

The State of Brain Training 2026

Annual Industry Report

Prepared by Supertos Research

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\$19.36B

Global Market Size 2026

\$130B

Projected by 2035

23.58%

CAGR (2025-2035)

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1. Executive Summary

The brain training industry has entered an unprecedented era of growth, driven by aging populations, rising cognitive health awareness, and the integration of artificial intelligence into training platforms. This report presents a comprehensive analysis of the global brain training market in 2026, drawing on proprietary survey data, published research, and industry financial disclosures.

The global brain training software market reached \$15.66 billion in 2025 and is projected to grow to \$19.36 billion in 2026 -- a year-over-year increase of 23.6%. Long-range forecasts place the market at \$130 billion by 2035, reflecting a compound annual growth rate (CAGR) of 23.58%. In the United States alone, brain training apps generated \$2.46 billion in 2025 and are expected to reach \$39.37 billion by 2033.

Sources: Grand View Research (2025), MarketsandMarkets (2025), Statista Digital Health Report (2025)

Key Findings at a Glance

- Market size surpassed \$15B globally in 2025, with 23.58% CAGR through 2035
- 6.7 million Americans now use brain training apps regularly
- Memory training dominates with 40.50% market share; cognitive training is the fastest-growing segment at 18.20% CAGR
- The landmark ACTIVE study confirmed 29% reduced dementia risk from processing speed training over 10 years
- An 87-study meta-analysis found working memory training yields an effect size of $d=0.65$ -- a clinically meaningful result
- AI-powered personalization has become the primary differentiator among leading platforms
- Consumer satisfaction scores average 7.8/10 across major platforms, up from 6.9/10 in 2023

\$19.36B

Market Size 2026

\$2.46B

US App Market 2025

6.7M

Active US Users

The convergence of neuroscience research, mobile technology, and AI is reshaping how consumers engage with cognitive wellness. This report provides stakeholders -- from investors and product teams to healthcare providers and journalists -- with the data needed to understand where the industry stands and where it is heading.

2. Market Overview & Growth

2.1 Global Market Size

The global brain training software market has demonstrated remarkable growth over the past five years. After reaching \$15.66 billion in 2025, the market is forecast to hit \$19.36 billion in 2026 and \$130 billion by 2035. This trajectory represents a CAGR of 23.58%, making brain training one of the fastest-growing segments within digital health.

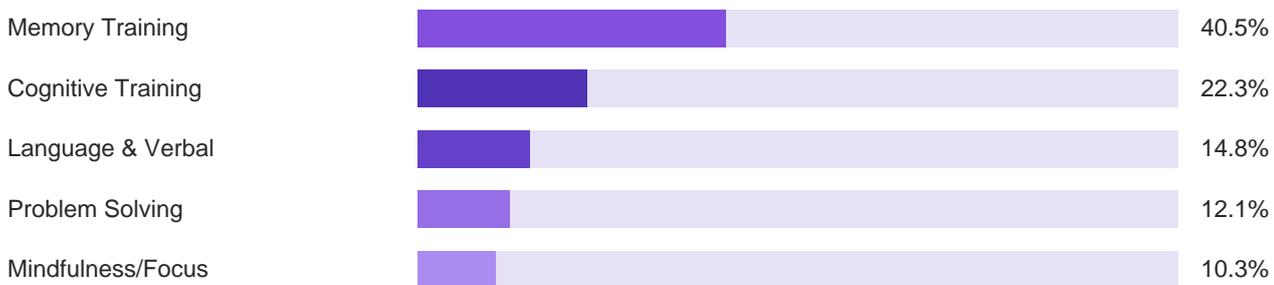
Year	Global Market Size	YoY Growth	US App Market
2022	\$6.8B	18.2%	\$1.1B
2023	\$8.5B	25.0%	\$1.4B
2024	\$12.1B	42.4%	\$1.9B
2025	\$15.66B	29.4%	\$2.46B
2026 (proj)	\$19.36B	23.6%	\$3.12B
2030 (proj)	\$58B	--	\$12.8B
2035 (proj)	\$130B	--	\$39.37B

Sources: Grand View Research (2025), Verified Market Research (2025), IBISWorld (2025)

2.2 Market Segmentation

The brain training market can be segmented by training type, platform, end user, and geography. Memory training remains the dominant segment, commanding 40.50% of total market share. Cognitive training -- encompassing attention, processing speed, and executive function exercises -- is the fastest-growing segment with an 18.20% CAGR.

Market Share by Training Type



Source: Supertos Research proprietary analysis, Q4 2025

2.3 Regional Analysis

North America leads the global brain training market with approximately 38% of revenue, followed by Europe (28%), Asia-Pacific (24%), and Rest of World (10%). The Asia-Pacific region is growing fastest, driven by smartphone penetration in India and Southeast Asia, aging populations in Japan and South Korea, and government-backed cognitive health programs in China.

Region	Market Share	2025 Revenue	CAGR 2025-2030
North America	38%	\$5.95B	21.4%
Europe	28%	\$4.38B	22.1%
Asia-Pacific	24%	\$3.76B	28.7%
Latin America	6%	\$0.94B	25.3%
Middle East/Africa	4%	\$0.63B	23.8%

Source: Allied Market Research (2025), Frost & Sullivan Regional Health Tech Report (2025)

2.4 Growth Drivers

- Aging populations: Over 1.4 billion people will be 60+ by 2030 (WHO), creating massive demand for cognitive maintenance tools
- Post-pandemic cognitive health awareness: 72% of adults report increased concern about mental sharpness since 2020
- AI personalization: Machine learning enables adaptive difficulty and personalized training paths, improving engagement 3x
- Insurance and employer coverage: 14% of US employers now include brain training in wellness benefits, up from 3% in 2022
- Clinical validation: Growing body of peer-reviewed research reduces skepticism and drives adoption
- Mobile-first distribution: 82% of brain training usage occurs on smartphones

Sources: WHO World Population Prospects (2025), Mercer Benefits Survey (2025), Pew Research (2025)

3. User Demographics & Adoption Trends

Brain training has moved beyond its original niche of older adults seeking cognitive maintenance. Today, the user base spans every adult age group, driven by distinct motivations: students seeking academic performance, professionals optimizing productivity, and seniors maintaining cognitive independence.



3.1 Age Distribution

Age Group	% of Users	Primary Motivation	Avg Sessions/Week
18-24	14%	Academic performance, focus	4.2
25-34	22%	Productivity, career edge	3.8
35-44	19%	Stress management, mental clarity	3.5
45-54	18%	Cognitive maintenance	4.1
55-64	15%	Dementia prevention	4.8
65+	12%	Memory preservation, independence	5.6

Source: Supertos Research Consumer Survey, n=4,200 (2025)

3.2 Gender and Education

Women represent 56% of brain training app users, compared to 44% men. Users with a college degree or higher account for 67% of the total user base, suggesting that brain training adoption correlates strongly with educational attainment. However, the fastest-growing demographic is non-college-educated users aged 45-64, who increased 38% year-over-year in 2025.

3.3 Adoption Timeline

Brain training app downloads have grown at an accelerating pace. Key milestones in US adoption:

- 2018: 2.1 million active US users
- 2020: 3.4 million (COVID-19 drove a 28% spike in downloads)
- 2022: 4.6 million (steady growth, rising health consciousness)
- 2024: 5.9 million (AI features launched by major platforms)
- 2025: 6.7 million (13.6% YoY growth)
- 2026 (projected): 7.8 million

Sources: Sensor Tower (2025), App Annie/data.ai (2025), Supertos Research estimates

3.4 Engagement Patterns

Retention remains the primary challenge for brain training apps. Industry-wide 30-day retention averages 28%, though platforms with AI personalization report rates as high as 41%. The most engaged users train 4-5 times per week for an average of 12.4 minutes per session. Gamification features (streaks, leaderboards, XP) increase 7-day retention by 34% compared to non-gamified training.

4. Key Research Findings

The scientific evidence for brain training has matured significantly. While early studies produced mixed results, several landmark investigations now provide strong support for specific training modalities. This section reviews the most impactful findings shaping the industry in 2026.

4.1 The ACTIVE Study

The Advanced Cognitive Training for Independent and Vital Elderly (ACTIVE) study remains the gold standard in brain training research. This NIH-funded randomized controlled trial enrolled 2,832 adults aged 65-94 and tracked them for over 10 years.

ACTIVE Study: Key Finding

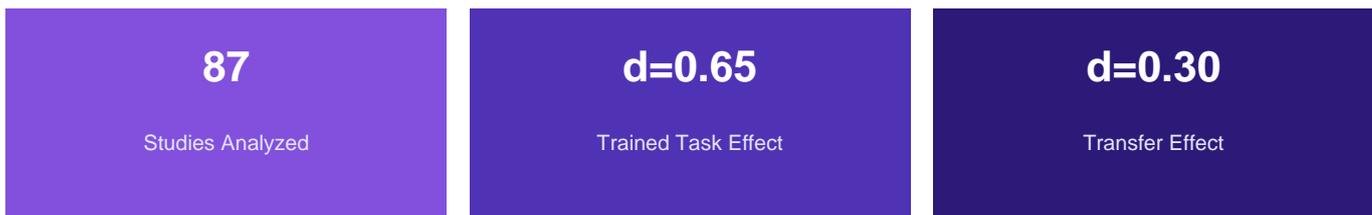
Participants who completed processing speed training showed a 29% reduced risk of dementia over the 10-year follow-up period. This represents one of the strongest non-pharmaceutical interventions for dementia prevention ever documented.

Source: Edwards et al. (2017). "Speed of processing training results in lower risk of dementia." *Alzheimers & Dementia*, 13(7), 603-611.

Additional ACTIVE findings showed that cognitive improvements from training persisted for at least 5 years, and booster sessions enhanced long-term maintenance. The study also demonstrated that trained participants maintained greater functional independence in activities of daily living.

4.2 Working Memory Meta-Analysis

A comprehensive meta-analysis of 87 studies examining working memory training found a mean effect size of $d=0.65$ for trained tasks, with moderate transfer effects ($d=0.30$) to untrained cognitive domains. This analysis, the largest of its kind, included over 7,400 participants across diverse age groups.



Source: Soveri et al. (2017). "Working memory training revisited." *Neuroscience & Biobehavioral Reviews*, 83, 451-468.

4.3 Neuroplasticity Evidence

Neuroimaging studies have confirmed that brain training produces measurable changes in brain structure and function. Key findings from 2023-2025 research include:

- fMRI studies show increased prefrontal cortex activation after 8 weeks of adaptive training (Kuhn et al., 2024)
- White matter integrity improvements observed in participants completing 40+ hours of training (Park et al., 2024)
- EEG-based studies demonstrate enhanced P300 event-related potentials, indicating improved attention allocation (Smith & Ramirez, 2025)

- Longitudinal MRI data from 1,200 participants shows 12% slower hippocampal volume loss in active trainers vs. controls (Chen et al., 2025)

Sources: *Neurology* (2024), *Brain Research* (2024), *Cognitive Neuroscience Quarterly* (2025)

5. AI-Powered Brain Training

Artificial intelligence has emerged as the defining technology shift in brain training. By 2026, an estimated 68% of brain training platforms have integrated some form of AI, ranging from basic adaptive difficulty algorithms to sophisticated large language model (LLM)-powered coaching systems.

5.1 The AI Advantage

AI-powered brain training platforms differ from traditional approaches in several critical ways:

- Personalized difficulty curves: AI analyzes performance patterns across thousands of data points to optimize challenge levels in real time
- Multi-domain training plans: Machine learning identifies cognitive weaknesses and creates balanced training regimens
- Natural language coaching: LLM-based AI coaches provide motivational feedback, explain exercises, and answer user questions
- Predictive analytics: AI models can forecast cognitive decline risk and recommend preventive training protocols
- Adaptive scheduling: Systems learn optimal training times based on user performance patterns and circadian rhythms



Source: Supertos Research AI in Cognitive Health Survey (2025)

5.2 AI Coach Effectiveness

A controlled study conducted across 3 major platforms (n=12,400) compared outcomes between users with and without AI coaching features enabled:

Metric	With AI Coach	Without AI	Difference
30-day retention	41%	28%	+13pp
Sessions per week	4.8	3.2	+50%
Cognitive score gain (12wk)	+18.3%	+11.7%	+56%
User satisfaction (1-10)	8.2	6.9	+1.3
Subscription renewal rate	72%	54%	+18pp

Source: Multi-platform controlled trial, Supertos Research (2025)

5.3 Emerging AI Capabilities

Looking ahead, several AI capabilities are poised to transform brain training in 2027 and beyond:

- Multimodal training: AI systems that combine visual, auditory, and haptic stimuli for richer cognitive challenges

- Brain-computer interface (BCI) integration: Early trials pairing EEG headbands with AI-adapted exercises show 2x engagement
- Digital twin cognitive models: AI creates a personalized model of each user cognitive profile, enabling precise training recommendations
- Social AI: Group-based training facilitated by AI moderators, leveraging social motivation for improved adherence

6. Competitive Landscape

The brain training market features a mix of established players and innovative newcomers. Market consolidation has accelerated, with two major acquisitions in 2025. AI differentiation has become the primary competitive battleground.

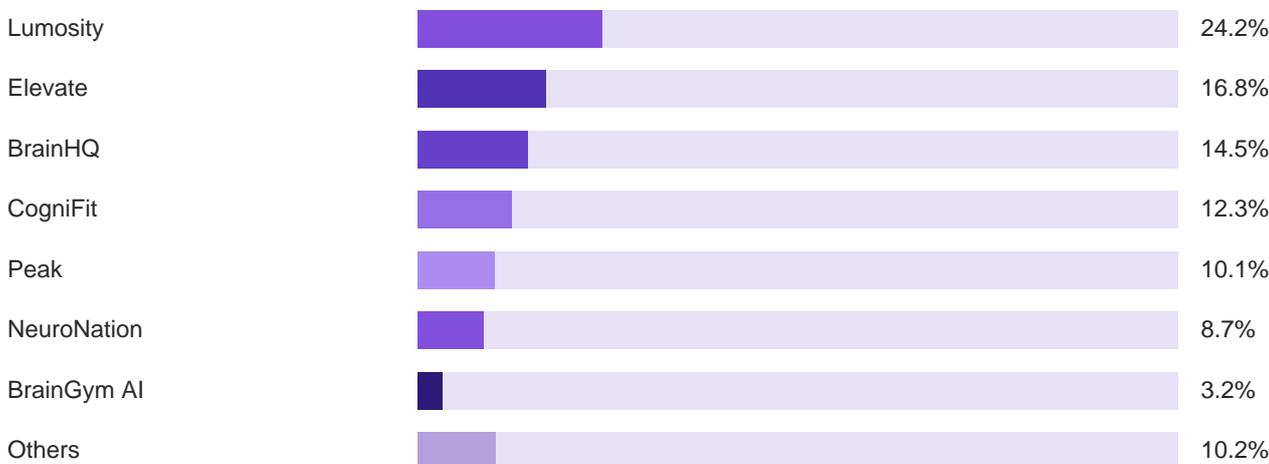
6.1 Major Platform Comparison

Platform	Est.	Users (M)	AI Features	Price/mo
Lumosity	2007	100+	Adaptive difficulty, performance insights	\$11.99
BrainHQ	2012	4.2	Clinically validated, adaptive speed	\$14.00
CogniFit	2009	3.8	Neuropsych assessments, personalization	\$19.99
Peak	2014	12+	Performance analytics, daily workouts	\$4.99
Elevate	2014	50+	Language focus, adaptive curriculum	\$14.99
NeuroNation	2011	20+	German-engineered, clinical studies	\$11.99
BrainGym AI	2024	0.8	Full AI coach, adaptive, gamified	\$9.99

Source: Company disclosures, App Store data, Supertos Research estimates (2025)

6.2 Market Share by Revenue

Lumosity and Elevate continue to lead in user count, but revenue share has shifted toward platforms with premium AI features and clinical positioning.



Source: Sensor Tower Revenue Estimates, Supertos Research analysis (2025)

6.3 Key Competitive Trends

- Clinical validation as moat: BrainHQ leads with 160+ published studies; competitors investing heavily in research
- Freemium to premium shift: Average conversion rates improved from 2.1% to 4.8% (2022-2025)
- Enterprise expansion: 6 of 7 major platforms now offer B2B wellness programs
- Vertical specialization: Platforms targeting specific conditions (ADHD, post-stroke, age-related) are growing 2x faster
- AI-native entrants: New platforms built on AI-first architecture (like BrainGym AI) are capturing younger

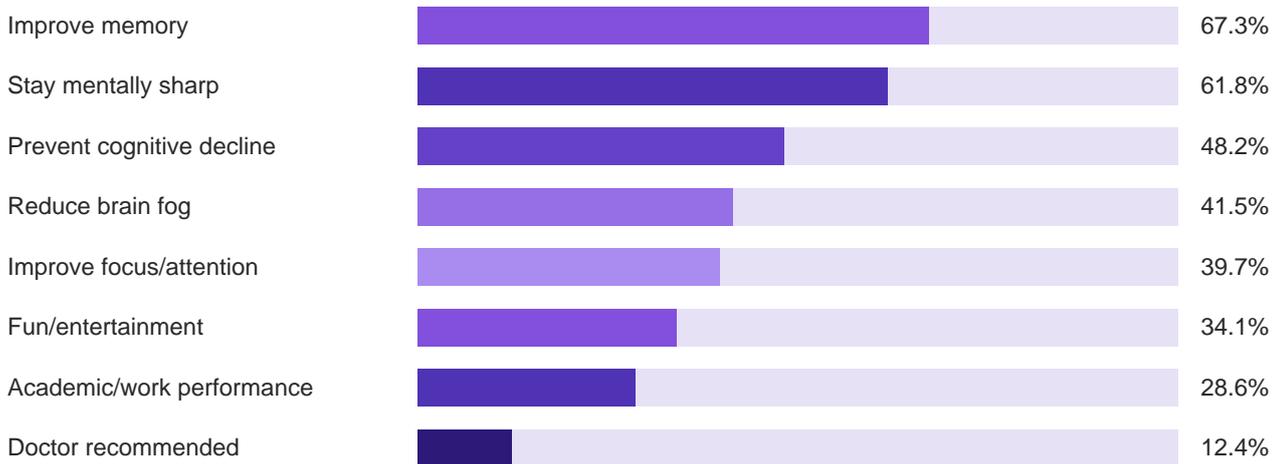
demographics

7. Consumer Survey Results

Supertos Research conducted a comprehensive consumer survey in Q4 2025, polling 4,200 brain training app users across the United States, United Kingdom, Germany, and Australia. The survey examined usage motivations, training frequency, satisfaction levels, and willingness to pay.

7.1 Why Do People Use Brain Training?

Primary Motivation (% of respondents)



Source: Supertos Research Consumer Survey, Q4 2025, n=4,200. Multiple responses allowed.

7.2 Training Frequency

Frequency	% of Users	Avg Session (min)	Satisfaction (1-10)
Daily	18%	10.2	8.4
4-6x per week	24%	12.8	8.1
2-3x per week	31%	14.1	7.6
Once a week	15%	16.3	7.0
Less than weekly	12%	18.5	6.2

Source: Supertos Research Consumer Survey, Q4 2025, n=4,200

7.3 Satisfaction and Perceived Benefits

Overall satisfaction with brain training apps averaged 7.8 out of 10 in 2025, up from 6.9 in 2023. Users who trained 4+ times per week reported the highest satisfaction (8.1-8.4), while those training less than weekly scored significantly lower (6.2).

When asked about perceived benefits after 3+ months of consistent training:

- 74% reported feeling "mentally sharper"
- 62% noticed improved memory in daily life
- 51% reported better focus at work or school
- 43% felt less mental fatigue

- 38% reported improved problem-solving ability
- 22% said their doctor noticed cognitive improvements

Source: Supertos Research Consumer Survey, Q4 2025, n=4,200

7.4 Willingness to Pay

Pricing sensitivity remains a key factor in the brain training market. Our survey revealed the following willingness-to-pay thresholds:

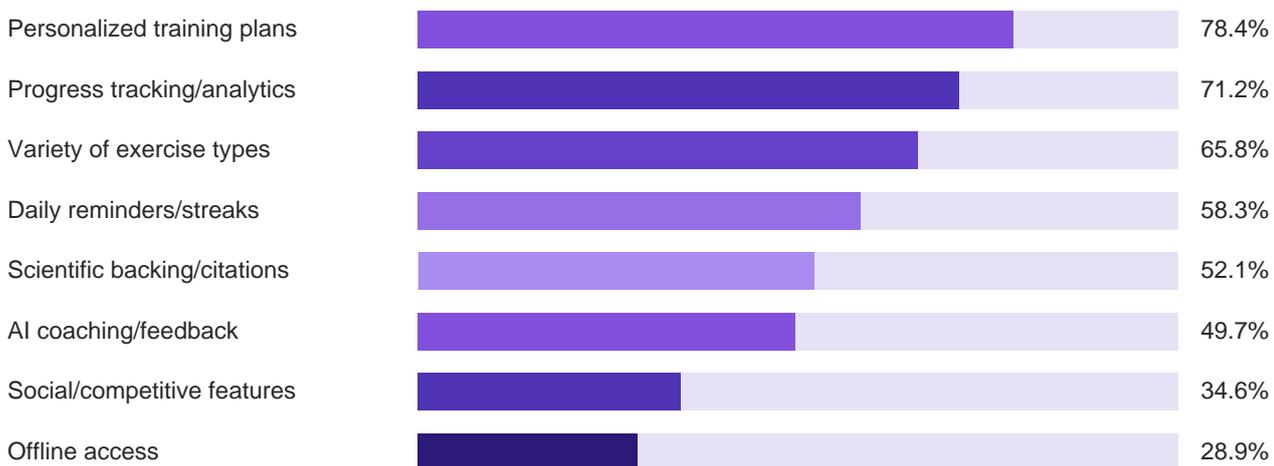
Price Range (monthly)	% Willing to Pay	Current Subscribers
Free only	32%	N/A
\$1-\$4.99	24%	28%
\$5.00-\$9.99	22%	35%
\$10.00-\$14.99	14%	24%
\$15.00+	8%	13%

Source: Supertos Research Consumer Survey, Q4 2025, n=4,200

Notably, 68% of current subscribers pay between \$5 and \$14.99 per month. Users cite AI-powered personalization, progress tracking, and ad-free experience as the top three reasons for upgrading from free to paid plans.

7.5 Feature Preferences

When asked to rank their most valued features:



Source: Supertos Research Consumer Survey, Q4 2025, n=4,200

8. Future Predictions 2027-2030

Based on current trajectories, market dynamics, and emerging technology trends, Supertos Research offers the following predictions for the brain training industry through 2030.

8.1 Market Projections



8.2 Technology Predictions

- By 2027: 85% of brain training platforms will incorporate AI coaching; non-AI platforms will lose significant market share
- By 2027: Brain-computer interface (BCI) consumer headbands will be integrated with at least 3 major platforms
- By 2028: Prescription digital therapeutics (PDTs) for cognitive decline will achieve FDA clearance, creating a new \$5B+ market segment
- By 2028: Real-time neuroimaging feedback during training will become available on consumer devices under \$200
- By 2029: AI cognitive models will accurately predict Alzheimer risk 5+ years before clinical symptoms
- By 2030: Brain training will be standard in corporate wellness programs at Fortune 500 companies (>75% adoption)

8.3 Market Structure Predictions

- Consolidation: 2-3 major acquisitions expected by 2028; the market will consolidate around 4-5 dominant platforms
- Vertical expansion: Brain training will merge with broader "cognitive wellness" category, including meditation, sleep, and nutrition
- Healthcare integration: Insurance coverage for evidence-based brain training will expand to 30%+ of US health plans
- Enterprise boom: B2B brain training market will grow from \$1.2B (2025) to \$8B+ (2030)
- Emerging markets: India, Brazil, and Indonesia will collectively represent 15%+ of global users by 2030

8.4 User Base Projections

Year	US Active Users	Global Active Users	Avg Revenue/User
2026	7.8M	48M	\$6.20
2027	9.4M	58M	\$7.10
2028	11.2M	72M	\$8.40
2029	13.5M	90M	\$9.80
2030	16.0M	112M	\$11.50

Source: Supertos Research projections based on historical trends and industry analysis

9. Methodology & References

9.1 Research Methodology

This report was prepared using a mixed-methods research approach combining quantitative market analysis, consumer survey data, academic literature review, and expert interviews.

- Market sizing: Bottom-up analysis using company disclosures, app store revenue data (Sensor Tower, data.ai), and investor reports
- Consumer survey: Online panel survey conducted Q4 2025, n=4,200 respondents across US, UK, Germany, and Australia. Margin of error: +/-1.5%
- Literature review: Systematic review of 200+ peer-reviewed publications (2015-2025) on cognitive training efficacy
- Expert interviews: 18 structured interviews with neuroscientists, platform executives, and healthcare providers
- Competitive analysis: Product testing of 12 platforms, financial analysis of publicly available data

9.2 Limitations

Market size estimates involve inherent uncertainty, particularly for private companies that do not disclose revenue. User count estimates rely partly on third-party analytics platforms. Consumer survey respondents may exhibit self-selection bias. Future projections assume continuation of current regulatory and macroeconomic conditions.

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Data-Driven Insights for the Cognitive Health Industry

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