



Q4 2022: Store Intelligence Data Digest

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



Executive Summary: Highlights



Worldwide app downloads totaled 35.5 billion in 4Q22, a 0.1 percent year-over-year decrease.

App Store downloads grew by 2.4 percent to 8.1 billion, while Google Play installs declined about 0.9 percent to 27.5 billion.



Stumble Guys was both the top mobile game and top app by download growth globally.

Despite its recent worldwide release in 2021, the game ranked within the top five games in most regions around the world.



Instagram managed to become the top app by worldwide downloads in Q4 2022.

Meta-owned Facebook and WhatsApp, and ByteDance-owned TikTok and CapCut made up the rest of the top five most-installed apps.



The Utilities category on the App Store has consistently shown growth each quarter since Q1 2020.

Tools, its Google Play counterpart was the third fastest growing category on Google Play in Q4 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 October 1, 2022 through December 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.

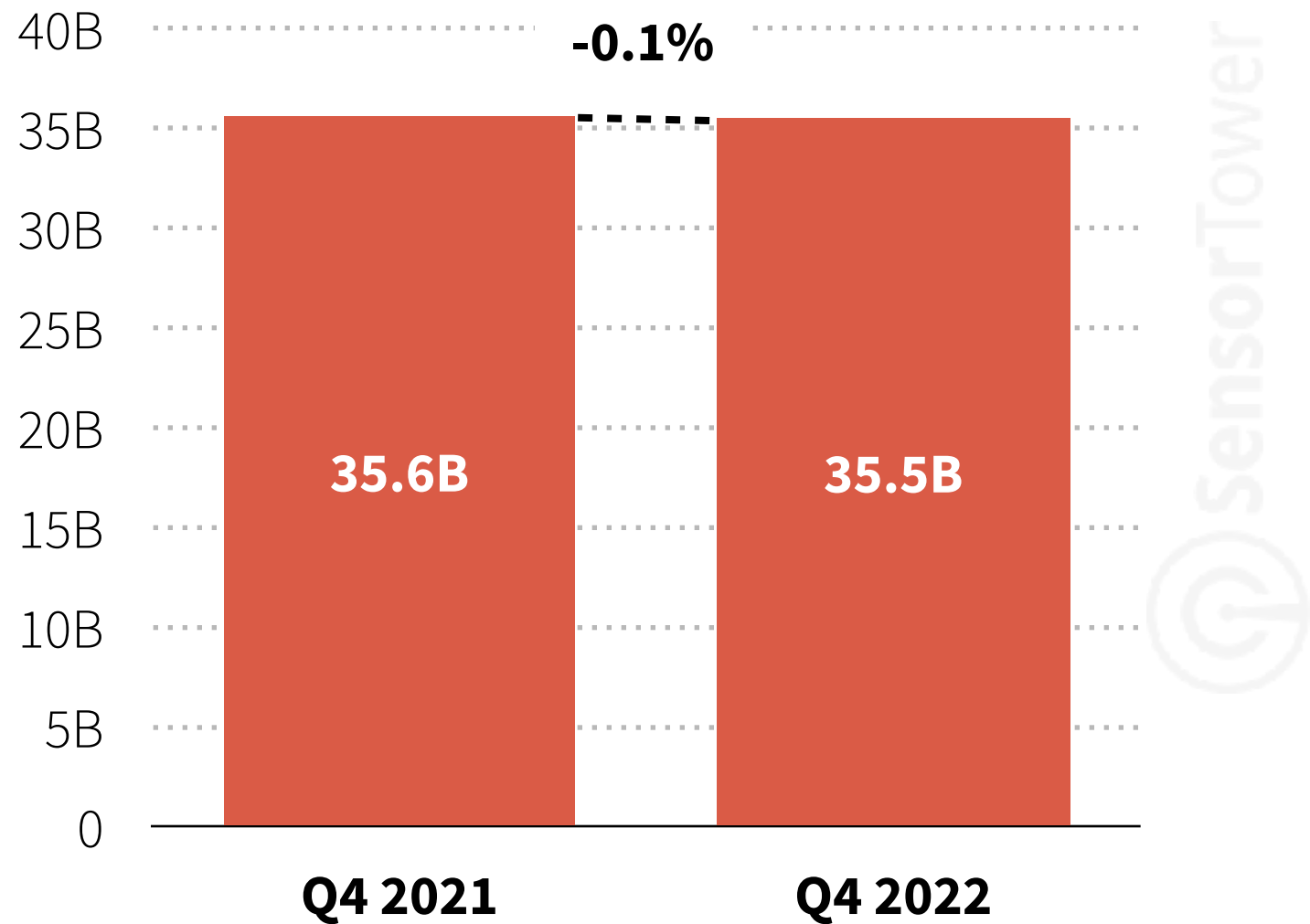
Could your business benefit from access to Store Intelligence insights and the highly accurate data used to build this report?

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

REQUEST DEMO 

Market Overview: Q4 2022 Worldwide Download Growth

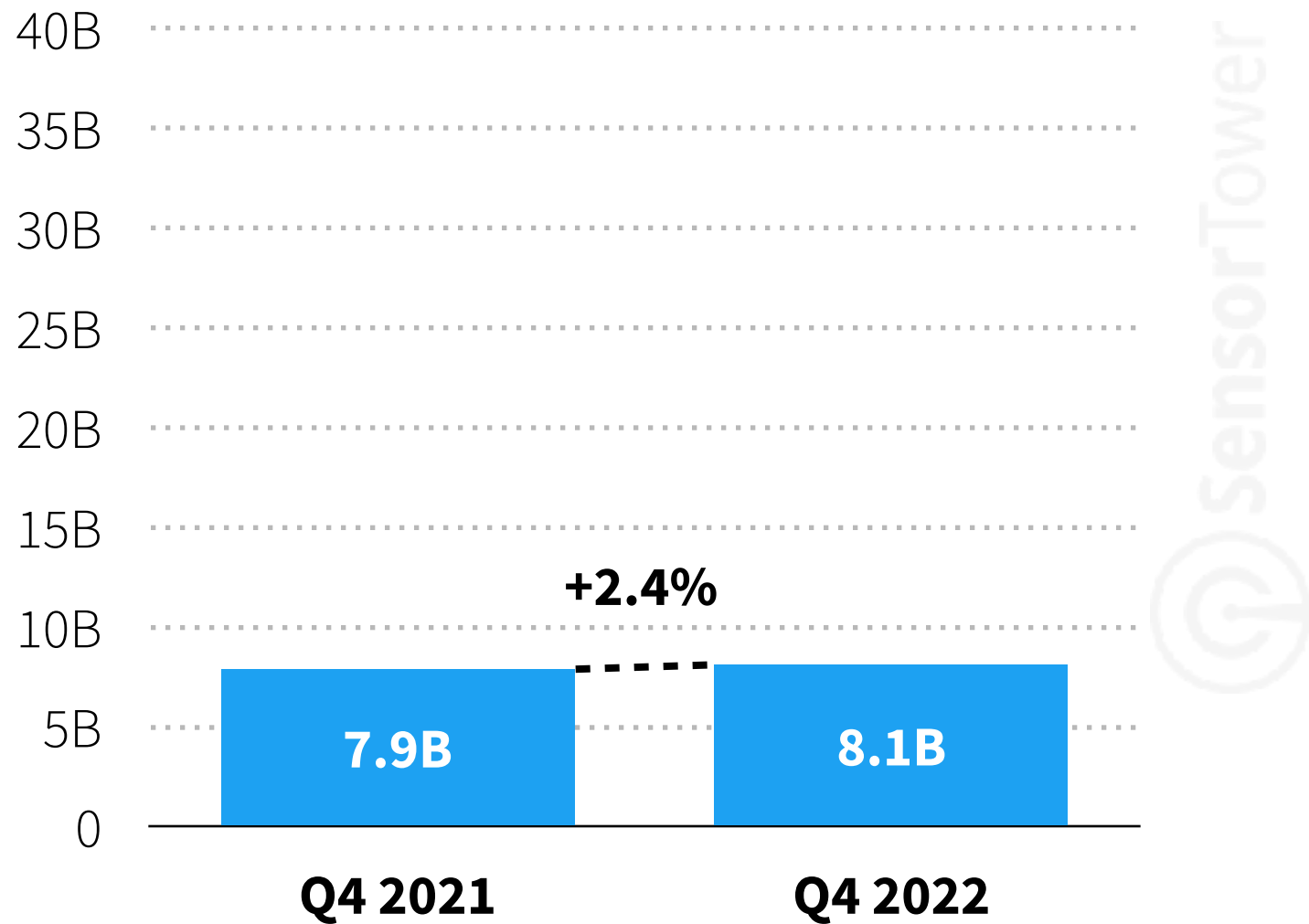
Worldwide App Store and Google Play Downloads



35.5 Billion

App Store + Google Play Downloads

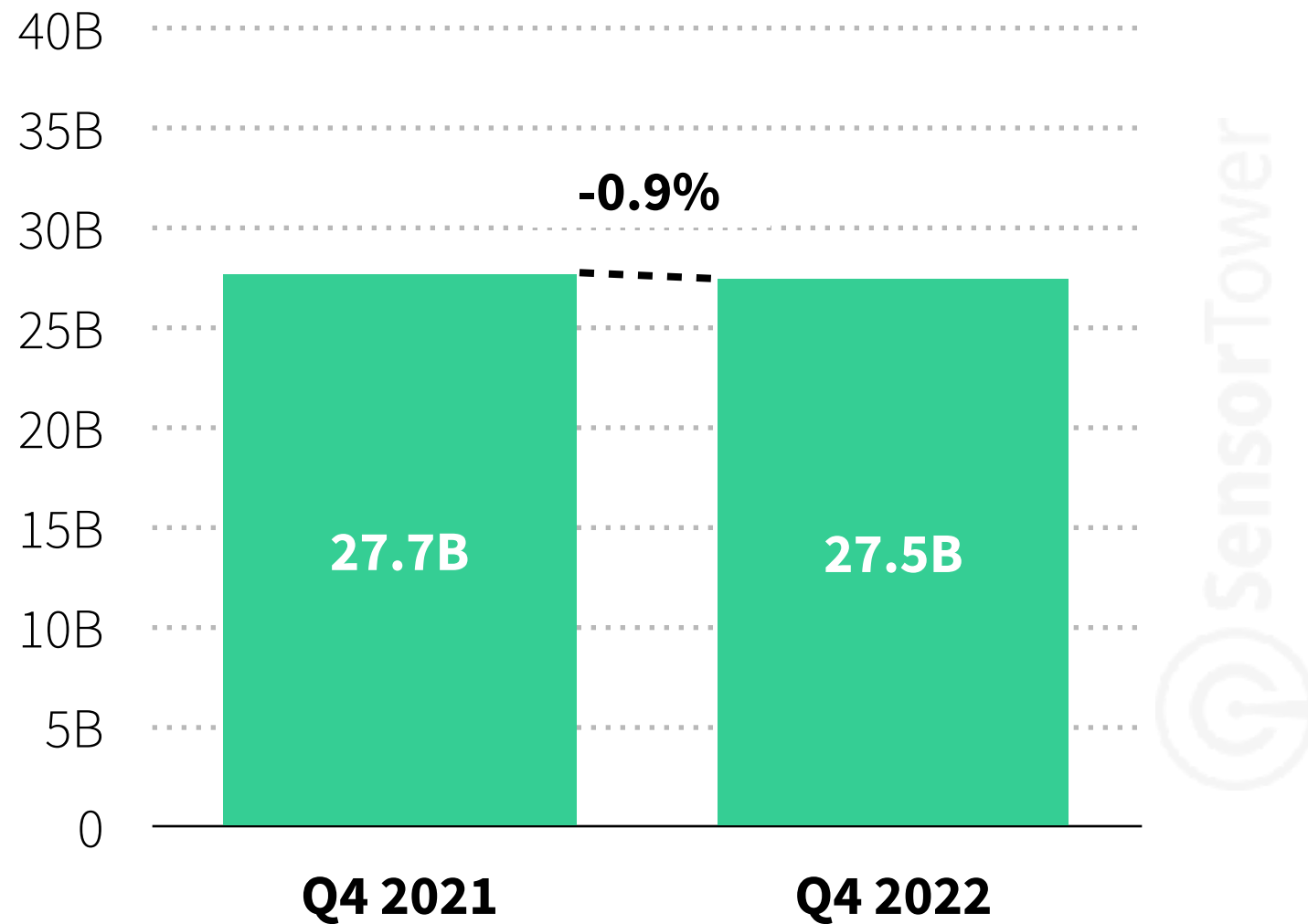
Worldwide App Store Downloads



8.1 Billion

App Store Downloads

Worldwide Google Play Downloads



27.5 Billion

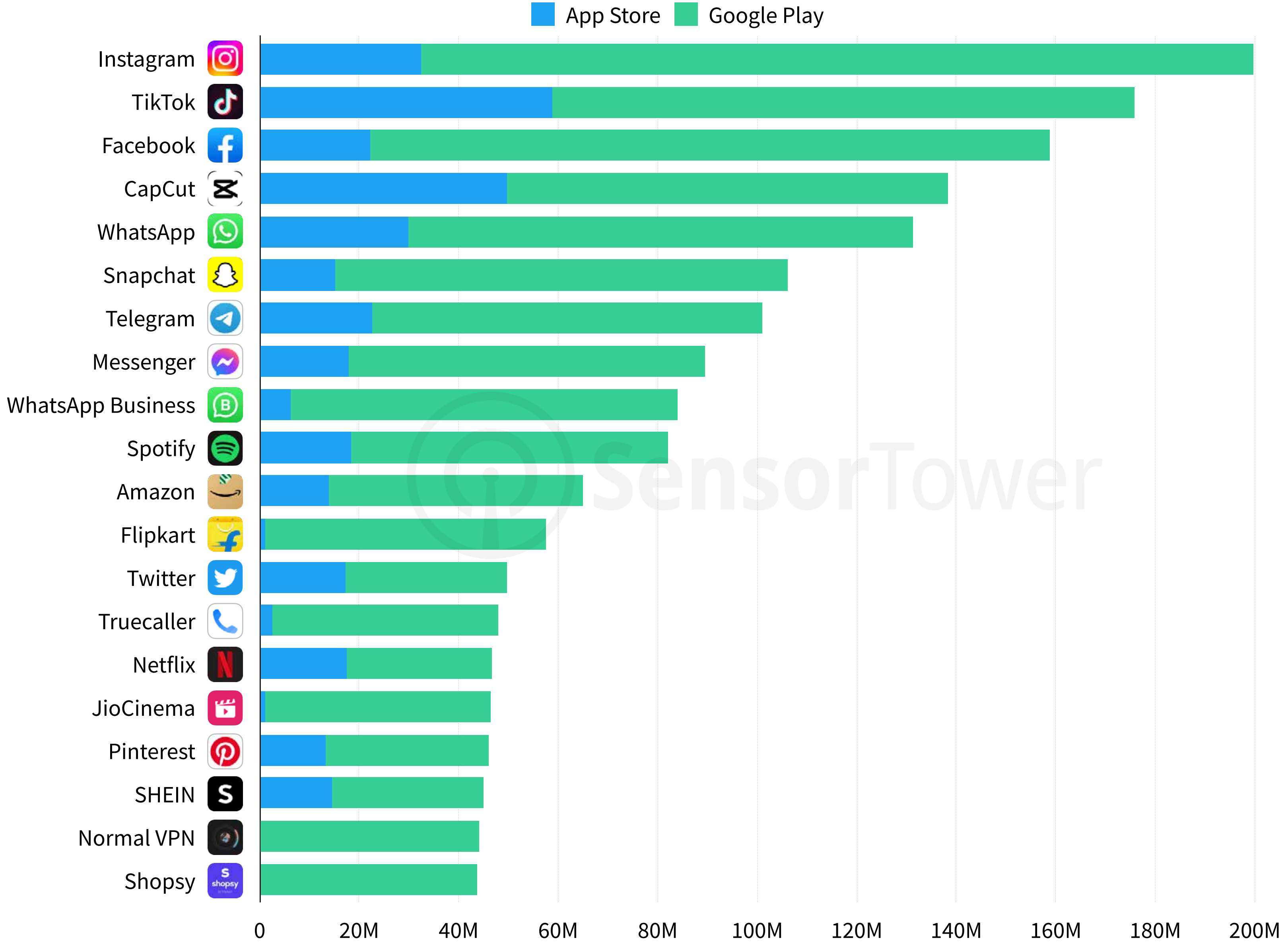
Google Play Downloads



Top Apps

Top Apps by Downloads in Q4 2022

Overall - Worldwide



Top Apps by Worldwide Downloads

Instagram held its position in the top 3 apps for the past 7 quarters, beginning in Q2 2021, maintaining the number one position in Q4 2022. Facebook and TikTok have remained in the top 3 apps below Instagram during the same period.

Meta continues its streak as the largest app publisher on mobile in Q4 2022. Half of the top 10 apps in Q4 2022 were from Meta, including Instagram, Facebook, and WhatsApp; all within the top five.

Note Regarding Download Estimates
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App Store - Worldwide

Top Apps by Worldwide Downloads

While ByteDance took the top 2 apps, Google apps including Google and YouTube placed in the top 5 at number 3 and 5, respectively.

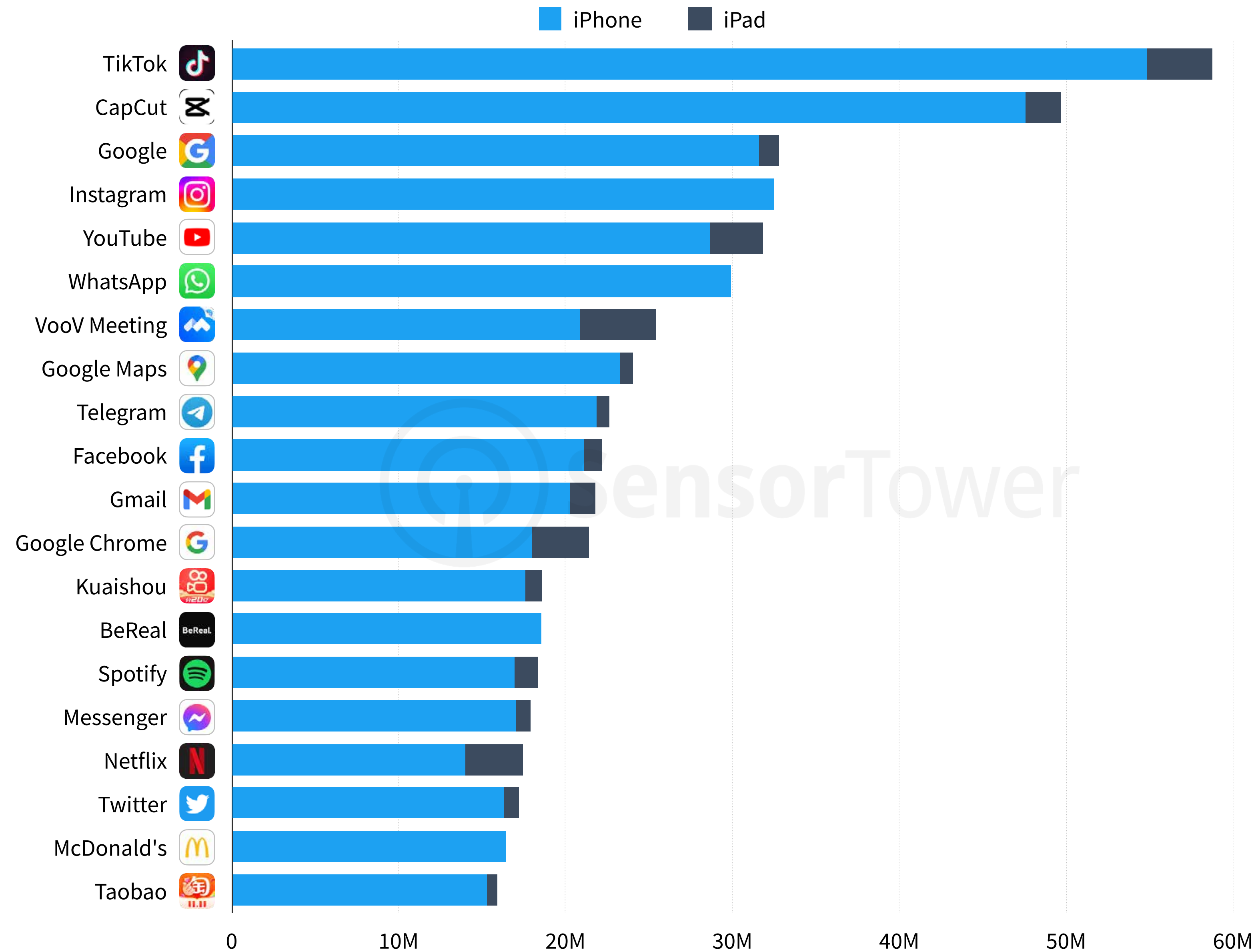
Google apps including YouTube, Google, and Google Maps have placed in the top 5 since Q2 2022.

Google Maps placed in the top 10 apps for 7 consecutive quarters, beginning in Q2 2021.

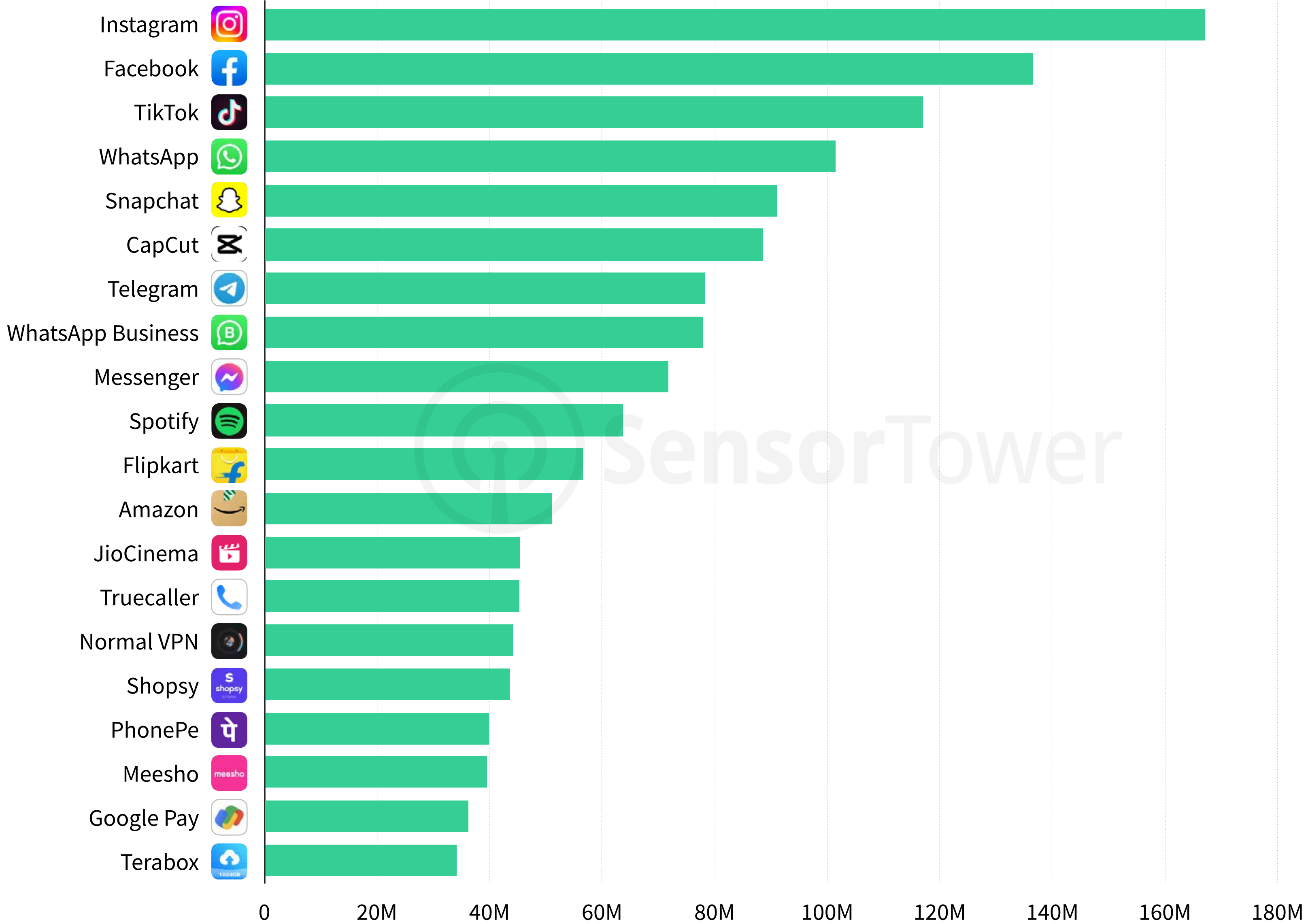
The app has generated over 108M unique installs throughout 2022.

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Google Play - Worldwide



Top Apps by Worldwide Downloads

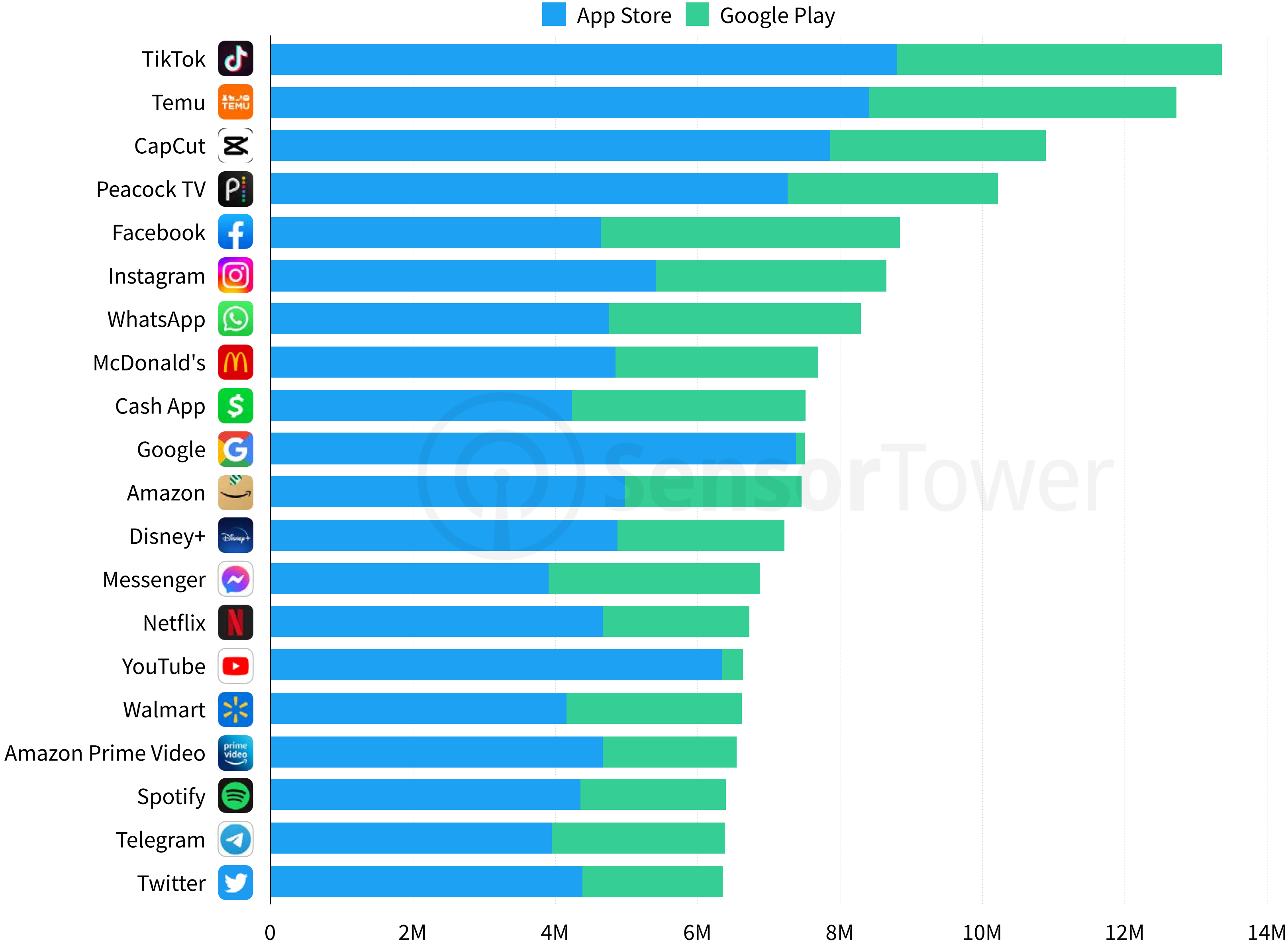
Meta led in Google Play downloads with half of the top 10 apps being published by the company. Instagram generated 167M downloads, a 22 percent increase QoQ, making Q4 Instagram’s best performing quarter of 2022.

In response to the hype surrounding the World Cup in 2022, JioCinema generated 43M downloads in Q4 2022. Downloads for JioCinema have increased 2,265 percent QoQ, making Q4 2022 JioCinema’s best performing quarter.

Note Regarding Download Estimates

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Overall - United States



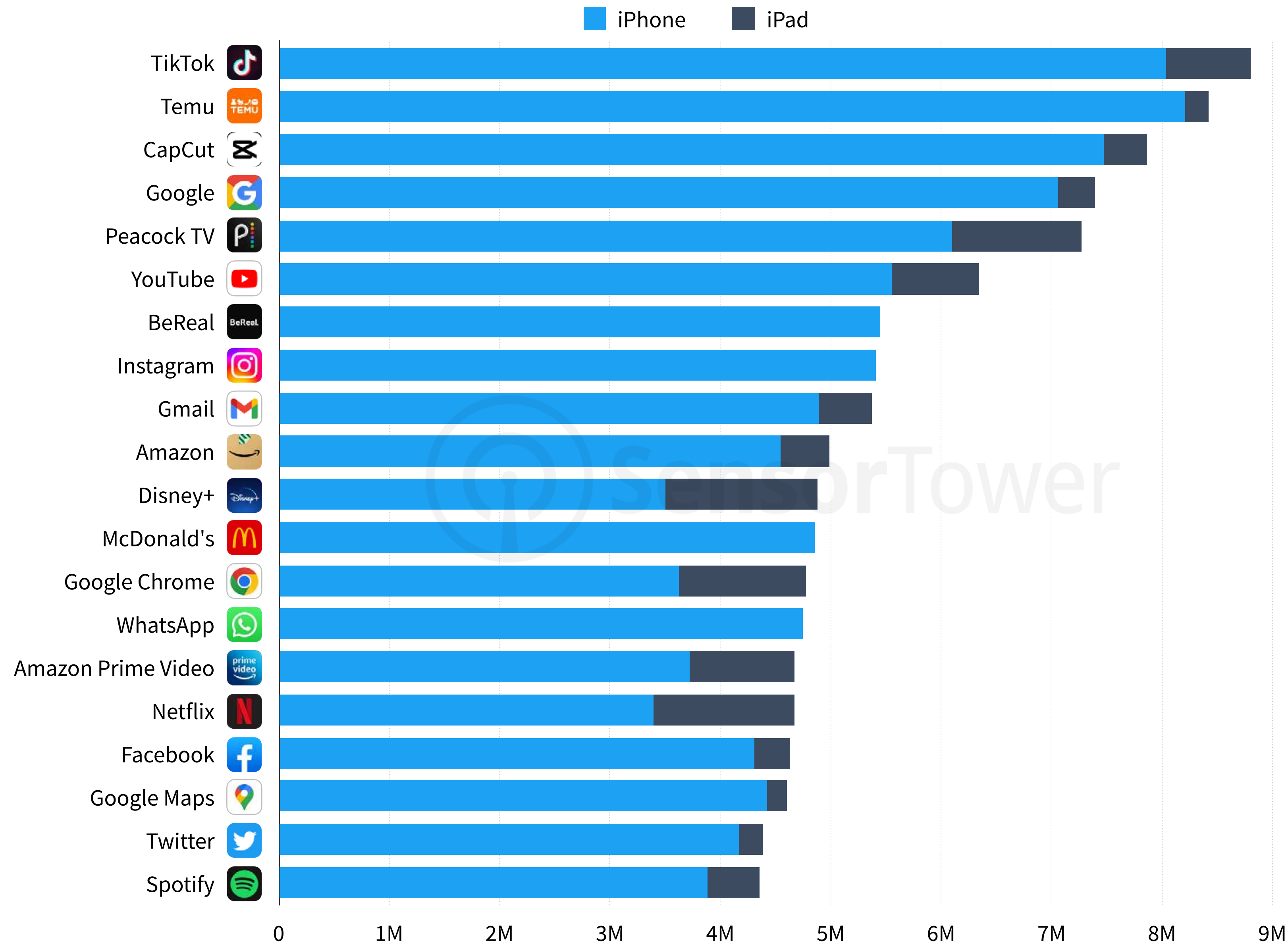
Top Apps by U.S. Downloads

For 8 consecutive quarters, beginning in Q1 2021, TikTok has taken the number 1 spot. Through Q4 2022, TikTok generated 13.4M downloads in the United States.

Temu, a Chinese online marketplace app, has entered the top 10 for the first time, following TikTok at 12.7M downloads. Temu, TikTok, and CapCut demonstrate the lead that Chinese based publishers have in the U.S. market.

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App Store - United States



Top Apps by U.S. Downloads

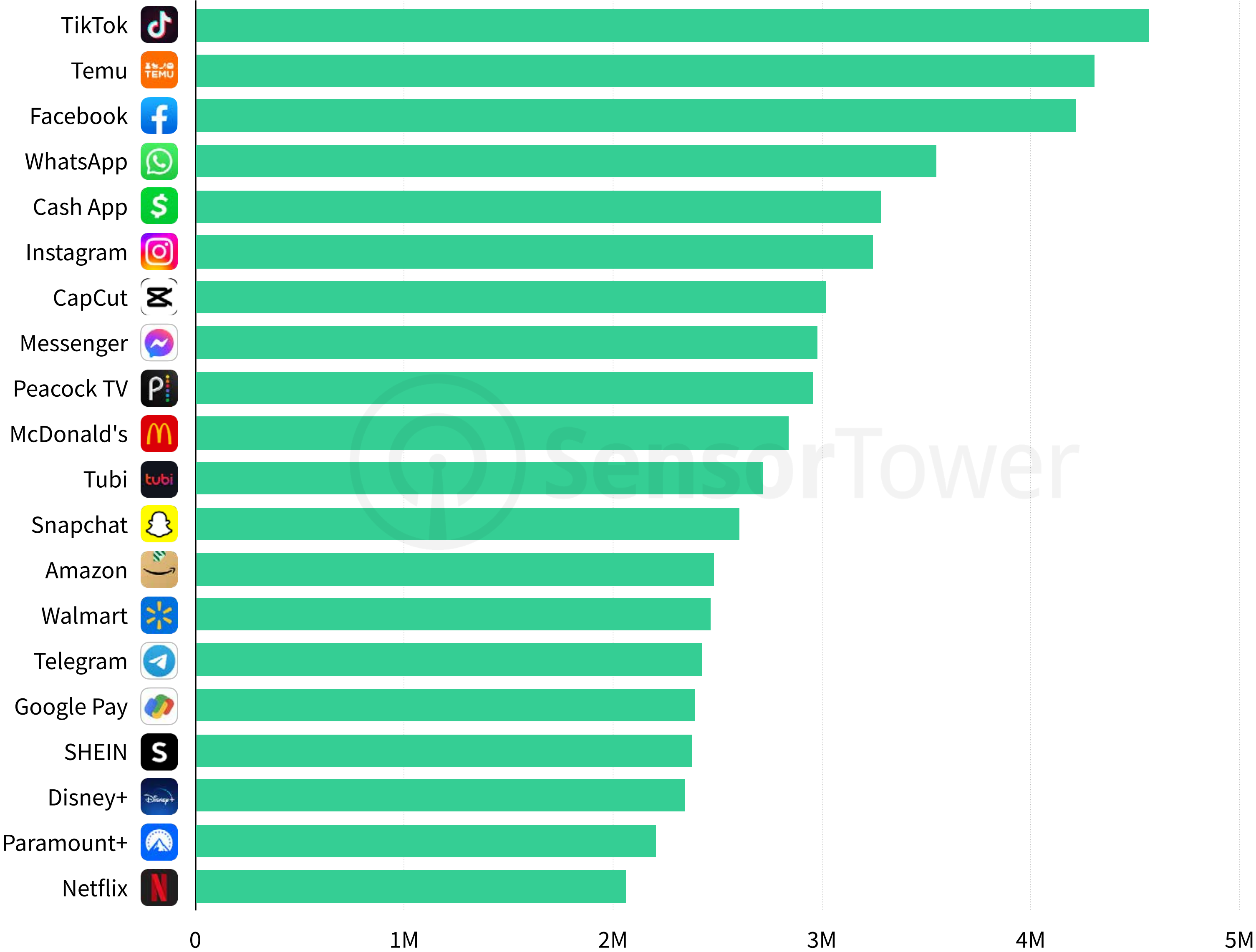
While TikTok has led in App Store downloads for 7 consecutive quarters, Temu's debut in the top 10 has made it one of the the fastest growing App Store apps of Q4 2022. Similar to overall downloads, TikTok, Temu, and CapCut's lead demonstrates the influence that Chinese publishers have on the U.S. market.

Despite a slight decline in Q4 2022, BeReal has maintained its position in the top 10 since Q3 2022 while being the fastest growing app in 2022. BeReal downloads have increased 12,914 percent YoY since Q4 2021.

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Google Play - United States



Top Apps by U.S. Downloads

TikTok and Temu have taken the number 1 and 2 position, respectively, in the Google Play store, just as they have in the App Store.

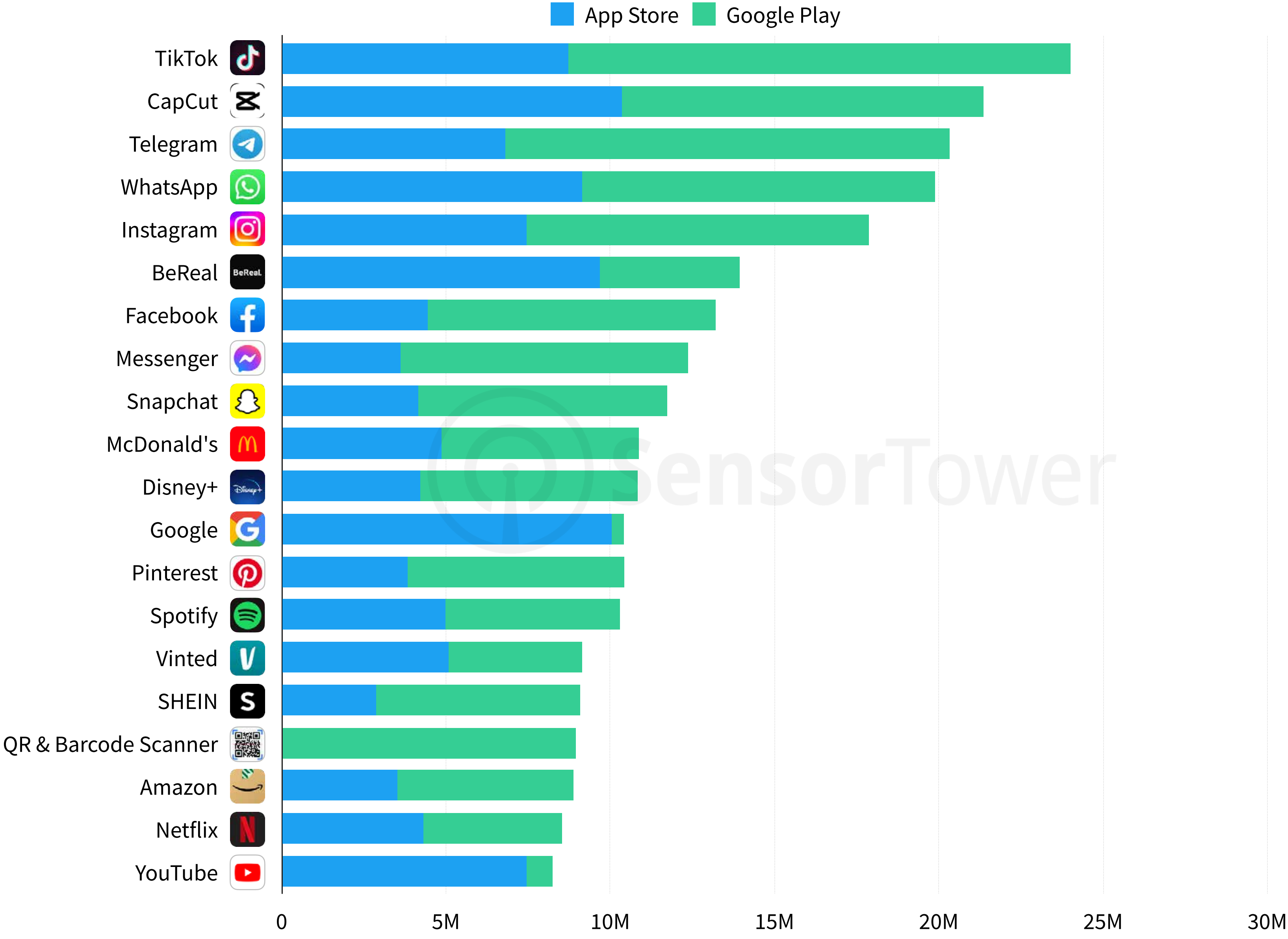
CapCut's position within the top 10 highlights China's capability to match U.S. based publisher downloads.

Cash App maintained its position in the top 5 Google Play apps for 6 consecutive quarters, beginning in Q3 2021. Despite an 11 percent decline YoY from Q4 2021, Cash App downloads have remained above 3M for the past two quarters.

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Overall - Europe



Top Apps by European Downloads

ByteDance and Meta apps lead in European downloads, owning 6 out of the top 10 apps.

ByteDance accounted for an 18 percent share of downloads with apps such as TikTok and CapCut, while Meta accounted for 29 percent of downloads with WhatsApp, Instagram, Messenger, and Facebook.

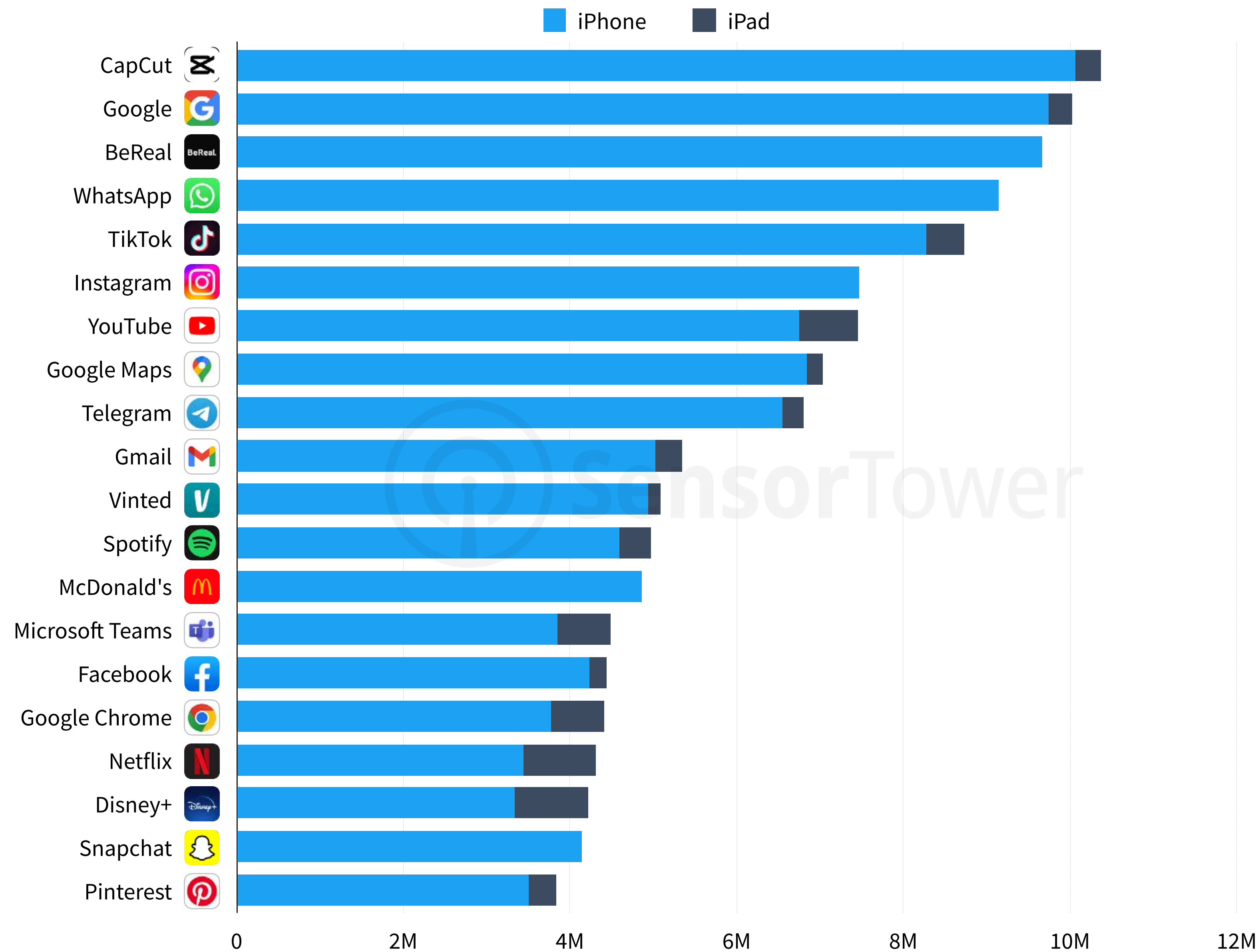
Following TikTok, Instagram, and WhatsApp, Telegram has ranked in the top 5 apps for 8 consecutive quarters since Q1 2021.

A majority of app installs for Telegram come from Russia at 31 percent, while Turkey and Ukraine are close behind at 12.5 percent, and 12 percent, respectively.

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App Store - Europe



Top Apps by European Downloads

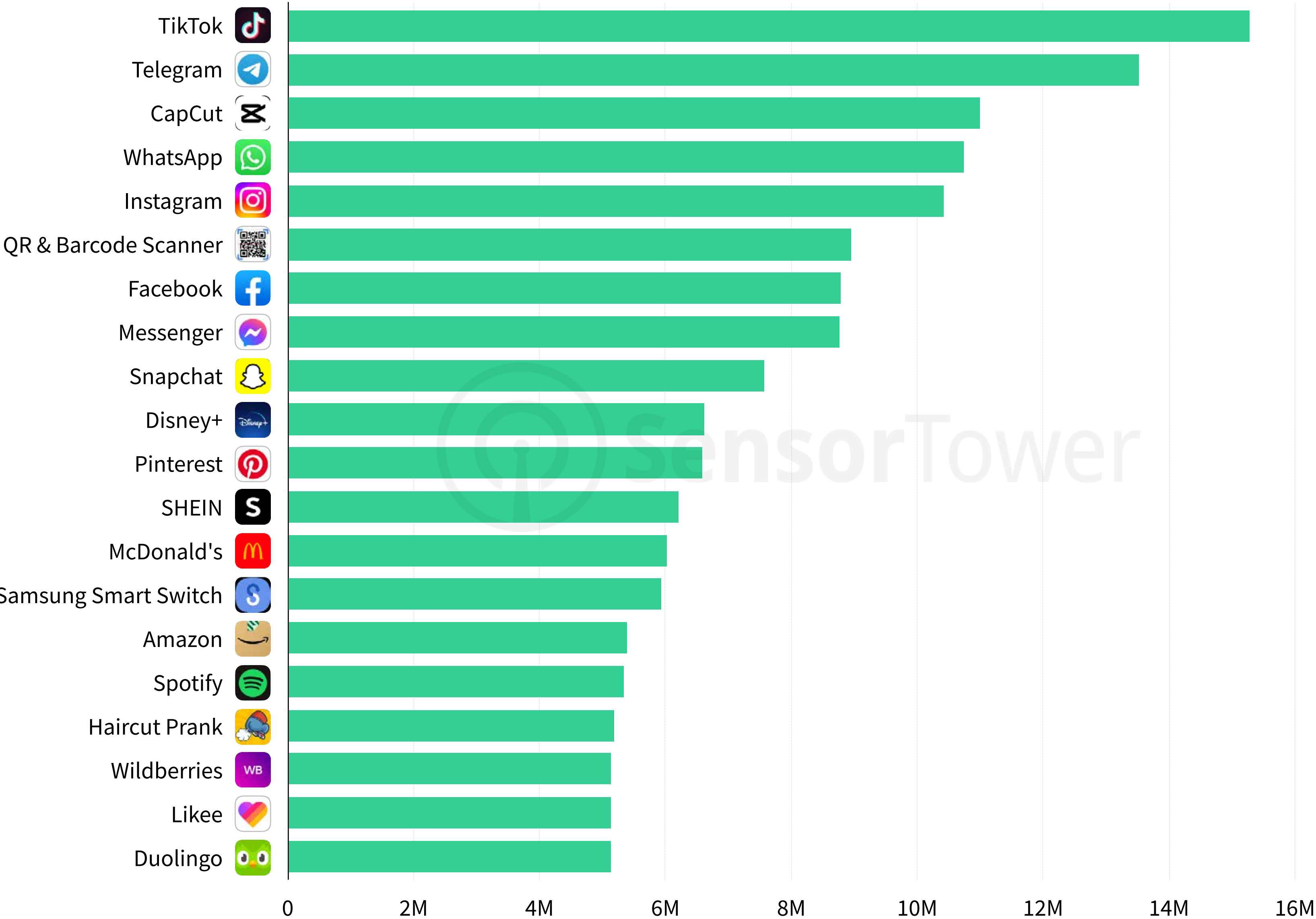
Despite a slight decline in Q4 2022, BeReal has maintained its rank within the top 5 apps for 2 consecutive quarters, beginning in Q3 2022. BeReal has generated over 9.6M downloads in Q4 2022 following CapCut and Google.

ByteDance apps including CapCut and TikTok saw the majority of their European installs in Turkey and the U.K. with 13.5 percent of market share and 12.1 percent of market share, respectively. Turkey and the U.K. were the only European countries to exceed 2M downloads in Q4 2022.

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Google Play - Europe



Top Apps by European Downloads

TikTok topped the Google Play store in Europe with over 12.3M downloads in Q4 2022.

In second place, Telegram generated 12.2M, just a few thousand behind TikTok.

QR & Barcode Scanner maintained its rank within the top 10 Google Play apps in Europe for 7 consecutive quarters, beginning in Q2 2021.

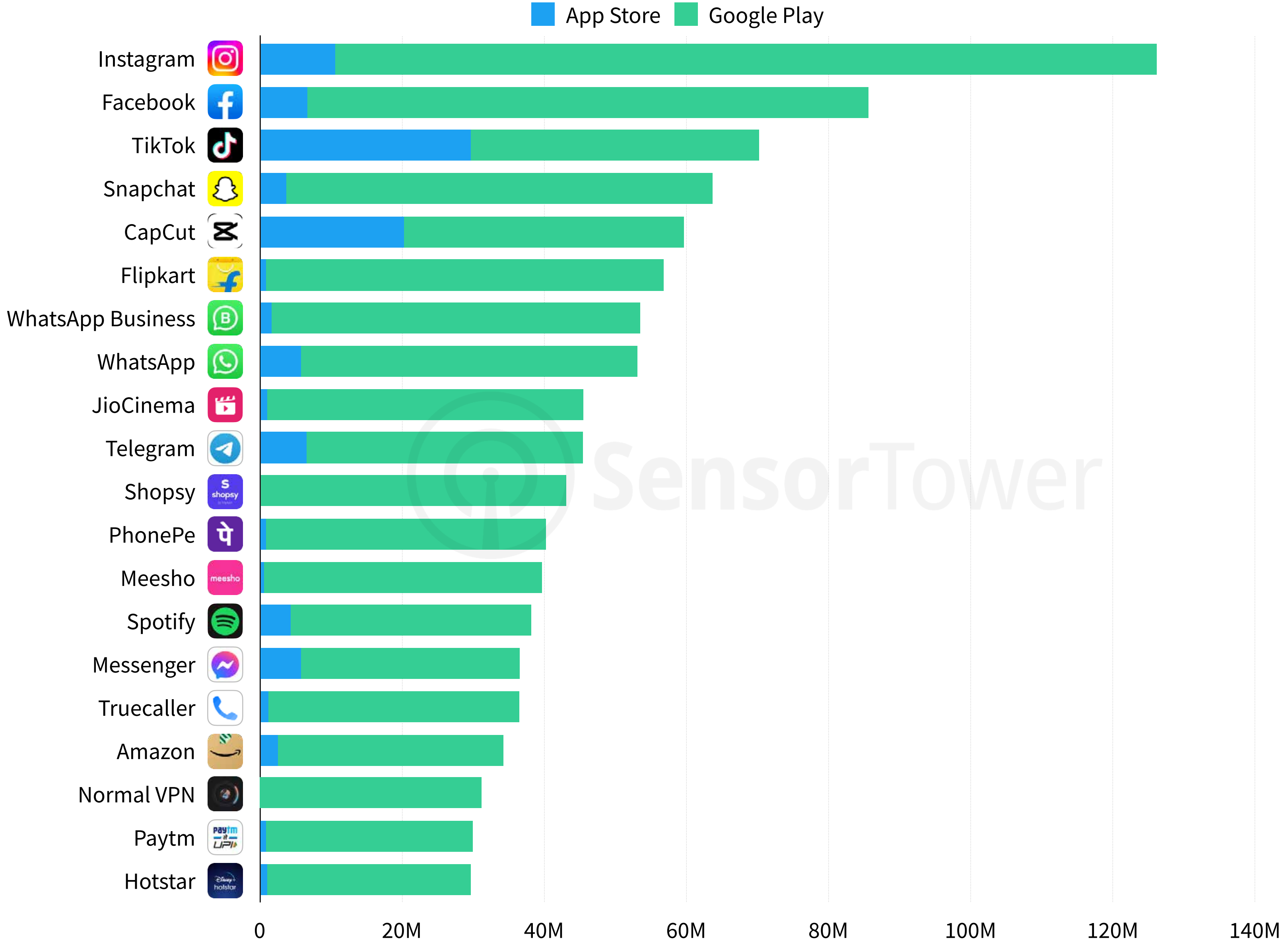
On a YoY perspective, downloads for QR & Barcode Scanner have declined 16 percent, but have followed the lead of WhatsApp and Instagram.

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Overall - Asia



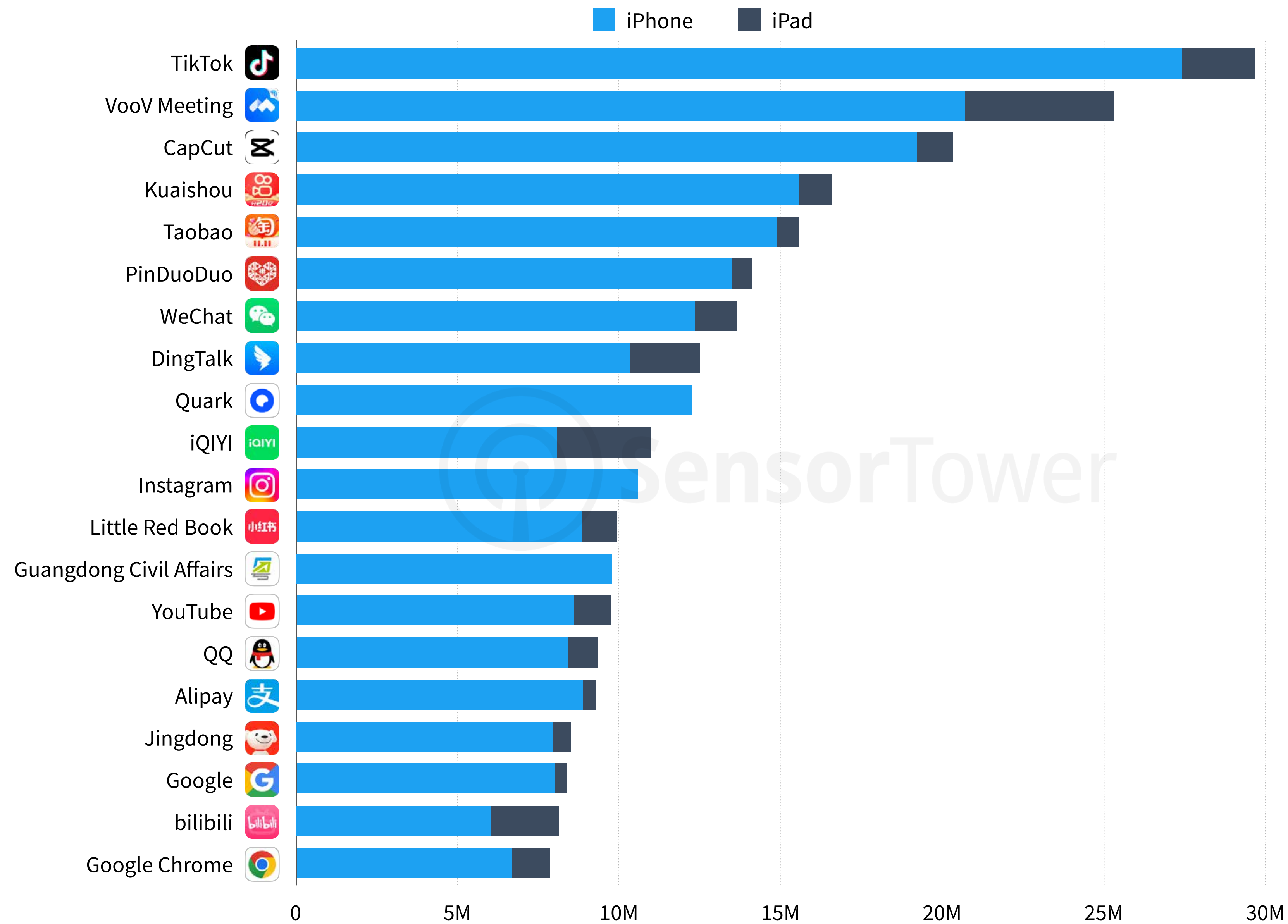
Top Apps by Asia Downloads

Instagram ranks at the top in Asia in both App Store and Google Play with 128M downloads. In terms of market share of Instagram downloads, India leads Asian countries with 74.3 percent in Q4 2022, while Indonesia takes a distant second place with an 8 percent share.

Indonesia led in TikTok app adoption in Q4 2022 with a 30 percent share of the Asian market. Beginning in Q3 2020, Indonesia led in TikTok adoption for 10 consecutive quarters.

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App Store - Asia



Top Apps by Asia Downloads

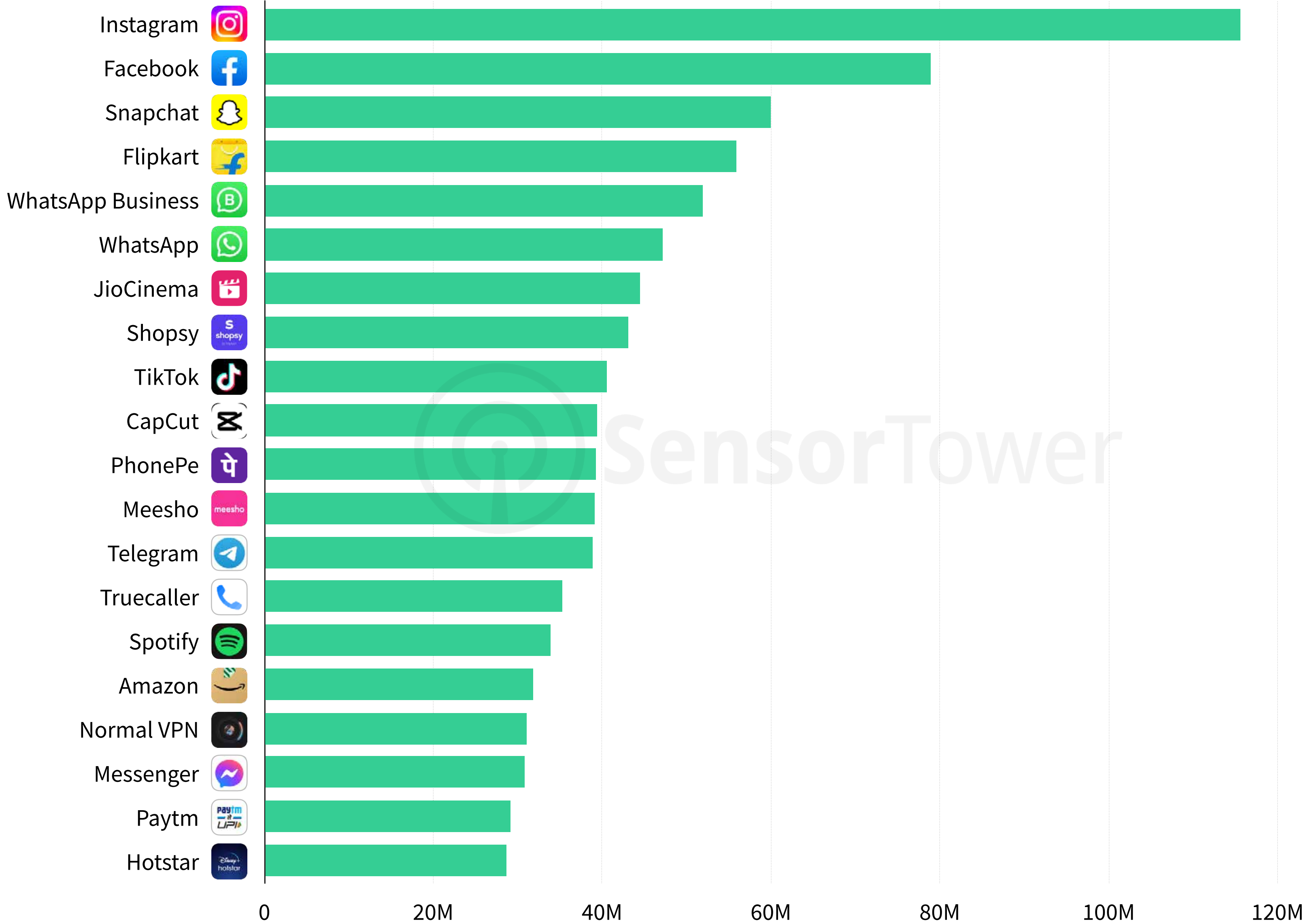
TikTok continued its lead in Asian App Store downloads, generating over 29M unique installs. Despite a 19 percent QoQ decline, TikTok remains the dominant app in the Asian market since Q2 2020.

Video apps account for four out of the top five App Store apps in downloads. Apps such as TikTok, VooV Meeting, CapCut, and Kuaishou demonstrate that features such as video editing, social networking, and communication are a popular trend in Asian countries.

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Google Play - Asia



Top Apps by Asia Downloads

Instagram led in Google Play downloads in Asia in Q4 2022 with over 116M unique installs.

Instagram has maintained its number one position in Asia for 6 quarters, beginning in Q3 2021, with India being its largest market with 79.5 percent market share in Q4 2022.

Flipkart, an Indian e-commerce app, ranked within the top 5 Google Play apps in Asia for the first time since Q4 2020.

While India has maintained its market share lead in downloads for Flipkart, Singapore maintained second place in Flipkart app adoption for 8 consecutive quarters, beginning in Q4 2021.

Note Regarding Download Estimates

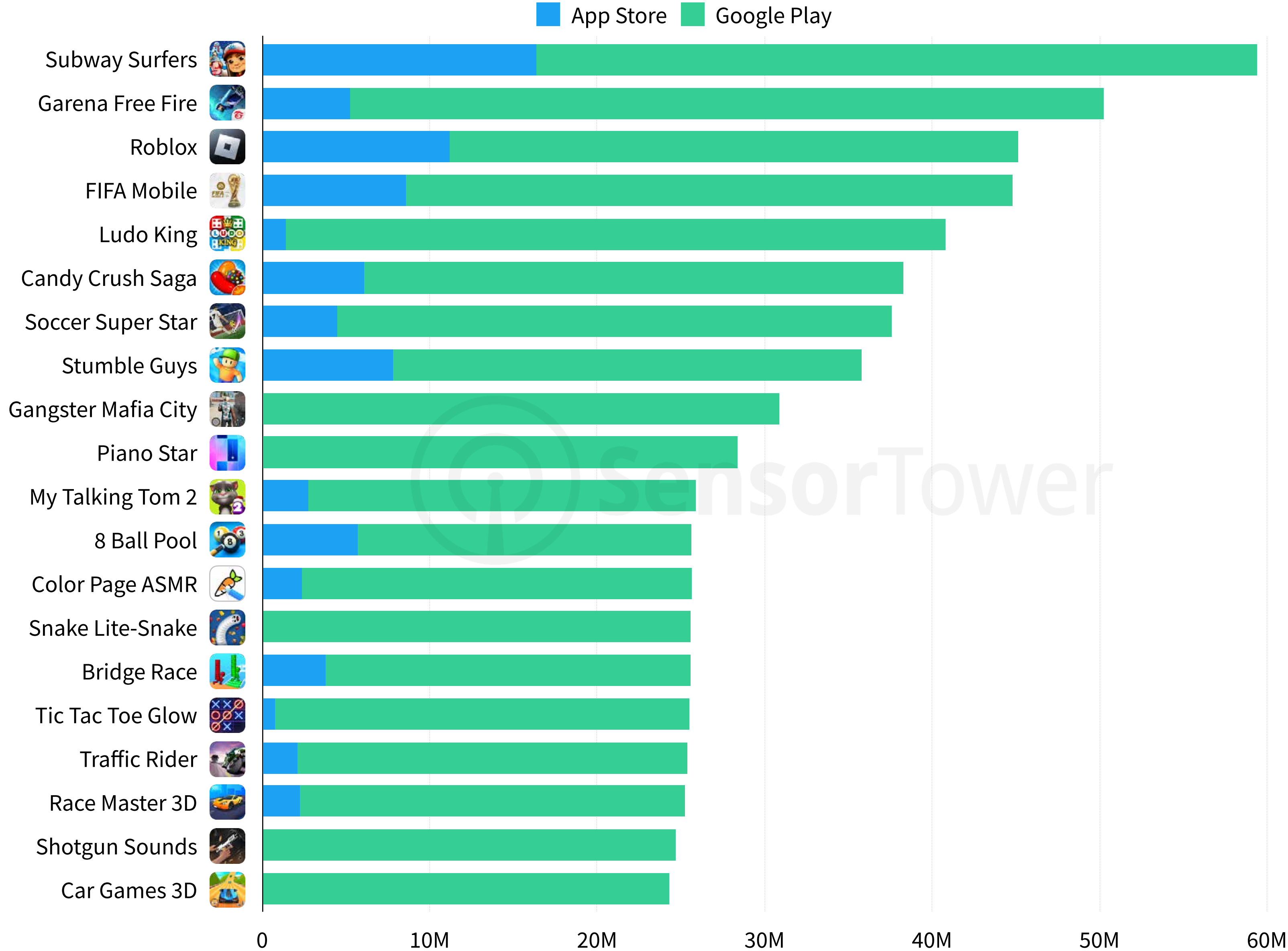
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Top Games

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Top Games by Downloads in Q4 2022

Overall - Worldwide



Top Games by Worldwide Downloads

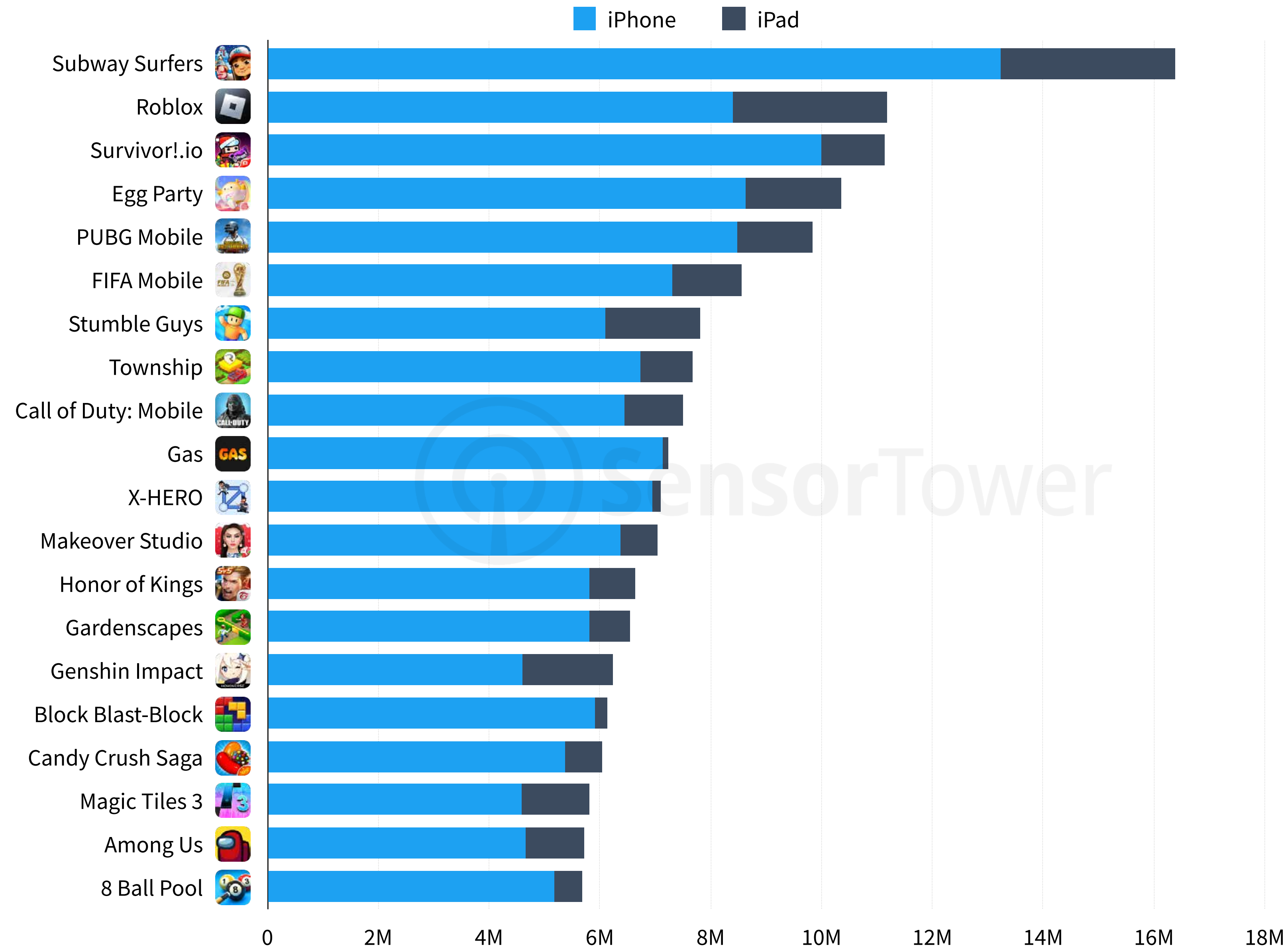
Subway Surfers led in mobile game downloads globally in Q4 2022 with more than 59M installs, a 29 percent decline QoQ from Q3 2022. Along with the Subway Surfers decline, top ranked games including Garena Free Fire, Roblox, Ludo King, and Candy Crush Saga all experienced download declines QoQ.

With the World Cup taking place in November 2022, football games such as FIFA Mobile and Soccer Super Star grew 137 percent and 112 percent QoQ, respectively. Brazil led in app adoption for FIFA Mobile and Soccer Super Star, with collective downloads at 13 percent market share.

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App Store - Worldwide



Top Games by Worldwide Downloads

Subway Surfers dominated global App Store downloads with over 16M in Q4 2022.

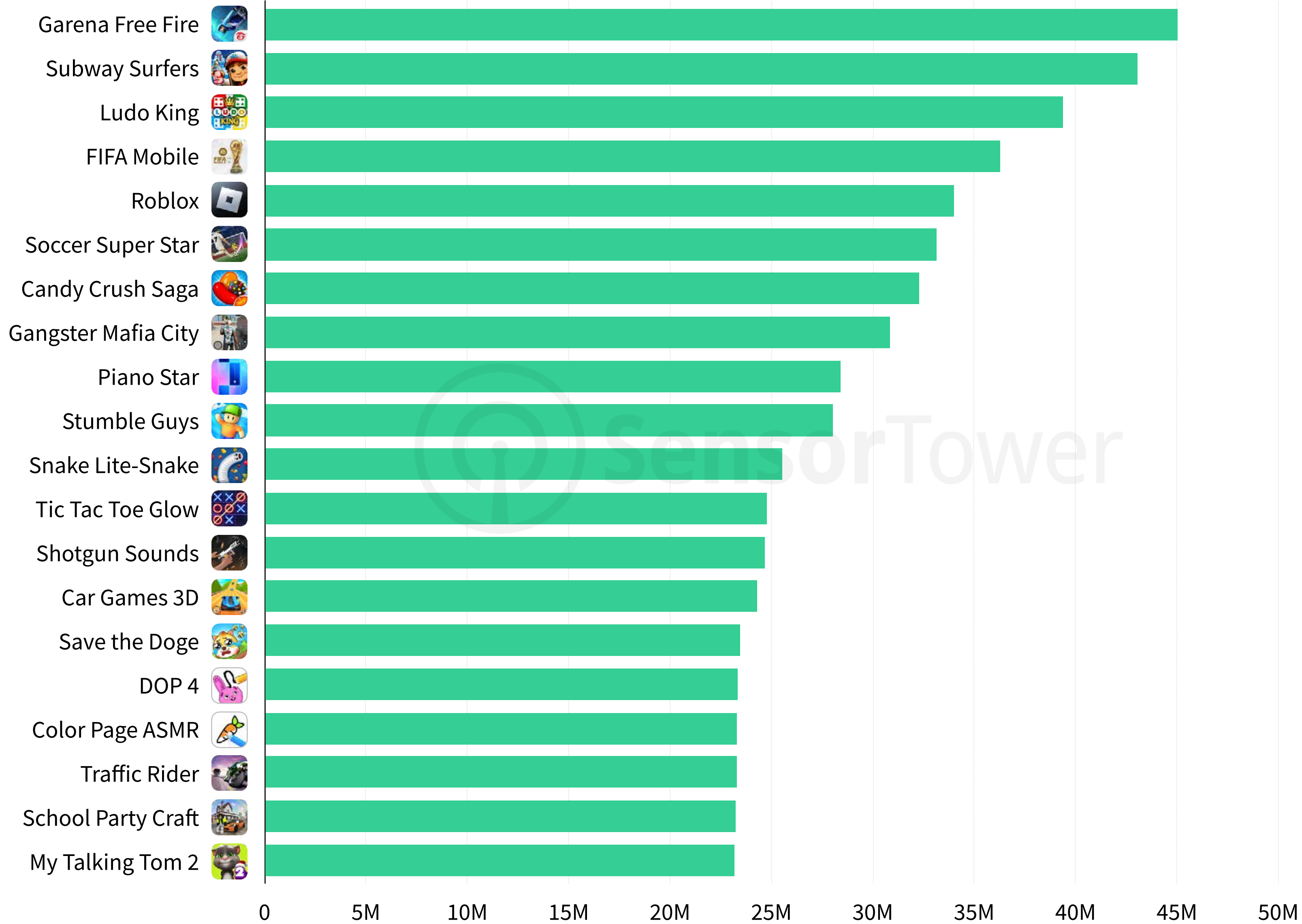
The game has maintained its ranking within the top 5 App Store games for 6 quarters, beginning in Q3 2021.

Apps within the top 20 games have seen massive growth in Q4 2022. Egg Party grew 162 percent QoQ, FIFA Mobile grew 136 percent QoQ, Township grew 41 percent QoQ, and Gardenscapes grew 244 percent QoQ.

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Google Play - Worldwide



Top Games by Worldwide Downloads

Garena Free Fire led in global Google Play downloads with over 44M in Q4.

Despite a 15.8 percent decline QoQ, Garena Free Fire has maintained its number one position among all Google Play games since Q4 2018.

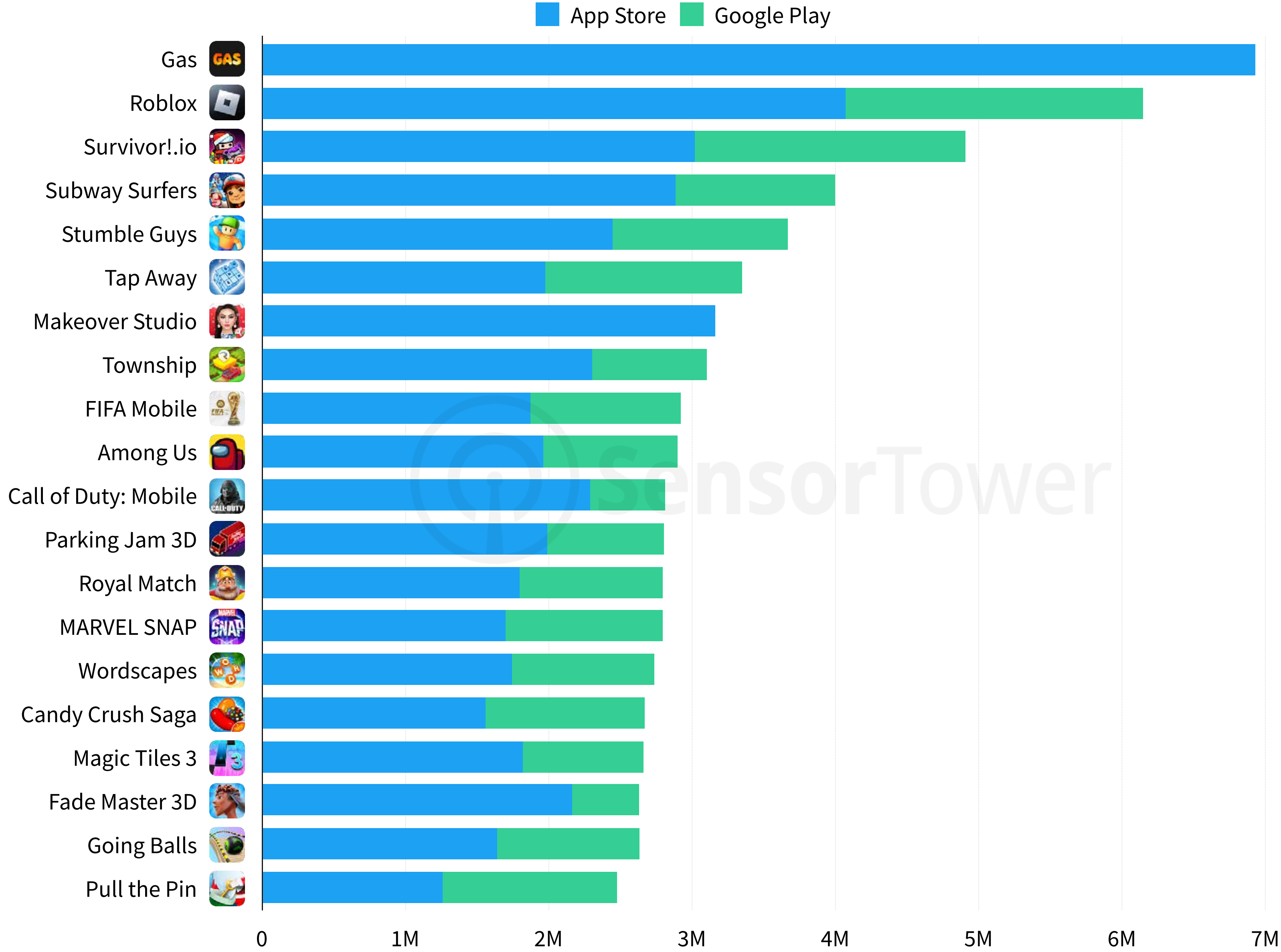
In response to the hype around the World Cup, football apps including FIFA Mobile and Soccer Super Star ranked within the top 10 Google Play games.

A majority of downloads for FIFA Mobile and Soccer Super Star came from Brazil in the two quarters leading up to the World Cup.

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Overall - United States



Top Games by U.S. Downloads

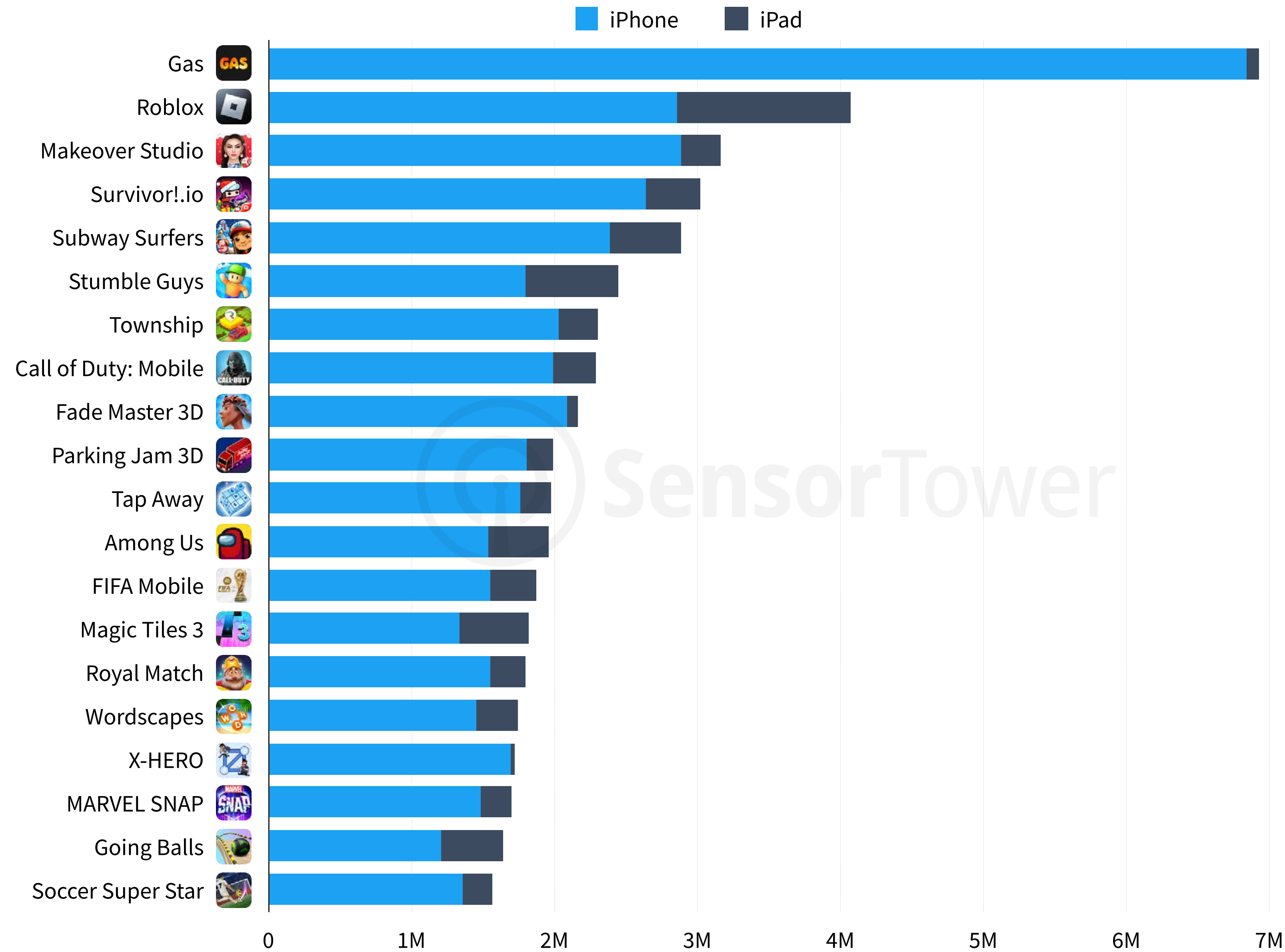
Gas, an anonymous guessing game popular among teens, grew 7,102 percent QoQ to become the number one game in the U.S. with over 6.9M downloads. Other top performing games such as Roblox, Subway Surfers, and Stumble Guys, by contrast, experienced a slight decline QoQ in Q4 2022.

ByteDance’s latest game, MARVEL SNAP, ranked within the top 20 games in Q4 2022 with over 2.8M downloads since its release in Q3 2022. MARVEL SNAP’s popularity exceeded top-charting games such as Candy Crush Saga, which placed 16th among the top 20.

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App Store - United States



Top Games by U.S. Downloads

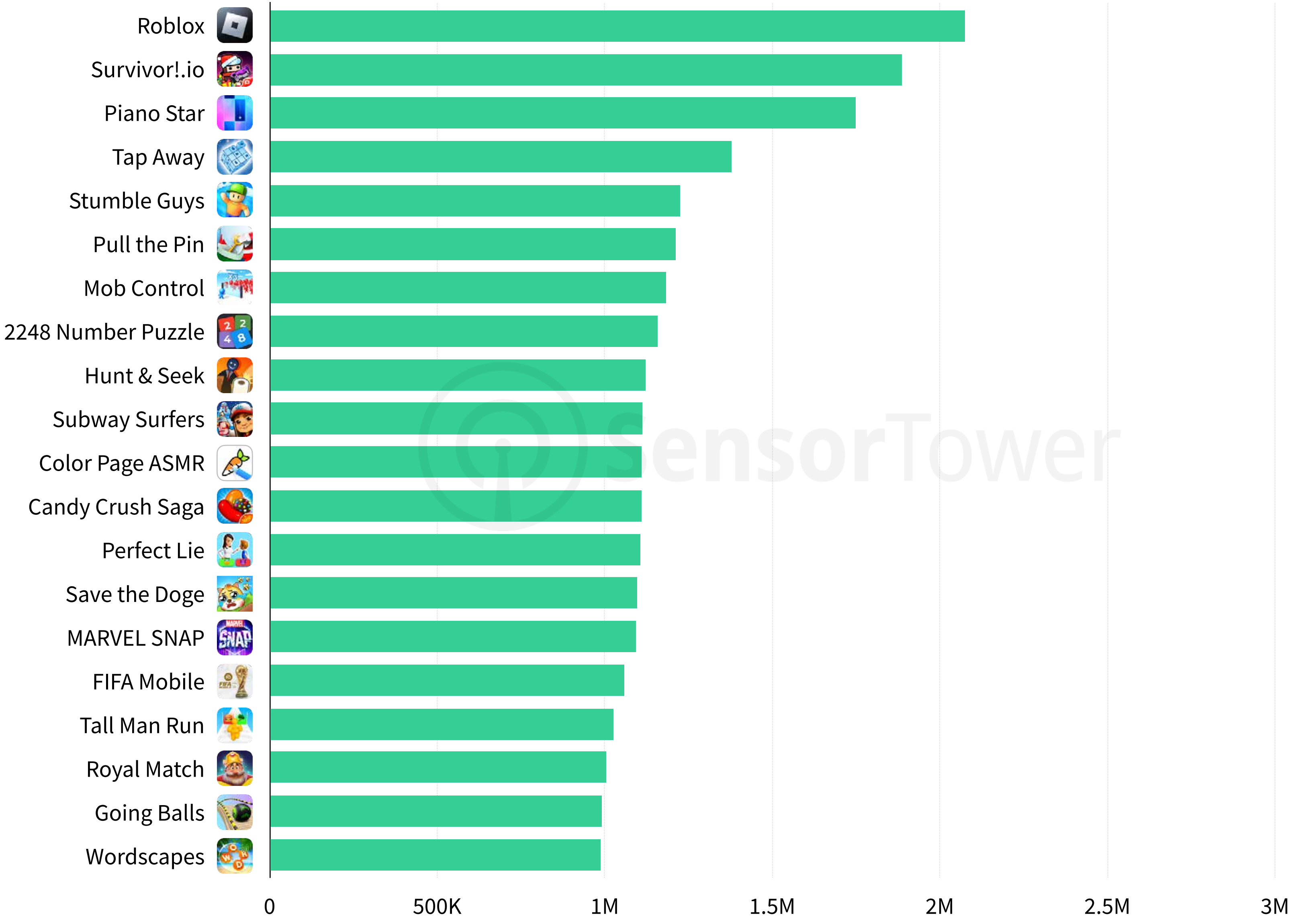
New games such as Gas, Makeover Studio, and MARVEL SNAP gained popularity in the U.S. In particular, Gas grew 7,102 percent QoQ, while Makeover Studio grew 2,035 percent QoQ, placing both titles among the fastest growing games in the U.S. App Store in Q4 2022.

Following the hype around the World Cup, football games including FIFA Mobile and Soccer Super Star grew in popularity in the U.S. FIFA Mobile downloads grew 196 percent QoQ, while Soccer Super Star grew 368 percent QoQ.

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Google Play - United States



Top Games by U.S. Downloads

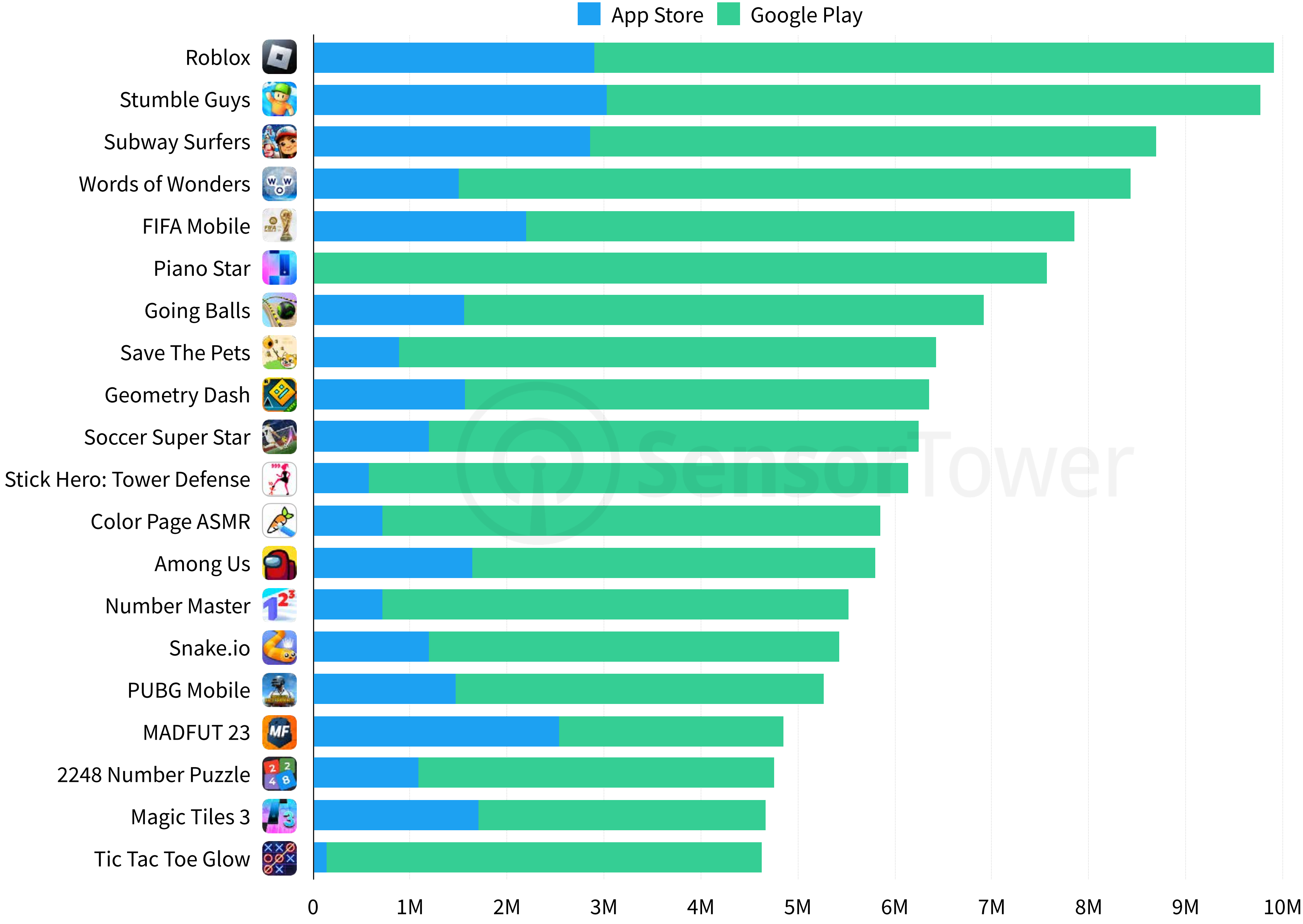
Roblox dominated Google Play downloads as it made consistent growth each quarter in 2022, concluding with over 2M downloads in Q4 2022. Among the top 5 games, Roblox and Survivor!.io ranked as the top games under the Adventure genre.

Among the top 10 games, 4 were in the Puzzle genre, while the remaining were in Adventure, Arcade, and Action. Meanwhile, Piano Star and Hunt & Seek were the only games in the Music and Casual genres, respectively.

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Overall - Europe



Top Games by European Downloads

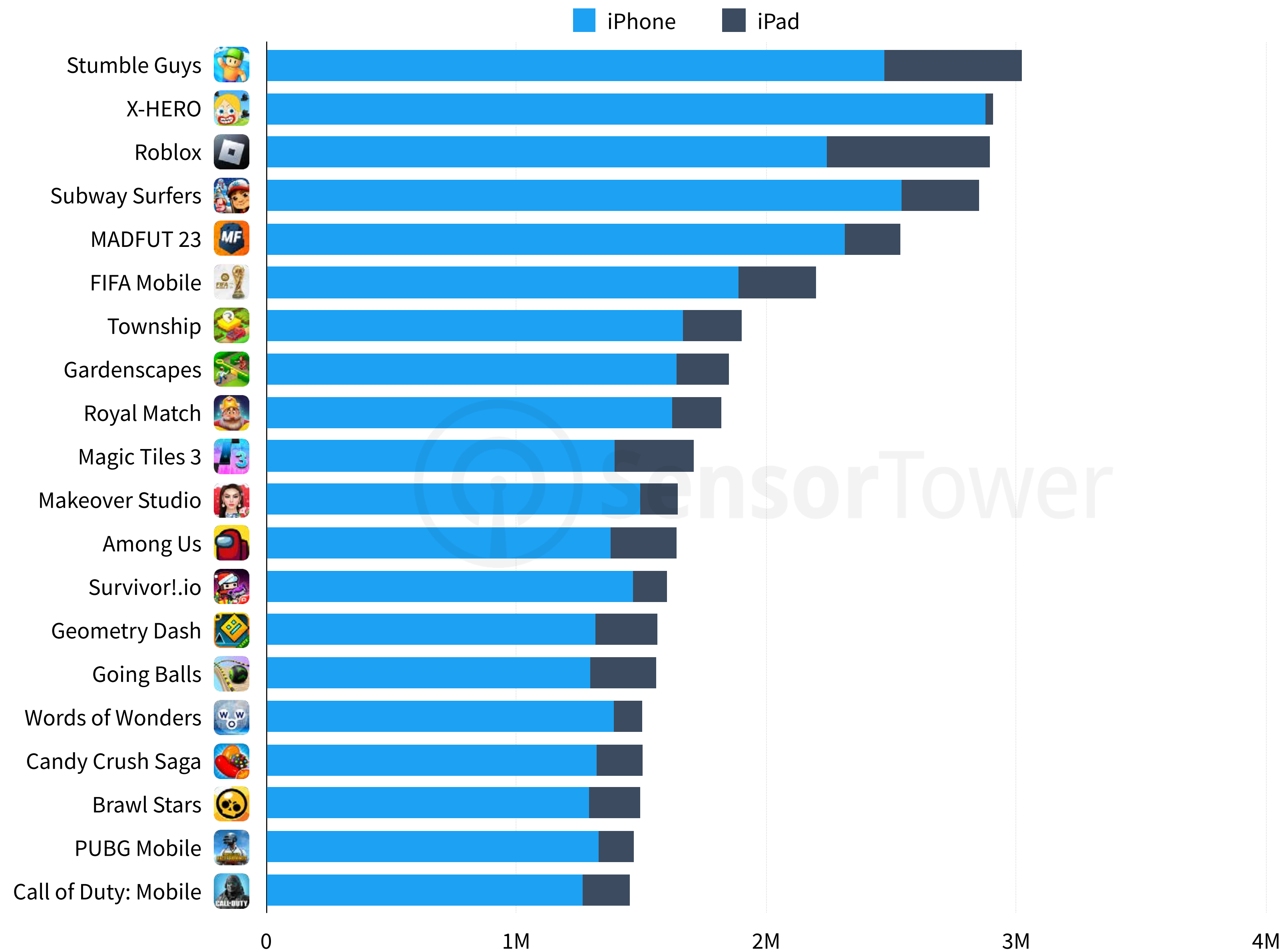
Roblox led European downloads globally with their best quarter of 2022 at 9.9M downloads. Among all European countries, Russia showed the greatest app adoption for Roblox, accounting for 25 percent of all downloads.

New games released in 2022 such as Piano Star and Save the Pets surged in popularity within the span of a few months. Piano Star and Save the Pets grew 782 percent and 1,183 percent QoQ, respectively.

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App Store - Europe



Top Games by European Downloads

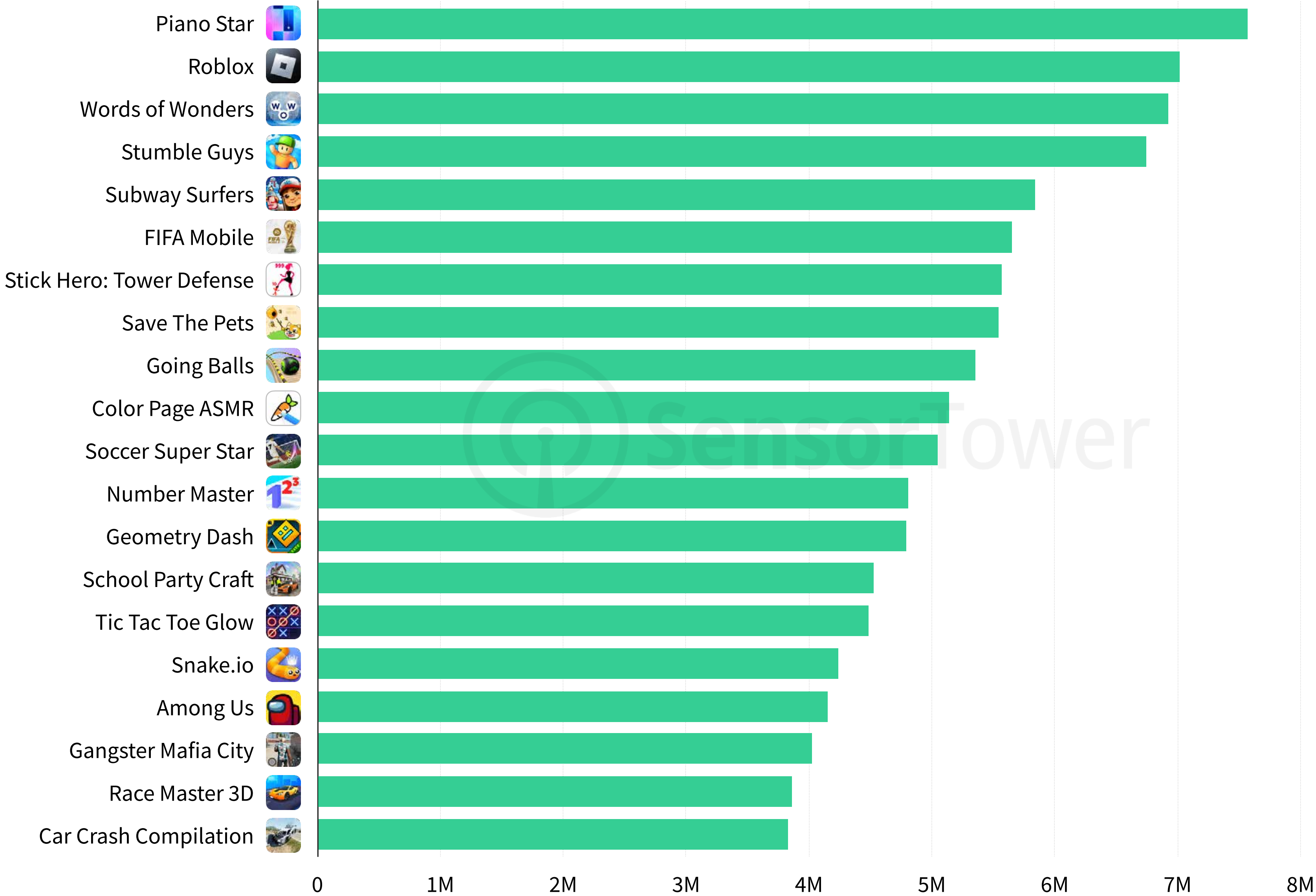
Stumble Guys ranked as the number one game in Europe since Q3 2022. Stumble Guys dethroned Subway Surfers, Europe's previous number one game on the App Store in Q3 2021, and has maintained this position ever since.

Newly released titles in 2022 such as Makeover Studio and Survivor!.io ranked among the top 20 apps, at number 11 and number 13 respectively. The majority of app adoption for Makeover Studio came from the U.K. at 24 percent, while Survivor!.io saw 18 percent of its app adoption in Germany.

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Google Play - Europe



Top Games by European Downloads

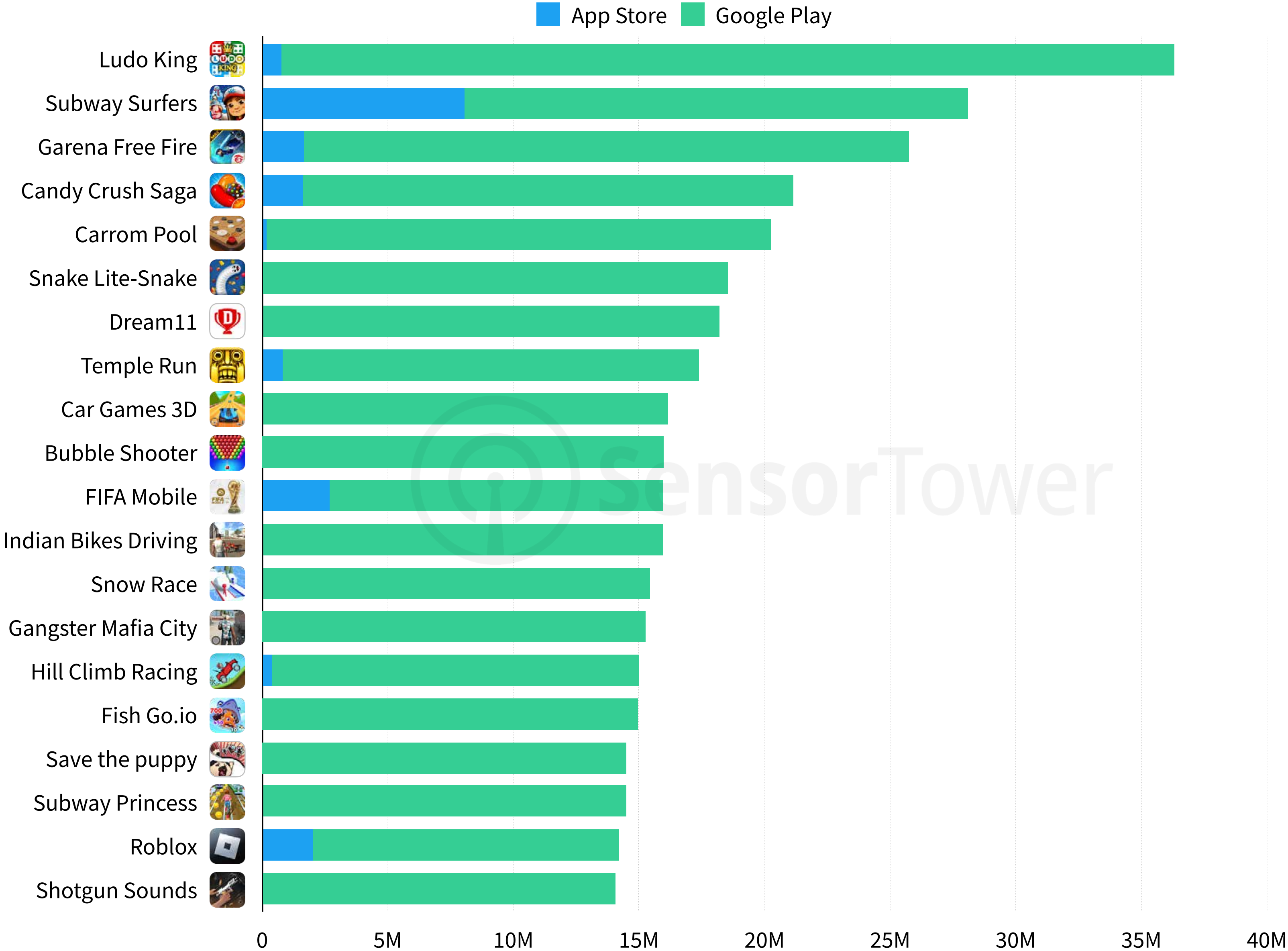
Several newly released games in 2022 reached the top 10 for Europe, supplanting titles such as Roblox and Subway Surfers. Among the new games, Piano Star placed at number one, Stick Hero placed at number seven, and Save the Pets and Color Page ASMR placed at number 8 and 10, respectively.

Among the top ten games, Save the Pets saw the highest growth at 1,007 percent QoQ since its launch in Q3 2022. Russia held 60 percent of its download share in Q4 2022.

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Overall - Asia



Top Games by Asia Downloads

Ludo King generated over 36M downloads, with 89 percent of global downloads occurring in Asia. India, which has been the leading Asian country since the app's launch in 2016, accounted for 76 percent of Ludo King's app adoption.

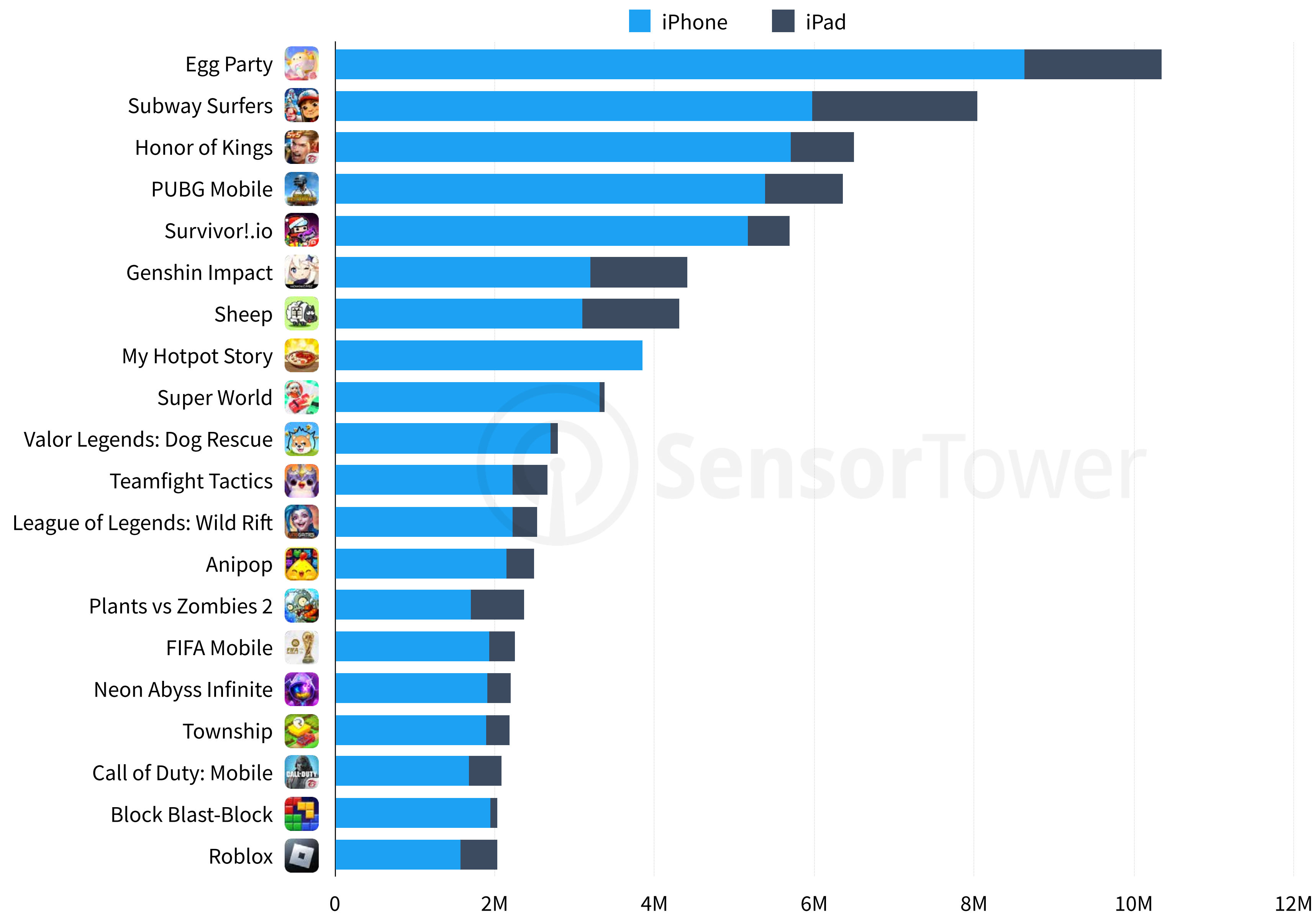
Dream11, a fantasy cricket game, debuted in Q4 2022 to the top 10 games in Asia with over 18M downloads, ranking above hit titles such as Temple Run and Bubble Shooter.

Among all Asian countries, India was responsible for 100 percent of all downloads during its release.

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App Store - Asia



Top Games by Asia Downloads

Released in Q2 2022, Egg Party debuted as the number one App Store game in Asia with over 10M downloads, topping popular titles such as Honor of Kings and PUBG Mobile.

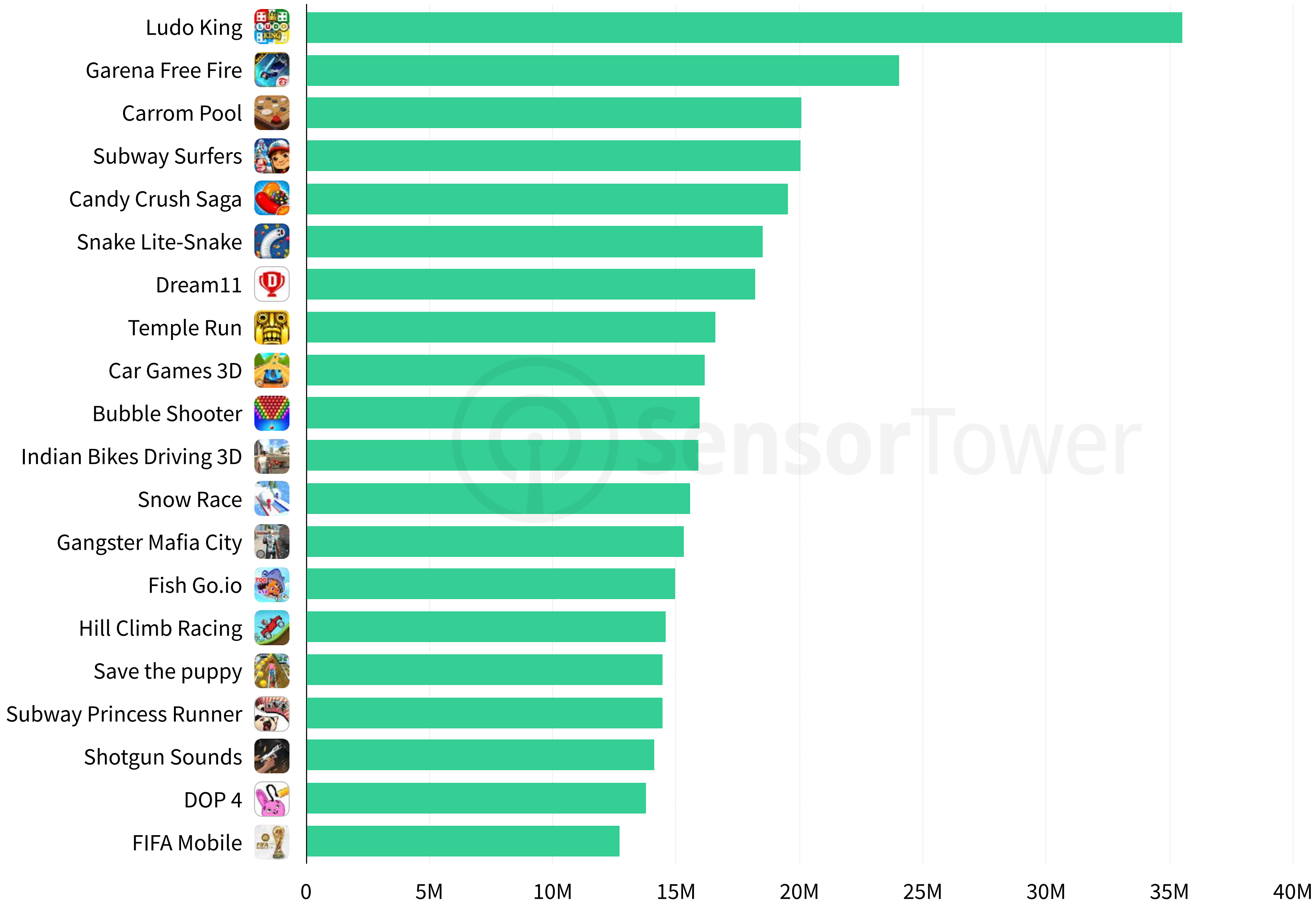
Egg Party downloads increased 161 percent QoQ.

Half of the top 10 games from Q4 2022 were new titles that released in Q2 2022 and Q3 2022. In particular, Q2 2022 witnessed the release of Egg Party, Survivor!.io, and My Hotpot Story, which placed at No.1, No. 5, and No. 8, respectively. Super World and Valor Legends placed at No. 9 and No. 10, respectively.

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Google Play - Asia



Top Games by Asia Downloads

Ludo King led in Google Play installs with over 35M in Q4, with Google Play installs accounting for 98 percent of overall downloads across both stores. In the Asian market, India accounted for 77 percent of downloads, maintaining its lead since the first quarter of 2016.

Snow Race made its premiere in the top 20 Google Play games in Q4 2022 with over 15M downloads. Since its release in November, Snow Race app adoption was largely driven by India, which accounted for 66 percent of all downloads among Asian countries.

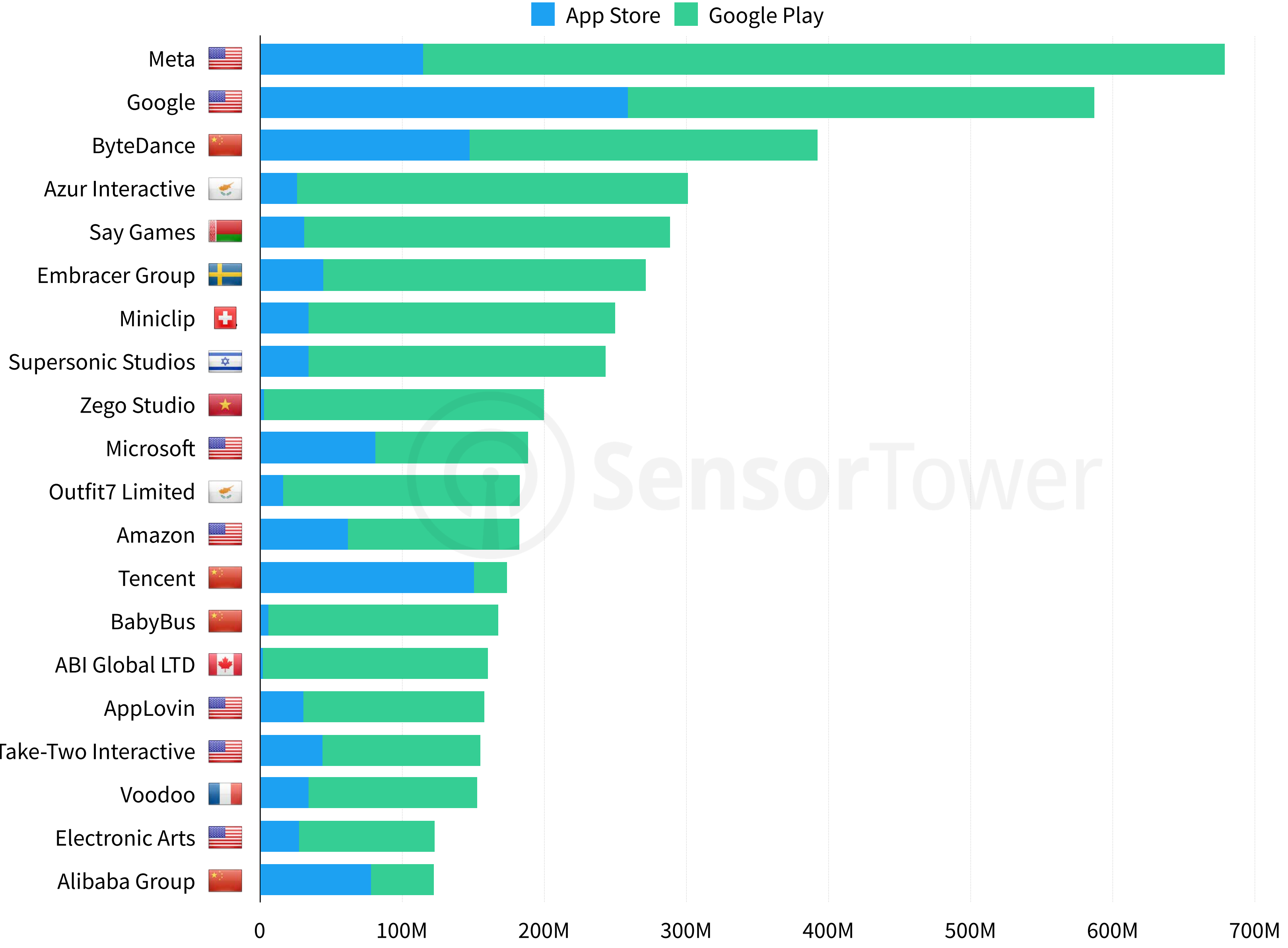
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Top Publishers

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Top Publishers by Downloads in Q4 2022

Overall - Worldwide



Top Publishers by Worldwide Downloads

Meta and Google took the lead worldwide in Q4 2022, with Meta taking the No. 1 position.

While Meta climbed 3 percent QoQ, Google declined more than one percent QoQ.

Microsoft climbed up one position each quarter, reaching No. 10 on the top 10 publishers worldwide in Q4.

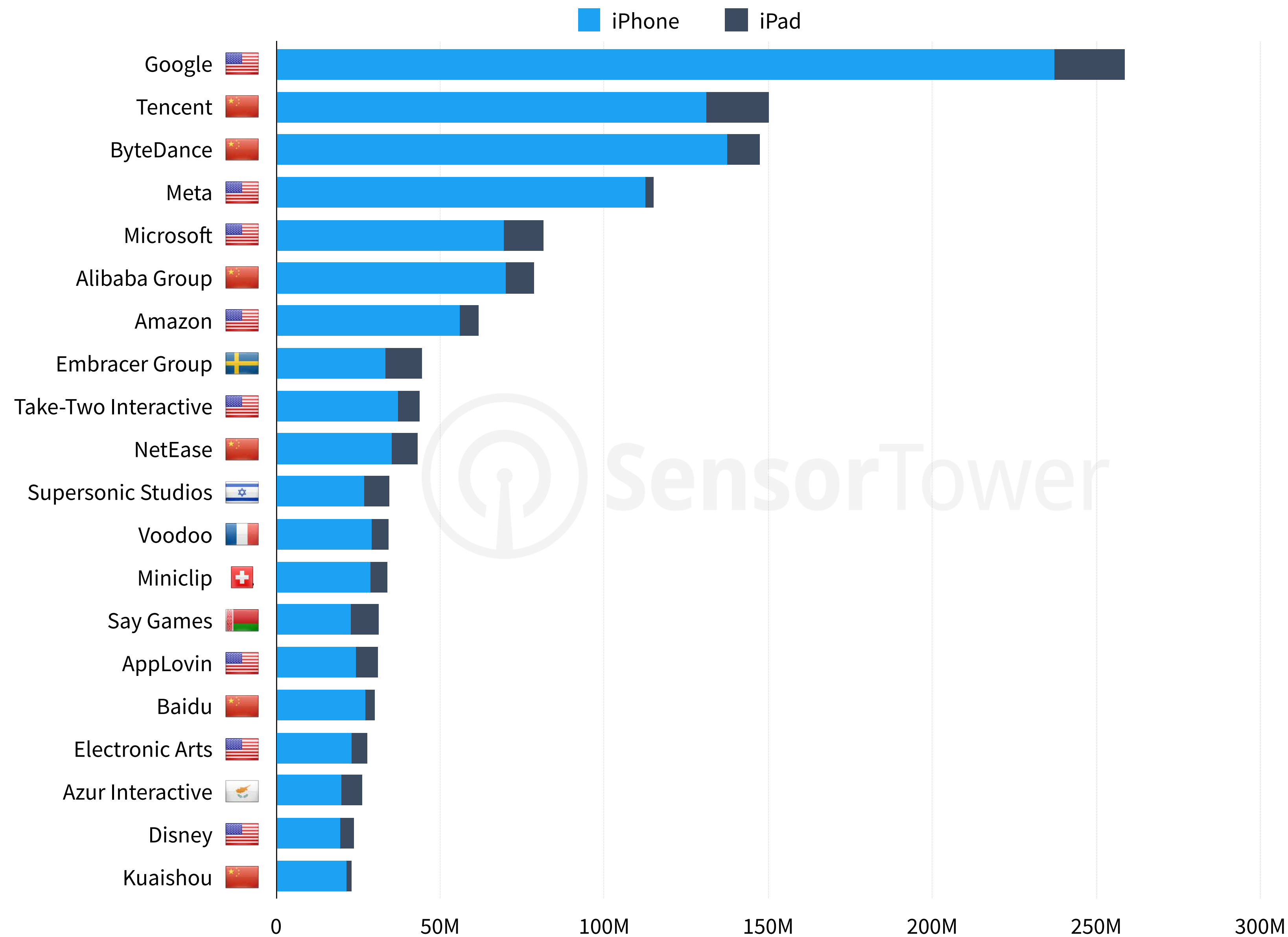
Microsoft generated over 187M downloads globally with 1 percent growth QoQ.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Oct. 1 through Dec. 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

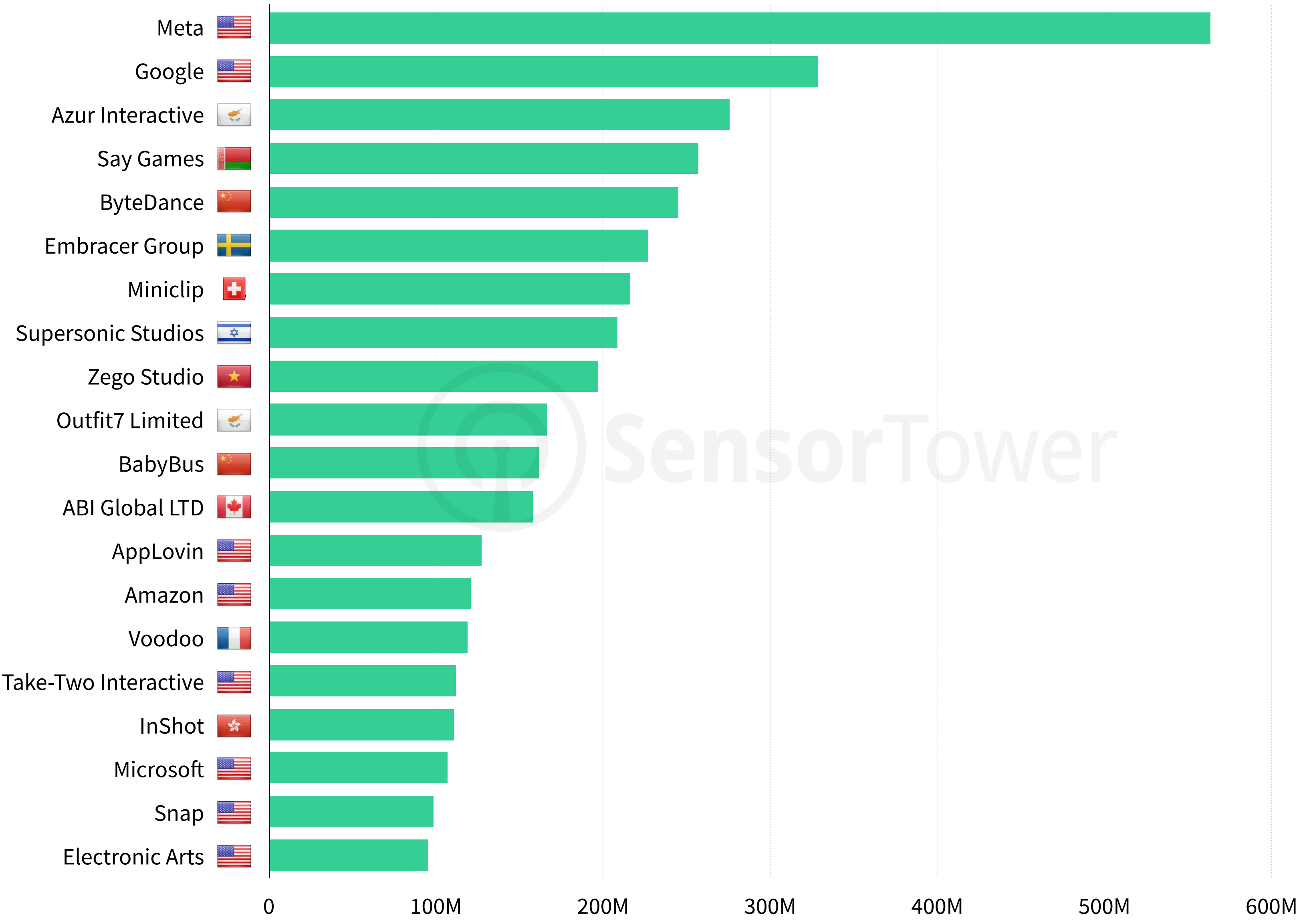
Google maintained its lead among publishers in the App Store, accruing over 250M downloads in Q4. Chinese publishers Tencent and ByteDance rounded out the top three.

The majority of the top 10 publishers worldwide in the App Store are based in the U.S. and China. In particular, U.S. and Chinese publishers claimed the top 7 spots, with the majority being U.S. publishers.

Note Regarding Download Estimates

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

Google Play - Worldwide



Top Publishers by Worldwide Downloads

Meta and Google held the top two spots for eight consecutive quarters, with Meta taking number one and Google coming in second.

Meta generated over 559M downloads, making Q4 2022 its third best performing quarter since Q1 2020.

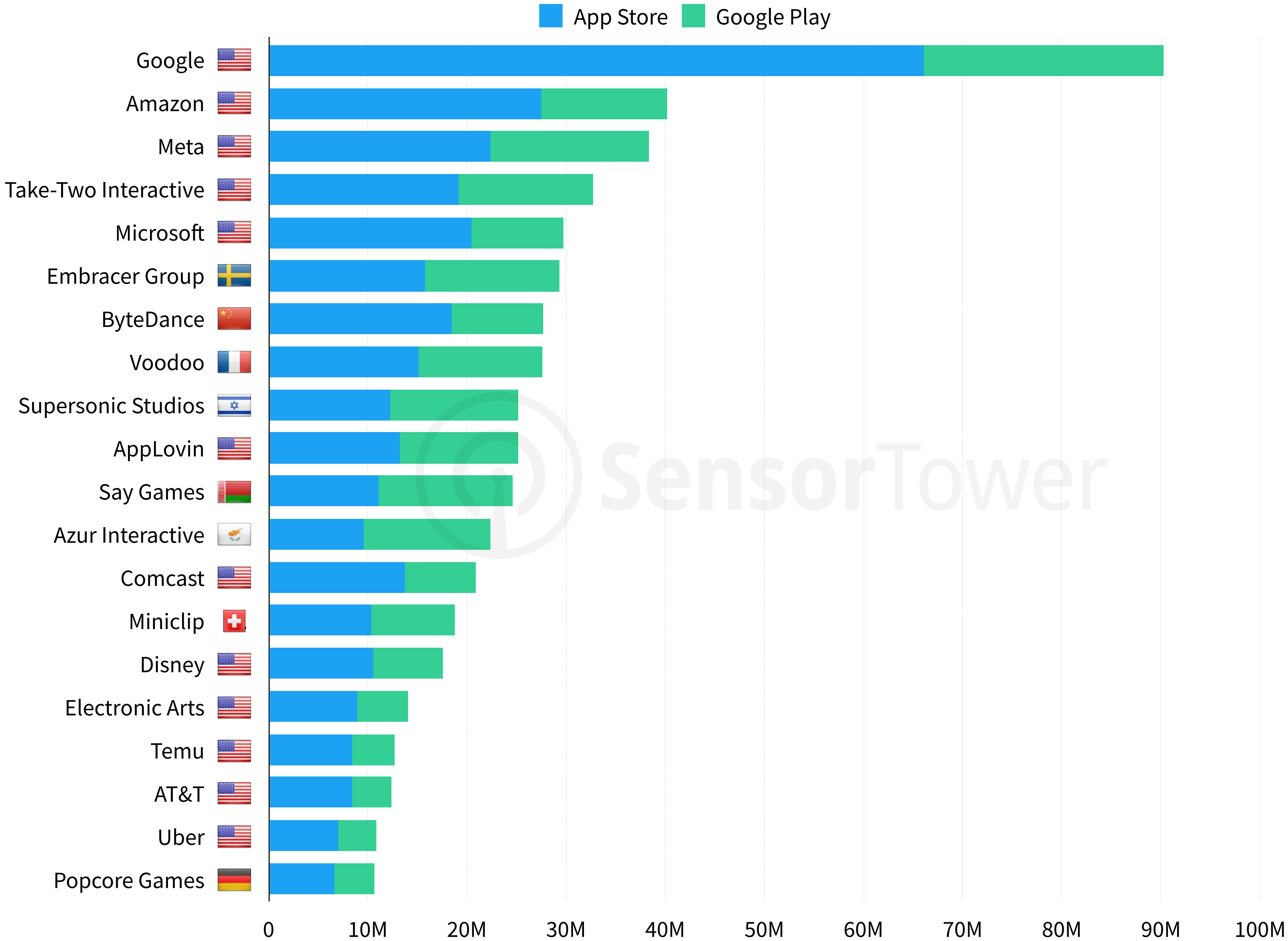
For the first time since Q2 2020, ByteDance ranked within the top 5 worldwide publishers on the Google Play store.

TikTok was responsible for 48 percent of ByteDance’s Q4 2022 downloads while CapCut accounted for 36 percent.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for Google Play for Oct. 1 through Dec. 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

U.S. based publishers lead the top 5 spots across both stores in the U.S. app market.

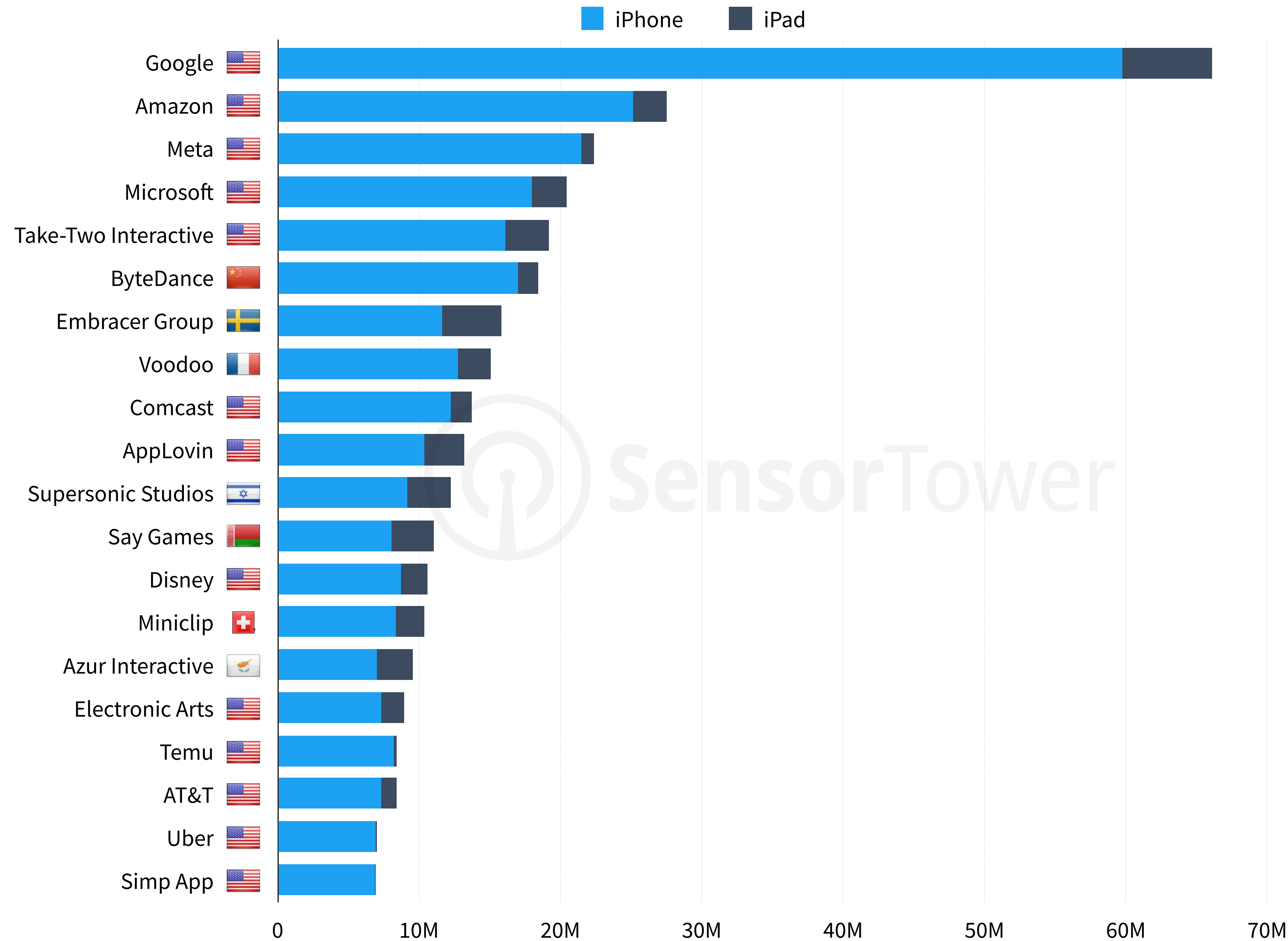
Google held the number one spot with over 90M downloads, a difference of 50M downloads from Amazon, which came in a distant second.

Microsoft ranked within the top 5 publishers for the first time since Q3 2017, placing at number 5 with publishers such as Meta, Amazon, and Google. Among all Microsoft apps, Microsoft Teams was the leading Microsoft app with over 14 percent of download shares.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Oct. 1 through Dec. 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 - United States



Top Publishers by U.S. Downloads

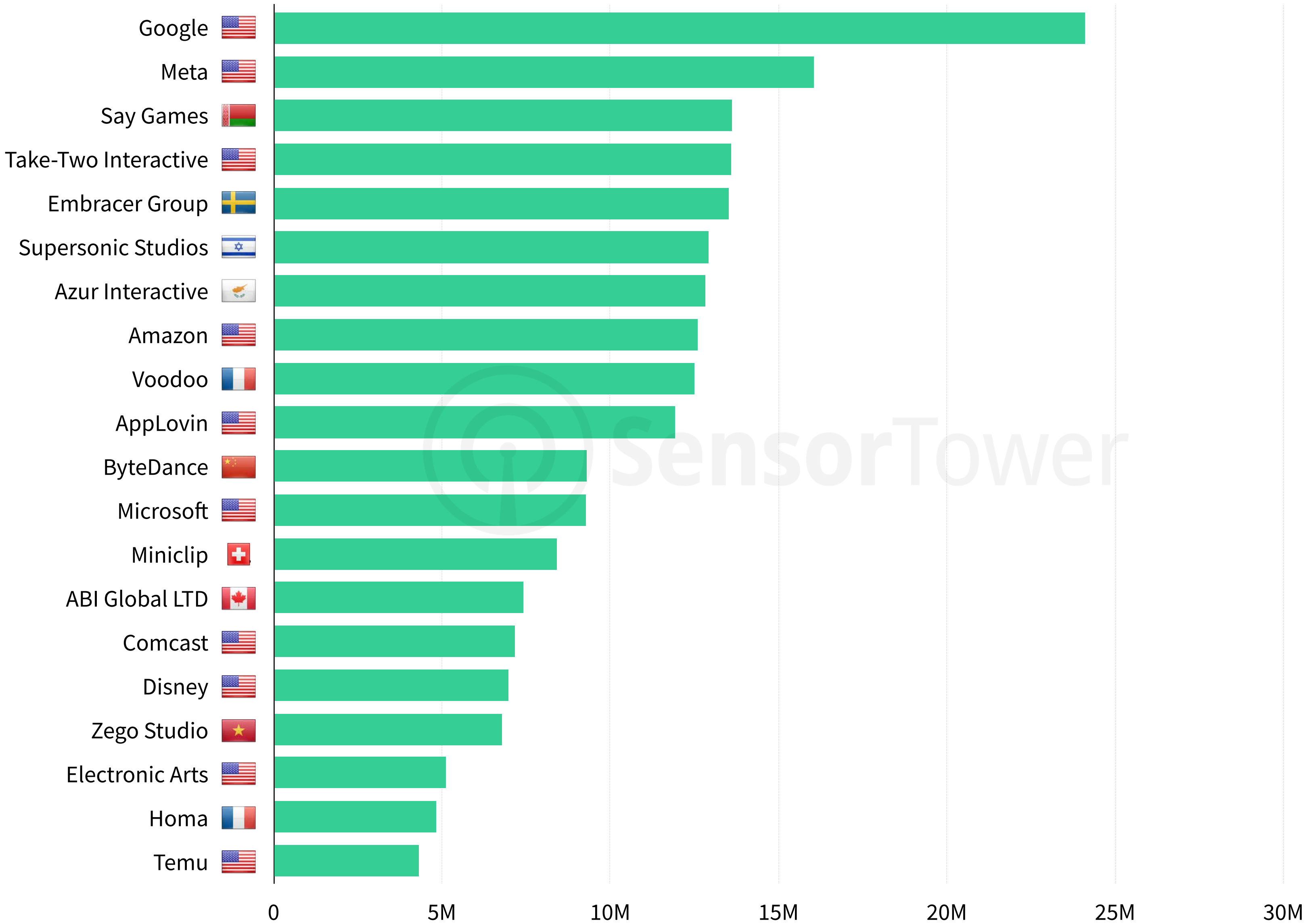
U.S. based publishers made up the top 5 publishers on the App Store. Google led with more than double Amazon's downloads, moving the latter to second place.

After maintaining a position within the top 6 since Q4 2020, Amazon finally reached second place in the U.S. App Store. Amazon has consistently maintained quarterly downloads above 25M in the third and fourth quarters of 2022, an achievement that has not occurred since Q1 2021.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Oct. 1 through Dec. 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

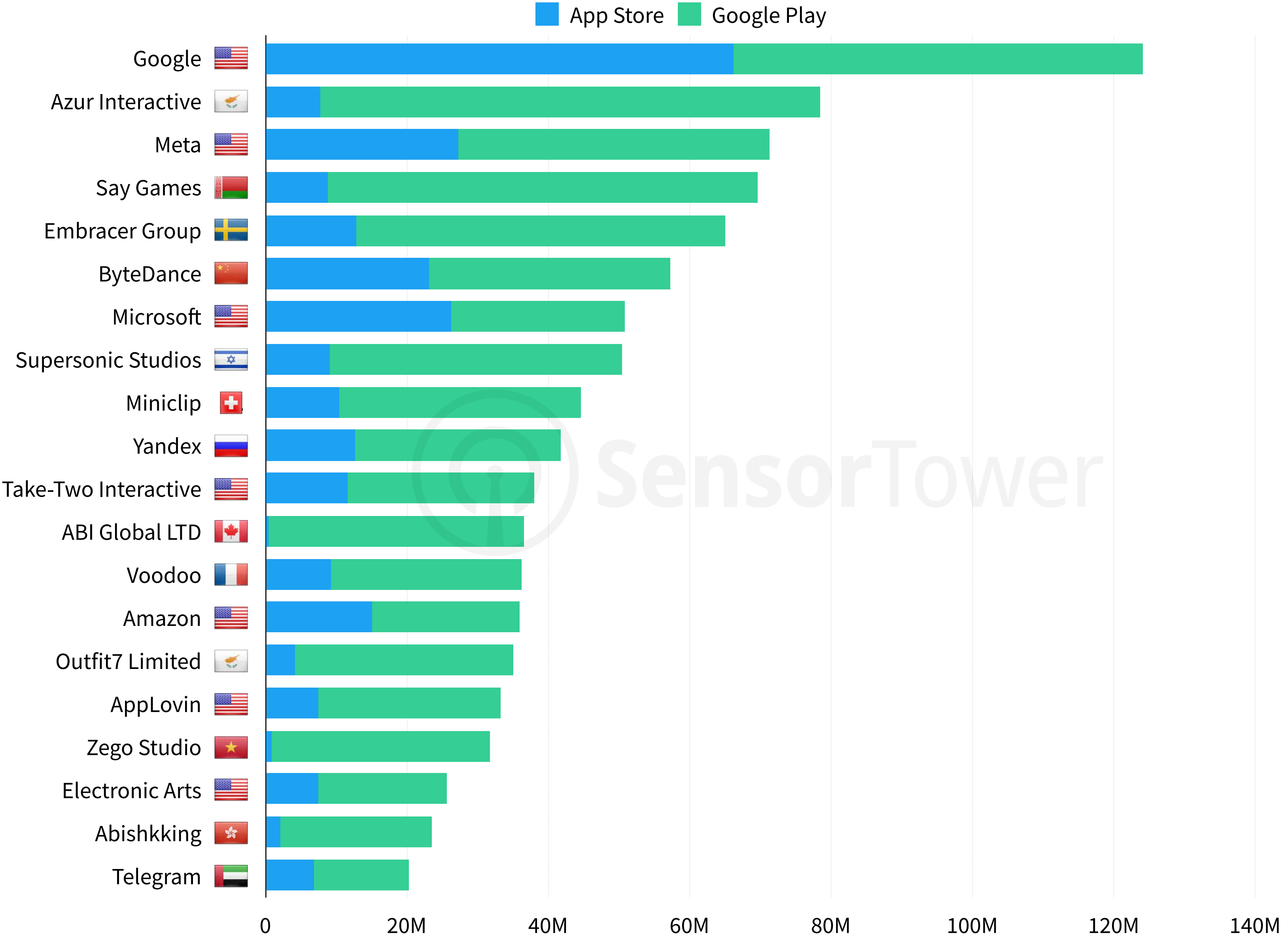
Meta became the publisher with the second most downloads on the Google Play store for the first time since Q2 2020. Among Meta publishers, Meta Platforms received 49 percent of downloads, WhatsApp received 27 percent, and Instagram received 20 percent.

Temu saw the greatest growth in downloads among the top 20 publishers with a 1,765 percent increase from Q3 2022. Temu’s popularity demonstrates the demand for B2B marketing in the mobile economy.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for Google Play for Oct. 1 through Dec. 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



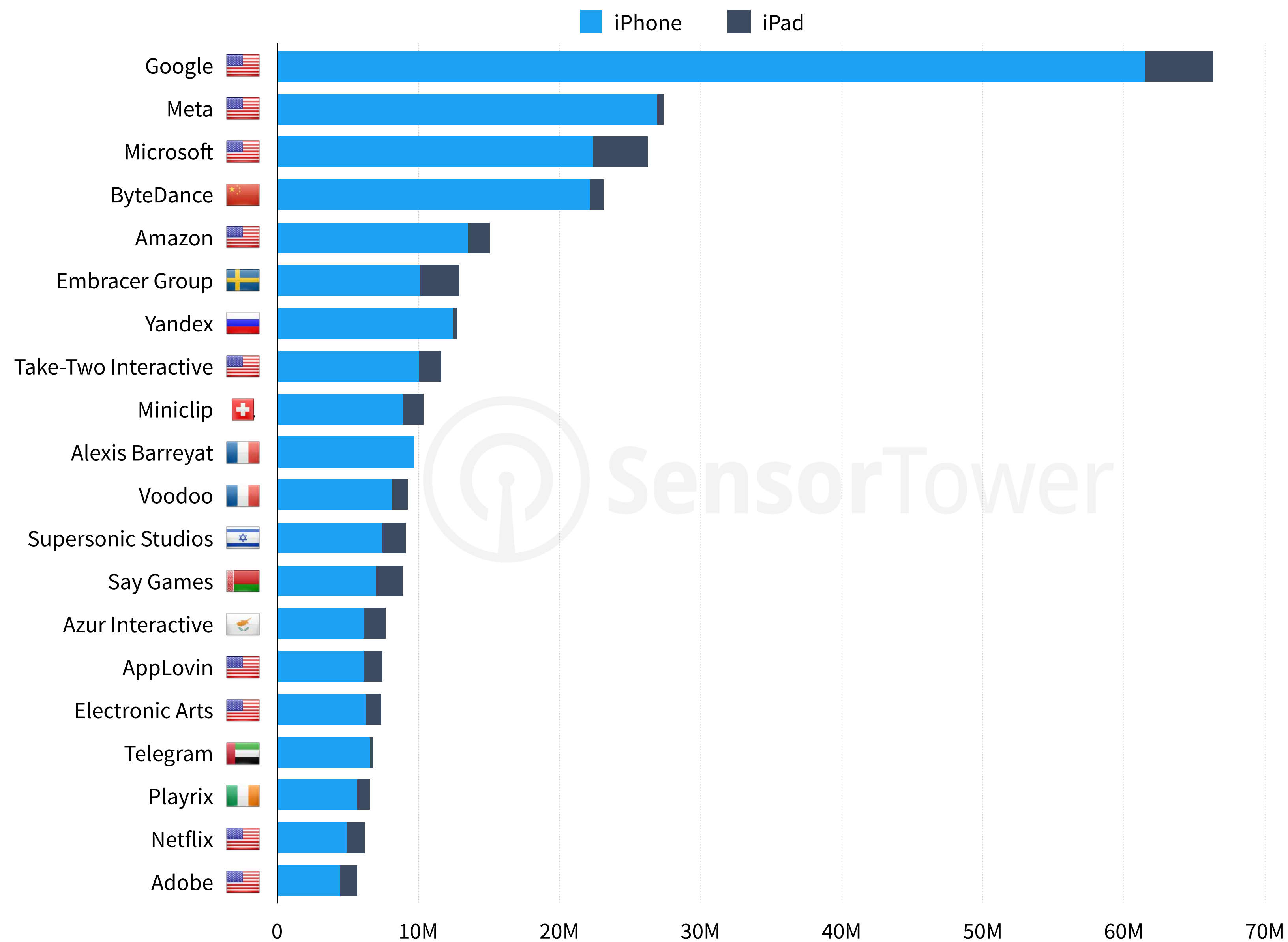
Top Publishers by European Downloads

Google ranked as the top publisher in Europe with over 124M downloads. Google saw nearly 1.6 times as many installs as Azur Interactive, which came in second, with over 78M downloads.

Azur Interactive remained in second place for two consecutive quarters since it moved up from the top 5 in Q2 2022. Azur Interactive saw popularity in Russia as it accounted for 29 percent of downloads in Q4 2022, while Turkey came in second sharing 17 percent.

Note Regarding Download Estimates
 Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Oct. 1 through Dec. 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 - Europe



Top Publishers by European Downloads

Google continued its dominance in Europe with over 122M downloads in the App Store.

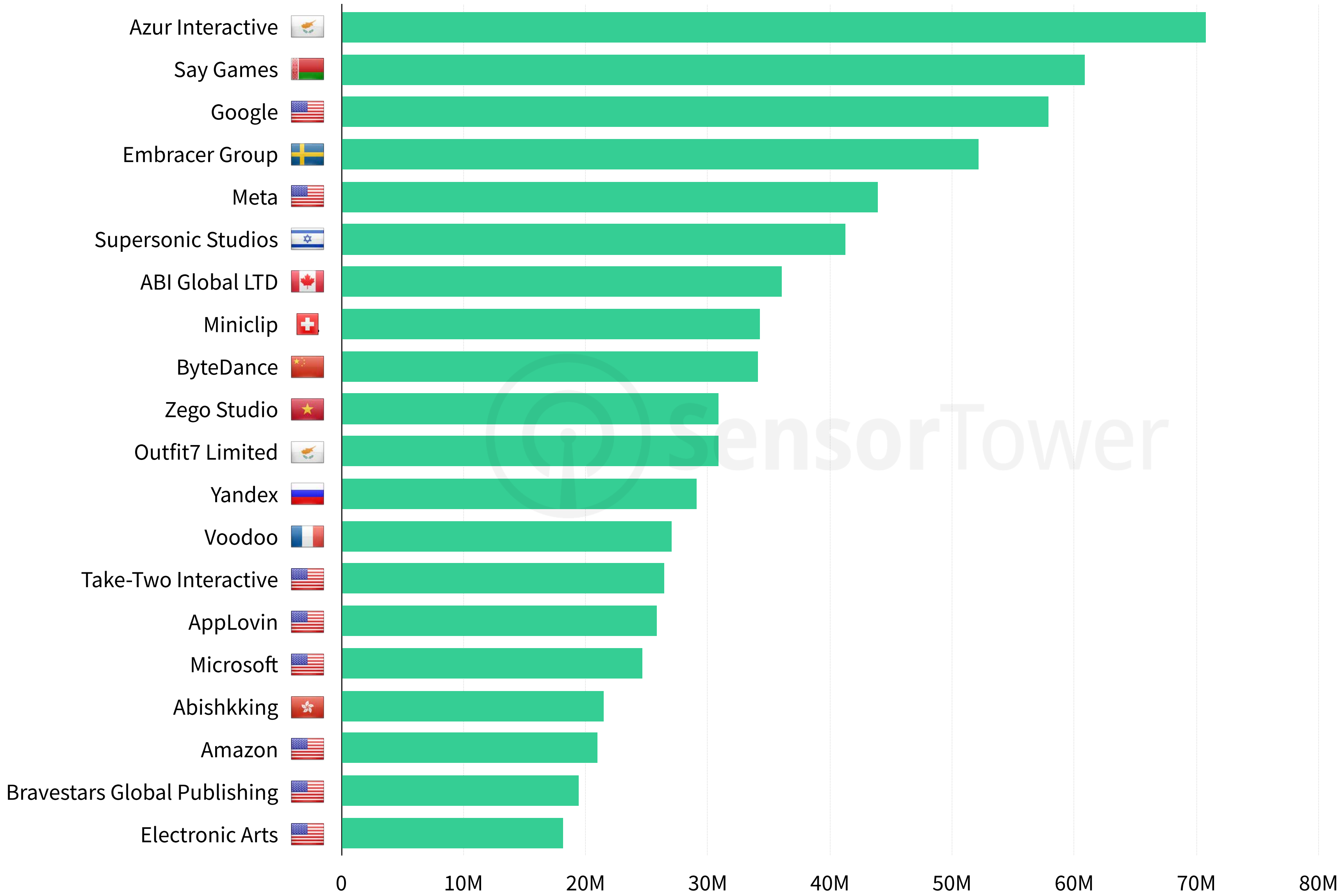
Among all apps published by Google, the Google app, YouTube, and Google Maps held the top 3 positions.

U.S. based publishers led European publisher downloads in the App Store. Four out of the top 5 U.S. publishers include Google, Meta, Microsoft, and Amazon. U.S. publishers account for 9 out of the top 20 publishers.

Note Regarding Download Estimates

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

Google Play - Europe



Top Publishers by European Downloads

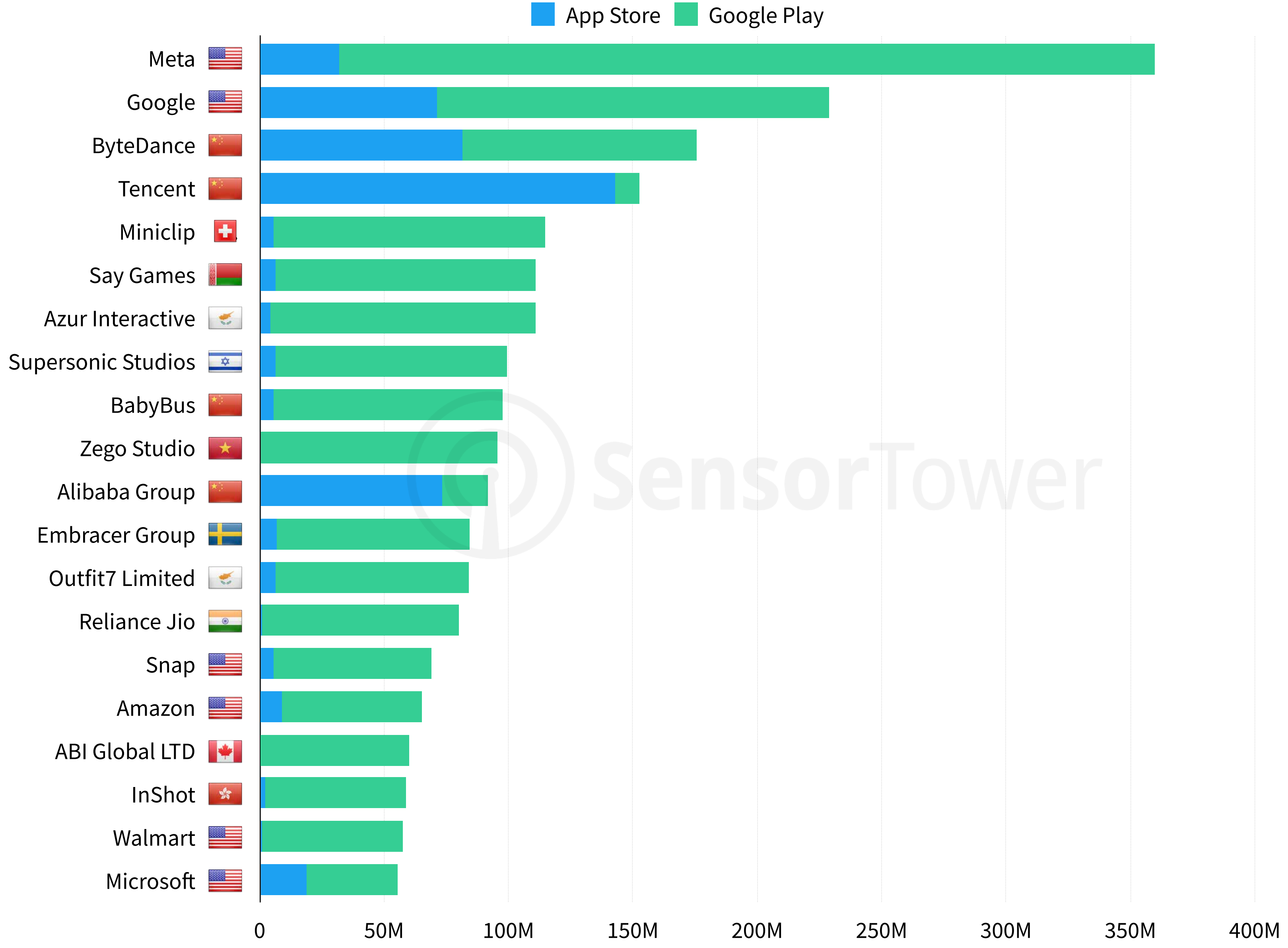
Azur Interactive led in Google Play publisher downloads for the second consecutive quarter since Q3 2022. Russia was the largest market for Azur Interactive apps, with over 30 percent download share, while Turkey had 18 percent.

Of the top 20 publishers in the European market, 13 out of 20 were publishers that focused on gaming. Although downloads for game publishers have decreased since their height near the pandemic, download growths have remained steady throughout 2022.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for Google Play for Oct. 1 through Dec. 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, Google, ByteDance, and Tencent took the top 4 positions in overall downloads, respectively, for four consecutive quarters.

Meta led the top publishers in Asia with over 360M downloads in Q4 2022, Meta’s best performing quarter in 2022.

Miniclip entered the top 5 publishers in Asia, topping Supersonic Studios at number 5.

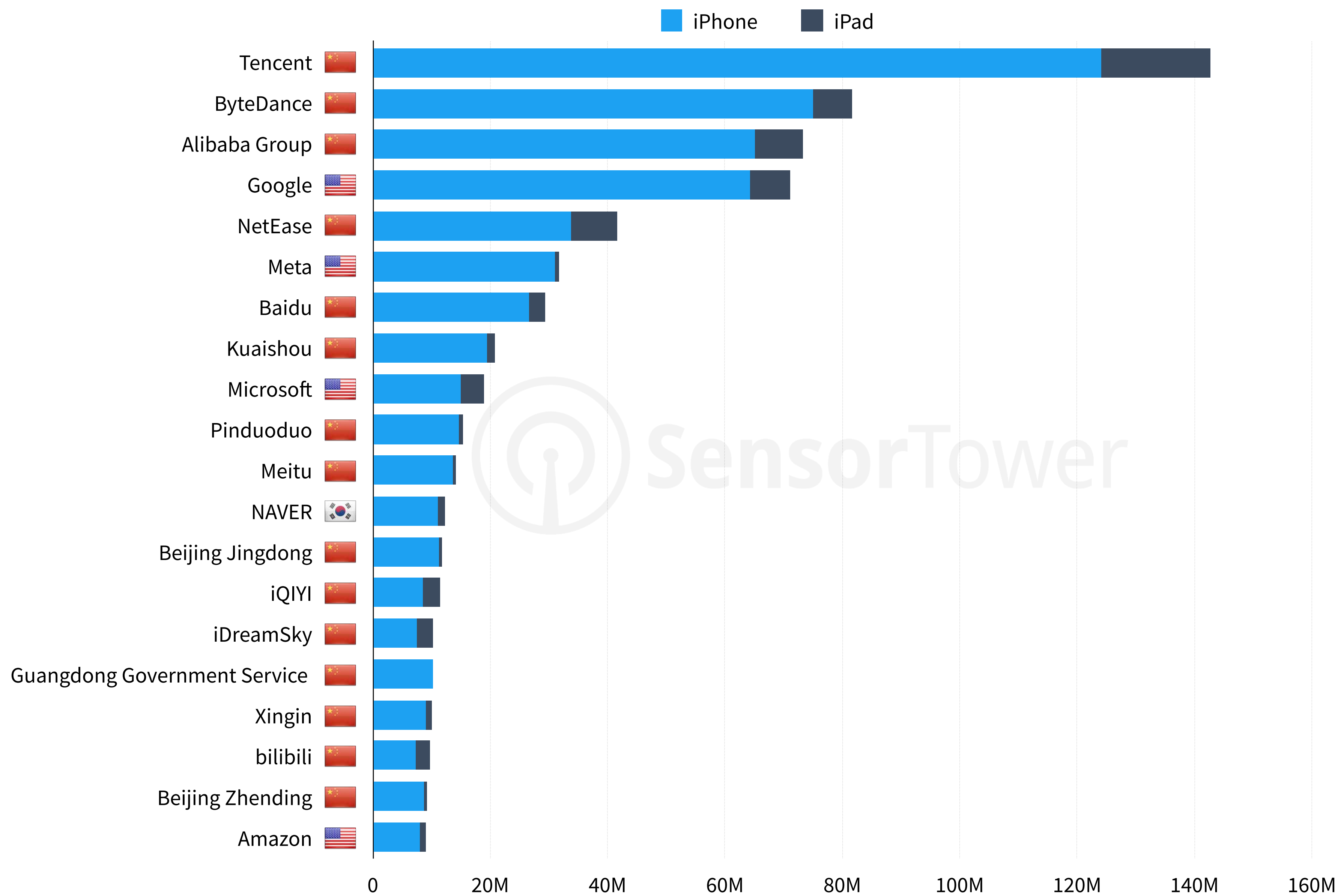
India was Miniclip’s most popular market, accounting for a 57 percent share of downloads in Asia. Subway Surfers was Miniclip’s most popular app with over 18 percent of downloads from Miniclip published games.

Note Regarding Download Estimates

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App Store - Asia



Top Publishers by Asia Downloads

Tencent was the leading publisher with over 142M Asian App Store downloads.

ByteDance, the second leading publisher, generated over 81M downloads, 61M installs behind Tencent.

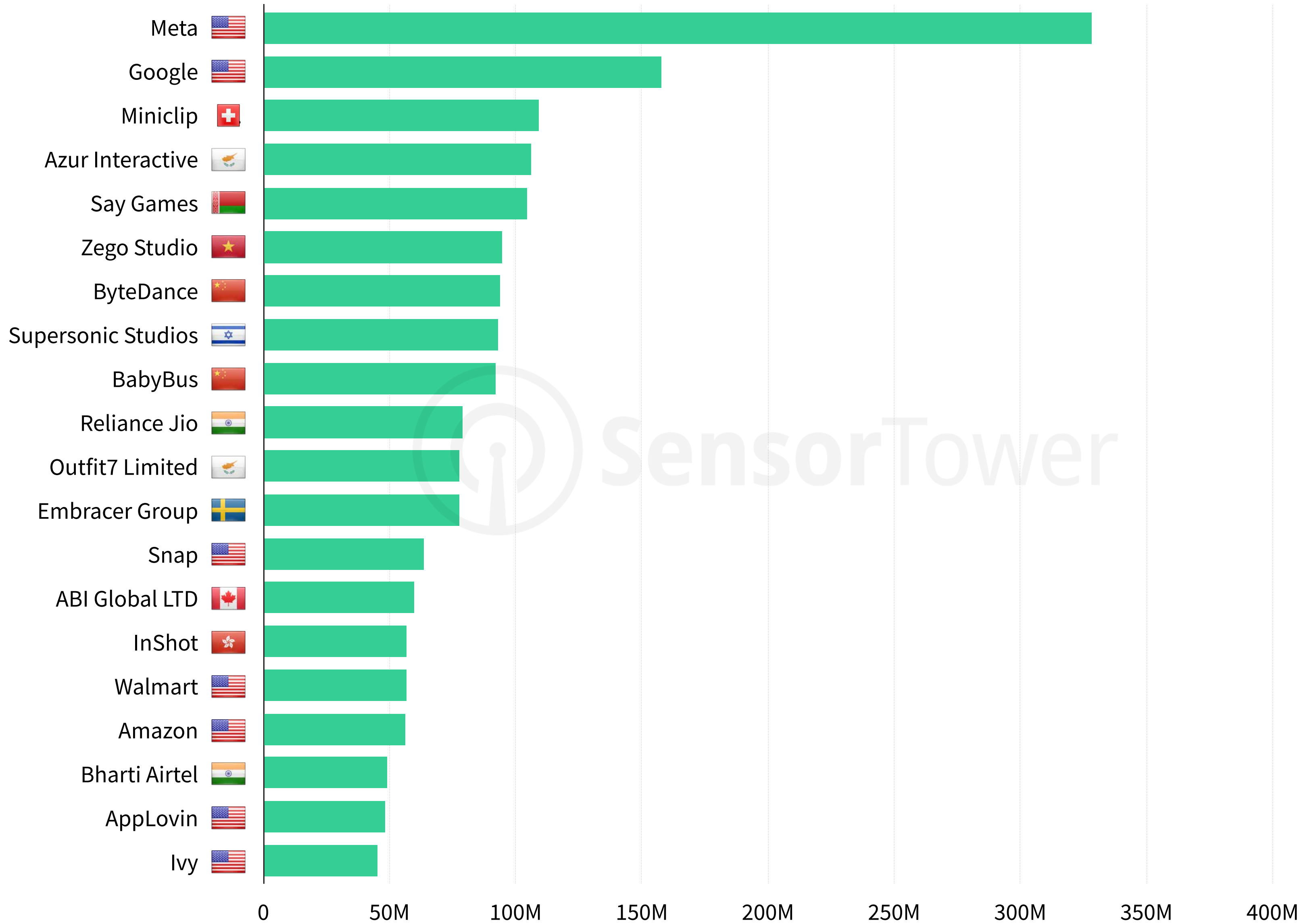
Chinese publishers accounted for 15 out of the top 20 publishers in Asian App Store downloads.

Among the top 20 publishers, China was the largest market, accounting for 73 percent of download shares in Asia, while Japan came in second with 5 percent of shares.

Note Regarding Download Estimates

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

Google Play - Asia



Top Publishers by Asia Downloads

Meta generated over 328M Google Play downloads in Asia, where Google Play accounted for 91 percent of Meta downloads across both stores. Throughout 2022, Instagram was the most popular Meta app, holding a 31 percent share of all Google Play Meta downloads while Facebook came in second with 26 percent. India was Meta’s most popular market holding 61 percent of download shares.

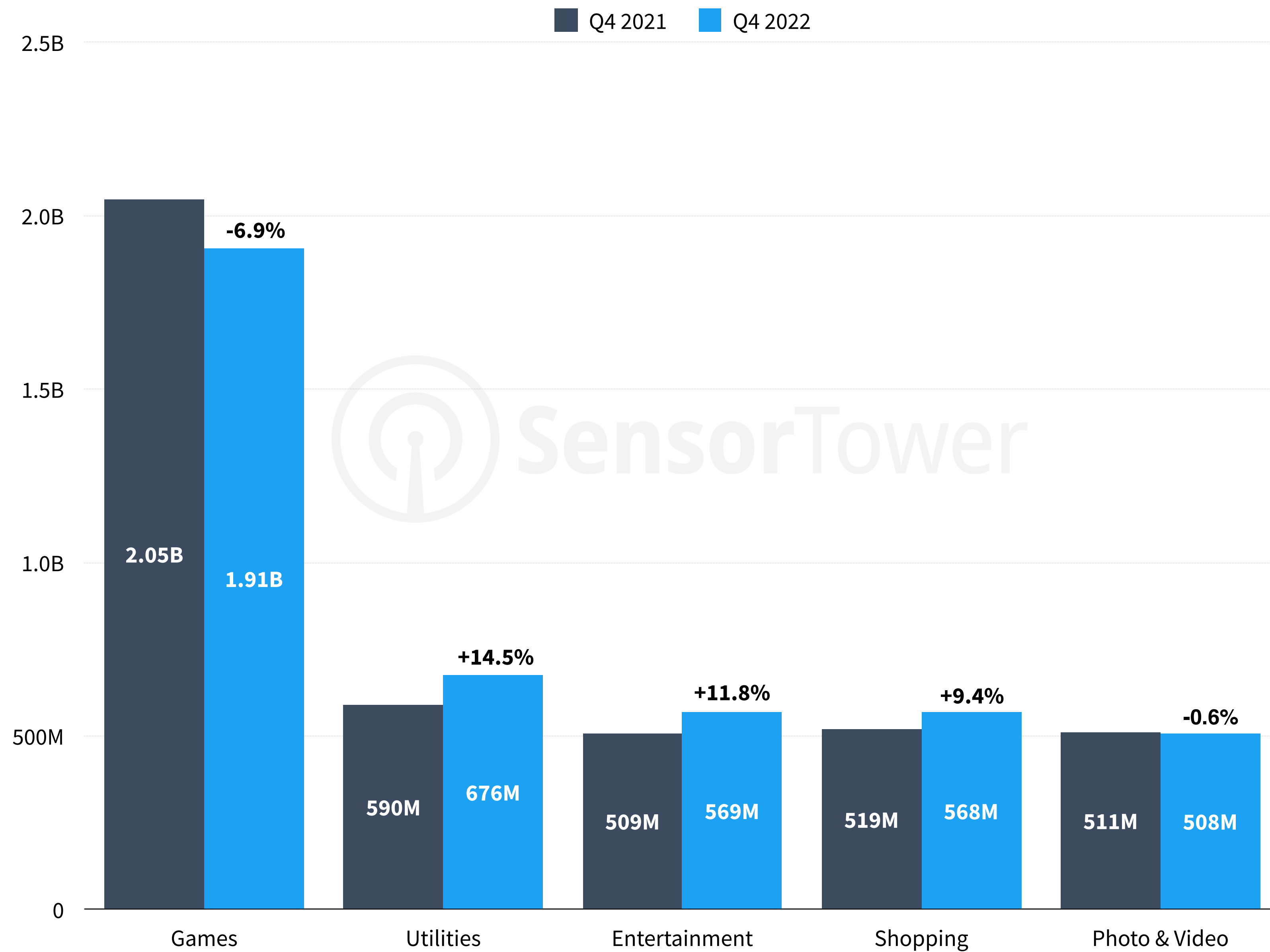
Zego Studio climbed 4 places after being in 10th place since Q1 2020. Zego Studio games such as Gangster Mafia City and Car Games 3D were the most popular games of Q4 2022, both growing 328 percent and 64 percent QoQ, respectively.

Note Regarding Download Estimates
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Top Categories

—
Top Categories by Downloads in Q4 2022

App Store



Top Categories by Worldwide Downloads

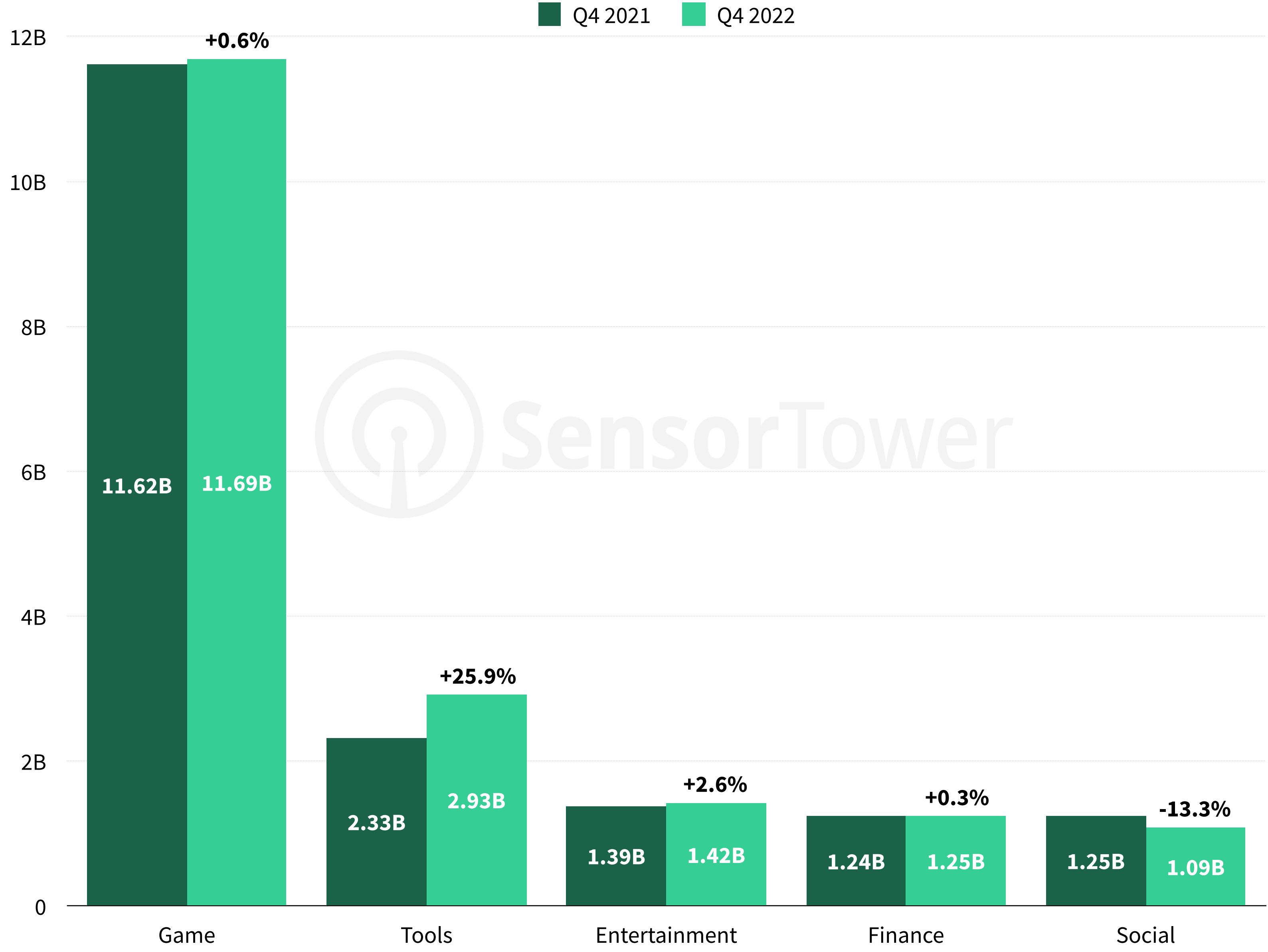
Despite a 6.9 percent decline year-over-year, the Game category has remained dominant, responsible for almost three times as many installs as the No. 2 Category, Utilities. Mobile game downloads have dipped below 2B for the first time since Q1 2019.

At 14.5 percent, the Utilities category saw the highest growth among the top five App Store categories of 2022. The Utilities category has not seen a year-over-year growth under four percent in any quarter since Q1 2020.

Note Regarding Download Estimates

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

Google Play



Top Categories by Worldwide Downloads

In contrast to the App Store, mobile game downloads increased year-over-year on Google Play to nearly 11.7B . The Game category on Google Play was responsible for more installs than all categories on the App Store combined.

Non-Game categories saw over 15.8B installs in Q3 2022, down 1.5 percent year-over-year. Despite this, the Tools category, the counterpart of the Utilities category on the App Store, saw an impressive 25.8 percent Y/Y growth in downloads. It was the third fastest growing category in Q4 2022.

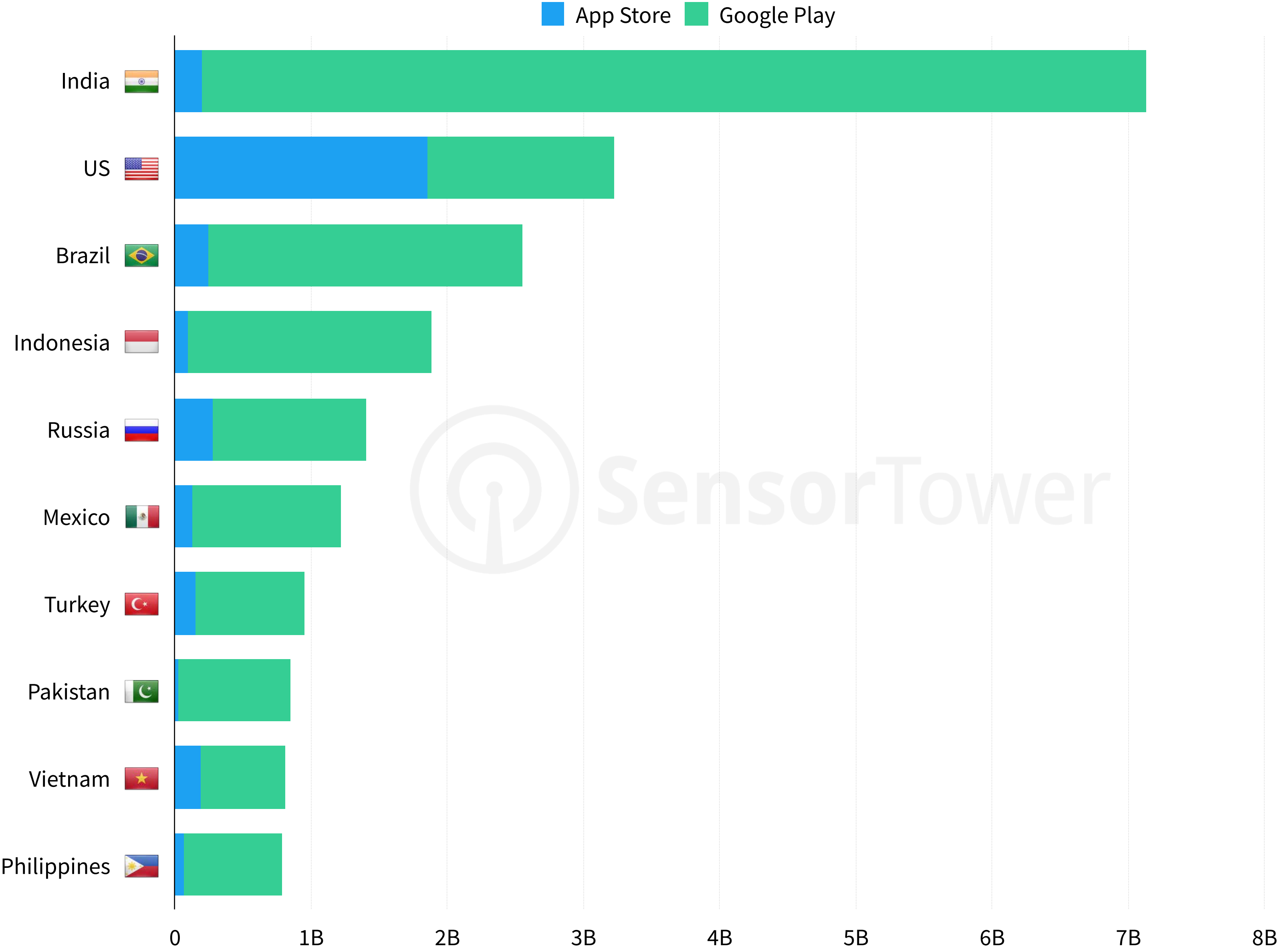
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Top Markets

—
Top Markets by Downloads in Q4 2022

Overall



Top Markets by Downloads

India saw over 7B installs, up seven percent year-over-year. The vast majority of these came from Google Play, a trend seen in all of the top ten markets with the exception of the U.S.

Vietnam saw installs fall to 808M, a 13 percent decrease Y/Y. This allowed both Turkey and Pakistan to move up one rank each to the No. 7 and No. 8 place, respectively.

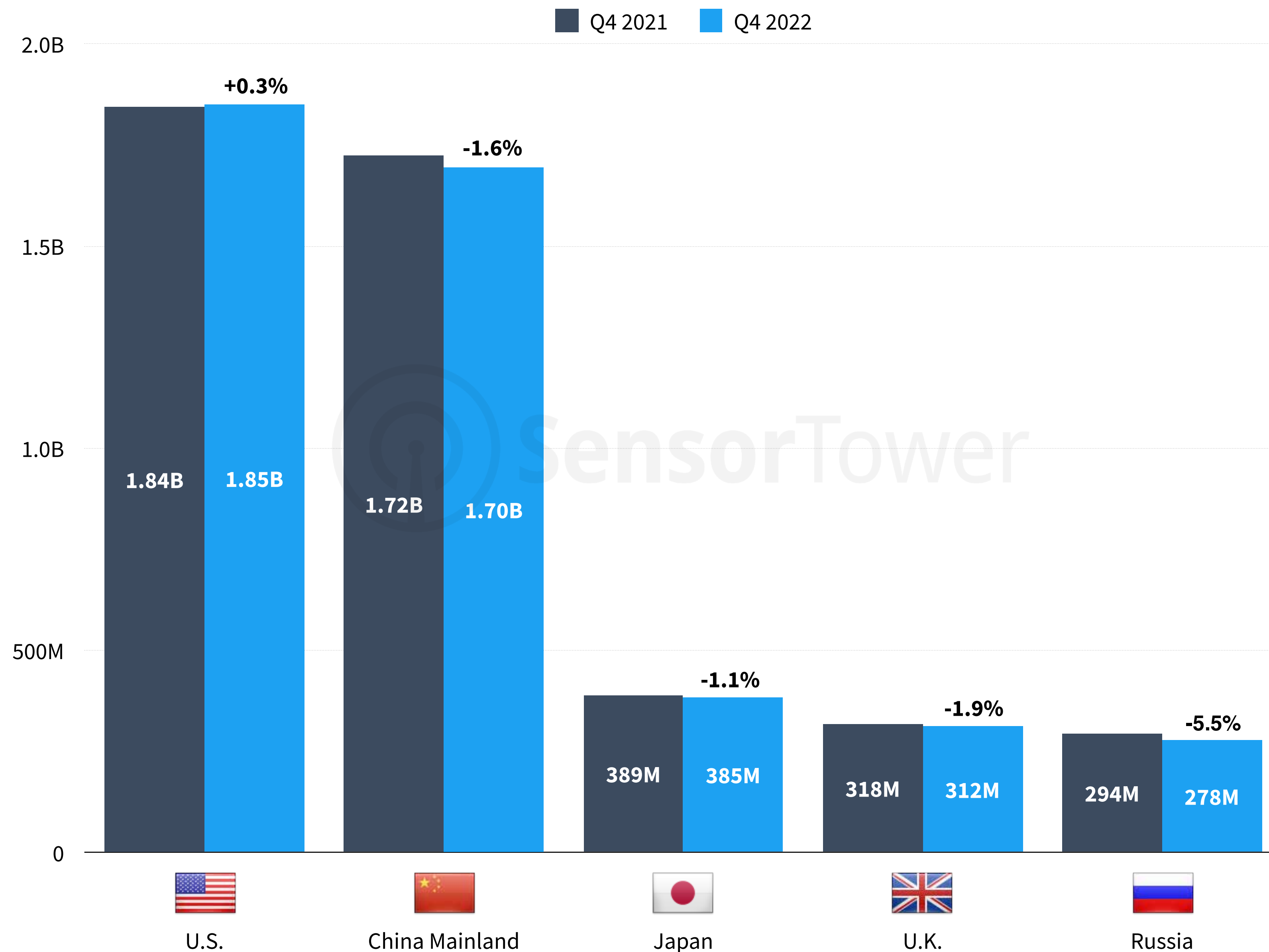
Note Regarding Download Estimates

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



App Store



Top Markets by Downloads

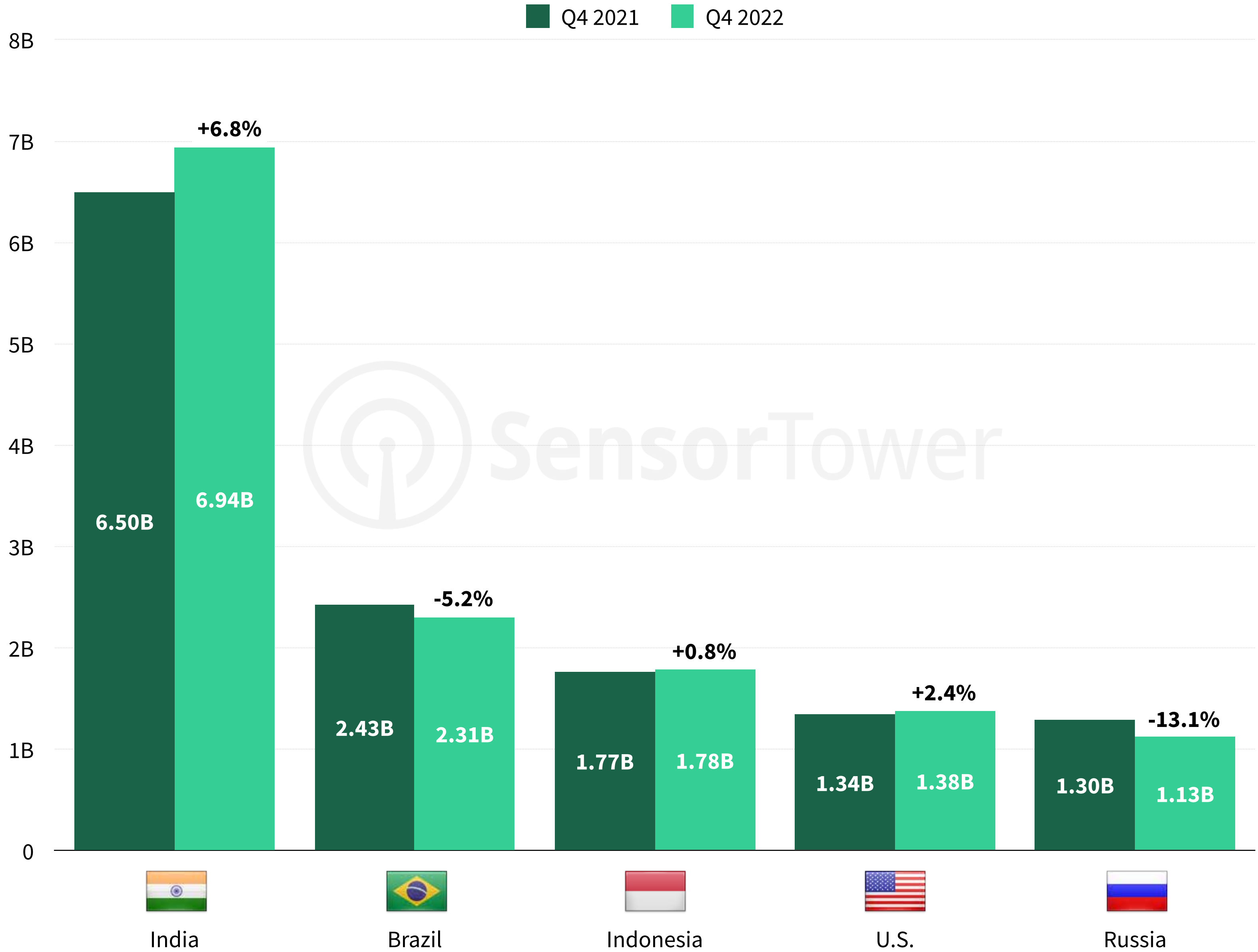
The U.S. was the top market on the App Store, for the fourth quarter in a row. The country saw 1.85B installs, up 0.3 percent year-over-year. China saw a 1.6 percent decline in installs Y/Y, putting it about 15M installs behind the U.S.

The U.S. was the only market out of the top markets on the App Store, that did not see negative growth. Despite its drop, Japan came in second place with a 1.1 percent decline, while Russia saw the largest decline out of the top market, with a 5.5 percent decline in downloads.

Note Regarding Download Estimates

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Google Play



Top Markets by Downloads

India saw 6.8 percent growth year-over-year and remained the top market on Google Play, with more installs than the other top five markets combined. India alone accounted for over 25 percent of installs on Google Play; the only country to account for a double digit share of installs in that store in Q4 2022.

Despite its modest 2.4 percent, the U.S. was the runner-up in download growth. It managed to grow its share of installs on Google Play to five percent, only 1.5 percentage points behind Indonesia.

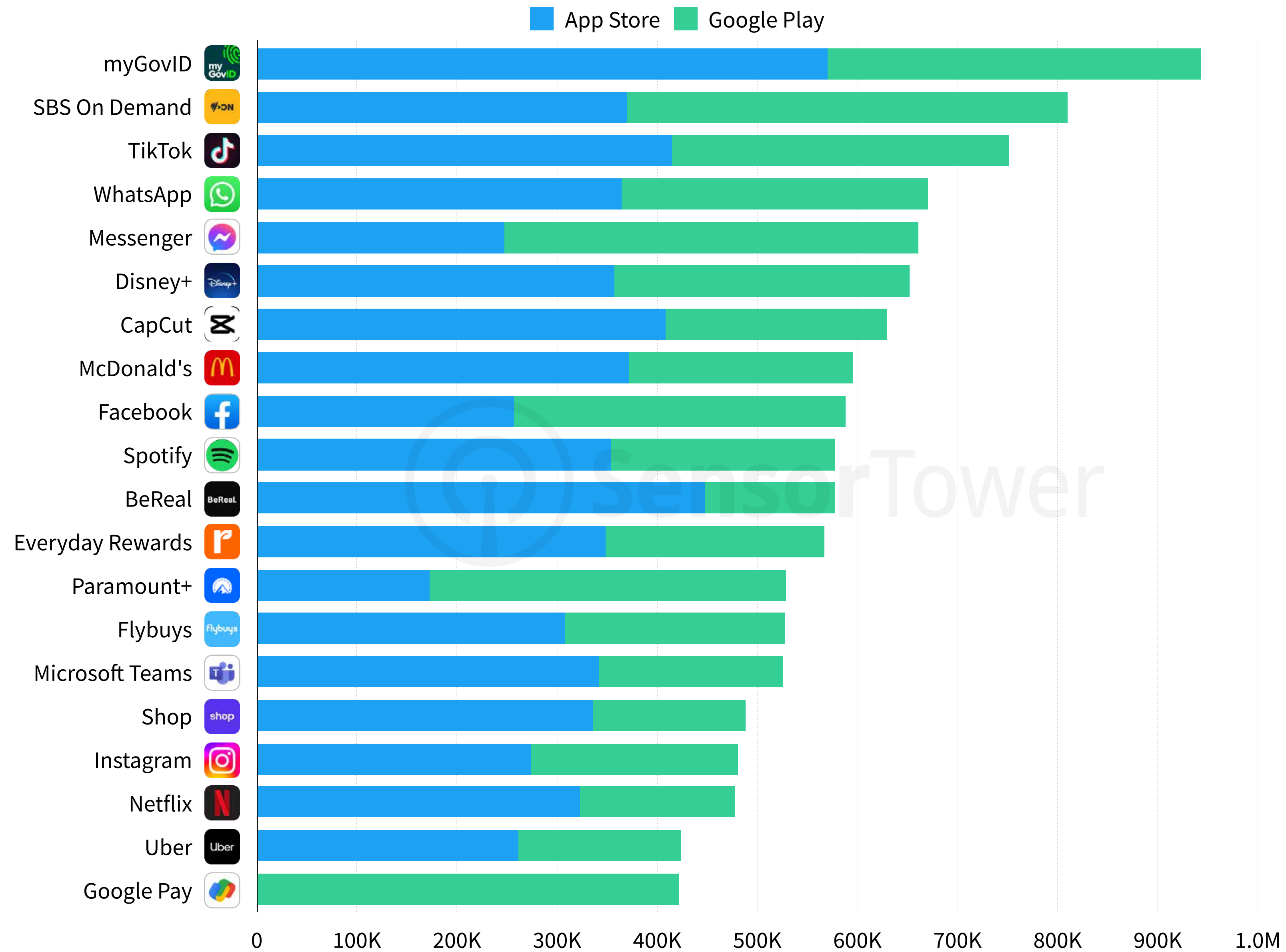
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Spotlight on Australia

—
The Latest Mobile Trends in Australia

Apps - Australia



Top Apps by Australia Downloads

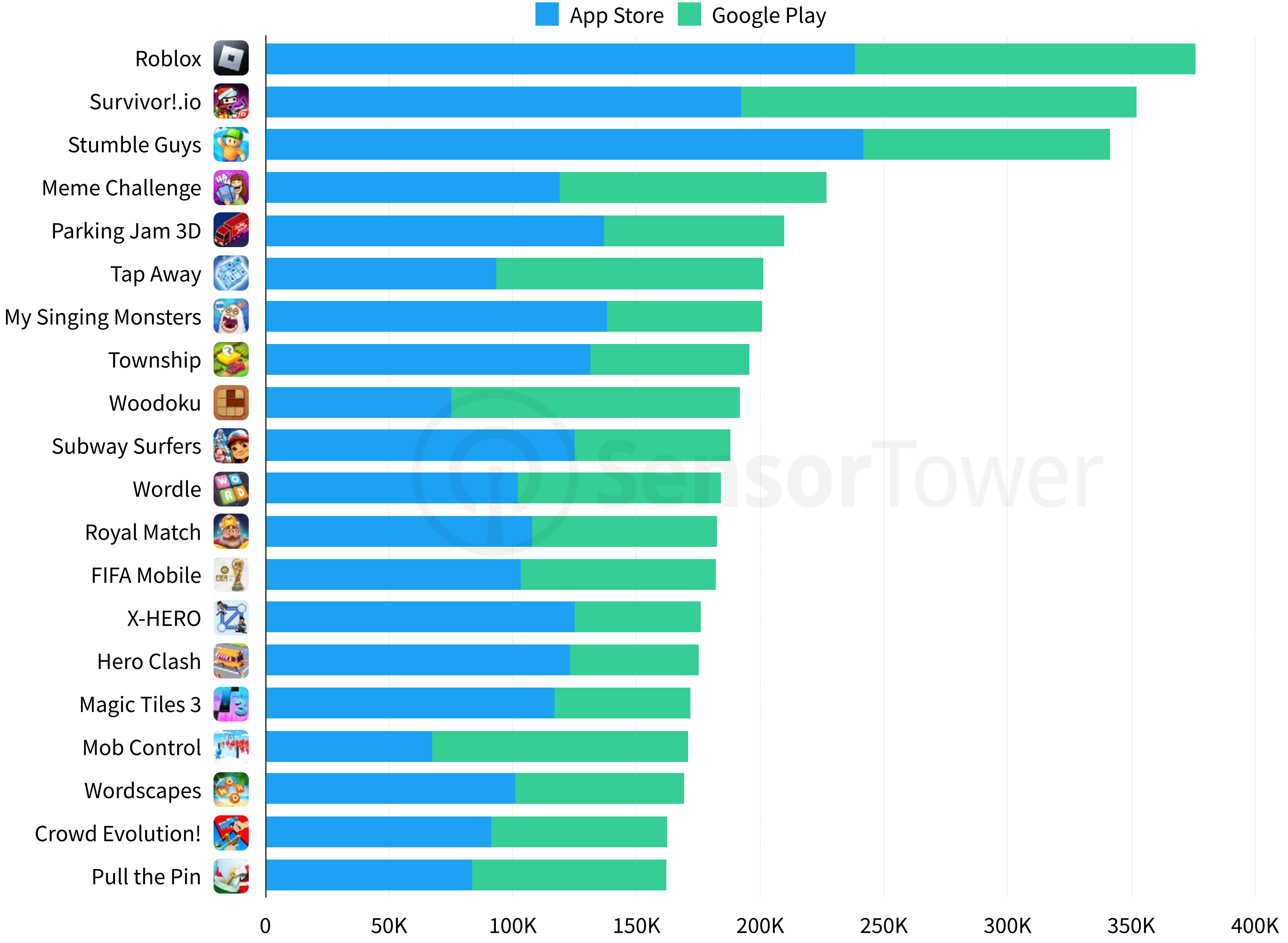
At over 940K installs myGovID, the Australian Government’s digital identity app, was the No. 1 app in Australia. Meanwhile, the popular streaming app, SBS on Demand, saw a whopping 439 percent growth year-over-year, propelling it to the No. 2 spot.

Only three of the top ten apps in Australia belonged to Meta, down from five in Q2 2022. Meanwhile, two of the top ten apps belong to ByteDance, indicating a shift away from Meta’s dominance among the top ten apps.

Note Regarding Download Estimates

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Games - Australia



Top Games by Worldwide Downloads

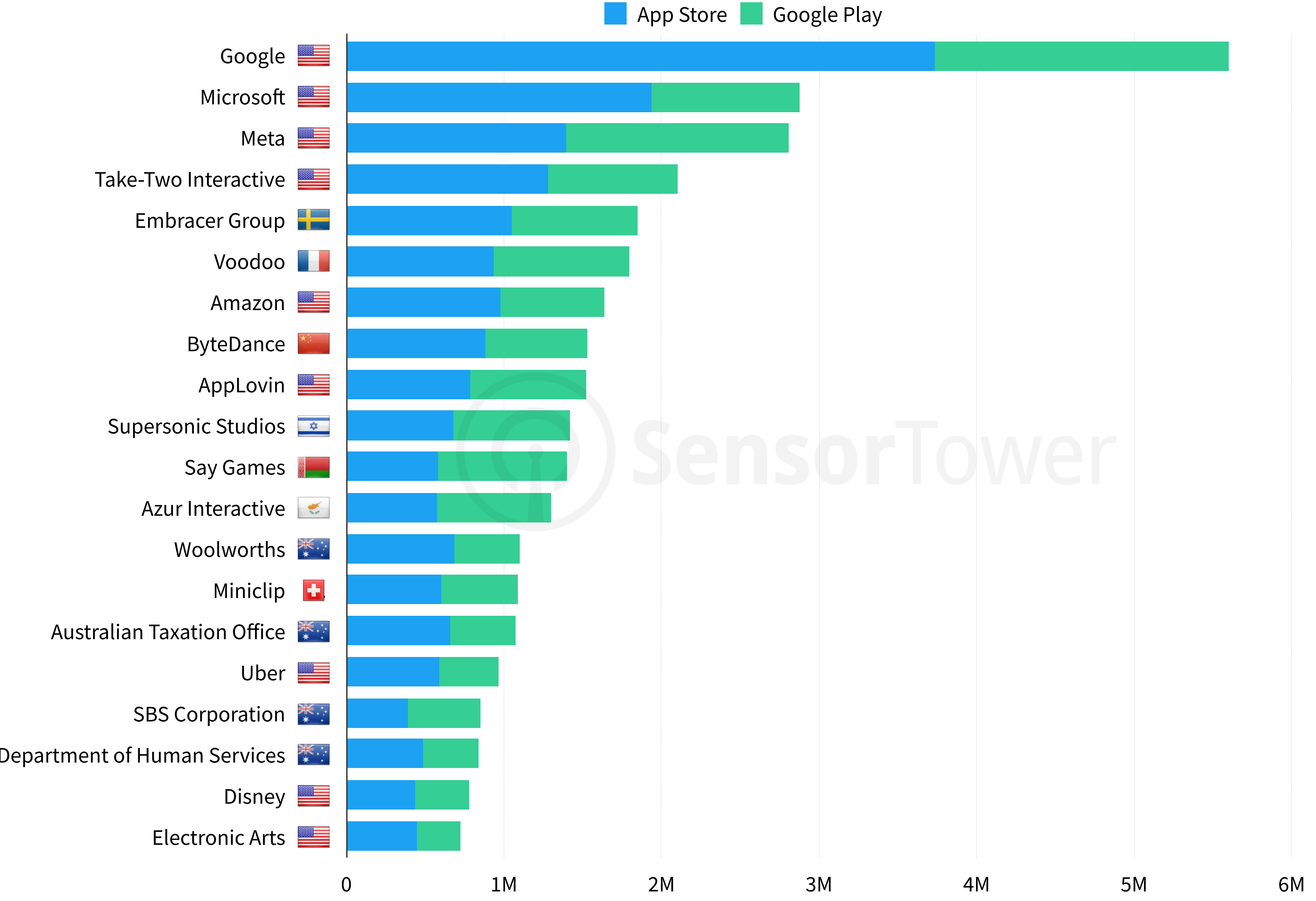
Roblox led in mobile game installs in Australia in Q4 2022 with almost 375K installs, up two percent year-over-year . Survivor!.io saw nearly 352K installs and managed to move up from No.4 in Q3 2022 to the No.2 in Q4 2022.

Stumble Guys managed to place in the top three for the second quarter in a row. While its rank fell from first to third place between Q3 and Q4 2022, it remained in close competition with the No. 2 game and still had a sizeable 100K install lead over the No. 4 game.

Note Regarding Download Estimates

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Publishers - Australia



Top Publishers by Australian Downloads

Google saw 5.6M installs, down three percent year-over-year, but still remained the dominant publisher in Australia in Q4 2022.

With nearly twice as many installs as the No. 2 publisher, Microsoft, Google does not seem likely to lose its grip on the lead anytime soon.

Neither of the top two publishers, Google and Microsoft, were responsible for any apps that ranked in the top ten apps in Australia in Q4 2022.

Despite this, both publishers remain in the lead, showing that top apps aren't necessary to score a "win".

Note Regarding Download Estimates

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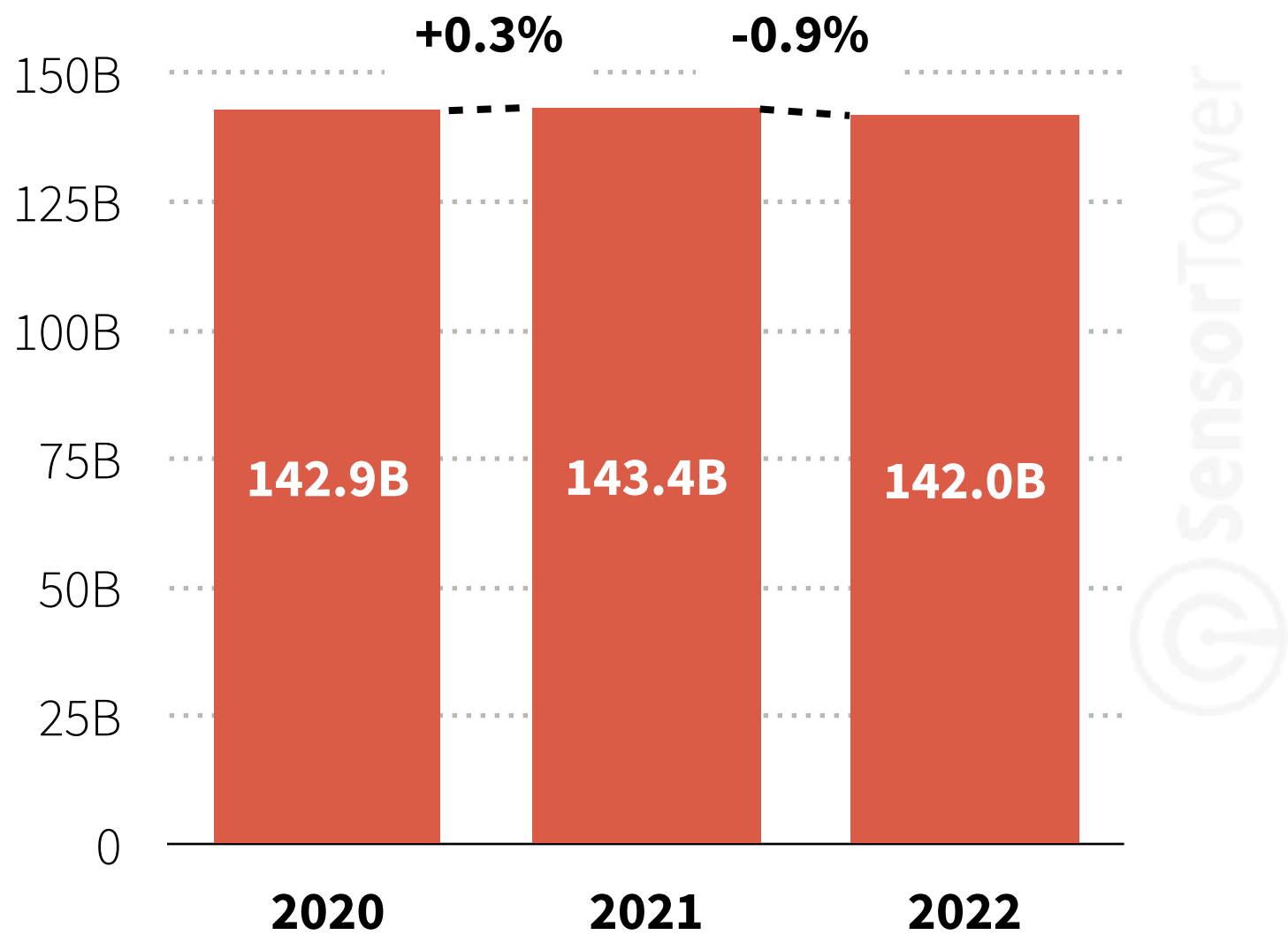


2022 Year in Review

—
Top Apps, Games, Publishers, and More

Market Overview: 2022 Worldwide Download Growth

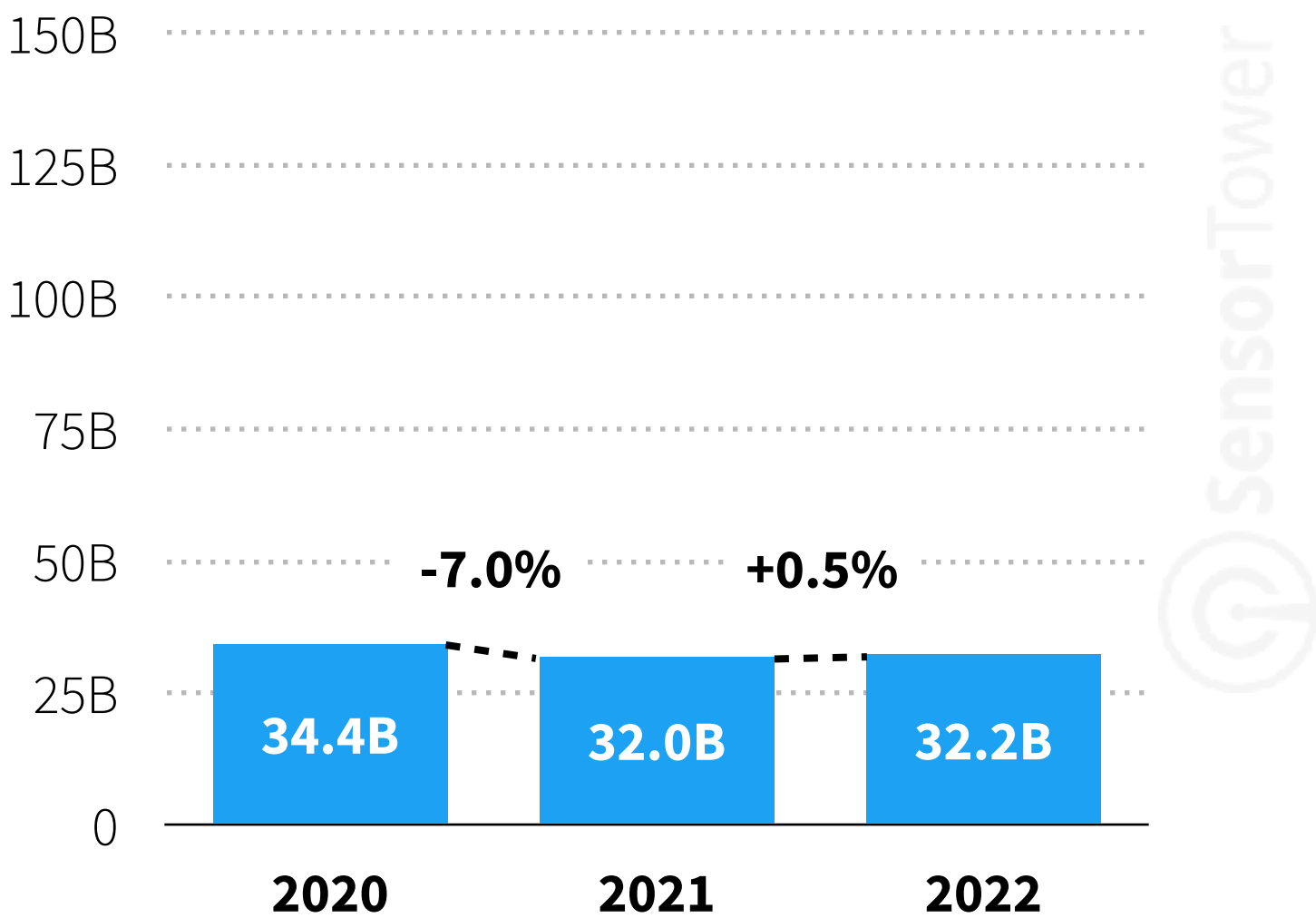
Worldwide App Store and Google Play Downloads



142.0 Billion

App Store + Google Play Downloads

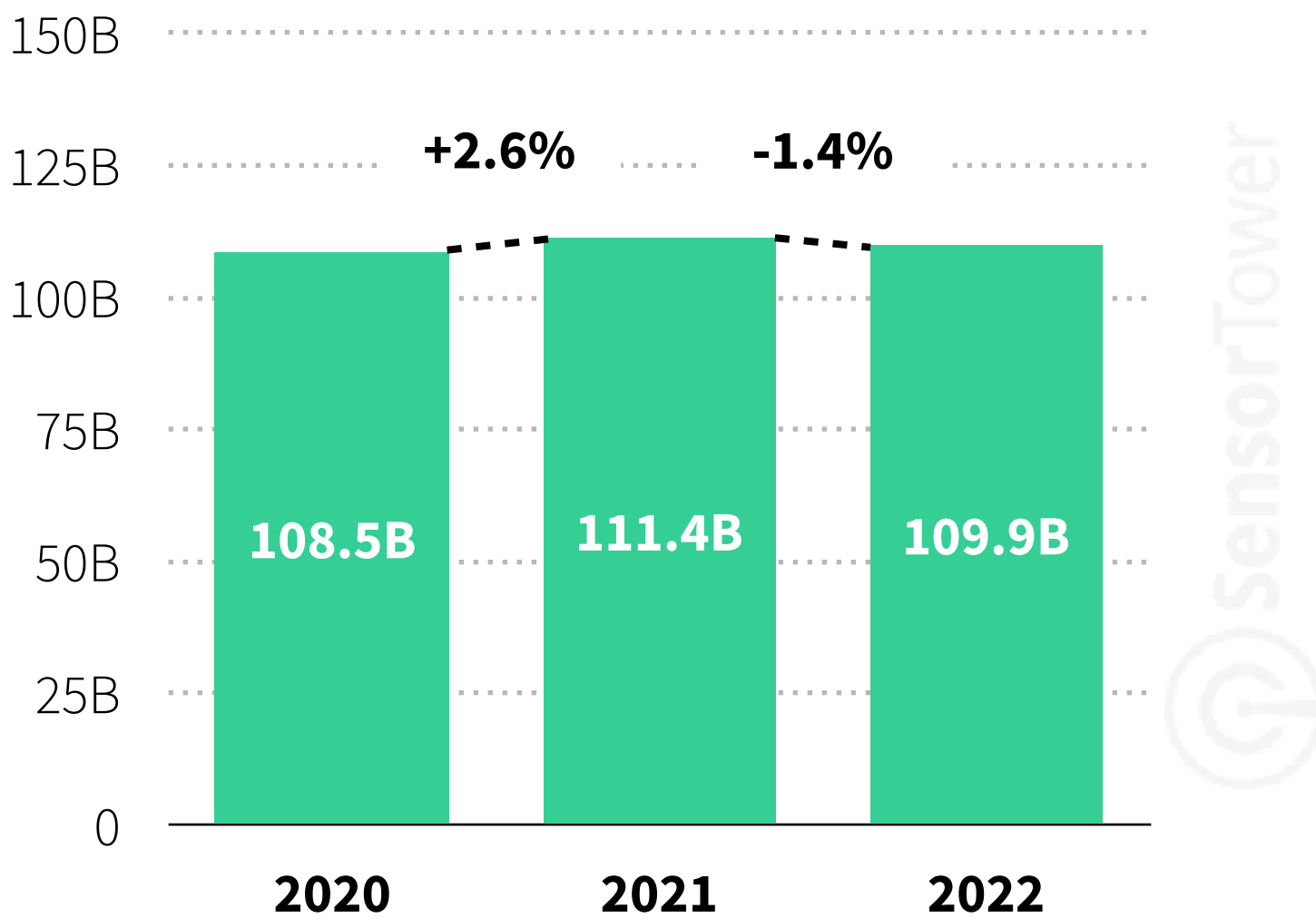
Worldwide App Store Downloads



32.2 Billion

App Store Downloads

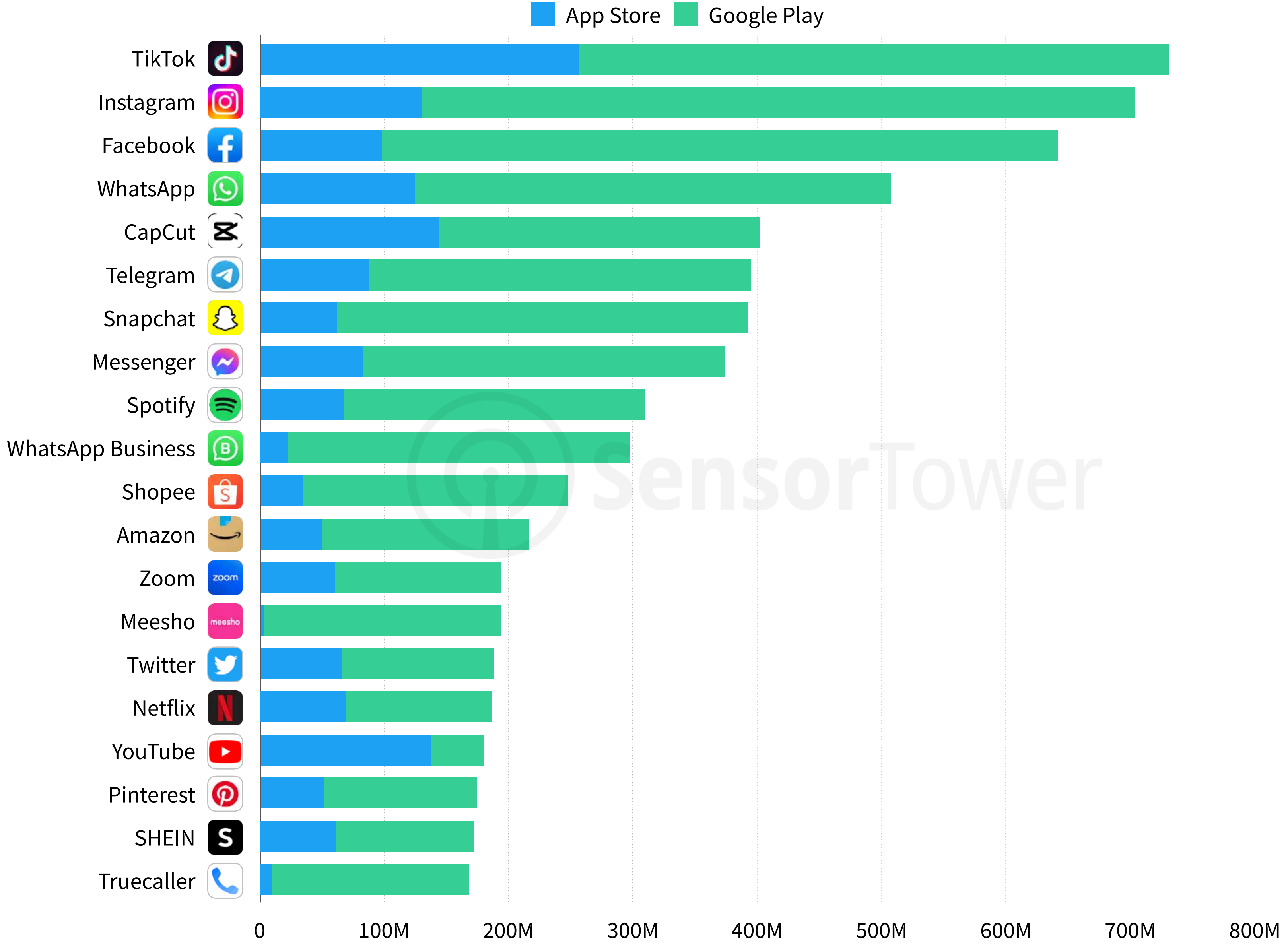
Worldwide Google Play Downloads



109.9 Billion

Google Play Downloads

Top Apps - Worldwide



Top Apps by Worldwide Downloads

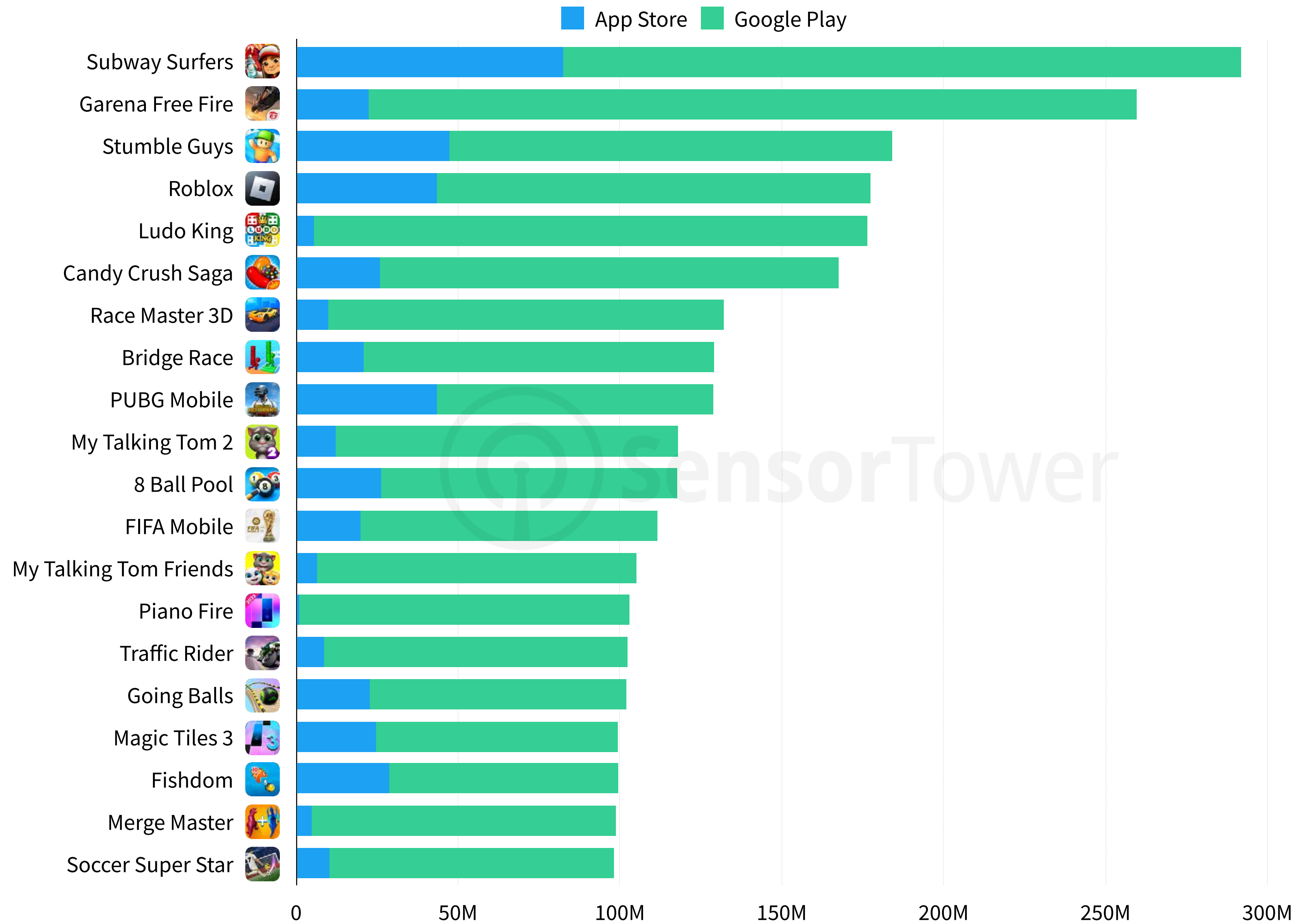
TikTok was the No. 1 App by yearly worldwide downloads for the third year in a row. TikTok saw 732M installs in 2022, a one percent decline year-over-year, but still over one percent more installs than its download figures in 2019.

Two publishers were responsible for the top five apps of 2022; ByteDance and Meta. While the No. 1 app belongs to ByteDance, Meta is responsible for three of the top five apps: Instagram, Facebook and WhatsApp.

Note Regarding Download Estimates

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Top Games - Worldwide



Top Games by Worldwide Downloads

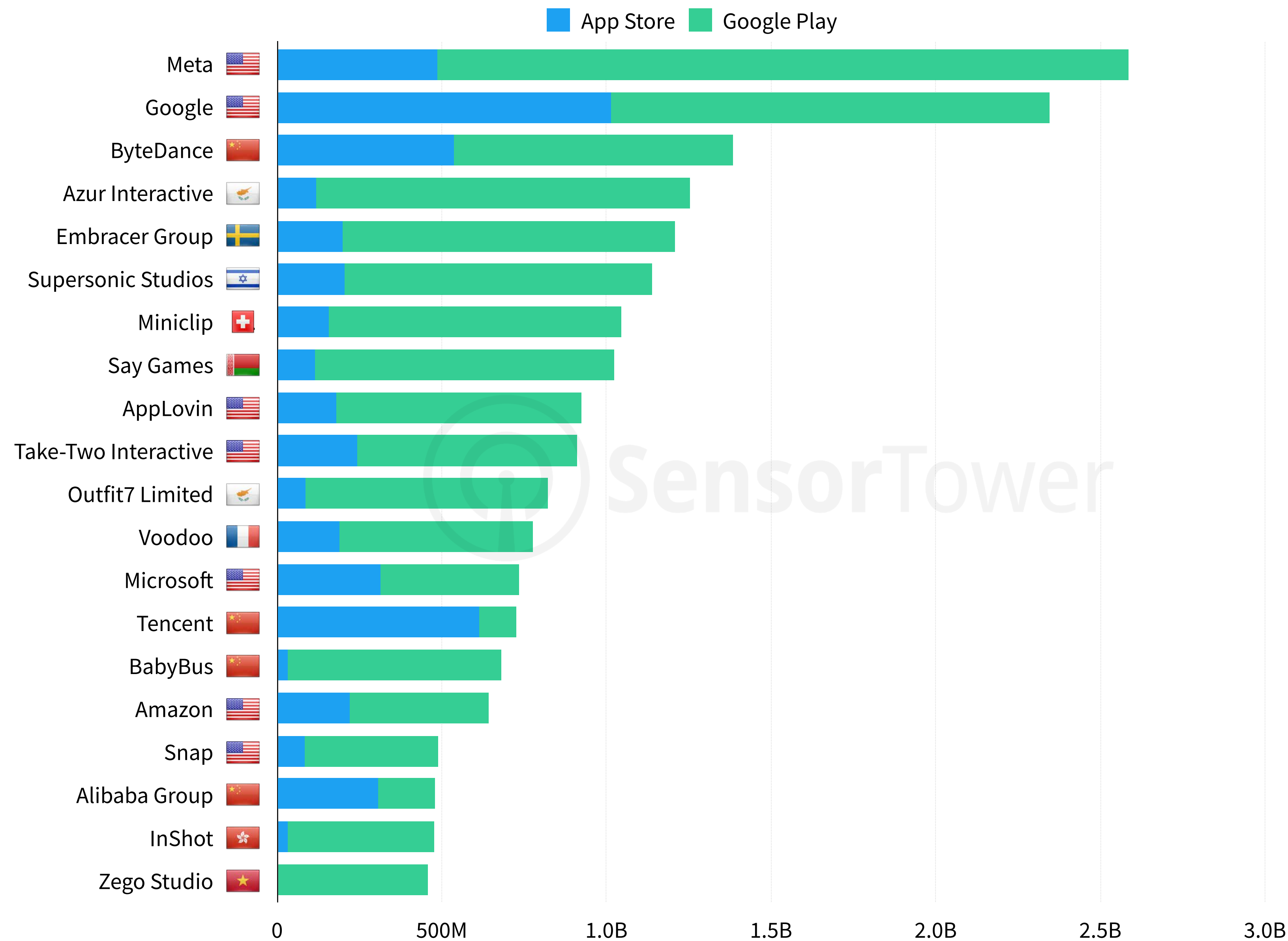
Subway Surfers was the No. 1 game in 2022 by worldwide downloads with nearly 292M installs, up 48 percent from the previous year. Meanwhile, Garena Free Fire came in second place for the third time since 2019.

Newcomer Stumble Guys managed to reach the No. 3 rank with over 184M installs. This is especially notable considering Stumble Guys' early 2021 worldwide release date and the fact that every other game in the top 5 released in 2017 or prior.

Note Regarding Download Estimates

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Publishers - Worldwide



Top Publishers by Worldwide Downloads

At nearly 2.6B installs, Meta once again takes the lead in worldwide downloads, after a two year stretch in which Google was ranked the No. 1 publisher. Meta installs were up seven percent, while Google installs fell by 15 percent year-over-year. The growth seen by Meta was largely due to the 203M install growth seen by the Google Play versions of WhatsApp and Instagram while the decline seen by Google was due to the 396M install decrease of the Google App on Google Play.

Game publisher Azur Interactive rose from No. 14 in 2021 to become the No. 4 publisher worldwide in 2022. It saw over 1.2B installs worldwide, with its top two games Worms Zone.io and Stack Ball being responsible for just over nine percent of the publishers installs in 2022.

Note Regarding Download Estimates

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Story of the Year

—
Key Trends in Mobile

Story of the Year:

Stumble Guys Saw Success Around the Globe in 2022

Stumble Guys was released in early 2021 but has successfully managed to become both the fastest growing game and the fastest growing app by worldwide downloads in 2022.

- **Stumble Guys ranked in the top five games by downloads in most regions around the world.** The only regions where it did not place in the top five games were Africa and Asia.
- **When it comes to individual countries, Stumble Guys saw most of its downloads come from five of the worlds top ten markets.** Indonesia was the most popular market.
- **Germany had the highest Revenue Per Download (RPD) out of Stumble Guys' top five markets by revenue.** Despite a lower RPD, the U.S. was Stumble Guys' top market by revenue, responsible for nearly 25 percent of the worldwide revenue.



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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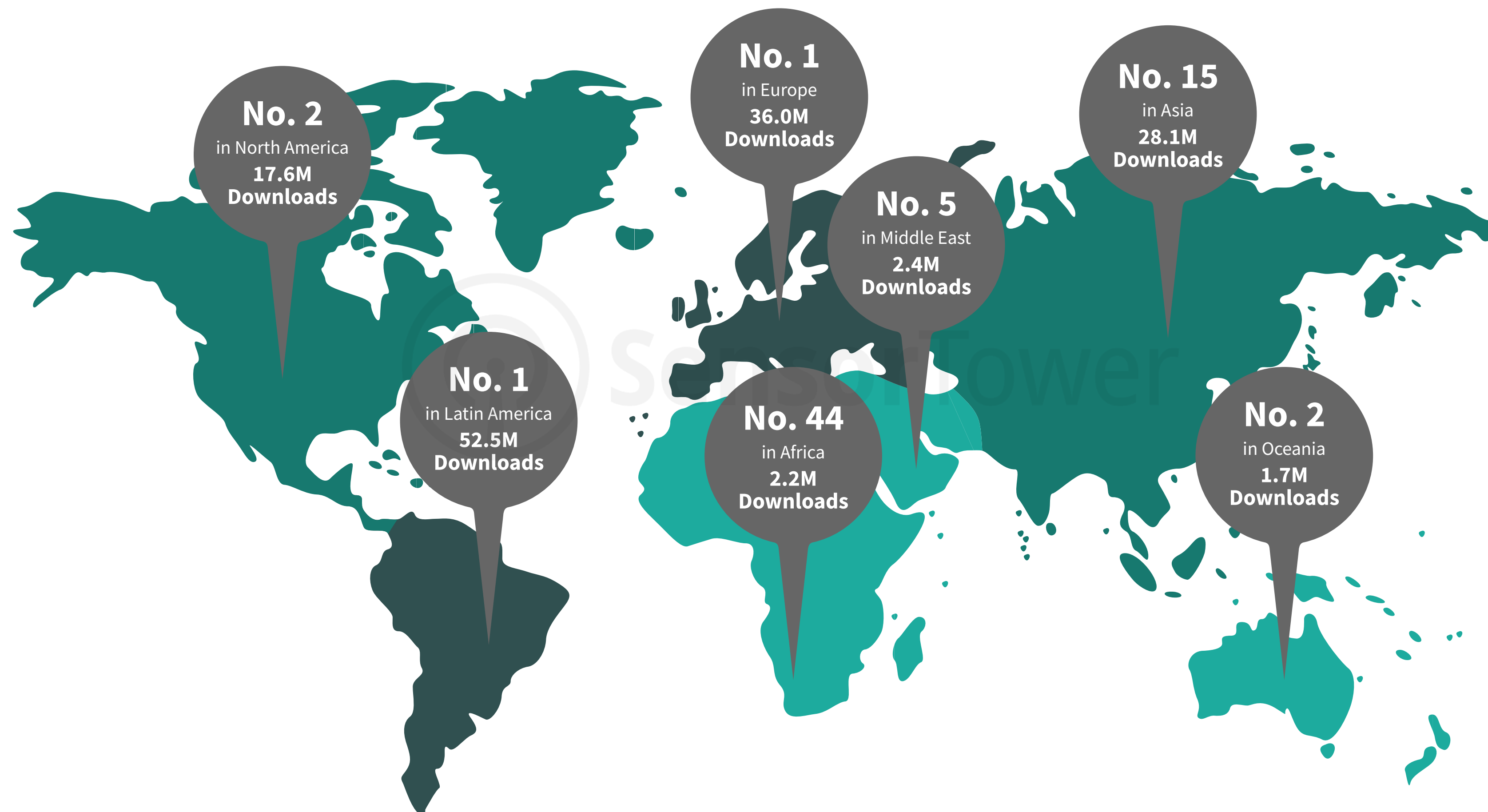
Stumble Guys Dominated by Download Growth in 2022

Stumble Guys' rank among games by 2022 Download Growth in each region, App Store and Google Play



Stumble Guys

Kitka Games



Downloads by Region

Stumble Guys was not only the fastest growing game, but also the fastest growing app of 2022 by downloads. It grew by 140.4M installs around the world in 2022. The second fastest growing app was Shopsy which saw 133.1M installs, while the second fastest growing game was Merge Master, which saw 98.9M installs in 2022.

Stumble Guys saw its downloads surge across the globe, placing it in the top five games by download growth in most regions. However, it failed to reach the top five in Asia, where Puzzle and Racing games performed better. Despite its relatively recent release in February 2021, it has already reached nearly 236M all time downloads around the world.

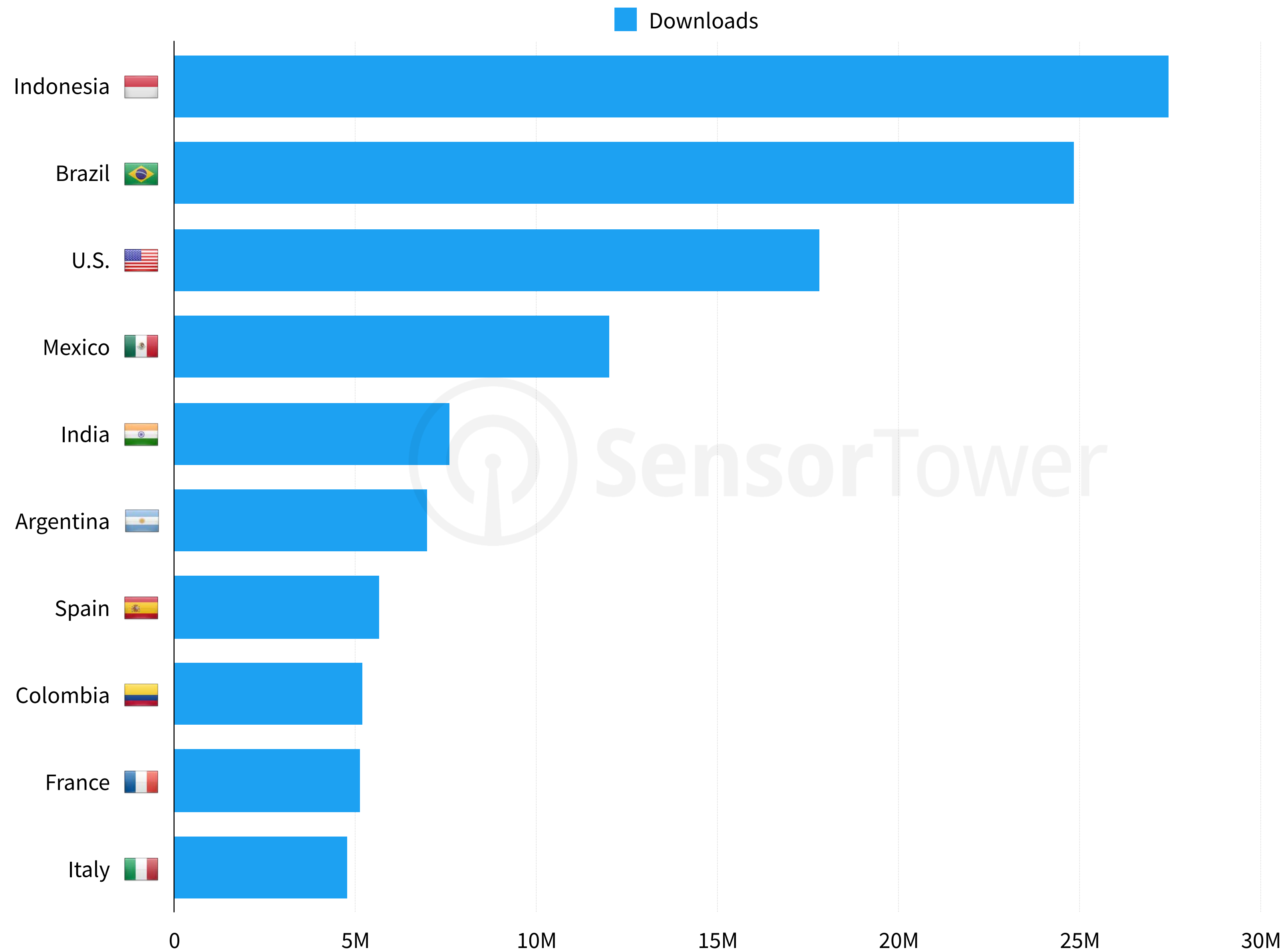
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As Google Play is not available in China, we have excluded it from this chart.

Stumble Guys Sees Success in Five of the Top Ten Markets

Top Markets for Stumble Guys by Downloads, 2022, App Store and Google Play



Top Markets by Downloads

The top ten markets for Stumble Guys were **Indonesia, Brazil, the U.S., Mexico, and India**; countries that were among the top ten markets by downloads in the World in 2022. While Stumble Guys has not been available in Russia since September 2022, more downloads may be obtained by targeting other top markets such as Turkey, Vietnam, and Pakistan. Pakistan and Turkey may be particularly of interest, given their position in the top ten markets for Subway Surfers, another top Casual Runner game.

At over 27.4M installs, Indonesia was the top Market for Stumble Guys in 2022. Brazil came in second place with just over 24.8M downloads followed by the U.S. which saw nearly 17.8M installs.

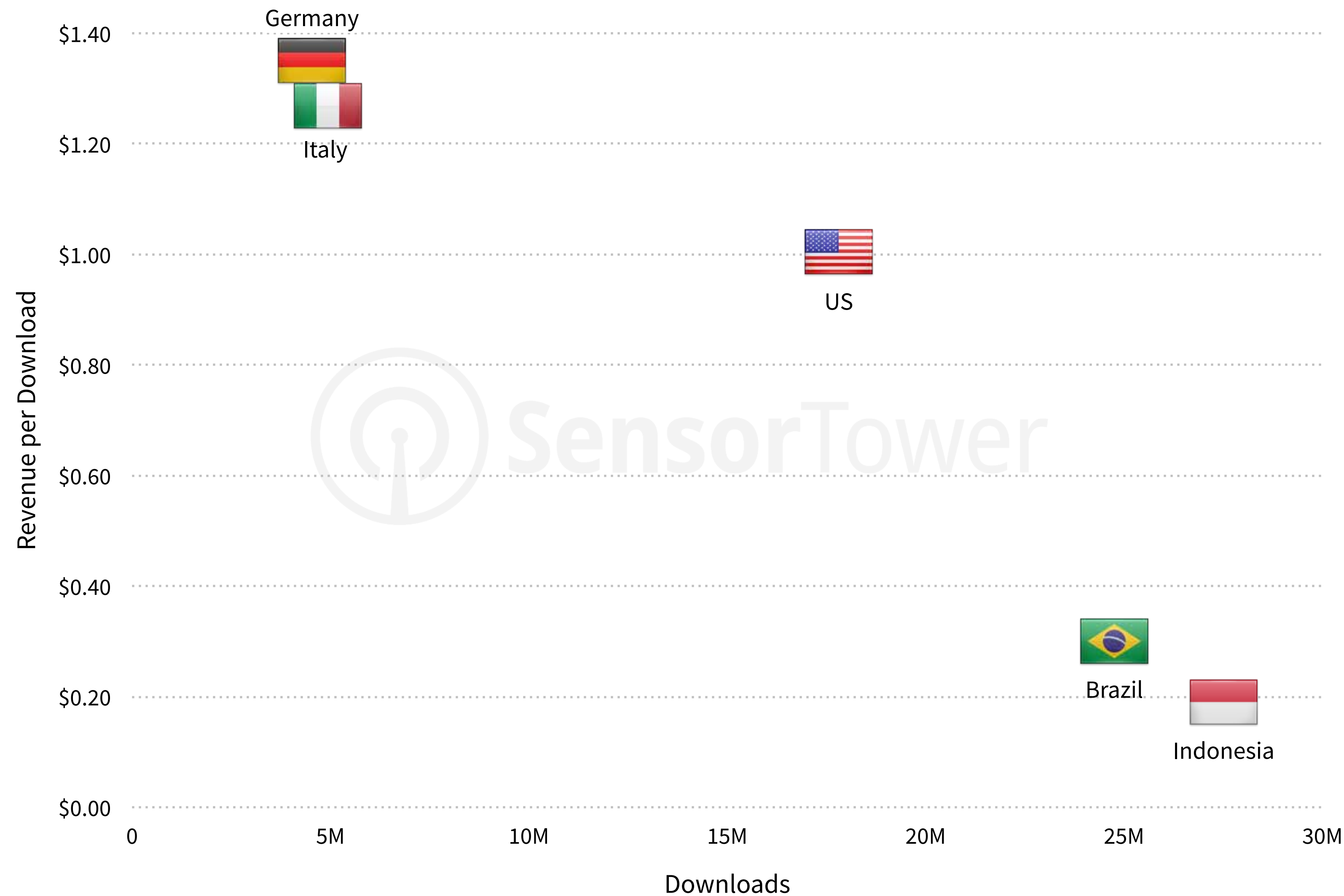
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As Google Play is not available in China, we have excluded it from this chart.

Stumble Guys Sees the Highest Revenue Per Download in Germany

Revenue Per Download (RPD) of Stumble Guys' Top Five Markets by Revenue, App Store and Google Play, 2022



Top Markets by Revenue Per Download

The U.S. was Stumble Guys' top market by Revenue. The country generated \$18.1M of the game's revenue in 2022, accounting for nearly 25 percent of worldwide revenue. Brazil placed No. 2 at \$7.4M followed by Italy which yielded \$6.2M.

Germany saw the highest Revenue Per Download (RPD) at \$1.34, followed closely by Italy which saw an RPD of \$1.30. Indonesia and Brazil, which saw the most downloads at 27.4M and 24.8M installs, were No. 5 and No. 2 by revenue due to their low RPDs of \$0.20 and \$0.30, respectively. This is a trend likely to be seen by other games, where wealthier nations typically see much higher RPDs.

Note Regarding Download Estimates

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Sensor Tower

Solutions



Store Intelligence

Make strategic decisions with the industry's most accurate estimates.



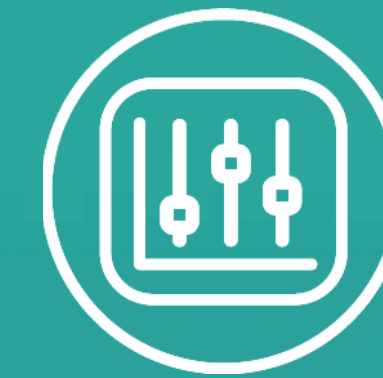
App Intelligence

Drive organic growth with the leading App Store Optimization platform.



Ad Intelligence

Develop winning User acquisition campaigns with crucial mobile advertising insights.



Usage Intelligence

Benchmark app usage, engagement, and demographics.



App Teardown

Evaluate which SDKs apps are using and measure SDK adoption across market segments.



Consumer Intelligence

Access unfiltered mobile user engagement for financial analysis.

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About **Sensor Tower**

Sensor Tower is the leading solution for mobile marketers, app developers, and industry analysts who demand competitive insights on the mobile economy. Sensor Tower's product suite includes: Top Charts, App Intelligence, Store Intelligence, Ad Intelligence, and Usage Intelligence.



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