Source: Sensor Tower
Note: iOS and Google Play combined. All country-level figures are normalized by estimates for the number of smartphones in each country. Input variables include downloads per smartphone user (User Acquisition), time spent per smartphone user (engagement), and IAP revenue per unique app-user combination (monetization). Scores are calculated using Z-scores for each metric across the included countries, and rescaled so that scores are between 1 and 5, with a mean of 3. Overall scores are calculated as the weighted average of the three scores (50% monetization, 30% user acquisition, and 20% engagement). Apps classified using Sensor Tower's taxonomy as of January 5, 2025 and excludes Generative AI.

Productivity & Utilities App Market Scores

Scores Between 1-5 Based on Relative Productivity & Utilities App Performance in Each Market

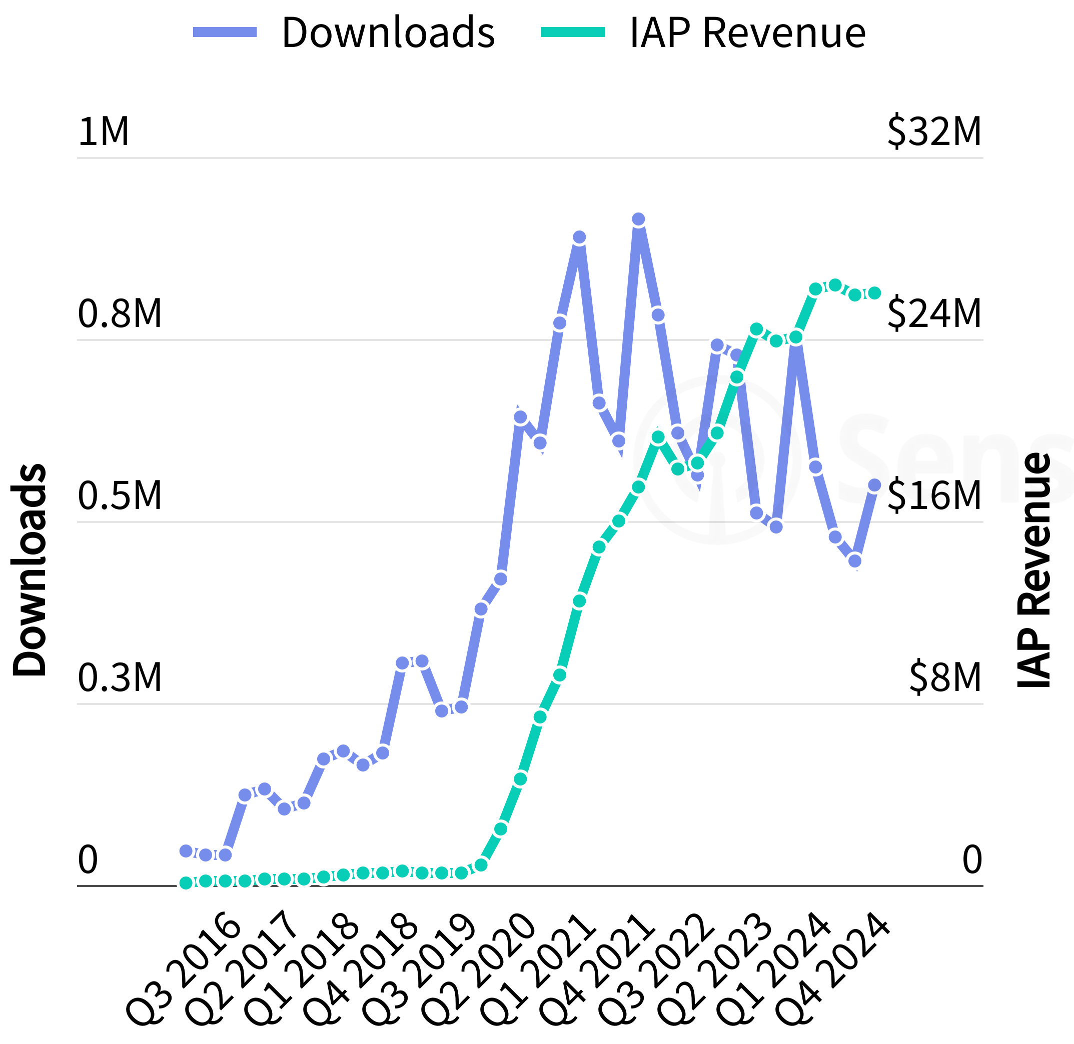
Productivity & Utilities

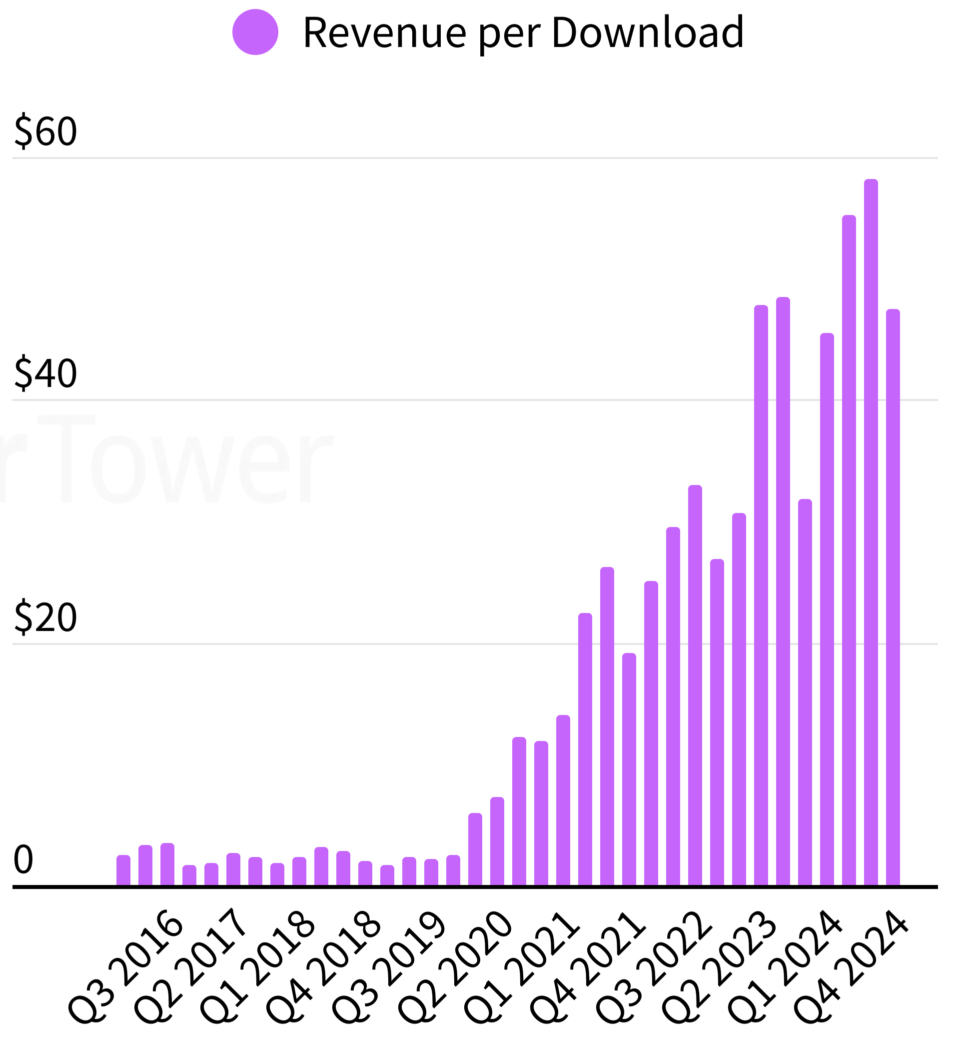
Cricut Pivots from Individual Creativity to Bringing People Together

Like many Multimedia & Design Software apps, Cricut saw a huge boost at the start of the COVID-19 pandemic with many people looking for new hobbies while they were stuck at home. In the following years, Cricut primarily focused on promoting its different design tools and use cases with its printers for individual crafting.

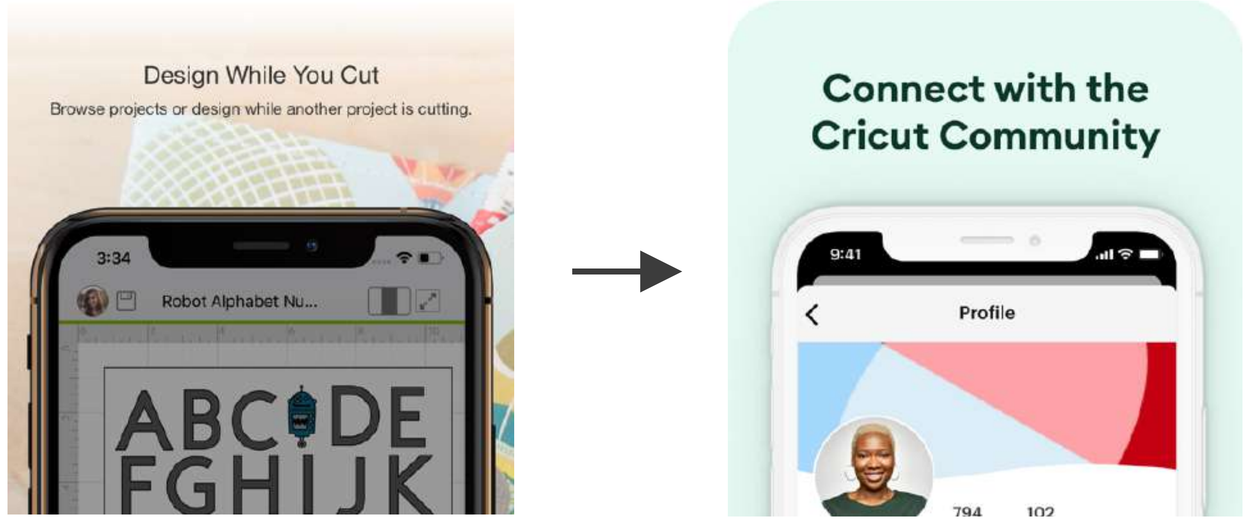
Unsurprisingly, Cricut's downloads have declined over the past few years as the world re-opened. In spite of this, Cricut has managed to continue to boost revenue by leaning into the power of communities in crafting. Cricut included more social features, allowing users to follow and interact with creators.

Cricut Design Space Worldwide Downloads and IAP Revenue





November 2021:
Cricut Design Space began emphasizing its community in addition to design tools



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

Cricut Promotes its Tools to Connect with Friends and Family

Cricut's ad campaigns have revealed another shift to connecting people, both on the app and "in real life" (IRL). Example recent ad creatives depict using the printing tools to make a party theme with friends, design a graduation cap, create wedding table numbers, and enhance various other in-person celebrations.

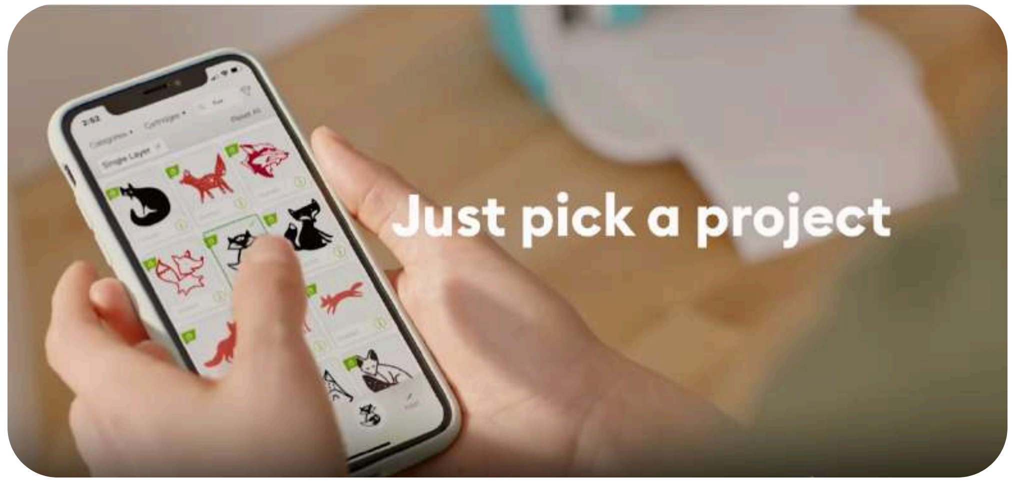
For comparison, Cricut's earlier ad creatives promoted its design tools or used celebrities like Zooey Deschanel to promote creating greeting cards.

Dive Deeper into Advertising with Pathmatics
Current Pathmatics customers can explore more Cricut digital ad creatives here. Interested in Digital Advertising Insights? Check out Pathmatics by Sensor Tower!

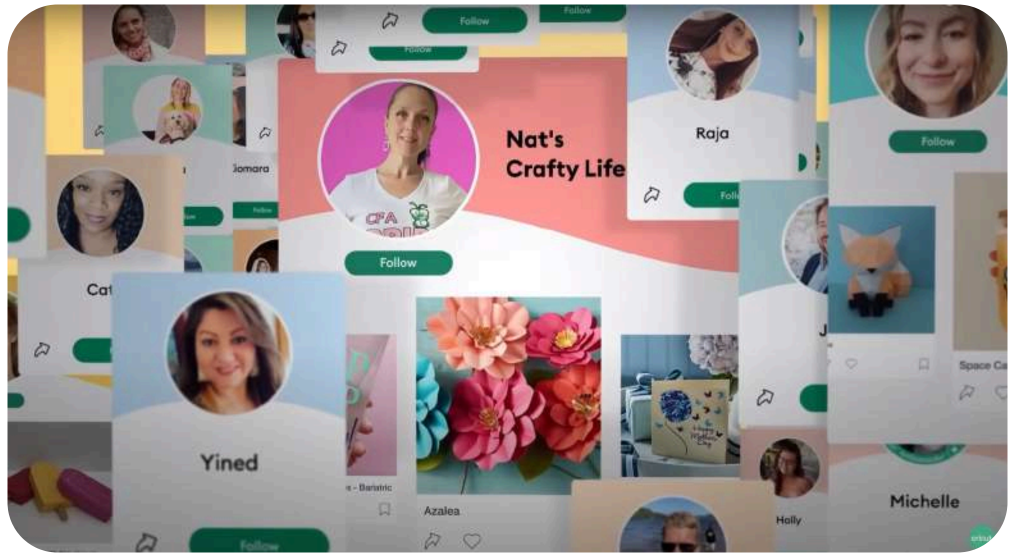
Source: Sensor Tower

Example Cricut Ad Creatives

Top Creatives on YouTube from 2021 - 2022



Top Creatives on YouTube from 2024



2024 Rankings by Market | Productivity & Utilities

AMER - Downloads

	Worldwide	United States	Canada	Mexico	Brazil	Argentina
1	CapCut (Video Editing)	ChatGPT (AI Assistant)	ChatGPT (AI Assistant)	CapCut (Video Editing)	CapCut (Video Editing)	CapCut (Video Editing)
2	ChatGPT (AI Assistant)	CapCut (Video Editing)	CapCut (Video Editing)	ChatGPT (AI Assistant)	PDF Reader (PDF Editors & Docusign)	ChatGPT (AI Assistant)
3	WhatsApp Business (Other Business & Productivity Software)	Google (Browsers)	Microsoft Authenticator (2FA & Passwords)	Canva (Poster & Card Design)	ChatGPT (AI Assistant)	Canva (Poster & Card Design)
4	Truecaller (Calling & SMS)	Gmail (Email)	Microsoft Teams (Business Communication)	PDF Reader (PDF Editors & Docusign)	WhatsApp Business (Other Business & Productivity Software)	PDF Reader (PDF Editors & Docusign)
5	Canva (Poster & Card Design)	Life360 (Location Trackers)	Google (Browsers)	Lark Player (Media Players)	Canva (Poster & Card Design)	Lark Player (Media Players)

Download data

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

05 Health & Fitness

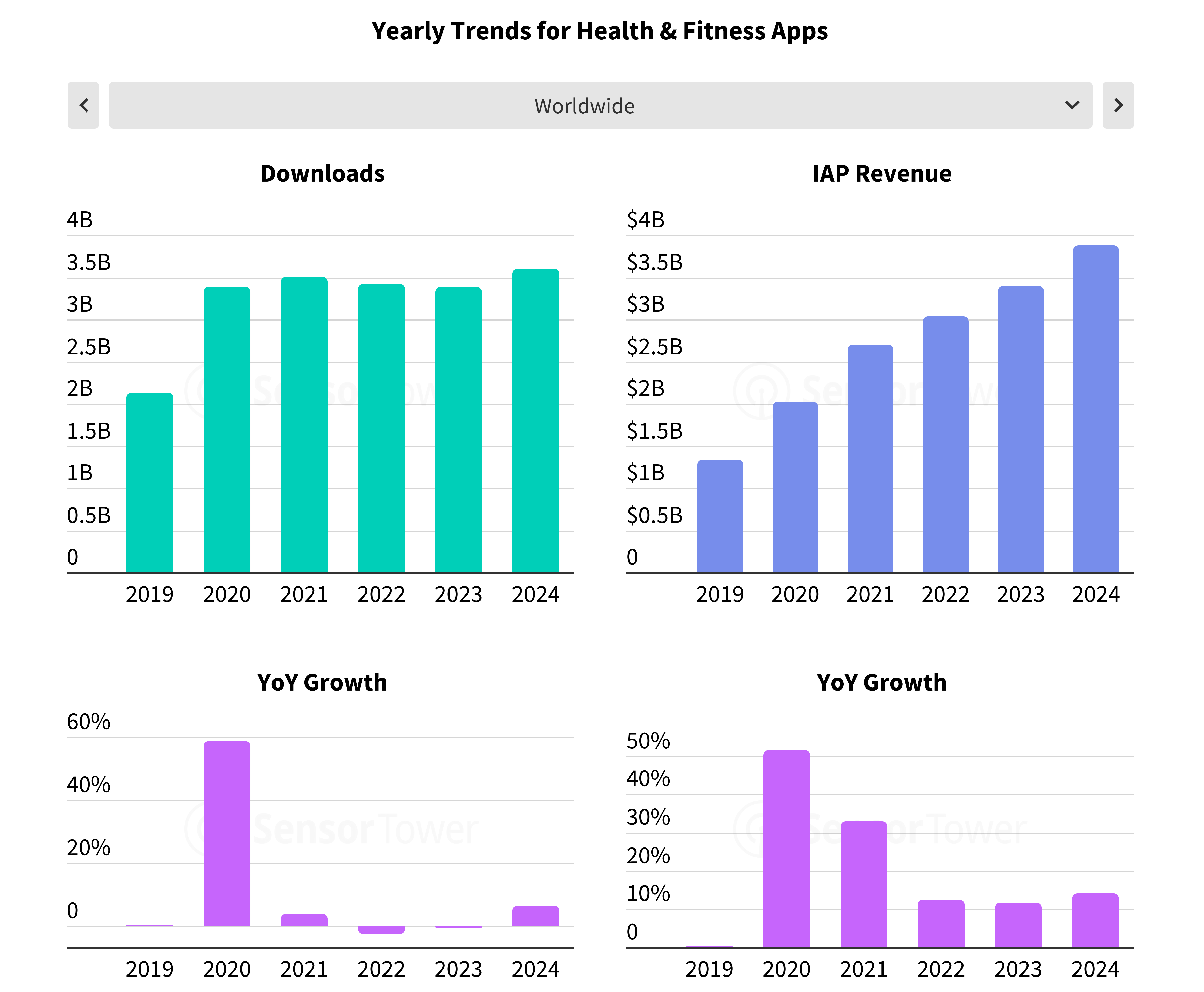
Health & Fitness apps saw a resurgent year in 2024. Consumers have embraced personalized workout and fitness apps for years — now they turn to mobile apps for personalized healthcare too.

2024 Was a Resurgent Year for Mobile Health & Fitness

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

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

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



Medical Tracking Apps See Explosive Growth

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

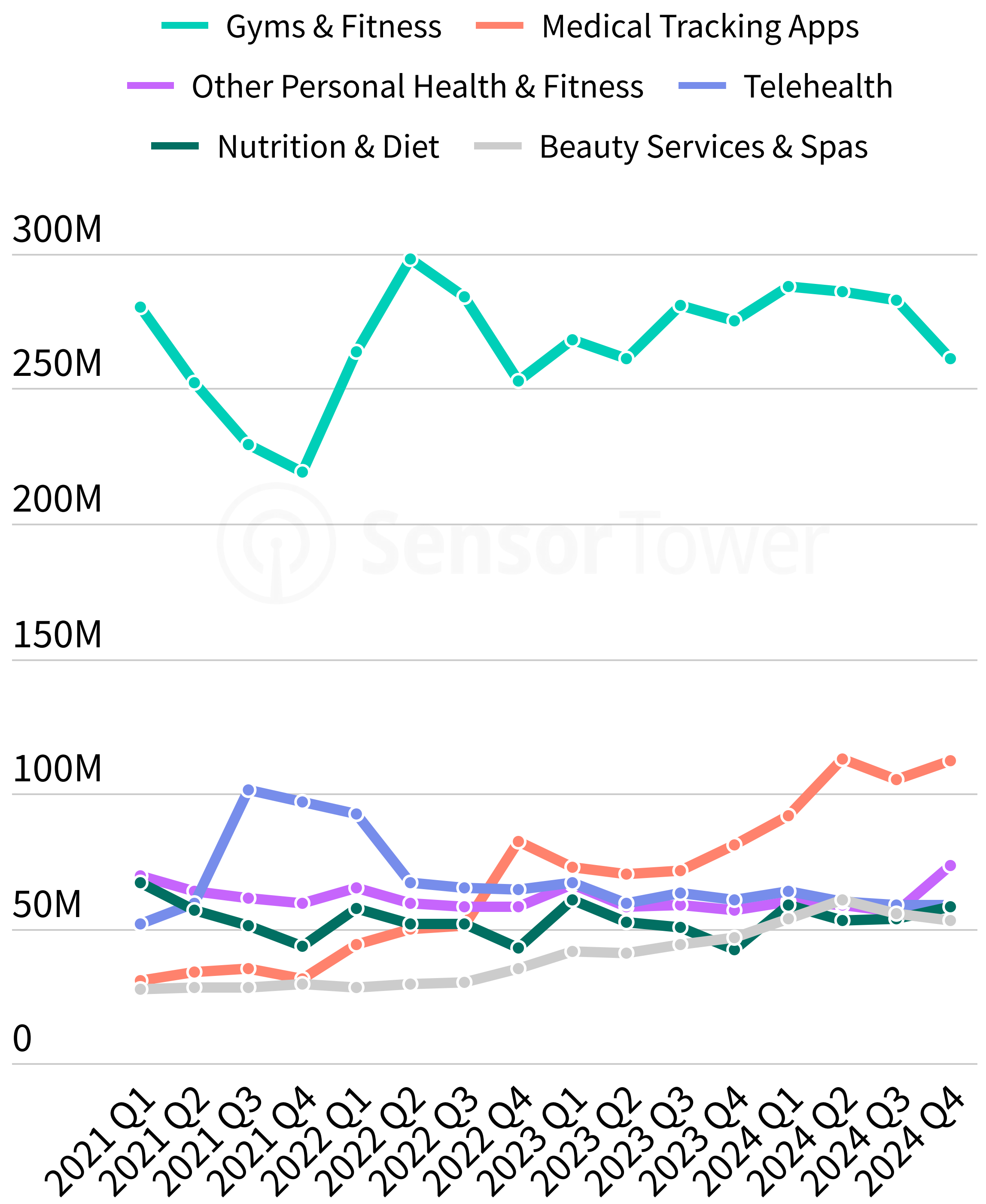
The Medical Tracking app landscape is evolving rapidly, driven by technological advancements and growing consumer awareness of personalized healthcare. In 2024, the Medical Tracking subgenre saw a remarkable 43% increase in downloads YoY. Leading this surge was Health Tracker, released at the end of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

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

Health & Fitness Download Trends by Subgenre

Worldwide

Quarterly Downloads by Subgenre



Top Apps by Downloads in 2024

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

Health & Fitness

Health & Fitness "Q5" Runs From Christmas Through January

"Q5", or the key advertising period that runs between Christmas into the early new year, provides a crucial time for apps to find their audience while demand is high. This is true to Health & Fitness apps in particular as the category historically sees a nice boost at the beginning of the year due to New Years' resolutions.

In the US, Health & Fitness downloads are typically more than 20% above their yearly average between Christmas through mid-January, and remain slightly elevated even into February. IAP revenue also tends to be higher in early January, though the impacts of adding new users is likely spread out over a longer period of time given free trials and it taking some time to convert free users into paid subscribers.

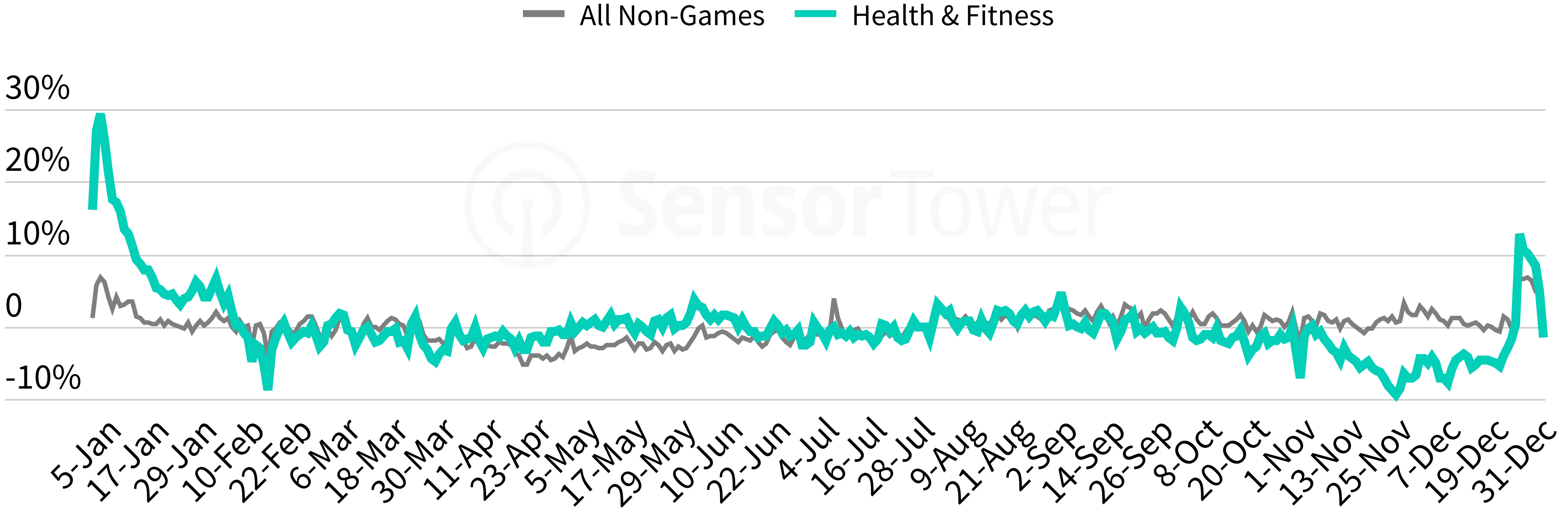
Note that the spike in revenue on February 28th is primarily due to app store billing policies (recurring monthly subscriptions purchased on the 29th-31st of a month will all be billed on the 28th for February).

Seasonal Trends for Health & Fitness Apps

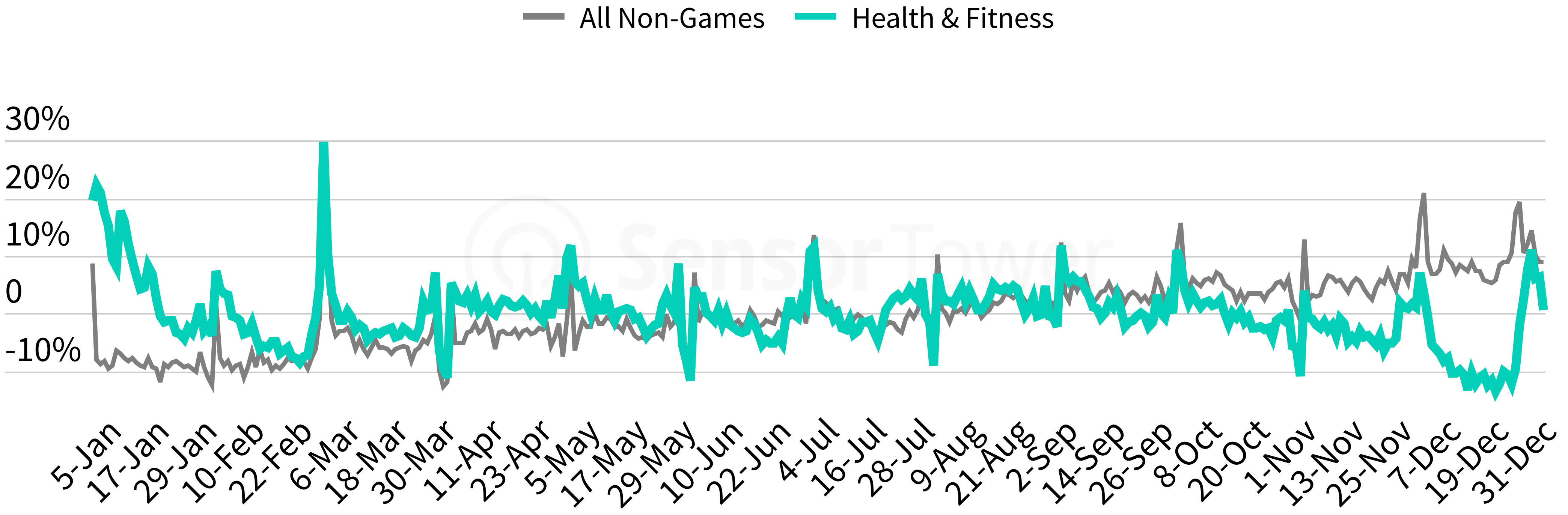
Change vs. Daily Average for the Past Four Years (2021-2024)

Downloads

Worldwide



IAP Revenue



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

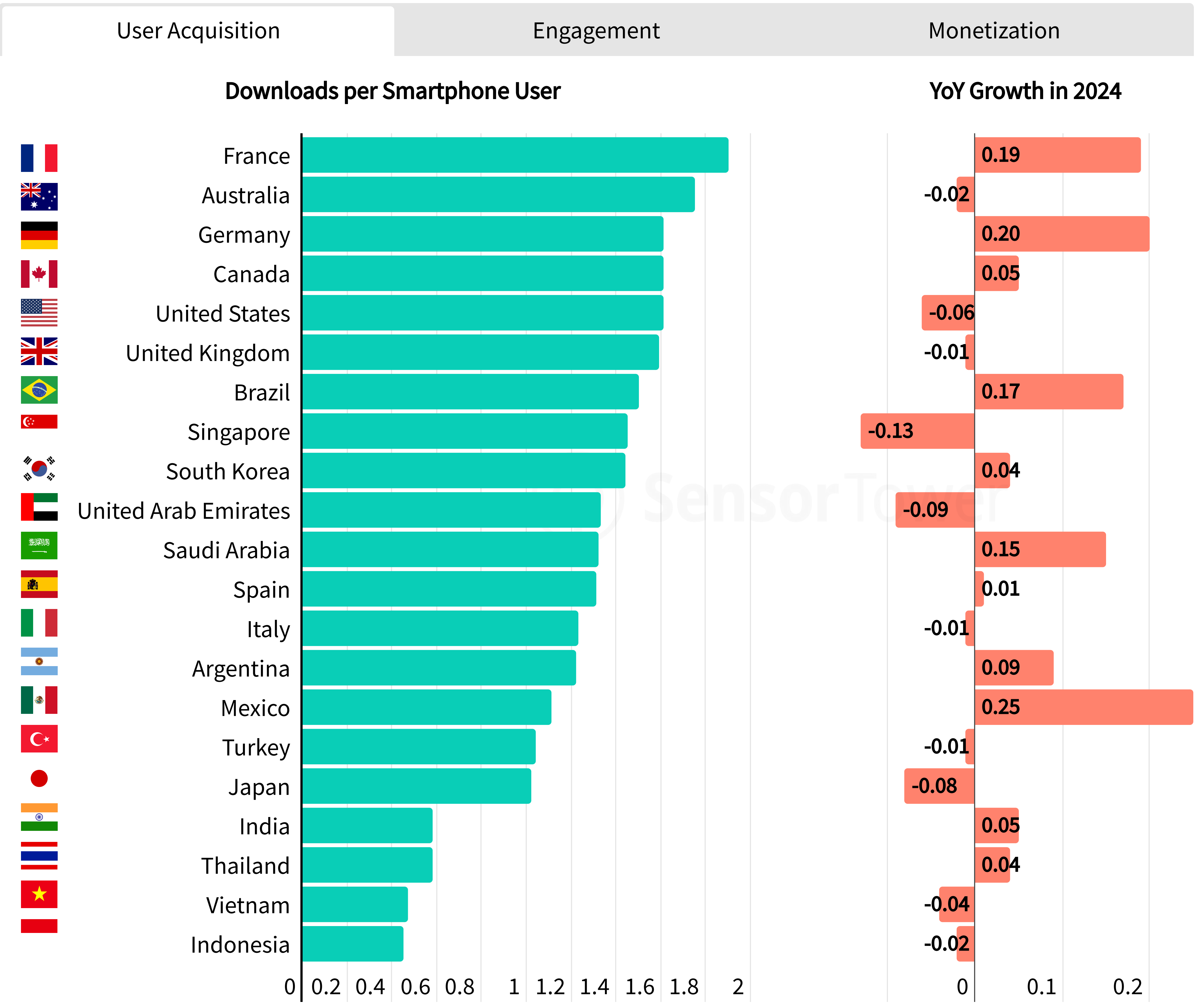
North America, Europe, and Australia are the Market Leaders for Health & Fitness

Health & Fitness apps are very popular in several markets across North America, western Europe, and Oceania. Among the included markets, the US, Canada, and Germany rank among the top five for user acquisition, engagement, and downloads (adjusted for the number of smartphone users in each market). Australia ranks second for both downloads per smartphone user and average revenue per Health & Fitness app user. Meanwhile, France ranked #1 for user acquisition and #2 for engagement.

Every included market except for Mexico saw average revenue per Health & Fitness app user climb YoY in 2024. Australia and Canada have narrowed the gap with the US with each averaging roughly $8 spent per each app-user combination in the year.

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

Health & Fitness App Performance by Market



Health & Fitness

Australia is a Top Market for Mobile Health & Fitness While Germany and France Provided the Most Growth

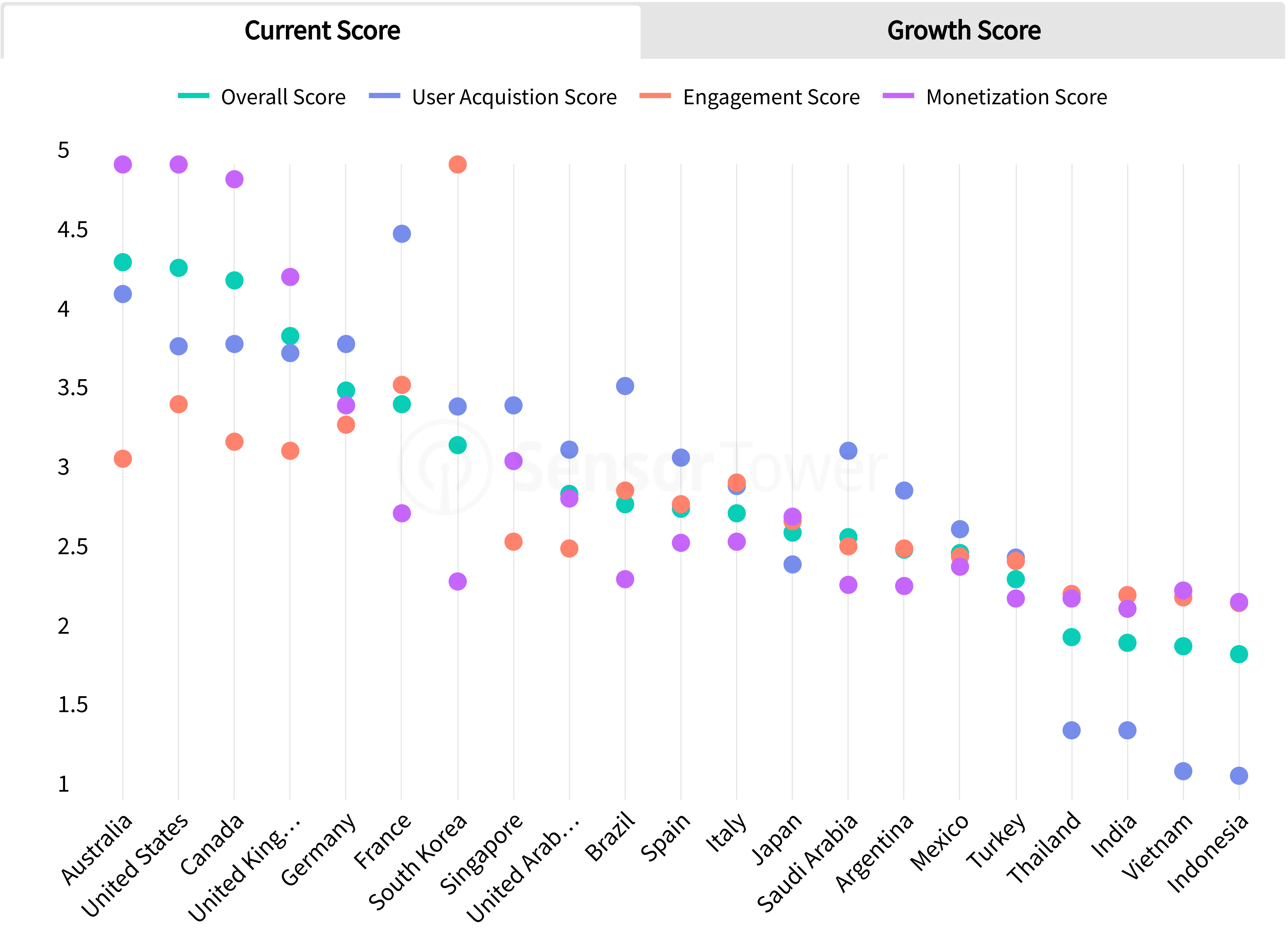
While the US will likely continue to be a key market for mobile Health & Fitness, there are signs that the market is becoming oversaturated. US downloads declined YoY and time spent achieved only modest growth. Several markets including Australia, Canada, and Germany also had higher revenue growth per user in 2024 than the US.

As a result, the markets with the highest growth scores in 2024 included Germany, Canada, France, Australia, and Brazil. The US ranked more towards the middle of the pack, while Health & Fitness apps struggled in several APAC markets including South Korea, Vietnam, Indonesia, and India.

Source: Sensor Tower
Note: iOS and Google Play combined. All country-level figures are normalized by estimates for the number of smartphones in each country. Input variables include downloads per smartphone user (User Acquisition), time spent per smartphone user (engagement), and IAP revenue per unique app-user combination (monetization). Scores are calculated using Z-scores for each metric across the included countries, and rescaled so that scores are between 1 and 5, with a mean of 3. Overall scores are calculated as the weighted average of the three scores (50% monetization, 30% user acquisition, and 20% engagement). Apps classified using Sensor Tower's taxonomy as of January 5, 2025.

Health & Fitness App Market Scores

Scores Between 1-5 Based on Relative Health & Fitness App Performance in Each Market

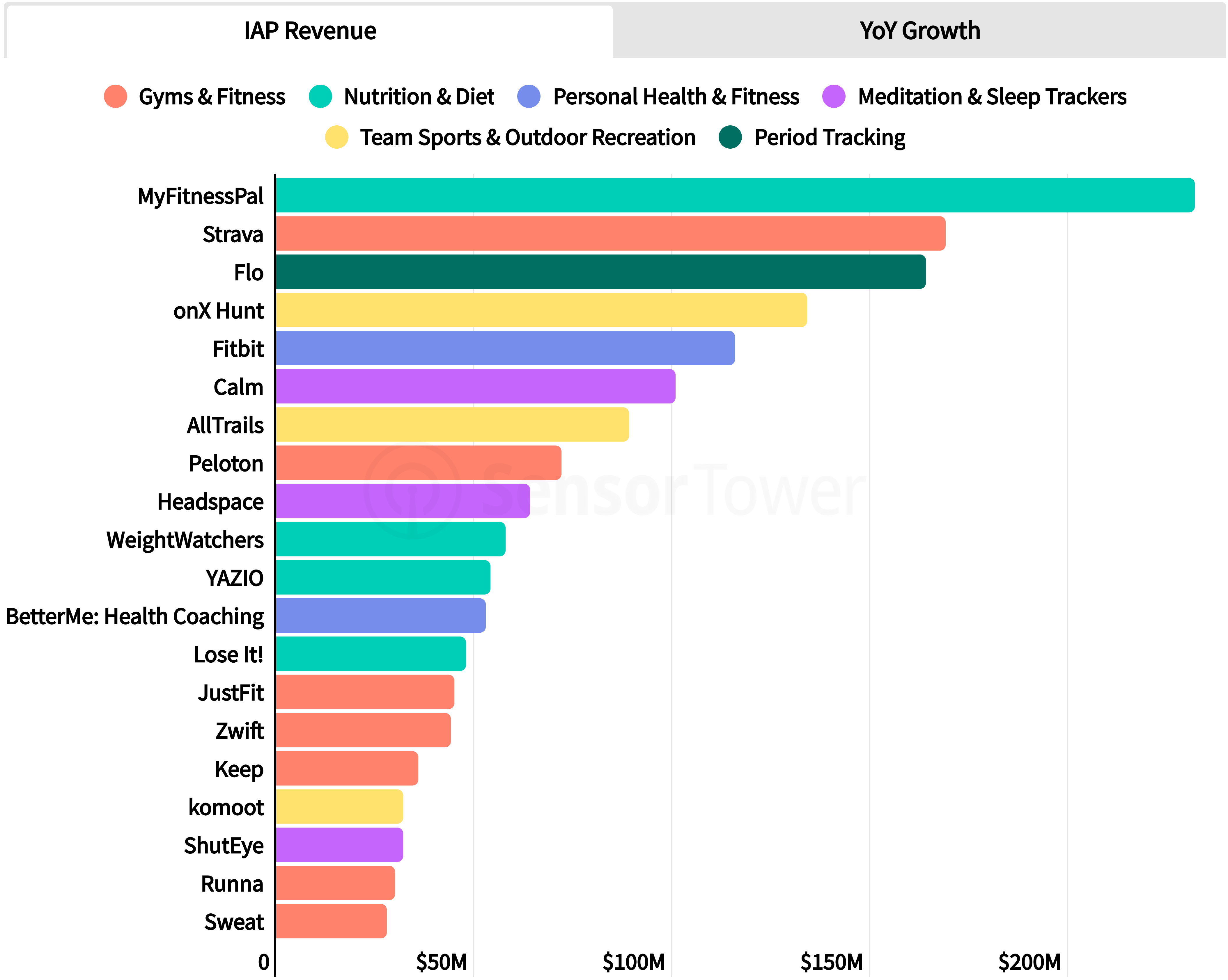


Outdoor Fitness Apps Saw Strong Growth in 2024

Looking at the top Health & Fitness apps by IAP revenue reveals strong monetization potential across subgenres. Six different subgenres were represented among the top 20 apps. Gyms & Fitness led the way with seven of the top 20 apps, followed by Nutrition & Diet with four apps.

The fastest growing apps by IAP revenue point to shifting consumer preferences to get back outside following the surge in demand for at-home workouts during the pandemic. Many of the top Health & Fitness apps by YoY revenue growth are for outdoor exercise and sports, including Strava, onX Hunt, Runna, and AllTrails.

Top Health & Fitness Apps by IAP Revenue
Worldwide in 2024



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

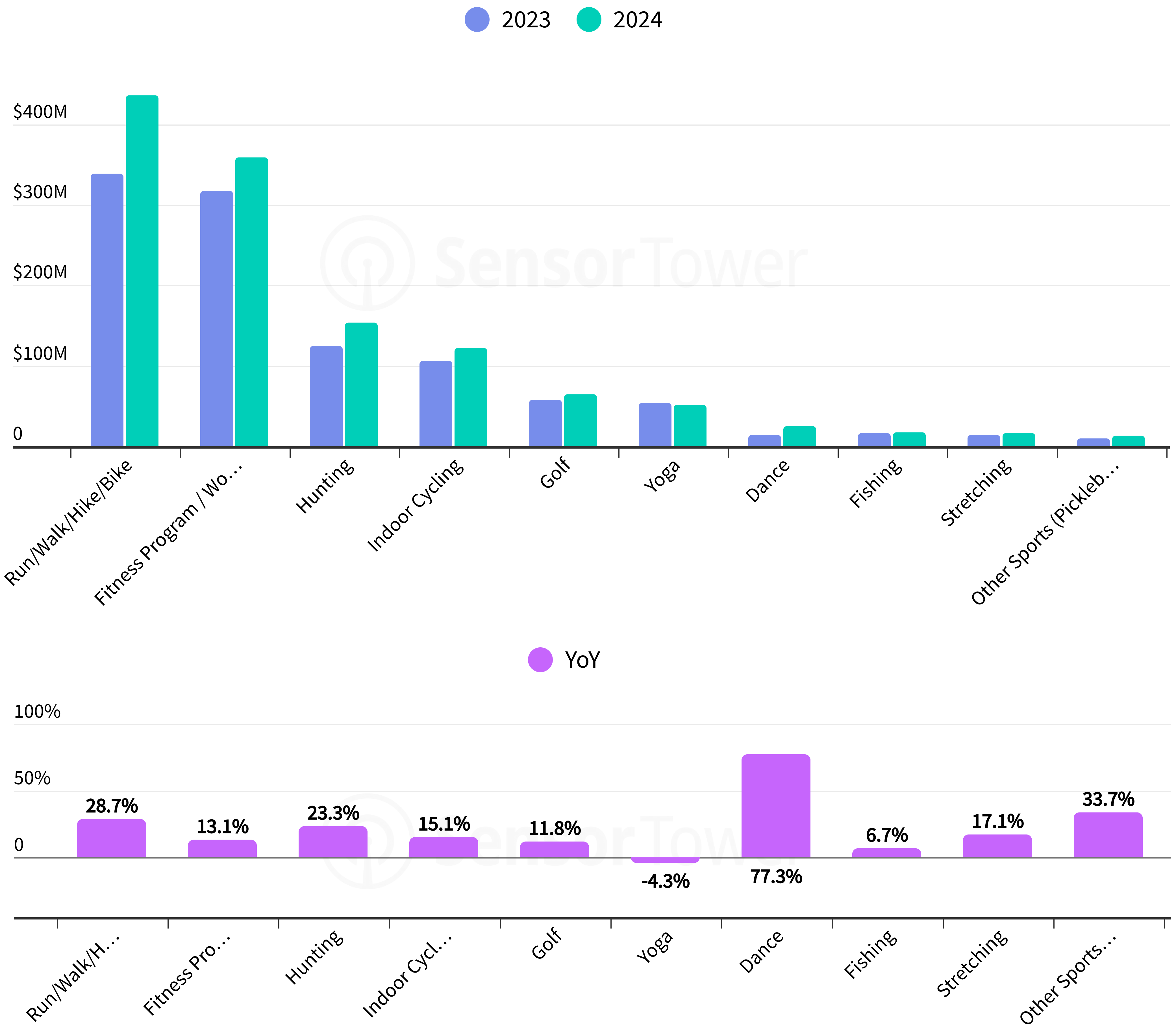
Keep it Moving: Apps for Outdoor Exercise Like Running and Walking Hit New Highs

While most fitness and sports subgenres achieved at least double-digit revenue growth in 2024, several subgenres had a particularly strong year. Apps for running, walking, hiking, and/or biking achieved nearly 30% YoY growth as consumers looked to explore the outdoors, outpacing Fitness Program and Indoor Cycling revenue growth. This also aligns with some signs of digital fatigue seen in several markets like the US.

Several niche sports apps are emerging as well, though revenue is still relatively quite low for these subgenres. Dance app revenue climbed 77% YoY, and some apps for racket sports like tennis and pickleball also emerged.

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

Year-over-Year IAP Revenue Growth for Top Fitness and Sports Subgenres



Health & Fitness

Competition Heating Up for Fitness Rewards Apps

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

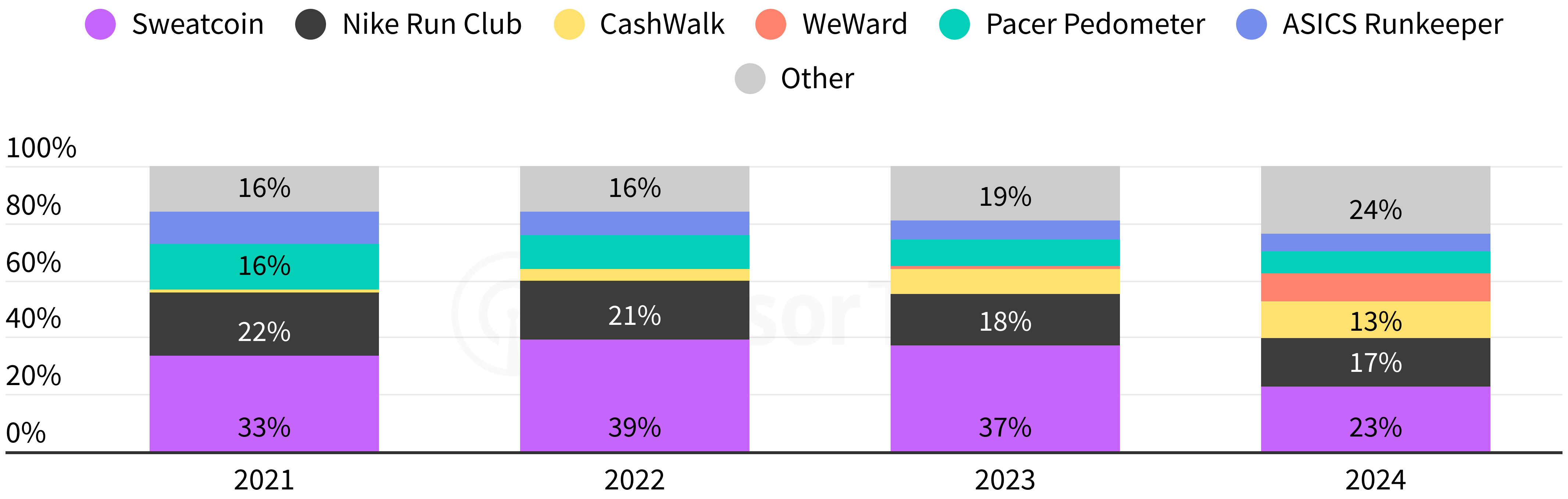
Sweatcoin continued to lead the market, holding nearly a quarter of the MAU market share among leading fitness tracking apps. Meanwhile, new entrants in the US such as CashWalk and WeWard are rapidly acquiring new users, with their MAUs increasing by 42% and an astounding 609% YoY in 2024, respectively.

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

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

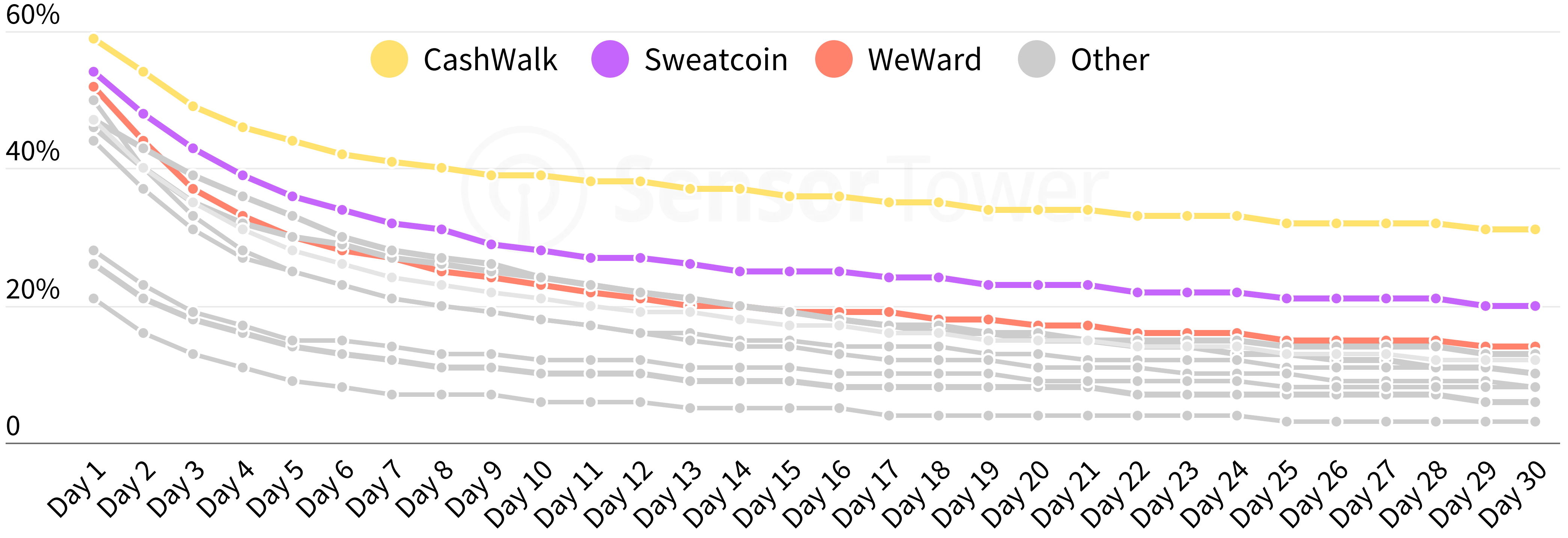
Source: Sensor Tower
Note: iOS and Android combined. MAU market share is calculated at the app/user level (double-counts users who use multiple Walk & Run Tracking apps).. Retention is Android only.

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



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

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



Social Running is on the Rise

Between 2019 and 2021, interest in running terms like "running", "running group", and "strava" were relatively stable. Interest in racing-related terms like "5k" and "marathon" were lower as most in-person races were cancelled due to the COVID-19 pandemic.

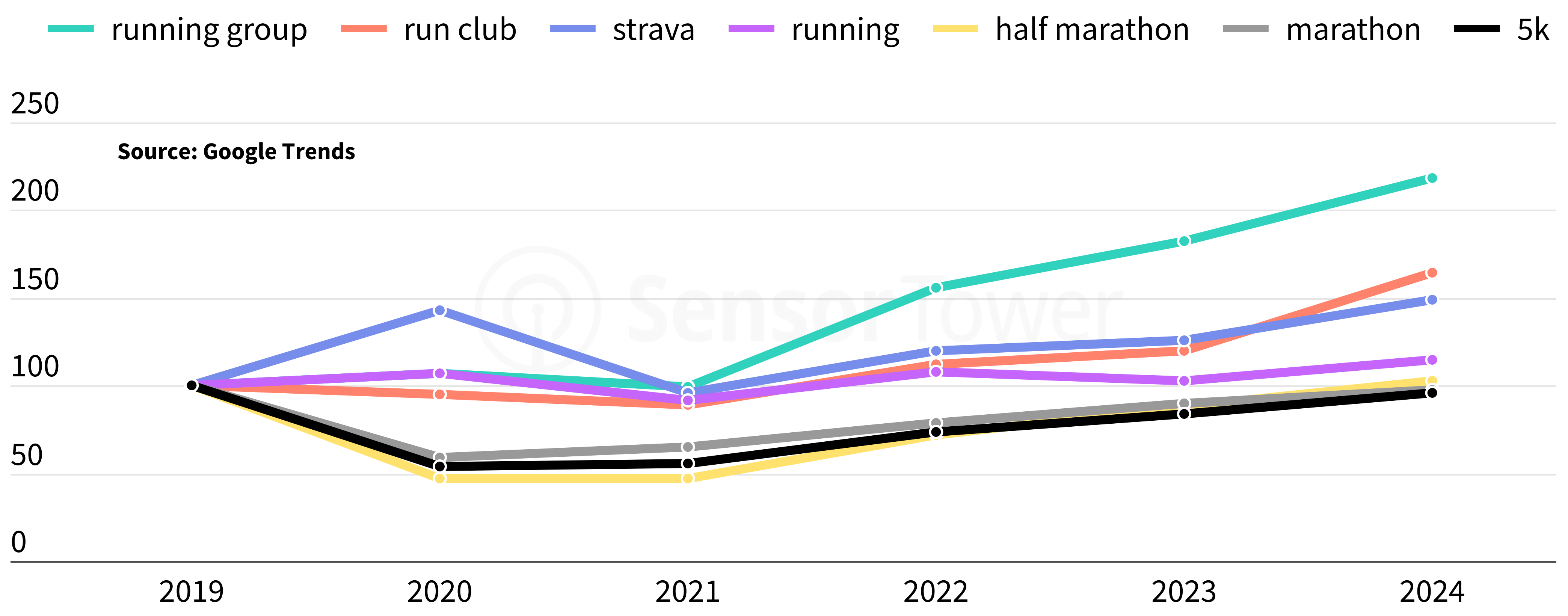
More recent years reveal a surge in demand for social running. Google search interest for "running group" more than doubled between 2019 and 2024, and "run club" outpaced interest in "running". Strava, the leading social platform for runners, also benefited.

From 2022 through 2024, interest in racing came roaring back, with "half marathon" searches leading the way with 43% growth. Despite this, search volume is right around where it was before the pandemic, suggesting that demand for social running is exceeding that for racing even with in-person racing options back to normal.

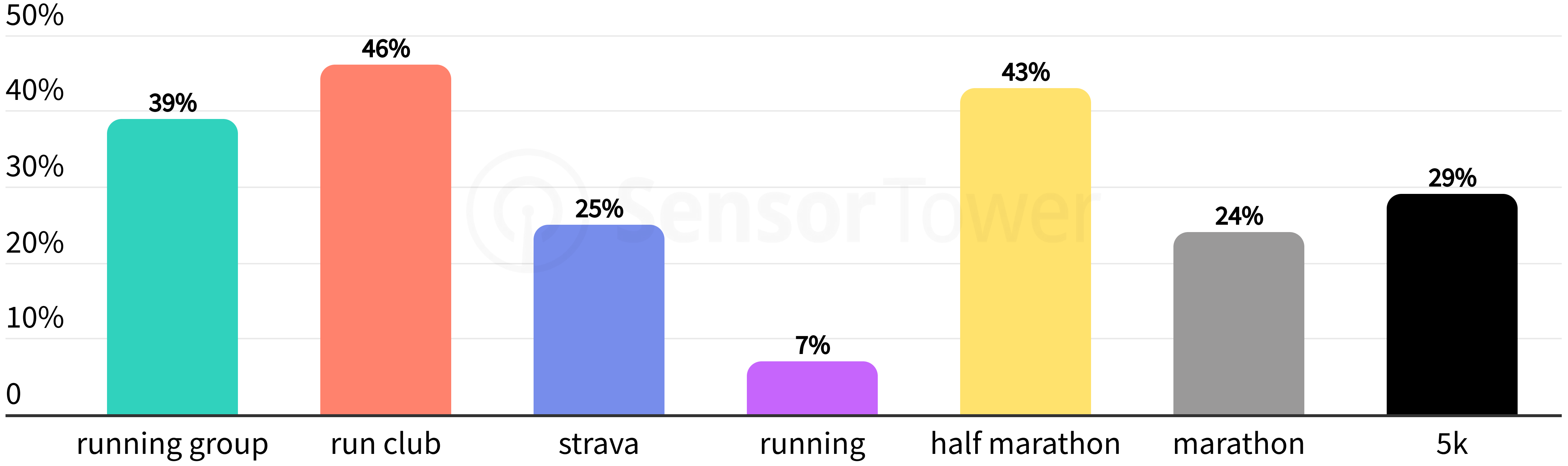
Source: Google Trends
Note: Growth based on yearly average of monthly "interest over time" scores from Google.

Web Search Trends for Running-Related Terms in the United States

Growth for Each Term Relative to Its Popularity in 2019



Growth in Web Search Term Popularity Between 2022 and 2024



Health & Fitness

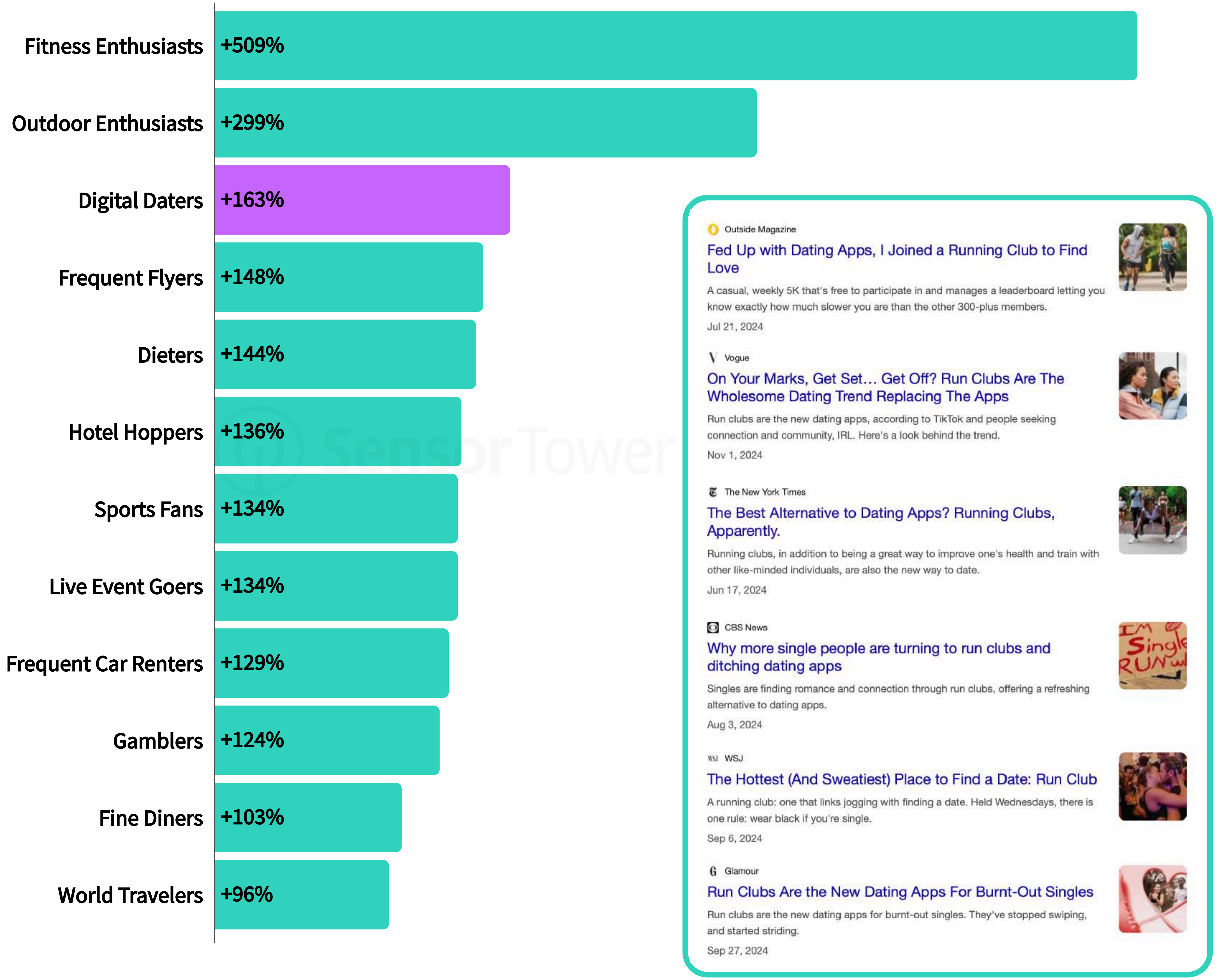
Are Run Clubs a Dating App Substitute?

US consumers are showing signs of shifting preferences back towards in-person socialization. Time spent on social media apps, video streaming, and dating declined in the US for the first time ever in 2024 (though time spent for each genre high). As a result, apps that help consumers to connect with their communities in-person in addition to in the app tended to outperform the market.

One big example of this trend in the US was the rise of running clubs as an alternative to dating apps. Strava was in a prime position to benefit from this shift as it's audience has a very high overlap with the "digital daters" persona (people who use dating apps).

Top Audience Personas for Users of Strava

Audience vs. General Population, Likelihood to Fall Into This Persona (% Difference)



Outside Magazine
Fed Up with Dating Apps, I Joined a Running Club to Find Love
A casual, weekly 5K that's free to participate in and manages a leaderboard letting you know exactly how much slower you are than the other 300-plus members.
Jul 21, 2024

Vogue
On Your Marks, Get Set… Get Off? Run Clubs Are The Wholesome Dating Trend Replacing The Apps
Run clubs are the new dating apps, according to TikTok and people seeking connection and community, IRL. Here's a look behind the trend.
Nov 1, 2024

The New York Times
The Best Alternative to Dating Apps? Running Clubs, Apparently.
Running clubs, in addition to being a great way to improve one's health and train with other like-minded individuals, are also the new way to date.
Jun 17, 2024

CBS News
Why more single people are turning to run clubs and ditching dating apps
Singles are finding romance and connection through run clubs, offering a refreshing alternative to dating apps.
Aug 3, 2024

WSJ
The Hottest (And Sweatiest) Place to Find a Date: Run Club
A running club: one that links jogging with finding a date. Held Wednesdays, there is one rule: wear black if you're single.
Sep 6, 2024

Glamour
Run Clubs Are the New Dating Apps For Burnt-Out Singles
Run clubs are the new dating apps for burnt-out singles. They've stopped swiping, and started striding.
Sep 27, 2024

Source: Sensor Tower
Note: Among Android users in the United States in Q4 2024.

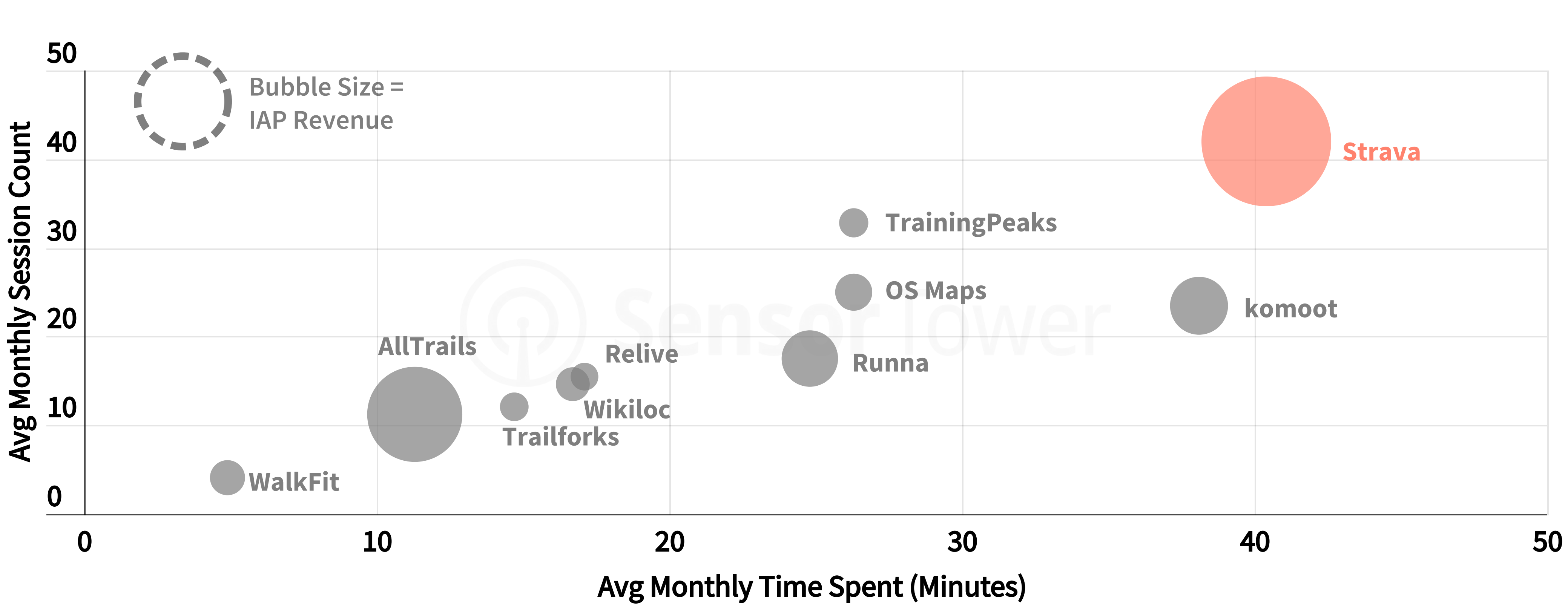
Health & Fitness

Strava's Social Features Helped it Capitalize on Running Groups' Popularity

Social running is on the rise — and Strava's emphasis on building a community in the running space helped it capitalize on this shift. Web search trends reveal that interest in searches like "running club" and "run group" have soared well above their pre-pandemic levels, while searches like "running", "half marathon", and "5k" are around where they were back in 2019.

Strava's community-promoting features like its social feed, clubs, in-app events, and its latest addition — chat — help runners continue to connect with their friends even after the run is over, and even plan their next meetup. This helped make Strava the market leader for engagement, with users spending an average of 40 minutes per month in the app.

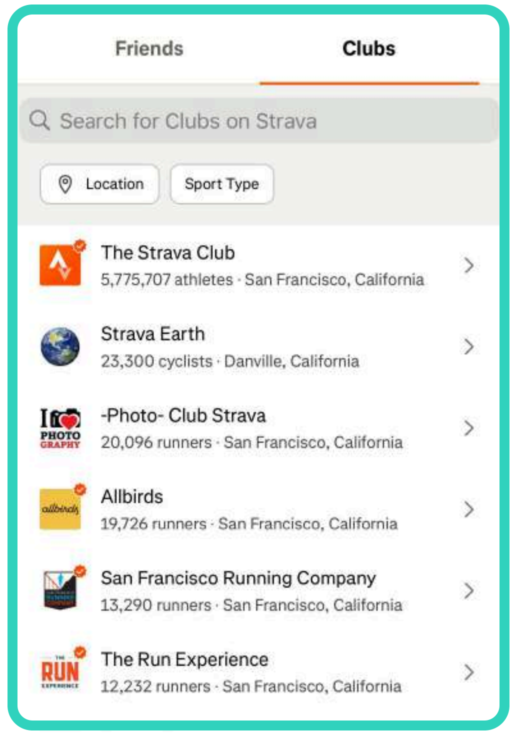
Monthly Engagement for Top Running & Walking Apps in 2024



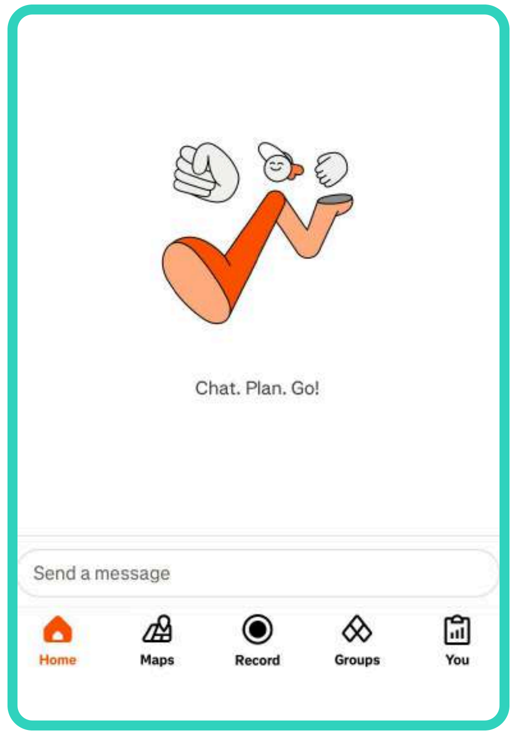
Example Strava Features

Social Feed

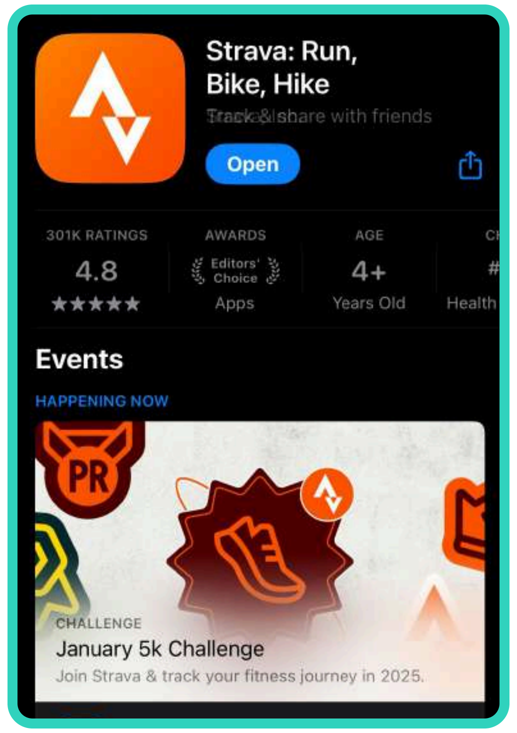
Clubs



New Chat Feature



In-App Events



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

Health & Fitness

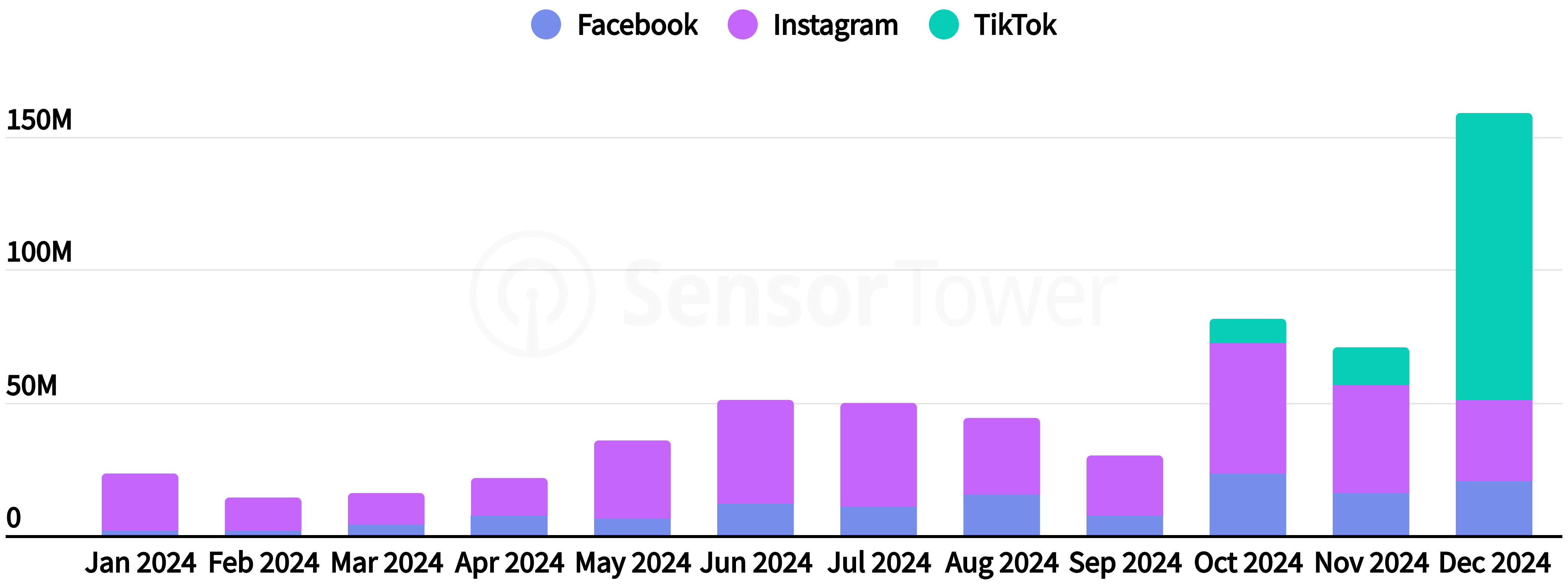
Strava Began Advertising on TikTok to Capture a Social Running Audience

Strava's advertising demonstrates how the company began promoting community. For example, Strava began advertising on TikTok in late 2024 ahead of peak demand at the start of the new year to capture a young, social running audience. Ad creatives promoted how users "have my run crew in app and in real life".

Strava's other ad campaigns also emphasized finding a community, including a campaign for cyclists on Instagram.

Source: Pathmatics by Sensor Towe

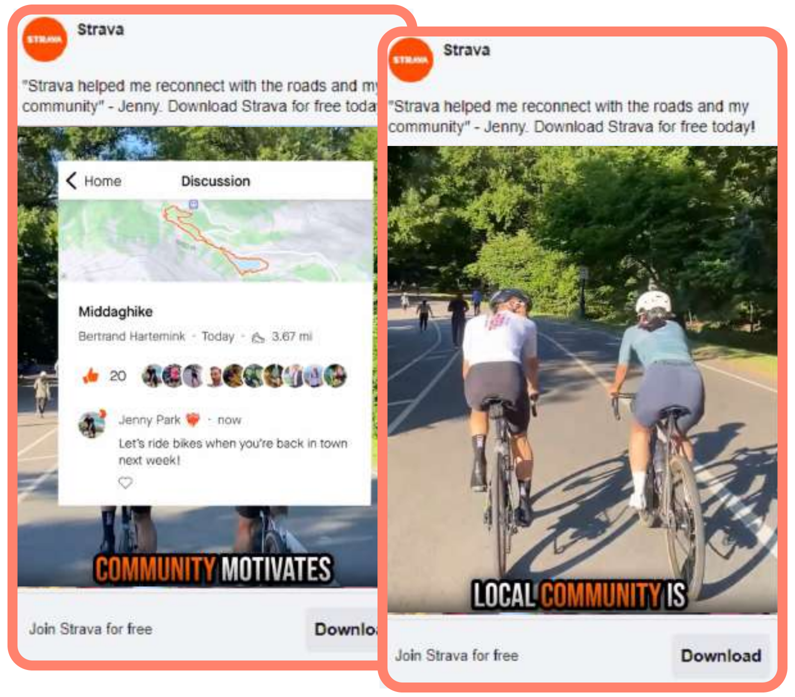
Monthly US Ad Impressions for Strava



Example Strava Ad Creatives

TikTok Video Post
(October 5 - November 27, 2024)

Instagram / Facebook Video Post
(August 21, 2024 - January 9, 2025)



Health & Fitness

Dating Apps Take Notice: Tinder Teamed Up with Runna for London Events

There was another signal that dating apps are feeling the heat in 2024. In the UK, Tinder partnered with Runna for a series of SoleMates Run Club events during the summer. Tinder's UK user base has a strong overlap with popular outdoor exercise and fitness tracker apps like Strava, Garmin Connect, Fitbit, and AllTrails. Meanwhile, the partnership helped give more exposure to Runna, which Tinder users were 1.65x more likely to use than the general population by Q4 2024.

Source: Sensor Tower
Note: Among Android users in the United Kingdom

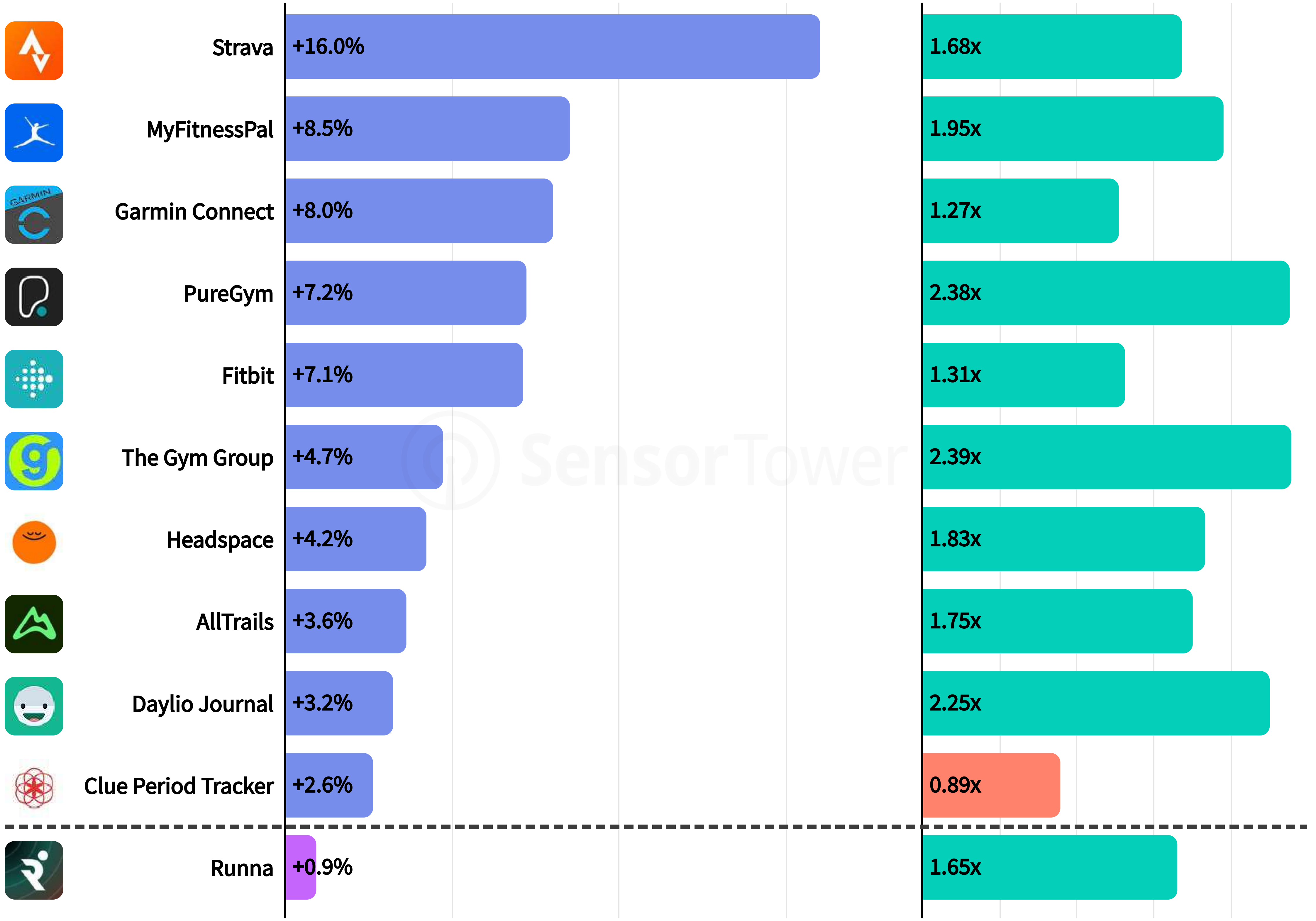
Health & Fitness Apps that Tinder Apps Users are More Likely to Use

United Kingdom in Q4 2024

Share of Tinder Users Using Apps

Likelihood of Use vs. General Population

>1x Means Tinder Users are More Likely to Use the App Than the General Population



Health & Fitness

Runna Finds its Niche with Dedicated Runners

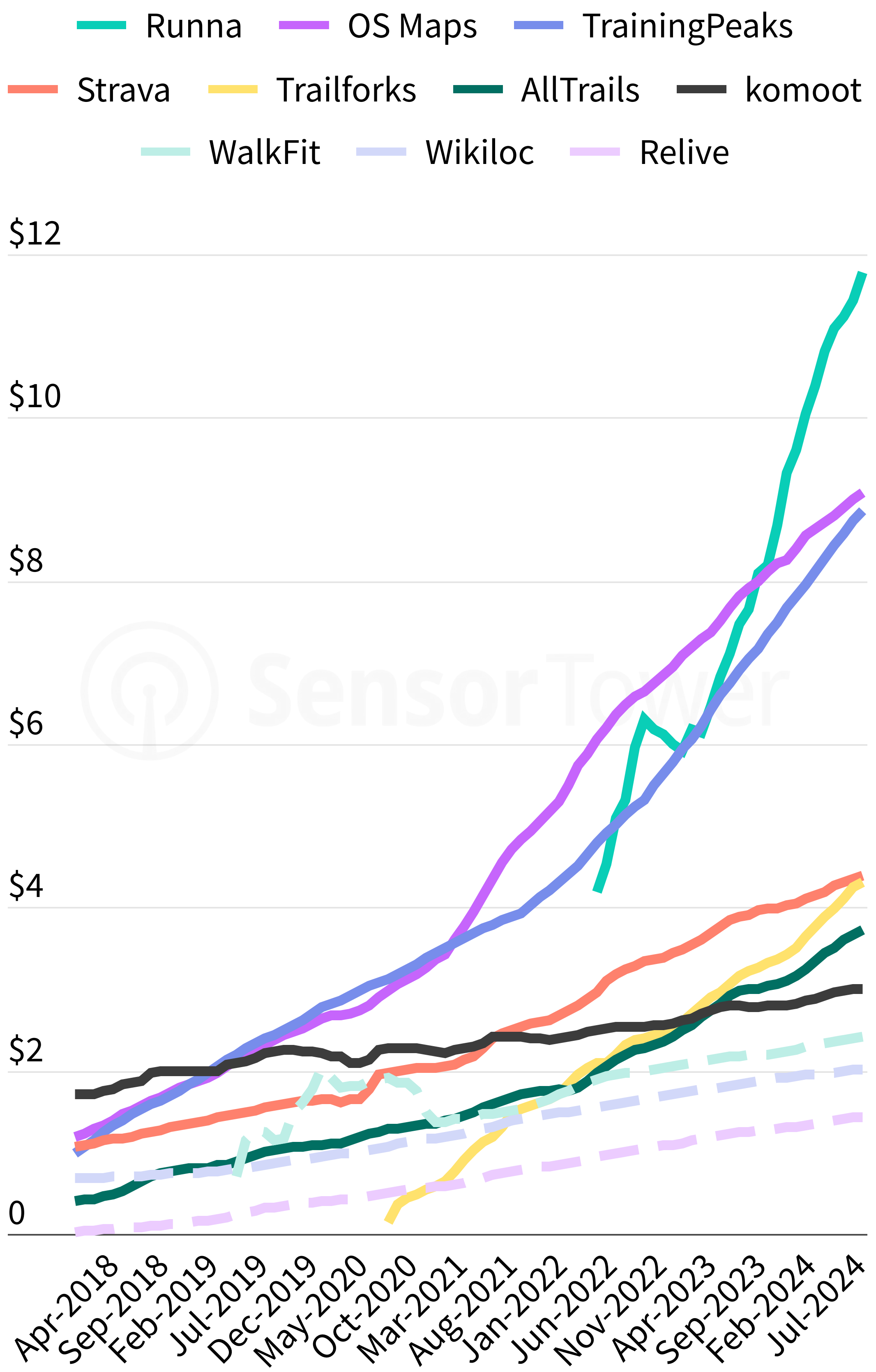
Another theme for mobile users in 2024 is that they are willing to spend money on the right app, even as they are spending less time on their phones. Users are more discerning with their time and are emphasizing quality over quantity.

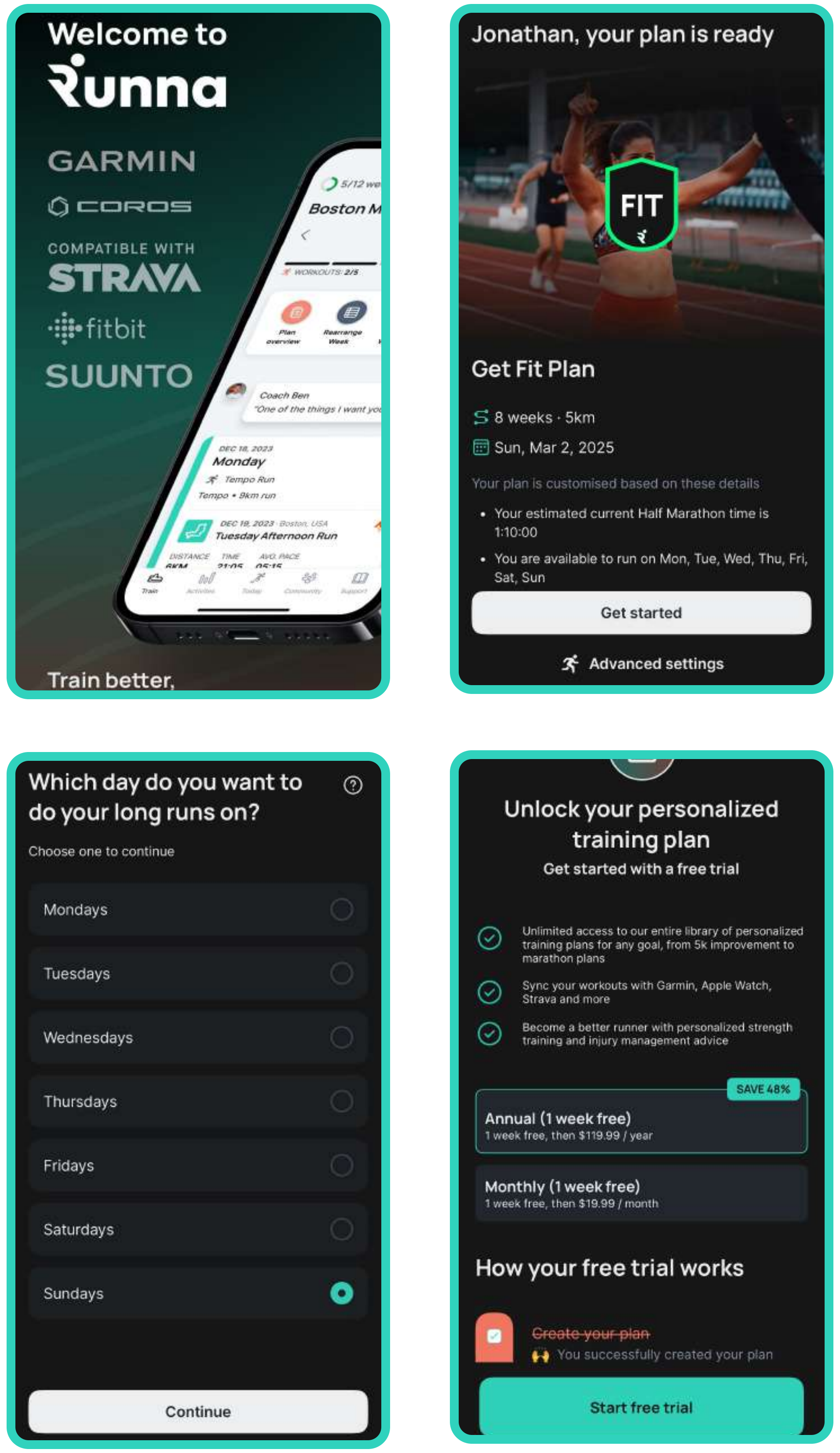
Runna's rising popularity exemplifies this trend. Unlike Strava, which is free to use and monetizes through a subscription that unlocks premium features, Runna offers highly personalized training plans that require a subscription after a free trial period. As a result, Runna has a very high revenue per download since the vast majority of its users are paid subscribers, through its user base will remain relatively small given that it's focused on dedicated runners looking for a custom training plan.

Runna's rapid rise certainly caught the attention of Strava. Strava announced that it would be acquiring Runna in April 2025.

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

All-Time Revenue per Downloads (RPD) for Top Running & Walking Apps





Health & Fitness Apps Take a Cautious Approach with AI

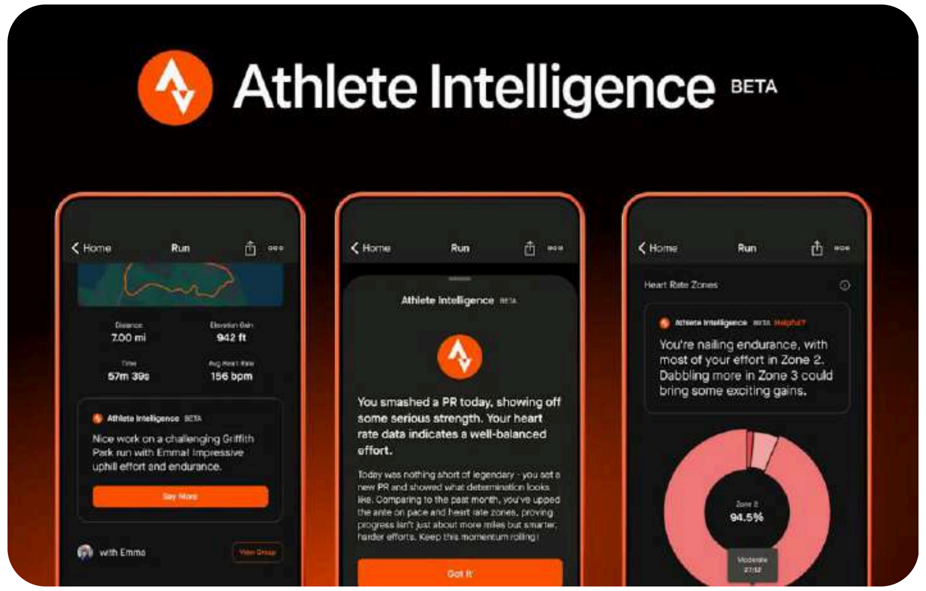
Consumers approach their physical and mental health very seriously, and Health & Fitness apps have taken a conservative approach to implementing AI so far. For apps providing workout plans or mental health services, offering good advice can help avoid injuries or other negative outcomes for customers. This means that AI provides huge potential — but risks of errors support a cautious approach. Most apps gradually have rolled out their AI offerings in "beta" or to select markets and languages, allowing them to carefully study the results and limit risks.

Explore some of the example AI features included in top Health & Fitness apps like Strava, Headspace, and AllTrails below.

Source: Sensor Tower

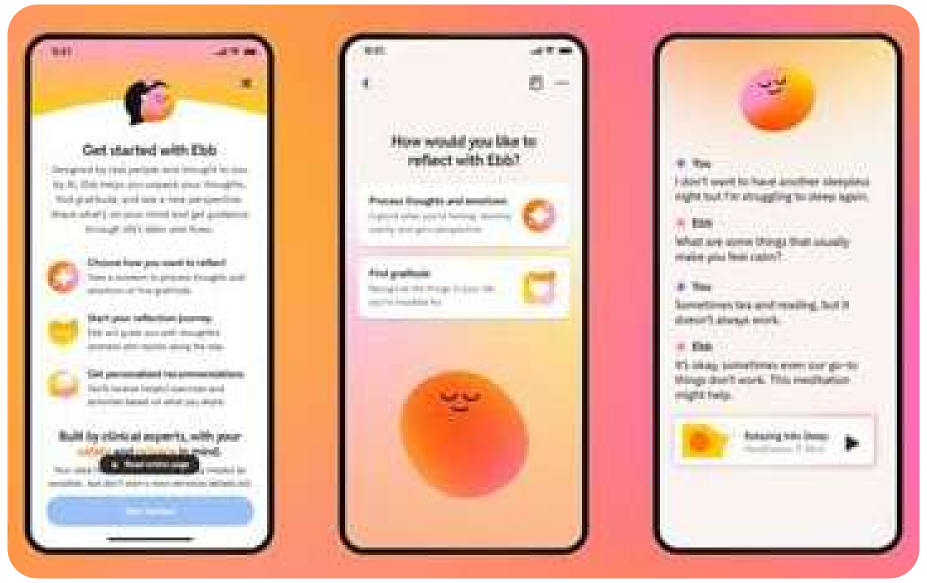
Strava

In October 2024, Strava unveiled Athlete Intelligence in public beta available in 14 languages (available to subscribers only). This feature analyzes activity data to provide insights and guidance. With this release, Strava can get feedback based on the results and improve the feature over time.



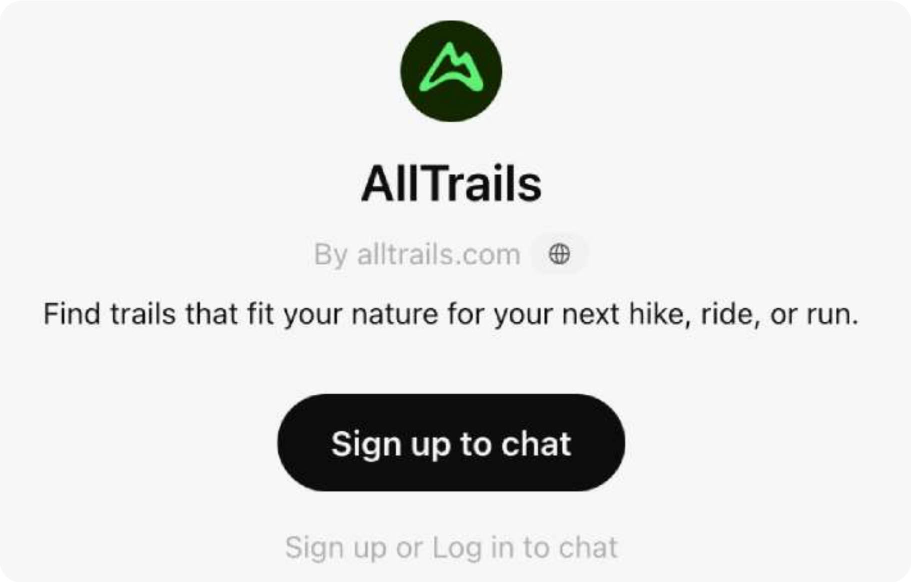
Headspace

Also in October 2024, Headspace released Ebb, an AI mental health companion. esigned with the help of clinical psychologists, Ebb is currently available only to subscribers, and is available in the US, Australia, and Canada. Headspace notes that "Ebb is not a substitute for medical or mental health treatment", but can be a helpful tool in your mental health toolkit.



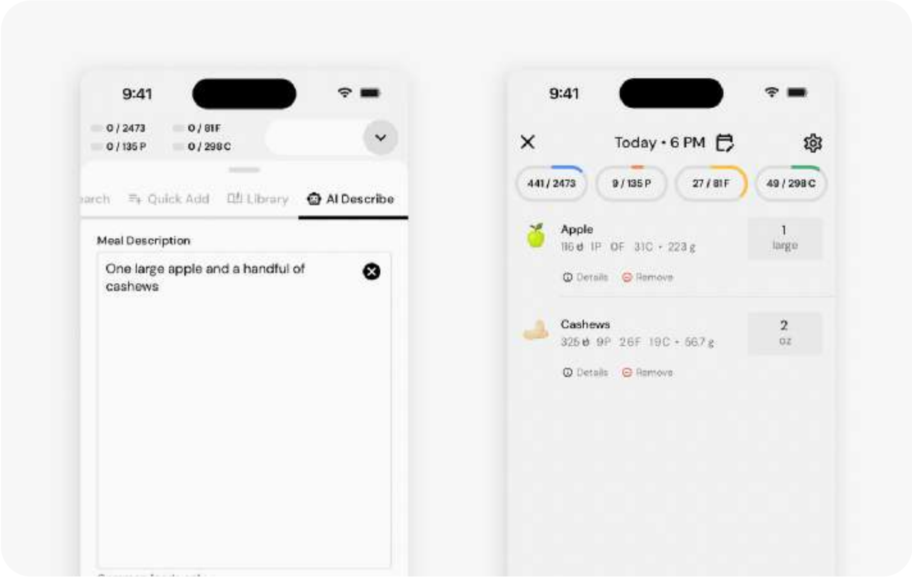
AllTrails

AllTrails took a quicker (and simpler) approach to AI, releasing TrailGPT, an AI chatbot available on the GPT store. AllTrails used OpenAI's model to help people find the right trail for a hike, ride, or run. AllTrails doesn't charge directly for this feature in the app — rather it hopes to direct ChatGPT Plus users to its service and then sell its other helpful features like Live Share, part of an AllTrails+ membership.



MacroFactor

MacroFactor's AI Describe feature lets users simply dictate what they ate, and converts the description into a list of food for their food log. This tool can help users more quickly log meals that would otherwise be difficult of time consuming to log.



2024 Rankings by Market | Health & Fitness

AMER - Downloads

	Worldwide	United States	Canada	Mexico	Brazil	Argentina
1	Flo by Flo Health (Period Tracking)	Planet Fitness Workouts (Gyms & Fitness)	Yuka (Nutrition & Diet)	Imss Digital (National Medical Service)	Conecte SUS (National Medical Service)	Sweatcoin (Gyms & Fitness)
2	Health Tracker: BP Hub (Medical Tracking Apps)	Yuka (Nutrition & Diet)	AllTrails (Team Sports & Outdoor Recreation)	Flo by Flo Health (Period Tracking)	Flo by Flo Health (Period Tracking)	FitPro (Gyms & Fitness)
3	FitPro (Gyms & Fitness)	MyChart (Telehealth)	Flo by Flo Health (Period Tracking)	FitPro (Gyms & Fitness)	Health Tracker: BP Hub (Medical Tracking Apps)	BetterMe: Workouts (Other Personal Health & Fitness)
4	Sweatcoin (Gyms & Fitness)	CVS Pharmacy (Pharmacies)	Sleep Sounds Tracker: ShutEye (Meditation & Sleep Trackers)	Health Tracker: BP Hub (Medical Tracking Apps)	Drogasil (Pharmacies)	Prestadores PAMI (National Medical Service)
5	Home Workout - No Equipments (Gyms & Fitness)	Flo by Flo Health (Period Tracking)	Strava Running and Cycling (Gyms & Fitness)	Farmacias Del Ahorro (Pharmacies)	Cartão De Todos (Telehealth)	Flo by Flo Health (Period Tracking)

Download data

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

06 Dating

Dating patterns returned to normal, with the fastest revenue gaining apps focusing on dating rather than friend finding and social discovery. Time spent in Dating apps has fallen off from its peak following the pandemic, but users reveal that they are still willing to spend to find relationships. As a result, AI features that help users save time and find matches can help dating apps stand out in a competitive field.

Dating

Dating Apps Hold Strong Revenue Growth Despite Declining Time Spent in the US and Europe

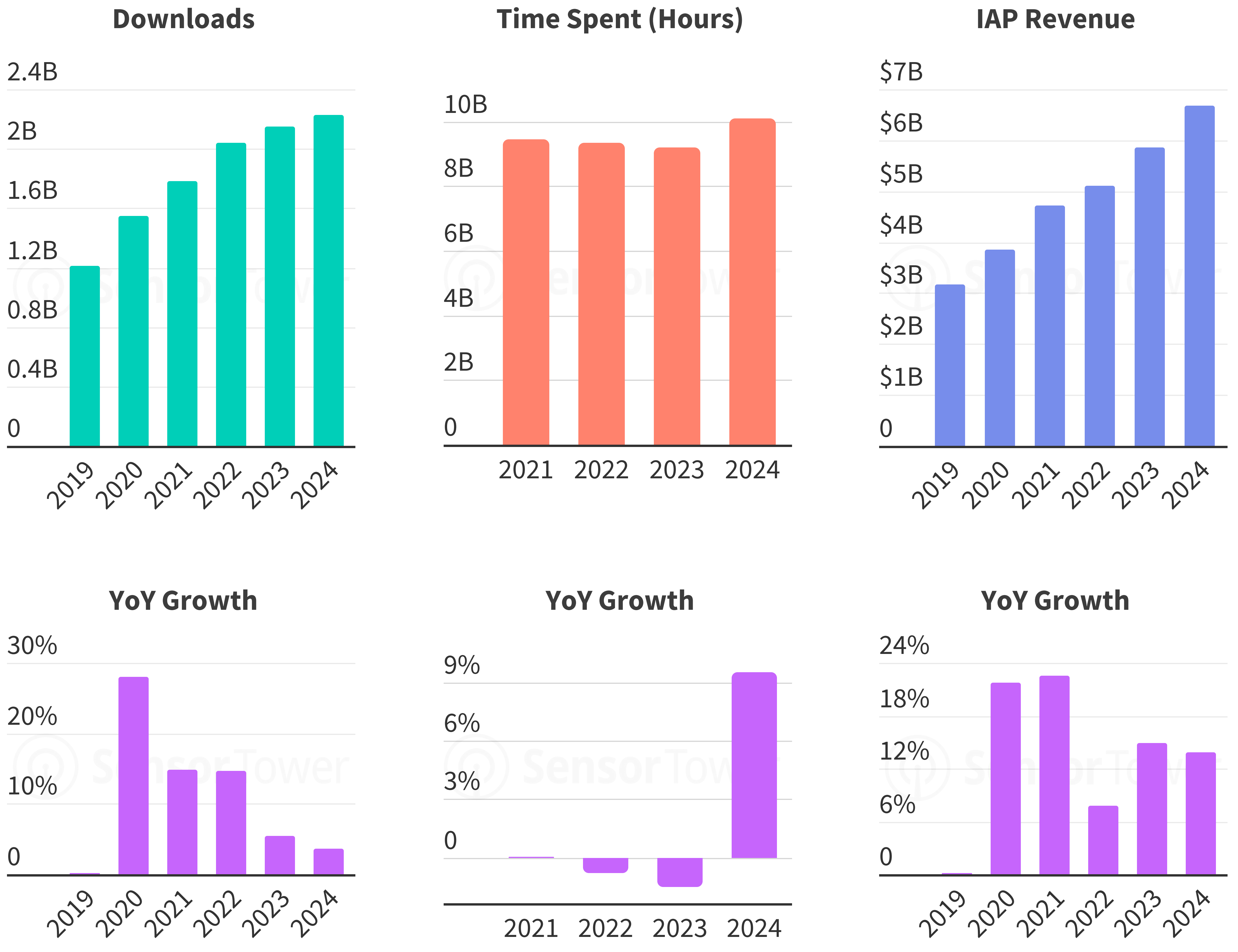
Globally, Dating and Social Discovery app downloads continued to climb in 2024, up 4% YoY. While positive growth is still a good sign for the genre, we've seen growth slow since the spike at the start of the COVID-19 pandemic in 2020.

Time spent spiked in 2024 in several markets including India, Indonesia, Turkey, and Saudi Arabia. Meanwhile, time spent on Dating apps in the US, Japan, and western Europe declined as a sign of digital fatigue in these markets.

Meanwhile, IAP revenue growth for Dating apps remained strong in 2024. Worldwide revenue climbed 14% YoY, and Turkey showed particularly impressive growth as Dating apps begin to break through in the market.

Yearly Trends for Dating & Social Discovery Apps

Worldwide



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

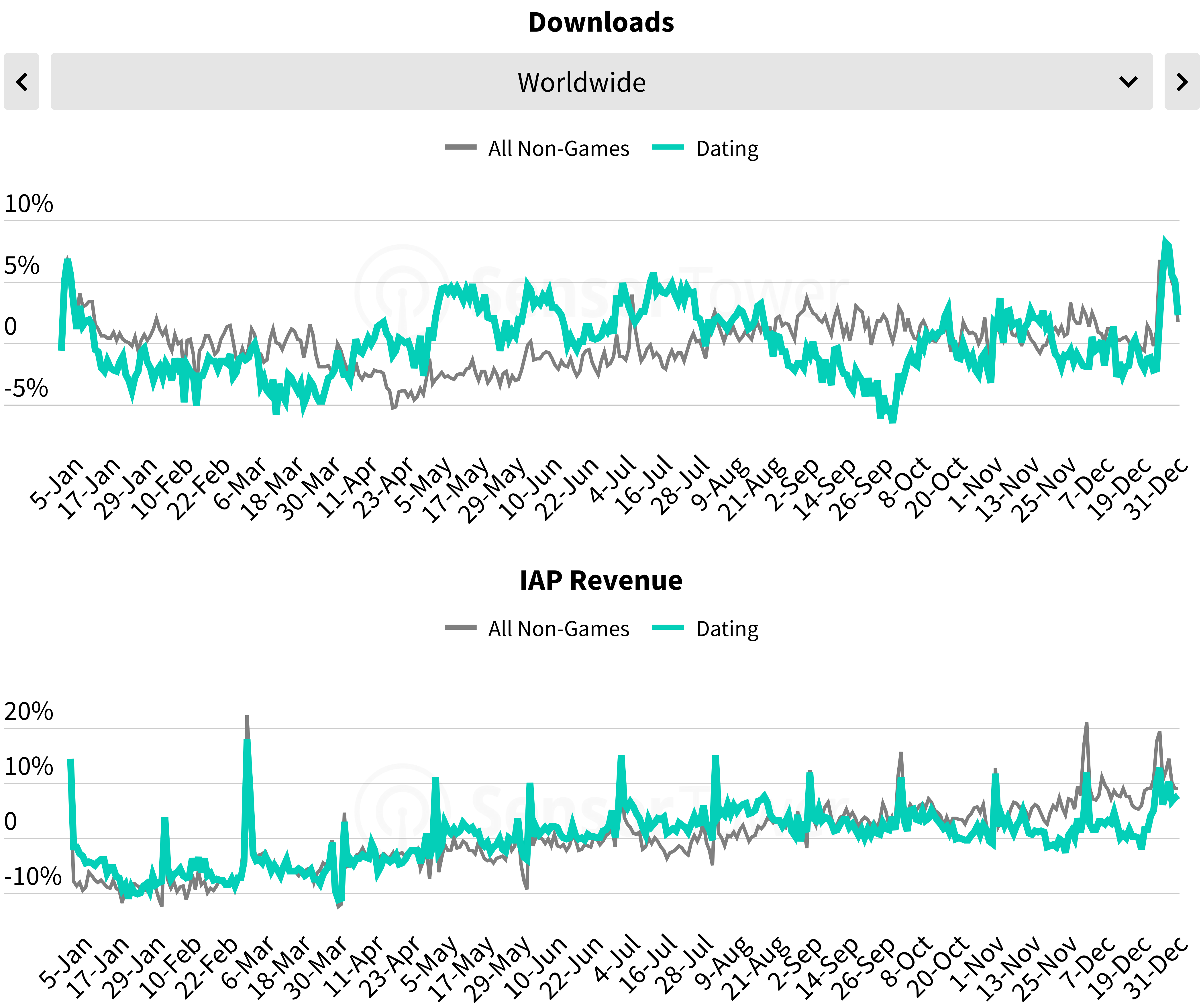
Dating App Demand Peaks in the Summer Months and the New Year

Although Dating sees a boost in the United States around the holiday season and into the new year, it tends to be a little less pronounced compared to the non-game app market generally. Dating apps outperform the non-game market in the summer months when the weather is nicer and the days are longer.

Seasonal patterns are very different depending on the market. Find out when Dating app demand peaks to guide your strategy in individual markets.

Seasonal Trends for Dating & Social Discovery Apps

Change vs. Daily Average for the Past Four Years (2021-2024)



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

Dating and Social Discovery Hold Similar Market Shares — Though Demand Varies by Market

Dating and Social Discovery app downloads were very similar in Q4 2024, though Dating typically has a slightly larger market. These genres tend to have very similar features, with the main distinction being whether they are marketed for dating or finding new friends. Several apps may offer both Dating and Social Discovery options, in which case the app is classified based on which feature is promoted more heavily by the app developer.

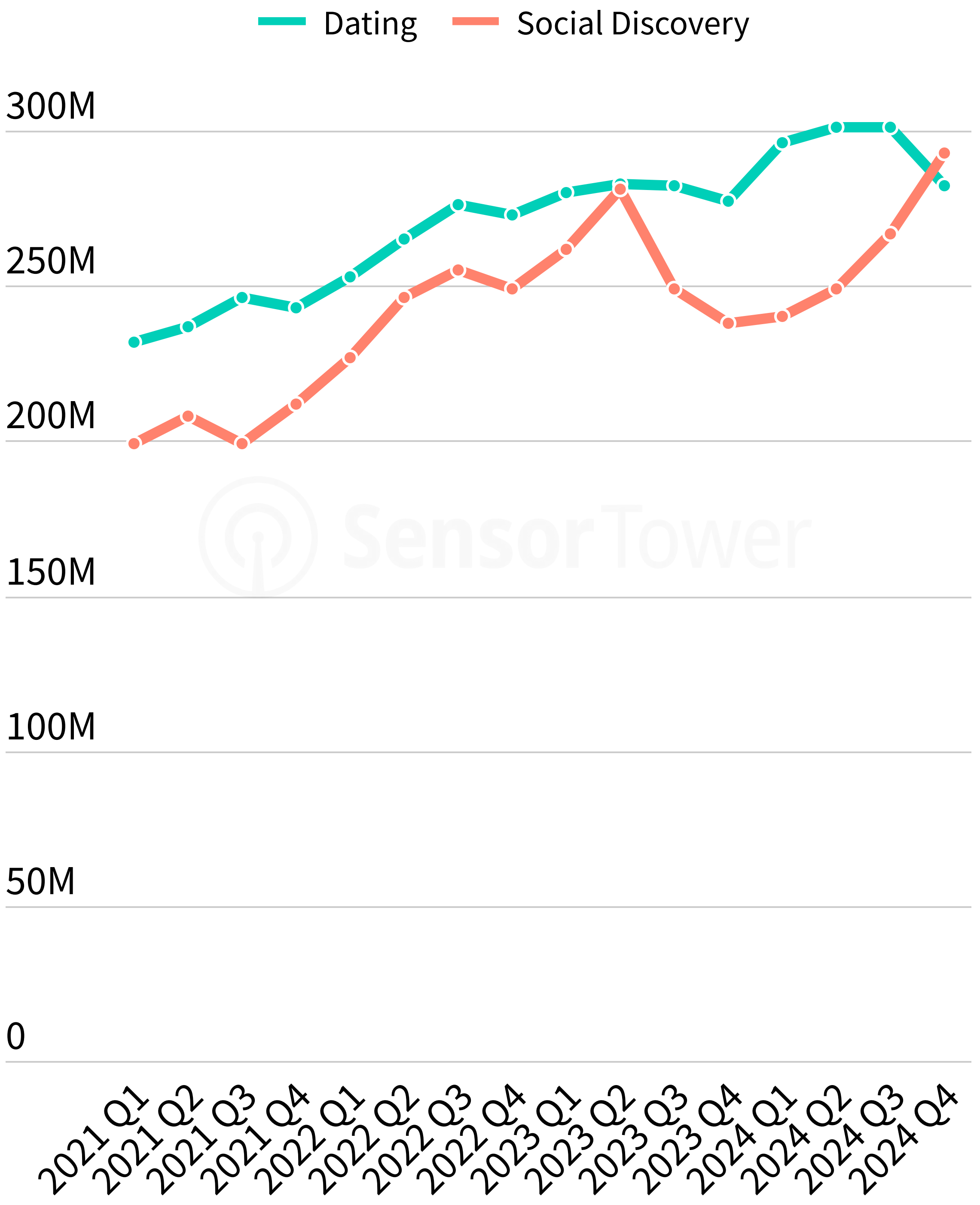
While the global downloads between the genres are similar, popularity varies significantly by market. Dating continued to hold a large edge in markets like the US, the UK, and Japan, while Social Discovery was particularly popular in India and Indonesia.

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

Dating & Social Discovery Download Trends by Subgenre

Worldwide

Quarterly Downloads by Subgenre



Top Apps by Downloads in 2024

	App	Subgenre
1	OmeTV	Dating
2	Tinder Dating App	Dating
3	Bumble Dating App	Dating
4	Litmatch	Social Discovery
5	Badoo	Dating
6	Azar	Social Discovery
7	SUGO	Social Discovery
8	Timo Club	Social Discovery
9	iHappy	Dating
10	Hinge	Dating

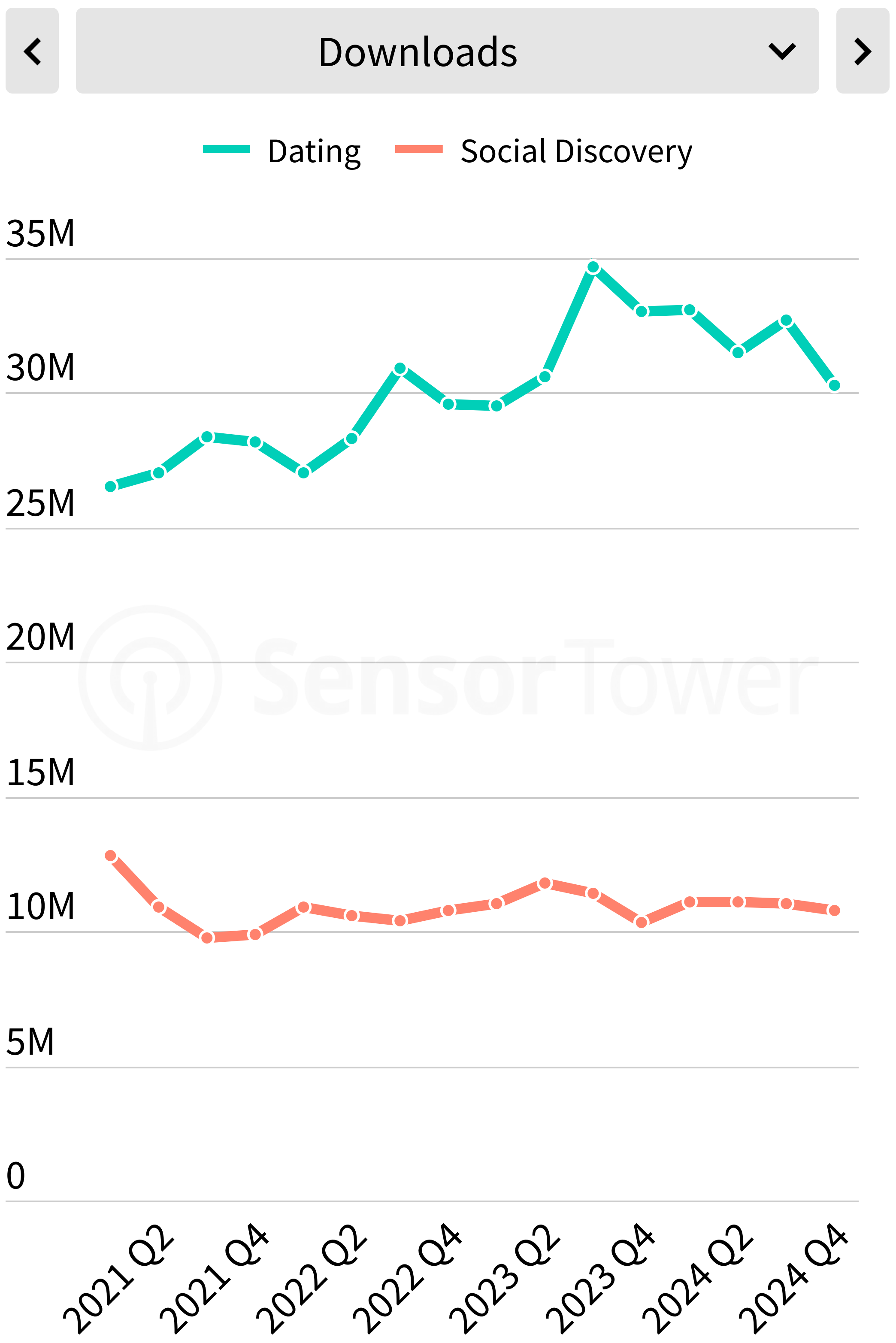
Dating

Social Discovery Held User Attention in the US Yet Struggled to Monetize It

Dating apps still hold a large advantage over Social Discovery in terms of monetizing with in-app purchases, which helps explain why Dating tends to control higher market share in countries with better monetization opportunities. While Social Discovery accounted for around 25% of downloads in the US (and a similar share of time spent), these apps only took around 12% of the revenue. By Q4 2024, Dating app revenue per download approached $20 compared to around $8 for Social Discovery.

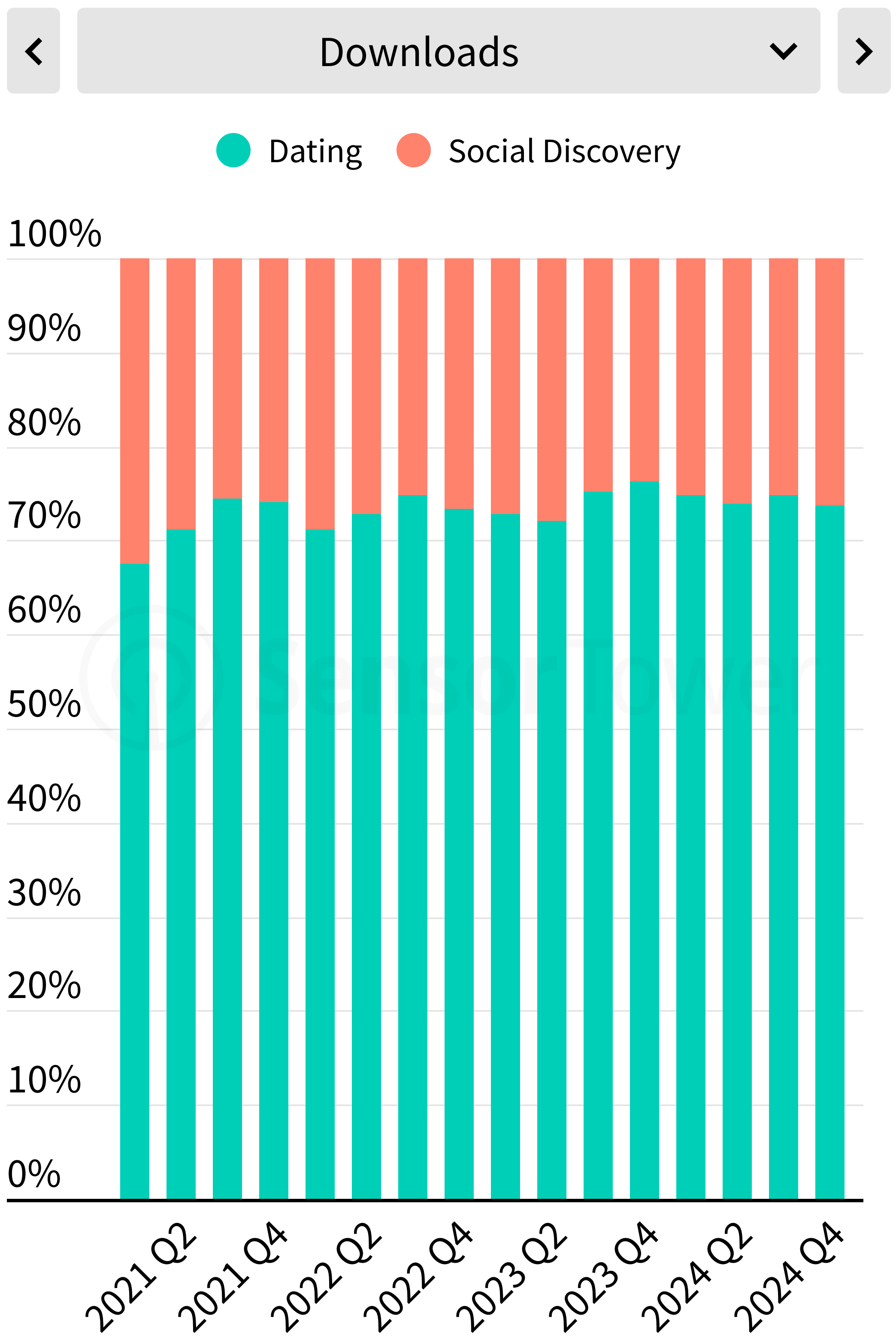
Dating & Social Discovery Trends in the United States

Quarterly Totals by Subgenre



Quarterly Market Share

Note: Market share not calculated for revenue per download



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

Dating

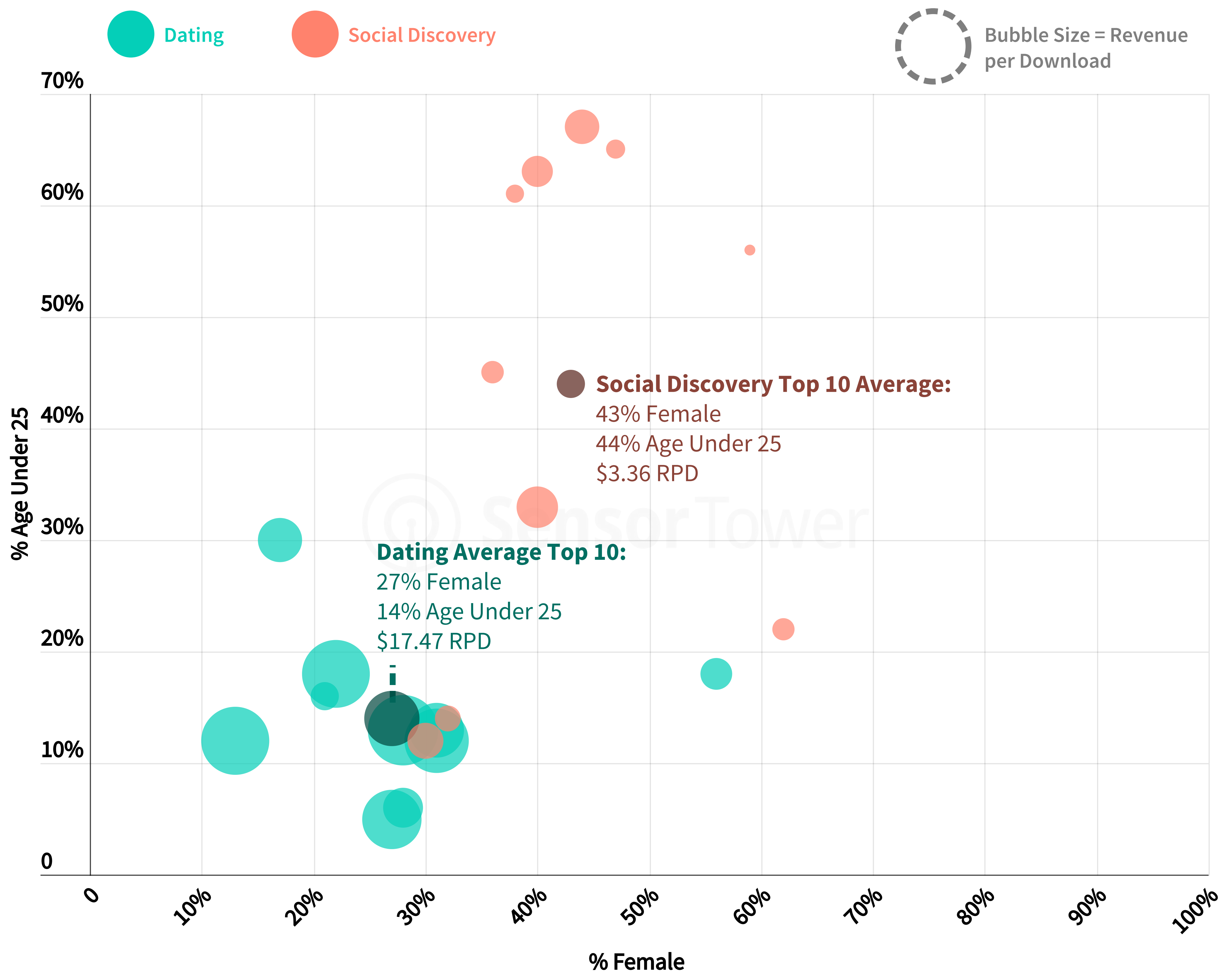
Dating Apps Appeal to an Audience that is More Likely to Spend

Dating apps higher monetization potential is largely explained by their user demographics. Dating app users tend to be older than Social Discovery users and thus are more likely to have more disposable income. 86% of Dating app users are over the age of 25, while only 56% of Social Discovery app users are over 25 years old. This will continue to be a challenge for Social Discovery apps if they continue to be more popular with a younger audience that is less willing to spend on IAPs.

Interestingly, Dating apps also skew much more heavily to a male demographic than Social Discovery apps on average.

Age vs. Gender Breakdown for Top Dating & Social Discovery Apps

United States on iOS



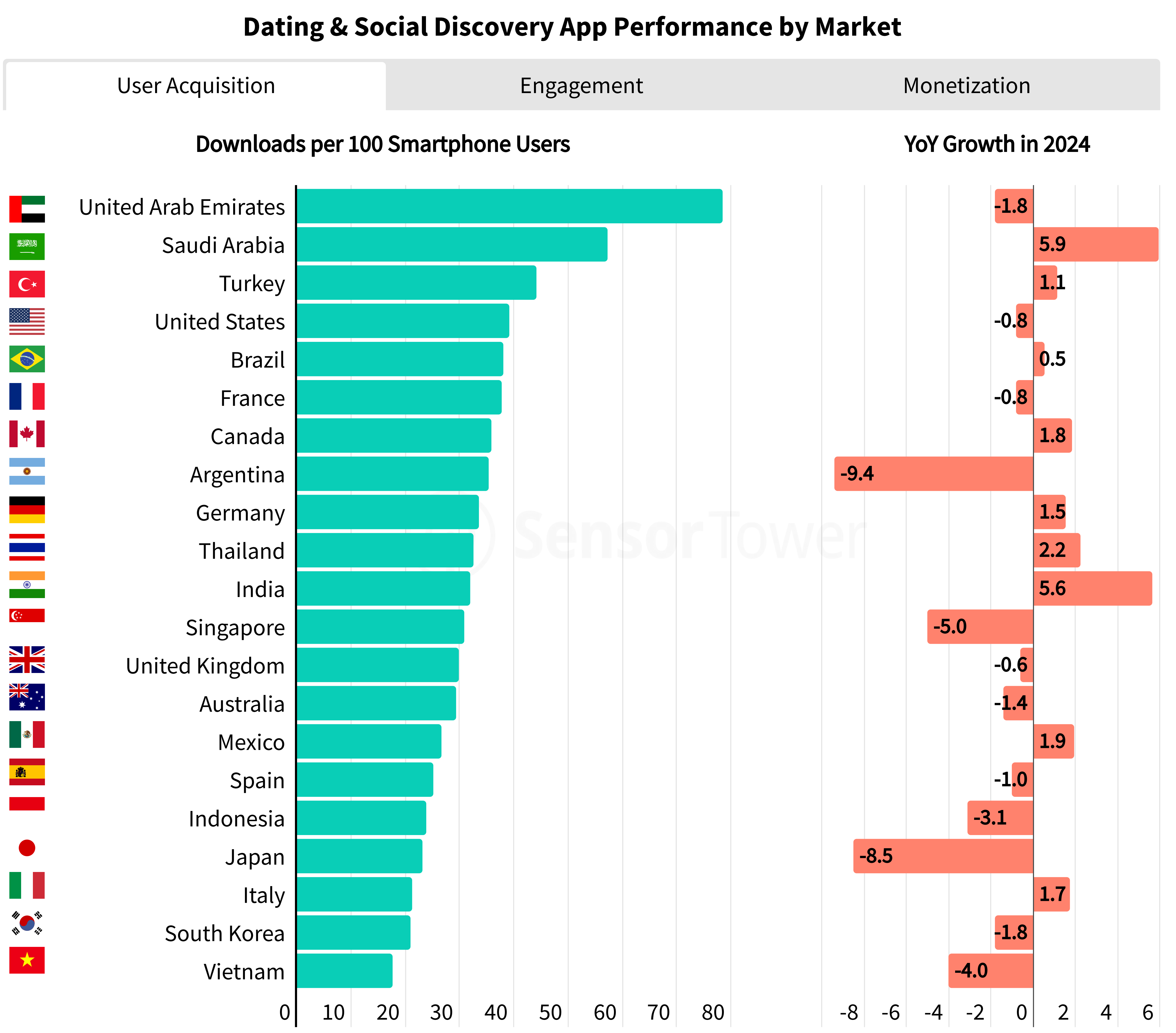
Source: Sensor Tower

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

South Korea Shows Revenue Potential While Dating Apps Gained Users in Saudi Arabaia

The growth stage for the Dating app market varies significantly by market. The UAE, Saudi Arabia, and Turkey provided the best opportunity for downloads (adjusted for the number of smartphone users in each country). France, Brazil, and Australia led the way by time spent per smartphone user, while Japan, South Korea, and the US provided the most revenue per user.

Dating app revenue has continued to climb in most markets despite declining time spent. This suggests that consumers are still willing to pay for Dating apps even as they are spending less time on their phones. Dating apps can benefit from this by incentivizing finding matches and setting up dates quickly rather than mindless scrolling.



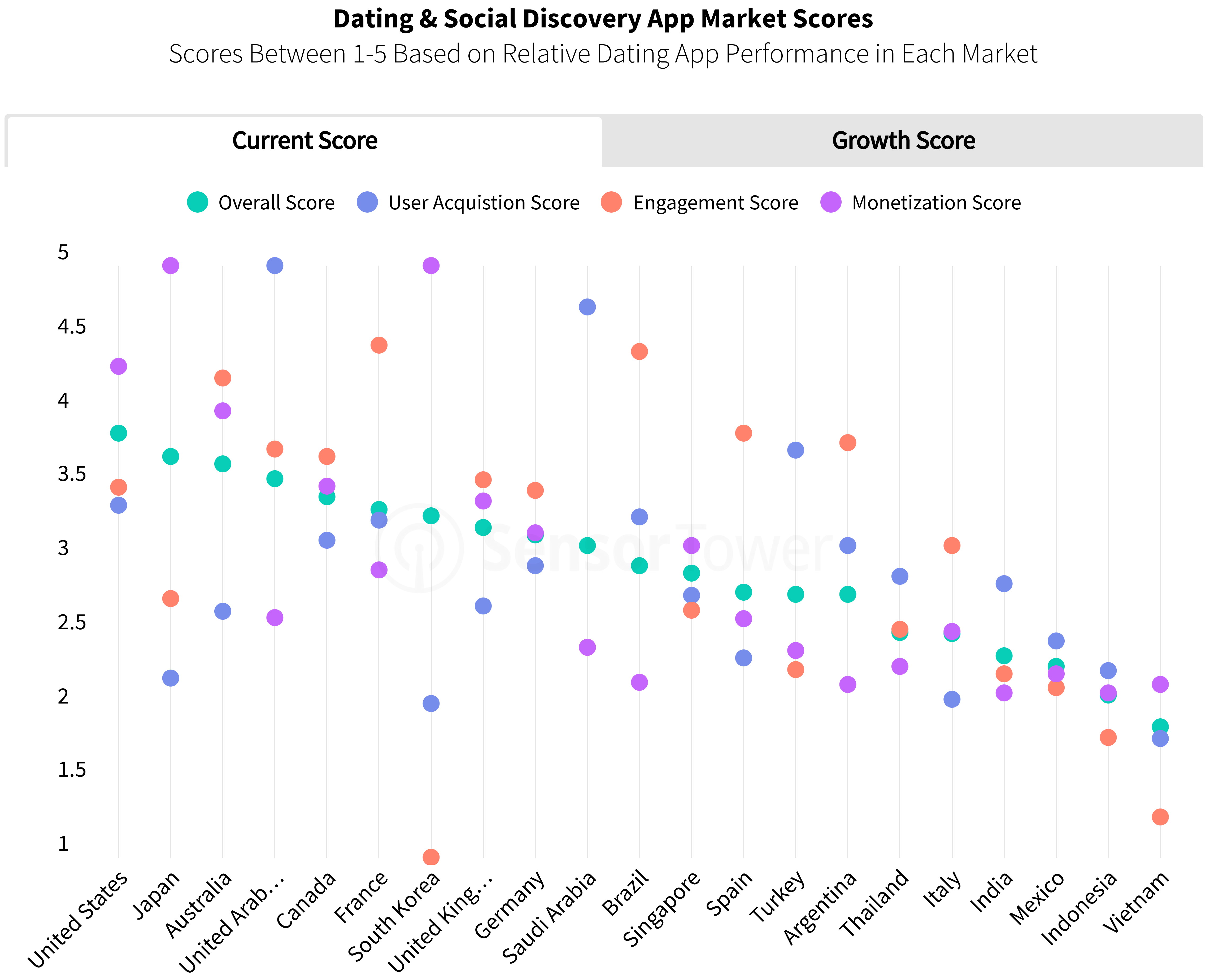
Source: Sensor Tower
Note: iOS and Google Play combined. Revenue is gross — inclusive of any percent taken by the app stores. Apps classified using Sensor Tower's taxonomy as of January 5, 2025.

Dating

Is the US Dating Market Oversaturated?

While the US remained the top market for Dating apps in 2024, its growth was at or below average by most metrics. Downloads declined slightly year-over-year and time spent fell nearly 8%. IAP revenue growth was solid at +13% YoY, though this was below the 23% YoY revenue growth seen across all non-game apps in the US.

Which markets showed the highest potential for Dating apps in 2024? South Korea and Australia saw huge revenue growth, while India and Saudi Arabia displayed gains for adding new users and time spent. Turkey and Italy were two markets that had solid performance across the three metrics analyzed.



Source: Sensor Tower
Note: iOS and Google Play combined. All country-level figures are normalized by estimates for the number of smartphones in each country. Input variables include downloads per smartphone user (User Acquisition), time spent per smartphone user (engagement), and IAP revenue per unique app-user combination (monetization). Scores are calculated using Z-scores for each metric across the included countries, and rescaled so that scores are between 1 and 5, with a mean of 3. Overall scores are calculated as the weighted average of the three scores (50% monetization, 30% user acquisition, and 20% engagement). Apps classified using Sensor Tower's taxonomy as of January 5, 2025.

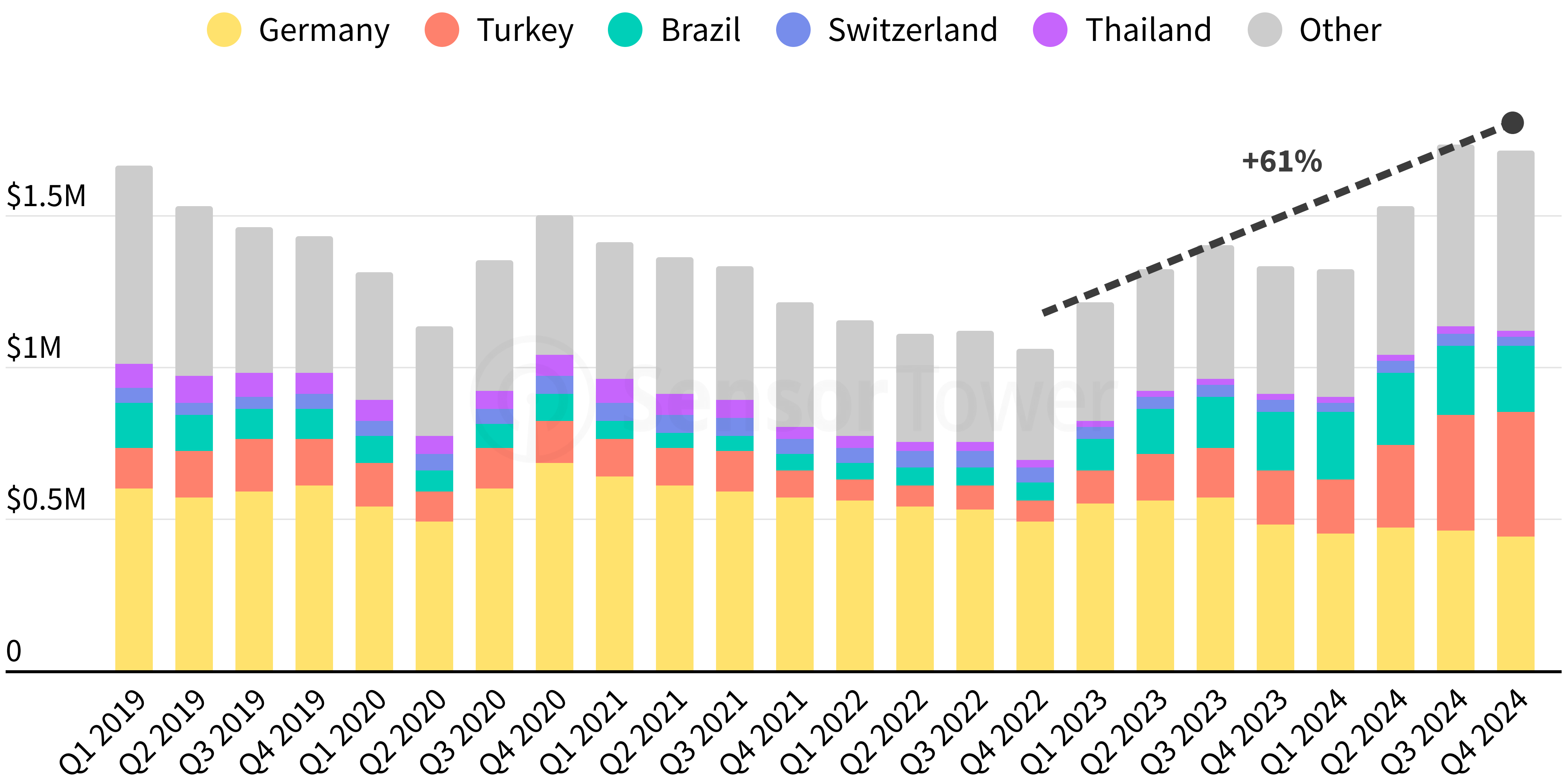
Dating

Jaumo's Pivot to Emphasizing Community Boosted Revenue

Dating apps can also emphasize connecting with communities to stand out in a competitive market. For example, Jaumo began emphasizing joining a community instead of its standard dating and social discovery options in early 2023. Later in the year, the app began promoting specific groups with similar interests such as pet lovers, gamers, and foodies.

Early results for this shift were quite positive — Jaumo's in-app purchase revenue climbed 61% between Q4 2022 and Q4 2024, including particularly strong growth in Turkey and Brazil.

Jaumo Worldwide Quarterly IAP Revenue



March 2023:
Jaumo began emphasizing its community

July 2023:
Jaumo doubled down on its features for finding people with similar interests

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

Dating

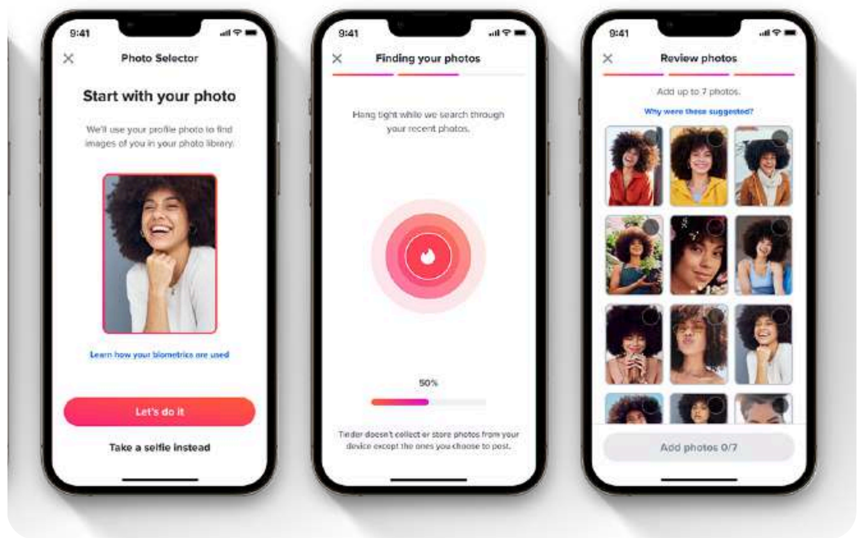
The Next Frontier for Generative AI in Dating Apps is Approaching

Similar to other genres like Health & Fitness, the Dating app leaders have been slow to add AI features, making sure that the tools are well-developed rather than releasing a shoddy product that could alienate their user base. However, the time for AI in Dating has already begun — Tinder recently released its AI-powered Photo Selector feature, and Bumble and Hinge are exploring AI feature options as well. Grindr, meanwhile, announced a longer-term project: an AI "wingman" bot to assist users in finding matches and scheduling dates.

Source: Sensor Tower

Tinder

Tinder was the first of the big four dating apps (Tinder, Bumble, Hinge, and Grindr) to incorporate a major AI feature. In July 2024, Tinder released its AI-powered Photo Selector feature that helps users pick their best profile pictures.



Bumble

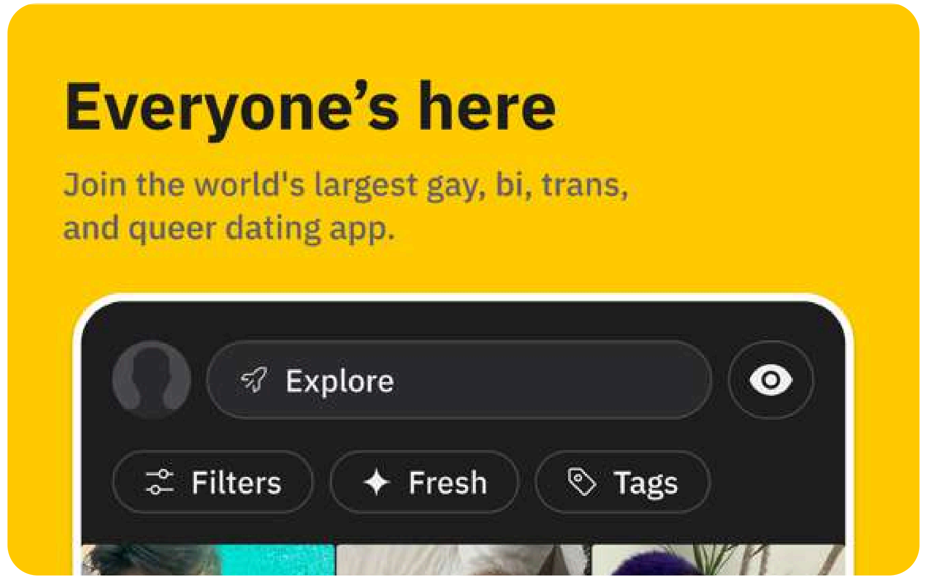
Following up on Tinder's new Photo Selector feature, Bumble announced that it would be investing more in AI as well. Bumble will add an AI-assisted photo picker, conversation support, and some additional features to help with profile creation in the winter (late 2024 - early 2025). Bumble For Friends, Bumble's Social Discovery app, launched AI-Powered Icebreakers in late 2023.

Hinge

Hinge has yet to roll out a major AI feature, citing sticking to it's principles rather than releasing a rushed product. According to Hinge's AI principles, "We believe in using AI as a guide to help daters intentionally connect; we don't believe AI should distract you from finding authentic and meaningful connections." Currently, Hinge uses AI under the hood for a personalized experience and has a few optional AI tools.

Grindr

Grindr is planning AI features beyond photo selectors. In October 2024, Grindr announced that it is testing an AI "wingman", or bot, to help recommend matches for long-term relationships and schedule dates. Grindr says that the new bot will be ready"by 2027 at the latest."



2024 Rankings by Market | Dating

AMER - Downloads

	Worldwide	United States	Canada	Mexico	Brazil	Argentina
1	OmeTV (Dating)	Tinder Dating App (Dating)	Hinge (Dating)	Tinder Dating App (Dating)	Timo Club (Social Discovery)	Tinder Dating App (Dating)
2	Tinder Dating App (Dating)	Bumble Dating App (Dating)	Tinder Dating App (Dating)	Bumble Dating App (Dating)	Tinder Dating App (Dating)	OmeTV (Dating)
3	Bumble Dating App (Dating)	Hinge (Dating)	Bumble Dating App (Dating)	Litmatch (Social Discovery)	Badoo (Dating)	Kismia (Dating)
4	Litmatch (Social Discovery)	OmeTV (Dating)	OmeTV (Dating)	Badoo (Dating)	ComLive (Dating)	Bumble Dating App (Dating)
5	Badoo (Dating)	Hily (Dating)	Badoo (Dating)	iHappy (Dating)	Timo (Social Discovery)	Badoo (Dating)
6	Azar (Social Discovery)	Yubo (Social Discovery)	Yubo (Social Discovery)	Walkie Talkie - All Talk (Social Discovery)	OmeTV (Dating)	happn (Dating)

Download data

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

Sensor Tower × TikTok

Conclusion | Winning on Mobile in 2025 and Beyond

Going Global Isn't Optional Anymore

Competition is now global — and so are the biggest opportunities on mobile. Markets from Japan to Germany to Saudi Arabia provide opportunities for app developers depending on the vertical and mobile growth stage.

Momentum Beyond Q5

Top app developers understand how seasonal consumer behavior trends influence demand in their vertical and markets. These developers think beyond Q5 — gains during Q5 can set you up for success when demand peaks.

Communities Drive Growth

Users are prioritizing quality over quantity for time spent on mobile, and communities enhance user experiences. Top apps leverage the power of communities to drive accountability, rituals, and reasons to return.