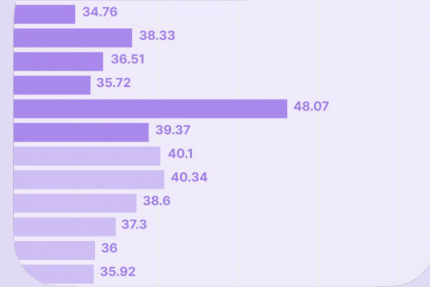# State of in-app subscriptions 2025
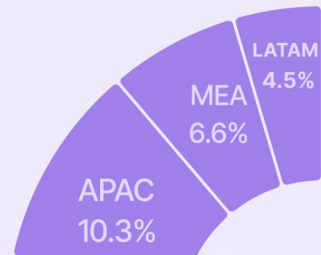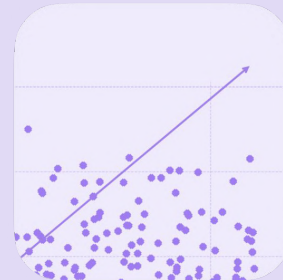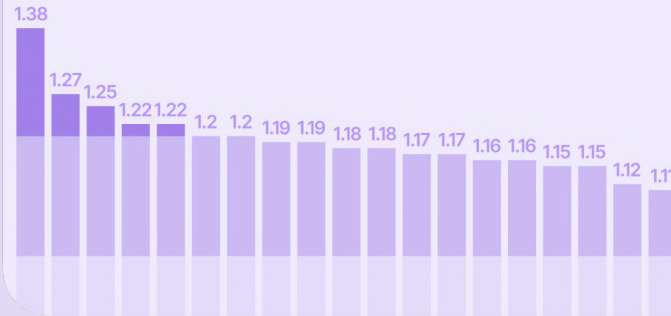
The most comprehensive report on paywall, pricing, and LTV benchmarks, based on $1.9B in analyzed revenue.

adapty.io

Adapty pricing index

Contents

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The in-app purchases market is on track to reach $170B in 2025

"

The 2025 market is booming. **In-app purchases are projected to hit $170B**. AI has made building and launching apps faster than ever. But here's what's gotten harder: turning those apps into sustainable revenue.

That's the gap we set out to solve. We analyzed **$1.9B in revenue across 11,000+ apps** to see what separates the winners from everyone else.

This report captures those insights.

We've added deep dives on LTV by plan and region, paywall experiments, and our new Adapty pricing index to help you spot trends before they become obvious.

Whether you're testing onboarding, rethinking your paywall, or figuring out what to charge, this report gives you the answers.

The opportunity is massive. Here's how to capture it.

Vitaly Davydov
CEO, Adapty

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3

From first dollar to millions, Adapty powers growth for **11,000+ apps**

$1.9B
tracked revenue

73K
paywalls made

215M
transactions

99.99%
historical SLA

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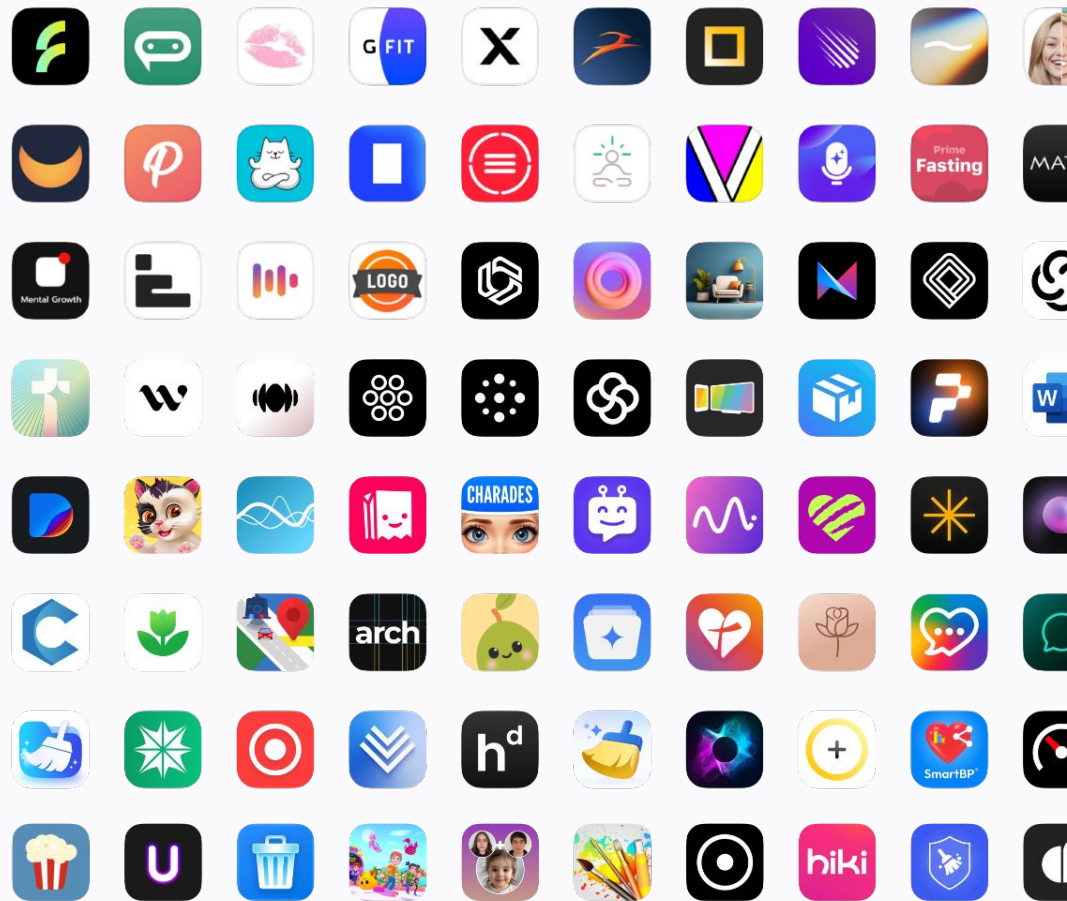
This report is based on anonymized in-app subscription App Store data from 2024-2025

What we analyzed:

Proceeds after Apple's 15/30% commission.

All App Store categories, with detailed segmentation for 6 major categories: Education, Utilities, Photo & Video, Health & Fitness, Lifestyle, Productivity.

Subscriptions (new purchases and renewals); **lifetime purchases** included where applicable.

Scope of apps
Apps with active subscription revenue and minimum install thresholds. Apps that use Adapty for in-app subscription management.

Five regions: US, Europe, LATAM (Latin America), APAC (Asia Pacific), and MEA (Middle East and Africa).

🔒Privacy & security. All data was processed in batches with added randomization to ensure privacy.

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Subscription market breakdown

Which regions drive subscription revenue, and how does plan length affect it?

Use these insights to focus on stronger markets and align plans with demand.

💡 This is the only section that includes one-time purchases. We've added them here to reflect their growing market share and highlight recent shifts in pricing strategies.

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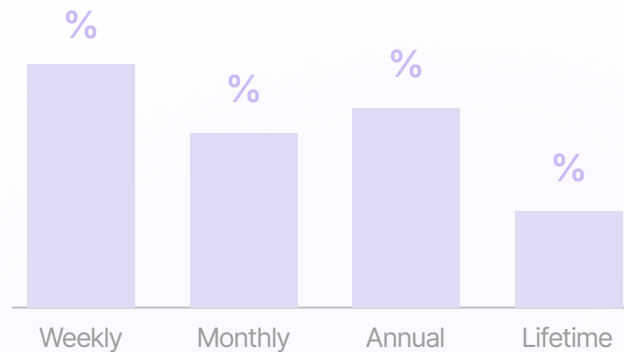
The **US** remains the largest market for in-app subscription sales, holding 48.9% of total revenue

- **The US** remains the top market, bringing in nearly half of all in-app subscription revenue (48.9%), far ahead of any other region.

- **Europe** holds second place with 24.8%, a strong baseline for pricing strategies in mature markets.

- **APAC** is gaining ground, now contributing 10.3% of global subscription revenue.

Subscription revenue share by region

- US 48.9%
- Europe 24.77%
- APAC 10.29%
- MEA 6.58%
- North America 4.96%
- LATAM 4.5%

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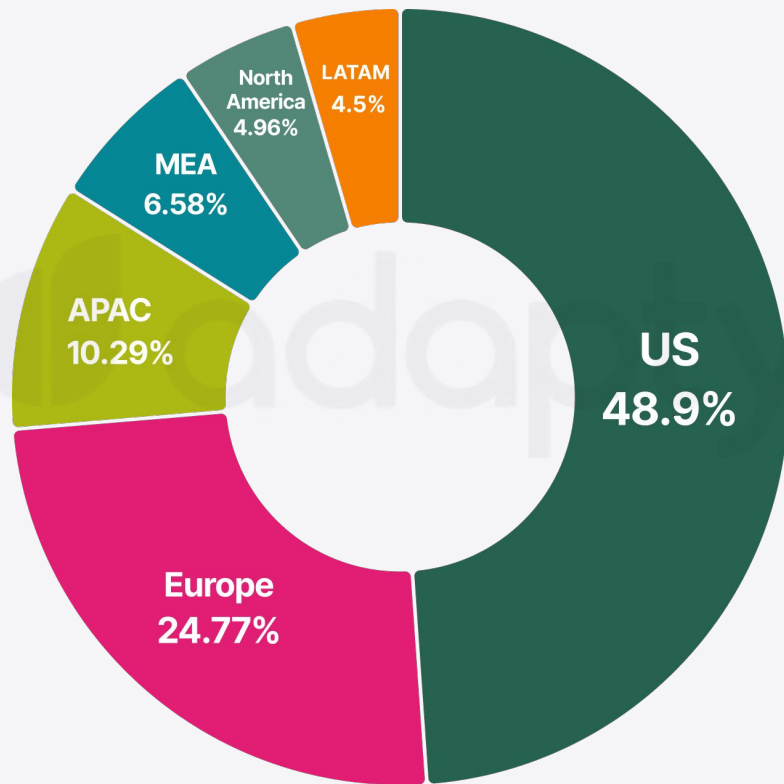
Weekly subscriptions show the strongest growth. One-time purchases are rising quickly, while long-term plans decline
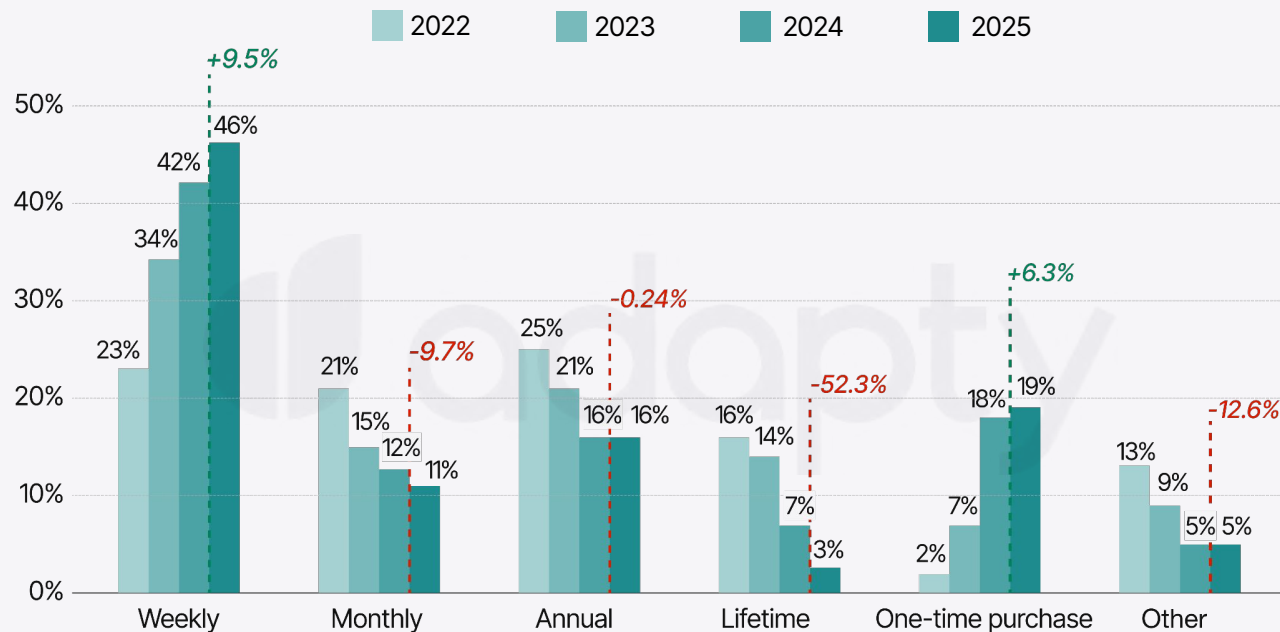
Revenue split by subscription duration (2022-2025)

- **Weekly** plans have grown by nearly 10% since 2024, capturing nearly half of all subscriptions. Users seem to prefer the flexibility of short-term plans.

- **One-time purchases** are up 6%, offering an additional path to revenue beyond subscriptions.

- **Annual, monthly, and lifetime subscriptions** have all decreased as users move away from long-term commitments.

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Subscription plans vary by category, reflecting specific user habits

- **Weekly** plans dominate in categories like **Productivity**, **Utilities**, and **Photo & Video**, making up over 50% of revenue in each.

- **Annual** plans lead in **Health & Fitness** (57%) and **Education** (28%), where users are more likely to commit to long-term results.

- **Lifestyle** apps favor diverse pricing models: "**Other**" plans lead (42%), with **weekly** and **monthly** tied at 22% each.

Subscription revenue split by duration and category
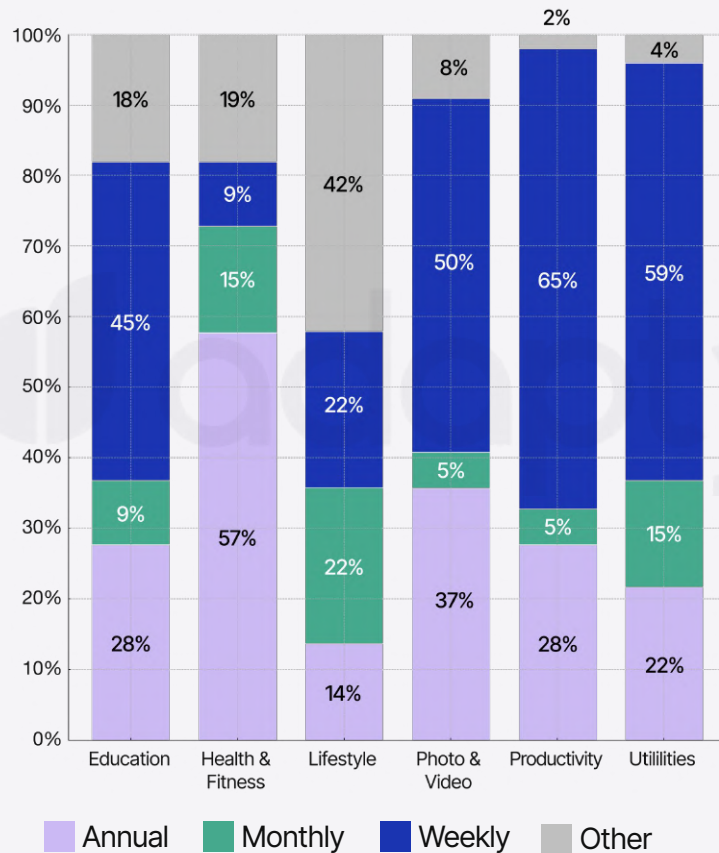
Weekly subscriptions generate the most revenue in nearly every region

- **Weekly** subscriptions lead in every region, topping out in **LATAM** (60%) and **MEA** (53%).

- **Annual** subscriptions hold a stable second place, with little regional variation.

- **Europe** is the most diversified market, with higher shares of **monthly** (15%) and alternative models like **one-time purchases** (8%) and **other** plans (6%).

Share of revenue split by subscription duration across regions

	Annual	Monthly	Weekly	Other	One-time purchase	Lifetime
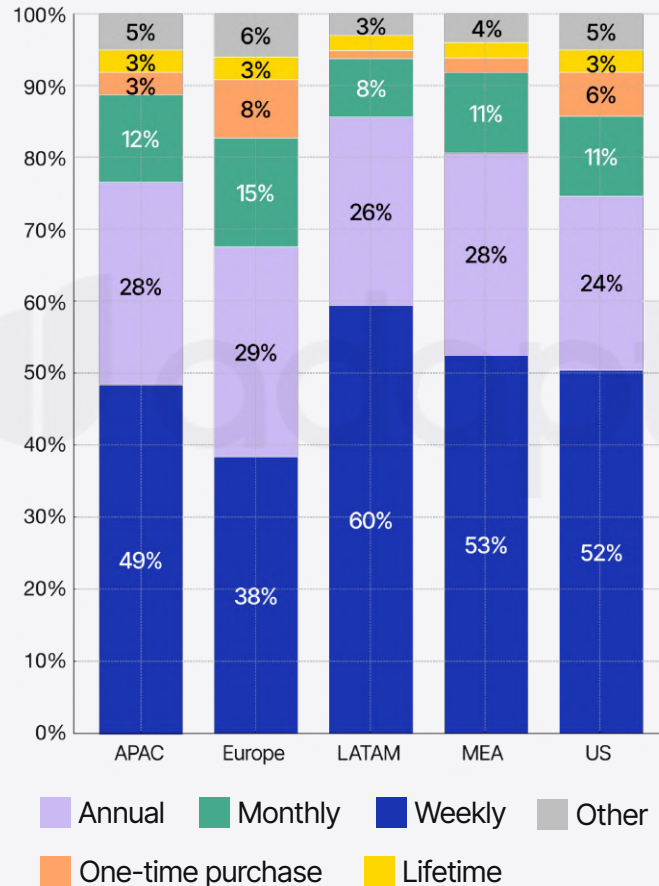
Downloads are slowing, but revenue keeps growing

"

Appfigures data shows that downloads are slowing, but revenue keeps growing. That shift makes one thing clear: converting as many users as you can is more important than ever.

Weekly subscriptions, while controversial for some, help make that happen. They offer low-commitment, are easier to justify, and convert better.

We see that clearly in categories like Utilities, Productivity, and Photo & Video, where they now drive the majority of revenue.

But here's the thing: Successful developers don't stop at the initial conversion.

They use weekly plans as a way to get the conversion, and then upsell to longer-term options through smart onboarding and timely prompts. If you're only offering monthly or annual plans, you're leaving conversions (and revenue) on the table.

The data backs it up: flexible pricing turns downloads into revenue, and short-term plans are a great way to get you foot in the door.

Ariel Michaeli
Founder & CEO, Appfigures

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Subscription price analysis

How do subscription prices vary by region and category?

We've broken down the key price benchmarks to help you price smarter and spot outliers.
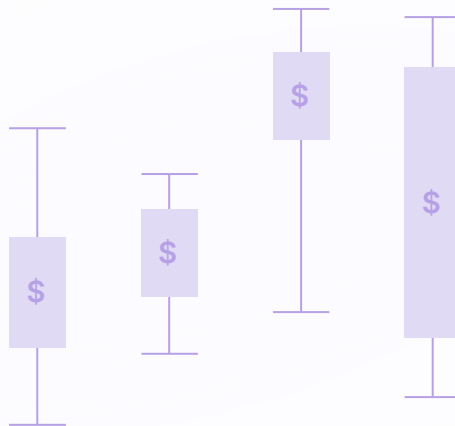
Weekly subscription prices rose across all regions. **Europe** and the **US** saw the fastest growth
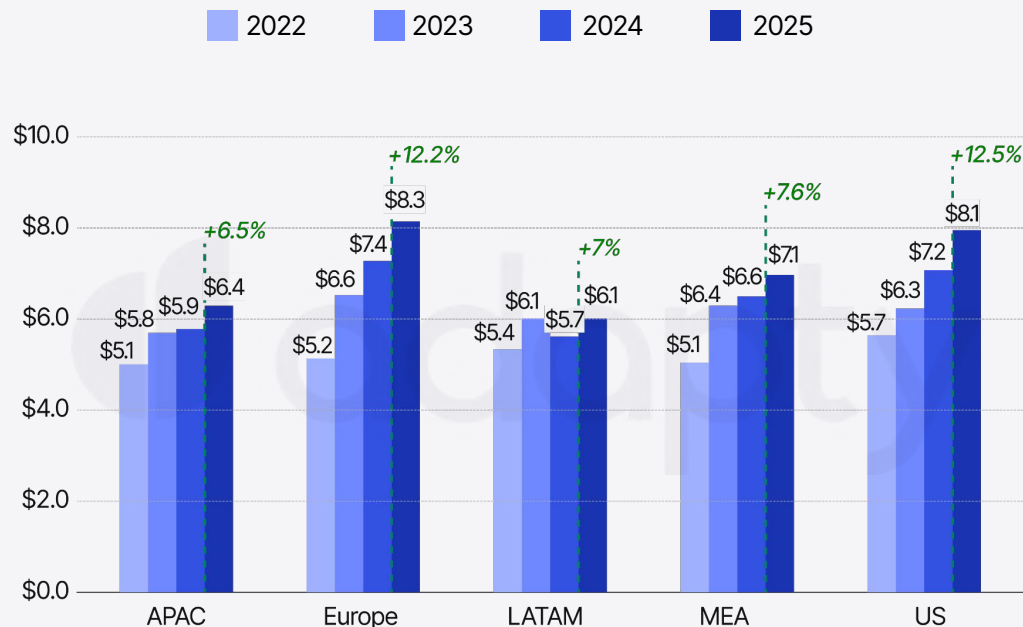
Average **weekly** subscription price by region (2022-2025)

- **Europe** has the highest weekly price at $8.3, up 12.2% since last year, the largest jump among regions.

- **The US** follows at $8.1 after a 12.5% increase.

- **APAC** and **LATAM** showed more modest growth, both adding about 7% compared to 2024.

- **MEA** reached $7.1, rising 7.6% year-over-year.

Weekly subscription prices show the widest spread in **Europe**, the **US**, and **MEA**

- **Europe** has the broadest range, from $3.1 to $12.9, suggesting both budget and premium pricing strategies.

- The **US** and **MEA** have tighter ranges, but still reach $10 or more at the top end.

- **APAC** and **LATAM** trend lower overall, with greater variation in the lower tiers, pointing to affordability-driven pricing.

Weekly subscription price distribution

14
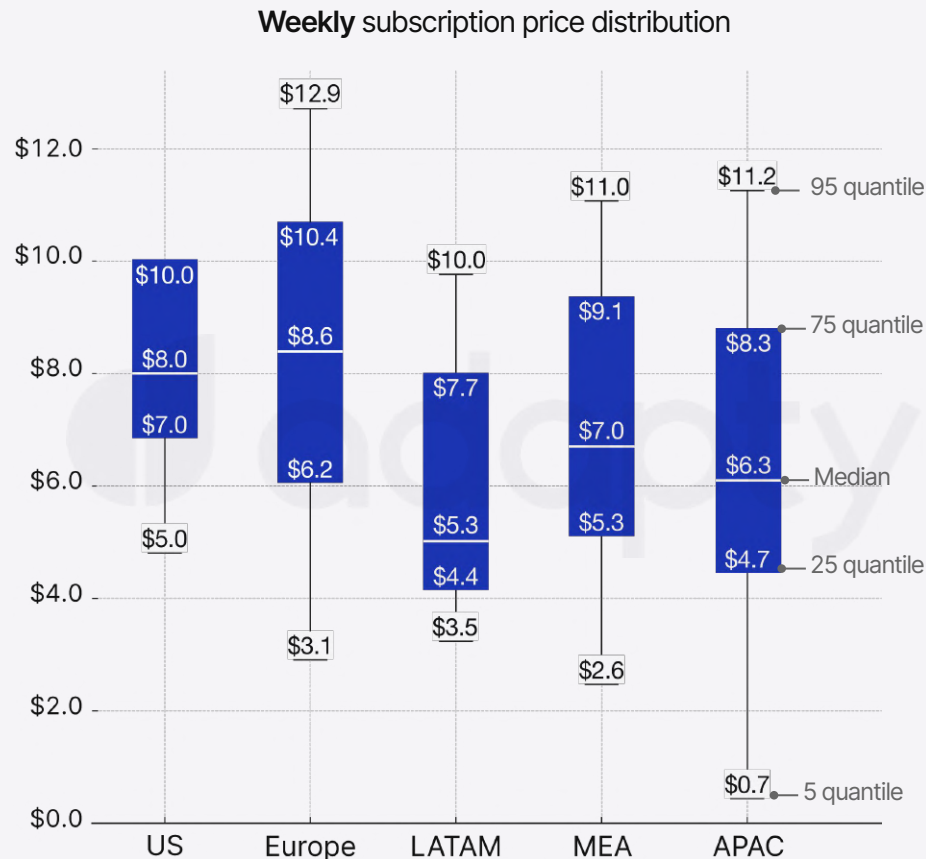
Monthly subscription prices are up everywhere, but the pace of growth varies
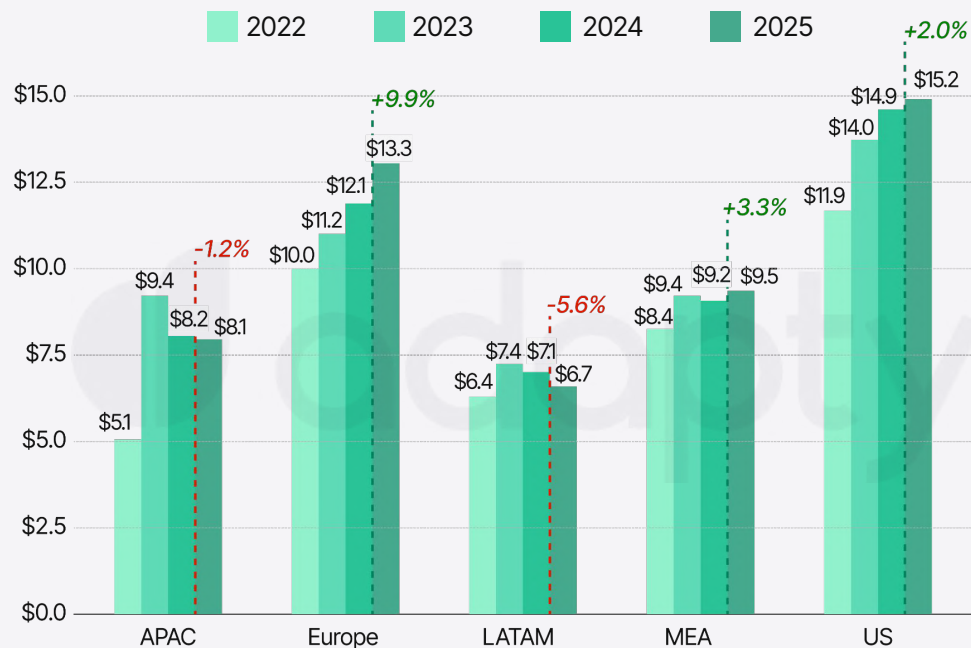
Average **monthly** subscription price by region (2022-2025)

- **Europe** recorded the largest year-over-year increase (+9.9%), with the average price reaching $13.3 in 2025.

- The **US** followed with +2% growth, pushing the average to $15.2.

- **LATAM** and **APAC** slipped slightly, with modest price declines versus 2024.

Monthly subscription prices vary widely across regions

- The **US** has the highest price ceiling, reaching $25 and a median of $13, signaling strong premium monetization.

- **Europe** shows the broadest range, from $2.1 $25.6, reflecting both budget and high-end tiers.

- **LATAM** and **APAC** cluster in the mid-to-lower pricing tiers, with medians around $6-6.6 and noticeably lower 5th and 25th percentile prices.

Monthly subscription price distribution

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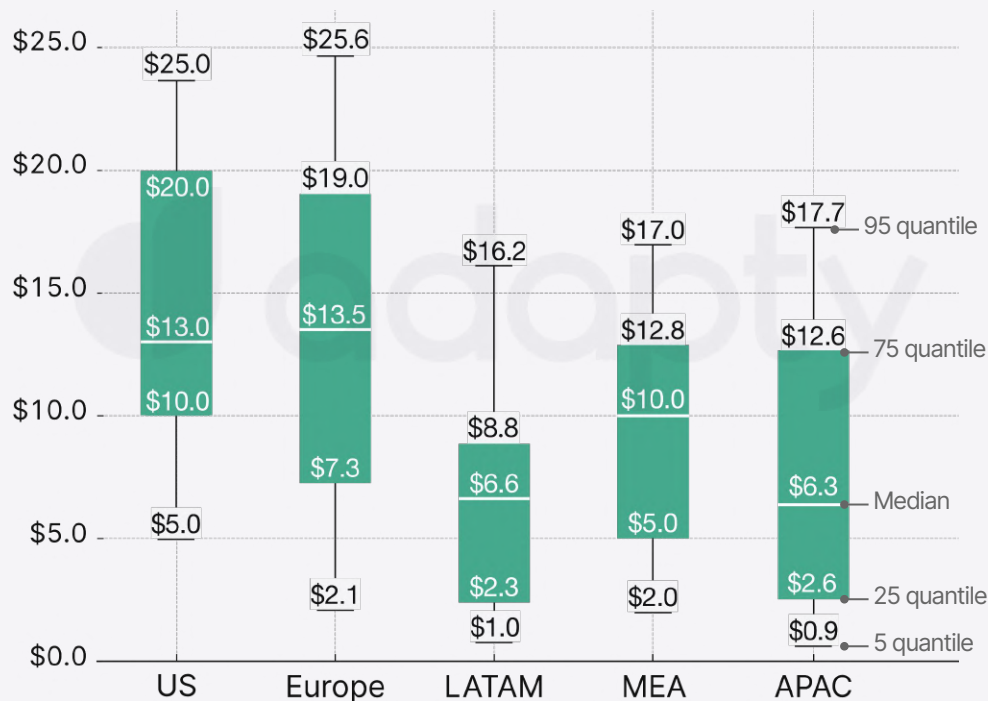
Annual subscription prices show mixed trends across regions
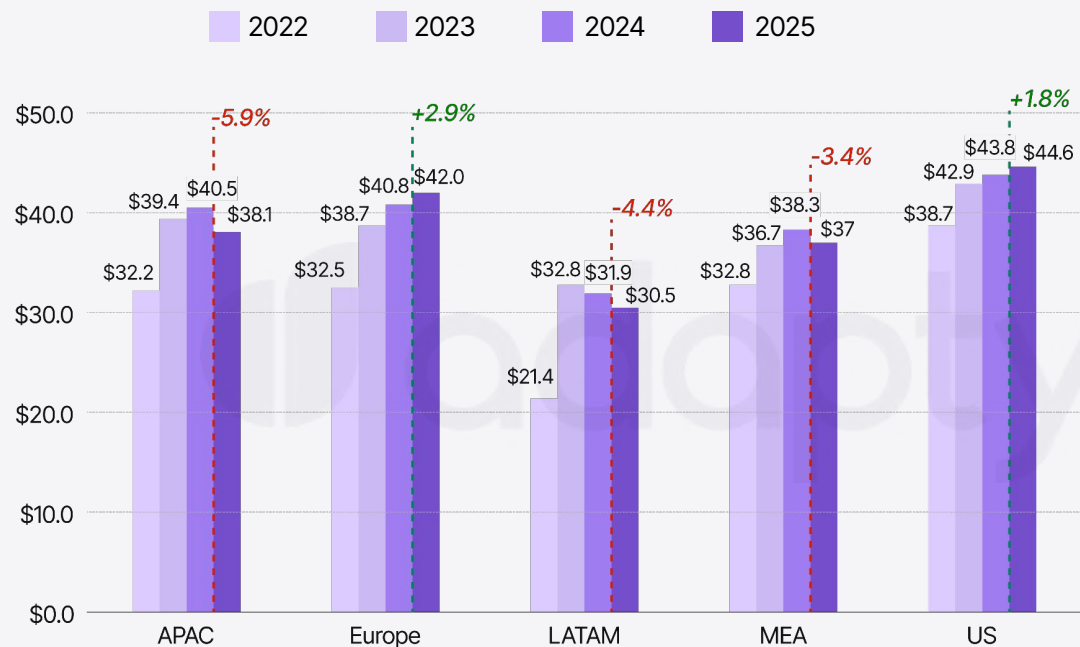
Average **annual** subscription price by region

Legend: 2022, 2023, 2024, 2025

APAC: $32.2, $39.4, $40.5, $38.1 — **-5.9%**
Europe: $32.5, $38.7, $40.8, $42.0 — **+2.9%**
LATAM: $21.4, $32.8, $31.9, $30.5 — **-4.4%**
MEA: $32.8, $36.7, $38.3, $37 — **-3.4%**
US: $38.7, $42.9, $43.8, $44.6 — **+1.8%**

- The **US** and **Europe** saw moderate increases, reaching $44.6 and $42 respectively.

- **LATAM, APAC,** and **MEA** saw modest declines, suggesting price stabilization in those markets.

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Price ceilings rise steeply in Western markets, while medians stay much the same

- The **US** tops out at $100, yet its median price is $40, nearly the same as **Europe** ($38.9) and **APAC** ($37). That points to more premium tiers rather than a broad price shift.

- **Europe** shows the widest spread, from $9.6 (5th percentile) to $91.1 (95th), reflecting both entry-level and high-end offers.

- **LATAM** and **MEA** sit lower overall, with medians under $35, but their price ceilings still reach $60-80, hinting at premium experiments in selected apps.

Annual subscription price distribution

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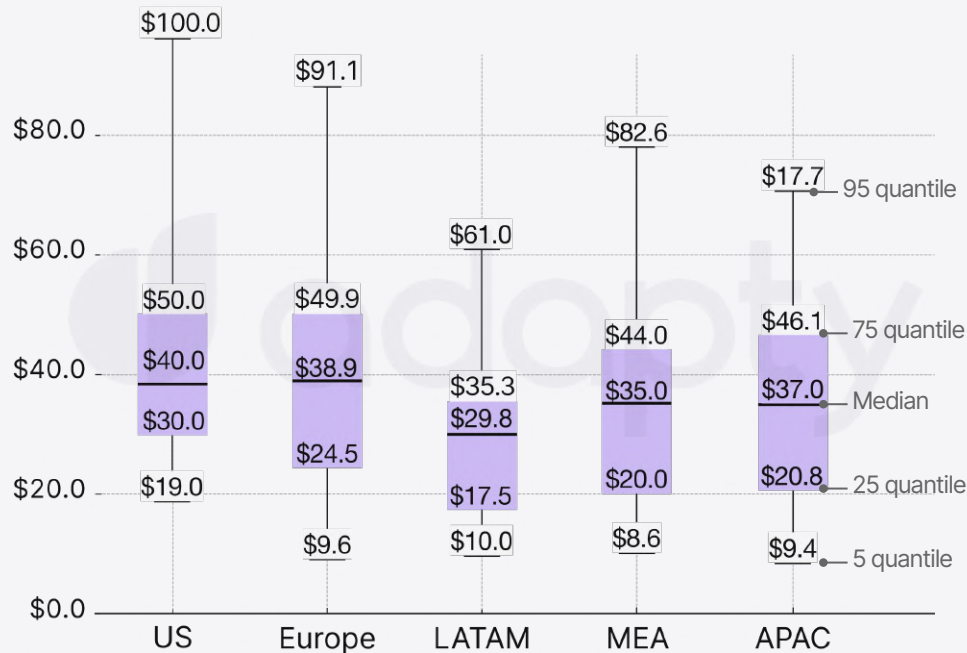
Some categories raise prices sharply across plans. Others keep them closer
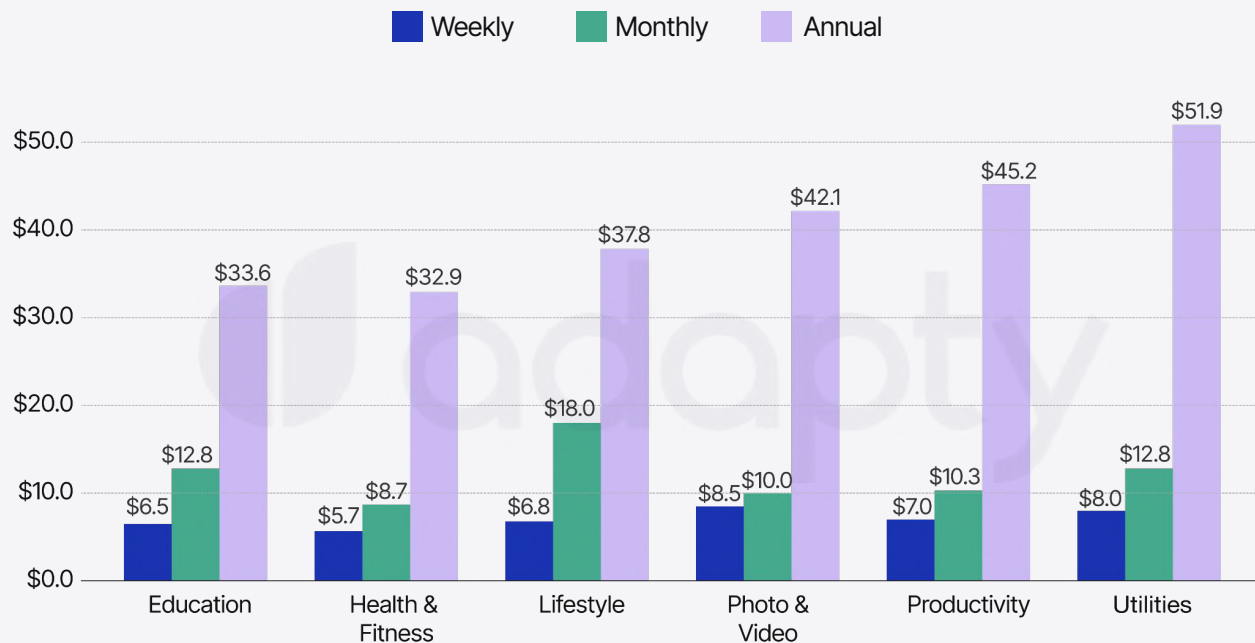
Average subscription price by category and duration

Legend: Weekly, Monthly, Annual

Category	Weekly	Monthly	Annual
Education	$6.5	$12.8	$33.6
Health & Fitness	$5.7	$8.7	$32.9
Lifestyle	$6.8	$18.0	$37.8
Photo & Video	$8.5	$10.0	$42.1
Productivity	$7.0	$10.3	$45.2
Utilities	$8.0	$12.8	$51.9

- **Utilities** and **Photo & Video** apps show the sharpest jumps: annual plans cost over 6x more than weekly.

- **Education** and **Health & Fitness** scale more gradually, at roughly 5x the weekly rate.

- **Lifestyle** apps lean on premium monthly pricing, averaging $18.

Pricing and packaging are key to accelerating subscription app revenue

" With app stores growing more competitive and AI costs rising, optimizing subscription pricing is more critical than ever, especially for apps with expensive LLM-powered features.

New apps often start with one subscription tier (monthly or annual) based on competitors. But failing to revisit pricing later is a missed opportunity: pricing and packaging changes can drive a 5-15% boost in revenue without hurting subscriber growth.

To optimize plans, companies can use techniques like:

- *Van Westendorp*: A quick and simple set of four survey questions that establish an Acceptable Price Range (APR) and Optimal Price Point (OPP).

- *MaxDiff*: Presents respondents with sets of features and asks them to select which are most vs. least important to determine relative feature preferences.

- *Conjoint*: Asks respondents to choose from hypothetical subscription plans with different prices and features to measure both relative preferences and marginal willingness-to-pay per feature.

Pairing these with user segmentation (demographic, psychographic, regional) helps fine-tune pricing and align discounts with willingness to pay, boosting ARPU while keeping conversion high.

Phil Carter
Founder & CEO, Elemental Growth

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Adapty pricing index

How much more should you charge in the Netherlands vs Turkey?

We've built the index that compares median subscription prices across countries, using the US as a baseline (1.00).

Examples (US = $12.99):

- Netherlands – $21.00 → index 1.62 → 62% more expensive

- Turkey – $3.79 → index 0.29 → nearly 3.5x cheaper

Price index (relative to US)

Netherlands 62% more expensive

Turkey nearly 3.5x cheaper

1.62 index

1.00
US price index

0.29 index

Netherlands

Turkey
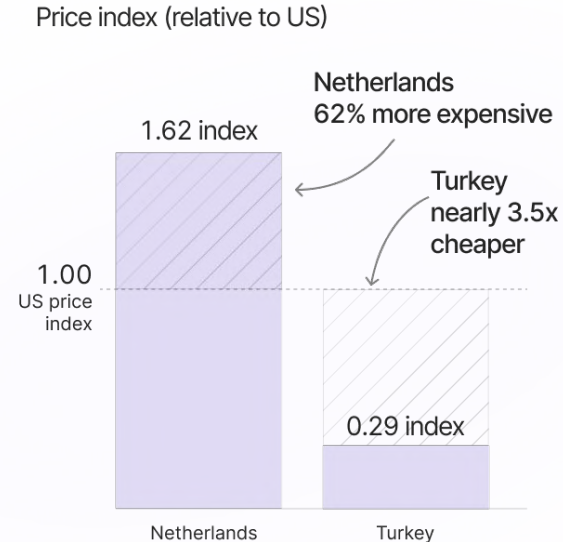
What users pay differs 2-3x across countries. Yet most pricing strategies don't reflect that

> Most pricing decisions still rely on gut feelings or vague regional multipliers. But user willingness to pay varies and changes fast.
>
> That's why we created the **Adapty pricing index** – a country-level benchmark built on real subscription payments across thousands of apps.
>
> It shows how much users actually pay in each country, normalized to a US baseline (1.00).

So instead of guessing whether $6.99 is too much in Turkey or too little in the Netherlands, now you'll know.

Use the index to adjust your prices with confidence, spot revenue opportunities, and scale smarter in every market.

Kir Potekhin
CPO, Adapty

Follow us:

Weekly subscription pricing index

Legend: ■ <1.0   ■ 1.0-1.2   ■ >1.2

Country	Index
Poland	1.38
Sweden	1.27
UK	1.25
France	1.22
Denmark	1.22
Netherlands	1.2
Germany	1.2
Austria	1.19
Portugal	1.19
Latvia	1.18
Czechia	1.18
Slovakia	1.17
Norway	1.17
Cyprus	1.16
Spain	1.16
Lithuania	1.15
Italy	1.15
Malta	1.12
Estonia	1.11
Switzerland	1.11
Hungary	1.1
Singapore	1.05
Greece	1.04
Bulgaria	1.03
New Zealand	1.02
Guatemala	1
Uruguay	1
El Salvador	1
Bolivia	1
Honduras	1
Nicaragua	1
Costa Rica	1
Paraguay	1
US	1
Argentina	1
Canada	1
Hong Kong	0.97
Taiwan	0.95
Colombia	0.94
Australia	0.93
China	0.89
DR	0.86
Ecuador	0.86
Mexico	0.84
Peru	0.79
Chile	0.77
Philippines	0.75
Malaysia	0.74
Panama	0.71
Turkey	0.56

Monthly subscription pricing index

Legend: <1.0 | 1.0-1.2 | >1.2

Country	Index
Netherlands	1.62
Denmark	1.25
UK	1.21
Sweden	1.11
Switzerland	1.11
Germany	1.09
France	1.08
Greece	1.07
Norway	1.06
Portugal	1.05
Austria	1.04
Cyprus	1.04
Malta	1.03
Australia	1.03
Singapore	1.02
New Zealand	1
Canada	1
US	0.97
Hong Kong	0.94
China	0.92
Costa Rica	0.89
DR	0.87
Taiwan	0.85
Hungary	0.85
Italy	0.84
Bulgaria	0.83
Poland	0.83
Lithuania	0.81
Estonia	0.8
Spain	0.77
Latvia	0.77
Slovakia	0.77
Mexico	0.77
Czechia	0.77
Honduras	0.77
Panama	0.65
Ecuador	0.63
Bolivia	0.57
El Salvador	0.53
Guatemala	0.38
Paraguay	0.29

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Annual subscription pricing index

Legend: <1.0 | 1.0-1.2

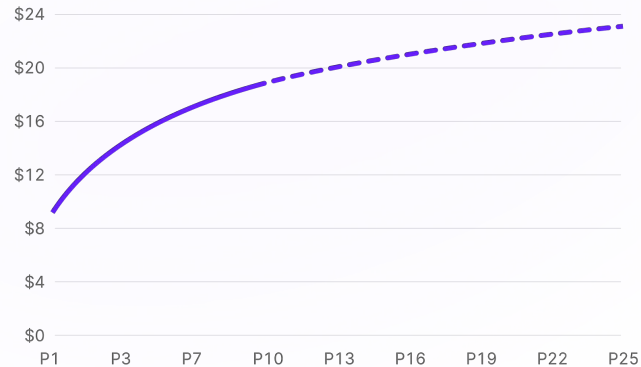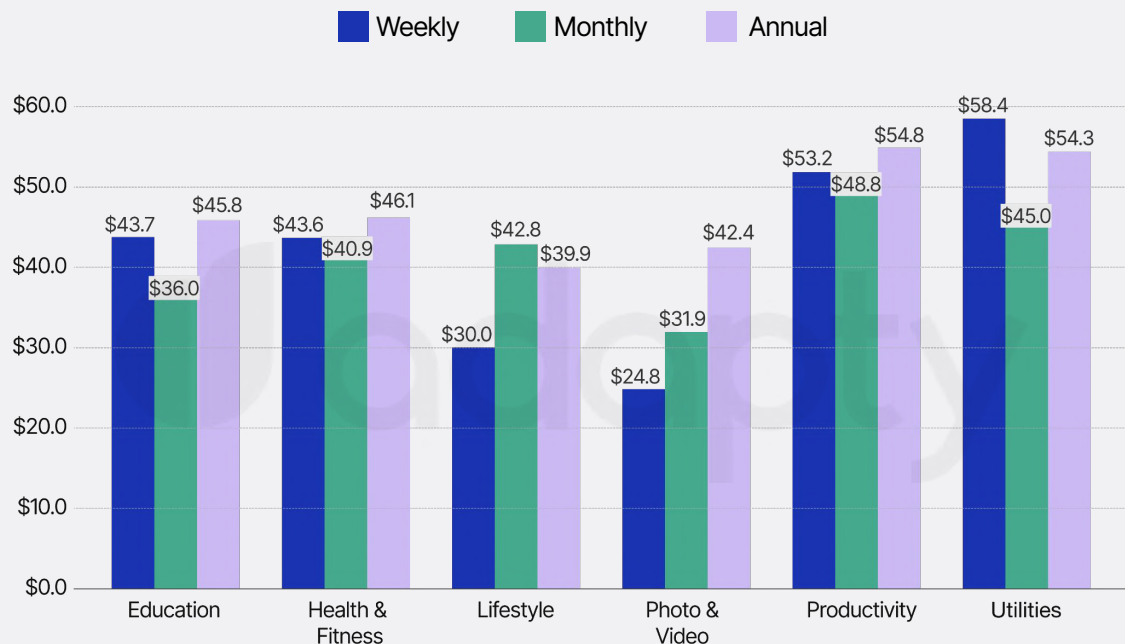| Country	Value
Singapore	1.11
UK	1.11
Denmark	1.09
Switzerland	1.08
Malta	1.08
Cyprus	1.08
Portugal	1.06
Italy	1.04
Estonia	1.04
France	1.04
Germany	1.04
Norway	1.03
Spain	1.03
Latvia	1.03
Lithuania	1
DR	1
Panama	1
US	0.99
New Zealand	0.97
Taiwan	0.96
Austria	0.95
Sweden	0.94
Greece	0.93
Netherlands	0.92
Poland	0.9
Australia	0.87
Hong Kong	0.85
Bulgaria	0.84
Uruguay	0.8
Canada	0.79
Argentina	0.77
Guatemala	0.75
Mexico	0.75
Hungary	0.75
Peru	0.75
Nicaragua	0.7
Chile	0.68
Philippines	0.65
Paraguay	0.59
Malaysia	0.36

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LTV and profitability

Which plans and pricing strategies drive long-term revenue?

We break down 12-month lifetime value (LTV) by plan duration, country, trial, and pricing tier.

LTV
**$21.10**

Weekly plans drive the highest LTV in top-performing categories

Weekly ■ Monthly ■ Annual ■

	Education	Health & Fitness	Lifestyle	Photo & Video	Productivity	Utilities
Weekly	$43.7	$43.6	$30.0	$24.8	$53.2	$58.4
Monthly	$36.0	$40.9	$42.8	$31.9	$48.8	$45.0
Annual	$45.8	$46.1	$39.9	$42.4	$54.8	$54.3

12-month customer LTV by subscription duration and category

- **Productivity** and **Utilities** see the highest LTV on **weekly** plans, the best results across all categories.

- **Annual** plans perform best in **Health & Fitness**, **Photo & Video**, and **Education**, where users stay engaged longer.

- **Monthly** plans come out on top for **Lifestyle** apps.

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US subscriptions show balanced long-term value across plan durations
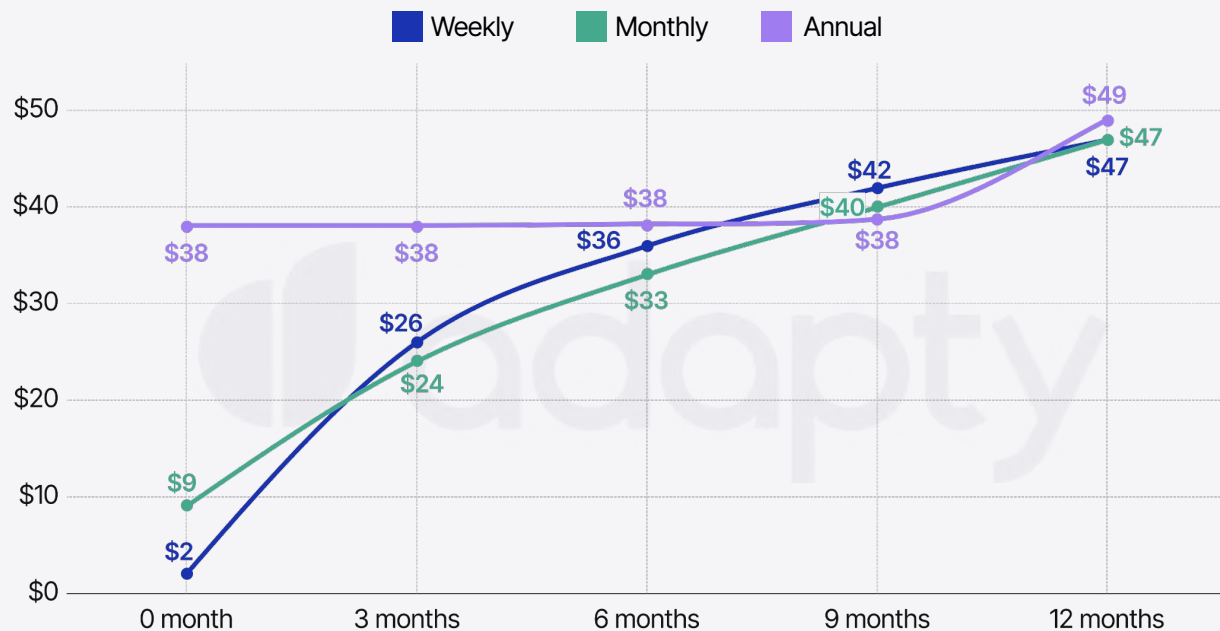
Subscription LTV by duration in the **US**

- By month 12, all plans intersect around $47-49 in LTV, with **annual** plans slightly ahead.

- Growth slows down after month 9 for every plan type.

- **Weekly** plans rise quickly, pass annual plans around month 6, then slow down.

In **Europe**, **annual** plans surpass weekly and monthly LTV by month 12

Subscription LTV by duration in **Europe**

Legend: Weekly · Monthly · Annual
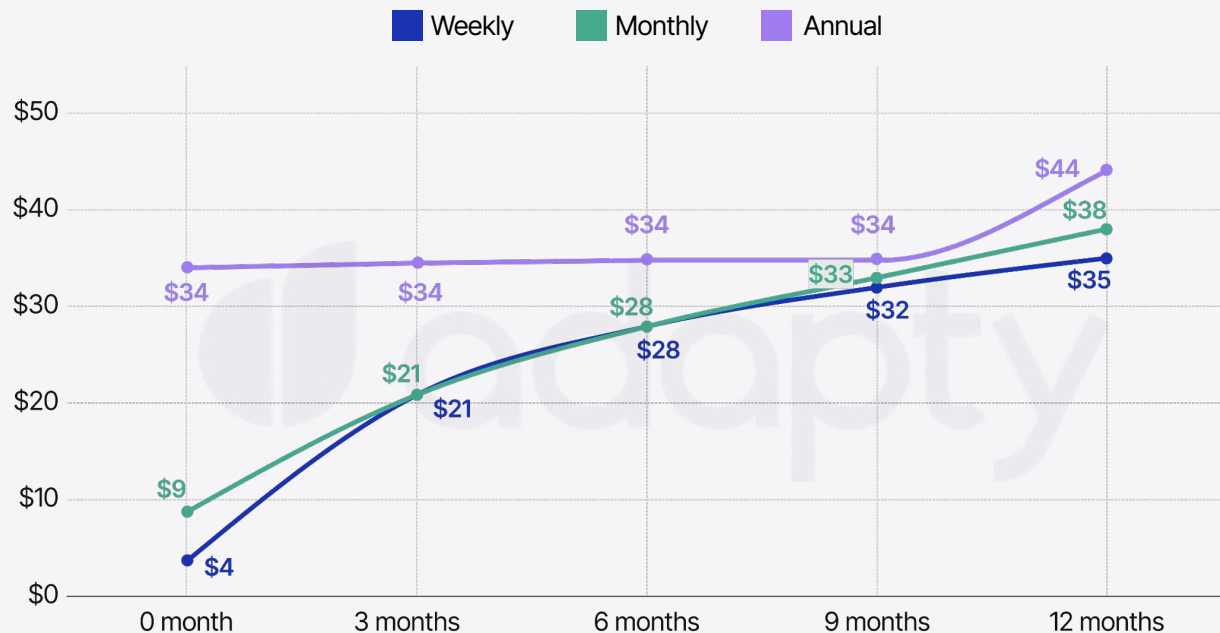
- **Annual** plans lead by month 12 with an LTV of $44.

- **Weekly** plans grow faster initially, but **monthly** plans overtake them after month 3 and end up with a higher LTV.

Weekly plans deliver the highest LTV in **LATAM**, outperforming **annual** plans

Legend: Weekly — Monthly — Annual

Chart values by duration:

Duration	Weekly	Monthly	Annual
0 month	$2	$5	$29
3 months	$21	$14	$29
6 months	$27	$19	$29
9 months	$31	$23	$29
12 months	$34	$26	$35

Subscription LTV by duration in **LATAM**

- **Weekly** subscriptions outperform both monthly and annual plans.

- **Monthly** plans grow steadily, but only modestly.

- The small gap between **weekly** and **annual** LTV suggests **LATAM** users prefer lower-commitment plans.

Annual subscriptions deliver the highest 12-month LTV in **APAC**
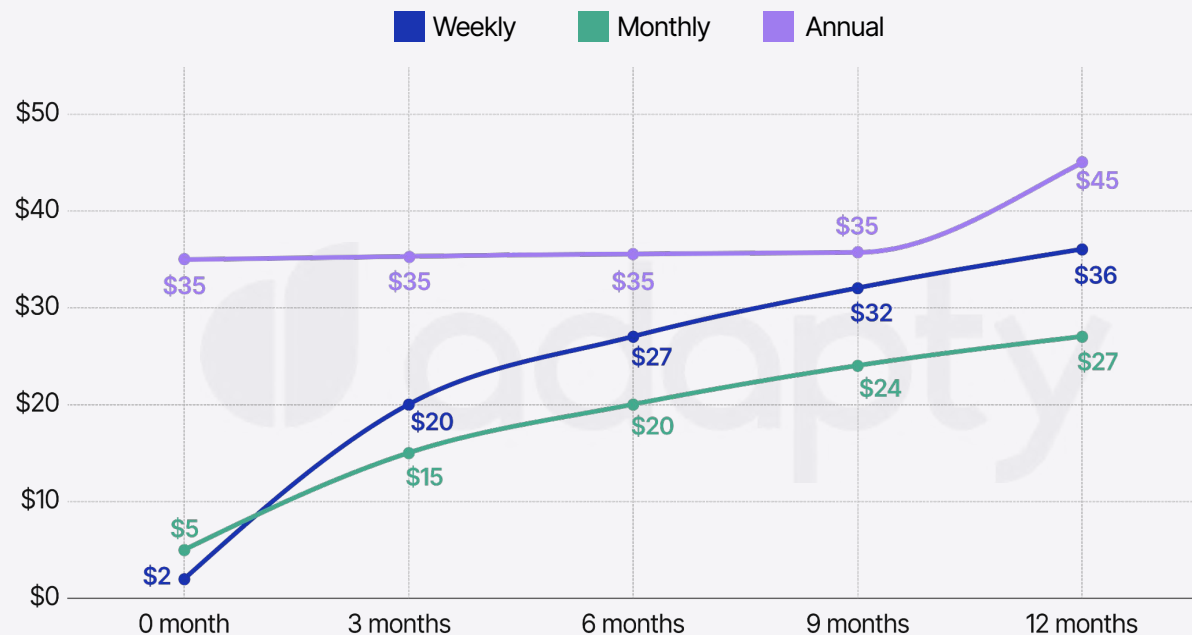
Subscription LTV by duration in **APAC**

- **Annual plans** lead in the region.

- **Weekly plans** ramp up quickly, growing fast in the first three months and finishing only $9 below annual.

- **Monthly plans** show the slowest, hinting at price sensitivity or lower retention.

Weekly and **annual** plans reach the same LTV in **MEA**, but get there differently
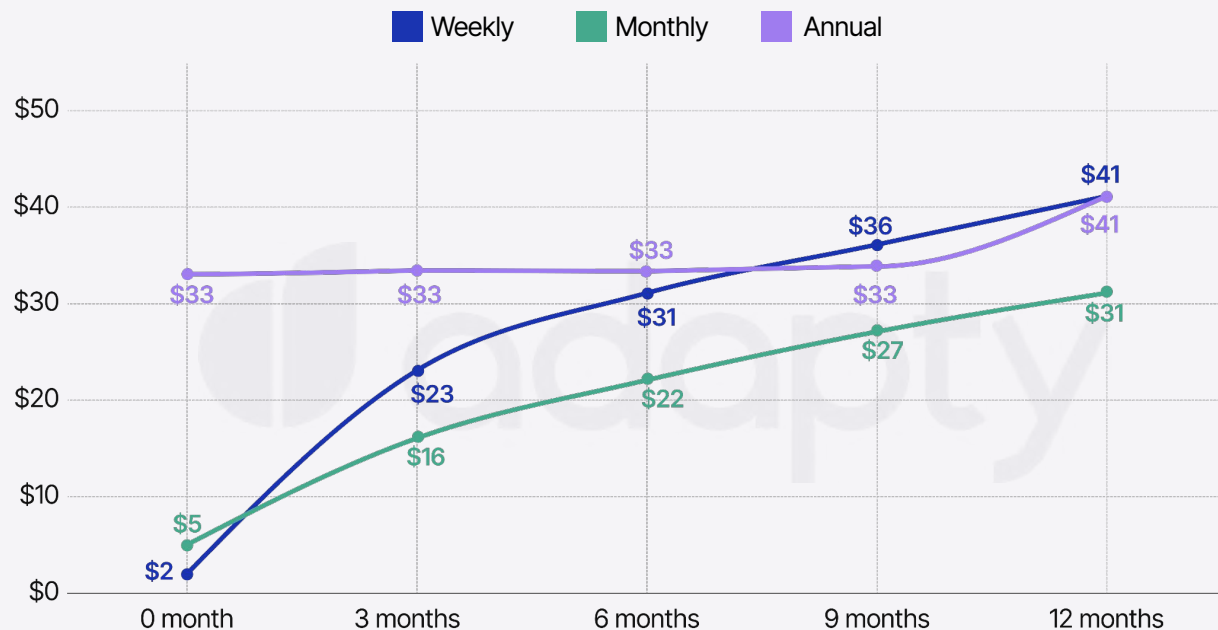
Subscription LTV by duration in **MEA**

- **Weekly** and **annual** plans both hit $41 by month 12.

- **MEA** users seem more responsive to short-term plans; **weekly** plans' LTV nearly doubles after the first quarter.

- **Monthly** plans grow more slowly and steadily than weekly ones.

Yearly plans don't just lift LTV, they fund your growth

"

For apps growing through paid UA, faster payback means faster reinvestment.

To convert >90% of users to yearly (12M) plans and boost CVR, test these 5 tactics:

1. **Reduce trial anxiety.**
   Heavily promote trial reminders to ease concerns. Check Blinkist advanced paywall setup.

2. **Preselect the 12M plan.**
   Show multiple options ("View all plans"), but only offer a trial on the annual plan.

3. **Frame monthly pricing, hide the total.**
   Present 12M as a monthly breakdown, making it the best-value choice with a nudge.

4. **Use a decoy plan.**
   Add a less attractive option to make the 12M plan feel like a no-brainer.

5. **Offer a discount after install,**
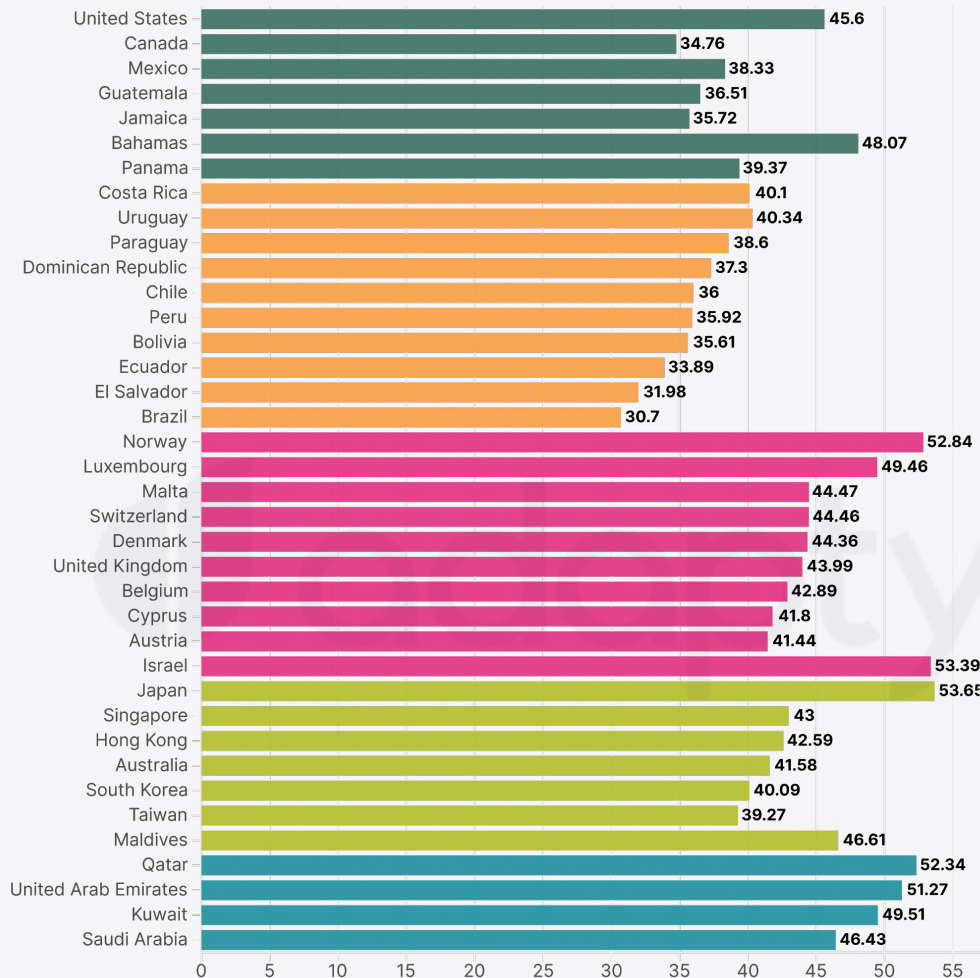   such as on a secondary paywall during onboarding or after a trial cancellation.

Marcus Burke
Meta Ads & App
Growth Consultant

12-month LTV peaks in smaller markets, not just the global giants

- The **US** leads North America, while the **Bahamas** and **Panama** top Latin America and the Caribbean.

- In Asia-Pacific, **Singapore** and **Hong Kong** outpace many larger markets, emphasizing the strong LTV potential of niche, high-income audiences.

- In the Middle East, **Qatar,** the **UAE,** and **Kuwait** rival top Western markets, signaling high spending power in the region.

| Country	Value
United States	45.6
Canada	34.76
Mexico	38.33
Guatemala	36.51
Jamaica	35.72
Bahamas	48.07
Panama	39.37
Costa Rica	40.1
Uruguay	40.34
Paraguay	38.6
Dominican Republic	37.3
Chile	36
Peru	35.92
Bolivia	35.61
Ecuador	33.89
El Salvador	31.98
Brazil	30.7
Norway	52.84
Luxembourg	49.46
Malta	44.47
Switzerland	44.46
Denmark	44.36
United Kingdom	43.99
Belgium	42.89
Cyprus	41.8
Austria	41.44
Israel	53.39
Japan	53.65
Singapore	43
Hong Kong	42.59
Australia	41.58
South Korea	40.09
Taiwan	39.27
Maldives	46.61
Qatar	52.34
United Arab Emirates	51.27
Kuwait	49.51
Saudi Arabia	46.43

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Trials consistently boost LTV: **US** & **Europe**

US

- With trial
- Without trial

Values (With trial): $0, $33.1, $42.8, $48.9, $56.3
Values (Without trial): $15.9, $22.9, $26.9, $29.6, $34.4

X-axis: 0 month, 3 months, 6 months, 9 months, 12 months
Y-axis: $0, $20, $40, $60

Europe

- With trial
- Without trial

Values (With trial): $0, $29.7, $36.6, $41.2, $47.4
Values (Without trial): $15.5, $20.7, $23.9, $26.3, $30

X-axis: 0 month, 3 months, 6 months, 9 months, 12 months
Y-axis: $0, $20, $40, $60

Subscription LTV by trial status

- **US**: Trials lift 12-month LTV by 64%, the largest gain observed.
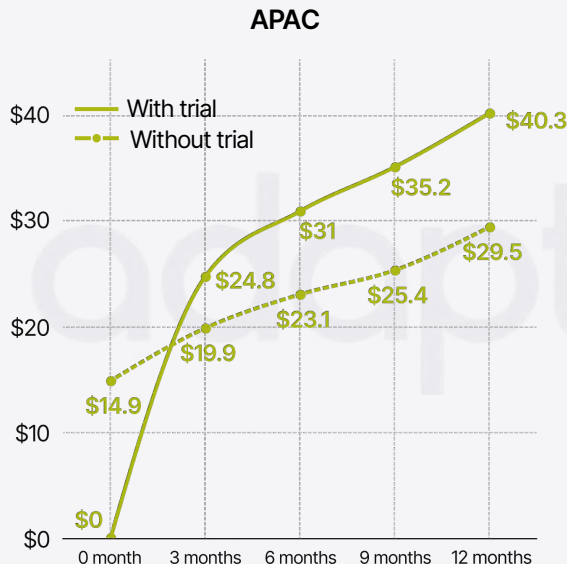
- **Europe**: Trials boost 12-month LTV by 58%.

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35

Trials consistently raise LTV across all regions: **LATAM**, **APAC** & **MEA**
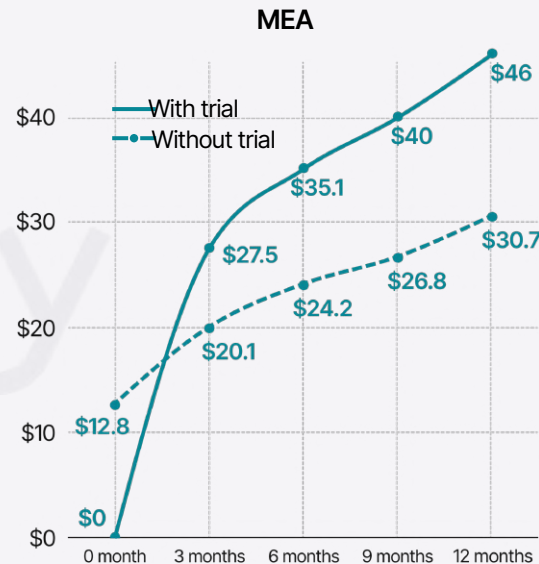
Subscription LTV by trial status
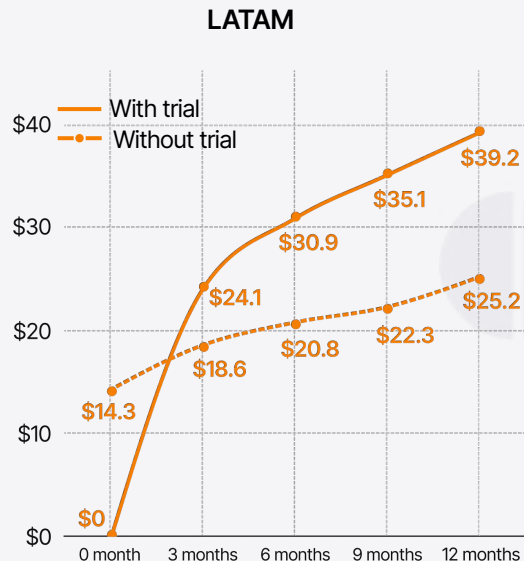
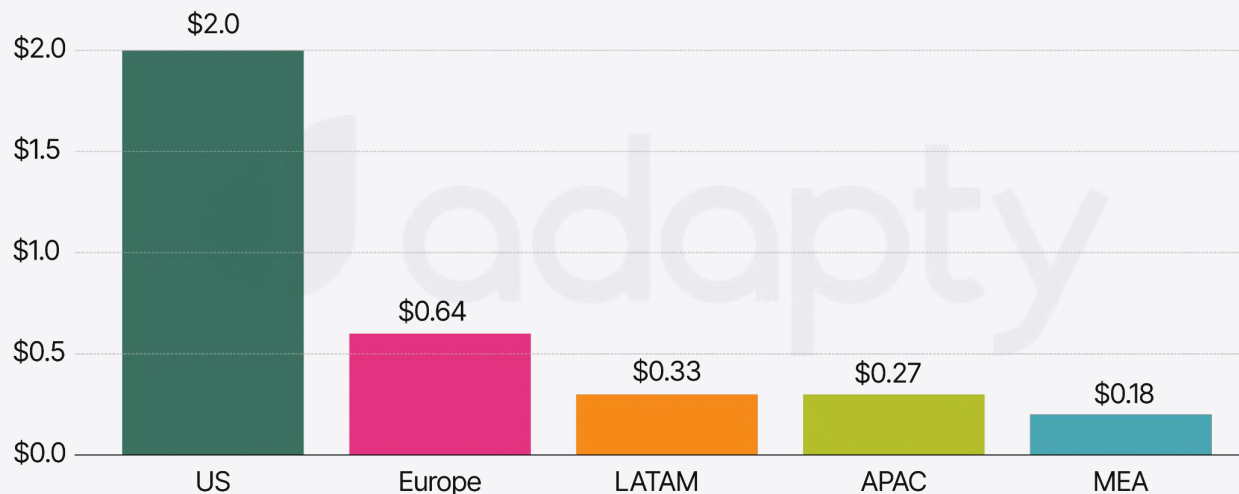**LATAM:** Even in lower-priced markets, trials boost value by 55%.

APAC: The gap is smaller, but still meaningful at 26%.

MEA: Trials deliver a 46% gain in LTV.

US installs bring in 3-4x more revenue than most other regions

$2.0

$2.0

$1.5

$1.0

$0.64

$0.5

$0.33

$0.27

$0.18

$0.0

US   Europe   LATAM   APAC   MEA

12-month install LTV by region

- In the **US**, install LTV* reaches $2, driven by a 4.54% conversion rate and spend per payer of $43.64.

- **Europe** sees similar outcomes (~$0.6 per install), despite slightly lower conversion rates.

- **LATAM, APAC,** and **MEA** lag behind, with install LTVs under $0.35. This is mainly because fewer users convert, not because payers spend less.

* Install LTV measures the revenue an average new install generates over 12 months, combining conversion rate and spend per payer.

✦ adapty

Weekly plans deliver the highest trial LTV in every region
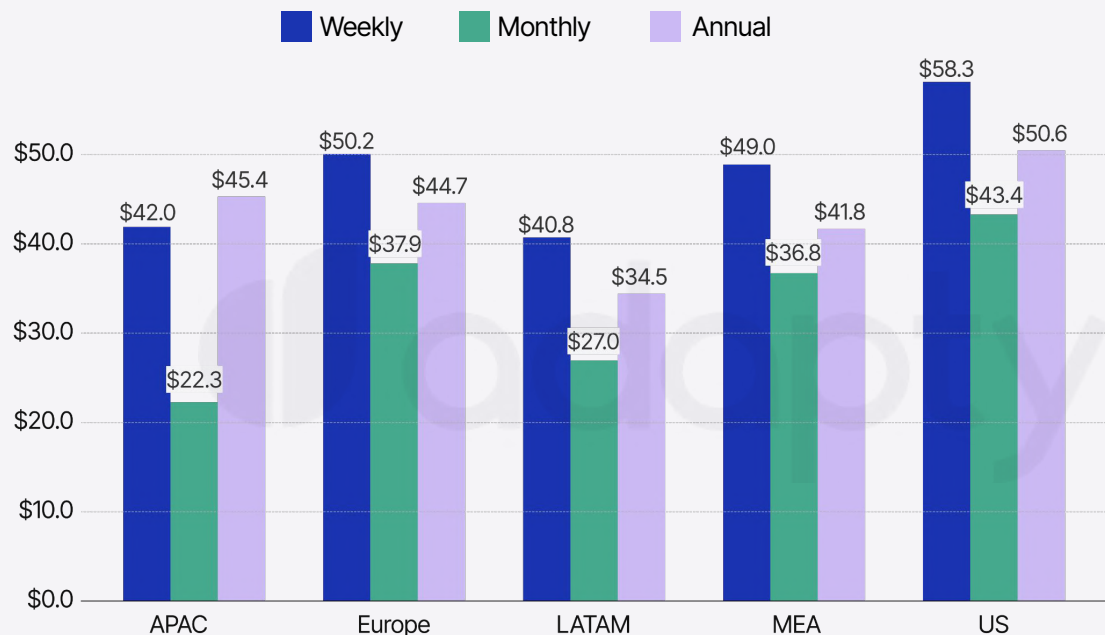
12-month trial LTV by region and plan type

- Across regions, **weekly** plans top trial LTV*, reaching $58.3 in the US and $50.2 in Europe.

- **Annual** plans rank second, still posting strong trial LTV.

- **Monthly** plans consistently record the lowest trial LTV in all regions.

Premium-priced plans consistently drive stronger LTV, especially in the **US**
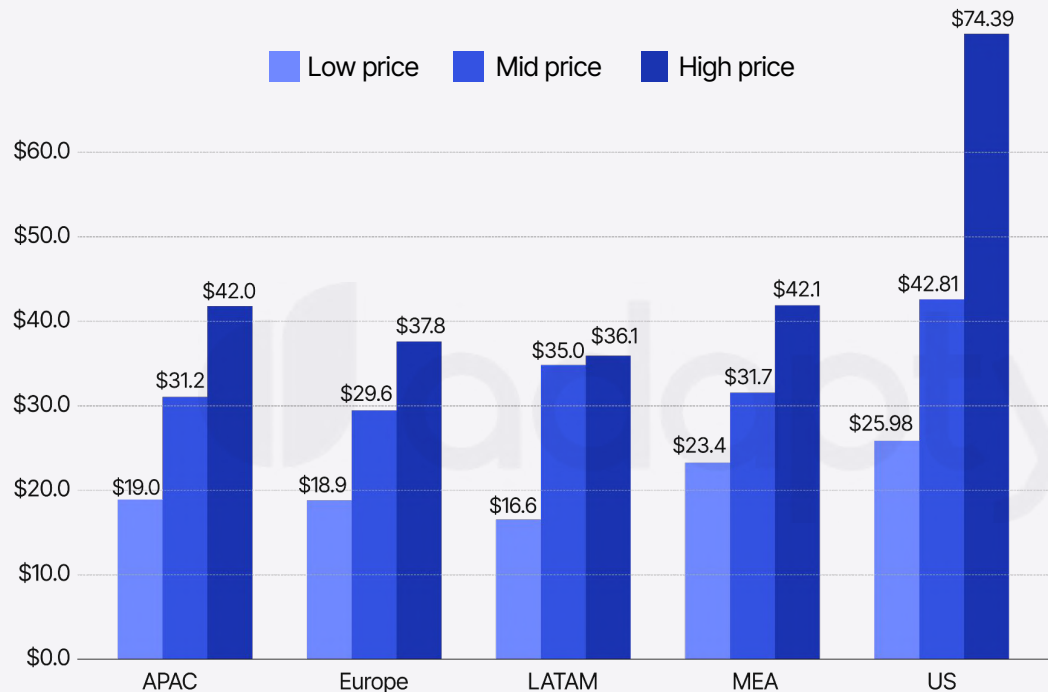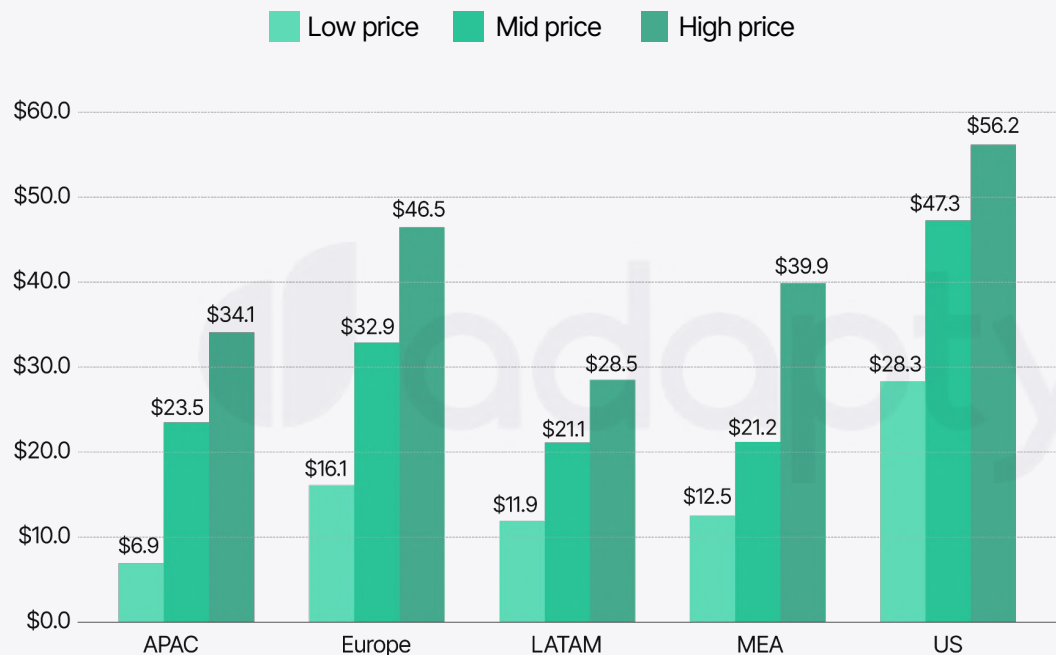

Weekly subscription LTV by price tier and region

- The **US** leads in every category, with high-priced plans generating $60-74 in LTV, versus $16-28 in lower tiers.

- **Europe** follows closely, showing a strong LTV lift as prices rise.

- **LATAM** and **APAC** show the same upward trend, but the LTV gap between low and high price tiers is smaller.

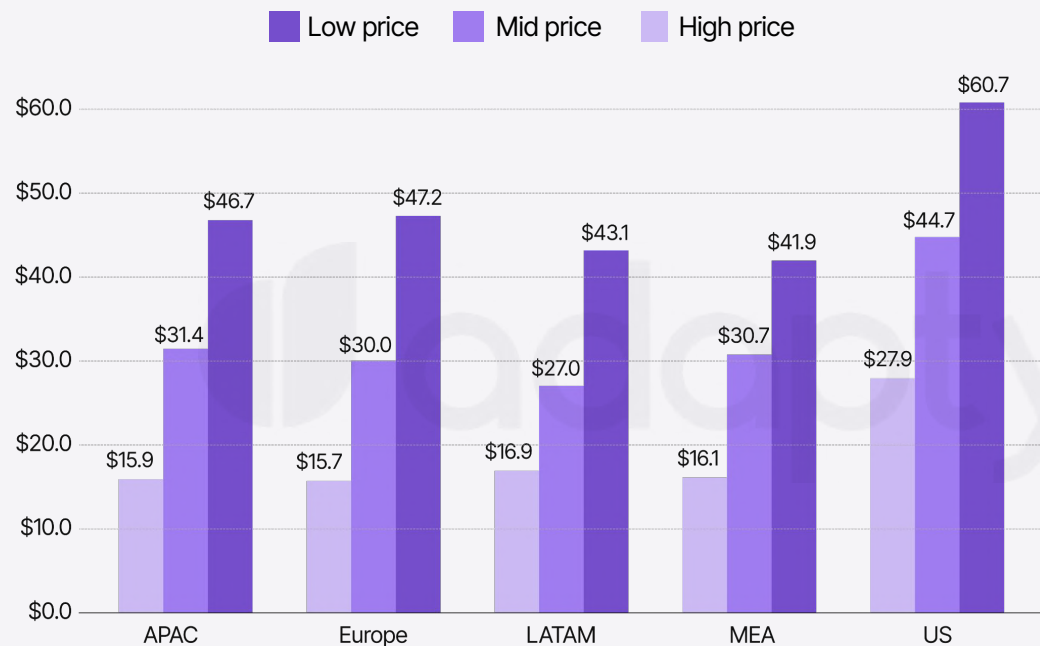Tiers defined by price quartiles: low = 25%, mid = 50%, high = 75%

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Monthly LTV grows with price, especially in the **US**

Monthly subscription LTV by price tier and region

Legend: Low price, Mid price, High price

- Higher-priced monthly subscriptions consistently deliver stronger lifetime value across all regions.

- The **US** leads the trend, with high-tier plans reaching $56.2, followed by **Europe** at $46.5.

- **APAC**, **LATAM**, and **MEA** show similar patterns, though with narrower gaps between price tiers.

adapty

Annual LTV climbs steadily with price, and the **US** leads the way

Legend: ■ Low price ■ Mid price ■ High price

Chart data — Annual subscription LTV by price tier and region:

Region	High price	Mid price	Low price
APAC	$15.9	$31.4	$46.7
Europe	$15.7	$30.0	$47.2
LATAM	$16.9	$27.0	$43.1
MEA	$16.1	$30.7	$41.9
US	$27.9	$44.7	$60.7

Annual subscription LTV by price tier and region

- Across all regions, higher-priced annual plans consistently deliver stronger lifetime value.

- In the **US**, high-tier subscriptions reach $60.7, followed by **Europe** at $47.2 and **LATAM** at $43.1.

- Emerging markets show a similar trend, though with narrower LTV gaps between tiers.

adapty

When done right, LTV can inform our CAC targets and help prioritize markets, channels, and user segments

" LTV is a critical metric in mobile app growth. But to truly unlock its value, you need to look beyond the averages. Here's how:

1. We tend to attribute LTV differences by market to the purchasing power. But there are other aspects that might be causing the friction. For example, while subscriptions perform well in markets where recurring payments are culturally accepted, cheaper lifetime purchases are more appealing in price-sensitive regions. If you have many active non-paying users outside of the Tier-1 markets, "internationalise" your monetization strategy based on user habits and expectations. Monitor how it shifts your conversion rates, LTVs, and LTV-based revenue.

2. Offering a free trial and converting more trialists doesn't only bring you short-term conversion wins. It influences the cLTV and revenue distribution too.

By increasing the number of users who opt in for trials, you hopefully increase the number of high-intent users that convert at a full price. And, thus, decrease your need for fallback conversion tactics like heavy discounts. Make sure to test the trial offer and how you promote it (e.g., paywall copy and design) to get higher-LTV cohorts.

3. Subscription lengths have a strong impact on LTV, but be careful with offering the plans based on the LTV benchmarks alone. While weekly plans are common in some categories, they can be perceived as misleading in verticals like Health & Fitness or Education. Because this is where users come to build a long-term habit or get a new skill, which takes time.

Align your monetization strategy with the user's goals to not hurt the retention and user satisfaction. And offer plans that suit the user's need and "job", not just the ones with the highest LTV on paper.

Ekaterina Gamsriegler
Leading Growth & Marketing, MyGroove (a Red Bull company)

Build a smart acquisition strategy with real-time LTV insights

Adapty gives you instant access to actual and predicted LTV, helping you make faster, smarter decisions.

- Optimize paywalls, trials, and pricing in less time

- Adjust CAC and budgets based on real revenue data

- Break down LTV by user group, paywall, or A/B test

- See predicted LTV directly in A/B tests to choose the best-performing variant faster

Book a demo

Cohorts [by renewals] [by days]

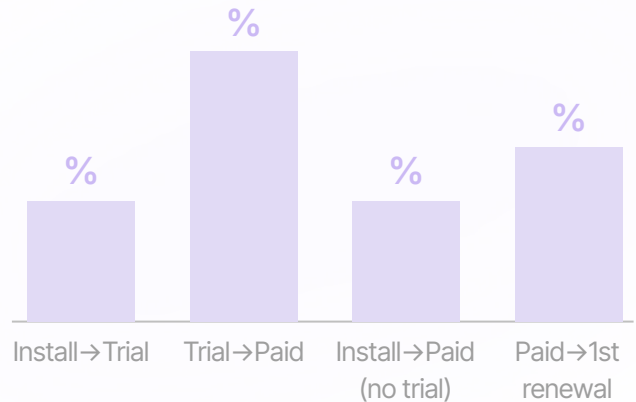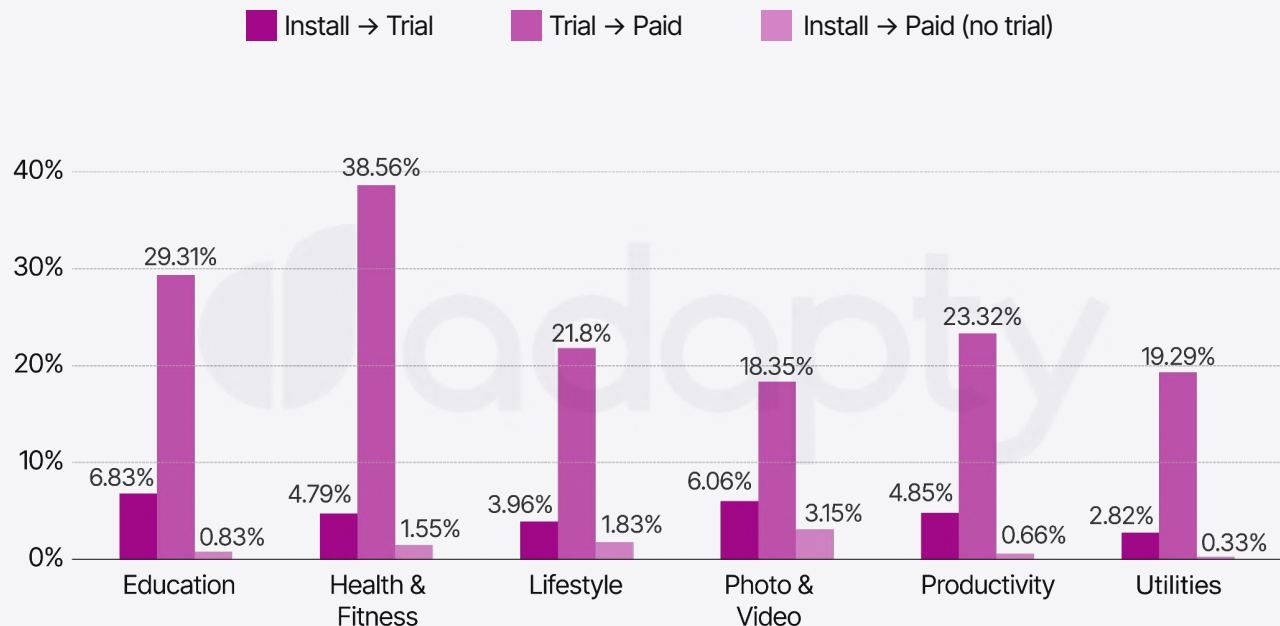|	P2	P3	P3	P4	✦Predicted revenue	✦Predicted LTV
Dec 22	$32	$48	$8	$2	$10K	$120
Jan 22	$12	$18	$7		$8K	$80
Feb 22	$0	$4			$2K	$40

LTV

$21.10

🍃 adapty
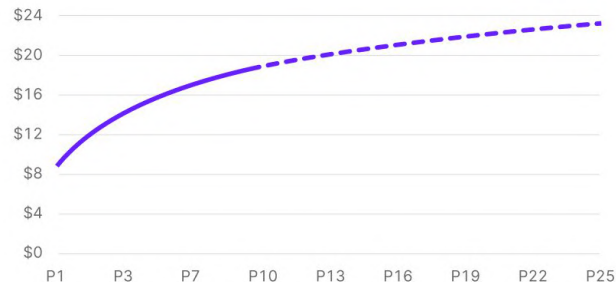
Conversion benchmarks

Where do users drop off and what gets them to commit?

See how conversion rates vary by app category, subscription type, pricing tier, and trial setup.
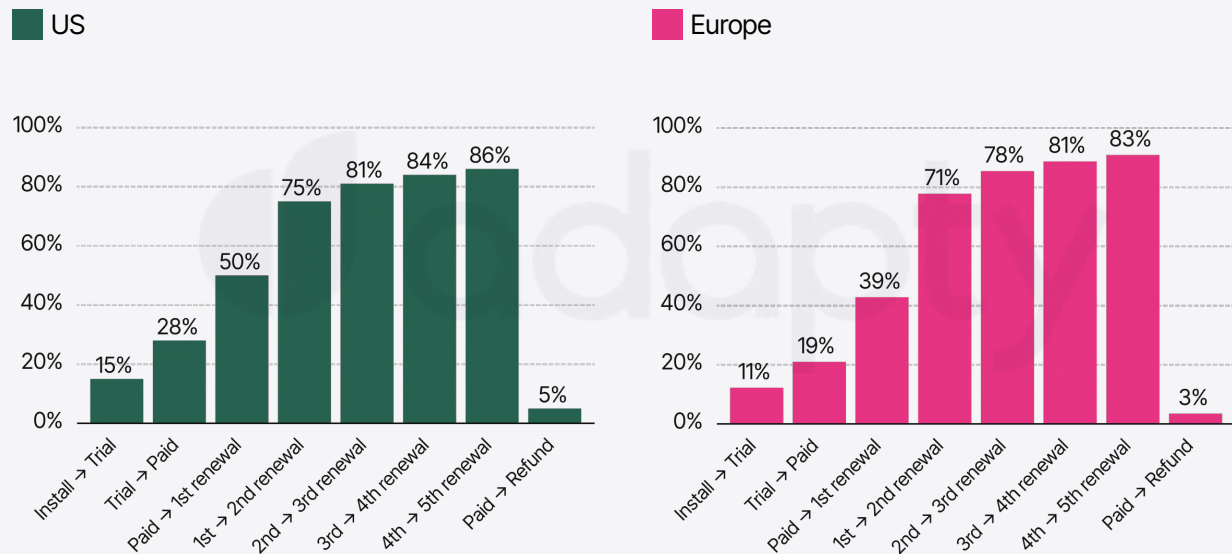
Free trials often convert better than direct purchases

Conversion rates by funnel and app category

Legend:
- Install → Trial
- Trial → Paid
- Install → Paid (no trial)

Education: 6.83%, 29.31%, 0.83%
Health & Fitness: 4.79%, 38.56%, 1.55%
Lifestyle: 3.96%, 21.8%, 1.83%
Photo & Video: 6.06%, 18.35%, 3.15%
Productivity: 4.85%, 23.32%, 0.66%
Utilities: 2.82%, 19.29%, 0.33%

- In many categories, trials drive 2-3x more paid users than showing the paywall upfront.

- In Lifestyle and Photo & video apps, direct paywalls still perform better.

Retention improves after conversion, but early drop-off still hurts growth

US

Stage	%
Install → Trial	15%
Trial → Paid	28%
Paid → 1st renewal	50%
1st → 2nd renewal	75%
2nd → 3rd renewal	81%
3rd → 4th renewal	84%
4th → 5th renewal	86%
Paid → Refund	5%

Europe

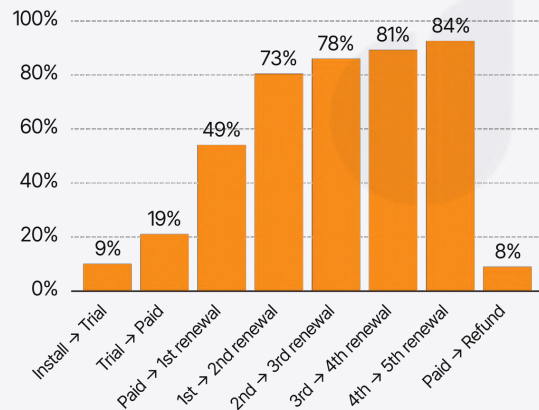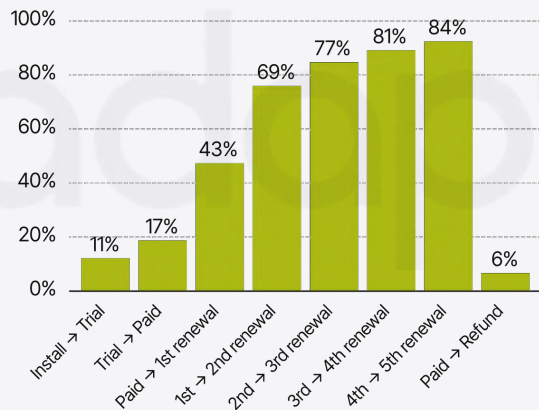| Stage	%
Install → Trial	11%
Trial → Paid	19%
Paid → 1st renewal	39%
1st → 2nd renewal	71%
2nd → 3rd renewal	78%
3rd → 4th renewal	81%
4th → 5th renewal	83%
Paid → Refund	3%

Conversion funnel by region and renewal stage

- The **US** leads on both trial-to-paid conversion (28%) and late-stage retention, with 86% of paying users renewing from period 4 to 5.

- **Europe** has the lowest refund rate, with just 3% of users requesting a refund.

- Early-stage drop-off remains the key challenge: install-to-trial rates are under 12% in most regions. But once users convert, retention is strong: 70-84% across renewals.

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Retention improves after conversion, but early drop-off still hurts growth

LATAM

Stage	Value
Install → Trial	9%
Trial → Paid	19%
Paid → 1st renewal	49%
1st → 2nd renewal	73%
2nd → 3rd renewal	78%
3rd → 4th renewal	81%
4th → 5th renewal	84%
Paid → Refund	8%

APAC

Stage	Value
Install → Trial	11%
Trial → Paid	17%
Paid → 1st renewal	43%
1st → 2nd renewal	69%
2nd → 3rd renewal	77%
3rd → 4th renewal	81%
4th → 5th renewal	84%
Paid → Refund	6%

MEA

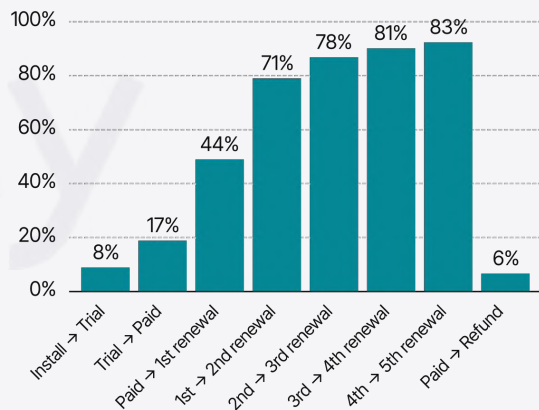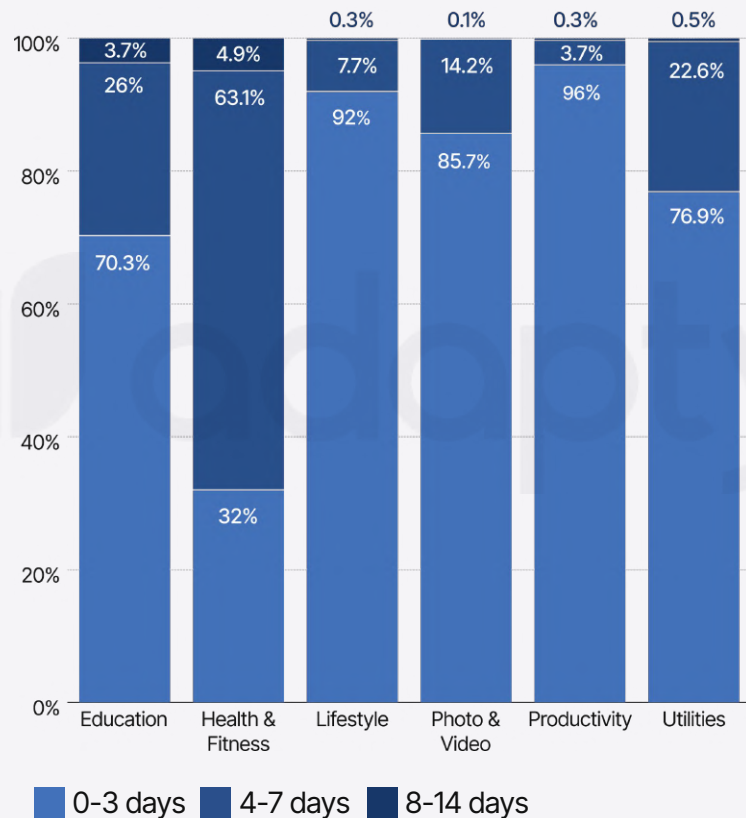| Stage	Value
Install → Trial	8%
Trial → Paid	17%
Paid → 1st renewal	44%
1st → 2nd renewal	71%
2nd → 3rd renewal	78%
3rd → 4th renewal	81%
4th → 5th renewal	83%
Paid → Refund	6%

Retention improves steadily after the first renewal in most regions. Users who stay beyond the initial period regardless of plan duration tend to keep renewing.

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Short trials dominate most app categories, but longer ones remain common in **Health & Fitness** and **Education**

- Most apps stick with 0-3 day trials, especially in **Productivity**, **Lifestyle**, and **Photo & Video**.

- **Health & Fitness** has the highest share of 4-7 day trials, while **Education** offers a more balanced mix, with over a quarter of apps offering mid-length trials

- Long trials are rare. 8-14 day trials make up less than 5% in every category, suggesting the payoff may not justify the longer wait for conversion.

Trial duration distribution by category

Education: 70.3%, 26%, 3.7%
Health & Fitness: 32%, 63.1%, 4.9%
Lifestyle: 92%, 7.7%, 0.3%
Photo & Video: 85.7%, 14.2%, 0.1%
Productivity: 96%, 3.7%, 0.3%
Utilities: 76.9%, 22.6%, 0.5%

■ 0-3 days ■ 4-7 days ■ 8-14 days

Third-party payments can boost margins, but only if users make it through the flow

" The new App Store rules are great news for US developers: you can drop in third-party payments and keep more of every sale.

But that freedom comes with a big to-do list. Suddenly you're in charge of everything – setting up payment accounts, locking down security, juggling card routing, handling chargebacks and refunds, and staying one step ahead of fraudsters. Slip up anywhere and you'll lose more than money; you'll lose users' trust.

So before you rush users from app to web (or back again), walk their path click by click. Where might they hesitate, mistype, or bail? Tighten those spots. Build a billing stack that's secure, modular, and instrumented with real-time alerts. Be brutally clear about fees and refund timelines. Catch failed payments before customers notice.

Get the flow and guardrails right, and the policy shift won't just save you Apple's cut, it'll earn repeat customers who feel safe spending with you.

Andrey Shakhtin
CEO, Funnelfox

Partner agencies

Trusted partners we work
with to help apps grow faster

appmasters

A mobile app marketing agency focused on cost-effective strategies to drive growth. Founded by Steve P. Young (host of the top app marketing YouTube channel), they work with chart-topping apps and startups alike. Services include ASO, monetization, and user acquisition.

AdQuantum

A performance marketing partner that helps grow mobile apps, games, and web projects through smart user acquisition across a range of verticals. Its proprietary creative studio, AdQuantum Design, produces high-performing ad creatives that boost campaign results and drive growth.

OTHERWAY AROUND

An AI-powered growth agency blending performance, ASO, and creative strategy to help apps scale sustainably. Known for their sharp execution and high-performing campaigns across all stages of the funnel.

aix

aix is a Tokyo-based ad tech company specializing in enabling global mobile applications to achieve sustainable growth in the Japanese and Korean markets. aix provides ASOindex, a proprietary app store optimization analytics platform, and Rocket A, a performance-driven CPI/CPE advertising solution engineered for market entry and user acquisition in Japan and Korea.

APERTURE

A growth agency helping apps scale through smart ad strategy. They've worked with brands like Your Juno and Mindful Mamas — cutting CAC by 77% and boosting install rates by 131%. Founded by Hannah Parvaz, named App Marketer of the Year.

appdna.ai

A strategic growth partner for subscription apps. Acting like an OS for your funnel, appdna.ai turns data patterns into actionable recommendations. With clear insights and full context, they help teams move faster across acquisition, retention, and monetization.
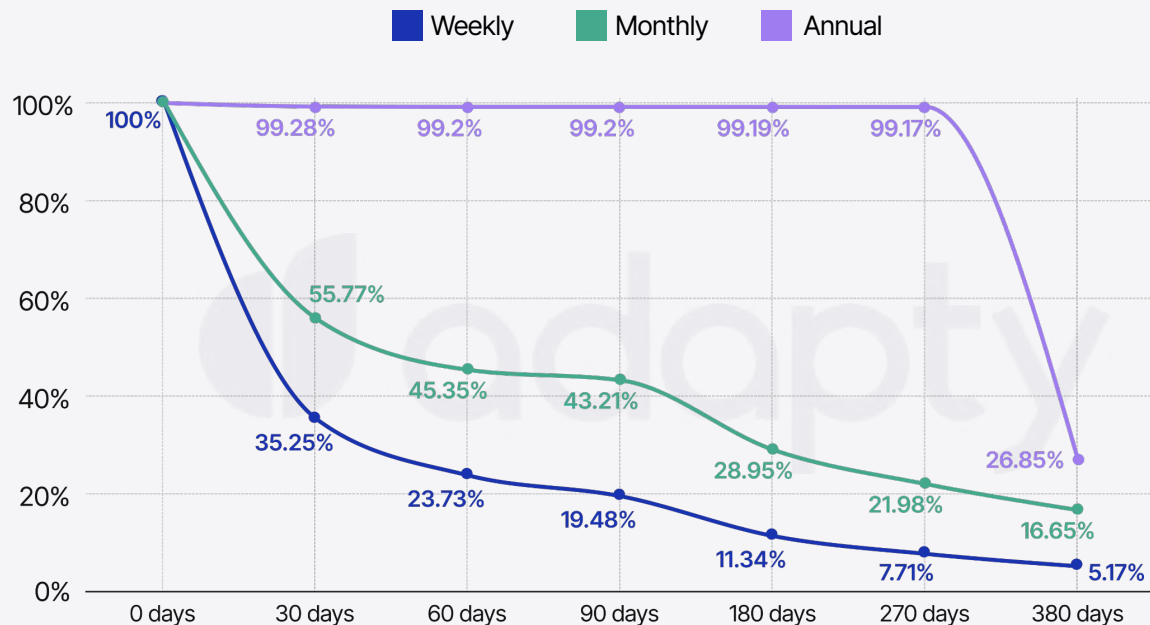
adapty

Retention and renewals

How long do app users stick around?

We break down subscription retention by plan type, trial use, price tier, and category to learn which strategies drive repeat payments.
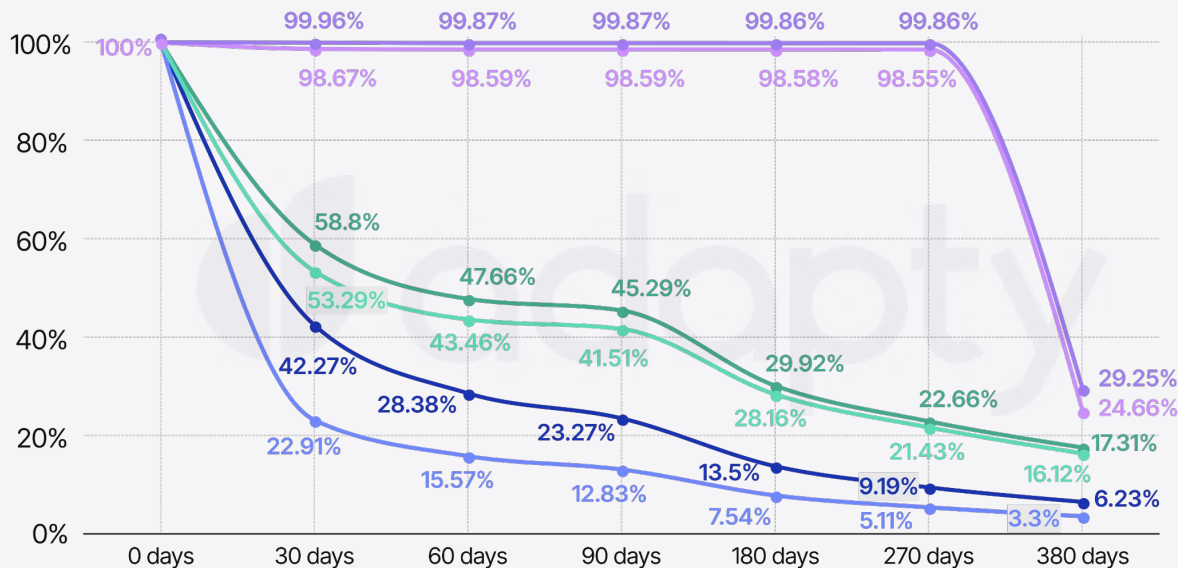
Retention

adapty
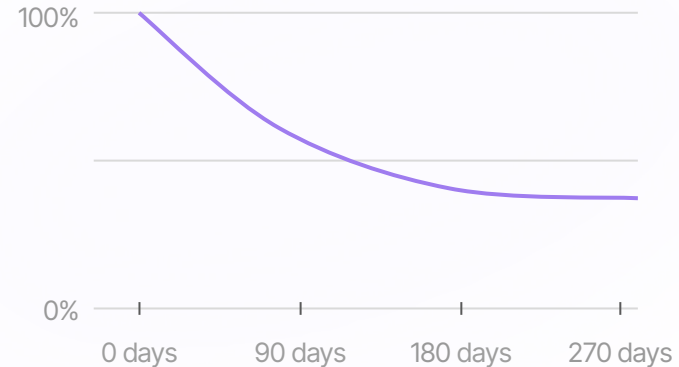
Weekly subscriptions show the sharpest drop-off, while **monthly** plans keep more users over time

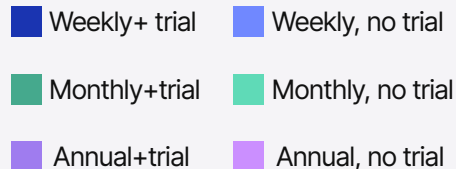User retention over time by subscription type

- **Weekly** plans churn fast: 65% of subscriptions end within the first 30 days, with only 5% renewed at day 380.

- **Monthly** plans perform better: 43% of subscriptions renew at day 90, and 17% stay active after a year.

- **Annual** plans retain almost all users through the year, but see a drop-off at renewal, showing that upfront commitment delays churn rather than prevents it.

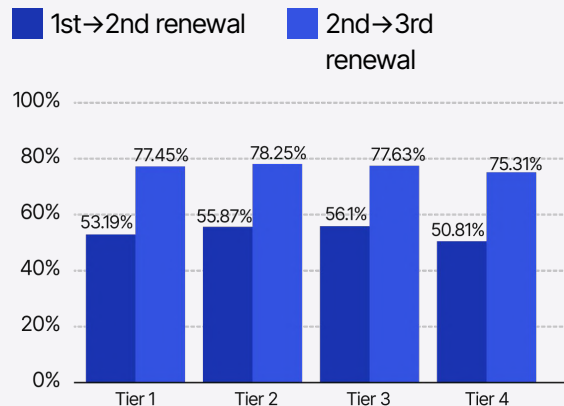# Trials lead to stronger retention, especially in short-term plans

Subscription retention with vs without trial

- Trials improve early retention most in **weekly** plans (42% with trial vs 23% without at day 30).

- **Monthly** plans see a modest lift from trials, with retention increasing ~6% relative to no-trial users by day 180.
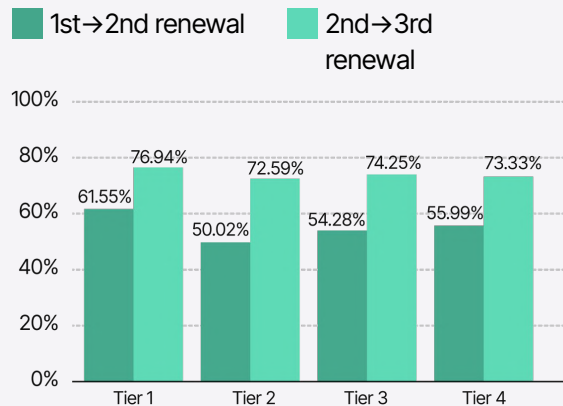
Legend:
- Weekly+ trial
- Weekly, no trial
- Monthly+trial
- Monthly, no trial
- Annual+trial
- Annual, no trial

Data points:

Annual+trial: 100%, 99.96%, 99.87%, 99.87%, 99.86%, 99.86%, 29.25%
Annual, no trial: 100%, 98.67%, 98.59%, 98.59%, 98.58%, 98.55%, 24.66%
Monthly+trial: 100%, 58.8%, 47.66%, 45.29%, 29.92%, 22.66%, 17.31%
Monthly, no trial: 100%, 53.29%, 43.46%, 41.51%, 28.16%, 21.43%, 16.12%
Weekly+ trial: 100%, 42.27%, 28.38%, 23.27%, 13.5%, 9.19%, 6.23%
Weekly, no trial: 100%, 22.91%, 15.57%, 12.83%, 7.54%, 5.11%, 3.3%

X-axis: 0 days, 30 days, 60 days, 90 days, 180 days, 270 days, 380 days
Y-axis: 0%, 20%, 40%, 60%, 80%, 100%

Lower prices don't always mean better retention

Weekly

■ 1st→2nd renewal ■ 2nd→3rd renewal

- Tier 1: 53.19%, 77.45%
- Tier 2: 55.87%, 78.25%
- Tier 3: 56.1%, 77.63%
- Tier 4: 50.81%, 75.31%

Monthly

■ 1st→2nd renewal ■ 2nd→3rd renewal

- Tier 1: 61.55%, 76.94%
- Tier 2: 50.02%, 72.59%
- Tier 3: 54.28%, 74.25%
- Tier 4: 55.99%, 73.33%

Annual

■ 1st→2nd renewal ■ 2nd→3rd renewal

- Tier 1: 30.93%, 45.08%
- Tier 2: 23.02%, 29.77%
- Tier 3: 21.18%, 23.79%
- Tier 4: 29.66%, 40.44%
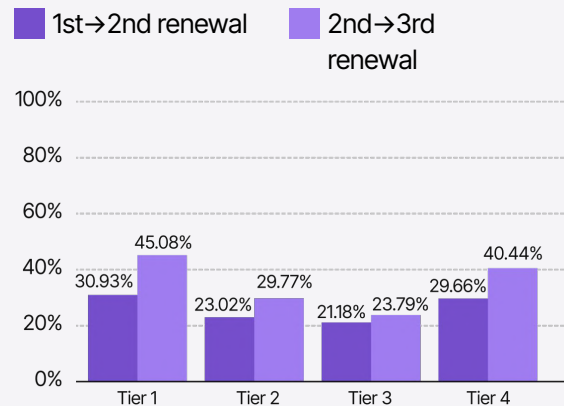
Annual plans show the strongest price sensitivity: tiers 2-3 underperform significantly, while tier 4 retains nearly as well as the cheapest tier.

Weekly and **monthly** plans are less affected by price, with strong second-renewal rates across all tiers.

Tiers are based on price quartiles: Tier 1 = lowest 25% of prices, tier 2 = 25-50% range, tier 3 =50–75% range, tier 4 = highest 25% of prices.

● adapty

Retention is the ultimate reality check. You can get the cheapest trials in the world, but if nobody stays, what's the point?

"

Weekly subscriptions show catastrophic retention. Around 75% drop off by day 30, and only 5% of users remain after one year.

If you're building something people will use once (like a utility or a time-sensitive tool) then weekly makes sense. It's a solid way to eke out a bit of revenue. No problem there. But if you're trying to build something long-term, it's risky. You're spending on acquisition, converting a lot up front, and losing almost everyone just as fast.

That's why the trial uplift on weekly plans really stands out. 42% retention at day 30 with a trial, vs. 23% without: that's almost double.

One of the most interesting signals in the whole report is that mid-priced annual plans are retaining worse than both cheap and premium tiers.

You'd expect a clean curve (higher price, more churn) but that's not the case. Higher prices retain better than mid prices, especially after year 1.

Does mid-tier pricing signal indecision? Possibly. If you can't justify why a tier exists, people won't commit to it. And yet, there's still heavy decay in annual plans across the board. Yes, annual pricing locks people in, but the same behavioural cliff still shows up. It just comes later.

Retention shouldn't be about duration. It should be about value moments that recur and compound.

The question isn't "How long can I keep them?" It's "How fast can I prove I'm worth keeping?" That's what separates sticky products from leaky ones.

Hannah Parvaz
Founder, Aperture

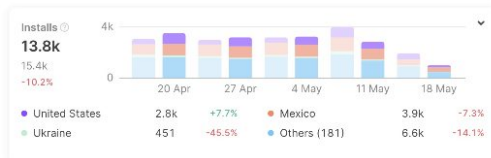# Know what's driving your revenue and what's holding it back

Real-time insights across ARPU, trials, churn, and more: all broken down by country, paywall, or cohort.
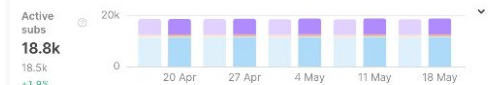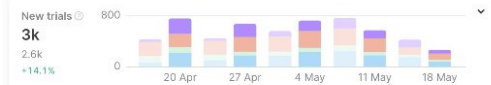
Book a demo
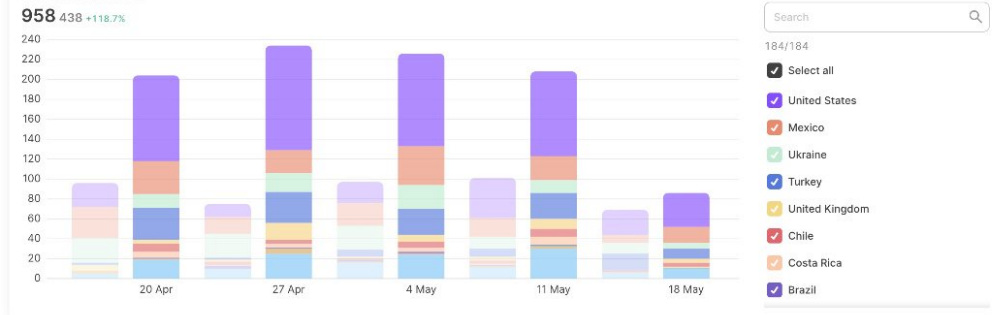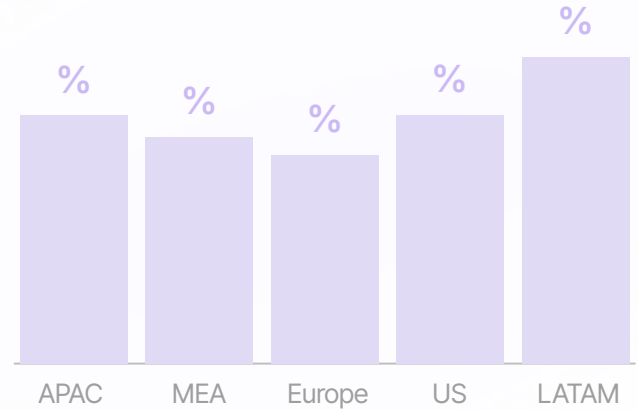
Refund trends

What do refunds reveal about user behavior?

See which plans, price points, and app categories have the highest refund rates. Use these insights to prevent churn.

APAC MEA Europe US LATAM

Refund rates increase with subscription length

- **Annual** plans show the highest refund rate (4.2%), hinting at unmet expectations or changing user needs.

- **Lifetime** and **monthly** plans fall in the middle (~3%), while weekly plans see the lowest refund rate (2.6%), suggesting users feel safer with short-term options.
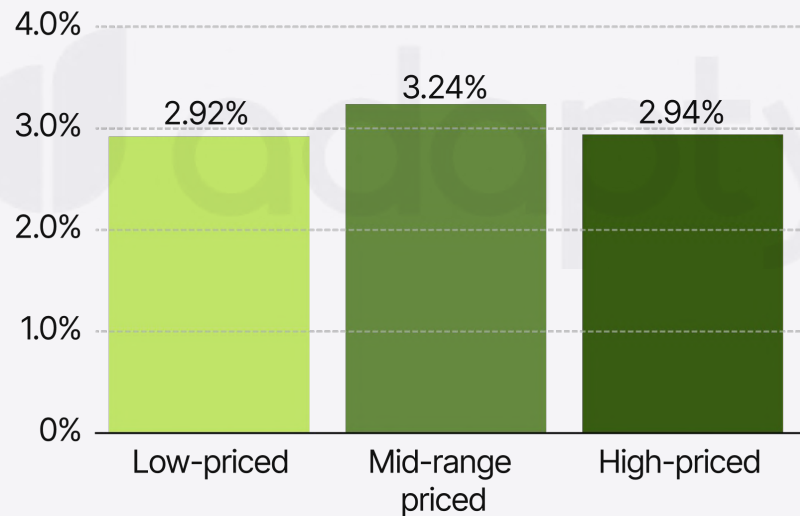
Refund rates by subscription duration

	Weekly	Lifetime	Monthly	Annual
Refund rate	2.56%	3.42%	3.02%	4.18%
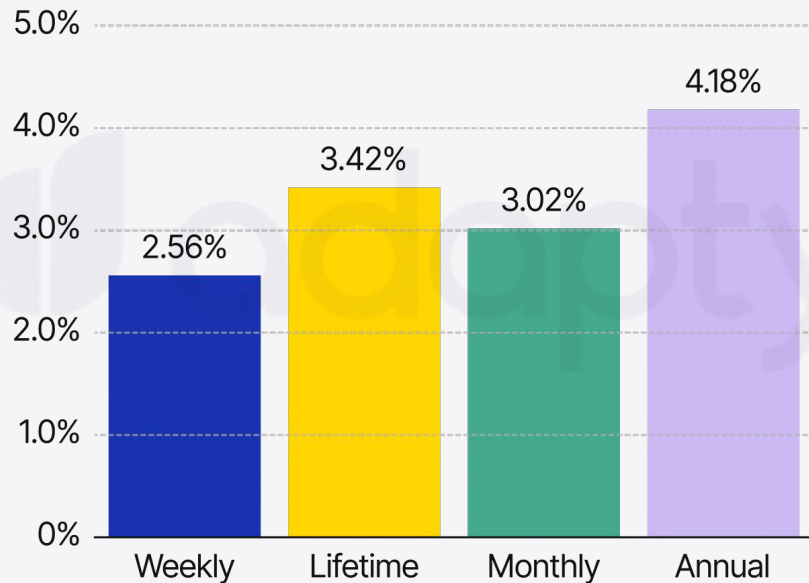
Refunds are highest
for mid-priced subscriptions

- **Mid-range** subscriptions show the highest refund rate (3.24%), slightly above the **low-** and **high-priced** tiers.

- **High prices** don't lead to more refunds. In fact, they perform just the same as the **low-priced** ones.

Refund rates by price tier

Bar chart showing refund rates: Low-priced 2.92%, Mid-range priced 3.24%, High-priced 2.94%. Y-axis ranges from 0% to 4.0%.

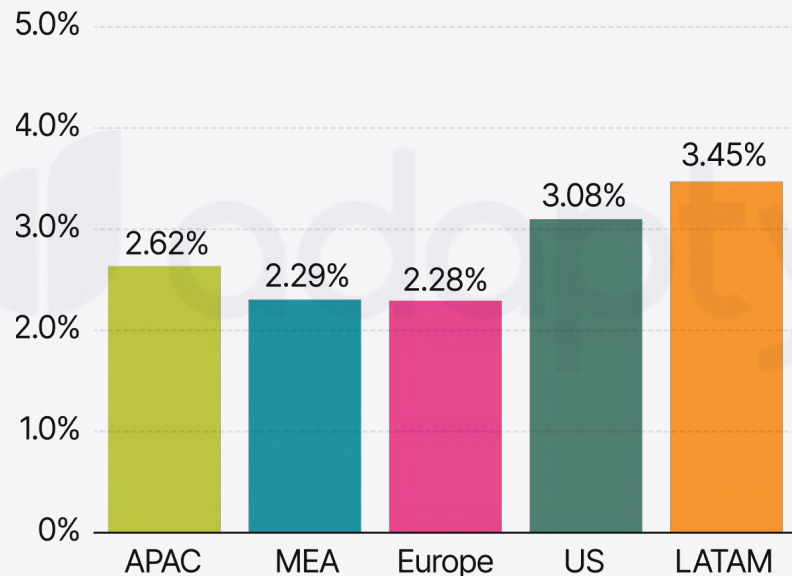# **LATAM** and the **US** see the highest refund rates across regions

- **LATAM** has the highest refund rate (3.45%), followed by the US (3.08%).

- **Europe** and **MEA** have the lowest refund rates, both around 2.3%.

Refund rate by region

Every moment after trial activation is a race to relevance

"

Refunds don't happen because your product is bad. They happen because your value shows up too late.

Longer commitments and fuzzy mid-range offers amplify buyer's remorse. Compress time-to-value: surface the 'aha' moment before the first renewal, ideally within the first five minutes.

Stop asking "How do we retain users for a year?" and start asking "How do we prove our worth in five minutes?"

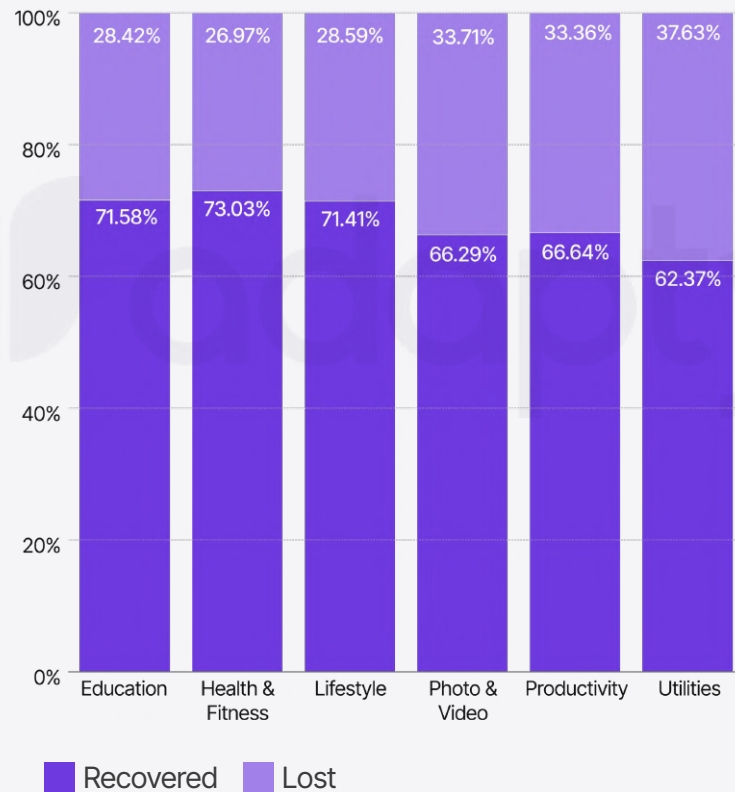Nail that window, and refunds will drop, no twelve-month retention hacks required.

Steve Young
Founder & CEO, App Masters

adapty

Refund Saver recovers up to 73% of refunds

- Adapty's Refund Saver helps reduce revenue loss by automatically handling refund requests from Apple.

- The tool recovers over 60% of refund value across all categories, with recovery rates above 70% in **Health & Fitness**, **Education**, and **Lifestyle**.

Refunds recovered by Adapty's Refund Saver

| Category	Lost	Recovered
Education	28.42%	71.58%
Health & Fitness	26.97%	73.03%
Lifestyle	28.59%	71.41%
Photo & Video	33.71%	66.29%
Productivity	33.36%	66.64%
Utilities	37.63%	62.37%

Recovered ■ Lost

adapty

Turn refunds into revenue in one click

- Save 3x more compared to apps without Refund Saver

- Cut your refund rate from day one, no code needed

Book a demo

Refund Rate

Adapty Refund Saver enabled

4.0%	
3.5%	
3.0%	
2.5%	
2.0%	
0%	

1 Feb   3 Feb   5 Feb   7 Feb   9 Feb   11 Feb
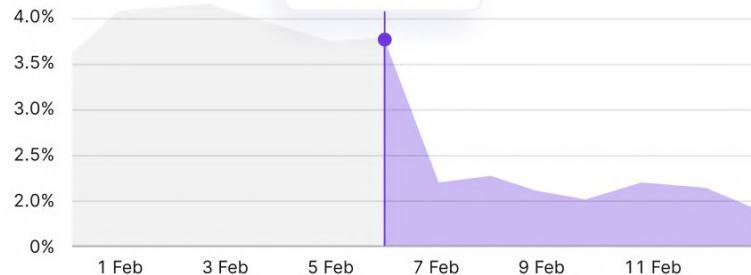
Refunds requested	Won back refunds
$123,167 (3,240)	$83,167 67.52% (2,708)

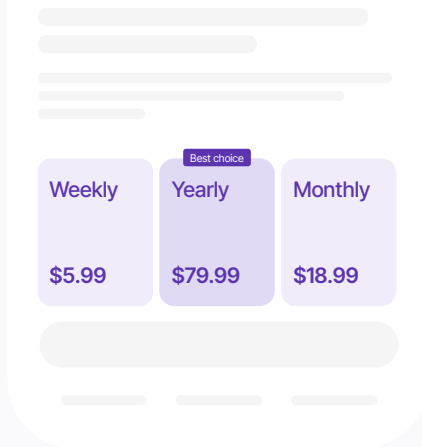| User ID	Status	Transaction_id	Product	Price
7acaa2e56-d4f...	REFUND DECLINED	TNr-87ef3b15...	Trial_instruction_v...	$16
fa8b211c3-64e...	REFUND DECLINED	TXN-3ac7df8...	Trial_instruction_v...	$12
d918wefd34-7e...	REFUND DECLINED	TXN-sdffe819...	Trial_instruction_v...	$7

A/B experiments and paywalls

What makes a paywall actually convert?

We analyzed thousands of A/B tests across top apps find out:

- what elements drive revenue

- what teams test most

- and how small changes impact big results
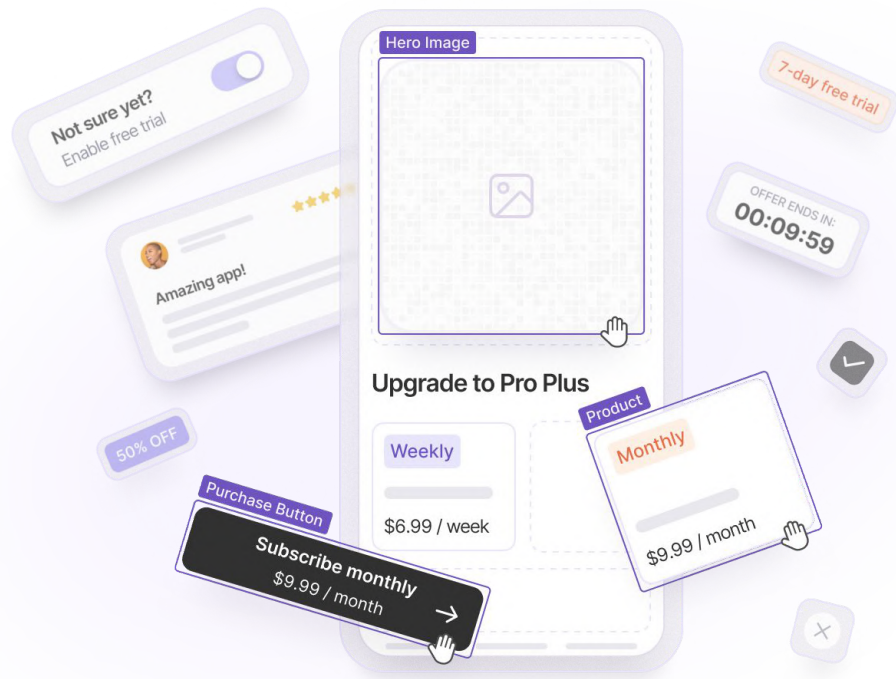
Top 3 paywall setups by LTV performance in the **US**

Best choice

Weekly	Yearly	Monthly
$5.99	$79.99	$18.99

00:09:59 LIMITED TIME OFFER

Just $5.99 per week

Not sure? Enable free trial
Auto-renewable, 3 days free

Best choice

Annual	$79.99
Weekly	$5.99

Paywalls offering all three plans (**weekly, monthly, yearly**) delivered the highest LTV.
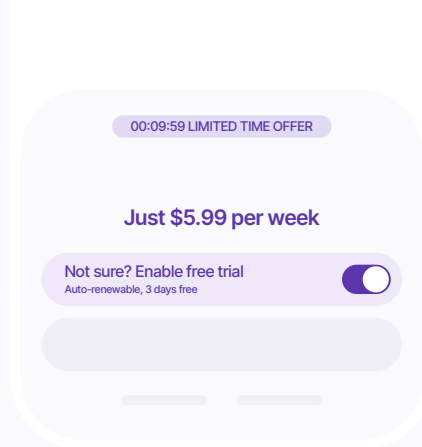
Straightforward **weekly** plans with short trials converted best.
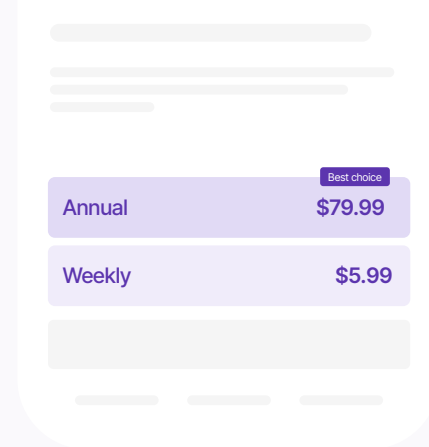
Annual + weekly combos created a clear upgrade path.

"Yearly by default" on your paywall might be hurting your LTV

" Yes, it's hard to beat the LTV of a yearly plan. And it's been a best practice to influence users to choose it over shorter duration plans (also for cashflow reasons). However, Adapty's data shows this is not the best paywall layout.

This is most likely because defaulting to yearly:

- Decreases the conversion rate since you're adding friction to choosing a shorter duration. Not everybody's willing to commit to a year! With a free trial, it might be your trial to subscription conversion that suffers
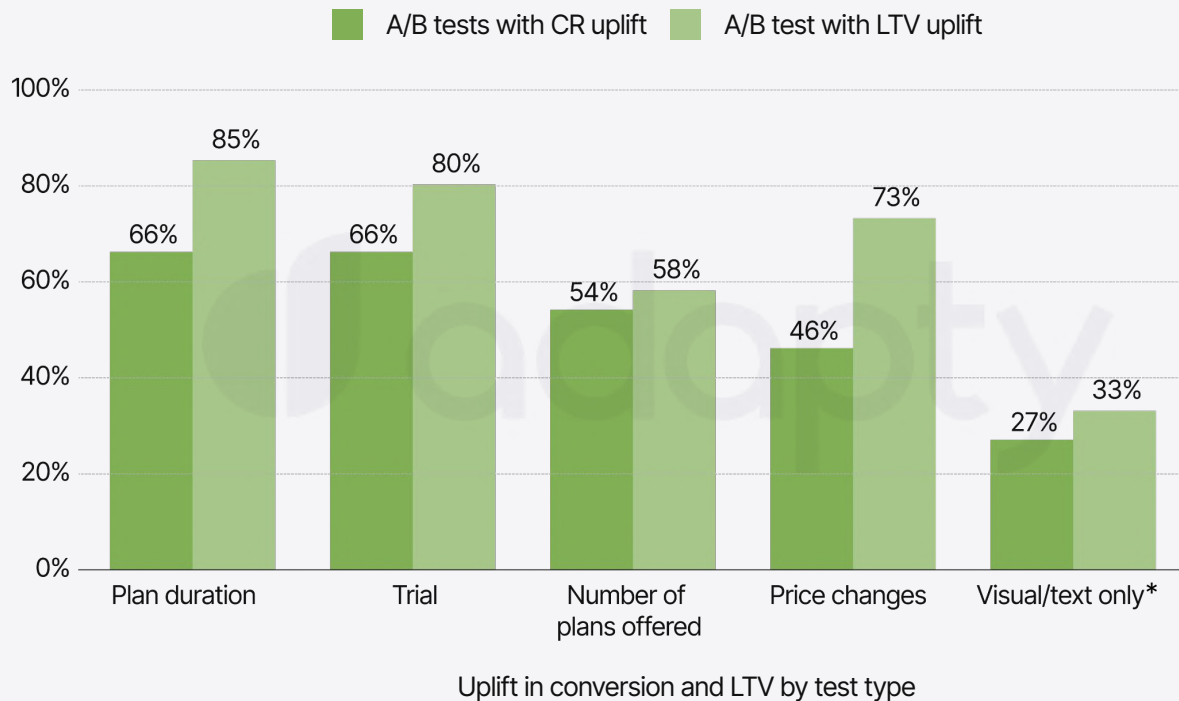
- Prevents you from effectively using price anchoring versus a shorter plan (weekly or monthly) by making it harder to convey savings for the yearly plan.

Don't overthink your paywall layout just yet. Instead, play around with the subscription mix you offer: plan durations and trials (length, no trial on some plans, etc.).

Sylvain Gauchet
Head of Growth, Reading.com

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Trial and duration tests are most likely to improve paywall performance

A/B tests with CR uplift   **A/B test with LTV uplift**

Chart data:

Test type	A/B tests with CR uplift	A/B test with LTV uplift
Plan duration	66%	85%
Trial	66%	80%
Number of plans offered	54%	58%
Price changes	46%	73%
Visual/text only*	27%	33%

Uplift in conversion and LTV by test type

- Start A/B testing paywalls with trial offers and plan durations. These are the tests most likely to lift both LTV and conversion.

- Once you've optimized those, experiment with pricing and the number of plans.

- Tweak visuals and text only after you've optimized pricing and structure.

* "Visual/text only" refers to tests that didn't change any pricing, plan structure, or trial offers – only the visual layout or copy of the paywall.

◆ adapty

Test and optimize paywalls without limits

Run any number of variants, target any user segment, and control weight distribution.

Each test isolates real revenue impact, so you know exactly what works.

Book a demo

A/B tests · Read the docs

Search test...

All audiences ▾   All placements ▾

Create A/B test

Regular A/B tests | Onboardings A/B tests | Crossplacement A/B tests

● Live (2)   Completed (1)   Drafts   Archive

converted / Onboarding price test / All Users   A/B TEST

👥 All Users #3 📍 Onboarding Paywalls ⏱ Started 11 May 2024 (416 days)

View metrics | ⊙ Stop A/B test

Variant/Paywall/Product		Revenue	P2BB	✦ Predicted P2BB	Proceeds	Net proceeds	CR purchases
› A	US + UK (Drink Picture) WEIGHT: 50%	$27,739	0.00%	0.05%	$20,886	$19,065	1.70%
› B	US + UK (2 Persons Picture) WEIGHT: 50%	$85,629	100.00%	99.95%	$63,668	$61,600	4.69%
Total		$113,368	–	–	$84,553	$80,664	3.19%

converted / Onboarding price test / US + UK users   A/B TEST

👥 US + UK users #2 📍 Onboarding Paywalls ⏱ Started 11 May 2024 (416 days)

View metrics | ⊙ Stop A/B test

Variant/Paywall/Product		Revenue	P2BB	✦ Predicted P2BB	Proceeds	Net proceeds	CR purchases
› A	US + UK (2 Persons Picture) WEIGHT: 80%	$197,391	99.93%	1.37%	$147,634	$143,052	2.92%
› B	US + UK (Drink Picture) WEIGHT: 20%	$40,013	0.07%	98.63%	$29,606	$26,775	3.13%
Total		$237,404	–	–	$177,240	$169,827	2.96%

1-2 of 2   ‹ **1** ›

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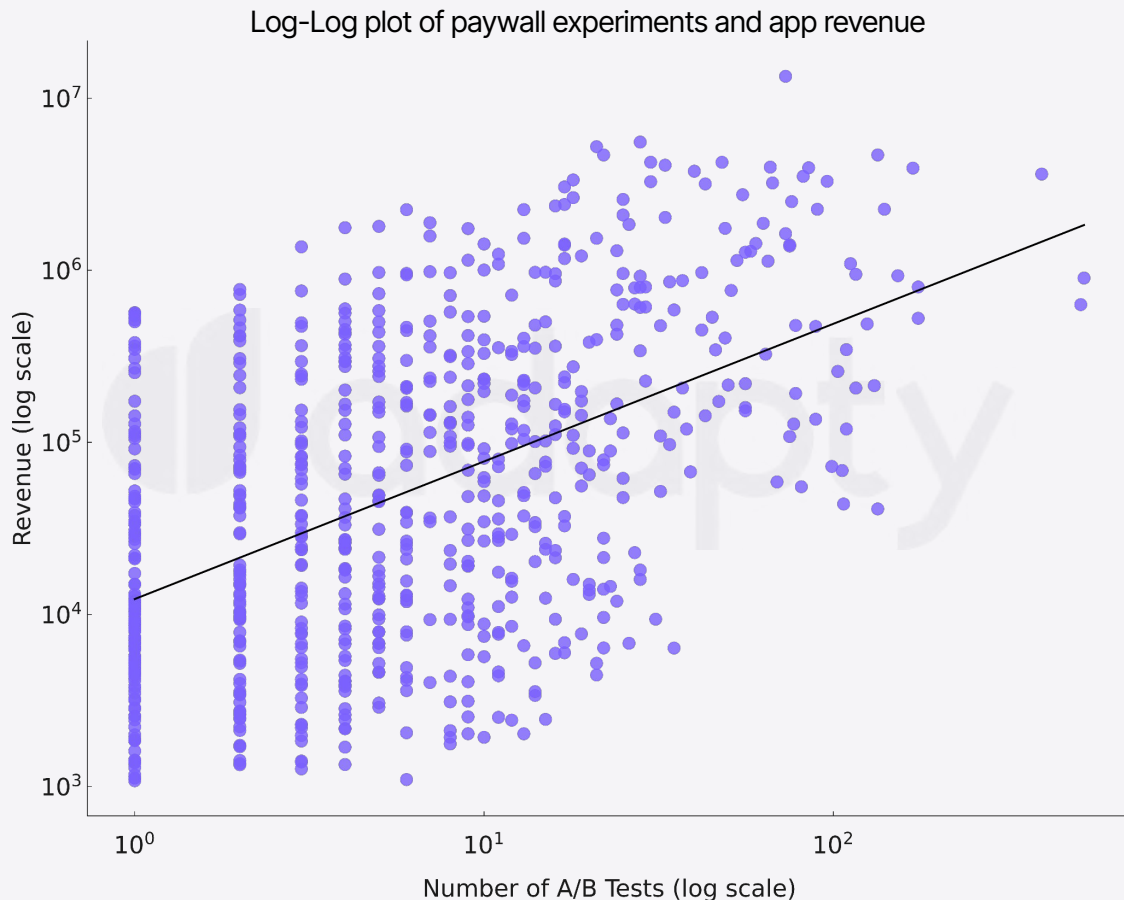
Teams that experiment can make up to **100x more revenue**

Our data shows a clear trend: apps that run more paywall experiments consistently drive higher revenue.
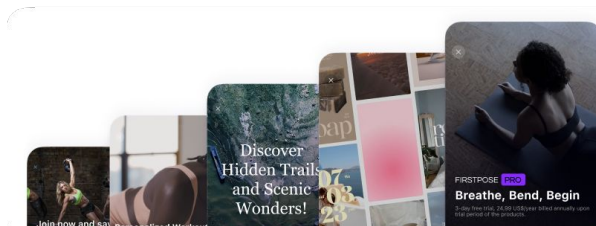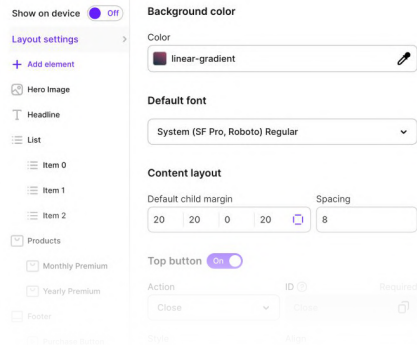
Apps with 50+ experiments often see 10-100× revenue growth.

Log-Log plot of paywall experiments and app revenue

Build and customize paywalls without writing a line of code

Book a demo

Paywall templates

AI paywall generator

No-code native paywall builder

Show on device Off

Layout settings

Add element

Hero Image

Headline

List

Item 0

Item 1

Item 2

Products

Monthly Premium

Yearly Premium

Footer

Background color

Color

linear-gradient

Default font

System (SF Pro, Roboto) Regular

Content layout

Default child margin

20 20 0 20

Spacing

8

Top button On

Action

Close

ID

Close

Required

Trusted by millions

User-friendly interface and robust features. Upgrading to Pro was worth it for the full range of tools. Highly recommend!

Jay Hawkins

Yearly plan
paid annually
$5/month
free 30 days

Monthly plan
paid monthly
$6.99/month

Amazing app!

7-day free trial

Monthly

Let AI build your next paywall

No code. No designer needed. Fully native paywalls. In seconds.

Best app for image generation

Absolutely mind-blowing! Created professional-looking visuals in no time

50% OFF

OFFER ENDS IN:
00:09:59

Remote config, localization, targeting

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The 5 trends driving revenue in 2025

#1 Offer flexibility

Weekly subscriptions jumped 10% and dominate the market. Users increasingly prefer shorter commitments over longer-term plans.

#2 Expand globally with care

The US brings in nearly half of all subscription revenue. But **smaller markets deliver comparable or higher per-user value**. Tailor your offerings and messaging to effectively engage users in each target location.

#3 Offer smart free trials

Trials boost customer lifetime value by up to 64%. They're especially effective for weekly plans, though the ideal length depends on your specific context.

#4 Never stop experimenting

Apps that test more make more money. Focus on trying different trial lengths and subscription durations for the biggest impact.

#5 Test higher price points

Data shows **higher prices don't hurt conversion**. Plans in the upper pricing tiers consistently deliver better lifetime value across all regions.

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Grow your revenue faster with Adapty

Book a demo

Start for free

Enjoyed the report?

Help us create more – please share it!