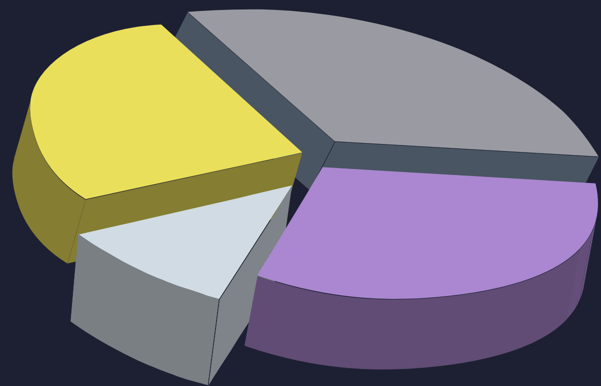
State of the Market 2023

an annual analysis of app market and advertising activities



Apptica

Methodology

The purpose of this study is to analyse the state of app market and advertising activities in 2023.

All data presented in this report has been collected from Apptica platform.

Apps’ categories are defined by a store’s tag.

The basis of this analysis is made up of data from the Apptica's Store, Ad and Market Intelligence sections.

We collect data only from App Store and Google Play, we do not cover other alternative stores.

To obtain accurate results, we have analysed data on 37 countries collected from January 1 to December 31, 2023.

We have not used additional information from other analytical services or resources without mentioning them.

Revenue figures are based on IAP figures, we do not cover other revenue sources. All Revenue is calculated in USD $.

Retention section is still under development and in beta stage. The figures indicated might undergo some changes and slightly differ once Usage Intelligence is released.

In advertising section we have analysed only unique creatives, excluding copies of all sorts.

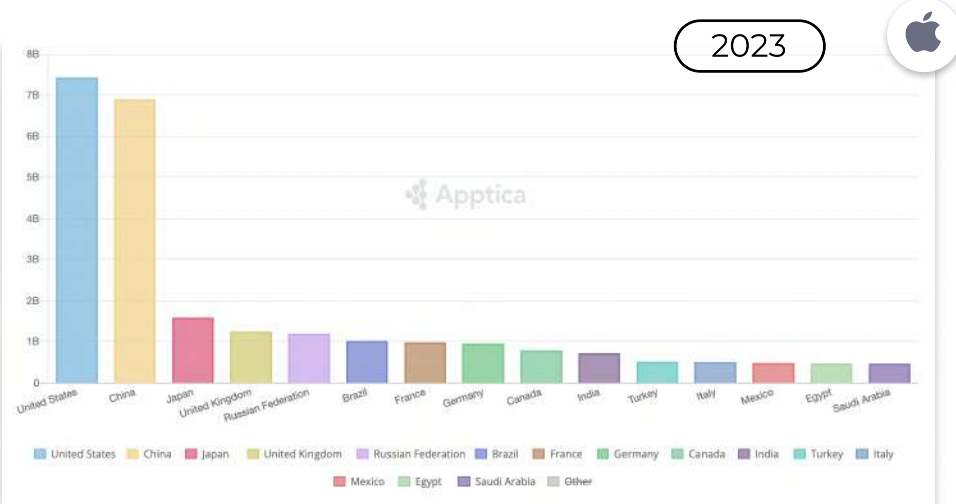
State of Market

2024 will be the final nail in the user level attribution coffin. Apple is set to enforce the ”Privacy Manifest” in 2024, ushering in an era where fingerprinting user clicks and matching them with conversions becomes a thing of the past. Google will follow suit, deploying the privacy sandbox across Web and Android platforms. This move will make non-Google ad platforms struggle with less accurate targeting data, reshaping the digital marketing landscape.

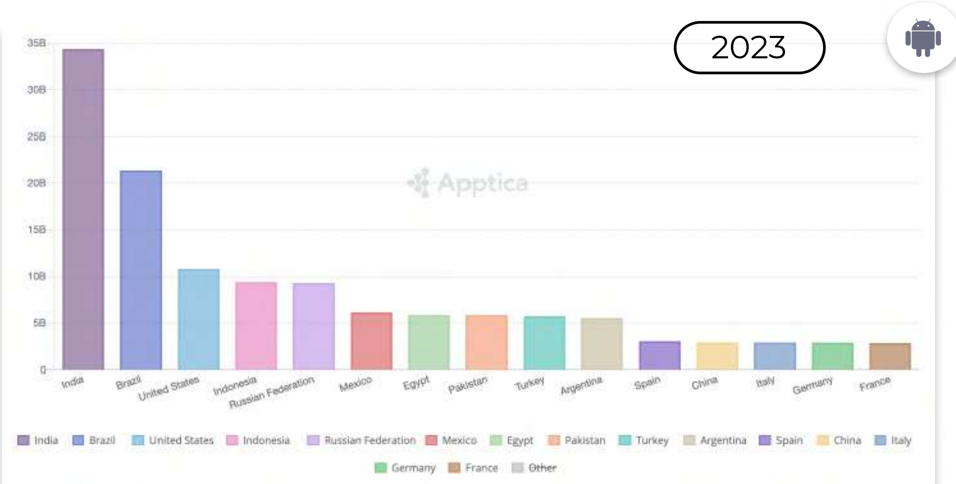
incrmntal

Maor Sadra
CEO & Co-Founder

Top-15 markets | Downloads



Total: >31B



Total: >162B

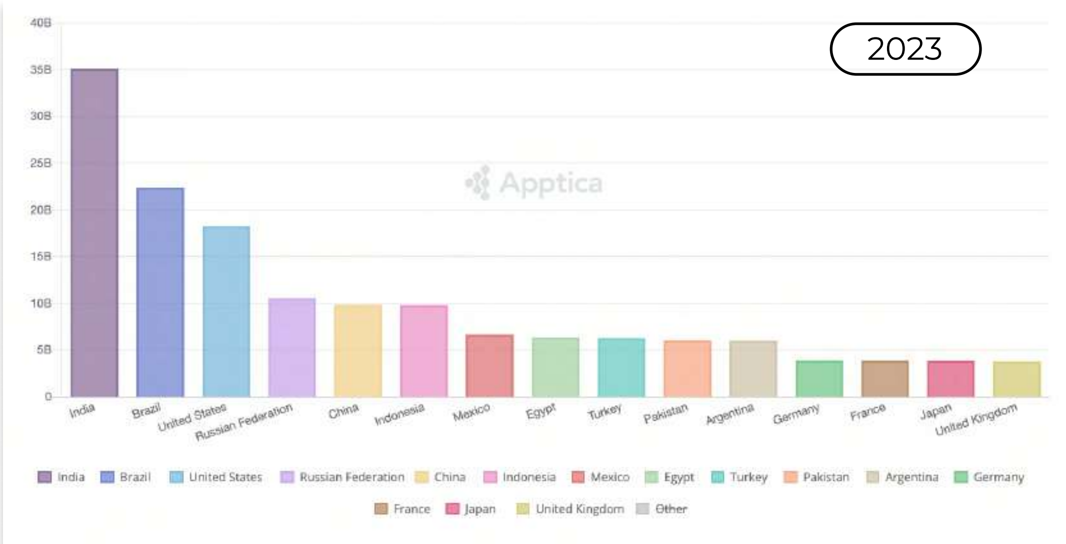
There is a drop (-10%) YoY of downloads with the first 2 leaders remaining the same and demonstrating a growth: US (+6,75%) and China (+2,5%).

The top-15 ranking is joined by Mexico and Egypt this year, replacing Thailand and Vietnam.

All top GEOs enjoy growth except Saudi Arabia and Turkey.

There is a drop (-2,4%) YoY of downloads with the leaders at the same positions: India (+10,4%), Brazil (+8,3%), United States (-5,1%).

Top-15 markets | Downloads



Total: >193B.

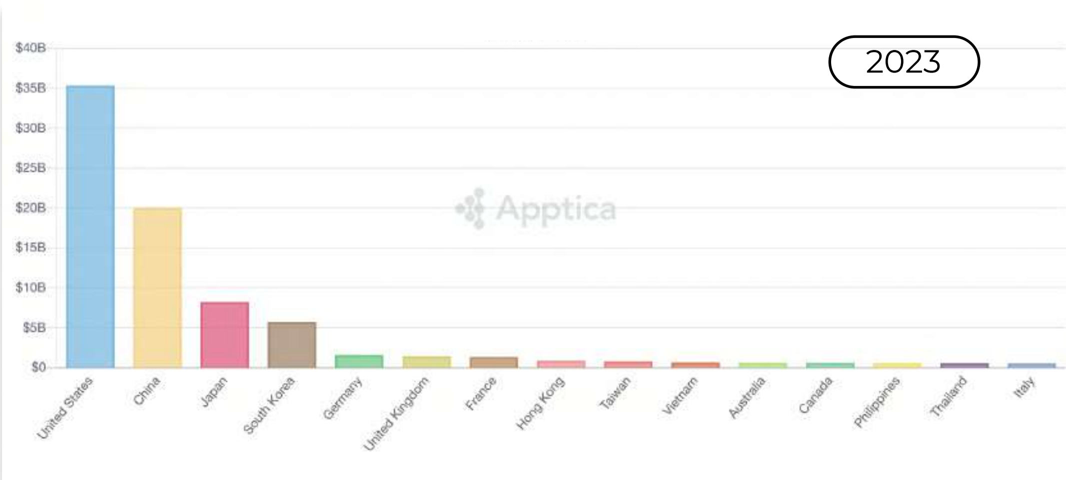
Overall, the market demonstrates a slight decline (-3,6%) YoY of downloads.

India (+10,3%), Brazil (+8,1%), United States (-0,7%) are the top-3 markets.

Russia (+11,2%), China (+10,9%), Pakistan (+12%), Germany (+6,4%), Japan (+2,7%), UK (+8%) enjoy growth while Indonesia (-2%), Mexico (-18,5%), Turkey (-4,8%), France (-1%) suffer a drop.

Egypt, Argentina get into ranking in 2023. replacing Thailand and Spain.
Android covers 84% of all installs WW.

Top-15 markets | Revenue



Total: >$107B.

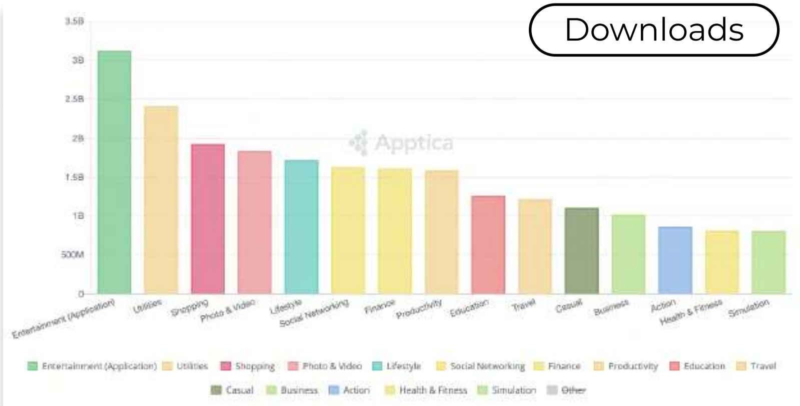
US, China and Japan keep the first 3 positions covering 58% of the total spend.
In total, 2 platforms combined lost 1% of revenue YoY.

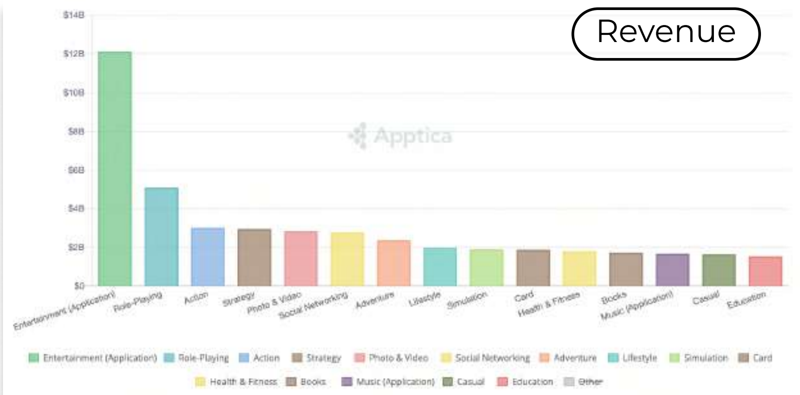
Hong Kong, Australia, Vietnam join the top-ranking this year.

South Korea enjoys the biggest growth of 22%.

iOS cover 67% of all spend.

Top verticals on iOS





Downloads: The Top-12 categories remain their positions. The shifts take place at the end of the ranking with Simulation replacing Food&Drink category in 2023.

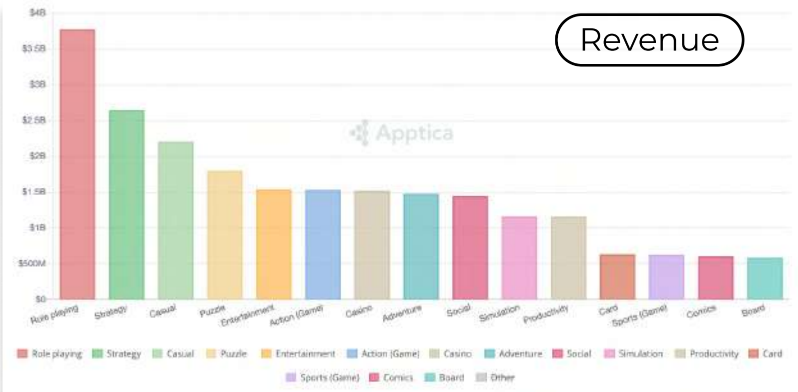
Aggregated, gaming takes the lead with 6.3B of downloads in total.

All verticals suffer a slight decline of downloads YoY.

Revenue: Gaming, Entertainment and Photo&Video are the grossing leaders.

However, Photo&Video is the only vertical in the ranking that has generated more installs YoY (+3,26%). Gaming and Entertainment have declined by 6,7% and 8,45% correspondingly.

Top verticals on Android



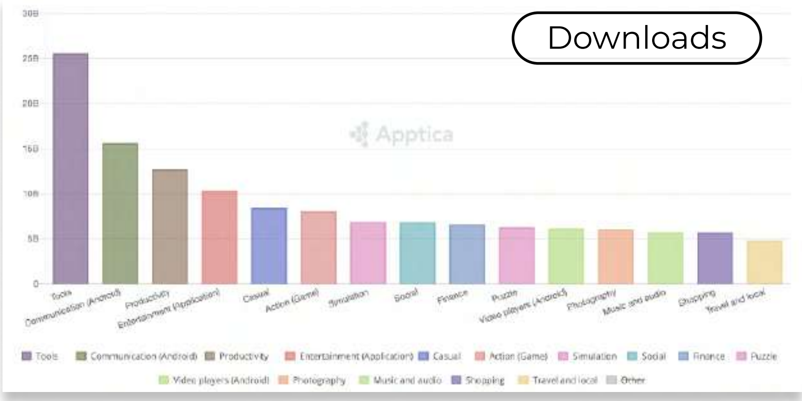
Downloads: In total, there is a slight decline of 2% in aggregated installs.

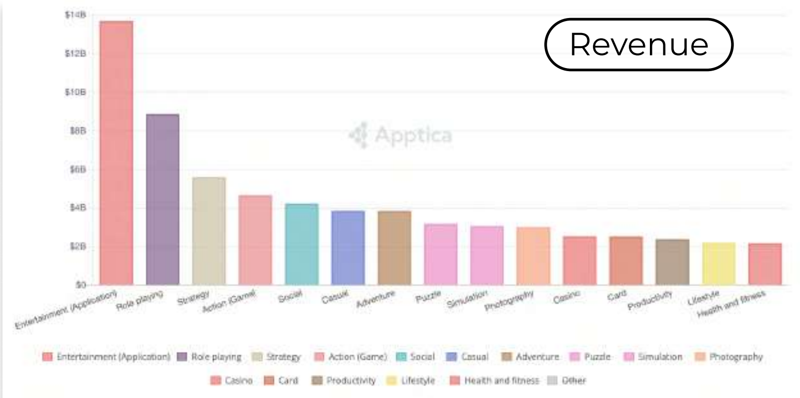
In non-gaming niche, communication (+1,7%), productivity (+9,4%), finance (+1,4%) have a positive trend.
Social suffer the biggest drop of 8,3%.

Gaming takes the lead with >51B of downloads in total, that is less by 2% than in 2022.

Revenue: Gaming, Entertainment and Social are the grossing leaders covering 78% of a total spend.

Top verticals | Platforms combined





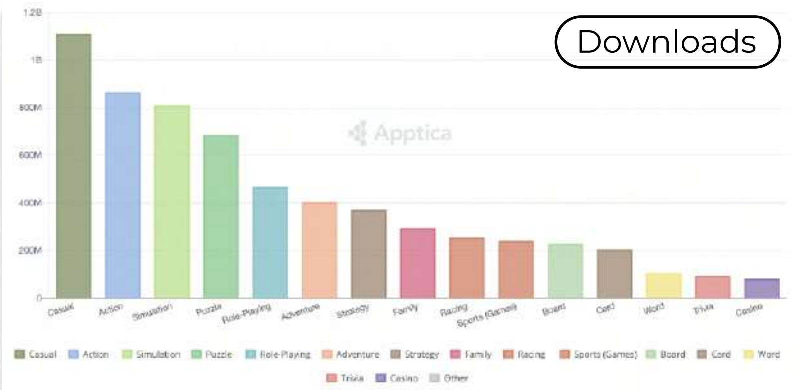
Downloads: All the leaders remain their positions with minor shifts at the middle and at the end of the ranking. Simulation outperforms Social pushing it to the 8th position. Puzzle takes the 10th position, winning 3 ranks compared to 2022.

Gaming is the top vertical with 58,51B of downloads in total.

In non-gaming niche Tools (-1,47%), Photography (-3%), Shopping (-4,8%), Travel and local (-2,6%), Music and audio (-5,1%), Video players (-5%) demonstrate a decline. Social dropped the most (-8,3%).

Revenue: Gaming, Entertainment and Social keep being the grossing leaders compared to 2022 despite a drop in revenue YoY.

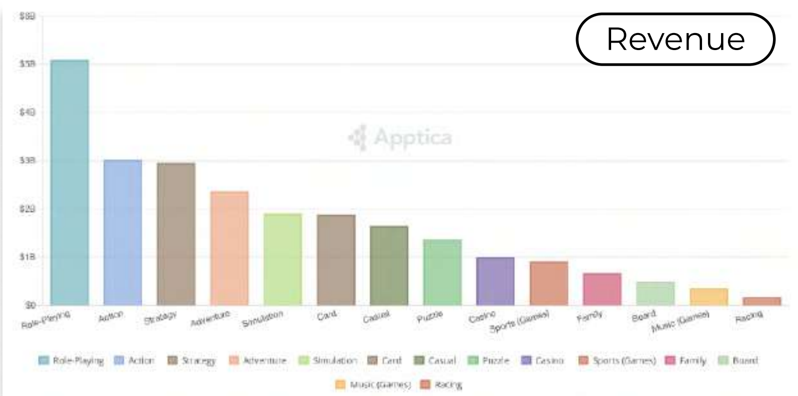
Gaming subgenres on iOS



The total is >6B

Casual, Action and Simulation take top-3 position.

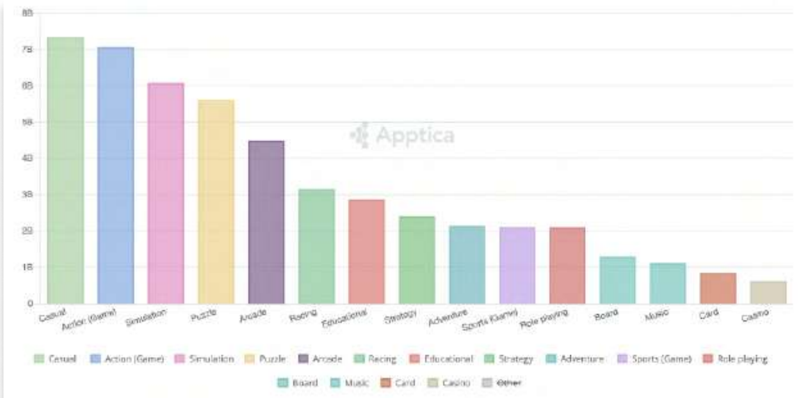
All subgenres suffer a slight decline of downloads YoY with gaming, in general, losing a share of 9.75%.



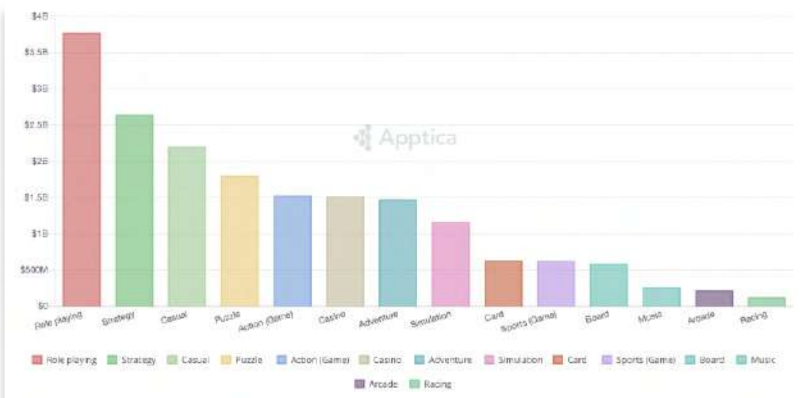
The total is >$35B.

RPG demonstrates a gradual decline in the past two years, with revenue falling by 12% of total share. However, RPG still ranks as the top-grossing genre. All other genres demonstrate a negative revenue trend as well.
In general, gaming lost a share of 6.7% YoY.

Gaming subgenres on Android



The total is >51B.



The total is >$20B.

Casual, Action and Simulation are the leaders in terms of downloads. Casual (+0,27%) outperformed Action (-4,3%) compared to 2022.

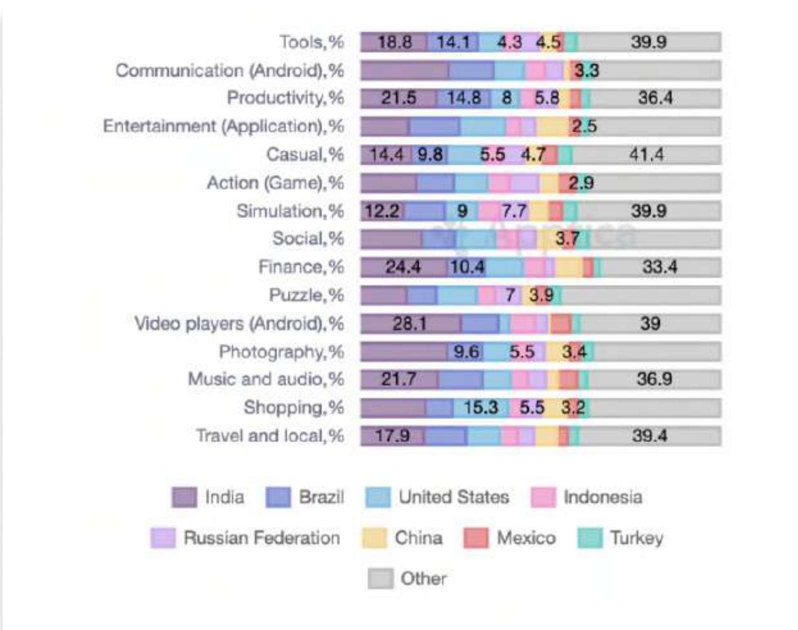
Simulation (+5%), Puzzle (+5,25%), Sports(+1%), Board (+4%), Card (+4,8%) show an upward trend.

Action (-4,3%), Arcade (-10%), Racing (-5%), Educational (-0,7%), Strategy (-8%), RPG (-12%), Music (-5%) experience a decline with Adventure demonstrating the biggest negative trend (-17%).

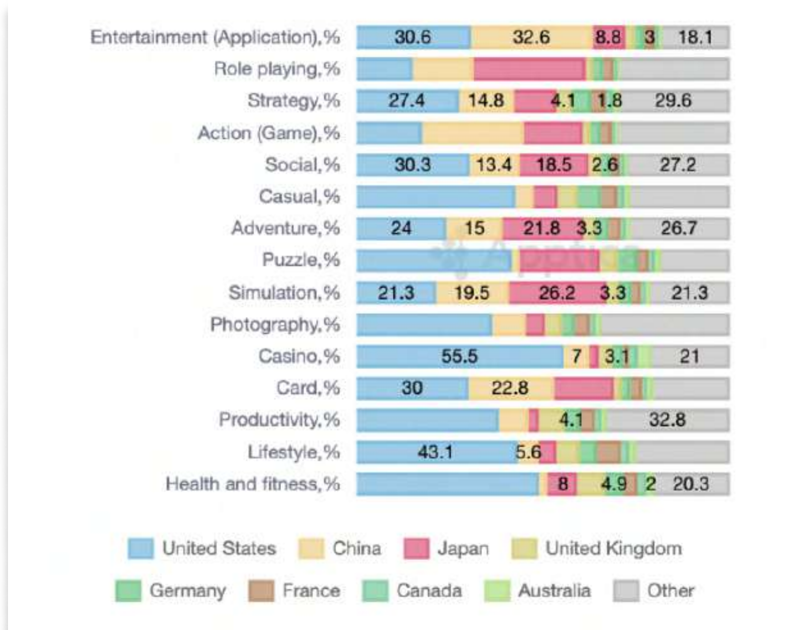
RPG takes the first place (despite negative trend) followed by Strategy and Casual. The ranking remains almost the same with Puzzle getting to the 4th place leaving Action behind.

Country and vertical correlation

Downloads



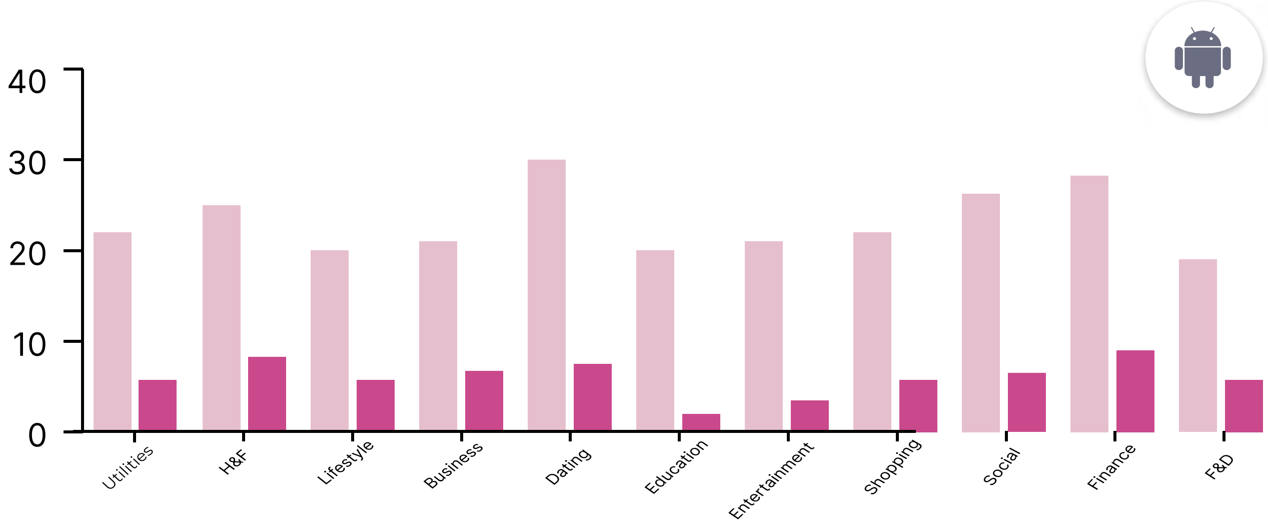
Revenue

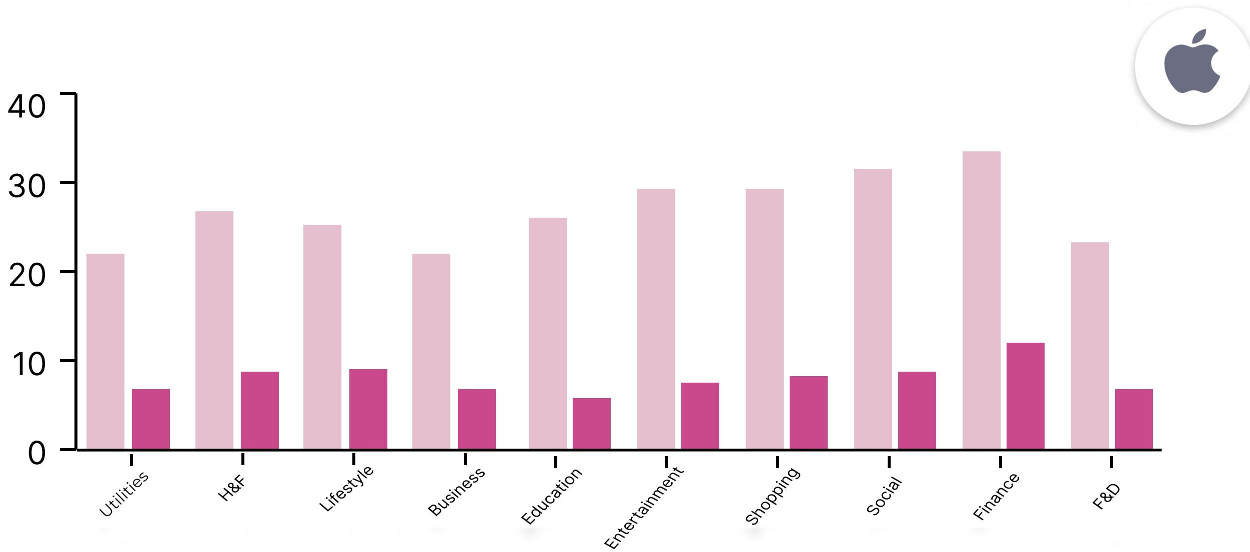


As India is the biggest market for downloads, it takes the biggest share in top verticals.

US covers the largest share in the majority of the verticals. Japan keeps its position as a grossing leader in Simulation (26,2%), RPG (30,1%), while China outperforms US in Action (27,3%) and Entertainment (32,65). More than a half and almost a half (49,9%) of all revenue in Casino and H&F are coming from the USA.

Retention. Non-gaming verticals





R1 R30

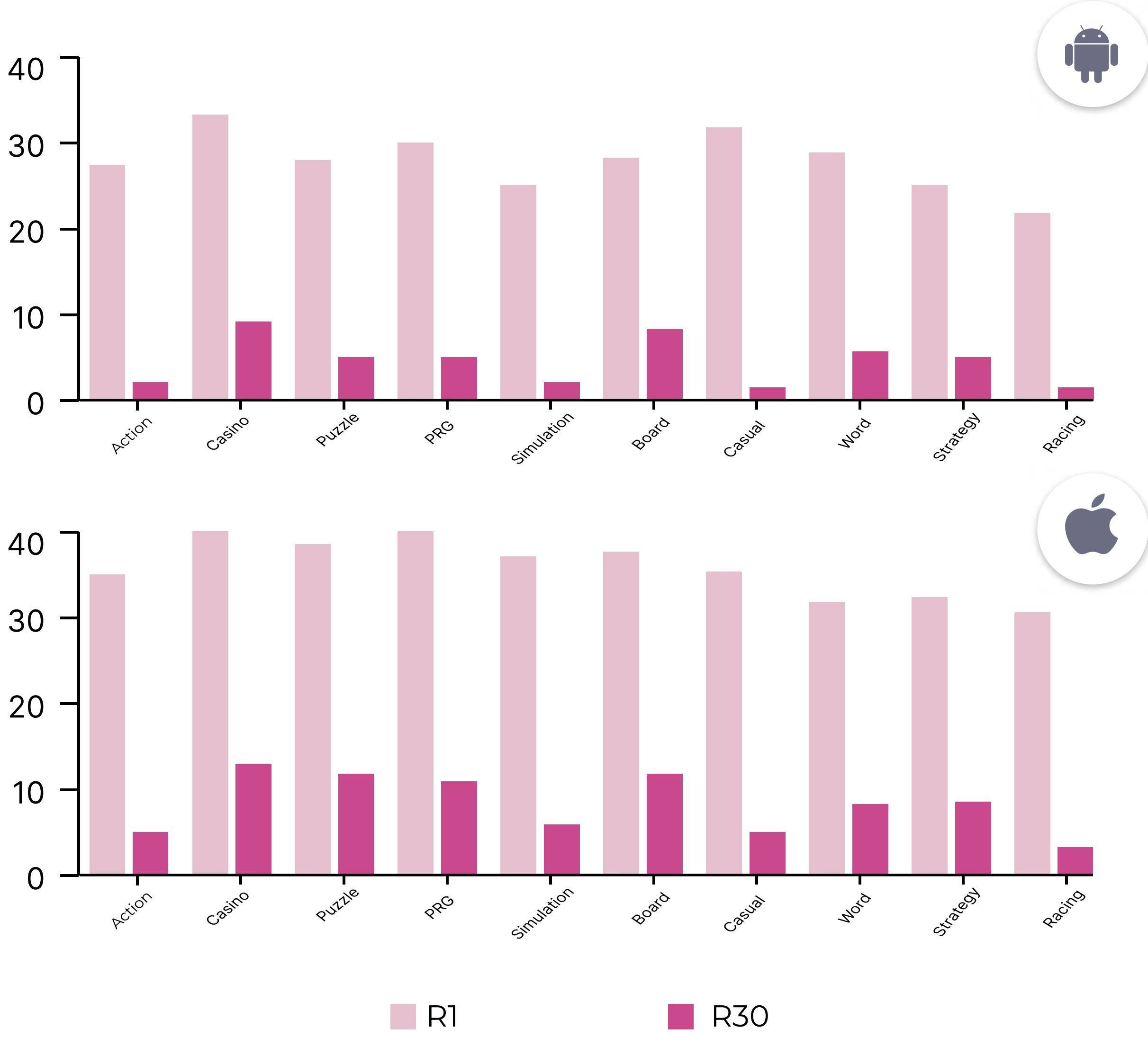
The R1 leaders on Android and iOS are Dating (30,52%) and Finance (32,3%) correspondingly.

Finance (9.6% Android, 12,7% iOS) has the highest R30 on both platforms.

iOS has the higher R1 among the indicated verticals except Utilities (21,54% Android vs 21% iOS).

Business (6.87%) and Utilities (5.8%) demonstrate a bit higher R30 on Android.

Retention. Gaming



The R1 leaders on Android and iOS are Casual (31%) and Casino (40,6%) correspondingly.

Casino (9.1% Android, 13,6% iOS) has the highest R30 on both platforms.

iOS has the higher R1, R30, an average benchmark among the indicated sub-genres than Android.

Average R1 in gaming: 32,4

Average R30 in gaming: 6,6

Top games | Downloads

Android

		Downloads
1.	Subway Surfers	225,4 M
2.	Candy Crush Saga	199 M
3.	Roblox	195 M
4.	Free Fire: Winterlands	180 M
5.	Ludo King	160,8 M
6.	Free Fire MAX	133,3 M
7.	My Talking Tom 2	123,7 M
8.	Block Blast!	122,3 M
9.	My Talking Tom Friends	110,2 M
10.	8 Ball Pool	109,2 M

iOS

		Downloads
1.	蛋仔派对	45,9 M
2.	MONOPOLY GO!	44,2 M
3.	Royal Match	42,8 M
4.	Roblox	41,5 M
5.	Subway Surfers	35,4 M
6.	Block Blast!	25,6 M
7.	Gardenscapes	25,5 M
8.	Magic Tiles 3: Piano Game	22,4 M
9.	8 Ball Pool	21,8 M
10.	My Perfect Hotel	21,2 M

Top games | Revenue

Android

	Game	Revenue
1.	Coin Master	425,9 M
2.	MONOPOLY GO!	415 M
3.	Candy Crush Saga	369 M
4.	Roblox	326 M
5.	Royal Match	326 M
6.	Pokémon GO	222,6 M
7.	Genshin Impact	202,9 M
8.	Gardenscapes	195, 7 M
9.	ウマ娘 プリティーダービー	177,4 M
10.	Puzzles & Survival	159 M

iOS

	Game	Revenue
1.	王者荣耀	1,5 B
2.	和平精英	611,5 M
3.	MONOPOLY GO!	609 M
4.	Roblox	398 M
5.	Royal Match	387,7 M
6.	Candy Crush Saga	349,7 M
7.	原神	336,4 M
8.	Coin Master	298 M
9.	Gardenscapes	292 M
10.	モンスターストライク	280,8 M

Top social | Downloads

Android

		Downloads
1.	Facebook	888,3 M
2.	Instagram	673,3 M
3.	TikTok	493,7 M
4.	Facebook Lite	369,6 M
5.	TikTok Lite	273 M
6.	Instagram Lite	149,5 M
7.	X	123,7 M
8.	XClub	114,3 M
9.	Bigo Live - Live Streaming App	86,7 M
10.	Threads, an Instagram app	80,6 M

iOS

		Downloads
1.	Instagram	111,7 M
2.	WhatsApp Messenger	106,5 M
3.	Telegram Messenger	97,6 M
4.	Gmail - Email by Google	86,9 M
5.	Facebook	81 M
6.	Snapchat	61,9 M
7.	Messenger	61,6 M
8.	WeChat	57 M
9.	小红书 – 你的生活指南	56,3 M
10.	X	50 M

Top social | Revenue

Android

	App	Revenue
1.	TikTok	628,9 M
2.	Bigo Live - Live Streaming App	69,2 M
3.	Grindr - Gay chat	45 M
4.	Pococha - Chat, Live streaming	44,2 M
5.	Chamet - Live Video Chat&Meet	43,7 M
6.	Facebook	41,8 M
7.	Tango- Live Stream, Video Chat	27,7 M
8.	Who - Live Video Chat	24,7 M
9.	Poppo live	18,3 M
10.	Instagram	16,8 M

iOS

	App	Revenue
1.	Tinder: Dating, Chat & Friends	584,8 M
2.	Bumble: Dating & Friends App	244,6 M
3.	Hinge Dating App: Match & Date	134,3 M
4.	BOSS直聘-招聘求职找工作神器	130,9 M
5.	Grindr - Gay Dating & Chat	117,3 M
6.	LINE	110 M
7.	BIGO LIVE-Live Stream, Go Live	99,9 M
8.	Snapchat	98,7 M
9.	Life360: Find Friends & Family	86,9 M
10.	Instagram	84,2 M

Top education | Downloads

Android

		Downloads
1.	Duolingo: Language Lessons	119,6 M
2.	Brainly: AI Homework Helper	39,8 M
3.	Photomath	28,5 M
4.	Google Classroom	26,7 M
5.	Unacademy: Learn & Crack Exams	14,9 M
6.	Bible App for Kids	13,6 M
7.	Buddy.ai: Fun Learning Games	12,5 M
8.	OckyPocky : English For Kids	10,7 M
9.	Superbook Kids Bible App	9,7 M
10.	Minecraft Education	9,5 M

iOS

		Downloads
1.	Duolingo: Language Lessons	38 M
2.	学信网	18 M
3.	Photomath	13,3 M
4.	驾考宝典-科一科四驾驶证考试驾考通	13 M
5.	作业帮-中小学家长作业检查和辅导工具	12,9 M
6.	智慧中小学-国家中小学智慧教育平台	11 M
7.	Google Classroom	11 M
8.	学习通	10,3 M
9.	百度文库-AI专业文档总结报告资料库	10,1 M
10.	学习强国	9,9 M

Top education | Revenue

Android

		Revenue
1.	Duolingo: Language Lessons	75,9 M
2.	Babbel - Learn Languages	14,5 M
3.	PictureThis - Plant Identifier	11,8 M
4.	Udemy - Online Courses	9,3 M
5.	ClassDojo	7,6 M
6.	Headway: 15-Min Book Summaries	7 M
7.	말해보카: 영단어, 문법, 리스닝, 스피킹, 영어 공부	5,2 M
8.	Blinkist: Book Summaries Daily	5 M
9.	Simply Piano: Learn Piano Fast	3,7 M
10.	Learn 33 Languages - Mondly	3,3 M

iOS

		Revenue
1.	Duolingo: Language Lessons	193,7 M
2.	PictureThis - Plant Identifier	66,9 M
3.	Babbel - Language Learning	48,3 M
4.	Headway: Daily Book Summaries	40,9 M
5.	Simply Piano: Learn Piano Fast	28,7 M
6.	Chegg Study - Homework Help	24,9 M
7.	Photomath	24,7 M
8.	Blinkist: Book Summaries Daily	24,7 M
9.	ClassDojo	23,2 M
10.	PlantIn: Plant Identifier	22,6 M

Top shopping applications | Downloads

Android

		Downloads
1.	vivo.com	189,9 M
2.	Temu: Shop Like a Billionaire	185,2 M
3.	SHEIN-Shopping Online	174,3 M
4.	Meesho: Online Shopping App	123,4 M
5.	Flipkart Online Shopping App	115,7 M
6.	Amazon Shopping	101,4 M
7.	Alibaba.com - B2B marketplace	91,4 M
8.	Shopsy Shopping App - Flipkart	84,7 M
9.	AliExpress	70,3 M
10.	Lazada - Online Shopping App!	67,4 M

iOS

		Downloads
1.	Temu: Shop Like a Billionaire	90,5 M
2.	SHEIN-Shopping Online	62,7 M
3.	小红书 – 你的生活指南	56,3 M
4.	拼多多 - 多多买菜，百亿补贴	45,6 M
5.	京东-京东买年货，又好又便宜	36,8 M
6.	淘宝 - 太好逛了吧	35,7 M
7.	闲鱼 - 闲不住？上闲鱼！	28,7 M
8.	Amazon Shopping	28,3 M
9.	Nike: Shoes, Apparel, Stories	22,4 M
10.	识货-运动潮流的好物和好价	22,3 M

Top finance | Downloads

Android

		Downloads
1.	Google Pay: Save and Pay	274,5 M
2.	Google Wallet Saga	215,8 M
3.	PhonePe UPI, Payment, Recharge	121,5 M
4.	Paytm: Secure UPI Payments	99 M
5.	FinShell Pay	78 M
6.	Airtel Thanks – Recharge & UPI	68,5 M
7.	PayPal - Send, Shop, Manage	45,2 M
8.	Nubank: conta, cartão e mais	36,5 M
9.	DANA Indonesia Digital Wallet	34,6 M
10.	Bajaj Finserv: UPI,Loan,FD,MF	30 M

iOS

		Downloads
1.	Alipay - Simplify Your Life	44 M
2.	PayPal - Send, Shop, Manage	33 M
3.	360借条-手机借钱小额借款分期贷款软件	32 M
4.	个人所得税	22,8 M
5.	中国农业银行	22,7 M
6.	中国工商银行	18,4 M
7.	Cash App	18,2 M
8.	交通银行	18,2 M
9.	中国建设银行	17 M
10.	安逸花-分期借钱信用贷款快速借款平台	15,3 M

Top finance | Revenue

Android

	App	Revenue
1.	TradingView: Track All Markets	8,8 M
2.	QuickBooks Self-Employed	5,5 M
3.	マネーフォワード ME	3,4 M
4.	Atlas Earth - Buy Virtual Land	2,9 M
5.	Investing.com: Stock Market	2,3 M
6.	Mileage Tracker & Log - MileIQ	2,2 M
7.	Finanzguru - Konten & Verträge	2 M
8.	Serasa: Consulta CPF e Score	1, 7 M
9.	Rocket Money - Bills & Budgets	1,7 M
10.	SA Stock Market Analysis, Data	1 M

iOS

	App	Revenue
1.	QuickBooks Self-Employed	25,2 M
2.	QuickBooks Accounting	23,4 M
3.	Invoice2go: Easy Invoice Maker	12 M
4.	TradingView: Track All Markets	11,8 M
5.	同花顺-炒股、股票	11,6 M
6.	マネーフォワード ME - 人気の家計簿(かけい	10,6 M
7.	MileIQ: Mileage Tracker & Log	6,6 M
8.	GardenFinanzguru - Konten & Verträgescapes	3,9 M
9.	確定申告はfreee 会計ソフト - 会計アプリで青色申告	3,5 M
10.	Rocket Money - Bills & Budgets	2,4 M

Top H&F applications | Downloads

Android

		Downloads
1.	Samsung Health	195,2 M
2.	Health Connect (Beta)	160,7 M
3.	My Health	94,9 M
4.	Google Fit: Activity Tracking	51,6 M
5.	Health Platform	50,6 M
6.	Home Workout - No Equipment	28,4 M
7.	Flo Period & Pregnancy Tracker	20,8 M
8.	Blood Pressure App	20,7 M
9.	Sweatcoin - Step Counter	16,6 M
10.	HONOR Health	15,4 M

iOS

		Downloads
1.	Impulse - Brain Training	21,9 M
2.	Flo Period & Pregnancy Tracker	14 M
3.	Keep - 自由运动场	11,6 M
4.	Yuka - Food & Cosmetic scanner	9,8 M
5.	MyFitnessPal: Calorie Counter	9,4 M
6.	美柚 - 经期·备孕·怀孕·育儿	9 M
7.	Planet Fitness Workouts	8,4 M
8.	HUAWEI Health	8,1 M
9.	JustFit: Lazy Workout & Fit	7,9 M
10.	BetterMe: Health Coaching	7,6 M

Top H&F applications | Revenue

Android

		Revenue
1.	Fitbit	52,8 M
2.	MyFitnessPal: Calorie Counter	27,5 M
3.	Strava: Run, Bike, Hike	19,2 M
4.	Flo Period & Pregnancy Tracker	13 M
5.	Calm - Sleep, Meditate, Relax	11 M
6.	AllTrails: Hike, Bike & Run	10,6 M
7.	YAZIO Food & Calorie Counter	9 M
8.	Headspace: Sleep & Meditation	9 M
9.	Replika: My AI Friend	8,5 M
10.	komoot - hike, bike & run	8,2 M

iOS

		Revenue
1.	MyFitnessPal: Calorie Counter	111 M
2.	Flo Period & Pregnancy Tracker	81 M
3.	Strava: Run, Bike, Hike	74,6 M
4.	Calm	65,9 M
5.	Fitbit: Health & Fitness	49,5 M
6.	WeightWatchers: Weight Health	44,9 M
7.	Impulse - Brain Training	42,6 M
8.	GameChanger	42,5 M
9.	Peloton: Fitness & Workouts	42 M
10.	Headspace: Sleep & Meditation	40,9 M

State of Advertising

The mobile industry is currently experiencing a lot of uncertainty and instability due to continuous changes, especially in the area of tracking and privacy. This has made it increasingly difficult to achieve efficiency with our paid acquisition activities. However, we have a great opportunity to focus on the creative side of things. Thanks to the synergy between video dominance and AI-tools, we can enhance the production process and analyze vast amounts of data. This will enable us to create highly targeted and personalized video content.

Lorenzo Rossi
Co-Founder

Top advertisers | distribution share*

Android

	App	Developer
1	Bigo Live - Live Streaming App	Bigo Technology Pte. Ltd.
2	Matchington Mansion	Magic Tavern, Inc.
3	MONOPOLY GO!	Scopely
4	Snapchat	Snap Inc
5	Township	Playrix
6	Gardenscapes	Playrix
7	Badoo: Dating. Chat. Meet.	Badoo
8	Braindom: Brain Games Test	Matchingham Games
9	Fishdom	Playrix
10	Candy Crush Saga	King

Total number of advertisers:
69,5K

Android advertisers cover 63% of traffic

iOS

	App	Developer
1	Vegas Live Slots Casino	PlayDog Soft Co., Ltd
2	Matchington Mansion	Magic Tavern, Inc.
3	Coin Master	Moon Active
4	Royal Match	Dream Games
5	MONOPOLY GO!	Scopely, Inc.
6	Travel Town - Merge Adventure	Magmatic Games Ltd
7	Candy Crush Saga	King
8	Gardenscapes	Playrix
9	Block Blast!	Hungry Studio
10	Age of Origins:Tower Defense	Hong Kong Ke Mo software Co., Limited

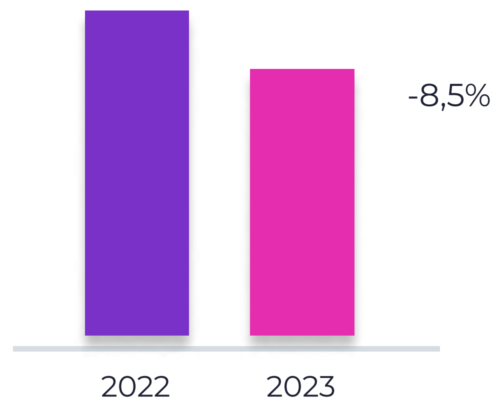
Total number of advertisers:
40,3K

iOS advertisers cover 37% of traffic

There are **109,8K** advertisers in total.

Gaming vertical is a leader with **53%** of advertisers.

The most active are coming from **gaming, social and dating** niches.



Number of advertisers

*distribution share: the share of advertising impressions among all advertisers for the chosen period

Top advertisers | creatives’ number

Android

1	NewsBreak: Local News & Alerts	Particle Media Inc.
2	Rescue Cut - Rope Puzzle	ITI inc.
3	Galaxiga Arcade Shooting Game	1SOFT
4	Shopee CNY Sale	Shopee
5	Shopee 2.2 Live & Video Sale	Shopee
6	Bigo Live - Live Streaming App	Bigo Technology Pte. Ltd.
7	1945 Air Force: Airplane games	1SOFT
8	TikTok	TikTok Pte. Ltd.
9	花舞宫廷	Origin Mood Limited
10	Vegas Live Slots: Casino Games	PLAYDOG

Total number of advertisers:
69,5K

iOS

1	Royal Match	Dream Games
2	Vegas Live Slots Casino	PlayDog Soft Co., Ltd
3	1945 - Airplane shooting game	ONESOFT GLOBAL PTE. LTD.
4	Candy Crush Saga	King
5	Merge Dragons!	Gram Games
6	SHEIN - Shopping Online	ROADGET BUSINESS PTE. LTD.
7	Color by Number： Coloring Games	Fun Games For Free
8	Block Blast!	Hungry Studio
9	MONOPOLY GO!	Scopely, Inc.
10	戀戀清庭:邂逅	丹琳 方

Total number of advertisers:
40,3K

4864
Average number of creatives
777K
Maximum number of creatives
7,2
Average number of networks

12,9K
Average number of creatives
1,8M
Maximum number of creatives
7,5
Average number of networks

Top publishers | buying share

Android

1	Playrix
2	Bigo Technology ...
3	Magic Tavern, Inc.
4	Scopely
5	Matchingham Ga...
6	Shopee
7	Snap Inc
8	Easybrain
9	Badoo
10	King
11	SpinX Games Limi...
12	TikTok Pte. Ltd.
13	Binance Inc.
14	Revolut Ltd
15	Meta Platforms, I...

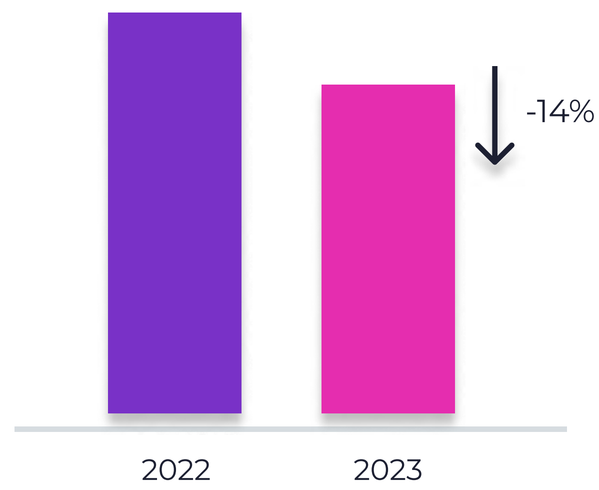
Total number of publishers:
42,9K

iOS

1	Playrix
2	Magic Tavern, Inc.
3	PlayDog Soft Co., ...
4	Moon Active
5	Dream Games
6	Scopely, Inc.
7	King
8	Magmatic Games ...
9	Hong Kong Ke Mo...
10	Hungry Studio
11	Century Games Pt...
12	PeopleFun, Inc.
13	Easybrain
14	BIGO TECHNOLO...
15	Popcore GmbH

Total number of publishers:
24,9K

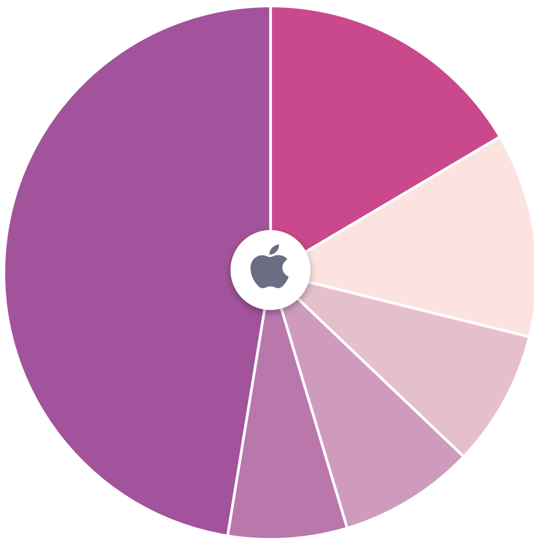
The most active publishers pertain to gaming vertical, joined by social, shopping.
Total: 67,8K



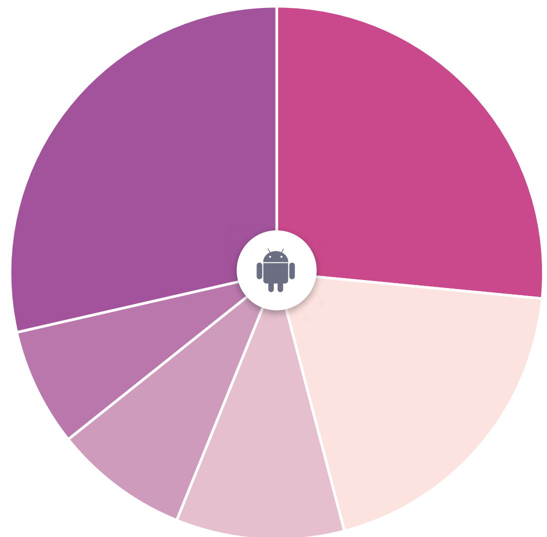
Number of publishers

Advertising traffic by gaming category

The gaming led with more than 78,6% of advertising traffic on App Store and 52,5% on Google Play. The biggest traffic share on both platforms together is covered by Puzzle and Casual. On Android Puzzle takes 1/4 of all ad gaming traffic.



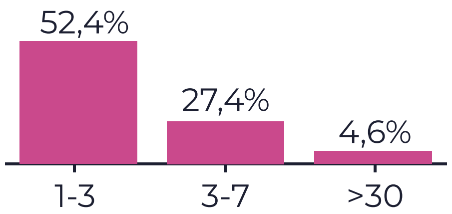
Puzzle	16,9%
Casual	12,5%
Card	8,3%
Adventure	8,1%
Strategy	7,3%
Other	46,9%



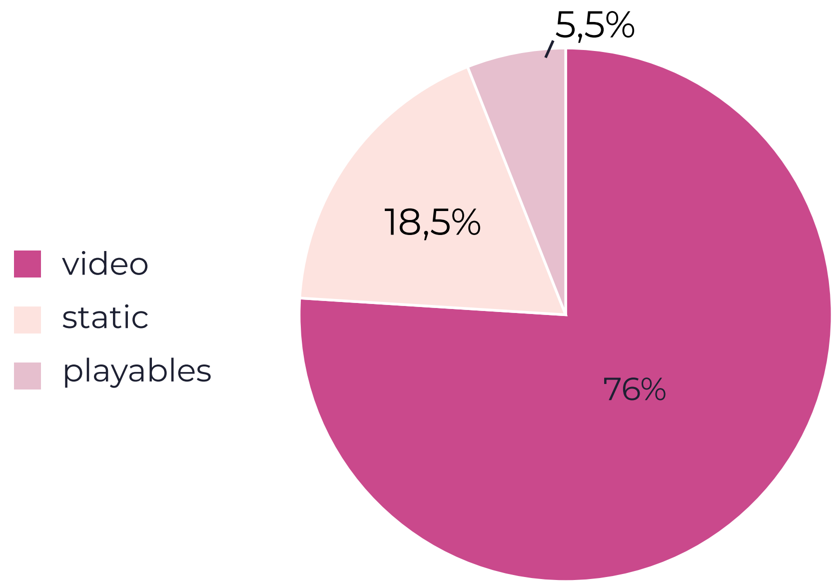
Puzzle	26,8%
Casual	19,6%
Board	10%
Casino	8%
Word	7,7%
Other	27,9%

Creative cycle and format on iOS

1% creative score (top-perfoming creatives):
105K (0,8% of total)



running period of creatives (days)

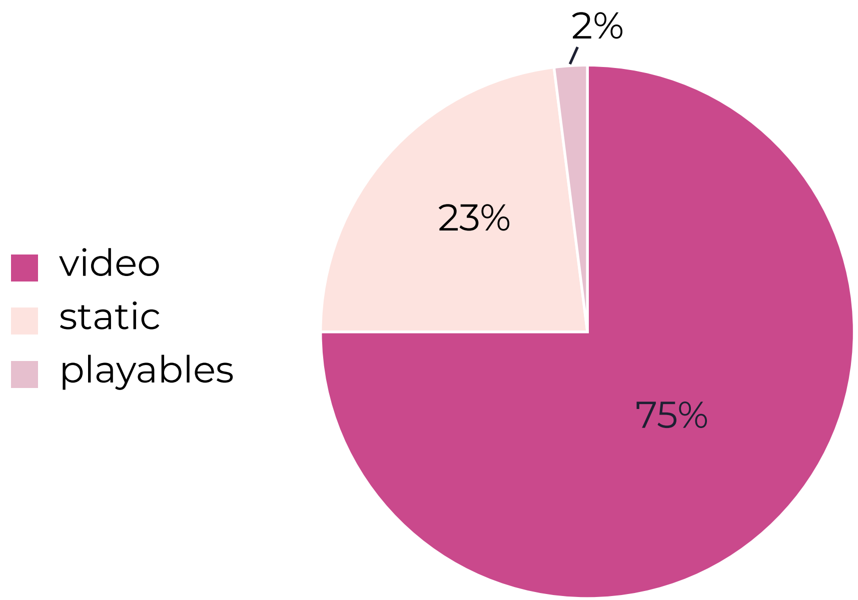


Total number of creatives on iOS:
12,4 mln

The more we spend on a project, the more resources we allocate to the promo department for coming up with new concepts of creatives and generating additional variations of the existing ones. In our case, conscious elaboration of hypotheses and operation with performing elements have proved to be more effective than creative searching and trying spontaneous options. With the appearance of custom landing pages, the winning creative search has become even more tricky, but at the same time, there are more tactical options available now. In fact, winning creatives can run in campaigns for quite a long time (several months or even up to a year instead of 30 days). The positive point is that part of the workload can be allocated to AI services, which are now getting better and better.

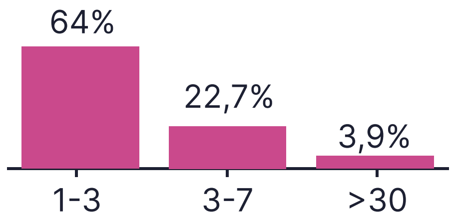
Kirill Zhukovsky
Chief Product Officer

Creative cycle and format on Android



Total number of creatives:
30,3 mln

1% creative score (top-perfoming creatives):
283,3K (0,9% of total)



running period of creatives (days)

Video share keeps growing both on iOS (+16%) & Android (+37%). Interactive format shows a positive dynamics on iOS (+2,7%) and a negative one on Android (-0.5%).
Android remains the more saturated platform with creatives (71%) despite a growing share of iOS creatives (+9,2%). In general, there have been much more creatives in rotation in 2023.

More than a half of all creatives are dropped within the first 3 days, more than 1/5 are dropped within a week. Only 4,6%of creatives (on iOS) and 3,9$ (on Android) run for more than a month.

General trends in mobile creatives

- Popularity of miss-leading creatives is fading
- UGC is a great channel that caters to authenticity trend, such creatives are gaining popularity outside TikTok network
- Successful blend of UGC + Influencers that helps with a targeting in our pro-privacy industry
- Gaming vertical is a trend-setter, applications borrow the elements and performing mechanics from games. In general, there is an expanding trend of gamified ads
- For 2024 we expect more creatives powered by AI and more tests with hybrid formats (video + playable endcard, UGC video + playable part)

In 2024, we will see more and more experimentation with hybrid formats and visual techniques as advertisers chase performance. It will be crucial for publishers to find the perfect creative mix that is channel-specific; the one-size-fits-all mindset will no longer cut it.

UGC is no longer just a bit-part player in a publisher's creative strategy; for many, it is THE creative strategy. However, due to an oversaturated marketplace of creators, audiences have become more and more savvy about some of the tricks that made content feel authentic before. It will require a lot of testing and experimentation to unlock UGC's full potential.

APP/AGENT

Chris Szymanski
Creative Director

The state of in-app ad monetization on Android

1	Rope Hero: Vice Town	Naxeex Action & RPG Games
2	Cricket - World Champions	Crazy Softech Games
3	ATV Quads Bike Stunt Racing 3D	let's play
4	City theft simulator	Naxeex Action & RPG Games
5	NovelToon: Read Novels & Books	NovelToon
6	Vegas Crime Simulator	Naxeex Action & RPG Games
7	Superhero: Battle for Justice	Naxeex Action & RPG Games
8	Rope Hero: Mafia City Wars	Naxeex Action & RPG Games
9	Simeji Japanese keyboard+Emoji	バイドゥ株式会社
10	Stone Giant	Naxeex Action & RPG Games

The top-10 apps with the biggest share of in-app ad

1202

Average number of advertisers

7797

The average number of creatives

1

The average number of network(s)

Ad formats and placements should align with the app nature, and sometimes with its genre. E.g., within games —hypercasual and casual mobile games benefit from a mix of banners, native, interstitials, and rewarded videos, strategically placed to avoid disrupting engagement. Mid-core and hard-core games lean towards rewarded or in-game ads, testing banners cautiously. Utilizing first-party data enhances ad relevance. In an ID-less and cookieless world, solutions that offer real-time delivery and privacy-first targeting become crucial.

Stafaniya Radzivonik
Director, Supply Partnerships EMEA, Smaato
(Now part of Verve Group)

VERVE GROUP

The state of in-app ad monetization on iOS

1	Hill Climb Racing 2	Fingersoft
2	Word Tile Puzzle: Tap to Crush	Hi Studio Limited
3	Hamster Maze	ZPLAY (HK) TECHNOLOGY CO., LIMITED
4	Solitaire·	Zynga Inc.
5	Match Me! 3D: 3D Match Game	Inspired Square FZE
6	1010! Block Puzzle Game	Zynga Inc.
7	What Would You Choose? Rather	DH3 Games
8	Brick Breaker: Legend Balls	Puzzle1Studio,inc.
9	Tile Craft - Triple Crush	STARSPRITE PTE. LTD.
10	Bible Trivia Quiz - Fun Game	DH3 Games

The top-10 apps with the biggest share of in-app ad

1250

Average number of advertisers

8724

The average number of creatives

2

The average number of network(s)

Apps on iOS have a more complex strategy of in-app ad monetization with more networks integrated, more advertisers bidding for the placements and more creatives running through them.

Top-ranking is covered mainly by gaming apps.

Key Takeaways

Key Takeaways

- **On iOS** there is a drop (-10%) YoY of downloads with the leaders US and China remaining the same and demonstrating a growth: US (+6,75%) and China (+2,5%). The top-15 ranking is joined by Mexico and Egypt this year, replacing Thailand and Vietnam. All top GEOs enjoy growth except Saudi Arabia and Turkey.

- **On Android** there is a drop (-2,4%) YoY of downloads with the leaders at the same positions: India (+10,4%), Brazil (+8,3%), United States (-5,1%).

- Overall, the market demonstrates **a slight decline (-3,6%) YoY of downloads**. India (+10,3%), Brazil (+8,1%), United States (-0,7%) are the top-3 markets. Russia (+11,2%), China (+10,9%), Pakistan (+12%), Germany (+6,4%), Japan (+2,7%), UK (+8%) enjoy growth while Indonesia (-2%), Mexico (-18,5%), Turkey (-4,8%), France (-1%) suffer a drop. Egypt, Argentina get into ranking in 2023, replacing Thailand and Spain. **Android covers 84% of all installs WW**.

- For both platforms combined **US, China and Japan keep the first 3 positions covering 58% of the total spend**. In total, market **lost 1% of revenue YoY**. Hong Kong, Australia, Vietnam join the top-ranking this year. South Korea enjoys the biggest growth of 22%. **iOS cover 67% of all spend**.

- As for the downloads distribution among the categories all leaders remain their positions with minor shifts. Simulation outperforms Social pushing it to the 8th position. Puzzle takes the 10th position, winning 3 ranks compared to 2022. **Gaming is the top vertical with 58,51B of downloads in total.**
  In non-gaming niche Tools (-1,47%), Photography (-3%), Shopping (-4,8%), Travel and local (-2,6%), Music and audio (-5,1%), Video players (-5%) demonstrate a decline. **Social dropped the most (-8,3%).**

- In terms of the revenue: Gaming, Entertainment and Social keep being the grossing leaders compared to 2022 despite a drop in revenue YoY.

Key Takeaways

- Taking a closer look at the **gaming on iOS**: Casual, Action and Simulation take top-3 position in an install ranking. All sub-genres suffer a **decline of downloads** YoY, in general, **losing a share of 9.75%**.

- RPG demonstrates a gradual decline in the past two years, with revenue falling by 12% of total share. However, **RPG still ranks as the top-grossing genre**. All other genres demonstrate a negative revenue trend as well. In general, **gaming lost a revenue share of 6.7% YoY**.

- **On Android**: Casual, Action and Simulation are the leaders in terms of downloads. Casual (+0,27%) outperformed Action (-4,3%) compared to 2022. Simulation (+5%), Puzzle (+5,25%), Sports(+1%), Board (+4%), Card (+4,8%) show an upward trend. Action (-4,3%), Arcade (-10%), Racing (-5%), Educational (-0,7%), Strategy (-8%), RPG (-12%), Music (-5%) experience a decline with Adventure demonstrating the biggest negative trend (-17%).

- As for the revenue, **RPG takes the first place followed by Strategy and Casual**. The ranking remains almost the same with Puzzle getting to the 4th place leaving Action behind.

- **Analyzing retention benchmarks of non-gaming apps**: The R1 leaders on Android and iOS are Dating (30,52%) and Finance (32,3%) correspondingly. Finance (9.6% Android, 12,7% iOS) has the highest R30 on both platforms.

- iOS has the higher R1 among the indicated verticals except Utilities (21,54% Android vs 21% iOS). Business (6.87%) and Utilities (5.8%) demonstrate a higher R30 on Android.

- **As for the gaming retention figures:** The R1 leaders on Android and iOS are Casual (31%) and Casino (40,6%) correspondingly. Casino (9.1% Android, 13,6% iOS) has the highest R30 on both platforms. iOS has the higher R1, R30, an average benchmark among the indicated sub-genres than Android.

- Among the indicated gaming sub-genres, **average R1 in gaming: 32,4; average R30 in gaming: 6,6.**

Key Takeaways

- The most active advertisers are coming from gaming, social and dating niches. Gaming vertical is a leader with 53% of advertisers. There is a 8,5% drop of advertisers' number YoY.
Android advertisers cover 63% of traffic.

- The most active publishers pertain to gaming vertical, joined by social, shopping. There is a 14% decline in publishers' number running ad campaigns.

- **The gaming led with more than 78,6% of advertising traffic on App Store and 52,5% on Google Play.** The biggest traffic share on both platforms together is covered by Puzzle and Casual. On Android Puzzle takes 1/4 of all ad gaming traffic.

- **Video share keeps growing both on iOS (+16%) & Android (+37%).** Interactive format shows a positive dynamics on iOS (+2,7%) and a negative one on Android (-0.5%).
Android remains the more saturated platform with creatives (71%) despite a growing share of iOS creatives (+9,2%). In general, there have been much more creatives in rotation in 2023.

- More than a half of all creatives are dropped within the first 3 days, more than 1/5 are dropped within a week. **Only 4,6%of creatives (on iOS) and 3,9% (on Android) run for more than a month.**

- **Apps on iOS have a more complex strategy of in-app ad monetization** with more networks integrated, more advertisers bidding for the placements and more creatives running through them.

Apptica

Providing the most accurate data on applications, publishers and ad creatives since 2017