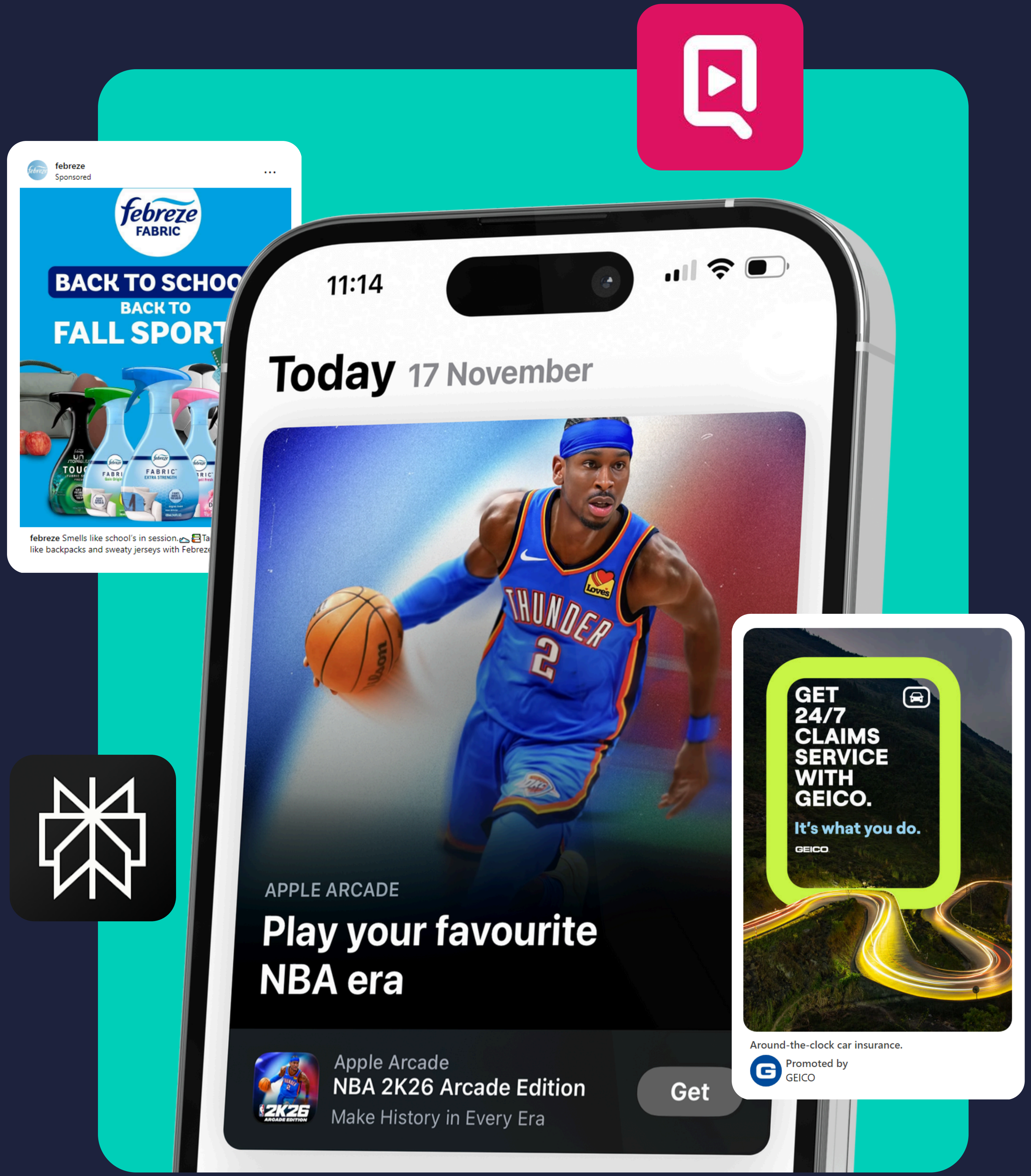
Sensor Tower

Q3 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

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

Executive Summary

Mobile in Q3 2025

In-app purchase (IAP) revenue

$43.2B

+11.3% vs. Q3 2024

- **Non-Games Continue to Fuel Growth:** Non-game revenue expanded its lead over the gaming sector, driven by more than 20% YoY growth. This surge is nearly universal across top categories like Media & Entertainment and Generative AI, which alone grew sixfold YoY to nearly $1.5 billion.
- **Gaming Posts Second-Best Quarter Ever:** Mobile gaming showed strong resilience, recording its second-highest quarterly revenue total ever and narrowly missing its pandemic peak. Success is split between new and old titles. Strategy and Puzzle games provided the best revenue opportunities, replacing RPGs as the top-grossing genre.
- **US Dominance and Emerging Regional Momentum:** The United States remains the premier market for IAP revenue. This growth is complemented by strong regional performance in Europe and Latin America.
- **ChatGPT's Rapid Ascent:** The generative AI revolution has dramatically reshaped the top grossing charts, with ChatGPT rapidly climbing from #16 a year ago to #2 in Q3 2025 by IAP revenue, placing it just behind TikTok.

Downloads

37.6B

+0.8% vs. Q3 2024

- **Market Stabilization and Non-Game Downloads Bolstered by AI:** While global downloads remain stable overall, non-game downloads grew by 5.5% as the market corrected post-pandemic and was boosted by new tools featuring AI.
- **Emerging Markets Drive Download Growth:** While downloads have leveled out in many markets, India saw a strong rebound in Q3 2025. Pockets of growth were evident across the globe, including several countries in Africa (e.g., Nigeria, Côte d'Ivoire) and Asia (e.g., South Korea).
- **Nine of the Top 10 Genres Had Positive Download Growth:** Download growth was consistent across most non-game genres as AI provided a nice boost across verticals, from Business & Productivity Software to Multimedia & Design Software and Education & Training.
- **AI and Short Drama Dominate New Consumer Demand:** Competition is intense in the AI space, with new surges from Google Gemini and breakout apps like Perplexity and Seekee driving volume. Outside of AI, Short Drama apps (like QuickTV and DramaBox) are the fastest-growing mobile vertical, demonstrating the strong appetite for new, quick-consumption entertainment formats.

Executive Summary
Digital Advertising in Q3 2025

United States Digital Ad Spend

$35.9B

+12.1% vs. Q3 2024

- **United States digital ad spend leveled up ahead of the holiday season:** US digital ad spend approached $36 billion (+12% YoY) in Q3 2025 with 4 trillion impressions (+8% YoY). The digital ad market demonstrates sustained growth, as ad impressions surpassed the volume of the typically higher Q4 peak, pointing to a record-setting Q4 ahead.
- **Shopping Ad Spend Declined While Gaming Spend Soared:** The Shopping category continued its decline, recording a consistent YoY drop in ad spend across the first three quarters of 2025. This downturn was compounded by the new tariffs in the US, which prompted key Chinese-backed retailers like Temu and SHEIN to pullback spend. However, these retailers increased their spend again in Q3 suggesting that they are not abandoning the market just yet.
- **Top Advertiser Procter & Gamble Leaned on OTT to Win the Back-to-School Season:** In Q3 2025, Procter & Gamble heavily invested on Over-the-Top (OTT) channels, with a 58% QoQ surge in spending. Cord Cutters are nearly two times as likely to fit the "parent" persona than the general population, making OTT an efficient channel.

United States Retail Media Impressions

72.4B

+7% vs. Q3 2024

- **Retail Media Networks Maintain Strong Growth Momentum:** Retail media ad impressions in the US climbed 7% YoY to 72 billion across 30 top retailers like Walmart and Target. Note that Amazon.com has been excluded since data is available in Sensor Tower starting January 1, 2025.
- **Amazon is Surpassing All Rivals Combined in US Retail Media Impressions:** Amazon had over 80 billion retail media impressions in Q3 2025, surpassing the other 30 included retailers combined. The majority (71%) of Amazon's impressions being onsite, displayed directly on Amazon.com.
- **Personal Care is the Most Competitive Retail Media Category:** Personal Care, Home & Garden Shopping, Food & Beverages, and Computers & Consumer Electronics all surpassed 8 billion impressions in Q3 2025. Pet Supplies is another popular category, led by retailers like Chewy, PetSmart, and Petco.

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Mobile Market Overview

About this Data:
Mobile App Methodology

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

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

Figures cited in this report reflect iOS App Store and Google Play download and revenue estimates for January 1, 2014 through September 30, 2025.

In-app purchase (IAP) revenue includes paid downloads, in-app purchases, and subscriptions from the iOS App Store and Google Play. This does not include any revenue from advertisements or third-party purchases.

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

In-app purchase (IAP) revenue estimates are gross — inclusive of any percent taken by the app stores.

View Detailed Report Methodology Here.

Quarterly IAP Revenue Continued its Climb Towards $50 Billion

Global in-app purchase (IAP) revenue across iOS and Google Play surpassed $43 billion for the first time in Q3 2025, maintaining steady year-over-year (YoY) growth at approximately 11%.

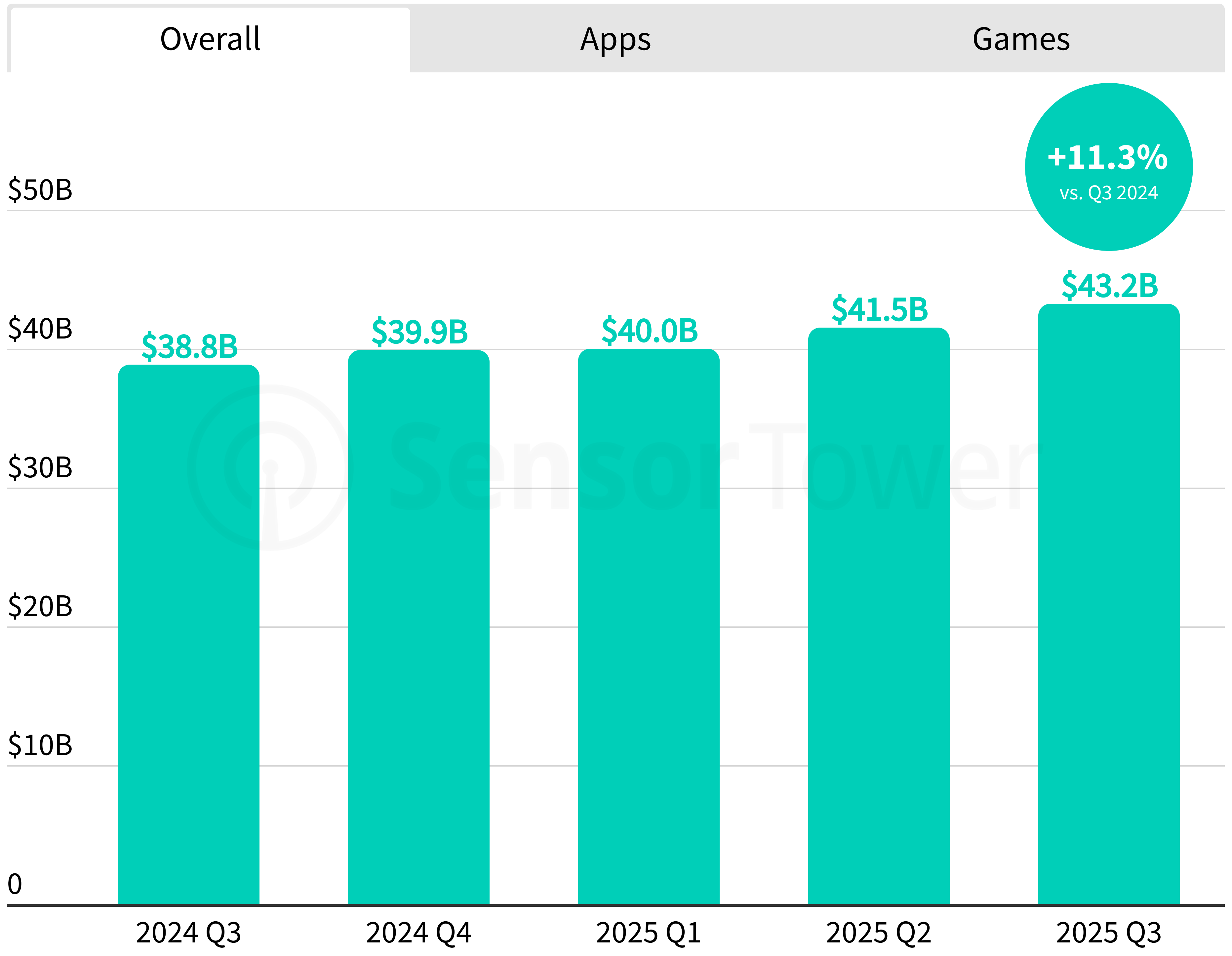
One quarter after non-game revenue first surpassed games, the non-game segment expanded its lead, reaching $22.3 billion in Q3 2025 (approximately 52% of overall spend). This shift was fueled by more than 20% YoY growth as consumers increased spending on a wide array of apps, from streaming services to AI tools.

The mobile gaming market also showed positive signs. While growth was more modest at 2.5% YoY, mobile games recorded their second-highest quarterly revenue ever, narrowly trailing the Q1 2021 pandemic peak.

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 Q3 2024 - Q3 2025

iOS and Google Play

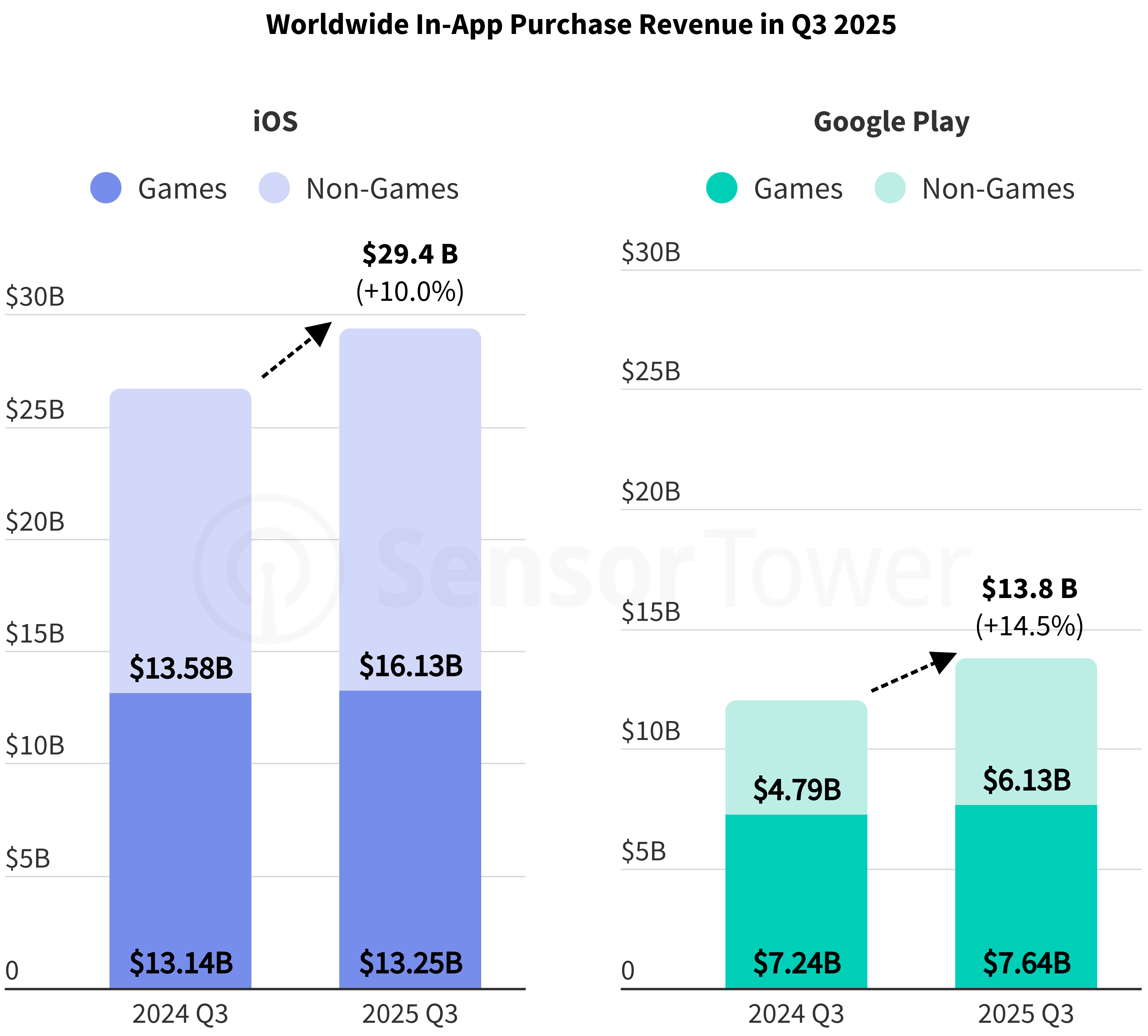


Both iOS and Google Play Achieve Double-Digit IAP Revenue Growth

iOS remained the leading platform for mobile monetization with nearly $30 billion in IAP revenue in Q3 2025. Non-games, in particular, are a good fit for in-app purchases and subscriptions on the platform: iOS accounted for 72% of non-game spend across both platforms.

Meanwhile, Google Play demonstrated higher growth potential, with revenue on the platform climbing nearly 15% YoY. Games still make up the bulk of Google Play's revenue, though the gap between games and non-games is closing fast.

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.



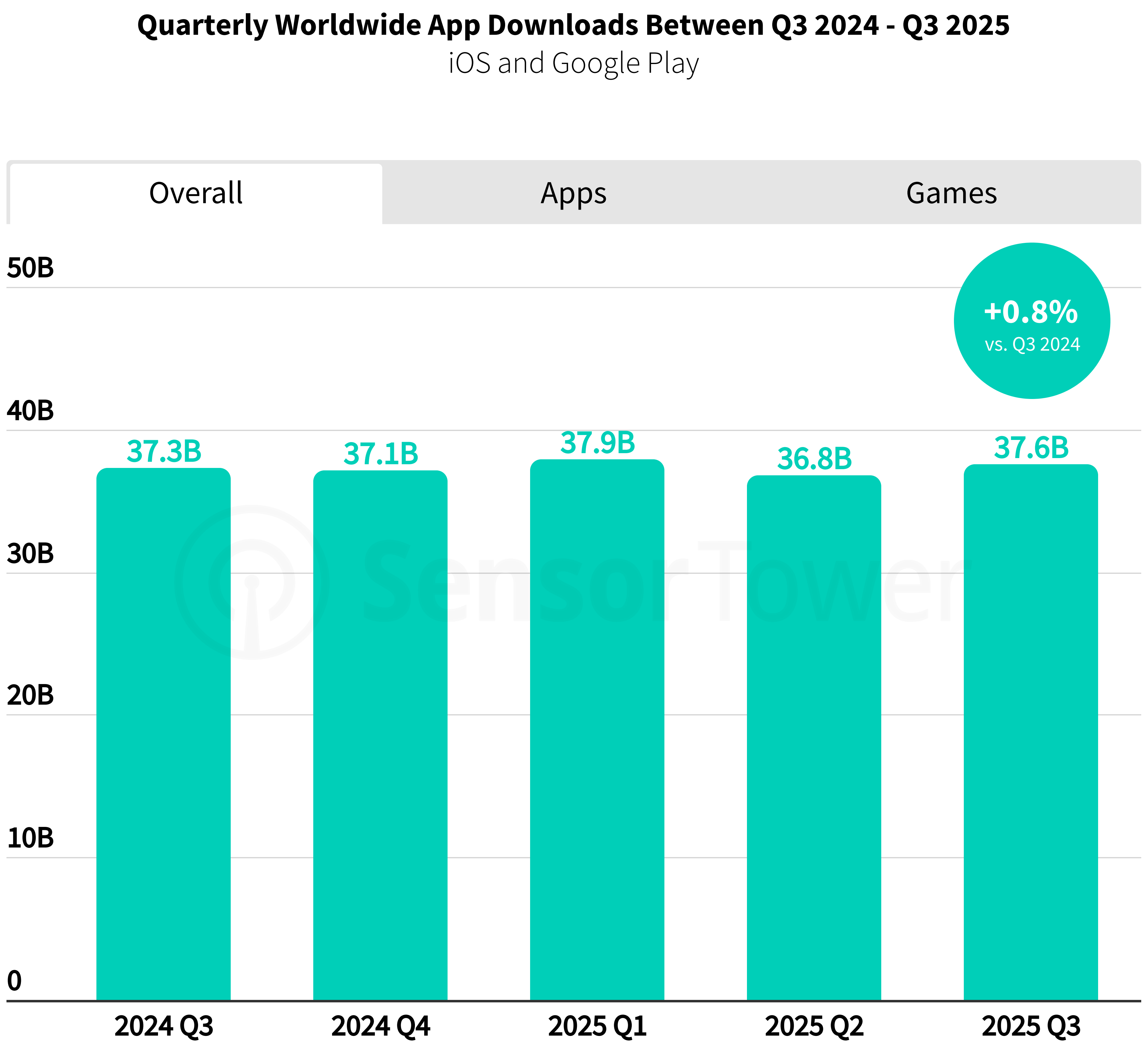
Non-Game Downloads Continue to Soar, Boosted by AI

Global app downloads have remained stable over the past five quarters, consistently hovering right around 37-38 billion per quarter. Q3 2025 was no exception, recording 37.6 billion downloads.

This overall trend, however, hides a divergence between games and non-games over the same period. Non-game downloads climbed 5.5% and have maintained solid growth in recent years following the pandemic, partially boosted by new categories like AI Assistants.

Games, on the other hand, have seen downloads steadily decline from their early 2020 pandemic peak. While download figures remain higher than pre-pandemic levels, privacy regulations have made finding the right gaming audience more difficult (and advertising less lucrative). (and advertising less lucrative).

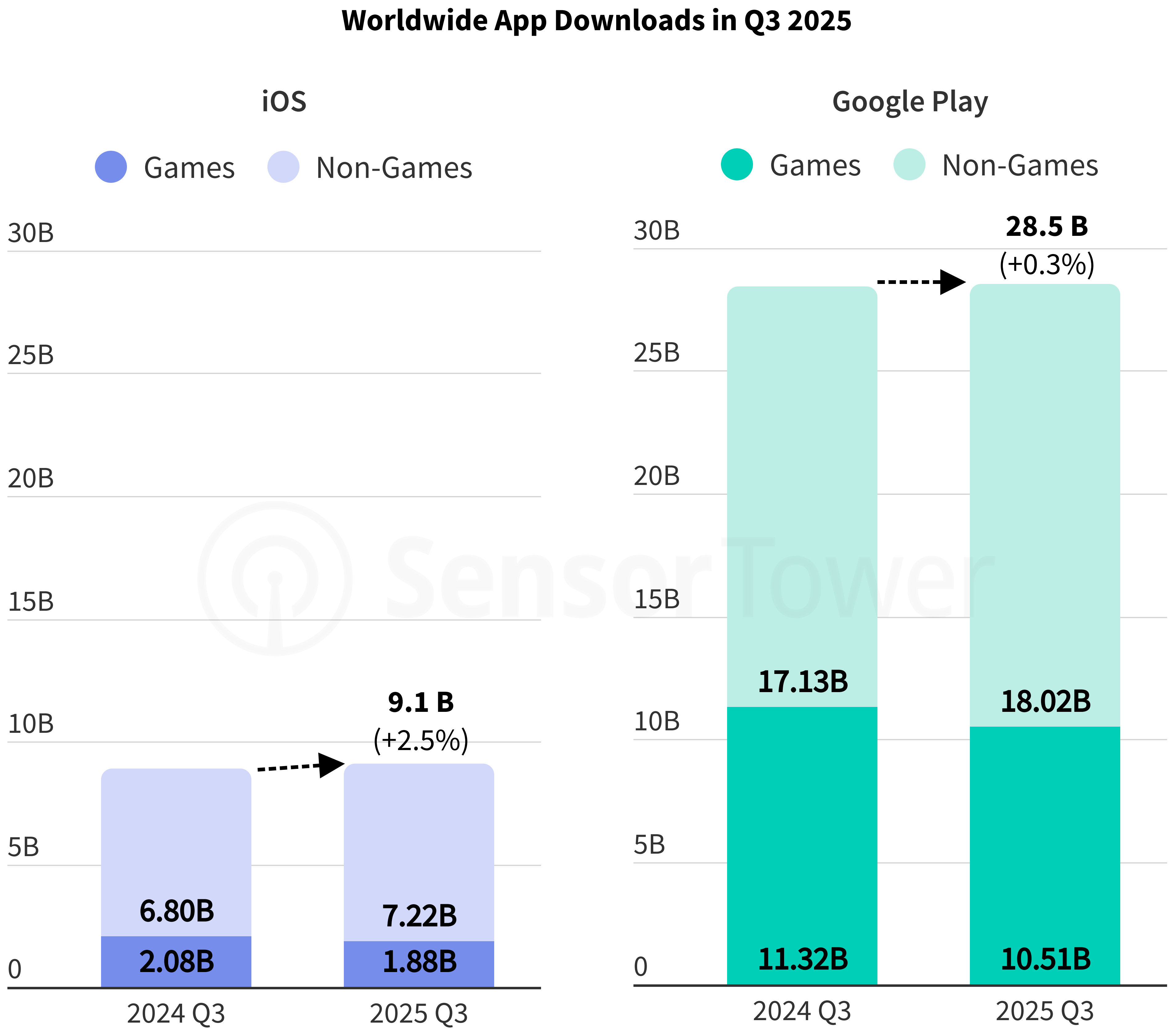
Source: Sensor Tower
Note: iOS and Google Play combined. iOS only for China. Excludes third-party Android.



Google Play Still Dominates Downloads While iOS Had Higher Growth

The platform breakdown for downloads is essentially the opposite of revenue: Google Play dominates in terms of download volume, while iOS recorded higher growth.

Google Play is particularly dominant when it comes to mobile game downloads. While Google Play's non-game downloads outnumber those on iOS by a factor of 2.5 to 1, its game downloads are even more commanding, outpacing iOS game downloads by 5.6 to 1.



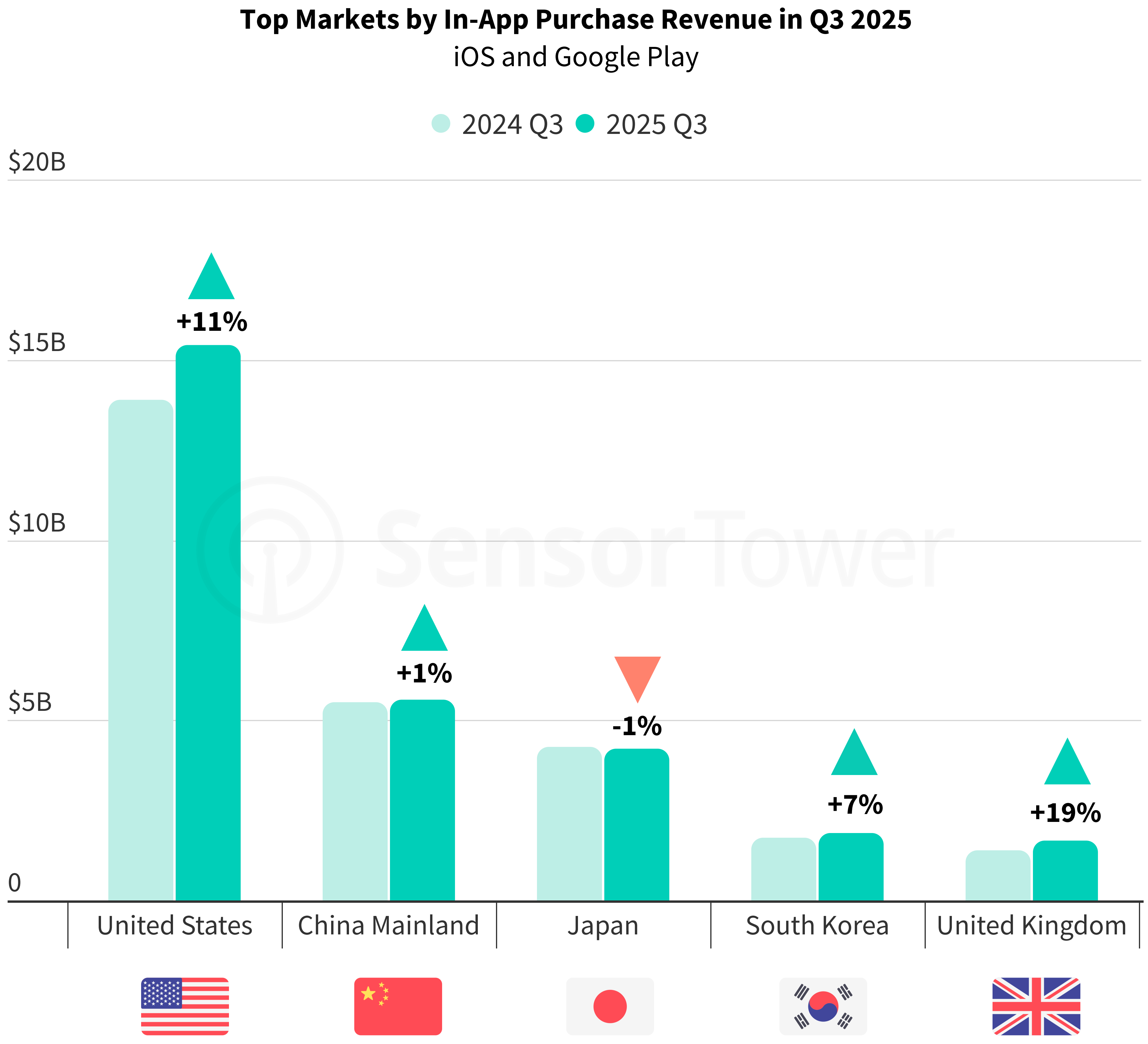
Source: Sensor Tower
Note: iOS and Google Play combined. iOS only for China. Excludes third-party Android.

Q3 2025:
Top Markets

IAP Revenue in the US Surpassed $15 Billion in Q3 2025

The United States is the premier market for IAP revenue on mobile, generating more revenue than the next five markets combined. Strong revenue growth was also observed across Europe, with the United Kingdom serving as a key example.

Notably, Japan was the only market among the top 20 by IAP revenue to see a YoY decline, albeit a modest one. This was largely due to games making up such a substantial portion of the market there. Conversely, non-game revenue in Japan still demonstrated strong growth, rising 13% YoY.



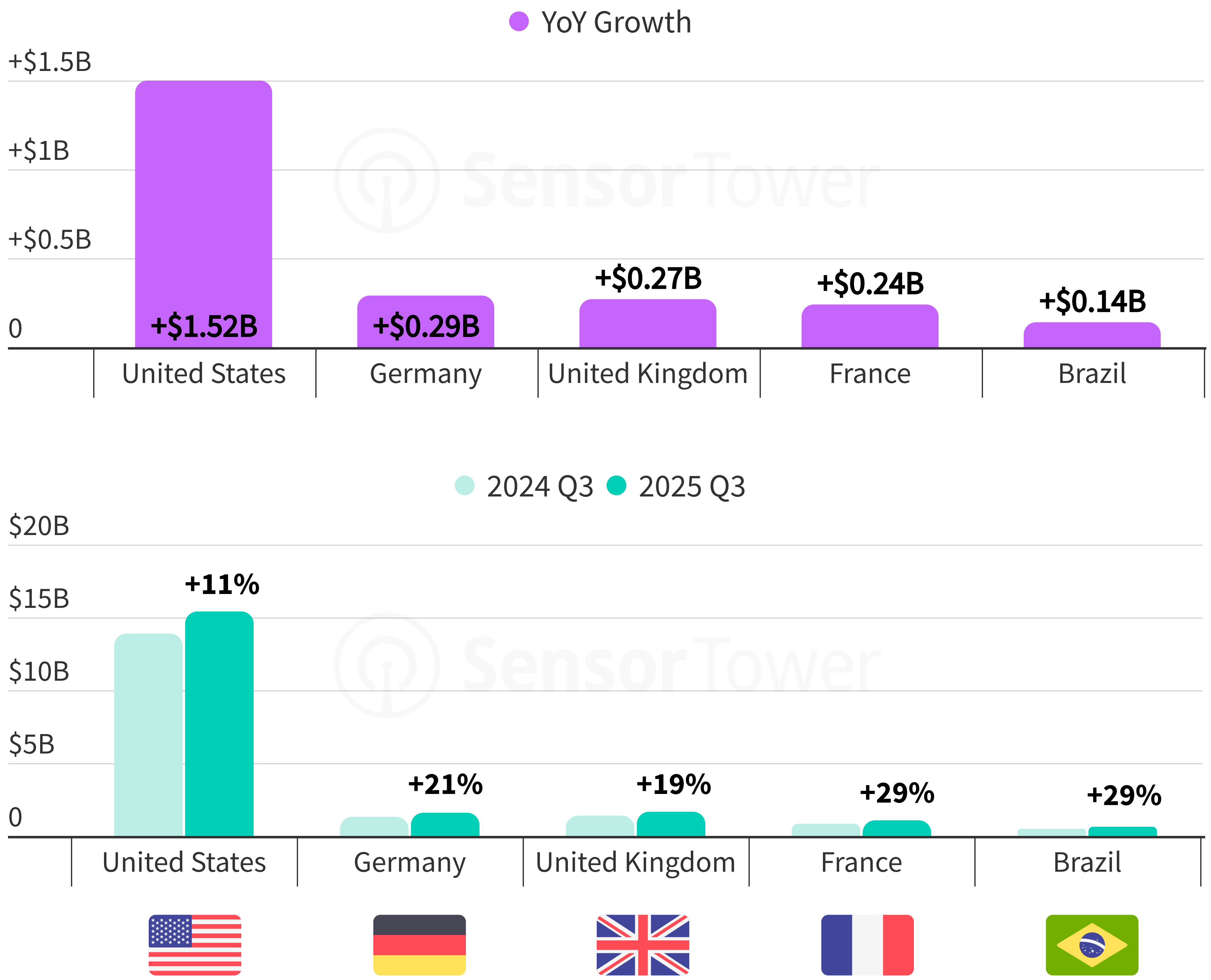
Source: Sensor Tower
Note: iOS and Google Play combined. iOS only for China. Revenue is gross — inclusive of any percent taken by the app stores.

The Mobile Market is Booming in Western Europe and Latin America

The United States led individual countries by adding $1.5 billion in IAP revenue growth from Q3 2024 to Q3 2025. Europe also emerged as a significant growth region in Q3 2025, with Germany, the UK, and France adding a combined $800 million in revenue YoY.

Latin America is a key region to watch as we approach the end of 2025. Brazil's revenue climbed 29% YoY, the fastest growth rate among any market in the top 20 by revenue.

Top Breakout Markets by Year-over-Year In-App Purchase Revenue Growth in Q3 2025
iOS and Google Play

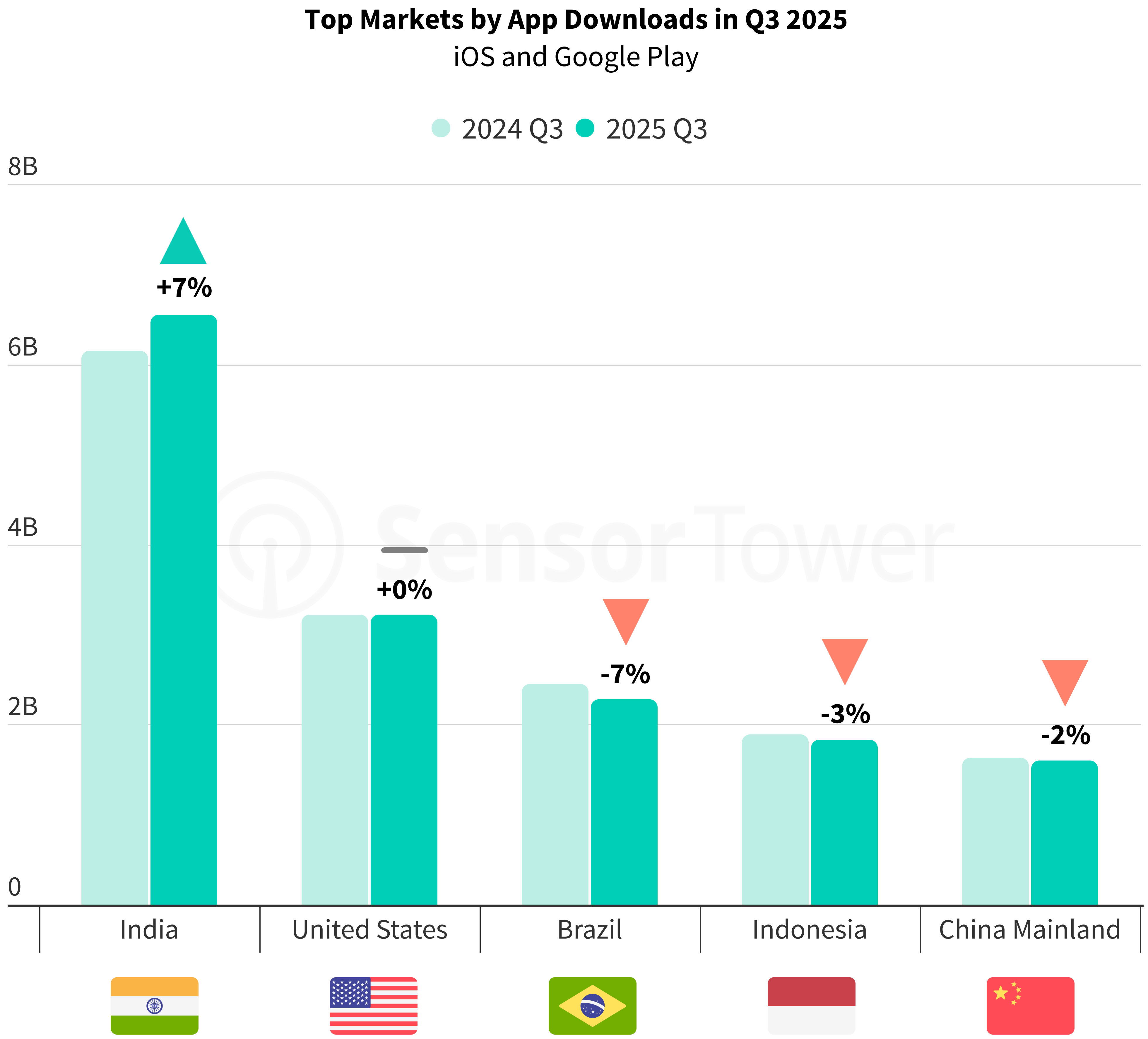


Source: Sensor Tower
Note: iOS and Google Play combined. iOS only for China. Revenue is gross — inclusive of any percent taken by the app stores.

India Had its Best Quarter for Downloads in More than Two Years

India, the top global market for app downloads, saw a strong rebound in Q3 2025. It surpassed 6.5 billion downloads for the first time since Q2 2023, driven by rapid growth in categories like Food & Dining Services and Jobs & Education, alongside the stabilization of the mobile gaming market.

Meanwhile, downloads remained flat in the United States and declined in other top markets. As many mobile consumers already possess the apps they need, app developers are increasingly shifting their focus toward improving existing services rather than driving new installs.



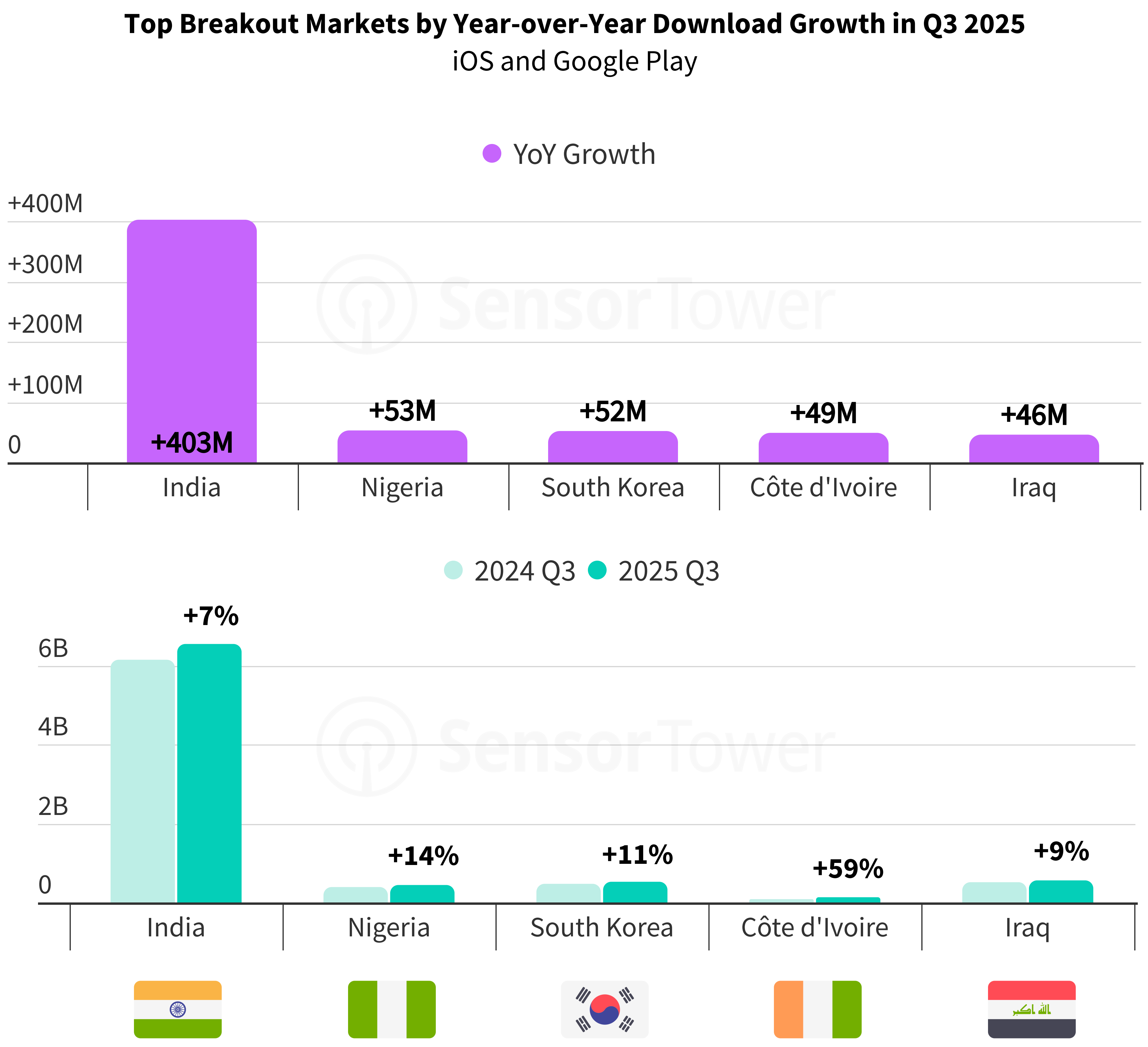
Source: Sensor Tower
Note: iOS and Google Play combined. iOS only for China. Excludes third-party Android.

Pockets of Growth are Available Across the Globe

While India's sheer scale meant its 7% YoY growth resulted in 400 million additional downloads compared to Q3 2024—a far bigger gain than any other market—pockets of growth emerged elsewhere.

A few other markets managed to gain around 50 million additional downloads over the past year, including markets in Africa (Nigeria and Cote d'Ivoire), Asia (South Korea), and the Middle East (Iraq).

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



Q3 2025:
Top Categories

Media & Entertainment Leads Mobile Revenue While Software Apps Drive Growth

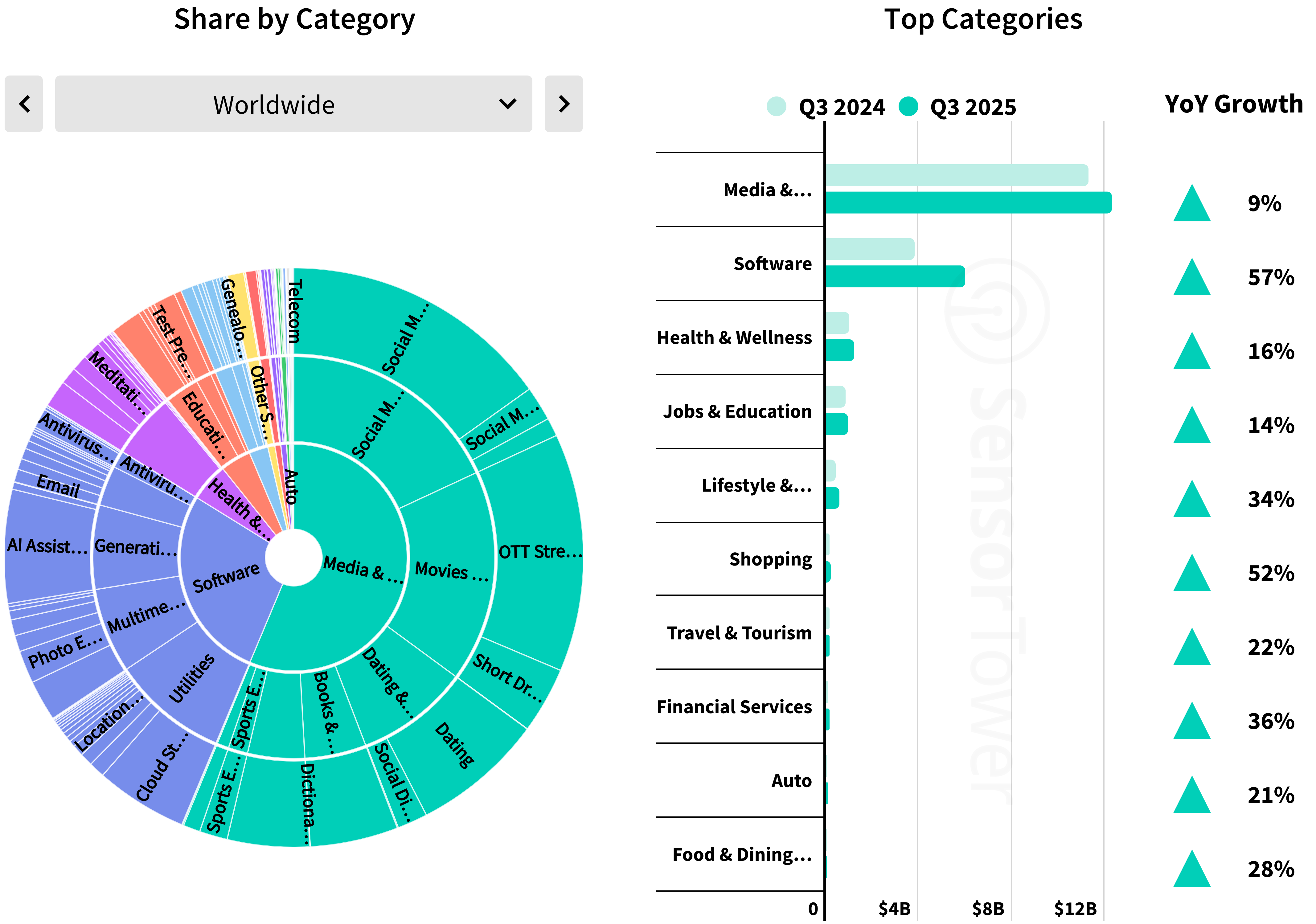
The mobile revenue surge across non-games is nearly universal: each of the top categories saw positive YoY growth, with many genres surging by 20% or more. Media & Entertainment led the way with 56% of all non-game spend, led by Social Media (18% of non-game spend), Movies & TV Shows (17%), and Dating & Social Discovery (9%).

Generative AI is still making rapid gains, with consumers spending nearly $1.5 billion on Generative AI apps (up from $400 million in Q3 2024). Generative AI accounted for nearly 7% of all non-game revenue in Q3 2025, compared to just 2% a year prior.

While no other subgenre group rivaled Generative AI's growth, other fastest-growing verticals included Utilities and Social Media.

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. Apps classified by Sensor Tower's App IQ Taxonomy as of November 1, 2025.

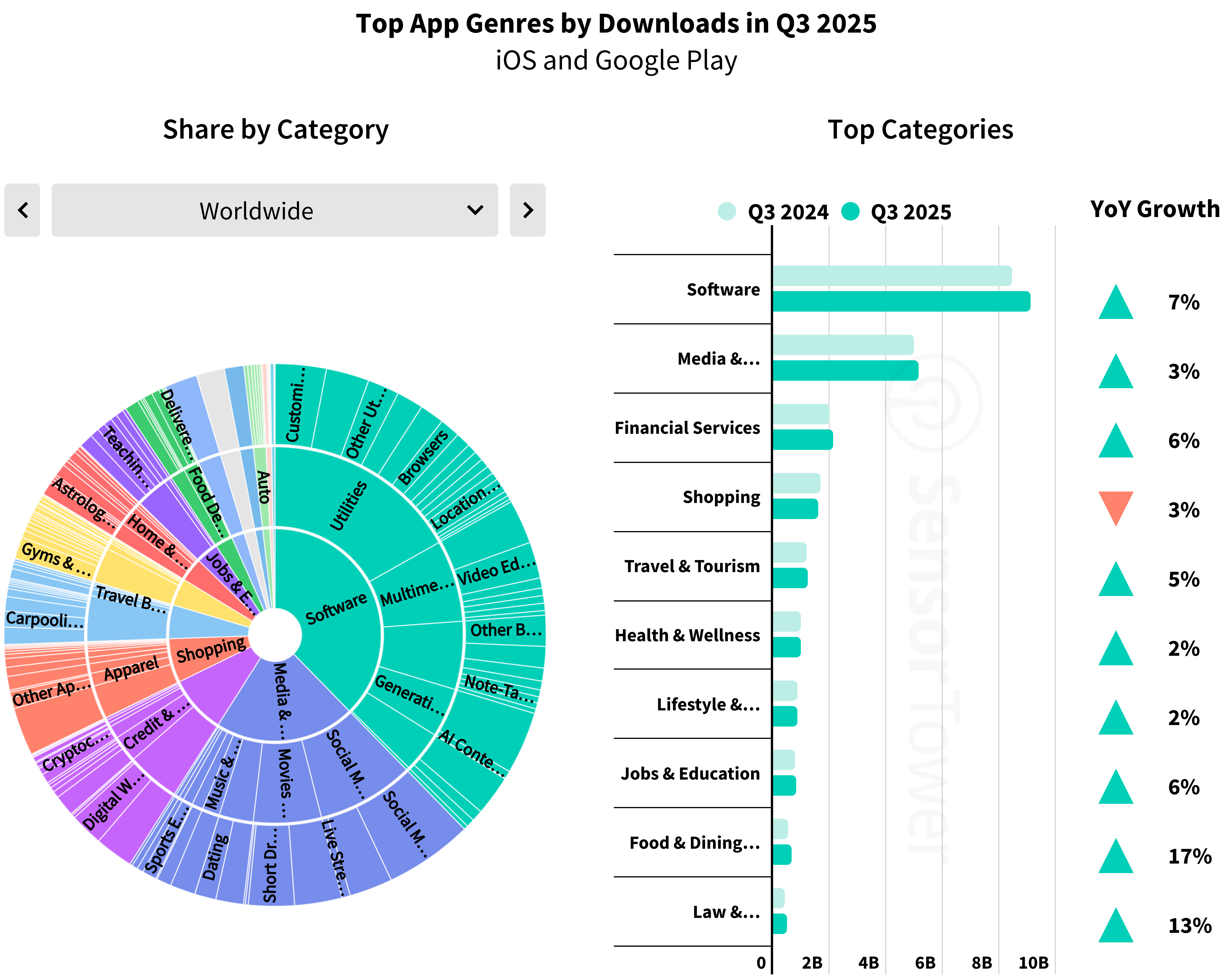
Top App Genres by In-App Purchase Revenue in Q3 2025
iOS and Google Play



Nine of the Top 10 App Genres Saw Positive Growth as Markets Stabilize

The non-game market is gaining momentum again after a few years of slow growth, as the market corrected from the pandemic-related surge. AI is also providing a significant boost, including Generative AI apps, as well as apps across other verticals, from Business & Productivity Software to Multimedia & Design Software and Education & Training.

Shopping was the only genre among the top 10 to see a YoY decline in downloads. This was largely due to some of the top retail apps, such as Temu and SHEIN, shifting away from larger markets like the US as tariff policies added new frictions.



Source: Sensor Tower
Note: iOS and Google Play combined. iOS only for China. Excludes third-party Android. Apps classified by Sensor Tower's App IQ Taxonomy as of November 1, 2025.

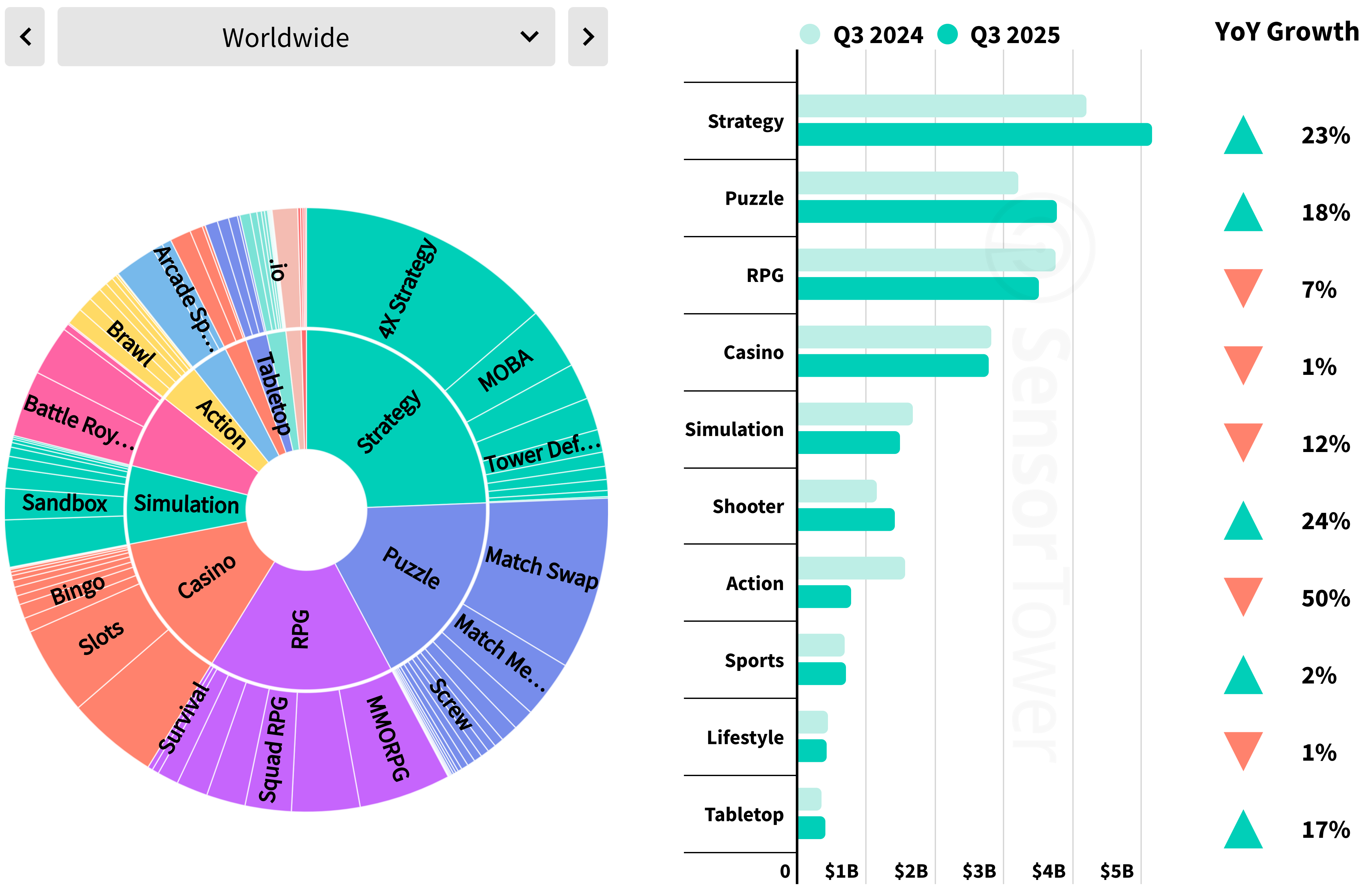
Strategy and Puzzle Games Lead Revenue Opportunities on Mobile

The mobile gaming market has shifted over the past few years, with Strategy and Puzzle games providing better revenue opportunities compared to RPGs. This shift is partially due to declining markets where RPGs are most popular, such as Japan and South Korea.

The fastest-growing games in Q3 2025 included several top Strategy titles: Kingshot (4X Strategy), Clash Royale (Real-Time Strategy), and Last Z: Survival (4X Strategy). Puzzle games also claimed two of the top 10 games by QoQ growth with Gossip Harbor (Match Merge 2) and Royal Kingdom (Match Swap).

Top Game Genres by In-App Purchase Revenue in Q3 2025
iOS and Google Play

Share by Game Genre / Subgenre **Top Game Genres**



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 November 1, 2025.

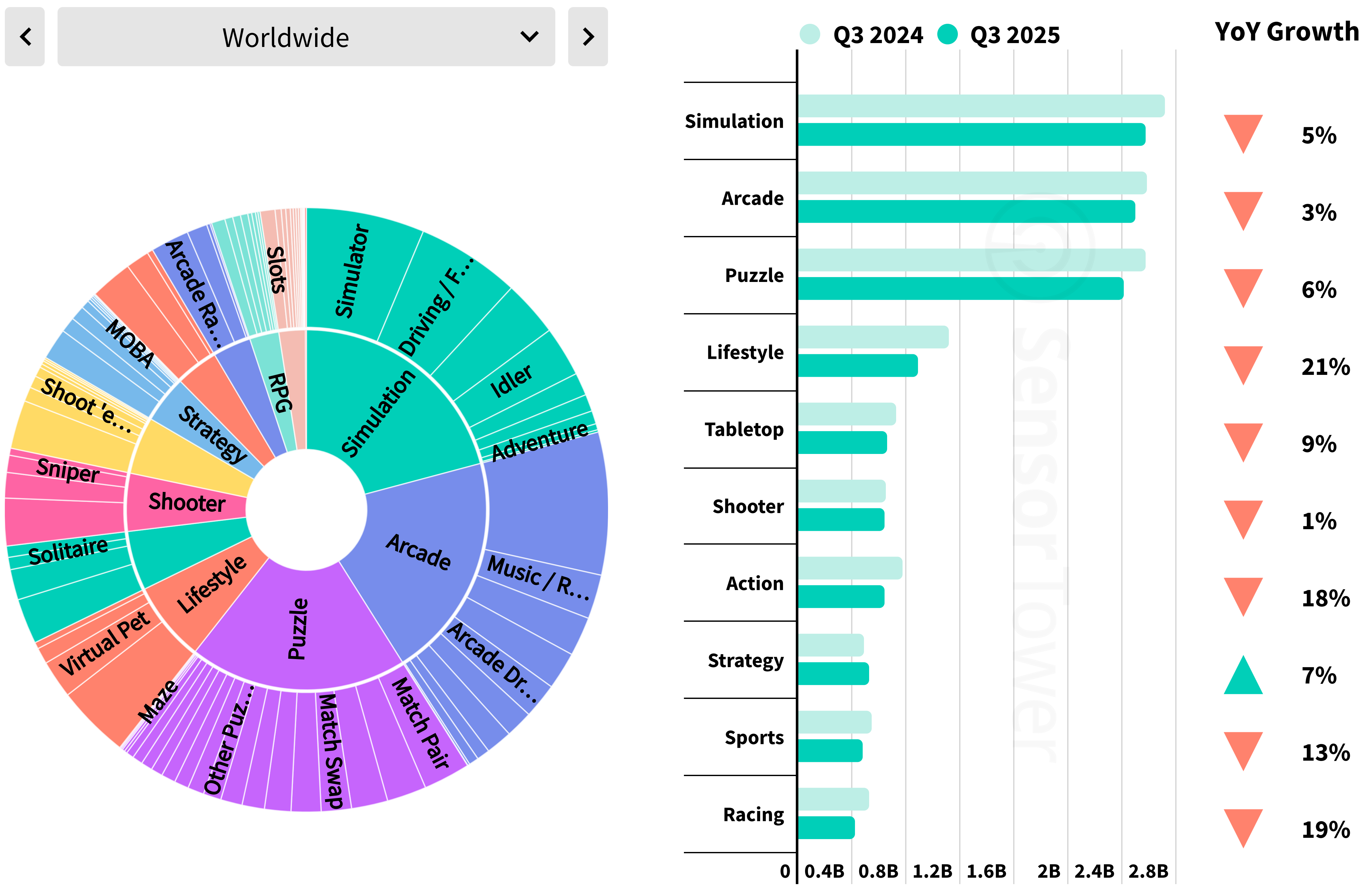
Simulation, Puzzle, and Arcade Genres Drive New Downloads

Strategy was the only game genre to see downloads increase YoY, as game developers compete for the genre's climbing revenue. This increase included both established and new titles. Top games by QoQ download growth included Clash Royale from Supercell, as well as recently launched games like Tiles Survive from FunPlus.

While casual game downloads continued to decline, these genres still drive the majority of demand on mobile. Simulation, Puzzle, and Arcade games each accounted for approximately 20% of total mobile game downloads, led by enduring hits like Roblox (Simulation), Block Blast (Puzzle), and Subway Surfers (Arcade).

Top Game Genres by Downloads in Q3 2025

iOS and Google Play



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 November 1, 2025.

Q3 2025:
Top Apps

Can ChatGPT Become the Top Grossing App in the World?

ChatGPT has quickly flown up the top charts, ranking #2 by IAP revenue in Q3 2025, just behind TikTok. To put this into perspective, it ranked #16 only a year ago. It still has a way to go to catch TikTok, but its current trajectory suggests this is certainly possible.

The top five apps by downloads remained the same as last quarter, with ChatGPT and TikTok leading Meta's top three apps. Google Gemini ranked just outside the top five, driven by a huge September in which it ranked only behind ChatGPT in downloads.

Top Apps in Q3 2025
iOS and Google Play

Worldwide

In-App Purchase Revenue

Rank	Change	App
1	=	TikTok
2	▲ 2	ChatGPT
3	▼ 1	Google One
4	▼ 1	YouTube
5	▲ 1	Tinder Dating App
6	▼ 1	Disney+
7	=	HBO Max
8	=	CapCut
9	=	LinkedIn
10	=	WeTV

Downloads

Rank	Change	App
1	=	ChatGPT
2	=	TikTok
3	=	Instagram
4	=	Facebook
5	=	WhatsApp Messenger
6	▲ 12	Google Gemini
7	▼ 1	Temu
8	▼ 1	CapCut
9	▼ 1	Telegram
10	▲ 1	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 (Q2 2025).

AI and Short Drama Dominated the Breakout Rankings in Q3 2025

Similar to last quarter, many of the top breakout apps by downloads were either AI or Short Drama apps. AI Assistants took the top four spots by QoQ download growth, including significant pushes from Perplexity and Seekee. Short Drama also claimed four of the top 10 apps by growth, led by QuickTV and DramaBox.

Streaming, particularly driven by the National Football League (NFL) season, fueled revenue growth in Q3 2025. The NFL season is a massive driver for the streaming market in the United States. Peacock TV, which hosts Sunday night football streaming and access to the NFL Channel, and the NFL app both climbed into the top five by QoQ revenue growth.

Top Breakout Apps by Growth in Q3 2025 vs. Q2 2025
iOS and Google Play

Worldwide

In-App Purchase Revenue

Breakout Rank	Current Quarter Rank	Change	App Name
1	2	▲ 2	ChatGPT
2	3	▼ 1	Google One
3	8	=	CapCut
4	11	▲ 2	Peacock TV
5	66	▲ 72	NFL
6	13	▲ 2	Snapchat
7	38	▲ 9	Strava
8	45	▲ 15	Dramawave
9	109	▲ 223	FlareFlow
10	78	▲ 36	Goodnotes

Downloads

Breakout Rank	Current Quarter Rank	Change	App Name
1	6	▲ 12	Google Gemini
2	22	▲ 140	Perplexity
3	1	=	ChatGPT
4	43	▲ 106	Seekee
5	83	▲ 484	QuickTV
6	15	▲ 4	DramaBox
7	94	▲ 556	Sony LIV
8	58	▲ 148	Crafto
9	157		Story TV
10	173		Pick Drama

Source: Sensor Tower
Note: iOS and Google Play combined. iOS only for China. Excludes third-party Android
Change is vs. the previous quarter (Q2 2025).

Q3 2025:
Top Games

Who Achieved Mobile Game Royalty in Q3 2025?

"Kings" were a popular theme among the top games by IAP revenue, including two new entrants to the top 10 this quarter: Clash Royale and Kingshot. Kingshot from Century Games joined two other top 4X Strategy games in the top 10, including the overall leader, Last War: Survival, and another Century Games title, Whiteout Survival. Monopoly GO, the #2 game by revenue, became the fastest game ever to reach $5 billion in all-time revenue earlier this year.

The download charts were also similar to last quarter, with a few new entrants to the top 10 like Tile Explorer and Vita Mahjong. Royal Kingdom was a notable entrant into the top 10 as well, as Dream Games looks to capture some of the massive success seen from its other Match Swap game, Royal Match.

Source: Sensor Tower
Note: iOS and Google Play combined. iOS only for China. Excludes third-party Android
Change is vs. the previous quarter (Q2 2025).

Top Games in Q3 2025
iOS and Google Play

Worldwide

In-App Purchase Revenue

Rank	Change	App
1	=	Last War:Survival
2	▲ 3	MONOPOLY GO!
3	=	Whiteout Survival
4	=	Royal Match
5	▼ 3	Honor of Kings
6	=	Candy Crush Saga
7	=	Coin Master
8	▲ 14	Clash Royale
9	▲ 1	Roblox
10	▲ 19	Kingshot

Downloads

Rank	Change	App
1	▲ 2	Roblox
2	=	Garena Free Fire
3	▼ 2	Block Blast!
4	=	Subway Surfers
5	▲ 1	Pizza Ready!
6	▼ 1	Ludo King
7	▲ 33	Tile Explorer
8	▲ 5	Vita Mahjong
9	▼ 1	Hole.io
10	▲ 14	Royal Kingdom

Mobile Games Breakouts: Old Meet New

Clash Royale and Kingshot reflect how both old and new titles can find success in 2025. Supercell has invested more in its existing titles, such as Clash Royale, in recent years, while Kingshot is a rapidly rising 4X Strategy game launched earlier in 2025. Delta Force from Tencent was another fast riser on mobile, earning more than $180 million in Q3 2025 (nearly all of which was generated in China).

Eight of the top 10 games by download growth represent the Lifestyle & Puzzle game class, including genres like Lifestyle (My Talking Tom Friends 2), Simulation (Roblox), and Puzzle (Tile Explorer). The two exceptions were Clash Royale (Strategy) and Monster Shooter (Shooter).

Source: Sensor Tower
Note: iOS and Google Play combined. iOS only for China. Excludes third-party Android
Change is vs. the previous quarter (Q2 2025).

Top Breakout Games by Growth in Q3 2025 vs. Q2 2025
iOS and Google Play

Worldwide

In-App Purchase Revenue

Breakout Rank	Current Quarter Rank	Change	App Name
1	10	▲ 19	Kingshot
2	8	▲ 14	Clash Royale
3	15	▲ 39	Delta Force
4	9	▲ 1	Roblox
5	25	▲ 40	Last Z
6	31	▲ 49	Umamusume: Pretty Derby
7	12	▼ 1	Gossip Harbor
8	22	▲ 17	Royal Kingdom
9	40	▲ 84	DRAGON BALL Z DOKKAN BATTLE
10	62	NEW	Vampir

Downloads

Breakout Rank	Current Quarter Rank	Change	App Name
1	12	▲▲▲	My Talking Tom Friends 2
2	1	▲ 2	Roblox
3	69	NEW	Prison Master: Escape Journey
4	18	▲ 113	Clash Royale
5	7	▲ 33	Tile Explorer
6	78	▲ 990	Monster Shooter
7	109	NEW	Steal n Catch the Brainrot
8	108	▲▲▲	Block Crush!
9	102	▲▲▲	Magic Fashion
10	81	▲ 578	Kpop Piano Beats

Q3 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 Market Insights team using Pathmatics by Sensor Tower Digital Advertising Insights.

The figures mentioned in this report reflect estimated ad investments made by advertisers through September 30, 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 United States Digital Advertising Market Scaled Up

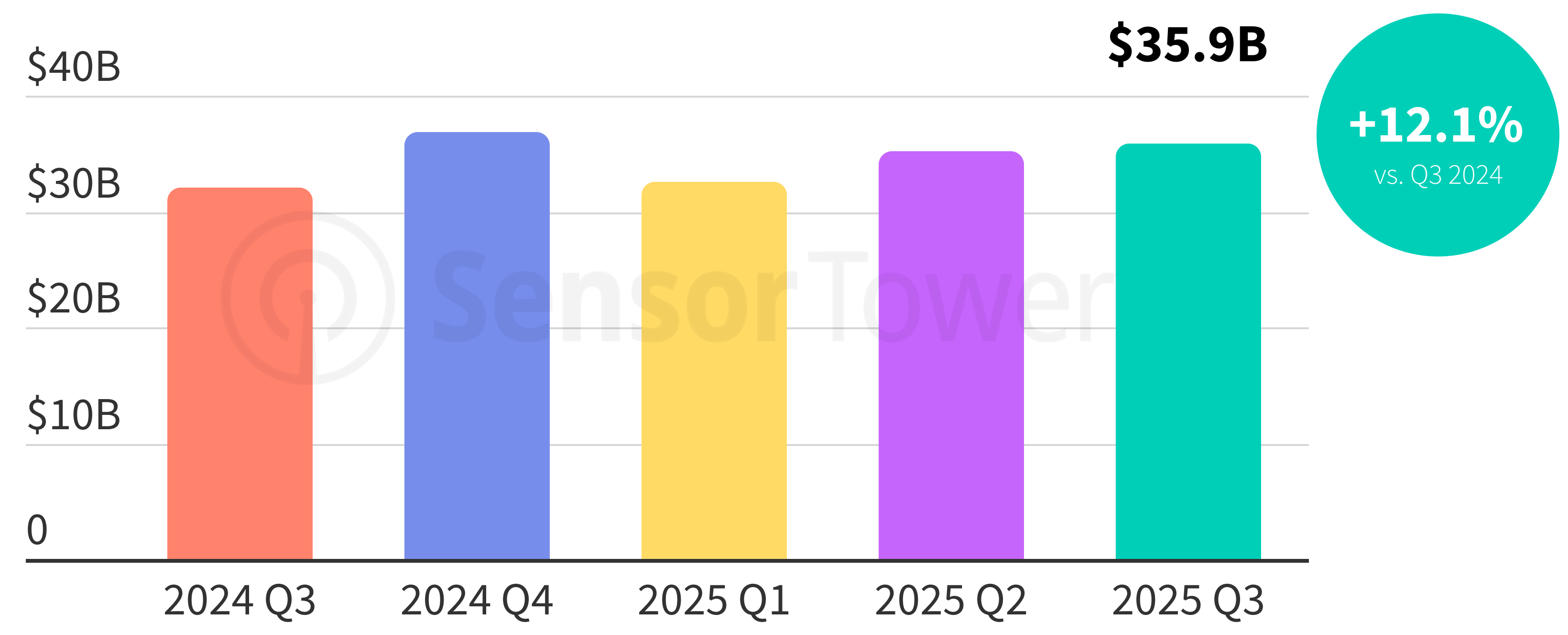
Digital ad spend in the United States reached $36 billion in Q3 2025 and 4 trillion impressions, with strong YoY growth of 12% for spend and 8% for impressions. The digital ad market demonstrates sustained growth, as ad impressions surpassed the volume of the typically higher Q4 peak, when advertising traditionally peaks around the holiday season. Note that US advertising now includes in-app advertising!

The top markets by digital ad spend growth included South Korea (+20% YoY), Brazil (+18%), and France (+18%). Please note that the included ad channels vary by market.

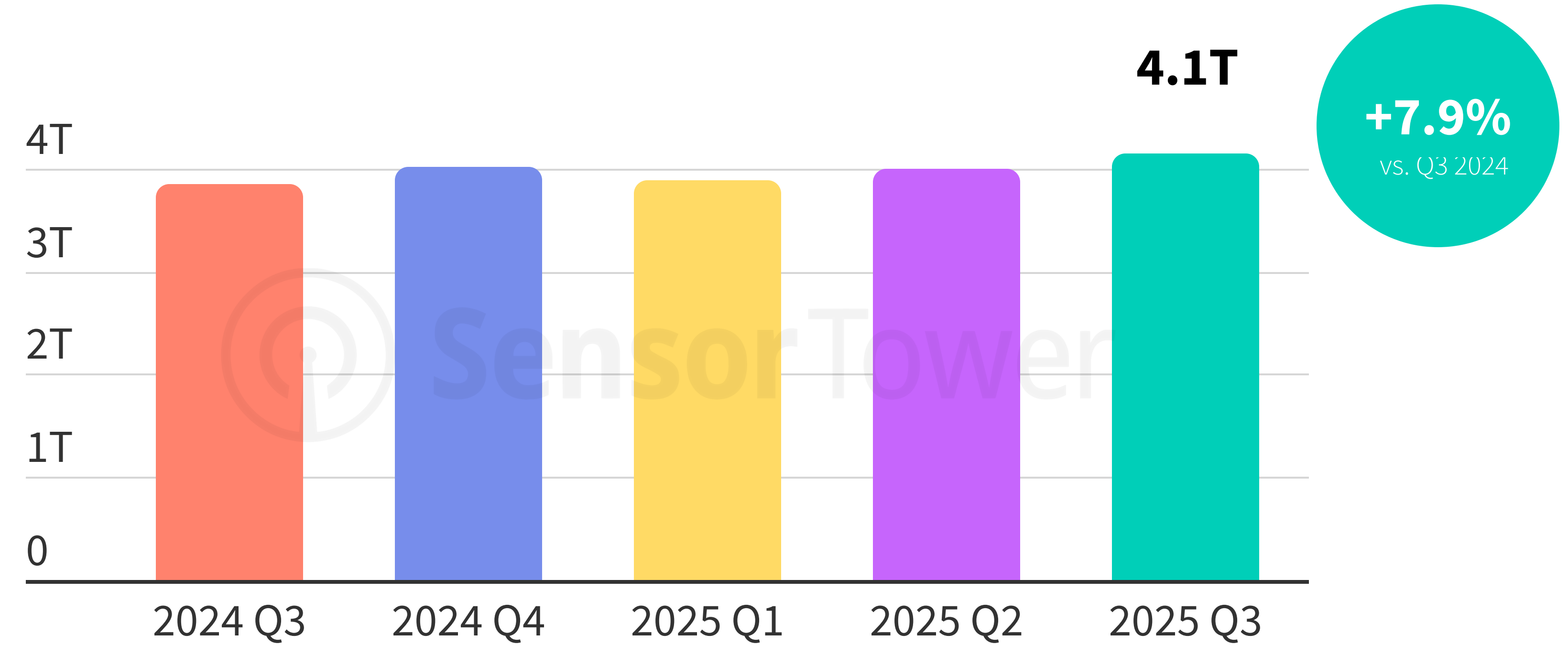
Source: Sensor Tower
Note: Includes a selection of advertising channels. Ad spend estimates as of November 6, 2025. Available ad channels vary by market. See *[Appendix (page 44)]* *for a list of ad channels included in each market.*

United States

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	✓
LINE	○
LinkedIn	✓
NAVER	○
Pinterest	✓
Reddit	✓
Snapchat	✓
TikTok	✓
X	✓
YouTube	✓
Desktop Display	✓
Desktop Video	✓
Mobile Apps	✓
Mobile Display	✓
Mobile Video	○
OTT	✓

Social Remained the Primary Focus for Digital Advertisers

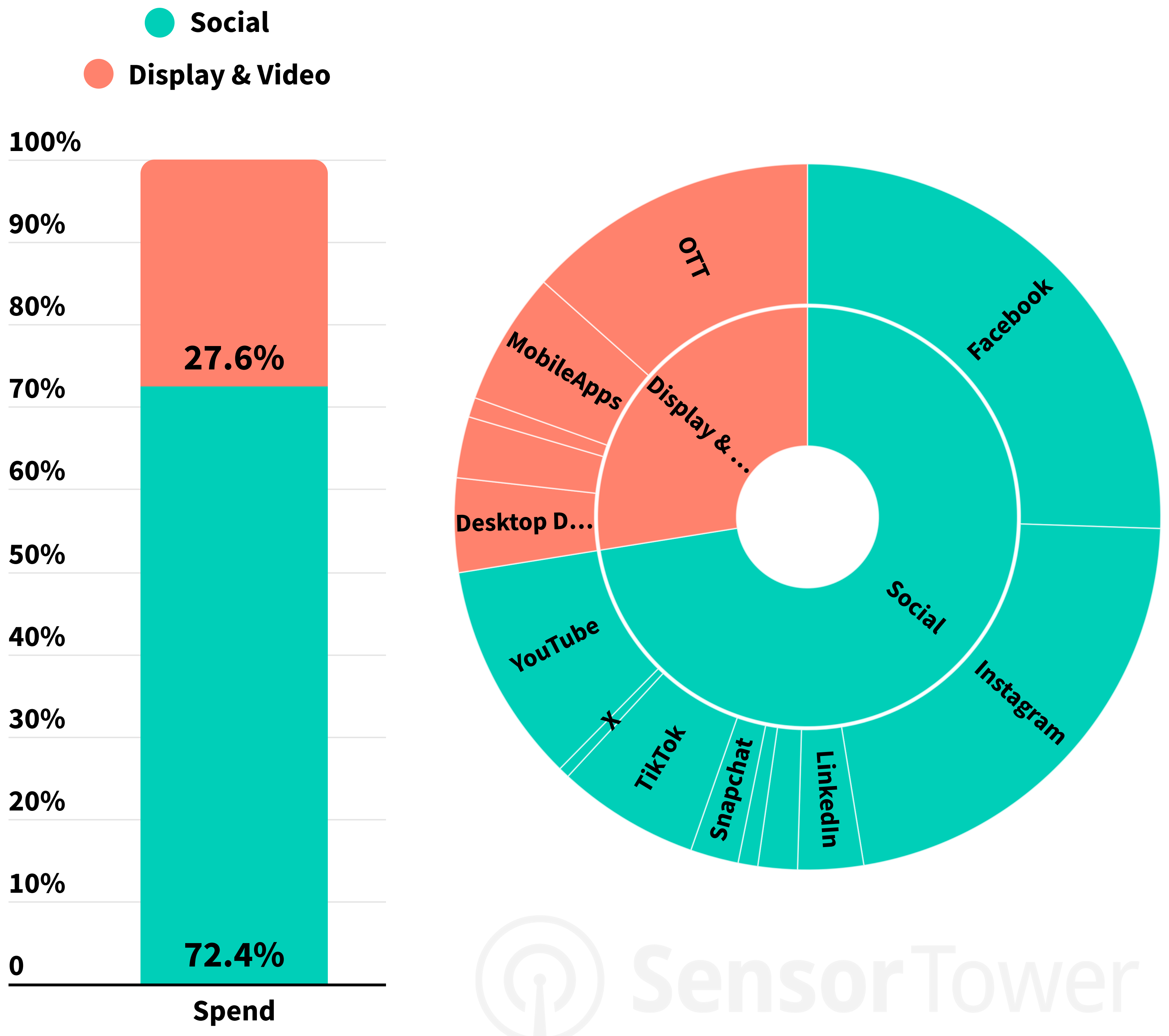
Among included digital ad channels in the US, social networks account for 72% of ad spend, led by Meta's channels. Facebook and Instagram alone accounted for nearly 47% of all spend, followed by YouTube (10%) and TikTok (6.5%).

Among non-social digital ad channels in the US, OTT was the largest, accounting for 13% of US ad spend in Q3 2025, followed by Mobile Apps (6%). Notably, Mobile Apps ad spend grew at a faster rate than social media over the past year, climbing 42% YoY. (compared to 11% for social media)

Source: Sensor Tower
Note: Includes a selection of advertising channels. Ad spend estimates as of November 6, 2025. Available ad channels vary by market. See *Appendix (page 44)* *for a list of ad channels included in each market.*

Share of Digital Ad Spend by Channel in Q3 2025

United States



Included Ad Channels

Only select ad channels are available in each market

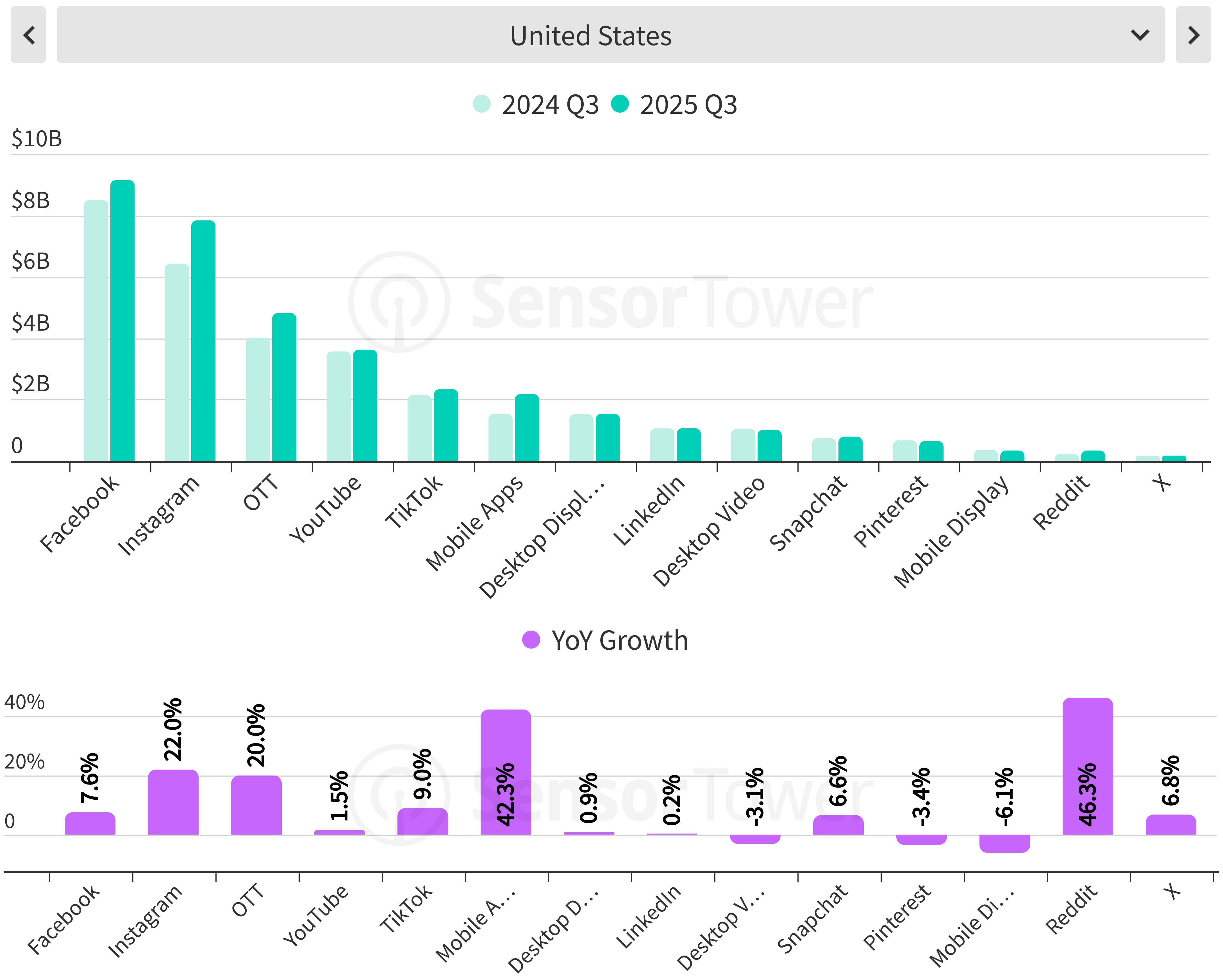
Ad Channel	Included?
Facebook	✓
Instagram	✓
LINE	○
LinkedIn	✓
NAVER	○
Pinterest	✓
Reddit	✓
Snapchat	✓
TikTok	✓
X	✓
YouTube	✓
Desktop Display	✓
Desktop Video	✓
Mobile Apps	✓
Mobile Display	✓
Mobile Video	○
OTT	✓

Reddit and Mobile Apps were Among the Fastest Growing Ad Channels in the US

Reddit (46% YoY) and Mobile Apps (42% YoY) were the fastest-growing ad channels in Q3 2025. While Reddit remains small in total spend, its accelerated growth demonstrates its rising value to advertisers. If the high growth of Mobile Apps continues, it could potentially surpass TikTok's ad spend in the near future. Mobile Apps includes a variety of ad networks like AdMob, InMobi, Meta Audience Networks, and Unity.

For Mobile Apps, the fastest growth was driven by the Financial Services (+83% YoY) and Software (+56% YoY) categories. For Reddit, growth was led by Media & Entertainment (+71% YoY) and Health & Wellness (+66% YoY) brands.

Year-over-Year Digital Ad Spend Growth by Channel in Q3 2025



Source: Sensor Tower
Note: Includes a selection of advertising channels. Ad spend estimates as of November 6, 2025. Available ad channels vary by market. See Appendix (page 44) for a list of ad channels included in each market.

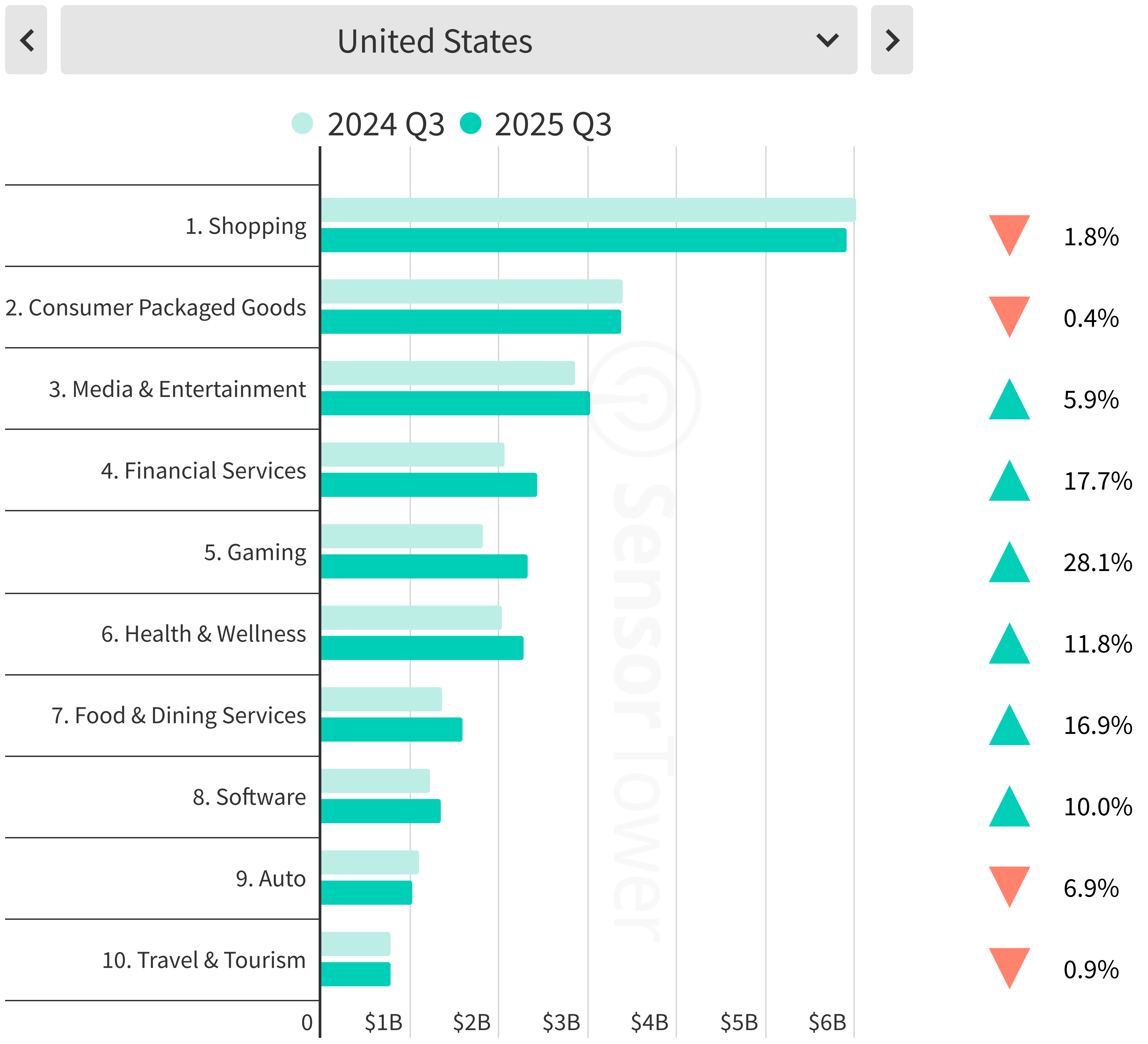
US Shopping Ad Spend Continued its Decline

The Shopping category continued its decline, recording a consistent YoY drop in ad spend across the first three quarters of 2025. This downturn was compounded by the new tariff regime, which forced key Chinese-backed retailers, Temu and SHEIN, to execute a prior-quarter pullback. However, these companies haven't abandoned the market just yet, increasing their ad budgets more than 100% QoQ to significantly bounce back from the tariff shock.

Meanwhile, the Gaming category was the fastest growing category by US digital ad spend in Q3 2025, increasing 28% YoY and for the first time entering the top five spending categories. As mobile game revenue neared its pandemic peak (page 8), companies are competing for this increasingly large market.

Source: Sensor Tower
Note: Includes a selection of advertising channels. Ad spend estimates as of November 6, 2025. Available ad channels vary by market. See Appendix (page 44) for a list of ad channels included in each market.

Top Categories by Digital Ad Spend in Q3 2025



Included Ad Channels

Only select ad channels are available in each market

Ad Channel	Included?
Facebook	✓
Instagram	✓
LINE	
LinkedIn	✓
NAVER	
Pinterest	✓
Reddit	✓
Snapchat	✓
TikTok	✓
X	✓
YouTube	✓
Desktop Display	✓
Desktop Video	✓
Mobile Apps	✓
Mobile Display	✓
Mobile Video	
OTT	✓

Top Advertiser P&G Leans on OTT to Win Back-to-School Season

The top four advertisers (Amazon, Procter & Gamble, Walt Disney, and Comcast) remained in the top four each of the past three quarters. Notably, P&G increased its ad spend by a significant 34% QoQ, strategically aiming at the Back-to-School (BTS) shopping season.

In Q3 2025, P&G heavily invested on OTT channels, with a 58% QoQ surge in spending. According to Sensor Tower Audience Insights, Cord Cutters are nearly two times as likely to fit the "parent" persona than the general population, making OTT the most efficient channel for P&G to reach its primary household shopper during the key Q3 purchasing window.

Source: Sensor Tower
Note: Includes a selection of advertising channels. Ad spend estimates as of November 6, 2025. Available ad channels vary by market. See *Appendix (page 44)* *for a list of ad channels included in each market.*

Top Advertisers by Digital Ad Spend in Q3 2025

United States

Rank	Advertiser	Change vs. 2025 Q2
1	Amazon.com	=
2	Procter & Gamble	▲ 1
3	The Walt Disney Company	▼ 1
4	Comcast Corporation	=
5	Google	▲ 3
6	Walmart Inc.	▲ 4
7	Nestle	▲ 6
8	Adobe Systems	▲ 1
9	Verizon Communications Inc.	▲ 8
10	The Coca-Cola Company	▲ 9

Included Ad Channels

Only select ad channels are available in each market

Ad Channel	Included?
Facebook	✓
Instagram	✓
LINE	○
LinkedIn	✓
NAVER	○
Pinterest	✓
Reddit	✓
Snapchat	✓
TikTok	✓
X	✓
YouTube	✓
Desktop Display	✓
Desktop Video	✓
Mobile Apps	✓
Mobile Display	✓
Mobile Video	○
OTT	✓

Auto Insurers Surge Ad Spend Amid Record Consumer Shopping

The implementation of new tariffs on vehicles and parts in 2025 led to higher auto insurance rates, prompting an increasing number of customers in the market to search for better deals. Capitalizing on this opportunity, Liberty Mutual and Geico significantly ramped up their US ad spend on Auto Insurance in Q3 2025 by 205% and 316% QoQ, respectively, to capture these actively switching customers.

In the mobile gaming space, Dream Games continues to set the benchmark for user acquisition scale, holding the spot of No. 1 gaming advertiser for two consecutive quarters and remaining a top breakout advertiser overall.

Source: Sensor Tower
Note: Includes a selection of advertising channels. Ad spend estimates as of November 6, 2025. Available ad channels vary by market. See *Appendix (page 44)* *for a list of ad channels included in each market.*

Top Breakout Advertisers by Digital Ad Spend Growth in Q3 2025 vs. Q2 2025

United States

Rank	Advertiser	Rank in 2025 Q3	Change vs. 2025 Q2
1	Procter & Gamble	2	▲ 1
2	Google	5	▲ 3
3	SheIn Group Limited	26	▲ 40
4	General Mills	34	▲ 65
5	Liberty Mutual Insurance Company	11	▲ 10
6	Geico	20	▲ 26
7	The Kraft Heinz Company	37	▲ 59
8	AT&T	19	▲ 11
9	The Coca-Cola Company	10	▲ 9
10	Dream Games	17	▲ 9

Included Ad Channels

Only select ad channels are available in each market

Ad Channel	Included?
Facebook	✓
Instagram	✓
LINE	
LinkedIn	✓
NAVER	
Pinterest	✓
Reddit	✓
Snapchat	✓
TikTok	✓
X	✓
YouTube	✓
Desktop Display	✓
Desktop Video	✓
Mobile Apps	✓
Mobile Display	✓
Mobile Video	
OTT	✓

Q3 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]

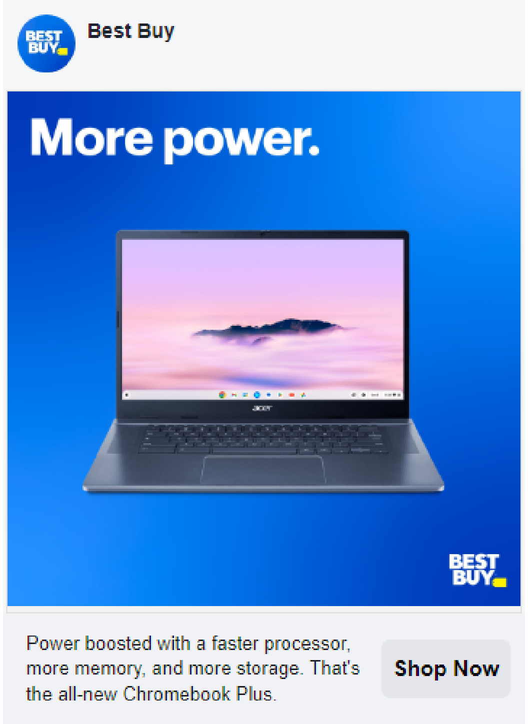
Retailer: Target

Advertiser: Hasbro

Retailer: Chewy

Advertiser: Purina PetCare

Retailer: Best Buy



Advertiser: Google

Retailer: Home Depot

Advertiser: Behr Paint Company

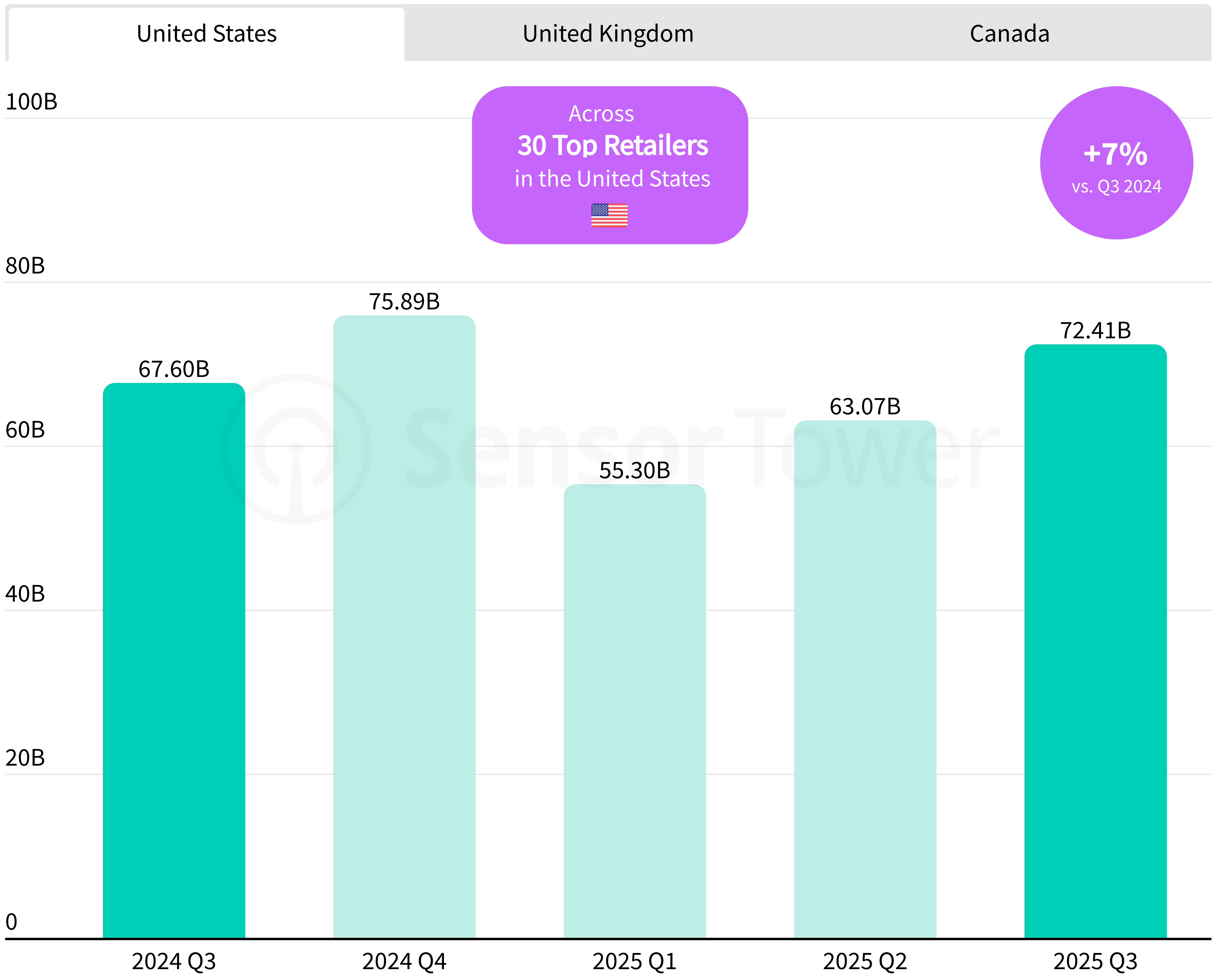
Retail Media Networks Maintain Strong Growth Momentum

Retail media ad impressions in the US climbed 7% YoY to 72 billion across top retailers like Walmart and Target. Note that Amazon.com has been excluded from this chart since data is available in Sensor Tower starting January 1, 2025.

Among the top US retailers, Walmart experienced a significant 22% drop in ad impressions YoY. This trend contrasts sharply with the positive growth seen at competitors Target (+16%) and Best Buy (+27%).

Source: Sensor Tower
Note: Includes a selection of top retailers. Amazon is available since January 1, 2025 and is excluded from this chart. See Appendix (page 45) for list of retailers included in each market.

Retail Media Ad Impressions in the United States, United Kingdom, and Canada



Amazon is Surpassing All Rivals Combined in US Retail Media Impressions

Amazon had over 80 billion retail media impressions in Q3 2025, surpassing the other 30 included retailers combined. The majority (71%) of Amazon's impressions being onsite, displayed directly on Amazon.com.

The other top retailers, including Walmart and Target, generate the bulk of their ad impressions through offsite channels (with Facebook being a key platform), prioritizing audience extension and customer acquisition outside their owned properties.

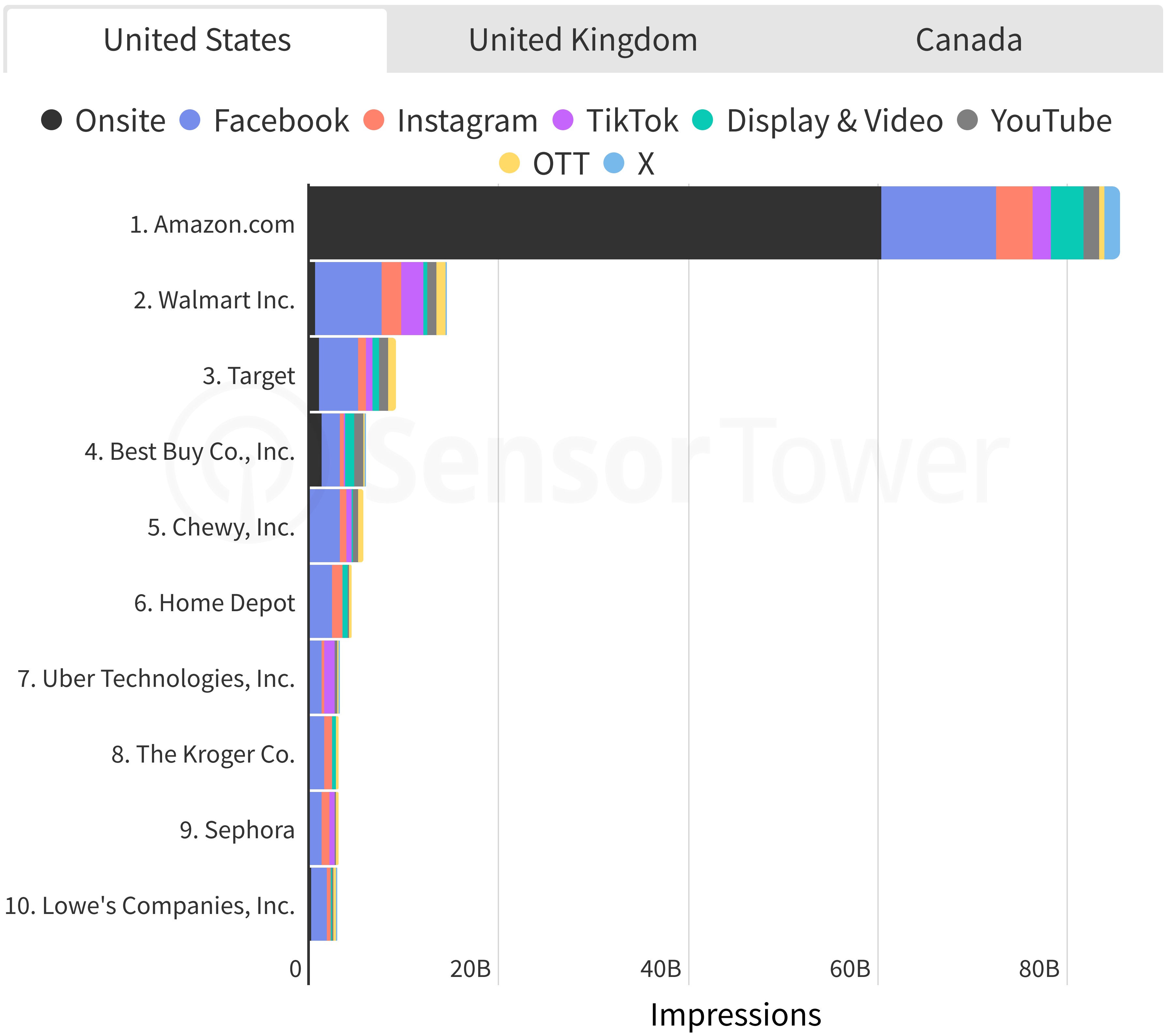
Definitions:

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. See *Appendix (page 45)* *for list of retailers included in each market.*

Top Retail Media Retailers by Impressions
Q3 2025



Personal Care is the Most Competitive Retail Media Category

With more than 12 billion impressions in the US, Personal Care was the most popular category for retail media in Q3 2025, following by Home and Garden (more than 10 billion impressions).

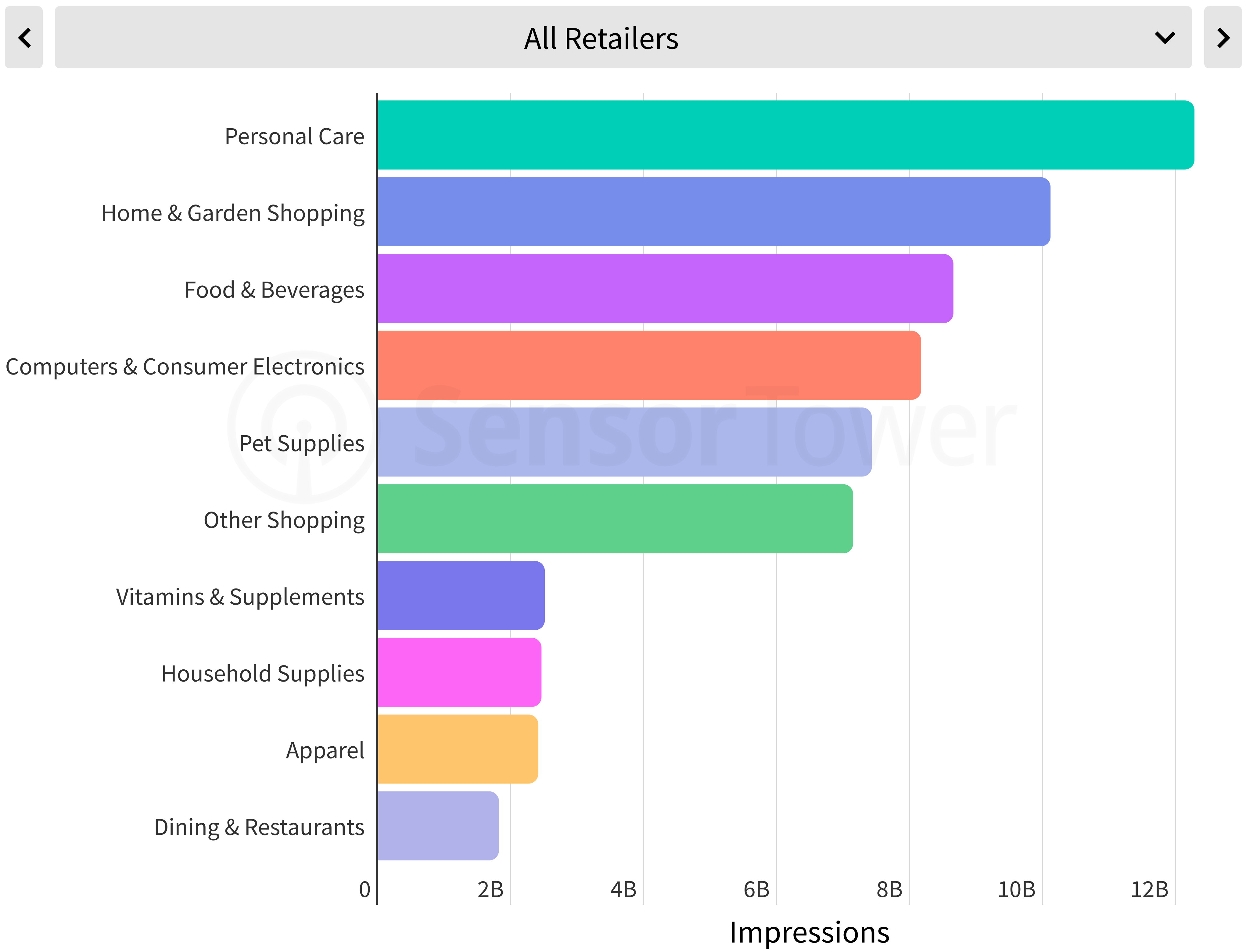
Personal Care remained within the top 3 categories on top retail media networks (RMNs), accounting for 23% share of retail media ad impressions on Target, 17% on Amazon, and 12% on Walmart.

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 or advertising for retailer's own products. See *Appendix (page 45)* *for list of retailers included in each market.*

Top Categories by Retail Media Advertising Impressions in the United States
Q3 2025



Amazon is Advertiser's Top RMN Choice Across Categories

Amazon was the top option for retail media across eight of the top 10 categories, with Walmart also a strong player, ranking among the top three retailers for five of the 10.

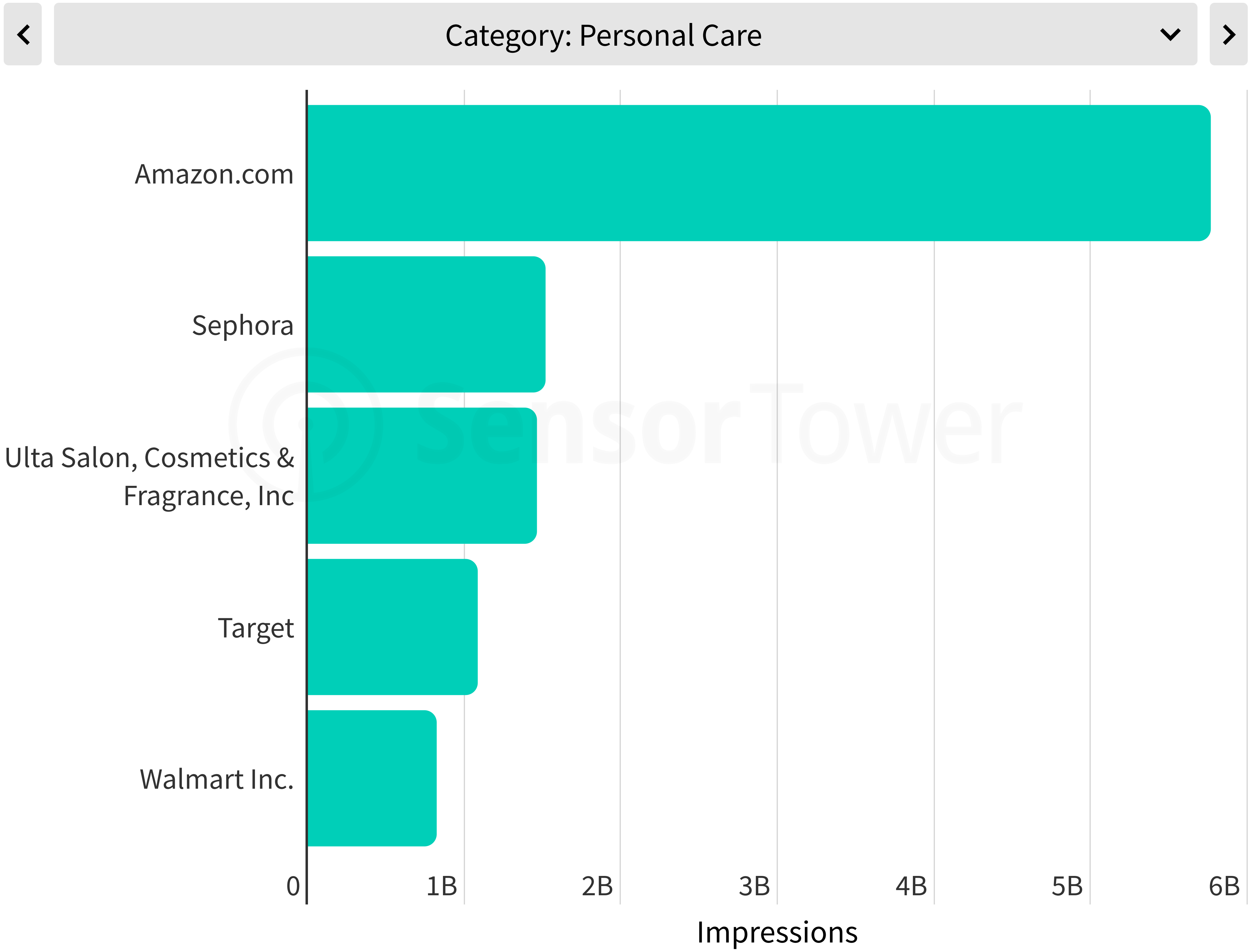
While Amazon holds broad appeal and maintains its vast reach, other RMNs have been significant contributors by capturing specific, high-intent verticals, such as Chewy for pet supplies, Home Depot for home and garden, and Uber for dining and restaurants.

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 or advertising for retailer's own products. See Appendix (page 45) for list of retailers included in each market.

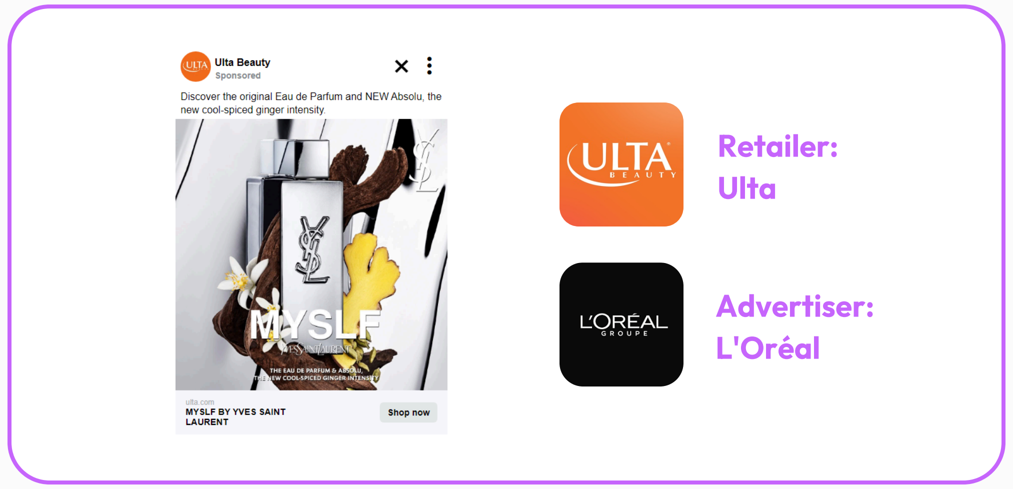
Top Retail Media Retailers by Category in the United States
Q3 2025



L'Oréal Dominate Niche RMNs While Competitors Prioritize Amazon Scale

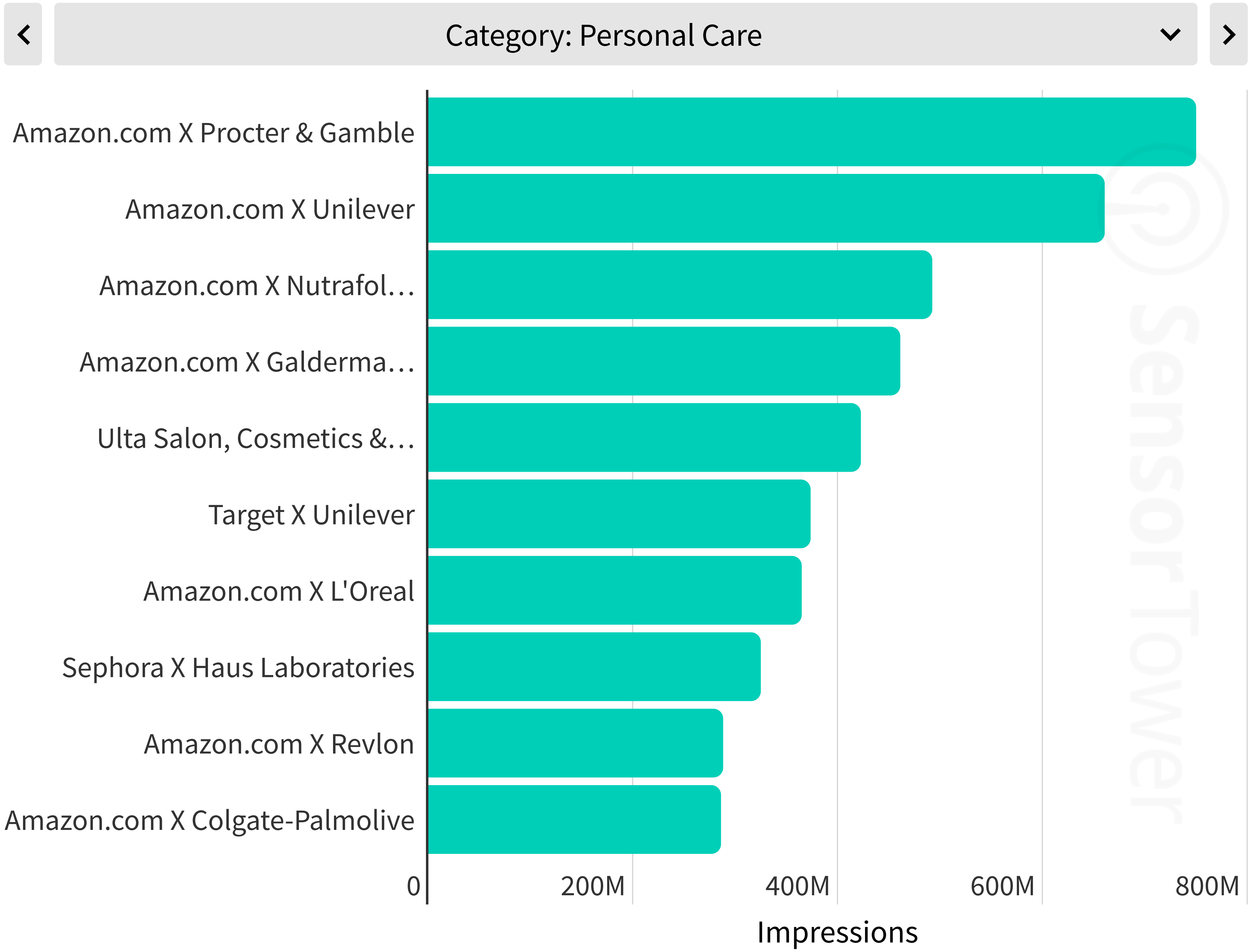
In Q3 2025, many of the top retailer/advertiser combinations by US impressions included Amazon.

While Amazon is the most popular RMN for Personal Care, commanding the majority of the top co-branded spots, L'Oréal and Unilever heavily invest with other retailers (Ulta and Target, respectively) to capture shopper segments outside of Amazon's ecosystem. The L'Oréal campaign held 29% of all Personal Care ad impressions on Ulta, and the Unilever campaign commands 34% on Target.



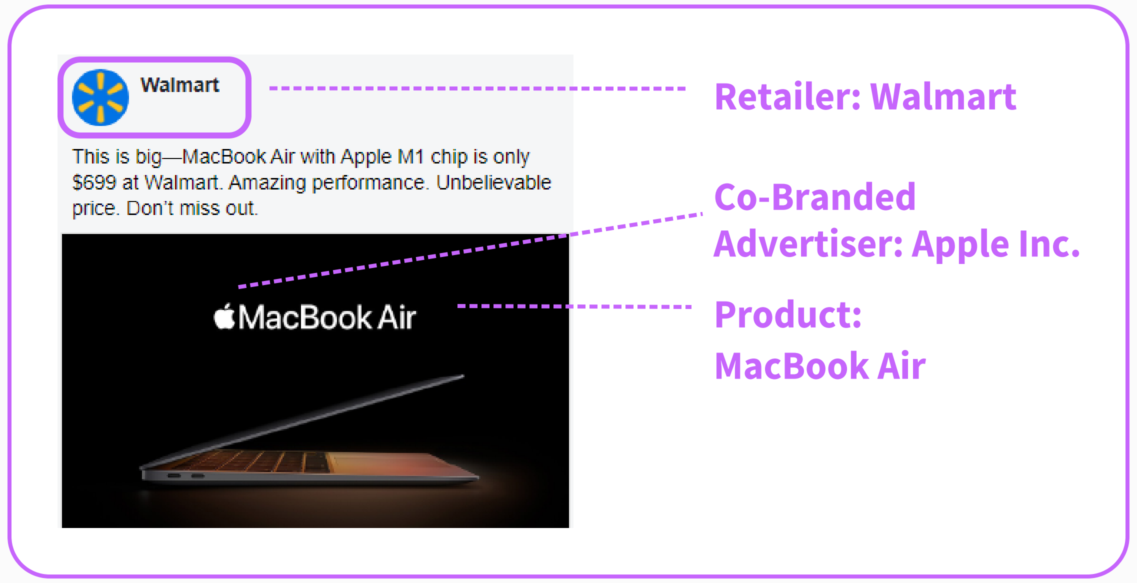
Source: Sensor Tower
Note: Includes a selection of top US retailers. Excludes cases when the advertisers are not currently tracked by Sensor Tower or advertising for retailer's own products. See *Appendix (page 45)* *for list of retailers included in each market.*

Top Co-Branded Retailer / Advertiser Combinations in the United States
Q3 2025



Dig Deeper into Co-Branded Advertising Partnerships and Opportunities

Consumer packaged goods brands advertise specific products to match the retailer's core demographic. For instance, P&G uses Amazon's RMN to target the high-value buyer with its premium Oral-B iO Electric Toothbrush line, while reserving high-frequency, family necessities like Tide Pods for Target and Pampers Swaddlers for Walmart.



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
Q3 2025

Retailer: Amazon.com

Rank	CoBranded Advertiser	Top Product	Example Creative
1	Unilever	Liquid IV Hydration Multiplier	Banner
2	Procter & Gamble	Oral-B iO Electric Toothbrush	Banner
3	Nestle	Nestle	Banner
4	Google	Pixel Phones (all)	Banner
5	Samsung	Samsung Gaming Monitors	Video
6	Galderma Laboratories, L.P.	Cetaphil Gentle Foaming Cleanser	Banner
7	Nutrafol (Nutraceutical Wellness, Inc.)	Nutrafol Women's Balance	Banner
8	Otter Products, LLC	OtterBox Phone Accessories	Banner
9	Newell Brands Inc.	Rubbermaid Commercial Products	Banner
10	L'Oreal	You Fragrances by Emporio Armani	Video

Appendix A: 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	India	Italy	Japan	Mexico	New Zealand	South Korea	Spain	United Kingdom
Facebook	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Instagram	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
LINE	○	○	○	○	○	○	○	○	★	○	○	○	○	○
LinkedIn	✓	○	✓	✓	✓	✓	○	○	○	○	○	○	○	✓
NAVER	○	○	○	○	○	○	○	○	○	○	○	✓	○	○
Pinterest	✓	✓	✓	✓	✓	✓	✓	✓	○	✓	○	○	✓	✓
Reddit	✓	✓	✓	✓	✓	✓	✓	✓	○	○	○	○	✓	✓
Snapchat	✓	✓	○	✓	✓	✓	✓	✓	○	○	○	○	✓	✓
TikTok	✓	✓	✓	✓	✓	✓	○	✓	✓	✓	○	✓	✓	✓
X	✓	○	✓	○	○	○	✓	○	✓	○	○	○	✓	✓
YouTube	✓	✓	✓	✓	✓	✓	★	✓	✓	✓	✓	★	✓	✓
Desktop Display	✓	✓	○	✓	○	✓	○	○	○	○	✓	○	○	✓
Desktop Video	✓	✓	○	✓	○	✓	○	○	○	○	✓	○	○	✓
Mobile Apps	✓	○	○	✓	○	✓	○	○	✓	○	○	✓	○	✓
Mobile Display	✓	✓	○	✓	○	✓	○	○	○	○	✓	○	○	✓
Mobile Video	○	✓	○	○	○	○	○	○	○	○	○	○	○	○
OTT	✓	○	○	○	○	○	○	○	○	○	○	○	○	○

Appendix B: Included Retail Media Retailers by Market

Retail media advertising data include select retailers in each market. Figures in this report represent the totals for these retailers only, not across all retailers in the market.

- Most of the analysis in this report focuses on the most recent quarter. However, for the analysis covering retail media impressions over time by market, any retailers that only have partial data available are excluded. For example, Amazon data coverage in the United States began January 1, 2025, so it is excluded from the year-over-year analysis (page 36).
- Category and advertiser analyses exclude cases when the advertisers are not currently tracked by Sensor Tower or advertising for retailer's own products.

Included Retail Media Retailers by Market

Key: ✓ Included retailer ★ Recently added retailer (only included in select slides)

United States | United Kingdom | Canada

Retailer		Retailer		Retailer	
Ace Hardware	✓	Five Below	✓	Publix Super Markets	✓
Ahold Delhaize	✓	General Nutrition Corporation (GNC)	✓	Sam's West (Sam's Club)	✓
Albertsons Companies Inc.	✓	Home Depot	✓	Sephora	✓
Amazon.com	★	Hy-Vee, Inc.	✓	Seven & i Holdings Co., Ltd.	✓
Best Buy Co., Inc.	✓	Instacart (Maplebear Inc.)	✓	Target	✓
Chewy, Inc.	✓	Lowe's Home Centers, Inc.	✓	The Kroger Co.	✓
Costco Wholesale Corp	✓	Macy's, Inc.	✓	Uber Technologies, Inc.	✓
CVS Health	✓	Meijer Inc.	✓	Ulta Salon, Cosmetics & Fragrance, Inc	✓
Dollar General Corporation	✓	Petco	✓	Walgreens	✓
DoorDash, Inc.	✓	PetSmart	✓	Walmart Inc.	✓
Family Dollar Stores, Inc.	✓				

Sensor Tower

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

Interested in our Digital Market Insights Solutions?

If you want to learn more about Sensor Tower, please request a demo:

Request a free demo!

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