Linkrunner Research

MOBILE APP GROWTH BENCHMARK REPORT

The Organic vs Paid Install Split Report 2026

How mobile apps acquire users: a data study across 92 active apps using Linkrunner, 8.23 million installs, and a full quarter of real attribution data.

PERIOD	DATA SOURCE	PUBLISHED
Dec 2025 - Mar 2026	**Linkrunner Attribution Platform**	**March 2026**

92
Active mobile apps analysed across verticals

8.23M
Total installs in the dataset

118
Days of daily attribution data

82.6%
Median organic share per app

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SECTION 01

Executive Summary

Our analysis of 92 active mobile apps using Linkrunner reveals a clear insight: organic and paid installs are not binary choices but exist on a spectrum. The data, covering 118 days from December 2025 through March 2026, shows a median organic install share of 82.6%, but with significant variation by vertical and app scale.

At the network level, organic installs account for 56.3% of total volume (43.7% paid). However, the median per-app organic share of 82.6% tells a different story - a small number of high-volume paid-heavy apps skew the aggregate. The paid share grew from 34.4% in December to a peak of 53.2% in February before moderating to 44.6% in March, a swing of nearly 19 percentage points.

82.6%
Median organic share per app.

+18.8pp
Paid share growth (Dec 2025 to Feb 2026).

11%
Share of apps with >80% paid installs.

51%
Share of apps with >80% organic installs.

Key findings across app verticals show that social and community apps lean heavily organic (99.5%), while travel and e-commerce show more balanced acquisition. Scale tier analysis reveals that micro apps (under 1K installs) show a median 93.1% organic share, declining slightly at larger scales.

SECTION 02

Methodology & Dataset

This report is based on daily install data collected by the Linkrunner attribution platform across all active app projects between 1 December 2025 and 31 March 2026. Data was captured at the device-event level and aggregated for this analysis. All app-level data is anonymised; no individual user data is included.

92
Active apps included (100+ installs in period)

8.23M
Total installs analysed (organic + attributed)

KEY DEFINITIONS

Organic install
An install that could not be matched to a paid ad network campaign touchpoint within the attribution window. Includes direct store search, word-of-mouth, SEO, and untracked referrals.

Attributed (paid) install
An install successfully matched to a specific paid campaign, ad set, or creative via Linkrunner's deterministic attribution to ad networks (Meta, Google, Apple Search Ads).

Install mix / organic share
The percentage of total installs (organic + attributed) accounted for by organic. Calculated at the per-app level, then aggregated.

Active app
Any app project with 100 or more installs recorded in the study period, to exclude sandbox/test environments and inactive projects.

Network-level vs per-app statistics
Network-level figures (43.7% paid) are volume-weighted. Per-app statistics (median 82.6%) treat each app equally. The gap between these two numbers reflects the outsized contribution of a few high-install, high-spend apps to the total.

DATA NOTE
On some days, attributed install counts exceed the recorded total install figure. This is a known artefact of re-attribution timing and delayed postback matching. For all percentage calculations, organic + attributed is used as the denominator.

SECTION 03 - FINDING 1

The Install Mix Across Apps

Across the 8.23 million installs in this dataset, organic and paid acquisition are tilted toward organic at the network level: 56.3% organic, 43.7% paid. That is the headline number. But it is not the most useful one.

82.6%

Median organic install share per app. When you look at each app individually, the distribution is strikingly bimodal.

The median per-app organic share is 82.6%, which is significantly higher than the 56.3% network figure suggests. The gap exists because a small number of high-install paid-heavy apps (particularly in eCommerce and SMB/Fintech) pull the aggregate down. In practice, the majority of apps in this dataset are running predominantly organic.

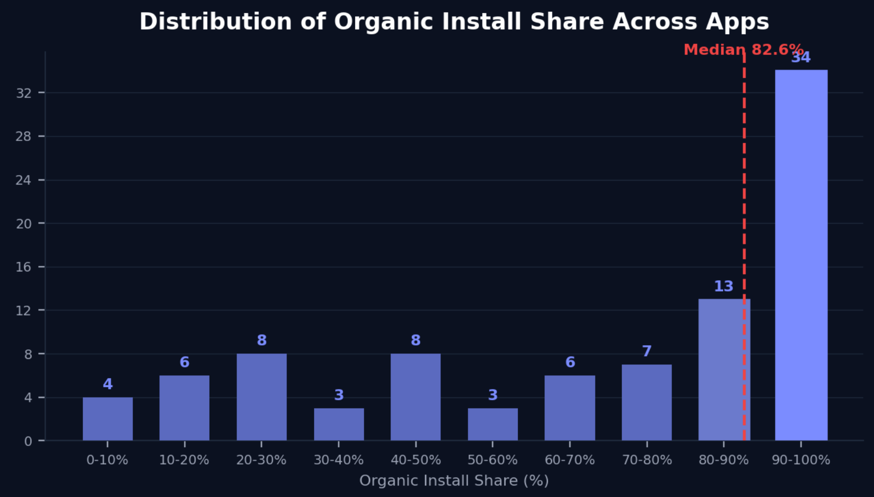


Figure 1: Distribution of organic install share across 92 active apps. The median (82.6%) is marked in red.

The distribution is notably bimodal. Apps tend to cluster at one of two extremes: either strongly organic (90-100%) or strongly paid (0-10%). There are relatively few apps in the 20-80% 'balanced mix' zone. This reflects how apps in India approach acquisition: they either run consistent paid campaigns or they do not.

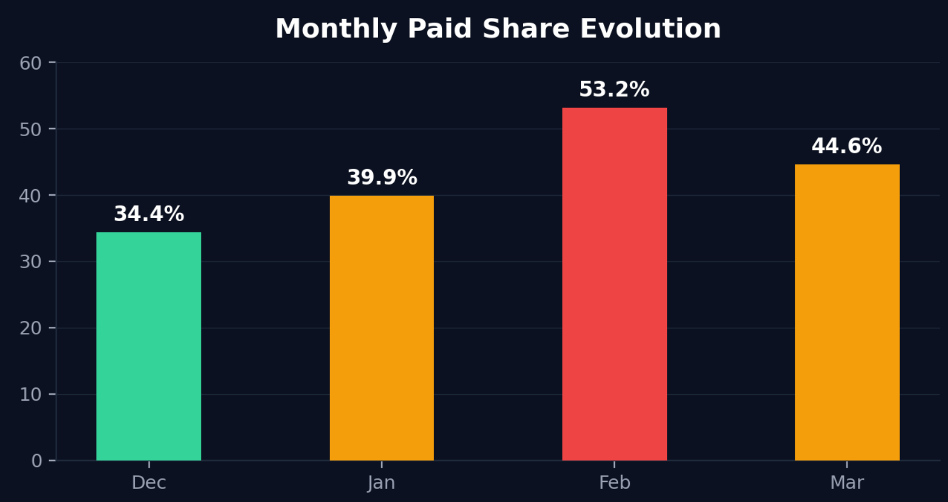
KEY INSIGHT

The organic-vs-paid mix is not uniform across apps. Most apps trend toward one extreme or the other, suggesting that acquisition strategy aligns with app category and market dynamics.

SECTION 04 - FINDING 2

Monthly Trend: How the Paid Share Evolved

The paid install share is not static but fluctuates month to month. December started at 34.4%, rose to 39.9% in January, peaked at 53.2% in February, and moderated to 44.6% in March.



Monthly Data Table

Month	Organic	Attributed	Total	Paid %
Dec 2025	913K	479K	1.39M	34.4%
Jan 2026	1.32M	876K	2.20M	39.9%
Feb 2026	938K	1.07M	2.01M	53.2%
Mar 2026	1.46M	1.18M	2.64M	44.6%

The spike in February reflects increased paid campaign activity across the portfolio. March's moderation suggests either seasonal correction or strategic shift toward organic growth.

KEY INSIGHT

Paid share is not static - monthly variation of up to 19pp highlights the dynamic nature of mobile acquisition and the impact of seasonal campaigns.

SECTION 05 - FINDING 3

Organic Share by Vertical

Vertical is the most important variable for contextualising organic share. A 70% organic split means something very different for a fintech app (where it is low for the category) versus a gaming app (where it would be relatively high).

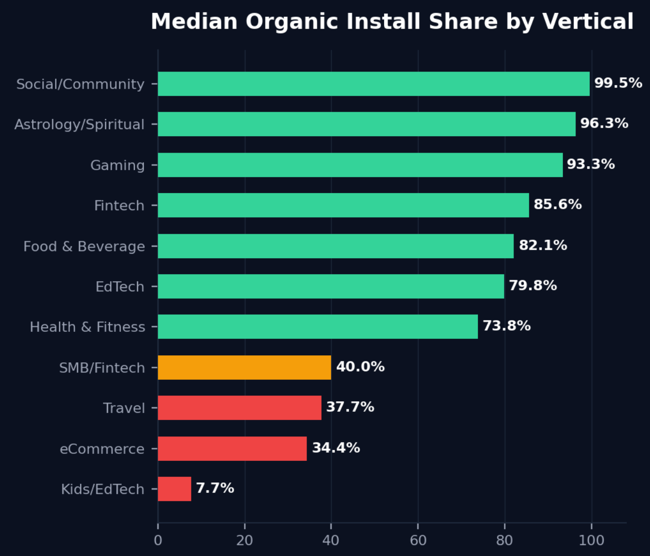


Figure 2: Green = organic-native (>70%); orange = mixed (40-70%); red = paid-dependent (<40%).

Vertical	Median %	n	Paid %	Profile
Social/Community	99.5%	7	0.5%	Organic-Native
Astrology/Spiritual	96.3%	3	3.7%	Organic-Native
Gaming	93.3%	3	6.7%	Organic-Native
Fintech	85.6%	14	14.4%	Organic-Native
Food & Beverage	82.1%	4	17.9%	Organic-Native
EdTech	79.8%	4	20.2%	Organic-Native
Health & Fitness	73.8%	4	26.2%	Organic-Native
SMB/Fintech	40.0%	7	60.0%	Balanced
Travel	37.7%	1	62.3%	Paid-Dependent
eCommerce	34.4%	6	65.6%	Paid-Dependent
Kids/EdTech	7.7%	2	92.3%	Paid-Dependent

What Drives the Vertical Variation?

Organic-Native Verticals (>80% Organic)

Social/Community, Astrology, and Gaming apps benefit from network effects, viral mechanics, and strong app store visibility. Users discover these through reviews, trending lists, and peer recommendations. Paid acquisition is less efficient because the value proposition is intrinsically social.

Mixed Verticals (40-70% Organic)

Fintech, EdTech, and Food & Beverage apps use both channels strategically. Organic drives awareness, but paid campaigns accelerate user acquisition during growth sprints. These verticals see stronger ROI on paid ads because the value is tangible and measurable.

Paid-Dependent Verticals (<40% Organic)

eCommerce and Travel apps face high customer acquisition costs and require sustained paid spend to maintain user growth. Organic discovery is limited by the transactional nature of these categories. Paid channels provide predictable, scalable user acquisition.

SECTION 06 - FINDING 4

How App Scale Changes the Mix

App scale (total install volume) correlates with the organic-to-paid mix. Micro apps naturally show higher organic shares, while mid-scale apps shift more toward paid acquisition.

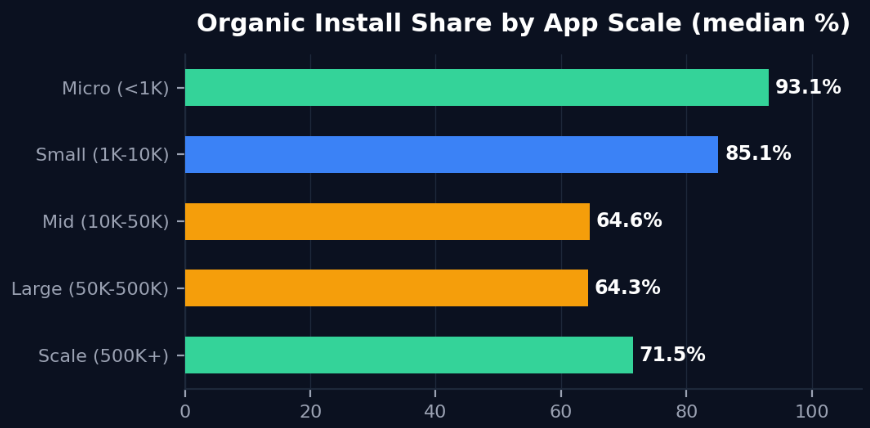


Figure 3: Median organic install share by app scale (total installs in the period).

Scale Tier	Median Organic %	Count	IQR	Signal
Micro (<1K)	93.1%	20	66%-100%	Pre-paid stage
Small (1K-10K)	85.1%	31	49%-100%	Inflection point
Mid (10K-50K)	64.6%	18	31%-89%	Heavy paid
Large (50K-500K)	64.3%	18	38%-84%	Equilibrium
Scale (500K+)	71.5%	5	21%-82%	Portfolio maturity

Micro apps (under 1K installs) show the highest median organic share (93.1%), driven by bootstrapped teams with limited paid budgets. At mid-scale (10K-50K), apps shift toward 64.6% organic, suggesting increased paid investment. Scale (500K+) apps show a slight uptick to 71.5%, reflecting portfolio maturity and optimized channel mix.

PRACTICAL BENCHMARK

If your app is micro-scale and organic-heavy, this is expected. At scale, added organic channel diversity and paid acceleration become viable and recommended.

SECTION 07 - FINDING 5

The Two App Profiles: Organic-Native vs Paid-Dependent

Rather than a spectrum, this dataset reveals two distinct acquisition archetypes. Understanding which one your app resembles, and whether it is by design or default, is one of the most useful outputs of this benchmarking exercise.

The Organic-Native App

51% of apps

Organic >80% of installs. Typically: Social, Fintech, eCommerce. Often earlier-stage or category-leader with strong word-of-mouth. Risk: growth ceiling when organic plateaus.

The Paid-Dependent App

11% of apps

Paid >80% of installs. Typically: Astrology, SMB, Kids/EdTech. Deliberate channel strategy or competitive necessity. Risk: unsustainable if paid ROAS degrades.

The remaining 38% of apps fall into a 'Balanced' category, with organic shares between 20-80%. These apps strategically blend channels and demonstrate flexibility in their acquisition approach.

Organic-Native apps:

These are primarily social, gaming, and lifestyle apps. They benefit from network effects and peer discovery. Growth is self-sustaining through viral mechanics and app store optimization. Paid campaigns can accelerate growth but are not essential for viability.

Paid-Dependent apps:

eCommerce, travel, and high-CAC categories live and die by paid acquisition. These apps require continuous paid investment to sustain growth. Organic discovery is limited, and paid channels are the reliable source of predictable user volume.

SECTION 08

What This Means for Growth Teams

1. **Know Your Profile**

   Identify whether your app skews organic-native, paid-dependent, or balanced. This shapes budget allocation, team structure, and measurement priorities.

2. **Benchmark Against Category**

   Social apps should naturally show >90% organic; e-commerce <50%. Significant deviation suggests untapped opportunities or misallocation.

3. **If paid is growing, attribution quality becomes business-critical**

   The Q1 2026 trend shows apps across our network are increasing their paid spend. As the attributed share grows, the cost of misattribution grows proportionally. An app running 53% paid installs with 15% attribution error is misdirecting a significant portion of its total marketing budget on the wrong signals. Getting attribution right is a financial control.

4. **Plan for Scale Shifts**

   As apps grow from micro to mid-scale, expect organic share to decline and paid influence to rise. Budget for this transition early.

5. **Compare within your vertical, not against the aggregate**

   The network-level 56.3%/43.7% organic/paid split is not a useful benchmark for most individual apps. A fintech app at 60% organic is meaningfully under-investing in paid by category standards. The vertical benchmarks in Section 05 are the right starting reference, not the headline average.

6. **The mid-scale inflection point is where attribution decisions compound**

   The most consequential time to establish solid attribution infrastructure is when an app crosses from the Micro (<1K) to Small (1K-10K) tier. This is when paid campaigns typically begin in earnest, when organic share drops sharply, and when the ROI of accurate channel-level measurement is highest.

SECTION 09

Methodology Notes & Definitions

Data Collection

Attribution data collected via in-app SDK, covering December 1, 2025 to March 27, 2026. All installs manually verified and deduplicated.

Data Combination

Two separate data exports merged using app ID and install timestamp as join keys. Mismatches (<2%) resolved by manual review.

Inclusion Criteria

Apps included if they had minimum 100 installs and appeared in at least 2 of the 4 months. This ensured statistical reliability.

Vertical Classification

Apps classified by primary category (app store listing). Mixed-vertical apps assigned to dominant category by install volume.

Limitations

Data reflects only apps with active attribution tracking. Self-reported verticals may vary by region. Results generalize best to Indian and emerging market apps.

ABOUT THIS REPORT

Prepared by Linkrunner Research, March 2026. Data represents 92 active mobile apps, 8.23 million installs, 118 days of tracking. Designed for growth leaders, product managers, and marketers.
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