

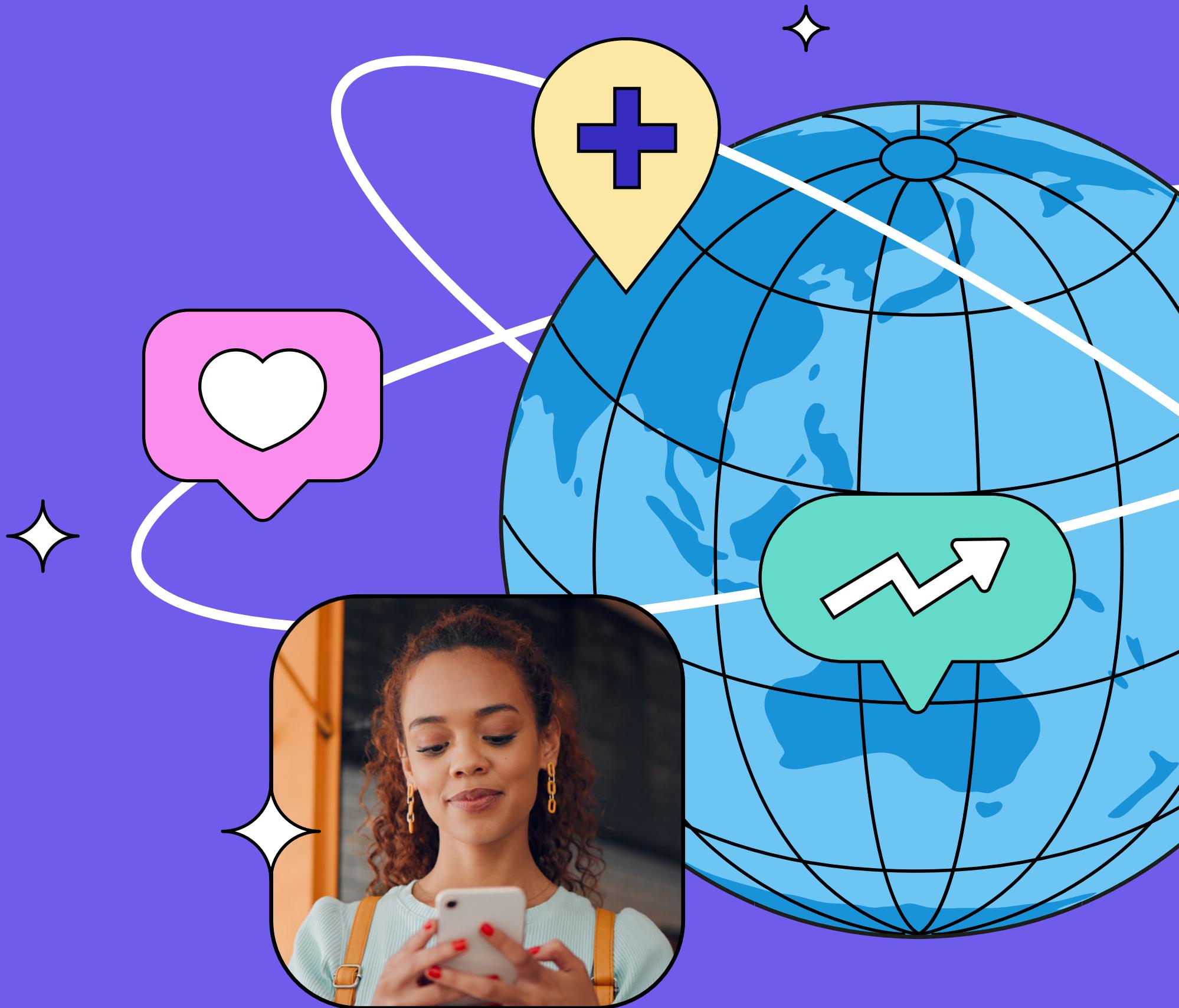


REPORT

The mobile app growth report: 2025 edition

Our user acquisition
leaderboard

ADJUST



Contents

Introduction.....	3
Methodology: The brand new Adjust Growth Score	5
The global growth map	6
Country scores	7
Global app vertical scores.....	8
Part 1: Growth by region	10
Focus on APAC: Country and vertical scores.....	11
Focus on Europe: Country and vertical scores	13
Focus on LATAM: Countries and verticals.....	15
Focus on MENAT: Countries and verticals	17
Focus on North America: Countries and verticals.....	19
Part 2: Spotlight on mobile gaming	21
Global Growth Scores	23
APAC Growth Scores	25
Europe Growth Scores.....	25
LATAM Growth Scores.....	27
MENAT Growth Scores.....	29
North America Growth Scores.....	31
Conclusion	33

INTRODUCTION

Mapping the future of mobile app growth

Global app growth is stable in 2025 so far, with installs up 11% year-over-year (YoY) and sessions up 10% YoY in the first half of the year. With acquisition and engagement rising in tandem, it's an exciting time to ignite growth and scale strategically in markets offering the most potential for each app vertical and business model.

Since 2019, Adjust's Mobile app growth report has helped marketers identify these opportunities, comparing potential across regions, countries, and verticals. Each edition has evolved alongside the industry's transformation—from new privacy frameworks to changing platform policies and user behavior.

Today, acquisition costs are higher, user journeys are more fragmented, and competition for attention is intensifying. Yet, this challenging period is also marked by progress and innovation. Marketers are rapidly embracing next-generation technologies and strategies, including AI-driven analysis and optimization. They are also advancing in contextual and hyper-personalized targeting while complementing attribution data with marketing mix modeling (MMM) and incrementality to enable faster, smarter decision-making.

In line with the industry shifts, the Adjust Growth Score has been reworked to take more factors into account. In addition to installs and cost efficiency, it now incorporates sessions per user per day and a composite retention score, which are clearer indicators of user quality and downstream value. With this update, the mobile app growth report 2025 builds on Adjust's mission to give marketers clarity in a fast-moving landscape, helping them prioritize investment, navigate uncertainty, and uncover the markets where acquisition can deliver fast wins and long-term app growth.



66

“The challenge for marketers today isn’t a lack of data, it’s knowing which signals matter most. With engagement and retention just as critical as install volume and cost efficiency, the Growth Score encapsulates the metrics that truly reflect holistic opportunities in 2025. By translating complex performance dynamics into a single, comparable score, it provides the clarity marketers need to prioritize investments, capture opportunities, and sustain growth in an increasingly competitive landscape.”

ADJUST



Tiahn Wetzler
Director,
Content & Insights

METHODOLOGY

The brand new Adjust Growth Score

The Adjust Growth Score is designed to benchmark the performance and potential of apps across a wide variety of markets. For the 2025 edition, we analyzed Adjust's dataset of the top 5000 apps and their performance in the first half of the year.

The score is built on four inputs:

- **Installs**, capturing acquisition volume.
- **Cost efficiency** (inverse CPI), showing how effectively those installs are achieved.
- **Engagement** (sessions per user per day), representing activity beyond the download.
- **Retention**, a composite measure of how long users stay active.

Together, these inputs balance scale, efficiency, and quality. Each metric is weighted to underscore its importance:

installs at 40%, cost efficiency at 20%, engagement at 20%, and retention at 20%. Because install volumes vary dramatically, from thousands in smaller markets to millions in larger ones, all values were normalized to ensure fair comparisons. This makes it possible to compare countries, regions, and verticals on a level playing field.

In the previous editions, lifetime value (LTV) was included in the score. In 2025, LTV was replaced by retention and engagement, which provide earlier and more reliable signals of user quality, monetization potential, and downstream conversion.

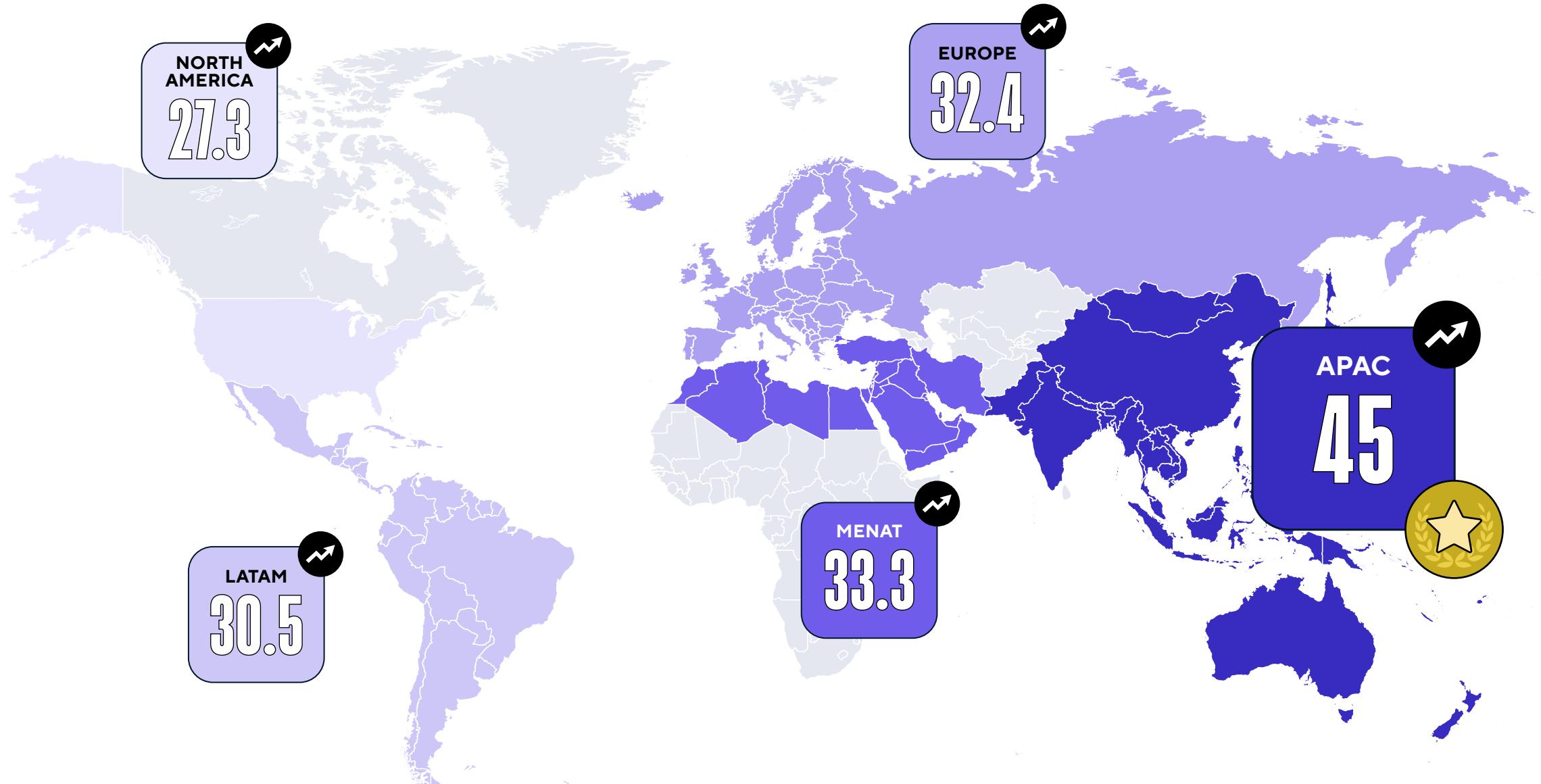
Finally, all values were scaled to a range of 0-100. Regional scores may appear higher than individual country scores, since they aggregate larger install volumes and broader user behavior. This makes regional scores useful for high-level benchmarking, while country-level scores highlight more specific opportunities.



The global growth map

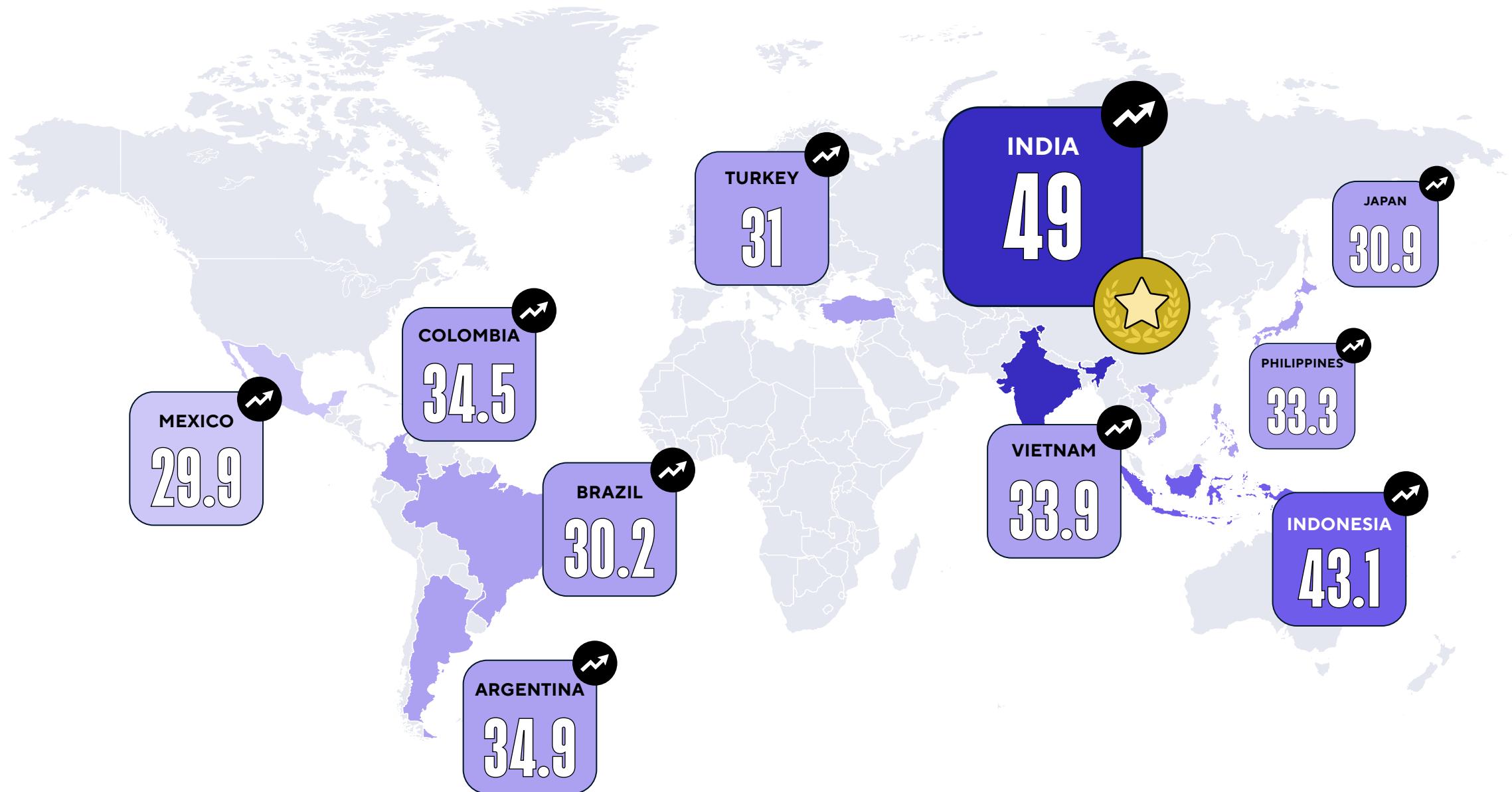
The global Growth Score averaged 29.2 in H1 2025. This highlights overall trends in app growth worldwide, serving as a reference point and benchmark for evaluating regional and country-level performance.

At the regional level, APAC leads with a score of 45, ahead of all other regions. MENAT (33.3), Europe (32.4), and LATAM (30.5) are in the mid-range, while North America is at 27.3, indicating its maturity and slower expansion compared to emerging markets.



Country scores

India tops the country rankings with a Growth Score of 49, demonstrating both market size and engagement potential. Indonesia follows at 43.1, while Argentina (34.9), Colombia (34.5), and Vietnam (33.9) round out the top five. The Philippines (33.3), Türkiye (31), and Japan (30.9) perform just below this tier, with Brazil (30.2) and Mexico (29.9) completing the global top ten. Together, these markets highlight the strength of emerging economies in driving mobile growth, with India and Southeast Asia setting the pace.



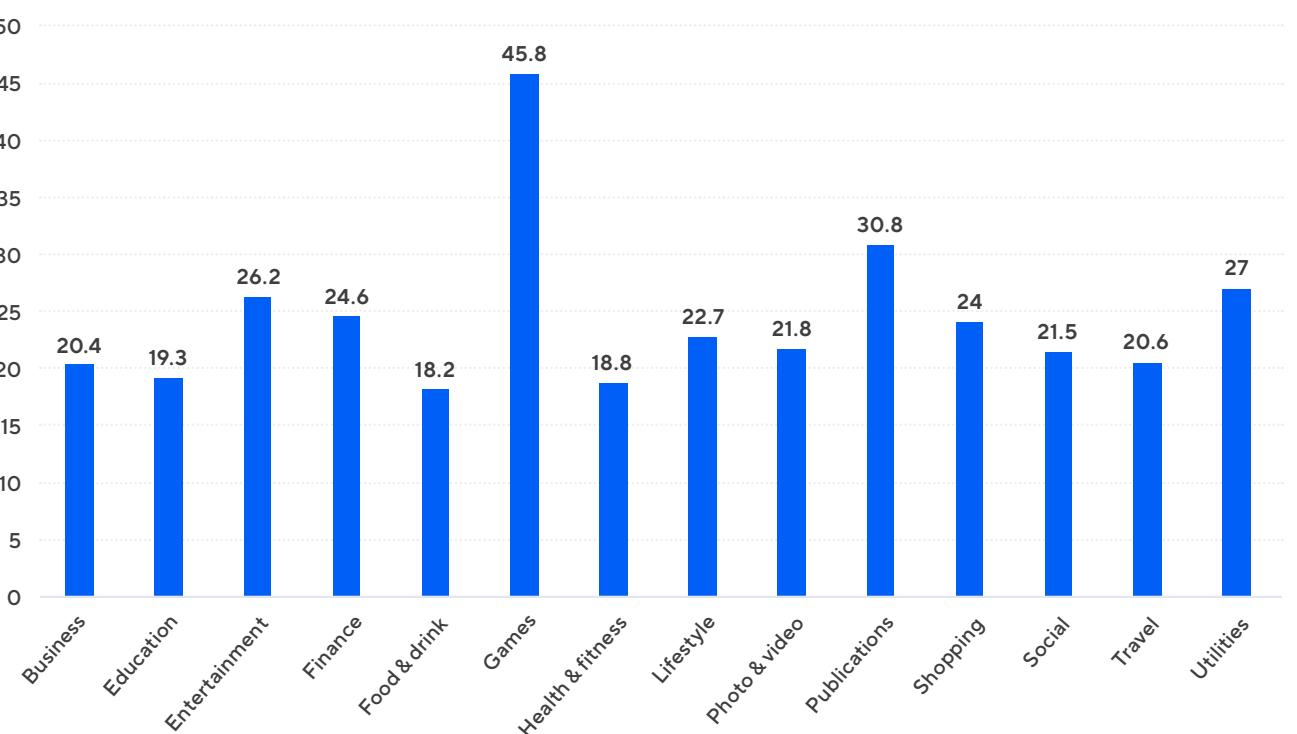
Global app vertical scores

Games recorded the highest Growth Score in H1 2025 at 45.8. This performance mirrors wider industry momentum where global gaming installs rose 4% YoY in 2024 and a further 1% YoY in the first half of 2025, with [mobile gaming revenue projected to surpass \\$126 billion](#) this year. Beyond gaming, publications ranked second with a score of 30.8, while utilities (27), entertainment (26.2), and finance (24.6) completed the top five.

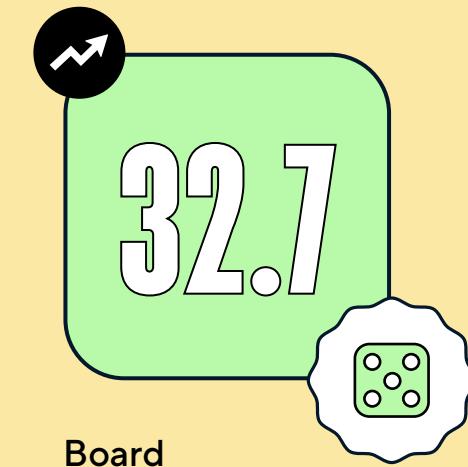
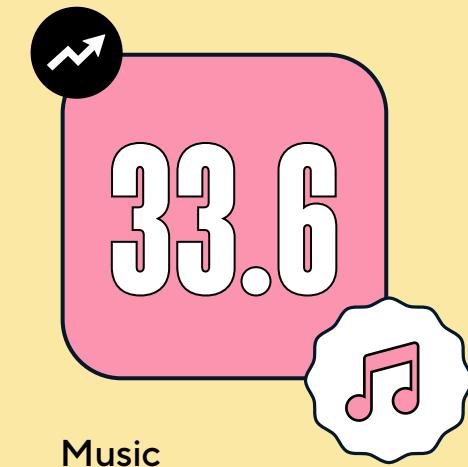
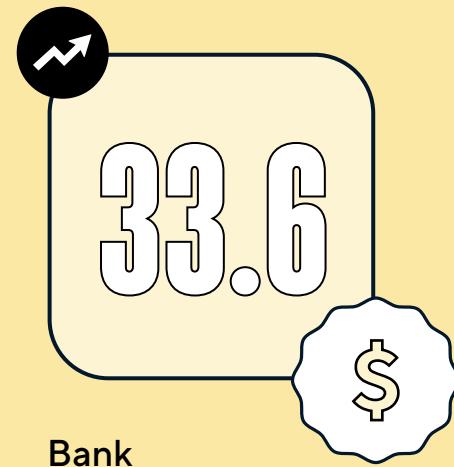
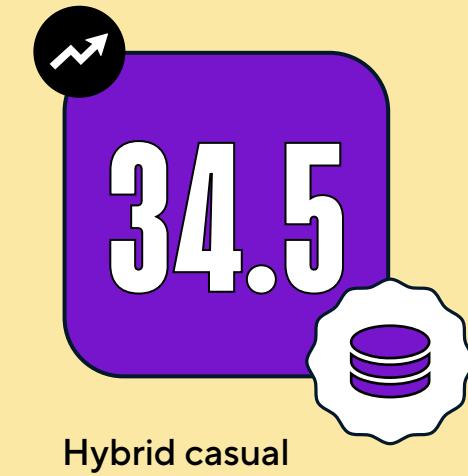
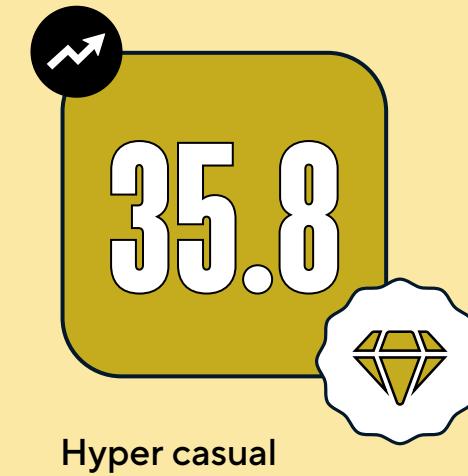
Shopping (24), lifestyle (22.7), and photo & video (21.8) sat in the mid-range, signaling steady demand but greater competition.

Education (19.3), health & fitness (18.8), and food & drink (18.2) posted the lowest scores, across larger audiences compared to higher-performing categories.

App Growth Scores by vertical 2025 (Global)

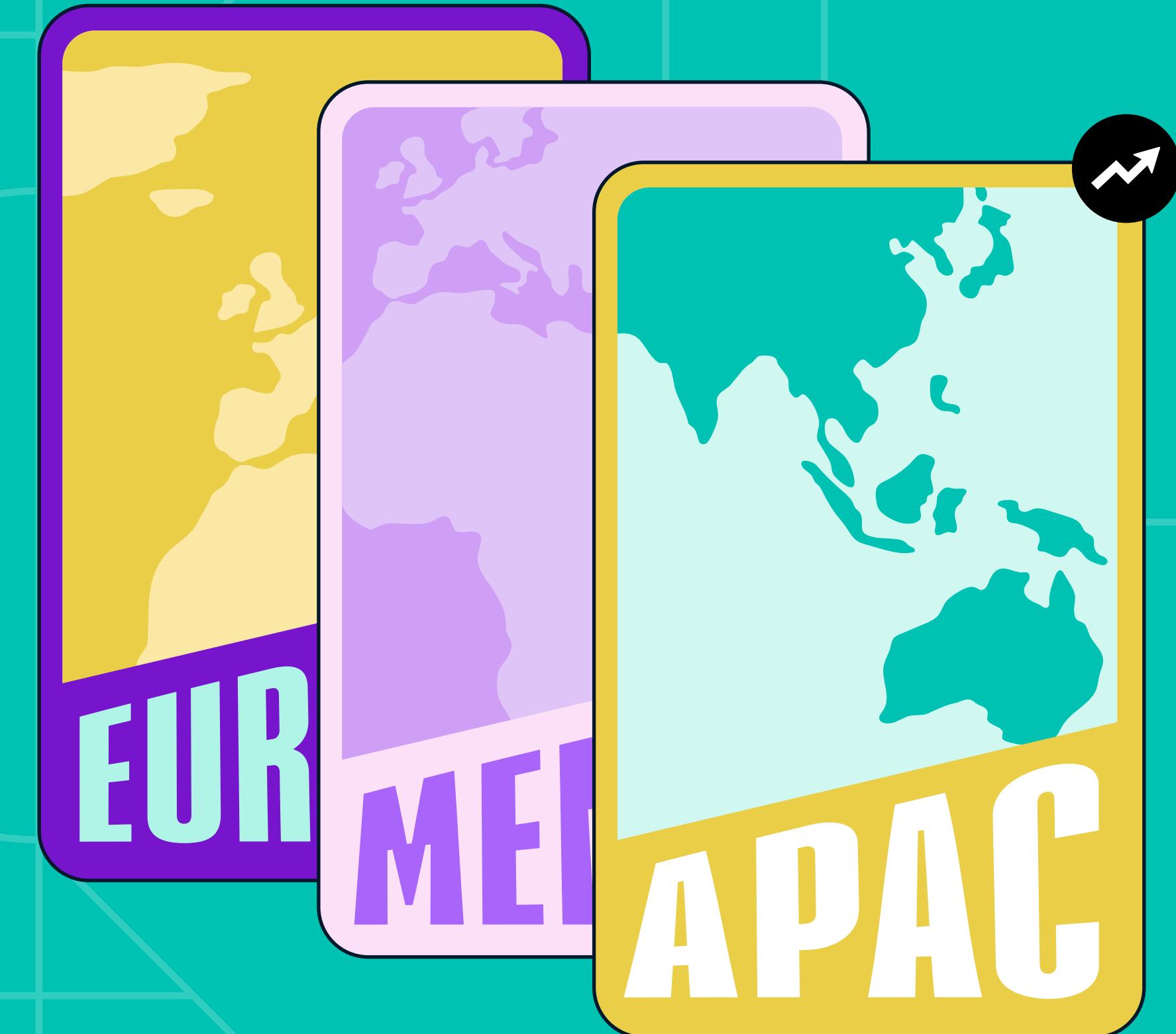


Bonus: App Growth Scores by subvertical 2025 (Global)

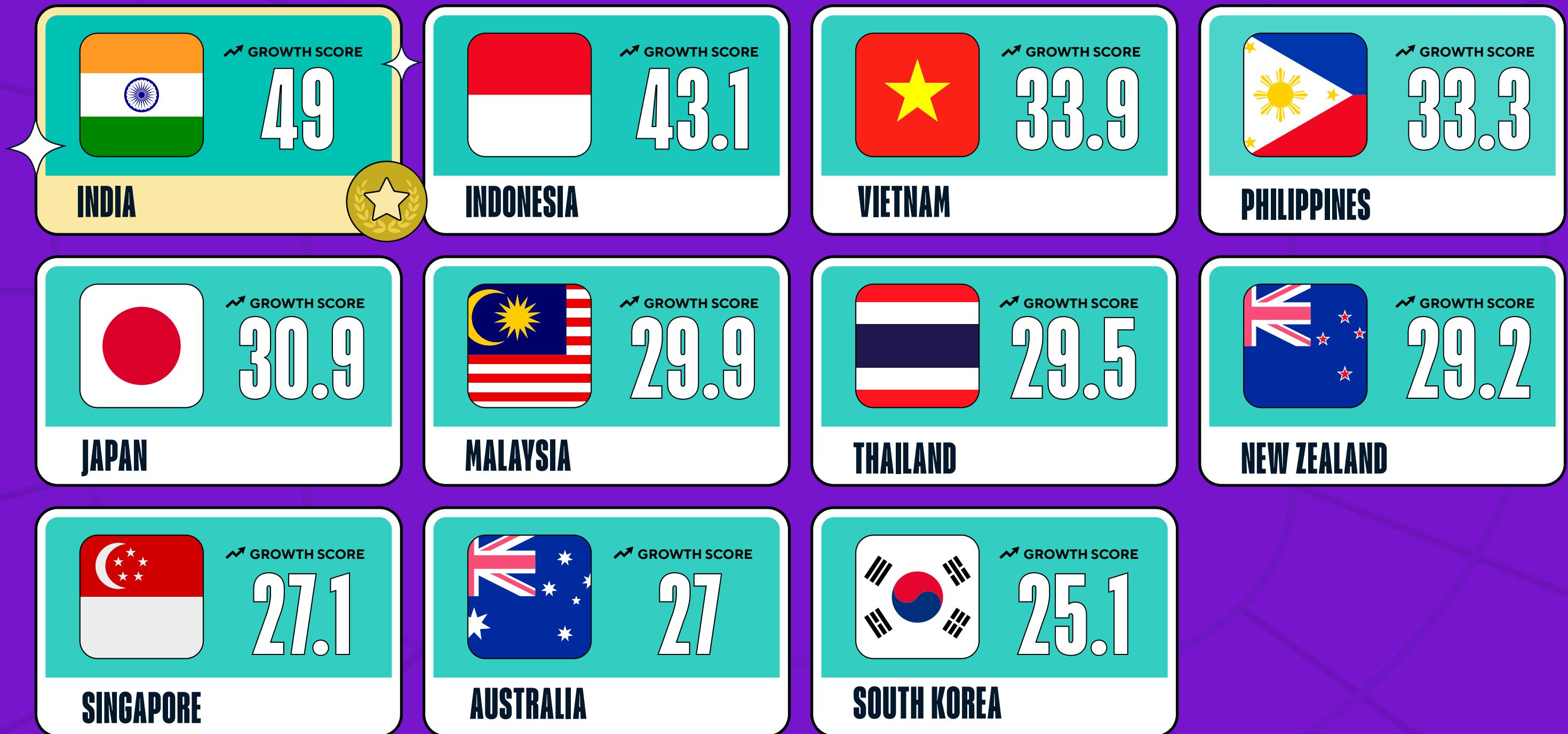


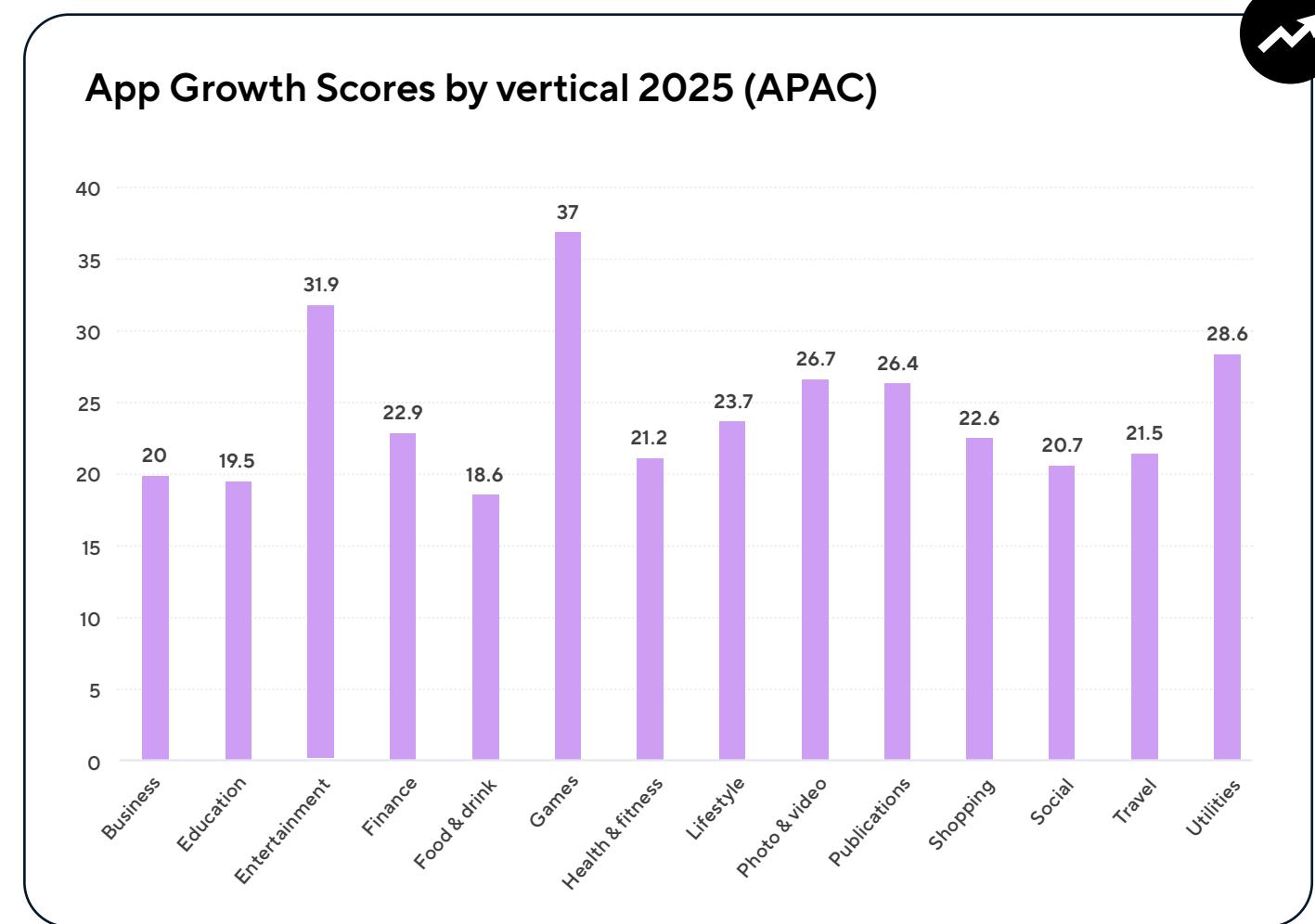
PART 1

Growth by region



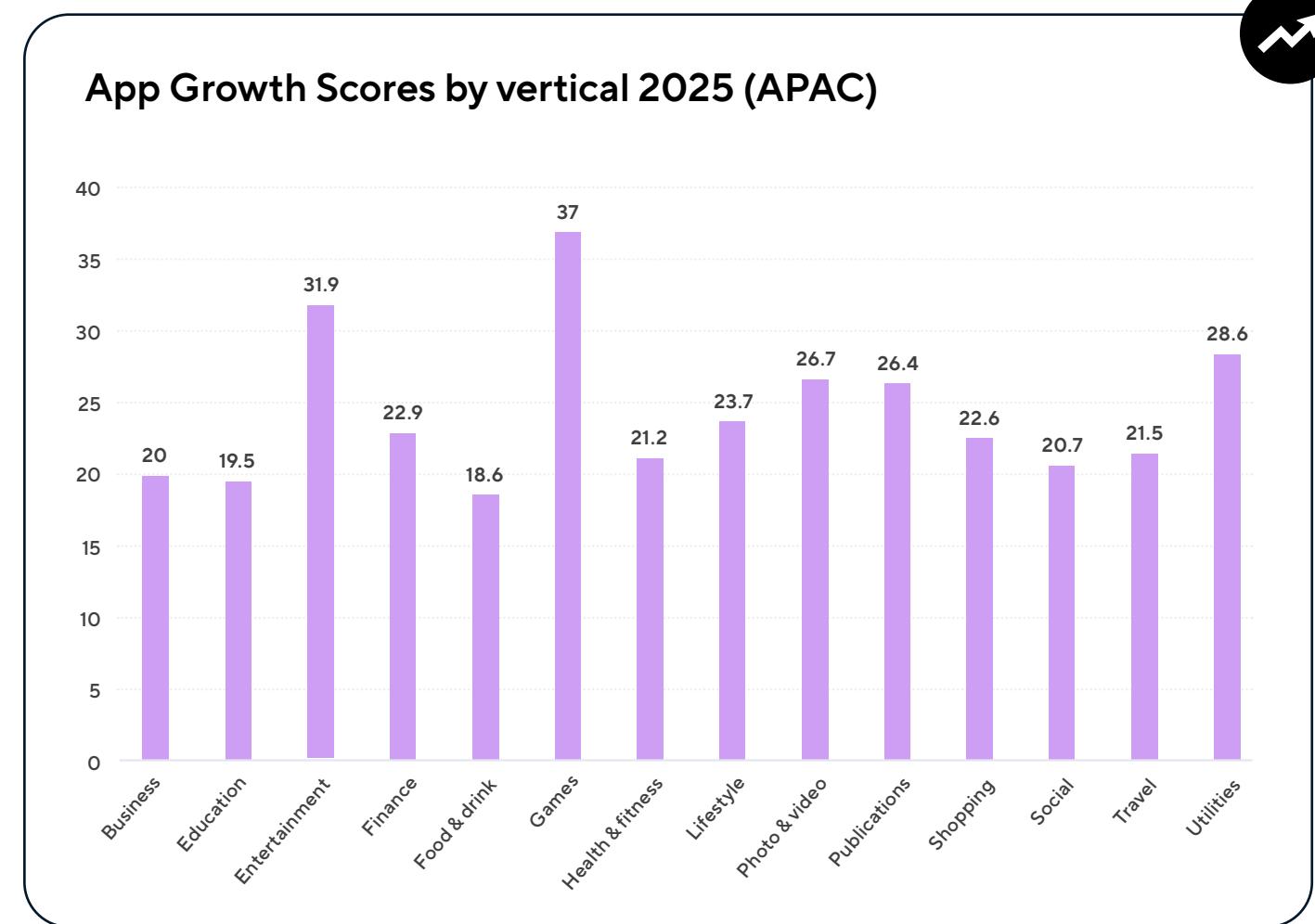
Focus on APAC: Country and vertical scores





In APAC, games remain the dominant vertical with a Growth Score of 37. Entertainment follows at 31.9, supported by strong demand for video and social apps, while utilities (28.6), photo & video (26.7), and publications (26.4) also secured positions in the top 5.

Finance recorded a score of 22.9, showcasing steady adoption of mobile-first banking and payment solutions across emerging markets. Shopping followed closely at 22.6, fueled by the region's e-commerce boom, though competition is heating up.



Top non-gaming app Growth Scores by country and subvertical 2025 (APAC)

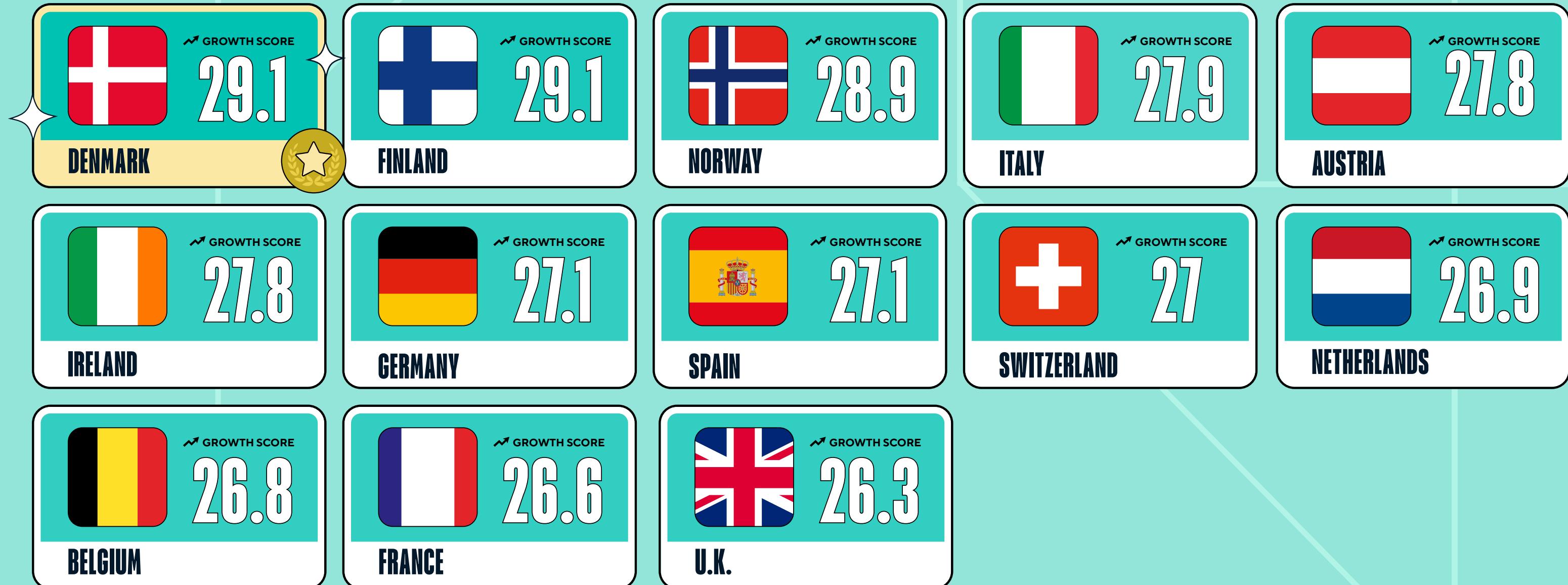
Country	Subvertical	Growth Score
Vietnam	Maps & navigation	58.1
India	Music & audio	50.5
India	Entertainment	42
Vietnam	Social network	40.6
Malaysia	Social	38.5
India	Utilities	37.6
Japan	Dating	37.2
India	Photo & video	37.1
Australia	Dating	34.2
Indonesia	Music & audio	34.1



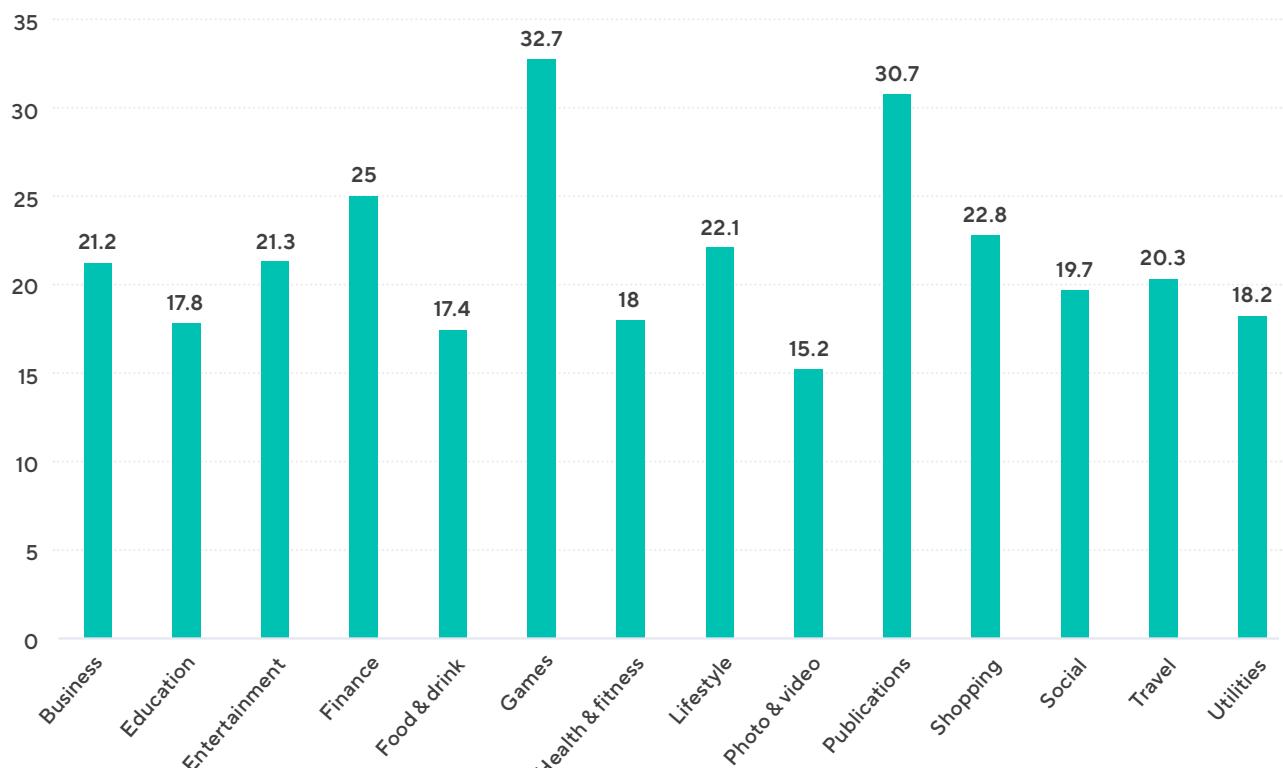
ABOUT THIS TABLE

This table shows the top 10 non-gaming app Growth Scores in APAC by subvertical and country in H1 2025. It spotlights leading country and subvertical combinations, showing areas with strong growth potential in APAC.

Focus on Europe: Country and vertical scores



App Growth Scores by vertical 2025 (Europe)



In Europe, it was also games that emerged as the top vertical, with a Growth Score of 32.7, thanks to strong monetization and steady user retention. The market is projected to expand at a [CAGR of 7.8% through 2030](#), underscoring its long-term revenue potential even as growth is not as supercharged as some other regions, like APAC.



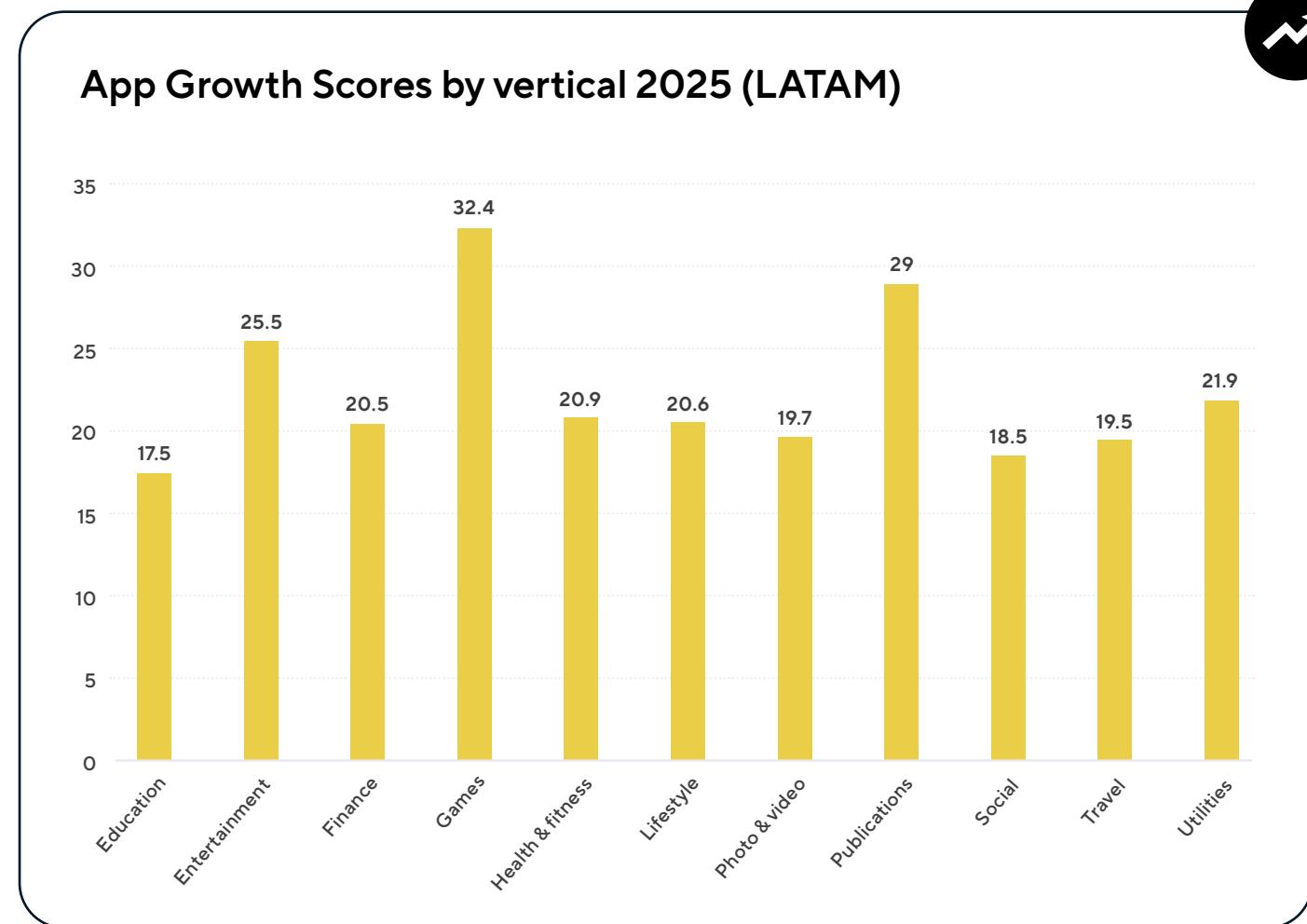
Top non-gaming app Growth Scores by country and subvertical 2025 (Europe)

Country	Subvertical	Growth Score
France	Dating	31
Germany	Dating	30.5
U.K.	Dating	30
Austria	Entertainment	25.9
Finland	Health & fitness	25.7
Netherlands	Travel	24.9
Italy	Finance	24.4
Finland	Utilities	23.7
Belgium	Lifestyle	23.6
Germany	Finance	23.4

Outside gaming, publications stand out with a score of 30.7. Utilities (28.6) also perform well, while entertainment (21.3) trails lower. Finance (25) and shopping (22.1) continue to grow but face tougher competition.

Focus on LATAM: Country and vertical scores





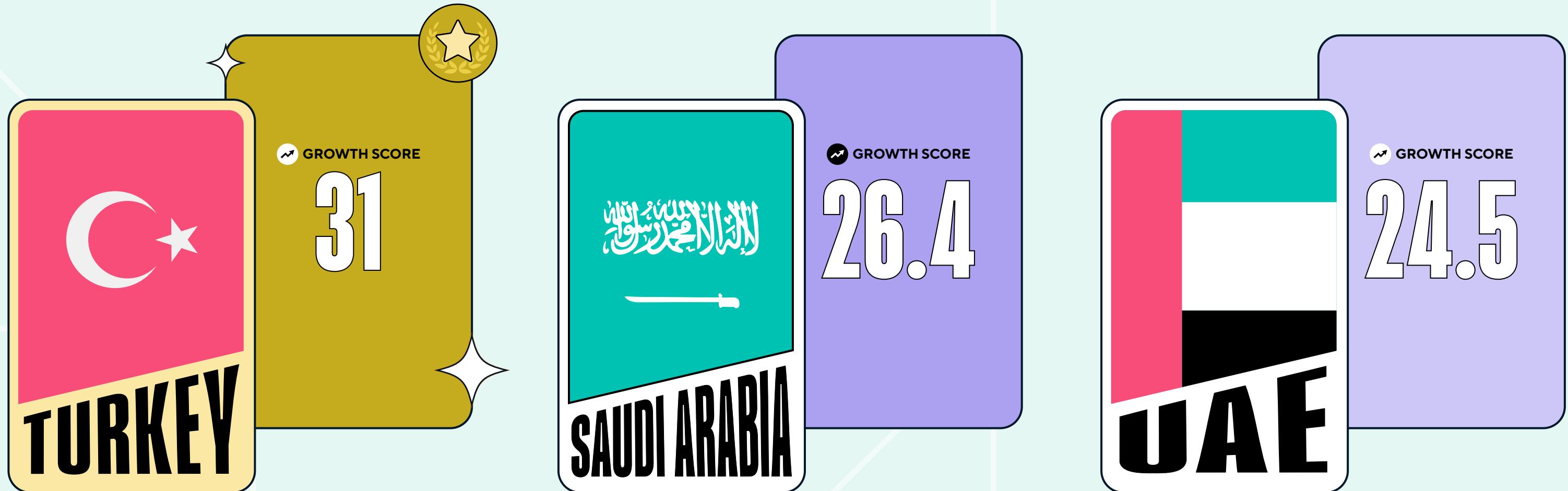
The mobile app industry in LATAM is projected to reach [\\$35.9 billion in revenue by 2030](#), driven by rapid smartphone adoption and improving connectivity. Games remain the region's standout vertical with a Growth Score of 32.4, and the LATAM gaming market is forecast to grow at a [10.6% CAGR through 2030](#), reaching nearly \$13.6 billion and reinforcing its role as one of the region's fastest-growing app categories.

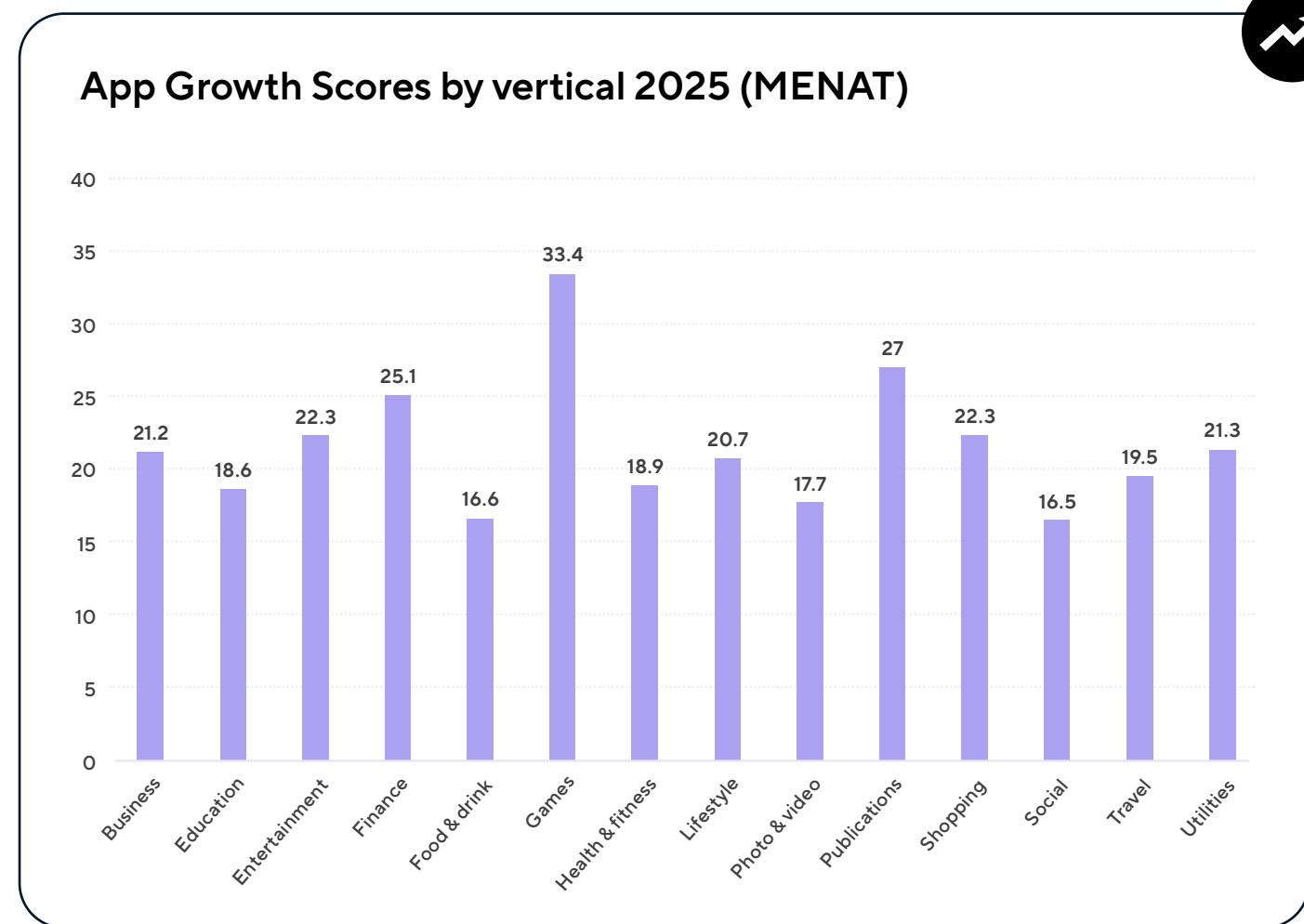
Top non-gaming app Growth Scores by country and subvertical 2025 (LATAM)

Country	Subvertical	Growth Score
Colombia	Social	38.3
Argentina	Entertainment	32.8
Colombia	Music & audio	31.8
Colombia	Entertainment	30.9
Argentina	Music & audio	30.7
Colombia	Utilities	28.5
Colombia	Travel	28.1
Mexico	Publications	27.5
Brazil	Travel	26.7
Argentina	Utilities	26.3

Beyond gaming, publications scored 29 and entertainment followed at 25.5. Utilities also posted a solid 21.9.

Focus on MENAT: Countries and verticals



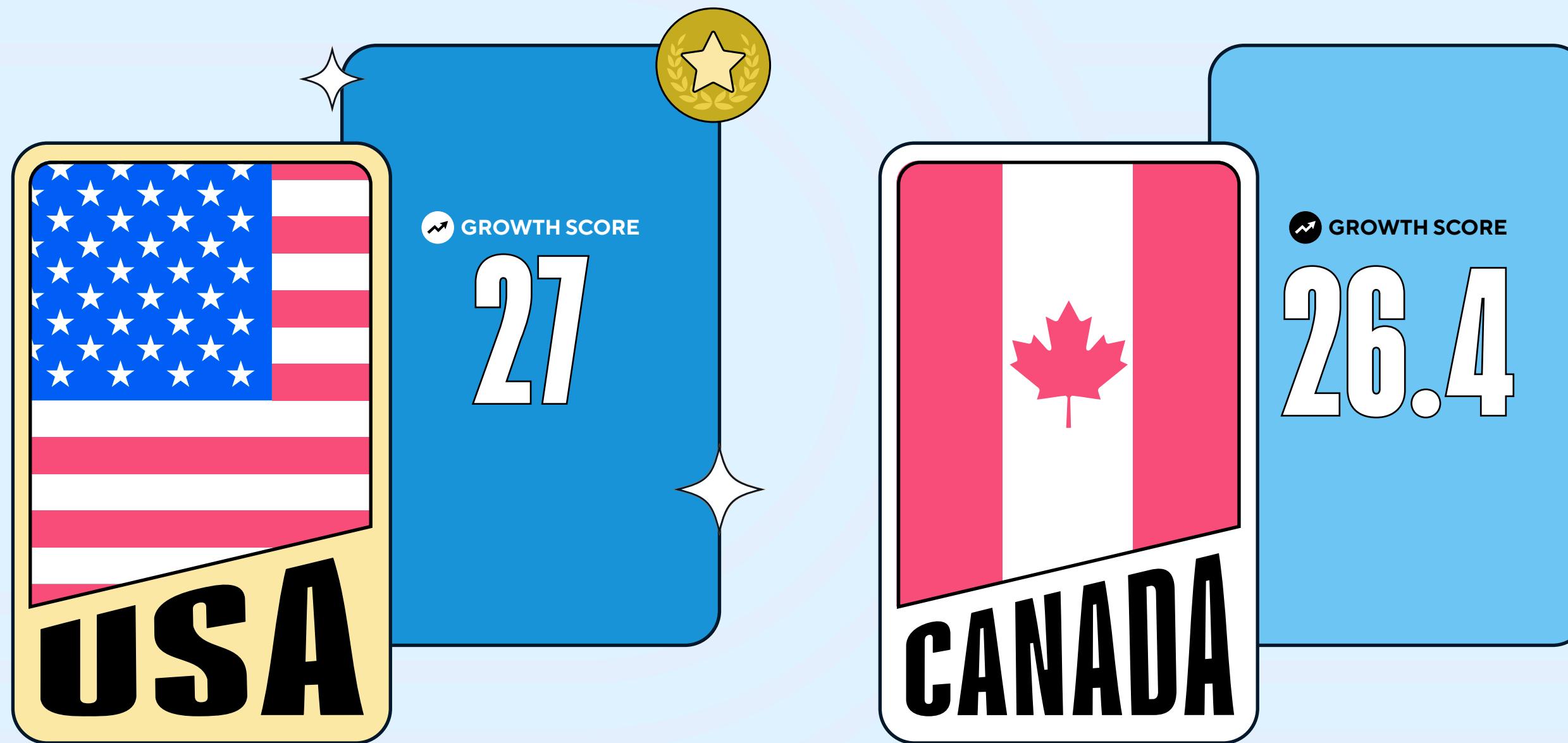


Top non-gaming app Growth Scores by country and subvertical 2025 (MENAT)

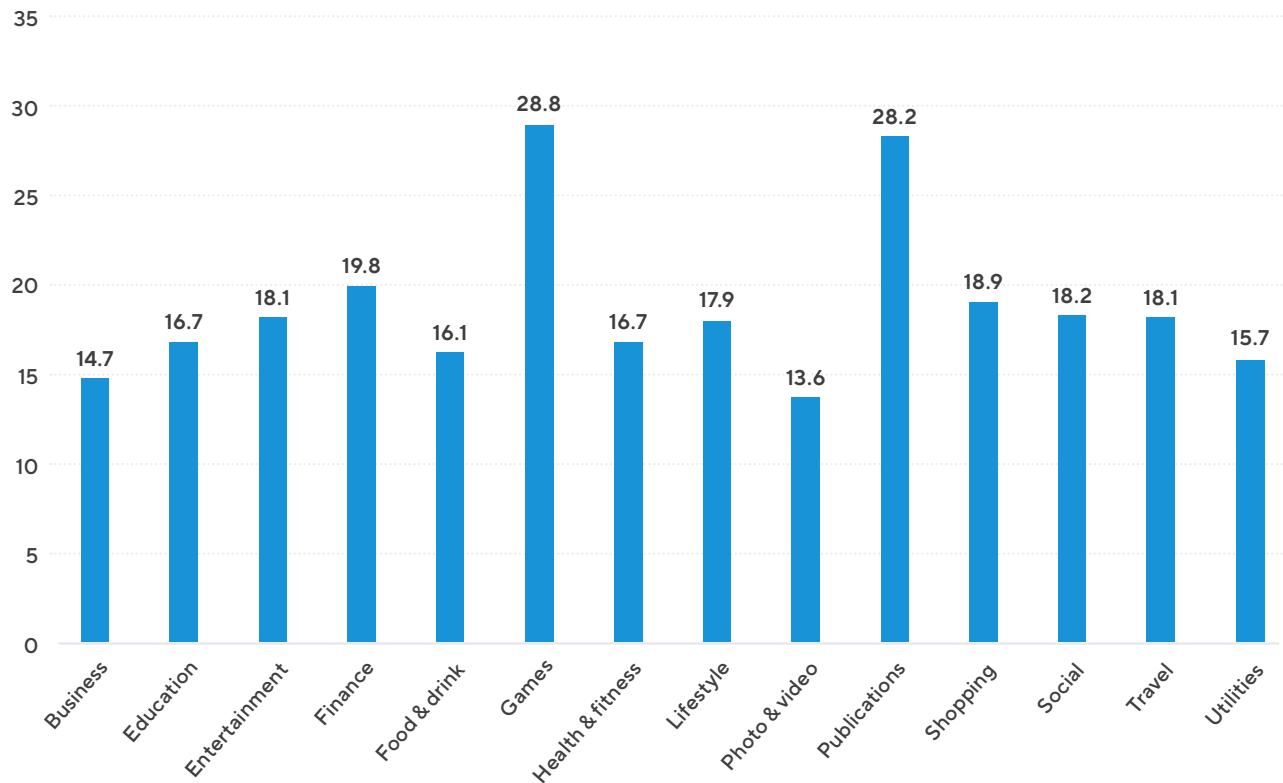
Country	Subvertical	Growth Score
🇹🇷 Türkiye	🎵 Music & audio	📈 28.2
🇹🇷 Türkiye	🎥 Entertainment	📈 25.6
🇹🇷 Türkiye	🎥 Entertainment	📈 23.7
🇹🇷 Türkiye	⌚ Lifestyle	📈 23.4
🇹🇷 Türkiye	🔧 Utilities	📈 23
🇹🇷 Türkiye	🛍 Shopping	📈 22.7
🇹🇷 Türkiye	✈ Travel	📈 21.9
🇦🇪 UAE	🎵 Music & audio	📈 21.8
🇸🇦 Saudi Arabia	🎵 Music & audio	📈 21.3
🇹🇷 Türkiye	🎓 Education	📈 20.3

In MENAT, it is once again games that hold the top position, with a Growth Score of 33.4. The region's gaming sector is projected to generate [\\$3.73 billion in 2025](#), fueled by a young, mobile-first population and targeted investment. Publications followed with a score of 27, while finance reached 25.1 on the back of mobile-first banking and digital payments. Entertainment and shopping each recorded 22.3.

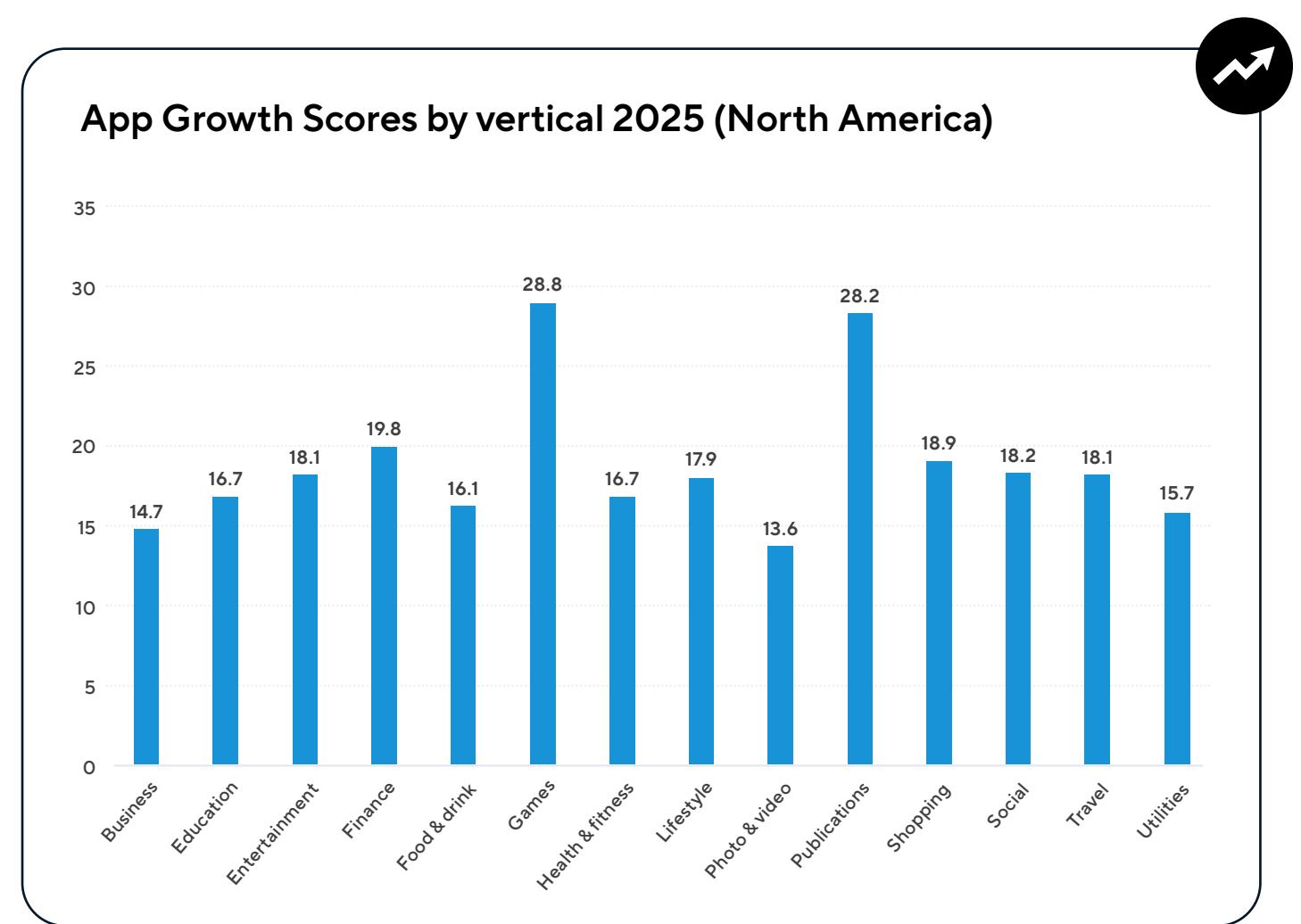
Focus on North America: Countries and verticals



App Growth Scores by vertical 2025 (North America)



In North America, games (again!) and publications stand out with Growth Scores of 28.8 and 28.2, both above the regional score of 27.3. The mobile gaming market revenue in North America is projected to reach [\\$55 billion by 2030](#), but unlike faster-growing markets, growth here is driven less by new users and more by higher average revenue per user (ARPU) and advanced monetization models. The region also dominates the global news app market, accounting for [36.5% of total share](#).



Top non-gaming app Growth Scores by country and subvertical 2025 (North America)

Country	Subvertical	Growth Score
Canada	Dating	32.4
U.S.	Dating	23.7
Canada	Publications	22.2
U.S.	Messaging	21.6
U.S.	Publications	20.3
Canada	Music & audio	19.7
Canada	Entertainment	19.6
Canada	Lifestyle	19.5
U.S.	Travel	19.2
U.S.	Social network	19.1

Finance apps came third with 19.8, followed by shopping (18.9), social (18.2), and entertainment and travel (both 18.1).

PART 2

Spotlight on mobile gaming: A deep dive

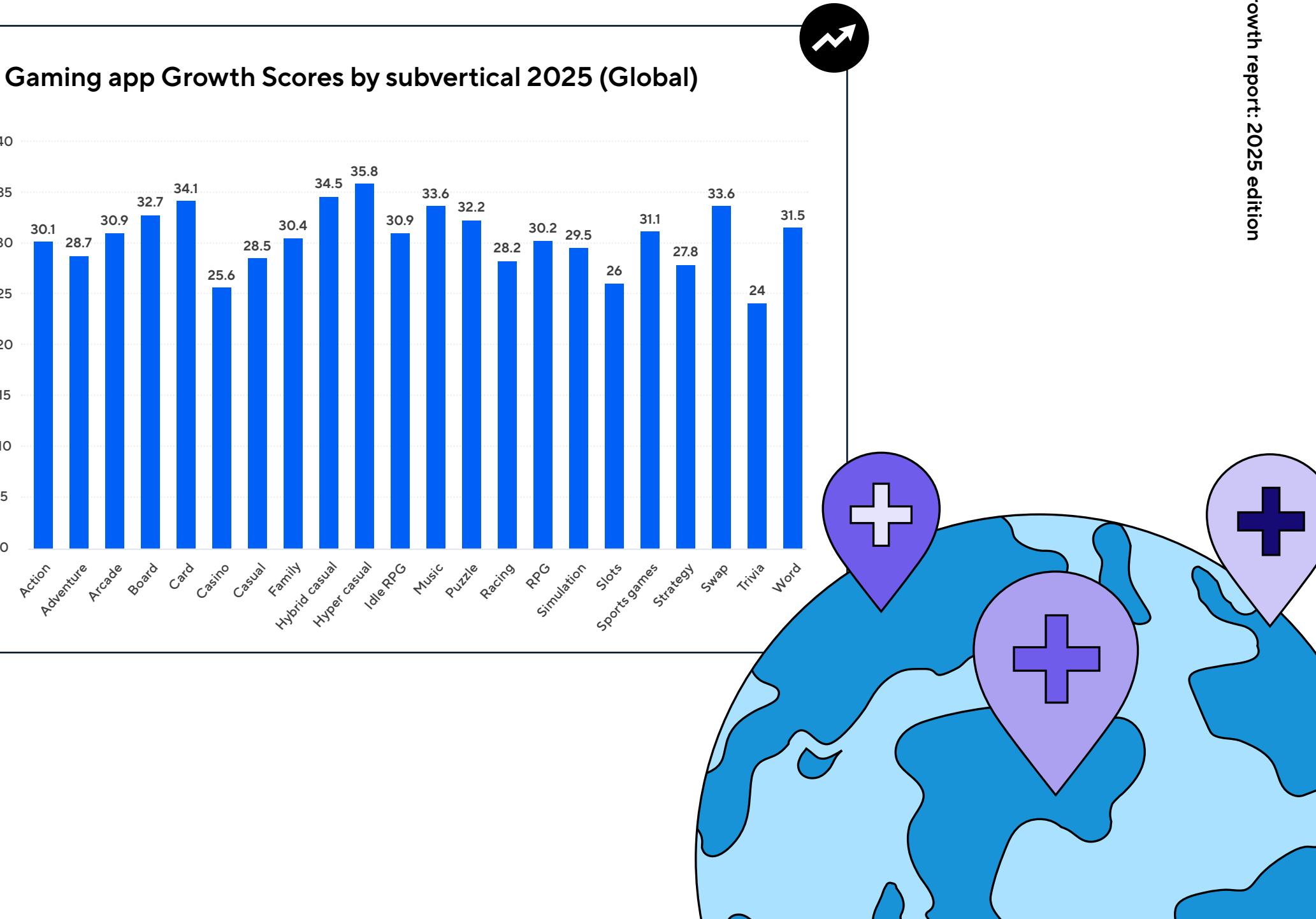




Global Growth Scores

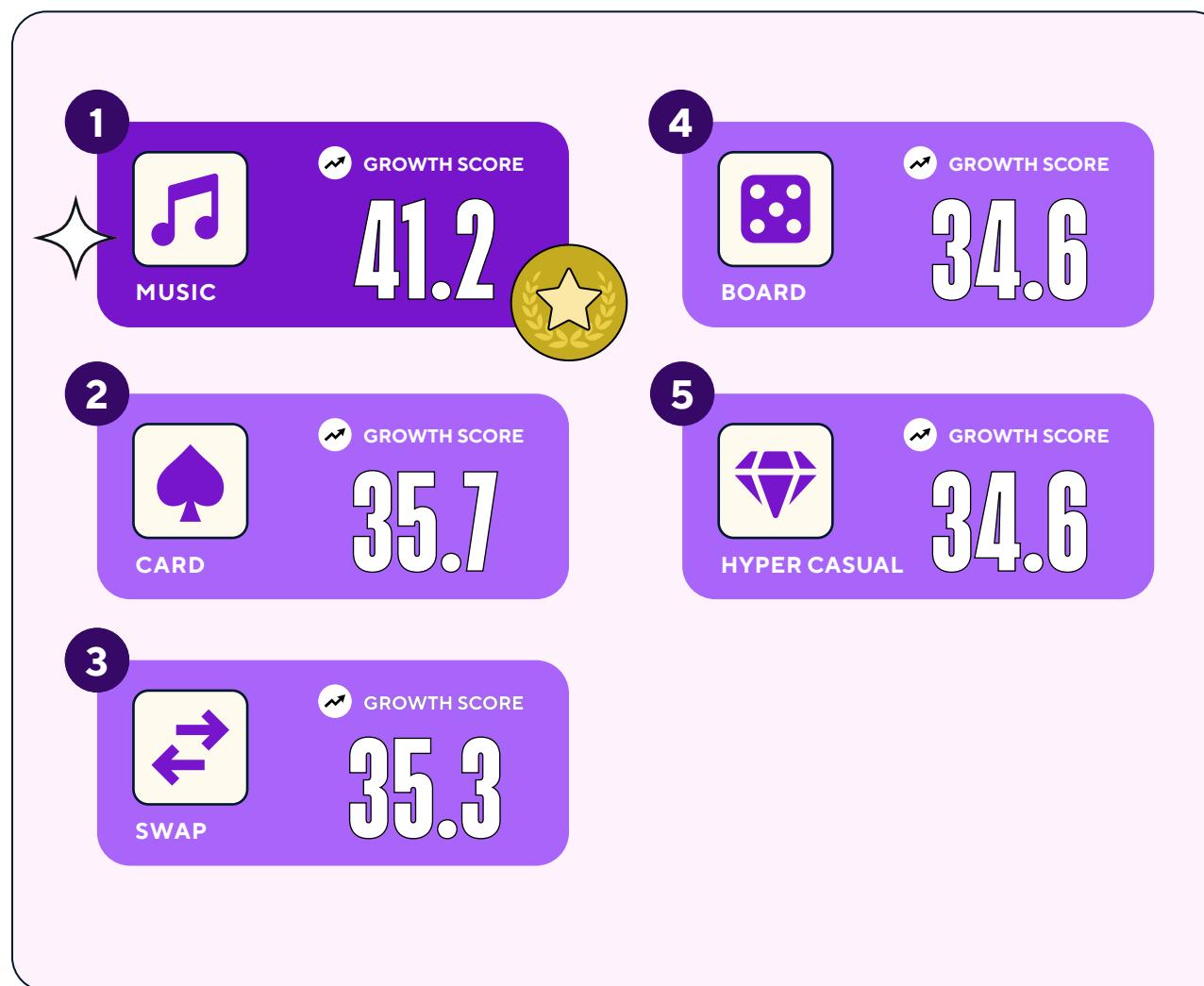
Gaming continues to anchor mobile growth in 2025, with a Growth Score of 45.8, the highest of any vertical globally. This strength, combined with the variation across subgenres, regions, and countries, makes gaming a natural focus for a deeper dive in this report.

Globally, hyper casual leads with a Growth Score of 35.8, highlighting its mass-market reach and low barriers to entry. Hybrid casual (34.5) and card (34.1) also perform strongly, while genres such as music (33.6), swap (33.6), and board (32.7) benefit from replayability and community-driven features that support engagement.



APAC Growth Scores

Top 5 gaming subvertical Growth Scores 2025 (APAC)



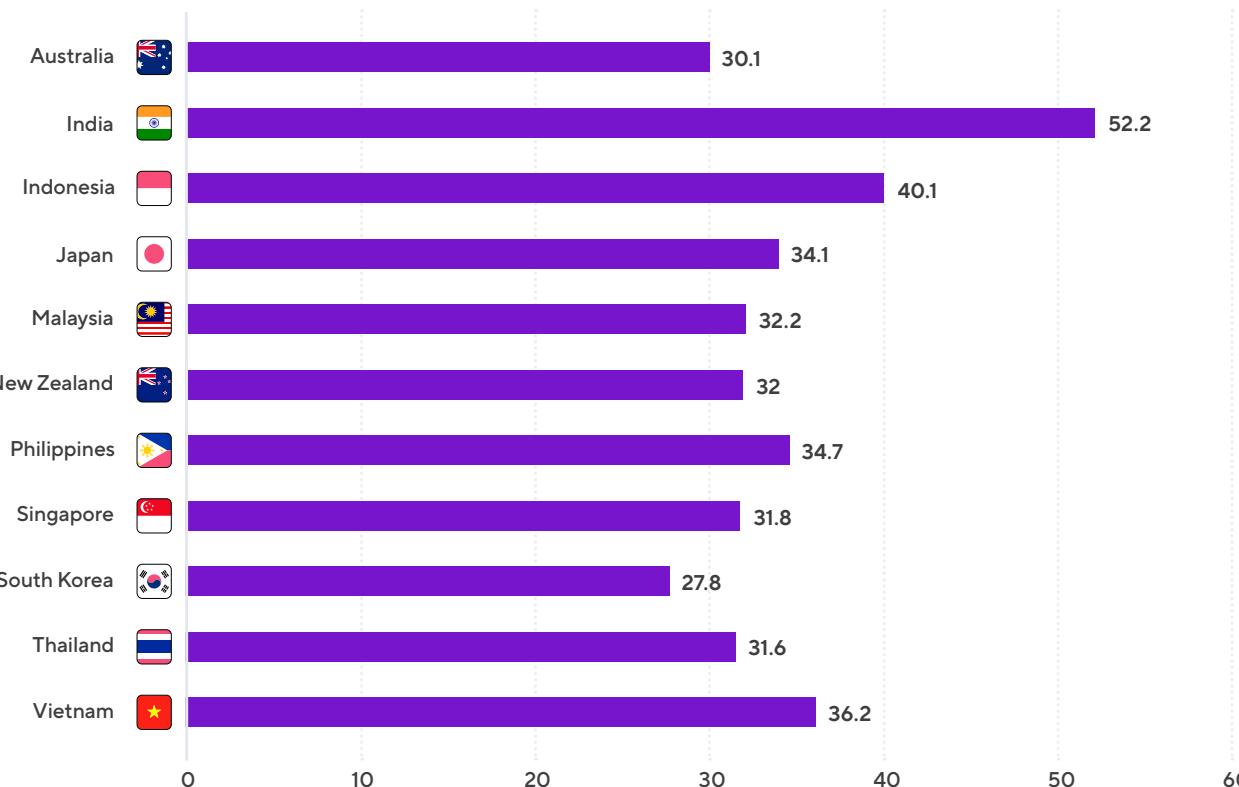
Top gaming app subvertical Growth Scores by country 2025 (APAC)

Country	Subvertical	Growth Score
Australia	Board	35.5
India	RPG	80
Indonesia	Music	54.2
Japan	Swap	45.4
Malaysia	Trivia	53.6
New Zealand	Puzzle	35.3
Philippines	Music	47.4
Singapore	Strategy	35.4
South Korea	Card	37.2
Thailand	Music	37.4
Vietnam	Word	54.1

APAC remains the world's largest mobile gaming market, projected to generate [\\$66.7 billion in revenue in 2025](#). Growth is driven by a large and youthful population, the rise of esports, and hybrid monetization models that lower barriers to entry. Beneath this momentum, however, the dynamics diverge sharply between markets.

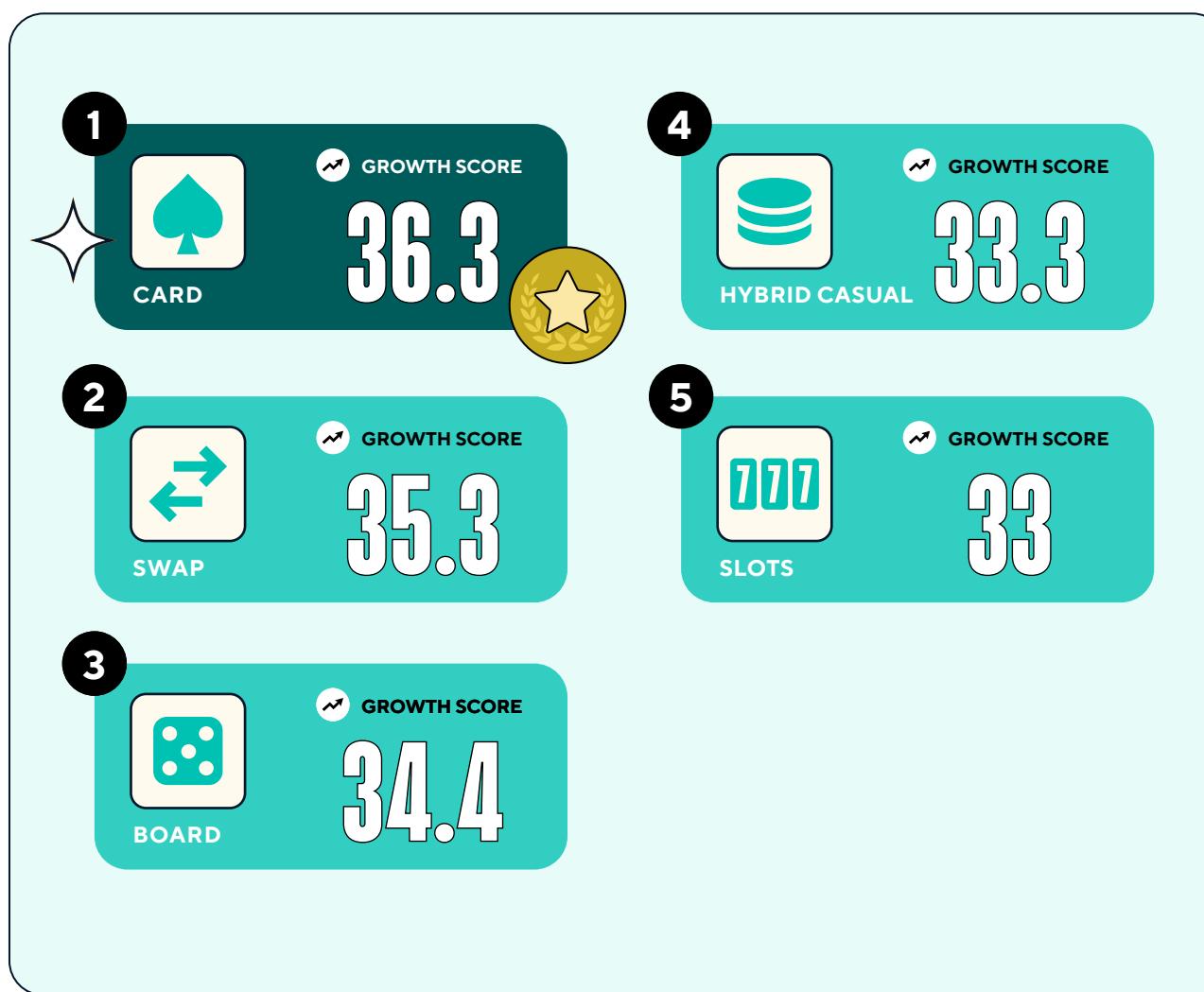
India claims the top position with a Growth Score of 52.2, supported by its base of more than [650 million mobile gamers](#) and low acquisition costs (just \$0.03 in H1 2025), making an extremely powerful growth space in the region. Indonesia (40.1) and Vietnam (36.2) are also top performers, with Indonesia's market forecast to reach [\\$555 million in 2025](#) and [Vietnam's \\$454 million](#)—evidence of how smaller markets are scaling rapidly.

Gaming app Growth Scores by country 2025 (APAC)



Europe Growth Scores

Top 5 gaming subvertical Growth Scores 2025 (Europe)



Top gaming app subvertical Growth Scores by country 2025 (Europe)

Country	Subvertical	Growth Score
Austria	Board	39.3
Belgium	Racing	37.8
Denmark	Board	37.4
Finland	Puzzle	36.6
France	Card	35.8
Germany	Swap	36.9
Ireland	Arcade	46.4
Italy	Card	37.2
Netherlands	Music	38.3
Norway	Action	39.1
Spain	Card	36.7
Switzerland	Card	37.4
U.K.	Swap	34.6

Europe's mobile gaming sector was valued at [\\$25.2 billion in 2024](#) and is projected to nearly quadruple to \$99 billion by 2033. Beneath this expansion, Growth Scores reveal sharp contrasts across the continent. Nordic markets such as Finland (33.3), Denmark (32.7), and Norway (33.1) rank highest, while Italy (31.7), Austria (31.9), Switzerland (31.1), and Spain (30.6) also post solid results.

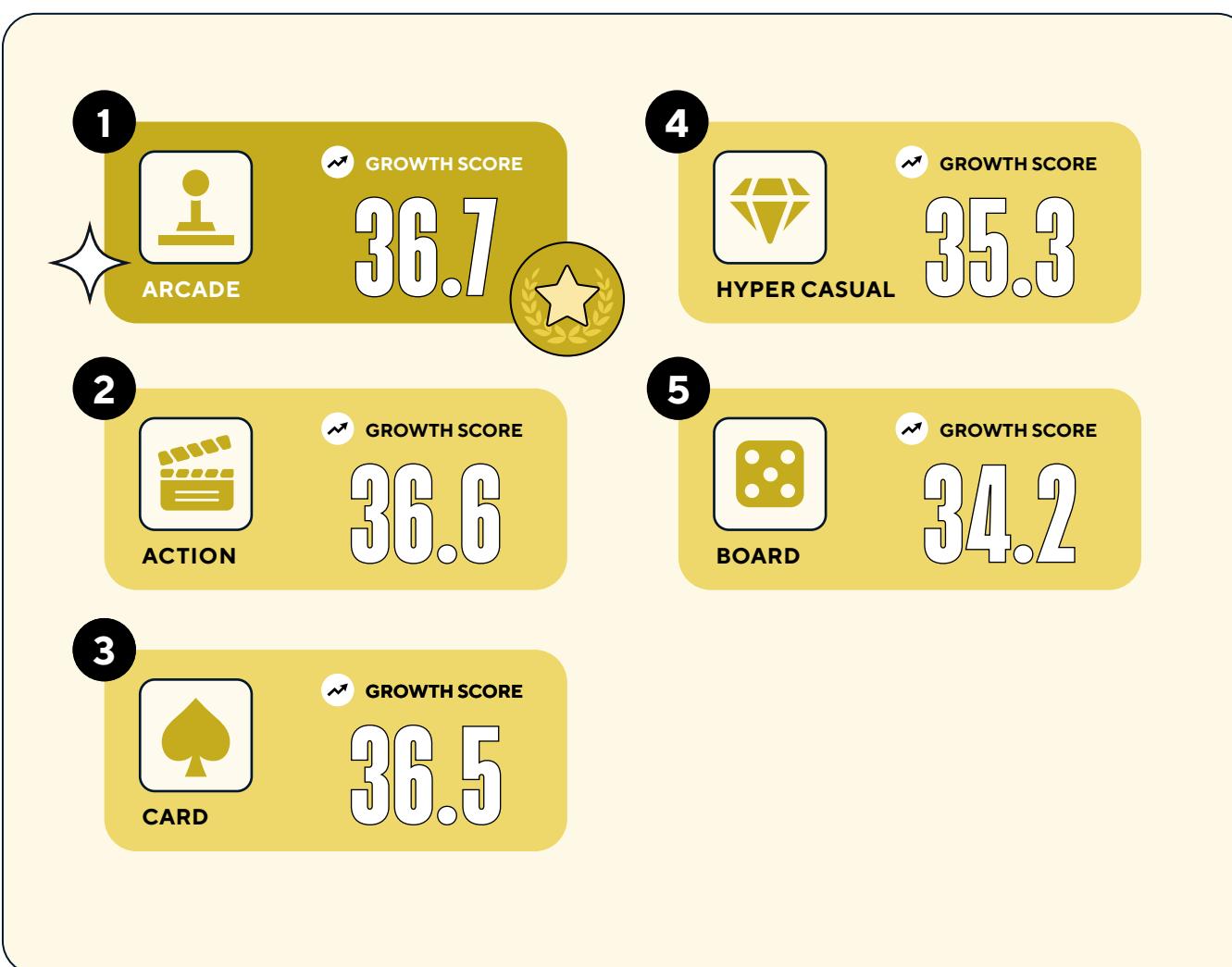
However, larger markets like the U.K. (29.2) and Belgium (29.7) trail behind, showing that scale alone does not guarantee stronger performance. This divide highlights a key dynamic in Europe: some markets deliver a lower volume of higher-value users, while others require greater focus on retention strategies and ARPU optimization to sustain growth.

Gaming app Growth Scores by country 2025 (Europe)



LATAM Growth Scores

Top 5 gaming subvertical Growth Scores 2023 (LATAM)



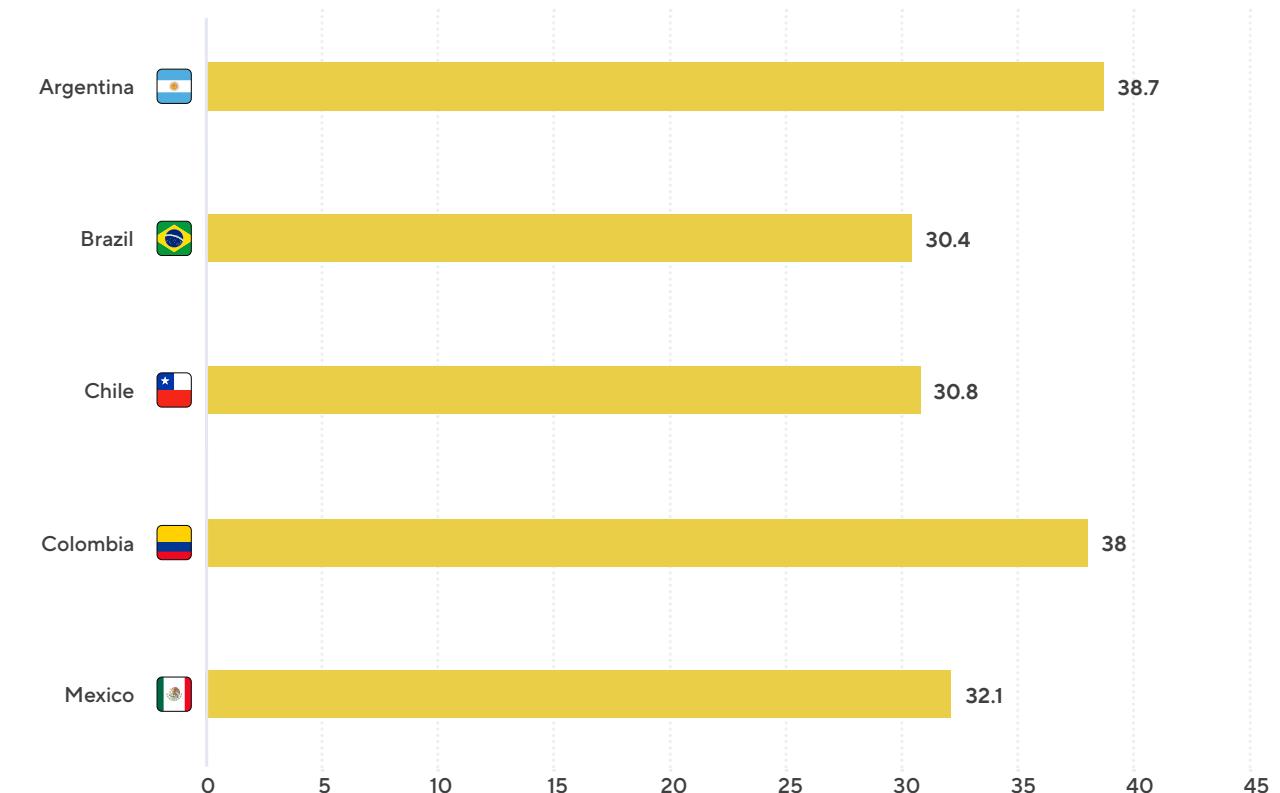
Top gaming app subvertical Growth Scores by country 2025 (LATAM)

Country	Subvertical	Growth Score
Argentina	Racing	46.2
Brazil	Arcade	36.8
Chile	Trivia	52.7
Colombia	Trivia	57.1
Mexico	Arcade	36.7



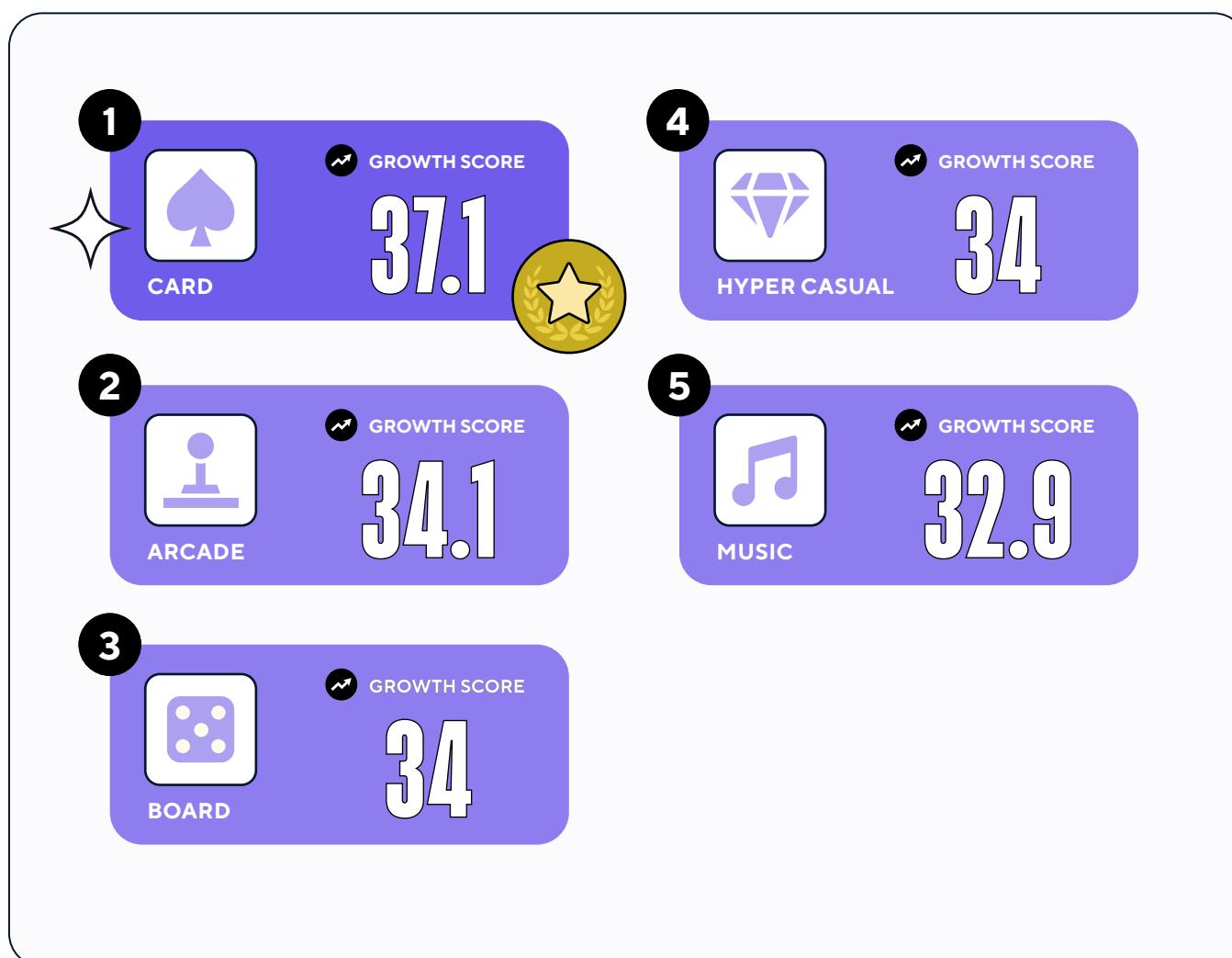
In 2025, LATAM's mobile gaming market is set to generate [\\$2.1 billion in revenue](#). Growth Scores reveal clear leaders: Argentina ranks highest at 38.7, just ahead of Colombia at 38, and followed by Mexico (32.1), Chile (30.8), and Brazil (30.4).

Gaming app Growth Scores by country 2025 (Europe)



MENAT Growth Scores

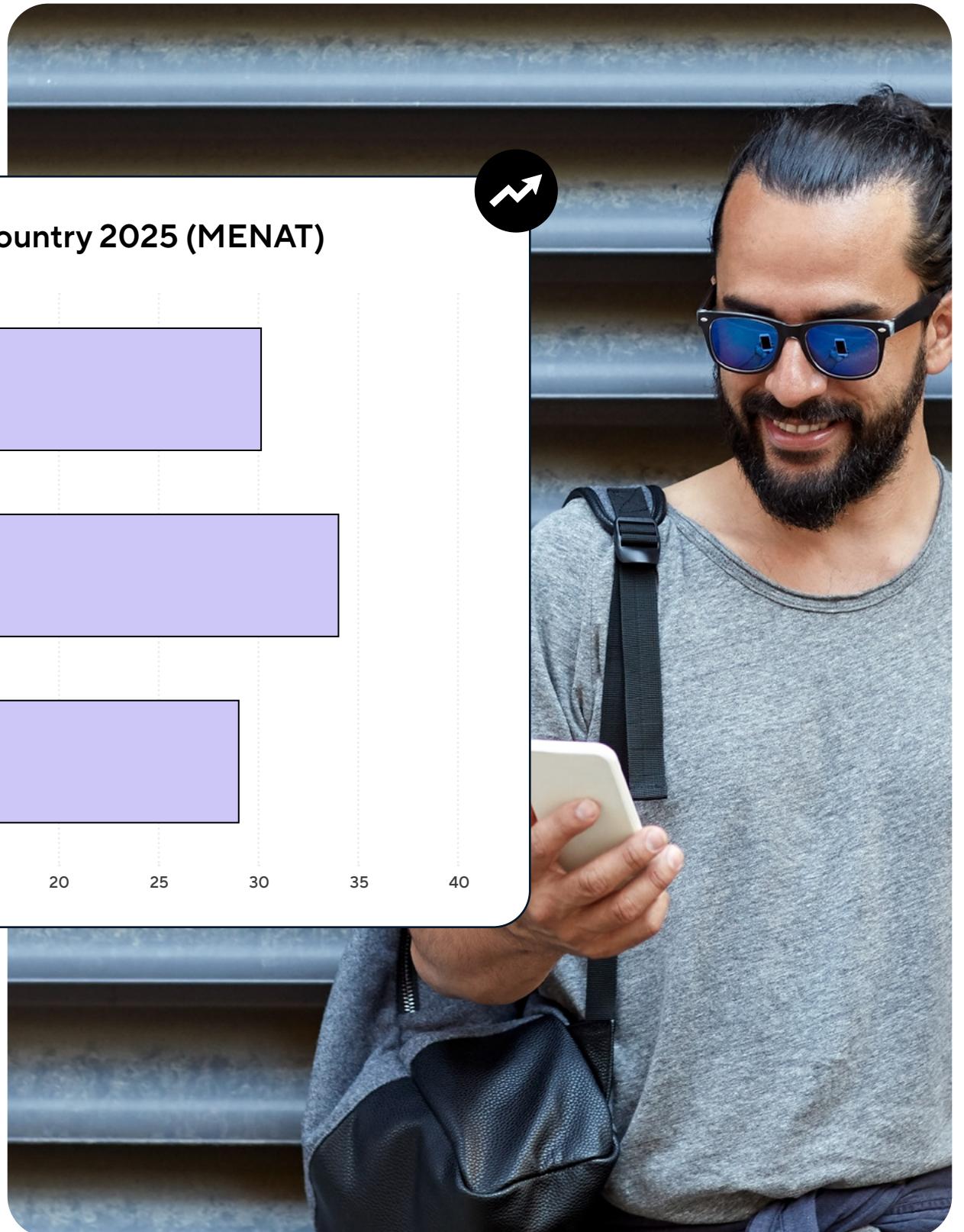
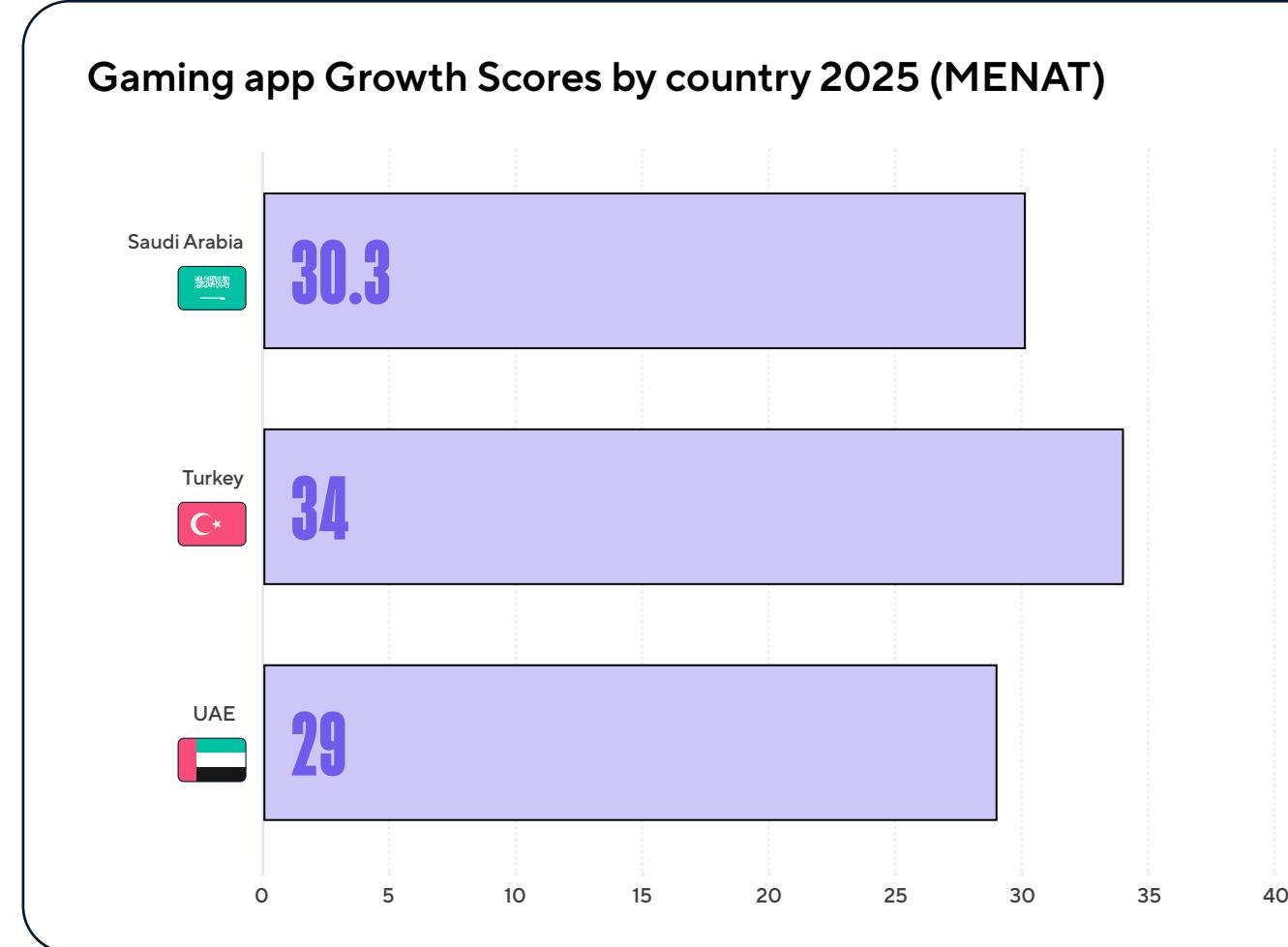
Top 5 gaming subvertical Growth Scores 2025 (MENAT)



Top gaming app subvertical Growth Scores by country 2025 (MENAT)

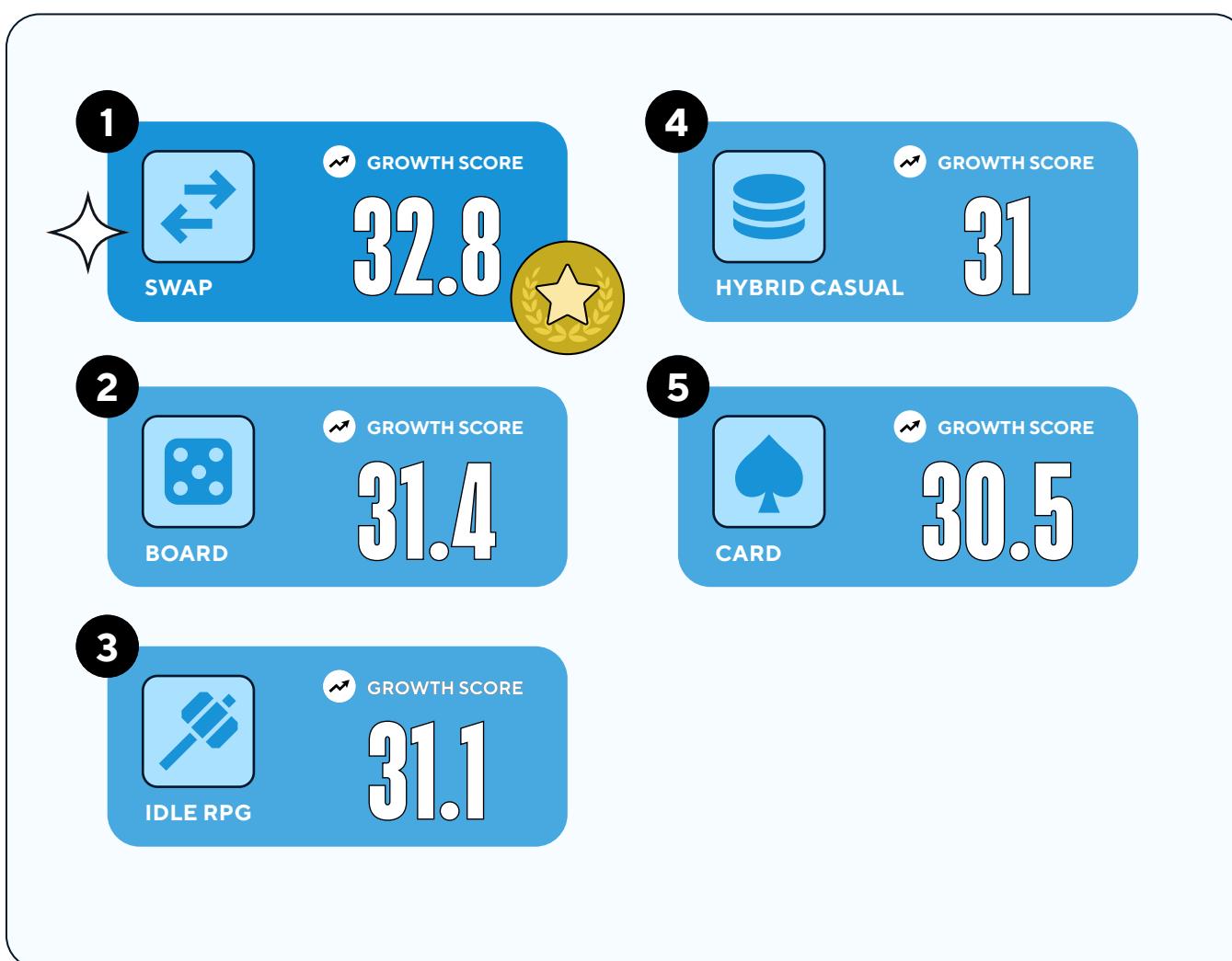
Country	Subvertical	Growth Score
Saudi Arabia	Card	40.5
Türkiye	Arcade	38.4
UAE	Sport games	36.5

Türkiye holds the highest Growth Score at 34, supported by a strong developer ecosystem and its growing role as an exporter of gaming talent. Mobile gaming revenue in Türkiye is forecast to reach [\\$427 million in 2025](#), nearly half of the country's total gaming revenue. Saudi Arabia follows with a score of 30.3, while UAE records 29.



North America Growth Scores

Top 5 gaming subvertical Growth Scores 2023 (North America)

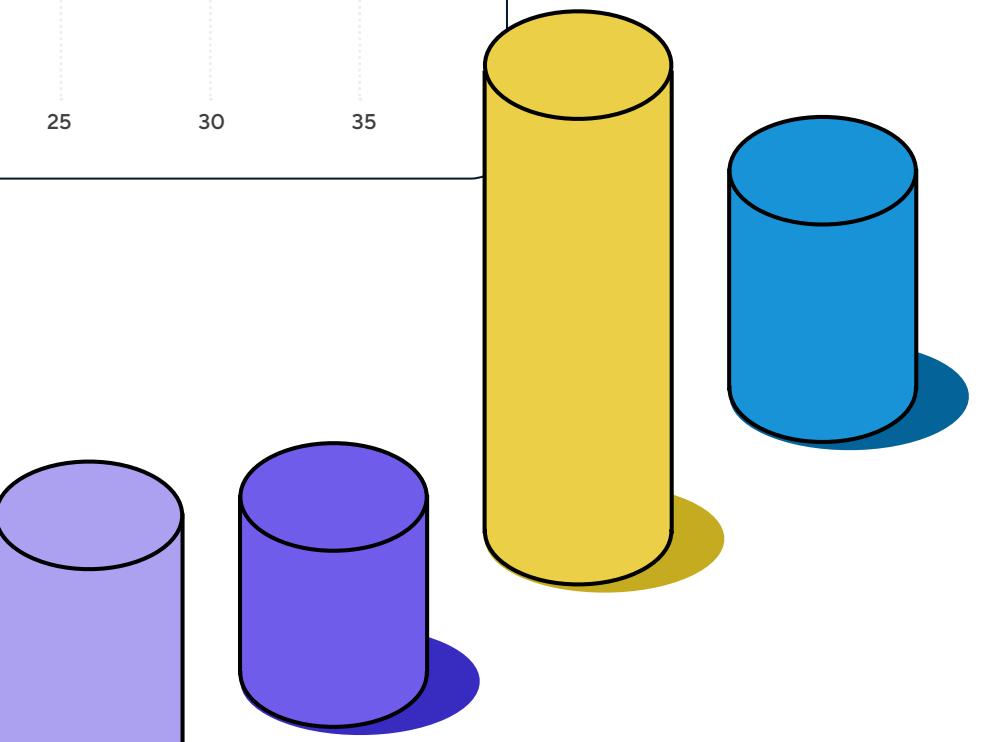
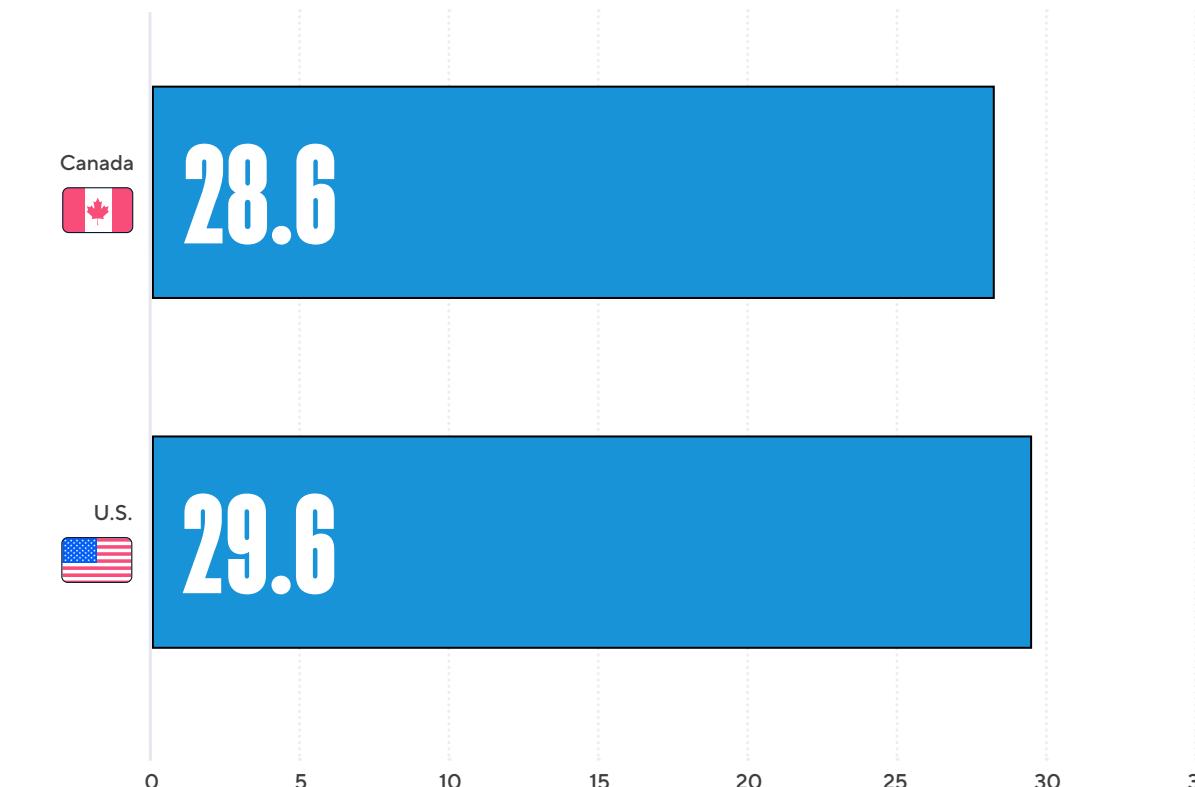


Top gaming app subvertical Growth Scores by country 2025
(North America)

Country	Subvertical	Growth Score
Canada	Swap	35.4
U.S.	Swap	32.8

In North America, mobile gaming Growth Scores are close, with Canada at 29.6 and the U.S. at 28.6. In both markets, future expansion will need to rely on a strategic combination of new installs, monetization optimization, and retention strategies (as opposed to pure, high-volume UA).

Gaming app Growth Scores by country 2025 (North America)



CONCLUSION

Where mobile growth goes next

Winning in today's mobile economy means moving beyond volume and onto value, balancing acquisition efficiency with long-term user engagement. By distilling these dynamics into a single benchmark, the Adjust Growth Score provides UA managers and app developers the clarity to prioritize investments and uncover markets that can serve as the next place to scale, and deliver lasting value.

The 2025 results show how this balance plays out globally. INSEA leads with scale and cost efficiency, powered by India, Indonesia, and Vietnam, while Japan and Europe's Nordics highlight the long-term value of engagement and retention. LATAM benefits from rising connectivity and cost-efficient acquisition, MENAT reflects investment and policy-driven expansion, and North

America demonstrates that in saturated markets, ARPU optimization and lifecycle engagement are important pillars of success.

As competition intensifies and privacy frameworks evolve, the ability to act on the right data will determine good results from great ones. Adjust supports and empowers clients to make the most of these shifts, with privacy-ready attribution and measurement, AI-powered analytics and optimization, multi-platform deep linking, and the brand-new Adjust Growth Copilot—an AI, natural language assistant for instant, contextual answers to business and data questions. Together, these solutions give marketers the confidence to act quickly and capture sustainable growth across the full user journey.

We'll continue to track how Growth Scores evolve across regions and verticals in the year ahead. For a deeper dive into installs, engagement, and the user behavior shaping the ecosystem, get your copy of [Mobile app trends: 2025 edition](#), and stay tuned for fresh insights in our future reports.





ABOUT ADJUST

Adjust, an AppLovin (NASDAQ: APP) company, is trusted by marketers around the world to measure and grow their apps across platforms.

Adjust works with companies at every stage of the app marketing journey, from fast-growing digital brands to brick-and-mortar companies launching their first apps. Adjust's powerful measurement and AI-powered analytics solutions provide visibility and insights, while deep linking and engagement solutions help to drive ROI.

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