App Industry Talent Intelligence

August 2026

NEON RIVER

Contents

What's Inside

We are pleased to present the August 2026 edition of the App Talent Intelligence report.

This report analyses headcount growth rate and attrition trends across 185 of the largest app businesses in EMEA. Drawing on extensive talent market data, it provides insight into the hiring patterns of leading app companies across the region.

Features

- A roster of 185 app businesses across a range of sectors
- Company rankings for each sector, ordered by headcount growth rate
- Sector-level scatter plots comparing headcount growth and attrition across companies
- Average headcount growth and attrition rates for each sector
- A country-by-category heatmap showing where different types of app businesses are headquartered

We hope this report provides valuable insight for leaders across the mobile app industry.

If you have any feedback or suggestions for future editions, please contact us at peter@neonriver.com

Understanding the people behind the apps shaping our world.

The app economy is one of the largest and most vibrant parts of the technology sector.

Despite its scale and complexity, few reports have analysed the app industry through the lens of talent.

This report analyses the talent behind the largest and most important app companies in EMEA.

About Neon River

Neon River helps the world's leading app, games and technology companies hire exceptional leadership talent.

Our clients include app companies such as Calm (wellness) and Lingokids (e-learning) as well as leading mobile games companies such as King and Miniclip.

"At Miniclip, we've worked with Peter and Neon River on several important hires over the years, and we've always been very happy with the experience.

I'd recommend Neon River as one of the very best executive search firms in the market."

Rob Small, Founder and President

For most companies, headcount figures are based on LinkedIn data filtered for employees located in EMEA collated in August 2026.

For companies with more than 1,000 LinkedIn employees in EMEA, we cross-checked the figures against annual reports, company websites and reliable news reports published in 2025 or later, where available. As recent public headcount data is unavailable for many private companies, this was generally limited to larger businesses.

Where LinkedIn's global headcount was within 20% of the publicly reported figure, we used the LinkedIn EMEA headcount data. Where the difference exceeded 20%, we reviewed the discrepancy individually. Possible explanations included: self-employed workers, drivers, contractors or agency staff listing the company as their employer; employees incorrectly associating themselves with companies that have generic names; outdated LinkedIn profiles; underrepresentation of operational or customer service employees on LinkedIn; and employees of acquired businesses continuing to list the local brand rather than the parent company.

We assessed each case based on the company's business model, workforce structure, acquisition history and recent growth. Where the public figure appeared more reliable, we used it as the primary global headcount. We then calculated the proportion of the company's global workforce located in EMEA using LinkedIn data and applied this percentage to the public global headcount to estimate the EMEA figure.

Employee growth and attrition figures are based on LinkedIn data filtered for employees located in EMEA.

As any external data source is likely to contain errors, the statistics in this report should be interpreted as directional rather than precise.

Key Findings

Duolingo recorded the highest employee growth in the report, at **141%,** followed by **Trade Republic** at **81%**.

Monzo combines **49%** growth with a sizeable headcount and low attrition.

Rides & Food Delivery and **Fintech** are the largest categories, together accounting for almost half of the 185 companies.

Marketplace and **E-learning** show the strongest average employee growth, although E-learning also records the highest attrition, suggesting greater workforce movement within the category.

Travel is the only category with negative average growth.

The **UK** is the clear **Fintech** hub, while Israel also shows a strong Fintech presence.

Sweden stands out in Entertainment and Wellness, **Türkiye** in Rides & Food Delivery, and **Germany** has a more diversified app ecosystem.

Market Analysis

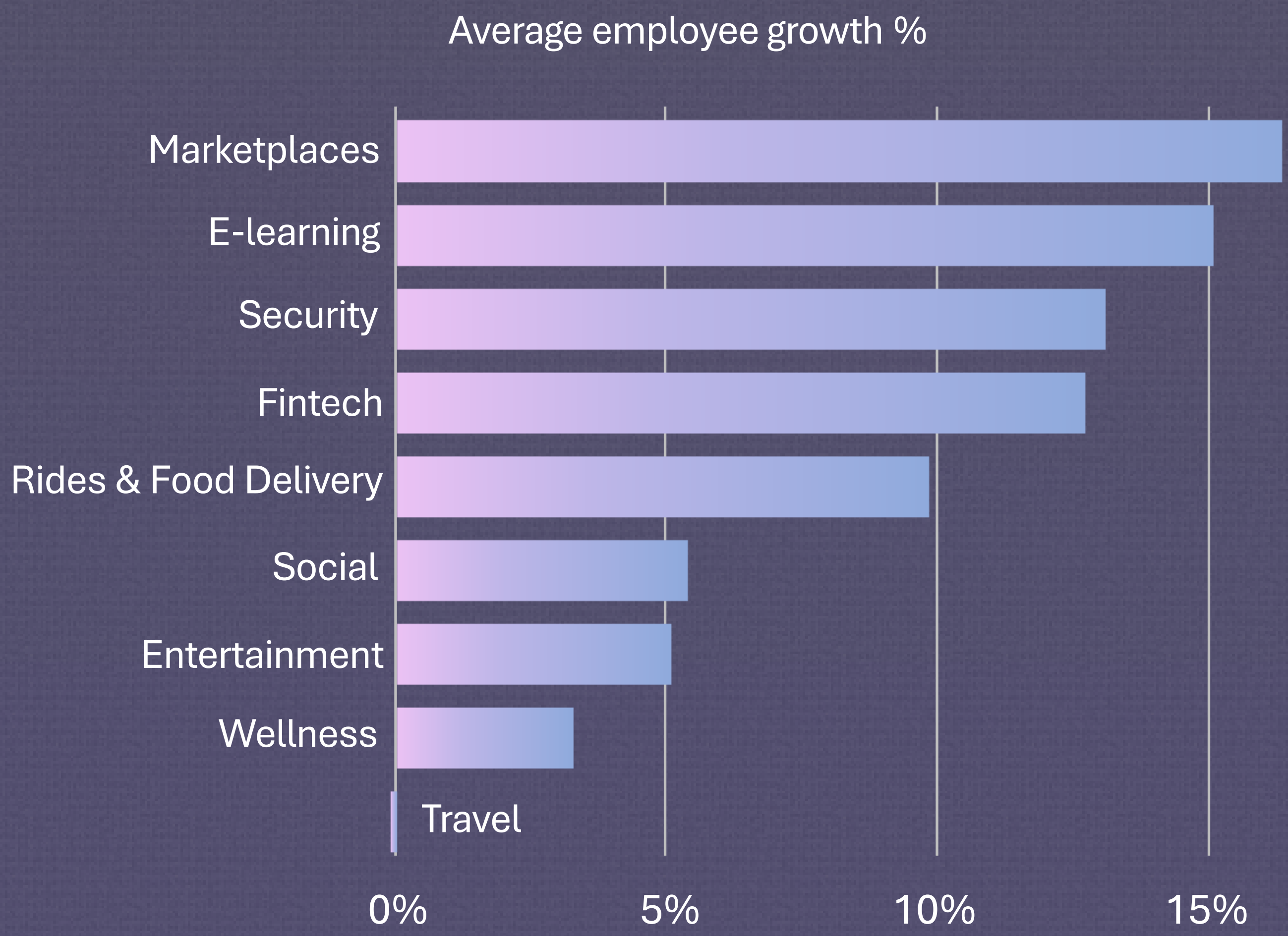
The Fastest Growing Apps

Duolingo is the fastest-growing company in the report, followed by Trade Republic. Fintech is the most represented sector in the top ten, with several sizeable companies recording strong growth.

Rank	Company	Employee Growth	Core offering	EMEA Headcount
01	**Duolingo**	**141%**	Language learning	503
02	**Trade Republic**	**81%**	Investment	1,677
03	**Getcontact**	**74%**	Caller identification	40
04	**Trendyol Go**	**54%**	Food and grocery delivery	831
05	**Monzo**	**49%**	Digital banking	5,373
06	**Robinhood**	**47%**	Investment	231
07	**Revolut**	**46%**	Digital banking	7,006
08	**Wise**	**43%**	International money transfer	3,986
09	**Doping Hafiza**	**41%**	Exam preparation	41
10	**N26**	**38%**	Digital banking	1,552

Average Growth by Sector

Marketplaces and E-learning recorded the strongest average headcount growth, while Travel is the only category to record a slight contraction.



Sector Overview

The app ecosystem spans nine sectors, with Rides & Food Delivery and Fintech accounting for nearly half of all companies analysed.

Marketplace and E-learning recorded the strongest average headcount growth, while Travel is the only category to record a slight contraction.

	Companies	Average employee growth %	Average Attrition %
E-learning	13	15.2	23.2
Entertainment	20	5.1	18.5
Fintech	38	12.8	17.4
Marketplaces	14	16.4	13.9
Rides & Food Delivery	45	9.9	13.7
Security	9	13.2	19.4
Social	15	5.4	19.3
Travel	14	-0.1	15.5
Wellness	18	3.3	15.9
Total	**185**	**9.2**	**16.7**

Country Overview

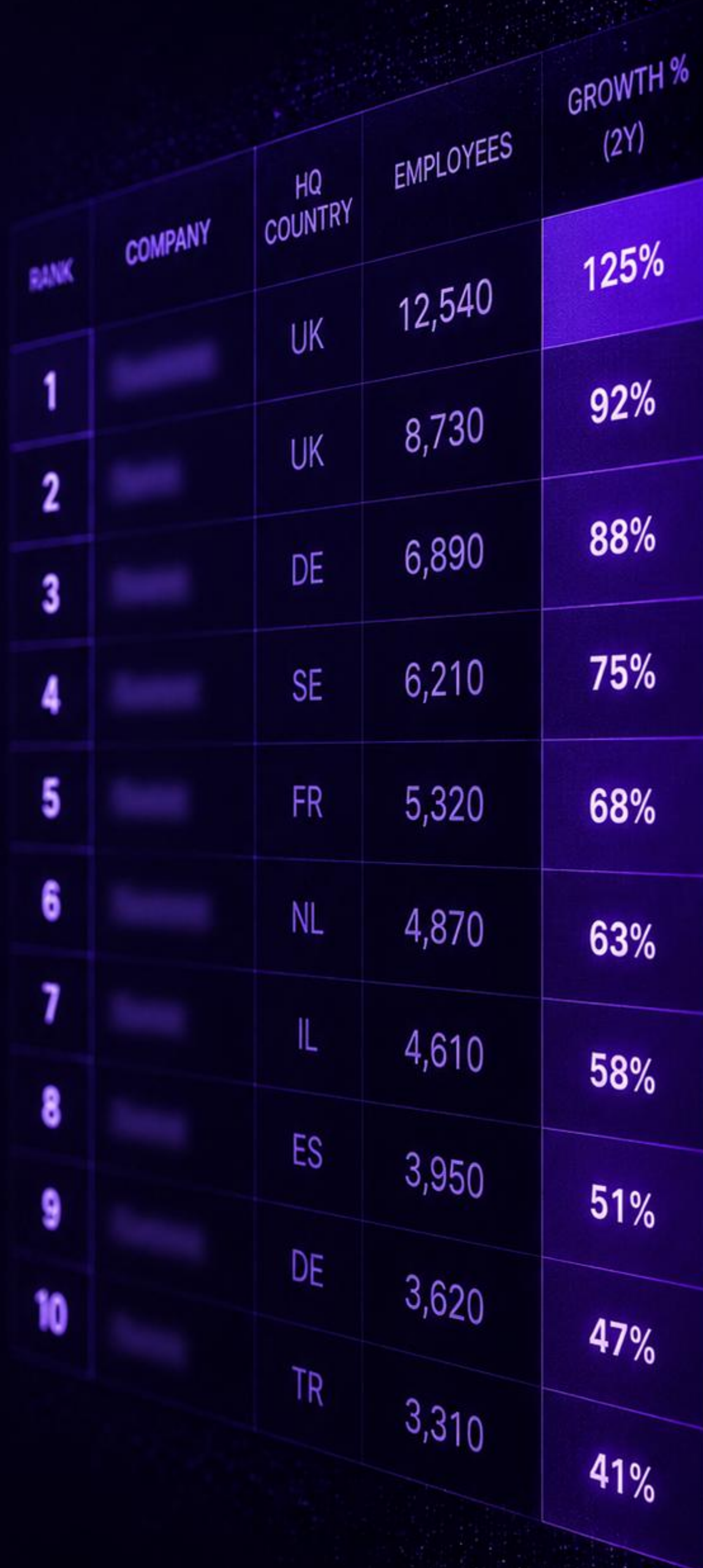
The UK is home to the largest concentration of app companies in the dataset, followed by Germany, Sweden and France.

	Number of Companies		Number of Companies
Austria	2	Netherlands	7
British Virgin Islands	1	Norway	4
Croatia	1	Poland	1
Cyprus	2	Romania	2
Czech Republic	3	Saudi Arabia	1
Denmark	3	South Africa	1
Estonia	1	Spain	5
Finland	2	Sweden	16
France	15	Switzerland	2
Germany	23	Türkiye	13
Greece	1	UAE	3
Israel	12	UK	33
Italy	4	Ukraine	1
Lithuania	2		

Country and Sector Heatmap

The heatmap illustrates how app sectors are distributed across major European technology hubs. Distinct regional specialisms emerge, including the UK's strength in Fintech and Sweden's concentration of Entertainment companies.

	France	Germany	Israel	Italy	Netherlands	Norway	Spain	Sweden	Türkiye	UK
E-learning		3	1				1		1	1
Entertainment	2	3	2	1				5	1	
Fintech	2	5	5	1	1	1		1	2	14
Marketplace	2				1	1	1			4
Rides & Food Delivery	3	5		1	2	1	2	2	5	5
Security			1		1			1	1	
Social	4	1				1	1	2		2
Travel		2	3		1			1	1	6
Wellness	2	4		1	1			4	2	1



Company Rankings

E-learning Apps

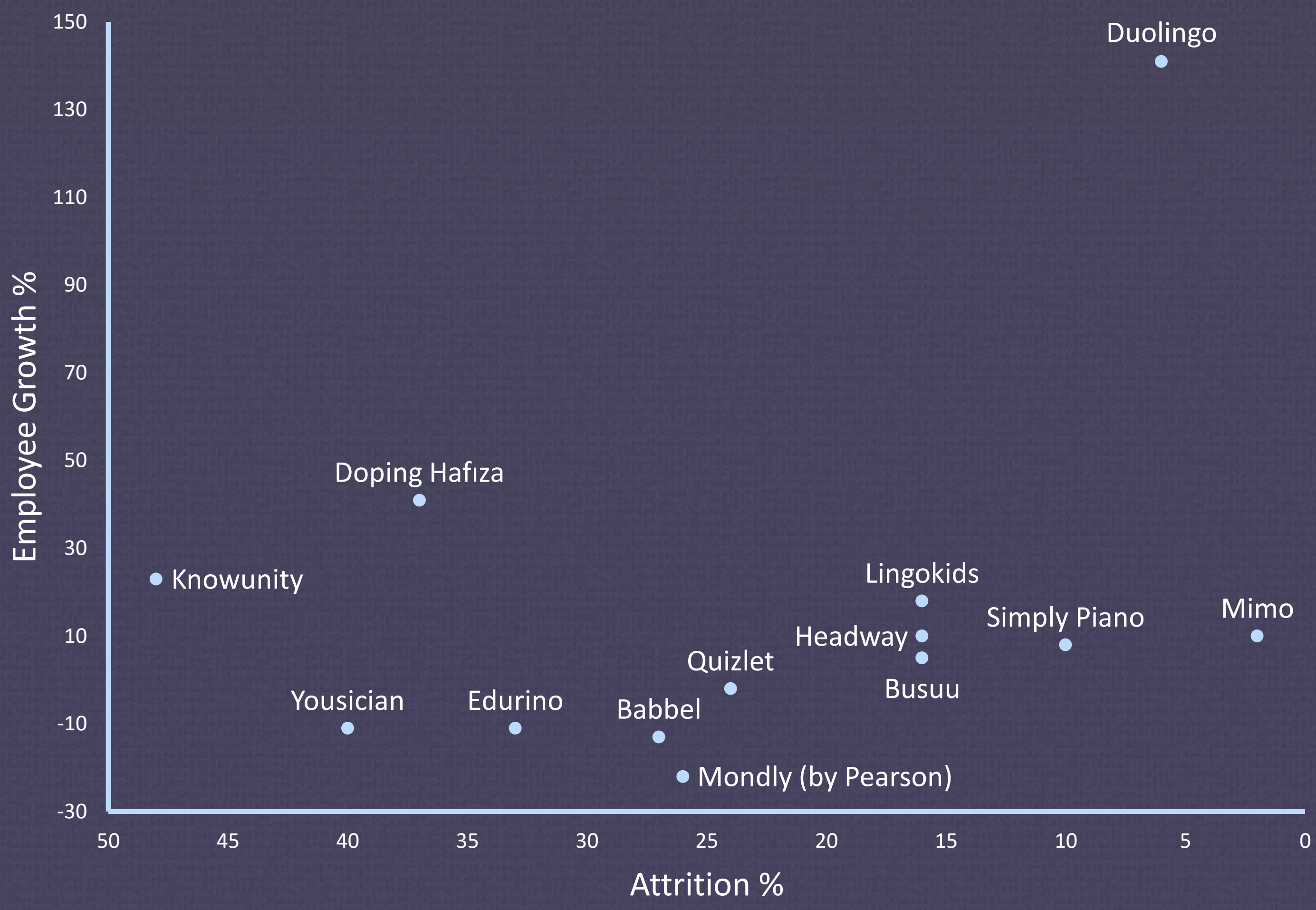
E-learning apps include language learning platforms and broader digital education services.

Rank	Company	Employee Growth %	Attrition %	EMEA Headcount	HQ
01	**Duolingo**	**141**	6	503	US
02	**Doping Hafiza**	**41**	37	41	Türkiye
03	**Knowunity**	**23**	48	125	Germany
04	**Lingokids**	**18**	16	182	Spain
= 05	**Mimo**	**10**	2	169	Austria
= 05	**Headway**	**10**	16	417	Cyprus
07	**Simply Piano**	**8**	10	209	Israel
08	**Busuu**	**5**	16	272	UK
09	**Quizlet**	**-2**	24	87	US
=10	**Edurino**	**-11**	33	63	Germany
=10	**Yousican**	**-11**	40	110	Finland
12	**Babbel**	**-13**	27	792	Germany
13	**Mondly**	**-22**	26	40	Romania

E-Learning Growth and Attrition

Duolingo recorded the highest employee growth among all 185 companies, at **141%,** while maintaining a low attrition rate of 6%.

This is particularly impressive given Duolingo already has more than 500 employees in EMEA.



Entertainment Apps

Entertainment apps include music, audiobooks, digital reading and streaming services.

Rank	Company	Employee Growth %	Attrition %	EMEA Headcount	HQ
01	**Bending Spoons**	33	15	725	Italy
02	**Reface**	27	12	173	Ukraine
03	**Photoroom**	23	9	296	France
04	**SoundCloud**	21	8	399	Germany
05	**Spotify**	13	6	2,899	Sweden
= 06	**Nextory**	8	27	112	Sweden
= 06	**Podimo**	8	21	377	Denmark
08	**Sofascore**	6	16	302	Croatia
= 09	**Bundle**	5	40	41	Türkiye
= 09	**Deezer**	5	12	710	France
11	**Flashscore**	4	6	152	Czechia
12	**365Scores**	3	11	201	Israel
13	**BookBeat**	2	16	185	Sweden
14	**Picsart**	-0.4	16	225	US
15	**Netflix**	-1	35	3,585	US

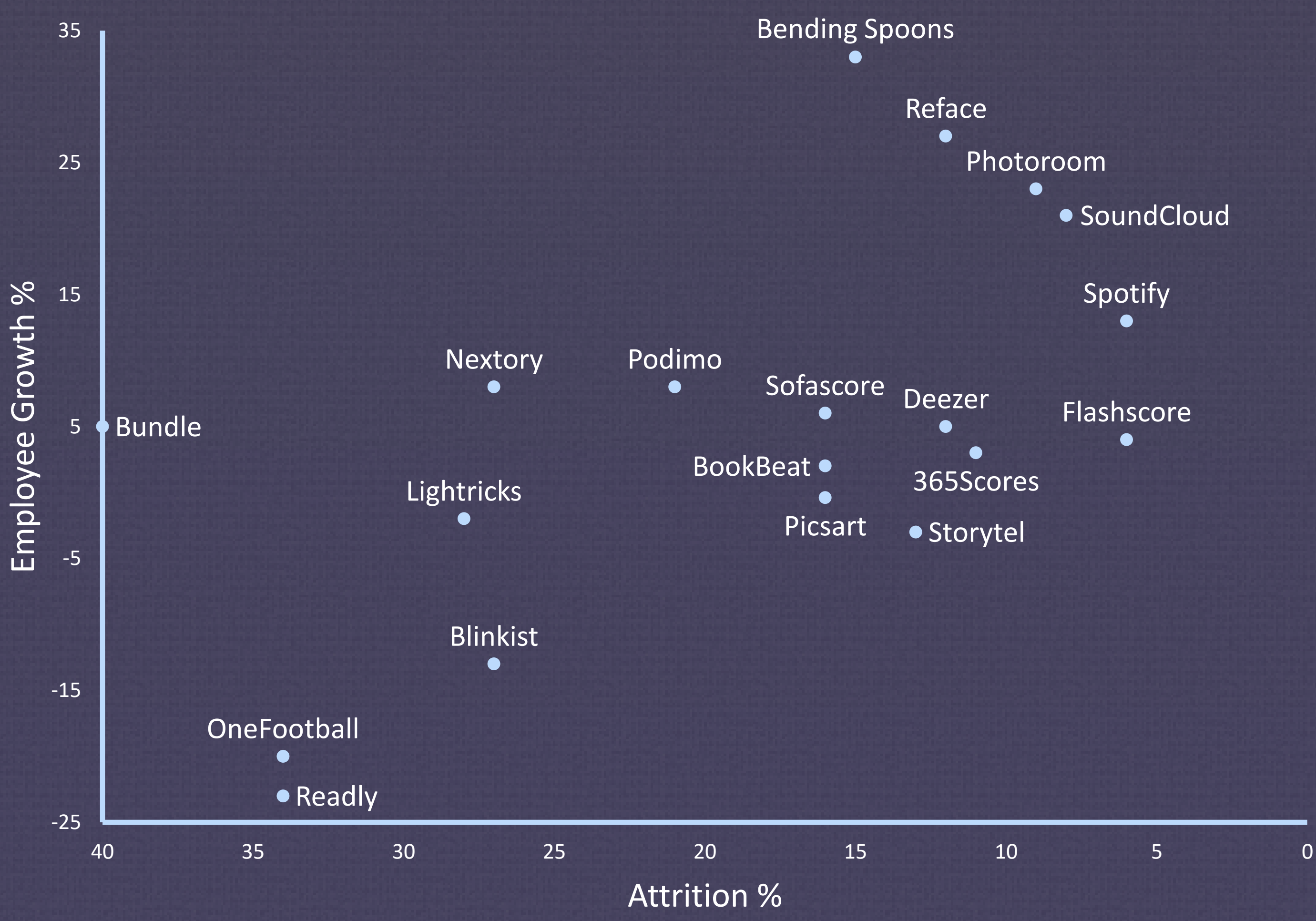
Entertainment Apps continued

Rank	Company	Employee Growth %	Attrition %	EMEA Headcount	HQ
16	**Lightricks**	**-2**	28	480	Israel
17	**Storytel**	**-3**	13	487	Sweden
18	**Blinkist**	**-13**	27	126	Germany
19	**OneFootball**	**-20**	34	243	Germany
20	**Readly**	**-23**	34	75	Sweden

Entertainment Growth and Attrition

Bending Spoons stands out with the highest employee growth rate at 33%, while **Reface** and **Photoroom** also recorded strong growth.

All three have significant exposure to AI-enabled photo and image-editing products.



Spotlight: Bending Spoons

Bending Spoons is an acquisitive technology group operating a portfolio of established consumer apps.

Bending Spoons

Founded **2013** EMEA headcount **725**

Employee growth **33%** HQ **Milan, Italy**

Brand	Offering	Year acquired
vimeo	Video hosting and sharing software	2025
evernote	Note-taking and task management app	2022
Remini	AI-powered photo editing app	2021
WeTransfer	Online file sharing service	2024
meetup	Platform for organizing groups and events	2024
eventbrite	Event discovery and ticketing platform	2026
komoot	Outdoor route planning app	2025
AOL	Email, news and digital media portal	2026

Fintech Apps

Fintech apps include digital banking, investment, payments, lending, crypto and digital insurance platforms.

Rank	Company	Employee Growth %	Attrition %	EMEA Headcount	HQ
01	**Trade Republic**	**81**	16	1677	Germany
02	**Monzo**	**49**	8	5373	UK
03	**Robinhood**	**47**	6	231	US
04	**Revolut**	**46**	18	7006	UK
05	**Wise**	**43**	8	3986	UK
06	**N26**	**38**	14	1552	Germany
07	**Coinbase**	**32**	11	876	US
08	**Midas**	**28**	13	668	Türkiye
09	**Lemonade**	**27**	10	619	Israel/US
10	**Scalable Capital**	**24**	15	815	Germany
11	**Freetrade**	**20**	23	228	UK
12	**Trading212**	**16**	16	971	UK
13	**Bunq**	**14**	30	692	Netherlands
14	**Plum**	**13**	25	286	UK/Cyprus
15	**Zopa**	**12**	17	995	UK

Fintech Apps continued

Rank	Company	Employee Growth %	Attrition %	EMEA Headcount	HQ
=16	**Lightyear**	**11**	13	88	UK
=16	**Bitpanda**	**11**	22	909	Austria
=18	**Chip**	**8**	16	225	UK
=18	**Lunar**	**8**	20	512	Denmark
= 20	**Taxfix**	**5**	17	323	Germany
= 20	**Nickel**	**5**	10	1006	France
= 22	**One Zero**	**3**	17	333	Israel
= 22	**Vipps MobilePay**	**3**	9	475	Norway
= 22	**Satispay**	**3**	18	795	Italy
25	**Bit**	**2**	7	123	Israel
26	**Moneybox**	**0.2**	23	443	UK
= 27	**eToro**	**-0.6**	9	1215	Israel
= 27	**Starling**	**-0.6**	14	3761	UK
= 29	**Curve**	**-1**	23	208	UK
= 29	**Sumeria (Lydia)**	**-1**	26	317	France

Fintech Apps continued

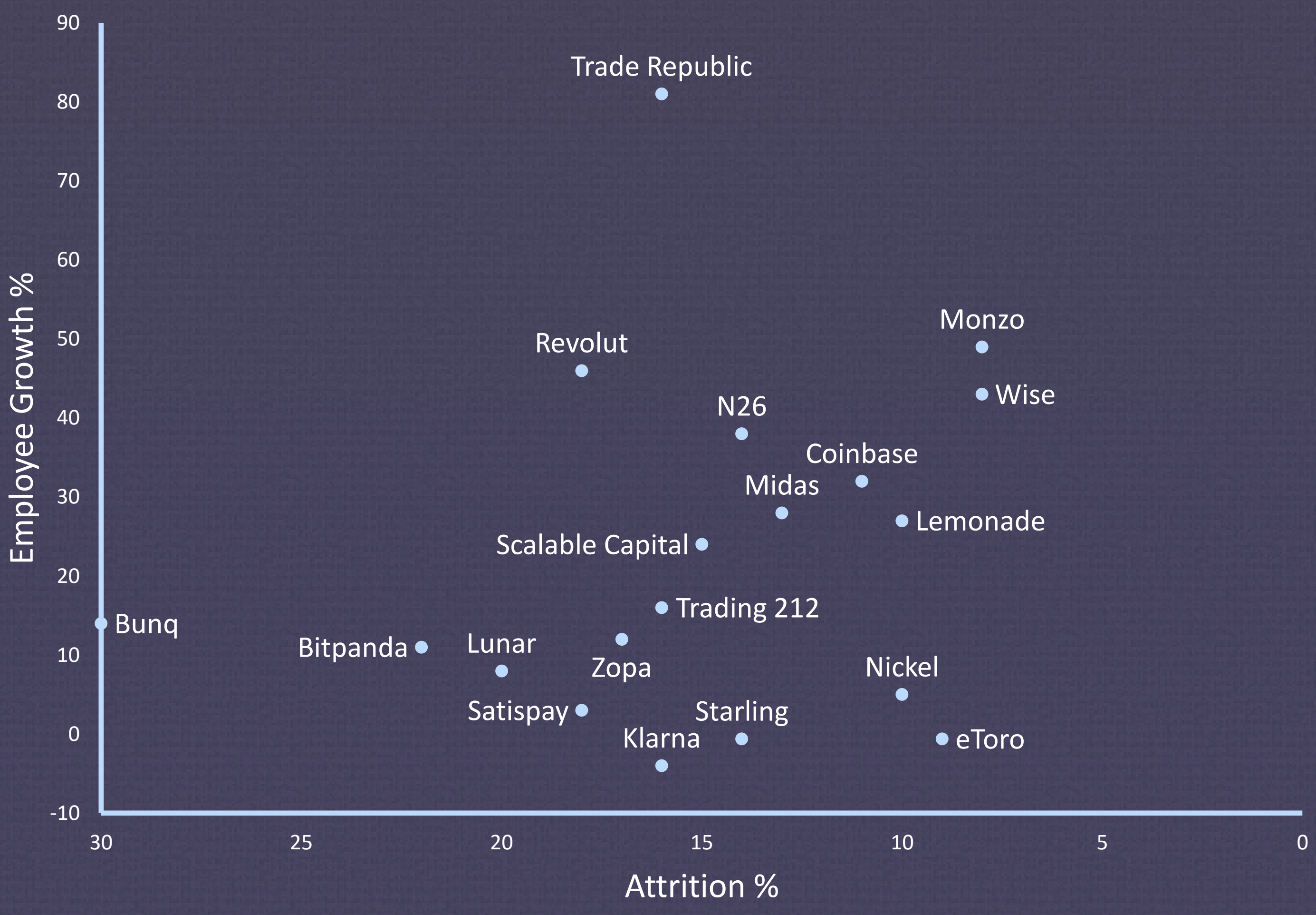
Rank	Company	Employee Growth %	Attrition %	EMEA Headcount	HQ
31	**PayBox**	-2	11	95	Israel
= 32	**Cuvva**	-3	15	94	UK
= 32	**Kroo**	-3	23	206	UK
34	**Klarna**	-4	16	2,228	Sweden
35	**Pepper**	-7	22	93	Israel
36	**Remitly**	-9	26	419	US
37	**Param**	-12	35	446	Türkiye
37	**Getsafe**	-20	38	163	Germany

Fintech Growth and Attrition

Companies with more than 500 employees

Trade Republic recorded the highest growth rate, at **81%**, despite already employing around 1,700 people. **Monzo** grew by **49%** with a workforce of more than 5,000, while **Revolut** expanded by **46%** from a base of around 7,000 employees.

Strong fintech growth is therefore not confined to smaller challengers.

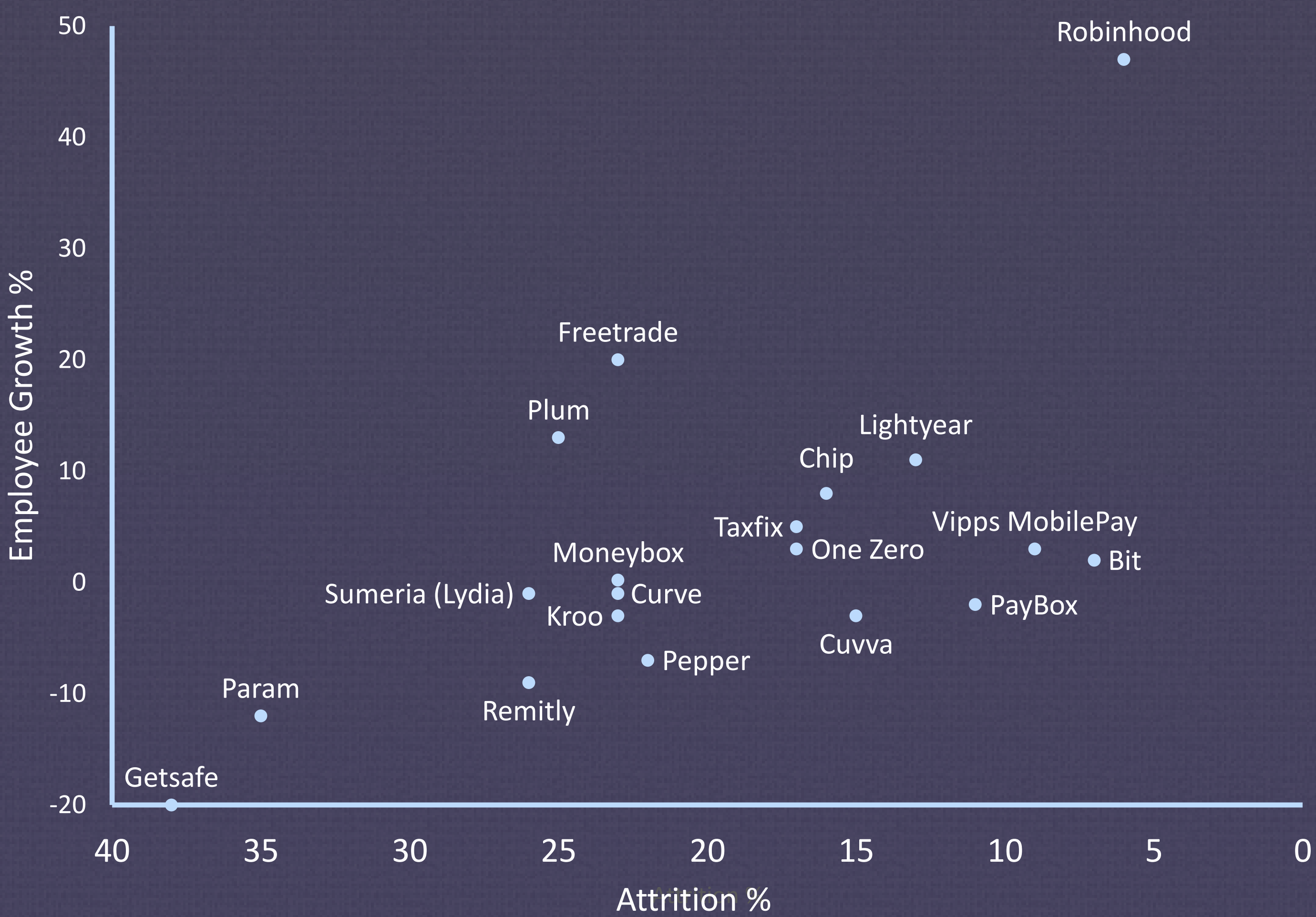


Fintech Growth and Attrition

Companies with fewer than 500 employees

Stock trading app **Robinhood** recorded the highest growth rate among smaller fintech companies, at **47%**, while maintaining a low attrition rate of 6%.

Freetrade and **Plum** also achieved double-digit growth, although both had considerably higher attrition.



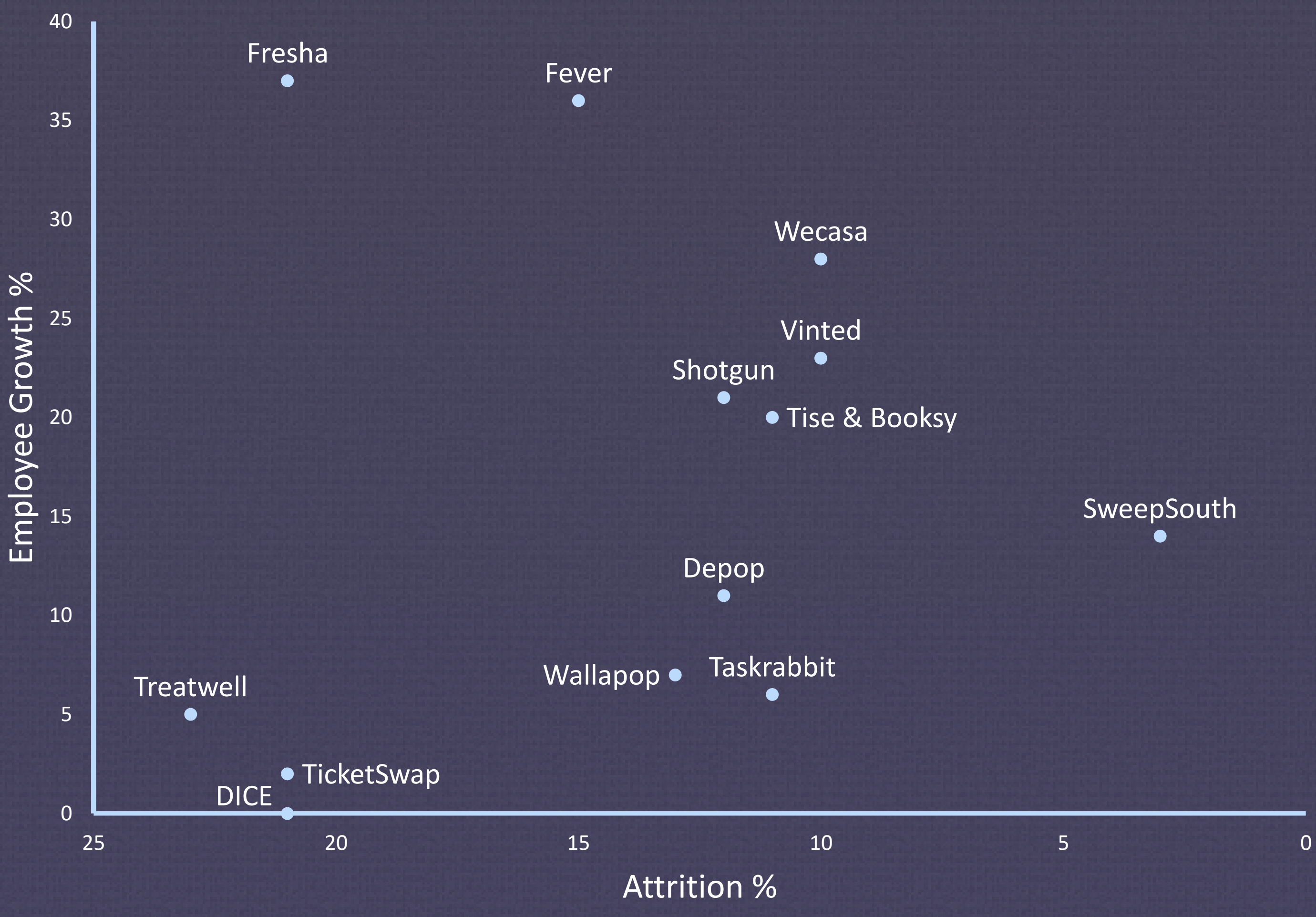
Marketplace Apps

Marketplace apps include resale, ticketing, home services and local experience platforms.

Rank	Company	Employee Growth %	Attrition %	EMEA Headcount	HQ
01	**Fresha**	**37**	21	611	UK
02	**Fever**	**36**	15	3,265	US
03	**Wecasa**	**28**	10	303	France
04	**Vinted**	**23**	10	2,121	Lithuania
05	**Shotgun**	**21**	12	98	France
06	**Tise**	**20**	11	132	Norway
07	**Booksy**	**20**	11	865	US
08	**SweepSouth**	**14**	3	589	South Africa
09	**Depop**	**11**	12	642	UK
10	**Wallapop**	**7**	13	441	Spain
11	**Taskrabbit**	**6**	11	281	US
12	**Treatwell**	**5**	23	863	UK
13	**TicketSwap**	**2**	21	179	Netherlands
14	**DICE**	**0**	21	253	UK

Marketplace Growth and Attrition

Fresha and **Fever** led the marketplace sector on employee growth, while **Wecasa** and **Vinted** combined strong expansion with comparatively low attrition.



Rides and Food Delivery Apps

Rides and food delivery apps include ride-hailing, shared mobility, parking, food delivery and online grocery platforms.

Rank	Company	Employee Growth %	Attrition %	EMEA Headcount	HQ
01	**Trendyol Go**	**54**	10	831	Türkiye
02	**Uber**	**36**	8	5,769	US
03	**DoorDash**	**34**	9	530	US
04	**Cabify**	**28**	11	1,418	Spain
05	**Deliveroo**	**21**	9	3,533	UK
06	**inDrive**	**20**	12	778	US
07	**Glovo**	**19**	10	2,669	Spain
= 08	**HungerStation**	**18**	6	4,255	Saudi Arabia
= 08	**Talabat**	**18**	7	7,175	UAE
=10	**Voi**	**15**	18	760	Sweden
=10	**Bolt**	**15**	8	3,399	Estonia
12	**Yango**	**14**	9	2,391	UAE
=13	**efood**	**13**	14	690	Greece
=13	**foodpanda**	**13**	5	1,043	Singapore
=15	**Wheely**	**12**	13	264	UK

Rides and Food Delivery Apps continued

Rank	Company	Employee Growth %	Attrition %	EMEA Headcount	HQ
=15	**BlaBlaCar**	**12**	10	1,321	France
=17	**Liftago**	**11**	4	72	Czechia
=17	**Yemeksepeti**	**11**	8	4,463	Türkiye
19	**HelloFresh**	**10**	15	6,327	Germany
=20	**Lime**	**9**	12	480	US
=20	**Heetch**	**9**	14	627	France
=22	**Foodhub**	**8**	11	275	UK
=22	**Marti**	**8**	17	862	Türkiye
=22	**Wolt**	**8**	19	11,906	Finland
=25	**Foody**	**7**	14	130	Cyprus
=25	**Oda**	**7**	12	772	Norway
=27	**iTaxi**	**5**	14	92	Poland
=27	**Rohlik.cz**	**5**	14	572	Czechia
=27	**Freenow**	**5**	7	1,351	Germany
=30	**BiTaksi**	**4**	21	128	Türkiye

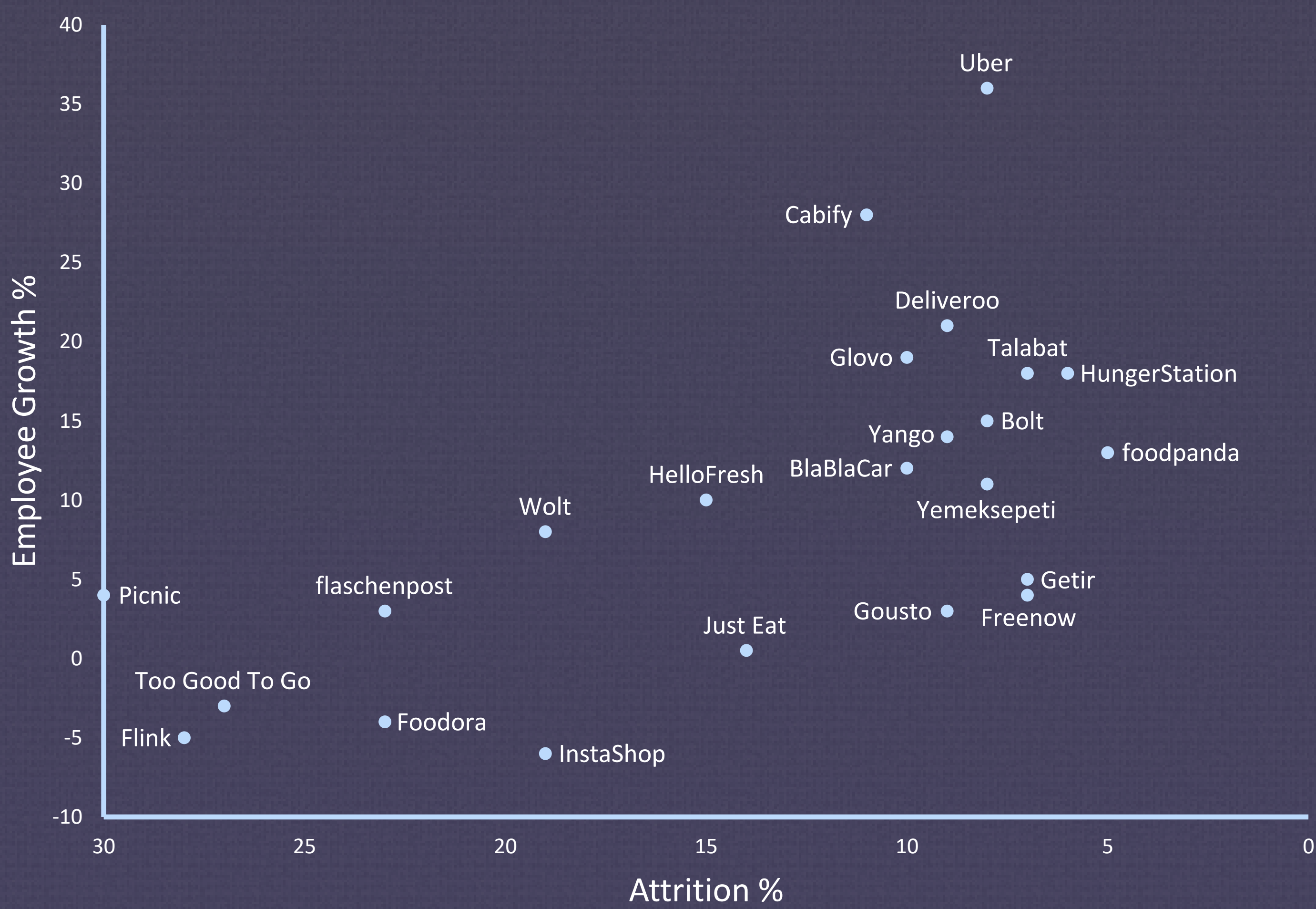
Rides and Food Delivery Apps continued

Rank	Company	Employee Growth %	Attrition %	EMEA Headcount	HQ
=30	**Zapp**	**4**	13	330	UK
=30	**Picnic**	**4**	30	5,246	Netherlands
=30	**Getir**	**4**	7	6,208	Türkiye
=34	**Geopuff**	**3**	15	536	US
=34	**Gousto**	**3**	9	1,060	UK
=34	**flaschenpost**	**3**	23	1,312	Germany
37	**Everli**	**2**	9	175	Italy
38	**Just Eat**	**0.5**	14	10,033	Netherlands
39	**Dott**	**-0.2**	22	586	Germany
40	**LeCab**	**-2**	8	64	France
41	**TooGoodToGo**	**-3**	27	1,296	Denmark
42	**Foodora**	**-4**	23	2,449	Sweden
43	**Flink**	**-5**	28	2,414	Germany
44	**InstaShop**	**-6**	19	1,485	UAE
45	**Lyfy**	**-8**	27	421	US

Rides & Food Delivery Growth and Attrition

Companies with more than 1000 employees

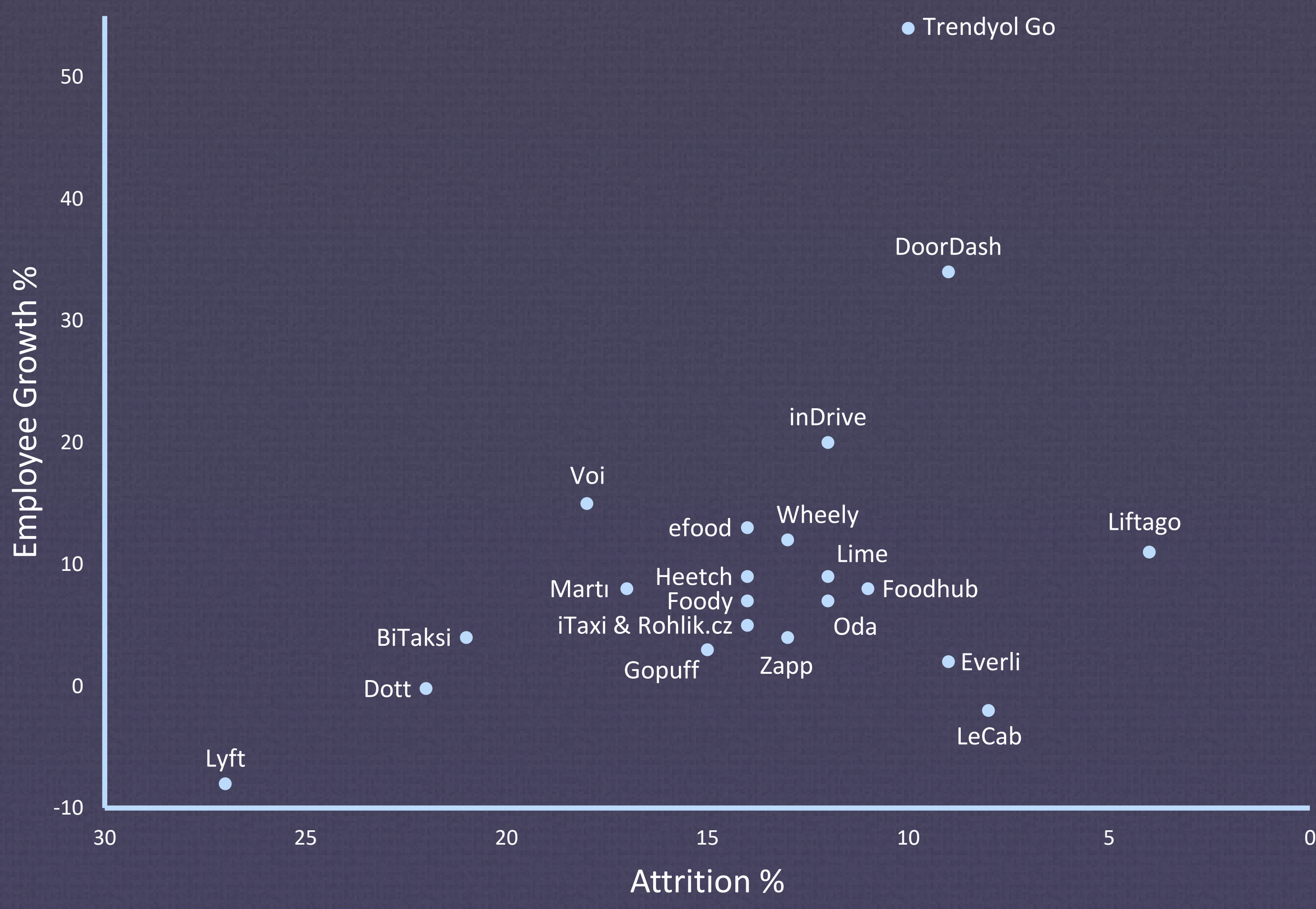
Uber led the largest rides and food delivery companies with **36%** employee growth, while **Cabify** also expanded rapidly at 28%. Several other major platforms - including **Deliveroo**, **Glovo** and **Talabat**, also recorded double-digit growth.



Rides & Food Delivery Growth and Attrition

Companies with fewer than 1000 employees

Trendyol Go recorded the highest employee growth among rides and food delivery companies with fewer than 1,000 employees, at **54%**, followed by **DoorDash** at **34%**.



Security Apps

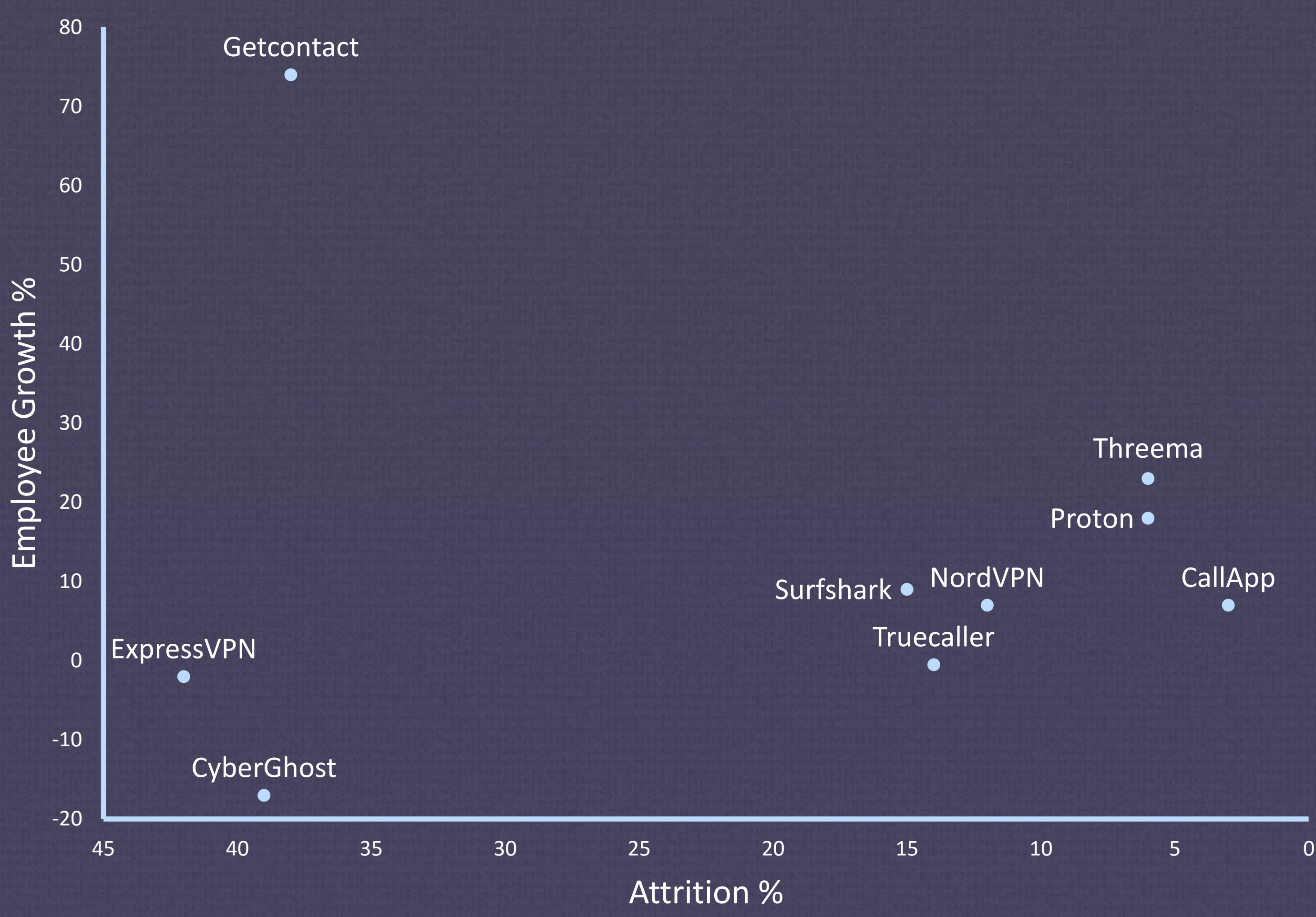
Security apps include VPNs, secure communication tools, caller identification and spam protection services.

Rank	Company	Employee Growth %	Attrition %	EMEA Headcount	HQ
01	**Getcontact**	**74**	38	40	Türkiye
02	**Threema**	**23**	6	53	Switzerland
03	**Proton**	**18**	6	604	Switzerland
04	**Surfshark**	**9**	15	483	Netherlands
= 05	**CallApp**	**7**	3	148	Israel
= 05	**NordVPN**	**7**	12	1,754	Lithuania
07	**Truecaller**	**-0.5**	14	213	Sweden
08	**ExpressVPN**	**-2**	42	90	British Virgin Islands
09	**CyberGhost**	**-17**	39	40	Romania

Security Growth and Attrition

Getcontact achieved exceptional employee growth, although this was accompanied by the highest attrition rate in the sector.

By contrast, **Threema** and **Proton** combined strong growth with much lower employee turnover.



Spotlight: Proton

Founded by CERN scientists in 2014, Proton has grown from an encrypted email service into Europe's leading privacy-focused productivity platform, offering secure alternatives to products from Google and Microsoft. It has since expanded into a wider ecosystem of privacy-focused digital services and is well known for its VPN product .

Proton

Founded **2014** EMEA headcount **604**

Employee growth **18%** HQ **Switzerland**

Mail & Calendar

Proton Mail

Proton Calendar

AI Assistant

lumo by Proton

Cloud

Proton Docs

Proton Drive

Proton Workspace

Proton Sheets

Privacy & Security

Proton VPN

Proton Pass

Proton Wallet

Social Apps

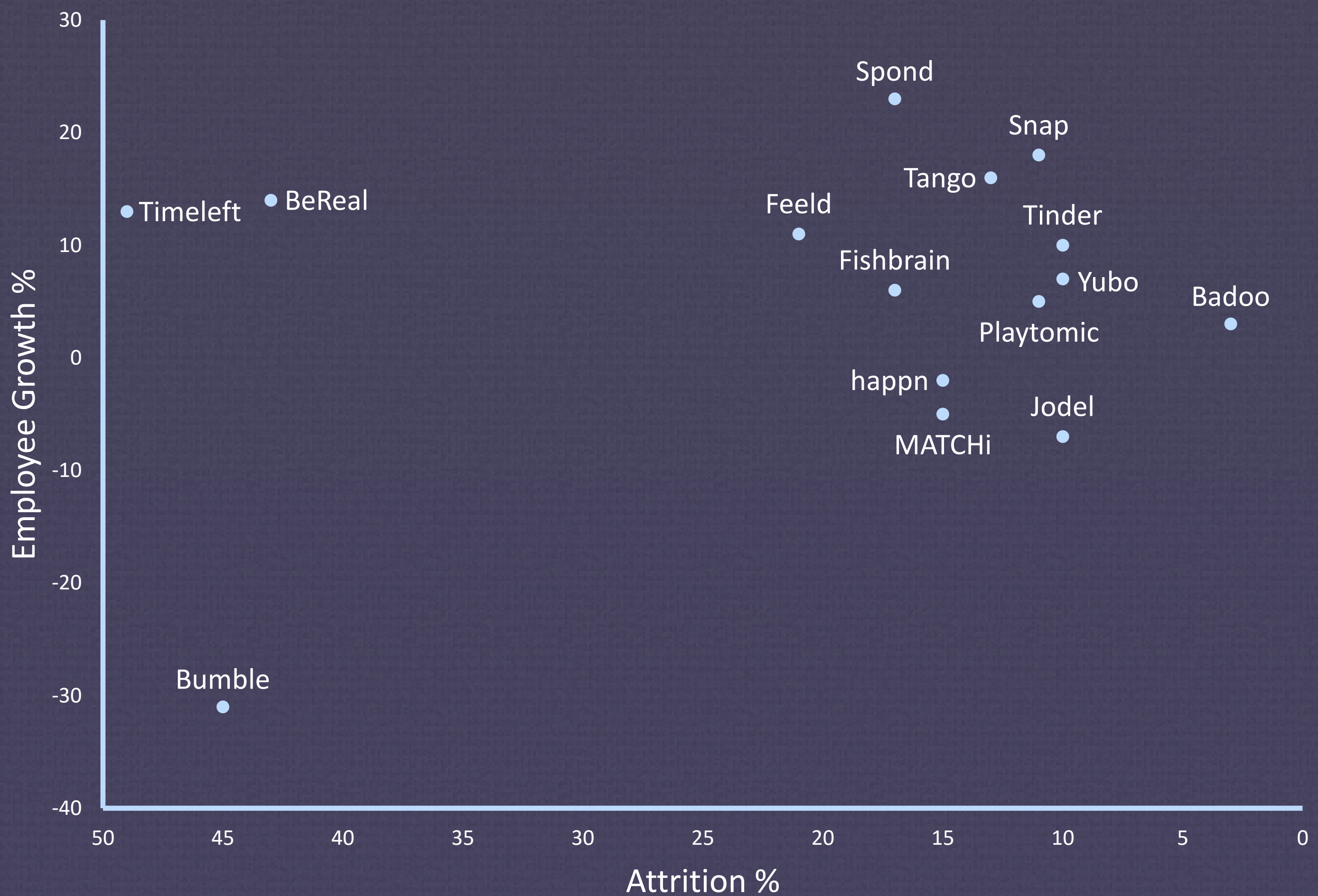
Social apps include dating, social networking and community platforms.

Rank	Company	Employee Growth %	Attrition %	EMEA Headcount	HQ
01	**Spond**	**23**	17	59	Norway
02	**Snap**	**18**	11	1,572	US
03	**Tango**	**16**	13	559	US
04	**BeReal**	**14**	43	95	France
05	**Timeleft**	**13**	49	52	France
06	**Feeld**	**11**	21	81	UK
07	**Tinder**	**10**	10	222	US
08	**Yubo**	**7**	10	101	France
09	**Fishbrain**	**6**	17	56	Sweden
10	**Playtomic**	**5**	11	240	Spain
11	**Badoo**	**3**	3	195	UK
12	**happn**	**-2**	15	98	France
13	**MATCHi**	**-5**	15	73	Sweden
14	**Jodel**	**-7**	10	113	Germany
15	**Bumble**	**-31**	45	496	US

Social Growth and Attrition

Sports team management platform **Spond** recorded the highest employee growth in the category, at **23%**, followed by **Snap** (18%) and **Tango** (16%).

Bumble was the clear negative outlier, with employee headcount declining by 31%.



Travel Apps

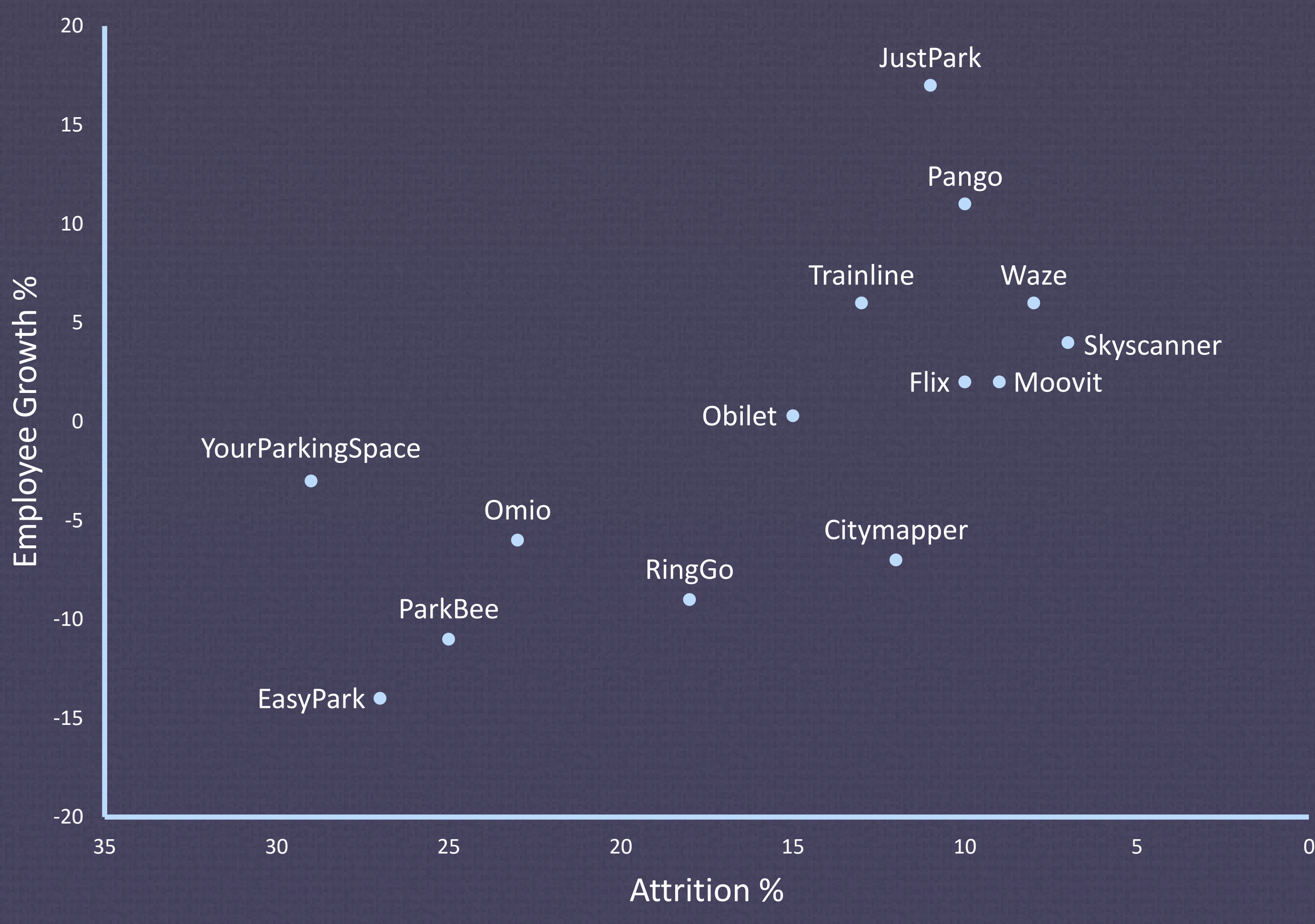
Travel apps include journey planning, transport booking, travel search and parking services.

Rank	Company	Employee Growth %	Attrition %	EMEA Headcount	HQ
01	**JustPark**	**17**	11	108	UK
02	**Pango**	**11**	10	159	Israel
= 03	**Trainline**	**6**	13	1,065	UK
= 03	**Waze**	**6**	8	229	Israel
05	**Skyscanner**	**4**	7	1,348	UK
06	**Moovit**	**2**	9	251	Israel
07	**Flix**	**2**	10	1,995	Germany
08	**Obilet**	**0.3**	15	347	Türkiye
09	**YourParkingSpace**	**-3**	29	127	UK
10	**Omio**	**-6**	23	365	Germany
11	**Citymapper**	**-7**	12	40	UK
12	**RingGo**	**-9**	18	74	UK
13	**ParkBee**	**-11**	25	63	Netherlands
14	**EasyPark**	**-14**	27	414	Sweden

Travel Growth and Attrition

JustPark recorded the highest employee growth in the category, at 17%, followed by Pango at 11%.

Travel was the weakest-performing sector in the report, with six of the 14 companies analysed recording a decline in employee headcount.



Wellness Apps

Wellness apps encompass digital products focused on improving physical health, mental wellbeing and healthier lifestyles.

Rank	Company	Employee Growth %	Attrition %	EMEA Headcount	HQ
01	**Yuka**	**24**	5	123	France
02	**Clue**	**14**	7	112	Germany
03	**Strava**	**10**	13	159	US
= 04	**Calm**	**8**	7	142	US
= 04	**Headspace**	**8**	3	155	US
= 04	**Hiwell**	**8**	22	675	Türkiye
= 04	**Doctolib**	**8**	14	3,284	France
08	**YAZIO**	**6**	11	135	Germany
= 09	**Meditopia**	**5**	23	148	Türkiye
= 09	**Unobravo**	**5**	4	2,175	Italy
11	**Doktor.se**	**2**	14	311	Sweden
12	**Mindler**	**1**	19	282	Sweden
13	**Docplanner**	**0.4**	16	832	Netherlands
=14	**Flo Health**	**0.3**	18	581	UK
=14	**Kry/Livi**	**0.3**	15	735	Sweden

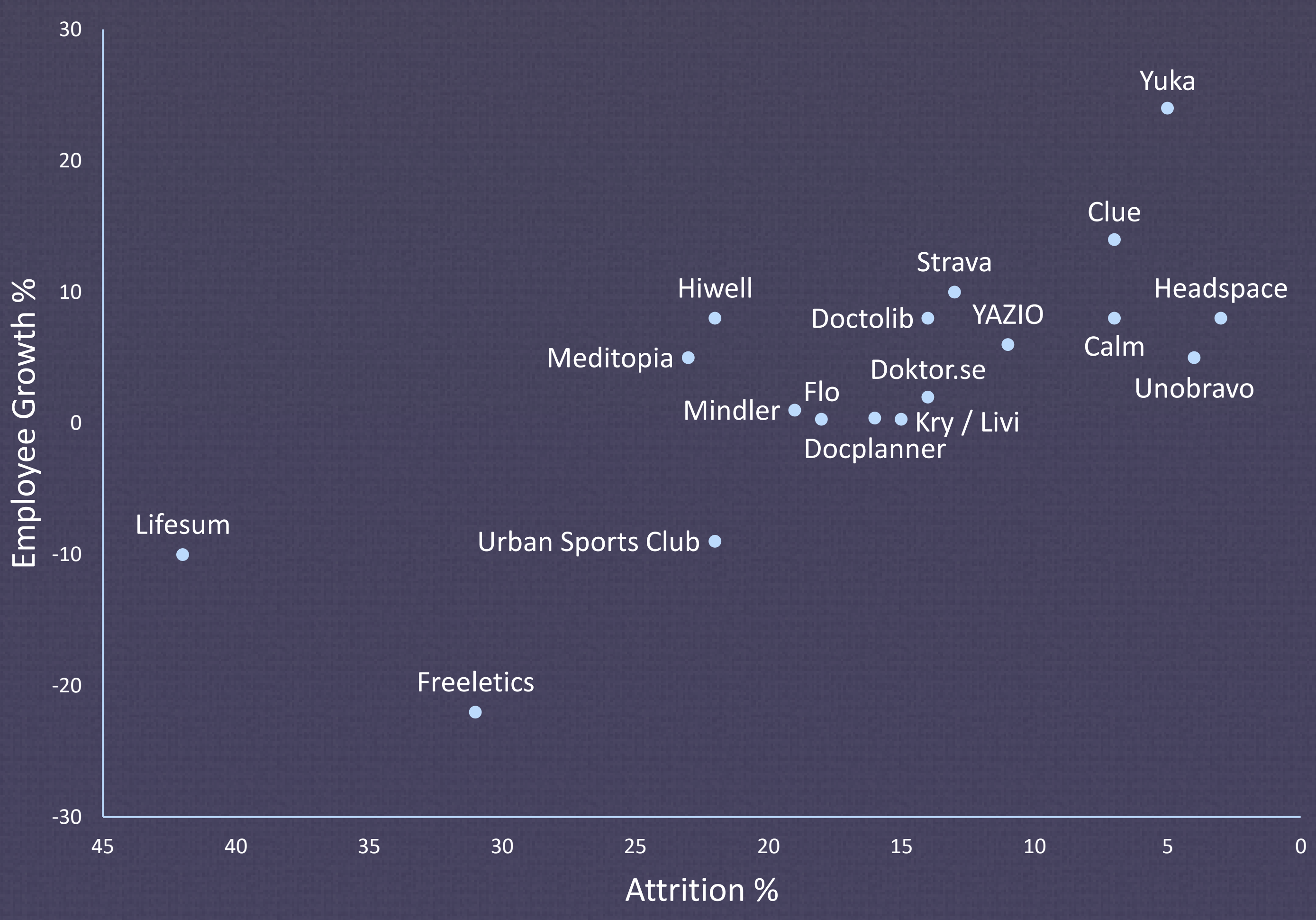
Wellness Apps continued

Rank	Company	Employee Growth %	Attrition %	EMEA Headcount	HQ
16	**Urban Sports Club**	**-9**	22	399	Germany
17	**Lifesum**	**-10**	42	43	Sweden
18	**Freeletics**	**-22**	31	78	Germany

Wellness Growth and Attrition

Food and cosmetics scanning app **Yuka** recorded the highest employee growth in the category, at **24%,** followed by period tracking app **Clue** at 14% and fitness tracking app **Strava** at 10%.

Freeletics had a particularly challenging year, with headcount declining by 22% and attrition reaching 31%.



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