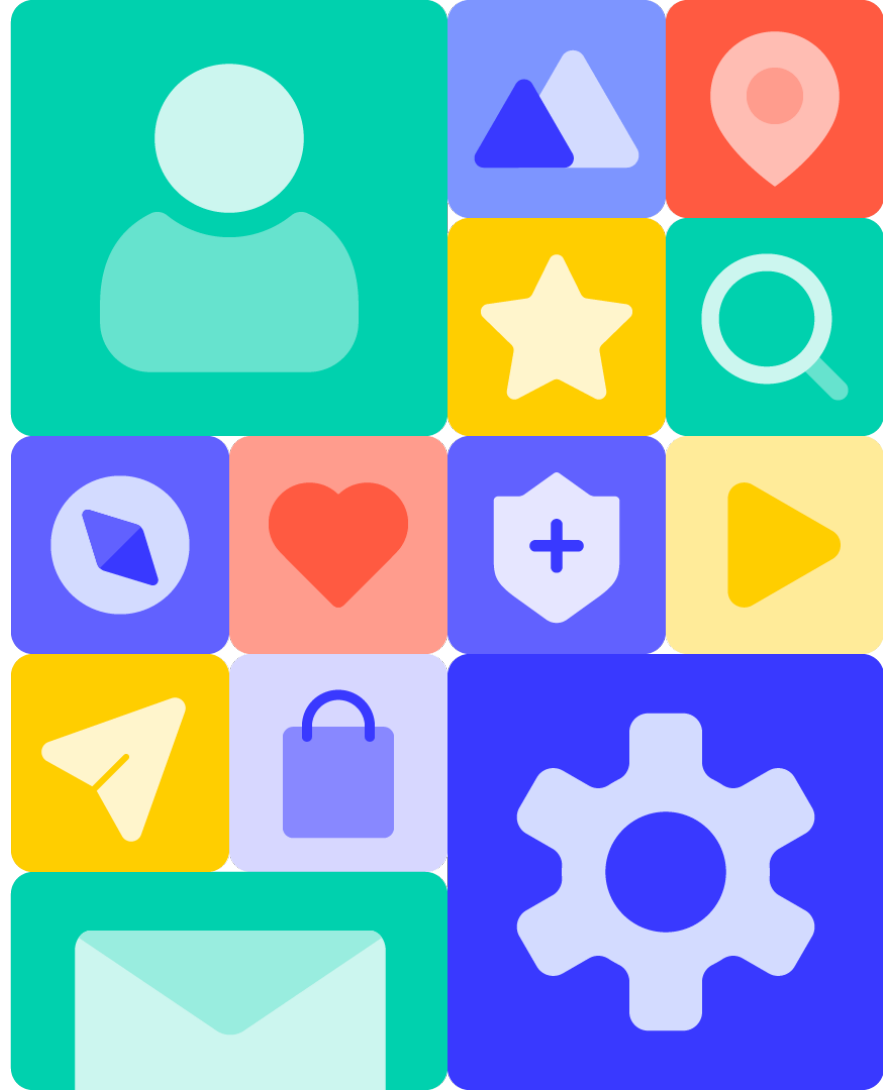


2026

Global Non-Gaming App Trends Report

MIntegral  insighttrackr



01

Download & Revenue

AI and Short Drama apps are leading non-gaming app growth.

02

User Acquisition

Intensified competition is forcing a shift toward smart bidding solutions.

2026 Global Non-Gaming App Trends Report

Contents

03

Ad Monetization

The dominance of IAA-only models and the benefits of video-based formats.

04

Success Stories

Apps can achieve up to 10x growth and profitable scale with Mintegral.

Today's market leaders are no longer just those who solve a problem, but those who transform apps from a functional user experience into an engaging one.

However, the pressure to acquire users efficiently and monetize effectively has never been higher.

To navigate this landscape, Mintegral and Inshtrackr have combined global market intelligence with granular platform data.

This report provides a strategic roadmap — from OS-level revenue patterns to automated bidding benchmarks — equipping developers with the tools to scale profitably into 2026.

Key Findings

The Headline Trend

AI-focused apps such as ChatGPT and Perplexity are driving rapid growth. AI-enhancements appear to be contributing to a revenue uplift in many genres.

Short-Form Content

Short Drama apps achieved unprecedented YoY revenue growth, signaling a major shift in global content consumption.

Android vs. iOS

Android remains the primary driver for user acquisition volume, but revenue patterns skew toward iOS, especially in Finance & Business and Life Services verticals.

Intensifying Competition

The number of advertisers is increasing across all genres, with Finance & Business recording the fastest YoY growth in advertiser count.

Automated Bidding

Adoption of Smart Bidding models such as Target ROAS and Target CPE is accelerating, with Utilities apps leading the way.


Research Methodology

Data Sources



This report draws on two primary data sources: Mintegral, a leading mobile advertising platform that provides aggregated, anonymized data from its own platform, and Insigtrackr, which tracks global mobile advertising activity.

Data Coverage & Period



The data spans January to December 2025, covering 100+ key global markets excluding Mainland China.

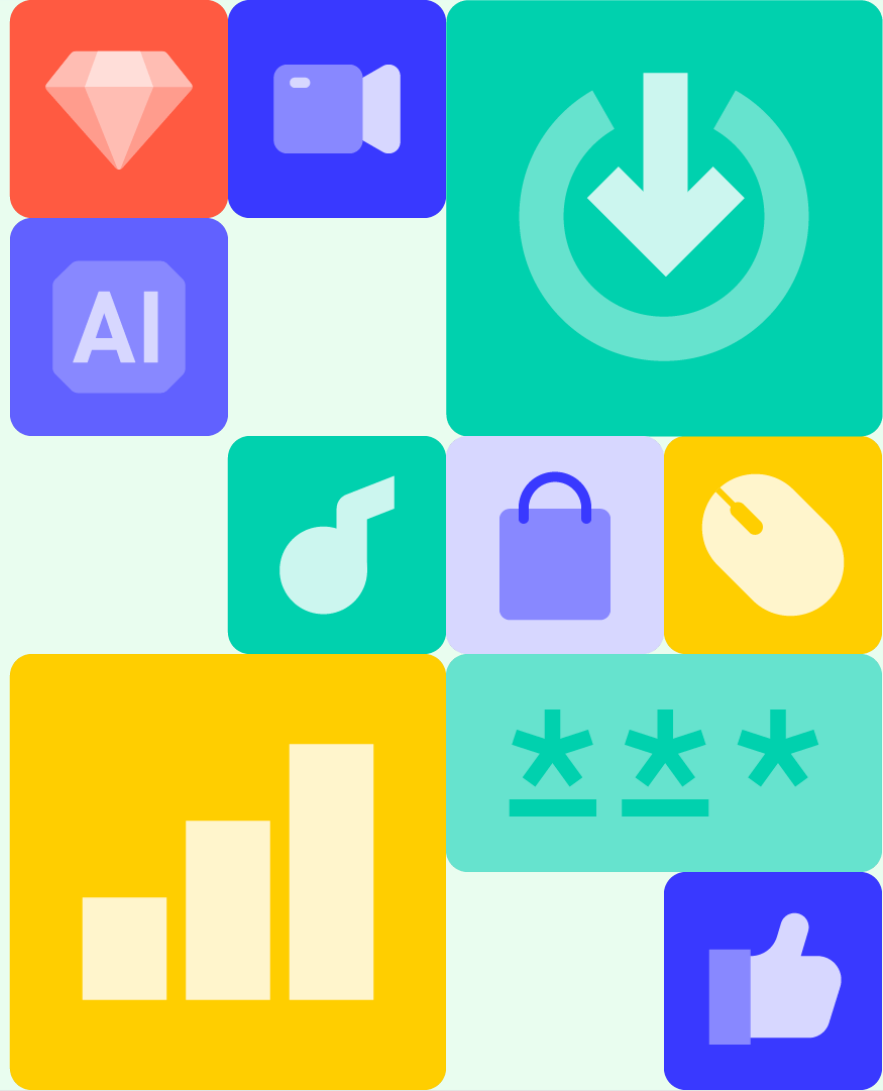
App Categories



The study focuses on non-gaming mobile applications, with particular emphasis on Entertainment, E-Commerce, Utilities, and AI Chat.

01

Download & Revenue

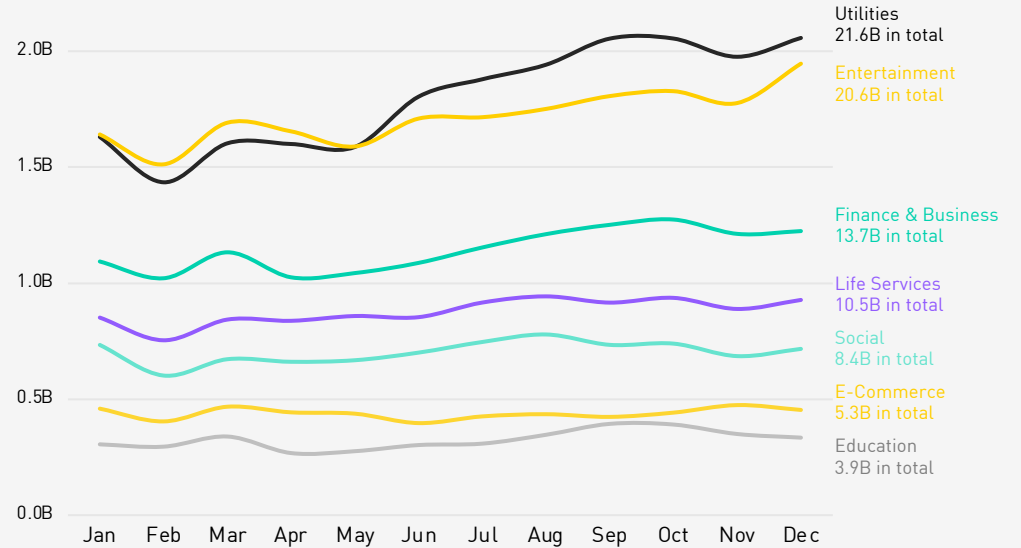


Utilities and Entertainment Lead Non-Gaming App Downloads

- Utilities (21.6 billion (B) downloads) and Entertainment (20.6B) are the two largest genres by download volume in 2025.
- Download trends show clear seasonality with fluctuations concentrated in the summer and year-end holiday season.

Monthly App Downloads by Category

Jan 1, 2025 – Dec 31, 2025 | Global (Excl. Mainland China)



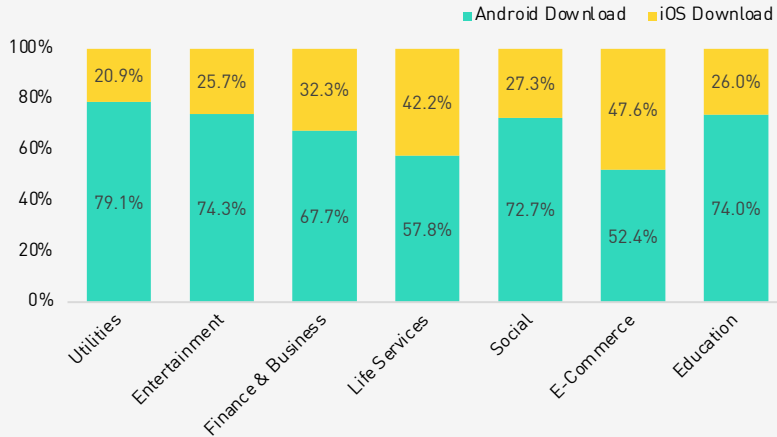
Data Source: Insihtrackr

Scale-Driven Growth on Android vs. Value-Driven Monetization on iOS

- Between operating systems (OS), Android dominates download volume, revealing its role as the primary driver of user scale. Utilities (79.1%) are heavily Android-dependent, while Life Services (57.8%) and E-Commerce (52.4%) showed a more balanced split.
- Revenue patterns skew toward iOS. Finance & Business (51.3%) and Life Services (56.9%) accounted for a larger share of revenue from iOS despite fewer installs.

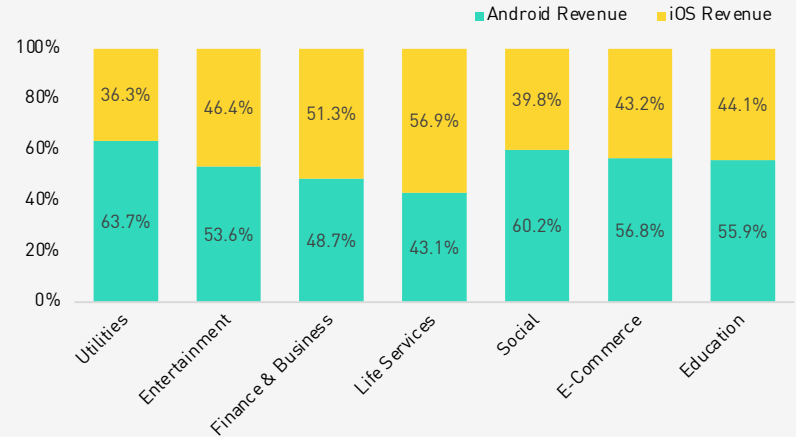
Download Distribution by OS

Jan 1, 2025 – Dec 31, 2025 | Global (Excl. Mainland China)



Revenue Distribution by OS

Jan 1, 2025 – Dec 31, 2025 | Global (Excl. Mainland China)



Data Source: Insignitrackr. Revenue data reflects estimated IAP and IAA revenue..

Download Growth is Split Between Emerging and Mature Categories

- Utilities rankings were reshaped by AI-focused apps delivering exceptional YoY download growth.
- E-Commerce remained a mature and stable sector with growth concentrated in apps from emerging markets like India and Latin America.
- Six of the top Short Drama apps recorded more than triple digit growth.

2025 Top Utilities, E-Commerce & Short Drama Apps by Downloads

Jan 1, 2025 – Dec 31, 2025 | Global (Excl. Mainland China)

Utilities		
#	App Name	YoY Growth
01	ChatGPT	+1340.61%
02	Messenger	-10.44%
03	Dola: Formerly Cici	+307.62%
04	Truecaller	-2.72%
05	Google	-6.93%
06	Perplexity	+3612.86%
07	DeepSeek	NEW
08	SHAREit	+31.57%
09	TeraBox	-11.02%
10	Google Chrome	-1.82%

E-Commerce		
#	App Name	YoY Growth
01	Temu	-5.91%
02	Meesho	-17.92%
03	SHEIN	-21.32%
04	Flipkart	+41.89%
05	Amazon Shopping	-3.05%
06	AliExpress	-2.98%
07	Shopee	-15.03%
08	Myntra	+15.26%
09	Mercado Libre	+171.52%
10	Shop	+60.10%

Short Drama		
#	App Name	YoY Growth
01	DramaBox	+130.93%
02	ReelShort	+215.03%
03	Kuku TV	+4267.70%
04	ShortMax	-30.43%
05	GoodShort	+757.08%
06	NetShort	+3449.70%
07	DramaWave	+8363.73%
08	Melolo	NEW
09	DramaReels	NEW
10	QuickTV	NEW

Data Source: Insihttrackr. "NEW" indicates apps launched in 2025 or late 2024 with insufficient data for YoY comparison.

AI Adoption and Short-Form Content Consumption Drive Explosive Revenue Growth

- Short Drama apps deliver exceptional YoY revenue growth, with two new regional players gaining traction alongside established leaders.
- AI Social apps benefit directly from the Generative AI adoption wave.
- Education app growth is primarily driven by AI-enhanced use cases such as translation, language learning, and problem solving, leading to growing use and revenue.

2025 Top Short Drama, AI Social & Education Apps by Revenue

Jan 1, 2025 – Dec 31, 2025 | Global (Excl. Mainland China)

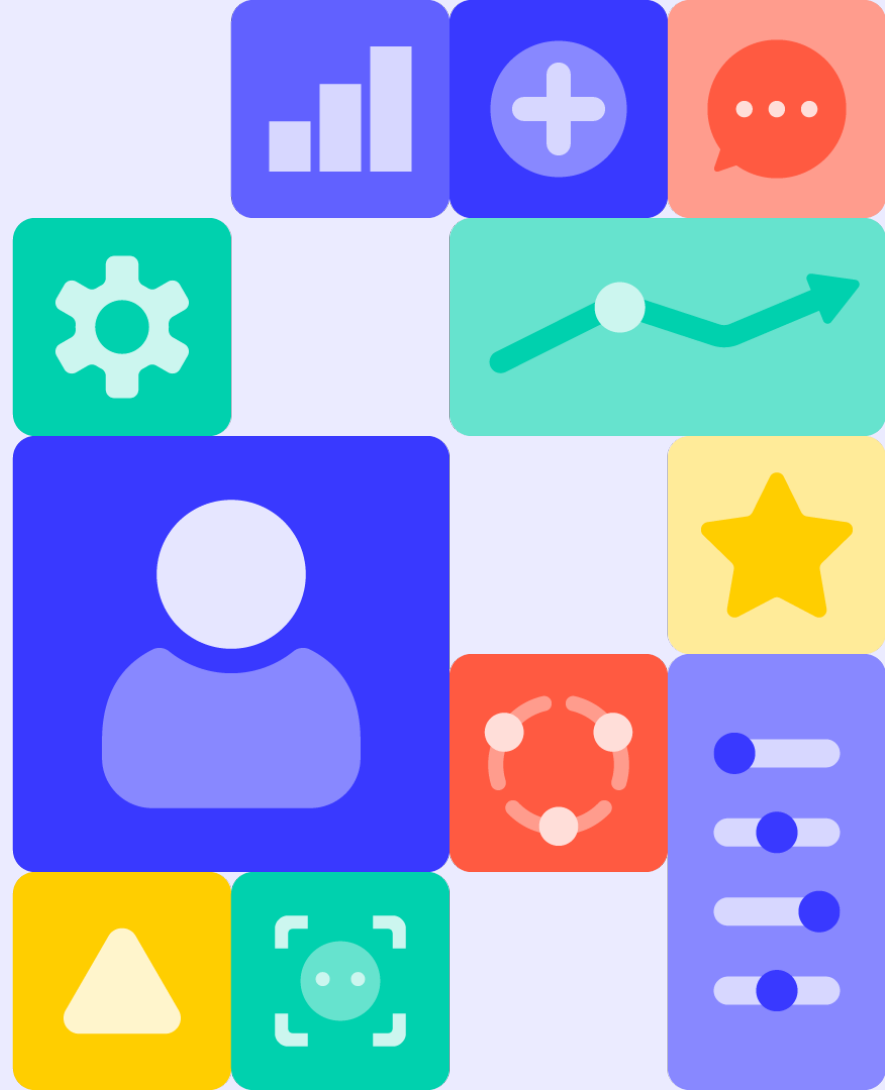
Short Drama		
#	App Name	YoY Growth
01	ReelShort	+576.9%
02	DramaBox	+1284.4%
03	NetShort	+13400.8%
04	GoodShort	+2270.1%
05	DramaWave	+12715.4%
06	ShortMax	+395.8%
07	FlickReels	+44659.9%
08	Kuku TV	+45039.4%
09	RapidTV	+498456.4%
10	StardustTV	+853.5%

AI Social		
#	App Name	YoY Growth
01	Character AI	+917.8%
02	PolyBuzz	+2813.9%
03	Talkie	+1545.4%
04	Linky AI	+852.7%
05	Emochi	+6132.1%
06	Friends	+284.2%
07	Flirtify	NEW
08	LoveyDovey	+22192.6%
09	HiWaifu	+696.8%
10	Dialogue	+711.9%

Education		
#	App Name	YoY Growth
01	Naver Papago	+898.9%
02	DeepL Translate	+953.2%
03	Photomath	-23.2%
04	Hi Translate	+281.6%
05	ClassDojo	+1144.5%
06	WeMuslim	+1041.9%
07	U Dictionary Translator	+460.4%
08	Lingokids	+1408.0%
09	Finch	+4022.6%
10	Babbel	+529.7%

02

User Acquisition

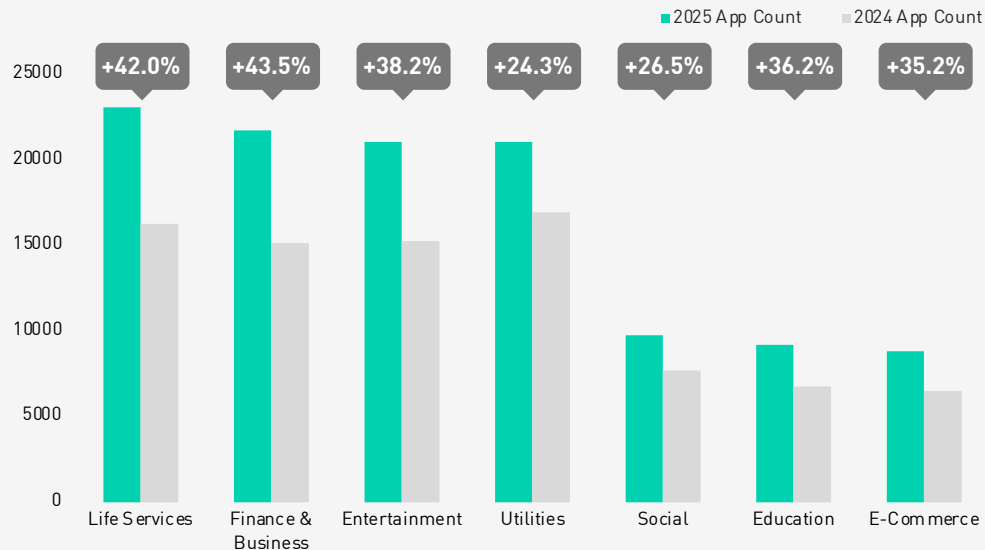


User Acquisition Competition Continues to Flourish

- The number of non-gaming apps running user acquisition campaigns is increasing across all major genres, signaling a competitive UA environment.
- Life Services (+42%) leads in app count, driven by its fragmented market alongside strong demand.
- Finance & Business (+43.5%) records the fastest YoY growth, reflecting rising competition as more apps invest in paid acquisition to reach high-value users.
- Entertainment (+38.2%) and Utilities (+24.3%) also see notable increases in advertiser participation, while Education (+36.2%) and E-Commerce (+35.2%) maintain solid growth despite smaller scale.

Global Advertising App Count by Category (2024 vs. 2025)

Jan 1, 2025 – Dec 31, 2025 | Global (Excl. Mainland China)



Data Source: Insidertrackr

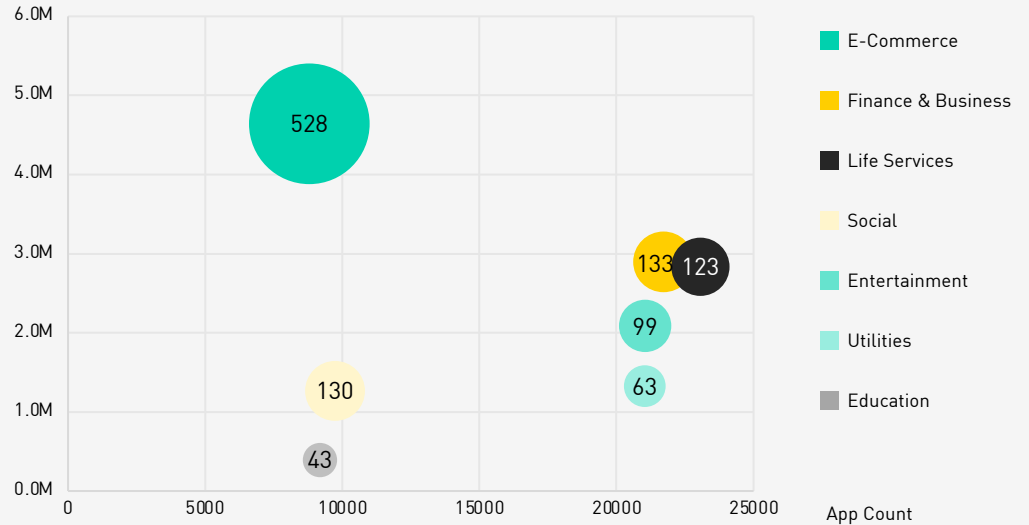
E-Commerce Leads in Advertising Scale

- E-Commerce exhibits the highest ad creative density among non-gaming genres, reflecting an advertising model where most extensive product catalogs and visual assets are systematically repurposed as ad creatives, amplified by solutions like DCO and retargeting.
- Finance & Business and Life Services show high density, indicating significant competition with both substantial ad creative and app counts.
- Social achieves comparable density levels but with roughly half the ad creative and app counts of Finance & Business and Life Services, highlighting concentrated creative efforts.

Ad Creative Density by Category

Jan 1, 2025 – Dec 31, 2025 | Global (Excl. Mainland China)

Ad Creative Count



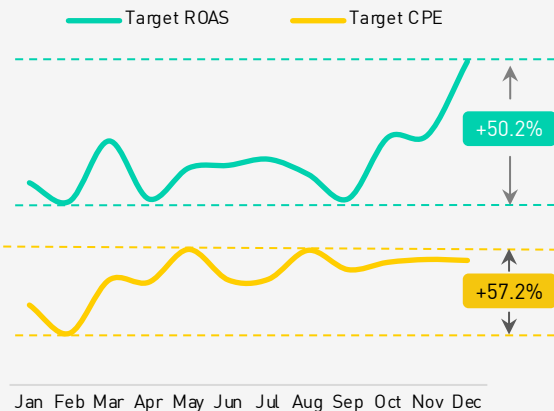
Data Source: Insidertrackr. Bubble size represents the average number of ad creatives per app in 2025 for each genre.

Smart Bidding Solutions to Efficiently Scale User Acquisition

- Mintegral Smart Bidding sees significant non-gaming ad spend growth. Both Target ROAS and Target CPE expenditures surge by over 50%, signaling a strong market shift toward ROI-driven UA strategies.
- Utilities continues to lead the adoption of Target ROAS campaigns, underscoring a focus on revenue-optimized acquisition, while Entertainment maintains a steady growth profile.
- The Target CPE landscape is undergoing a major structural shift, with Finance & Business and Utilities rapidly expanding their footprint.

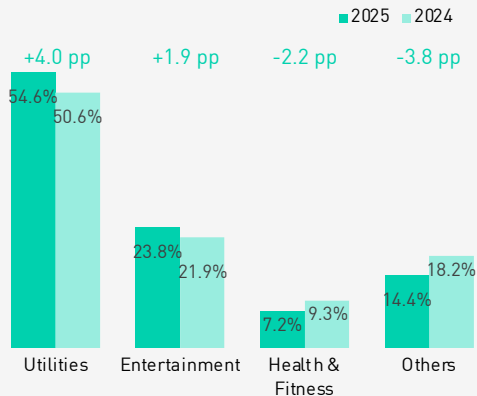
Ad Spend via Mintegral Smart Bidding

Jan 1, 2025 – Dec 31, 2025 | Global (Excl. Mainland China)



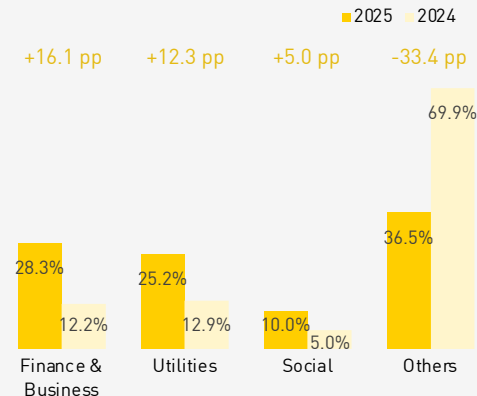
Target ROAS Ad Spend by Category

Jan 1, 2025 – Dec 31, 2025 | Global (Excl. Mainland China)



Target CPE Ad Spend by Category

Jan 1, 2025 – Dec 31, 2025 | Global (Excl. Mainland China)



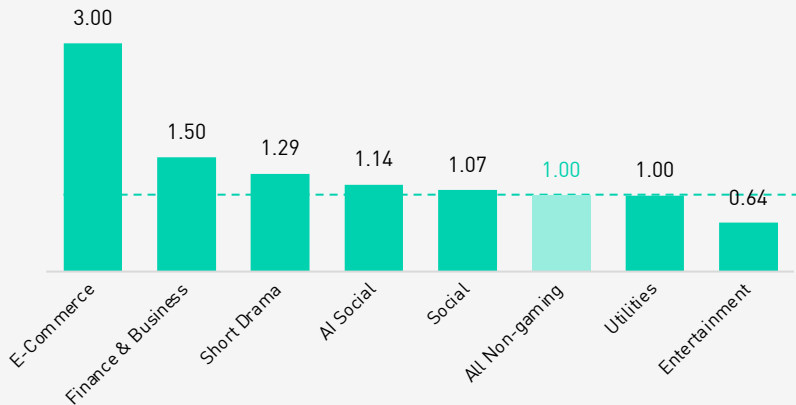
Data Source: Mintegral. Mintegral Smart Bidding includes both Target ROAS and Target CPE campaigns.

CPI Diverges Sharply by Category and OS

- On Android, E-Commerce (3x) records the highest CPI, indicating intense competition for transactional users, followed by Finance & Business (1.5x) and Short Drama (1.3x). Entertainment (0.6x) remains the most cost-efficient category.
- On iOS, CPI exhibits higher range: Finance & Business (4.6x) stands out with a substantially higher CPI, reflecting strong competition for high-value users.

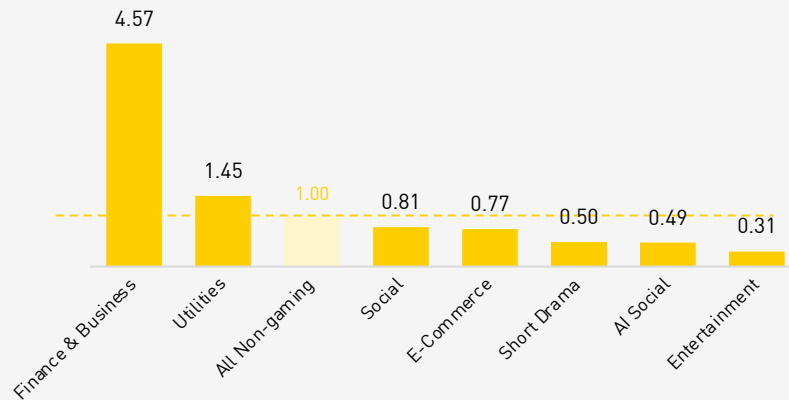
Average CPI Index on Android

Jan 1, 2025 – Dec 31, 2025 | Global (Excl. Mainland China) | CPI values are indexed



Average CPI Index on iOS

Jan 1, 2025 – Dec 31, 2025 | Global (Excl. Mainland China) | CPI values are indexed



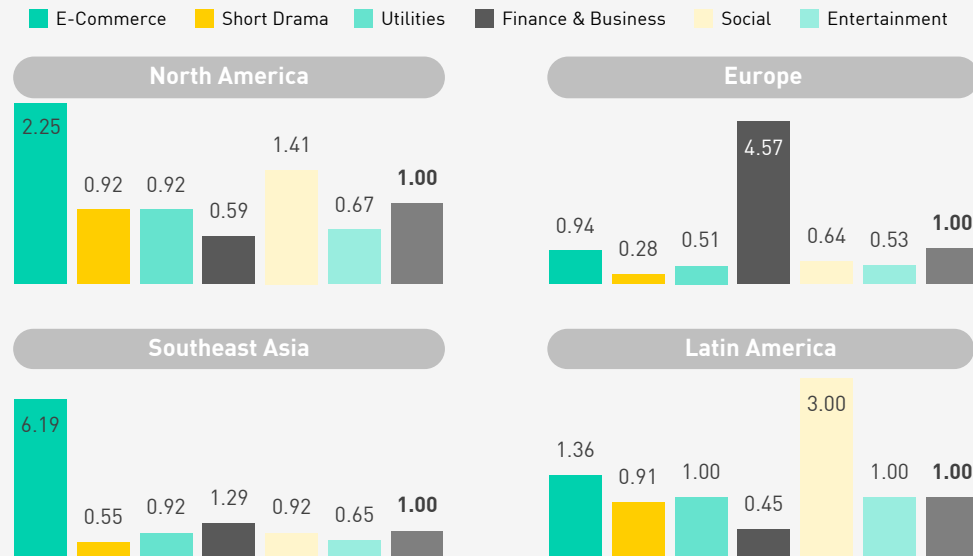
Data Source: Mintegral. Indexed to baseline [1.0] CPI across categories.

Average CPI by Category Across Key Regions on Android

- In North America & Southeast Asia, E-Commerce shows a clear CPI premium over the regional non-gaming baseline, reflecting intensified competition driven by scale-oriented user acquisition.
- Most other non-gaming genres remain at or below the regional average, indicating a relatively stable cost environment outside of commerce-focused campaigns.
- In Europe, Finance & Business (4.6x) emerges as the primary CPI driver within the region.
- In Latin America, Social (3x) records the highest CPI among selected non-gaming genres, indicating intensified competition for scalable social traffic.

Average CPI Index of Selected Categories on Android

Jan 1, 2025 – Dec 31, 2025 | Global (Excl. Mainland China) | CPI values are indexed by region



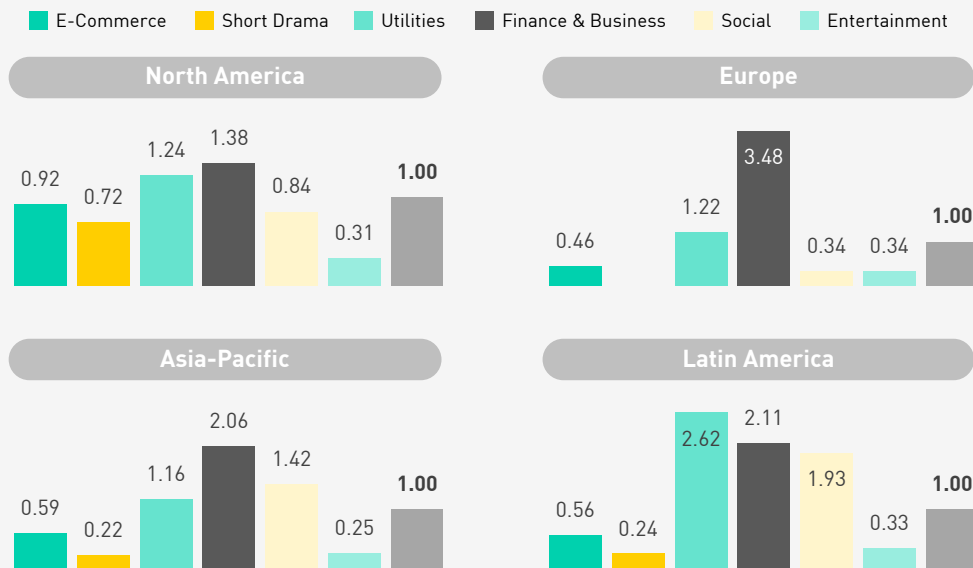
Data Source: Mintegral. Indexed to baseline (1.0) CPI across categories.

Average CPI by Category Across Key Regions on iOS

- In North America, CPI levels are relatively balanced, with Finance & Business (1.4x) and Utilities (1.2x) showing moderately higher acquisition costs.
- In Europe, Finance & Business (3.5x) stands out with significantly elevated CPI relative to other non-gaming categories on iOS.
- In Asia-Pacific, Finance & Business (2x) and Social (1.4x) are primary CPI drivers, both exceeding the regional non-gaming benchmark.
- In Latin America, Utilities (2.6x), Finance & Business (2.1x), and Social (2x) record high CPI levels.

Average CPI Index of Selected Categories on iOS

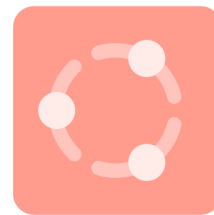
Jan 1, 2025 – Dec 31, 2025 | Global (Excl. Mainland China) | CPI values are indexed by region



Data Source: Mintegral. Indexed to baseline (1.0) CPI across categories.

UA in the Holiday Season:

Stats, Facts, and Tips to Refine Your UA Strategies

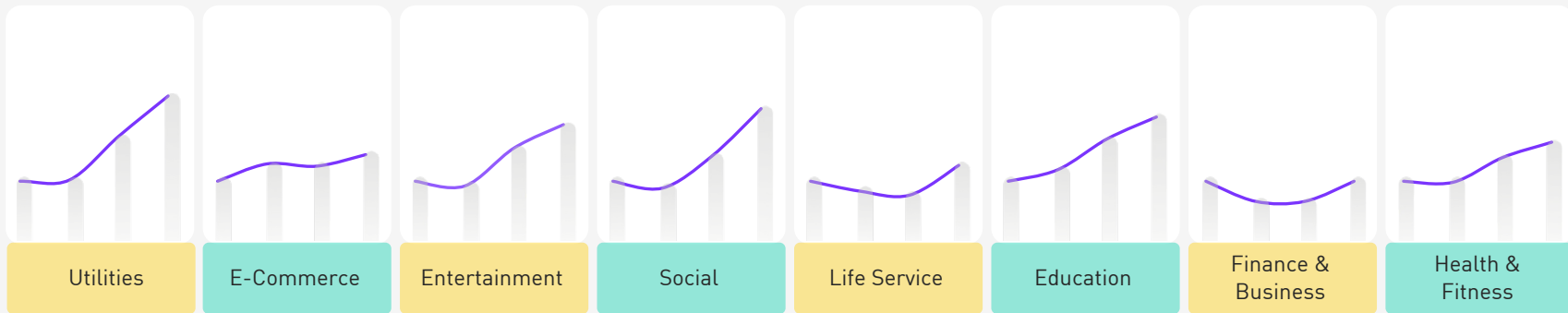


Who Is Focusing Most on Holiday Season UA?

- Most categories' ad creative volume shows net positive growth from September to December, indicating broad holiday momentum.
- Utilities, Entertainment, Social and Education apps are the most active advertisers in Holiday Season, ramping up ad creative volumes at this time.
- E-Commerce and Health & Fitness apps also show solid, consistent growth, steadily investing in creatives throughout the period to capture holiday momentum.

Ad Creative Trends During Holiday Season by Category

Sep 1, 2025 – Dec 31, 2025 | Global (Excl. Mainland China)

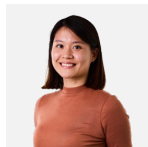


Data Source: Insihtrackr

How to Engage Your Audience in the Holiday Season



During the high-stakes holiday season, user acquisition is only half the battle. With 77% of users typically dropping off within three days, retargeting is as an increasingly valuable strategy for advertisers to protect seasonal spend.



Jenny Lin

Director of Business Development
Mintegral

3 Actionable Tips

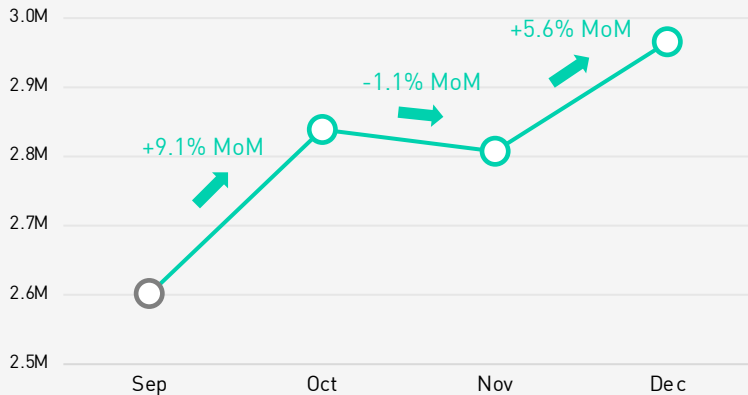
- **Prioritize warm audiences to maximize holiday ROI**
Focus on retargeting lapsed users, past installers, or high-intent audiences who already know your app. These users convert and engage significantly better than new users.
- **Use outcome-based buying with smart frequency control**
Work with partners that charge based on real outcomes (such as purchases or re-installs), not impressions or clicks. Combine this with block lists and frequency caps to avoid wasting spend on active users and reduce impression fatigue during peak holiday traffic.
- **Leverage platform strengths and creative flexibility**
Double down on Android retargeting for and selectively run iOS retargeting where cohorts are large enough. Choose partners that support flexible ad formats and frequent creative refreshes to keep holiday messaging timely, engaging, and conversion-driven.

Early & Aggressive: E-Commerce Ad Creative Expansion for Holiday Season

- E-commerce apps are investing heavily and starting significantly earlier than the traditional November–December holiday retail peak to capture the full opportunity. Ad creative volume shows strong overall growth from September onward, with clear acceleration into December.
- Latin America and Europe emerge as the leading targets, together accounting for over 40% of holiday ad creatives — signaling robust demand in both high-growth emerging and mature markets.

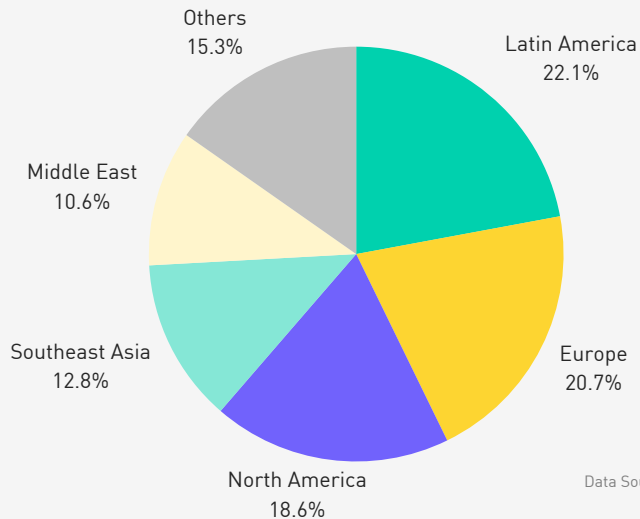
E-Commerce Ad Creative Volume

Sep 1, 2025 – Dec 31, 2025 | Global (Excl. Mainland China)



E-Commerce Ad Creative Distribution by Region

Oct 1, 2025 – Dec 31, 2025 | Global (Excl. Mainland China)



Data Source: Insightrackr

Unlocking Mobile Performance Marketing for E-Commerce Sellers



Smaller and mid-sized companies can take advantage of what players have known for a while: mobile performance marketing is a growth superpower for all.

It's about time that ecommerce companies lean into this environment to identify new prospects, drive sales and strengthen their relationships with existing customers.



Matthew Leopold

Director of New Business
Mintegral

4 Actionable Tips:

- **Shift to engagement-based targeting**

Use performance-driven campaign models like target CPE instead of relying solely on install-based targeting to better capture meaningful user interactions.

- **Invest in accurate attribution and tracking**

Leverage advanced tracking tools to connect user actions to real ecommerce outcomes, enabling smarter optimization, lower costs, and clearer ROI insights.

- **Choose the right PMP partners and KPIs**

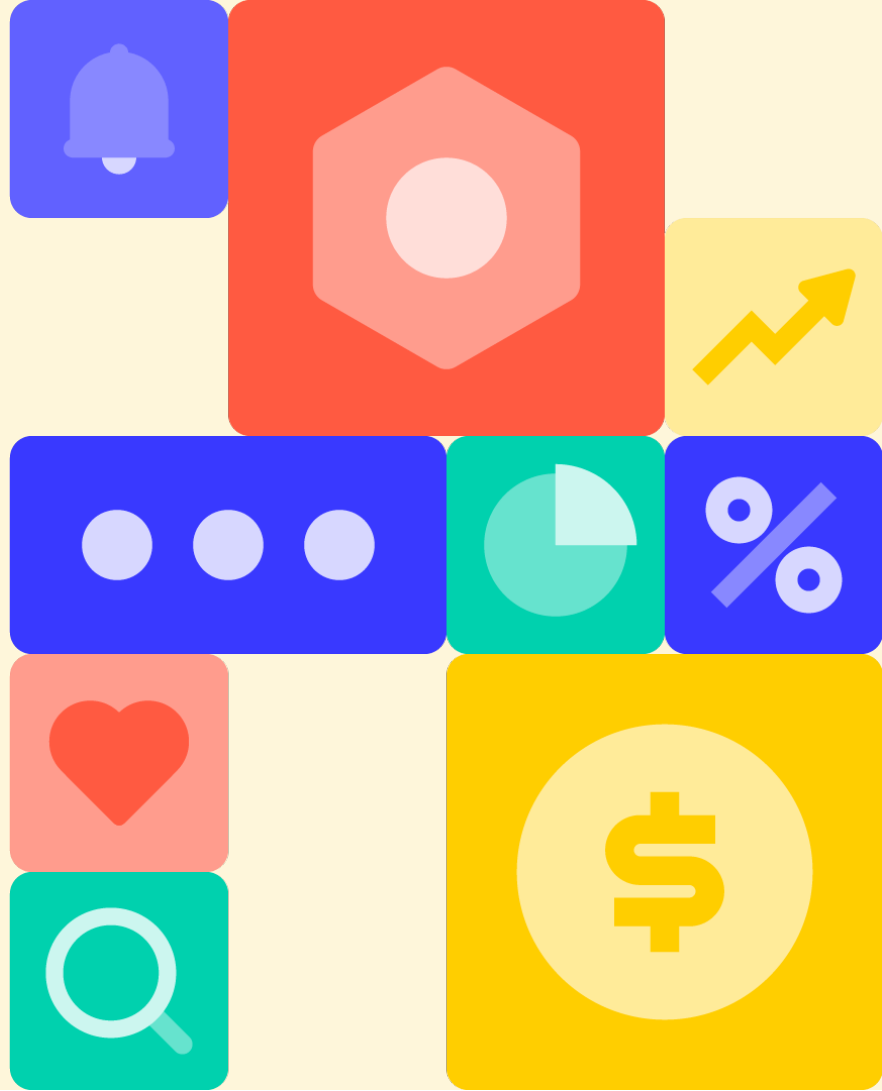
Work with transparent, data-driven partners, optimize toward the right ecommerce KPIs, and ensure strong creative, attribution, and reporting foundations.

- **Prepare for a mobile-first future**

Explore emerging formats like playable ads and prioritize mobile performance advertising to stay competitive as shopping behavior continues shifting away from desktop.

03

Ad Monetization

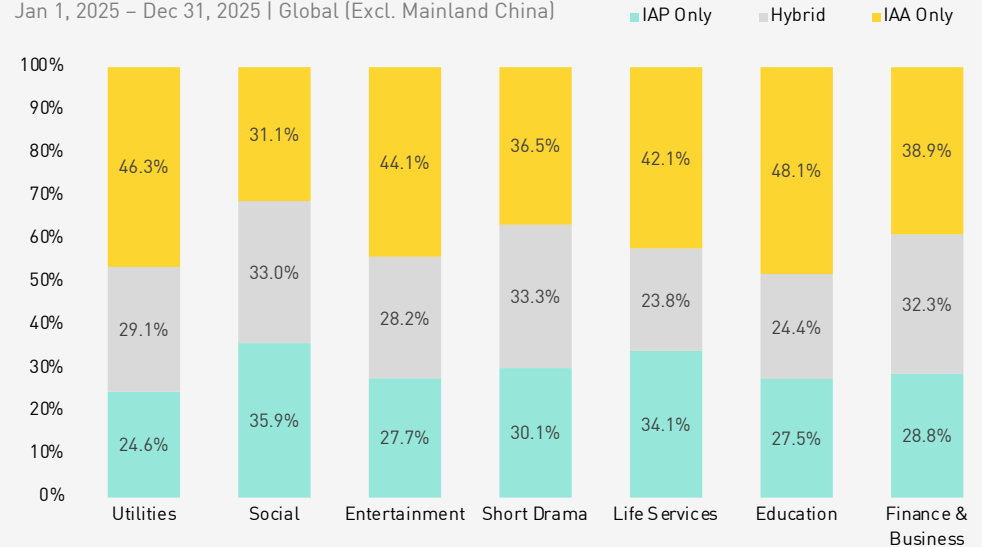


IAA Dominates Non-Gaming Monetization

- IAA-only monetization is the dominant revenue model. Education (48.1%), Utilities (46.3%), and Entertainment (44.1%) lead in their share of IAA.
- The share of IAP apps in Social (35.9%) and Life Services (34.1%) is higher compared with other categories, reflecting a user base willing to spend on in-app purchases.
- Short Drama demonstrates a balanced distribution across IAA, IAP, and Hybrid models, signaling diversification and experimentation within the category.

Proportion of App Monetization Model by App Category (IAP vs. Hybrid vs. IAA)

Jan 1, 2025 – Dec 31, 2025 | Global (Excl. Mainland China)



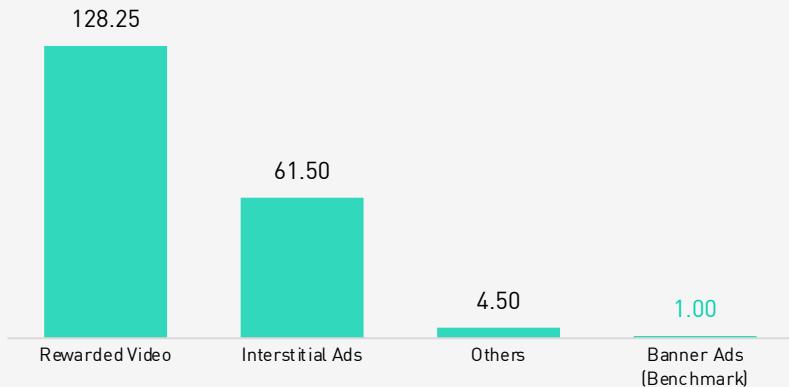
Data Source: Insigtrackr

Rewarded and Interstitial Video Deliver Significantly Higher eCPM on Mintegral

- On both Android and iOS, video-based ad placements outperform other formats on Mintegral.
- Rewarded Video delivers the highest eCPM, 128x of an Android banner and 165x on iOS, followed by Interstitial Video with similarly strong performance.
- The pattern is consistent across Android and iOS, with the latter showing an even larger premium for video ads.

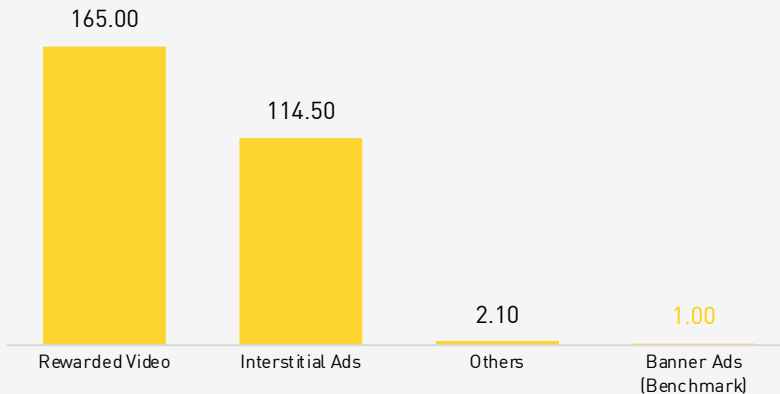
Average eCPM Index by Ad Format on Android

Jan 1, 2025 – Dec 31, 2025 | Global (Excl. Mainland China) | eCPM values are indexed



Average eCPM Index by Ad Format on iOS

Jan 1, 2025 – Dec 31, 2025 | Global (Excl. Mainland China) | eCPM values are indexed



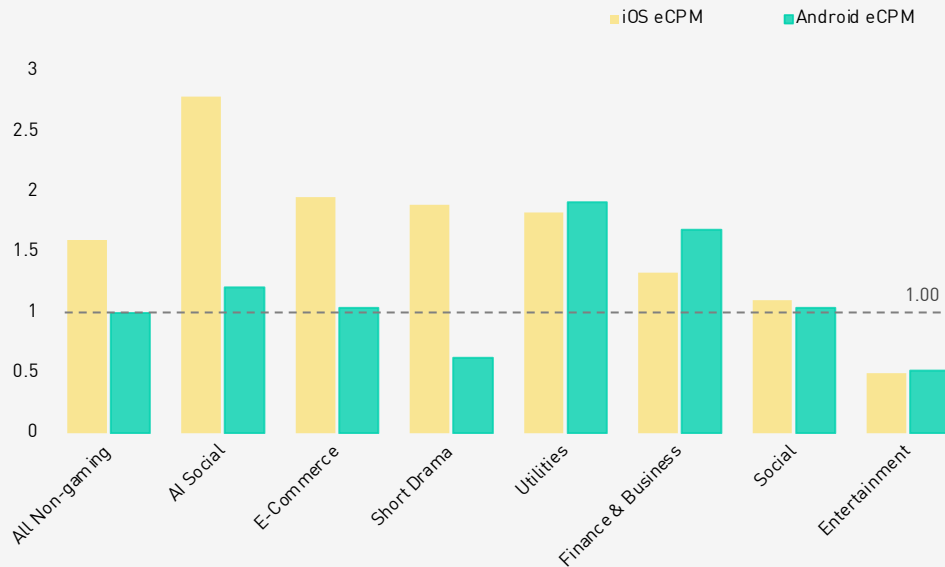
Data Source: Mintegral. Indexed to the average eCPM of Banner Ads (1.0).

Monetization is Highly Category-Dependent and OS-Specific

- AI Social delivers the strongest monetization on iOS, reaching nearly 2.8x the non-gaming benchmark. This reflects high advertiser demand and strong user engagement.
- Utilities and Finance & Business perform particularly well on Android, indicating stable value in functional and high-intent use cases.
- E-Commerce and Short Drama show moderate eCPMs, with slightly better iOS performance.

Average eCPM by App Category on Mintegral

Jan 1, 2025 – Dec 31, 2025 | Global (Excl. Mainland China) | eCPM values are indexed



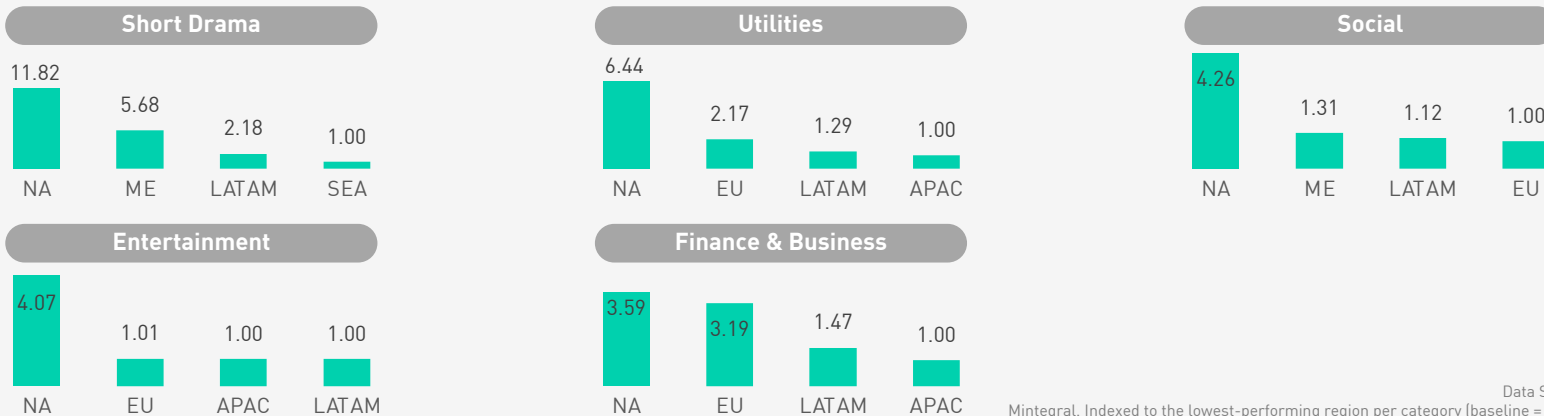
Data Source: Mintegral. Indexed to baseline (1.0) eCPM across categories.

Geo-Dependent Rewarded Monetization Trends on Mintegral

- North America shows the highest rewarded video eCPM, with especially pronounced premiums in Short Drama (11.82x) and Utilities (6.44x), indicating strong advertiser demand and monetization efficiency.
- Latin America and Asia-Pacific generally sit at the lower end of the eCPM range, serving as baseline markets across categories.
- The gap between top and bottom regions is most extreme in Short Drama, highlighting a sensitivity to market-level purchasing power and advertiser competition.

Average eCPM of Rewarded Video Ads by Region and App Category on Mintegral

Jan 1, 2025 – Dec 31, 2025 | Global (Excl. Mainland China) | eCPM values are indexed within each category



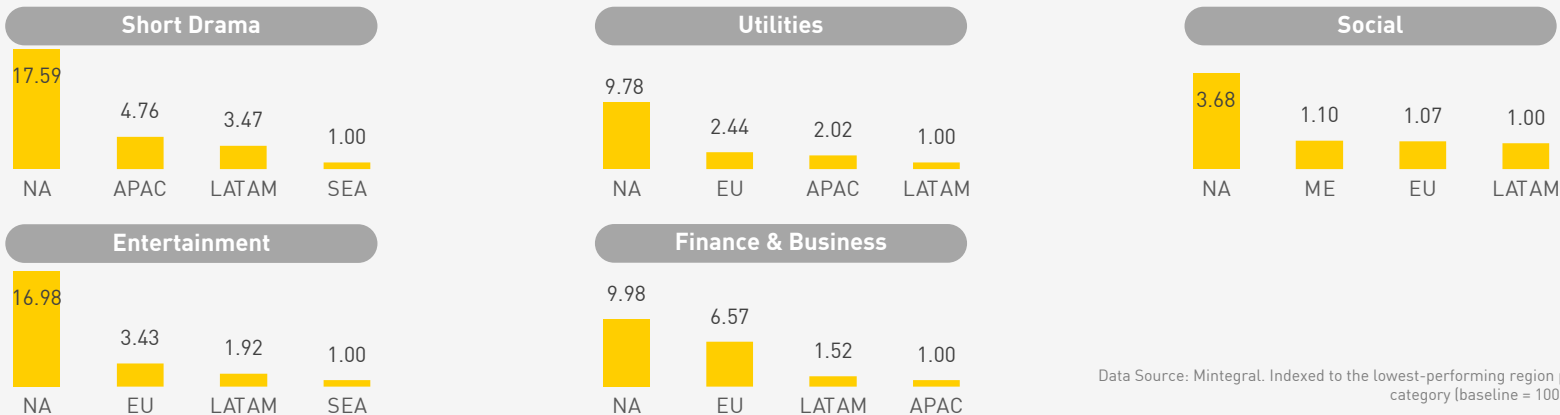
Data Source: Mintegral. Indexed to the lowest-performing region per category (baseline = 100%).

North America Dominates Interstitial Video eCPM

- North America delivers the highest eCPM across all selected genres, with particularly large premiums in Short Drama (17.59x) and Entertainment (16.98x).
- The wide gap between regions highlights that Interstitial Video monetization varies by region, reinforcing the importance of geo-specific strategies.

Average eCPM of Interstitial Video Ads by Region and App Category on Mintegral

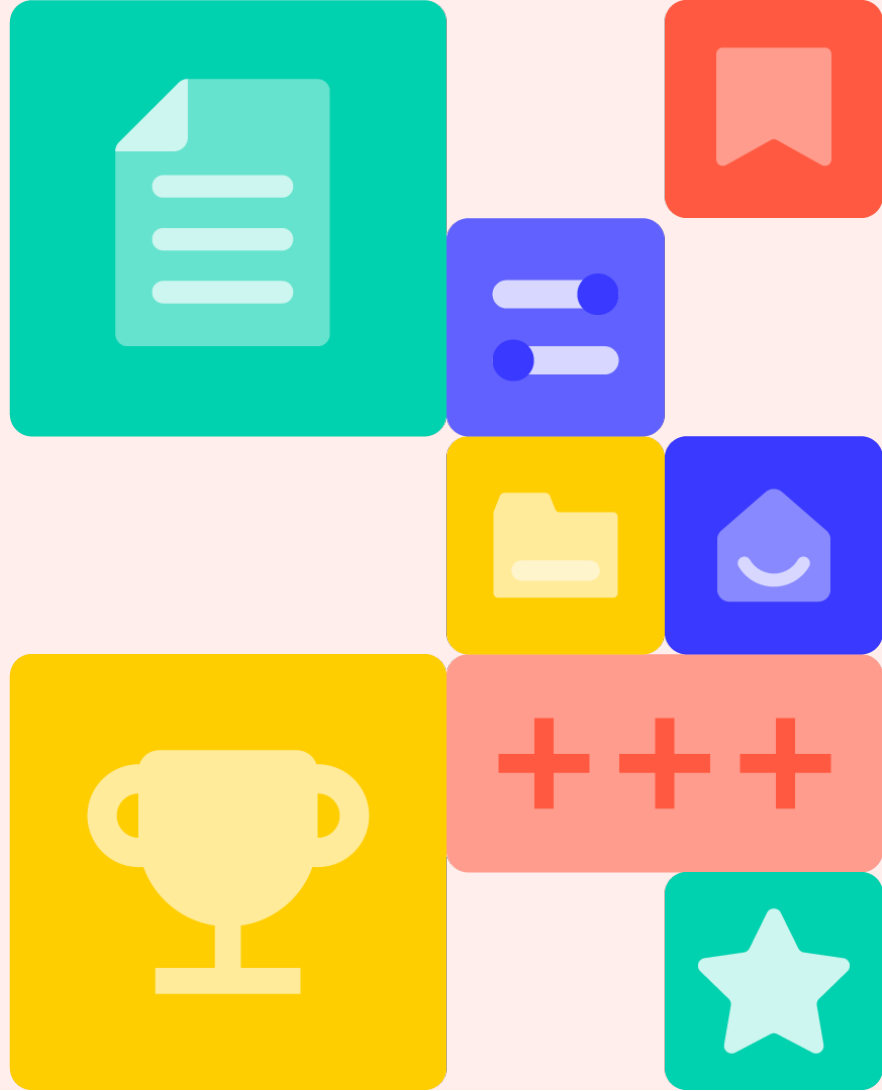
Jan 1, 2025 – Dec 31, 2025 | Global (Excl. Mainland China) | eCPM values are indexed within each category



Data Source: Mintegral. Indexed to the lowest-performing region per category (baseline = 100%).

04

Customer Success Stories & Solutions



Entertainment



MyDrama and MyPassion Scale with Mintegral's Target CPE Bidding



The Result

2X

Revenue Growth

100X

Install Growth

E-Commerce



Winedrops Achieves 10x Trial Growth with Mintegral

The Result

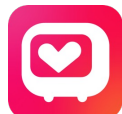
10X

Increase in Trials

Top 2

UA Channels

Entertainment



Moboreels and Moboreader Scale with AppGrowth and Monetization Solutions



The Result

300K+

Downloads

+10%

Paid Users

+15%

Ad Revenue

Utility



Zedge Achieved Profitable Scale with Mintegral's Hybrid ROAS Optimization

The Result

40%

Day 0 ROAS on iOS

60%

Day 0 ROAS on Android

5X

Growth in daily ad spend



Turn Engagement Into Growth

Mintegral is the leading mobile advertising platform dedicated to helping apps grow globally. With access to premium traffic, industry-leading machine learning, and interactive creatives, Mintegral's AppGrowth, Retargeting, and Monetization solutions enable marketers to scale audiences and revenue with ease.

Discover more at www.mintegral.com.

Our Growth Solution

User Acquisition



Mintegral AppGrowth gives you the reach to acquire quality users with premium global traffic, industry-leading AI, and creatives crafted to engage and convert.

Retargeting



To maximize ROI, users need to be engaged. Mintegral's Retargeting Solution leverages machine-learning technology to reconnect with your audience.

Monetization



Our premium ad resources and in-app bidding technology maximize the value of every ad placement and scale your revenue without sacrificing user experience.



Global Ad Intelligence & Marketing Insights

Insigtrackr is a global mobile marketing intelligence platform that empowers developers and advertisers with precise, actionable insights.

Its data coverage spans 148 countries and more than 200 media channels, with a database exceeding 3 billion ad creatives.

Get the Latest Insights on:

 @Insigtrackr

 <https://www.insigtrackr.com/en/>

 marketing@insigtrackr.com



200+

Global Media

148

Countries / Regions

3BN+

Ad Creatives Monitored

190+

Industries / Categories

160+

Advertising Platforms

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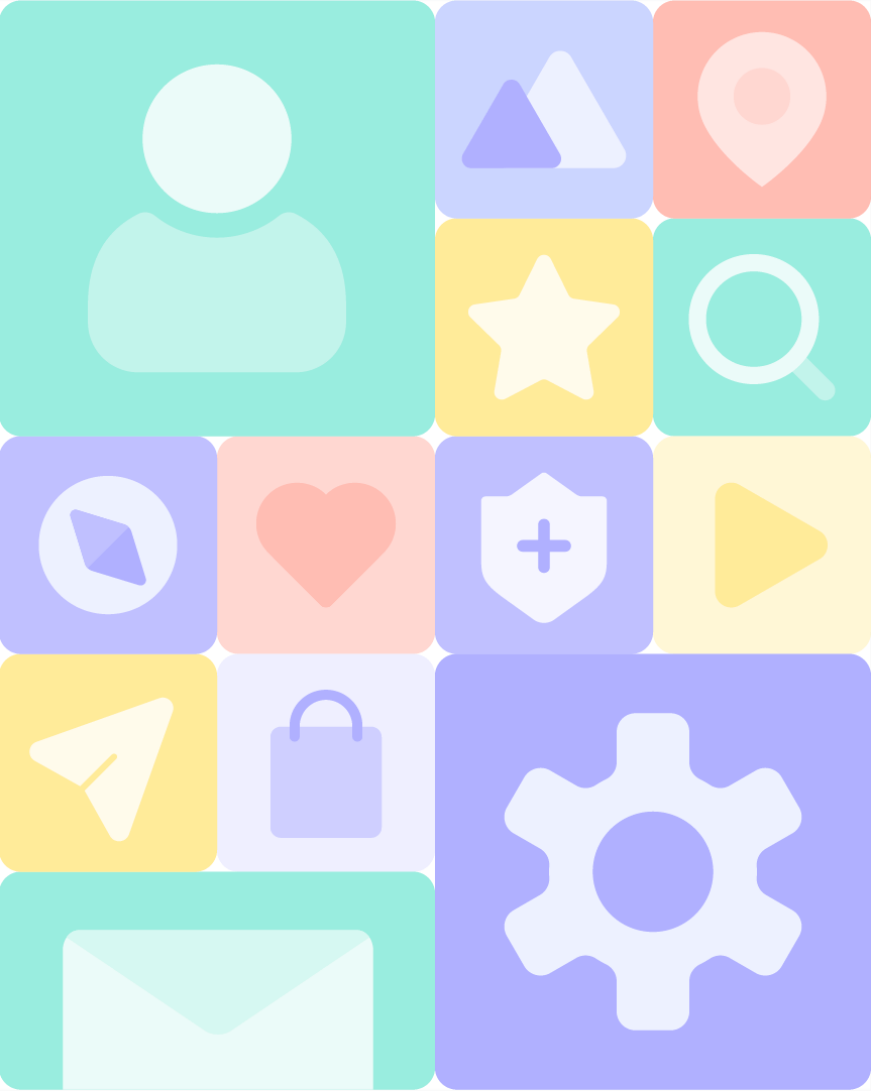
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