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Brazil Mobile App Growth Trends 2026

From market intelligence to smarter scaling for app marketers.



MEGA DIGITAL BigSpy Appark



Brazil Mobile App Growth Trends 2026

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Source: Appark.ai, Mega Digital, BigSpy

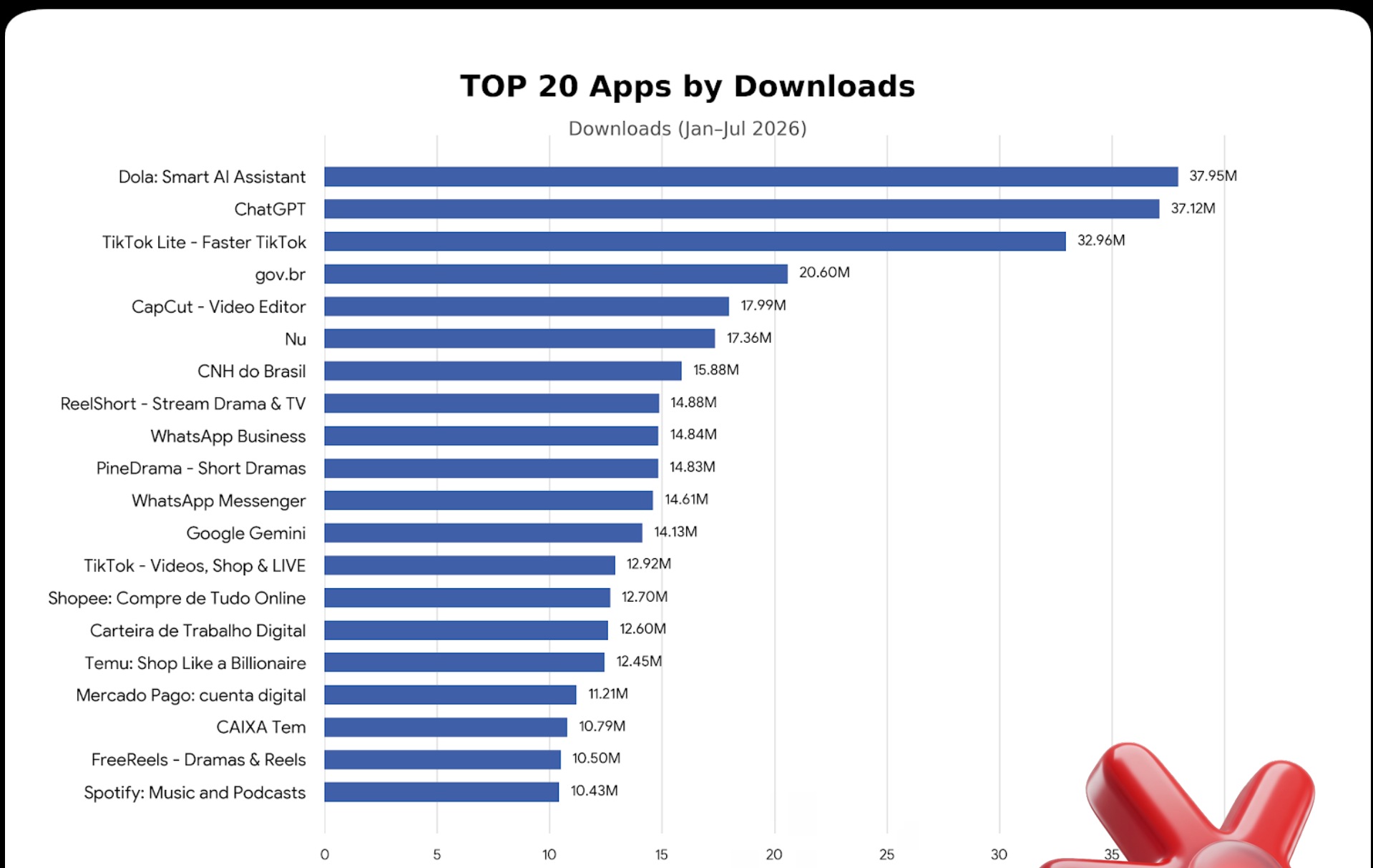
CHAPTER 1

1.1 Brazil's Position in the Global App Economy

As the largest and fastest-growing app market in Latin America, Brazil is an emerging growth pole that cannot be overlooked in the global app economy. This chapter breaks down the TOP20 rankings on both App Store and Google Play across the two core dimensions of downloads and revenue, and benchmarks Brazil's share within Latin America and the global market to clearly anchor its industry standing and growth potential, establishing a holistic perspective for the in-depth vertical analysis that follows.



Emerging verticals on the rise, local foundation remains solid



Source: *Appark.ai*

Brazil market: Top 20 apps by downloads, January–July 2026 (Android & iOS)

Analysis based on the revenue TOP20:

AI Tools Take the Top Traffic Spot as the Market's Core Growth Engine

AI apps claimed the top two positions, with both Dola and ChatGPT surpassing 37 million downloads — far ahead of other categories in magnitude. Generative AI tools have entered an explosive growth phase in Brazil and are now the strongest growth driver among non-gaming verticals.

Short-Form Drama Scales in Volume as a New Content Format Penetrates Fast

Three micro-drama apps (ReelShort, PineDrama, FreeReels) entered the TOP20, each exceeding 10 million downloads. As an emerging form of content consumption, short-form drama has rapidly achieved user coverage in Brazil and has become a new traffic-generating vertical.

Local Public-Service and Government Apps Hold a Solid Base with Strong Essential-Need Attributes

Several local government and public service apps (gov.br, CNH driver's license, Digital Work Card, Caixa Bank) made the list, each surpassing 10 million downloads. This reflects the high penetration of digital government services in Brazil, where locally rooted essential-need apps command a stable and loyal user base.

E-Commerce Sees Diversified Competition as Content and Commerce Converge

Shopee, Temu and Mercado Pago form the e-commerce and payments tier, while both the main TikTok app and its Lite version appear on the list at the same time. As content platforms take on commerce capabilities, Brazil's e-commerce landscape shows a diversified competitive structure spanning cross-border platforms, local payment solutions and content-driven commerce.



App Store Downloads: AI Leads the Top Tier, with Tools and E-Commerce Both Strong



Brazil Market: Top 20 Revenue Rankings, January–July (Android & iOS)



Analysis based on the downloads TOP20:

Subscription-Based Tools Top the Revenue Chart as AI Enters Its Monetization Phase

Google One and ChatGPT took the top two spots, each generating more than US$84 million in revenue. Cloud storage and generative AI — two subscription categories — define the revenue ceiling. AI apps have moved from a traffic explosion into the monetization stage, becoming one of the verticals with the highest commercial value today.

Streaming Becomes the Revenue Foundation as Local and Global Players Compete Head-to-Head



Long-form video platforms took five spots on the list, the largest number of any category. Both leading global streamers and the local player Globoplay ranked within the top ten. Brazil's video subscription market is highly mature, and paid content is the core pillar sustaining non-gaming app revenue.

Short-Form Drama Has Completed Commercial Validation, with Monetization Upside Still to Be Unlocked

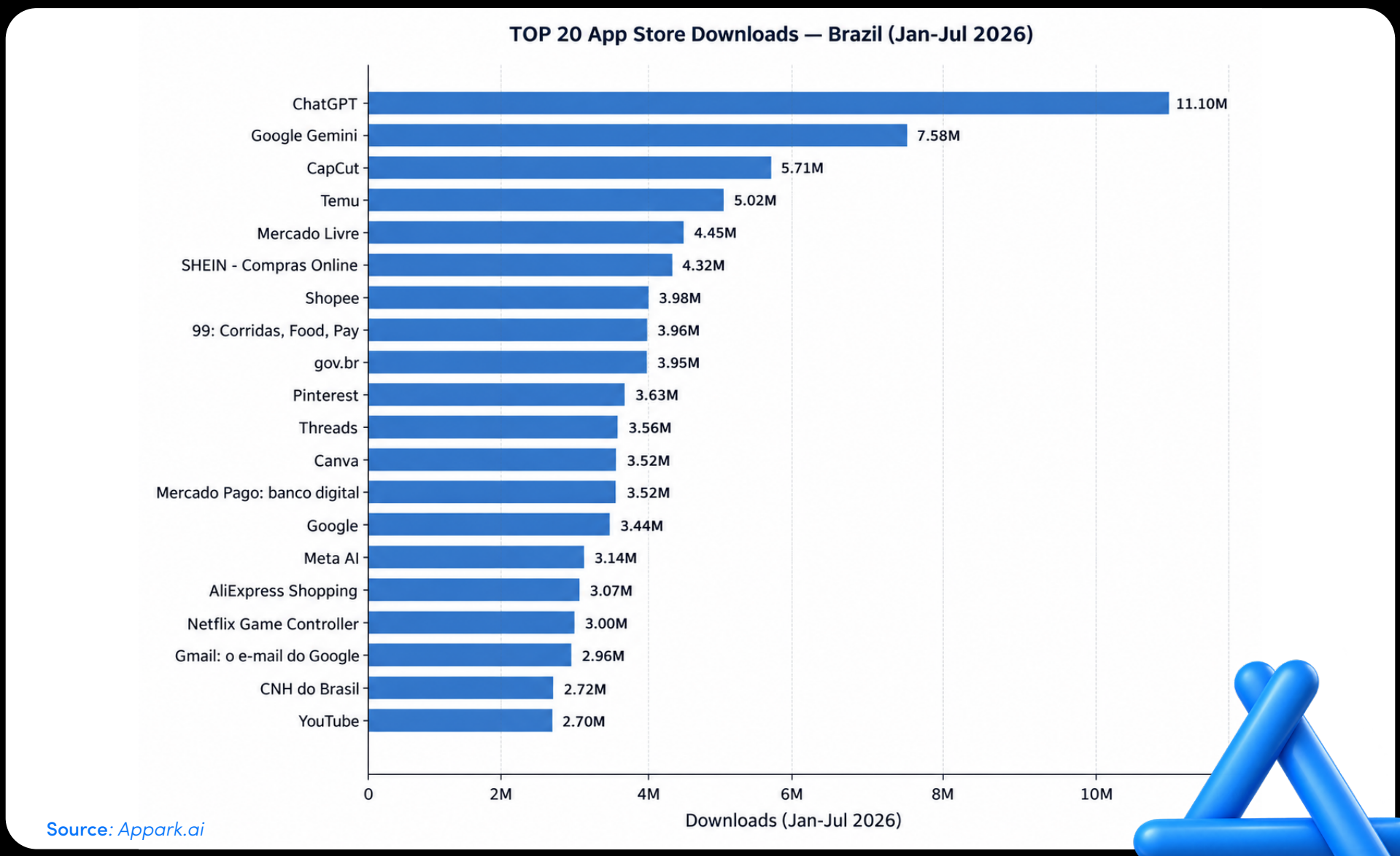
Two micro-drama apps (ReelShort and DramaBox) entered the revenue TOP20, confirming that this emerging content format has a working paid model. However, per-app revenue still trails the leading streaming platforms by a multiple, indicating that the sector remains in a penetration phase with room to deepen monetization.

A Clear Mismatch Between Traffic and Monetization, as Essential-Need Tools Lag in Commercialization

Compared with the downloads chart, government and public-service apps with extremely high download volumes failed to enter the revenue TOP20, while subscription tools and content platforms — despite not being download leaders — lead on revenue. This reflects a pronounced divide in Brazil between "traffic-driven" and "monetization-driven" verticals, where the commercial potential of everyday utility apps has yet to be released.



App Store Downloads: AI Leads the Top Tier, with Tools and E-Commerce Both Strong



Source: *Appark.ai*

Brazil Market: Top 20 Revenue Rankings, January–July (Android & iOS)

Based on the App Store downloads TOP20:

AI Tools Dominate the Top Tier, Leading in High-End User Penetration

ChatGPT and Google Gemini claimed the top two positions. Generative AI is penetrating the high-end iOS user base faster than any other category, making it the core growth vertical within Apple's ecosystem, with a pronounced concentration effect at the top.

Cross-Border E-Commerce Platforms Cluster on the List as iOS Becomes the Primary High-Value Consumer Battlefield

Four cross-border platforms — Temu, SHEIN, Shopee and AliExpress — all entered the TOP20, joined by local e-commerce player Mercado Livre, giving the commerce vertical five seats in total. iOS users stand out for their spending power, making them the core high-value segment that cross-border platforms compete for.

Productivity Tools Feature Densely, Reflecting Pragmatic User Needs

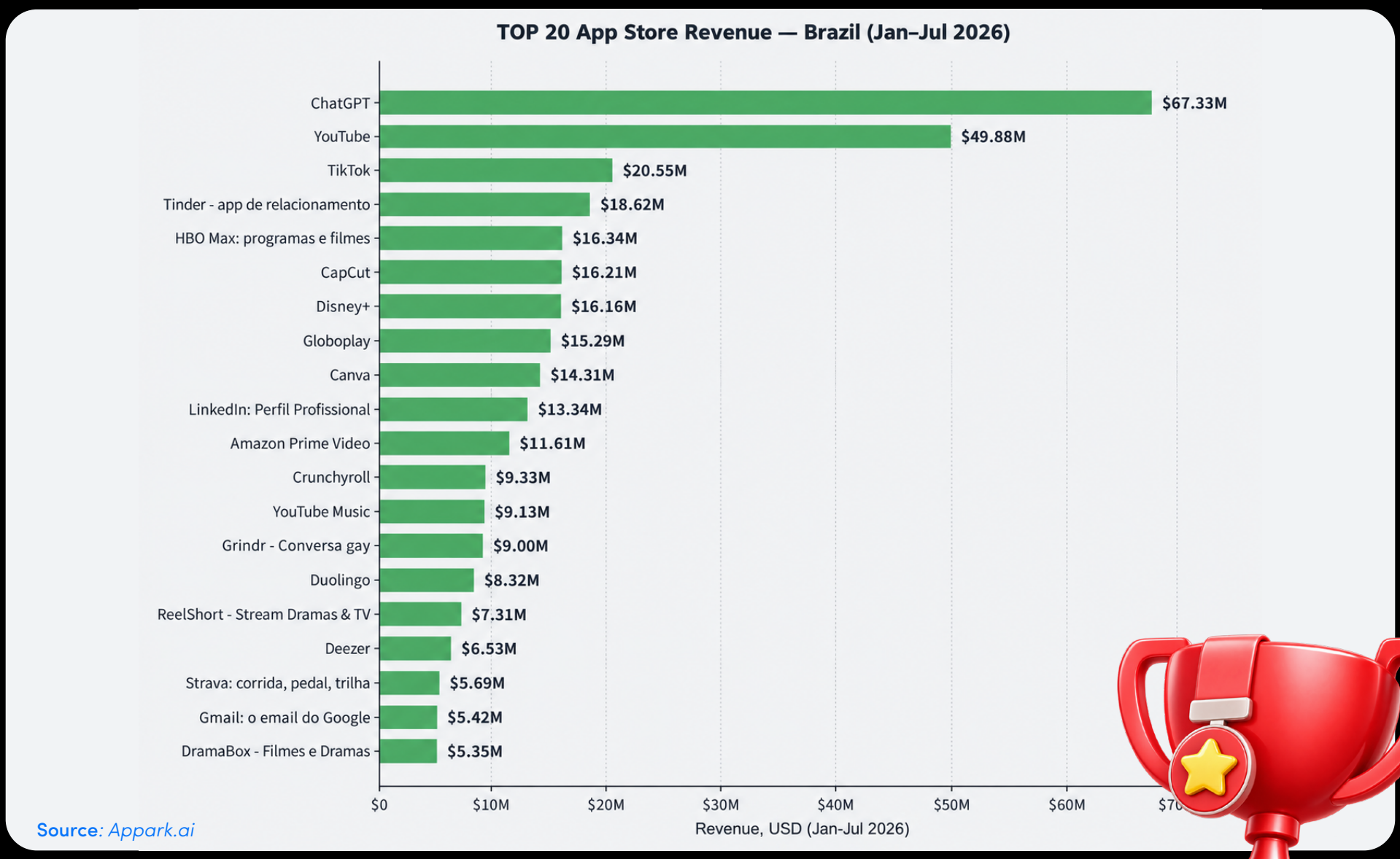
Tools and content platforms such as CapCut, Canva, Google, Gmail and YouTube account for a prominent share, indicating that Brazilian iOS users place greater emphasis on productivity, content creation and information efficiency. Utility products enjoy a stable base within Apple's ecosystem.

Local Government Essential-Need Apps Prove Resilient, with Coverage Across All User Segments

Local government and financial tools such as gov.br, the CNH driver's license app and Mercado Pago hold steady positions in the middle of the rankings. Essential daily-need apps are not constrained by user segment, maintaining high penetration even among high-end iOS users — a sign of comprehensive coverage of digital public services.



App Store Revenue: AI Payments Break Away as Spending Shifts Toward Experience-Driven Consumption



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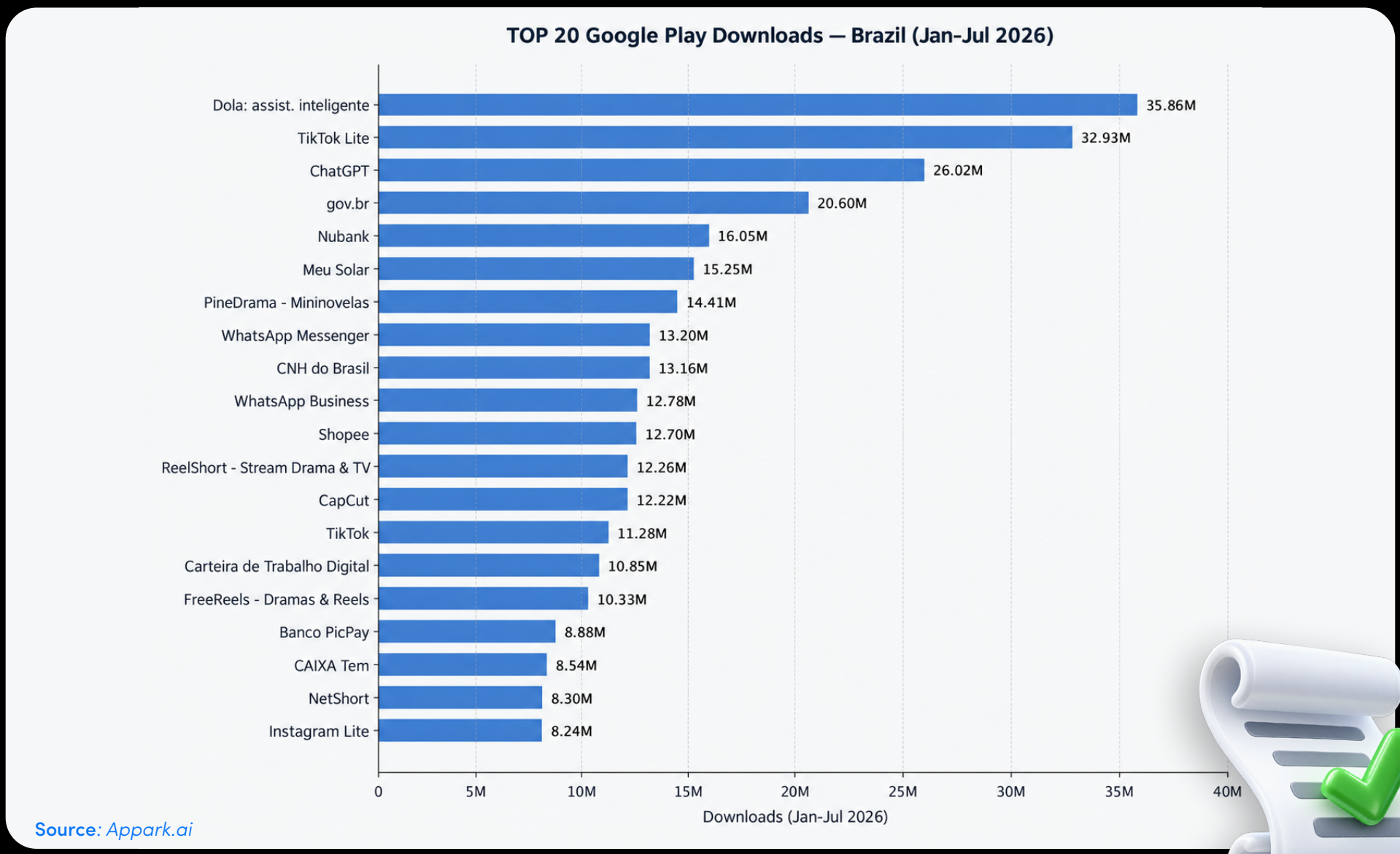
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Google Play Downloads: Local Essential Needs Anchor the Base as Emerging Content Captures Mass-Market Traffic



Source: *Appark.ai*

Brazil Market: Top 20 Revenue Rankings, January–July (Android & iOS)

Based on the App Store downloads TOP20:

A Local AI App Leads the Market as Generative AI Penetrates the Mass Market

Dola took the top spot by a wide margin with close to 36 million downloads, and ChatGPT ranked third. AI apps occupy the top traffic tier on Android, with generative AI gaining full traction among Brazil's mass-market users and locally adapted products demonstrating an even stronger traffic advantage.

Short-Form Drama Explodes as Android Becomes the Core Acquisition Channel

Four micro-drama apps (PineDrama, ReelShort, FreeReels, NetShort) entered the TOP20, each with more than 8 million downloads — far more than on iOS. Short-form drama is penetrating the mass-market Android user base faster, making it the primary acquisition driver for this emerging content vertical.

Local Livelihood and Finance Apps Approach Half the List, Anchoring a Solid Essential-Need Traffic Base

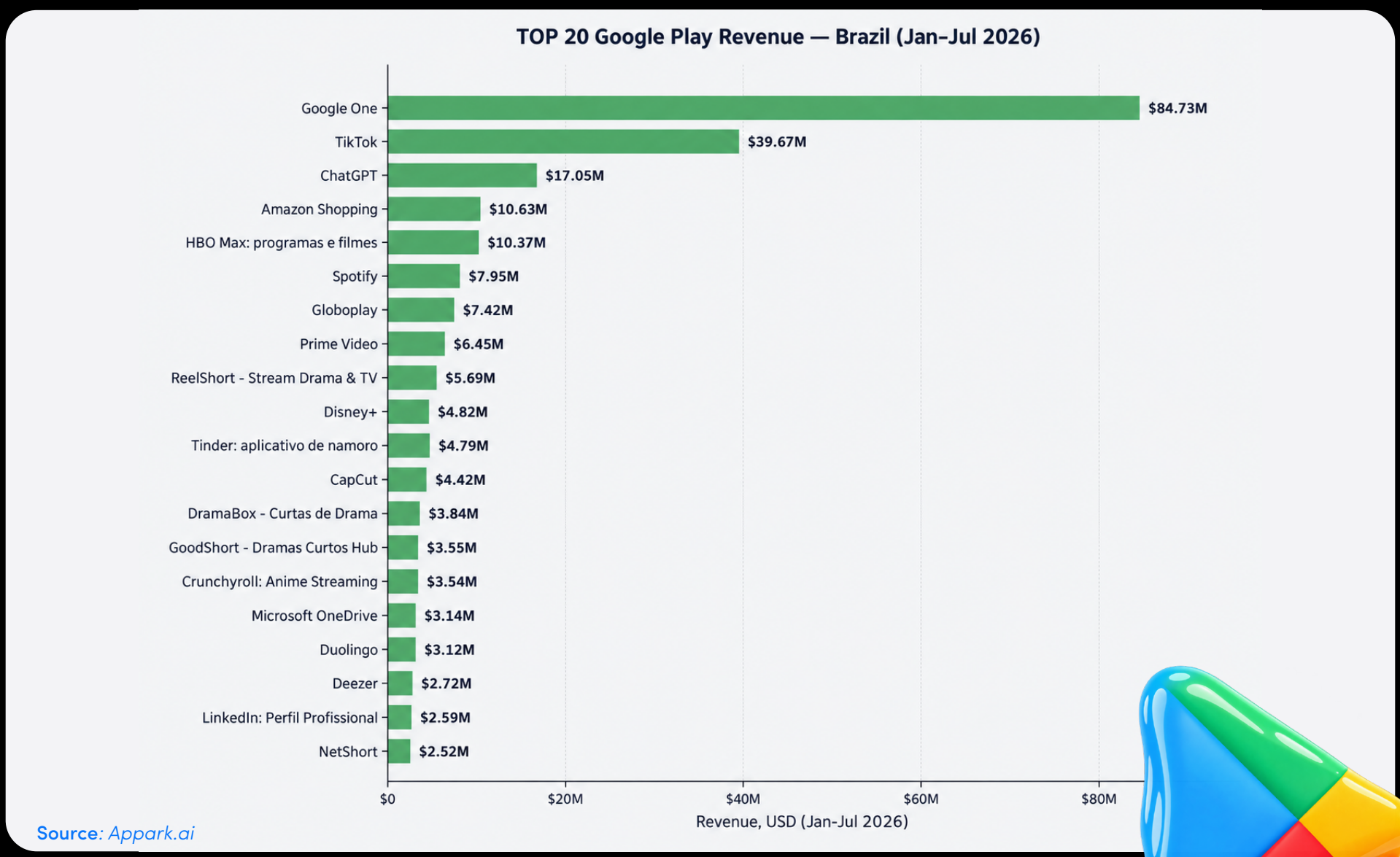
Local government, financial and social-welfare apps account for close to half of the list, with gov.br, Nubank, the CNH driver's license app and the Digital Work Card each exceeding 10 million downloads. Brazil's Android market is deeply tied to essential daily needs, giving local utility apps an unshakable traffic foundation.

Lightweight Versions Prevail, Well Suited to Mass-Market Characteristics

Both TikTok Lite and Instagram Lite made the list. Leading social platforms are using lightweight versions to reach the mass market, precisely matching the characteristics of Brazil's Android landscape — fragmented devices and high sensitivity to data costs. Going lightweight is a key and effective strategy for acquiring mass-market users.



Google Play Revenue: Native Subscriptions Build a Moat as Mass-Market Monetization Structures Diverge



Brazil Market: Top 20 Revenue Rankings, January–July (Android & iOS)

Based on the Google Play revenue TOP20:

Native-Ecosystem Subscriptions Lead by a Wide Margin, Highlighting the Android Moat

Google One ranked first with more than US$84 million in revenue — over twice the figure of the runner-up. Leveraging its native integration with the Android system, cloud storage subscriptions have become the most monetizable category on Android, with a pronounced ecosystem moat.

Content Subscriptions Form the Revenue Foundation as Short-Form Drama Monetization Accelerates



Long-form video and music streaming account for nearly half of the list, serving as the core pillar of Android revenue. Four micro-drama apps entered the TOP20 at the same time, with ReelShort breaking into the top ten — evidence that this emerging format has completed commercial validation in the mass market, with multiple products crowding into the vertical.

Category Structure Diverges Clearly, Reflecting Distinct Mass-Market Attributes

Compared with iOS, AI tools on Android rank notably lower in both position and magnitude, while e-commerce apps broke into the top five. This indicates that mass-market Android users spend more on physical goods and accessible content, and show weaker willingness to pay for premium tools than users in Apple's ecosystem.

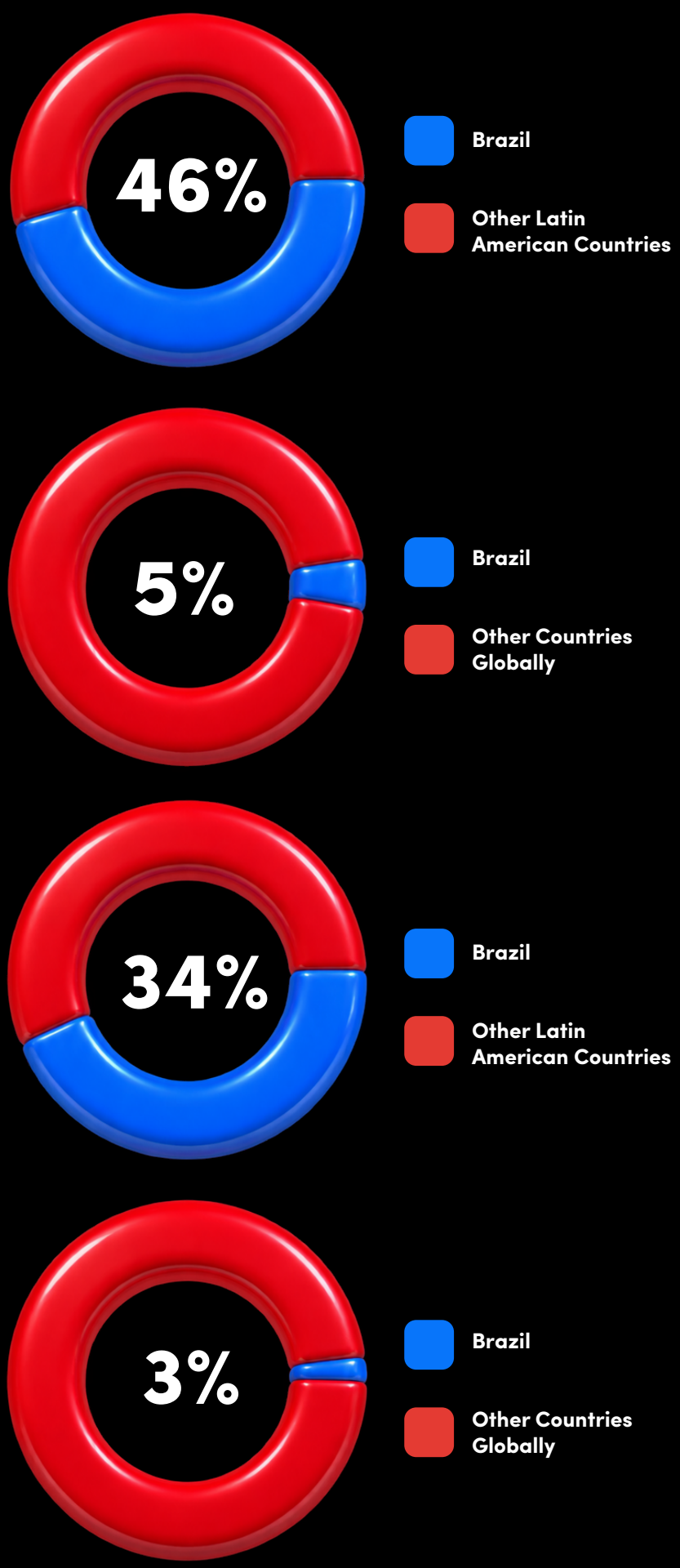
A Pronounced Traffic-to-Monetization Mismatch, with Local Essential-Need Monetization Still Untapped

Local government and financial apps that hold a high share of the downloads chart do not appear at the top of the revenue rankings. Android revenue is heavily concentrated in overseas subscription products; while local everyday utility apps command enormous traffic, their commercial potential has yet to be fully tapped, leaving a clear gap between traffic and monetization.



Brazil as a Core Latin American Market with Considerable Global Growth Potential

Brazil's Share of Downloads in Latin America and Globally



Analysis based on Brazil's share of downloads in Latin America and globally:

1. A Solid Regional Core Position, Making Brazil the Key Anchor for Any Latin America Strategy

Brazil contributes 46% of downloads in Latin America — close to half the region — making it the undisputed core of the Latin American non-gaming app market. With the region's largest user scale and market capacity, it is the preferred entry point for companies expanding into Latin America.

2. Global Share Remains Low, Leaving Ample Room for Further Market Penetration

Brazil accounts for only 5% of global downloads, a limited share of the worldwide total. The market is far from saturated, offering sufficient headroom whether for deepening penetration among local users or expanding global share.

A Gap Between Traffic and Monetization, with Broad Room to Improve Commercialization

1. A Lower Share of Latin American Revenue Than of Traffic, Pointing to Weak Local Monetization Efficiency

Brazil contributes 34% of revenue in Latin America, significantly below its 46% share of downloads. Its advantage in traffic scale has not translated into an equivalent revenue advantage, meaning local users' spending power and the market's commercialization efficiency both lag behind the Latin American average.

2. An Even Smaller Share of Global Revenue, Leaving Ample Room for Commercial Penetration

Brazil accounts for only 3% of global revenue — narrowing further from its 5% share of downloads. The market lacks commercial depth, and there remains substantial room to improve both user payment habits and per-user value.

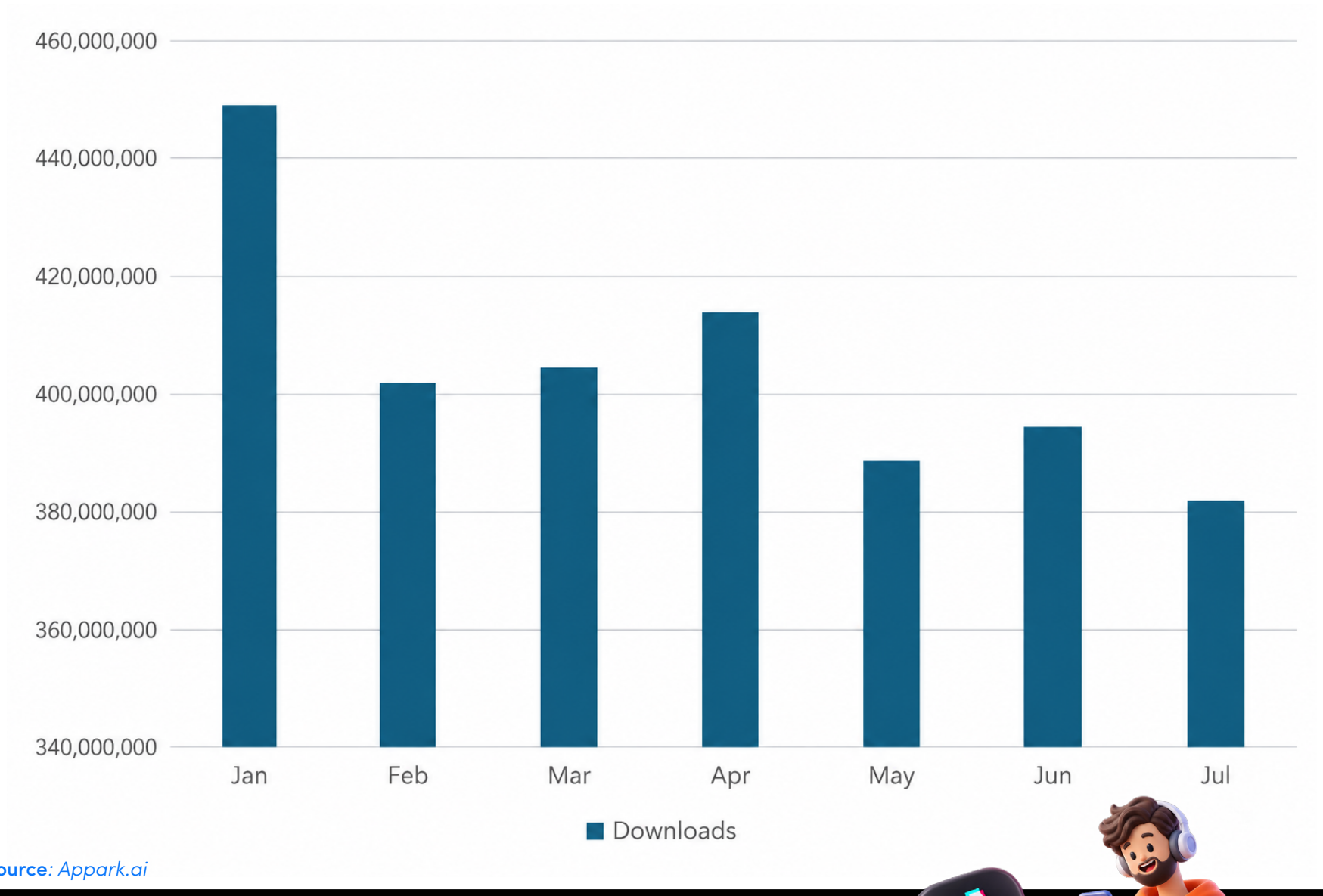
Source: *Appark.ai*

CHAPTER 1

1.2 How Competition Is Changing Brazil's Mobile App Market



The Overall Market Has Peaked and Is Declining as It Enters a Phase of Competition for Existing Users



Source: *Appark.ai*

Jan–Jul App Download Trend



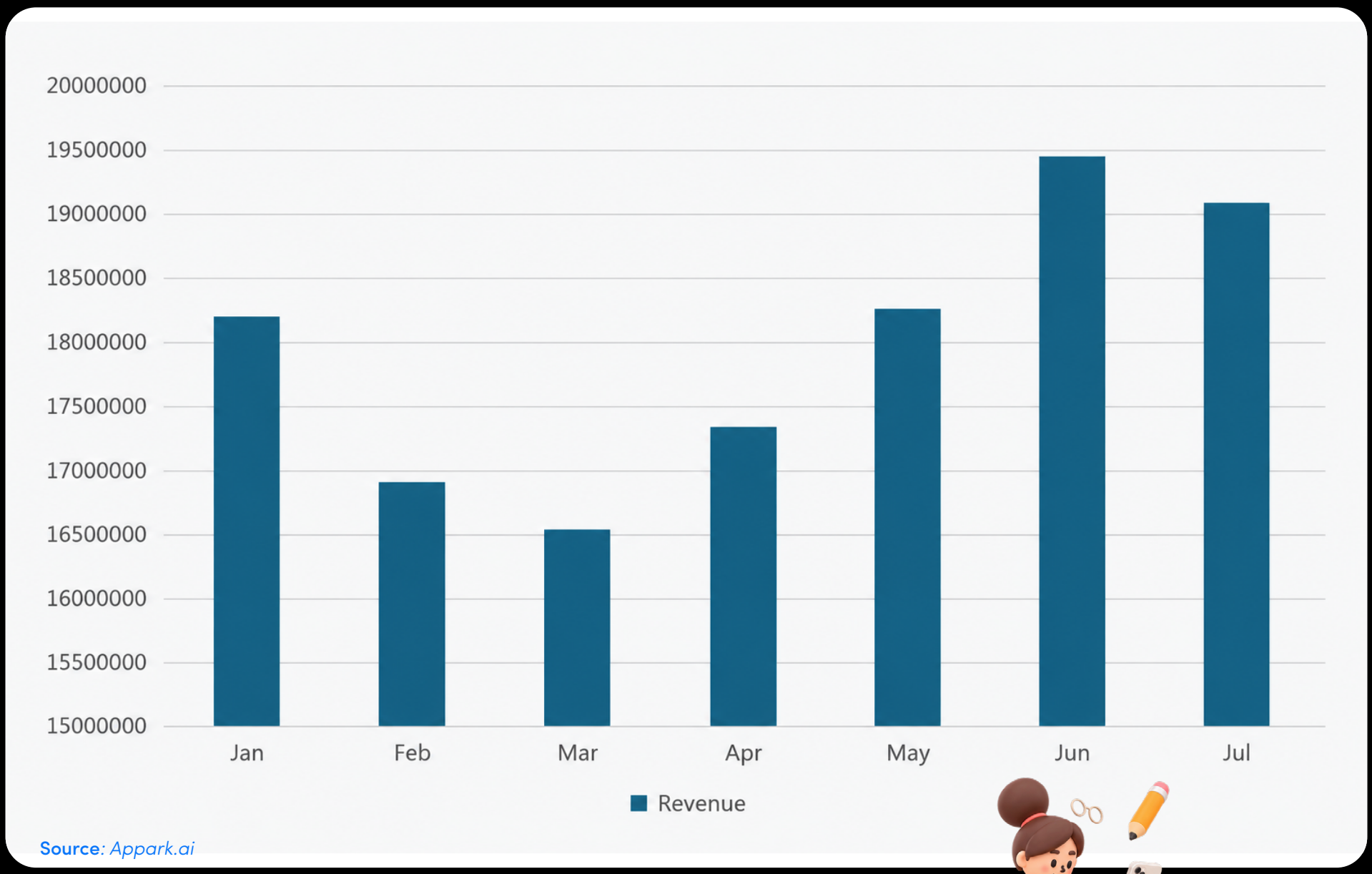
The overall download market keeps falling; the market shifts to stock competition

After hitting its first-half peak in January, monthly downloads trended down with volatility; headroom for new non-gaming app installs in Brazil is narrowing, and the market logic is shifting from user acquisition to retaining existing users.

Ad spend and downloads diverge; category fragmentation and involution intensify

Continued ad-spending expansion contrasts with a shrinking download market, pushing user-acquisition efficiency lower at the margin; top categories keep siphoning users while long-tail genres face mounting pressure.

Revenue Shows Resilient Recovery as Monetization of Existing Users Continues to Improve



Source: *Appark.ai*

Jan–Jul App Revenue Trend



Revenue dips first then rebounds; the commercial foundation shows strong resilience

Revenue pulled back through Q1 and bottomed in March, then recovered and climbed from Q2, surpassing the start-of-year level in June to a first-half peak; Brazil's non-gaming app revenue base is stable with solid repair momentum.

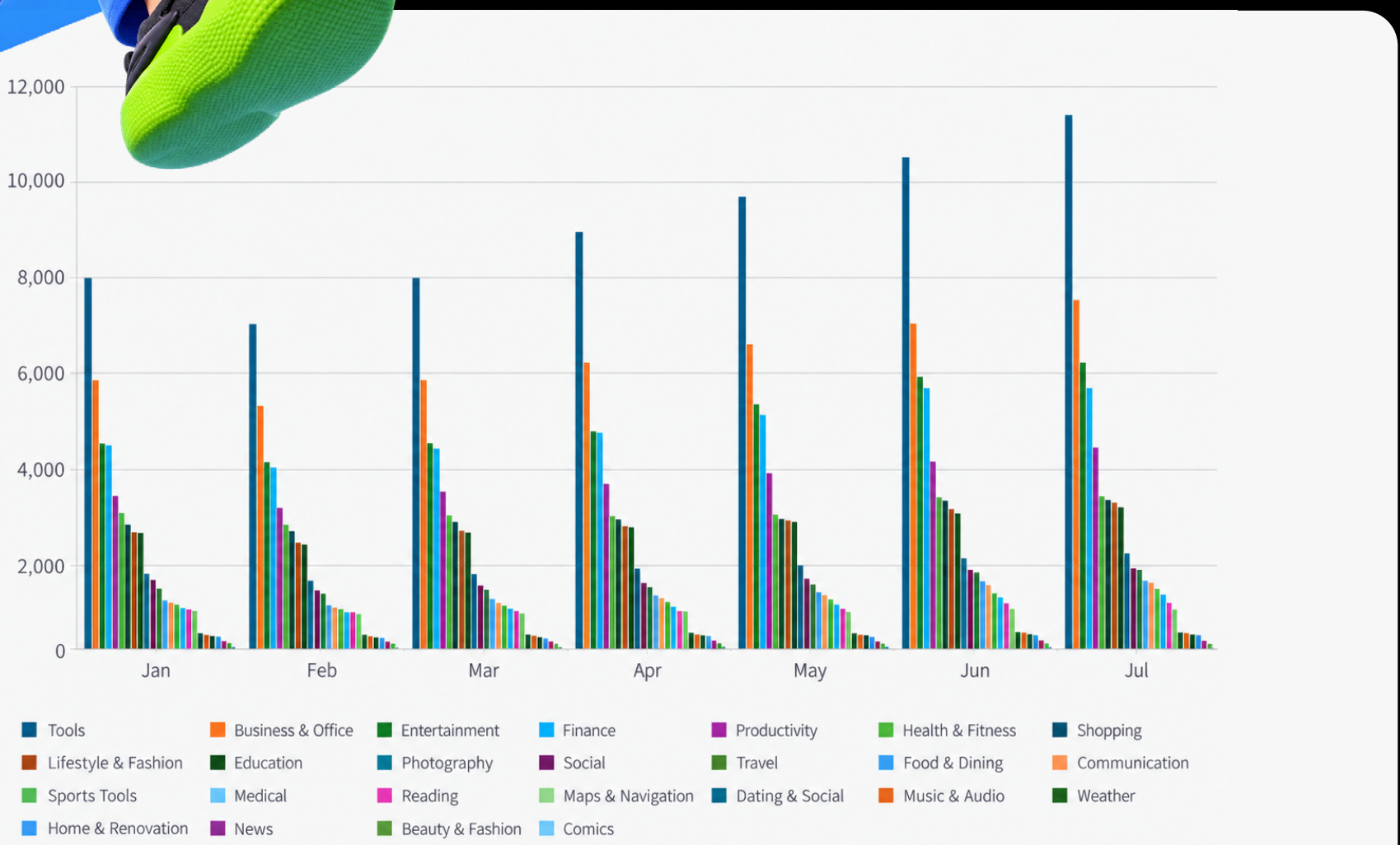
Revenue growth diverges from downloads; stock monetization efficiency rises markedly

Against a persistently shrinking download market, revenue rose counter-cyclically, creating a clear scissors gap that reflects a shift from buying new users to mining the existing base; per-user value and monetization efficiency are steadily rising.

Ad Spend Keeps Increasing Across Multiple Verticals

Producing a Differentiated Growth Landscape





Source: *BigSpy*

1. Ad Spend Expands Against the Trend as Acquisition Competition Diverges from Overall Downloads

The number of advertisers rose consistently from January to July. Even as monthly app downloads in Brazil fell back from their January peak, advertisers showed no willingness to scale back. The industry has entered a phase of involution defined by “rising spend, diminishing new-user dividends,” with continued upward pressure on acquisition costs.

2. Expanding Ad Spend Drives Revenue Recovery, as Advertising Investment Ultimately Converts into Commercial Value

During the period of continuous expansion in the advertiser base, market revenue bottomed out in March and recovered month by month. Sustained competition on the advertising side did not simply consume traffic; instead, refined operations revitalized the existing user base and improved monetization efficiency, ultimately driving a counter-trend rise in revenue.

CHAPTER 2

Mobile App Trends 2026

Strategic Priorities for the Next Phase



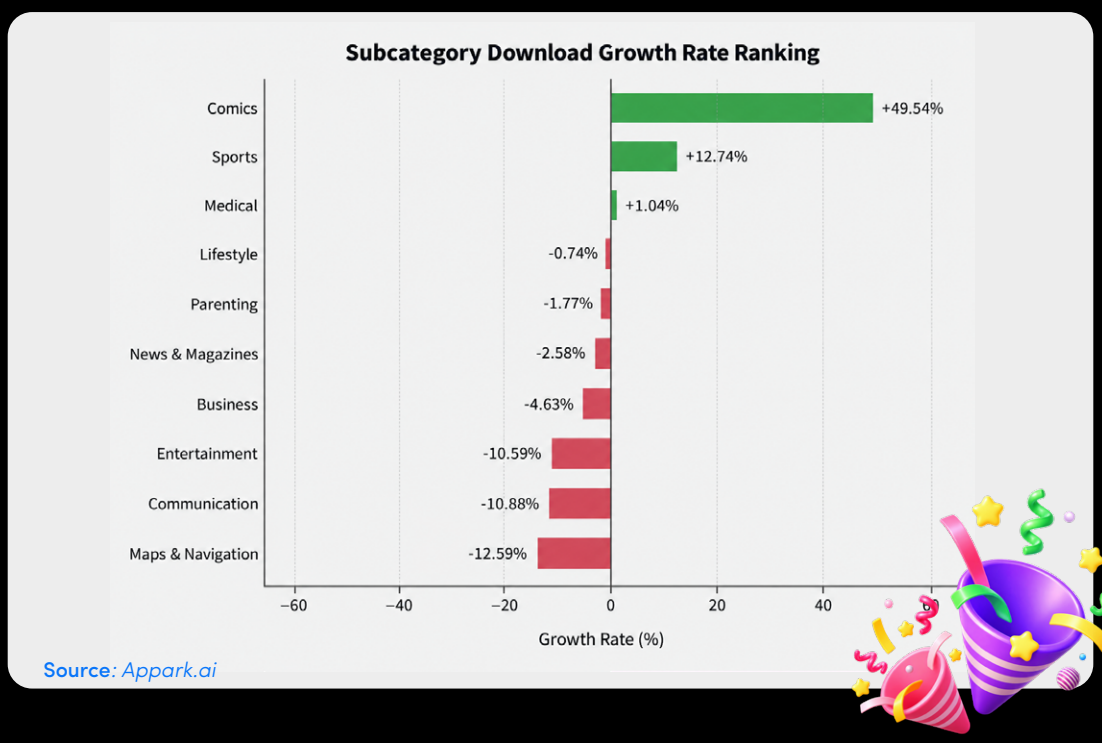
2.1
Which App Categories Are Leading Growth in Brazil?

Looking at download and revenue growth rates across sub-categories, the growth engines of Brazil's two major app stores are completely diverging: Google Play is driving overall growth through vertical entertainment and practical utility apps, while App Store growth comes from consumer shopping and professional productivity tools. User needs and paymentpreferences differ significantly between the two ecosystems, and the growth opportunities vary from vertical to vertical.



Comics vs. Shopping: A Sharp Divide in the Leading Growth Categories Across the Two Platforms

Google play
Subcategory Growth Ranking



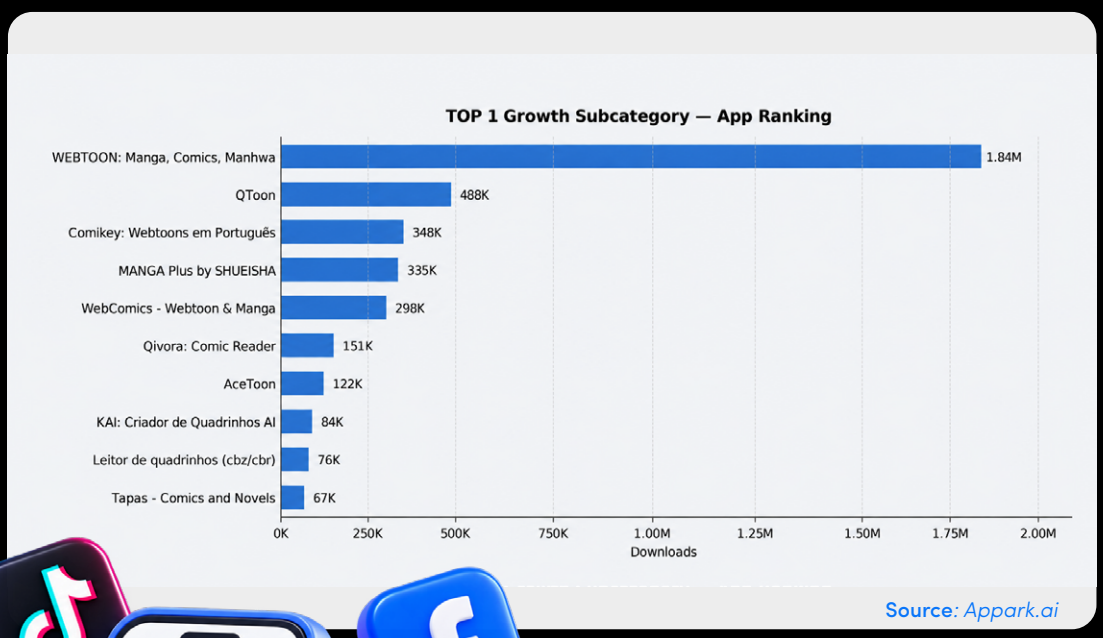
Source: *Appark.ai*

1. Comics Lead by a Wide Margin, Becoming the Market's Core Growth Engine

On Google Play downloads in Brazil, the comics category topped the chart with nearly 50% growth, the only vertical to achieve high growth. Sports and medical saw only marginal gains, while traditional broad categories such as entertainment, communication and news all fell into negative growth — market growth momentum is tilting decisively toward vertical content.

2. A Pronounced Concentration Effect at the Top, with Localization Creating Niche Opportunities

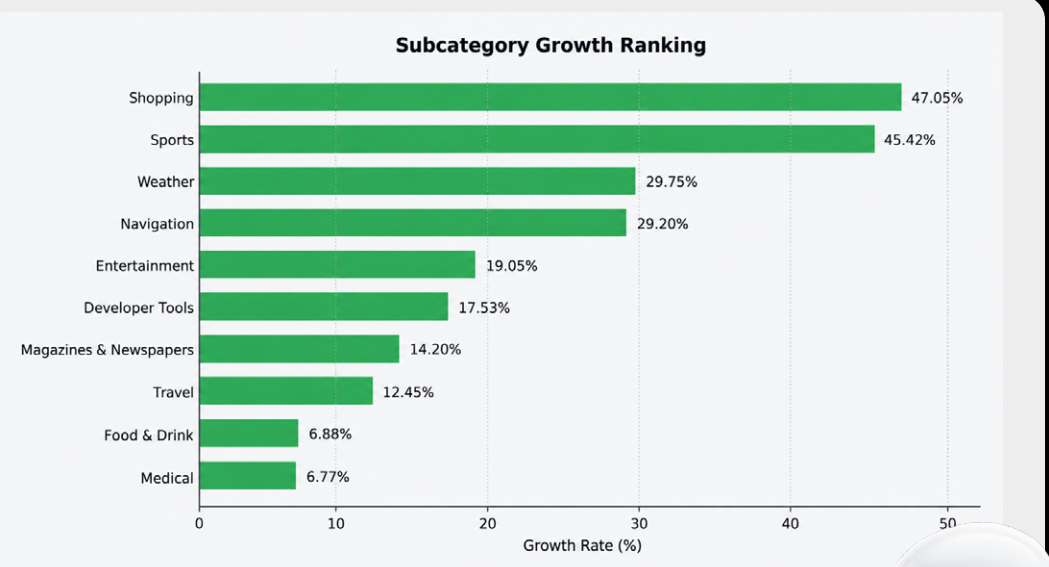
The comics vertical shows a winner-takes-all competitive landscape, with WEBTOON leading downloads by a wide margin. At the same time, local Portuguese-language comics platforms rank among the top, indicating that language and content localization are the key levers for entering this growth vertical, while niche reading tools and specialized genres still offer room for differentiation.



Source: *Appark.ai*



App Store
Subcategory Growth Ranking



Source: *Appark.ai*

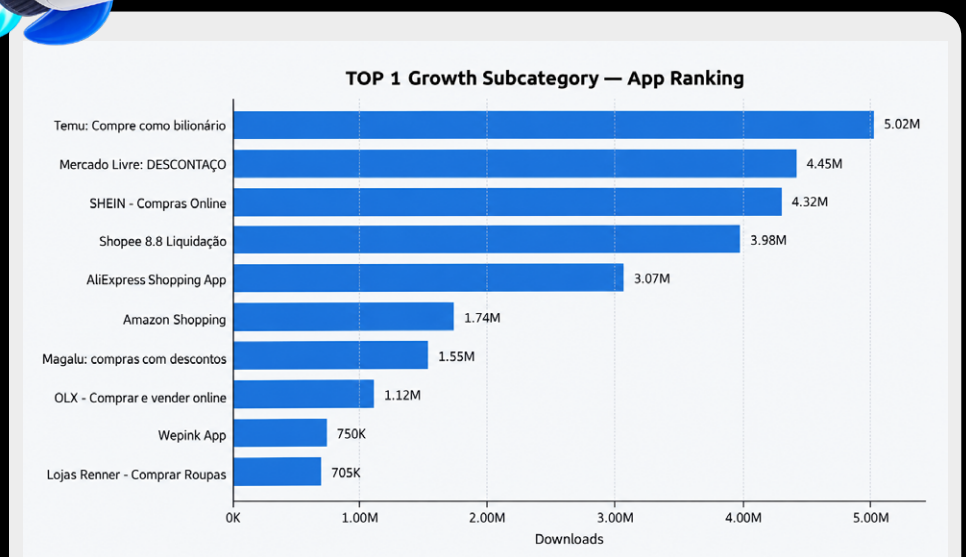
1. Shopping Leads iOS Growth as Consumer Service Categories Rise Across the Board

On the App Store, the shopping category topped the chart with 47.05% growth. Lifestyle service categories including sports, weather and navigation all achieved double-digit growth, and every one of the top ten categories recorded positive growth — consumer and service demand among high-end users is being released more fully.



2. Cross-Border Platforms Dominate the Top Tier as Local E-Commerce Holds Niche Positions

The top of the shopping vertical is entirely occupied by cross-border platforms such as Temu and SHEIN, with the top four each exceeding 3 million downloads. Local platforms Mercado Livre and Magalu follow close behind. High-value iOS users have become the core battleground for cross-border e-commerce, while local brands retain a differentiated share on the strength of their local market capabilities.



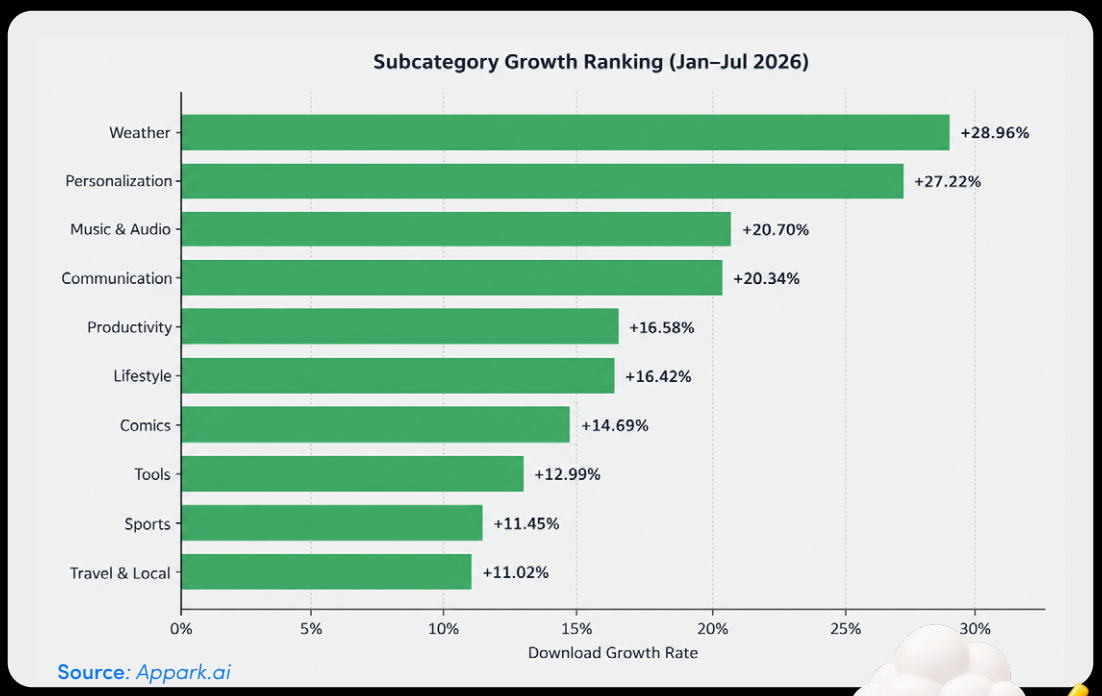
Source: *Appark.ai*

In summary: *Google Play's traffic growth is concentrated in mass-appeal vertical content such as* **comics**, *where demand for lightweight entertainment among mass-market users is strong; App Store download growth is driven by the cross-border shopping vertical, where high-net-worth users show a stronger willingness to spend. E-commerce is the core incremental opportunity within the iOS ecosystem.*



Weather and Navigation Lead Monetization as Vertical Tools Unlock New Paid Growth

Google play
Subcategory Growth Ranking



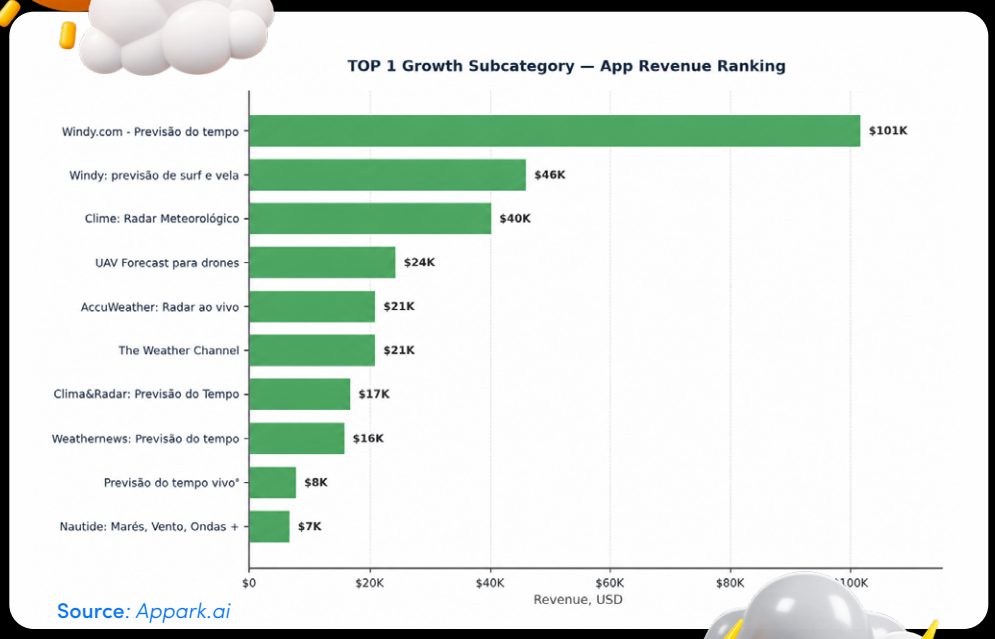
Source: *Appark.ai*

1. Weather Leads Revenue Growth as Utility App Monetization Accelerates

On Google Play revenue, the weather category ranked first with 28.96% growth. Tool-oriented categories including personalization, music and audio, communication, and productivity all achieved double-digit growth. Compared with traditional content subscriptions, willingness to pay for practical utilities is being released rapidly, making utility apps a new driver of revenue growth in the Android market.

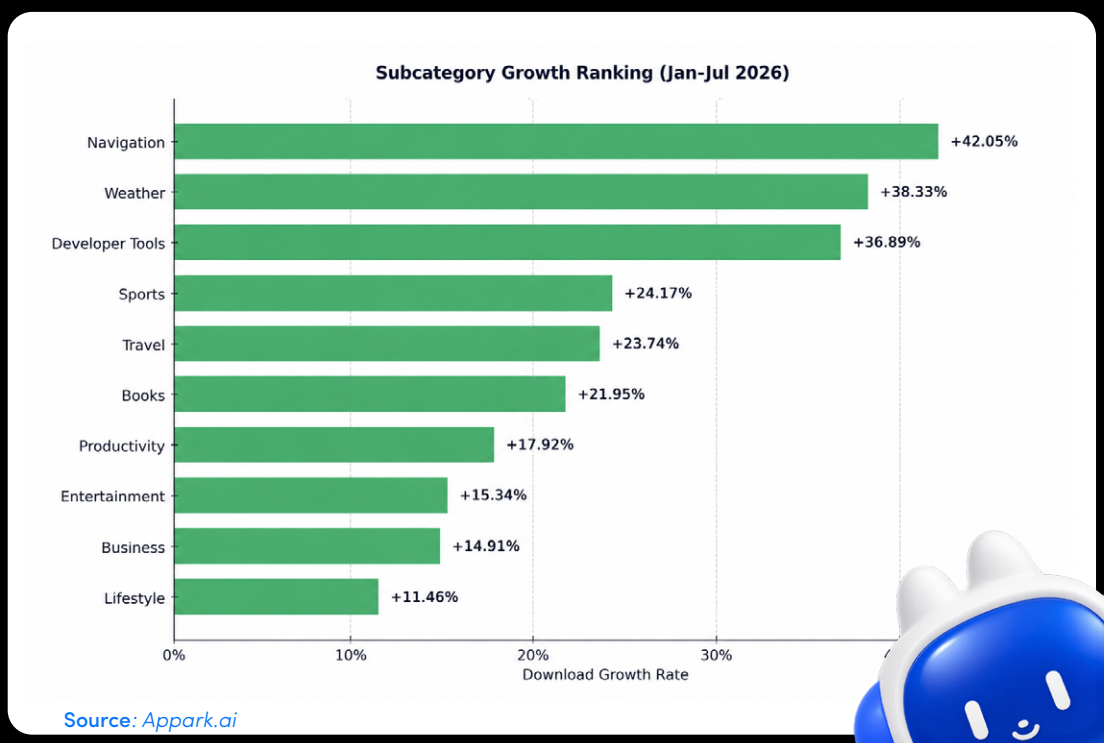
2. Scenario-Specific Segmentation Drives Payments as the Weather Vertical Concentrates at the Top

Within the weather vertical — the fastest-growing category — the Windy product line monopolizes the top two positions, while specialized scenario products have emerged covering surfing forecasts, drone weather and ocean tides. By extending from general-purpose tools into value-added services for specific scenarios, small categories are able to unlock user payments, and leading brands have already built a clear competitive advantage.



Source: *Appark.ai*

App Store
Subcategory Growth Ranking



Source: *Appark.ai*

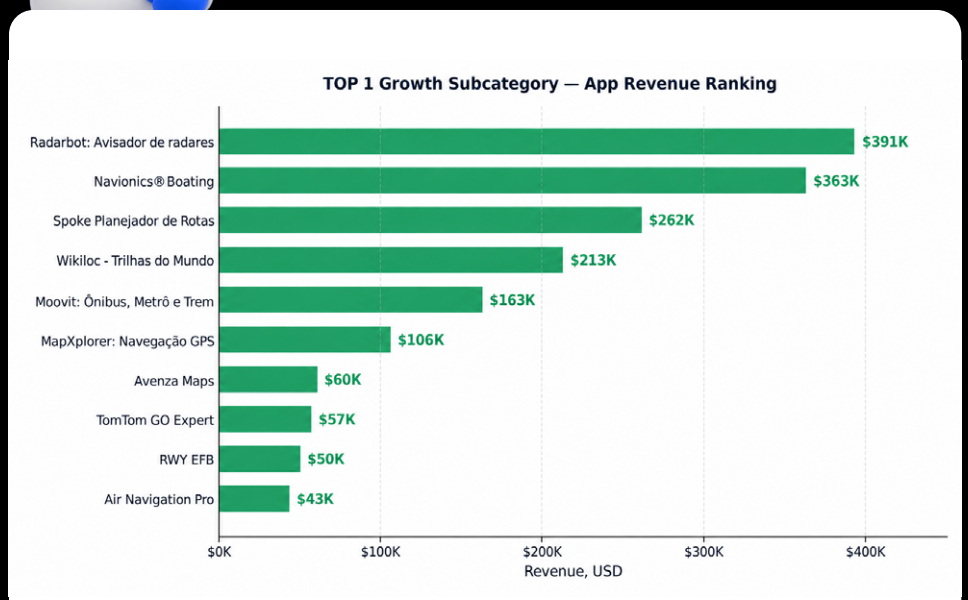
1. Navigation Leads Revenue Growth as Professional Tools Become the Core Monetization Engine on iOS

On App Store revenue, the navigation category topped the chart with 42.05% growth. Tool-oriented categories including weather and developer tools all achieved high growth of around 30%, and every one of the top ten categories posted double-digit gains. High-end users' willingness to pay for professional efficiency tools continues to be released, making utilities the core driver of revenue growth in the iOS market.



2. Vertical Scenarios Mine Payment Value as the Professional Navigation Vertical Shows Clear Dividends

The fastest-growing navigation vertical is not dominated by general-purpose maps; instead, it spans a diverse range of specialized professional scenarios including speed-camera alerts, marine navigation, hiking and aviation. Deep, scenario-specific features are used to unlock payments, and the revenue scale of leading products is substantial — evidence that specialized professional tools enjoy ample monetization space and growth dividends in the high-end iOS market.



Source: *Appark.ai*

In summary: *the monetization dividend in the Android market comes from accessible practical utilities such as* **weather**, *which convert users to paid through lightweight value-added services; the iOS market has a higher payment ceiling, where* **specialized professional navigation and niche productivity tools** *more readily command high subscription revenue. Professional tools hold the greater commercialization potential.*



2.2 Creative Is Becoming the Biggest Competitive Advantage

Filter criteria: ads active in Brazil from Jan to Jul 2026, ranked by estimated impressions from highest to lowest.



In Brazil's TikTok app-advertising market, creative quality is replacing pure delivery scale as the core competitive edge that determines ad impression estimates and conversion performance. In response to the distinct user profiles and platform-algorithm logic across different verticals, both domestic and export-oriented advertisers have evolved differentiated, mature creative paradigms: the AI-tools vertical uses narrative-driven native creatives to resolve the high-bounce-rate pain point of hard-sell ads; the e-commerce vertical leverages contrast-style unboxing content to connect the conversion chain from product seeding to download; and the streaming vertical unlocks compounding algorithmic traffic through interactive recap content. Below, through benchmark breakout cases across these three verticals, we deconstruct the creative methodology and execution roadmap behind high-impression-estimate ads.

Narrative-Driven Native Creative: Building a Core Competitive Advantage in TikTok User Acquisition

Advertiser: Dola · Campaign period: March–April 2026 · Impression estimate: 82.45 million · Vertical: AI tools

Reusing Templates from High-Traffic Verticals to Lower the Cost of Capturing Attention

Leading TikTok creatives commonly reuse high-traffic content verticals already validated locally on the platform as opening hooks, replacing blunt product exposure with everyday, high-conflict scenarios — addressing the high bounce rate of hard-sell advertising at its source. Take Dola's hit ad: it taps into the "couple prank" content vertical that is popular on TikTok Brazil, opening with the dramatic setup of "AI generating a photo of your boyfriend with another woman." It captures user curiosity within three seconds, significantly boosting completion rates.



Scenario-Based Soft Product Placement to Increase Acceptance of Product Value

Abandoning the traditional ad logic of listing features, and instead naturally embedding core product selling points into a complete narrative and usage scenario, is the common creative path to efficient conversion on TikTok today. As the prank storyline unfolds, Dola's ad naturally walks through the full operational chain — uploading an original photo, entering a Portuguese-language prompt, AI generation, and secondary editing — while communicating its differentiated advantages of "no built-in ads and no usage limits." Acceptance of the product pitch is markedly higher as a result.

Localized Emotional Engagement Design to Compound Algorithmic Traffic

Deeply adapting to local language, culture and social sentiment, using topical storylines to stimulate user comments, shares and other interactions, and in turn earning algorithmic traffic weighting, is a common trait of hit ads. Dola's ad uses authentic Brazilian Portuguese throughout, creating talking points through a relatable couple conflict. While driving up engagement metrics, it further amplifies the ad's reach and impression estimate.

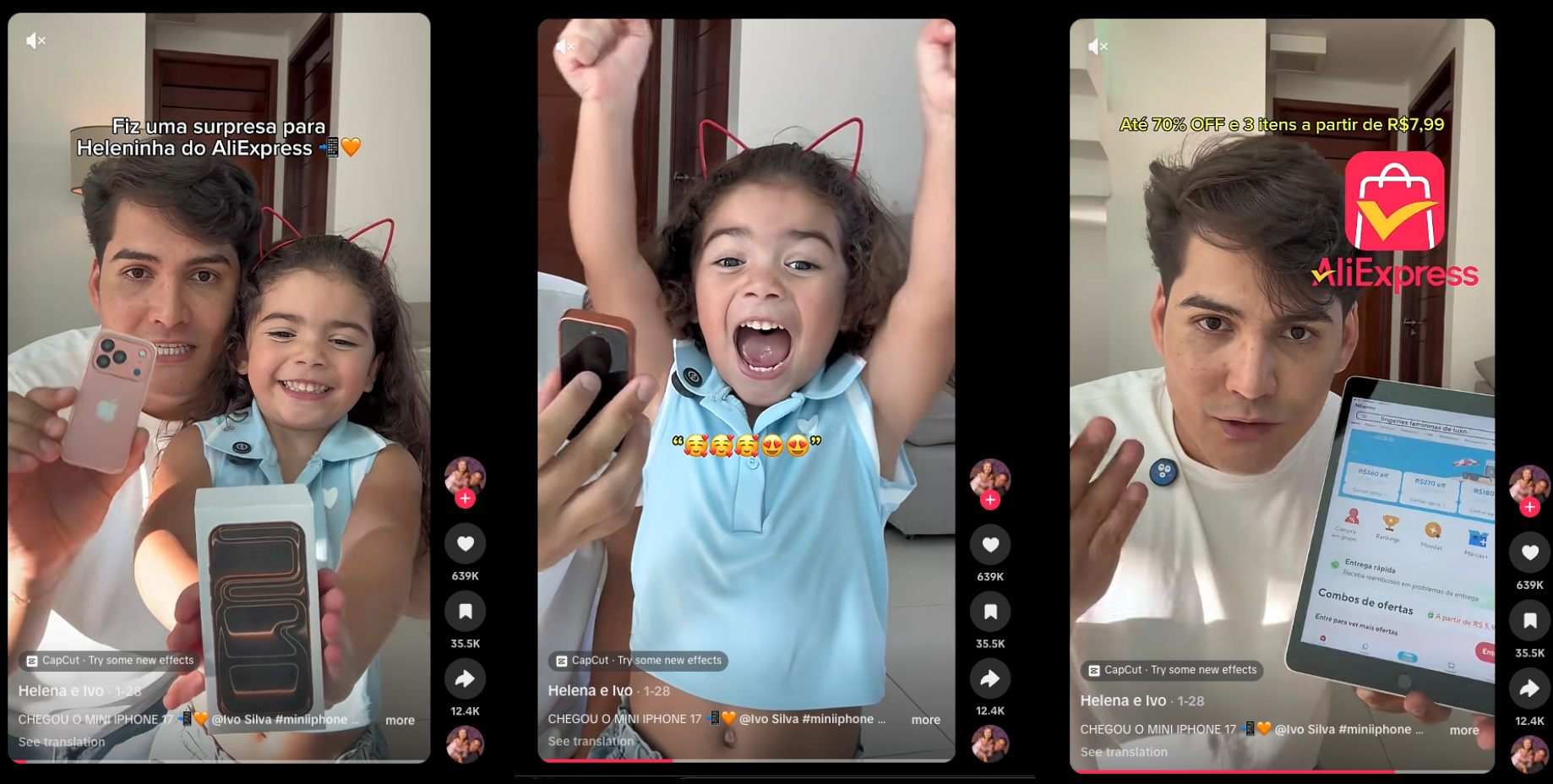
Full video creative: https://www.tiktok.com/@raphaela_macedoo/video/7597944587453336853

Contrast-Driven Unboxing: A High-Conversion Creative Model for the E-Commerce Vertical

Advertiser: AliExpress · Campaign period: June 2026 · Impression estimate: 50.73 million · Vertical: E-commerce

Counter-Intuitive, Curiosity-Driven Openings That Break the High-Bounce Curse of E-Commerce Ads

TikTok e-commerce ads commonly use counter-intuitive, curiosity-driven setups as opening hooks, leveraging user curiosity to extend watch time and break through the traffic ceiling of traditional hard-sell advertising. Take AliExpress's hit ad: it opens with the contrast-driven setup of "unboxing a mini iPhone 17 that just arrived," using the anticipation of an unboxing to hold attention, then reveals the product to be a charger with the same design. The twist creates a memorable hook that significantly improves completion performance.



Everyday-Scenario Storytelling to Reduce Resistance to Commercial Advertising

Carrying the product pitch within genuinely everyday scenarios and replacing sales-pitch voiceovers with natural human emotion is a common approach to improving user acceptance of TikTok e-commerce ads. This ad adopts the everyday perspective of a father-and-daughter unboxing, accompanied by authentic interaction and reactions, naturally conveying the platform's positioning of "affordable, novel finds." The native content quality effectively lowers users' resistance to advertising.

Closing at the Emotional Peak to Complete the Loop from Product Seeding to Download

Releasing promotional information and a call to action at the emotional peak of the content is the standard creative logic for converting traffic efficiently in e-commerce ads. This ad introduces a clear price anchor at the peak of the pitch — "30% off, three items from R$7.99" — combined with a real-screen demo of the app interface and download guidance, directly converting content interest into download action and closing the full-funnel conversion loop.

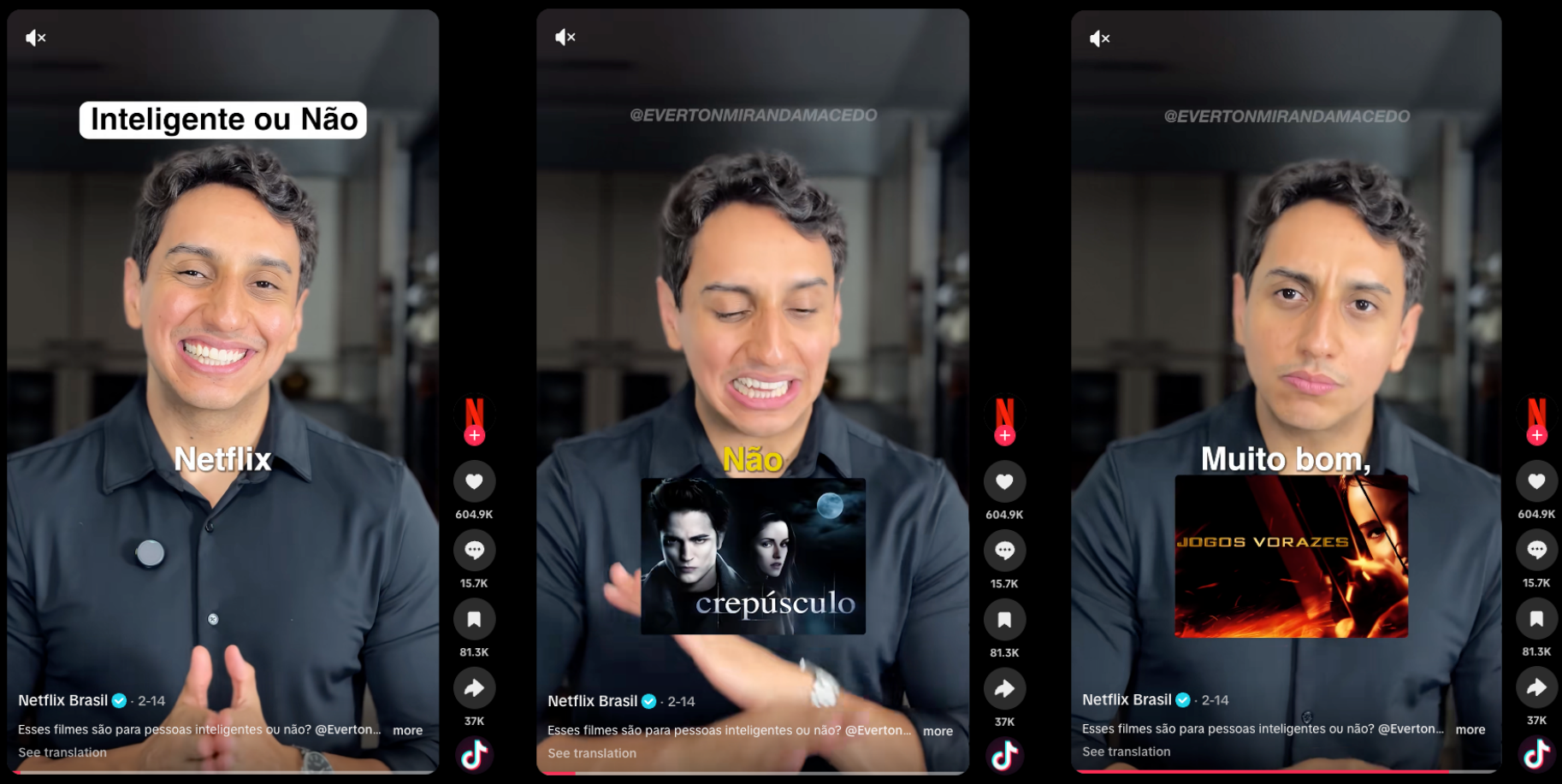
Full video creative: tiktok.com/@test/video/7600434623704861959

Interactive List-Style Seeding: A High-Engagement Creative Model for the Streaming Vertical

Advertiser: Netflix · Campaign period: March 2026 · Impression estimate: 32.62 million · Vertical: Streaming

Question-Based Interactive Openings That Earn Algorithmic Traffic Weighting

TikTok pan-entertainment ads commonly open with topical questions, turning the ad into participatory content interaction and using comments, watch time and other signals to earn favorable algorithmic traffic weighting. Take this hit Netflix ad: it cuts in with the provocative question “Are these films suitable for high-IQ audiences,” prompting viewers to judge along with the video and giving them an urge to respond, effectively lifting both completion rates and engagement metrics.



Soft Placement via Title Lists to Naturally Convey Content Positioning

Packaging a platform’s content library as an entertaining list is a common creative path for streaming ads to lower user resistance and reinforce content advantages. This ad rapidly covers classic global IPs and Brazilian local films, naturally demonstrating the breadth and depth of the platform’s catalog by judging each title one by one — a far more effective seeding approach than hard-sell title-list pushes.

High-Density, Fast-Paced Storytelling Suited to Fragmented Browsing Habits

The ad uses a narrative rhythm of one IP per screen with rapid cuts and quick commentary, matching TikTok users’ preference for short, fast-paced content. It covers more than ten films and shows within a minute, delivering substantial information while continuously holding user attention, maximizing content distribution efficiency and brand mindshare.

Full video creative: https://www.tiktok.com/@test/video/7606521860984966421

2.3 What Top-Growing Apps Are Doing Differently

Mature E-Commerce Vertical: Campaign-Calendar Marketing Drives Acquisition, High-Value Users Anchor a Resilient Revenue Base — Mercado Libre

E-commerce is the core vertical among Brazil's non-gaming apps with the largest user scale, the most mature commercialization and the most intense competition, making it the key lens through which to observe Brazil's digital economy. Brazil is Latin America's largest e-commerce market, with mobile contributing the vast majority of online retail traffic. Local leader Mercado Libre maintains its leading position on the strength of its self-built logistics and payments ecosystem.



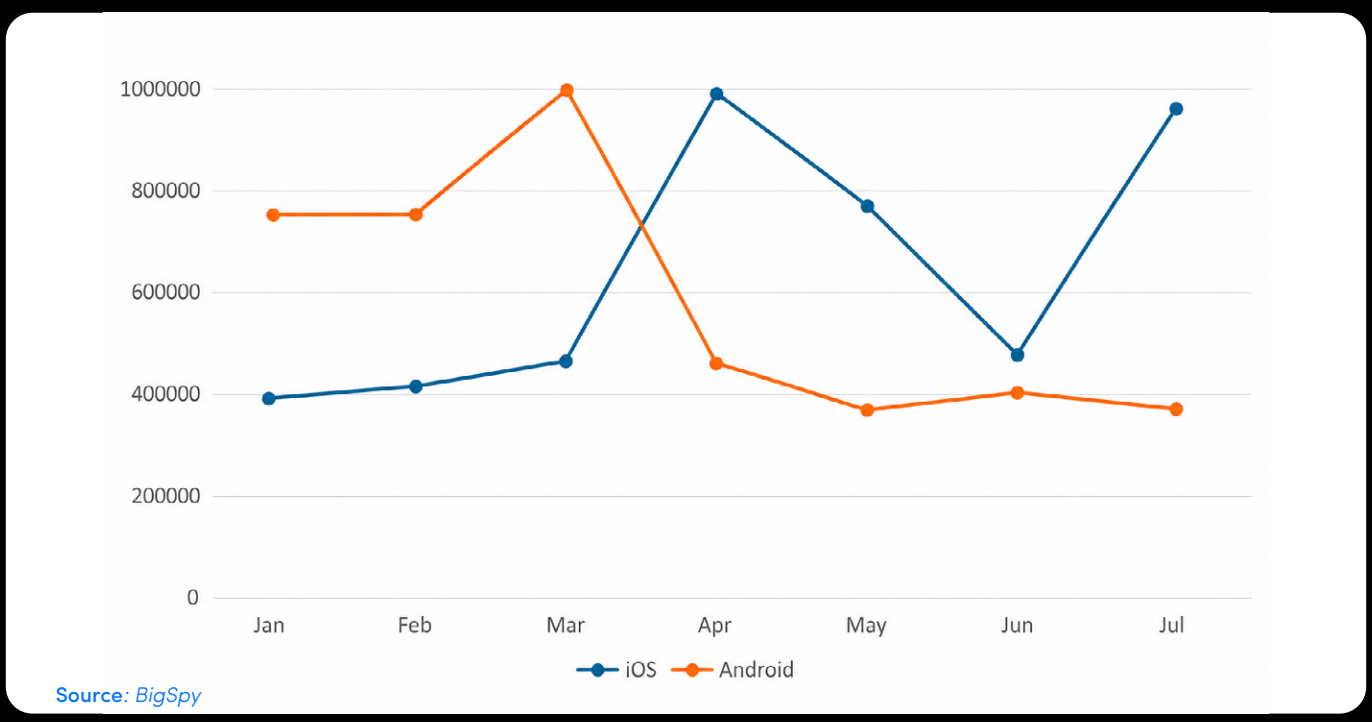
Jan–Jul Ad Volume



Source: *BigSpy*

- Ad volume on both platforms climbed steadily from January to April, peaking in April, then fell off sharply from May. This reflects the phased, high-intensity ad strategy adopted by leading e-commerce players, concentrating budgets to capture the acquisition window, with market competition showing strongly cyclical characteristics.
- Android maintained the lead in ad volume throughout, making it the core acquisition channel in Brazil. The gap between the two platforms narrowed significantly in July, indicating that advertisers are stepping up their penetration of iOS users and that competition is extending from the mass market toward higher-end user segments.

Jan–Jul Ad Volume



Source: *BigSpy*

- The two platforms diverge completely; iOS overtakes as the main acquisition driver

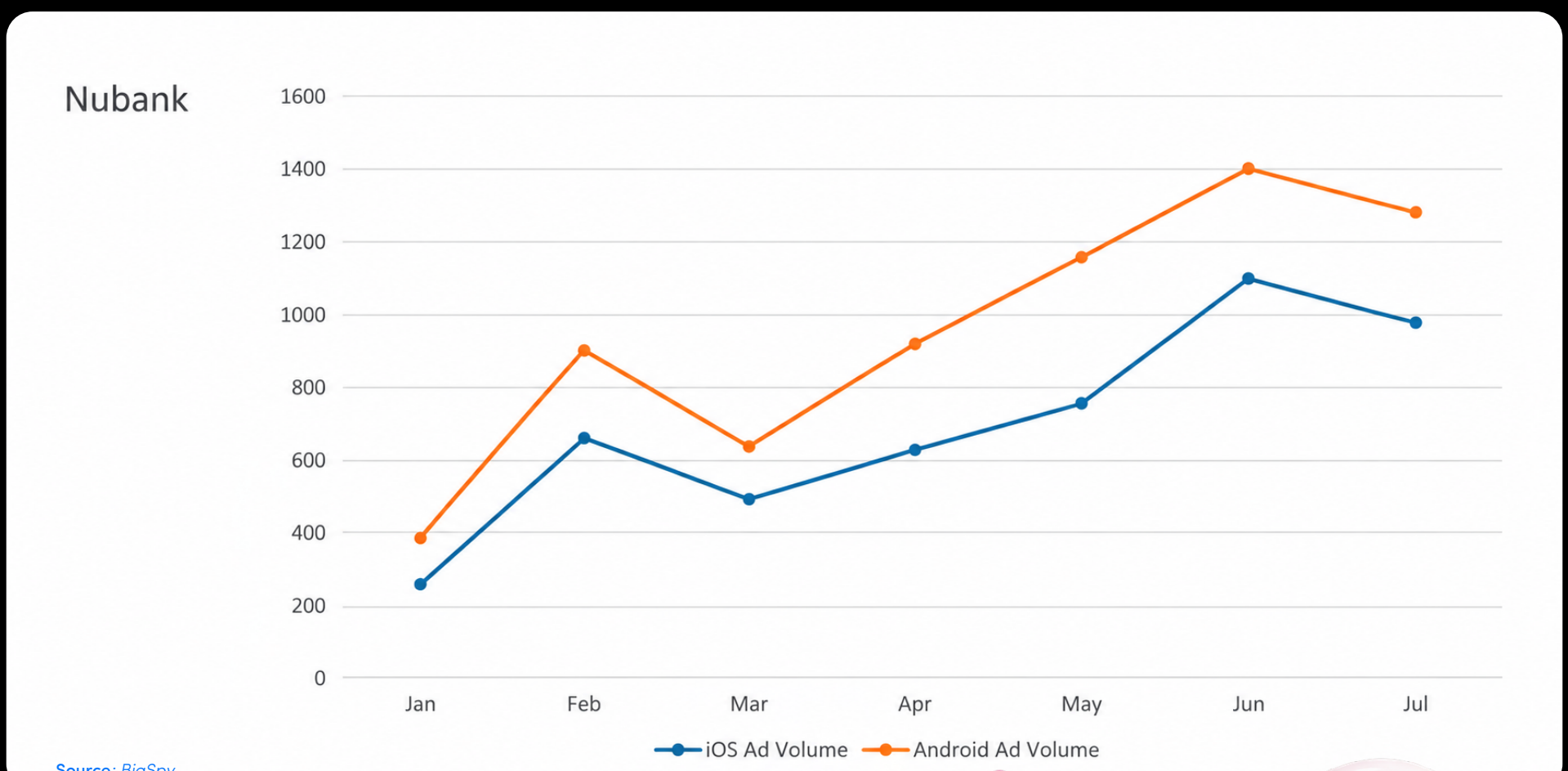
  Android dominated downloads Jan–Mar, peaking in March then declining; iOS fluctuated but kept growing and overtook Android in April, tilting the user base toward high-value iOS users.
- Pulsed acquisition is pronounced; node-based marketing drives clearly

  Downloads show a typical peak-valley rhythm, with periodic peaks in March, April and July tied to major sales or campaign moments—a clear node-driven e-commerce pattern.

Fintech Vertical: Continuous Omni-Channel Acquisition, with Mass-Market Users Building a Steady Revenue Foundation — Nubank

Fintech is Brazil's most resilient, highest per-user-value non-gaming category, now in a high-growth phase on policy and infrastructure tailwinds. The nationwide adoption of Pix instant payments fully activated mobile finance, with digital banks, wallets, P2P transfers and online stock trading all booming at once. Local digital bank Nubank is a representative player.

Jan–Jul Ad Volume

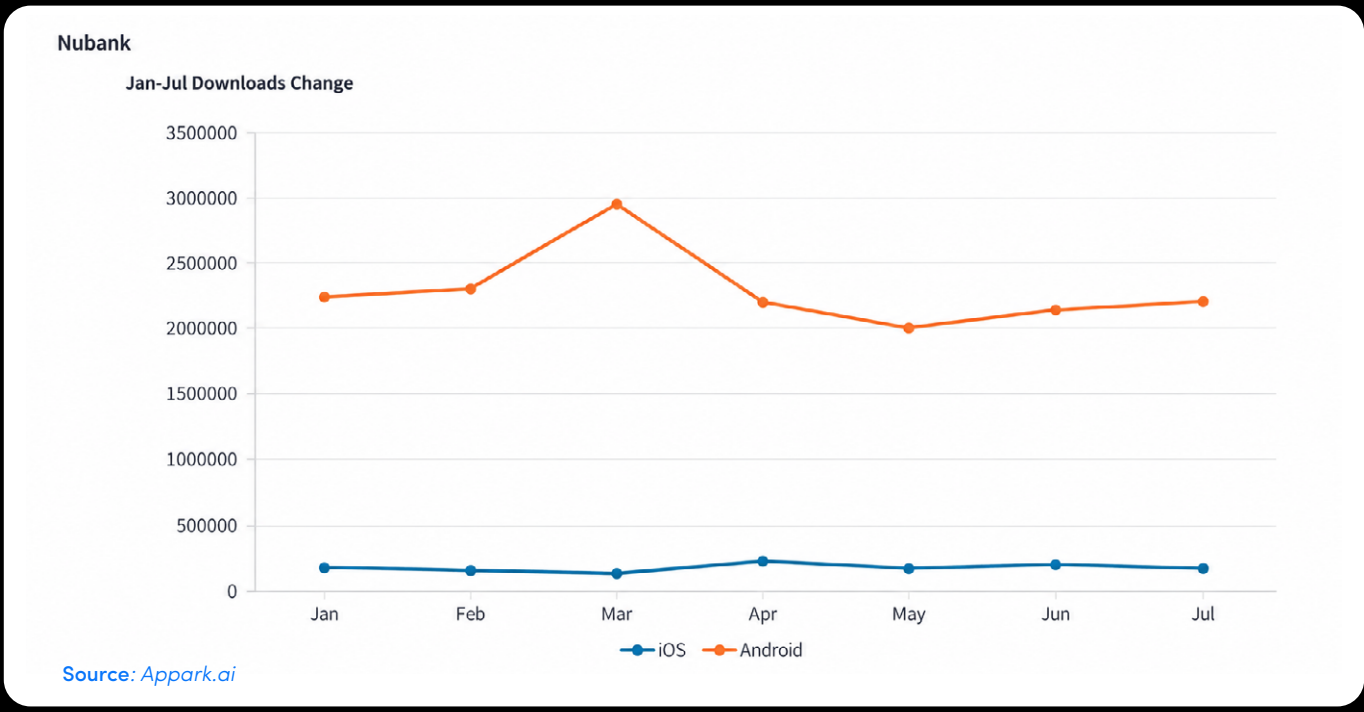


Source: *BigSpy*

- Apart from a brief correction in March, ad volume on both platforms rose month by month and peaked in June. Leading financial platforms have been consistently increasing their acquisition investment, reflecting steadily rising competitive intensity in Brazil's fintech vertical, characterized by sustained and normalized spending.
- Android has remained the core channel for ad spend, while iOS has achieved rapid growth in parallel, with the gap between the two platforms holding steady. This shows that leading players are covering both mass-market and high-end users, competing for market share across all channels.



Jan–Jul Download Trend



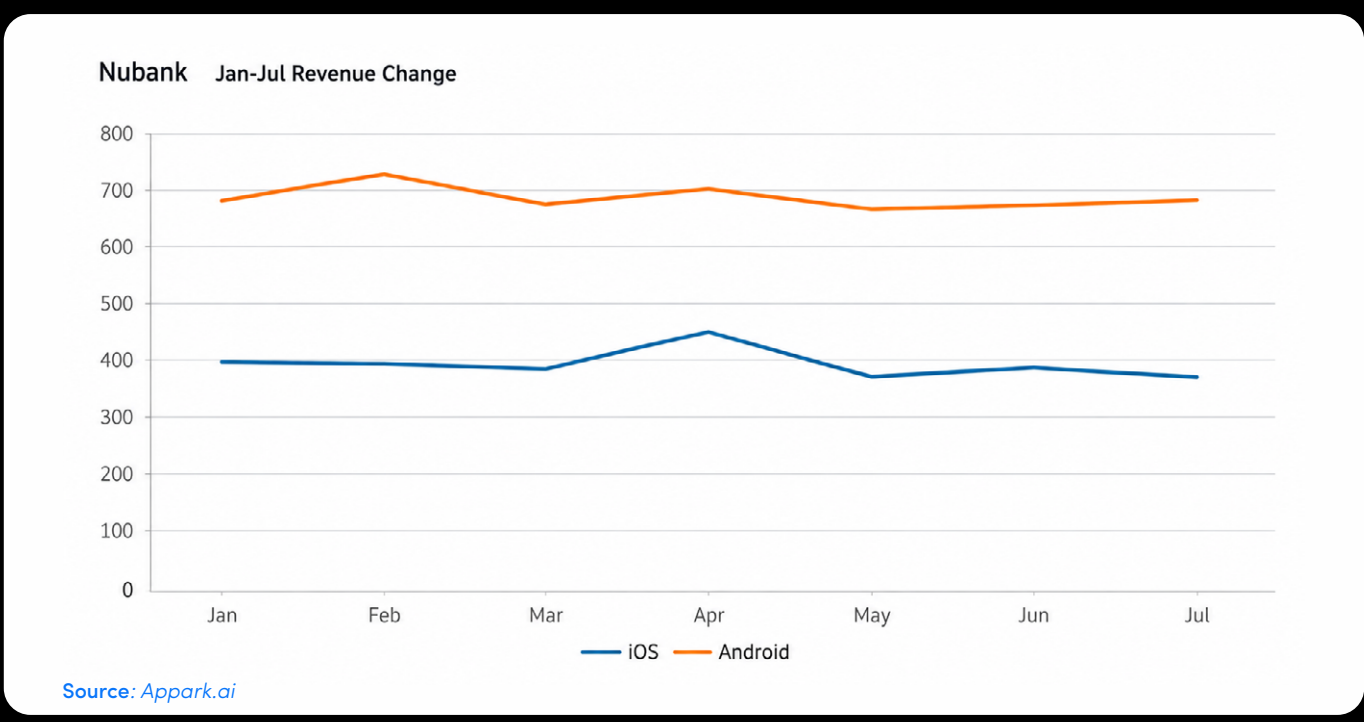
- Android dominates acquisition, fitting the local market structure

Android downloads far exceed iOS as the absolute majority of new users; after a concentrated March peak they eased back. Nubank focuses acquisition on Brazil's mainstream Android masses, matching the local market.

- A clear pulsed acquisition rhythm; steady operations

Downloads show 'spike at nodes, steady otherwise'—the March peak maps to concentrated marketing, then mild growth resumes, using phased bursts plus daily retention to avoid constant high-cost spend.

Jan–Jul Revenue Trend



- Stable dual-platform revenue tiers; Android is the revenue pillar

Android revenue led iOS throughout, mirroring its user base; Android mass users are the revenue foundation, with monetization aligned to user structure on both platforms.

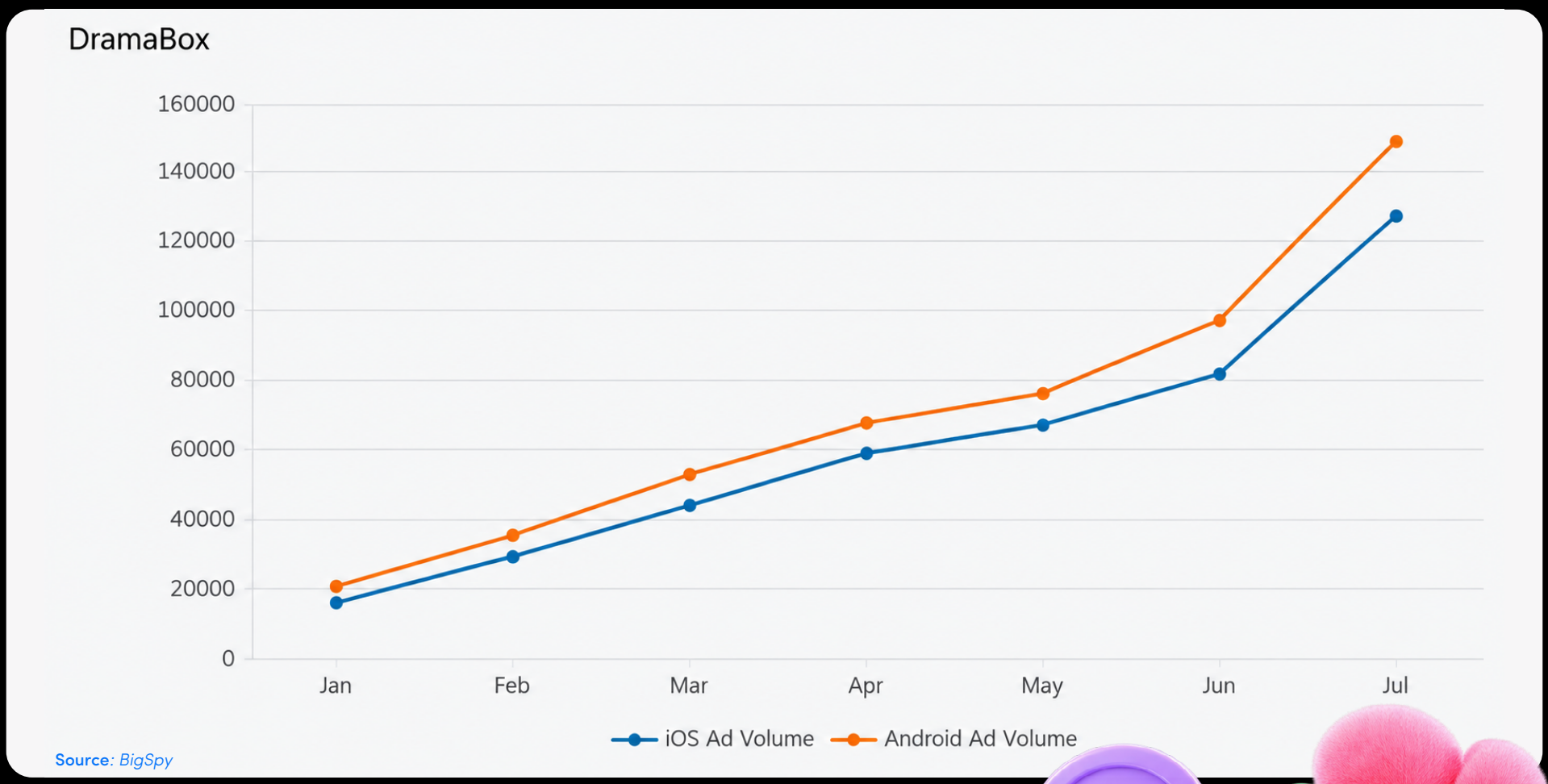
- Revenue resilience beats downloads; the stock-monetization base is solid

Versus download swings, revenue stayed smooth with much smaller volatility; new-traffic fluctuations barely hit revenue, reflecting stable fintech retention and a mature stock-monetization system.

Emerging Short-Form Drama Vertical: Traffic Dividends Fade Fast as Growth Shifts to Mining Existing Users and High-Value Monetization — DramaBox

Short drama is Brazil's fastest-growing content format in recent years, with user growth and monetization validating far ahead of expectations. Brazil is the world's #3 and Latin America's #1 short-drama download market, led by DramaBox, ReelShort and GoodShort, while local media groups are also moving in.

Jan–Jul Ad Volume

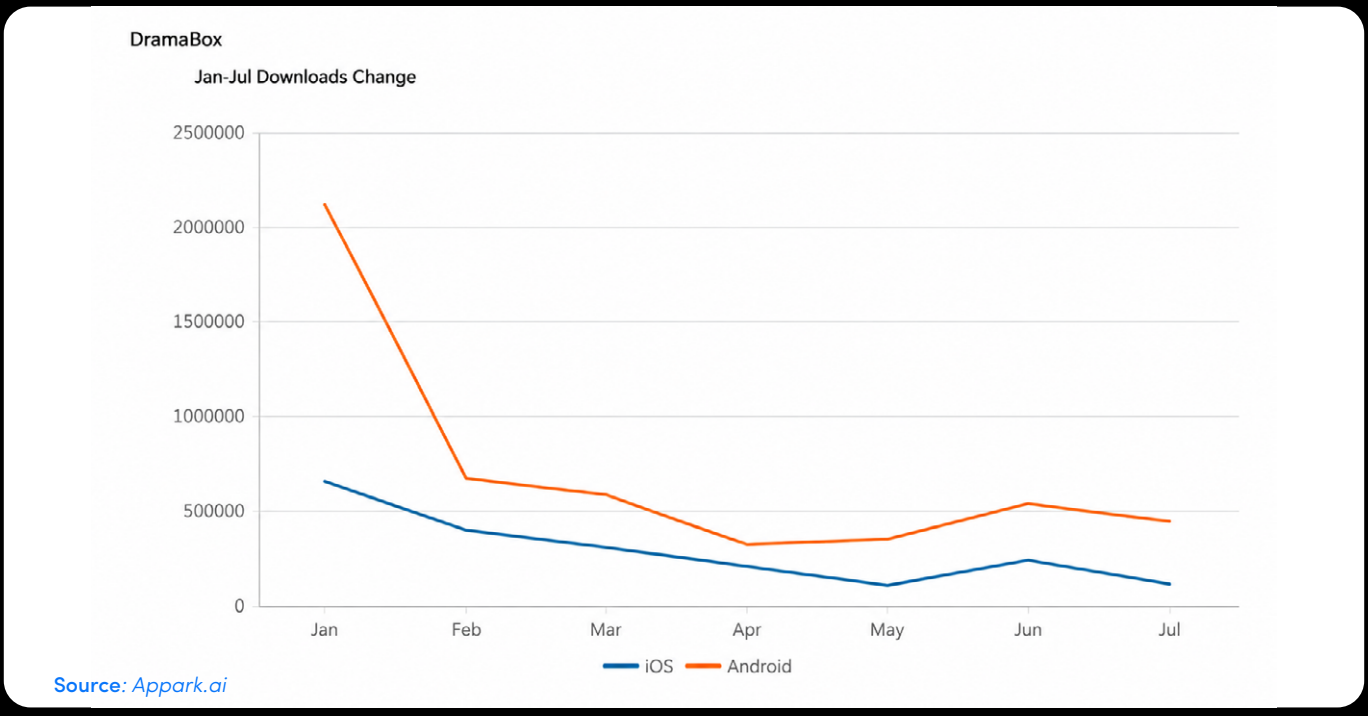


Source: *BigSpy*

- Dual-platform spend rose every month, several-fold larger in July than January; Brazil's short-drama track is in a high-growth sweet spot as top players keep acquiring and competition intensifies fast.
- Android is the core acquisition ground with leading spend; iOS grows just as fast, so top platforms run both ends to cover mass and mid-to-high-end users across all channels.



Jan–Jul Download Trend



Source: *Appark.ai*

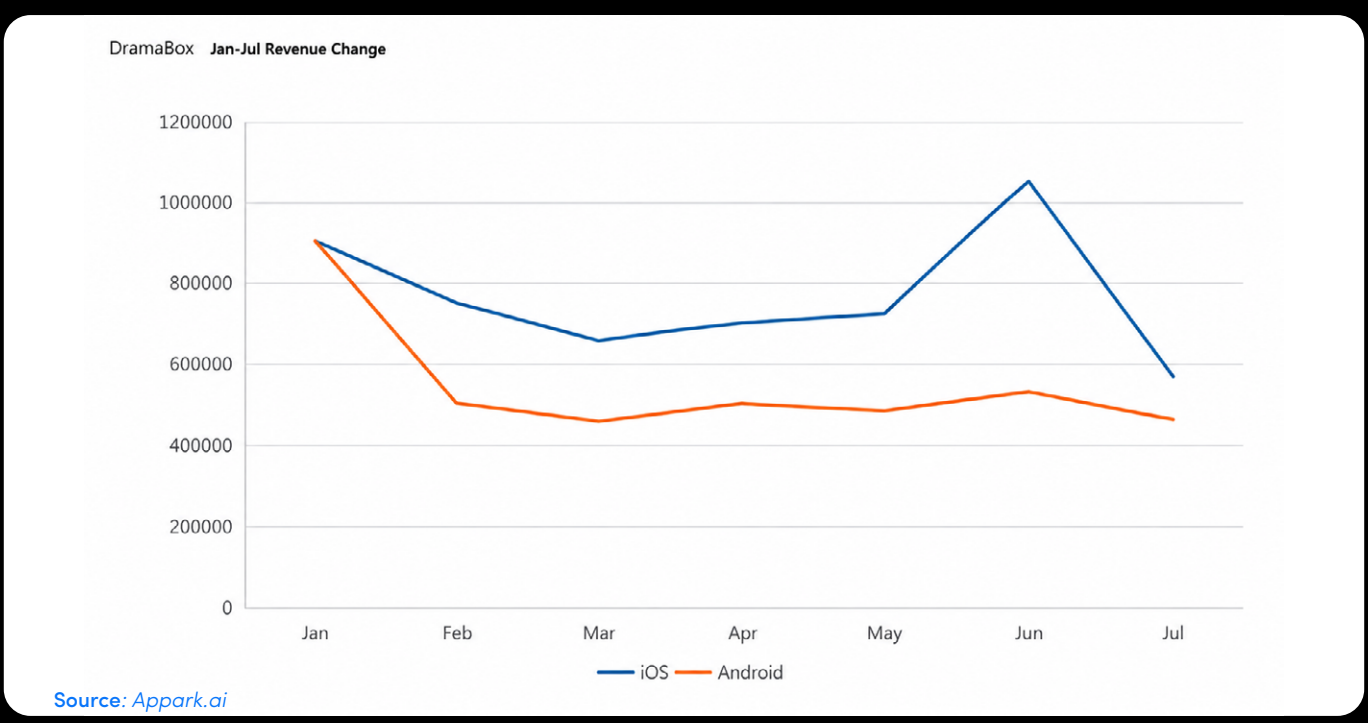
- After an initial burst, downloads keep falling; the incremental dividend shrinks fast

Both platforms peaked in January (Android especially strong), then declined—showing that after concentrated buying, Brazil's new-user space shrank fast and acquisition shifted from pull to stock competition.

- Android is the main acquisition driver, but its paid-growth decay is steeper

Android led downloads throughout as the core new-user ground, but its drop was far steeper than iOS's, meaning the mass-user paid-growth dividend faded faster and acquisition efficiency slipped at the margin.

Jan–Jul Download Trend



Source: *Appark.ai*

- iOS users' value stands out as the core revenue growth pole

iOS revenue spiked in June, given its lower downloads, this proves iOS users pay far more willingly and capably—the high-value core of short-drama monetization.

- Revenue and downloads diverge; stock-monetization efficiency rises

Even as total downloads fell, revenue rose counter-cyclically—showing the growth logic shifting from 'buy users' to 'mine the base', lifting per-user value via content ops and paywall design.

CHAPTER 3

How to Build Scalable App Growth in Brazil



3.1 Market Entry in 2026: How Should App Marketers Prepare?

Brazil market conditions: scale is large, but the bar for entry is rising

Brazil offers huge reach on TikTok, but more advertisers are competing for the same users. The question is not whether users are reachable; it is whether the category, platform mix, and monetization path can support repeatable growth:



131M
TikTok users aged 18+
Potential ad reach in Brazil, late 2025

162K+
Non-gaming TikTok ads
Observed in Brazil, Jan–Jul 2026

+18% YoY
Non-gaming UA investment
$53B globally in 2025

For a new entrant, market size is only the starting point. A large market is not enough reason to launch. Demand, competition, acquisition cost, and post-install value still need to add up.

The readiness framework behind scalable market entry

The three checks are sequential: a promising category is not enough without local fit, and acquisition volume is not enough without a measurable value signal.

1. **Market opportunity** *Compare download and revenue direction with advertiser activity to confirm the category has enough demand and room to compete.*

2. **Local & platform fit** *Test Brazilian Portuguese UX, monetization, and Android/iOS performance separately. Scale first where the numbers work.*

3. **User value & measurement** *Define the first meaningful post-install action, track it reliably, and use that signal to decide whether the campaign is ready to scale.*



Use actual market signals, not a generic opportunity matrix

The same growth rate can mean very different things depending on how crowded the category already is. Current Brazil data illustrates three different entry conditions:

Observed signal	What it suggests	Entry implication
Shopping: +47.05% App Store download growth; 19K TikTok ads observed	Strong demand with heavy creative activity	Test, but expect differentiation and creative volume to matter early.
Entertainment: +19.05% App Store growth; 87K TikTok ads observed	Large category with very dense advertising activity	Enter only with a clear product and creative angle; generic positioning is unlikely to be enough.
Comics: +49.54% Google Play growth; lower advertiser base in partner market view	Fast download growth with less developed advertiser competition	Validate monetization and retention before treating lower competition as a white-space opportunity.

Source: *Appark.ai, BigSpy*

Brazil-specific checks can change the launch plan

Two local realities are especially useful when deciding platform and monetization priorities:

77.5% Android share



Android dominates mobile and tablet OS usage in Brazil, making platform-level performance an important part of launch planning.

170M+ Pix users



Pix is already a mainstream payment method in Brazil, making local payment behavior relevant to app conversion and monetization.

Platform economics



Android is the larger mobile OS base, but scale and monetization should still be reported separately by platform before budget is shifted.

Payment fit



If the app handles payments, test local payment behavior across the user journey. Don't treat it as a checkout-only detail.

Localization



Brazilian Portuguese should cover store listing, onboarding, pricing, trial terms, support, and the first value moment — not only ad copy.

Turn the first market test into four decisions

The first test should answer questions that change what the team does next:

01

Can acquisition reach the first meaningful event at a viable cost?
If installs are cheap but activation is weak, fix the proposition or onboarding before adding budget.

02

Which platform has stronger economics?
Compare acquisition cost, activation, and monetization together; do not select Android or iOS on install volume alone.

03

Does the early event predict deeper value?
A cheap registration or trial is not enough if those users rarely subscribe, purchase, transact, or generate revenue.

04

Does performance hold when budget increases?
Scale in controlled steps and watch whether acquisition cost and downstream value remain inside an acceptable range.

A four-stage roadmap for entering and scaling in Brazil

Use each stage as a gate. Move forward only when the previous stage has produced enough evidence to support the next decision:



STAGE 01
VALIDATE

Confirm category, target user, positioning, and platform hypothesis

Move on when the market thesis is clear.

STAGE 02
PREPARE

Localize the product, define the value path, and set key events.

Move on when acquisition can be connected to the first meaningful value event.

STAGE 03
TEST

Compare acquisition cost, activation, platform economics, and early monetization.

Move on when performance remains stable in a larger test.

STAGE 04
SCALE

Increase budget gradually, expand creative, and deepen optimization.

Continue scaling while unit economics remain acceptable.

3.2
TikTok Creative Trends Shaping User Acquisition

Drawing on Mega Digital's app advertising experience and Brazil-focused market intelligence from BigSpy, TikTok creative in 2026 is becoming increasingly category-specific. Story-led apps, functional tools, creator-led products, and shopping platforms are not competing with the same creative language; each category is adapting how it earns attention to the way the product is experienced.

For app marketers, this makes creative strategy less about following the most visible format and more about choosing the right way to demonstrate value. The challenge is to identify which creative structure fits the product, localize it for Brazilian audiences, and keep learning through testing and refresh cycles.



Mega Digital report

This section combines Brazil-focused creative intelligence from BigSpy with Mega Digital's app advertising experience and external platform benchmarks. BigSpy estimated impressions, duration, and re-delivery are used to identify recurring patterns and large-scale delivery. External benchmarks are labeled when they are global rather than Brazil-specific.

1 Storytelling goes longer when the story earns attention

Short-form remains useful, but the Brazil sample shows that story-led apps can sustain much longer delivery when the story is the product experience. Dola examples run from 1m54s to 2m35s, while short-drama advertisers use both 18-40 second climax hooks and full episodes lasting several minutes.

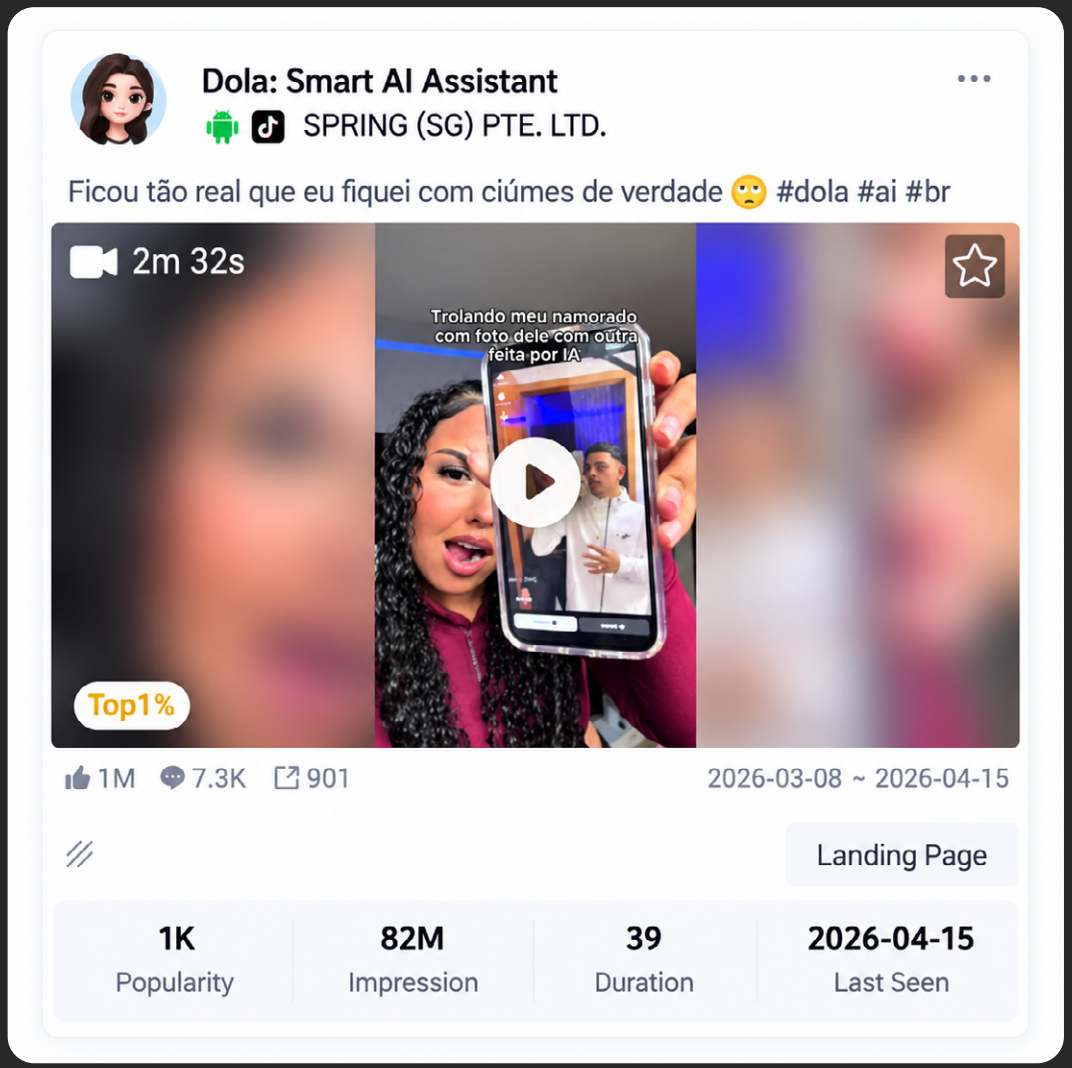


1 Story angle:
Jealousy over a "virtual boyfriend" and GRWM-style relationship situations.

2 Execution:
Selfie UGC in Brazilian Portuguese, with Dola shown naturally on the creator's phone.

3 Scaling pattern:
Serialized variations such as "pt135," with observed creatives reaching 24M - 82M estimated impressions.

Scan to watchthe video
Dola · TikTok Brazil



Dola does not lead with an AI feature demo. The creative behaves like creator content: a Brazilian Portuguese selfie story, an everyday relationship or lifestyle tension, and the app appearing naturally on the phone. Selected Dola assets reached 24M–82M estimated impressions and ran for 23–39 days.

The takeaway is not "long video wins." The stronger signal is that length is becoming more flexible when the idea keeps giving the viewer a reason to stay. A utility app may prove its value in seconds. An AI companion or drama app may need more time because the story itself is what creates interest.

TikTok's own creative guidance still makes the opening critical: the platform reports that 90% of ad-recall impact is captured within the first six seconds. In practice, the hook earns the next few seconds; the rest of the creative has to keep earning attention.



Mega Digital Takeaway

Do not start the brief with "How long should this video be?" Start with "How quickly can we make this app relevant, and how much time does the idea need to prove its value?". For UA, this gives story-led apps more room to build interest before the install while keeping the opening focused on earning attention quickly.

2 Creator-led content makes the app feel more real

Creator-led content is appearing across several non-gaming app categories in Brazil, but its role changes depending on the product. Rather than simply endorsing an app, creators help turn features into situations, outcomes, and experiences that feel easier to understand and more relevant to everyday use.

Fintech advertisers often use talking-head videos, street settings, and everyday situations to communicate financial value in a more familiar way.

Creator ads feel more native in-feed when they use direct-to-camera delivery, everyday settings, quick hooks, captions, and visible product use instead of a polished spokesperson format.



1 **Hook:**
Opens with an unexpected expense and the creator saying her account is empty, creating an immediate financial pain point.

2 **Product reveal:**
Around 16s, Nubank introduces the solution “transforme seu limite em saldo”, turning card limit into available account balance.

3 **Product proof:**
The video then shows the actual in-app flow, including entering the amount and selecting how to pay it back in installments.

Scan to watchthe video
Nu · TikTok · App

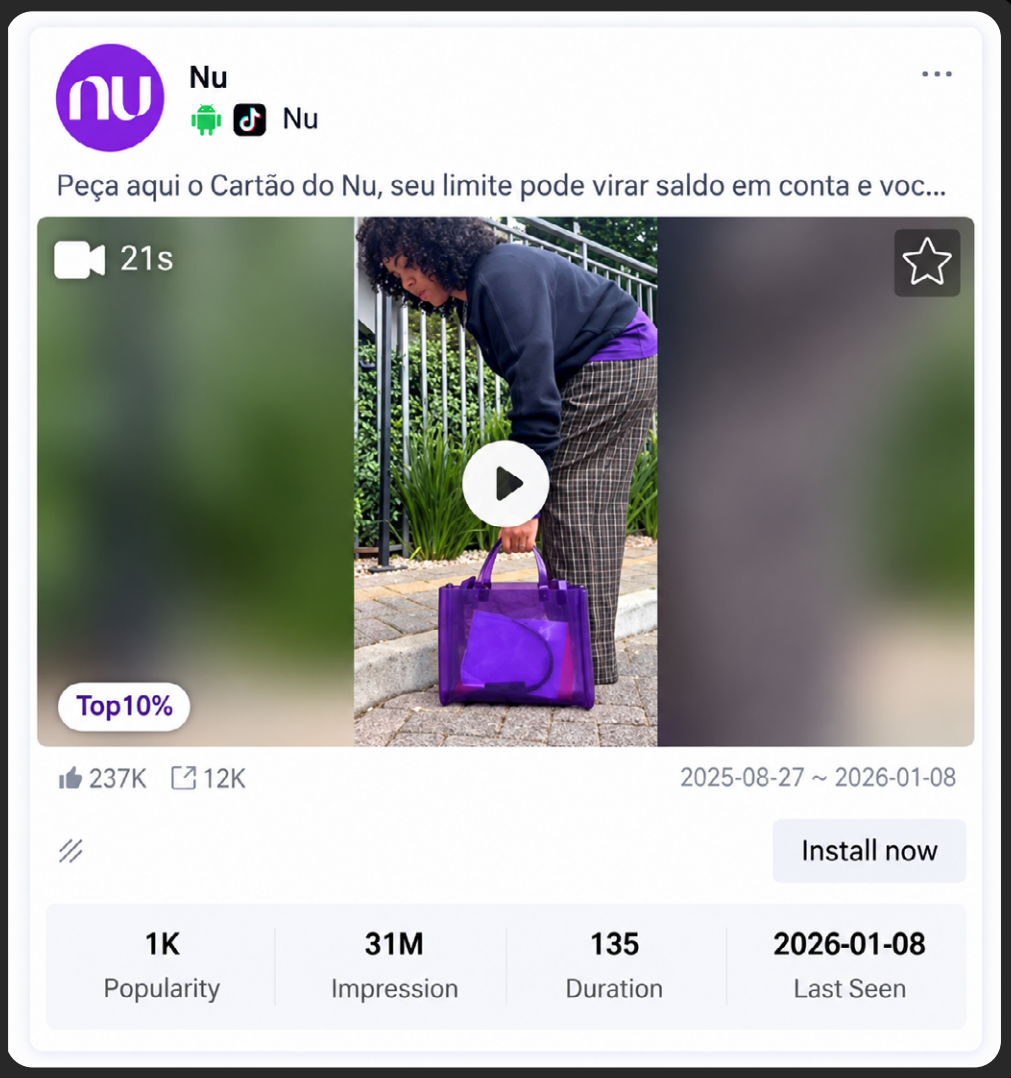


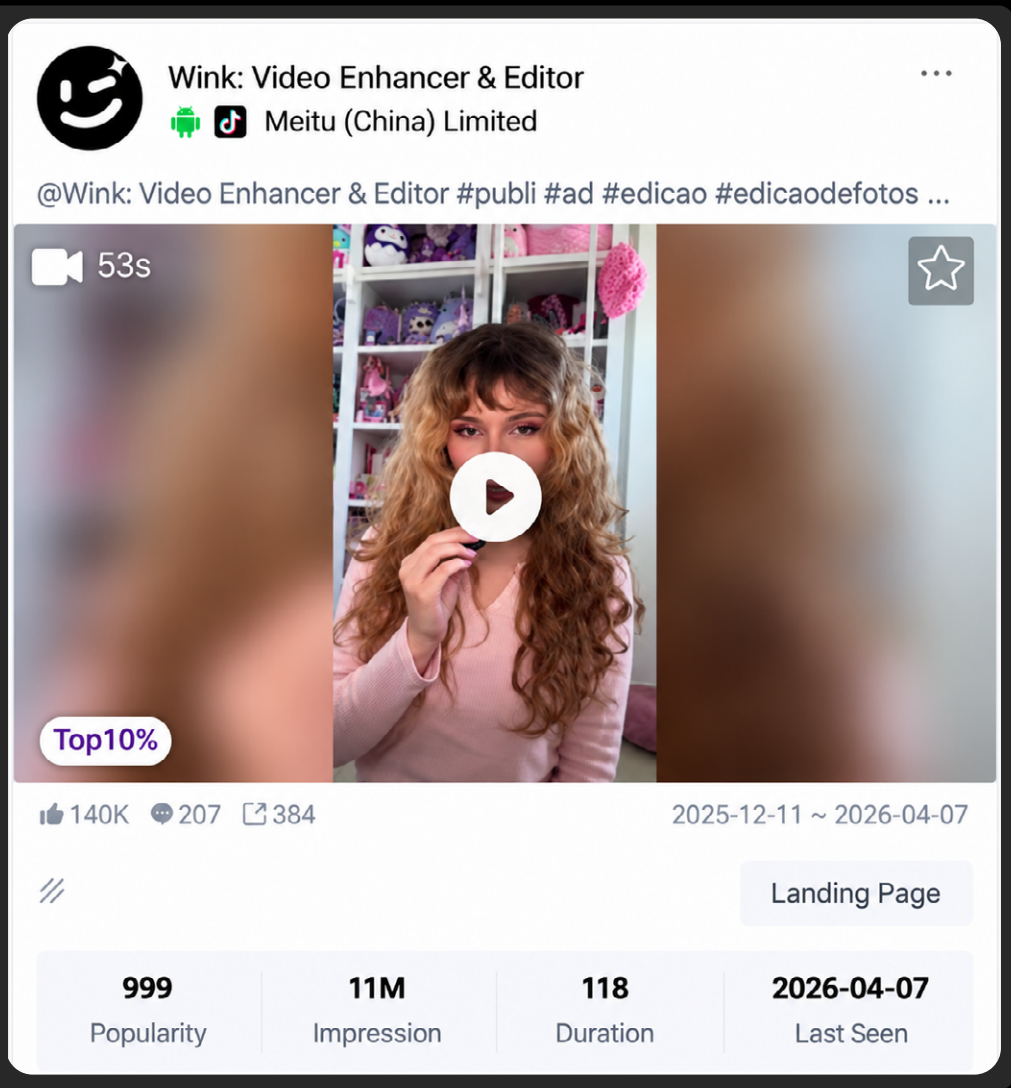
Photo and video apps such as Wink rely more on visual proof. Creators show the editing process or transformation directly on their devices, allowing the before-and-after result to demonstrate the product’s value without requiring lengthy explanation.

1 **Hook:**
Uses the visual transformation itself as the attention grabber rather than explaining editing features.

2 **Product proof:**
Combines a creator with an on-device before/after edit, so viewers can see both the starting image and the improved result.

3 **Creator execution:**
The sponsored nature is explicit through tags such as #publi / #ad, while the content still follows a native creator format.

Scan to watchthe video
Wink · TikTok · App



For Mega Digital, creator-led content works best when the brief starts with a user situation and an outcome, not a feature checklist. That gives UA teams more angles to test - different hooks, creators, problems, proof points, and calls to action - before deciding which messages deserve more spend.

3 Product proof moves to the front of the ad

Another clear Brazil pattern is direct product proof. Fintech, utility, education, and editing apps often show the interface, the action, or the result inside the creative. Instead of asking users to imagine the benefit, the ad lets them see it before the install.

Screen recordings are especially common when the value is functional: showing a transaction flow, casting a phone to a TV, cleaning a device, translating text, or playing a learning app. Photo and video tools use a similar principle with before-and-after transformations.

One observed Learn Piano creative used a 17-second screen recording of the app experience and reached about 19 million impressions. The point is not that every education app should copy this exact execution. The broader lesson is that a simple demonstration can reduce uncertainty when the product is easy to understand by watching it work.



1 Hook:
Opens directly on the piano interface, with fingers tapping along to “Jamal Kudu.”

2 Product proof:
The full 17-second ad is essentially a screen-recorded gameplay-style demo, showing how users learn by playing along.

3 CTA & signal:
Ends with a direct Install CTA; the observed creative reached about 19M estimated impressions.

Scan to watchthe video
Piano Keyboard · TikTok · App



Mega Digital Takeaway

A good app creative should answer one practical question early: “What changes for me after I download this?” In some categories, a creator is the best proof. In others, the interface or the result is more convincing. Clear product proof can also reduce uncertainty before the install, helping UA teams attract users who already understand the app’s core value.

4 Localization goes beyond Portuguese

Brazilian Portuguese is only the starting point. Strong localization makes the creative feel native to the market, not simply translated for it.

LANGUAGE
Brazilian Portuguese voiceover, captions, interface and CTA.

CONTEXT
Local situations, problems and use cases that feel familiar.

CULTURE
Creator style, humor, seasonal moments and locally relevant references.

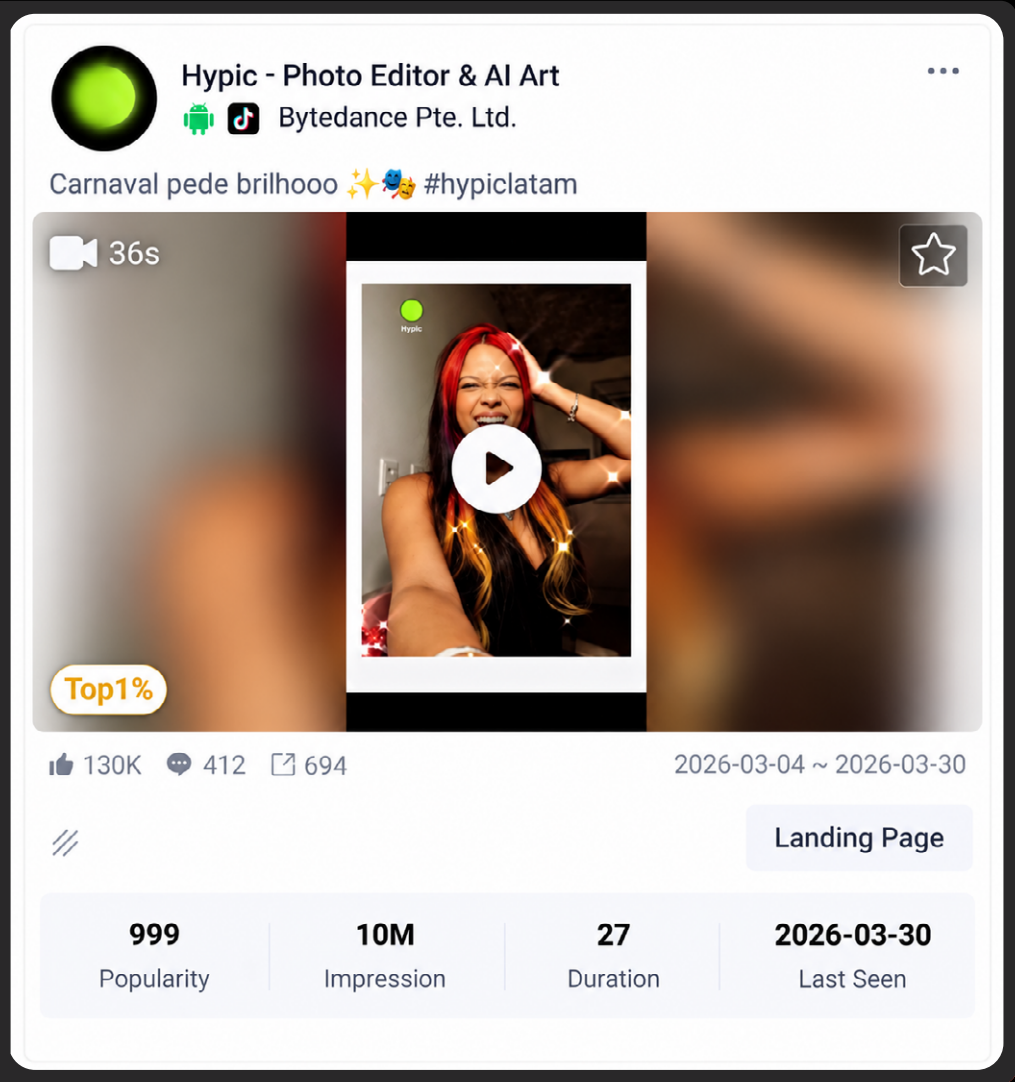
BigSpy examples show AI companion ads built around familiar relationship and family situations, while photo-editing ads use seasonal moments such as Carnaval to make transformations feel timely and local. Fintech creative often uses conversational language and everyday settings rather than relying only on global product footage.

1 Hook:
Leads with the finished photo effect, then shows how the image is transformed inside the app.

2 Creative angle:
Adapts editing ideas to specific moments such as Carnaval ("Carnaval pede brilhooo"), end-of-year "diva" photos, and couple content.

3 Localization:
The product stays global, but the use case, Portuguese copy, and seasonal moment make the creative feel specifically Brazilian.

Scan to watchthe video
BigSpy · TikTok · App



This is also a better way to test market entry. A global concept can stay the same while the Brazilian execution changes. That helps teams separate a weak idea from weak localization instead of rebuilding every campaign from zero. This also gives UA teams a cleaner read on whether the concept itself resonates with Brazilian users.

5 Creative scale comes from repeatable testing, not one winning ad

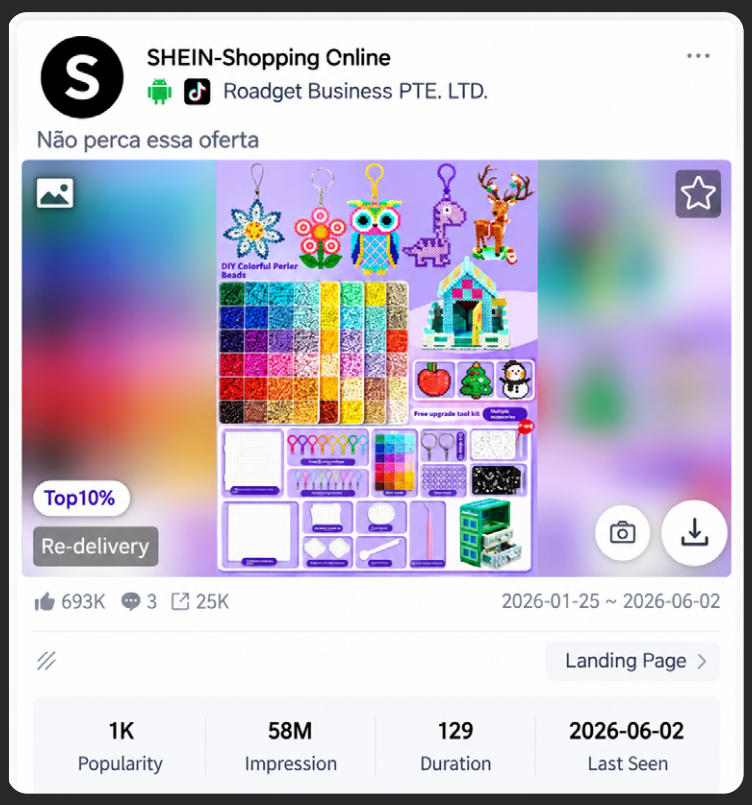
The Brazil data also shows that advertisers maintain and refresh creative in very different ways. AI companion and short-drama advertisers build series around recurring stories or numbered episodes. Shopping advertisers can keep simple product-led assets in rotation for much longer. In the BigSpy sample, some SHEIN creatives remained active for roughly 48 to 129 days, with observed examples around 57 - 58 million impressions.



1 Hook:
Shows the merchandise immediately - either a model against a simple studio background or a colorful flat-lay of multiple SKUs.

2 Execution:
Uses very short Portuguese offer/style copy such as “Não perca essa oferta” across many product-image variations.

3 Scaling pattern:
Selected static creatives stayed active for 48–129 days and reached around 57-58M estimated impressions, showing a high-volume variation and re-delivery model.



This sits inside a broader shift in app marketing. AppsFlyer found that high-spending non-gaming apps increased creative output by 18% year over year and averaged 2,365 creative variations per quarter. At the same time, the top 2% of non-gaming creatives still accounted for 43% of ad spend. In other wordBrazil gives app marketers access to one of TikTok’s largest addressable audiences, but that scale now sits inside a denser acquisition market. s, teams are producing more variations, but they are still putting meaningful budget behind the strongest ideas.

TikTok testing is more useful when each variation isolates a clear change. Rotate the opening frame, hook, creator, text overlay, product proof, or CTA while keeping the core idea stable enough to learn from the result.



For Mega Digital, the important shift is from “find one winner” to “build a learning rhythm.” A useful variation changes something that can teach the team: the hook, the user tension, the creator, the product proof, the local context, or the CTA. Small cosmetic edits may create more files without creating much more learning. A repeatable testing rhythm also helps UA teams turn campaign results into clearer scale, refresh, or stop decisions.

Category playbook: match the mechanism to the product

Across non-gaming app categories, there is no universally “best” TikTok creative format. The right approach depends on how each app captures attention, demonstrates value, and moves users toward install or conversion.

Category	Primary creative job	Observed mechanism	Testing priority
AI Companion	Make the product emotionally real	Selfie story / serialized scenario	Hook + story tension + product insertion
Short Drama	Create immediate narrative demand	18–40s climax hook or full episode	Hook angle + episode depth + offer
Fintech	Build trust or prove financial value	Screen proof / talking head / local setting	Proof point + creator role + compliance
Photo & Video	Show transformation	Before/after + on-device demo	Result-first opening + seasonal angle
Utilities & Education	Reduce uncertainty	Direct screen demo	Problem-action-result sequence
Shopping	Sell assortment or offer	Static product grids + re-delivery	SKU + offer + copy breadth
Social & Voice	Trigger identity or reaction	Short reaction + niche-community hook	Community angle + creator expression
Parental / Health	Frame a sensitive problem	POV skit + text overlay / W2A	Scenario + trust + pre-install explanation

From more content to better creative decisions

Across these patterns, the common lesson is simple: TikTok creative in Brazil needs to fit the product, not a universal formula. Competitive intelligence can reveal which formats and ideas are receiving large-scale delivery, but those signals are only a starting point. App marketers still need to turn them into hypotheses, test them with their own audience, and use campaign performance to decide what to scale, refresh, or stop.

KEY TAKEAWAYS FOR APP MARKETERS



Hook early
Make the value clear fast, then let the idea decide the length.

Match format to value
Use story, creator, product proof or repetition based on what the app needs to sell.

Localize the context
Adapt situations and delivery, not only the language.

Build a refresh rhythm
Plan variations and replacement assets before the current winner

3.3 TikTok Media Buying Strategies for Higher-Value Conversions

Why optimizing for installs is no longer enough

For years, app user acquisition has been measured mainly by install volume and CPI. But low-cost installs do not always translate into users who register, subscribe, purchase, or generate meaningful revenue.

As competition increases, advertisers need to optimize beyond the install. On TikTok, this means progressing from Install Optimization to App Event Optimization (AEO) and, when sufficient value data is available, Value-Based Optimization (VBO).



The recommendations below combine TikTok guidance with the campaign checks **Mega Digital** *uses in practice. Treat the numbers as starting points, then adjust them to event volume, payback time, and business risk.*

From:

~~**“How cheaply can we acquire an install?”**~~

To:

“Which optimization signal best represents the value we want to scale?”

Build a launch structure you can actually learn

01

Campaign:

Keep one primary optimization goal per campaign. Separate Android and iOS only when budgets, monetization, or downstream economics need to be read independently.

02

Ad groups:

Start with 2 - 3 ad groups around clear targeting hypotheses, typically broad as the control, plus one or two justified audience tests. Keep the bid strategy and optimization event consistent during the first read.

03

Creative:

Launch 4 - 6 materially different videos per ad group. Change the hook, creator, proof point, or story angle, not just captions, colors, or music.

04

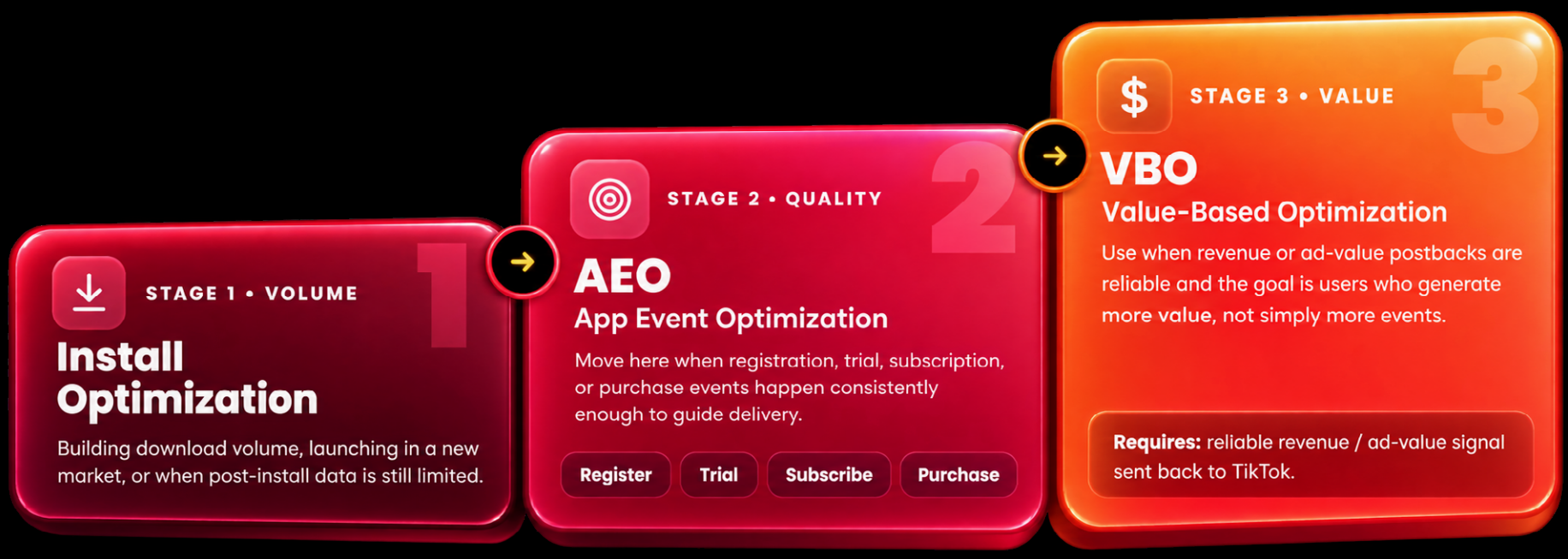
Scale:

Once one setup is clearly stronger, expand budget and creative around it. Avoid changing targeting, bid, budget, and creative in the same 24 - 48 hour window; otherwise the team cannot tell what caused the result.



Choose the Right Optimization Goal

The most advanced optimization option is not always the best place to start. The better choice is the deepest business event that matters to you and still happens often enough for TikTok to learn from it.



Do not move deeper in the funnel just because a platform threshold has been reached. Move deeper only when the event is frequent enough and still predicts the next value step.

For subscription apps, Trial or Subscribe can be a better step before Purchase when purchase volume is too sparse. As a practical guardrail, if Trial-to-Paid CVR drops by roughly 10-15% versus the control, a cheaper Trial CPA is not enough reason to scale; review the event choice before adding budget.



Give the campaign enough time to learn

Platform learning thresholds are useful reference points, not universal pass/fail rules. Before the next move, look for stable delivery, CPA, and downstream quality.

Protect the learning phase

- As a practical baseline, give a new ad group about **5-7 days** unless tracking is broken or the campaign breaches a hard cost or quality guardrail.
- Avoid repeated bid, budget, and targeting changes during the same learning window. Change one major variable at a time so the next read is interpretable.
- Treat conversion volume as context, not a finish line. Reaching around 50 conversions with weak Trial-to-Paid, payer quality, or revenue is not a scale signal.

Set enough budget and creative supply

- Set enough budget to generate a useful sample of the target event. If the event cannot occur regularly at the available budget, optimize a shallower event first instead of forcing a deeper objective.
- Start with 4-6 materially different videos rather than many cosmetic variants.
- When delivery starts concentrating or creative fatigue appears, add 2-3 new concepts in parallel. Do not replace an asset only because CTR softens if CPA and downstream value are still stable.

Scale only after performance becomes clearer

- Set **Target ROAS and cost guardrails** from recent campaign economics, not an aspirational benchmark.
- **Review several days or cohorts** instead of reacting to one-day swings, especially when subscription or purchase value arrives late.
- **A reasonable scaling range is 15-30%** per budget increase, then hold for **24-48 hours** before the next change. Use smaller steps when event volume is thin or revenue is delayed.

Match bidding and targeting to your campaign goal

Once your campaign goal is clear, match your bidding and targeting setup to that objective so you can scale conversions without losing control of cost or user value.

1 For more conversions

Challenge: The campaign needs more conversion volume and room to scale.

Recommendation

1. **Use Maximum Delivery** to prioritize conversion volume within the available budget.
2. **Keep targeting relatively broad** so TikTok has more users to evaluate.
3. **Avoid adding unnecessary audience restrictions** unless they are required by the product or market.

2 For better cost control

Challenge: Conversion volume is available, but CPA becomes less predictable as the campaign scales.

Recommendation

1. **Use Cost Cap** when maintaining CPA closer to a target is more important than maximizing volume.
2. **Set the target** based on recent campaign performance rather than an overly aggressive benchmark.
3. **Give the campaign enough room to learn** before making frequent bid adjustments.

3 For higher-value users

Challenge: More conversions do not necessarily lead to more revenue.

Recommendation

1. **Move to VBO – Highest Value** when the priority is maximizing total purchase or ad-revenue value.
2. **Use VBO – Target ROAS** when the campaign needs stronger control over return.
3. **Keep targeting broad enough** for TikTok to identify users with higher expected value instead of manually narrowing the audience too early.

TikTok benchmark: TikTok reports that fairly broad audiences - reaching more than 80% of potential users in a country - averaged **15% lower CPA** and **20% higher conversion rates** than narrower audiences.

- **Use the TikTok benchmark as a reference point, not a rule**. Broad targeting is a useful control only while CPA and downstream quality hold; narrow only when compliance, product eligibility, or a proven audience hypothesis justifies it.
- **Allocate by economics, not CPI**. If Android is 40% cheaper on CPI but payer LTV is 55% lower, compare payer CAC, payback, and LTV:CAC before shifting more budget to Android.
- **Choose the bid strategy for the problem you are trying to solve**. Maximum Delivery is for volume; Cost Cap is for tighter cost control; VBO makes sense when value data is reliable enough to distinguish a cheap conversion from a valuable user.

Smart+ in 2026: automation with more control

Smart+ can reduce setup and delivery work, but it should not replace the media-buying decisions above. Use more automation when event signals are clean, creative supply is sufficient, and the system has room to explore.

- **Use more automation** when the optimization goal, event mapping, and business guardrails are already clear.
- **Keep more manual control** when testing one variable, applying strict audience or compliance rules, or when automation improves platform metrics but weakens downstream economics.
- **Compare Smart+ and manual on the same business KPI** such as payer CAC, subscription revenue, orROAS - not setup time or conversion volume alone.

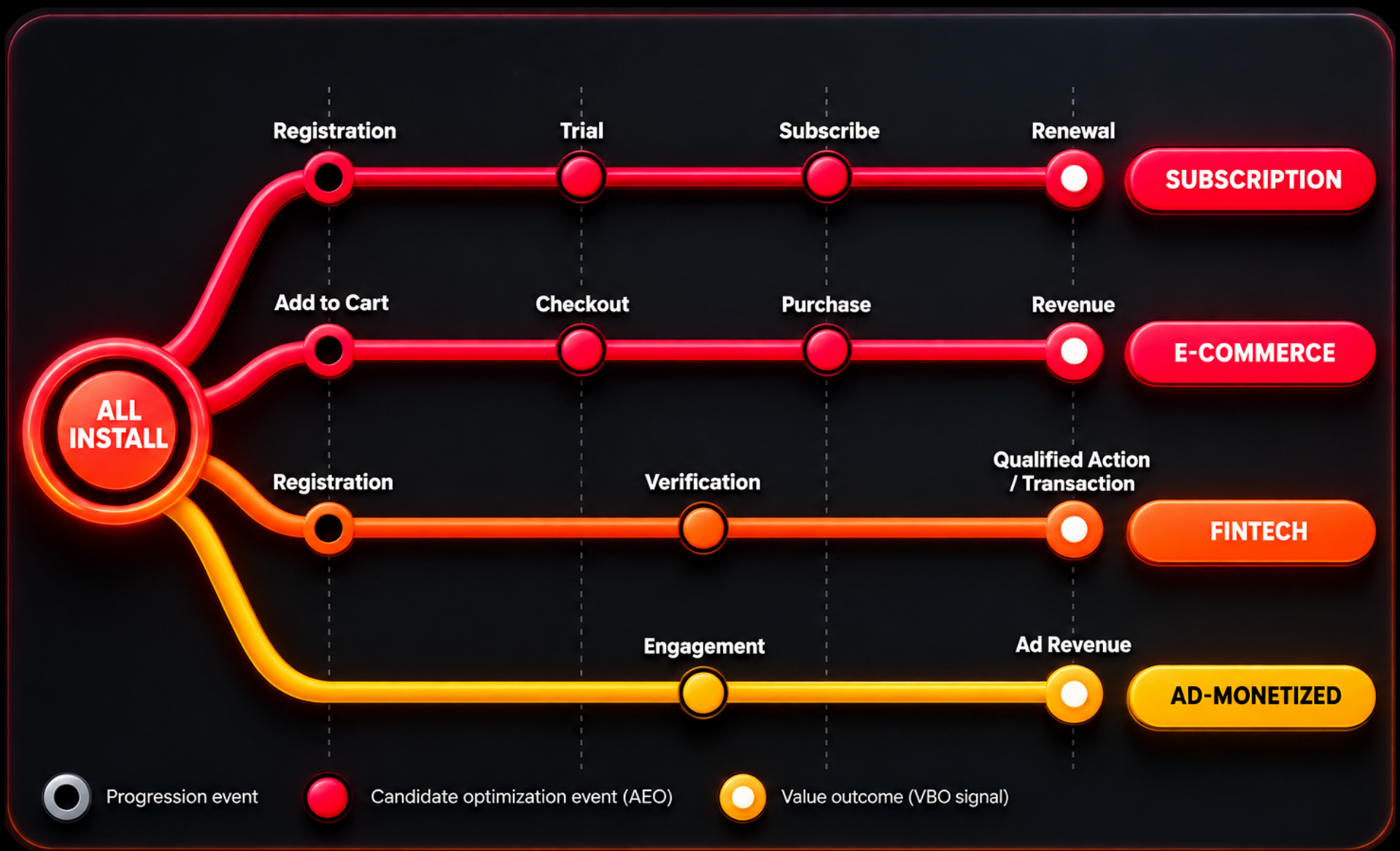


Better optimization starts with better tracking

Tracking is useful only when it changes a media-buying decision. For Brazil campaigns, the minimum standard is to connect acquisition to the first meaningful action and, where relevant, to revenue or ad value.

Build a signal map before launch

Map the few events that represent real progression, then decide which one is stable enough to optimize:



Do not promote every event to an optimization KPI. Pick the event that is meaningful, measurable, and frequent enough - then verify that it predicts deeper value.

Run tracking QA before you scale

Use an MMP, TikTok App Events SDK, or a hybrid setup. What matters here is whether event and value data are clean enough to guide budget decisions.

Value data

revenue and **currency** are present when optimizing to purchase value.

Event mapping

the app, MMP, and **TikTok** agree on what each event means.

Data quality

missing, duplicate, or **misclassified events** are fixed before budget increases.

A high-volume event is useful only if it still predicts deeper value. Clean tracking should make a media-buying decision clearer - not add another dashboard to monitor.

What good tracking looks like in practice

Before scaling, look for three things: complete signals, correct mapping, and enough stable event volume. TikTok and the MMP do not need exact parity, but they should point in the same performance direction.



What this changes for Brazil campaigns

1

Use post-install quality to separate campaigns that create installs from campaigns that create registrations, subscriptions, transactions, purchases, or revenue.

2

Keep Android and iOS measurement views separate; a larger Android base does not mean both platforms should share the same CAC, activation, or monetization threshold.

3

For subscription and transaction models, evaluate delayed value and repeat behavior before treating an early-event winner as the revenue winner.



Case Study:

How Successful Apps Scale with TikTok

Dafiti

Category	Market	Channel	Tool
Fashion e-commerce	**Brazil**	**App · TikTok Ads**	**Symphony Creative Studio**

SUCCESS STORY

Dafiti is one of Brazil's largest online fashion retailers, with its app as an important sales channel. Its TikTok case makes a simple point: creative scale only matters when new formats can prove they drive more orders and better returns.

CHALLENGE

- Improve conversion from its always-on app campaigns.
- Find out whether animated video could beat its existing static and product-video assets.
- Make the winning format easy to produce at scale.

SOLUTION

- Turned existing product photos into animated videos with TikTok Symphony Creative Studio.
- Ran an A/B test against static images and conventional product videos in TikTok Ads Manager.
- Judged the test on app sales, orders and ROI - not creative engagement alone.

RESULTS

- Sales increased by 201% with Symphony-generated videos.
- Orders in the Dafiti app grew by 235%.
- ROI improved by 205% versus the comparison assets.



** Past performance does not guarantee or predict future results.*

RD Saúde

Category	Market	Channel	Tool
Pharmacy retail · Raia & Drogasil	**Brazil**	**App · Always-on**	**Smart+ Catalog Ads**

SUCCESS STORY

RD Saúde, the group behind Raia and Drogasil, uses its apps for purchases, coupons, store pickup and repeat orders. This case shows how automation works better when it is supported by clean product data and clear reasons to buy in the app.

CHALLENGE

- Increase TikTok spend while keeping ROAS above 25.
- Improve product matching so the account could scale more predictably.
- Give users clearer reasons to complete purchases in the app.

SOLUTION

- Made Smart+ Catalog Ads the default setup across the performance account.
- Fixed product IDs and strengthened catalog signals, more than doubling the match rate.
- Shifted messaging to app benefits such as exclusive coupons, fast delivery and loyalty rewards.
- Used TikTok Partner Exchange to add more native-looking creative.

RESULTS

- Raia's ROAS increased by 173%.
- Drogasil's ROAS increased by 127%.
- Average monthly investment grew 130% for Raia and 158% for Drogasil.
- Smart+ Catalog Ads remained at 100% adoption across the account.

** Reported comparison: average of Sep-Nov 2025 versus Dec 2025-Mar 2026. Past performance does not guarantee or predict future results.*



Natura

Category	Market	Channel	Tool
Beauty · Direct commerce	**Brazil**	**App · TikTok + Pangle**	**Pangle · Monks (agency)**

SUCCESS STORY

Natura, one of Brazil's best-known beauty brands, uses its app as a direct commerce channel. Its case shows how an advertiser can reach beyond the TikTok feed without losing sight of the metric that matters: profitable app sales.

CHALLENGE

- Grow app sales during Black Friday without weakening profitability.
- Find more qualified reach in a highly competitive retail period.
- Add new inventory that could still generate profitable app transactions.

SOLUTION

- Expanded delivery to Pangle with planning and execution by Monks.
- Reused TikTok-native assets from the brand, creators and Natura consultants across the new placements.
- Kept the app as the conversion destination, using Black Friday offers to drive downloads and purchases.

RESULTS

- ROAS efficiency improved by 568% year over year.
- Revenue grew 24x versus the previous year.
- App transactions from TikTok increased 22.6x in 2025 versus 2024.
- Investment rose nearly 7x from Q3 to Q4 while ROAS stayed in double digits.

** Campaign period: October–December 2025. Past performance does not guarantee or predict future results.*



Link video: https://www.tiktok.com/@gipressoto/video/7573401909558512903?

Key Takeaways

The three cases illustrate distinct scaling levers: better creative, stronger signals for automation, and additional ad inventory. Each connects a different campaign change to a business outcome.

Case	Scaling level	What they changed	Business impact	What app marketers can learn
Dafiti	**Creative testing**	Turned product photos into Symphony-generated videos and tested them against static images and conventional product videos.	**+235%** app orders **+205%** ROI versus comparison assets	**Test new formats against existing assets. Scale based on orders and returns.**
RD Saúde	**Signal quality & automation**	Fixed product IDs, improved catalog matching, and adopted Smart+ Catalog Ads with app-focused offers.	ROAS: Raia **+173%**, Drogasil **+127%** monthly investment +130% and +158%	**Improve data quality and the app purchase proposition before expanding automated delivery.**
Natura	**Inventory expansion**	Added Pangle placements, reusing TikTok-native brand and creator assets with Black Friday app offers.	Revenue **24×** App transactions **22.6×** versus the previous year	**Test additional placements with relevant creative and app offers; judge expansion by revenue and return.**

MEGA DIGITAL BigSpy Appark

