

# State of App Growth

## Asia Pacific (APAC) Edition

Survey Report



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# Introduction and Key Findings

## Introduction

Over the past two years, marketers had to rewrite the playbook for app growth. Privacy driven changes like Apple's App Tracking Transparency (ATT), the rise of SKAdNetwork (SKAN), and the decline of third party cookies have made attribution murky and user level insights harder to come by. Marketers now have less visibility into where installs come from, how users engage, and what drives return on investment (ROI).

At the same time, channels have multiplied, user journeys now span platforms, and customer expectations for seamless omni-channel experiences are higher than ever. Yet the technical reality of delivering those experiences and proving their impact remains a challenge. Marketers often underleverage even proven tactics like deep linking in the race for results.

We launched this survey to understand how growth and marketing teams across the Asia-Pacific (APAC) region are navigating these changes in practice. What's working, what's broken, and where are teams placing their bets? The findings offer a grounded view of what it takes to grow in an era defined by signal loss, fragmented data, and shifting user expectations.

Whether you lead performance marketing, lifecycle strategy, or product growth, this report surfaces the shared challenges teams are grappling with, and the creative, resourceful ways they're responding.

## Methodology

We surveyed 250 full-time employees across APAC and Australia. All respondents work at companies with over 500 employees and hold director-level roles or higher in growth, marketing, or product departments. To qualify, we required participants to work at companies where the mobile app represents a significant part of the business and to be directly involved in mobile initiatives.

The sample was distributed across key industries such as finance and retail.

The survey was conducted in May 2025 in collaboration with Global Surveyz, an independent survey company. The results offer a cross-sectional view of how enterprise teams around the world are approaching mobile growth in the current privacy-first landscape.

## Key Findings

### 01 | Only 17% of APAC marketers are very confident in their attribution data.

Attribution remains a work in progress. Just 17% of marketers say they feel very confident in their ability to match installs to the correct source, while 83% report only partial clarity. But recognizing the challenge is the first step toward solving it, and teams are actively exploring new approaches to improve visibility and make more informed decisions.

### 02 | Cost-effective scale is the toughest acquisition challenge.

As acquisition goals grow, marketers are focused on achieving scale without driving up costs. Thirty-six percent say this is their biggest challenge, followed by converting ad clicks into installs (24%) and reaching the right users (23%). These results reflect a shift toward smarter, more efficient growth strategies grounded in performance.

### 03 | Deep linking is a proven tool with untapped potential.

Deep linking is widely used for onboarding (63%) and campaign performance (59%), but its role in retention is still emerging. Only 20% use it to reengage lapsed users, and 3% apply it to referral programs. This gap presents a clear opportunity to extend deep linking's value across the full user journey.

### 04 | Marketers are still working toward a truly unified view of performance.

Only 7% of marketers report having a fully unified view of app performance across channels, while the majority are working with either mostly unified (58%) or partially unified (35%) data. With continued investment in consolidation and collaboration, more teams are laying the groundwork for a connected, crosschannel view.

### 05 | Privacy shifts are sparking smarter measurement strategies.

Privacy regulations are accelerating innovation in attribution and data strategy. Fortyfour percent of marketers say crosschannel attribution has become more difficult, while 41% report an increased focus on contextual targeting and 41% point to rising costs of data collection and analysis. In response, many are adopting new technical approaches, including serverside tracking (42%) and firstparty data strategies (30%). These changes reflect a broader movement toward sustainable, privacyready measurement infrastructure.



# Survey Report Findings

## The biggest challenge in acquiring new app users

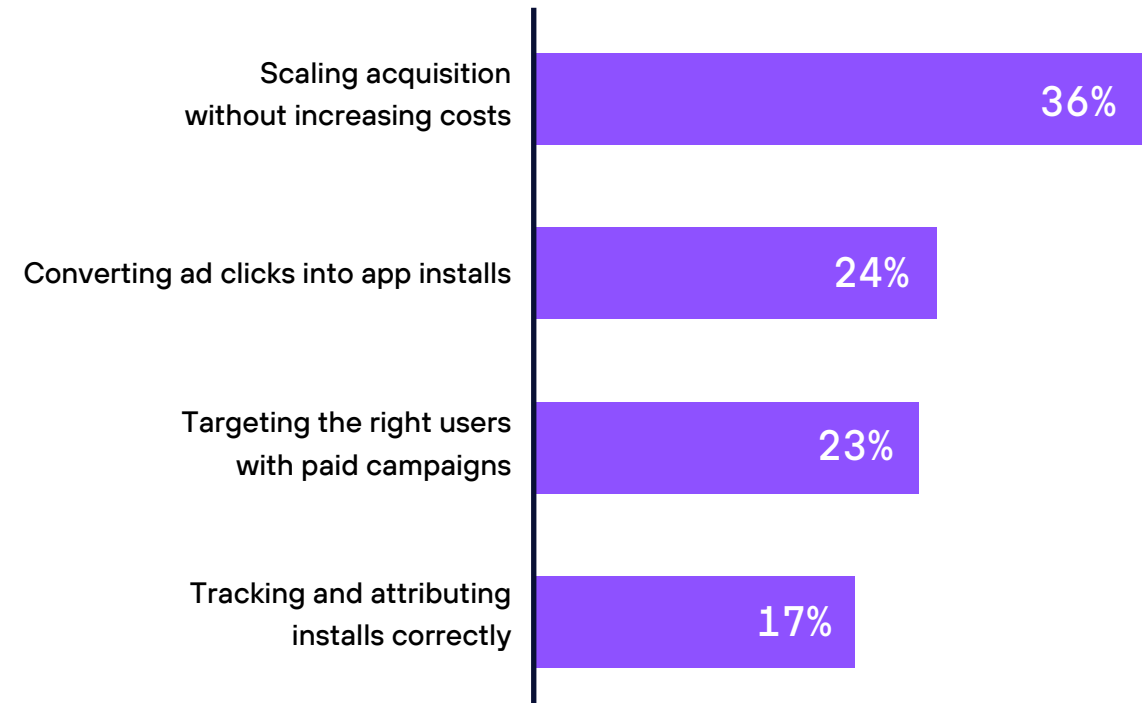
### Cost is the biggest hurdle in acquiring new app users.

Across APAC, marketers are under pressure to scale efficiently. More than a third of respondents (36%) cite scaling without increasing acquisition costs as their top acquisition challenge. As pressure mounts to do more with less, teams are actively seeking ways to make smarter use of their budgets.

Close behind are difficulties converting ad clicks into installs (24%) and targeting the right users through paid campaigns (23%).

Seventeen percent of respondents also flagged attribution as a challenge, highlighting a major opportunity. Tools that support privacy-safe attribution and install tracking are widely available; the next step is putting that data to work. Marketers who optimize based on what is already measurable can improve performance and make smarter budget decisions with greater confidence.

Together, these findings show that APAC marketers are focused on tuning their approach, unlocking more value from their spend, and driving sustainable growth.



**Figure 1:** The Biggest Challenge in Acquiring New App Users

## Confidence in attributing installs to correct marketing source

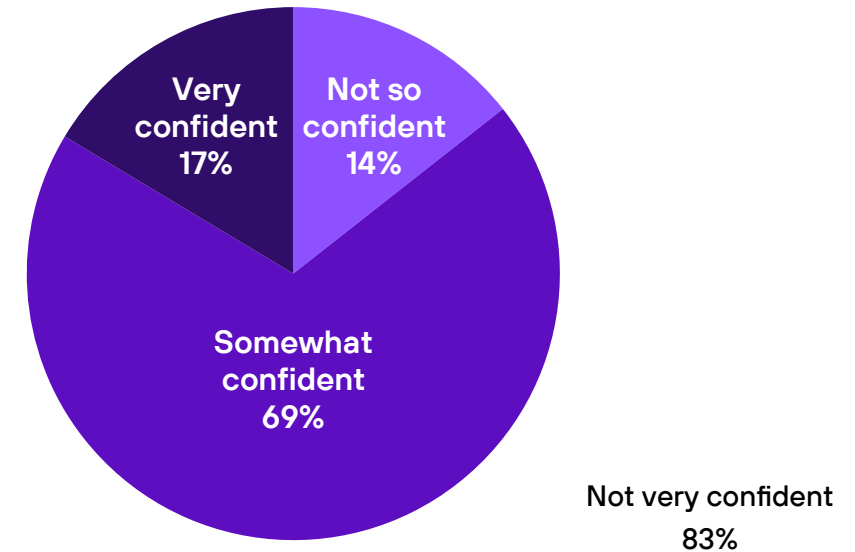
**Eighty-three percent of marketers lack full confidence in their data.**

Only 17% of marketers in the APAC region say they are very confident in their ability to accurately attribute app installs to the correct marketing source. The remaining 83% report feeling somewhat confident or not so confident, pointing to a widespread gap in visibility.

A key reason for this low confidence is the limited use of attributable links across all marketing channels. When links are only used in ads and not in channels like email, SMS, or QR codes, installs often appear as organic. Without a clear record of the user journey, the actual source of the install is lost.

This has real consequences. If marketers cannot see where installs are coming from, they cannot reliably evaluate what is working. They may misattribute campaigns, they may misallocate budgets, and growth becomes harder to optimize.

Improving attribution confidence starts with better link coverage. The more consistently teams use attributable links across channels, the more accurate their data becomes, and the more informed their decisions can be.



**Figure 2:** Confidence in Attributing Installs to Correct Marketing Source

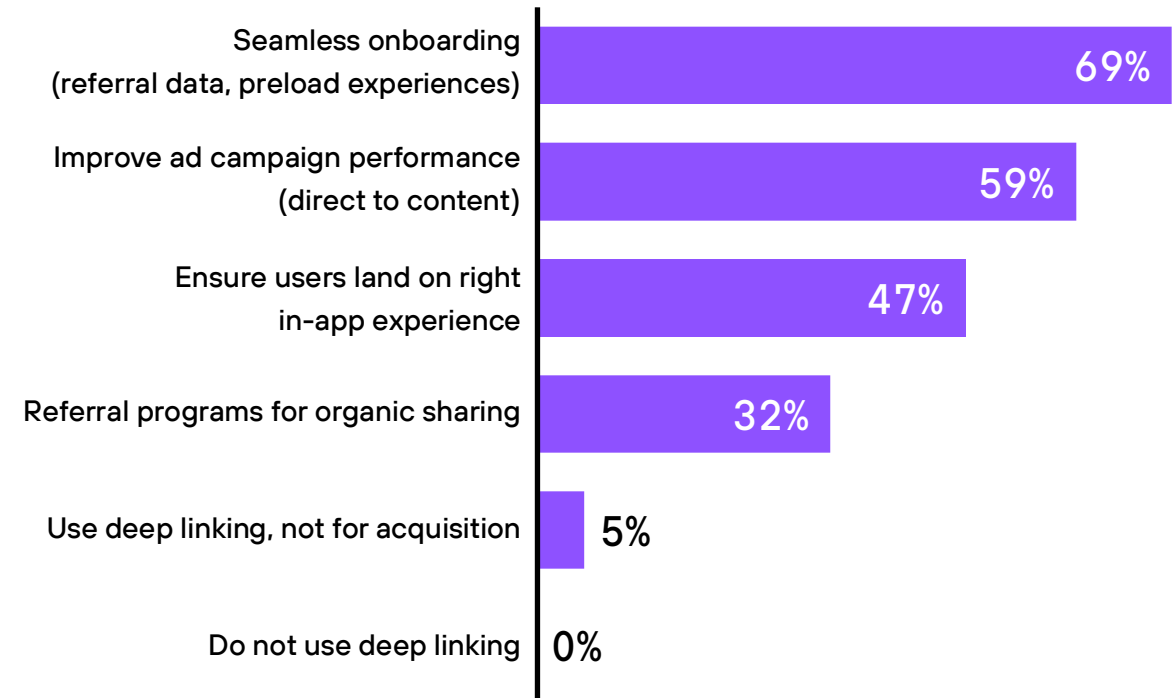
## Use of deep linking for user acquisition

### Deep linking is core to modern acquisition.

Deep linking has become a key part of the mobile acquisition strategy across APAC. Among marketers surveyed, 69% use deep links to create seamless onboarding experiences, while 59% rely on them to improve ad campaign performance by directing users to specific in-app content. These use cases highlight how deep linking reduces friction, increases conversion, and sets the stage for long-term engagement.

The focus on onboarding is especially strategic in fast-moving APAC markets, where user expectations are high and attention is limited. According to Localytics, a strong onboarding experience can boost user retention by up to 50%. By guiding users to the right content from the moment they open the app, deep links help make that first impression count, improving both acquisition outcomes and retention over time.

Another 47% of survey respondents use deep linking to ensure users land on the right part of the app, and 32% apply it to referral programs that reward users and drive organic growth. Notably, every respondent reported using deep linking in some form, reinforcing its status as a foundational growth tool.



**Figure 3:** Use of Deep Linking for User Acquisition

\*Question allowed more than one answer and as a result, percentages will add up to more than 100%.

## Channels used for app growth

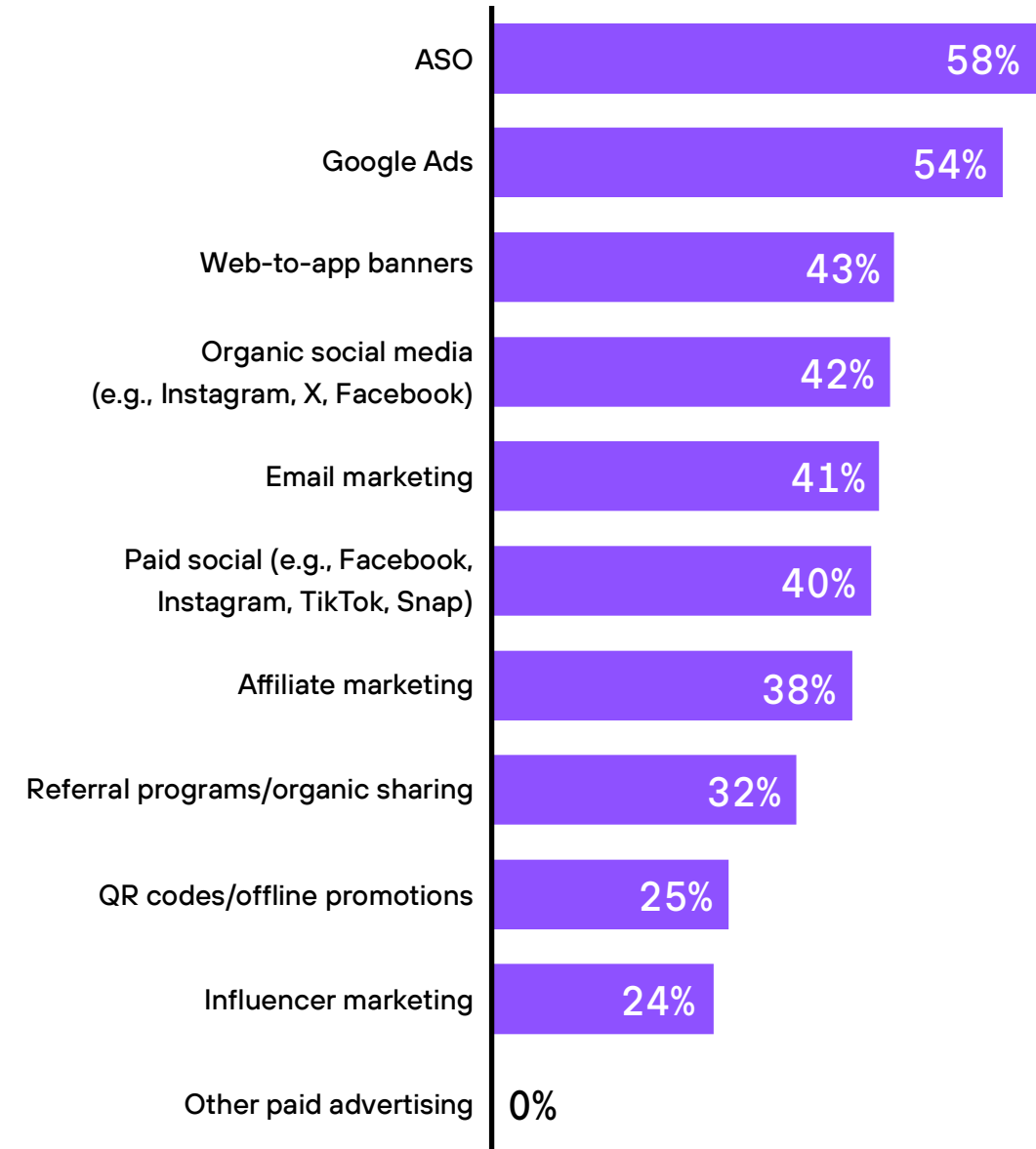
### APAC marketers are expanding their channel mix to meet rising growth demands.

Across APAC, marketers are casting a wide net to drive app growth, combining both paid and owned strategies across the funnel. App store optimization (ASO) leads the pack, used by 58% of respondents, followed closely by Google Ads at 54%. These tactics remain essential in capturing high-intent users.

Web-to-app banners (43%), organic social (42%), email marketing (41%), and paid social (40%) make up the next tier, highlighting the continued importance of cross-channel engagement. These channels support both acquisition and reengagement, offering marketers multiple touchpoints to reach potential users.

Beyond the core mix, marketers are also testing less conventional options. Thirty-eight percent of respondents chose affiliate marketing and 32% chose referral programs. QR codes, offline promotions, and influencer marketing also make an appearance, each used by roughly a quarter of respondents.

The diversity of this mix points to growing experimentation. As pressure to meet growth targets increases, teams are expanding their playbooks and searching for new ways to connect users to the app experience.



**Figure 4:** Channels Used for App Growth

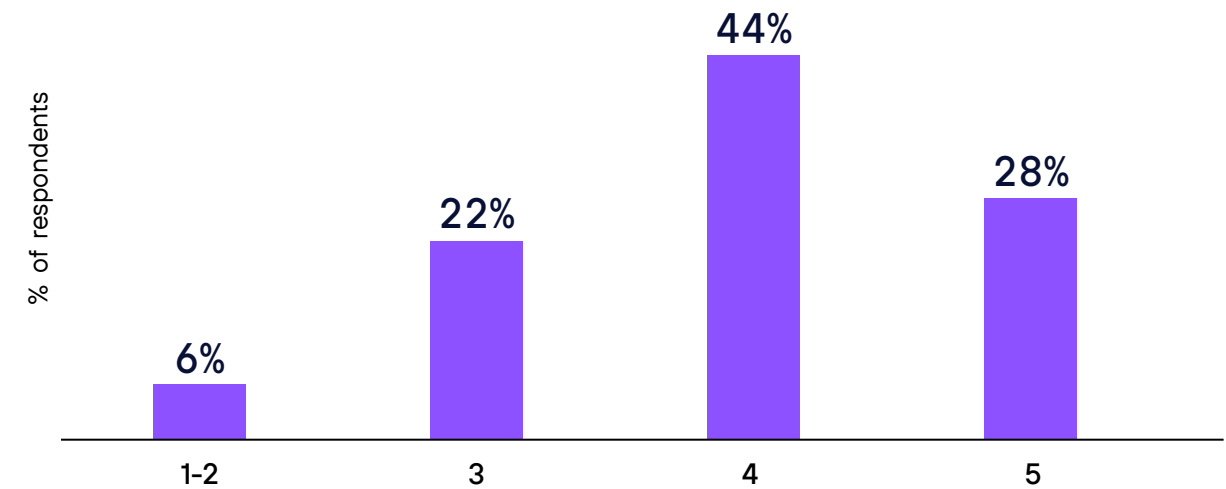
\*Question allowed more than one answer and as a result, percentages will add up to more than 100%.

## Number of channels used for app growth

**Multichannel growth is now standard practice in APAC.**

The average app marketer in the APAC region now uses 3.9 distinct channel categories to drive growth. Most commonly, respondents report using four channels (44%), while 28% use five channels. 22% use three channels, and 6% use only one or two channels.

Average: 3.9 categories



**Figure 5:** Number of channels used for app growth

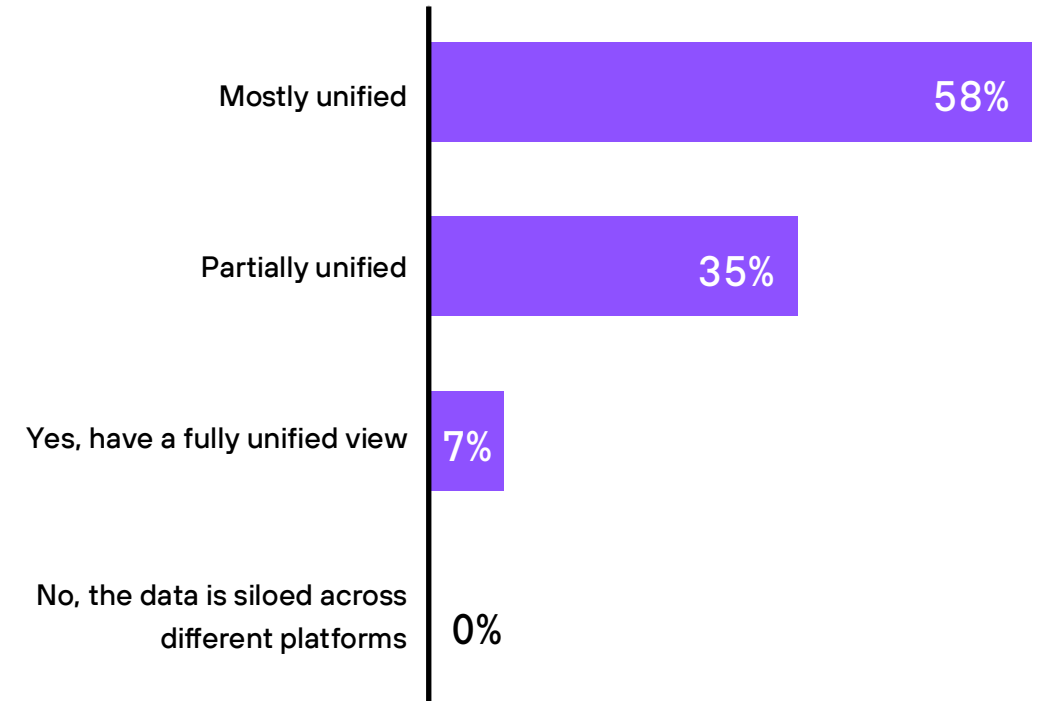
## Unified view of app marketing performance across channels

### Full visibility remains out of reach for most APAC app marketers.

Most marketers in APAC report making progress toward unifying their app performance data, but full integration remains rare. Seven percent say they have a fully unified view across channels, while 58% describe their view as mostly unified, and 35% say it is partially unified.

The challenge is not a lack of effort, but a lack of consolidation. Many teams rely on multiple tools and platforms, each offering a different slice of the picture. On top of that, siloed workflows between marketing, product, and data teams make it harder to connect performance across the entire user journey.

Without end-to-end visibility, it can be challenging to optimize spend or uncover what's truly driving growth. But teams don't need to start from scratch. Consolidating data sources and aligning workflows across marketing, product, and analytics functions can make a significant difference. Tools like deep linking and privacy-safe attribution can also help connect user actions across platforms, filling in critical gaps. As channel strategies diversify and privacy standards evolve, marketers who invest in unified, cross-functional insight will be better equipped to move quickly, allocate budgets effectively, and adapt with confidence.



**Figure 6:** Unified View of App Marketing Performance Across Channels

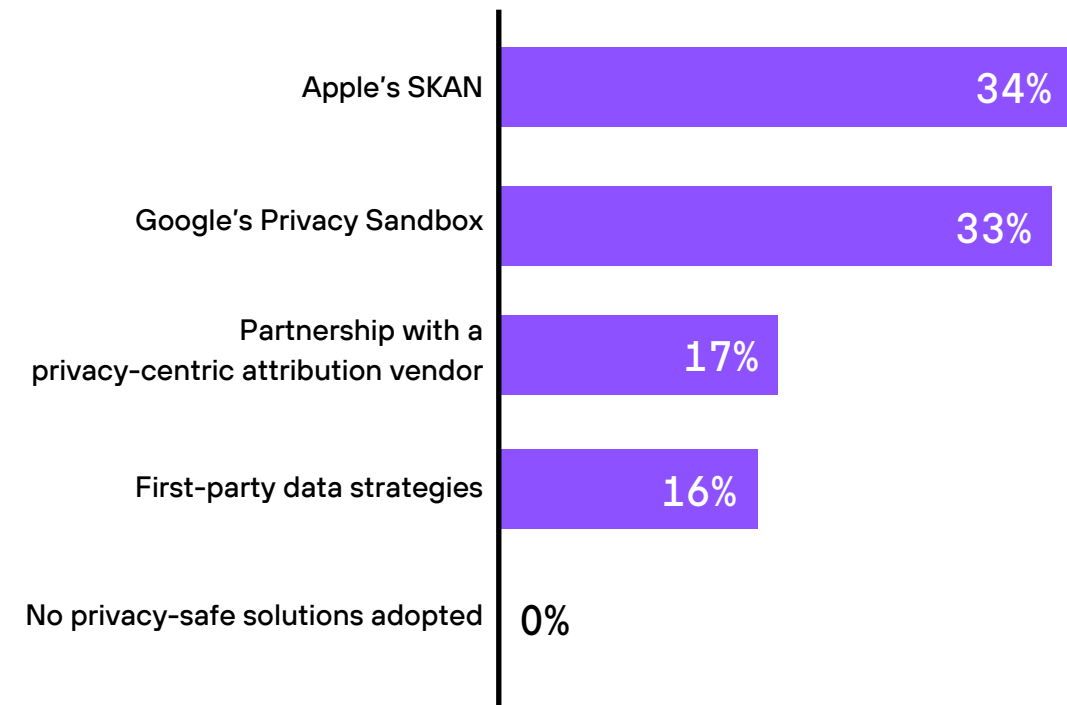
## Privacy-centric measurement solutions adopted

### Marketers in APAC are underutilizing the power of first-party data.

Adoption of privacy-centric measurement solutions is well underway in APAC, driven by platform changes like Apple's SKAdNetwork (SKAN) (34%) and Google's Privacy Sandbox (33%). But marketers aren't stopping there. Many are investing in additional tools to close visibility gaps, including privacy-focused attribution vendors (17%) and first-party data strategies (16%).

These efforts reflect a broader shift toward building a more flexible, privacy-safe measurement stack. As traditional signals disappear, APAC marketers are looking for ways to regain clarity without compromising compliance. First-party data, in particular, offers a sustainable path forward, enabling teams to understand user behavior, personalize responsibly, and make smarter decisions with consented inputs.

This trend points to growing maturity in the region. Rather than reacting passively to change, teams are taking active steps to future-proof their measurement infrastructure and stay competitive as privacy expectations continue to evolve.



**Figure 7:** Privacy-Centric Measurement Solutions Adopted

## Impact of privacy changes on attribution and measurement strategies

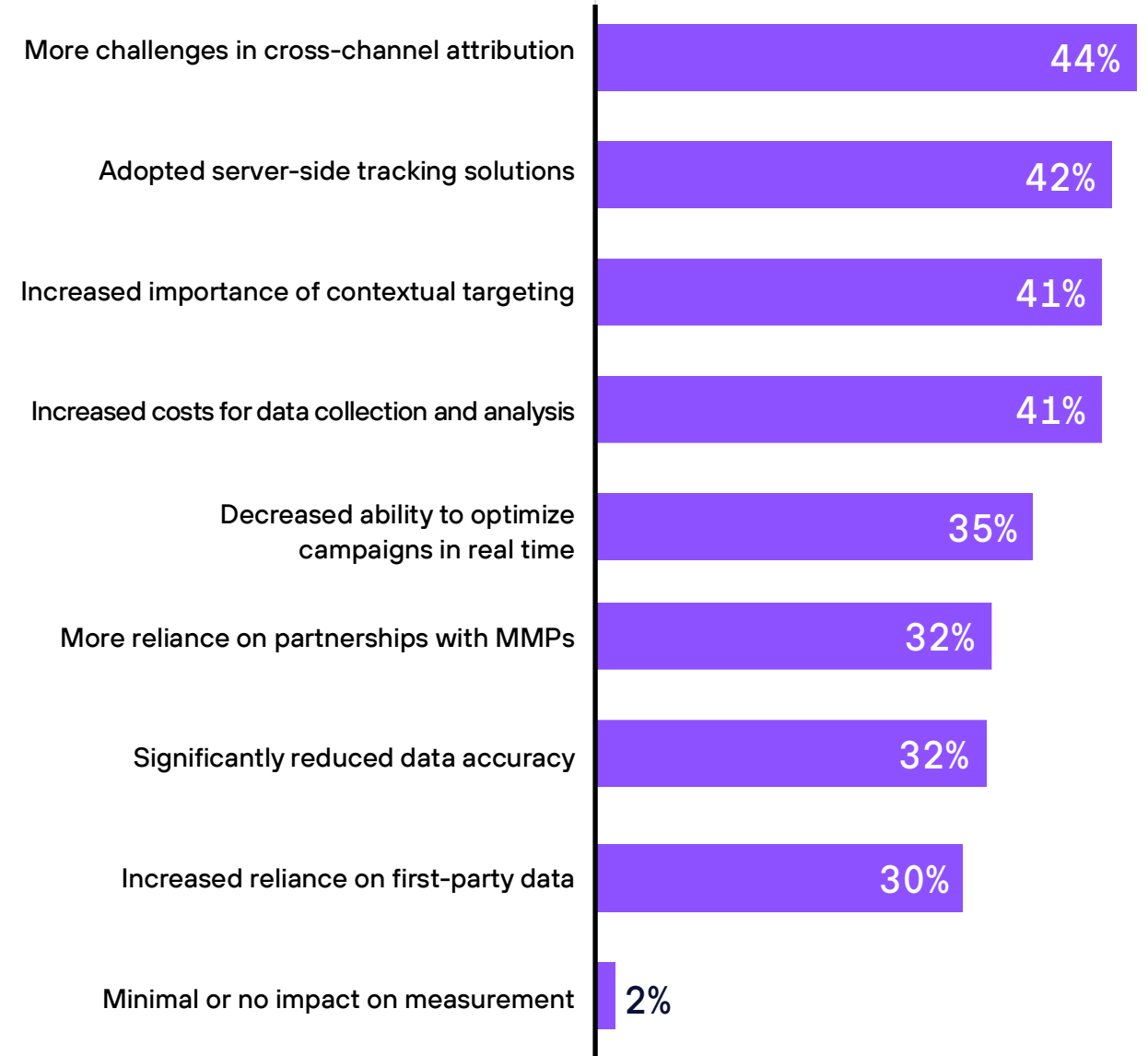
### Privacy changes have redefined the rules of measurement.

Privacy regulations are reshaping how APAC marketers approach attribution and measurement. The most reported impact is greater difficulty in cross-channel attribution, cited by 44% of respondents. This is closely followed by server-side tracking (42%), reflecting a move toward more privacy-compliant data handling.

Respondents also report an increased focus on contextual targeting (41%) and rising costs associated with data collection and analysis (41%), a sign that teams are working harder to achieve the same level of insight they once had.

At the same time, 35% report a reduced ability to optimize campaigns in real time, a likely consequence of delayed or limited access to user-level signals. Other effects include increased reliance on mobile measurement partners (MMPs) (32%), reduced data accuracy (32%), and a broader move toward first-party data (30%).

Only 2% of marketers say they've seen little or no impact, underscoring how widespread these changes are across the region. As regulations continue to evolve, marketers will need infrastructure that can keep attribution accurate, maintain compliance, and provide flexibility across channels.



**Figure 8:** Impact of Privacy Changes on Attribution and Measurement Strategies

\*Question allowed more than one answer and as a result, percentages will add up to more than 100%.

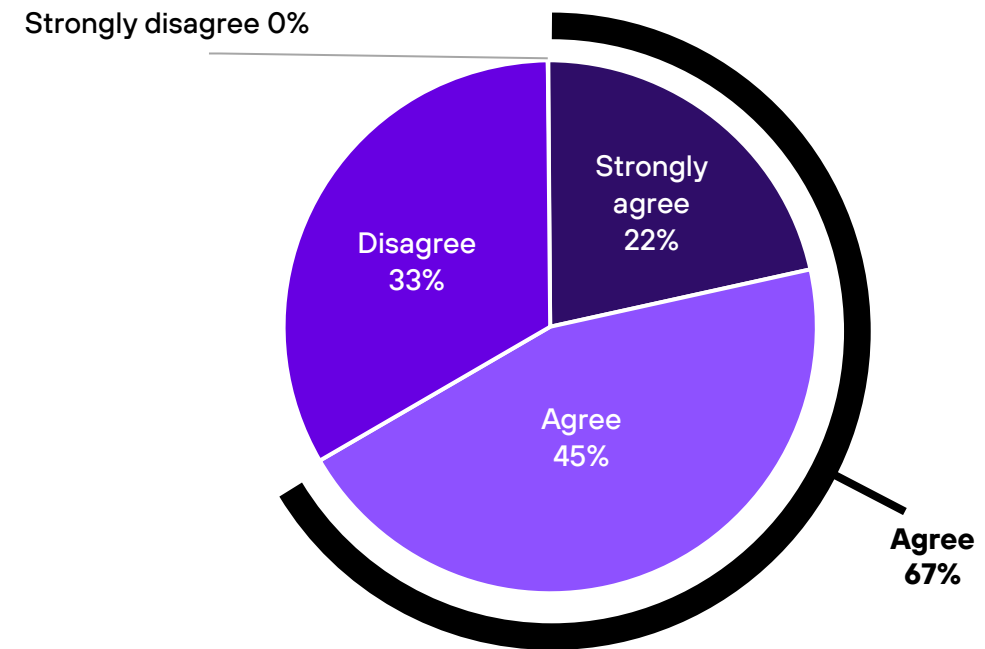
## Impact of privacy regulations on measurement accuracy and revenue

### Measurement gaps are becoming revenue risks.

Privacy regulations are no longer just a compliance concern; they are actively shaping growth outcomes across APAC. Sixty-seven percent of respondents agree that privacy rules have created blind spots in measurement that are costing their companies money. Of those, 22% strongly agree, signaling the depth of the disruption.

These blind spots are more than a technical inconvenience. When marketers cannot track performance accurately, they cannot optimize spend, identify high-value users, or prove ROI. Measurement accuracy and revenue are now tightly linked, and both are being tested in the current environment.

To keep pace, marketers are turning to solutions that can preserve visibility without compromising user privacy. Predictive aggregate approaches, which model install behavior using privacy-safe, nonidentifying data, are emerging as one way to bridge the gap. These methods offer a practical path forward for teams that need to make performance-driven decisions while staying compliant.



**Figure 9:** Impact of Privacy Regulations on Measurement Accuracy and Revenue

## The biggest challenges in retaining app users

### Marketers across APAC struggle to activate data and measure what matters.

Retention is where the cracks in app growth often begin to show. Forty-eight percent of marketers say they struggle with tracking and measuring retention success, the most commonly cited challenge. Close behind, 45% report difficulty activating user data for personalization, and 44% point to internal prioritization issues that slow or derail retention efforts.

A lack of visibility into user behavior after acquisition. Without insight into post-install actions, teams are left guessing where users drop off or how to reengage them effectively. Fragmented engagement across channels, reported by 40%, further complicates efforts, as disconnected experiences can make even strong content and offers less effective.

Thirty-seven percent of respondents noted technical limitations, reflecting underlying infrastructure issues that hold back more sophisticated retention strategies. And while onboarding is often viewed as a critical moment, only 4% of marketers identified onboarding drop-off as their primary concern, suggesting that most retention challenges arise well after the first session.

Still, these gaps present a clear path forward. By improving data access, unifying engagement strategies, and prioritizing post-onboarding moments, APAC marketers have a real opportunity to turn retention into a growth engine.



**Figure 10:** The Biggest Challenges in Retaining App Users

\*Question allowed more than one answer and as a result, percentages will add up to more than 100%.

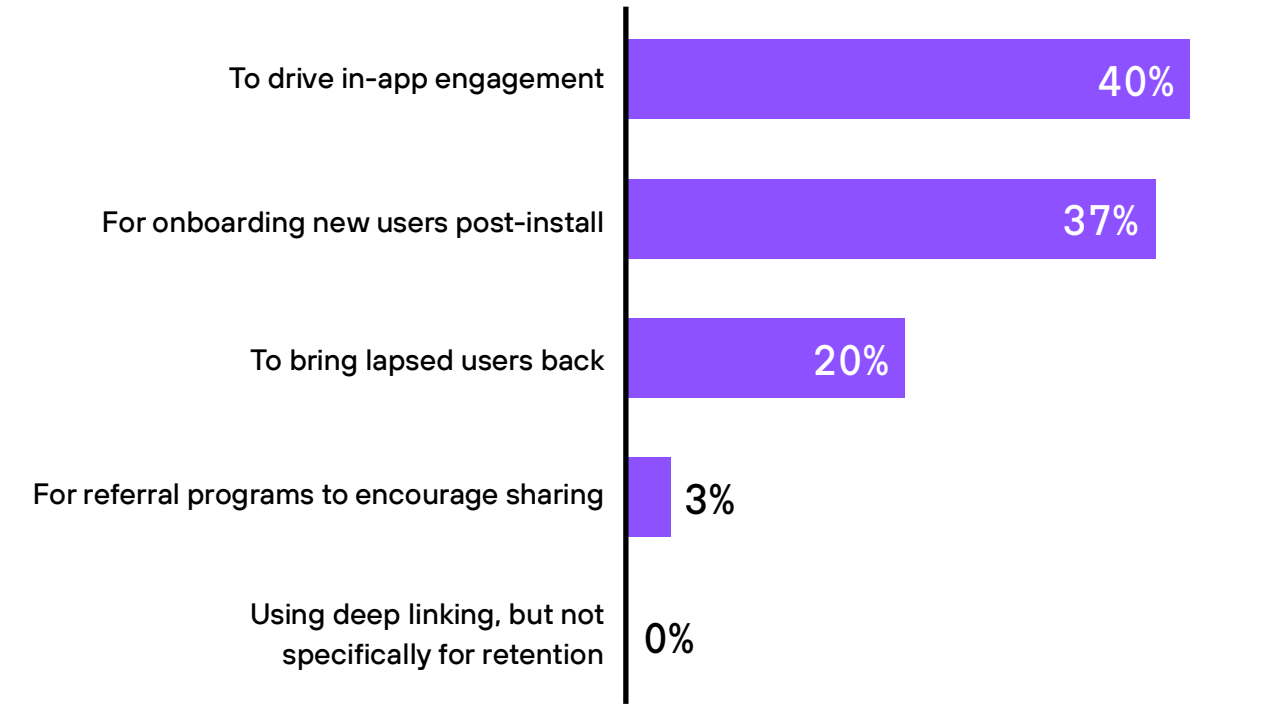
## Use of deep linking for user retention

### Deep linking is a key driver of retention.

Retention may be challenging, but deep linking gives marketers a powerful way to improve it. Forty percent of marketers use deep links to drive in-app engagement, while another 37% use them to onboard new users after install. These touchpoints help reduce friction and guide users directly to relevant app experiences, increasing the likelihood that they stay active.

Twenty percent of respondents also use deep linking to bring lapsed users back into the app.

Usage remains lower in referral programs, with just 3% of APAC marketers applying deep links to encourage sharing and organic growth. But that too is an opportunity. When used across more touchpoints, deep linking can not only support acquisition but also play a larger role in strengthening long-term user relationships.



**Figure 11:** Use of Deep Linking for User Retention

## Use of AI for app growth

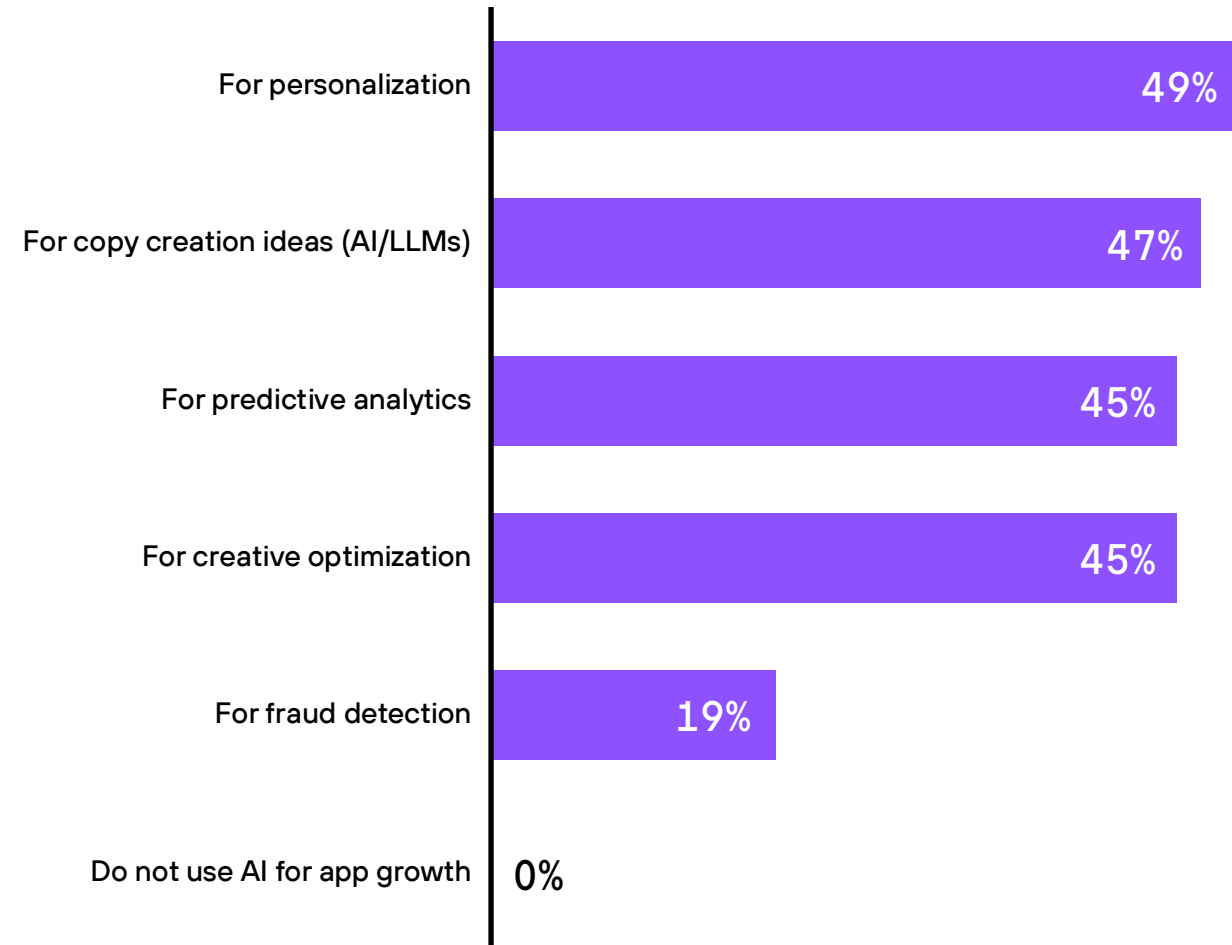
### AI is the new growth stack.

Marketers are weaving artificial intelligence (AI) into multiple layers of the app growth process, whether it is predicting behavior, optimizing creative, or identifying risks.

Unsurprisingly, every respondent in the survey reports using AI in some capacity to support app growth. The most common application is personalization, cited by 49% of APAC marketers. Close behind, 47% rely on AI and large language models (LLMs) for generating copy and brainstorming creative ideas, a sign that content creation itself is evolving, with AI becoming a day-to-day collaborator in both strategy and execution.

Predictive analytics and creative optimization each follow at 45%, reinforcing AI's role in scaling decisions and campaign performance.

While less common, 19% of respondents use AI for fraud detection, demonstrating that its value extends beyond user-facing experiences.



**Figure 12:** Use of AI for App Growth

\*Question allowed more than one answer and as a result, percentages will add up to more than 100%.

## Barriers to AI-integration in user experiences in the next two years

**Trust, safety, and integration are the biggest barriers to AI-powered experiences.**

While AI is widely adopted, bringing it into user-facing experiences presents real challenges. Not a single respondent said they foresee no obstacles to integrating AI into user experiences.

The most cited barrier is maintaining end-user trust and data privacy, named by 59% of APAC marketers. As personalization deepens and AI agents become more involved in user journeys, protecting data and earning consent are critical.

Equally pressing are concerns about brand safety and workflow integration. Fifty-three percent of respondents say ensuring brand-safe content delivery is a challenge, and 50% report difficulty integrating AI into existing systems and processes.

Internal adoption also presents a hurdle. Thirty-six percent cite employee reticence as a barrier, suggesting that even with excitement around AI, change management remains essential.

As AI becomes more embedded in how users across APAC discover and interact with brands, overcoming these barriers will be key to delivering experiences that are not only intelligent but also trusted.

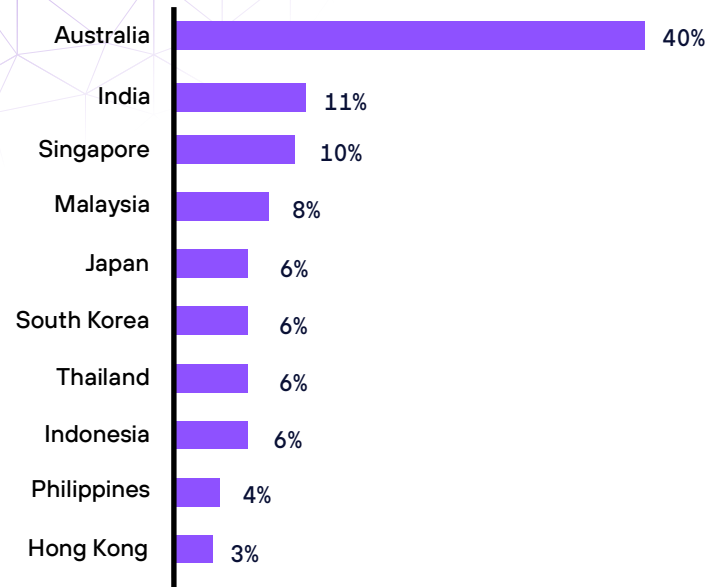


**Figure 13:** Barriers to AI Integration in User Experiences in the Next Two Years

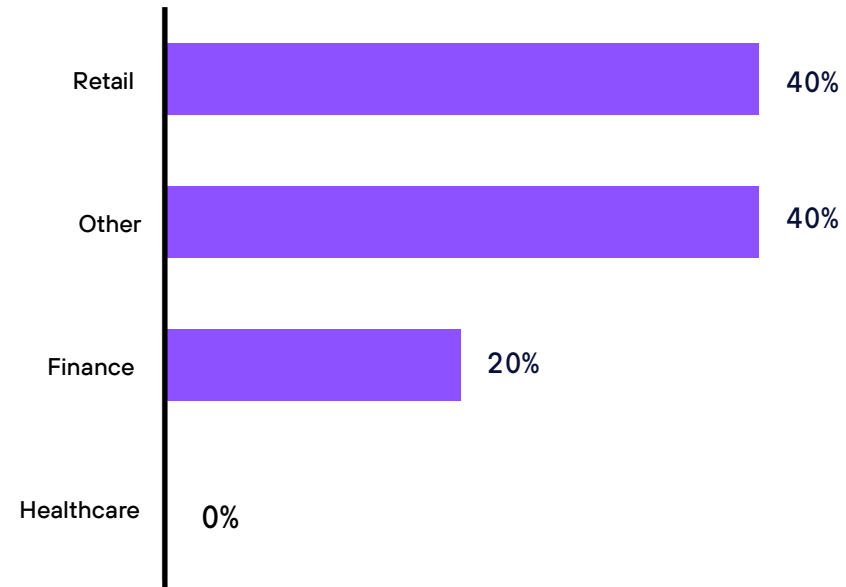
\*Question allowed more than one answer and as a result, percentages will add up to more than 100%.

# Demographics

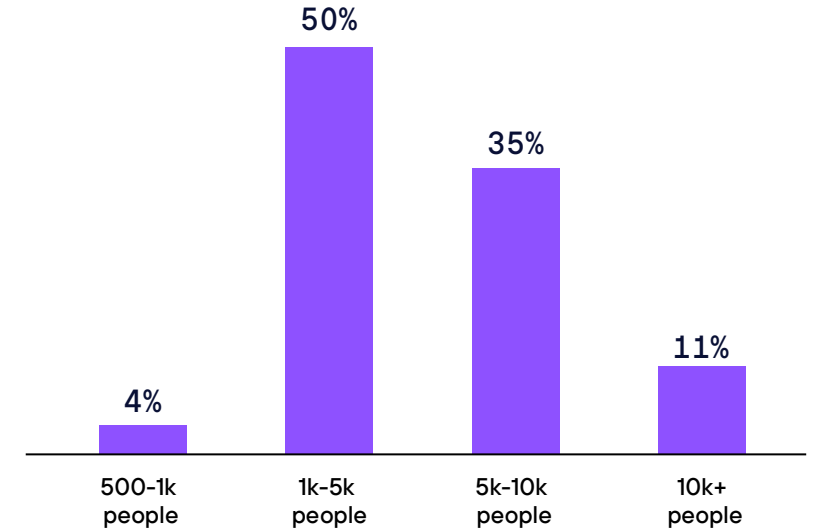
## Region, company size, department, job seniority



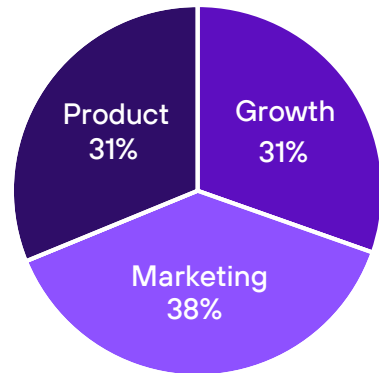
**Figure 14:** Region



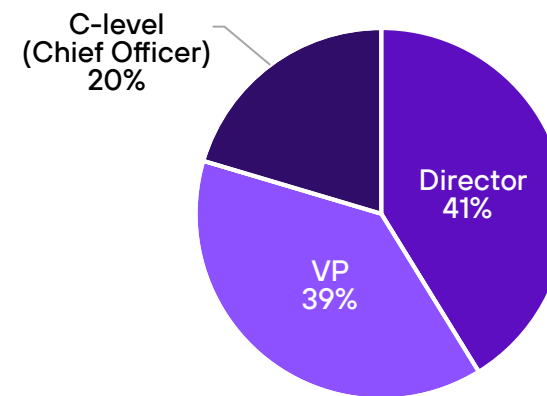
**Figure 15:** Industry



**Figure 16:** Company Size



**Figure 17:** Department



**Figure 18:** Job Seniority



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