



Q2 2024

—











# Digital Market Index

Discover the latest trends of the quarter across mobile apps  
and digital advertising



# Sensor Tower | Our Customers

10 out of the 10 top publishers trust Sensor Tower insights to grow their business

L'ORÉAL		Google			Disney
petco	HERSHEY	amazon	ROVIO	DOORDASH	depop
Walmart		Microsoft	SEGA	dyson	SONY
		Meta	OUTFIT7	Gett.	ByteDance
Alibaba	POPeYes	Tencent 腾讯		P&G	NBA
		Johnson & Johnson		Welch's	Revolut

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



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# Q2 2024: **Mobile Market Overview**



# About this Data:

## Mobile App Methodology

- Sensor Tower's Insights team compiled the download and consumer spend estimates provided in this report using the Sensor Tower Mobile App Insights platform.
- Figures cited in this report reflect App Store and Google Play download and consumer spend estimates for April 1, 2024 through June 30, 2024.
- Download estimates presented are on a per-user basis, meaning that only one download per Apple or Google account is counted towards the total.
- 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.
- Android app install and consumer spend estimates represent downloads and spend from the Google Play Store only. Sensor Tower does not provide download estimates for third-party Android stores.
- Consumer spend estimates are gross — inclusive of any percent taken by the app stores.



# Consumers Spent a Record \$36.2 Billion in Q2 2024 — Up Nearly 12% Year-over-Year

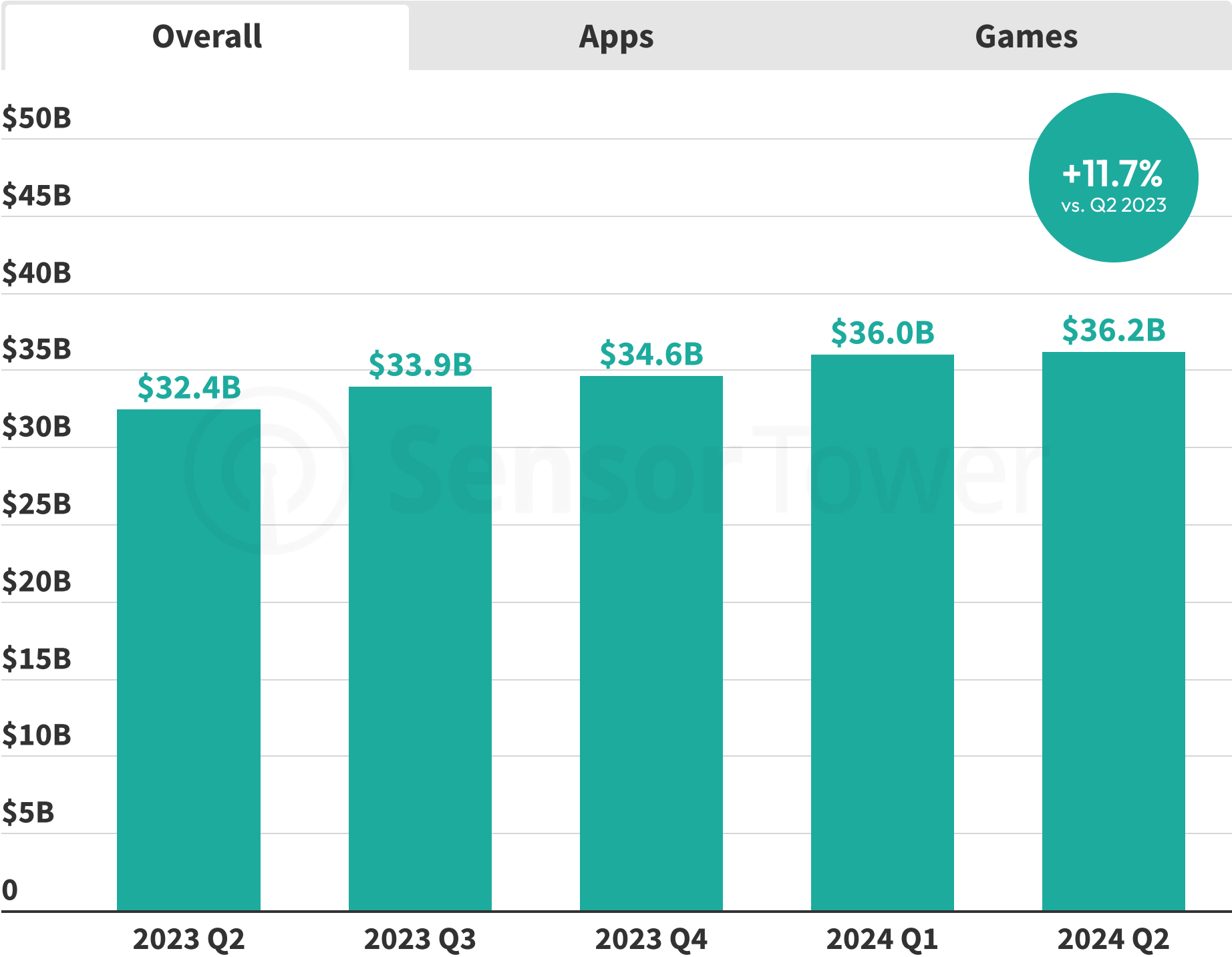
Global consumer spend across iOS and Google Play surpassed \$36 billion in Q2 2024. This was healthy growth over the past year, up 11.7% from Q2 2023 and a slight increase Q1 2024.

Apps continued to drive consumer spend growth on mobile with 22% year-over-year growth. Non-gaming is on track to soon surpass mobile games — 46% of consumer spend in Q2 2024 came from non-game apps, up from 42% a year prior.

Has mobile gaming turned a corner? Recent returns certainly suggest so, with Q2 2024 marking the fourth straight quarter of positive year-over-year growth. Expect modest positive growth to continue as the market attempts to regain the highs seen in 2021.

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

Quarterly Worldwide App Consumer Spend Between Q2 2023 - Q2 2024  
iOS and Google Play





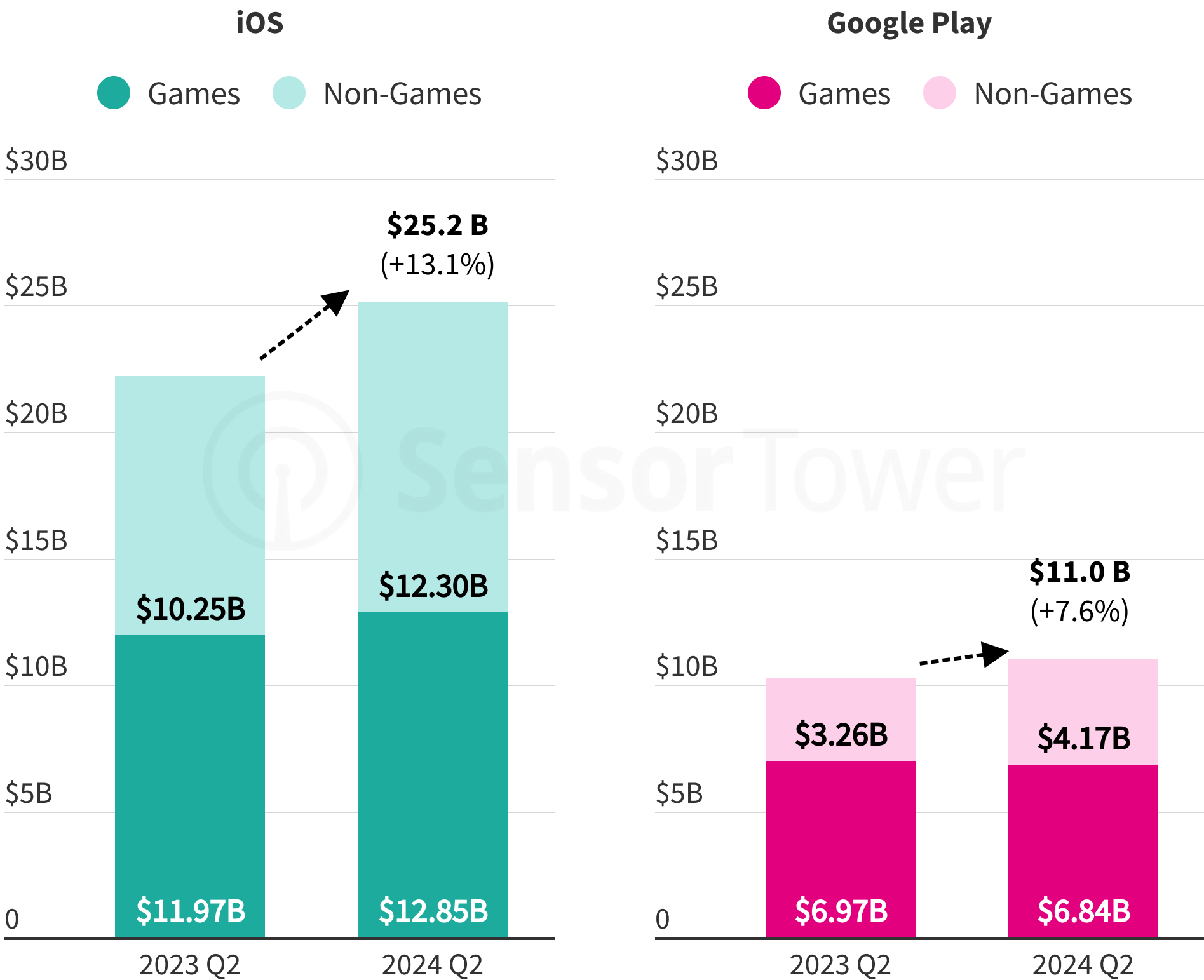
# Both iOS and Google Play See Strong Spend Growth in Q2, with iOS Holding its Lead Between the Platforms

iOS only expanded its lead over Google Play in Q2 2024 with 13% year-over-year growth to more than \$25 billion in consumer spend. However, non-games saw higher growth on Google Play (+27% vs. +19% iOS) as in-app purchases continue to monetize better on the apple platform.

Notably, consumer spend on iOS grew for mobile games in addition to apps. Game spend on iOS climbed 7% year-over-year compared to a 2% decline on Google Play.

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

Worldwide App Consumer Spend in Q2 2024





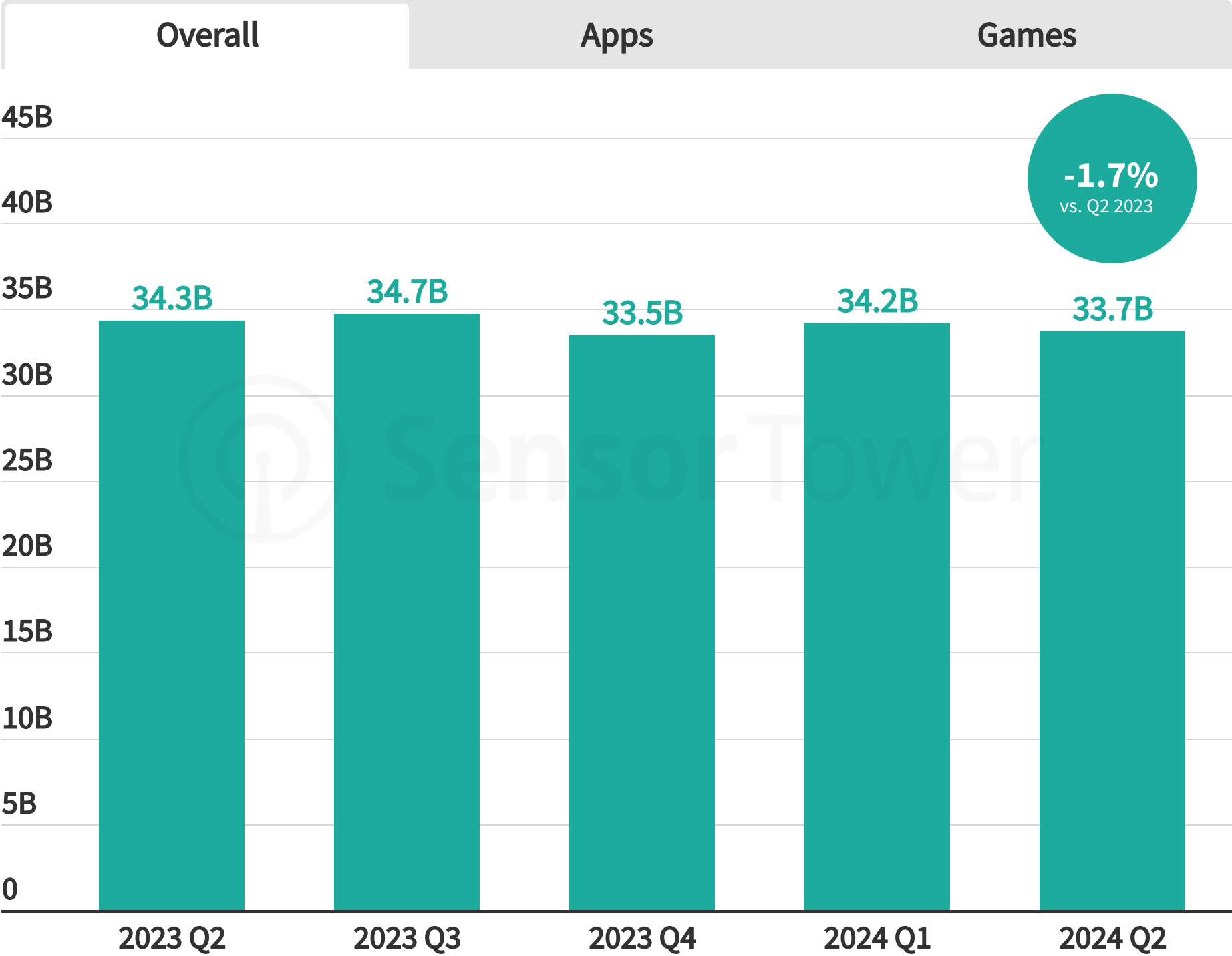
# Mobile Downloads Stabilize as Markets Like India and Brazil Mature

It's not surprising to see app downloads decline as the mobile market matures and fewer new consumers enter the market. Despite this, the battle for user attention (and spend) remains critical. For example, United States downloads have fallen to their lowest levels since 2018 while consumer spend in the market continues to rise.

Apps (excluding games) saw modest download growth globally, up 1% year-over-year. Mobile game downloads declined 6% to their lowest total since before the COVID-19 pandemic. Both have held most of the growth seen during the pandemic, with app downloads up 15% compared to Q2 2019 and game downloads up 21% over this same period.

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

Quarterly Worldwide App Downloads Between Q2 2023 - Q2 2024  
iOS and Google Play



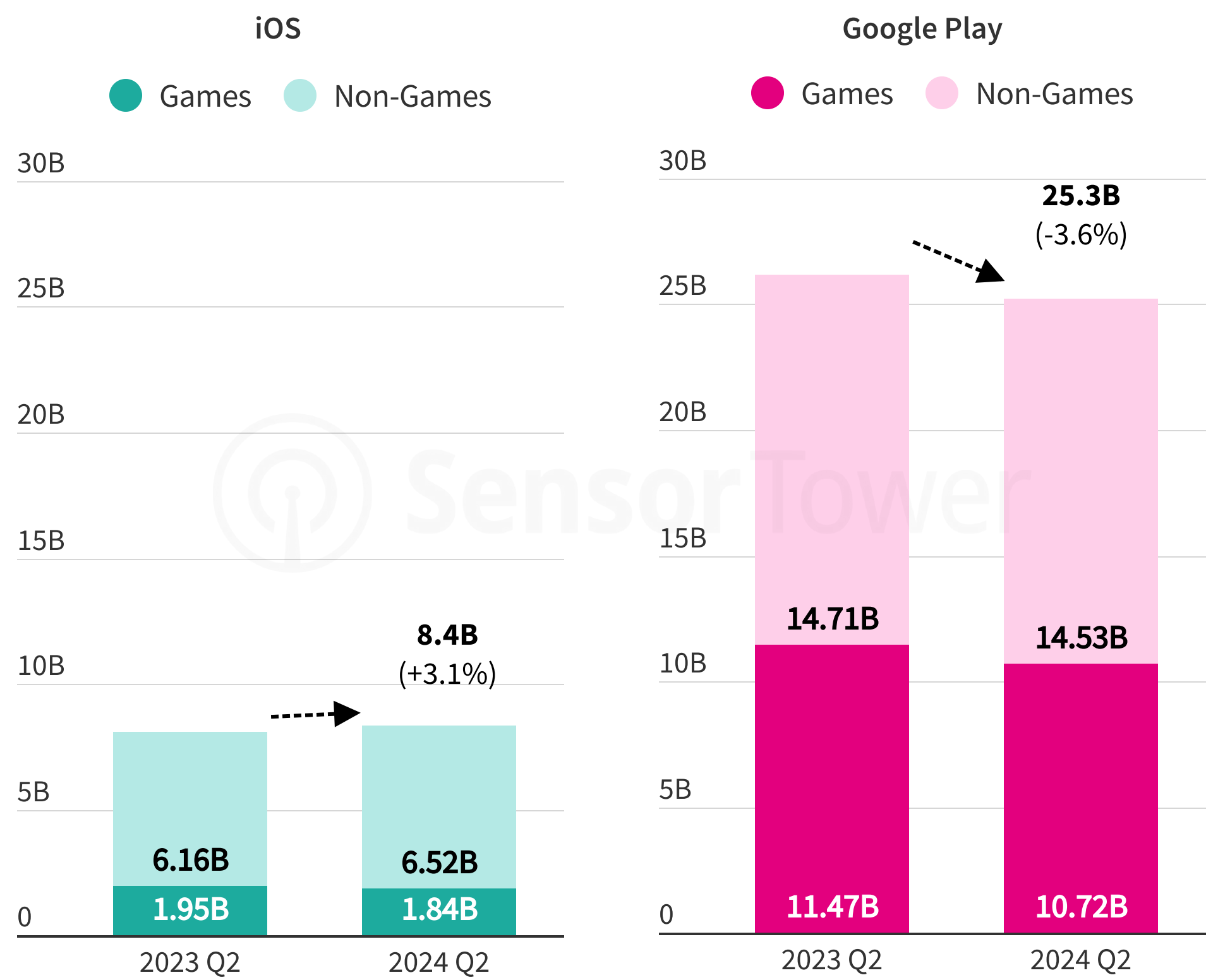
# Steady Download Growth Continues on iOS in Q2 2024 Outside of Core Markets

iOS once again has modest positive download growth in Q2 2024, up 3.1% YoY. The big three iOS markets (China, the US, and Japan) combined for 1% growth compared to more than 5% growth in the rest of the world.

Google Play, on the other hand, had yet another decline in Q2 2024 at -3.6% YoY. However, its worth noting that Google Play also saw a much larger spike in downloads during the pandemic and still account for three out of every four downloads between the two app stores.

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

Worldwide App Downloads in Q2 2024



# Q2 2024: **Top Markets**

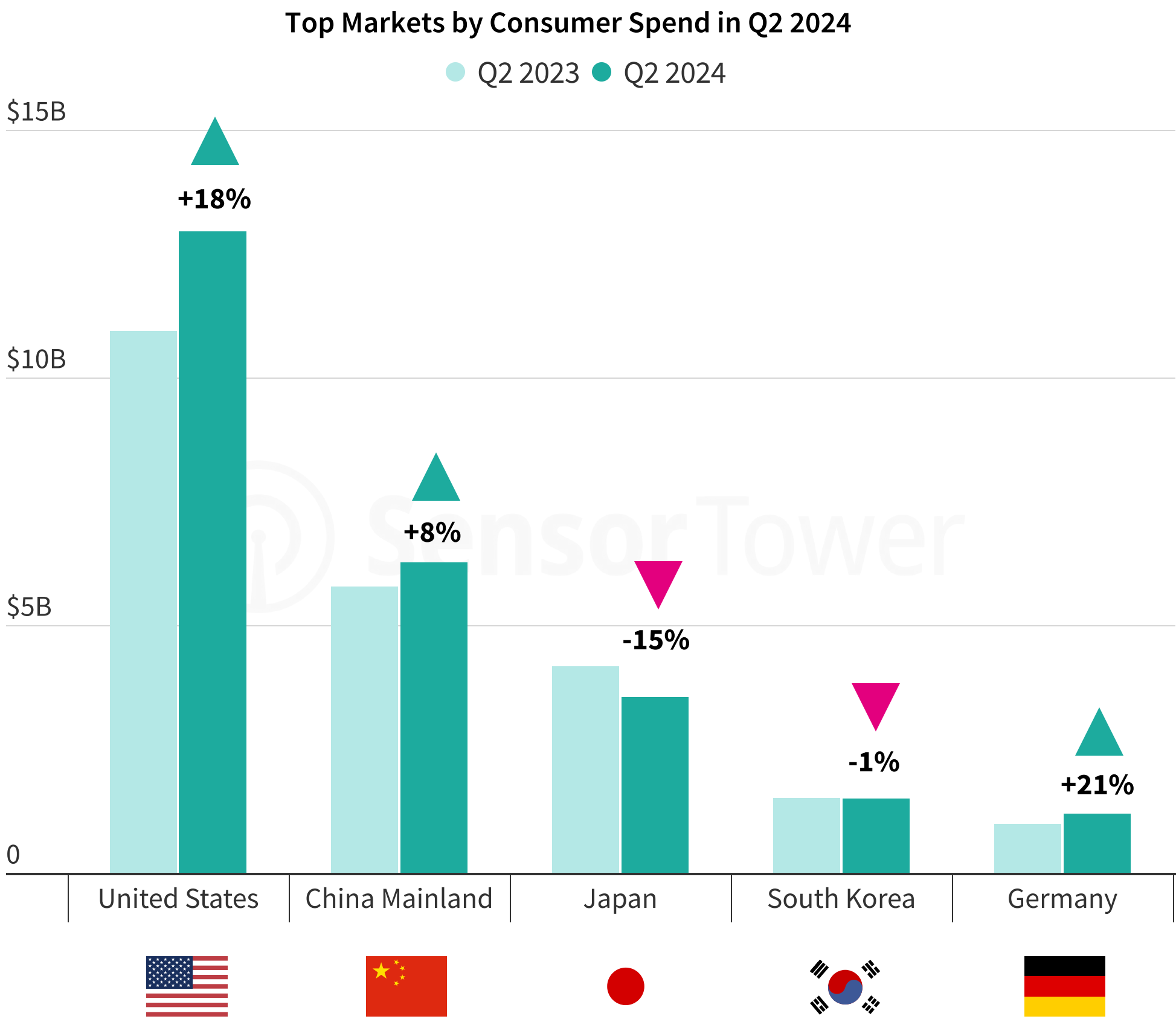


# \$36 out of Every \$100 Spent on iOS and Google Play is in the United States

The United States remains the key market for consumer spend across iOS and Google Play with nearly \$13 billion spent in Q2 2024. US market share has only climbed in recent years, from 29% in Q2 2019 to 36% in Q2 2024.

Some top markets in Asia declined in Q2 2024, with Japan experiencing a particularly large drop. South Korea's consumer spend also fell 1% YoY. China Mainland, the #2 market, bucked this trend with 8% YoY growth on iOS alone (since Google Play is not available in the market).

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



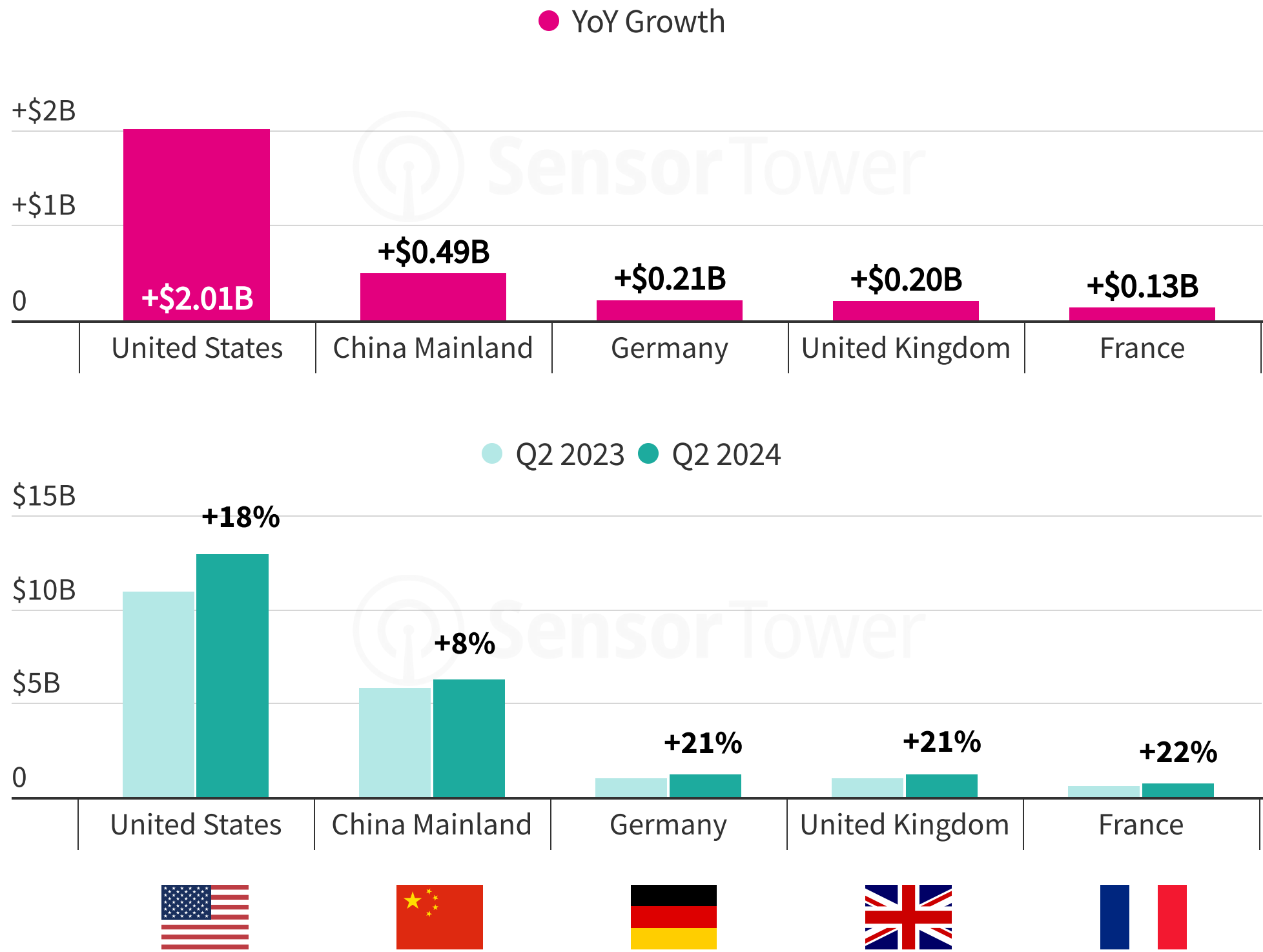
# Mobile Publishers Turn to the US and Europe for Monetization Opportunities

The United States continued to dominate consumer spend growth in Q2 2024, gaining \$2 billion in consumer spend compared to Q2 2023. This was more than the rest of the world combined, which added \$1.7 billion.

Europe accounted for three of the top five markets by consumer spend growth in Q2 2024. These countries were not atypical for the region — overall, consumer spend climbed 23% YoY in Europe.

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

Top Breakout Markets by Year-over-Year Consumer Spend Growth in Q2 2024



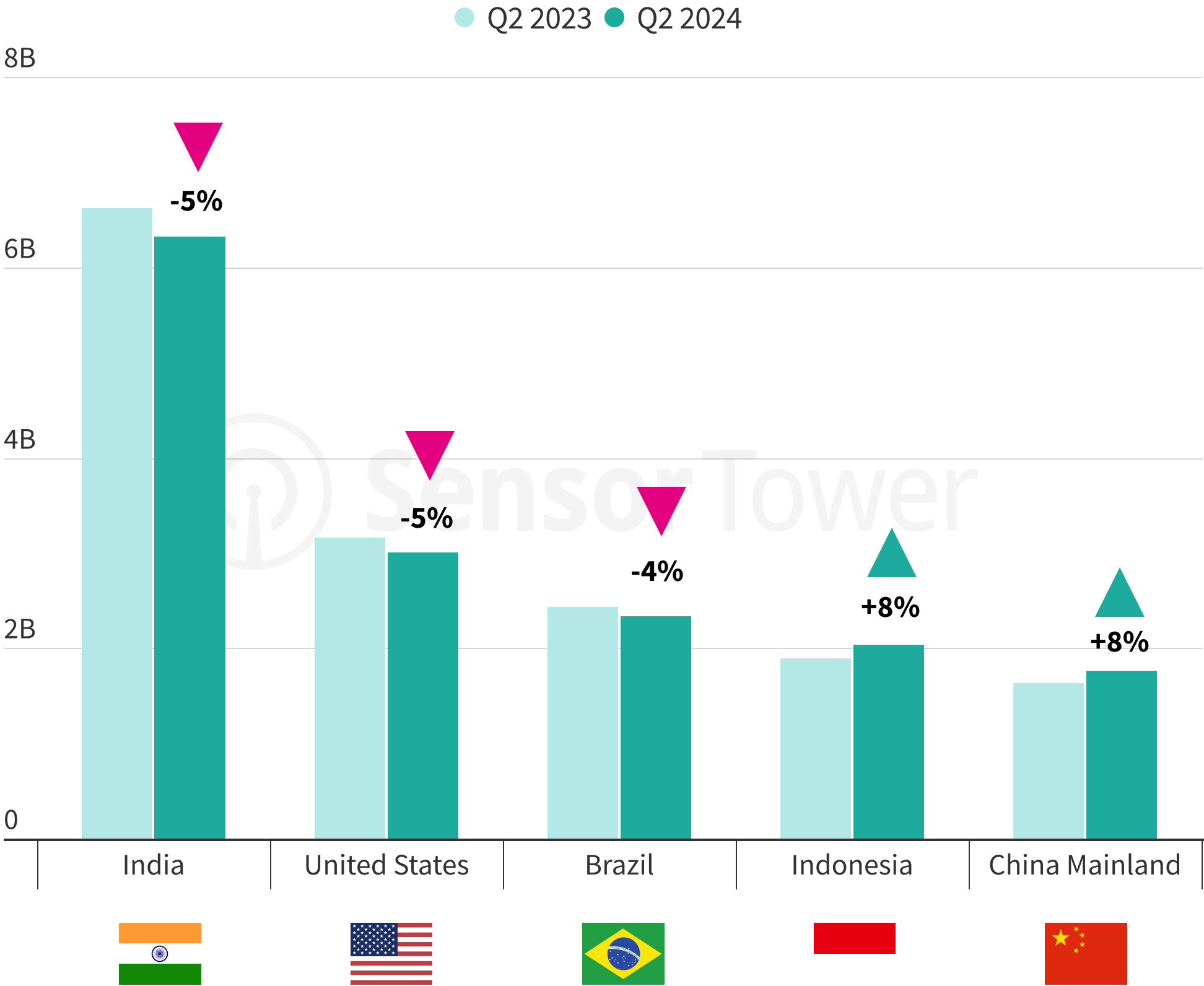
# Download Growth Stagnates in Some of the Largest Countries — Will Smaller Markets Provide Growth Opportunities?

Downloads in India declined 5% year-over-year, though they bounced back from the prior quarter after dipping below 6 billion for the first time since Q1 2020. This included nearly 20% quarter-over-quarter downloads growth for games.

The #2 and #3 markets, the US and Brazil, also saw downloads decline in Q2 2024. Overall, smaller markets didn't fair much better. Downloads for markets outside of the top five declined 2% YoY, reflecting how competitive it is for new apps in a saturated mobile space.

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

Top Markets by Downloads in Q2 2024





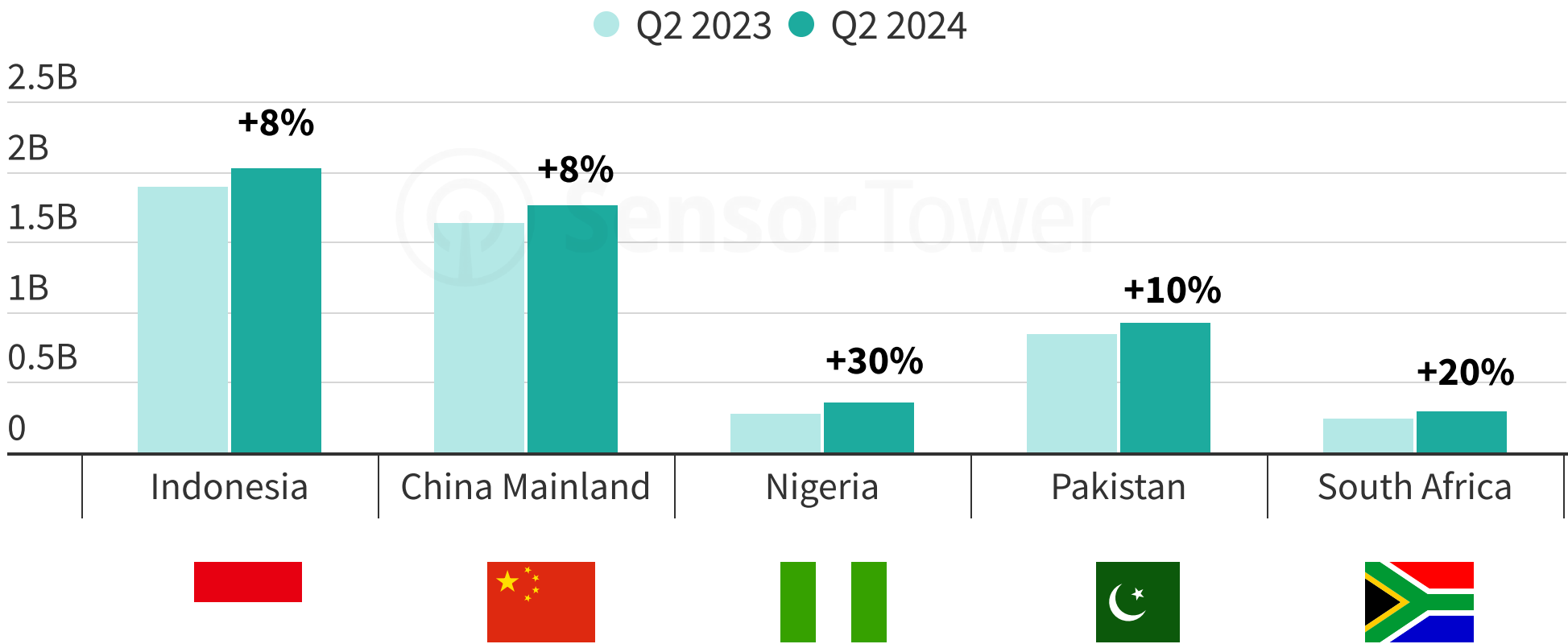
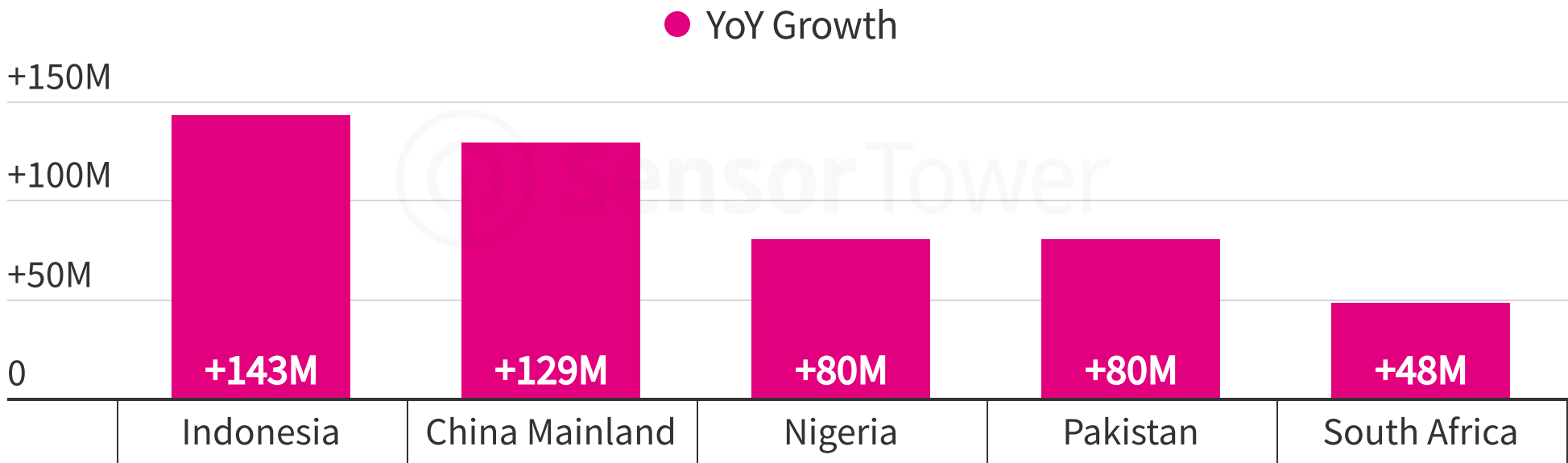
# Asia and Africa Show Potential for Download Growth

A few of the largest markets in Asia provided solid download growth, including Indonesia, China Mainland, and Pakistan. Mobile games helped provide a boost in Indonesia and Pakistan, while China Mainland's growth came from non-game categories.

Finance apps are particularly popular in Nigeria, ranking as the top category by downloads as the local currency struggles. Cryptocurrency apps provided much of the growth in Nigeria this quarter with Tonkeeper leading the way at #6 overall by downloads in Q2 2024.

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

Top Breakout Markets by Year-over-Year Download Growth in Q2 2024



# Q2 2024: **Top Categories**

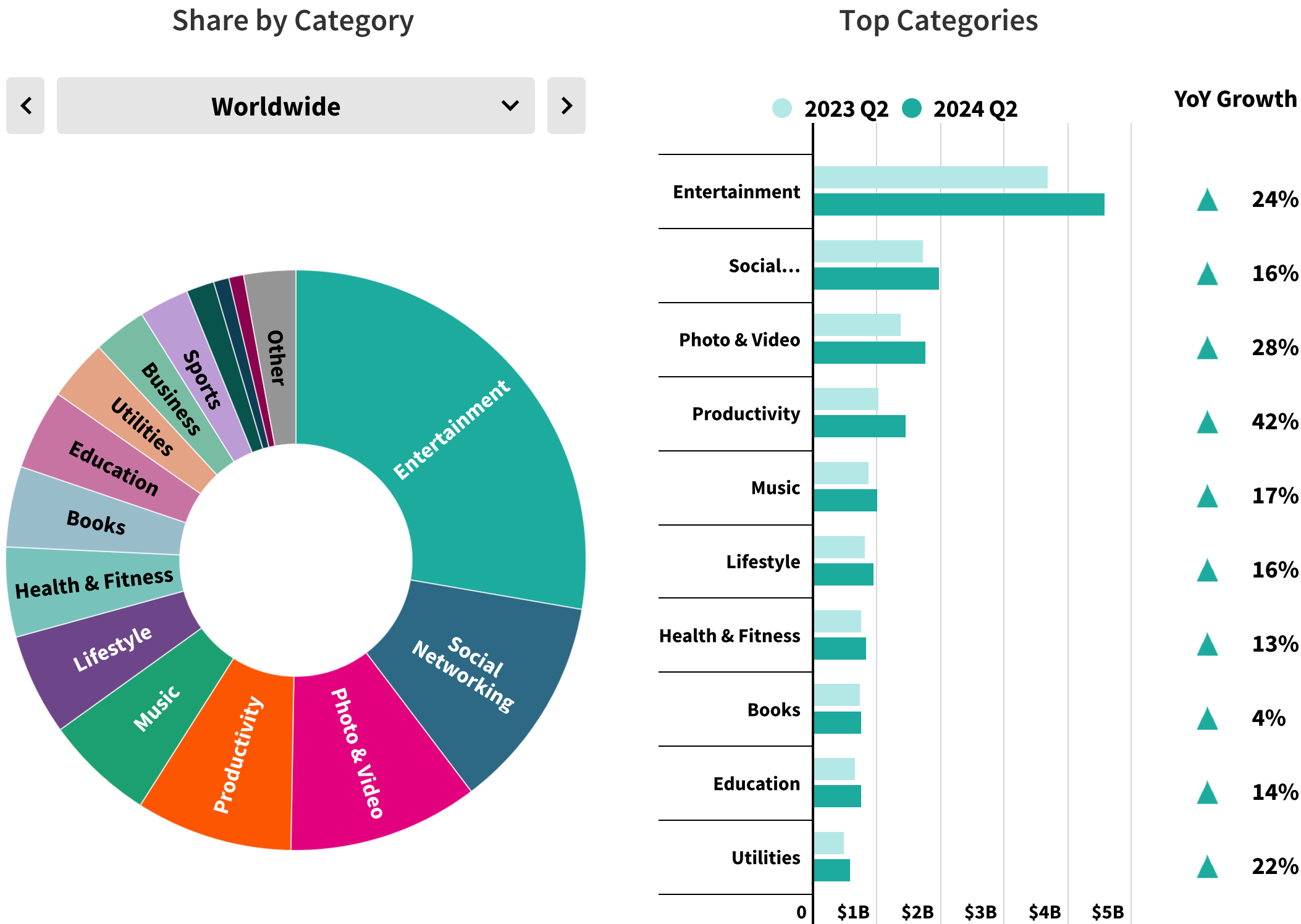
# Spend Increased Again in All Top App Categories – With Several Rising More than 20% Year-over-Year

App monetization has changed dramatically over the past decade with the rise of the subscription model. This has provided opportunities for apps beyond Entertainment, from Social Networking to Health & Fitness to Education.

Productivity, Photo & Video, Entertainment, and Utilities each saw spend grow by at least 20% year-over-year. Consumer spend in Productivity apps climbed 42%, with Google One leading the way with more than \$560 million spent in Q2 2024 (nearly 40% of the category's total). ChatGPT also continued to provide strong growth with \$86 million in consumer spend in Q2 2024, up 57% QoQ.

Source: Sensor Tower  
Note: iOS and Google Play combined. iOS only for China. Excludes third-party Android  
Categories classified by the iOS App Store and Google Play categories for each app.

Top App Categories by Consumer Spend in Q2 2024





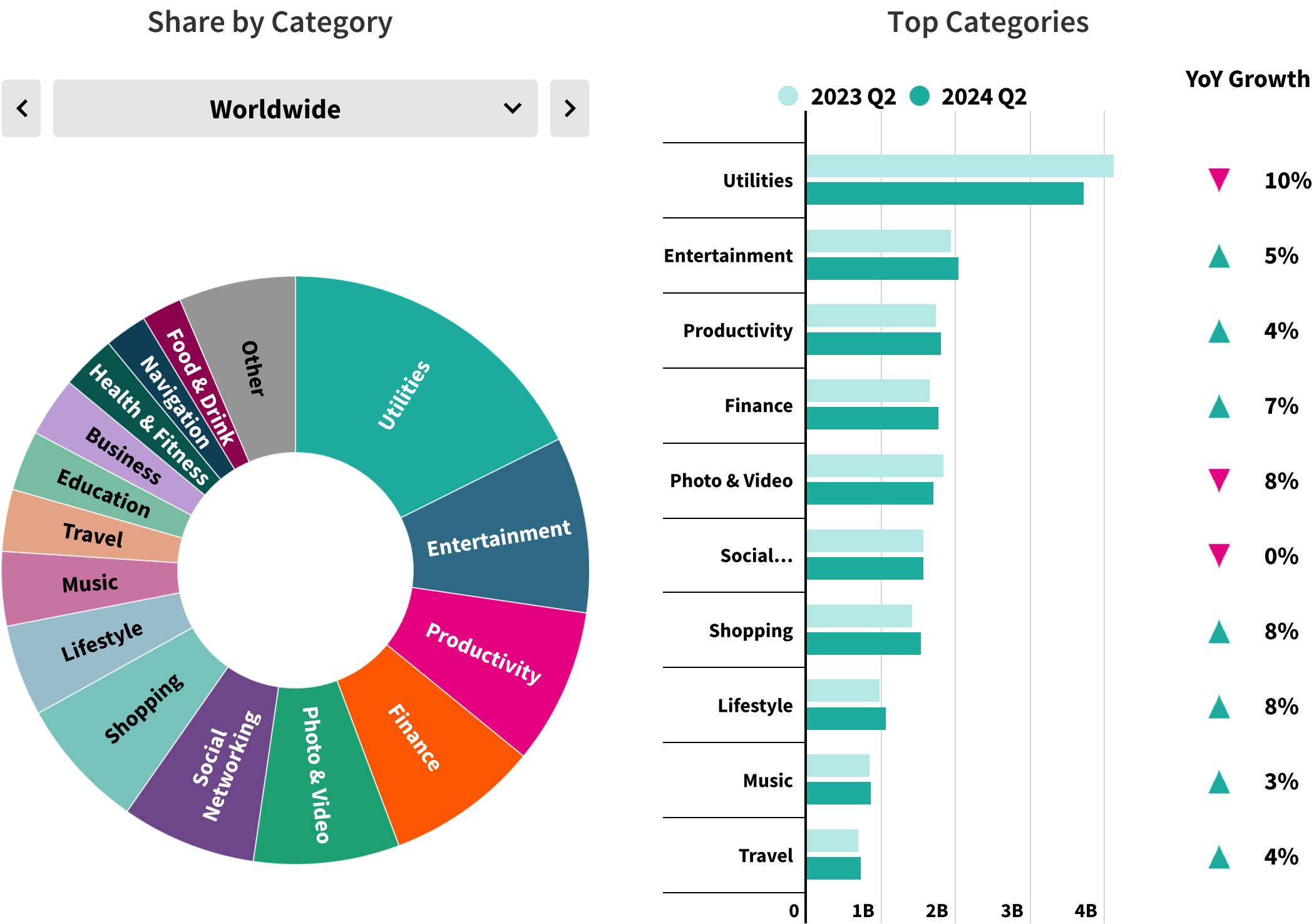
# Most App Categories Regained Positive Growth While Utilities Declines

A few categories have seen sustained download growth in recent years, reflecting the continuing transition to mobile as a replacement for in-person or online activities. Finance and Shopping were among the top categories by download growth with each at +8% YoY. The transition to mobile for finance needs, which accelerated in 2020 during the pandemic, has continued since.

Worldwide downloads for Utilities, the top app category, declined 10% year-over-year. This included a 13% drop globally on Google Play (capturing the Communication and Tools categories on the platform). On iOS, Utilities actually saw an 8% increase.

Source: Sensor Tower  
Note: iOS and Google Play combined. iOS only for China. Excludes third-party Android  
Categories classified by the iOS App Store and Google Play categories for each app.

Top App Categories by Downloads in Q2 2024



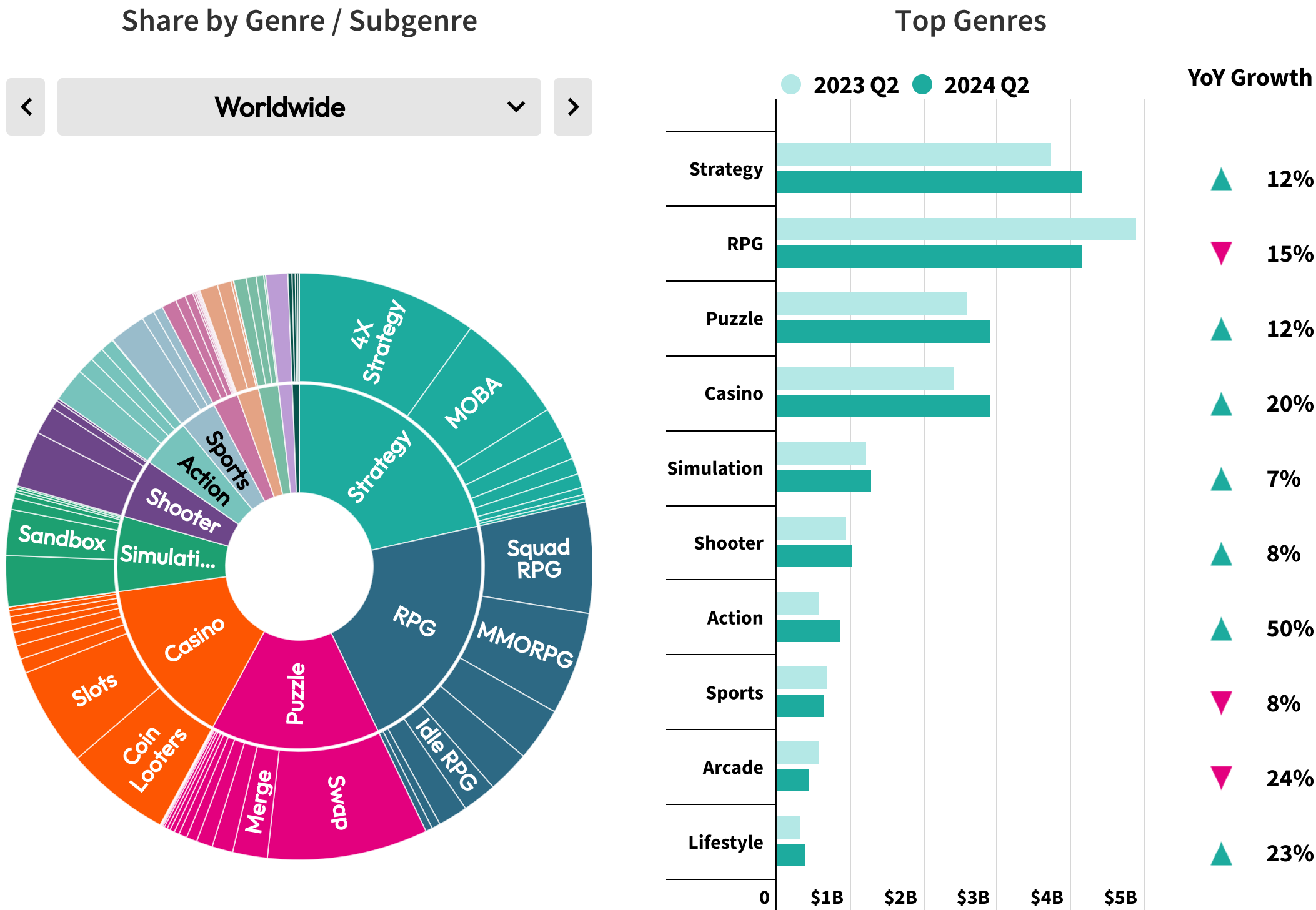
# Strategy Passes RPG to Become the Top Game Genre by Consumer Spend

For the first time since at least 2017, RPG is no longer the top mobile game genre for consumer spend. A resurgence from the Strategy genre propelled it past RPG, including strong growth in the US and South Korea. Last War, a 4X Strategy game from FirstFun, was a prime example, ranking as the #2 game by QoQ consumer spend growth in Q2 2024.

Game developers in a few top APAC markets may want to look to new genres with RPG struggling. RPG suffered from declining mobile game markets in Japan and South Korea, where the genre still accounts for nearly half of all consumer spend among games.

Source: Sensor Tower  
Note: iOS and Google Play combined. iOS only for China. Excludes third-party Android Games classified by Sensor Tower's Game Taxonomy as of July 12, 2024.

Top Game Genres by Consumer Spend in Q2 2024



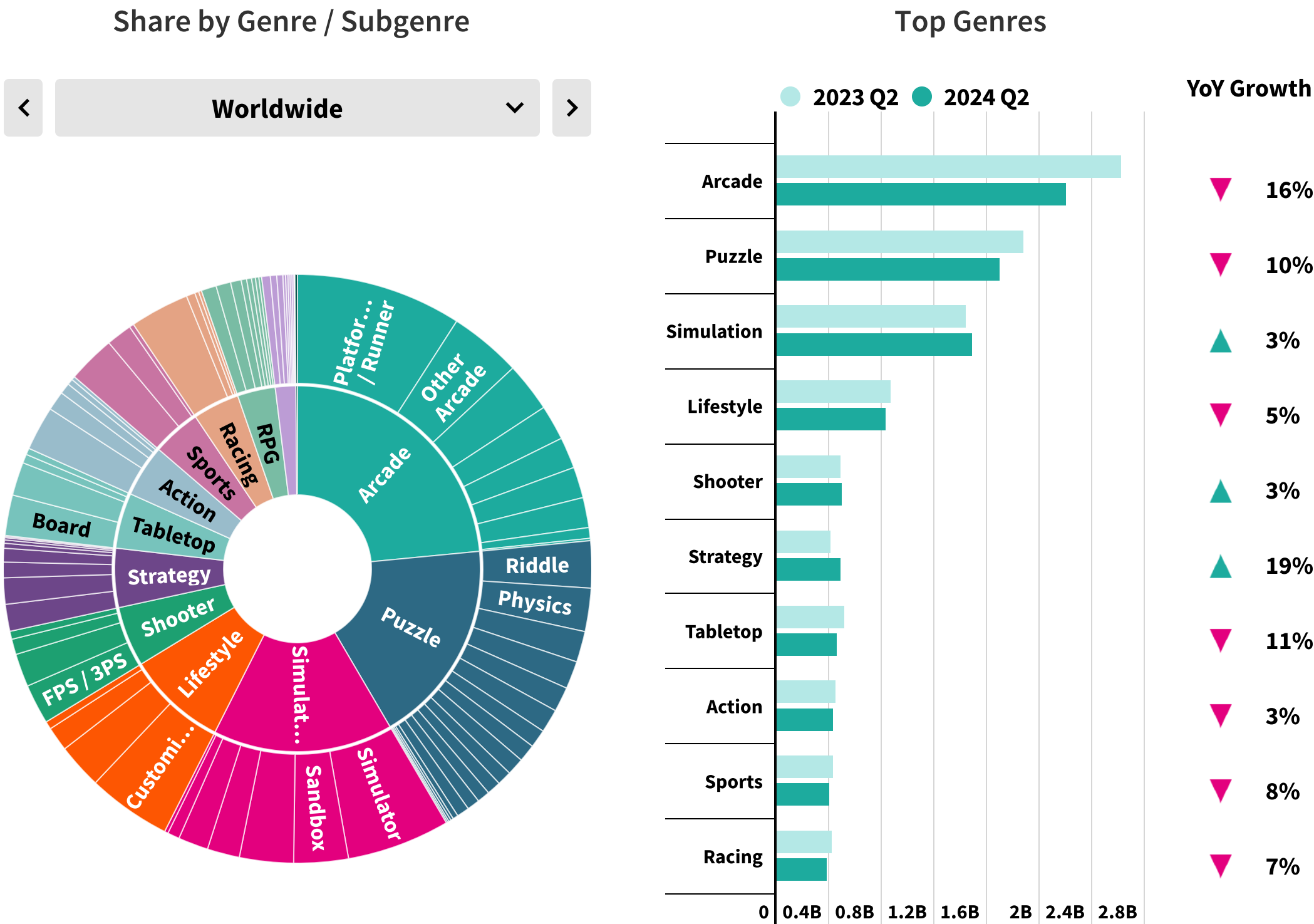
# Strategy is a Rare Opportunity for New Mobile Game Downloads

Strategy was the only mobile game genre to achieve a new high in downloads in Q2 2024 with 19% YoY growth and up 9% QoQ. More than half of the YoY growth came from Squad Busters, Supercell's latest hit launch at the end of May.

A few other game genres showed signs of life, with Simulation and Shooter each having modest YoY growth. While both of these genres were well below their peaks from Q2 2020, the fact that their downloads are leveling out is still a good sign.

Source: Sensor Tower  
Note: iOS and Google Play combined. iOS only for China. Excludes third-party Android Games classified by Sensor Tower's Game Taxonomy as of July 12, 2024.

Top Game Genres by Downloads in Q2 2024





# Q2 2024: **Top Apps**































# TikTok Breaks Consumer Spend Records in Q2 2024

TikTok again broke the record for global consumer spend in a quarter, easily surpassing \$1.3 billion in Q2 2024. The app became just the second app ever to surpass \$14 billion in all-time spend, only trailing mobile game Honor of Kings (王者荣耀). No other non-game app has even approached \$1 billion in a quarter — Google One joined TikTok and YouTube as the only apps to surpass \$500 billion in a quarter in Q2.

TikTok also regained the #1 spot in the top global downloads chart. Meta continued to dominate the top charts as well with half of the top 10 downloaded apps in Q2 2024 (Instagram, Facebook, WhatsApp Messenger, Messenger, and WhatsApp Business).

Source: Sensor Tower  
Note: iOS and Google Play combined. iOS only for China. Excludes third-party Android  
Change is vs. the previous quarter (Q1 2024).

Top Apps Across iOS and Google Play  
Q2 2024

Worldwide									
CONSUMER SPEND					DOWNLOADS				
Rank	Change	App Name	Rank	Change	App Name	Rank	Change	App Name	Rank
1	=	 TikTok	1	▲ 1	 TikTok	1	▲ 1	 TikTok	1
2	▲ 1	 Google One	2	▼ 1	 Instagram	2	▼ 1	 Instagram	2
3	▼ 1	 YouTube	3	=	 Facebook	3	=	 Facebook	3
4	=	 Disney+	4	=	 WhatsApp Messenger	4	=	 WhatsApp Messenger	4
5	=	 Tinder	5	▲ 2	 Temu	5	▲ 2	 Temu	5
6	▲ 1	 Max	6	▼ 1	 CapCut	6	▼ 1	 CapCut	6
7	▼ 1	 WeTV	7	▼ 1	 Telegram	7	▼ 1	 Telegram	7
8	=	 iQIYI	8	▲ 4	 Messenger	8	▲ 4	 Messenger	8
9	=	 LinkedIn	9	▼ 1	 Spotify	9	▼ 1	 Spotify	9
10	=	 Bumble	10	=	 WhatsApp Business	10	=	 WhatsApp Business	10



# AI Continues to Make its Mark on Mobile

AI's rising popularity on mobile revealed itself in the top breakout apps in Q2 2024. ChatGPT's rise up the consumer spend rankings continued, climbing 15 spots to rank 27th overall. Meanwhile, other AI apps like Adobe Express and Chatbot AI & Smart Assistant each reached the top 10 by worldwide download growth in Q2 2024.

Video streaming also gained popularity, with OTT apps including Max, Amazon Prime Video, Disney+ Hotstar, and JioCinema in either the breakout consumer spend or breakout downloads top chart. Short-form dramas are a more recent development, and DramaBox ranked third by consumer spend growth and just outside the top 10 by download growth.

Source: Sensor Tower  
Note: iOS and Google Play combined. iOS only for China. Excludes third-party Android  
Change is vs. the previous quarter (Q1 2024).

## Top Breakout Apps Across iOS and Google Play

Growth in Q2 2024 vs. Q1 2024

<

Worldwide

>

CONSUMER SPEND GROWTH

Breakout Rank

Spend Rank


Change

App Name

1

1

=




TikTok

2

2

▲

1




Google One

3

30

▲

34




DramaBox

4

6

▲

1




Max

5

3

▼

1




YouTube

6

53

▲

98




PictureThis

7

27

▲

15



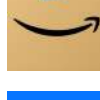
ChatGPT

8

31

▲

14



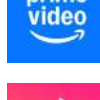
Amazon Shopping

9

18

▲

8




Amazon Prime Video

10

5

=



Tinder

DOWNLOAD GROWTH

Breakout Rank

Download Rank

Change


App Name

1

5

▲

2




Temu

2

20

▲

111




Disney+ Hotstar

3

15

▲

8




JioCinema

4

69

▲▲




Tonkeeper

5

8

▲

4




Messenger

6

77

▲▲



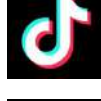
Adobe Express

7

1

▲

1




TikTok

8

6

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1




CapCut

9

7

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1




Telegram

10

127

▲▲



Chatbot AI & Smart Assistant



# Q2 2024: **Top Games**





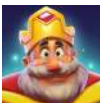






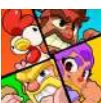




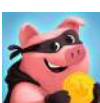


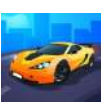
# A Few New Launches Joined Old Favorites in a Relatively Stable Market

The top five games by consumer spend in Q2 2024 were the same as last quarter. MONOPOLY GO led the way, and while its consumer spend dipped a bit from the record-setting total in Q1 2024 it was still the third best quarter for a mobile game ever.

Two big launches broke through in Q2 2024, starting with Dungeon & Fighter which launched in China on iOS in May. The game ranked #7 by consumer spend with China accounting for around 99% of the games spend (with South Korea taking the rest). Meanwhile, Supercell's Squad Busters ranked #6 by downloads after its global launch at the end of May 2024.

Source: Sensor Tower  
Note: iOS and Google Play combined. iOS only for China. Excludes third-party Android  
Change is vs. the previous quarter (Q1 2024).

## Top Games Across iOS and Google Play Q2 2024

Worldwide					
CONSUMER SPEND			DOWNLOADS		
Rank	Change	App Name	Rank	Change	App Name
1	=	 MONOPOLY GO!	1	=	 Garena Free Fire
2	=	 Honor of Kings	2	▲ 6	 Pizza Ready!
3	=	 Royal Match	3	▼ 1	 Roblox
4	=	 Roblox	4	=	 Subway Surfers
5	=	 Candy Crush Saga	5	=	 Ludo King
6	▲ 5	 Last War: Survival Game	6	NEW	 Squad Busters
7	▲ 421	 Dungeon & Fighter	7	▼ 1	 Block Blast!
8	▲ 6	 Brawl Stars	8	▲ 48	 Wood Screw Puzzle
9	▼ 3	 Coin Master	9	▲ 8	 Brawl Stars
10	▼ 3	 Game for Peace	10	▲ 2	 Race Master 3D





# A Competitive Mobile Games Market Still Provides Some Opportunities for New Entrants















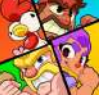
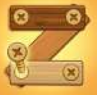




Strategy, RPG, and Action games were the leaders by consumer spend growth in Q2 2024. Despite RPG spend declining by 15% YoY globally, Wuthering Waves and AFK Journey were two new RPGs to find success.

A few common themes emerged among the breakout casual games this quarter, including supermarket simulators and screw puzzles. These games were popular in Android-led markets like India, Brazil, and Indonesia.

Source: Sensor Tower  
Note: iOS and Google Play combined. iOS only for China. Excludes third-party Android  
Change is vs. the previous quarter (Q1 2024).

## Top Breakout Games Across iOS and Google Play

Growth in Q2 2024 vs. Q1 2024

Worldwide									
CONSUMER SPEND GROWTH					DOWNLOAD GROWTH				
Breakout Rank	Spend Rank	Change	App Name		Breakout Rank	Download Rank	Change	App Name	
1	7	▲ 421		Dungeon & Fighter	1	6	NEW		Squad Busters
2	6	▲ 5		Last War: Survival Game	2	2	▲ 6		Pizza Ready!
3	8	▲ 6		Brawl Stars	3	24	NEW		Manage Supermarket Simulator
4	36	▲▲		Solo Leveling: Arise	4	37	▲▲		Supermarket Manager Simulator
5	45	NEW		Wuthering Waves	5	28	▲▲		Relax Mini Games
6	60	▲ 661		AFK Journey	6	8	▲ 48		Wood Screw Puzzle
7	63	▲ 480		Fire at Zombies	7	53	▲▲		Solo Leveling: Arise
8	89	NEW		Squad Busters	8	51	▲ 617		Screw Puzzle
9	54	▲ 95		Let's Go Muffin	9	76	NEW		Wuthering Waves
10	94	NEW		Gakuen Idolmaster	10	11	▲ 67		Dream11



# Q2 2024: **Digital Advertising Overview**



# About this Data:

## Digital Advertising Methodology

- The digital ad spending and impressions estimates presented in this report were compiled by Sensor Tower's Insights team using Pathmatics by Sensor Tower Digital Advertising Insights.
- The figures mentioned in this report reflect estimated ad investments made by advertisers from April 1, 2024 through June 30, 2024.
- Data includes select channels in each market. Figures in this report represent the totals for these channels only, not across all digital formats.
- Data Collection: Pathmatics collects a sample of digital ads from the web. In order to report the most complete picture of the digital advertising landscape, we utilize two leading data sourcing technologies: panels and data aggregators.
- Pathmatics use statistical sampling methods to estimate impressions, cost per thousand impressions (CPMs), and spend for each creative. Each impression served to our data aggregators and panelists is assigned a CPM, which when combined with impressions results in our spend estimates.
- Pathmatics OTT data is powered by a panel of real OTT & CTV viewers and includes data representative of all Smart TV brands, such as Hulu, Netflix, Pluto TV, Tubi, Peacock, and Paramount+.





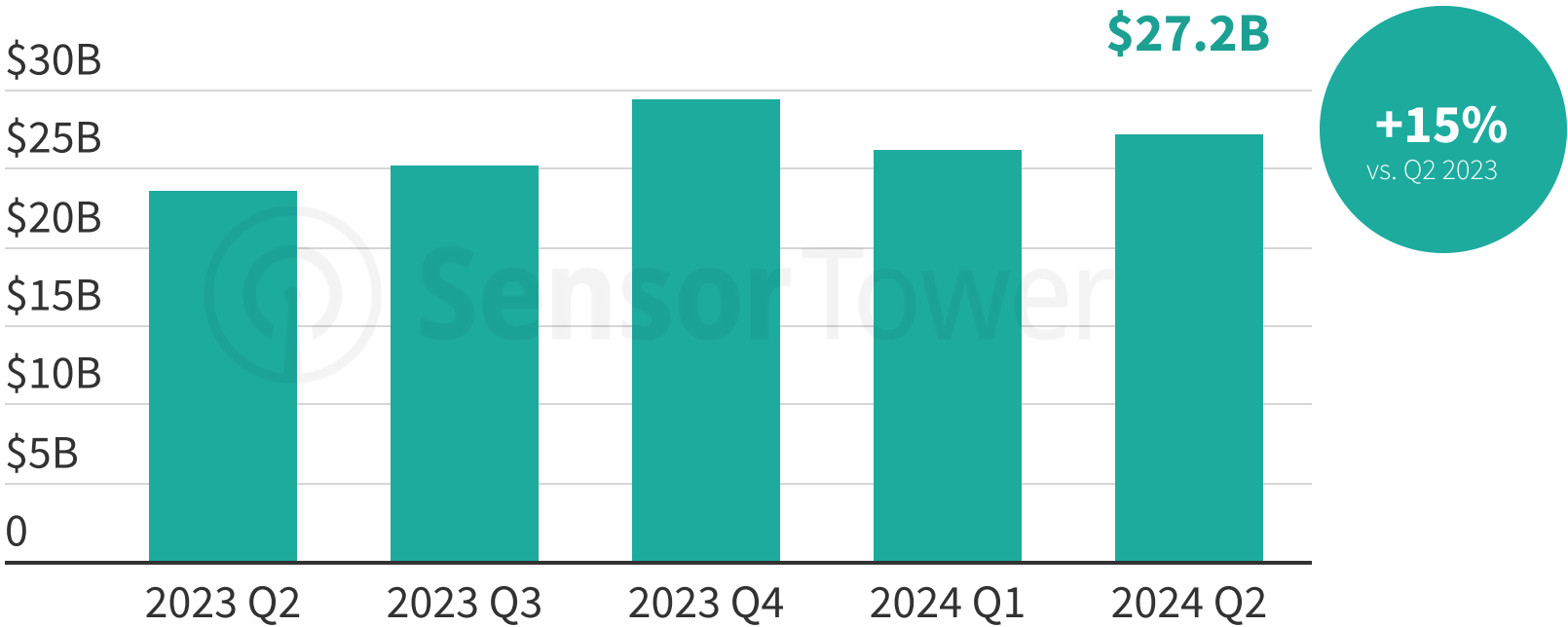
# United States Digital Ad Spend Surpasses \$27 Billion in Q2 2024, Up 15% Year-over-Year

US digital ad spend across mobile, desktop, and OTT surpassed \$27 billion in Q2 2024 with 3.3 trillion impressions.

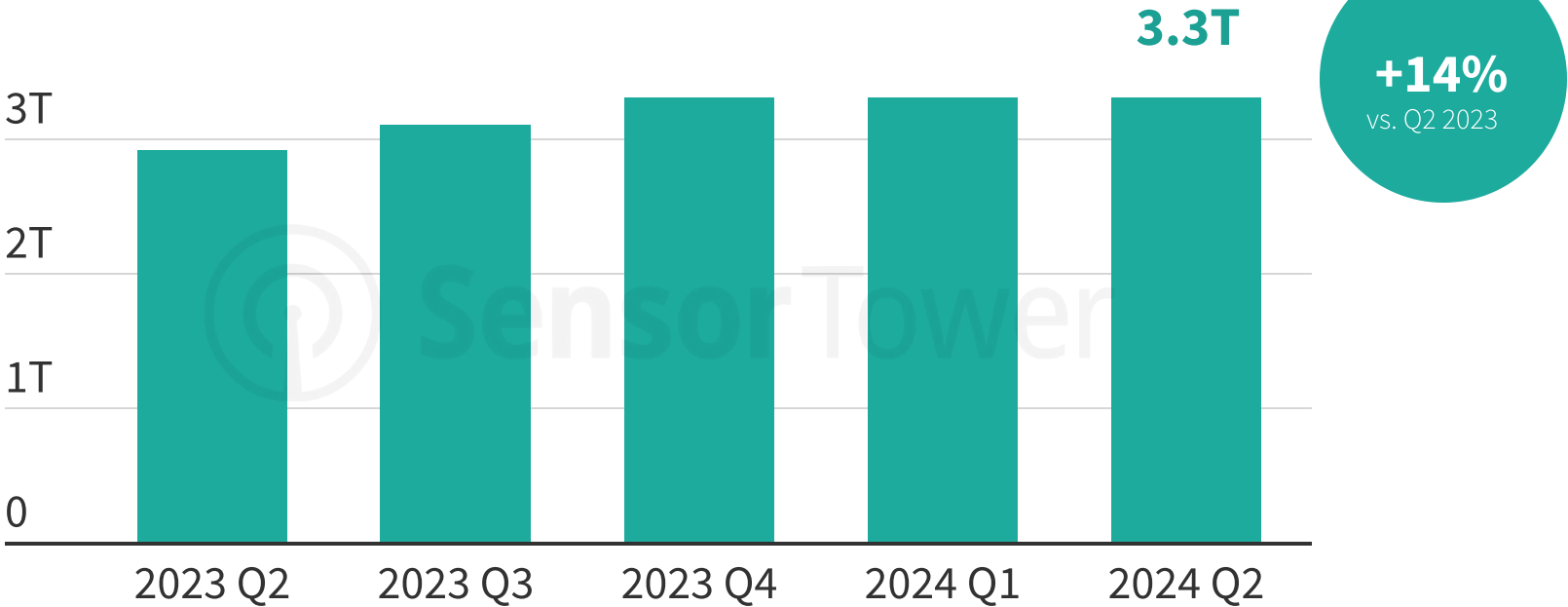
Other markets also had healthy growth for digital ad spend, with double-digit growth across the board. Australia led the way at 21% year-over-year growth, with Italy and New Zealand close behind at 19% YoY growth. Note that the included ad channels vary by market.

Source: Sensor Tower  
Note: Includes a selection of advertising channels. Ad spend estimates as of July 8, 2024.  
Available ad channels vary by market. See [Appendix \(page 42\)](#) for list of ad channels included in each market.

Digital Ad Spend by Country



Digital Ad Impressions by Country



Included Ad Channels

Only select ad channels are available in each market

Ad Channel	Included?
Facebook	✓
Instagram	✓
Snapchat	✓
TikTok	✓
X	✓
YouTube	✓
Desktop Display	✓
Mobile Display	✓
OTT	✓
Desktop Video	✓



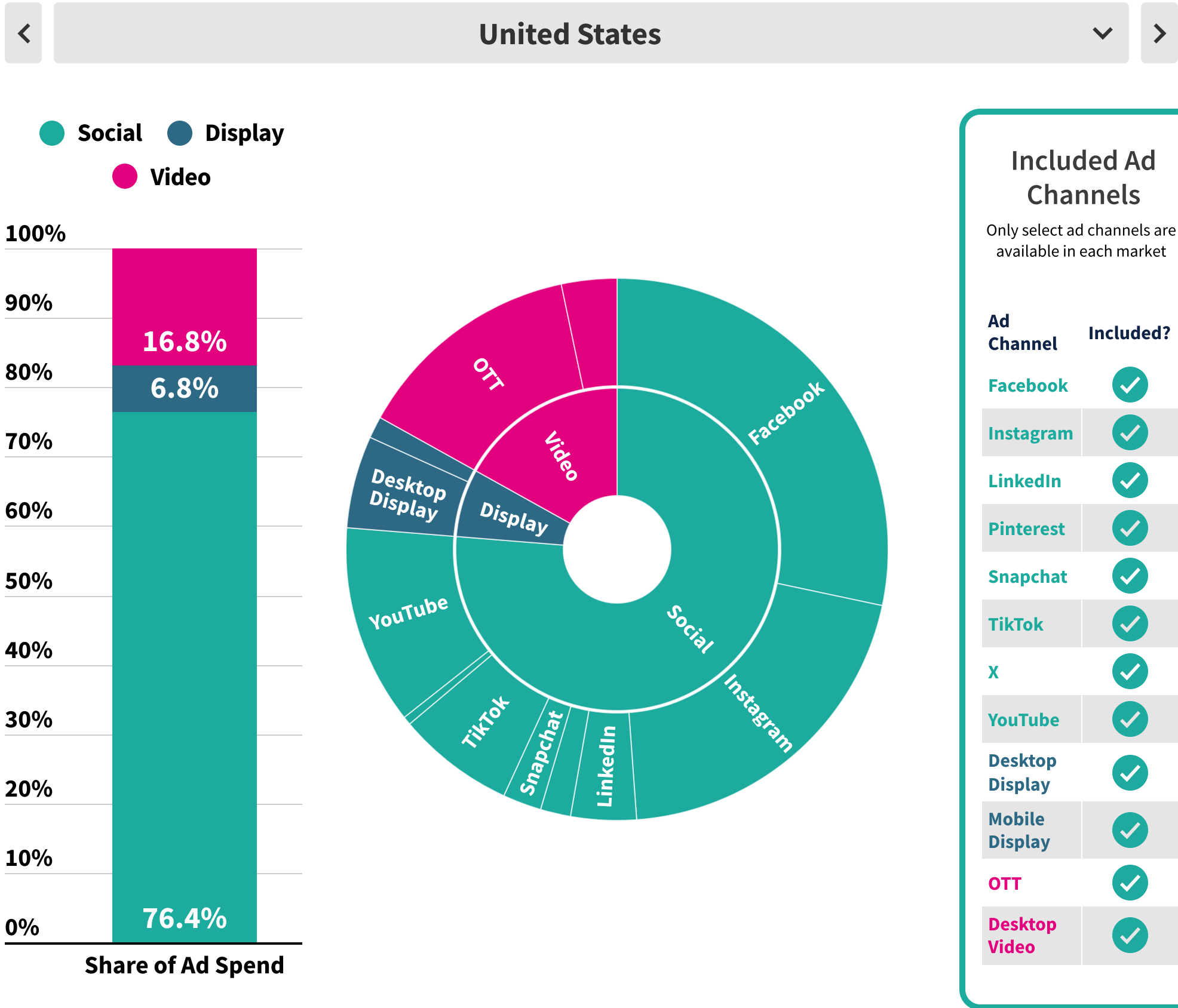
# Social Ad Channels Account for More than \$3 of Every \$4 Spent in the United States

Among included digital ad channels in the US, social networks like Facebook, Instagram and TikTok accounted for more than 76% digital ad spend in Q2 2024, up slightly from the previous quarter. Facebook and Instagram combined for nearly 50% of US ad spend. Video was next behind social at nearly 17%, largely driven by OTT.

LinkedIn and Pinterest are the latest two ad channels added to Sensor Tower's coverage in the United States. These channels combined for nearly 6% of US ad spend, with LinkedIn ranking ahead of Snapchat and both outpacing X.

Source: Sensor Tower  
Note: Includes a selection of advertising channels. Ad spend estimates as of July 8, 2024.  
Available ad channels vary by market. See [Appendix \(page 42\)](#) for list of ad channels included in each market.

Share of Digital Ad Spend by Channel in Q2 2024





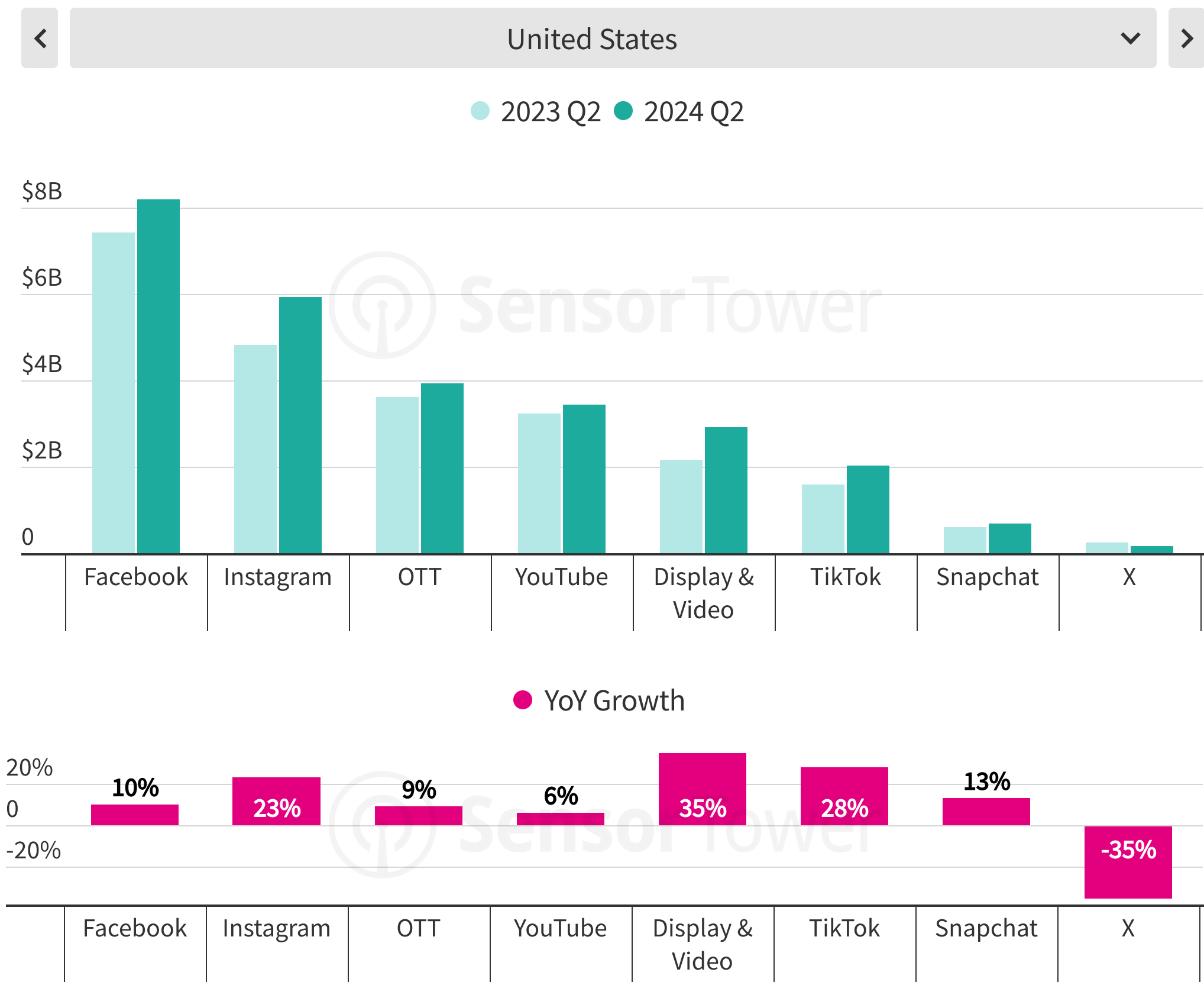
# US Digital Ad Spend on TikTok Climbs 28% Though it Still Trails Meta's Top Social Apps

Meta's Facebook and Instagram held their spots as the top two digital ad channels in the US. Meanwhile, TikTok had the highest year-over-year growth among the social ad channels at 28%.

Display & Video ad spend grew 35% vs. a year prior, largely driven by Desktop Video ads. OTT was also a popular ad channel in the United States though its growth trailed that of most social channels.

Source: Sensor Tower  
Note: Includes a selection of advertising channels. Ad spend estimates as of July 8, 2024.  
Available ad channels vary by market. See [Appendix \(page 42\)](#) for list of ad channels included in each market.

Year-over-Year Digital Ad Spend Growth by Channel in Q2 2024

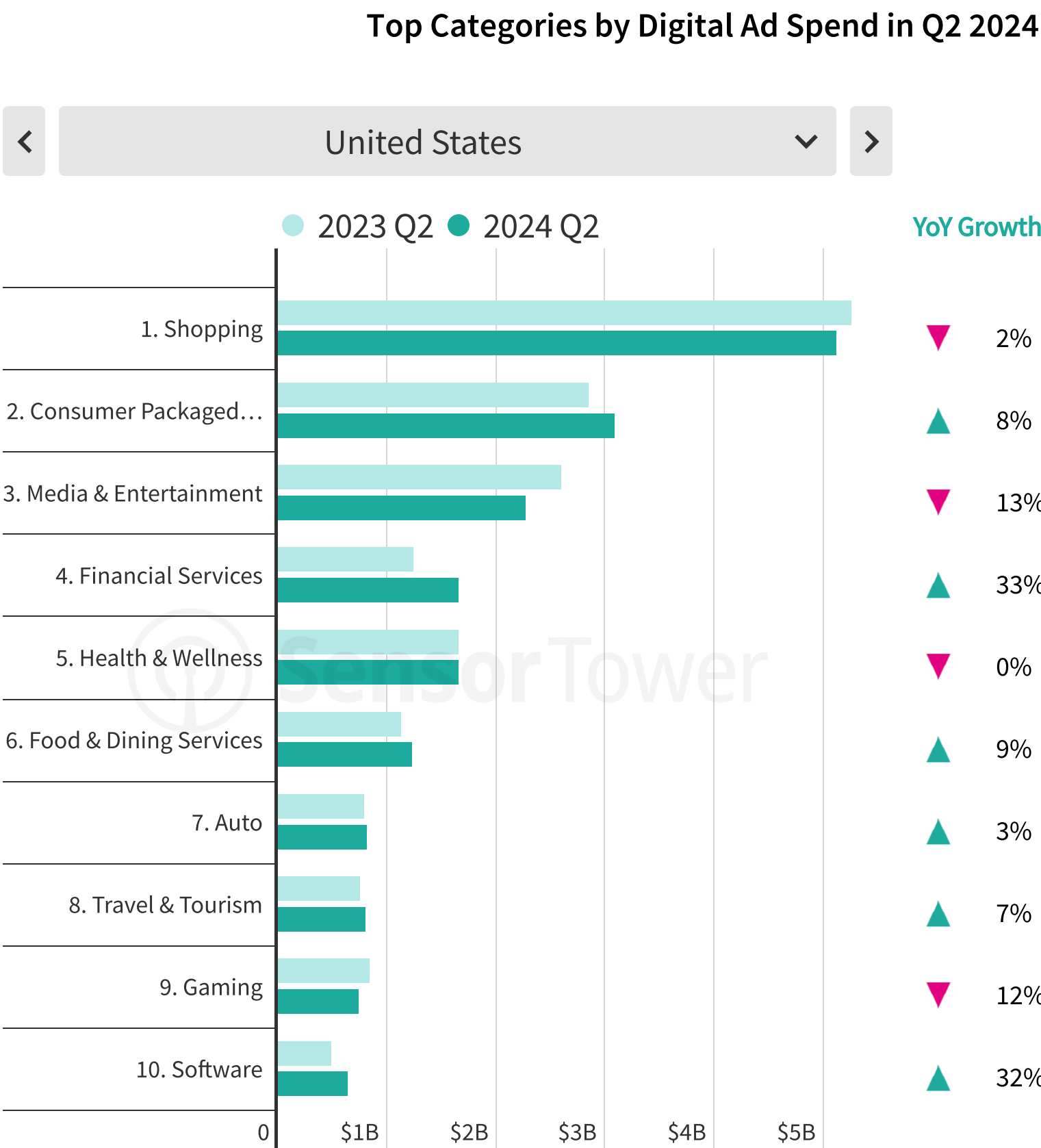


# US Ad Spend for Shopping Has Leveled Out — Which Categories are Providing Growth in Q2 2024

Shopping remained the top category by United States digital ad spend at more than \$5 billion. While this was down slightly year-over-year, it'll be interesting to watch how much ad spend accelerates during the holiday shopping season at the end of the year.

Financial Services and Software were the fastest growing categories by US digital ad spend. Insurance companies like Liberty Mutual and Progressive helped propel the Financial Services category with nearly 50% YoY growth. Meanwhile, Adobe Creative Cloud, Shopify, and Grammarly were the top Software advertisers in Q2 2024.

Source: Sensor Tower  
Note: Includes a selection of advertising channels. Ad spend estimates and categories as of July 8, 2024. Available ad channels vary by market. See [Appendix \(page 42\)](#) for list of ad channels included in each market.



#### Included Ad Channels

Only select ad channels are available in each market

Ad Channel	Included?
Facebook	✓
Instagram	✓
Snapchat	✓
TikTok	✓
X	✓
YouTube	✓
Desktop Display	✓
Mobile Display	✓
OTT	✓
Desktop Video	✓



# Five Advertisers Jump into the Top 10 by US Digital Ad Spend in Q2 2024

Procter & Gamble and Amazon.com held their spots as the top US advertisers by digital ad spend, while Expedia moved up one spot to rank third. How did these advertisers adjust their strategies this quarter? Procter & Gamble spent more on Pampers ads (only ranking behind how much it spent on Native Deodorant and Old Spice ads), while Expedia spent more on its Expedia brand rather than VRBO, its vacation rental brand.

Kenvue led the way in terms of advertisers breaking into the top 10 this quarter. It primarily focused on skincare products from Neutrogena and Aveeno and medication like Tylenol and Benadryl.

Source: Sensor Tower  
Note: Includes a selection of advertising channels. Ad spend estimates as of July 8, 2024.  
Available ad channels vary by market. See [Appendix \(page 42\)](#) for list of ad channels included in each market.

Top Advertisers by Digital Ad Spend in Q2 2024

<

United States

>

Rank	Advertiser	Change vs. Q1 2024
1	Procter & Gamble	=
2	Amazon.com	=
3	Expedia, Inc.	▲ 1
4	Kenvue Inc. - (ケンビュウ)	▲ 12
5	Temu (Whaleco Inc.)	=
6	PepsiCo, Inc.	▲ 8
7	The Hershey Company	▲ 3
8	L'Oreal	▲ 4
9	Progressive Casualty Insurance Company	▲ 9
10	Walmart Inc.	▲ 5

Included Ad Channels

Only select ad channels are available in each market

Ad Channel	Included?
Facebook	✓
Instagram	✓
Snapchat	✓
TikTok	✓
X	✓
YouTube	✓
Desktop Display	✓
Mobile Display	✓
OTT	✓
Desktop Video	✓



# Tencent-Owned Supercell Rolled Out a Huge Campaign for Squad Busters, its New Mobile Game

Tencent, ranking outside the top 100 advertisers by US digital ad spend in Q1 2024, moved all the way up to 15th in Q2 2024. This was the result of a massive ad campaign for the launch of Squad Busters. More than 70% of the ad spend for Squad Busters was on YouTube, with other social channels like Instagram, TikTok, and Snapchat accounting for the rest. Interestingly, Supercell also invested significantly more in advertising for another of its mobile games, Brawl Stars, in Q2 2024.

As the weather heats up, so does soda company advertising. The Coca-Cola Company ranked #3 by QoQ increase in digital ad spend in the US, and PepsiCo reached the top 10 by both overall spend and QoQ growth. Gatorade was PepsiCo's top brand by digital ad spend in Q2 2024, while Coke was the top brand for The Coca-Cola Company.

Source: Sensor Tower  
Note: Includes a selection of advertising channels. Ad spend estimates as of July 8, 2024.  
Available ad channels vary by market. See [Appendix \(page 42\)](#) for list of ad channels included in each market.

Top Breakout Advertisers by Digital Ad Spend Growth in Q2 2024 vs. Q1 2024

United States			
Breakout Rank	Advertiser	Spend Rank in Q2 2024	Change vs. Q1 2024
1	Tencent	15	▲ 91
2	Kenvue Inc. - (ケンビュウ)	4	▲ 12
3	The Coca-Cola Company	22	▲ 53
4	Amazon.com	2	=
5	Google	23	▲ 36
6	Molson Coors Beverage Company	53	▲▲
7	Purina PetCare (Nestle)	26	▲ 37
8	Home Depot	31	▲ 51
9	SC Johnson & Son, Inc	36	▲ 71
10	PepsiCo, Inc.	6	▲ 8

### Included Ad Channels

Only select ad channels are available in each market

Ad Channel	Included?
Facebook	✓
Instagram	✓
Snapchat	✓
TikTok	✓
X	✓
YouTube	✓
Desktop Display	✓
Mobile Display	✓
OTT	✓
Desktop Video	✓



# Q2 2024: **Retail Media Advertising Overview**






# What is Retail Media Intelligence?


Pathmatics by Sensor Tower's Retail Media Insights provides marketers with complete visibility into the co-branded digital advertising ecosystem and retail media networks. Your customized marketing insights reports empower you with a view into spend, media mix, impressions and share of voice for display, video, mobile, OTT and paid social across your selected retail partners and competitors.


- Benchmark yourself against your competitors' co-branded campaigns to understand seasonality and trends
- Uncover retailer media network and competitor media mix & marketing strategy

[Learn More & Request a Demo Here](#)

**Retailer: Walmart**

**Walmart**  
This is not a drill—these Rollbacks are real & going fast. Shop them now 

  
Fujifilm Instax Mini 12 Instant Film Camera | Clay White [Shop Now](#)


**Advertiser: Fujifilm** 


**Retailer: Chewy**


**Chewy**  
Keep your indoor and outdoor cats protected from fleas and ticks - plus get 20% off your 1st Chewy Pharmacy order.


  
Chewy [Shop Now](#)

**Advertiser: Zoetis** 

**Retailer: Best Buy**

**Best Buy**  
Premium performance and incredible battery life. An AMD Ryzen 8040 Series processor with Windows 11 is a game changer.

  
HP - Envy 2-in-1 15.6" Full HD Touch-Screen Laptop - AMD Ryzen 7 7730U - 16GB Memory - 512GB SSD - Nightfall Black \$1,049.99 [Shop Now](#)

**Advertiser: Hewlett-Packard (HP)** 

**Retailer: Home Depot**

**GET TO-DO LISTS DONE WITH ECOLAB**   
[Shop Now](#)

**Advertiser: Ecolab** 



# Walmart, Target, and Home Depot are the United States Retail Media Leaders in Q2 2024

Walmart Inc. ran away from the competition when it came to retail media impressions in the US. Its 11.7 billion impressions was more than twice as many as the #2 retailer, Target. Home Depot moved up a spot to rank third this quarter.

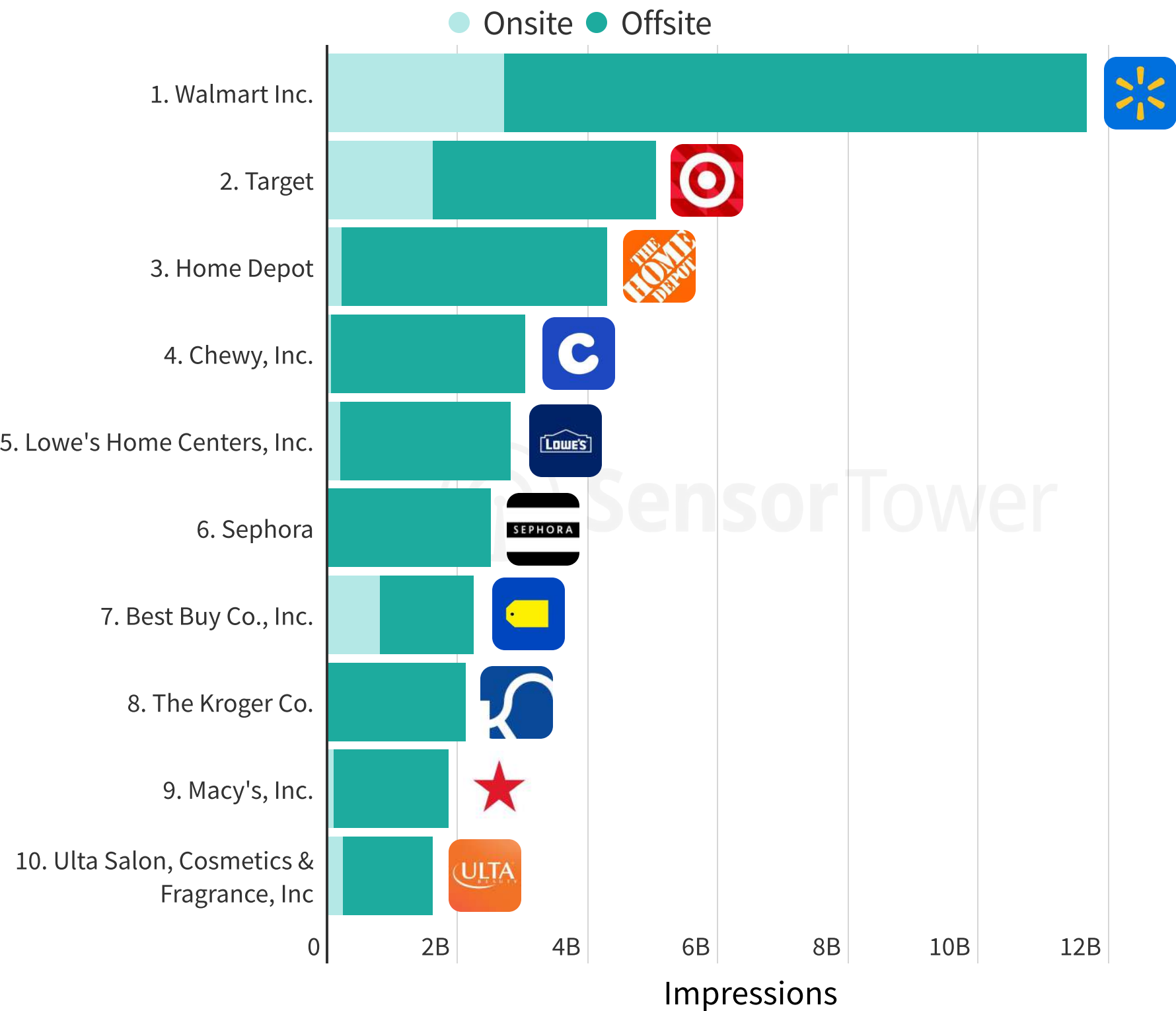
**Definitions:**

**Onsite:** Ads displayed on the retailer's website (for example, ads displayed on Walmart.com). Note that this includes onsite display only, not inclusive of search, sponsored results, or proprietary ad units per retailer

**Offsite:** Ads displayed on other websites, social media platforms, or OTT. For example, this includes co-branded advertisements on Facebook, TikTok, and YouTube.

Source: Sensor Tower  
Note: Includes a selection of top US retailers. Data for June 2024 include select devices / channels and exclude Facebook and Instagram.

Top Retail Media Retailers by Impressions in the United States in Q2 2024



# Home & Garden Shopping Advertising Heats Up in the Warmer Months

Personal Care was the top category by retail media impressions in the US in Q2 2024. The category is quite popular for a variety of retailers including Ulta and Sephora, as well as some general retailers like Target, Walmart, and Macy's.

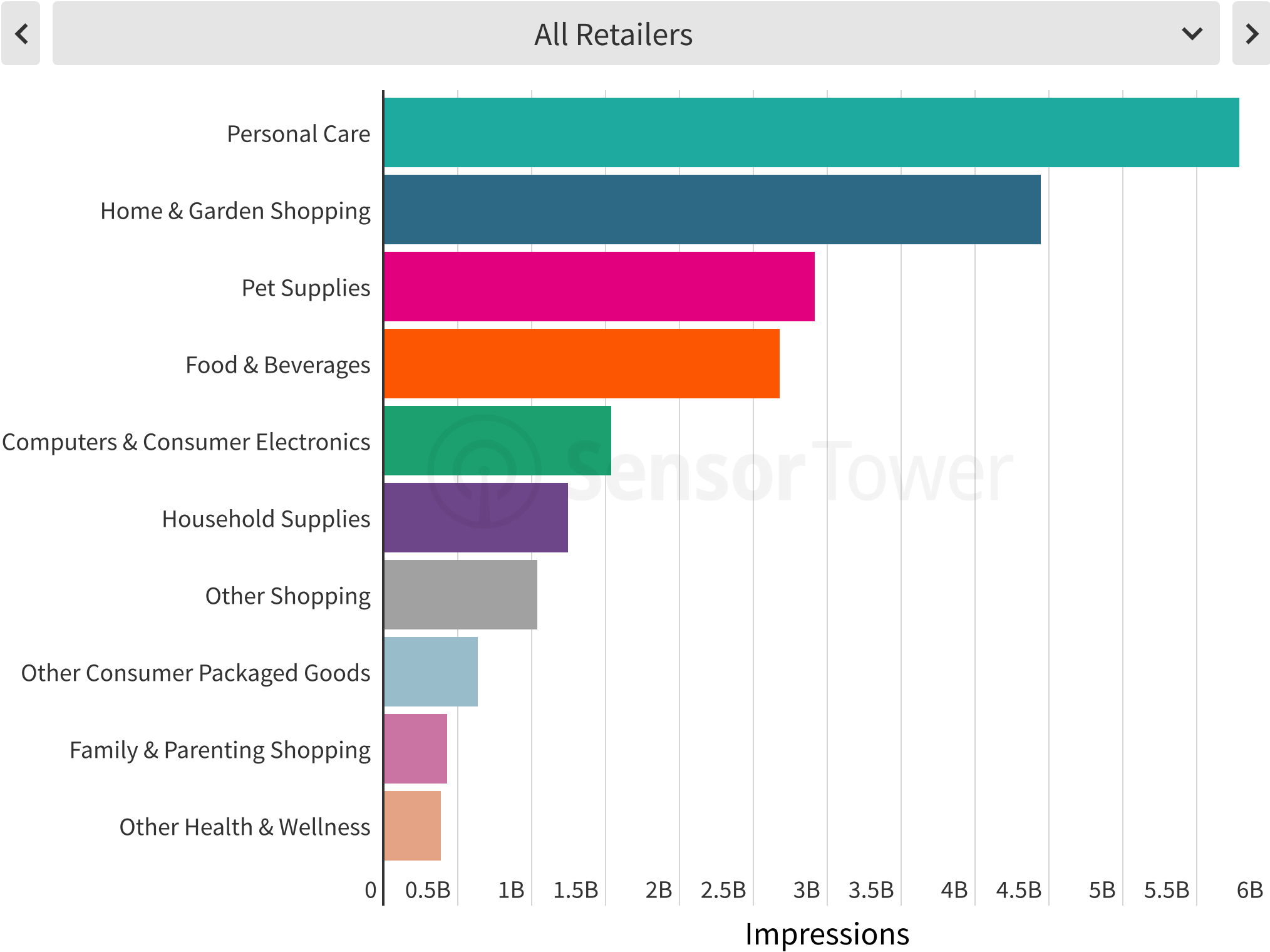
Home & Garden moved up from #4 last quarter to #2 this quarter. Home Depot and Lowe's are the top two retailers for the category. The Scotts Company took advantage of the spring months to advertise with both retailers.

**Definitions:**

**Category:** The category of the product being displayed in the advertisement. Cases where the retailer is advertising for its own brand, where the product is unidentifiable, or the advertisers are not currently tracked by Sensor Tower are excluded.

Source: Sensor Tower  
Note: Includes a selection of top US retailers. Excludes cases when the advertisers are not currently tracked by Sensor Tower. Data for June 2024 include select devices / channels and exclude Facebook and Instagram.

Top Categories by Retail Media Advertising Impressions in the United States in Q2 2024



# Know Your Options: Target and Walmart Provide Broad Coverage While Specialized Retailers Lead Some Categories

Walmart was among the top five retailers across each of the top categories in Q2 2024, while Target was among the top five in eight of the top 10.

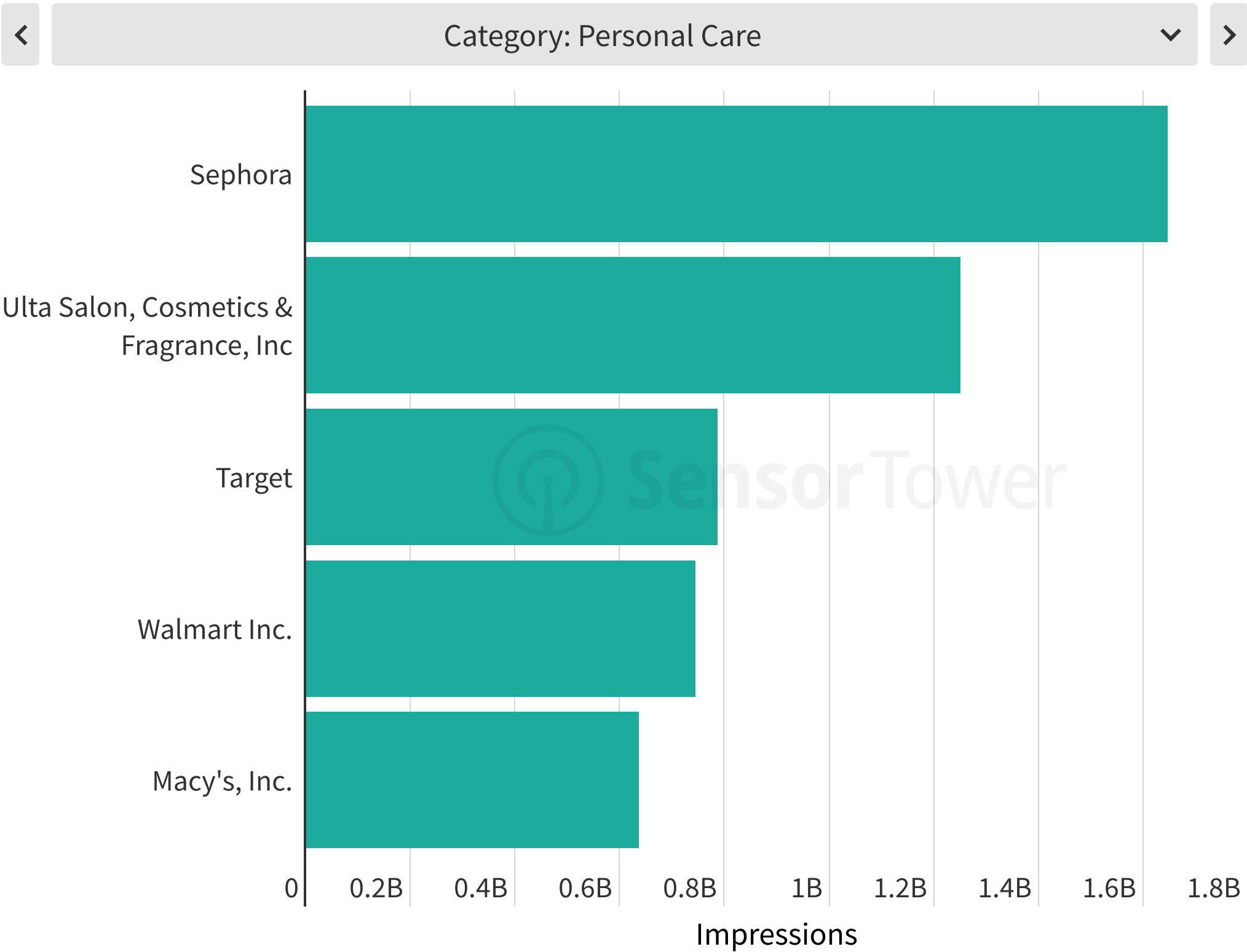
Some other categories have a dominant leader in the retail media space. Computers & Consumer Electronics, for example, had more than 60% of their impressions from Best Buy among the included retailers in the US.

**Definitions:**

**Category:** The category of the product being displayed in the advertisement. Cases where the retailer is advertising for its own brand, where the product is unidentifiable, or the advertisers are not currently tracked by Sensor Tower are excluded.

Source: Sensor Tower  
Note: Includes a selection of top US retailers. Excludes cases when the advertisers are not currently tracked by Sensor Tower. Data for June 2024 include select devices / channels and exclude Facebook and Instagram.

Top Retail Media Retailers by Category in the United States in Q2 2024







# Discover Which Brands Worked Closely with Top US Retailers to Highlight their Products in Q2 2024


Chewy and Purina PetCare were once again the top combination in Q2 2024. Purina PetCare featured more than 15 different products across more than 200 different creatives with Chewy.

Apple was a top Computers & Consumer Electronics advertiser with Target and Walmart and #3 for Best Buy.




Don't wait 'til it's too late. Stock up now and save 35% on your first Autoship order of pet faves.





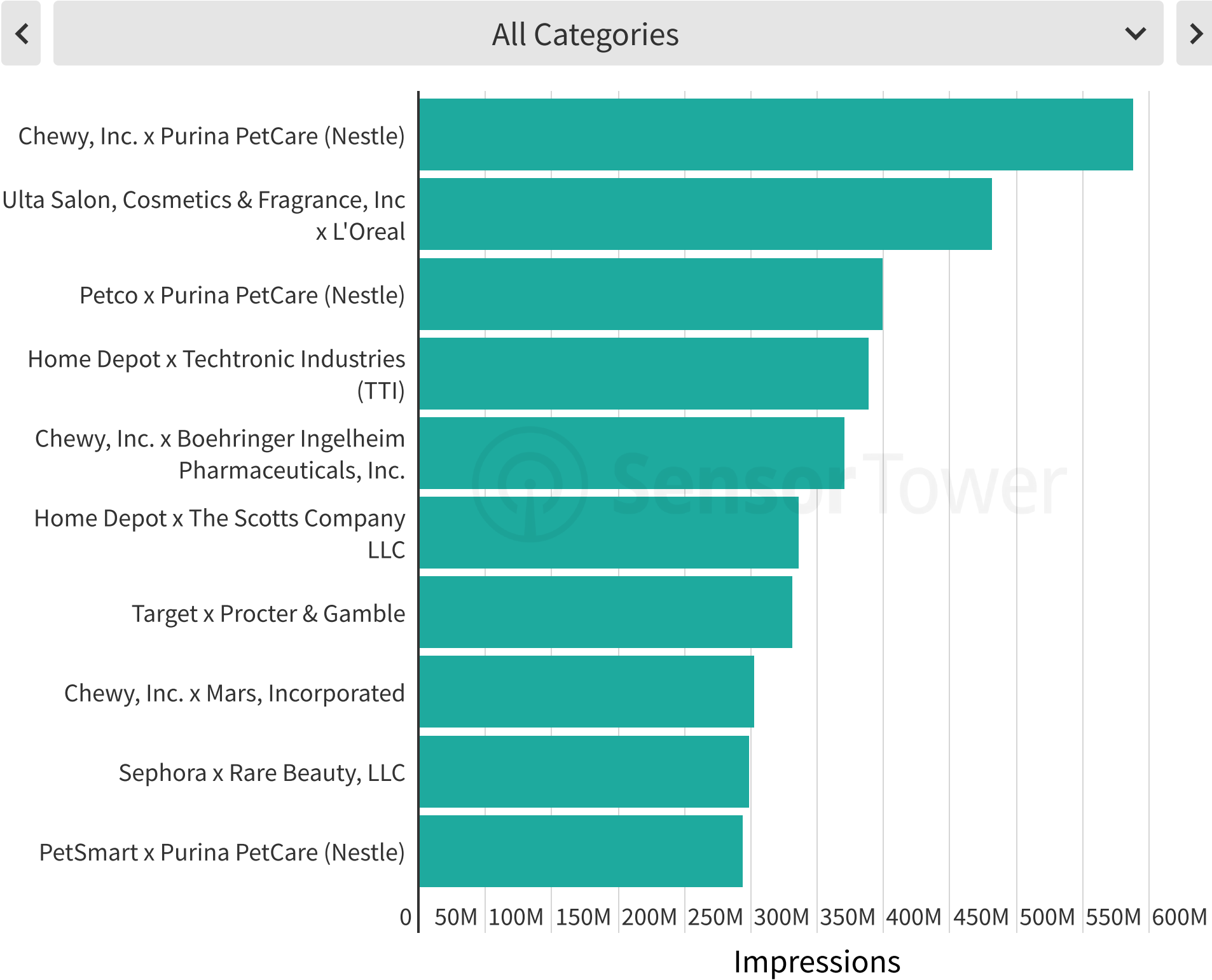
Retailer:  
Chewy



Advertiser:  
Purina

Source: Sensor Tower  
Note: Includes a selection of top US retailers. Data for June 2024 include select devices / channels and exclude Facebook and Instagram.

## Top Co-Branded Retailer / Advertiser Combinations in the United States in Q2 2024







# Dig Deeper into Co-Branded Advertising Partnerships and Opportunities with the Top Advertisers for Key Retailers

Some advertisers diversify their approach when it comes to retailer media. For example, L'Oreal is the top co-branded advertiser at Ulta and Macy's and ranks second at Target and Sephora.

Some new combinations also emerged this quarter. The Kraft Heinz Company and PepsiCo topped Walmart's chart by retail media impressions after not ranking among the top 10 last quarter.



This is big—MacBook Air with Apple M1 chip is only \$699 at Walmart. Amazing performance. Unbelievable price. Don't miss out.



**Retailer: Target**

**Co-Branded Advertiser: Apple Inc.**

**Product: MacBook Air**

Source: Sensor Tower  
Note: Includes a selection of top US retailers. Excludes advertising for retailer's own products.  
Top product is based on number of impressions where the creative was captured. Data for June 2024 include select devices / channels and exclude Facebook and Instagram.

Top Co-Branded Advertisers for United States Retailers  
by Impressions in Q2 2024

Retailer: Walmart Inc.			
Rank	Co-Branded Advertiser	Top Product	Example Creative
1	The Kraft Heinz Company	Heinz HomeStyle Gravy	Video Post
2	PepsiCo, Inc.	Lays	Video Post
3	Unilever	Dove	Video Post
4	Procter & Gamble	Tide Purclean Liquid Laundry Detergent	Video Post
5	The J. M. Smucker Company	Meow Mix	Video Post
6	The Clorox Company	Hidden Valley Ranch Seasoning	Video Post
7	General Mills	Blue Buffalo Dog Food	Video Post
8	ConAgra Foods, Inc.	Chef Boyardee	Video Post
9	Apple Inc.	MacBooks	Photo Post
10	CSC Brands (Campbell's Soup Company)	V8 Energy Sparkling	Video Post






# Appendix:

## Digital Advertising Ad Channels by Market

Data includes select channels in each market. Figures in this report represent the totals for these channels only, not across all digital formats.

- At this time, our technology allows us to report down to six individual streaming services: Hulu, Netflix, Peacock, Paramount+, tubi and PlutoTV. All other OTT campaigns outside of these six services are grouped into a single OTT Streaming Services (General) bucket.
- LinkedIn and Pinterest ad coverage was added in the United States in May 2023 and was excluded from year-over-year comparisons.

### Included Ad Channels by Market

Key:  Included ad channel  Recently added channel (only included on page 29)  Ad channel not included in market

Ad Channel	United States	Australia	Brazil	Canada	France	Germany	Italy	Mexico	New Zealand	Spain	United Kingdom
Facebook											
Instagram											
LinkedIn											
Pinterest											
Snapchat											
TikTok											
X											
YouTube											
Desktop Display											
Mobile Display											
OTT											
Desktop Video											





**SensorTower**



# About Sensor Tower

Sensor Tower is the source of truth for mobile app, digital advertising, and audience insights. Since 2013 our digital data estate has grown into the largest and most trusted among the biggest brands, media companies, investment firms, and mobile game and app publishers across the Americas, Europe, Africa, Asia, Middle East and the Pacific. We deliver the most robust picture of the mobile app and digital advertising ecosystems in the most privacy safe way possible.

Sensor Tower mobile app insights help mobile marketers and app and game developers capture consumer mindshare where they spend their time – their mobile devices.

Pathmatics by Sensor Tower Digital Advertising Insights help demystify the digital ad ecosystem – helping marketers drive waste from their budgets and better position their campaigns.

**Press Inquiries:** [press@sensortower.com](mailto:press@sensortower.com)





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**Request a free demo!**

A white curved arrow pointing from the right towards the 'Request a free demo!' button.

Get the latest insights on our blog: [sensortower.com/blog](https://sensortower.com/blog)

