











Q1 2025 Digital Market Index

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



Sensor Tower | Our Customers

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



Next level insights.

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Digital Advertising Market

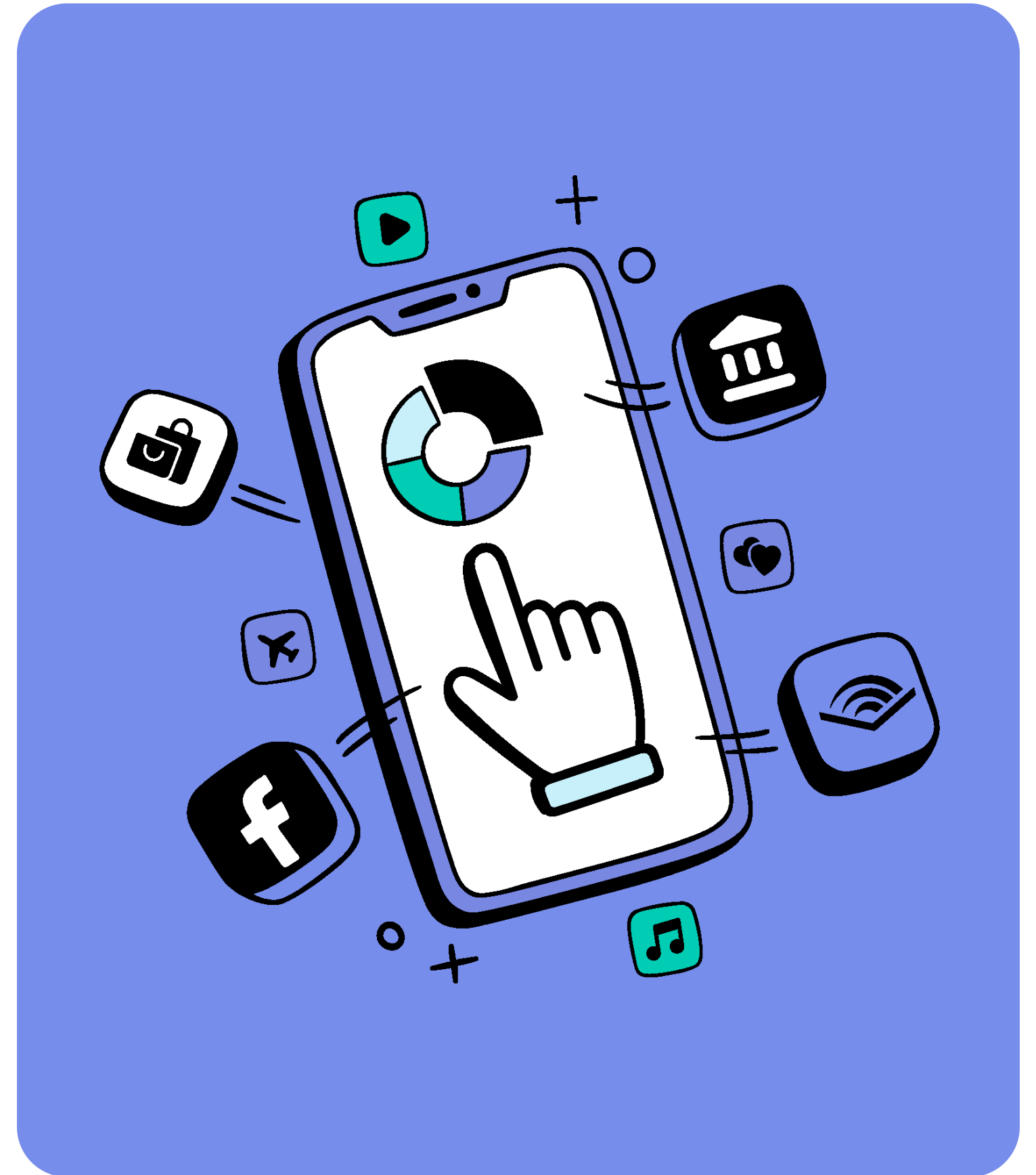
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Q1 2025: **Mobile Market Overview**

About this Data:

Mobile App Methodology

- Sensor Tower's Insights team compiled the download and in-app purchase (IAP) revenue 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 IAP revenue estimates for January 1, 2024 through March 31, 2025.
- 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 IAP revenue estimates represent downloads and revenue from the Google Play Store only. Sensor Tower does not provide download estimates for third-party Android stores.
- IAP revenue estimates are gross — inclusive of any percent taken by the app stores.



IAP Revenue Hits \$40 Billion Milestone

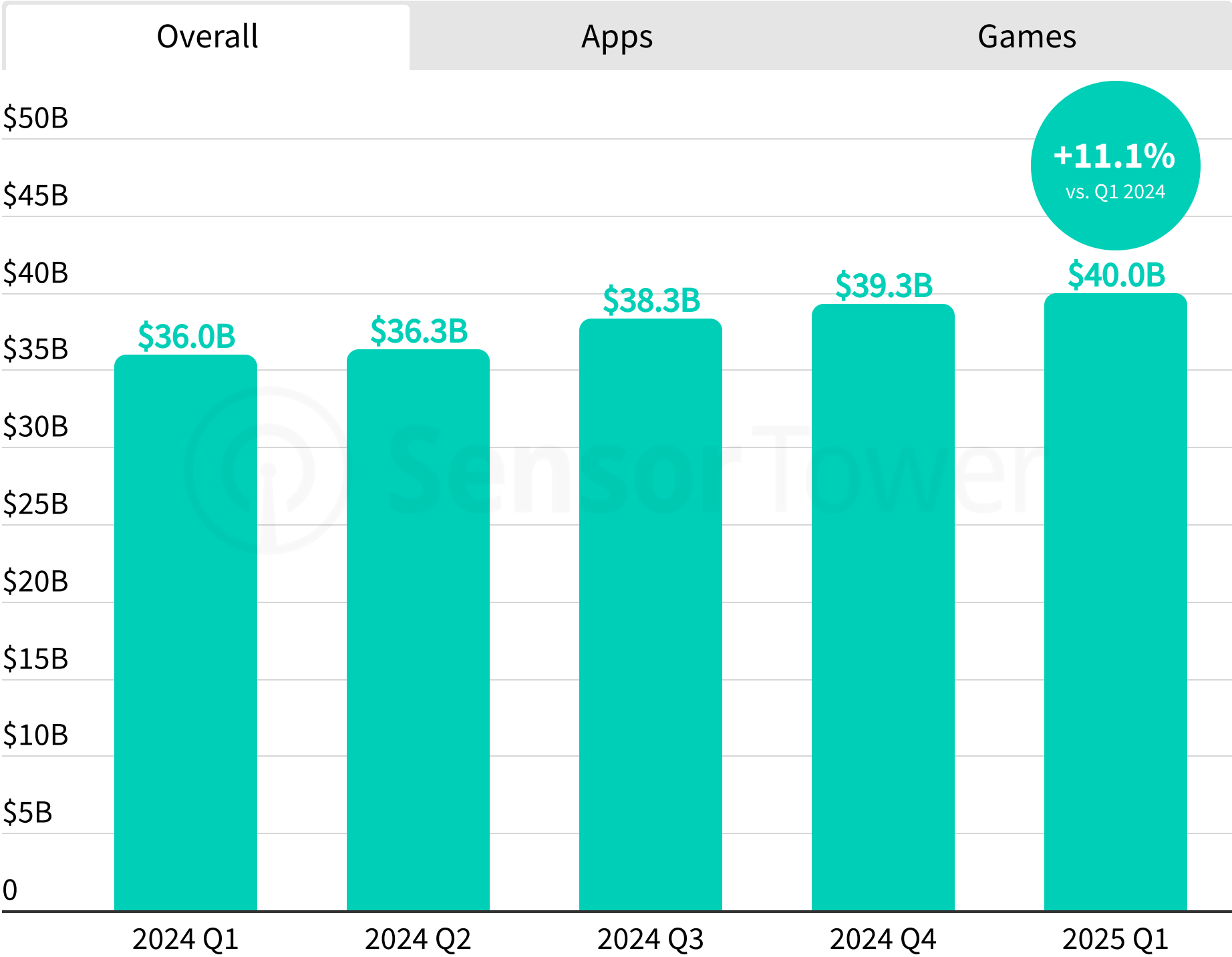
Quarterly global in-app purchase (IAP) revenue across iOS and Google Play climbed 11% year-over-year (YoY) to reach \$40 billion in Q1 2025, a new all-time high for a quarter. This was the sixth straight quarter that IAP revenue climbed by at least 10% YoY as mobile continued to take a larger share of consumers' wallets. Mobile IAP revenue has doubled since Q1 2019 when consumers spent \$20 billion.

Apps continued to drive the majority of this growth, reaching \$19.4 billion (+24% YoY). App revenue is on track to overtake game revenue before the end of this year. This is a truly remarkable shift over the past five years — in 2020, consumers spent 2.5X in mobile games than they did in apps.

Games still led non-games in terms of IAP revenue, though the gap is closing fast. Consumers spent \$20.6 billion on IAPs in games (+1% YoY), a slight slowdown from the 2 to 5% YoY growth seen in recent quarters.

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

Quarterly Worldwide In-App Purchase Revenue Between Q1 2024 - Q1 2025
iOS and Google Play



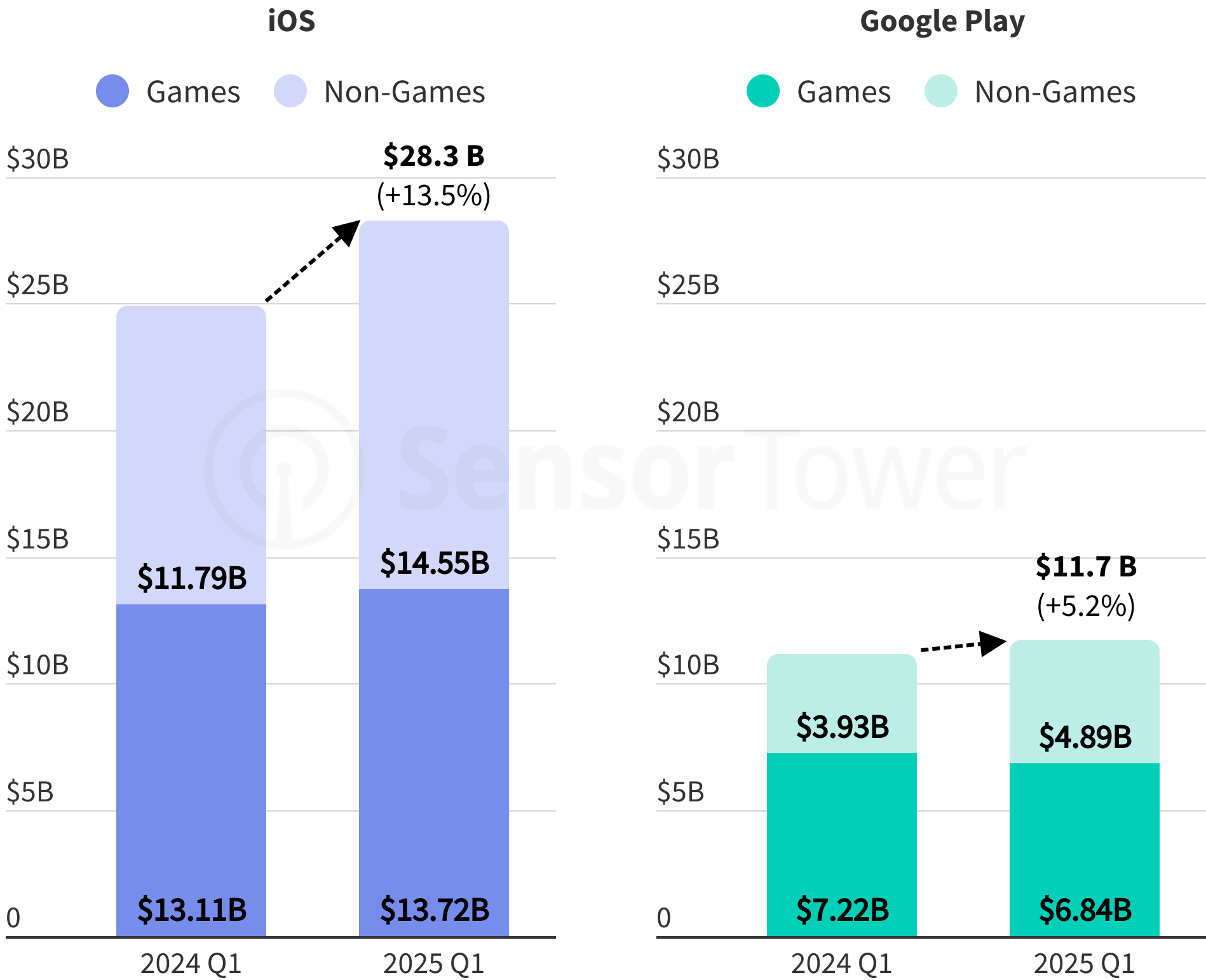
iOS Continued to Be the Leading Platform for Mobile Monetization

iOS not only held its spot as the top platform for IAP monetization, it also gained market share over Google Play. In Q1 2025, iOS accounted for more than \$7 out of every \$10 spent on IAPs between the two leading app stores. iOS IAP revenue climbed 13.5% YoY including positive growth from games and non-games.

Google Play also had positive revenue growth in Q1 2025, and the platform actually provided similar growth opportunities for non-games as iOS. Non-game IAP revenue on Google Play climbed 24% (compared to 23% YoY growth on iOS). Games, meanwhile, were a drag on Google Play revenue, declining 5% YoY. It's worth noting that Google Play is not available in China (the second largest market on iOS).

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

Worldwide In-App Purchase Revenue in Q1 2025



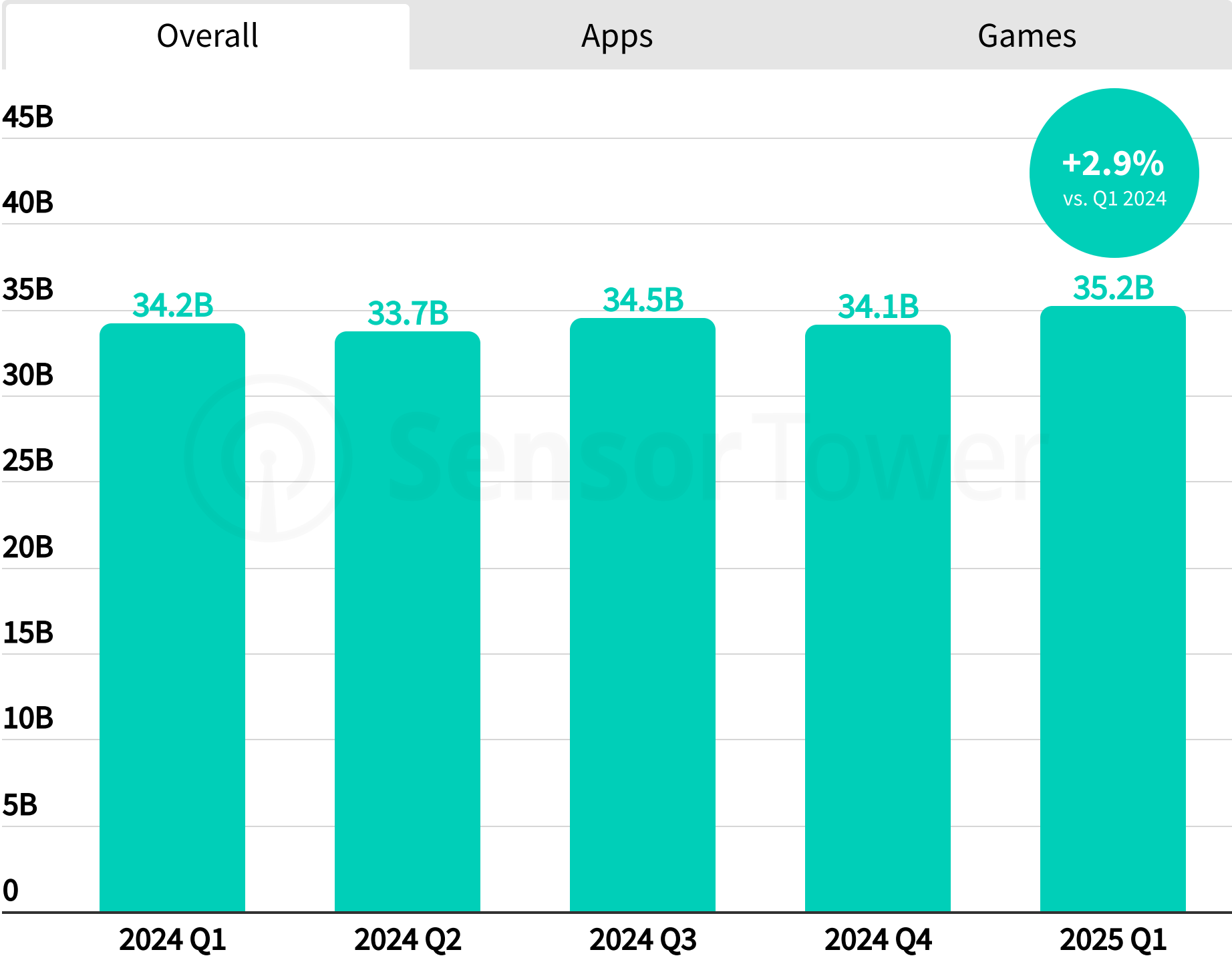
Mobile Apps Have Best Quarter By Downloads in Two Years

App downloads surpassed 35 billion for the first time in a quarter since Q1 2023 as the mobile market finds equilibrium. Mobile developers are finding new ways to reach users amid shifting consumer preferences and privacy regulations. Generative AI is also providing a nice boost as consumers discover their new favorites on mobile. Overall, non-game app downloads climbed nearly 6% YoY while mobile game downloads fell by 2.5% YoY.

Despite falling from their peak at 37.5 billion in Q2 2020, downloads were still well above pre-pandemic levels. App downloads were up 25% compared to Q1 2019.

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

Quarterly Worldwide App Downloads Between Q1 2024 - Q1 2025
iOS and Google Play



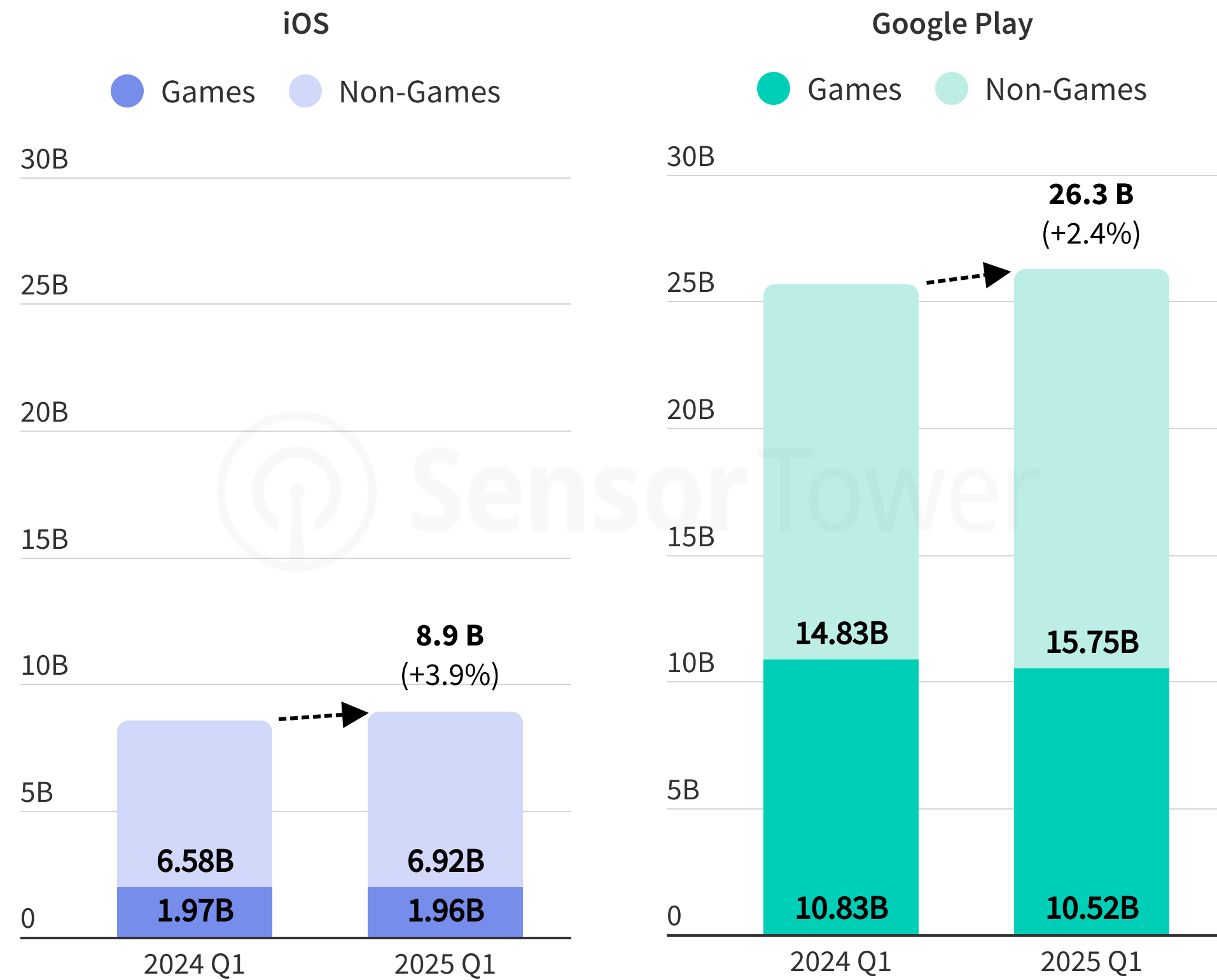
Google Play is the Top Platform for Downloads as Both Platforms Saw Modest Growth in Q1 2025

While iOS accounted for roughly 70% of IAP revenue between the two platforms in Q1 2025, Google Play took 75% of downloads. Both iOS and Google Play achieved positive growth to start 2025, with iOS download growth slightly outpacing Google Play's.

Non-games drove the positive momentum in Q1 2025 as generative AI and short drama fueled growth. Mobile game downloads declined slightly on both platforms YoY.

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

Worldwide App Downloads in Q1 2025



Q1 2025: **Top Markets**

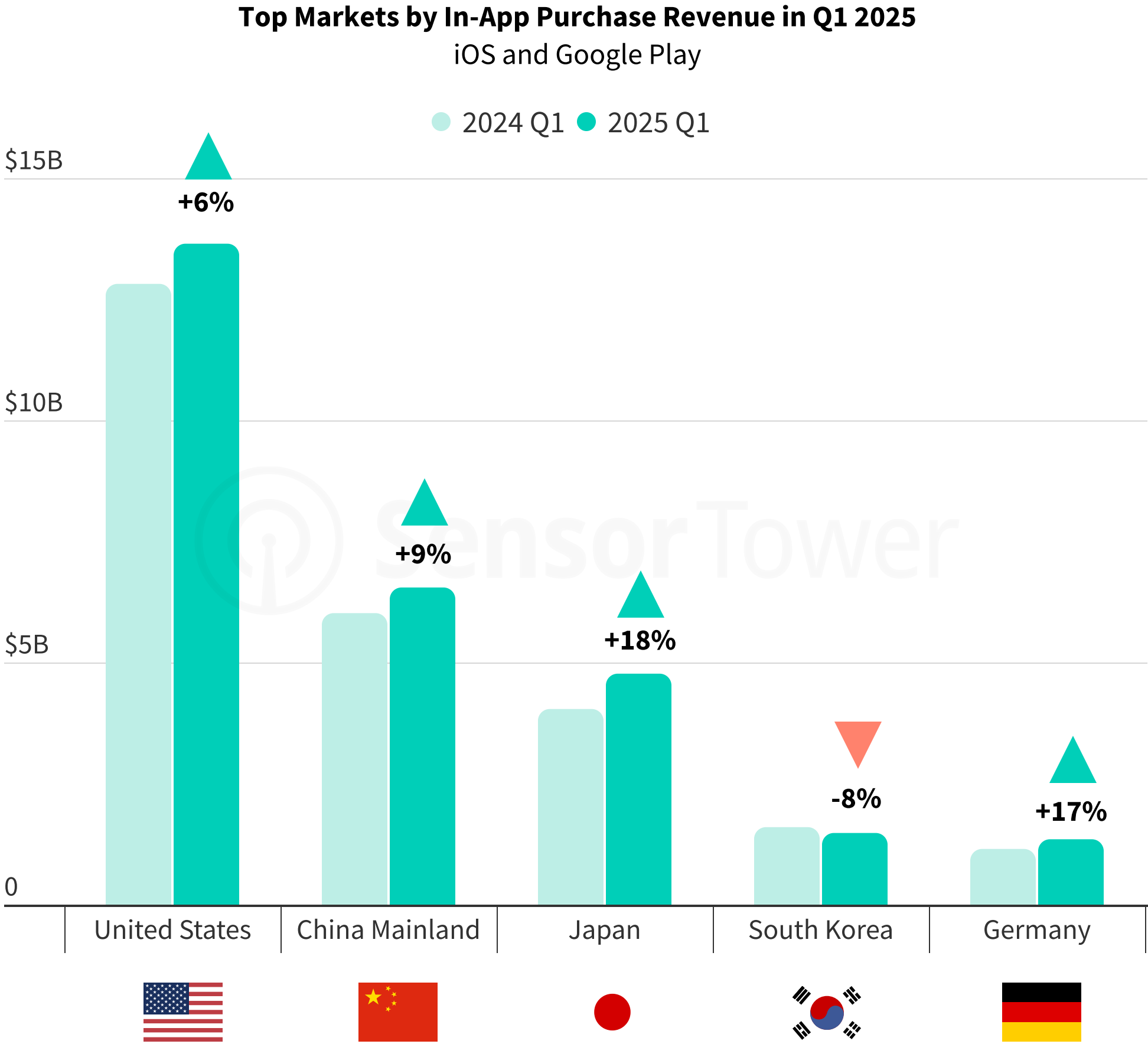
Japan's Market Came Roaring Back After Several Slow Years

The United States remained the top mobile market for apps monetizing with in-app purchases with \$13.65 billion in IAP revenue. The US accounted for more than a third of global IAP revenue across iOS and Google Play while taking less than 10% of downloads.

Japan had the fastest IAP revenue growth among the top markets (+18% YoY). This followed years of decline between the start of 2021 through early 2024 as Japan's mobile gaming market contracted. The return of positive growth points to how app publishers are learning to navigate privacy regulations and shifting consumer preferences, plus an improving economy.

Germany led the rapid-rising European region with \$1.35 billion in IAP revenue (+17%). Europe as a region also achieved 17% YoY growth, far outpacing other regions like North America and Asia.

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



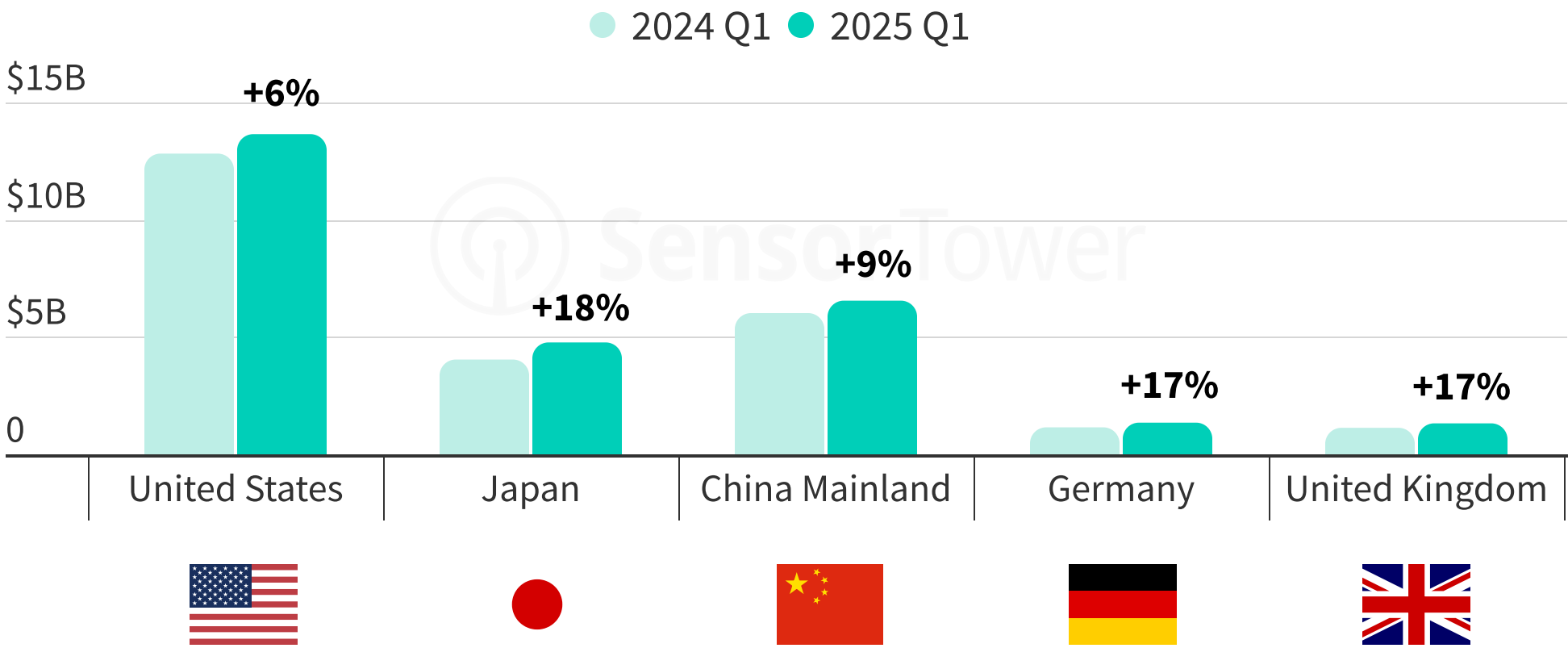
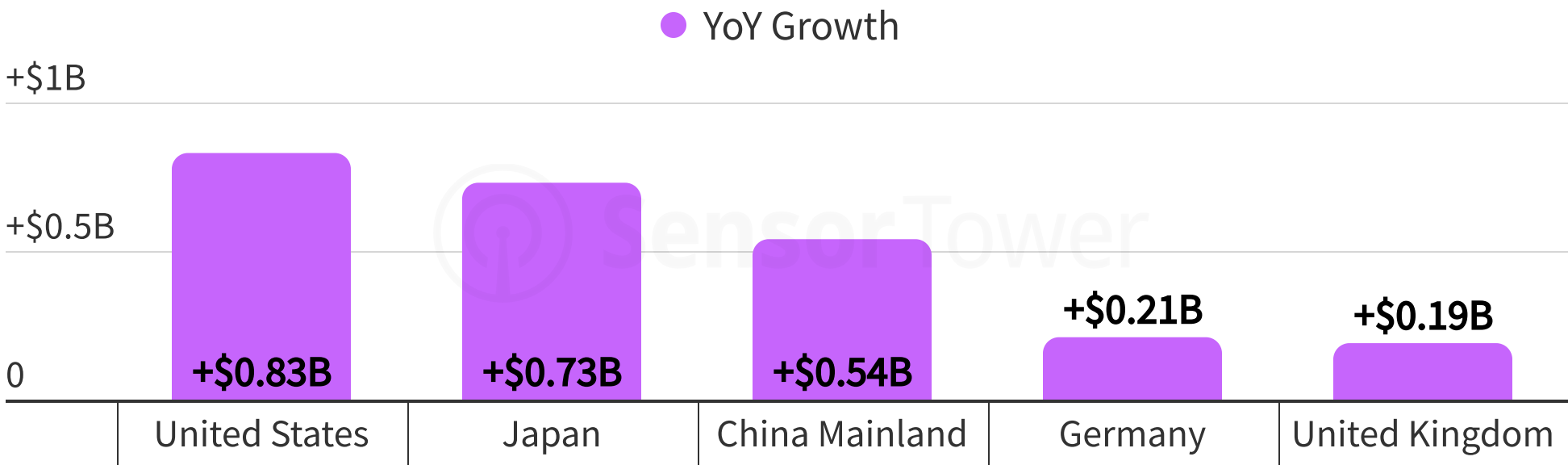
The Big 3 Mobile Markets Added \$2 Billion in IAP Revenue YoY

The United States, Japan, and China Mainland combined to add more than \$2 billion in additional IAP revenue in Q1 2025 vs. Q1 2024. These three markets alone accounted for roughly half of the growth globally over this period.

Germany and the United Kingdom rounded out the top five markets by YoY growth. Both are representative of the high growth rates in western Europe (the 17% YoY growth in the markets outpaced the 11% rate globally).

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

Top Breakout Markets by Year-over-Year In-App Purchase Revenue Growth in Q1 2025
iOS and Google Play



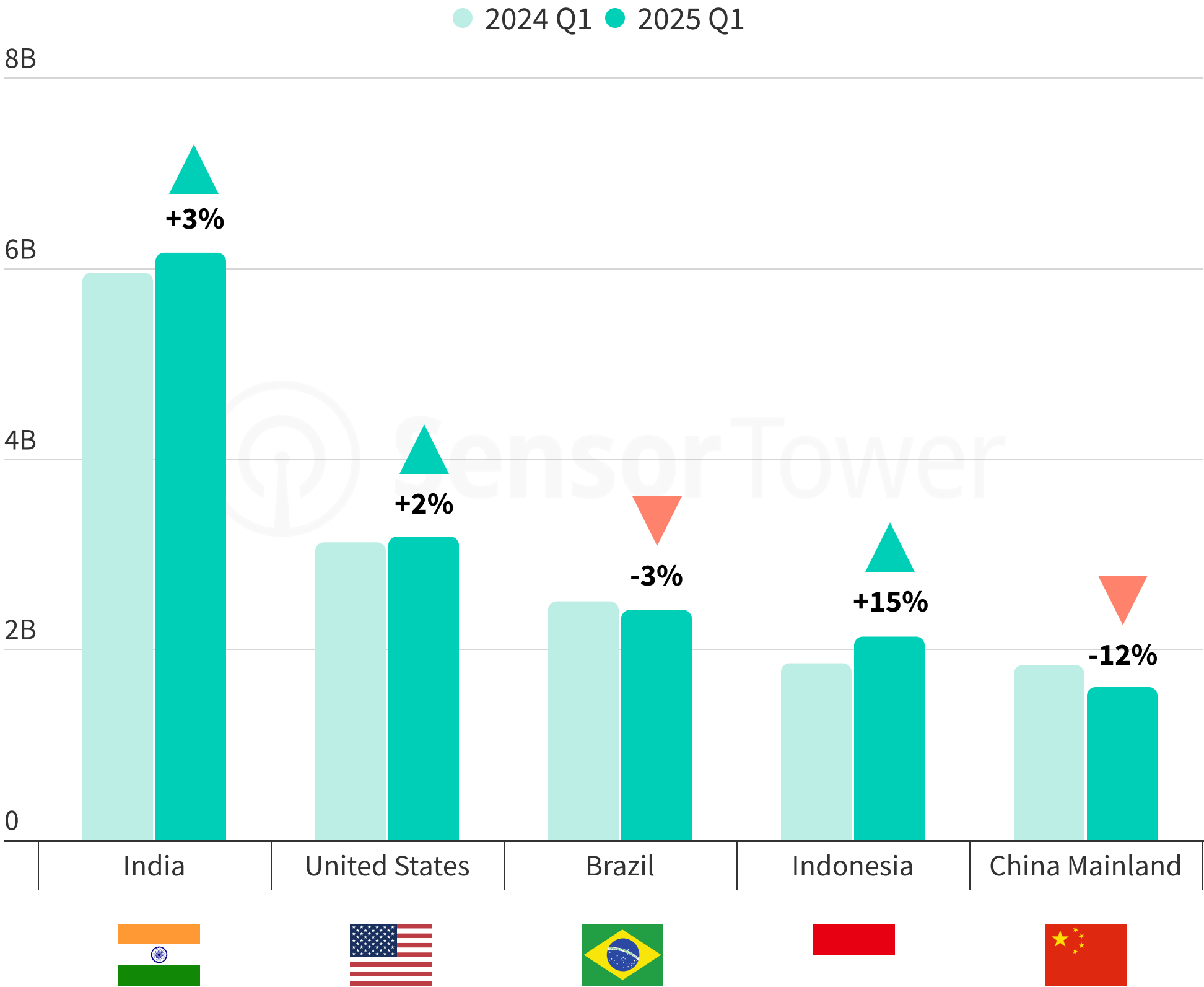
Most Top Markets Have Achieved Stable Downloads by Early 2025

Mobile adoption has held fairly steady in the top three markets. India and the US achieved slightly positive growth as generative AI apps provided a boost to the markets. Brazil's downloads declined slightly.

Indonesia has been a rare market to sustain positive momentum even following the COVID-19 pandemic. Over the past five years, Indonesia has moved up two spots to rank as the #4 market by downloads and is on track to overtake Brazil in the upcoming quarters.

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

Top Markets by App Downloads in Q1 2025
iOS and Google Play

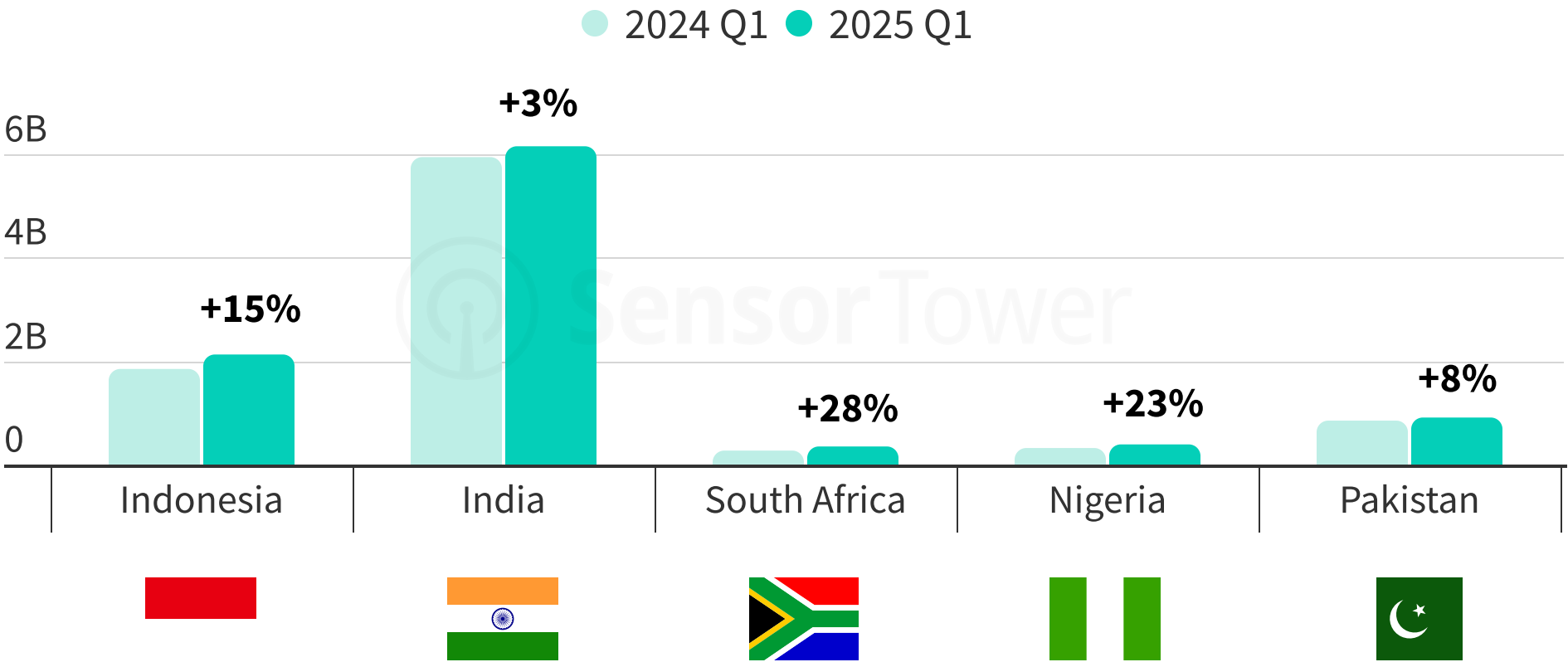
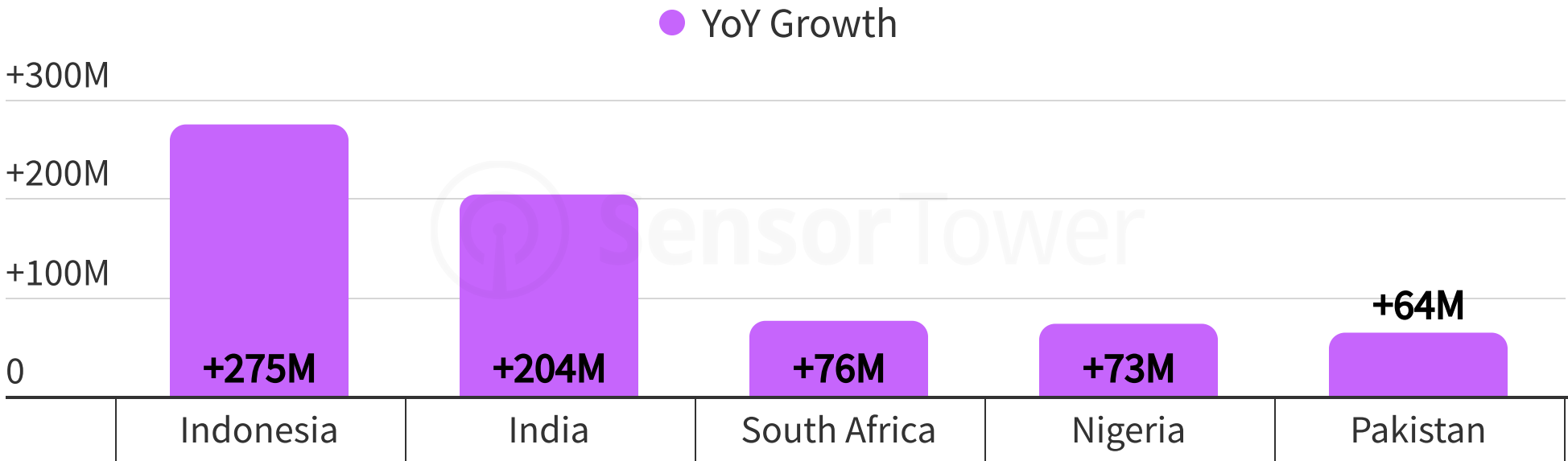


Look to Asia and Africa to Find New Users

Indonesia and India were the top markets by download growth. Some of the fastest growing categories in these markets included Photo & Video, Productivity, and Entertainment.

As a region, Africa achieved 11% YoY growth, far outpacing the global rate of +3%. South Africa and Nigeria surpassed even the regional rate with more than 20% YoY growth.

Top Breakout Markets by Year-over-Year Download Growth in Q1 2025
iOS and Google Play



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

Q1 2025: **Top Categories**

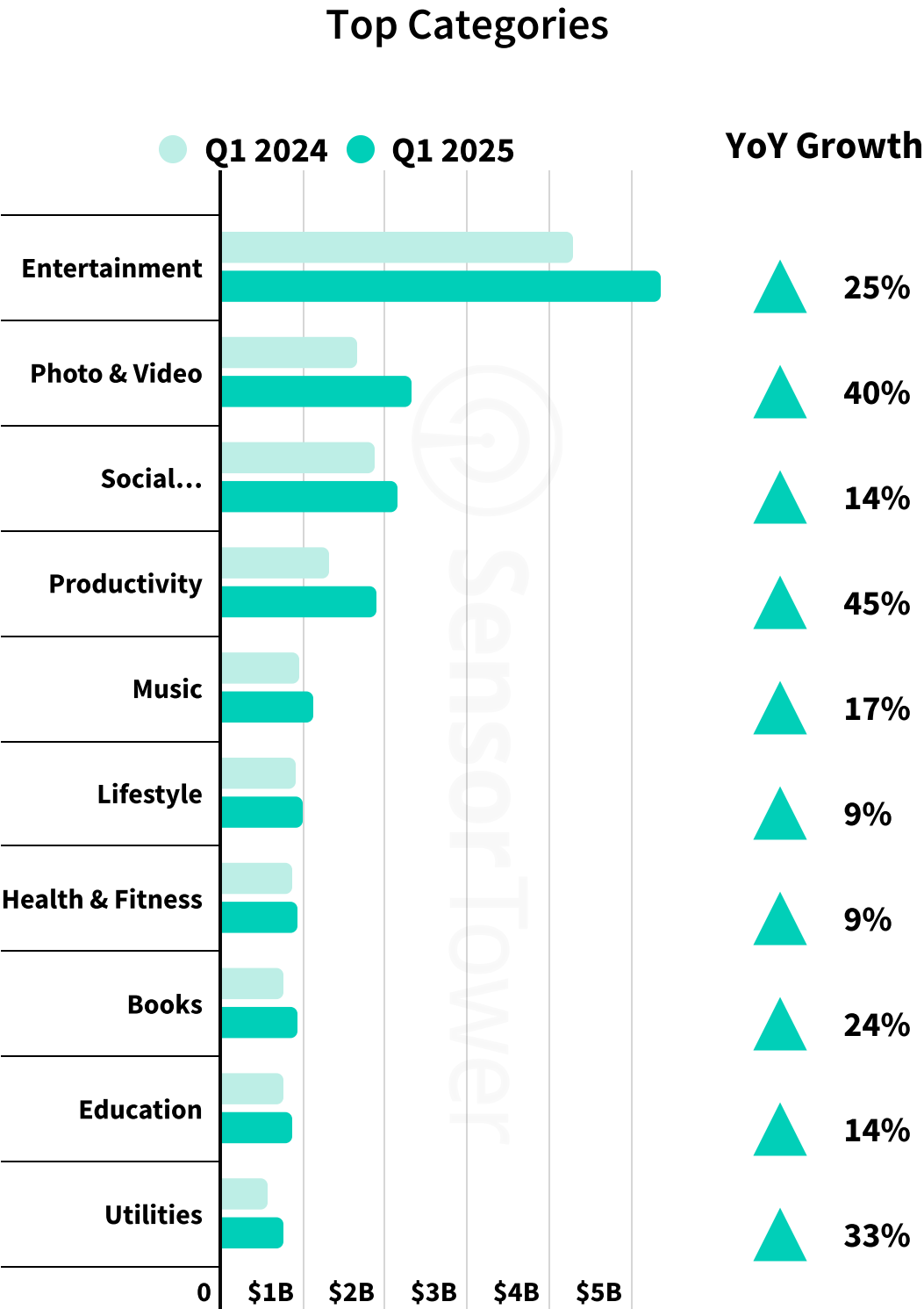
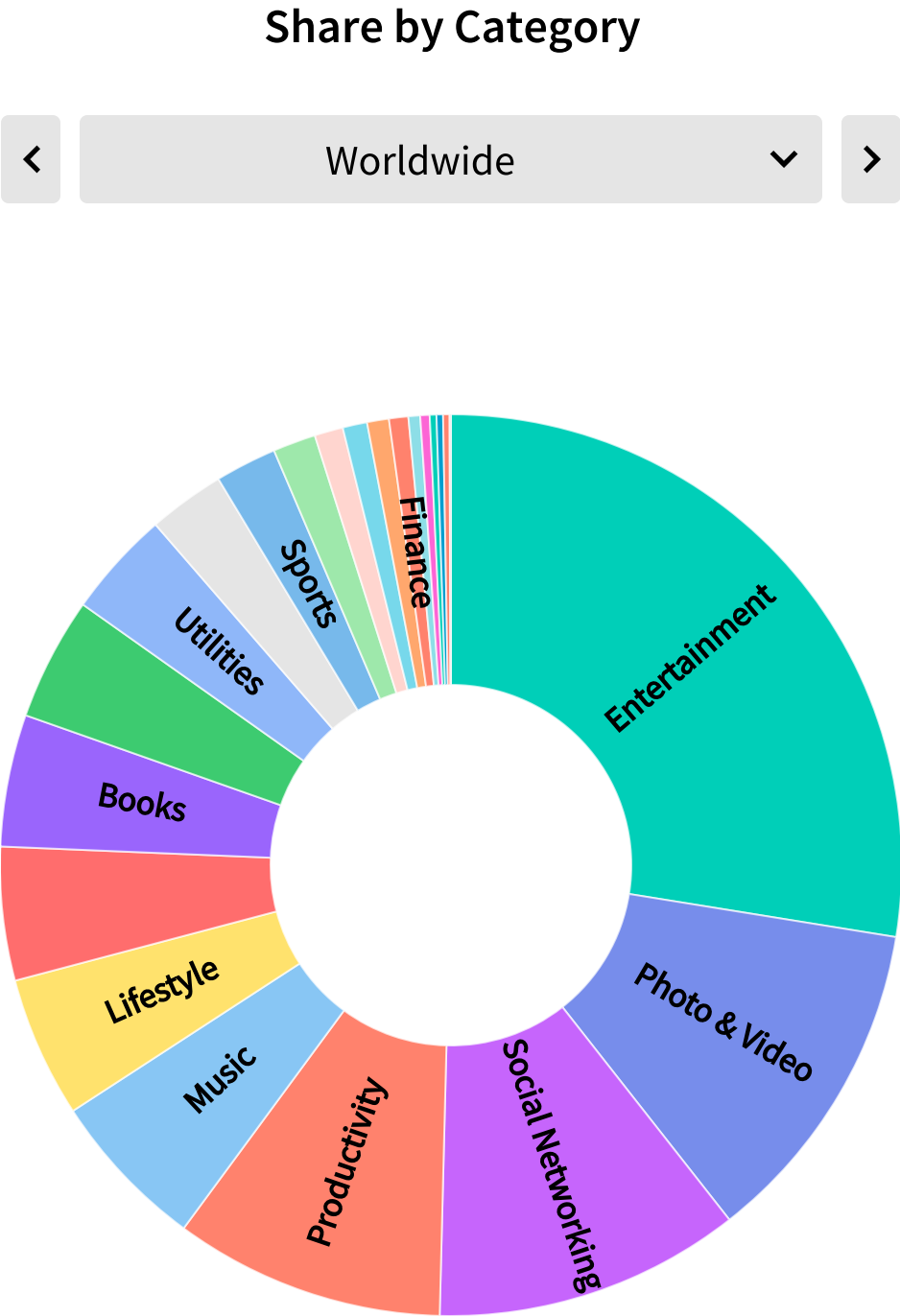
Eight of the Top 10 Categories Saw Revenue Climb by at Least 14% YoY

In-app purchase (IAP) revenue in non-games continued its rapid climb into 2025. Consumer demand for AI helped boost categories like Productivity and Photo & Video which achieved 45% and 40% YoY growth, respectively.

Entertainment led the way with more a quarter of the market. It also maintained strong growth from short video apps like TikTok, streaming apps like Max and Amazon Prime Video, and short drama apps like DramaBox and ReelShort.

Source: Sensor Tower
Note: iOS and Google Play combined. iOS only for China. Excludes third-party Android. Revenue is gross — inclusive of any percent taken by the app stores. Categories classified by the iOS App Store and Google Play categories for each app.

Top App Categories by In-App Purchase Revenue in Q1 2025
iOS and Google Play



AI Continued to Propel Download Growth Globally

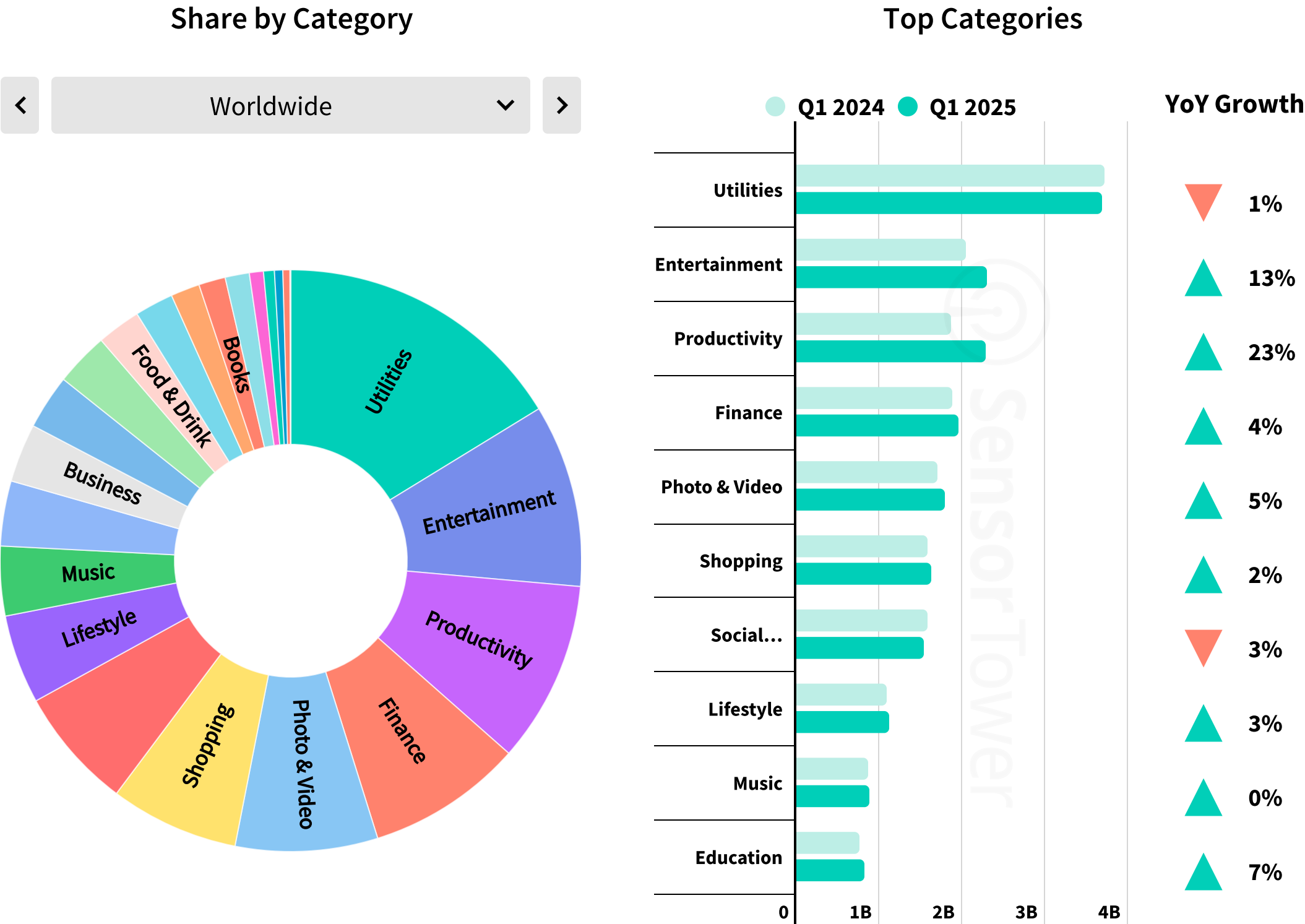
Productivity app downloads climbed 23% YoY in Q1 2025, largely due to the continued rise of generative AI. Top apps (excluding games) by download growth over the past four quarters (compared to the prior four quarters) included ChatGPT (#1 by growth), Google Gemini (#4), DeepSeek (#6), and Doubao (#8).

Entertainment was the only other category to achieve double-digit growth. The rapid rise in Short Drama apps explained this surge, with apps like DramaBox, ShortMax, and ReelShort gradually expanding their reach across the globe.

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 Q1 2025

iOS and Google Play



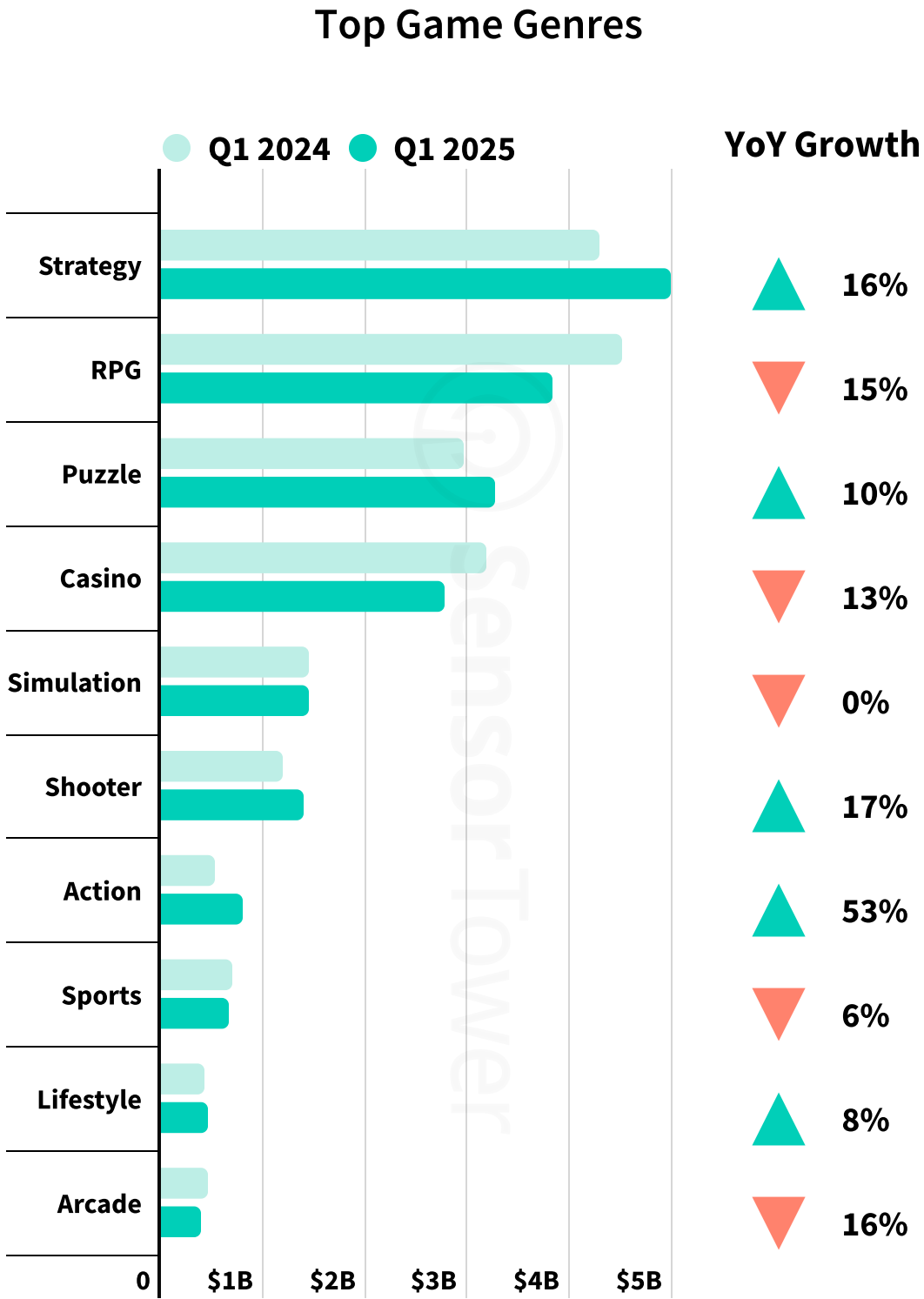
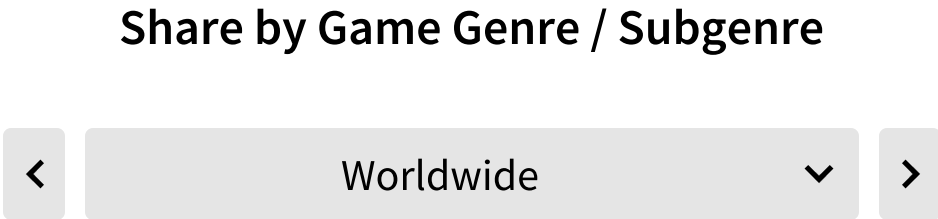
Strategy has Overtaken RPG as the Top Genre on Mobile

Strategy game IAP revenue approached \$5 billion in Q1 2025 as the genre continued to expand its lead over RPG for the top spot on mobile. Top Strategy games included long-established titles like Whiteout Survival and Honor of Kings, as well as a recent launch: Dark War Survival. Puzzle, Shooter, and Action games also had strong growth in Q1 2025.

Role-Playing Game (RPG) revenue declined again in Q1 2025, dragging down revenue in markets like Japan and South Korea. However, game developers are finding new ways to succeed in these markets that are traditionally dominated by local publishers. Strategy game revenue climbed 71% YoY in Japan, helping to offset the 13% decline from RPGs. Meanwhile, in South Korea, Strategy and Puzzle achieved 10% and 16% YoY growth, respectively, somewhat balancing out the 29% YoY drop off among RPGs.

Source: Sensor Tower
Note: iOS and Google Play combined. iOS only for China. Revenue is gross — inclusive of any percent taken by the app stores. Excludes third-party Android. Games classified by Sensor Tower's Game Taxonomy as of April 21, 2025.

Top Game Genres by In-App Purchase Revenue in Q1 2025
iOS and Google Play



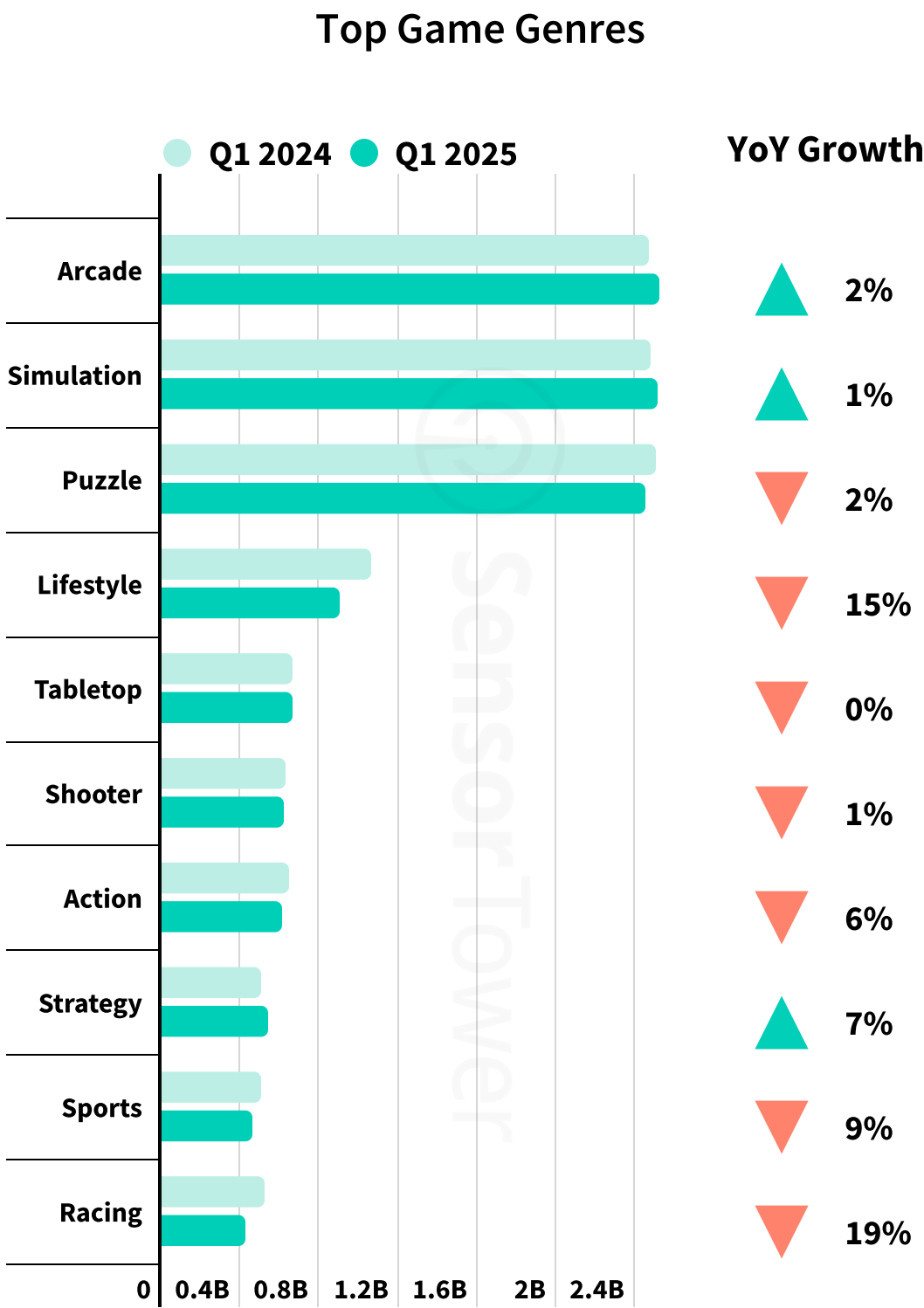
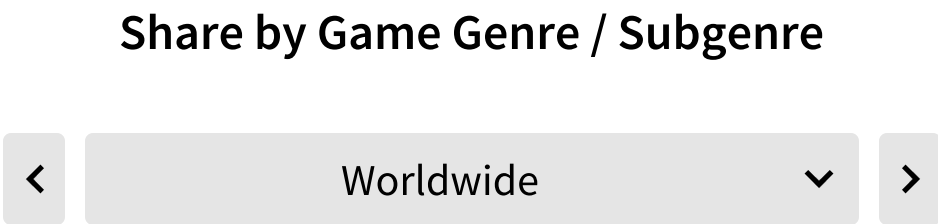
Three Genres Combined for 60% of Mobile Game Downloads in Q1 2025

Puzzle, Simulation, and Arcade each contributed more than 2.4 billion downloads in Q1 2025. These genres have been very steady sources of new downloads in recent years.

Strategy was the only top genre to surpass 2% YoY growth in Q1 2025 with downloads climbing 7% YoY globally. Japan was a top market for Strategy games during the quarter with downloads climbing 19% YoY in the market. This wasn't surprising given the recent launch of Pokémon TCG Pocket capitalizing on Pokémon's popular IP in the country.

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 April 21, 2025.

Top Game Genres by Downloads in Q1 2025
iOS and Google Play



Q1 2025: **Top Apps**









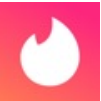



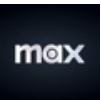







ChatGPT Approaches the Top Five Apps by IAP Revenue

The demand for generative AI is clearly still building as we enter 2025. ChatGPT has skyrocketed up the top charts by in-app purchase revenue, ranking just outside the top five at #6 in Q1 2025. Consumers spent more than \$330 million on ChatGPT's in-app subscription, nearly 50% growth over Q4 2024.

TikTok regained the lead in terms of global downloads after Instagram held the top spot for back-to-back quarters to close out 2024. The two apps have been neck-and-neck for the past three years, with each taking the top spot six of the past 12 quarters. ChatGPT moved up two spots to rank at by downloads #3 in Q1 2025.

Source: Sensor Tower
Note: iOS and Google Play combined. iOS only for China. Excludes third-party Android
Change is vs. the previous quarter (Q4 2024).

Top Apps in Q1 2025 iOS and Google Play

Worldwide					
In-App Purchase Revenue			Downloads		
Rank	Change	App	Rank	Change	App
1	=	 TikTok	1	▲ 1	 TikTok
2	=	 YouTube	2	▼ 1	 Instagram
3	=	 Google One	3	▲ 3	 ChatGPT
4	=	 Disney+	4	▼ 1	 WhatsApp Messenger
5	=	 Tinder Dating App	5	▼ 1	 Facebook
6	▲ 2	 ChatGPT	6	▼ 1	 Temu
7	=	 Max	7	=	 CapCut
8	▼ 2	 WeTV	8	▲ 1	 Telegram
9	=	 CapCut	9	▲ 3	 Snapchat
10	=	 Duolingo	10	▼ 2	 Threads










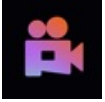










AI and Short Drama's Ascent on Mobile Continued into 2025

Two generative AI apps led the breakout IAP revenue and download rankings (ChatGPT and DeepSeek, respectively). The space is only getting more competitive with new apps including DeepSeek and Grok gaining traction.

Four of the top 10 apps by quarter-over-quarter (QoQ) IAP revenue growth were short drama apps with DramaBox and ReelShort leading the way. Many of these apps are continuing their global expansion, adding new markets after launching in a few key countries like the United States. New apps are vying for the short drama market as well, with Dramawave ranking as the #4 app by QoQ 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 (Q4 2024).

Top Breakout Apps by Growth in Q1 2025 vs. Q4 2024 iOS and Google Play

Worldwide							
In-App Purchase Revenue				Downloads			
Breakout Rank	Current Quarter Rank	Change	App Name	Breakout Rank	Current Quarter Rank	Change	App Name
1	6	▲ 2	 ChatGPT	1	11	NEW	 DeepSeek
2	2	=	 YouTube	2	14	▲ 96	 JioHotstar
3	20	▲ 4	 LINE Manga	3	3	▲ 3	 ChatGPT
4	24	▲ 3	 ReelShort	4	25	▲ 708	 Dramawave
5	17	▲ 4	 Amazon Shopping	5	78	▲	 PixVerse
6	27	▲ 2	 DramaBox	6	94	▲	 Grok
7	23	▼ 1	 piccoma	7	89	▲	 AI Photo Editor Collage Maker
8	13	▲ 4	 Amazon Prime Video	8	105	NEW	 PDF Reader & PDF Viewer
9	43	▲ 16	 GoodShort	9	43	▲ 101	 rednote
10	104	▲ 288	 FlickReels	10	112	▲	 PDF Viewer

Q1 2025: **Top Games**

Top Mobile Games Charts

Point to a Stable Market

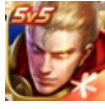



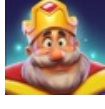

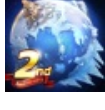
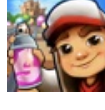
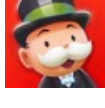

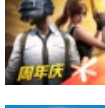
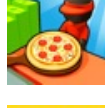

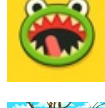
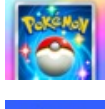

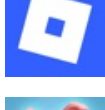
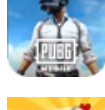
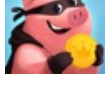
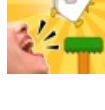
It is more challenging than ever for new games to compete in 2025. As a result, the top games by IAP revenue in Q1 2025 were many titles that had ranked among the top 10 before (including nine of the top 10 from the previous quarter). A few new titles have still managed to find success in recent years, including Pokémon TCG Pocket released in late 2024.

The top games by downloads also included many older titles. All of the top five games launched in 2022 or earlier, and four of the top five released before 2018.

Source: Sensor Tower
Note: iOS and Google Play combined. iOS only for China. Excludes third-party Android
Change is vs. the previous quarter (Q4 2024).

Top Games in Q1 2025

iOS and Google Play

< Worldwide ▾ >					
In-App Purchase Revenue			Downloads		
Rank	Change	App	Rank	Change	App
1	=	 Honor of Kings	1	=	 Garena Free Fire
2	=	 Last War: Survival	2	=	 Block Blast!
3	=	 Royal Match	3	▲ 1	 Roblox
4	▲ 1	 Whiteout Survival	4	▲ 1	 Subway Surfers
5	▼ 1	 MONOPOLY GO!	5	▲ 3	 Ludo King
6	▲ 6	 Game for Peace	6	▲ 4	 Pizza Ready!
7	▲ 1	 Candy Crush Saga	7	▲ 4	 Hole.io
8	▼ 1	 Pokémon TCG Pocket	8	▲ 152	 456 Run Challenge
9	▼ 3	 Roblox	9	▲ 9	 PUBG MOBILE
10	▼ 1	 Coin Master	10	▼ 7	 Mini Games: Calm & Relax





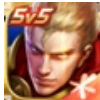






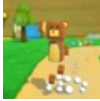
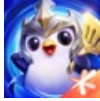

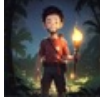



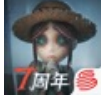

Q1 2025 was a Huge Quarter for Tencent

Tencent accounted for four of the top 10 mobile games by QoQ IAP revenue growth in Q1 2025, including all of the top three games. The world's top mobile game publisher saw revenue climb 22% QoQ. Other Chinese publishers were also common among the top breakout rankings, including HABBY, Century Games, and NetEase.

456 Run Challenge, an asymmetric battle game, was the top breakout game by global downloads in Q1 2025. It was joined by several Simulation games (Cat Chaos: Prankster, Roblox, Extreme Car Driving Simulator) and Arcade games (I Am Security, Super Bear Adventure, Survival Escape: Prison Escape).

Source: Sensor Tower
Note: iOS and Google Play combined. iOS only for China. Excludes third-party Android
Change is vs. the previous quarter (Q4 2024).

Top Breakout Games by Growth in Q1 2025 vs. Q4 2024 iOS and Google Play

Worldwide									
In-App Purchase Revenue					Downloads				
Breakout Rank	Current Quarter Rank	Change		App Name	Breakout Rank	Current Quarter Rank	Change		App Name
1	6	▲	6	 Game for Peace	1	8	▲	152	 456 Run Challenge
2	15	▲	81	 CrossFire: Legends	2	17	▲	980	 FPS Strike Ops : Modern Arena
3	1	=		 Honor of Kings	3	23	▲	749	 Cat Chaos: Prankster
4	26	▲	53	 DRAGON BALL Z DOKKAN BATTLE	4	3	▲	1	 Roblox
5	38	▲	84	 Archer0 2	5	43	NEW		 I Am Security
6	4	▲	1	 Whiteout Survival	6	25	▲	443	 Super Bear Adventure
7	17	▲	8	 TFT: Teamfight Tactics	7	49	▲		 Survival Escape: Prison Game
8	52	▲	57	 Dark War Survival	8	48	▲		 Color Block Jam
9	109	NEW		 Where Winds Meet	9	20	▲	165	 Prison Survival: Tap Challenge
10	36	▲	24	 Identity V	10	21	▲	158	 Extreme Car Driving Simulator

Q1 2025: **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 through March 31, 2025.
- 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 uses 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 Amazon Prime Video, Disney+, HBO Max, Hulu, Netflix, Pluto TV, Tubi, Peacock, and Paramount+.



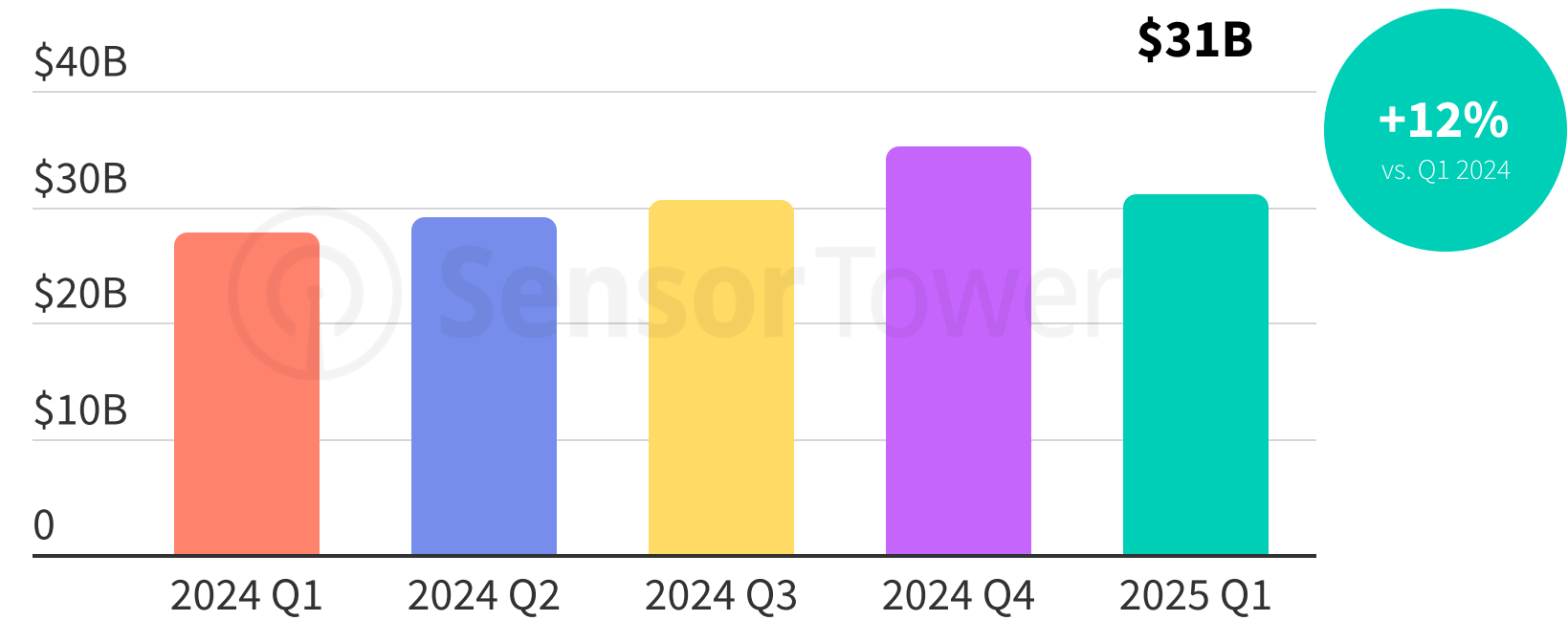
The Digital Advertising Market Keeps Building Momentum into 2025

Digital ad spend in the United States across mobile, desktop, and OTT reached \$31 billion in Q1 2025 with a record-high 3.9 trillion impressions. The digital ad market shows no signs of slowing down as both spend and impressions achieved more than 10% growth YoY.

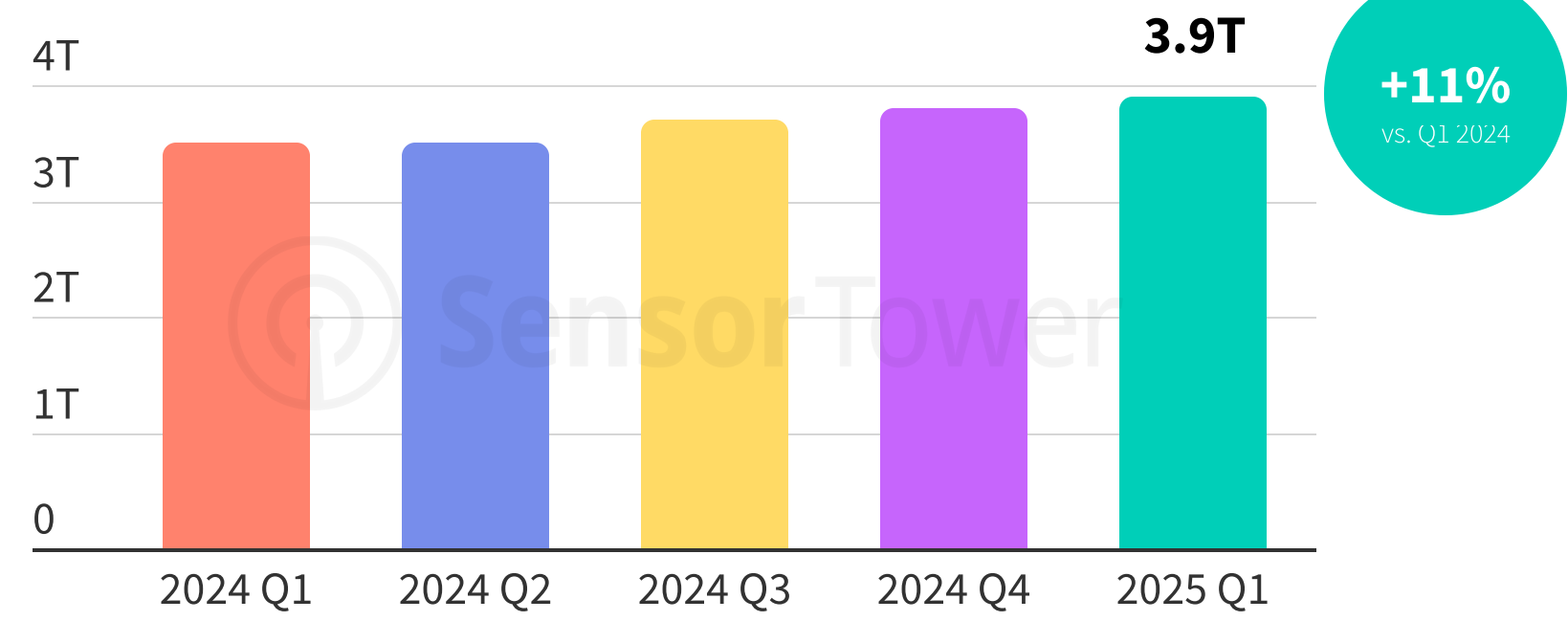
Ad spend growth was particularly high in European markets like France (+17% YoY), Italy (+16%), Spain (+16%), and the UK (+15%). The digital ad market also displayed strong growth in top APAC markets like South Korea and Japan. Please note that the included ad channels vary by market.

Source: Sensor Tower
Note: Includes a selection of advertising channels. Ad spend estimates as of April 21, 2025. Available ad channels vary by market. See [Appendix \(page 43\)](#) 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	✓
LinkedIn	✓
Pinterest	✓
Reddit	✓
Snapchat	✓
TikTok	✓
X (formerly Twitter)	✓
YouTube	✓
Desktop Display	✓
Mobile Display	✓
OTT	✓
Desktop Video	✓
Mobile Video	○

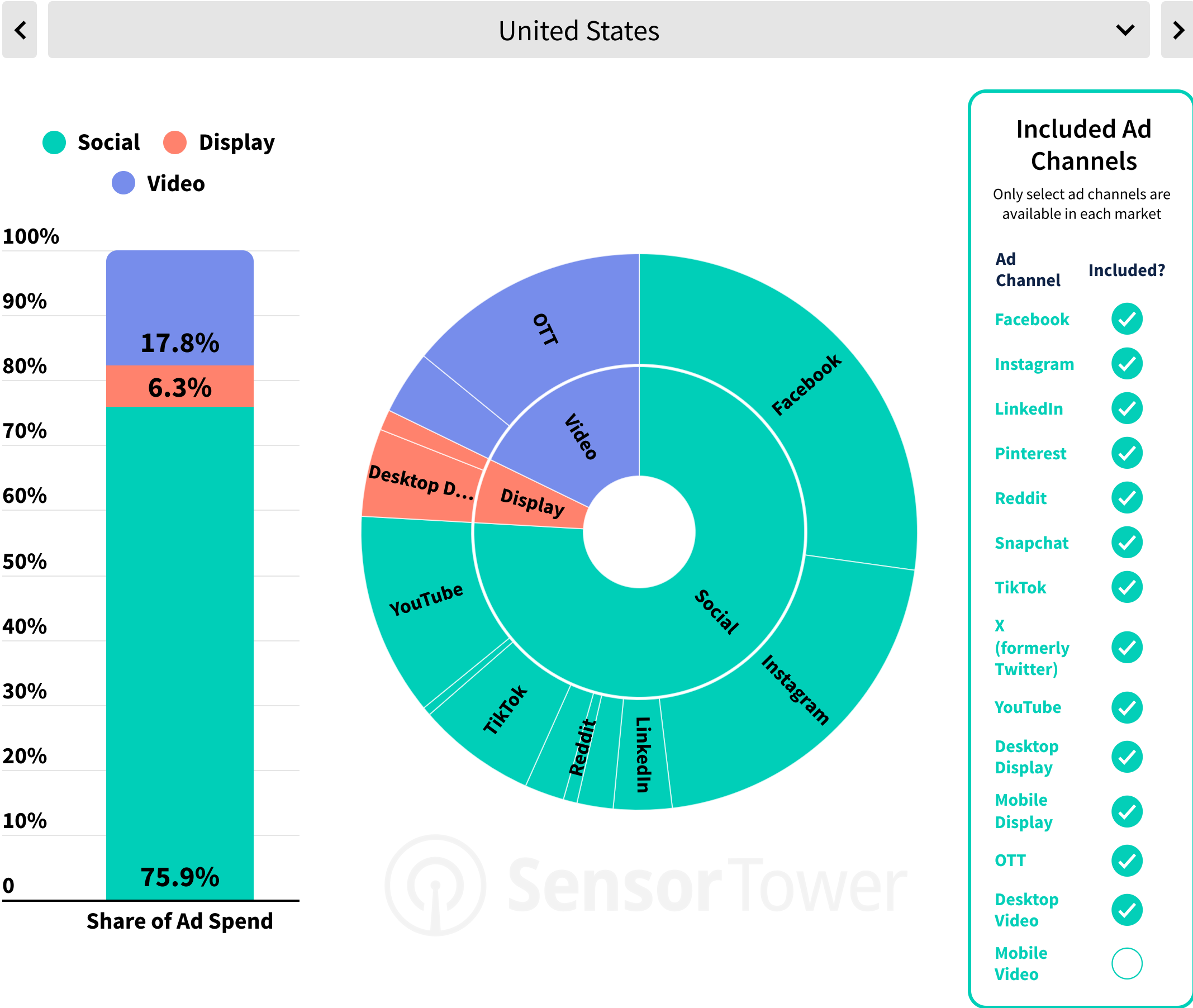
Social Remained the Primary Focus for Digital Advertisers, Though OTT's Share is Growing

Among included digital ad channels in the US, social networks account for the bulk of ad spend. Nine top social networks including Facebook, TikTok, and YouTube had more more than 75% of digital ad spend in Q1 2025. Facebook and Instagram alone accounted for nearly 48% of all spend, followed by YouTube (12%) and TikTok (7%).

Among digital ad channels besides social media, OTT was the largest, accounting for 14% of US ad spend in Q1 2025. OTT ad spend also grew at a faster rate than social media over the past year, climbing 23% YoY (compared to 11% for social media).

Source: Sensor Tower
Note: Includes a selection of advertising channels. Ad spend estimates as of April 21, 2025. Available ad channels vary by market. See [Appendix \(page 43\)](#) for list of ad channels included in each market.

Share of Digital Ad Spend by Channel in Q1 2025



Sensor Tower

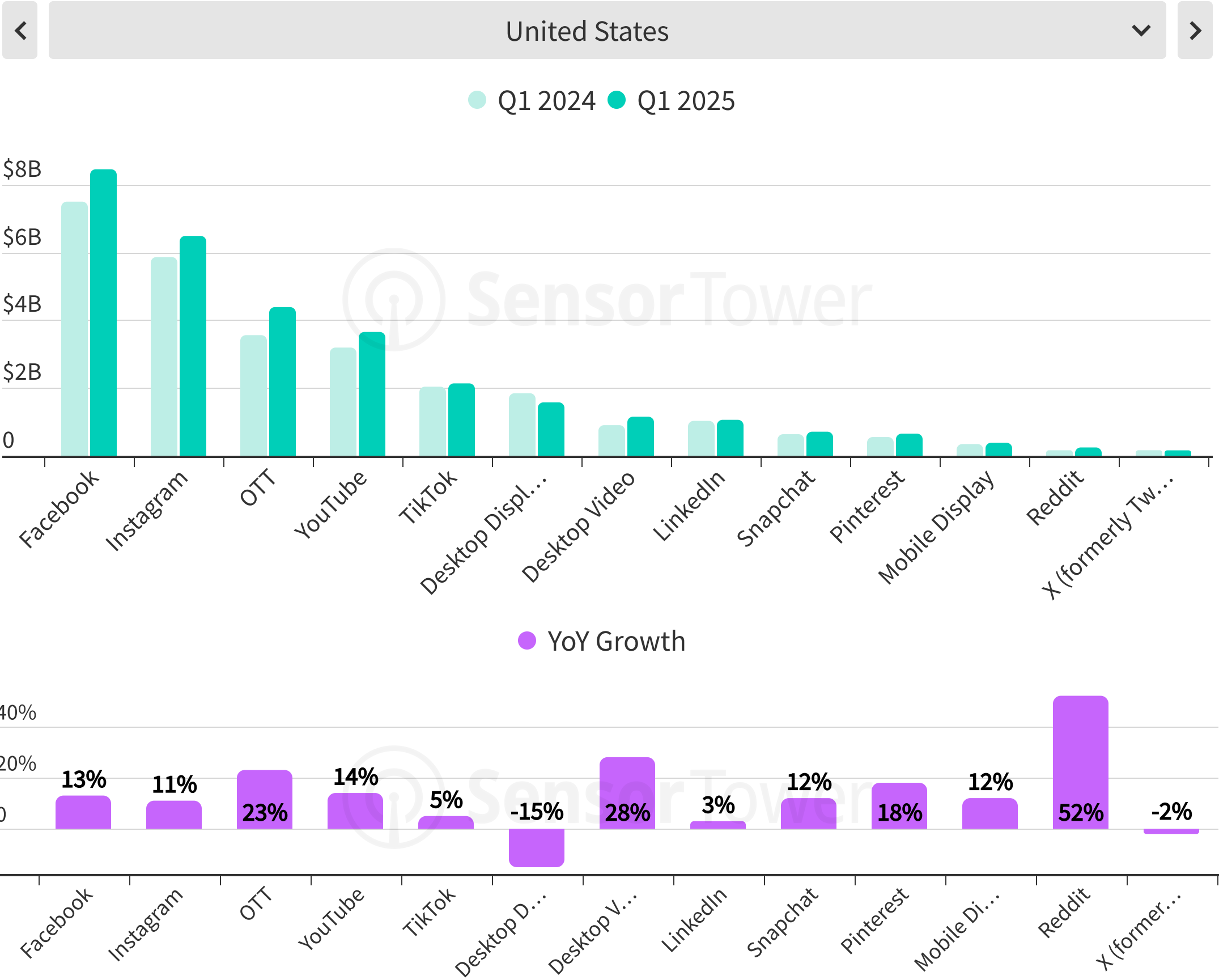
Video Ads are Becoming More Popular in the US

Many of the fastest growing ad channels in the US rely entirely or heavily on video ads, including OTT, YouTube, and Desktop Video. Overall, ad spend on video formats (including story and reel posts) climbed 18% YoY, compared to a 6% decline in ad spend for other formats.

Reddit was the fastest growing channel in the US over the past year, though it remained relatively small compared to other social networks like Facebook and TikTok.

Source: Sensor Tower
Note: Includes a selection of advertising channels. Ad spend estimates as of April 21, 2025. Available ad channels vary by market. See [Appendix \(page 43\)](#) for list of ad channels included in each market.

Year-over-Year Digital Ad Spend Growth by Channel in Q1 2025



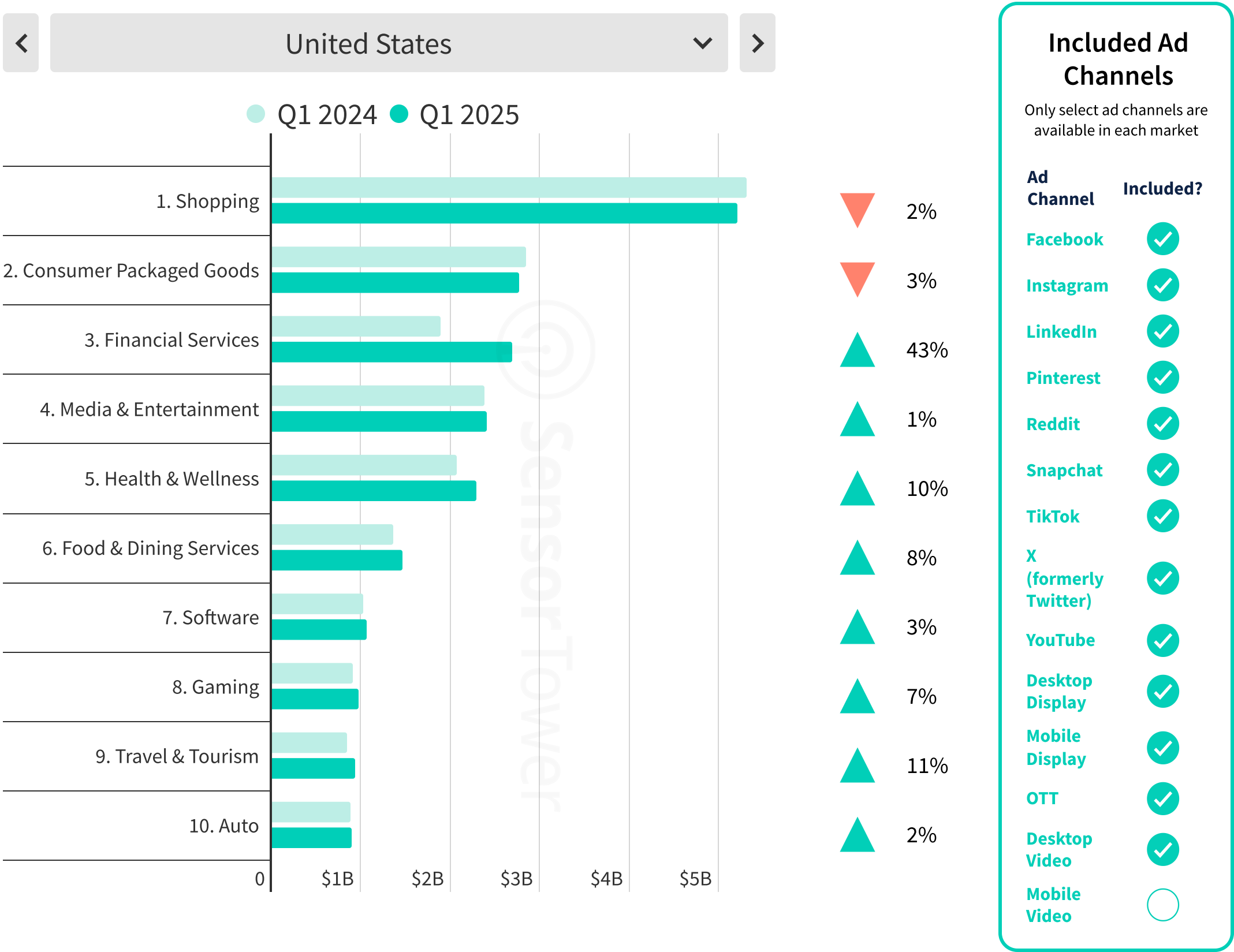
Shopping Ad Spend Declined in the US as Temu Turns Attention to Other Markets

US ad spend on Shopping declined slightly YoY, reflecting a shift in strategies from Chinese-backed retailers like Temu and SHEIN. These companies have scaled back their ad spend in the US while turning their attention to other markets in Europe, Asia, and Latin America.

Advertising for Financial Services soared in Q1 2025, climbing 43% YoY. Tax season in the US certainly provided a boost with advertisers like TurboTax and H&R Block running major ad campaigns, but Financial Services ad spend was already climbing even before this quarter. Investing & Financial Management ad spend nearly doubled YoY as cryptocurrencies saw a resurgence, while Insurance ad spend climbed 51%.

Source: Sensor Tower
Note: Includes a selection of advertising channels. Ad spend estimates as of April 21, 2025. Available ad channels vary by market. See [Appendix \(page 43\)](#) for list of ad channels included in each market.

Top Categories by Digital Ad Spend in Q1 2025



Three Advertisers Entered the Top 10 by Ad Spend in the US

Seven of the top 10 advertisers from Q4 2024 returned in Q1 2025, including Procter & Gamble, Amazon.com, and The Walt Disney Company. Procter & Gamble and Amazon.com have consistently ranked as the top two advertisers in the US for more than a year.

TurboTax surged into the top 10 advertisers as it advertised its services ahead of tax season in the US. Robinhood Markets also invested more in advertising in Q1 2025, primarily due to its significant presence on YouTube where it was the top US advertiser in the quarter.

Source: Sensor Tower
Note: Includes a selection of advertising channels. Ad spend estimates as of April 21, 2025. Available ad channels vary by market. See [Appendix \(page 43\)](#) for list of ad channels included in each market.

Top Advertisers by Digital Ad Spend in Q1 2025

United States		
Rank	Advertiser	Change vs. 2024 Q4
1	Procter & Gamble	▲ 1
2	Amazon.com	▼ 1
3	The Walt Disney Company	=
4	Comcast Corporation	=
5	Expedia, Inc.	▲ 9
6	TurboTax	▲▲ 277
7	Deutsche Telekom	▲ 1
8	Paramount	▼ 1
9	Liberty Mutual Insurance Company	=
10	Robinhood Markets, Inc.	▲ 76

Included Ad Channels

Only select ad channels are available in each market

Ad Channel	Included?
Facebook	✓
Instagram	✓
LinkedIn	✓
Pinterest	✓
Reddit	✓
Snapchat	✓
TikTok	✓
X (formerly Twitter)	✓
YouTube	✓
Desktop Display	✓
Mobile Display	✓
OTT	✓
Desktop Video	✓
Mobile Video	○

Breakout Advertisers Reflect Seasonal Trends in the US

Most of the top advertisers by QoQ ad spend growth reflect seasonal patterns in the US. TurboTax, Intuit, and H&R Block ran their tax season campaigns, while Flutter Entertainment (FanDuel) increased ad spend for major sports events including the Super Bowl and March Madness.

Interestingly, Temu's ad spend in the US increased QoQ in Q1 2025, though it was still well below its levels of investment throughout most of 2023 and 2024. This was also before the US announced higher tariffs on Chinese imports in April 2025, after which Temu's ad spend in the US dropped off significantly.

Source: Sensor Tower
Note: Includes a selection of advertising channels. Ad spend estimates as of April 21, 2025. Available ad channels vary by market. See [Appendix \(page 43\)](#) for list of ad channels included in each market.

Top Breakout Advertisers by Digital Ad Spend Growth in Q1 2025 vs. Q4 2024

<

United States

>

Rank	Advertiser	Rank in 2025 Q1	Change vs. 2024 Q4
1	TurboTax	6	<div><div></div><div></div></div> 277
2	Robinhood Markets, Inc.	10	<div><div></div></div> 76
3	Intuit, Inc.	13	<div><div></div></div> 41
4	H&R Block	37	<div><div></div><div></div></div> 3657
5	Expedia, Inc.	5	<div><div></div></div> 9
6	Temu (Whaleco Inc.)	12	<div><div></div></div> 10
7	Kenvue Inc. - (ケンビュウ)	15	<div><div></div></div> 17
8	Nestle	18	<div><div></div></div> 19
9	Flutter Entertainment Plc	35	<div><div></div></div> 52
10	Eli Lilly and Company	39	<div><div></div></div> 62

Included Ad Channels

Only select ad channels are available in each market

Ad Channel	Included?
Facebook	<div><div></div></div>
Instagram	<div><div></div></div>
LinkedIn	<div><div></div></div>
Pinterest	<div><div></div></div>
Reddit	<div><div></div></div>
Snapchat	<div><div></div></div>
TikTok	<div><div></div></div>
X (formerly Twitter)	<div><div></div></div>
YouTube	<div><div></div></div>
Desktop Display	<div><div></div></div>
Mobile Display	<div><div></div></div>
OTT	<div><div></div></div>
Desktop Video	<div><div></div></div>
Mobile Video	<div><div></div></div>


Q1 2025: **Retail Media Advertising Overview**


What is Retail Media Insights?

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: Target**


**Target**


Buy one, get one 50% off board games & puzzles this week at Target




Operation Board Game [Shop Now](#)

Advertiser: Hasbro


**Retailer: Chewy**


**Chewy**


Hurry! Your pet's favorite toys, treats & more are still here with fast, free shipping. Because pets love presents, too!




Purina Beneful Chopped Blends with Salmon, Sweet Potatoes, Brown Rice & Spinach Wet Dog Food, 10-oz container, case of 8 [Shop Now](#)

Advertiser: Purina PetCare


**Retailer: Best Buy**


**Best Buy**


More power.



Power boosted with a faster processor, more memory, and more storage. That's the all-new Chromebook Plus. [Shop Now](#)


Advertiser: Google


**Retailer: Home Depot**




GET GAME-CHANGING DURABILITY WITH BEHR® PAINT

The Home Depot is an Official Sponsor of ESPN College GameDay



Advertiser: Behr Paint Company

 Sensor Tower - All Rights Reserved

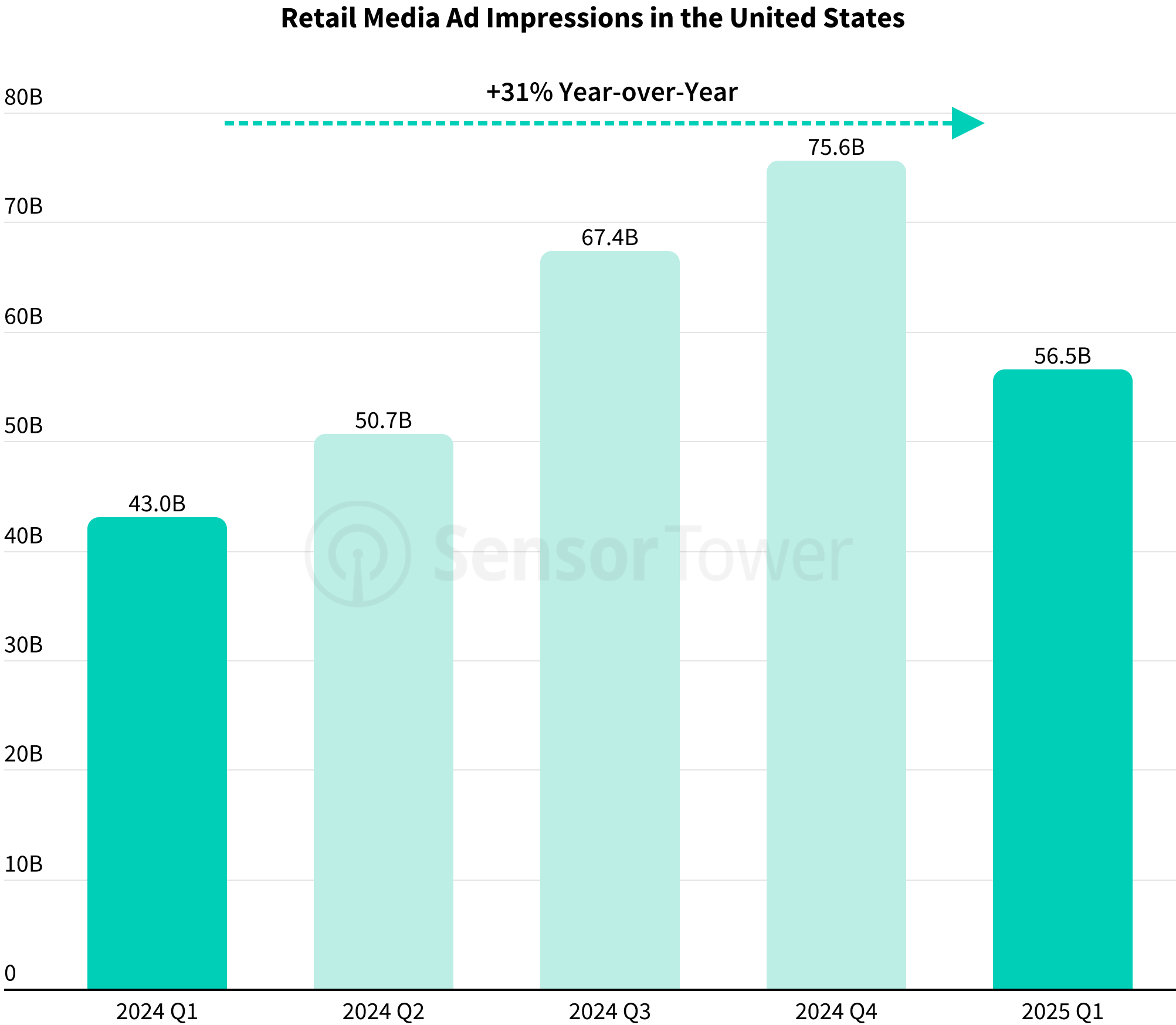
36

Retail Media is an Increasingly Important Part of Brands' Marketing Strategy

Retail media ad impressions in the US climbed 31% YoY to surpass 56 billion across top retailers like Walmart and Chewy.

While Q1 2025 retail media impressions were down 25% from Q4 2024, this reflects seasonal patterns in the US as retail media advertising peaks during the holiday season.

Source: Sensor Tower
Note: Includes a selection of top US retailers.



Walmart is the Consistent Leader in US Retail Media

Walmart maintained its spot as the leader in retail media, followed by Chewy (up from #4 in Q4 2024). Best Buy and Sephora moved down four and three spots, respectively, after seeing impressions spike during the holiday season, while Macy's fell out of the top 10.

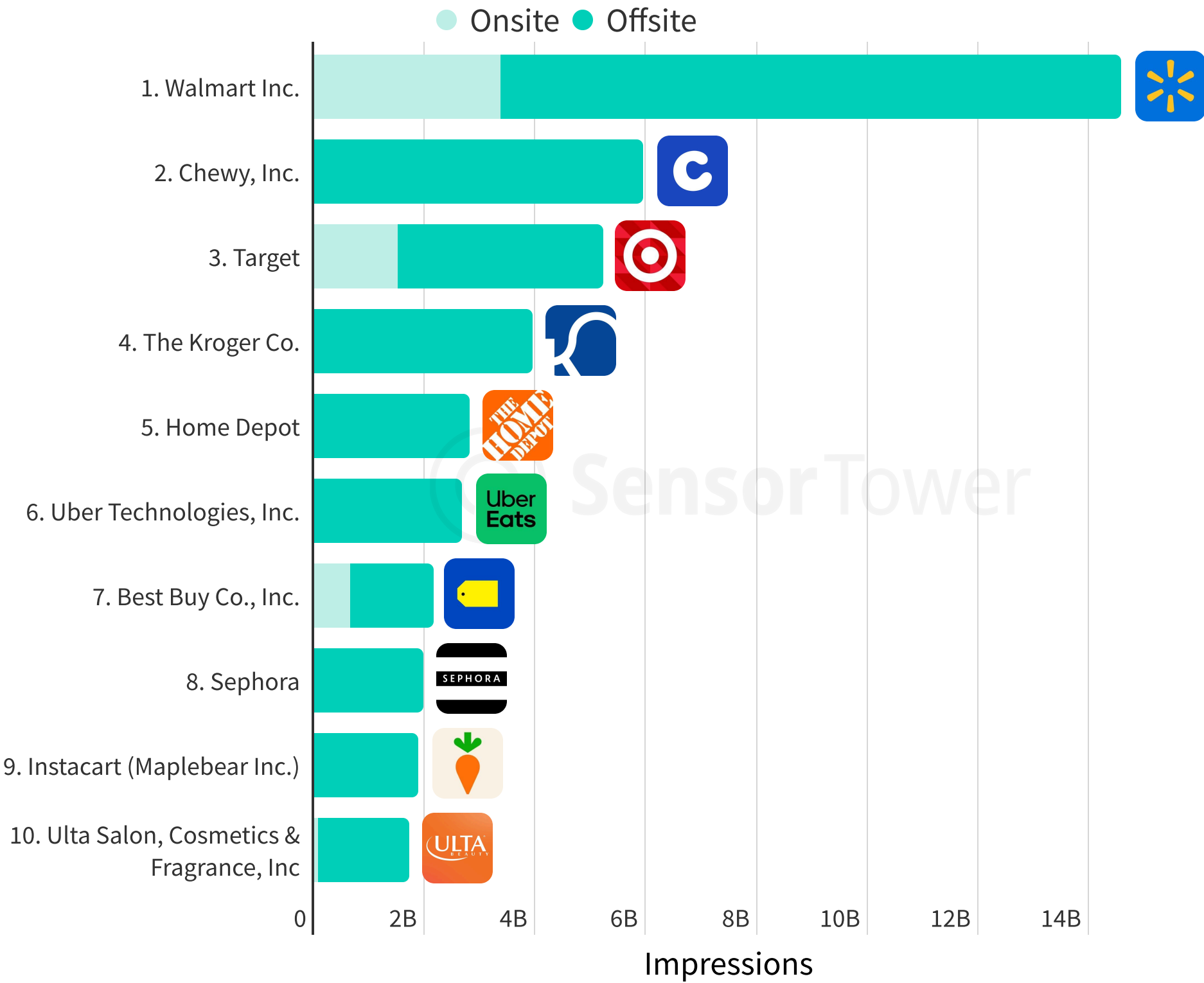
Definitions:

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.

Top Retail Media Retailers by Impressions in the United States
Q1 2025



Food & Beverages Led Retail Media Advertising in Q1 2025

Food & Beverages was the top category for US retail media impressions in Q1 2025, surpassing Personal Care for the first time in at least four quarters. Walmart, Instacart, and Kroger were the top retailers in the category.

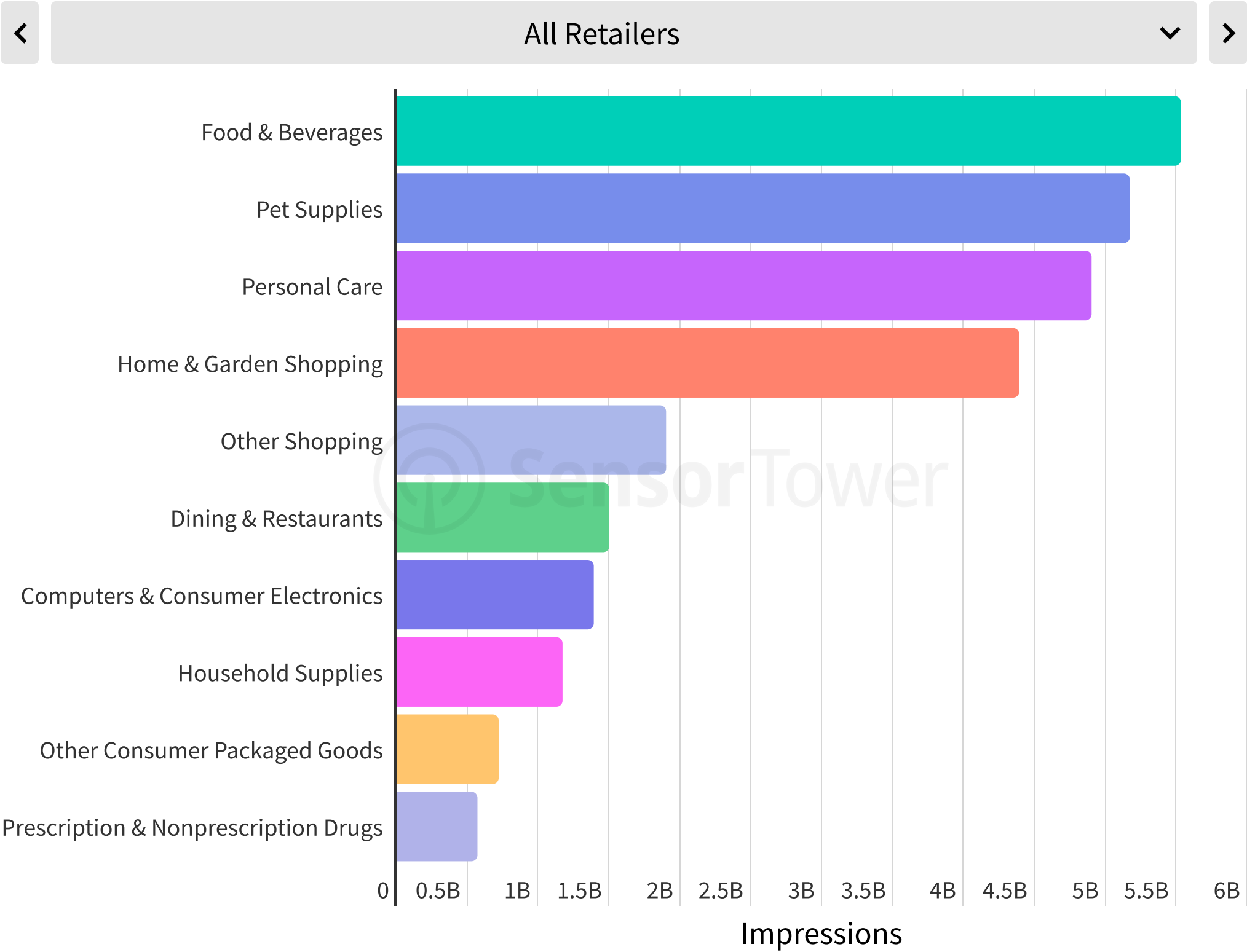
Pet Supplies, Personal Care, and Home & Garden Shopping remained popular categories for retail media as well.

Definition:

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.

Top Categories by Retail Media Advertising Impressions in the United States
Q1 2025



Walmart is a Popular Choice for Retail Media Across Categories

Walmart was the top option for retail media across a number of categories including Food & Beverages, Home & Garden Shopping, Personal Care, and Prescription & Nonprescription Drugs.

Other categories were led by more specialized retailers, such as Pet Supplies (Chewy), Dining & Restaurants (Uber Technologies) and Computers & Consumer Electronics (Best Buy).

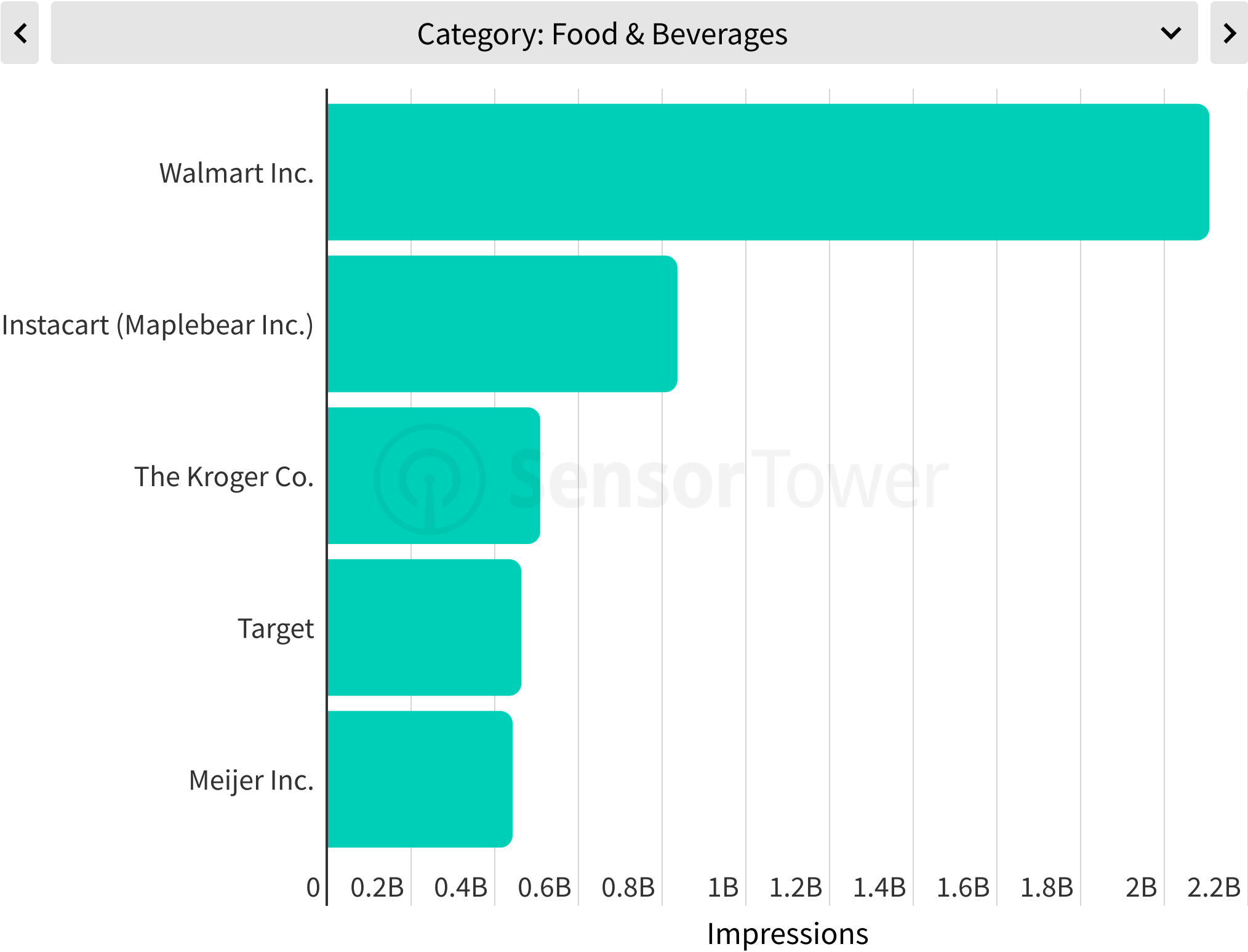
Definition:

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.

Top Retail Media Retailers by Category in the United States

Q1 2025



Brands Found Success with Walmart and Chewy Partnerships in Q1 2025

Many of the top retailer / advertiser combinations by US impressions in Q1 2025 included either Walmart or Chewy. Apex Tool Group was the top advertiser on Walmart, while Mars barely surpassed General Mills as the top advertiser on Chewy. Brands clearly find these retailers to be valuable for getting their products surfaced for consumers.



Chewy

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





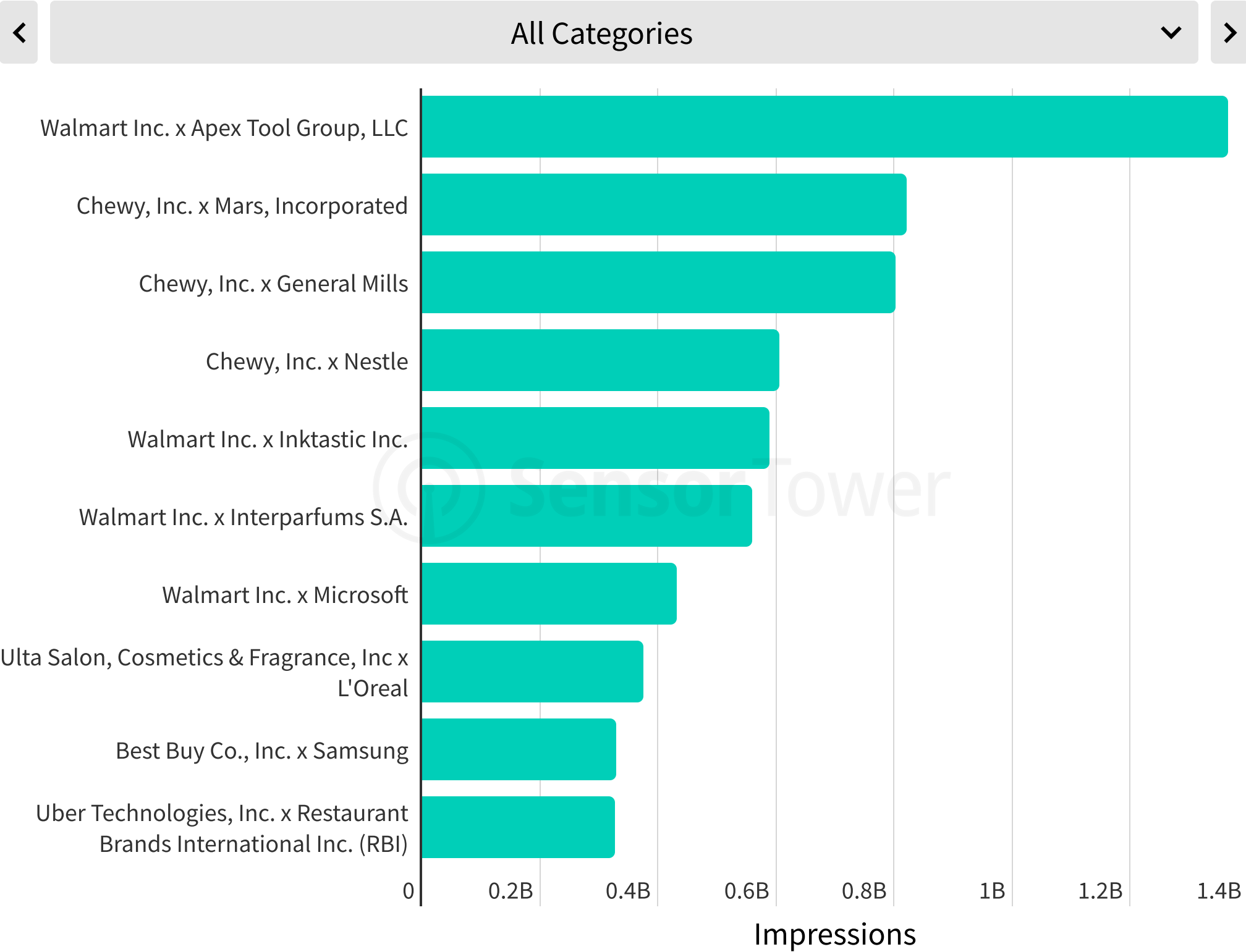
Retailer:
Chewy



Advertiser:
Purina


Source: Sensor Tower
Note: Includes a selection of top US retailers.

Top Co-Branded Retailer / Advertiser Combinations in the United States
Q1 2025




Dig Deeper into Co-Branded Advertising Partnerships and Opportunities

Some advertisers diversify their approach when it comes to retail media. For example, Nestle was a top co-branded advertiser at Walmart, Chewy, Target, and Instacart. The product mix advertised still varies by retailer however. For example, a Purina brand product from Nestle was the most advertised at Chewy and Instacart, while the top product at Walmart was a protein supplement.



Walmart

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



Retailer: Walmart

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.

Top Co-Branded Advertisers for United States Retailers by Impressions

Q1 2025

Retailer: Walmart Inc. < >			
Rank	Co-Branded Advertiser	Top Product	Example Creative
1	Apex Tool Group, LLC	Crescent Tools	Photo Post
2	Inktastic Inc.	Inktastic Inc.	Photo Post
3	Interparfums S.A.	Jimmy Choo Beauty/Fragrances	Photo Post
4	Microsoft	Xbox One	Photo Post
5	Procter & Gamble	Pampers	Video
6	Unilever	OLLY Women's Multi	Banner
7	Nestle	Orgain Organic Plant Based Protein	Banner
8	General Mills	Totinos Pizza Rolls	Photo Post
9	Kenvue Inc. - (ケンビュー)	Aveeno Daily Moisturizing Cream	Video
10	Haleon plc	Eroxon	Video Post




Appendix:























































































































































































Digital Advertising Ad Channels by Market

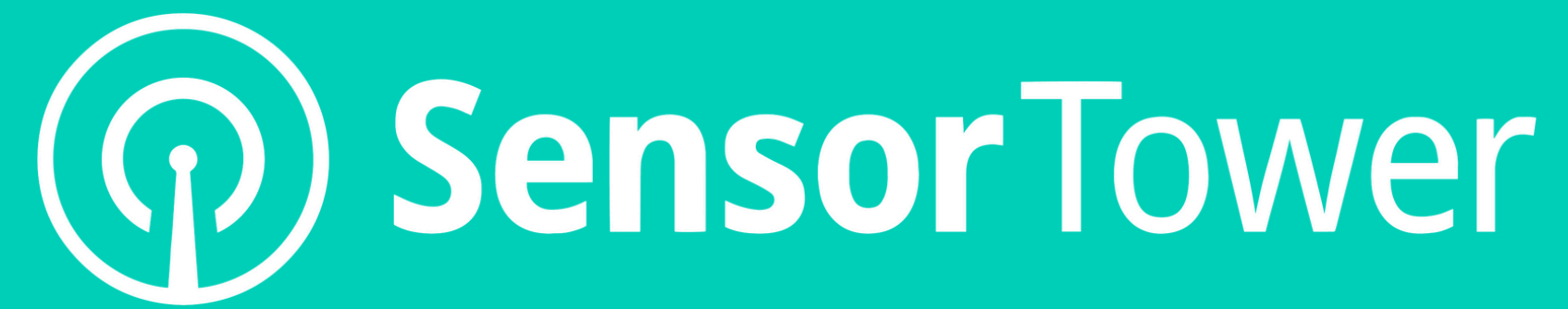
Data includes select channels in each market. Figures in this report represent the totals for these channels only, not across all digital formats.

- At this time, our technology allows us to report down to nine individual streaming services: Amazon Prime Video, Disney+, HBO Max, Hulu, Netflix, Peacock, Paramount+, tubi and PlutoTV. All other OTT campaigns outside of these nine services are grouped into a single OTT Streaming Services (General) bucket.
- Several new ad channels have been recently released and are not yet in this report, including TikTok and YouTube in South Korea and LINE in Japan. These are available for Sensor Tower customers at <https://pathmatics.sensortower.com> or you can [request a demo here](#).

Included Ad Channels by Market

Key:  Included ad channel  Recently added channel (only included in select slides)  Ad channel not included in market

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



About Sensor Tower

Sensor Tower is the leading source of mobile app, digital advertising, retail media, and audience insights for the largest brands and app publishers across the globe.

With a mission to measure the world's digital economy, Sensor Tower's award-winning platform delivers unmatched visibility into the mobile app and digital ecosystem, empowering organizations to stay ahead of changing market dynamics and make informed, strategic decisions.

Founded in 2013, Sensor Tower's mobile app insights have helped marketers, app, and game developers demystify the mobile app landscape with visibility into usage, engagement, and paid acquisition strategies. Today, Sensor Tower's digital market insights platform has expanded to include Audience, Retail Media, and Pathmatics Digital Advertising Insights, helping brands and advertisers understand their competitor's advertising strategies and audiences across web, social, and mobile.

Press Inquiries: press@sensortower.com





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Request a free demo!



Get the latest insights on our blog: sensortower.com/blog