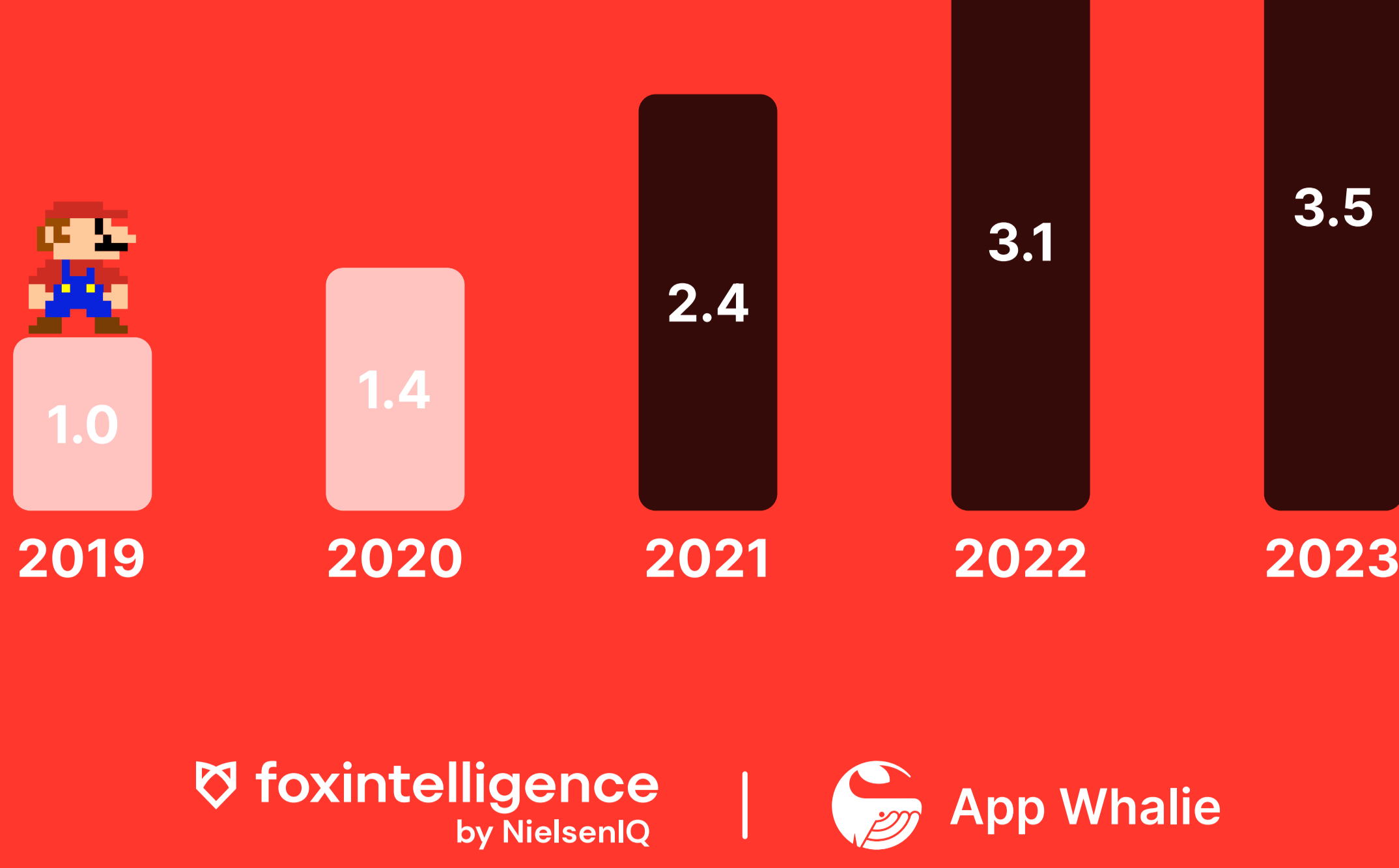


# State of Mobile Apps Market in 2024 based on In-App purchases

## In-app purchases mobile apps trends

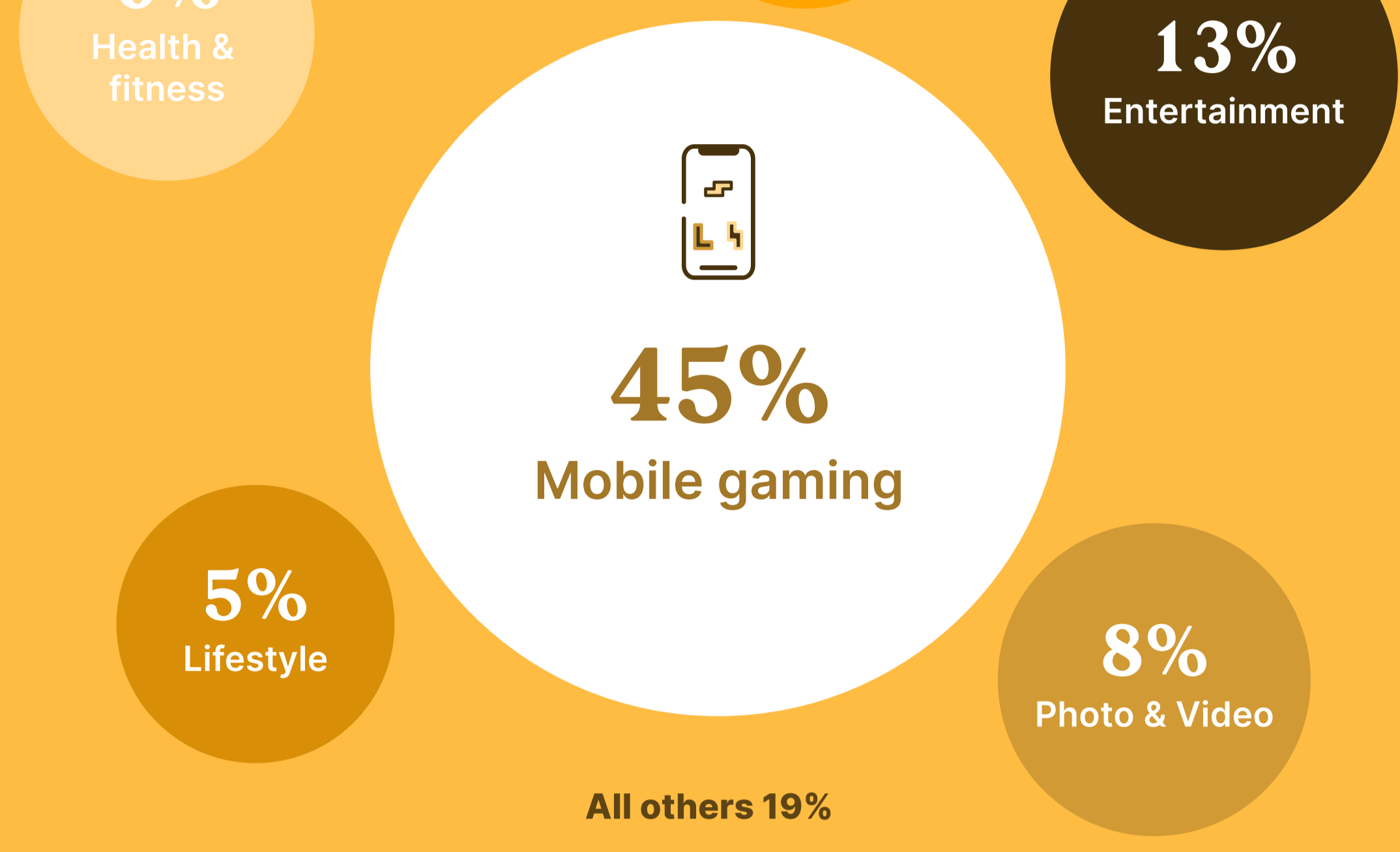
### Evolution of IAP revenue growth index by year



foxintelligence by NielsenIQ | App Whalie

Source : Consumer panel AppWhalie by NielsenIQ - US

### Mobile gaming is the leading IAP category, accounting for 45% of 2023 IAP revenue



foxintelligence by NielsenIQ | App Whalie

Source : Consumer panel AppWhalie by NielsenIQ - US - Full year 2023

### Top 10 IAP performing apps in 2023

- #1 Youtube
- #2 MONOPOLY GO!
- #3 Royal Match
- #4 Candy Crush Saga
- #5 Audible
- #6 Disney +
- #7 Stream HBO
- #8 TikTok
- #9 Paramount+
- #10 Bumble

foxintelligence by NielsenIQ | App Whalie

Source : Consumer panel AppWhalie by NielsenIQ - US - Full year 2023

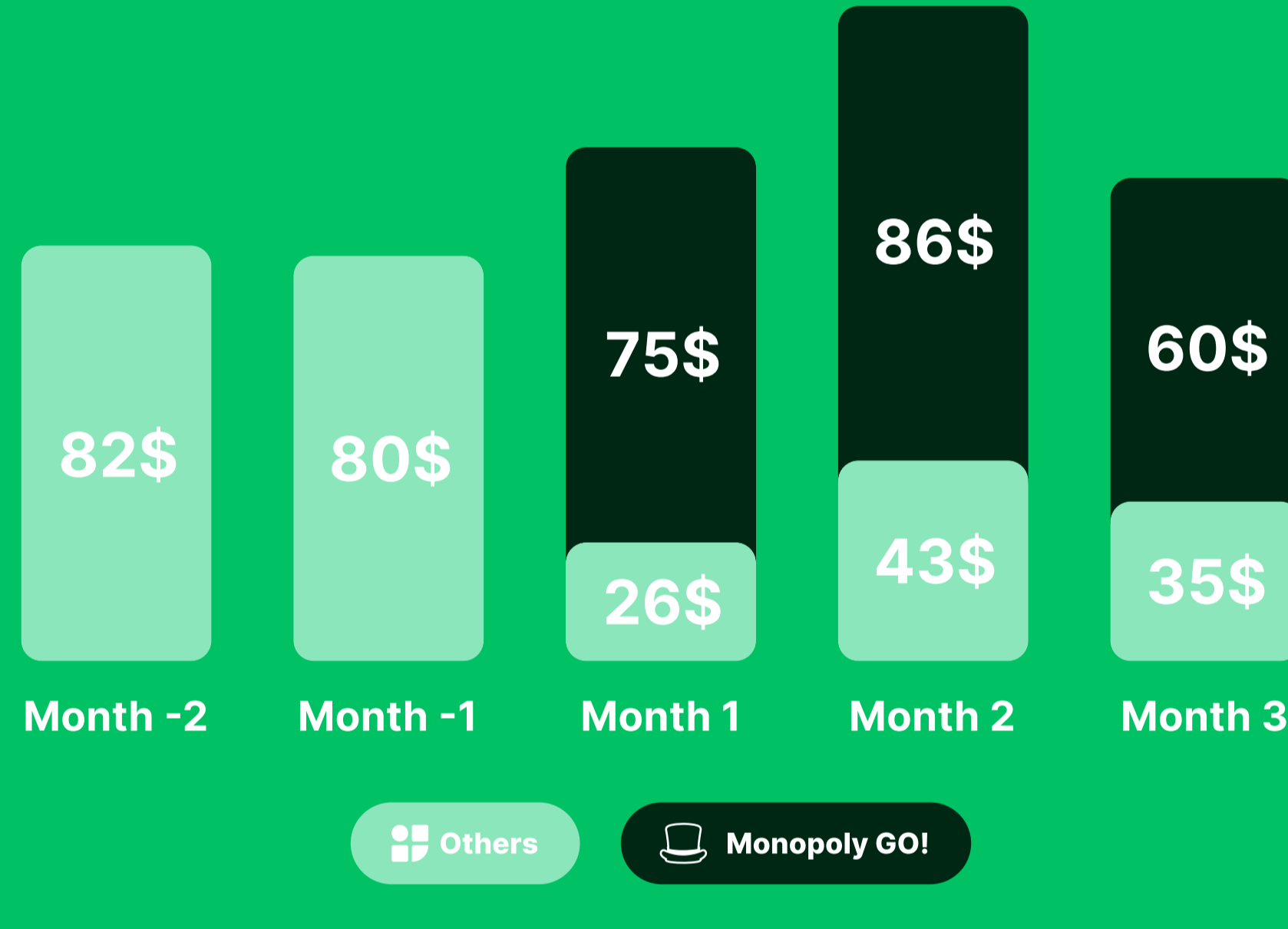
### Monopoly GO! was huge success among mobile gamers



### Provenance game mix: % of Monopoly Go buyers that had previously bought in another game since 2019

#1 Pokémon GO	14%	#6 Minecraft	7.3%
#2 Candy Crush Saga	13.2%	#7 Homescapes	7.1%
#3 Roblox	9.8%	#8 Township	6.8%
#4 Royal Match	9.7%	#9 Clash of Clans	6.3%
#5 Coin Master	9%	#10 Gardenscapes	6%

### Evolution of IAP monthly spend for Monopoly GO! buyers

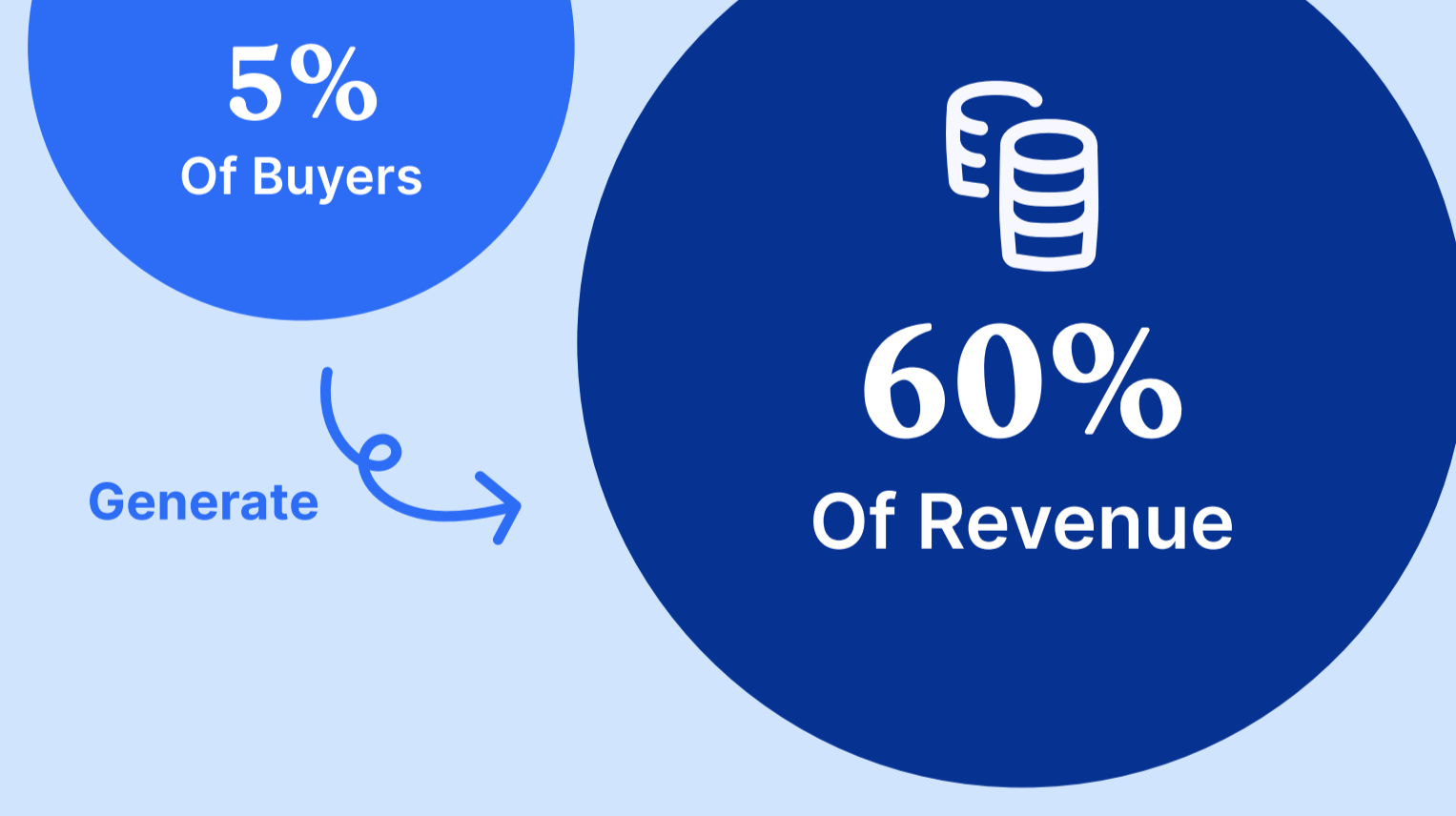


foxintelligence by NielsenIQ | App Whalie

Source : Consumer panel AppWhalie by NielsenIQ - US

## Whales optimization

### Meet the gaming whales: the revenue is driven by a little proportion of customers



### Consumption KPI between gaming whales and all gaming buyers

	Gaming Whales	All gaming buyers	Ratio
Frequency of purchase	19,5 IAP/month	4,3 IAP/month	X4,5
Monthly spend	\$92,5 /month	\$19,6 /month	X4,7
Average game IAP consumption duration	338 days	152 days	X2,2

foxintelligence by NielsenIQ | App Whalie

Source : Consumer panel AppWhalie by NielsenIQ - US - Full year 2023

## IAP monetization optimization

### IAP Rebuyer journey analysis, Clash royale April 2023 during the pass IAP transition

#1 purchase	#2 purchase	Average time between purchases
Pass royale - \$4.99	41% Diamond pass - \$11.99	25 days
	29% Gold pass - \$5.99	19 days
Gold pass - \$5.99	40% Pass upgrade - \$6.99	4 days
	23% Gold pass - \$5.99	41 days
	17% Diamond pass - \$11.99	48 days

foxintelligence by NielsenIQ | App Whalie

Source : Consumer panel AppWhalie by NielsenIQ - US - April 2023

## Understand how apps generate revenue

### A panel of 5M e-shoppers worldwide:

- Transactional emails collected passively, anonymized & processed in real time
- Outstanding & growing coverage with 16 000+ apps and 10 000+ apps developers
- AppWhalie empowers your app development and marketing strategies with comprehensive data analysis, enabling you to identify high-value users, optimize monetization strategies based on in-app purchases, and maximize revenue generation.

Free trial on [www.appwhalie.com](http://www.appwhalie.com)