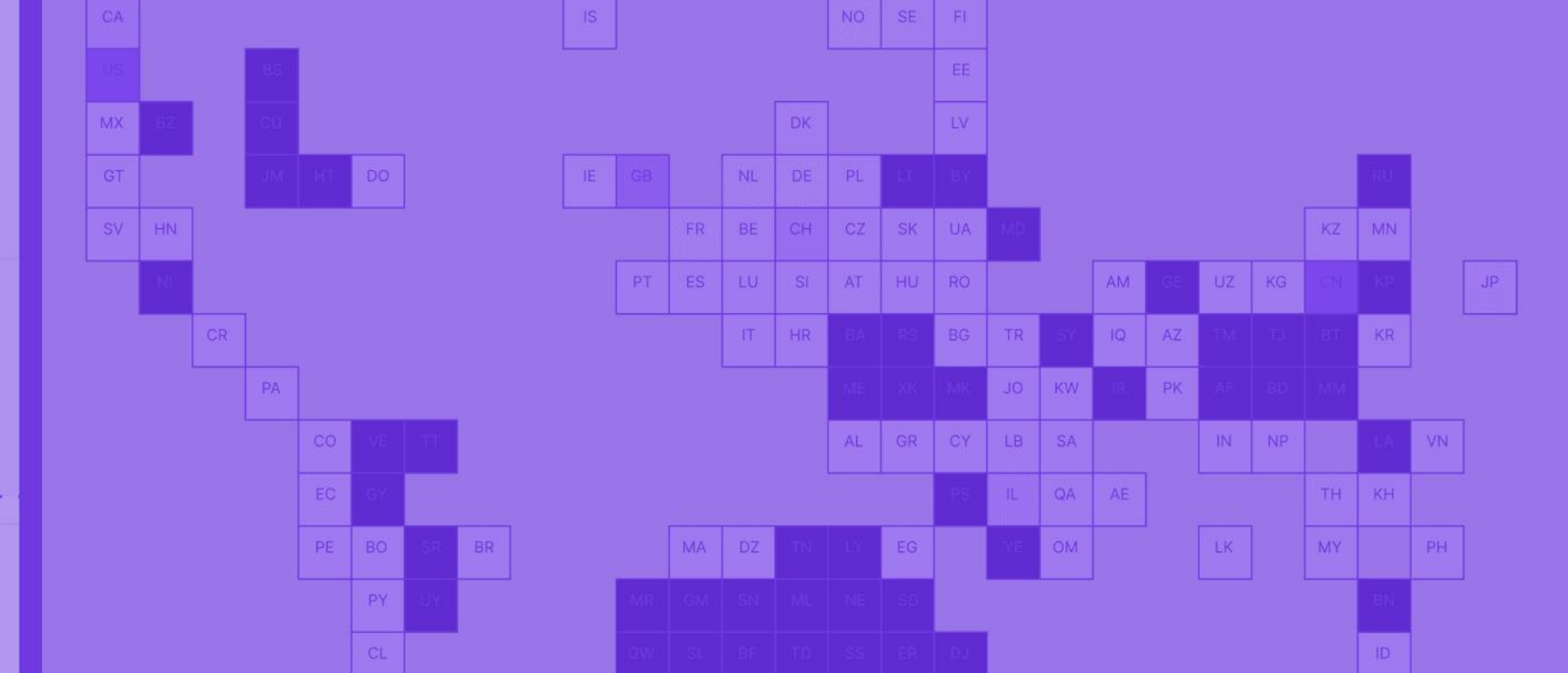
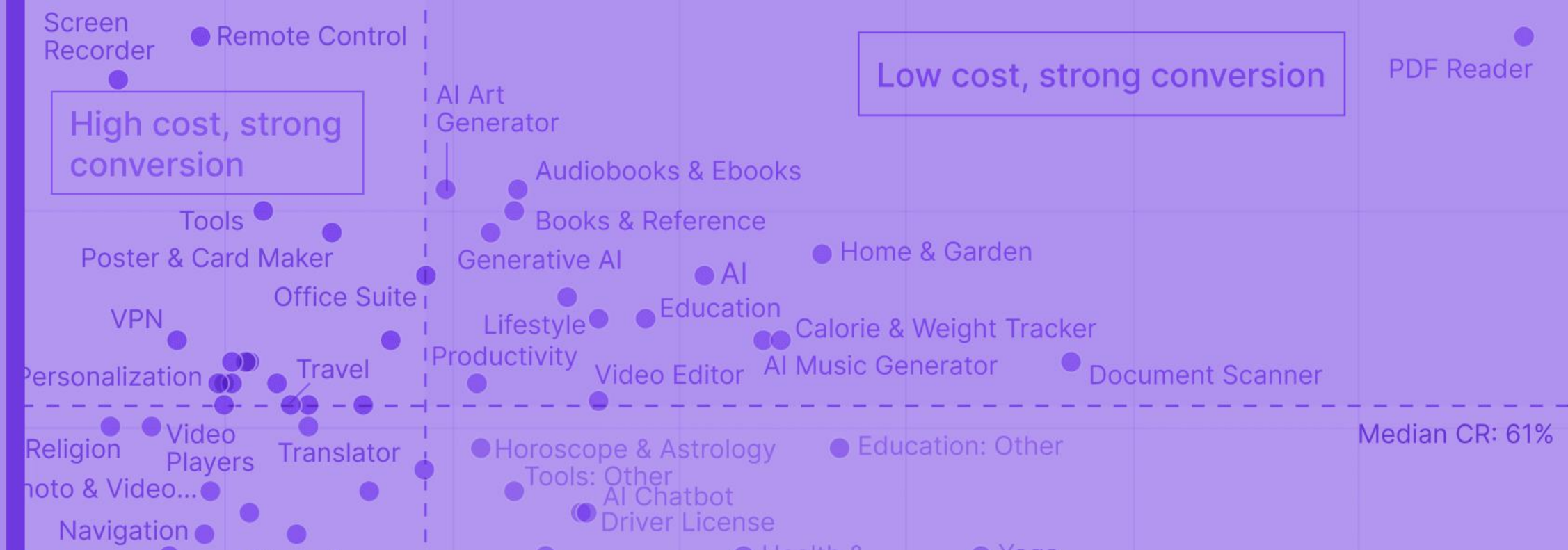
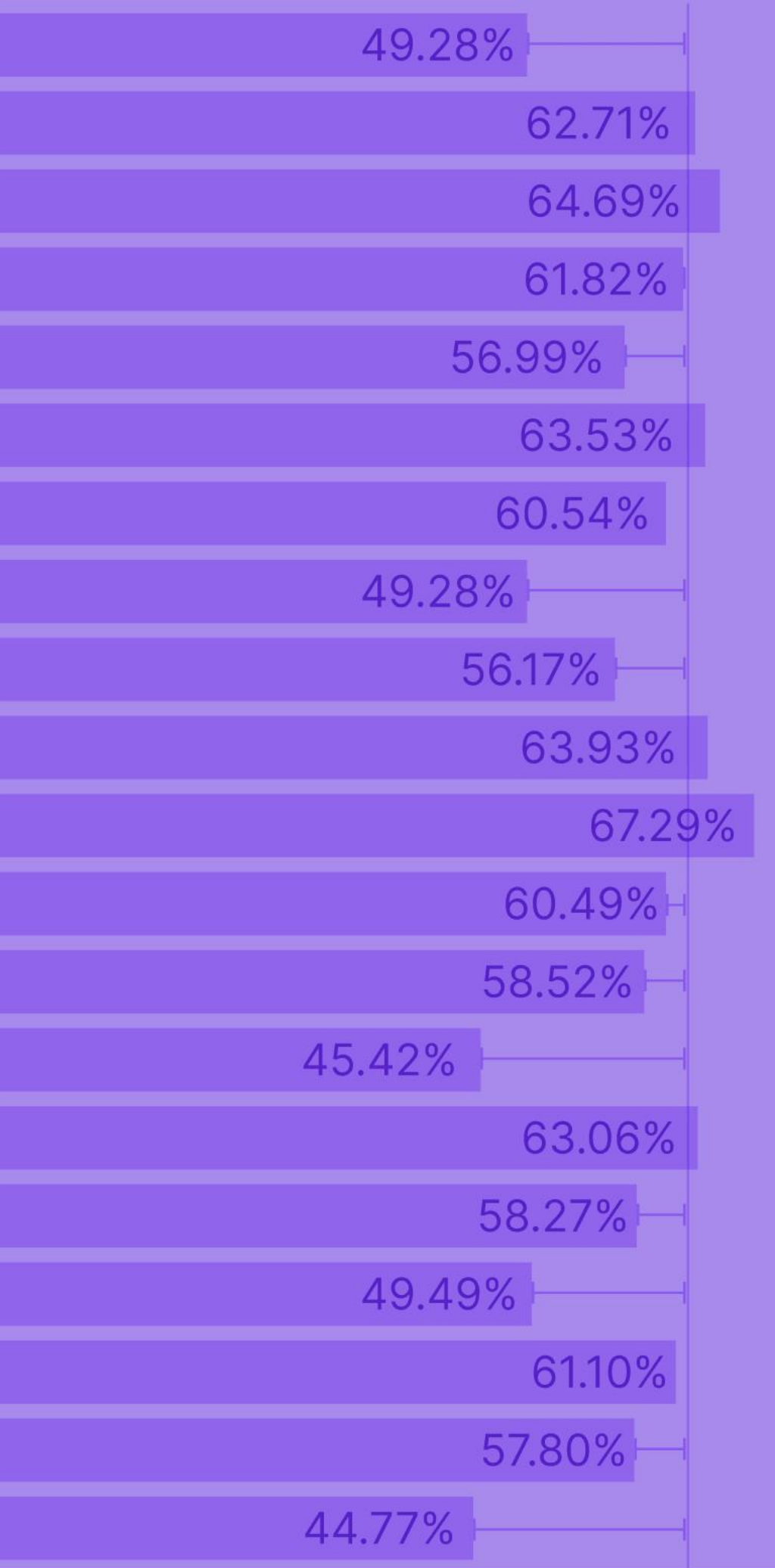
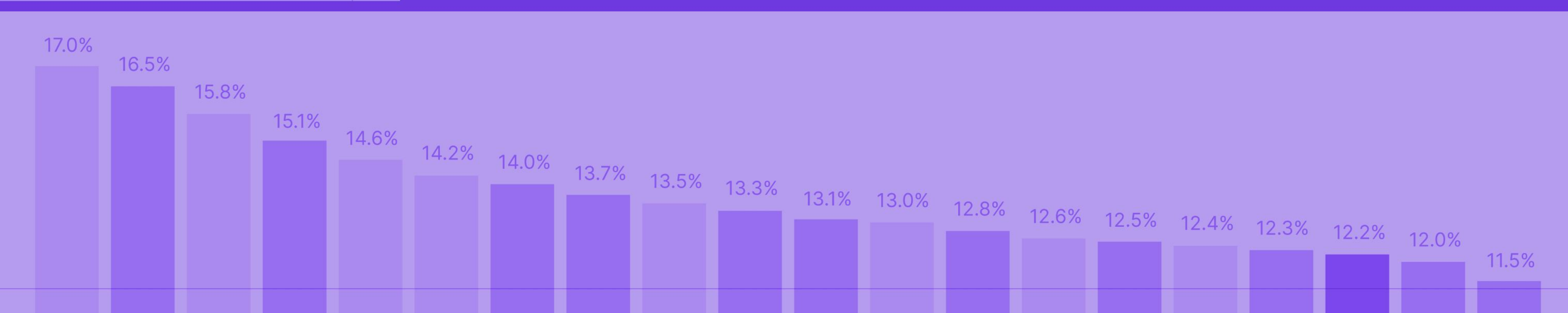




adapty

Apple Ads for subscriptions apps 2026



- Romania
- South Africa
- Brazil
- Azerbaijan
- Albania
- Ecuador
- Croatia
- Portugal
- Jordan
- Colombia
- Oman
- France
- Kenya
- United Arab Emirates
- Ukraine
- Saudi Arabia
- Poland
- Kuwait
- Peru
- Paraguay

Methodology

Privacy

We processed data in batches and anonymized it before aggregation. We don't expose individual apps, campaigns, or account-level performance.

Statistical approach

We report medians and percentiles alongside averages where distribution matters. For CPP and paywall uplift, we use relative percentage changes rather than absolute values, since uplift multipliers hold across a wider range of apps than fixed baseline rates.

Period

January-December 2025.

Scope

This report draws on Apple Ads performance data from 8000+ apps running campaigns through Adapty's Apple Ads Manager, across:

1M+

ad groups

59

niches

90

countries

Data quality

Benchmarks start at the ad group level and aggregate upward to prevent a few high-spend accounts from skewing results. We applied minimum dataset thresholds to ensure statistical reliability.

A niche was included only if it met all four criteria:

- Minimum 2 apps contributing data per niche, to avoid single-app bias
- At least 200,000 impressions, for reliable rate-based metrics like TTR and CR
- At least 1,000 downloads, so conversion funnel data is meaningful
- At least \$10,000 annual spend per app, to exclude test campaigns and low-commitment advertisers that would skew CPAs.

Segmentation

The report breaks down performance by country, category, and Custom Product Page usage (vs. default).

We measure tailored paywall uplift within the same apps, comparing users who saw default paywalls against users who saw paywalls matched to keyword intent.

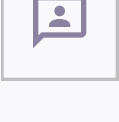
Regions

Country coverage spans 90 markets across North America, Europe, LATAM, MEA, and APAC.

Categories

The report uses 59 subcategory-level App Store categories instead of Apple’s default category structure, allowing for more precise insights.

- **Productivity:** AI (not tied to a single vertical), AI Chatbot, Generative AI, Notes, Office Suite, PDF Reader, Productivity, Time Planner
- **Photo & Video:** AI Art Generator, Photo & Video, Photo & Video: Other, Photo Editor, Screen Recorder, Video Editor, Video Players
- **Utilities:** Document Scanner, Recorder, Remote Control, Tools, Tools: Other, Translator, VPN
- **Education:** Driver License, Education, Education: Other, Exam Preparation, Study
- **Entertainment:** Apps for Games, Entertainment, Entertainment: Other, Personalization, Stickers/GIFs/Smileys/Emoji
- **Health & Fitness:** Calorie & Weight Tracker, Fitness & Workouts, Health & Fitness, Health Tracker, Yoga
- **Lifestyle:** Auto & Vehicles, Home & Garden, Horoscope & Astrology, Lifestyle, Religion

- **Music:** AI Music Generator, Audio/Music Editor, Music Apps, Music Apps: Other
- **Navigation:** GPS Search & Tracking, Navigation, Navigation: Other
- **Books:** Audiobooks & Ebooks, Books & Reference
- **Graphics & Design:** Graphics & Design, Poster & Card Maker
- **Social Networking:** Social, Social Account Stats
- **Travel:** Flight Tracking, Travel
- **Weather**

Glossary

TTR

tap-through rate. The percentage of impressions (times the ad is shown) that become taps.

CPT

cost per tap. What an advertiser pays when a user taps their ad in the App Store search results.

CR

conversion rate. The percentage of taps that become downloads, measured on the App Store product page.

Downloads (Total)

total number of tap-through and view-through new downloads and re-downloads from an ad within the reporting period.

Installs (Total)

total number of users who have installed the app for the first time, as well as any reinstalls by existing users. This includes multiple installations by the same user on different devices.

CPA

cost per acquisition. Spend divided by downloads. The headline cost metric in Apple Ads Manager.

Install → Trial

the percentage of users from total downloads that start a free trial. Measured inside the app. Shown as "Trial CR" in the Adapty's Apple Ads Manager dashboard.

Trial → Paid

the percentage of trial users who convert to a paid subscription.

ROAS

return on ad spend. Revenue earned divided by ad spend. ROAS above 1.0× means the campaign is profitable on a cash basis.

Ad Group

a subset of an Apple Ads campaign with its own max CPT bid and audience settings.

Custom Product Page (CPP)

a variant of an App Store product page tailored to a specific keyword intent. Apple allows up to 35 variants per app.



Apple Ads converts 2x better than other paid channels

Users coming from Apple Ads start trials at 3.66% vs 1.45%, and convert to paid at 1.92% vs 0.91%. Same installs, but different economics.

The bigger lesson is what to do with that advantage. **CPA varies 14x across countries. LTV varies 2.7x.** The countries where ROAS opportunities live aren't always the obvious ones.

Brazil delivers 65 paying subscribers per \$1,000 of Apple Ads spend. The US delivers 15. That's where the CPA-LTV math lives.

Two product findings worth flagging:

- Matching custom product pages to intent **lifts downloads by 23%.**
- Tailoring paywalls to traffic source **lifts paying users by 76%.**

Most Apple Ads budgets pour into the markets with the most users, not the markets with the cheapest subscribers. The data points to a different allocation.



Mykola Martynovets

Apple Ads Manager Lead, Adapty

Apple Ads subscriber economics



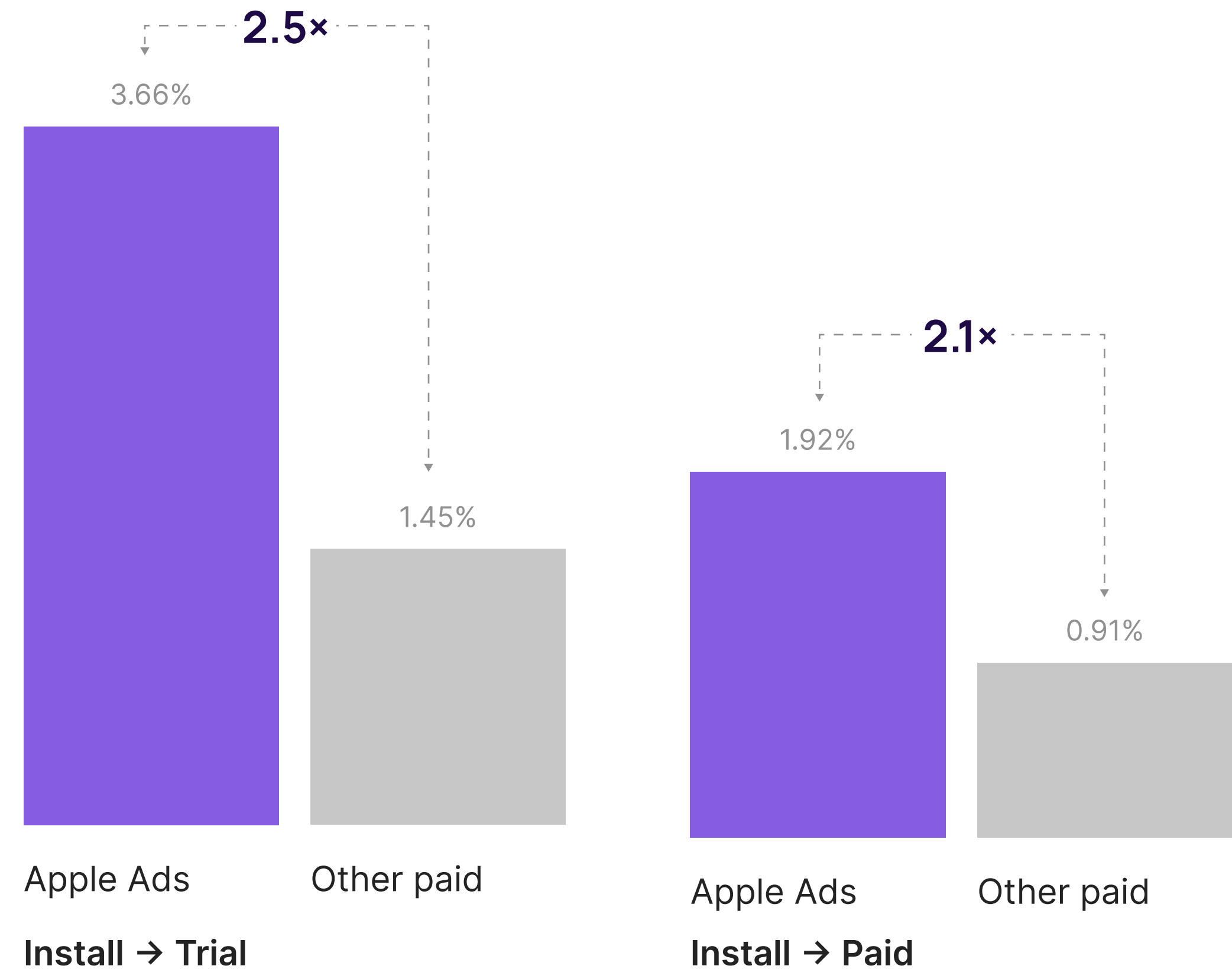
Apple Ads converts 2x better than other paid channels

Users coming from Apple Ads start trials at **3.66%**. Users coming from other paid channels start trials at **1.45%**.

The net result is a 2.1x advantage on the full funnel (from install to paid): **1.92%** for Apple Ads vs **0.91%** for other paid.

Users tap Apple Ads because they searched for something. Users tap other paid ads because they interrupted their scroll. This behavioral difference shows up clearly at trial start.

Apple Ads vs other paid channels: install-to-trial and install-to-paid



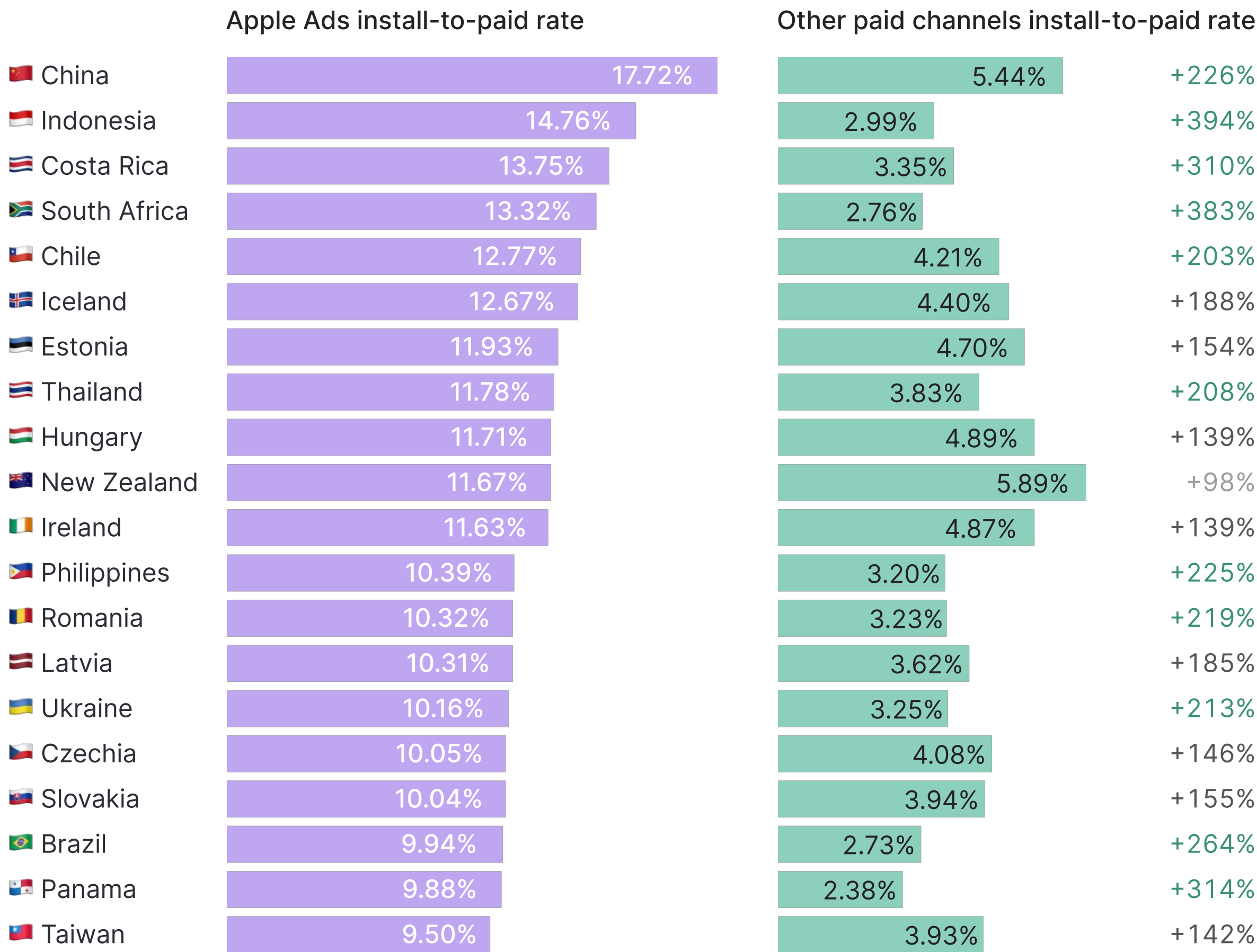
Apple Ads converts 5x better than other paid channels in Indonesia and South Africa

The advantage is biggest in emerging markets. The top 5: **Indonesia, South Africa, Panama, Costa Rica, Brazil** — all show Apple Ads outperforming other paid.

In high-tier markets like the US, Norway, Iceland, and Denmark, the lift collapses to single digits. The auction in those markets has been bid up enough that Apple Ads' premium has compressed.

The opposite is true where bids are still cheap. Apple Ads keeps its edge, sometimes by 3-4x.

Top 20 countries by Apple Ads install-to-paid rate, with other paid channels comparison

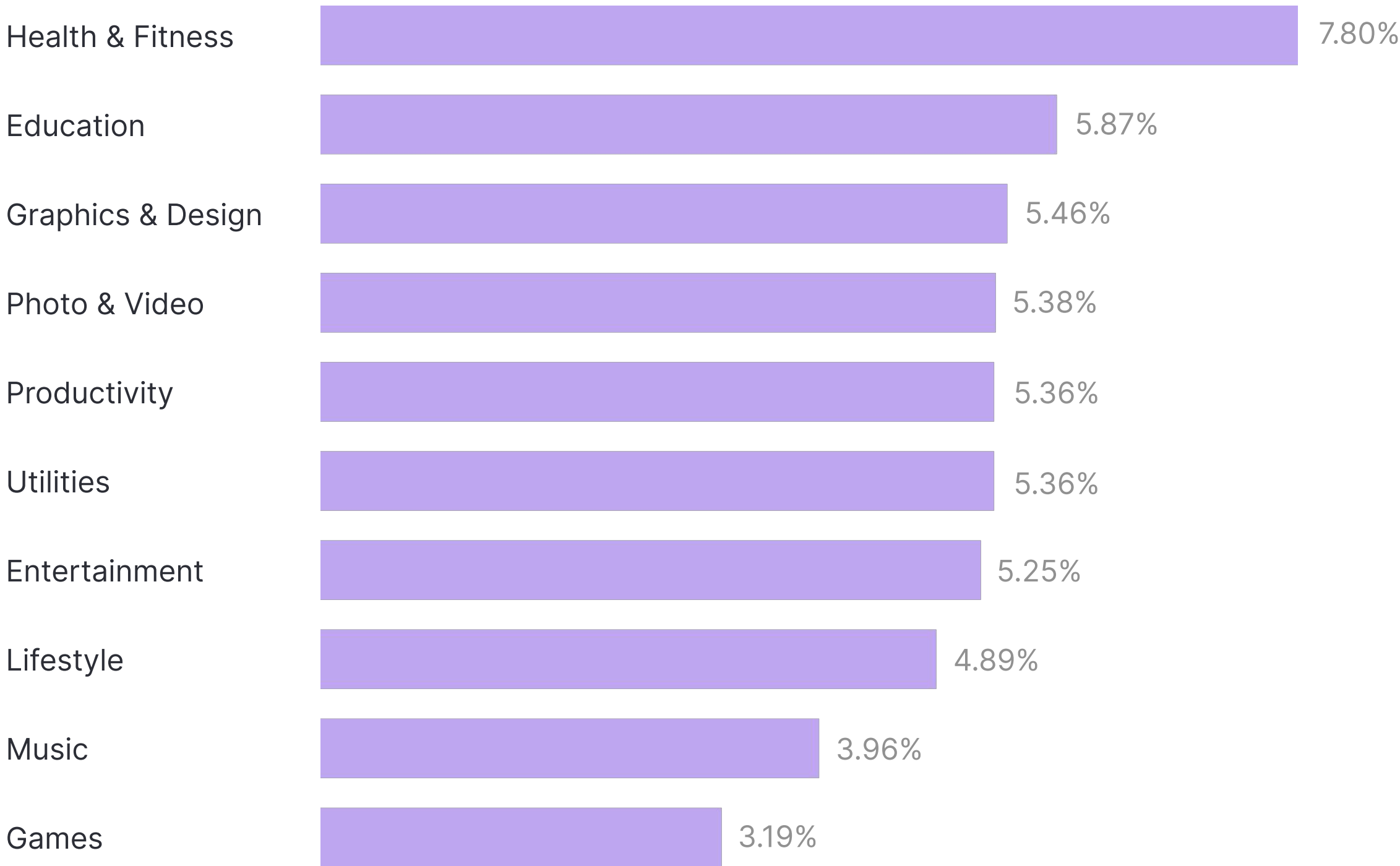


Health & Fitness leads US Apple Ads at 7.80% install-to-paid

Education follows at **5.87%**, Graphics & Design at **5.46%**. The top 7 categories all sit between **5%** and **8%**.

Users tap Health & Fitness, Education, and Productivity with a specific outcome in mind. They tap Music and Games to fill time. The funnel rewards intent.

Top 10 US categories by Apple Ads install-to-paid rate



Methodology: US data only. Apps sized 100,000-500,000 installs globally. Median install-to-paid rate per category.

Israel, Norway, Qatar deliver the highest LTV from Apple Ads

Guatemala, Costa Rica, and Croatia all clear \$50. Emerging markets are not synonymous with low LTV. Several Tier 2-3 countries deliver per-user economics that rival US spend.

The US sits at \$48, 15th on the list. Acquisition budgets pour into a mid-pack LTV market because the audience is large, not because the per-user economics are best.

CPA varies 14× by country, LTV varies 2.7×. Cheap markets with normal LTV are where the ROAS opportunities live.

Top 20 countries by Apple Ads year-1 LTV

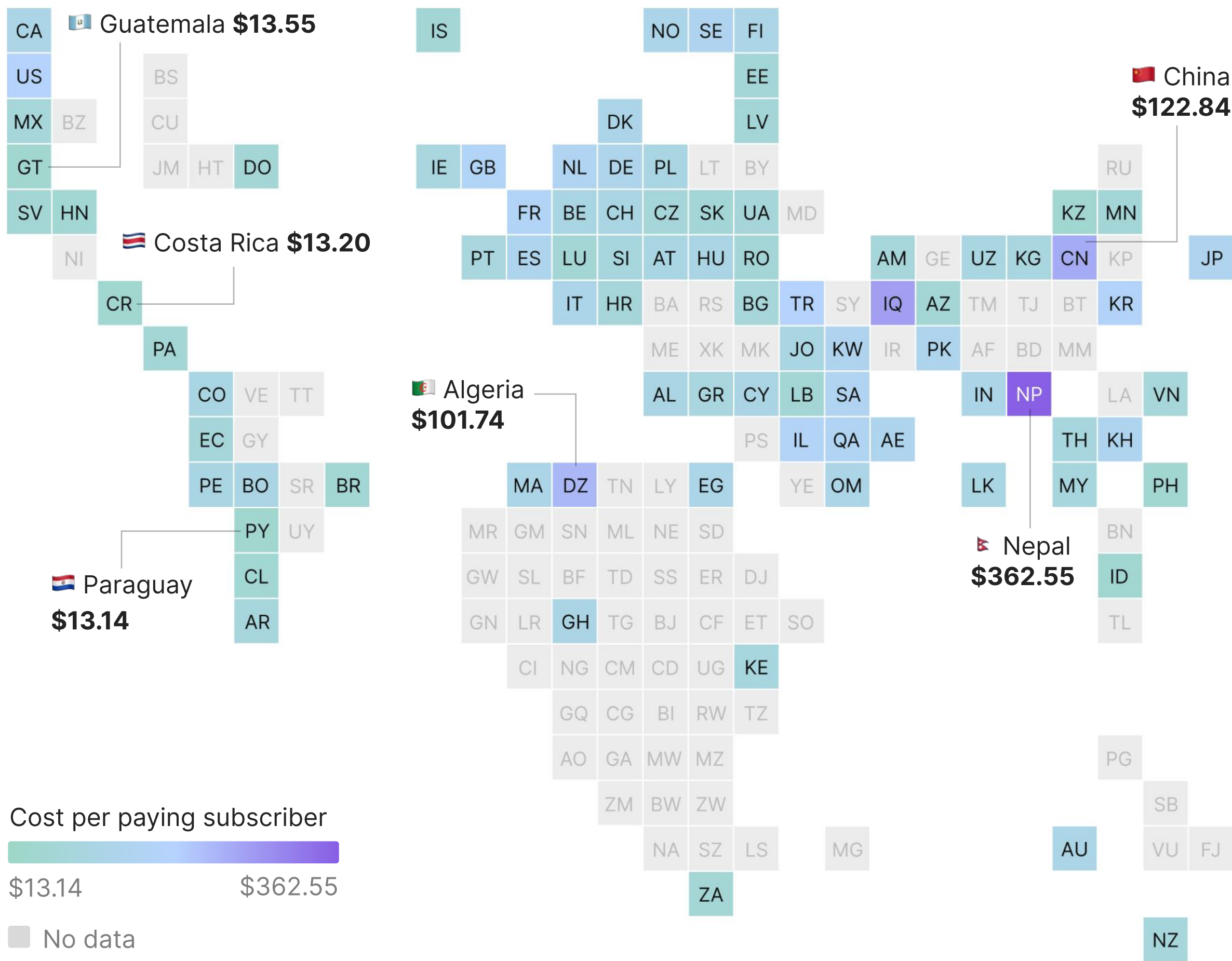


The cheapest cost per subscriber clusters in Latin America and Eastern Europe

The 24 cheapest markets cost under \$20 per paying subscriber, with **Guatemala**, **Costa Rica**, and **Paraguay** under \$14.

Brazil at \$15.36 pays back for any app with \$20 LTV. **Nepal** at \$362.55 pays back for almost none.

Apple Ads cost per paying subscriber, by country



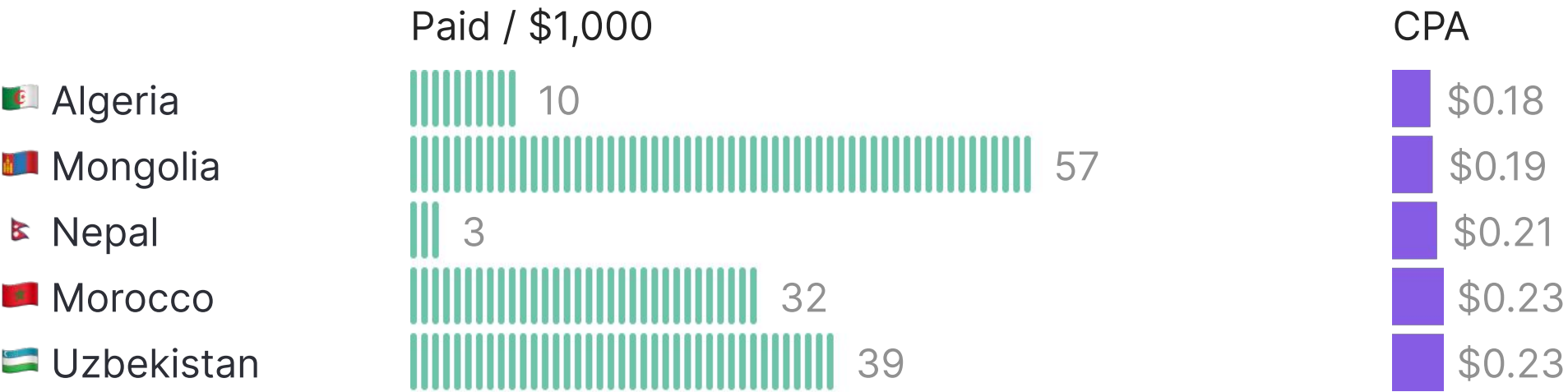
The most efficient markets are Tier 2-3

Five Tier 2-3 markets deliver 65-76 paying subscribers per \$1,000. **Paraguay, Costa Rica, Guatemala, Indonesia, and Brazil.**

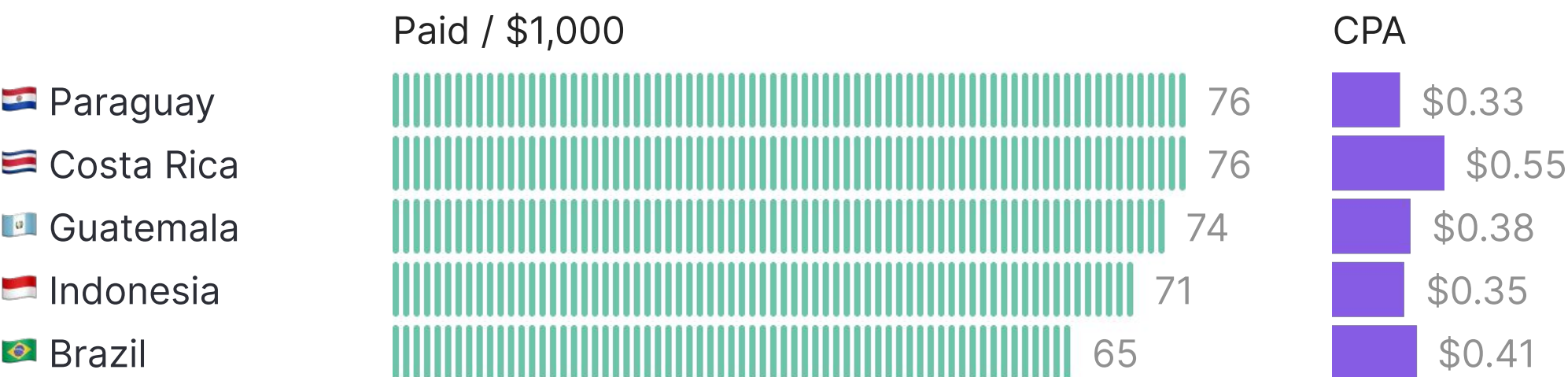
Expensive markets aren't the worst, but they're not the best. The US produces 15 paying subscribers per \$1,000. The UK produces 19. Both fall well short of Brazil's 65.

Paying subscribers per \$1,000 of Apple Ads spend

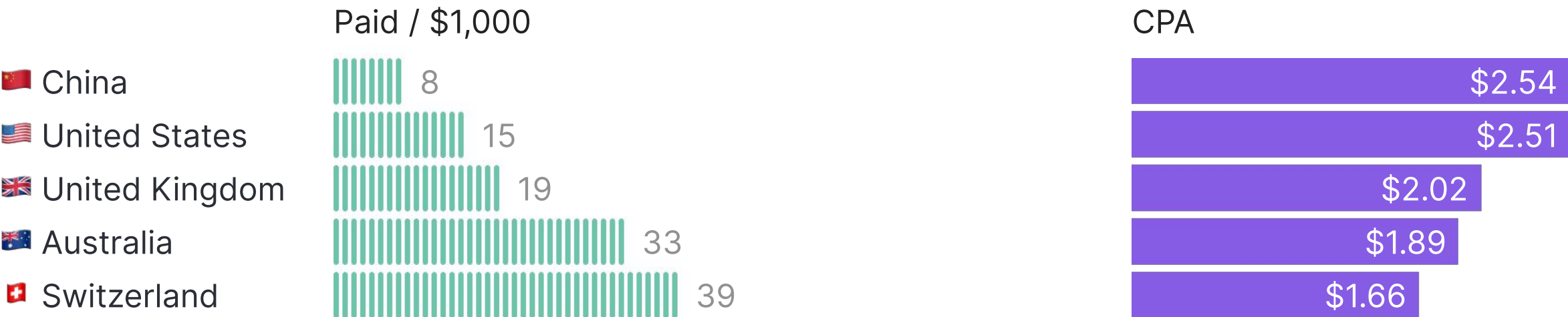
Cheapest downloads



Most efficient markets



Most expensive downloads





Lower LTV is consistently offset by even lower acquisition costs

With Apple Ads, I now focus mostly on Tier 2-3 countries, from Eastern Europe to South America. These markets offer high-volume, high-efficiency traffic that most developers overlook.

The concern is that non-US geos may not deliver comparable LTV. But lower LTV is consistently offset by even lower acquisition costs. At the end of the day, the only thing you need is ROAS above 100% – and ad campaigns targeting non-US markets are perfectly suited for that.

It's important to create a separate campaign for each country – this will help you improve ad efficiency. I run dedicated campaigns even for small countries with populations under 5 million. These campaigns perform consistently well.



Ivan Sparrow

App Founder & Marketer

Find underserved markets and prove they're worth it

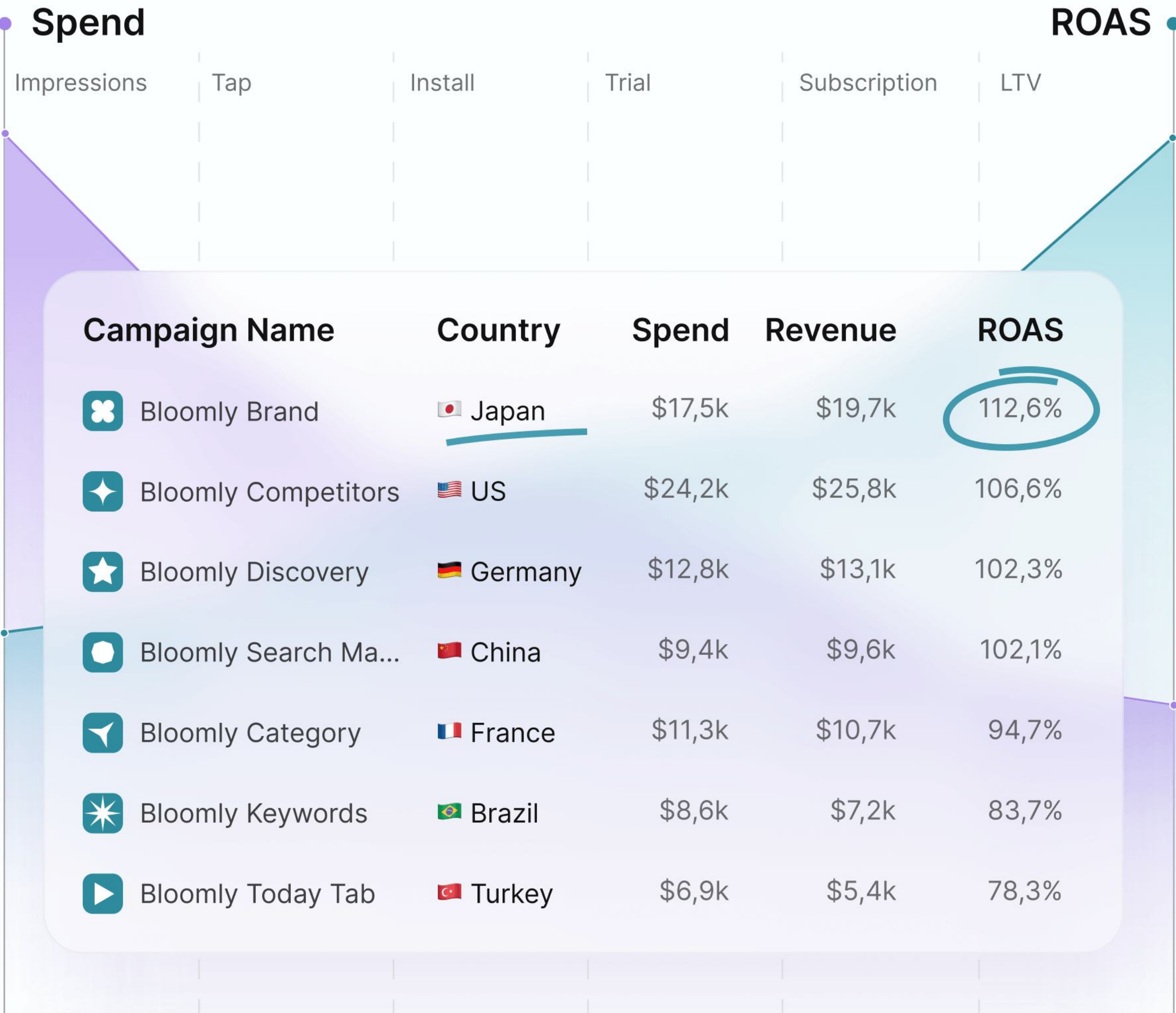
Track ROAS by country, keyword, and ad group. See whether Brazil's \$0.41 download pays back as well as the US's \$2.51.

Spot the markets worth entering with Market Intelligence. Find which keywords competitors bid on in countries you haven't entered yet.

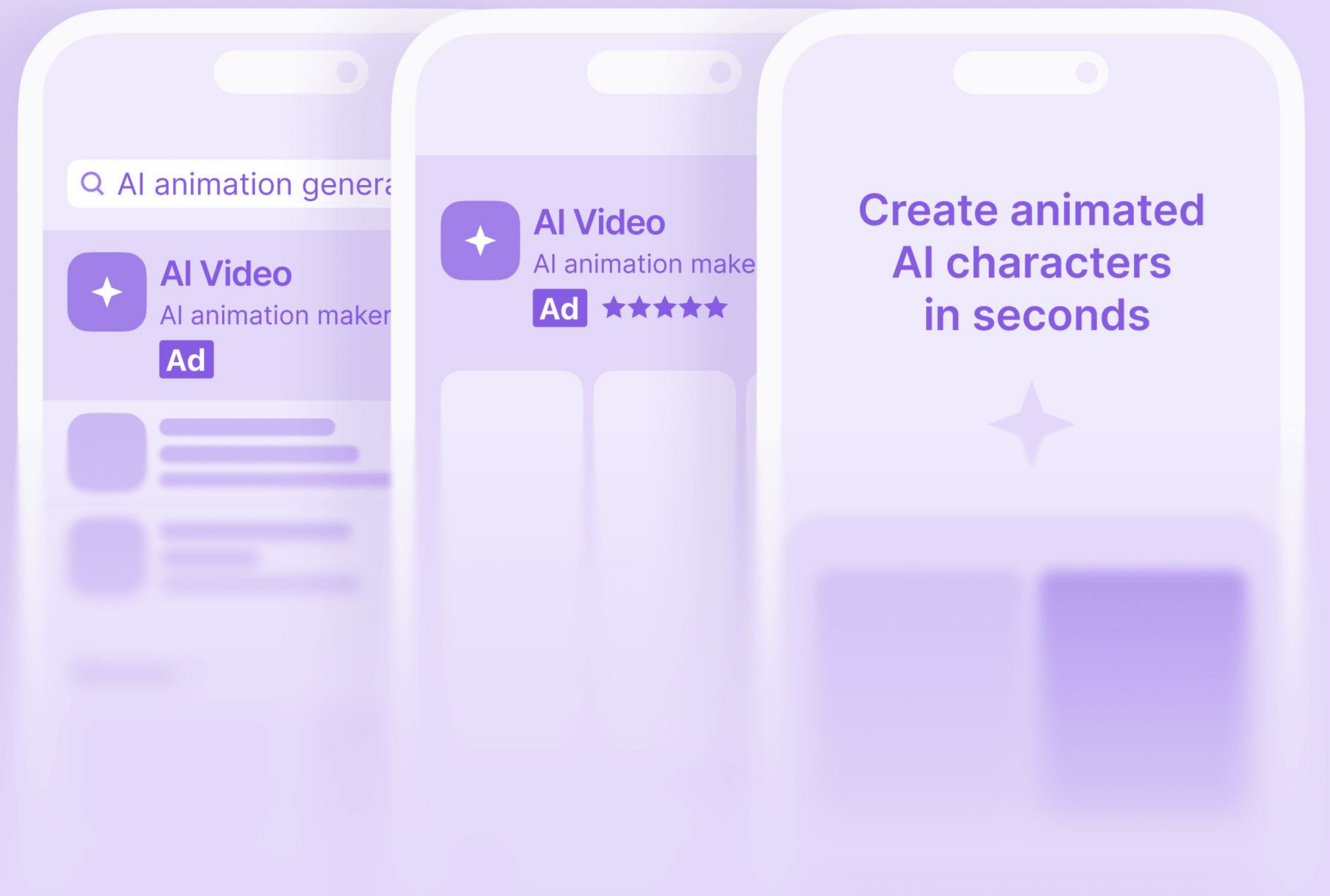
Scale what works, automatically. Set ROAS targets per country and let Adapty automate bids toward them.

Manage every market from one dashboard — campaigns, ad groups, and bids across countries, all in one place.

Learn more >



Paywalls matched to Apple Ads keywords



Tailored paywalls lift install-to-trial conversion by 41% and trial-to-paid by 24%

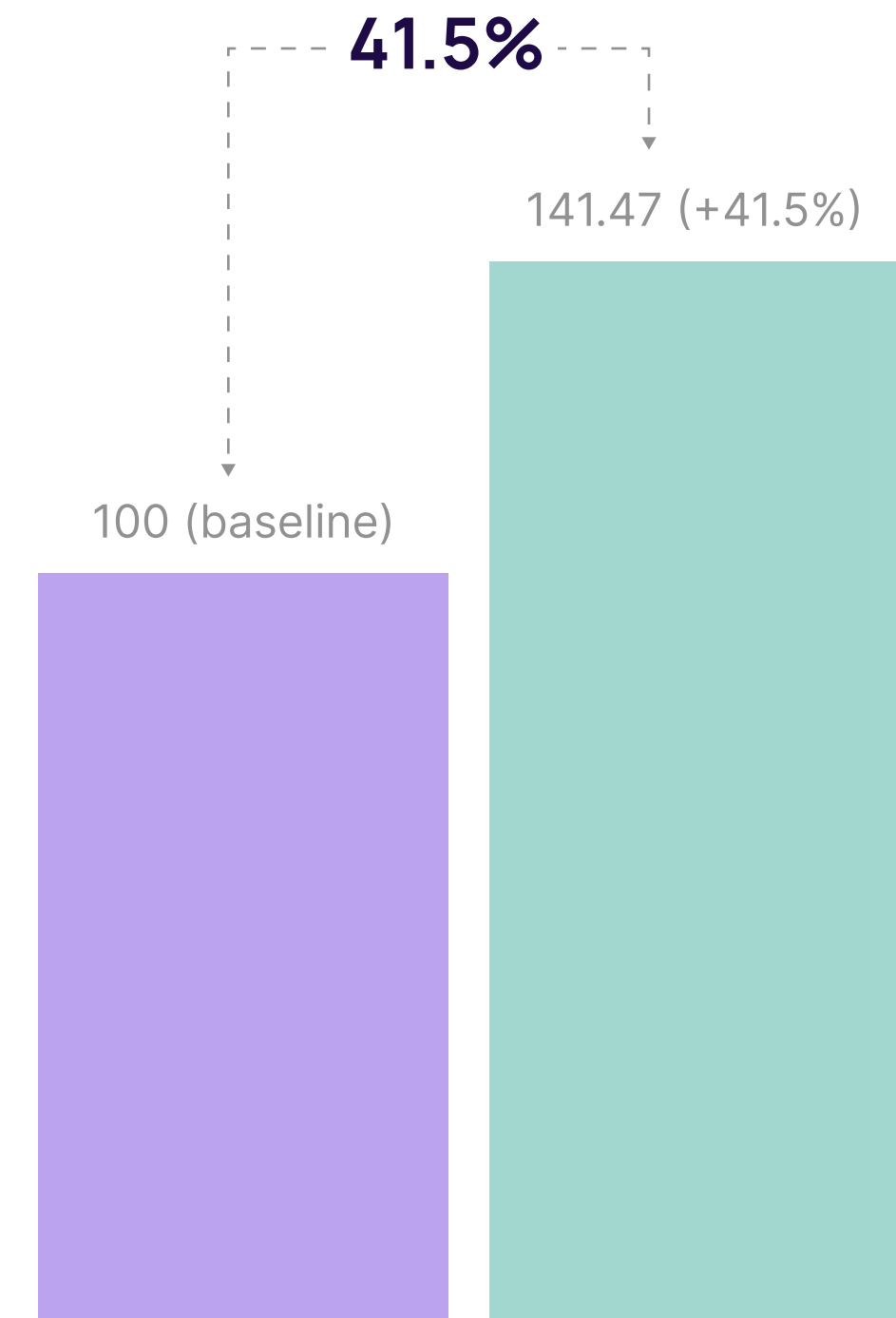
Two conversion lifts happen at different stages:

- The **41% install-to-trial** lift comes from matching the paywall to the user's search intent.
- The **24% trial to paid** lift comes from the in-app experience matching paywall promise.

These gains compound. 100 installs that produce 1 paying user on a default paywall produce 1.76 paying users on a tailored paywall.

Custom Product Pages shape the App Store experience before install. Tailored paywalls shape the in-app experience after.

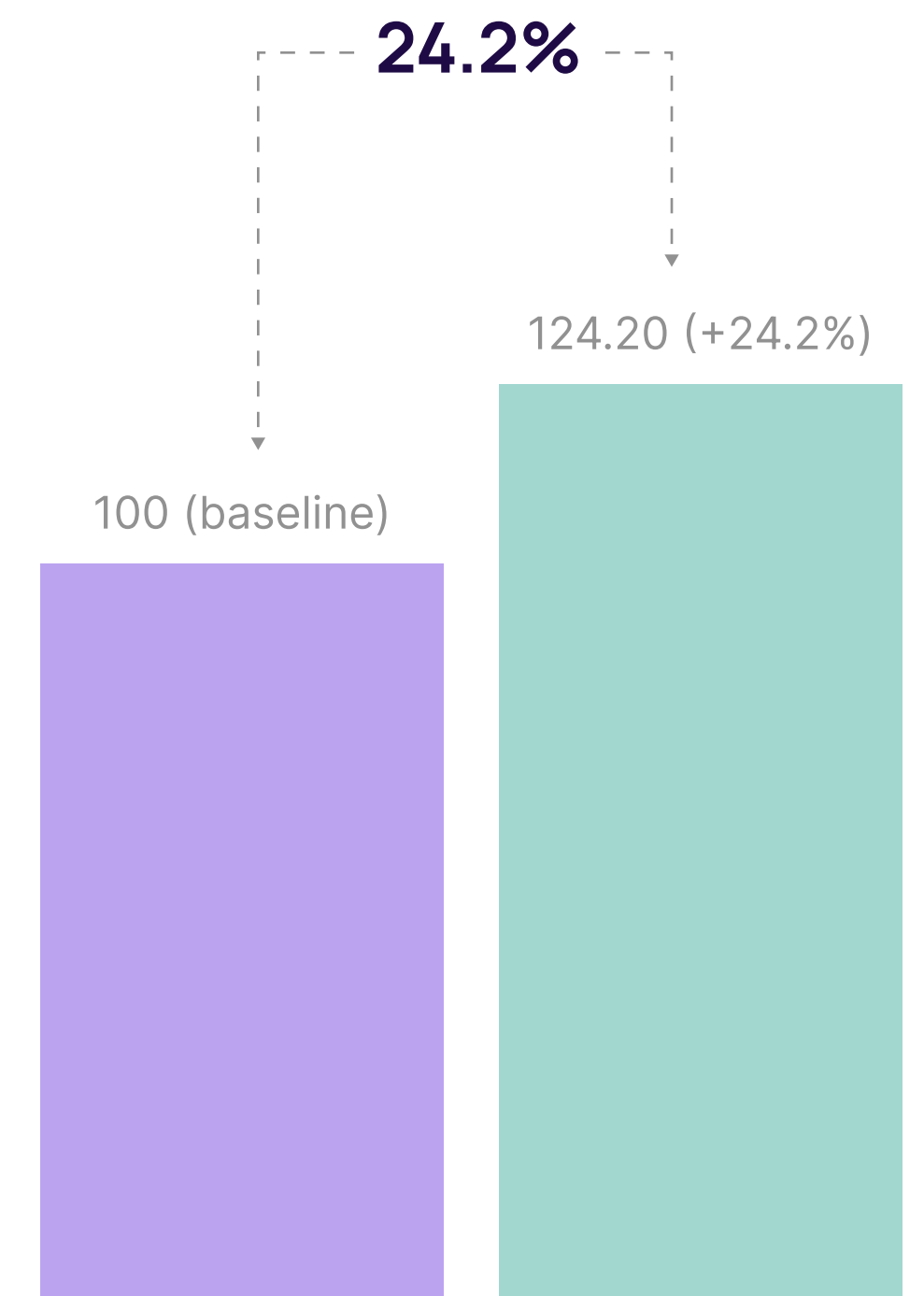
Tailored paywall uplift at two funnel stages



Default paywall Tailored paywall

Install → Trial

Share of installs that start a free trial within the same app



Default paywall Tailored paywall

Trial → Paid

Share of trial users who convert to a paid subscription

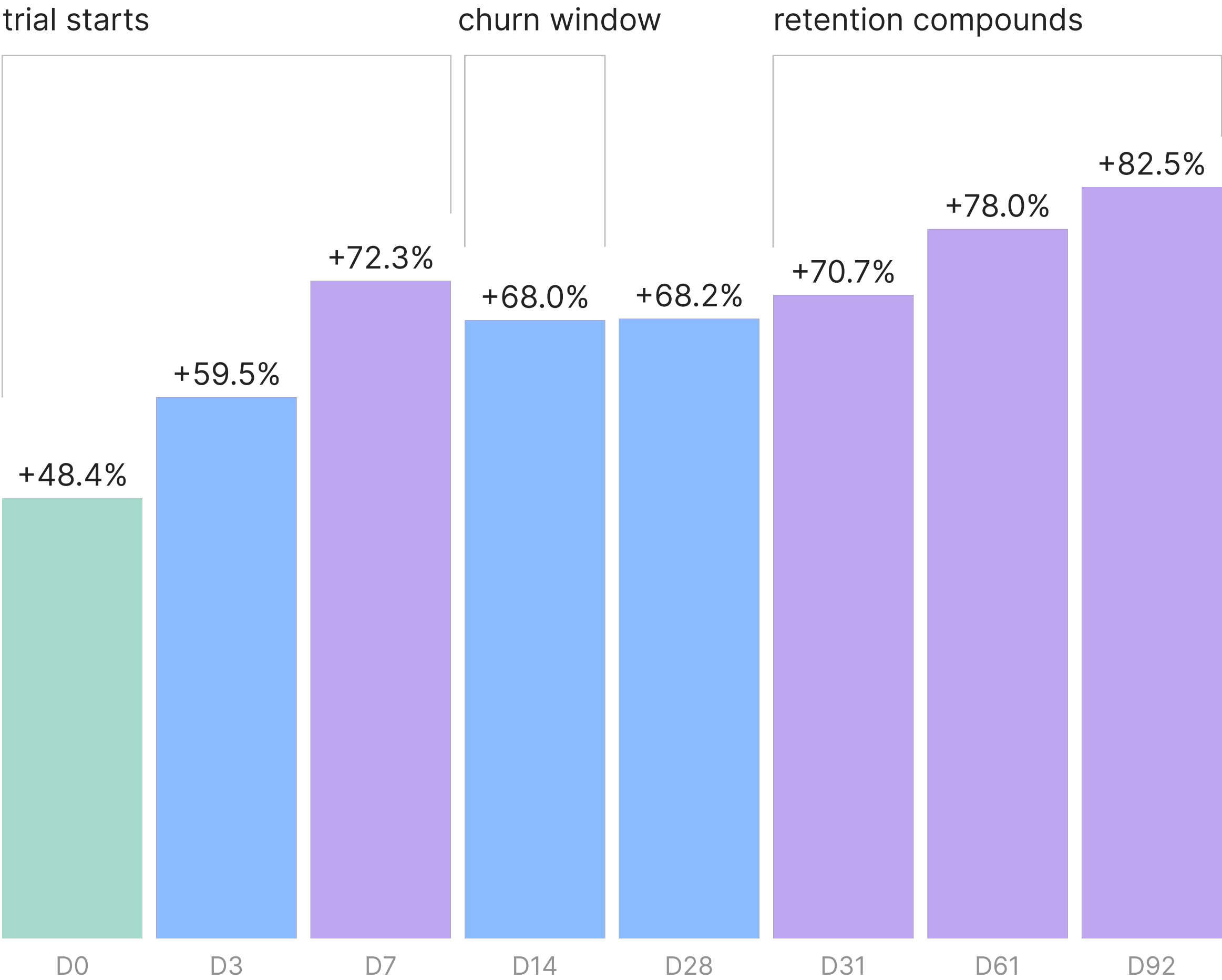
Day 0: tailored paywalls lift ROAS by 48%. By Day 92, the uplift reaches 82%

Tailored paywalls convert more users immediately through intent-matched paywalls. Over time, those users also retain at higher rates.

The middle period (D14–D31) stays relatively flat at +68–70%. Most apps stop measuring ROAS here, which underreports the long-term compounding effect.

Better-matched users stay subscribed longer, which is why ROAS keeps climbing after install.

Tailored paywall uplift at two funnel stages



Case study: 3x Apple Ads revenue with keyword-matched paywalls

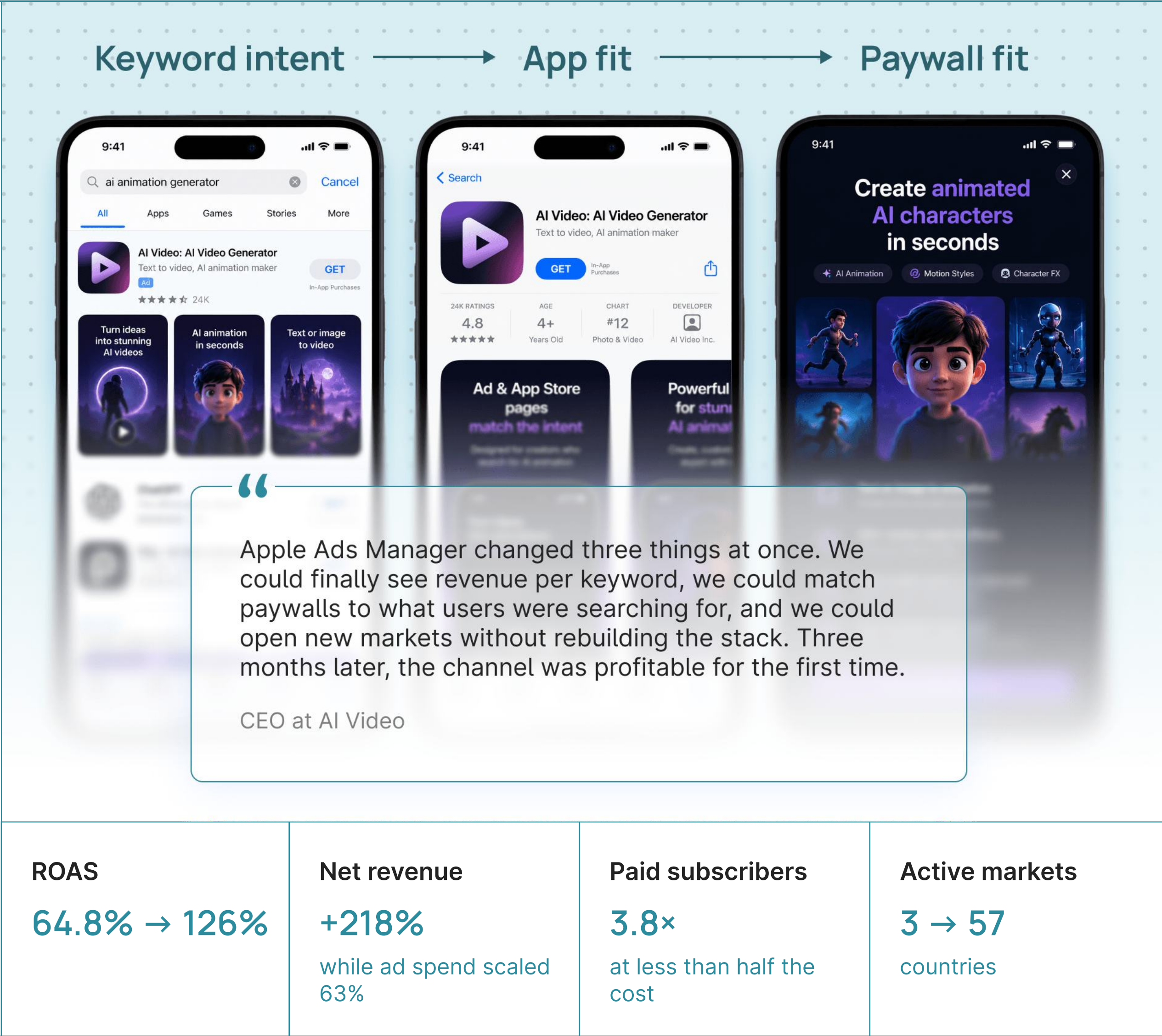
An AI Video app had an intent-matching problem.

Previously, every install hit the same paywall. A user searching “AI animation” saw the same screen as someone searching “AI photo editor.”

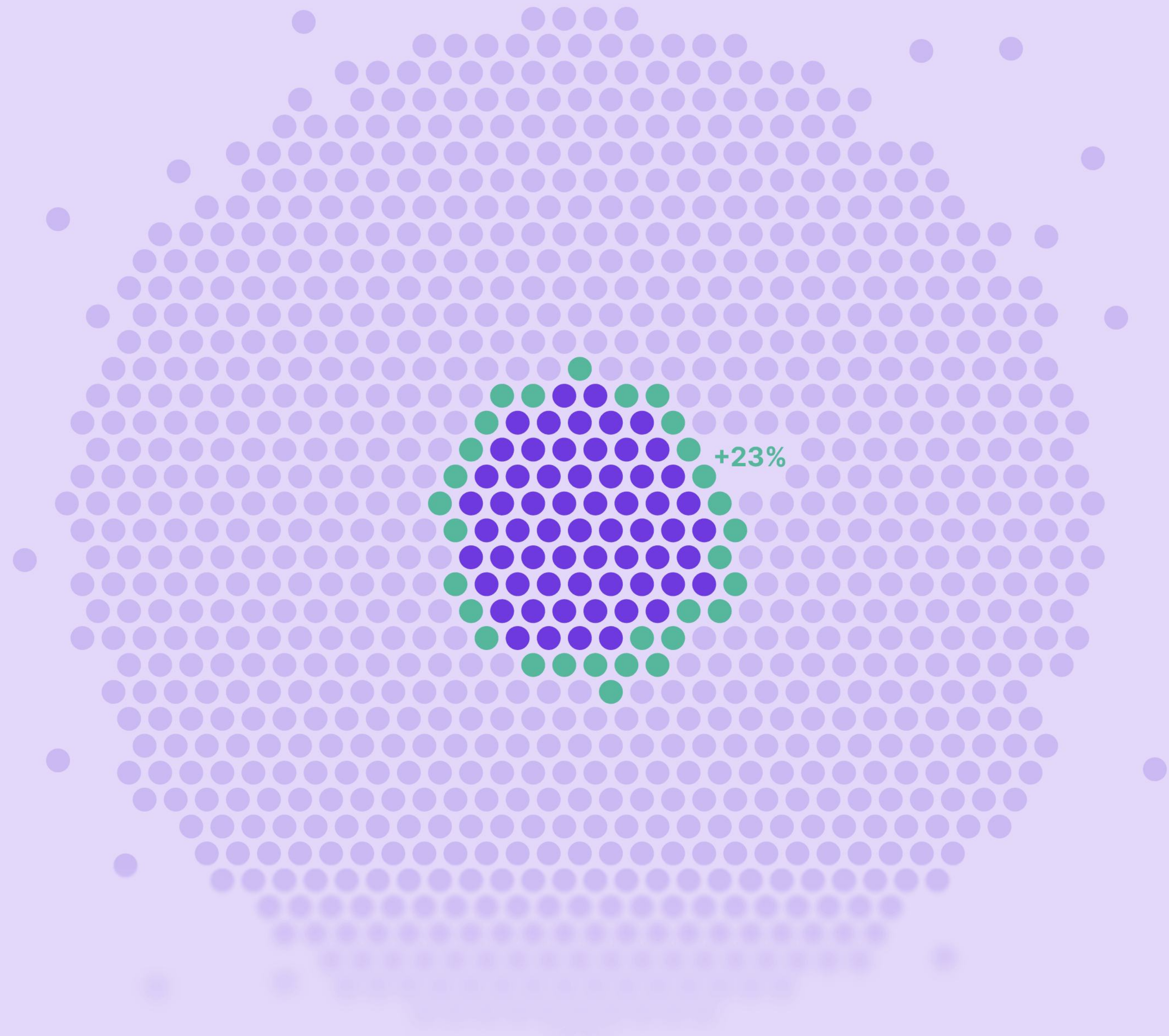
With Adapty, the team mapped Apple Ads keywords to 3-5 intent clusters, each with its own paywall.

The app saw the same pattern highlighted throughout this report: ROAS compounded over time. A channel that never broke even turned profitable in 60 days.

Read the full case study >



Custom Product Page performance



12% more taps and 10% more downloads when the product page matches the keyword

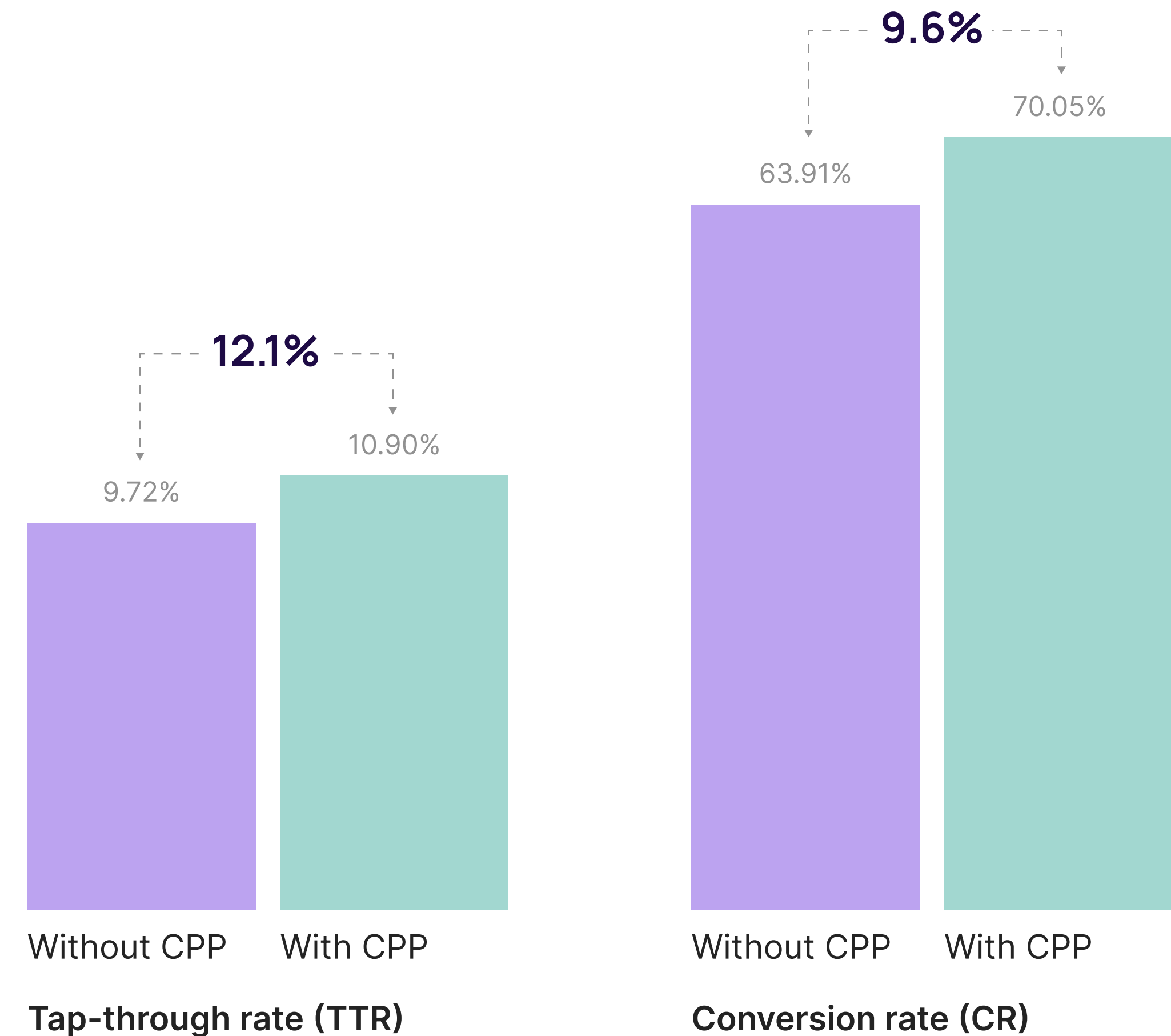
The lifts happen at different moments in the funnel:

- **The 12% TTR lift happens in the search results**, where a relevant page wins more taps from the same impressions.
- **The 9.6% CR lift happens after the tap**, where a matching page converts more users from the same traffic.

Baseline conversion rate is already 64%. Even in a high-intent channel like Apple Ads, CPP adds another 6.1% lift.

Ad group performance with and without Custom Product Pages

Measured at the App Store search result

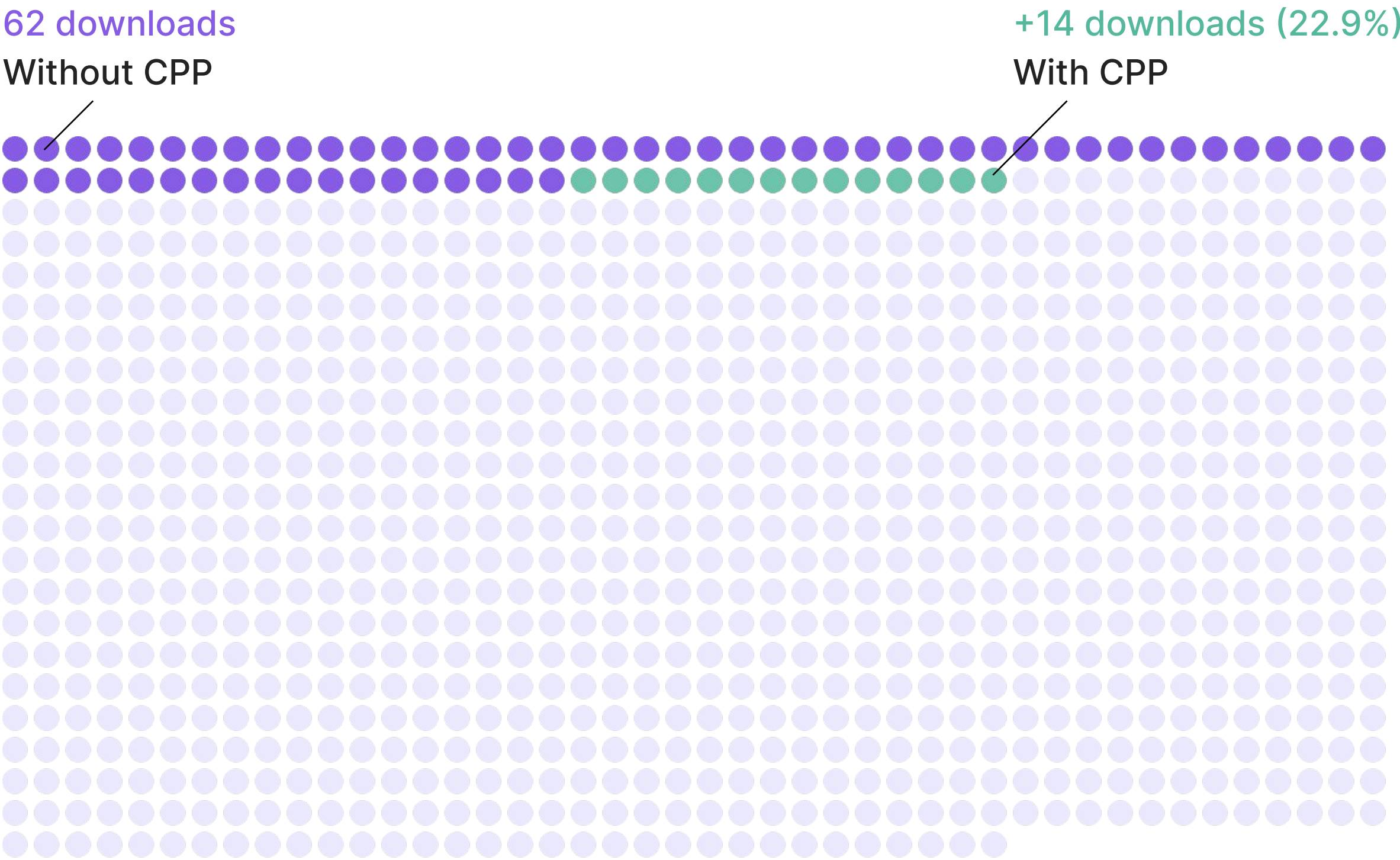


Pre- and post-tap uplifts compound into 23% more downloads

Before the tap, a keyword-matched page earns the user’s attention. After the tap, the same match reinforces that they made the right choice. Generic pages break both moments, creating the 12% TTR gap and 10% CR gap.

At baseline rates, 100 impressions produce 6.21 downloads without CPP and 7.63 with CPP. That translates to nearly 14 additional downloads per 1,000 impressions by matching the page to the keyword.

Downloads per 1,000 impressions, with and without Custom Product Pages



Pre-tap		Post-tap		Compounded
+12.1%	×	+9.6%	=	+22.9%
TTR uplift		CR uplift		downloads per impression



It's incredibly easy to celebrate a top-of-funnel win while ignoring a downstream disaster

I remember running our first major set of Apple Custom Product Pages to optimize Apple Ads. Initial tests looked like an absolute home run. A 20% lift in Conversion Rate — a huge efficiency boost to our spend.

The patting ourselves on the back lasted about a week, until we reviewed the downstream metrics. The same test was driving a 20% decrease in trials.

We had done all this work to create intent-based pages and improve the customer journey, but the in-app experience didn't match. Users were still getting a one-size-fits-all paywall. The expectation didn't match reality.

We fixed it, made sure the in-app experience matched the pre-install, and watched trial starts go up.

The macro data proves what I saw on the micro level: When you align the CPP and the tailored paywall, 100 installs go from producing 1 paying user to 1.76. Better-matched users also stay subscribed longer — ROAS climbs 48% on Day 0 and 82% by Day 92.

Stop stopping at the install. If you're building CPPs without tailoring the in-app paywall to match, you're burning your ad spend at the door.



Nicole Weiss

Founder, Brass Finch

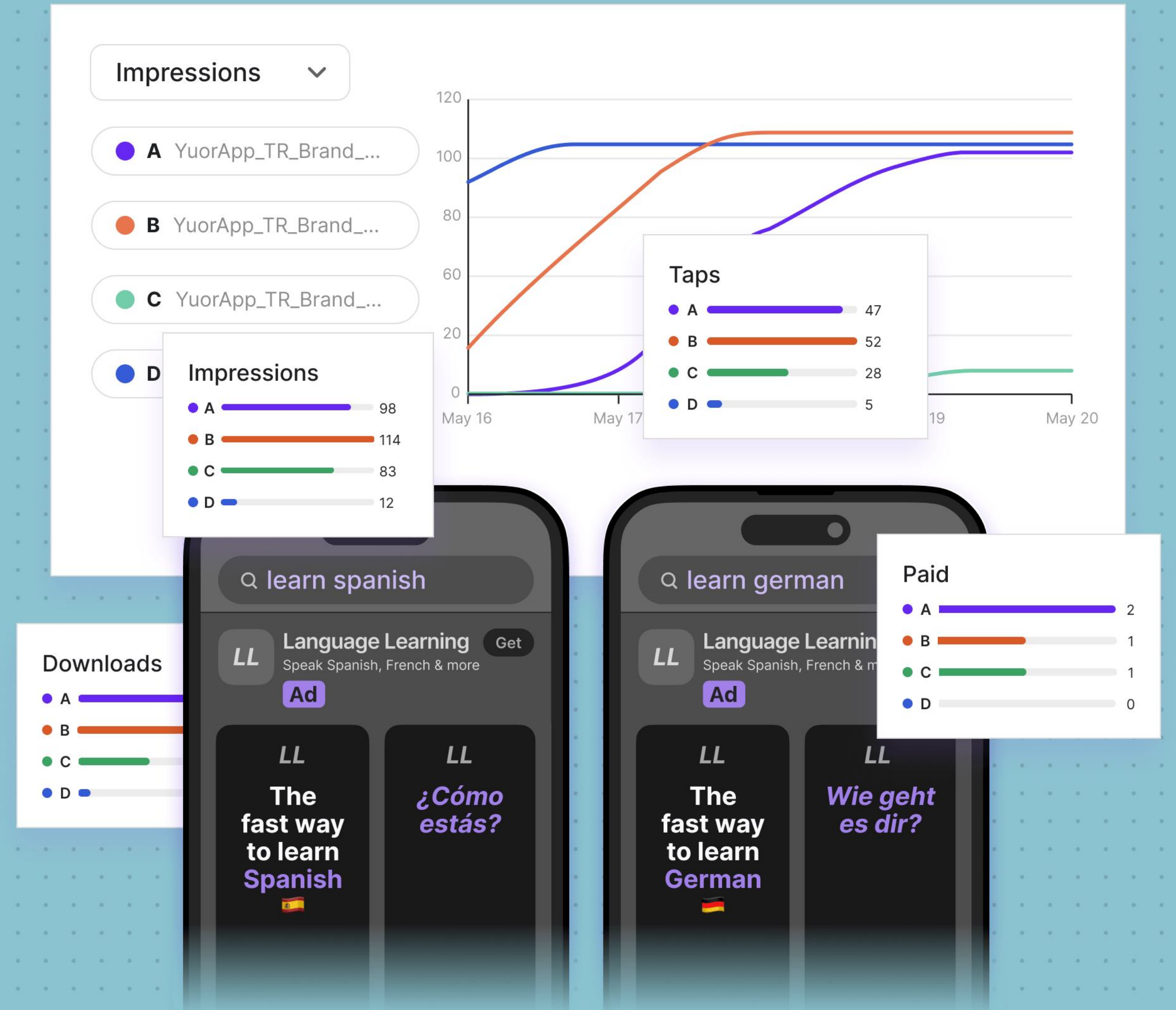
Test Custom Product Pages on ROAS, not just conversion rate

A/B test CPPs automatically. Split traffic, wait for 90% confidence, pick the winner.

Pick the page that drives revenue. A CPP converting at 55% can lose to one at 48% if the 48% page brings users who subscribe. We track both, and pick on revenue.

Match creative to keyword intent. Test different CPPs against keywords with different intent and see which one works.

Learn more >



Country-level benchmarks

AL	CY	LV	BG
RO	UA	EE	SI
SK	PT	HR	GR
PL	CZ	LU	ES
IT	HU	BE	FI
IS	SE	IE	DK
AT	NL	FR	DE
NO	CH	GB	

JP	CN		

MO	TW	KR	HK
JP	CN		

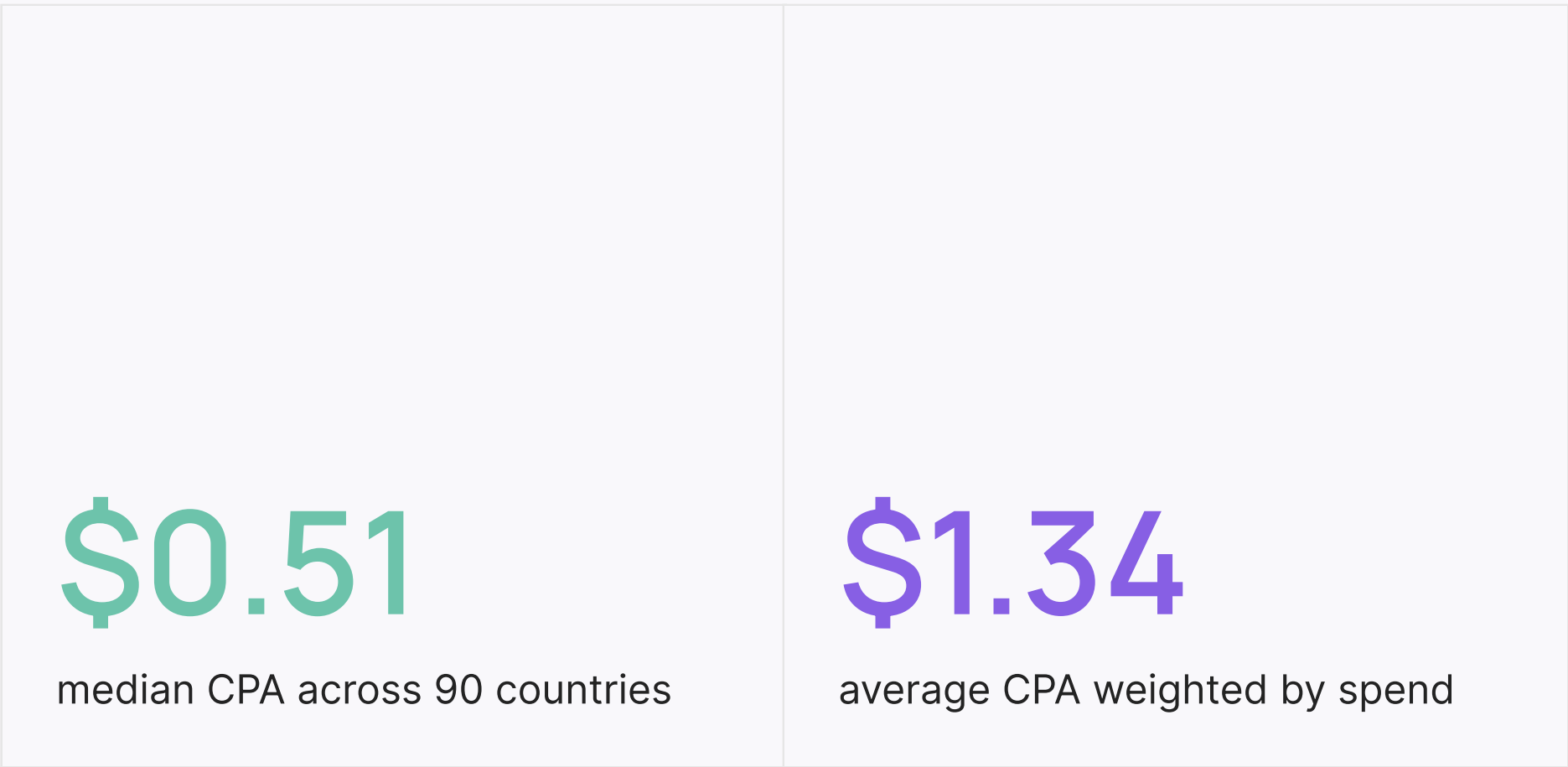
PY	BO	GT	HN
DO	PA	BR	SV
CO	EC	CR	PE
CL	AR	MX	CA
US			

NP	VN	IN	KH
PK	ID	PH	LK
MY	TH	SG	

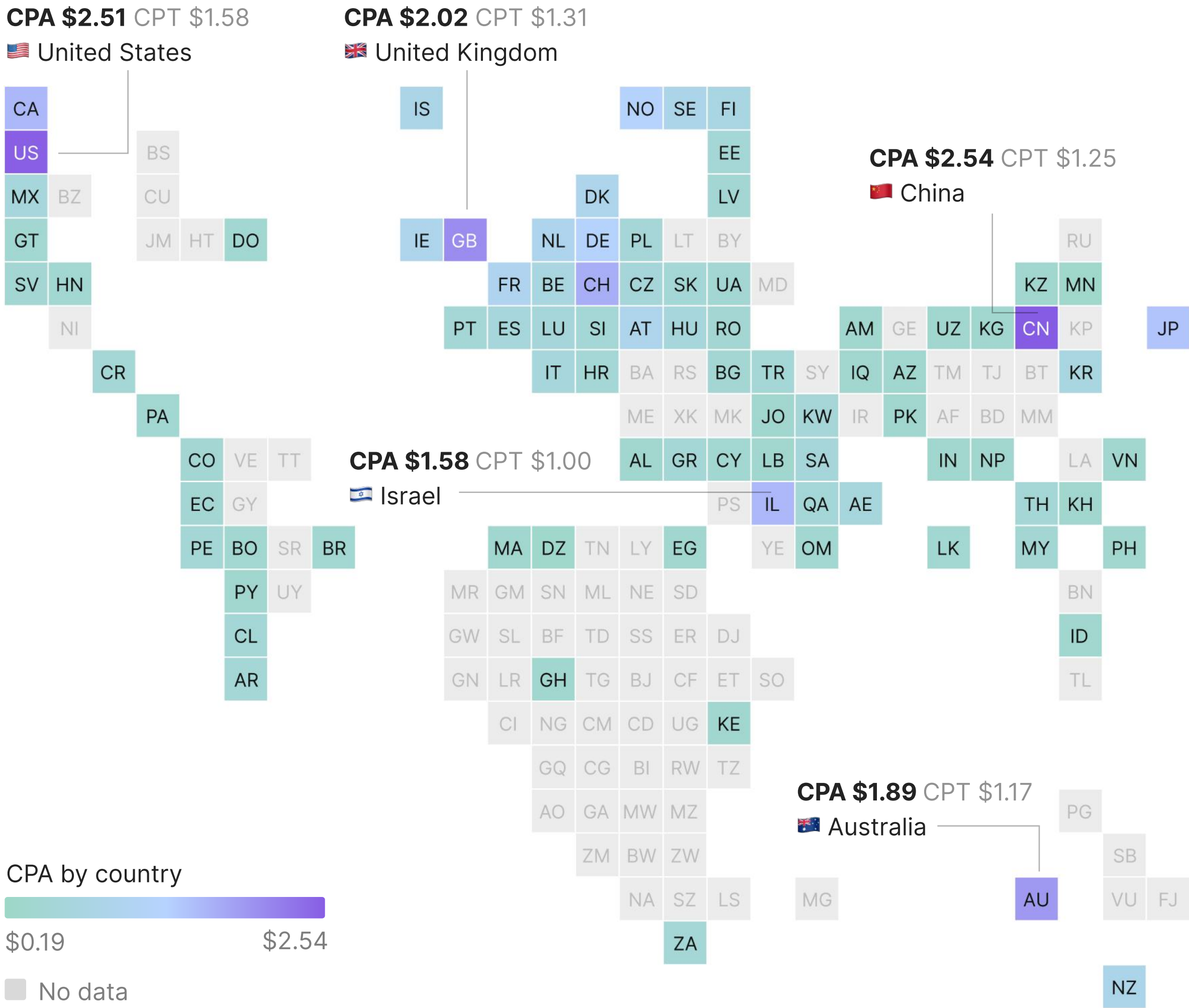
IQ	JO	AM	LB
AZ	BH	OM	TR
QA	KW	SA	AE
IL			

CPA is less than \$1.50 for 92% of countries. Most teams focus on the other 8%

The spend-weighted average CPA is 2.6× higher than the median.



Cost per acquisition (download) by country, full world view

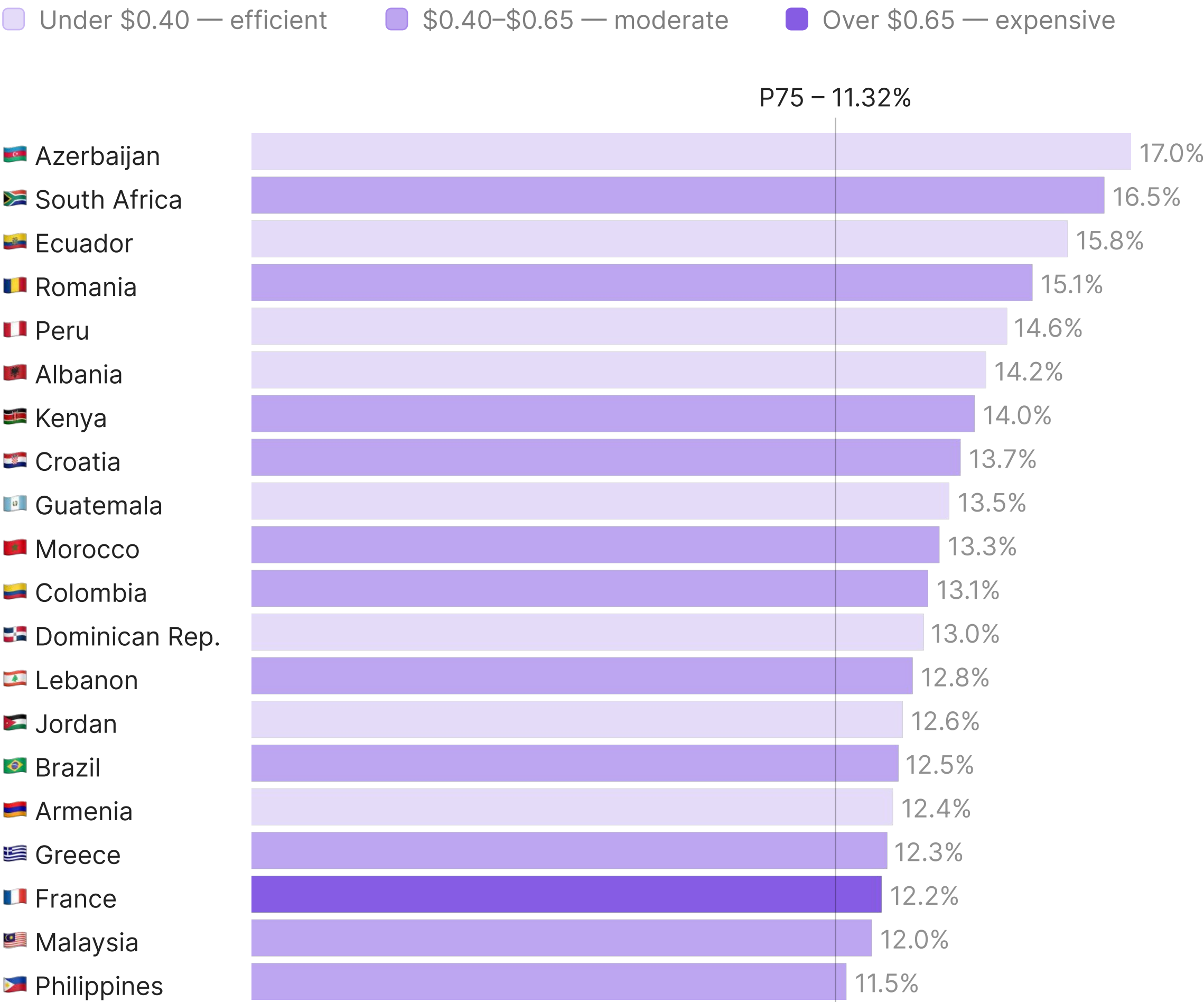


Low cost and high intent travel together, 19 of the top 20 TTR markets cost under \$0.65 per download

The world's highest-intent markets are almost all inexpensive to acquire. Of the top 20 by TTR, 19 cost under \$0.65 per download — most under \$0.40.

France is the exception: 12.2% TTR at \$1.11 CPT.

Top 20 countries by tap-through rate, with CPA tier overlay

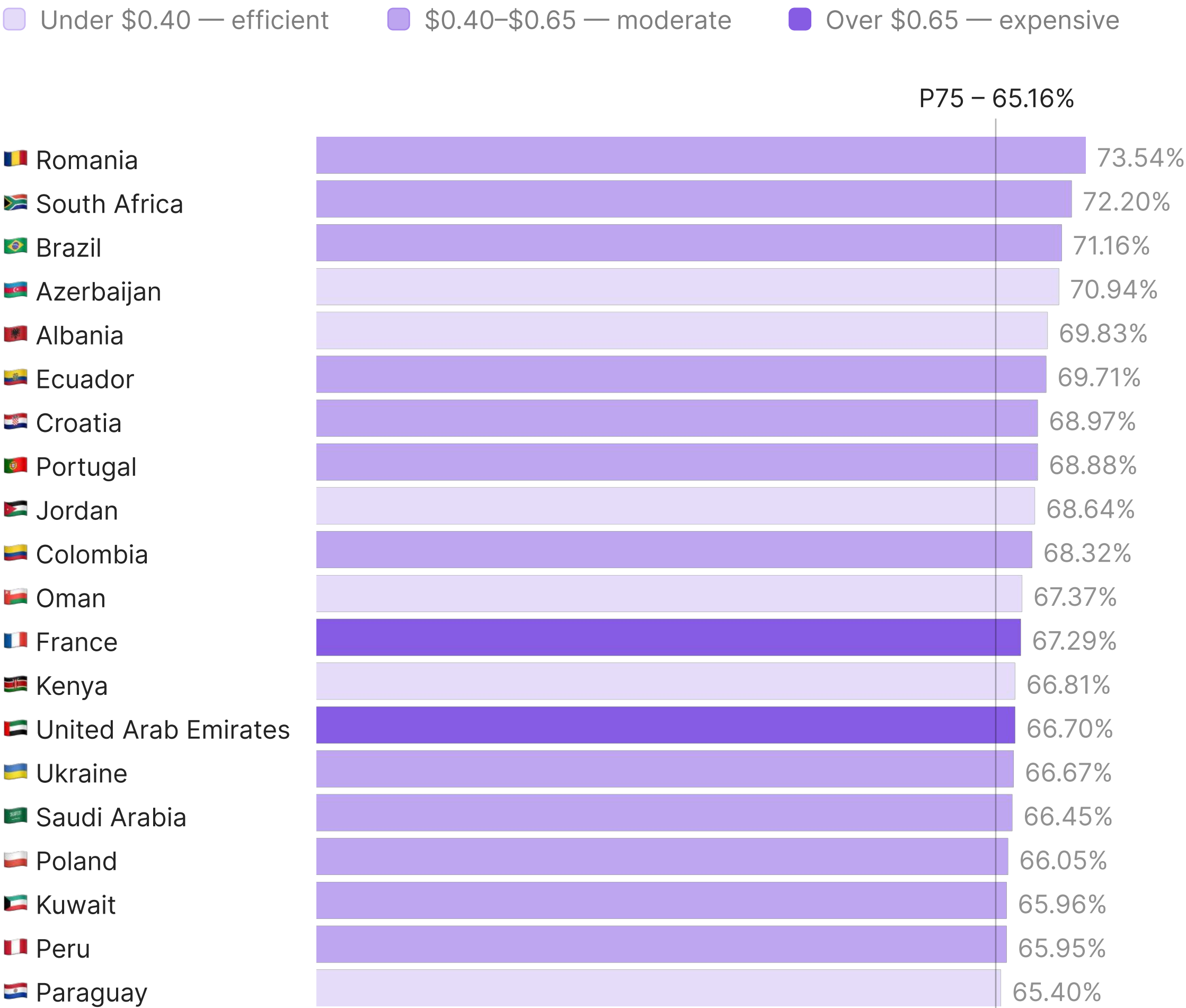


18 of the top 20 markets by conversion rate cost under \$0.65

France and the UAE are the markets most acquisition teams plan around. They're also the only two top-20 CR markets in the expensive tier — France at \$1.11 CPT, UAE at \$0.95.

Lower-cost markets with similar conversion rates sit right beside them on the list: Jordan, Azerbaijan, Albania, Kenya, and Paraguay. Similar conversion rates, a quarter of the cost.

Top 20 countries by conversion rate, with CPA tier overlay

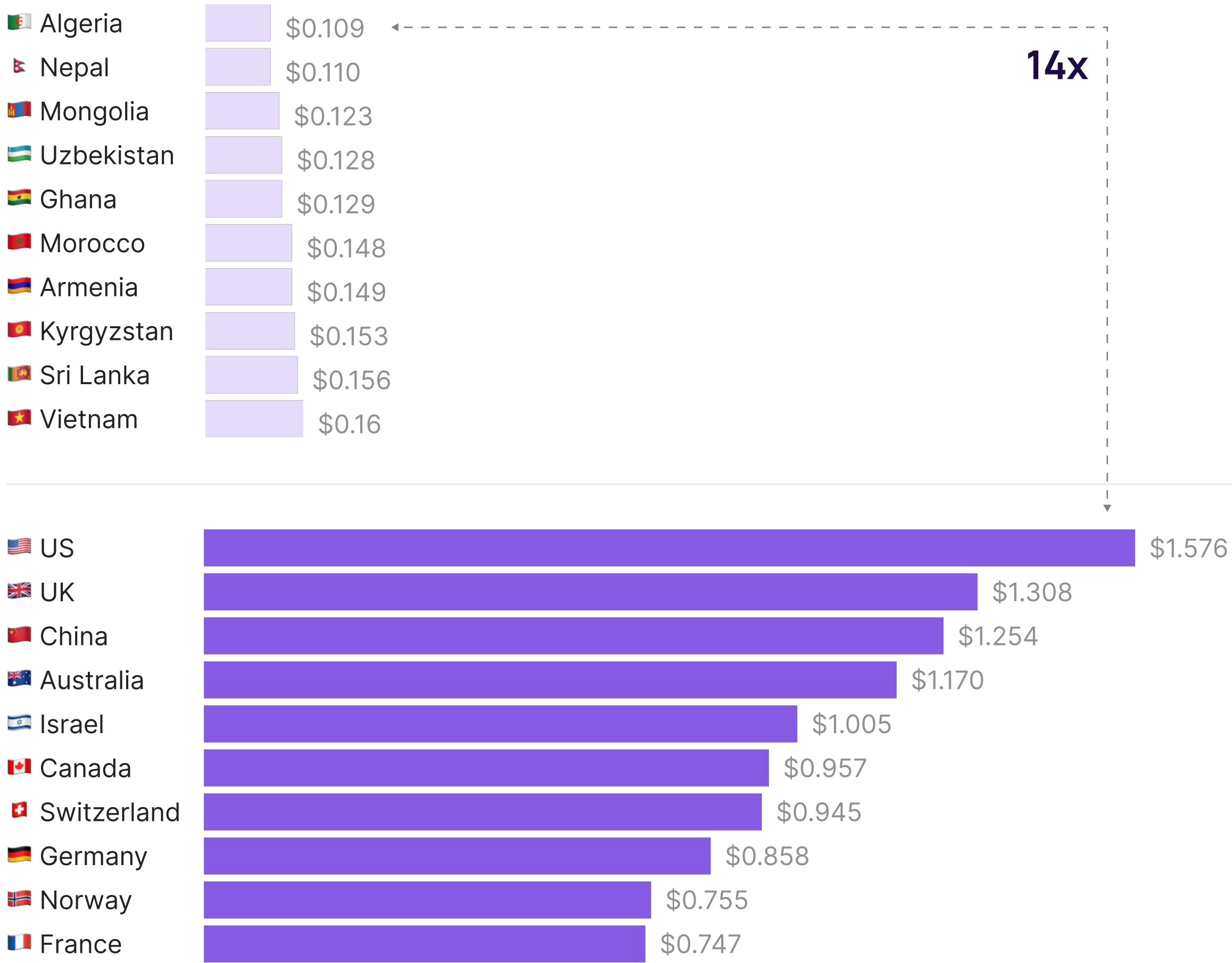


A tap in the US costs 14x more than a tap in Algeria

CPT varies 14x across 90 markets, from \$0.11 in Algeria and Nepal to \$1.58 in the US.

The same dollar buys fewer taps in an expensive auction, regardless of how well those taps convert.

The 10 cheapest and 10 most expensive markets by cost per tap

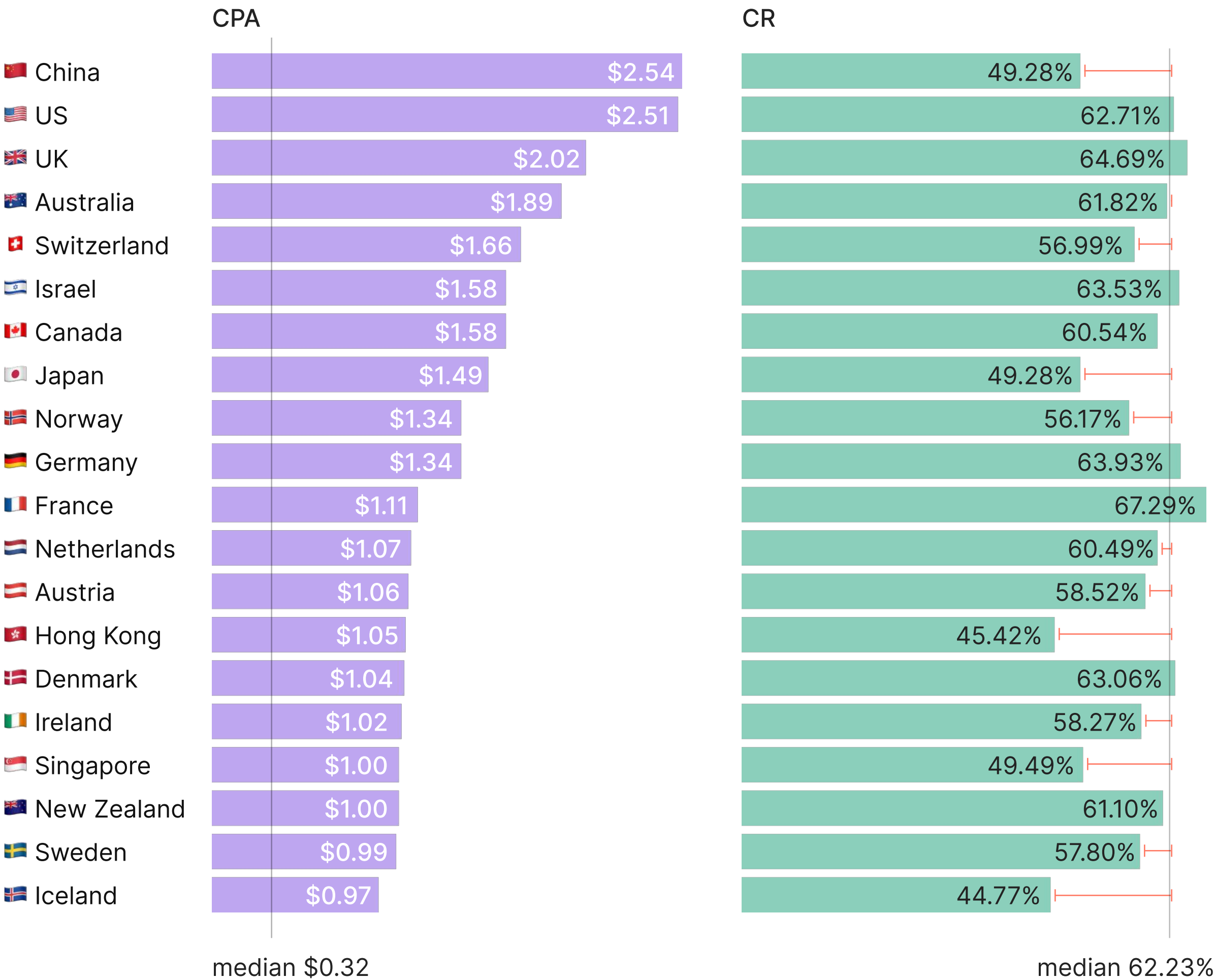


China and the US pay nearly the same per download. They convert 13 percentage points apart

The US converts 13 points higher than China for nearly the same tap price: \$2.51 vs \$2.54. France costs less than half (\$1.11) and converts higher than both at 67%. Iceland sits at the bottom of both columns: a \$0.97 tap that converts at just 45%.

6 of these 20 countries convert above the global median so their strong funnels make the auction price realistic. The other 14 convert below 62%, meaning teams are paying premium prices without premium conversion performance.

Cost per download breakdown for the 20 most expensive markets

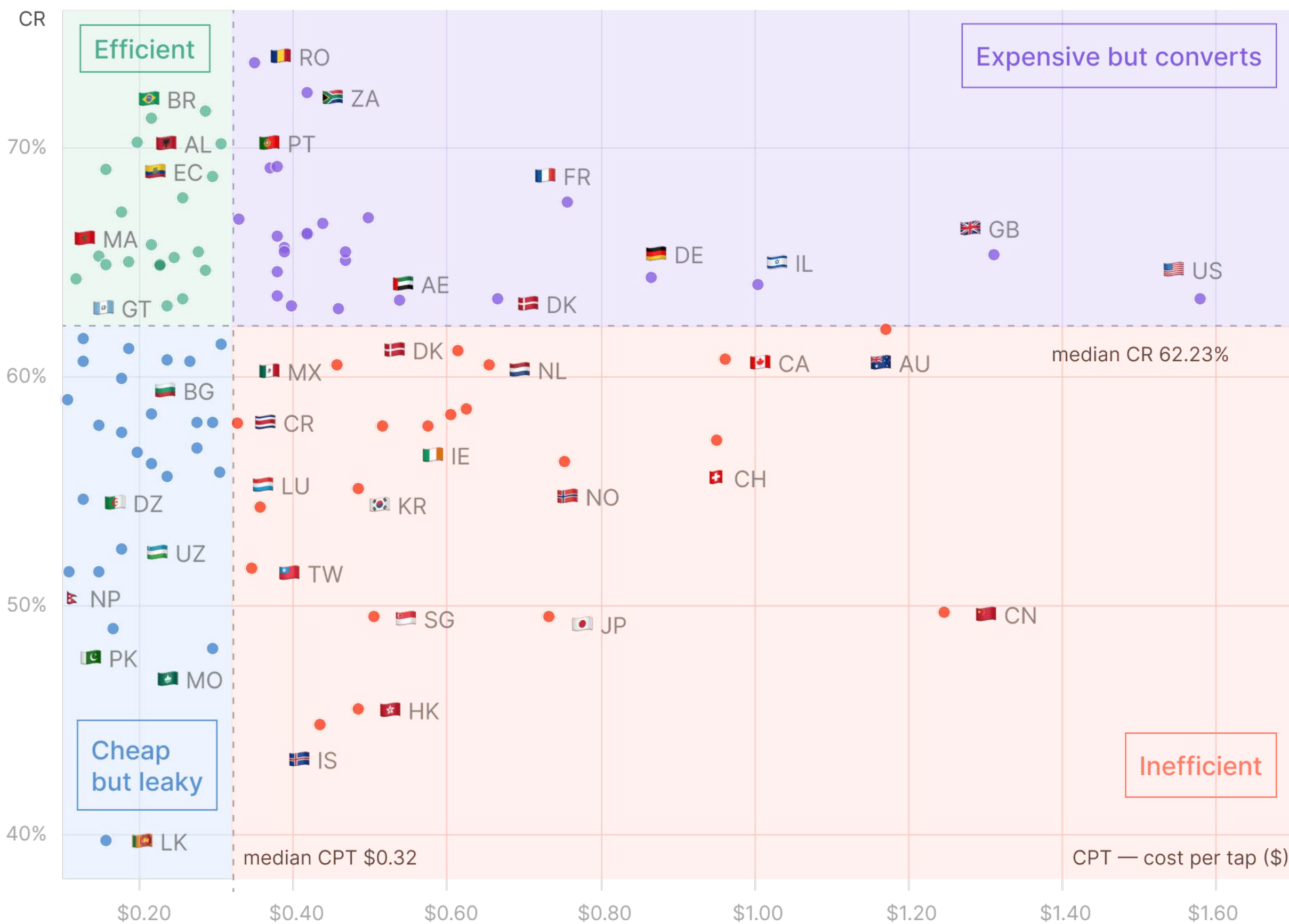


Brazil, Colombia, and 18 other countries convert like premium markets without a premium cost

Cheap taps don't predict weak conversion, and expensive taps don't guarantee strong conversion. The market splits almost evenly across all four quadrants.

Brazil converts at 71% for \$0.41 per download. The US converts at 63% for \$2.51. Both convert well, but there is 6x cost difference.

The most and least efficient markets plotted by CPT and CR



Efficient: MN, MA, JO, VN, KE, AL, LB, AZ, PY, BH, PH, GT, OM, DO, PA, BR, MY, CO, LV, EC.
Expensive but converts: RO, UA, PT, HR, ZA, PE, CL, GR, AR, QA, KW, PL, CZ, SA, ES, IT, HU, AE, BE, DK, FR, DE, IL, GB, US.
Cheap but leaky: DZ, GH, NP, IQ, UZ, AM, IN, KG, EG, KZ, KH, PK, ID, BO, HN, LK, CY, SV, BG, TH, EE, SI, SK, TR, MO.
Inefficient: CN, AU, CH, CA, JP, NO, NL, AT, HK, IE, SG, NZ, SE, IS, FI, KR, MX, TW, LU, CR

Connect Apple Ads spend to subscription revenue

Predict LTV before users complete their first month, using Adapty's model trained on \$3B+ in tracked subscription revenue.

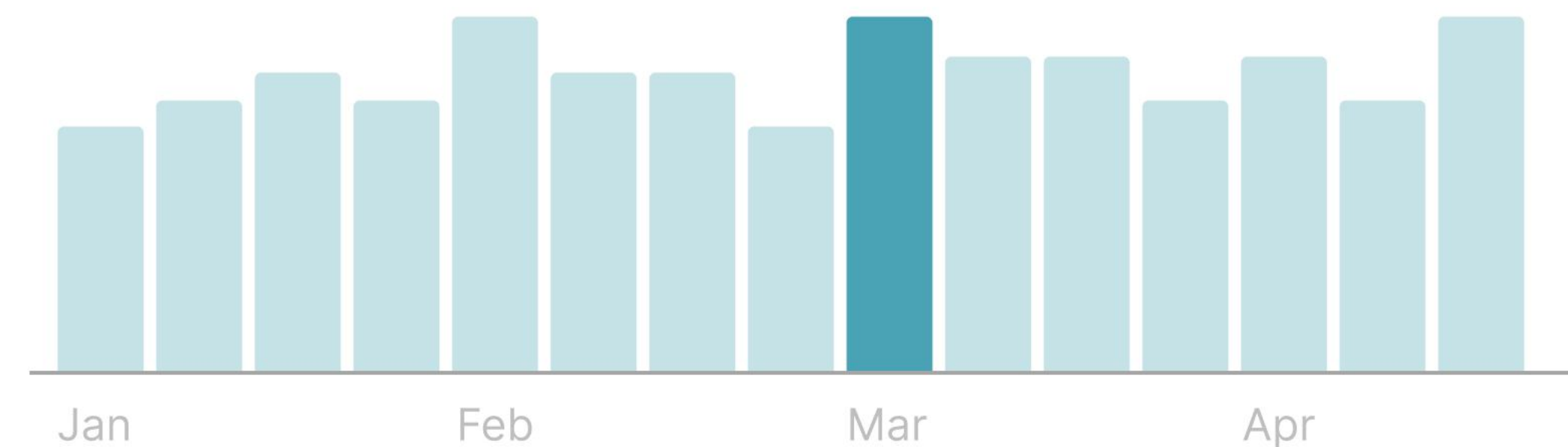
Attribute subscription revenue back to the keyword, campaign, and country that drove it.

Analyze cohorts at the subscription event level — trial-to-paid, renewal, churn — without attribution lag, sampling, or MMP reconciliation.

[Learn more >](#)

Revenue

\$73.4k +4.1%



New trials

498.4k +7.1%



New sub

89.7K +6.2%

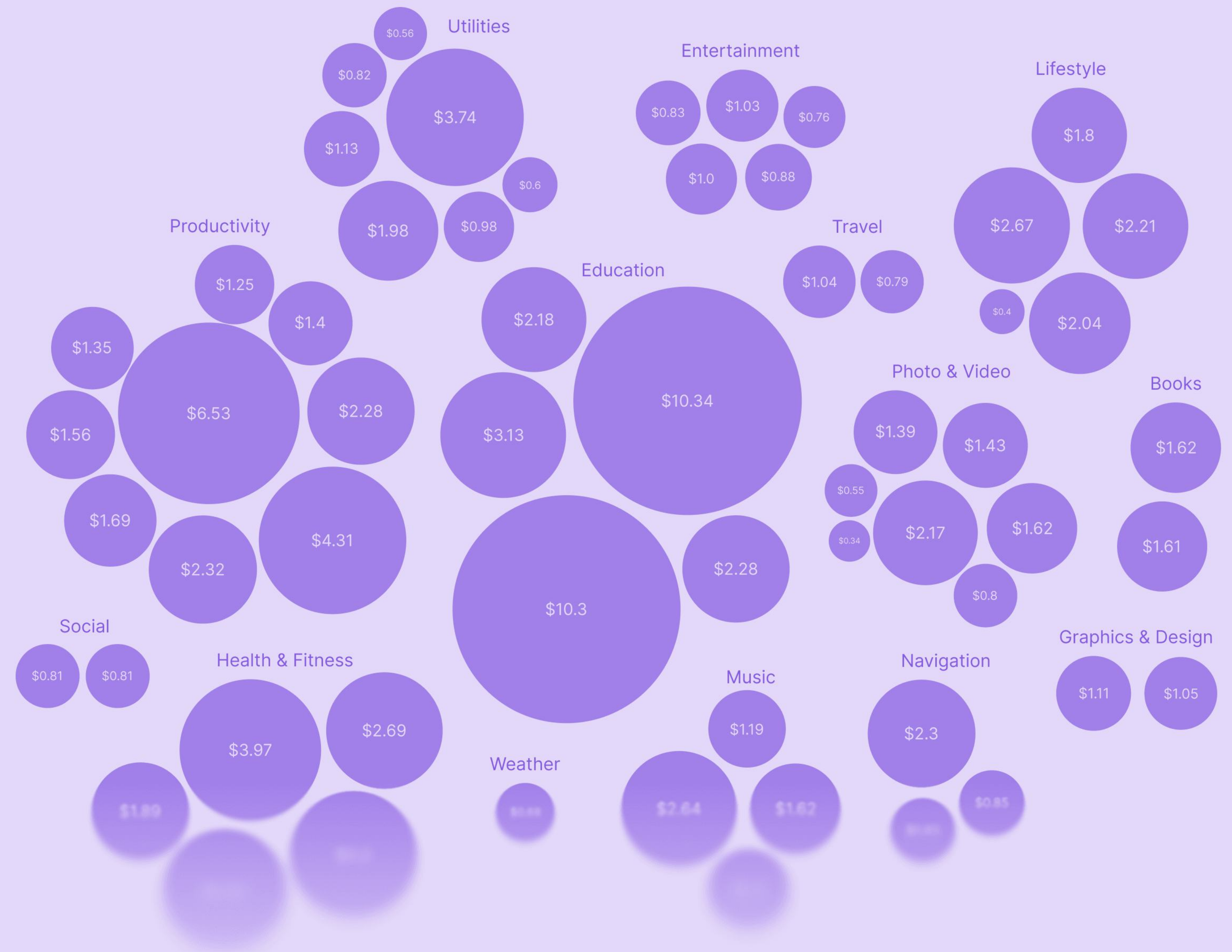


MRR

\$1.2M +14.1%



Niche-level insights



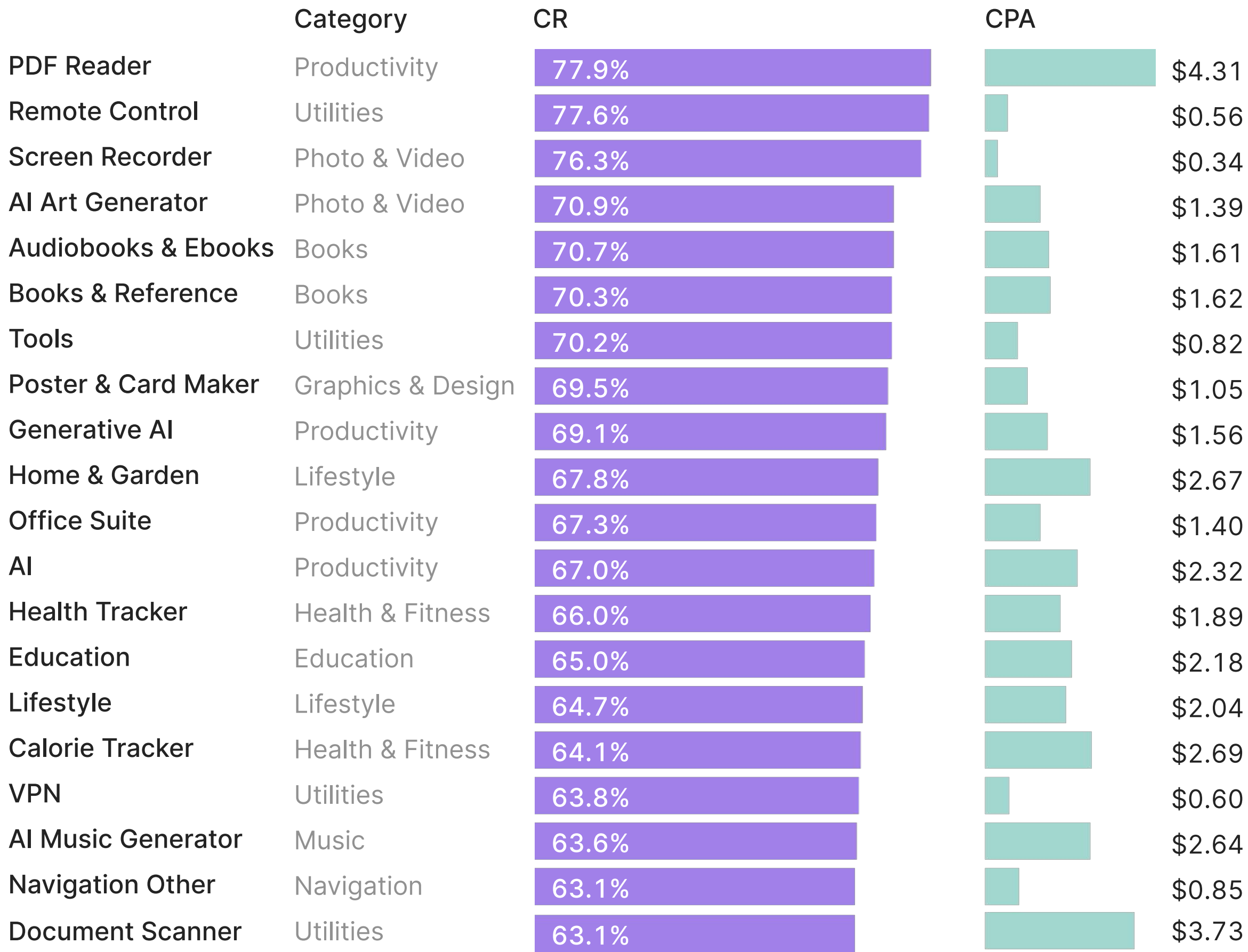
PDF Reader and Screen Recorder convert above 76%. One costs 12x more

The top 20 highest-converting niches range from \$0.34 to \$4.31 in CPA.

Strong conversion doesn't always mean cheap acquisition. Only 5 of the top 20 niches come in under \$1 per download.

8 of the top 20 converters cost over \$2 per download. High conversion rates don't guarantee efficient CPAs.

Top 20 niches by conversion rate, with cost per acquisition



Median CR: 61.25% across 59 niches P75 CR threshold: 64.42% CR spread: 2.7× (28.9% → 77.9%)

Utilities apps own almost 50% of the top 20 niches by TTR

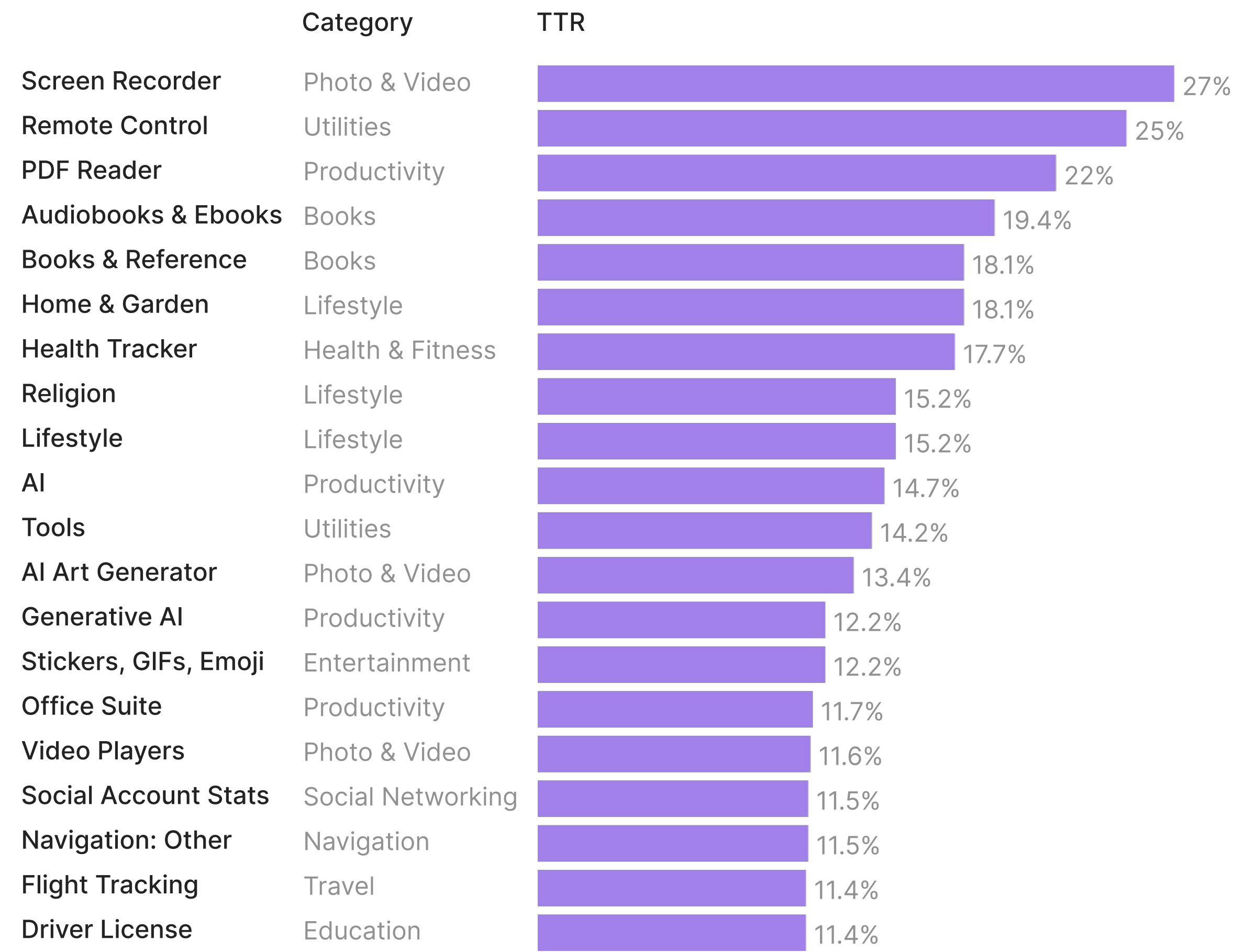
The most efficient Apple Ads advertisers are running Screen Recorders, Remote Control apps, and PDF Readers.

Screen Recorder leads at 27% TTR. The 20th-ranked niche comes in at 11%

The top three niches see nearly 3× the TTR of the bottom of the list.

Three of the five AI-related niches show up here. AI, AI Art Generator, and Generative AI all rank in the top 20 TTR. AI is earning attention both in search results and press coverage.

Top 20 niches by tap-through rate



Two lifestyle apps: Religion and Home & Garden sit 7.6× apart in cost-per-tap

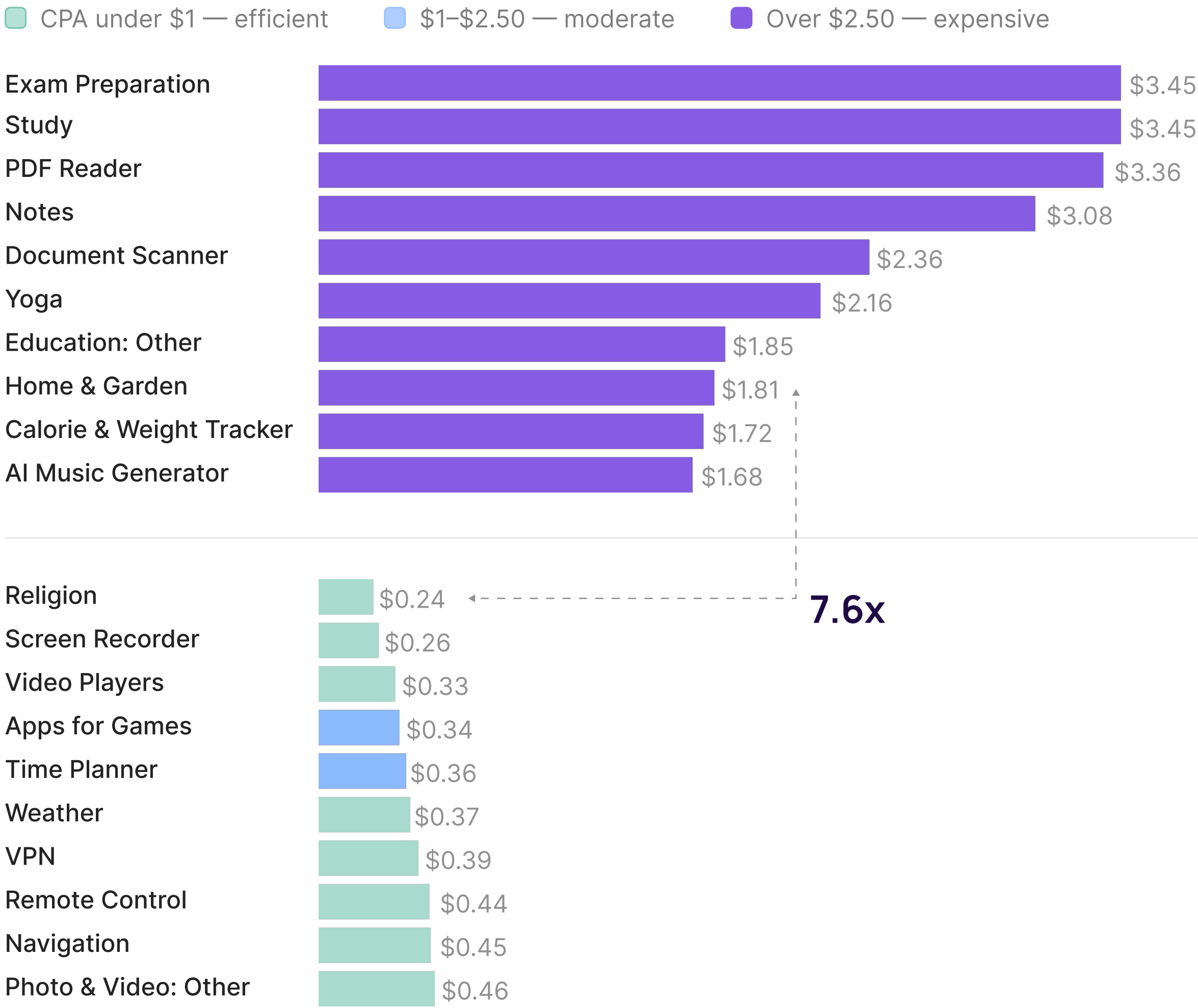
Utilities apps appear at both ends of this chart. 6 of the 10 cheapest CPT niches are Utilities, including Screen Recorder, VPN, and Remote Control.

3 of the 10 most expensive are also Utilities: PDF Reader, Notes, Document Scanner.

Religion has the cheapest CPT in the dataset at \$0.24 per tap. That's cheaper than any other niche, and cheaper than the median in most countries.

Four niches sit above \$3 per tap: Exam Preparation, Study, PDF Reader, and Notes. Three convert below 48%, while PDF Reader converts at 78%. Similar acquisition costs, dramatically different conversion rates.

The 10 highest and lowest cost-per-tap niches

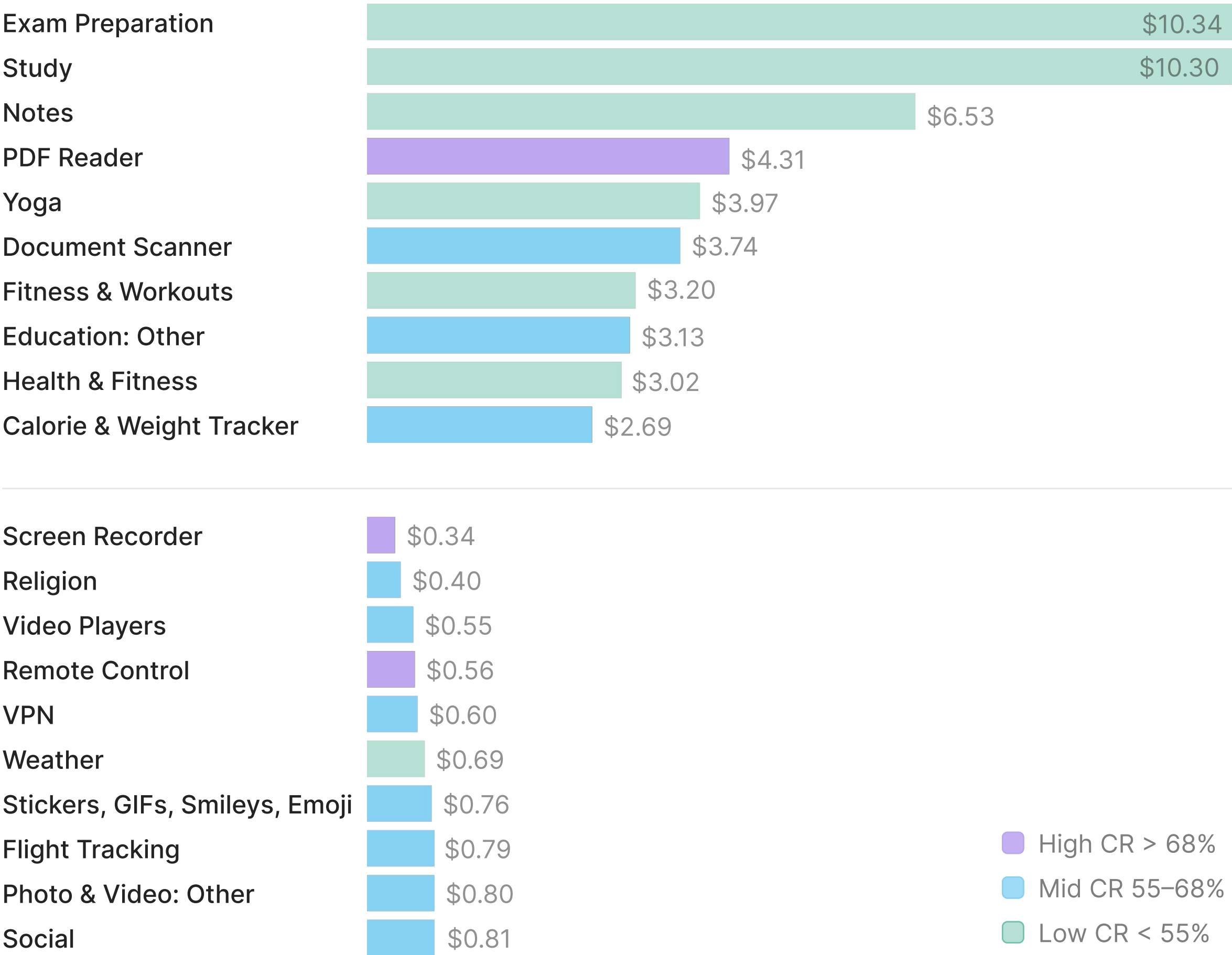


30x cost per acquisition spread across 59 niches

Screen Recorder delivers a user for \$0.34. Exam Preparation costs \$10.34 for the same outcome. Your niche is the single biggest determinant of which end you're closer to.

PDF Reader sits in the expensive cluster at \$4.31 CPA, but its 78% conversion means most taps turn into downloads. Yoga sits nearby at \$3.97, but its 54% conversion means nearly half of every tap is wasted.

Top 10 niche CPAs vs bottom 10 niche CPAs with CR tier overlay

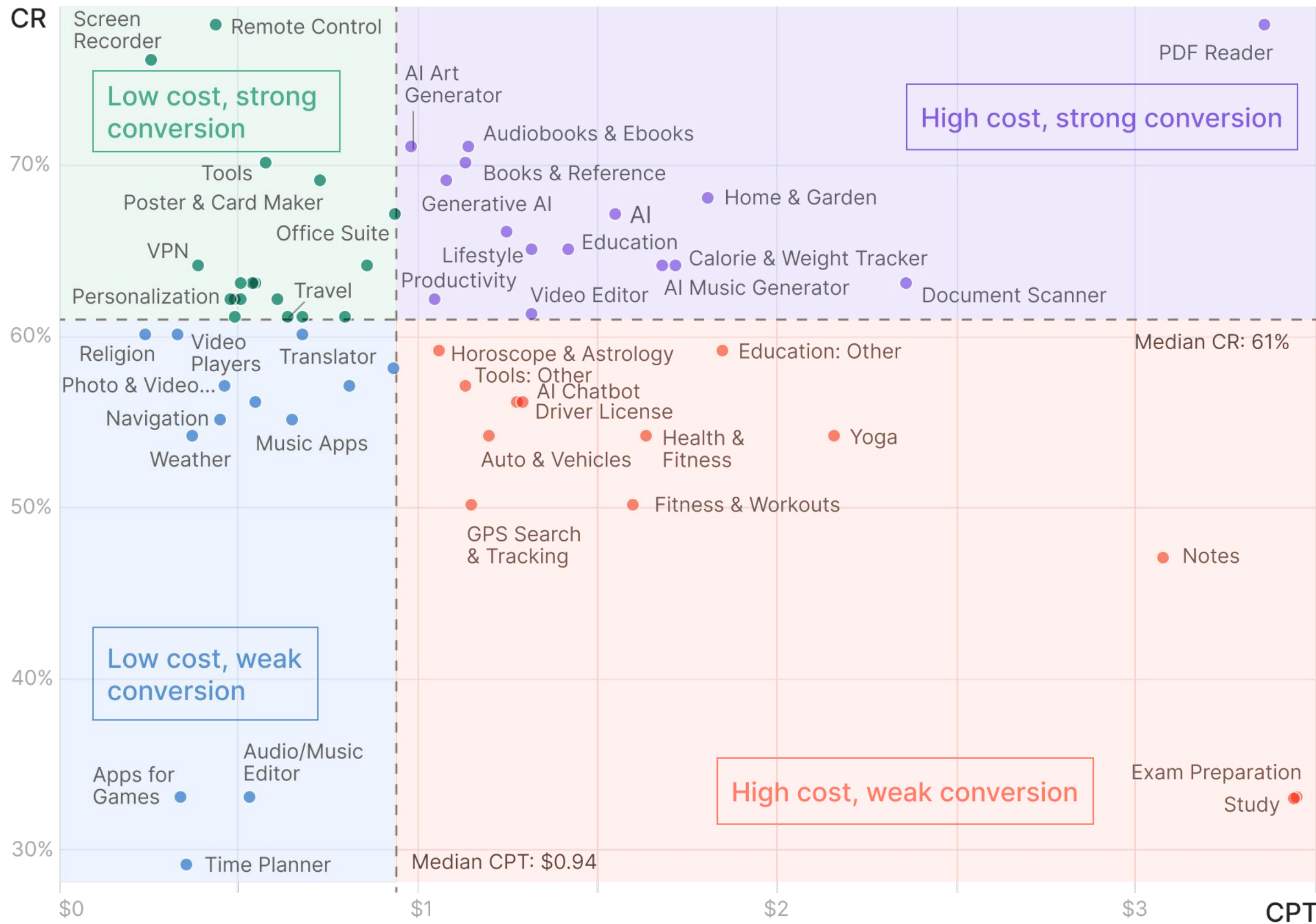


Lower-cost niches solve needs. Higher-cost build habits

Apps that solve an immediate problem tend to cluster on the lower-cost side: Screen Recorder, Remote Control, Translator. Apps built around ongoing behavior sit on the higher-cost side: Yoga, Notes, and Exam Prep.

CPT varies 14× across 59 categories, while CR varies nearly 3×. Together they produce a 30× CPA spread. Two apps in the same App Store category can land in completely different quadrants on this map.

Niches plotted by cost per tap and conversion rate



Efficient: Screen Recorder, VPN, Remote Control, Stickers/GIFs/Emoji, Flight Tracking, Social Account Stats, Personalization, Navigation: Other, Entertainment: Other, Tools, Recorder, Travel, Poster & Card Maker, Music Apps: Other, Apps.

Expensive but converts: Office Suite, AI Art Generator, Productivity, Generative AI, Books & Reference, Audiobooks & Ebooks, Health Tracker, Lifestyle, Education, AI, AI Music Generator, Calorie & Weight Tracker, Home & Garden, Document Scanner, PDF Reader.

Cheap but leaky: Religion, Video Players, Apps for Games, Time Planner, Weather, Navigation, Photo & Video: Other, Audio/Music Editor, Entertainment, Music Apps, Translator, Graphics & Design, Photo Editor, Social.

Inefficient: Photo & Video, Horoscope & Astrology, Tools: Other, GPS Search & Tracking, Auto & Vehicles, AI Chatbot, Driver License, Video Editor, Fitness & Workouts, Health & Fitness, Education: Other, Yoga, Notes, Study, Exam Preparation.



Cost per tap is a readout of your competitors' LTV

In niche apps the real volume sits on a handful of obvious head terms that name the core function: PDF reader, receipt scanner, invoice maker, step tracker.

Every competitor bids on those same terms regardless of what else is in their keyword pool, so the cost per tap on them is really a readout of what your competitors' LTV can tolerate.

When several of them consistently outbid you there over months, not one competitor for a couple of weeks, that's a signal your monetization is sitting behind theirs.

Before you touch your bids or your keywords again, go look at their pricing and packaging, because a cost per tap you can't afford usually traces back to an LTV you haven't built yet.



Kevser Imirogullari

Head of Growth, FlipaClip | growthbykev.com

Five key takeaways

1

Apple Ads converts 2x more installs to paid than other paid channels.

The gap is 2.5× at trial start and 2.1× through install-to-paid. The advantage is biggest in emerging markets.

2

Cost per paying subscriber varies 28x by country.

24 markets cost under \$20 per paying subscriber — Guatemala, Costa Rica, and Paraguay all under \$14. The most expensive, Nepal at \$362.55, pays back for almost no app.

3

The most efficient markets are Tier 2-3.

Paraguay, Costa Rica, Guatemala, Indonesia, and Brazil deliver 65-76 paying subscribers per \$1,000. The US produces 15. The UK produces 19.

4

Custom Product Pages built around user intent lift downloads by 23%.

Building CPPs around intent clusters scales better than building one per keyword.

5

Tailored paywalls lift paying users by 76% and ROAS by 82% at Day 92.

Same campaign, same install, different paywall. Better-matched users retain longer.

Don't read benchmarks. Beat them.

Turn the numbers into revenue with Adapty.

See how it works >

