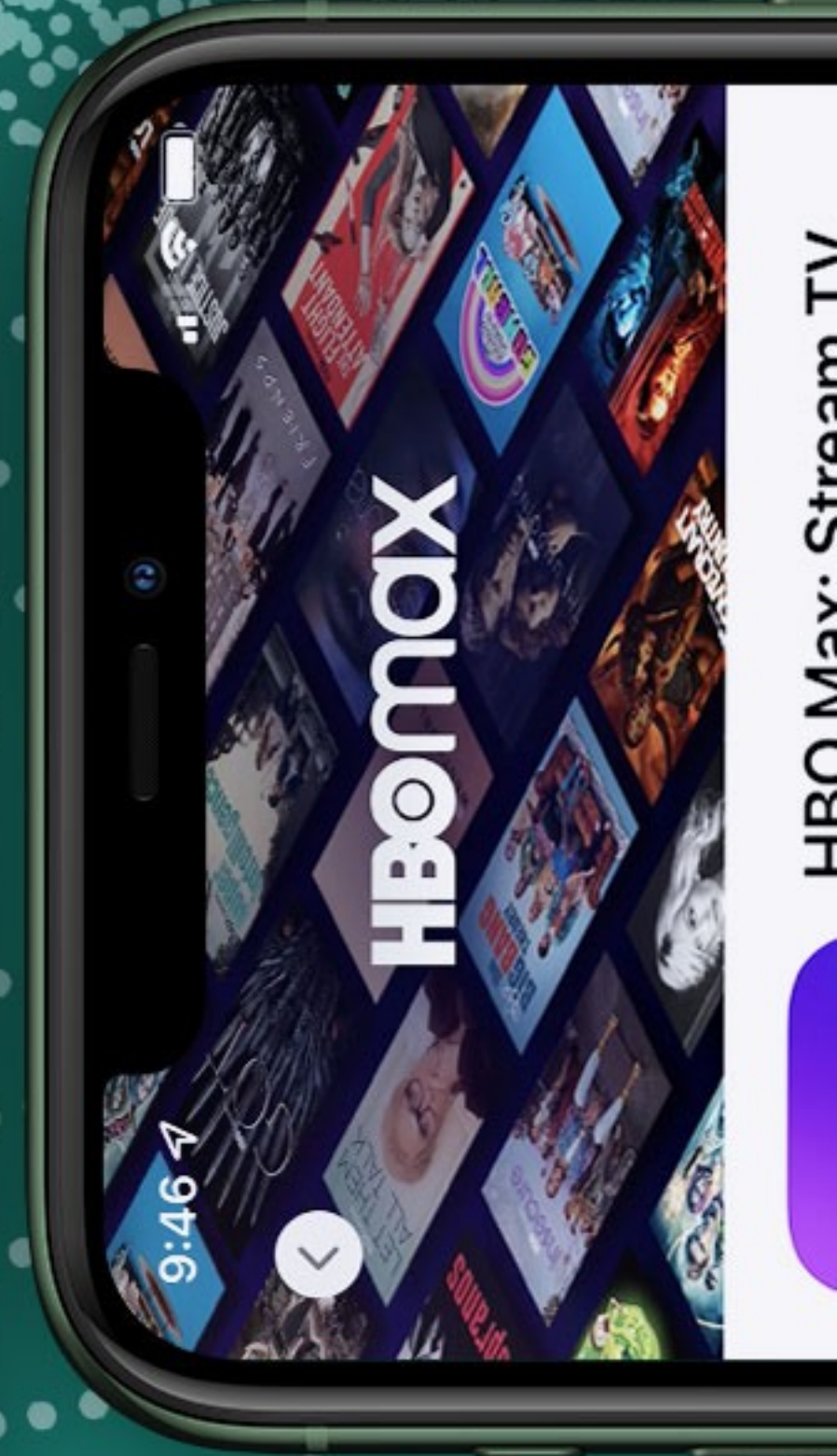
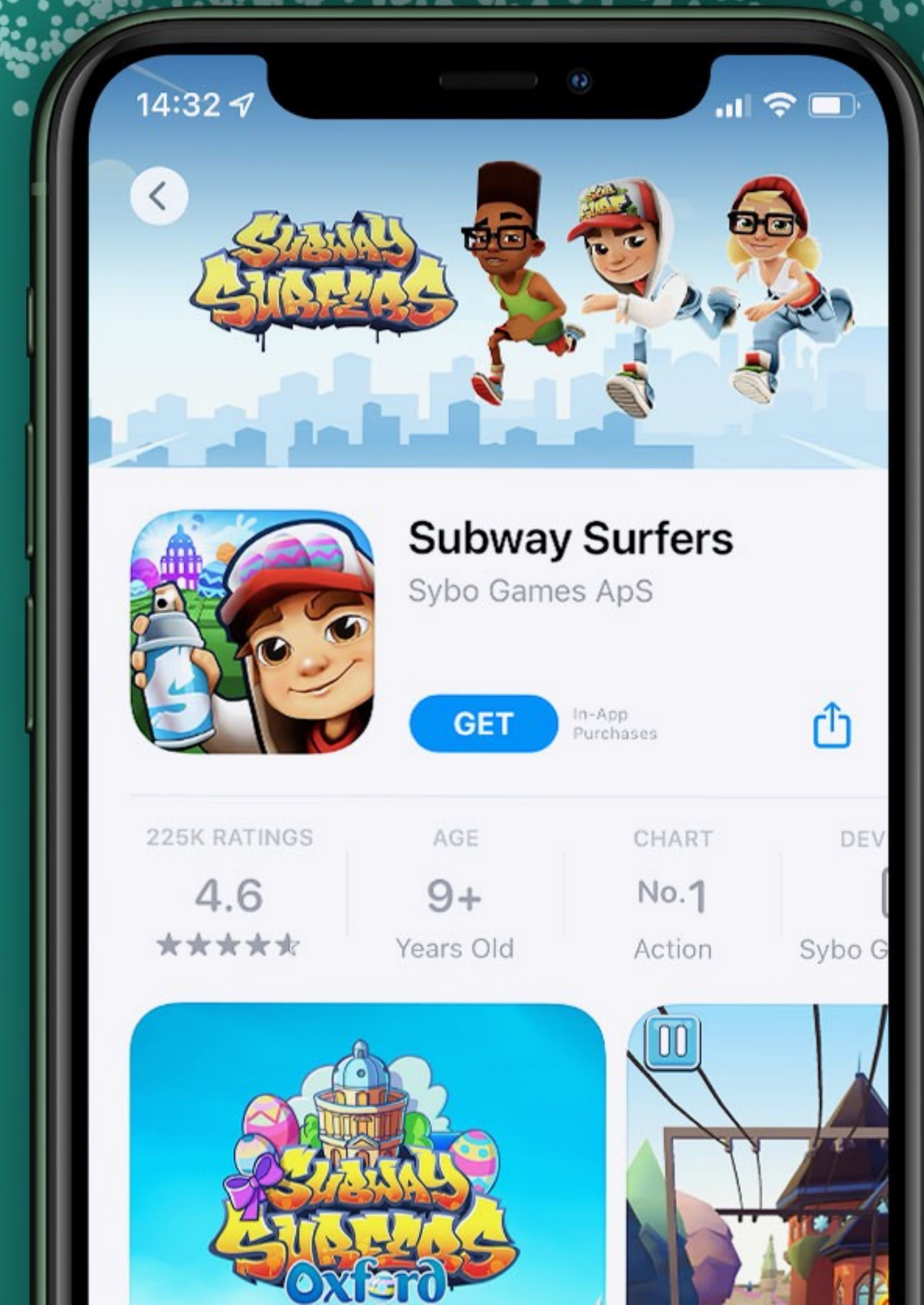
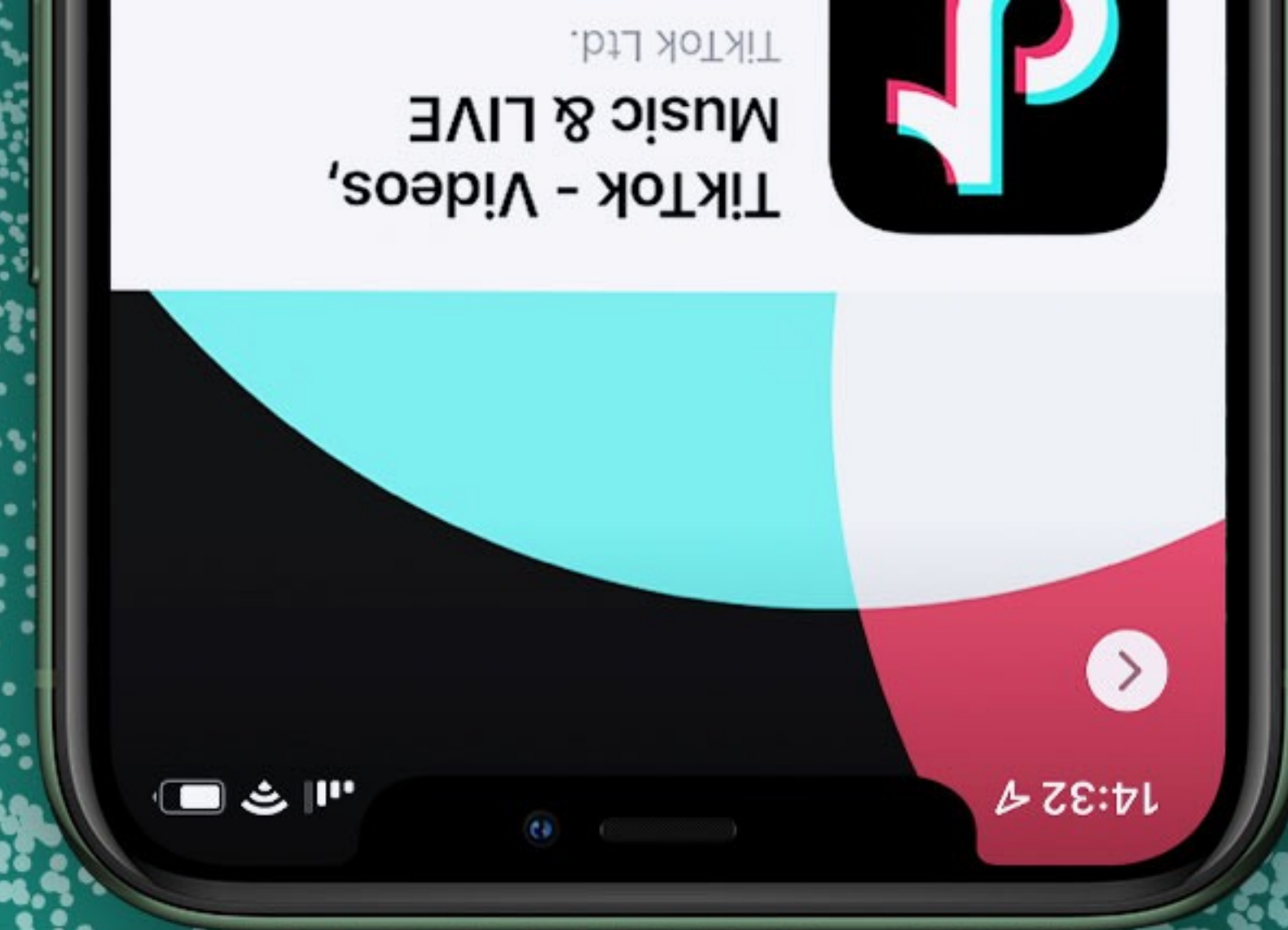




Q1 2022: Store Intelligence Data Digest

Explore the Quarter's Top Apps,
Games, Publishers, and More



Executive Summary: Highlights



Worldwide app downloads totaled 36.9 billion in 1Q22, a 1.4 percent year-over-year increase.

App Store downloads grew 2.4 percent to 8.6 billion, while Google Play downloads grew 1.1 percent to 28.3 billion.



Inflation and rising gas prices in Q1 2022 caused a surge in demand for gas price tracking and reward apps. Top apps in the U.S., Germany, France, and the U.K. saw adoption grow by more than a thousand percent in early March.



TikTok was the top app by worldwide downloads in Q1 2022, surpassing Instagram for the top spot.

TikTok surpassed 3.5 billion all-time downloads in Q1 2021, becoming just the fifth app to cross this threshold—and the only one not owned by Meta.



Wordle, a word game that happened to share the same name as the viral web-based hit, was the top mobile game in the U.S. The game added the “six guess” gameplay in February and was later acquired by AppLovin’s Lion Studios.

About This Data: Methodology

Sensor Tower's Mobile Insights team compiled the download estimates provided in this report using the Sensor Tower Store Intelligence platform.

- Figures cited in this report reflect App Store and Google Play download estimates for January 1, 2022 through March 31, 2022.
- Download estimates presented are on a per-user basis, meaning that only one download per Apple or Google account is counted towards the total.
- Downloads of the same app by the same user to multiple devices, updates, or re-installs of the same app by the same user are not counted towards the total.
- Android app install estimates represent downloads from the Google Play Store only. Sensor Tower does not provide download estimates for third-party Android stores.

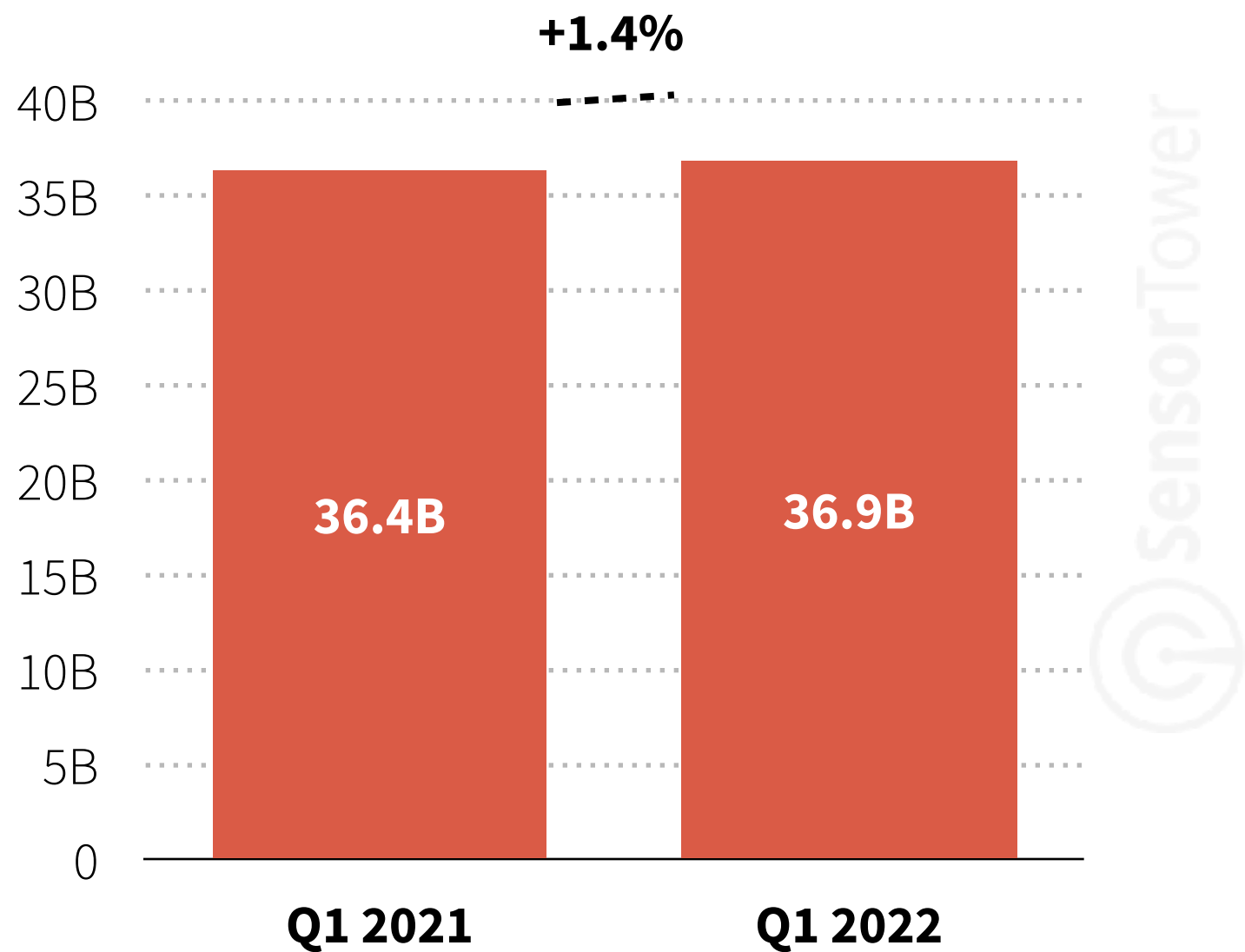
Could your business benefit from access to Store Intelligence insights and the highly accurate data used to build this report?

See the fastest growing apps and publishers by downloads or revenue.

REQUEST DEMO 

Market Overview: Q1 2022 Worldwide Download Growth

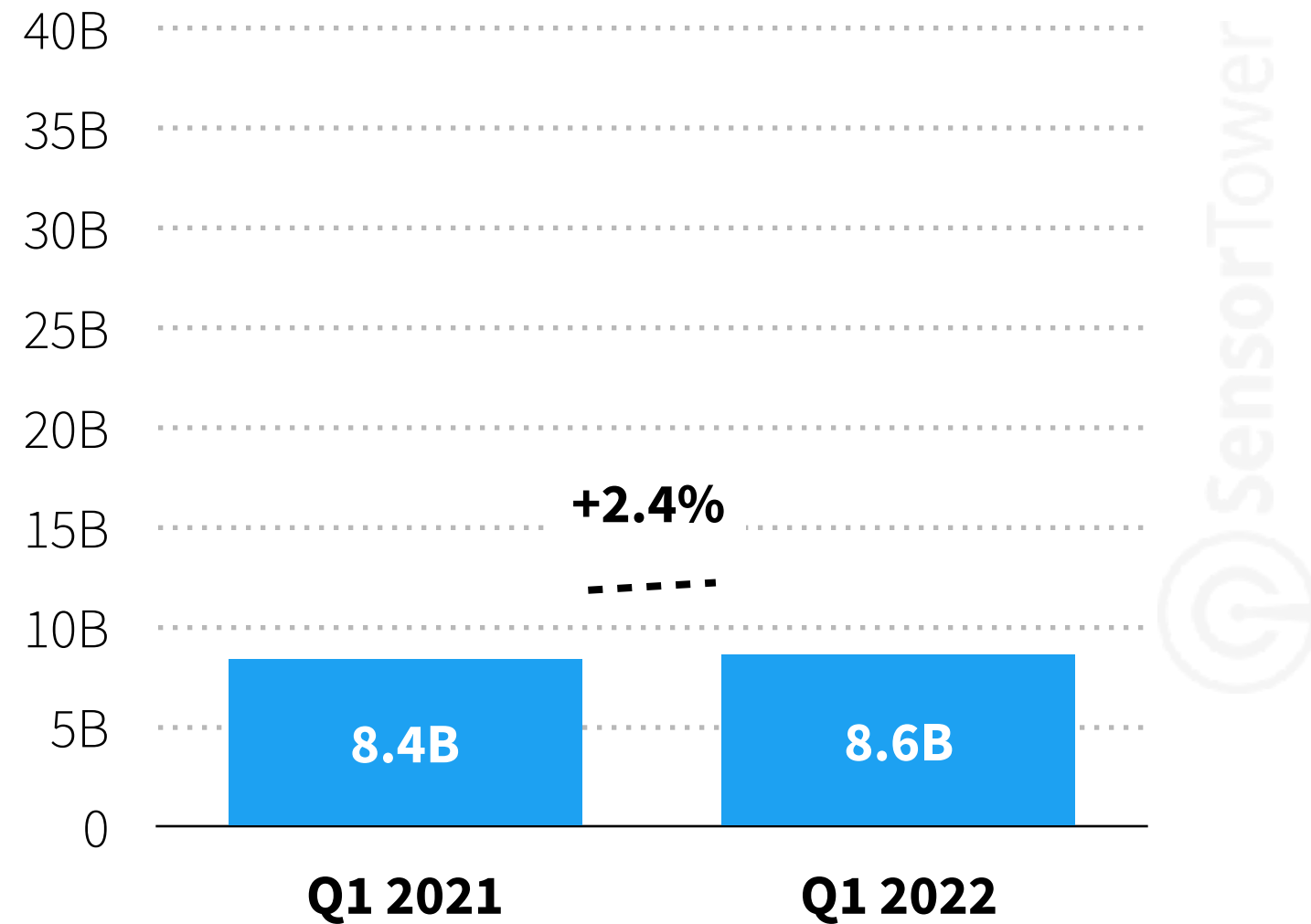
Worldwide App Store and Google Play Downloads



36.9 Billion

App Store + Google Play Downloads

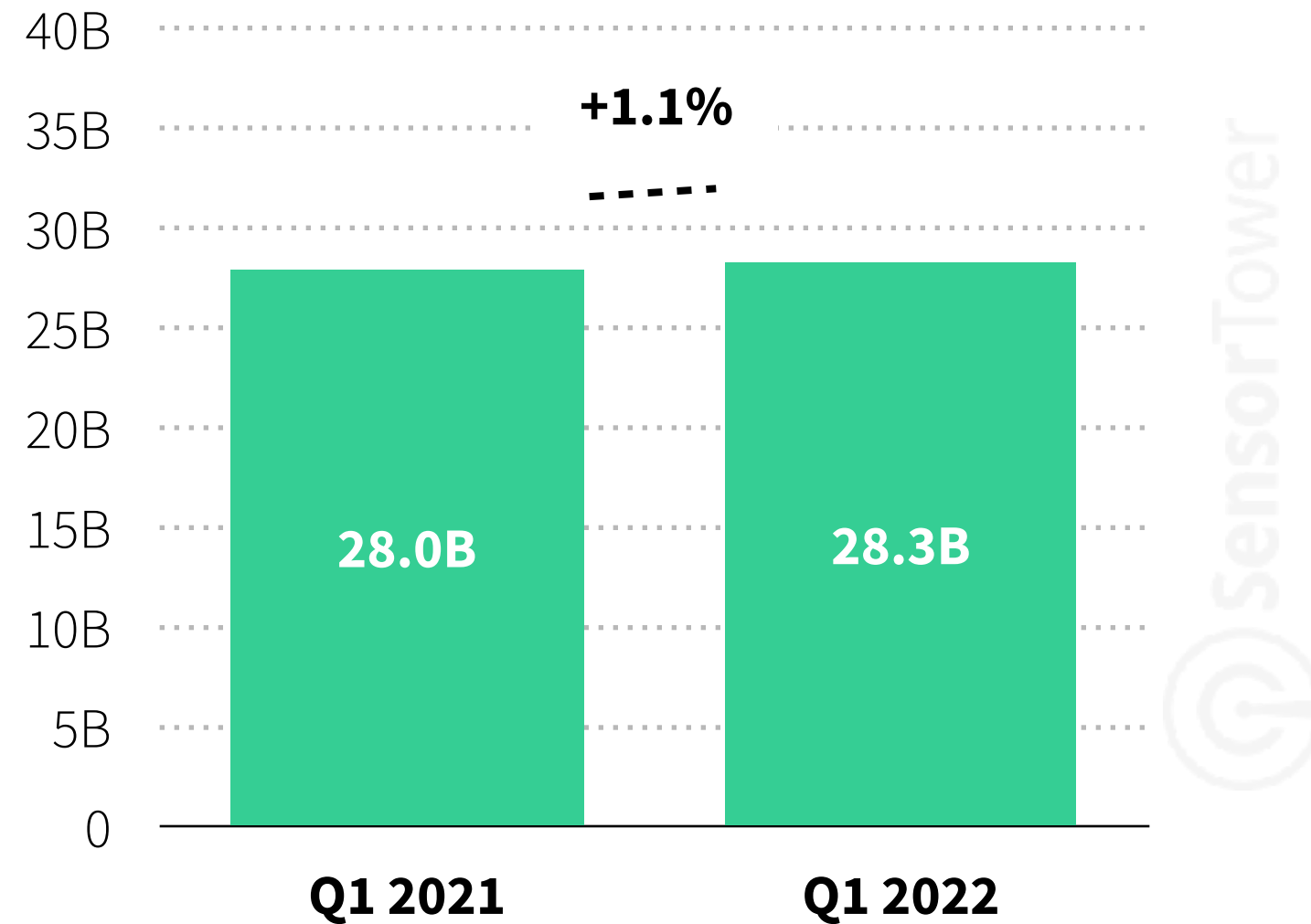
Worldwide App Store Downloads



8.6 Billion

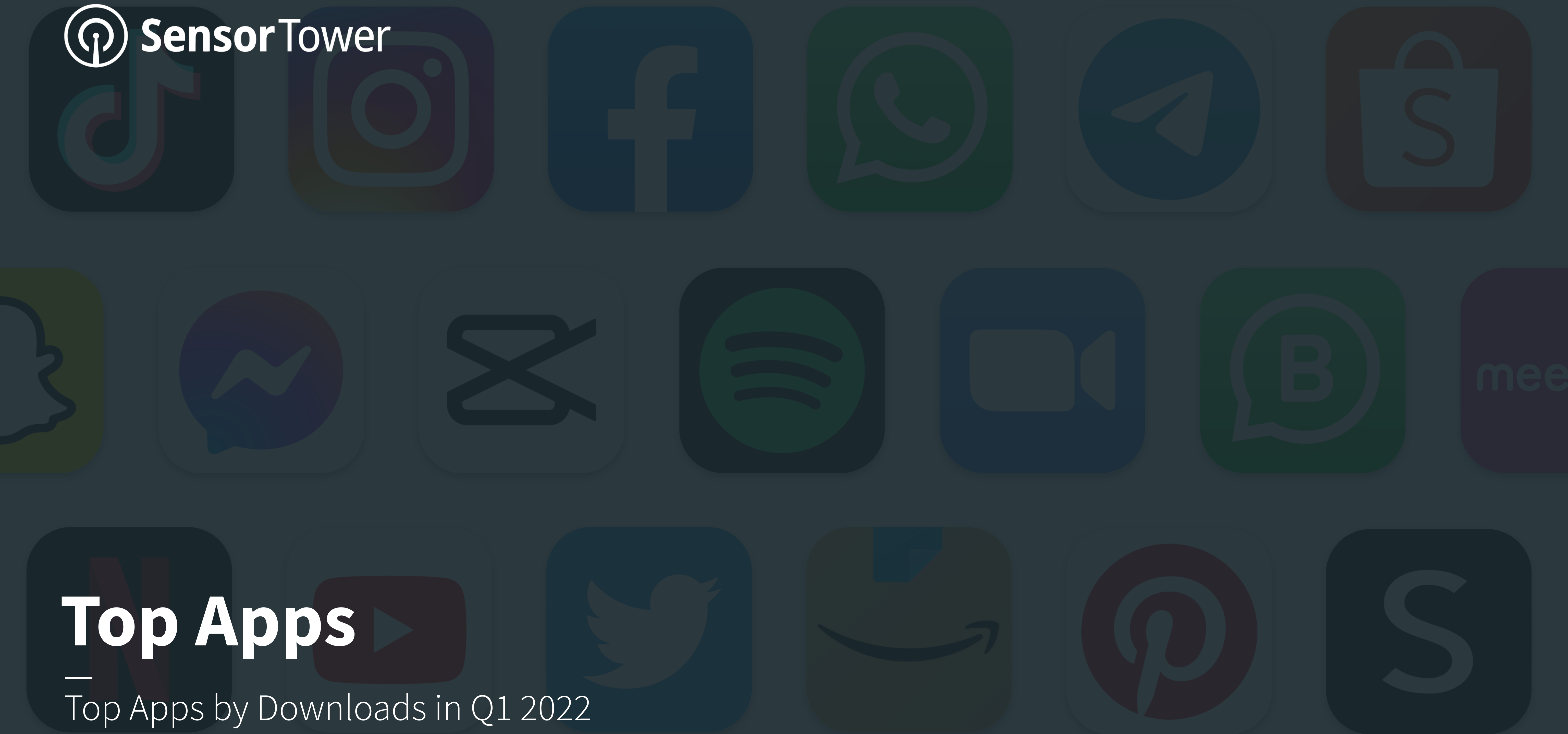
App Store Downloads

Worldwide Google Play Downloads



28.3 Billion

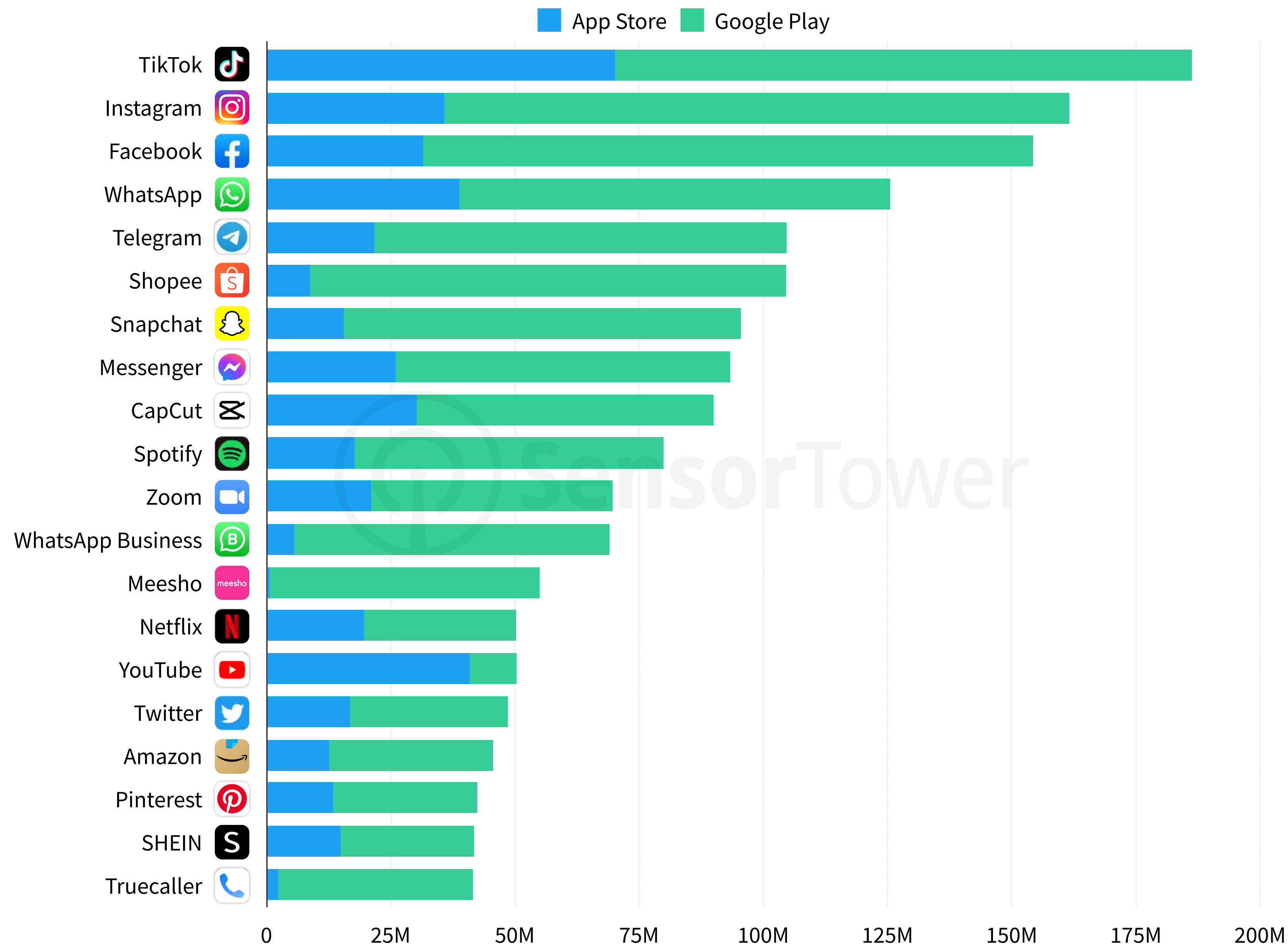
Google Play Downloads



Top Apps

Top Apps by Downloads in Q1 2022

Overall - Worldwide



Top Apps by Worldwide Downloads

TikTok surpassed 3.5 billion all-time downloads in Q1 2021, becoming just the fifth app (and the only one not owned by Meta) to cross this threshold. No app has had more downloads than TikTok since the start of 2018.

Meta had three of the top five apps, with Instagram as its top app for the third straight quarter. While Instagram’s installs were down 7 percent quarter-over-quarter, it was still the app’s second best total since at least 2014.

Note Regarding Download Estimates

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App Store - Worldwide

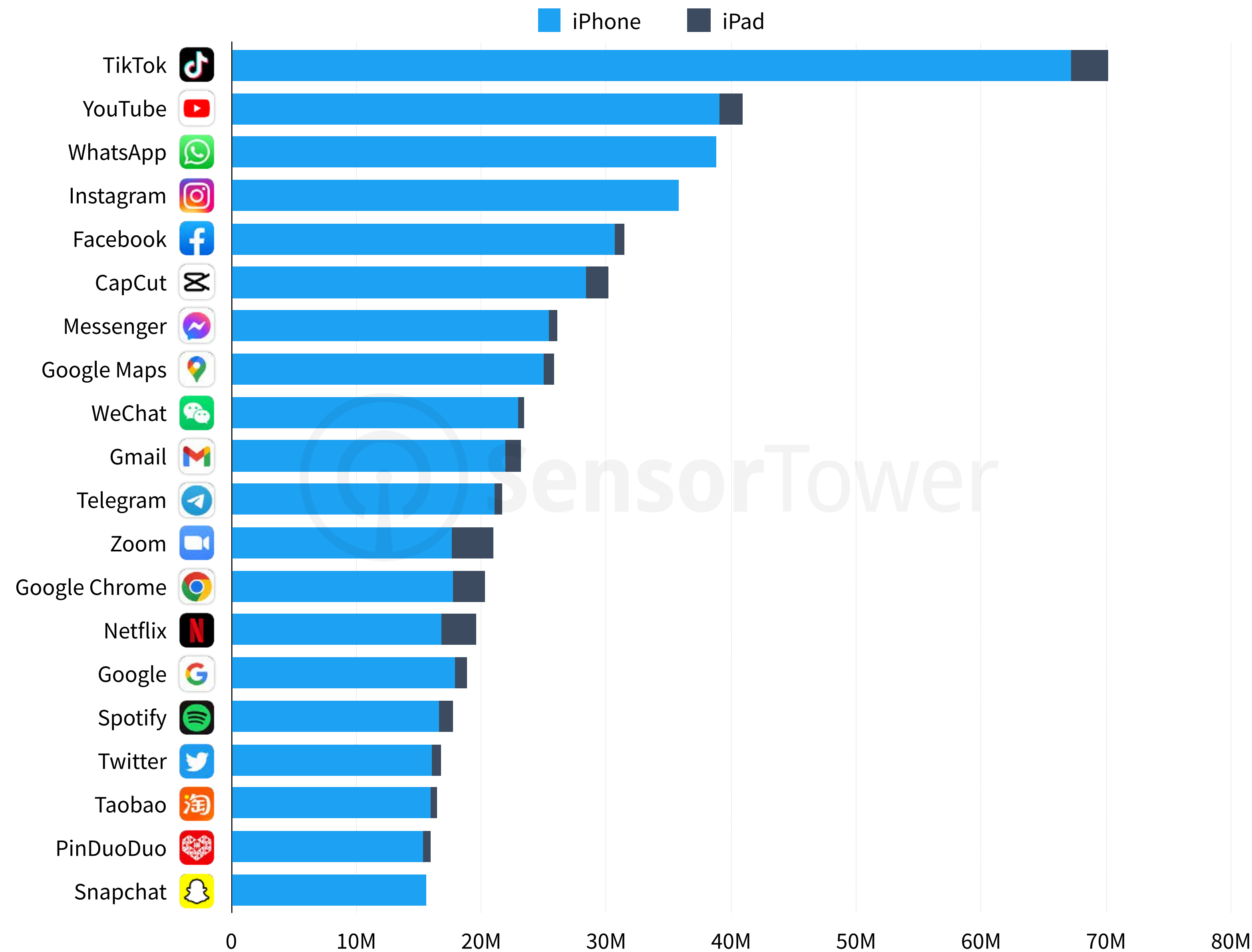
Top Apps by Worldwide Downloads

The order of the top five apps has remained unchanged the past three quarters. TikTok surpassed 70 million App Store downloads for only the third time in Q1 2022, driven by 11 percent quarter-over-quarter growth in Asia.

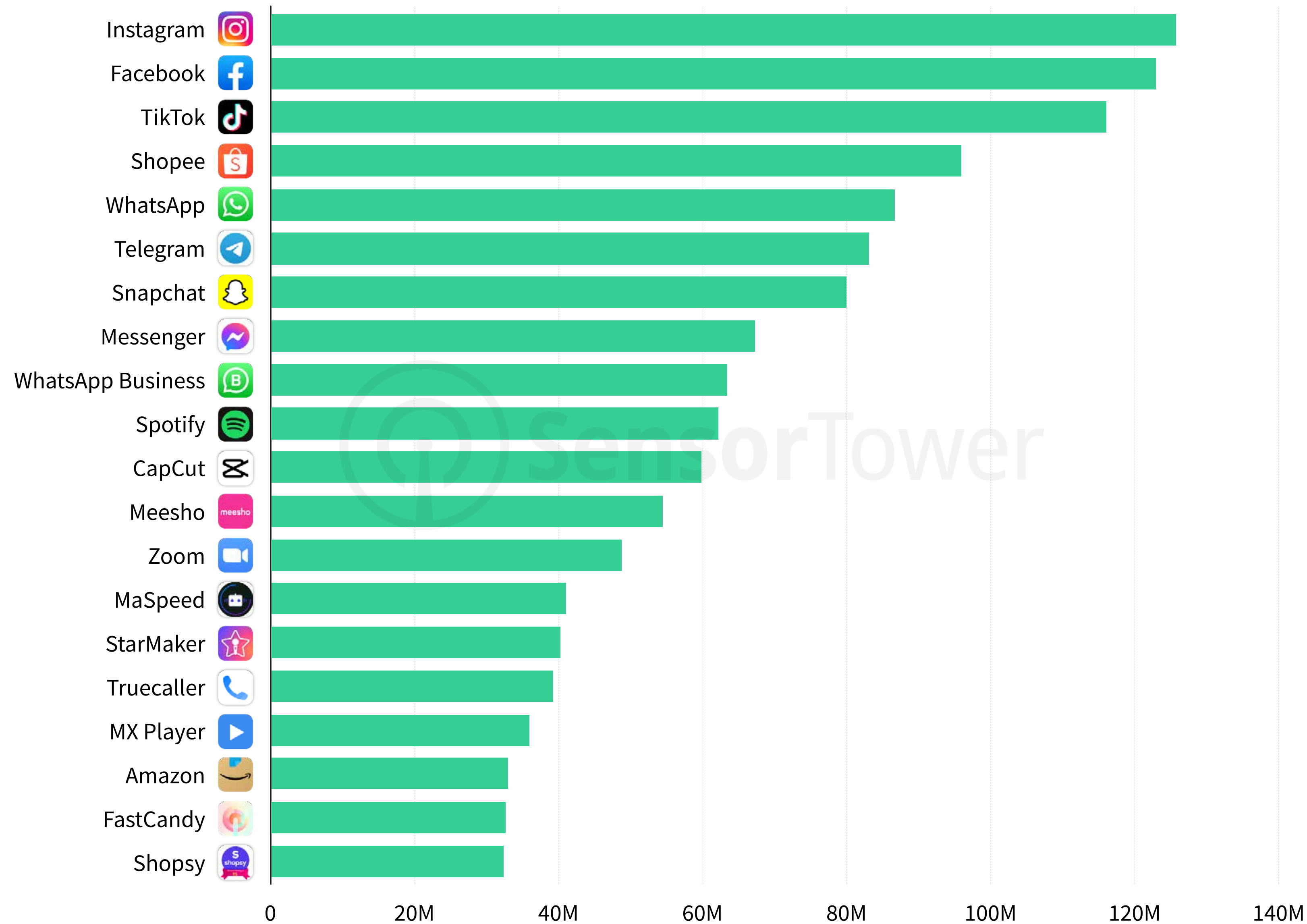
CapCut, a video editing app from TikTok's publisher ByteDance, had its best quarter to date with more than 30 million downloads. It has ranked among the top 10 App Store apps each of the past five quarters.

Note Regarding Download Estimates

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Google Play - Worldwide



Top Apps by Worldwide Downloads

Meta had another great quarter on Google Play. Instagram and Facebook led its five apps among the top 10 by adoption in Q1 2022.

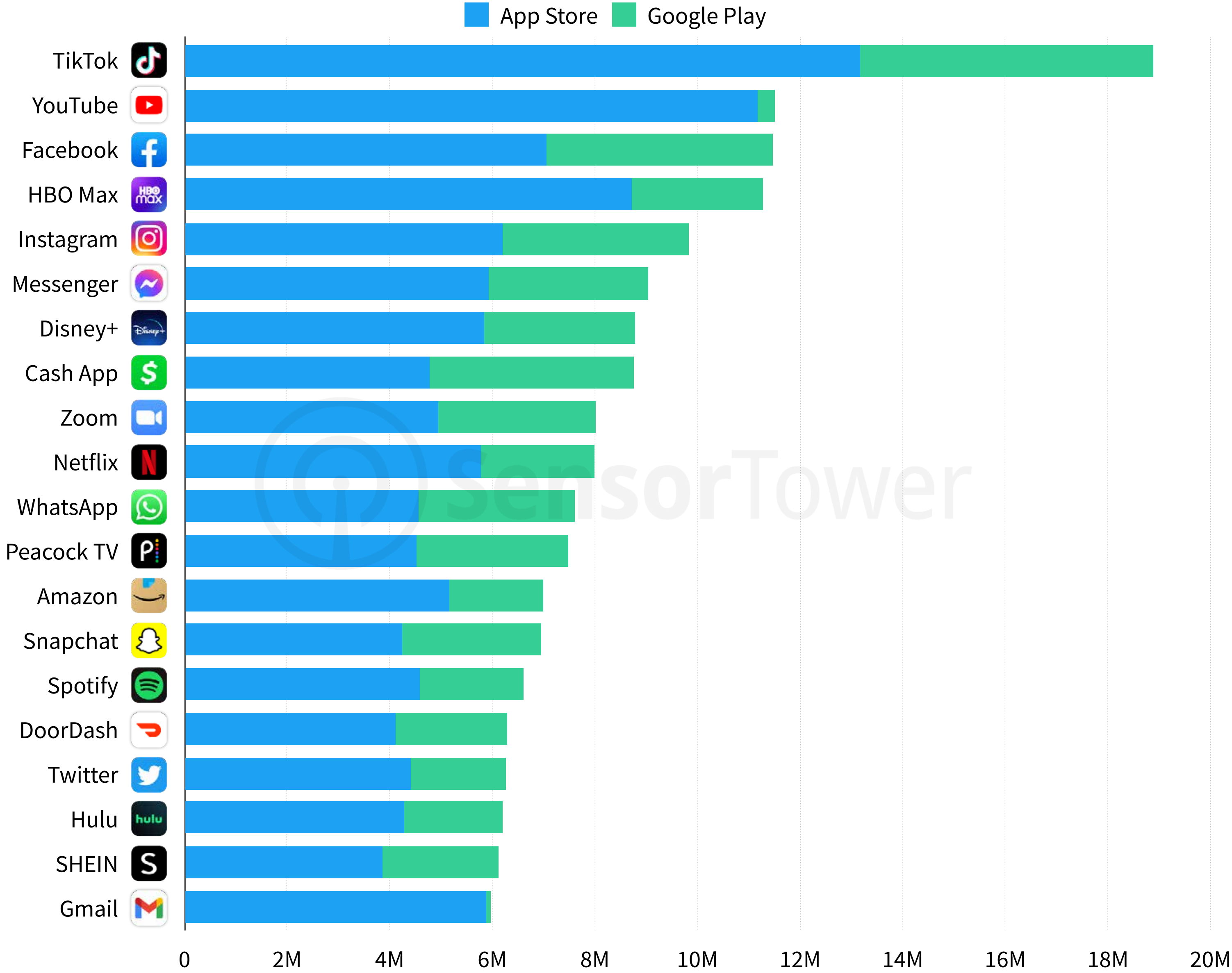
Shopee’s rapid ascent continued in the first quarter of 2022, with its Google Play downloads reaching a new high 96 million.

Shopsy joined Shopee and Meesho as top ranked Shopping apps for the first time last quarter. Overall Shopping installs on Google Play climbed 18 percent year-over-year in Q1 2022.

Note Regarding Download Estimates

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Overall - United States



Top Apps by U.S. Downloads

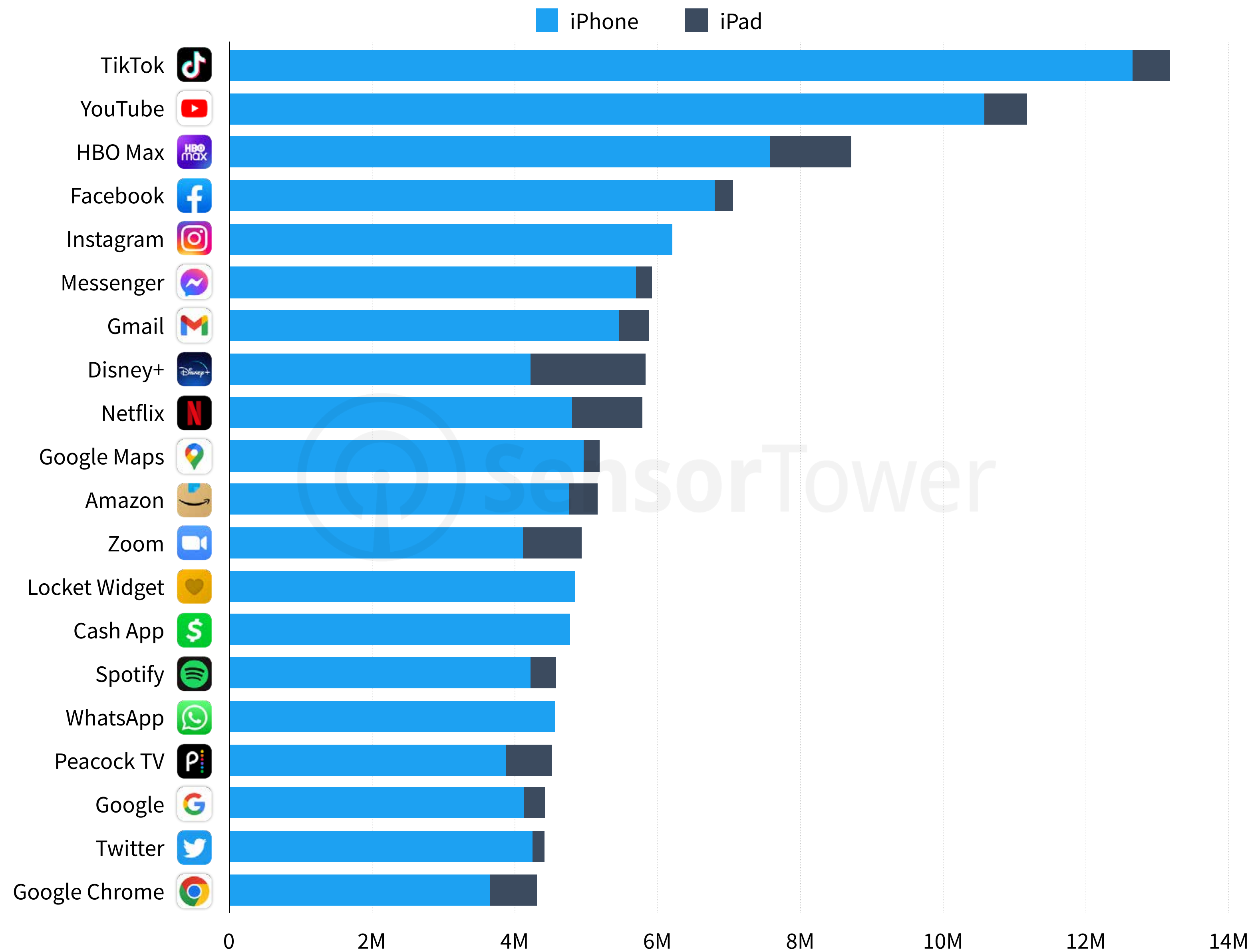
TikTok has been the top app by U.S. downloads each quarter since Q1 2021. The last app to best TikTok was Zoom in Q4 2020.

HBO Max reached the top five with its best quarter to date in the U.S. January 2022 was the app's second best month for U.S. adoption driven by the release of season two of Euphoria, trailing only April 2021 when it released the feature film Godzilla vs. Kong.

Note Regarding Download Estimates

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App Store - United States



Top Apps by U.S. Downloads

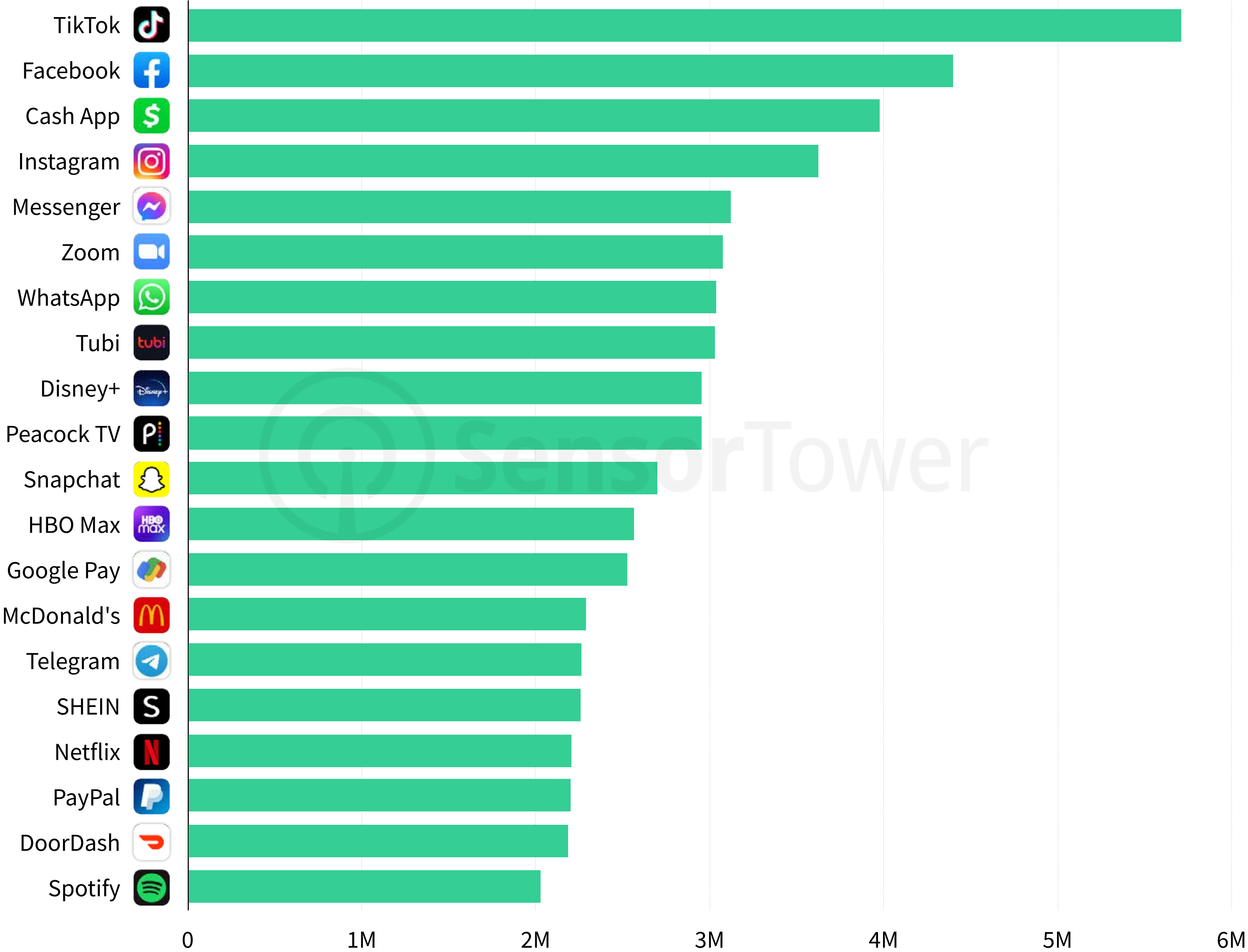
TikTok and YouTube have been the top two apps on the U.S. App Store each quarter since Q1 2021. TikTok has surpassed 10 million downloads each of the past nine quarters, while YouTube has surpassed this threshold for eight straight quarters.

The streaming video space remained competitive in the U.S. HBO Max had the best quarter on the U.S. App Store for any subscription video on demand (SVOD) app since Disney+'s launch in late 2019, passing Netflix for only the second time.

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Google Play - United States



Top Apps by U.S. Downloads

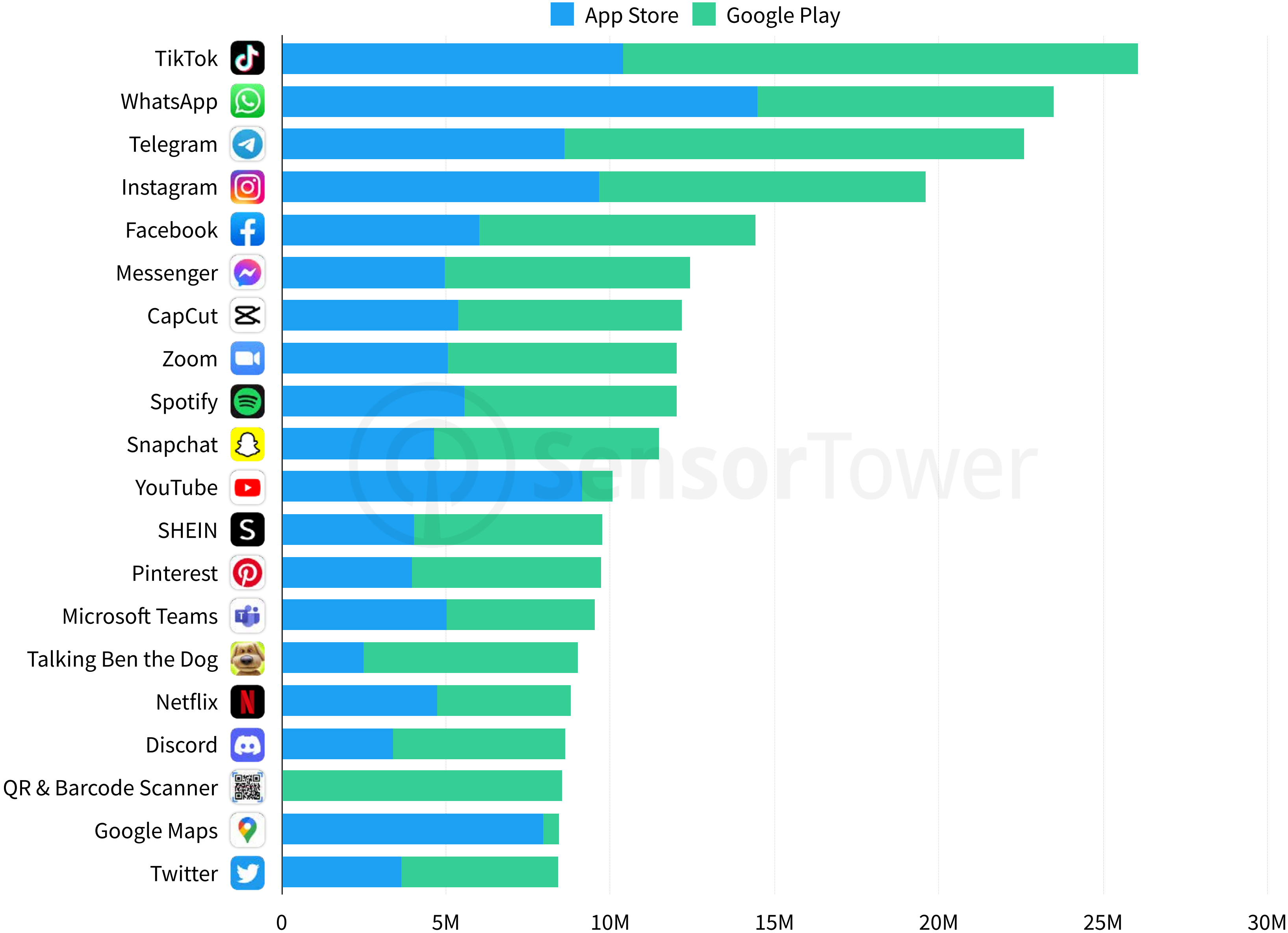
TikTok was the top app on Google Play for the third straight quarter, with installs up 19 percent year-over-year in Q1 2022. It was joined in the top five by three Meta-owned apps and Cash App.

Zoom had positive quarter-over-quarter growth for the first time in a year, reaching No. 6 on Google Play with more than 3 million downloads. Zoom was the top app on Google Play as recently as Q1 2021.

Note Regarding Download Estimates

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Overall - Europe



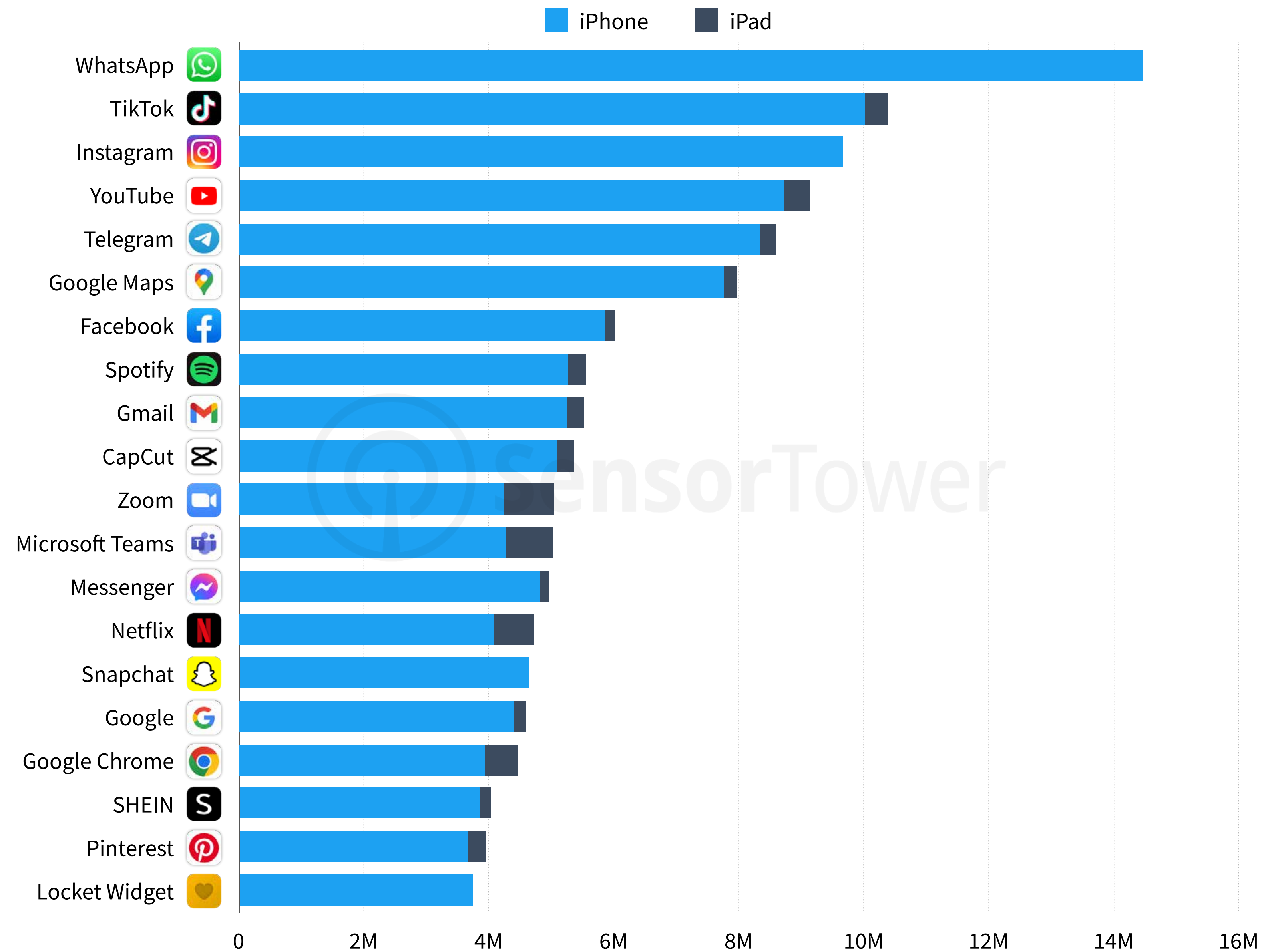
Top Apps by European Downloads

The same five apps have taken the top spots in Europe each of the past four quarters. TikTok and WhatsApp had the top two positions, while Instagram fell one spot from last quarter to No. 4

Telegram had its second best quarter in Europe in Q1 2022, only trailing the nearly 28 million installs it had in Q1 2021. Russia was Telegram's top country in Europe in 1Q22, followed by Ukraine and Turkey.

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App Store - Europe



Top Apps by European Downloads

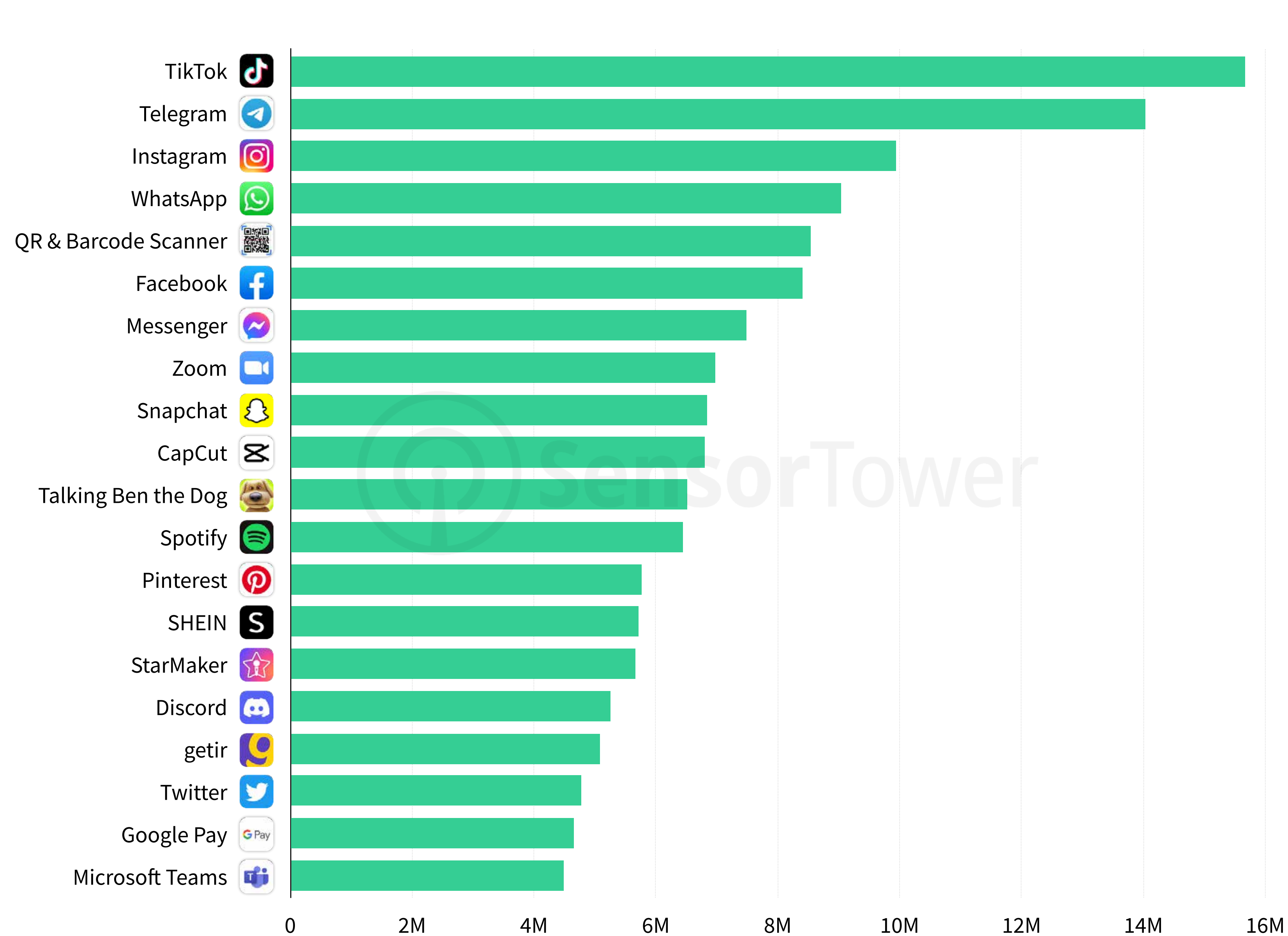
WhatsApp was the top App Store app in Europe for the seventh straight quarter in Q1 2022. It was also WhatsApp's best first quarter of the year since 2018.

CapCut joined TikTok as a top 10 app last quarter from the Chinese publisher ByteDance. CapCut accounted for a new high at nearly 34 percent of ByteDance's App Store downloads in Europe last quarter.

Note Regarding Download Estimates

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Google Play - Europe



Top Apps by European Downloads

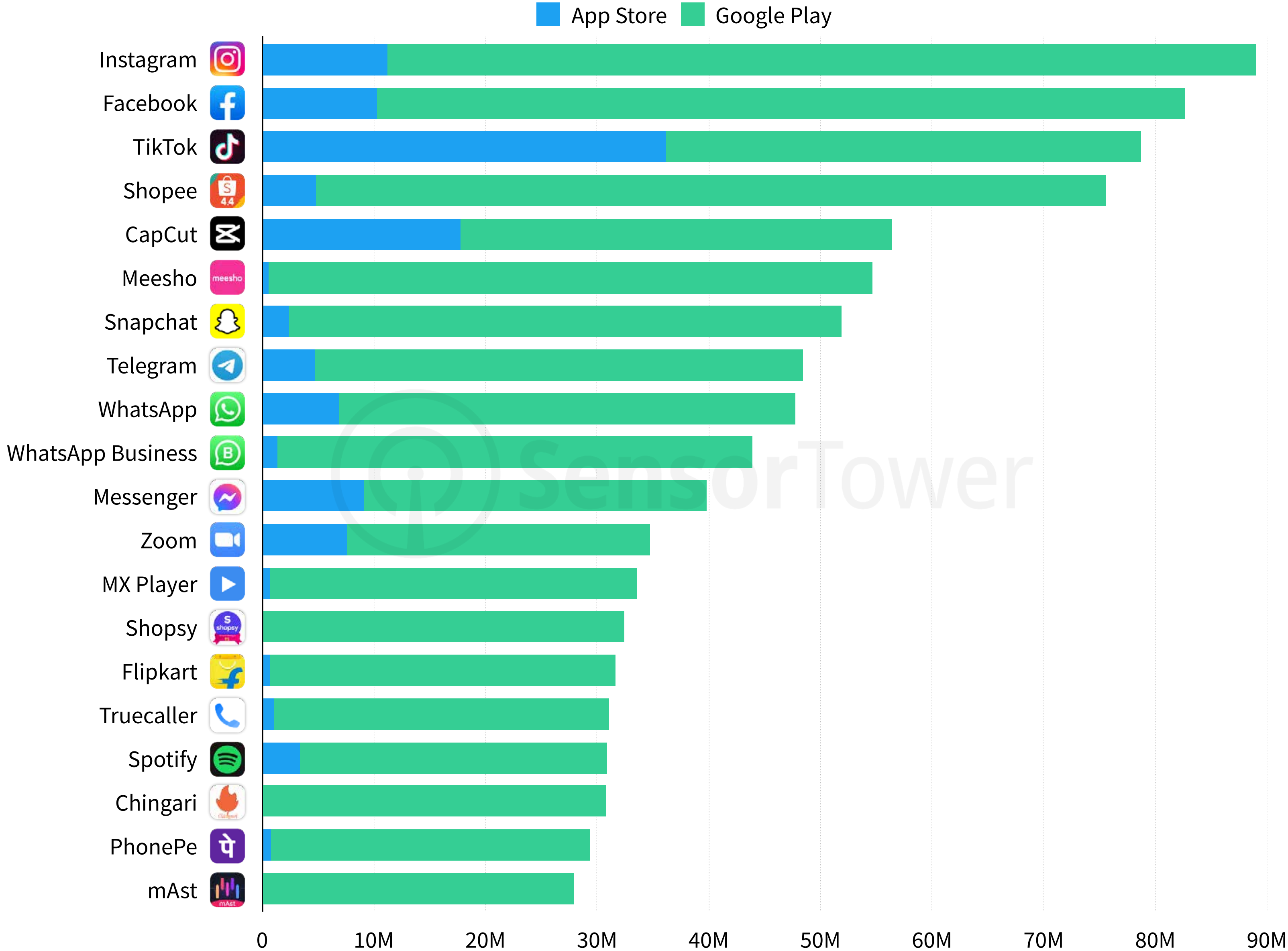
While WhatsApp has been the top App Store app in Europe for each of the past seven quarters, TikTok has held the top spot on Google Play over the same period. However, Telegram was not far behind last quarter with more than 14 million downloads.

There was not a lot of turnover among top apps last quarter. CapCut was the only app to enter the top 10, and Talking Ben the Dog, SHEIN, StarMaker, and Twitter were the only apps to reach the top 20 that were outside the top 20 last quarter.

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Overall - Asia



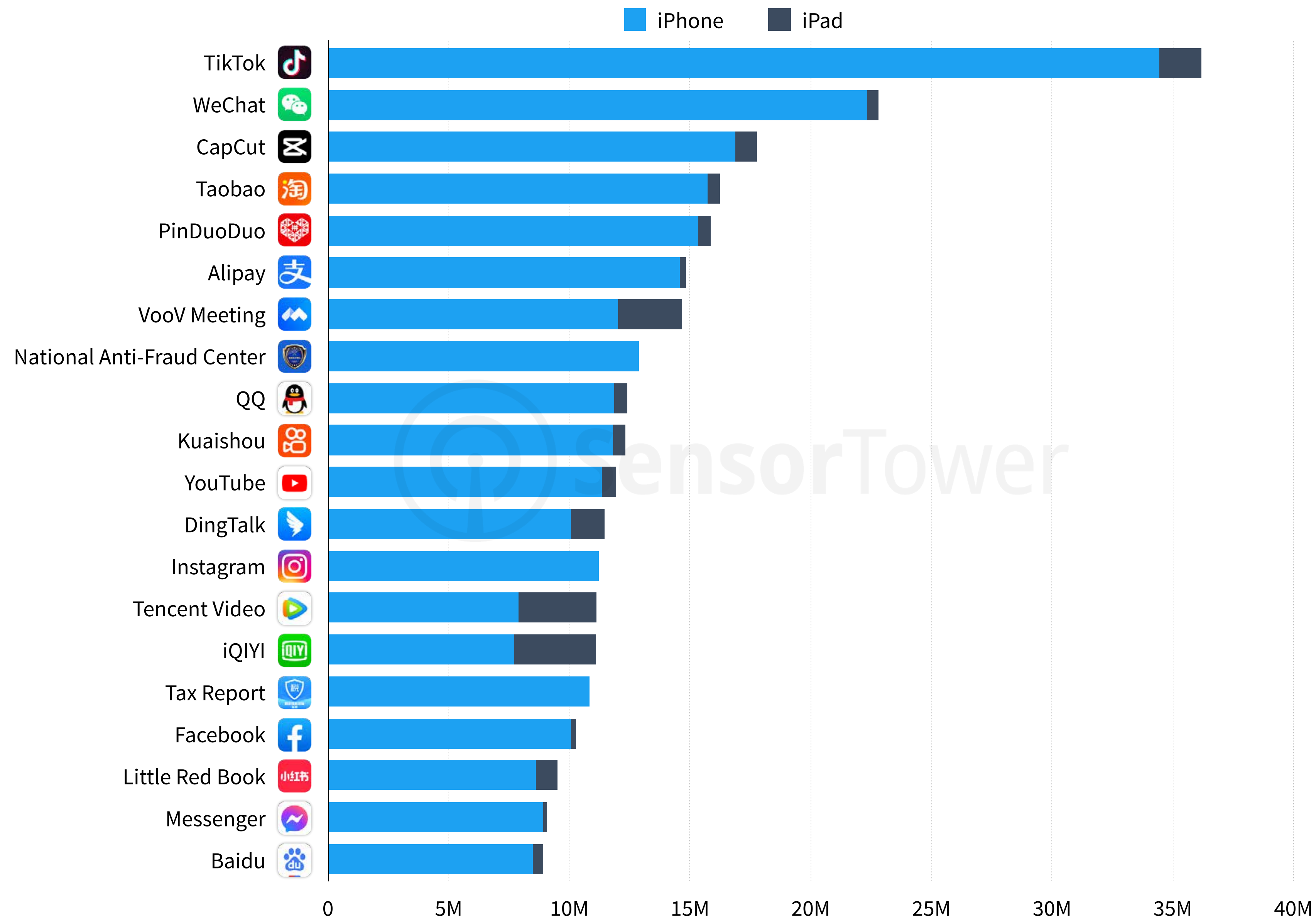
Top Apps by Asia Downloads

Instagram was the top app for third straight quarter in Q1 2022, followed by another Meta-owned app, Facebook. Instagram was the top app in India, and the country accounted for more than 60 percent of Instagram’s installs in the region.

TikTok, the top in the U.S. and Europe, ranked No. 3 in Asia. It managed this despite being banned in India, the largest market for app installs in the world.

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App Store - Asia



Top Apps by Asia Downloads

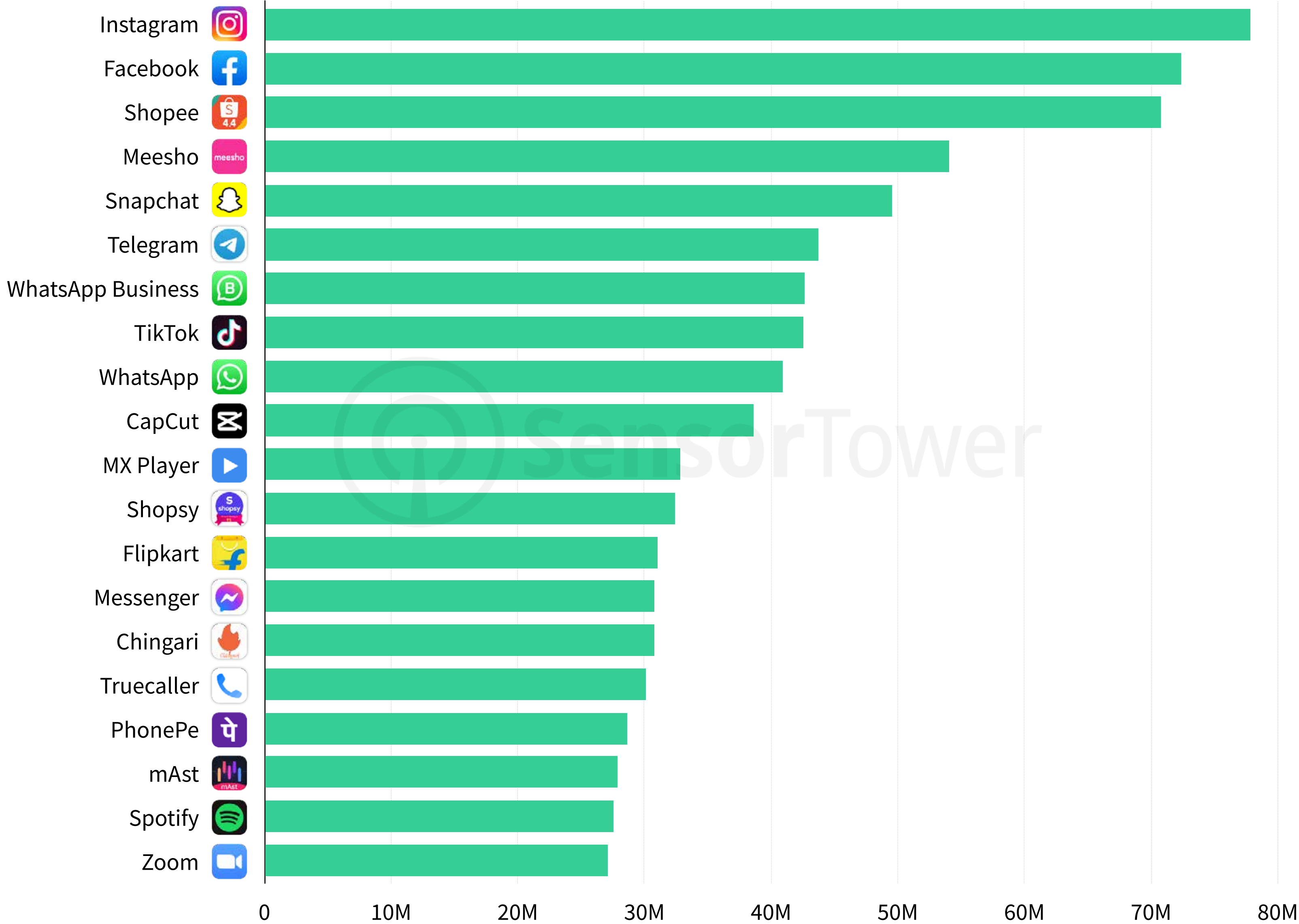
ByteDance had two of the top three apps in Asia on the App Store in Q1 2022. CapCut moved up four positions from last quarter to rank at No. 3, helping ByteDance to its best quarter in two years.

As China imposed lockdowns against a surge in COVID-19, VooV Meeting's downloads climbed 126 percent quarter-over-quarter to more than 14.6 million. It had more than 10 million installs in March 2022 alone, even higher than the 9.8 million it saw in March 2020 at the start of the COVID-19 pandemic.

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Google Play - Asia

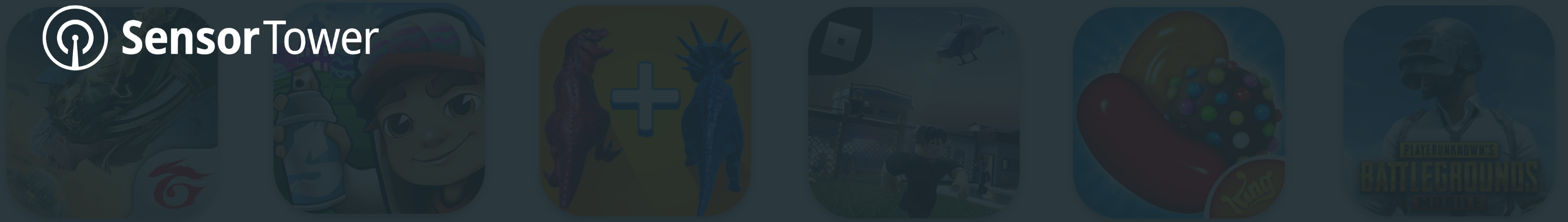


Top Apps by Asia Downloads

Instagram was the top Google Play app in Asia just ahead of Facebook and Shopee. Instagram has become a growing part of Meta’s app portfolio, accounting for 29 percent of Meta’s Google Play installs in Asia in Q1 2022, up from 26 percent in 1Q21 and 18 percent in 1Q20.

The Shopping category continued its rapid ascent on Google Play in Asia with installs up 63 percent year-over-year. Top apps including Shopee, Meesho, Shopsy, and Flipkart contributed to this high growth.

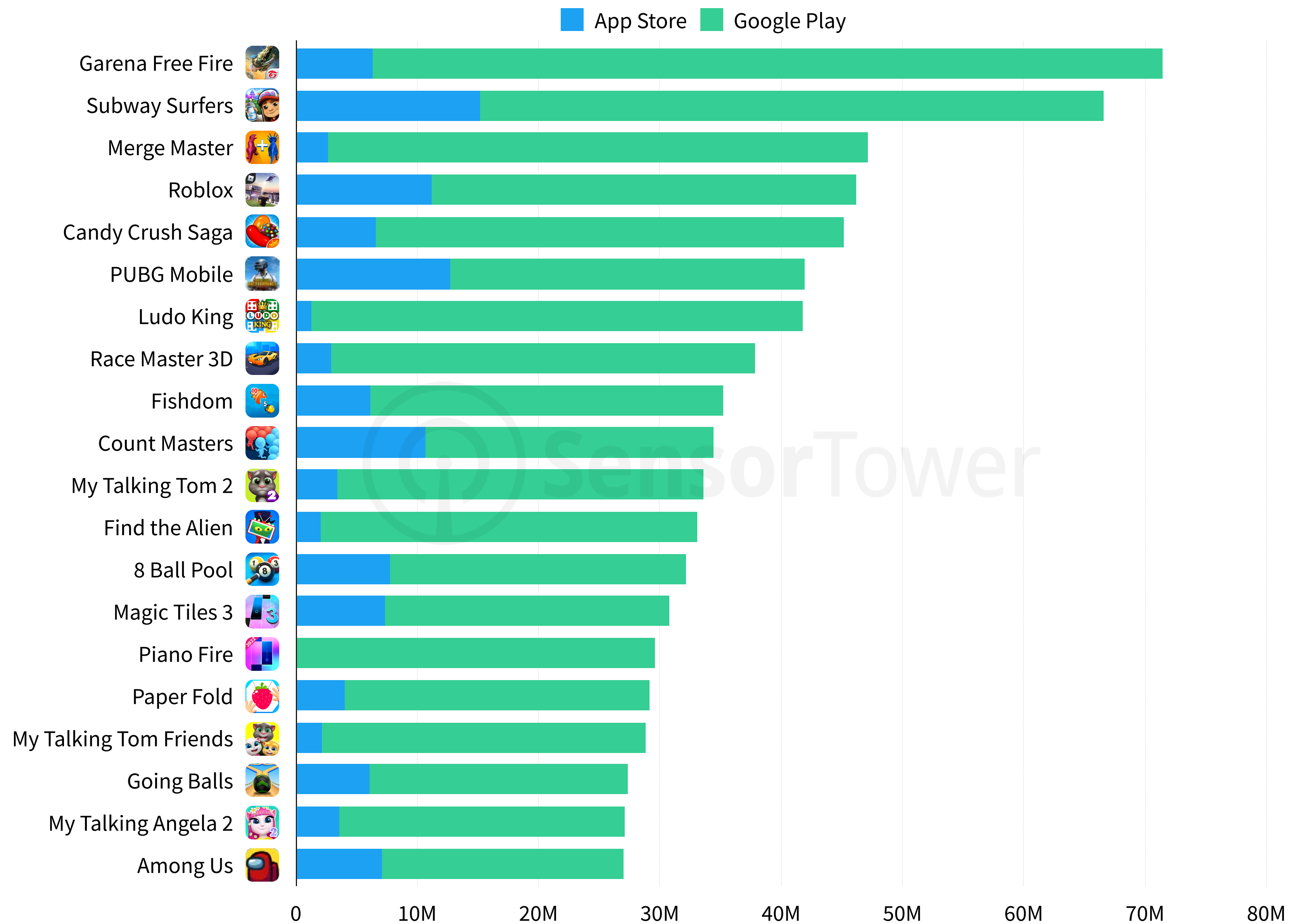
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Top Games

Top Games by Downloads in Q1 2022

Overall - Worldwide



Top Games by Worldwide Downloads

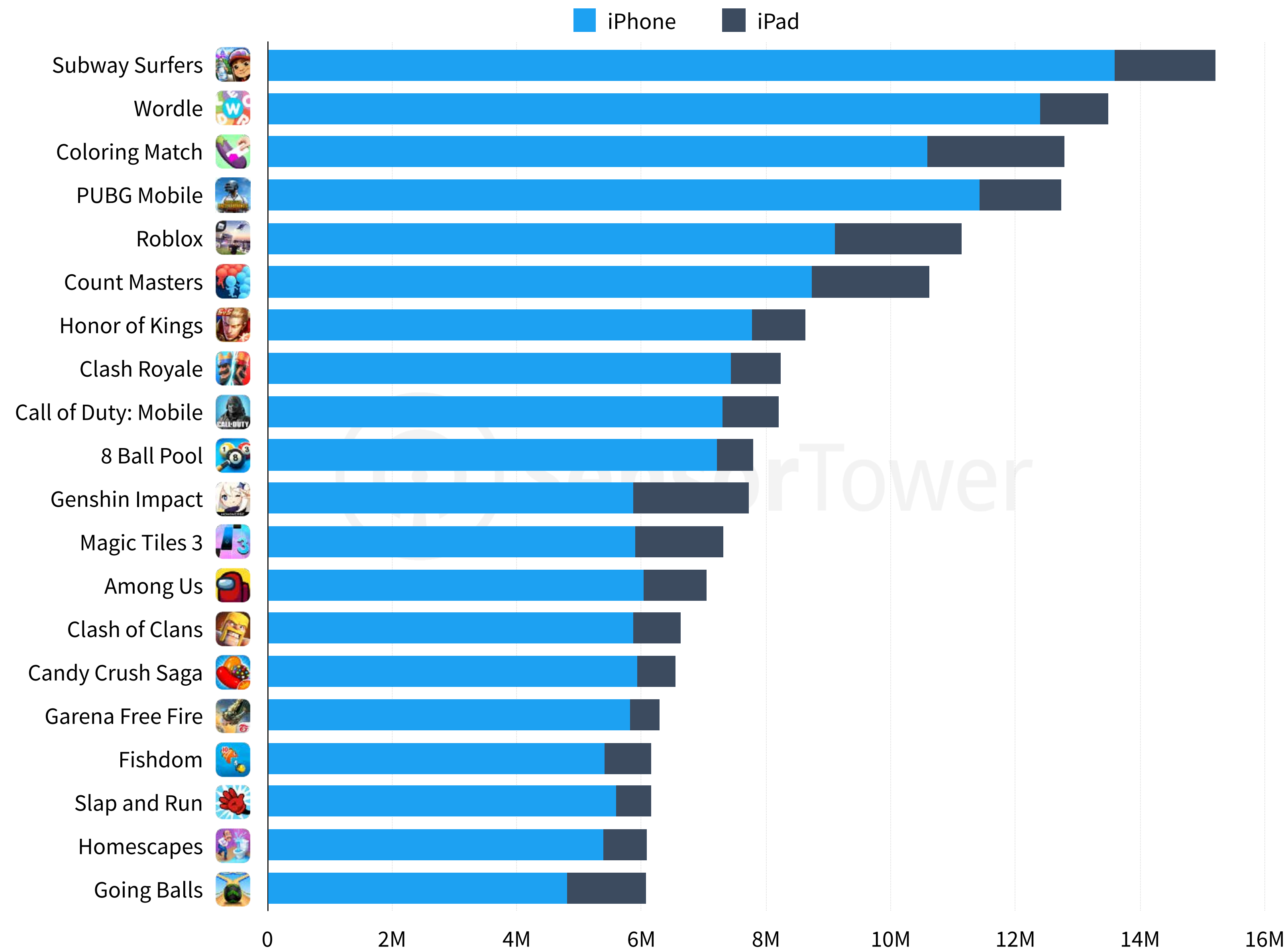
Garena Free Fire was the top game in back-to-back quarters, continuing a run of top Battle Royale games. PUBG Mobile, No. 6 last quarter, was the top game by worldwide downloads in Q3 2021.

Four of the top five apps from Q4 2021 returned in Q1 2022, including Garena Free Fire, Subway Surfers, Roblox and Candy Crush Saga. Merge Master, a hypercasual game from Homa Games, was the only new entrant to the top five.

Note Regarding Download Estimates

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App Store - Worldwide



Top Games by Worldwide Downloads

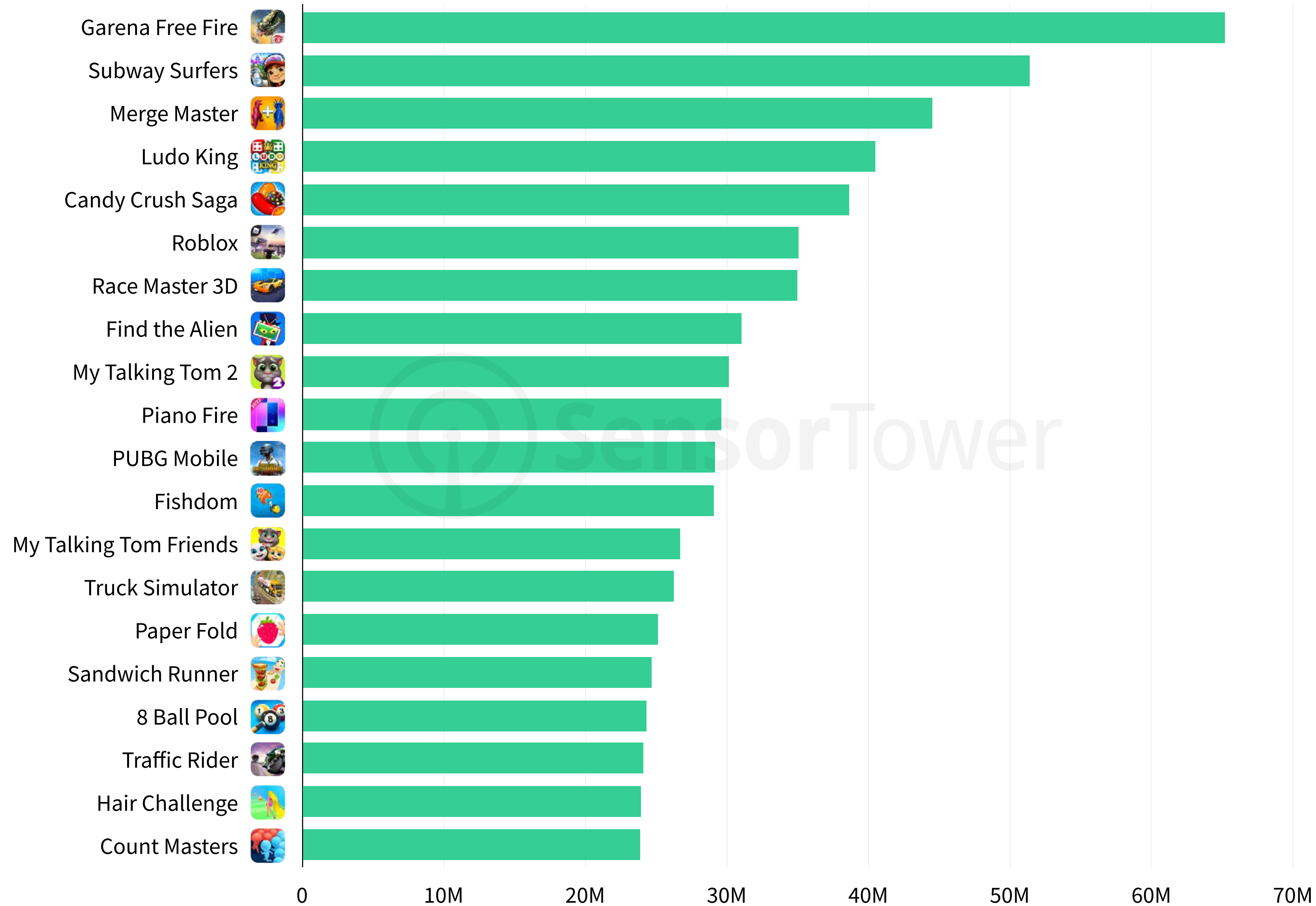
Subway Surfers was the top mobile game on the App Store in Q2 2022. Last quarter marked only the third time the game had more than 15 million downloads in a quarter, and installs were up 45 percent year-over-year.

Wordle, a word game released back in 2016, was able to take advantage of the frenzy for another web-based game that happened to share the same name. It had nearly 13.5 million App Store installs last quarter (compared to only 32 thousand downloads prior to 2022).

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Google Play - Worldwide



Top Games by Worldwide Downloads

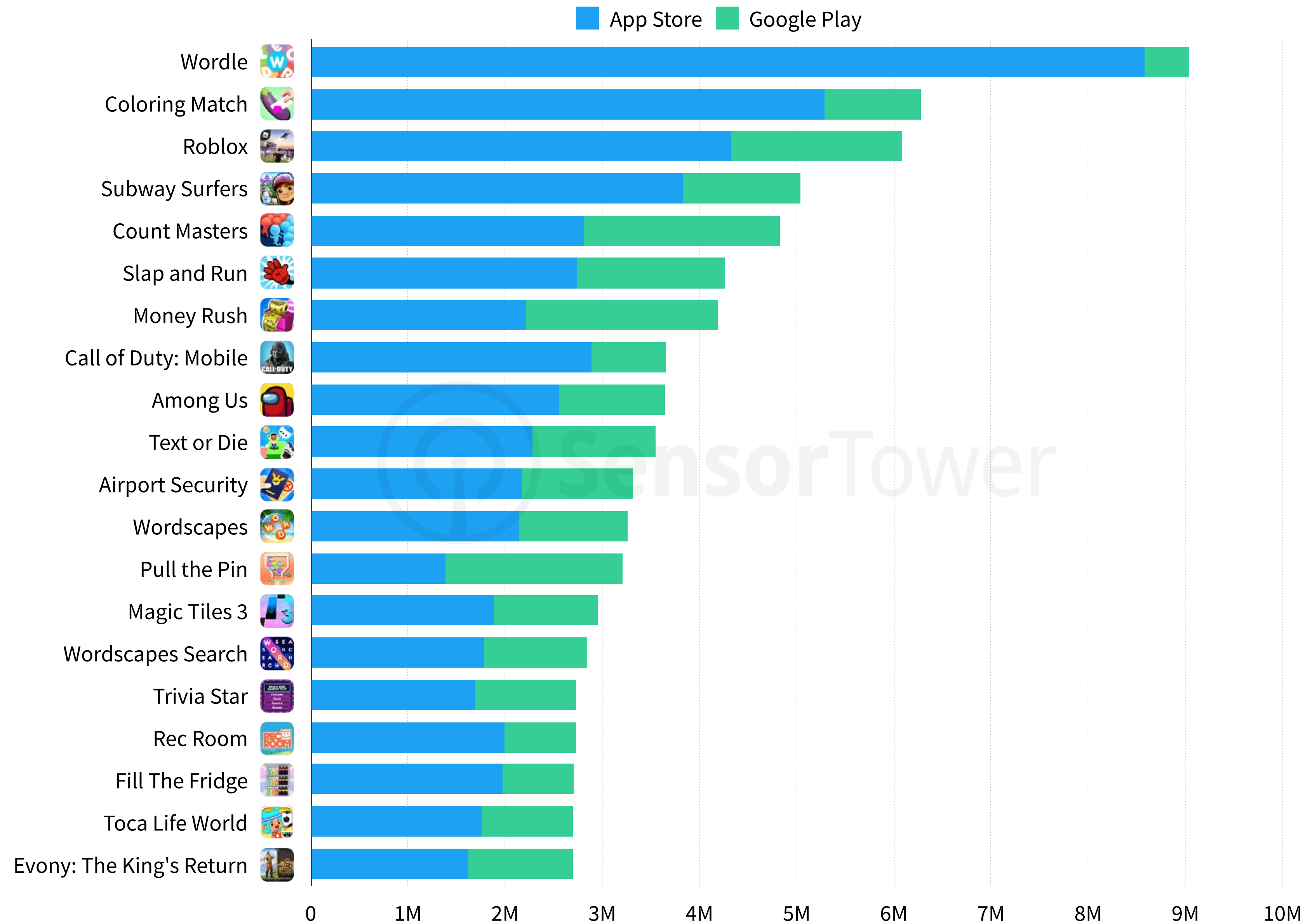
Garena Free Fire took the top spot on Google Play for the second straight quarter. Garena Free Fire MAX, a version of the game with better graphics, accounted for a new high 49 percent of the game’s total downloads on Google Play in Q2 2022.

Outfit7 was the only publisher with two of the top 20 games (My Talking Tom 2 and My Talking Tom Friends). My Talking Angela 2 also ranked just outside the top 20 at No. 22.

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Overall - United States



Top Games by U.S. Downloads

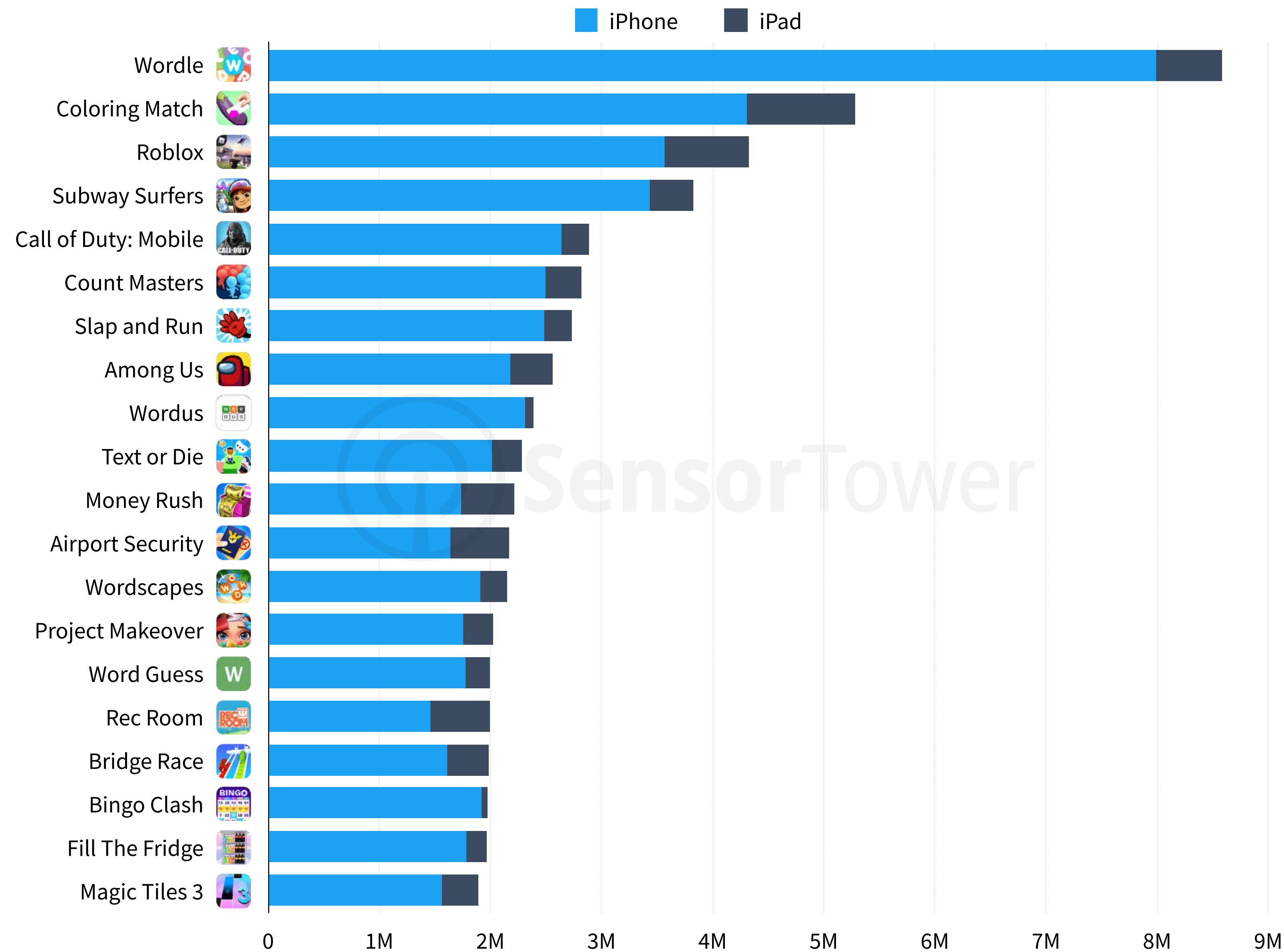
Wordle was the top game in the U.S. with more than 9 million downloads. The game added the six guess gameplay made popular by the web-based Wordle game in early February and was later acquired by Lion Studios.

Roblox has been a consistent top performer in the U.S., ranking among the top five games each quarter since Q4 2020. It was No. 3 last quarter with more than six million downloads and has had at least five million U.S. installs each quarter since Q3 2017.

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App Store - United States



Top Games by U.S. Downloads

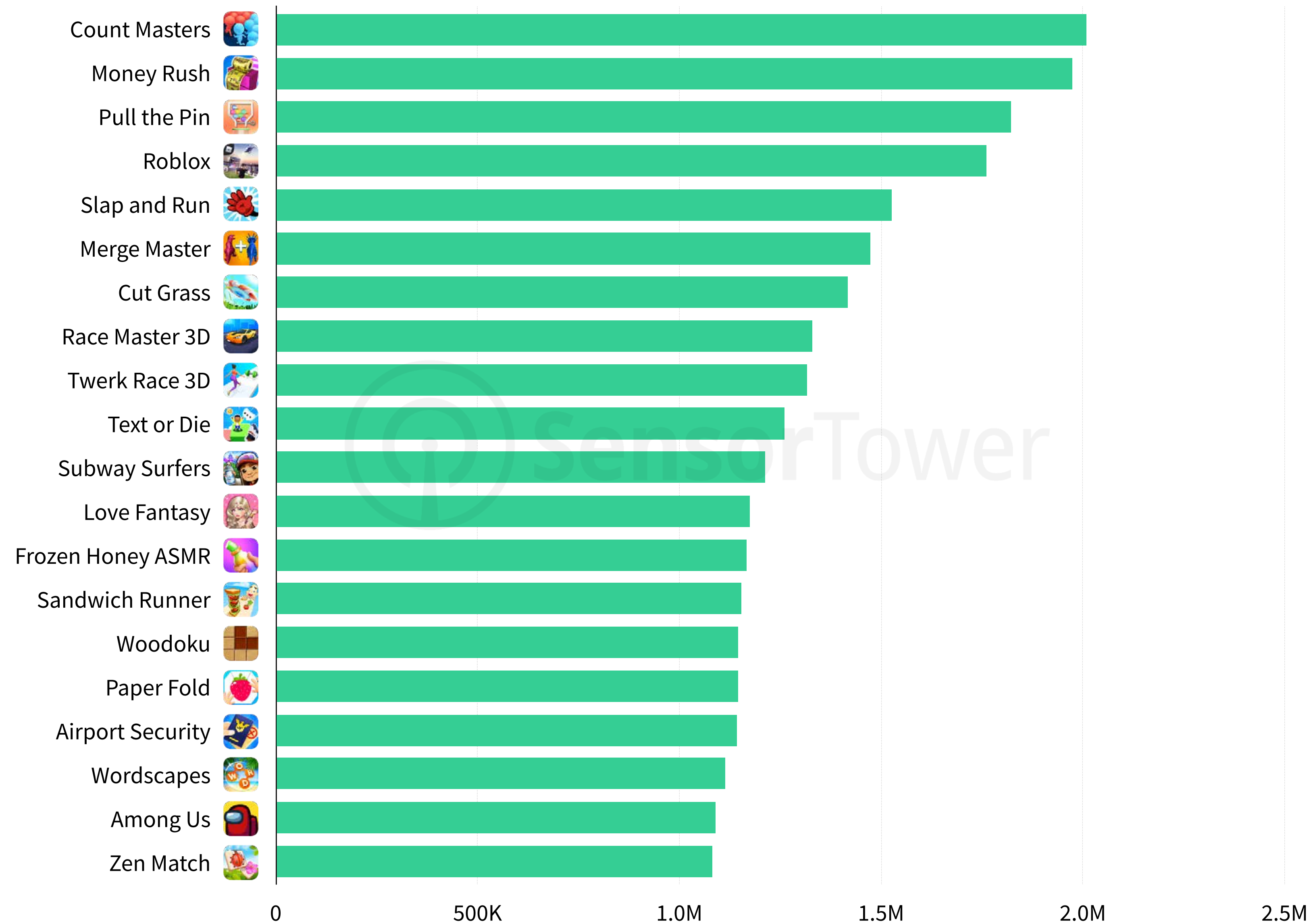
The viral web-based hit game Wordle also made a huge impact on the U.S. App Store market. The Wordle mobile game had the most U.S. App Store downloads since Among Us in Q4 2020. Wordus and Word Guess were other games with Wordle-style six guess gameplay that ranked among the top 20.

Among Us was another viral hit and it has managed to maintain high adoption following the initial buzz. It was among the top 10 every quarter since Q3 2020 except once (Q3 2021).

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Google Play - United States



Top Games by U.S. Downloads

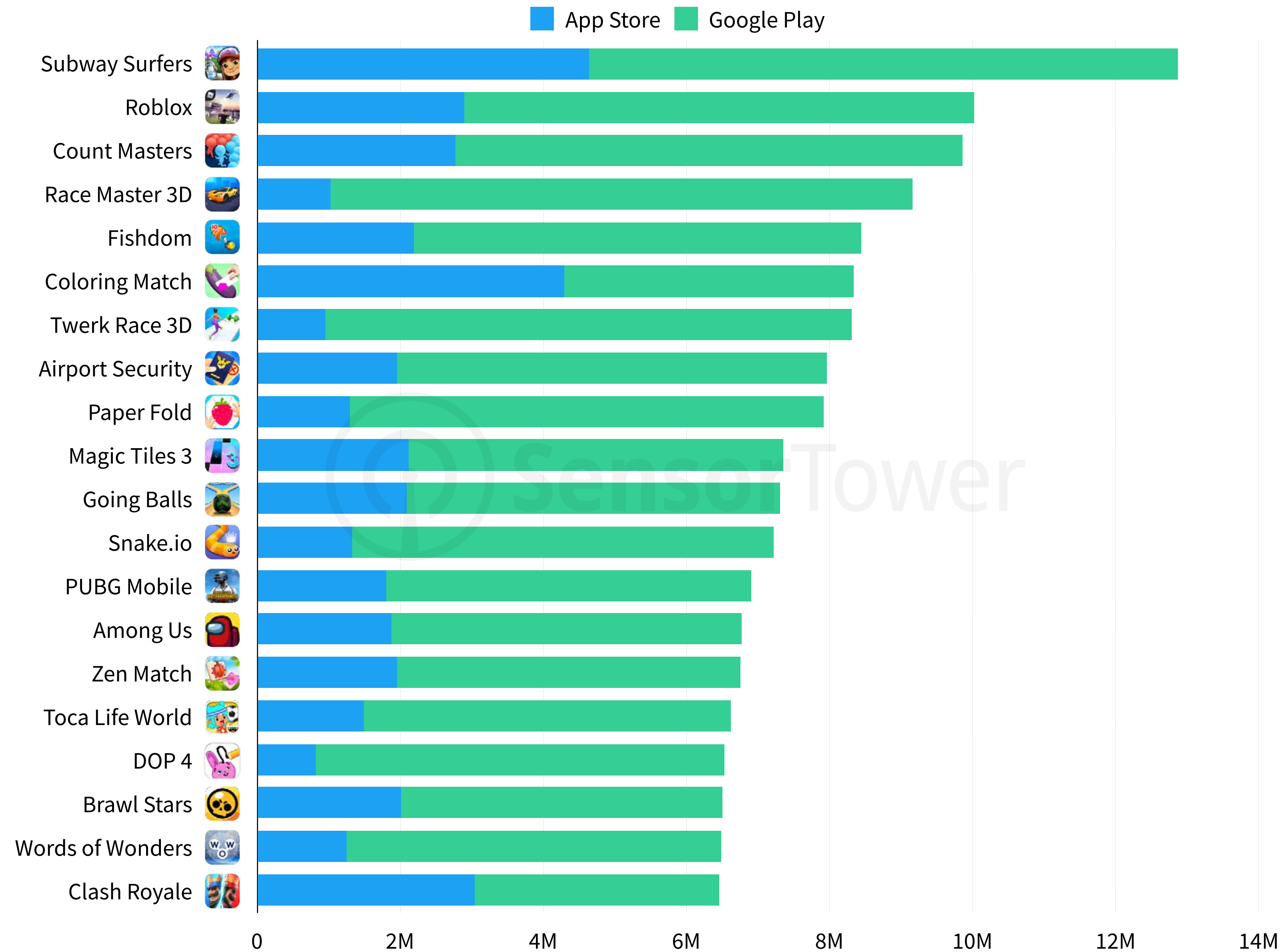
Hypercasual games continued to be more popular on Google Play, with the genre accounting for eight of the top 10 games in Q1 2022. Count Masters from Tap2Play, Money Rush from Zynga, and Pull the Pin from Popcore Games were all in the Hypercasual genre.

Count Masters has had an unusually long life for a Hypercasual game. It reached the No. 1 spot on Google Play after it ranked No. 3 all the way back in Q2 2021.

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Overall - Europe



Top Games by European Downloads

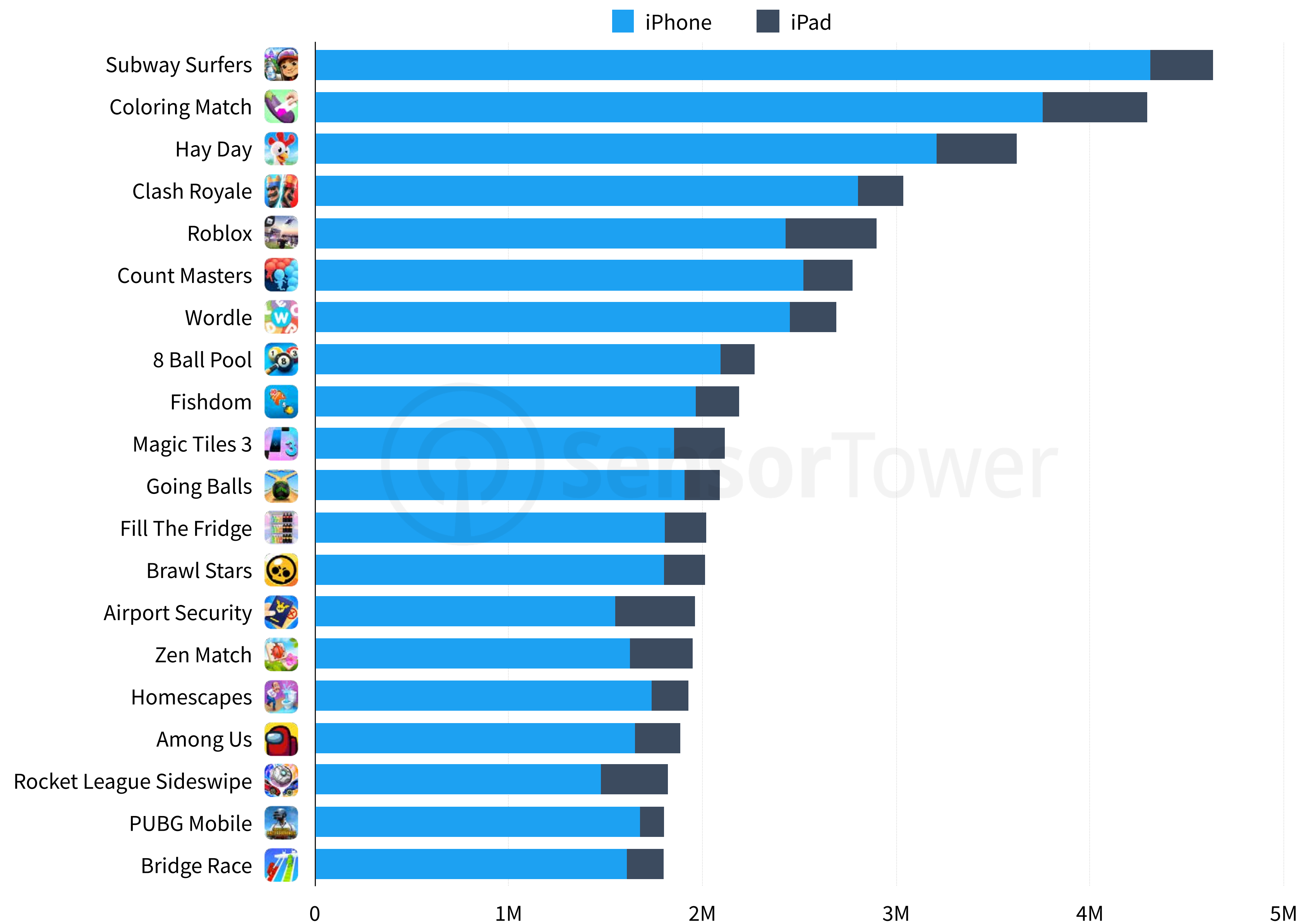
Subway Surfers had its best quarter in Europe since Q3 2020. Its nearly 13 million downloads were up 69 percent year-over-year and 29 percent quarter-over-quarter.

Meanwhile, Roblox ranked second for back-to-back quarters and it was the only other game to surpass 10 million downloads last quarter. Q1 2022 was its best quarter since Q3 2020 when it saw a boost early in the pandemic.

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App Store - Europe



Top Games by European Downloads

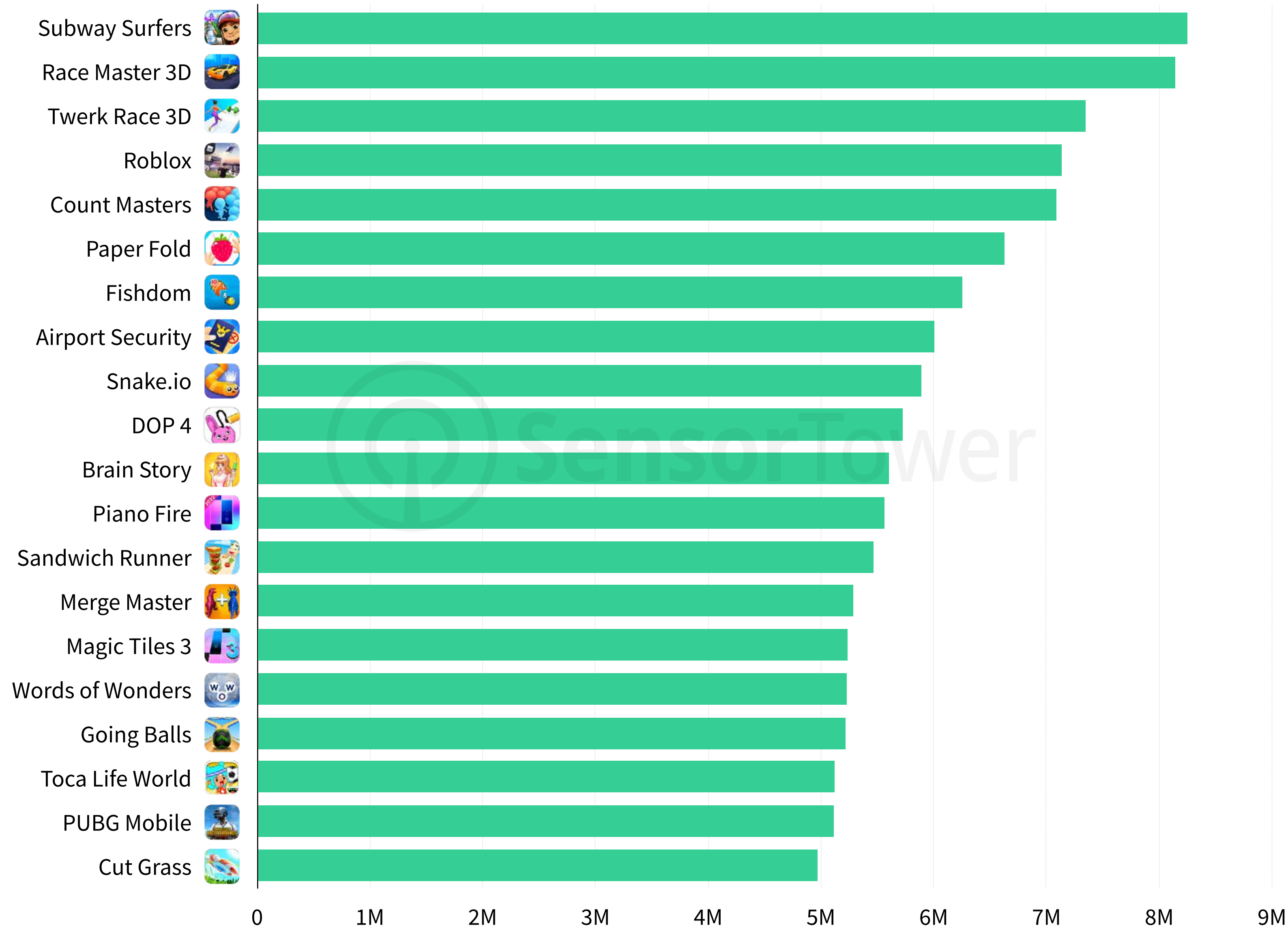
Supersonic Studios had three of the top games on the App Store, including Coloring Match at No. 2. Going Balls (No. 11) and Bridge Race (No. 20) were its other top games.

Rocket League Sideswipe was the No. 1 game in Q4 2021 quarter following its launch in late November with 3.7 million downloads. **While its adoption has declined since, it still ranked among the top 20 last quarter with nearly 2 million downloads in Europe.**

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Google Play - Europe



Top Games by European Downloads

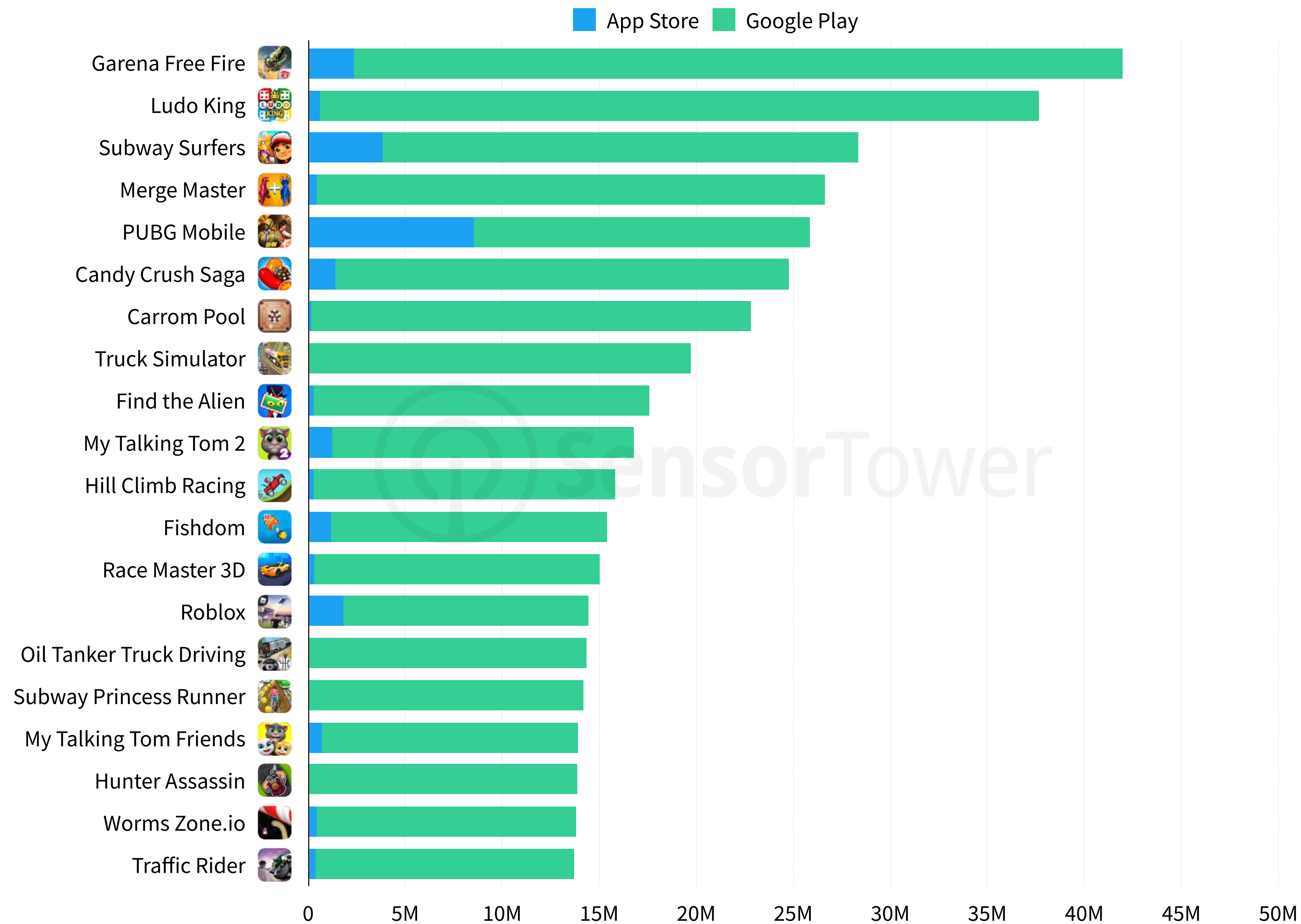
Subway Surfers climbed from No. 3 in Q4 2021 to the top position last quarter with 30 percent quarter-over-quarter growth. Race Master 3D from Say Games fell from No. 1 to 2, while Roblox also returned to top five.

Fishdom from Playrix had its best quarter since Q2 2020 and ranked among the top 10. Its 6.3 million downloads was an increase of 135 percent quarter-over-quarter.

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Overall - Asia



Top Games by Asia Downloads

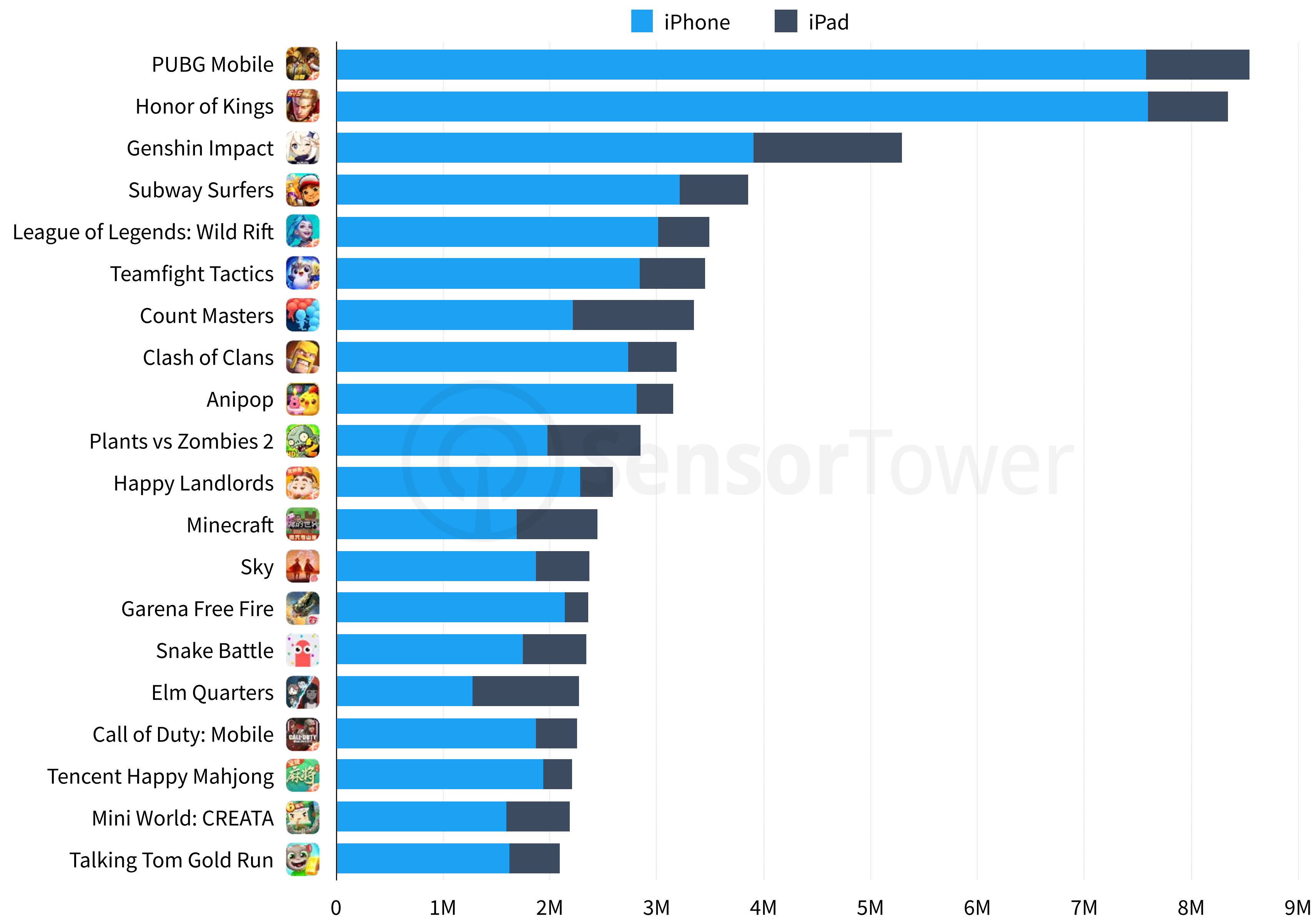
The top three games in Asia in Q1 2022 were the same as the previous quarter, with **Garena Free Fire leading Ludo King and Subway Surfers**. Garena Free Fire and Ludo King have been in a tight race since the start of 2019, with Garena Free Fire's 468 million installs edging Ludo King's 461 million since that time.

PUBG Mobile returned to the top five in Asia. India was its top market in the region with 39 percent of installs, followed by China at 23 percent from the App Store alone where the game is localized as Game for Peace.

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App Store - Asia



Top Games by Asia Downloads

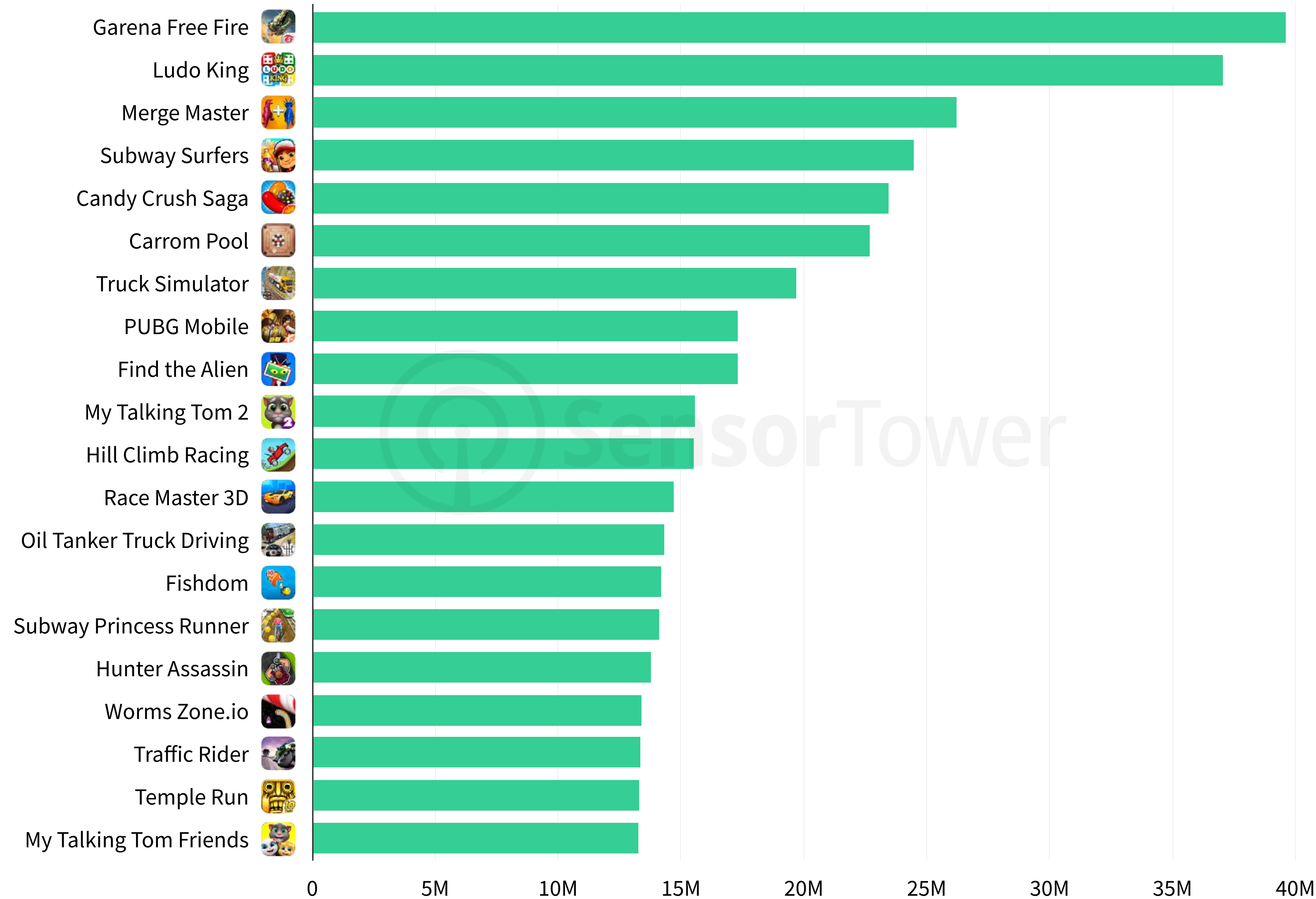
PUBG Mobile from Tencent took the top spot on the App Store with 37 percent quarter-over-quarter growth. Another Tencent title, Honor of Kings, also saw strong Q/Q growth at 32 percent.

League of Legends: Wild Rift, also from Tencent, followed up its huge launch in China last quarter with a return to the top five games. China accounted for more than 80 percent of its App Store installs in Asia in 1Q22.

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Google Play - Asia



Top Games by Asia Downloads

Garena Free Fire was the top game on Google Play for the second straight quarter, boosted by its release of Garena Free Fire MAX. More than 60 percent of its Google Play downloads in Asia were from Garena Free Fire MAX last quarter, with the original version taking the other 39 percent.

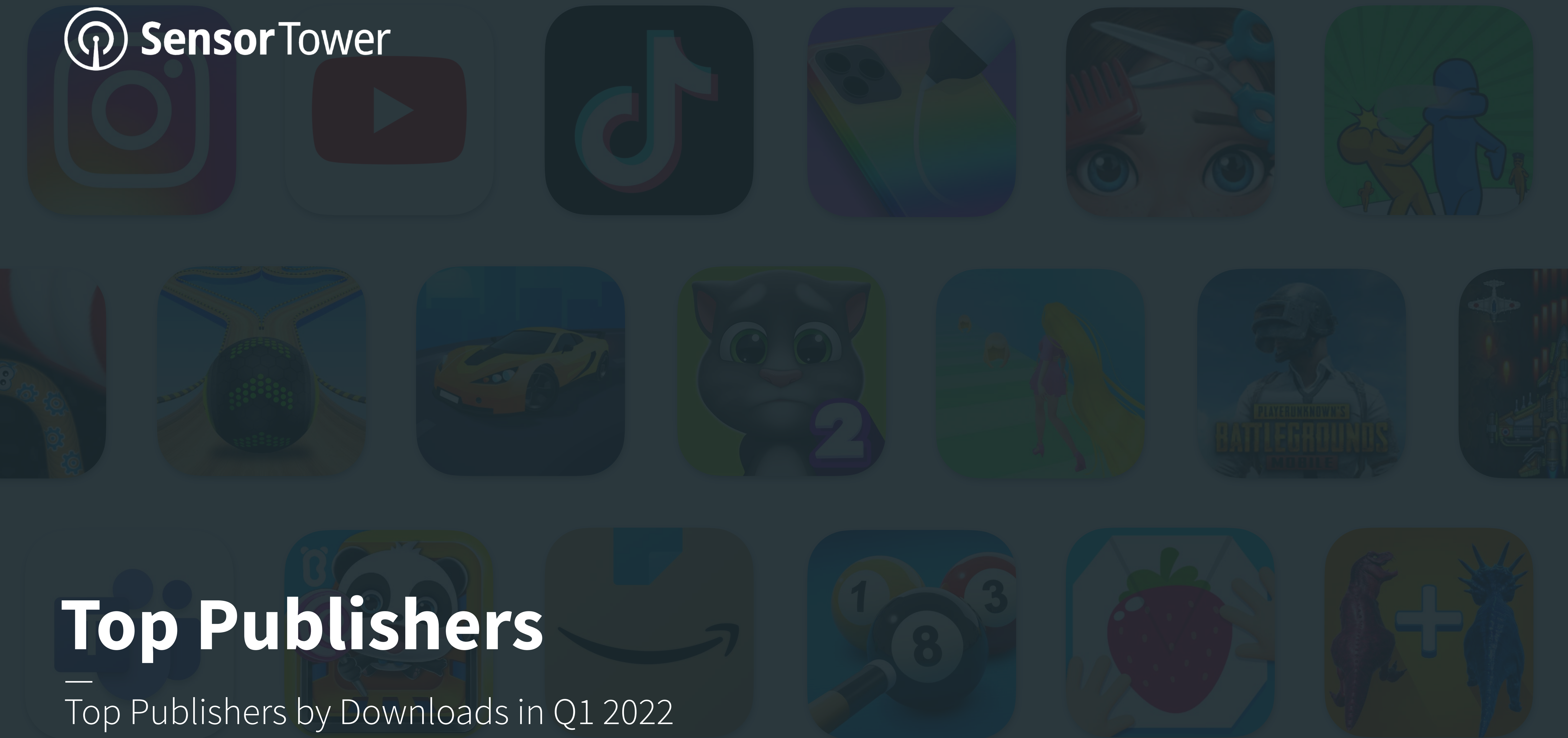
Candy Crush Saga also had a strong quarter in Asia ranking at No. 5. India was responsible for 66 percent of its installs in the region, followed by Indonesia at 12 percent.

Note Regarding Download Estimates

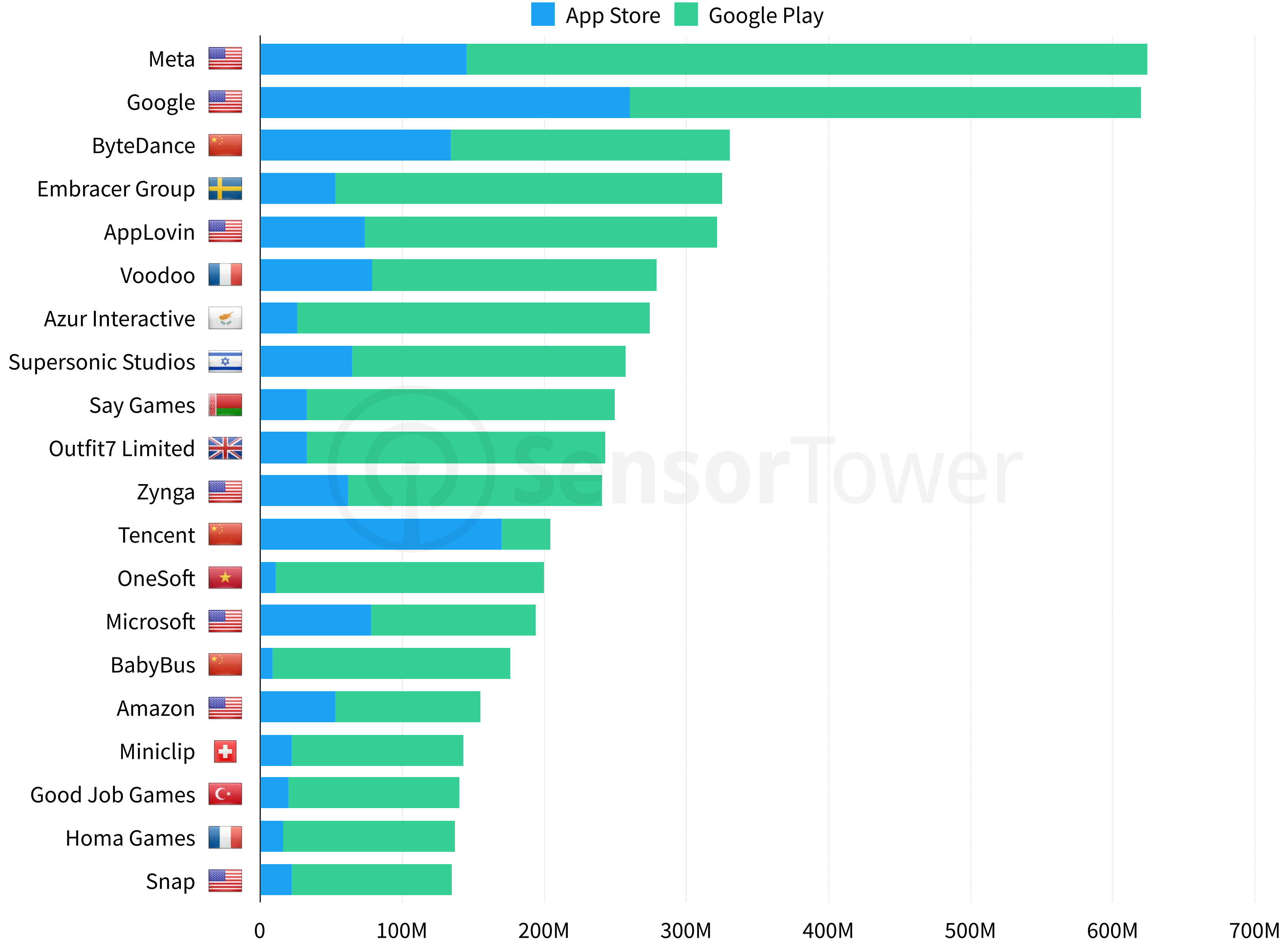
Our estimates include worldwide daily download totals for Google Play for Jan. 1 through Mar. 31, 2022. We report unique installs only (one download per User). Google preinstalled apps are excluded. Android download estimates do not include third-party stores. Figures represent aggregate installs of all app versions, ex: Facebook and Facebook Lite.

Top Publishers

Top Publishers by Downloads in Q1 2022



Overall - Worldwide



Top Publishers by Worldwide Downloads

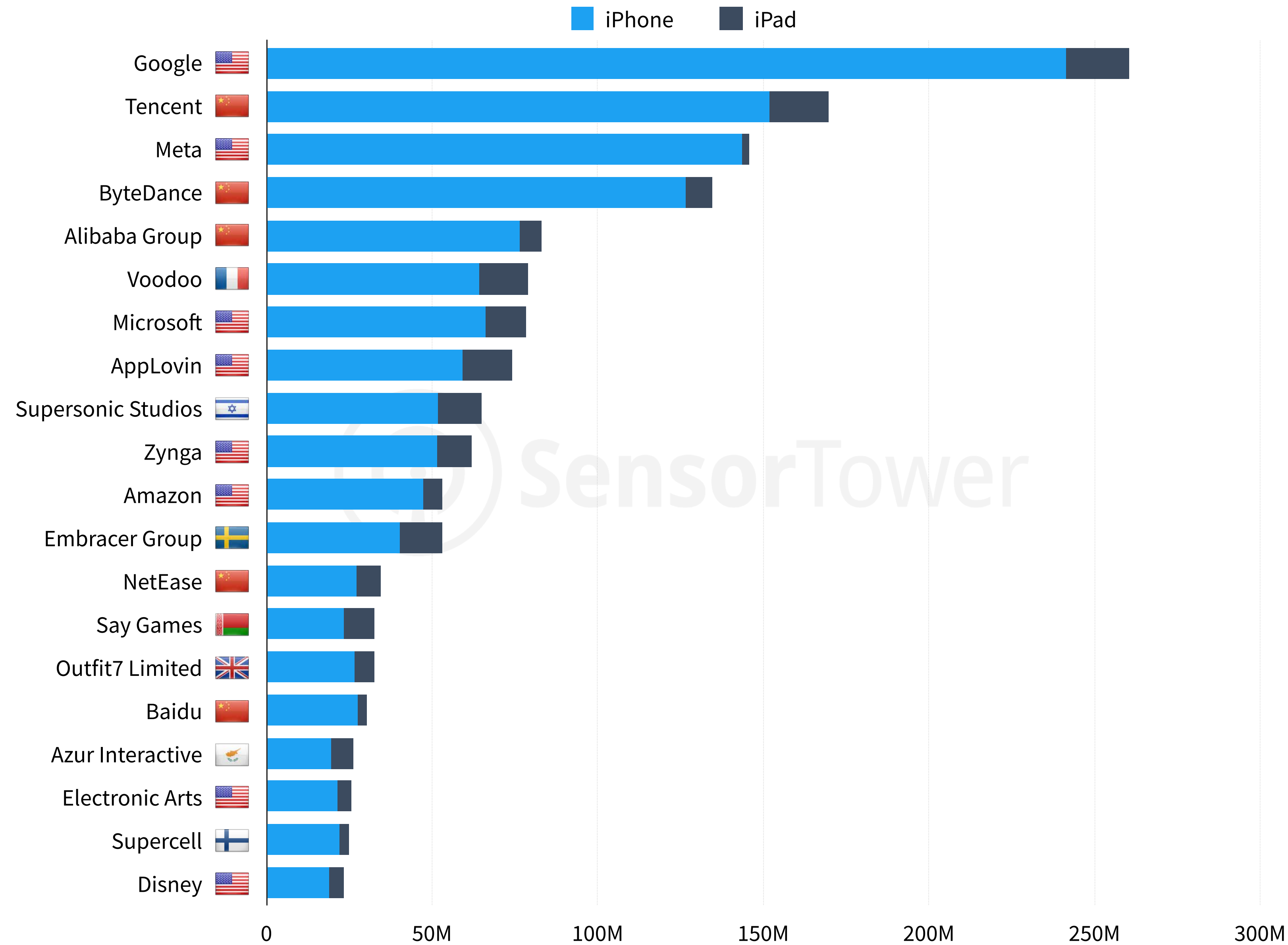
Meta was the top publisher for the first time since Q1 2020. The battle for the top spot in Q1 2022 was very tight, with Meta and Google separated by just four million downloads.

While the top three publishers saw the majority of their downloads from non-games, the rest of the top 10 were all primarily game publishers. These game publishers also had a fairly global presence, with the group headquartered in seven different countries.

Note Regarding Download Estimates
 Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1 through Mar. 31, 2022. Apple apps and Google pre-installed apps are excluded. We report unique installs only. Android estimates do not include third-party stores.



App Store - Worldwide



Top Publishers by Worldwide Downloads

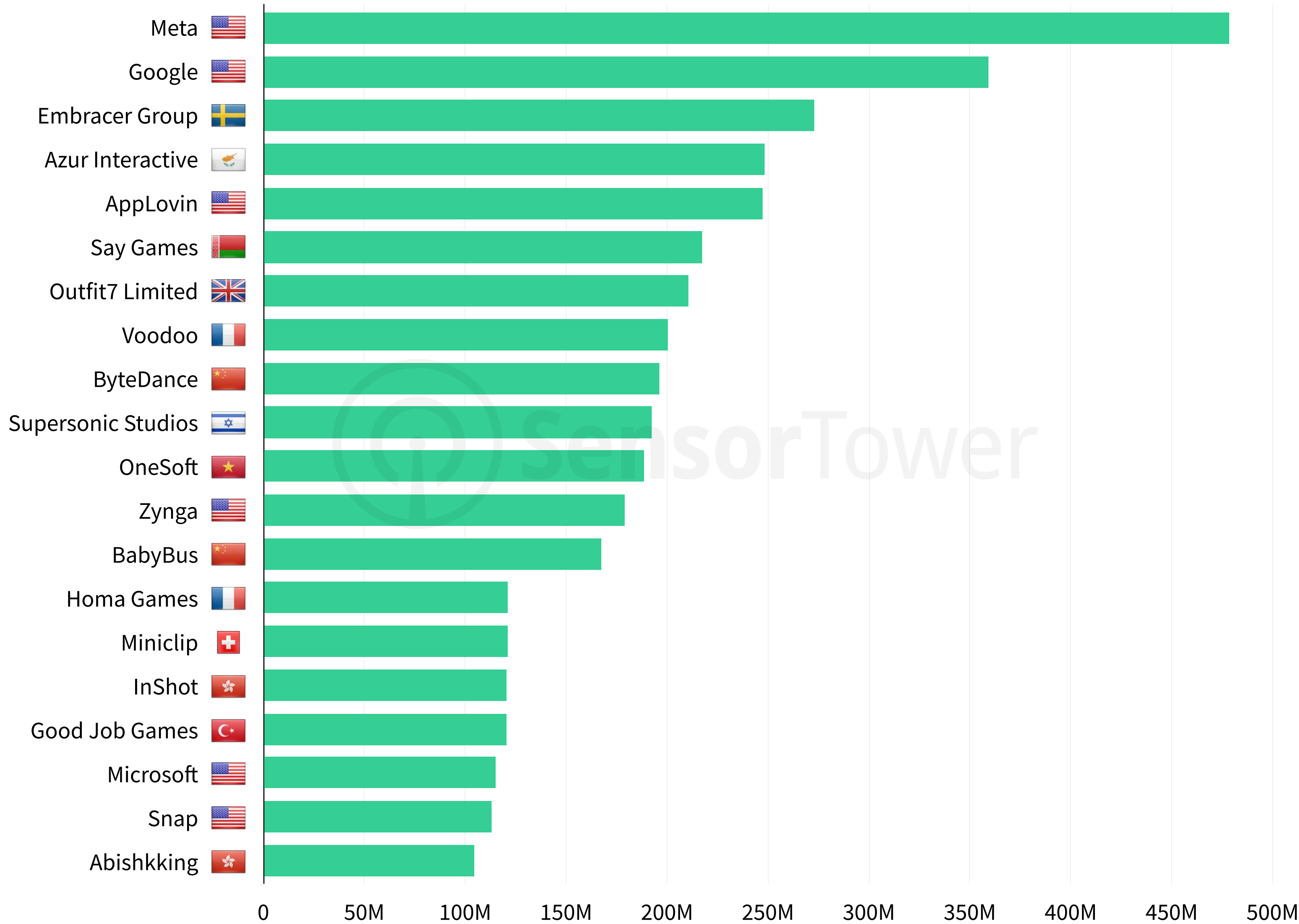
The top three publishers were the same as last quarter, with Google leading Tencent and Meta. The only change among the top five was Alibaba Group passing Voodoo.

Hypercasual games developer Voodoo was the top publisher not based in the U.S. or China, reflecting the challenge for publishers outside of the App Store's two largest markets to break through, especially for non-games.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Jan. 1 through Mar. 31, 2022. Apple apps are excluded. We report unique installs only (one download per User).

Google Play - Worldwide



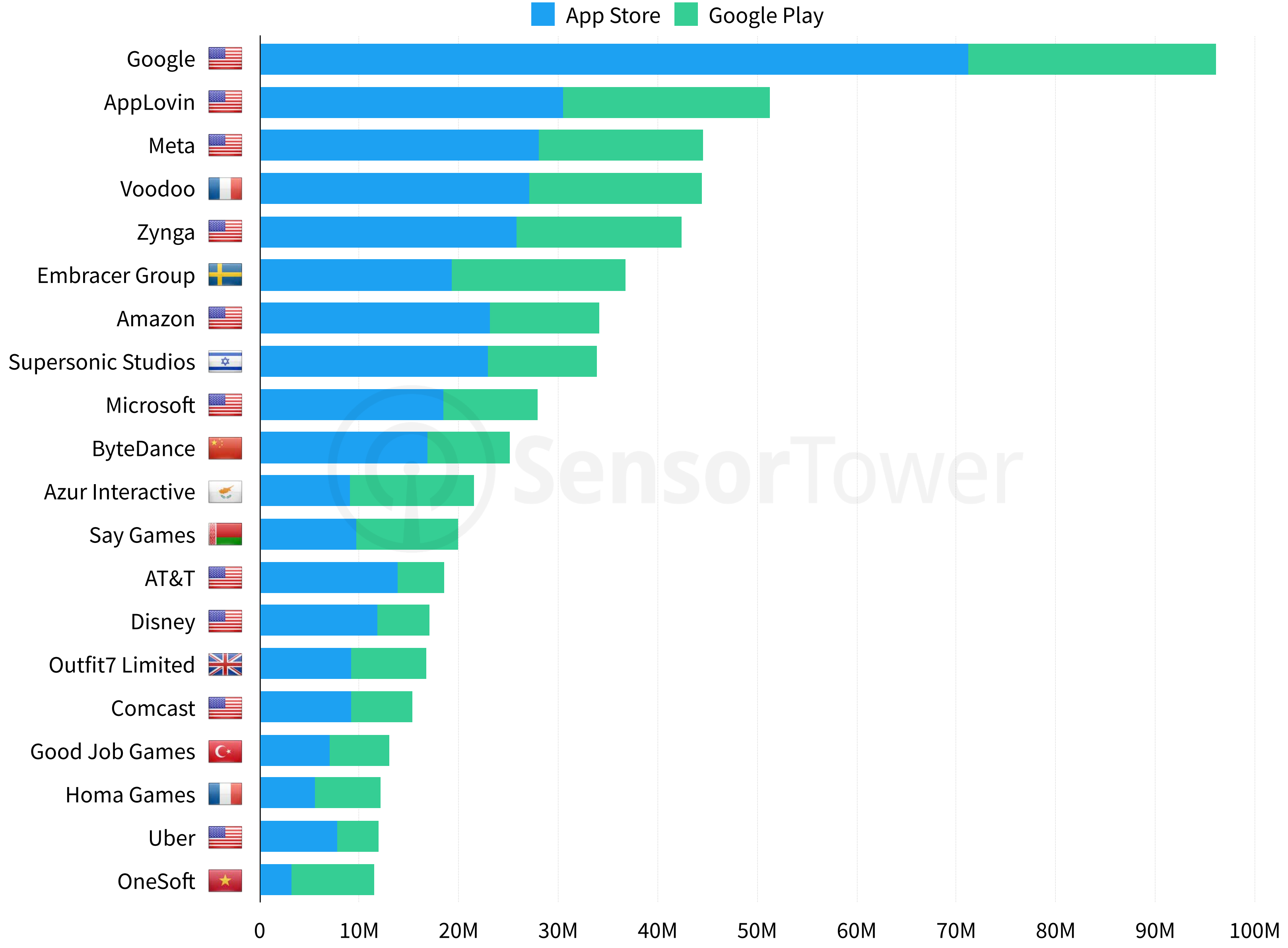
Top Publishers by Worldwide Downloads

Meta’s Google Play installs have climbed steadily since Q2 2021, reaching 478 million in Q1 2022. India remained its top market, followed by Indonesia and Brazil.

Embracer Group, owner of various games studios including Crazy Labs, Deca Games, TabTale, and Easybrain, ranked in the top three. Its Google Play downloads were up nearly 5 percent quarter-over-quarter.

Note Regarding Download Estimates
 Our estimates include worldwide daily download totals for Google Play for Jan. 1 through Mar. 31, 2022. We report unique installs only (one download per User). Google preinstalled apps are excluded. Android download estimates do not include third-party stores.

Overall - United States



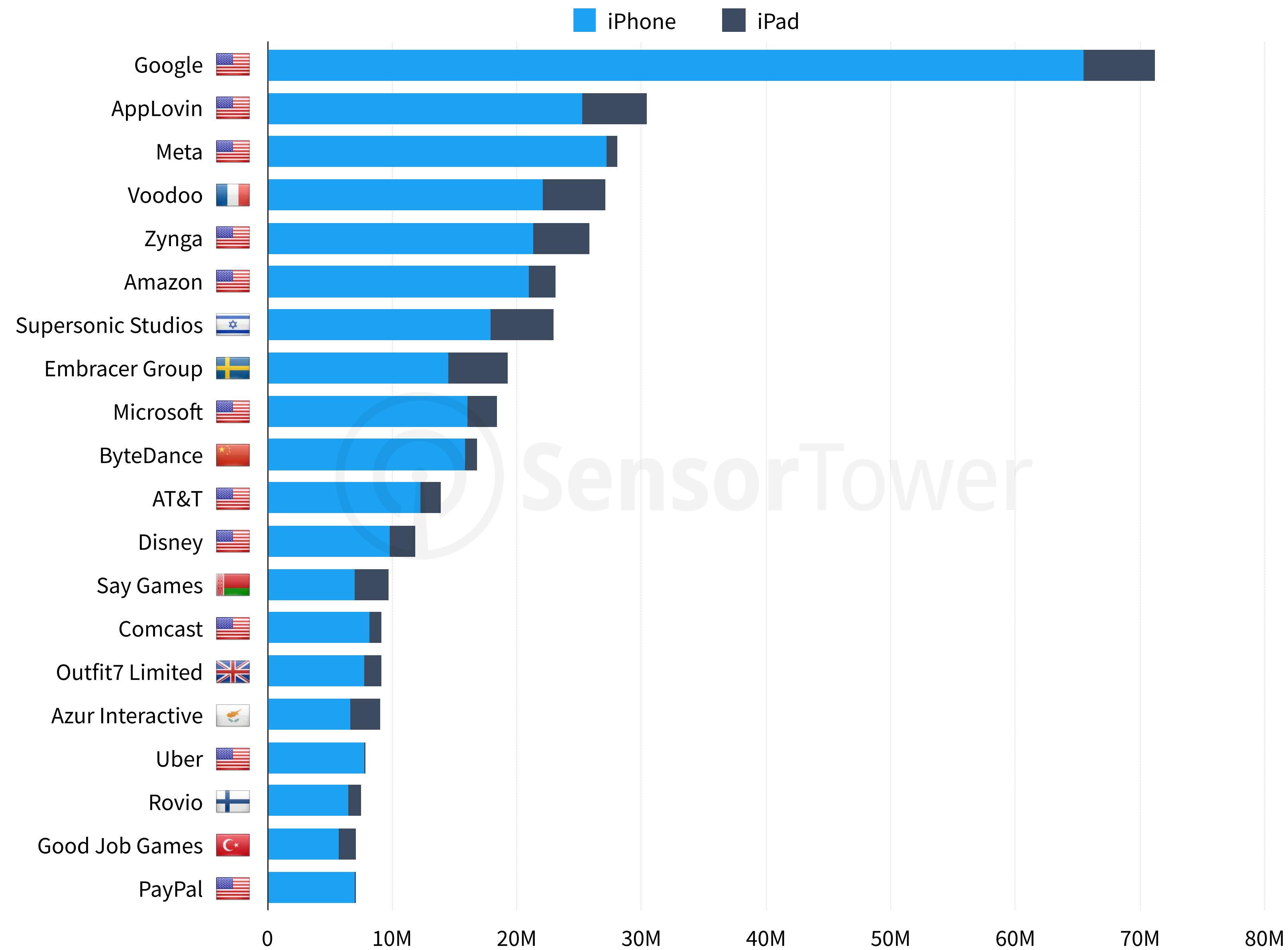
Top Publishers by U.S. Downloads

While Google’s installs have declined since the start of the COVID-19 pandemic, it remained far-and-away the top publisher in the U.S. with 96 million downloads. The No. 2 publisher, AppLovin, was well behind at 51 million downloads.

No publisher had more growth in the U.S. than Outfit7, which saw downloads more than double quarter-over-quarter to 16.8 million. Talking Ben the Dog was its top game with 4.8 million downloads in the quarter.

Note Regarding Download Estimates
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App Store - United States



Top Publishers by U.S. Downloads

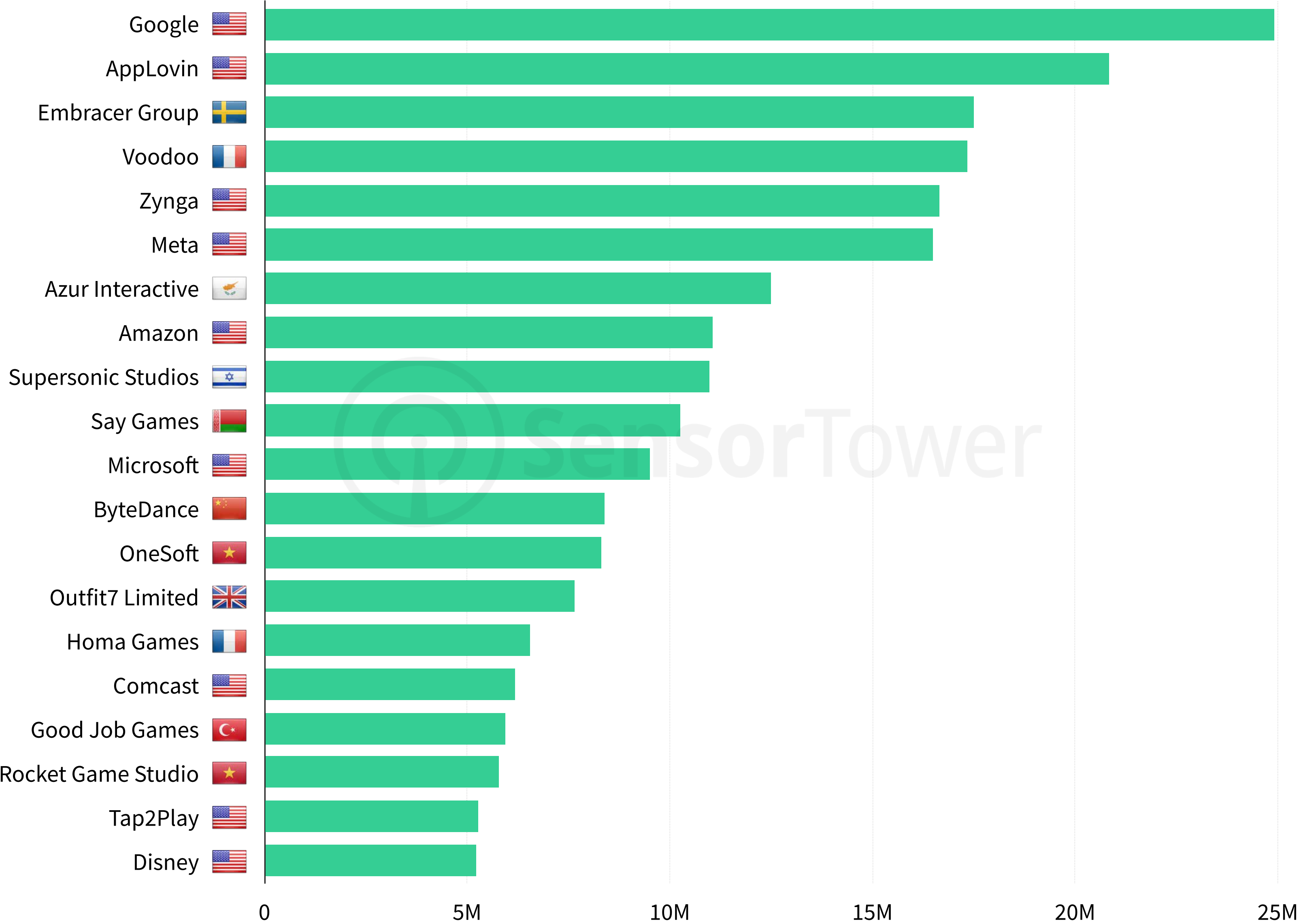
Google had more installs than the next two largest publishers combined in Q1 2022. It surpassed 70 million downloads each quarter since Q1 2020.

AppLovin ranked second in Q1 2022, boosted by its acquisition of the Wordle mobile game. Wordle alone accounted for 28 percent of AppLovin's App Store downloads, and Wordle had more than four times the downloads of AppLovin's second best game, Wordscapes.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Jan. 1 through Mar. 31, 2022. Apple apps are excluded. We report unique installs only (one download per User).

Google Play - United States



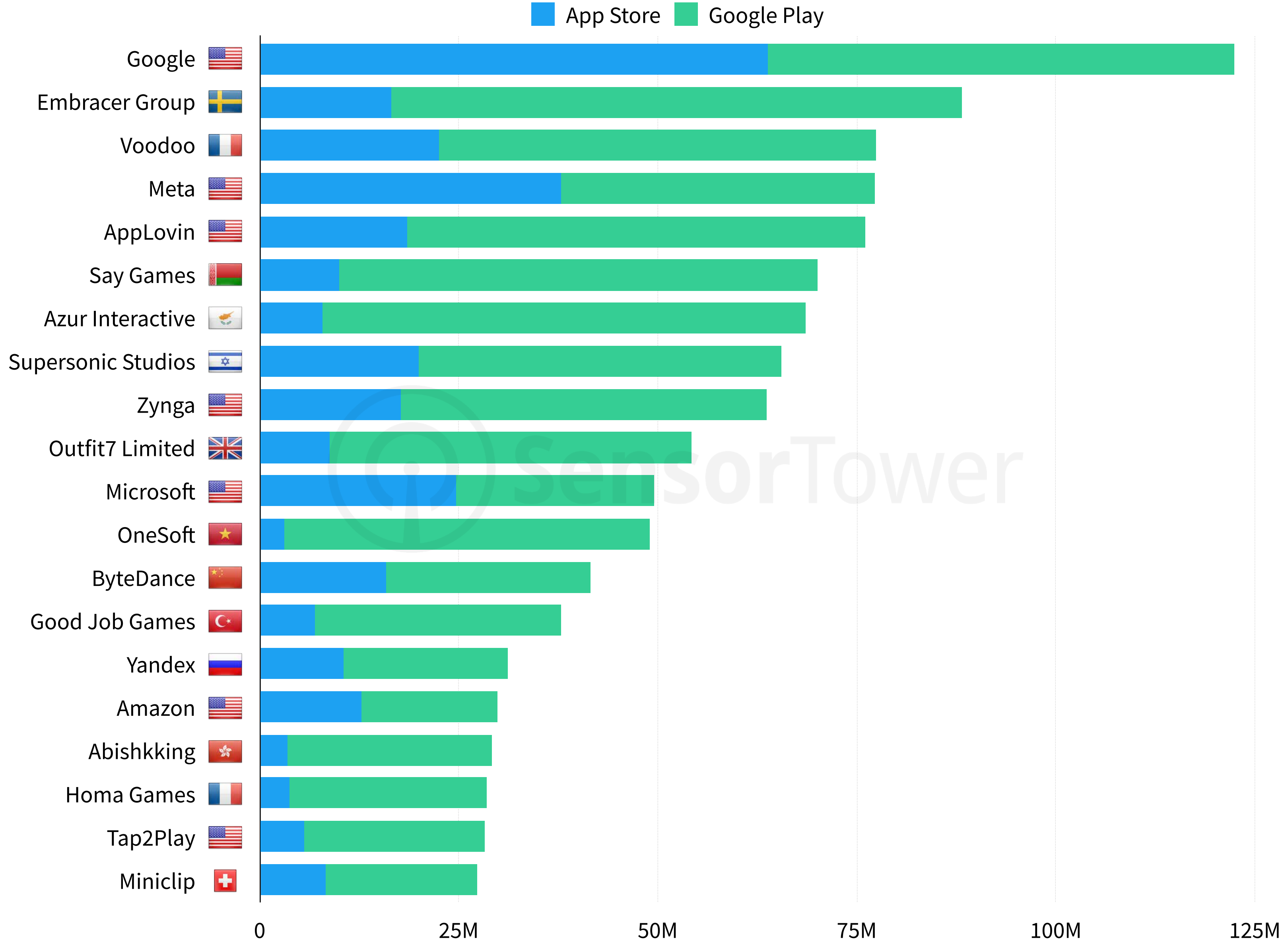
Top Publishers by U.S. Downloads

The top five publishers remained the same as from Q4 2021, with the only change in the order being Embracer Group and Voodoo flipping positions. Meta ranked just outside the top five with 16.5 million downloads.

Embracer Group continued its ascent on Google Play with its best quarter since Q2 2020. It had 11 different games with at least 500 thousand U.S. downloads on Google Play in Q1 2022, led by Frozen Honey ASMR.

Note Regarding Download Estimates
 Our estimates include worldwide daily download totals for Google Play for Jan. 1 through Mar. 31, 2022. We report unique installs only (one download per User). Google preinstalled apps are excluded. Android download estimates do not include third-party stores.

Overall - Europe



Top Publishers by European Downloads

Google continued its reign as the top publisher in Europe, with 30 different apps surpassing one million downloads for the quarter.

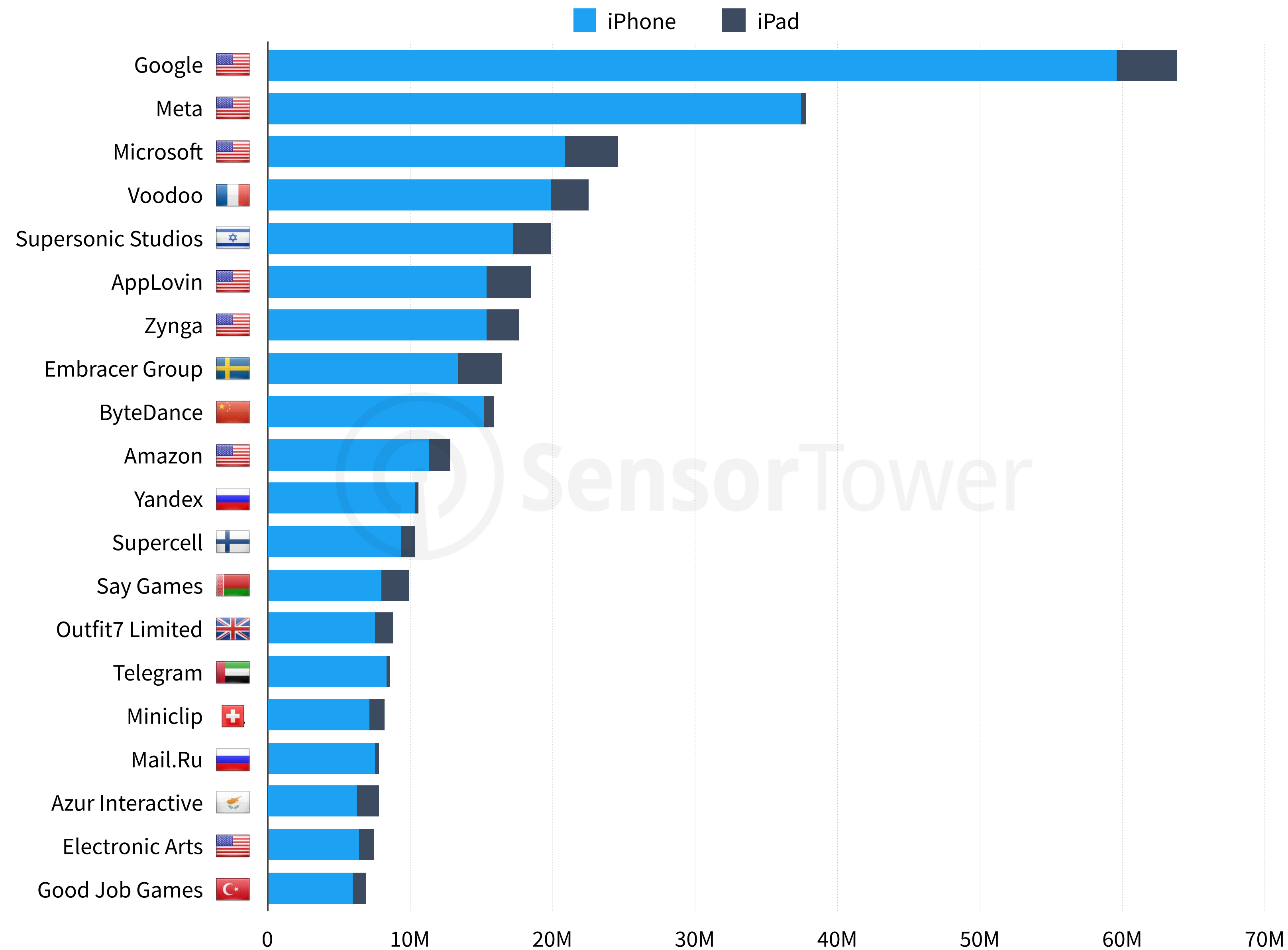
YouTube, Google Maps, and Google Translate were its top apps in the region.

Outfit7 and Good Job Games each saw downloads climb by nearly 19 million from the previous quarter. Tap2Play and Supersonic Studios also had download growth of more than 10 million.

Note Regarding Download Estimates
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App Store - Europe



Top Publishers by European Downloads

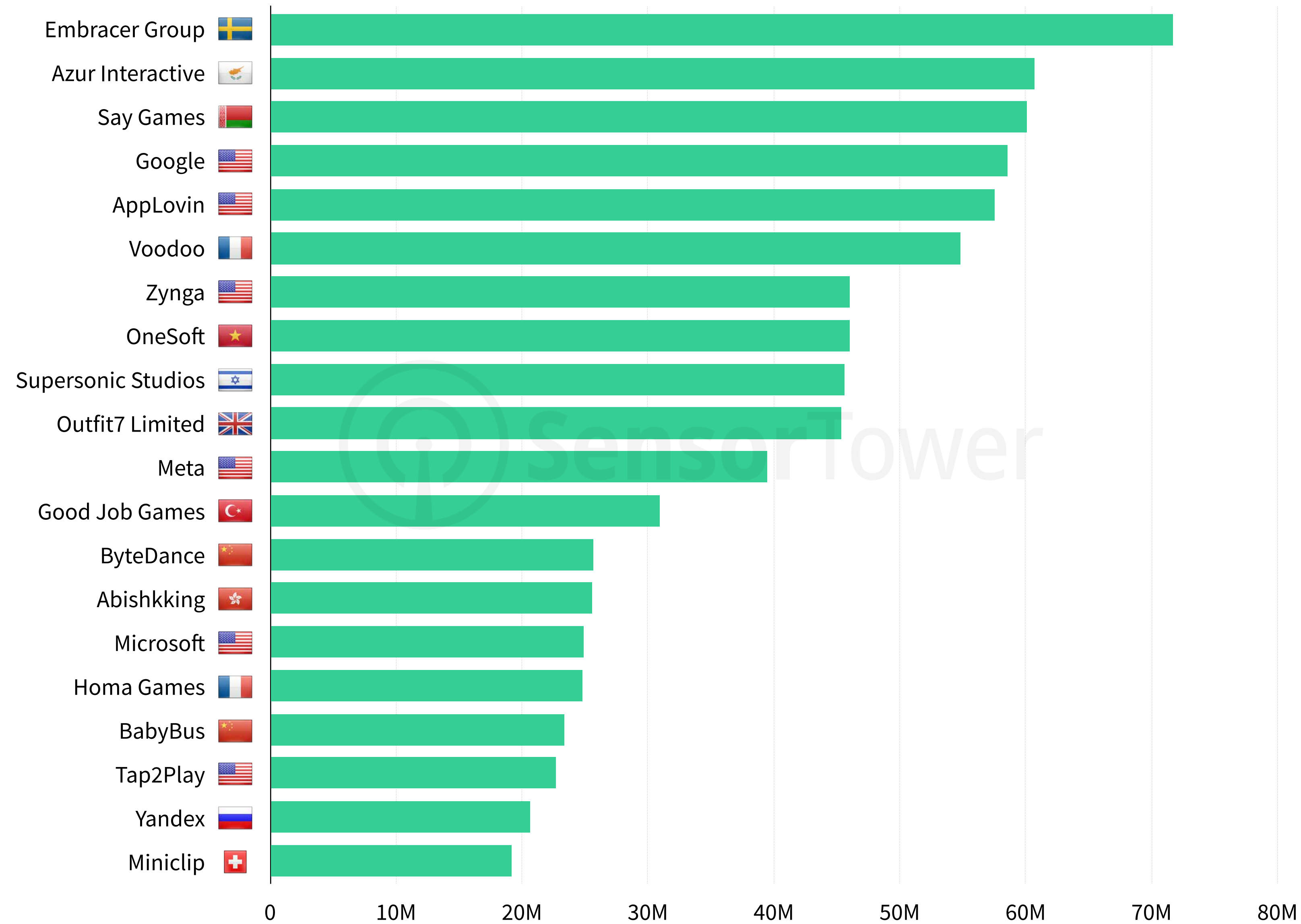
More than half of the top 10 publishers are headquartered in the U.S., with Google, Meta, and Microsoft leading the way. Other top publishers included Voodoo from France, Supersonic Studios from Israel, and ByteDance from China.

Supersonic Studios had the highest growth among the top five publishers, with installs up 33 percent quarter-over-quarter. The publisher moved up three spots after ranking eighth last quarter.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Jan. 1 through Mar. 31, 2022. Apple apps are excluded. We report unique installs only (one download per User).

Google Play - Europe



Top Publishers by European Downloads

Embracer Group was the fourth straight mobile games publisher to take the No. 1 spot on Google Play, following AppLovin in 2Q21, Voodoo in 3Q21, and Say Games in 4Q21.

Europe remains a top market for game developers on Google Play, with nine of the top 10 publishers focusing on games.

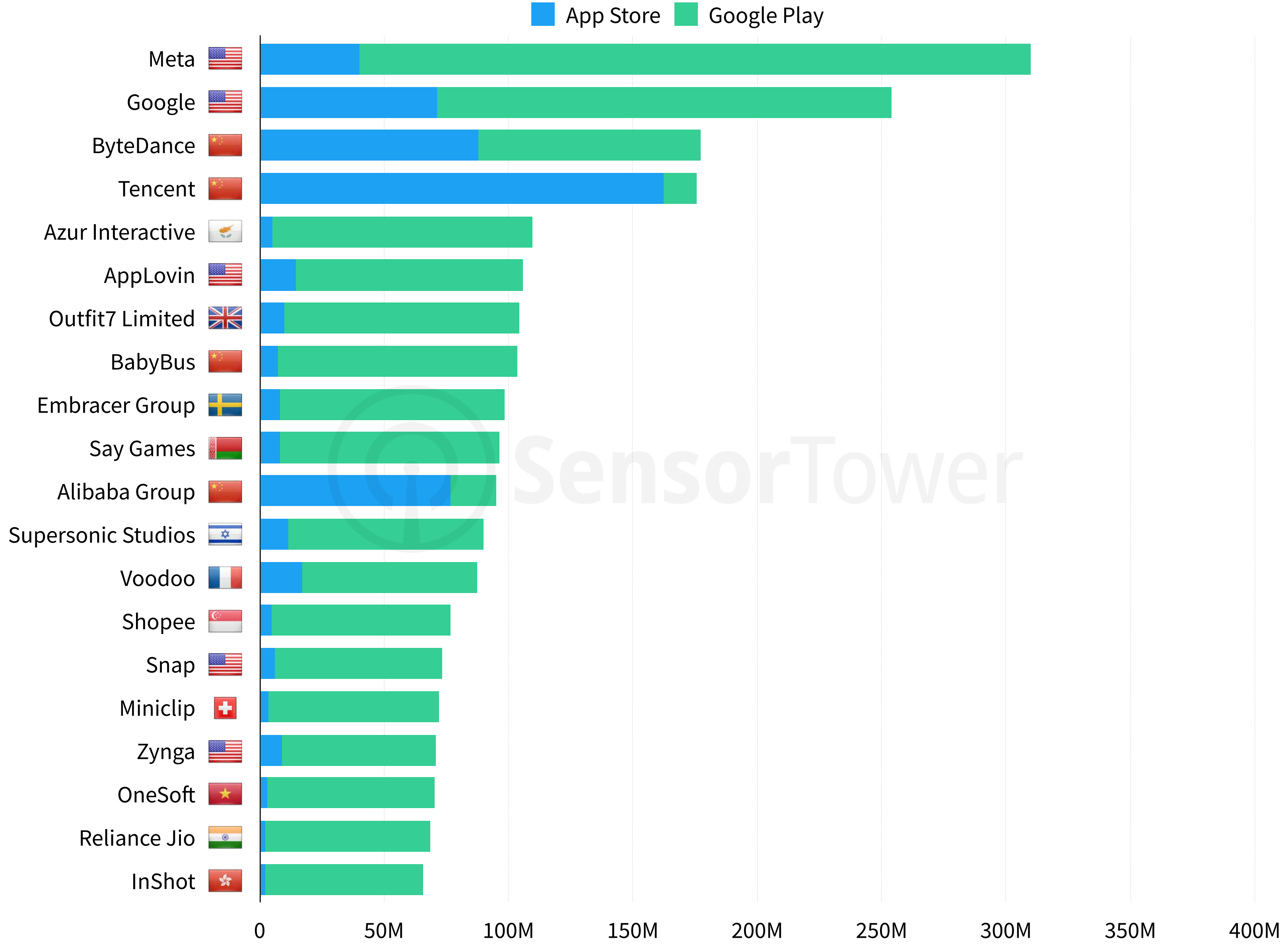
Google was the only publisher among the top 10 that was not focused on mobile games.

Meta, ByteDance, and Microsoft ranked just outside the top 10.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for Google Play for Jan. 1 through Mar. 31, 2022. We report unique installs only (one download per User). Google preinstalled apps are excluded. Android download estimates do not include third-party stores.

Overall - Asia



Top Publishers by Asia Downloads

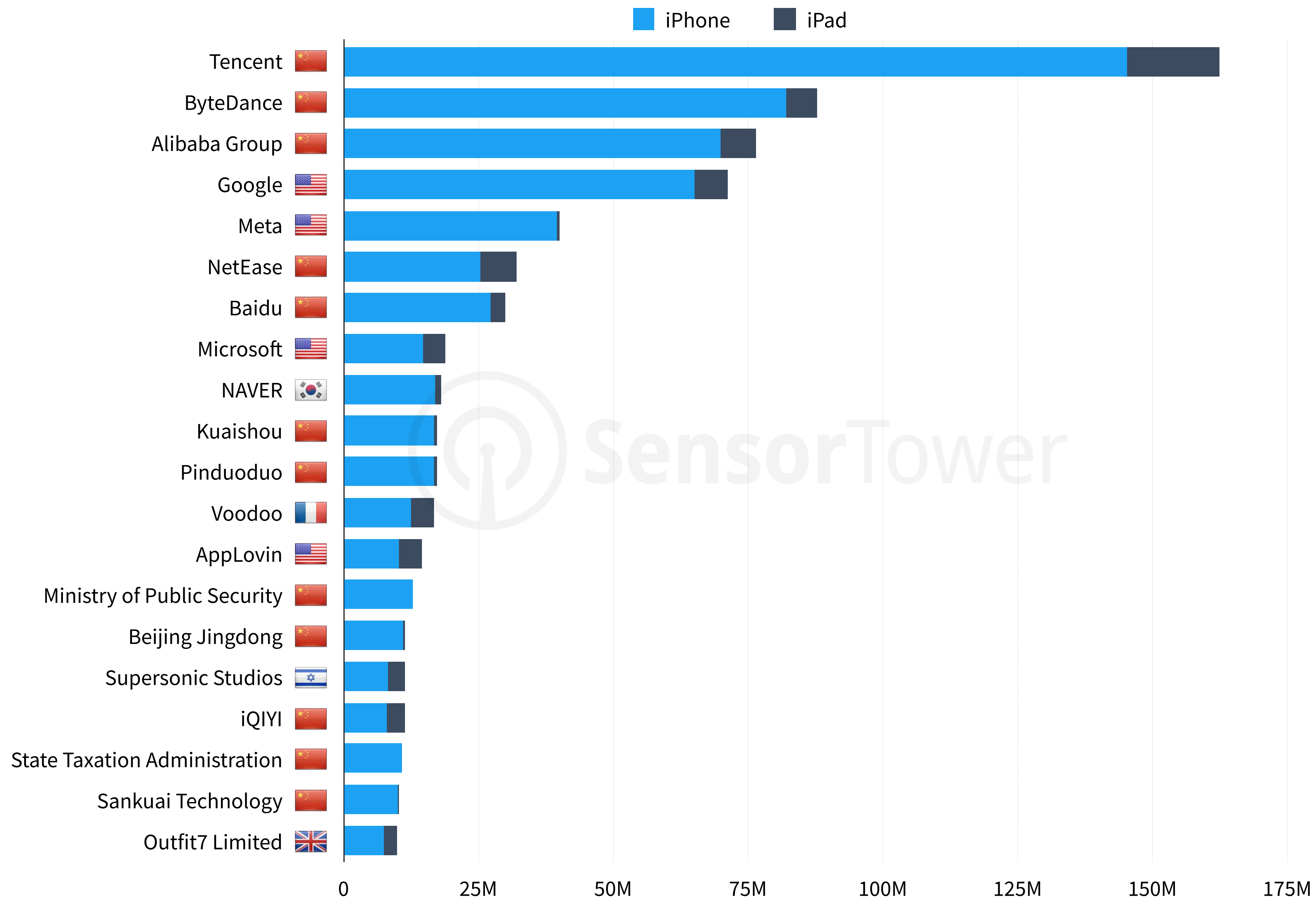
Meta surpassed 300 million installs in Asia for the fourth straight quarter and was once again the top publisher in the region. Instagram was its top app in Q1 2022, followed by Facebook and WhatsApp.

ByteDance’s installs in Asia climbed by 30 million from Q4 2021, or 21 percent growth. CapCut accounted for more than half of this growth, while TikTok’s installs were up 11 million quarter-over-quarter.

Note Regarding Download Estimates
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App Store - Asia



Top Publishers by Asia Downloads

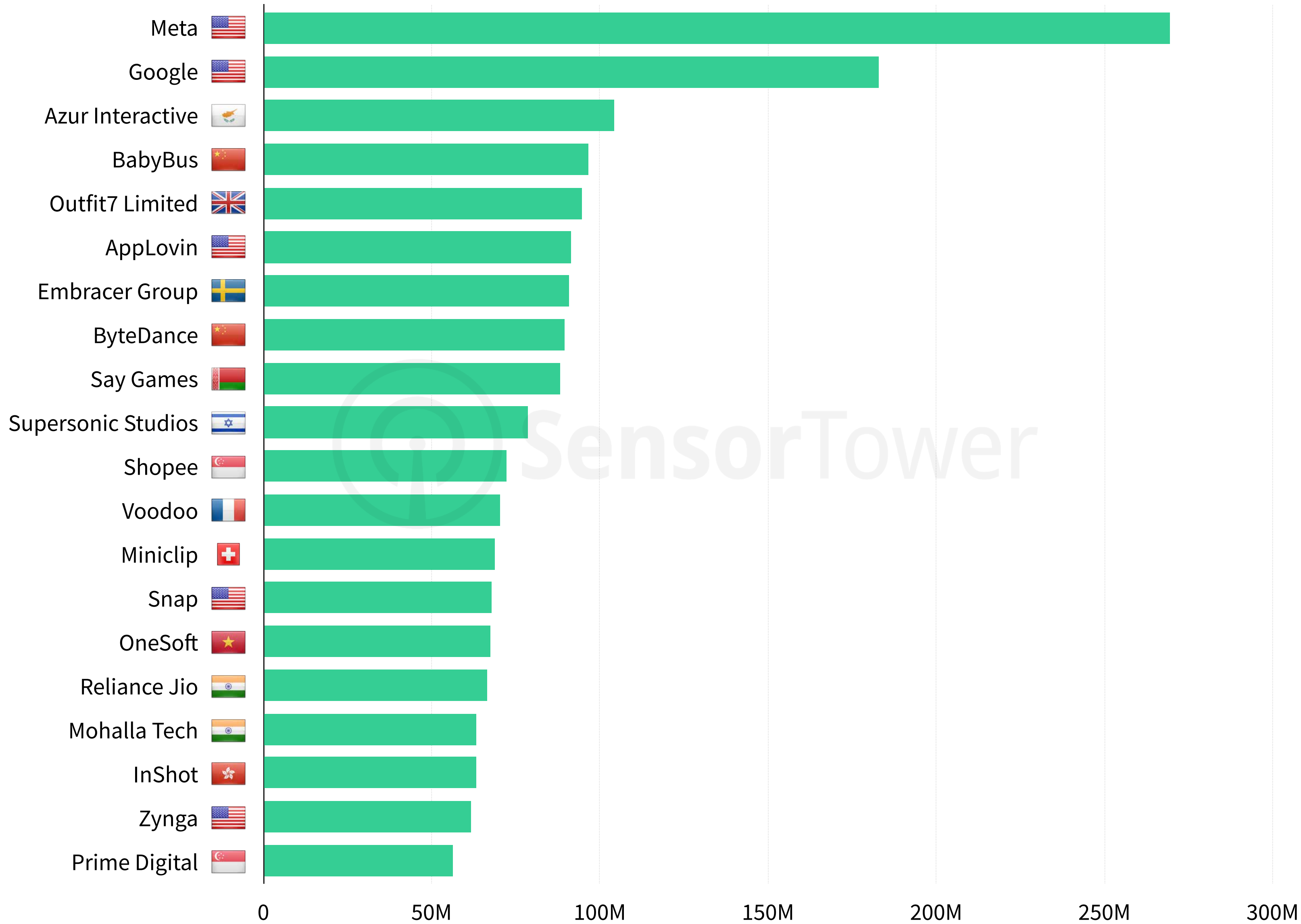
Tencent was the only publisher to reach 100 million App Store downloads in Asia last quarter with 162 million. Video conferencing app VooV Meeting saw its adoption climb 126 percent quarter-over-quarter as demand for such apps increased due to concerns about COVID-19 in China.

Alibaba Group passed Google to rank among the top three publishers last quarter. DingTalk was the publisher's second best app in Q1 2022, also seeing strong growth as a tool for remote work and communication during COVID-19.

Note Regarding Download Estimates

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Google Play - Asia



Top Publishers by Asia Downloads

Meta had another strong quarter on Google Play with 270 million downloads in Asia. It is in a good position to surpass a billion downloads again in 2022.

ByteDance managed to rank among the top 10 despite its top apps being banned in India. Indonesia accounted for 45 percent of its Google Play installs in Asia, followed by Pakistan (15 percent) and Vietnam (12 percent).

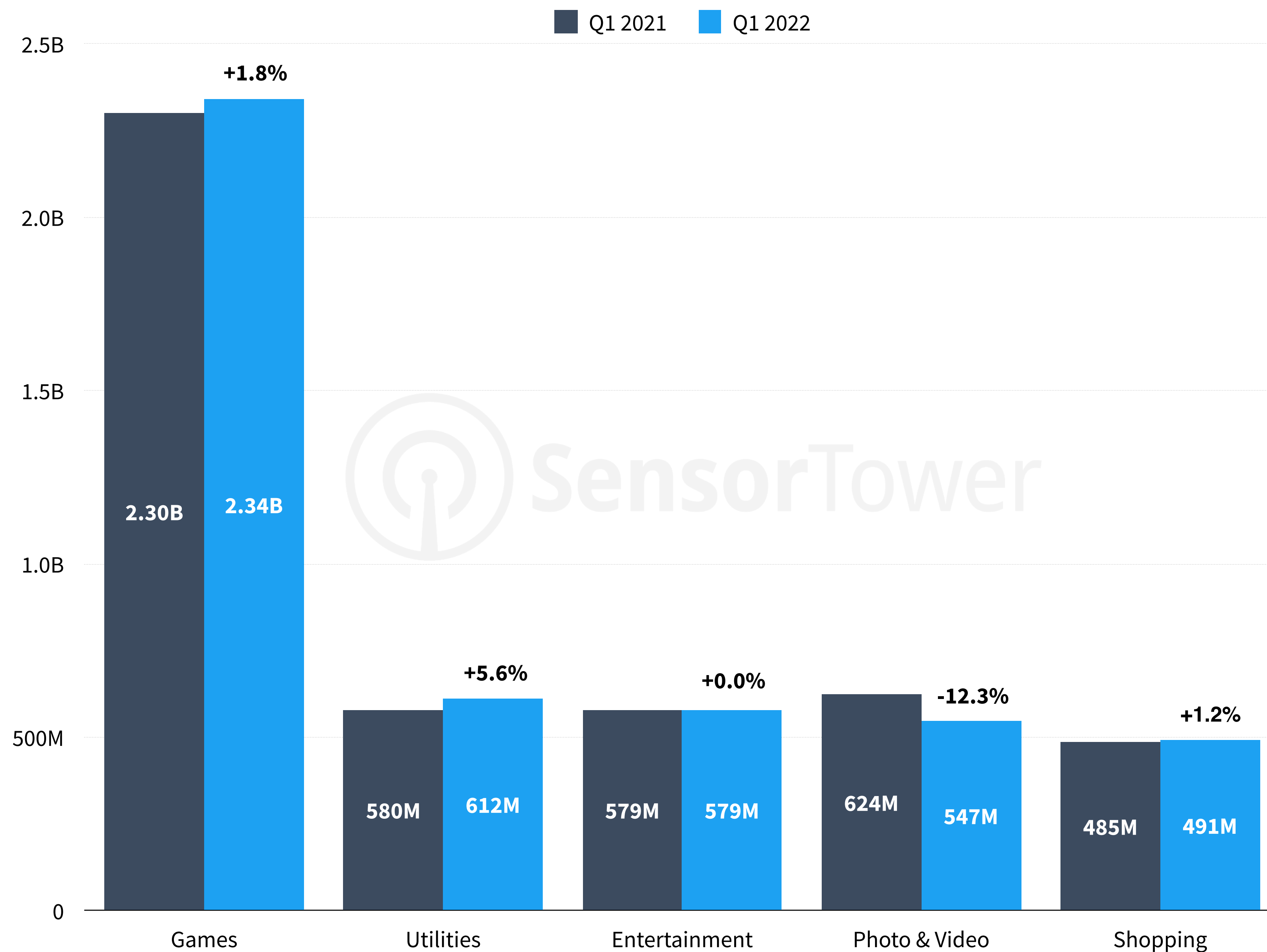
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Top Categories

Top Categories by Downloads in Q1 2022

App Store



Top Categories by Worldwide Downloads

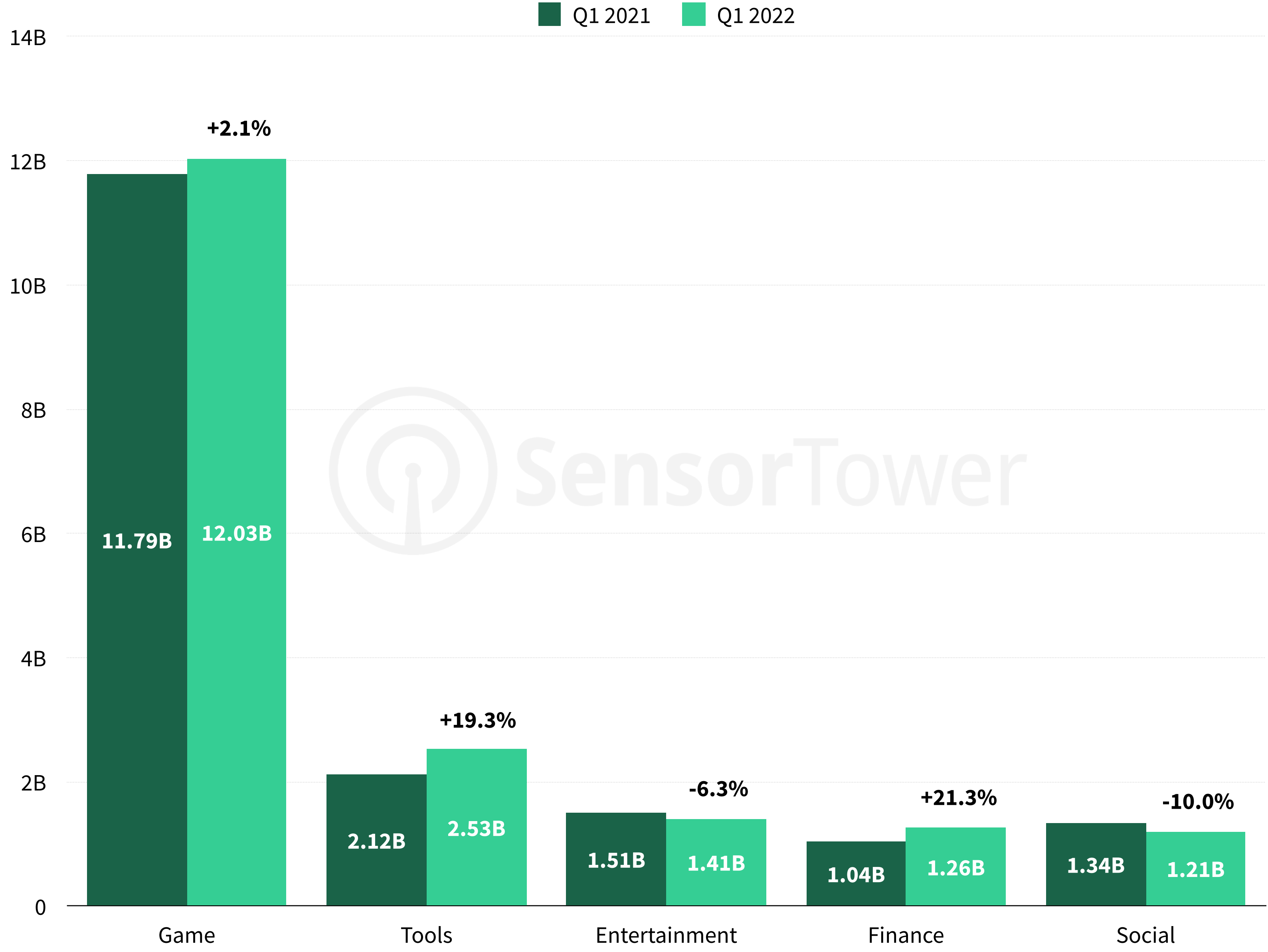
Game installs showed signs of recovery after falling from the peak seen early in the COVID-19 pandemic. The category had positive quarter-over-quarter growth each of the past three quarters, and downloads were up nearly 2 percent year-over-year.

Non-game downloads also climbed 1.8 percent year-over-year, though the growth varied significantly between categories. Utilities and Finance had strong growth, while Photo & Video app installs declined 12 percent.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Jan. 1 through Mar. 31, 2022. Apple apps are excluded. We report unique installs only (one download per User).

Google Play



Top Categories by Worldwide Downloads

Game categories on Google Play reached 12 billion downloads for only the second time, ranking behind the 12.4 billion seen in Q2 2020. Year-over-year growth was similar to that seen on the App Store at around 2 percent.

Finance was one of the fastest growing categories on Google Play with 21 percent year-over-year growth. It passed Social to rank as the fourth largest category on the platform.

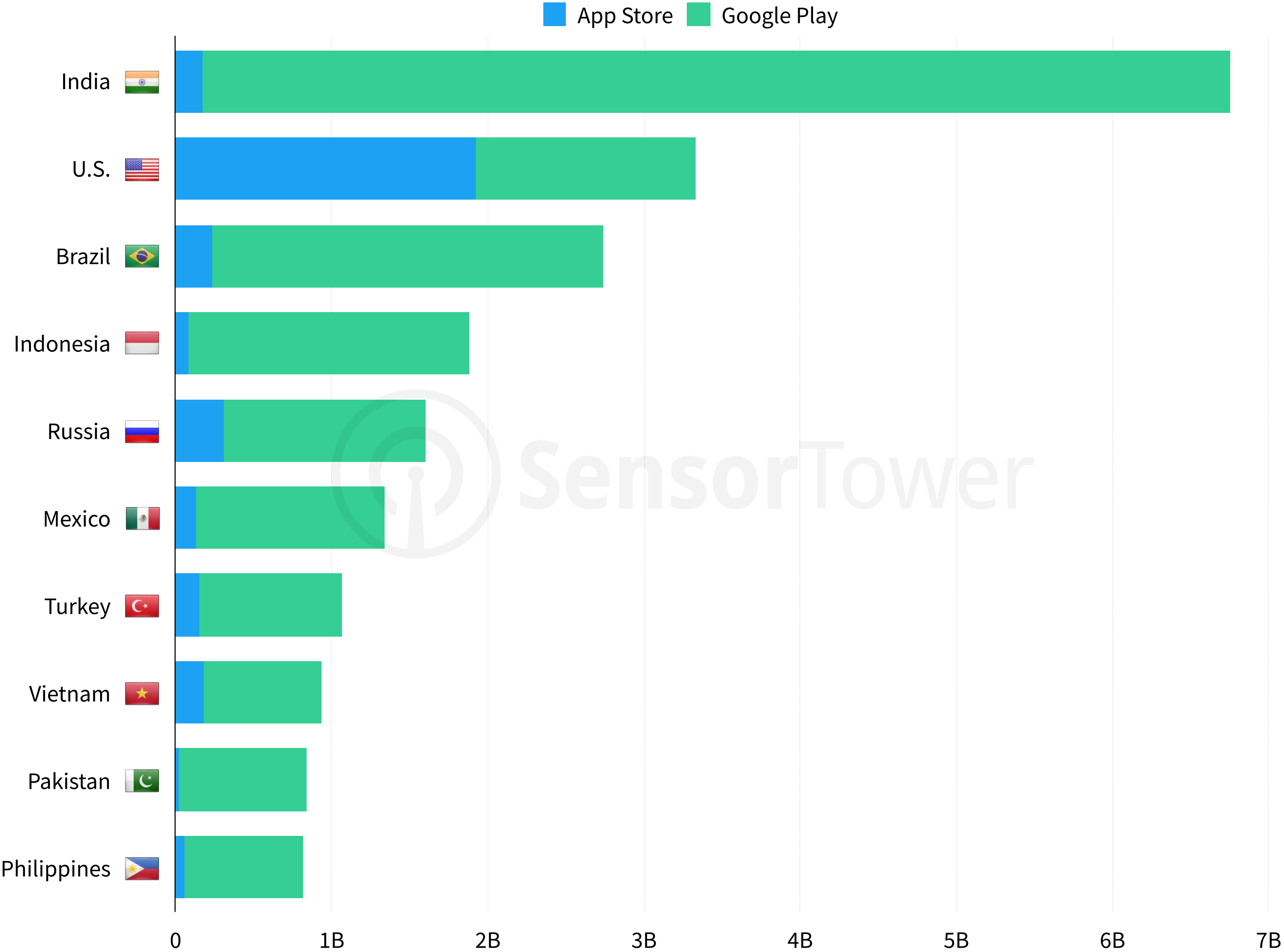
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Top Countries

Top Countries by Downloads in Q1 2022



Overall



Top Countries by Downloads

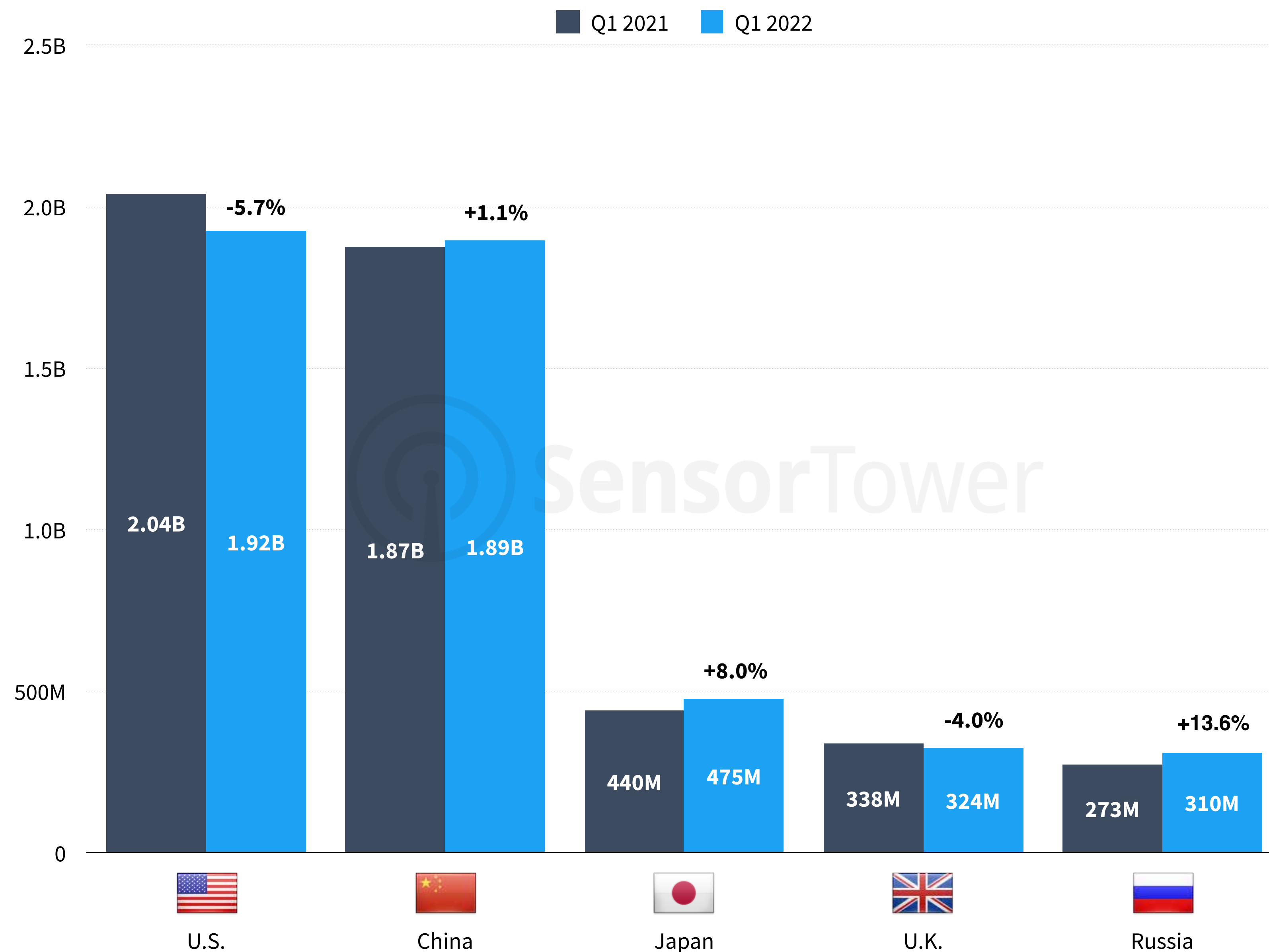
The top five countries remained the same as in Q4 2021. Each country saw modest growth quarter-over-quarter.

Vietnam had the highest year-over-year growth among the top 10 countries at 24 percent, with installs climbing from 753 million in Q1 2021 to 937 million in Q1 2022. Pakistan also saw strong Y/Y growth at 22 percent for the quarter.

Note Regarding Download Estimates
Our estimates include worldwide daily download totals for iPhone and iPad for Jan. 1 through Mar. 31, 2022. Apple apps are excluded. We report unique installs only (one download per User).

As Google Play is not available in China, we have excluded the country from this chart.

App Store



Top Countries by Downloads

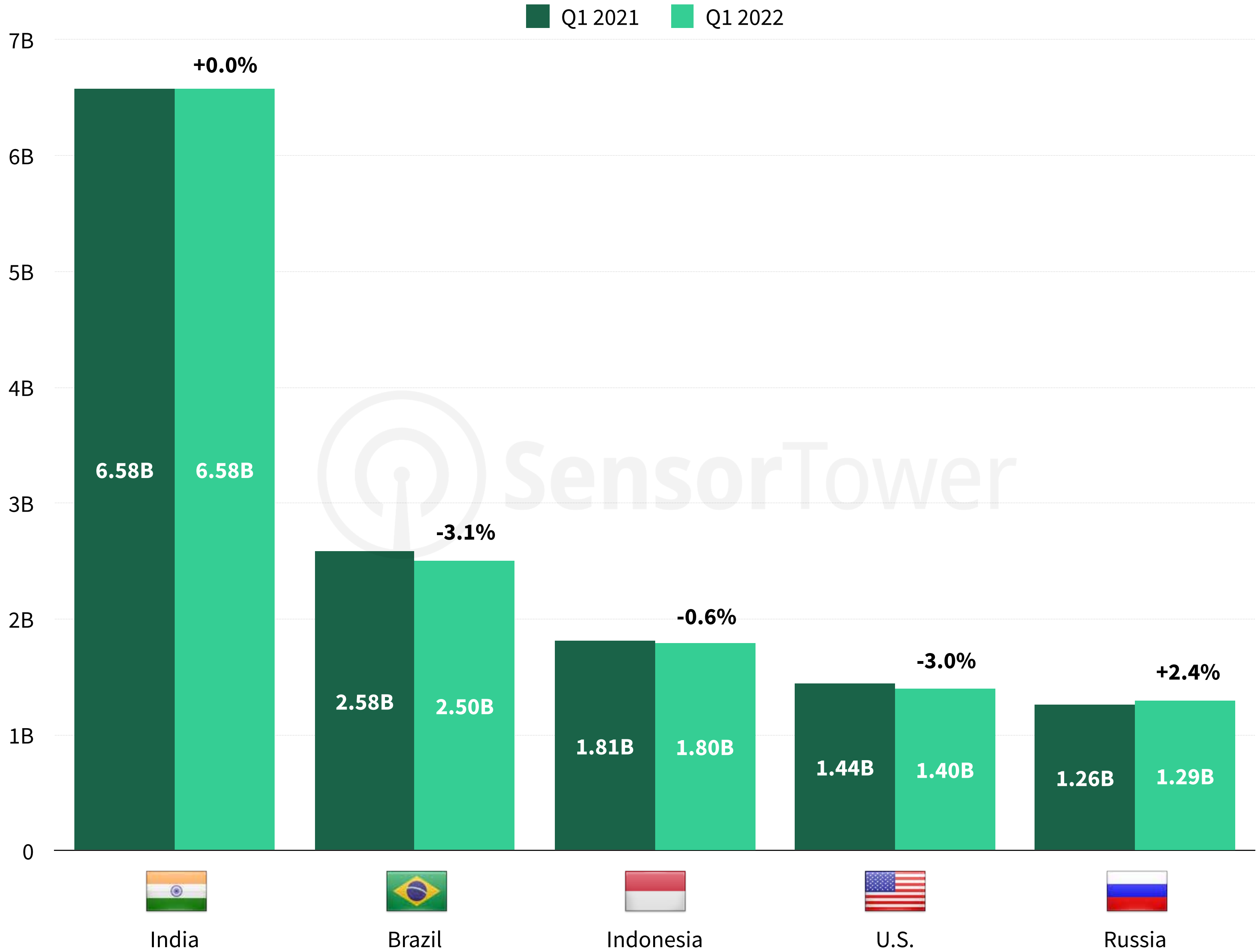
The U.S. and China each had approximately 1.9 billion downloads on the App Store in Q1 2022, well ahead of the third largest country, Japan. Over the past four quarters each market totaled 7.5 billion downloads.

Japan had a strong quarter with its second best download total ever (only behind the elevated total in Q2 2020 at the start of the COVID-19 pandemic). Meanwhile, Russia surpassed 300 million downloads in a quarter for the first time.

Note Regarding Download Estimates

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Google Play



Top Countries by Downloads

Download growth in top Google Play markets has flattened out following the large boost seen at the start of the COVID-19 pandemic. Installs in India, Brazil, and Indonesia were still well above pre-pandemic levels in 2019.

While U.S. downloads were down slightly year-over-year, the 1.4 billion in Q1 2022 was up 4 percent quarter-over-quarter. It was also higher than the 1.34 billion from Q1 2019 before the start of the pandemic.

Note Regarding Download Estimates

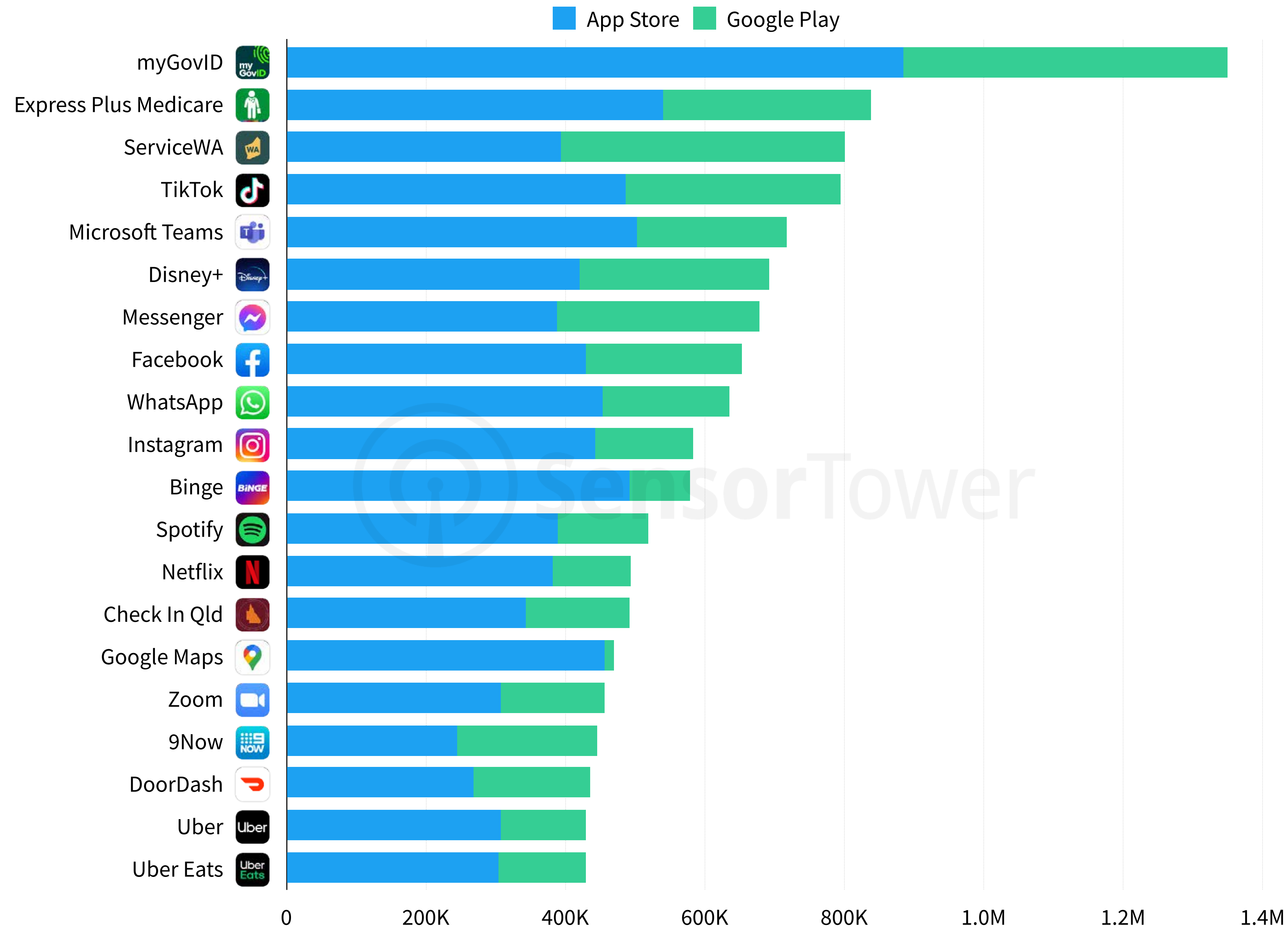
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A dark, blurred map of Australia is the background. A red pushpin is stuck into the eastern coast, near Sydney. The map shows state and territory names like Queensland, New South Wales, Victoria, and South Australia, along with various city names such as Brisbane, Sydney, Melbourne, and Canberra. The word 'AUSTRALIA' is prominently displayed in the center.

Spotlight on Australia

The Latest Mobile Trends in Australia

Overall - Australia



Top Apps by Australian Downloads

Government apps that offer identity and vaccination verification functionality have become fixtures on Australia’s app stores amid the ongoing pandemic. **The most prominent, myGovID, was No. 1 overall last quarter, with another, Express Plus Medicare, at No. 2.**

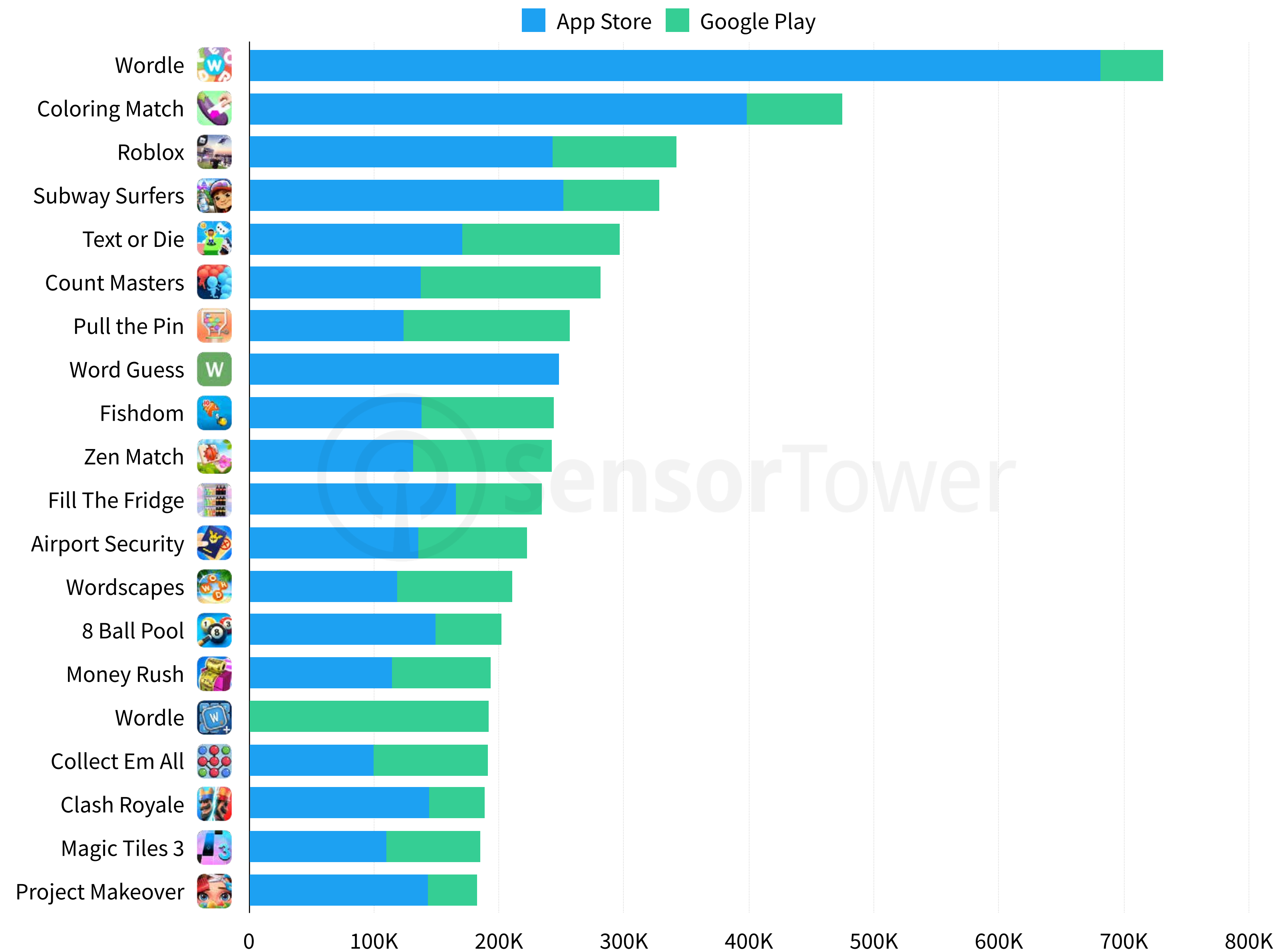
Entertainment and Social Networking apps such as Disney+ and Facebook have seen their standings dip year-over-year along with their downloads as the COVID-fueled adoption wave buoying them gradually subsides.

TikTok bucked that trend, climbing from No. 7 in Q1 2021 to No. 4 overall last quarter.

Note Regarding Download Estimates

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Overall - Australia



Top Games by Australian Downloads

As in other markets, **word games saw a surge in interest among Australian consumers during Q1**, driven by the popularity of the web-game Wordle. **The prime beneficiary of this was the eponymous yet in no way connected Wordle, which rode its mistaken identity all the way to No. 1 across both stores.**

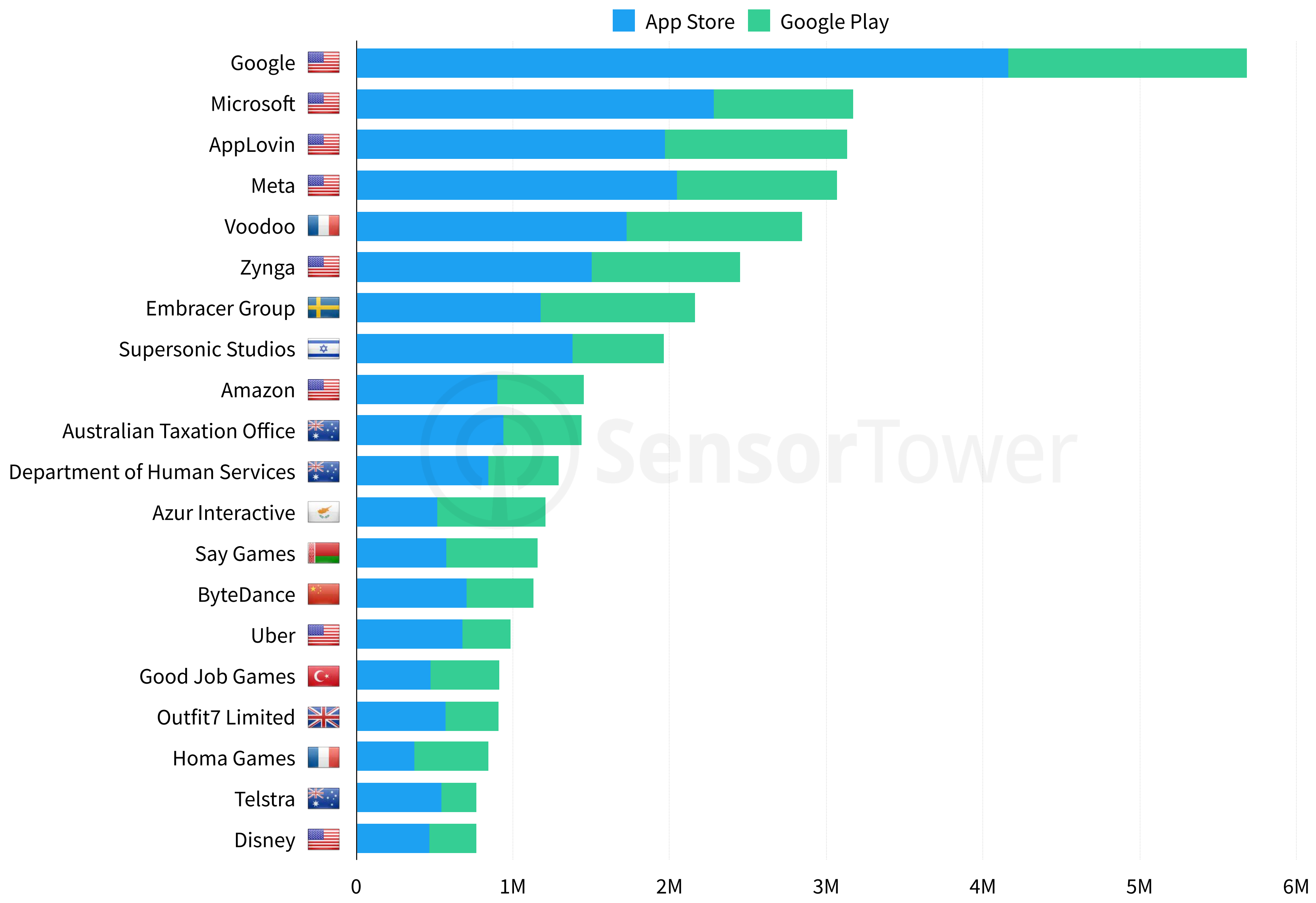
Roblox remained an extremely popular download, raising its position to No. 3 in terms of first-time mobile game downloads overall. **It had been No. 5 one year prior.**

Prominent titles in Q1 2021, Among Us and Project Makeover dropped out of the top 20 and to No. 20, respectively. The latter was the No. 1 game a year ago while the former was No. 2.

Note Regarding Download Estimates

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Overall - Australia



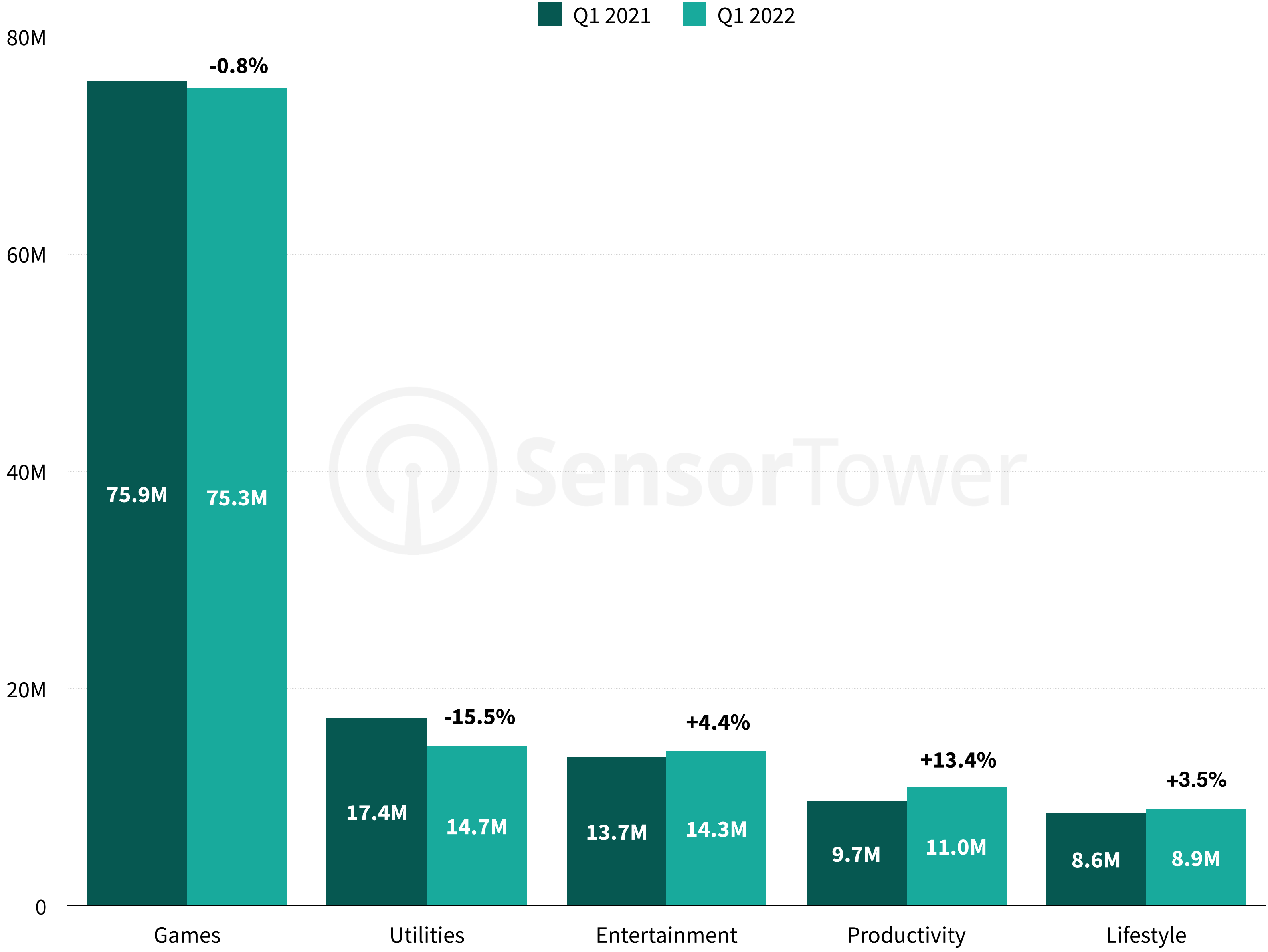
Top Publishers by Australian Downloads

Meta might have been the No. 1 app publisher globally, but it was No. 4 in Australia last quarter. Google ruled the roost in this APAC market with Microsoft a distant No. 2 and AppLovin close behind.

Many of the most successful publishers in Australia are based in the U.S., including four of the top five publishers in Q1 2022. Three Australian publishers also made the top 20, although it's worth noting that two of them were government agencies.

Note Regarding Download Estimates
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Overall - Australia



Top Categories by Australian Downloads

App installs remained fairly level for both games and non-games in Australia over the past year. Each saw a decline of less than 1 percent year-over-year in Q1 2022.

Productivity apps were buoyed by government apps including myGovID and ServiceWA, resulting in 13.4 percent growth year-over-year. Meanwhile, top contributors to Entertainment category growth included video streaming apps Binge and Paramount+.

Note Regarding Download Estimates
 Our estimates include worldwide daily download totals for iPhone and iPad for Jan. 1 through Mar. 31, 2022. Apple apps are excluded. We report unique installs only (one download per User).



Stories of the Quarter

—
Key Trends in Mobile

Stories of the Quarter: Introduction



1. Interest in Gas Apps Spiked Amid Inflation

High inflation in the U.S. and across Europe has driven demand for gas apps to help cost-conscious consumers.



2. The Wordle Frenzy Made its Way to Mobile

Mobile games were quick to add the six-guess gameplay from the viral web-based game and several games saw huge growth.



3. U.S. Video Streaming Continues to Grow

Top U.S. video streaming apps added new content in Q1 2021 as the market has become increasingly competitive.

Could your business benefit from access to Store Intelligence insights and the highly accurate data used to build this report?

See the fastest growing apps and publishers by downloads or revenue.

REQUEST DEMO 

Stories of the Quarter:

1. Demand for Gas Apps Surged

As inflation and high gas prices hit the U.S. and European markets, consumers became increasingly cost-conscious and large numbers turned to gas price tracking and reward apps to save money.

- **GasBuddy had the second highest download growth among Travel apps in the U.S. last quarter, with installs climbing 1.4 million vs. Q4 2021.** Only Vrbo had higher growth.
- **Demand for gas price and reward apps spiked along with the average gas price in the U.S.** Apps for gas stations also saw growth, although at a much smaller scale.
- **Demand for gas-related apps was not limited to the U.S.** Apps in the U.K., Germany, and France also experienced rapid growth.



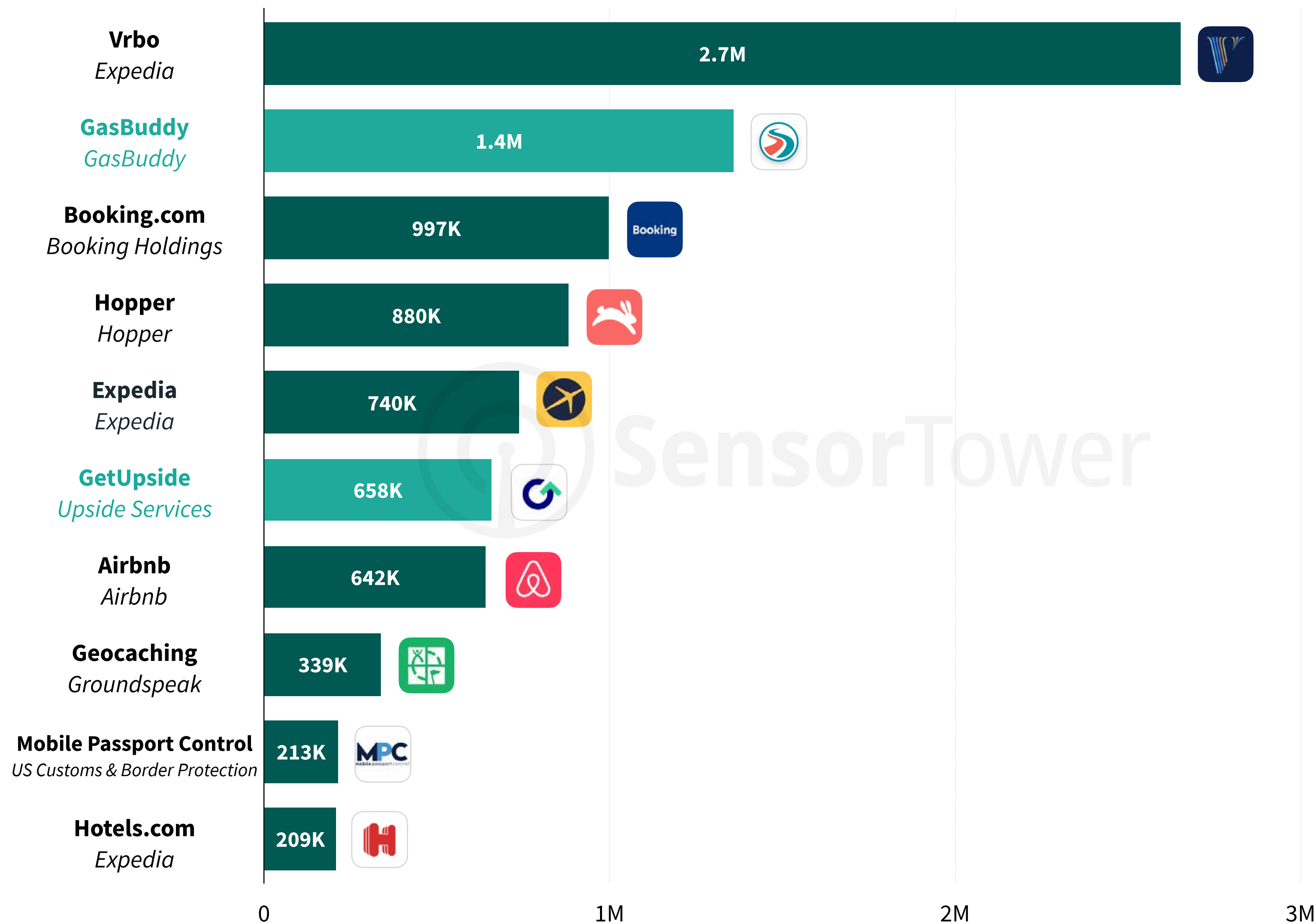
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See the fastest growing apps and publishers by downloads or revenue.

REQUEST DEMO 

Consumer Interest in Gas Prices Spiked Amid High Inflation

Top Travel & Navigation apps by Q/Q download growth in the U.S. for Q1 2022



U.S. Download Growth

High inflation created increased demand for apps that help reduce gas prices. GasBuddy has a fuel card that enables consumers to save up to 25 cents per gallon, while GetUpside advertises cash back on gas, as well as groceries and at restaurants.

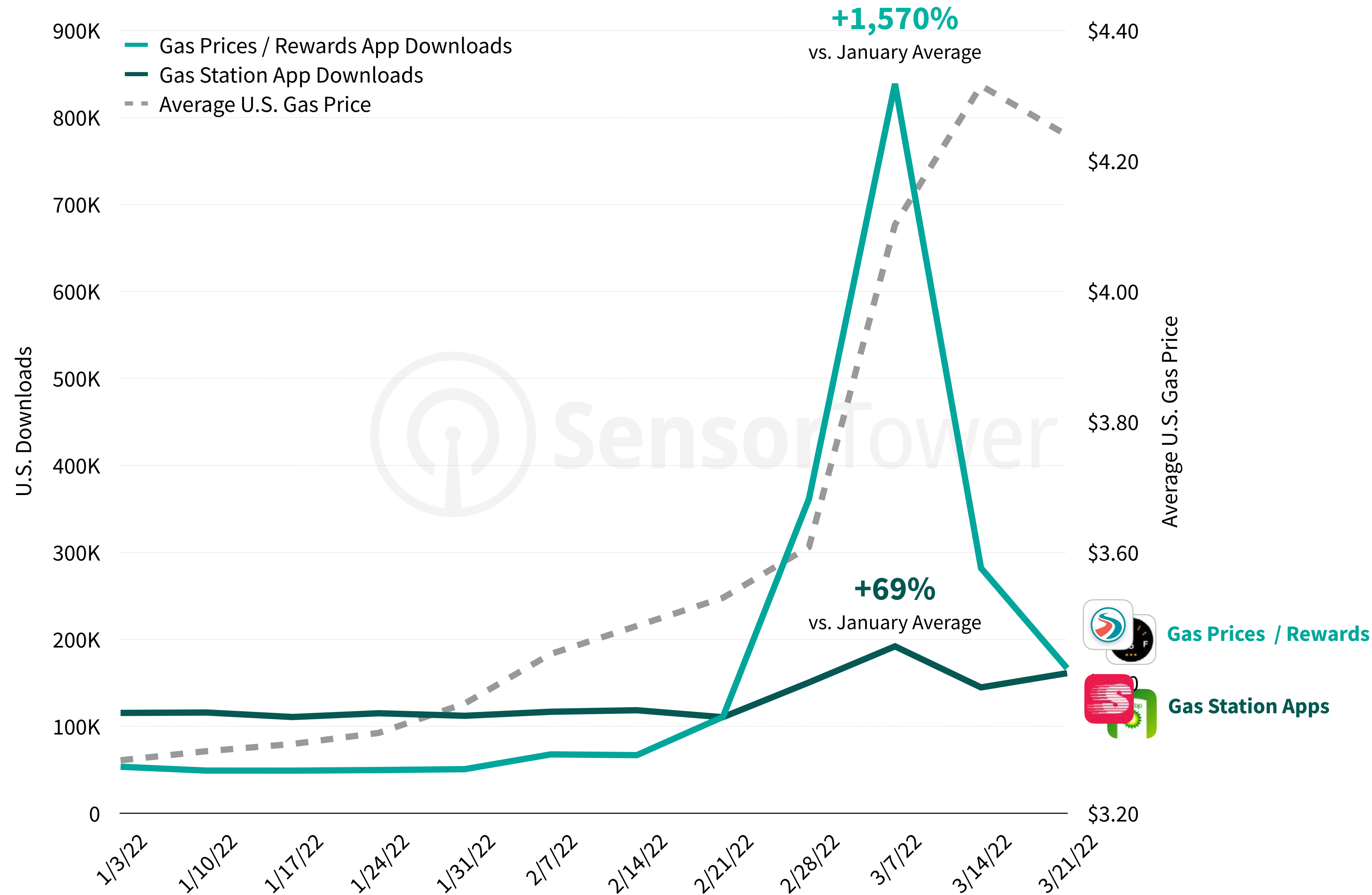
GasBuddy ranked second to Vrbo by quarter-over-quarter download growth in Q1 2022 among top Travel apps. This was particularly impressive given the continued rapid growth from many top apps as travel bounced back from COVID-19.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Oct. 1, 2021 through Mar. 31, 2022. Apple apps and Google pre-installed apps are excluded. We report unique installs only. Android estimates do not include third-party stores. Top apps are determined by raw growth, not percent growth.

Gas Price & Reward App Installs Tracked U.S. Gas Prices

U.S. downloads for the top gas apps



U.S. Downloads

Demand for GasBuddy, Gas Guru, and Gas Prices Near You skyrocketed starting in late February as gas prices were on the rise. These apps combined for nearly 840 thousand installs during the week of March 7, 2022.

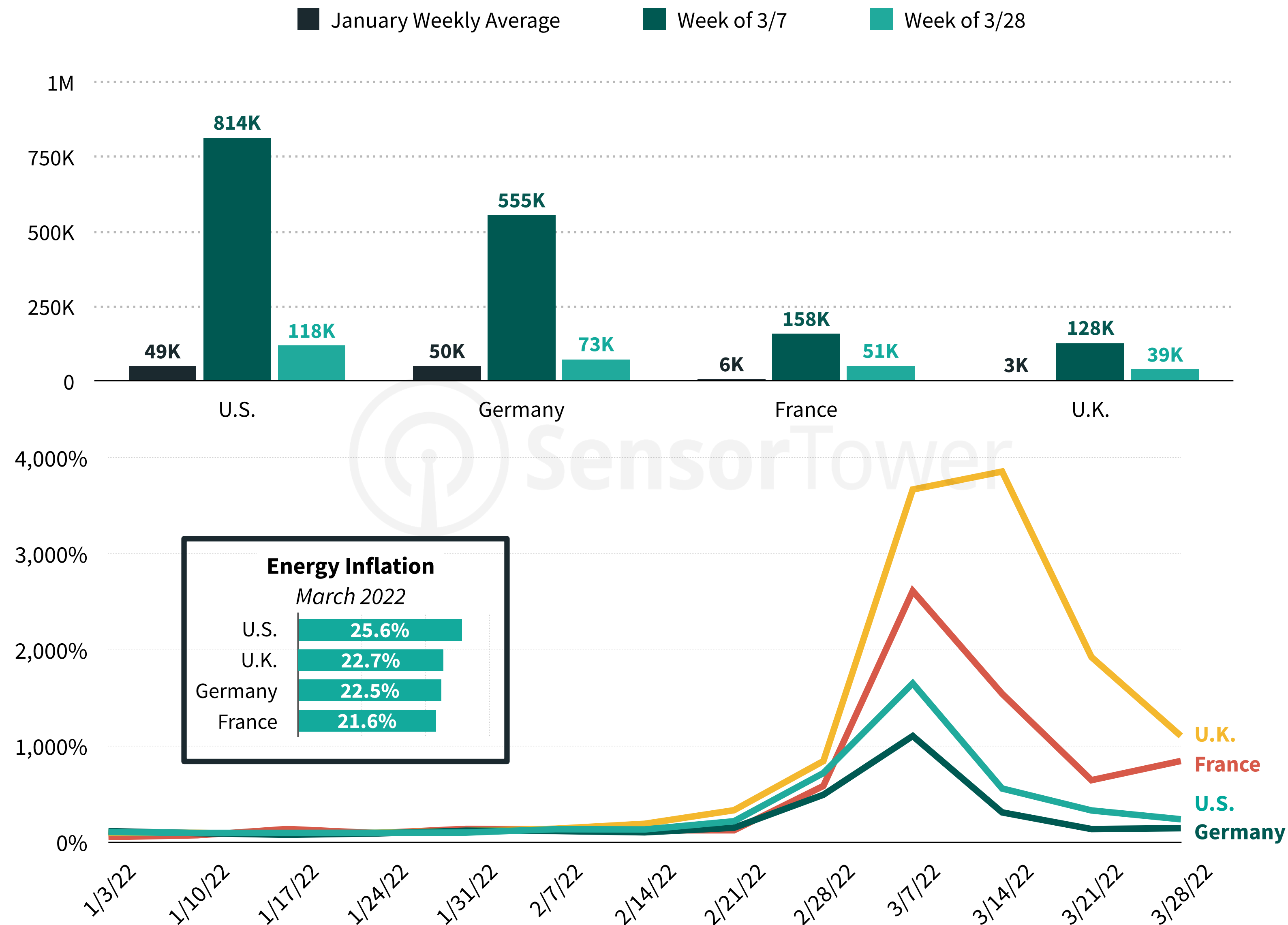
Many gas stations like Exxon Mobil and Speedway provide the opportunity to earn rewards through their apps. Downloads for top apps were up nearly 70 percent in early March compared to January.

Note

Sample includes the top three apps for gas prices / rewards (GasBuddy, Gas Guru, and Gas Prices Near You) and the top seven gas station apps (Speedway, BPme, Exxon Mobil Rewards, Shell, ValeroPay+, Chevron, and Sunoco). Average gas price data is from the [U.S. Energy Information Administration](https://www.eia.gov)

Demand for Gas Apps was Also High in Europe

Weekly download and download growth for top gas apps in select markets



Weekly Downloads

Installs for top gas apps across some of the largest European markets also surged, including clever-tanker.de in Germany, Essence / Gasoil Now in France, and PetrolPrices.com in the U.K.

The U.S. and Germany saw the highest increases in terms of raw download growth in early March. The U.K. and France had the highest growth rate among the four countries though it was at a smaller overall scale.

Note

Download growth is calculated vs. the weekly average from January in each country. Data includes top gas-related apps in each market (GasBuddy and Gas Guru in the U.S., clever-tanken.de, mehr-tanken, TankenApp mit Benzinpreistrend, 1-2-3 Tanken in Germany, PetrolPrices.com in the U.K., and Essence / Gasoil Now in France). Inflation data is annual growth rate for March 2022 from [OECD](https://www.oecd.org/).

Stories of the Quarter:

2. Wordle's Impact on Mobile

The popularity of the viral web-based game made its way to mobile in Q1 2022.

- **Wordle, a mobile word game released in 2016, was unrelated to the web-based game that became popular in 2022.** However, it made the most of this coincidence, adding the six guess gameplay and becoming the top game by U.S. downloads in Q1 2022.
- **Some other Word games launched last quarter with the Wordle-style gameplay, including Wordus and Word Guess.** U.S. Word game installs climbed 74 percent quarter-over-quarter.
- **A few top game developers invested in the Wordle market.** Lion Studios acquired Wordle (the mobile game version) and Rovio acquired Wordus in an attempt to access the Wordle user base.



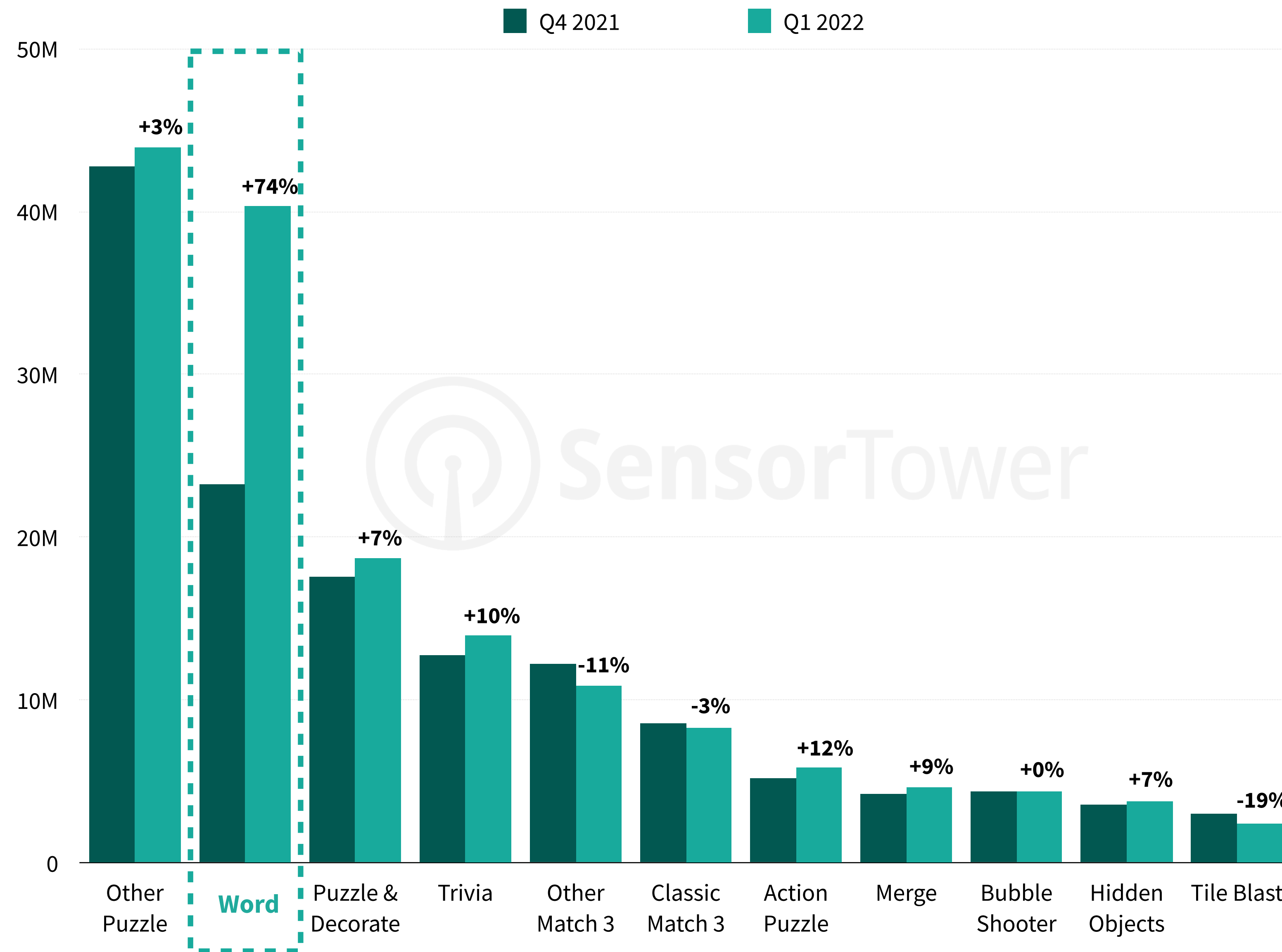
Could your business benefit from access to Store Intelligence insights and the highly accurate data used to build this report?

See the fastest growing apps and publishers by downloads or revenue.

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A Wordle Frenzy Boosted Word Game Adoption by 74 Percent

U.S. downloads by Puzzle game sub-genre



U.S. Downloads

U.S. Puzzle game installs climbed 14 percent quarter-over-quarter in Q1 2022. **Nearly all of this growth was from the Word sub-genre. Excluding Word games, Puzzle game download growth was only 2 percent.**

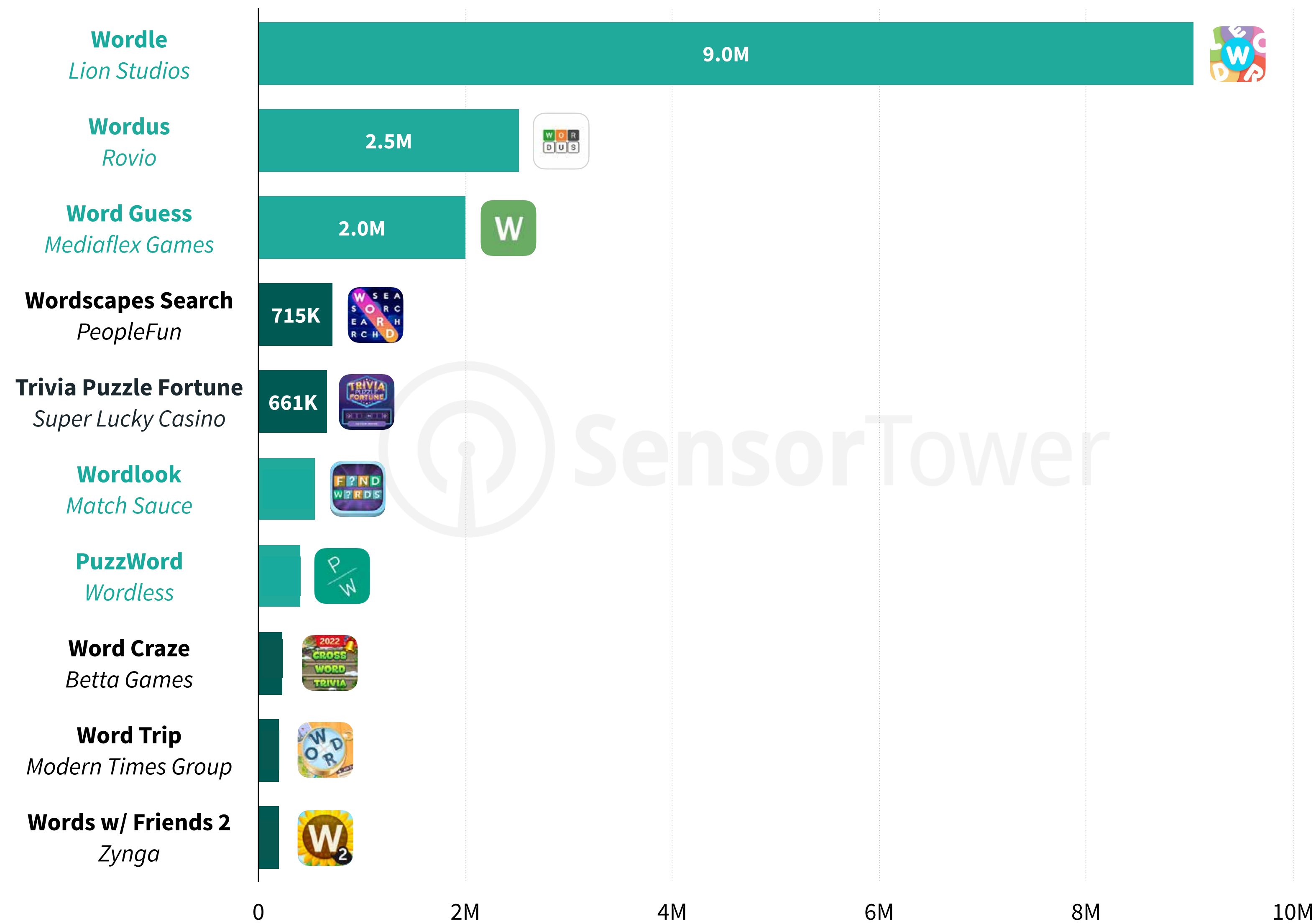
Wordle from Lion Studios was the top game by U.S. downloads last quarter with 9 million downloads. Other games with Wordle-style gameplay included Wordus with 2.5 million downloads and Word Guess at 2 million.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Oct. 1, 2021 through Mar. 31, 2022. Apple apps and Google pre-installed apps are excluded. We report unique installs only. Android estimates do not include third-party stores.

Fastest Growing Word Games Included Wordle Gameplay

Top Word games by U.S. Q/Q download growth in Q1 2022



U.S. Download Growth

Five of the top 10 Word games by Q/Q download growth included Wordle-style gameplay, with Wordle, Wordus, and Word Guess leading the way. These games all either released during the quarter or added the gameplay as the web-based Wordle game's popularity took off.

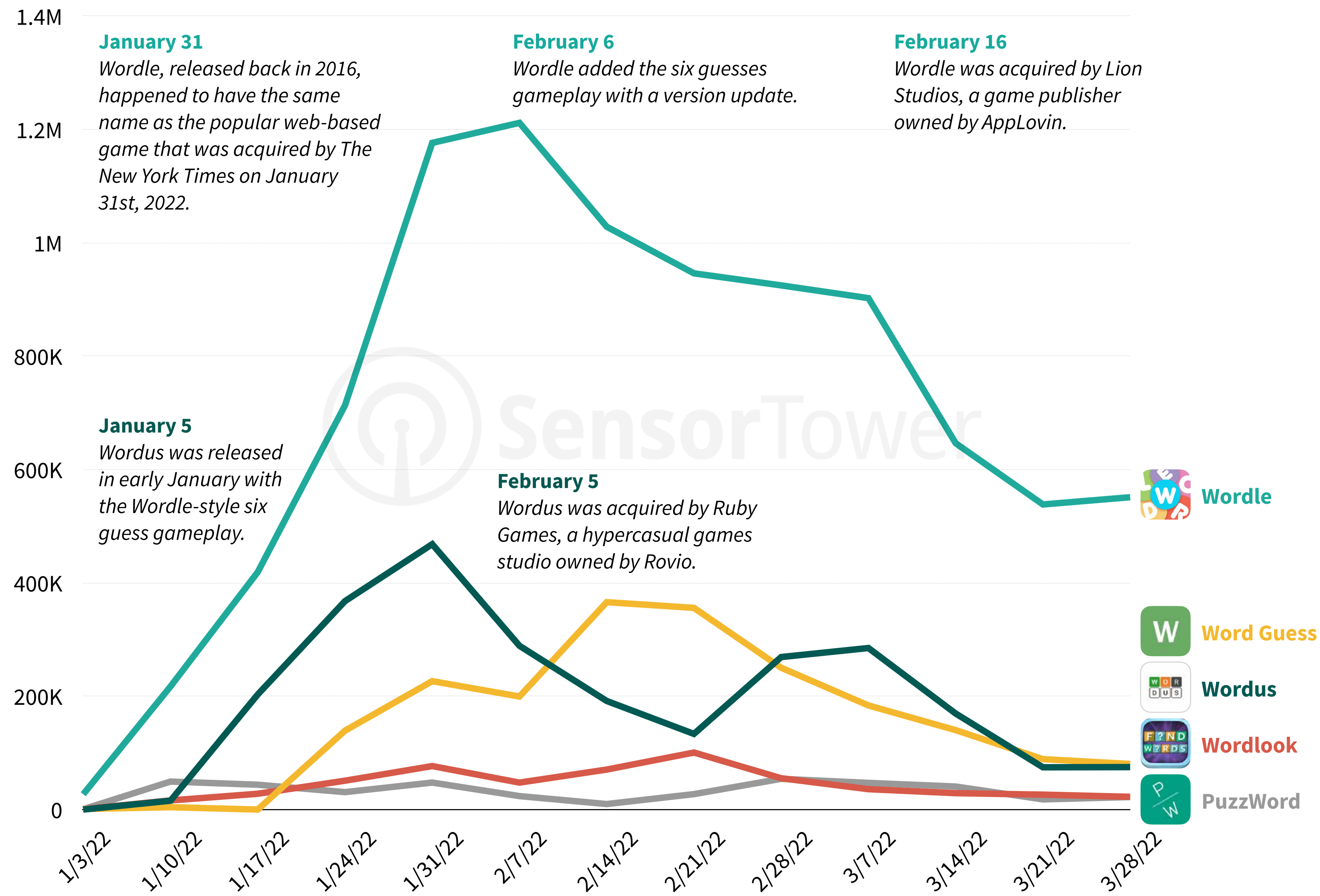
The top five games with Wordle-style gameplay combined for 14.5 million more installs in Q1 2022 than the previous quarter. These games alone accounted for 74 percent of total Puzzle game download growth in 1Q22.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Oct. 1, 2021 through Mar. 31, 2022. Apple apps and Google pre-installed apps are excluded. We report unique installs only. Android estimates do not include third-party stores.

Wordle Caught the Attention of Big Game Developers

Weekly U.S. downloads for top games with Wordle-style gameplay



Weekly U.S. Downloads

Wordle, a word game released in 2016, was unrelated to the web-based viral sensation that became popular in 2022. However, the mobile game was able to capitalize on this coincidence, adding the six guess gameplay in early February.

Other games were launched in early 2022 with the Wordle six guess gameplay. A few were popular enough to attract the attention of established game publishers, with AppLovin’s Lion Studios acquiring Wordle and Rovio’s Ruby Games acquiring Wordus.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1, 2019 through Dec. 31, 2021. Apple apps and Google pre-installed apps are excluded. We report unique installs only. Android estimates do not include third-party stores.

Stories of the Quarter:

3. U.S. Video Streaming Continues to Grow

The release of new streaming platforms and the race to add more content has made the space more competitive ever in Q1 2022.

- **Video streaming app downloads, consumer spending, and usage have all continued to rise in recent years.** Consumers clearly see value in the option of watching this type of content while on the go.
- **The video streaming market was more competitive than ever in Q1 2022.** Six different apps had more than 10 percent of the download market among top apps, and four apps had more than 10 percent of the monthly active users.
- **Several big events in Q1 2022 helped boost adoption and give certain apps an edge in this competitive space.** HBO Max's season two of Euphoria was incredibly popular, and Peacock TV and Paramount+ benefitted from major U.S. sporting events.



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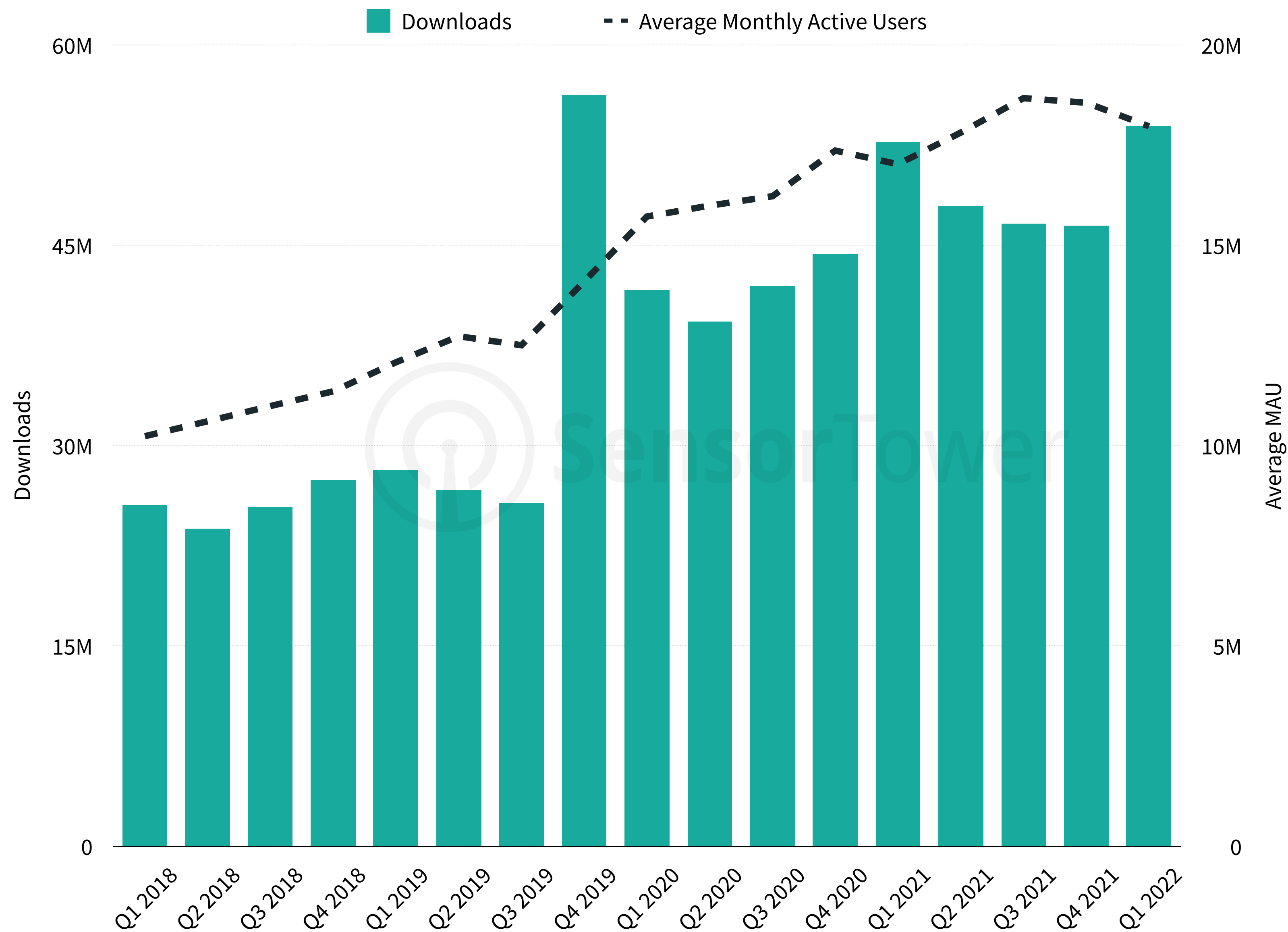
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U.S. Streaming Video Usage Continues to Grow

U.S. downloads and active users for top video streaming apps



U.S. Downloads and Active Users

The U.S. video streaming space continues to grow, with both downloads and active users trending upwards in recent years. The launch of Disney+ in late 2019 accelerated this trend, followed by the release of Peacock TV in 2020 and Discovery+ in 2021.

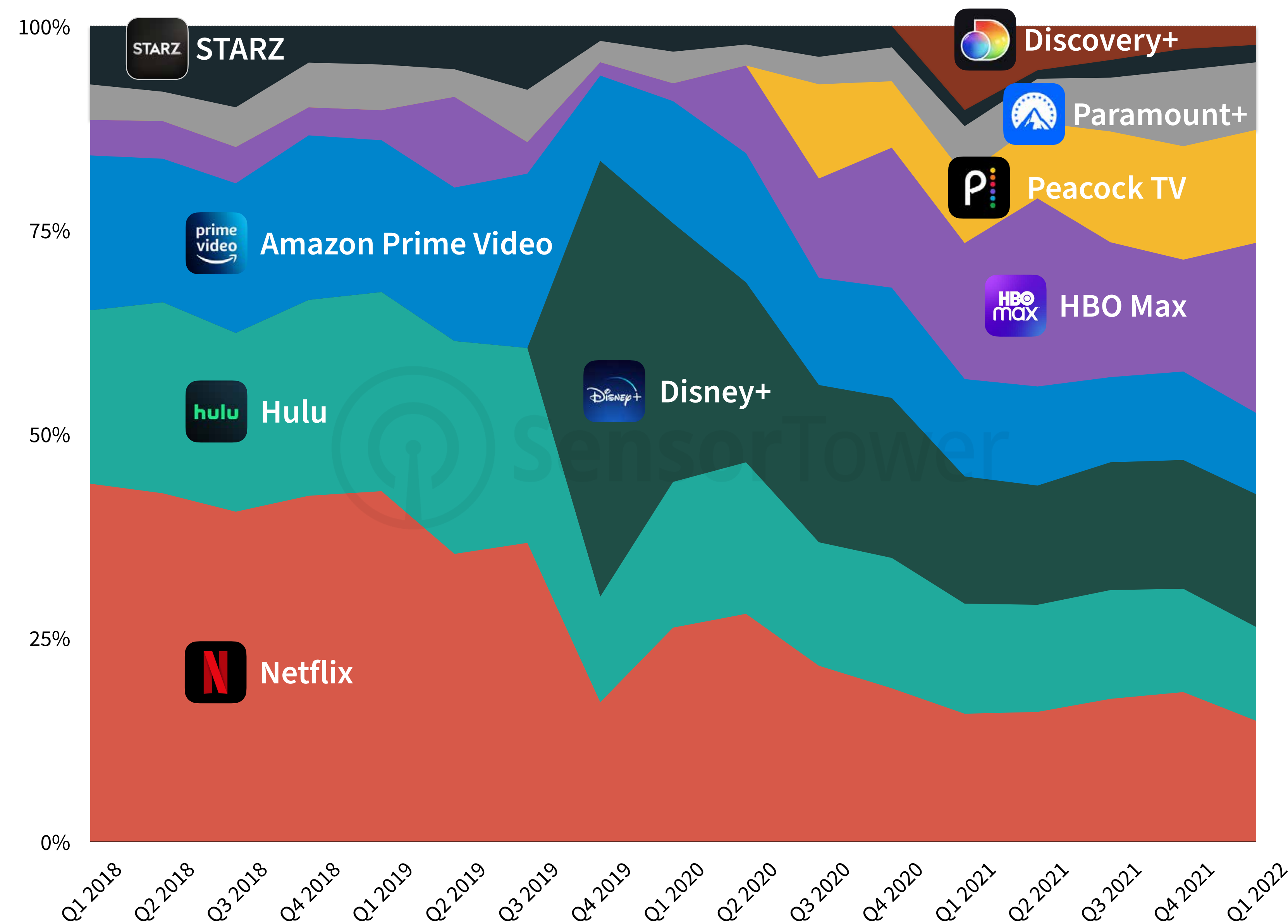
Top apps averaged nearly 18 million monthly active users in Q1 2022, up 76 percent from Q1 2018 (though three of the top apps had yet to launch in 2018). Netflix, Hulu, and Disney+ led the way by MAU.

Note

Monthly active users totals are the average of each app’s average MAU each quarter (this may count users multiple times if they use multiple streaming services). Apps include Netflix, Hulu, Disney+, Amazon Prime Video, HBO Max, Peacock TV, Paramount+, STARZ, and Discovery+

Video Streaming is More Competitive Than Ever

U.S. download market share among the top streaming video apps



U.S. Download Market Share

From Q1 2018 through Q3 2019, the top three video streaming apps combined for more than 80 percent of the downloads among top apps in the U.S. By Q1 2022, Netflix, Hulu, and Amazon Prime Video combined for only 37 percent of downloads.

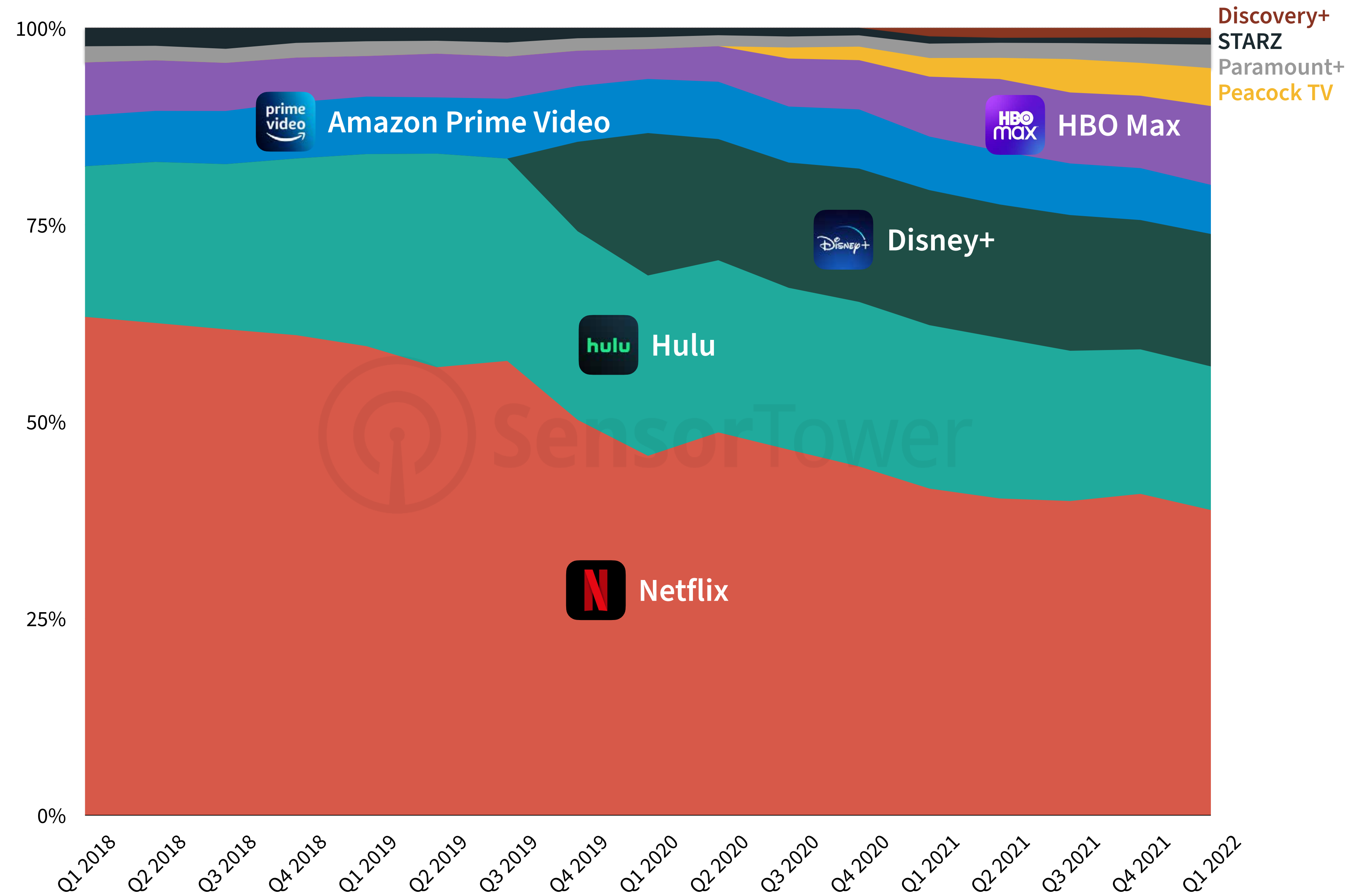
Six different apps had more than 10 percent market share among top apps in Q1 2022, led by HBO Max (21 percent), Disney+ (17 percent), and Netflix (15 percent). Peacock TV, Hulu, and Amazon Prime Video also had at least 10 percent.

Note

Market share is among top apps including Netflix, Hulu, Disney+, Amazon Prime Video, HBO Max, Peacock TV, Paramount+, STARZ, and Discovery+

New Streaming Apps Have Gained Market Share

U.S. monthly active user market share among the top streaming video apps



U.S. MAU Market Share

The launch of new apps has cut into the market share for established top video platforms like Netflix, Hulu, and Amazon Prime Video. **No app had a faster rise than Disney+, which ranked third by U.S. MAU by Q1 2022.**

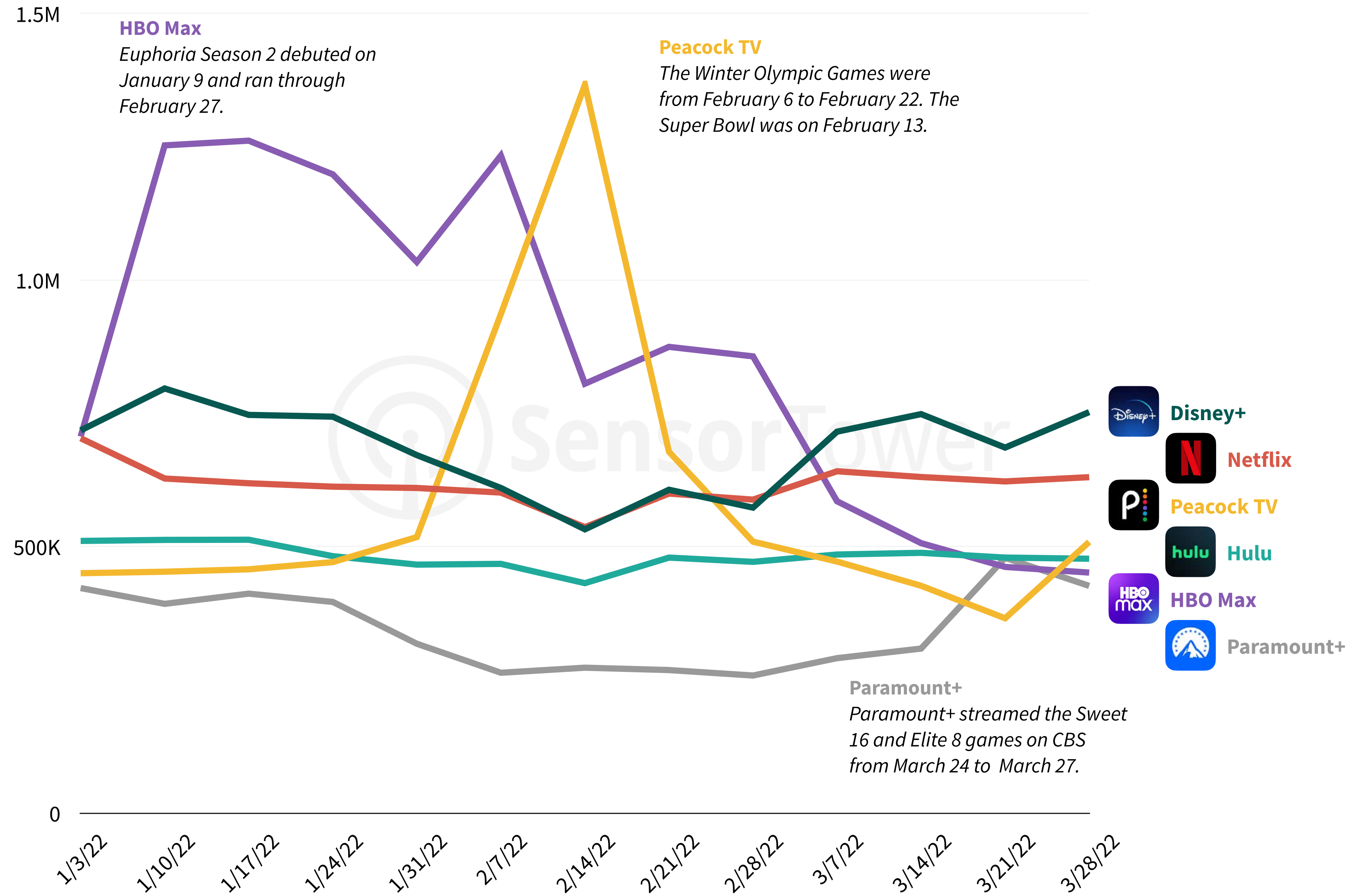
HBO launched HBO Max in May 2020, replacing HBO Go and HBO Now. The platform has had success adding new users since with its U.S. market share climbing from 4.5 percent in Q2 2020 to 10 percent in Q1 2022.

Note

Market share is among top apps including Netflix, Hulu, Disney+, Amazon Prime Video, HBO Max, Peacock TV, Paramount+, STARZ, and Discovery+

New Releases and Events are Still Critical for Streaming Apps

Weekly U.S. downloads for top streaming apps



U.S. Downloads

In Q1 2022, downloads for top apps continued to be driven by the most popular shows and sports events. HBO Max received a huge boost with its release of Euphoria Season 2.

Meanwhile, major sports games also helped boost adoption. Peacock TV received a spike in installs during the Super Bowl, while CBS was able to promote its Paramount+ app using its coverage of select March Madness games.

Note Regarding Download Estimates

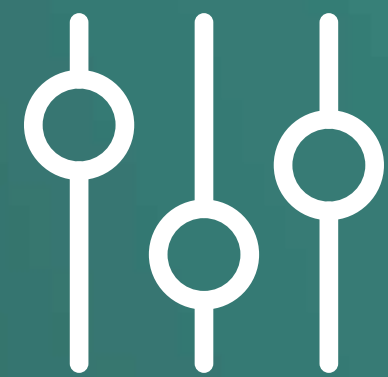
Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 3, 2022 through Apr. 2, 2022. Apple apps and Google pre-installed apps are excluded. We report unique installs only. Android estimates do not include third-party stores.

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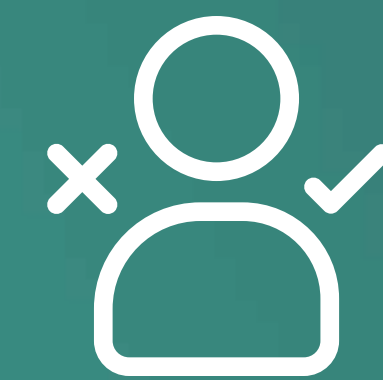
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