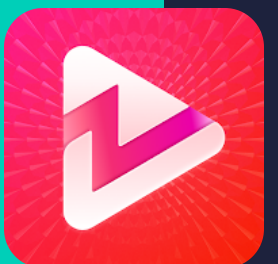
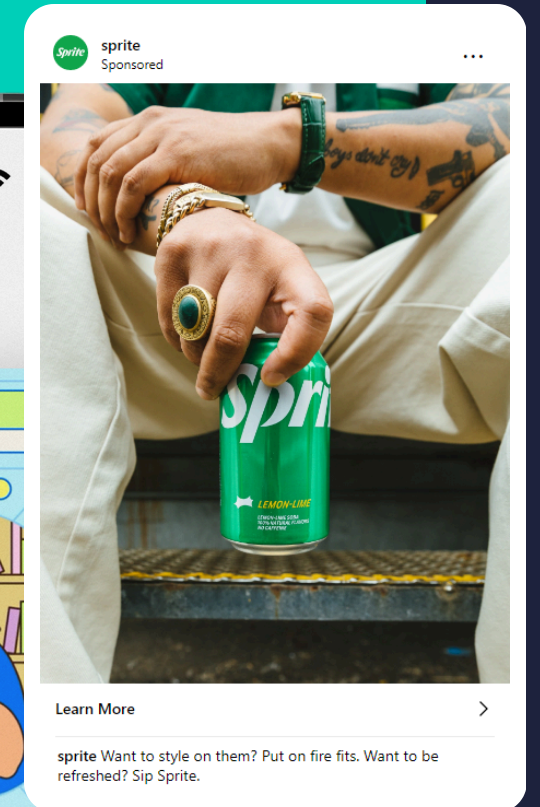
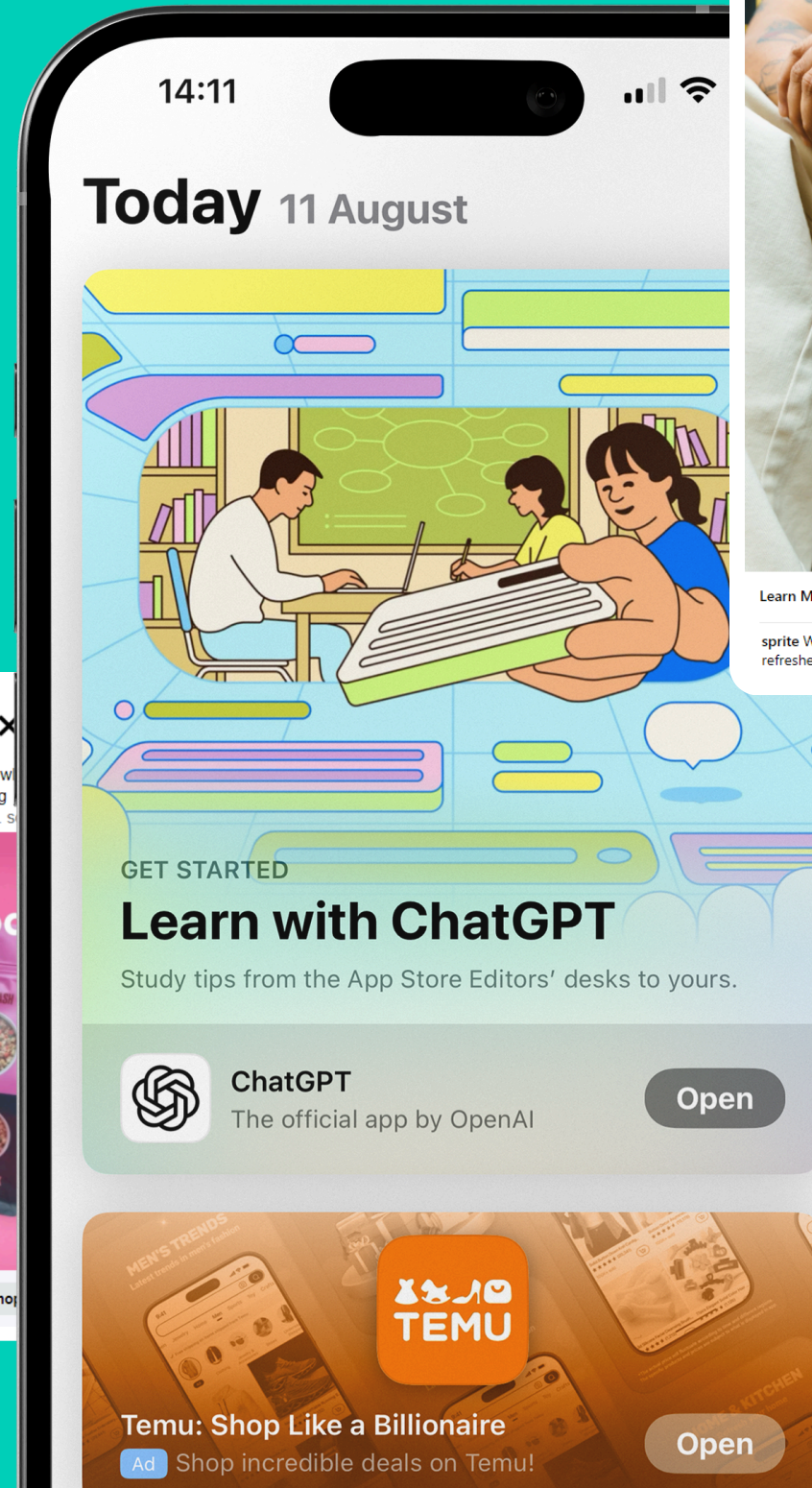




Q2 2025 Digital Market Index

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

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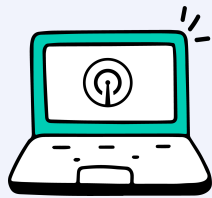
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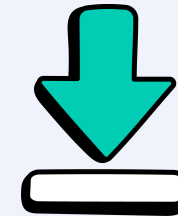
Q2 2025: **Mobile Market Overview**

About this Data:

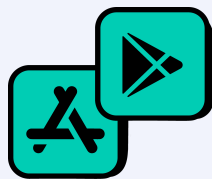
Mobile App Methodology



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



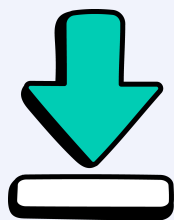
Downloads of the same app by the same user to multiple devices, updates, or re-installs of the same app by the same user are not counted towards the total.



Figures cited in this report reflect iOS App Store and Google Play download and revenue estimates for January 1, 2014 through December 31, 2024.



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.



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. 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.

[View Detailed Report Methodology Here.](#)

Mobile Consumers Now Spend More on Apps Than Games

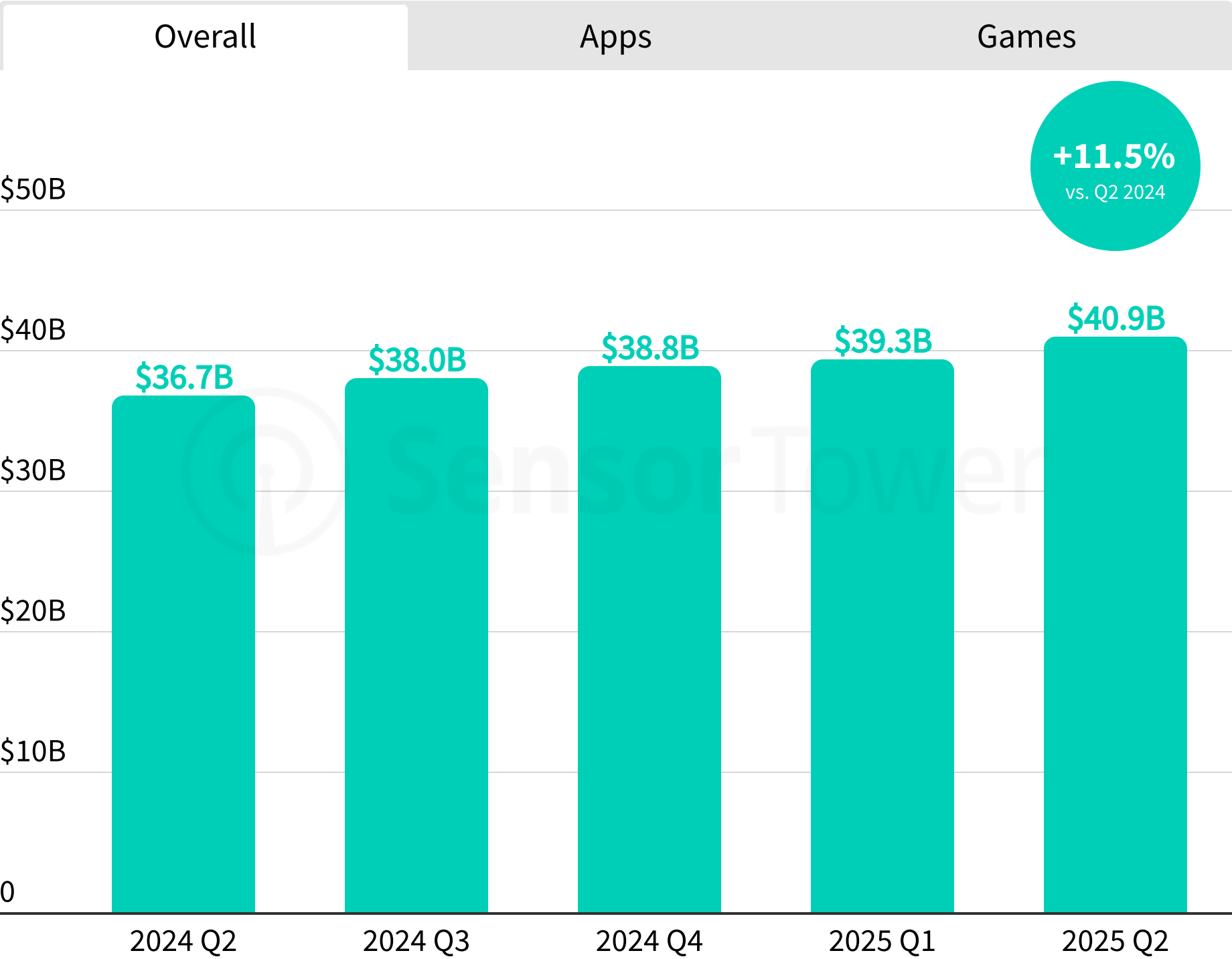
For the first time in Q2 2025, mobile consumers spent more on in-app purchases and subscriptions in non-gaming apps than in games. This marks a swift shift in consumer behavior, with non-gaming app revenue climbing from just 26% of total in-app purchase (IAP) revenue in Q2 2019 to 52% in Q2 2025.

Overall, global IAP revenue across iOS and Google Play reached a new all-time high of over \$40 billion in Q2 2025, an 11% year-over-year increase. This sustained growth highlights the continued strength of the mobile market as consumers become more comfortable spending on mobile.

In contrast, the mobile games market has remained stable in recent quarters, generating just under \$20 billion in IAP revenue.

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 Q2 2024 - Q2 2025
iOS and Google Play



iOS is Still the Preferred Platform for Mobile Monetization

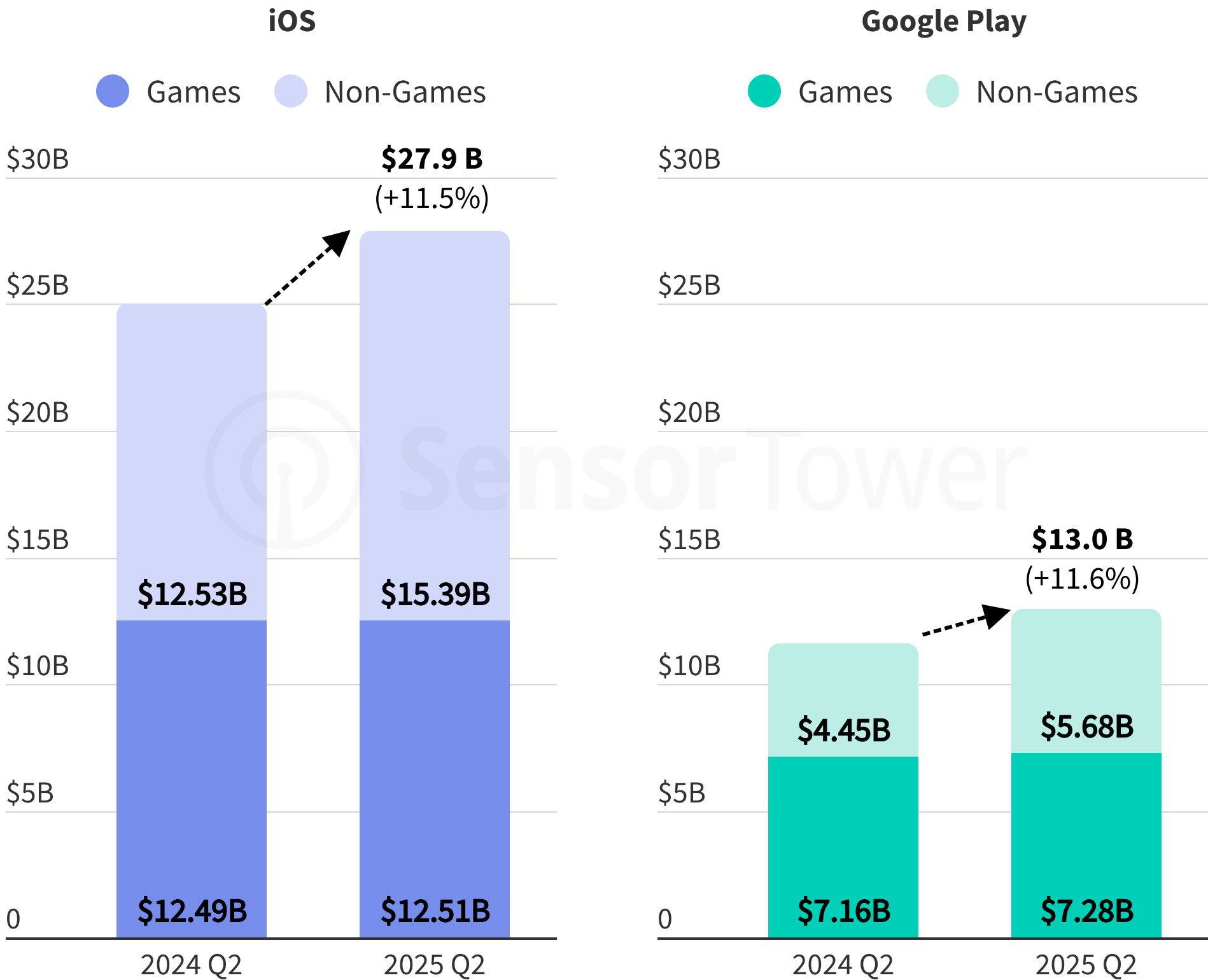
iOS continues to be the dominant platform for mobile monetization. Out of the nearly \$41 billion in total consumer spending across the two platforms, iOS accounts for just under \$28 billion—meaning more than two out of every three dollars spent go to Apple's platform.

Even when excluding China, the second-largest iOS market where Google Play is unavailable, iOS still maintains a significant \$10 billion lead in revenue.

Both platforms show strong growth, indicating robust monetization opportunities across the board. In fact, Google Play's growth rates were slightly higher in Q2 2025 for both apps (+28% vs. +23% on iOS) and games (+1.7% vs. +0.2% 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 Q2 2025



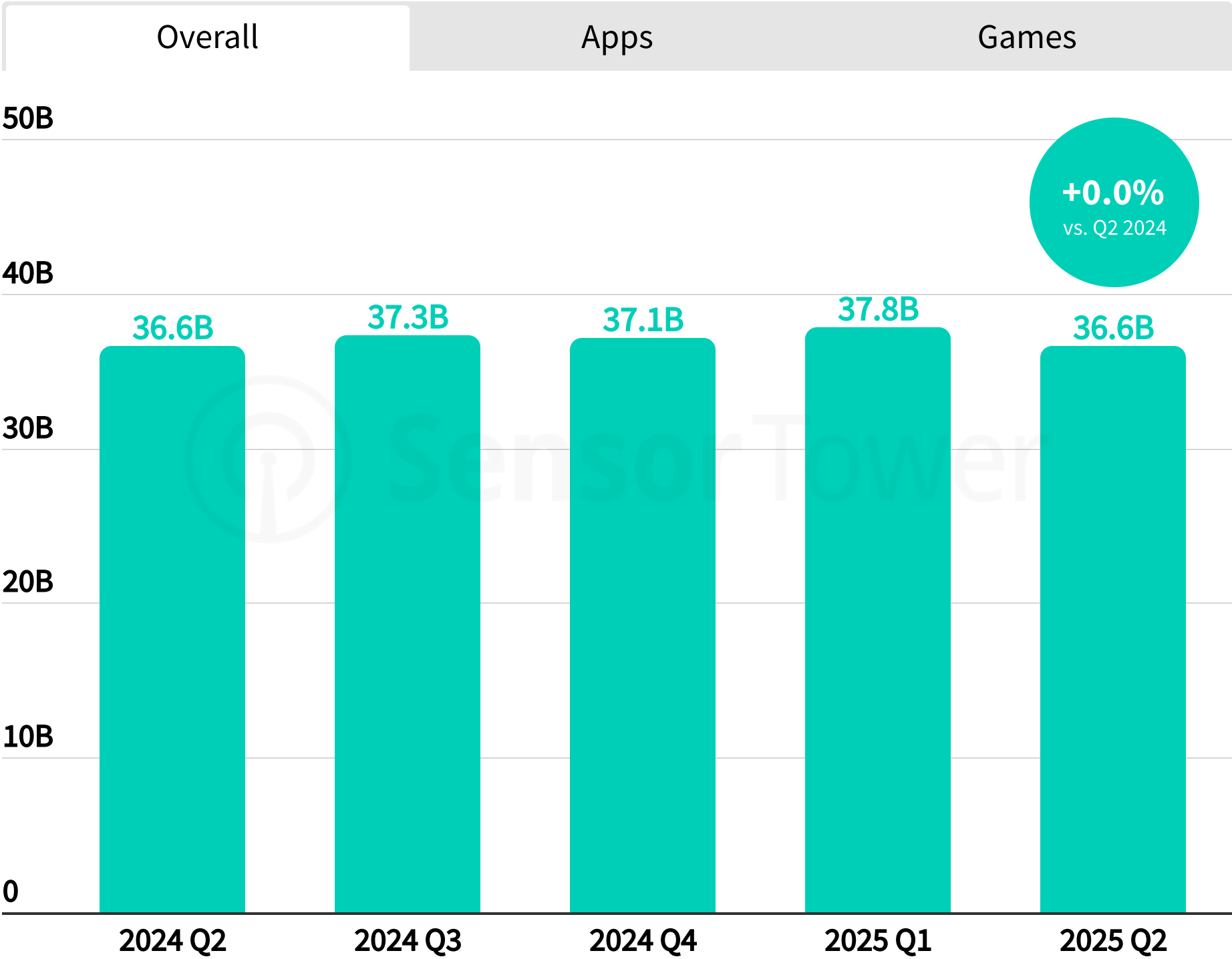
App Downloads Hold Steady — Though Digging Deeper Reveals Shifts in Demand

While overall app downloads held steady in Q2 2025, a deeper look reveals significant shifts in consumer demand. The era of rapid download growth in emerging markets and pandemic-era surges has leveled out, signaling a maturing market where most users have the apps they need.

To succeed, new apps must differentiate themselves. This is evident in the divergence of category performance: Non-gaming apps like Productivity and Utilities, buoyed by the rise of Generative AI, saw a 3.7% year-over-year (YoY) growth in downloads. In contrast, mobile game downloads declined by 6.8% YoY.

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

Quarterly Worldwide App Downloads Between Q2 2024 - Q2 2025
iOS and Google Play



Google Play Still Dominates Downloads While iOS Had Higher Growth

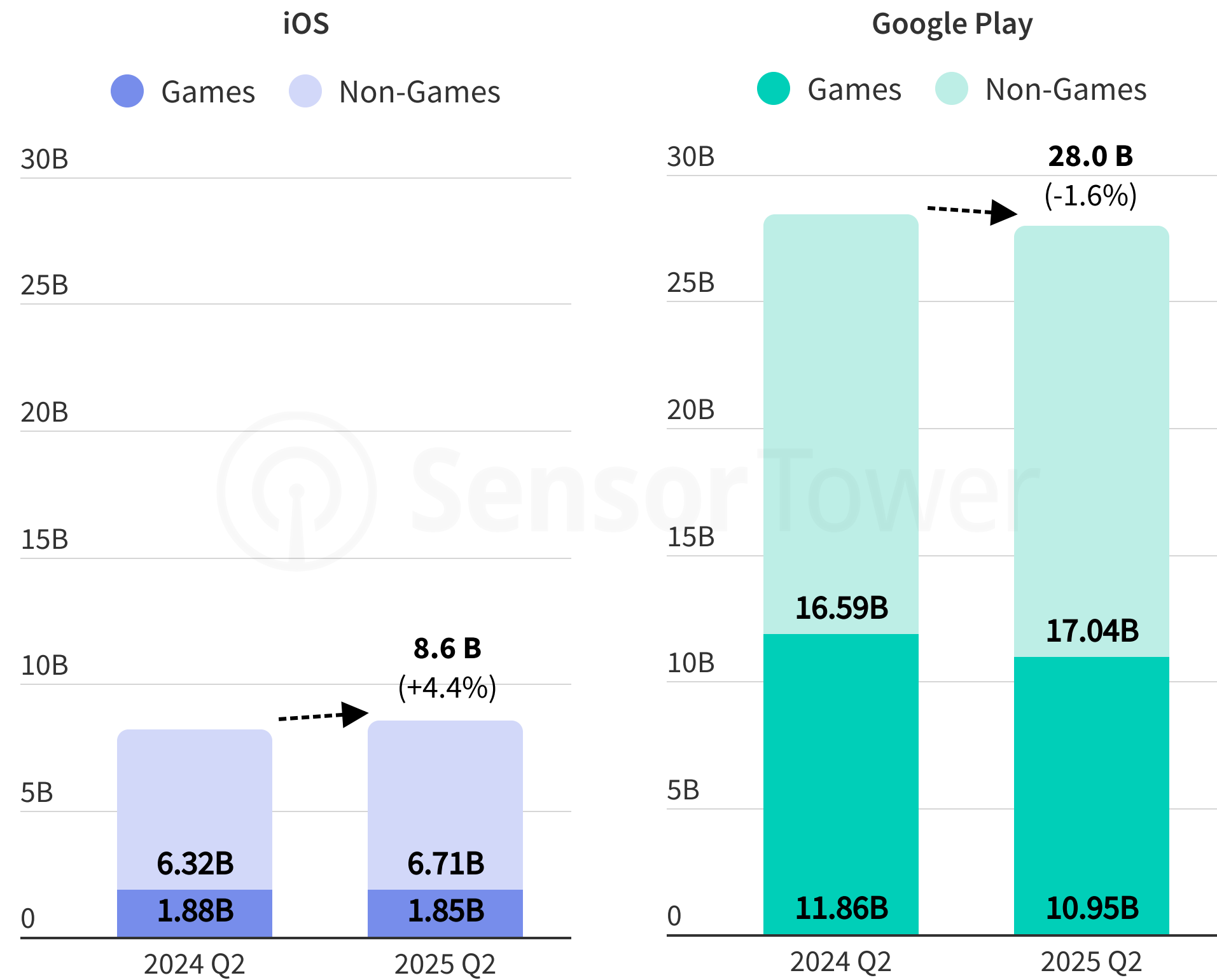
While iOS leads in monetization, Google Play still dominates in downloads. Google Play captured 77% of all downloads in Q2 2025, compared to iOS's nearly 70% share of in-app purchase revenue.

However, iOS is steadily closing the download gap with a strong 4.4% year-over-year growth, while Google Play saw a slight decline. This growth is particularly notable in markets like India, where iOS saw a download boost despite Android's historical dominance.

The driving force behind this positive growth on both platforms was non-gaming apps, while mobile game downloads saw a slight decline.

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

Worldwide App Downloads in Q2 2025



Q2 2025: **Top Markets**

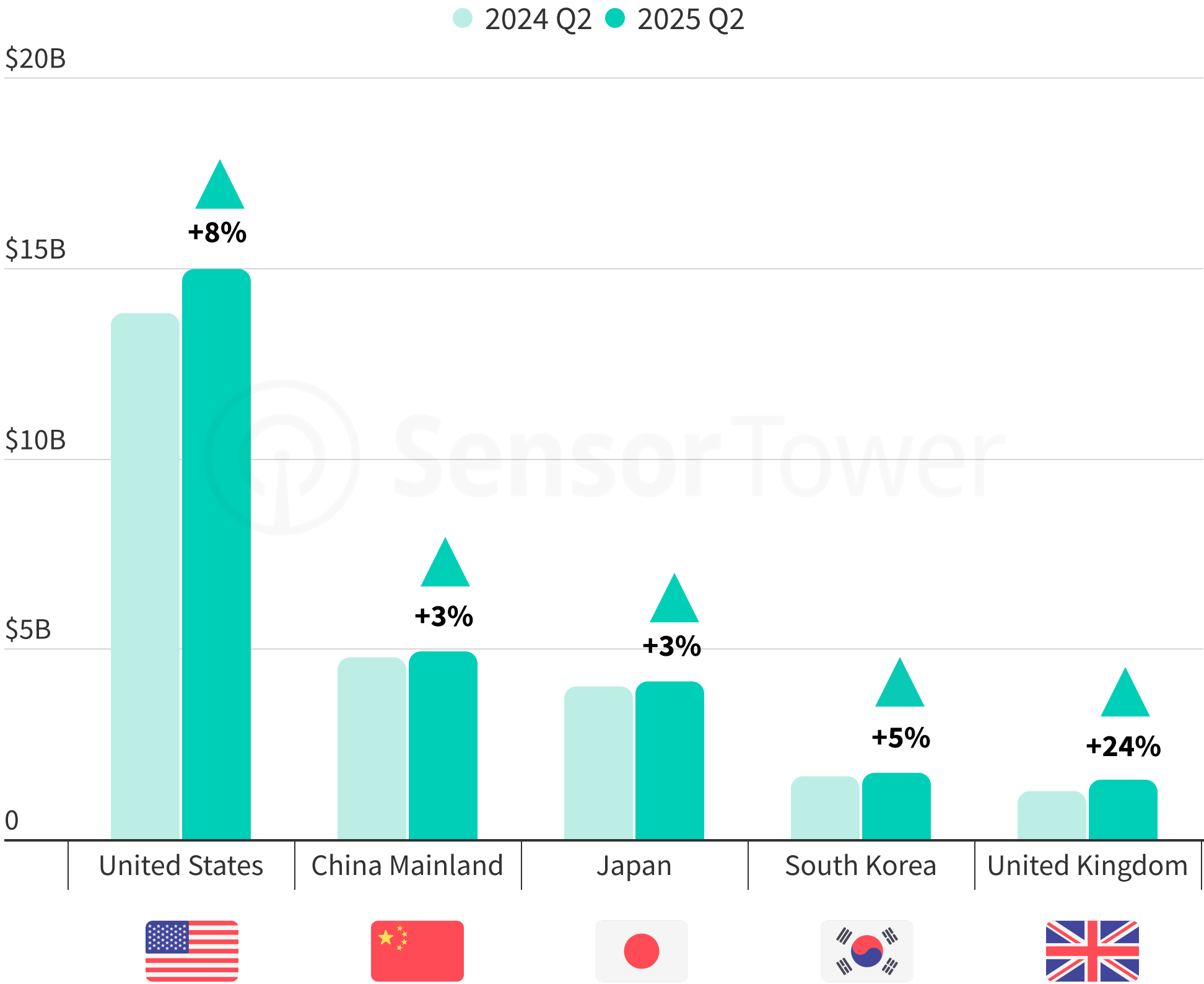
US Consumers Spent Nearly \$15 Billion on Mobile in Q2 2025

The United States remains the leading mobile market, with consumers spending nearly \$15 billion on in-app purchases in Q2 2025. This marks a healthy 8% YoY increase. The US market's strength is significant, generating more IAP revenue than the next four top markets combined.

While the US leads in total spending, the UK is a standout for growth, with a 24% YoY increase that matches Europe's regional growth rate as a whole. This growth far outpaced North America (+9% YoY) and Asia (+7% 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.

Top Markets by In-App Purchase Revenue in Q2 2025
iOS and Google Play



Europe and Latin America Fuel IAP Revenue Growth in 2025

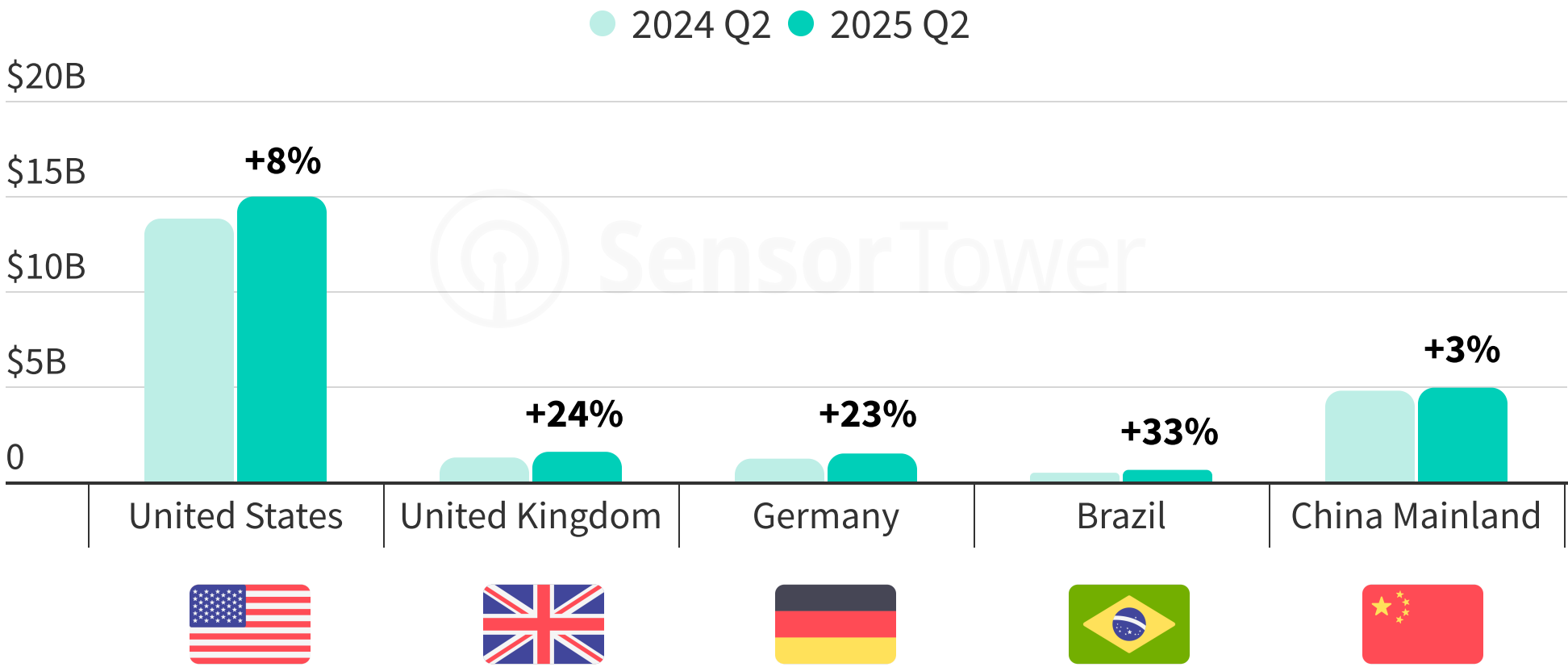
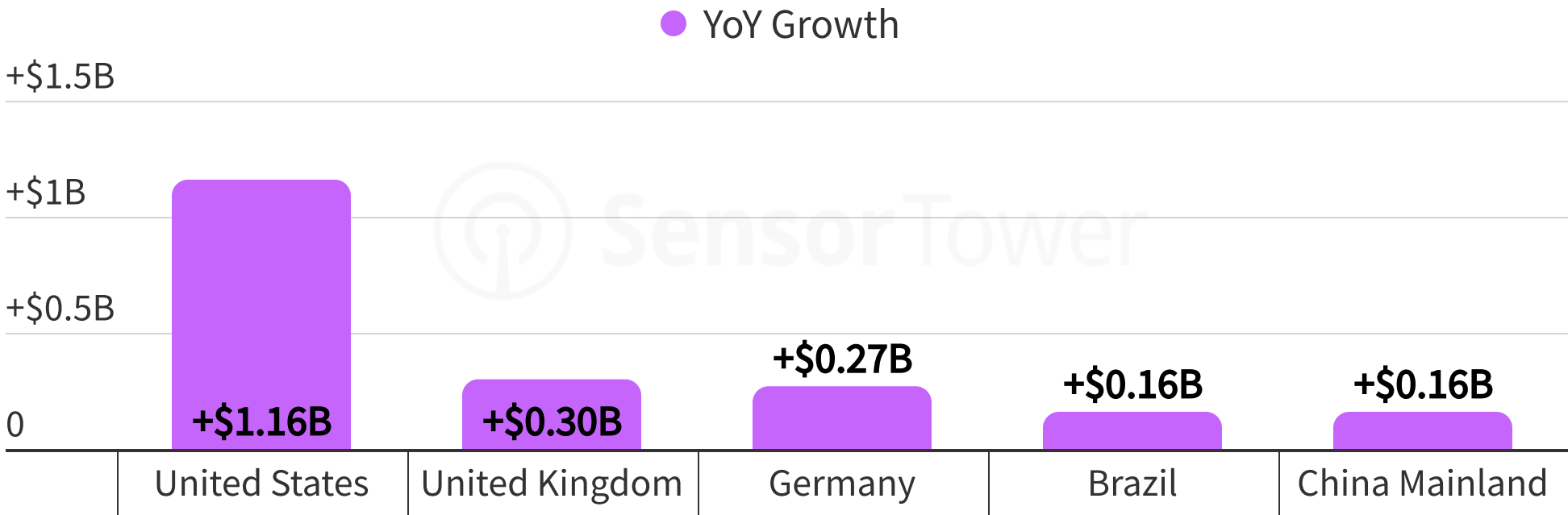
The United States led individual countries by adding \$1.16 billion in IAP revenue growth from Q2 2024 to Q2 2025, which surpassed the entire Asia region combined (+\$860 million over the same period).

However, Europe led all regions, adding nearly \$1.5 billion in new IAP revenue year-over-year, with significant contributions from the UK and Germany.

The Latin America region also stands out. Though still a relatively small market with \$1.6 billion in total IAP revenue in Q2 2025, it posted a remarkable 27% year-over-year (YoY) growth, fueled by Brazil's exceptional 33% growth rate. Its rapid expansion makes it a region to watch.

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 Q2 2025
iOS and Google Play



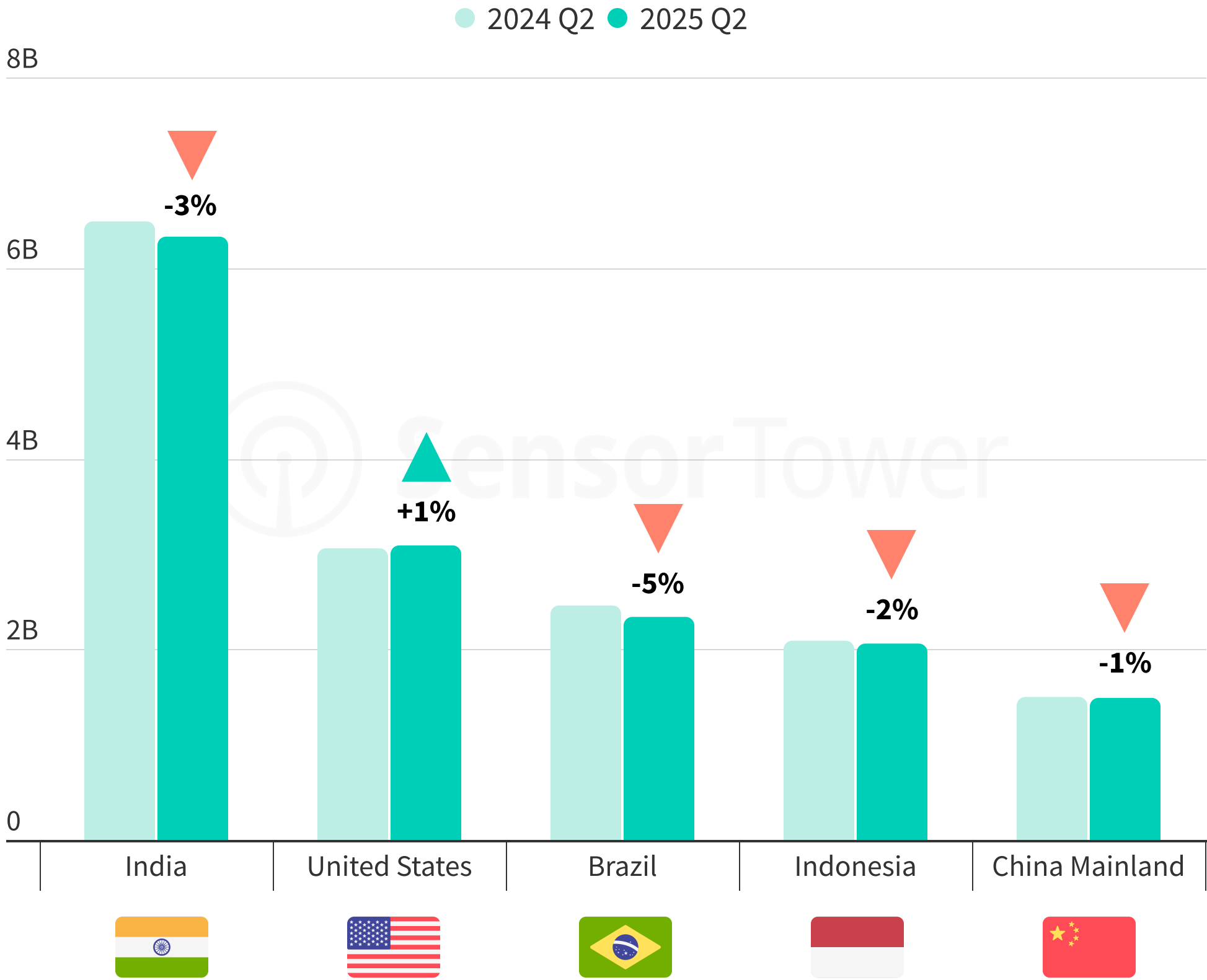
The US was a Rare Top Market with Positive Download Growth

The US was the only top market to see positive YoY download growth, a trend driven almost entirely by demand for Generative AI. Downloads for Generative AI apps in the US surged an impressive 68% YoY; without them, overall US downloads would have seen a slight decline.

Meanwhile, Brazil presents a case study in a maturing market. Its download decline stands in stark contrast to its 33% YoY IAP revenue growth. This signals a shift in consumer behavior, where users have many of the apps they need and are now spending more time and money on them, rather than seeking out new ones.

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

Top Markets by App Downloads in Q2 2025
iOS and Google Play



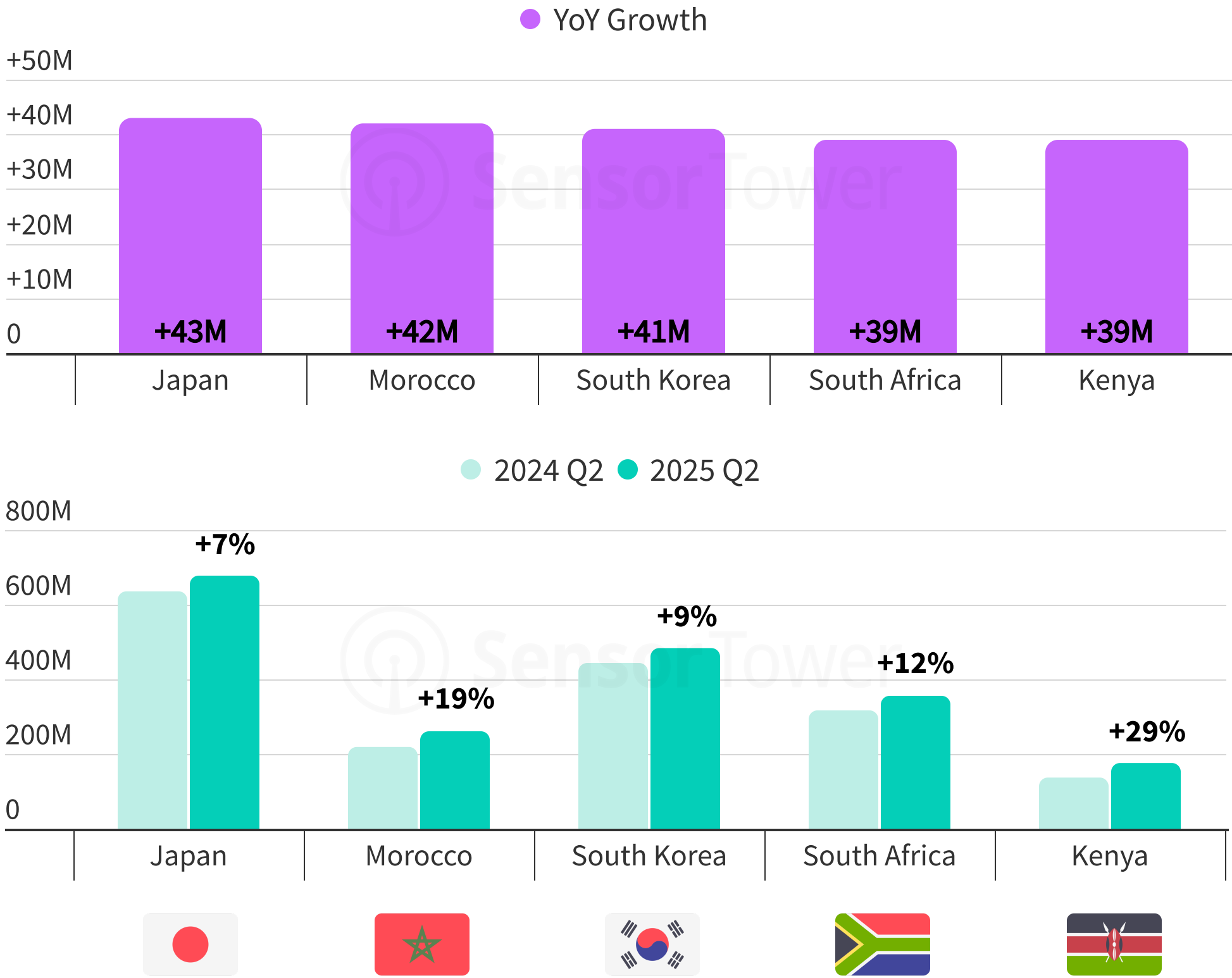
App Developers Turn to APAC and Africa to Find New Users

In APAC, Japan and South Korea saw a significant bounceback with positive download growth in Q2 2025. This was fueled by a strong increase in demand for Software apps, including Generative AI, Utilities, and Business & Productivity.

Africa is another major growth driver. The region as a whole achieved a robust 9% year-over-year (YoY) growth, a stark contrast to flat global growth. Its momentum is led by high-growth markets like Morocco, South Africa, and Kenya, which ranked among the top five fastest-growing markets in the world. Nigeria also showed strong performance, coming in at number six.

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

Top Breakout Markets by Year-over-Year Download Growth in Q2 2025
iOS and Google Play



Q2 2025: **Top Categories**

AI Fuels More than 50% Growth in Software App Revenue

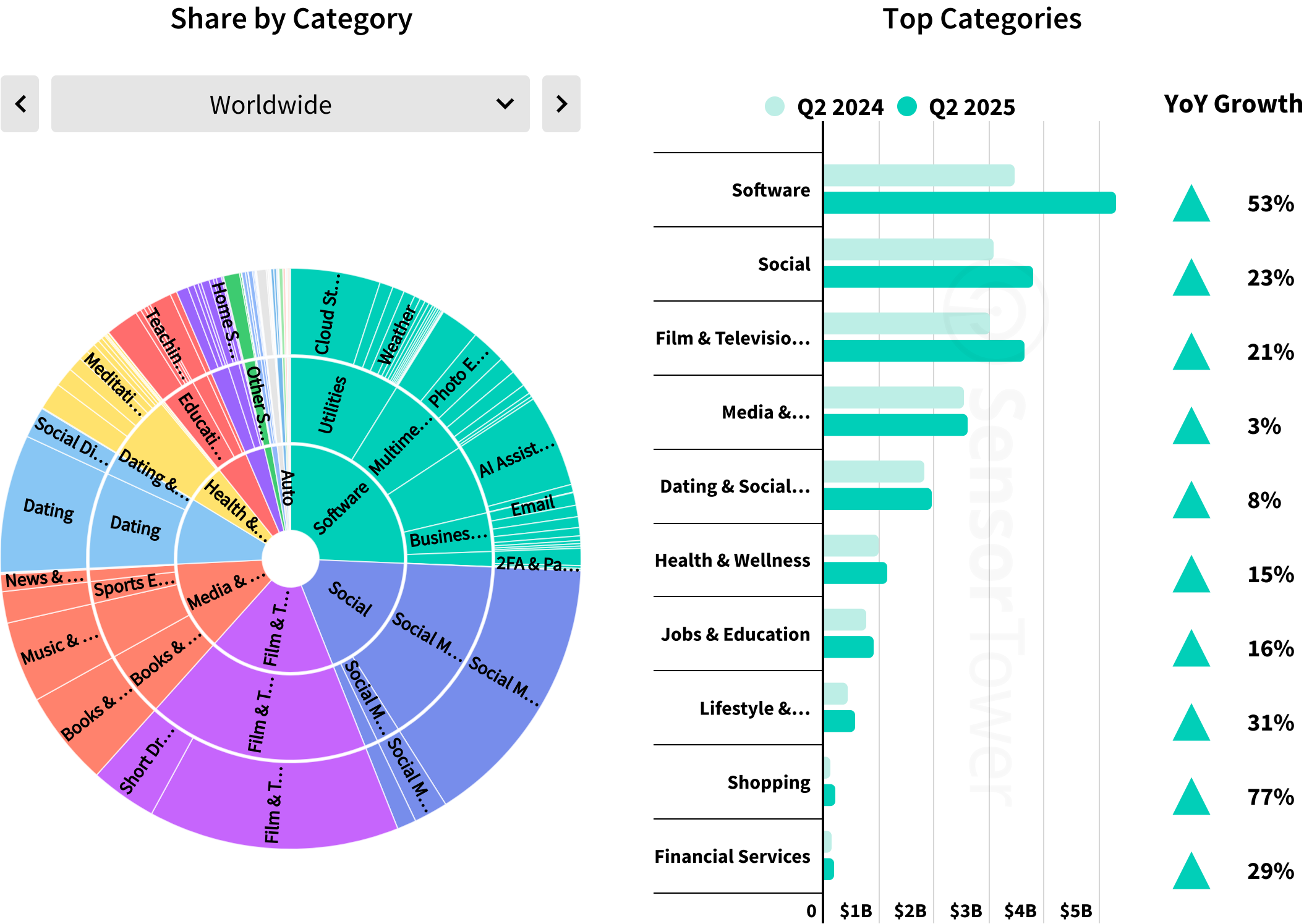
In-app purchase (IAP) revenue in non-games continued its rapid climb into 2025. The Software genre, including Generative AI, saw global revenue climb 53% YoY.

Software wasn't the only genre to see a nice boost from AI technology in Q2 2025. In fact, eight of the top 10 genres achieved at least 15% YoY growth, including more than 20% YoY growth for Social and Film & Television Streaming.

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 August 3, 2025.

Top App Genres by In-App Purchase Revenue in Q2 2025

iOS and Google Play



Short Drama Apps were Downloaded Nearly 500 Million Times in Q2 2025

While download growth was mixed across genres, Film & Television Streaming apps led the way, driven by the continued popularity of Short Drama apps. Short Drama apps accounted for a significant 43% of all downloads in the genre in Q2 2025, a dramatic increase from just 12% in Q2 2024.

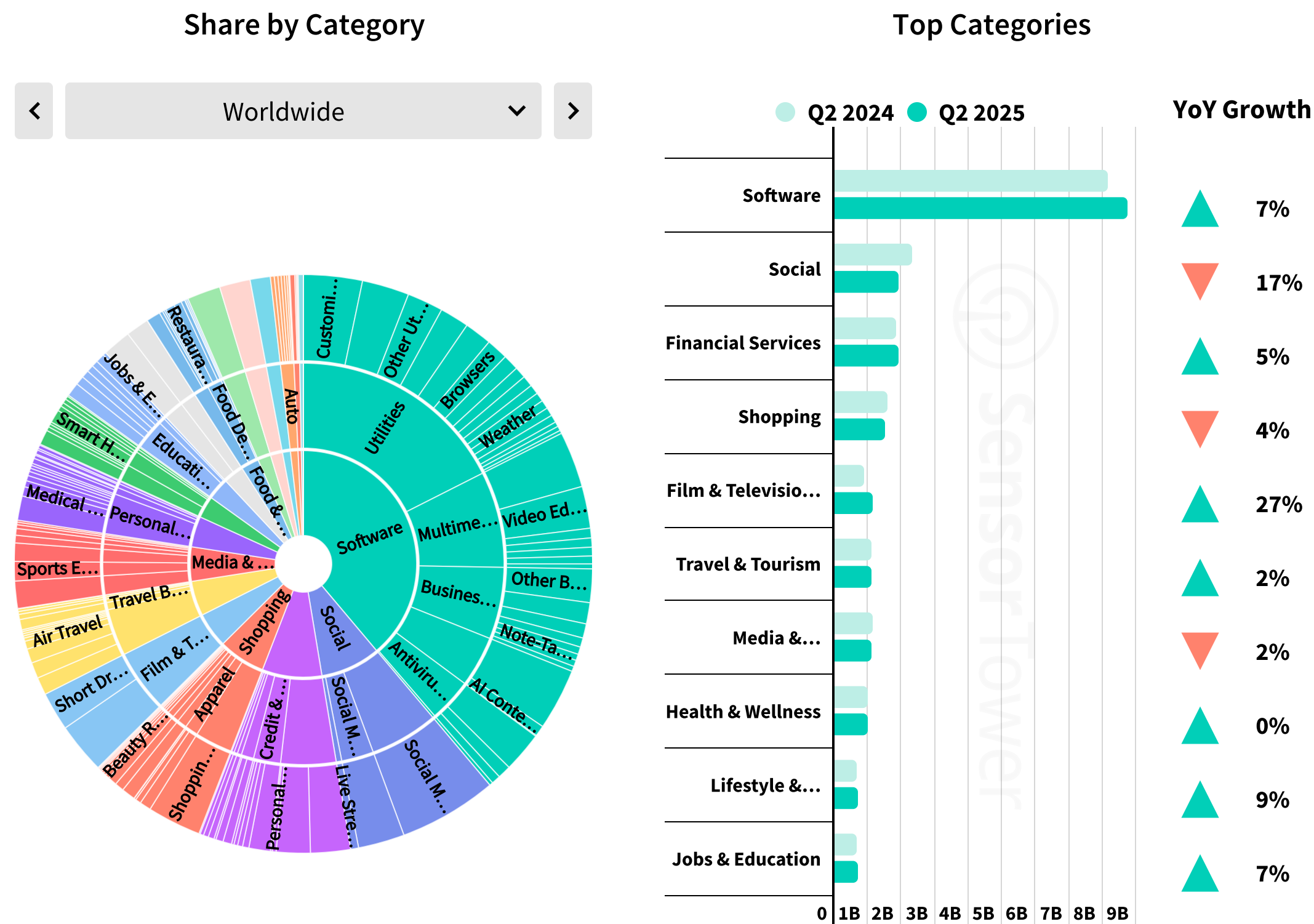
The impact of AI is also clear. Top apps in the Jobs & Education category that mentioned AI-related terms saw their downloads climb 19% year-over-year (YoY), outperforming apps that don't mention AI, which grew by 13% YoY.

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 August 3, 2025.

Top App Genres by Downloads in Q2 2025

iOS and Google Play



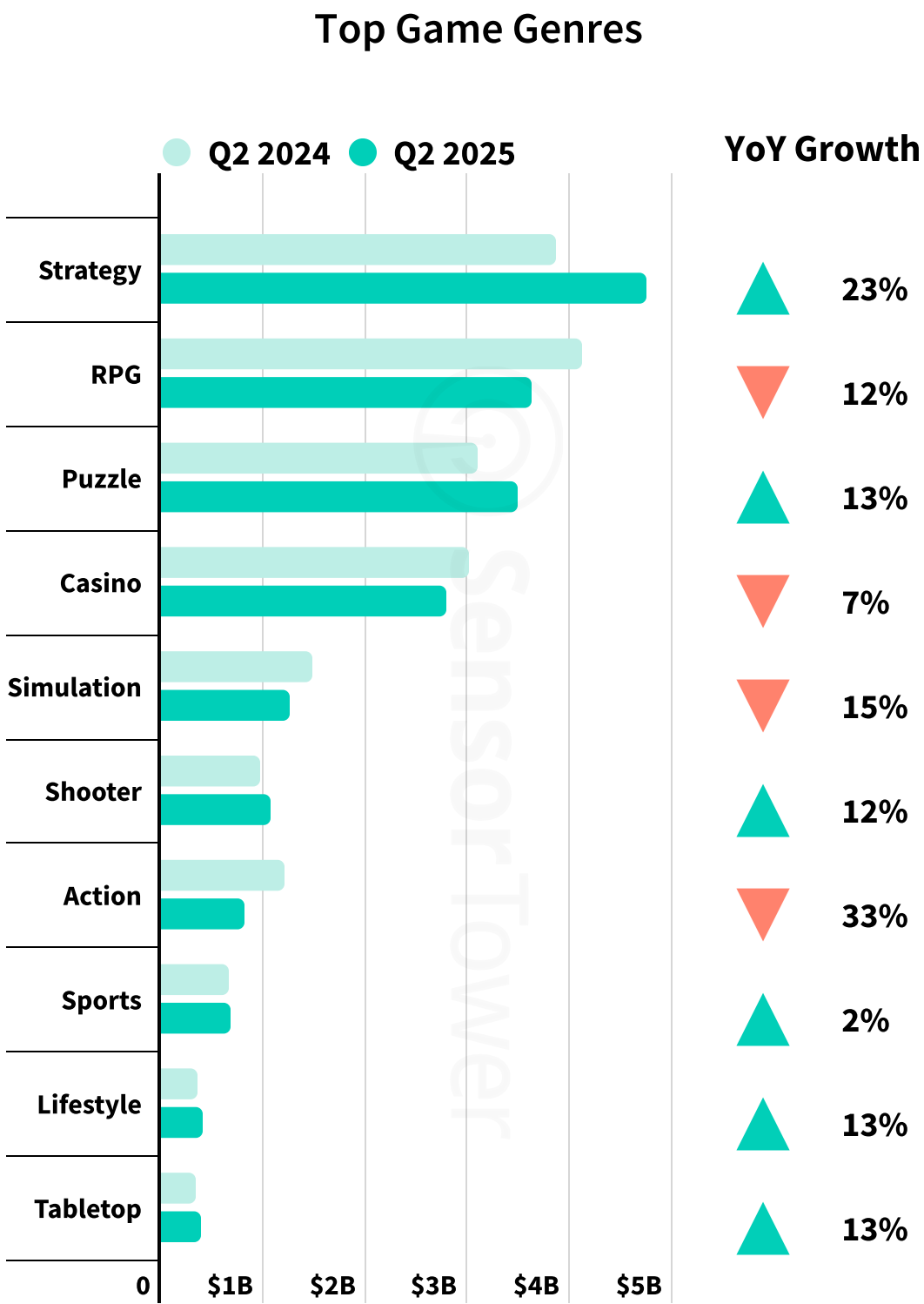
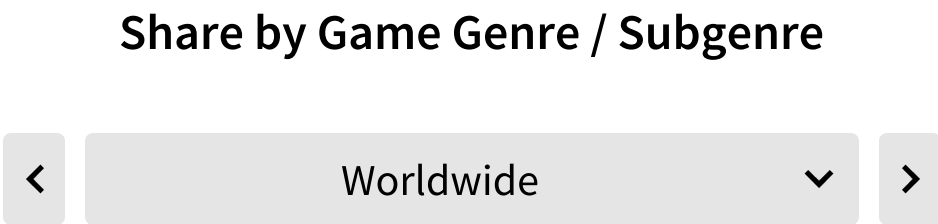
Strategy Pulls Away from RPG as the Top Mobile Game Genre

In a notable shift from a year ago, Strategy has surpassed RPG to become the leading mobile game genre, opening up a billion-dollar gap in IAP revenue. This growth was fueled by a strong 23% YoY increase, driven by subgenres like 4X Strategy, Card Battler, and Turn-Based Tactics. Breakout hits this quarter included SD Gundam G Generation ETERNAL and Kingshot.

While Strategy led the way, other genres also posted impressive growth. Puzzle, Shooter, Lifestyle, and Tabletop all achieved double-digit YoY growth.

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 August 3, 2025.

Top Game Genres by In-App Purchase Revenue in Q2 2025
iOS and Google Play



Simulation, Puzzle, and Arcade Genres Drive New Downloads

Simulation, Puzzle, and Arcade games each accounted for approximately 20% of total mobile game downloads, showing that casual games continue to drive the bulk of demand. Top breakout games from the quarter included Cookingdom (Simulation), Music Piano 7 (Arcade), and Royal Kingdom (Puzzle).

In stark contrast, Strategy was the only top genre to achieve positive YoY growth in Q2 2025, with downloads climbing 5% globally. As the leading genre for mobile monetization, this growth signals increasing competition and publisher focus on the space.

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 August 3, 2025.

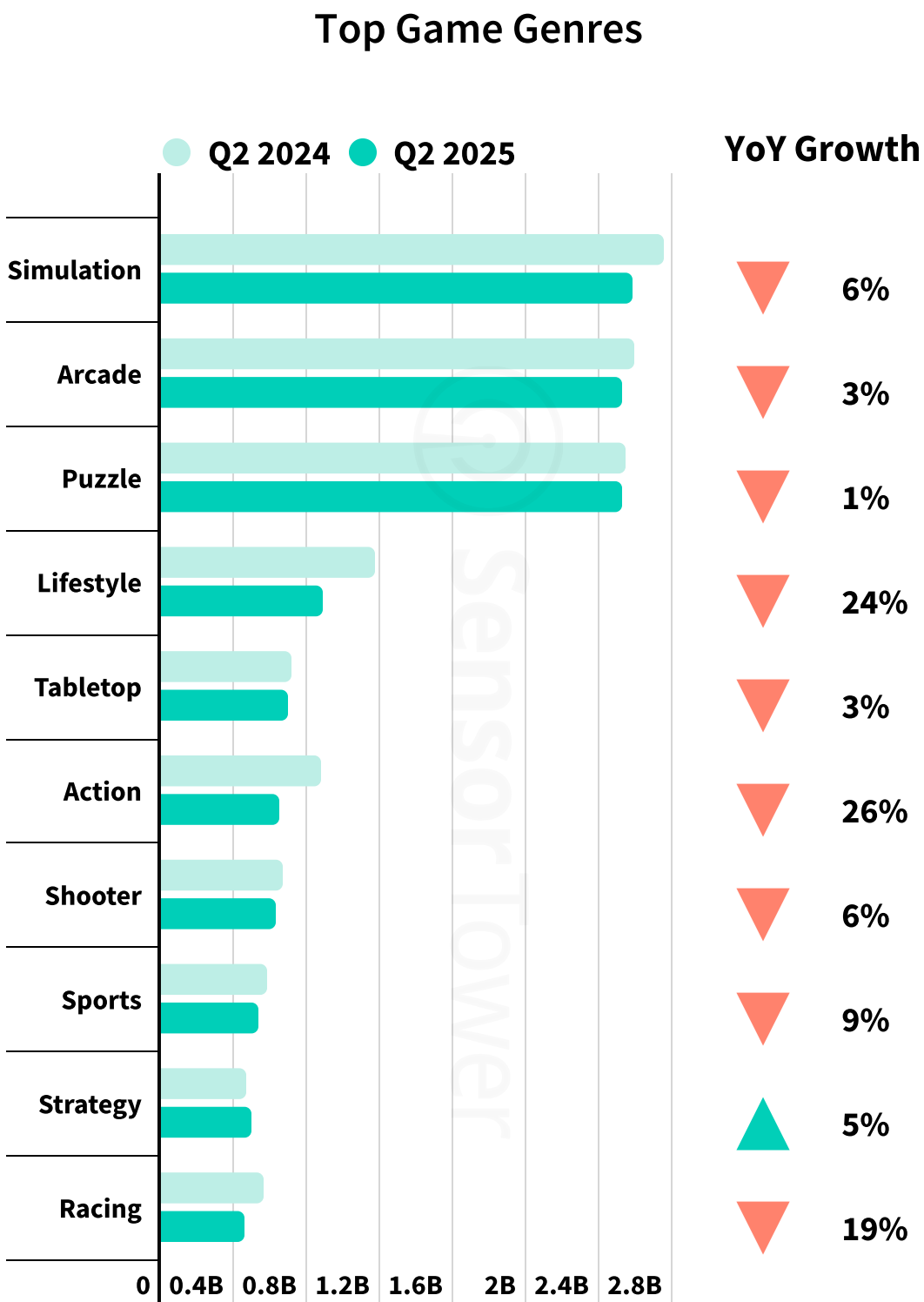
Top Game Genres by Downloads in Q2 2025
iOS and Google Play

Share by Game Genre / Subgenre

<

Worldwide

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Q2 2025: **Top Apps**

ChatGPT is Already a Top Five App in the World

ChatGPT became the fastest app ever to reach one billion downloads globally across iOS and Google Play. Its monetization has been equally impressive, as it entered the top five non-gaming apps by IAP revenue for the first time in Q2 2025, surpassing major players like Disney+ and Tinder.

TikTok remains the leader on mobile, ranking first in IAP revenue and second in downloads for the quarter. Its nearly \$1.7 billion in IAP revenue in Q2 2025 marked its second-best quarter to date and was more than double the revenue of any other app.

Source: Sensor Tower
Note: iOS and Google Play combined. iOS only for China. Excludes third-party Android
Change is vs. the previous quarter (Q1 2025).

Top Apps in Q2 2025 iOS and Google Play

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

Breakout Apps are Leaning into Two Key Trends: AI and Video

The top breakout apps of the quarter prominently feature either AI technology (like ChatGPT and PictureThis) or video streaming and editing (e.g., TikTok, CapCut, ReelShort). The rapid rise of Short Drama apps is a powerful example of how video has become the primary way to capture user attention on mobile.

In terms of revenue growth, AI Assistants and Short Drama apps are both experiencing explosive growth. AI Assistants earned \$1.15 billion in IAP revenue in Q2 2025 (up \$840 million year-over-year), while Short Drama apps generated \$760 million (up \$470 million year-over-year).

Source: Sensor Tower
Note: iOS and Google Play combined. iOS only for China. Excludes third-party Android
Change is vs. the previous quarter (Q1 2025).

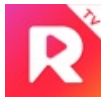
Top Breakout Apps by Growth in Q2 2025 vs. Q1 2025 iOS and Google Play

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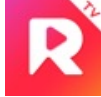
Worldwide

>

In-App Purchase Revenue

Breakout Rank	Current Quarter Rank	Change	App Name
1	4	▲ 2	 ChatGPT
2	1	=	 TikTok
3	2	▲ 1	 Google One
4	8	▲ 3	 CapCut
5	19	▲ 2	 ReelShort
6	55	▲ 93	 PictureThis
7	7	=	 HBO Max
8	49	▲ 44	 NetShort
9	50	▲ 38	 GameChanger
10	29	▲ 2	 Gmail

Downloads

Breakout Rank	Current Quarter Rank	Change	App Name
1	1	▲ 3	 ChatGPT
2	16	▲ 77	 Kuku TV
3	25	▲ 202	 RapidTV
4	79	NEW	 Edits
5	142	▲	 File Recovery - Photo Recovery
6	111	▲	 ToonMe
7	57	▲ 166	 UpFoto
8	54	▲ 121	 NetShort
9	21	▲ 18	 ReelShort
10	129	▲	 DAZN

Q2 2025: **Top Games**

Top Games in Q2 2025

Included Many Familiar Titles

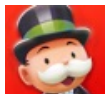
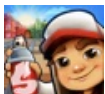
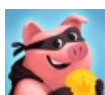
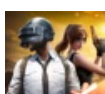
In Q2 2025, no recent game launches broke into the top 10 by IAP revenue, continuing a familiar pattern. With it becoming more challenging than ever for new games to find success, many publishers have shifted their focus to investing in and maintaining their older, established titles rather than attempting to launch new ones.

The top games by downloads also included many older titles. The only recent exception was Delta Force, a shooter game from Tencent that originally launched in China in late 2024 and expanded to other markets in April 2025.

Source: Sensor Tower
Note: iOS and Google Play combined. iOS only for China. Excludes third-party Android
Change is vs. the previous quarter (Q1 2025).

Top Games in Q2 2025

iOS and Google Play

< Worldwide ▾ >					
In-App Purchase Revenue			Downloads		
Rank	Change	App	Rank	Change	App
1	=	 Last War: Survival	1	▲ 2	 Block Blast!
2	=	 Royal Match	2	▼ 1	 Garena Free Fire
3	=	 Whiteout Survival	3	▼ 1	 Roblox
4	=	 MONOPOLY GO!	4	=	 Subway Surfers
5	=	 Honor of Kings	5	=	 Ludo King
6	=	 Candy Crush Saga	6	▲ 1	 Pizza Ready!
7	▲ 2	 Coin Master	7	▲ 693	 Delta Force
8	=	 Pokémon TCG Pocket	8	=	 Hole.io
9	▲ 1	 Game for Peace	9	▼ 3	 PUBG MOBILE
10	▼ 3	 Roblox	10	▲ 4	 EA SPORTS FC Mobile Soccer

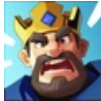
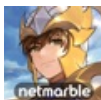
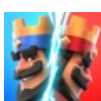
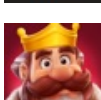
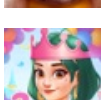
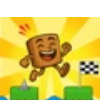
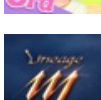
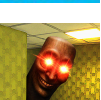
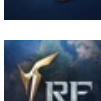
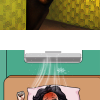
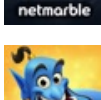
Breakout Games are Dominated by Developers from Asia and Europe

All of the top breakout games by IAP revenue growth were from either Asia or Europe. Top examples include SD Gundam G Generation ETERNAL (BANDAI NAMCO, Japan), Kingshot (Century Games, China), Seven Knights Re:BIRTH (Netmarble, South Korea), Clash Royale (Supercell, Finland), and Mabinogi Mobile (NEXON, Japan).

This trend also holds true for downloads. The top breakout games by downloads were also from publishers in Asia and Europe, such as Delta Force (Tencent, China), Cookingdom (ONESOFT, Vietnam), Music Piano 7 (Melodya Music, Vietnam), Royal Kingdom (Dream Games, Turkey), and Merge Fellas (TapMen, Romania).

Source: Sensor Tower
Note: iOS and Google Play combined. iOS only for China. Excludes third-party Android
Change is vs. the previous quarter (Q1 2025).

Top Breakout Games by Growth in Q2 2025 vs. Q1 2025 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	26	NEW		SD Gundam G Generation ETERNAL	1	7		693	Delta Force
2	27		418	Kingshot	2	11			Cookingdom
3	39	NEW		Seven Knights Re:BIRTH	3	16		510	Music Piano 7
4	22		32	Clash Royale	4	26		395	Royal Kingdom
5	66		878	Mabinogi Mobile	5	69			Merge Fellas
6	38		45	Royal Kingdom	6	51		987	Kingshot
7	11		8	Gossip Harbor	7	72			Brainrot Mini Challenge
8	24		14	Lineage M	8	70			Meme Bots Brainrot Chase Rooms
9	75		243	RF ONLINE NEXT	9	24		158	Brainy Prankster
10	94			Disney Solitaire	10	97			Meme Merge

Q2 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 June 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+.

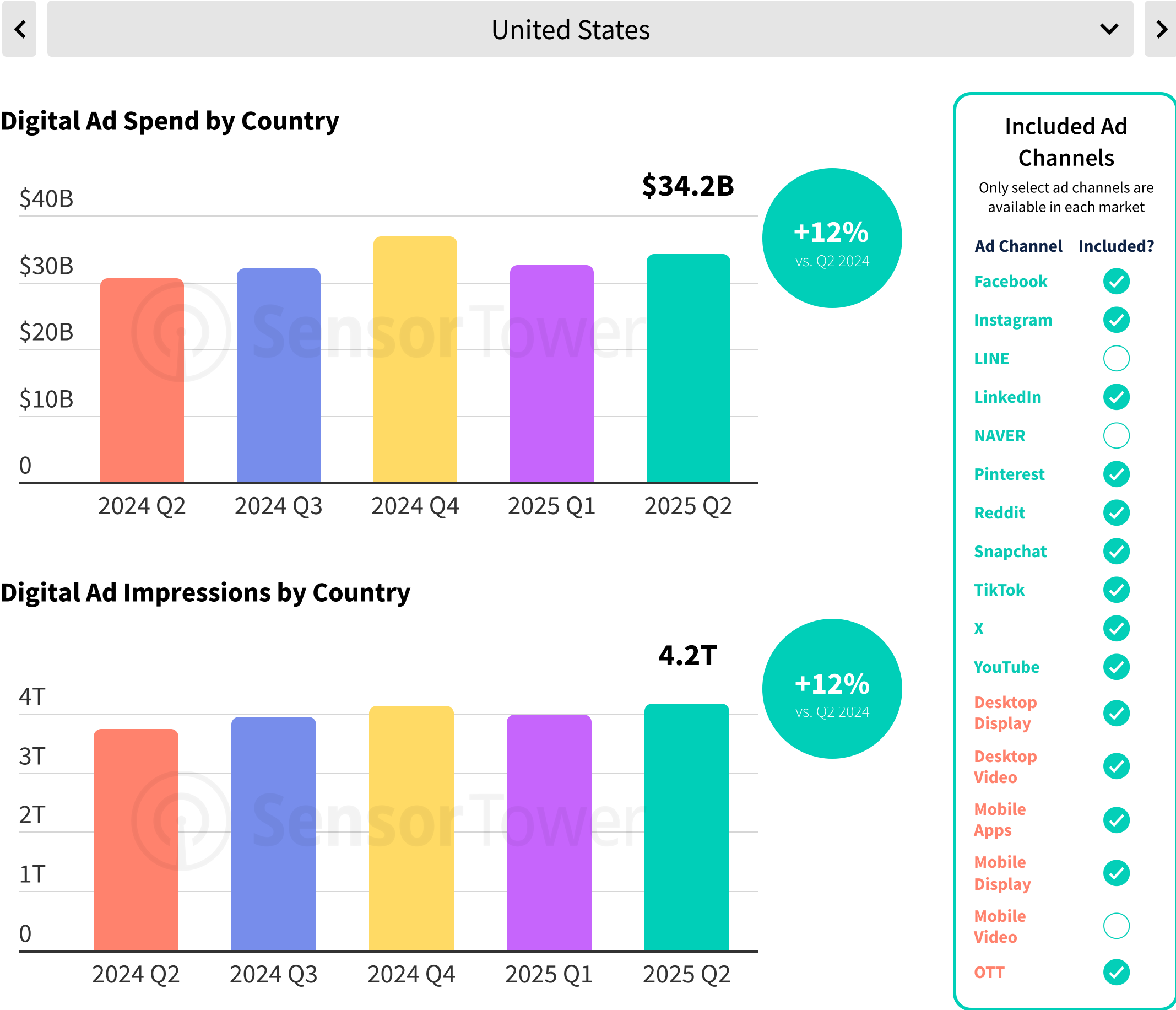


The United States Digital Advertising Market Grows 12% Year-over-Year

Digital ad spend in the United States across mobile, desktop, and OTT reached \$34 billion in Q2 2025 with a record-high 4.17 trillion impressions. Spend was just a bit behind Q4 when advertising typically peaks in the US around the holiday season. The digital ad market shows no signs of slowing down as both spend and impressions achieved 12% growth YoY. Note that US advertising now includes in-app advertising!

The top markets by digital ad spend growth included South Korea (+21% YoY), Brazil (+18%), and Mexico (+16%). And be sure to check out India, the latest available market. 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 August 6, 2025. Available ad channels vary by market. See Appendix (page 42) for list of ad channels included in each market.



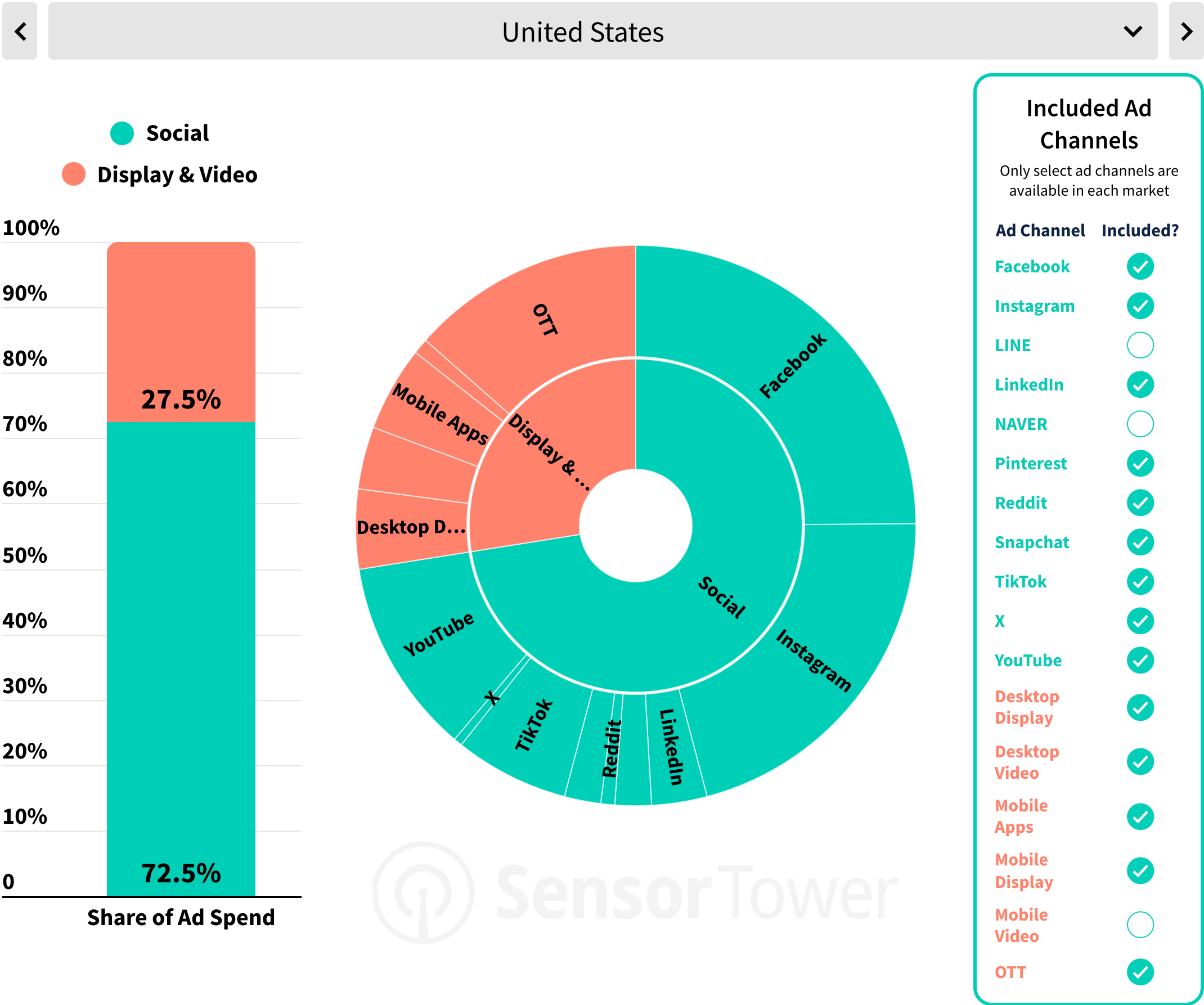
Social Accounted for More than 70% of Digital Ad Spend in the US

Among included digital ad channels in the US, social networks accounted for 72.5% of ad spend, led by Facebook, Instagram, and YouTube. Note that the top channels vary by market, with new additions to this report this quarter including NAVER in South Korea and LINE in Japan.

Still, a significant amount of ad spend went to other channels. OTT took 13.5% share, more than that from YouTube, and mobile apps took nearly 5% share.

Source: Sensor Tower
Note: Includes a selection of advertising channels. Ad spend estimates as of August 6, 2025. Available ad channels vary by market. See [Appendix \(page 42\)](#) for list of ad channels included in each market.

Share of Digital Ad Spend by Channel in Q2 2025



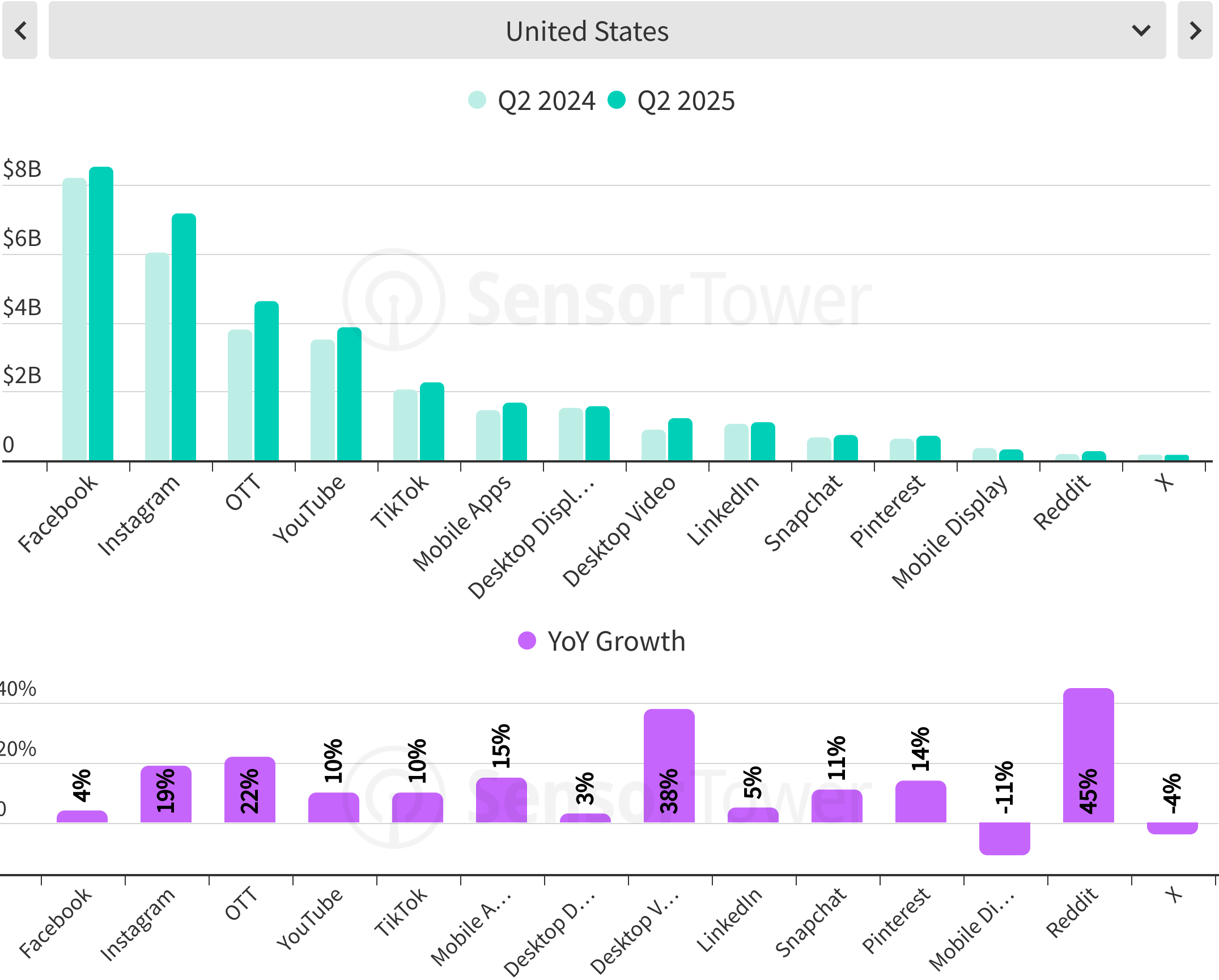
OTT and Reddit were Among the Fastest Growing Ad Channels in the US

Reddit, a still relatively small but rapidly growing channel, was the fastest-growing platform in Q2 2025. Some of this growth may be attribute to increased traffic from chatbots, which frequently cite Reddit in their responses. According to [Sensor Tower's Web Insights](#), Reddit web visits in the US climbed 28% YoY in Q2 2025.

OTT also posted another quarter of strong performance, with a 22% year-over-year (YoY) increase. Among social channels, Reddit's impressive growth rate was followed by Instagram (+19% YoY) and Pinterest (+14% YoY).

Source: Sensor Tower
Note: Includes a selection of advertising channels. Ad spend estimates as of August 6, 2025. Available ad channels vary by market. See [Appendix \(page 42\)](#) for list of ad channels included in each market.

Year-over-Year Digital Ad Spend Growth by Channel in Q2 2025



US Shopping and CPG Ad Spend Declines as International Retailers Pull Back Spend

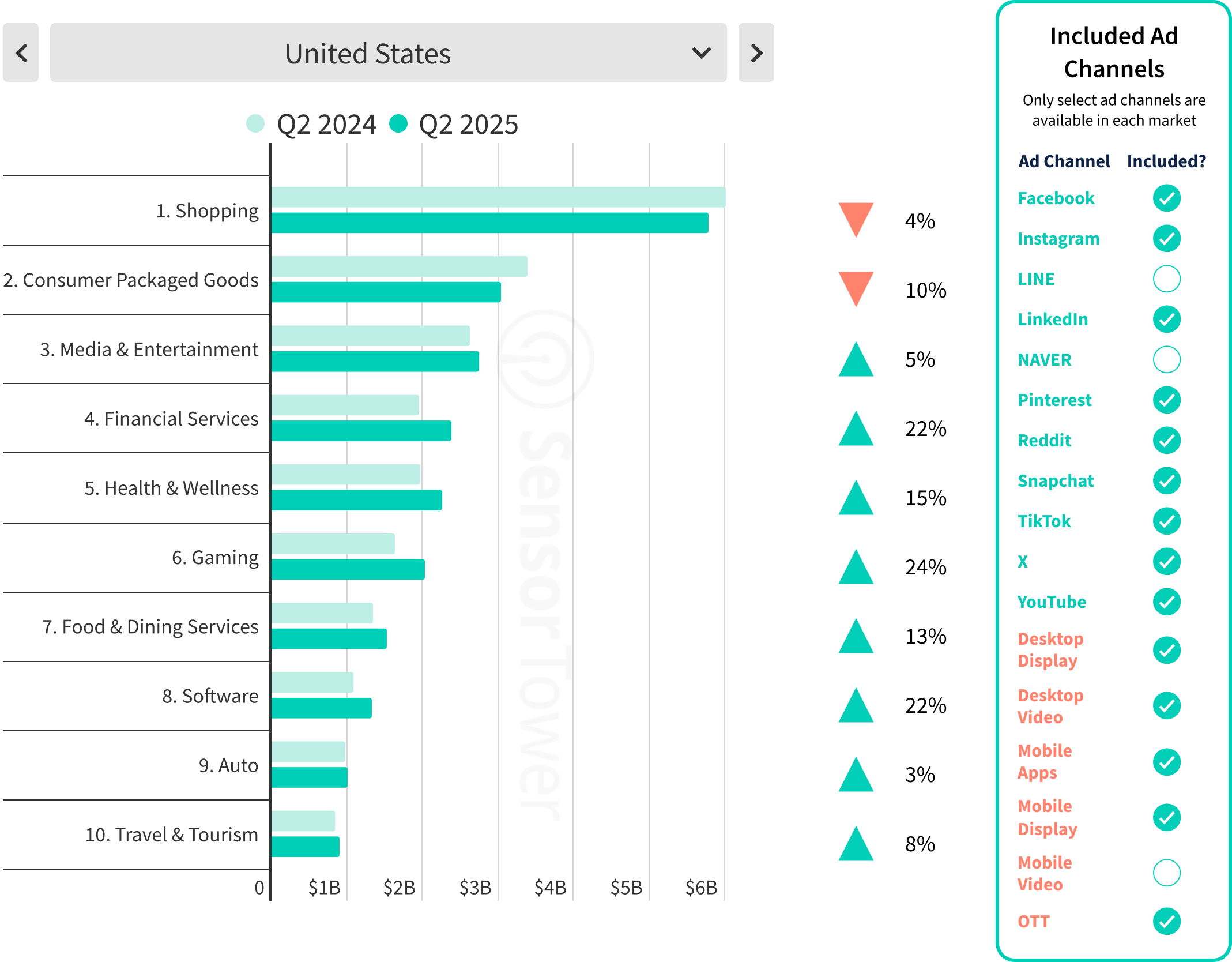
Chinese-backed retailers like Temu and SHEIN have significantly reduced their US ad spending amid concerns over tariffs, instead redirecting their investments to other markets in Europe, Asia, and Latin America. The recent end of the "de minimis exemption" will likely only accelerate this shift.

Consumer Packaged Goods (CPG) ad spend also saw a decline, driven by a particularly large 25% year-over-year (YoY) drop in the Household Supplies subcategory.

These declines were offset by increased ad spend in other categories, including Gaming, Financial Services, and Software, which maintained the overall growth of the US market.

Source: Sensor Tower
Note: Includes a selection of advertising channels. Ad spend estimates as of August 6, 2025. Available ad channels vary by market. See [Appendix \(page 42\)](#) for list of ad channels included in each market.

Top Categories by Digital Ad Spend in Q2 2025



The AI Market is Heating Up

Microsoft, Adobe Systems, and Google all broke into the top 10 US advertisers in Q2 2025 as they heavily promoted their respective AI products. For Microsoft, Copilot was its second-largest brand by ad spend, ranking only behind Activision Blizzard. Similarly, Google AI was Google's number two brand, trailing only Android.

While the top four advertisers remained the same, their spending fluctuated significantly. Amazon.com increased its ad spend by 5% quarter-over-quarter (QoQ), but Comcast (-29% QoQ) and Procter & Gamble (-14% QoQ) saw notable declines.

Source: Sensor Tower
Note: Includes a selection of advertising channels. Ad spend estimates as of August 6, 2025. Available ad channels vary by market. See [Appendix \(page 42\)](#) for list of ad channels included in each market.

Top Advertisers by Digital Ad Spend in Q2 2025

United States		
Rank	Advertiser	Change vs. 2025 Q1
1	Amazon.com	=
2	The Walt Disney Company	=
3	Procter & Gamble	=
4	Comcast Corporation	=
5	Microsoft	▲ 7
6	Kenvue Inc. - (ケンビューー)	▲ 8
7	Adobe Systems	▲ 4
8	Google	▲ 19
9	Paramount	▼ 3
10	Progressive Casualty Insurance Company	▼ 1

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	✓

The Coca-Cola Company Ramps Up Spend as the Weather Warms Up

The Coca-Cola Company was the top breakout advertiser in Q2 2025, increasing its US ad spend by more than 170% quarter-over-quarter (QoQ) to promote its key brands like Coke, Sprite, and Glaceau VitaminWater. Its ad spend was concentrated in major states, with California accounting for 11.3% of its total spend, followed by Texas (7.7%) and New York (5.0%).

In the mobile gaming space, Dream Games and Century Games were also among the top breakout advertisers. Dream Games launched a major campaign for its new 4X Strategy game, Kingshot, using a diverse ad channel approach with at least 10% of its spend going to Instagram, YouTube, Facebook, TikTok, and other mobile apps.

Source: Sensor Tower
Note: Includes a selection of advertising channels. Ad spend estimates as of August 6, 2025. Available ad channels vary by market. See [Appendix \(page 42\)](#) for list of ad channels included in each market.

Top Breakout Advertisers by Digital Ad Spend Growth in Q2 2025 vs. Q1 2025

United States			
Rank	Advertiser	Rank in 2025 Q2	Change vs. 2025 Q1
1	The Coca-Cola Company	19	▲ 67
2	Google	8	▲ 19
3	Microsoft	5	▲ 7
4	Eli Lilly and Company	18	▲ 25
5	Dream Games	29	▲ 31
6	Home Depot	38	▲ 35
7	Century Games	69	▲▲ 221
8	Kenvue Inc. - (ケンビュウ)	6	▲ 8
9	Target	26	▲ 23
10	Grupo Modelo	72	▲▲ 203

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	✓

Q2 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

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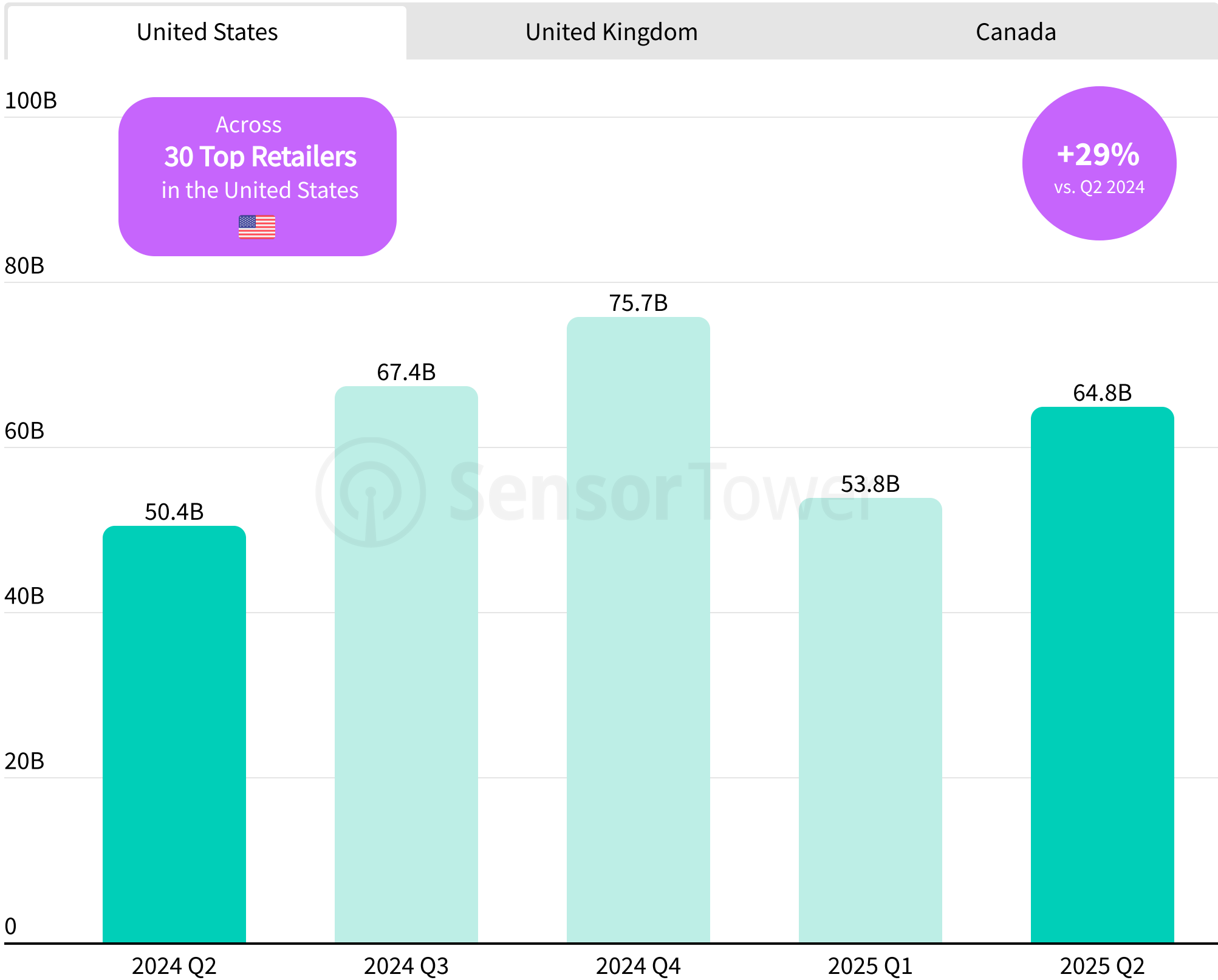
Retail Media is Becoming an Increasingly Important Ad Channel

Retail media ad impressions in the US climbed 29% YoY to approach 65 billion across top retailers like Walmart and Chewy. Note that Amazon.com has been excluded from this chart since data is available in Sensor Tower starting January 1, 2025.

For the first time in this Digital Market Index report, we've included retail media impressions across select retailers in the United Kingdom and Canada. Discover how retail media is trending in those markets!

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 \(page 43\)](#) for list of retailers included in each market.

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



Amazon is the Runaway Leader for Retail Media in the US

Amazon had nearly 80 billion retail media impressions in Q2 2025, surpassing the other 30 included retailers combined. The majority of these impressions were onsite, meaning they were displayed on Amazon.com rather than offsite channels like Facebook or OTT.

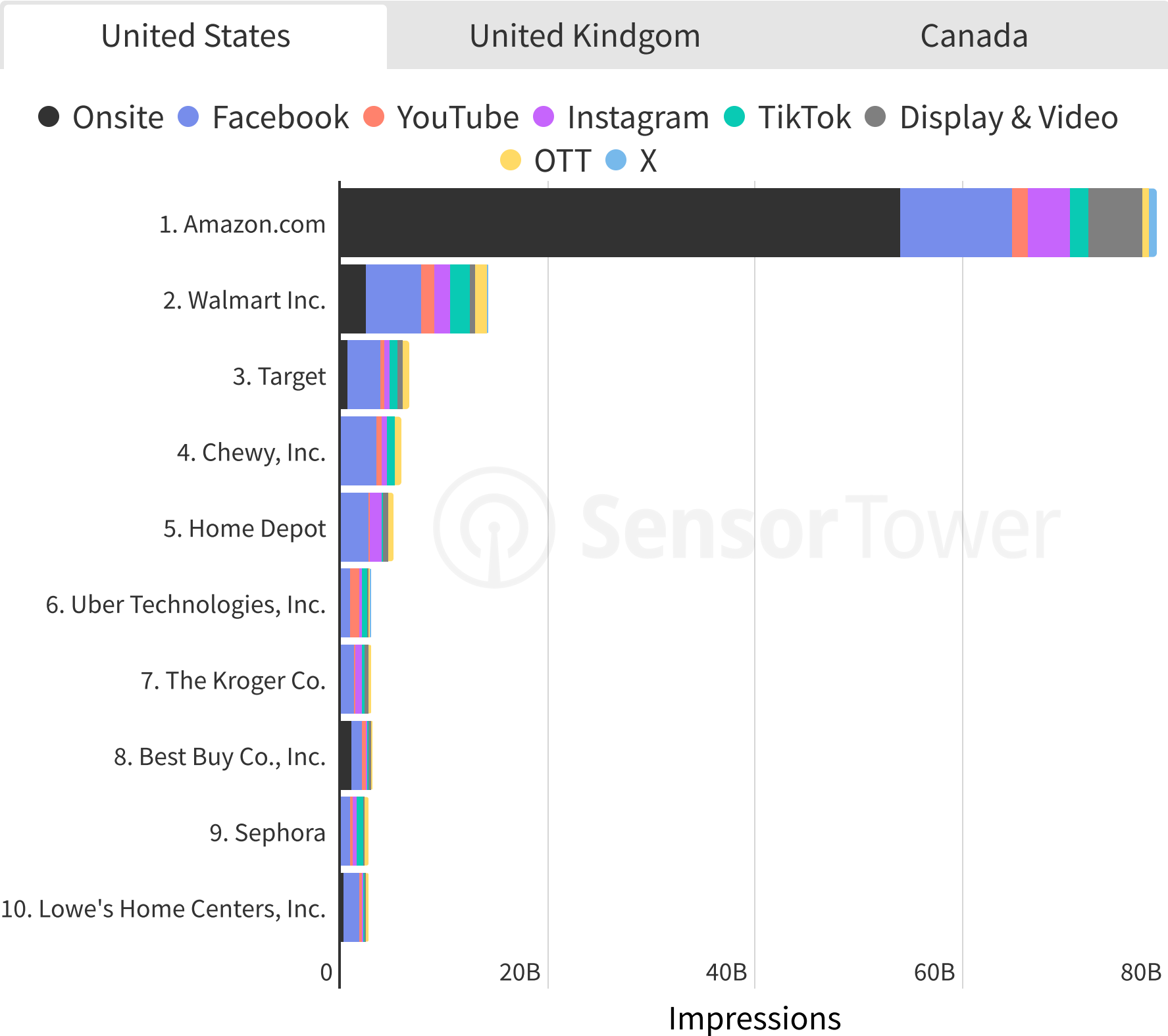
Facebook was the top offsite retail media channel for each of the top 10 retailers in the US. Instagram was popular for Home Depot and Kroger, while TikTok was a top channel for Sephora and Uber, suggesting these retailers are trying to reach a younger demographic.

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 \(page 43\)](#) for list of retailers included in each market.

Top Retail Media Retailers by Impressions
Q2 2025



Personal Care and Home & Garden are the Most Competitive Retail Media Categories

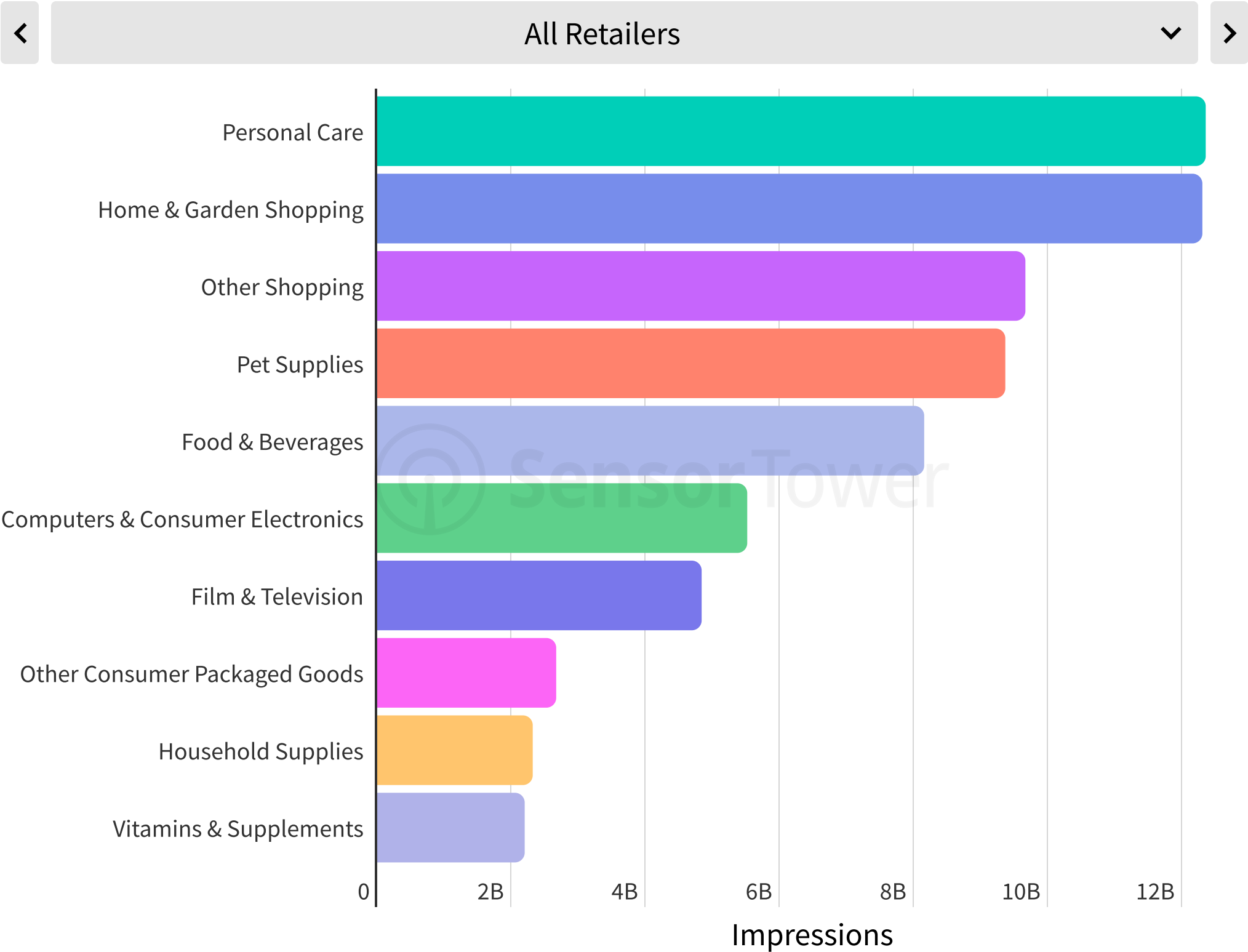
With over 12 billion impressions apiece in the US, Personal Care and Home & Garden are popular categories for retail media. While Amazon was the leader across most categories, accounting for nearly half of the Personal Care impressions, Home Depot and Lowe's were significant contributors to Home & Garden advertising.

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 \(page 43\)](#) for list of retailers included in each market.

Top Categories by Retail Media Advertising Impressions in the United States
Q2 2025



Amazon and Walmart are Popular Retailers Across Categories

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

While these giants hold broad appeal, other categories are popular for more specialized retailers. This includes Pet Supplies, where Chewy, PetSmart, and Petco are key players, and Computers & Consumer Electronics (Best Buy).

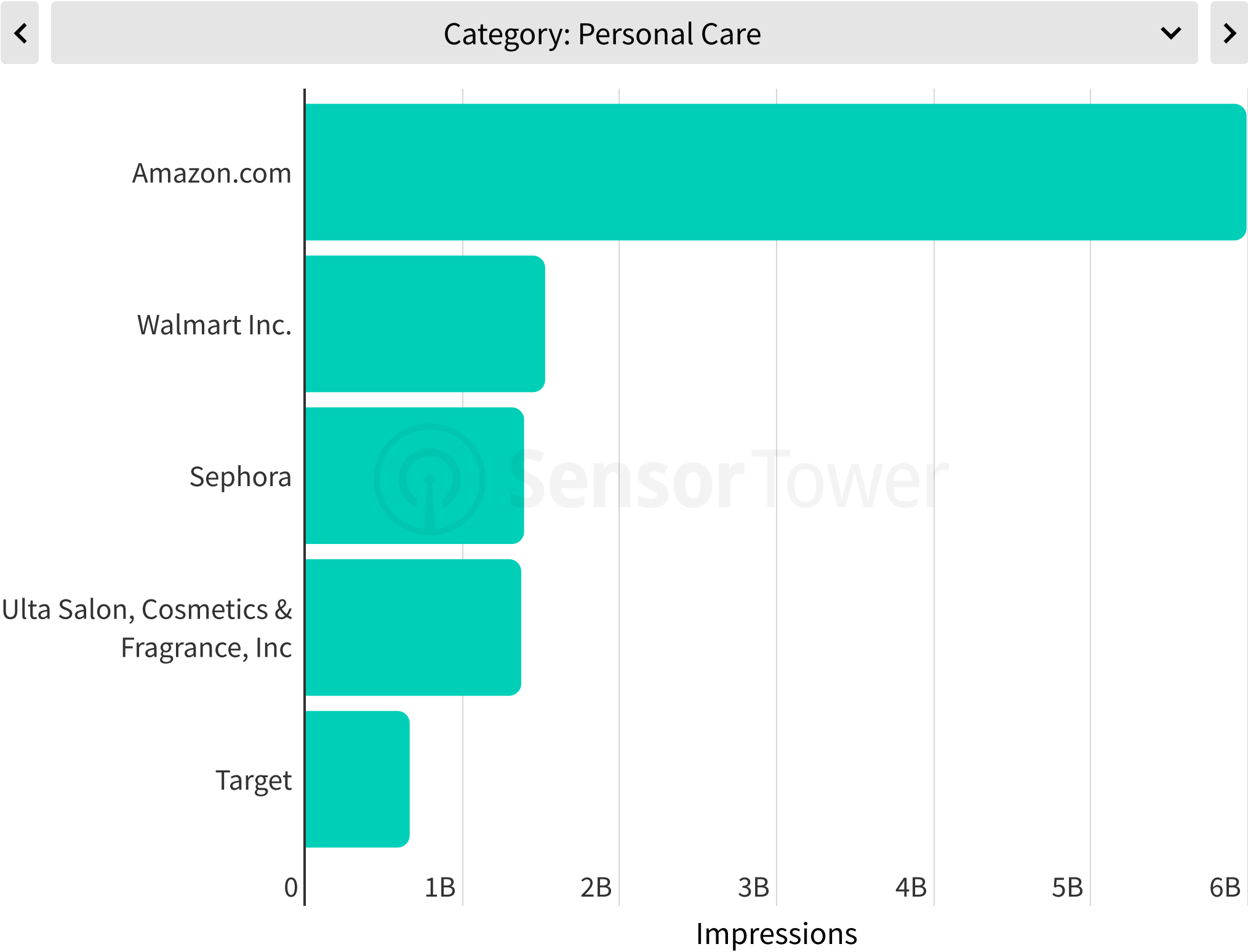
Definition:

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 or advertising for retailer's own products. See [Appendix \(page 43\)](#) for list of retailers included in each market.

Top Retail Media Retailers by Category in the United States

Q2 2025



Chewy was a Top Choice for Several Pet Supply Brands

In Q2 2025, many of the top retailer/advertiser combinations by US impressions included Amazon. However, a number of brands also chose to partner with other retailers, such as Mars and Nestle with Chewy, and No Boundaries and Microsoft with Walmart. These partnerships show that brands find significant value in advertising on specific retail platforms to get their products in front of the right consumers.



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





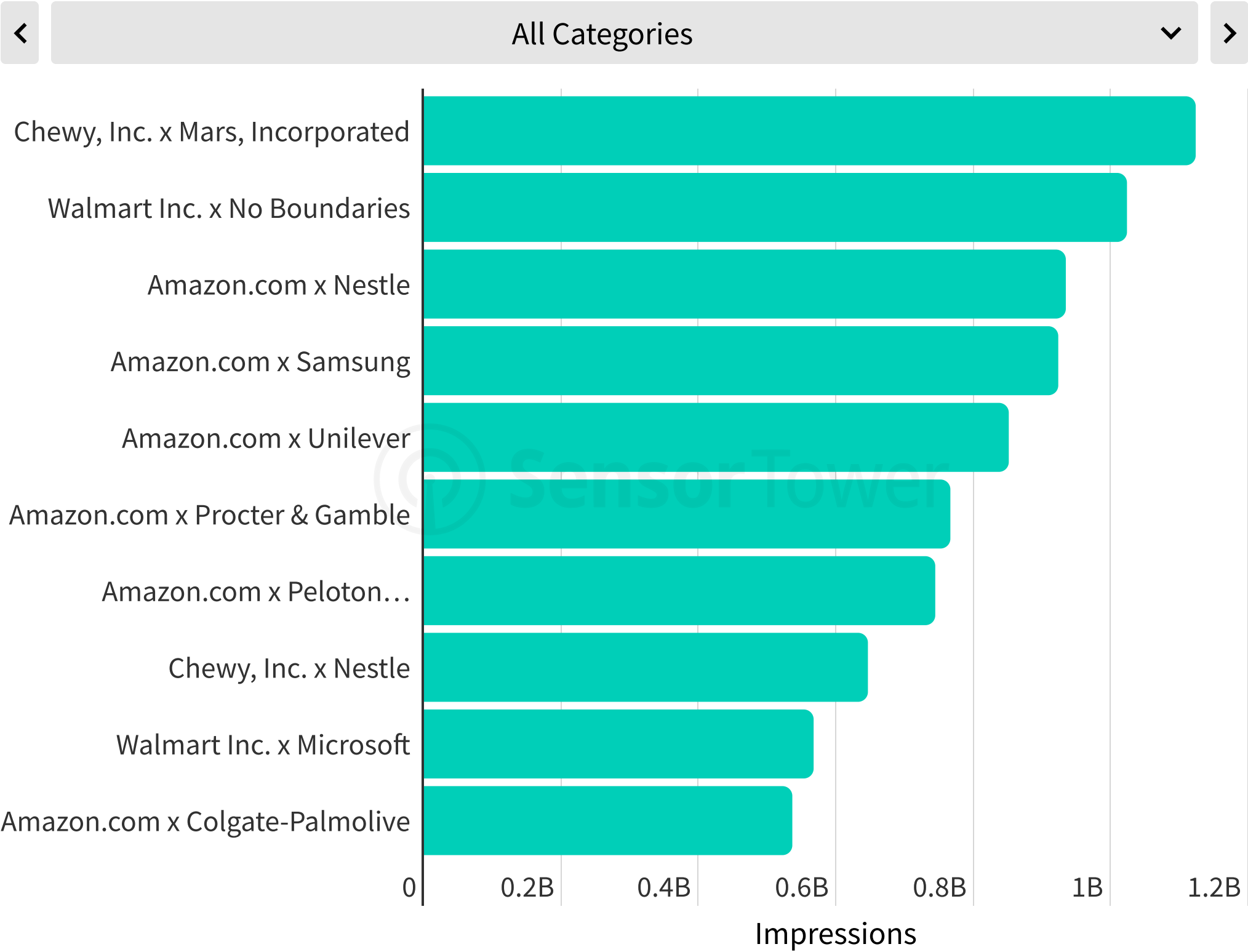
Retailer:
Chewy



Advertiser:
Purina

Source: Sensor Tower
Note: Includes a selection of top US retailers. Excludes cases when the advertisers are not currently tracked by Sensor Tower or advertising for retailer's own products. See [Appendix \(page 43\)](#) for list of retailers included in each market.

Top Co-Branded Retailer / Advertiser Combinations in the United States
Q2 2025



Dig Deeper into Co-Branded Advertising Partnerships and Opportunities

Nestlé diversifies its retail media approach across major platforms like Amazon, Walmart, Target, Chewy, and Kroger. While its partnerships are widespread, the products it promotes vary by retailer. Nespresso was Nestlé's top advertised product on Amazon, while a Purina brand product was most advertised on other retailers. This demonstrates that successful brands tailor their advertising to the specific audience and product mix of each retail partner.



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

Q2 2025

<

Retailer: Amazon.com

▼

>

Rank	Co-Branded Advertiser	Top Product	Example Creative
1	Nestle	Nespresso	Banner
2	Samsung	Samsung	Video
3	Unilever	Onnit AlphaBrain Nootropic Brain Health Supplement	Banner
4	Procter & Gamble	Always Discreet	Banner
5	Peloton Interactive, Inc.	Peloton Interactive, Inc.	Banner
6	Colgate-Palmolive	Colgate Optic White Toothbrush	Banner
7	Stila Styles, LLC	Stila Styles, LLC	Banner
8	Otter Products, LLC	OtterBox	Banner
9	Nutrafol (Nutraceutical Wellness, Inc.)	Nutrafol Women's Balance	Banner
10	Turtlebox	Turtlebox	Banner

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.

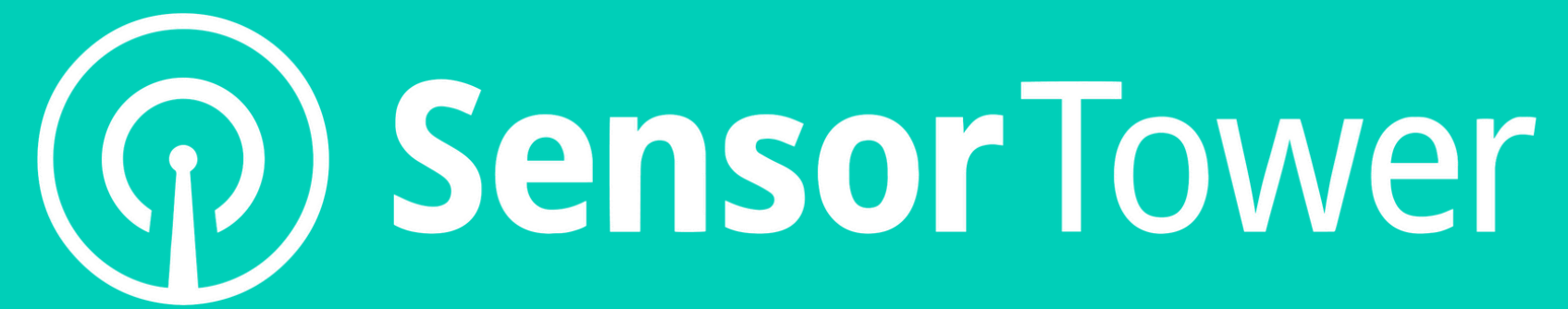
Included Ad Channels by Market

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.					



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!



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