

State of AI Apps 2026: APAC Edition

Global Trends & Insights



Sensor Tower

Overview

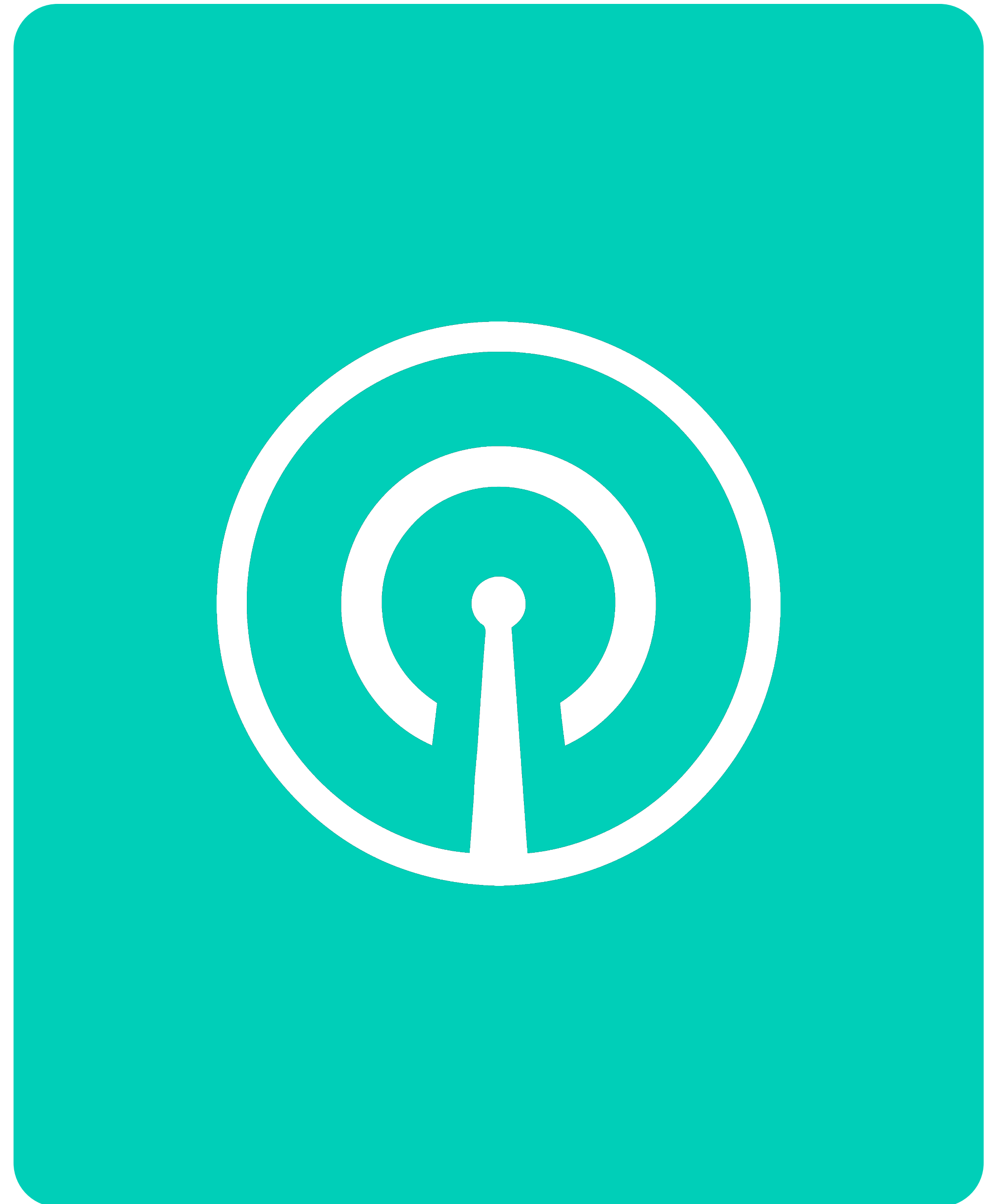
Sensor Tower is the leading source of mobile app, digital advertising, retail media, and audience insights for the largest brands and app publishers across the globe.

With a mission to measure the world's digital economy, Sensor Tower's award-winning platform delivers unmatched visibility into the mobile app and digital ecosystem, empowering organisations to stay ahead of changing market dynamics and make informed, strategic decisions.

Founded in 2013, Sensor Tower's mobile app insights have helped marketers, app, and game developers demystify the mobile app landscape with visibility into usage, engagement, and paid acquisition strategies. Today, Sensor Tower's digital market insights platform has expanded to include Audience, Retail Media, and Pathmatics Digital Advertising Insights, helping brands and advertisers understand their competitor's advertising strategies and audiences across web, social, and mobile.

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Business Inquiries: sales@sensortower.com



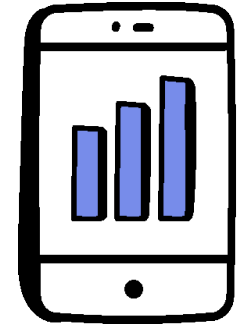
Sensor Tower | Our Customers

Top publishers trust Sensor Tower insights to grow their business.

L'ORÉAL		Google			Disney
petco	HERSHEY	amazon	ROVIO	DOORDASH	depop
Walmart		Microsoft	SEGA	dyson	SONY
		Meta	OUTFIT7	Gett.	ByteDance
Alibaba	POPeYeS	Tencent 腾讯		P&G	NBA
		Johnson & Johnson		Welch's	Revolut

Note: Top publishers by app store revenue | Source: Sensor Tower

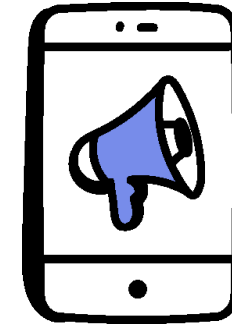
Sensor Tower Solutions



Sensor Tower **App Performance Insights**

**For those who need visibility
into the mobile app ecosystem.**

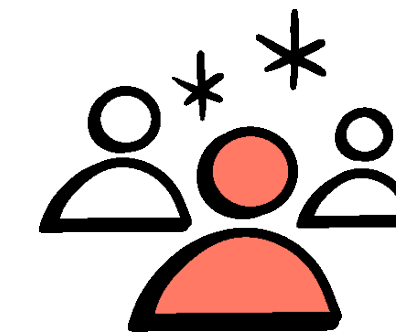
Enjoy insight into: app rankings, downloads, and revenue; active users, demographics, retention, sessions, and time spent; app ratings and reviews, keywords, search ads, and more.



Sensor Tower **App Advertising Insights**

**For those who need visibility
into paid user acquisition
strategies.**

Enjoy insight into: global and regional share of voice (SOV) across apps and the biggest mobile app ad networks, top advertisers, publishers, creatives, and more.



Sensor Tower **Audience Insights**

**For those who need visibility
into your existing, competitor,
and potential new audiences.**

Enjoy insight into: which apps consumers are actually interacting with (app engagement) AND which ads they're seeing (ad exposure).

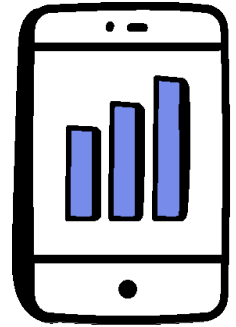


Sensor Tower **Pathmatics Digital Advertising Insights**

**For those who need visibility
into the digital ad ecosystem.**

Gain insight into: ads served, spend and impression estimates, SOV, and more across key channels, like: Facebook, Instagram, X (formerly Twitter), OTT, YouTube, display, video, and others.

Sensor Tower Solutions

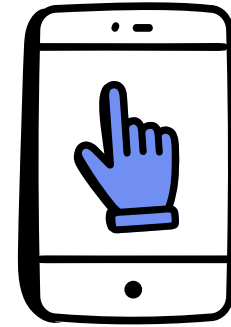


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Gaming Insights

For those who need the deepest look into the mobile gaming ecosystem.

Enjoy insight into: downloads, revenue, RPD, and ARPDAU beyond the top-level category (Lifestyle & Puzzle) and can drill deeper into genres (Puzzle, Arcade, etc.) and sub-genres (Swap, Word, etc.).

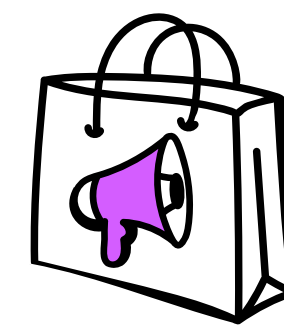


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Advanced Usage Insights

For those who need the deepest look into app user engagement.

Enjoy insight into: sessions per user; time spent; time of day; days used per time period; new, retained, resurrected, and churned user trends; and cohort usage overlap.



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Pathmatics Retail Media Insights

For those who need industry-first insight into on- and off-site retail media network investments.

Enjoy insight into: ad spend, media mix, share of wallet, impressions, and SOV for brands and products across retailers – gaining a coveted view into the co-branded digital ad ecosystem and retail media networks.



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Video Game Insights

Discover top game trends on PC and Console platforms.

Get deep insights into key metrics like sales, revenue, DAU, and MAU for over 140,000 PC and Console games across 100+ global markets. Analyze shifts in player behavior to uncover critical intelligence on player acquisition and retention.

Sensor Tower

Data & Methodology

Sensor Tower’s **Pathmatics** empowers you to uncover insights into the digital advertising ecosystem, minimise ineffective ad spend, and enhance the precision of your advertising campaigns. With Pathmatics, you gain visibility into the digital advertising landscapes across markets including the United States, Australia, Brazil, Canada, France, Germany, Italy, Indonesia, India, Japan, Malaysia, Mexico, New Zealand, Philippines, Singapore, Spain, South Korea, Thailand, the United Kingdom and Vietnam. Pathmatics provides comprehensive estimates on ad placements, spending, impressions, and share of voice (SOV), as well as in-depth analysis of brands' advertising strategies on platforms like Facebook, Instagram, X (formerly Twitter), YouTube, and TikTok, across formats such as display banners, videos, mobile, and OTT.

Pathmatics collects digital ad samples from the web and utilises statistical sampling methods to estimate the impressions, cost-per-thousand impressions (CPM), and expenditure associated with each creative.

Digital Advertising Channels Supported by Pathmatics Across Markets

	Desktop Display and Video	Facebook Instagram	LINE	Linkedin	Mobile App Ad Networks	Mobile Display and Video	OTT	Pinterest	Reddit	Snapchat	TikTok	X	YouTube
United States	•	•		•	•	•	•	•	•	•	•	•	•
Australia	•	•				•		•	•	•	•		•
Brazil		•		•				•	•		•	•	
Canada	•	•		•	•	•		•	•	•	•		•
France		•		•				•	•	•	•		•
Germany	•	•		•	•	•		•	•	•	•		•
India		•						•	•	•		•	
Indonesia		•		•				•	•		•	•	•
Italy		•						•	•	•	•		•
Japan		•	•		•						•	•	•
Malaysia		•						•	•		•	•	•
Mexico		•									•		•
New Zealand	•	•				•							•
Philippines		•			•			•	•		•	•	
Singapore		•							•		•		•
South Korea		•			•						•		•
Spain		•						•	•	•	•	•	•
Thailand		•	•								•		•
United Kingdom	•	•		•	•	•		•	•	•	•	•	•
Vietnam		•						•			•	•	•

Sensor Tower

Executive Summary

This report provides an in-depth analysis of global trends in Gen AI apps across both mobile and web platforms in 2026. It covers the overall market landscape, regional revenue growth dynamics and the performance of key segments including AI Assistants, AI Agent Productivity Apps, AI Companion Apps, and AI Image & Video Generation Apps.

The report also features benchmark case studies, breaking down the revenue scale and advertising strategies of leading AI apps such as *Plaud*, *Zeta*, and *PixAI* – helping publishers identify high-value growth opportunities and capitalise on emerging monetisation trends.

Notes on Revenue and Download Estimates

Sensor Tower's revenue data is based on in-app purchase (IAP) estimates from App Store and Google Play, excluding ad monetisation, revenue from third-party Android stores or direct payments made via official brand websites or other alternative payment channels. Unless otherwise specified as net revenue, all revenue figures refer to gross revenue (i.e. before platform fees are deducted).

Sensor Tower's download data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and downloads from third-party Android stores. Google Play is not available in Mainland China.

Definition of AI Apps

The AI apps discussed in this report refer specifically to AI-native generative AI apps – apps fundamentally built around generative AI models from inception, rather than traditional software augmented with AI features. Their core workflows, interactions and value creation are AI-driven, and the apps would not function without AI.



Agenda

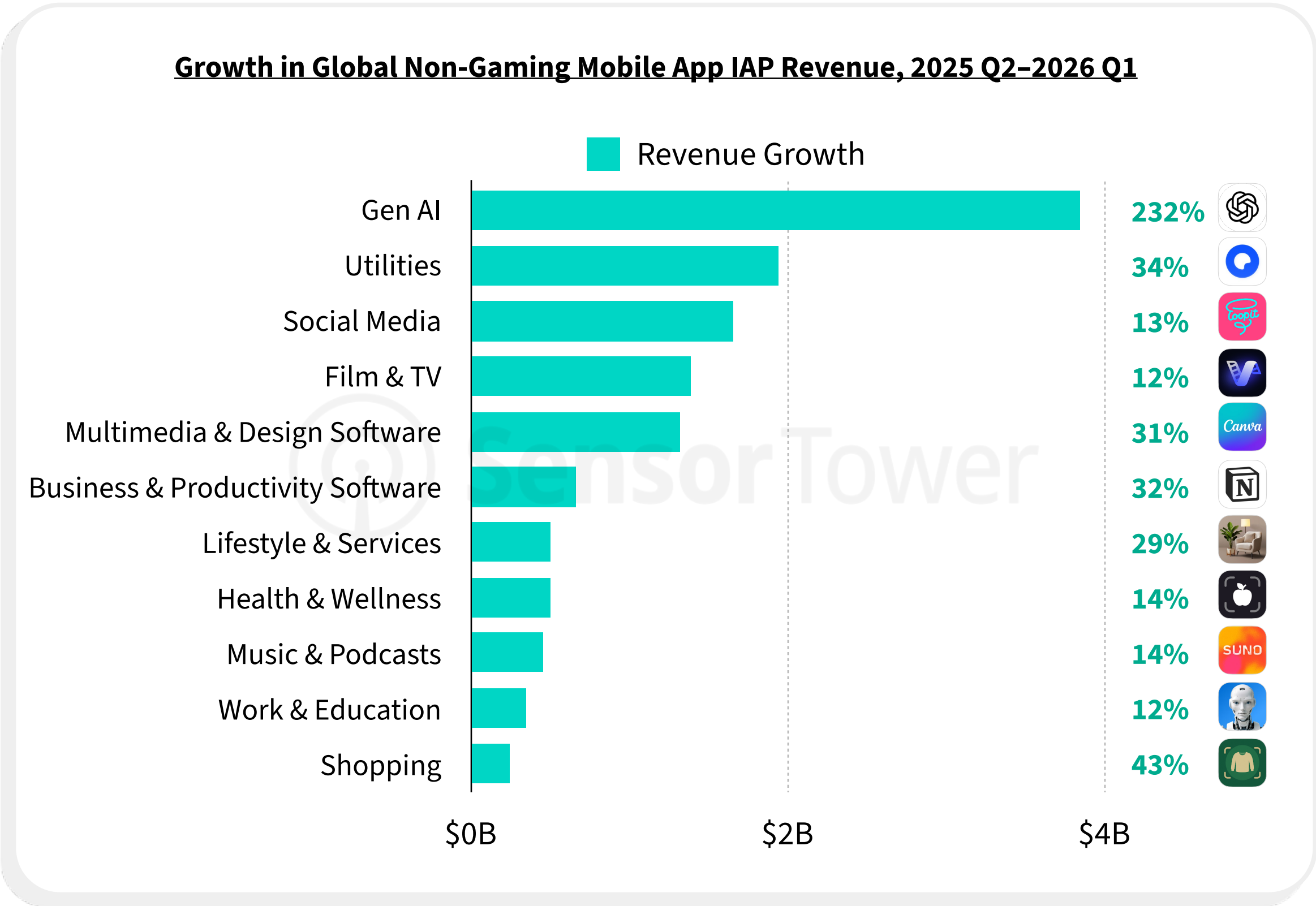
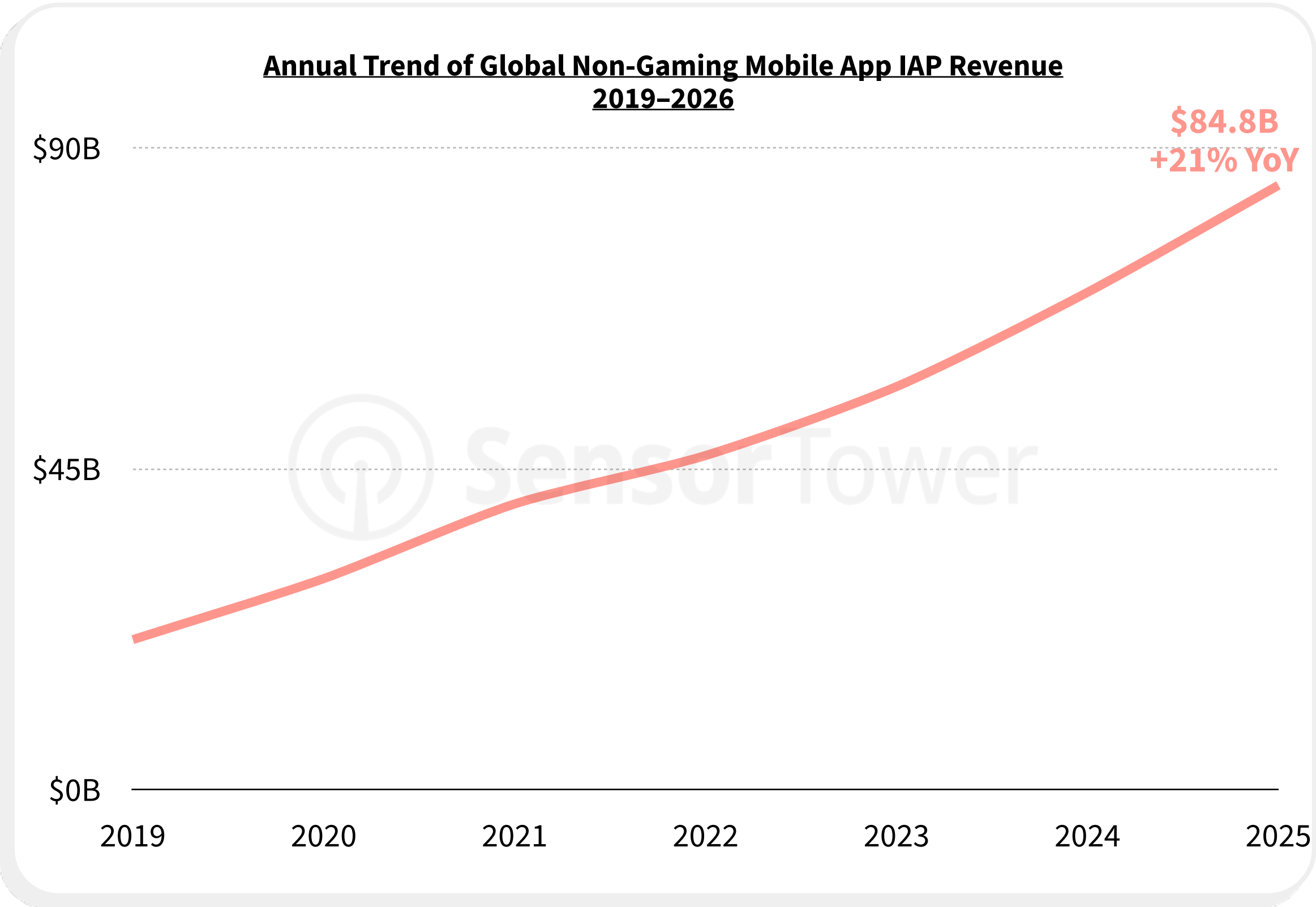
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Global AI App Market Overview

Gen AI Fuels Rapid Growth in Non-Gaming App Revenue, While Accelerating Growth Across Adjacent Categories

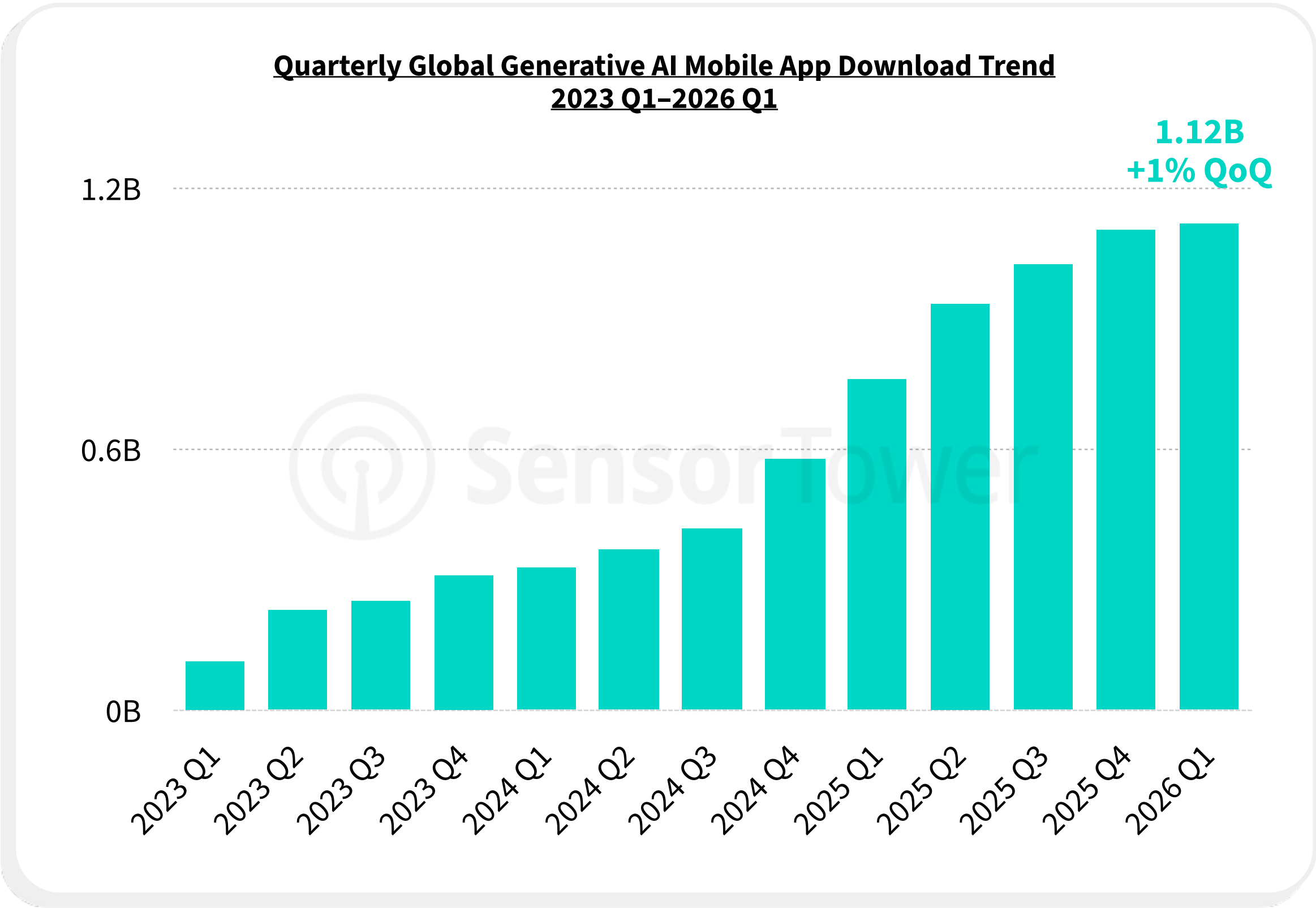
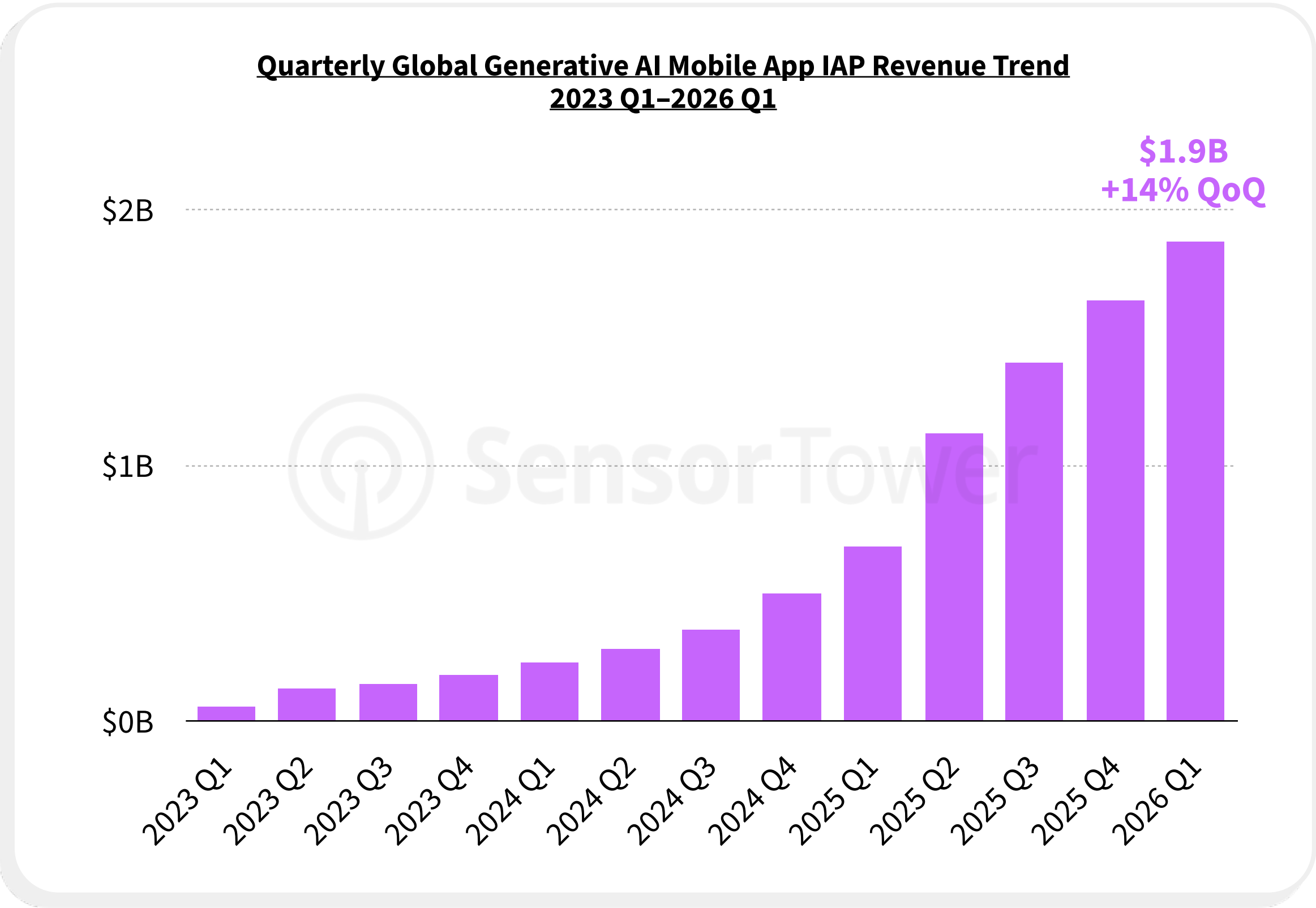
Source: Sensor Tower App Performance Insights & App IQ Classification



From 2019 to 2025, global non-gaming mobile app IAP revenue continued to grow rapidly, reaching \$84.8B in 2025 (+21% YoY). Between 2025 Q2 and 2026 Q1, Gen AI emerged as the category’s primary growth engine, with revenue surging 232% YoY and contributing more than \$4.4B in incremental revenue – far outperforming all other categories in both growth rate and scale. As Generative AI expands across adjacent verticals, categories such as Utilities, Multimedia & Design and Business & Productivity apps are also seeing strong revenue acceleration.

Gen AI Mobile App Revenue Surges 32x in 3 Years, Up 232% YoY to \$6.1B Over the Past Year

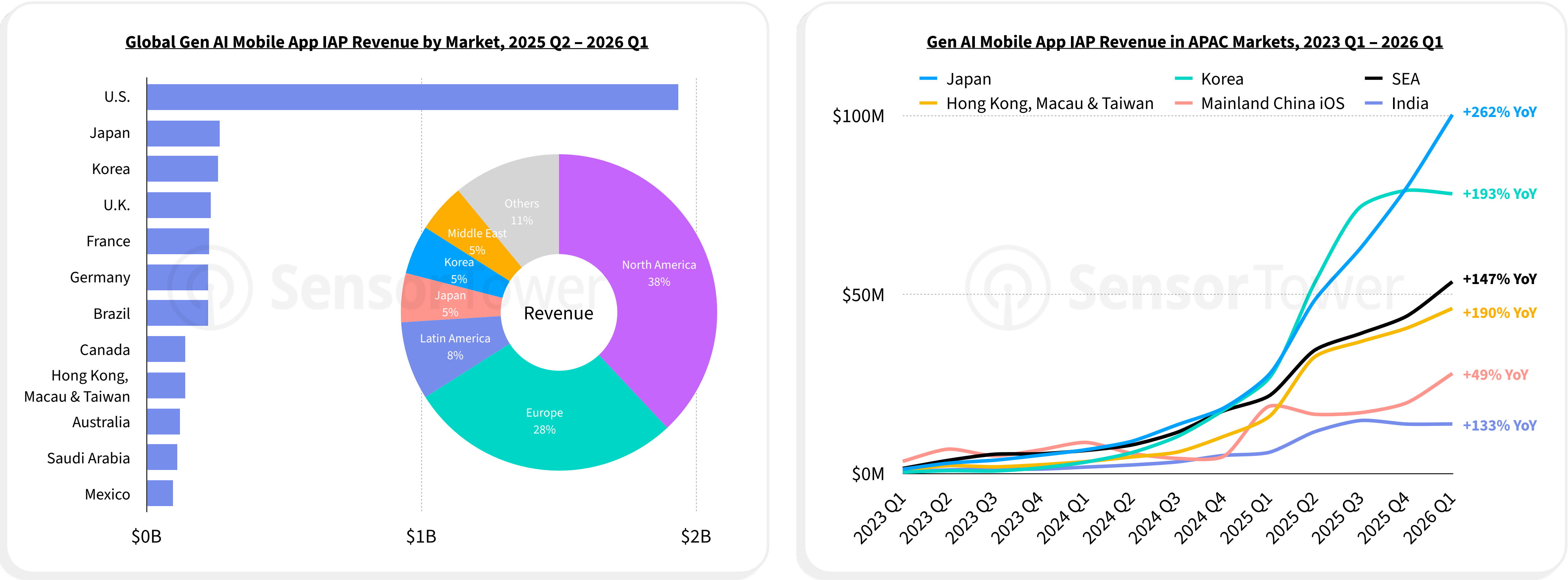
Source: Sensor Tower App Performance Insights



Generative AI mobile app revenue has entered an exponential growth phase, rising from less than \$60M in 2023 Q1 to \$1.9B in 2026 Q1 – a more than 32x increase in just 3 years. Between 2025 Q2 and 2026 Q1, annual IAP revenue surged 232% YoY to \$6.1B, with annualised growth exceeding 200%. At the same time, download growth has started to moderate. Gen AI app downloads reached 1.12B in 2026 Q1, growing just 1% QoQ – suggesting the market is entering a temporary plateau in new user acquisition, while overall penetration remains in its early stages.

Gen AI Revenue Landscape: U.S. Dominates While APAC Markets Rapidly Scale

Source: Sensor Tower App Performance Insights

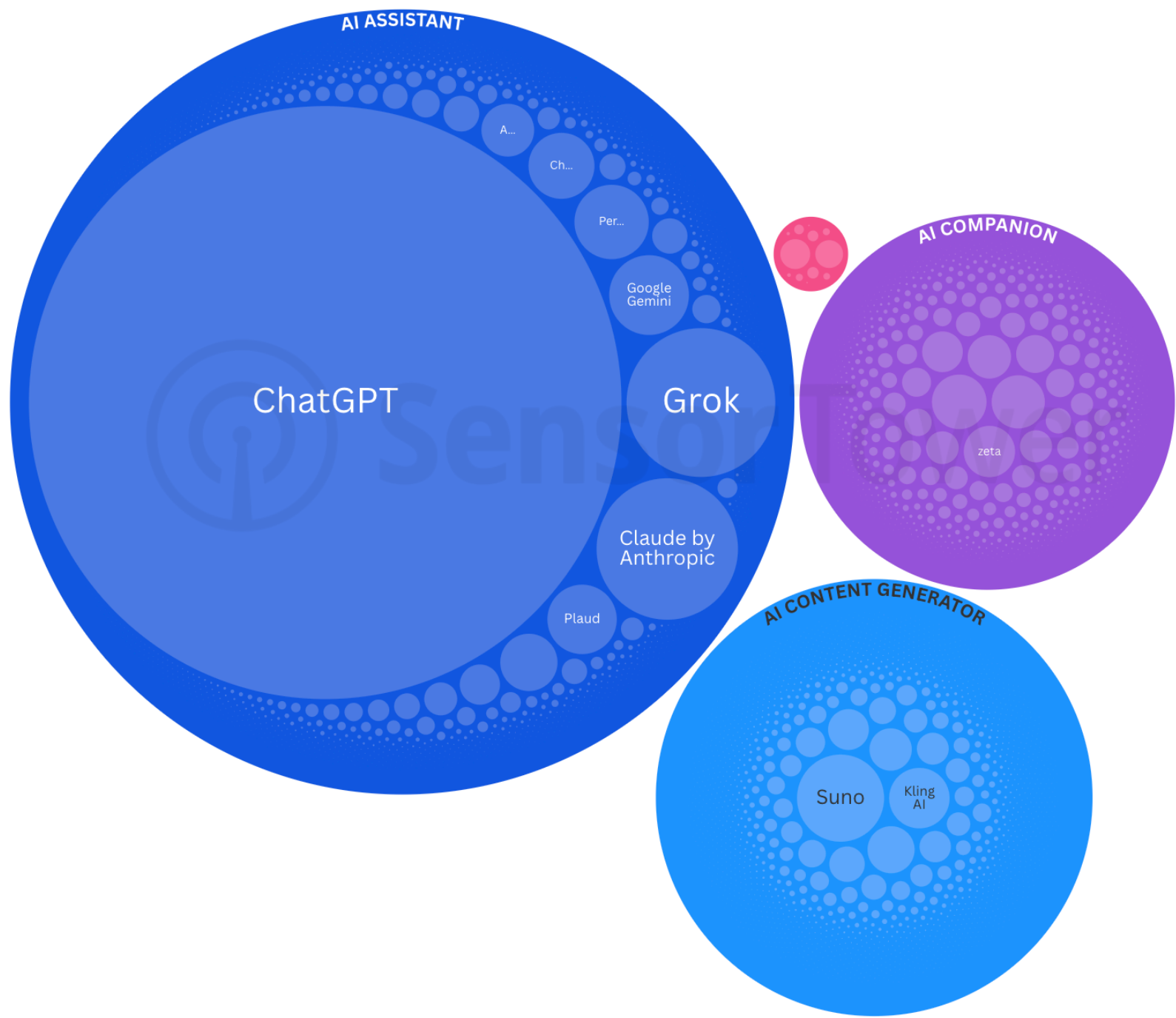


Between 2025 Q2 and 2026 Q1, the U.S. remained the world’s largest Gen AI app market, generating nearly \$2.2B in IAP revenue and contributing close to 38% of global revenue – far ahead of all other markets. Japan, South Korea, the U.K., France, Germany and Brazil formed the second tier of markets, each generating between \$200M and \$300M in revenue. Within APAC, Japan and South Korea stood out as key growth engines for global AI apps, with Japan’s revenue surging 262% YoY in 2026 Q1 and quarterly revenue surpassing \$100M for the first time.

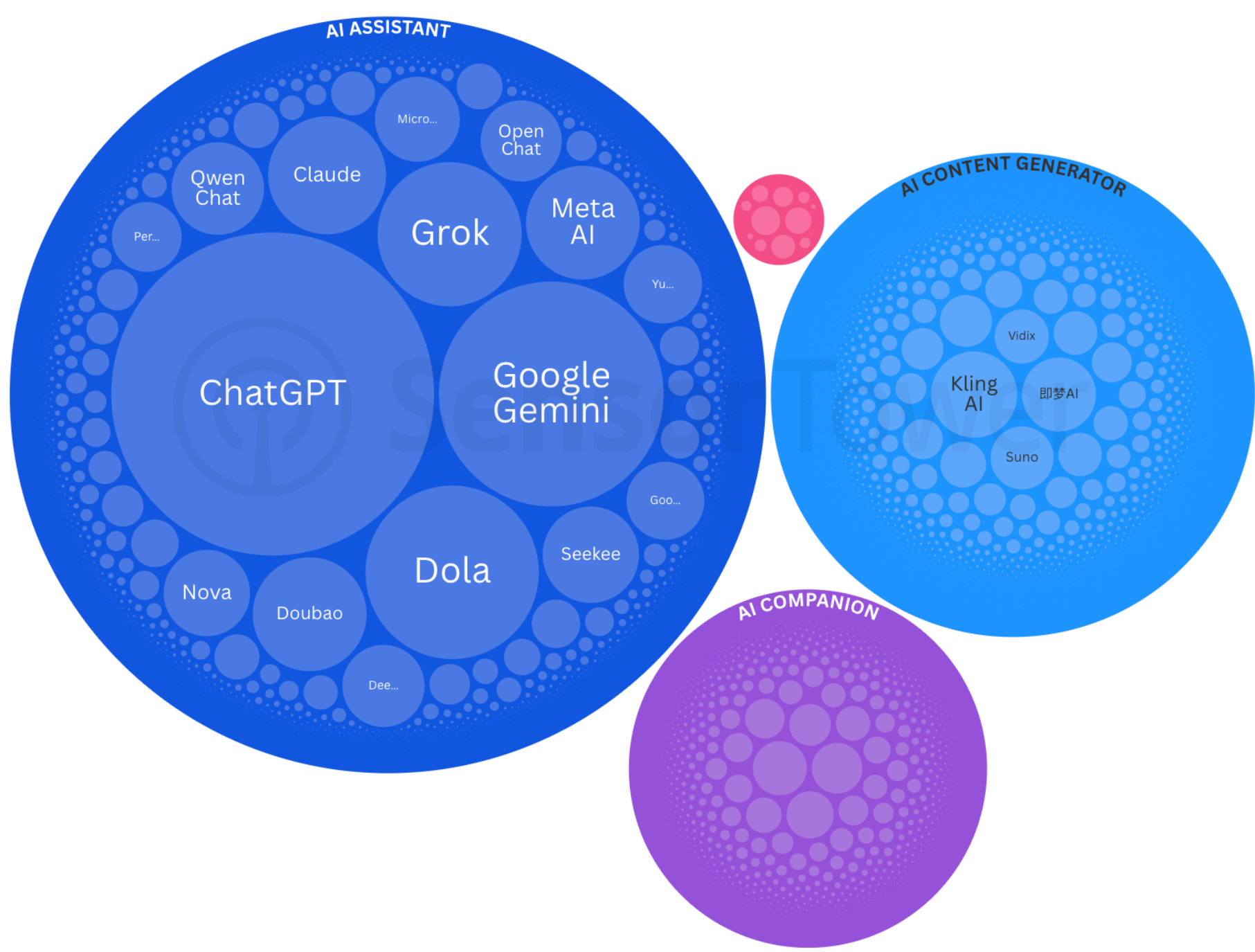
Global Gen AI Revenue Landscape: AI Assistants Dominate While AI Companion Apps Remain Fragmented

Source: Sensor Tower App Performance Insights

2026 Q1 Global Gen AI Mobile App IAP Revenue Share by Category



2026 Q1 Global Gen AI Mobile App Download Share by Category



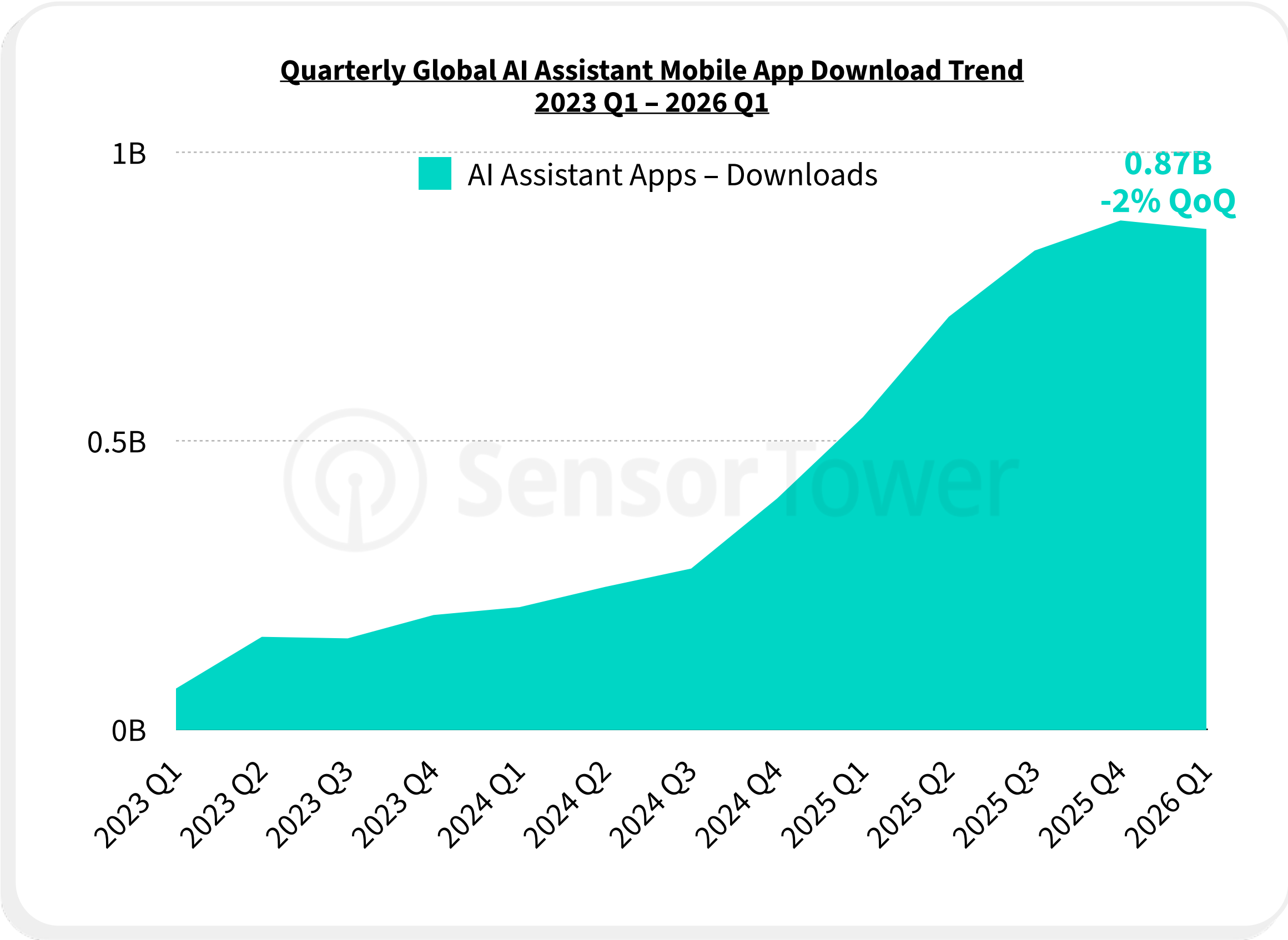
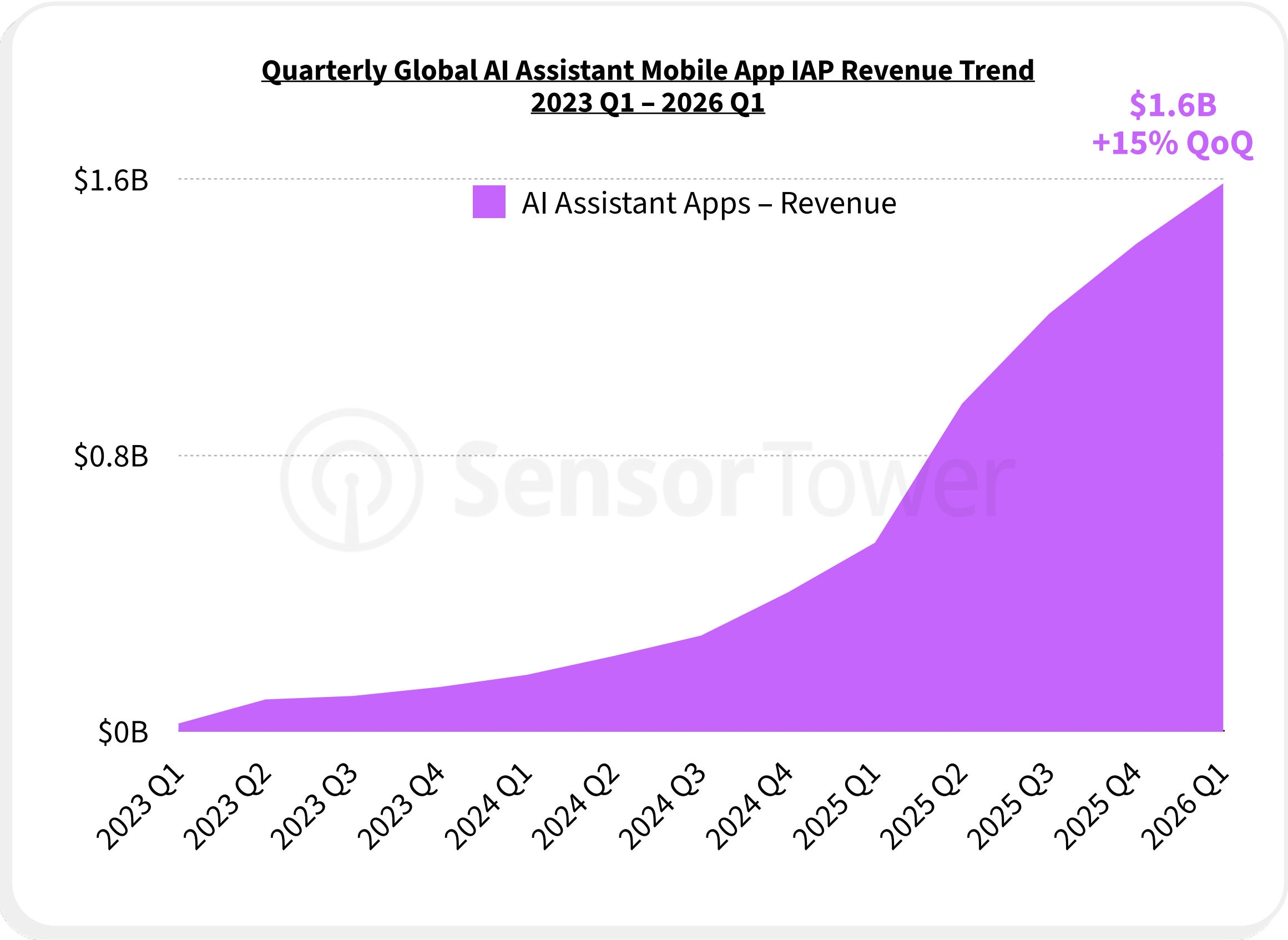
The AI Assistant category remains highly concentrated, with ChatGPT continuing to dominate the category through scale, brand strength and ecosystem advantages. In contrast, AI Companion and AI Content Generator apps remain in a rapid growth phase, with revenue and downloads spread across a large number of emerging players. As competition in these categories is still evolving, new entrants continue to have opportunities to break out.



AI Assistant Apps

AI Assistant Apps: Quarterly Mobile IAP Revenue Surpasses \$1.6B, Up 15% QoQ

Source: Sensor Tower App Performance Insights



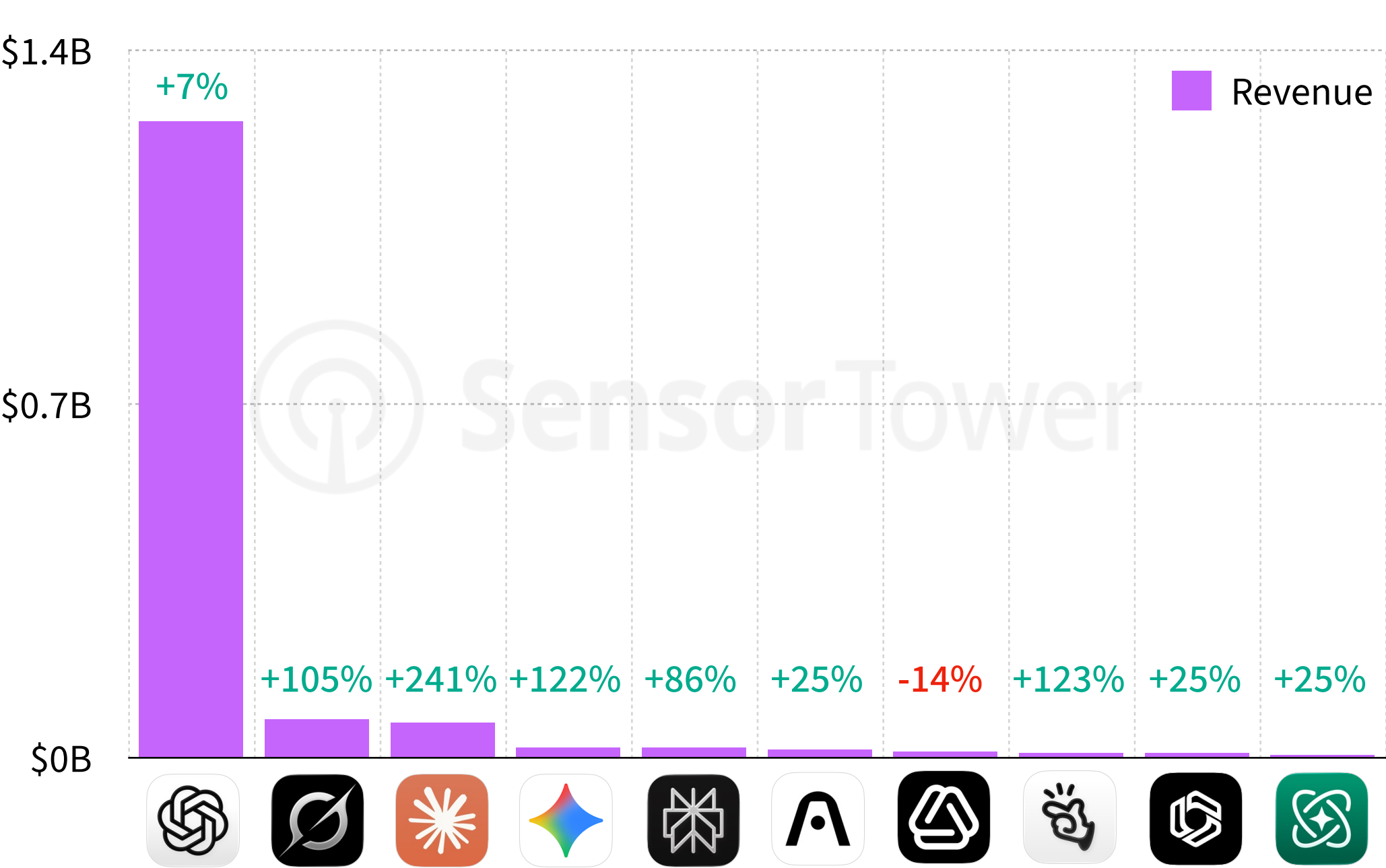
In 2026 Q1, AI Assistant apps surpassed \$1.6B in quarterly IAP revenue, up 15% QoQ, making it one of the largest and most mature categories within Gen AI.

At the same time, download growth has started to slow, with downloads declining QoQ for the first time in 2026 Q1 – signalling rising user acquisition challenges as mainstream adoption approaches saturation.

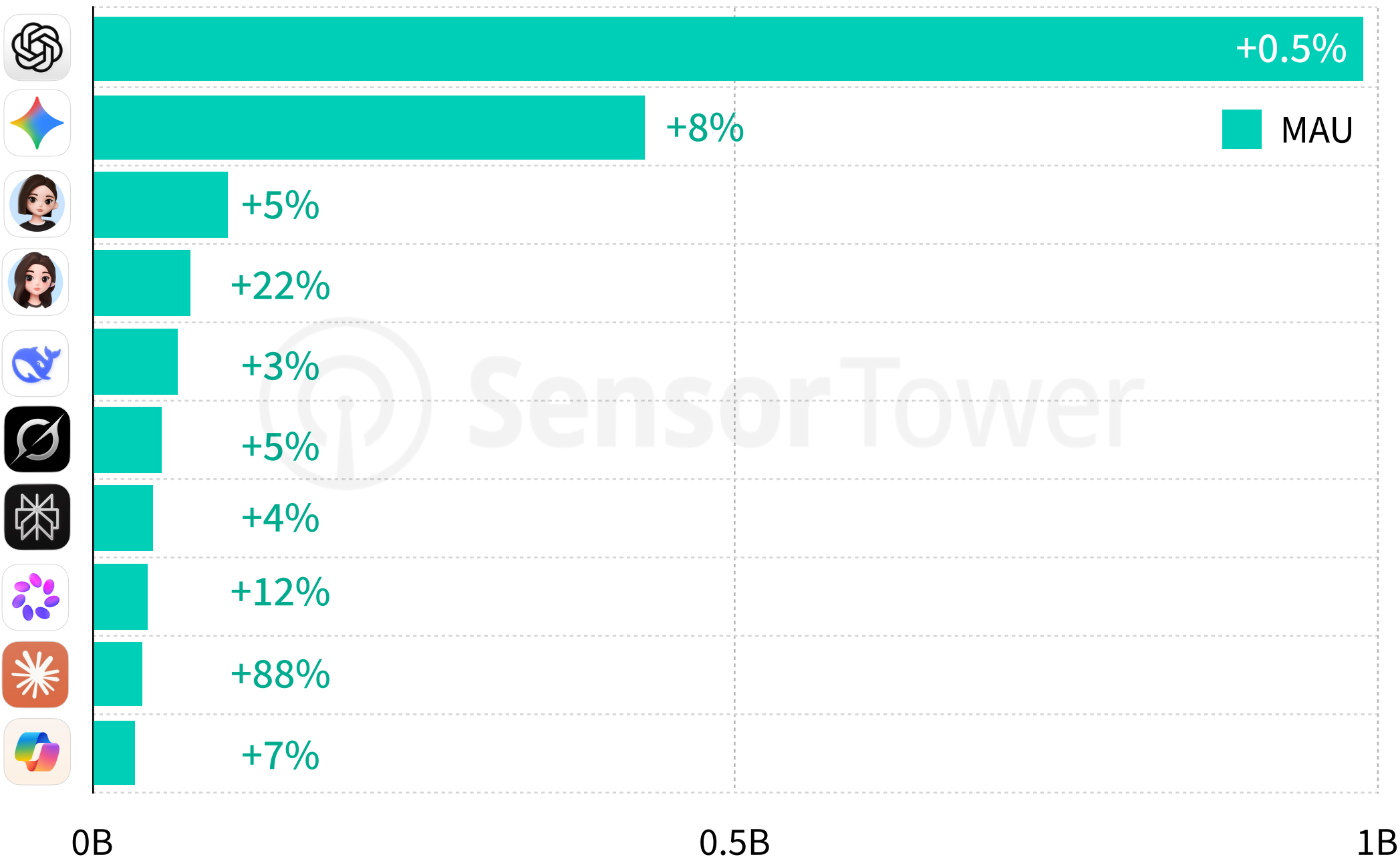
ChatGPT Dominates Mobile Revenue While MAU Nears 1B; Doubao, Dola and DeepSeek Continue to Scale

Source: Sensor Tower App Performance Insights

Top 10 Global AI Assistant Mobile Apps by IAP Revenue, 2026 Q1



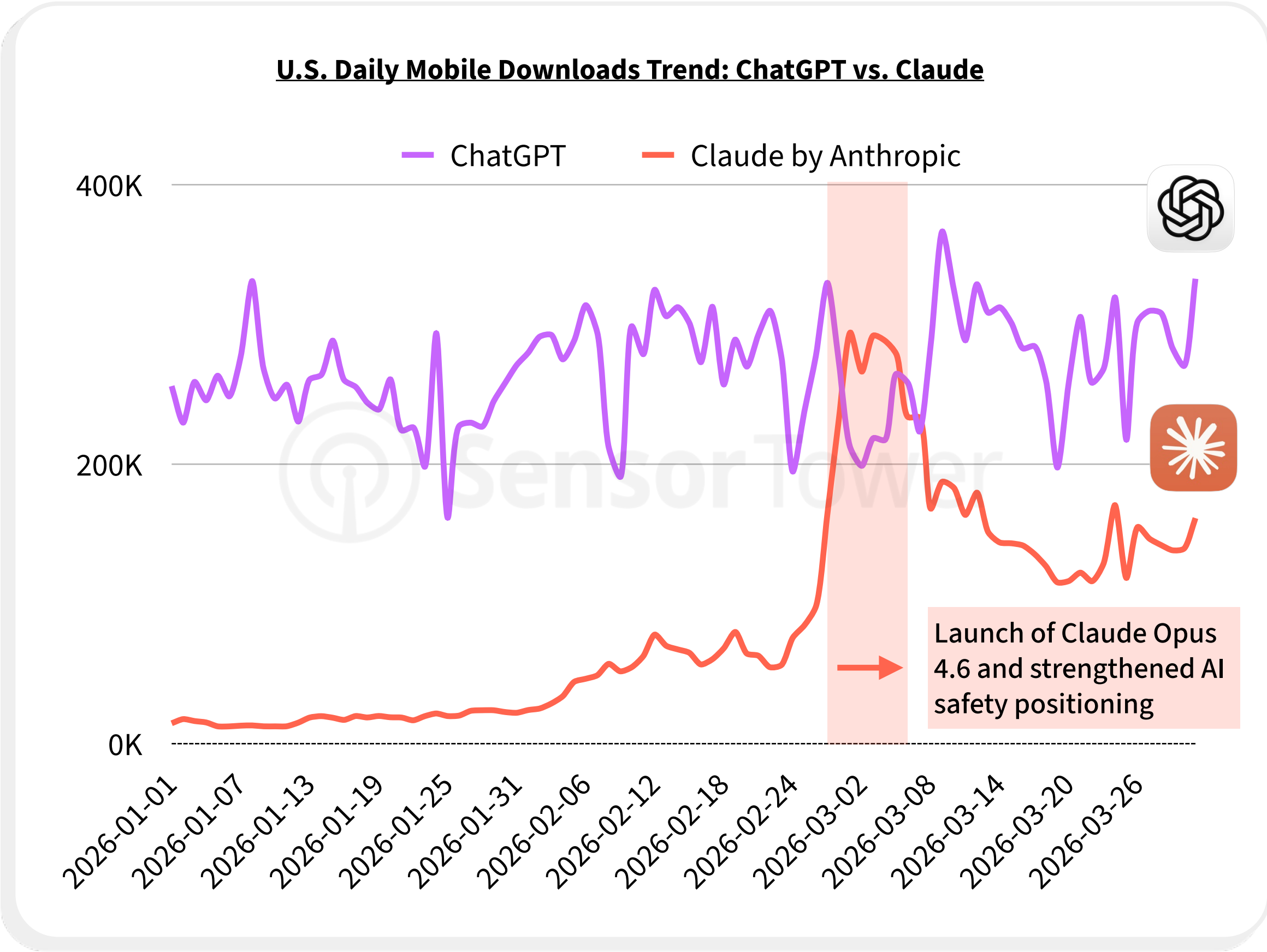
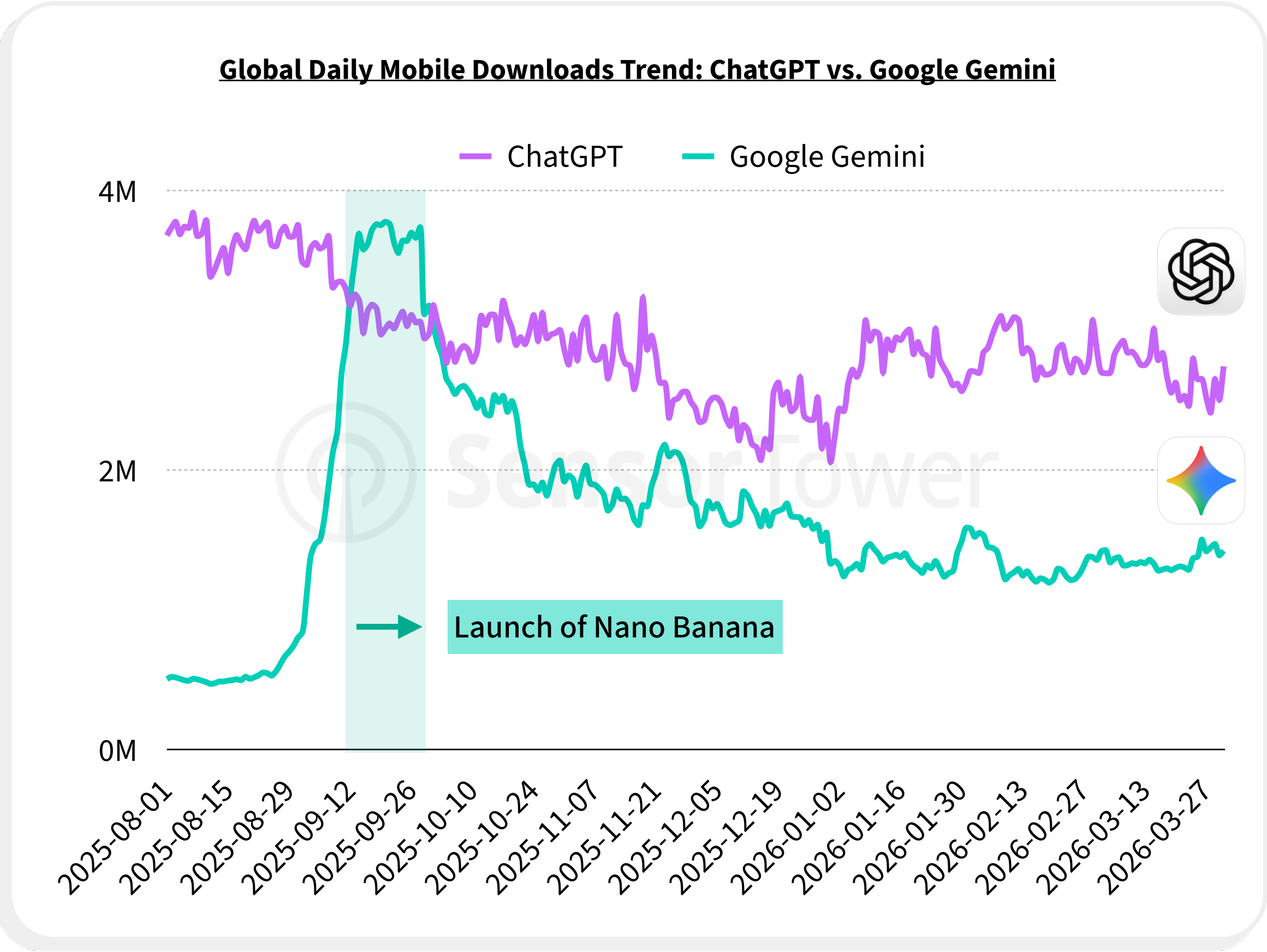
Top 10 Global AI Assistant Mobile Apps by MAU, March 2026



ChatGPT generated nearly \$1.3B in mobile revenue in 2026 Q1 – over 5x the combined revenue of the remaining top 10 apps – reinforcing its dominant market position. In March 2026, ChatGPT mobile MAU approached 1B, although growth slowed to just 0.5% QoQ, signalling the category’s transition toward maturity. At the same time, apps such as Grok, Claude and Google Gemini continued to scale rapidly, intensifying competition across the AI Assistant category. Grok leveraged X’s real-time data ecosystem for differentiation, while Claude expanded through enterprise AI demand and Gemini benefited from Google’s broader platform ecosystem.

ChatGPT Faces Growing Pressure from Gemini and Claude

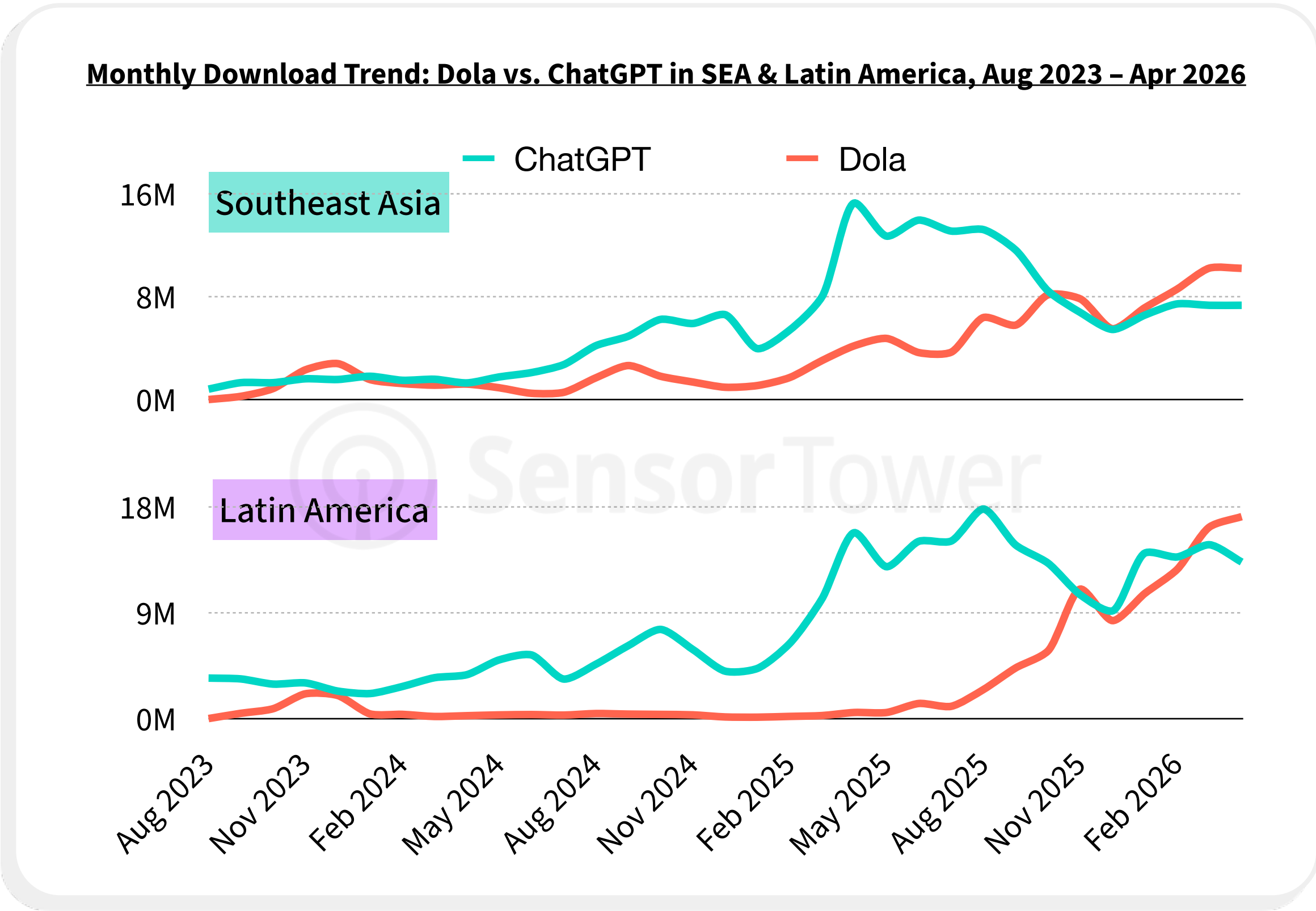
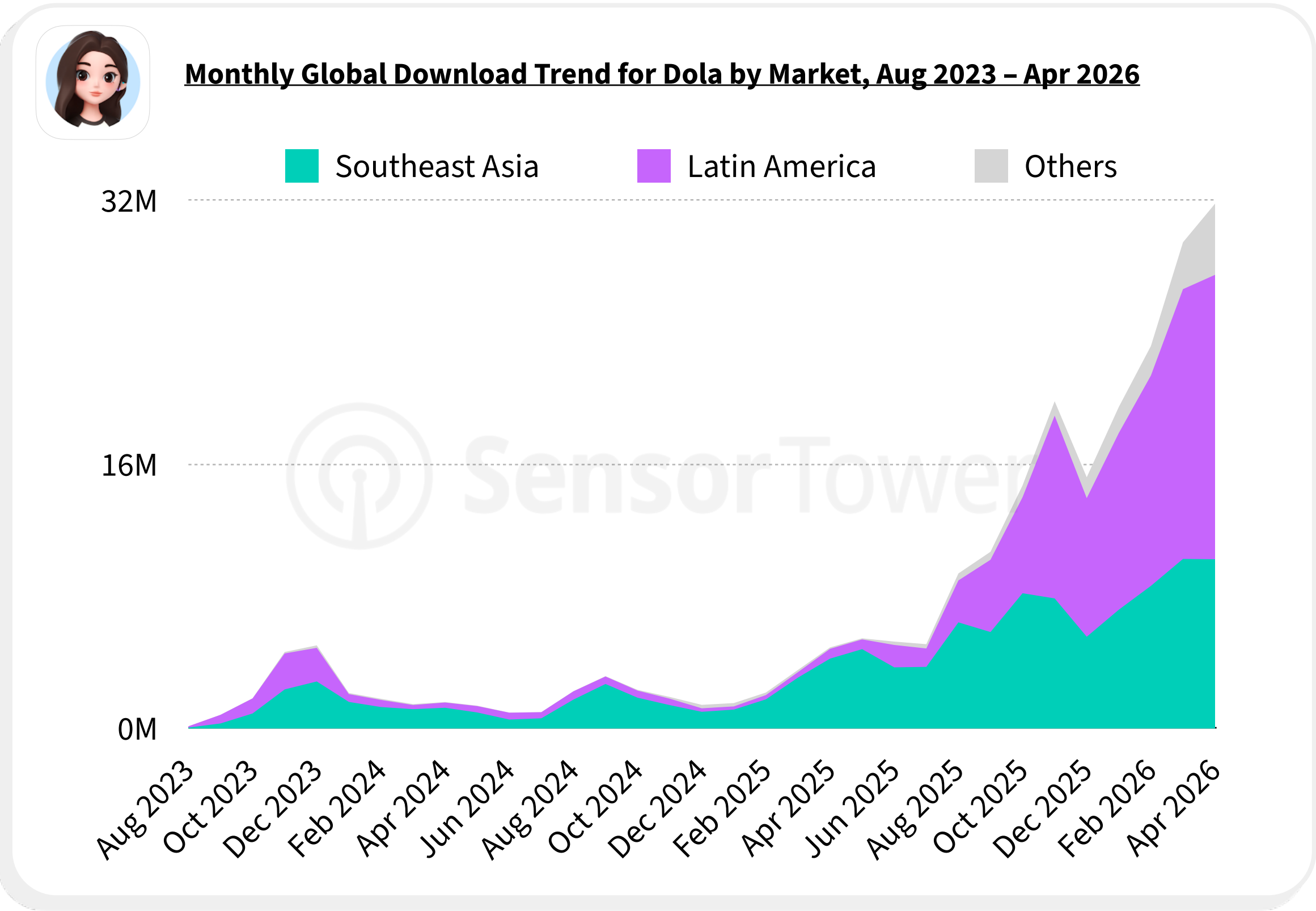
Source: Sensor Tower App Performance Insights



Following the launch of Gemini’s “Nano Banana” model in September 2025, daily mobile downloads briefly surged to nearly 4M globally, temporarily surpassing ChatGPT and driving noticeable share shifts in the category. Meanwhile, after the release of “Claude Opus 4.6” in March 2026, Claude’s U.S. daily mobile downloads climbed from below 100K to nearly 300K, briefly approaching ChatGPT. Its differentiated positioning around AI safety and refusal to work with the Pentagon resonated strongly with segments of the market, accelerating user growth.

Dola Gains Ground Against ChatGPT Through Differentiated Positioning Across Southeast Asia and Latin America

Source: Sensor Tower App Performance Insights



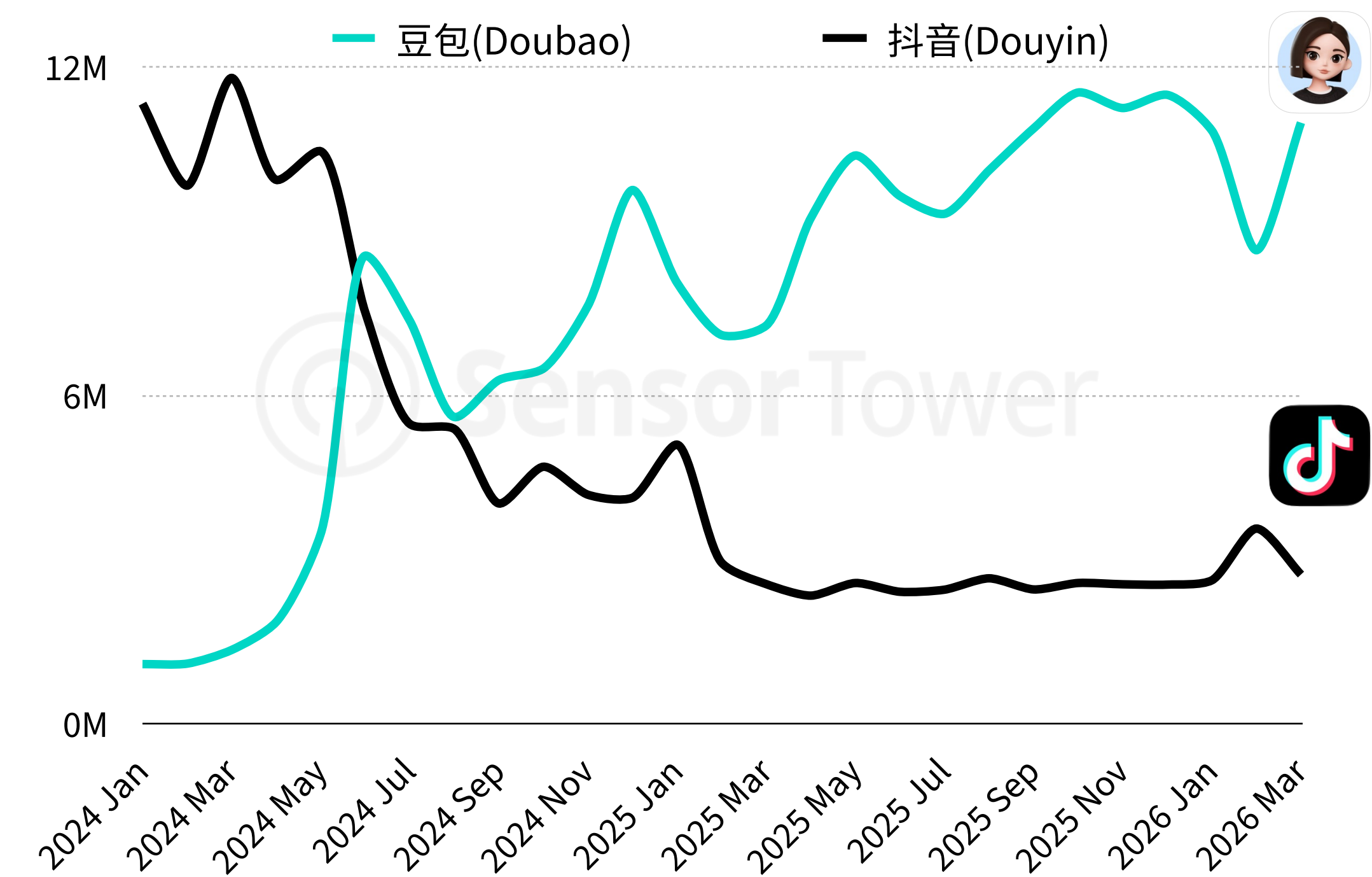
Dola has entered a breakout growth phase, with global monthly downloads approaching 32M in April 2026 and cumulative downloads surpassing 236M. Southeast Asia and Latin America emerged as its core growth markets, contributing 49% and 44% of total downloads respectively.

According to Sensor Tower’s data, Dola has already surpassed ChatGPT in monthly downloads across both Southeast Asia and Latin America, becoming one of the region’s fastest-growing AI apps.

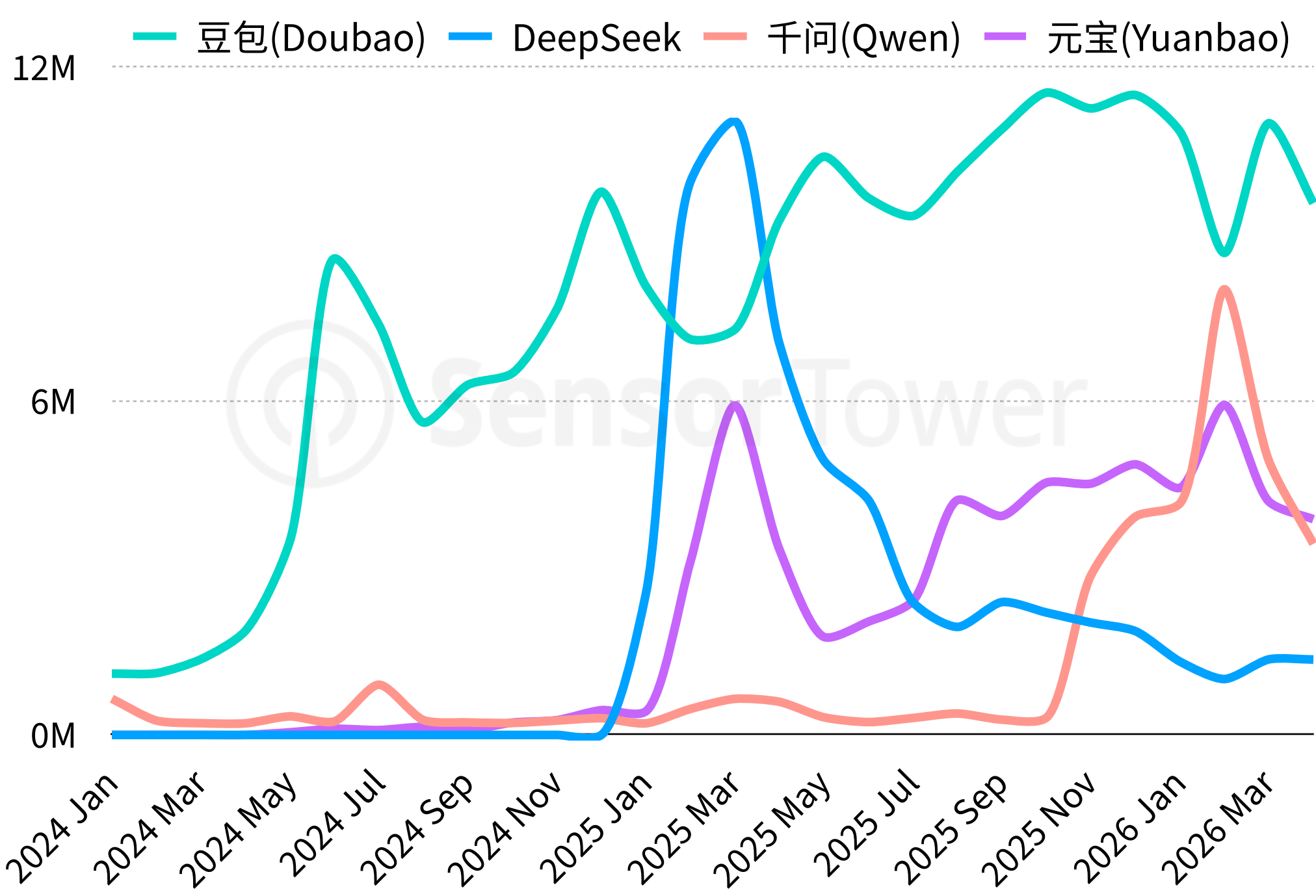
China's iOS AI Assistant Market Remains Highly Localised, with 豆包(Doubao) Topping Mobile App Download Rankings for 12 Consecutive Months

Source: Sensor Tower App Performance Insights

Monthly Download Trend: 豆包(Doubao) vs. 抖音(Douyin) on China iOS, Jan 2024 – Mar 2026



Monthly Download Trend of AI Assistant Apps on China iOS, Jan 2024 – Mar 2026



China's iOS AI Assistant market remains highly localised, with apps such as 豆包(Doubao), DeepSeek, 千问(Qwen) and 元宝(Yuanbao) leading the category. Doubao continues to dominate downloads while maintaining strong growth momentum. Since June 2024, Doubao has surpassed 抖音(Douyin) in downloads, and since April 2025, it has remained the most-downloaded mobile app on China iOS for 12 consecutive months.

AI Agent Apps

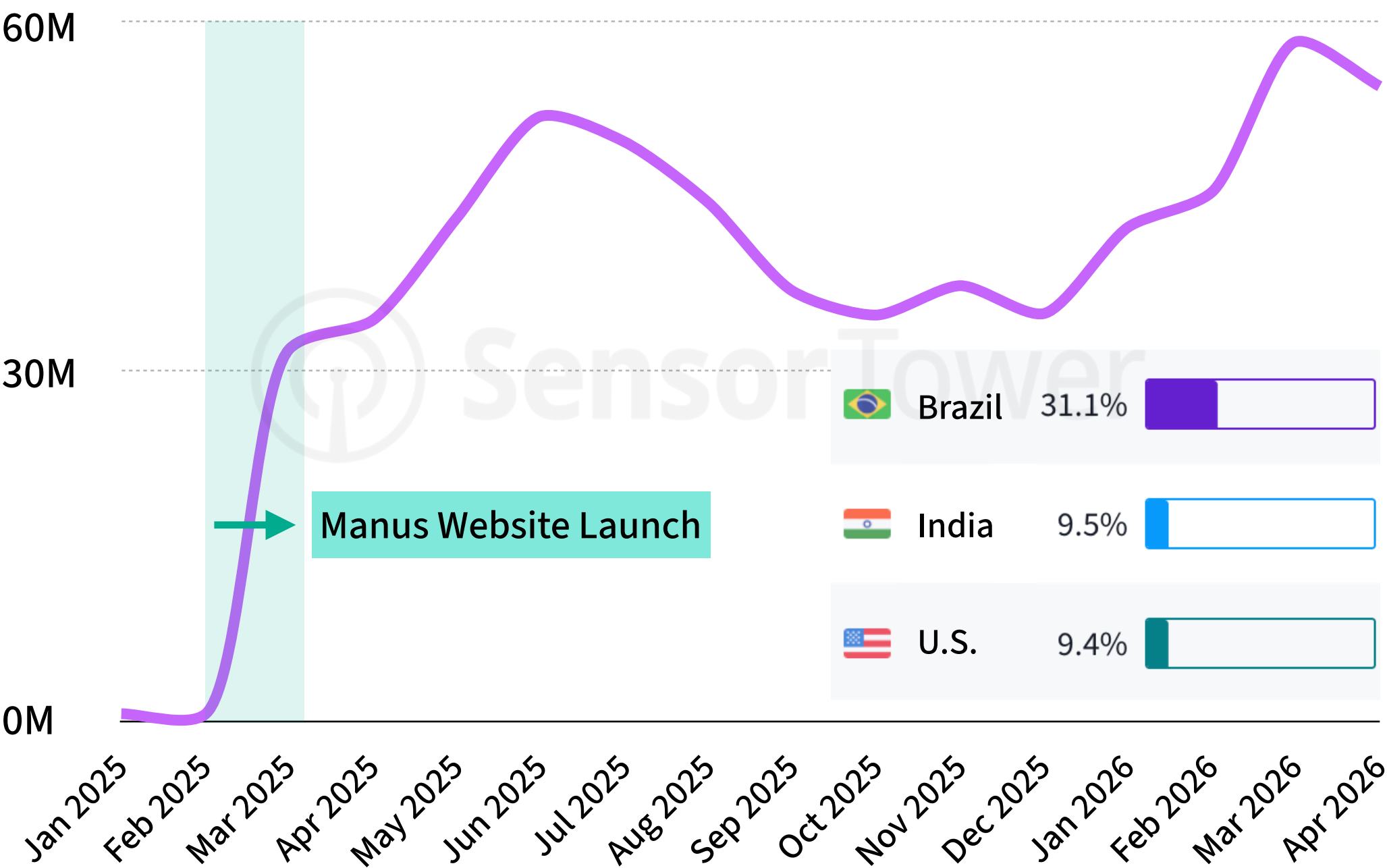


Manus Sparks Immediate Market Adoption, Driving Record Mobile Revenue in 2026 Q1

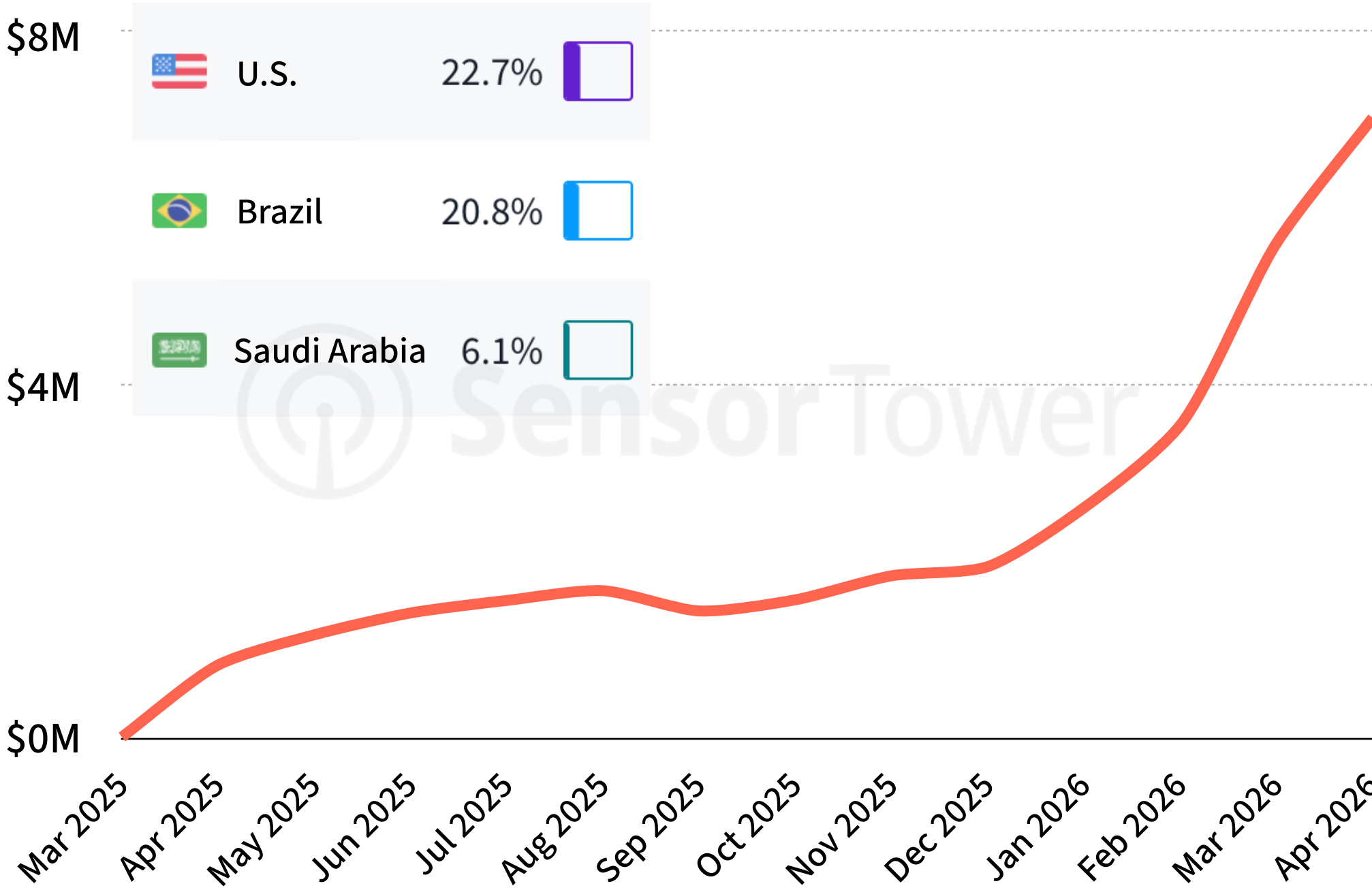
Source: Sensor Tower App Performance Insights & Web Insights

Manus is a general-purpose AI Agent capable of autonomously planning tasks, using tools, and completing complex workflows. Following its launch, the Manus website rapidly gained traction, surpassing 58M global visits in April 2026. On mobile, Manus revenue grew 124% QoQ in 2026 Q1, placing it among the Top 10 AI apps globally by revenue. As of April 2026, cumulative mobile IAP revenue exceeded \$32M, with the United States (22.7%) and Brazil (20.8%) as its largest revenue markets.

Monthly Global Website Visits Trend – Manus



Monthly Global Mobile IAP Revenue Trend – Manus



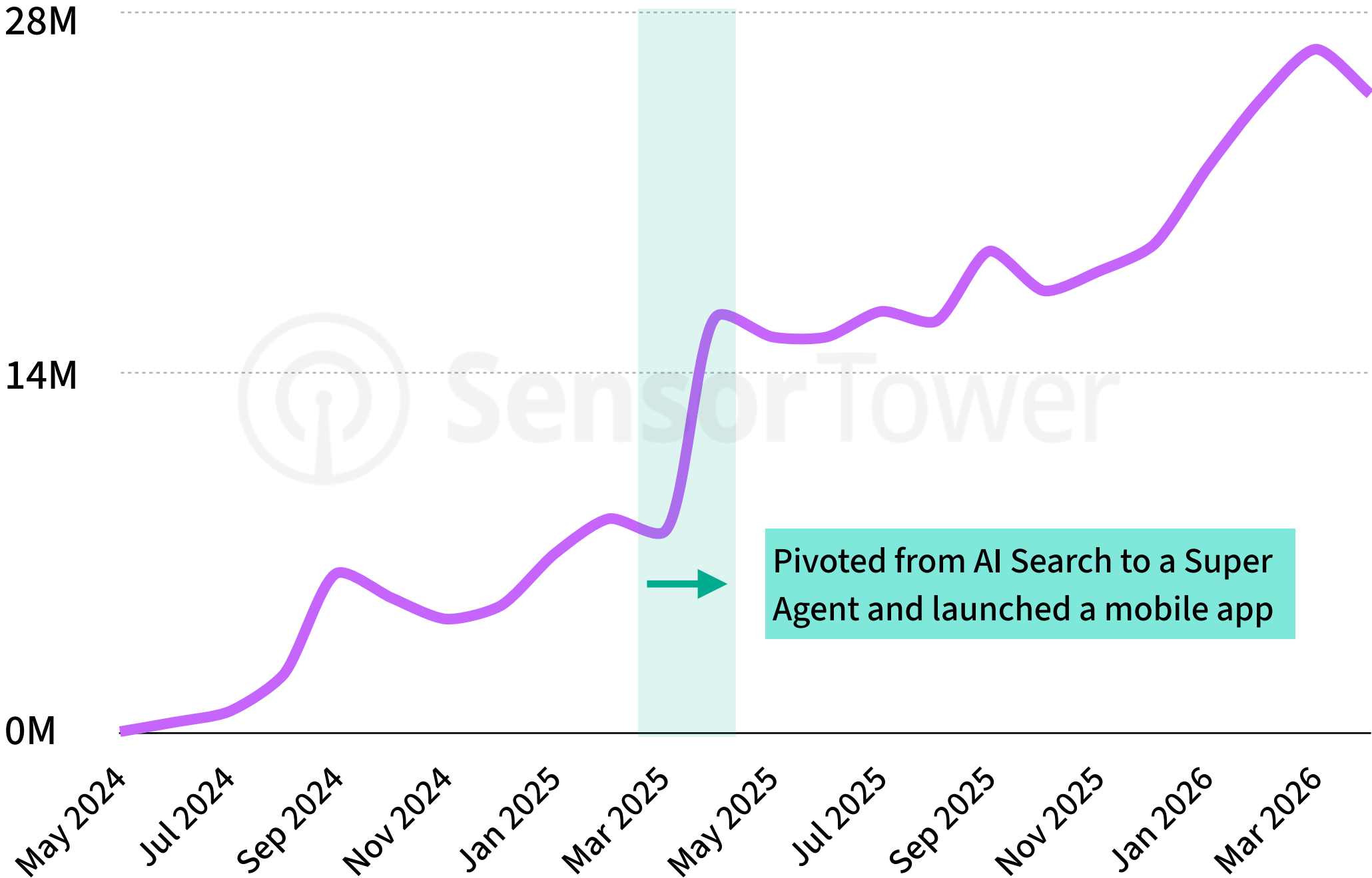


Genspark Successfully Pivots to a Super Agent, Driving Rapid Revenue Growth Through Focused Expansion in Japan and Korea

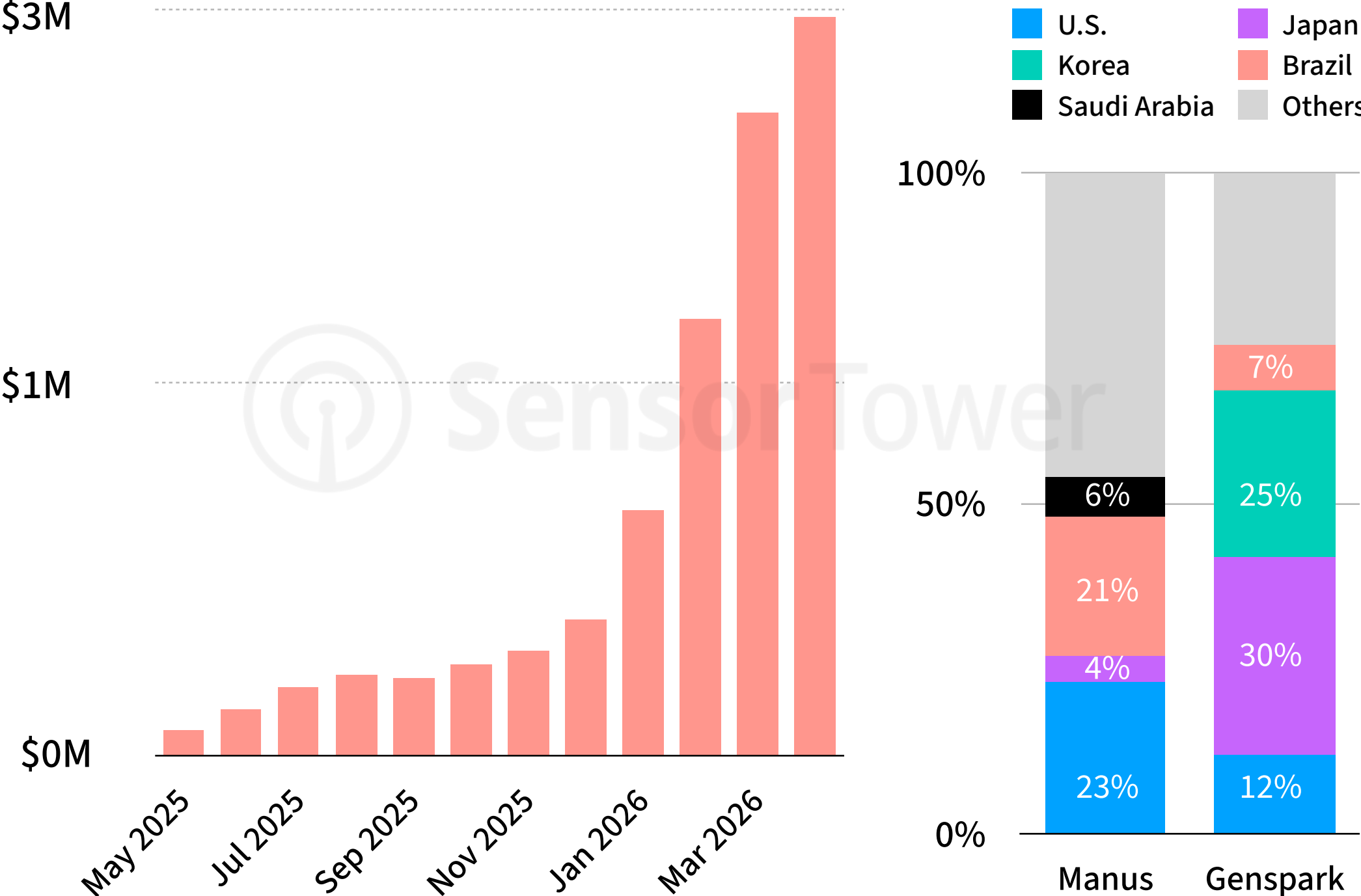
Source: Sensor Tower App Performance Insights & Web Insights

Genspark, developed by MainFunc, is an AI workspace and task execution platform. In April 2025, it pivoted from AI Search to a Super Agent + AI Workspace strategy, driving strong growth in both web traffic and mobile revenue. In 2026 Q1, Genspark mobile revenue surged 306% QoQ, with cumulative revenue approaching \$10M. Unlike Manus, Genspark has focused on Japan and South Korea, successfully ranking among the Top 5 AI apps by revenue in both markets during the quarter.

Monthly Global Website Visits Trend – Genspark



Monthly Global Mobile IAP Revenue Trend & Revenue Mix – Genspark

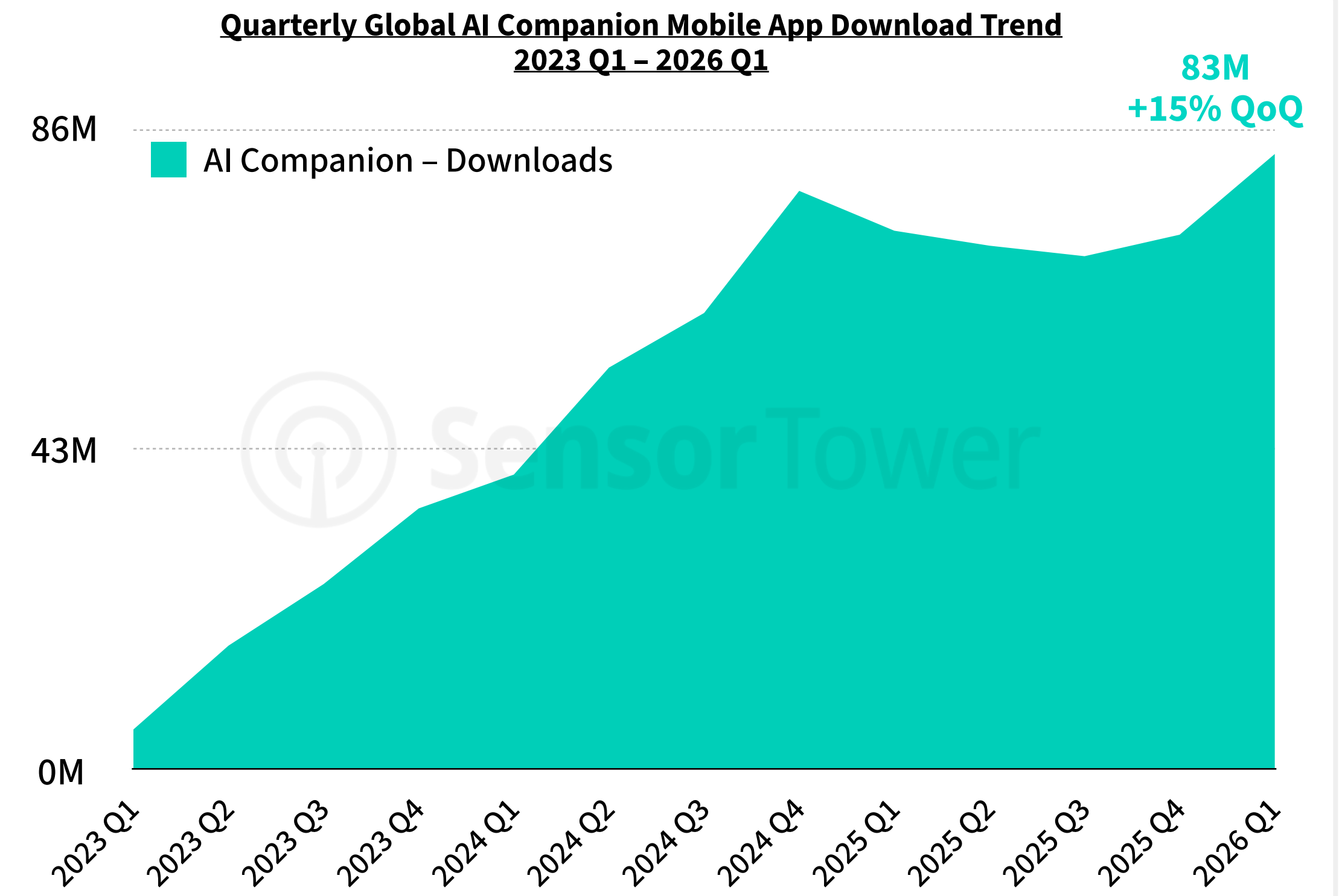
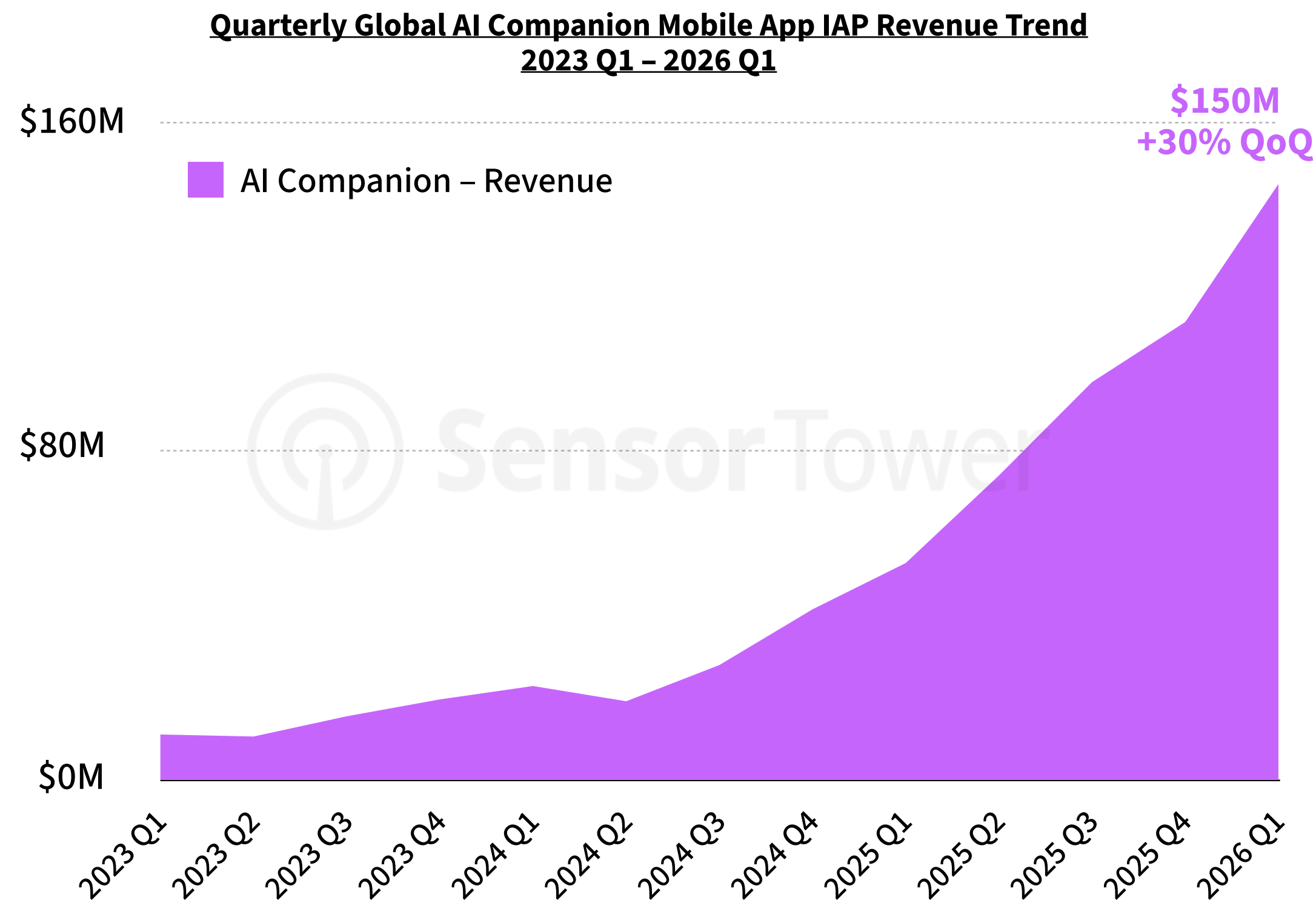




AI Companion Apps

AI Companion Apps: Revenue Growth Continues to Outpace User Growth as Demand Converts into Spending

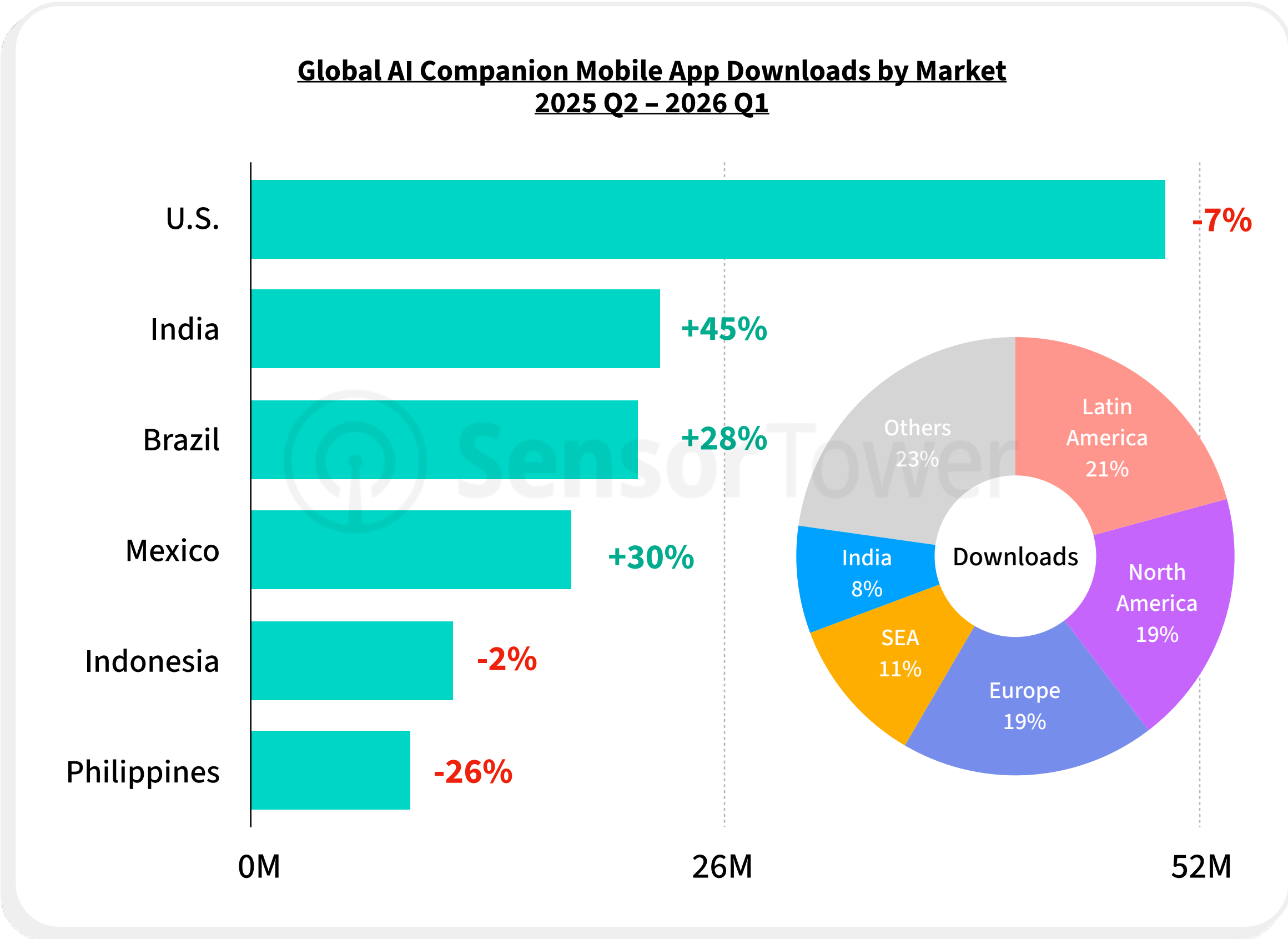
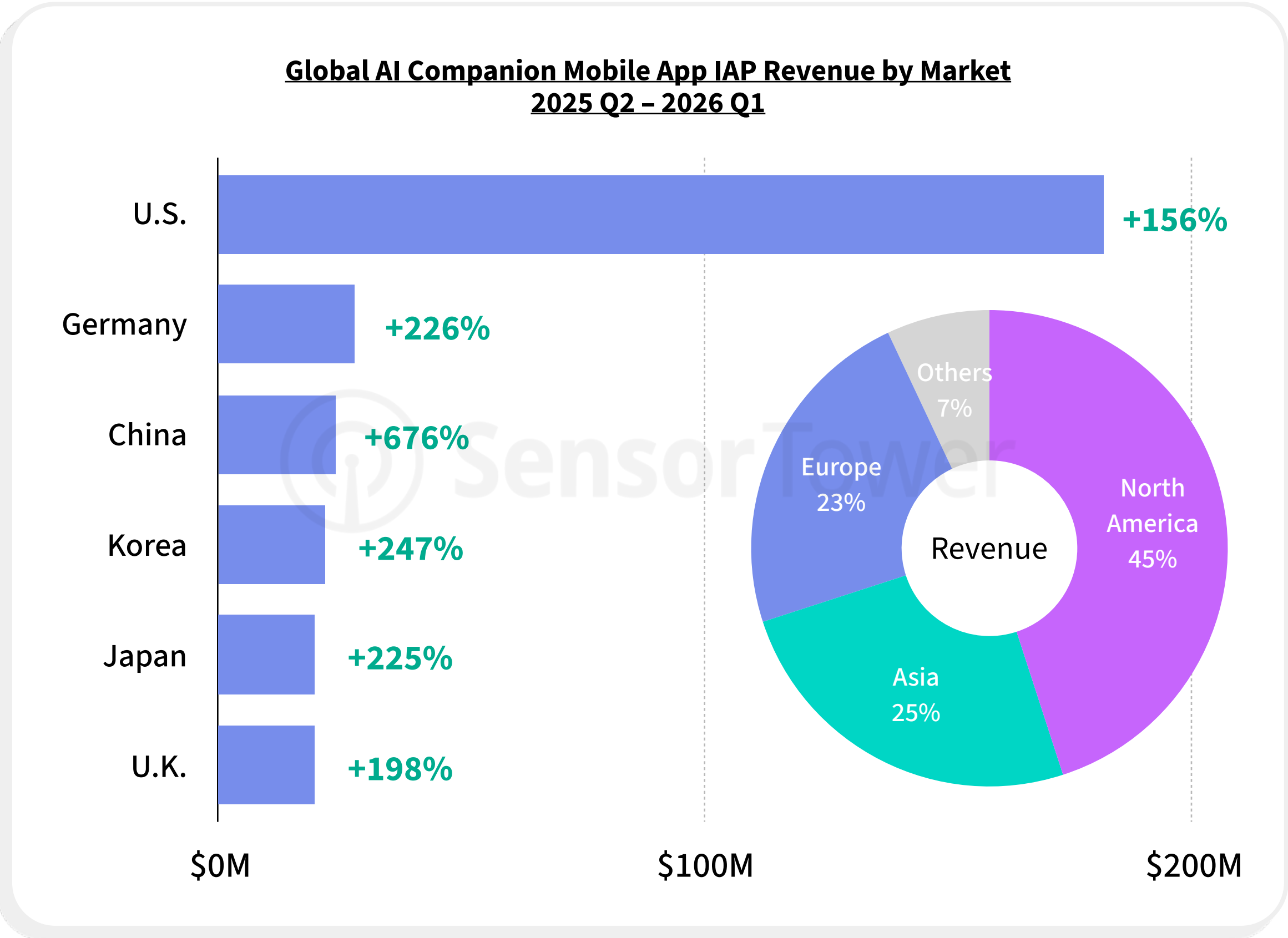
Source: Sensor Tower App Performance Insights



AI Companion apps have evolved into a mature app category, reaching \$150M in quarterly revenue in 2026 Q1 – more than 12x higher than 2023 Q1. Revenue growth continues to outpace user growth, signalling that demand for AI companionship is increasingly converting into paid behaviour, with subscriptions and virtual gifting driving higher monetisation and ARPU.

AI Companion Market Landscape: U.S. Drives 45% of Revenue While Europe and Asia Accelerate

Source: Sensor Tower App Performance Insights

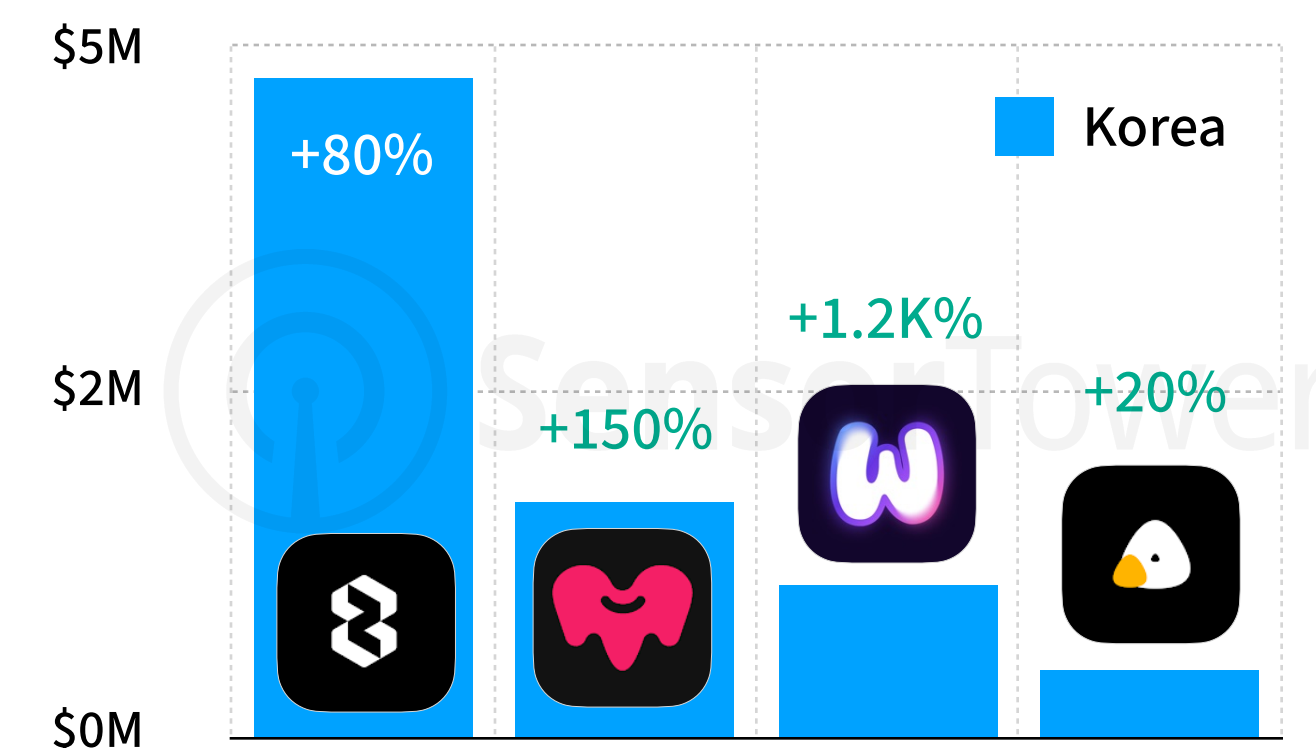
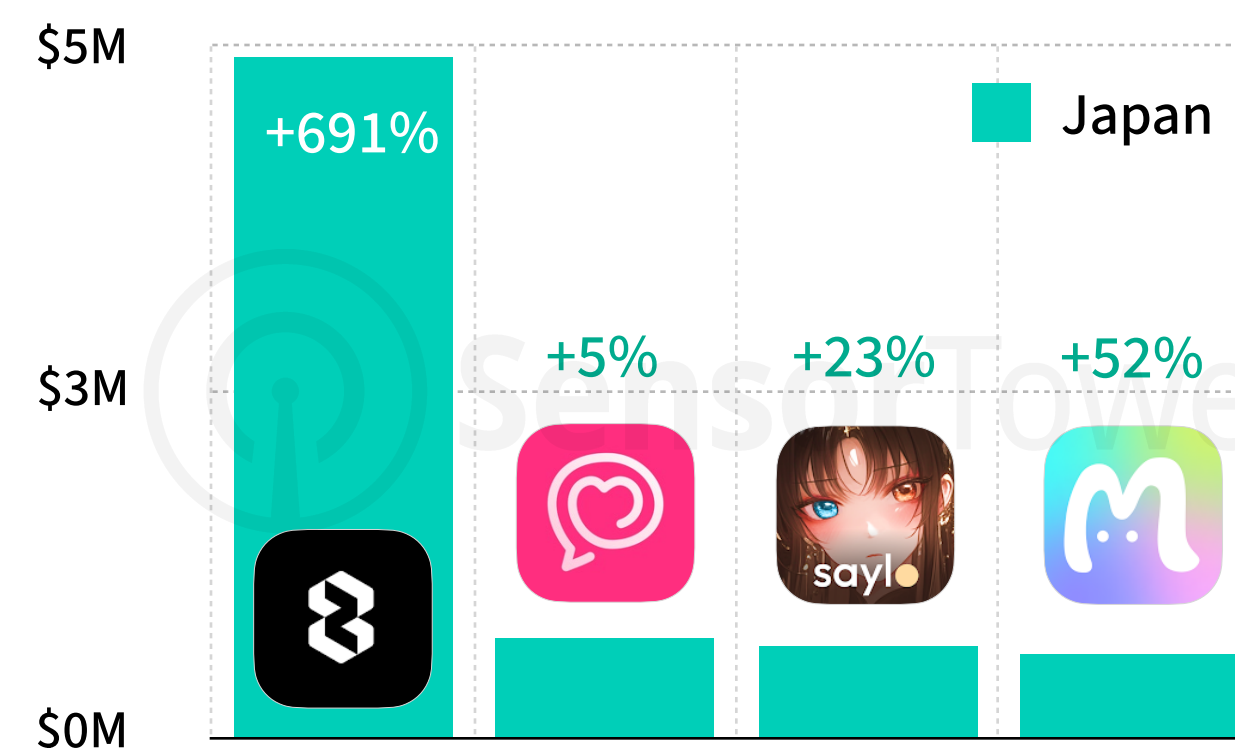
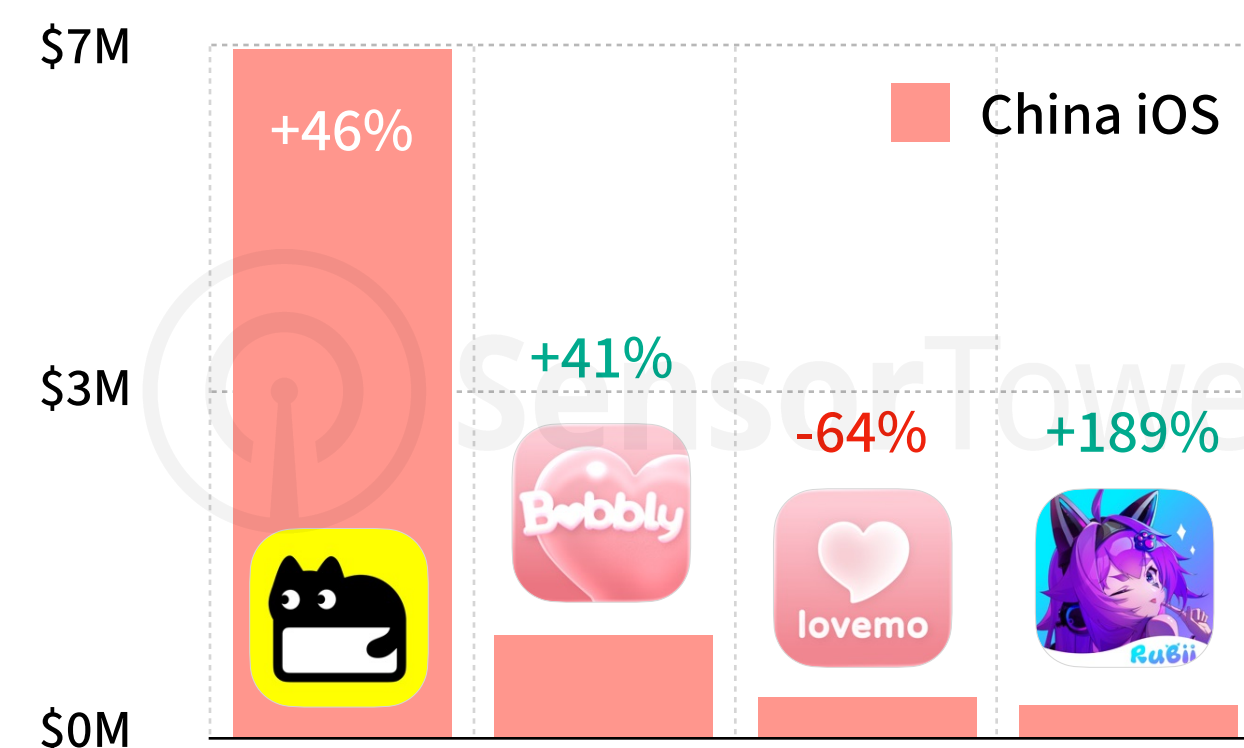
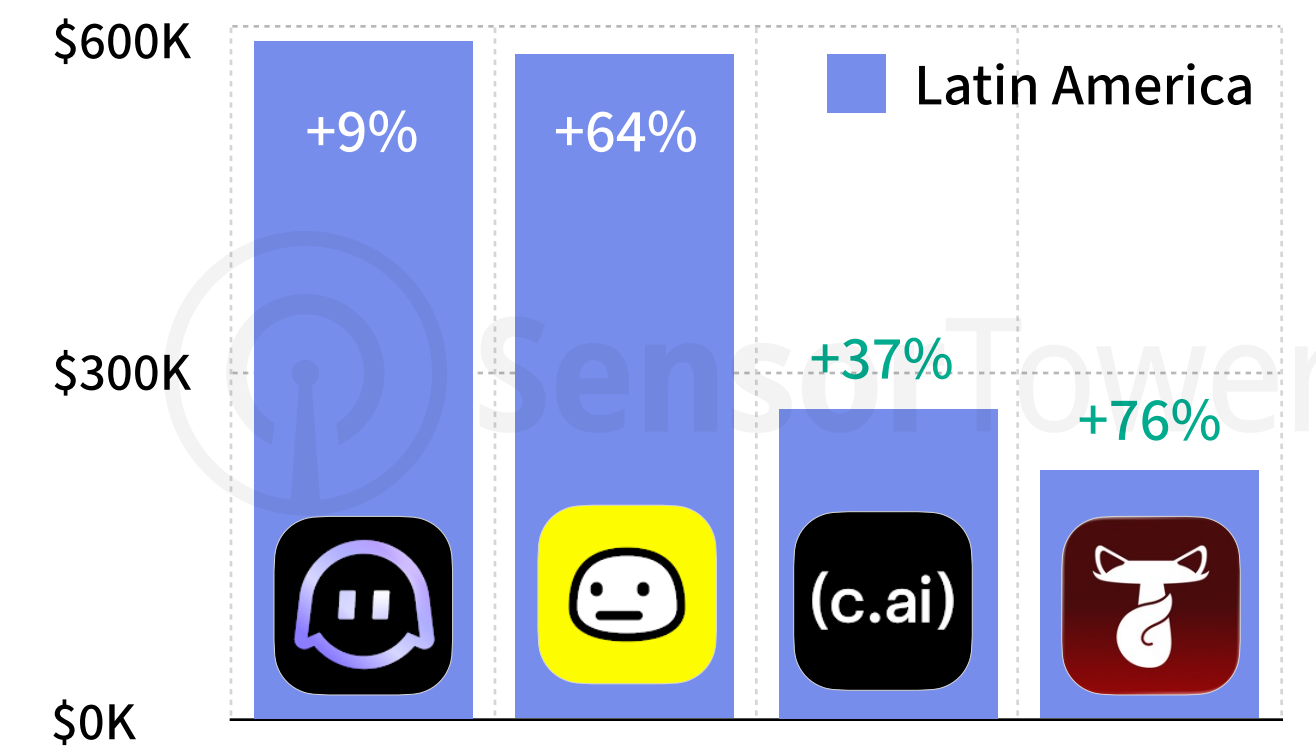
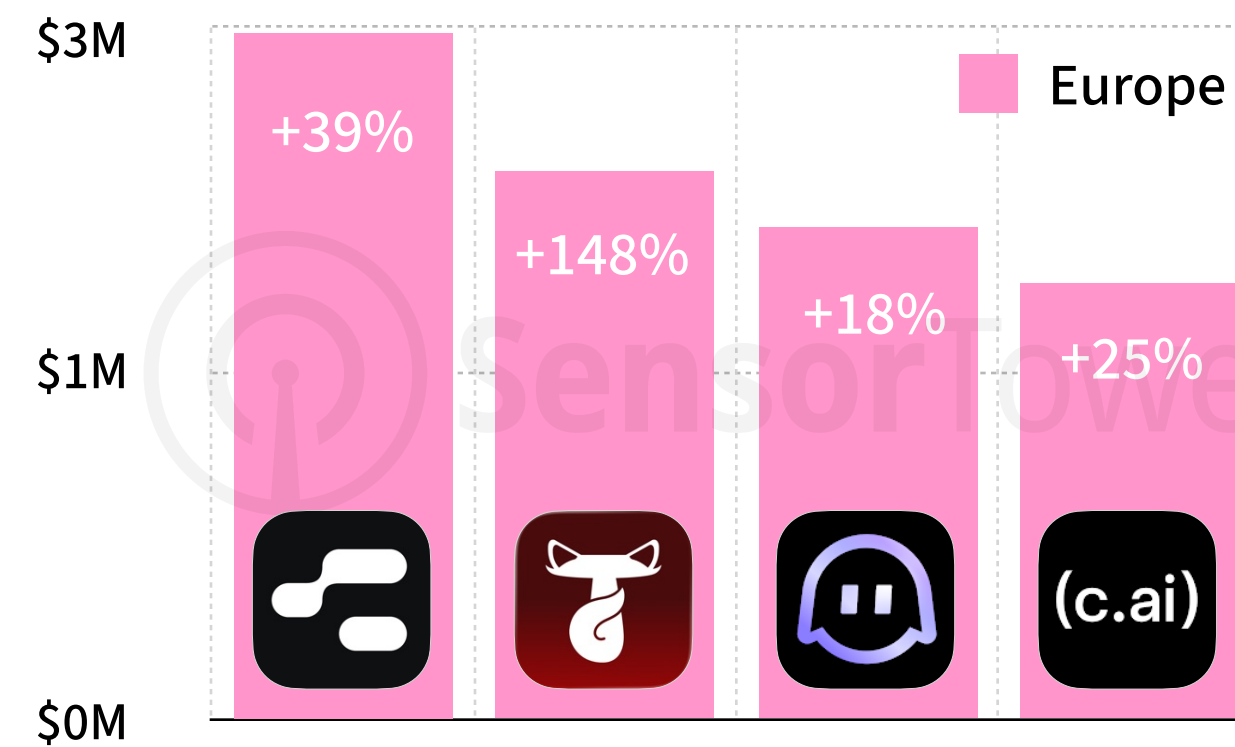
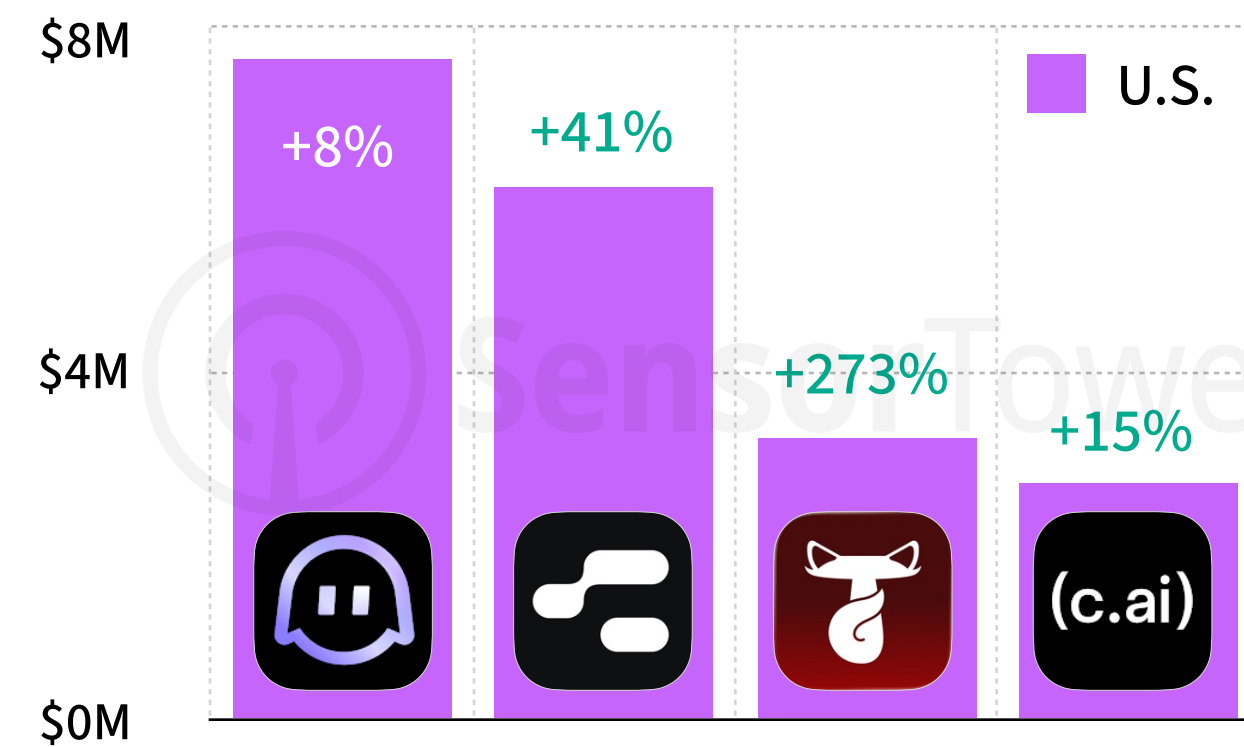


U.S. accounted for nearly 45% of global AI Companion revenue, supported by strong monetisation and leading ARPU levels. Meanwhile, China, South Korea, Japan, Germany and the U.K. all posted revenue growth exceeding 200%, highlighting rising demand across international markets. On the download side, growth has shifted toward emerging markets, with India, Brazil and Mexico leading expansion. Latin America contributed 21% of global downloads, reinforcing its role as a key growth region for AI Companion apps.

Zeta Surges 691% in Japan While PolyBuzz and CHAI Lead the U.S. AI Companion Market

Source: Sensor Tower App Performance Insights

Note: Revenue rankings represent the Top 4 AI Companion apps by revenue in each market for 2026 Q1.

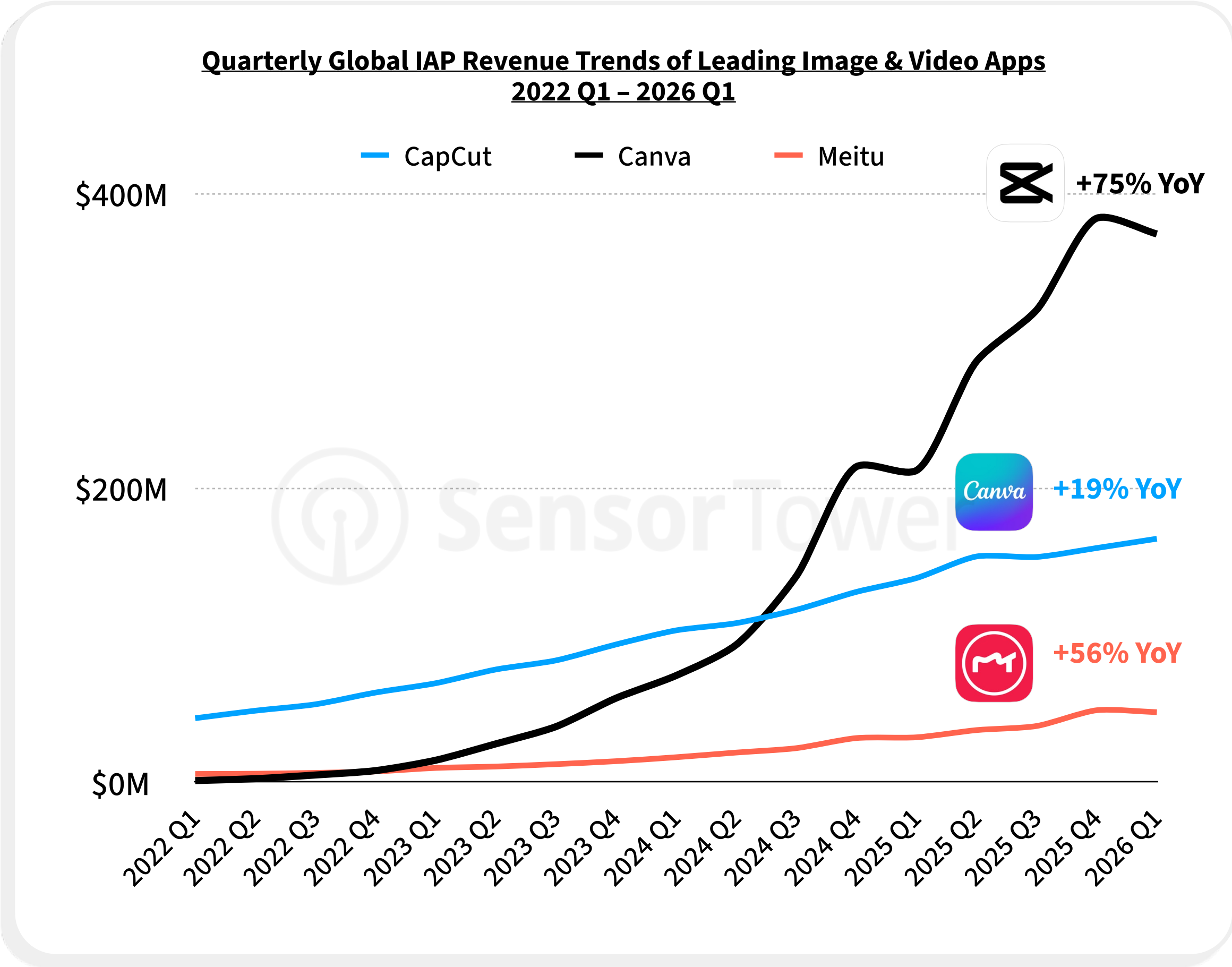
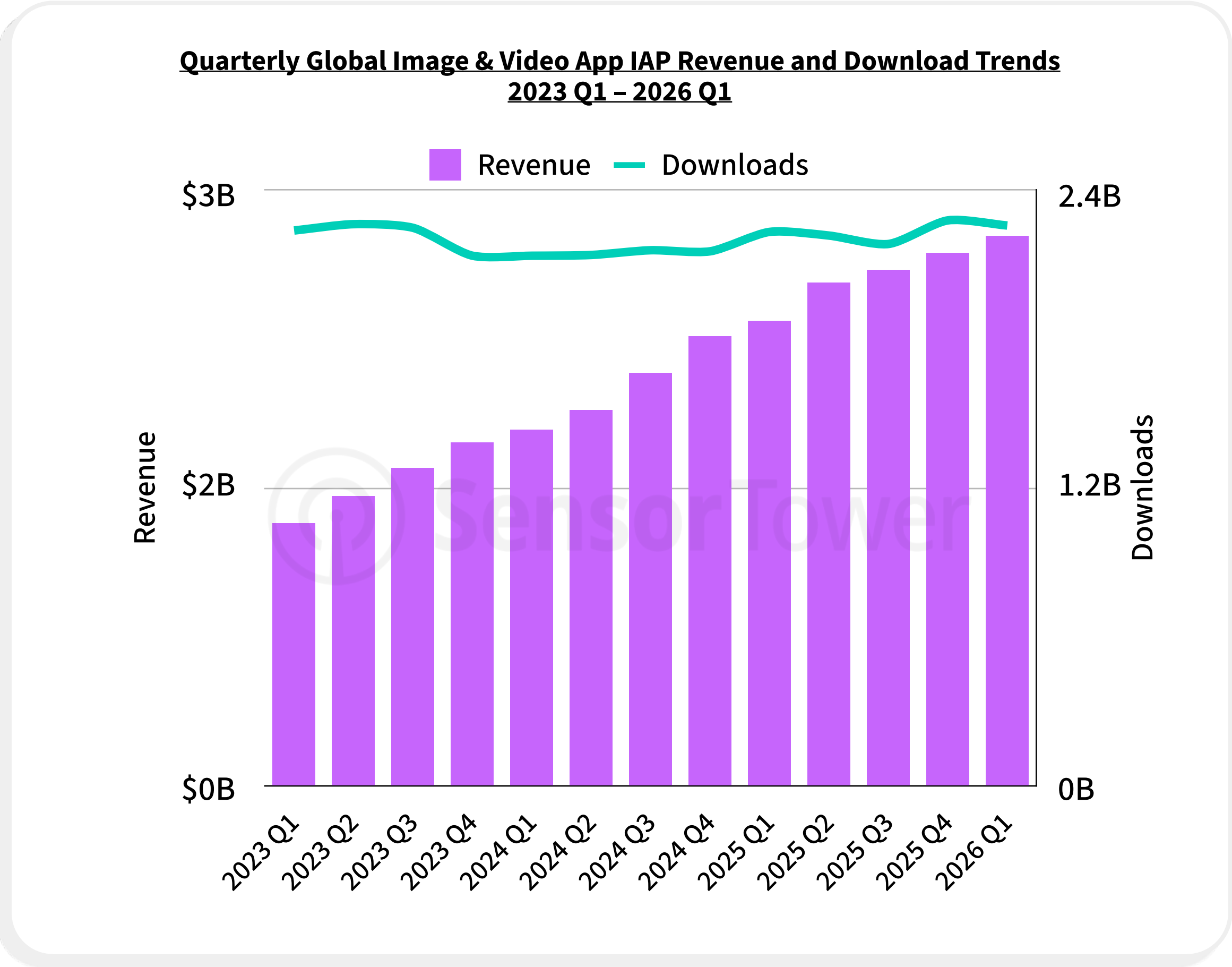


AI Video and Image Apps



Image & Video Apps Fully Embrace AI as Global Revenue Reaches New Highs

Source: Sensor Tower App Performance Insights

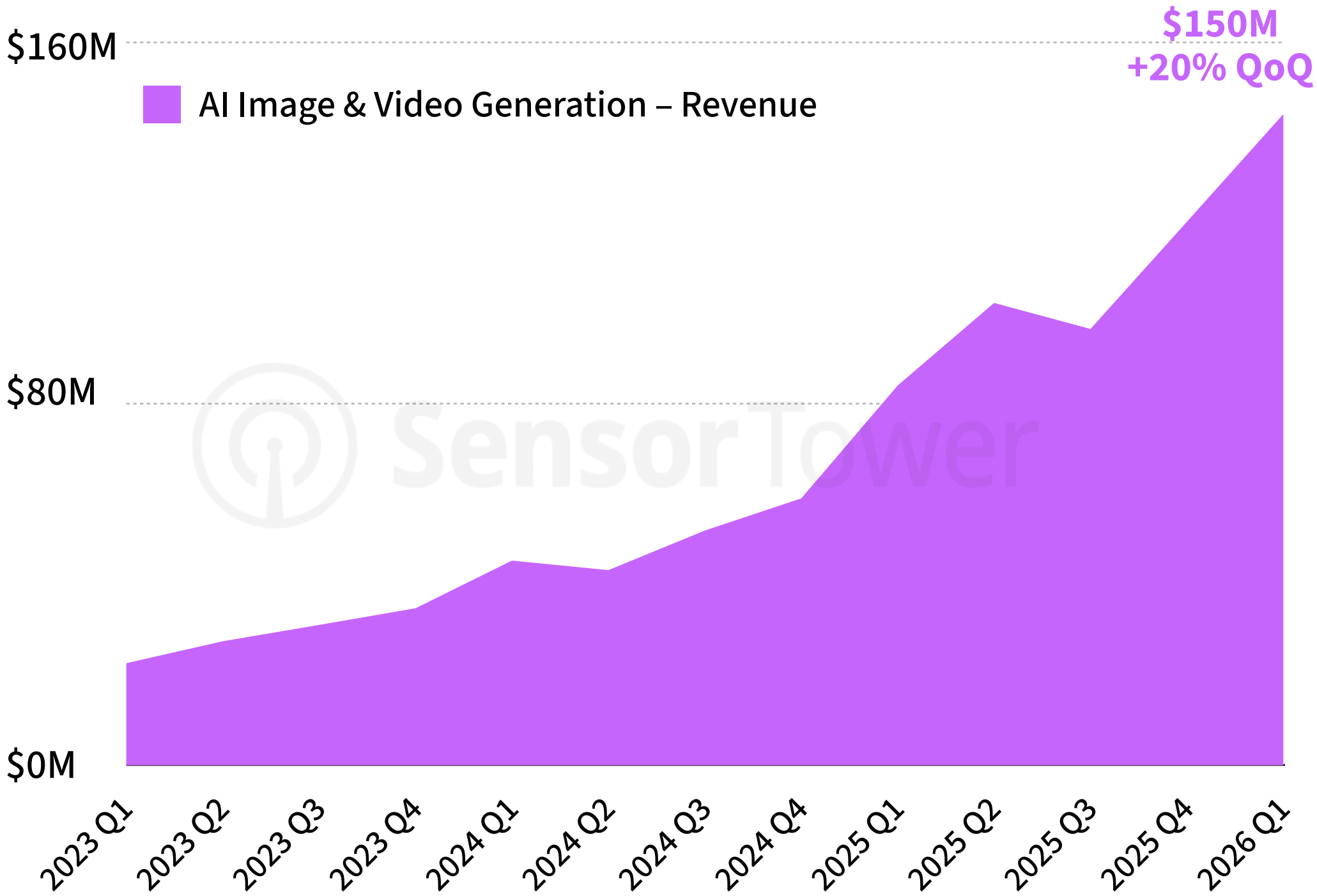


Global image and video app downloads have largely plateaued, but revenue has nearly doubled since 2023 as the category shifts from user acquisition to monetisation. With AI now embedded across the category, premium AI features have become a key growth driver. In 2026 Q1, global IAP revenue reached \$2.8B (+18% YoY), while CapCut, Canva, and Meitu posted revenue growth of 75%, 19%, and 56% YoY, respectively.

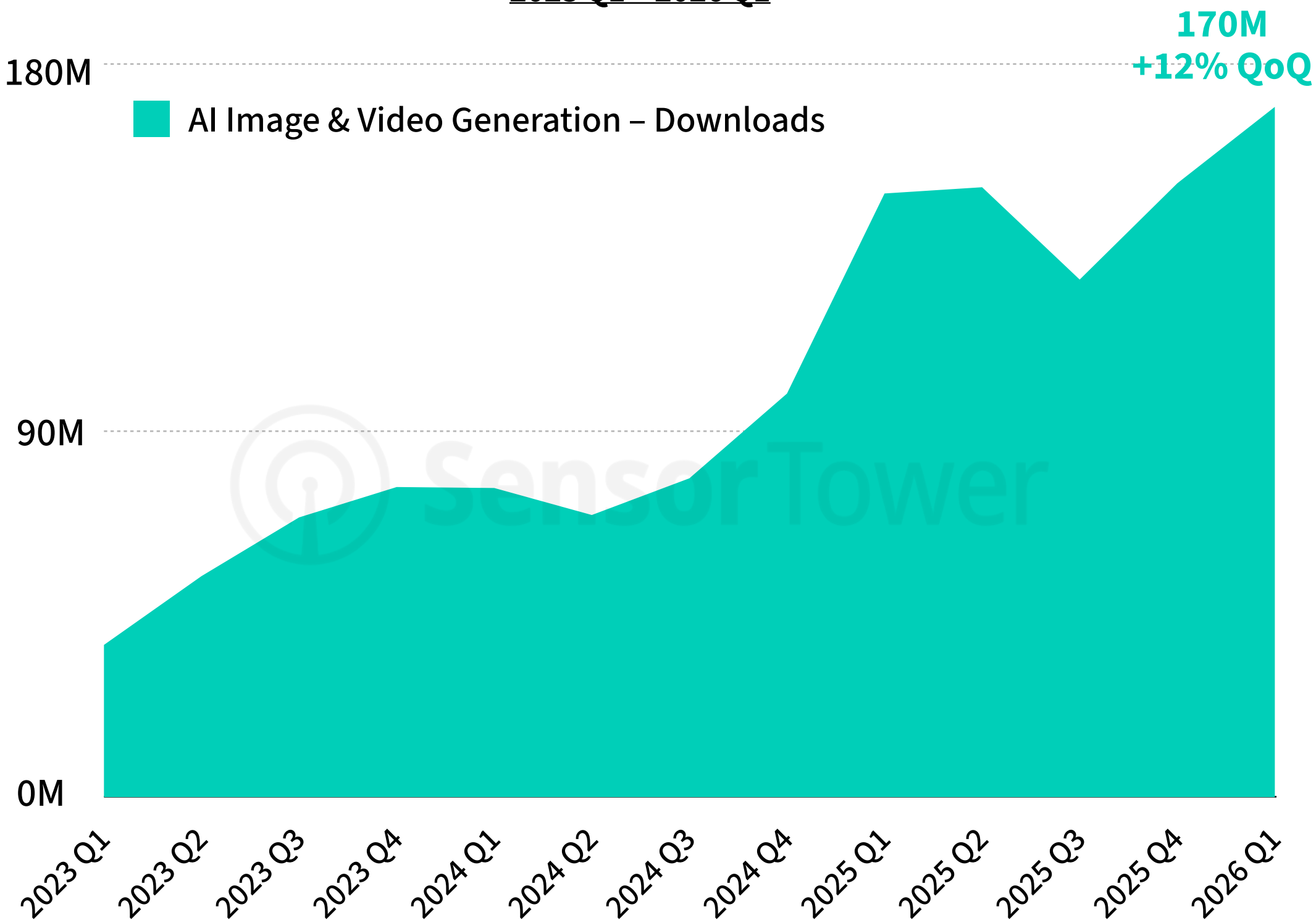
AI Image & Video Generation Apps: Revenue and Downloads Continue to Surge

Source: Sensor Tower App Performance Insights

Quarterly Global AI Image & Video Generation App IAP Revenue Trend
2023 Q1 – 2026 Q1



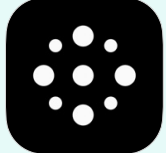
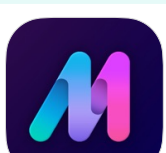
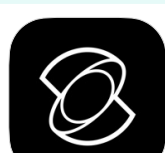
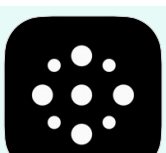
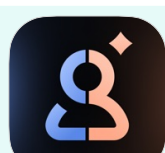
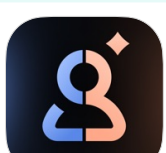
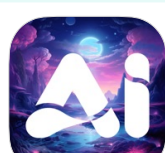
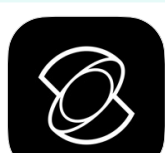
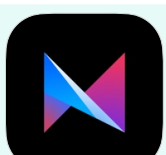
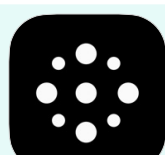
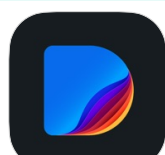
Quarterly Global AI Image & Video Generation App Download Trend
2023 Q1 – 2026 Q1



AI Image & Video Generation apps continue to deliver strong growth in both revenue and downloads. In 2026 Q1, quarterly revenue reached \$150M while downloads climbed to 170M, up 20% and 12% QoQ, respectively. With sustained momentum across both user acquisition and monetisation, the category remains one of the fastest-growing segments within the AI app ecosystem.

Leading AI Image & Video Generation Apps: Kling AI and PixVerse Top Revenue and Download Rankings

Source: Sensor Tower App Performance Insights
Note: Rankings reflect global performance from January 1 – March 31, 2026, based on downloads, revenue, active users, and website visits.

	Revenue		Downloads		Active Users		Web Traffic	
1		Kling AI Beijing Kwai Technology		PixVerse PixVerse		PixVerse PixVerse		CapCut capcut.com
2		AI Video HubX		vivago.ai Sparkling Innovations		AI Mirror Polyverse		Perchance perchance.org
3		Pose Spark Dynamic		Kling AI Beijing Kwai Technology		即梦AI ByteDance		Higgsfield AI higgsfield.ai
4		即梦AI ByteDance		即梦AI ByteDance		Arvin IdeaLabs		Civitai civitai.com
5		AI Mirror Polyverse		AI Catch QuVideo		Kling AI Beijing Kwai Technology		Picsart picsart.com
6		AI Catch QuVideo		AI Video HubX		GIO Prequel		Midjourney midjourney.com
7		GIO Prequel		AI Hub Vitality AI		AI Photo Video Editor Smart AI DEV		Kling AI klingai.com
8		Momo HubX		Hailuo AI MiniMax		AI Video HubX		SeaArt AI seaart.ai
9		AI Photo Video Editor Smart AI DEV		AI Art Magic Momenwes Global		DaVinci HubX		PixAI pixai.art
10		Hailuo AI MiniMax		Pose Spark Dynamic		vivago.ai Sparkling Innovations		HeyGen heygen.com

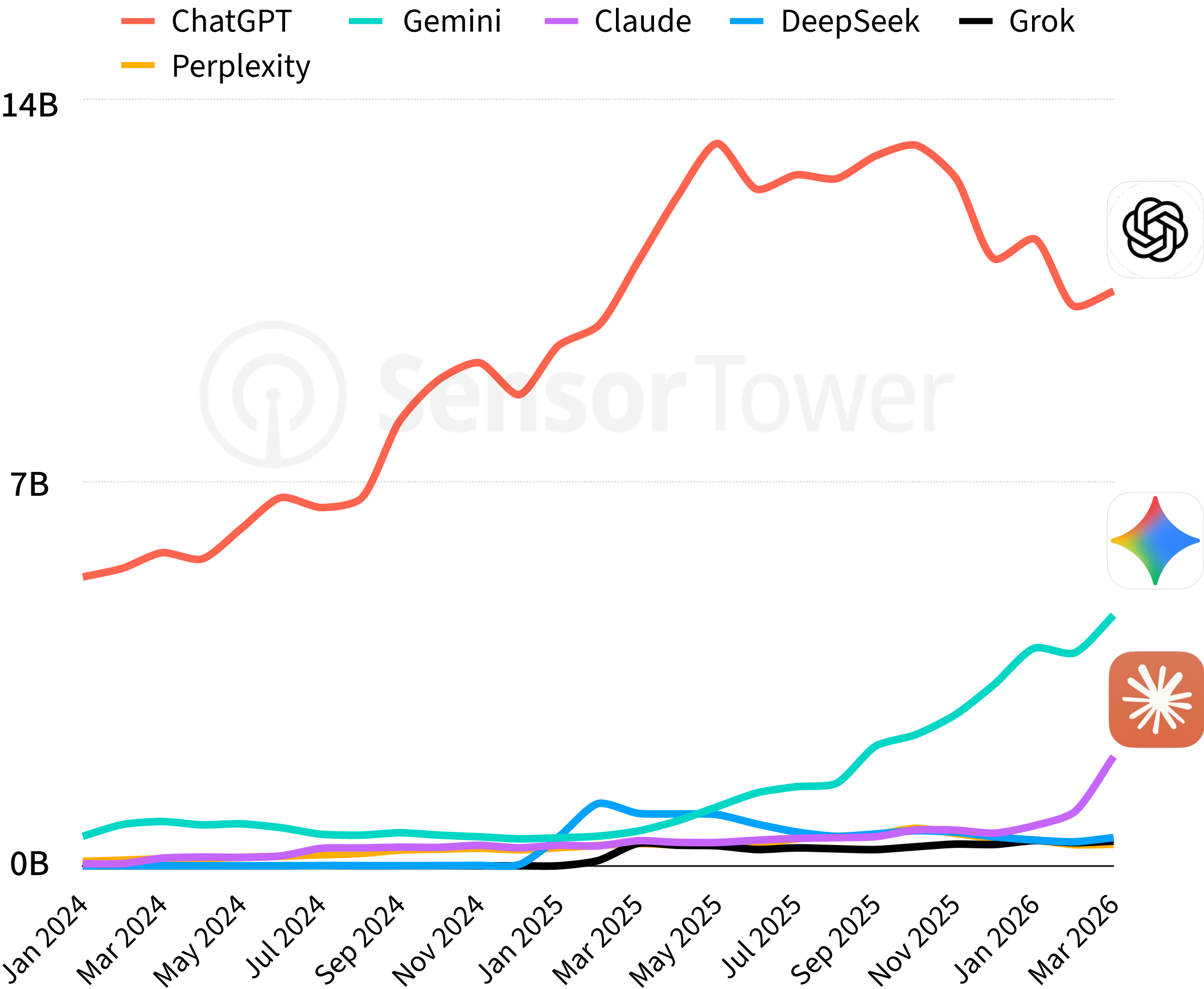


AI App Web Insights

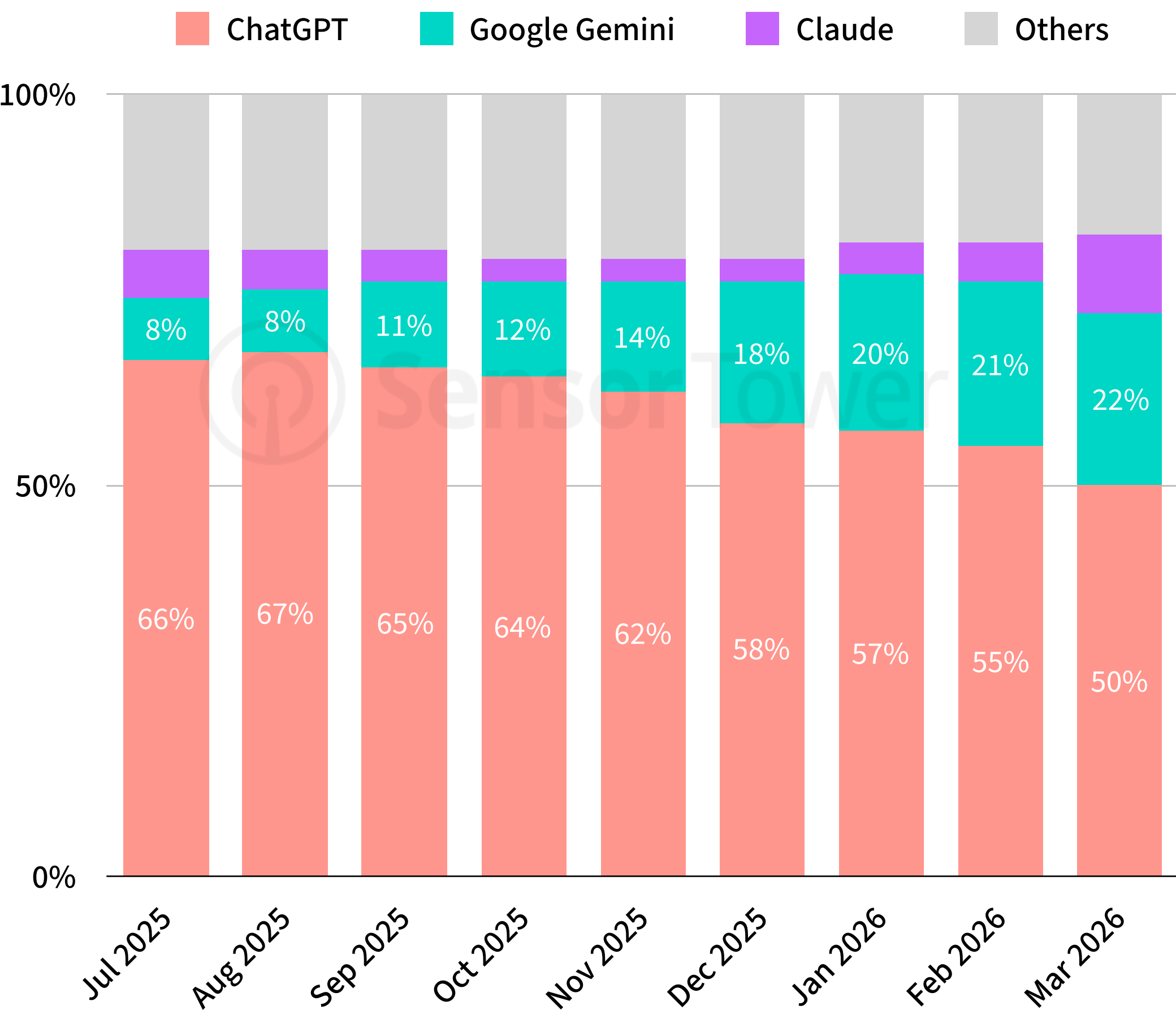
Gemini and Claude Gain Ground as ChatGPT's Web Traffic and Market Share Decline

Source: Sensor Tower Web Insights

Monthly Website Traffic Trend of Leading Gen AI Platforms
Jan 2024 – Mar 2026

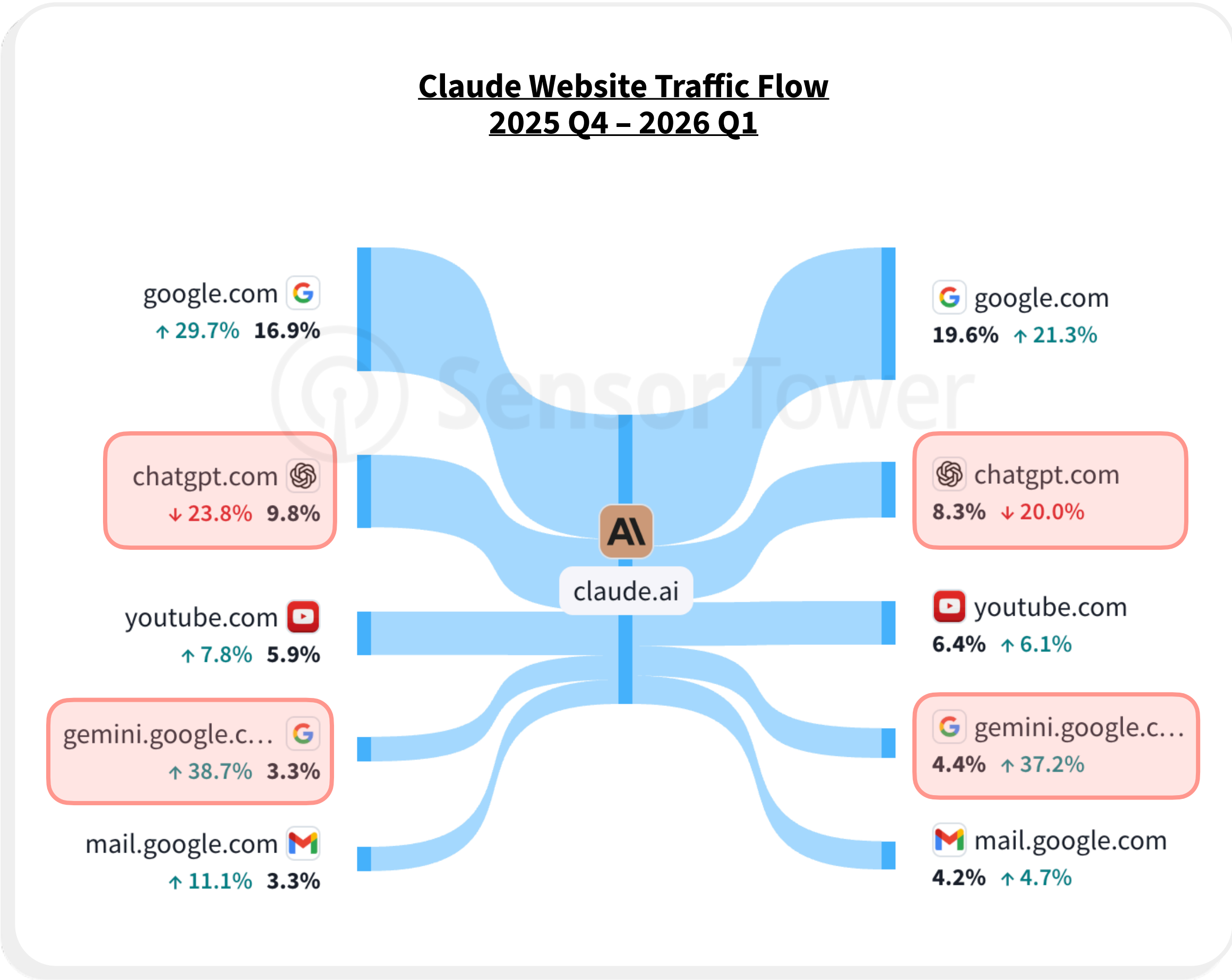
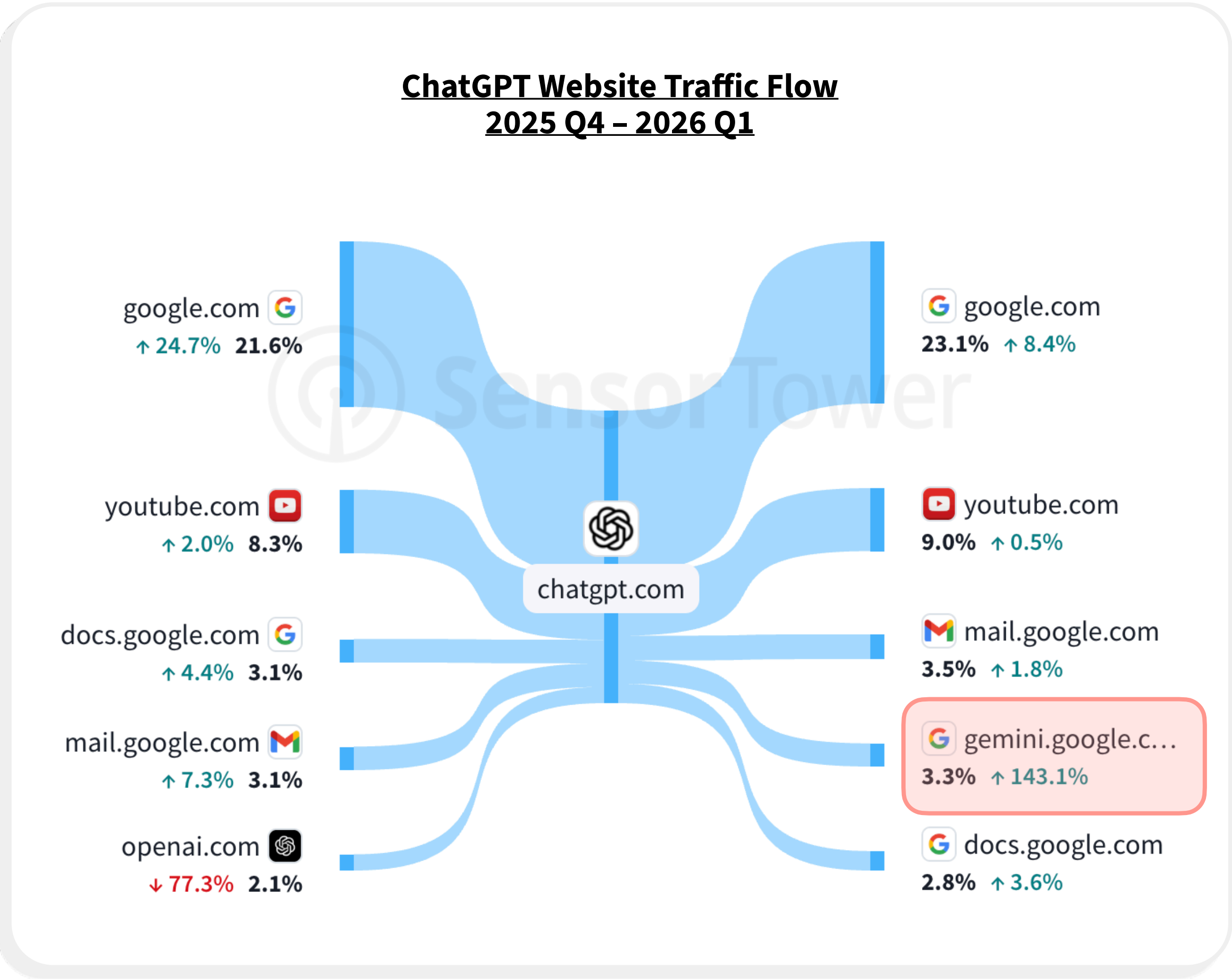


Website Traffic Market Share Trend of Leading Gen AI Platforms
Jul 2025 – Mar 2026



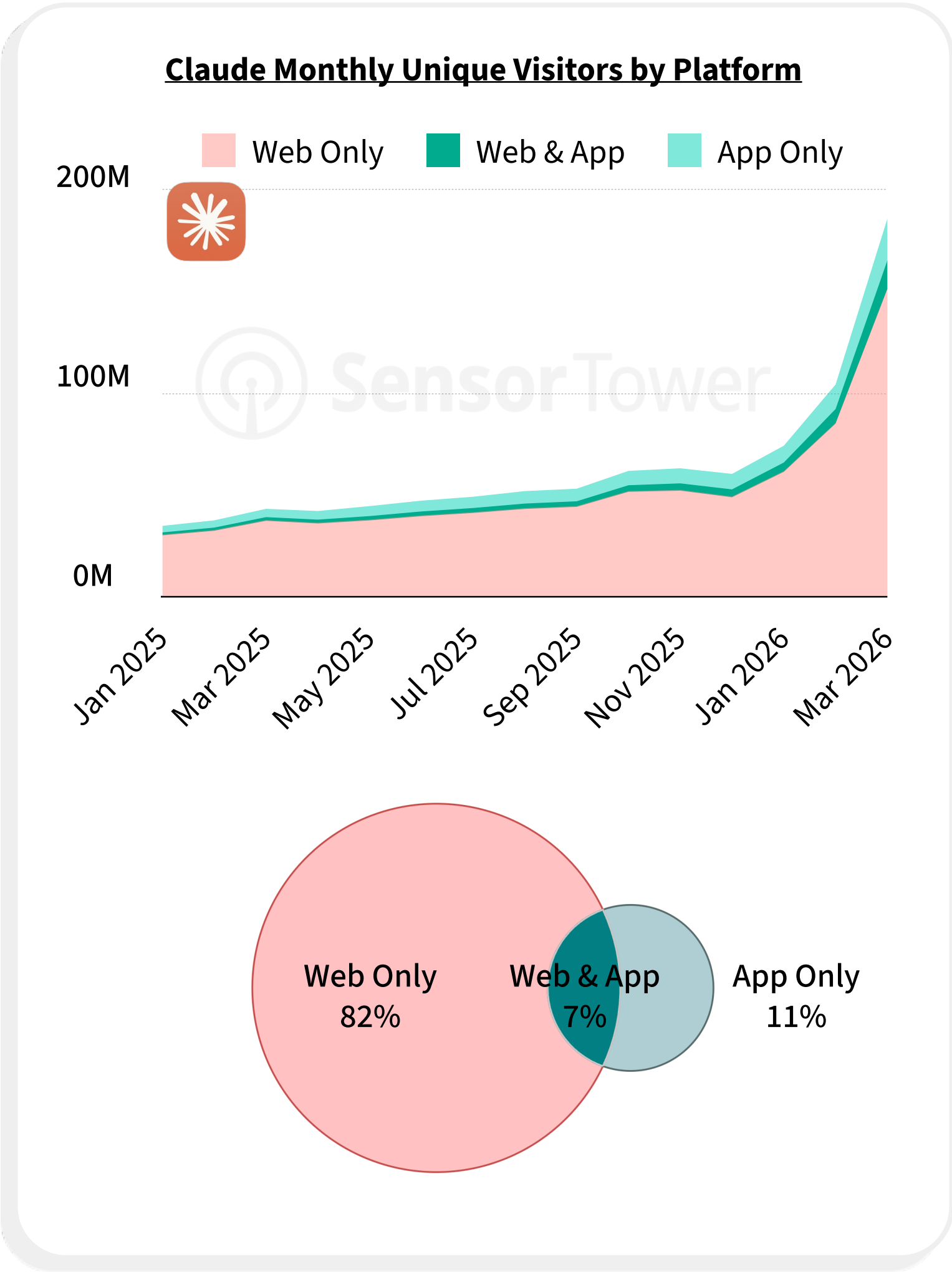
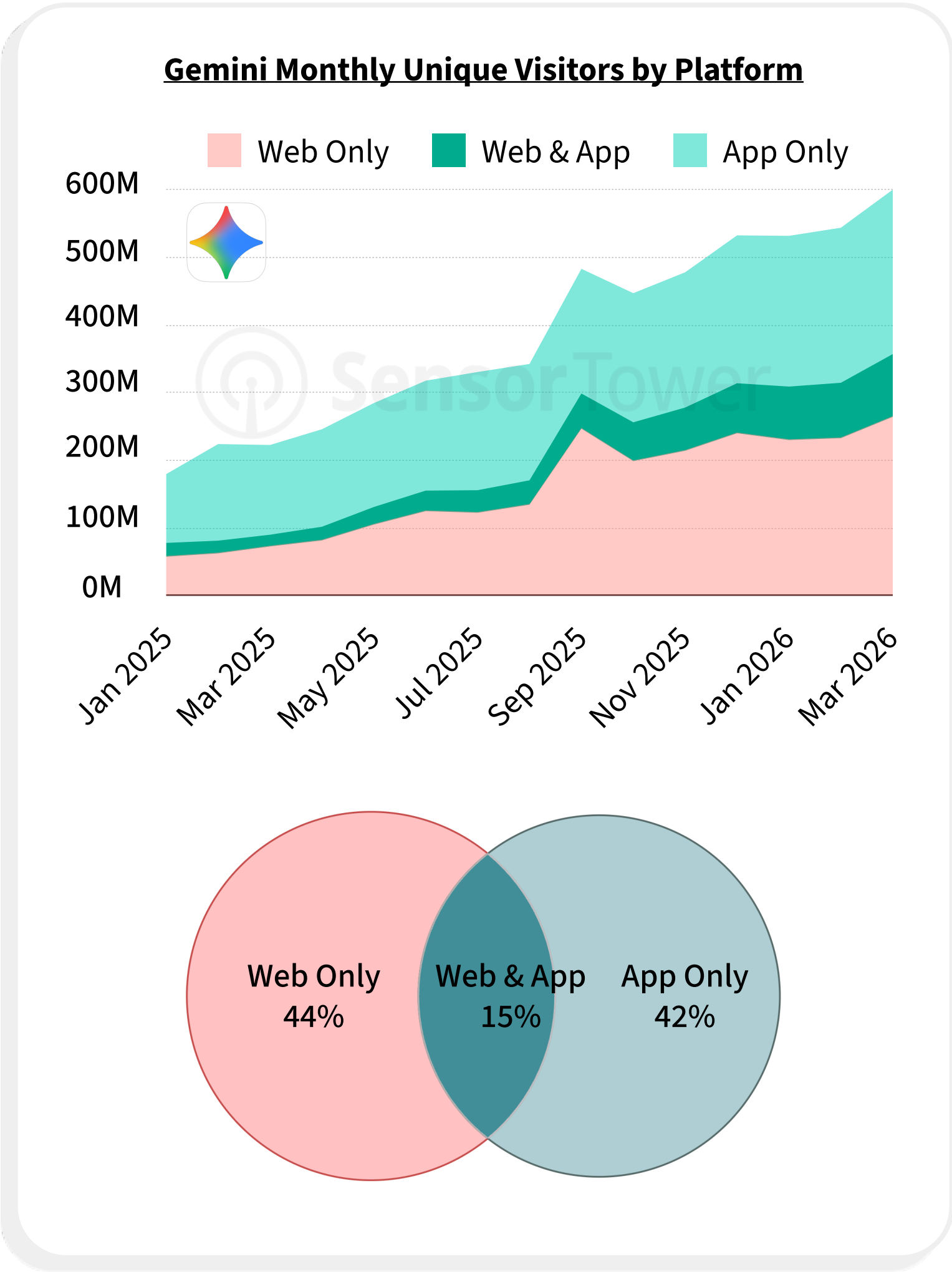
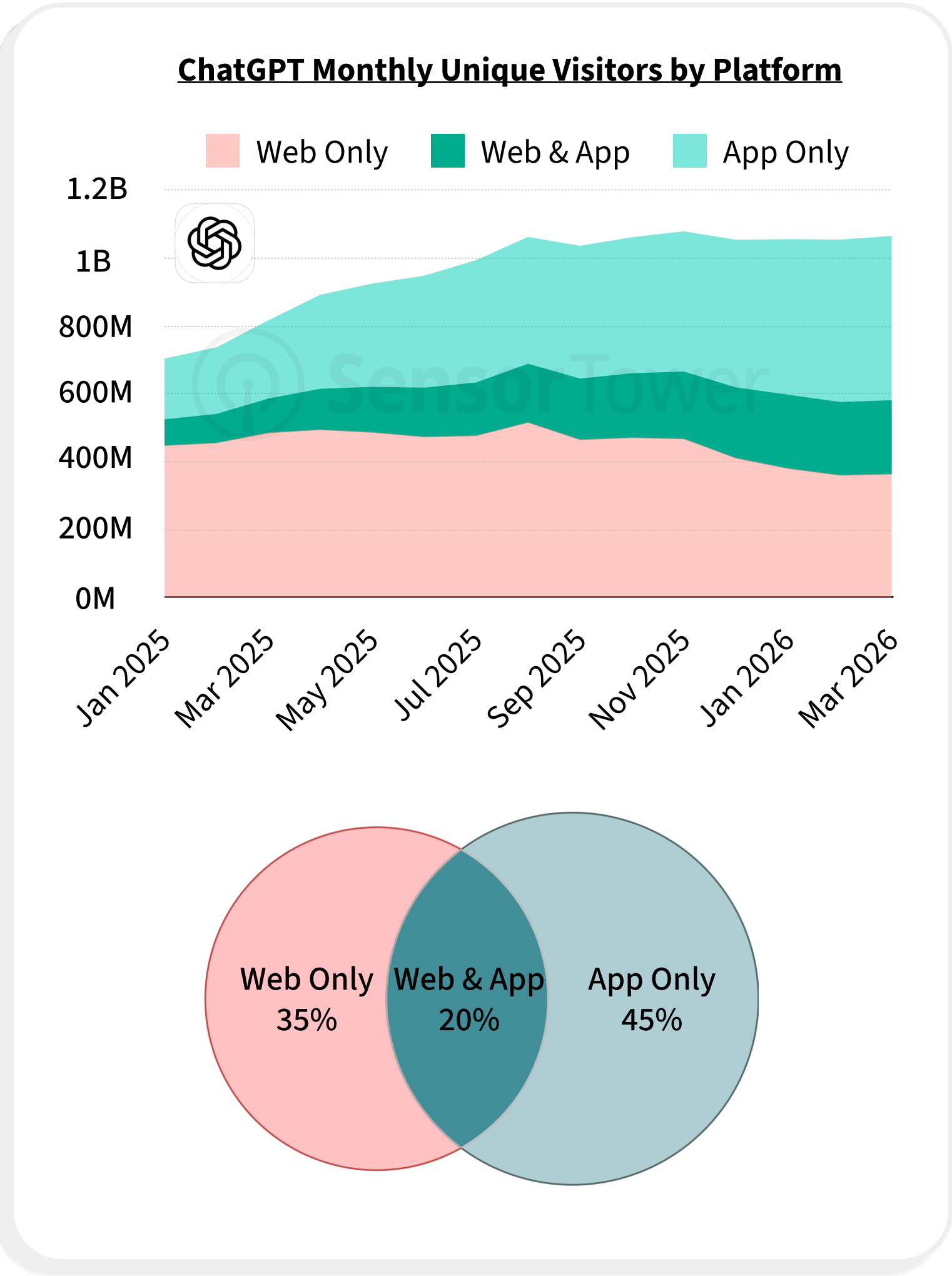
Industry Competitive Landscape: Gemini Takes Share from ChatGPT While ChatGPT and Gemini Become Key Traffic Sources for Claude

Source: Sensor Tower Web Insights



ChatGPT Surpasses 1B Monthly Unique Visitors While Claude’s Growth Remains Predominantly Web-Based

Source: Sensor Tower Web Insights

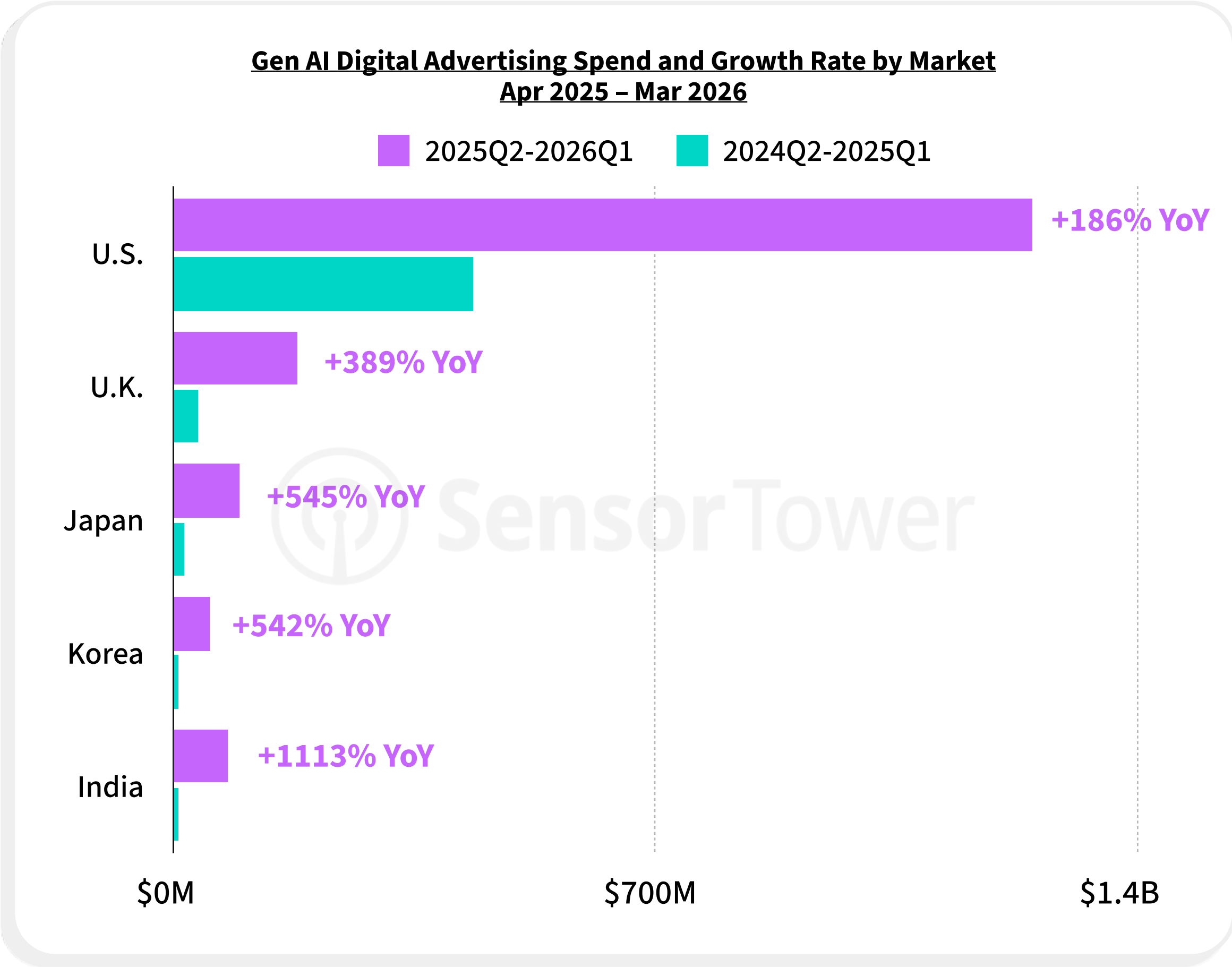
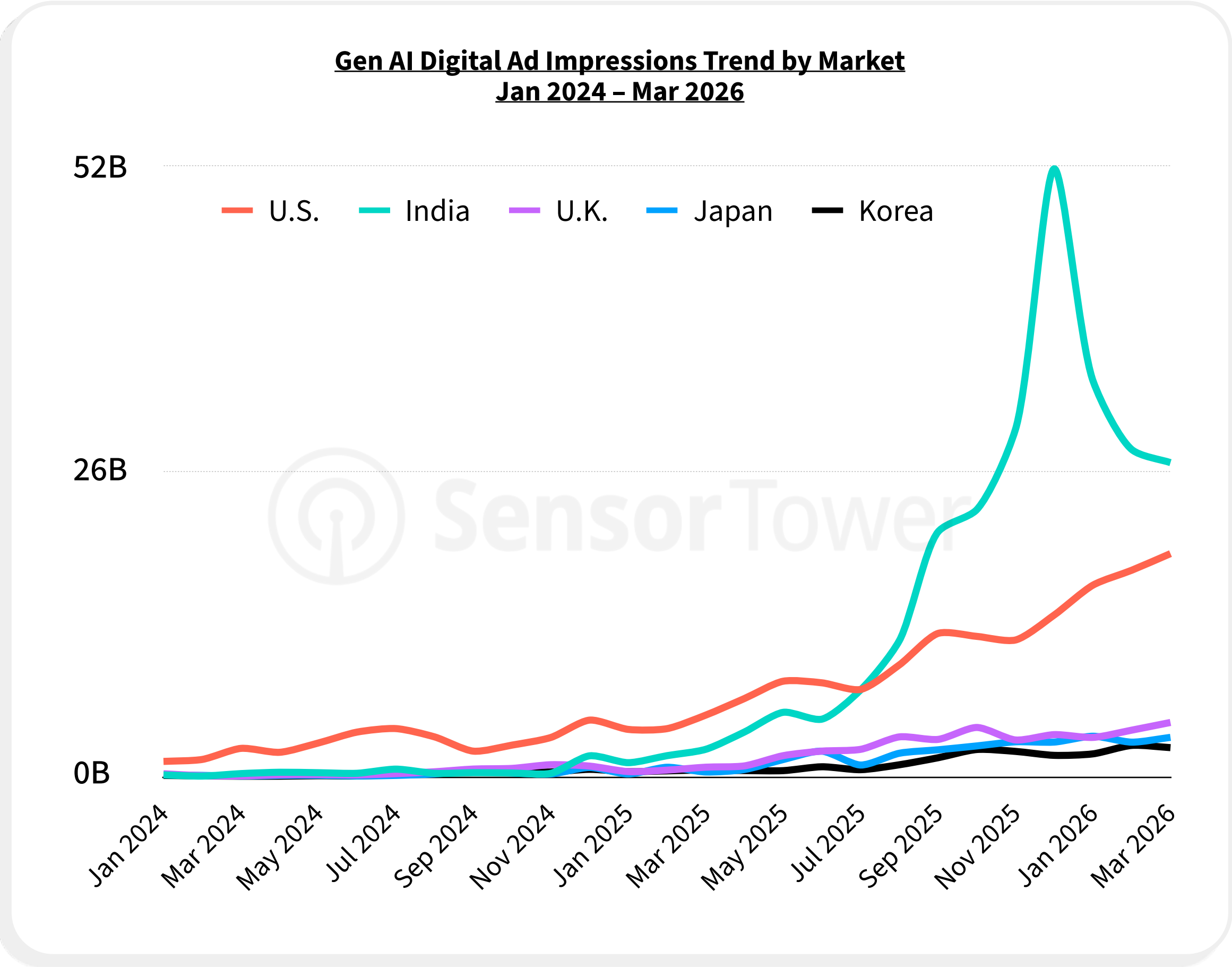




AI App Digital Advertising Insights

Gen AI Advertising Spend and Impressions Are Growing Exponentially

Source: Sensor Tower Pathmatics Digital Advertising Insights



Gen AI advertising investment is accelerating globally. Between Apr 2025 and Mar 2026, AI ad spend in the U.S. grew 186% YoY, reaching \$1.25B, while the U.K., Japan, South Korea and India recorded even faster growth. India emerged as the fastest-growing market, with AI ad spend increasing 1,113% YoY. This surge was driven in part by aggressive campaigns from AI productivity tools such as Wispr AI, helping propel AI advertising impressions across the market.

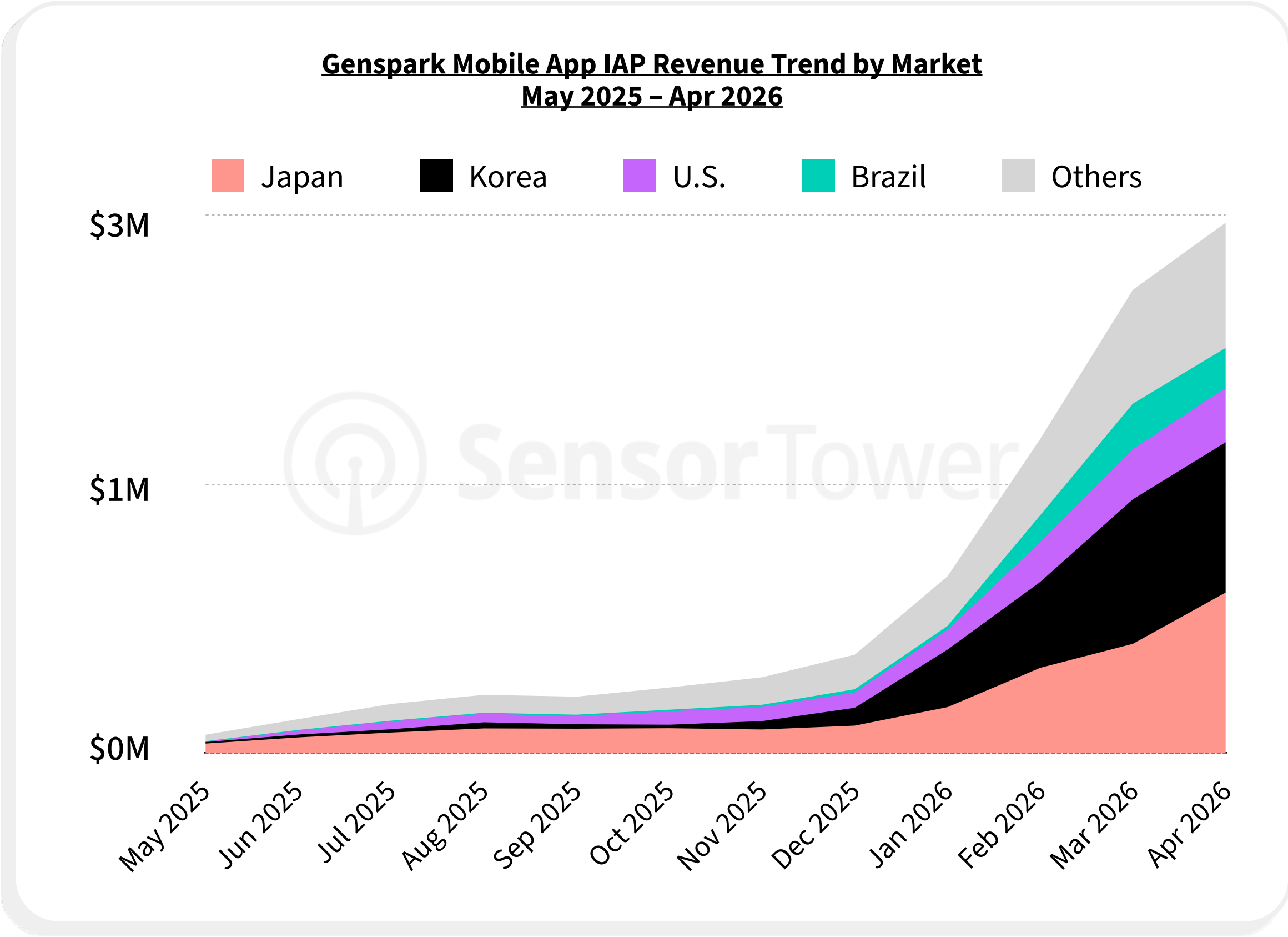
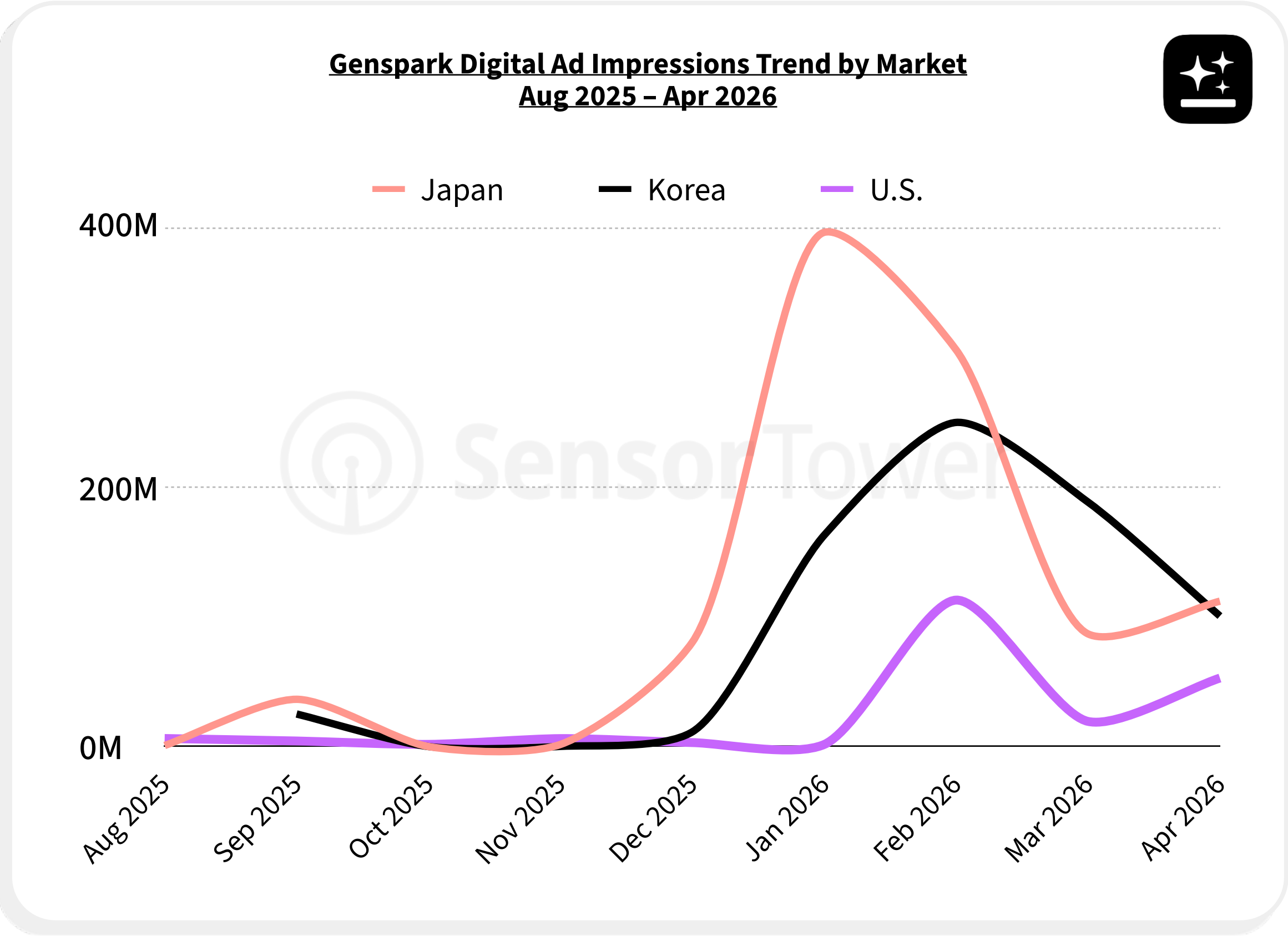
OpenAI, Google AI, Claude and Dola Lead Global AI Advertising Spend; AI Coding, Companions, Voice, Education, Agents and Video Become Key Growth Categories

Source: Sensor Tower App Performance Insights
Note: Top 10 Generative AI Advertisers by Digital Ad Spend, Jan–Mar 2026

	U.S.	Japan	Korea	India	Indonesia	Thailand	U.K.	AI Foundation Models
1	OpenAI	OpenAI	OpenAI	OpenAI	OpenAI	Base44	OpenAI	AI Coding
2	Claude (Anthropic)	Base44	Wrtn	Google AI	Dola AI	OpenAI	Microsoft Copilot	AI Companion
3	Google AI	MindCruiser	Base44	Wispr AI	Google AI	Dola AI	Dola AI	AI Voice
4	Base44	Scatter Lab	Genspark AI	ElevenLabs	Wispr AI	Replit	Google AI	AI Education
5	Microsoft Copilot	Genspark AI	Google AI	Course Hero	ElevenLabs	ElevenLabs	Base44	AI Agents
6	Replit	Google AI	Replit	Bohrium	Bohrium	Hello Group	Claude (Anthropic)	AI Video Generation
7	Cursor (Anysphere)	Replit	Dola AI	X Studios	Luma AI	Google AI	Replit	
8	Character.AI	Hello Group	Scatter Lab	Luma AI	Kimi AI	HUBX	ElevenLabs	
9	Genspark AI	HUBX	UnivAI	AI Scanner	Kilo Code	Qianfan	Cursor (Anysphere)	
10	Chai Research	Dola AI	ElevenLabs	MiniMax	X Studios	X Studios	Polybuzz	

Genspark Accelerates Ad Investment Across Japan, Korea and the U.S., Driving Rapid Mobile Revenue Growth

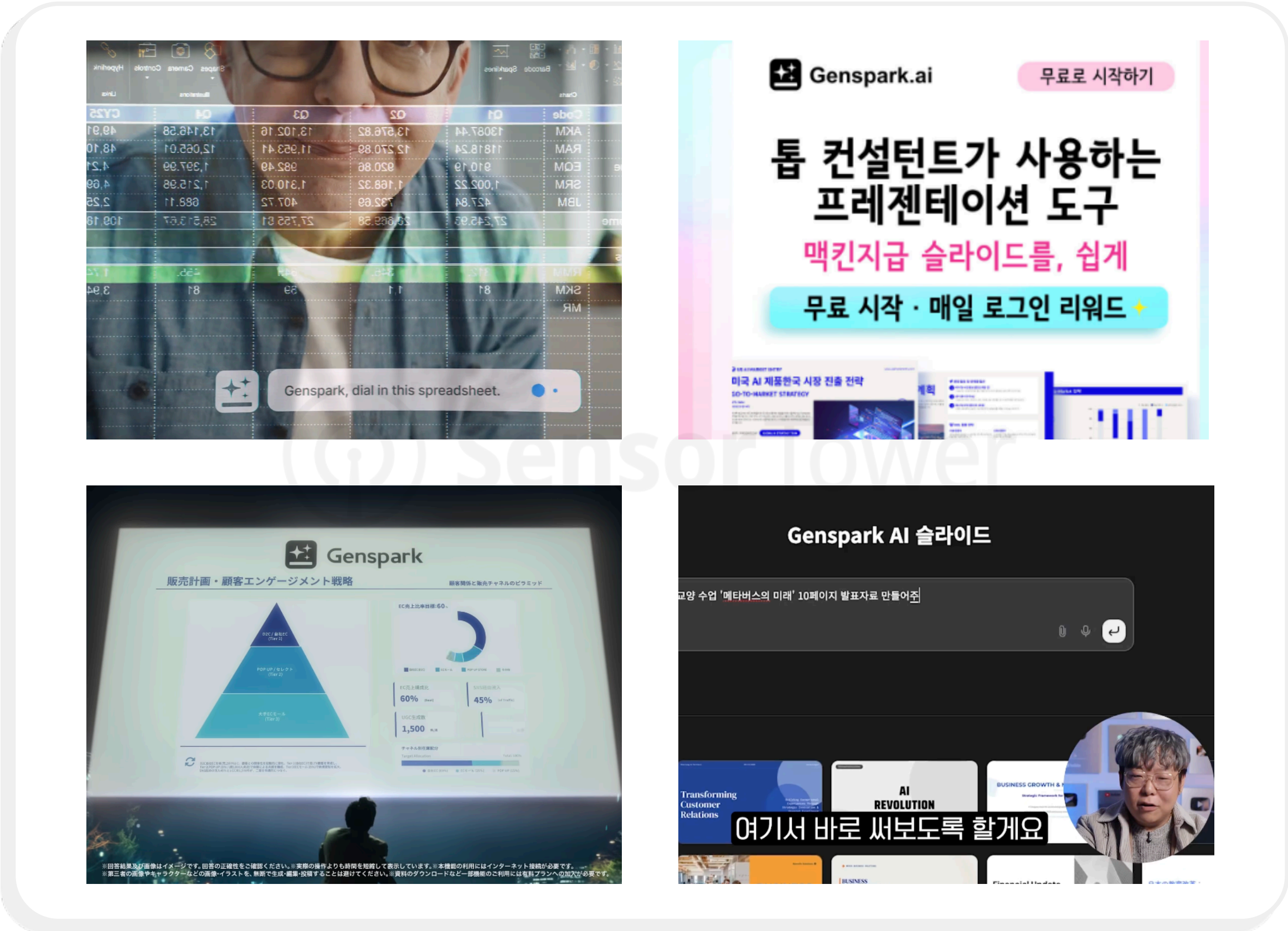
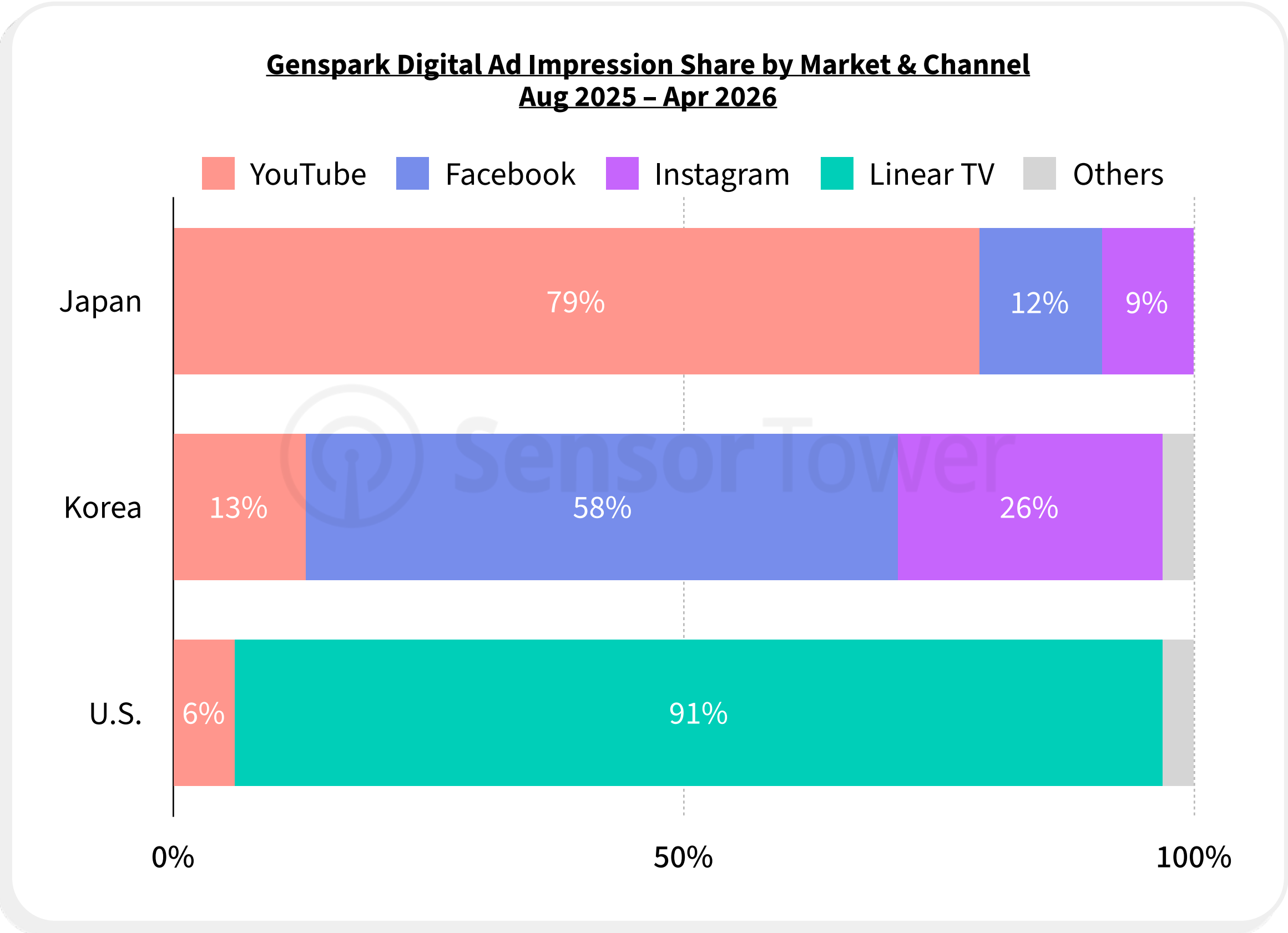
Source: Sensor Tower Pathmatics Digital Advertising Insights



Following its transition from an AI search engine to a Super Agent platform, Genspark significantly increased digital advertising investment across Japan, South Korea and the U.S. in 2026Q1, fuelling rapid mobile revenue growth. South Korea, Japan and the U.S. recorded QoQ revenue growth of 870%, 214% and 155%, respectively, contributing 30%, 25% and 12% of quarterly IAP revenue.

Genspark Uses Market-Specific Media Strategies to Reach Professional Audiences at Scale

Source: Sensor Tower Pathmatics Digital Advertising Insights



Genspark's media strategy is highly localised to user behaviour in each market. In Japan, nearly 80% of impressions were concentrated on YouTube, targeting professional users through video content. In South Korea, spend was focused on the Facebook and Instagram ecosystem, which accounted for over 80% of impressions. In the U.S., Genspark allocated 91% of impressions to linear TV, prioritising broad reach and brand awareness. Across markets, creative messaging consistently highlighted workplace productivity and AI-powered presentation workflows, closely aligning with its target audience.



Case Study: Plaud

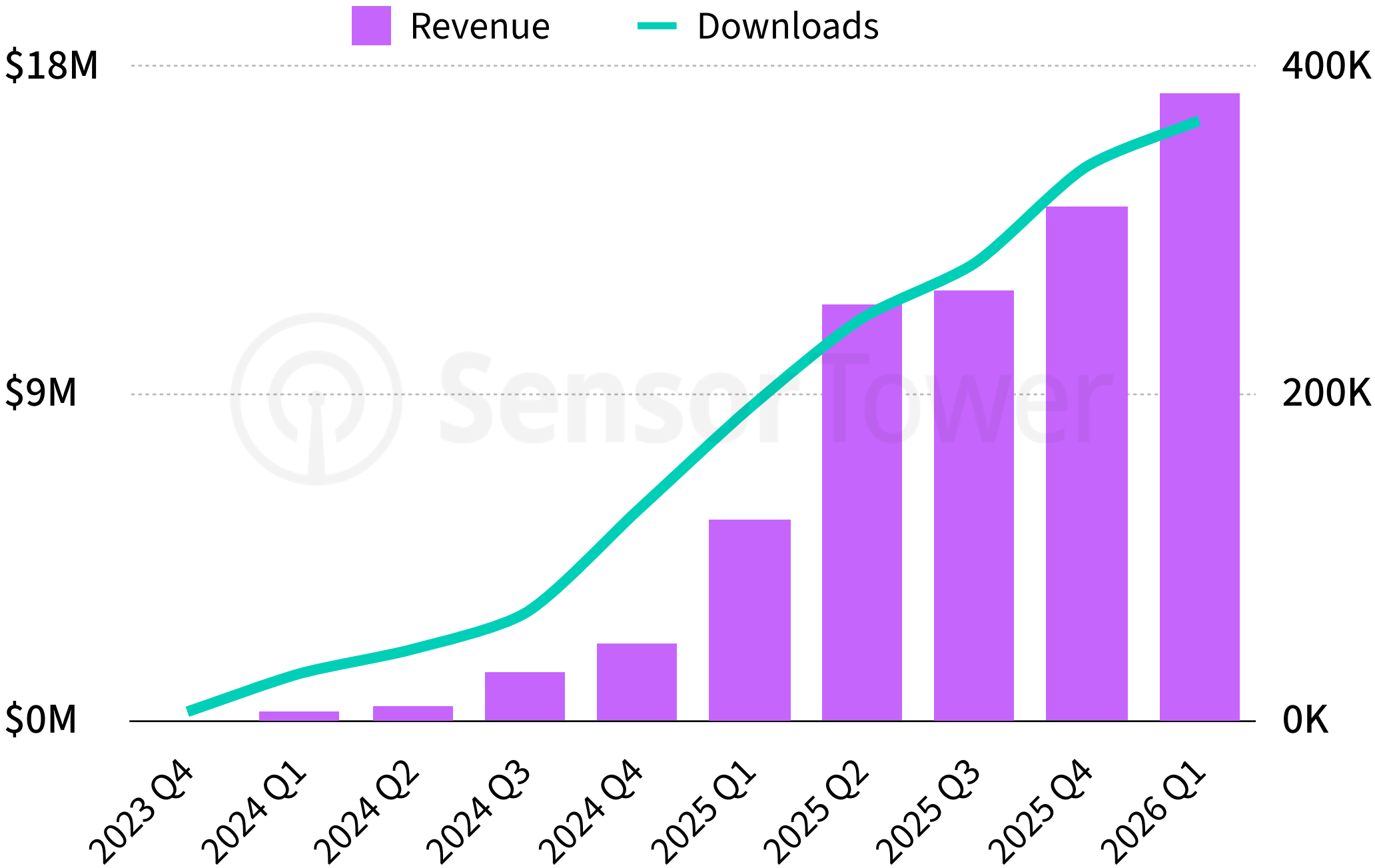


Plaud Targets Premium Productivity Workflows, Emerging as a Top-Grossing AI App

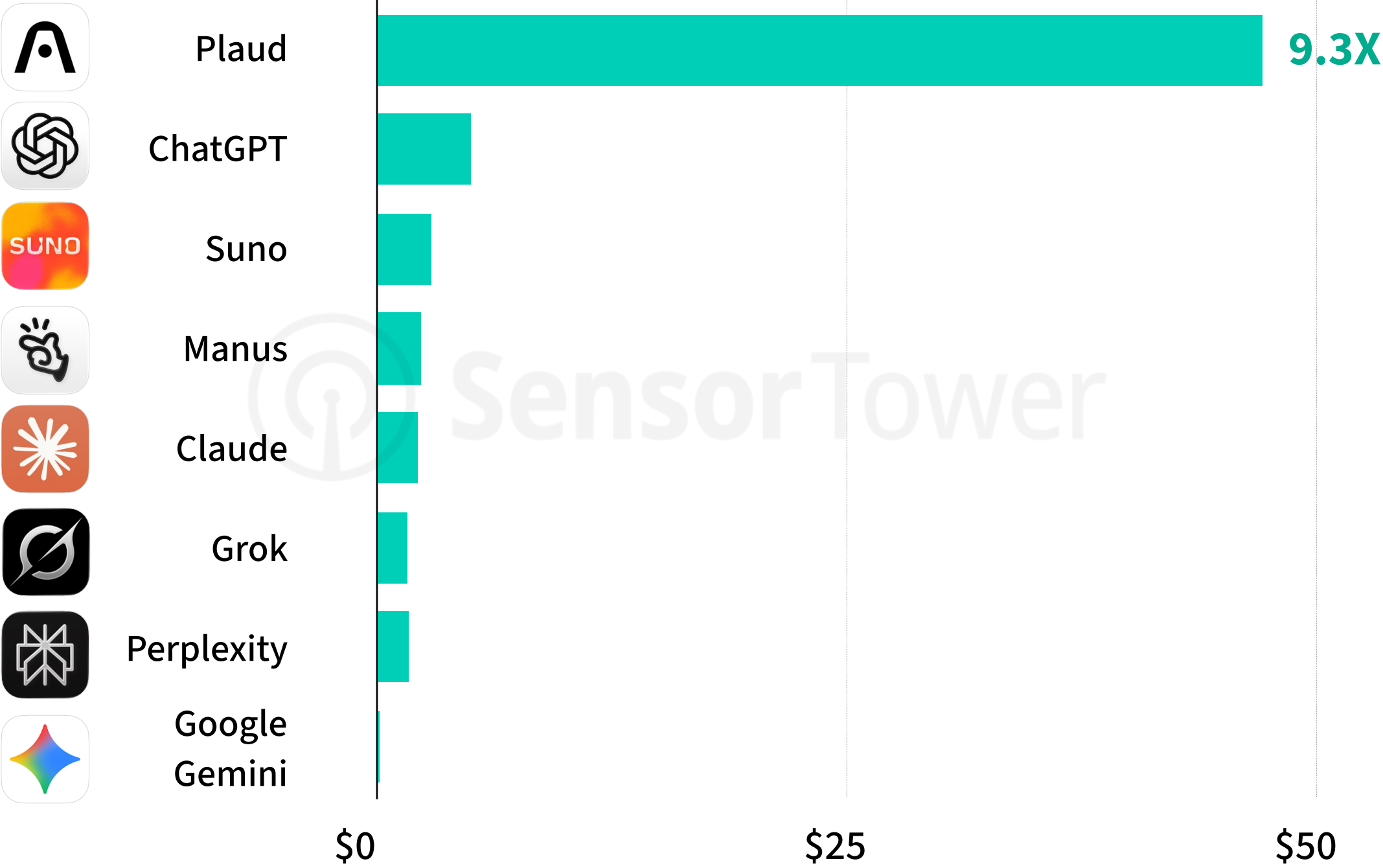
Source: Sensor Tower App Performance Insights

Plaud: AI Note Taker, developed by Plaud Inc., combines dedicated hardware with AI-powered transcription and summarisation to serve meetings, interviews, lectures and content capture workflows. By focusing on high-value productivity use cases and professional users, Plaud achieved an average revenue per download of \$47, approximately 9.3x higher than ChatGPT mobile. From 2025 Q2 – 2026 Q1, revenue grew 475% QoQ, with cumulative mobile IAP revenue surpassing \$65M by March 2026.

Plaud Mobile App Downloads and IAP Revenue Trend



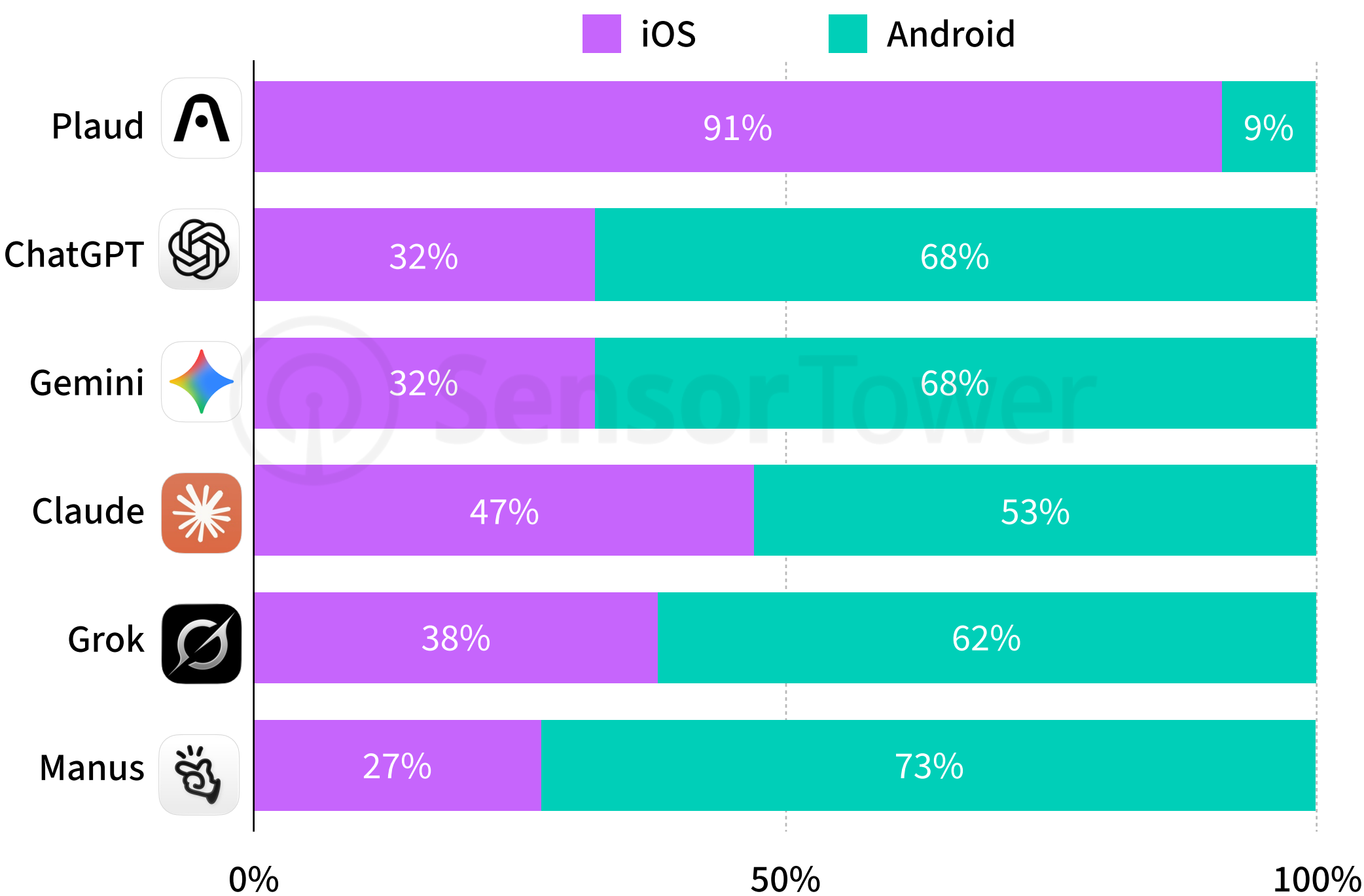
Average Revenue per Download Among Leading Generative AI Apps (2026 Q1)



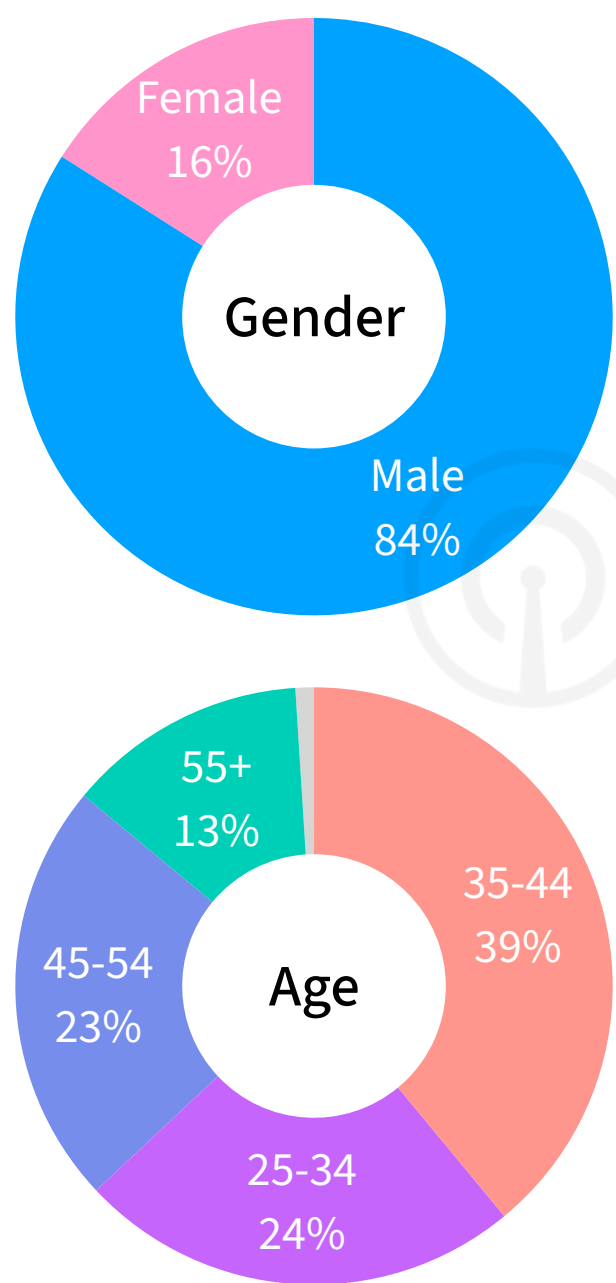
Plaud Addresses Unmet Recording and Transcription Needs Among iOS Users, Resonating with Professionals and Knowledge Workers

Source: Sensor Tower App Performance Insights & Audience Insights

Download Distribution of Leading AI Apps by Device



Plaud User Profile in Japan (Nov 2025–Mar 2026)



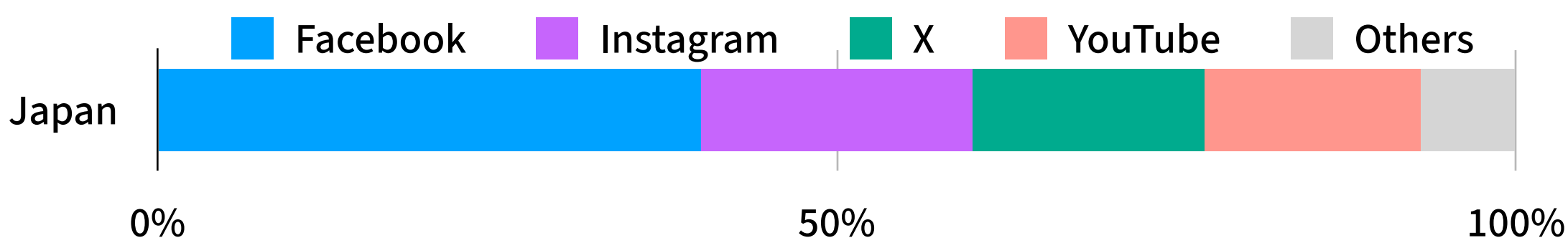
App Category	Audience Affinity vs. General Population Time Spent per User
Healthcare	4.17x
Books	3.75x
Business	3.71x
Health & Fitness	3.44x
Productivity	2.47x

Plaud's hardware-integrated experience is highly optimised for iOS users, with 91% of downloads coming from iOS devices – significantly higher than leading AI assistants such as ChatGPT, Gemini and Claude. Its AI note-taking and transcription workflows strongly resonate with professionals and knowledge workers. In Japan, Plaud's audience is primarily male professionals aged 35–55, with particularly strong affinity toward business, healthcare and productivity-related applications.

Plaud Localises Its Advertising Strategy Through Influencer Partnerships, Industry Use Cases, and CES Exposure

Source: Sensor Tower Pathmatics Digital Advertising Insights

Plaud Advertising Strategy in Japan



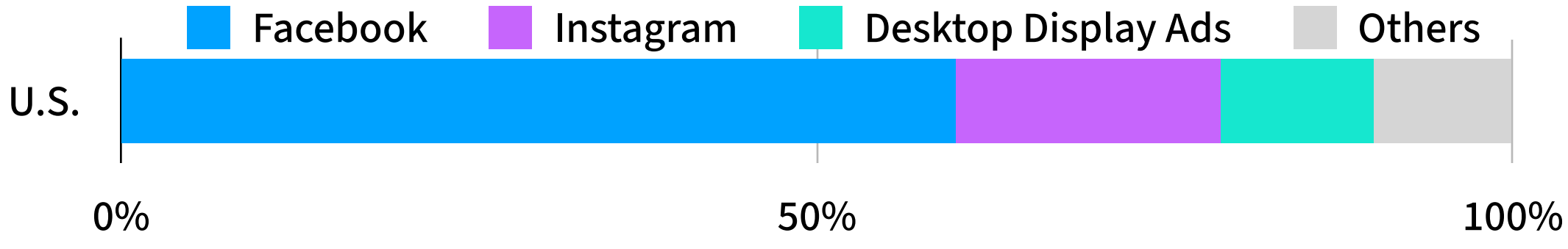
Features Japanese football star Yuto Nagatomo as brand ambassador



Highlights professional use cases across healthcare, architecture and other industries

Landing Page: <https://jp.plaud.ai/>

Plaud Advertising Strategy in the United States



Plaud Note Pro won over CES
The world's No. 1 AI note-taking brand

CES Exhibition Campaign



Highlights positioning as “The World's Most Advanced AI Note Taker”

Landing Page: <https://www.plaud.ai>

Plaud adopts highly localised marketing strategies across markets. In Japan, it focuses on Facebook and Instagram, combining celebrity endorsements with professional use cases to build awareness and credibility. Featuring football star Yuto Nagatomo and showcasing applications in healthcare and architecture helps Plaud connect with its target audience. In the U.S., Plaud leverages CES exposure and product-led messaging to position Plaud Note Pro as “The World’s Most Advanced AI Note Taker” and reinforce its leadership in the AI note-taking category.

Case Study: Zeta

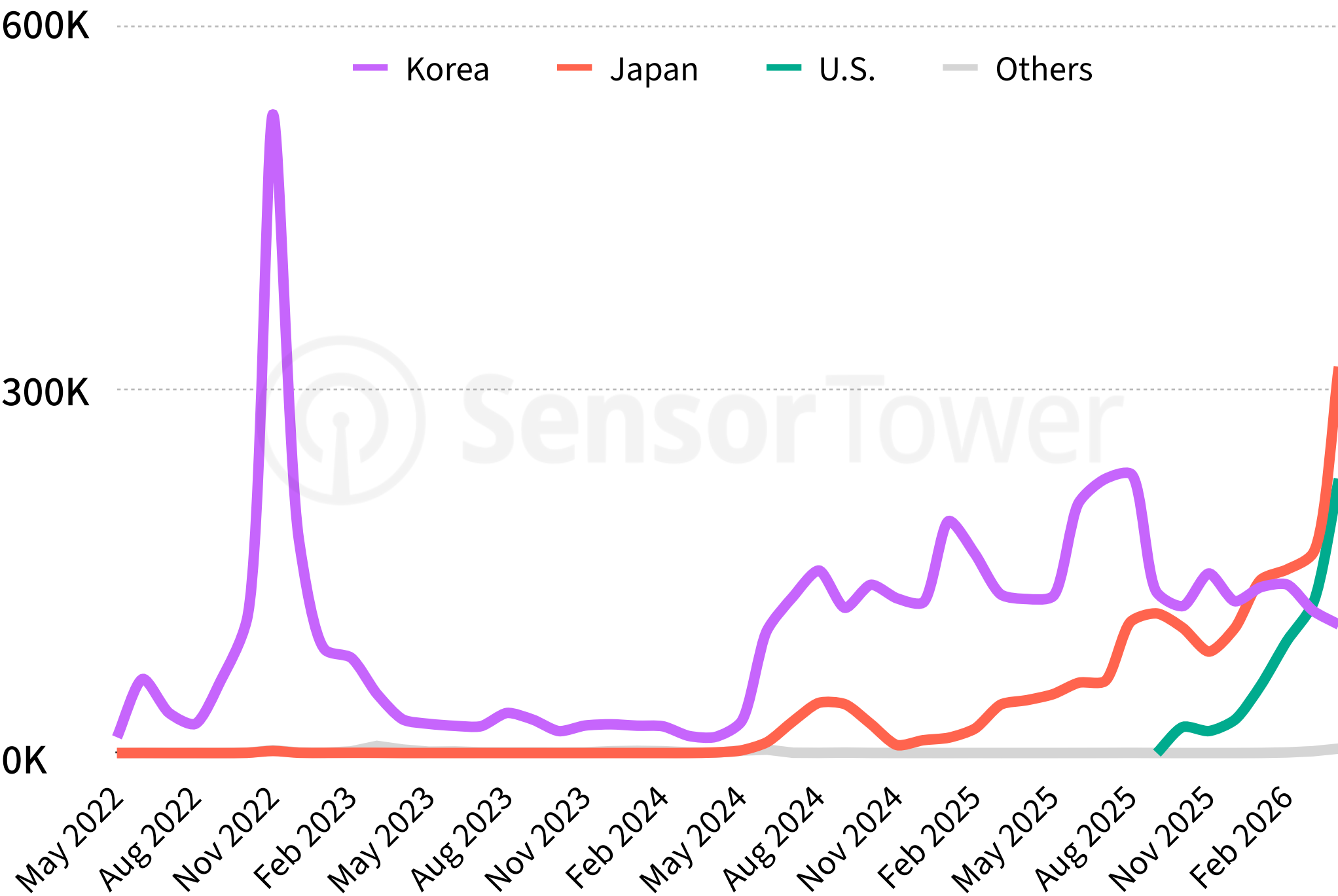


Zeta Validates Its Business Model in Korea Before Successfully Replicating It in Japan

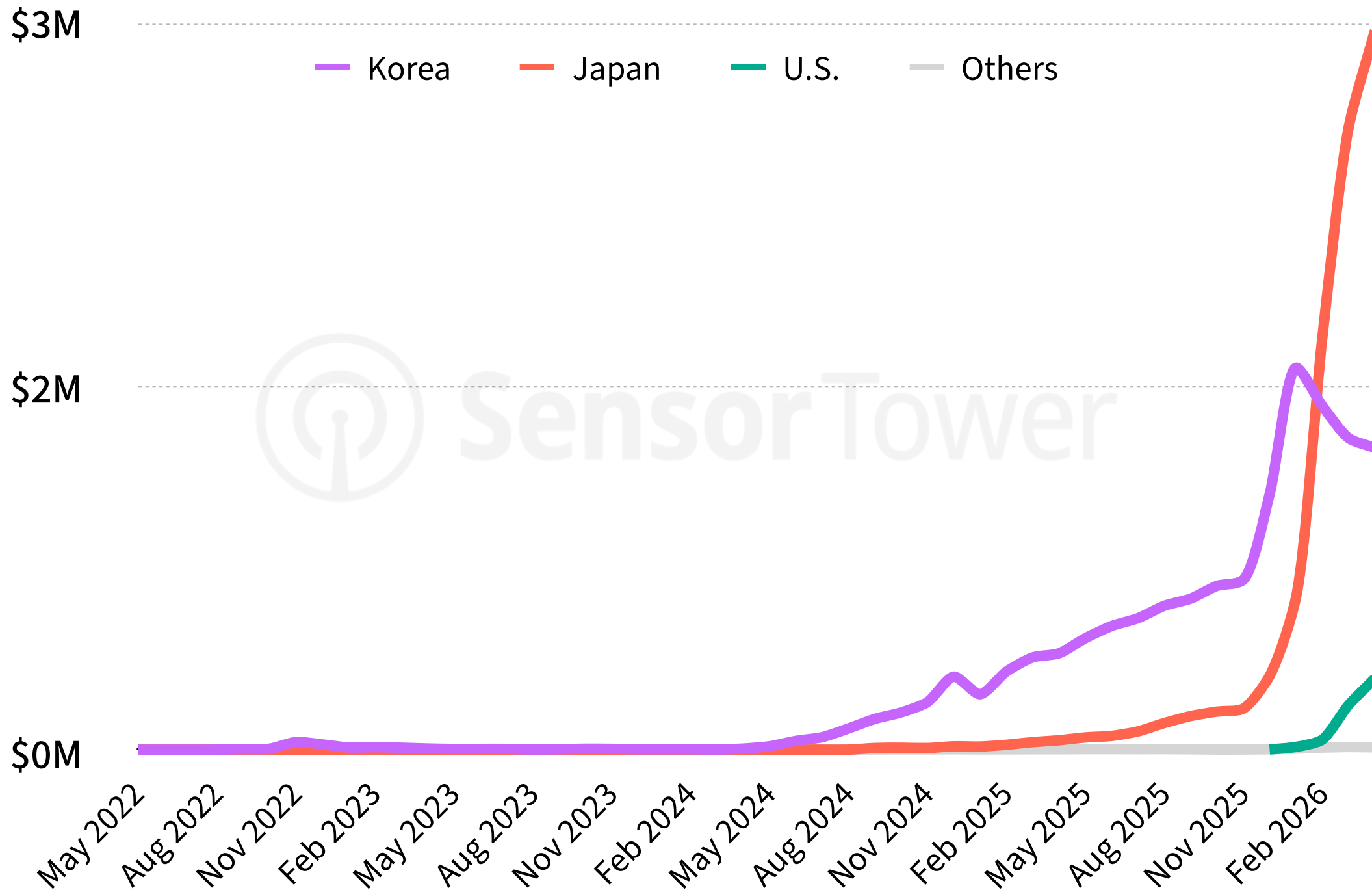
Source: Sensor Tower App Performance Insights

Zeta, developed by South Korean AI company ScatterLab, is an AI companion and interactive storytelling app built around immersive novel experiences. After validating its AI companion model in Korea, Zeta successfully expanded into Japan and is now leveraging rapid growth in the U.S. to build a global brand. In Q1 2026, downloads and revenue in Japan surged 62% and 691% respectively, with revenue approaching US\$5 million. Zeta ranked #1 in both AI companion app downloads and revenue in Japan, while generating more than US\$10 in revenue per download – significantly ahead of competitors.

Zeta Mobile App Monthly Download Trend — By Market



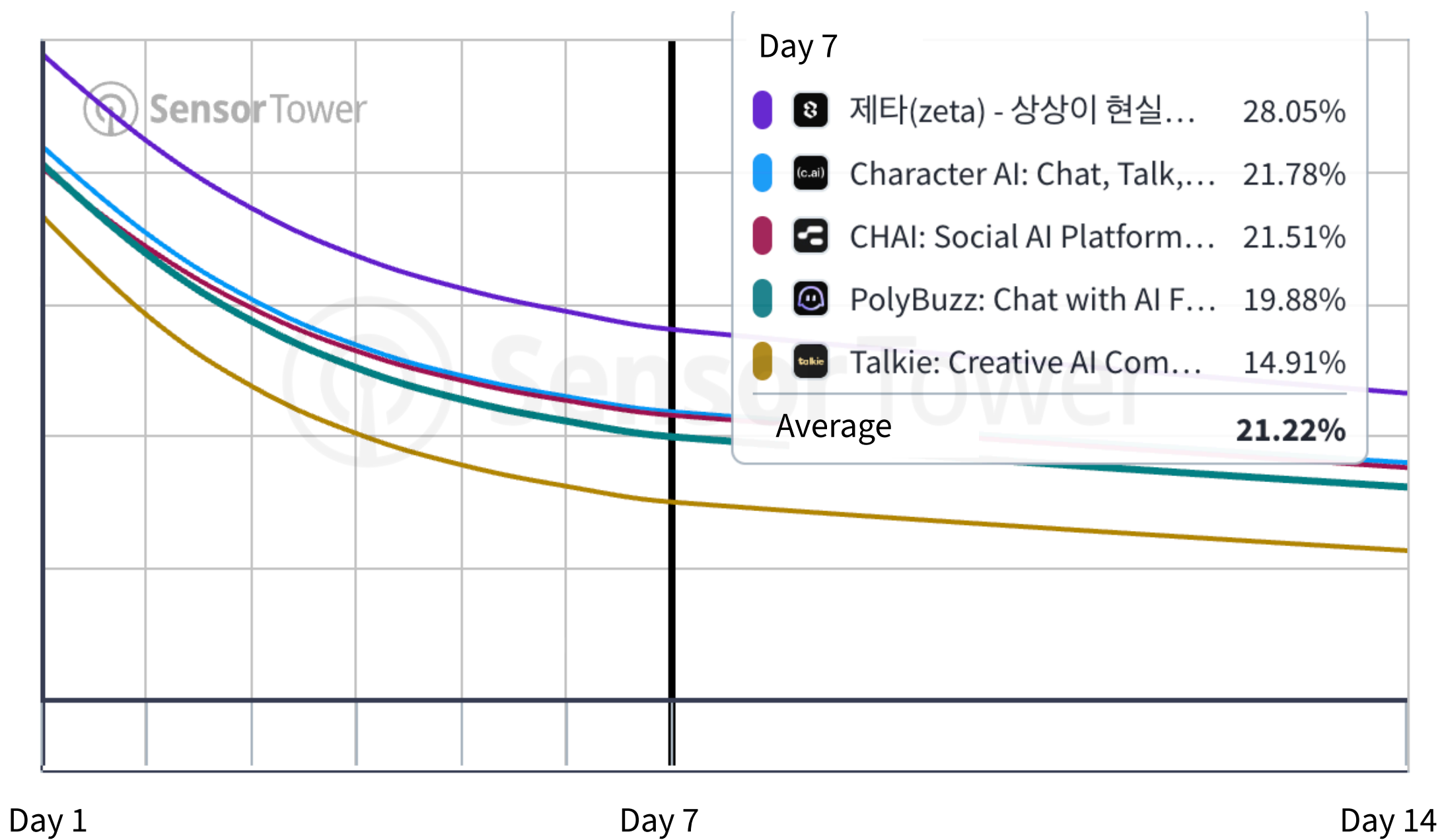
Zeta Mobile App Monthly In-App Revenue Trend — By Market



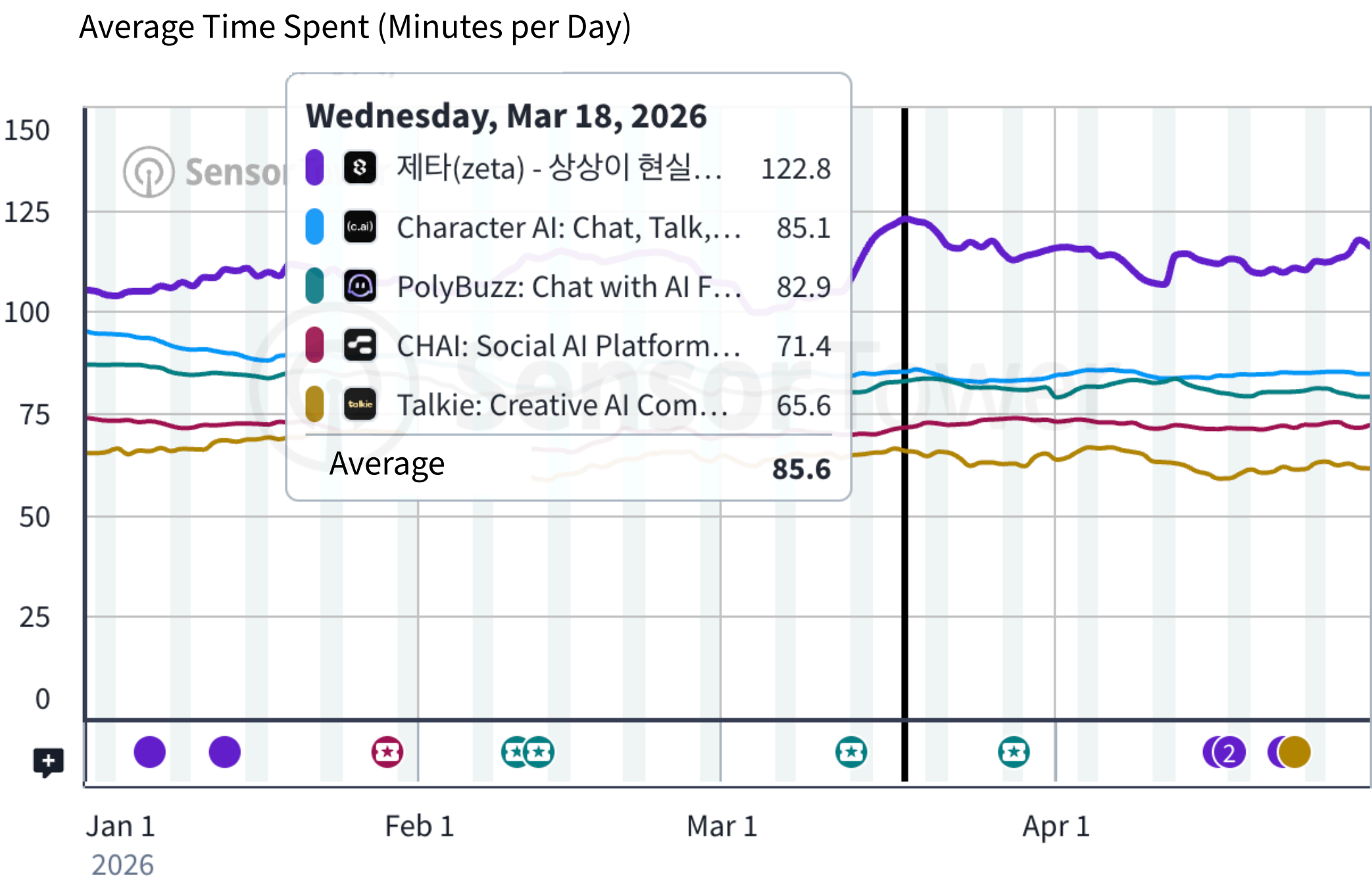
Zeta Drives Superior Engagement Through Interactive Storytelling and Immersive Narrative Experiences

Source: Sensor Tower App Performance Insights

March 2026 Retention Rate Trend: Zeta vs. Competing Mobile Apps



Average Daily Time Spent Trend: Zeta vs. Competing Mobile Apps (Jan–Apr 2026)

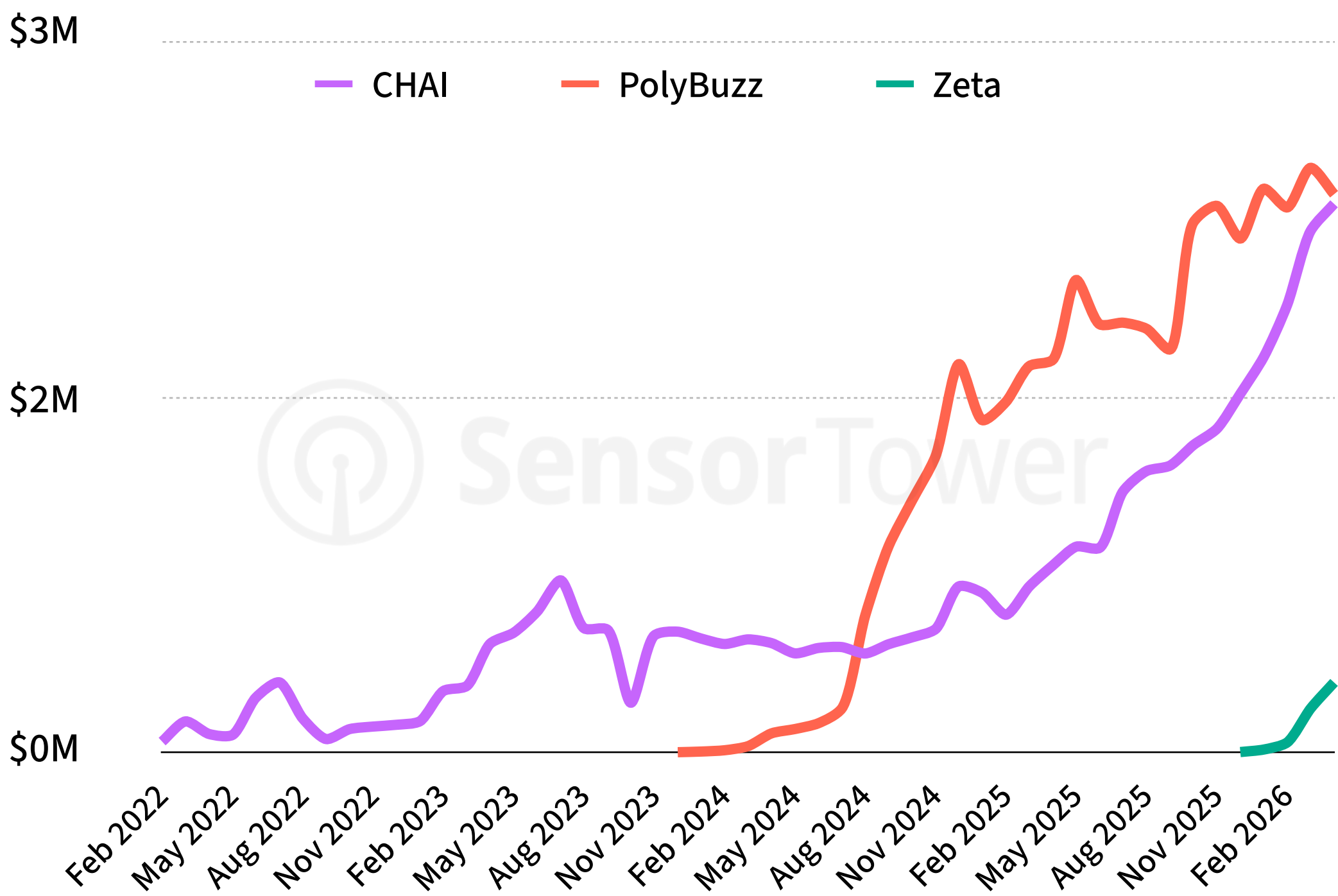


Unlike competitors such as Character AI and PolyBuzz, which focus primarily on lightweight AI companion conversations, Zeta differentiates itself through interactive storytelling that encourages users to actively participate in narrative development. This creates stronger immersion and long-term engagement. Across both 7-day retention and daily time spent, Zeta significantly outperforms category averages and key competitors, demonstrating its ability not only to acquire users but also to retain them more effectively.

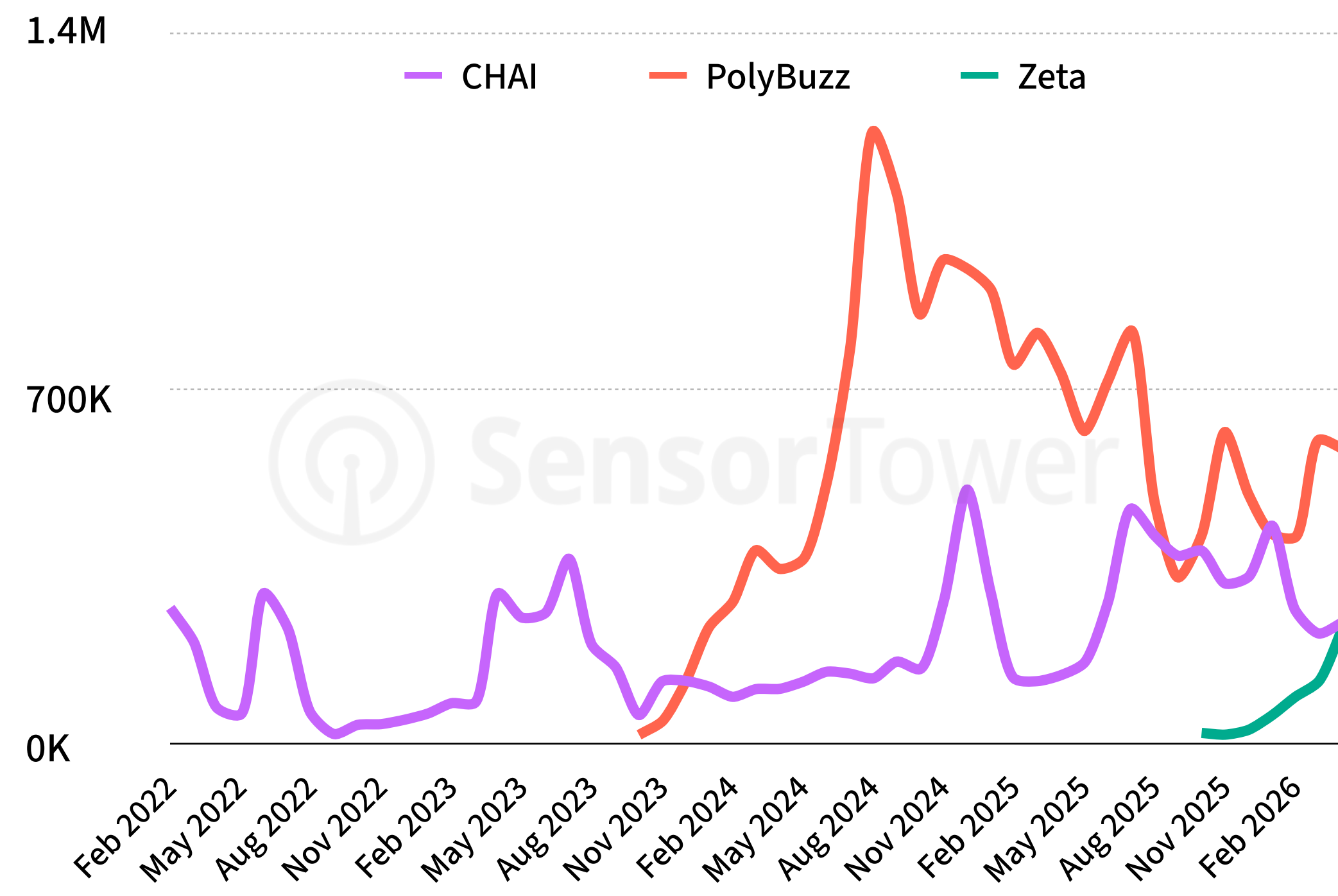
Zeta Gains Momentum in the U.S. Market as PolyBuzz and CHAI Continue to Lead

Source: Sensor Tower App Performance Insights

Monthly Mobile App Revenue Trend in the U.S.: Zeta vs. PolyBuzz vs. CHAI



Monthly Mobile App Download Trend in the U.S.: Zeta vs. PolyBuzz vs. CHAI

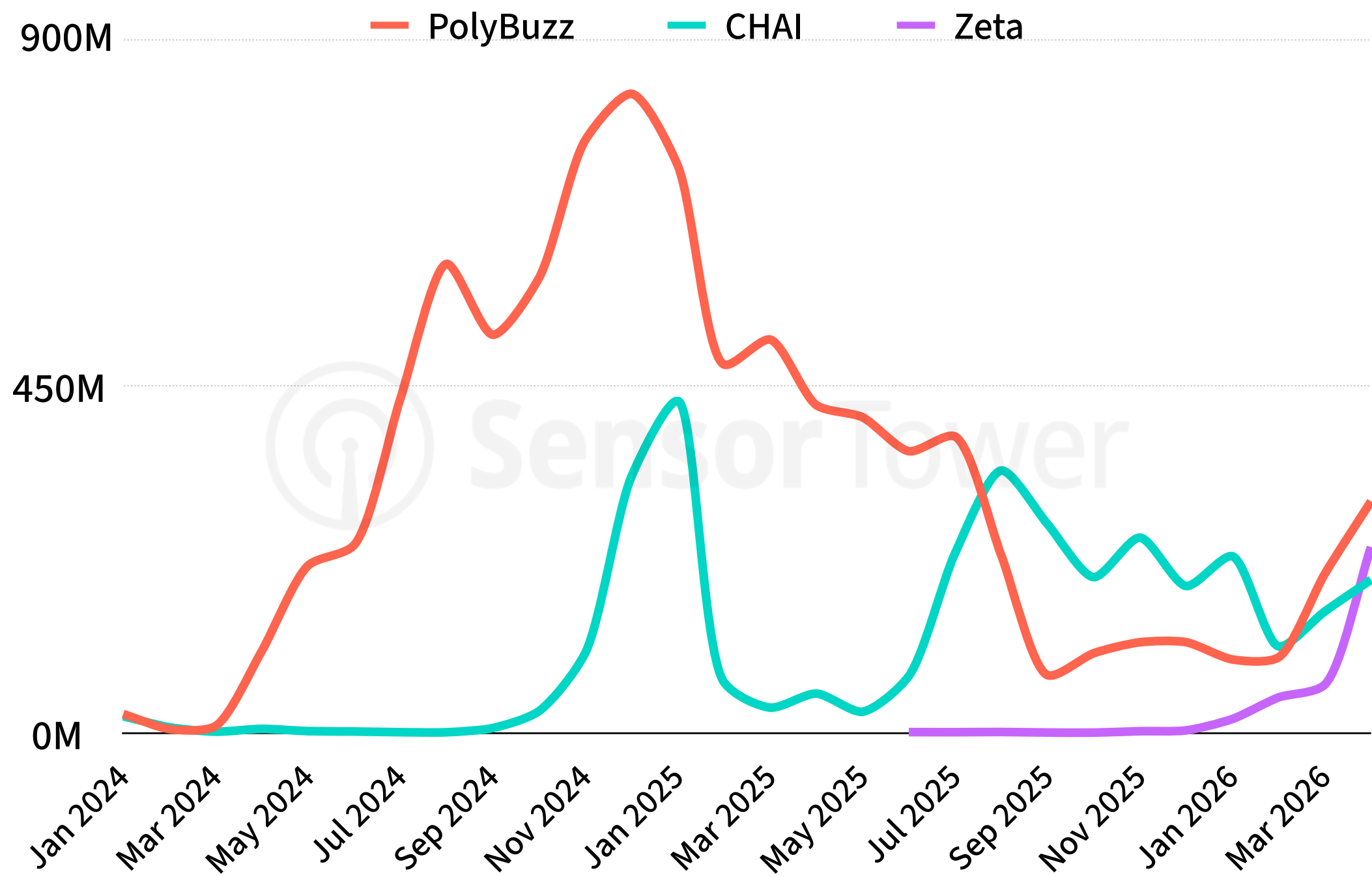


Since late 2025, Zeta has entered a breakout growth phase in the U.S. market, with both revenue and downloads trending sharply upward. Its growth rate significantly outpaces that of PolyBuzz and CHAI. As of April 2026, Zeta's downloads have nearly caught up with CHAI. While a revenue gap remains, its growth trajectory is strong, positioning Zeta as one of the most promising challengers in the AI companion category.

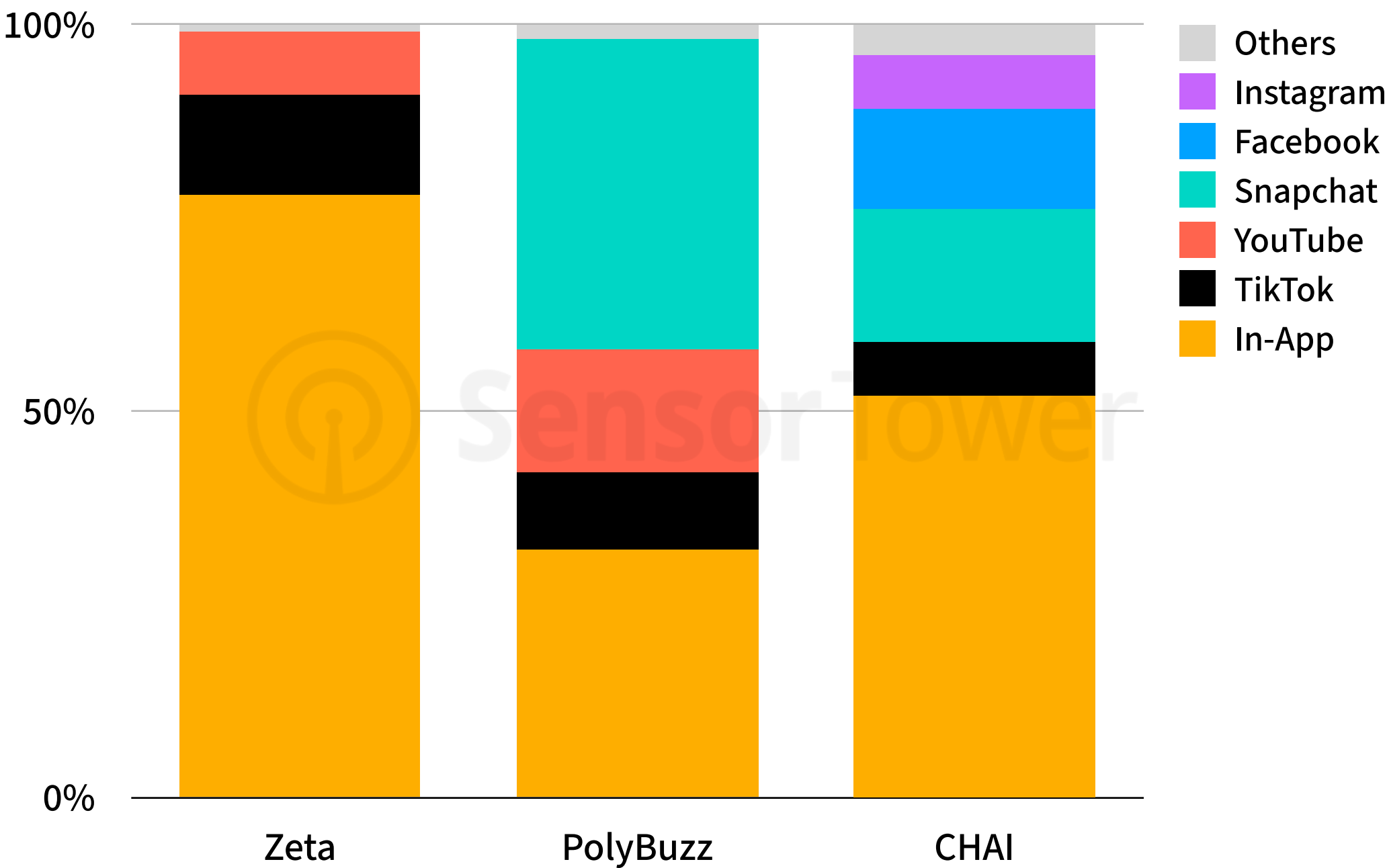
Zeta Rapidly Scaled U.S. Advertising Investment in 2026 Q1 to Accelerate Brand Awareness

Source: Sensor Tower Pathmatics Digital Advertising Insights

Monthly Digital Ad Impression Trend in the U.S.: Zeta vs. PolyBuzz vs. CHAI



Digital Ad Impression Share in the U.S.: Zeta vs. PolyBuzz vs. CHAI



PolyBuzz was the first mover in the U.S. market, steadily increasing ad investment from March 2024 and reaching peak exposure by late 2025. CHAI followed roughly 6 months later, concentrating spend in January and September 2025 to capture a second wave of users. Zeta entered later but launched an aggressive push in Q1 2026 to rapidly build awareness. Its channel strategy is heavily concentrated on in-app advertising, supported by limited social media placements, contrasting with PolyBuzz’s Snapchat-led, multi-platform approach and CHAI’s more balanced cross-channel mix.



Case Study: PixAI

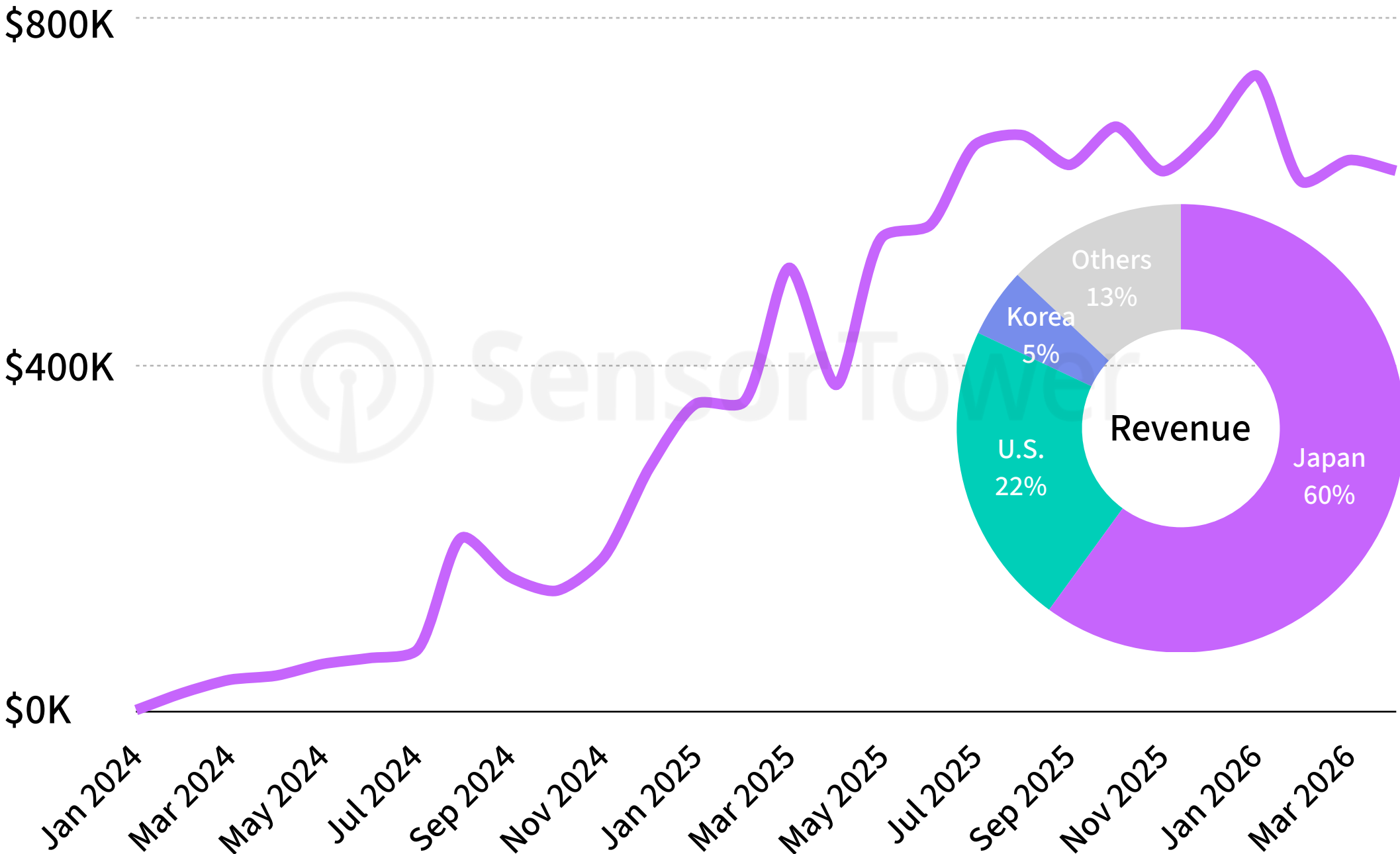


PixAI Mobile Revenue Surged 434% in 2025, Becoming Japan’s Highest-Grossing AI Content Generation App

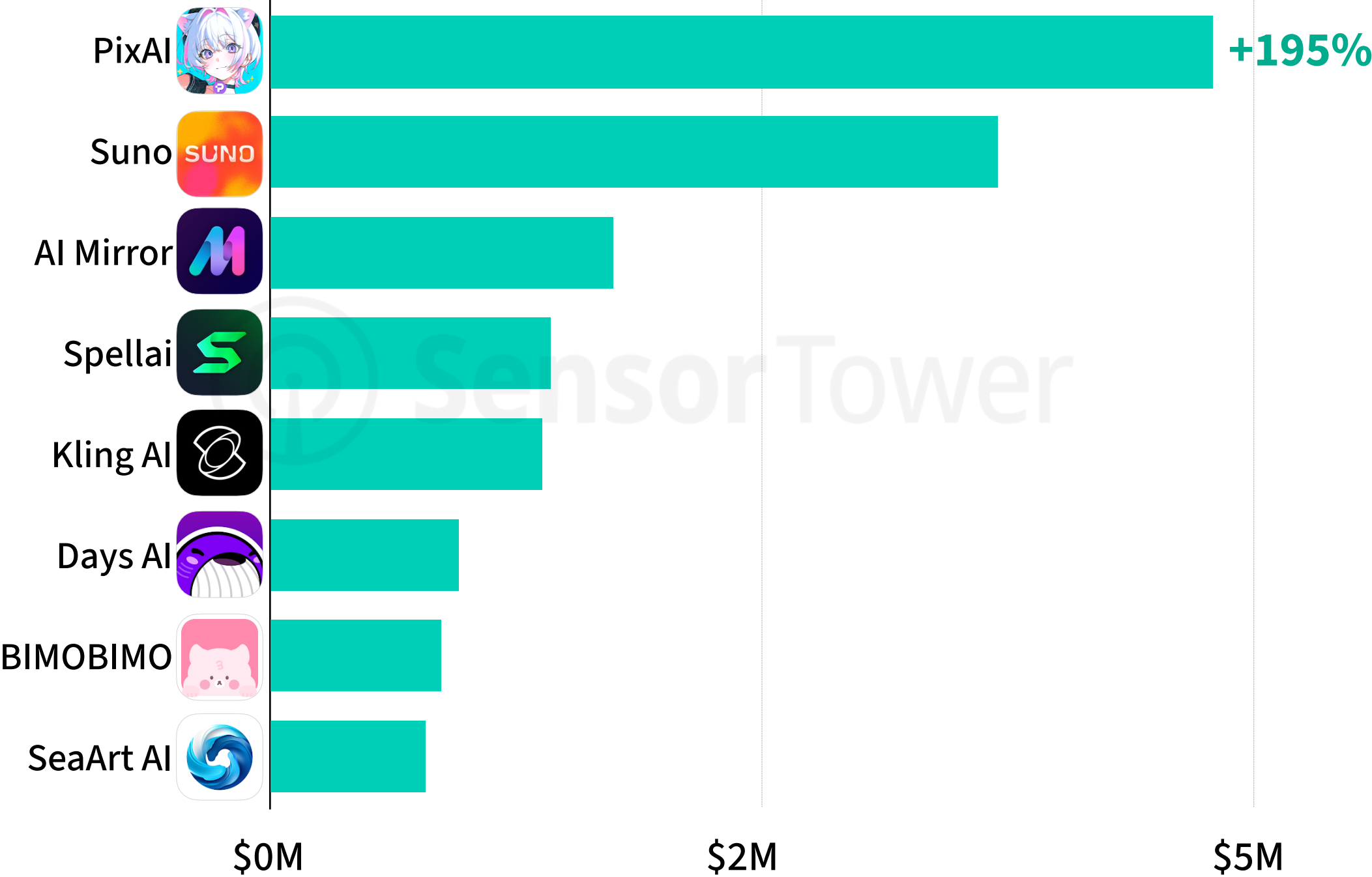
Source: Sensor Tower App Performance Insights

PixAI, developed by Metanomaly, is a leading anime-focused AI art creation platform spanning both the pixai.art website and mobile app. Combining high-quality image generation, LoRA customization, and a deep focus on anime creators, the platform has built a strong global following. According to Sensor Tower, PixAI’s mobile revenue surged 434% YoY in 2025. As of April 2026, cumulative mobile revenue has exceeded \$10 million, with 60% of revenue coming from Japan, making PixAI the highest-grossing AI content generation app in Japan over the past year.

PixAI Mobile App Global In-App Purchase Revenue Trend



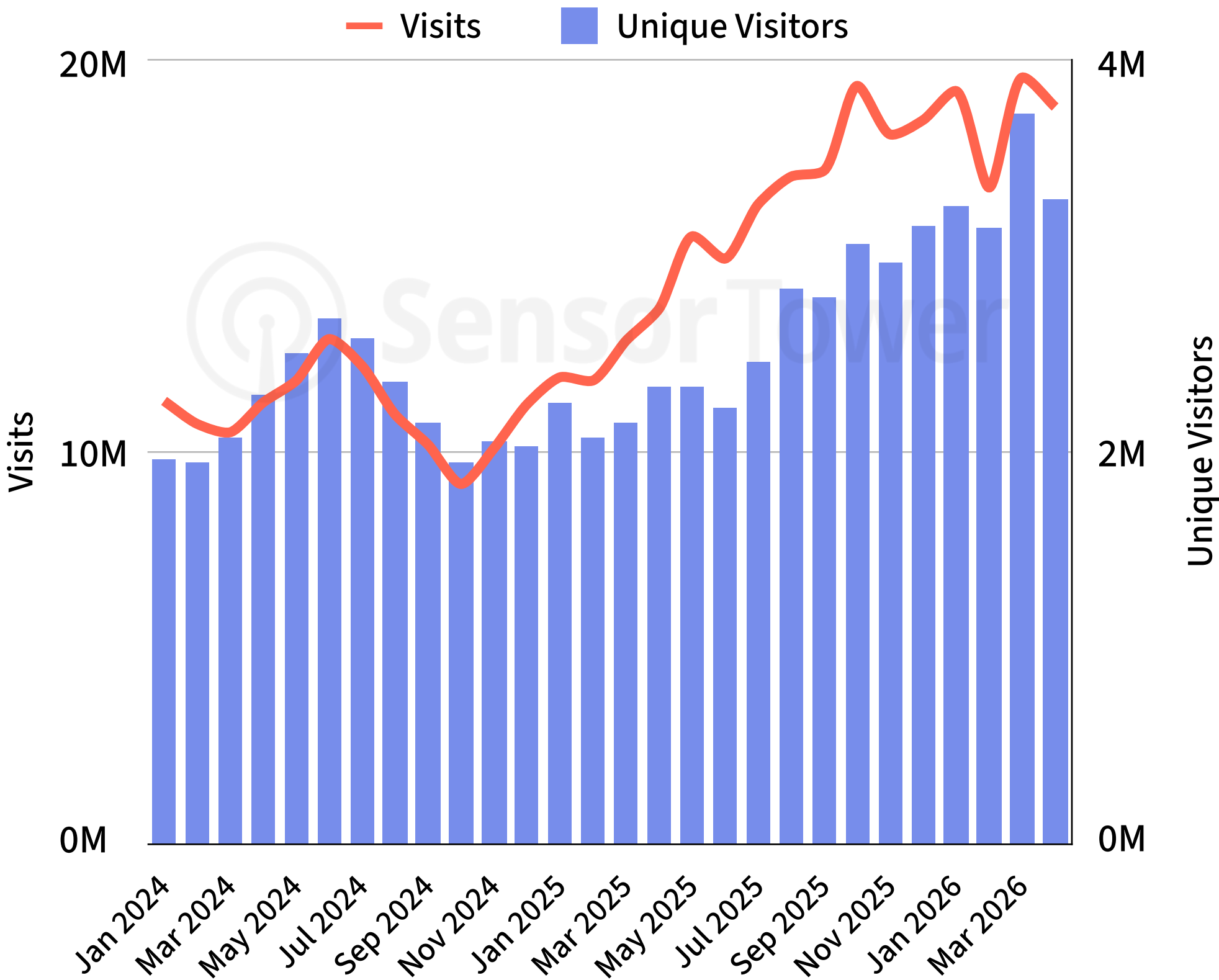
Top AI Content Generation Apps by Mobile Revenue in Japan (May 2025 – Apr 2026)



PixAI Website Reaches Nearly 20 Million Monthly Visits Globally, Becoming Japan’s Most Visited AI Content Generation Platform

Source: Sensor Tower Web Insights

PixAI Website Traffic and Unique Visitors Trend
Jan 2024 – Apr 2026



Top 10 AI Platform Websites in Japan by Traffic
Q1 2026

Rank	Icon	Product	Website	Category
1		ChatGPT	chatgpt.com	AI Assistant
2		Google Gemini	gemini.google.com	AI Assistant
3		Claude	claude.ai	AI Assistant
4		Grok	grok.com	AI Assistant
5		Perplexity AI	perplexity.ai	AI Assistant
6		Google AI Studio	aistudio.google.com	AI Assistant
7		OpenAI	openai.com	AI Assistant
8		DeepSeek	deepseek.com	AI Assistant
9		PixAI	pixai.art	AI Content Generation
10		豆包	doubao.com	AI Assistant

Global AI App Rankings



China iOS Market: ByteDance Places 5 AI Apps in the Top 10 Rankings

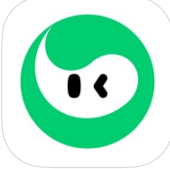
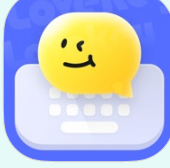
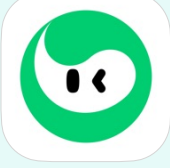
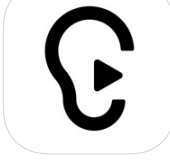
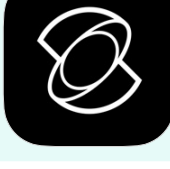
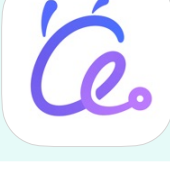
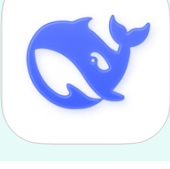
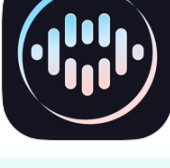
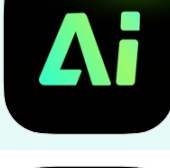
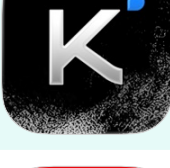
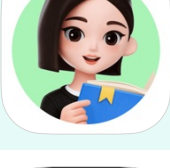
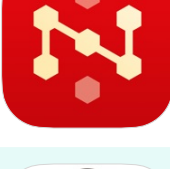
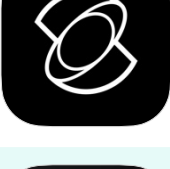
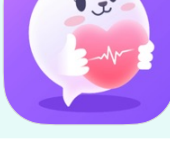
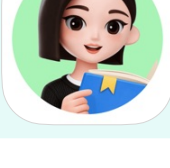
ByteDance is emerging as the dominant AI ecosystem player in China’s iOS market, with 5 apps spanning AI assistants, AI companions, education and content generation ranking among the Top 10.

Doubao leads both the Active Users and Downloads rankings, reinforcing its position as a mass-market AI assistant. Meanwhile, AI companion app Maoxiang tops the Revenue Ranking with cumulative revenue exceeding \$22 million, while AI content generation products Jimeng AI and Xiao Yunque rank among the market's top-grossing AI creative apps.

Beyond ByteDance, competition remains intense. Kimi surged to #7 in the Revenue Ranking after the launch of its K2.5 model, with revenue increasing 13x QoQ. At the same time, niche AI productivity apps such as Lovekey and Miaoyu Keyboard demonstrate that targeted workflows and strong monetisation can still carve out meaningful positions alongside China's largest AI platforms.

Source: Sensor Tower App Performance Insights & Web Insights

Top 10 Generative AI Apps in China iOS Market (Q1 2026)

	Revenue	Active Users	Downloads
1	 猫箱 ByteDance	 豆包 ByteDance	 豆包 ByteDance
2	 即梦AI ByteDance	 DeepSeek DeepSeek	 千问 Alibaba Group
3	 AI Mate KL Mobile	 元宝 腾讯	 蚂蚁阿福 Ant Group
4	 Lovekey FD Tech	 即梦AI ByteDance	 元宝 腾讯
5	 讯飞听见 iFLYTEK	 千问 Alibaba Group	 即梦AI ByteDance
6	 Kling AI Beijing Kwai Technology	 蚂蚁阿福 Ant Group	 DeepSeek DeepSeek
7	 Kimi Moonshot AI	 文心 百度	 小云雀 ByteDance
8	 视频特效大师 婉茹 吴	 Kimi Moonshot AI	 豆包爱学 ByteDance
9	 小云雀 ByteDance	 纳米AI Qihoo 360	 Kling AI Beijing Kwai Technology
10	 妙语键盘 北京欣睿科技	 豆包爱学 ByteDance	 灵光 Ant Group

Japan Market: Zeta Climbs to #3 in the Revenue Rankings

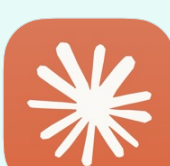
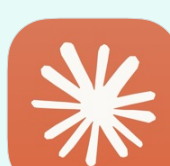
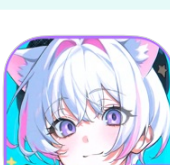
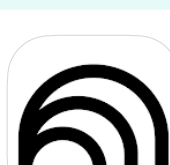
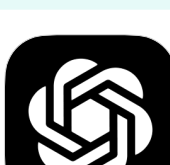
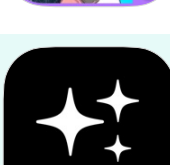
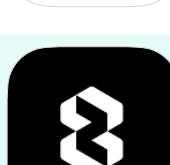
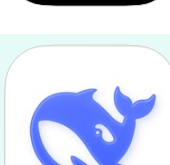
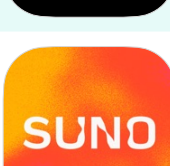
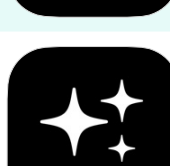
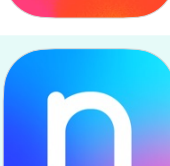
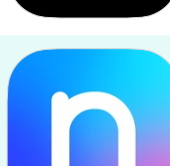
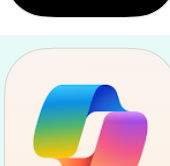
In Q1 2026, Zeta's revenue in Japan surged 691%, propelling it to #3 in the Generative AI Revenue Rankings, behind only ChatGPT and Grok. Its rapid rise highlights strong demand for AI companion applications in the Japanese market.

AI productivity tools also performed strongly. AI note-taking apps Plaud and Notta ranked #5 and #10 in the Revenue Rankings, while AI agent workspace Genspark ranked #8 in Revenue and #9 in Monthly Active Users.

Meanwhile, anime-focused AI creation platform PixAI continued to benefit from strong product-market fit with Japan's creator ecosystem, ranking #7 in Revenue and #9 in Website Traffic.

Source: Sensor Tower App Performance Insights & Web Insights

Top 10 Generative AI Apps in Japan Market (Q1 2026)

	Revenue		Active Users		Web Traffic	
1		ChatGPT OpenAI		ChatGPT OpenAI		ChatGPT chatgpt.com
2		Grok X Corp.		Google Gemini Google		Google Gemini gemini.google.com
3		zeta Scatter Lab		Grok X Corp.		Claude claude.ai
4		Google Gemini Google		Microsoft Copilot Microsoft		Grok grok.com
5		Plaud PLAUD		Perplexity PerplexityAI		Google AI Studio aistudio.google.com
6		Claude by Anthropic Anthropic		Claude by Anthropic Anthropic		Perplexity perplexity.ai
7		PixAI METANOMALY		Google NotebookLM Google		OpenAI openai.com
8		Genspark Genspark		zeta Scatter Lab		DeepSeek deepseek.com
9		Suno Suno		Genspark Genspark		PixAI pixai.art
10		Notta MindCruiser		Notta MindCruiser		Microsoft Copilot copilot.microsoft.com

Korea Market: Local AI Companion Apps Break Into the Top Ranks

In Q1 2026, ChatGPT remained the clear market leader in Korea's Generative AI landscape.

Several local AI companion apps, including Zeta, Melting, Wrtn, and BabeChat, secured positions across the Top 10 rankings, demonstrating the strong commercial potential of Korea's homegrown AI companion ecosystem.

The market reflects a competitive dynamic where global AI leaders dominate overall scale, while local products differentiate through AI companionship and specialised use cases. As a result, Korea has emerged as one of the most diverse Generative AI markets, with monetisation and user engagement spread across both global platforms and local innovators.

Source: Sensor Tower App Performance Insights & Web Insights

Top 10 Generative AI Apps in Korea Market (Q1 2026)

	Revenue	Active Users	Web Traffic
1	 ChatGPT OpenAI	 ChatGPT OpenAI	 ChatGPT chatgpt.com
2	 zeta Scatter Lab	 Google Gemini Google	 Google Gemini gemini.google.com
3	 Claude by Anthropic Anthropic	 Adot SK Telecom	 Claude claude.ai
4	 Google Gemini Google	 Perplexity PerplexityAI	 Perplexity perplexity.ai
5	 Grok X Corp.	 zeta Scatter Lab	 Grok grok.com
6	 Melting Watnee	 Grok X Corp.	 Google AI Studio aistudio.google.com
7	 Genspark Genspark	 Wrtn wrtn	 OpenAI openai.com
8	 Gemmy AI Jetkite	 Claude by Anthropic Anthropic	 BabeChat babechat.ai
9	 可灵AI Beijing Kwai Technology	 AI Mirror Polyverse	 Wrtn wrtn.ai
10	 Perplexity perplexity.ai	 Gemmy AI Jetkite	 zeta zeta-ai.io

Key Takeaways

1

Gen AI App Revenue Has Exploded Into a New Growth Engine

From 2025 Q2 to 2026 Q1, global Generative AI app revenue surged 232% YoY, reaching US\$6.1 billion. Over the past three years, the category has expanded more than 32x, making AI the fastest-growing segment in the non-gaming app economy by both scale and growth rate.

2

The U.S. Leads, While Asia Emerges as the Next Growth Frontier

The U.S. remains the largest AI app market, generating nearly US\$2.2 billion in revenue and contributing almost 38% of global AI app revenue. At the same time, Japan, Korea, and other Asian markets are rapidly scaling, becoming key growth engines for AI products expanding internationally.

3

ChatGPT Dominates Revenue, But Competition Is Intensifying

ChatGPT remains the clear revenue leader, generating nearly US\$1.4 billion in mobile revenue per quarter and surpassing 1 billion monthly active users across web and mobile. However, the rise of Gemini and Claude is reshaping the competitive landscape, with both platforms steadily gaining web traffic share and narrowing ChatGPT's lead in user attention.

Sensor Tower

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