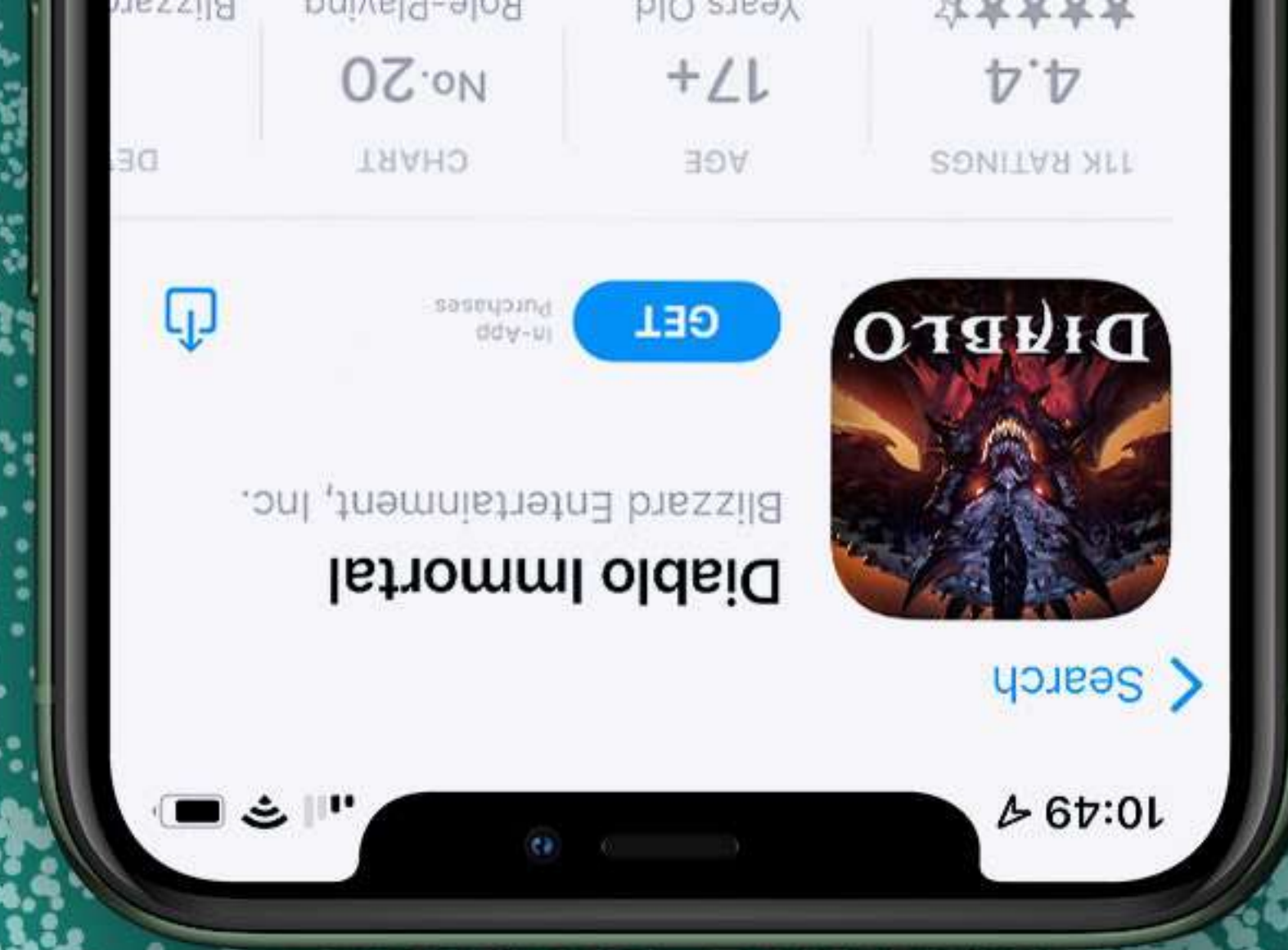




Q2 2022: Store Intelligence Data Digest

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



Executive Summary: Highlights



Worldwide app downloads totaled 35 billion in 1Q22, a 2.5 percent year-over-year decrease.

App Store downloads fell 1.3 percent to 7.8 billion, while Google Play installs declined nearly 3 percent to 27.2 billion.



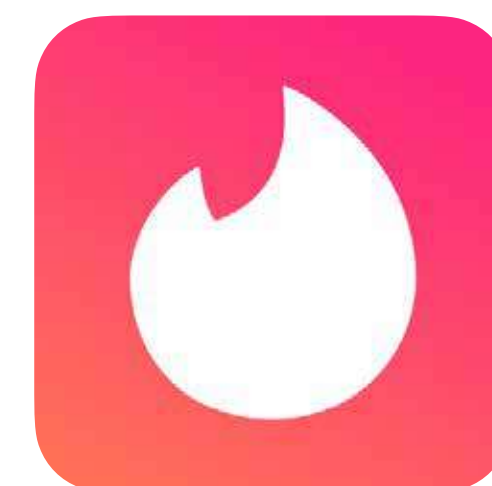
Subway Surfers was the top mobile game by downloads globally, as well as in the U.S. and Europe.

The game reached record highs in both adoption and consumer spending before being acquired by Miniclip this quarter.



TikTok was once again the top app by worldwide downloads in Q2 2022.

Meta-owned Instagram, Facebook, and WhatsApp took the next three spots, while Snapchat rounded out the top five most-installed apps.



The mobile market has shifted in the United States, with consumer spending moving away from games and towards apps.

Consumers spent more in non-games than games on the U.S. App Store for the first time in Q2 2022.

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 April 1, 2022 through June 30, 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.

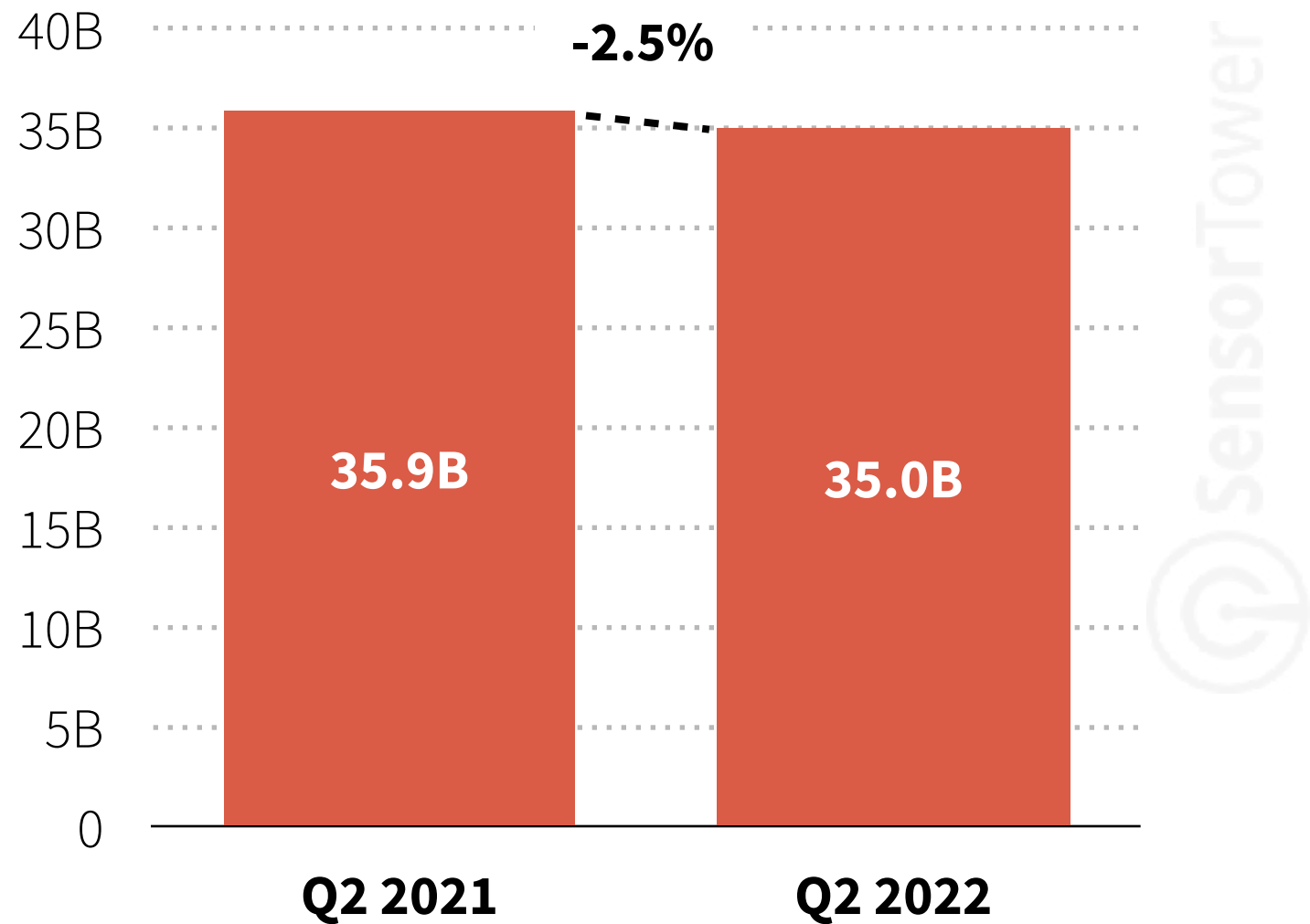
Could your business benefit from access to Store Intelligence insights and the highly accurate data used to build this report?

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

REQUEST DEMO 

Market Overview: Q2 2022 Worldwide Download Growth

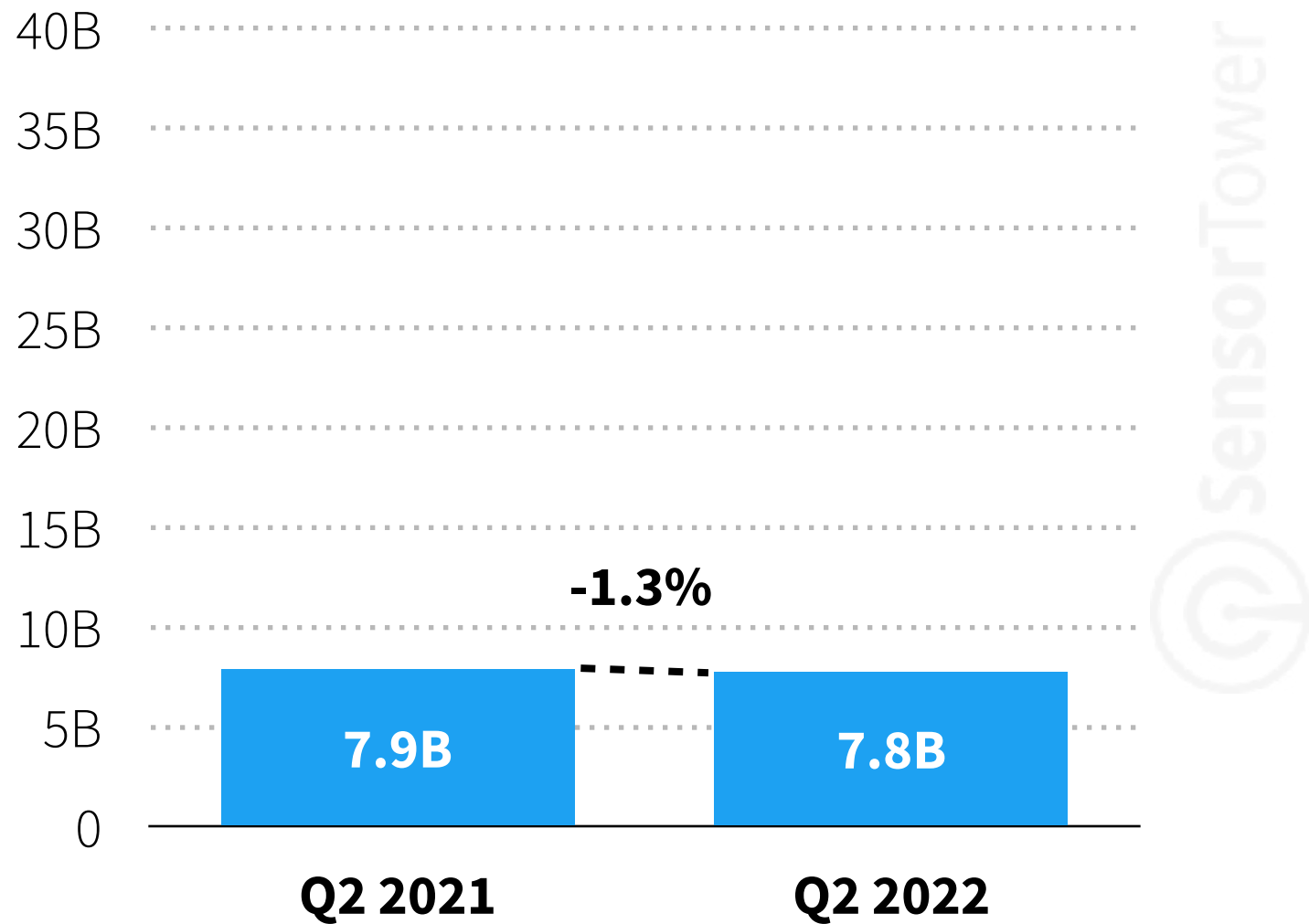
Worldwide App Store and Google Play Downloads



35.0 Billion

App Store + Google Play Downloads

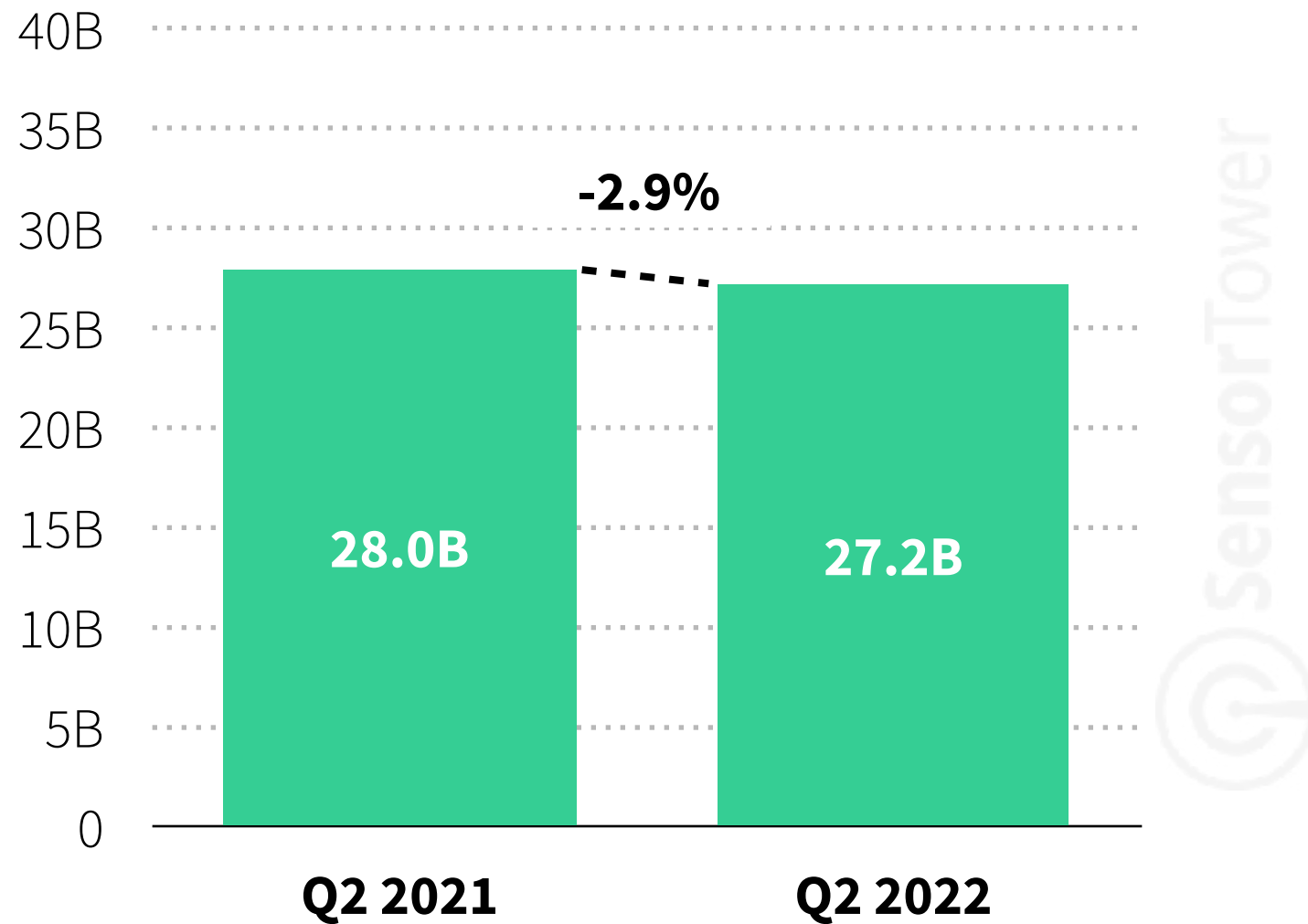
Worldwide App Store Downloads



7.8 Billion

App Store Downloads

Worldwide Google Play Downloads



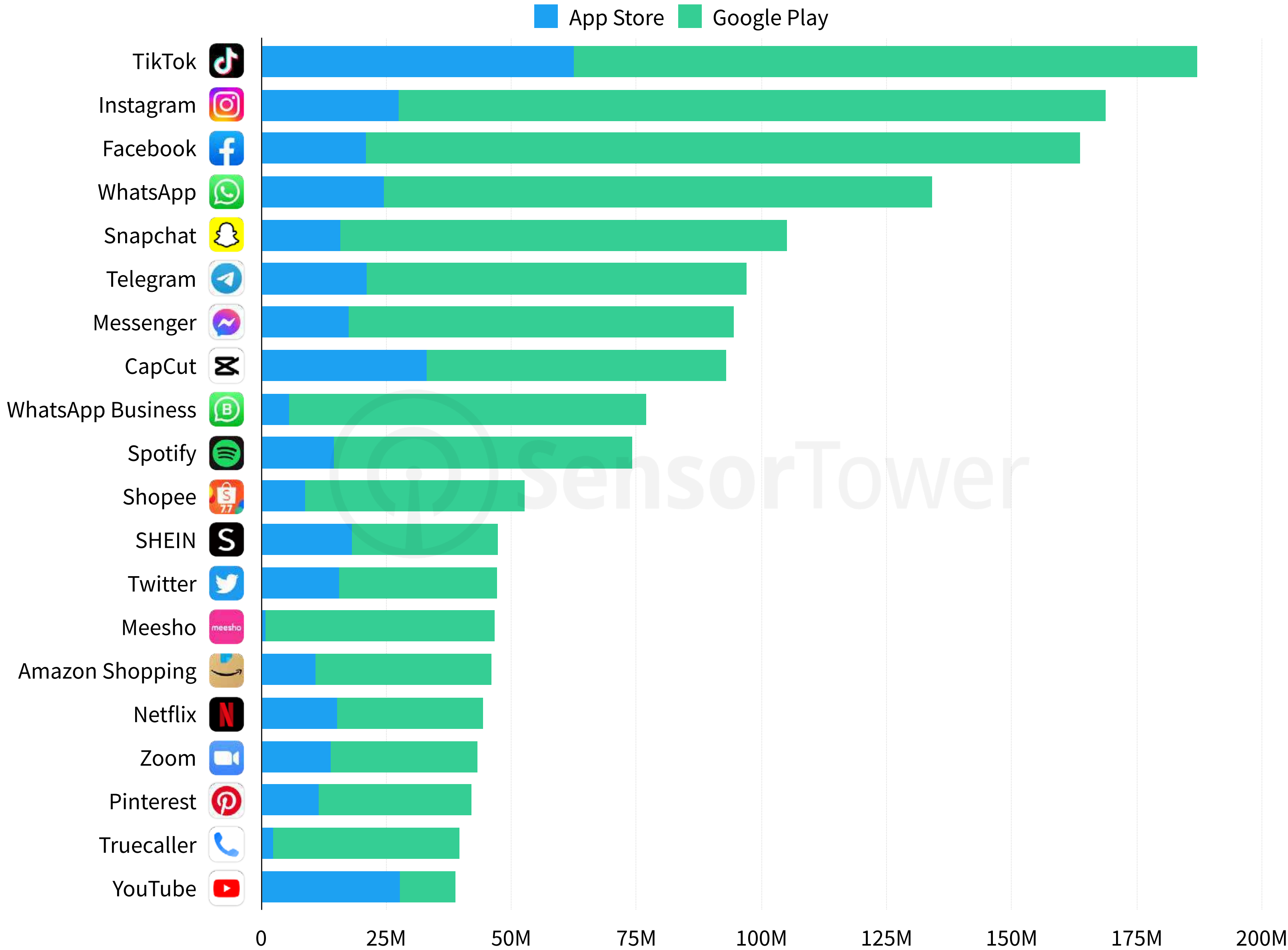
27.2 Billion

Google Play Downloads

Top Apps

Top Apps by Downloads in Q2 2022

Overall - Worldwide



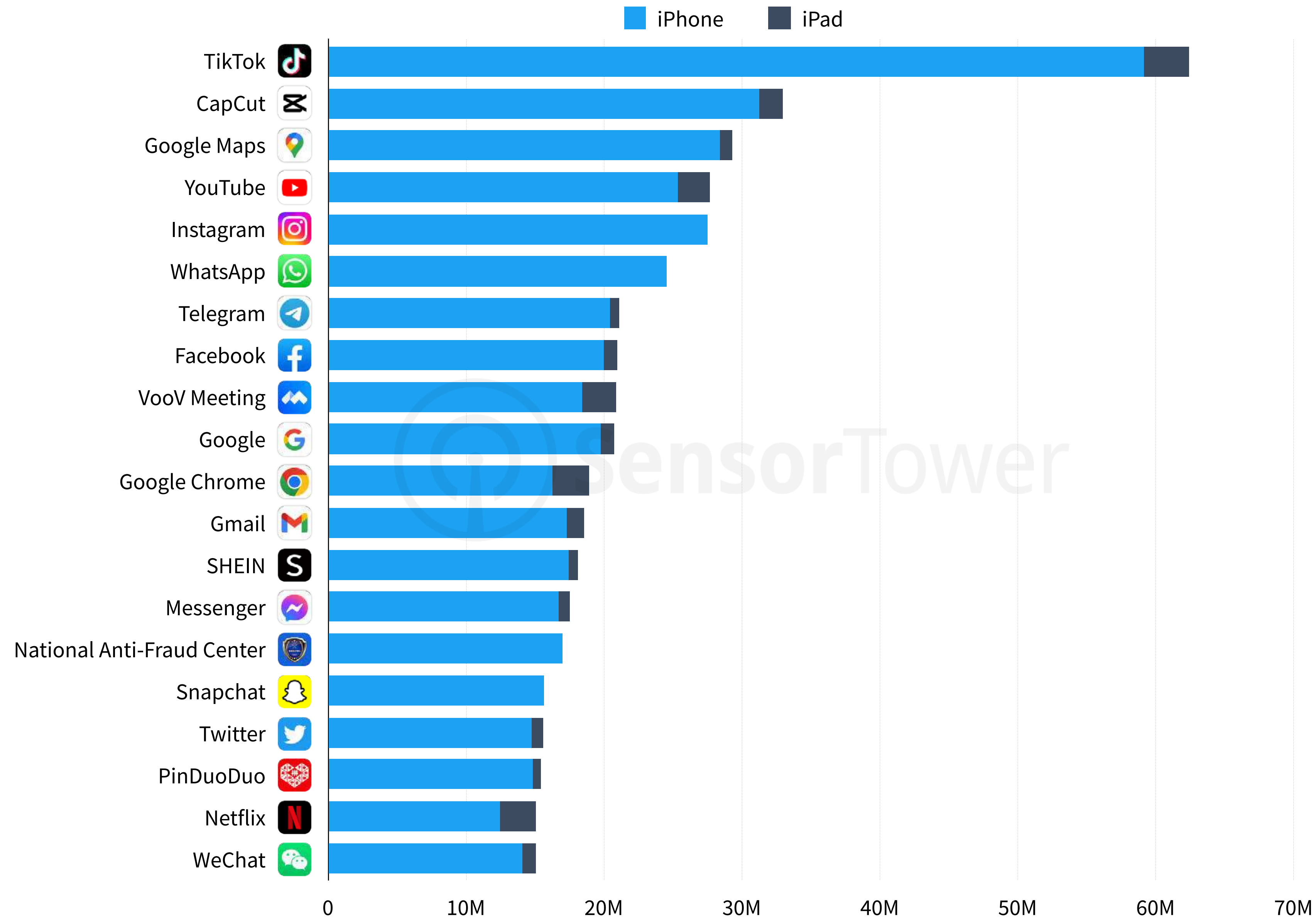
Top Apps by Worldwide Downloads

TikTok was once again the top app by downloads in Q2 2022, the eighth time in the past 10 quarters it's held the No. 1 spot. Only Zoom (Q2 2020) and Instagram (Q4 2021) have surpassed TikTok in a quarter since the beginning of 2020.

Meta held its place as the largest app publisher on mobile. **Half of the top 10 apps in Q2 2022 were from Meta, including Instagram, Facebook, and WhatsApp among the top five.**

Note Regarding Download Estimates
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App Store - Worldwide



Top Apps by Worldwide Downloads

ByteDance had the top two apps by App Store installs in Q2 2022 with TikTok and CapCut.

CapCut climbed from No. 6 in 1Q22 to No. 2 this quarter by continuing its expansion outside of China, with downloads outside of China accounting for more than 60 percent of its total this past quarter.

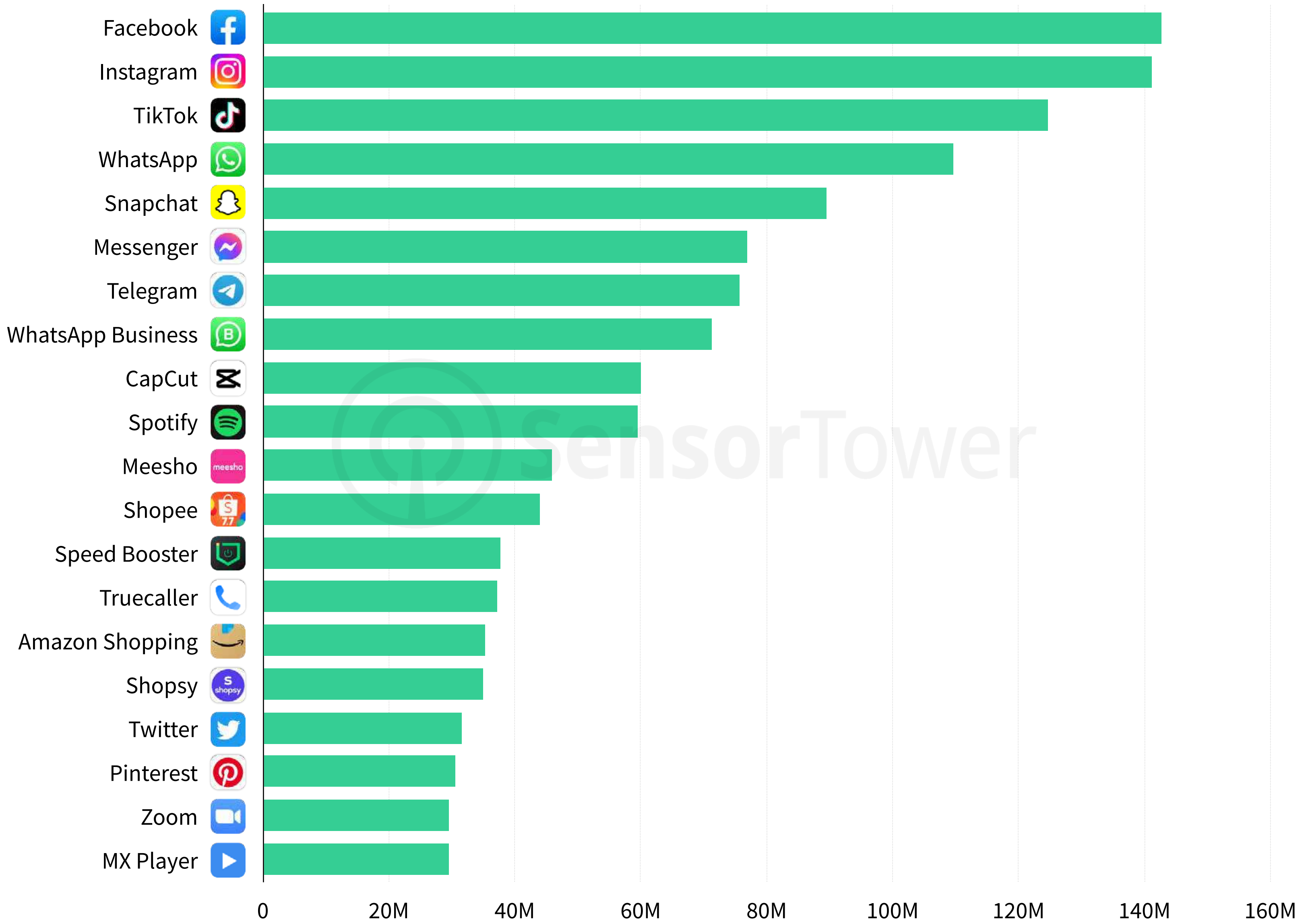
VooV Meeting ranked among the top 10 apps in Q2 2022 as China returned to remote work during COVID-19 lockdowns.

The app's installs were even higher than in Q1 and Q2 2020 at the start of the pandemic.

Note Regarding Download Estimates

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Google Play - Worldwide



Top Apps by Worldwide Downloads

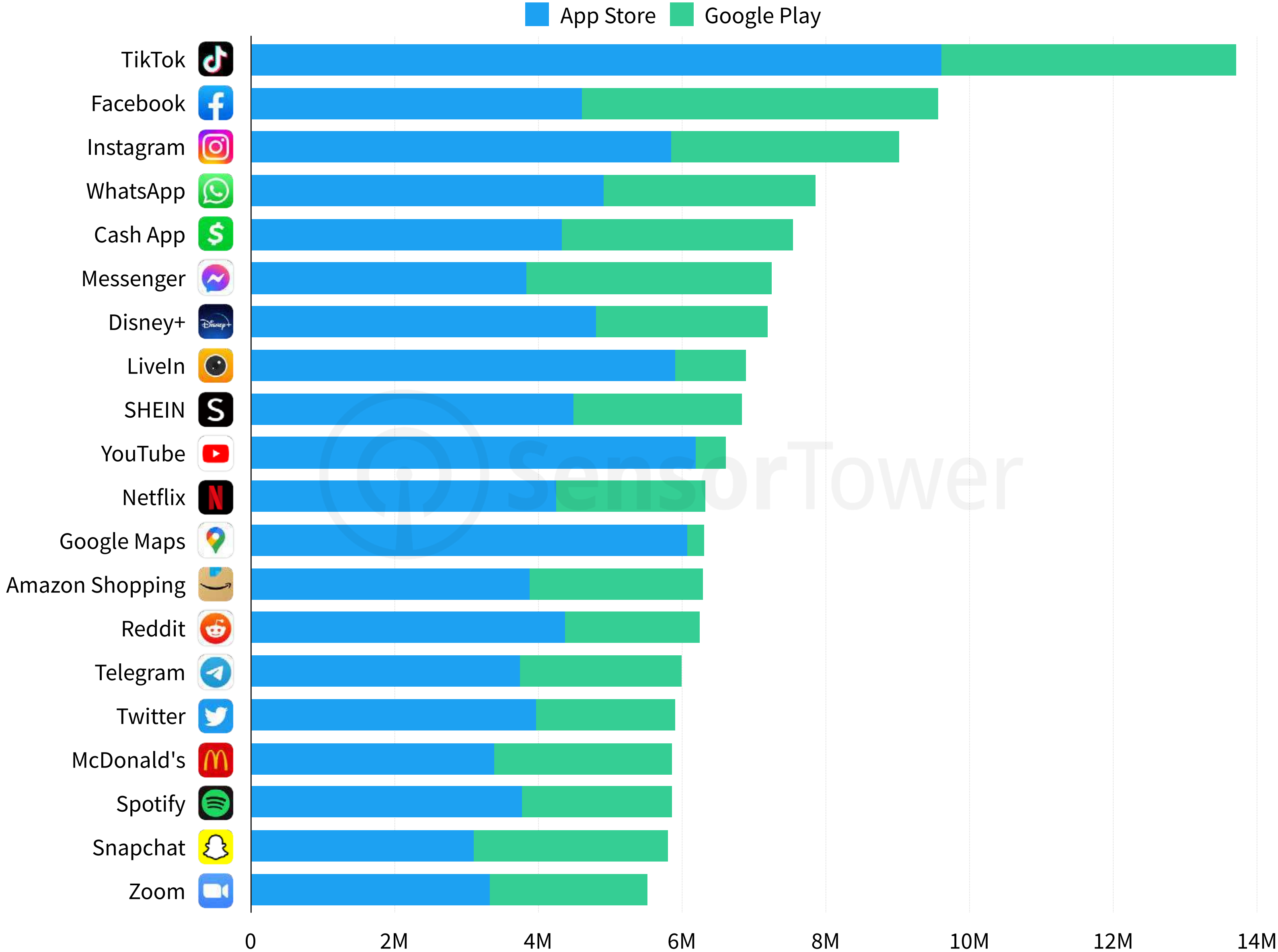
While ByteDance took the top spots on the App Store, Meta continued to lead on Google Play with the top two apps for the fourth straight quarter. Instagram had its best quarter yet with 141 million downloads on Google Play, up 27 percent year-over-year.

Even following its removal from India, the largest market for Google Play, TikTok has held steady as a top five app. It ranked third this quarter with 125 million downloads.

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Overall - United States



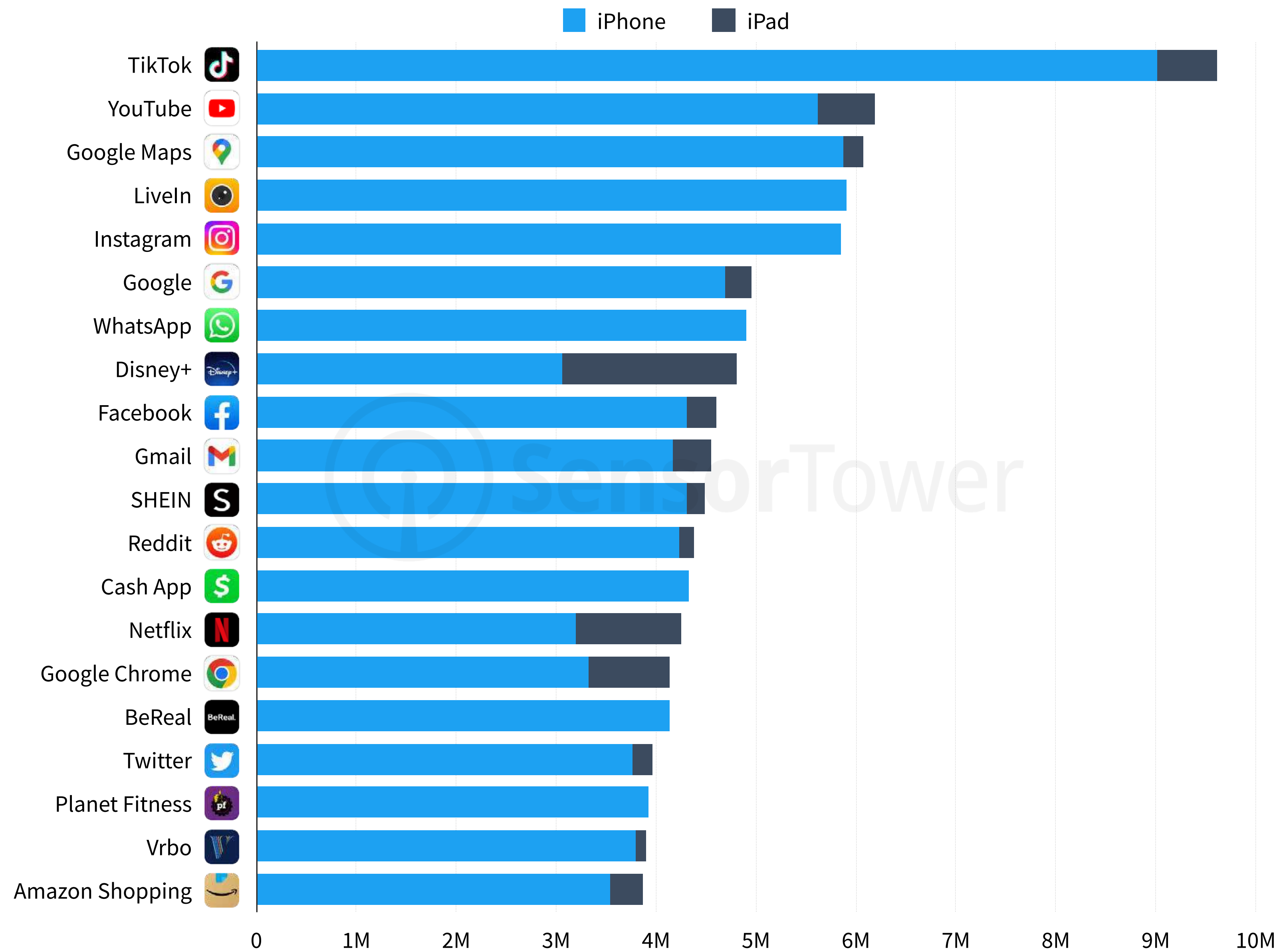
Top Apps by U.S. Downloads

In addition to being the top app in Q2 2022 globally, TikTok took the No. 1 spot in the United States. Its nearly 14 million downloads was more than four million ahead of the second app, Facebook.

Amazon's reign as the top Shopping app in the U.S. ended this quarter after it had held the top spot each quarter since Q4 2018. SHEIN, a fast-fashion retail app based in China, had more U.S. downloads than Amazon for the first time in Q2 2022.

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App Store - United States



Top Apps by U.S. Downloads

While TikTok and YouTube held the top spots on the U.S. App Store, both experienced substantial quarter-of-quarter declines.

TikTok's installs dropped below 10 million for the first time since the start of 2020, while YouTube downloads fell 43 percent Q/Q.

Several social photo apps have found success on the App Store using widgets released with iOS 14. LiveIn ranked among the top five in Q2 2022, and BeReal gained popularity by prompting users to share a more authentic, unfiltered snapshot of their lives.

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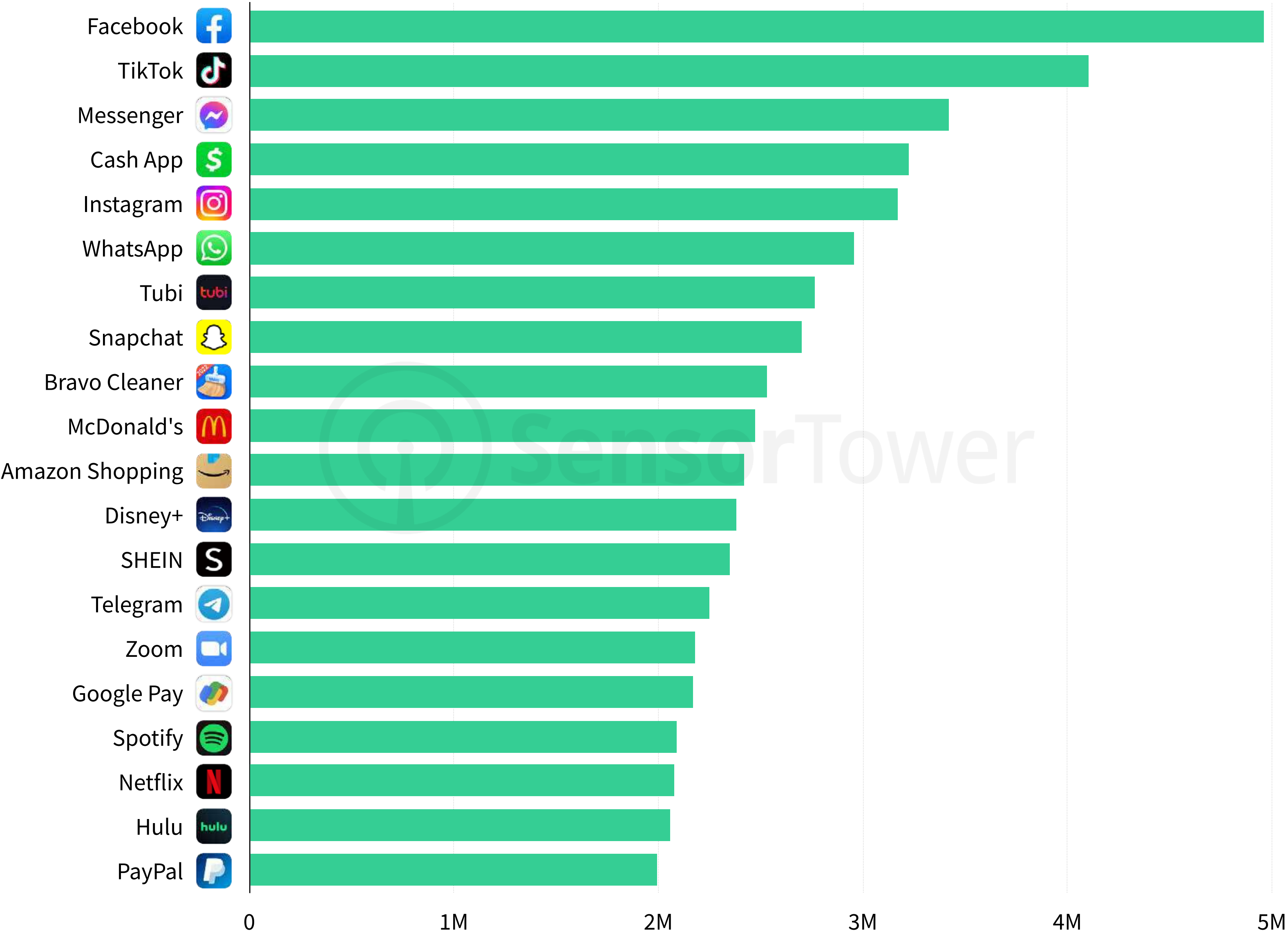
Google Play - United States

Top Apps by U.S. Downloads

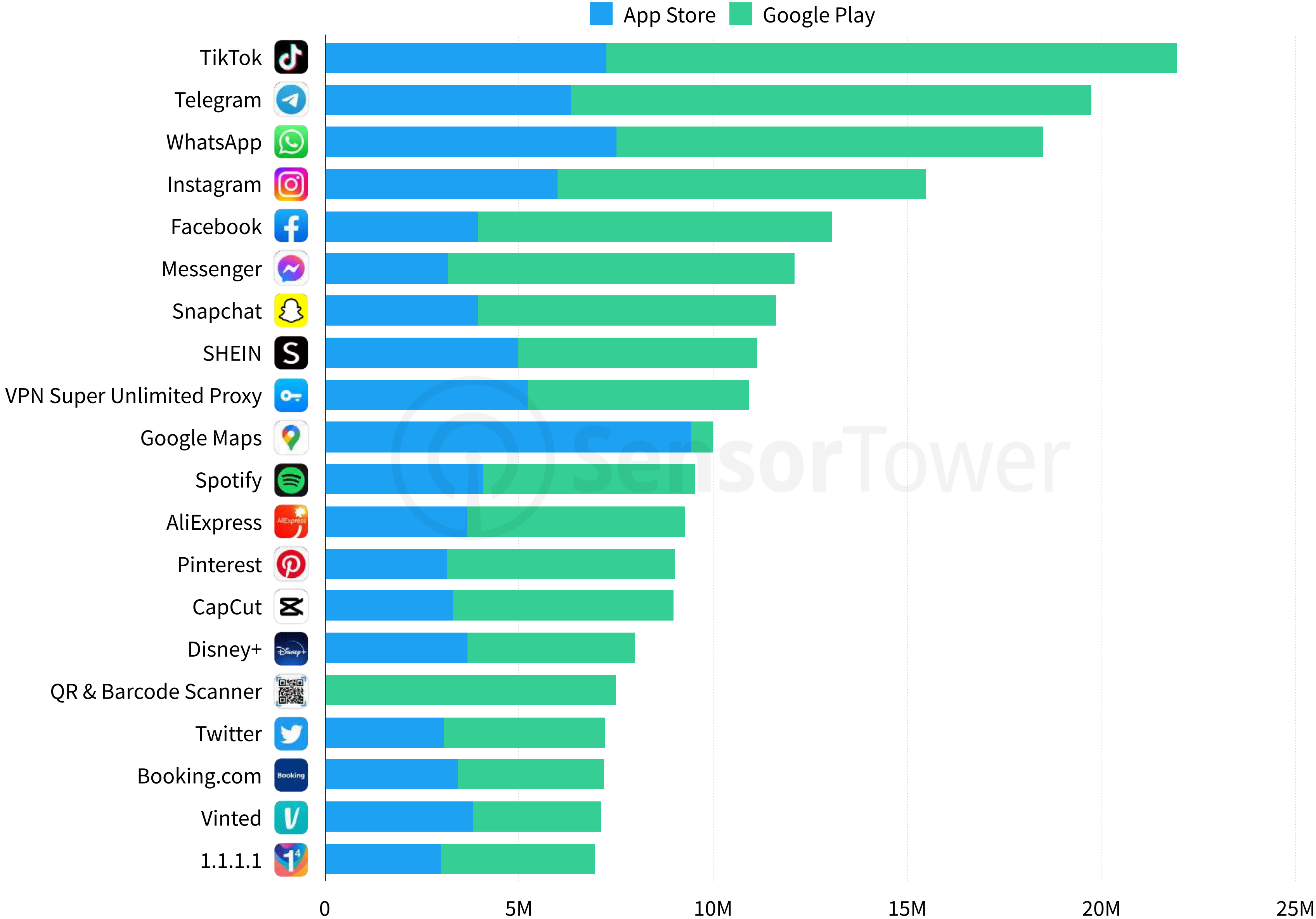
Facebook regained the top spot in the U.S. on Google Play from TikTok in Q2 2022. Facebook last held the No. 1 position a year prior in Q2 2021. Its nearly 5 million downloads this quarter was its highest total in four years.

McDonald's has continued to prioritize adoption of its mobile app, incentivizing consumers with a rewards program and easy ordering. It reached the top 10 on Google Play after ranking outside of the top 20 a year prior following 47 percent year-over-year growth.

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Overall - Europe



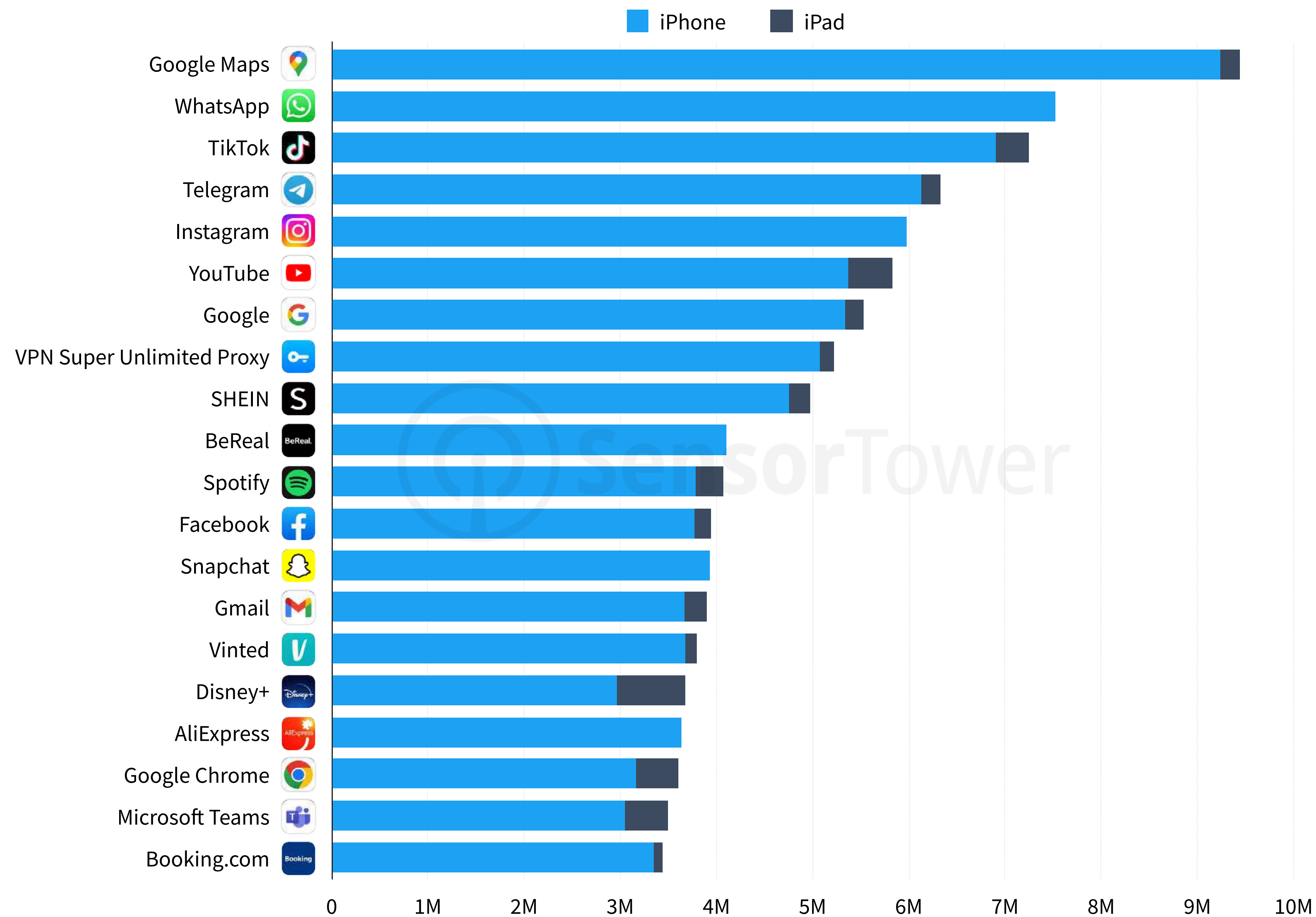
Top Apps by European Downloads

TikTok was once again the top app by downloads in Q2 2022. Telegram rose one position since last quarter to No. 2, while WhatsApp fell one spot to No. 3. Instagram and Facebook remained stable during the quarter at No. 4 and No. 5, respectively.

France and Ukraine were Telegram’s fastest growing countries by raw growth in Europe during Q2 2022, while Russia remained the app’s largest market by overall downloads.

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App Store - Europe



Top Apps by European Downloads

Google Maps became the No. 1 App Store app in Europe for the first time since at least 2012 in Q2 2022. The app grew 20 percent quarter-over-quarter to 9 million downloads amid the restart of summer travel in the continent.

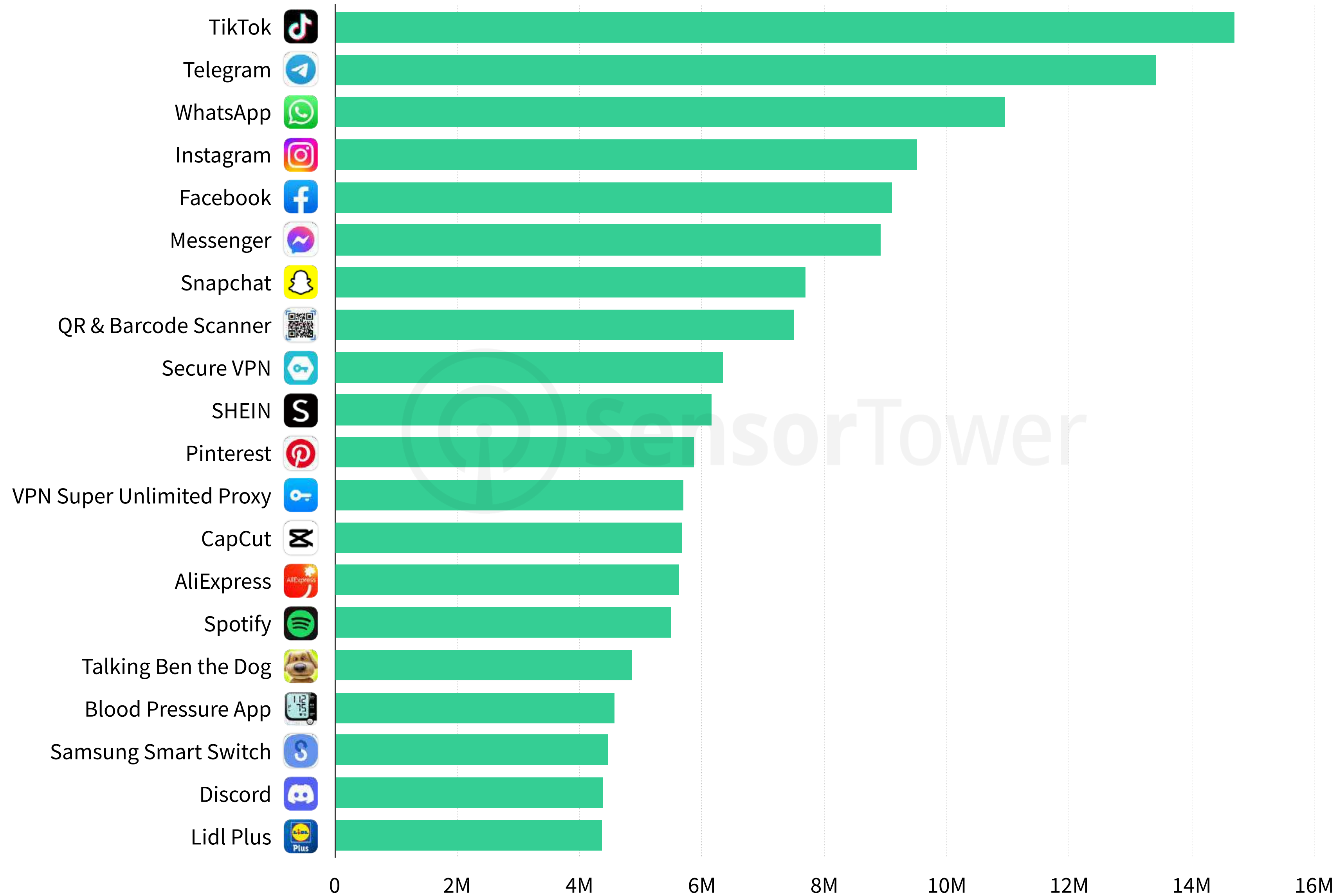
Germany, Turkey, and France were among Google Maps' fastest growing markets on the App Store.

SHEIN re-entered the top 10 for the first time since Q2 2021. The U.K. overtook Russia as SHEIN's largest market in Europe on the App Store in the past quarter. Spain and France followed as the second and third largest markets.

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Google Play - Europe



Top Apps by European Downloads

TikTok was once again the top App Store app in Europe in Q2 2022. The app has held the top spot on Google Play over the the past eight quarters. However, Telegram was not far behind last quarter with more than 13 million downloads.

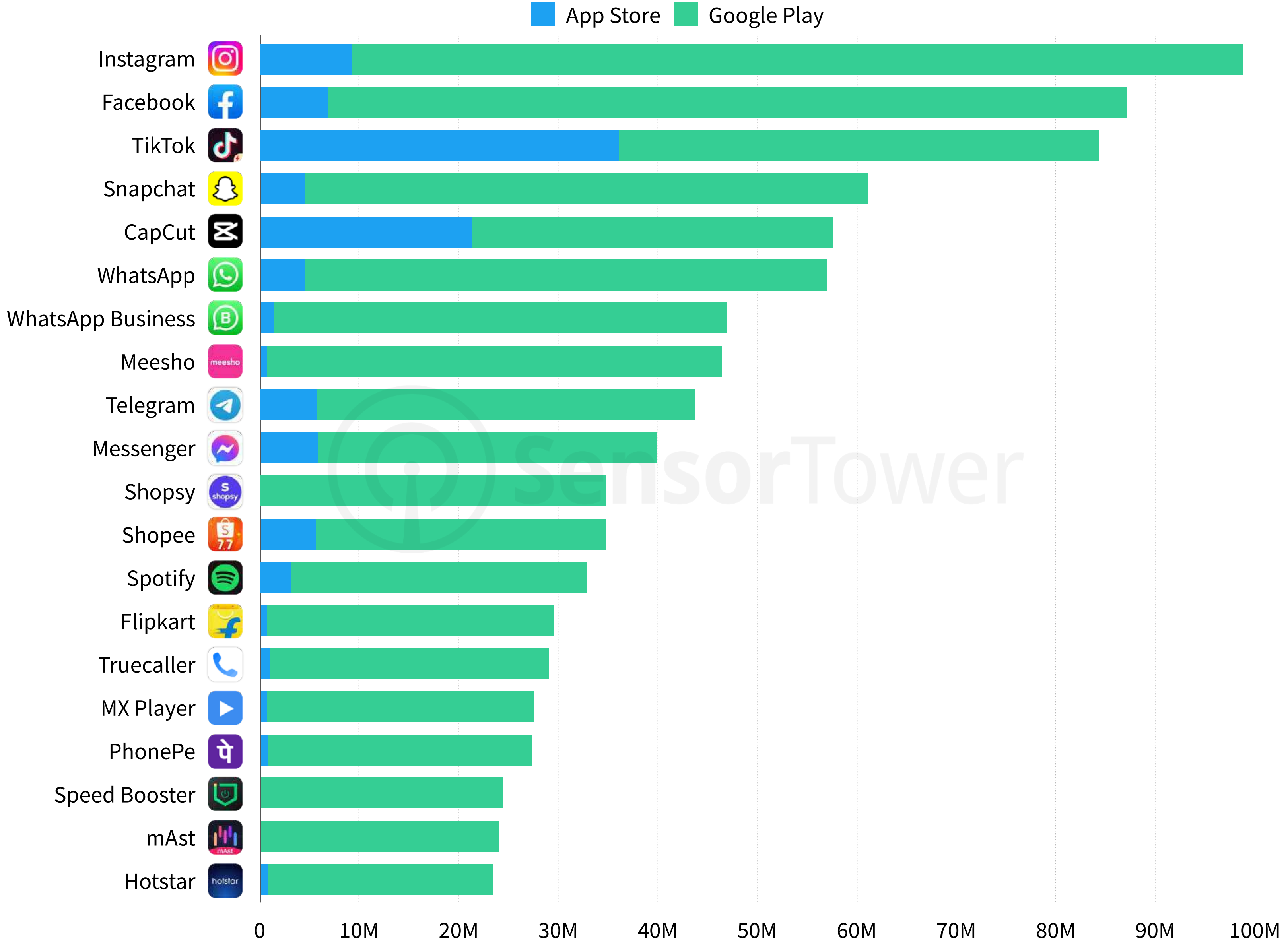
WhatsApp rose by one position to become the No. 3 most installed app in Europe for the quarter.

There was not a lot of turnover among top apps last quarter. Secure VPN and SHEIN were the only two apps to enter the top 10, at No. 9 and No. 10, respectively.

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Overall - Asia



Top Apps by Asia Downloads

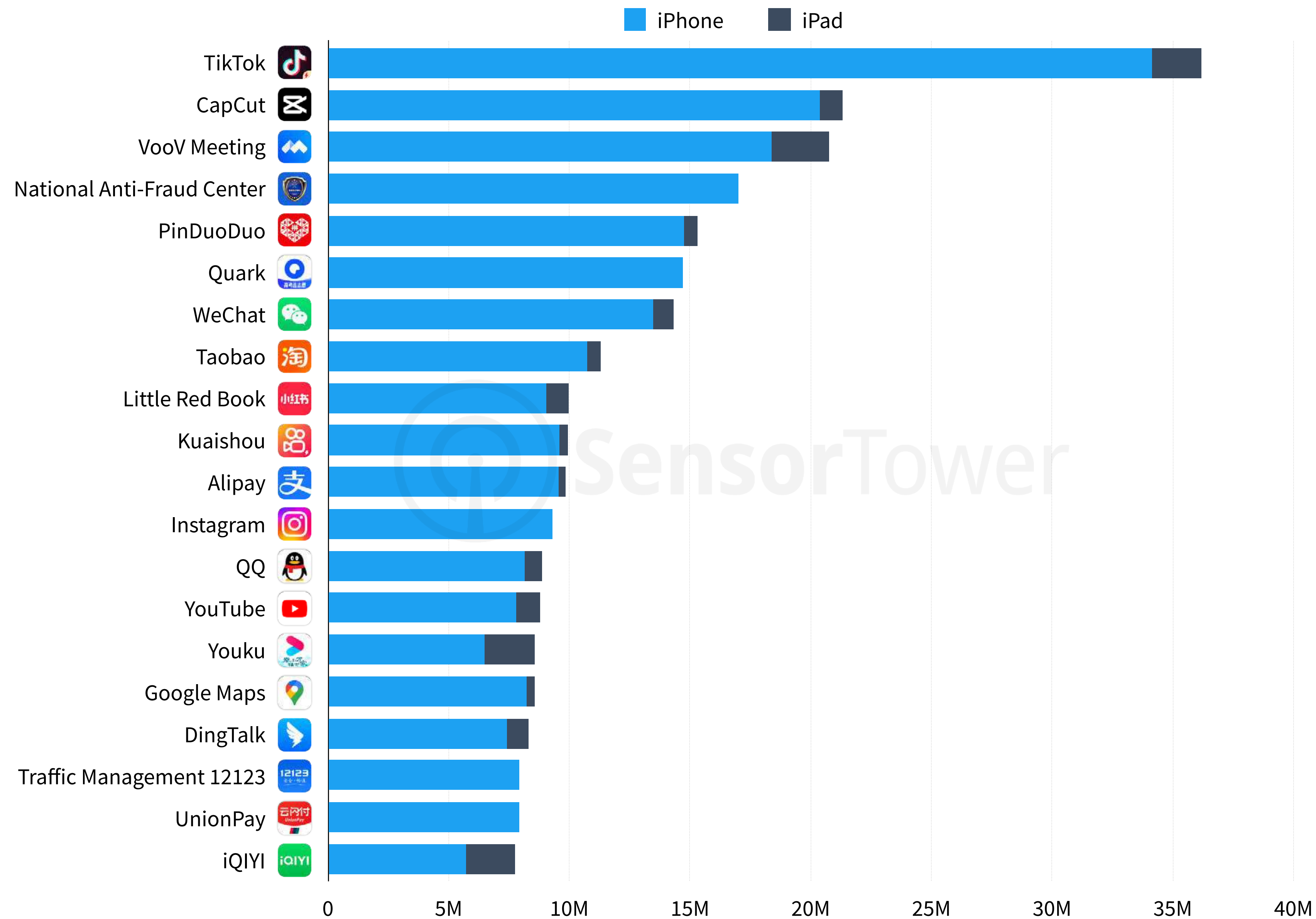
Instagram was the top app for the fourth straight quarter in Q2 2022, followed by another Meta-owned app, Facebook. Instagram was the top app in India, and the country accounted for nearly 65 percent of Instagram’s installs in the Asia region.

TikTok, which held the top spot in the U.S. and Europe, ranked No. 3 in Asia during Q2 2022. It managed this despite being banned in India, the largest market for app installs in the world, as well as TikTok’s largest market until Q2 2020.

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App Store - Asia



Top Apps by Asia Downloads

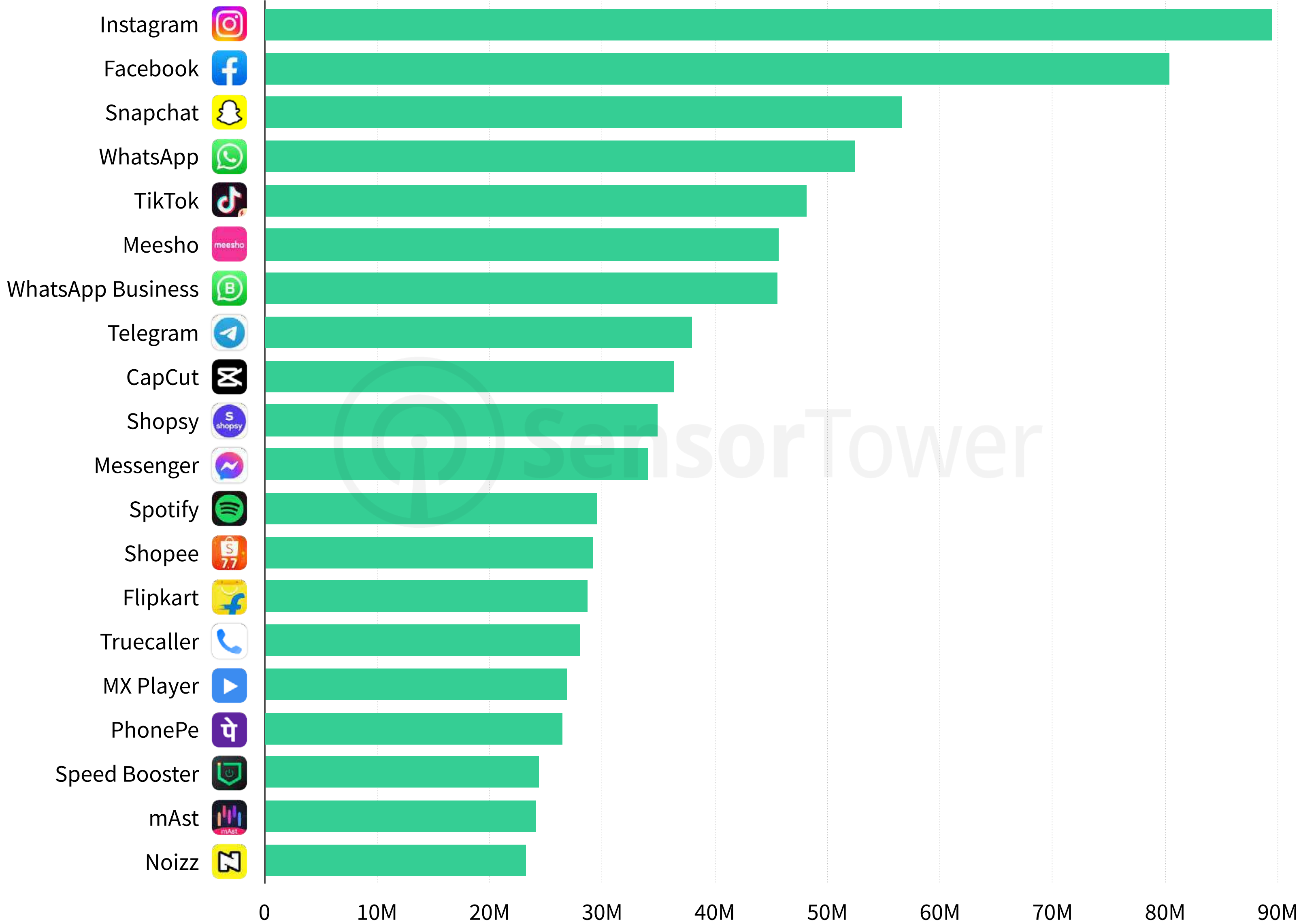
ByteDance had the top two apps in Asia on the App Store in Q2 2022. CapCut surpassed 20 million downloads, recording its best quarter on the App Store since Q4 2019.

As China continued to enforce lockdowns against a surge in COVID-19, including in Shanghai, the country's largest city, VooV Meeting's downloads in China climbed 47 percent quarter-over-quarter to more than 20 million. The app hit a new adoption record in April 2022 with installs in its home market surpassing 11 million, even higher than those registered at the start of the COVID-19 pandemic.

Note Regarding Download Estimates

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Google Play - Asia



Top Apps by Asia Downloads

Instagram was once again the top Google Play app in Asia in Q2 2022, ahead of Facebook and Snapchat. Instagram accounted for 22 percent of Meta’s Google Play installs in Asia in Q2 2022.

India was the largest market in Asia for Instagram on Google Play, accounting for 70 percent of its downloads in Q2 2022. This was higher than the share India contributed to any other app in the top five, though India was still the top country in Asia for each of these apps with the exception of TikTok.

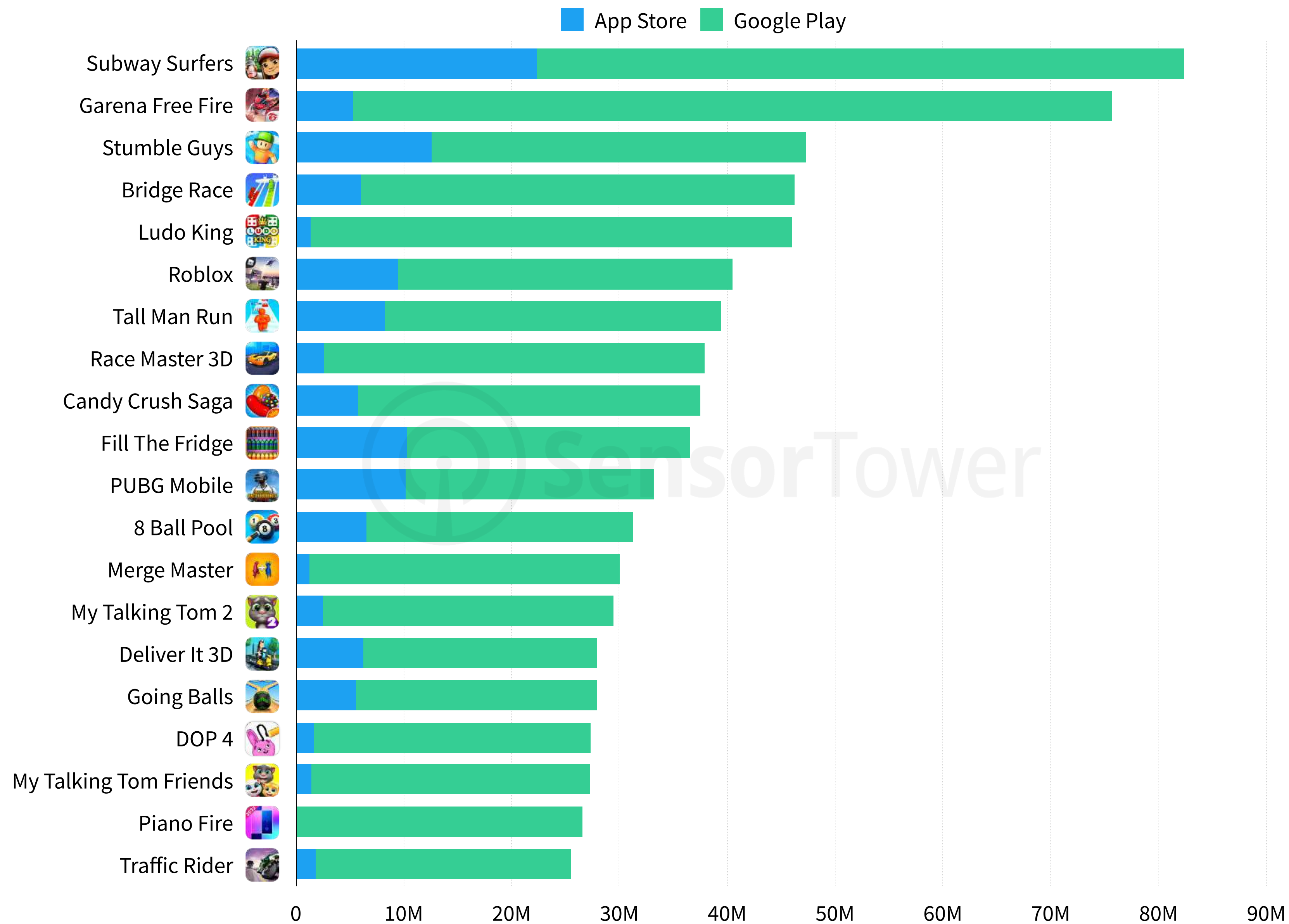
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Top Games

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Top Games by Downloads in Q2 2022

Overall - Worldwide



Top Games by Worldwide Downloads

Subway Surfers was the top mobile game globally in Q2 2022 with more than 80 million downloads, its highest total since at least 2014.

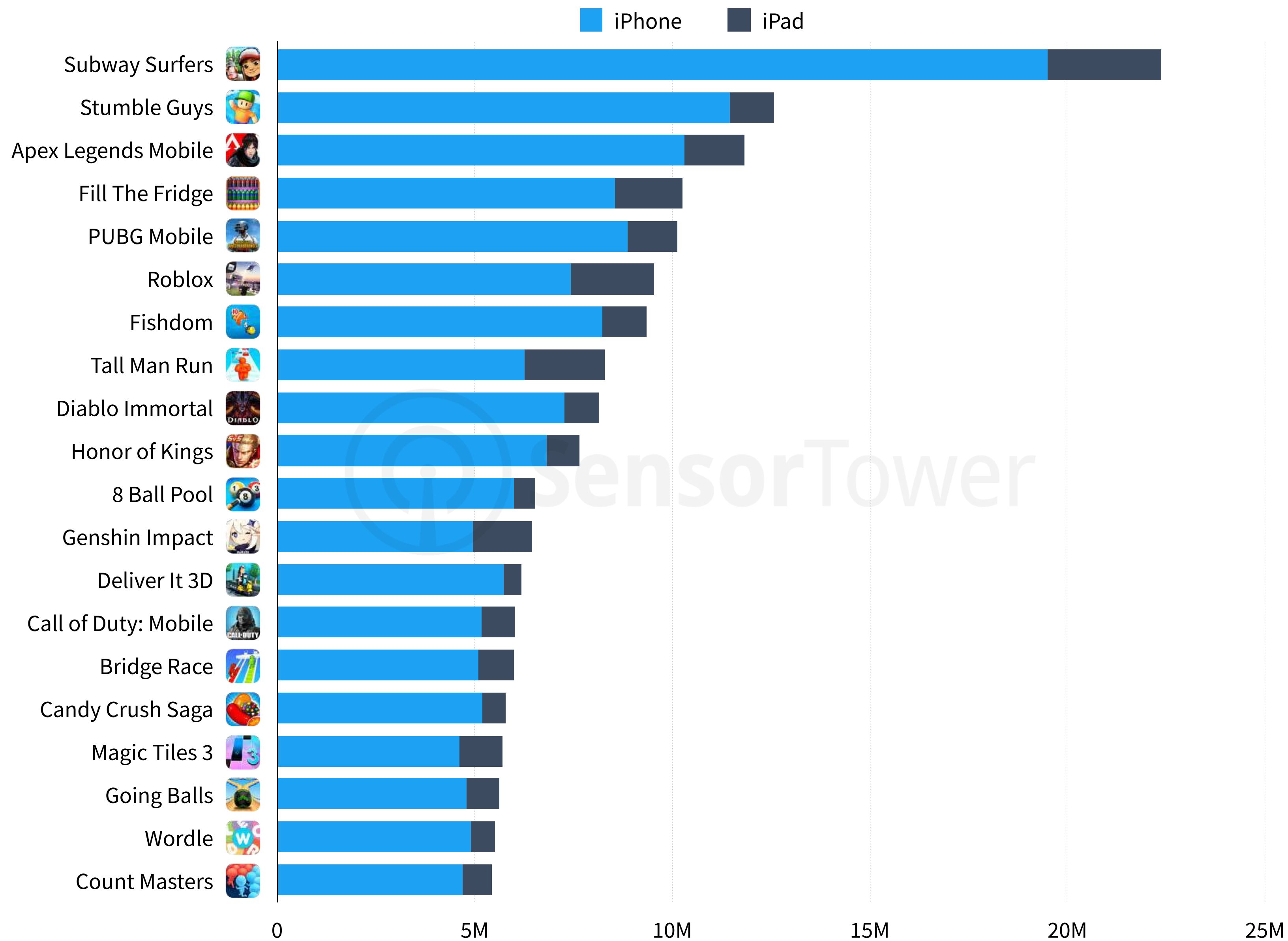
Its recent success clearly caught the attention of mobile games giant Miniclip, which acquired Subway Surfers creator Sybo in late June 2022.

Runner-up Garena Free Fire also had another huge Q2, reaching 70 million installs for the third straight quarter. More than half of its installs in 2Q22 came from its higher resolution version, Free Fire MAX, though its worth noting that the original version still accounted for nearly 90 percent of its all-time downloads.

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App Store - Worldwide



Top Games by Worldwide Downloads

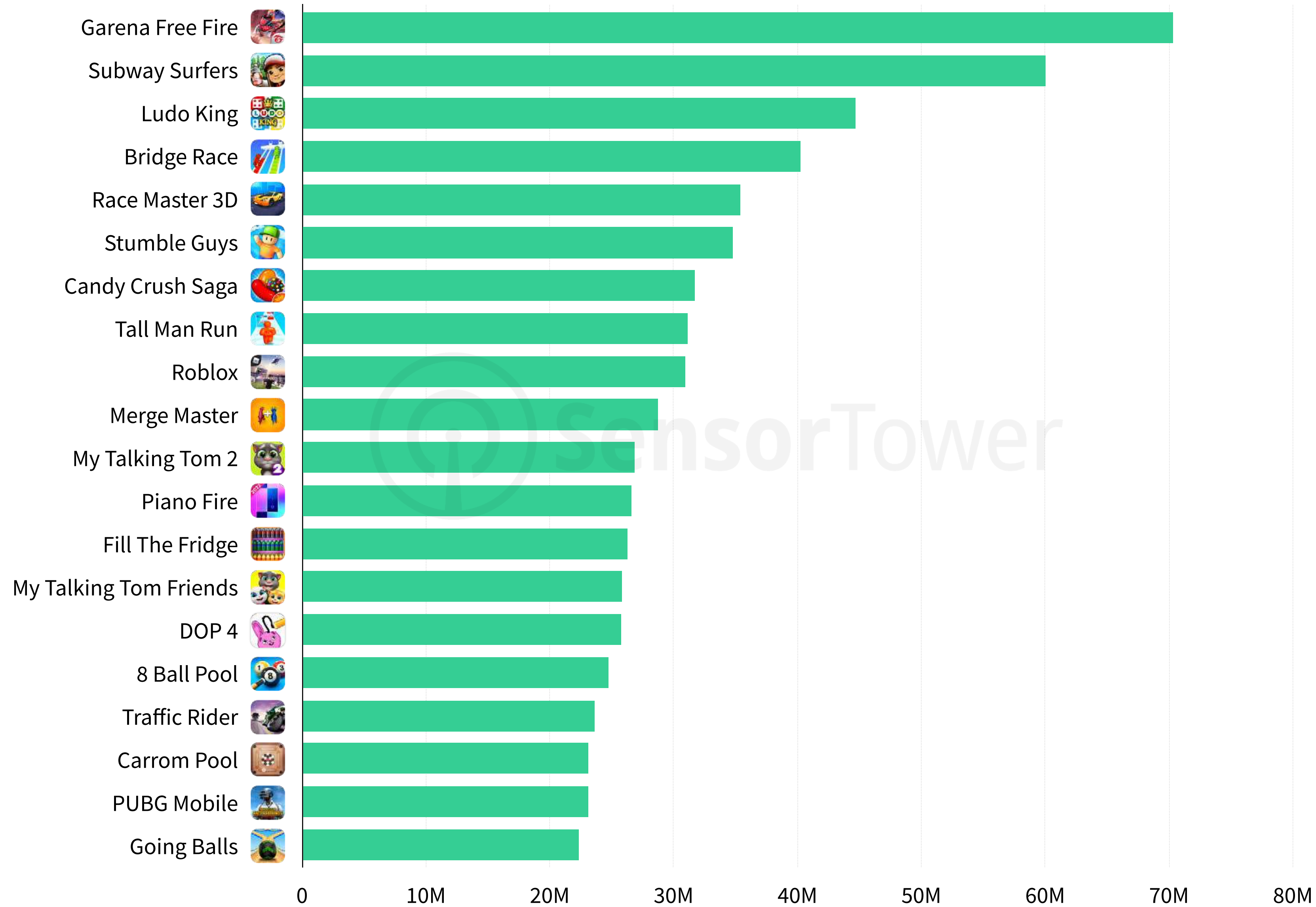
Subway Surfers dominance was most prominent on the App Store, where it had the best quarter for a mobile game since hit title Among Us back in Q4 2020. Its installs more than doubled year-over-year.

The top 20 list featured two huge launches on mobile this quarter, Apex Legends Mobile from Electronic Arts released in mid-May and Diablo Immortal from Blizzard launched in early June. Both titles were immediate hits, ranking among the top 10 by App Store downloads in Q2 2022.

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Google Play - Worldwide



Top Games by Worldwide Downloads

Garena Free Fire was once again boosted by Free Fire MAX installs, ranking as the top game on Google Play for the third straight quarter.

Garena Free Fire MAX as well as the original version each would have ranked among the top 10 games by themselves this quarter.

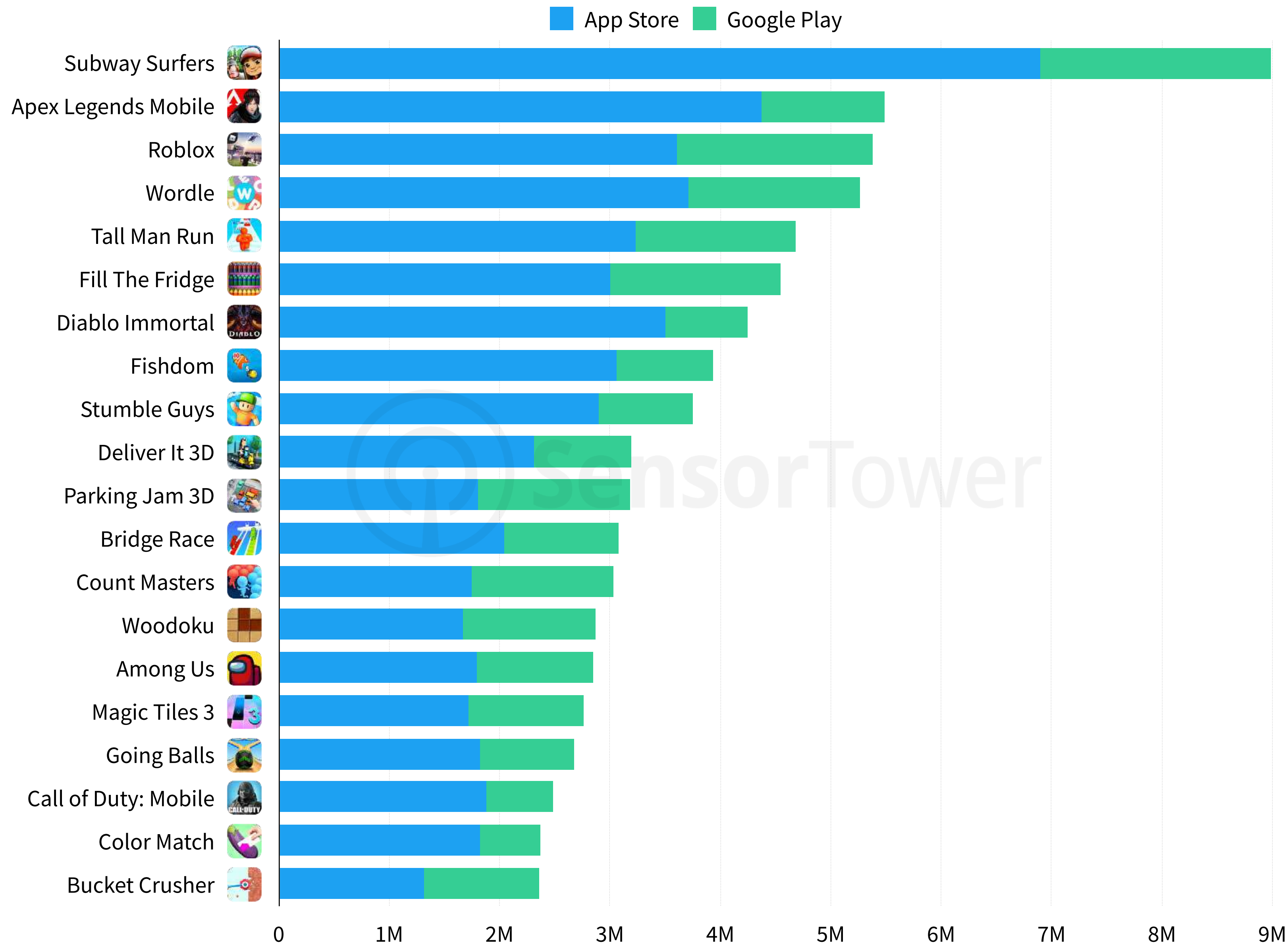
Subway Surfers, the top game on the App Store, ranked second on Google Play.

Miniclip, who recently acquired Subway Surfers, also had 8 Ball Pool among the top 20 games in Q2 2022.

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Overall - United States



Top Games by U.S. Downloads

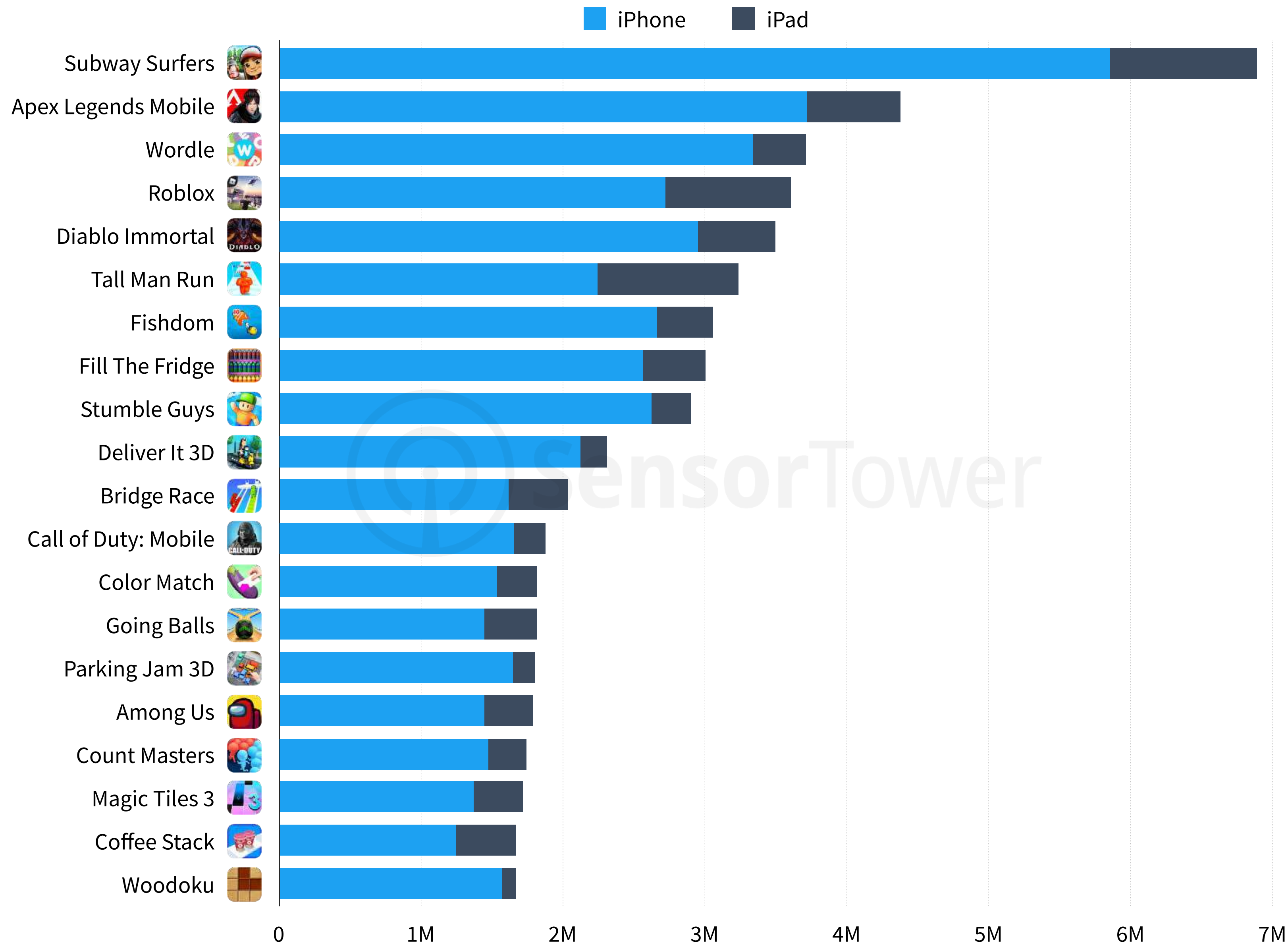
Subway Surfers, Apex Legends Mobile, and Roblox were the top games in the U.S. in Q2 2022. Wordle, the top game from Q1, fell to fourth this quarter.

Hypercasual games publisher Supersonic Studios had four of the top 20 games in the U.S., including Tall Man Run at No. 5 and Bridge Race at No. 13. Overall, the publisher had its best quarter yet in the country with more than 34 million downloads.

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App Store - United States



Top Games by U.S. Downloads

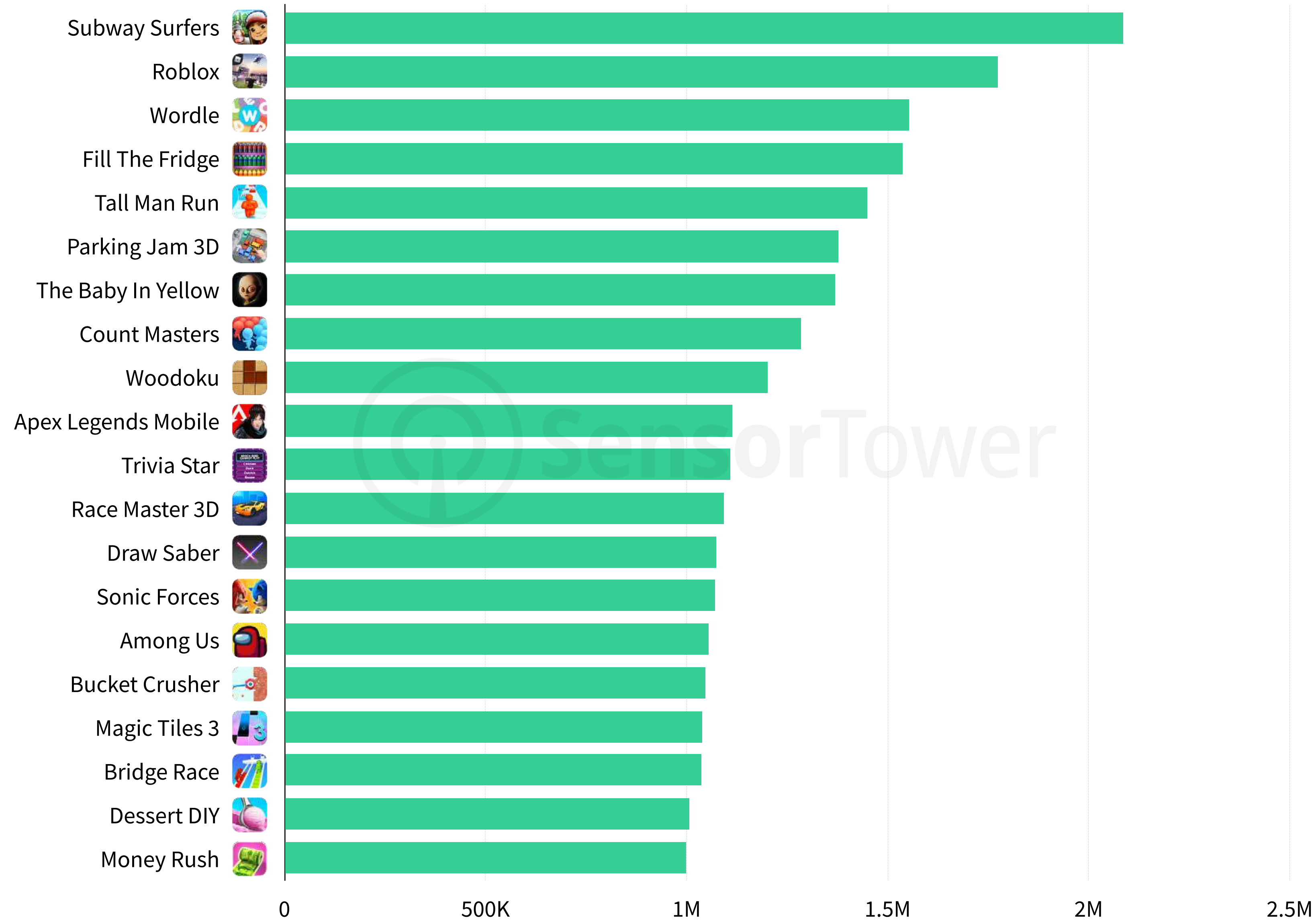
Newly launched titles **Apex Legends Mobile** and **Diablo Immortal** were particularly popular on the U.S. App Store, both ranking among the **top five games by downloads**. They were the only mid-core games among the top 10, with the rest being casual games.

U.S. downloads for Subway Surfers spiked in Q2 2022, climbing from 3.8 million in Q1 2022 to 6.9 million in Q2. Its previous high since the start of 2012 was 5.9 million in Q3 2020.

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Google Play - United States



Top Games by U.S. Downloads

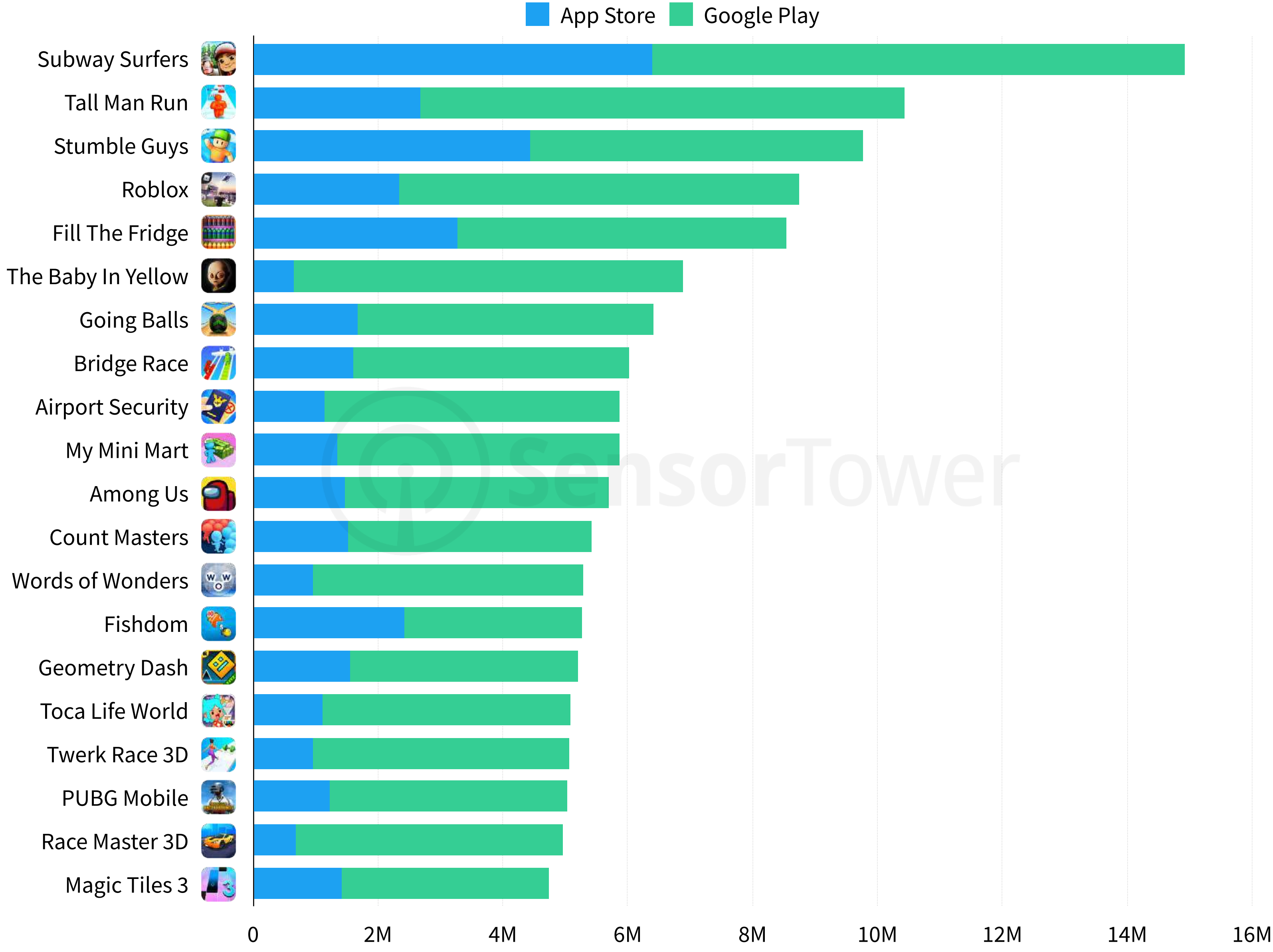
Subway Surfers swept the top platforms in the U.S., leading games on both the App Store and Google Play. It edged out consistent top 10 performer Roblox to take the top spot. In fact, Q2 2022 marked the first quarter that Subway Surfers surpassed Roblox in U.S. downloads on Google Play since Q1 2017.

Hypercasual was the most common genre among the top games with Fill The Fridge leading nine of the top 20 titles. Puzzle had four top titles, while Arcade had three.

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Overall - Europe



Top Games by European Downloads

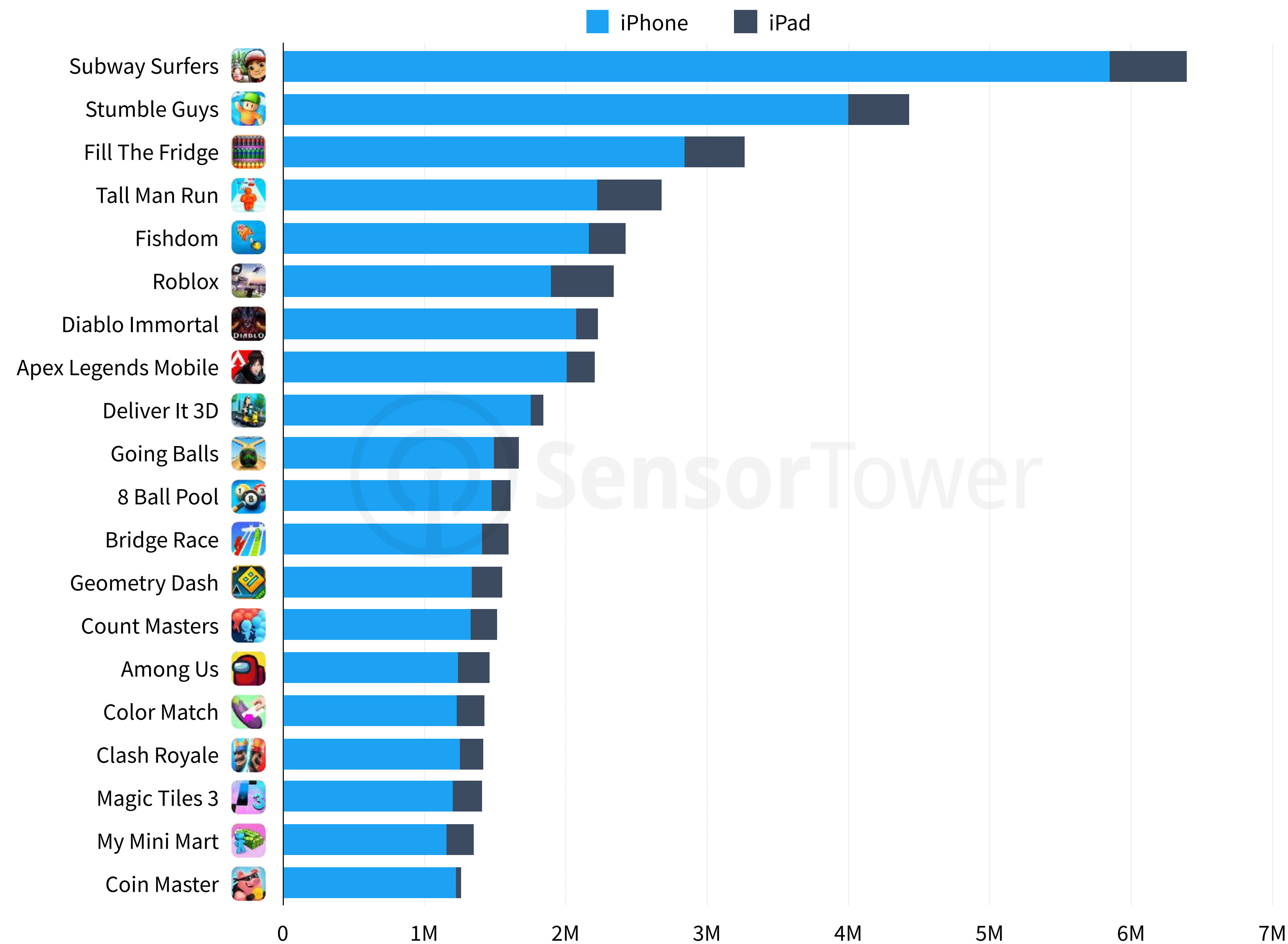
Subway Surfers had its best quarter in Europe since Q1 2015. Its nearly 15 million downloads were up 121 percent year-over-year and 17 percent quarter-over-quarter. Russia was the app’s largest market in the past quarter, overtaking Turkey.

Tall Man Run, one of Supersonic Studios’ latest hit hypercasual titles this year, ranked second, surpassing Roblox this quarter. Tall Man Run was the only other mobile game alongside Subway Surfers to surpass 10 million downloads in Q2 2022.

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App Store - Europe



Top Games by European Downloads

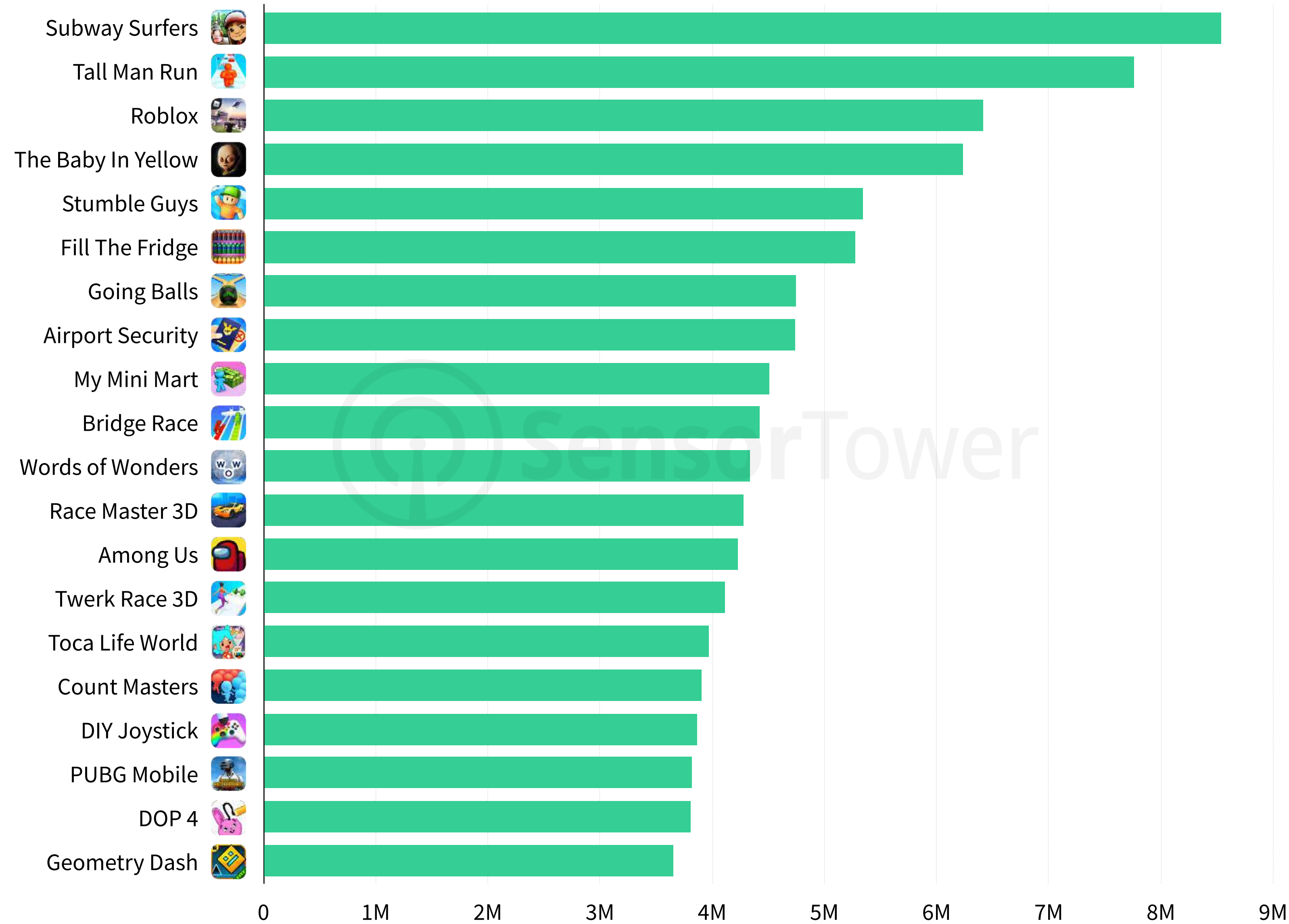
Supersonic Studios had five of the top 20 games on the App Store, including Tall Man Run at No. 4, Going Balls (No. 10), Bridge Race (No. 12), Color Match (No. 16) and My Mini Mart (No. 19). This helped Supersonic Studios rank as the No. 5 overall publisher on the App Store in Europe behind Google, Meta, Microsoft, and Take-Two Interactive.

Subway Surfers was the No. 1 Game by adoption on the App Store. The app recorded more than 6 million downloads in Q2 2022, its best quarter in Europe since its launch in 2012.

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Google Play - Europe



Top Games by European Downloads

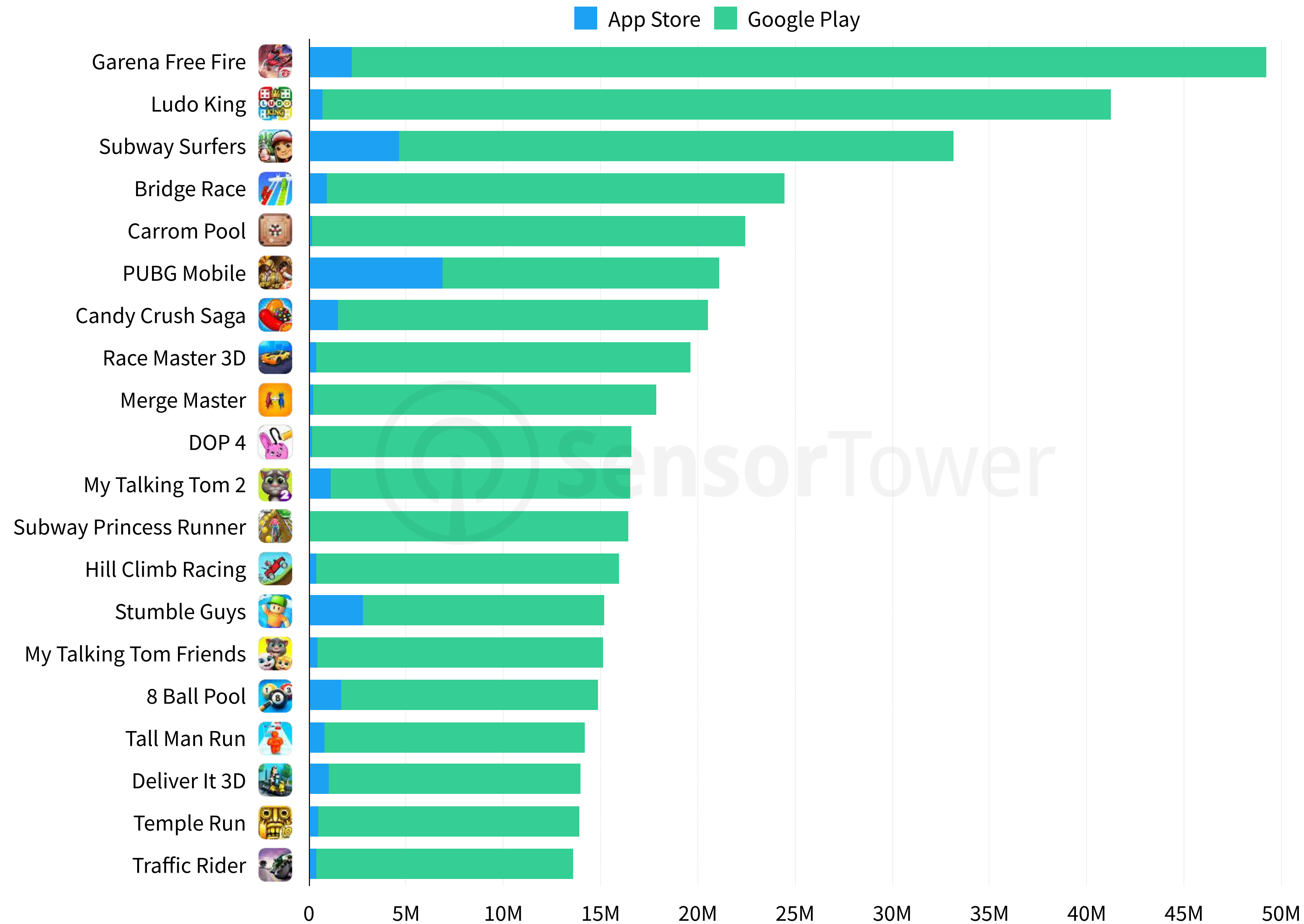
Subway Surfers was the top game on Google Play for the second quarter in a row, with installs up 3 percent quarter-over-quarter to 8.5 million downloads. Tall Man Run ran close behind with nearly 8 million downloads.

The Baby in Yellow and Stumble Guys each moved into the top five. Q2 2022 was the best quarter by adoption for both apps since their launch and both also saw installs more than double quarter-over-quarter.

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Overall - Asia



Top Games by Asia Downloads

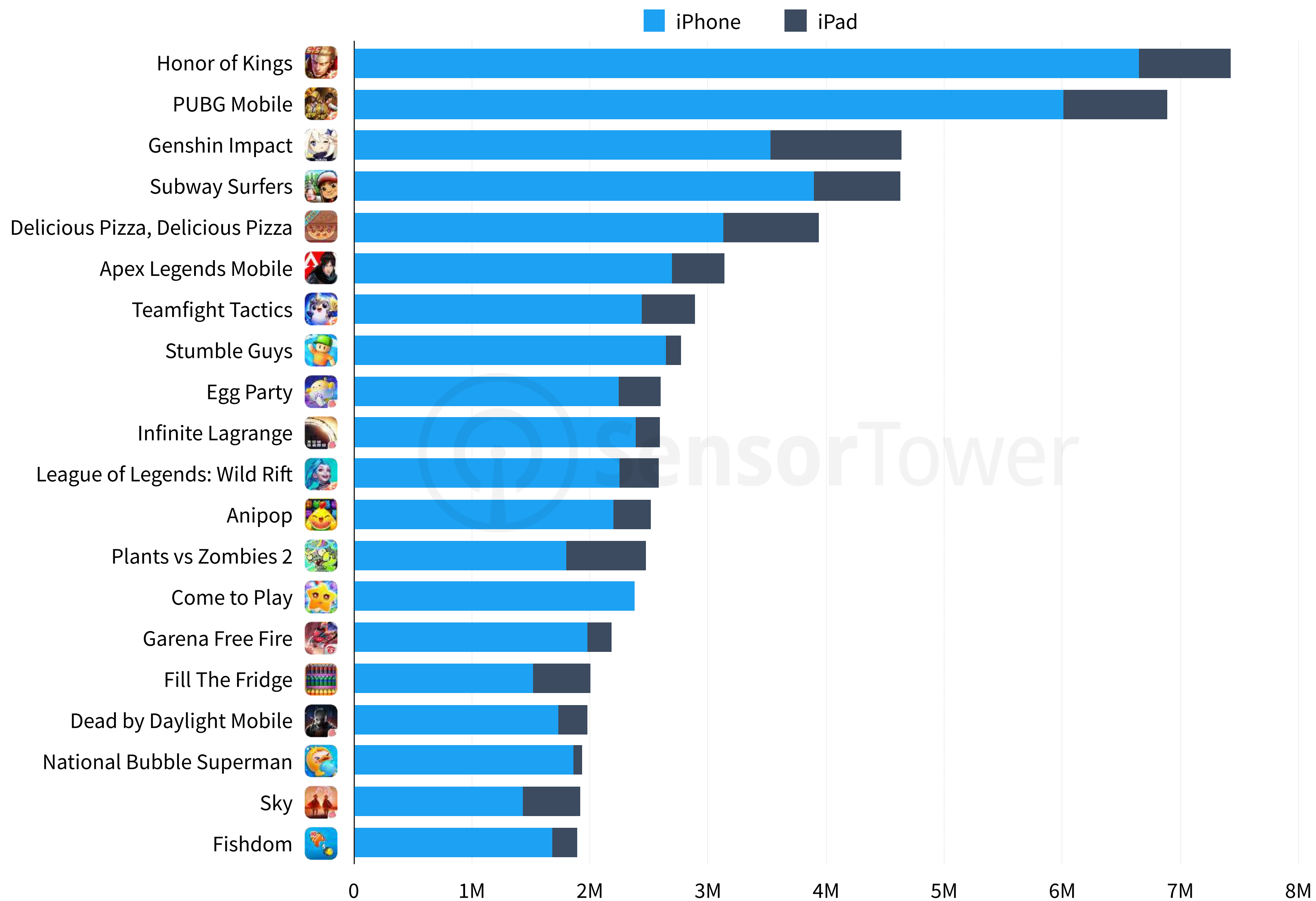
Garena Free Fire, Ludo King, and Subway Surfers have held the top three spots in each of the past three quarters. Each of these games surpassed 33 million installs in Q2 2022. No other app had more than 25 million downloads

Bridge Race entered the top 20 in Q2 2022 as the fourth most downloaded game during the quarter. It led three hypercasual games among the top 10 ahead of Merge Master from Homa Games and DOP 4 from Say Games.

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App Store - Asia



Top Games by Asia Downloads

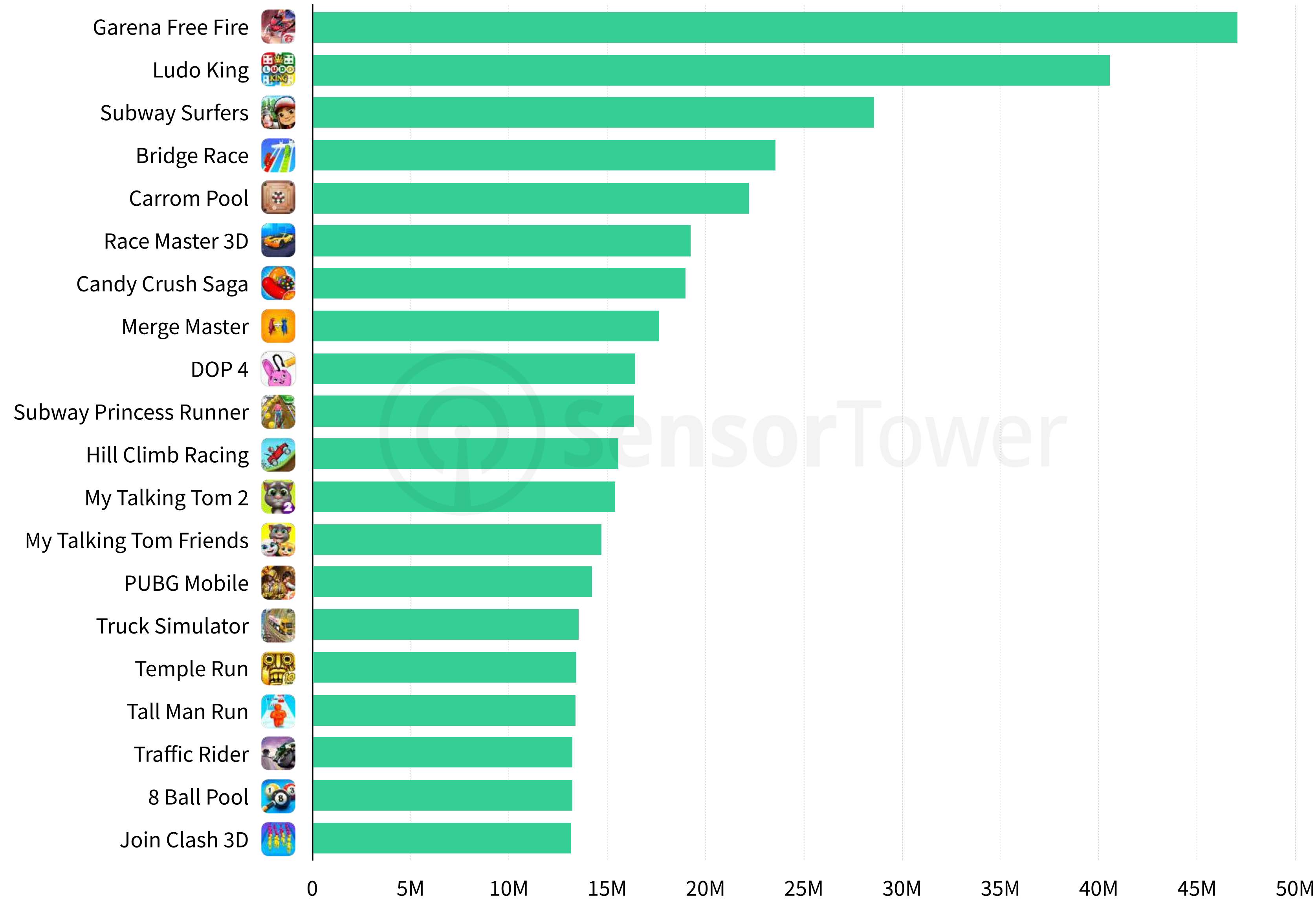
Honor of Kings from Tencent was the top game on the App Store in Asia surpassing 7 million downloads. Another Tencent title, PUBG Mobile, ranked No. 2 in the region with nearly 7 million installs for the quarter.

Apex Legends Mobile debuted at No. 6 on the App Store in Asia. It ranked second in the U.S. and eighth in Europe this quarter despite only being available for roughly half the quarter after its launch in mid-May.

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Google Play - Asia



Top Games by Asia Downloads

Garena Free Fire and its newer version with better graphics, Garena Free Fire MAX, was the top game on Google Play for the third straight quarter. Nearly three-quarters of its downloads in Asia were from Free Fire MAX in Q2 2022.

Subway Surfers rose one spot last quarter to rank as the No. 3 game in Asia. India accounted for 45 percent of its installs in the region, followed by Indonesia at 16 percent. Asia and Latin America were the only regions in which Subway Surfers was not the top mobile game in Q2 2022.

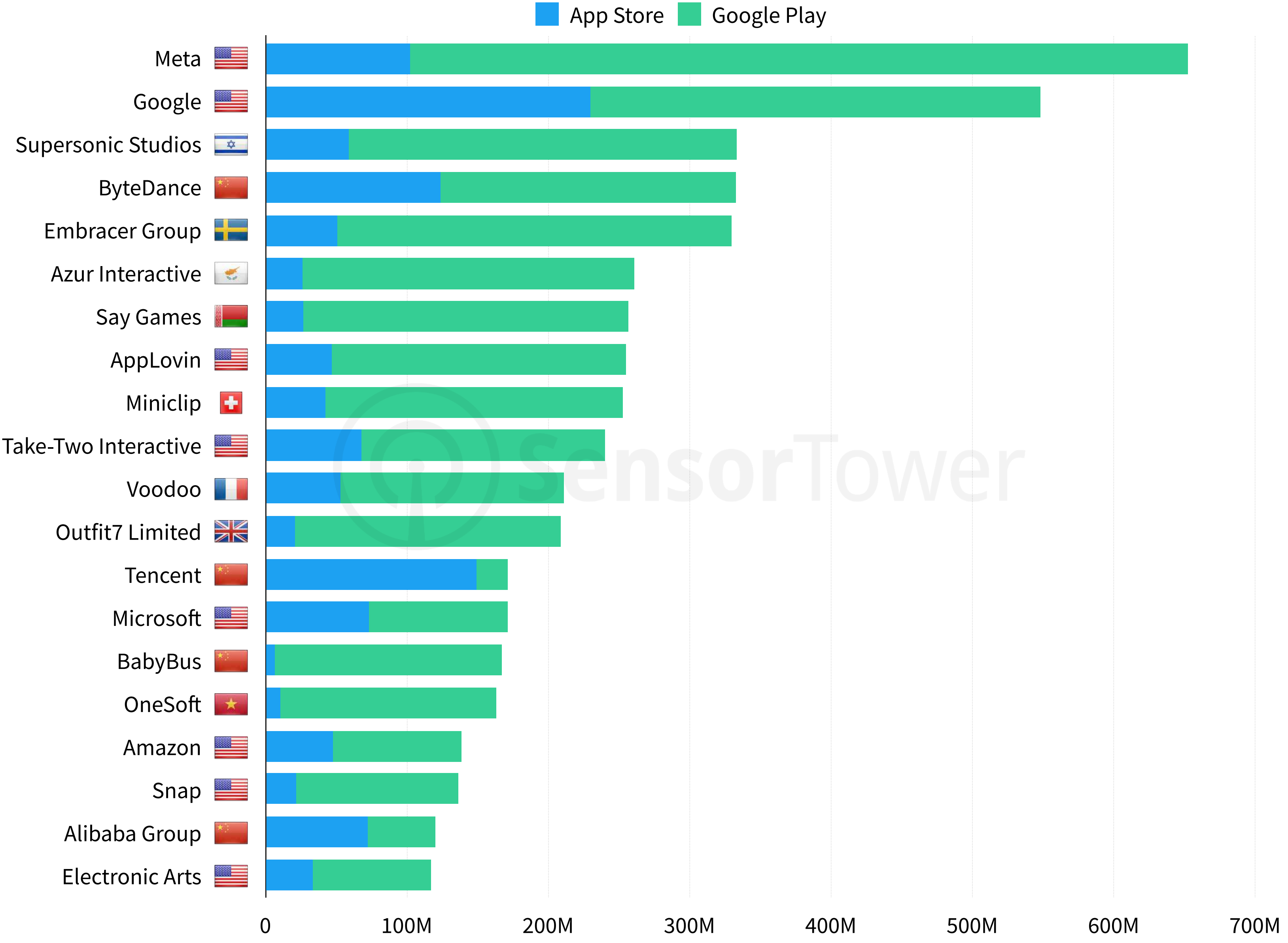
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Top Publishers

Top Publishers by Downloads in Q2 2022

Overall - Worldwide



Top Publishers by Worldwide Downloads

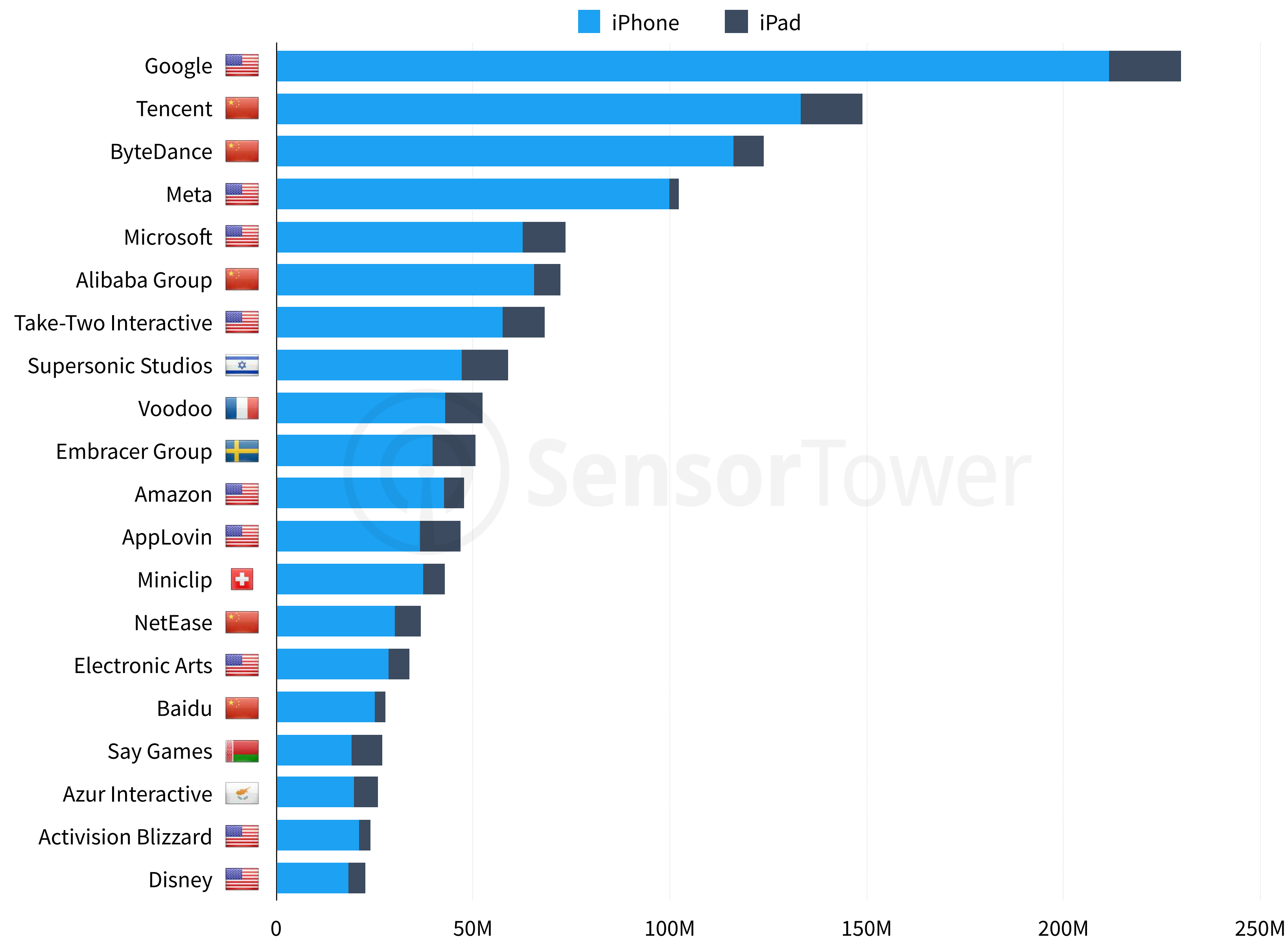
Meta and Google have consistently been the top two app publishers by installs for years, with Meta taking the top spot in Q2 2022. Meta’s downloads climbed 11 percent year-over-year, while Google’s declined 22 percent during the same period.

Games publisher Supersonic Studios was the only publisher to enter the top five in Q2 2022, moving up from No. 8 in Q1. It was the first of seven publishers among the top 10 that primarily focus on games.

Note Regarding Download Estimates
 Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Apr. 1 through Jun. 30, 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

Google was once again the top publisher on the App Store with nearly 230 million downloads.

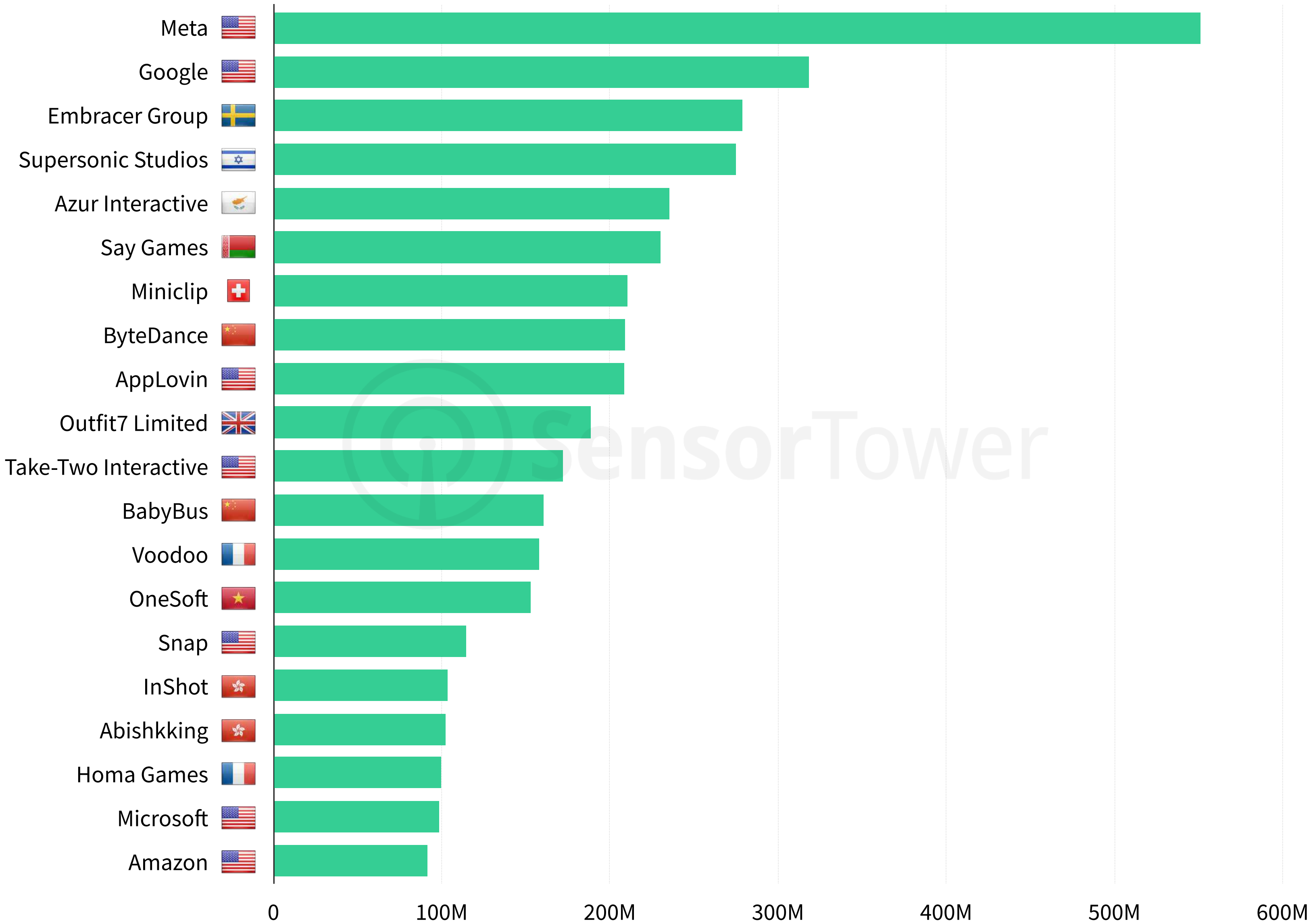
Chinese publishers Tencent and ByteDance rounded out the top three.

Publishers based in the U.S. and China controlled the top spots on the App Store. This makes sense given these publishers knowledge of the two biggest markets on the App Store, with the U.S. and China combining for 45 percent of all installs on the platform in Q2 2022.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Apr. 1 through Jun. 30, 2022. Apple apps are excluded. We report unique installs only (one download per User).

Google Play - Worldwide



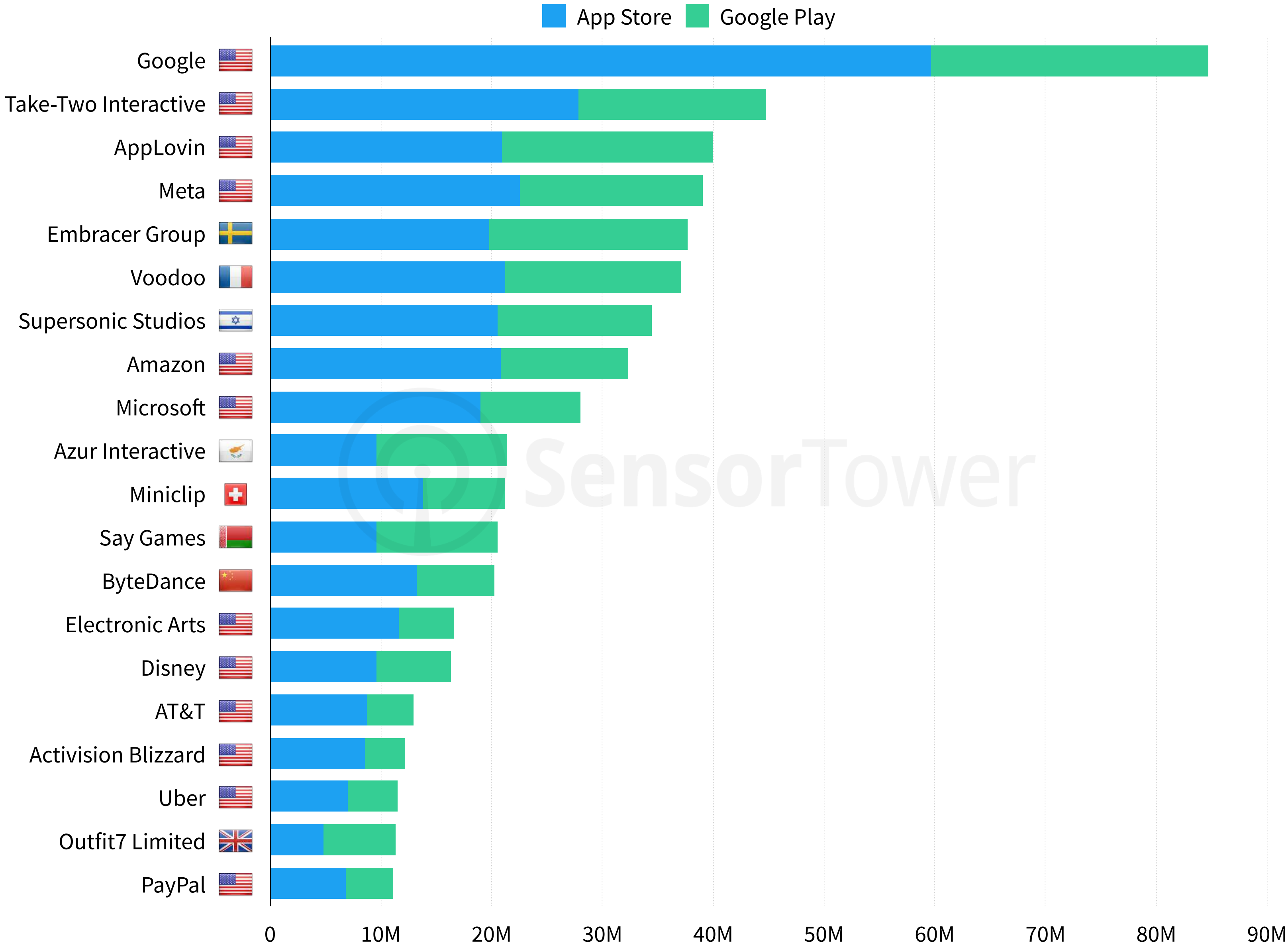
Top Publishers by Worldwide Downloads

Meta was the top publisher on Google Play for the sixth straight quarter and expanded its lead over Google. Meta had more than 550 million downloads in Q2 2022, well ahead of Google’s nearly 320 million.

Miniclip ranked among the top 10 publishers on Google Play, boosted by its acquisition of Subway Surfer’s publisher Sybo. Subway Surfers was its top game with nearly 30 percent of its Google Play installs in Q2 2022.

Note Regarding Download Estimates
 Our estimates include worldwide daily download totals for Google Play for Apr. 1 through Jun. 30, 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

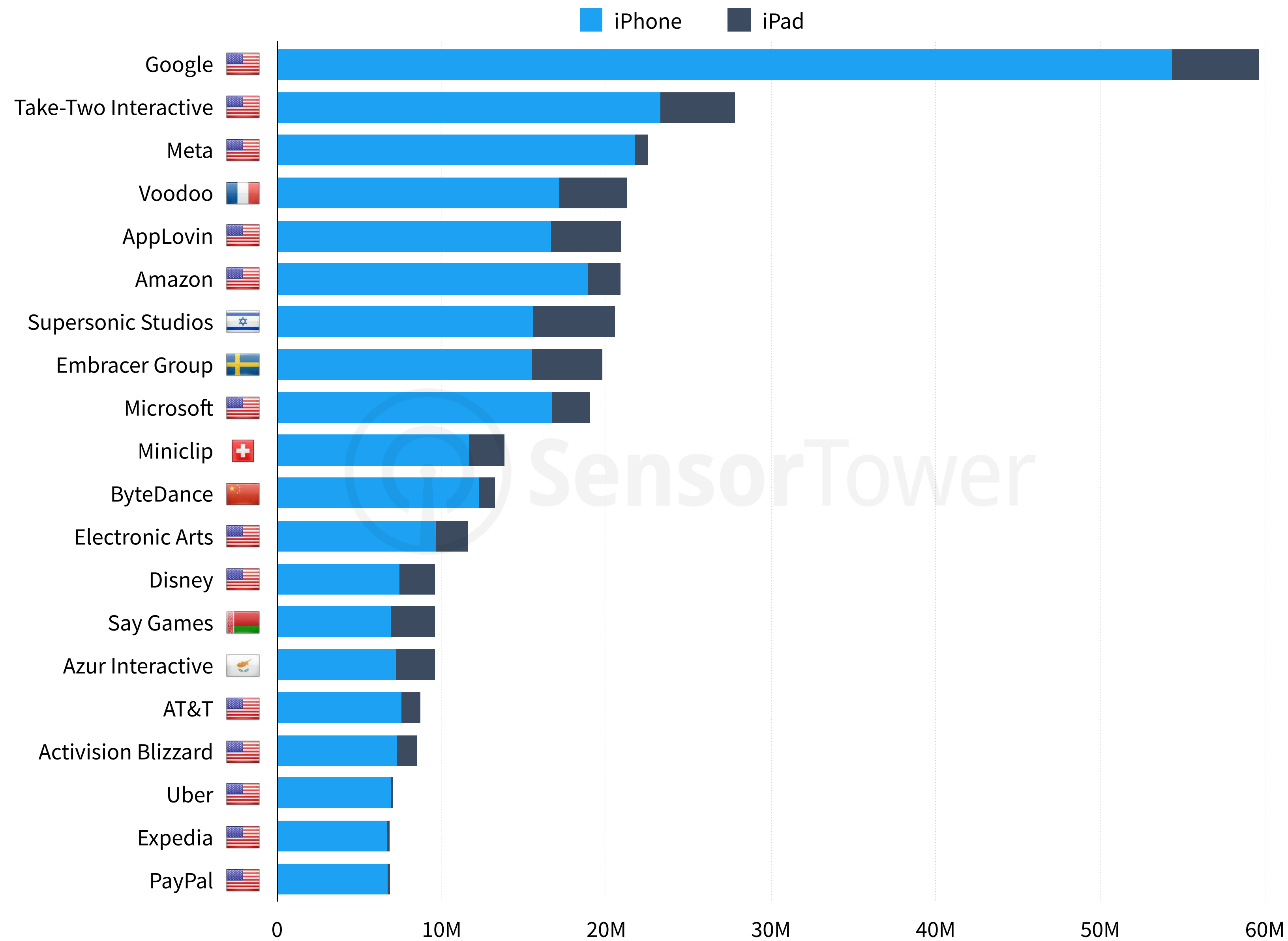
Google was the top publisher in the U.S. on both the App Store and Google Play. It had nearly 60 million downloads on the App Store, and added another 25 million on Google Play.

Take-Two Interactive moved into the top two spot in the U.S. following its acquisition of Zynga earlier this year. No games studio had more downloads in the U.S. in Q2 2022.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Apr. 1 through Jun. 30, 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 - United States



Top Publishers by U.S. Downloads

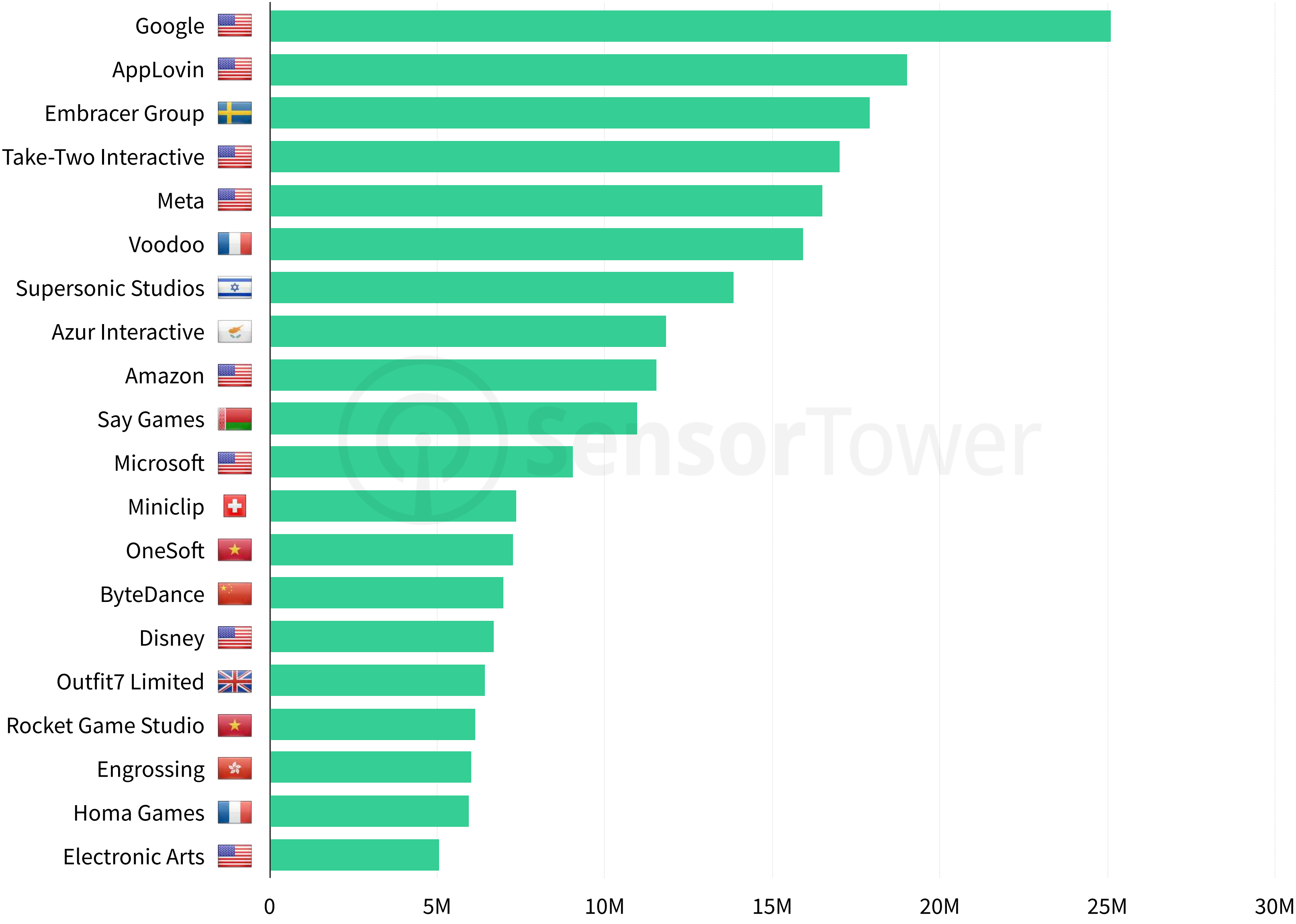
Google had more than double the App Store downloads of the No. 2 publisher, Take-Two Interactive. It had 22 different apps with at least a million App Store downloads in the U.S. in Q2 2022. For comparison, Meta only had four apps above that threshold.

Many of the top publishers by U.S. downloads were also based in the United States, including each of the top three. The U.S. had 13 of the top 20 publishers, while no other country had more than one.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Apr. 1 through Jun. 30, 2022. Apple apps are excluded. We report unique installs only (one download per User).

Google Play - United States



Top Publishers by U.S. Downloads

Google, AppLovin, and Embracer Group were the top three publishers by U.S. downloads on Google Play in Q2 2022. These apps were also the top three last quarter, though AppLovin passed Embracer Group to take the No. 2 spot.

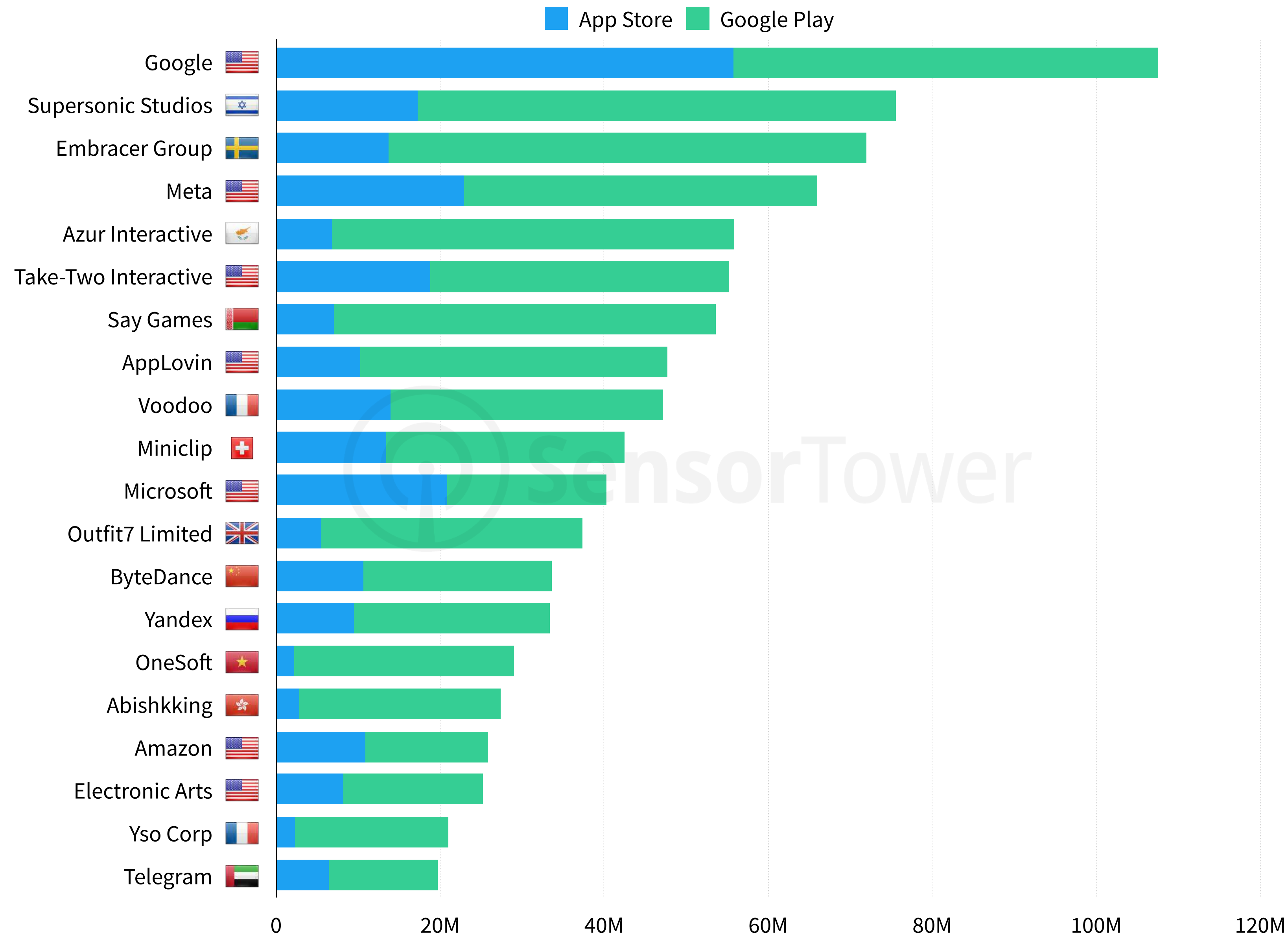
Electronic Arts reached the top 20 this quarter following 16 percent year-over-year growth on Google Play. Electronic Arts had seen installs decline consistently in the U.S. in recent years and this was the first quarter of positive Y/Y growth since back in 2016. This turnaround was the result of Apex Legends Mobile which contributed 22 percent of the publisher’s Google Play installs in the U.S. in its first quarter.

Note Regarding Download Estimates

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Overall - Europe



Top Publishers by European Downloads

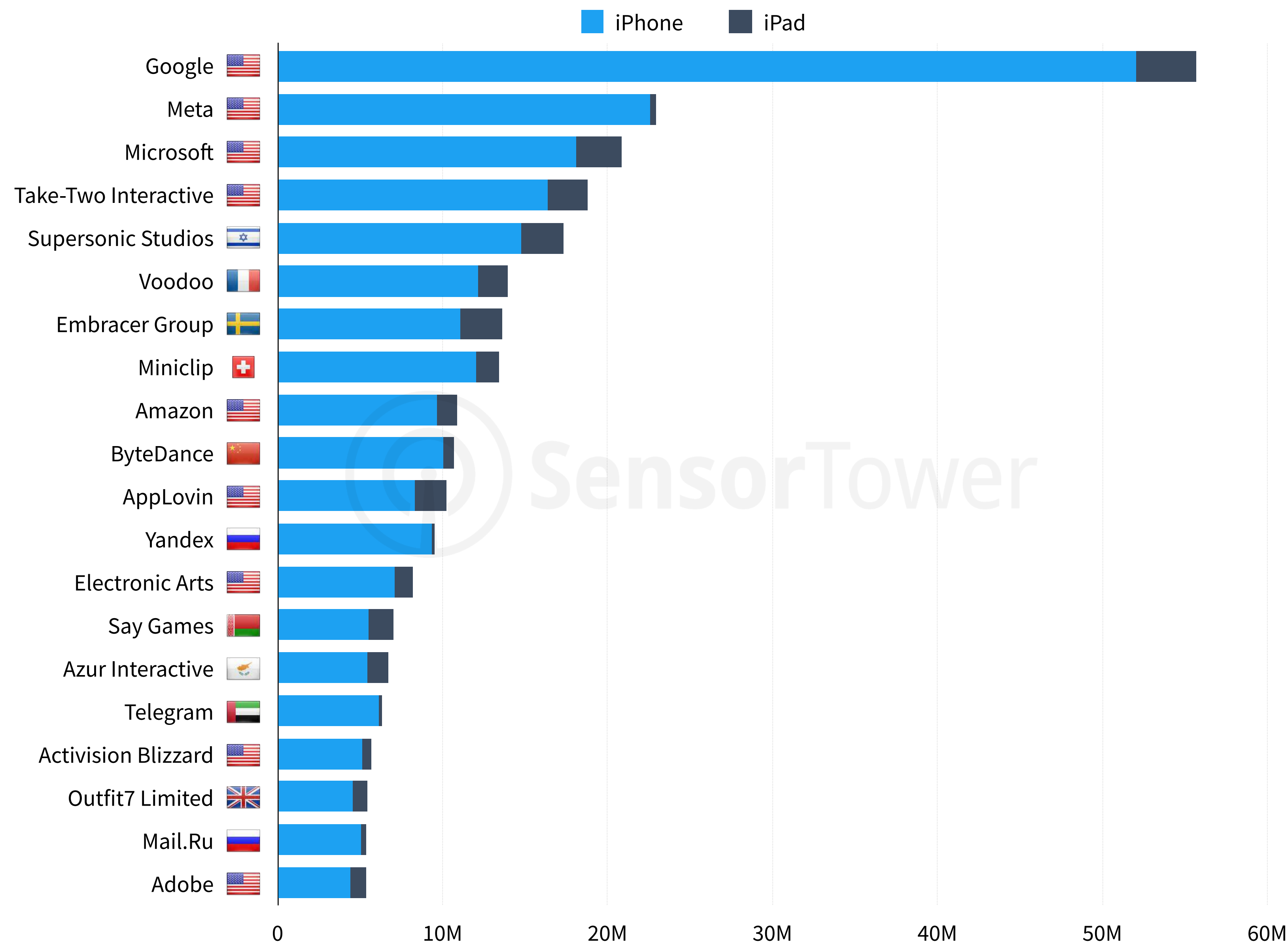
Google continued its reign as the top publisher in Europe with more than 10 different apps surpassing 3 million downloads during the quarter. Google has maintained consistent success due to its diverse portfolio of top apps. Google Maps was its only app to rank among the top 20 in Europe in Q2 2022.

Supersonic Studios entered the top five for the first time ever, moving up from eighth last quarter. The publisher recorded 76 million downloads in Q2 2022. Tall Man Run alone saw more than 10 million downloads.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Apr. 1 through Jun. 30, 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 - Europe



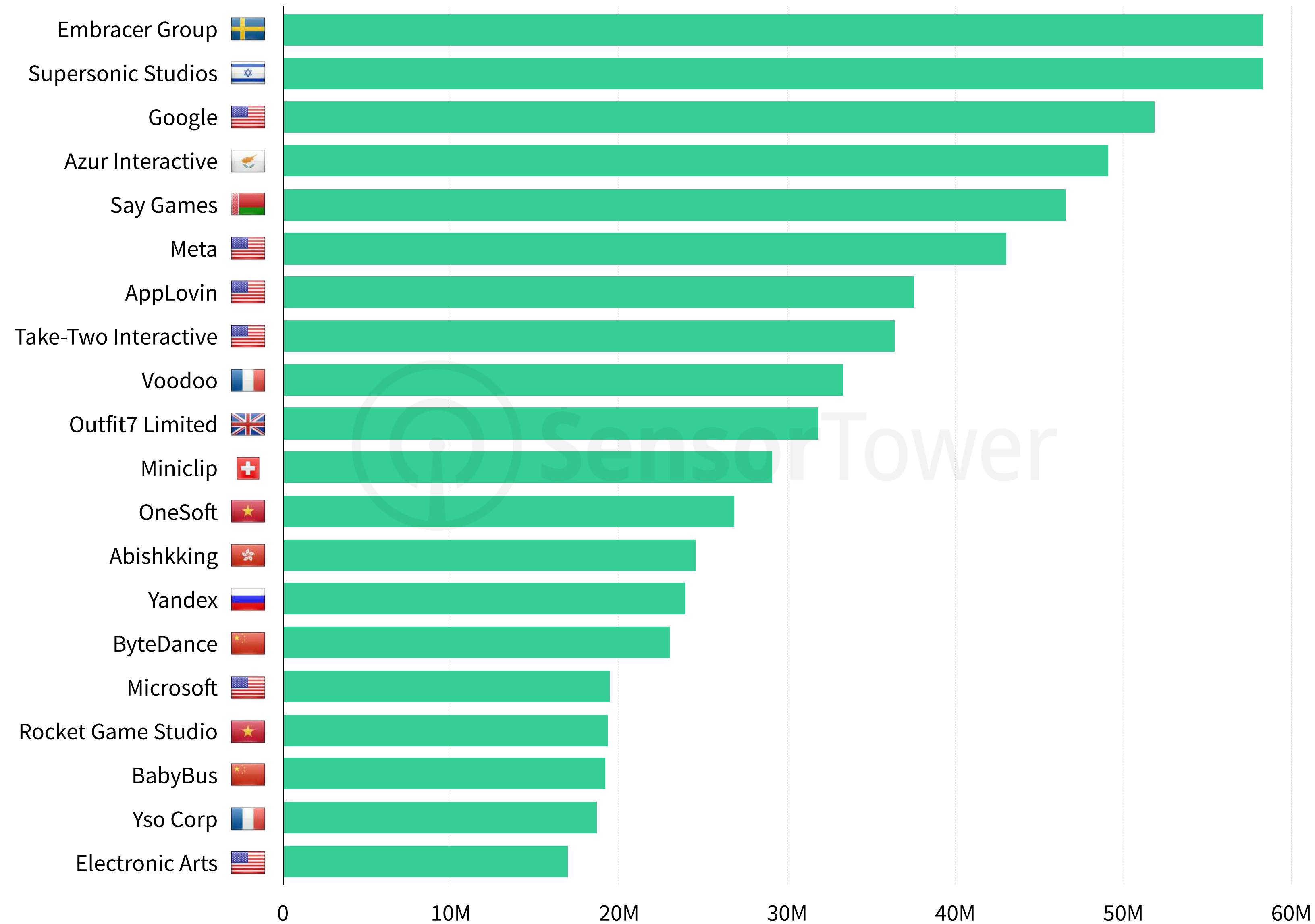
Top Publishers by European Downloads

Google was absolutely dominant on the App Store, recording more than 55 million downloads compared to Meta's 23 million. The U.K., Germany, and France were Google's largest markets in the continent, accounting for more than a third of its European installs.

Three Europe-based publishers ranked among the top 10 in Q2 2022, including Embracer Group (Sweden), Voodoo (France), and Miniclip (Switzerland). The U.S. also had five of the top 10 publishers.

Note Regarding Download Estimates
 Our estimates include worldwide daily download totals for iPhone and iPad for Apr. 1 through Jun. 30, 2022. Apple apps are excluded. We report unique installs only (one download per User).

Google Play - Europe



Top Publishers by European Downloads

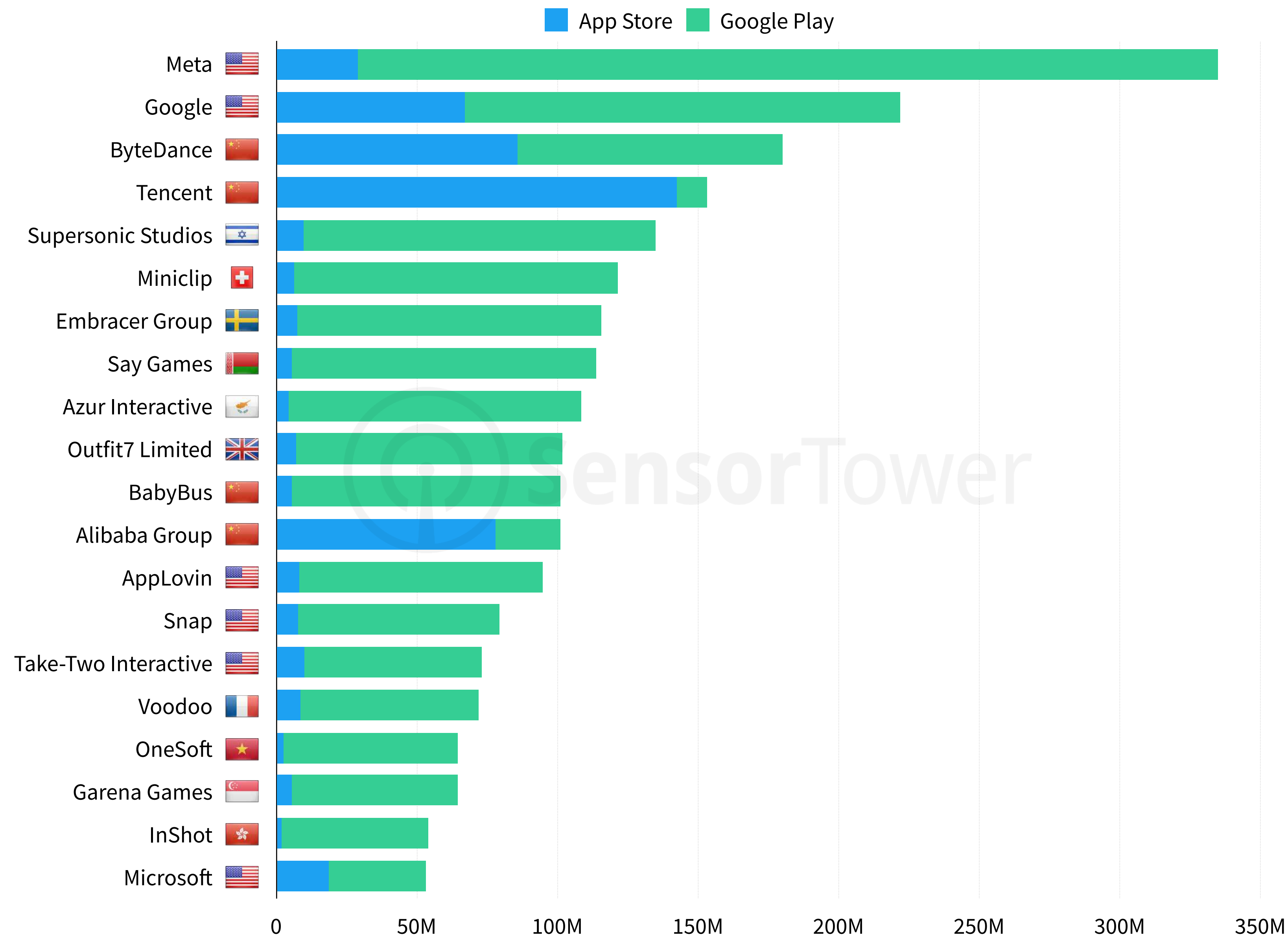
Embracer Group edged out Supersonic Studios to hold its position as the top publisher in Europe on Google Play. The owner of hypercasual publishers like CrazyLabs and TabTale, Embracer Group had **15 different apps surpass one million downloads in Q2 2022.**

Supersonic Studios closed the quarter neck-and-neck with Embracer Group. Mobile games publishers performed particularly well on Google Play in Europe, with eight of the top 10 publishers primarily focusing on games.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for Google Play for Apr. 1 through Jun. 30, 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

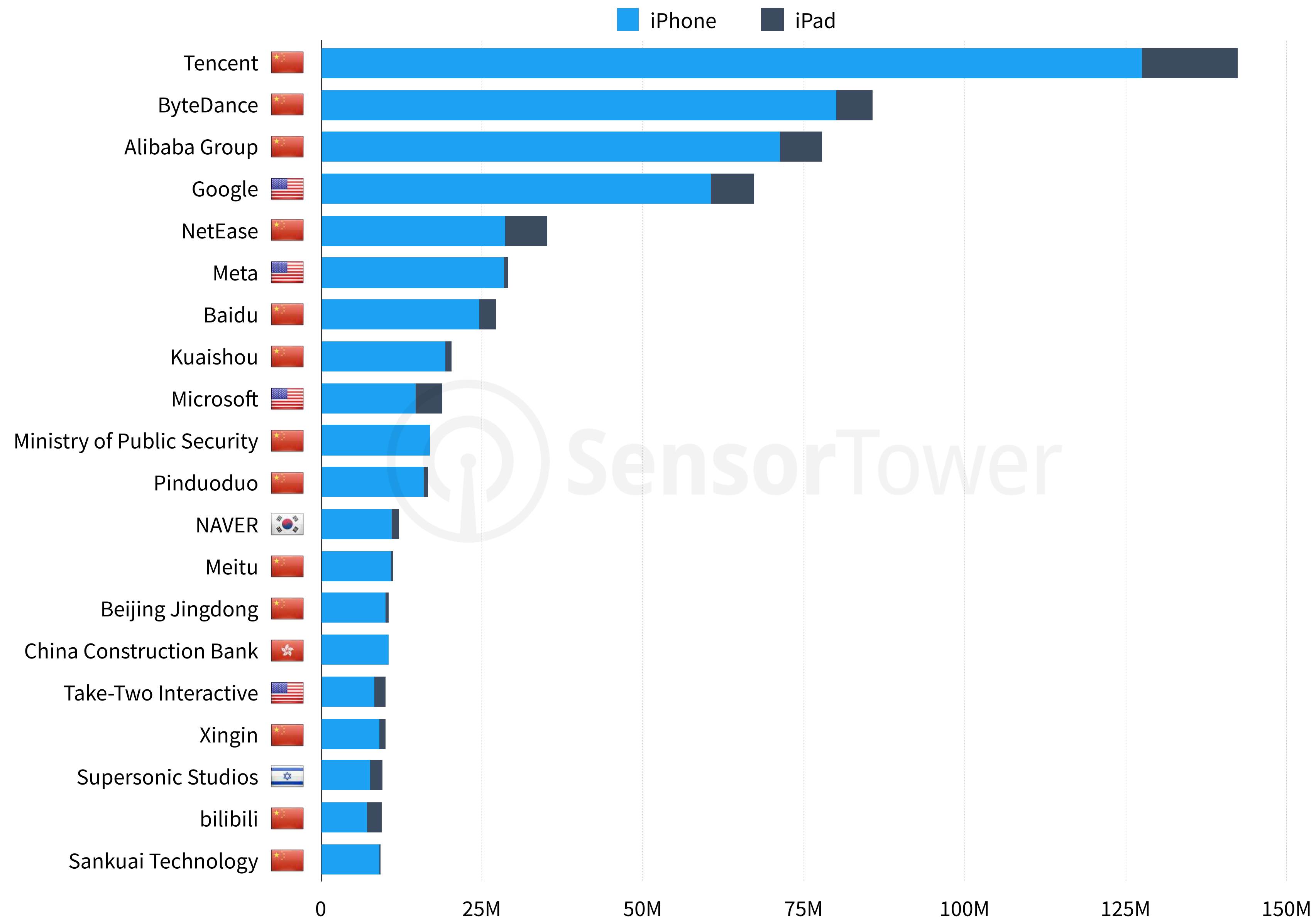
Meta reached 300 million installs in Asia for the fifth straight quarter. It was particularly popular in Asia, which contributed 175 million downloads by itself. Instagram was Meta’s top app in Q2 2022 with nearly 30 percent of the publisher’s installs, followed by Facebook and WhatsApp.

Supersonic Studios entered the top five with its installs in Asia climbing 50 percent during the quarter, the highest growth among top publishers in the region. Bridge Race drove most of the uplift, growing by more than 15 million downloads quarter-over-quarter.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Apr. 1 through Jun. 30, 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 - Asia



Top Publishers by Asia Downloads

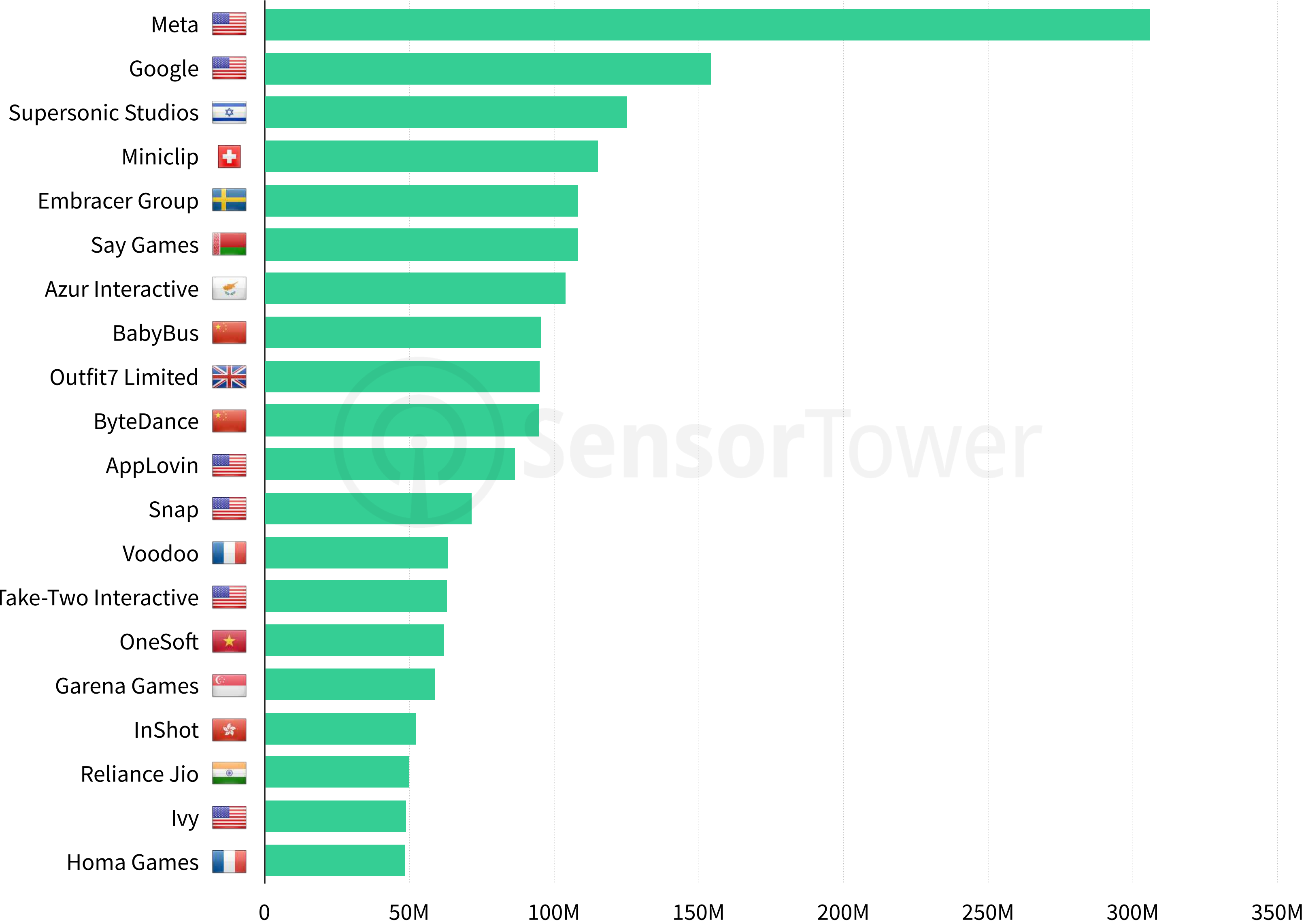
China's Tencent surpassed 140 million App Store installs in Asia in Q2 2022. Video conferencing app VooV Meeting overtook WeChat as the publisher's most downloaded App Store app in the quarter. The app saw its adoption climb over 45 percent quarter-over-quarter to over 20 million, as demand for such apps surged due to concerns about COVID-19 in China.

China remains the key market for the App Store in Asia, contributing 55 percent of the downloads in the region. **More than half of the top publishers in Asia were based in China Mainland.**

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Apr. 1 through Jun. 30, 2022. Apple apps are excluded. We report unique installs only (one download per User).

Google Play - Asia



Top Publishers by Asia Downloads

Meta surpassed 300 million Google Play downloads in Asia for the first time since Q1 2020. The publisher is in a good position to surpass a billion downloads again in 2022, having recorded more than 570 million installs already in the first two quarters.

Supersonic Studios climbed seven positions since Q1 2022 to No. 3 on Google Play. The publisher surpassed 125 million downloads, growing nearly 60 percent quarter-over-quarter. India accounted for more than 50 percent of its downloads, followed by Indonesia at 13 percent.

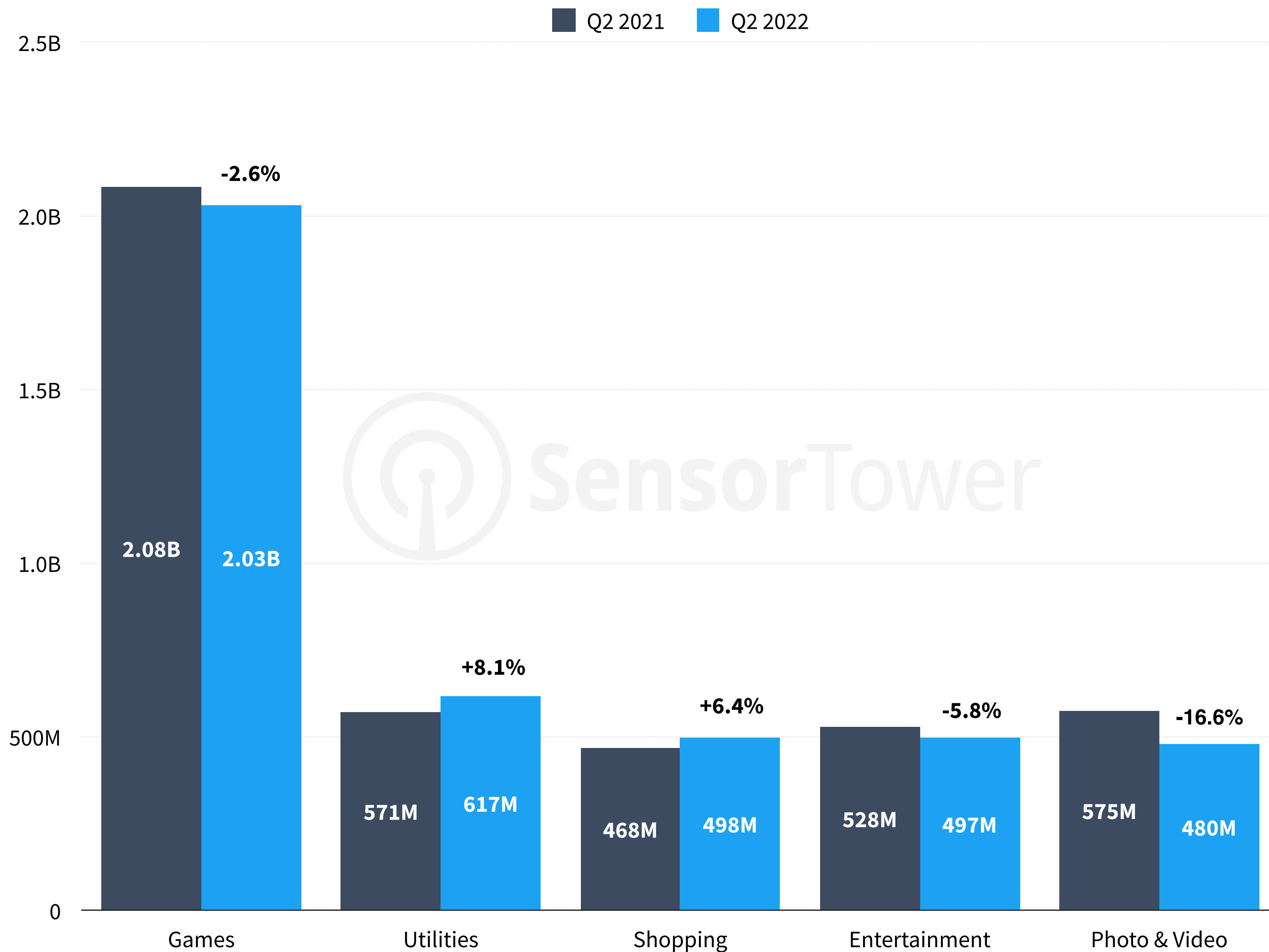
Note Regarding Download Estimates

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Top Categories

Top Categories by Downloads in Q2 2022

App Store



Top Categories by Worldwide Downloads

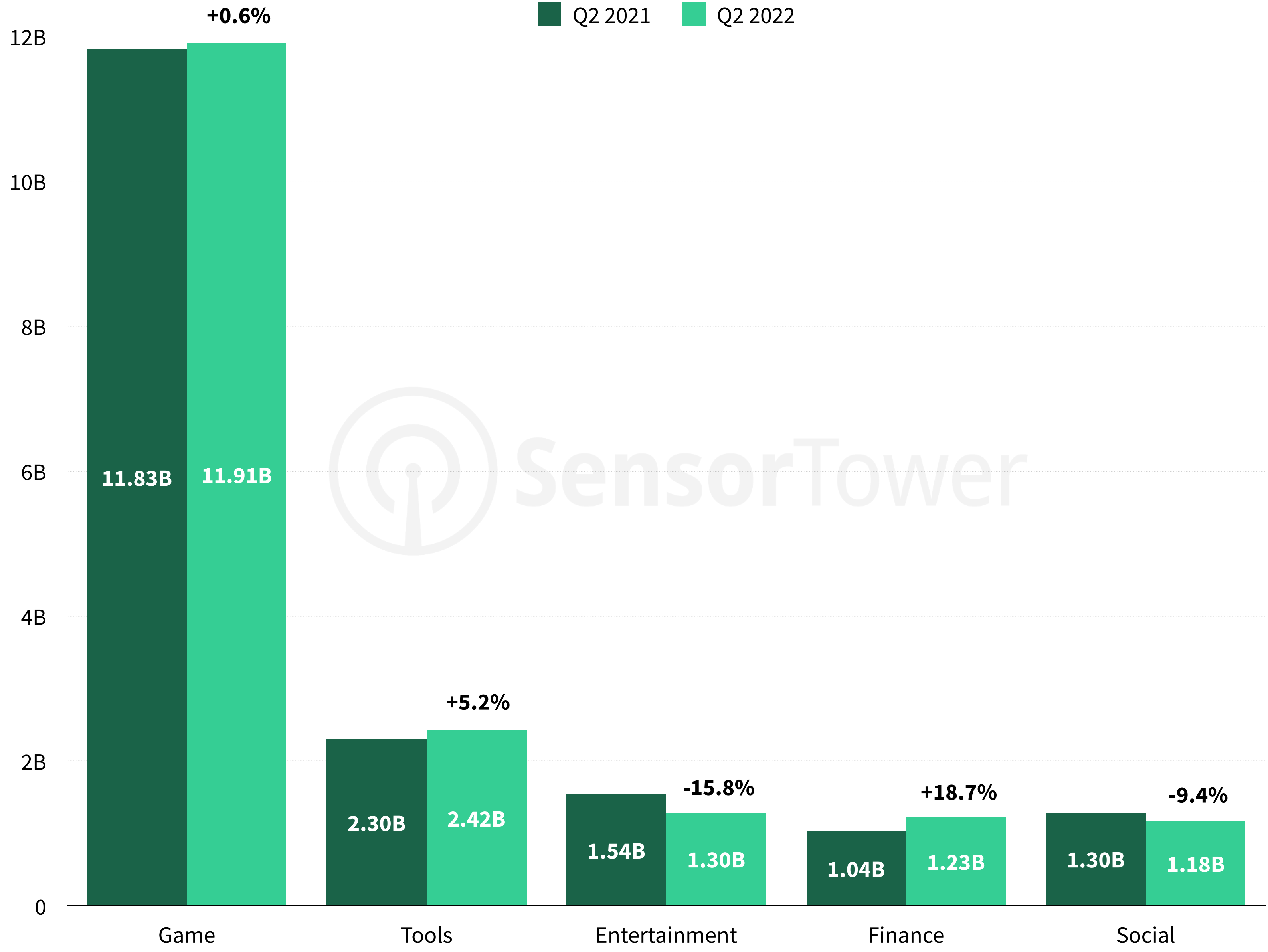
Following a spike in interest in mobile gaming at the start of the COVID-19 pandemic, downloads on the App Store have fallen back to pre-pandemic levels. Mobile game downloads have hovered just above 2 billion in each of the past five quarters.

Excluding games, other categories saw a slight increase quarter-over-quarter with installs up 0.3 percent. Utilities and Shopping were two of the fastest growing categories last quarter, while Entertainment and Photo & Video continued to decline following a surge in interest in 2020 at the beginning of the pandemic.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Apr. 1 through Jun. 30, 2022. Apple apps are excluded. We report unique installs only (one download per User).

Google Play



Top Categories by Worldwide Downloads

Unlike on the App Store, mobile game downloads increased year-over-year on Google Play to 11.9 billion. While this was a little below the peak of 12.4 billion seen in Q2 2020, mobile games publishers have done a good job of retaining the gains seen at the start of COVID-19.

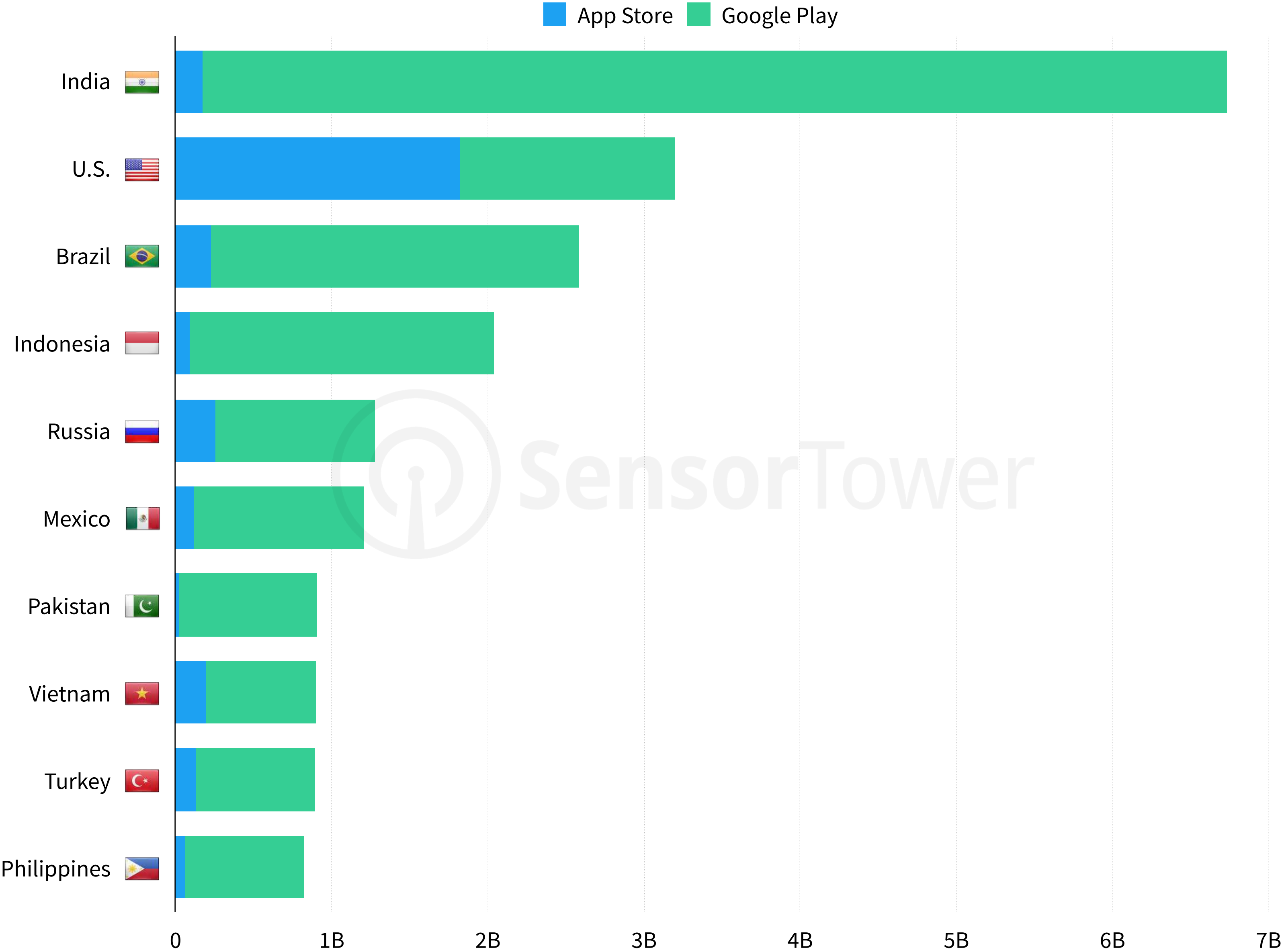
The Finance category had more installs than Social in Q2 2022, a massive change from recent years. Social had more than the double the downloads of Finance as recently as Q4 2018.

Note Regarding Download Estimates
 Our estimates include worldwide daily download totals for Google Play for Apr. 1 through Jun. 30, 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 Markets

—
Top Markets by Downloads in Q2 2022

Overall



Top Markets by Downloads

Indonesia reached 2 billion downloads in a quarter for this first time in Q2 2022, joining India, the U.S., and Brazil as the only countries to reach this threshold. China has also surpassed this on the App Store alone, but it has been excluded from this chart since Google Play is not available there.

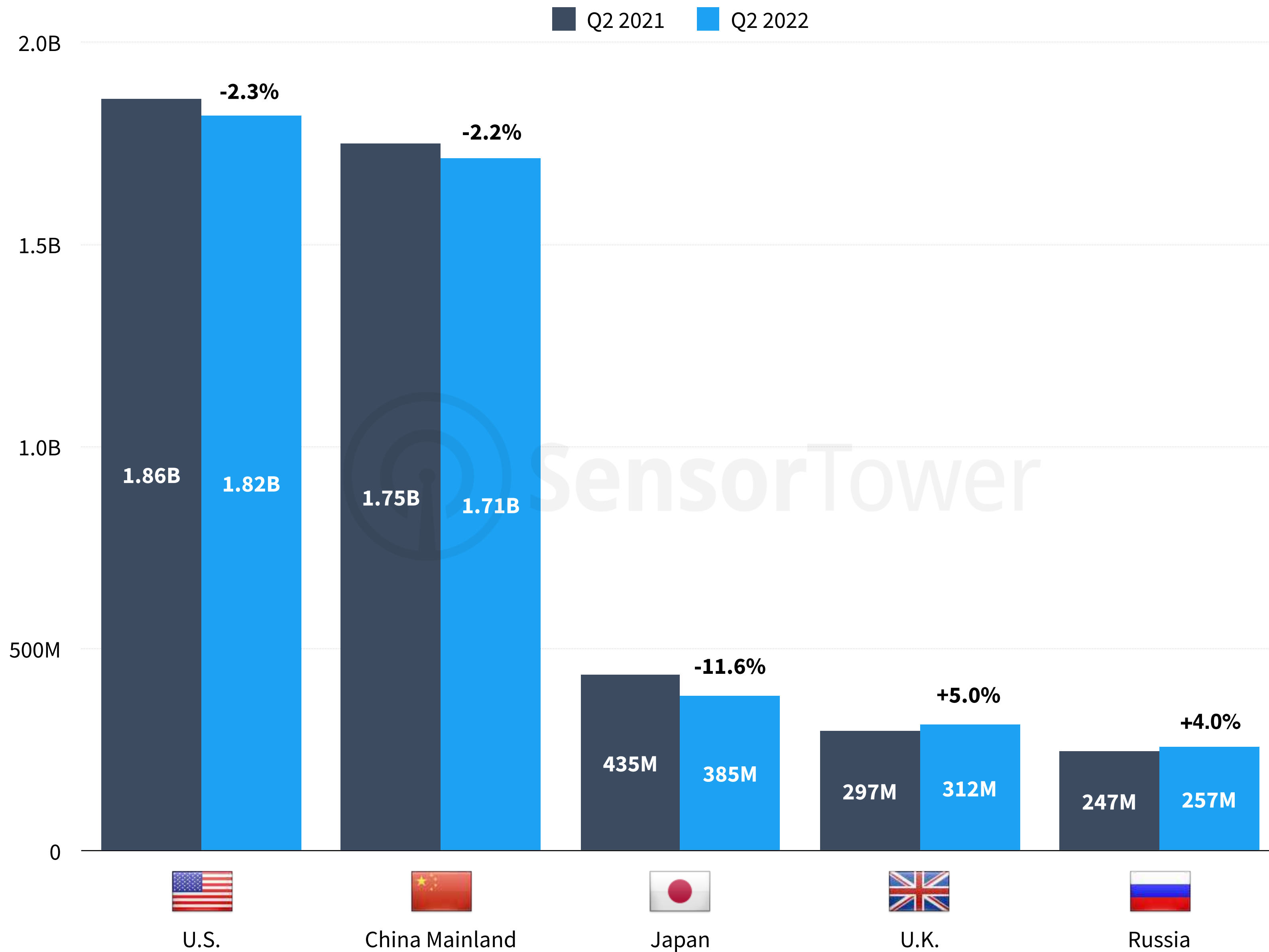
Pakistan was the seventh largest market in Q2 2022, up from ninth last quarter and its highest ranking yet. None of the top 10 markets saw higher year-over-year growth than Pakistan's at 11 percent.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Apr. 1 through Jun. 30, 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 it from this chart.

App Store



Top Markets by Downloads

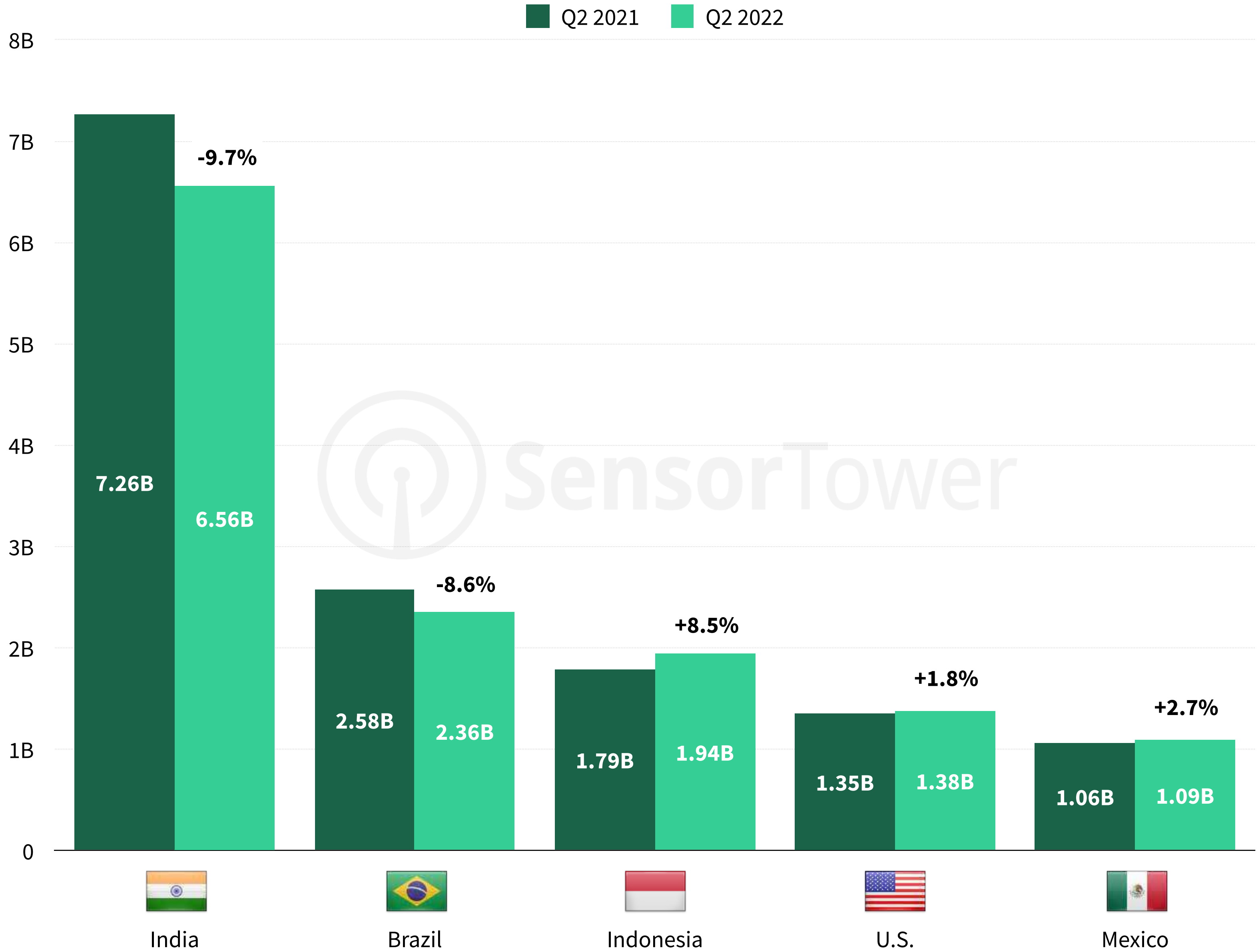
The U.S. and China remain far-and-away the largest markets for the App Store, combining for 45 percent of all downloads on the platform in Q2 2022. However, both saw modest year-over-year declines in downloads.

Many of the top markets saw installs tick downwards in recent years after the big spike in installs at the start of the COVID-19 pandemic. This makes the positive growth in the U.K. and Russia particularly notable, though downloads in both countries are still below Q2 2020 totals.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Apr. 1 through Jun. 30, 2022. Apple apps are excluded. We report unique installs only (one download per User).

Google Play



Top Markets by Downloads

Although India’s downloads declined nearly 10 percent year-over-year, it still surpassed 6 million for the ninth straight quarter. Downloads in Q2 2022 were still up 26 percent compared to Q2 2019, before the pandemic.

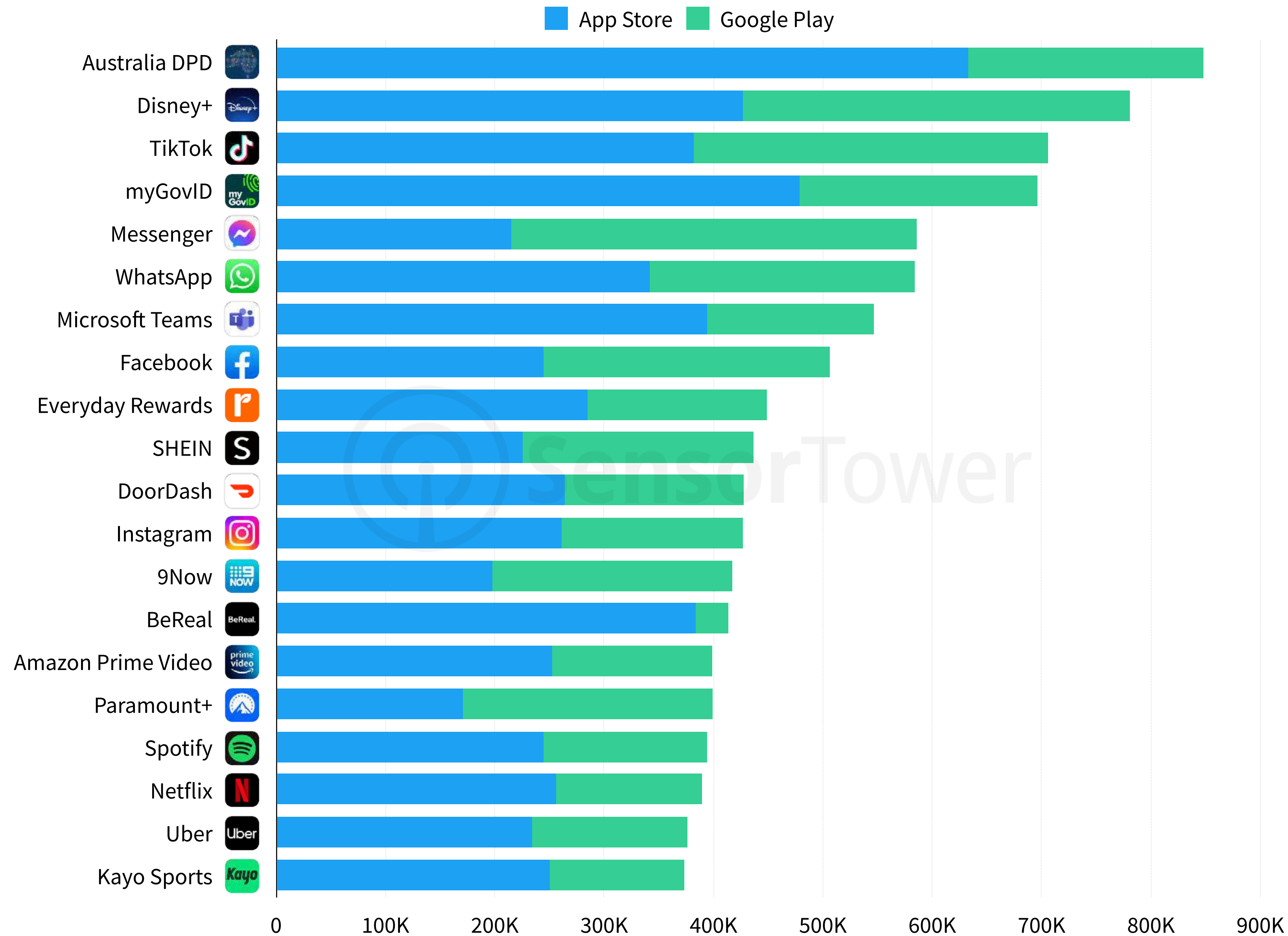
Indonesia had a huge quarter for mobile app adoption, with downloads up more than 8 percent quarter-over-quarter. If recent trends continue, it could overtake Brazil as the second largest market in the coming years. Indonesia narrowed the gap to Brazil to a little over 400 million downloads in Q2 2022, down from nearly 800 million a year prior.

Note Regarding Download Estimates
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Spotlight on Australia

The Latest Mobile Trends in Australia

Apps - Australia



Top Apps by Australian Downloads

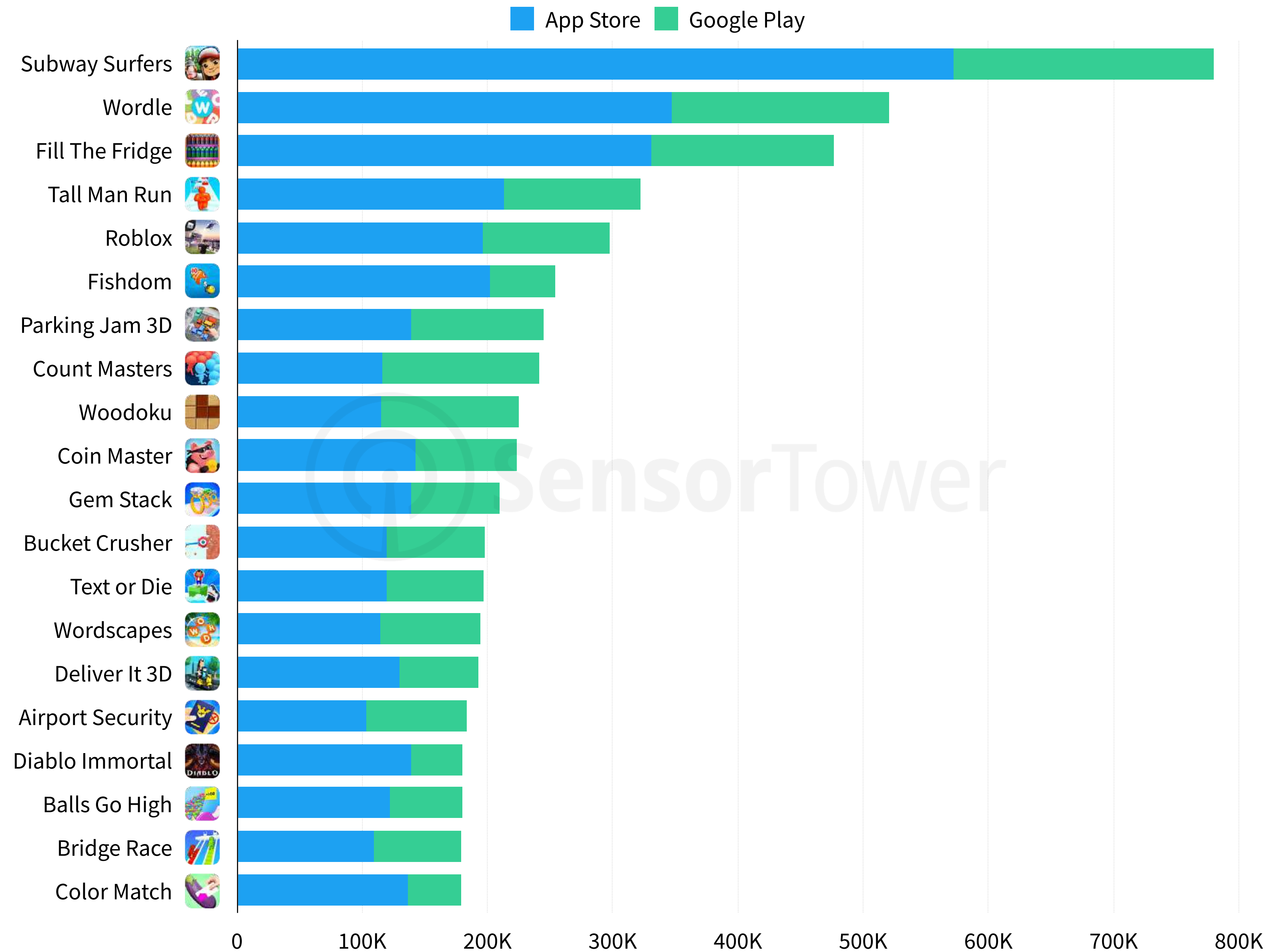
Australia’s top apps in Q2 2022 point to the country opening back up—and the continued caution in response to the coronavirus. Australia DPD (Digital Passenger Declaration) was required for those traveling into Australia to share vaccination and medical status. However, Australia’s border requirement changed on July 6, 2022 to no longer provide evidence of vaccination status and the Australia DPD app was removed from the app stores.

Disney+ was the No. 2 app in Australia with its downloads up 44 percent year-over-year, its best quarter in the country since Q2 2020. Other video streaming apps reached the top 20, including 9Now, Amazon Prime Video, Paramount+, and Netflix.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Apr. 1 through Jun. 30, 2022. Apple apps and Google pre-installed apps are excluded. We report unique installs only. Android estimates do not include third-party stores. Figures represent aggregate installs of all app versions, ex: Facebook and Facebook Lite.

Games - Australia



Top Games by Australian Downloads

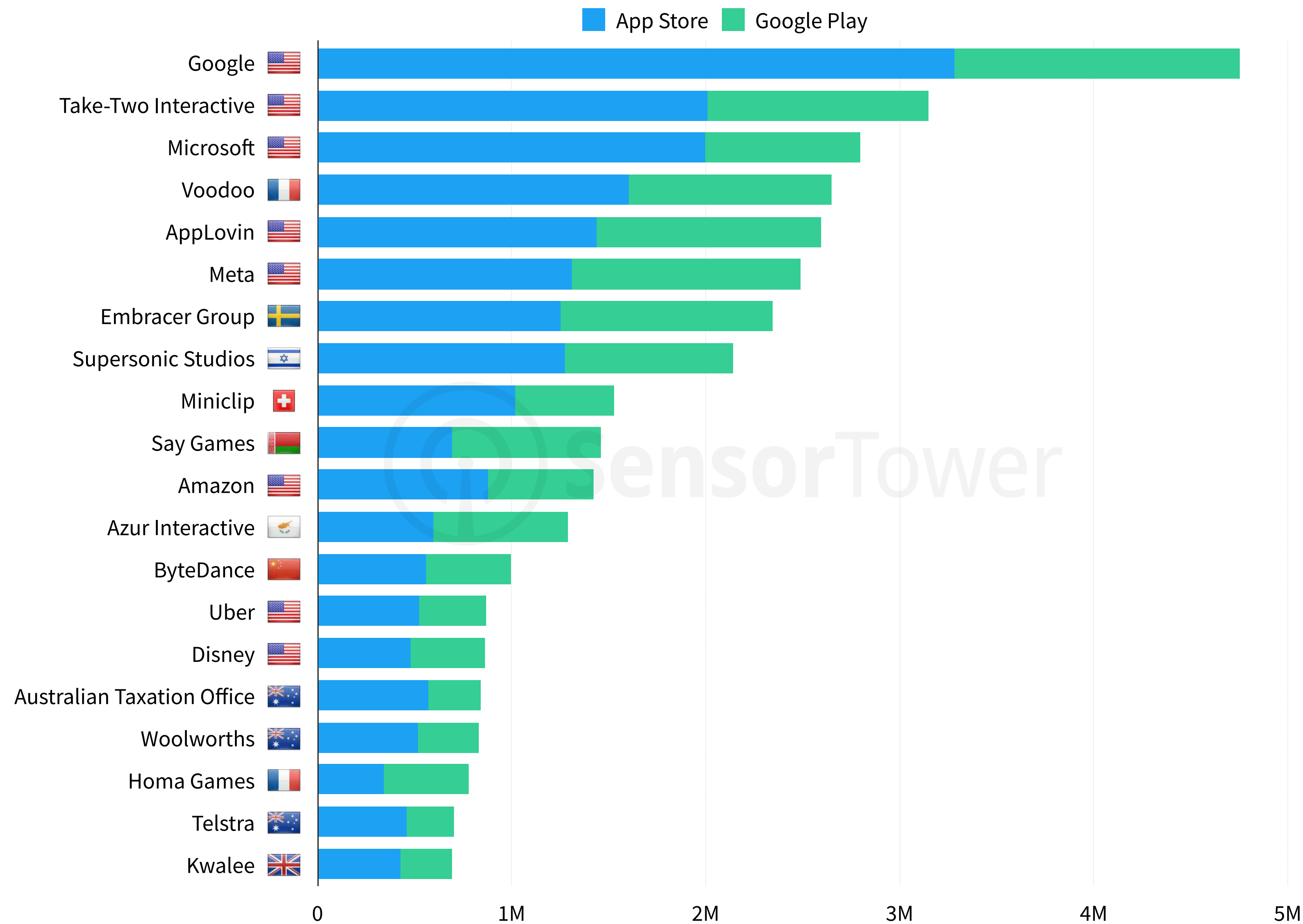
Subway Surfers was the top mobile game in Australia in addition to other markets like the U.S. and Europe. Its downloads more than doubled quarter-over-quarter, and its 572 million downloads on the App Store alone was more than any other game across both platforms.

Wordle held strong in Australia after topping the charts last quarter. The game rode the hype created by the unrelated web-based Wordle game last quarter before being acquired by AppLovin’s Lion Studios.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Apr. 1 through Jun. 30, 2022. Apple apps and Google pre-installed apps are excluded. We report unique installs only. Android estimates do not include third-party stores. Figures represent aggregate installs of all app versions, ex: Facebook and Facebook Lite.

Publishers - Australia



Top Publishers by Australian Downloads

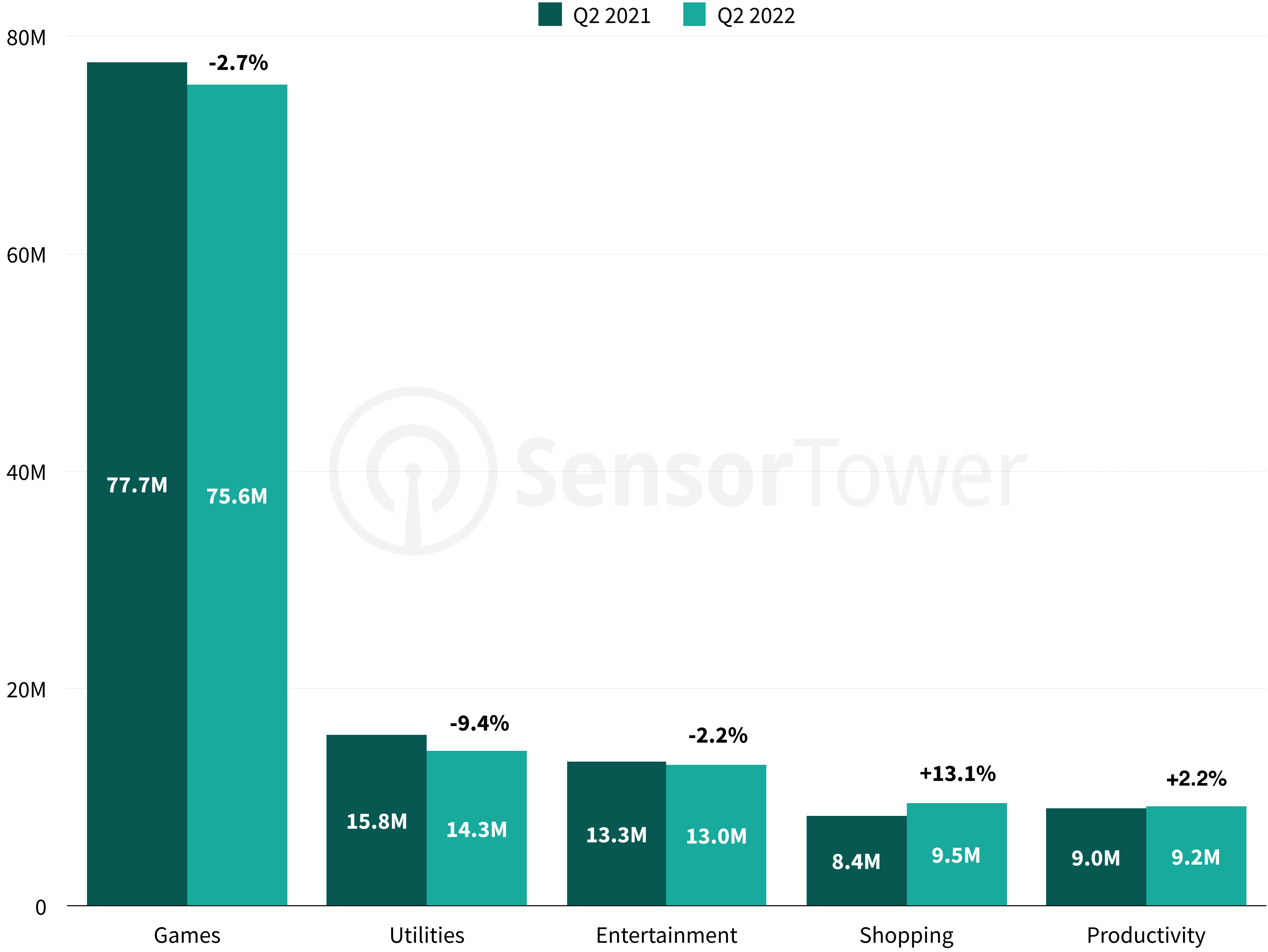
Google was once again the top publisher in Australia, well ahead of any other publisher. Take-Two Interactive moved into the No. 2 spot with its best quarter in Australia since Q2 2020.

Hypercasual games publisher Voodoo was the only publisher in the top five not based in the U.S. Most of the top publishers were from outside of the Australia, though three locally based publishers ranked among the top 20.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Apr. 1 through Jun. 30, 2022. Apple apps and Google pre-installed apps are excluded. We report unique installs only. Android estimates do not include third-party stores.

Categories - Australia



Top Categories by Australian Downloads

Overall, downloads in Australia have started to level out around 200 million per quarter after seeing more than 240 million in Q2 2020 due to high demand during COVID-19. Games and non-games showed a similar trend. Game installs were down 2.7 percent year-over-year, while non-games saw a decline of 2.2 percent.

Among the top categories, Shopping was the only one with double-digit year-over-year growth in Q2 2022. Everyday Rewards from Woolworths was the top Shopping app this quarter after seeing its installs nearly double quarter-over-quarter.

Note Regarding Download Estimates
 Our estimates include worldwide daily download totals for iPhone and iPad for Apr. 1 through Jun. 30, 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. U.S. Consumers Shift Spend to Non-Games

Recent trends suggest that mobile has expanded far beyond games in the U.S. and that other categories hold the future for growth.



2. Subway Surfers was a Global Success in Q2

Subway Surfers, the top mobile game by downloads since 2014, was also the top game in Q2 2022 with high adoption across all regions.



3. The Summer Holidays are Back

Demand for travel and event ticket apps are higher than ever as the world opens up following the COVID-19 pandemic.

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Stories of the Quarter:

1. U.S. Consumers Shift Spending to Non-Games

The U.S. mobile app market has continued to shift dramatically in the years following the outbreak of the COVID-19 pandemic. While spend in mobile games has slowed, the rapid ascent of spending in non-games points to the huge potential still available on mobile.

- **U.S. revenue declined year-over-year for the first time in May 2022 as the market corrected to the atypically high spend seen in the early months of the pandemic.**
- **More than half of U.S. App Store spending now comes from non-games.** The mobile market has changed drastically from the early days when consumers were less willing to spend on subscriptions or other in-app purchases outside of gaming.
- **The growing subscription market has helped apps across the spectrum, not just the biggest players.** 400 apps had more than \$1 million in consumer spending on the U.S. App Store in Q2 2022, eight times the total that reached that number in Q2 2016.



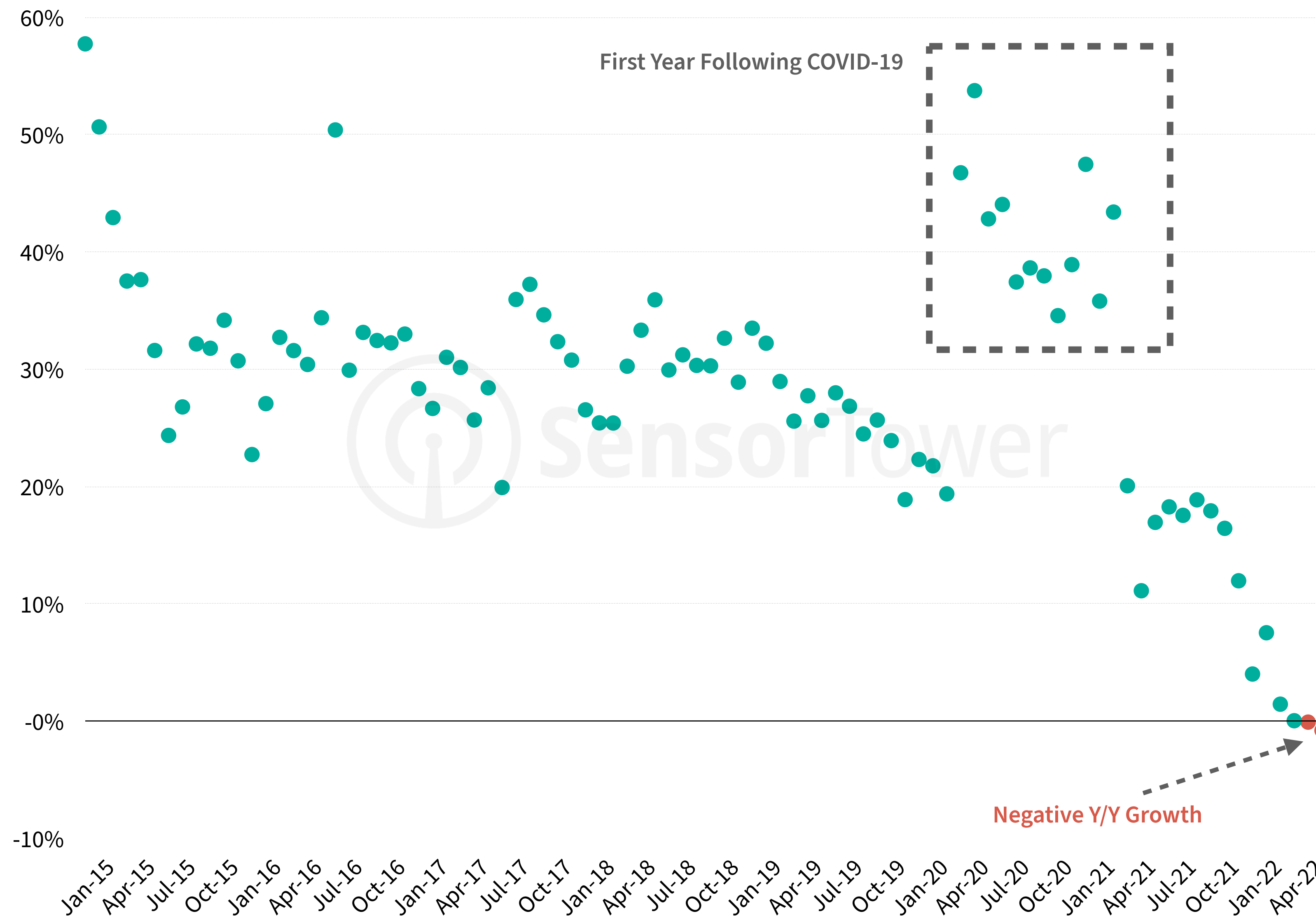
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U.S. App Spending Declined for the First Time in Q2 2022

Year-over-Year Growth for U.S. Mobile App Consumer Spending



U.S. Consumer Spending Y/Y Growth

U.S. consumer spending spiked in April 2020 at the start of the COVID-19 pandemic. Year-over-year growth jumped from around 20 to 30 percent in 2019 to 35 to 55 percent for the next 12 months.

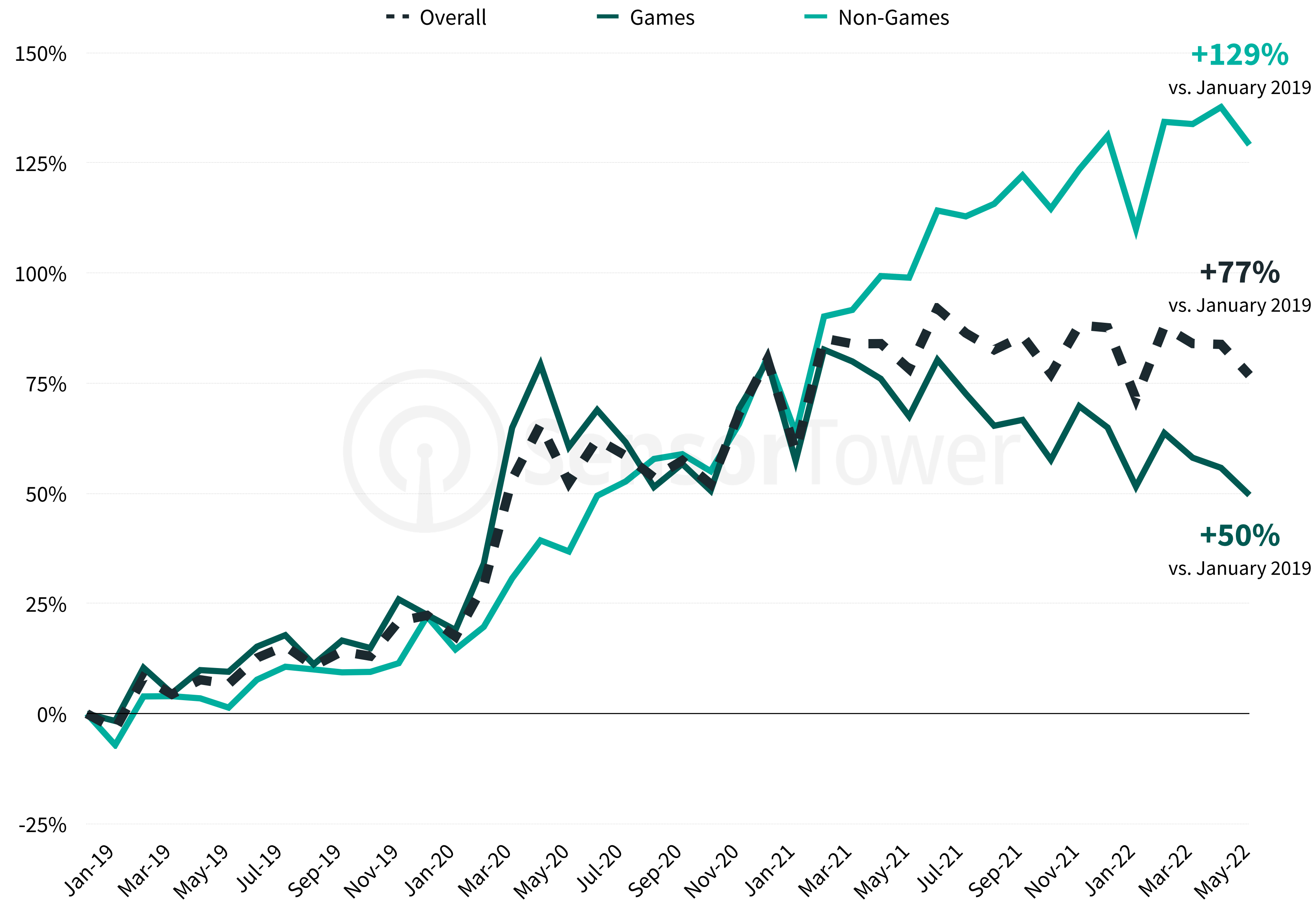
After consumer spending had experienced strong positive growth going back at least as far as 2015, **U.S. spending declined year-over-year for the first time in May 2022.** Following the huge spike mobile spend in 2020, consumers have started to shift their spending back towards other activities like travel and restaurant dining. It's worth noting that consumer spending in Q2 2022 was still up 71 percent compared to Q2 2019 before the pandemic.

Note Regarding Consumer Spending Estimates

Our estimates include worldwide revenue for iPhone, iPad, and Google Play for Jan. 1, 2015 through Jun. 30, 2022. We report gross revenue (including the cut for Apple or Google). Android estimates do not include third-party stores.

Spending Outside of Mobile Games Now Drives U.S. Growth

U.S. Mobile App Consumer Spending Growth for Games vs. Non-Games (Indexed to January 2019)



U.S. Consumer Spending Growth

The subscription model for non-gaming continues to thrive in the U.S. While overall mobile spend in the U.S. has started to slow, spending outside of games has continued to climb rapidly, greatly outpacing the spending growth in mobile games

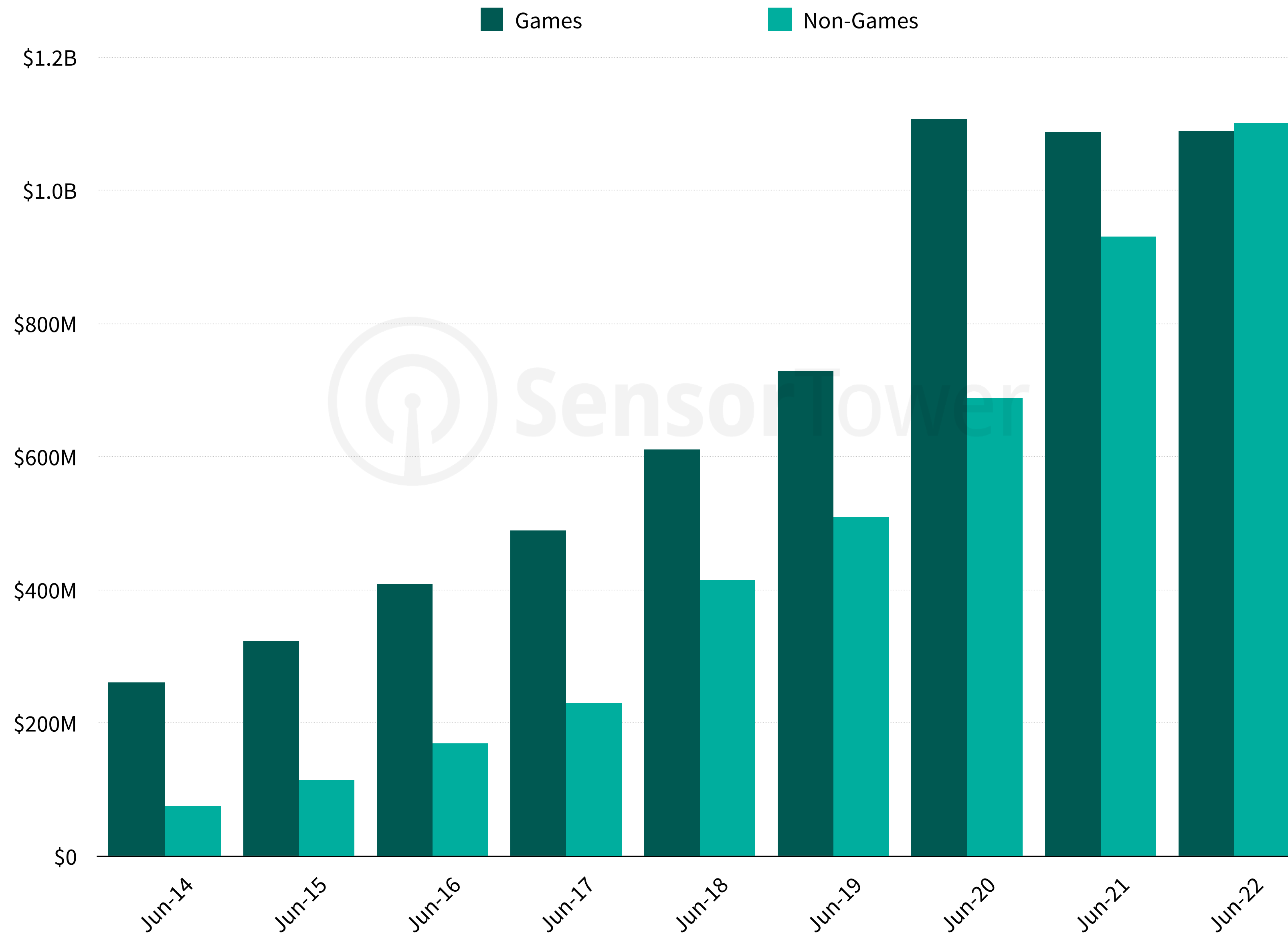
This trend in spending is quite the reversal from a few years ago—mobile game spending growth was consistently higher than in non-games in 2019 and early 2020. Mobile game spending surged at the start of the pandemic, but by late-2020, non-game growth had caught back up before opening up a gap by mid-2021.

Note Regarding Consumer Spending Estimates

Our estimates include worldwide revenue for iPhone, iPad, and Google Play for Jan. 1, 2019 through Jun. 30, 2022. We report gross revenue (including the cut for Apple or Google). Android estimates do not include third-party stores.

Spend in Non-Games Passes Games on the U.S. App Store

U.S. App Store Mobile App Consumer Spending for Games vs. Non-Games in June Each Year

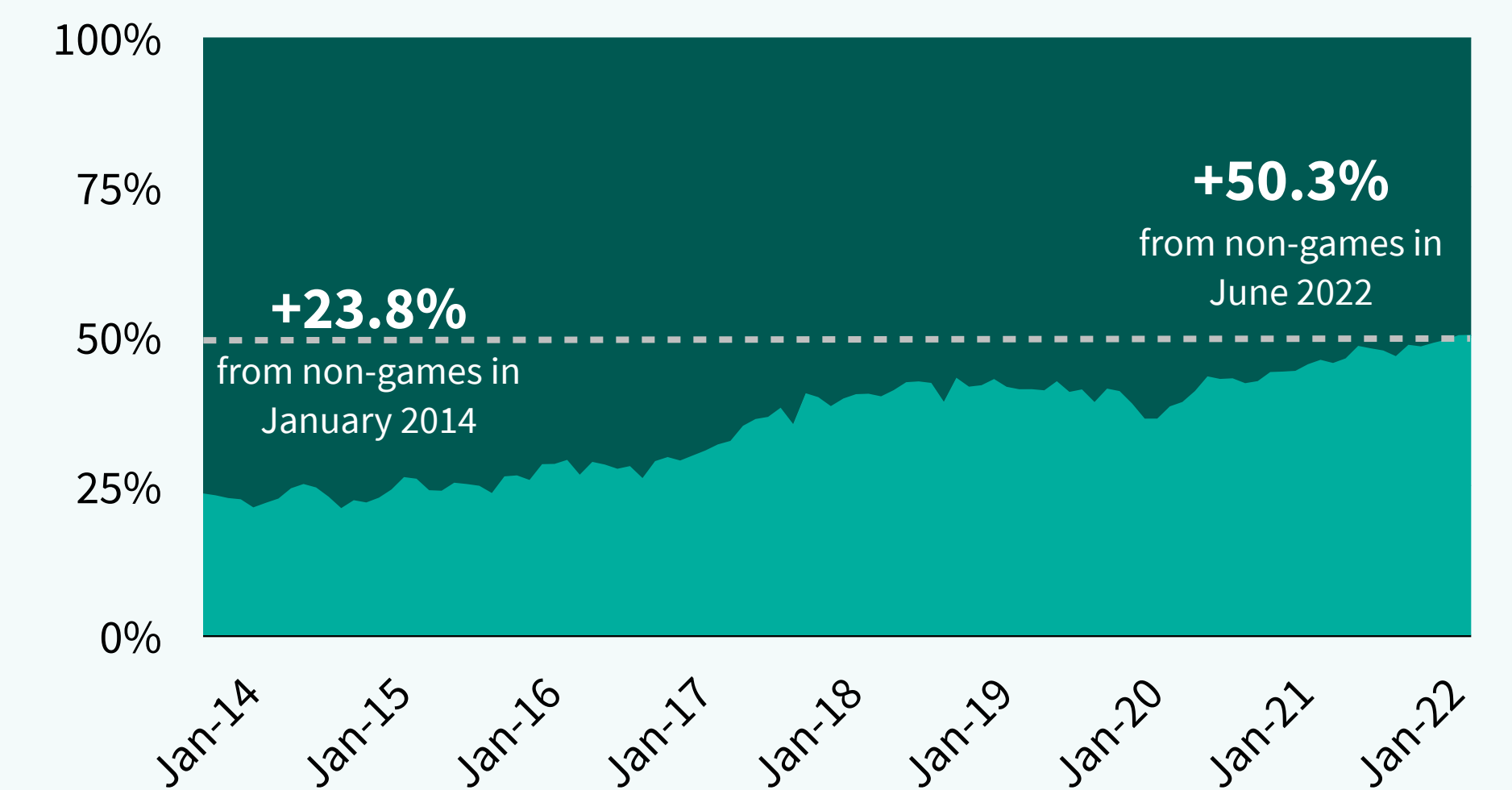


U.S. App Store Consumer Spending

Spending from non-games on the U.S. App Store exceeded that from games for the first time in May 2022. By June, 50.3 percent of spending came from non-games. Five years ago, games accounted for more than two-thirds of total spending on the U.S. App Store.

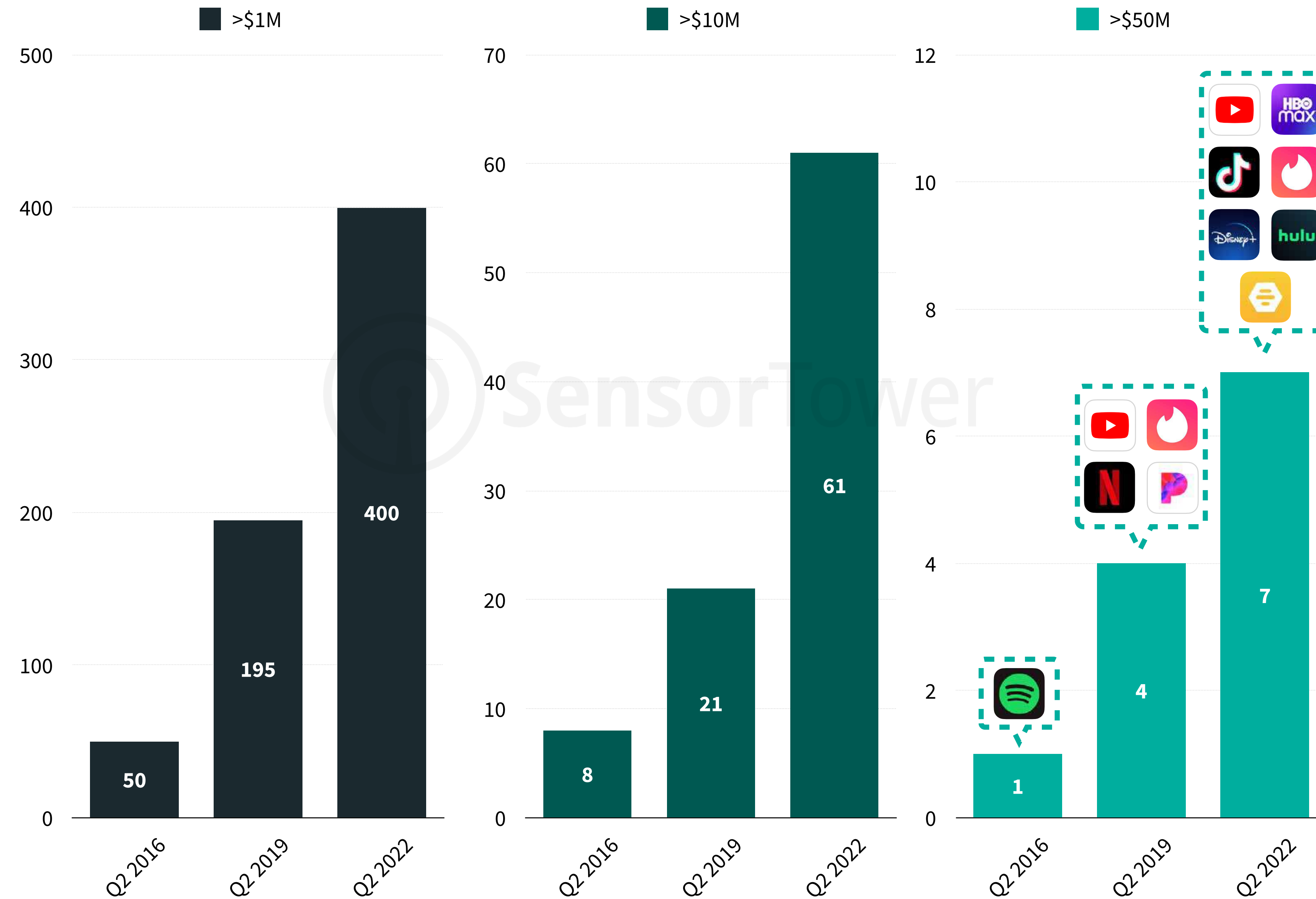
Spending in non-games has grown at more than twice the rate as games, with non-games achieving a compound annual growth rate of 40 percent since June 2014, compared to less than 20 percent for games.

Consumer Spending Market Share for Games vs. Non-Games



Hundreds of Apps Benefit from U.S. Subscription Boom

Number of App Store Apps (Excluding Games) with more than \$1 Million in U.S. Consumer Spending



Number of App Store Apps

The rise of the subscription model on the App Store and the shift in consumers' willingness to make purchases on their phones have helped hundreds of apps find success in the U.S. 400 different apps achieved at least \$1 million in consumer spending in Q2 2022, with the vast majority relying on subscriptions as their primary in-app purchases.

In Q2 2022, 61 App Store apps had at least \$10 million in U.S. consumer spending—more than the number of apps that had \$1 million back in Q2 2016. The growth has been strong across the board, with the number of apps achieving \$50 million in a quarter also rising 7x.

Note Regarding Consumer Spending Estimates

Our estimates include worldwide revenue for iPhone, iPad, and Google Play for Apr. 1, 2016 through Jun. 30, 2022. We report gross revenue (including the cut for Apple or Google). Android estimates do not include third-party stores.

Stories of the Quarter:

2. Subway Surfers was a Global Success in Q2

Miniclip's acquisition of Subway Surfers was a major move in the mobile gaming space due to the title's long-lasting presence as a top game as well as its recent success.

- **Subway Surfers has been the world's most installed mobile game since the start of 2014 with more than 1.8 billion downloads across the App Store and Google Play.**
- **Subway Surfers' success also surged ahead of its acquisition as it became the top mobile game globally by downloads with its highest total since at least 2014 in Q2 2022.** The titles consumer spending also spiked in May.
- **With the acquisition of Subway Surfers, Miniclip adds one of the world's largest titles with a strong presence across the globe.** In Q2 2022, Subway Surfers was the top mobile game by downloads in North America, Europe, and Oceania, and it ranked third in Asia.



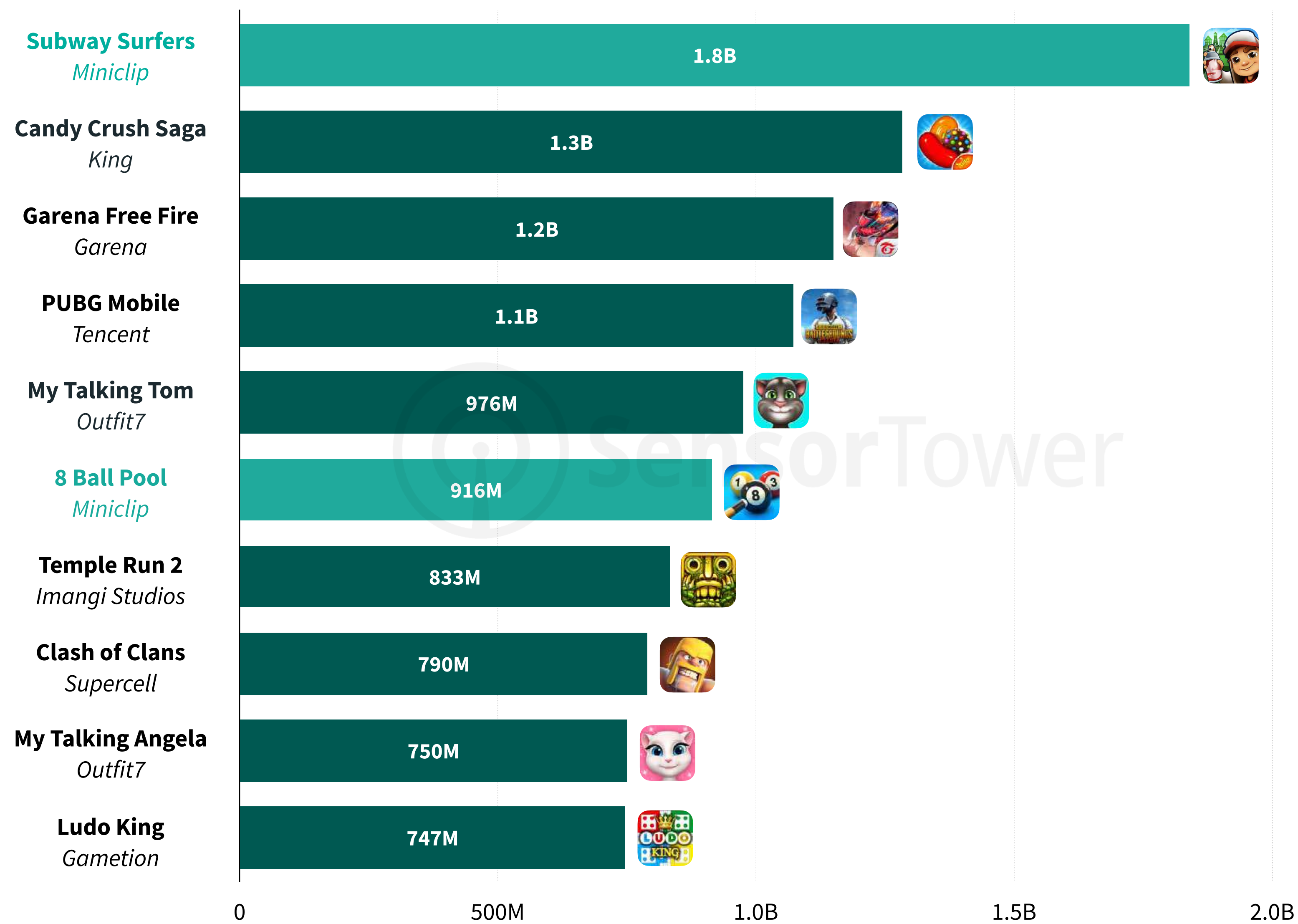
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Miniclip Acquires the World's Most Installed Mobile Game

Worldwide downloads between 2014 and H1 2022, App Store and Google Play



Worldwide Downloads

No mobile game has had more downloads across the App Store and Google Play since 2014 than Subway Surfers with 1.8 billion. This total was more than half a billion ahead of the second game over this period, Candy Crush Saga.

No doubt intrigued by Subway Surfers' long-standing dominance as well as its recent reemergence as the top mobile game, Miniclip acquired publisher Sybo in late June 2022. Miniclip joins Outfit7 as the only publisher with two of the top 10 mobile games by downloads since 2014.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1, 2014 through Jun. 30, 2022. Apple apps and Google pre-installed apps are excluded. We report unique installs only. Android estimates do not include third-party stores.

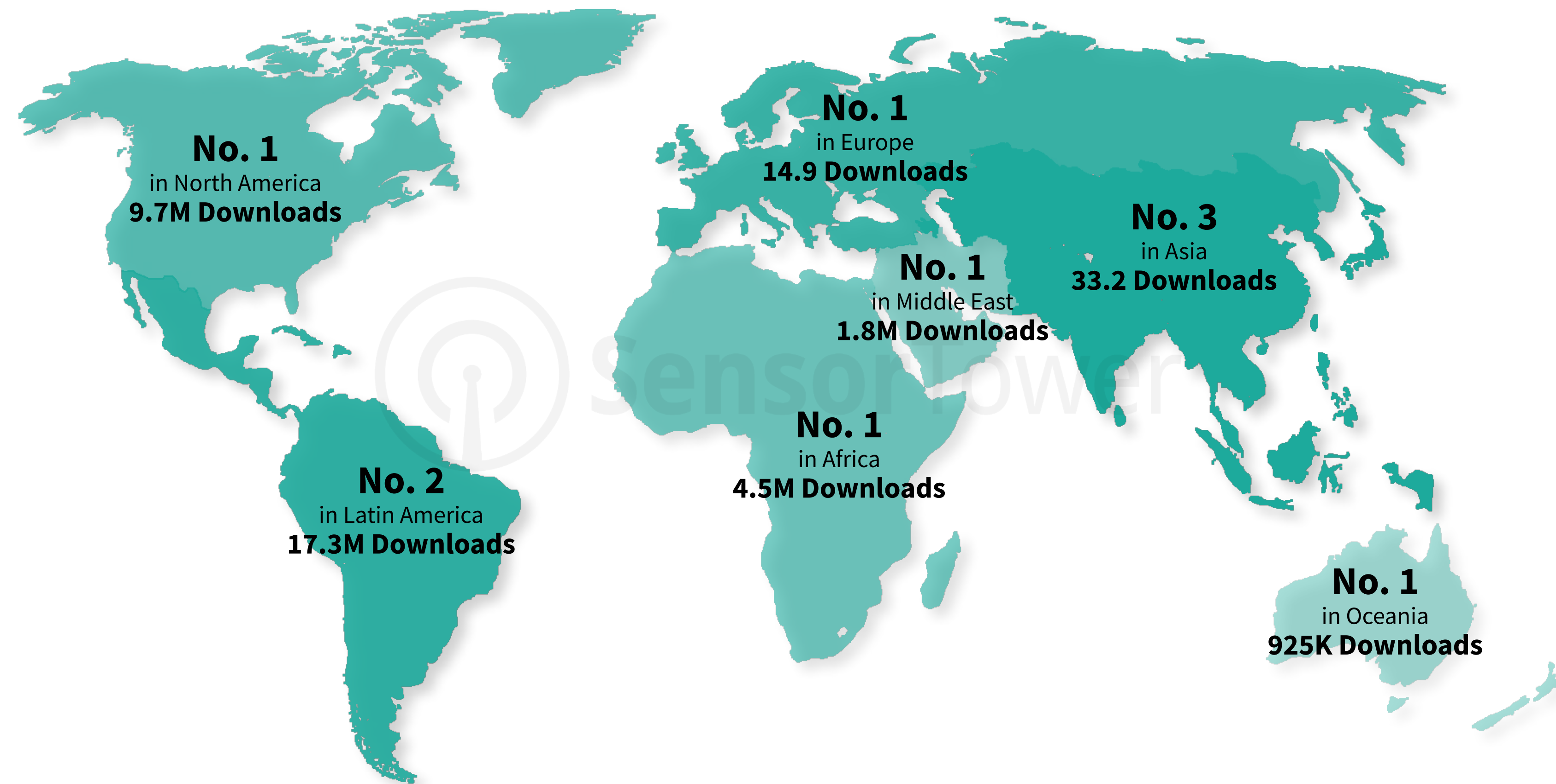
Subway Surfers was a Global Sensation in Q2 2022

Subway Surfers' rank among games by Q2 2022 downloads in each region, App Store and Google Play



Subway Surfers

Miniclip



Downloads by Region

In addition to its consistent popularity over nearly a decade, Subway Surfers had a huge quarter across the globe, ranking as the top mobile game by downloads in Q2 2022. The title was dominant across the globe, leading all games by adoption in North America, Europe, the Middle East, Oceania, and Africa.

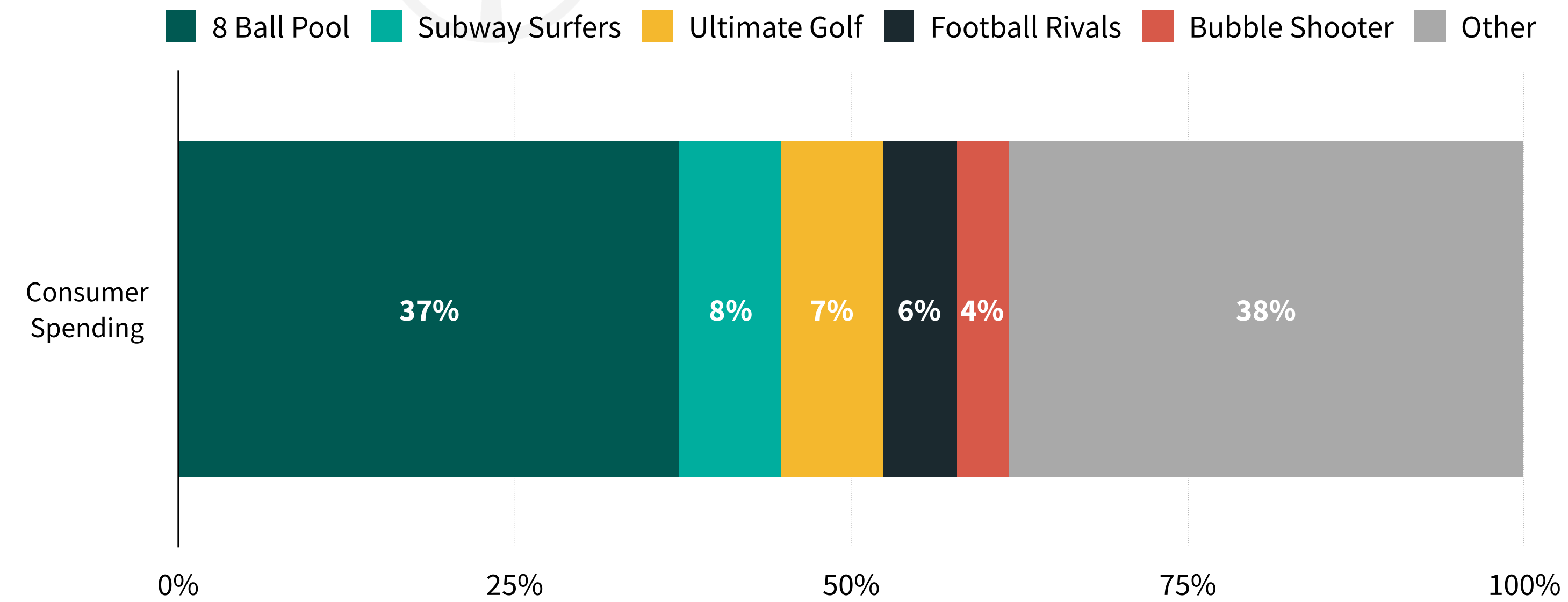
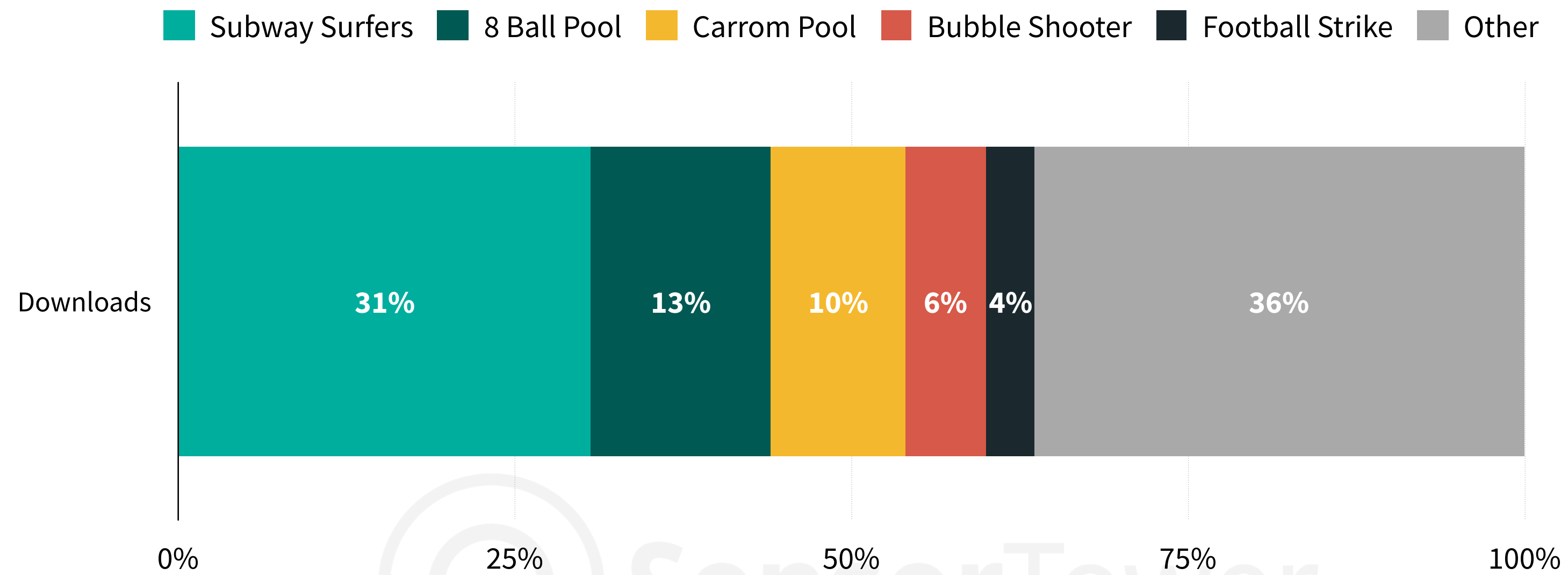
Even in the regions where Subway Surfers was not the top game it still managed to rank among the top three. Its more than 33 million downloads in Asia ranked third behind Garena Free Fire and Ludo King, and it was second behind Garena Free Fire in Latin America.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Apr. 1, 2022 through Jun. 30, 2022. Apple apps and Google pre-installed apps are excluded. We report unique installs only. Android estimates do not include third-party stores.

Subway Surfers Provides a Boost to Miniclip's Portfolio

Market share for Miniclip's mobile games in H1 2022

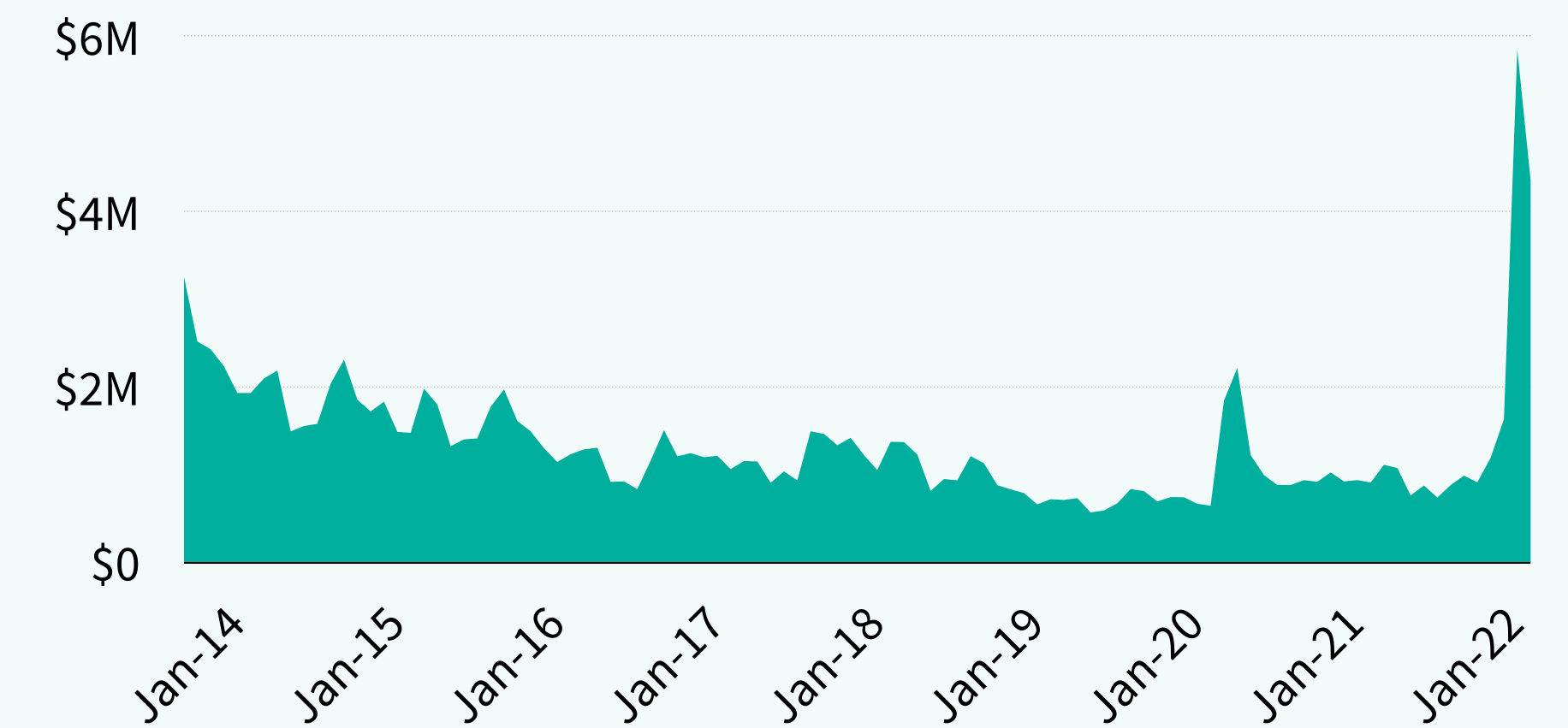


Worldwide Downloads & Spending

One of the largest mobile game publishers got even bigger with Miniclip's acquisition of Sybo. Including Subway Surfers, Miniclip was sixth in worldwide mobile game downloads in Q2 2022, only behind developers like Supersonic Studios, Azur Interactive, and AppLovin.

Miniclip may be interested in Subway Surfers for its consumer spending potential as well. Subway Surfers revenue spiked in May 2022 prior to the acquisition. With such a large user base, even incremental improvements in monetization could result in rapid revenue growth.

Subway Surfers Monthly Worldwide Consumer Spending



Stories of the Quarter:

3. The Summer Holidays are Back

A massive quarter for Travel apps in Q2 is a positive sign leading into the summer holidays in the United States and in Europe.

- **Travel apps achieved record high downloads in Q2 2022 in both the United States and United Kingdom.** As installs typically climb again in the third quarter during the peak of summer travel, expect an even greater total next quarter.
- **Airlines in particular have seen mobile adoption surge, with downloads in both the U.S. and U.K. up more than 30 percent compared to Q2 2019 before the pandemic.** Despite being slow to reopen in 2021, airline app installs in the U.K. have fully caught back up to their pre-COVID pace.
- **Consumers cannot wait to get back to attending concerts and sporting events in the U.S.** The top five ticketing apps combined for more than 10 million downloads in Q2 2022, up more than 70 percent from Q2 2019.



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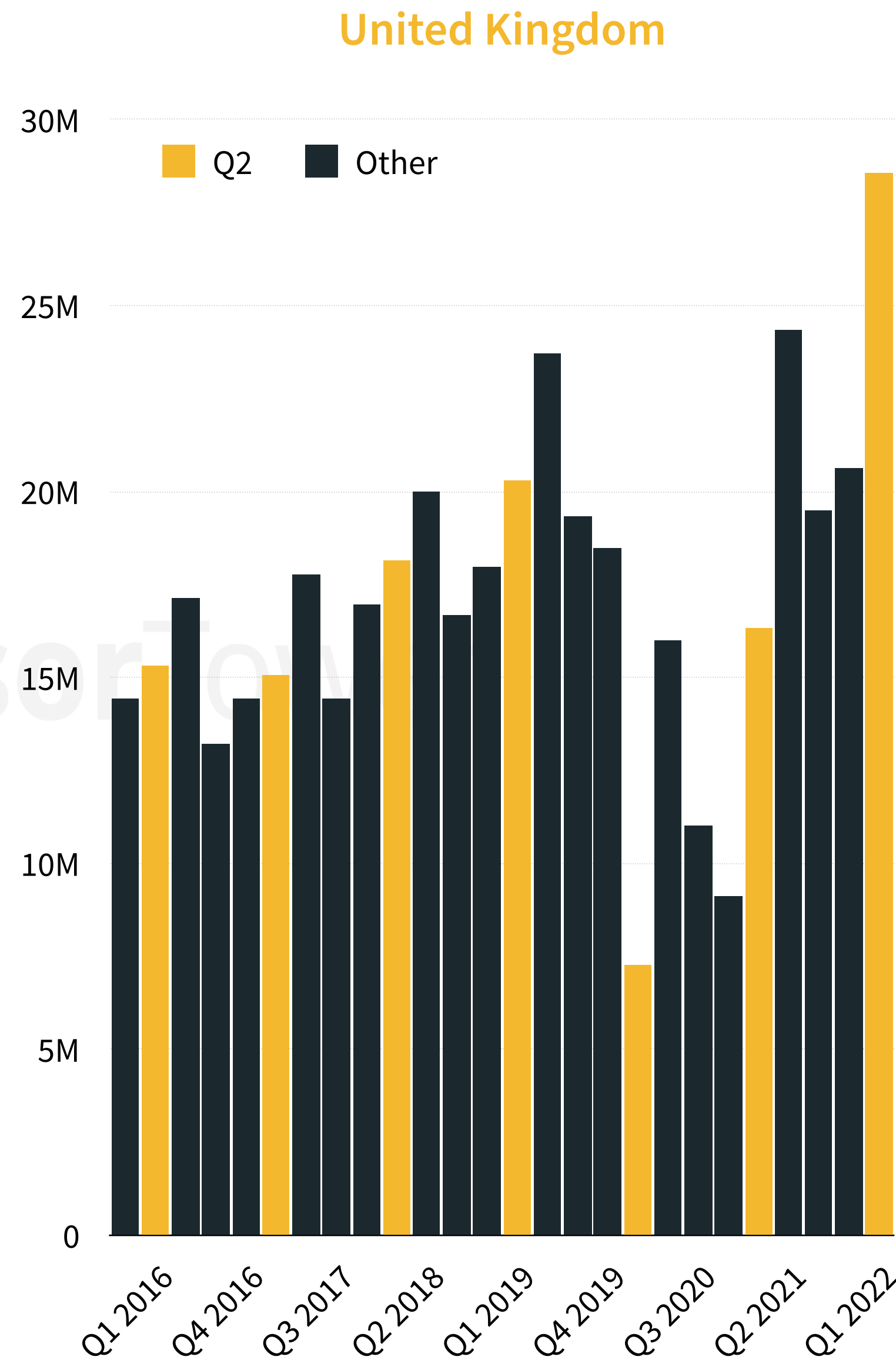
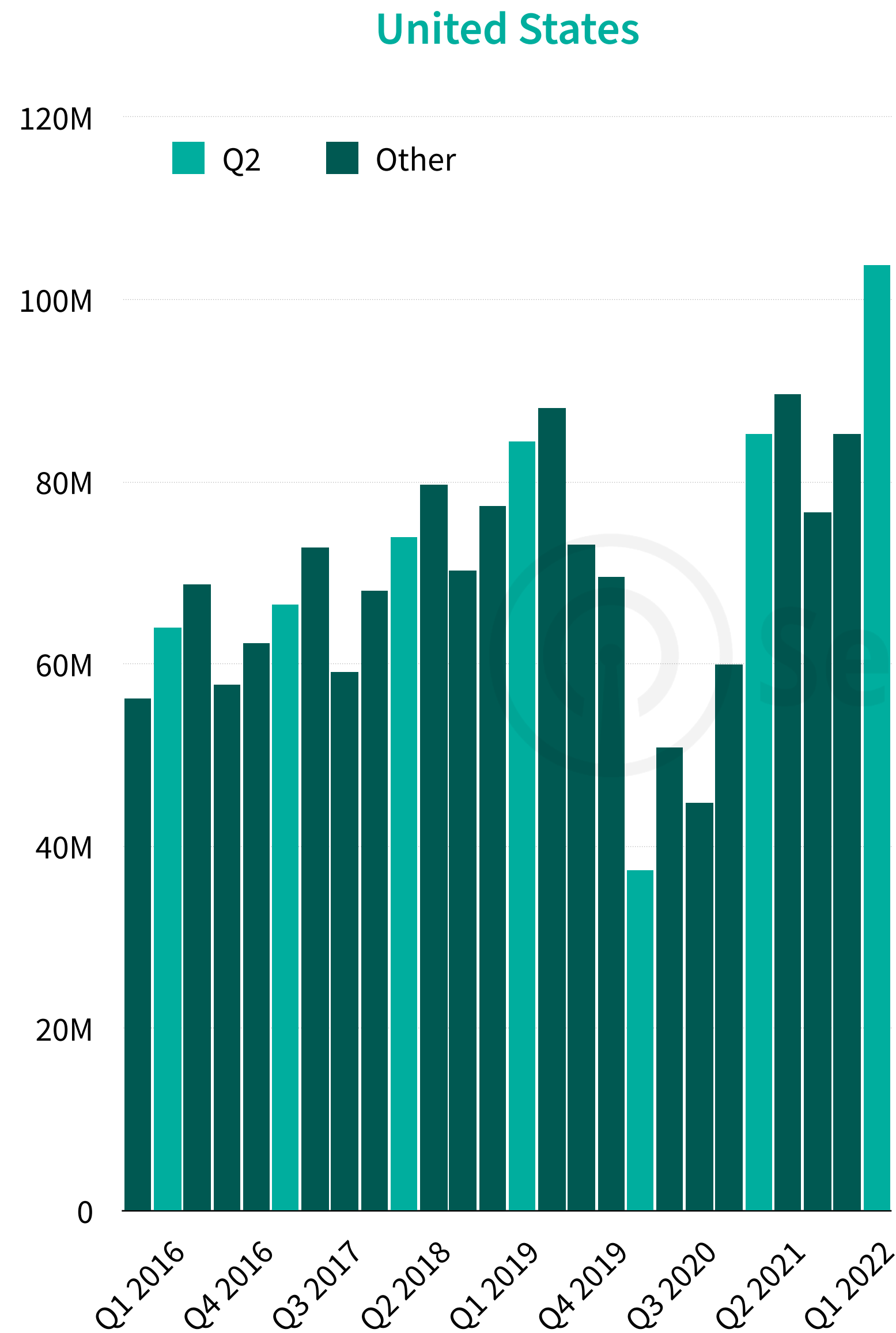
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Travel Installs Reached New Highs in Q2 2022

Quarterly Travel Category Downloads in the U.S. and U.K., App Store and Google Play



Quarterly Downloads

Travel apps in the U.S. surpassed 100 million downloads for the first time in Q2 2022, signaling that travel is finally back following the COVID-19 pandemic. Downloads were up 22 percent year-over-year and were way higher than in Q2 2020 at the start of the pandemic.

The U.K. has seen a similar, if even more extreme trend, with Travel installs reaching 28 million in Q2 2022. The U.K. remained more cautious relative to the U.S. in 2021, meaning installs did not fully bounce back until 2022. Travel app adoption came roaring back in Q2 2022, up 75 percent year-over-year.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1, 2016 through Jun. 30, 2022. Apple apps and Google pre-installed apps are excluded. We report unique installs only. Android estimates do not include third-party stores.

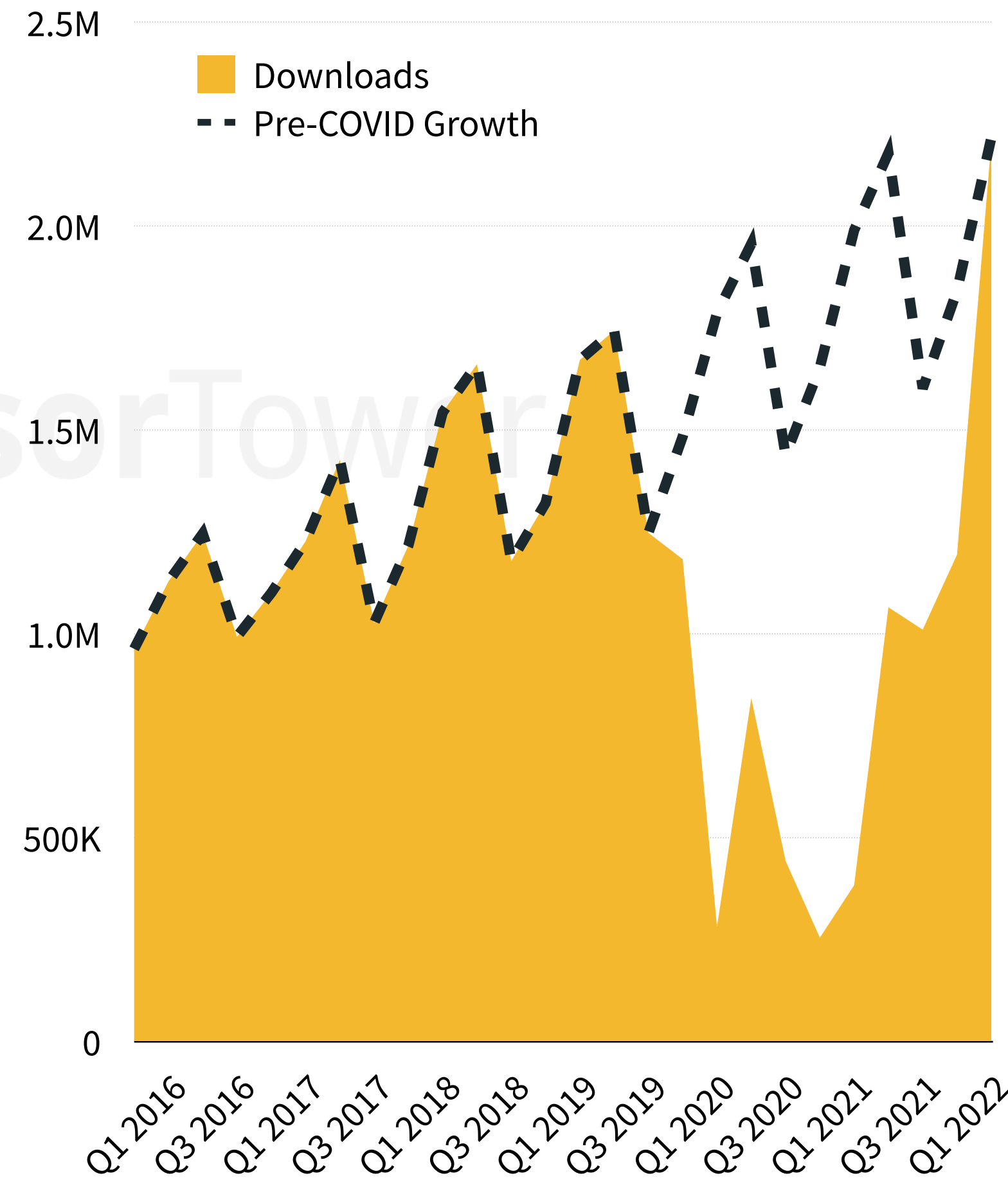
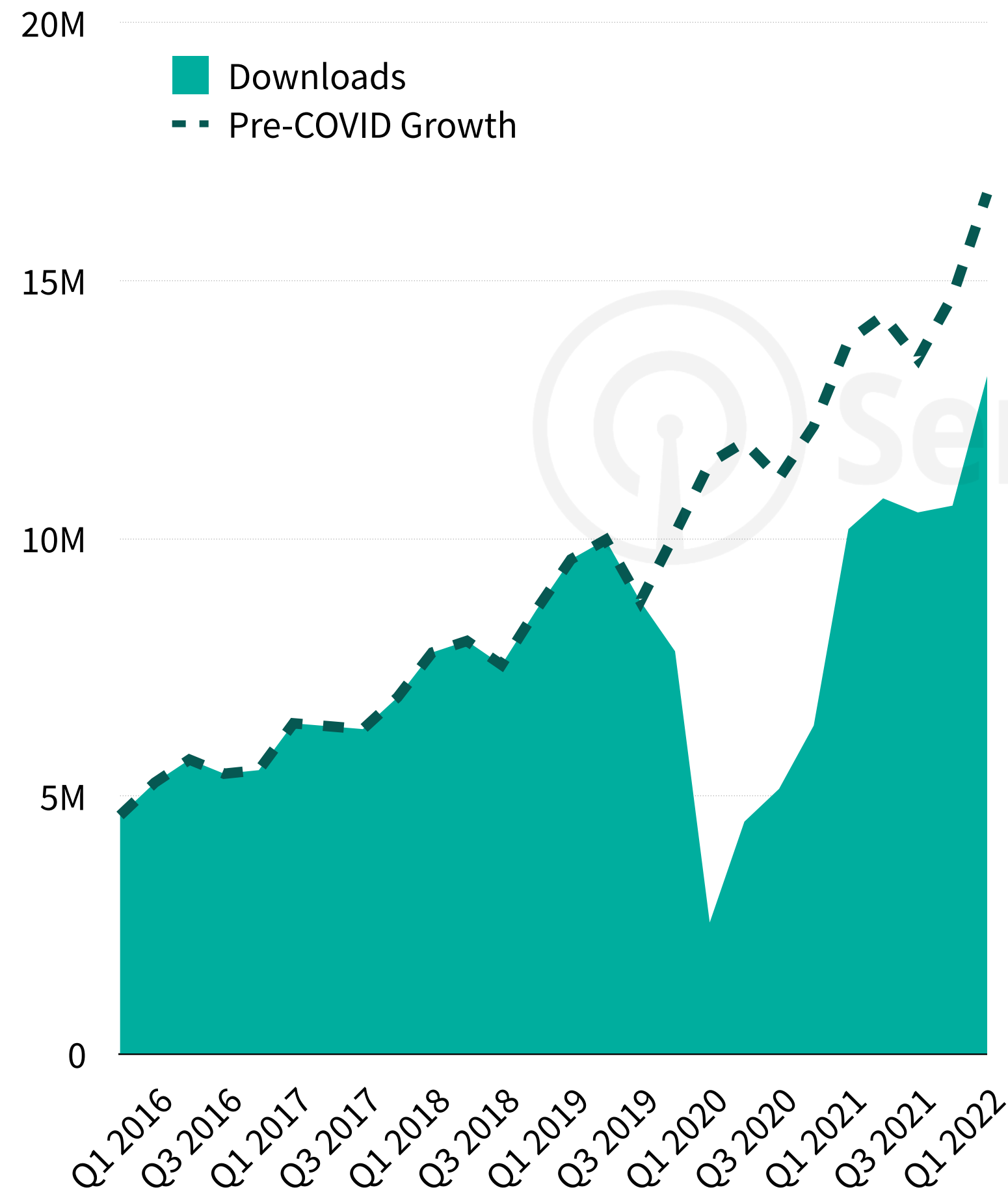
Consumers Flocked to Airports this Summer

Quarterly Downloads for Top Airlines in the U.S. and U.K., App Store and Google Play

United States



United Kingdom



Quarterly Downloads by Country

Airlines in particular saw a remarkable comeback entering the summer holidays. After downloads declined more than 70 percent year-over-year in the U.S. and more than 80 percent in the U.K. in Q2 2020, installs are back up past pre-pandemic levels.

In Q2 2022, downloads for top airline apps in the U.S. were up 37 percent compared to Q2 2019, while in the U.K. they were up 32 percent. **In the U.K., airline app downloads have actually caught back up to the pre-pandemic pace.** While they have not quite achieved this in the U.S., this was mostly due to the relatively high growth rate in the U.S. prior to the pandemic.

Note Regarding Download Estimates

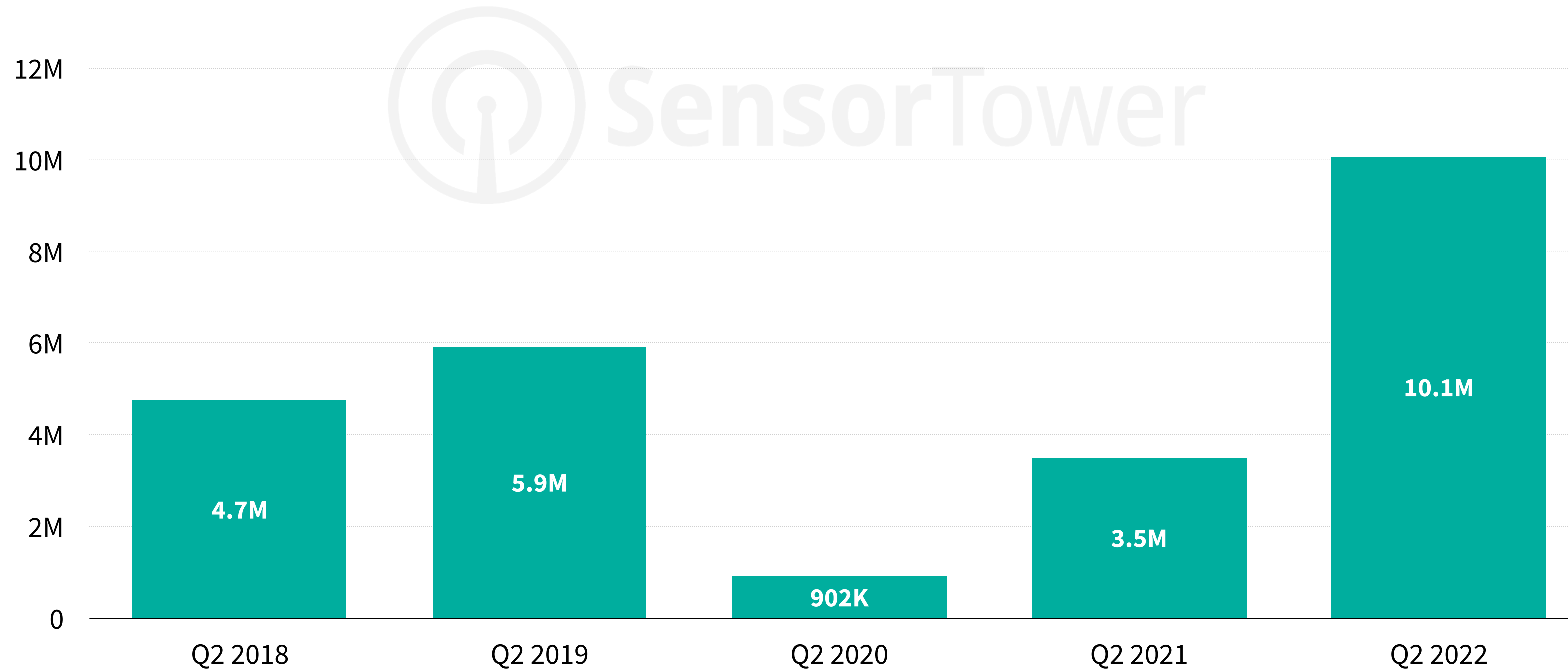
Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1, 2016 through Jun. 30, 2022. Apple apps and Google pre-installed apps are excluded. We report unique installs only. Android estimates do not include third-party stores. Projected pre-COVID growth is based on the 2016-2019 CAGR.

Demand for Attending Events in Person is Back

U.S. Downloads for the Top Five Ticketing Apps Each Q2, App Store and Google Play

Top Five Apps Each Quarter

| | Q2 2018 | Q2 2019 | Q2 2020 | Q2 2021 | Q2 2022 |
|---|--------------|--------------|--------------|--------------|--------------|
| 1 | Ticketmaster | Ticketmaster | Ticketmaster | Ticketmaster | Ticketmaster |
| 2 | StubHub | Eventbrite | Eventbrite | Eventbrite | AXS |
| 3 | Gametime | StubHub | SeatGeek | AXS | Eventbrite |
| 4 | Eventbrite | SeatGeek | StubHub | Gametime | Gametime |
| 5 | SeatGeek | Gametime | Vivid Seats | SeatGeek | SeatGeek |



U.S. Downloads in Q2

U.S. consumers are clearly anxious to return to concerts and sporting events this summer. The top five ticketing apps surpassed 10 million U.S. downloads in Q2 2022, up from just 3.5 million a year ago and less than a million at the start of the COVID-19 pandemic.

The ticketing app space is not quite the same as it was going into the pandemic. While most of the top apps are the same, AXS as emerged as a major player while StubHub declined.

Note Regarding Download Estimates

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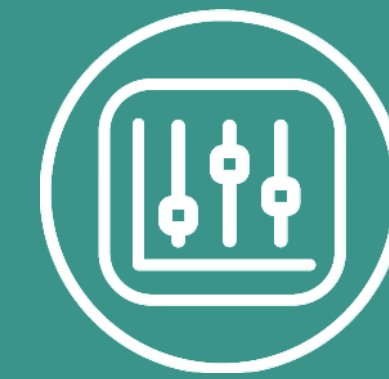
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