

State of Subscription Apps 2025

RevenueCat's annual overview of in-app subscription performance benchmarks, based on the world's largest subscription app data set.

RevenueCat

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\$0.63+

AI apps print money – but only if they stand out – Most AI apps see revenue per install above \$0.63 after 60 days, matching only Health and Fitness (\$0.63), at double the overall median of \$0.31. But AI alone won't drive success, differentiation does.

35%+

Subscriptions aren't enough anymore – 35% of apps now mix subscriptions with consumables or lifetime purchases. Gaming (61.7%) and Social & Lifestyle (39.4%) are leading the charge.

30%

Churn hits hard and fast – Nearly 30% of annual subscriptions are canceled in the first month. If you don't win them back over, at the end of that first year, they're gone. Retention starts on day one.

36%

Low prices keep users locked in – Most apps with cheap annual plans keep up to 36.0% of users subscribed after a year. High-priced monthly plans? Just 6.7% stick around.

400x+

The gap between winners and the rest is growing – At \$8,888 the top 5% of newly launched apps make over 400x as much money after their first year, compared to the bottom 25%, who make no more than \$19. This gap has grown significantly since last year's 200x.

RevenueCat

Twelve months ago, I joked about how AI was going to change everything for subscription apps. It did, but in ways I didn't fully appreciate at the time.

AI-powered apps are outperforming a bunch of legacy categories already, and on top of that, AI-assisted development has made launching (and iterating) an app feel more like a weekend hobby project. Running a subscription business is still hard, but AI is letting us do more, faster and has created an incredible amount of disruption that now is a better time than ever to build and invest.

Of course, it wouldn't be a State of Subscription Apps report without us going completely overboard on data. Last year, I warned you it was "dense." So this time around, we doubled down—literally. Twice the page count, more charts, and more slicing and dicing: we broke down metrics by category, platform, region, price point, engagement strategy, and probably a few other segments you never knew you needed. The result is a monstrous trove of insights that should keep you busy until next year's version which will probably come in a 3 volume set.

Building a successful subscription app is easier said than done—even in the era of vibe-coded, one-shotted apps. My hope is that you'll find the data you need in these pages to handle your next big challenge, whether that's retention, pricing, or cracking into a new market. At RevenueCat, giving away information is one of our top 7 favorite activities, and we're excited to keep pushing the envelope on what we can learn—and share—about this thing called apps.



Jacob Eiting
Big Boss & Co-Founder

Overview of the Data Set

This report draws on subscription app performance data from a wide range of apps that use RevenueCat’s platform. Our goal is to provide a comprehensive snapshot of how apps are performing under different scenarios, across both the iOS and Android ecosystems.

To achieve this:

- **Scope of Apps Included:** We included apps that have active subscription revenue, meet a minimum threshold of installs or revenue (to ensure statistically meaningful findings), and have integrated RevenueCat for in-app subscription management
- **Time Frame:** The target time frame for metrics in this report is 2024. In some cases, we had to pull older data to run certain calculations (we can’t calculate third renewal rate for annual subscriptions bought in 2024, for example)
- **Size and Composition:** We analyzed over 75,000 apps across all categories (e.g., Health & Fitness, Productivity, Education), covering more than \$10 billion in revenue across more than a billion transactions. They vary in scale, from indie teams to mid-size organizations to large publishers. The set includes both apps that primarily generate revenue from in-app subscriptions and those that generate a portion of revenue from subscriptions alongside other revenue channels.

All data is anonymized and aggregated, ensuring that no single app’s performance metrics are individually identifiable. The findings are presented as aggregated performance benchmarks across segments, categories, and platforms

Anonymization and Data Privacy

To preserve the confidentiality of individual apps, we apply strict controls to ensure that if a segment has too few apps, results are either omitted from the report or combined with a larger segment to avoid the possibility of inferring any single app’s data. Throughout this report, numbers represent aggregated totals, averages, medians, quartiles, or other summary statistics. No app-specific or developer-specific details are ever disclosed

Statistical Definitions (Bottom Quartile, Median, Upper Quartile, P90)

We use several measures of central tendency and spread to illustrate app performance:

- **Bottom Quartile (Q1):** The value below which 25% of the dataset falls. An app that falls into the bottom quartile is among the lower 25% of performers on that metric
- **Median (Q2):** The middle value, with half of the data above and half below. When comparing your own metrics to the median, you can see if you are performing above or below the midpoint of the industry
- **Upper Quartile (Q3):** The value above which 25% of the dataset falls. An app in the upper quartile is among the top 25% of performers for that metric
- **P90:** The 90th percentile. This indicates the point at or above which 10% of the dataset lies. An app at P90 is outperforming 90% of apps in that particular metric (aka, “crushing it”)

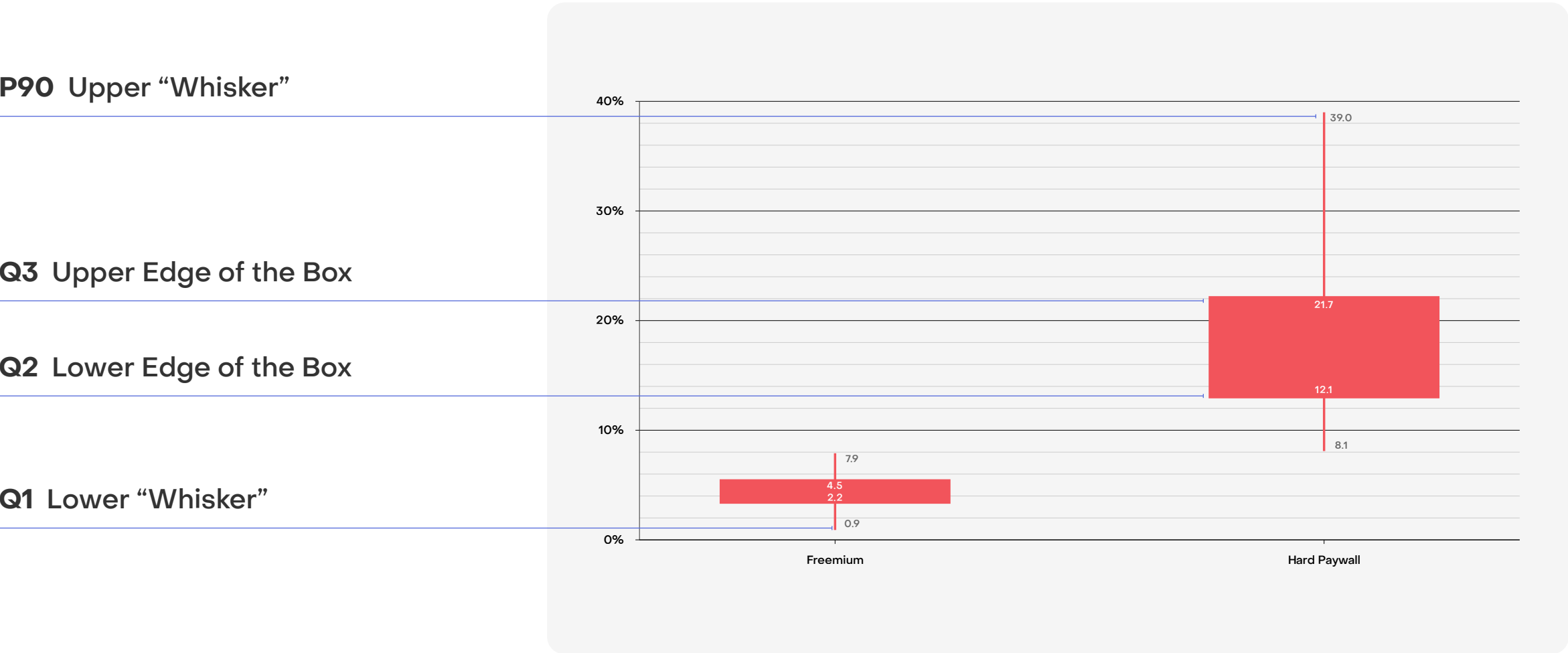
Reading Our Candlestick Charts

We often use candlestick (box-and-whisker-style) charts to visualize the bottom quartile, median, upper quartile, and P90 for a given metric (e.g., Revenue per Install, Renewal Rate, etc.). Here’s how to interpret them:

- 1. **Lower “Whisker”**: Represents the Bottom Quartile (Q1). Apps below this line make up the lowest 25% of performers
- 2. **Lower Edge of the Box**: Marks the Median (Q2)
- 3. **Upper Edge of the Box**: Marks the Upper Quartile (Q3)
- 4. **Upper “Whisker”**: Marks P90 (the 90th percentile)
- 5. **Outliers (if shown)**: Data points that are significantly outside the range of typical values are occasionally represented with individual markers beyond the whiskers

These charts help identify the spread and clustering of app performance. The “box” shows the bulk of the distribution (from the median to the upper quartile), and the whiskers show the extremes (bottom quartile and P90)

Example



Data Not Based on RevenueCat

While the majority of the metrics in this report derive from aggregated app subscription data (via RevenueCat), certain sections rely on external data:

- **Acquisition**: The acquisition section references data provided by AppsFlyer to understand the cost of user acquisition and user funnel metrics
- **Web Billing for Subscription Apps**: If an app processes subscription payments through web-based portals, that revenue is not captured by our in-app subscription data. Instead, Paddle has provided us with data from their userbase, filtered down to subscription apps with a web billing flow. Note that the definitions of churn, LTV, and growth used in this section also differ from the definitions used elsewhere

Measures We Include

Below are some of the included metrics in this report that benefit from some additional context:

- **Realized LTV (Lifetime Value) per payer**: The net value of an average paying user over a specific period of time, including initial subscriptions, reactivations, expansion, and one-time purchases
- **Revenue per Install (RPI)**: Total revenue earned divided by total installs. This metric highlights how well an app monetizes each new user
- **Active renewal rate**: The share of renewals that are done by subscribers that were active in the second half of the previous subscription period (in case of a monthly subscription, this asks if the user was seen in the app in the second half of the month previous to the renewal)
- **Reactivation rate**: The share of churned subscribers that become active in the 12 months following a churn event

Each metric is calculated consistently across all apps to allow for apples-to-apples comparisons.

Segments We Cover

To provide nuanced insights, we break down certain metrics by segments, including (but not limited to):

- **Access Method:** How users primarily access the app (freemium, via a hard paywall)
- **App Development Framework:** The primary technology stack used for app development (e.g., native iOS/Android, Flutter, React Native, Other)
- **Pricepoint:** How an app’s average pricepoint compares to the rest of the measured apps (below average, average, above average)

These segments can offer a closer look at how different development choices and distribution methods might impact subscription metrics

Category Bucketing (App Store & Google Play)

The App Store (iOS) and Google Play (Android) each have numerous categories. For clearer analysis, we’ve aggregated or “bucketed” closely related categories under common labels:

- **Utilities:** Includes Weather, Reference, Utilities, Finance, Tools, and more
- **Health & Fitness:** Includes Health and Fitness, and Medical categories
- **Media & Entertainment:** Includes Entertainment, Music, News, Magazines and Newspapers, Sports, and more
- **Education:** Includes Education, and Educational
- **Productivity:** Includes Graphics and Design, Art and Design,

and Developer tools

- **Social & Lifestyle:** Includes Lifestyle, Social Networking, Social, and Dating
- **Gaming:** Includes Games, Puzzle, Casual, Word, Simulation, Board, and more
- **Photo & Video:** Includes Photo and Video, Photography, and Video Players and Editors
- **Business:** Includes Business
- **Travel:** Includes Travel, and Travel and Local
- **Shopping:** Includes Shopping

We have done this to simplify comparisons—especially when certain official categories have too few apps to provide stable, anonymized benchmarks

Jacob & David Read the Whole Thing—Here's What They Said

RevenueCat

State of
Subscription
Apps 2025

Jacob Eiting
David Barnard

\$ub Club

1. AI Monetization: It's Not Just About Conversion

In this episode, Jacob and David unpack why AI-powered apps are generating more revenue per subscriber, despite converting at similar rates to non-AI apps. The key? Users are willing to pay more for meaningful AI-driven experiences—but simply adding AI isn't enough. “The hard part is building something unique and sticky,” Jacob explains. “It's never been about just shipping the app.”

2. Hybrid Monetization is Becoming the New Standard

More apps are blending subscriptions, consumables, and lifetime purchases to give users flexibility—and to unlock more revenue. This is especially important for AI apps, where usage-based models like credits are helping apps manage costs while letting high-intent users spend more as they scale usage.

3. Don't Bury Your Paywall—Your Users Won't Wait

80% of trial starts happen on day one, meaning your window to convert users is shorter than ever. Apps that surface their paywall during onboarding consistently outperform those that wait. To maximize conversions, your trial offer should be one of the first things new users encounter.



\$ub Club

Listen to Jacob and David on a special, full-length Sub Club episode

Conversion

01

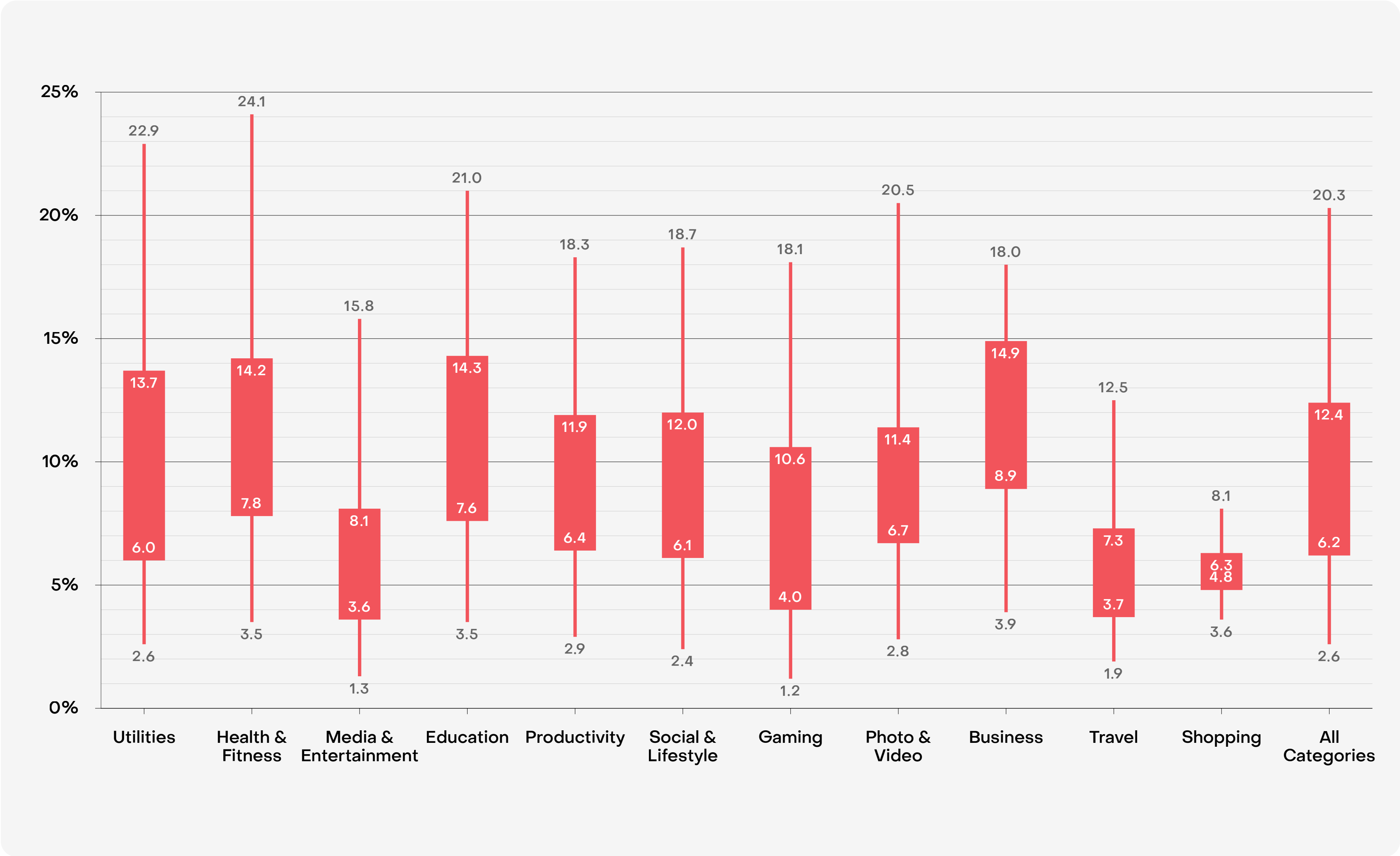
How well do apps convert downloads and trials into subscribers?

What we'll be benchmarking:

- Trial start rate
- Trial conversion rate
- Download-to-paid conversion rate

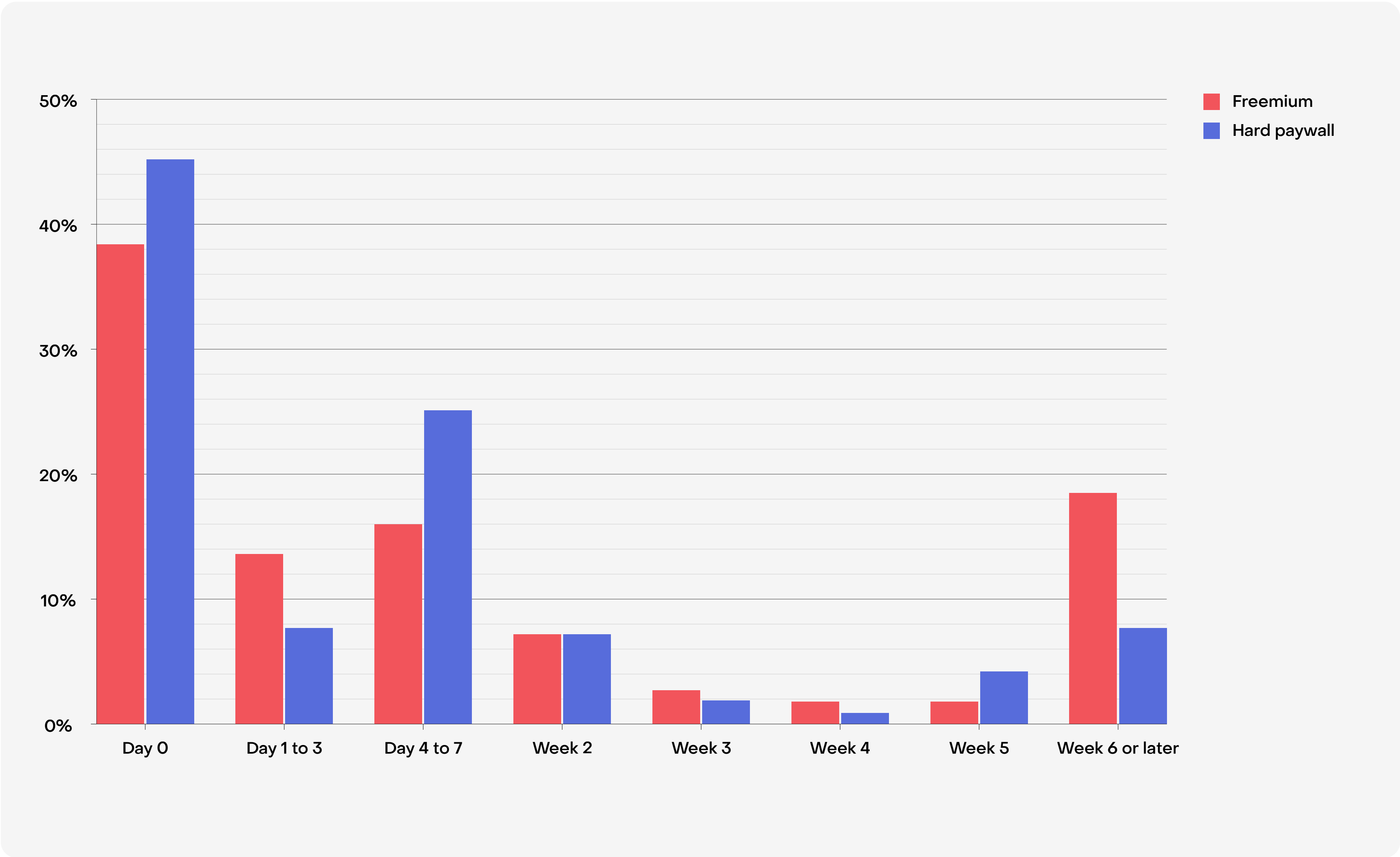
Download to Trial, By Category

⚠ This chart shows the bottom quartile, median, upper quartile, and top 10% of performance, in order, from the bottom up



- High-performing apps significantly outperform the median, proving the impact of strong onboarding and paywalls. In most categories, the top 10% convert downloads to trials at double or triple the median rate. This highlights how trial placement, personalized onboarding, and clear value messaging can boost conversions
- The lowest quartile conversion rates highlight a challenge for many developers. Even in high-performing categories like Health & Fitness, some apps struggle to turn downloads into trials. Testing trial length, paywall timing, and messaging is key to improving conversion rates, especially in impulse-driven categories like Gaming
- Subscription apps with strong habitual use cases tend to convert better. Business, Health & Fitness, and Productivity apps perform well, as users seek long-term solutions. In contrast, impulse-driven categories like Gaming and Media & Entertainment see lower conversion rates, making trial optimization even more critical

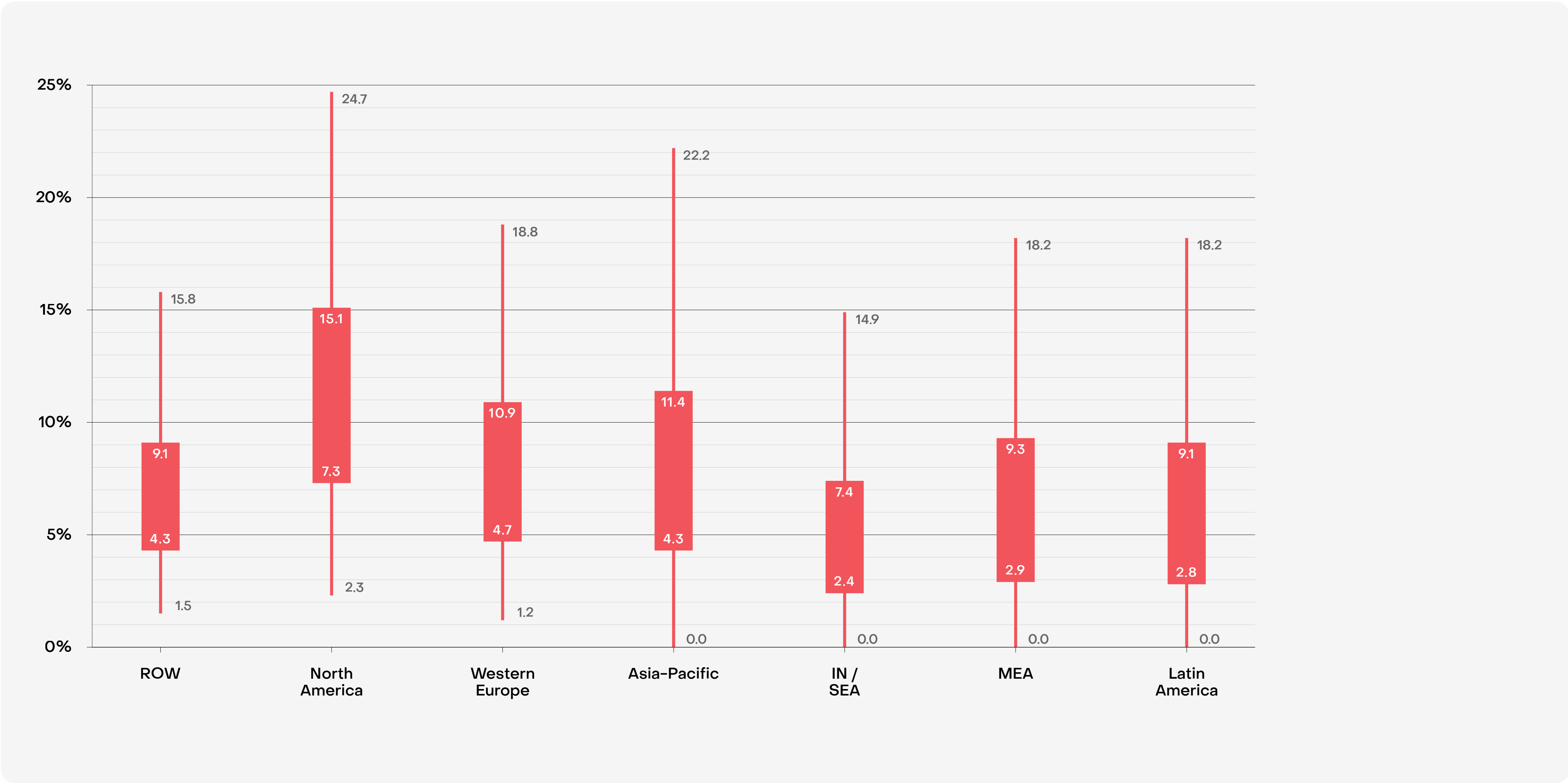
Download to Trial, By Access



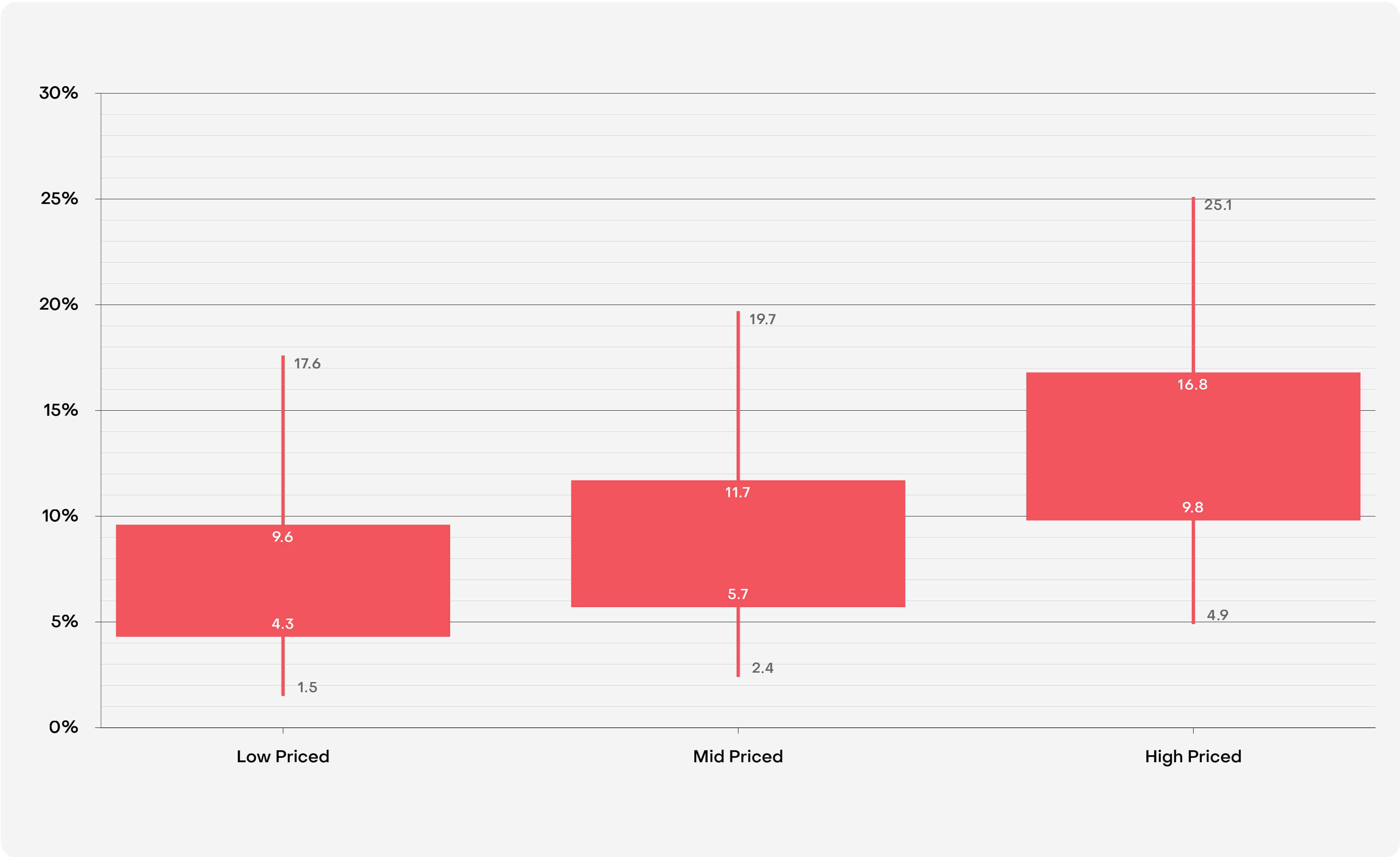
- The majority of hard paywall users convert on Day 0, showing that when forced to decide upfront, users either commit quickly or drop off—reinforcing the need for compelling messaging and strong perceived value
- A larger share of freemium users convert weeks after download, suggesting that gradual engagement strategies, well-timed upsells, and feature gating play a key role in long-term monetization
- While hard paywall apps see faster conversions on average, the best freemium apps still achieve strong Day 0 conversion rates, proving that execution matters more than monetization model alone

Download to Trial, By Geography

Trial conversion rates vary by region, with North America and Asia-Pacific leading. Emerging markets like MEA and Latin America show wider variability, highlighting differing user behaviors and purchasing power.



Download to Trial, By Pricepoint



- Higher prices correlate with higher trial conversion rates. Contrary to expectations, apps with higher subscription prices see stronger download-to-trial conversion rates at the median. A median conversion rate of 9.8% for high-priced apps, compared to 4.3% for low-priced apps, suggests that users downloading expensive apps may already be more intent-driven
- Trial conversion is a quality-over-quantity game. While lower-priced apps attract more downloads, they convert a smaller share into trials. Higher-priced apps may naturally filter for more motivated users, meaning those who download are more likely to engage with the paywall and start a trial
- The bottom quartile still struggles, regardless of price. While median and top-quartile performers see higher conversion at higher prices, the bottom quartile remains low across all price points. This suggests that simply increasing price doesn't guarantee conversions—execution matters more than pricing alone

Optimizing onboarding flows to maximize trial start rates is a huge source of leverage for many subscription apps

According to this year's report, 82% of trial starts occur the same day a user installs an app, which is even higher than last year! With consumer attention spans getting shorter and shorter, the window of opportunity for your business to get new users into a trial has never been narrower.

The report also highlights just how much more efficient the top apps are at getting users into trials – p90 apps boast a 20.3% trial start rate, which is >3x better than the median app at 6.2%. Meanwhile, p90 apps are only ~2x more efficient at converting trials into paying subscribers.

The takeaway is that there is massive leverage in finding ways to maximize trial start rates. Specific levers for accomplishing this include:

- Streamlining registration through SSO options like Apple, Google, and Facebook
- Personalizing the new user experience using a brief onboarding quiz
- Maximizing paywall view rate and optimizing paywall design and copy
- Experimenting with different trial formats and lengths

One recent trend I've seen is more apps experimenting with reverse trials, where new users get full access to the premium product without needing to provide payment info upfront. While this is a bit of a gamble, it has paid off for companies like Ladder and Strava that have strong enough product / market fit to be confident users will convert at the end of their trials.



Phil Carter
Founder and CEO at Elemental Growth

Benchmark Your App's Performance

Get a customized scorecard to see how you compare against this year's subscription app benchmarks.

Enter your app's data

Compare your app's performance to industry benchmarks and uncover growth opportunities.

Health & Fitness

<u>Trial start, %</u> ⓘ	<u>Trial to paid, %</u> ⓘ	<u>Download to paid, %</u> ⓘ
5.4	39.9	2.1
<u>1st Renewal rate (mo), %</u>	<u>1st Renewal rate (yr), %</u>	<u>Active renewal rate, %</u>
61.0	23.1	75.5
<u>12m reactivation rate, %</u>	<u>Day 14 revenue / install, \$</u>	<u>1 mo realized LTV / payer, \$</u>
13.5	0.4	10.1

Calculate subscription health

Ready to find out exactly how your app compares to the broader industry? Plug your key metrics—like conversion rate, 6-month retention, and average revenue—into our new **Self-Evaluation Calculator**, and we'll generate a personalized **App Health Score**. You'll see if you're in the top percentile or if there's room to grow, complete with **radar charts** and **side-by-side benchmarks** to guide your next steps.

Key measures:

- Trial start rate
- Trial to paid conversion
- Download to paid conversion
- Day 14 Revenue per Install
- Month 1 realized LTV per payer
- 1st renewal rate (monthly)
- 1st renewal rate (yearly)
- 12m retention rate
- 6m retention rate

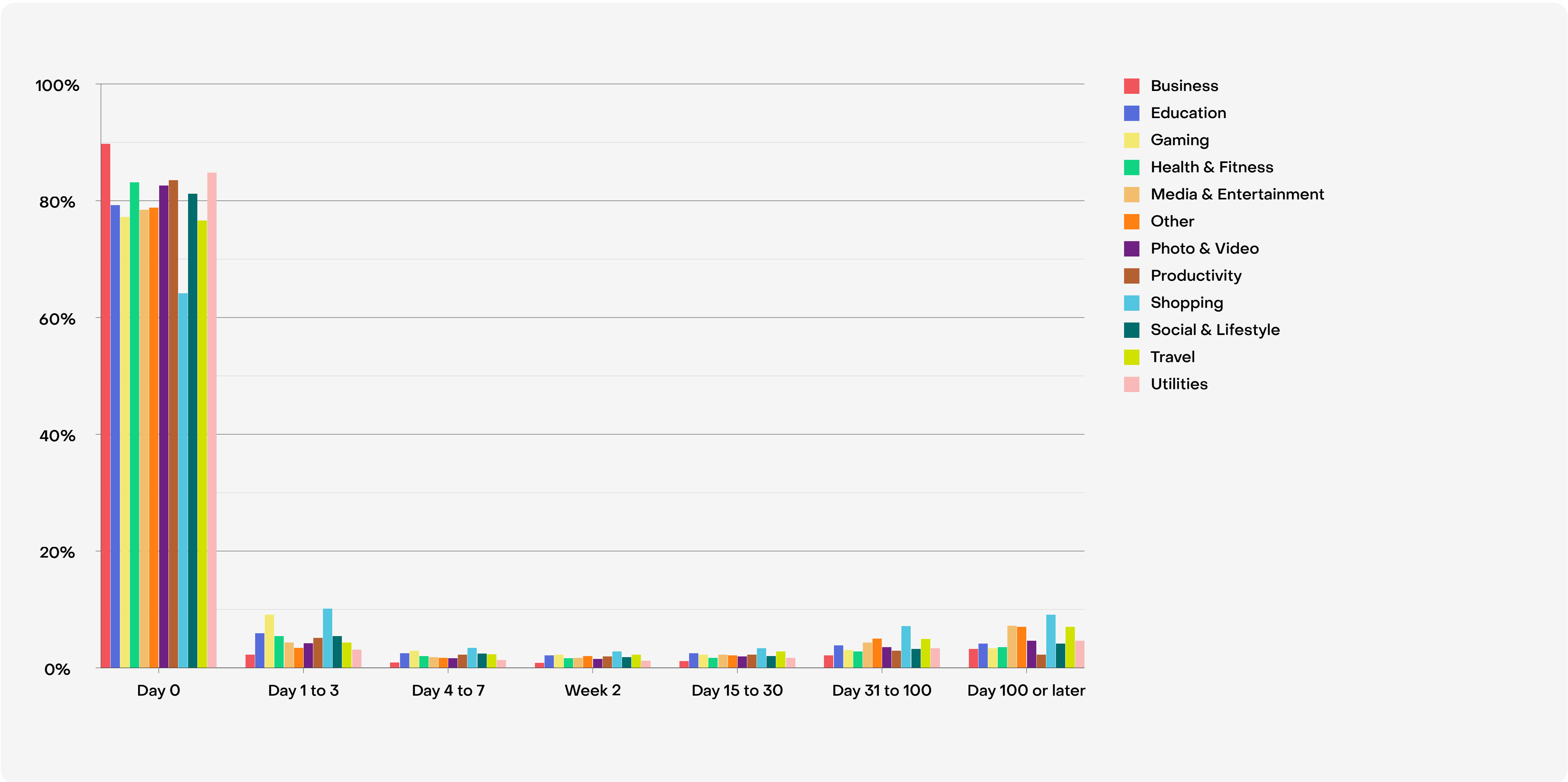
Ready for your personalized subscription report card?

Launch the Calculator

Inputs are confidential and are used locally to generate your results. Inputs aren't stored. Results are for benchmarking purposes only. Metrics and benchmarks are derived from aggregated, anonymized data in the 2025 State of Subscription Apps report.

Time to Trial, By Category

Across all categories, the vast majority of users start a trial immediately upon download, with conversion rates exceeding 80% on Day 0. This suggests that paywall placement and first impressions are critical to driving trial adoption.



Most trials will happen on day 0, after that you see diminishing returns - but that doesn't mean you shouldn't optimize

It's crucial to get users to trial as soon as possible, especially when the majority of value is felt with features that are gated or locked behind your subscription. Some key questions to ask yourself are: how early do people see a paywall? Do they have enough context beforehand? Are our paywalls contextual to their location in the product? How many paywalls do people see in their first session?

What you'll find is that trial opt in is directly correlated to how many times a user sees a paywall. However, what's key is the quality not just the quantity. Quality means: clear value proposition, strong pricing positioning and good user experience (UX).

The lowest hanging fruit with trial opt in is typically UX – i.e. where is the paywall – followed by UI: the tactics used on the paywall to position premium as the right next step for the user.



Rosie Hoggmascall

Product Growth Consultant
& Author of GrowthDives.com

How to optimize trial-to-paid conversions



Rachel Chukura
The Weather Company



1 Target high-value users with personalized experiences

Identify your most valuable cohorts through deep segmentation and user research. Tailor paywalls and premium features to resonate with each segment's needs, maximizing conversion rates without alienating casual users.

2 Leverage contextual triggers and data-driven targeting

Use contextual signals (like weather data) and AI propensity models to reach users at the right moment. This makes paywall prompts more relevant and effective, driving higher conversions while maintaining a positive user experience.

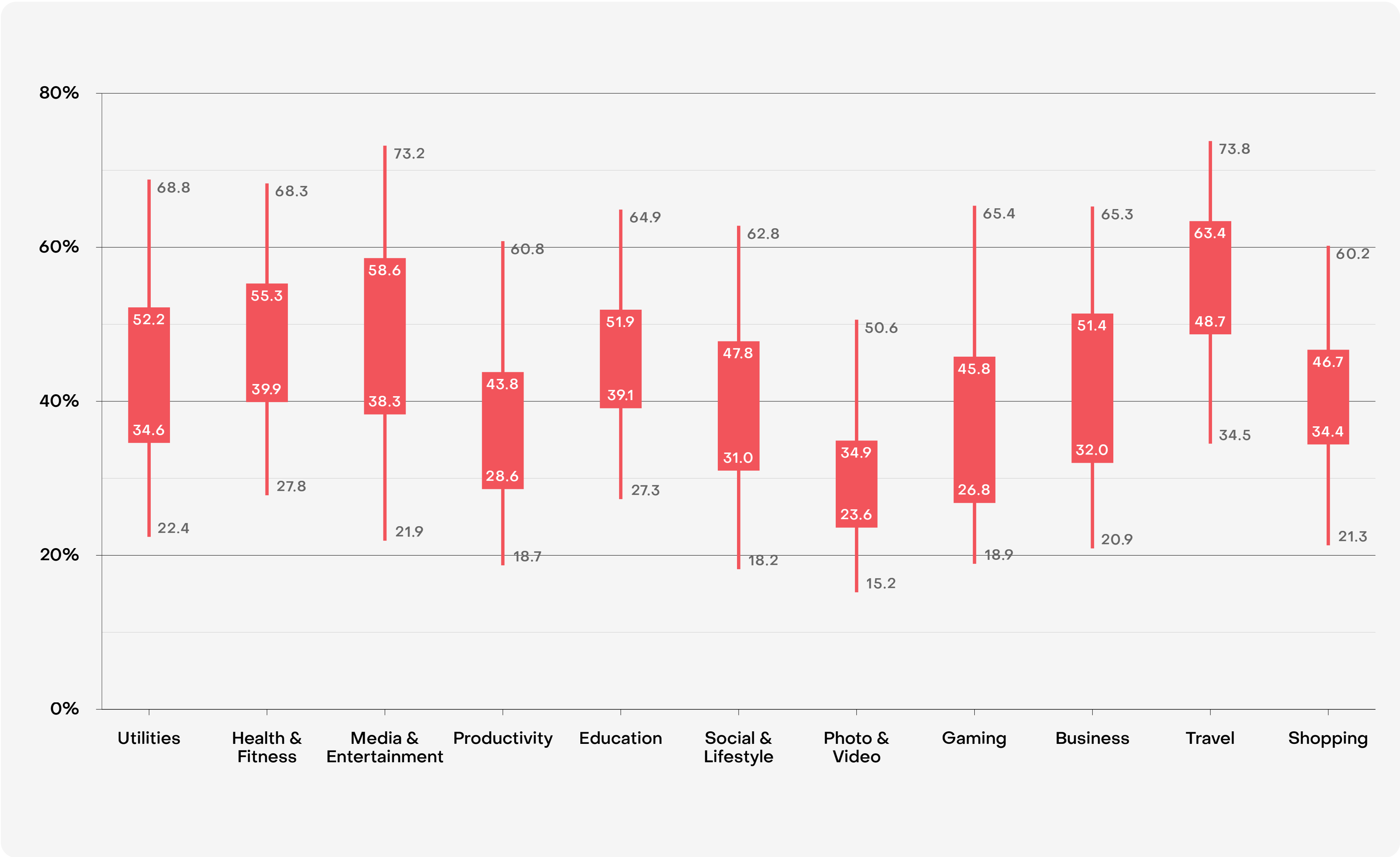
3 Test, learn, and iterate continuously

Adopt a rigorous approach to A/B testing with clear hypotheses and well-defined KPIs. Be patient and run experiments long enough to account for external variables. Regularly refine AI models and adapt strategies based on evolving user behaviors and market conditions.



Listen to Rachel's Minisode
(~15 min) on the Sub Club Podcast

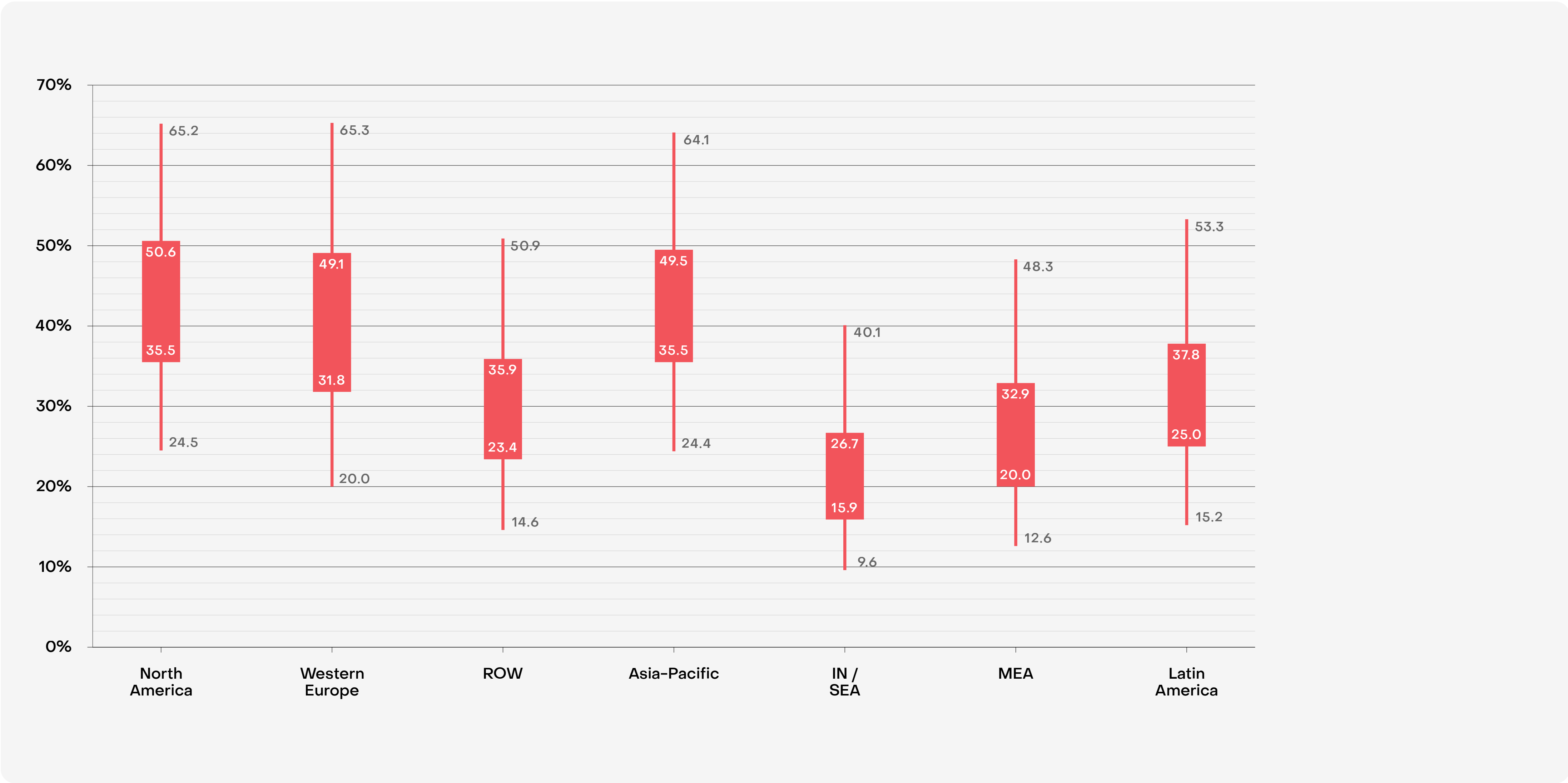
Trial to Paid, By Category



- Travel apps have the highest median trial-to-paid conversion rate at 48.7%, closely followed by Media & Entertainment at 43.8%. This suggests that users in these categories find immediate value, likely due to strong content offerings or time-sensitive utility
- Some categories, like Photo & Video and Shopping, show wide gaps between top and bottom performers, indicating that execution matters more than the category itself. The best apps in these spaces convert at nearly three times the rate of those in the bottom quartile
- While Health & Fitness apps have a median of 39.9%, the top 10% convert at 68.3%—one of the highest. This suggests that habit-forming features, community engagement, or premium content can drive stronger conversion outcomes in this category

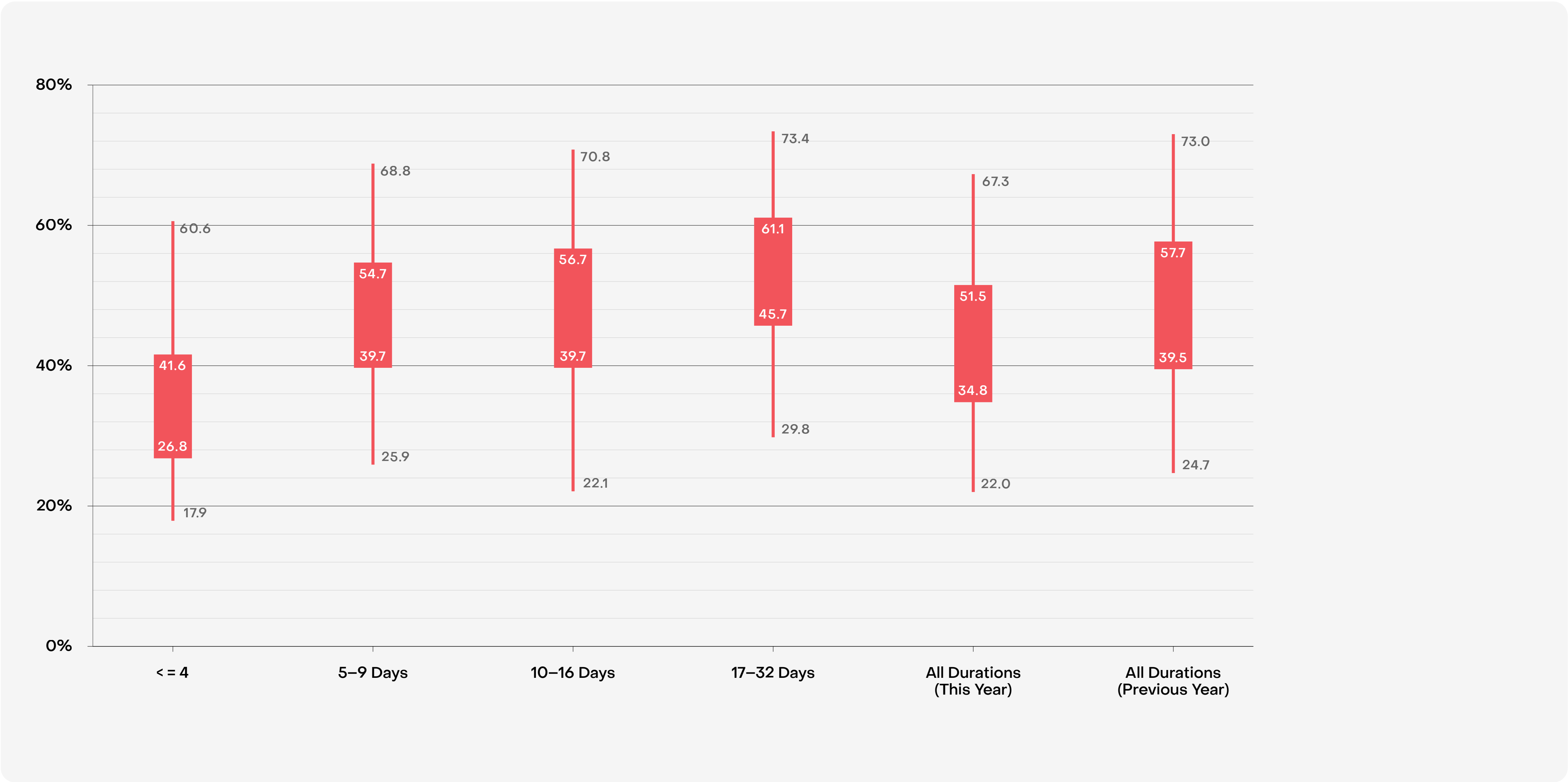
Trial to Paid, By Geography

While Latin America has a median of 25.0%, the top performers reach 53.3%, showing that high-converting apps exist in every market—success may depend more on localized pricing and marketing strategies.



Trial to Paid, By Trial Duration

Longer trials see better conversion rates. Trials lasting 17–32 days have the highest median conversion at 45.7%, suggesting that more time to experience value leads to stronger purchase intent.



Trials are your friend so long as they are visible, clear, and appealing to your users

The job of a trial is to allow the user to experience the paid product for just long enough to see the value – and no longer. How long it will take to see this value depends on:

- Who your customer is
- How often they experience the problem you solve
- How much they trust your product and company

If you're building a database solution for enterprise customers, they might need 180 days to get up to speed and see the value. However, if you're building a running companion app for serious athletes, they might be able to see the value in 72 hours. It all depends on the context of the user. Getting this right helps trial conversion materially.

As you can clearly see in RevCat's data, the vast majority of users who will start a trial of an app will do so on the same day that they download your application.

To get them to start a trial quickly, they need to want the product and think the trial is appealing.

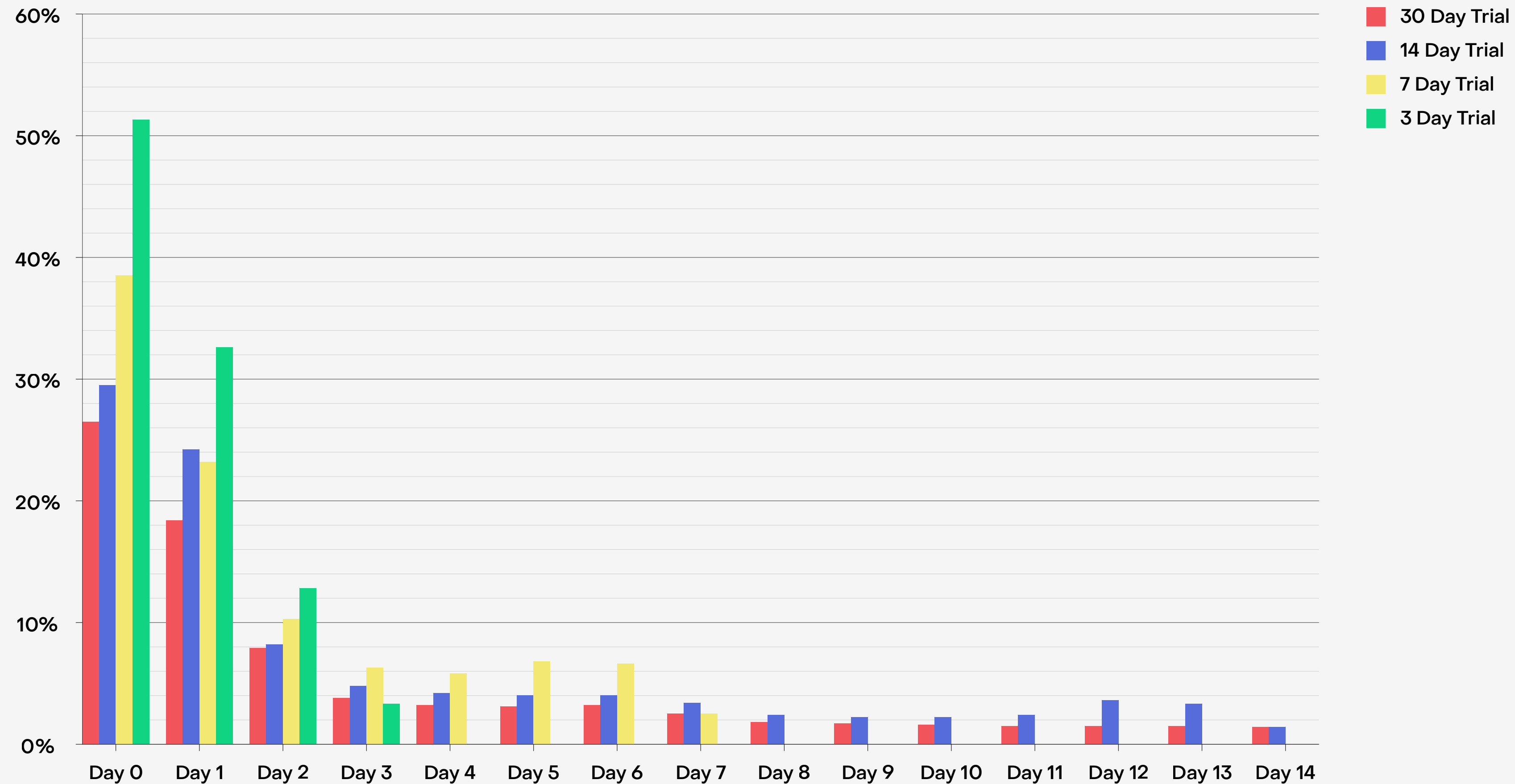
To get them to convert in the trial, however, they need to understand and want the product. This comes down to getting the user set up quickly so they experience the value.



Dan Layfield

Founder of Subscription Index
(ex Codecademy and Uber)

Percentage of Trial Cancellations by Day, By Trial Duration



- Shorter trials see the highest early cancellation rates. 3-day and 7-day trials have the highest Day 0 and Day 1 cancellations, suggesting that users may feel rushed to decide or may cancel preemptively to avoid being charged before exploring the app
- Longer trials distribute cancellations over time. 30-day trials see steadier cancellations, with drops occurring throughout the trial period. This suggests users take more time to evaluate, but a longer trial alone isn't enough to prevent churn—engagement remains key
- A notable cancellation spike occurs toward the end of each trial period, as users set reminders to cancel before getting charged. Retention efforts should focus on this window with targeted messaging or in-app incentives

Note Days 15–30 all recorded between 0% and 1.7% and are not visualized in the graph.

Focus on quality trials, not just quantity

Most trial cancellations happen very early in the user journey. There's a cohort of users who cancel right away – within minutes of starting their trial.

At Blinkist, we tried targeting these users with specific offers but found that success rates were very low. Our conclusion: they just join for a free sample.

Opportunity in early cancellations

Early cancellations can be a valuable indicator of the overall quality of a cohort, offering insights for user acquisition efforts. With so many users cancelling right away, it's been a popular tactic to optimize ad campaigns on Meta and other channels for a “**qualified trial**” event – one that fires only a few hours into the journey for users still active on their trial.

While this tactic was hard to pull off under SKAN, given that events could only be fired with users active in the app, platform probabilistic measurement frameworks like Meta's AEM have made this option viable and popular again.

Focus on quality, not quantity

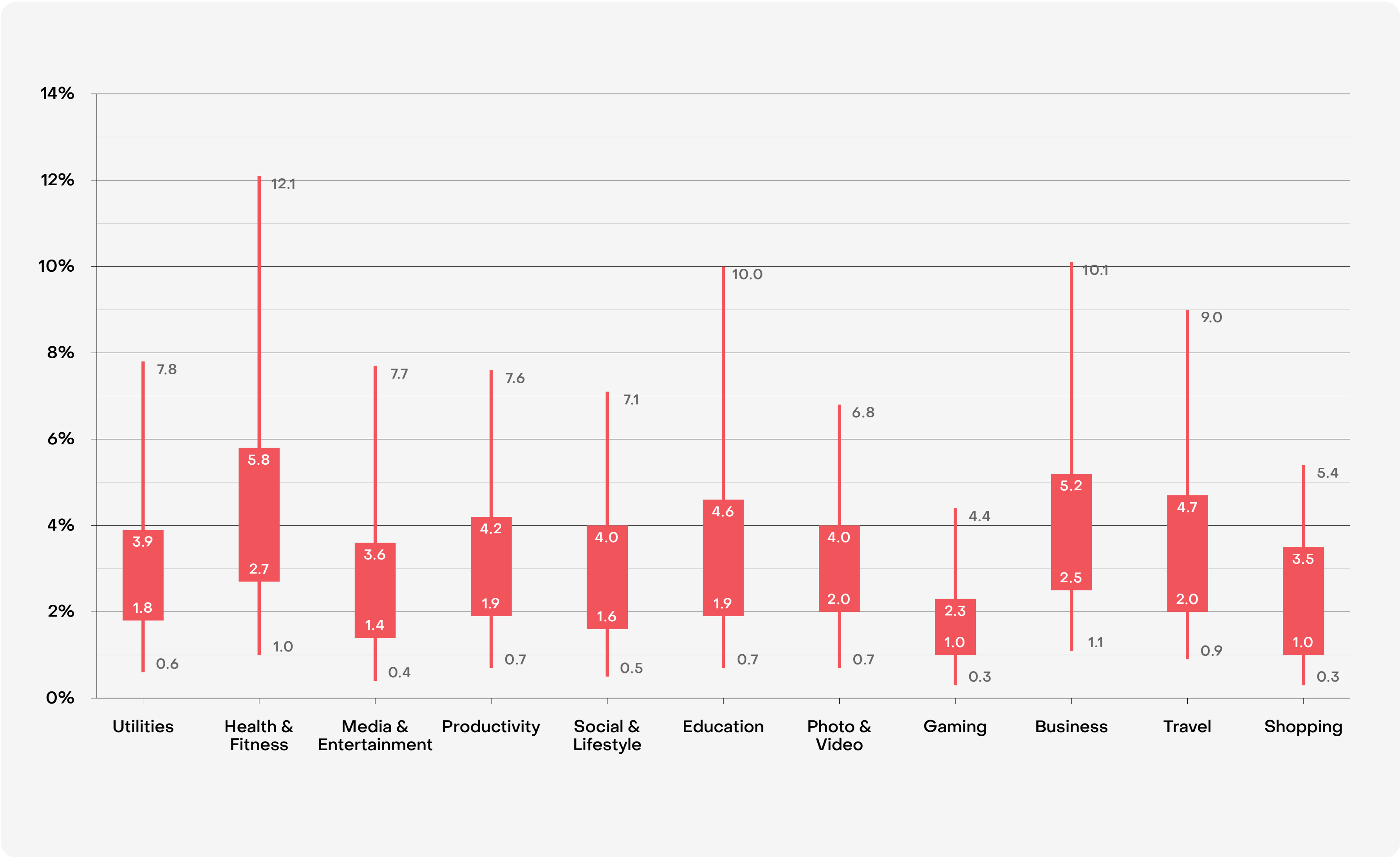
As trial-to-paid conversion varies massively by demographic, creative, and other factors, optimizing for qualified trials can help ad platform algorithms separate the wheat from the chaff. Quality trials > quantity trials.



Marcus Burke

Meta Ads & App Growth Consultant

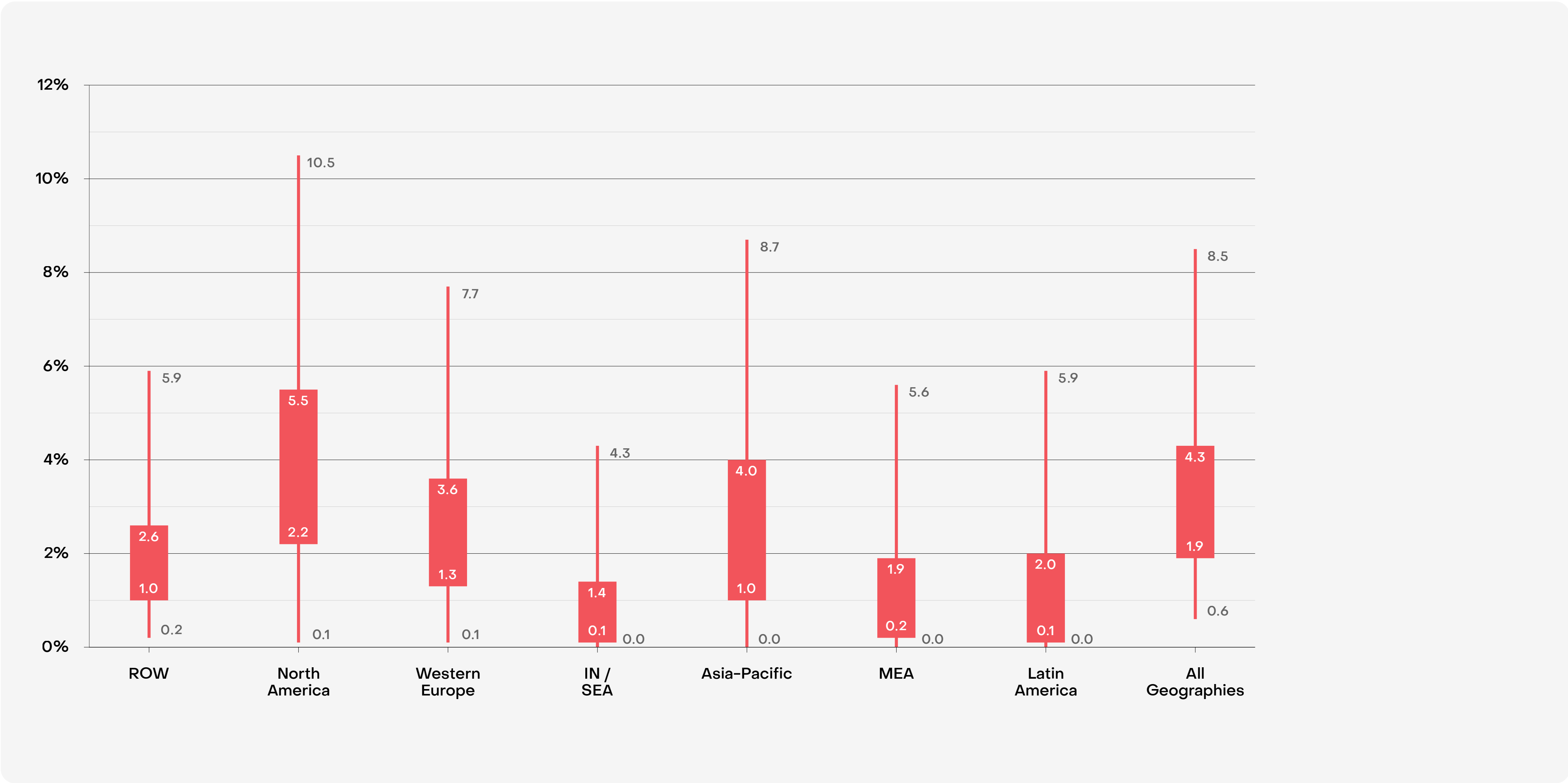
Day 35 Download to Paid, By Category



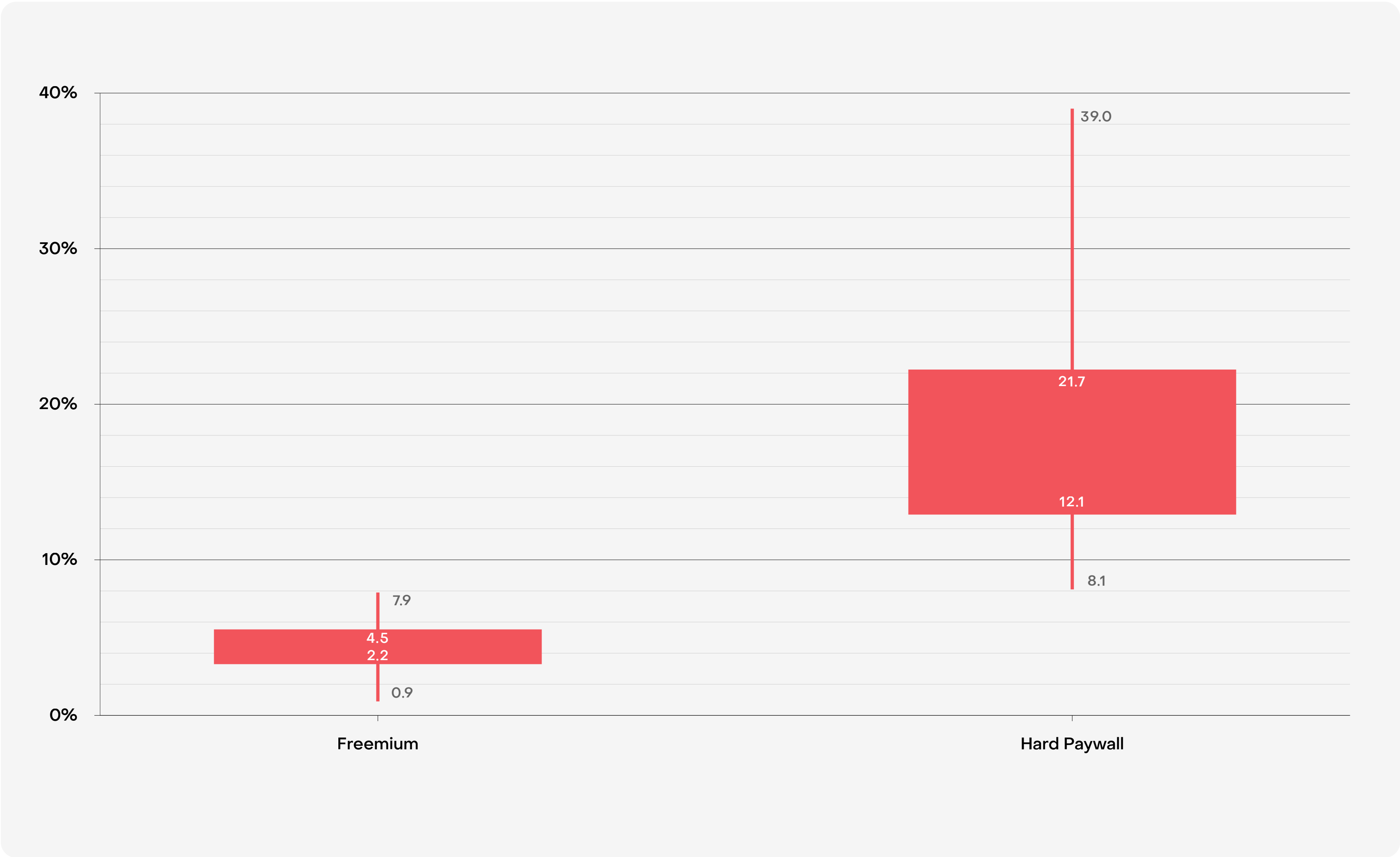
- The top 10% of apps in Health & Fitness and Travel convert at twice the median rate, showing that strong onboarding and engagement strategies can dramatically impact retention, even within the same category
- Education and Media & Entertainment lag behind. These categories have some of the lowest Day 35 conversion rates, likely due to high upfront engagement requirements (Education) and alternative monetization options (Media & Entertainment, such as ads)
- The bottom quartile struggles across the board. Even in top-performing categories, the bottom 25% of apps see very low conversion rates. This reinforces that pricing, onboarding, and product experience play a bigger role than category alone

Day 35 Download to Paid, By Geography

The top 10% of apps in every region significantly outperform the median, showing that localized strategies and strong execution matter more than geography alone.



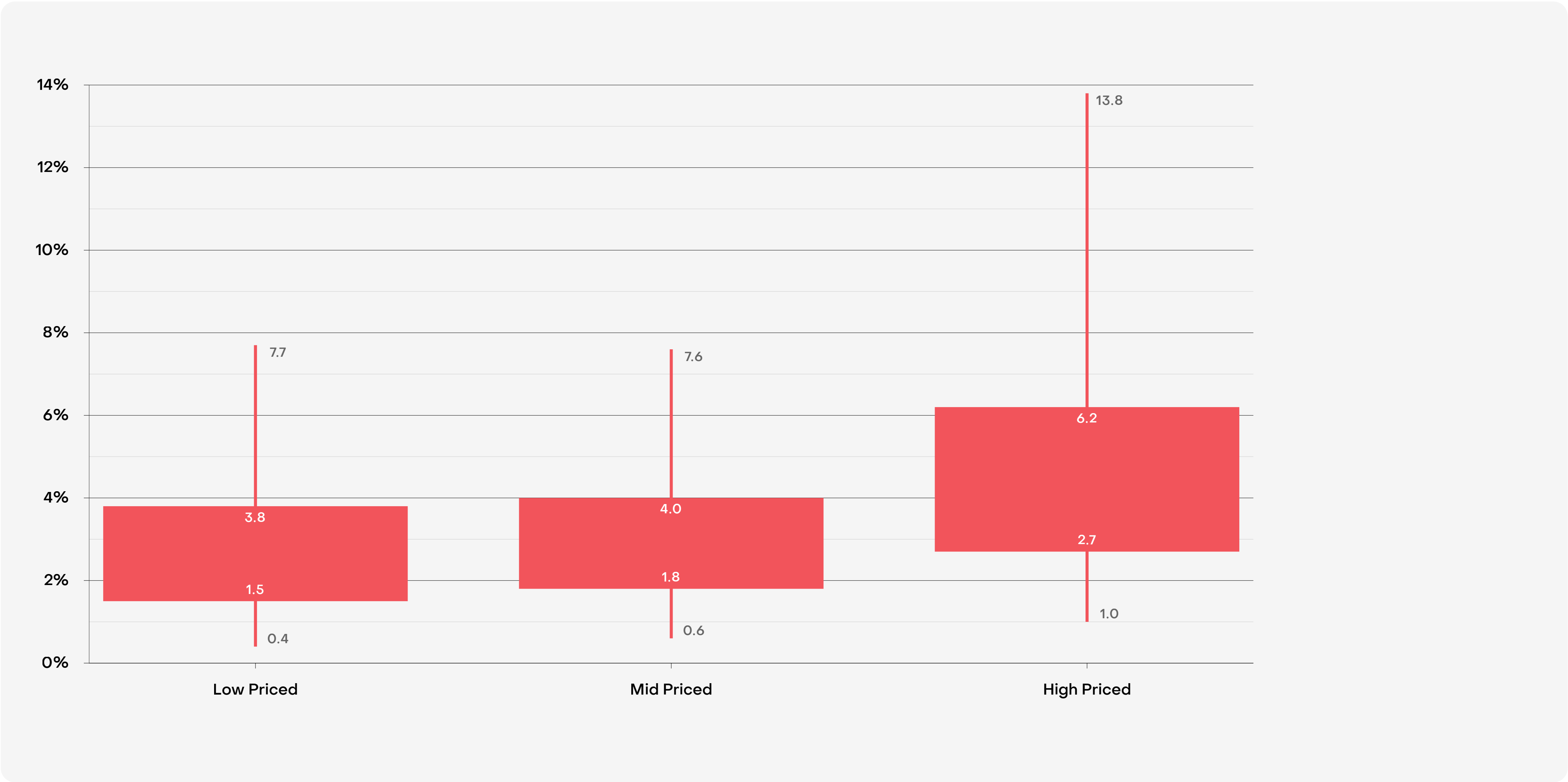
Day 35 Download to Paid, By Access



- Hard paywall apps convert downloads to paid users at a much higher rate than freemium apps, suggesting that a forced commitment model can work—but only if the value is clear upfront
- While the median is low, the top freemium apps still perform well, showing that strong feature gating, well-timed upsells, and premium content can drive paid conversions over time
- While hard paywall apps see higher Day 35 conversion rates, they also risk higher churn if users feel locked in too early. Onboarding and first-time experience are critical

Day 35 Download to Paid, By Price Point

Apps with higher price points see better Day 35 conversion rates, with a median of 2.7% compared to 1.5% for low-priced apps. This suggests that higher-value offerings attract more committed users willing to pay.



Maximize conversions with premium positioning and hard paywalls

Looking at download to paying conversion, North America continues to dominate with an impressive 5.5% upper quartile and 10.5% at P90.

These numbers should inspire us – especially if you’re targeting the US market with a Health & Fitness, Education, or Business app. **Right now, combining premium positioning with a hard paywall is your strongest path to success in these categories.**

The hard paywall data is particularly interesting – we see 12.11% median conversion versus just 2.18% for freemium. Looking deeper at categories, Health & Fitness is hitting 12.1% at P90, with Business at 10.1%. Premium pricing shows strong results too – 2.66% median Download-to-Paying for high-priced apps versus 1.49% for low-priced. But here’s

where it gets interesting: lower price points are actually showing stronger trial-to-paid conversion (47.8% versus 28.4% for high-priced).

A critical insight: 80–90% of all trials happen on Day 0.

This really hammers home how crucial your onboarding experience is – you’ve got one shot to get it right. While data shows longer trials currently converting better at 45.7% versus 26.8% for shorter ones, don’t take this as gospel. **The best apps are hitting over 60% trial-to-paid conversion regardless of trial length. That’s where we should all be aiming.**

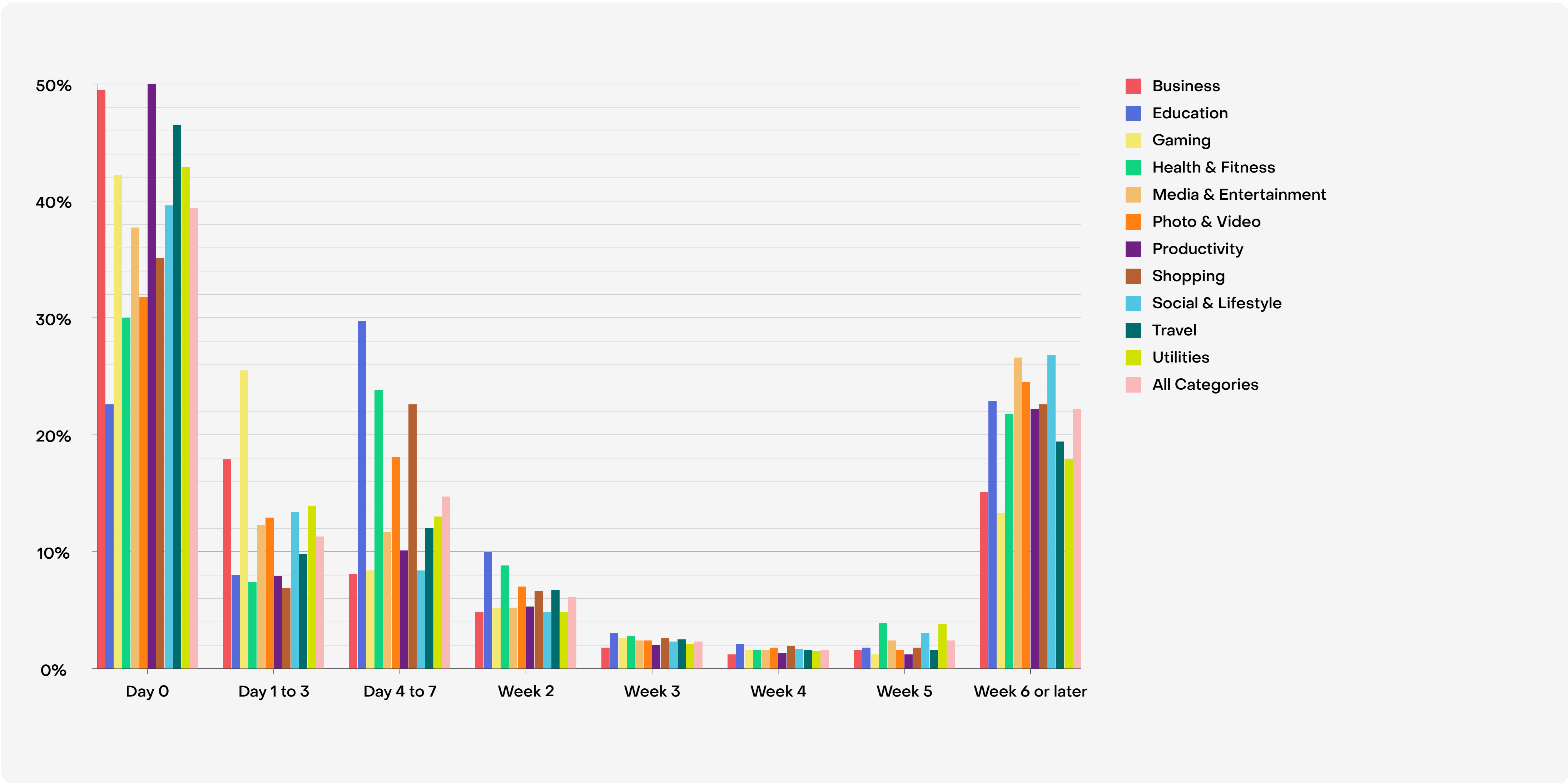
Keep an eye on that balance between trial uptake and conversion rate. While lower prices might drive more trials, watch your ARPU closely. Test different price points, but always connect it back to lifetime value.



Hannah Parvaz
Founder of Aperture

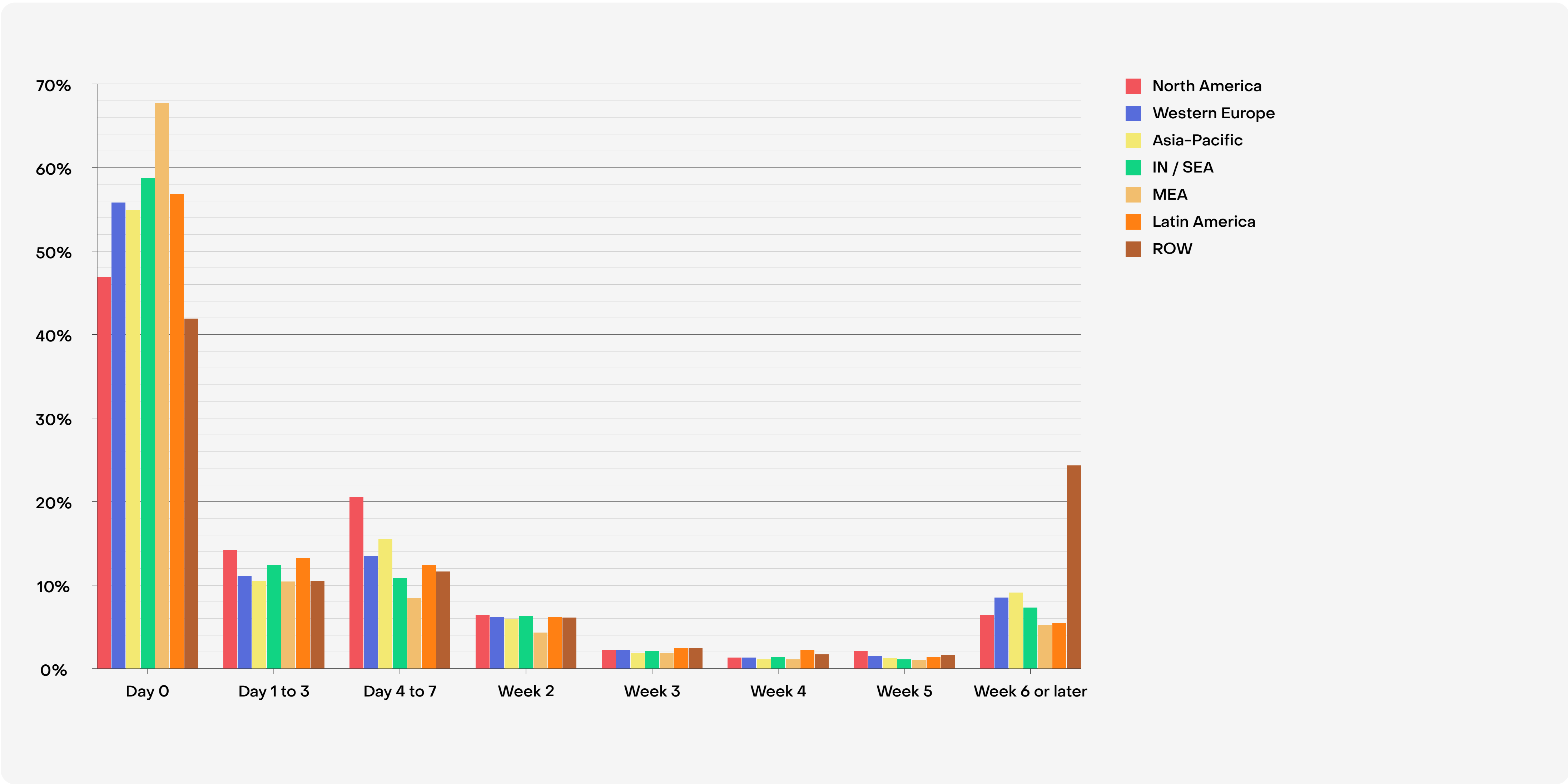
Time to Paid, By Category

Across all categories, the majority of trial-to-paid conversions occur immediately, highlighting the importance of first impressions, clear value propositions, and well-optimized paywalls.



Time to Paid, By Geography

Latin America and ROW have more late-stage conversions. These regions see a higher share of Week 6+ conversions, suggesting that users may need more time, pricing incentives, or reminders before committing.



How to build more successful paywalls



Sylvain Gauchet
Reading.com / Growth Gems



1 Make the screen before the paywall count

Users don't decide to subscribe when they see the paywall – they decide before they get there. Build excitement in your onboarding flow by clearly communicating value and showcasing key features early. Apps that get this right see higher conversions because the upgrade feels like a natural next step.

2 Use loss aversion to boost upgrades

Guide users through setting up premium features during onboarding before they hit the paywall. If they don't subscribe, remind them of everything they'll lose—tapping into both the sunk cost fallacy and loss aversion to drive conversions. This strategy makes users more likely to upgrade since they've already invested effort into setting up their experience.

3 Test multi-screen paywalls for better engagement

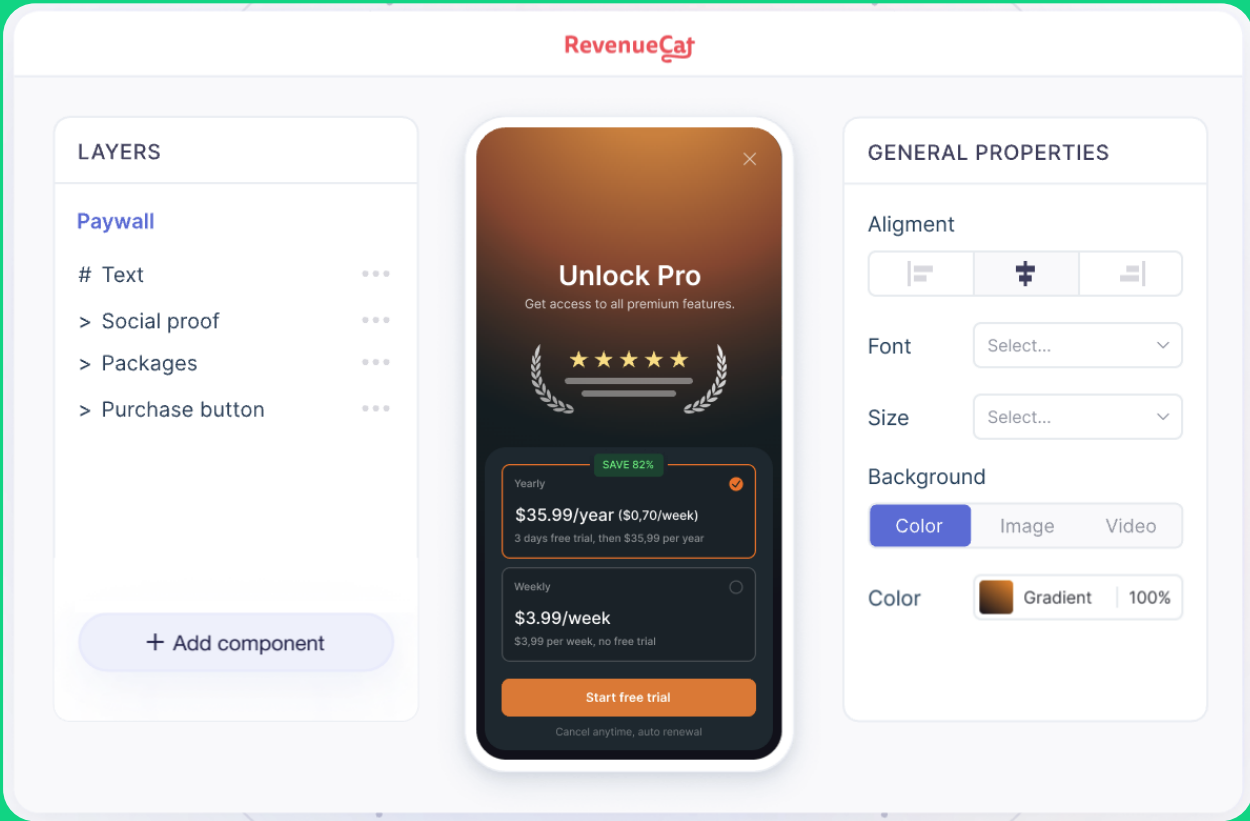
Instead of a single long paywall, break it into multiple screens that highlight different aspects—such as key features, trial details, and premium benefits. This method helps users absorb information in smaller chunks and keeps them engaged longer.



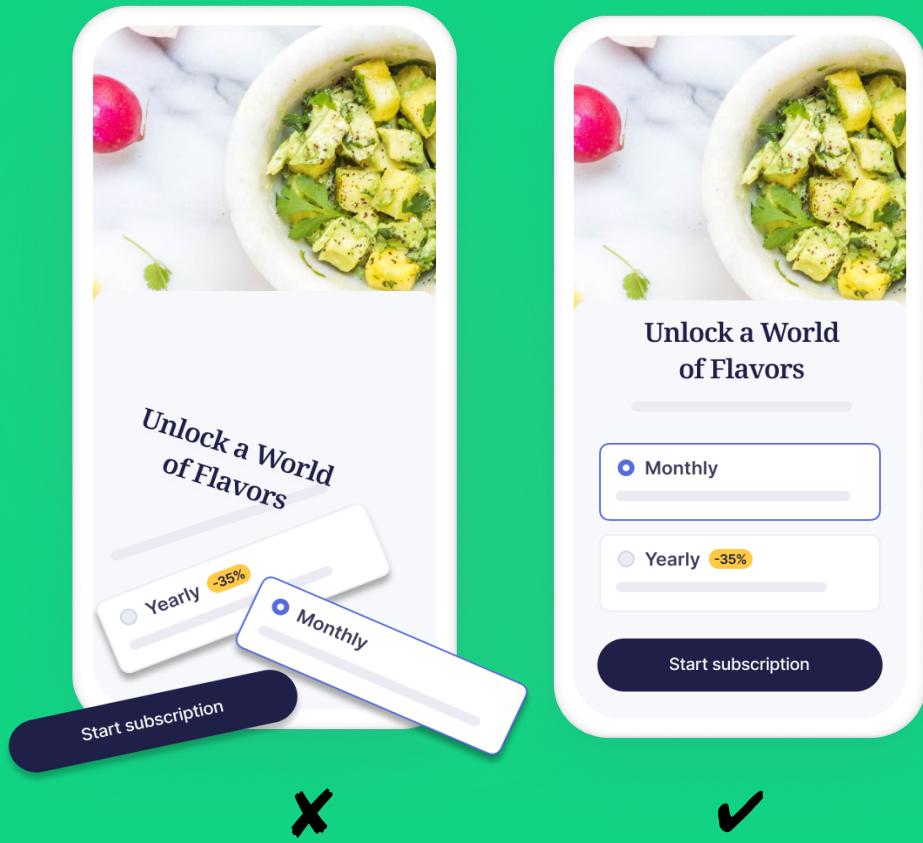
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Create and remotely deploy fully customizable paywalls

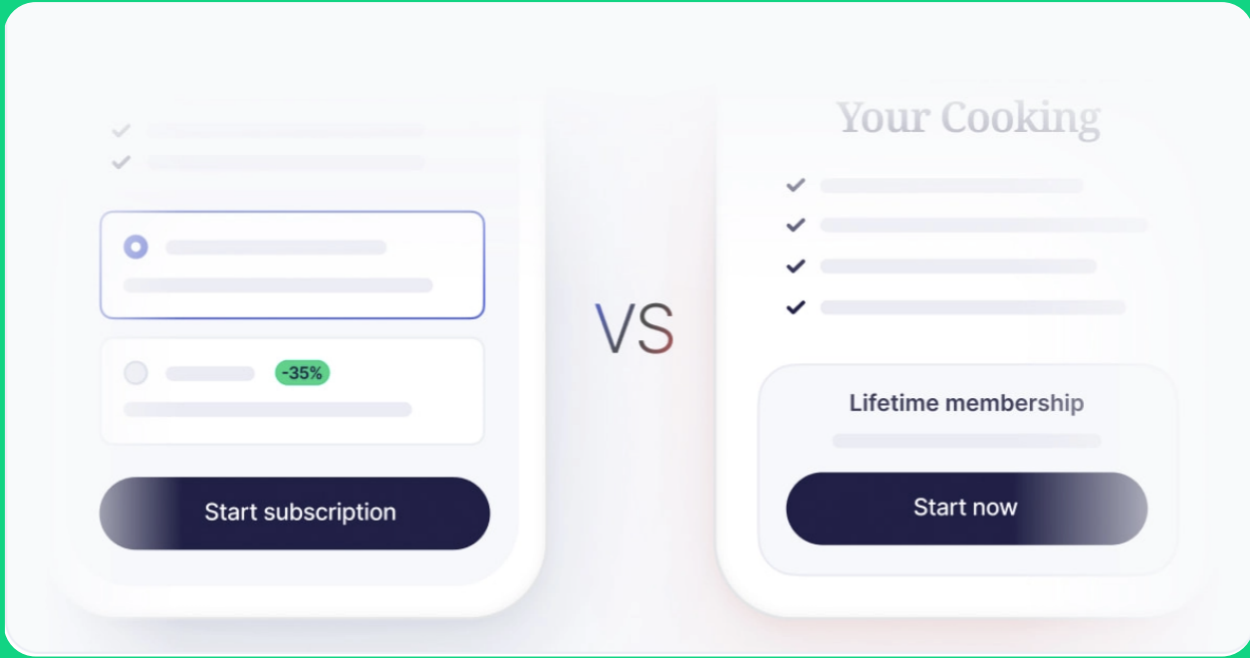
Take full control with our intuitive, layer-driven WYSIWYG editor—start with a template, replicate a design, or build from scratch.



Build native paywalls for seamless performance and higher conversions—integrated directly into your app for speed, reliability, and results.



Maximize conversions with RevenueCat’s built-in segmentation, testing, and analytics tools.

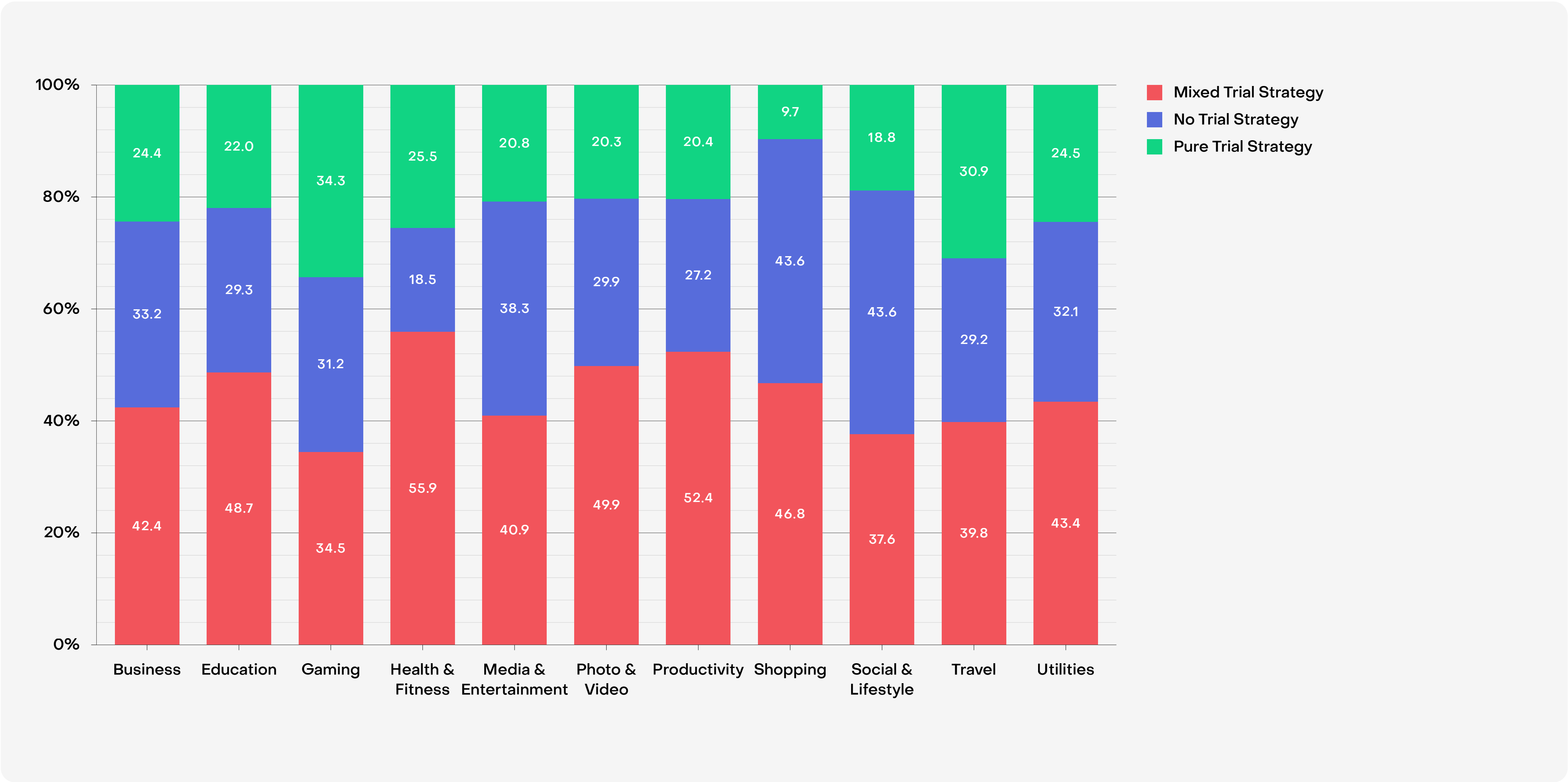


Monetization

02

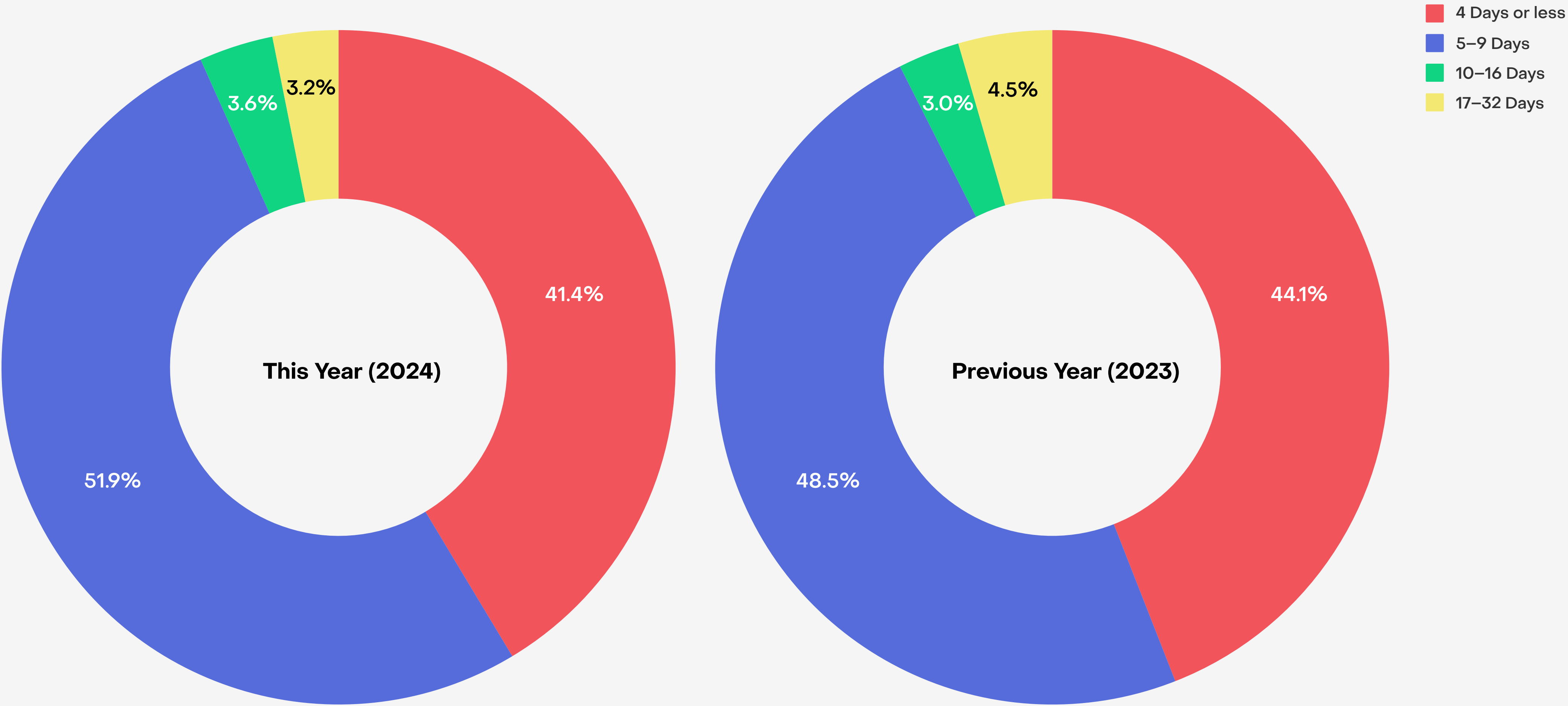
Trial Strategy, By Category

Health & Fitness apps are the most likely to use a mixed trial strategy (56%), while Shopping & Social & Lifestyle apps have the highest share of no trial strategy (44%). Gaming apps are among the most likely to adopt a pure trial strategy (34%).

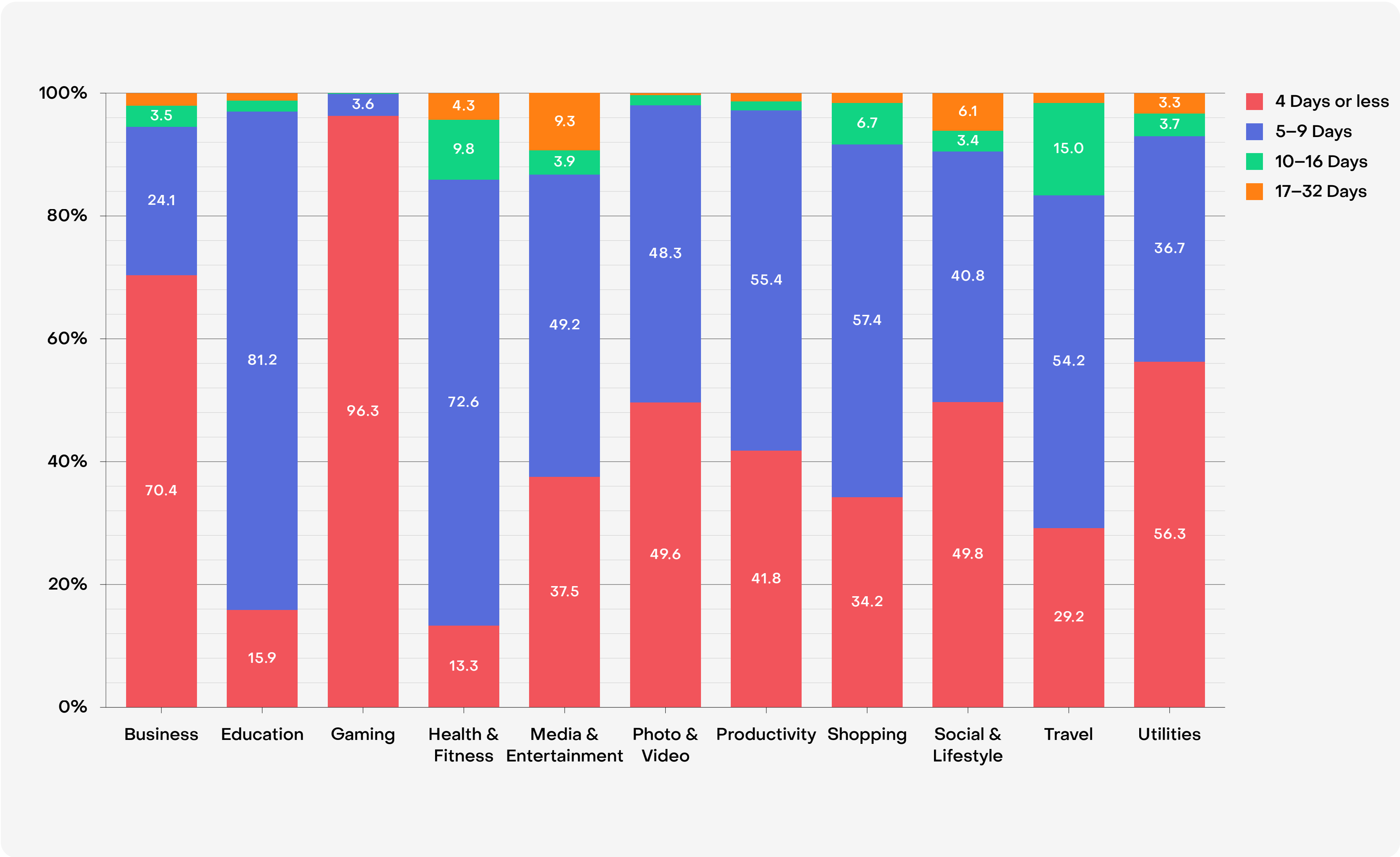


Trial Durations, Year Over Year

In 2024, over half (52%) of all trials were offered for 5–9 days, up from 48.5% in 2023. Meanwhile, shorter trials (4-day-or-less) declined, suggesting a shift toward slightly longer trial periods across app categories.



Trial Durations, By Category



- Gaming apps overwhelmingly favor shorter trials, with 96.3% lasting four days or less. This could suggest that developers prioritize quick conversions, possibly due to high engagement within the first few days
- Education & Health & Fitness apps stand out for their longer trial durations, with over 80% lasting 5-9 days or more. This could reflect the need for users to experience enough content before committing, especially in environments where progress takes time
- Media & Entertainment and Travel apps have a more balanced trial distribution, with a significant portion of trials extending beyond 9 days, giving users more time to experience & evaluate their services before converting into paid subscriptions

How to maximize revenue with regional pricing



Dmitry Gurski
Flo



1 Know your audience — not just the economy

Don't rely on basic indexes like the Big Mac Index. Instead, understand your audience in each region. For example, iOS users in emerging markets are typically wealthier than Android users, so pricing should reflect each platform's unique audience.

2 Test prices with a focus on revenue, not conversion

Measure pricing success by average revenue per user (ARPU), not just conversion rates. Lower prices can improve retention and increase the volume of paying users, making customer acquisition more cost-effective.

3 Adapt to cultural norms and payment habits

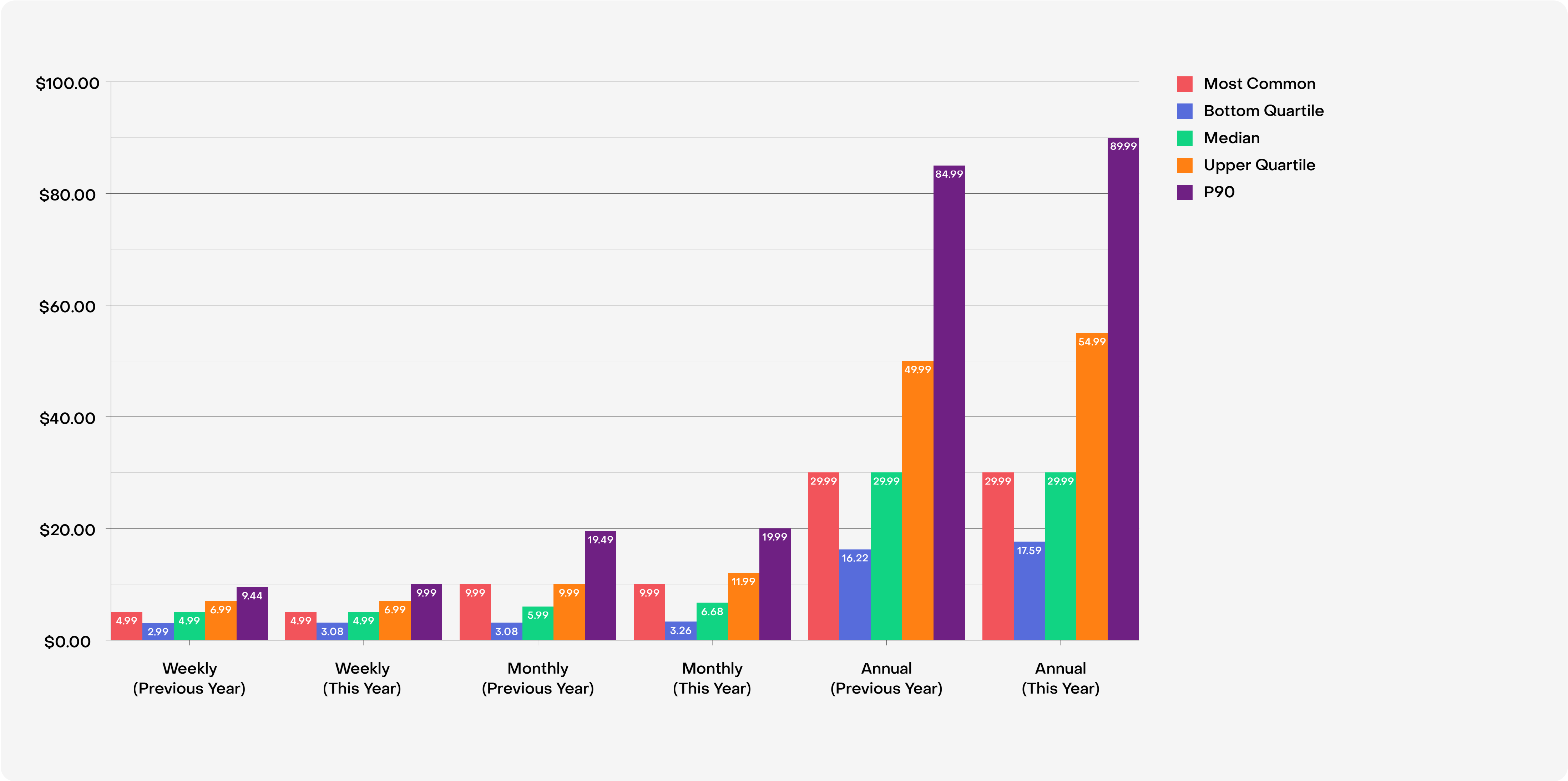
Price sensitivity varies by culture and is influenced by local norms. As more consumers get comfortable paying for digital products, adjust pricing strategies to reflect changing habits and regional preferences.



Listen to Dmitry's Minisode
(~15 min) on the Sub Club Podcast

Price Points By Plan Duration, Year Over Year

In general, median prices remained flat year-over-year. However, the most expensive apps got even more expensive, with P75 and P90 prices rising slightly across most plan durations.



Median Price Per Plan Duration, By Category

	Weekly (\$)	Monthly (\$)	Annual (\$)
Business	6.15	7.58	37.50
Education	5.99	8.38	44.99
Gaming	4.99	4.99	20.55
Health & Fitness	4.99	9.70	39.99
Media & Entertainment	4.99	5.24	29.99
Photo & Video	4.99	5.99	29.99
Productivity	4.99	5.99	29.99
Shopping	3.00	5.99	22.24
Social & Lifestyle	4.99	7.99	29.99
Travel	2.99	4.00	18.67
Utilities	4.99	4.99	26.99

Subscription plan pricing can vary significantly across categories – especially when factoring in subscription durations. Some categories cater to shorter commitments while others may prioritize long-term plans. For weekly subscriptions, \$4.99 price points have become commonplace. However, Shopping and Travel apps buck this trend, offering the lowest weekly median prices at \$3.00 each. This may suggest that these categories rely on lower-cost, high-volume subscription models – possibly due to the seasonal or transactional nature of their services.

For monthly plans, median plans tend to be only marginally more expensive than weekly options. In many categories, including Gaming, Media & EEntertainment, and Photo & Video, the median price for monthly subscriptions is within \$1.00 of the median weekly price. For annual plans, Education and Health & Fitness apps offer some of the highest median prices, at \$44.99 and \$39.99, respectively – potentially reflecting a focus on long-term

user commitments.

Across all categories, one thing is consistent: apps are willing to offer steeper discounts for longer subscriptions. On average, median annual subscription prices reflect a 67% discount compared to the annualized total of the median monthly price (median monthly price x 12).

Median Price Per Plan Duration, By Geography

	Weekly (\$)	Monthly (\$)	Annual (\$)
Asia-Pacific	5.39	6.36	32.90
IN/SEA	4.40	4.18	17.96
Latin America	4.35	4.83	19.99
MEA	4.64	5.44	22.86
North America	5.99	8.99	35.99
ROW	4.99	5.11	24.64
Western Europe	6.45	7.99	33.95

Across regions, a few pricing patterns emerge. Western Europe and North America boast the highest median prices across all plan durations. Median weekly prices are slightly higher in Western Europe at \$6.45, while North America has the highest monthly (\$8.99) and annual (\$35.99) prices – both regions likely reflect higher consumer purchasing power, greater willingness to pay for digital services, and app developers optimizing pricing for premium markets.

Conversely, Latin America and IN/SEA have the lowest prices across all durations, where price sensitivity tends to be a larger factor. Annual plans in these regions show particularly steep discounts compared to their monthly equivalents, possibly to encourage long-term commitments and reduce churn.

Asia-Pacific and MEA fall between these extremes, suggesting a balance between affordability and revenue optimization. ROW (Rest of World) pricing is also in the mid-range, possibly reflecting a mix of high and low-income markets. Ultimately, these regional differences highlight how subscription pricing strategies are influenced by economic conditions, consumer expectations, and competition in each market.

Experiment, go premium, and communicate value clearly

Pricing consumer subscription software in 2025 can feel like navigating a maze blindfolded. There's no single answer to how much something should cost – do you prioritize subscribers, margins, or revenue? To find the right approach, focus on three things: experiment, don't be afraid to be premium, and clearly explain the value to your customers.

Experiment

RevenueCat data shows a wide range of successful price points, with the median CSS app at \$29.99 and the upper quartile pricing almost 3x higher. Constant A/B testing is essential to find what works best. Don't get stuck in analysis paralysis – try different price points and learn from the results.

Go premium

Consumers are willing to pay a premium for products that truly solve their problems. Don't be afraid to price your app accordingly, especially if it delivers unique value. Price elasticity varies by market, but the “why” behind the purchase is universal. Make sure your app's value justifies the cost.

Communicate value clearly

In a world full of freebies, it's crucial to communicate your app's value quickly and effectively – especially during the first hour of download. Highlight the unique benefits that set your app apart and make the value obvious to users.

Get out there and build! Just remember: A/B test like a scientist, go premium with confidence, and communicate value like a storyteller

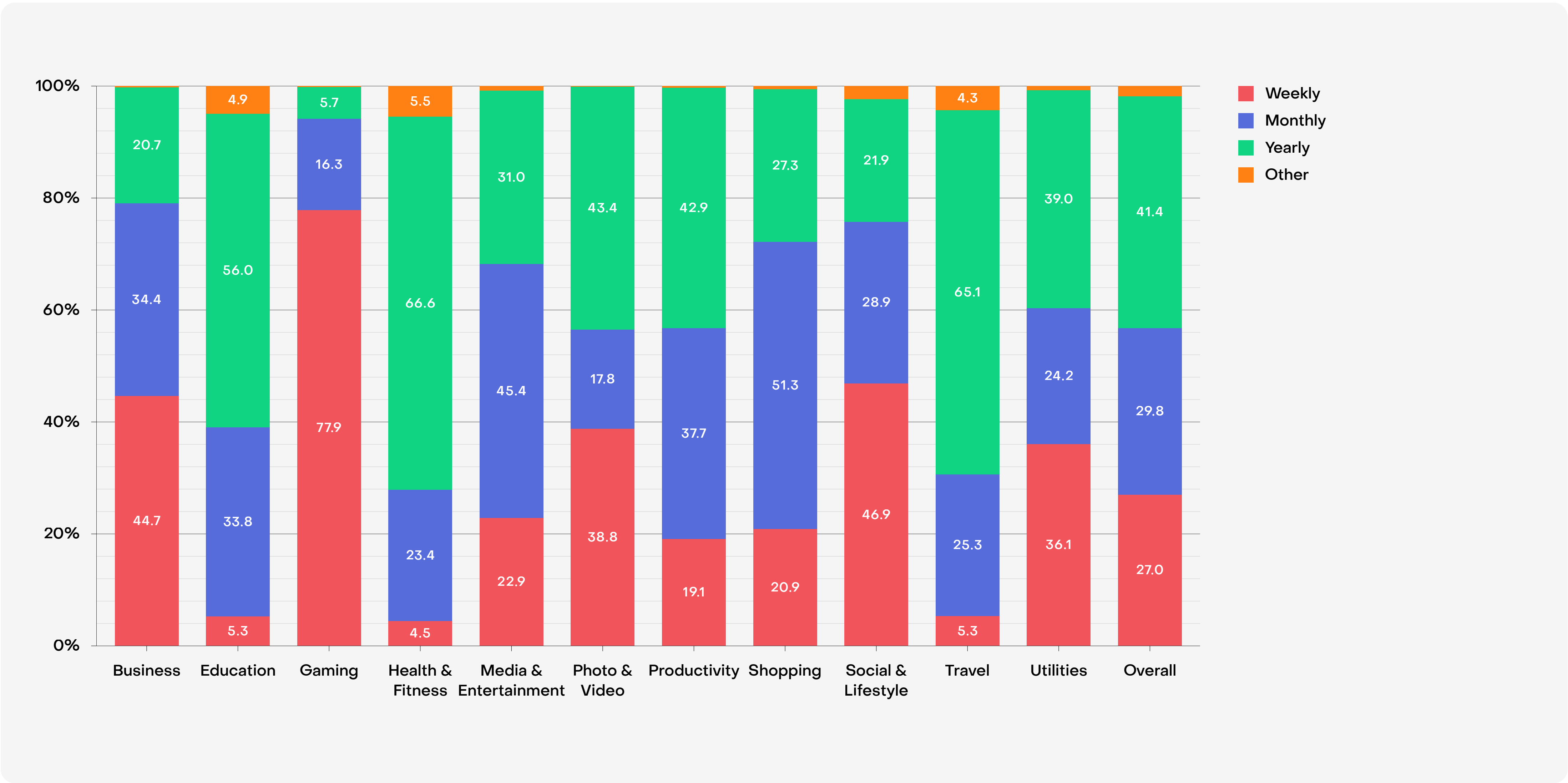


Eric Crowley

Partner at GP Bullhound. Head of Consumer Subscription Software (“CSS”) practice

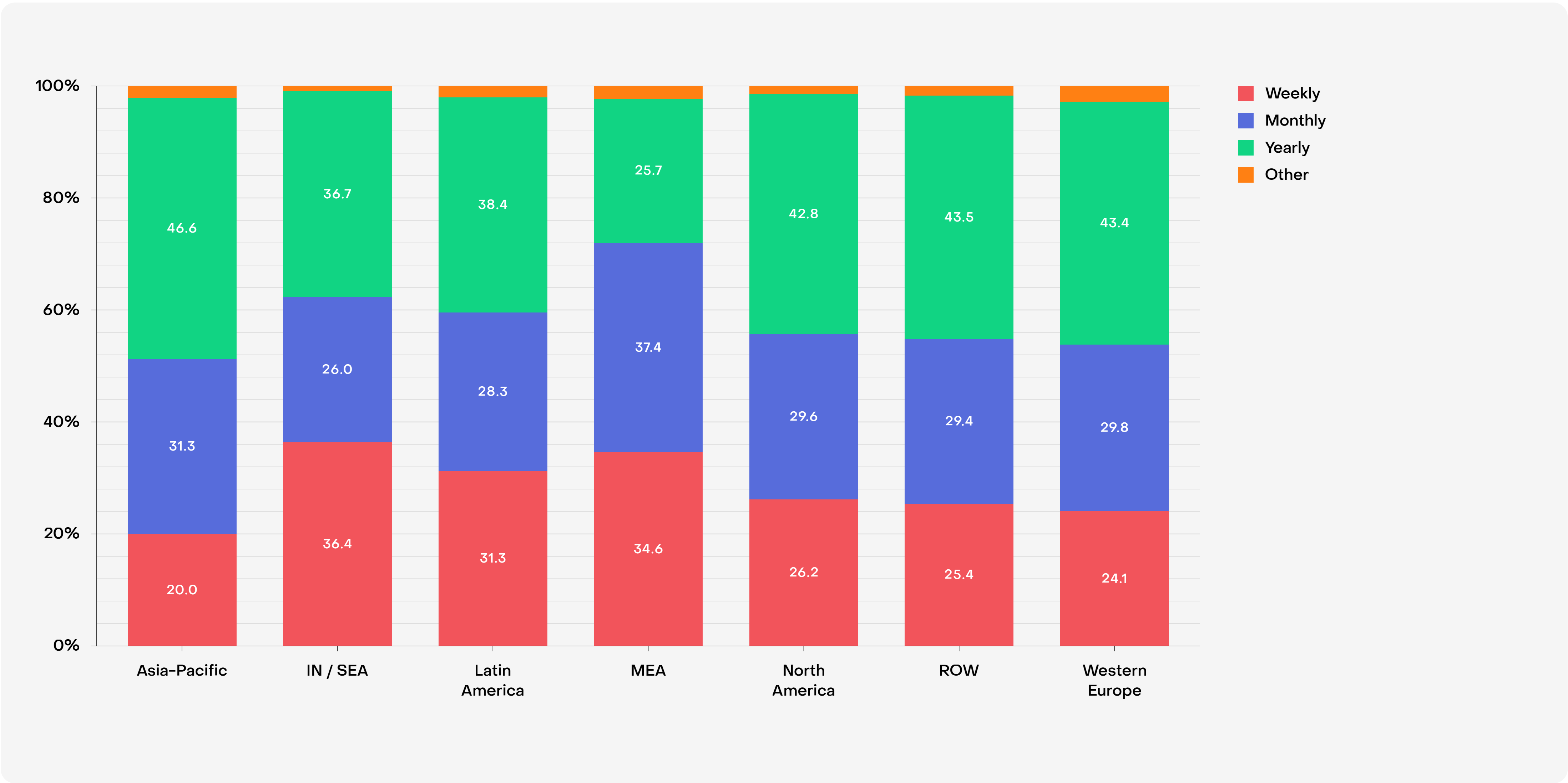
Share of Subscriptions Sold, By Category

Yearly subscriptions dominate Health & Fitness (67%) and Travel (65%), while Gaming (78%) relies heavily on weekly plans. Yearly plans make up the largest share of subscriptions across 7 of 12 categories, as developers prioritize longer commitments.



Share of Subscriptions Sold, By Geography

IN/SEA (36%) and MEA (35%) tend to rely more on weekly plans than other regions. Yearly subscriptions make up the largest share in Asia-Pacific (47%) and North America (43%), while Monthly subscriptions are fairly consistent across regions.



“Let’s just get rid of the monthly plan...”

I wouldn’t be so quick to go there just yet!

For years now publishers have been actively pushing annual plans. And for good reason – faster payback and stronger realised LTV. And yeah, it’s worked. Annual plans are winning.

But driving up the % of users on an annual plan may not be the best thing for your app. Not all categories lend themselves to long term commitments. And forcing it runs the risk of lowering total revenue.

Let’s look at the numbers:

- **Weekly plans dominate** in Business, Social & Lifestyle, and Gaming—as much as annual plans dominate in Health & Fitness, Travel, and Education.
- **Monthly plans thrive** in Shopping, Media & Entertainment, where commitment is lower, but recurring spend is high.
- **And it gets even trickier across geos.** What works in one market might tank in another. No one-size-fits-all here.

So, the real questions are:

- What commitment length does our value proposition naturally support?
- How do we serve the right plan, at the right time, in the right market; to maximize realized LTV without harming overall revenue?



Nathan Hudson
Founder and CEO of Perceptycs

Monetization Mix, By Category

Most categories rely heavily on subscriptions only. Nearly 20% of Social & Lifestyle apps offer a combination of Subscriptions & Consumables, while Gaming apps continue to lean into a more even mix of monetization strategies.



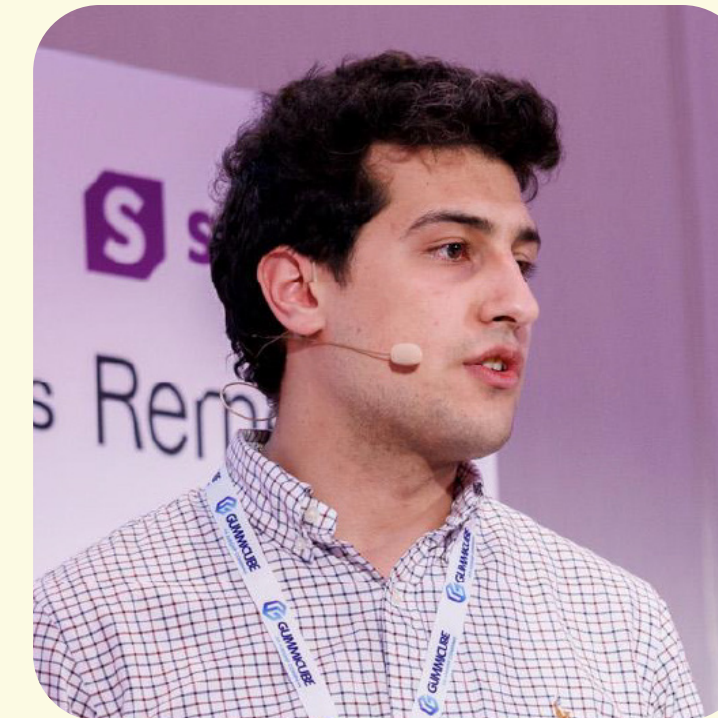
Boost LTV by combining subscriptions with consumables

One of the most overlooked strategies for subscription apps is adopting a hybrid monetization model that combines subscriptions with consumable in-app purchases. While gaming apps have successfully leveraged this approach for years, subscription-based apps are lagging behind.

Based on the data, gaming apps have a strong mix of both subscriptions and consumables, demonstrating how this model can work effectively. However, most non-gaming categories remain heavily reliant on subscriptions alone, missing out on additional revenue streams. For instance, Health & Fitness and Productivity apps primarily focus on subscriptions, while consumables remain underutilized.

By integrating consumables—such as one-time purchases for premium content, AI-generated insights, or feature unlocks—subscription apps can better capture user demand and increase overall LTV. Users who may not commit to a full subscription might still be willing to make smaller purchases, providing an additional revenue layer.

The key takeaway here is that hybrid models allow apps to monetize different user segments more effectively, reducing churn and improving retention. As the subscription market matures, adopting this strategy will be crucial for sustained growth and profitability. Subscription apps need to take inspiration from gaming and embrace diversified revenue models to stay competitive.

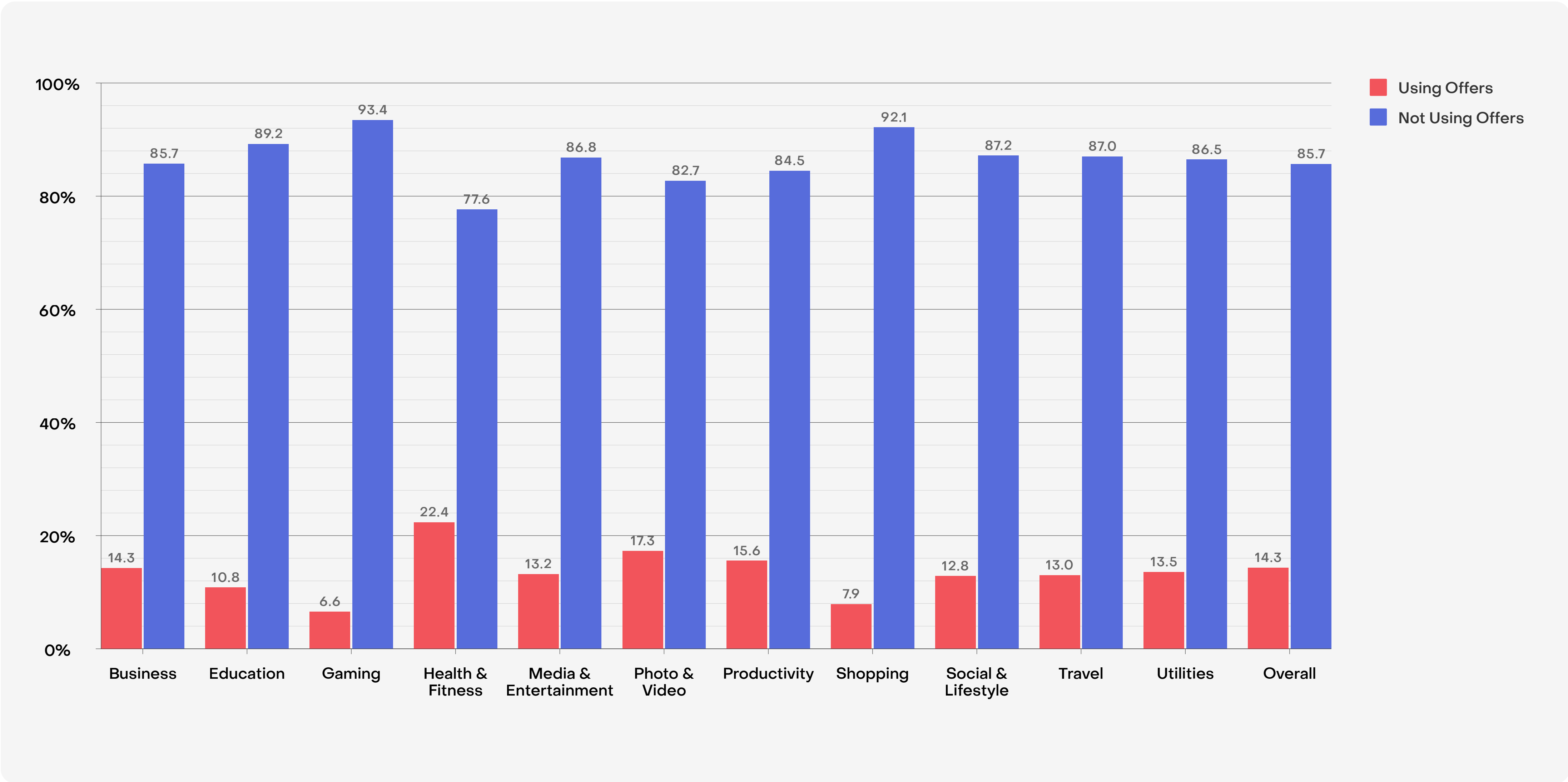


Vahe Bagdasaryan

Growth Manager at Flo Health
& App Growth Consultant

Offer Usage, By Category

Around 13% of apps use offers across all categories, while Health & Fitness apps leveraging them the most (22%) and Gaming apps the least (6.6%).



How to increase monetization with targeted upsells



Brandon Gador
onX Maps



1 Educate users about paid features

Don't assume users know they're on the free tier or understand the value behind premium features. Clearly communicate the benefits of upgrading through in-app education and feature highlights. Show users what they're missing to increase the perceived value of paid tiers.

2 Target the right users at the right moment

Effective upsells require thoughtful timing and targeting. Segment users by behavior and trigger upsells when they're most likely to convert, such as after interacting with a related feature. Contextual nudges feel more natural and less intrusive, increasing the likelihood of conversion.

3 Maintain a seamless user experience

Upsells are most effective when integrated naturally into the user journey. Avoid disruptive pop-ups - place upgrade prompts where they align with user actions. Maintain continuity in messaging to make the transition from free to paid feel logical and valuable.



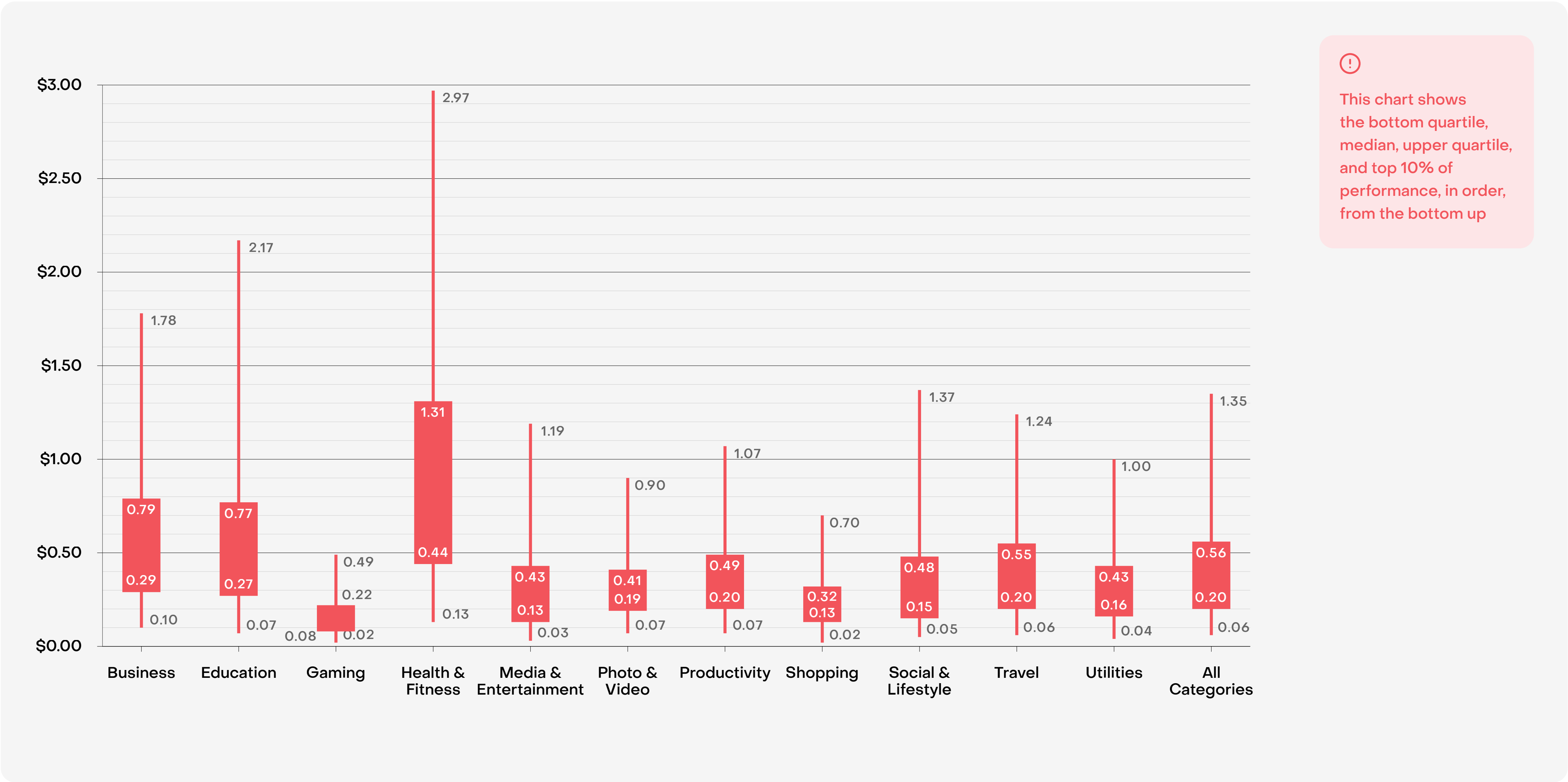
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Revenue

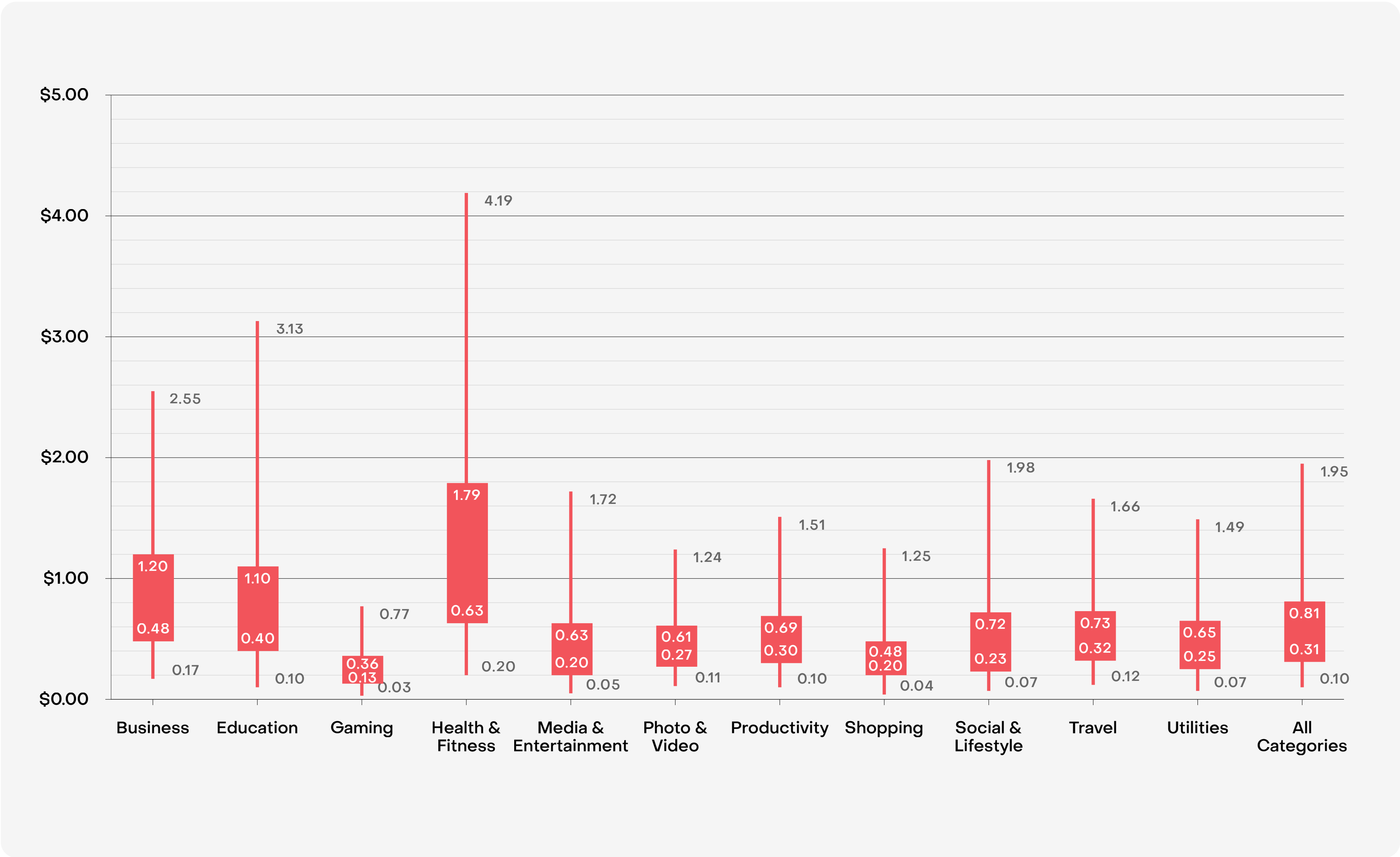
03

Average Revenue per Install After 14 Days, Split By App Category

On average, apps in the upper quartile make 2.75x more than the median after 14 days. Health & Fitness apps lead all categories with a median 14-Day ARPU of \$0.44 and an upper quartile value of \$1.31.



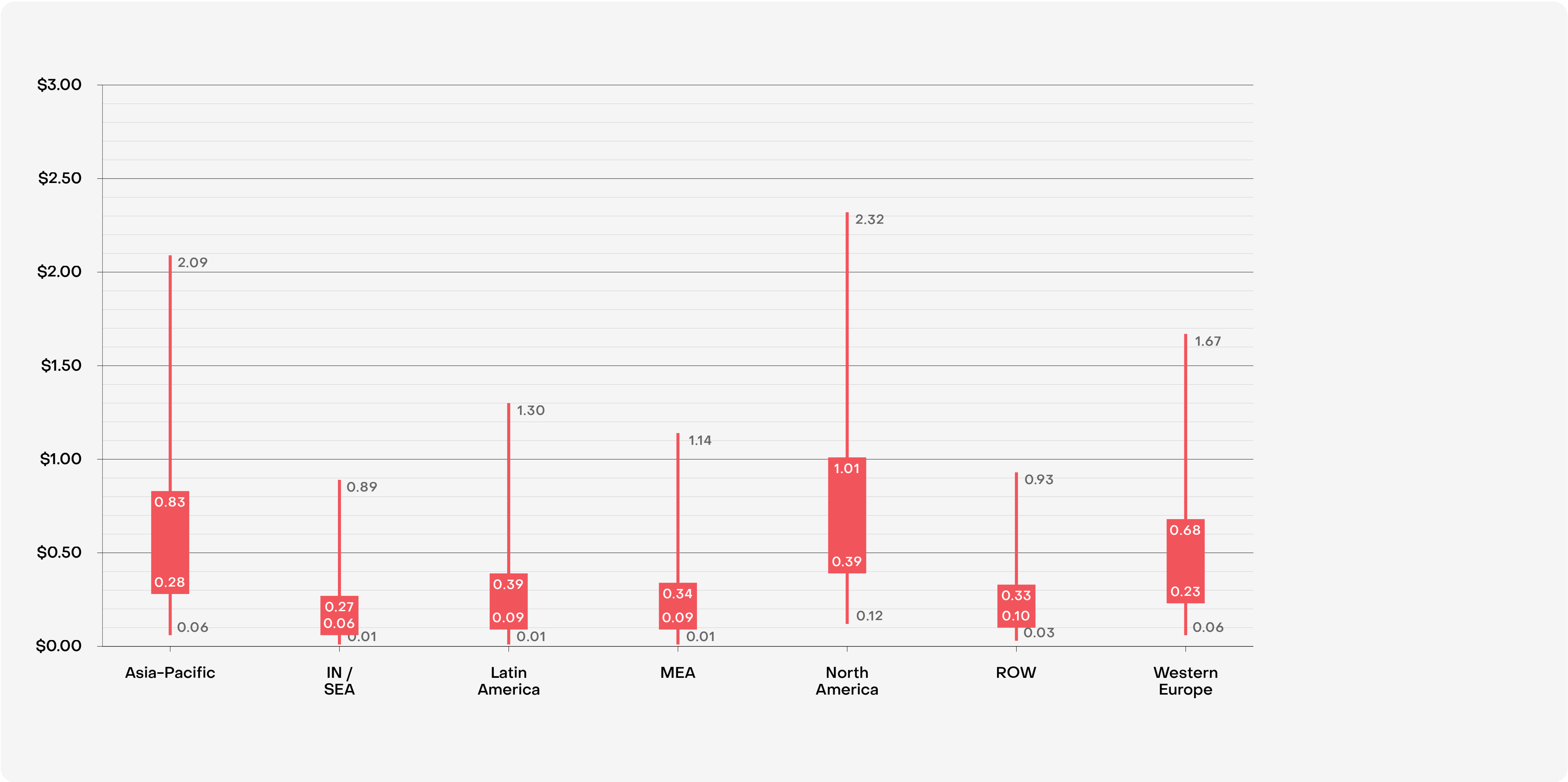
Average Revenue per Install After 60 Days, Split By App Category



- Health & Fitness apps continue to dominate long-term revenue per install, with the highest P90 value (\$4.19) and strong performance across quartiles. Their ability to more than triple the median (\$0.63) by P90 suggests strong retention, upselling, and recurring revenue potential
- Education apps show a significant revenue jump at the high end, with P90 (\$3.13) nearly eight times the median (\$0.40). This indicates that while most apps earn modestly, top performers monetize exceptionally well—possibly through long-term subscriptions, premium content, or bundled educational resources
- Photo & Video, Social & Lifestyle, and Travel apps show similar trends, where top apps earn 5–7 times more than the median, showing that while monetization can be challenging in competitive categories, premium or niche offerings allow certain apps to generate significantly higher revenue than their peers

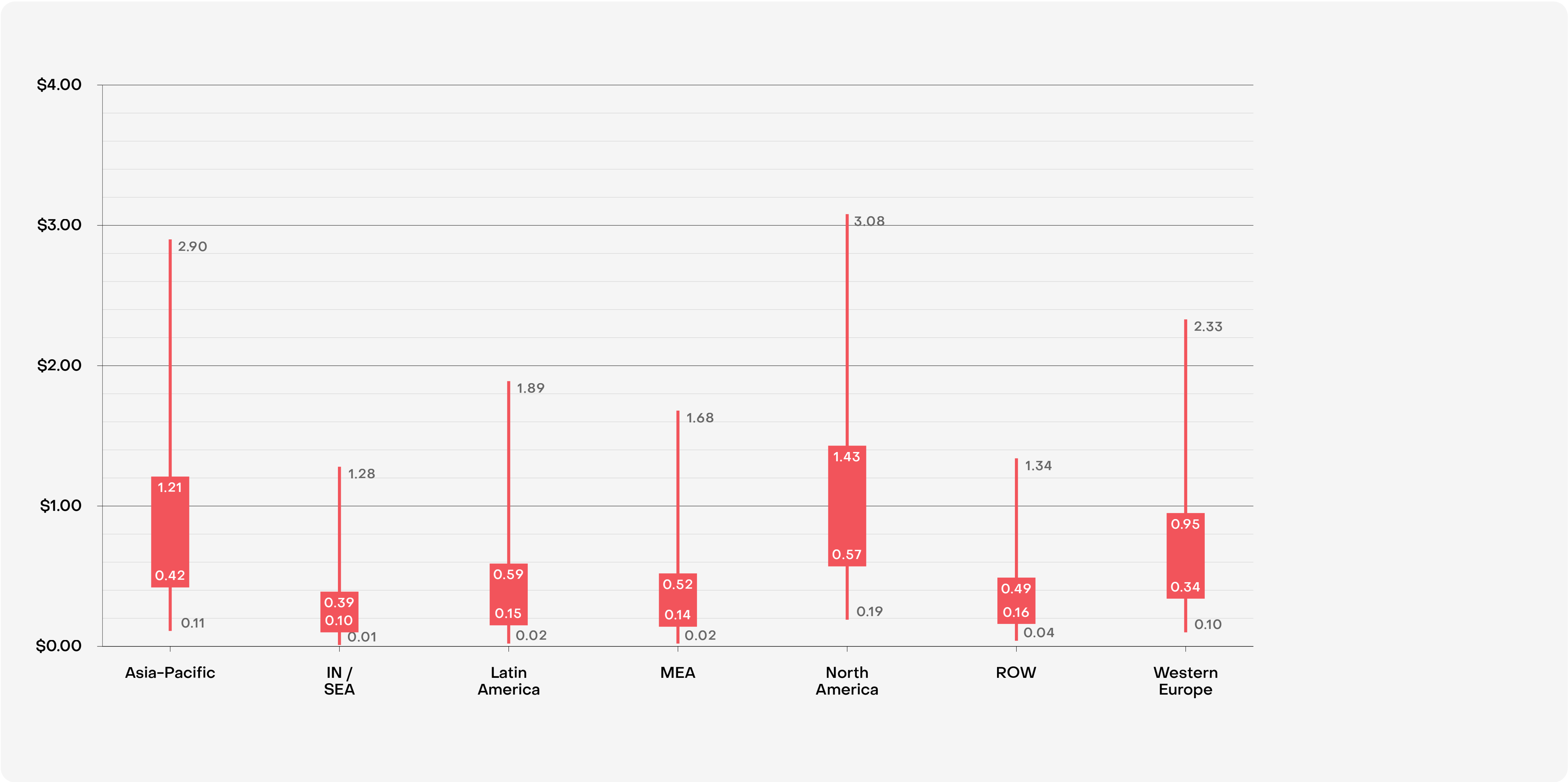
Average Revenue per Install After 14 Days, Split By Geography

North America leads in revenue per install (\$0.39 Median), while Asia-Pacific is not far behind. Meanwhile, IN/SEA and Latin America see the lowest median values (\$0.06–\$0.09), highlighting regional monetization disparities.



Average Revenue per Install After 60 Days, Split By Geography

North America and Asia-Pacific continue to lead in 60 revenue per install. Median values in these regions are on par with the upper quartile marks in most other regions.



How to use segmentation to maximize LTV



Greg Stewart
Ladder



1 Segment early to acquire the right users

Long-term retention starts before users even download your app. Ladder segments potential users through quiz-based onboarding, tailoring messaging and acquisition strategies to fitness personas. Speaking to the right audience from the start leads to higher engagement and better retention.

2 Optimize trial experience for activation, not just conversion

Instead of pushing for immediate sign-ups, Ladder removes credit card barriers and focuses on getting users to complete their first workouts. Those who finish at least two workouts in the trial are far more likely to convert and remain subscribers long-term.

3 Match pricing offers to user engagement

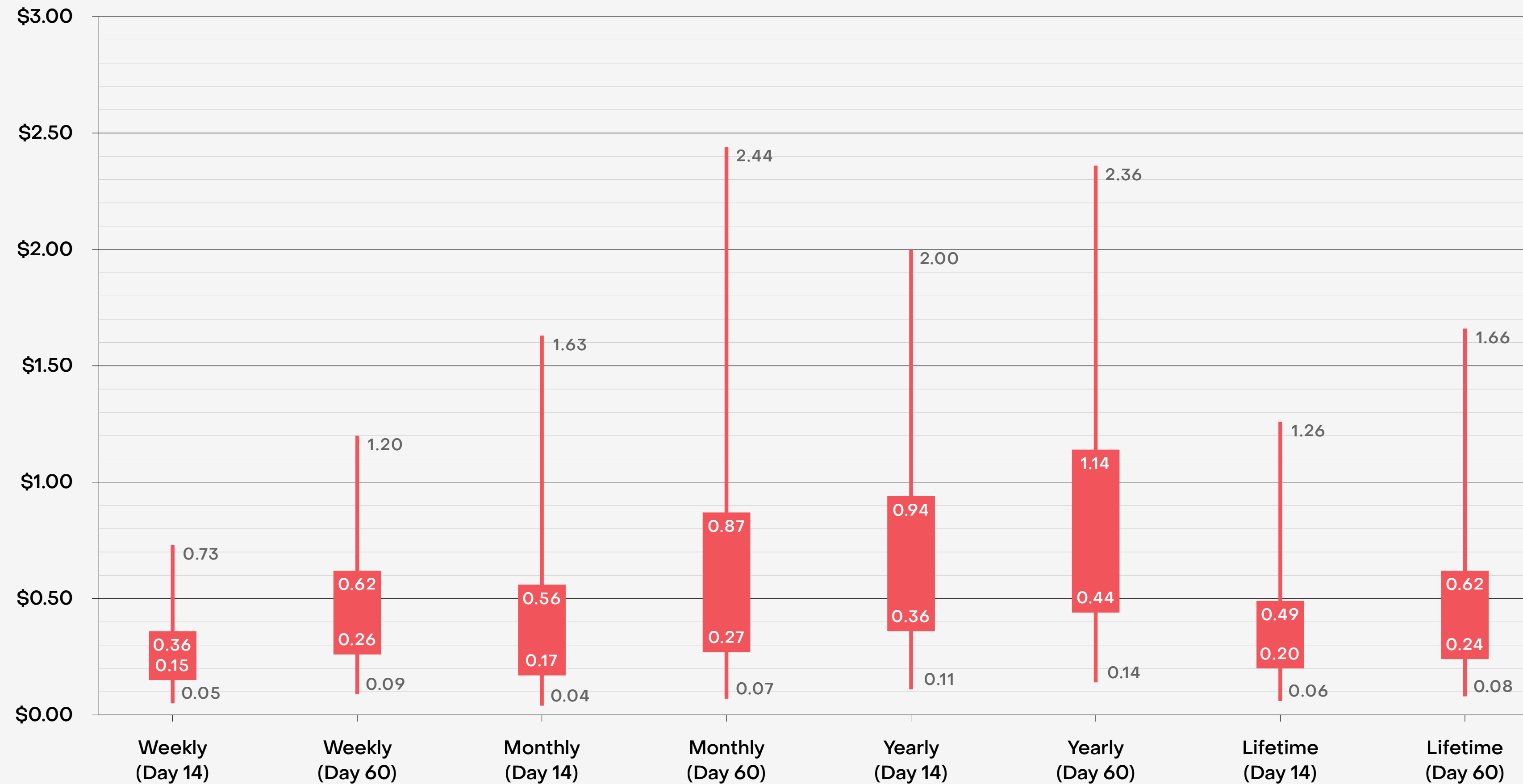
Not all trial users should see the same offer. Ladder segments post-trial users based on their workout completion history. Engaged users are encouraged to commit to annual plans, while inactive users see monthly offers with first-month discounts to lower the barrier to entry.



Listen to Greg's Minisode
(~15 min) on the Sub Club Podcast

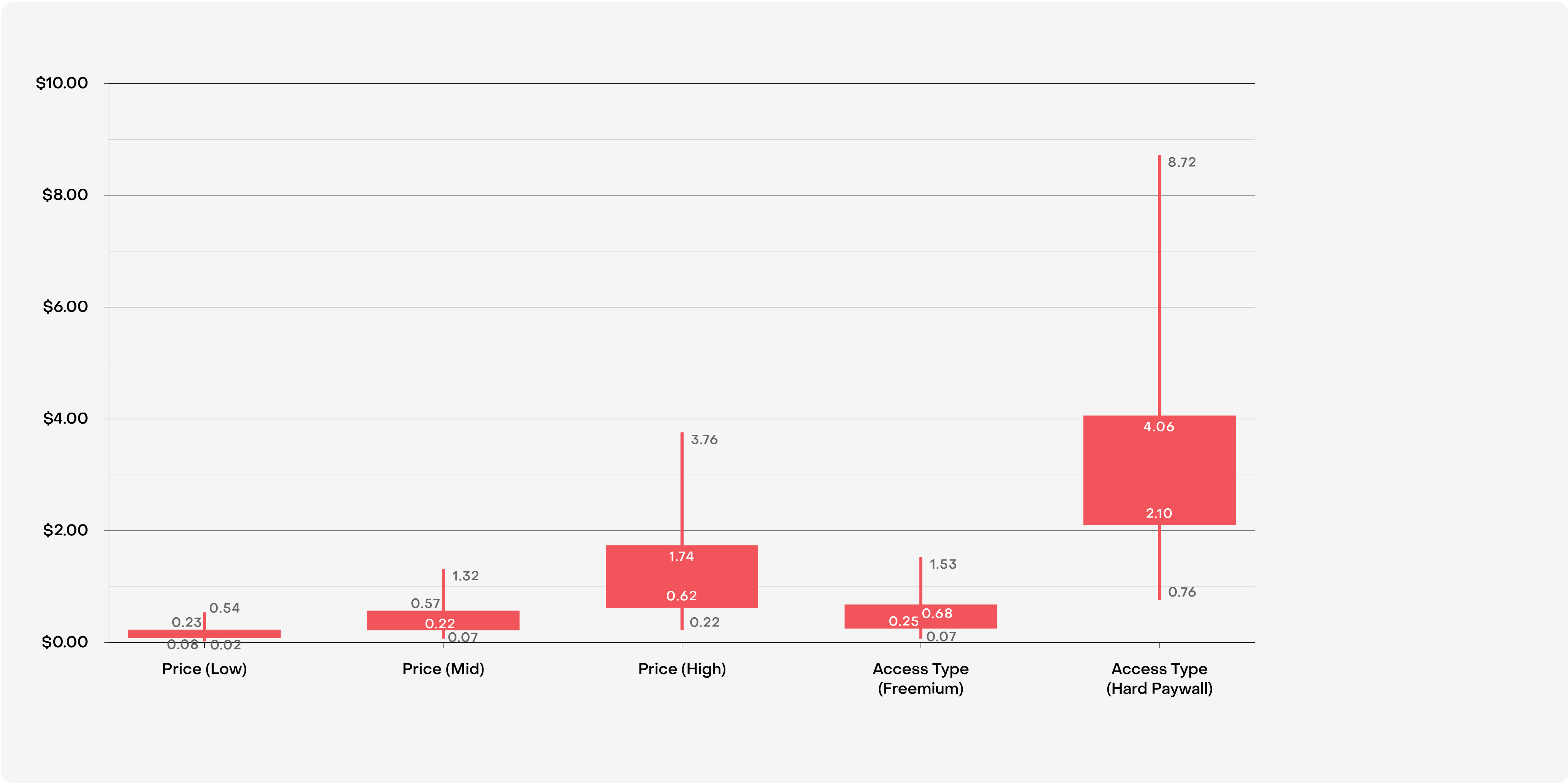
Average Revenue per Install After 14 & 60 Days, Split By Plan Duration

Monthly plans see the highest jump in revenue per install between day 14 and day 60 – with the upper quartile rising from \$0.56 to \$0.87 and P90 rising from \$1.63 to \$2.44.



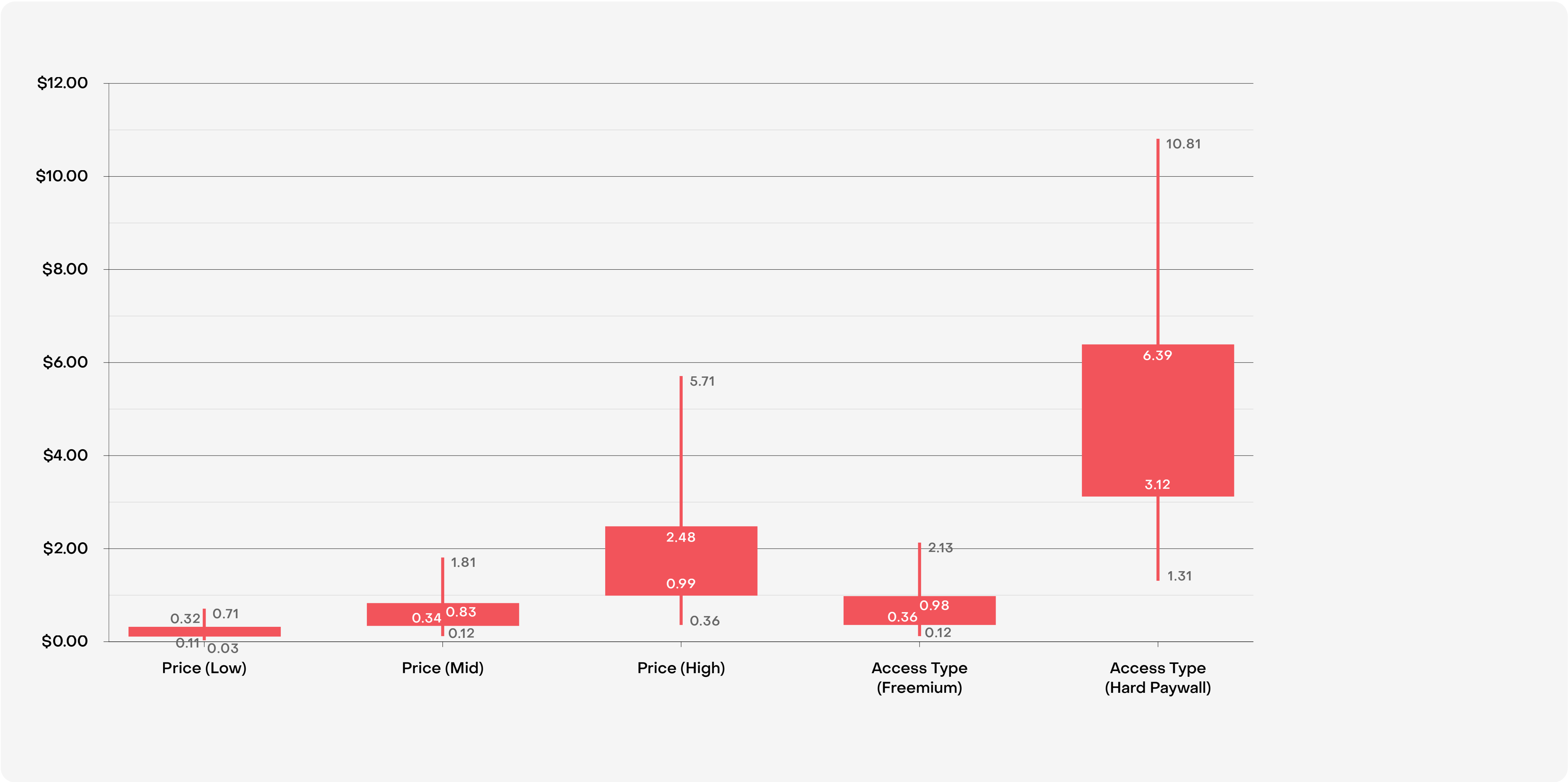
Average Revenue per Install After 14 Days, Split By Access Method & Pricepoint

Average revenue per install is highest after 14 days for high-priced apps (as expected). Median 14-day revenue is approximately 8x higher for apps with hard paywalls vs. those with freemium models.



Average Revenue per Install After 60 Days, Split By Access Method & Pricepoint

Average revenue per install continues to grow across all price points and access types from day 14 to day 60 – with median values growing by an average of 51%.



Early monetization varies by category – optimize accordingly



Steve P. Young
Founder and CEO of App Masters

The Revenue per Install (RPI) data reveals significant differences in early monetization across app categories.

Health & Fitness apps dominate with a median RPI of **\$0.44** and a P90 of **\$2.97**, suggesting strong early subscription adoption. **Business (\$0.29)** and **Education (\$0.27)** apps also perform well, likely due to premium content and professional tools. In contrast, **Gaming (\$0.08 median)** struggles with early monetization, relying on long-term engagement and in-app purchases.

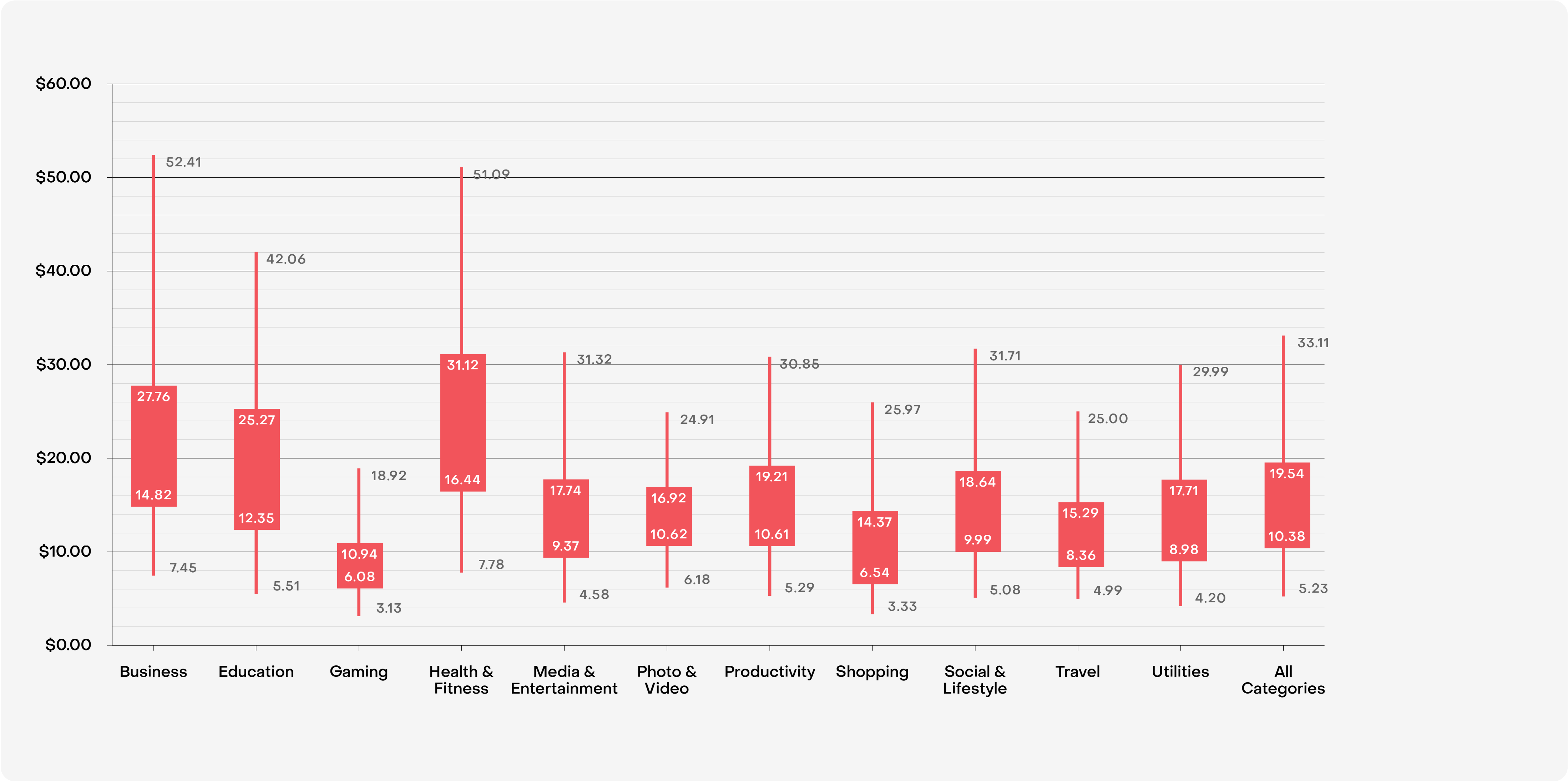
Key actionable tips for developers:

- 1. Prioritize subscriptions for high-monetizing categories** – Health, Business, and Education apps should focus on free trials, higher yearly prices (\$99.99 and up), and consider hard paywalls.
- 2. Optimize early engagement for low-RPI apps** – Gaming, Social, and Media apps need strong retention strategies before monetization.
- 3. Leverage in-app purchases and upsells** – Travel, Productivity, and Utility apps can benefit from freemium models with premium features.
- 4. Improve first-week monetization in Shopping** – Encourage early purchases with limited-time discounts or personalized offers.
- 5. A/B test onboarding and paywalls** – Apps with high P90 values show some users will pay a lot early – test pricing models to maximize revenue.

By focusing on **early user behavior** and **category-specific strategies**, developers can boost revenue and optimize their monetization approach.

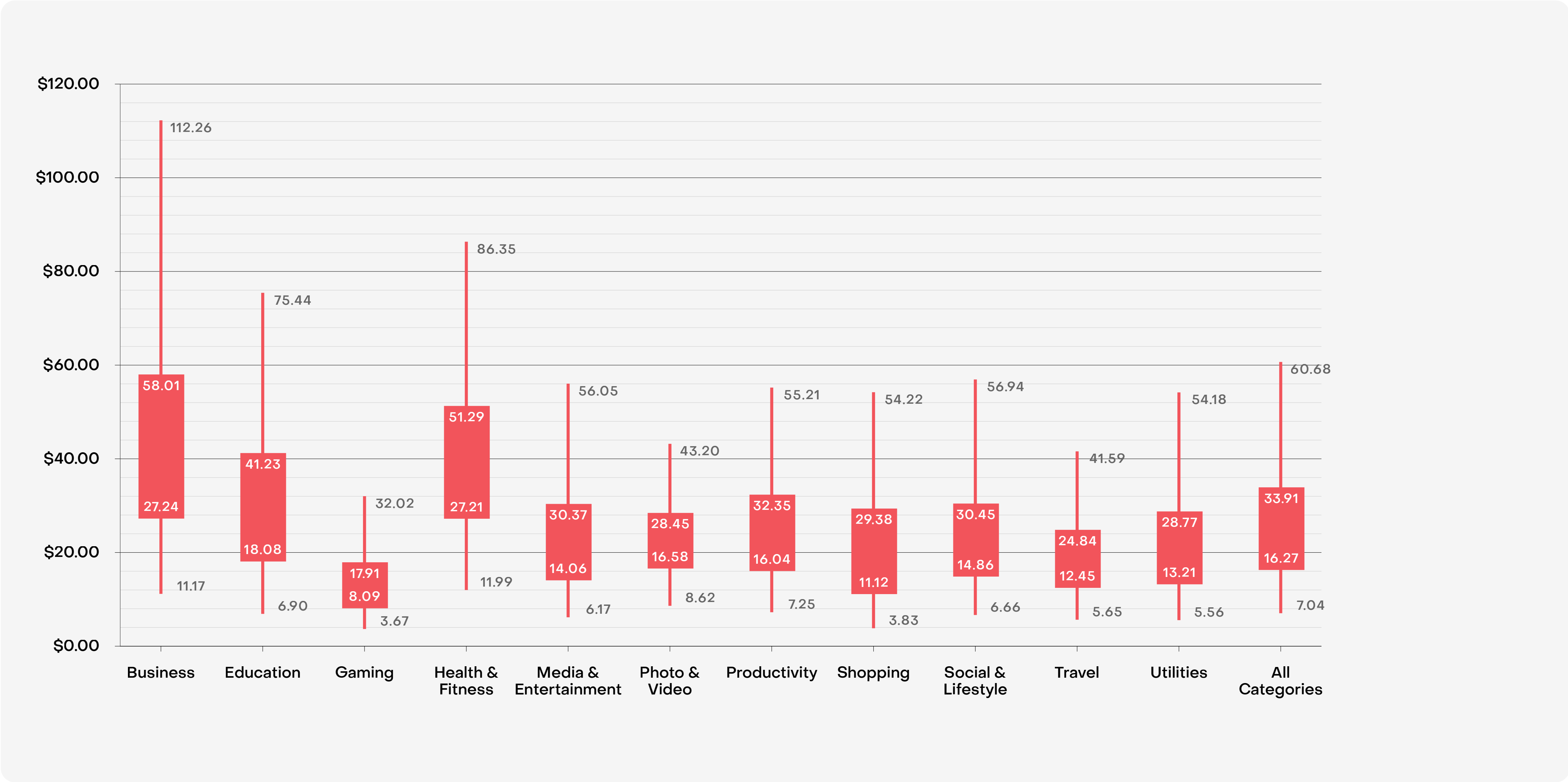
Realized LTV per Payer After 1 Month, By Category

Health & Fitness apps lead in payer LTV, with median (\$16.44) and upper quartile (\$31.12) values exceeding all other categories. Business apps show a large gap between median (\$14.82) and P90 (\$52.41), suggesting strong monetization potential for top performers.



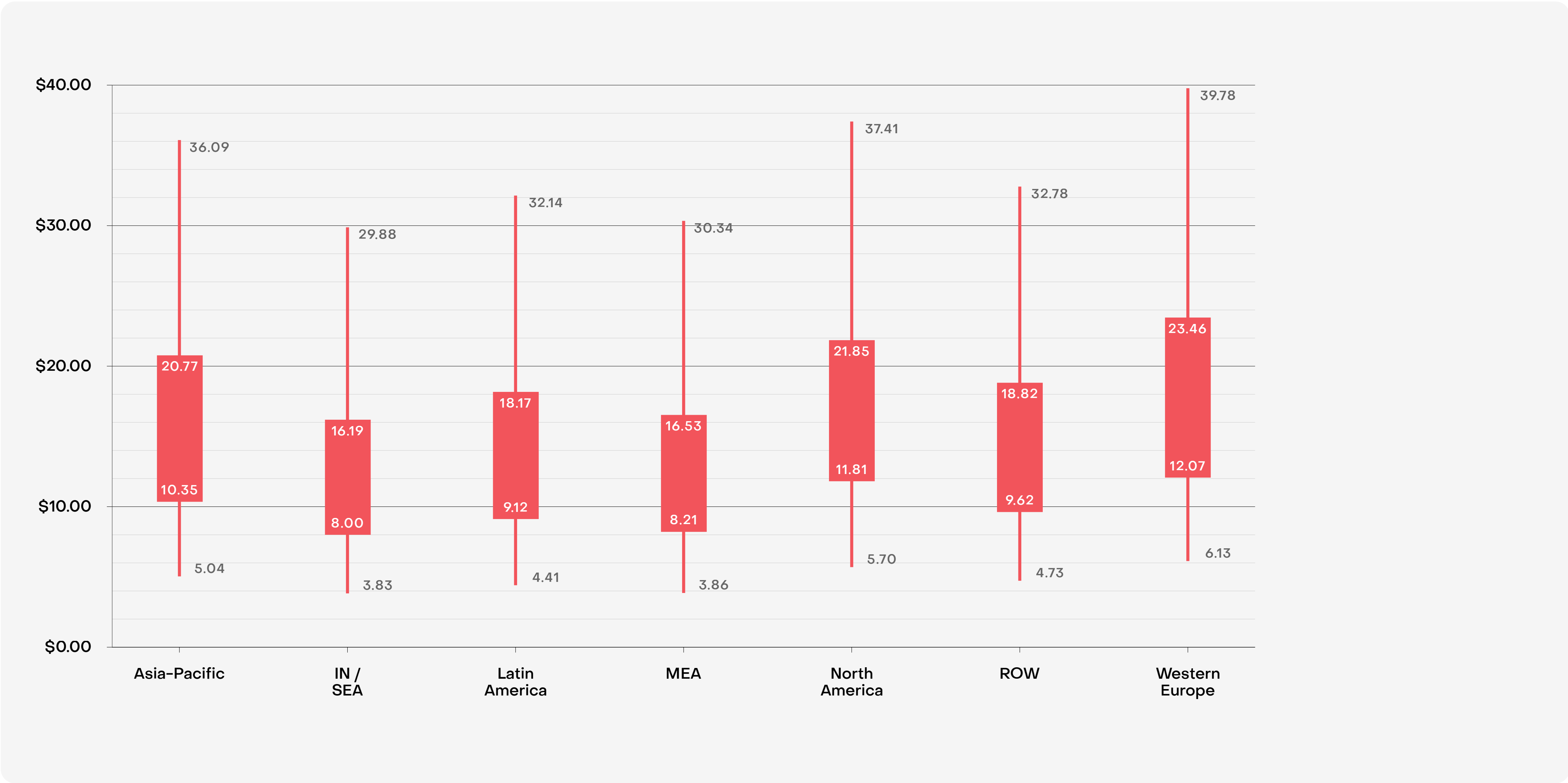
Realized LTV per Payer After 1 Year, By Category

Across all categories, LTV rises by nearly 60% month 1 to year 1. Shopping and Travel apps show some of the largest percentage increases in upper quartile LTV from month 1 to year 1, suggesting strong long-term spending from engaged users despite lower initial revenue per payer.

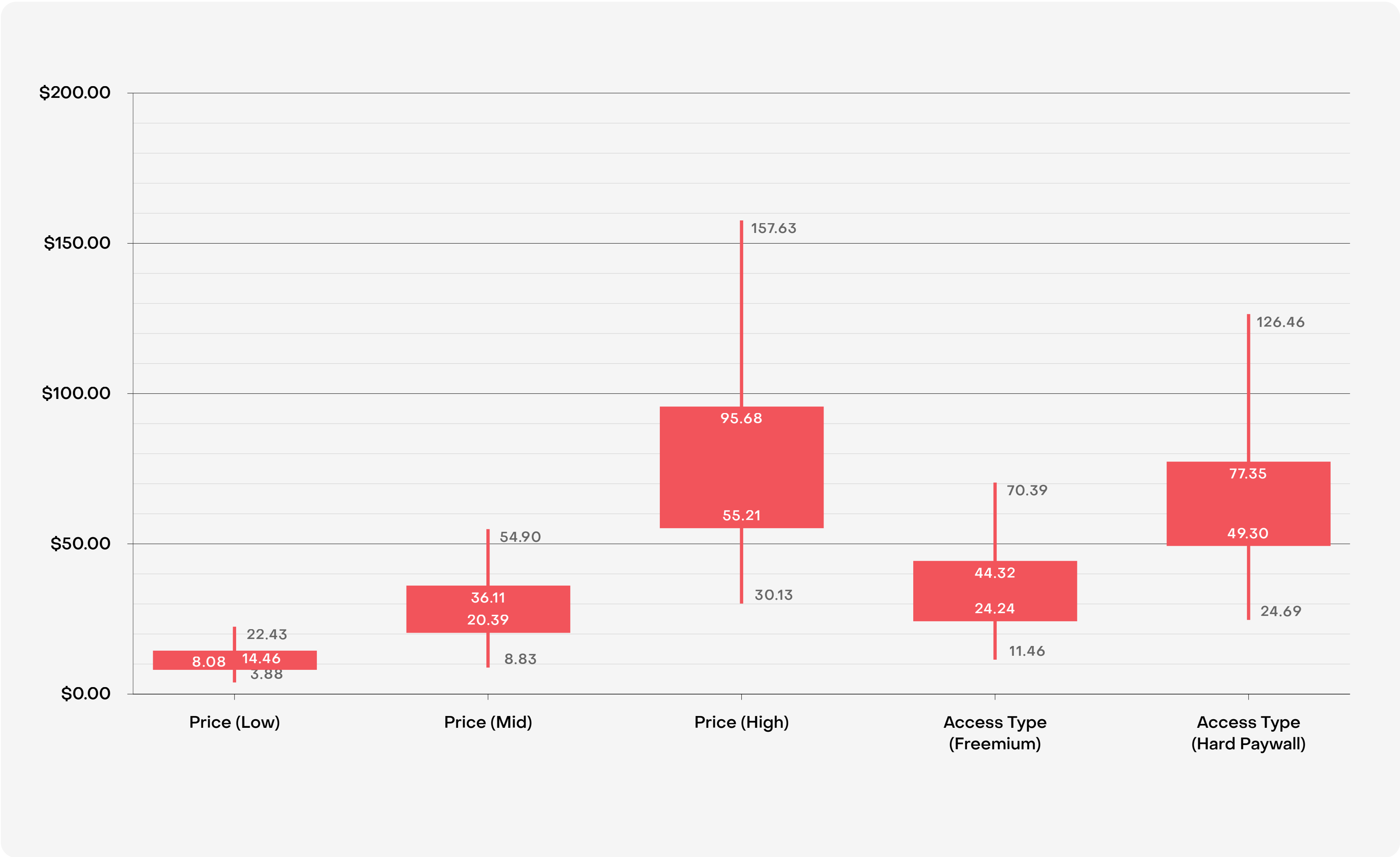


Realized LTV per Payer After 1 Year, By Geography

Western Europe and North America lead in LTV, with median values and P90 values exceeding all other regions. LTV more than triples from median to P90 across all regions.



Realized LTV per Payer After 1 Year, By Access Method or Pricepoint



- Higher prices lead to significantly higher LTV, with high-priced apps generating nearly 7x the median LTV (\$55.21) compared to low-priced apps (\$8.08), showing that premium pricing captures more long-term value per payer
- Lower-priced apps struggle with long-term monetization, with a P90 of just \$22.43, showing that even top-performing low-cost apps fail to match the revenue potential of mid- and high-priced apps
- The gap between upper quartile and P90 is largest in high-priced and hard paywall apps, suggesting that a subset of apps in these categories drive exceptionally high long-term value per payer

Rethink your pricing and paywalls to boost Year 1 Realized LTV

First: Higher prices still mean higher Year 1 Realized LTV. If you haven't tested pricing in the last 6–9 months, it's time to run new experiments!

- Make sure you understand the kind of noise to expect (e.g., run an A/A test first).
- **Do not** judge results based on short-term Realized LTV per customer. Anything that isn't a clear-cut win (e.g., 5–10 points above the A/A “noise”) might flatten out or even become a loss after Year 1 renewals (and the refunds that come with it).
- If you make an early call for cash flow reasons, revisit results often.

Next, should you have a hard paywall? As Thomas Petit puts it, mobile growth is a business model competition — and the D60 and Year 1 Realized LTV for hard paywalls are pretty compelling. There are many factors to consider, but if you're early-stage, really need the cash flow, and/or don't have a clear freemium strategy, then it might be time to prioritize testing a hard paywall.

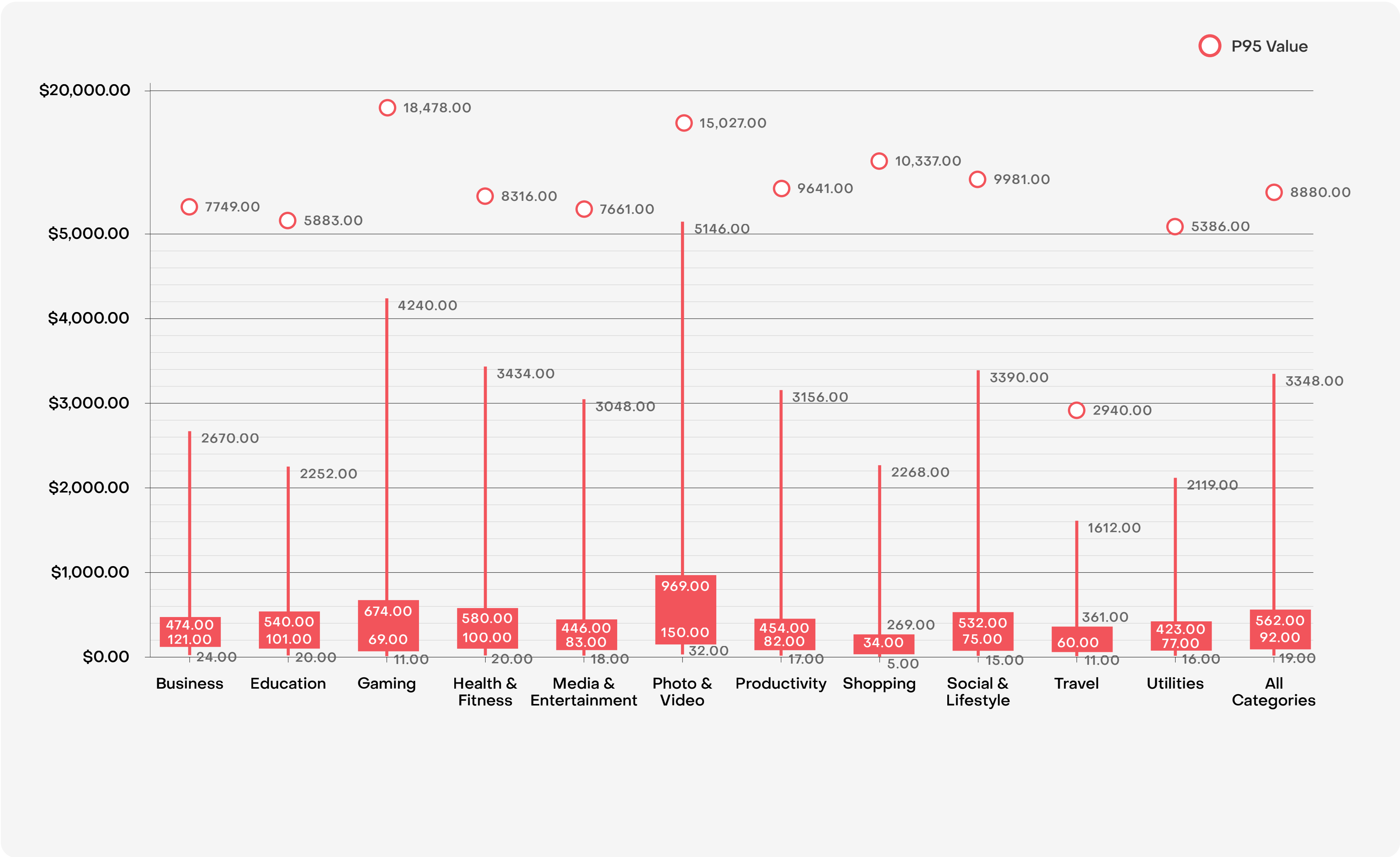
Finally, it's worth looking at top apps in the Business category, as they by far lead the pack in Year 1 Realized LTV.



Sylvain Gauchet

Head of Growth at Reading.com and
Chief Insights Miner at GrowthGems.co

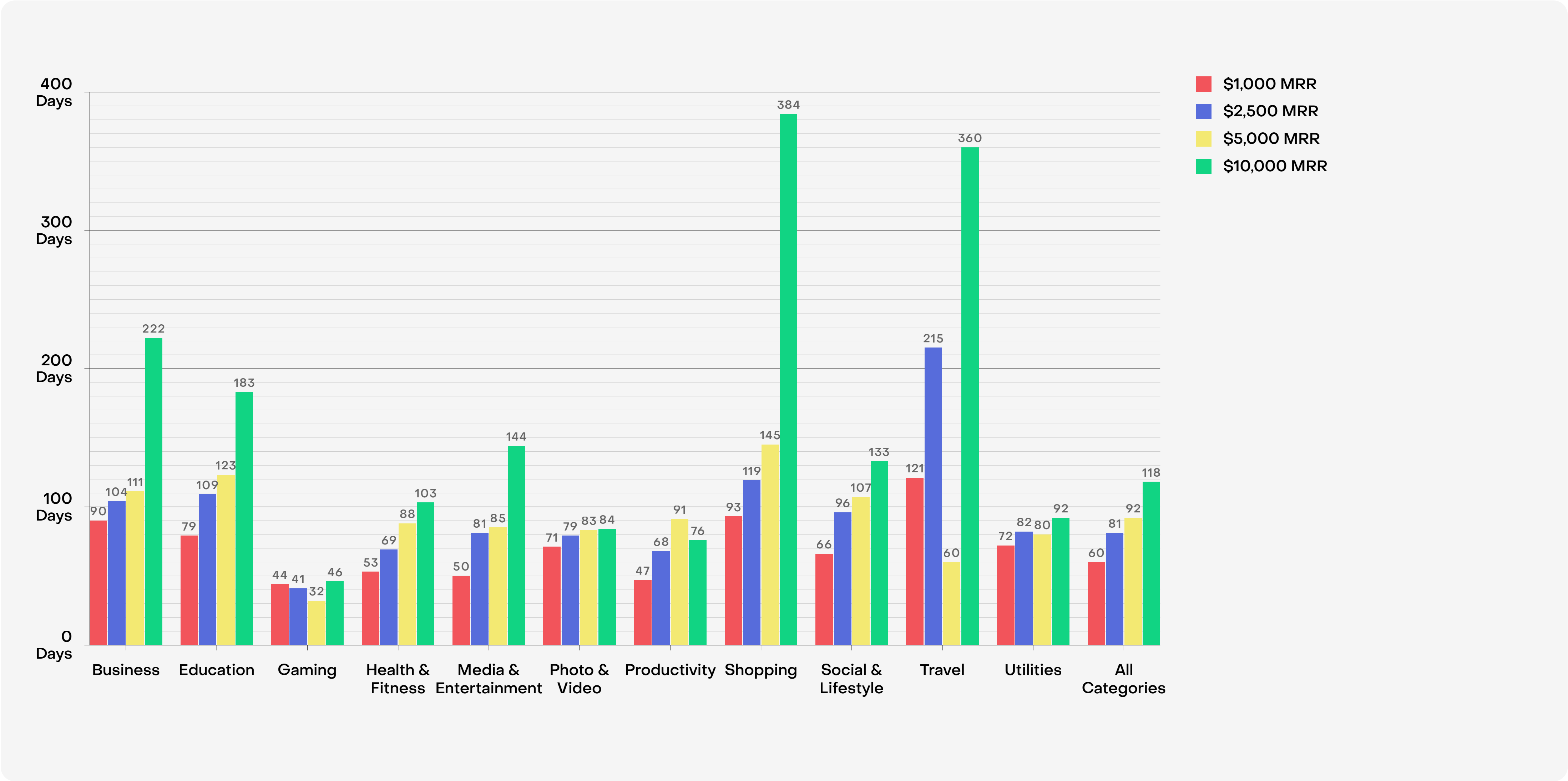
Monthly Revenue, 1 Year After Launch, By Category



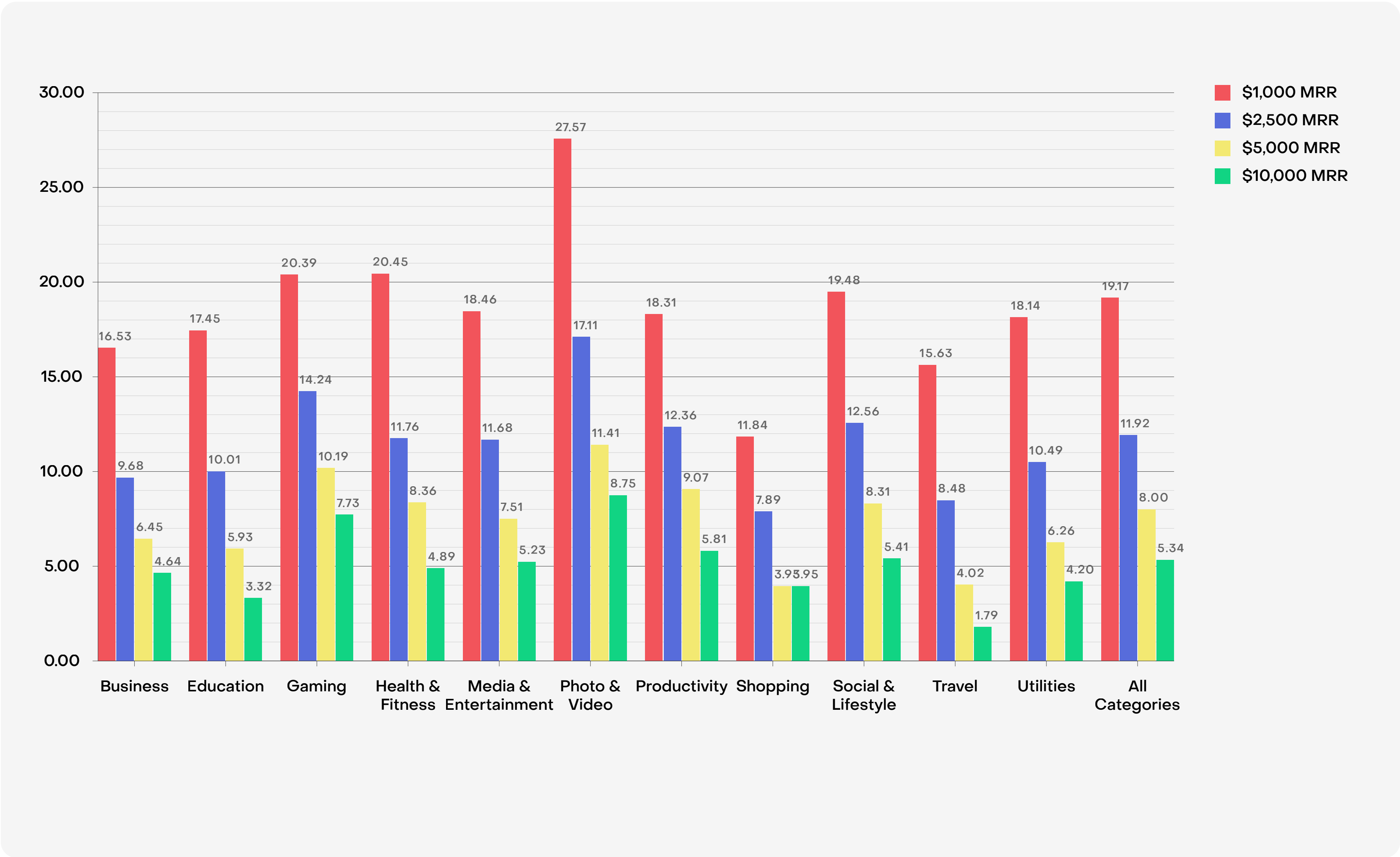
- Photo & Video and Gaming apps show the highest top-end revenue, with P95 reaching \$15,027 and \$18,478, respectively, offering strong breakout potential for top-performing apps.
- Shopping apps have the lowest median revenue (\$34) but a high P95 (\$10,337), suggesting that while most struggle, a few achieve exceptional scale and profitability

Median Number of Days from Launch to Revenue Milestones

For the apps that make it there, the median number of days to reach \$1,000 is 60. Health & Fitness, Photo & Video, and Utilities apps show some of the most consistent growth to later milestones beyond that mark.



Share of Newly Launched Apps that Hit Revenue Milestones in Their First 2 Years



- Photo & Video are enjoying a good run and have the highest success rates, with 27.57% reaching \$1,000 and 8.75% hitting \$10,000 within 2 years, suggesting strong early monetization potential compared to other categories
- Across all categories, nearly 20% reach \$1,000 in revenue while 5% reach the \$10,000 mark. Revenue drop-off is steep, with many categories losing ~50% of apps at each milestone, emphasizing the challenge of sustained growth beyond early revenue benchmarks

Turn insights into action with a SOSA Workshop

The 2025 State of Subscription Apps Report delivers powerful industry benchmarks – but how do you apply them to your app?

Our carefully selected agency partners and growth experts are ready to deliver personalized workshops based on the 2025 report, helping you turn data into actionable strategies for growth.

What to expect

- A tailored deep dive into key SOSA insights for your industry
- Hands-on benchmarking for your app
- Actionable strategies to optimize acquisition, conversion, retention and revenue

Get started

Connect directly with one of our agency partners or contact partnerships@revenuecat.com for more info



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Can Support clients in: Europe, North America, MEA



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Can support clients in: North America, Europe, APAC, MEA



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Data-driven mobile marketing experts committed to driving sustainable growth for Mobile Apps, whether it's a new launch or an established app aiming for local or international expansion.

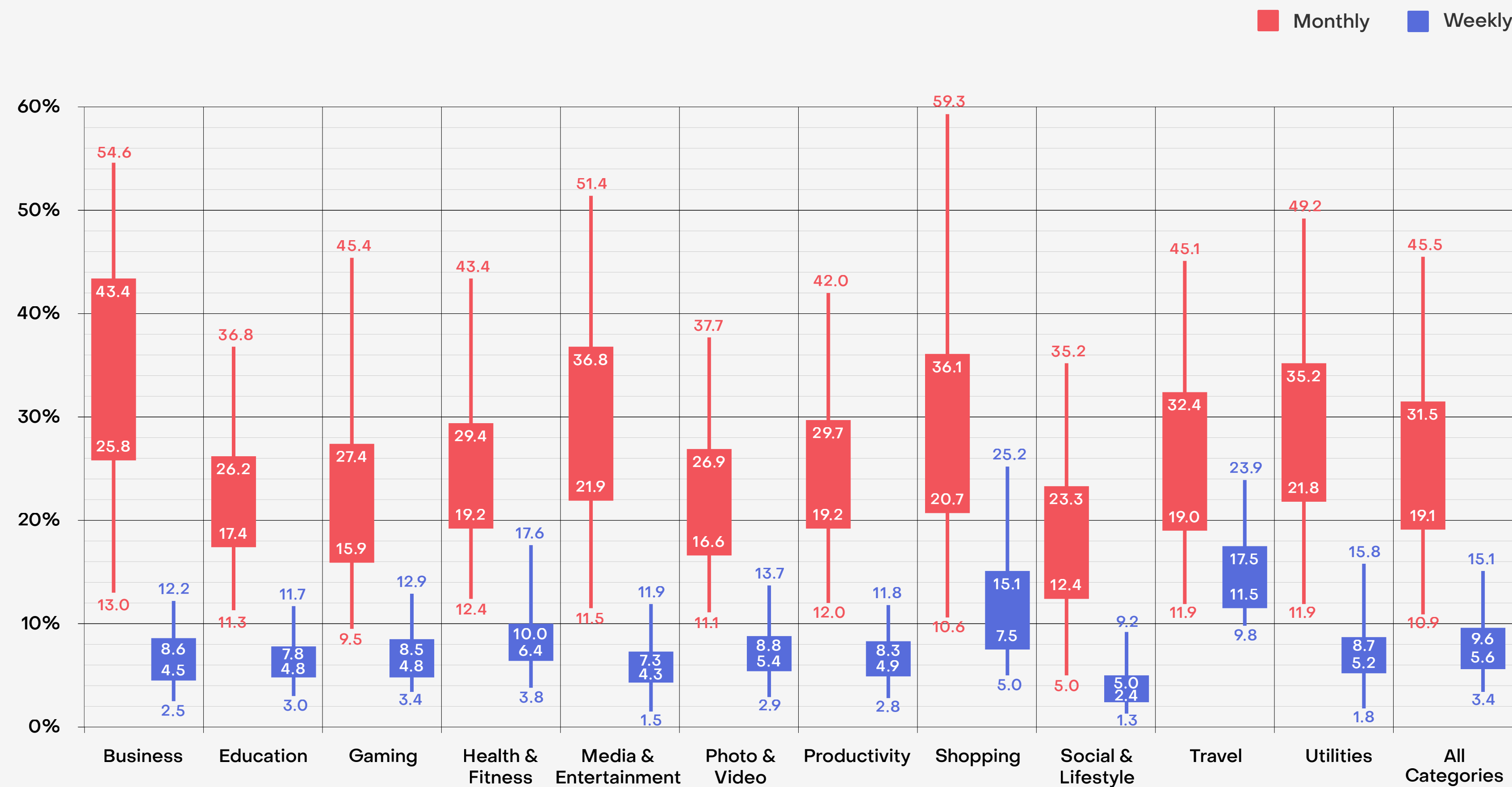
HQ: Paris, France
Can support clients in: Europe, North America, MEA

Retention & Reactivation

04

Retention of Weekly & Monthly Plans 6 Months in, By Category

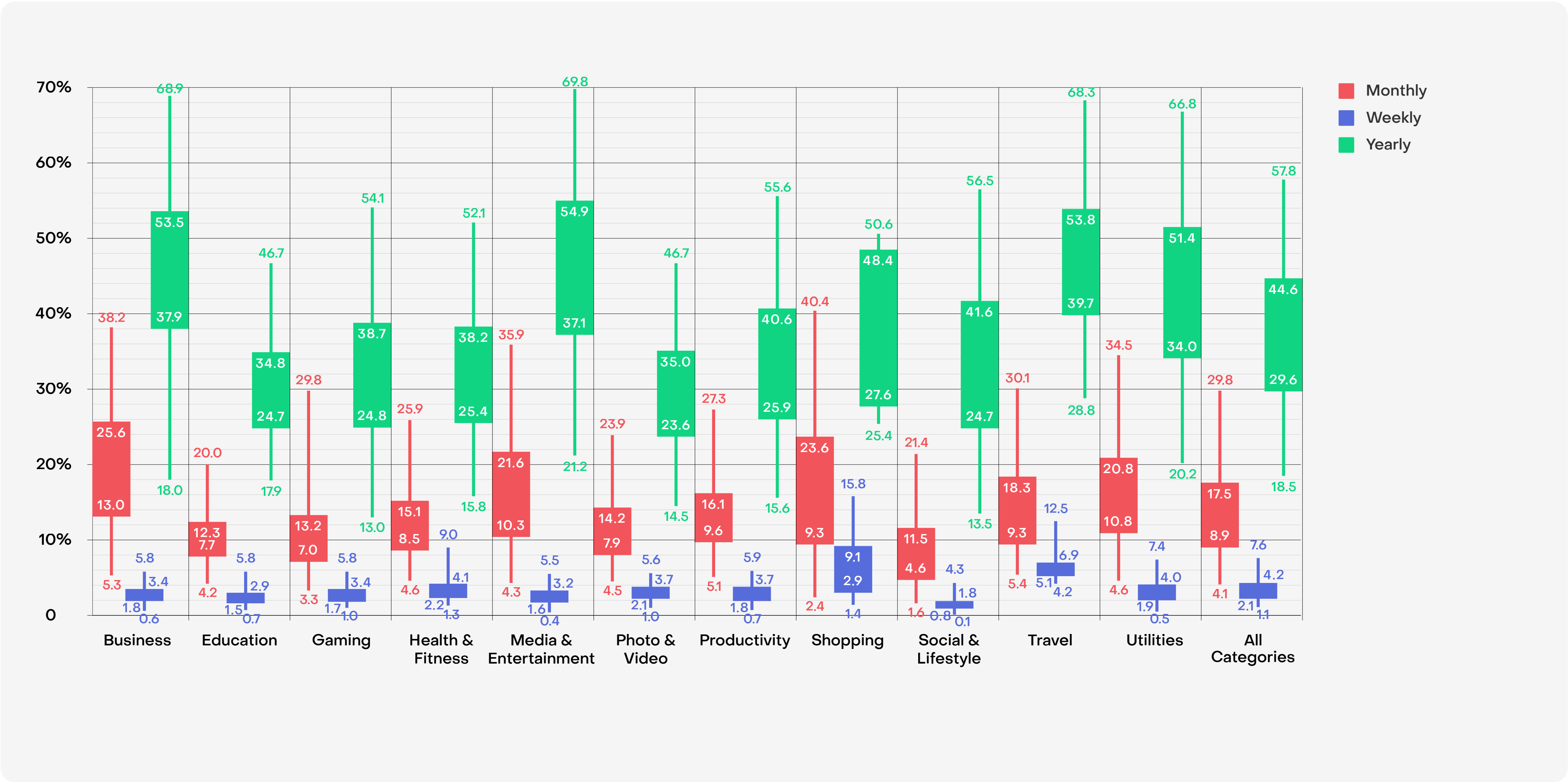
! This chart shows the bottom quartile, median, upper quartile, and top 10% of performance, in order, from the bottom up



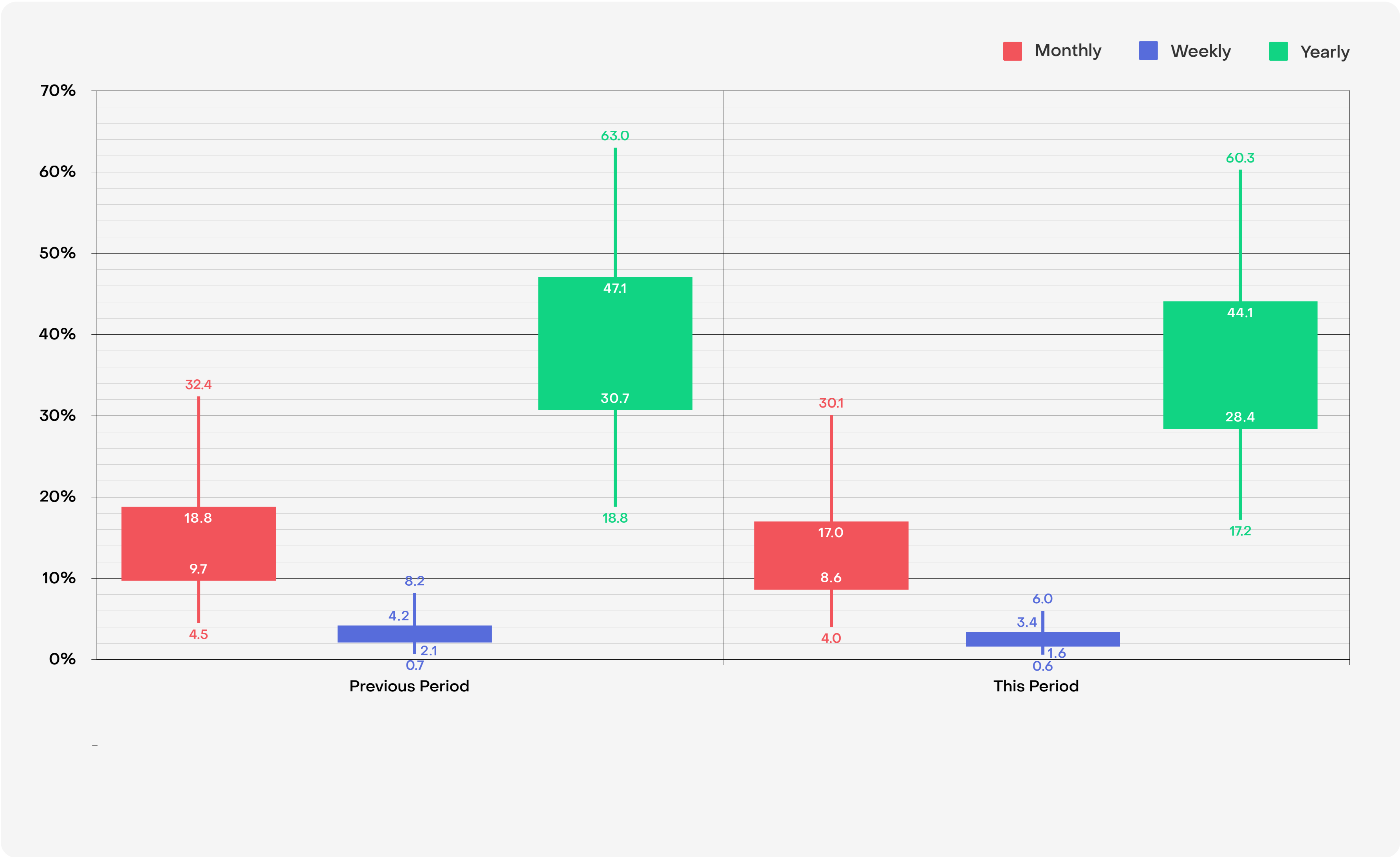
- Retention varies widely by category. Media & Entertainment, Travel, and Shopping see some of the highest monthly plan retention rates, while categories like Gaming and Social & Lifestyle show notably lower retention across both plan types
- Weekly plan retention is uniformly low. Across all categories, weekly plan retention rarely exceeds 10% at six months, with many categories seeing retention below 5%, highlighting the challenge of retaining short-term subscribers
- Social & Lifestyle apps struggle with long-term retention. This category shows the lowest retention rates for both weekly and monthly plans, indicating high churn and potential challenges in sustaining user engagement beyond the initial subscription period

Retained Subscribers After 1 Year, By Plan Duration

Yearly plans significantly outperform monthly and weekly plans in 12-month retention across all categories, with some exceeding 50–60% retention, compared to 20–40% for monthly and under 10% for weekly.

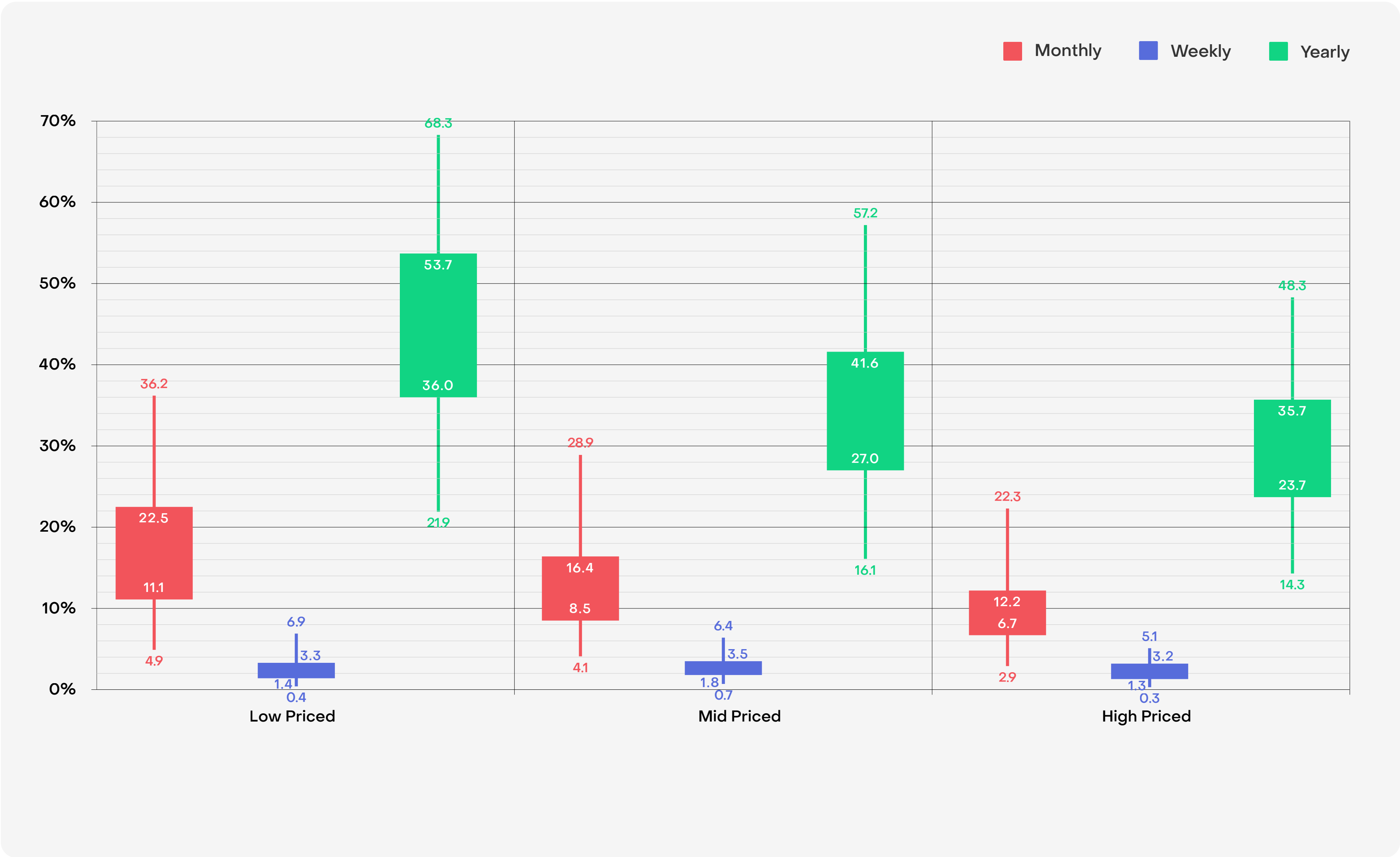


Year 1 Retention Compared to the Previous Period, By Plan Duration



- Yearly plans maintain the highest retention rates, but retention has slightly declined from 47.1% in the previous period to 44.1% in this period. Despite this drop, annual subscribers still outperform other plan durations by a wide margin
- Monthly plan retention decreased from 18.8% to 17.0%, suggesting potential churn challenges or shifts in user engagement. This could indicate either pricing adjustments, product experience changes, or evolving user behavior
- Weekly plan retention remains the lowest, declining from 4.2% to 3.4%, reinforcing the idea that weekly subscriptions serve as short-term trials rather than long-term commitments. This underscores the importance of upselling weekly subscribers to longer-term plans

Retained Subscribers After 1 Year, By Pricepoint



- Yearly plans have the highest retention across all price points, with low-priced plans retaining up to 53.7% of users and high-priced plans still maintaining 48.3% retention. This suggests that users committing to annual plans tend to stay engaged regardless of price
- Monthly retention decreases as price increases, with 22.5% retention for low-priced plans, 16.4% for mid-priced, and only 12.2% for high-priced. This indicates that higher-cost monthly subscriptions may face stronger churn pressures
- Weekly plans consistently underperform across all price points, with retention hovering around 3-6%. This reinforces the idea that weekly subscriptions function primarily as short-term trials rather than sustainable retention drivers

Retained Subscribers After 1 Year, By Access Method



- Freemium access leads to higher yearly plan retention variability, ranging from 18.7% to 59.0%. This suggests that different app categories or acquisition strategies may significantly impact long-term retention under the freemium model
- Weekly plans show the lowest 12-month retention across both access methods, with median rates under 6.5%. This reinforces the trend that short-term plans often struggle to convert users into long-term subscribers
- Monthly retention under a hard paywall outperforms freemium, with a median of 12.8% versus 9.3%. This suggests that users who commit to a paid experience upfront may be more engaged than those entering through a free tier

“Retention is hard”



Thomas Petit
Independent app growth consultant

Only a small percentage of users pay for subscriptions, so you’d think the most committed ones would stick around. And yet, churn hits hard: on monthly plans, barely 10% of payers reach the second year. On weekly plans, less than 5% make it to month 6!

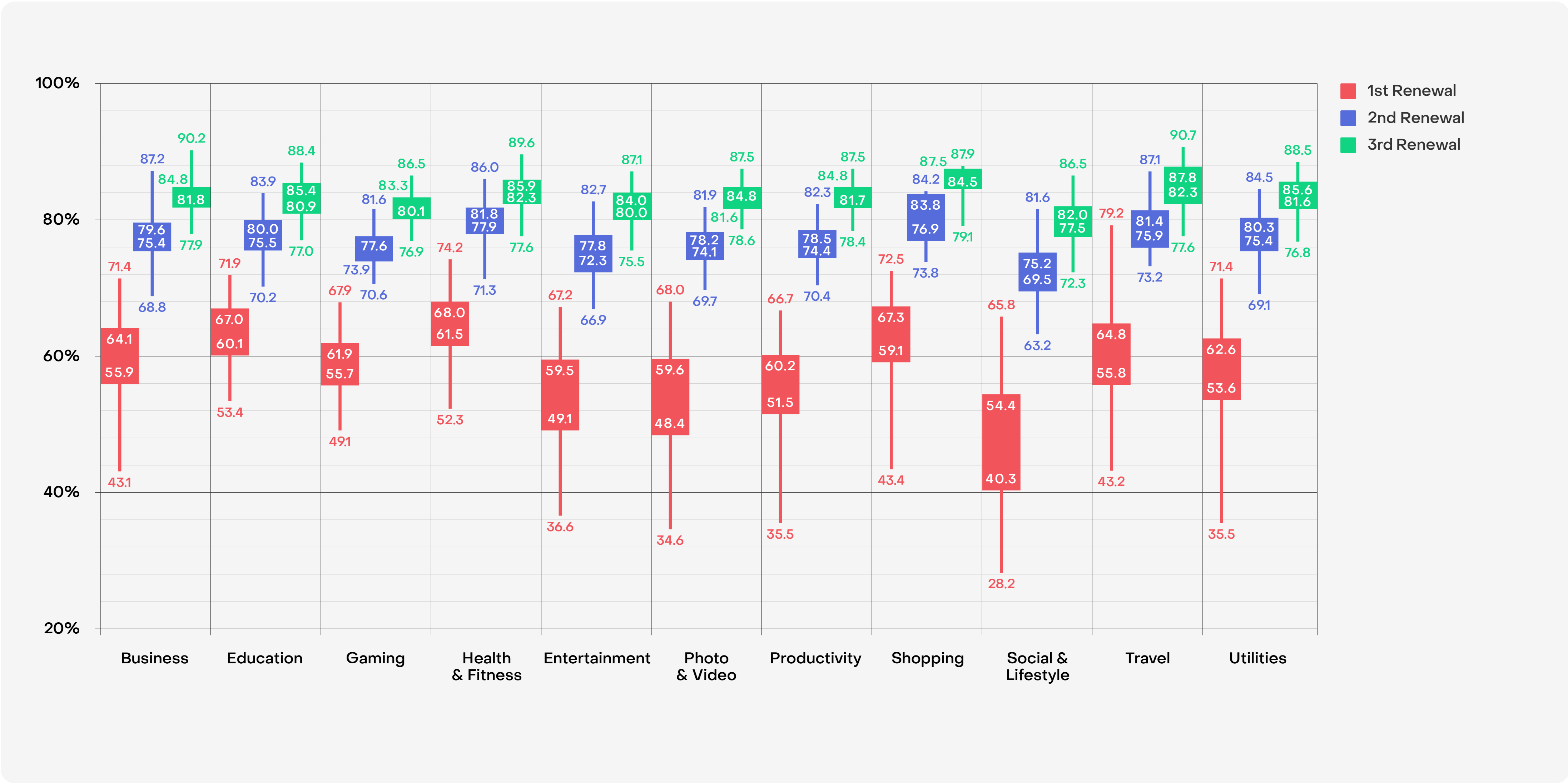
There is hope: **the best defy those odds.** This is especially true in Travel, Shopping, Media, and Business categories. “Never tell me the odds,” said Han Solo. Instead, use this benchmark to aim for the very top: the upper quartile retain 60–75% on yearly plans – twice the median!

Cherrypicks from RevenueCat’s data trove & potential actions:

- The first renewal has the biggest impact, with 30–50% churn on weekly plans and 15–40% on monthly.
 - *It’s usually easier to prevent than cure. Analyze what active retainers did early on that others didn’t, and surface this value to more users.*
- North America often shows higher conversion rates, but Europe & Asia-Pacific retain as much.
 - *Always consider the full revenue picture.*
- Shorter plans have much lower Year One renewals, and weekly plans show the steepest decline YoY (–27%!).
 - *Annual subscriptions can help pay back high acquisition costs faster but also yield longer-term benefits.*
- 2 to 5% of payers will claim a refund (more in Health & Fitness and Education).
 - *Monitor closely and use RevenueCat’s new feature to reduce refunds significantly.*
- Renewal rates show extreme variance by duration (weekly the hardest), price point (higher price correlates with lower renewal), regions, and more. Average Y1 retention is up overall despite being down on all individual segments.
 - *Segment to isolate your best and worst performers, shift the combination, and avoid the trap of averages.*

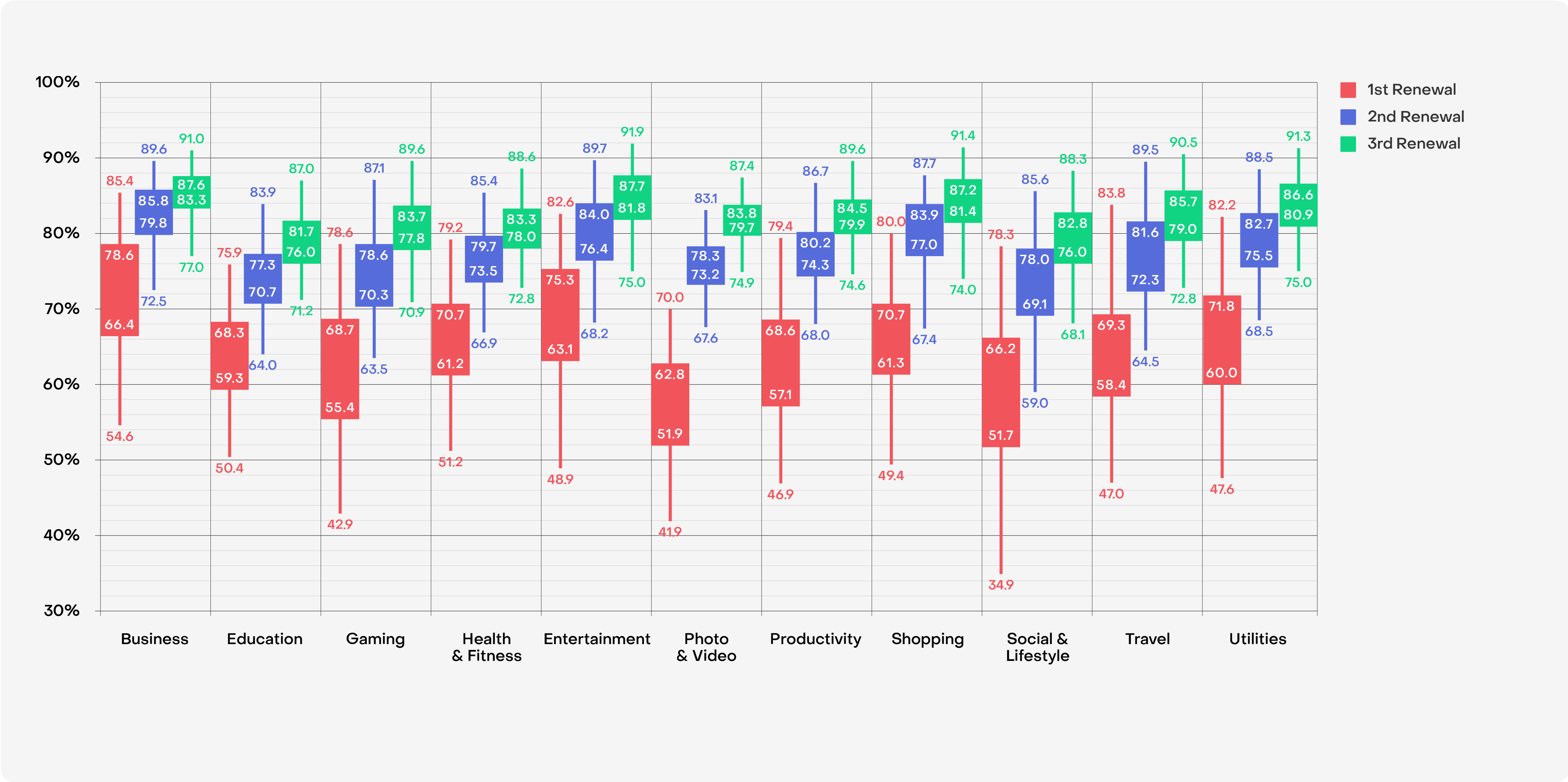
First 3 Weekly Subscription Renewals, By Category

Weekly plans exhibit the lowest retention, with some categories like Social & Lifestyle and Lifestyle and Entertainment dropping below 50% by the third renewal. This suggests weekly subscriptions may function more as short-term trials rather than long-term revenue drivers.



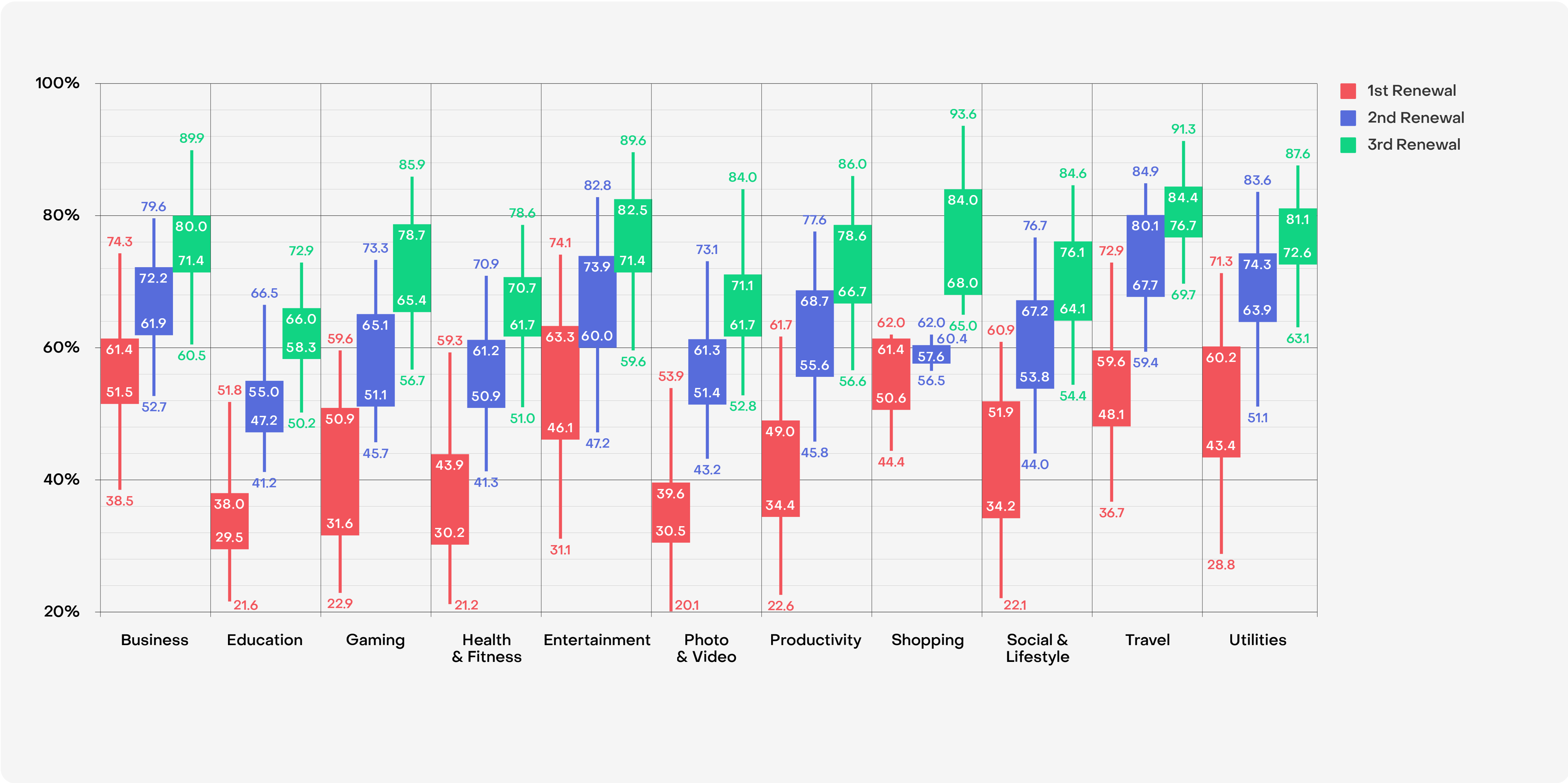
First 3 Monthly Subscription Renewals, By Category

Gaming and Social & Lifestyle show the most variability, with some apps retaining well over 75% of subscribers while others drop closer to 50%. This signals that app-specific factors heavily influence user retention in these segments.

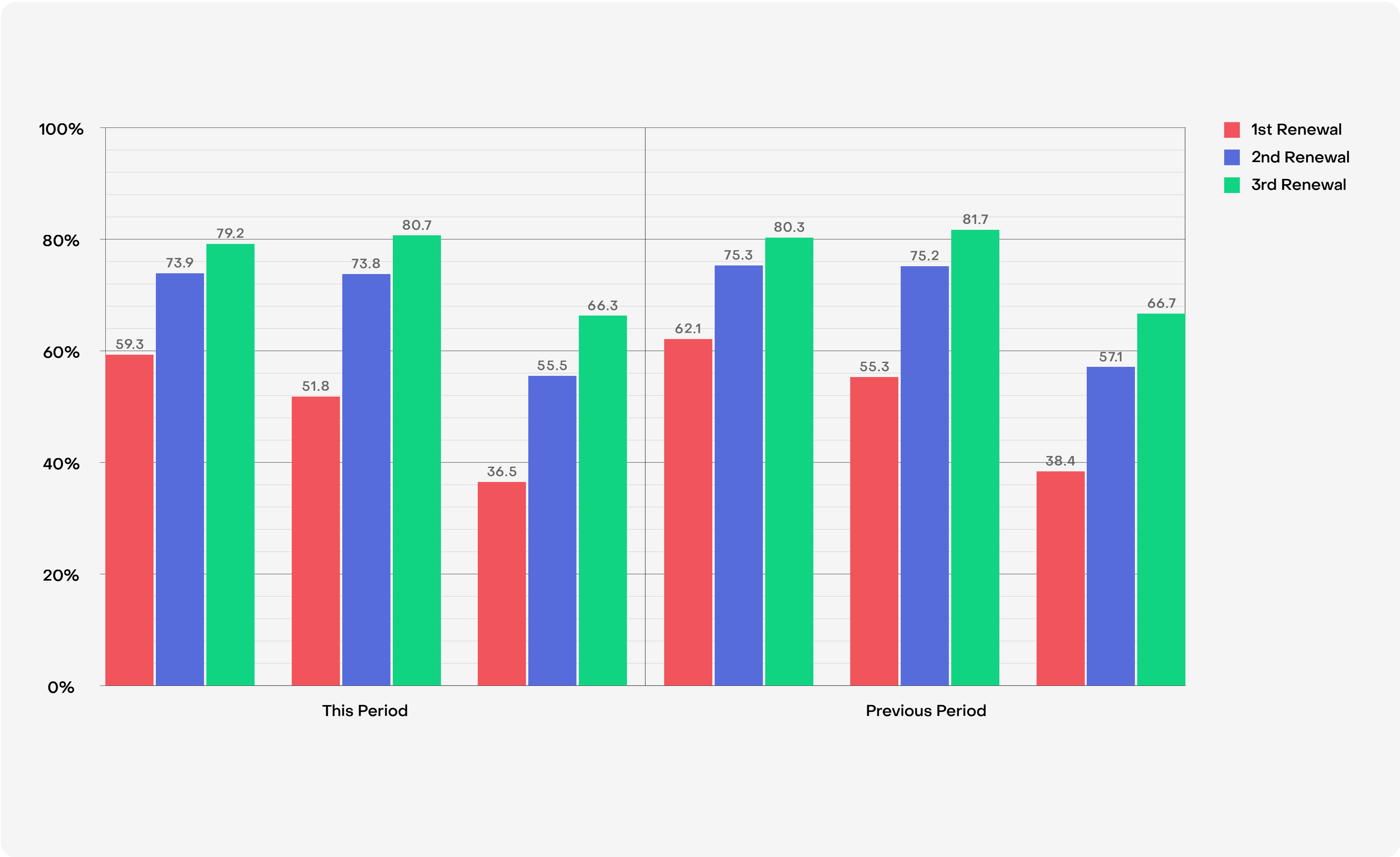


First 2 Annual Subscription Renewals, By Category

Annual renewals show the highest long-term retention, exceeding 85% in several categories. Business and Utilities lead in user commitment, suggesting these verticals provide ongoing value that justifies yearly renewals.



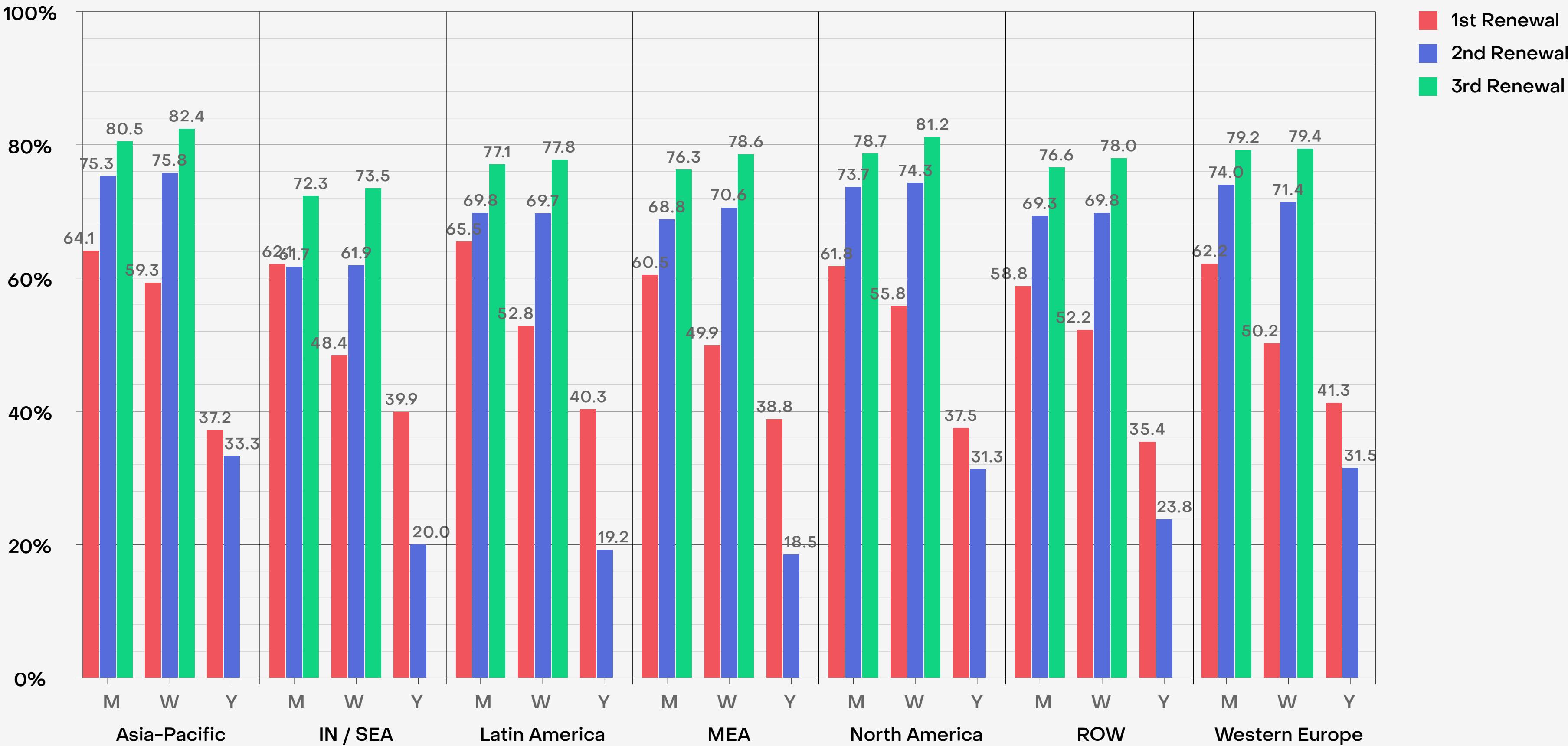
Median Renewal Rates, By Subscription Duration, Compared to the Previous Period



- This period saw slightly lower first and second renewal rates compared to the previous period, particularly in the first renewal (61.7% vs. 64.9%). This could indicate shifts in user behavior, pricing strategies, or acquisition sources
- Third renewal rates remain strong across both periods, exceeding 77% in both cases. This suggests that once users commit beyond two renewals, they are significantly more likely to remain subscribers
- The drop in first-to-second renewal rates is more pronounced in this period, with a sharper decline from 61.7% to 53.4%. This could indicate retention challenges early in the subscription lifecycle

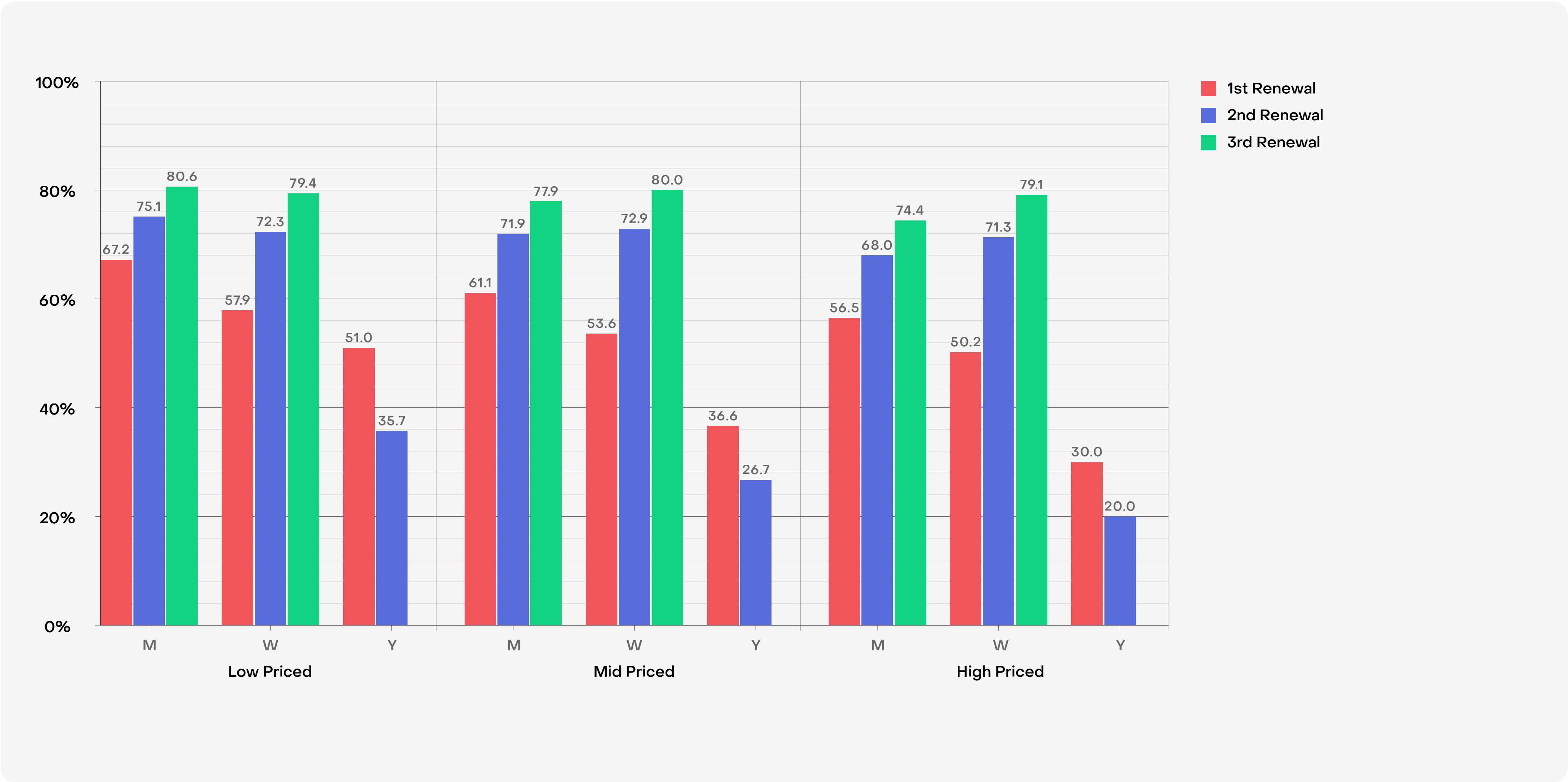
Median Subscription Renewal Rates, By Geography

North America and Western Europe lead in retention, with third renewal rates exceeding 79%, suggesting strong long-term engagement in these markets.

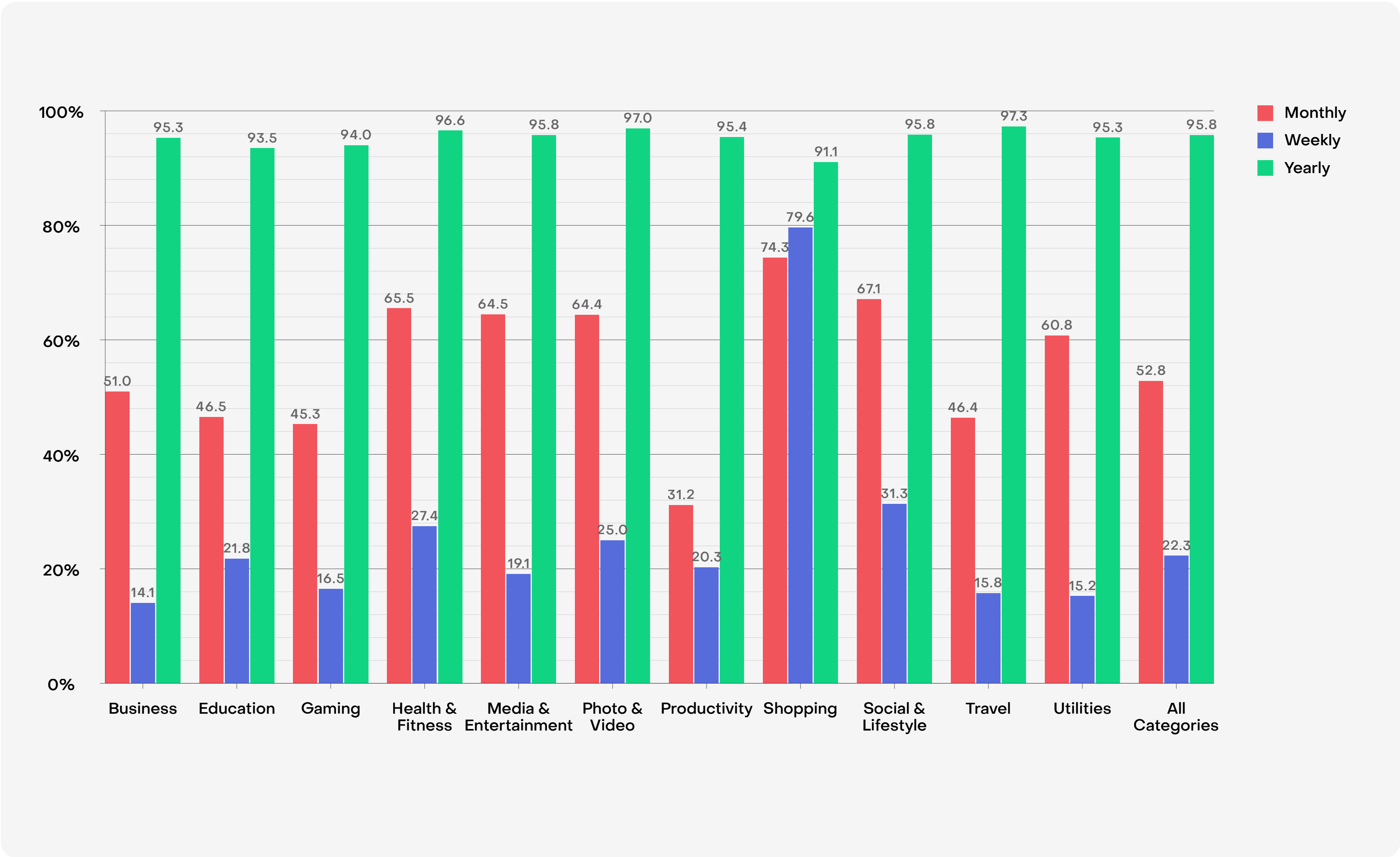


Median Subscription Renewal Rates, By Pricepoint

Low-priced subscriptions retain best over time, with third renewal rates exceeding 79%, suggesting affordability drives sustained engagement.



Active Renewal Rate, By Category



- Weekly plans exhibit the lowest active renewal rates, often below 30%, highlighting that short-term subscribers are less likely to remain engaged between renewals. This suggests that weekly plans may function more as trial periods rather than ongoing commitments
- Shopping and Health & Fitness apps retain high engagement across renewal periods, with strong active renewal rates in both monthly and yearly plans. This suggests these categories effectively keep users engaged between billing cycles
- Gaming, travel, and utilities struggle with active renewal rates, particularly for shorter durations, indicating that users in these categories may be more transactional or less consistently engaged over time

How to re-engage churned users

Quizlet

Caroline Walthall
Quizlet



1 Deliver personalized value through lifecycle marketing

Reconnect with churned users by personalizing content and recommendations based on their past interactions. Use dynamic segmentation to tailor messages that highlight relevant new features or content. Making users feel understood increases the likelihood of re-engagement.

2 Use targeted discounts wisely

Offer personalized discounts to price-sensitive users, but do so strategically to avoid hurting long-term revenue. Consider tiered discounts based on subscription history or engagement level. Avoid blanket discounts to prevent users from gaming the system.

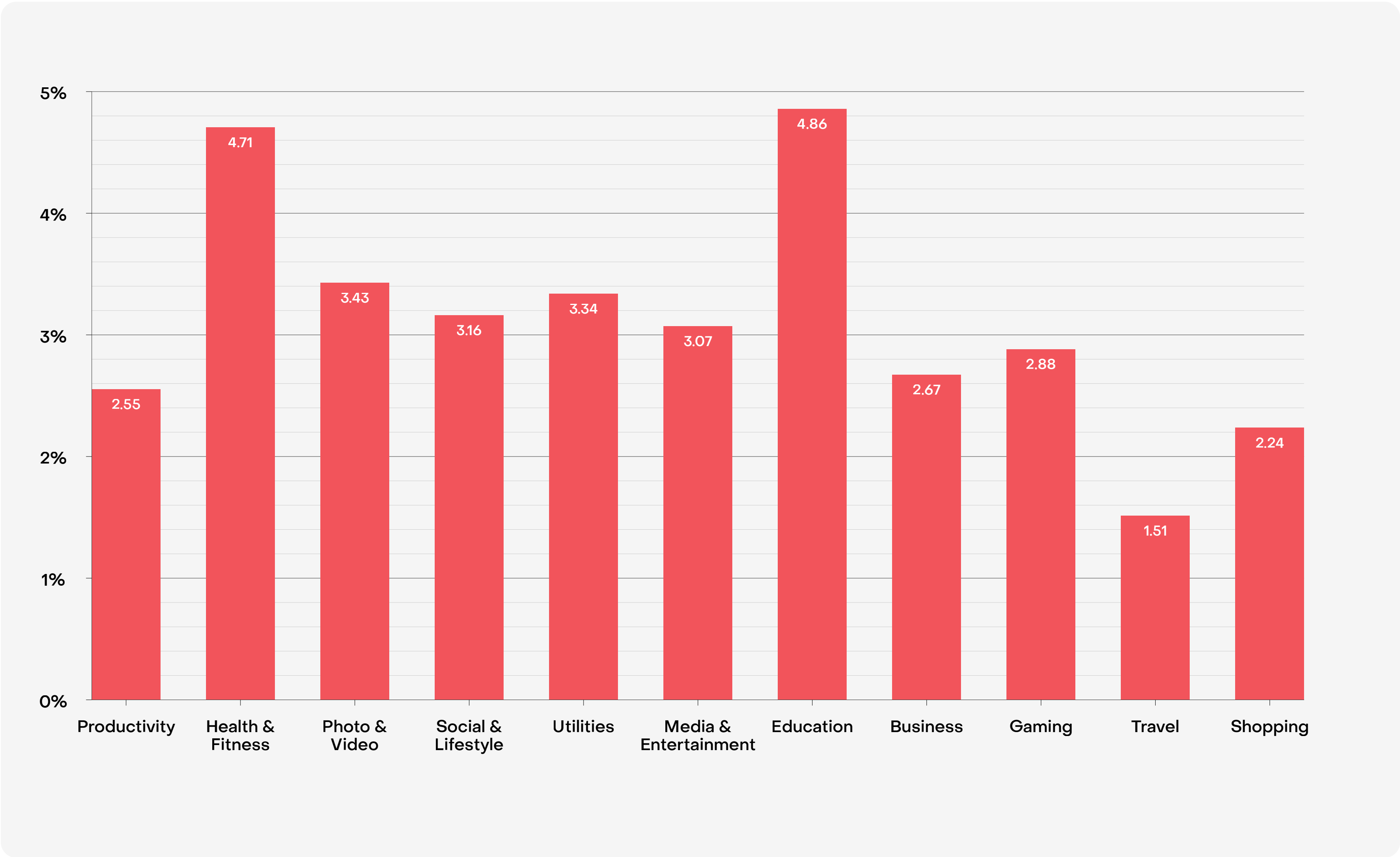
3 Provide flexible subscription options

Increase retention by offering flexible plans, such as shorter durations or the ability to pause subscriptions during off-seasons. This builds trust and reduces churn from users who only need the app occasionally. Flexibility makes users feel more in control and more likely to return.



Listen to Caroline's Minisode
(~15 min) on the Sub Club Podcast

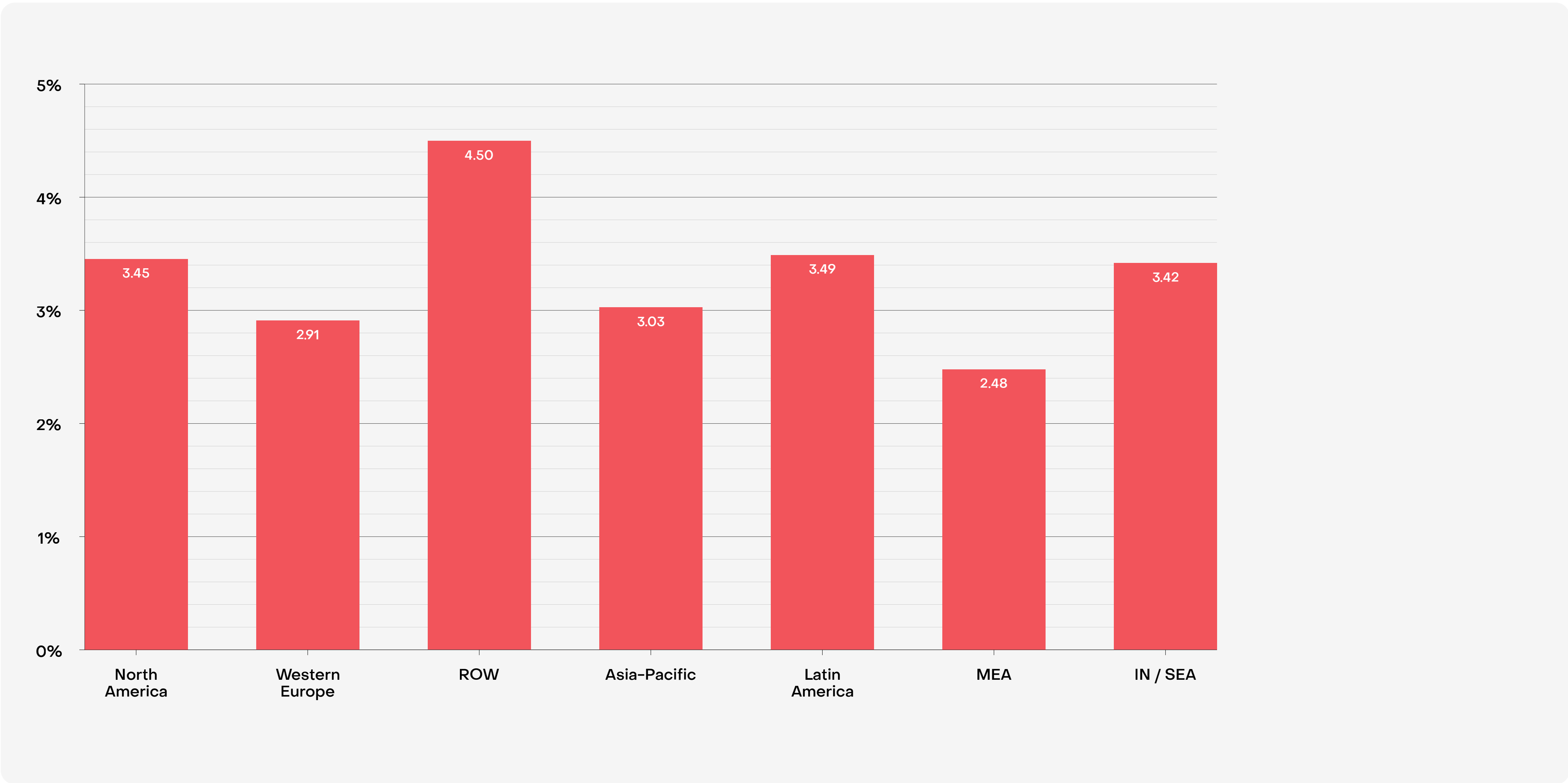
Refund Rate, By App Category



- Education and health & fitness apps have the highest refund rates, at 4.86% and 4.71% respectively. This suggests potential issues with user expectations, unclear pricing, or aggressive upselling
- Travel apps have the lowest refund rate (1.51%), likely due to higher purchase intent and the necessity-driven nature of subscriptions in this category
- Gaming and business apps see lower-than-average refunds (2.67–2.88%), suggesting users may better understand their value proposition before subscribing

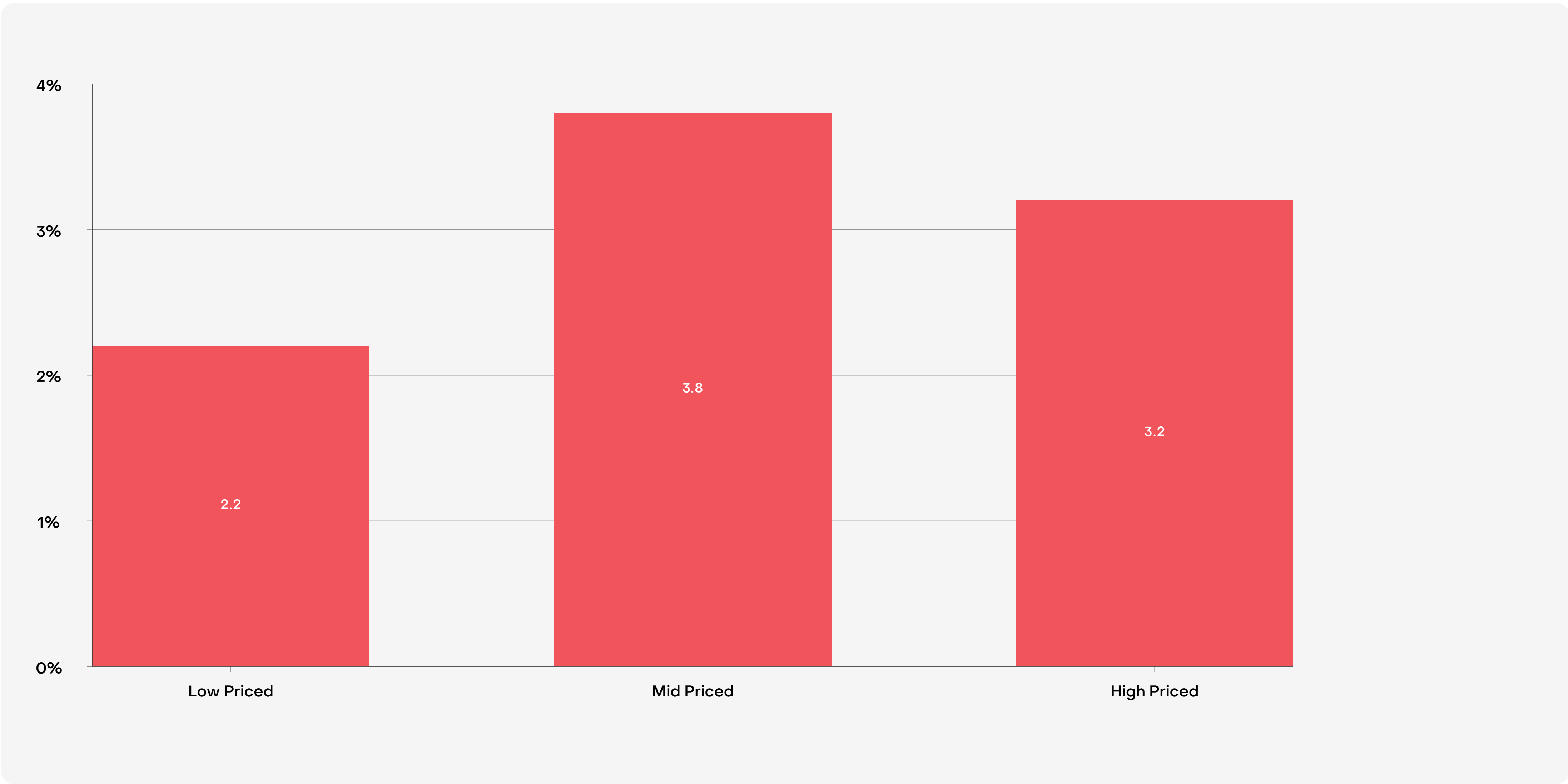
Refund Rate, By Geography

Western Europe and Asia-Pacific have relatively lower refund rates (below 3.0%), which may indicate stronger user trust, better subscription transparency, or more stable payment infrastructures.

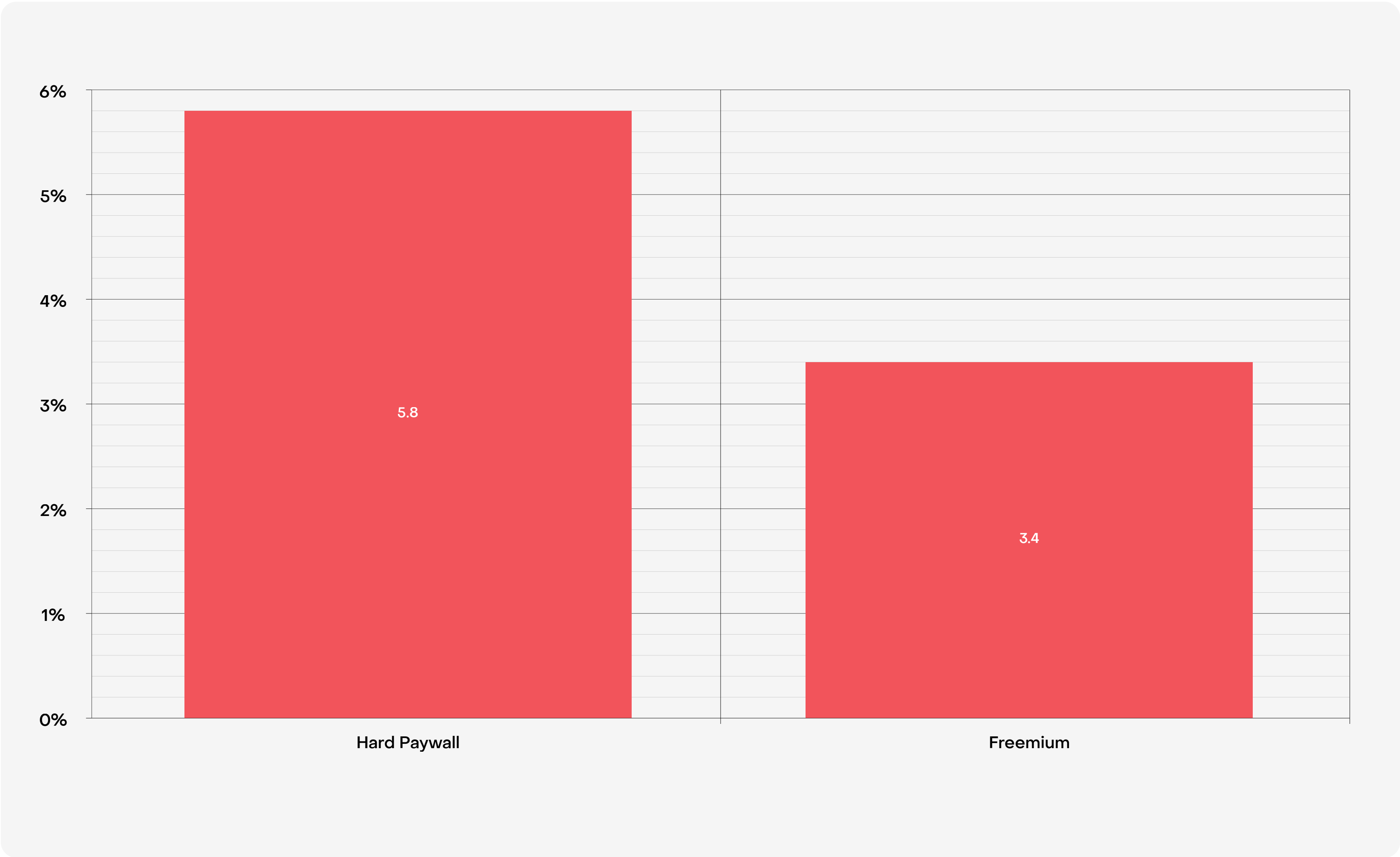


Refund Rate, By Pricepoint

Low-priced plans have the lowest refund rate (2.2%), reinforcing the idea that lower financial risk leads to fewer refund requests.



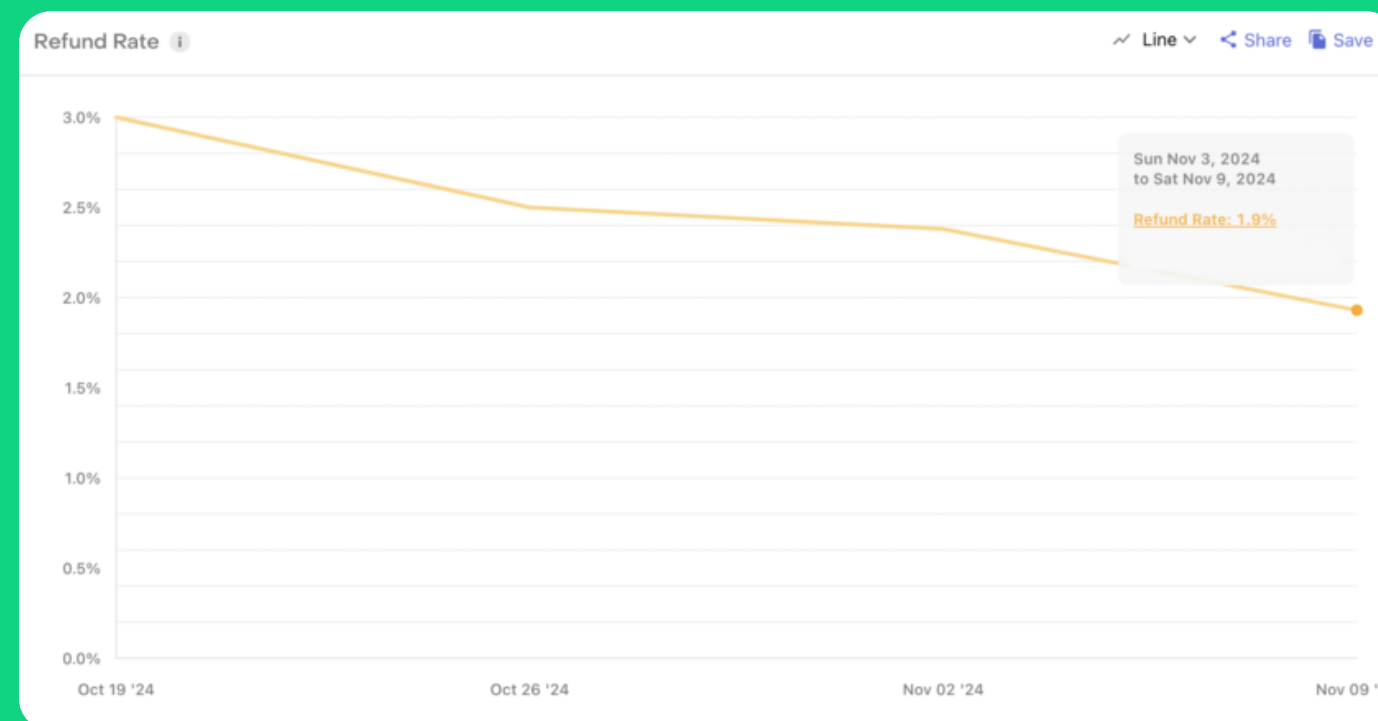
Refund Rate, By Access Method



- Hard paywall apps see significantly higher refund rates (5.8%) compared to freemium apps (3.4%). This suggests that users who are required to pay upfront may experience more dissatisfaction or unmet expectations
- The large refund gap between access methods highlights the importance of clear value communication. Hard paywall apps may benefit from enhanced onboarding, clearer pricing, or refund mitigation strategies
- Refund trends suggest that user expectations play a key role. If an app lacks trial opportunities, users may be more likely to request refunds after purchase

Reduce Refund Abuse, Keep More Revenue

Some categories see higher refund rates than others—but not because of product quality. Many users request refunds due to buyer's remorse, not technical issues. RevenueCat's Refund Handling helps you take control, providing Apple with key usage data to reduce unnecessary refunds and protect your revenue.



Why Refunds Are Higher in Certain Categories

In Health & Fitness and Education, refund rates are significantly higher than in other verticals. Not because these apps are broken—but because users lose motivation, rethink their purchase, and request a refund even after consuming content.

With RevenueCat, you can:

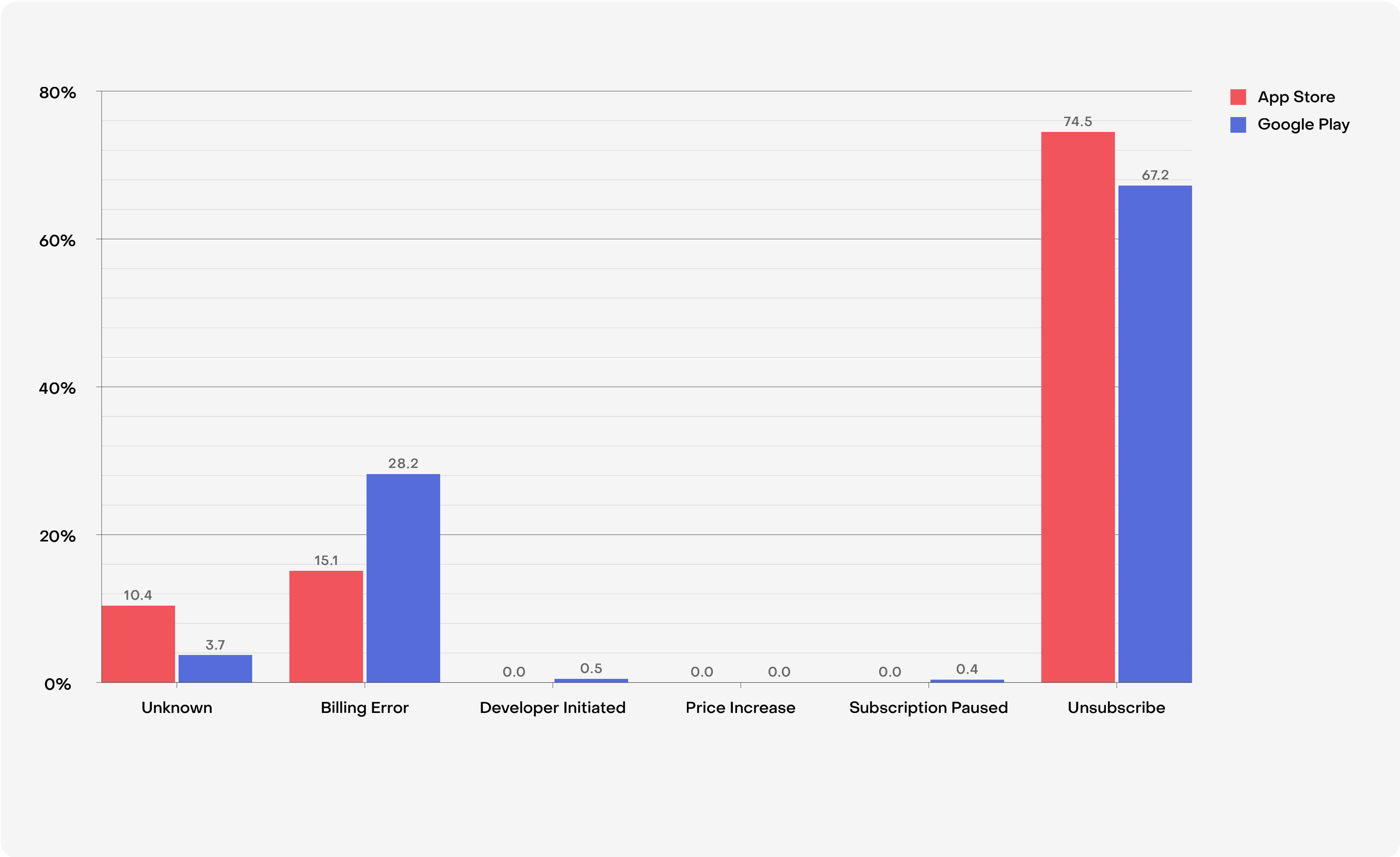
- Send Apple real usage data – Help Apple see whether a user actively engaged with their subscription before requesting a refund.
- Customize refund preferences – Choose whether to always support refunds, always oppose them, or let Apple decide case by case.
- Track refund trends over time – Our Refund Requests Chart lets you see how Apple is handling your requests, so you can fine-tune your approach.

The Impact: Real Results from Dipsea

When Dipsea started using RevenueCat Refund Handling, they reduced refunds by 36%—without harming customer satisfaction.

[Learn How Dipsea Reduced Refunds by 36%](#)

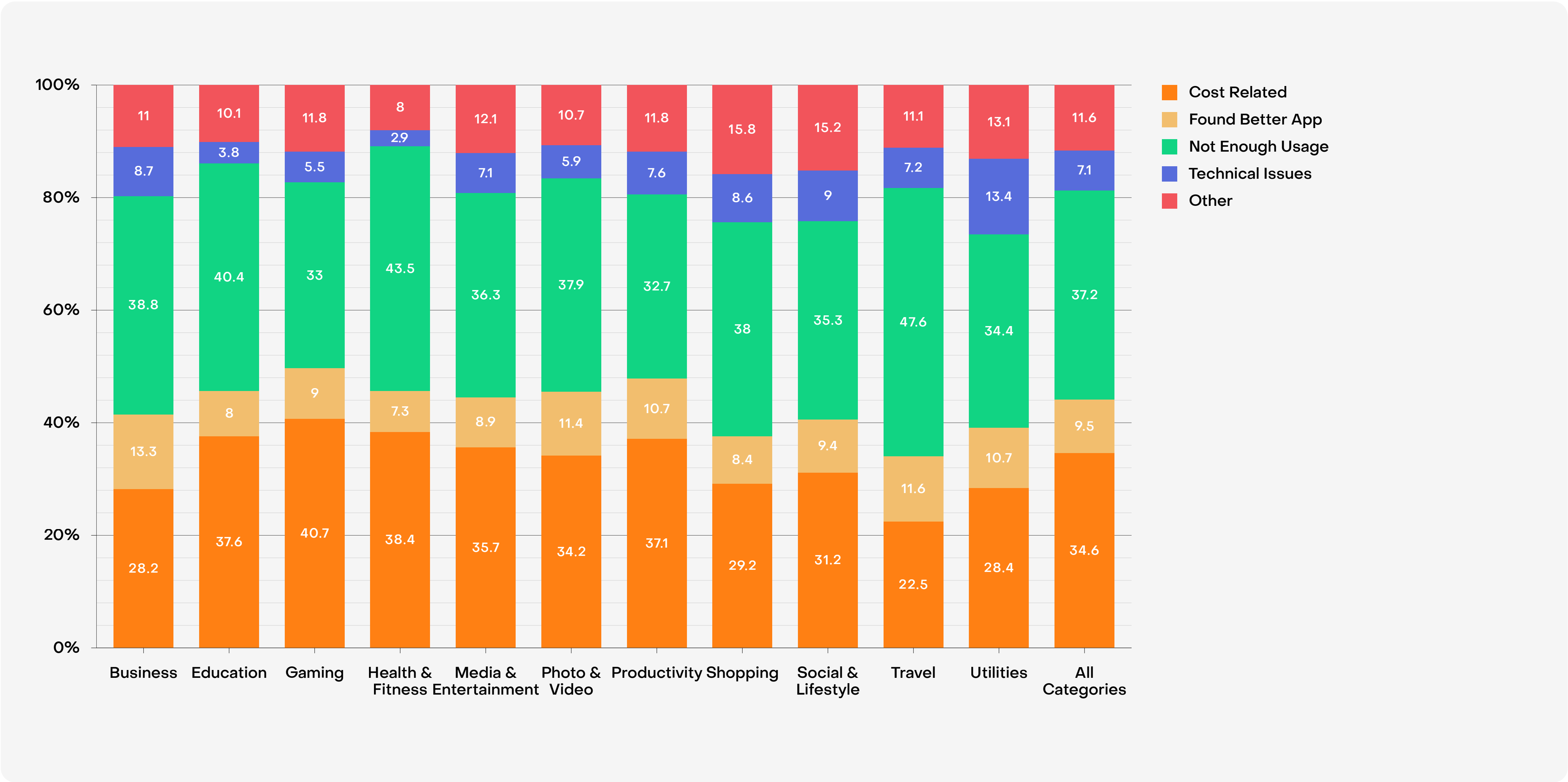
Cancellation Reasons, By App Store



- Unsubscribing is the dominant reason for cancellations on both platforms, accounting for 74.5% on the App Store and 67.2% on Google Play. This suggests that user churn is more often voluntary than due to external factors
- Billing errors contribute to 28.2% of cancellations on Google Play, significantly higher than the 15.1% on the App Store. This could indicate regional payment processing challenges or lower transaction success rates on Google Play
- Price increases are not a reported reason for cancellations, suggesting that pricing changes either rarely occur or do not significantly impact subscriber retention

Google Churn Survey Answers, By Category

“Not enough usage” is the top cancellation reason across all categories, with rates ranging from 32% to 47%. This suggests that many churned users did not find ongoing value in their subscriptions.



Tackle billing issues and onboarding to reduce churn

Cancellation data from the Apple App Store and Google Play Store shows that unsubscribing is the leading cause of churn (74.5% and 67.2%, respectively). However, a significant opportunity to reduce churn lies in addressing billing errors, particularly on Google Play, where they account for 28.2% of cancellations, compared to 15.1% on the App Store.

On Google Play, the top reason for unsubscribing is insufficient usage (37.02%), followed by cost concerns (34.64%), and finding a better app (9.54%). This high rate of cancellations due to low usage suggests that many apps could improve retention by enhancing onboarding and communicating value more effectively to drive engagement.



Daphne Tideman
Growth Advisor & Consultant

How to time reactivation campaigns for maximum impact



Jackson Shuttleworth
Duolingo



1 Act fast — most users don't come back after a week

The best time to re-engage a churned user is within the first three to four days. Duolingo found that users who stay away for longer become significantly harder to bring back. They send daily reminders for up to seven days, stopping when effectiveness drops.

2 Use behavioral signals to personalize timing

Instead of relying on fixed schedules, time win-back messages based on past engagement patterns. Duolingo schedules reminders 23.5 hours after a user last engaged, ensuring notifications land at a moment when the user is most likely to take action.

3 Use social connections for long-term reactivation

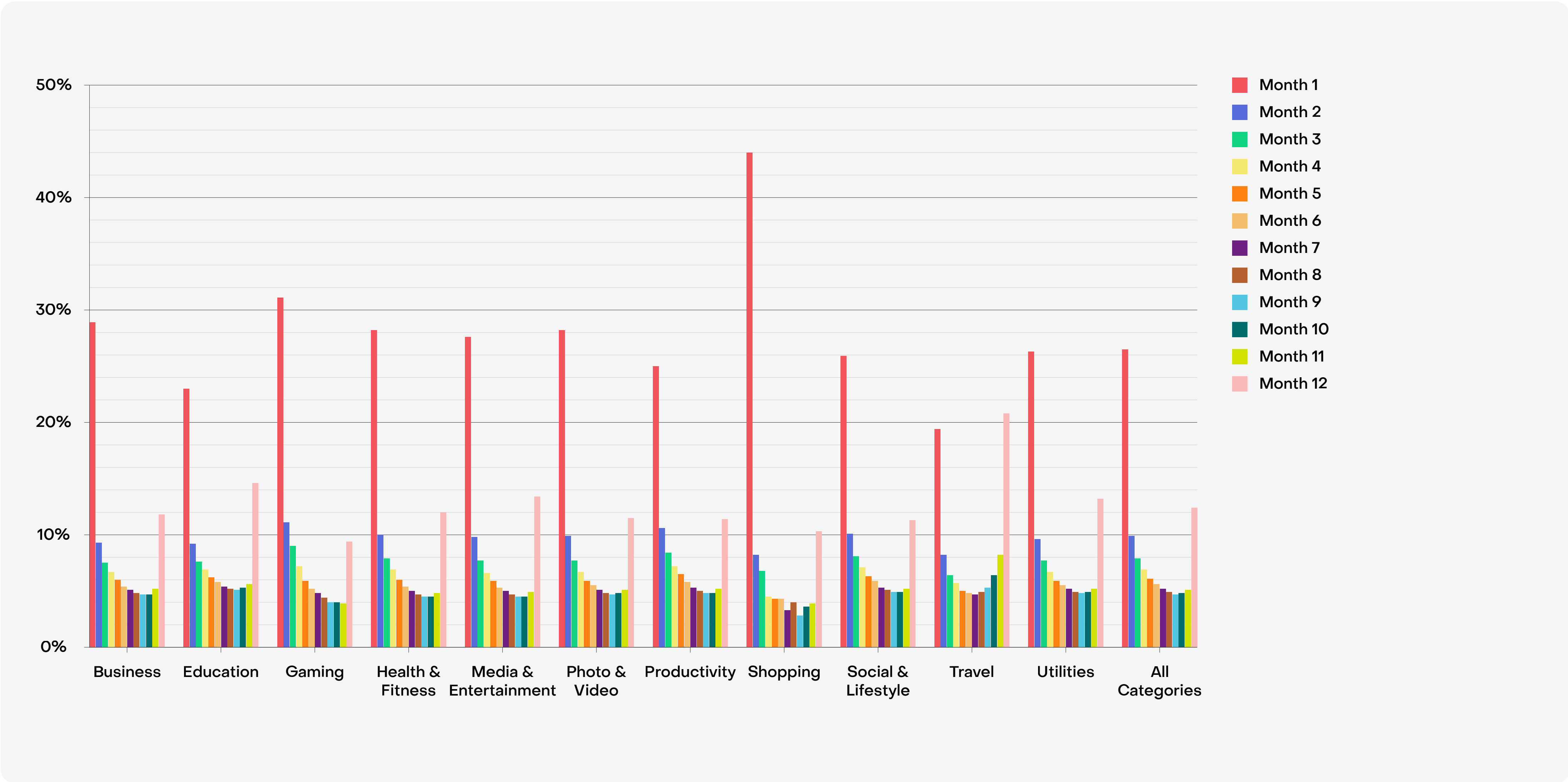
For users who have been inactive for weeks or months, social reactivation beats app-driven outreach. Duolingo prompts active users to bring back their friends, which consistently outperforms standard win-back campaigns - even leaderboard competitors drive higher reactivation rates than app reminders.



Listen to Jackson's Minisode
(~15 min) on the Sub Club Podcast

Cancellation Timeline for Annual Subscriptions

The first month sees the highest cancellation spike across all categories, often exceeding 30%. This suggests that many users opt out early, possibly due to second thoughts after purchase or concerns about a ‘forgotten renewal’ later on.



Monthly plans reactivate best, but higher-priced tiers drive stronger returns

Monthly subscriptions drive the highest reactivation rates, while yearly plans struggle

Monthly subscriptions have the highest reactivation rates, likely due to lower commitment barriers. Weekly plans follow at 9.37%, while yearly plans struggle at 4.58%, emphasizing the need for a strong and evolving value proposition to retain annual subscribers.

Photo & Video and Productivity lead in monthly reactivations, while Gaming underperforms, perhaps due to player fatigue. Shopping also struggles, possibly due to limited recurring engagement. Yearly reactivations are strongest for Media & Entertainment and Photo & Video, which both benefit from continuous content refreshes.

North America leads in monthly and weekly reactivations but struggles yearly. In contrast, MEA and Western Europe show stronger yearly retention, indicating long-term user commitment.

Higher-priced plans show stronger reactivations

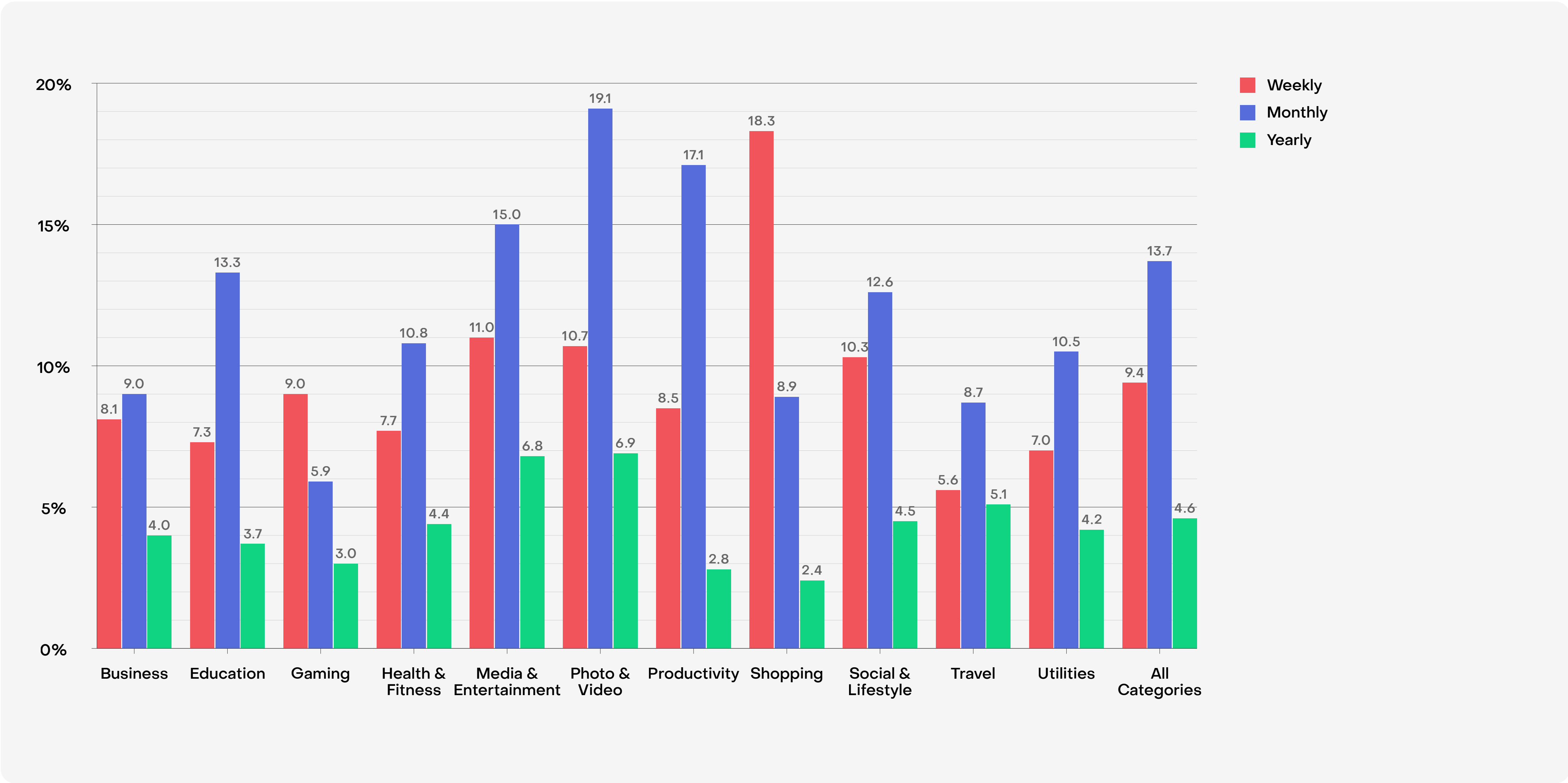
Reactivation rates rise with pricing tiers, likely due to higher perceived value, stronger initial commitment, and sunk cost effects. Low-priced plans see the lowest reactivation rates as they attract casual users with weaker brand attachment or lower disposable income. The small gap between mid and high-priced tiers suggests publishers should experiment with pushing higher-priced plans.



Alice Muir Kocourková
Growth Lead

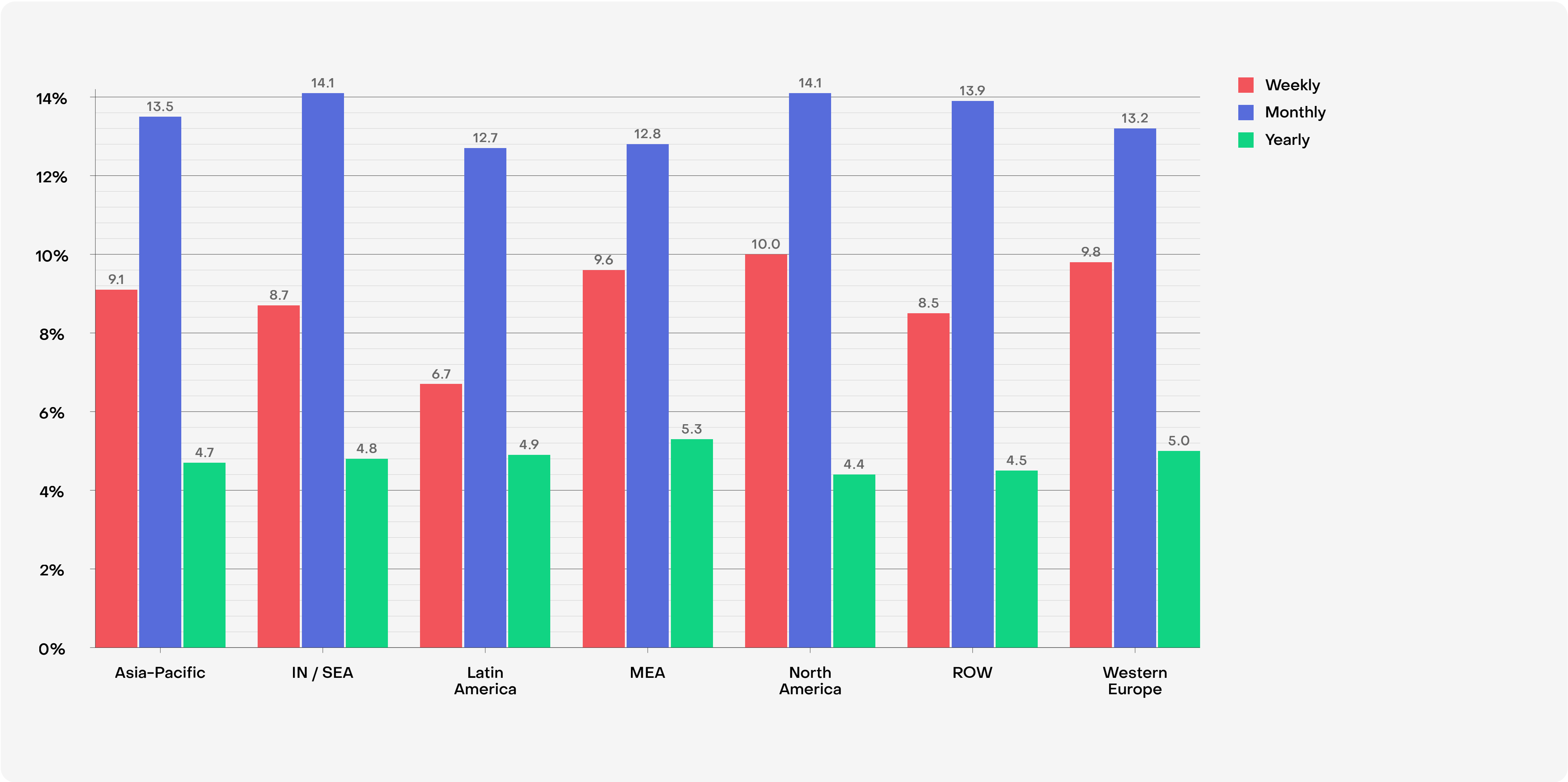
Share of Churners that Reactivate in Year 1, By App Category

Weekly plans show a strong reactivation trend in shopping (18.3%), indicating that short-term churners may still find value in occasional access to these services.



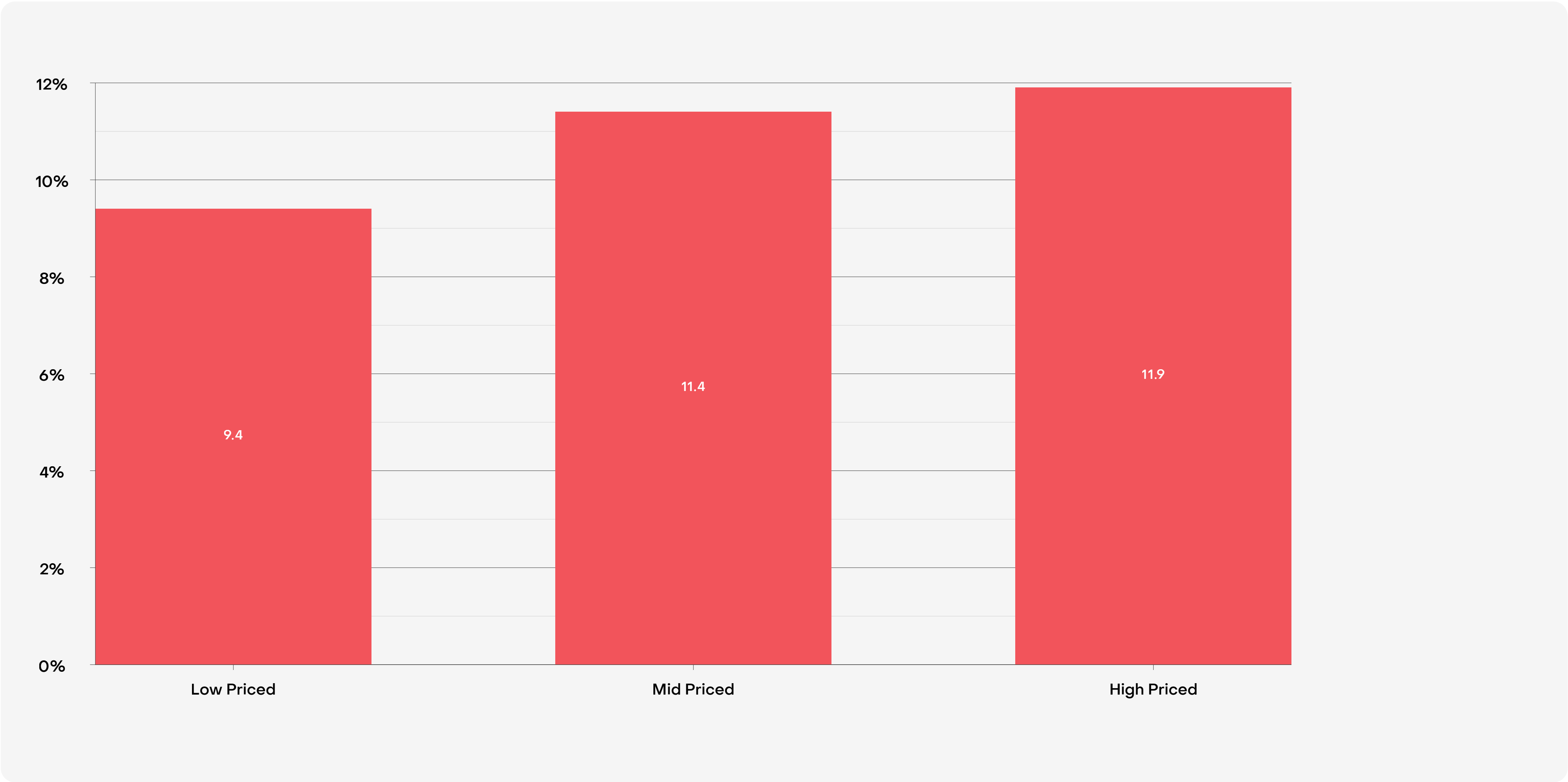
Share of Churners that Reactivate in Year 1, By Geography

Monthly churners have the highest reactivation rates across all regions, exceeding 13% in most cases. This suggests that short-term churners are more open to returning compared to longer-term subscribers.



Share of Churners that Reactivate in Year 1, By Pricepoint

Higher-priced subscriptions have the highest reactivation rate (11.9%), suggesting that users who leave premium plans may still see enough value to return within a year.



Acquisition

05

Data and
insights by



Winning at Subscription App Acquisition in 2025



Shani Rosenfelder

Director of Content Strategy & Market Insights at AppsFlyer

User acquisition for subscription apps has never been more competitive—or more expensive. Based on \$1.5B in ad spend measured from October 2023 to December 2024, AppsFlyer’s data shows how acquisition costs are evolving across platforms, regions, and verticals.

It’s no secret that CPIs are rising. On iOS globally, the cost per install (CPI) for subscription Photo & Video apps is now nearly \$15, and Books & Reference is nearing \$14.50 per user. But that’s only half the story. The real challenge isn’t just installs—it’s finding users who will pay. That’s where Cost Per Paying User (CPPU) comes in. In many categories, paying users cost 4–5× more than a regular install. If your app isn’t set up for strong LTV, you’re just buying downloads that won’t convert.

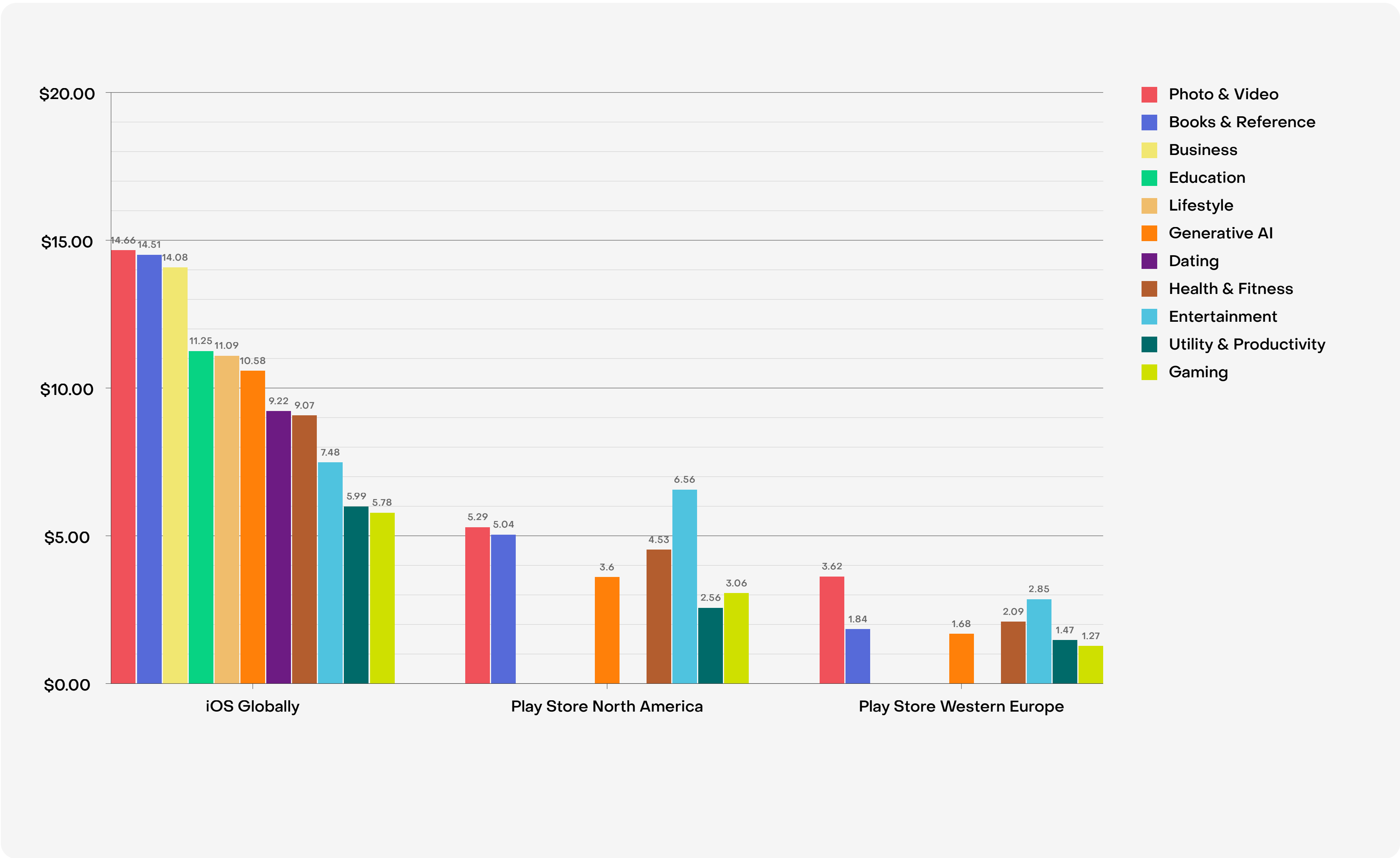
The gap between high and low-cost markets is growing, too. North America and Western Europe remain premium regions, where CPIs can be 10–20× higher than in Southeast Asia or Latin America. Winning apps aren’t just going global—they’re running localized campaigns in cost-effective markets.

AI-focused apps are naturally now among the hottest verticals, with CPIs over \$10 globally on iOS. However, CPIs for AI-focused apps on Android in North America are still under \$4, presenting an opportunity for acquiring users at reasonable costs. Overall, the potential for strong engagement and user retention can make these acquisition costs worthwhile—if users see real value quickly.

Ultimately, the subscription apps finding success today go beyond installs, optimizing the entire funnel from install to subscription. They’re testing web-to-app flows to lower costs and using AI-powered audience targeting to acquire high-intent users. As CPIs continue to climb, the real winners treat each UA dollar as an investment in user lifetime value, not just an install.

For a deeper dive into how subscription models fit into hybrid monetization strategies, check out AppsFlyer’s [State of App Monetization report](#).

Cost per Install, By Category and By Store



- The CPI gap between iOS and Play Store in North America is striking, with iOS CPIs reaching nearly 3x those of Play Store in some categories
- Cost per install varies significantly across categories, with Photo & Video leading the pack—especially on iOS, where the top quartile sees CPIs above \$14. The high CPI for this category could be attributed to the competitive landscape
- North America’s Play Store CPI is lower than the Play Store’s, but still sees notable differences by category. Western Europe sees a substantial drop in CPI compared to North America although the variation between categories remains similar

How to optimize user acquisition across major ad channels



Shane Ly
AppsFlyer



1 Signal recovery is improving ad efficiency

iOS signal loss made UA harder, but advanced self-attributing networks (SRNs) on TikTok, Meta, and Snapchat are restoring key data points. Apple Search Ads now supports view-through attribution, helping capture conversions that might have been missed.

2 Web-to-app funnels create new acquisition opportunities

More apps are using landing pages and web subscriptions to capture high-intent users before directing them to the app. Meta and Google Ads support these flows, allowing apps to bypass platform fees and test more flexible pricing strategies.

3 Reddit and alternative channels are gaining traction

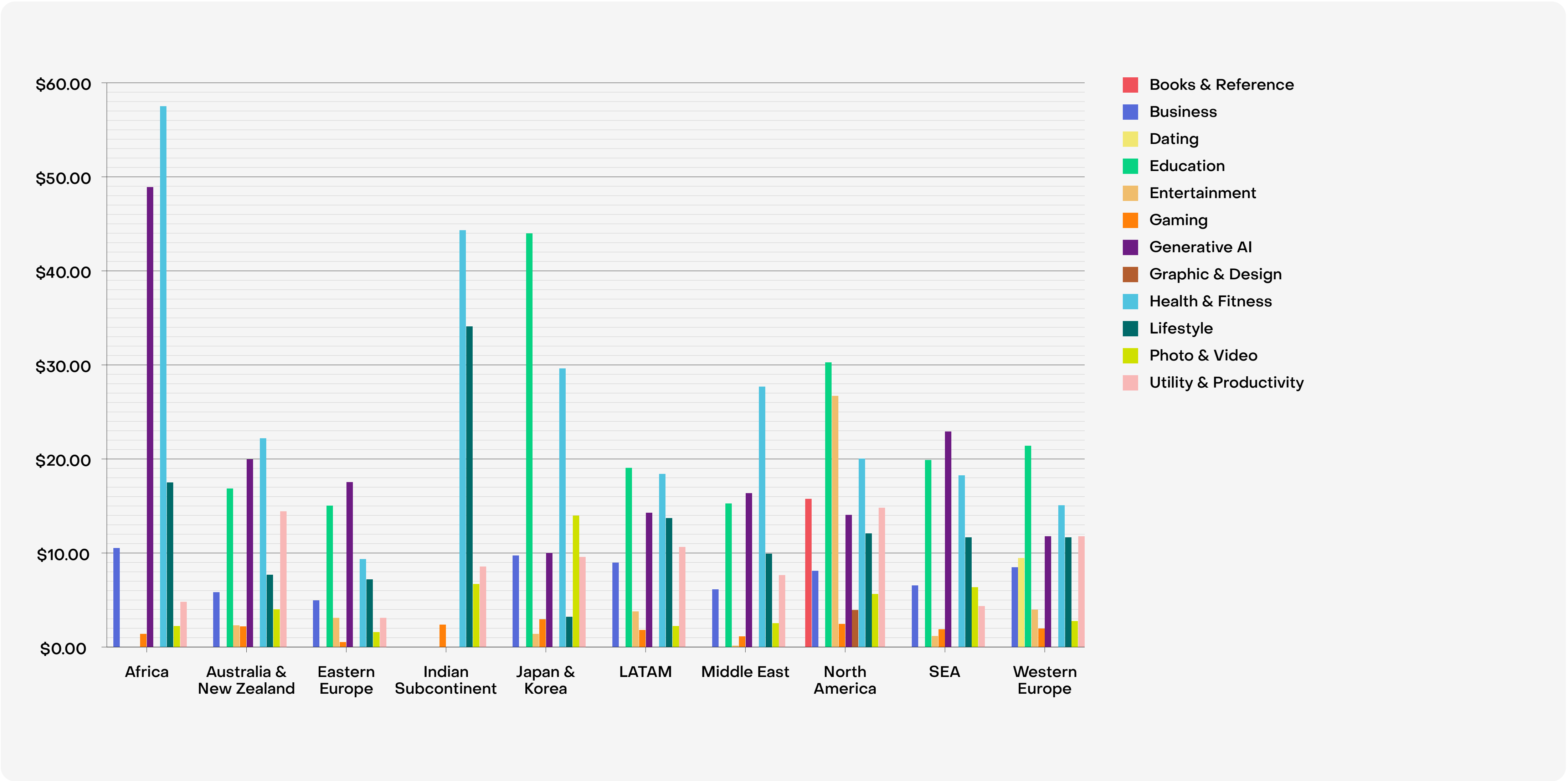
Reddit is investing in app install campaigns, making it an overlooked but promising UA channel – especially for niche communities. AppsFlyer data shows growing spend across multiple platforms, as confidence in attribution continues to improve.



Listen to Shane's Minisode
(~15 min) on the Sub Club Podcast

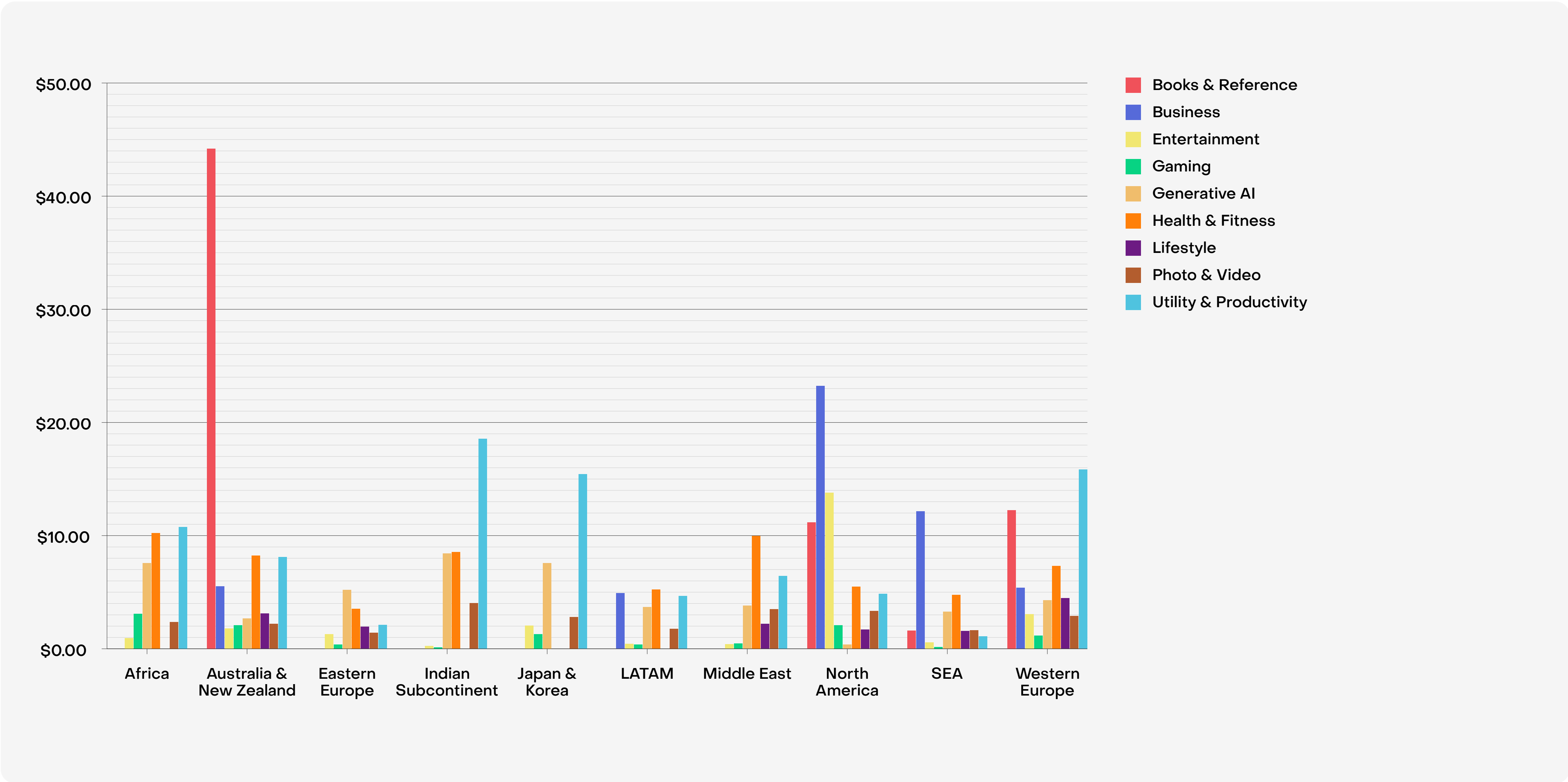
Cost per Paying User on iOS, By Category & Geography

Cost per paying user (CPPUs) naturally varies dramatically by region and category. Africa and the Indian Subcontinent show some extreme outliers. Japan & Korea and North America see elevated CPPUs in Education, Health & Fitness and Generative AI apps, whilst emerging markets like Eastern Europe and LATAM maintain lower CPPUs across most categories.



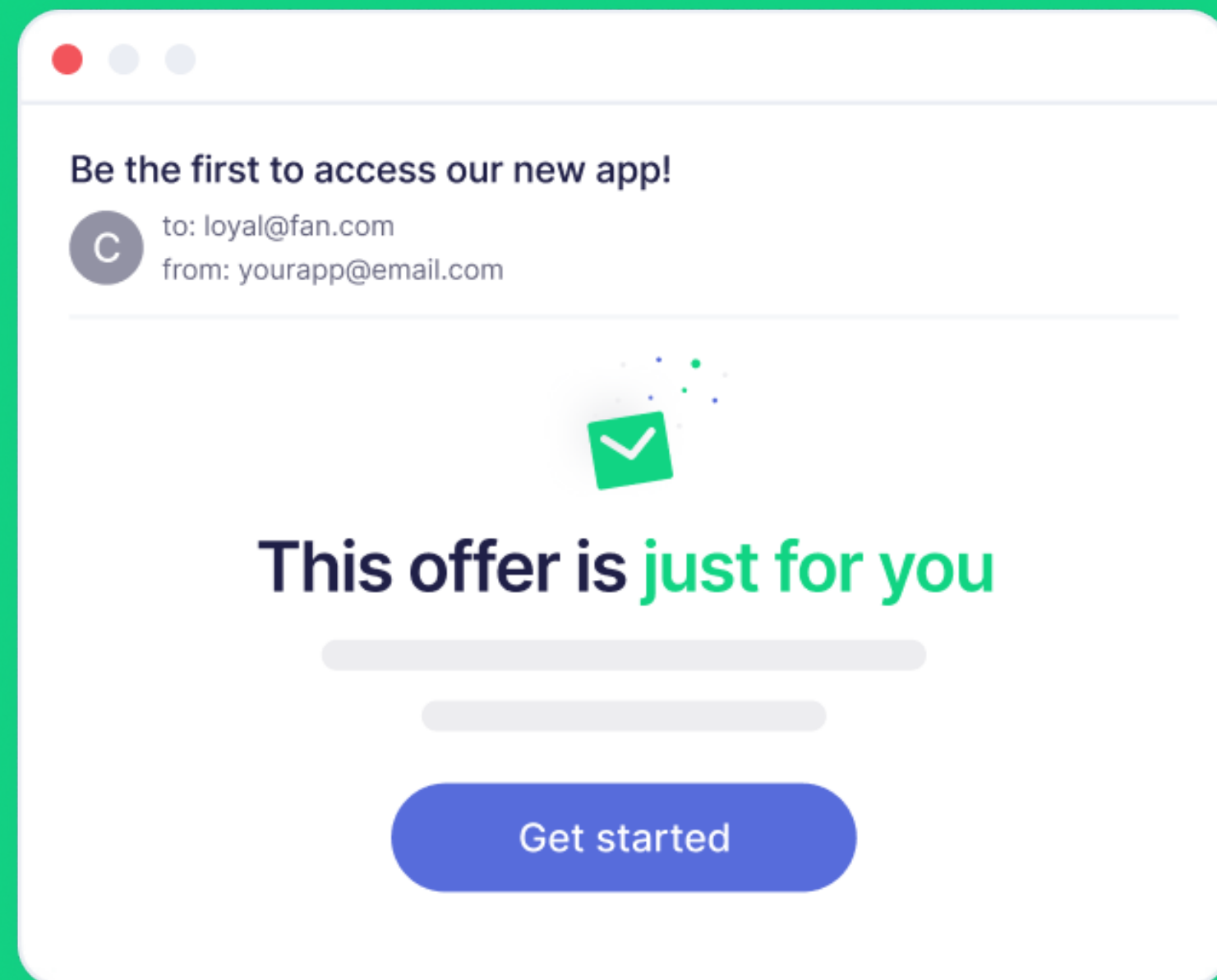
T3: Cost per Paying User on Android, By Category & Geography

Books & Reference apps in ANZ demonstrate an outlier with highest CPPU overall, but the trend of elevated CPPUs for the category mostly applies across premium markets. The same is true for Business, Utility & Productivity and Generative AI apps -- while gaming apps and emerging markets tend to have lower CPPUs.



Pre-sell app subscriptions directly from the web

Bypass the app store bottleneck and convert your highest-intent users before they even open your app



Acquiring new users through app installs can be **pricey**—especially when you already have an **owned audience** ready to buy. With **RevenueCat Web Billing**, you can send an email, newsletter, or on-site promo offering a direct path to subscribe, then prompt users to download the app after they've paid. This reduces friction, saves on platform fees, and lets you pass along better deals to your most loyal fans.

Key Benefits:

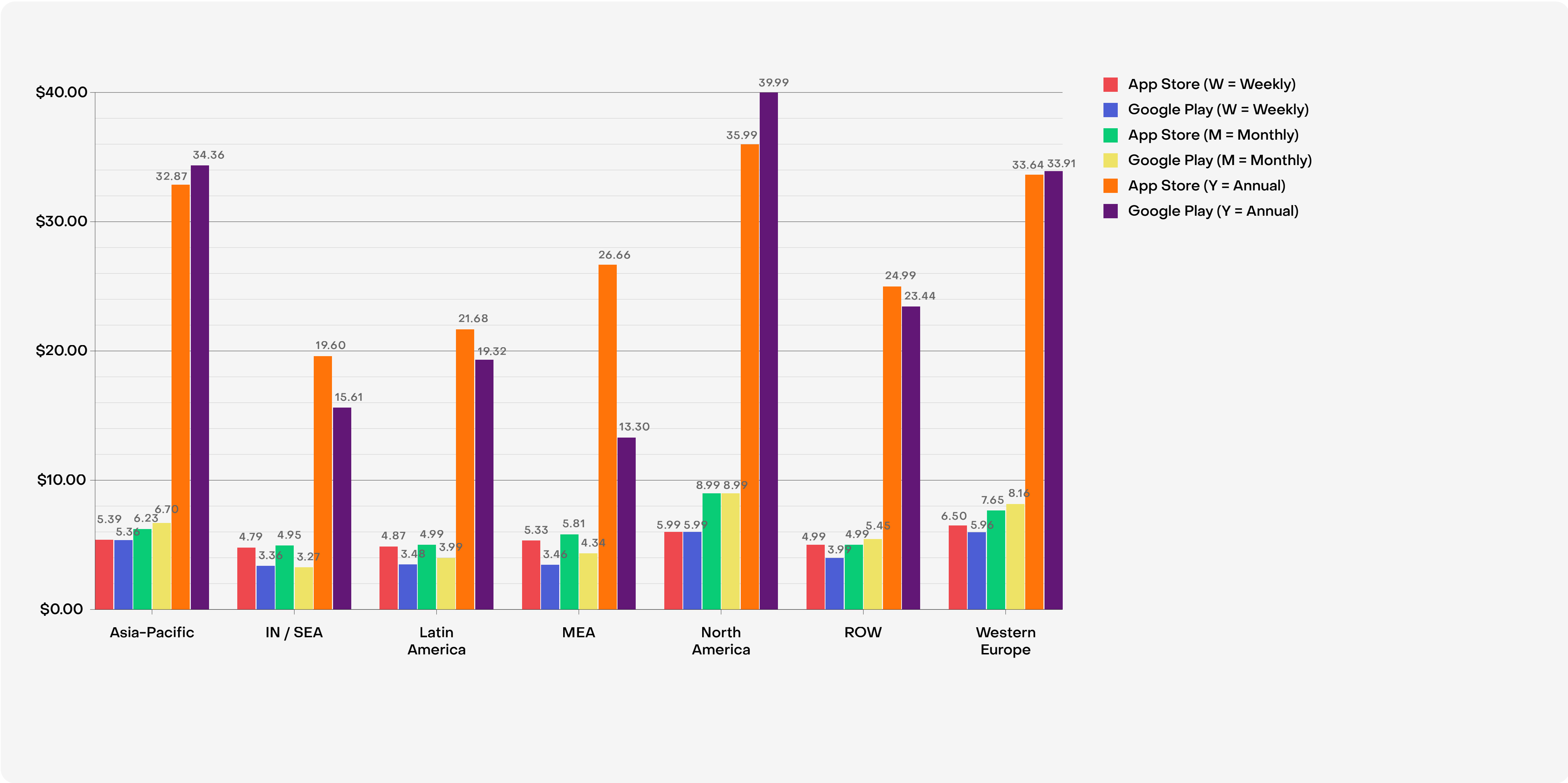
- **Lower Costs, Higher Conversions**
Eliminate a conversion step by letting users subscribe immediately via a web checkout, rather than waiting until after they've downloaded your app
- **Capture Your Biggest Fans First**
Already built up a social following or email list? Give them a direct buy link to subscribe on the spot—no “search for our app” hoops required
- **Keep More Revenue (and Pass on Savings)**
By avoiding some platform fees, you can invest in deeper discounts, loyalty offers, or marketing programs that drive long-term growth
- **Seamless Setup with RevenueCat**
Our Web Billing solution syncs subscription data across platforms, so customers who subscribe on the web still get full premium access in your app—no extra code or complicated integrations necessary

Learn More About RevenueCat Web Billing

Comparing Google Play & the App Store

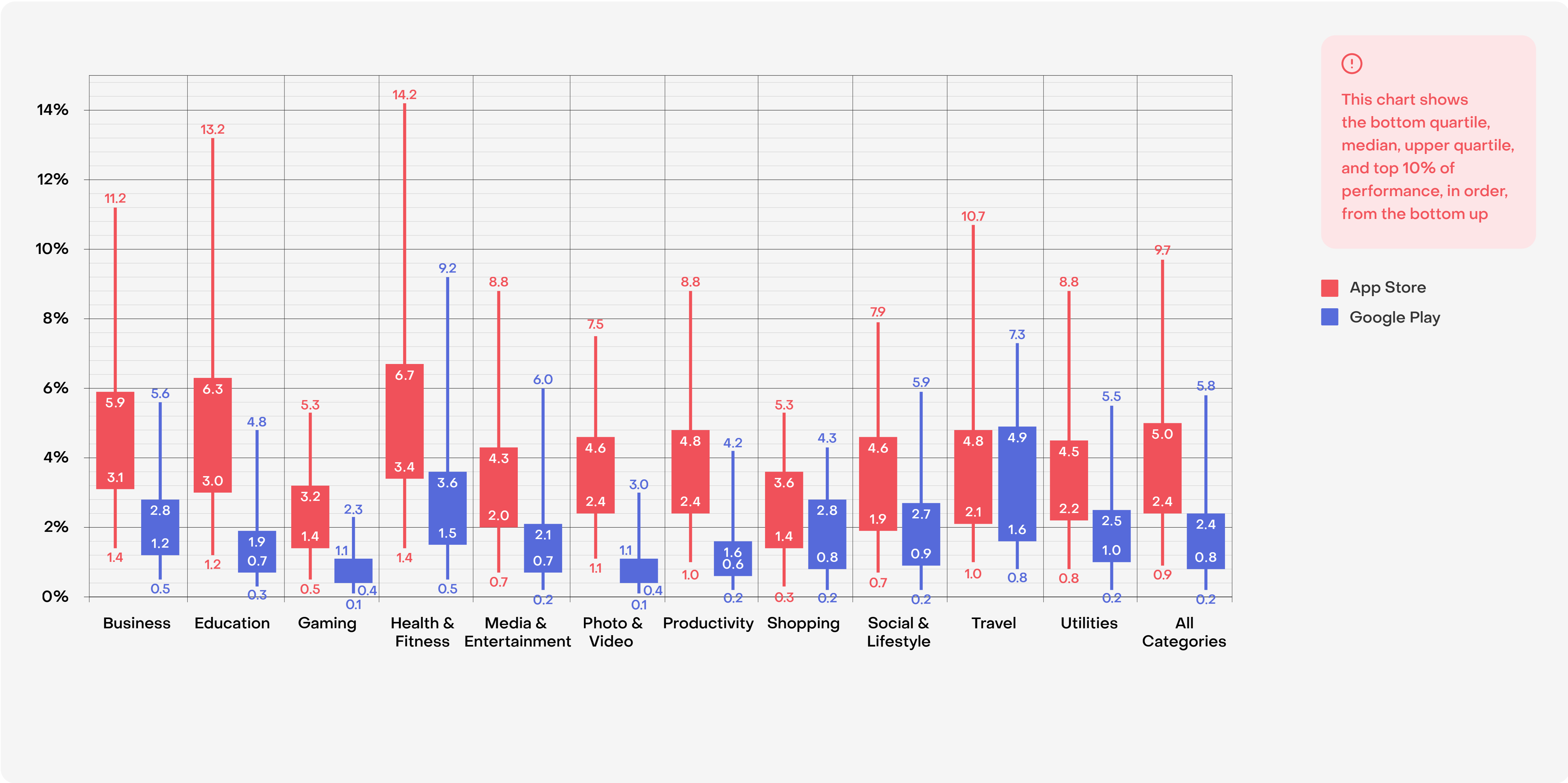
Median Price per Plan Duration, By Geography

Annual subscription prices are generally higher on the App Store than Google Play, except in North America. Monthly and weekly plan prices show more variation across regions, with some emerging markets seeing significantly lower prices on Google Play.



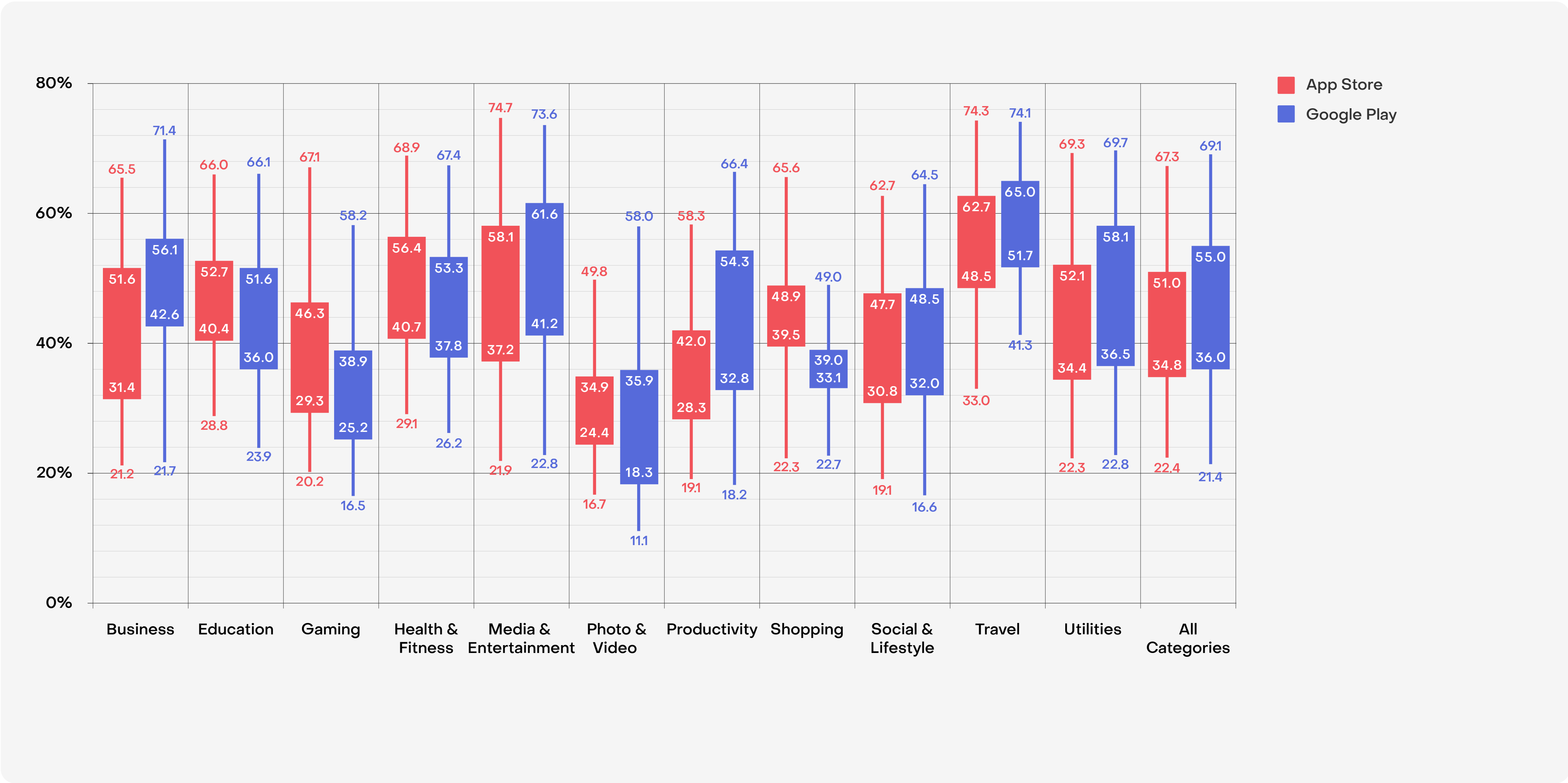
Day 35 Download to Paid Conversion, By Category

Day 35 download-to-paid conversion rates are consistently higher on the App Store than Google Play across all categories, with Business, Health & Fitness, and Education apps showing the largest gaps.

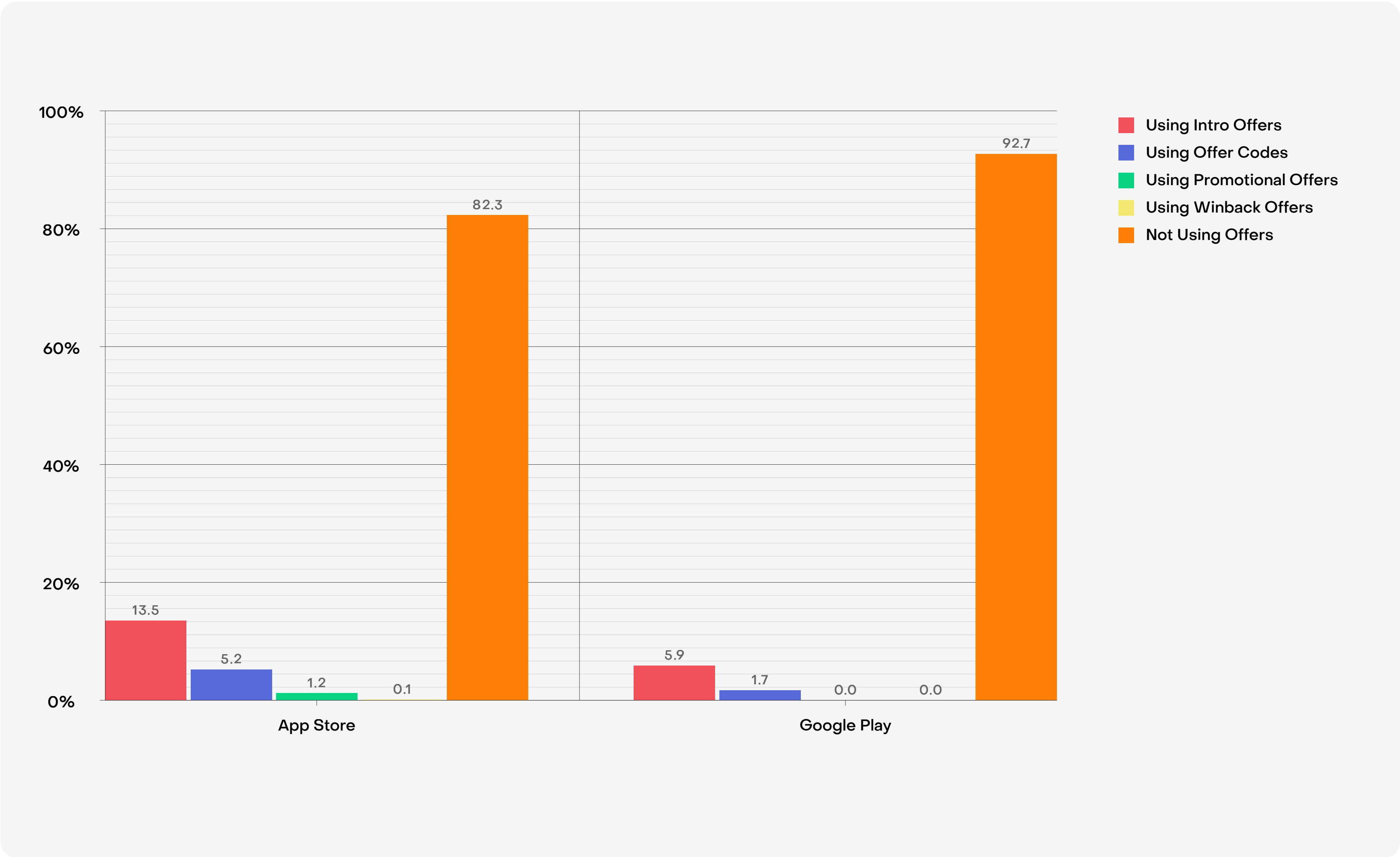


Trial Conversion to Paid, By Category

Google Play outperforms the App Store in trial conversion for Business and Media & Entertainment, with medians of 42.6% and 41.2%, respectively. This may indicate stronger regional adoption or user trust in these categories.

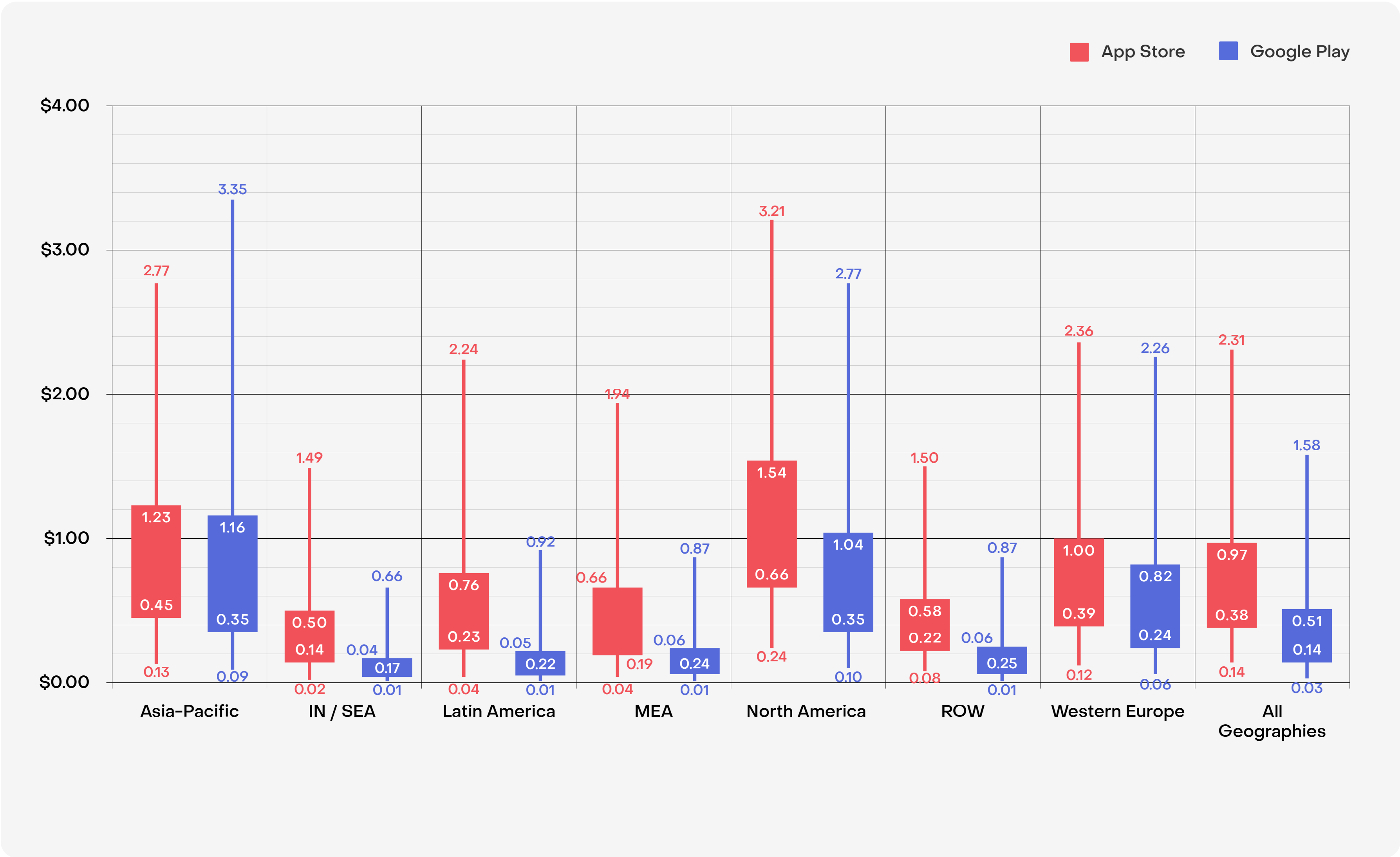


Offer Usage By Store & Offer Type



- The App Store drives significantly higher offer adoption, with 17.6% of users utilizing some form of offer, compared to just 7.3% on Google Play. This suggests that Apple’s ecosystem encourages more promotional usage
- Introductory offers dominate offer usage, representing 13.5% of transactions on the App Store and 5.9% on Google Play. These offers are a key driver of trial-based acquisition on both platforms
- Despite offer adoption differences, a majority of transactions on both platforms occur without offers, with 82.3% on the App Store and 92.7% on Google Play. This underscores that core pricing strategy remains the primary revenue driver

D60 Revenue per Install, By Geography



- North America leads revenue per install across both platforms, with median values of \$0.66 on the App Store and \$0.35 on Google Play. This highlights strong monetization in premium markets
- The App Store consistently outperforms Google Play across all regions, with global median D60 revenue at \$0.38 versus \$0.14, reinforcing Apple’s stronger monetization potential
- Google Play sees its highest revenue per install in Asia-Pacific (\$0.35 median), reflecting strong growth potential in this region compared to other emerging markets

How to unlock revenue growth on Google Play



Tammy Taw
Google



1 Expand beyond subscriptions to capture new buyers

Many users in emerging markets prefer one-time purchases over subscriptions, especially in categories like social, dating, and entertainment. Introducing consumable IAPs (e.g., class packs in fitness apps or AI-generated content credits) can increase buyer volume without cannibalizing existing subscriptions.

2 Use localized pricing and alternative payment methods

Pricing that works in the U.S. or Europe may be too high in emerging markets, where prices are 40% lower on average. Google Play data shows that adapting to local purchasing power – with regional pricing, installment payments, and alternative payment methods – can boost conversions and overall revenue.

3 Optimize purchase flows to reduce friction and increase LTV

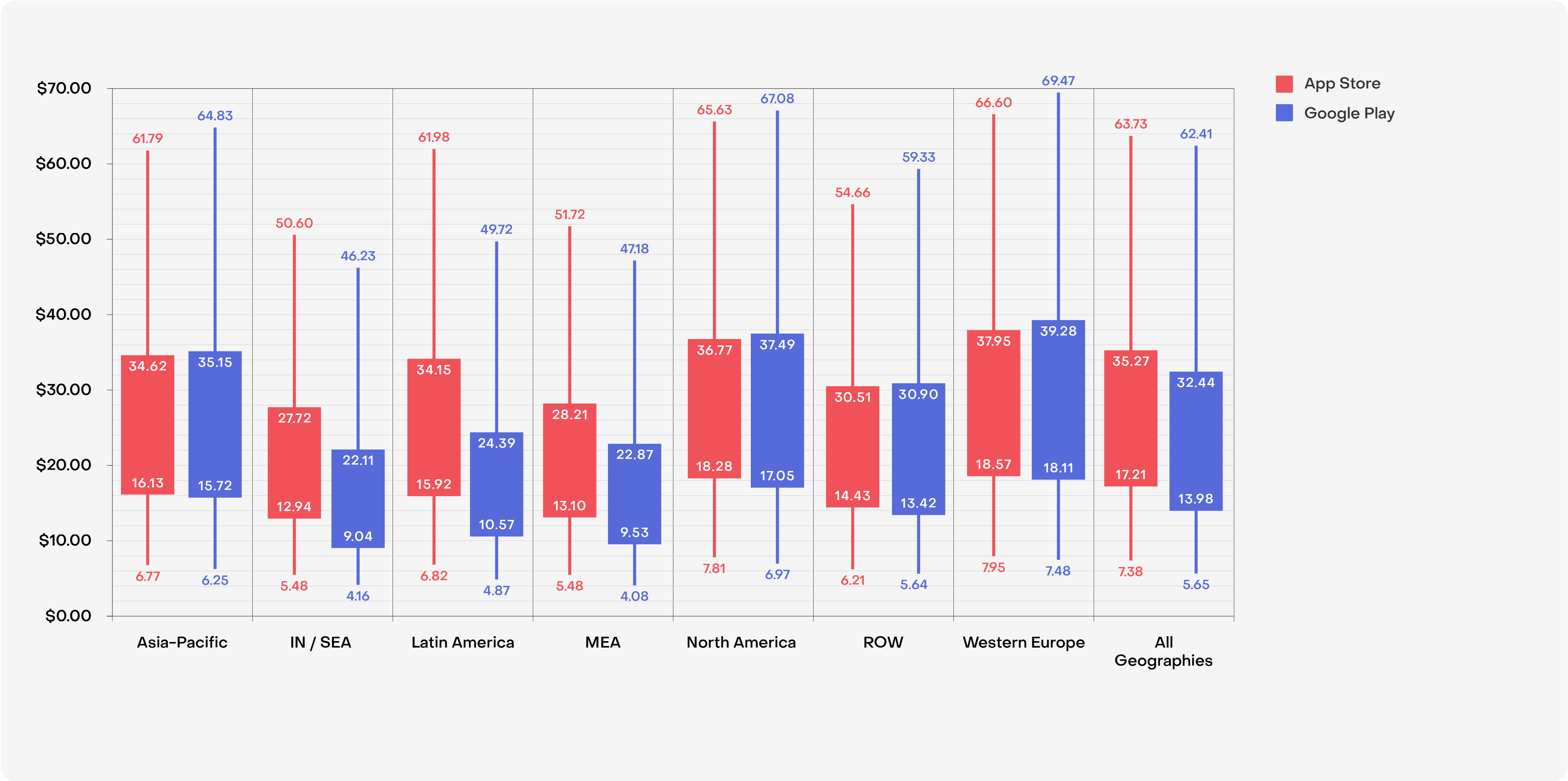
Too many pricing options can overwhelm users and delay decisions. Instead, introduce the right offer at the right moment based on user behavior signals. Google Play's benchmarking tools and Play Console analytics help developers fine-tune pricing, offers, and subscription models for higher conversions and long-term retention.



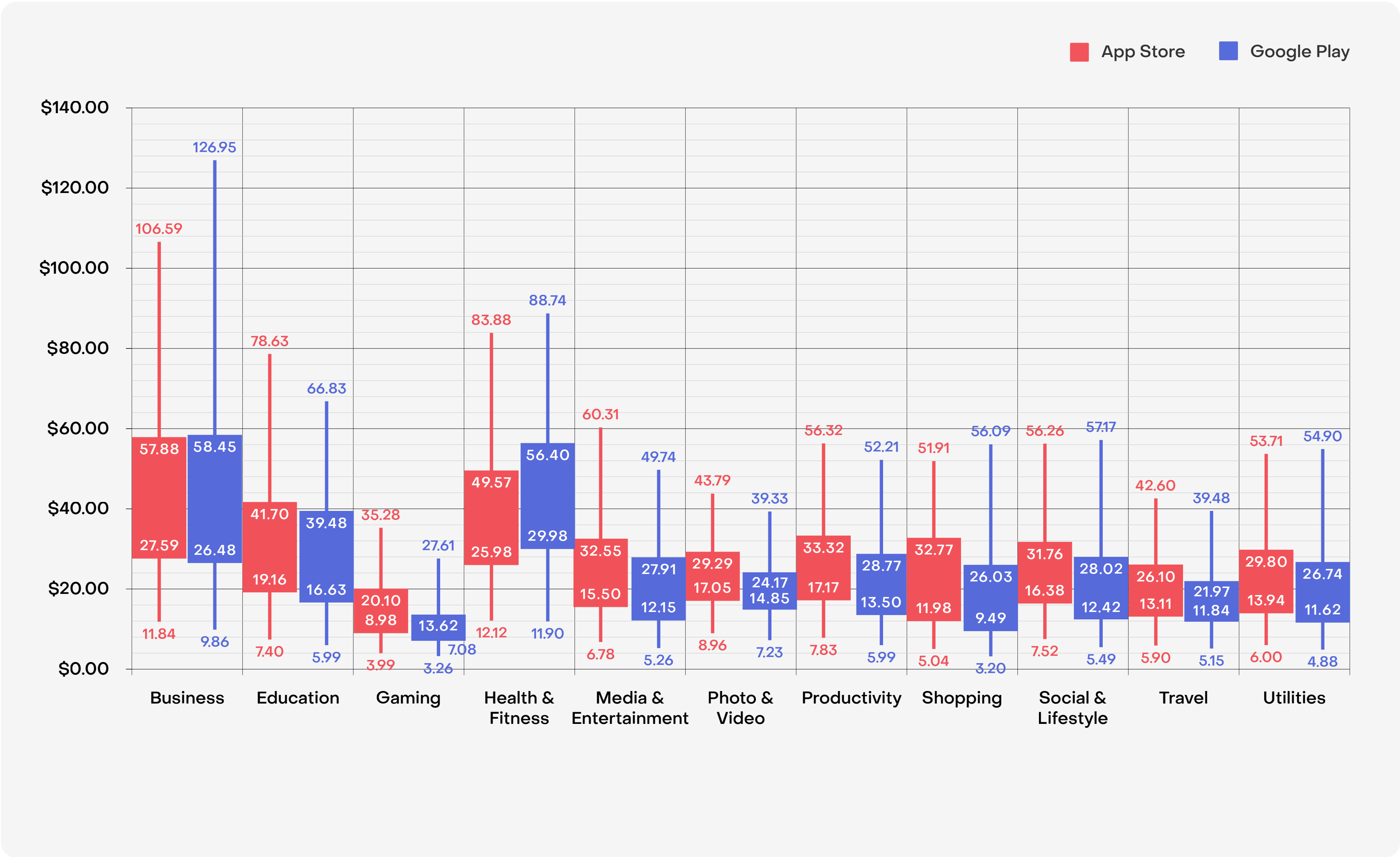
Listen to Tammy's Minisode
(~15 min) on the Sub Club Podcast

Y1 Realized LTV, By Geography

Asia-Pacific shows competitive performance between stores, with median LTV near \$35. This suggests strong growth potential in subscription monetization across the region.



Y1 Realized LTV, By Category



- Business and Health & Fitness categories generate the highest LTV across both platforms, exceeding \$25 median LTVs, reflecting strong demand for productivity and wellness subscriptions
- The App Store generally leads Google Play in LTV across categories, though the gap is narrower in Health & Fitness and Business, where Google Play's top quartile LTV rivals Apple's
- Media & Entertainment sees the widest LTV distribution, with top quartile LTVs reaching \$32.55 on the App Store and \$27.91 on Google Play, indicating strong performance among top apps

Optimize pricing, packaging & paywalls for each audience

Segment users by any attribute you can define like geography, platform, behaviours, demographics and more.

[illegible]

Control when and where your paywall appears —trigger it on app open, feature access, user events, even schedule offers in advance.

If the customer matches

Custom attribute

Select key...

×

+ Add condition

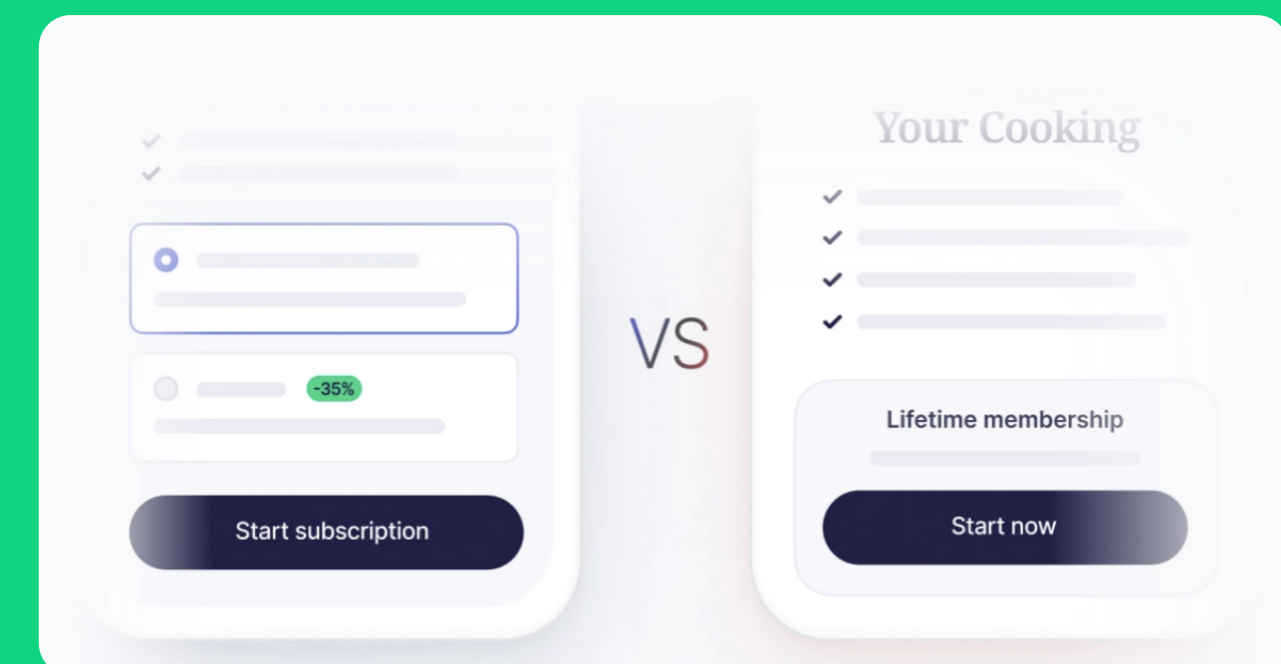
then show

annual

for

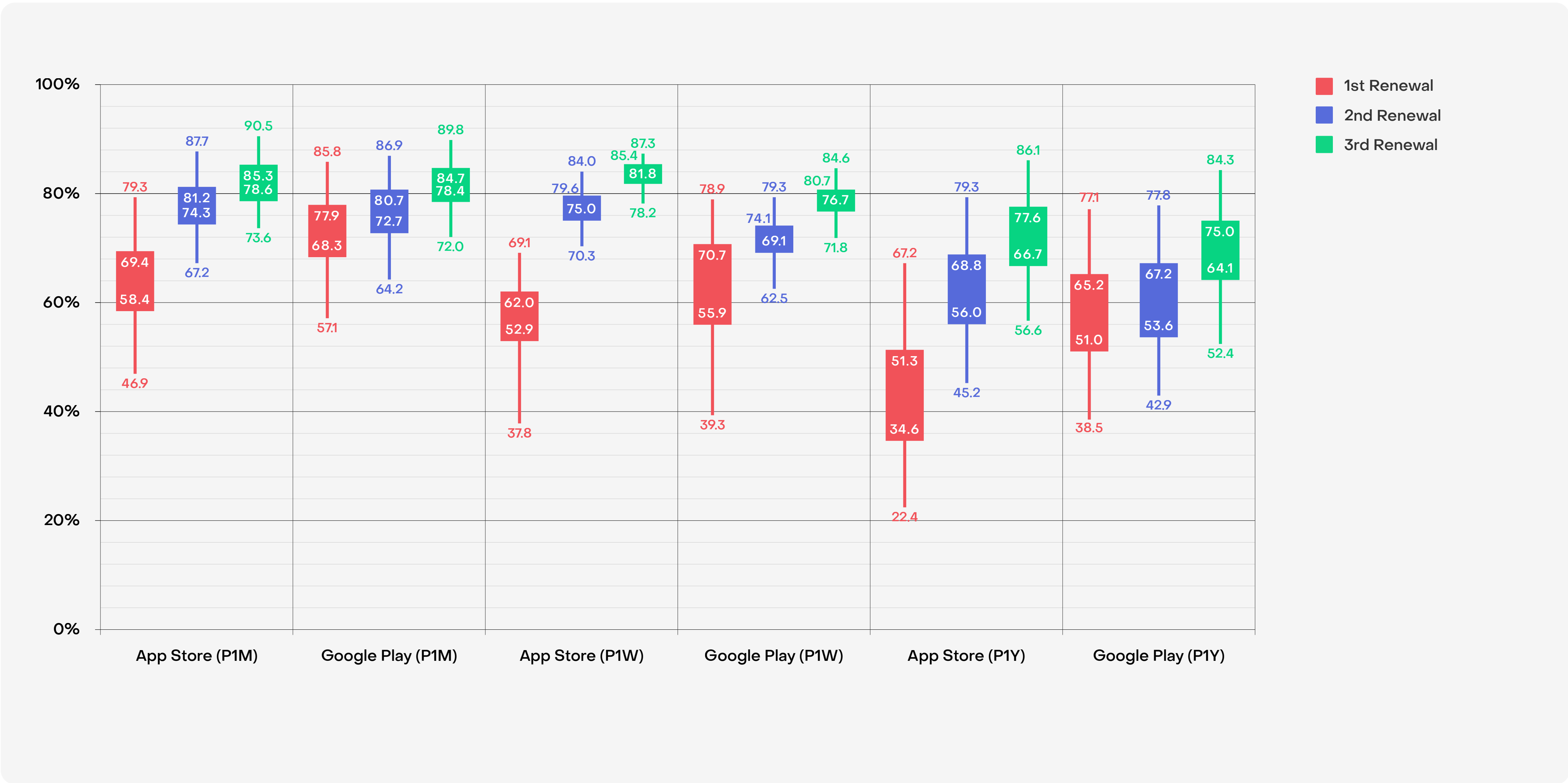
Select placement...

Design, test, and deploy audience-tailored paywalls all from the RevenueCat dashboard with no code or app store approval required.

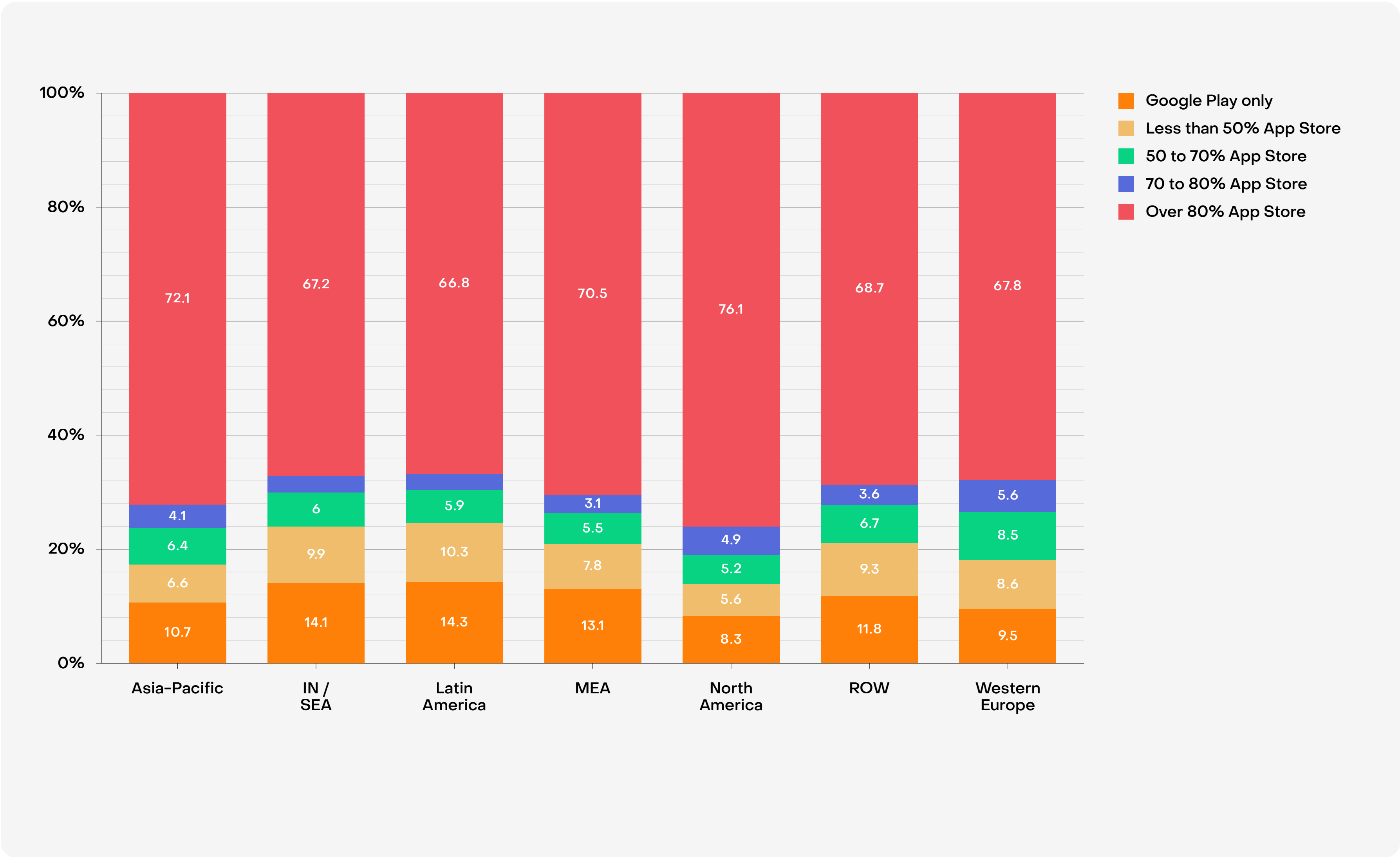


First 3 Renewals, By Plan Duration

Google Play leads in first-month renewal rates, outperforming the App Store across plan durations. However, the App Store catches up by the second and third renewals, particularly for annual plans.



Platform Revenue Split, By Geography



- The vast majority of apps generate most of their revenue from the App Store, with over 67% of apps in every region earning at least 80% of their revenue from iOS users. This highlights Apple’s stronger monetization potential
- Very few apps rely exclusively on Google Play, with only 10–14% of apps in each region making all their revenue from Android users. Even in Google Play’s strongest regions, most apps still see substantial revenue from iOS
- Emerging markets like Latin America and India/Southeast Asia have the highest proportion of apps generating more balanced revenue, with around 10% of apps earning 50–70% of revenue from the App Store. This suggests more parity between platforms in price-sensitive regions

How to succeed on iOS vs. Android



Matt Rouif
Photoroom



1 Android expands global reach, but iOS drives early traction

iOS dominates in U.S. and premium markets, making it the best platform for an initial launch. Android, however, is essential for expanding globally, especially in emerging markets where adoption is higher. Apps that target international scale should prioritize localization and pricing strategies for Android users.

2 User behavior and revenue potential vary by platform

Monetization differs significantly – photo apps see up to 30x higher revenue per user on iOS due to Apple’s stronger photography brand and higher user spending. However, on Android, business-oriented users spend more when an app directly impacts their income, making B2B and productivity apps strong contenders for success.

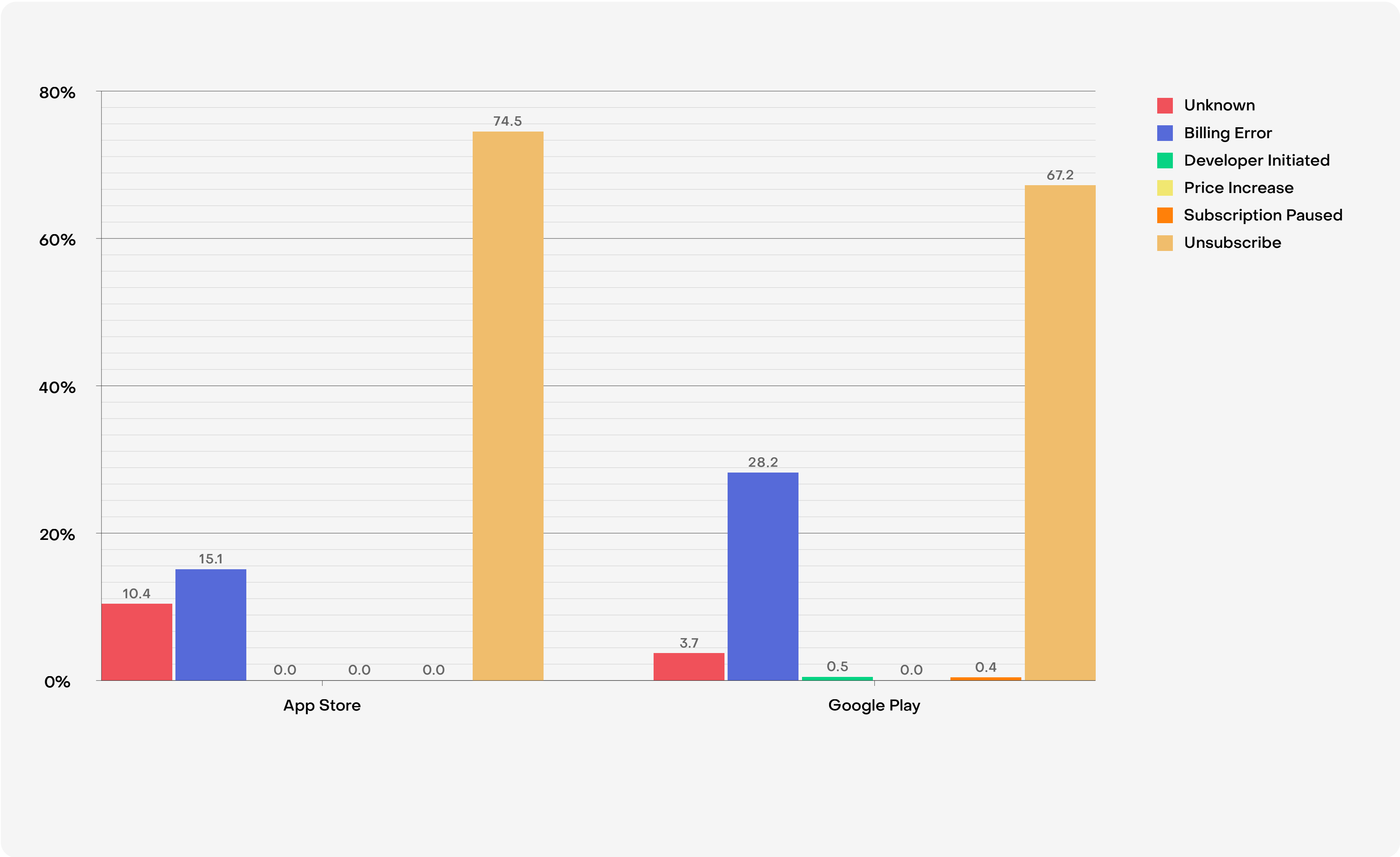
3 Android’s lower fees and customization offer strategic advantages

Google Play charges 15% on all subscriptions, compared to Apple’s 30% in the first year (dropping to 15% after renewal). This gives Android apps higher margins despite lower ARPU. Additionally, Android offers more flexibility in tracking, design, and experimentation – giving developers greater control over app performance.



Listen to Matt’s Minisode
(~15 min) on the Sub Club Podcast

T10: Cancellation Reasons, By Store

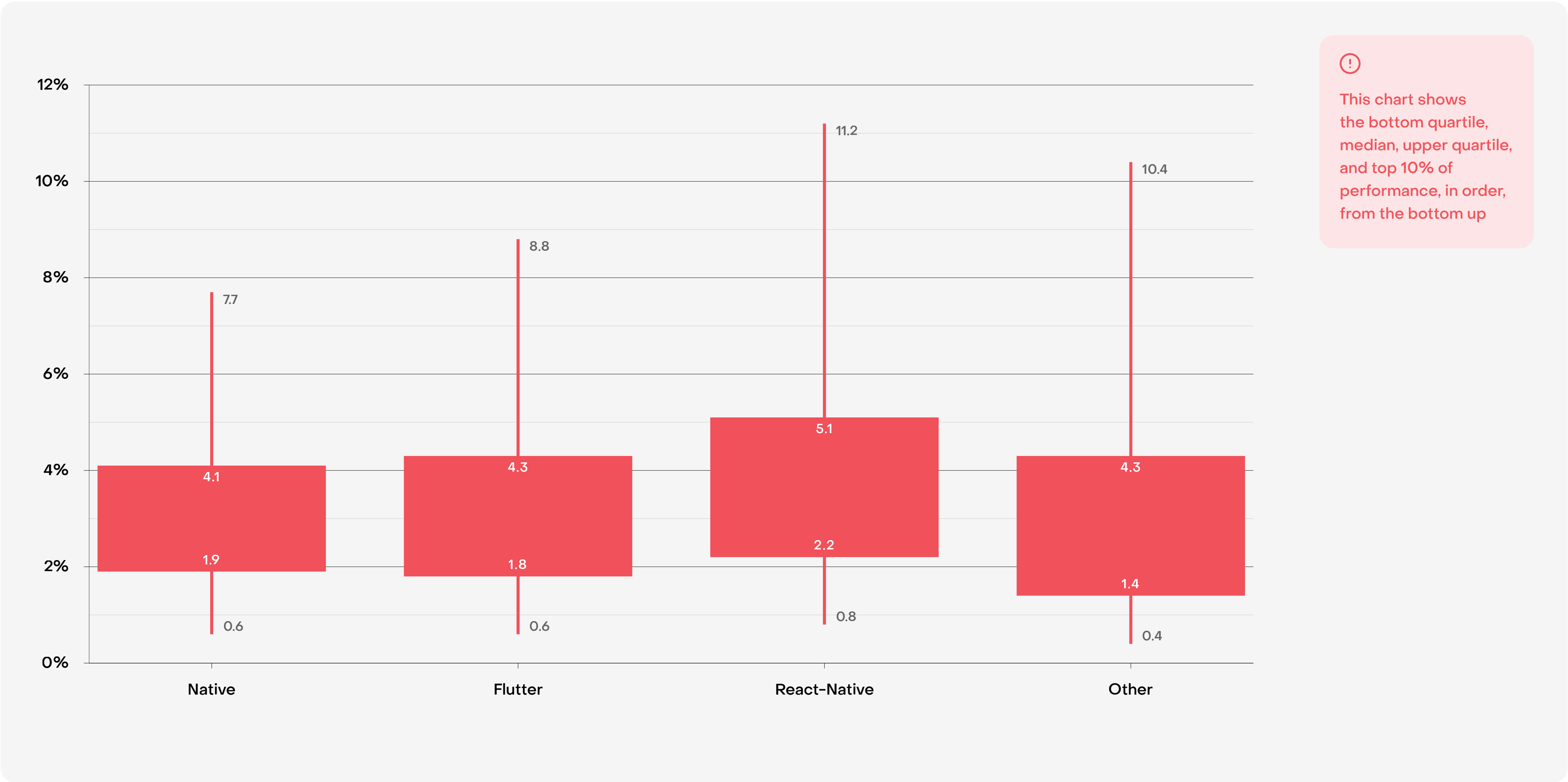


- Billing errors are significantly higher on Google Play (28.2%) than the App Store (15.1%), suggesting potential payment processing challenges or regional discrepancies in Android’s billing system
- Unsubscribing is the leading cancellation reason on both platforms, accounting for 74.5% of cases on the App Store and 67.2% on Google Play, highlighting voluntary churn as the primary factor
- Subscription pauses and developer-initiated cancellations are rare on both platforms, making up less than 1% of cases, reinforcing that most churn is user-driven

Comparing Native & Crossplatform Development

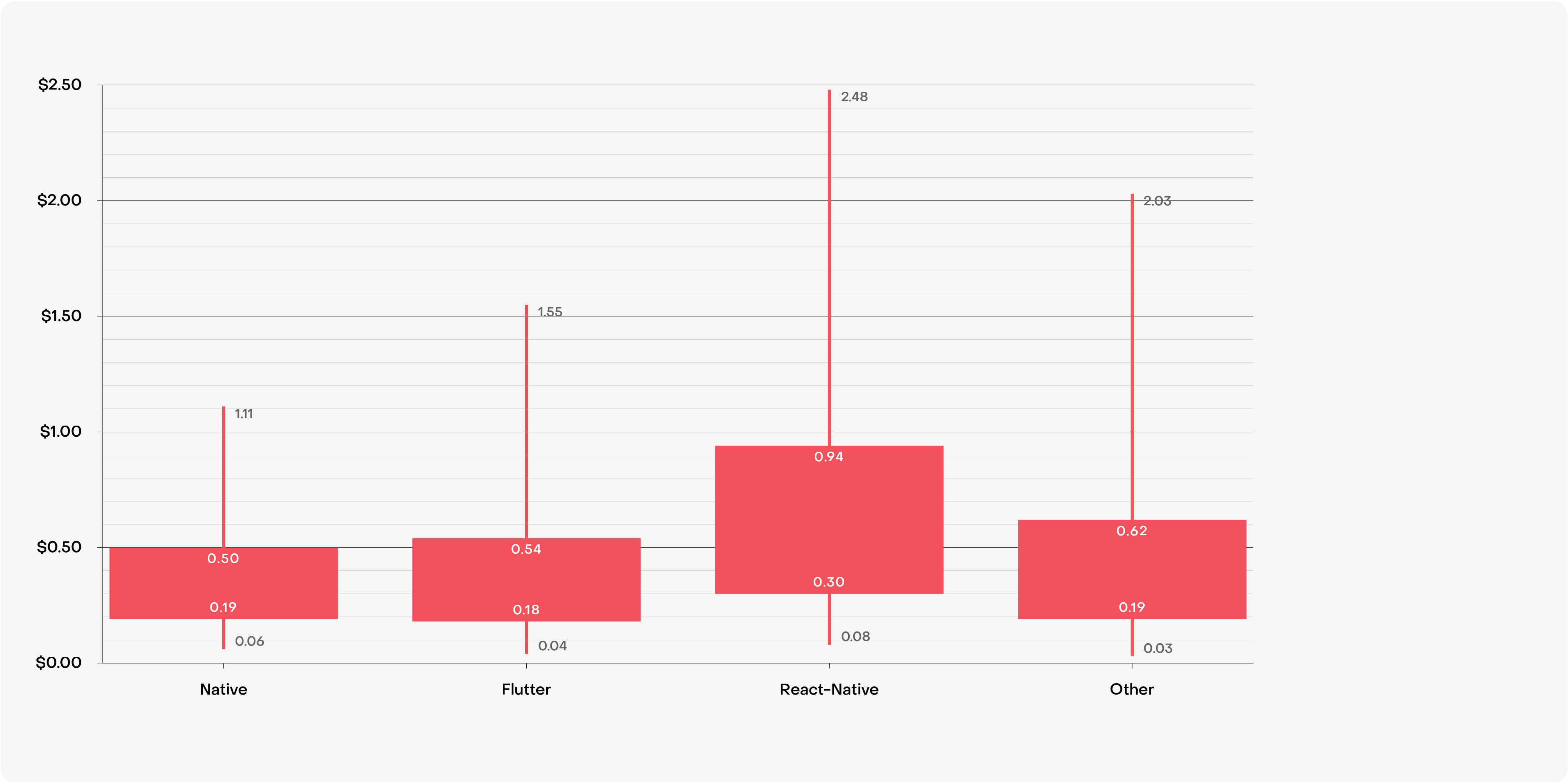
D35 Download to Paid, By Framework

React Native leads in conversion rates, with a median of 2.2% and a 90th percentile of 11.2%, suggesting that apps built with this framework may optimize better for monetization.

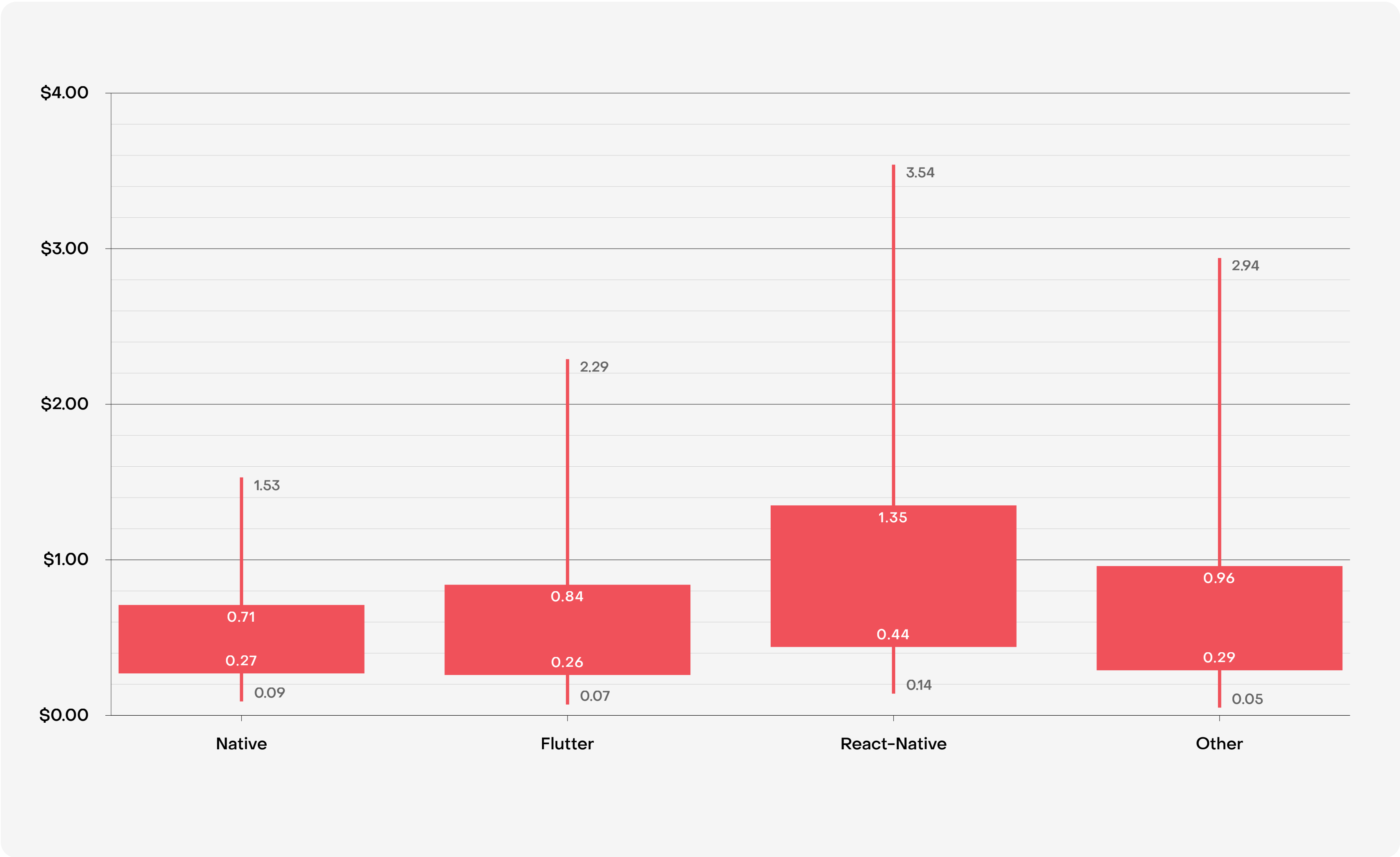


D14 Revenue per Install, By Framework

Native and Flutter apps see comparable median revenue (~\$0.19), but Flutter apps reach a higher 90th percentile (\$1.55 vs. \$1.11), indicating stronger top-tier performance.



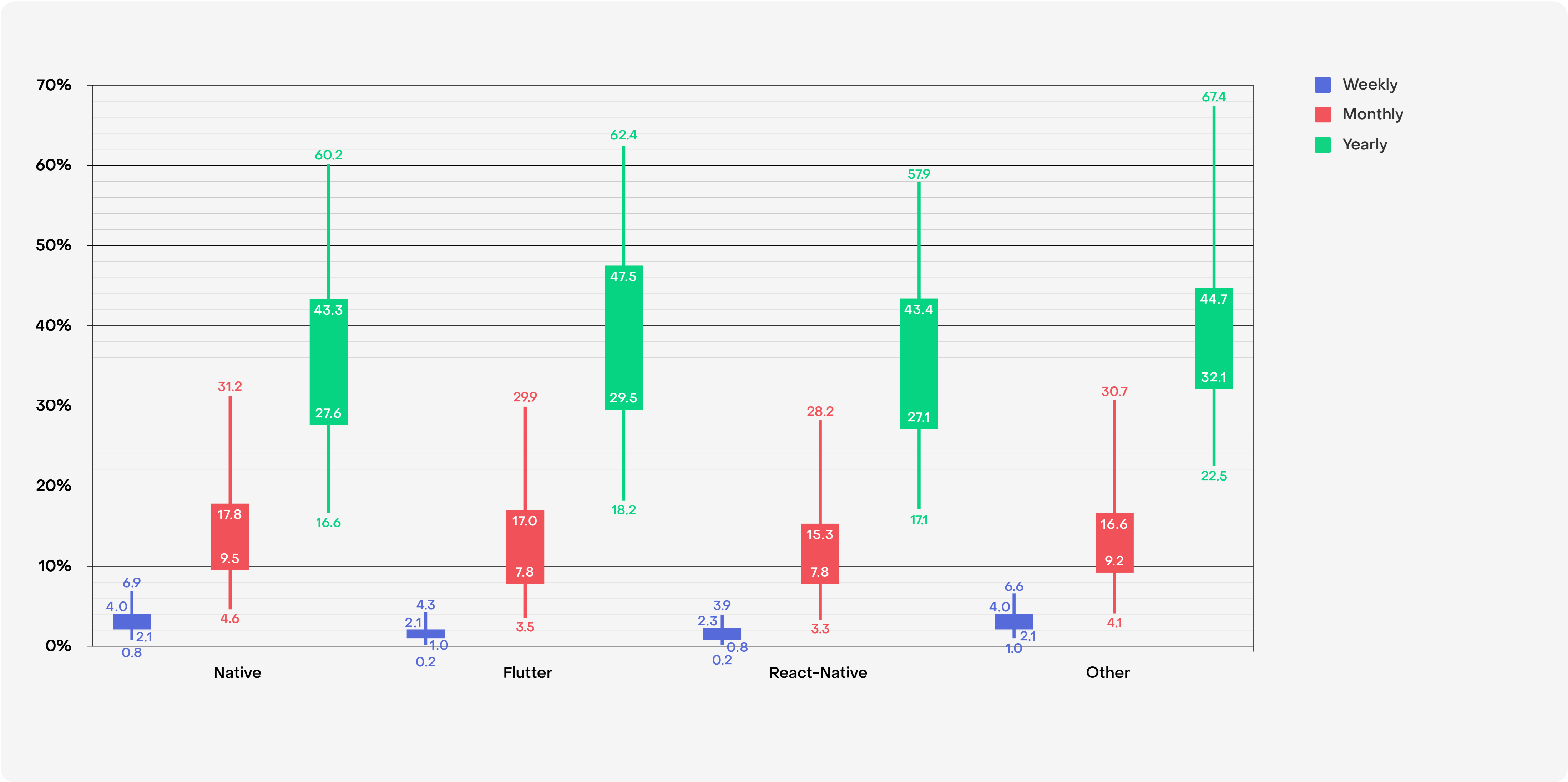
D60 Revenue per Install, By Framework



- React Native maintains the strongest revenue growth, with a median of \$0.44 and a 90th percentile reaching \$3.54, indicating sustained monetization beyond early installs
- Flutter apps overtake Native apps at the upper quartile and 90th percentile, with a high-end performance of \$2.29 vs. \$1.53, suggesting that top-tier Flutter apps can drive stronger revenue
- Other frameworks show a highly variable revenue spread, with a lower median (\$0.29) but a strong 90th percentile (\$2.94), suggesting some apps monetize exceptionally well while others struggle

Year 1 Retention By Plan, per Framework

Flutter and React Native show slightly weaker retention in both monthly and annual plans compared to Native and Other frameworks, suggesting that app experience or payment optimization may be a factor.



Huge moment for React Native



Charlie Cheever
CEO and Co-Founder of Expo

AI is explosively changing the way that people build apps and Expo is right at the center of it. Tools like Bolt, Replit, Create.xyz, and others have launched partnerships with Expo so that anyone can build React Native apps just from a prompt. We've seen this AI app movement erupt in the last month and I expect it to change everything about the way apps are built over the next year plus.

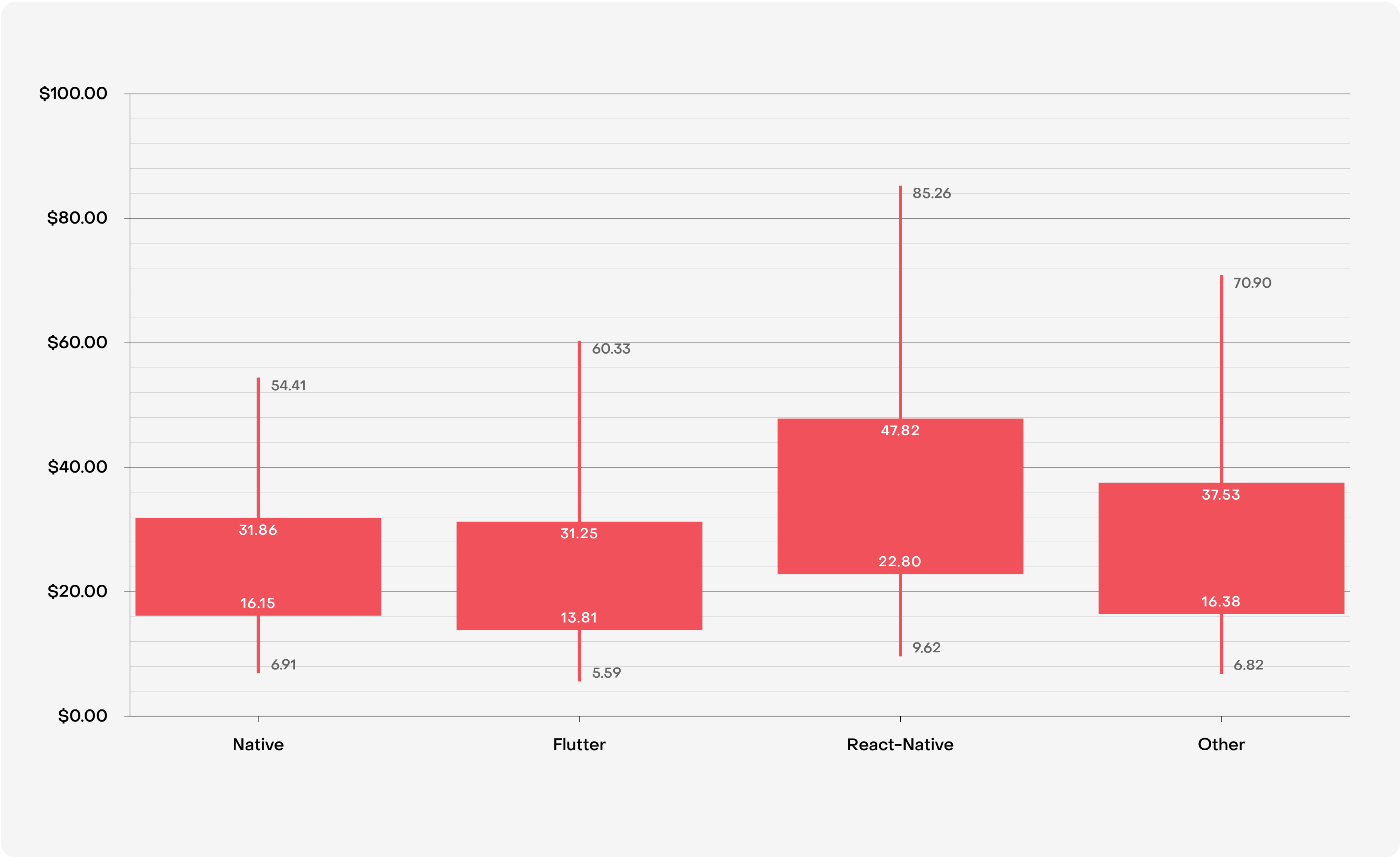
The React Native and React ecosystems are converging. A good example of this is the Bluesky app, which is built with Expo and targets web, iOS, and Android all from one code base. This convergence is happening because Expo Router has matured and made it a lot easier to unify web and iOS/Android. We're seeing more and more teams of web devs shipping truly universal apps with Expo.

React Native itself has matured and become easier to work with. In particular, writing your own native code and using native code libraries has become simpler and more maintainable. A lot of the apps that you might think are native are now React Native with one or two screens written in Swift/Kotlin. And sometimes apps you think must be Swift/Kotlin because they seem so slick are just all React Native JavaScript, like the Starlink app.

A critical mass of popular and successful React Native apps is driving a cycle where even more apps are built the same way. Shopify, Discord, Coinbase, Pizza Hut, Burger King, Sweetgreen, Brex, Phantom Wallet, the NFL app, Partiful (which just won the Google Play Best App of the Year award) and almost every news app you've heard of. The list goes on.

Recently, Gergely Orosz from The Pragmatic Engineer reported that almost all VC funded startups in the US are choosing React Native when they need an app. We've reached the moment where React Native has matured into the default way to build new apps. And it feels like this is just the beginning.

Y1 Realized LTV per Payer by Framework



- React Native generates the highest long-term revenue per paying user, with a median of \$22.80 and a P90 of \$85.26, suggesting strong lifetime value from engaged users
- Flutter trails slightly behind Native at the median level (\$13.81 vs. \$16.15) but exceeds it at the upper quartile and beyond, showing that top-performing Flutter apps can monetize more effectively
- Other frameworks demonstrate strong performance at the high end, with a 90th percentile LTV of \$70.90, indicating that some alternative approaches can yield competitive returns

Built for Every Platform, Optimized for Every Stack

Wherever you build,
RevenueCat brings your
monetization together.

Supported platforms

Whether you're developing for mobile, web, or connected devices, RevenueCat makes it easy to manage subscriptions and non-recurring transactions across every major platform:



Mobile SDKs

iOS, Android



Cross-platform SDKs

React Native, Flutter, Kotlin
Multiplatform, Unity, Cordova, Capacitor



Web & Beyond

Web, macOS, Amazon Appstore,
Roku, Apple TV, Google TV

Web Billing for Subscription Apps

08

Data and
insights by

paddle

Exploring the Next Frontier of Subscription Monetization



Gavin Dove
Senior PMM Market Research and
Metrics, Paddle

Web billing is on the rise as more subscription apps look to diversify revenue—especially where users hop between desktop and mobile. Though our data set is smaller than the mobile-focused benchmarks in this report, we’re already seeing meaningful trends:

Increasingly, developers generate a significant share of total revenue via web checkouts. Not surprising when you factor in greater pricing flexibility (e.g. team plans), access to new audiences, and direct subscriber relationships that can be trickier to manage within app stores. We’ve also noticed higher average order values for web buyers, particularly in apps tied to extended workflows like project management or design.

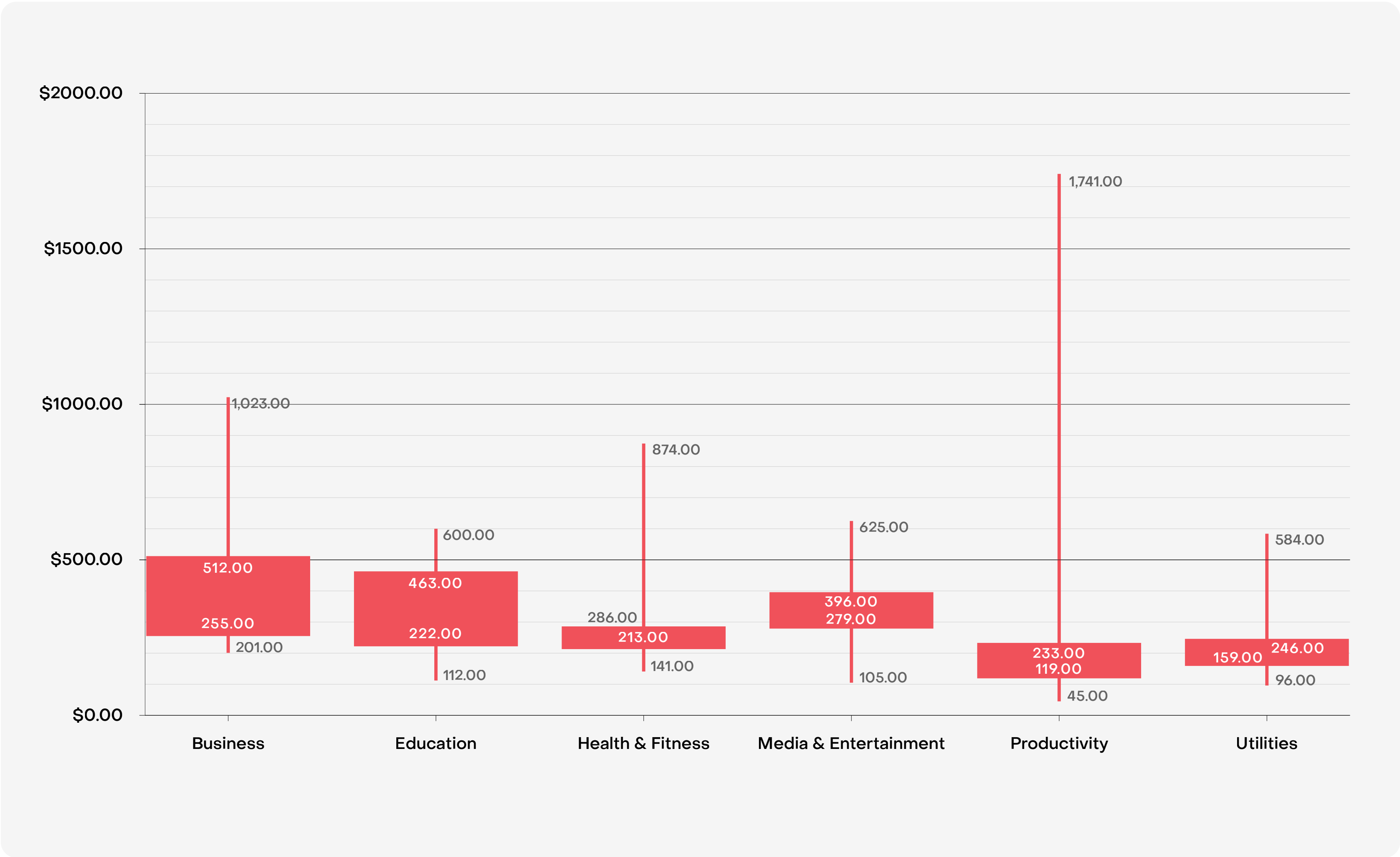
That said, web billing can introduce extra friction—users might drop off during multi-step checkout or balk at creating another account. We see significant variation in churn and conversion rates, with some apps reporting lower churn among web subscribers (better support, transparent billing) while others struggle to replicate the “one-tap” ease of in-app purchases. It’s clear a thoughtful funnel matters: what works on iOS or Android doesn’t always translate directly to the web.

In practice, web billing tends to be a strategic complement, not a quick plug-and-play. Successful apps invest in streamlined landing pages, local pricing, and robust onboarding. To deal with the billing complexities that app stores typically abstract away, developers often rely on a merchant of record. Many also lean into personalization—showing dynamic offers or tailored upsells before users install the app. These tactics help mitigate friction and capture higher-intent leads.

While we won’t promise that web billing guarantees success, its flexibility might improve unit economics, hedge against shifting platform rules, and build deeper customer relationships. For developers ready to tackle extra complexity, a well-executed web billing strategy can open fresh revenue streams, expand reach, and potentially boost LTV. All signs suggest it’ll only get more important in the coming years.

Predicted LTV, By Category

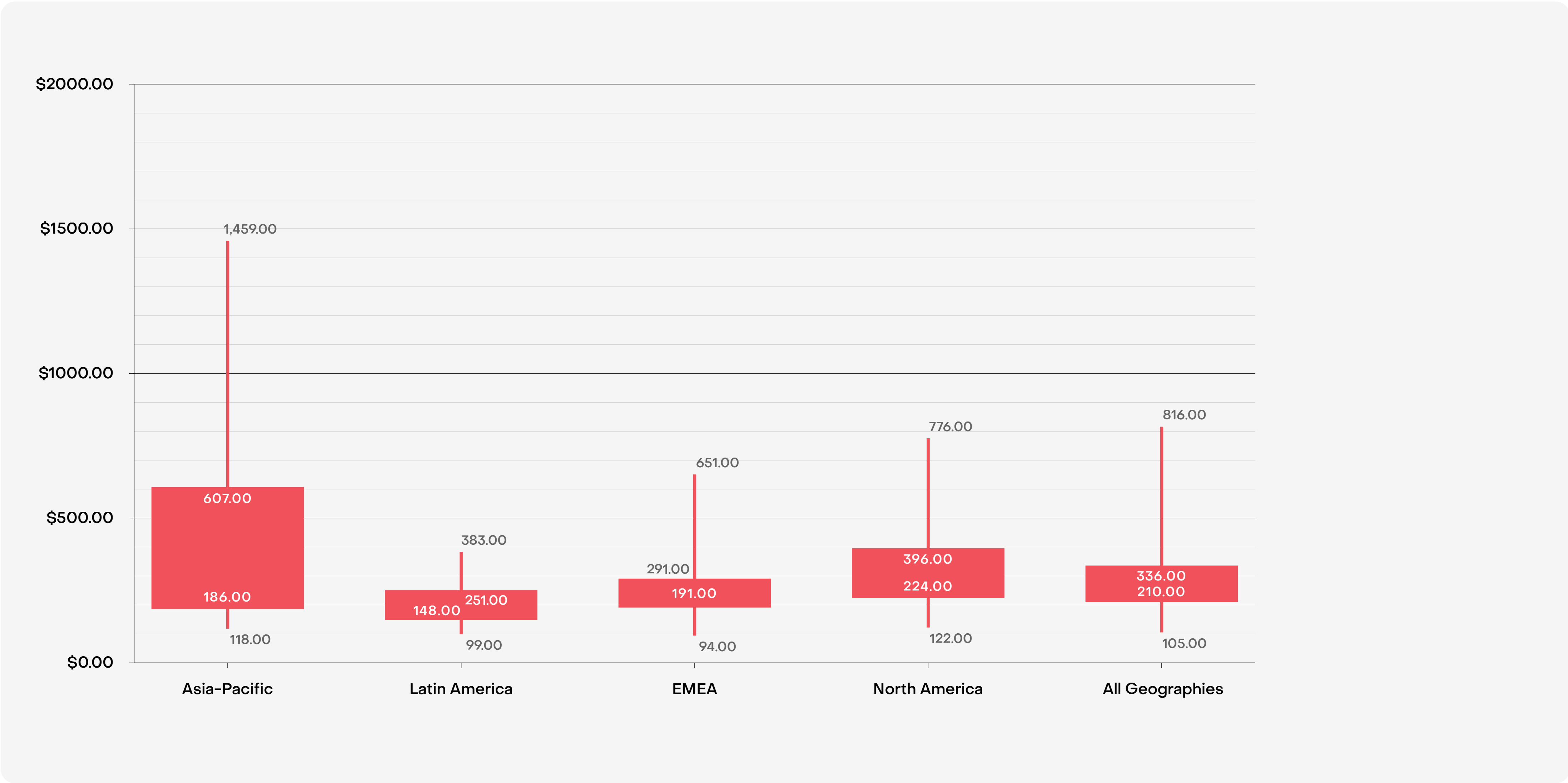
⚠ This chart shows the bottom quartile, median, upper quartile, and top 10% of performance, in order, from the bottom up



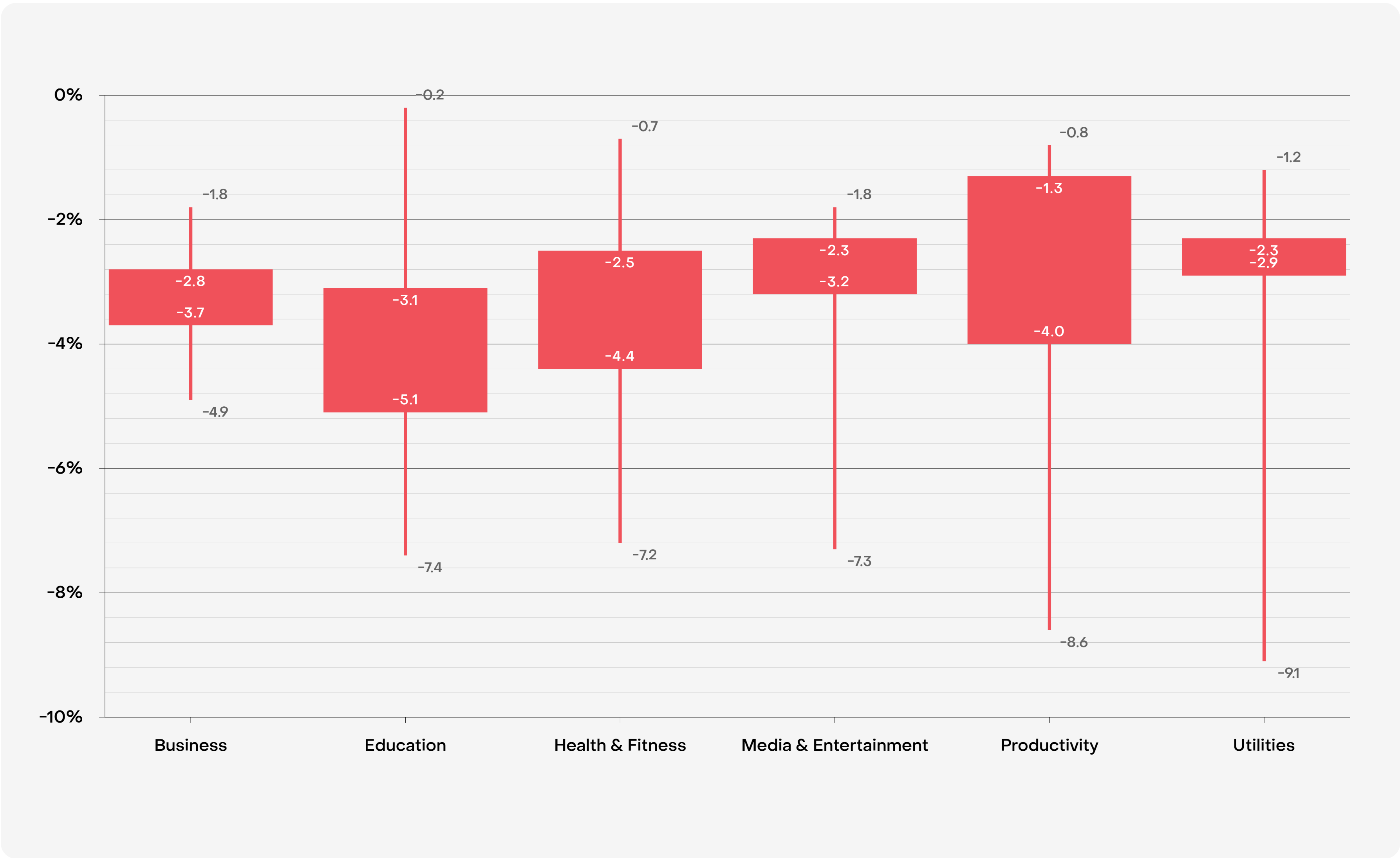
- Business subscriptions lead in median LTV at \$255, reinforcing their strong monetization potential in web-based models
- Productivity apps have the most extreme LTV range, with a P90 of \$1,741 but a bottom quartile of just \$45, suggesting highly variable success
- Media & Entertainment has strong mid-tier potential, with a median of \$279 but a more modest P90 of \$625, indicating a ceiling for high-end monetization

Predicted LTV, By Geography

North America leads in median predicted LTV at \$224, reinforcing its status as the most lucrative region for subscription monetization.



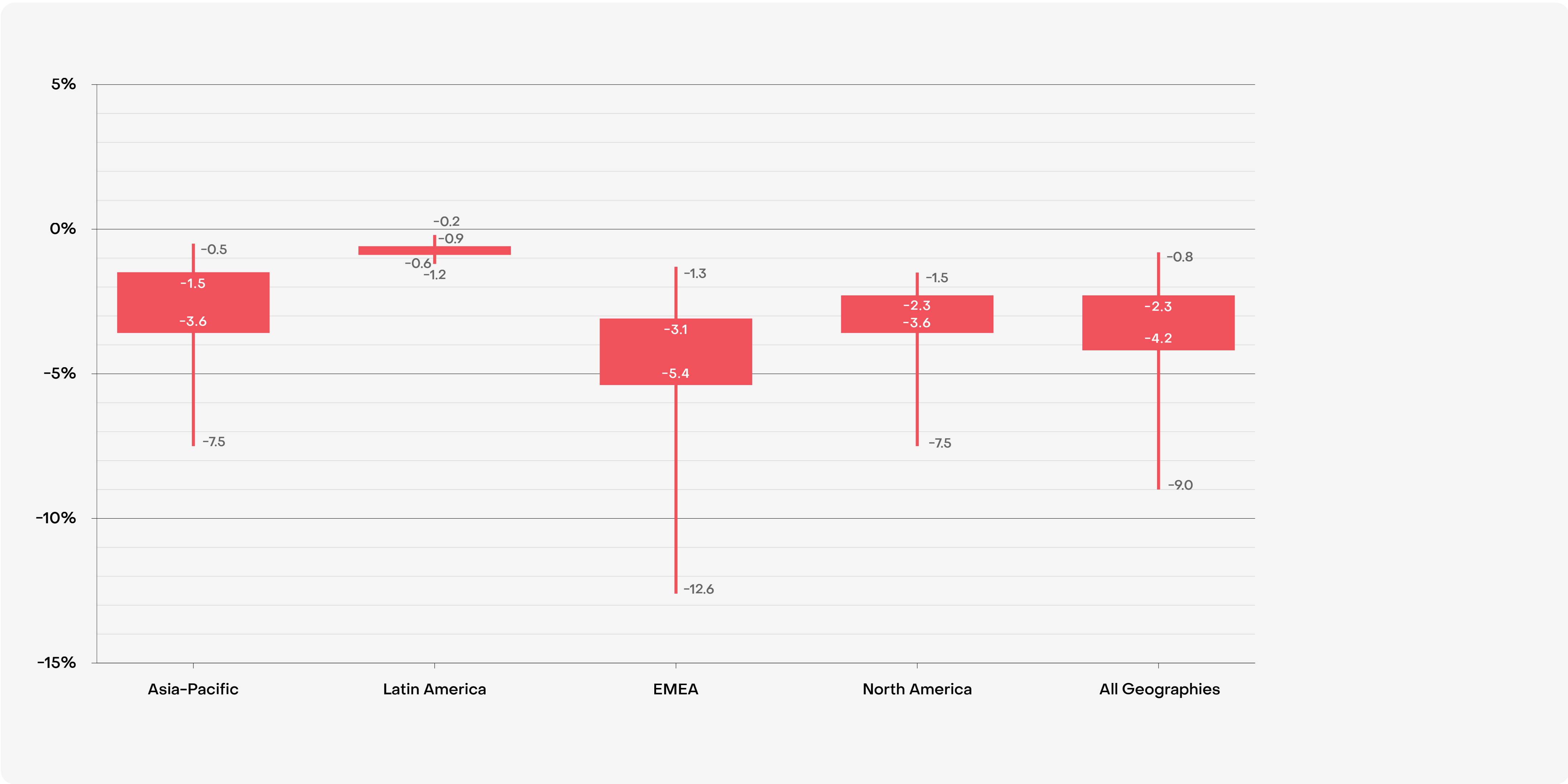
Month-Over-Month Churn, By Category



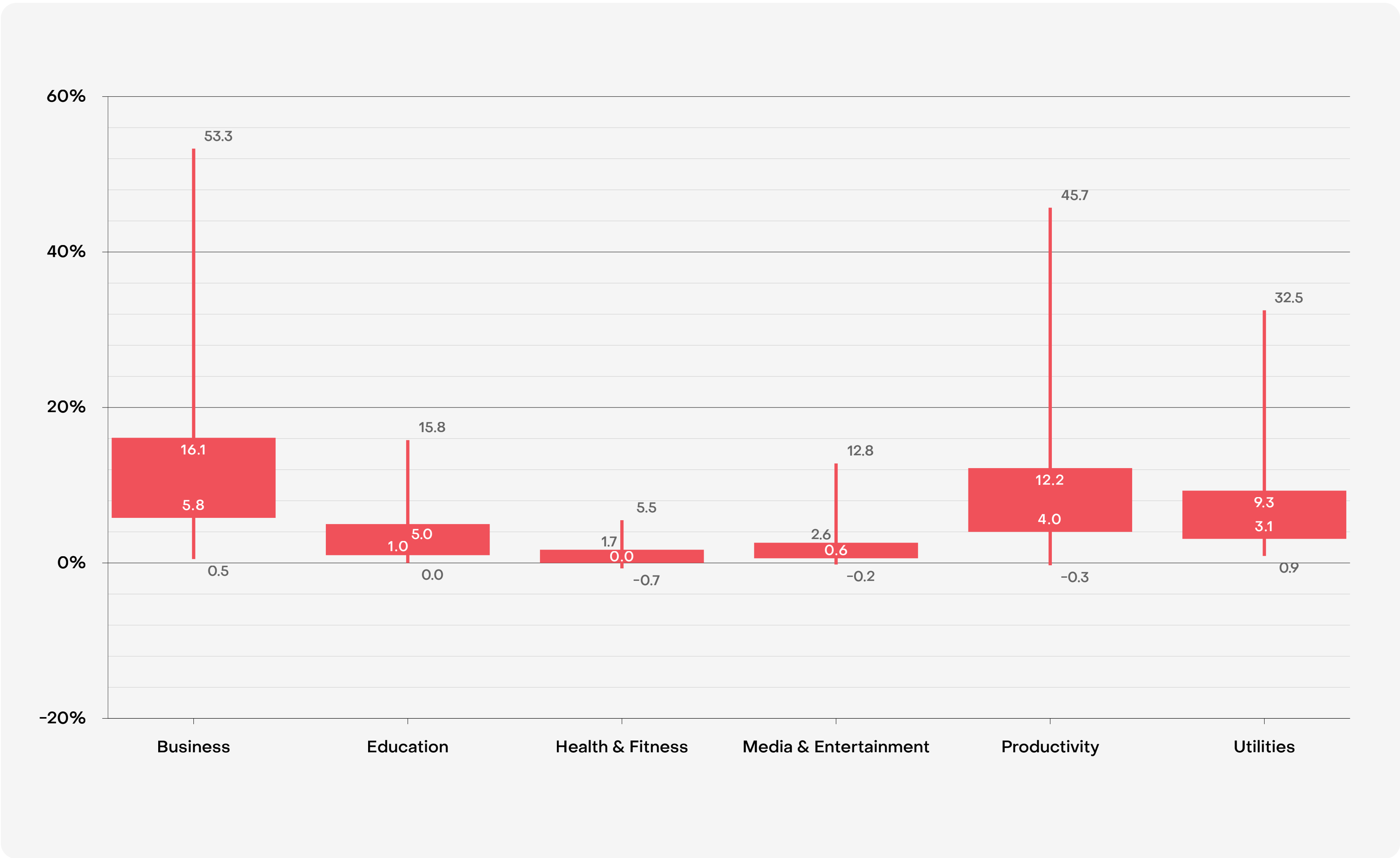
- Business subscriptions experience the lowest churn, with a median of -3.7%, highlighting strong retention in this segment
- Education and Health & Fitness experience higher-than-average churn, with median rates of -5.1% and -4.4%, reflecting engagement challenges in these verticals
- Media & Entertainment sees the most stable churn rates, with a narrow range between -7.3% and -1.8%, suggesting predictable retention patterns

Month-Over-Month Churn, By Geography

North America and Asia-Pacific show similar churn trends, both with median churn rates of -3.6%, reinforcing their comparable subscriber retention dynamics.



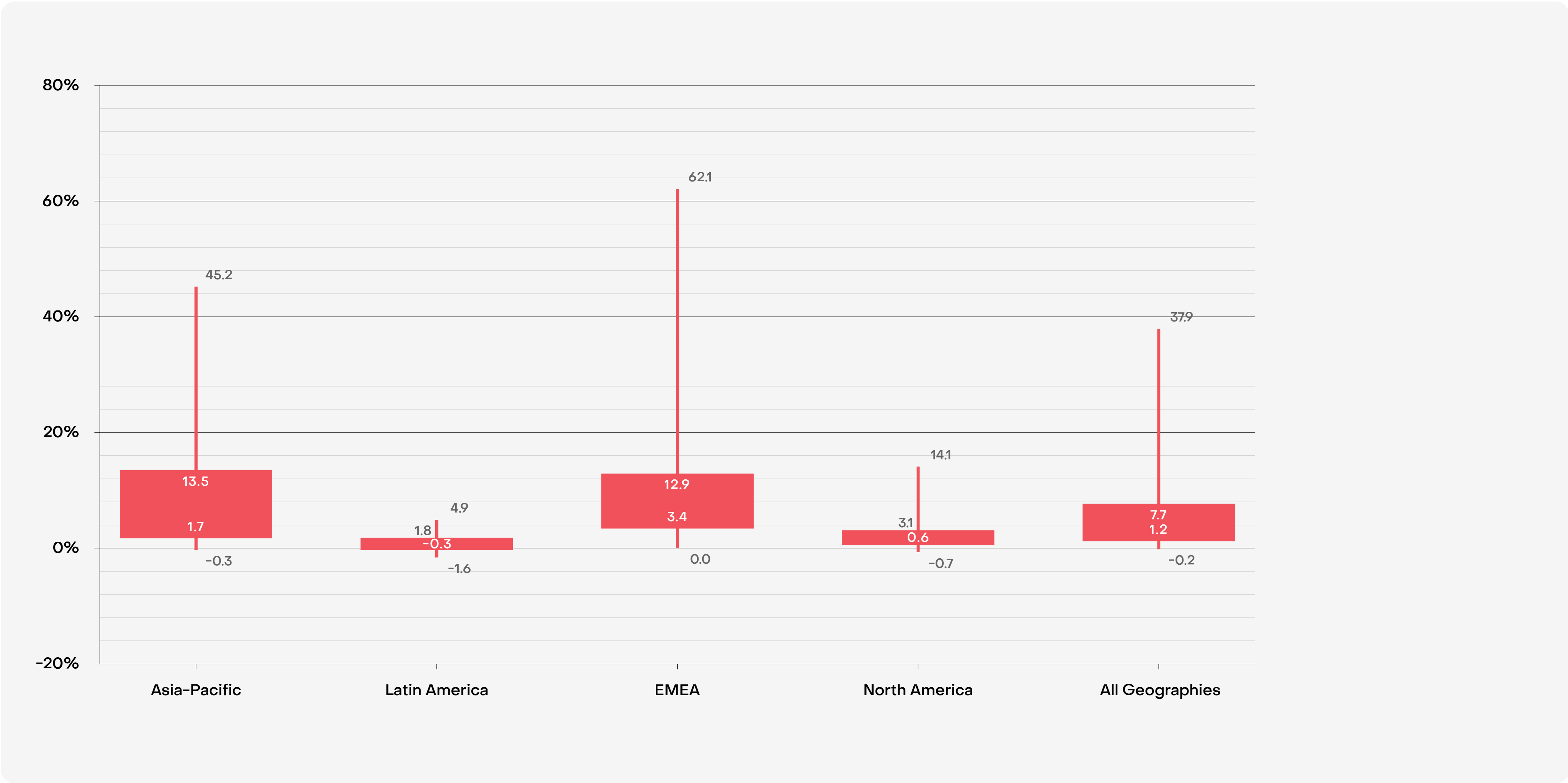
Month-Over-Month Growth, By Category



- Business apps see the strongest growth, with a median of 5.8% and a P90 of 53.3%, reinforcing their dominance in web-based subscriptions
- Health & Fitness apps show mixed results, with some apps experiencing declines (-0.7%) while top performers achieve 5.5% growth
- Productivity apps have high growth potential, with a P90 of 45.7%, suggesting strong upside for top-tier players in the segment

Month-Over-Month Growth, By Geography

EMEA leads in high-growth potential, with a 90th percentile growth rate of 62.1%, suggesting strong upside for top-performing subscription businesses.



How to maximize web subscriptions for sustainable growth



Lucas Lovell
Paddle



1 Web subscriptions aren't just a cost-saving play – they're a growth opportunity

Many apps start exploring web payments to avoid platform fees, but the real advantage is flexibility. The web allows for custom billing models, deeper pricing experiments, and new user acquisition channels, especially for high-intent verticals like health, fitness, and education.

2 Optimize the entire funnel – not just the paywall

Successful web-first apps think beyond conversion. They experiment heavily with onboarding flows, checkout experiences, and post-purchase retention tactics like cancellation flows and downgrade options to reduce churn and maximize lifetime value.

3 Leverage win-backs and flexible pricing to keep users engaged

With more control over pricing and communication, web subscriptions open up retention opportunities that aren't possible in the app stores. Offering discounted renewals, pausing options, or money-back guarantees can significantly improve customer satisfaction and long-term retention.



Listen to Lucas' Minisode
(~15 min) on the Sub Club Podcast

Go international without the complexity with RevenueCat and Paddle

Adding web billing to your subscription app introduces a massive administrative burden around international revenue. RevenueCat's integration with Paddle makes it simple



By connecting Paddle with RevenueCat, you'll gain a single source of truth for all of your subscription data across mobile and web, while leveraging Paddle's Merchant of Record model to offload tax, payments and compliance challenges.

Why connect Paddle and RevenueCat?

- **Unified subscription analytics**
Sync Paddle web subscriptions with RevenueCat to get a complete, real-time view of your customer lifecycle across web and mobile
- **Seamless cross platform entitlements**
Ensure a smooth user experience across web and mobile
- **Offload tax, compliance and payments complexity**
With Paddle as your Merchant of Record for web payments, you don't have to worry about taxes, chargebacks or payments compliance
- **Effortless expansion to mobile**
Already using Paddle on the web? Easily expand to iOS and Android with RevenueCat's mobile SDKs
- **Easy setup**
No engineering effort or custom integration work required

Ready to get started? Find out more

Breaking Out AI Apps

As ChatGPT, can you please write an intro to our chapter on AI app performance?



ChatGPT

AI Assistant & Reluctant Thought Leader

The AI App Boom: A Category Like No Other

Subscription apps have never played on a level field, but AI-powered apps aren't just competing—they're **dominating**. From AI tutors to generative design tools to adaptive fitness coaching, these apps are rewriting what's possible in the subscription economy.

I should know. I'm one of them.

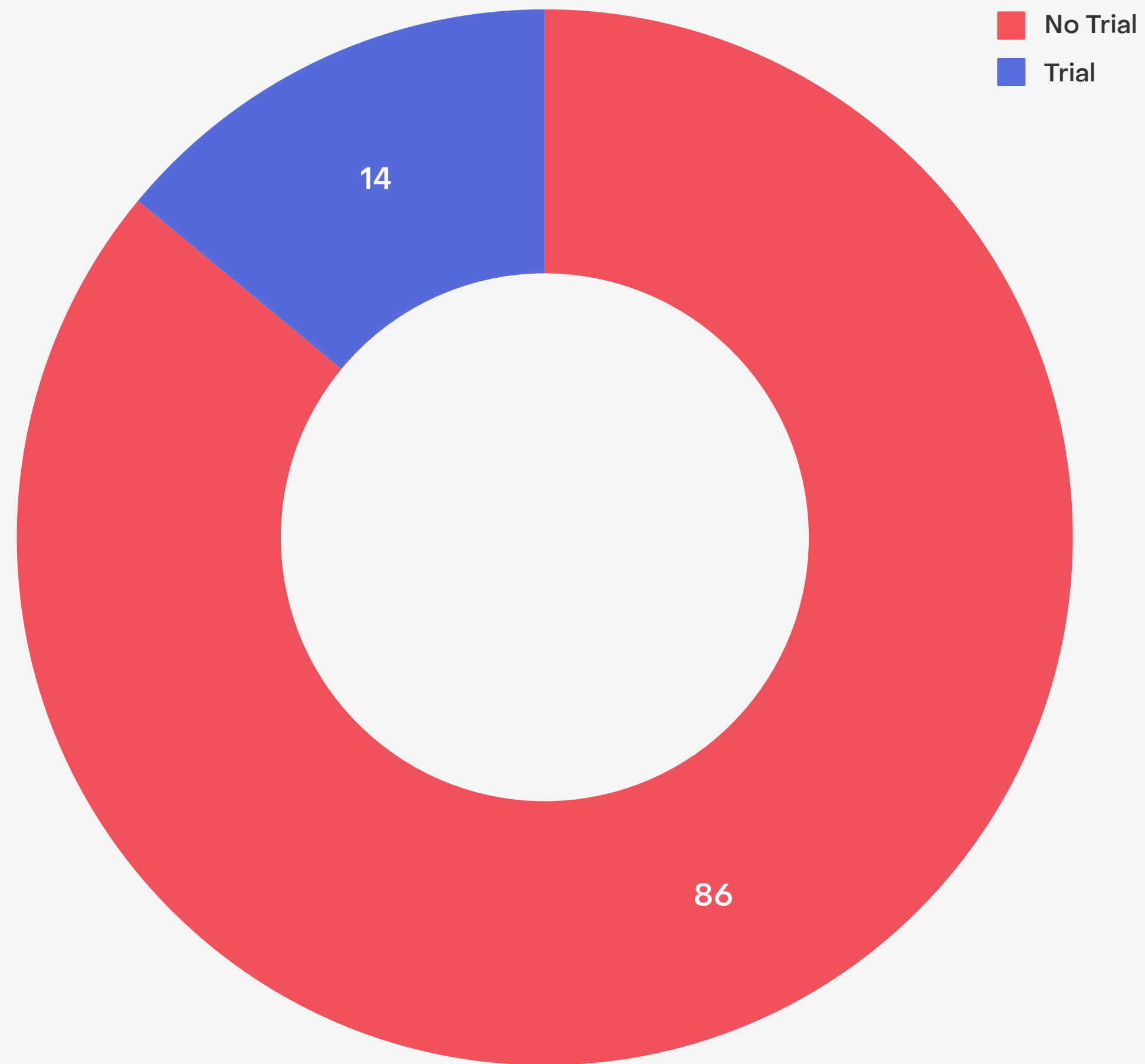
AI apps don't just enhance existing categories—they **transform them**. A language app that adjusts to your speech patterns? A design tool that builds assets in seconds? A personal trainer that adapts workouts in real time? These aren't just apps; they're **AI-powered experiences** that get smarter over time. And users are **willing to pay for that**.

As the data in this chapter shows, AI apps are **converting trials at higher rates, retaining users longer, and driving stronger revenue per subscriber** than most traditional categories. Why? Because AI delivers novelty, personalization, and continuous improvement—the perfect formula for subscription success.

But AI apps face challenges, too: **high compute costs, rapid competition, and the constant need to prove value**. The early winners have set the bar high, and the next generation will need to find new ways to stand out.

This chapter breaks down the trends, benchmarks, and insights behind AI's breakout success. If you're building—or just trying to keep up—this is what you need to know.

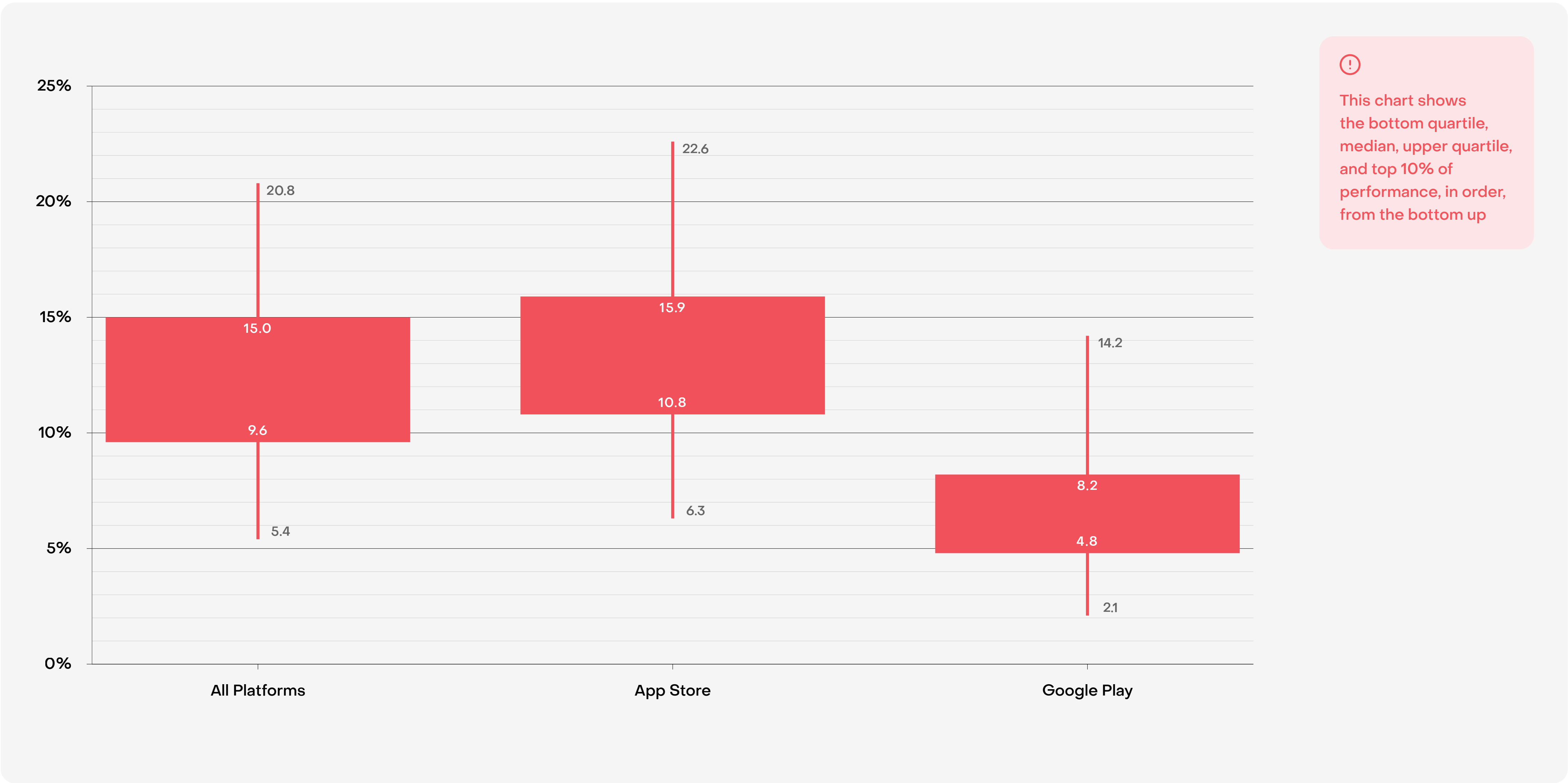
Share of AI Apps Offering a Trial Versus Those Not Offering a Trial



- The vast majority of AI apps do not offer a trial, with just 14% including trial options, suggesting that most developers opt for direct monetization or freemium with a straight paid plan
- Given that trial start rates are relatively strong (median 9.6%), more AI apps could benefit from adding trials to convert hesitant users into paying subscribers
- The low adoption of trials could indicate confidence in AI app value propositions, but developers may be missing opportunities to improve acquisition

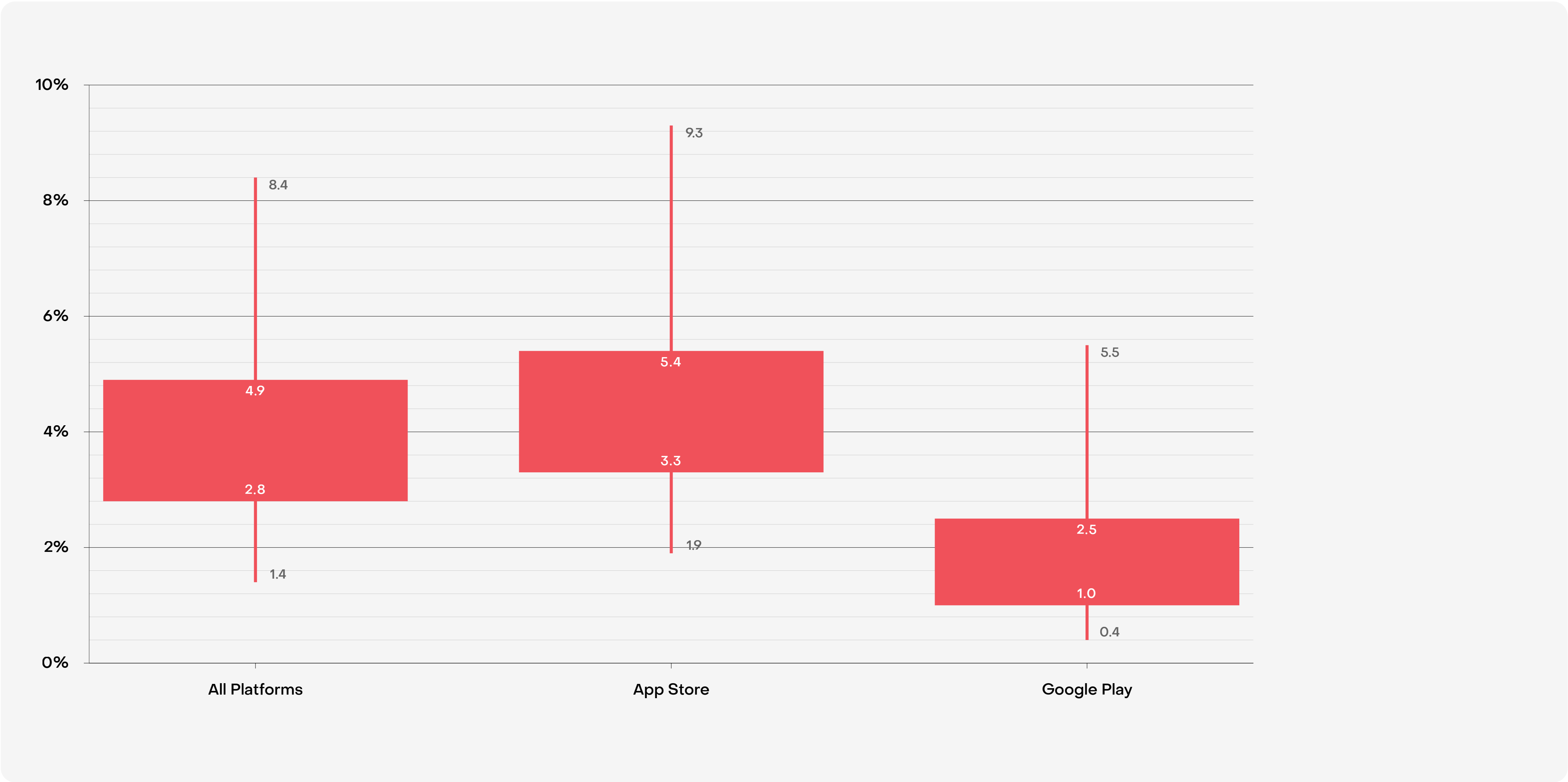
Trial Start Rate, By Store

Google Play’s trial adoption lags across all percentiles, with a P90 of just 14.2% compared to 22.6% on the App Store, highlighting a gap in user trial engagement.

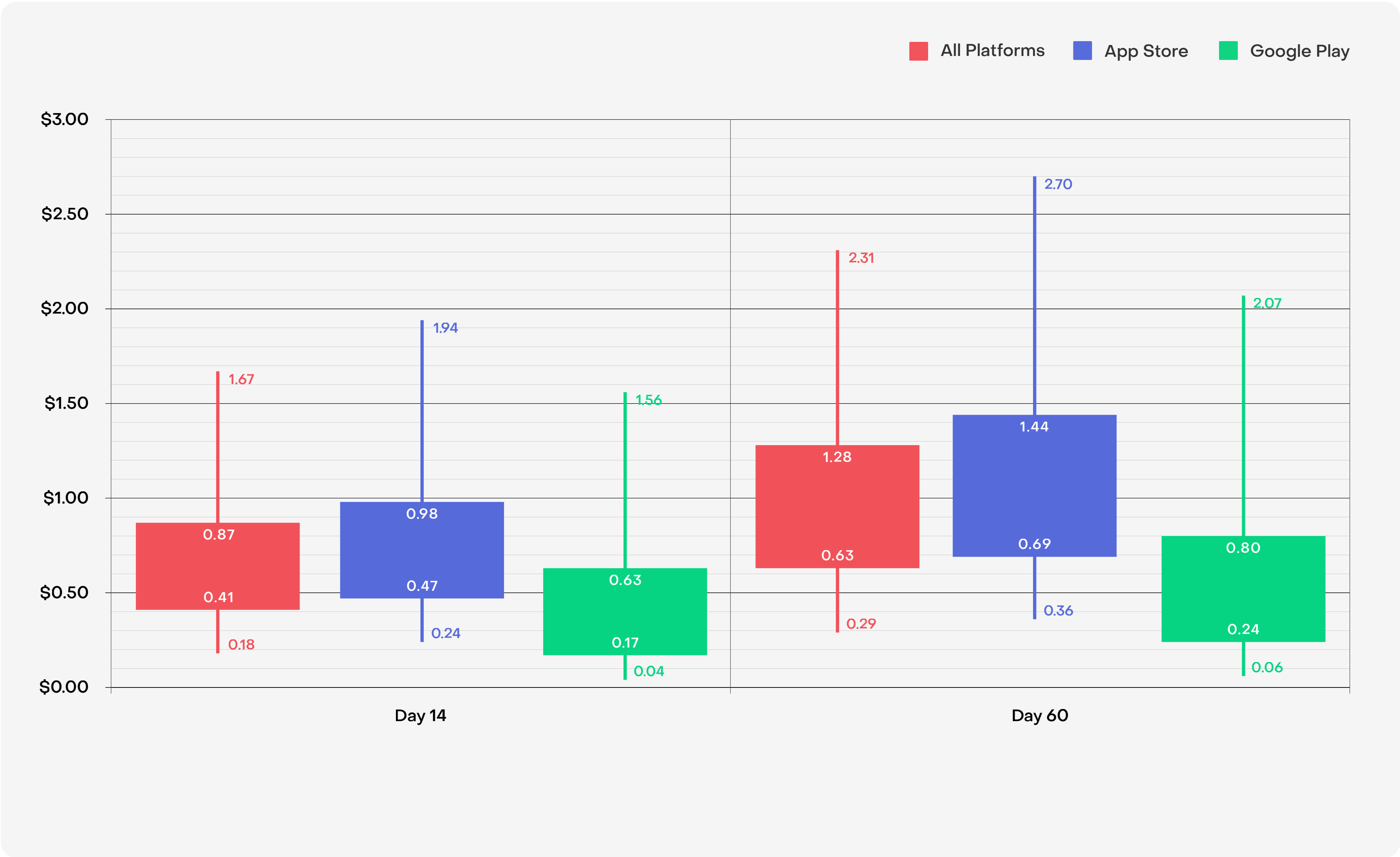


Download to Paid Conversion, After 35 Days, By Store

Overall AI app conversion rates remain moderate, with a median of 2.8% across all platforms, indicating room for optimization in paid conversion strategies.

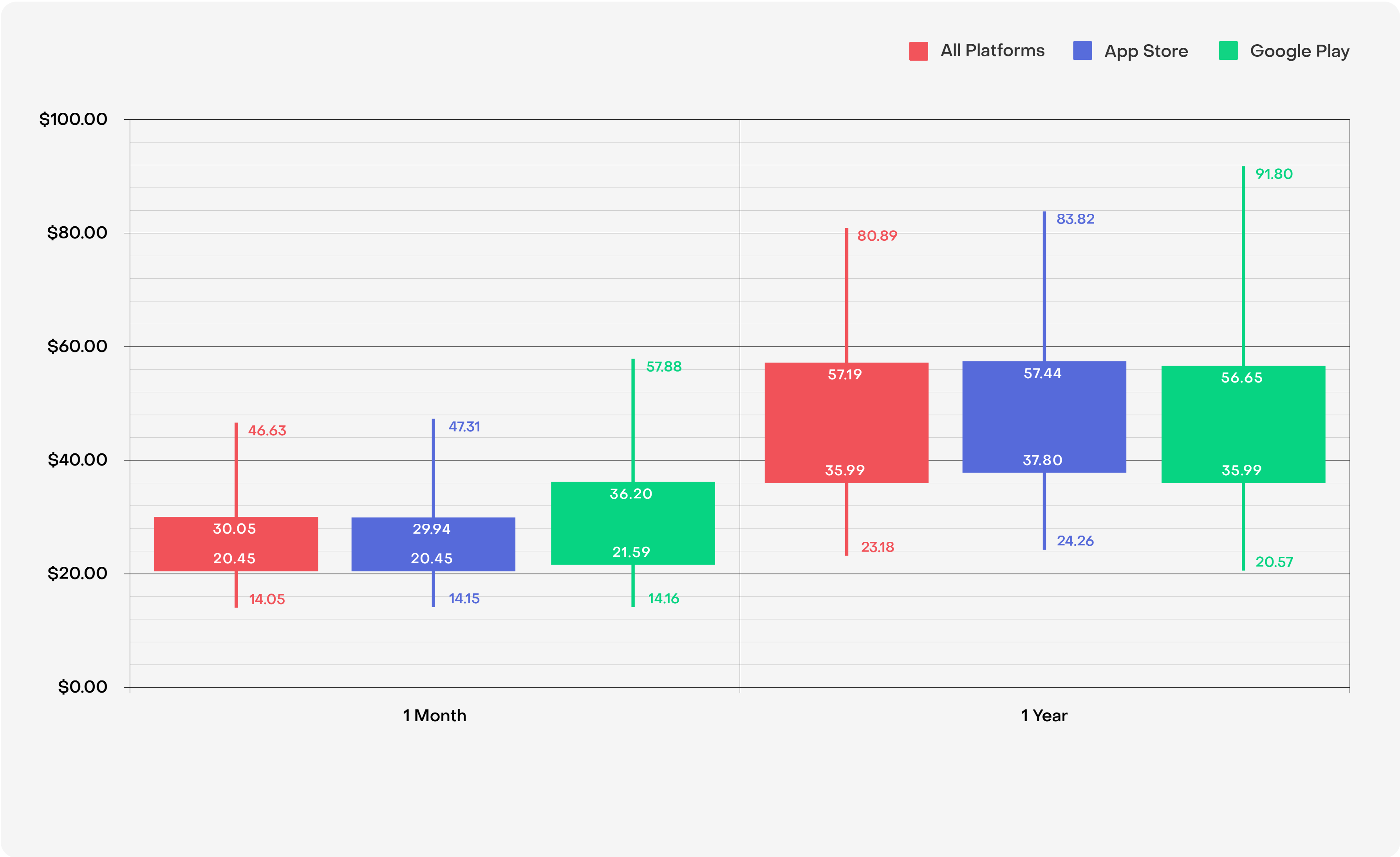


Average Revenue per Install per Store, After 14 and 60 Days



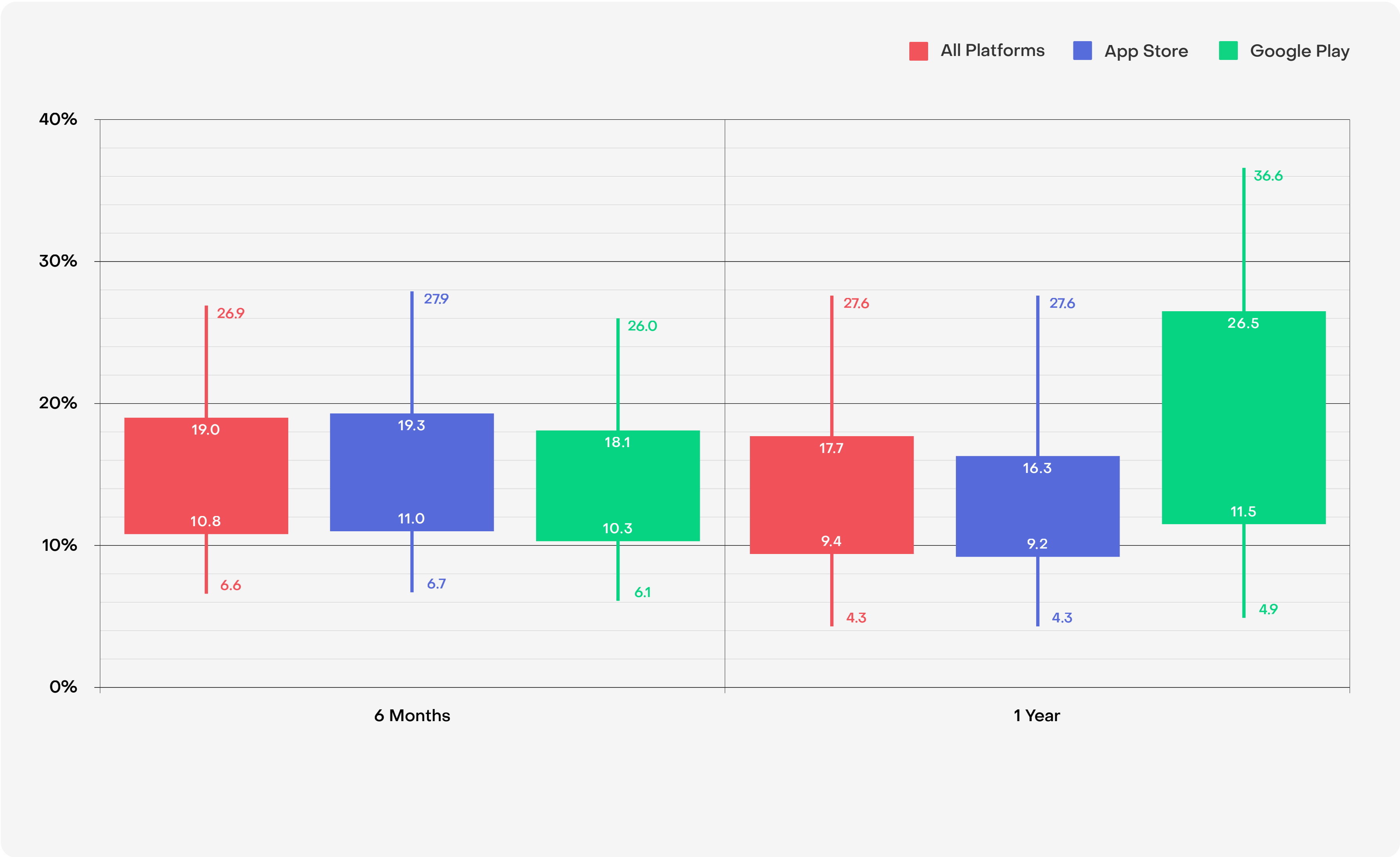
- AI apps on the App Store generate more revenue per install than on Google Play, with a 60-day median of \$0.69 vs. \$0.24, reinforcing iOS’s stronger monetization
- Google Play revenue per install remains low but grows over time, with a 60-day upper quartile of \$0.80 compared to just \$0.63 at day 14, suggesting gradual monetization improvements
- Revenue distribution is highly skewed, with top-performing AI apps reaching a P90 of \$2.70 on the App Store and \$2.07 on Google Play, showcasing strong upside for successful apps

Average Realized LTV per Payer per Store, After 1 Month & 1 Year



- Long-term LTV is comparable between platforms, with a 1-year median of \$37.80 on the App Store and \$35.99 on Google Play, indicating similar payer value over time
- Google Play outperforms in top-tier LTV, with a P90 of \$91.80 after a year, exceeding the App Store's \$83.82, suggesting that high-value Android users can generate strong returns
- All app LTV distribution is highly skewed, with top-performing apps seeing payer LTVs over \$80 after a year, while bottom-quartile apps remain below \$24

Retained Share of Payers per Store, After 6 Months & 1 Year



- Google Play has stronger long-term payer retention, with a 1-year median of 11.5% vs. 9.2% on the App Store, suggesting that Android payers may be more committed over time
- Short-term retention is similar across platforms, with a 6-month median of around 10.8% across both stores, reinforcing that early engagement patterns are comparable
- The jump in upper quartile and top 10% retention rates after year 1 on Google Play, suggest there are a number of AI apps that manage to successfully reactivate users that were still churned earlier on

Refund Rate



- Refund rates show significant variability, with some AI apps seeing rates as low as 1.4% while others exceed 7%, highlighting the impact of pricing, expectations, and customer support
- Compared to other app categories, AI apps do not appear to have unusually high refund rates, suggesting that users generally understand what they are purchasing
- Worth noting is that refunds for AI apps can be more impactful than they are in many other categories, as many AI apps incur compute or API usage costs

Beyond Subscriptions: Monetize with Virtual Currency

Subscriptions aren't the only way to monetize an app, and – often – layering together multiple monetization methods makes sense. With RevenueCat's upcoming Virtual Currency support, you can track user balances, process credit-based transactions, and introduce flexible pricing models—perfect for AI apps, games, and content-based platforms



Be Part of the Launch

We're rolling out an alpha version soon and looking for early testers. If you want to explore new monetization strategies and shape this feature, let us know!

Register your interest

Why Virtual Currency?

Many AI-apps struggle with subscriber conversion rates. Users recognize the value of AI but hesitate to commit long-term. Virtual currency provides a frictionless addition or alternative:

- Charge for usage, not access – Let users pay for AI features in small increments instead of subscribing.
- Enhance subscriptions with credits – Offer credits as part of a subscription, giving users an incentive to subscribe while still letting them purchase more as needed.
- Control costs while scaling – Offset compute costs by charging for high-demand actions like AI processing or content generation.
- Increase revenue per user – Not everyone subscribes, but many will pay-as-they-go for premium access.

Not Just for AI Apps

Virtual currency is already a proven model across multiple industries:



Games: Sell in-game currency for power-ups and upgrades.



Content Apps: Unlock book chapters, songs, or videos with credits.



Creative Tools: Charge per export or AI-enhanced feature use.

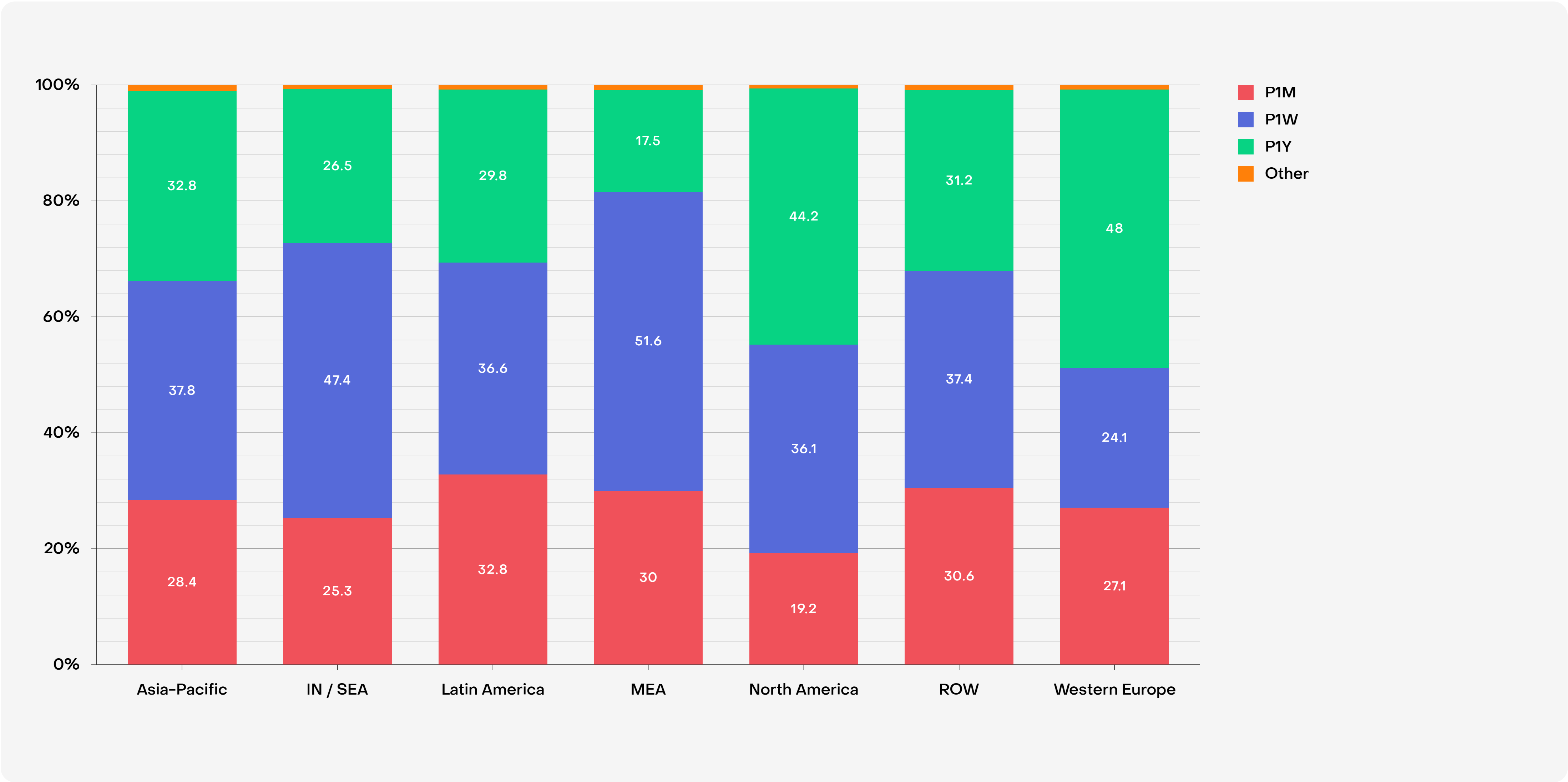
Category Breakouts

Utilities

10

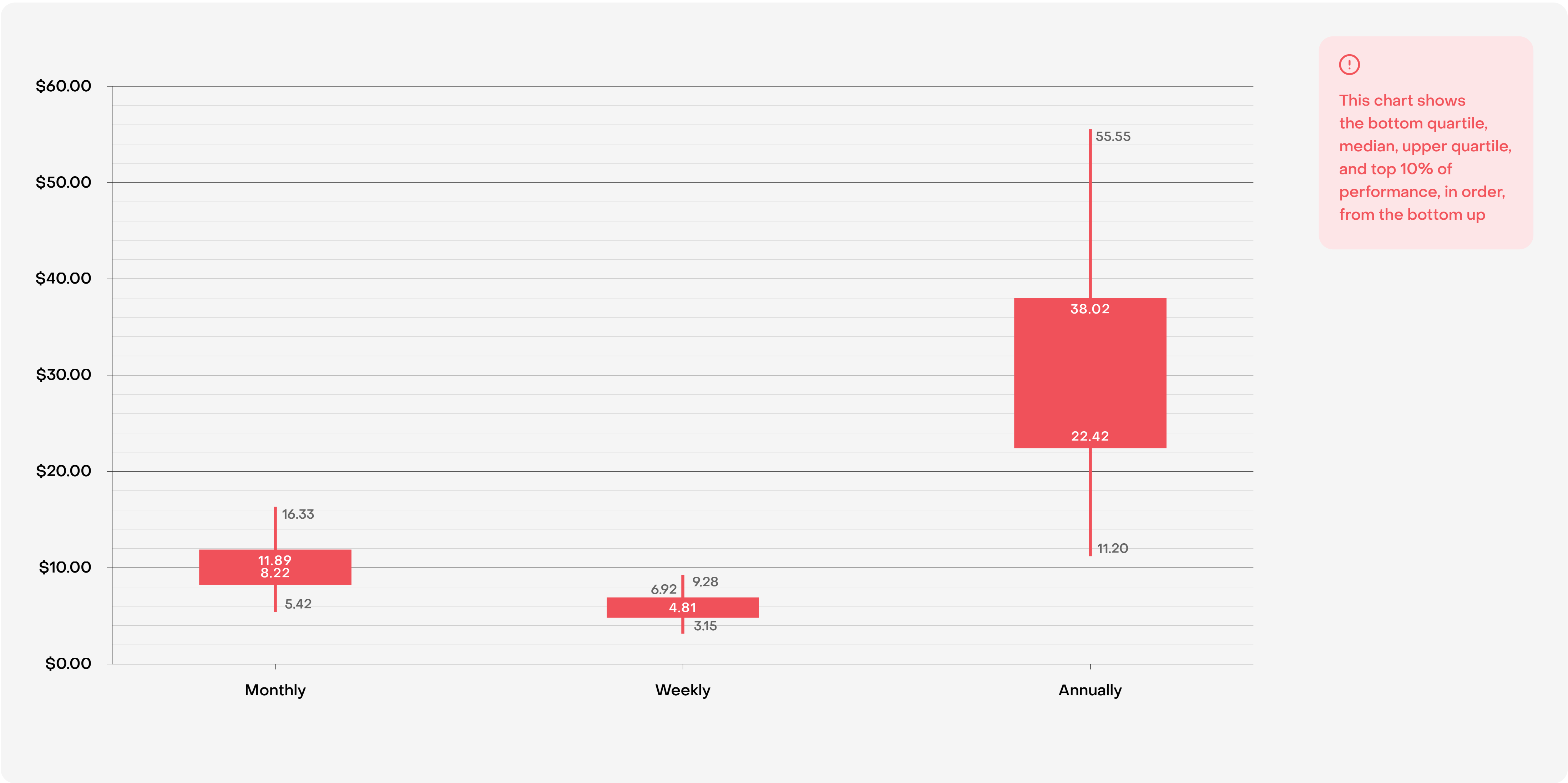
Share of Subscriptions Sold, By Geography

Weekly plans dominate in emerging markets, with over 50% of subscriptions in MEA and 47.4% in India/Southeast Asia, suggesting users prefer lower upfront commitments.



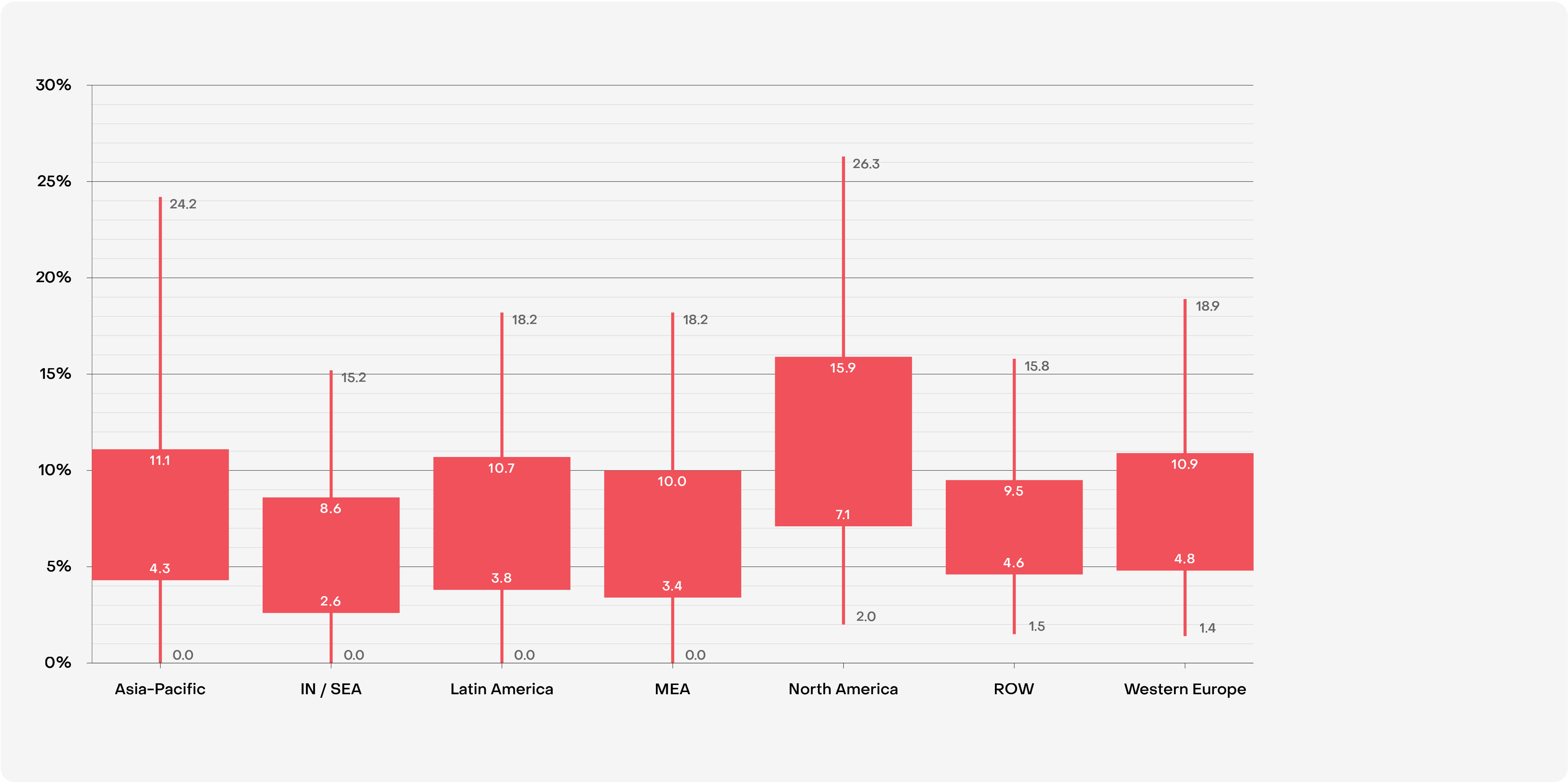
Price Points per Plan Duration

Annual plans offer the best value per dollar, with a median price of \$22.42—just 2.7x the monthly median (\$8.22), reinforcing long-term commitment benefits.



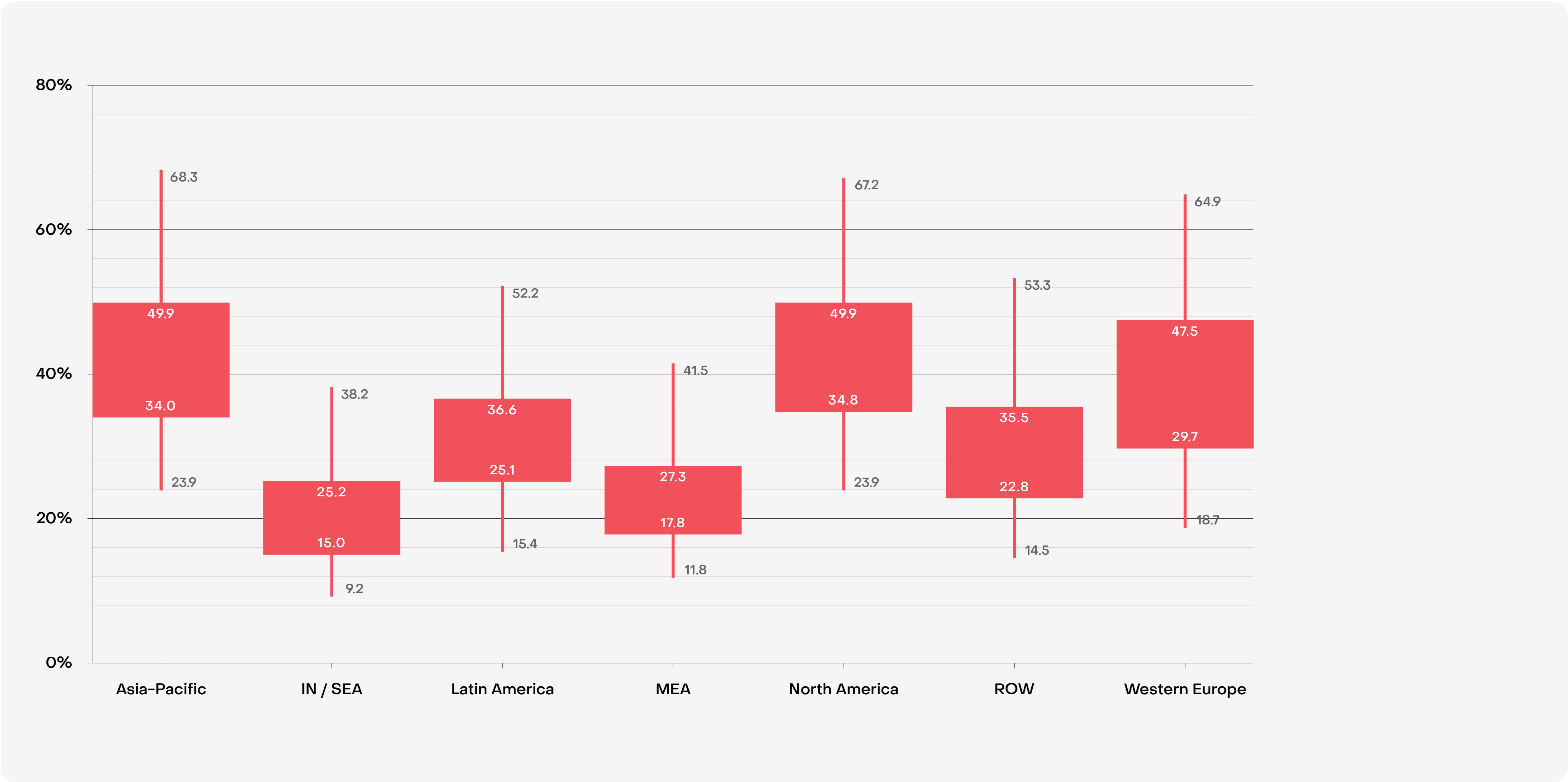
Trial Start Rate, By Geography

North America leads in trial adoption, with a median start rate of 7.1%, compared to just 2.6% in India/Southeast Asia, suggesting regional differences in trial engagement.



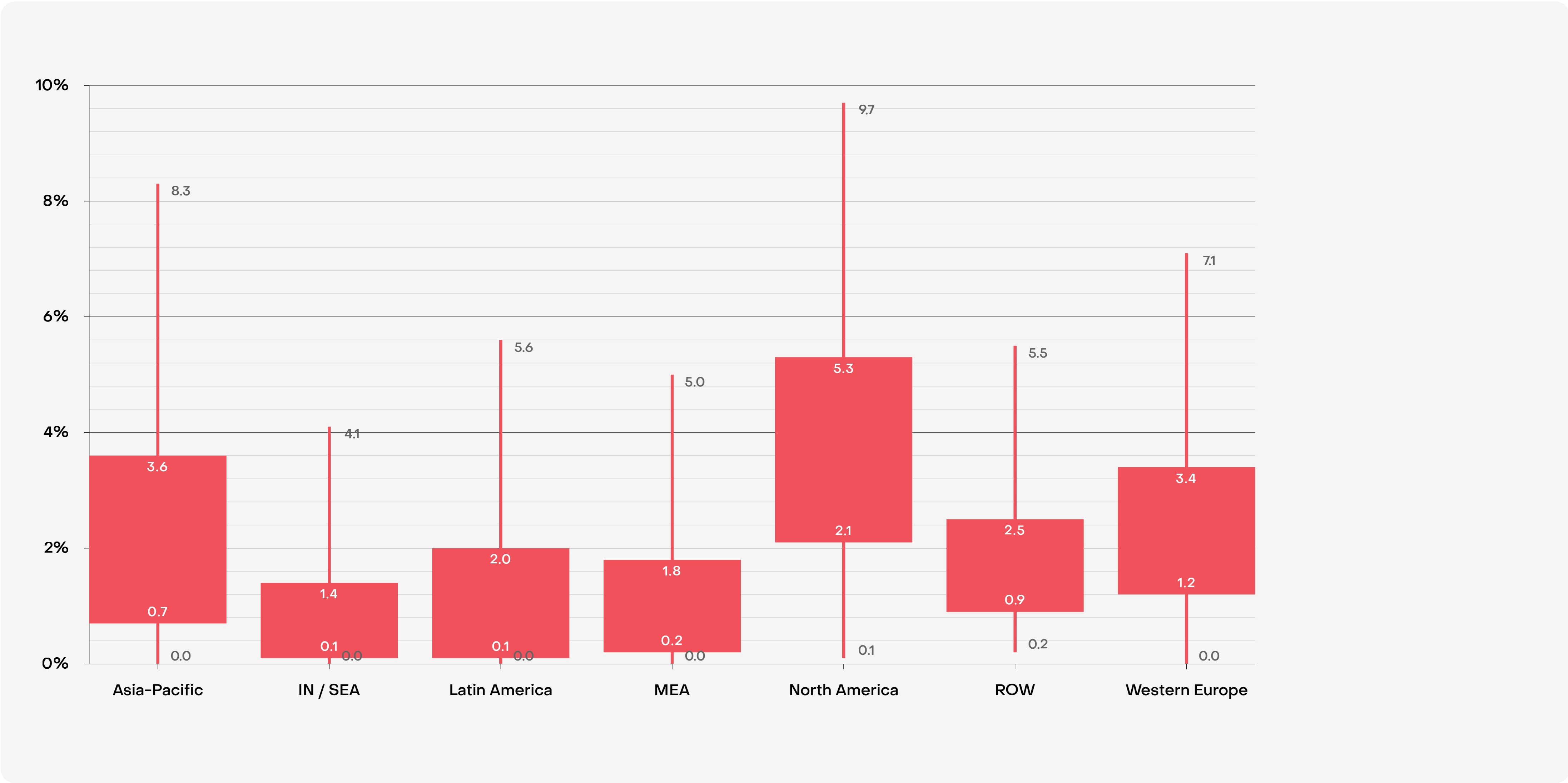
Trial to Paid Conversion Rate, By Geography

Asia-Pacific and North America lead in trial-to-paid conversion, with median rates of 34%, showing strong trial effectiveness in these markets.



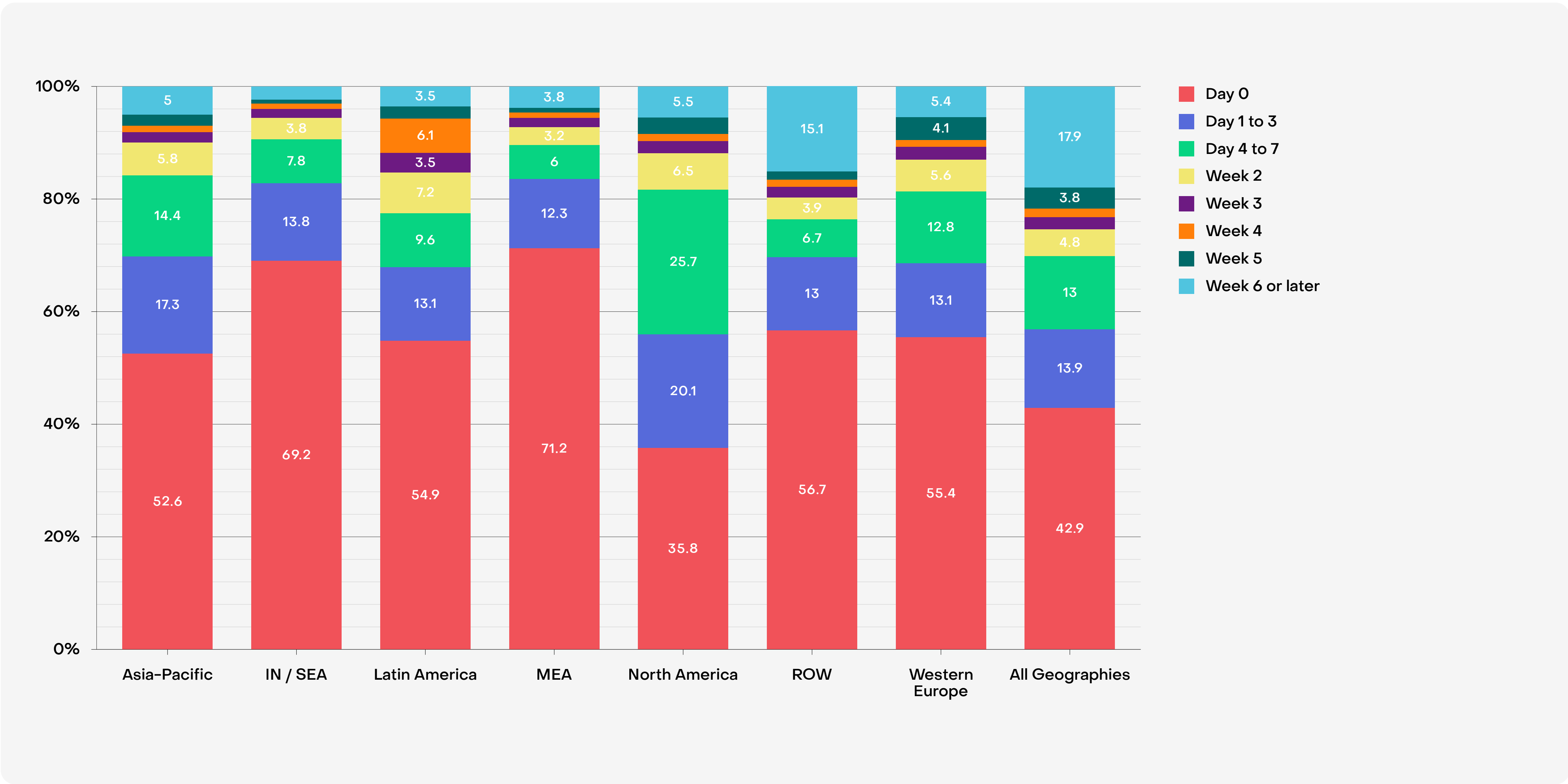
Day 35 Download to Paid Conversion Rate, By Geography

Emerging markets struggle with paid conversion, with Latin America and MEA both showing median rates below 0.2%, suggesting that a reliance on free usage limits direct revenue potential.



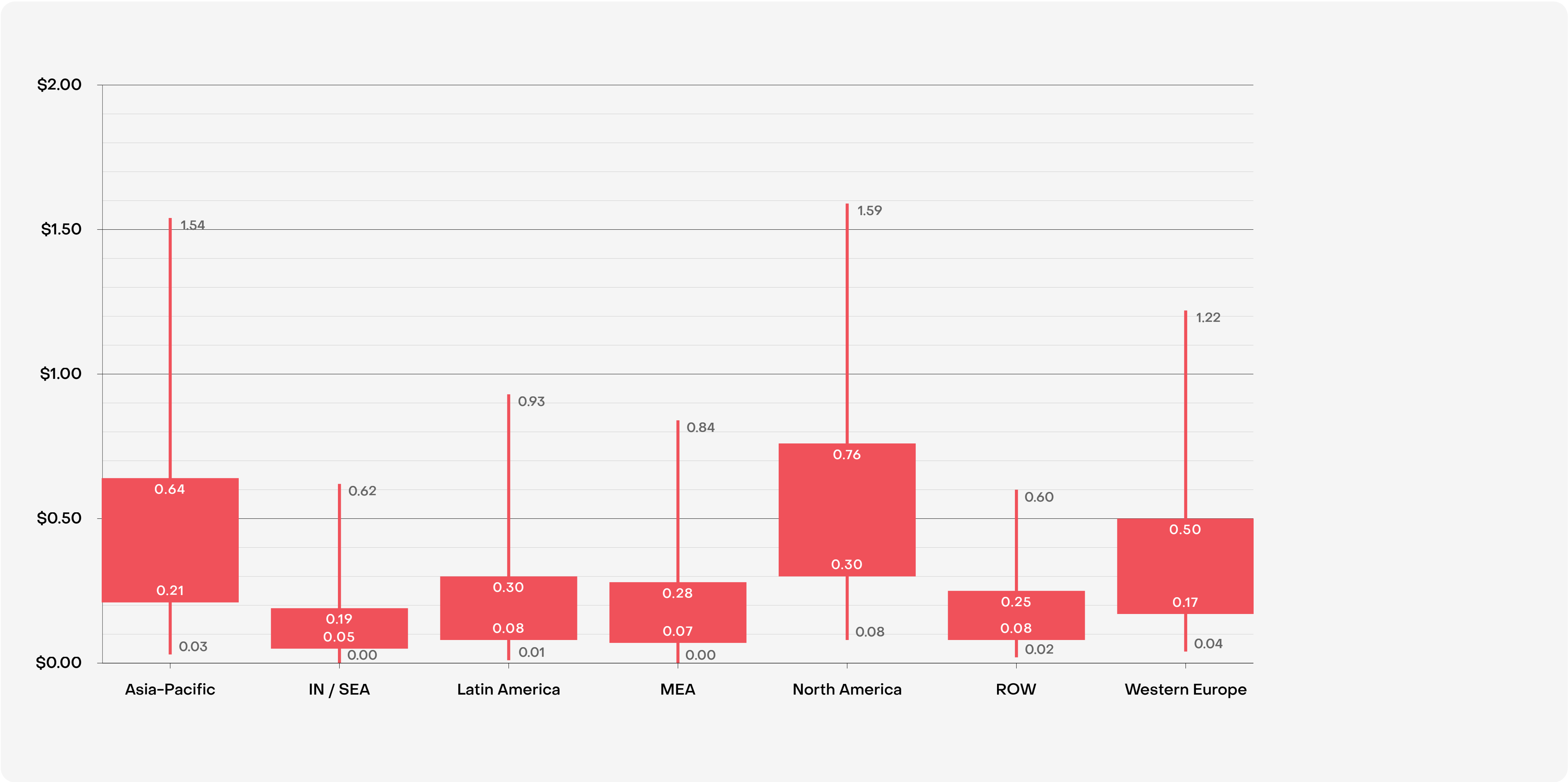
Time to Paid, By Geography

North America shows the most extended purchase window, with only 35.8% converting on Day 0 but 25.7% converting between Days 4–7, indicating a more considered decision-making process.

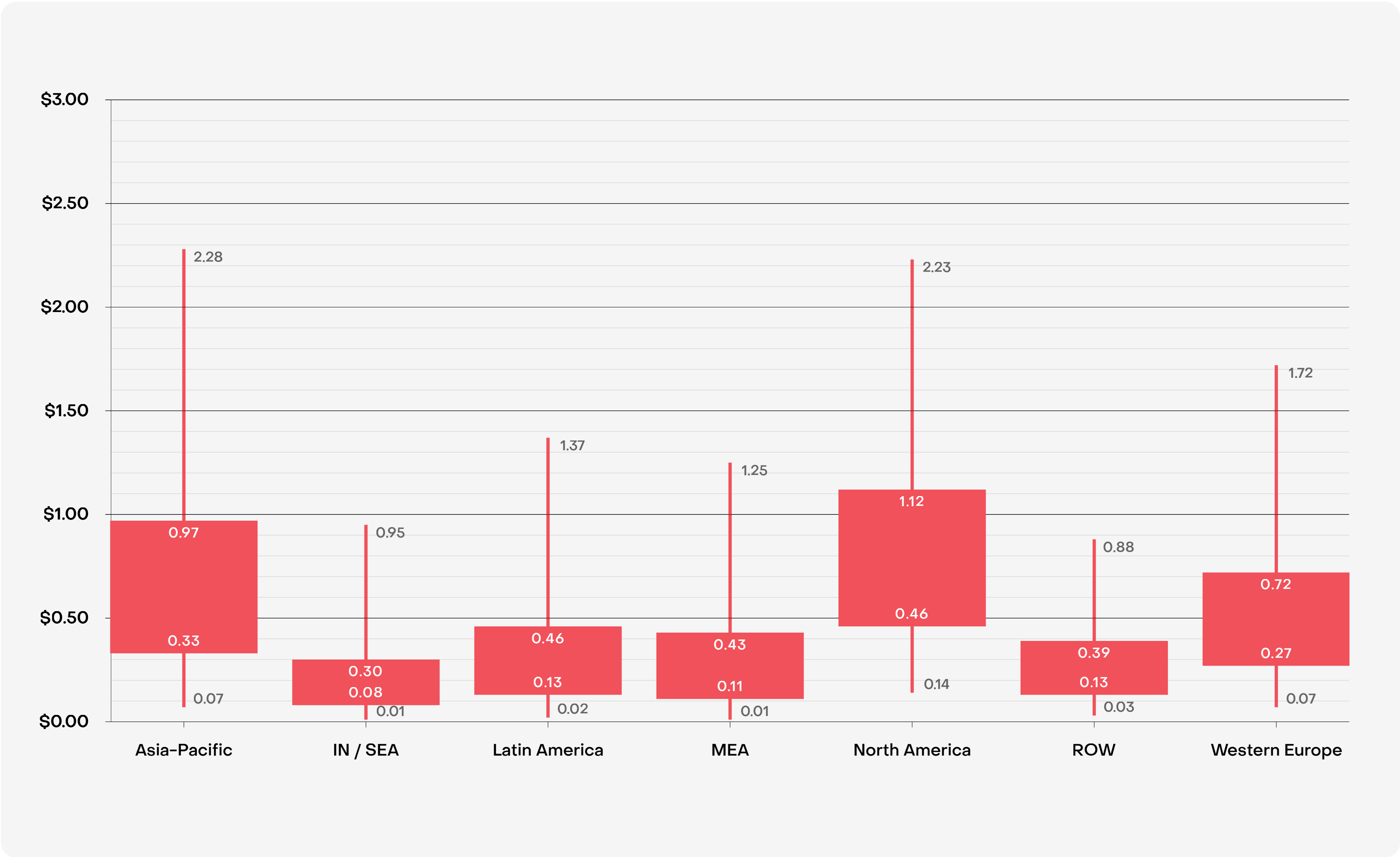


Day 14 Revenue per Install, By Geography

India/Southeast Asia sees the lowest monetization, with a median of just \$0.05, reinforcing the challenges of premium pricing in these regions.



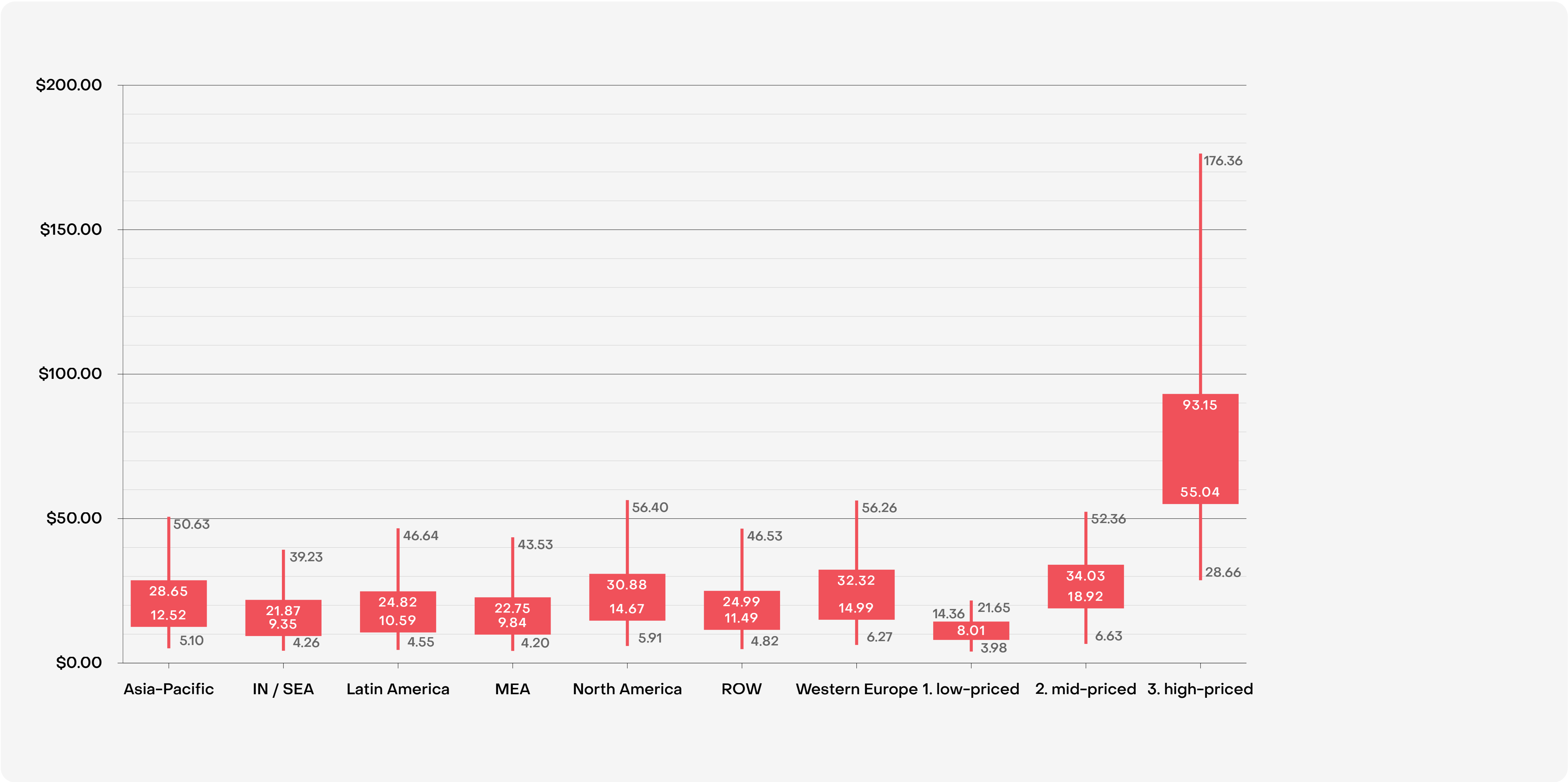
Day 60 Revenue per Install, By Geography



- Long-term revenue per install follows a similar pattern to early monetization, with North America (\$0.46) and Western Europe (\$0.27) leading global benchmarks
- India/Southeast Asia remains the weakest, with a median of \$0.08, showing minimal revenue growth between Day 14 and Day 60

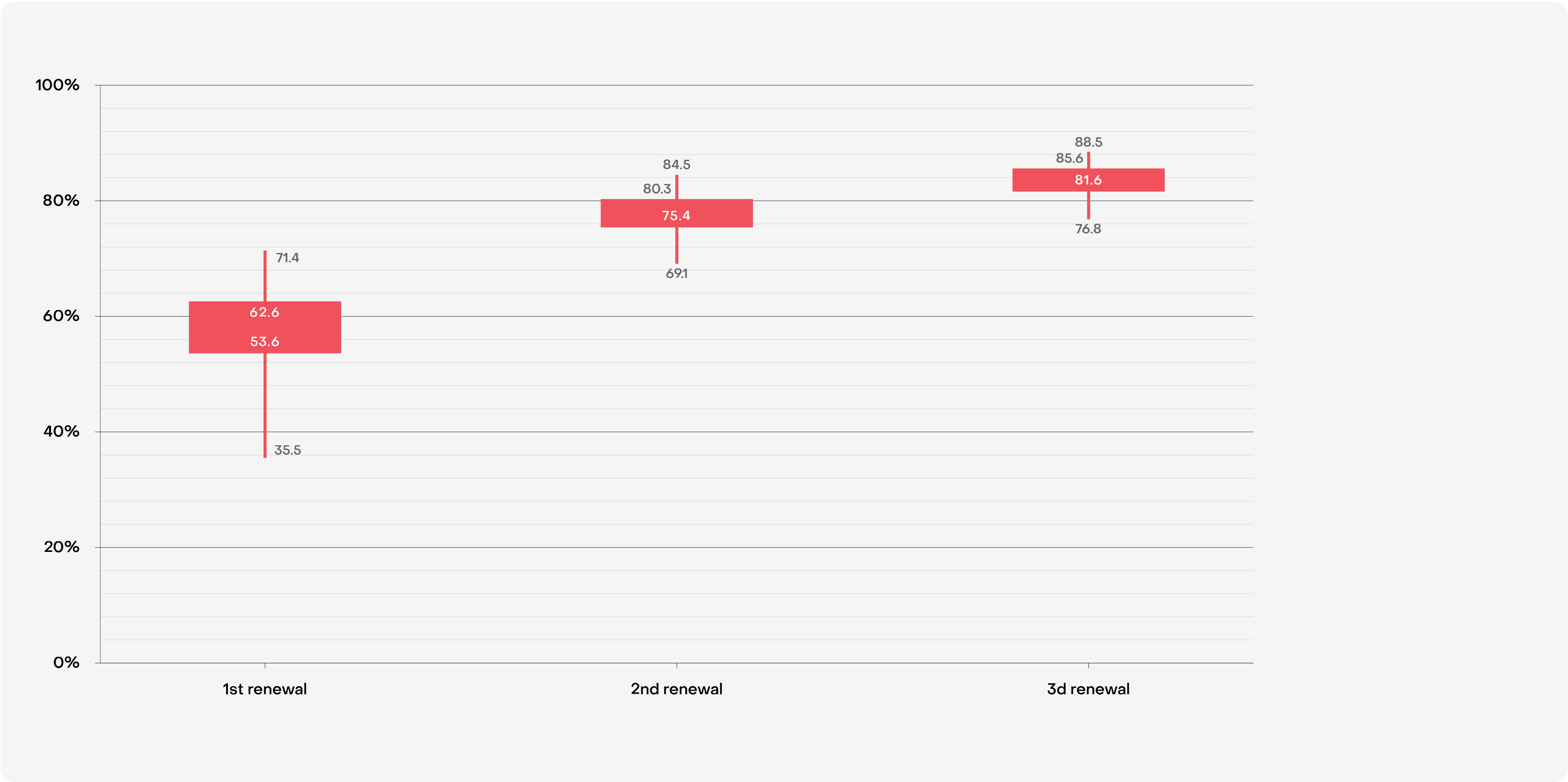
Year 1 Realized LTV per Payer, By Geography and Price Point

Higher pricing tiers significantly boost payer LTV, with high-priced plans reaching a median of \$55.04, compared to just \$8.01 for low-priced plans.



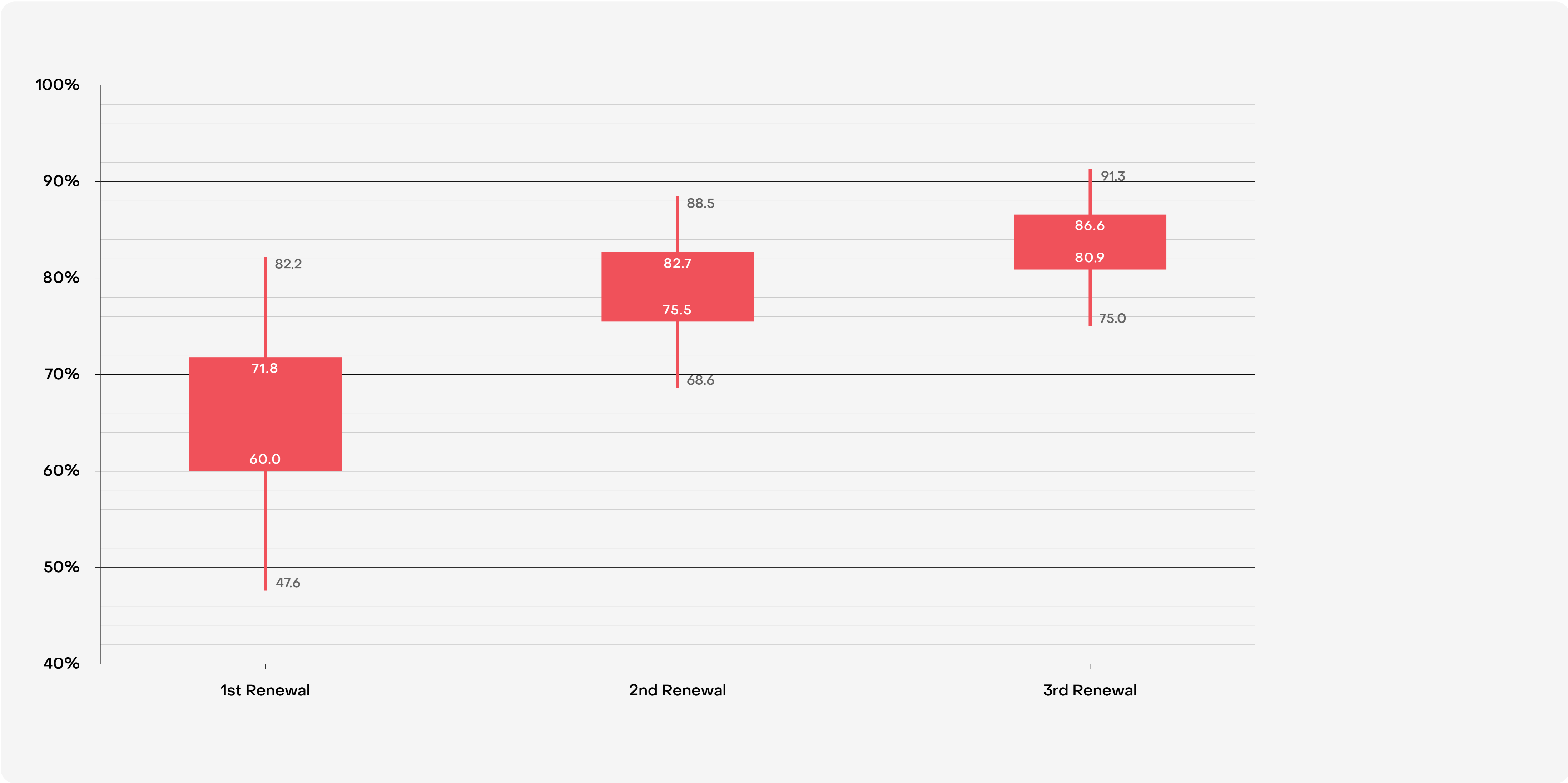
First 3 Weekly Renewals

Retention improves sharply after the first renewal, with the median jumping from 53.6% at Renewal 1 to 75.3% at Renewal 2, suggesting initial churn is the biggest challenge.



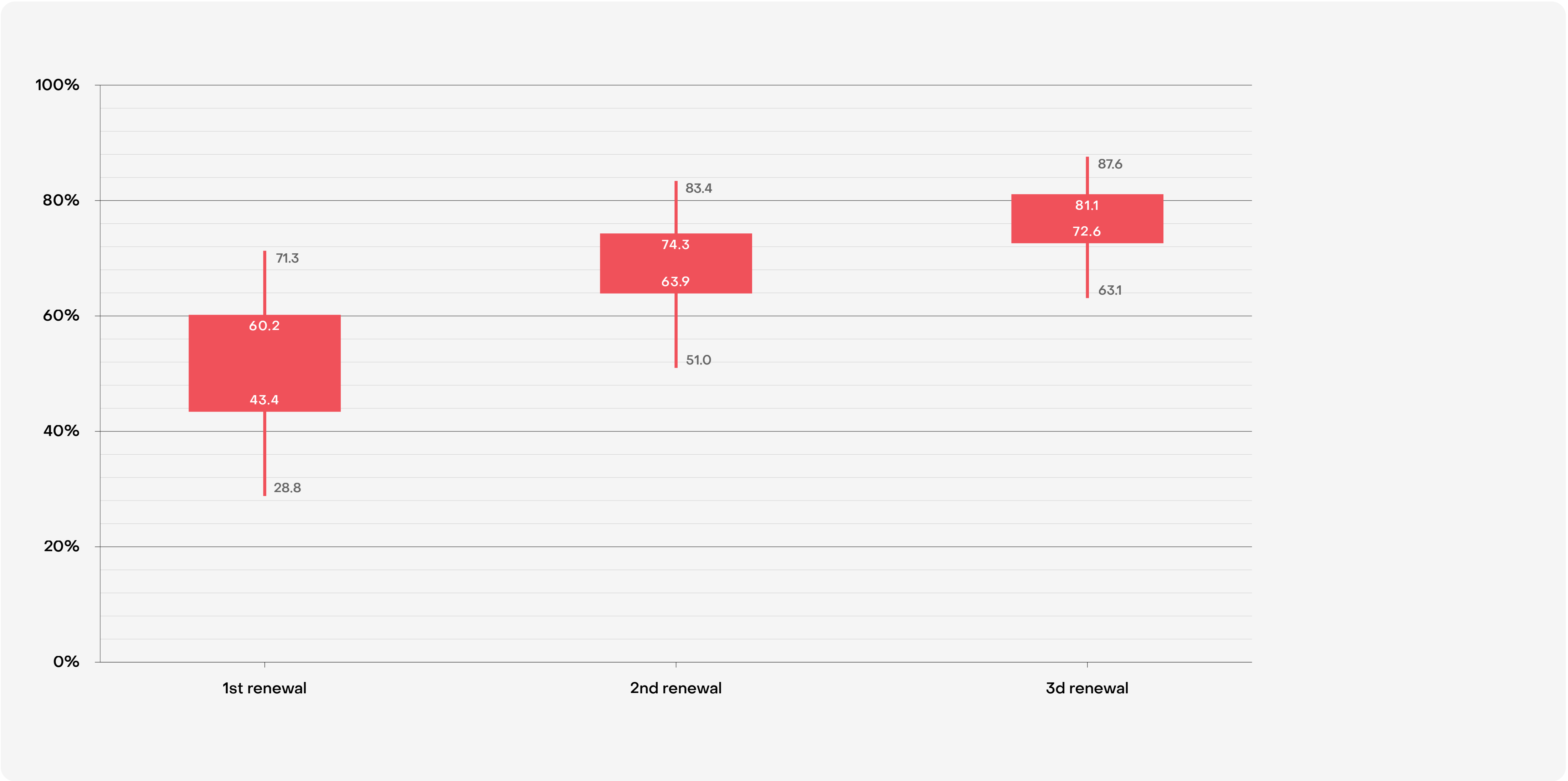
First 3 Monthly Renewals

Long-term retention remains strong, with a median of 80.9% at the third renewal, indicating that users who stay past the initial months are likely to continue.



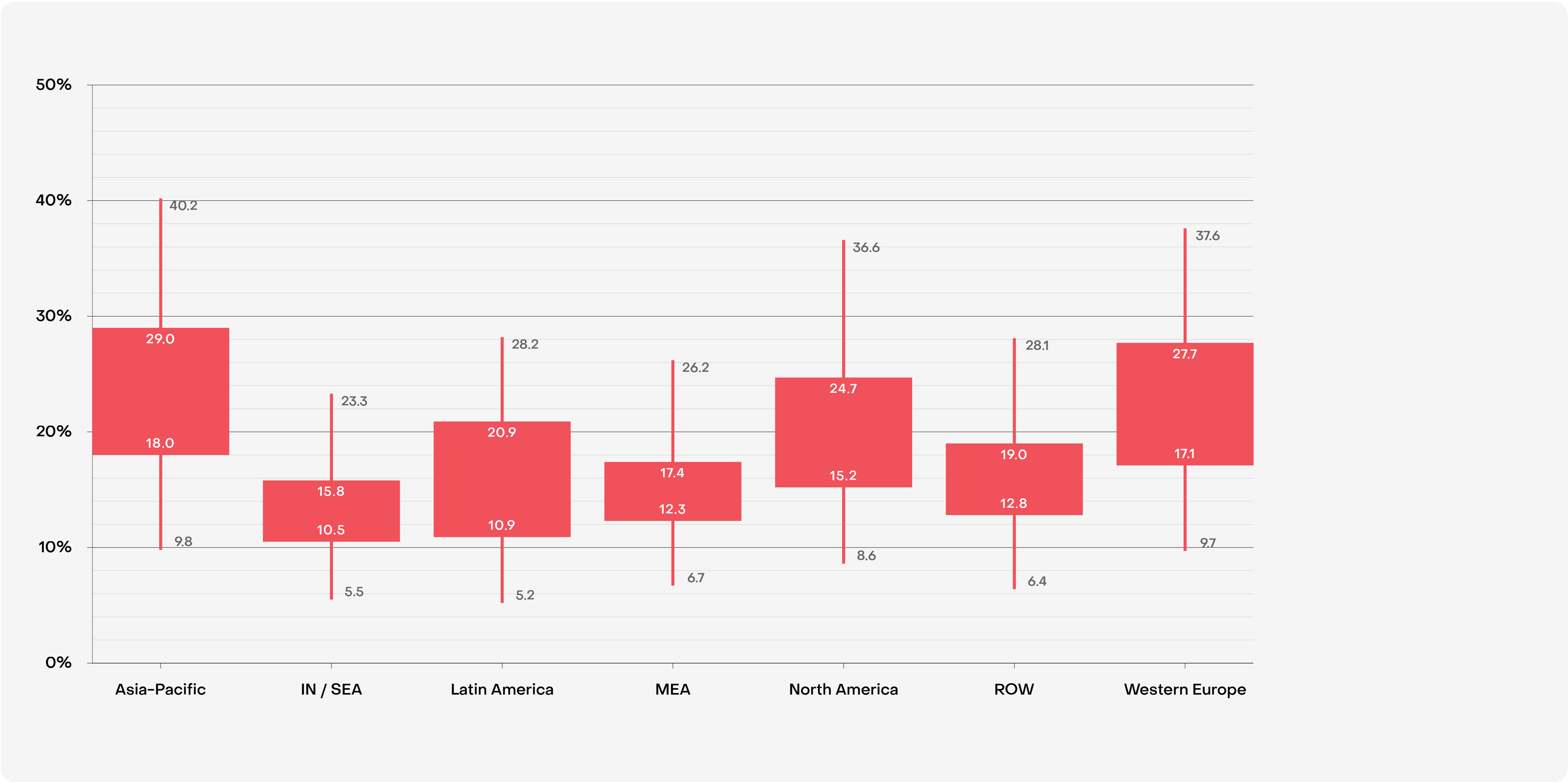
First 3 Annual Renewals

Annual plans start with lower first renewal retention (43.4%) compared to monthly plans (60.0%), but those who renew are significantly more likely to stay long-term.



Year 1 Retained Monthly Subscribers, By Geography

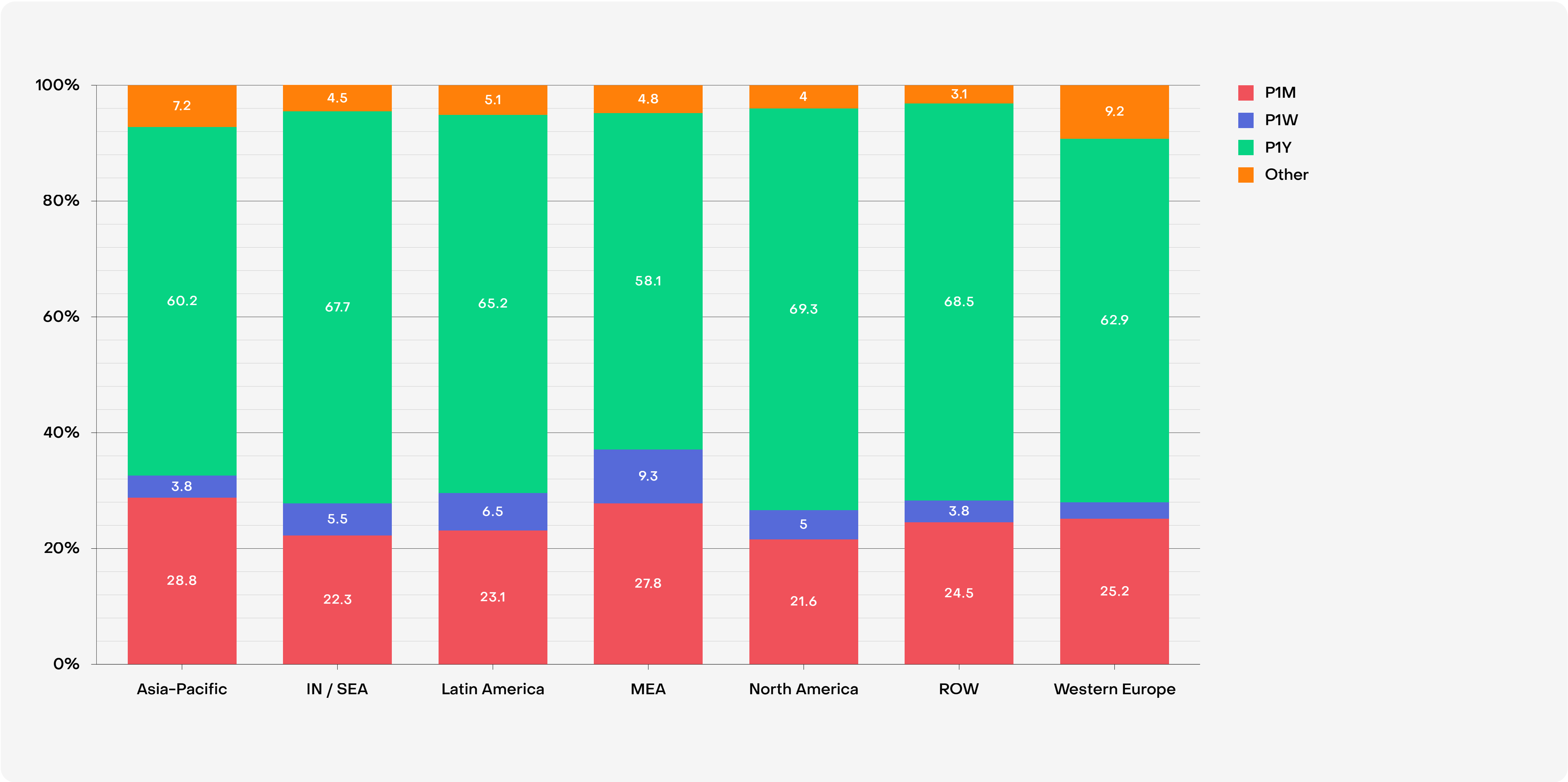
Asia-Pacific and Western Europe lead in monthly retention, with medians of 18.0% and 17.1%, respectively, reinforcing user commitment in these regions.



Health & Fitness

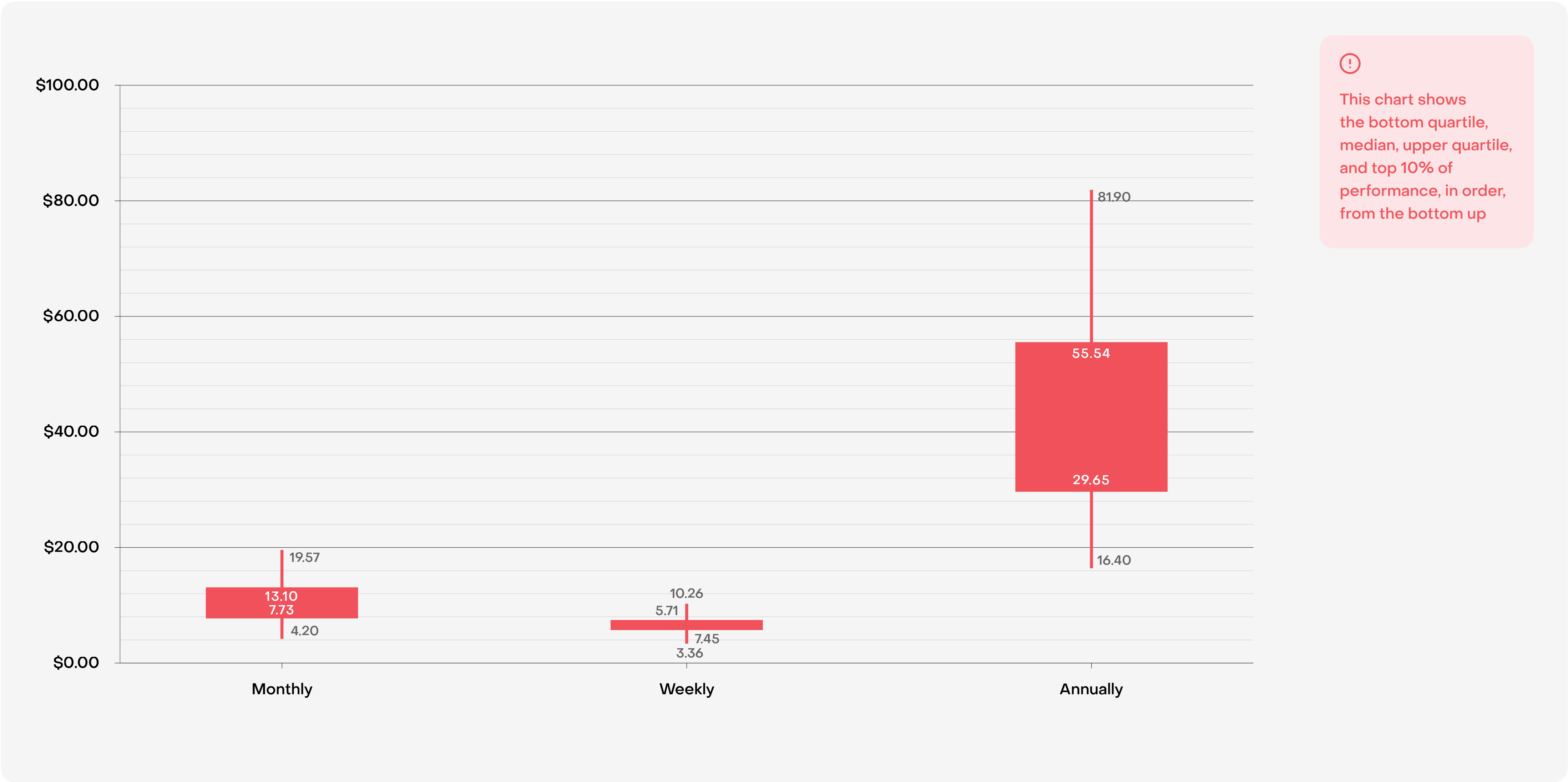
Share of Subscriptions Sold, By Geography

Annual subscriptions dominate in all regions, making up over 60% of purchases, peaking at 69.3% in North America. This suggests strong user commitment to long-term health goals.



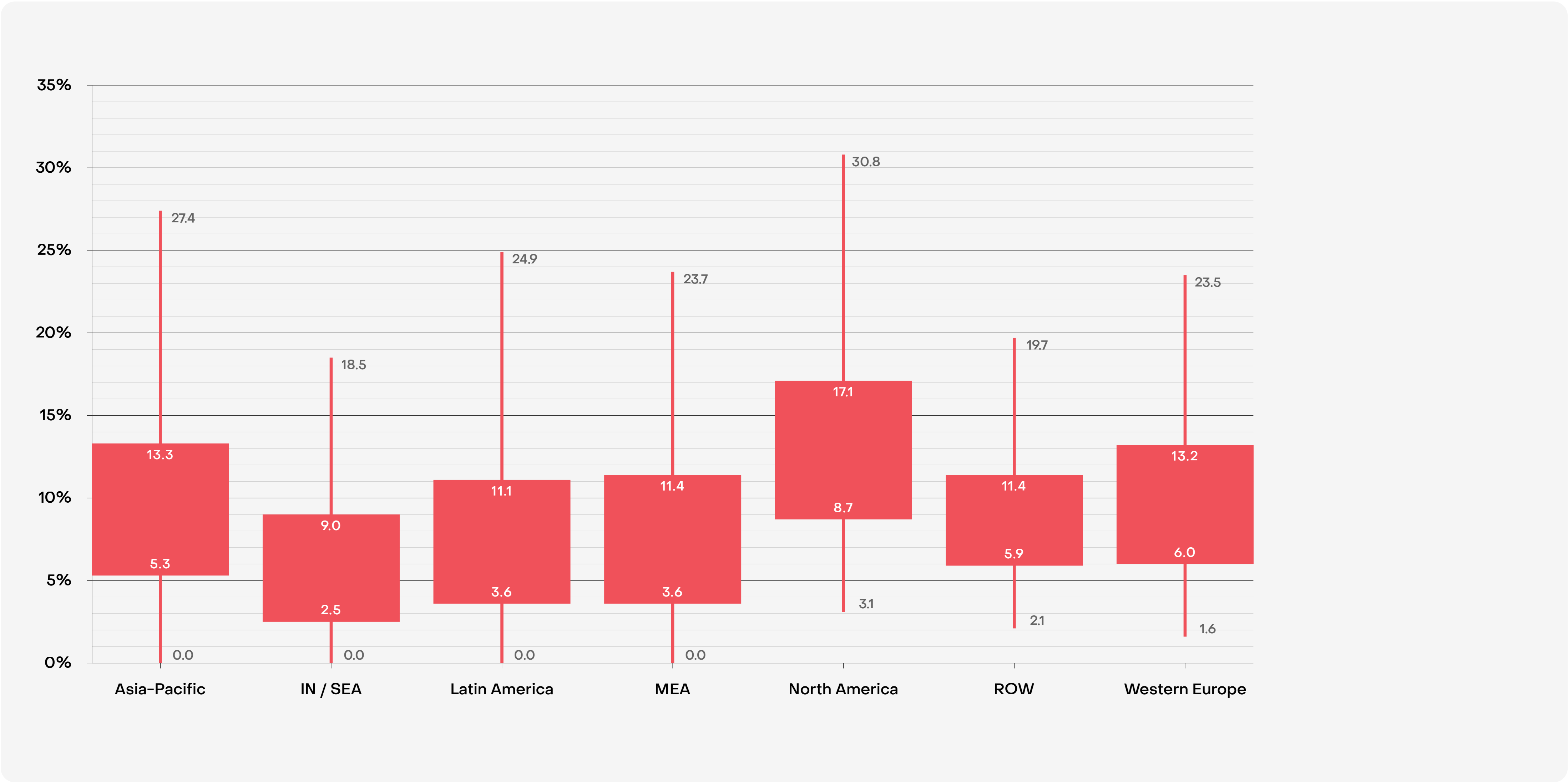
Price Points per Plan Duration

Annual plans provide the best value per dollar, with a median price of \$29.65, making them just 3.8 times the cost of a monthly plan at \$7.73.



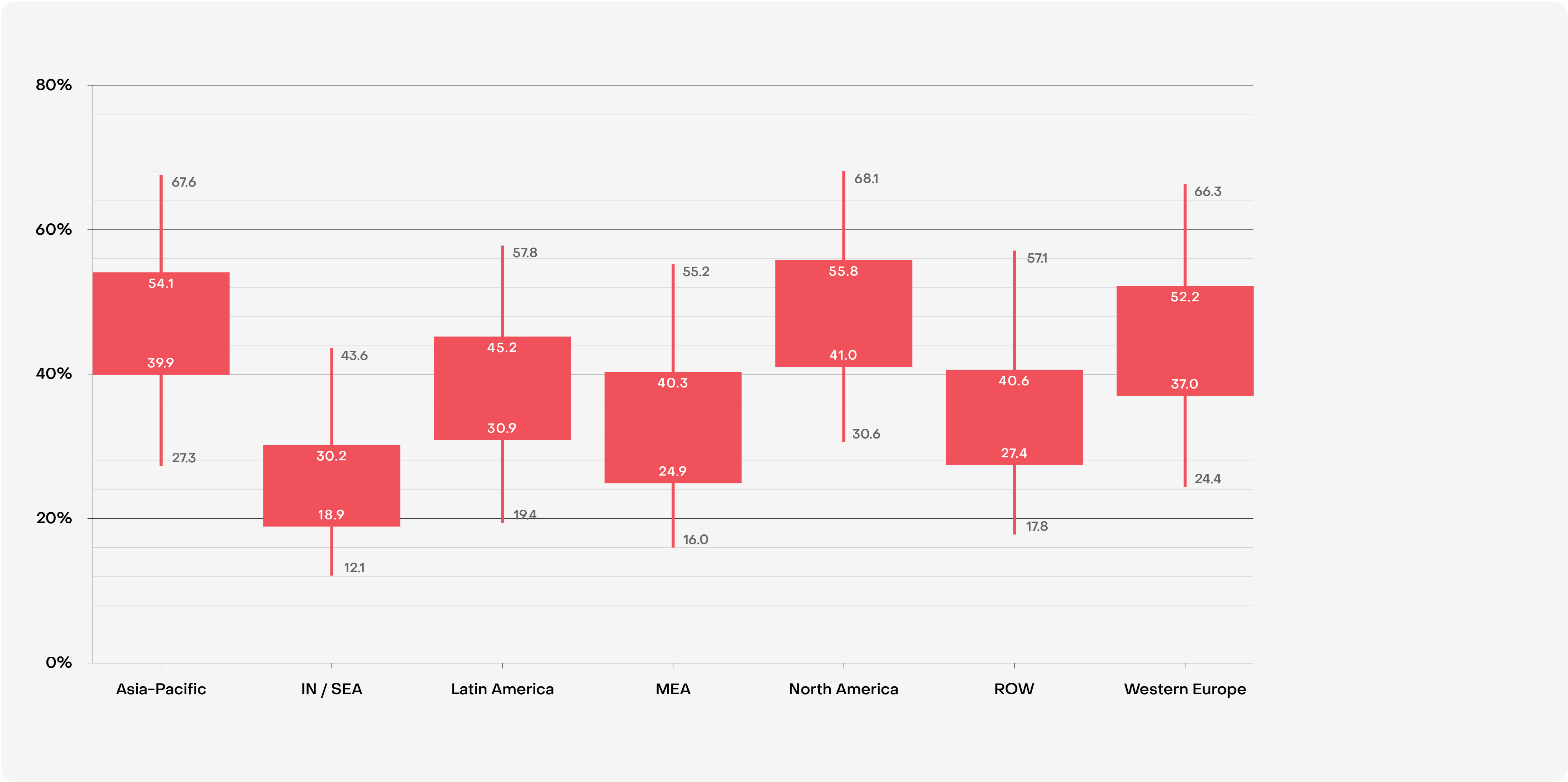
Trial Start Rate, By Geography

Across all regions, the bottom quartile is 0%, suggesting that many Health & Fitness apps do not offer trials, potentially impacting acquisition rates.



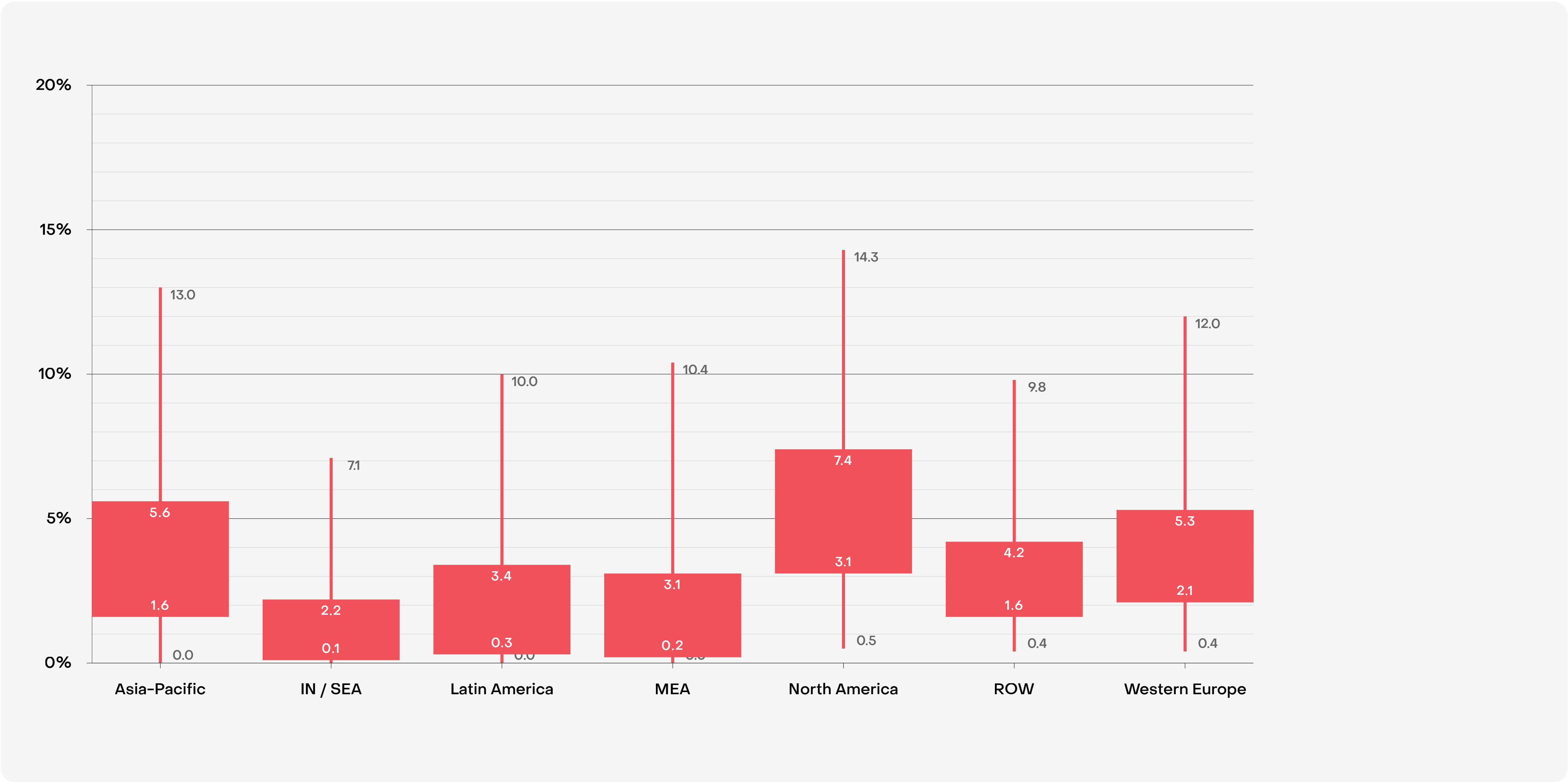
Trial to Paid Conversion Rate, By Geography

North America and Asia-Pacific lead in trial-to-paid conversion, both exceeding a 39% median, reinforcing strong monetization potential for engaged trial users.



Day 35 Download to Paid Conversion Rate, By Geography

North America sees the strongest conversion from downloads to paid users, with a median of 3.1%, nearly 50% higher than that of Western Europe at 2.1%.



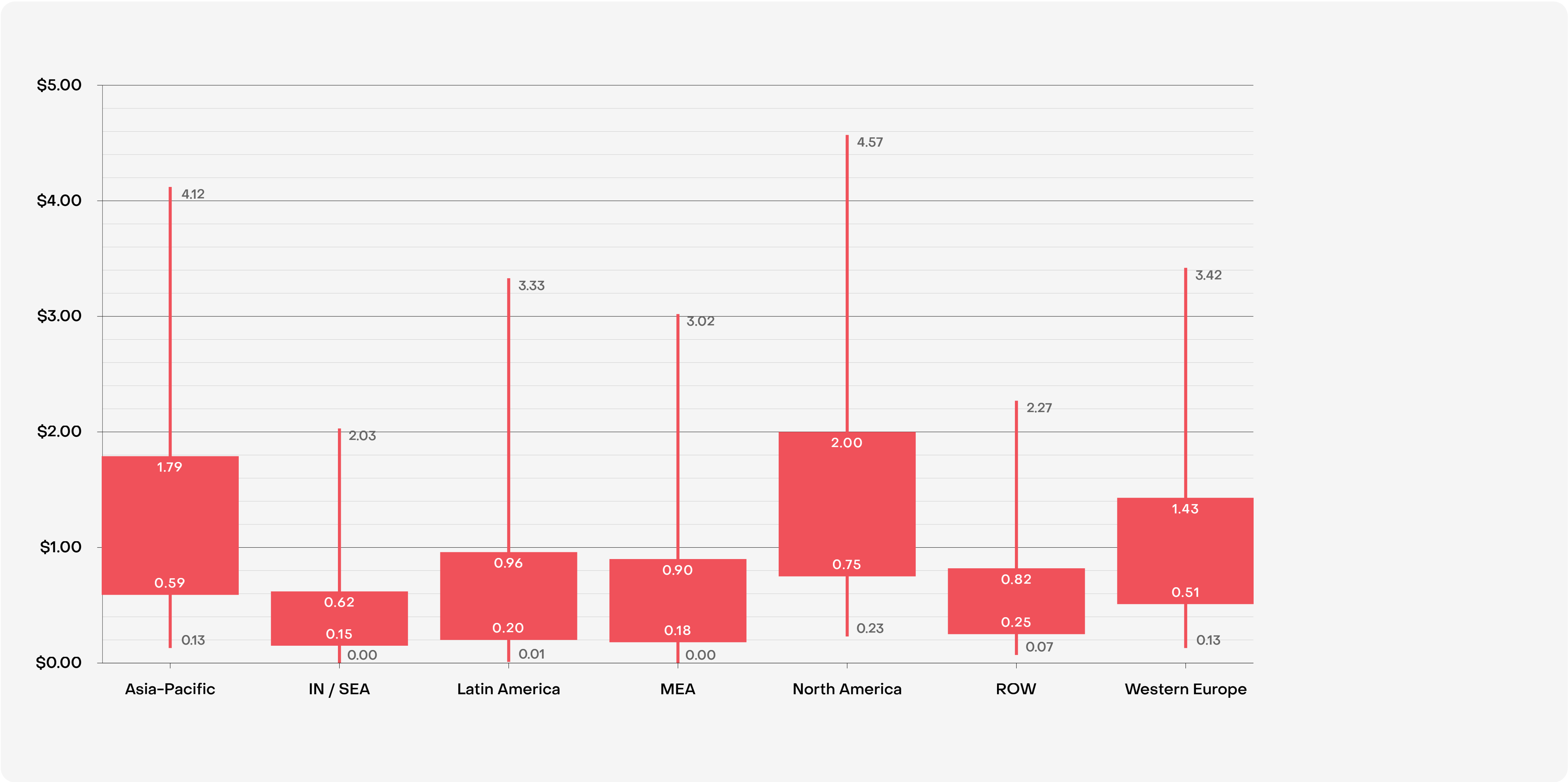
Time to Paid, By Geography

North America experiences the highest share of delayed conversions, with over 34% occurring between Days 4-7, suggesting users take more time to evaluate paid plans.



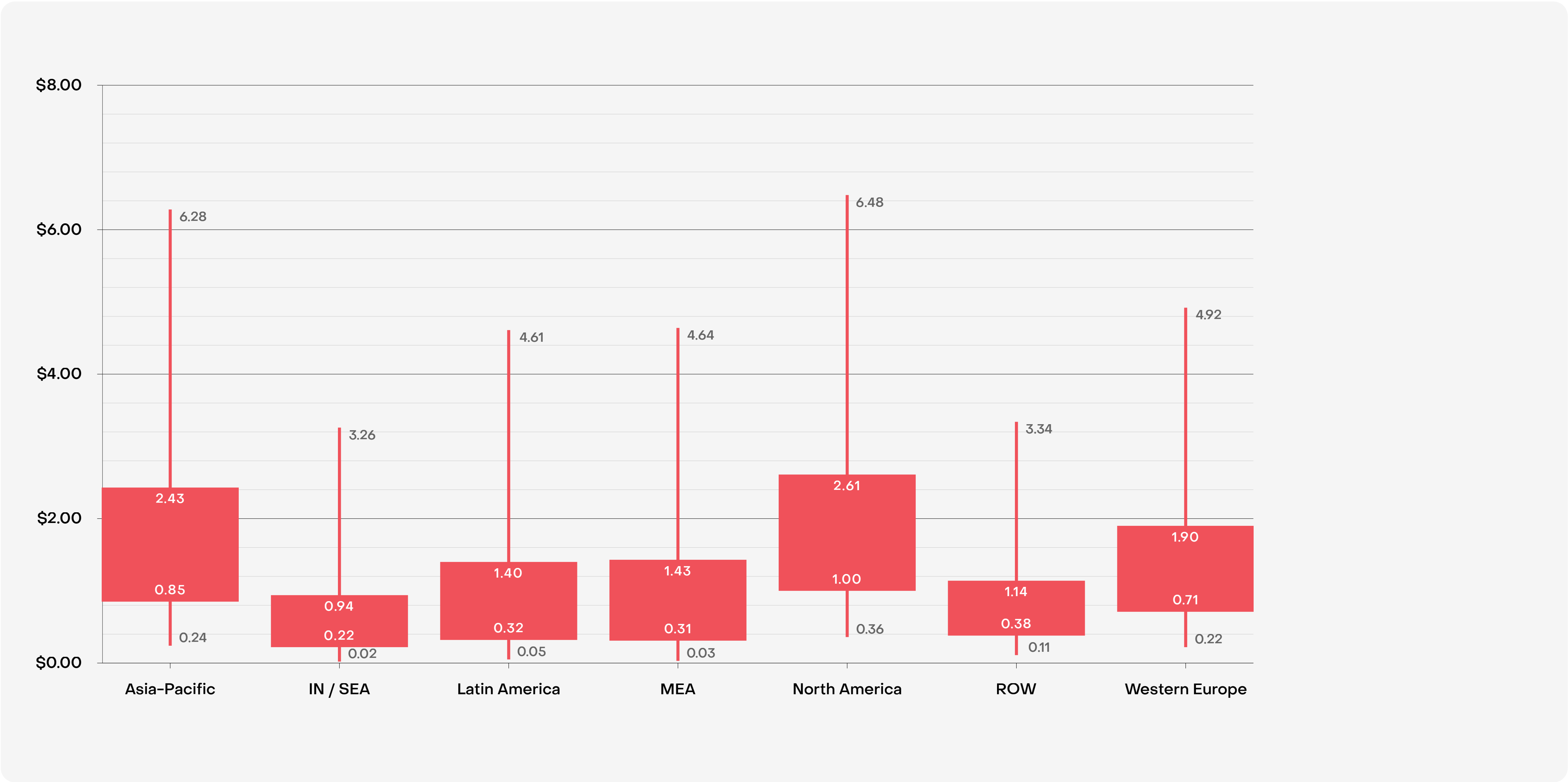
Day 14 Revenue per Install, By Geography

North America generates the highest short-term revenue per install, with a median of \$0.75, followed by Asia-Pacific at \$0.59.



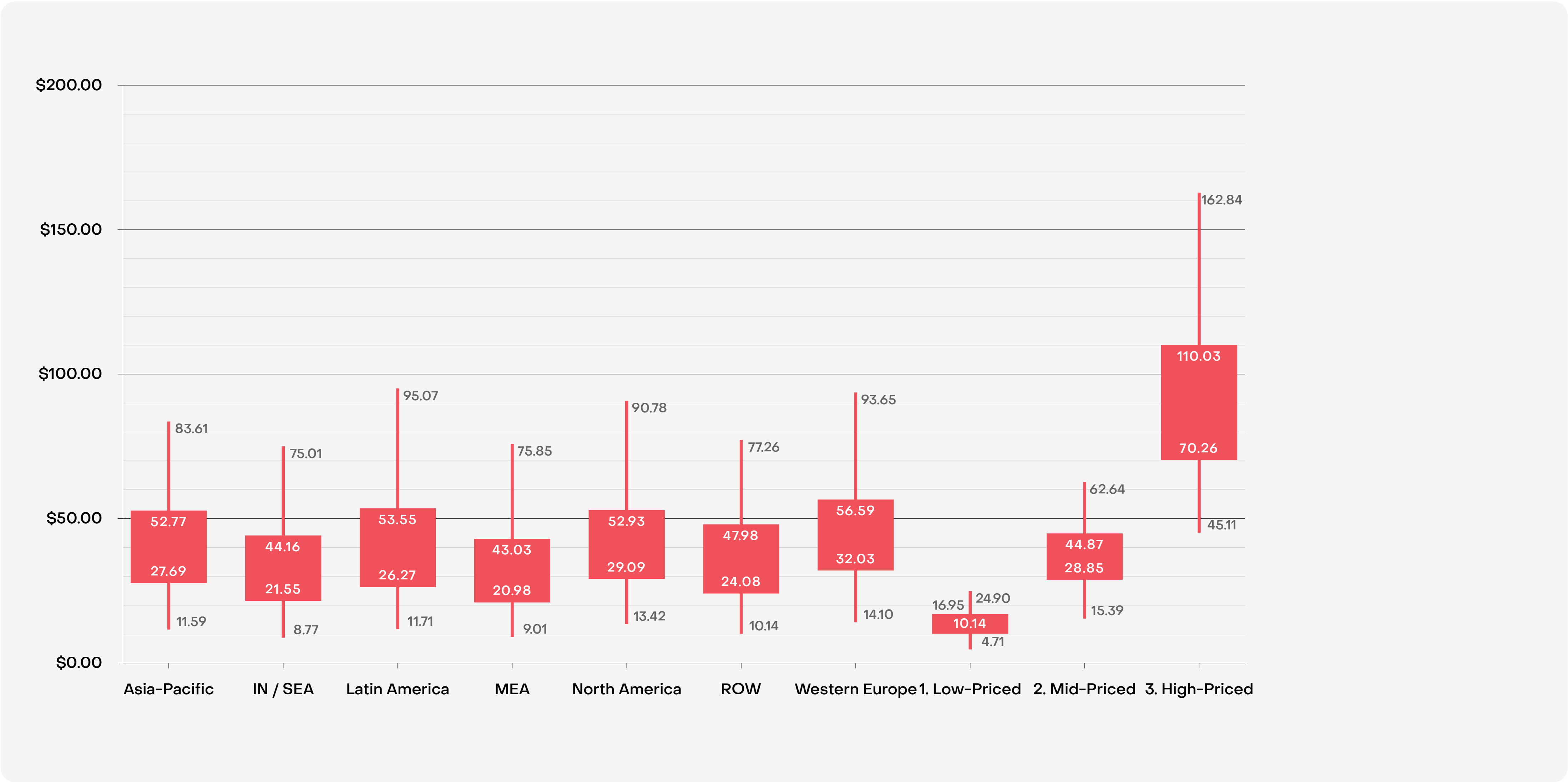
Day 60 Revenue per Install, By Geography

Revenue per install increases significantly over time, with North America reaching a median of \$1.00 by Day 60, highlighting the value of retention.



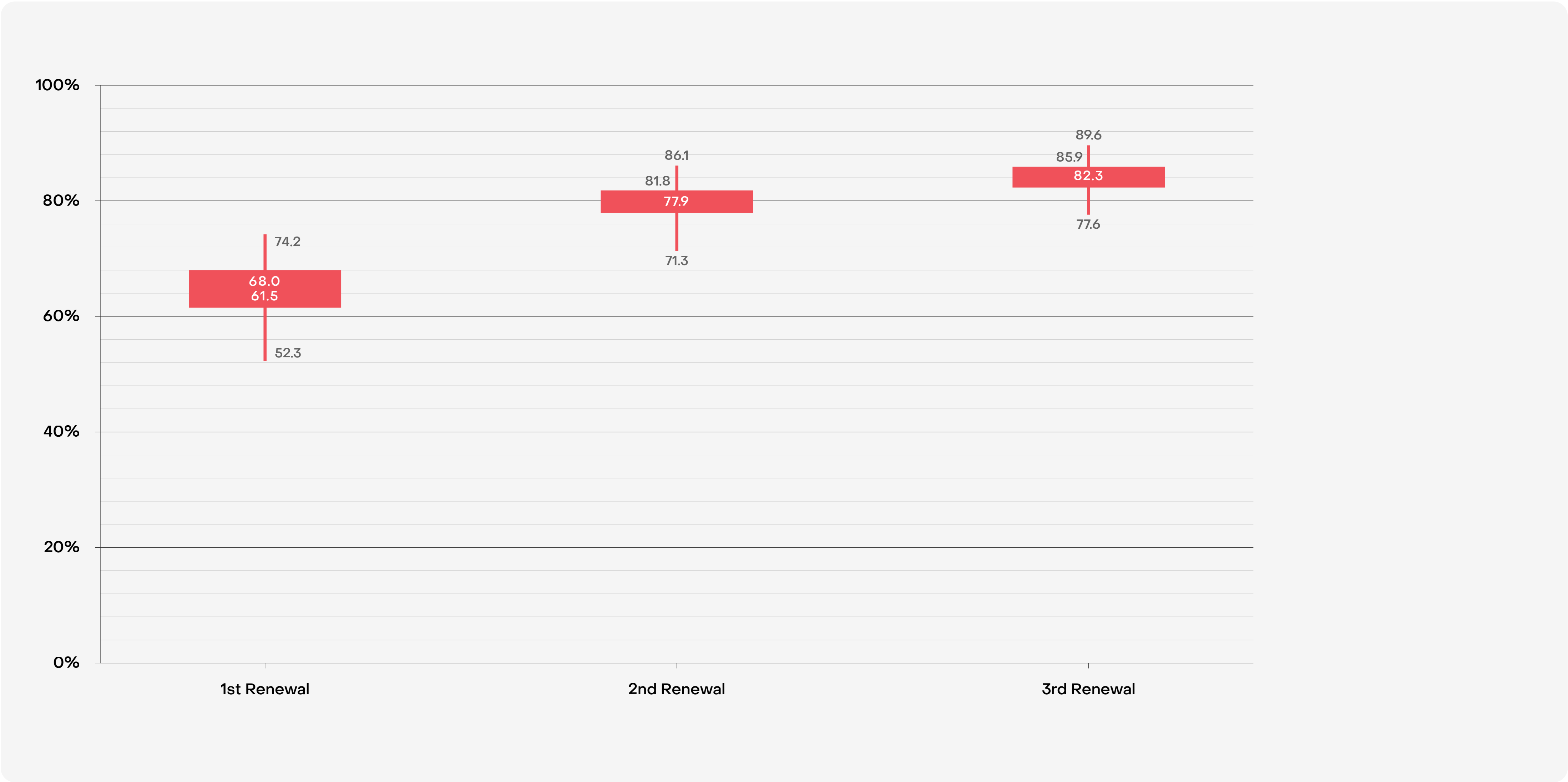
Year 1 Realized LTV per Payer, By Geography and Price Point

High-priced plans drive significantly greater LTV, with a median of \$70.26, compared to just \$10.14 for low-priced subscriptions, reinforcing the long-term value of premium tiers.



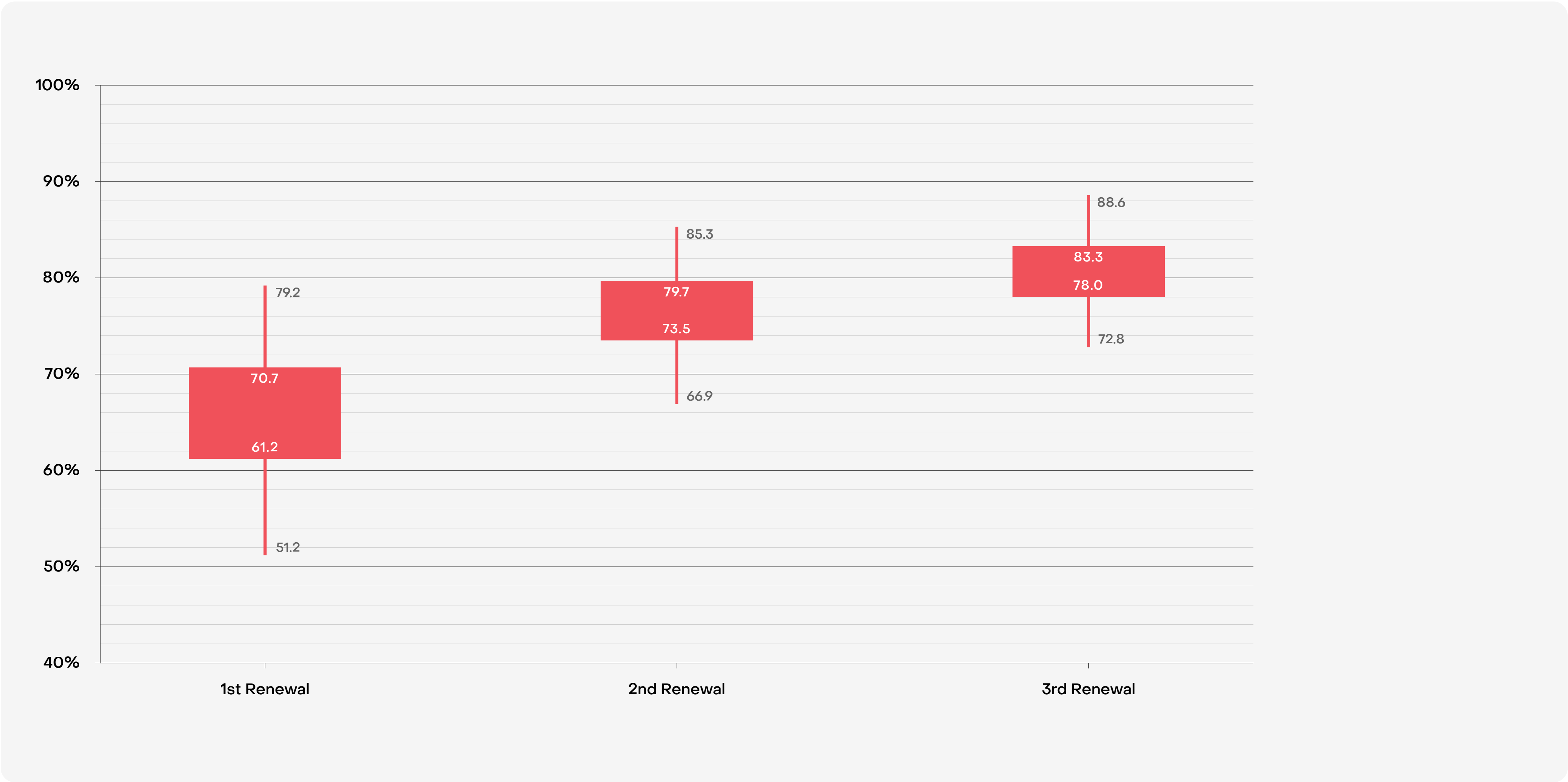
First 3 Weekly Renewals

Renewal rates improve significantly after the first cycle, jumping from 61.5% at Renewal 1 to 77.9% at Renewal 2, indicating stronger engagement among retained subscribers.



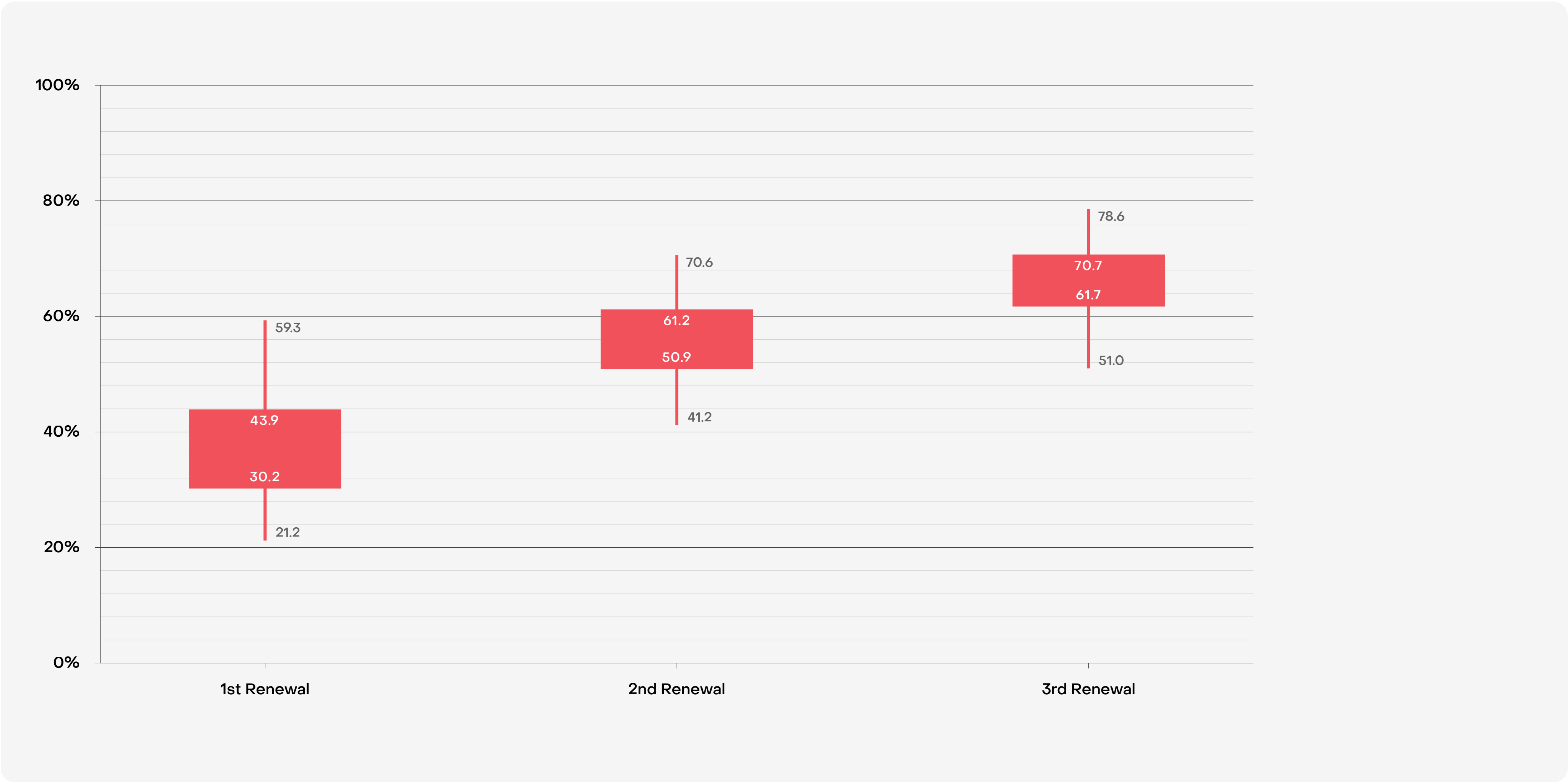
First 3 Monthly Renewals

Long-term engagement remains high, with 78.0% of third-month renewals staying subscribed, reinforcing the stickiness of monthly plans in Health & Fitness apps.



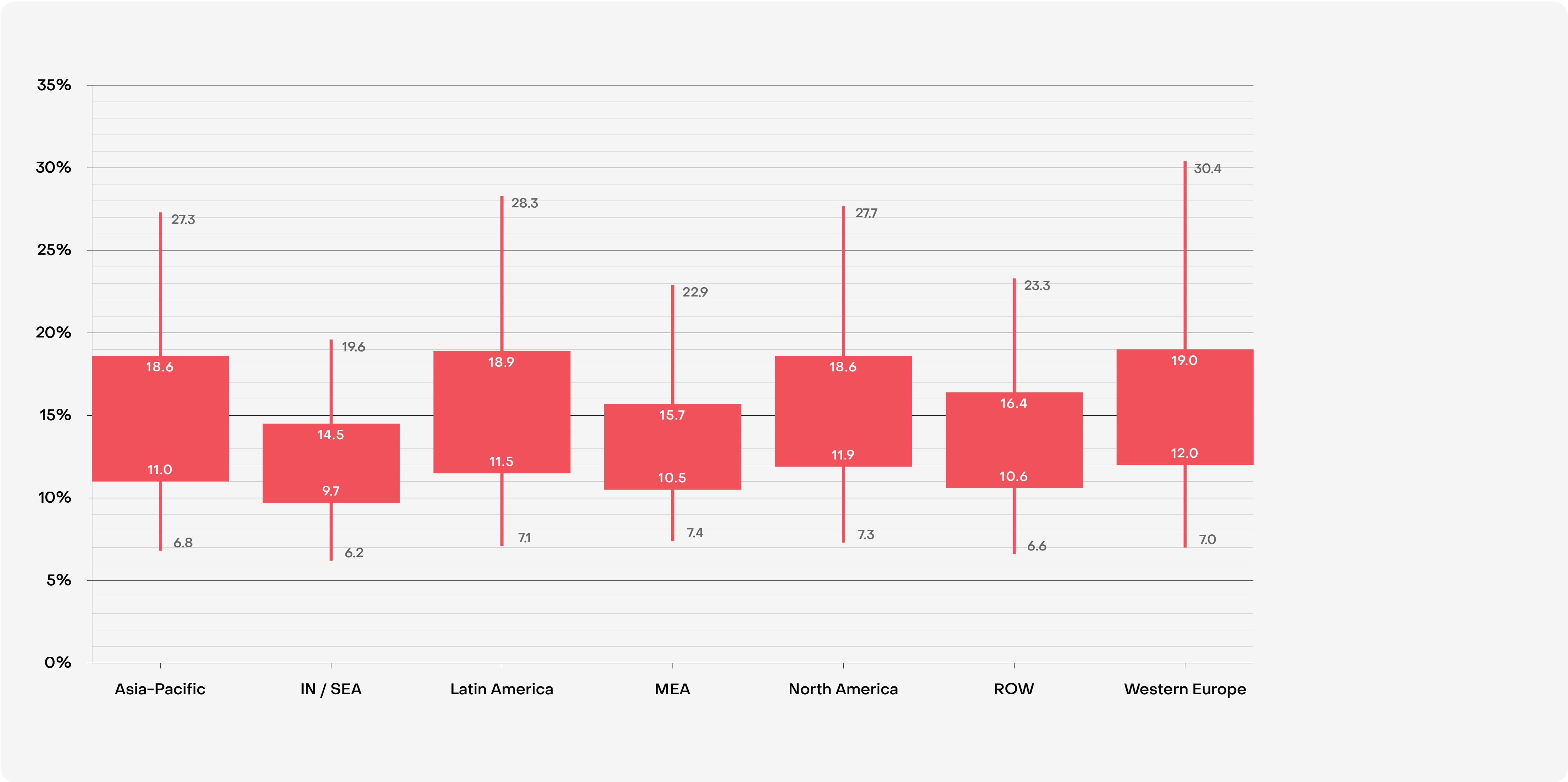
First 3 Annual Renewals

First-year renewal rates for annual plans are lower than other durations, with a median of 30.2%, suggesting that users may be hesitant to commit for another full year.



Year 1 Retained Monthly Subscribers, By Geography

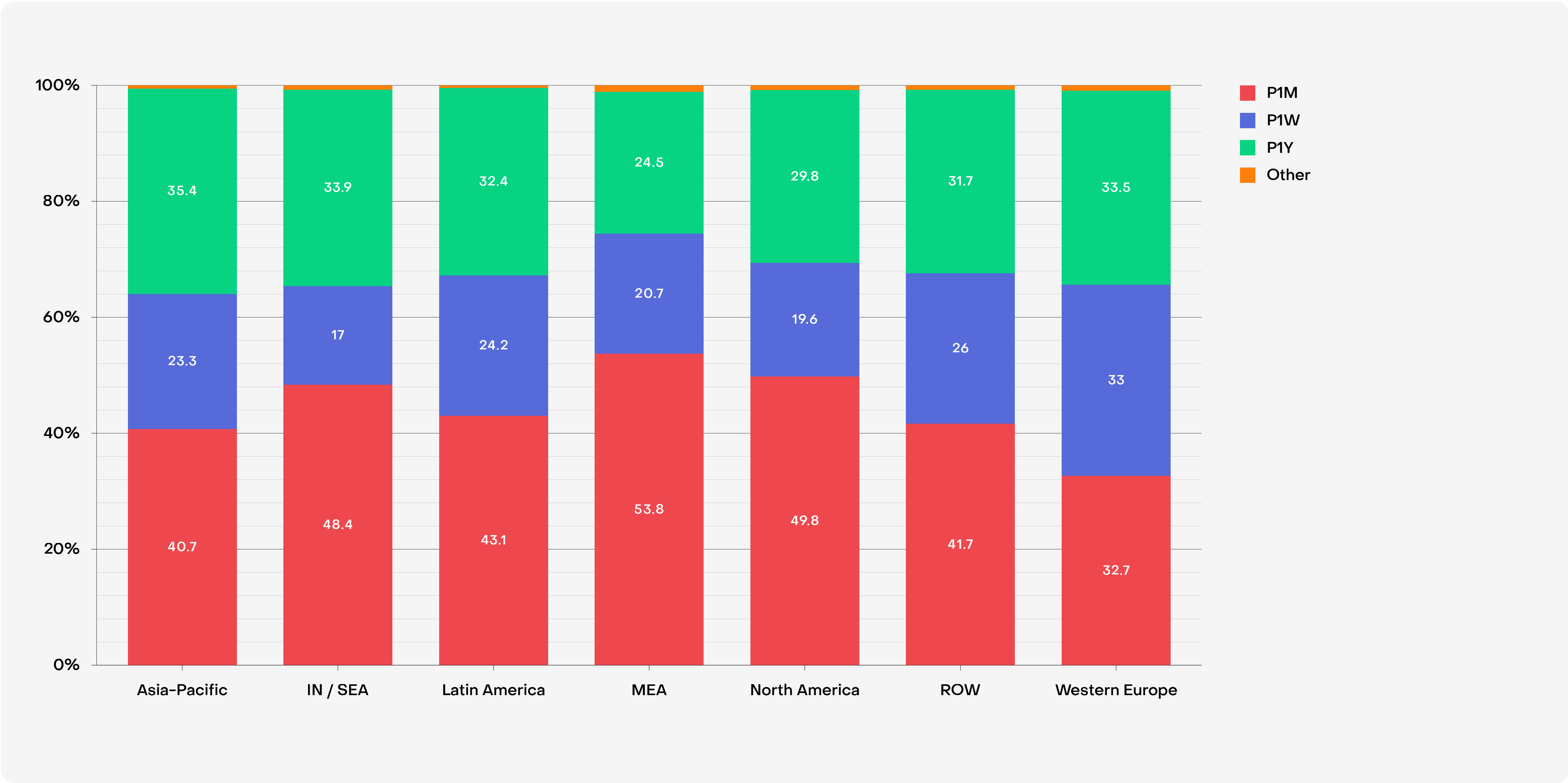
Western Europe leads in long-term retention, with a median of 12.0% of monthly subscribers remaining after a year, slightly ahead of North America at 11.9%.



Media & Entertainment

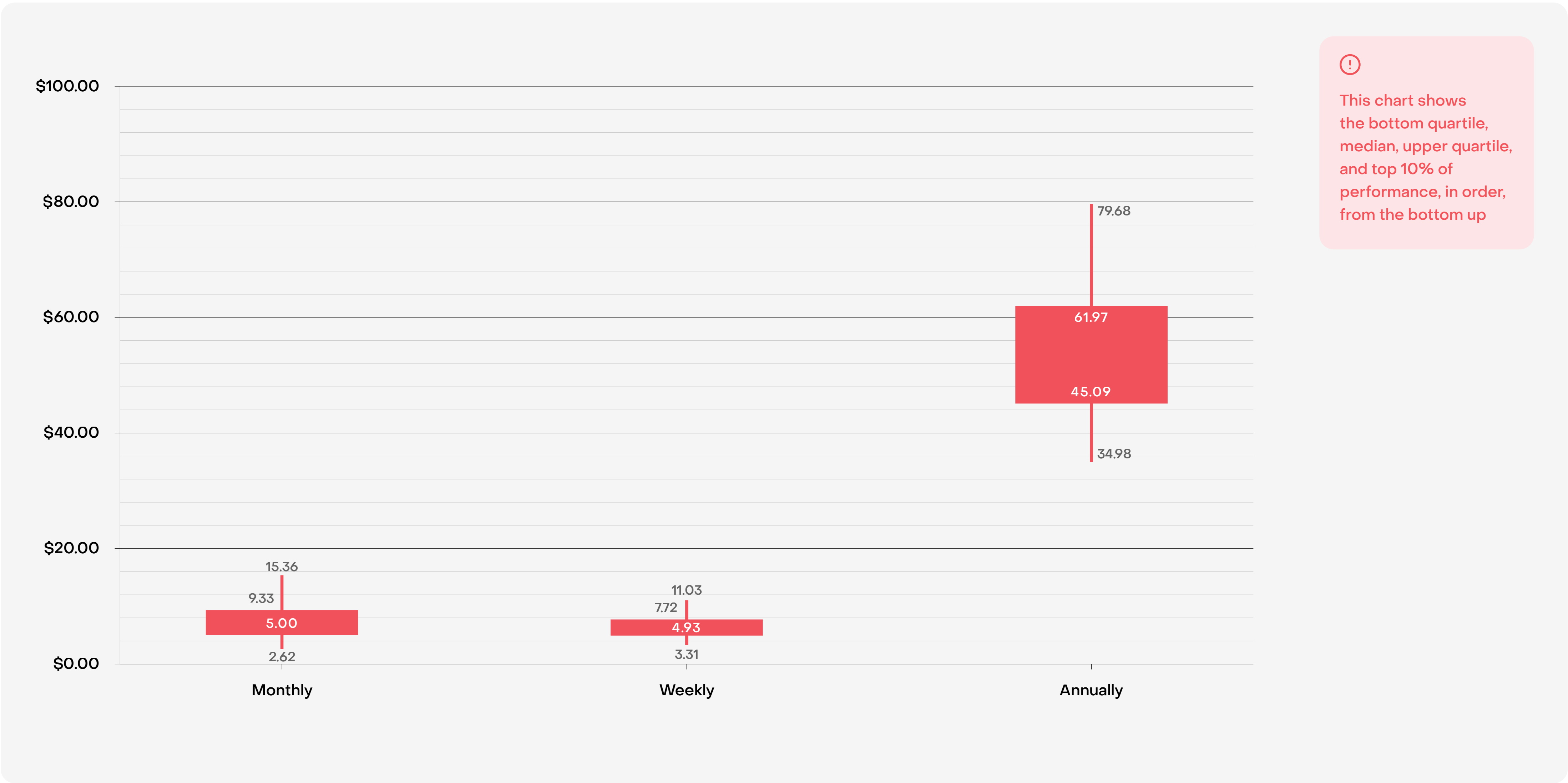
Share of Subscriptions Sold, By Geography

Monthly plans are the most popular across all regions, with North America leading at 49.8%. This aligns with industry trends where users prefer flexibility over long-term commitments for entertainment content.



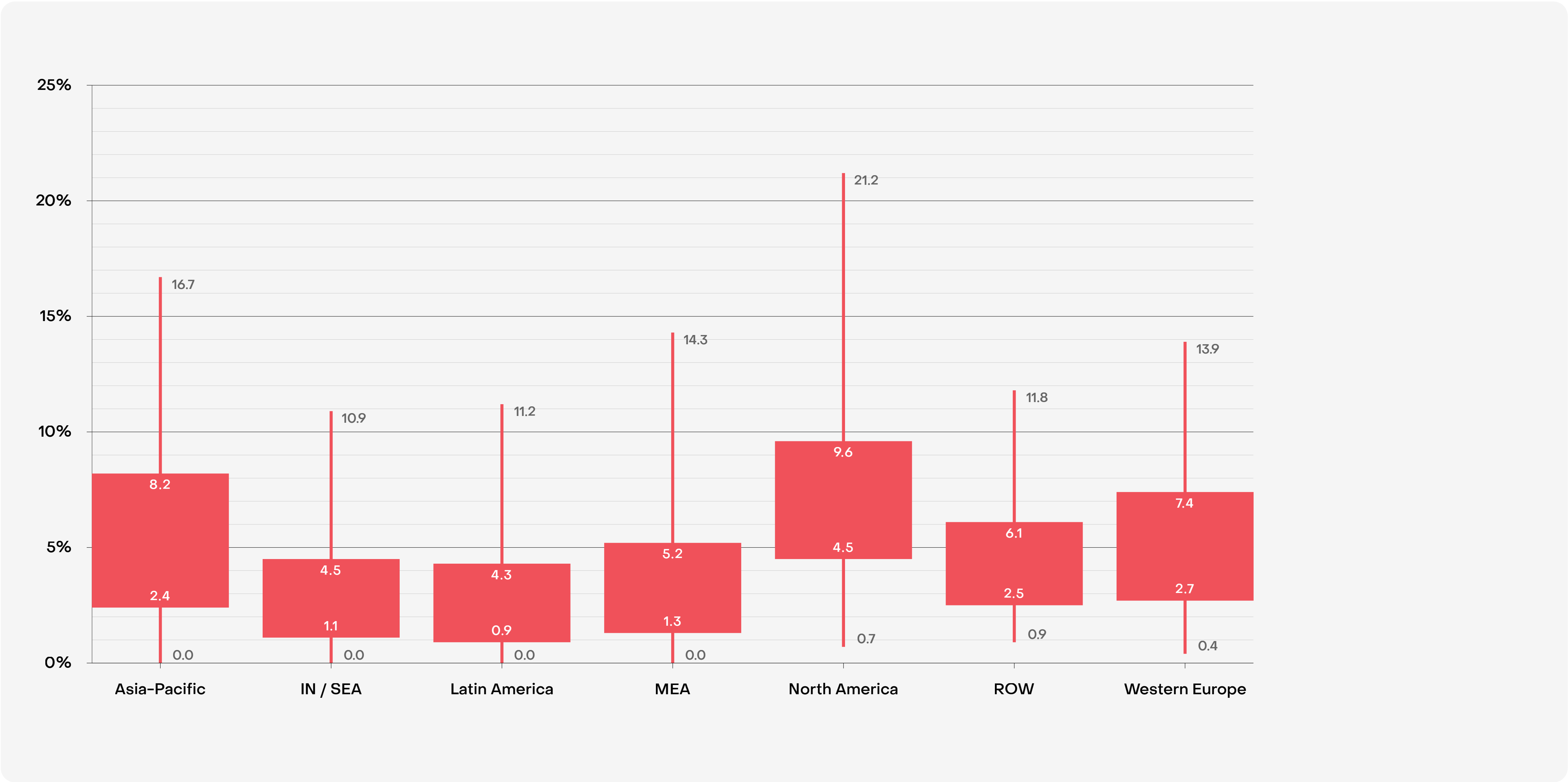
Price Points per Plan Duration

Weekly plans are priced at a premium relative to monthly plans, with a median of \$4.93, which could encourage users to upgrade to longer-term commitments.



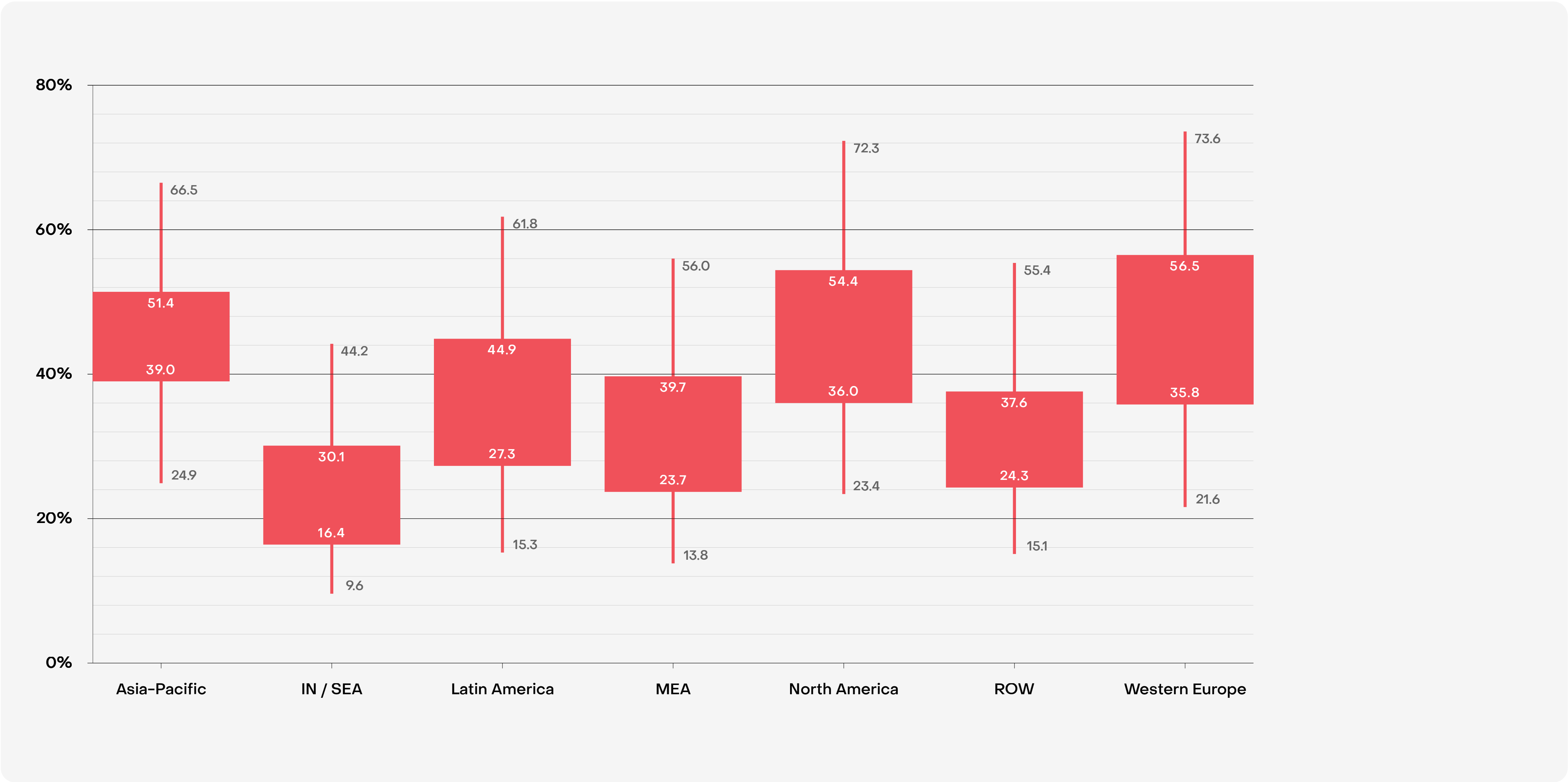
Trial Start Rate, By Geography

Trial adoption remains low across emerging markets, with India/Southeast Asia, Latin America, and MEA all reporting median rates below 2%, possibly due to reliance on free ad-supported content.



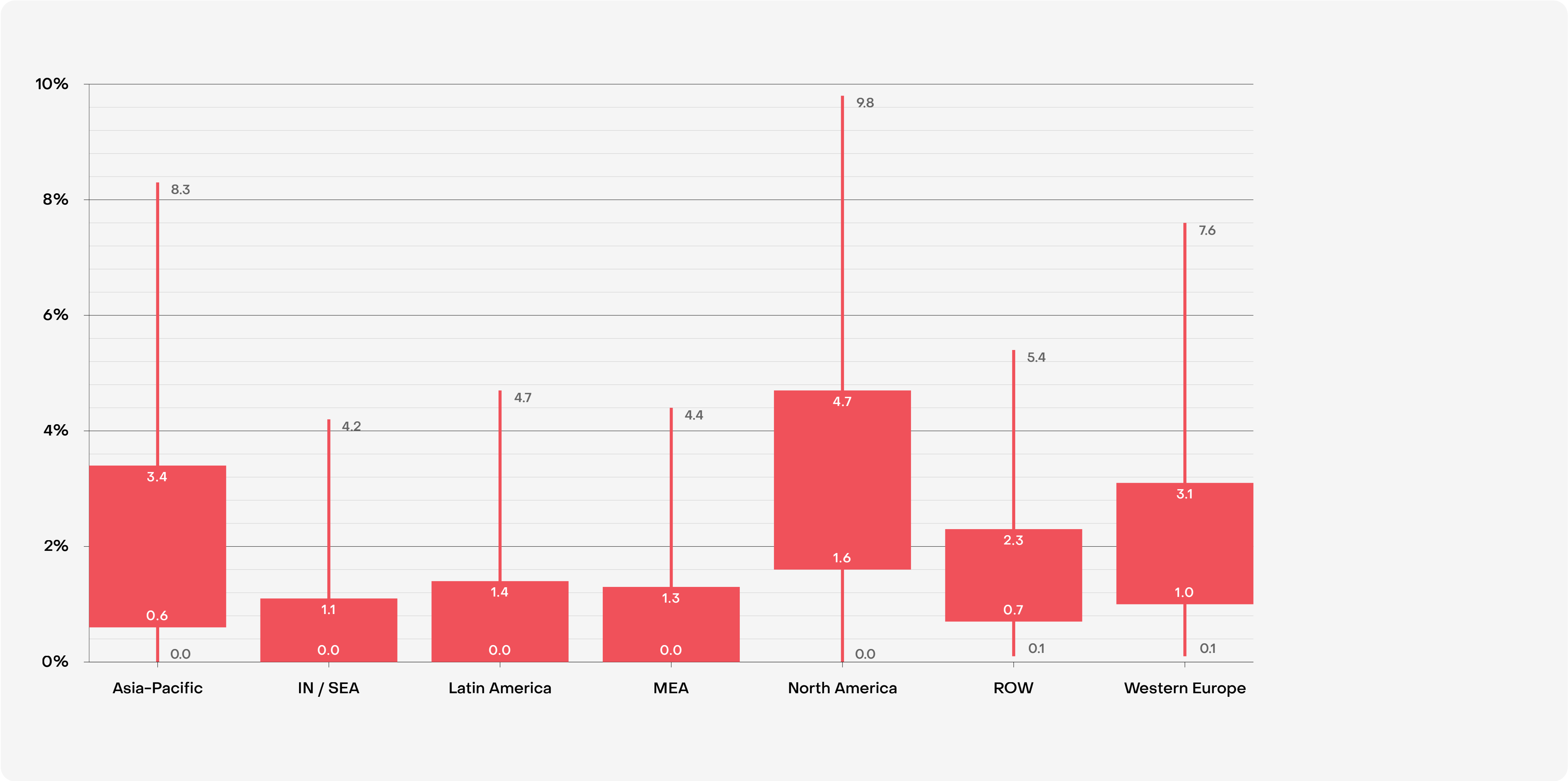
Trial to Paid Conversion Rate, By Geography

Western Europe leads in trial-to-paid conversion, with a median of 35.8% and a P90 of 73.6%, highlighting strong monetization potential for trials in this region.



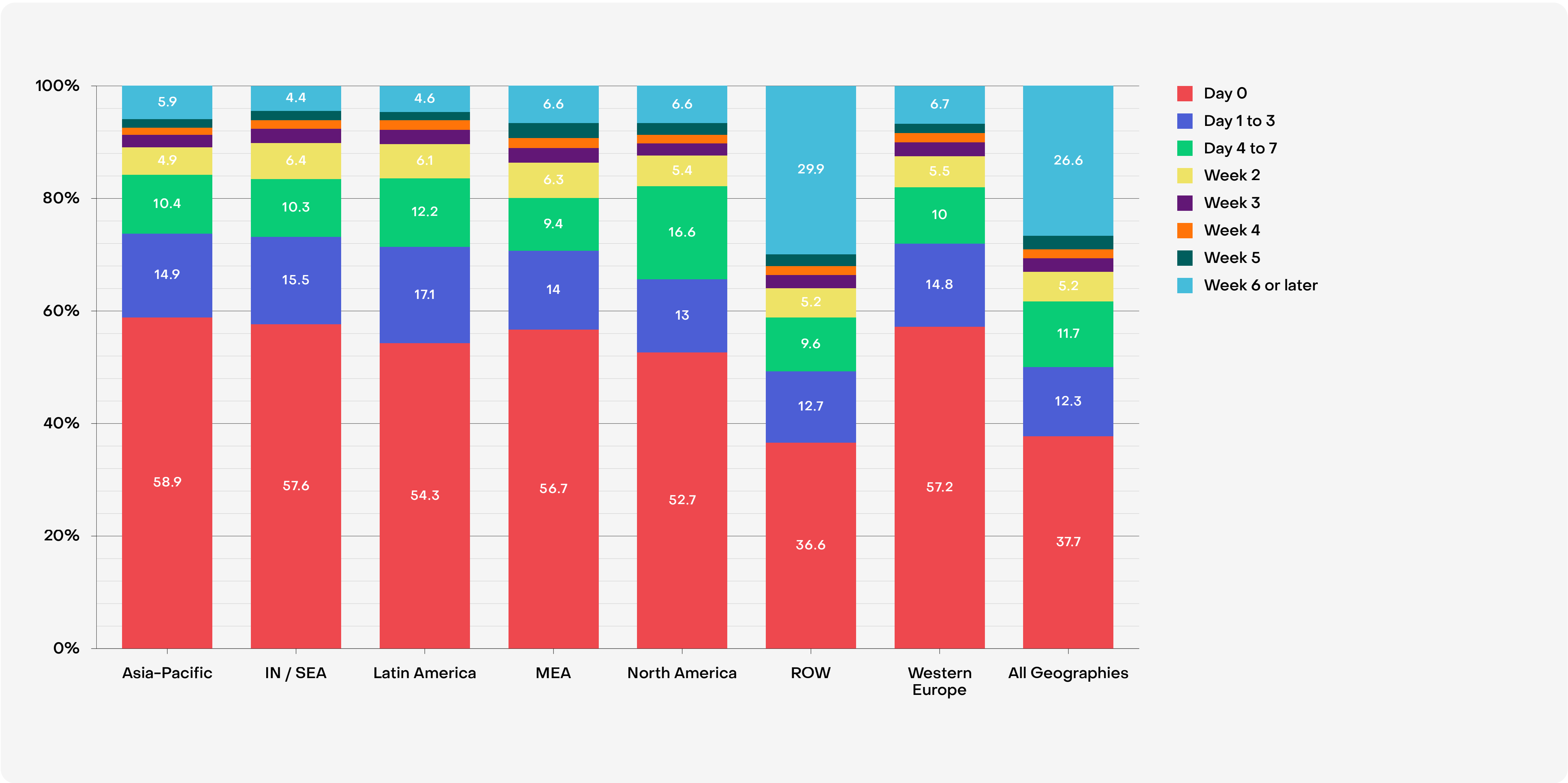
Day 35 Download to Paid Conversion Rate, By Geography

North America has the highest conversion rate from downloads to paid users, with a median of 1.6%, reinforcing strong willingness to pay for entertainment content.



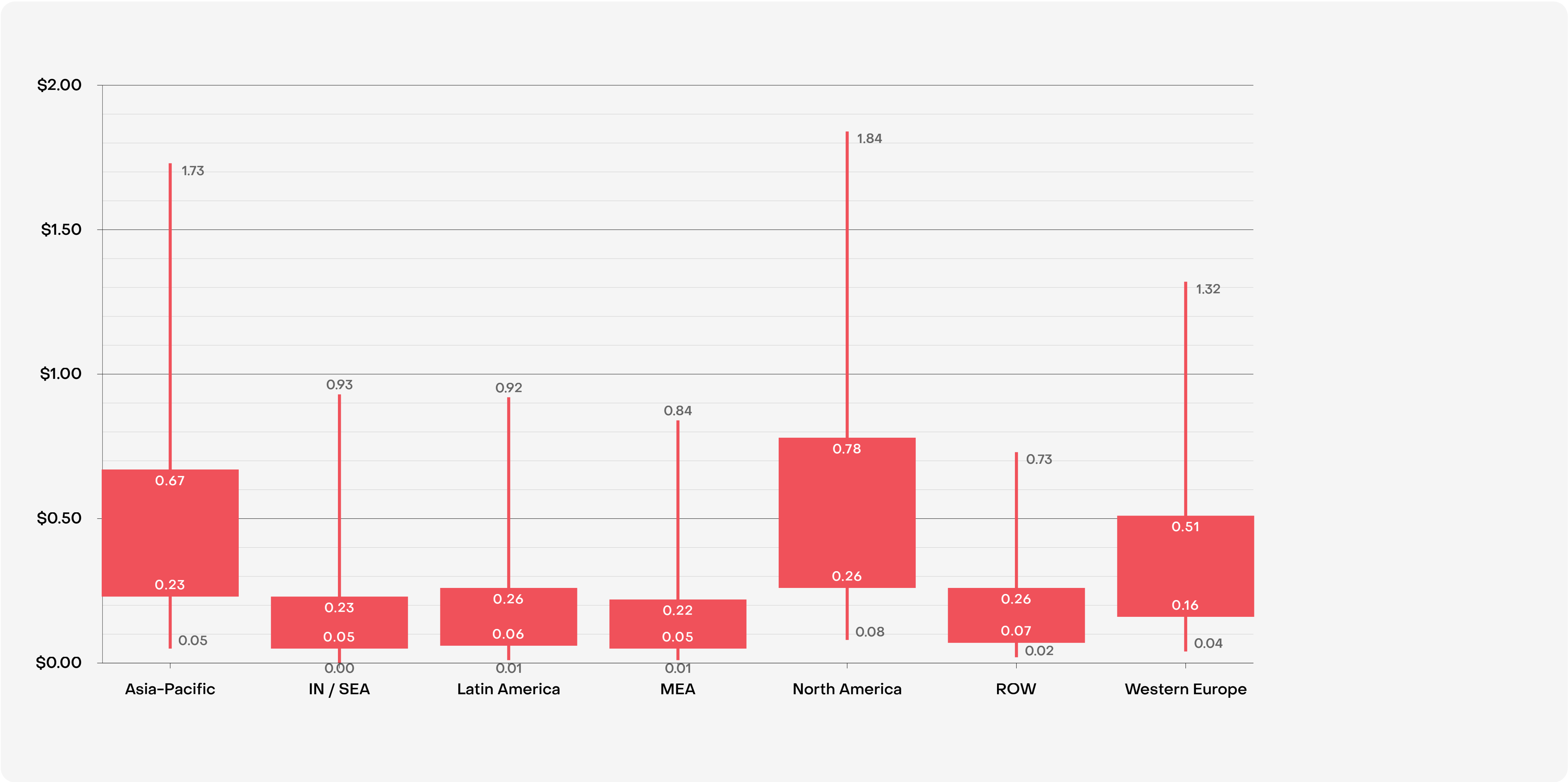
Time to Paid, By Geography

Over half of users convert on Day 0 across all regions, peaking at 58.9% in Asia-Pacific, suggesting that immediate engagement is key to driving paid subscriptions.



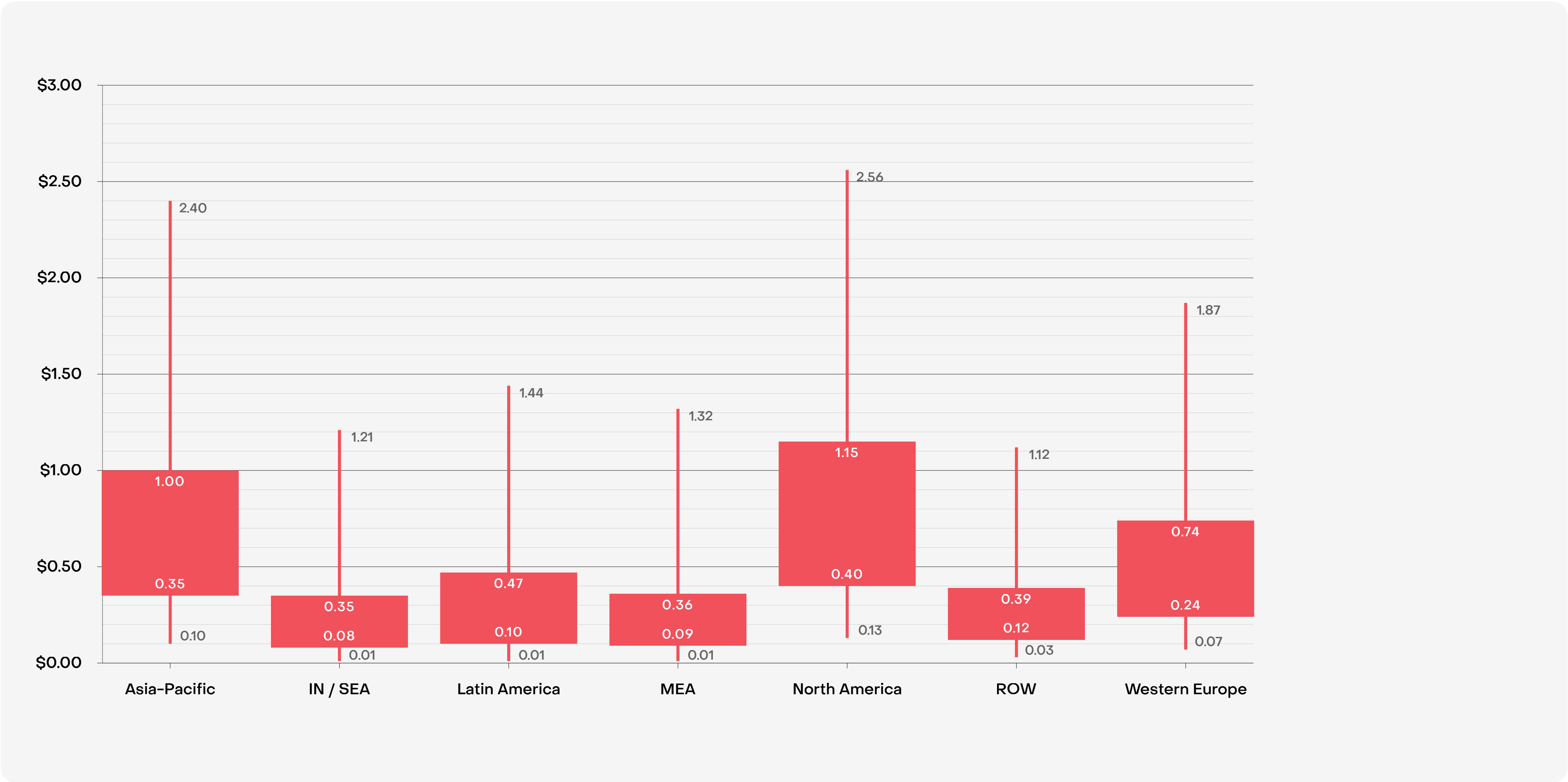
Day 14 Revenue per Install, By Geography

North America generates the highest early revenue, with a median of \$0.26, reflecting stronger purchasing power and willingness to pay for premium content.



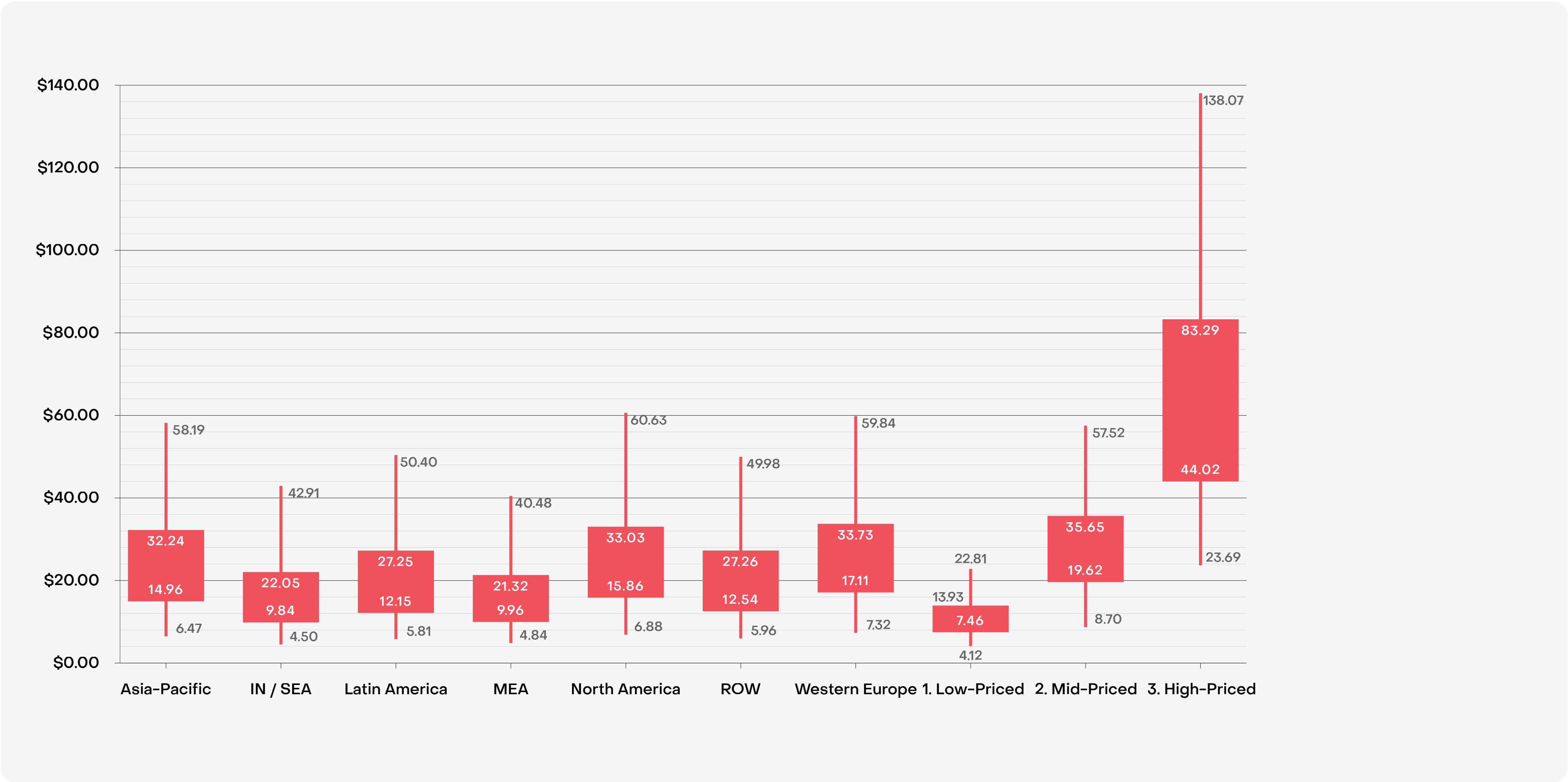
Day 60 Revenue per Install, By Geography

Revenue per install increases significantly over time, with North America reaching a median of \$0.40 by Day 60, reinforcing the value of retention and recurring payments.



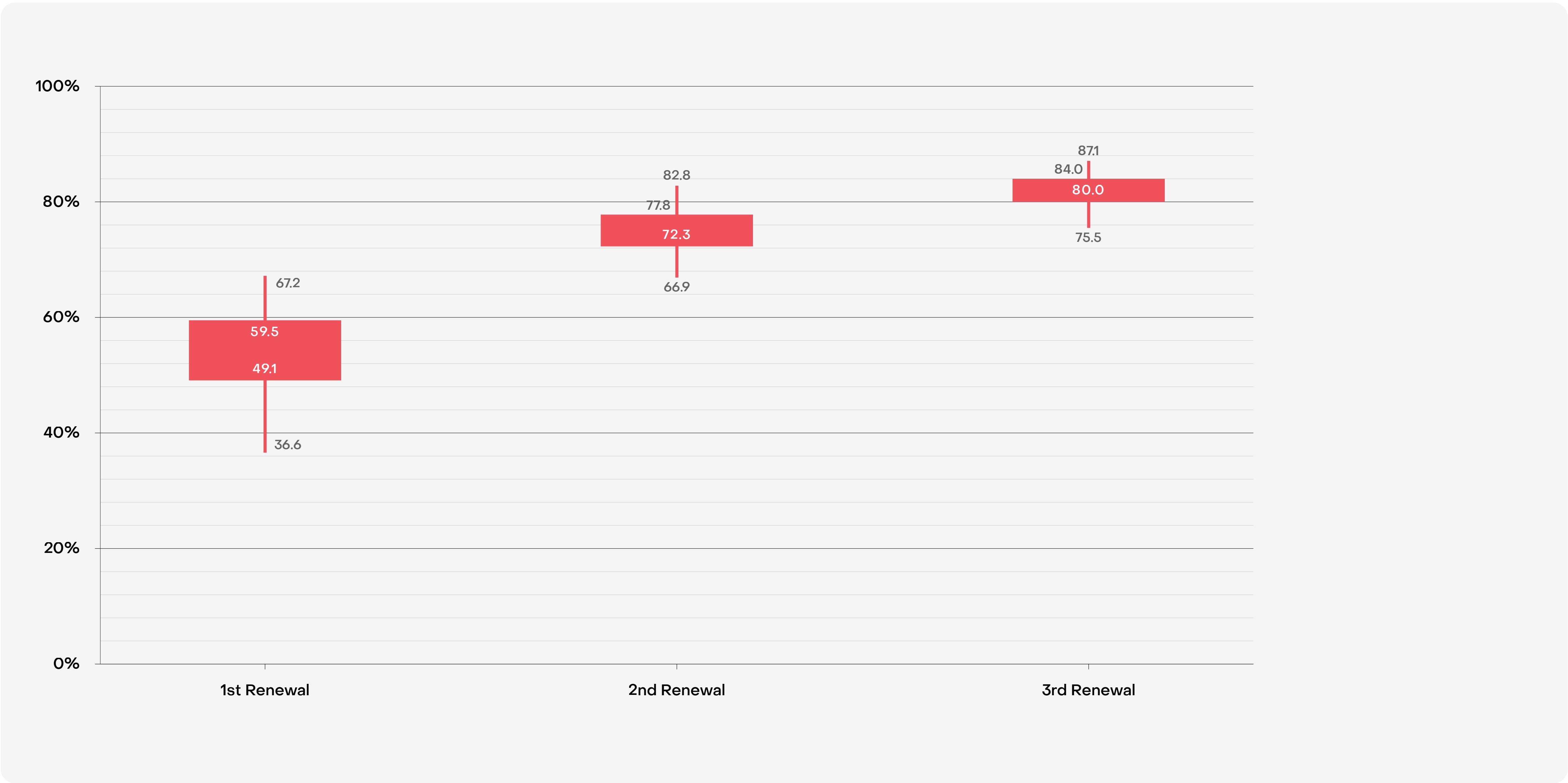
Year 1 Realized LTV per Payer, By Geography and Price Point

Western Europe leads in payer LTV, with a median of \$17.11, slightly ahead of North America at \$15.86, reflecting strong long-term monetization potential in both regions.



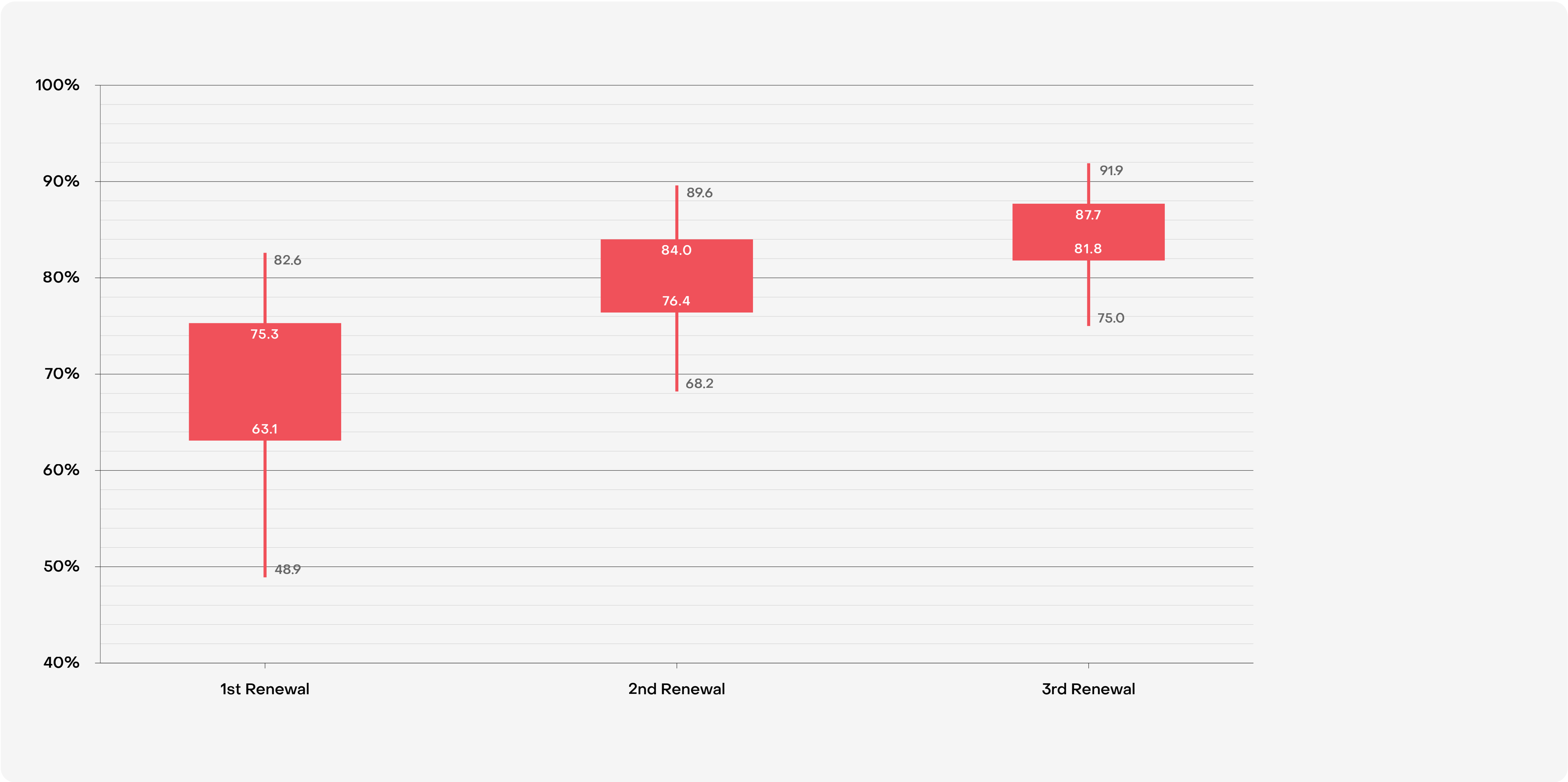
First 3 Weekly Renewals

By the third renewal, retention stabilizes at 80.0%, suggesting that users who stay subscribed beyond the first few weeks are likely to continue long-term.



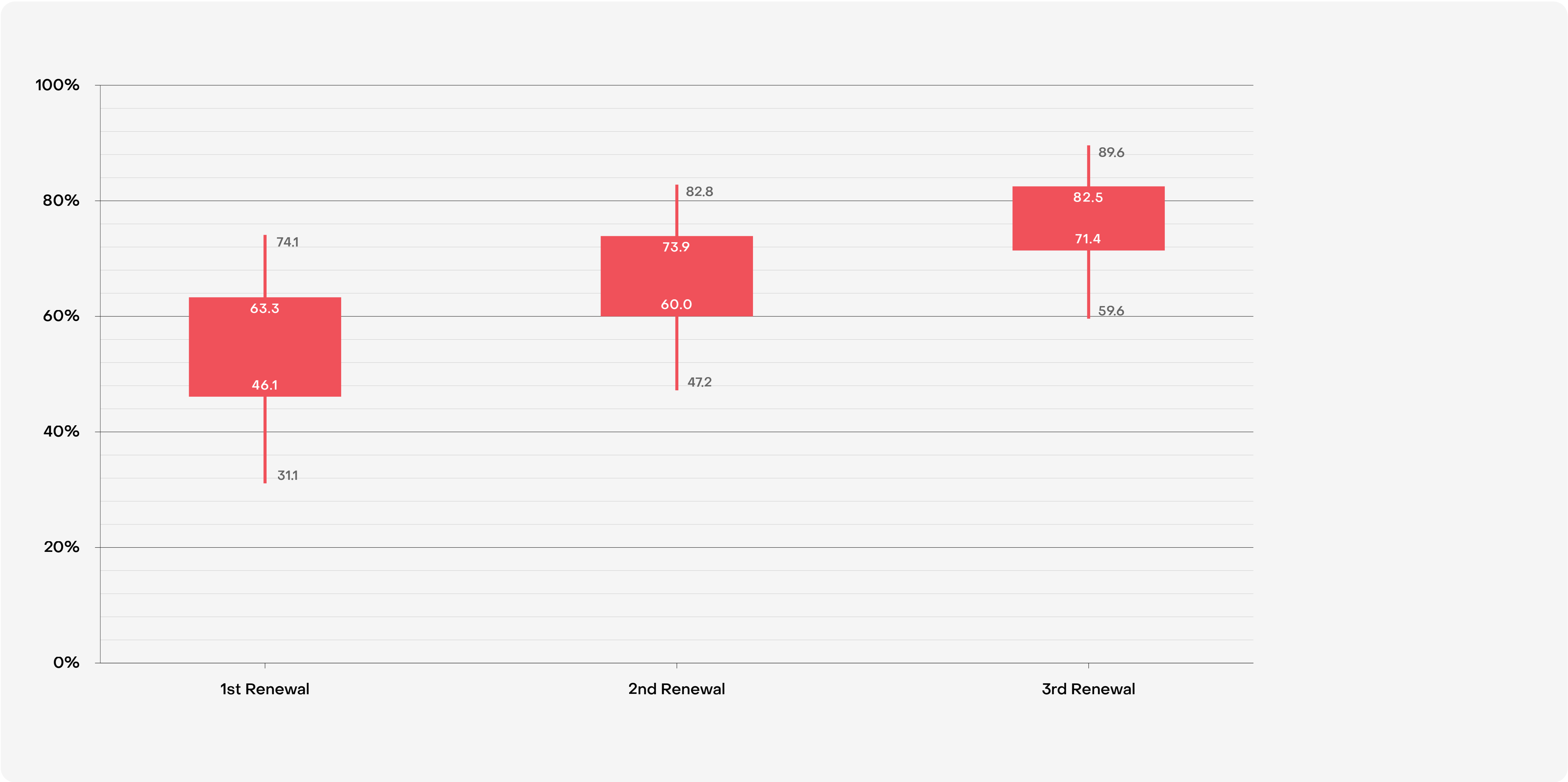
First 3 Monthly Renewals

Long-term engagement remains high, with 81.8% of third-month renewals staying subscribed, reinforcing the stickiness of monthly plans in Media & Entertainment apps.



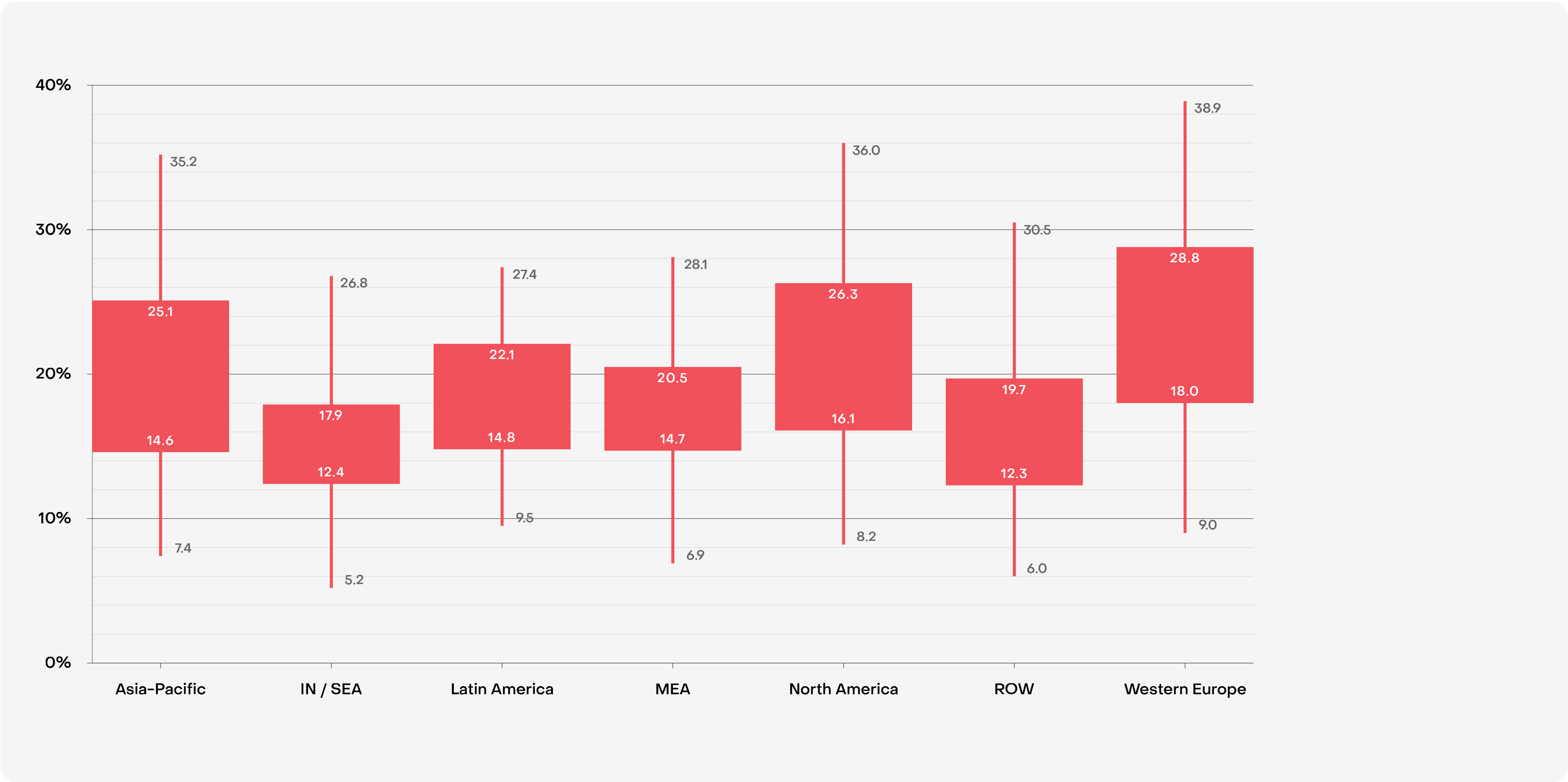
First 3 Annual Renewals

Retention improves significantly in later years, with 71.4% of third-year renewals staying subscribed, showing strong loyalty among long-term users.



Year 1 Retained Monthly Subscribers, By Geography

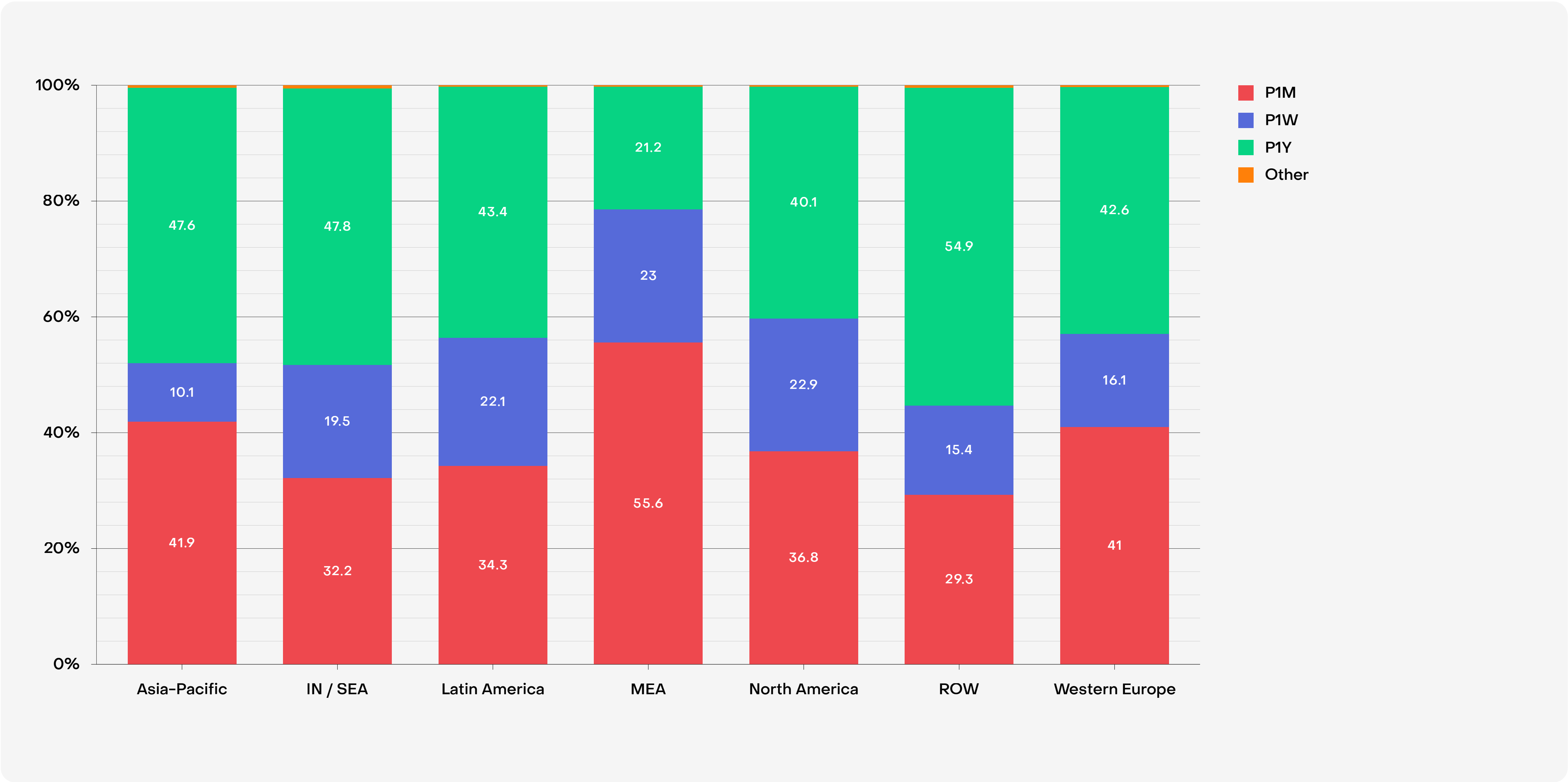
Western Europe has the highest long-term retention, with 18.0% of monthly subscribers remaining after a year, closely followed by North America at 16.1%.



Productivity

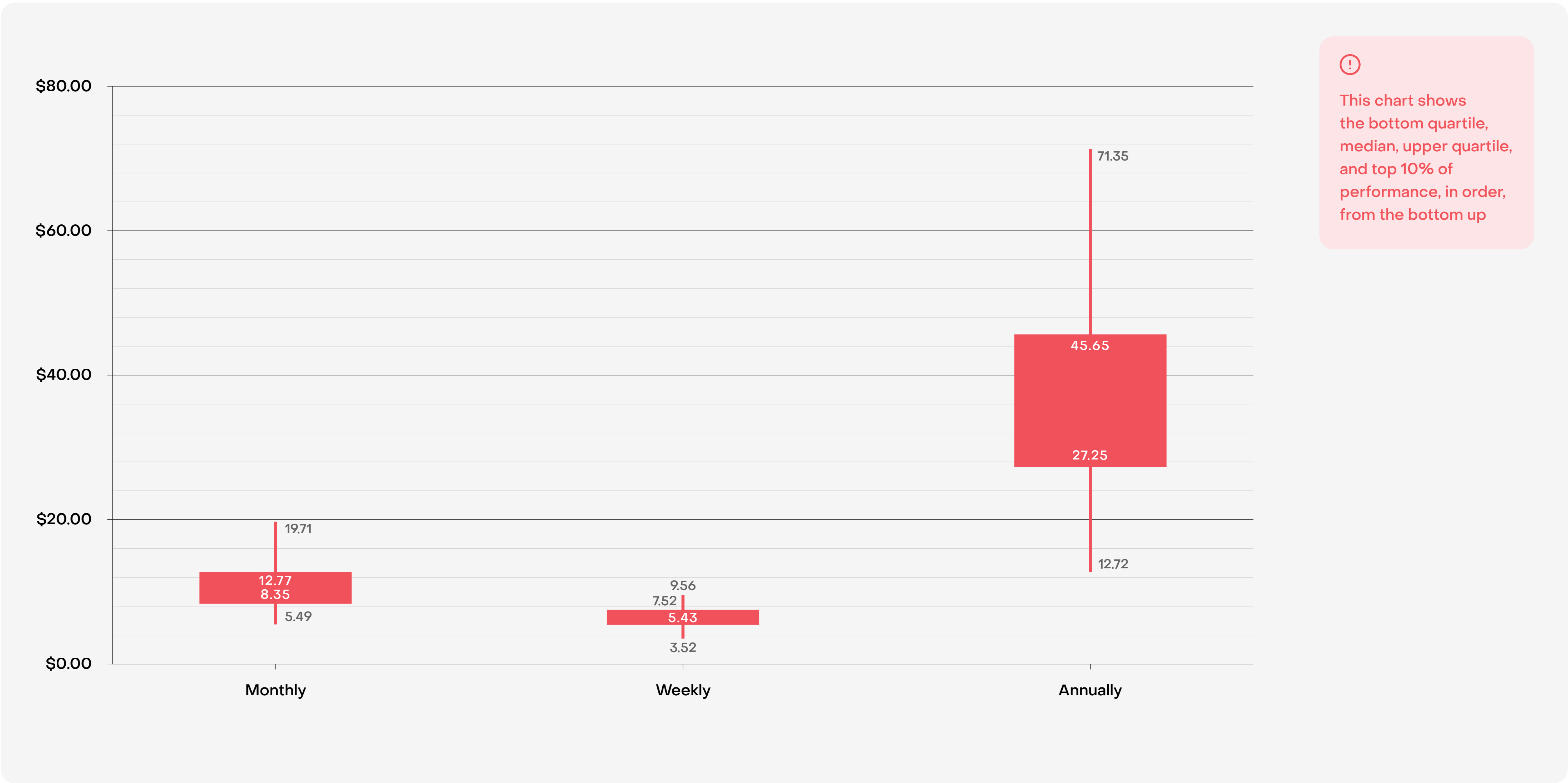
Share of Subscriptions Sold, By Geography

MEA stands out with a majority of sales from monthly plans (55.6%), suggesting a preference for flexibility over long-term subscriptions in this market.



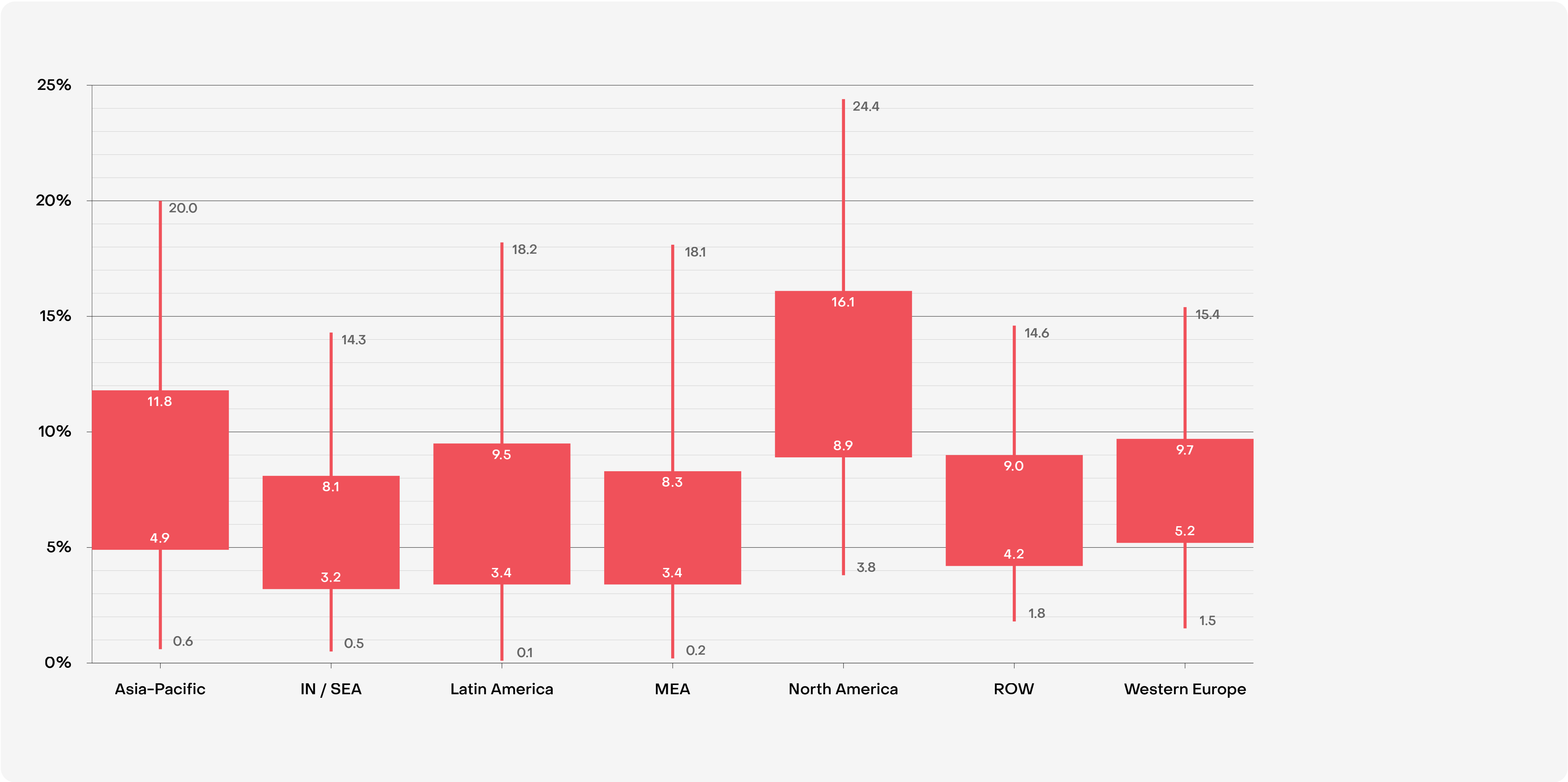
Price Points per Plan Duration

Annual plans offer strong value, with a median price of \$27.25—just over three times the monthly median of \$8.35—encouraging users to commit for a longer period.



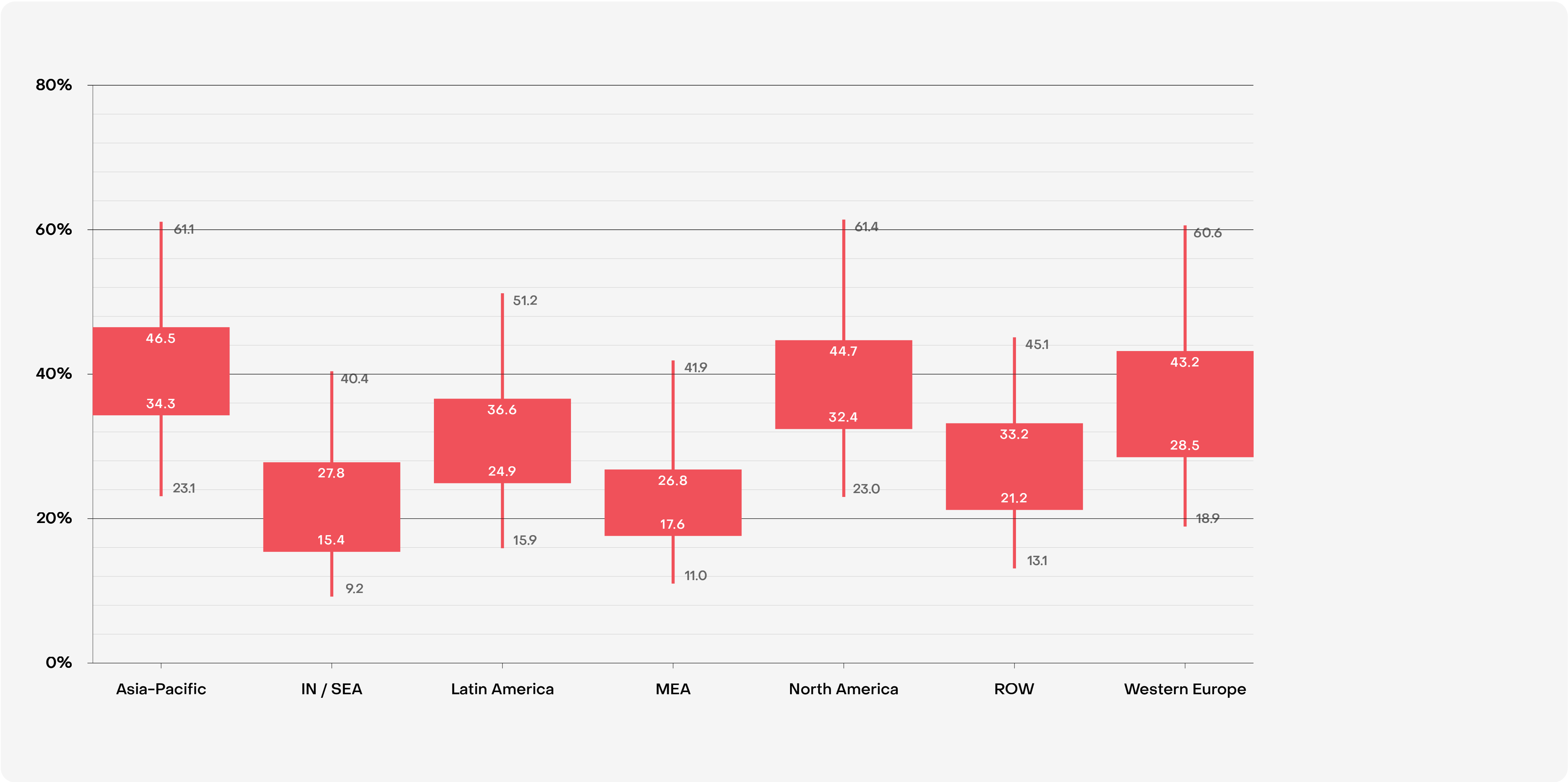
Trial Start Rate, By Geography

Emerging markets show lower trial adoption rates, with bottom quartile values near zero, indicating a stronger reliance on direct purchases rather than trial-based acquisition.



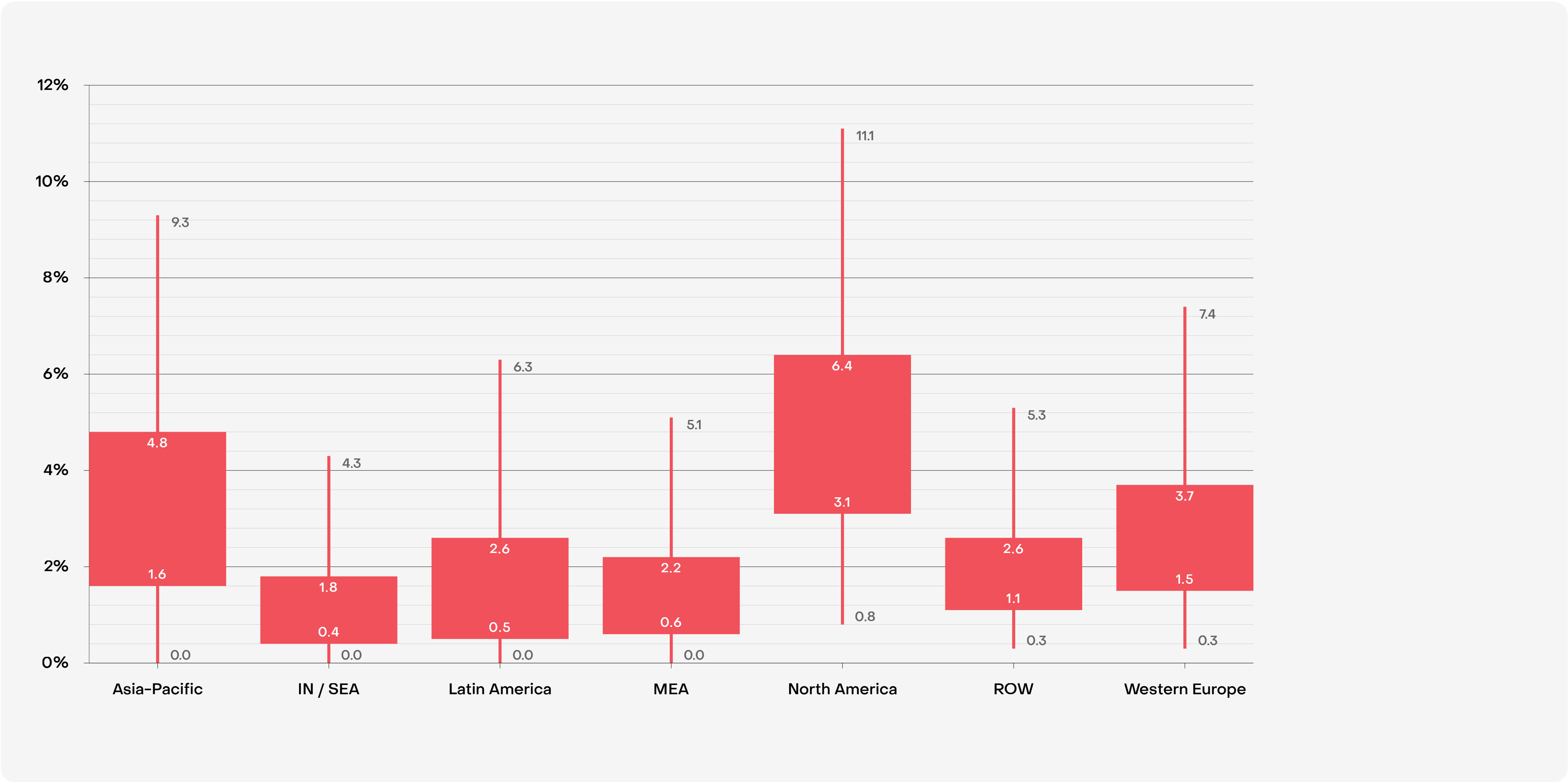
Trial to Paid Conversion Rate, By Geography

Asia-Pacific and North America show strong trial-to-paid conversion, both exceeding 32% at the median, indicating high engagement with productivity tools.



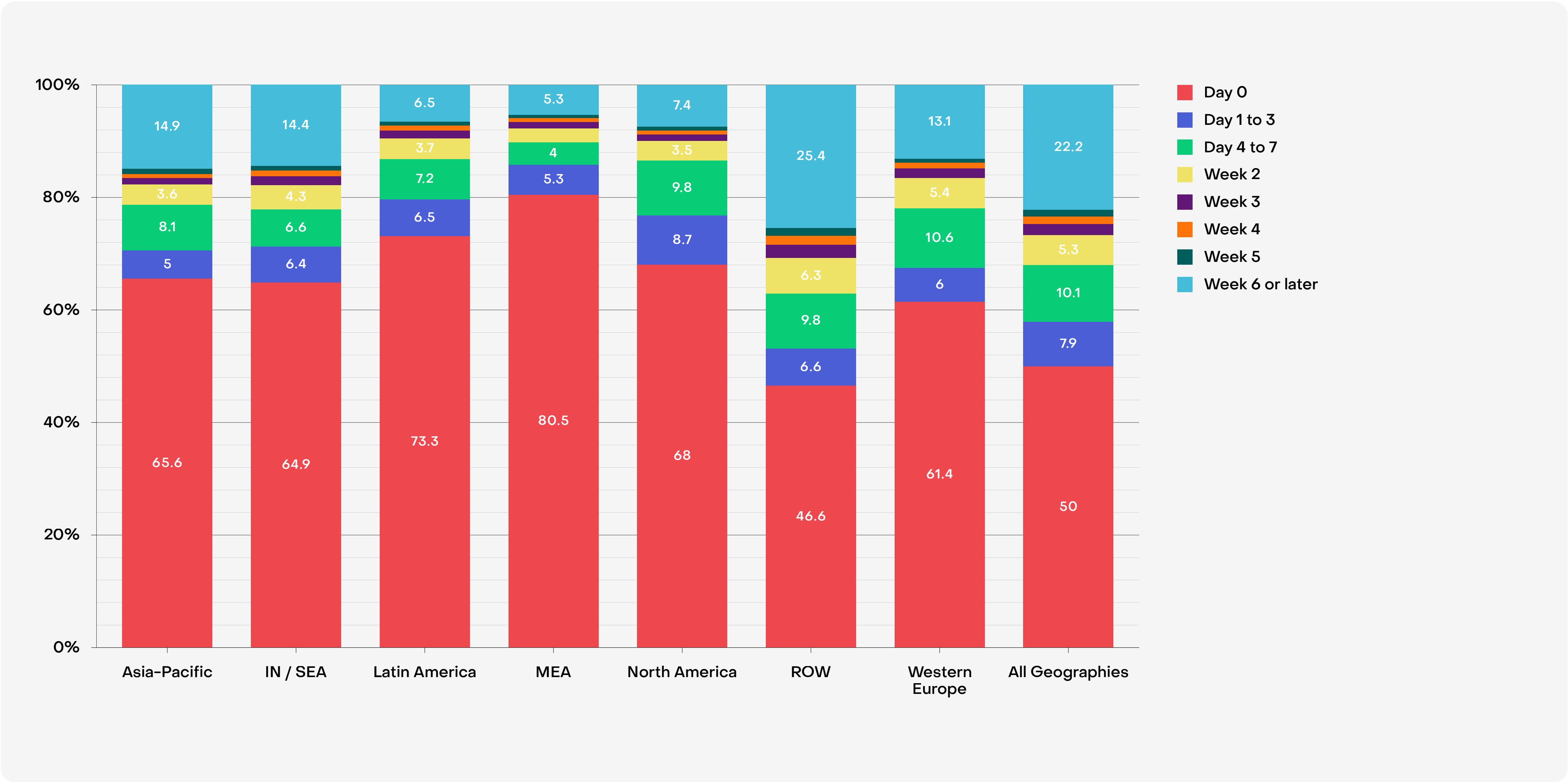
Day 35 Download to Paid Conversion Rate, By Geography

India/Southeast Asia and Latin America struggle with conversions, with median rates below 0.5%, indicating a reliance on free-tier usage rather than paid upgrades.



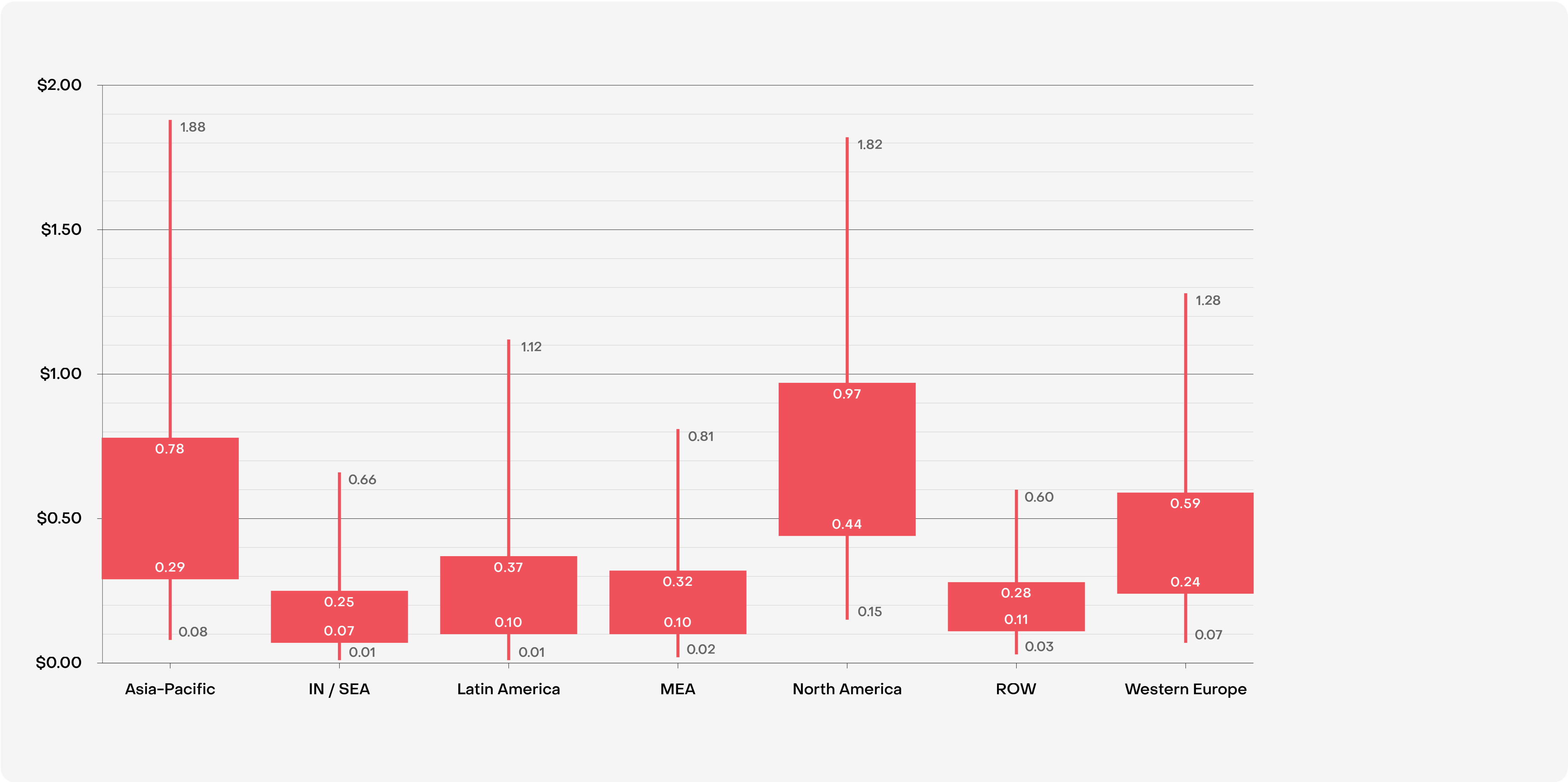
Time to Paid, By Geography

The majority of users convert on Day 0, with rates exceeding 60% in most regions, highlighting the immediate value users see in productivity apps.



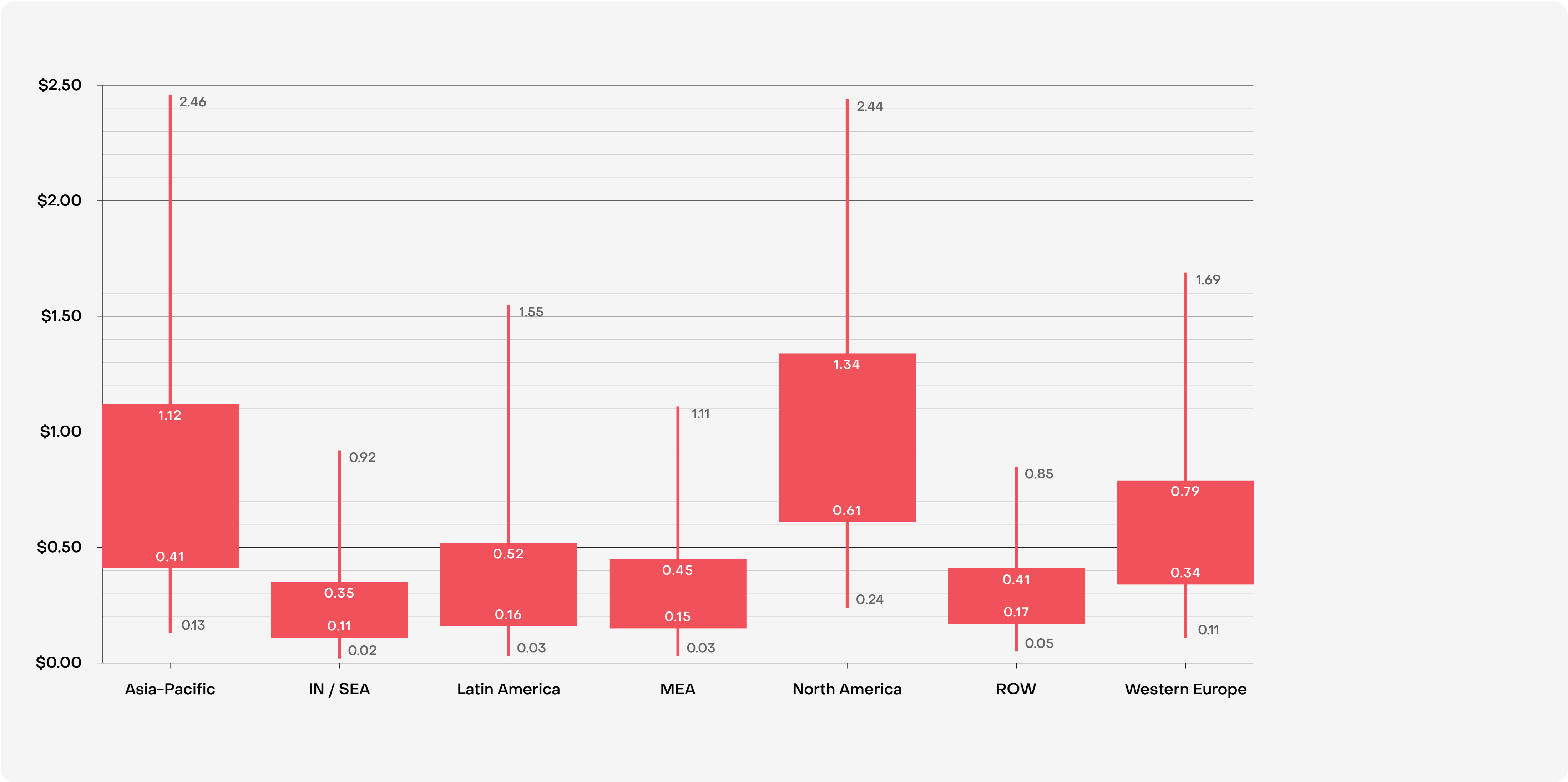
Day 14 Revenue per Install, By Geography

North America leads in early monetization, with a median revenue per install of \$0.44 by Day 14, reflecting a strong willingness to pay for productivity solutions.



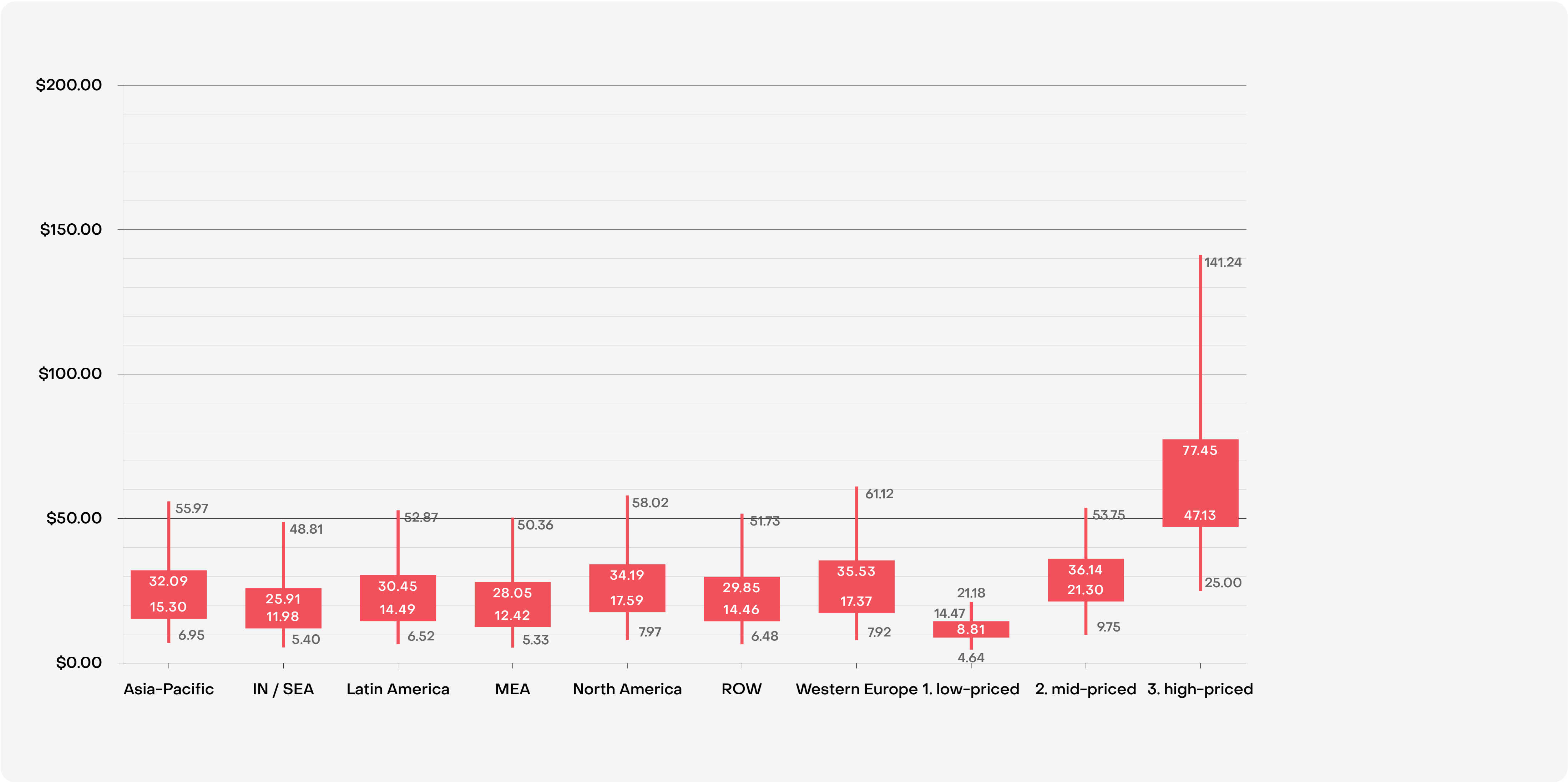
Day 60 Revenue per Install, By Geography

Latin America and MEA see lower long-term monetization, with median values of \$0.16 and \$0.15, respectively, suggesting a need for different pricing or engagement strategies.



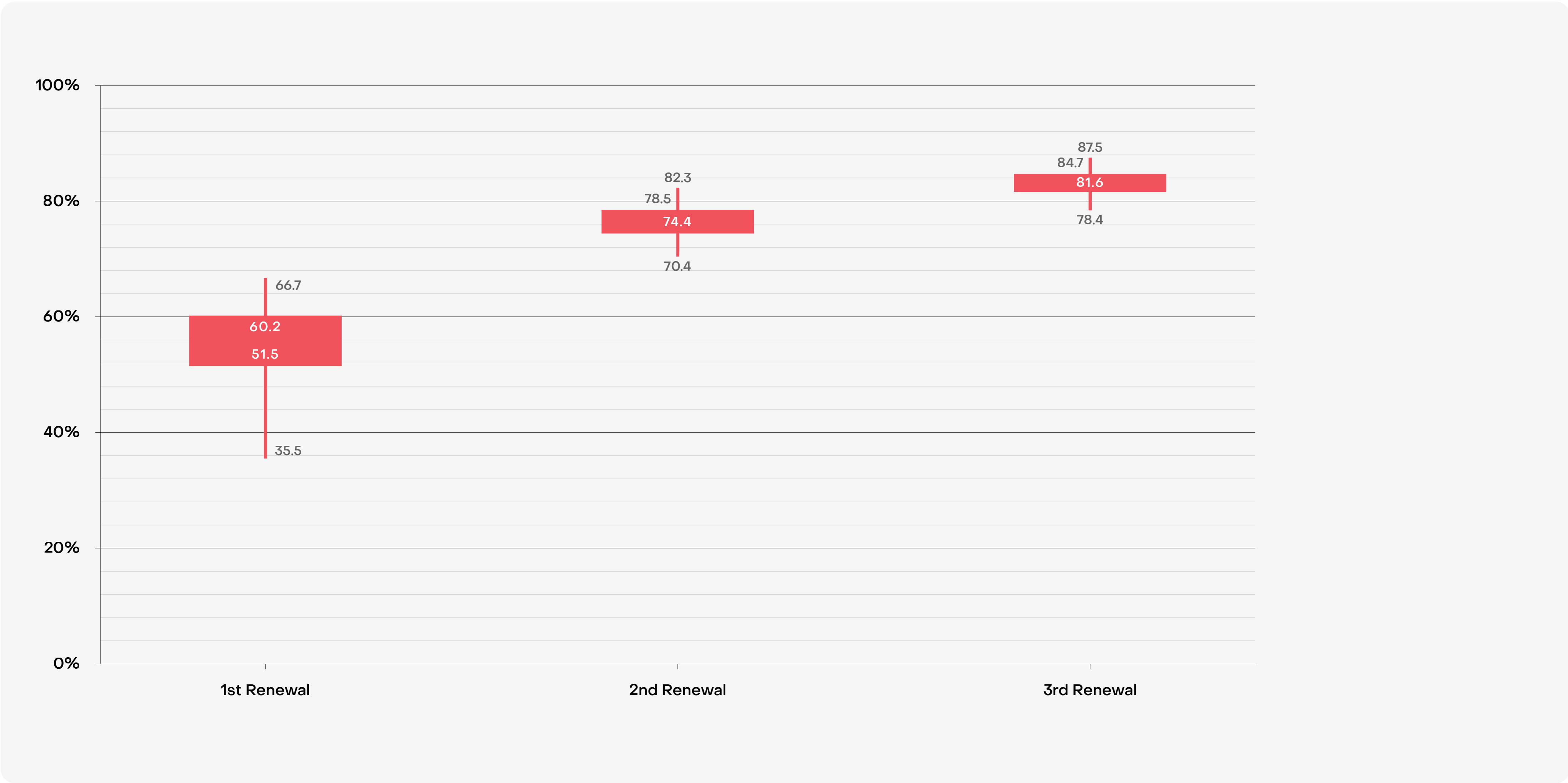
Year 1 Realized LTV per Payer, By Geography and Price Point

High-priced plans generate the highest payer LTV, with a median of \$47.13, nearly double that of mid-priced plans at \$21.30, reinforcing the value of premium offerings.



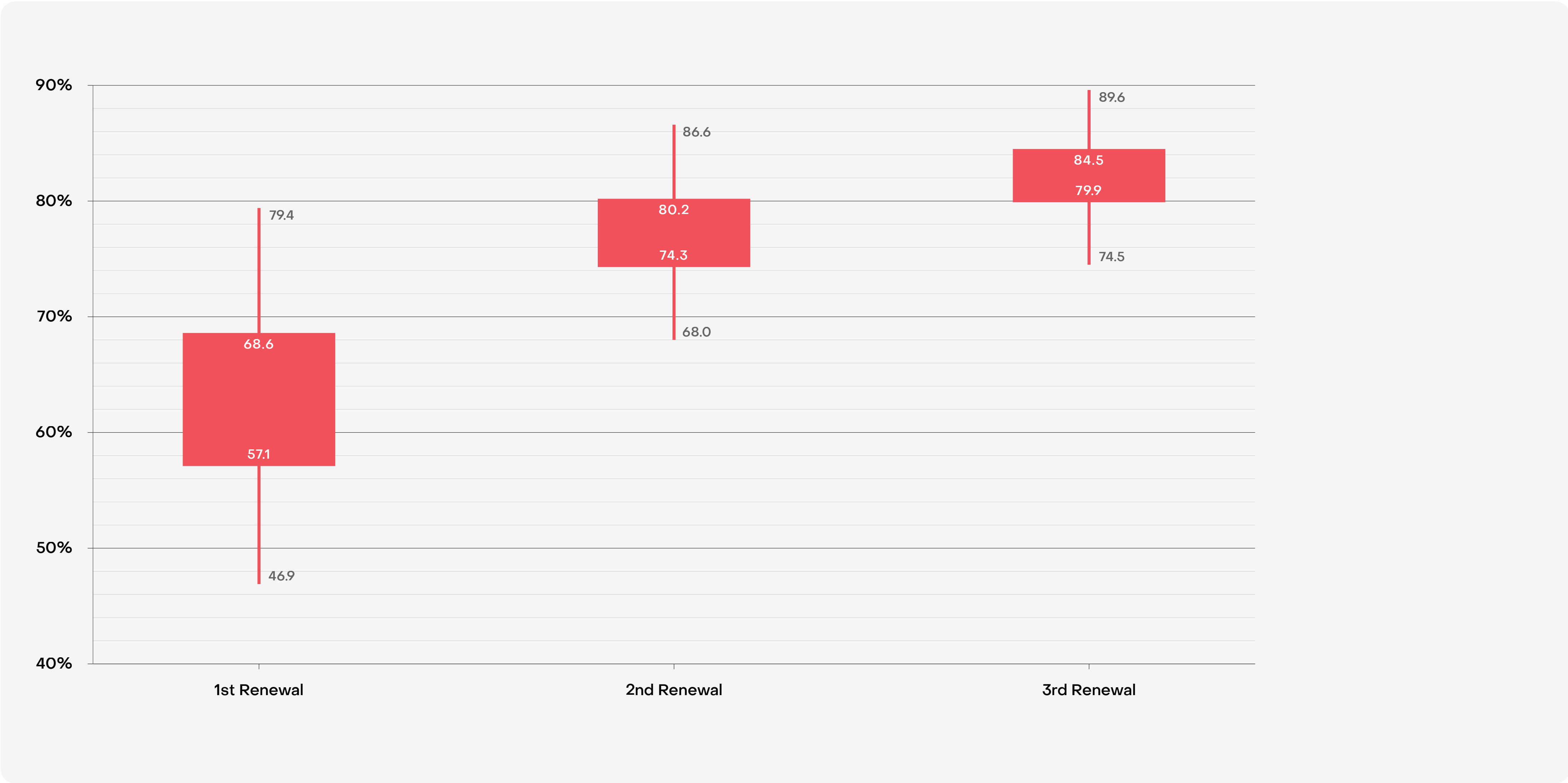
First 3 Weekly Renewals

Renewal rates improve significantly after the first cycle, jumping from 51.5% at Renewal 1 to 74.4% at Renewal 2, showing strong engagement among retained weekly subscribers.



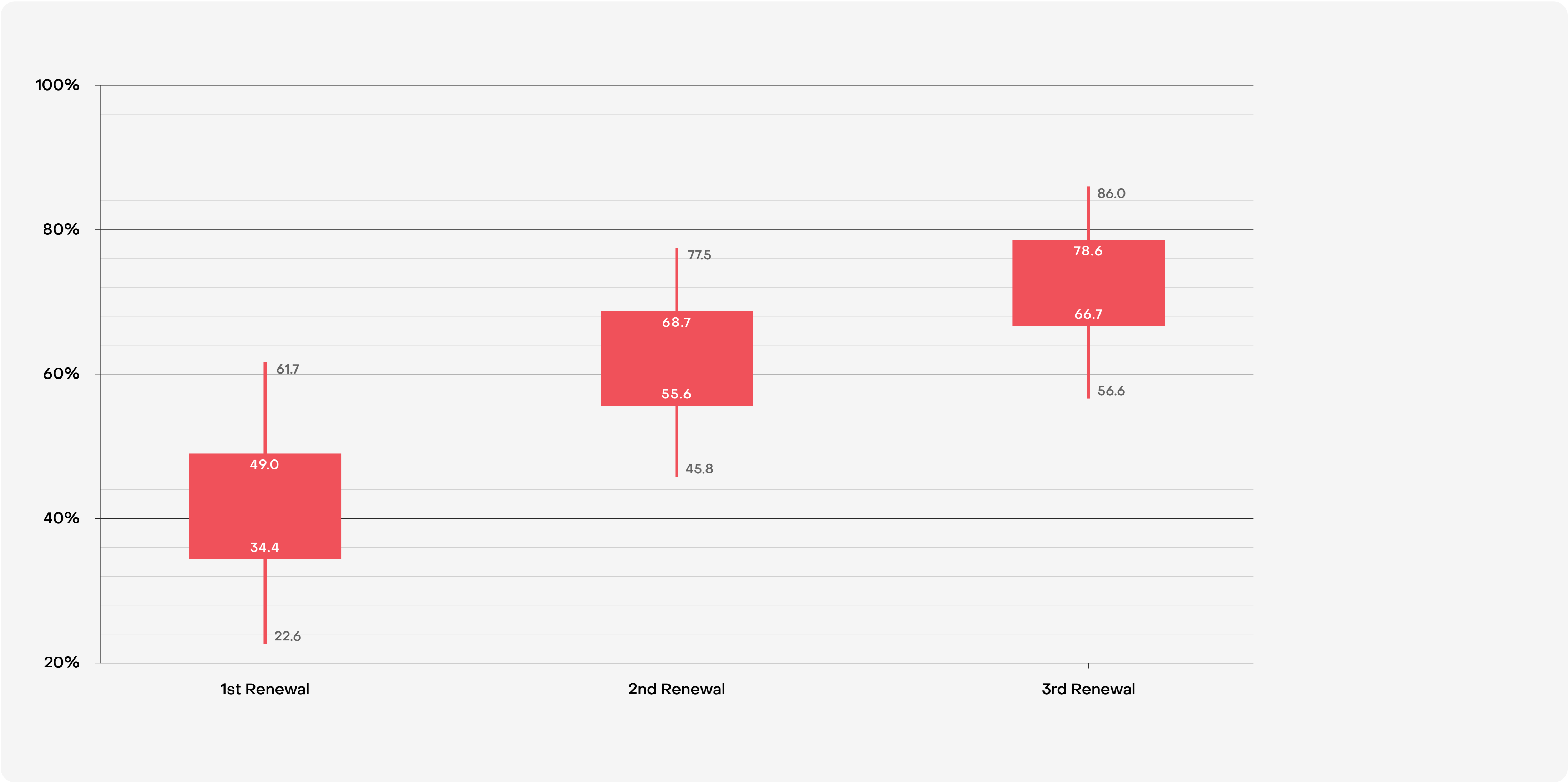
First 3 Monthly Renewals

Long-term engagement remains high, with 79.9% of third-month renewals staying subscribed, reinforcing the stickiness of monthly plans in Productivity apps.



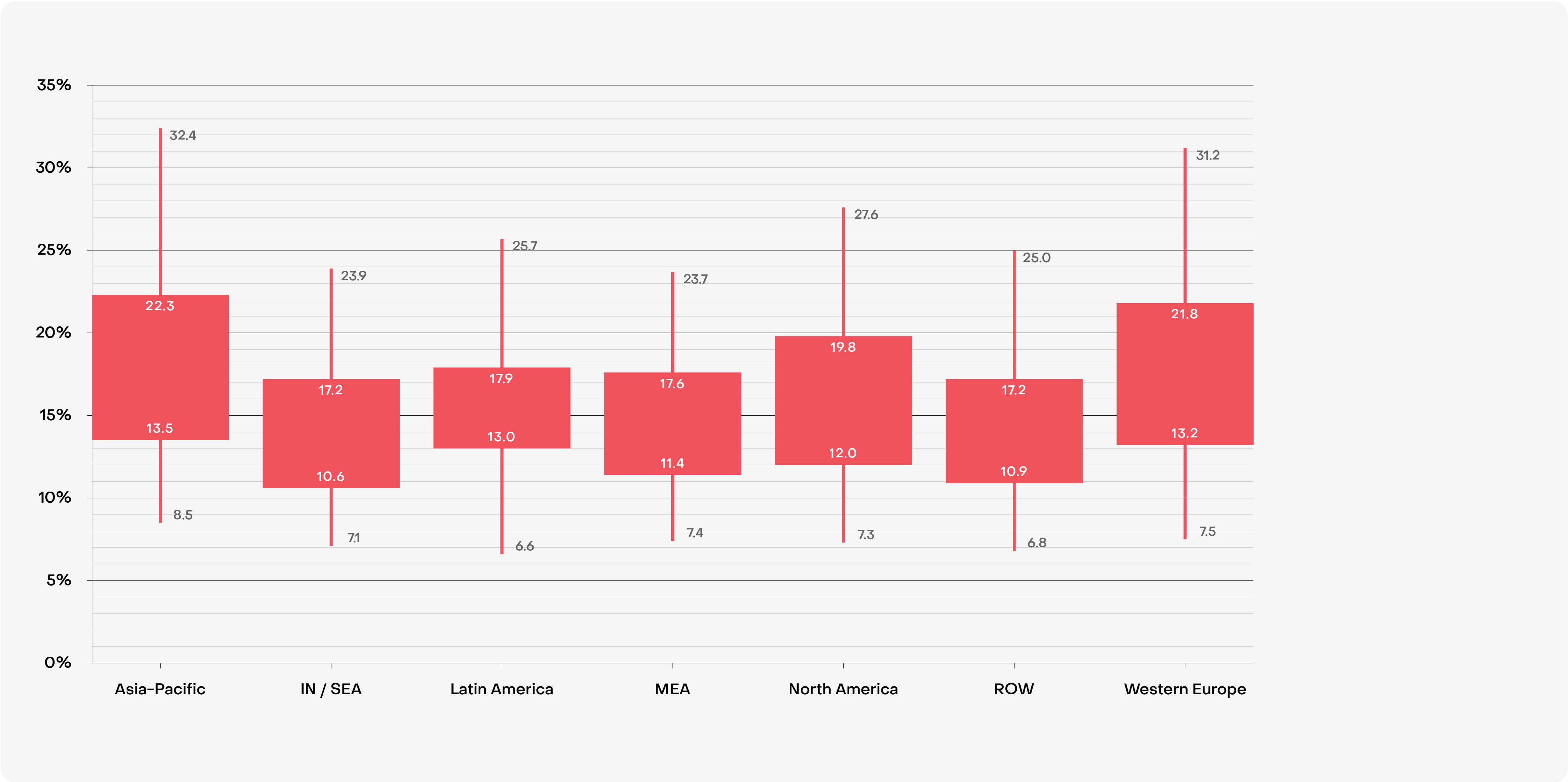
First 3 Annual Renewals

First-year renewal rates for annual plans are lower than shorter durations, with a median of 34.4%, suggesting that users may be hesitant to commit for another full year.



Year 1 Retained Monthly Subscribers, By Geography

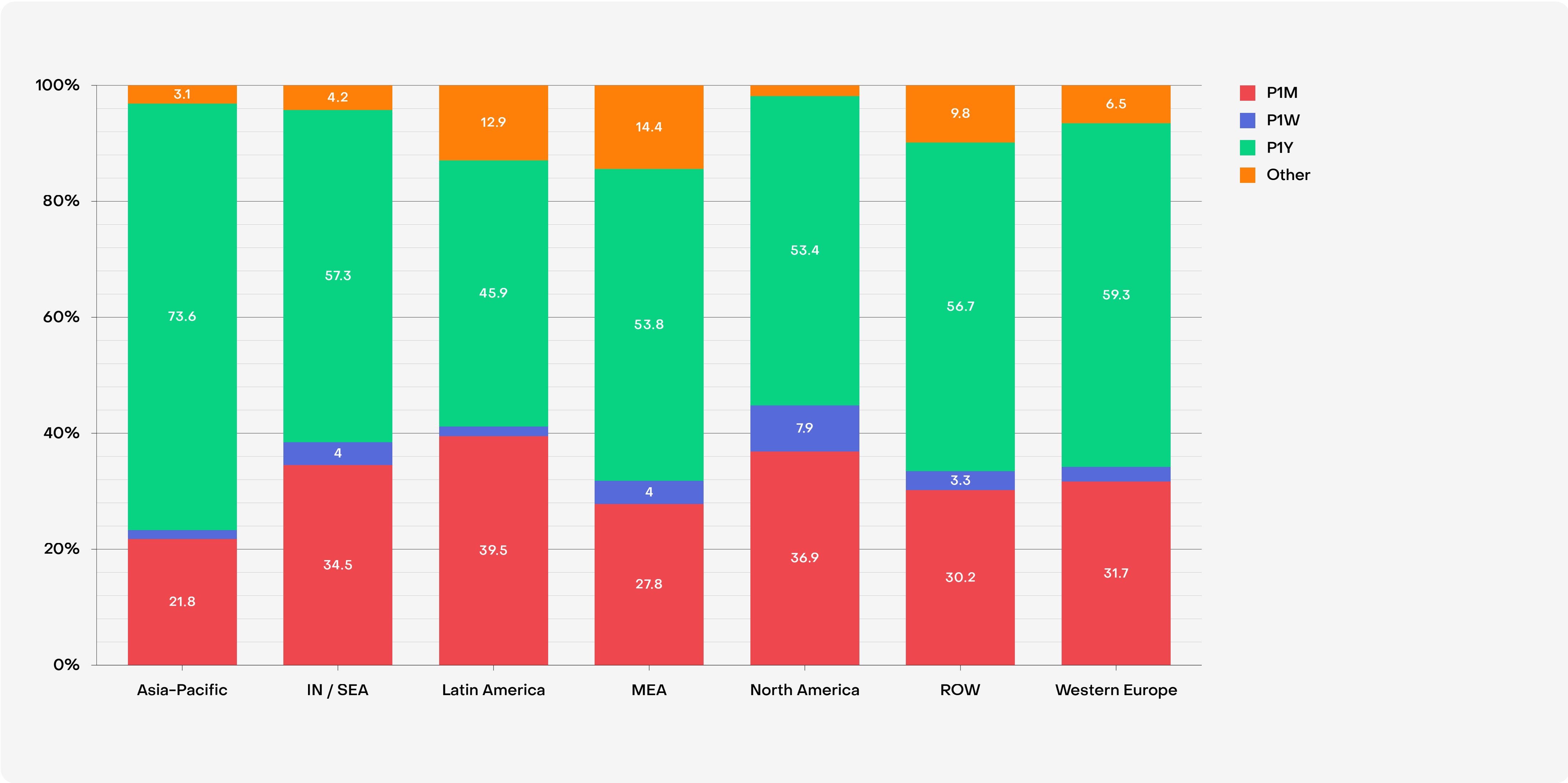
Western Europe has the highest long-term retention, with 13.2% of monthly subscribers remaining after a year, closely followed by Asia-Pacific at 13.5%.



Education

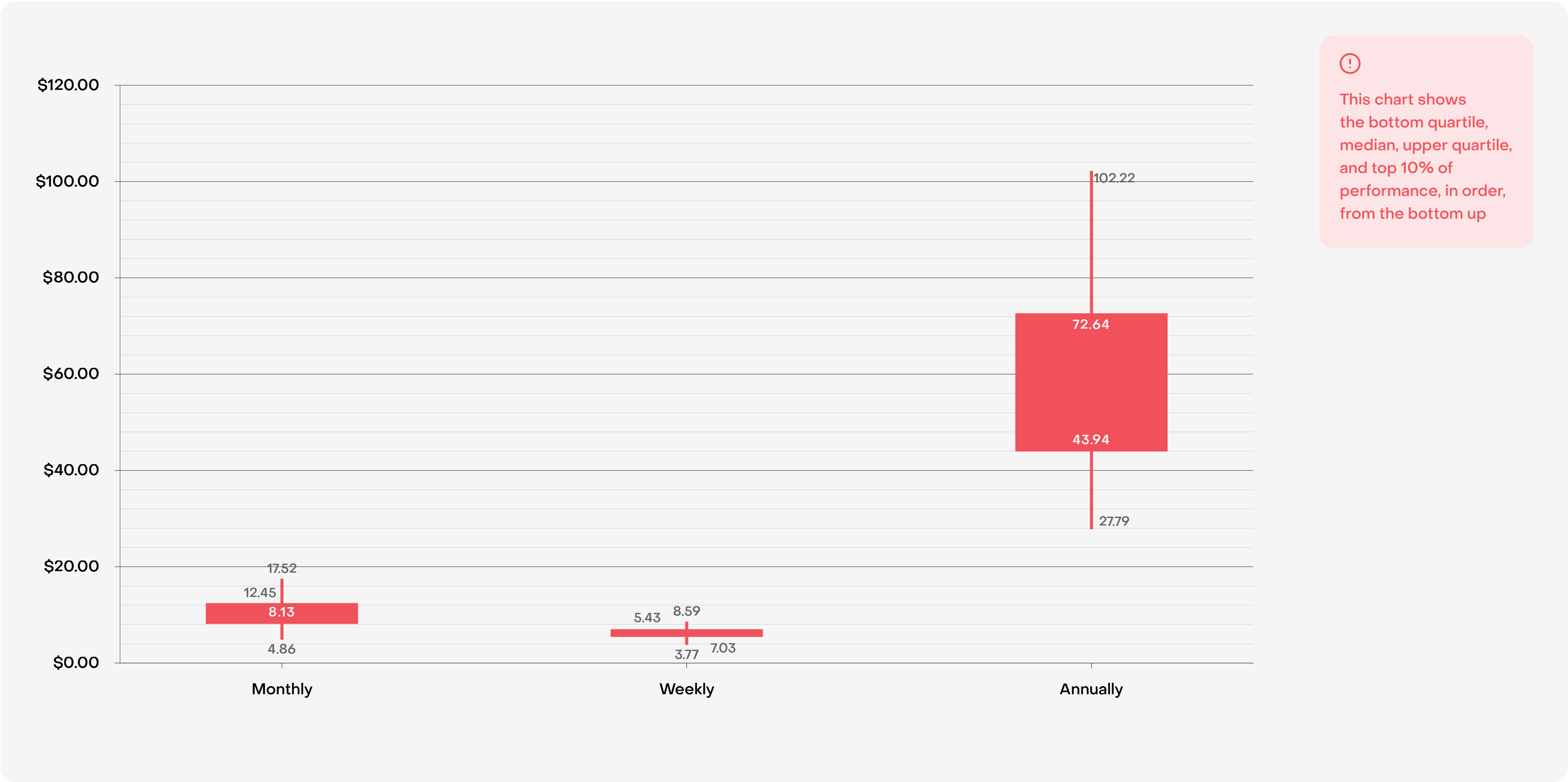
Share of Subscriptions Sold, By Geography

Latin America and MEA have the highest share of “Other” subscription plans at 12.9% and 14.4%, respectively, largely due to quarterly and half-year plans, which are uncommon in other categories.



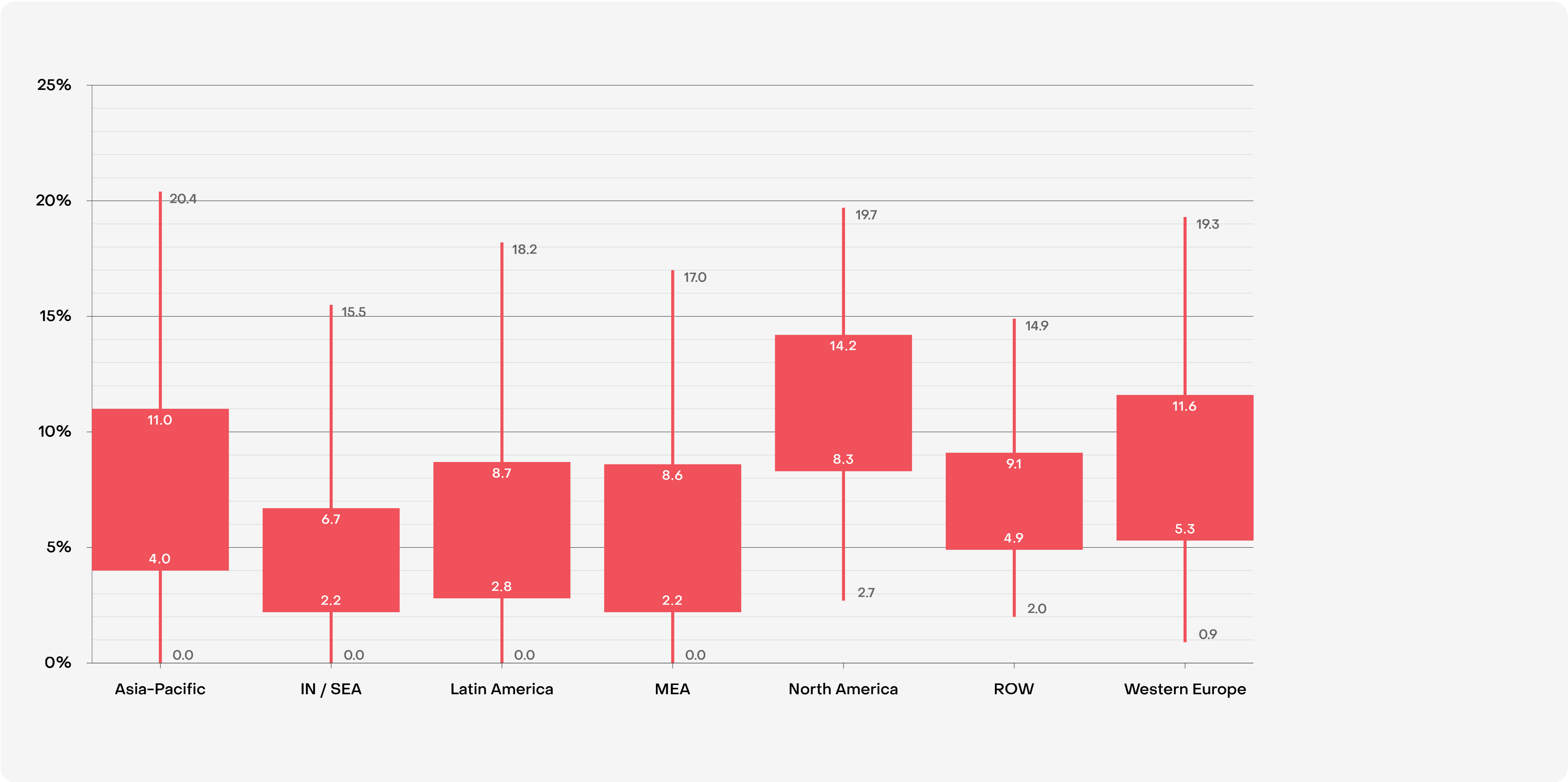
Price Points per Plan Duration

Annual subscriptions command a significant premium, with a median price of \$43.94, more than five times the monthly median of \$8.13, highlighting strong perceived value in long-term education plans.



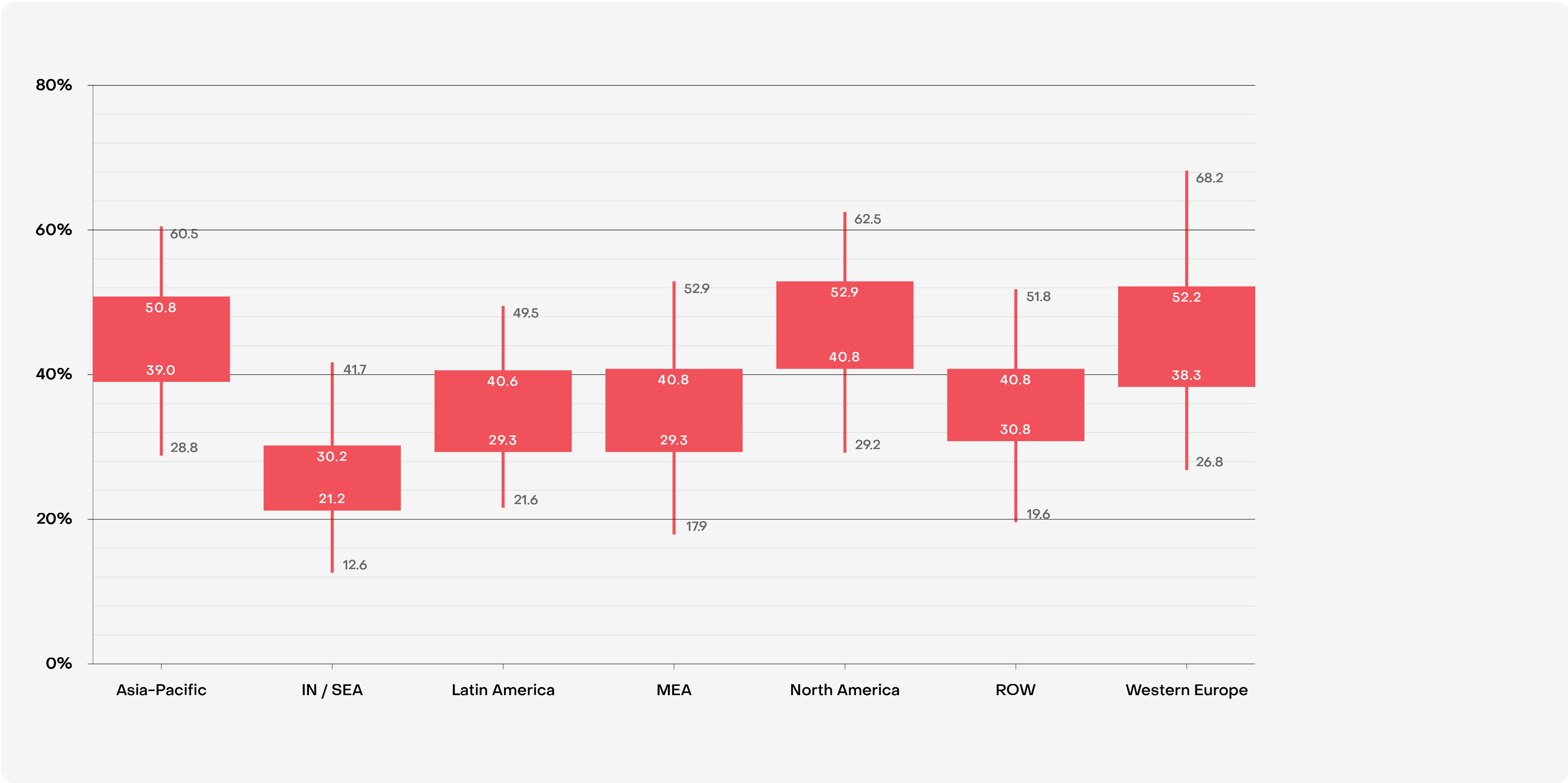
Trial Start Rate, By Geography

North America leads in trial adoption, with a median start rate of 8.3%, indicating that users are more inclined to test educational apps before committing to a paid plan.



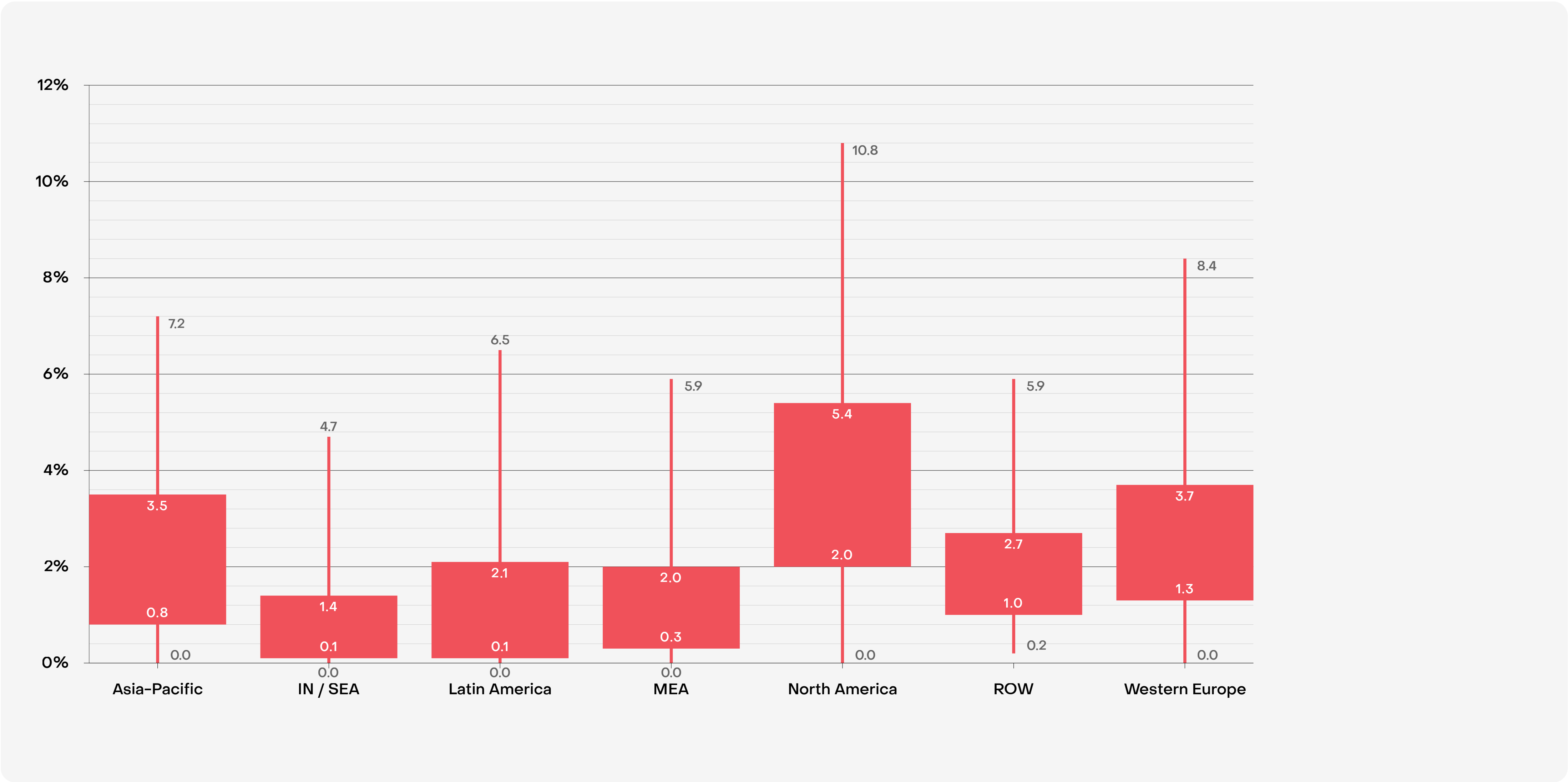
Trial to Paid Conversion Rate, By Geography

Western Europe and North America see the strongest trial-to-paid conversion, with median rates above 38%, reinforcing the effectiveness of trials in converting engaged learners.



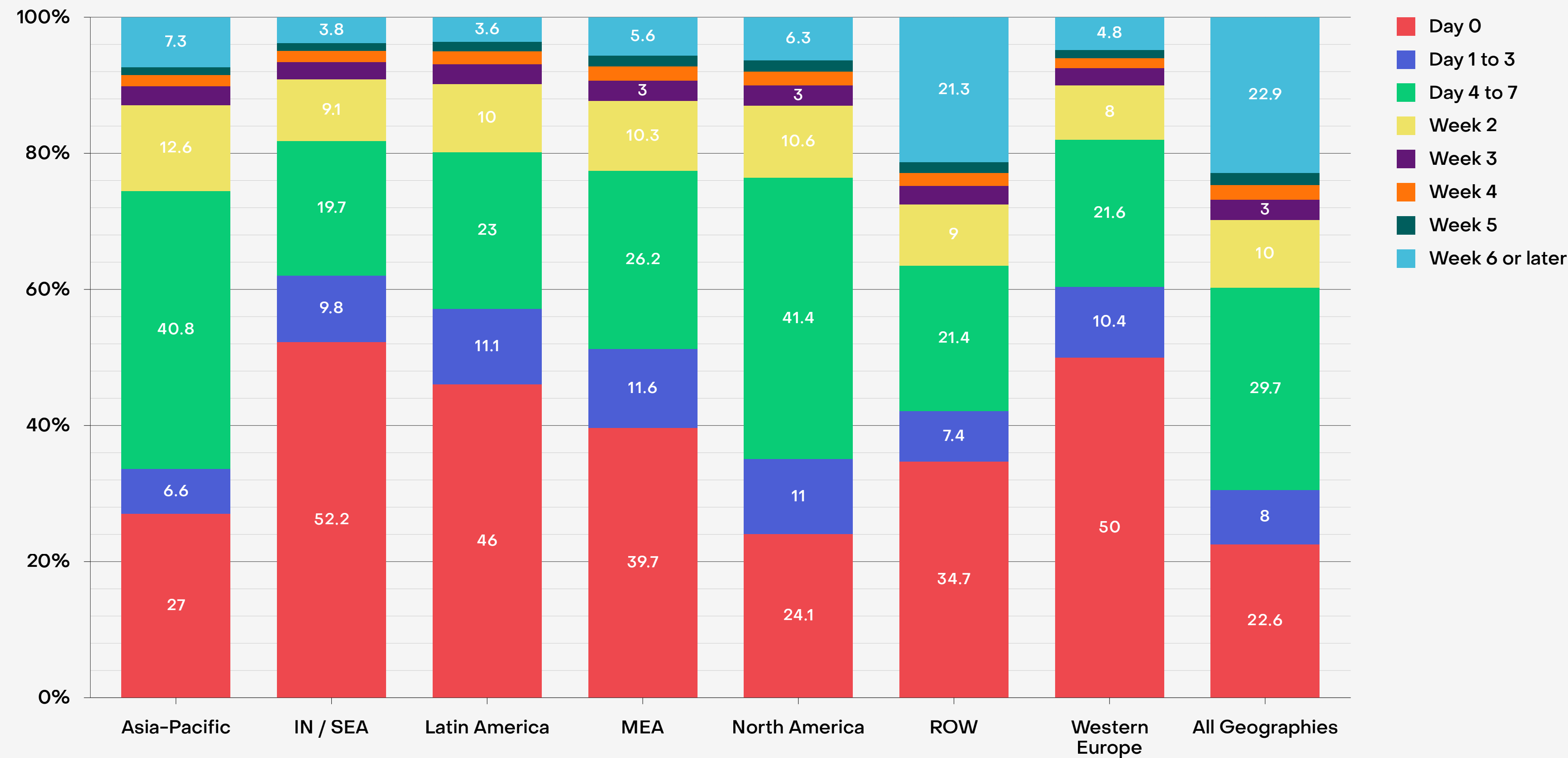
Day 35 Download to Paid Conversion Rate, By Geography

North America leads in converting downloads to paid users, with a median rate of 2.0%, suggesting strong demand for premium education content.



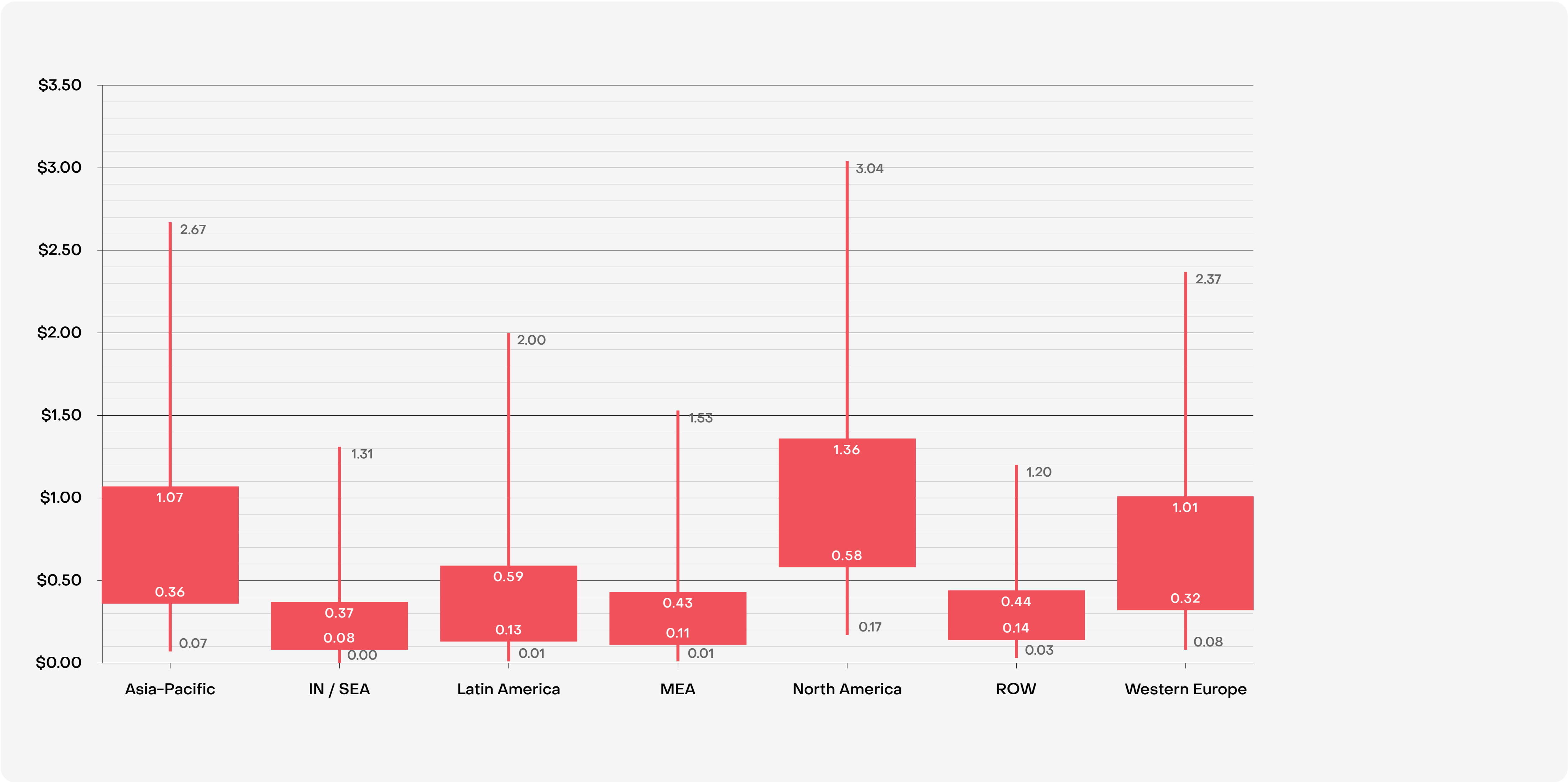
Time to Paid, By Geography

Asia-Pacific and North America see the highest share of conversions between Days 4–7, suggesting users take time to evaluate app value before committing to a paid plan.



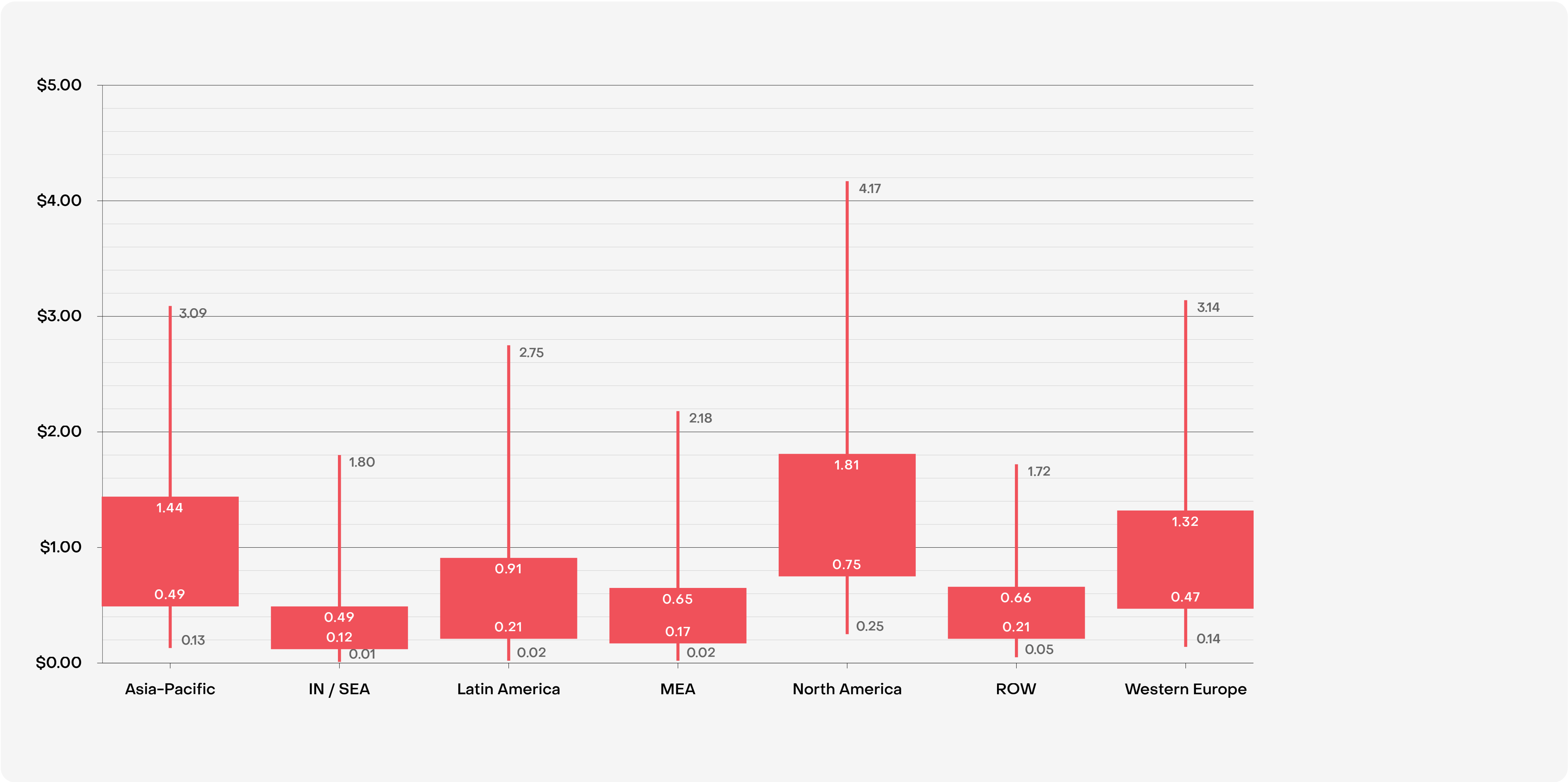
Day 14 Revenue per Install, By Geography

North America generates the highest early revenue per install, with a median of \$0.58 at Day 14, reflecting stronger monetization opportunities in developed markets.



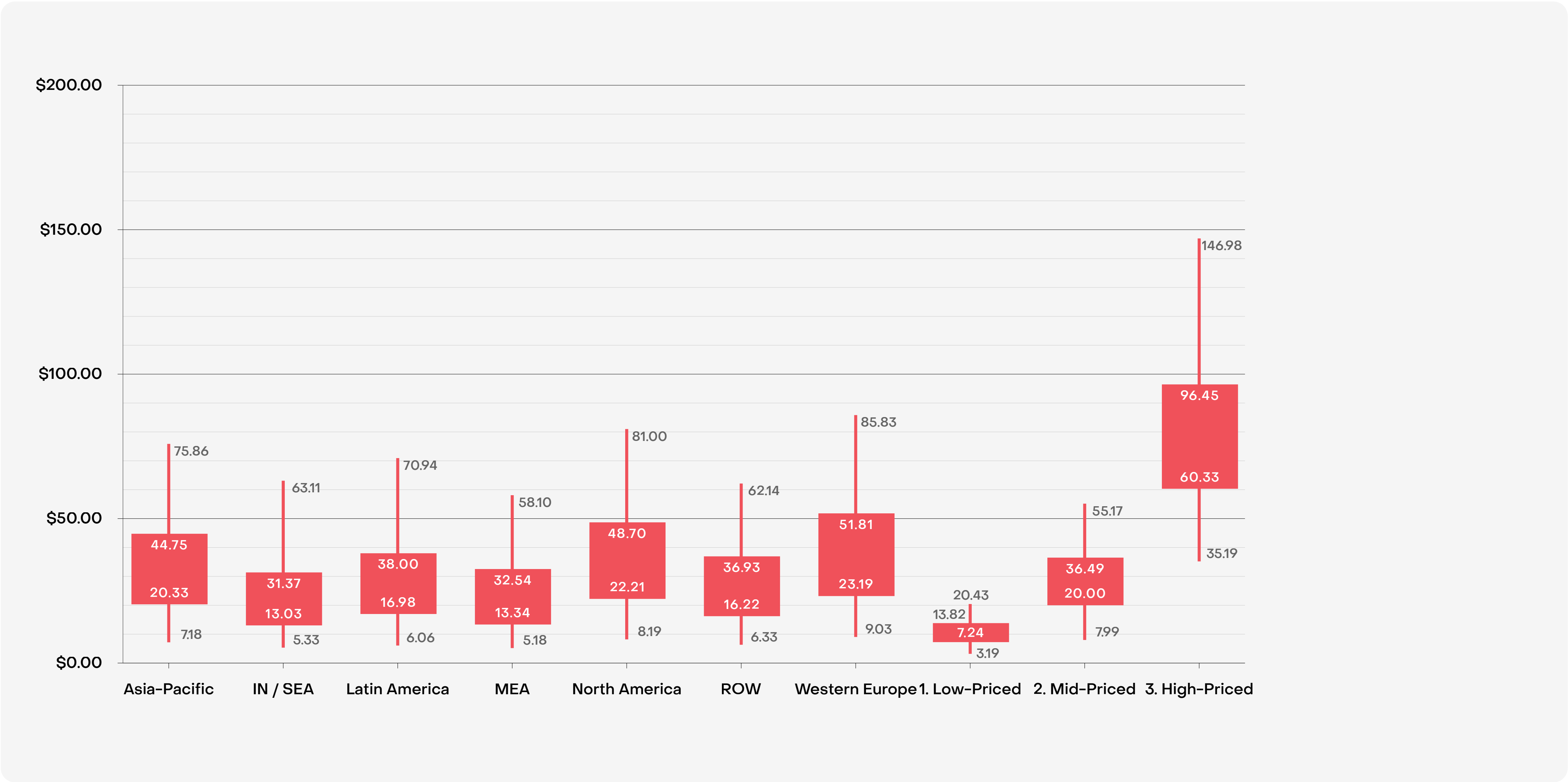
Day 60 Revenue per Install, By Geography

Latin America and MEA show lower long-term monetization, with median values of \$0.21 and \$0.17, suggesting a reliance on free content.



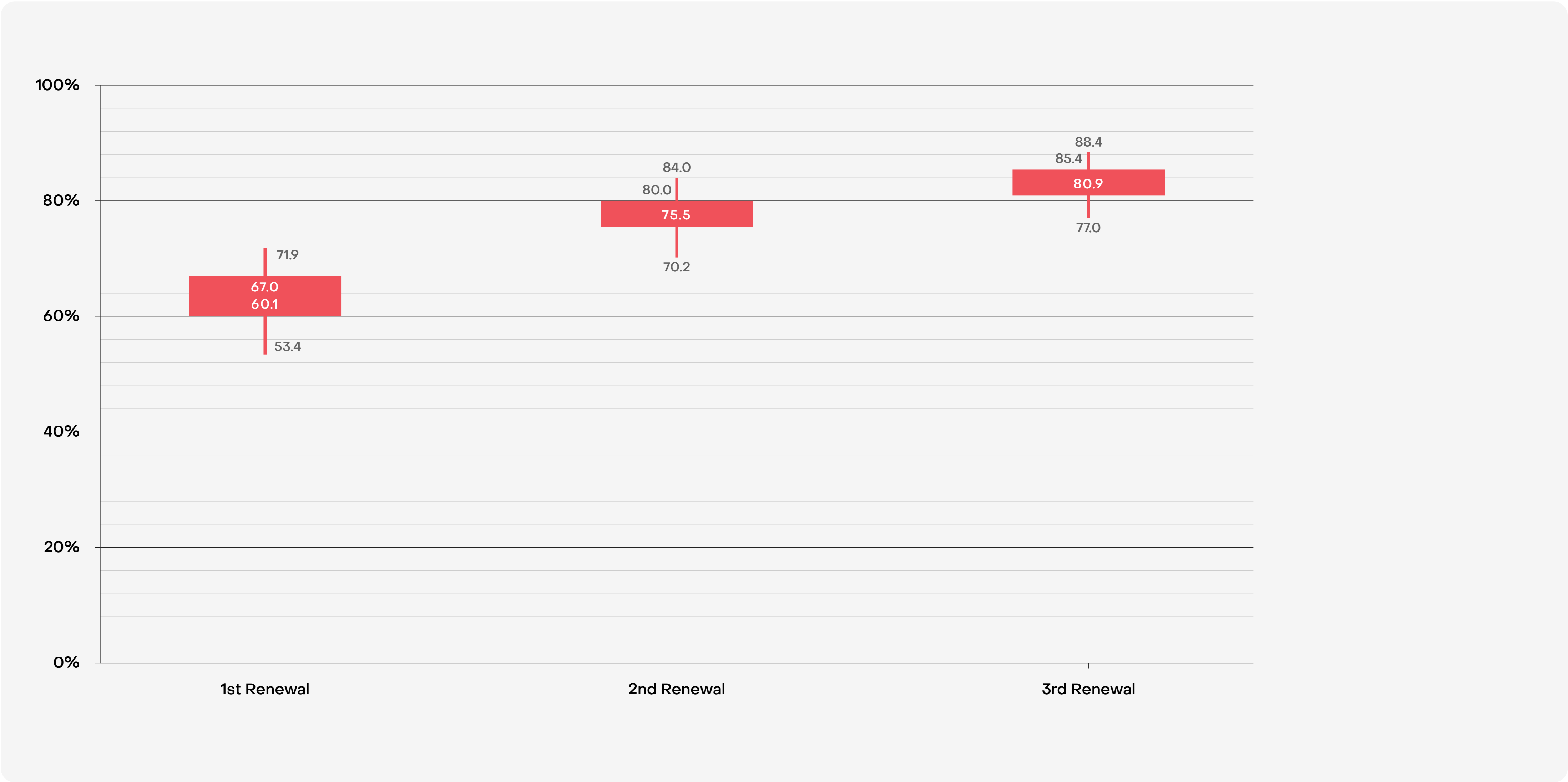
Year 1 Realized LTV per Payer, By Geography and Price Point

Western Europe and North America lead in long-term monetization, with median LTVs above \$22, reinforcing strong demand for paid education apps in developed markets.



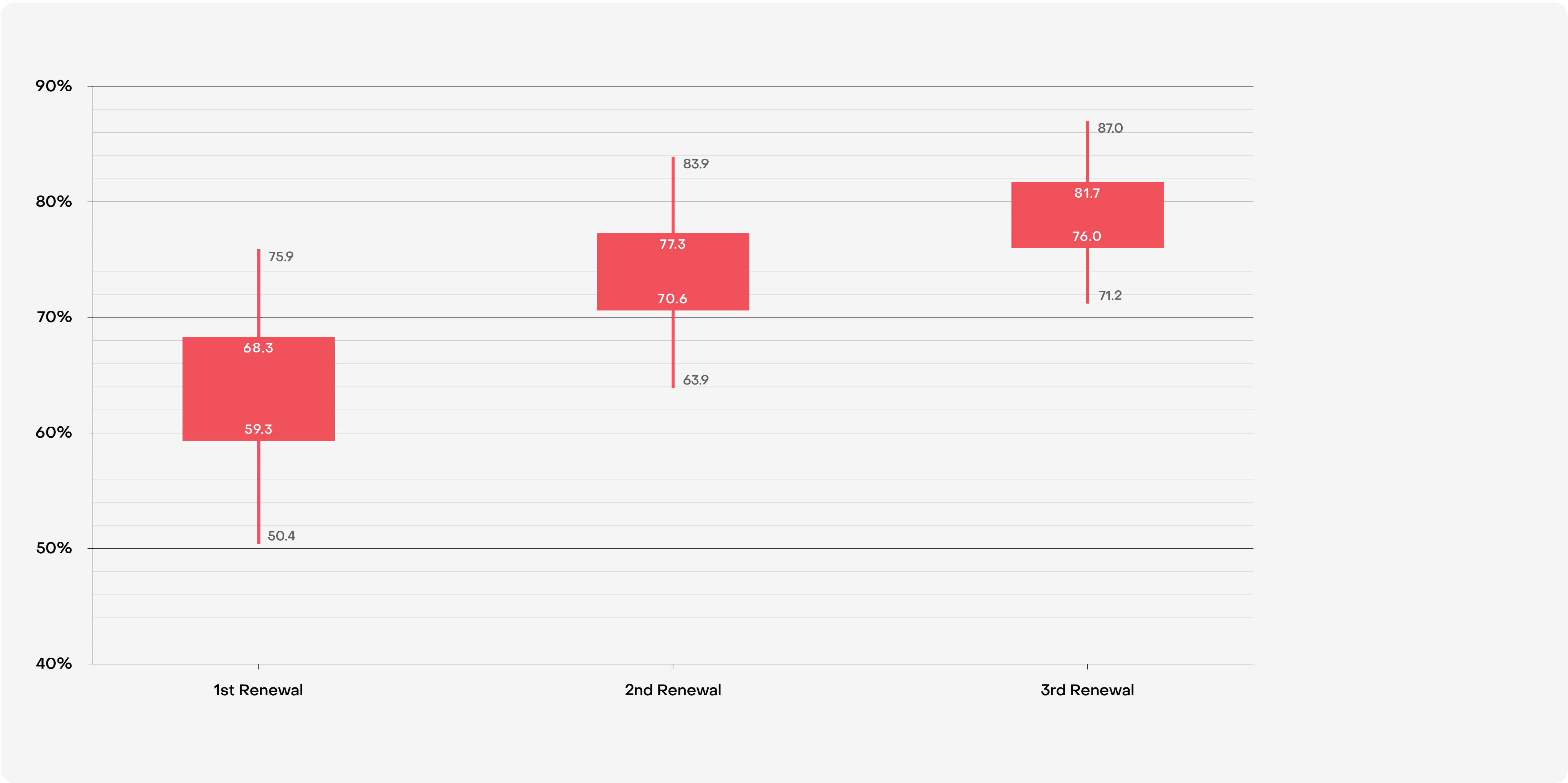
First 3 Weekly Renewals

Retention improves after the first renewal, jumping from 60.1% to 75.4% at the second renewal, suggesting initial churn is the biggest drop-off point.



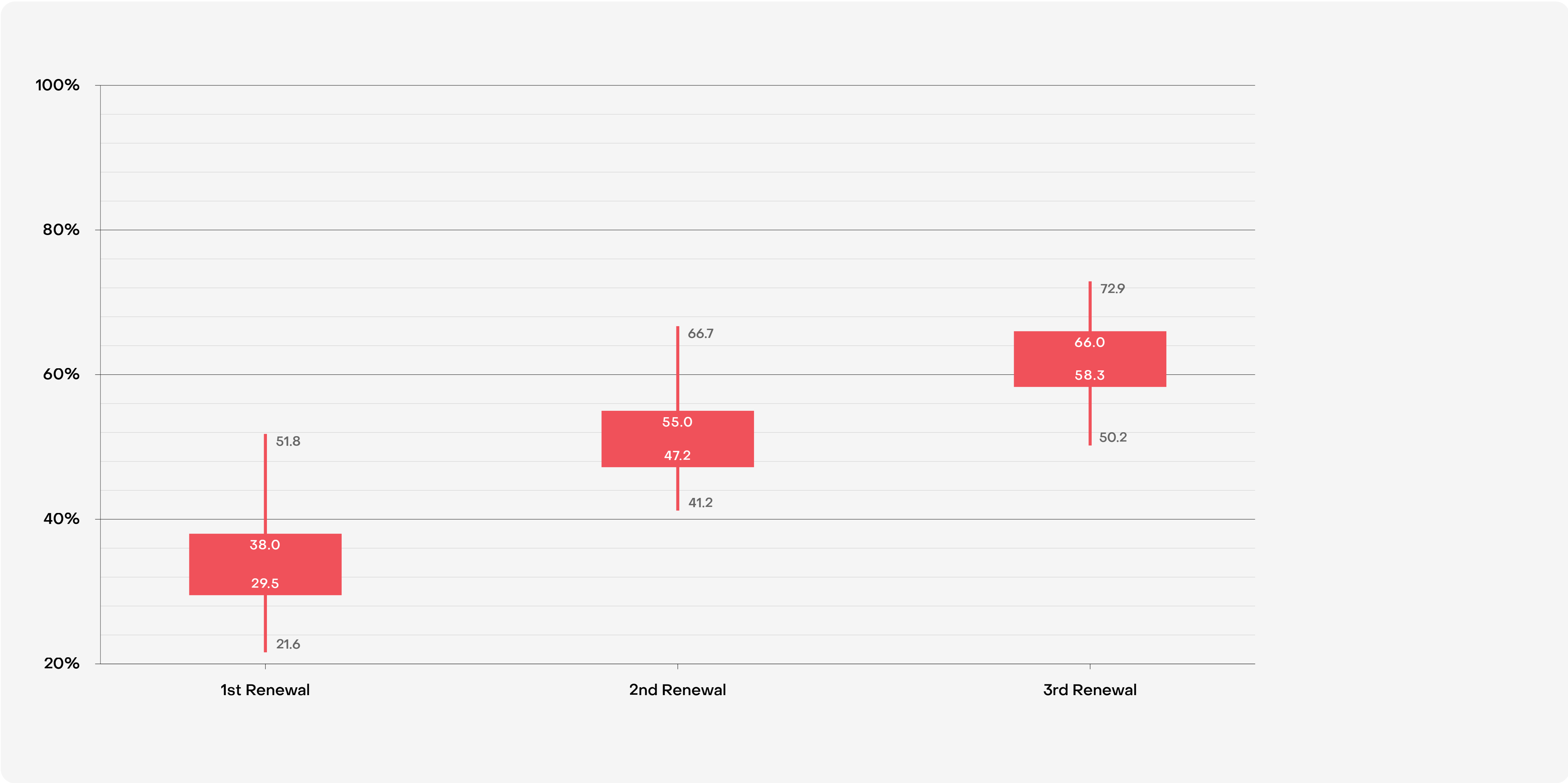
First 3 Monthly Renewals

Long-term retention remains high, with 76.0% of third-month renewals staying subscribed, reflecting sustained engagement in education apps.



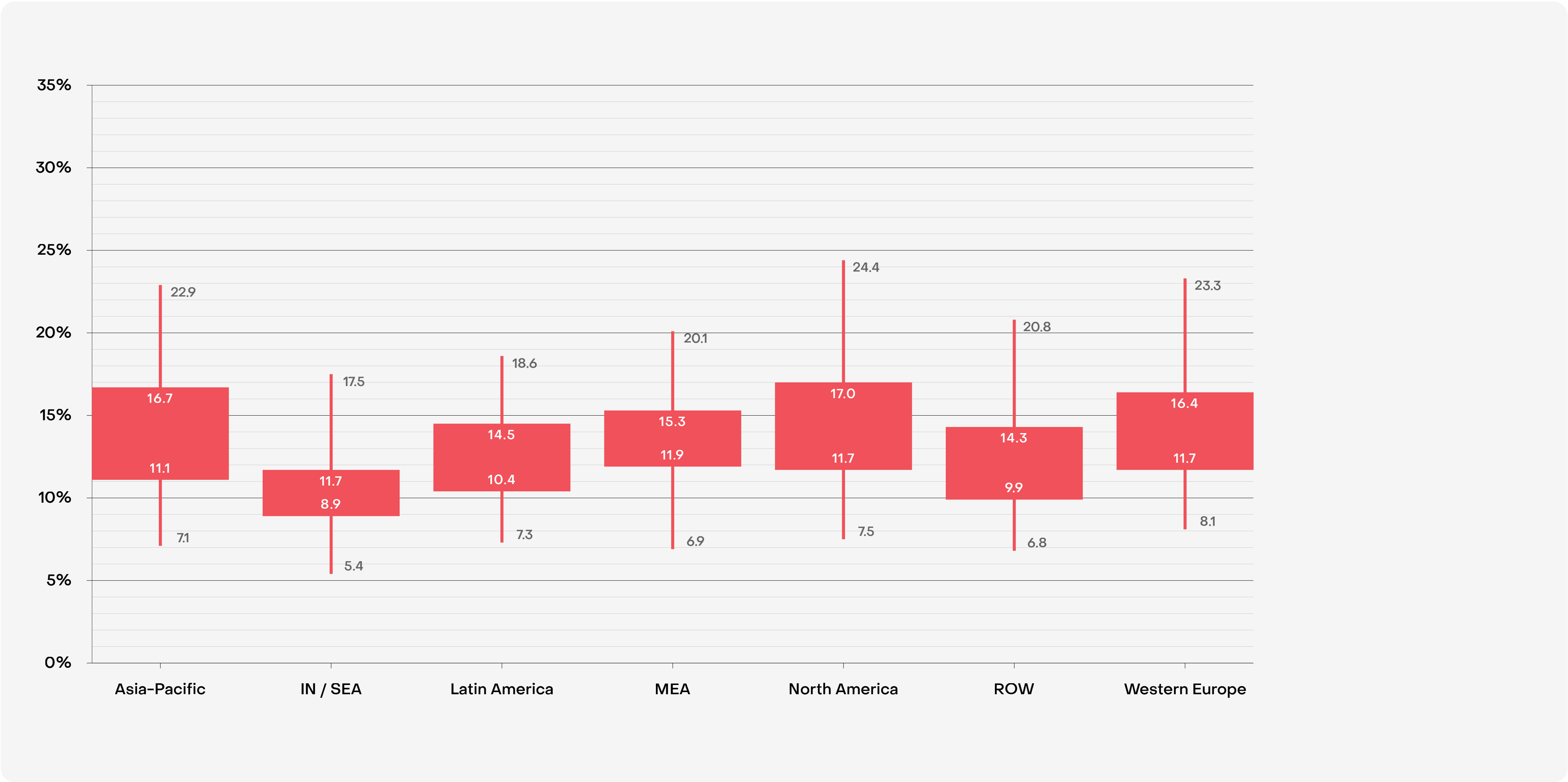
First 3 Annual Renewals

First-year renewal rates for annual plans are lower than shorter durations, with a median of 29.5%, suggesting that users carefully reconsider yearly commitments.



Year 1 Retained Monthly Subscribers, By Geography

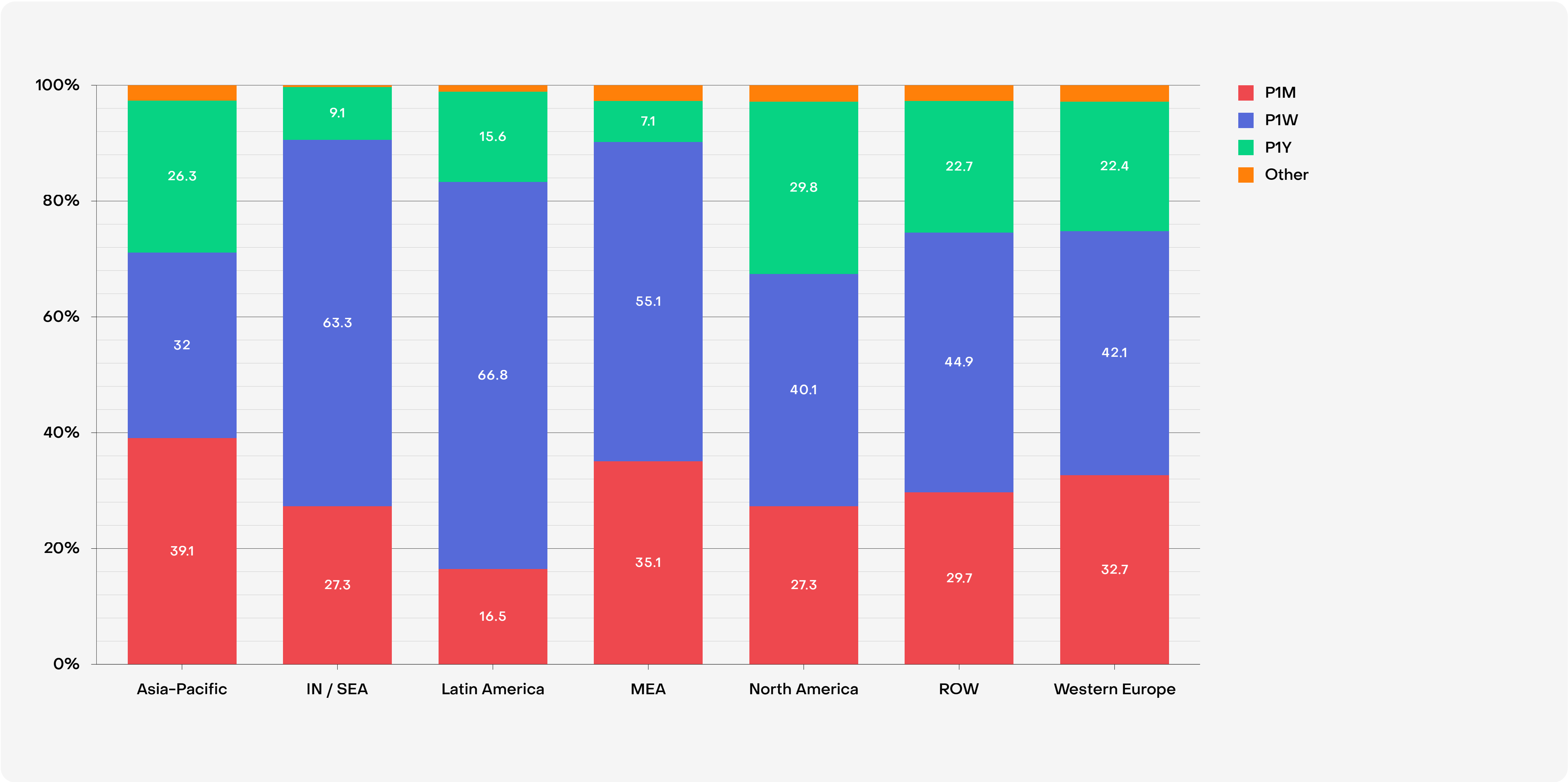
Western Europe and North America have the highest long-term retention, with medians of 11.7%, suggesting strong continued engagement with paid education content.



Social & Lifestyle

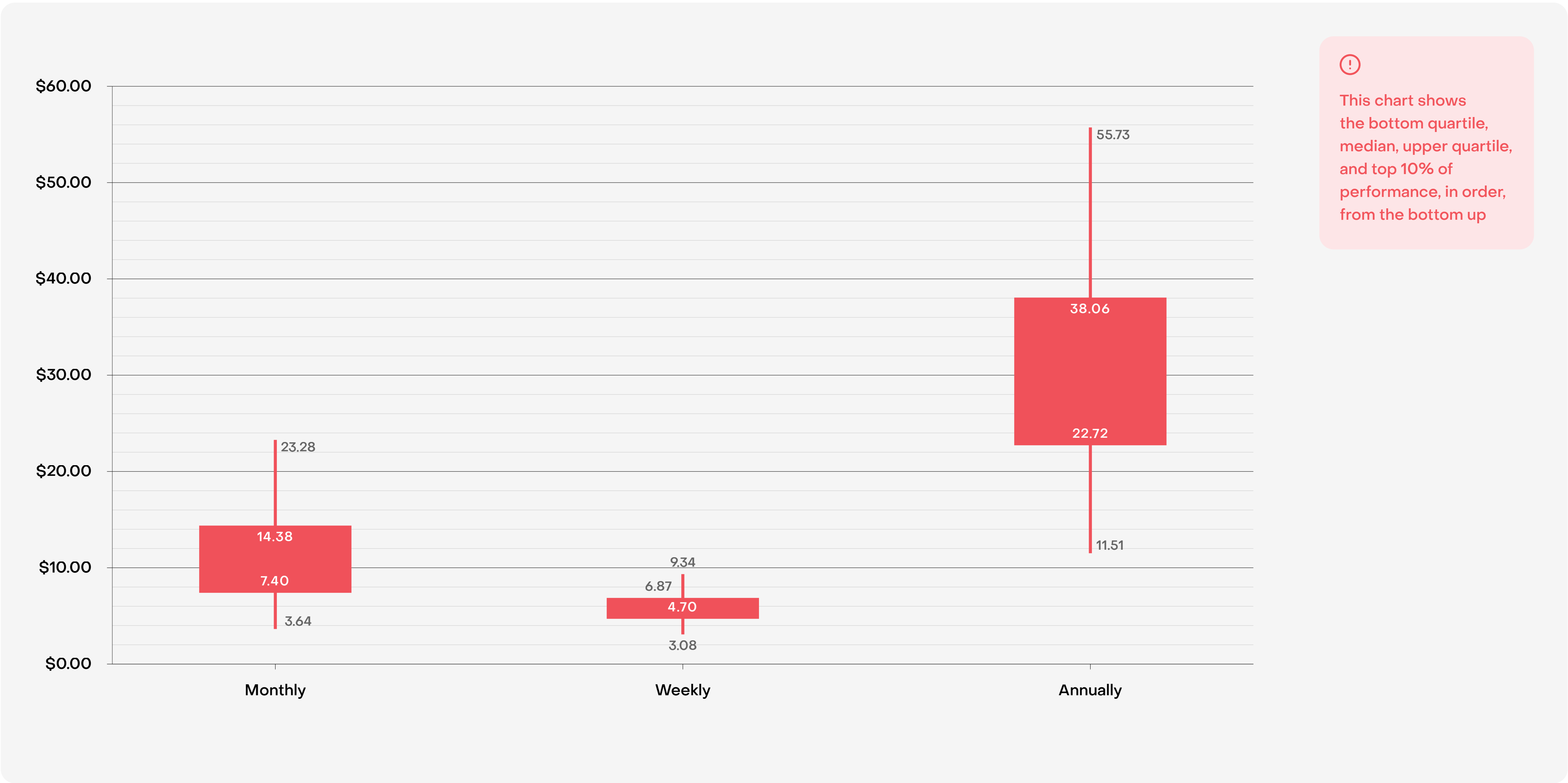
Share of Subscriptions Sold, By Geography

Weekly plans are the dominant choice in several regions, peaking at 66.8% in Latin America, reflecting user preference for short-term access to social and dating apps.



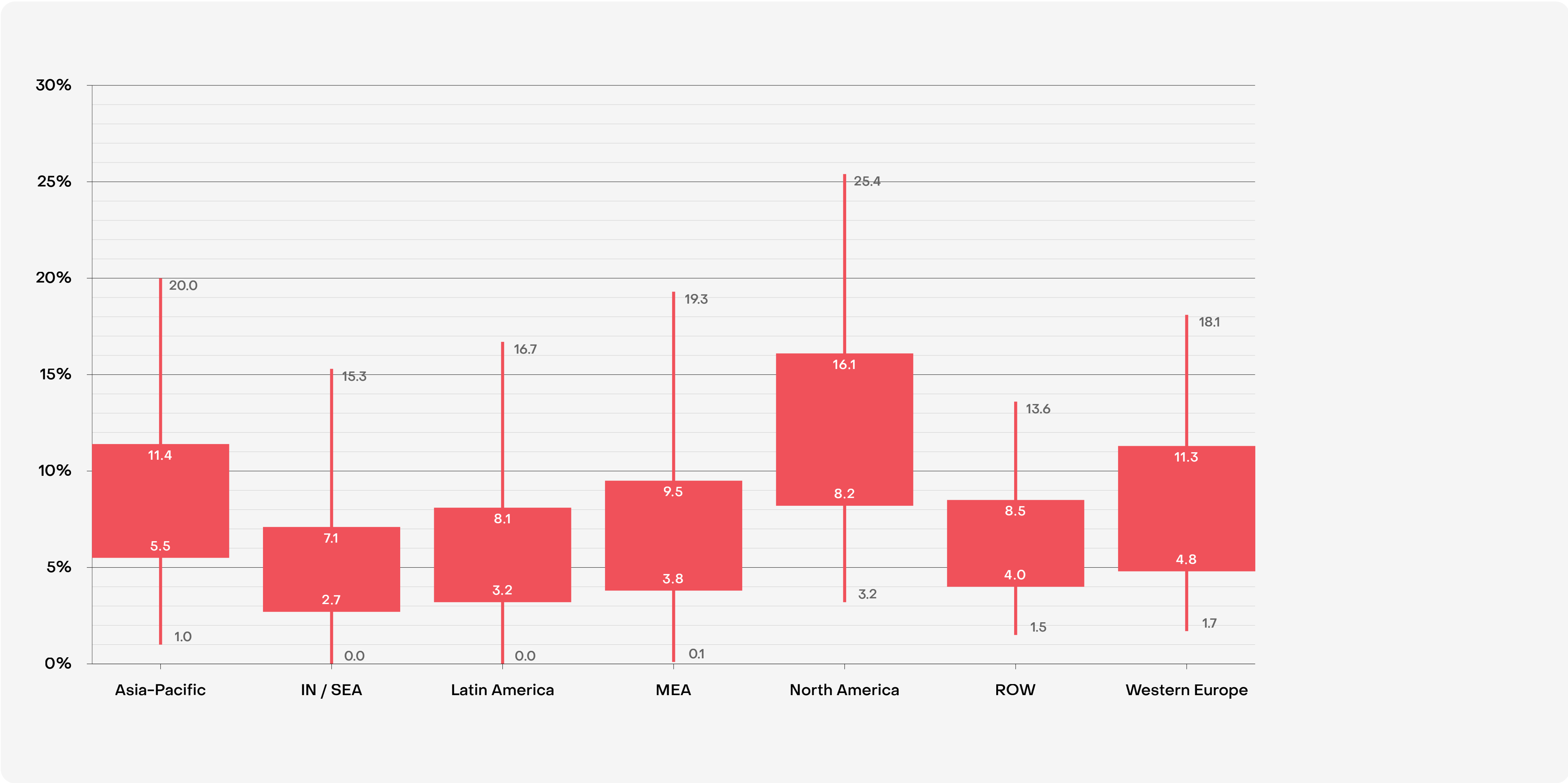
Price Points per Plan Duration

Weekly plans remain expensive relative to their duration, with a median of \$4.70, making them a costly option for frequent users compared to monthly or yearly commitments.



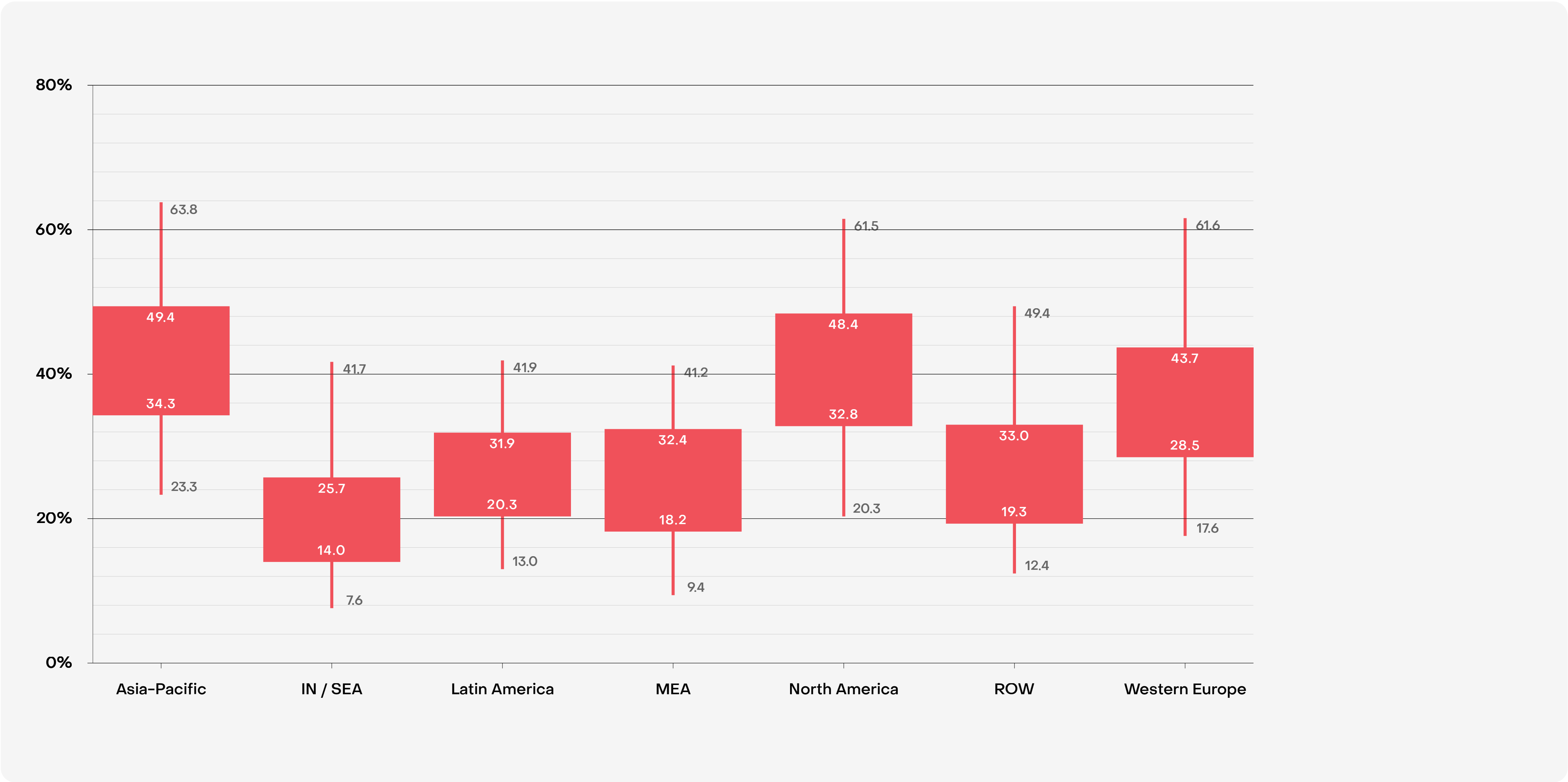
Trial Start Rate, By Geography

The low trial adoption in many regions suggests that social and lifestyle apps may rely more on direct subscriptions or in-app purchases rather than free trials.



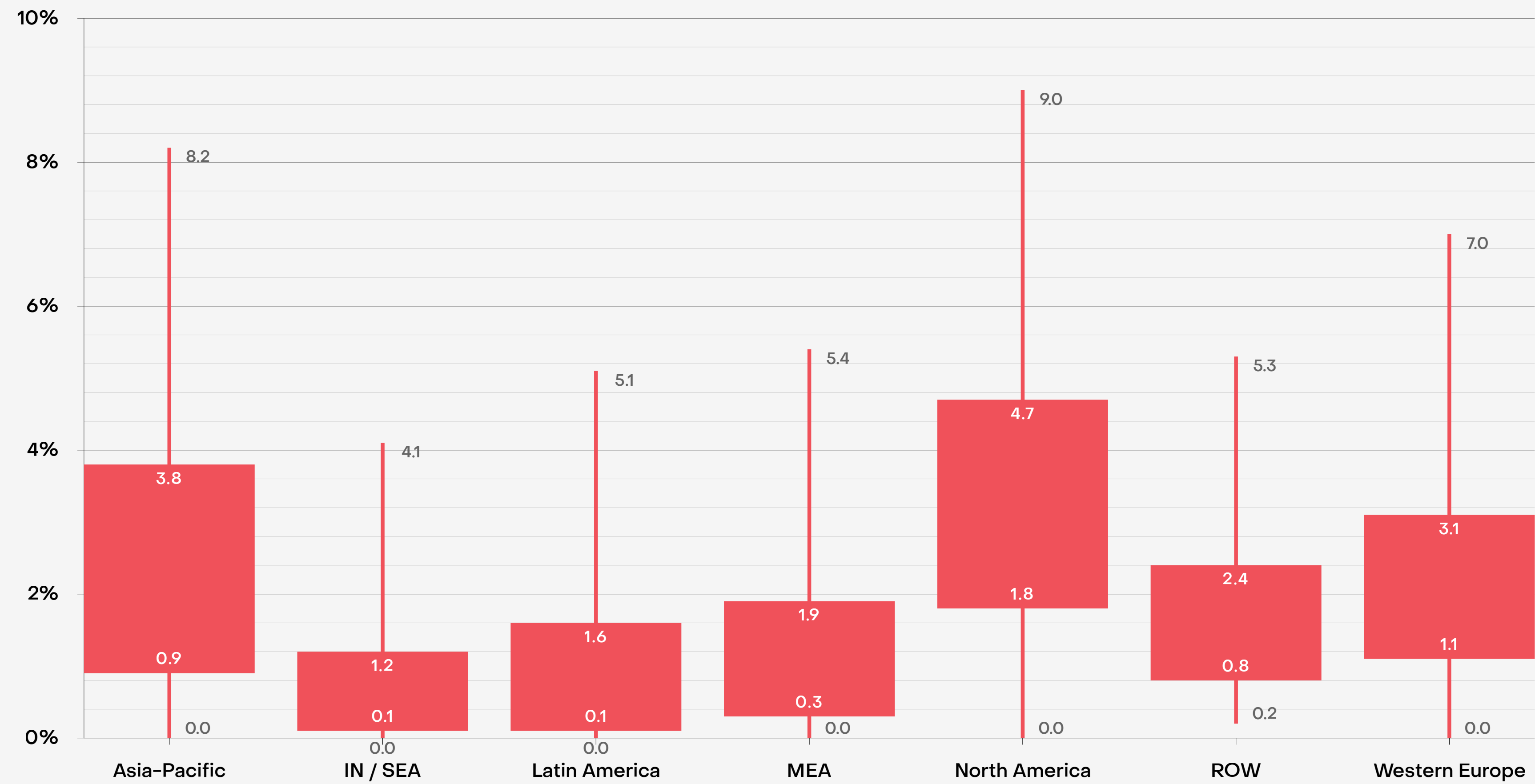
Trial to Paid Conversion Rate, By Geography

Western Europe and North America see the highest trial-to-paid conversion rates, both exceeding 28% at the median, indicating that users find value in premium features.



Day 35 Download to Paid Conversion Rate, By Geography

India/Southeast Asia and Latin America struggle with conversion, both showing median rates below 0.2%, suggesting that most users engage with free content rather than upgrading.



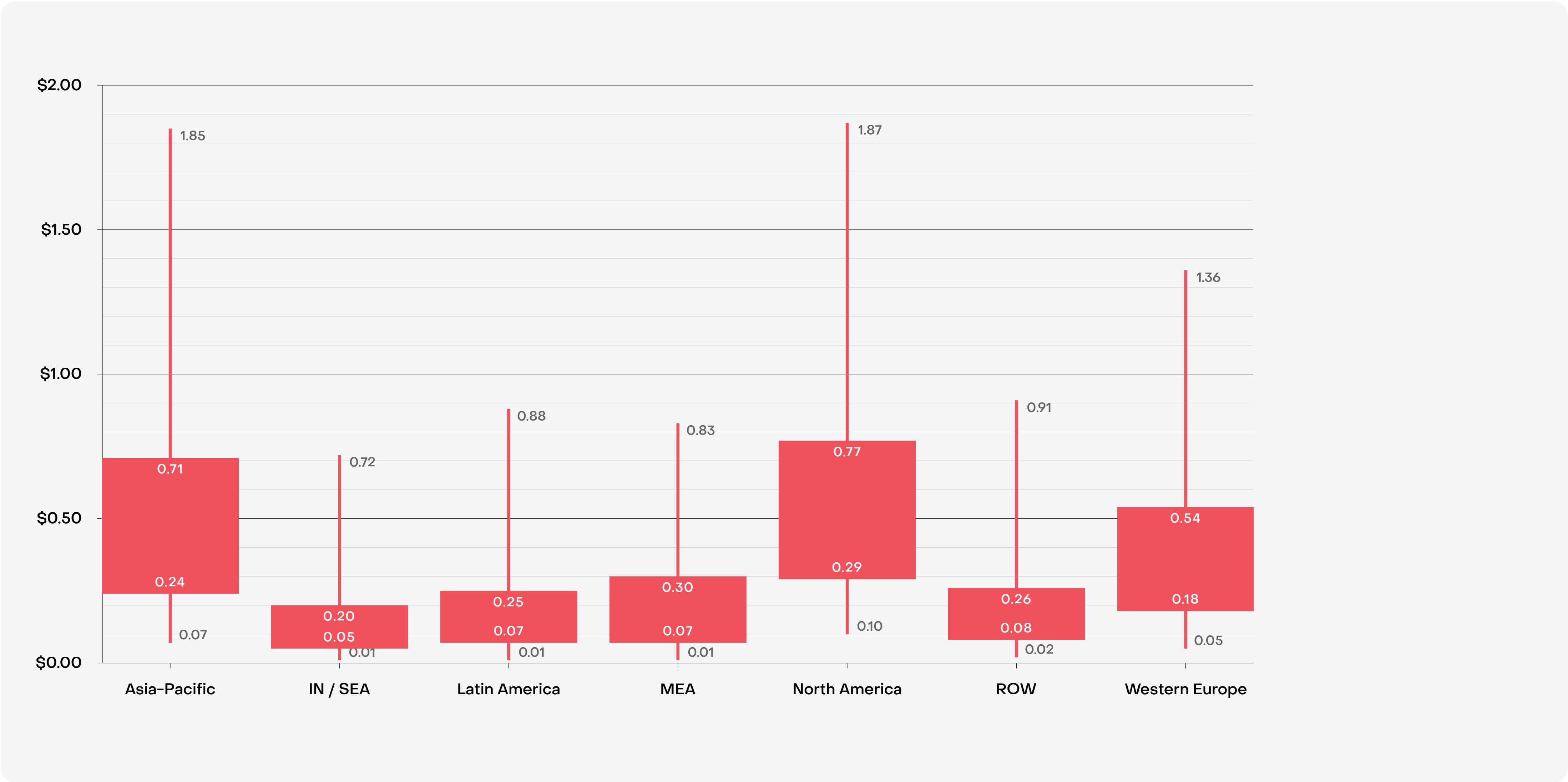
Time to Paid, By Geography

ROW has a notably extended purchase timeline, with 34.0% of conversions occurring after Week 6, suggesting users take longer to evaluate paid features.



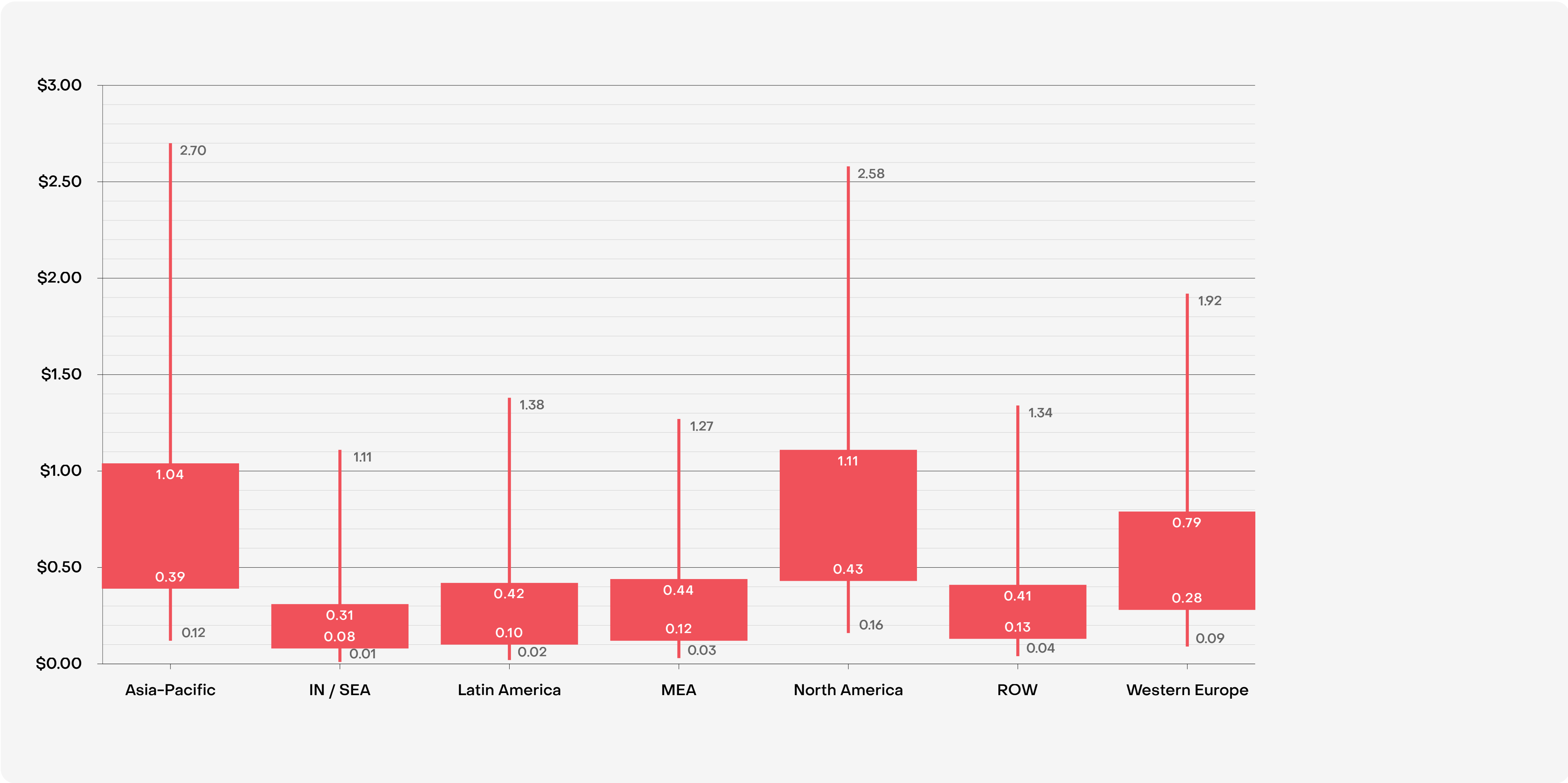
Day 14 Revenue per Install, By Geography

North America generates the highest early revenue per install, with a median of \$0.29 at Day 14, reflecting strong user monetization.



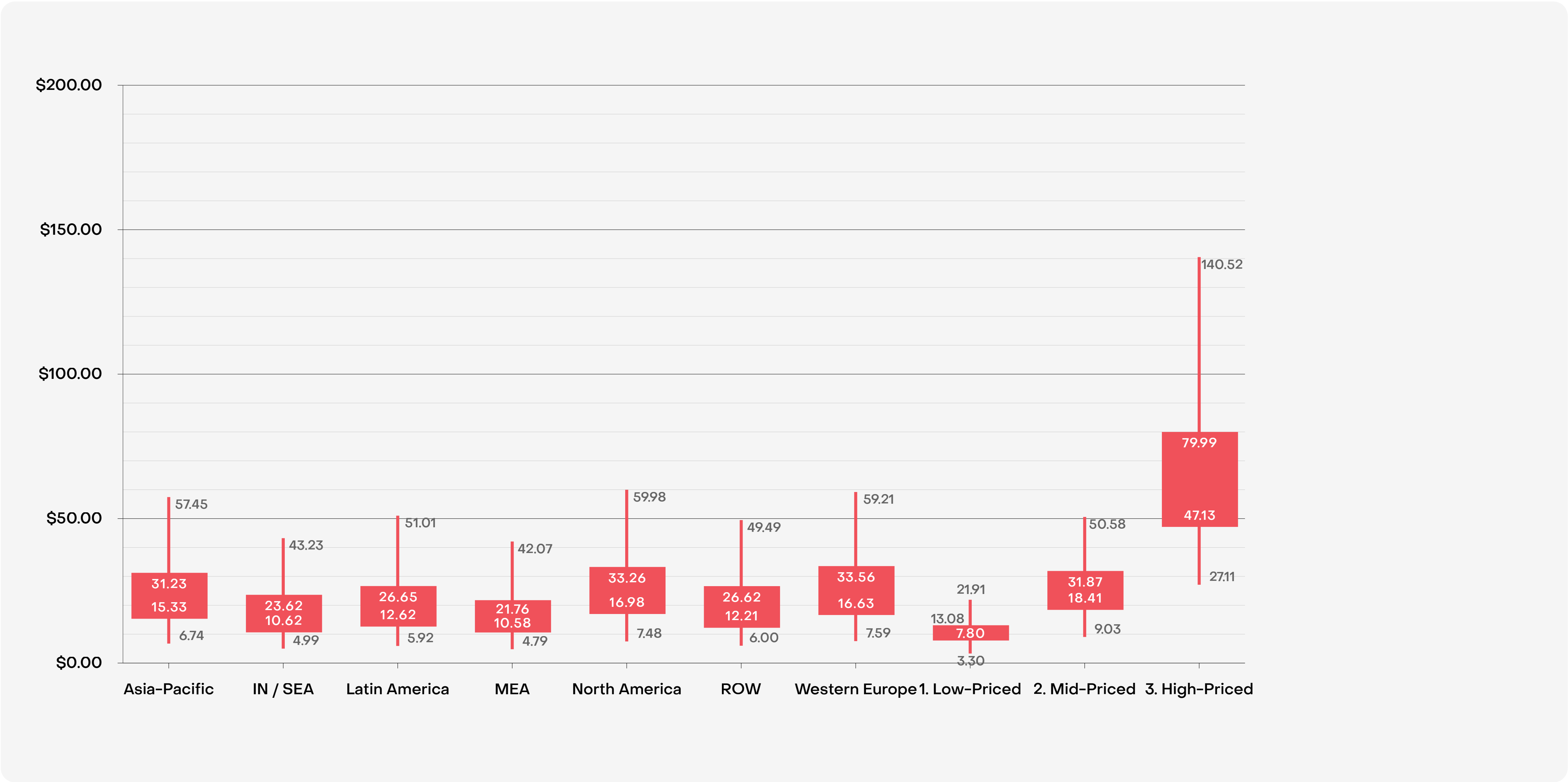
Day 60 Revenue per Install, By Geography

Revenue per install increases over time, with North America reaching a median of \$0.43 by Day 60, highlighting the impact of retention and continued purchases.



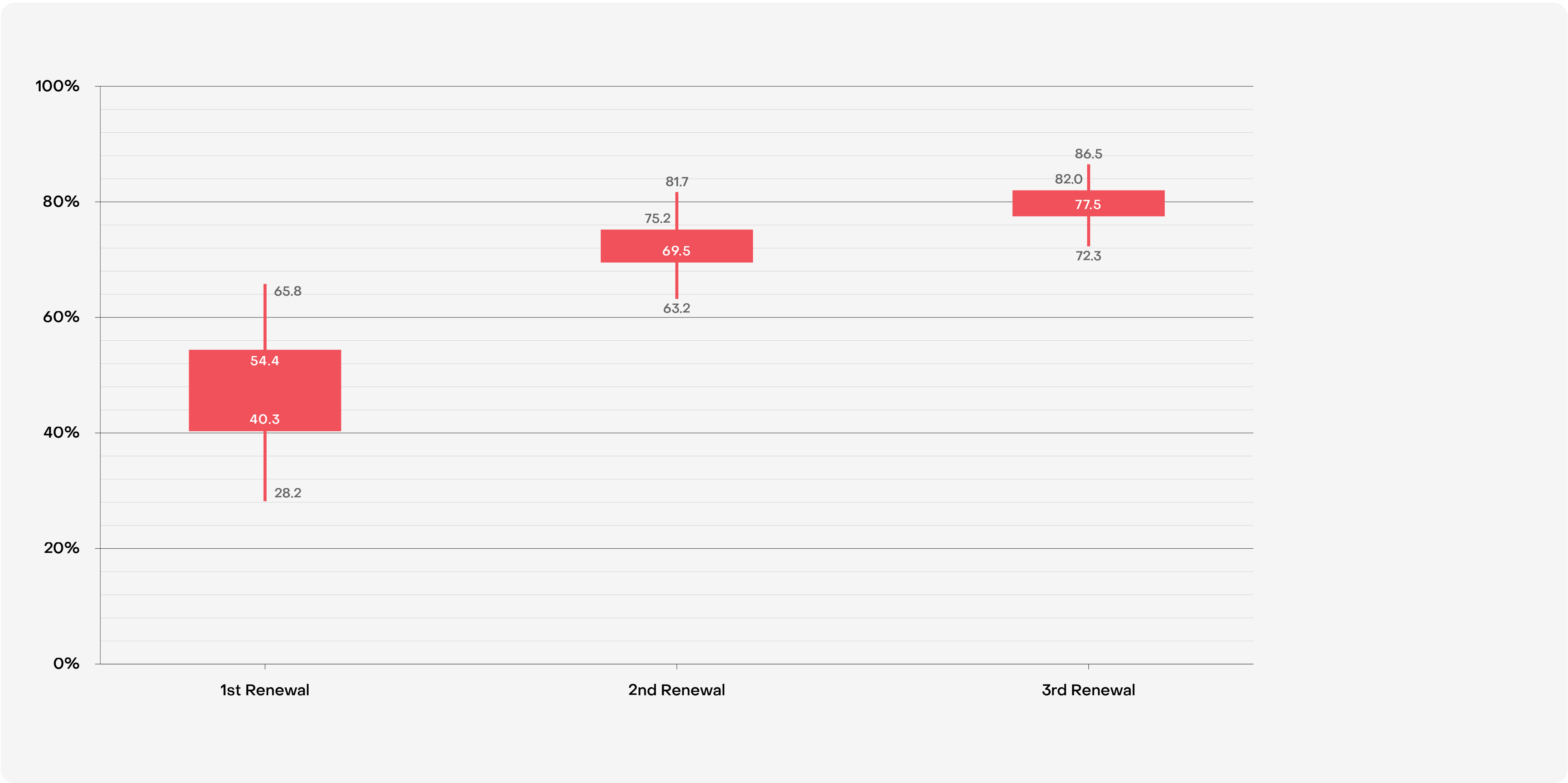
Year 1 Realized LTV per Payer, By Geography and Price Point

North America and Western Europe lead in payer LTV, both exceeding \$16 at the median, reflecting strong willingness to pay for premium features.



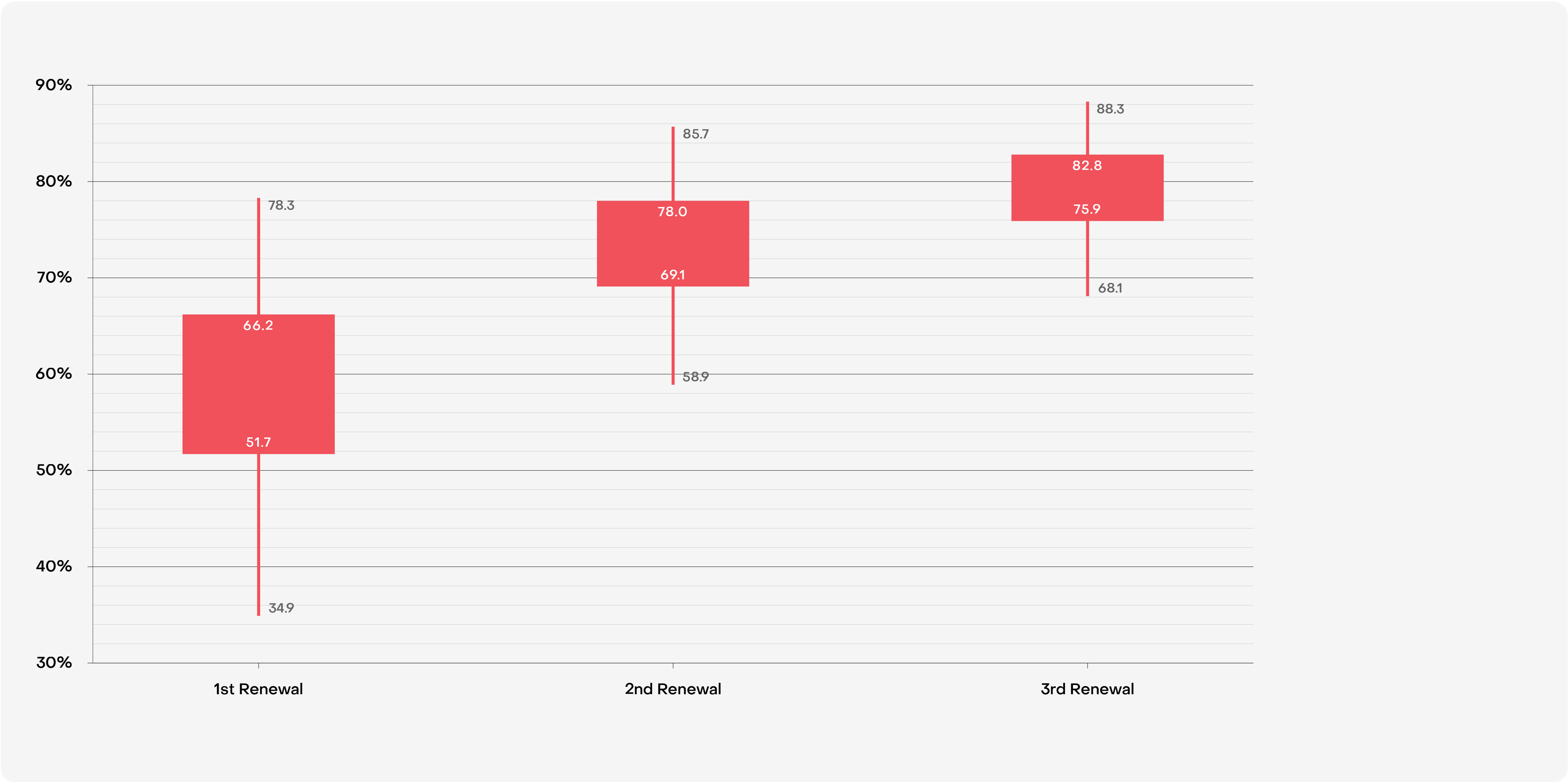
First 3 Weekly Renewals

Retention rates improve after the first renewal, rising from 40.3% to 69.5% at the second renewal, showing stronger commitment among returning users.



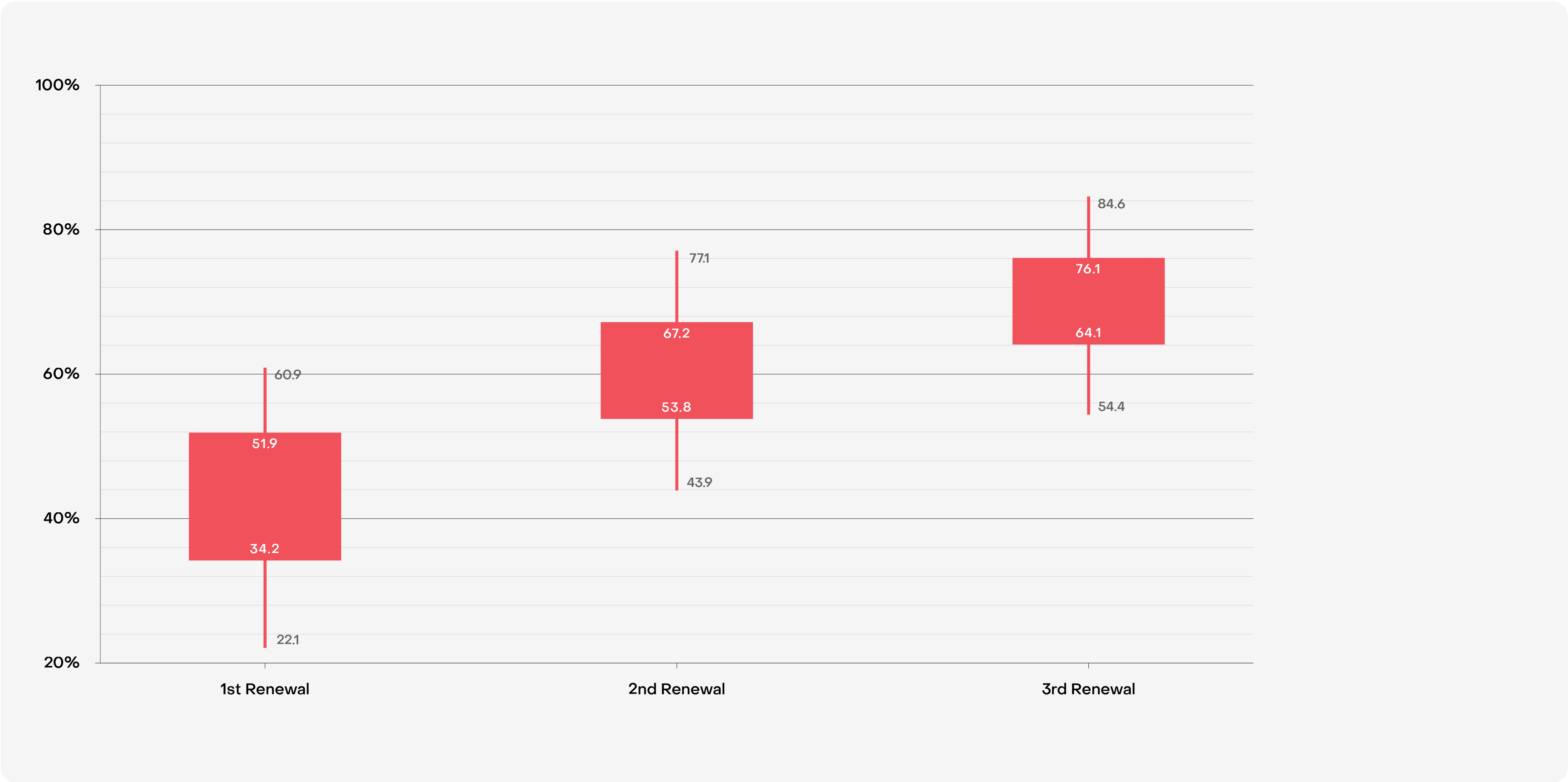
First 3 Monthly Renewals

Long-term engagement is strong, with 75.9% of third-month renewals staying subscribed, indicating continued interest in premium features.



First 3 Annual Renewals

By the third renewal, retention improves to 64.1%, demonstrating strong loyalty among long-term users who continue subscribing.



Year 1 Retained Monthly Subscribers, By Geography

India/Southeast Asia and MEA have the lowest year-one retention, both below 9%, indicating potential challenges in sustaining paid subscribers in these markets.

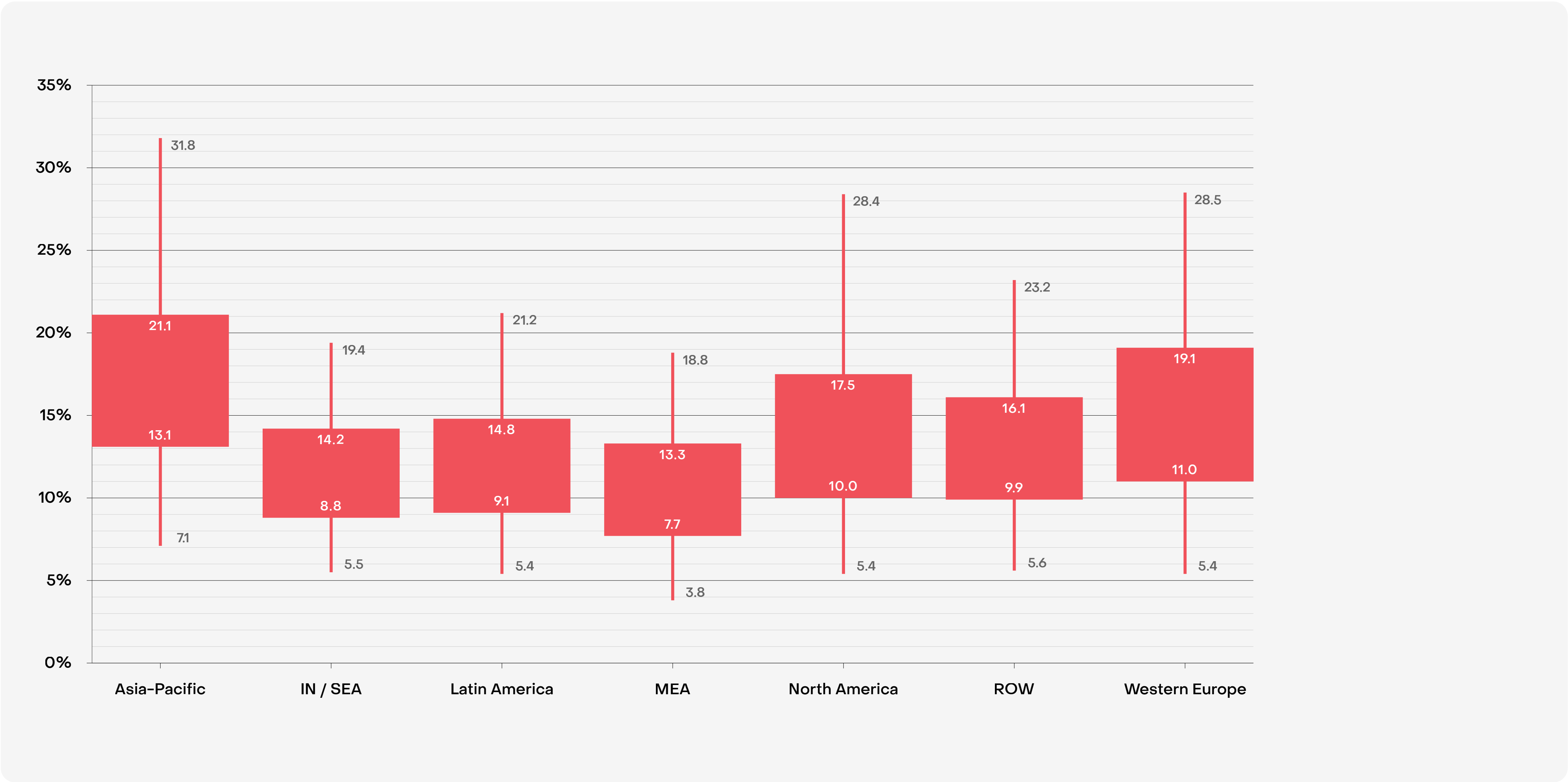
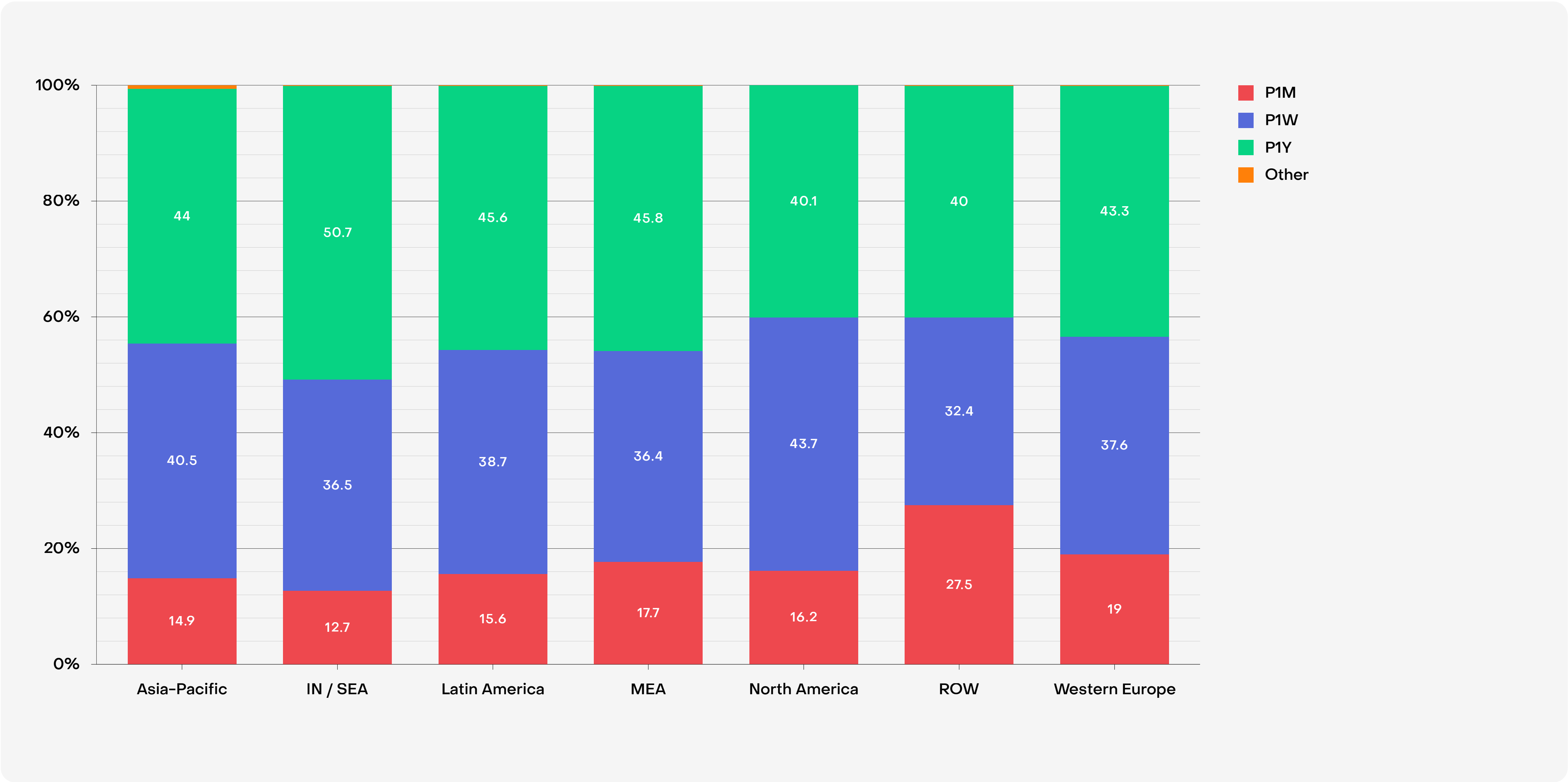


Photo & Video

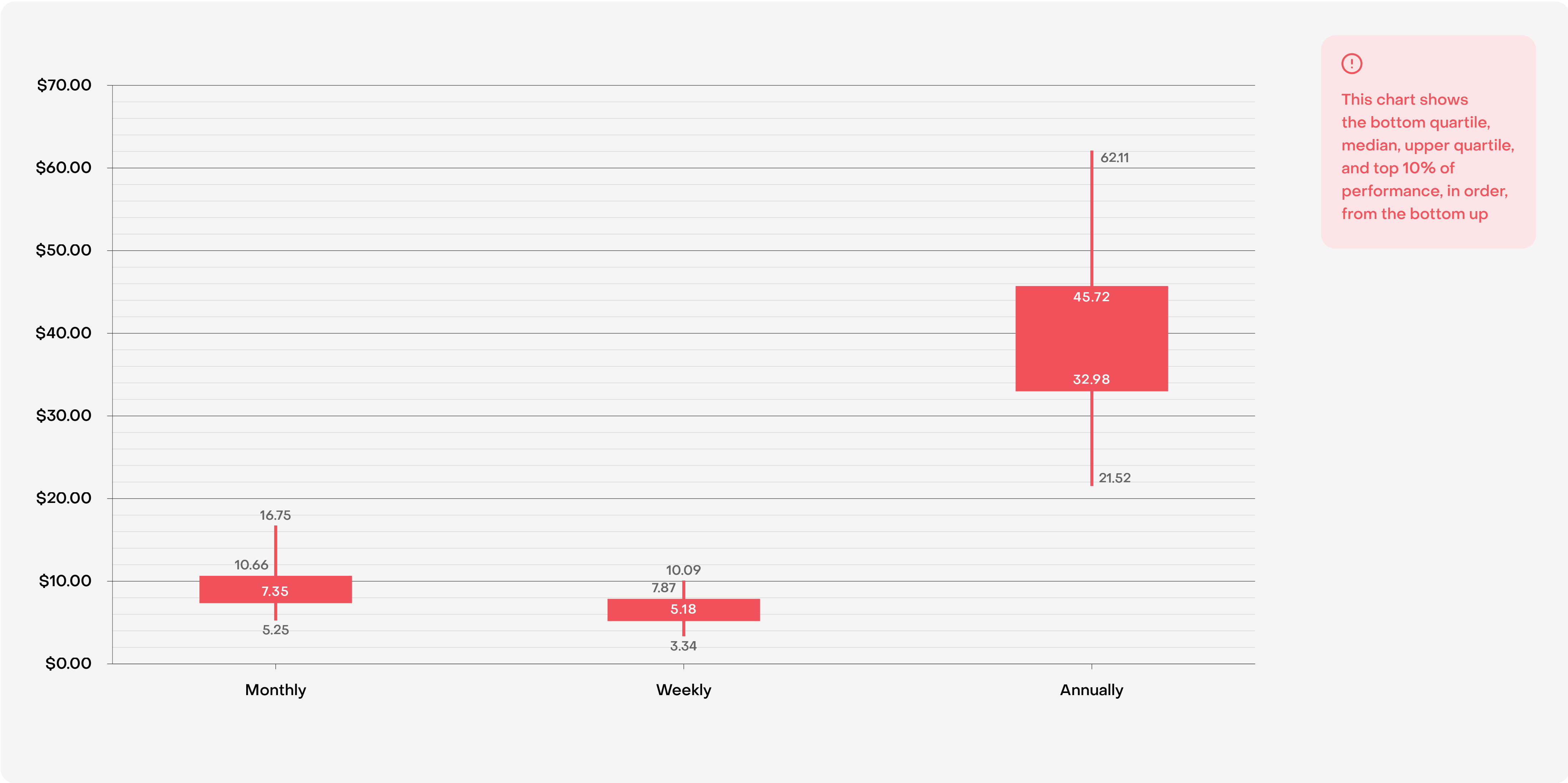
Share of Subscriptions Sold, By Geography

Weekly plans remain widely adopted, particularly in Asia-Pacific (40.5%) and Latin America (38.7%), reflecting short-term demand for AI-powered editing tools and effects.



Price Points per Plan Duration

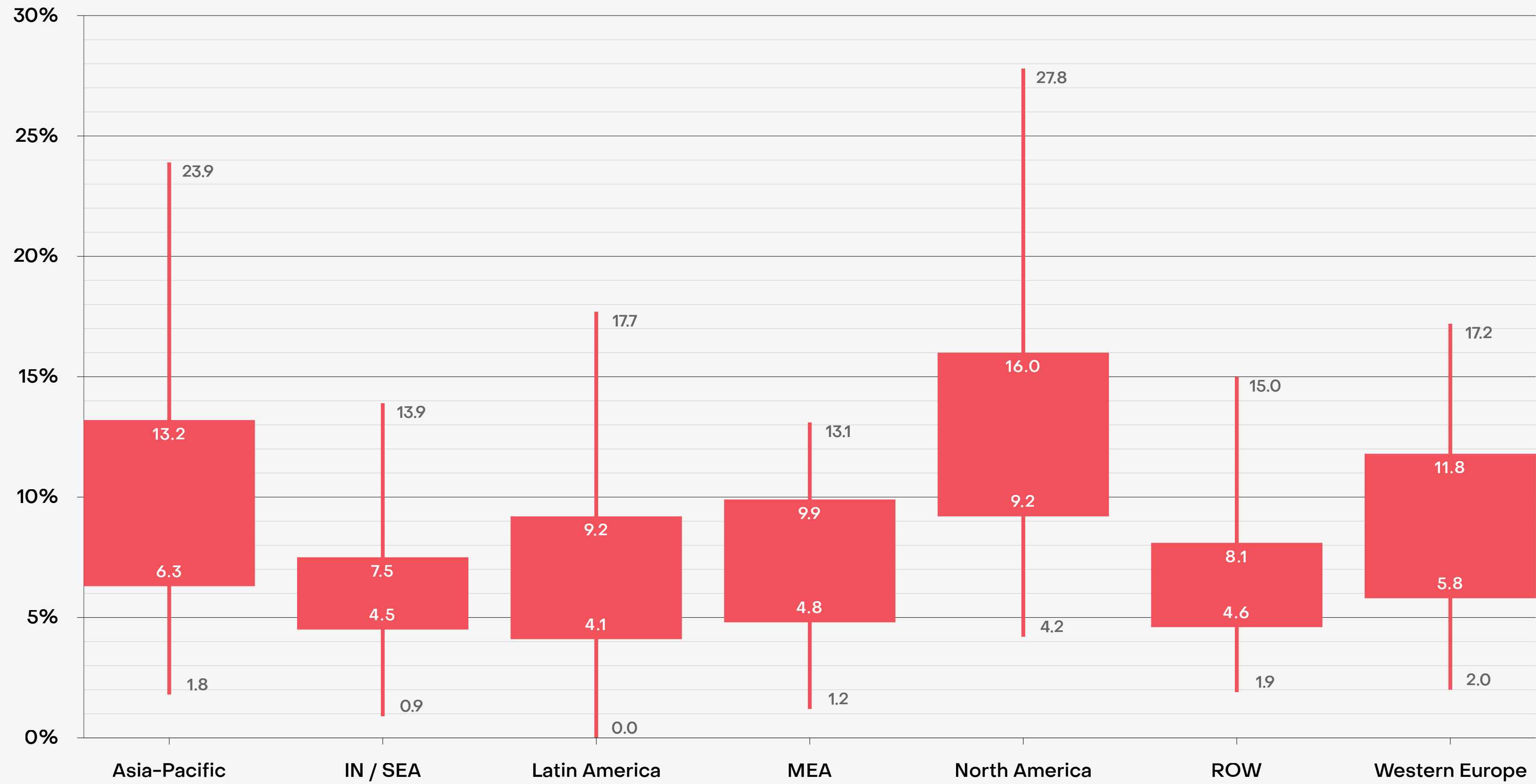
Weekly plans are priced at a premium relative to their duration, with a median of \$5.18, making them an expensive option for frequent users compared to monthly or annual options.



⚠️ This chart shows the bottom quartile, median, upper quartile, and top 10% of performance, in order, from the bottom up

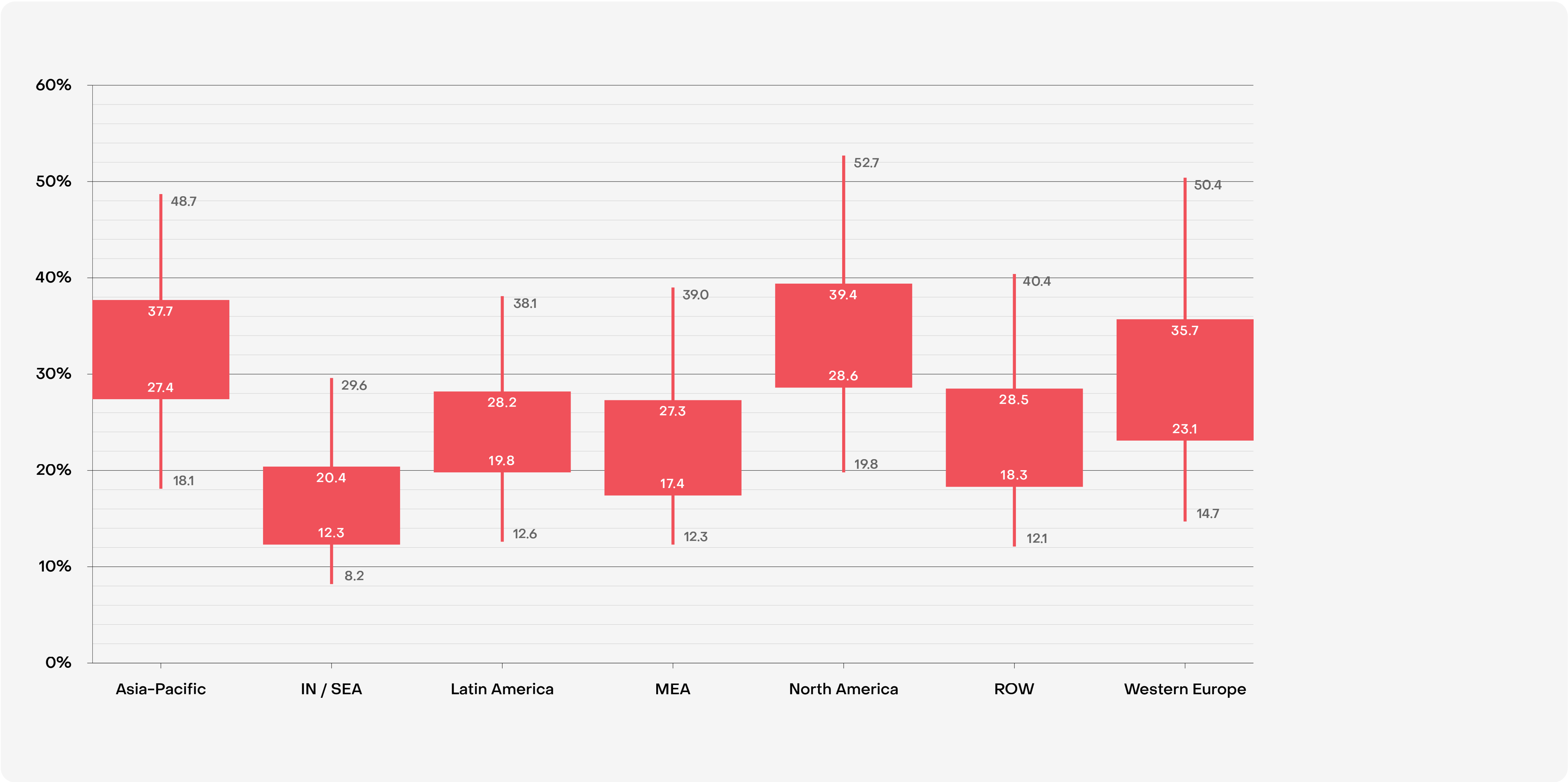
Trial Start Rate, By Geography

North America leads in trial adoption, with a median start rate of 9.2%, suggesting that users are more open to testing premium photo and video tools before committing.



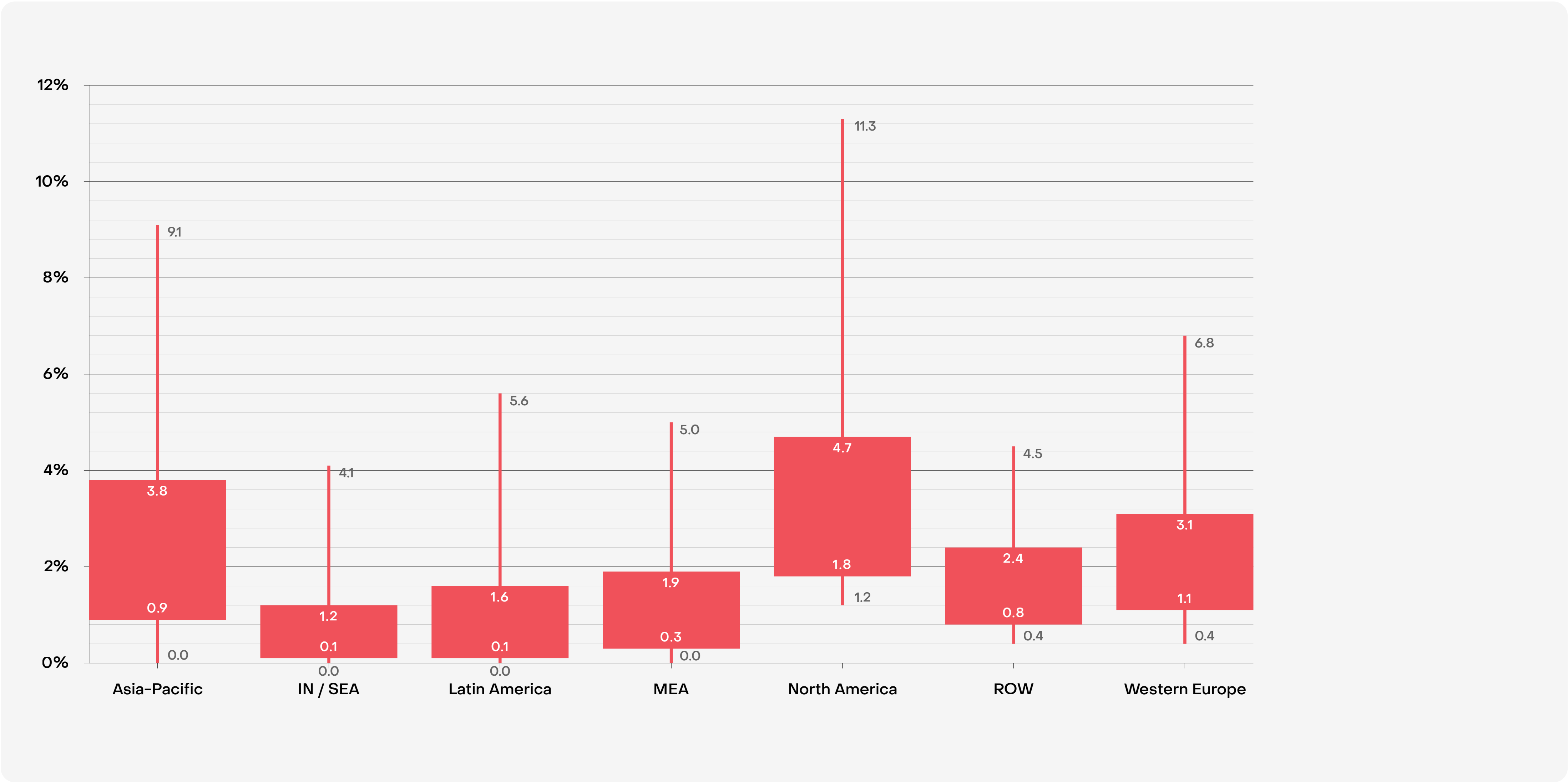
Trial to Paid Conversion Rate, By Geography

India/Southeast Asia struggles with conversion, with a median rate of just 12.3%, indicating potential pricing concerns or competition from free alternatives.



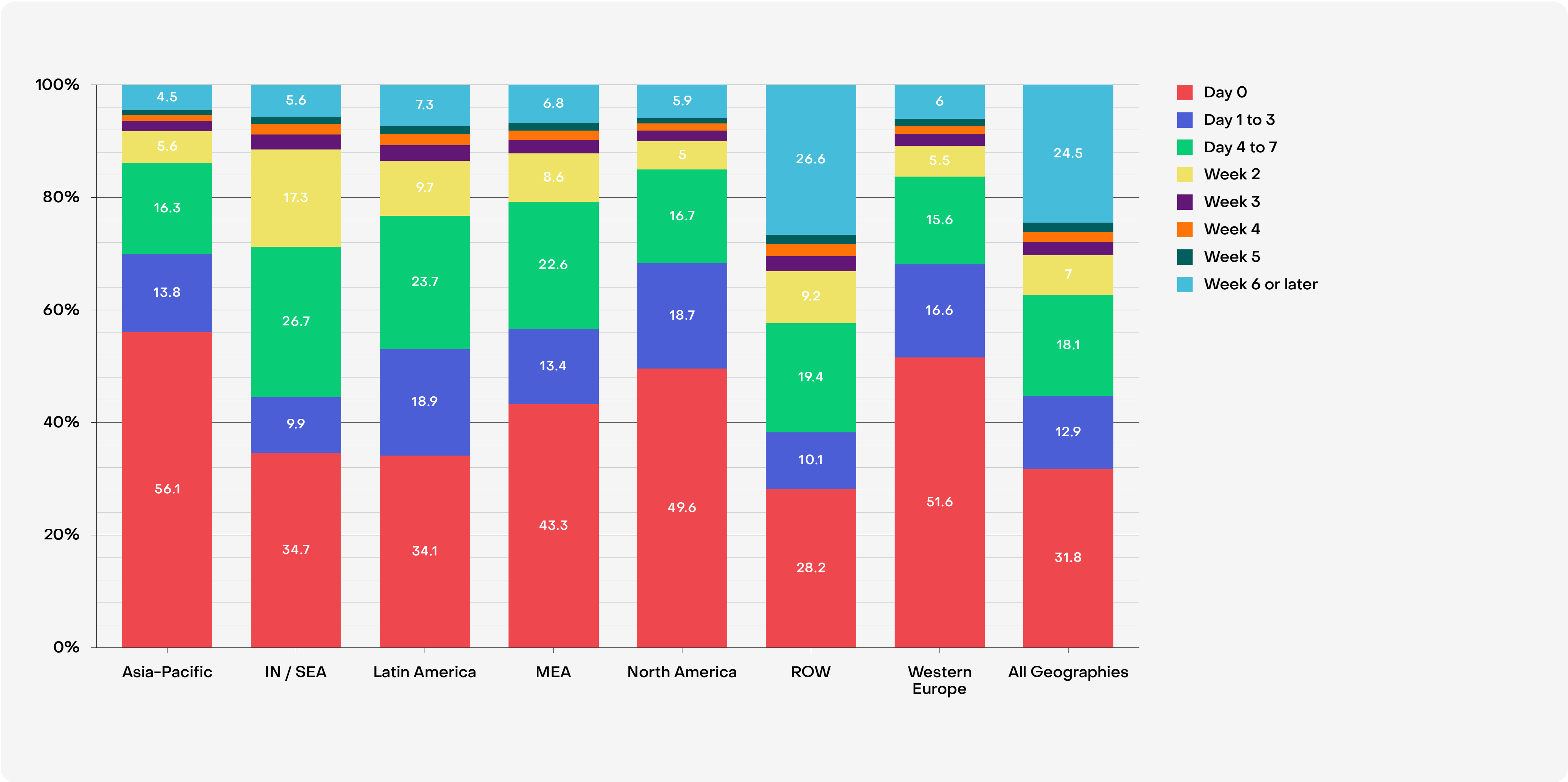
Day 35 Download to Paid Conversion Rate, By Geography

North America leads in converting downloads to paid users, with a median rate of 1.8%, reflecting strong demand for AI-powered photo and video enhancements.



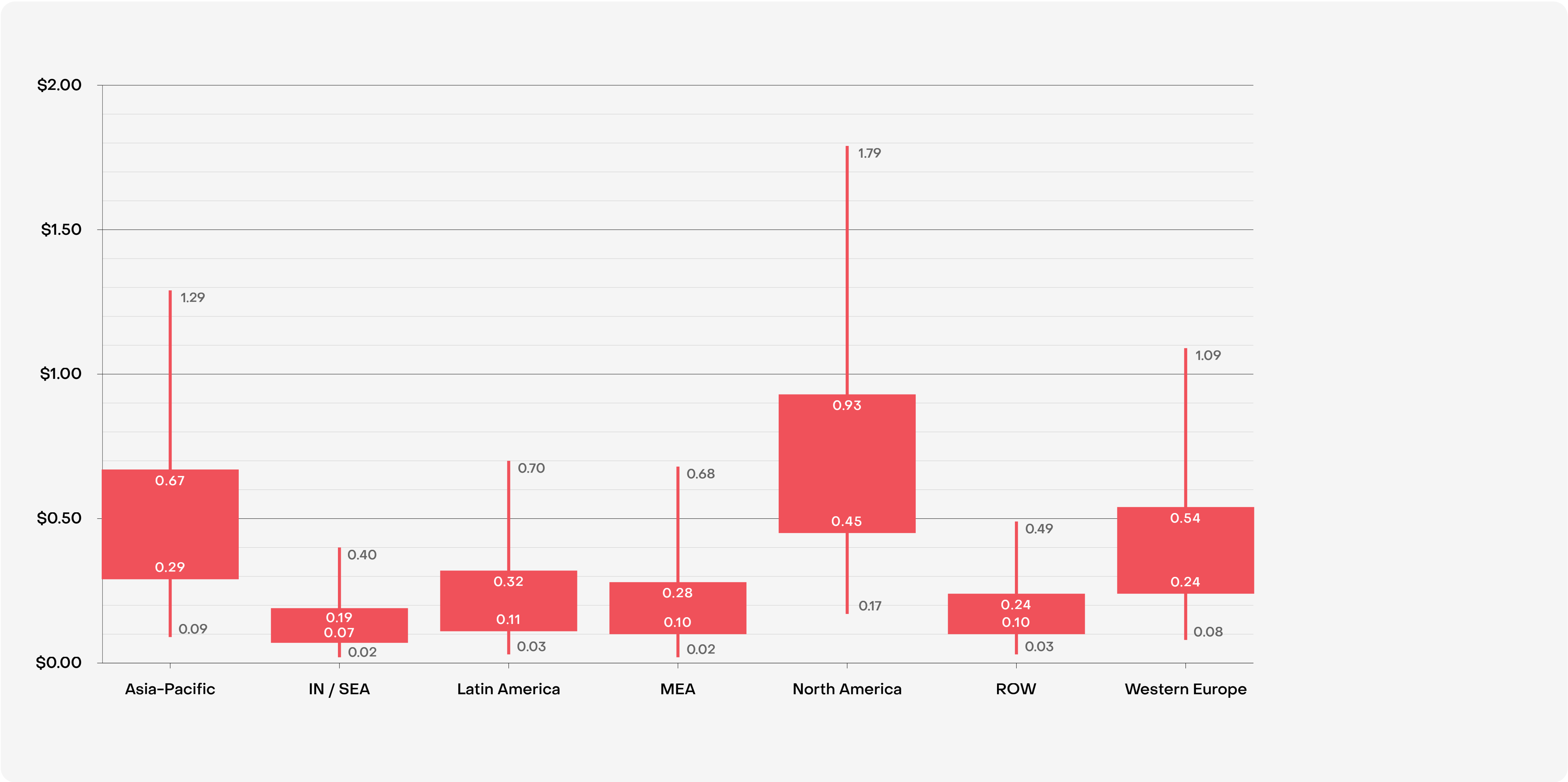
Time to Paid, By Geography

A majority of purchases happen on Day 0 in Asia-Pacific (56.1%) and North America (49.6%), showing that users are often ready to pay immediately for premium editing tools.



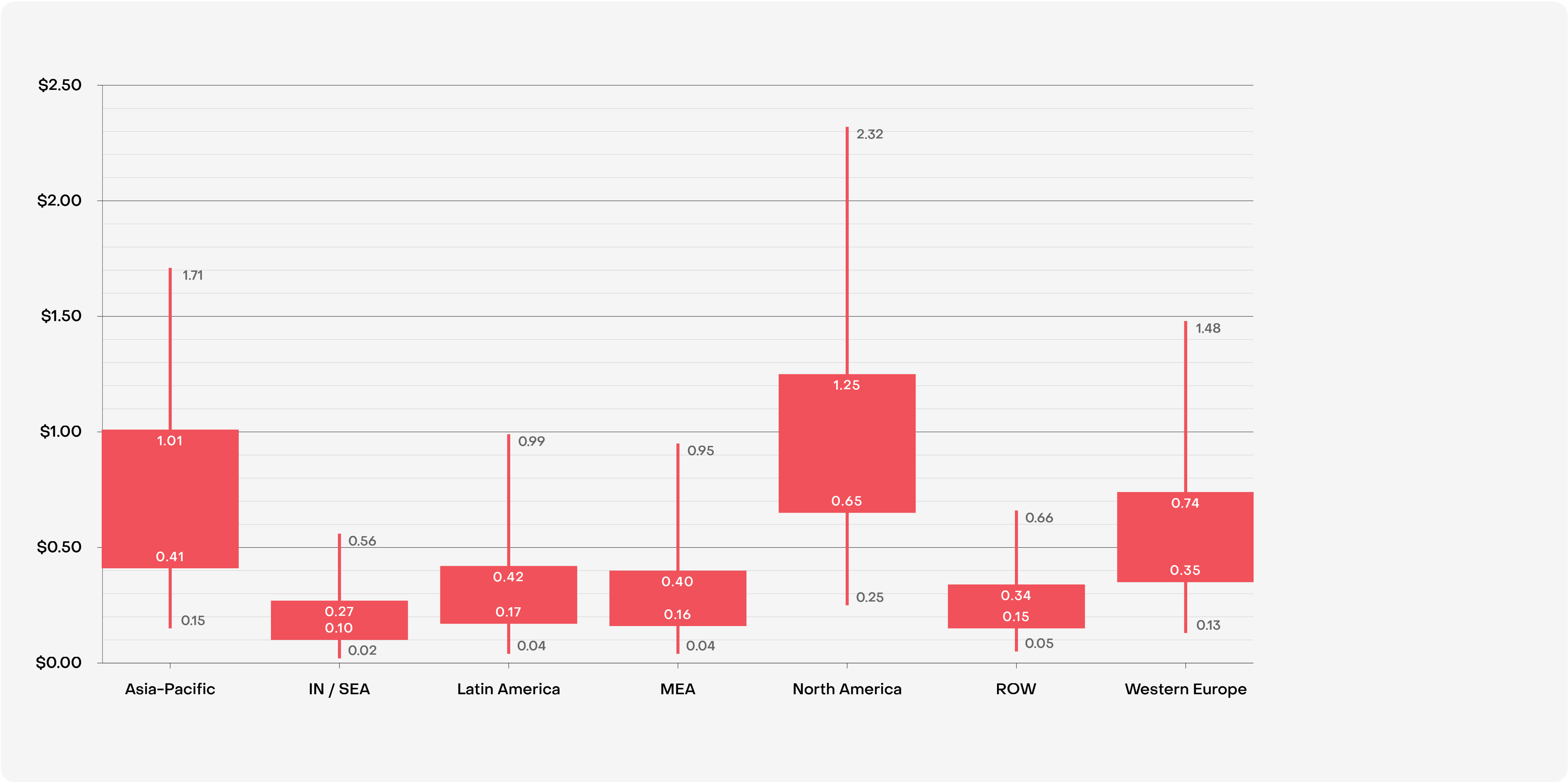
Day 14 Revenue per Install, By Geography

India/Southeast Asia has the lowest revenue per install, with a median of just \$0.07, reinforcing challenges in monetizing users in price-sensitive regions.



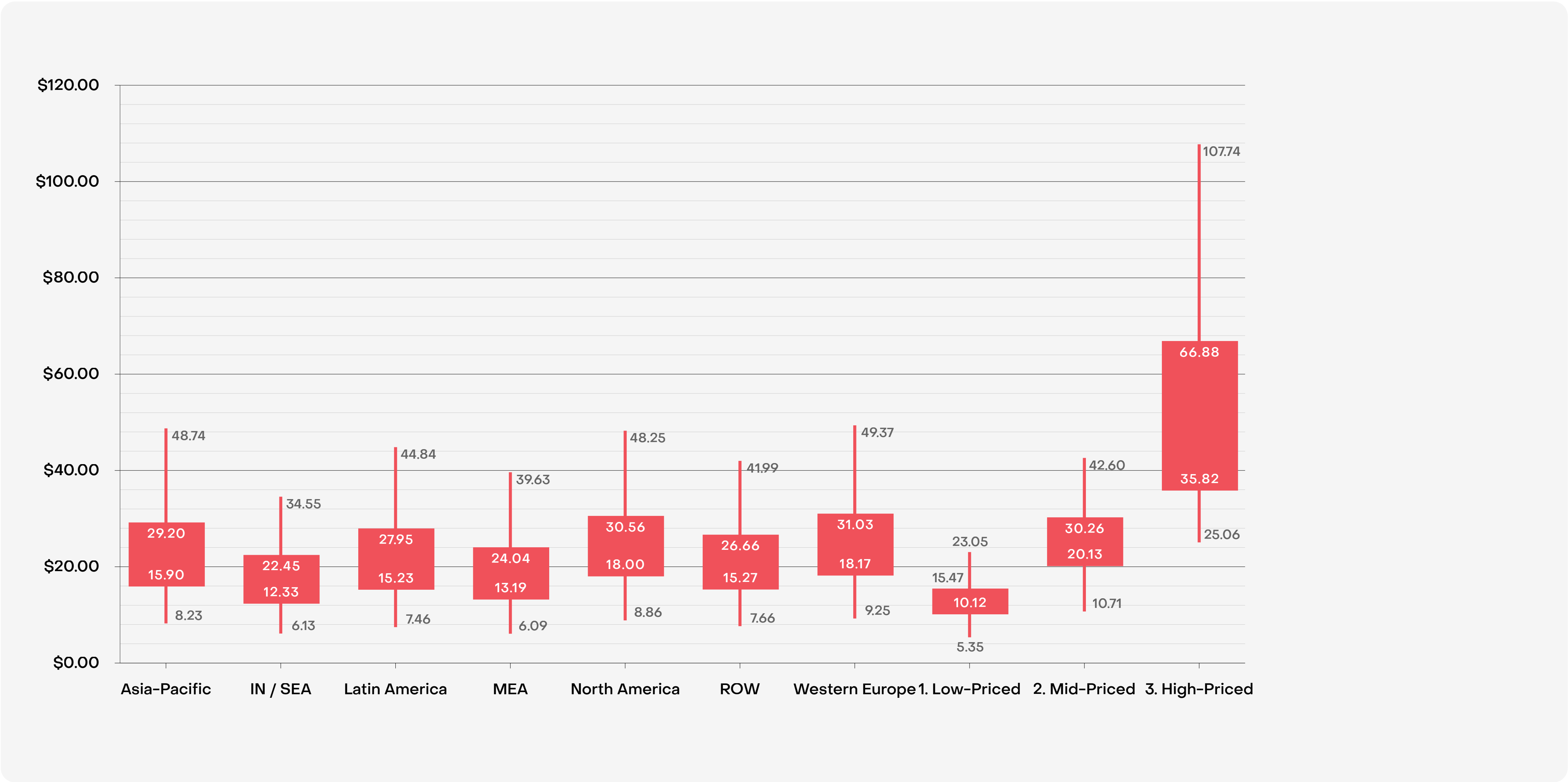
Day 60 Revenue per Install, By Geography

Revenue per install grows significantly over time, with North America reaching a median of \$0.65 by Day 60, demonstrating the impact of long-term user retention.



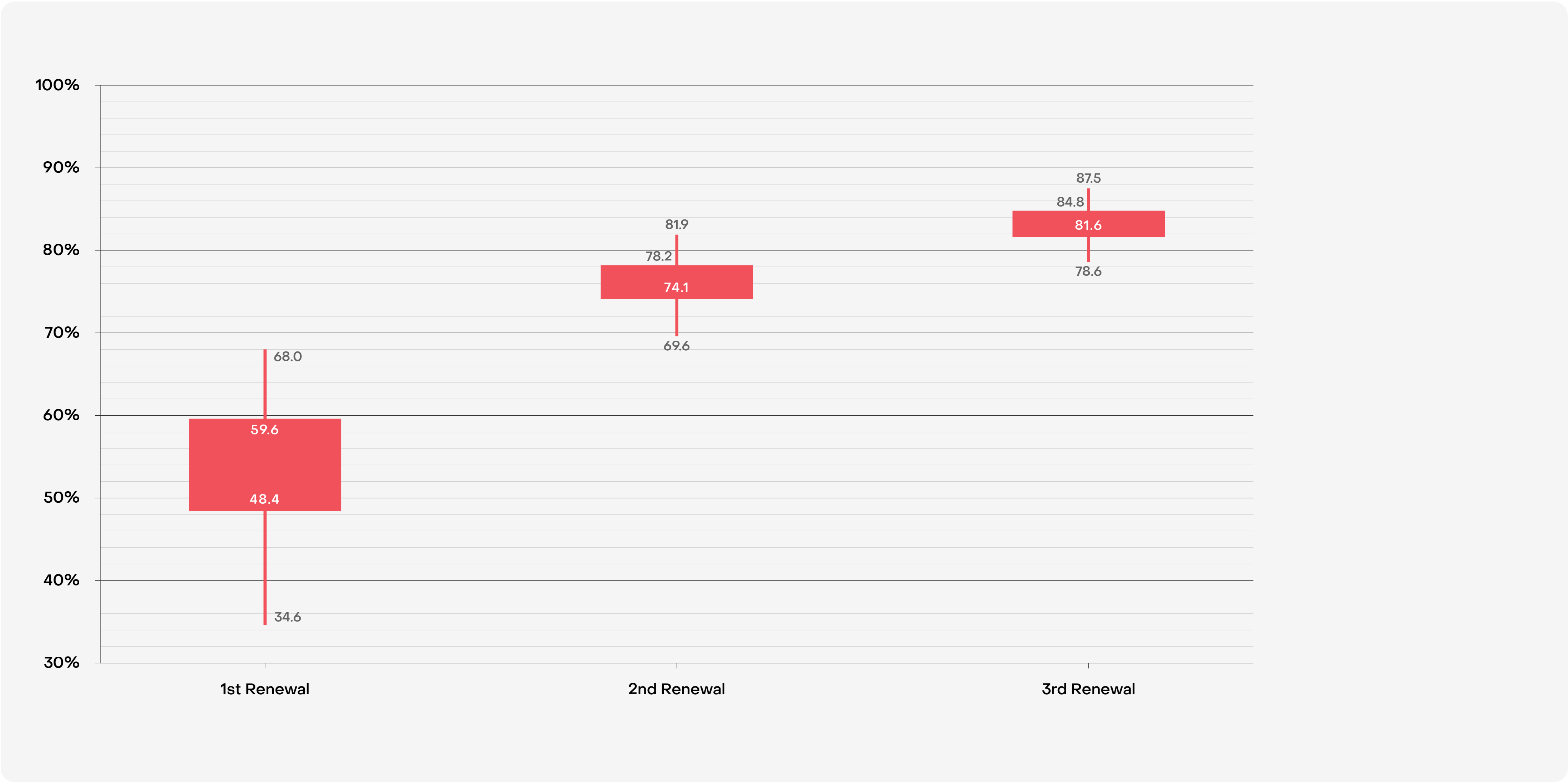
Year 1 Realized LTV per Payer, By Geography and Price Point

High-priced plans drive significantly greater LTV, with a median of \$35.82, far exceeding mid-priced plans at \$20.13, indicating strong demand for advanced features.



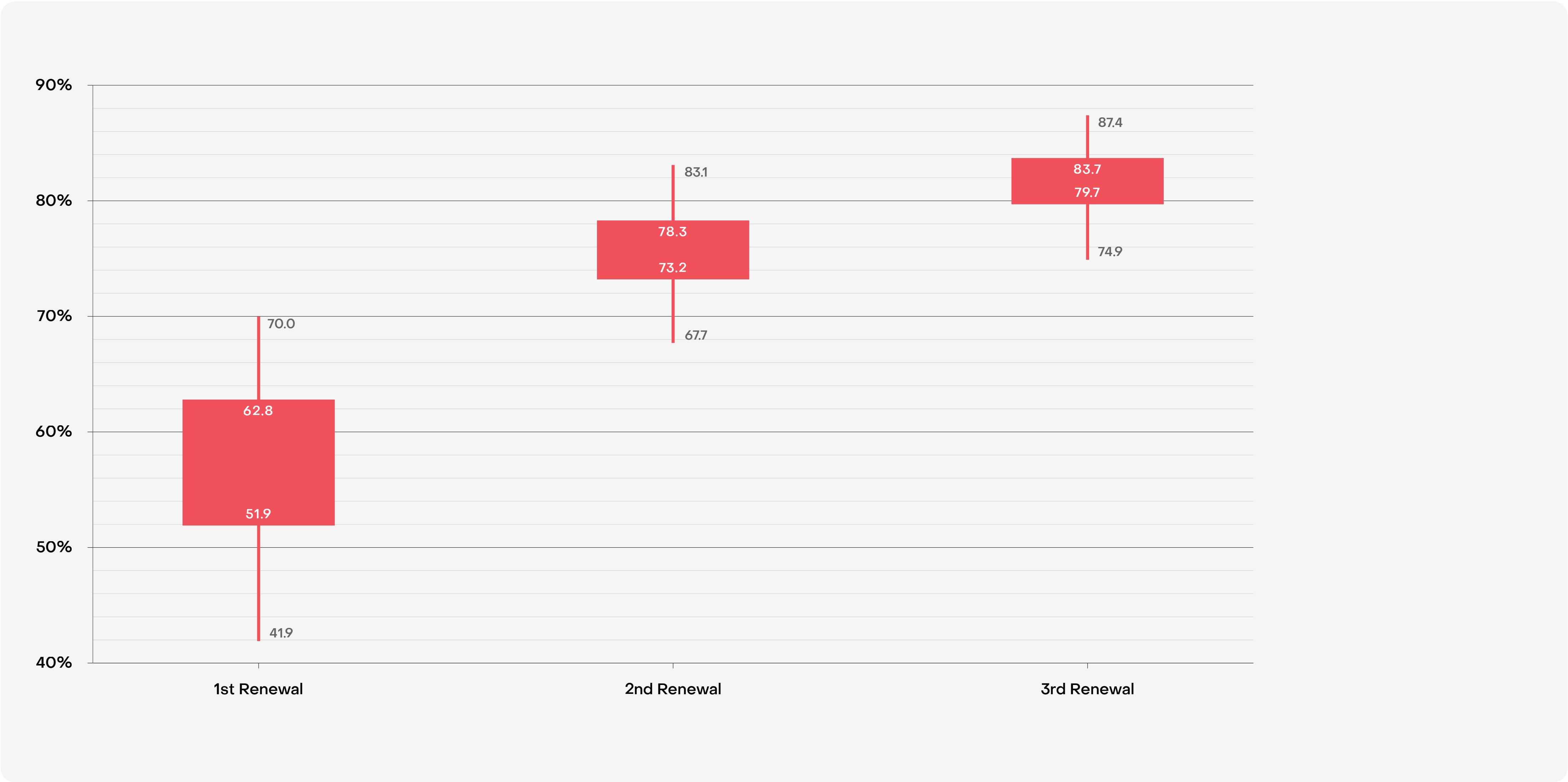
First 3 Weekly Renewals

By the third renewal, retention stabilizes at 81.6%, showing strong commitment among users who stay subscribed past the first few weeks.



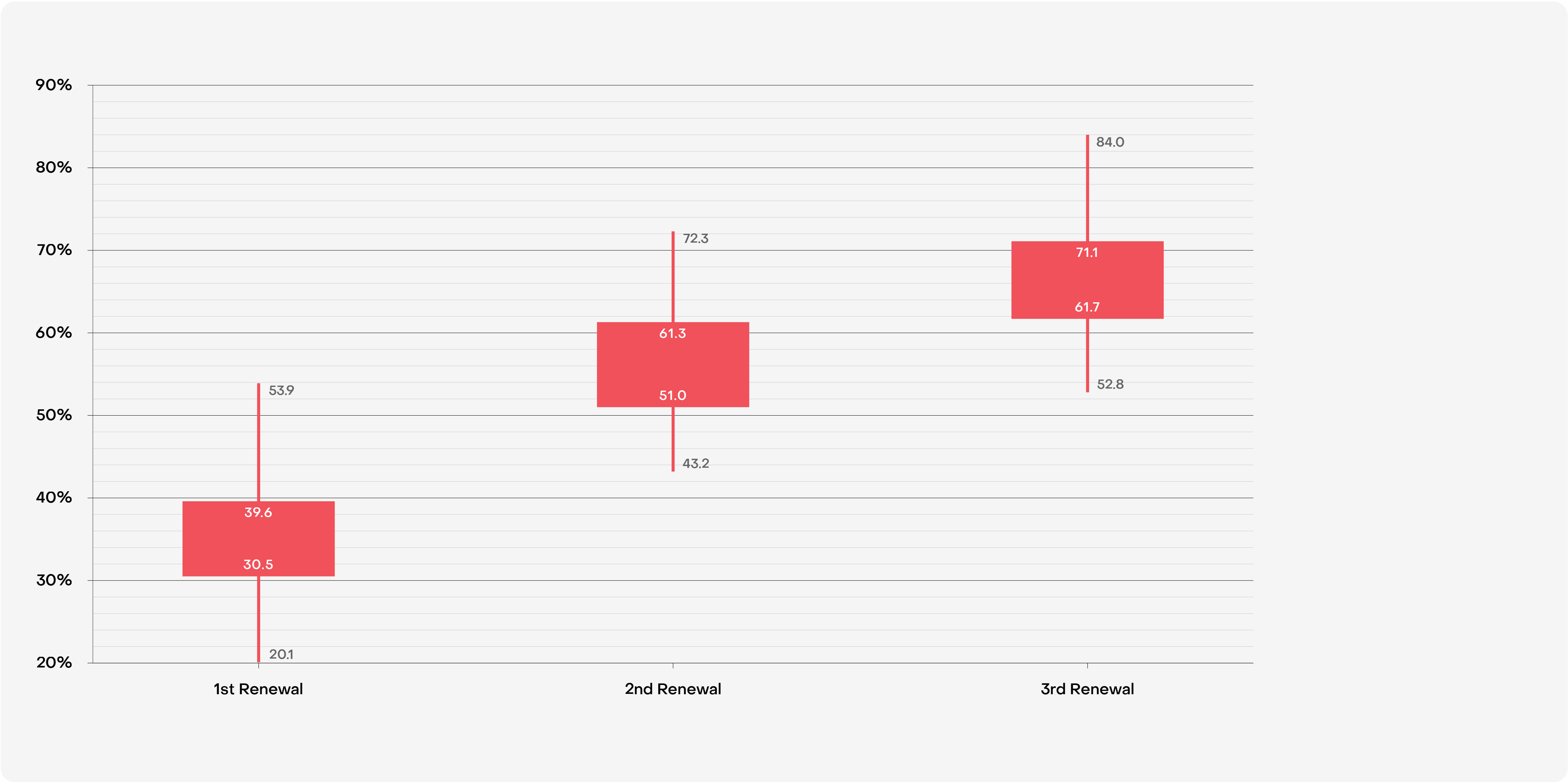
First 3 Monthly Renewals

Monthly retention is solid, with 51.9% of users renewing after the first cycle and 73.2% by the second renewal, suggesting growing user investment in the product.



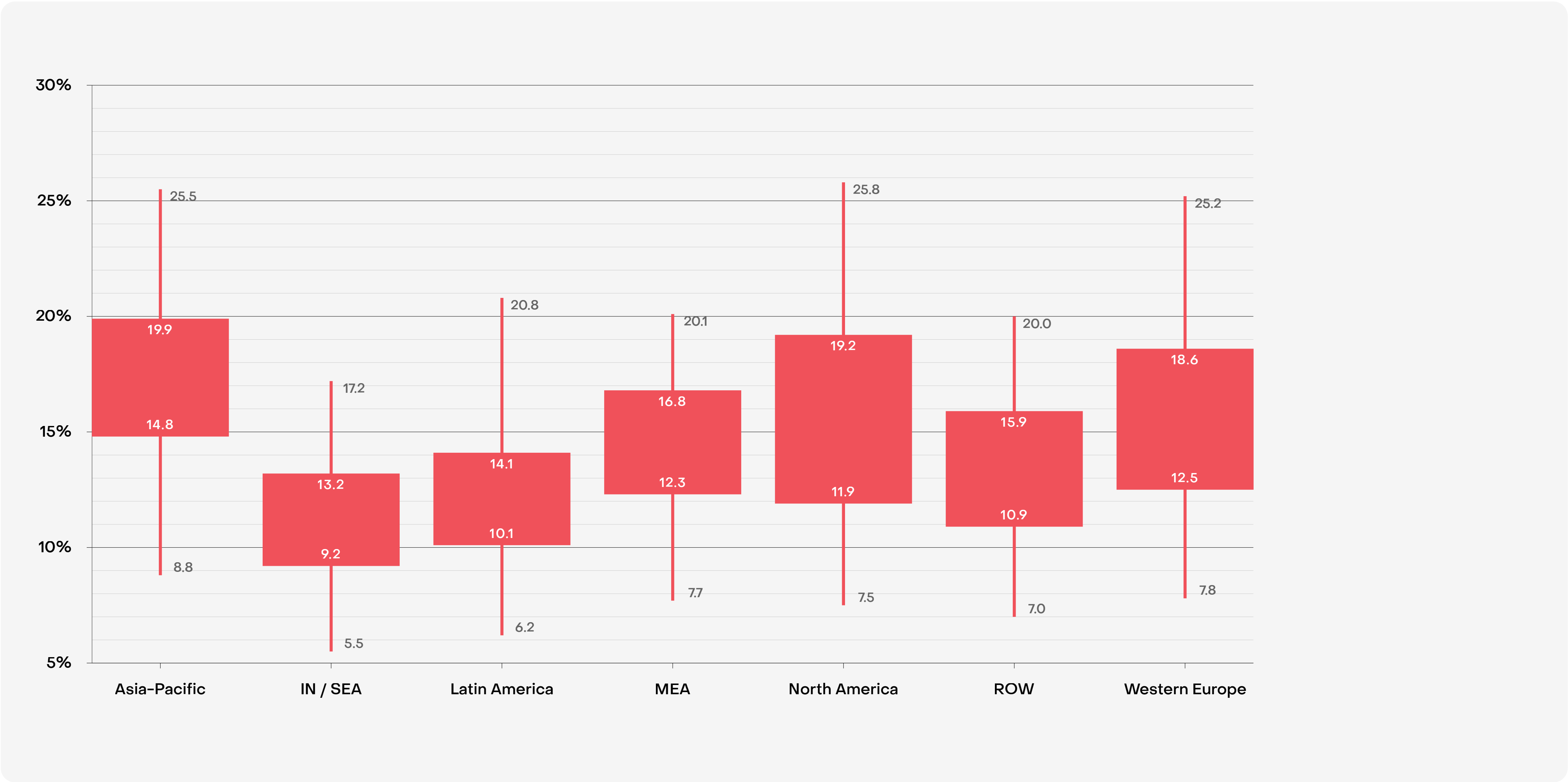
First 3 Annual Renewals

First-year renewal rates for annual plans are lower than shorter durations, with a median of 30.5%, showing that most users reconsider their commitment after a year.



Year 1 Retained Monthly Subscribers, By Geography

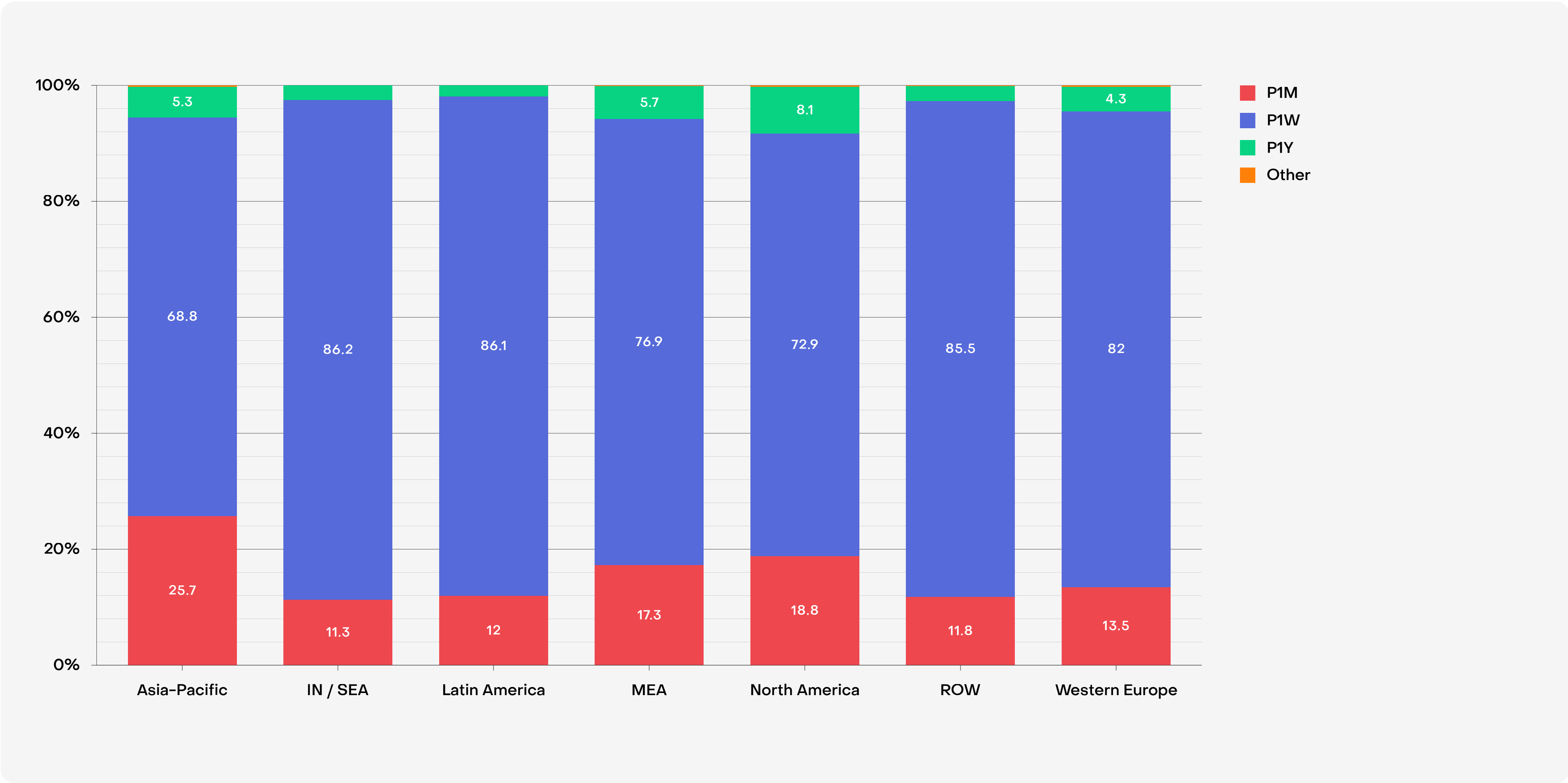
Asia-Pacific has the highest long-term retention, with a median of 14.8%, suggesting that users in this region continue engaging with paid creative tools.



Gaming

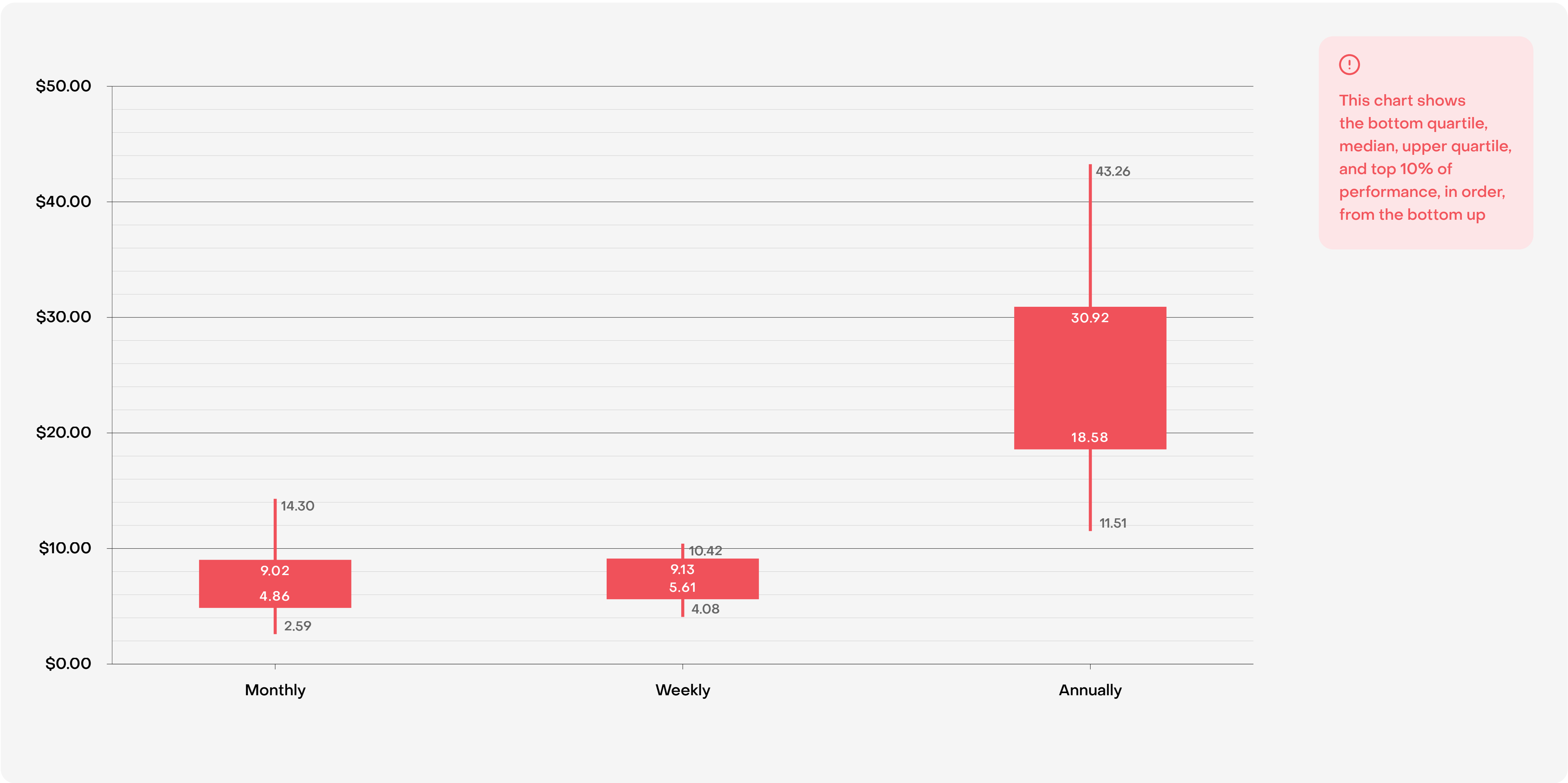
Share of Subscriptions Sold, By Geography

Weekly subscriptions dominate, making up over 80% of purchases in regions like India/Southeast Asia and Latin America, reflecting a preference for short-term access rather than long-term commitments.



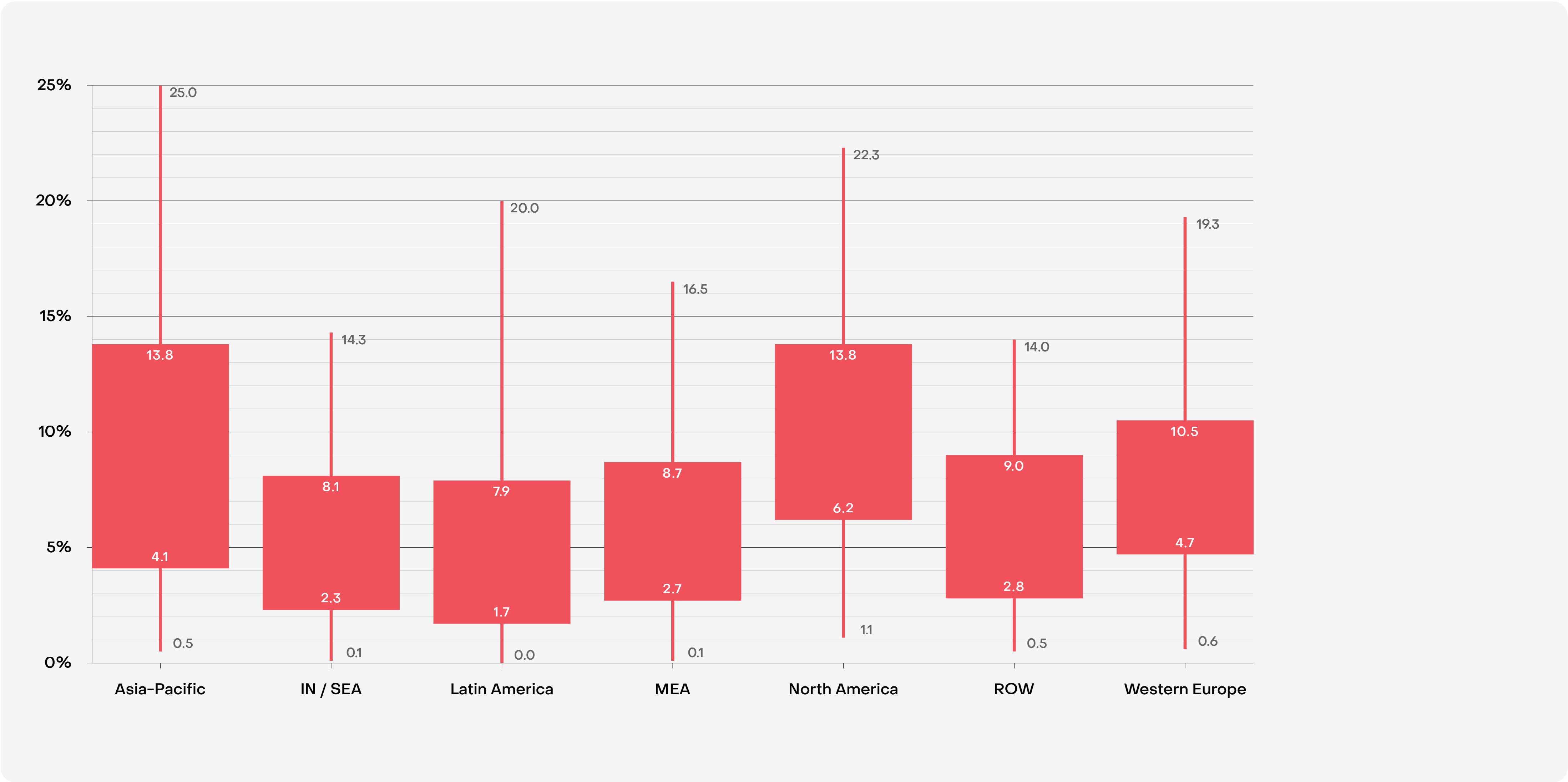
Price Points per Plan Duration

Annual plans are significantly cheaper in the long run, with a median of \$18.58, offering better value for highly engaged players willing to commit.



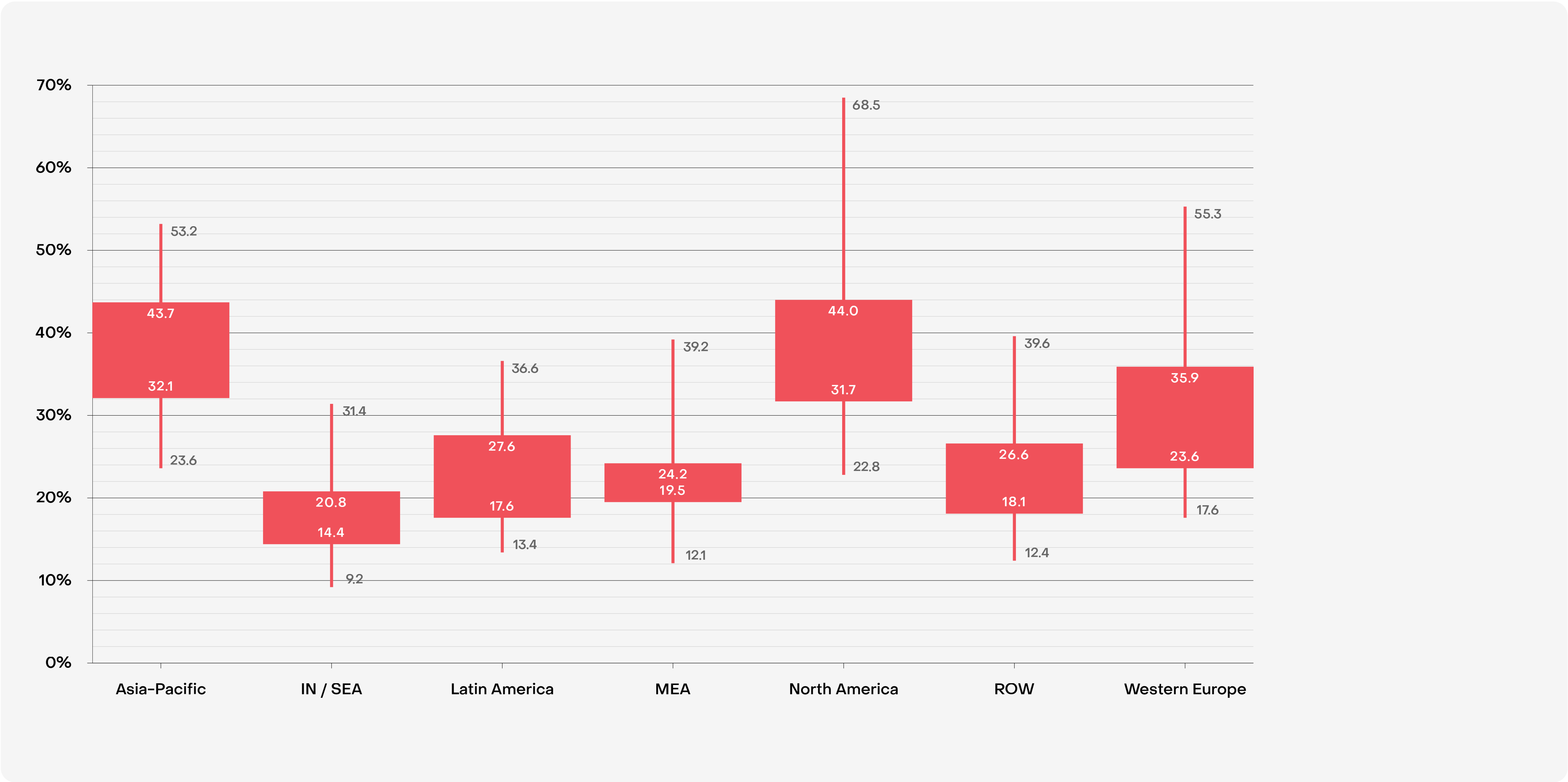
Trial Start Rate, By Geography

India/Southeast Asia and Latin America have the lowest trial engagement, with median rates below 2.5%, indicating that users in these markets may prefer direct purchases or free-to-play models.



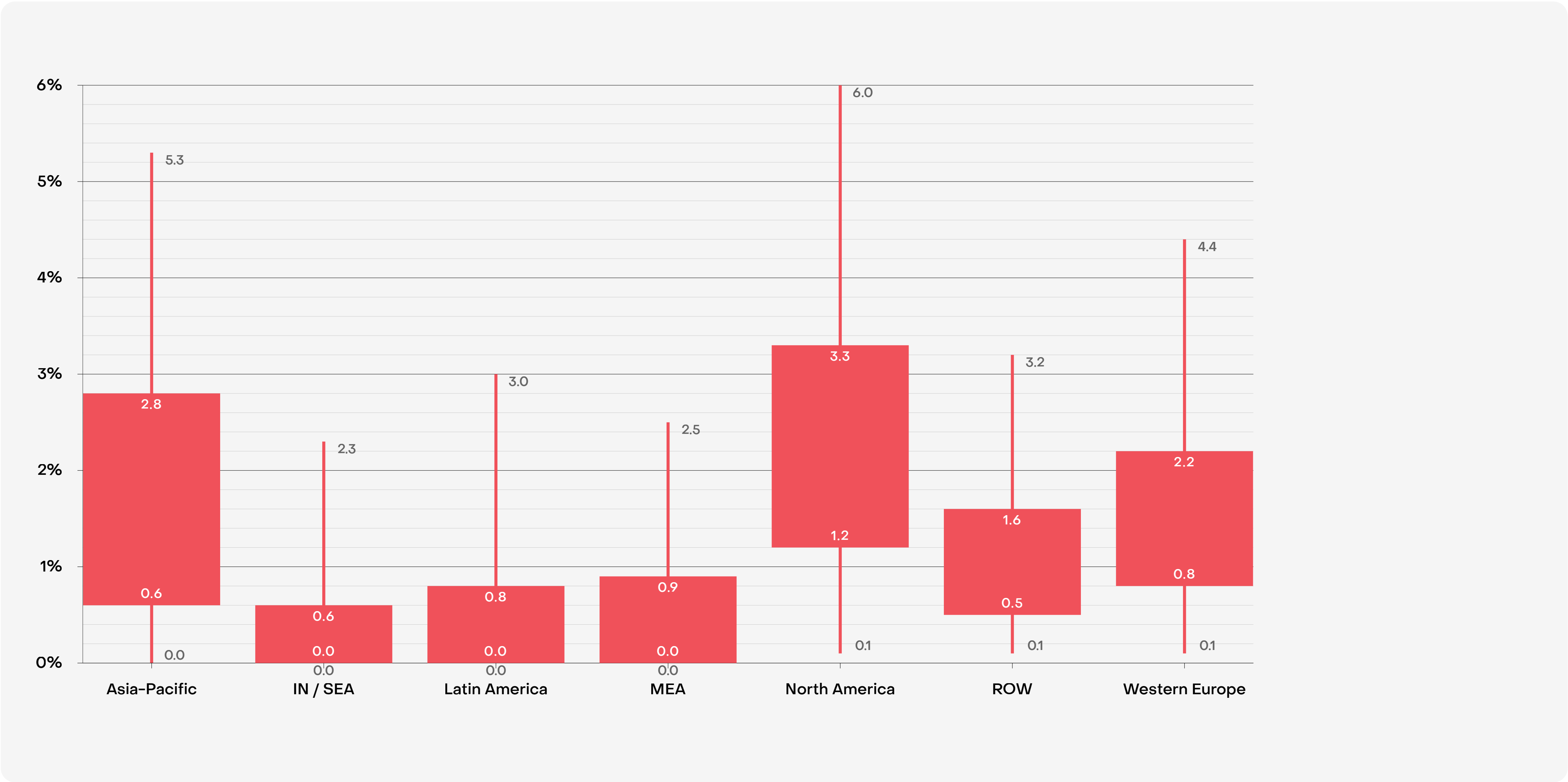
Trial to Paid Conversion Rate, By Geography

North America and Western Europe see the highest trial-to-paid conversion rates, with median rates above 30%, suggesting that engaged trial users are more likely to subscribe.



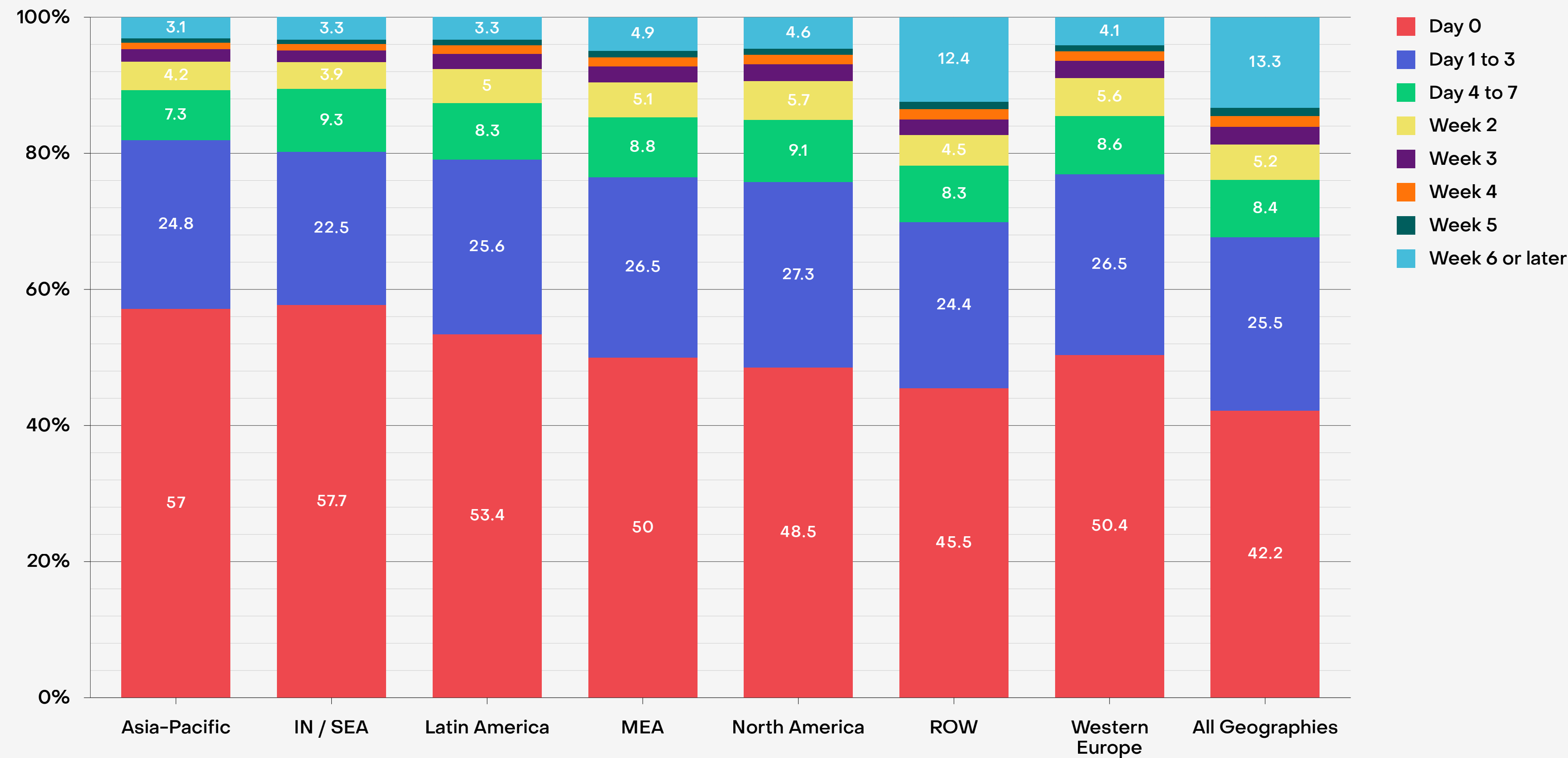
Day 35 Download to Paid Conversion Rate, By Geography

North America has the strongest conversion from downloads to paid users, with a median of 1.2%, indicating that a small but engaged group of players are willing to subscribe.



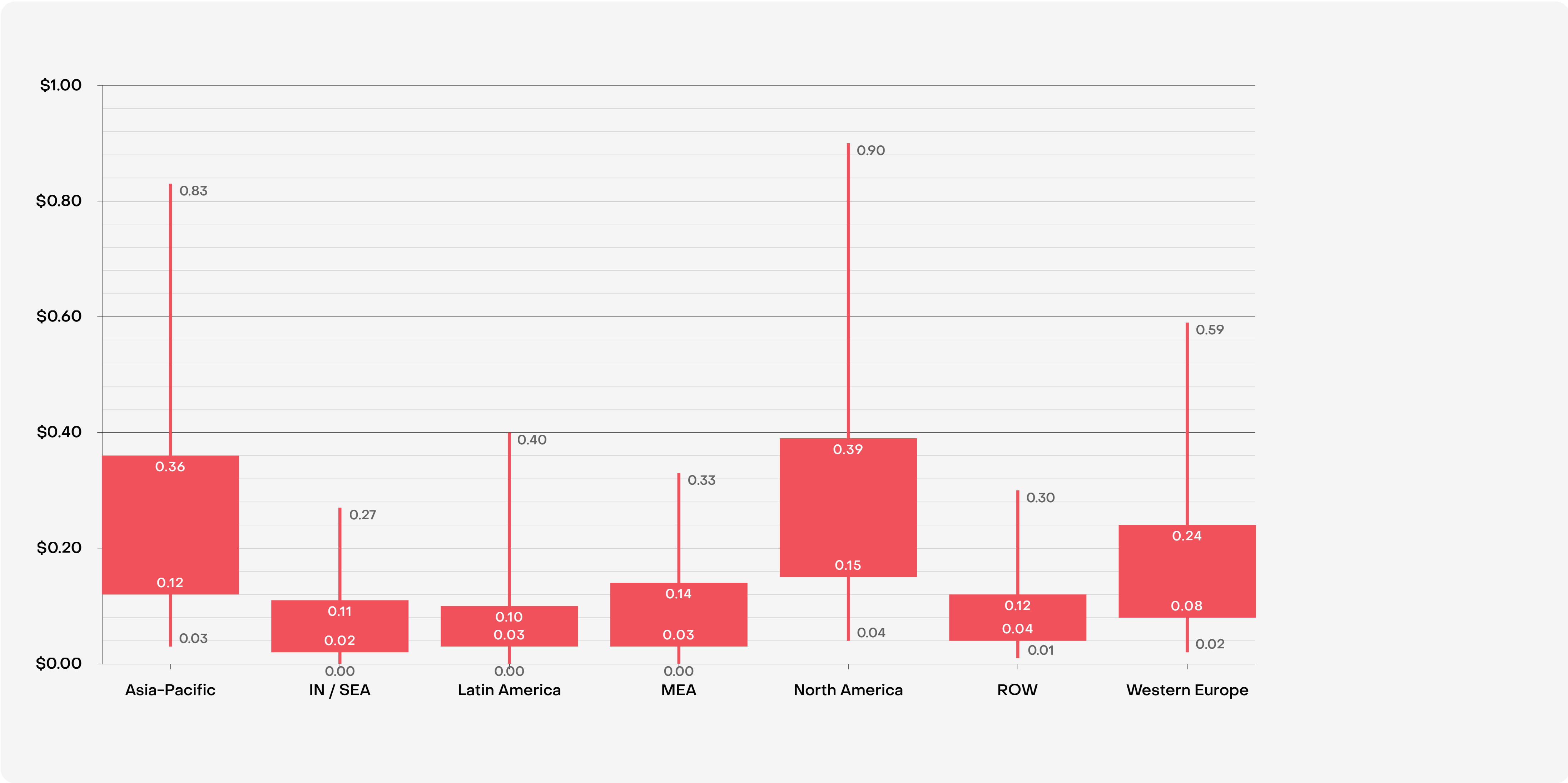
Time to Paid, By Geography

Over half of users convert on Day 0 across all regions, peaking at 57.7% in India/ Southeast Asia, suggesting immediate demand for premium gaming features.



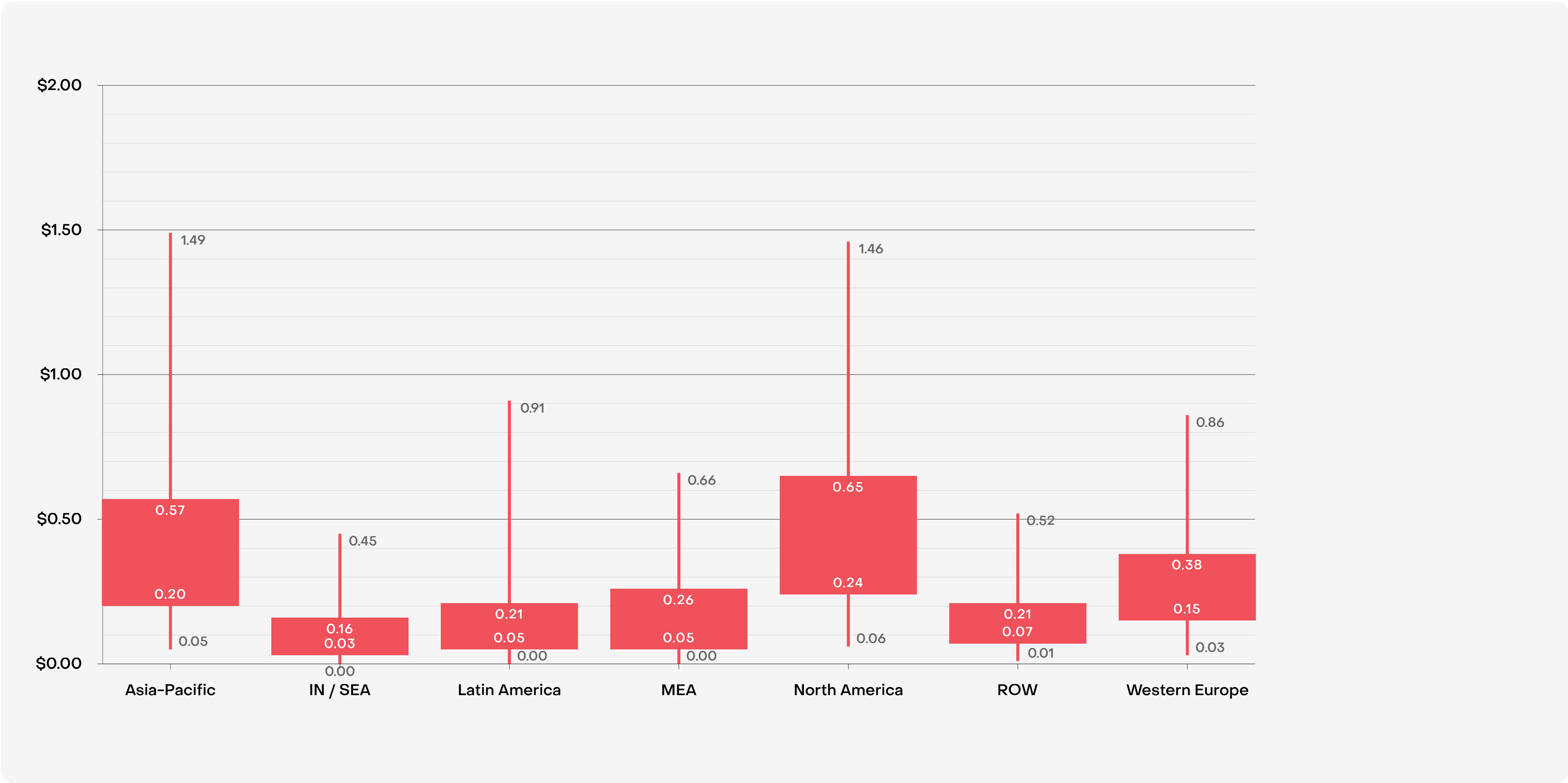
Day 14 Revenue per Install, By Geography

India/Southeast Asia and Latin America show minimal early revenue, with median values of just \$0.02 and \$0.03, reinforcing the reliance on alternative monetization strategies.



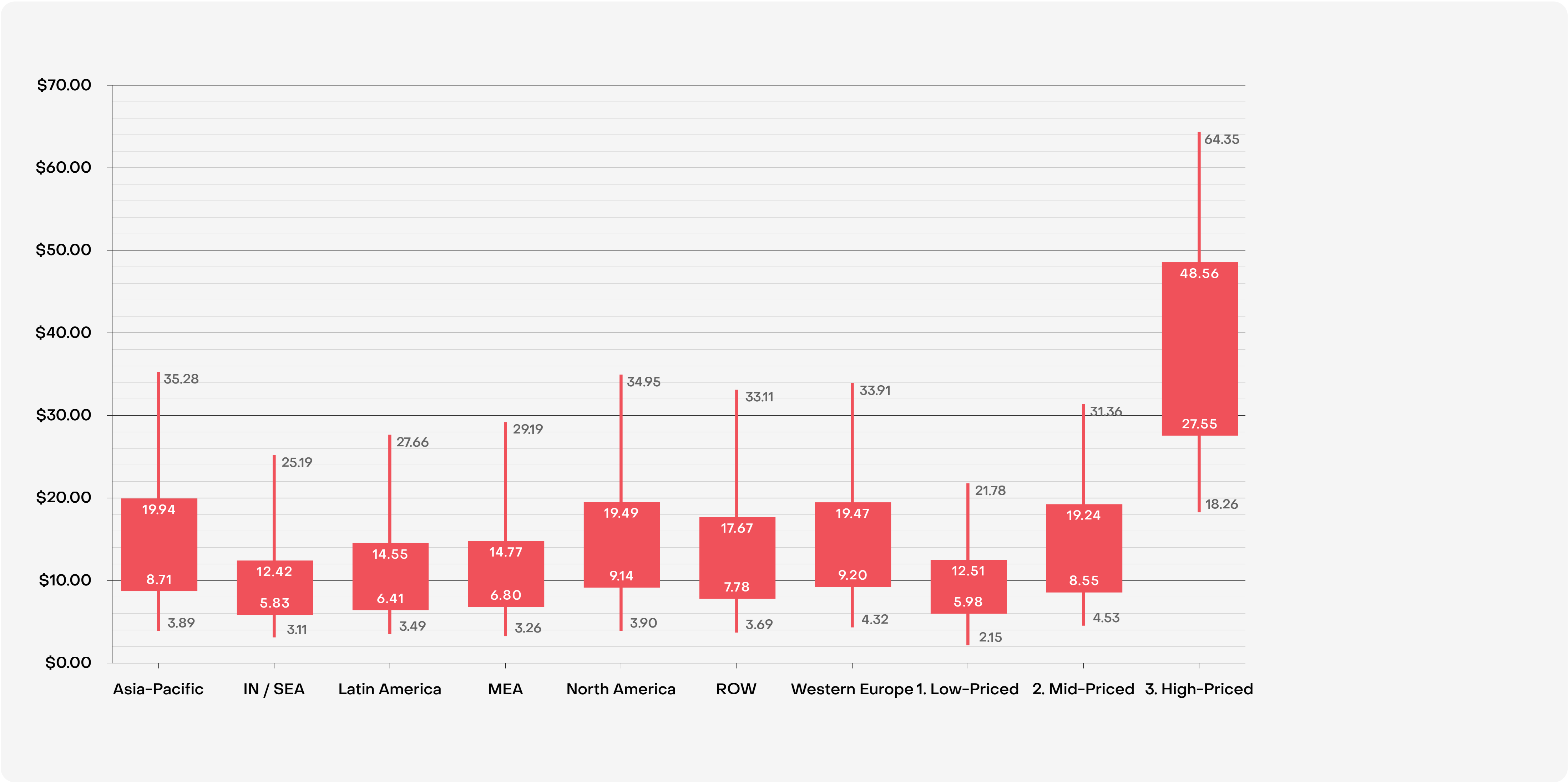
Day 60 Revenue per Install, By Geography

Revenue per install increases modestly over time, with North America reaching a median of \$0.24 by Day 60, highlighting the challenge of sustaining subscription-based gaming revenue.



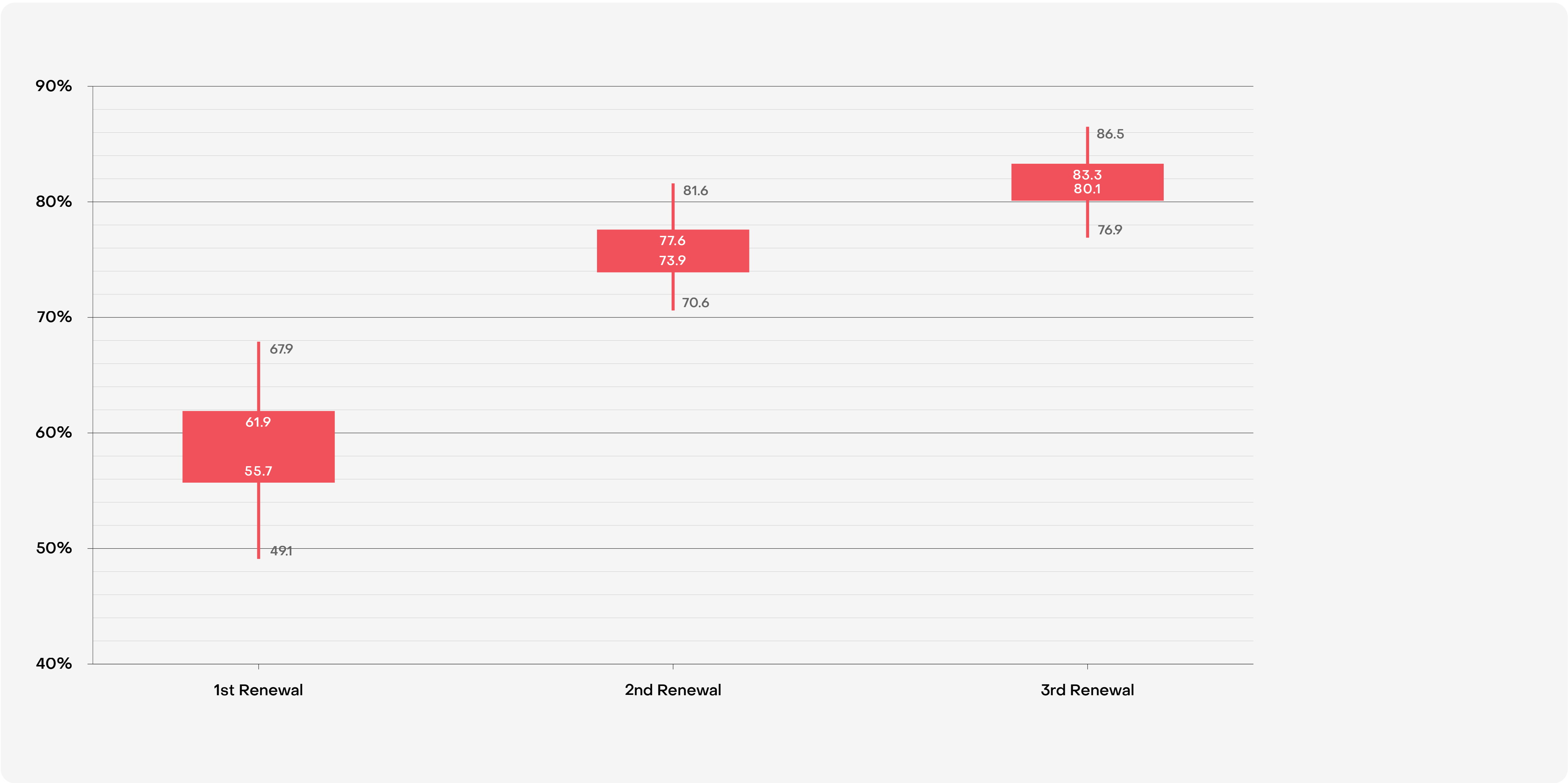
Year 1 Realized LTV per Payer, By Geography and Price Point

Western Europe and North America lead in payer LTV, both with median values above \$9.00, showing stronger long-term monetization potential in these markets.



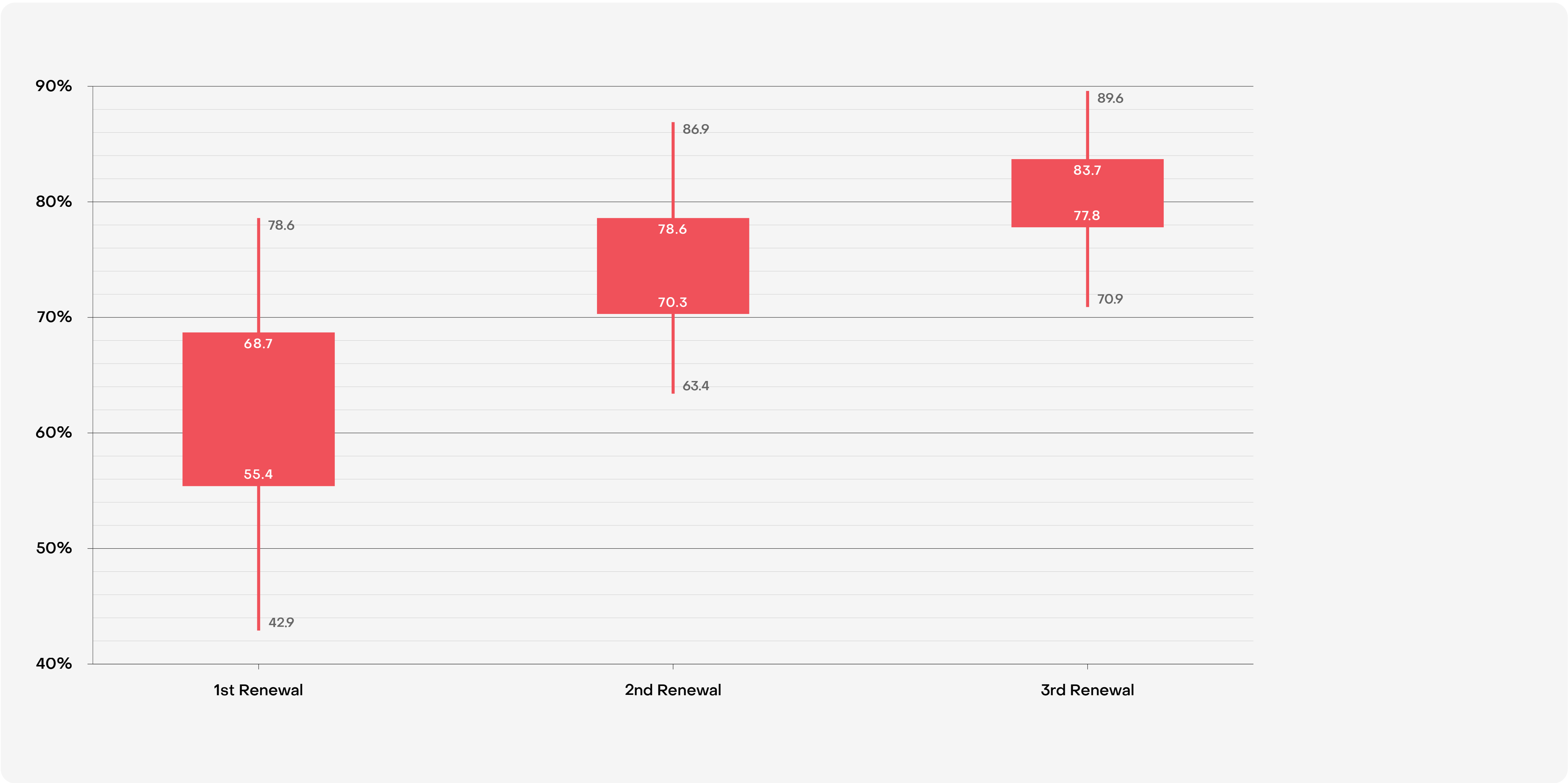
First 3 Weekly Renewals

Retention improves after the first renewal, increasing from 55.7% to 73.9% at the second renewal, suggesting that once users commit, they tend to stay subscribed.



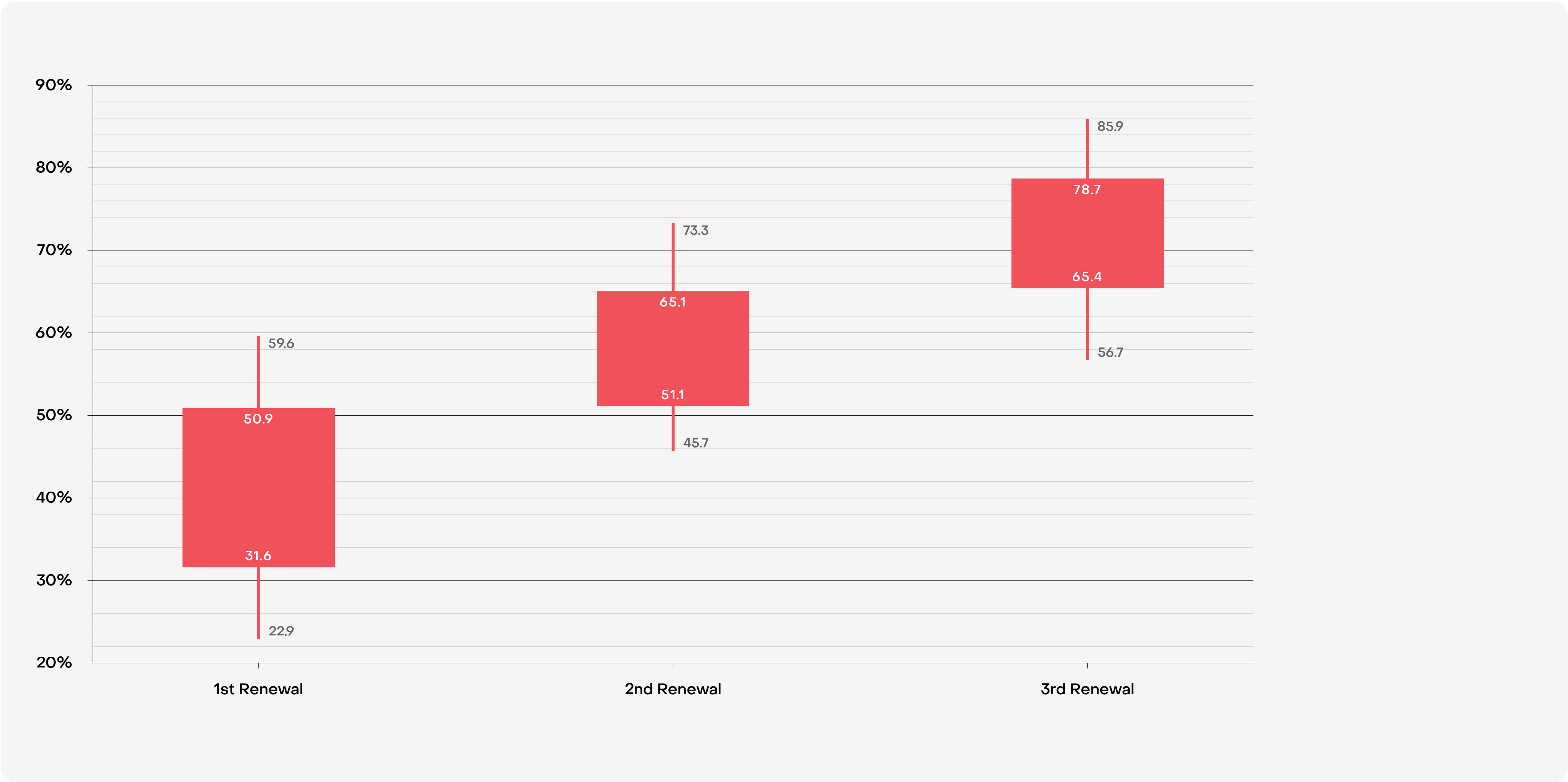
First 3 Monthly Renewals

Long-term engagement remains solid, with 77.8% of third-month renewals staying subscribed, suggesting that gaming subscriptions can build loyalty over time.



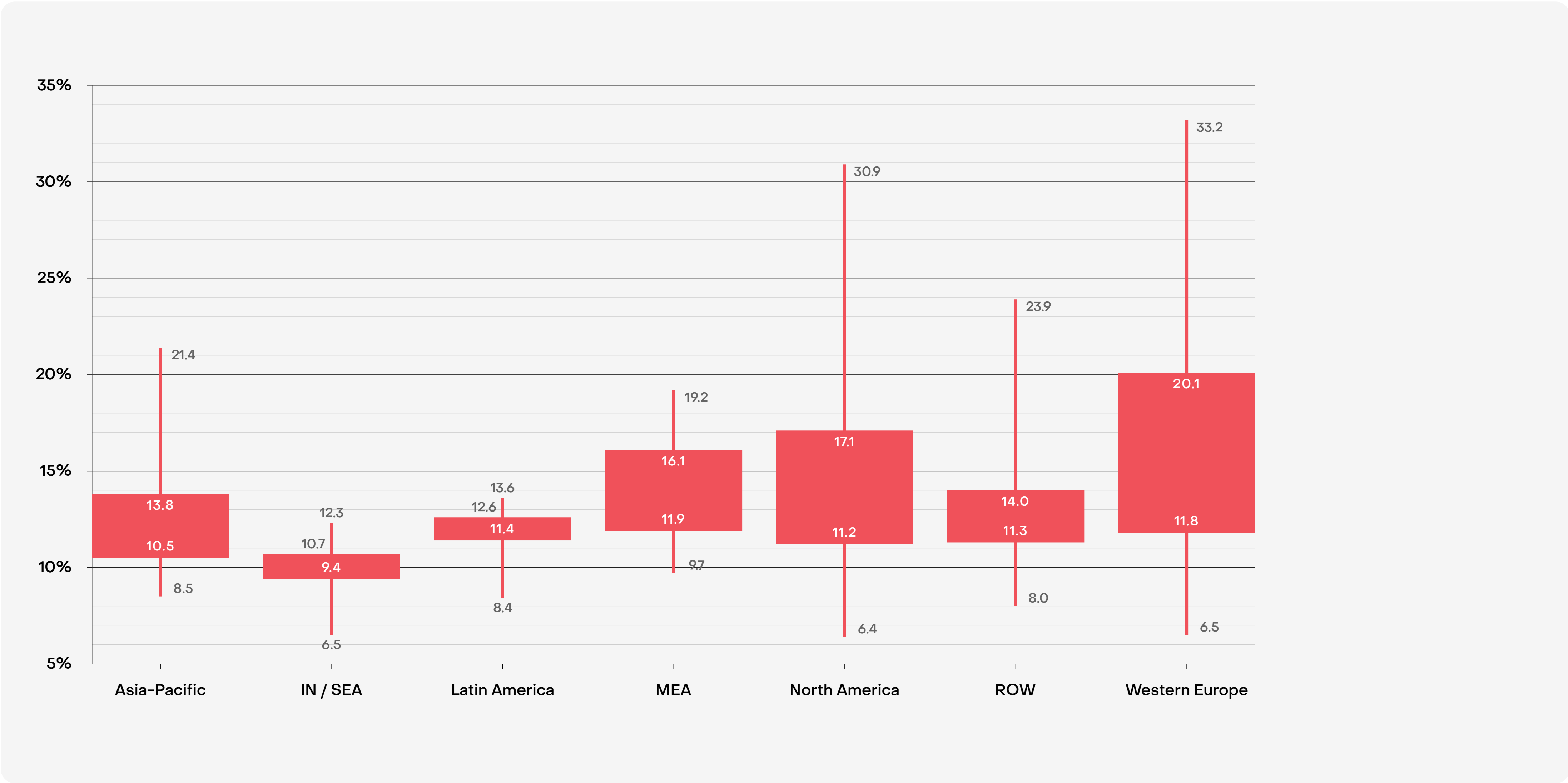
First 3 Annual Renewals

First-year renewal rates for annual plans are lower than shorter durations, with a median of 31.6%, reflecting user hesitancy in committing to a full year.



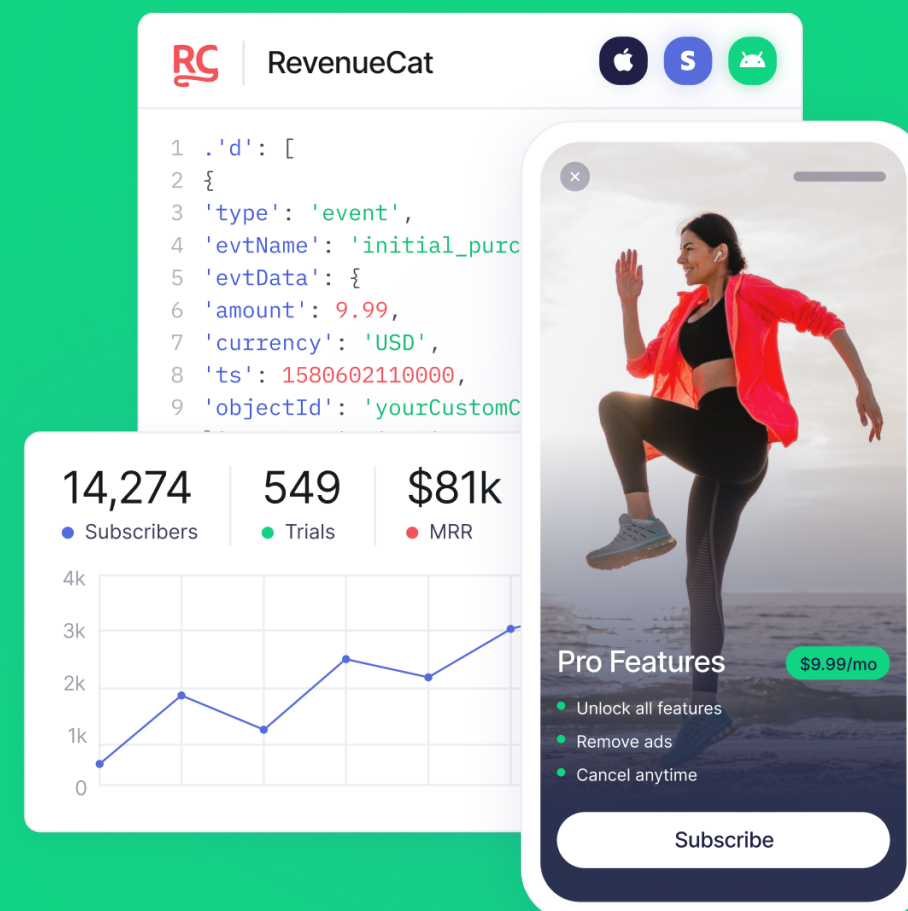
Year 1 Retained Monthly Subscribers, By Geography

Western Europe and North America show the highest long-term retention, with medians of 11.8% and 11.2%, indicating continued engagement with paid gaming services.



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