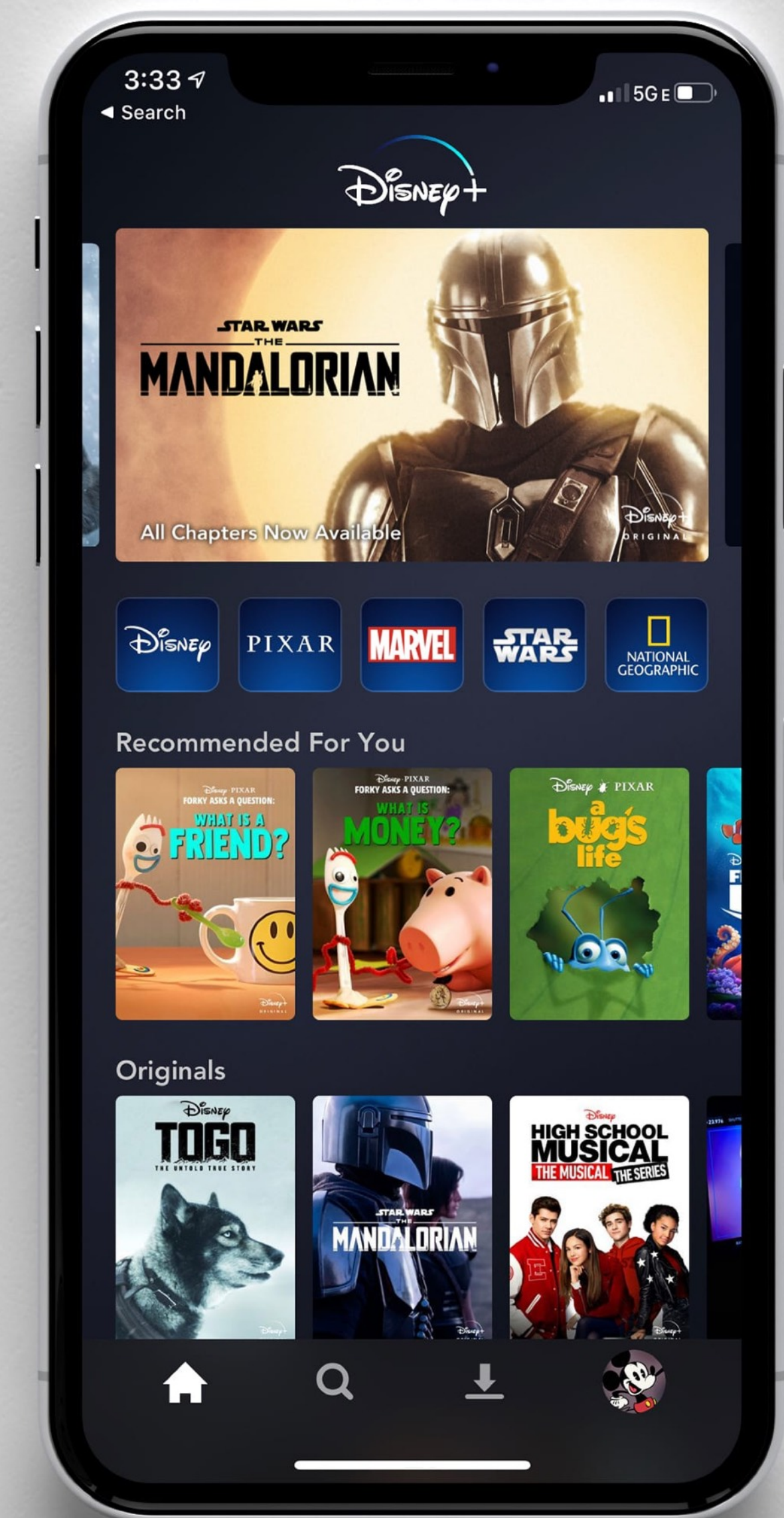


Q4 2019

Store Intelligence Data Digest



Executive Summary: Highlights



Worldwide app downloads totaled **28.7 billion** in **4Q19**, a **4.7% year-over-year increase**. 2019 full year downloads grew 9.1% to 114.9B, including 30.6B on the App Store and 84.3 from Google Play.



The biggest story of Q4 2019 was the launch of **Disney+**, which quickly became the **top downloaded app in the U.S.** It had more than 30 million U.S. downloads in the quarter.



For the first time in more than five years, Google passed Facebook to become the **top mobile publisher by worldwide downloads**. It had 841M first-time downloads in 4Q19, up 27.6% Y/Y.



TikTok ended the year as the **No. 2 app by global downloads behind WhatsApp**. India was responsible for nearly 45% of TikTok's first-time downloads in 2019.

Table of Contents:

Topics Covered

The Q4 2019 Store Intelligence Data Digest offers analysis on the latest mobile trends:

Top Charts for the Quarter

5. Market Overview:

Worldwide year-over-year download growth for the App Store and Google Play

6. Top Apps:

Top non-game apps globally, in the U.S., and in Europe

16. Top Games:

Top mobile games by downloads across the App Store and Google Play

26. Top Publishers:

Top publishers of mobile apps and games worldwide, in the U.S., and in Europe

36. Top Categories:

A look at year-over-year growth for the top categories on both app stores

39. Top Countries:

The countries that had the most installs in the quarter and a look at Y/Y growth

2019 Year in Review

43. 2019 Year in Review:

Top apps, games, publishers, new apps, and new games globally in 2019

51. Disney+:

A look at where Disney+'s launch places it among top SVOD apps in the U.S.

56. TikTok:

Download and revenue trends for ByteDance's social video phenomenon

60. Console Games Storm Mobile:

Call of Duty: Mobile and Mario Kart Tour launches compared to other top games

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, 2018 through December 31, 2019.
- 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.

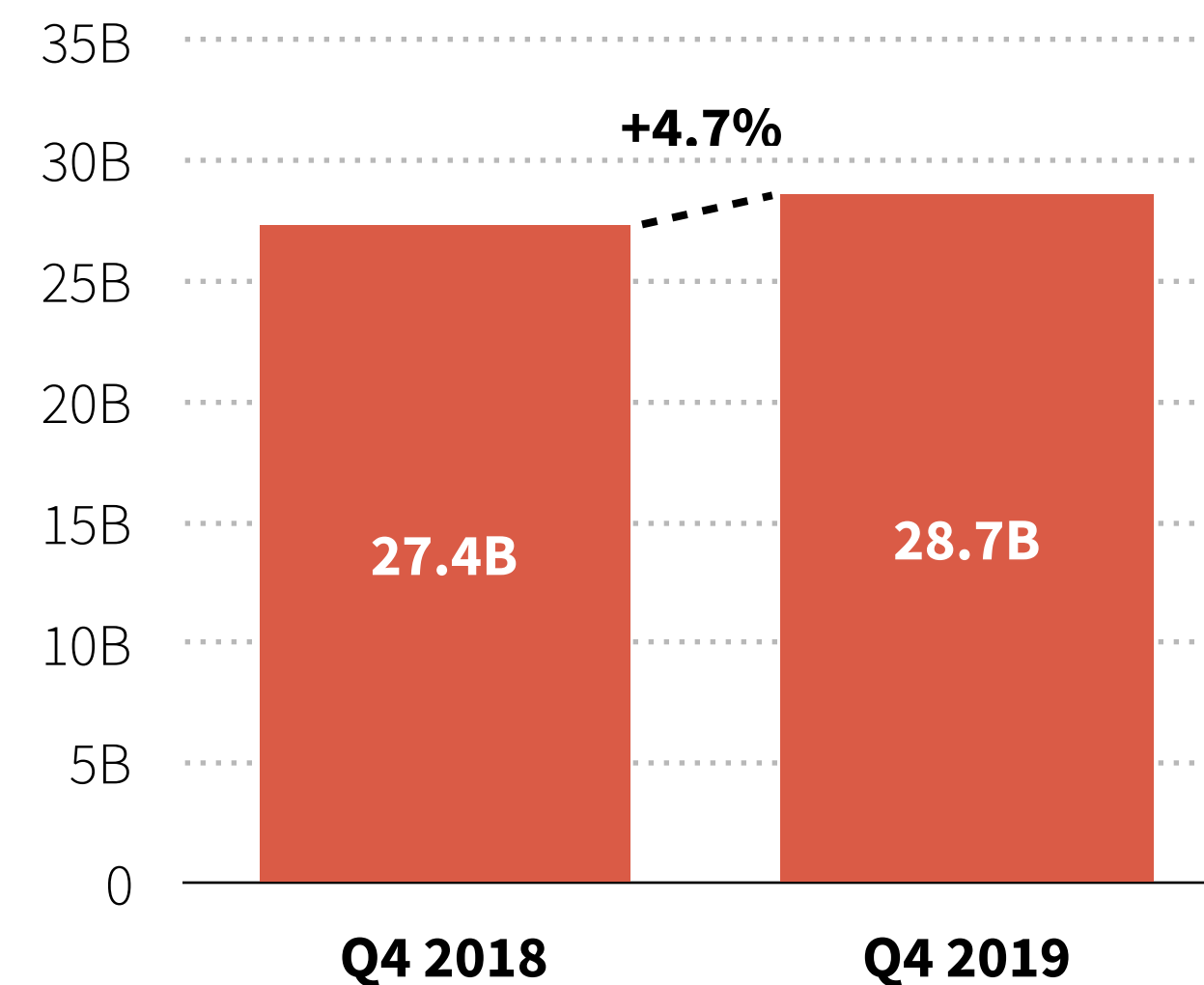
Could your business benefit from access to Store Intelligence insights and the highly accurate data used to build this report? See the fastest growing apps and publishers by downloads or revenue.

REQUEST DEMO

Market Overview:

Q4 2019 Worldwide Download Growth

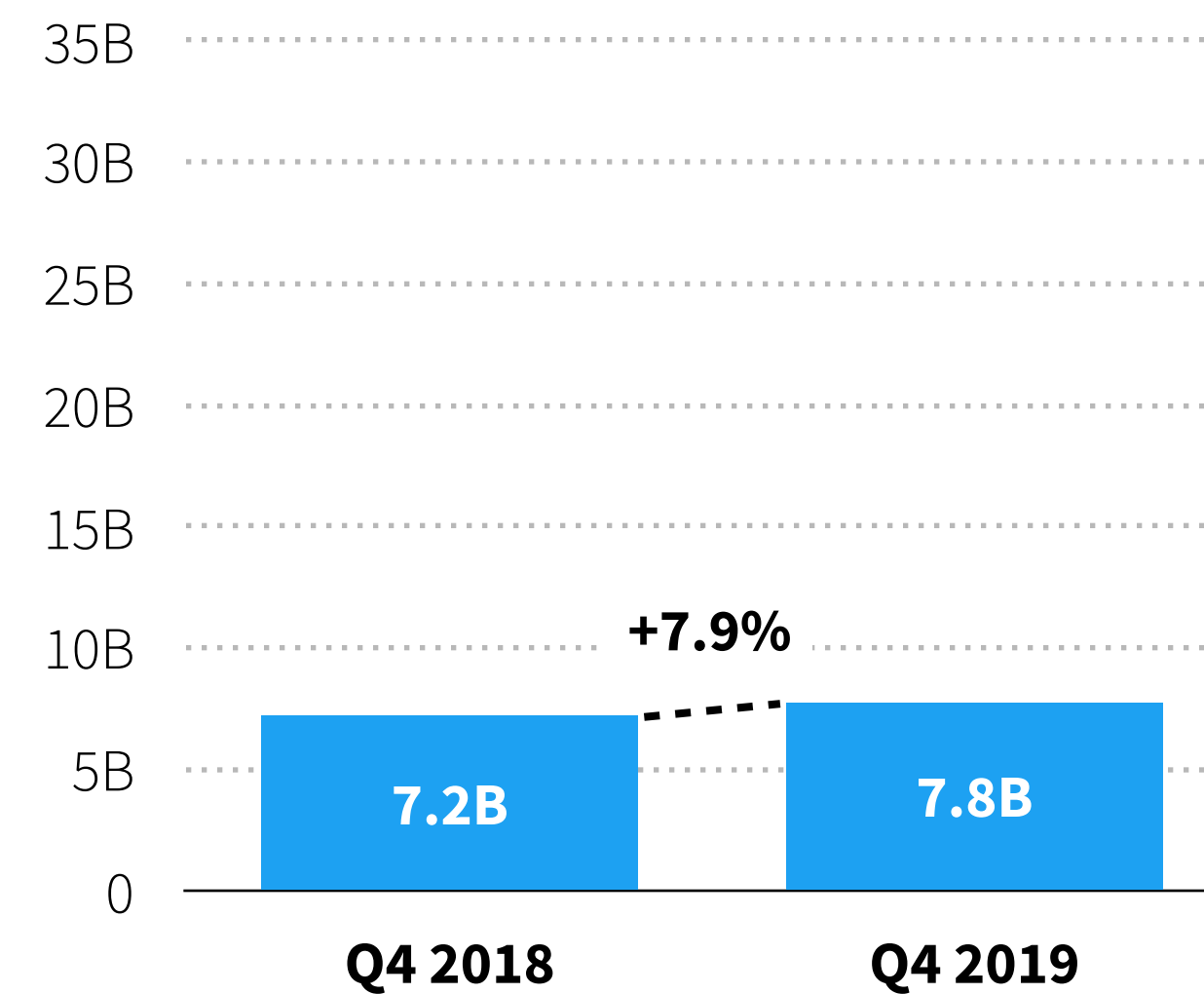
Worldwide App Store and Google Play Downloads



28.7 Billion

App Store + Google Play Downloads

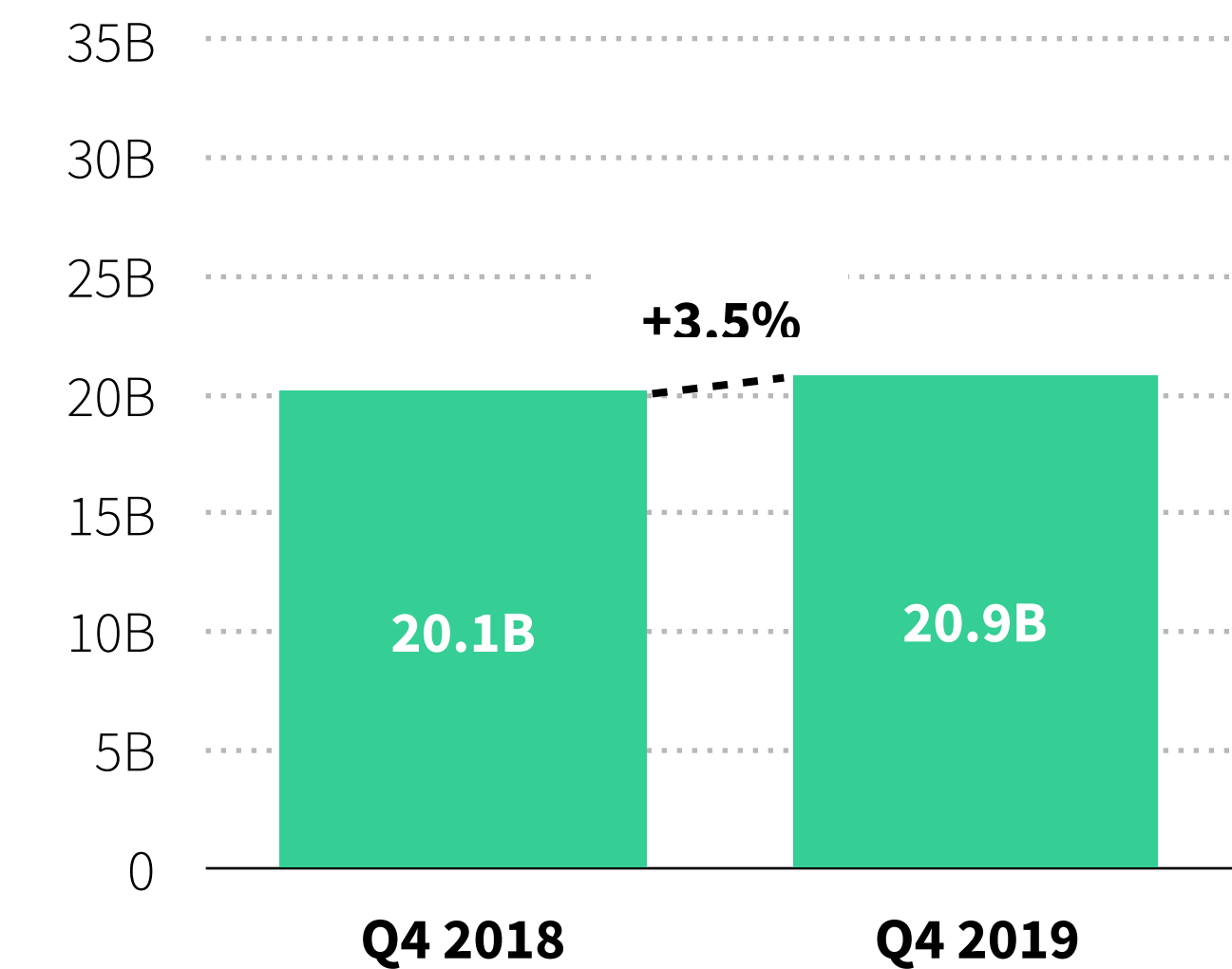
Worldwide App Store Downloads



7.8 Billion

App Store Downloads

Worldwide Google Play Downloads



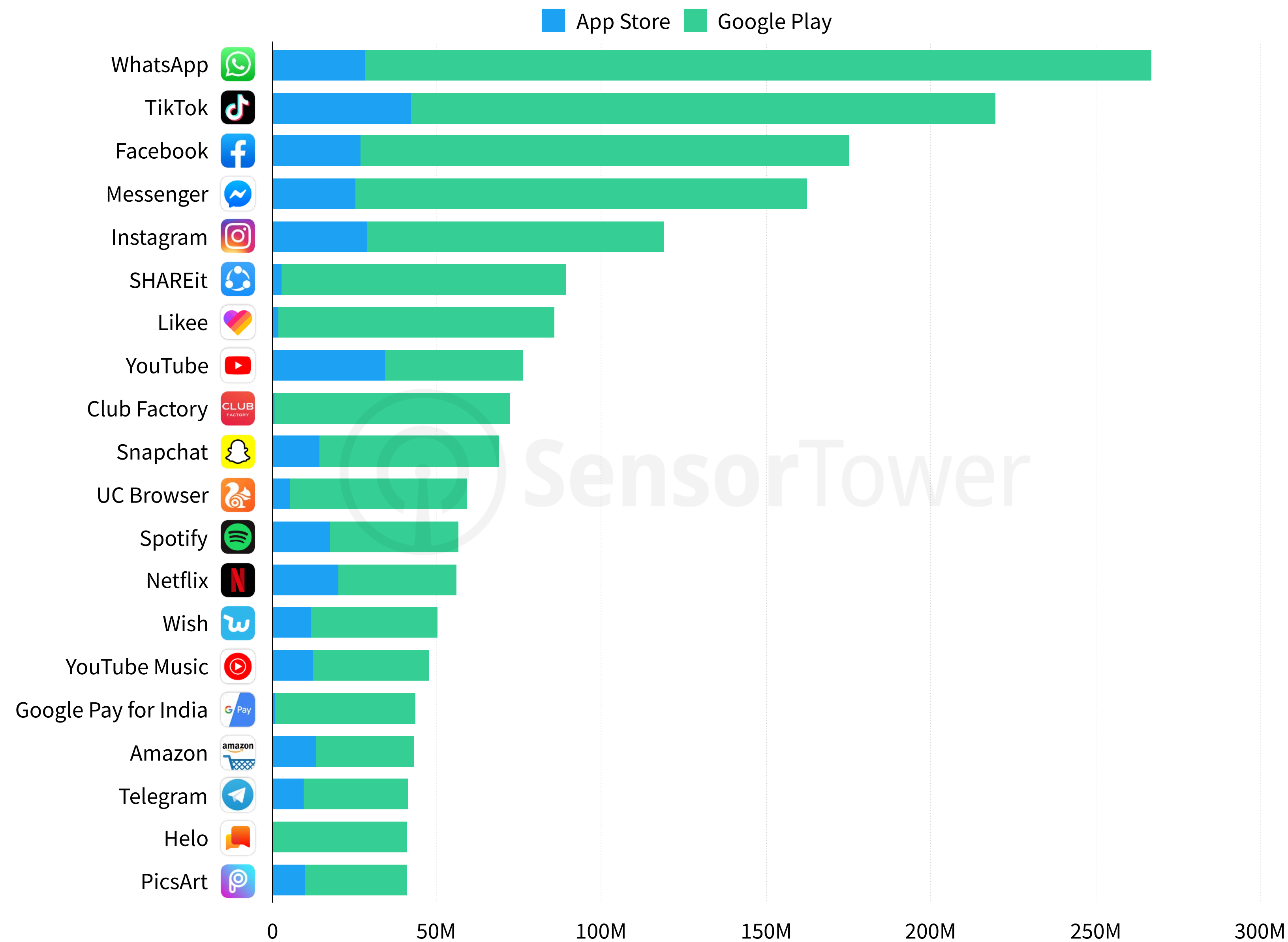
20.9 Billion

Google Play Downloads

A low-angle, upward-looking shot of a modern skyscraper with a glass facade, set against a clear blue sky. The building's lines converge towards the top of the frame, creating a strong sense of height and scale. The text 'Top Apps' is centered over the middle of the image in a white, sans-serif font.

Top Apps

Overall - Worldwide



TikTok downloads reached an all-time high in Q4 2019 with nearly 220 million installs.

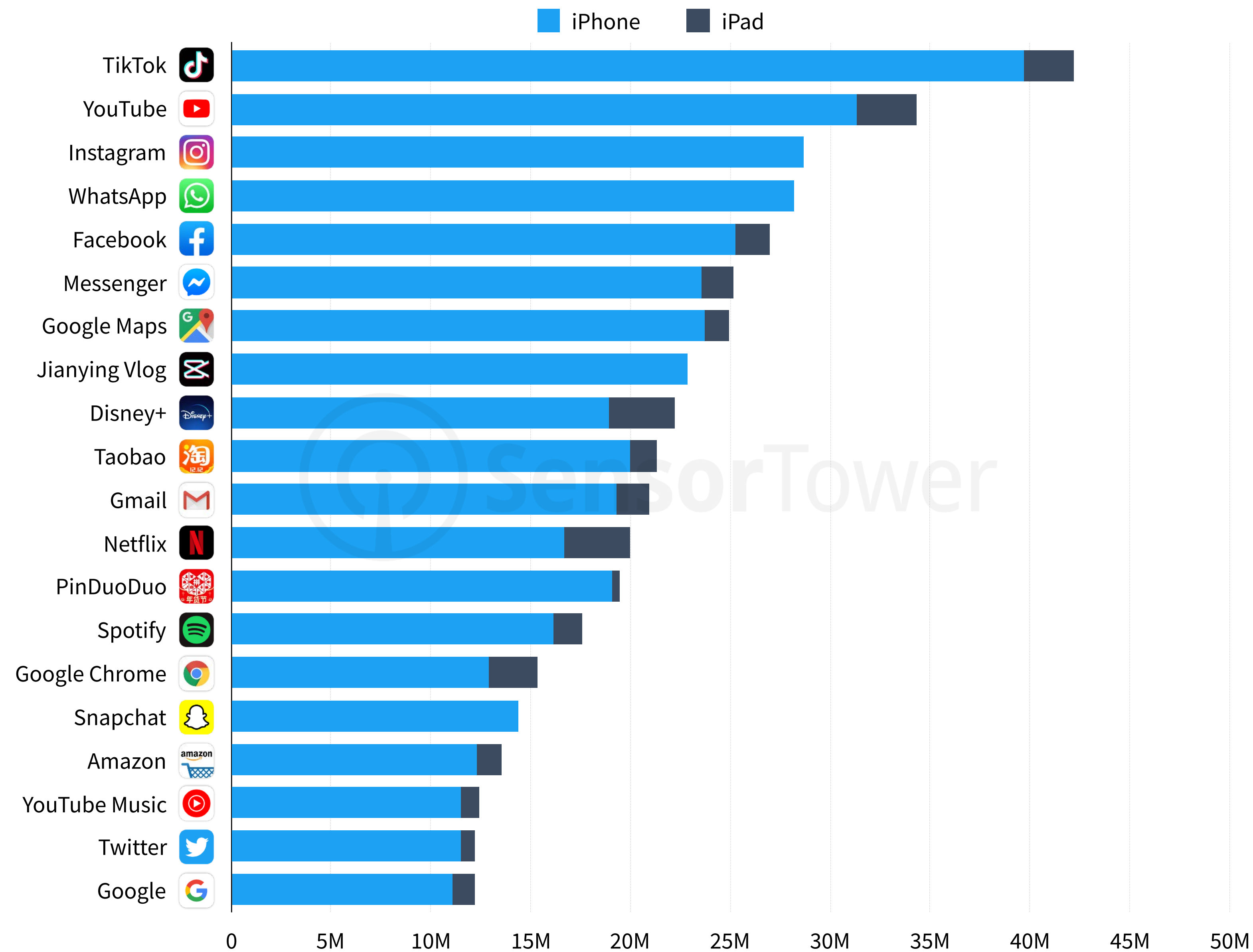
This represented a 24% increase over Q3 2019 and 6% growth Y/Y.

WhatsApp remained on top this quarter, leading four Facebook-owned apps in the top five. WhatsApp experienced a huge growth of 39% Q/Q in 4Q19, after decreased downloads in the previous four quarters.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Oct. 1 through Dec. 31, 2019. 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.

App Store - Worldwide



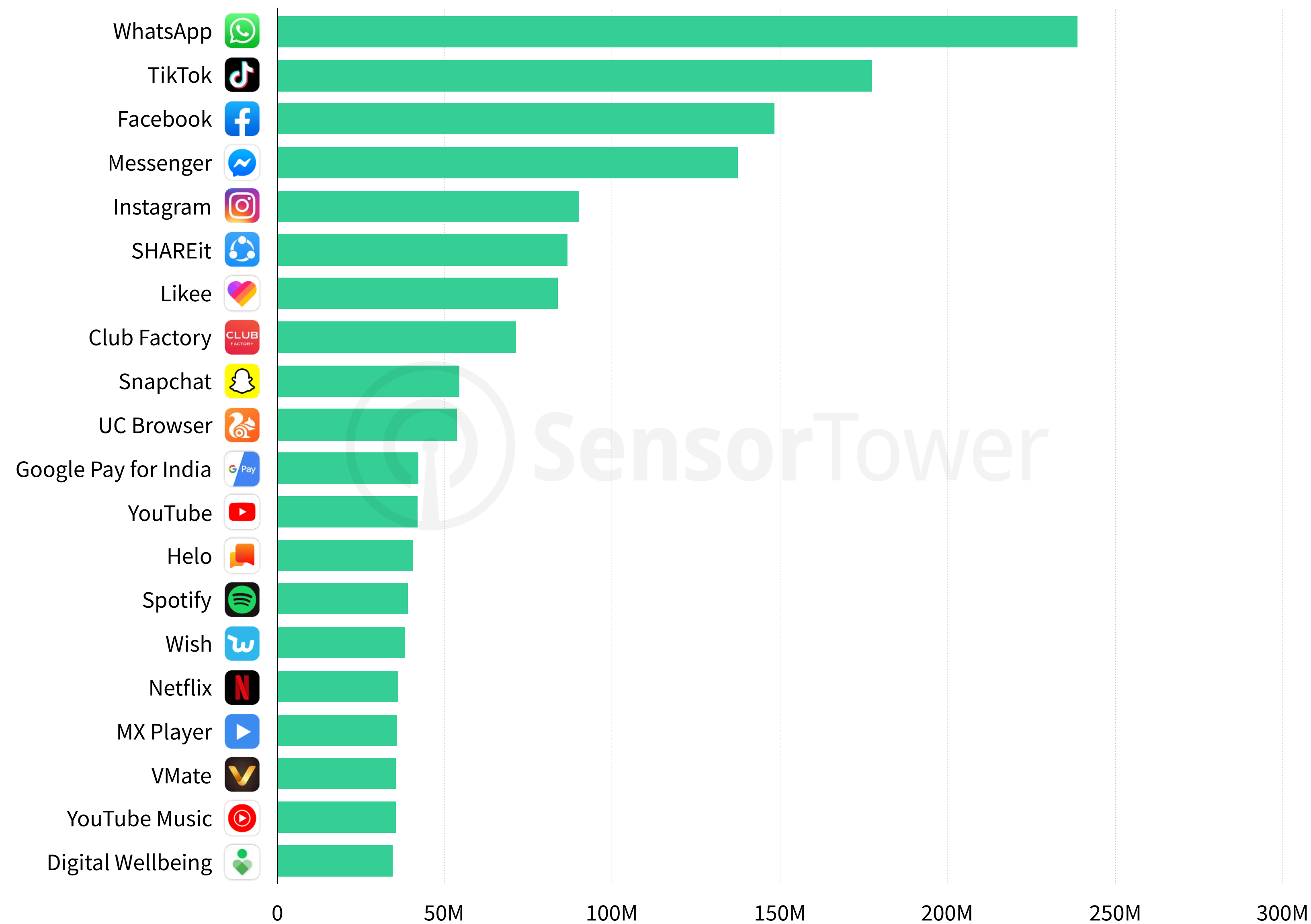
Disney+ was the No. 9 app by worldwide downloads in Q4 2019. It achieved this despite launching well into the quarter on November 12.

Google had six of the top 20 App Store apps in the quarter, including YouTube, Google Maps, Gmail, and Google Chrome. Google was the top publisher by App Store downloads in 4Q19.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Oct. 1 through Dec. 31, 2019. Apple apps are excluded. We report unique installs only (one download per user). Figures represent aggregate installs of all app versions, ex: Facebook and Facebook Lite.

Google Play - Worldwide



TikTok climbed to the No. 2 spot on Google Play in Q4 2019, its highest ranking yet.

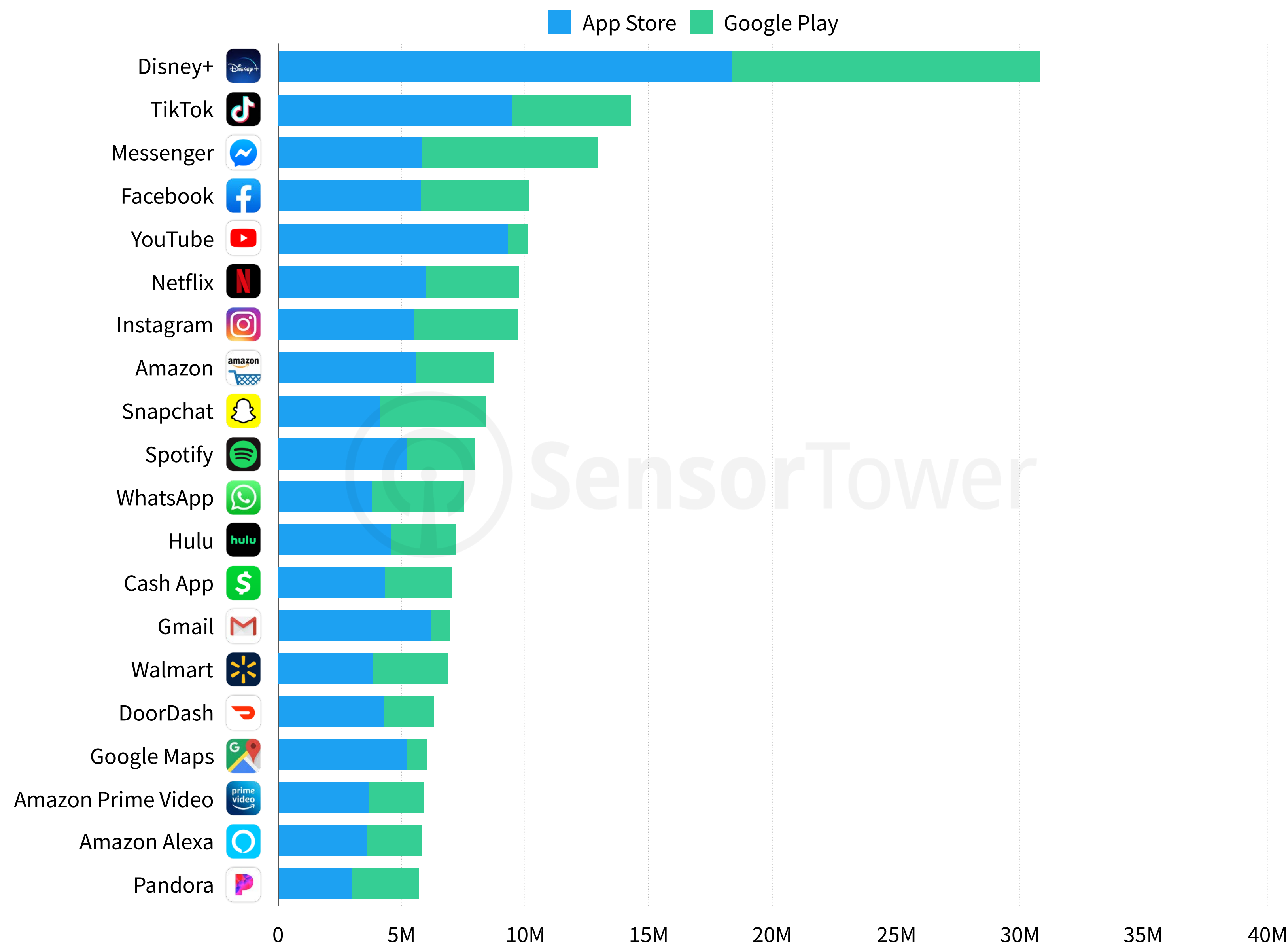
27% Q/Q growth boosted it past Messenger for the first time.

Club Factory continued its meteoric rise to reach the top 10, after ranking No. 20 in 3Q19. Only WhatsApp and TikTok had more downloads in India during 4Q19.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for Google Play for Oct. 1 through Dec. 31, 2019. 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.

Overall - United States

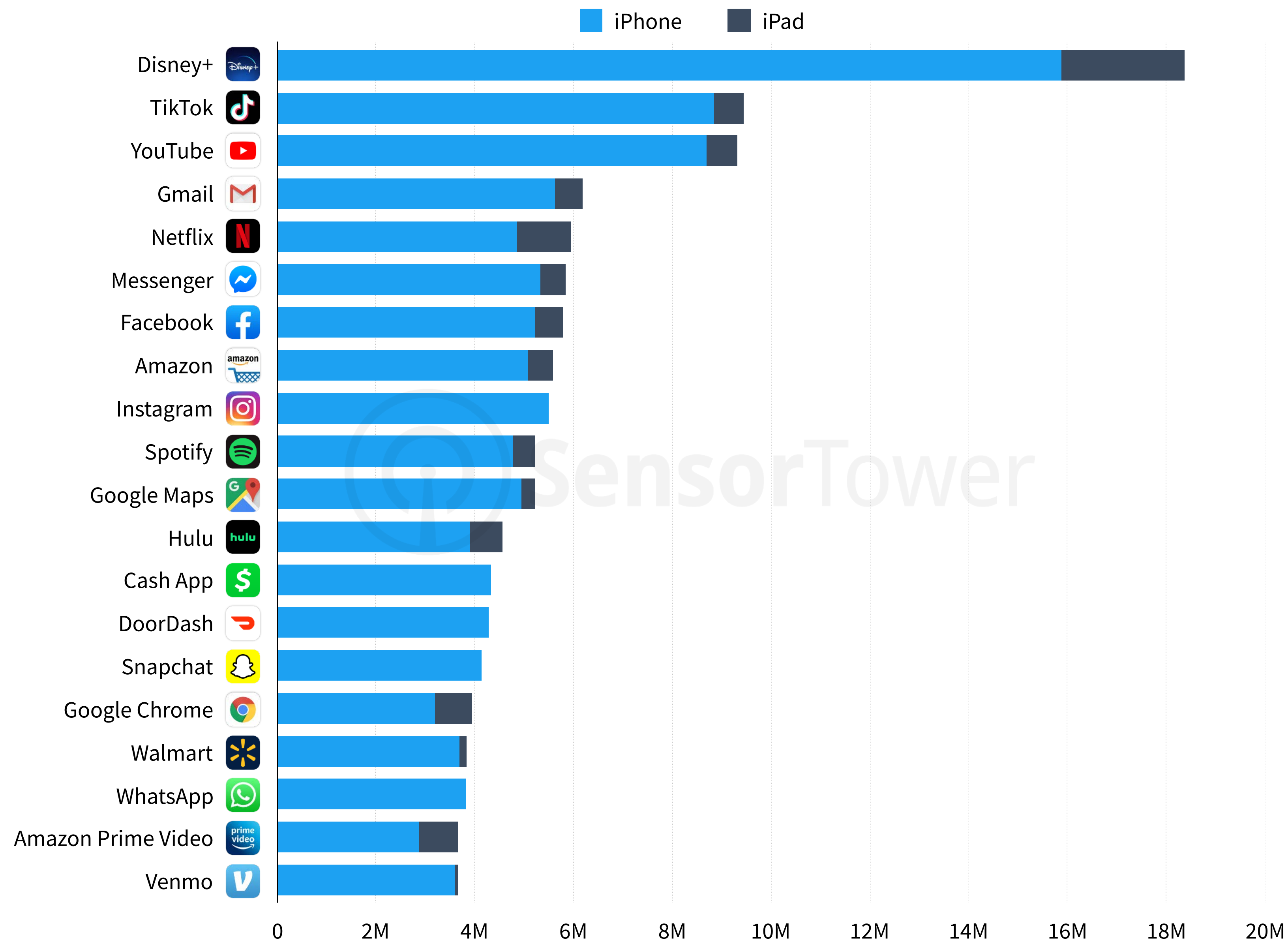


The launch of Disney+ in mid-November was unprecedented in the U.S. Its 31 million downloads in Q4 2019 was more than double the total for the next closest app, TikTok.

The holidays had an impact on U.S. download trends in Q4 2019, with Black Friday and Christmas providing boosts to top shopping apps. Walmart and Amazon Alexa reached the top 20 for the first time since Q4 2018.

Note Regarding Download Estimates
Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Oct. 1 through Dec. 31, 2019. 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.

App Store - United States



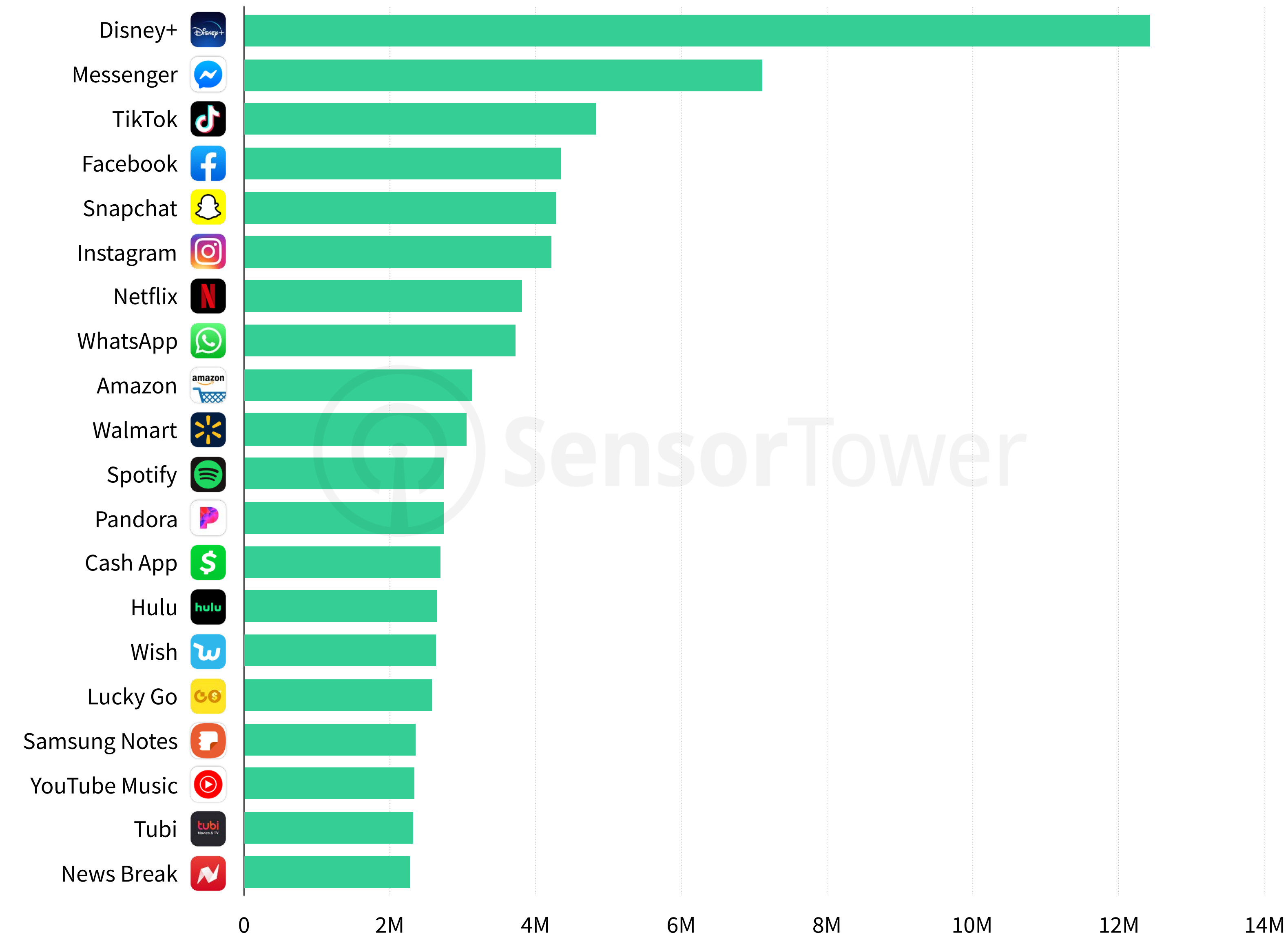
Disney+ was also the top app on the App Store in the U.S. It ended YouTube's four-quarter run at No. 1.

TikTok downloads on the U.S. App Store grew 83% Y/Y to nearly 10 million in 4Q19. TikTok has shifted focus from Google Play to the App Store in recent quarters: 66% of U.S. installs were from the App Store, with 34% from Google Play in 4Q19. The App Store comprised only 36% of installs in 4Q18.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Oct. 1 through Dec. 31, 2019. Apple apps are excluded. We report unique installs only (one download per user). Figures represent aggregate installs of all app versions, ex: Facebook and Facebook Lite.

Google Play - United States



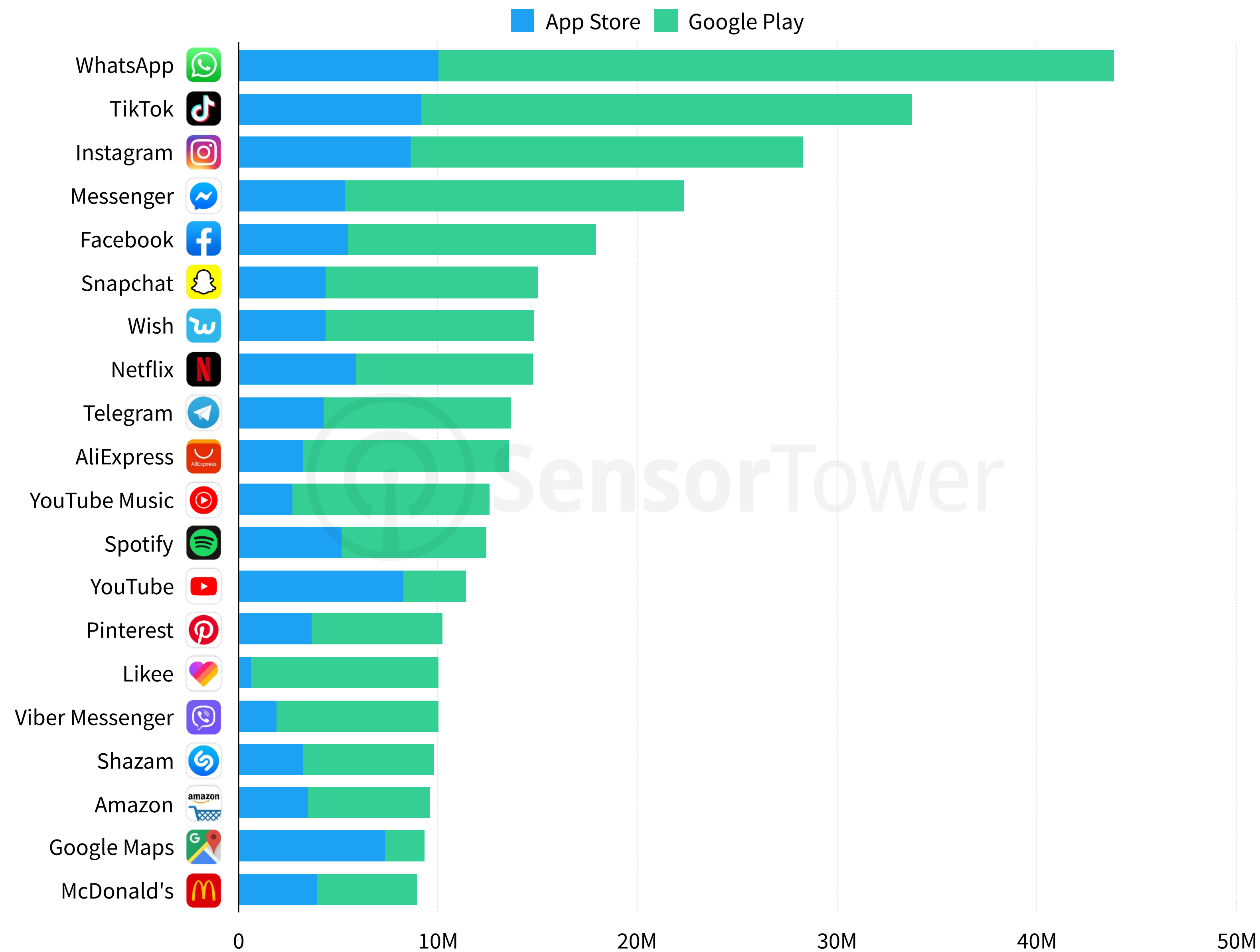
Disney+ had more than 12 million U.S. installs in Q4 2019. No app had surpassed 10 million U.S. downloads on Google Play in a quarter since Messenger in 2017.

Walmart had its best quarter in the U.S. on Google Play, reaching the top 10. Its 6.9 million downloads were a 14% increase Y/Y.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for Google Play for Oct. 1 through Dec. 31, 2019. 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.

Overall - Europe



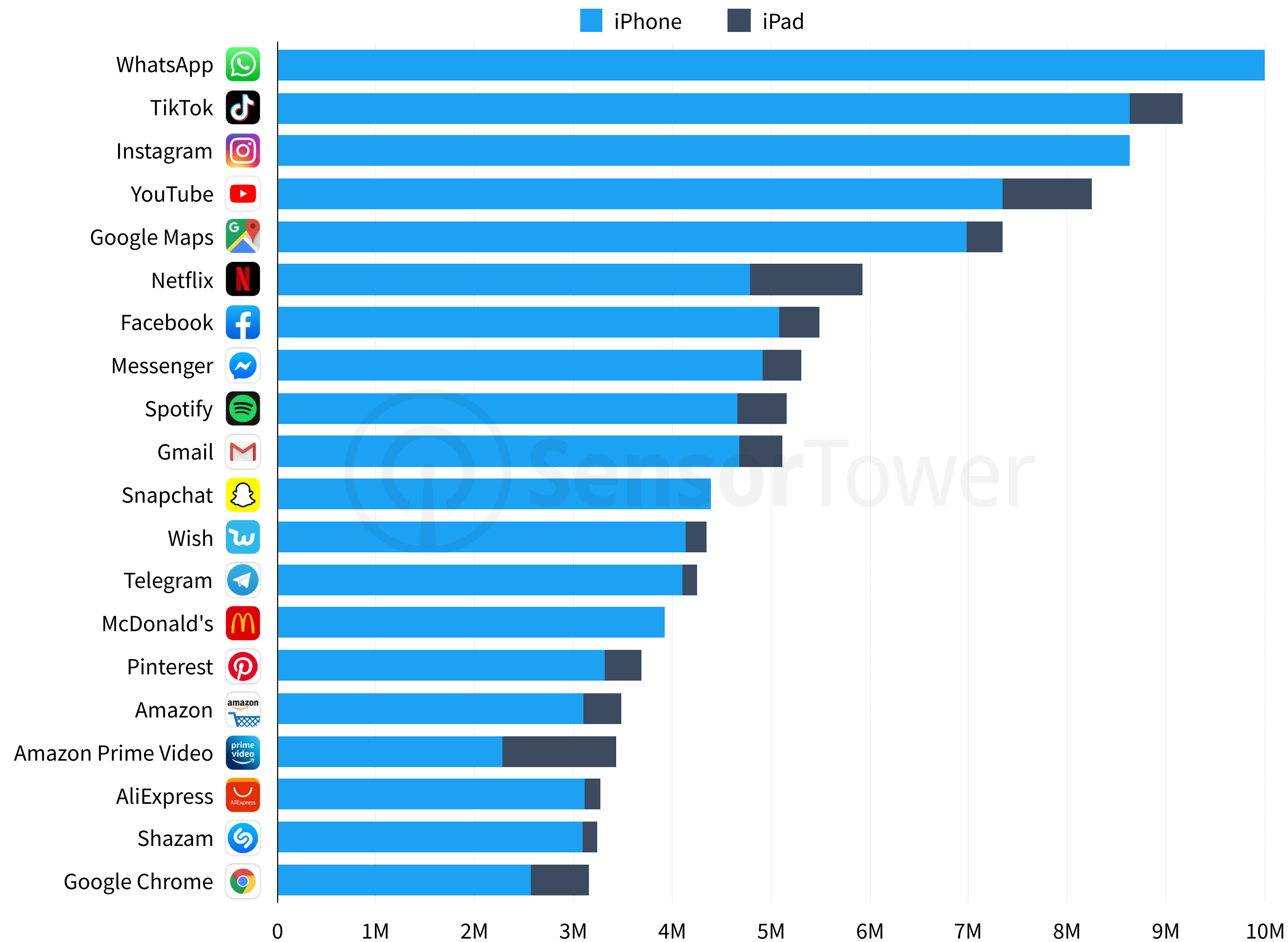
Facebook once again owned four of the top five apps in Europe. In 3Q19, FaceApp ranked No. 5, pushing the Facebook app to No. 6 overall.

Shopping apps also had a strong quarter in Europe. Wish (No. 7), AliExpress (10), and Amazon (18) were among the top 20 in 4Q19, with higher rankings compared to the 3Q19.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Oct. 1 through Dec. 31, 2019. 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.

App Store - Europe



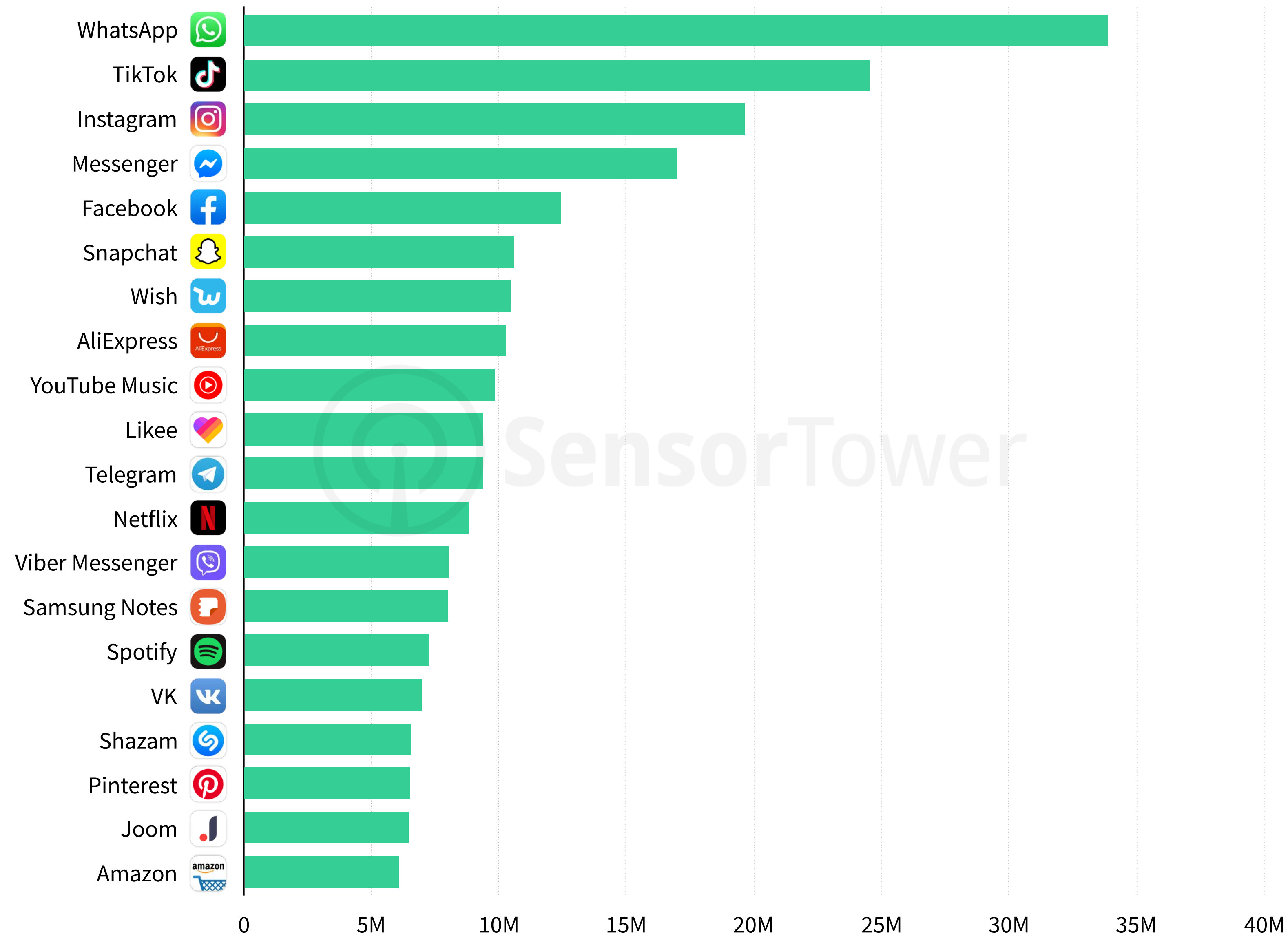
Facebook and Google each owned four of the top 20 App Store apps in 4Q19. They were also the top two publishers in Europe during the quarter.

Amazon Prime Video reached a new high in Europe in 4Q19 with 3.4 million App Store downloads. This was nearly 50% growth from its previous high in 3Q19.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Oct. 1 through Dec. 31, 2019. Apple apps are excluded. We report unique installs only (one download per user). Figures represent aggregate installs of all app versions, ex: Facebook and Facebook Lite.

Google Play - Europe



WhatsApp was the top installed app in many European countries, including Great Britain, France, Germany, and Russia.

Strong growth in Turkey and Russia helped it achieve 9% Y/Y growth.

TikTok had its best quarter in Europe on Google Play, with nearly 25 million downloads. Russia, Turkey, and Italy were its top European markets for the quarter.

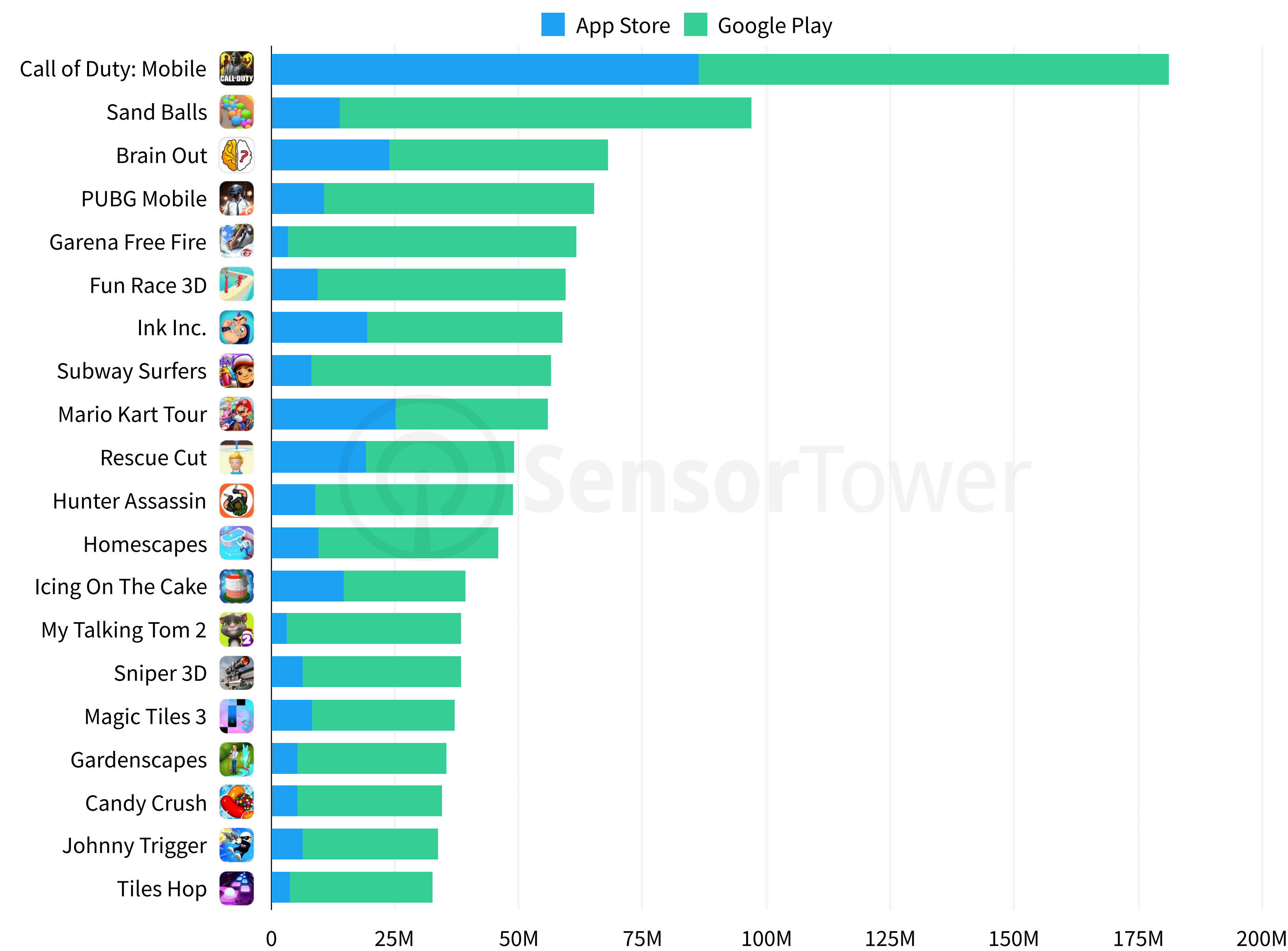
Note Regarding Download Estimates

Our estimates include worldwide daily download totals for Google Play for Oct. 1 through Dec. 31, 2019. 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.

A dimly lit arcade with various games. On the left, a Monopoly board game is visible. In the center, several 'KING OF GAMES' machines are lined up. On the right, a 'HOT SPOT' machine with a 'WIN BIG MONEY!' sign is prominent. The scene is dark with colorful game lights providing the main illumination.

Top Games

Overall - Worldwide

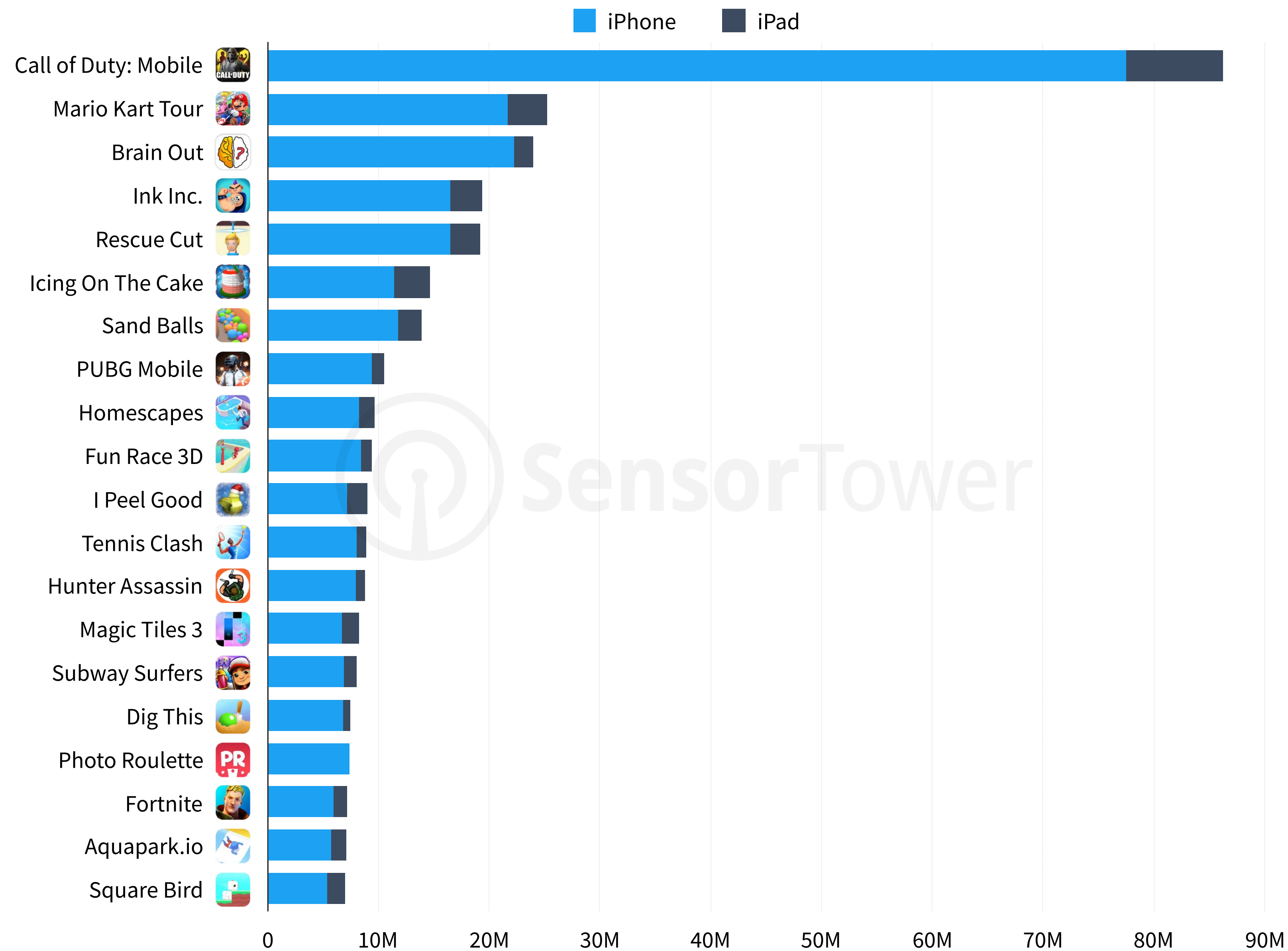


Call of Duty: Mobile had more than 180 million downloads in Q4 2019 across the App Store and Google Play Store. This was the best quarter for a game since Pokémon GO’s launch in Q3 2016.

Mobile gaming remained competitive in Q4 2019. No publisher had more than three games among the top 20, and only Lion Studios, Playrix, and Amanotes had multiple titles in the top 20.

Note Regarding Download Estimates
Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Oct. 1 through Dec. 31, 2019. 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.

App Store - Worldwide



Call of Duty: Mobile surpassed 80 million App Store installs in Q4 2019, more than three times the next best game's total.

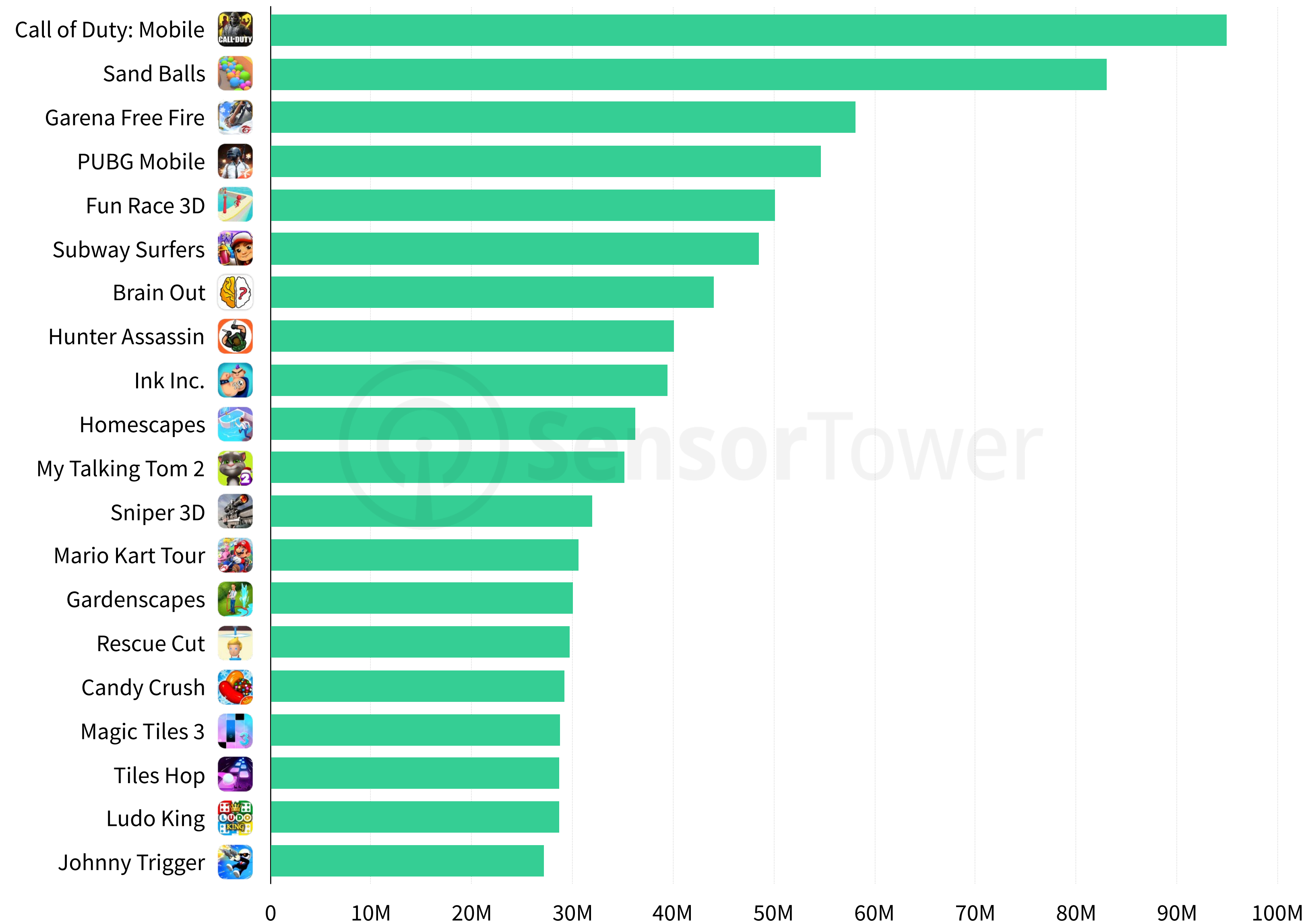
Mario Kart Tour came in at No. 2 after taking the top spot last quarter.

After two quarters outside the top 20, Fortnite reached No. 18 in Q4 2019 with an 8% growth quarter-over-quarter. It was Fortnite's first quarter of positive growth Q/Q since it launched back in 2018.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Oct. 1 through Dec. 31, 2019. Apple apps are excluded. We report unique installs only (one download per user). Figures represent aggregate installs of all app versions, ex: Facebook and Facebook Lite.

Google Play - Worldwide



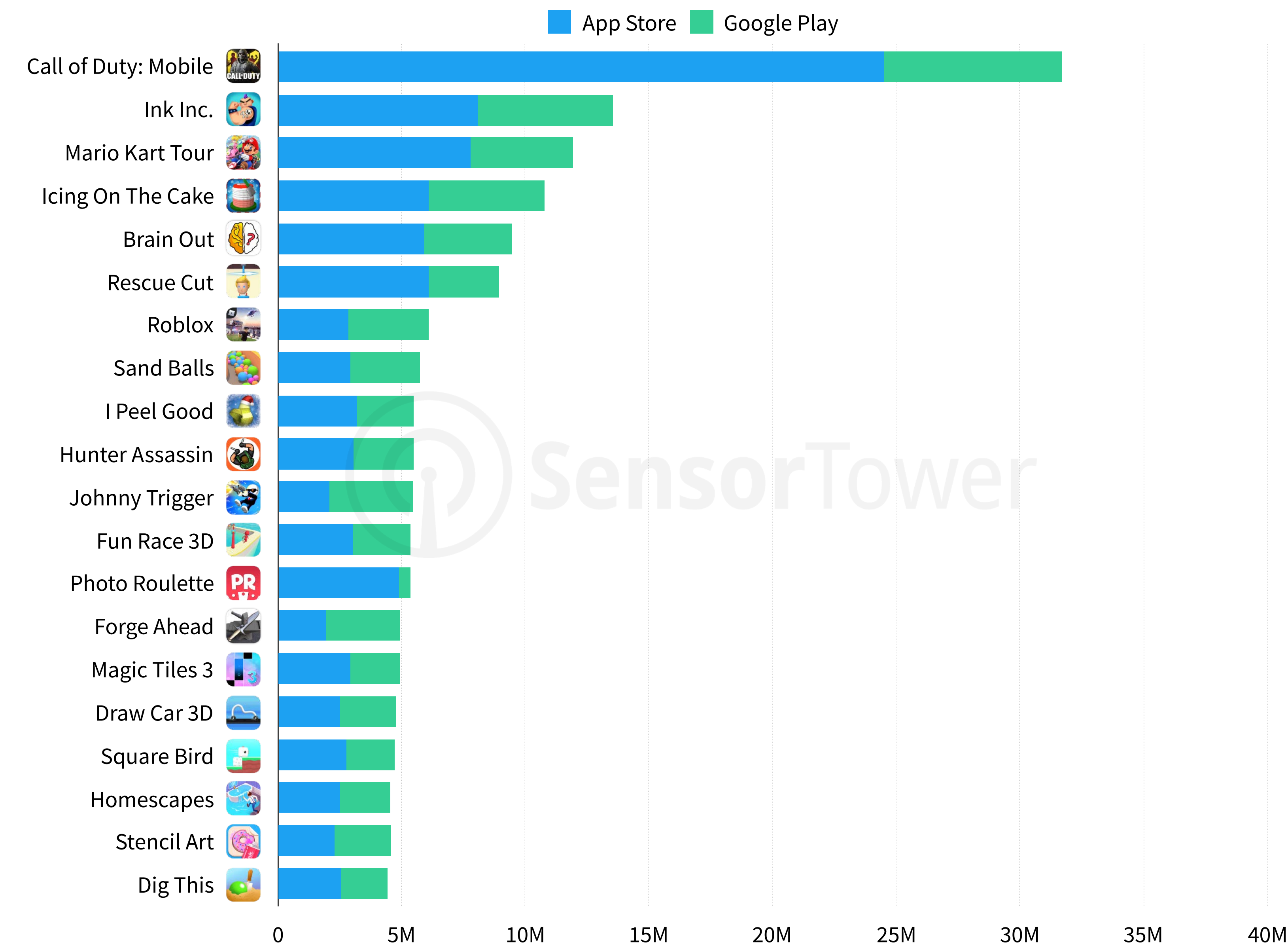
Call of Duty: Mobile was also the top game on Google Play, though the margin between it and the No. 2 game was much closer than on the App Store. Sand Balls from Say Games and Garena Free Fire from Garena rounded out the top three.

Candy Crush reentered the top 20 at No. 16 (it was No. 23 in 3Q19). Its downloads increased about 6% Y/Y.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for Google Play for Oct. 1 through Dec. 31, 2019. 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.

Overall - United States



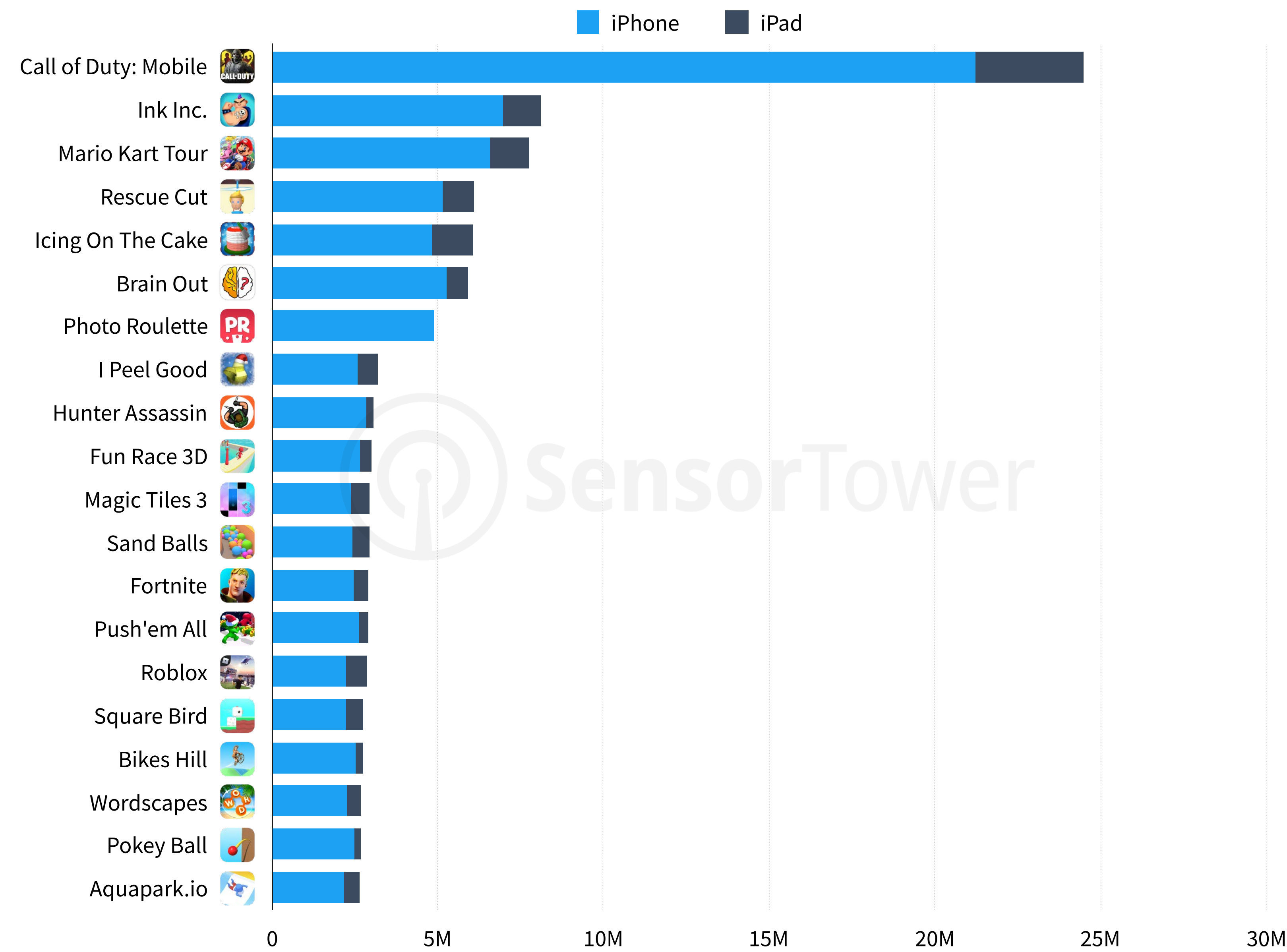
Call of Duty: Mobile was also well ahead of all other games in the U.S., surpassing 30 million downloads in the quarter.

Nintendo’s Mario Kart Tour and two games from Lion Studios reached 10 million installs.

AppLovin’s game division, Lion Studios, had five of the top 20 games in the U.S., including Ink Inc. (No. 2), Icing on the Cake (4), I Peel Good (9), Forge Ahead (14), and Stencil Art (19).

Note Regarding Download Estimates
Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Oct. 1 through Dec. 31, 2019. 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.

App Store - United States

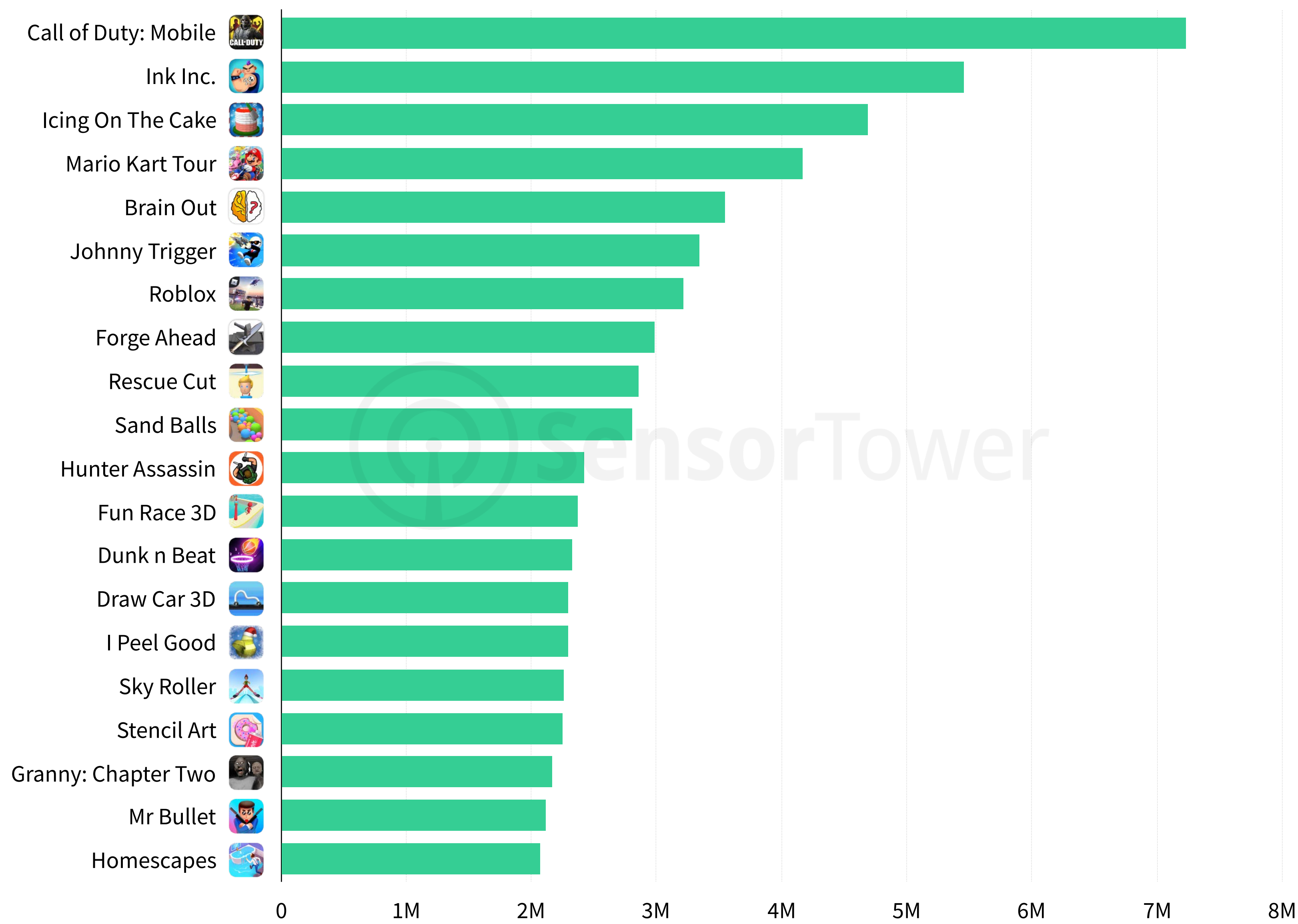


Call of Duty: Mobile netted more than double the downloads of No. 1 games in prior quarters, with 25 million installs. Mario Kart Tour and AMAZE had less than 9 million downloads and reached No. 1 in 3Q19 and 2Q19, respectively.

Fortnite was the No. 13 App Store game in the U.S. during 4Q19. It last appeared among the top 20 at No. 11 in 1Q19.

Note Regarding Download Estimates
Our estimates include worldwide daily download totals for iPhone and iPad for Oct. 1 through Dec. 31, 2019. Apple apps are excluded. We report unique installs only (one download per user). Figures represent aggregate installs of all app versions, ex: Facebook and Facebook Lite.

Google Play - United States

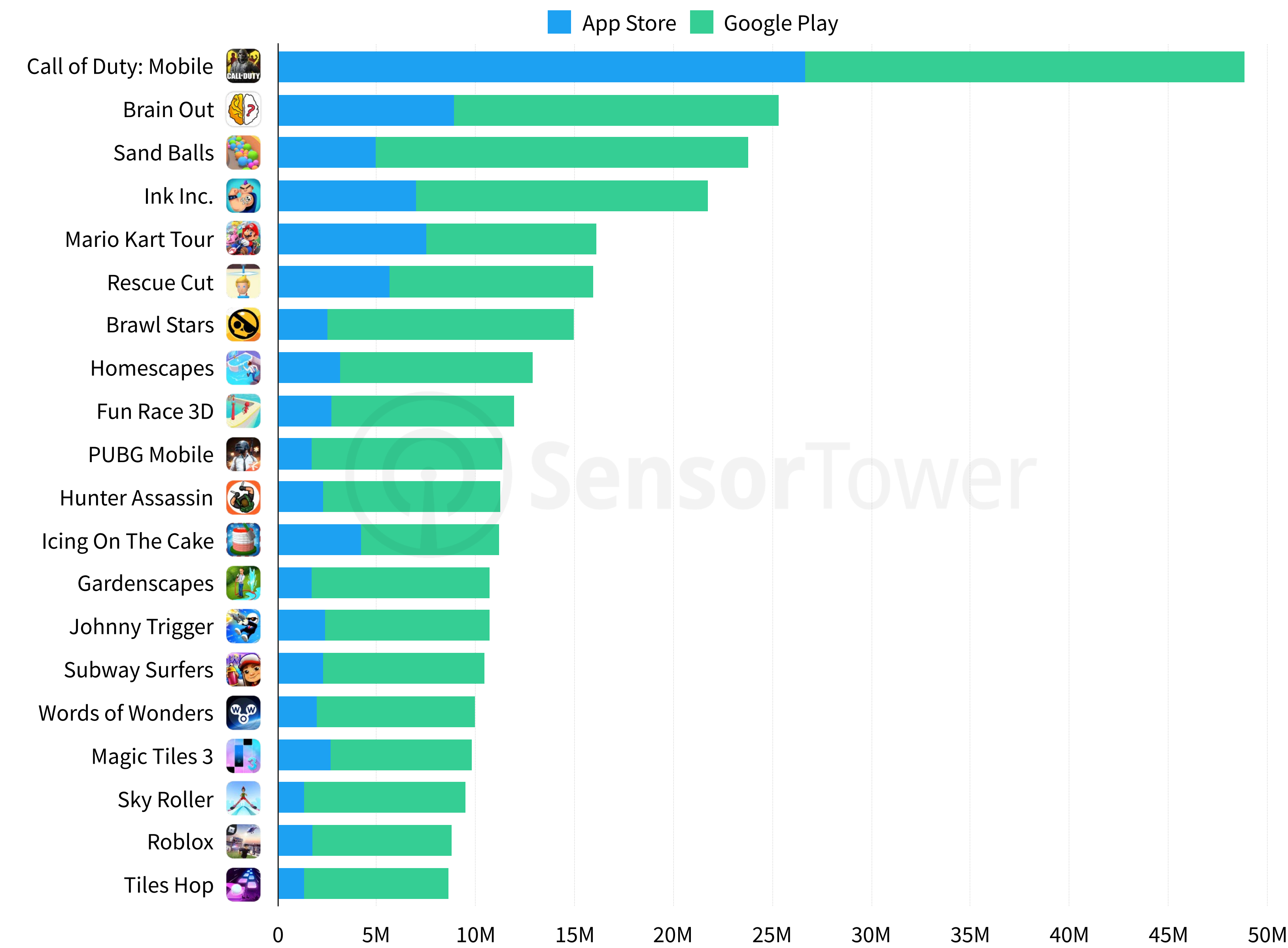


The prevalence of hyper-casual games created a lot of turnover among top games. Fun Race 3D and Mr Bullet were the only hyper-casual games to return to the top 20 in Q4 2019.

AppLovin’s Lion Studios had six of the top 20 games on Google Play. AppLovin had more U.S. downloads than Facebook and Voodoo in Q4 2019.

Note Regarding Download Estimates
Our estimates include worldwide daily download totals for Google Play for Oct. 1 through Dec. 31, 2019. 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.

Overall - Europe

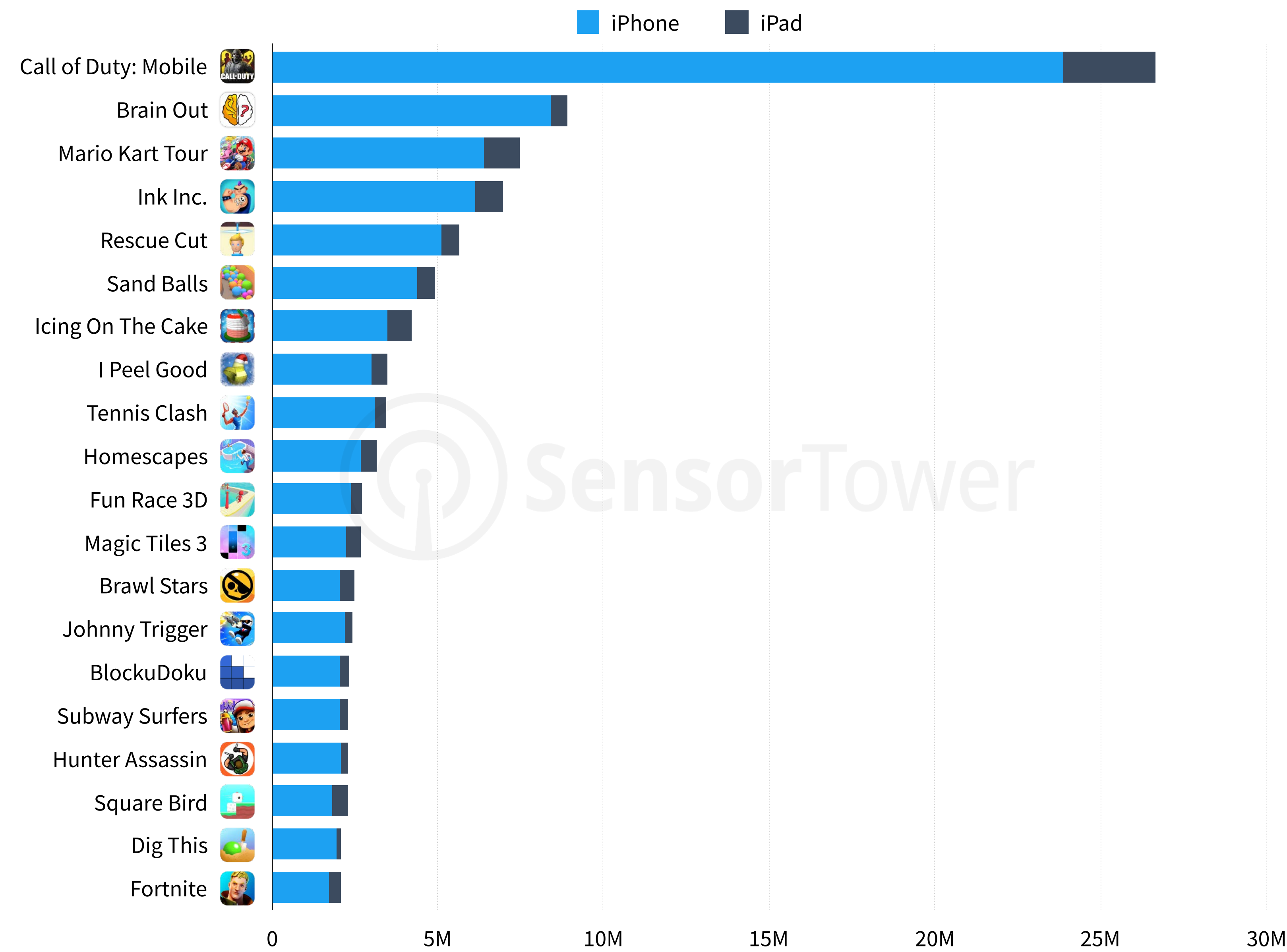


Call of Duty: Mobile led the way in Europe, with nearly 50 million downloads in Q4 2019. Its download total nearly reached that of the next two games (Brain Out from Eyewind and Sand Balls from Say Games) combined.

Brawl Stars remained popular in Europe, ranking No. 7 last quarter. It was also No. 7 in Q3, behind Mario Kart Tour and several hyper-casual games.

Note Regarding Download Estimates
Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Oct. 1 through Dec. 31, 2019. 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.

App Store - Europe

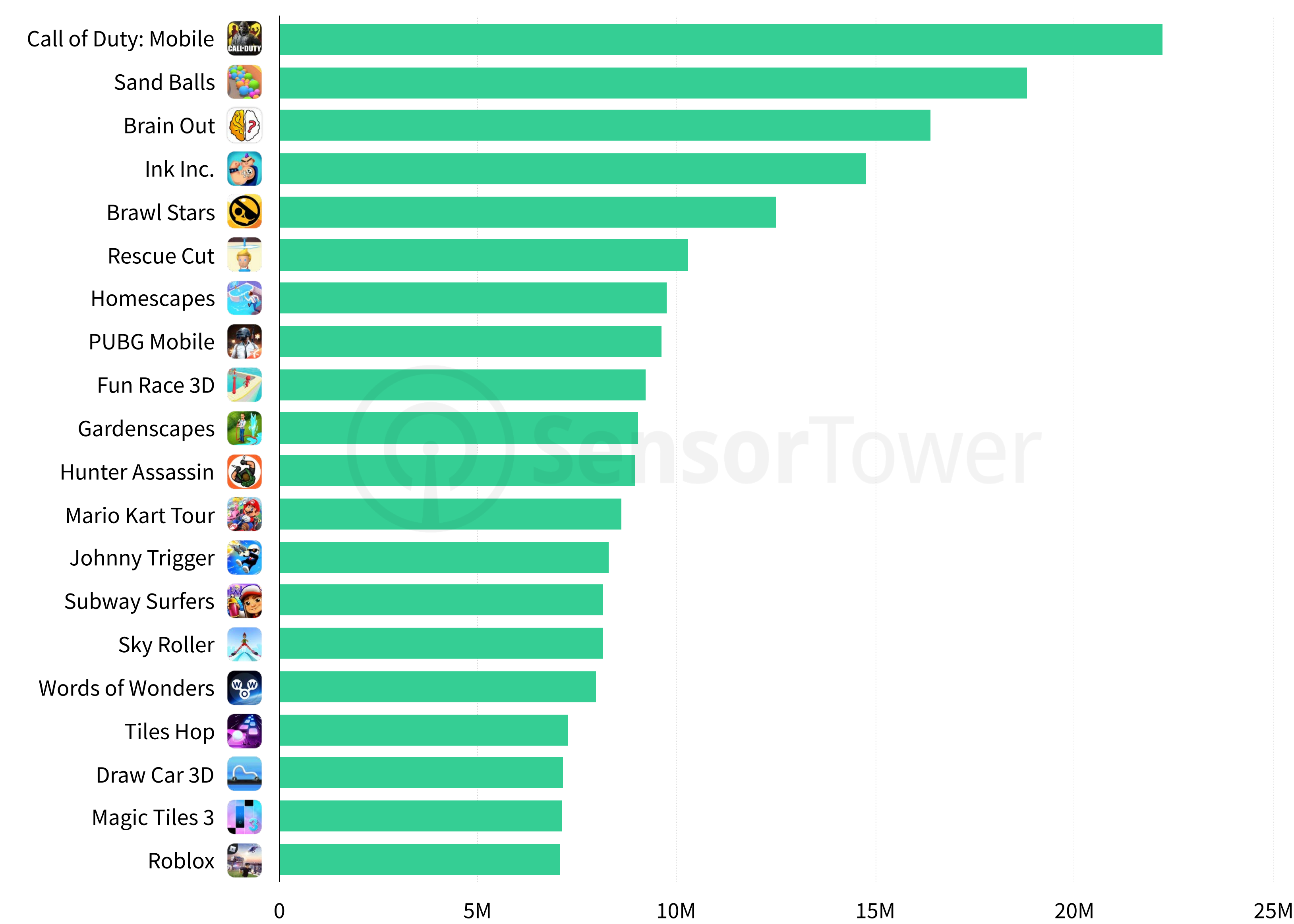


Call of Duty: Mobile’s Q4 performance dwarfed Mario Kart Tour’s from the quarter prior, surpassing 25 million downloads. Mario Kart Tour netted just under 10 million downloads in Europe in Q3.

Despite PUBG Mobile and Garena Free Fire’s global success, Fortnite was the top battle royale App Store game in Europe in 4Q19. It was only battle royale game to reach the top 20.

Note Regarding Download Estimates
Our estimates include worldwide daily download totals for iPhone and iPad for Oct. 1 through Dec. 31, 2019. Apple apps are excluded. We report unique installs only (one download per user). Figures represent aggregate installs of all app versions, ex: Facebook and Facebook Lite.

Google Play - Europe



Playrix had two of the top 10 games on Google Play in Q4 2019, with Homescapes and Gardenscapes ranking at No. 7 and 10, respectively. Each moved up a few spots from the previous quarter.

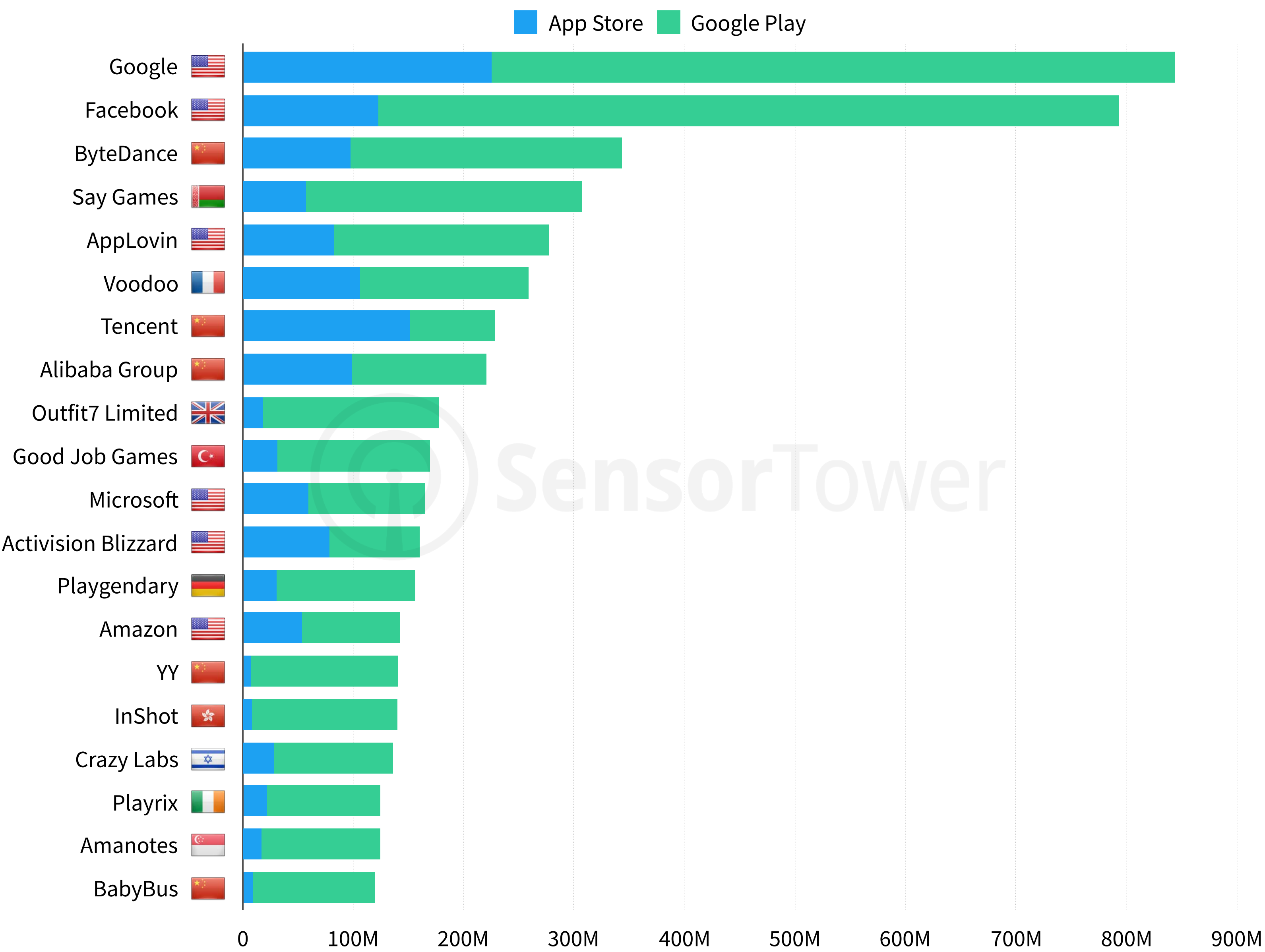
While Fortnite was the most popular battle royale App Store game, success in Turkey and Russia helped PUBG Mobile reach the top 10 games on Google Play. Fortnite is not available on Google Play.

Note Regarding Download Estimates
Our estimates include worldwide daily download totals for Google Play for Oct. 1 through Dec. 31, 2019. We report unique installs only (one download per User). Google preinstalled apps are excluded. Android download estimates do not include third-party stores. Figures represent aggregate installs of all app versions, ex: Facebook and Facebook Lite.



Top Publishers

Overall - Worldwide

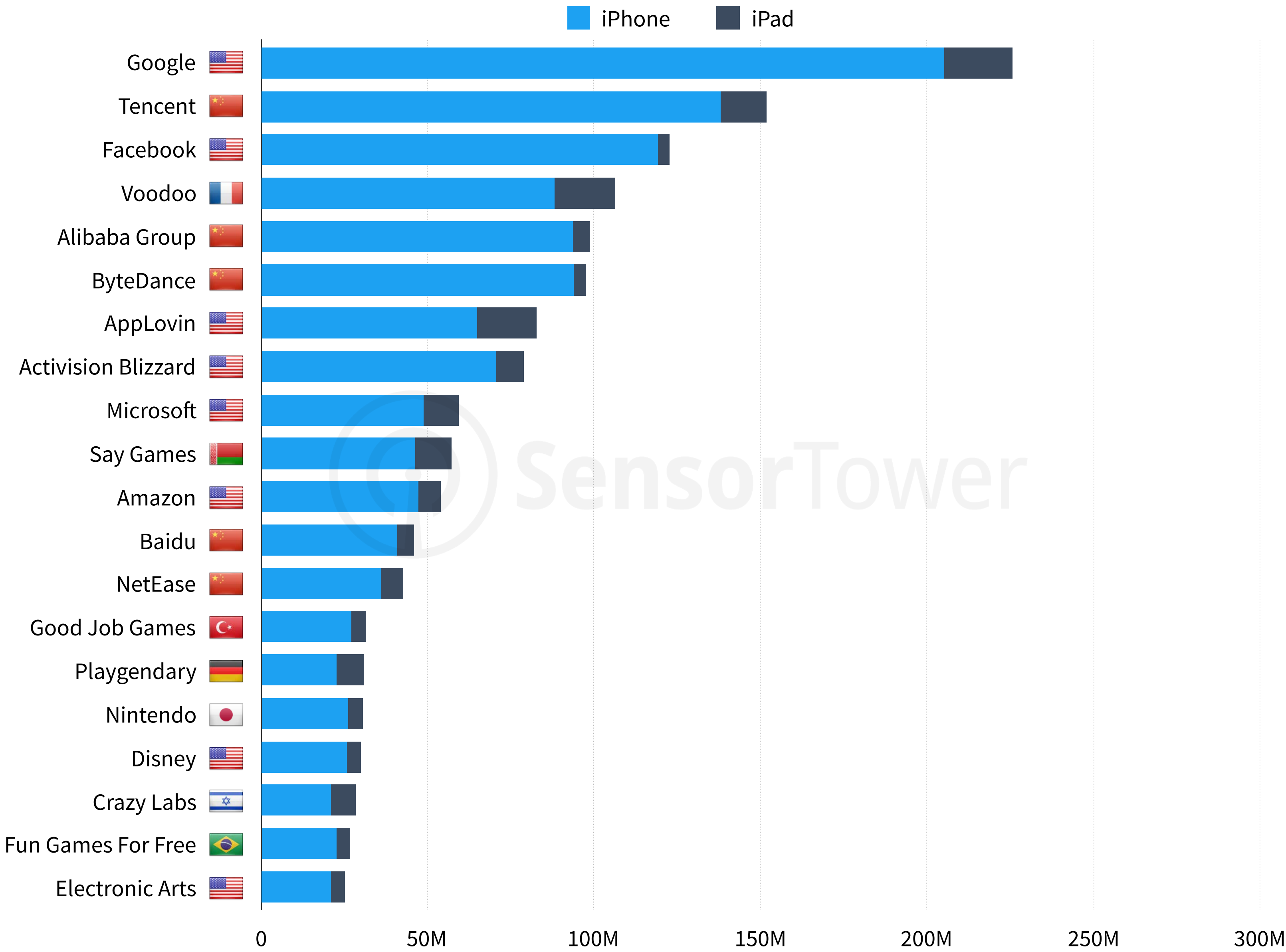


Google passed Facebook to become the top global publisher in Q4 2019. This was the first time Google had more downloads than Facebook in more than five years.

A strong quarter from TikTok propelled ByteDance to No. 3 in 4Q19. It had ranked outside the top five in Q2 and Q3 2019.

Note Regarding Download Estimates
Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Oct. 1 through Dec. 31, 2019. 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

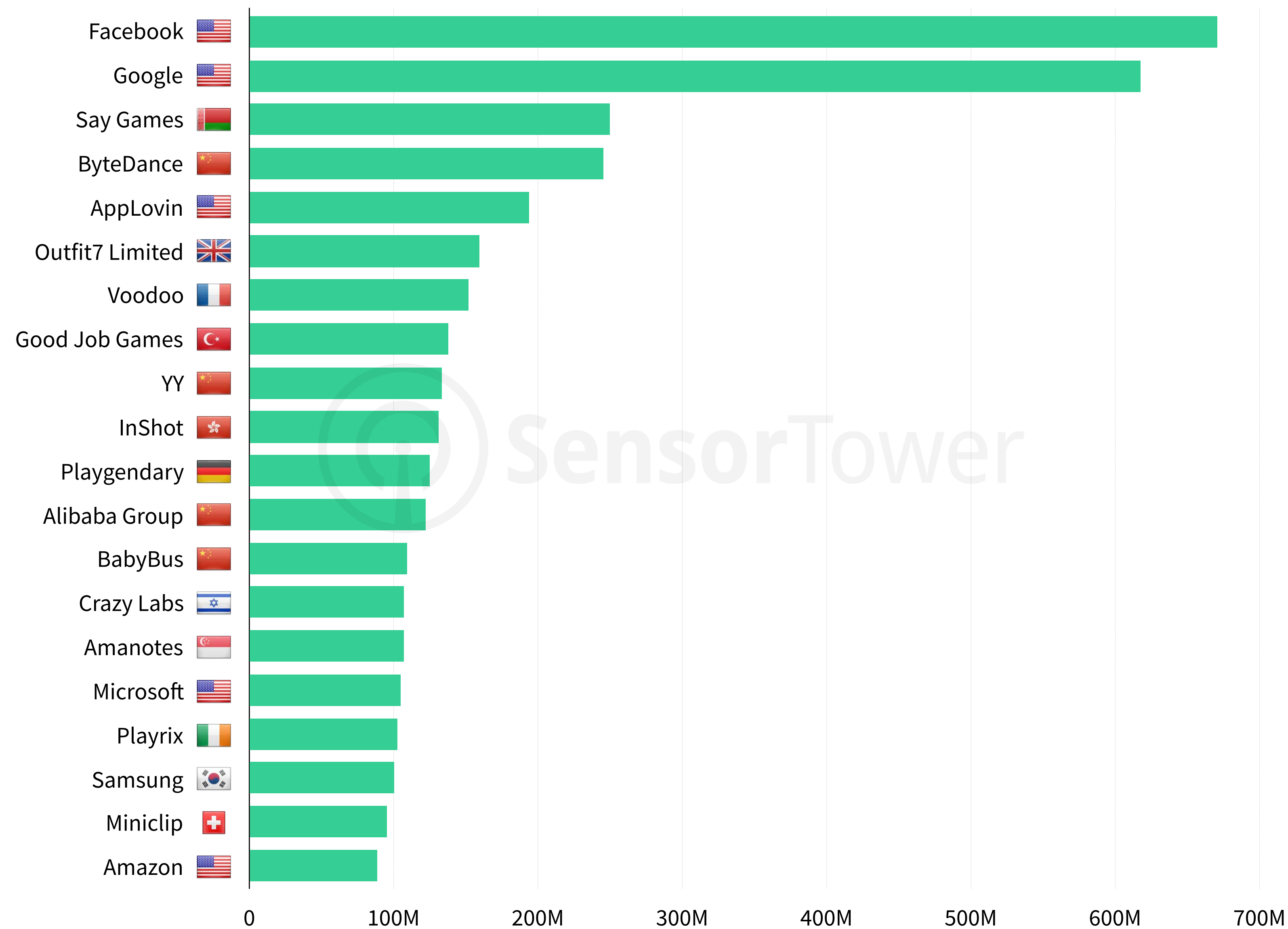


The top four publishers were the same as 3Q19 led by Google, Tencent, and Facebook. Alibaba Group moved up one position to No. 5.

Activision Blizzard, publisher of hit game Call of Duty: Mobile, ranked No. 8 in 4Q19, ahead of publishers such as Microsoft and Amazon. Call of Duty: Mobile was responsible for more than 97% of its installs.

Note Regarding Download Estimates
Our estimates include worldwide daily download totals for iPhone and iPad for Oct. 1 through Dec. 31, 2019. Apple apps are excluded. We report unique installs only (one download per User).

Google Play - Worldwide



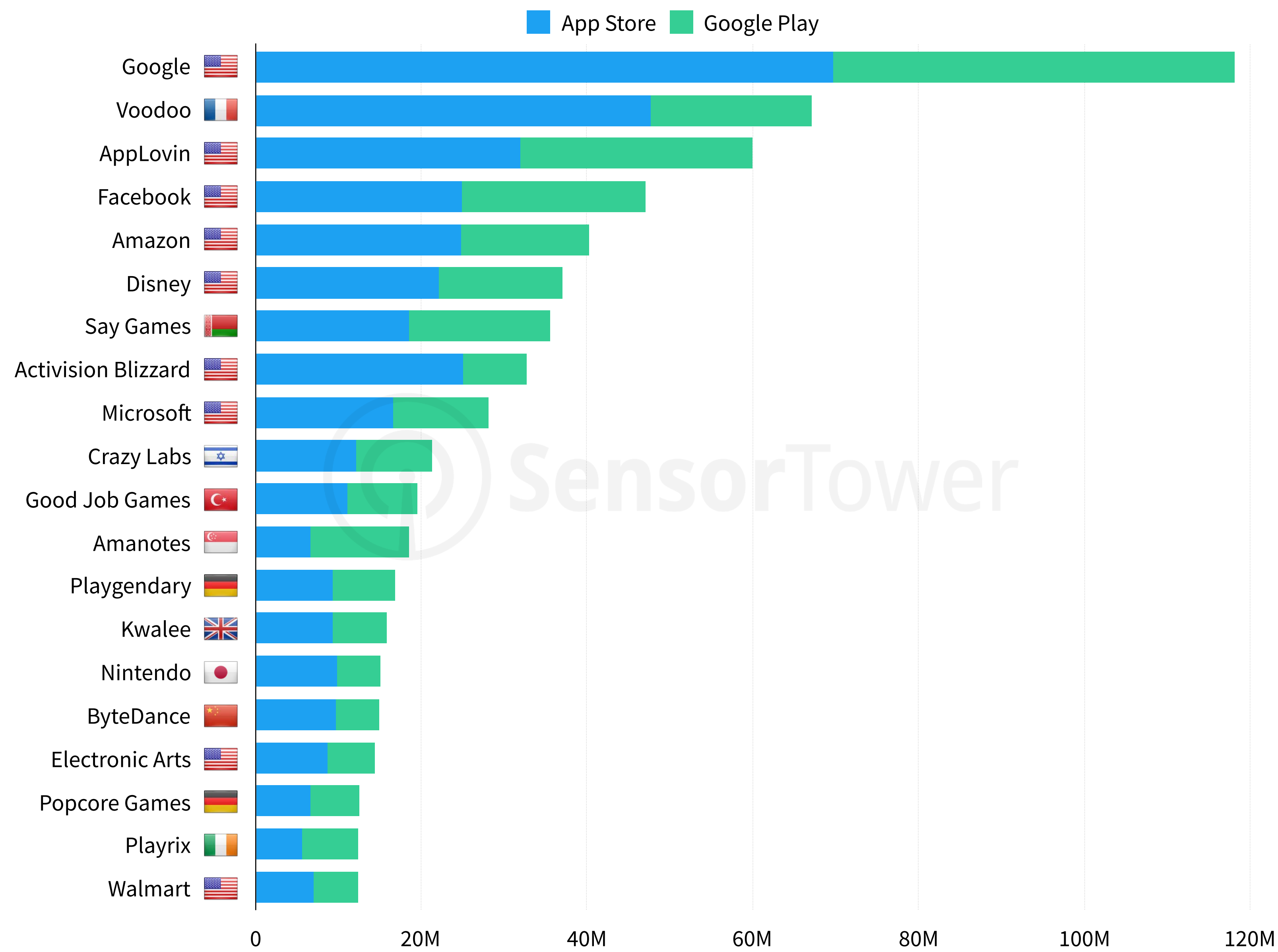
Facebook stayed ahead of Google on Google Play. The gap between the publishers was only 53 million in Q4 2019, compared to a gap of 239 million in Q4 2018.

Amazon reached the top 20 on Google Play for the first time since a year prior. Amazon Prime Video and Amazon Alexa had very strong December numbers going into 2020.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for Google Play for Oct. 1 through Dec. 31, 2019. 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



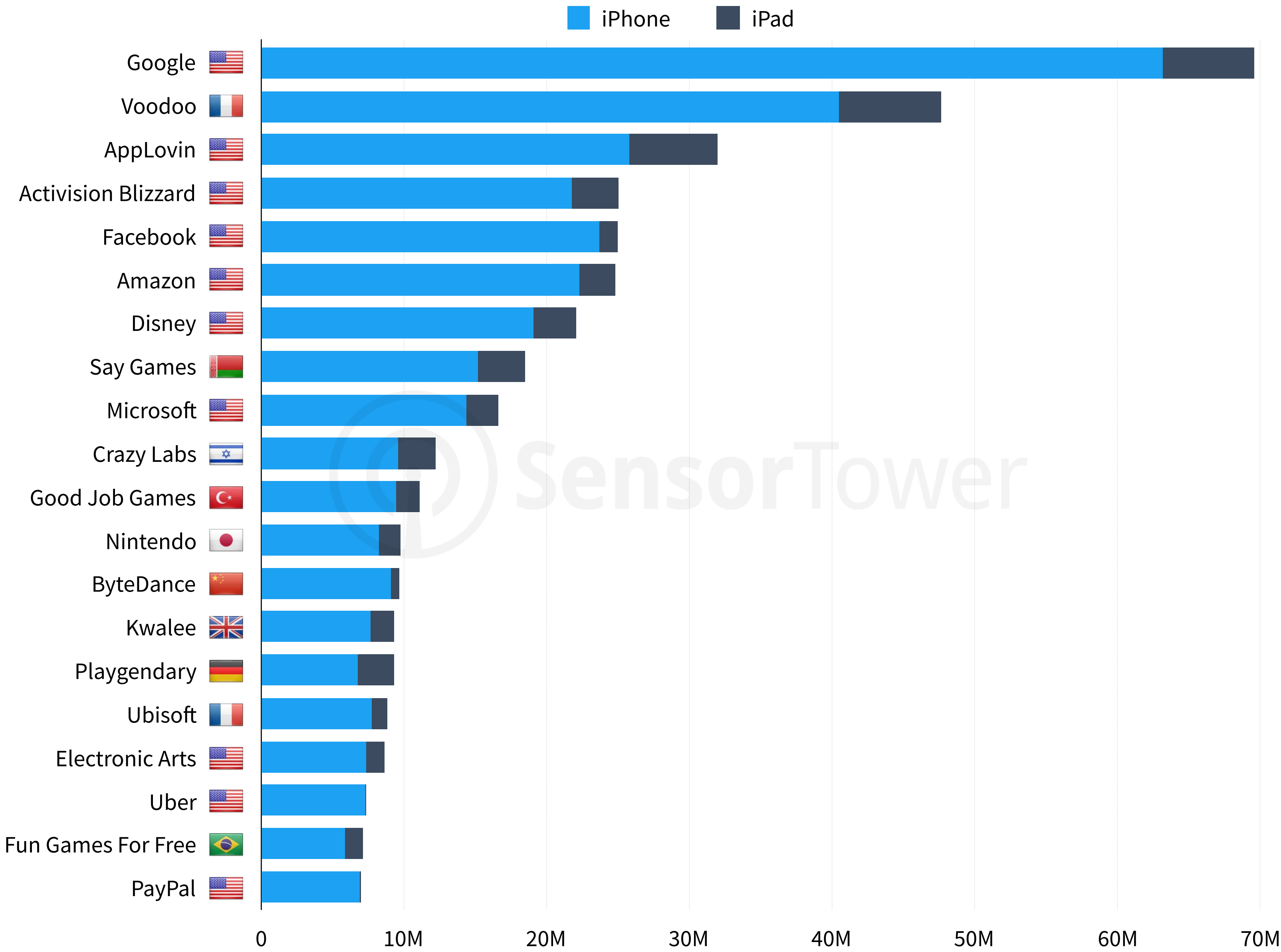
A few top apps helped publishers to excel in Q4 2019. Disney (No. 6) and Activision Blizzard (8) were buoyed by the launches of Disney+ and Call of Duty: Mobile, respectively

Seven of the top 10 publishers are U.S.-based. Voodoo, Say Games, and Crazy Labs were the only non-U.S. publishers to crack the top 10 in 4Q2019.

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

Q4 Publishers by U.S. Downloads

App Store - United States

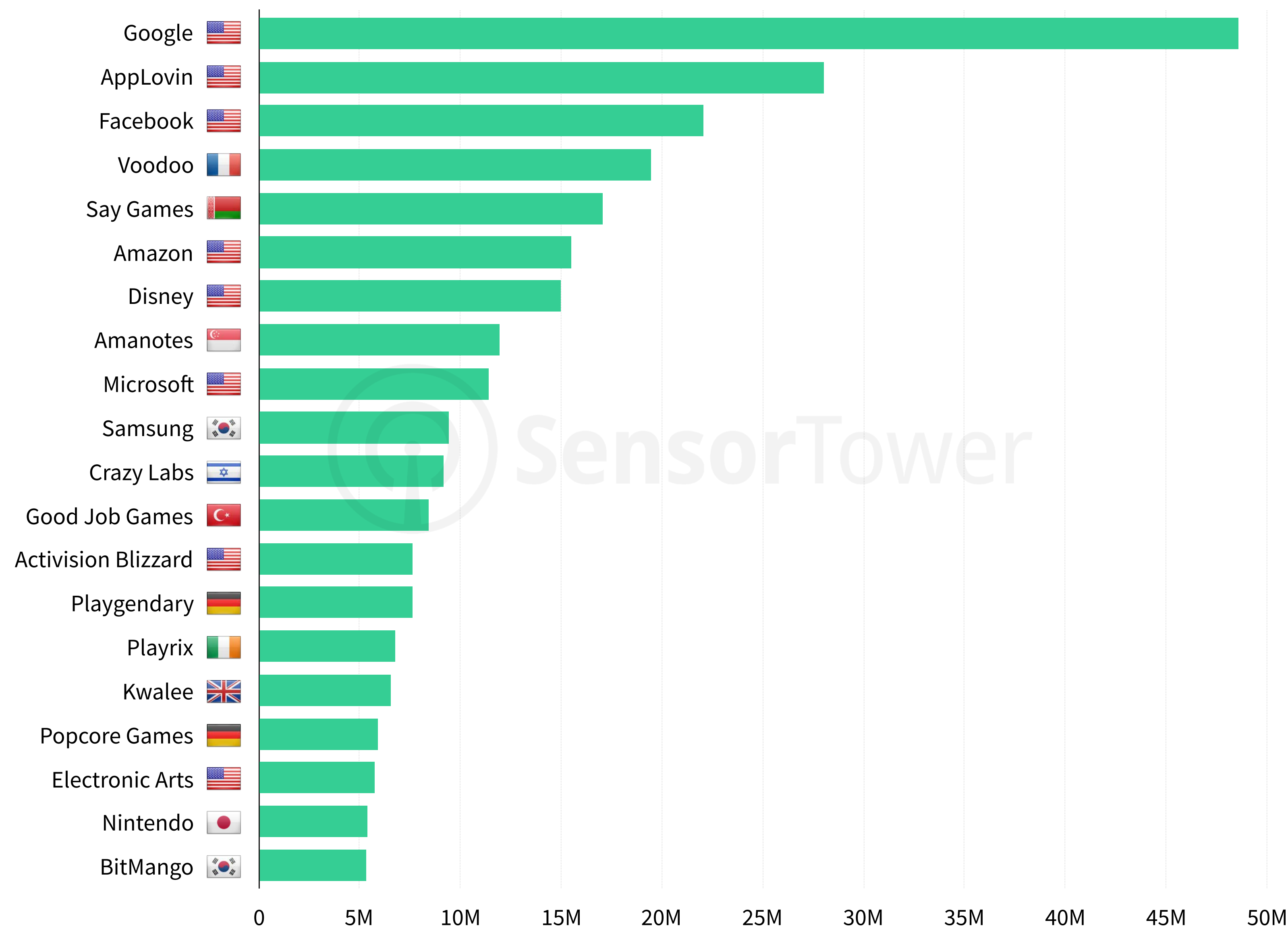


AppLovin and Activision Blizzard joined Google, Voodoo, and Facebook among the top five in Q4 2019. AppLovin was ranked No. 8 in 3Q19, while Activision Blizzard was outside the top 20.

Mario Kart Tour helped Nintendo reach the top 20 for the second consecutive quarter. It was No. 12 in Q4 2019, after ranking No. 10 the previous quarter.

Note Regarding Download Estimates
Our estimates include worldwide daily download totals for iPhone and iPad for Oct. 1 through Dec. 31, 2019. Apple apps are excluded. We report unique installs only (one download per User).

Google Play - United States

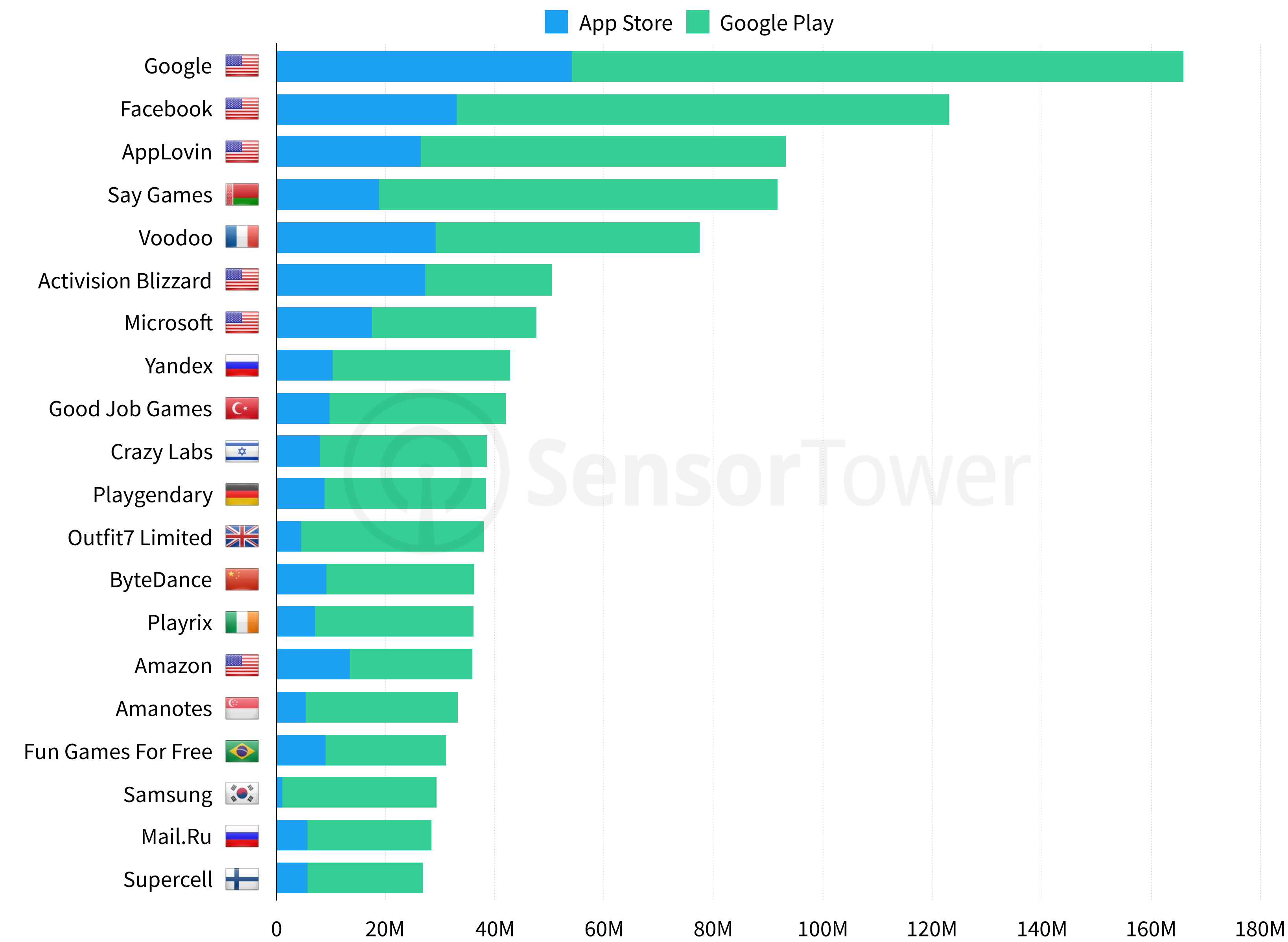


Voodoo’s reign as the top Google Play games publisher in the U.S. ended in Q4 2019, at eight consecutive quarters. AppLovin took the crown in 4Q19.

Disney ranked No. 7 in the U.S. on Google Play. Disney+ accounted for 83% of its downloads in the quarter, followed by FOX NOW (5%) and DisneyNOW (3%).

Note Regarding Download Estimates
Our estimates include worldwide daily download totals for Google Play for Oct. 1 through Dec. 31, 2019. 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

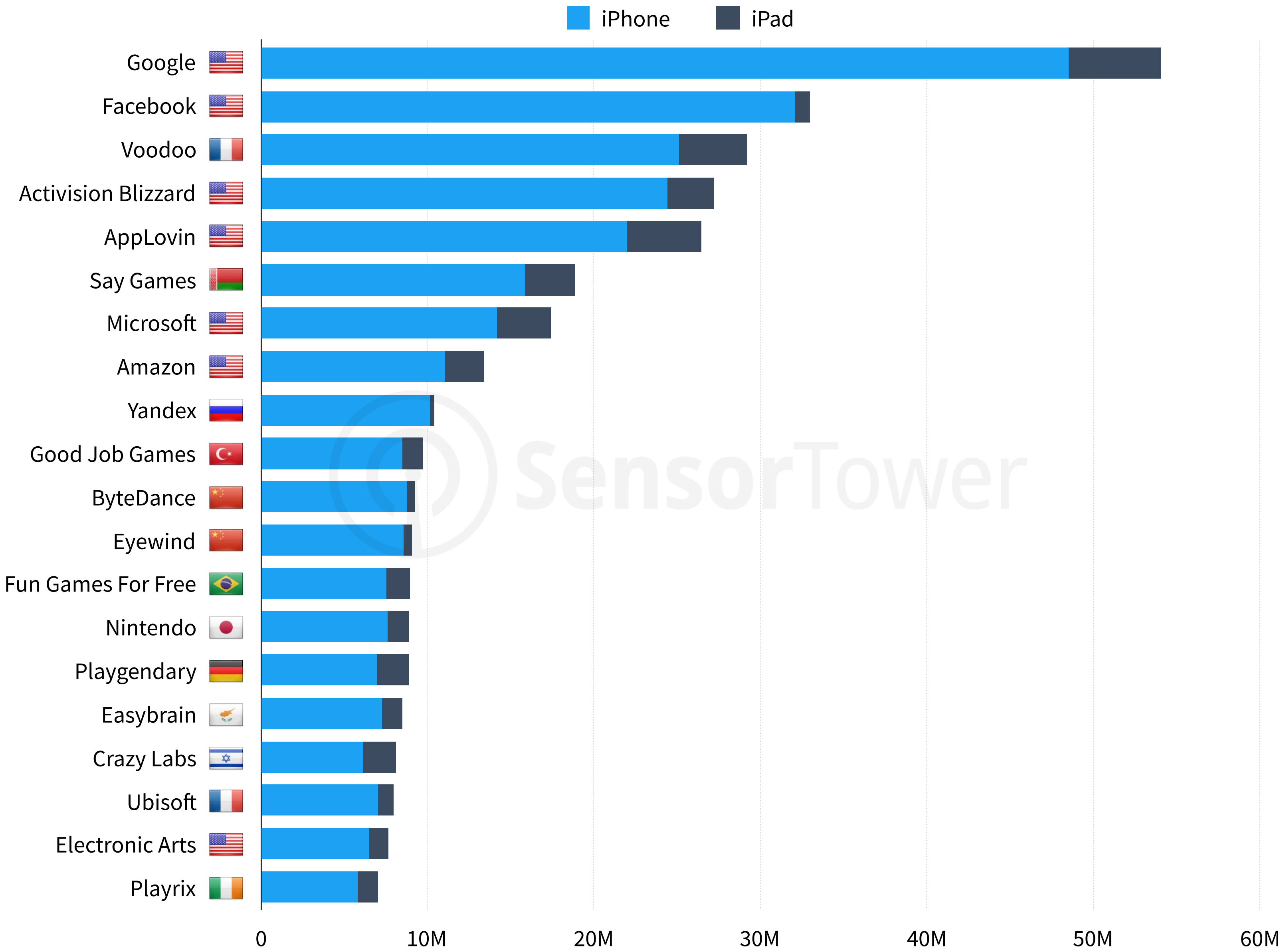


After a quarter behind Google and Belarus-based hyper-casual games publisher Say Games, Facebook returned to the No. 2 spot in Europe. Say Games fell to No. 4, behind AppLovin.

Two Russian publishers made the top 20, including Yandex (No. 8) and Mail.Ru (19). Other European countries such as France, Turkey, Germany, and Great Britain each had one publisher among the top 20.

Note Regarding Download Estimates
Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Oct. 1 through Dec. 31, 2019. 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

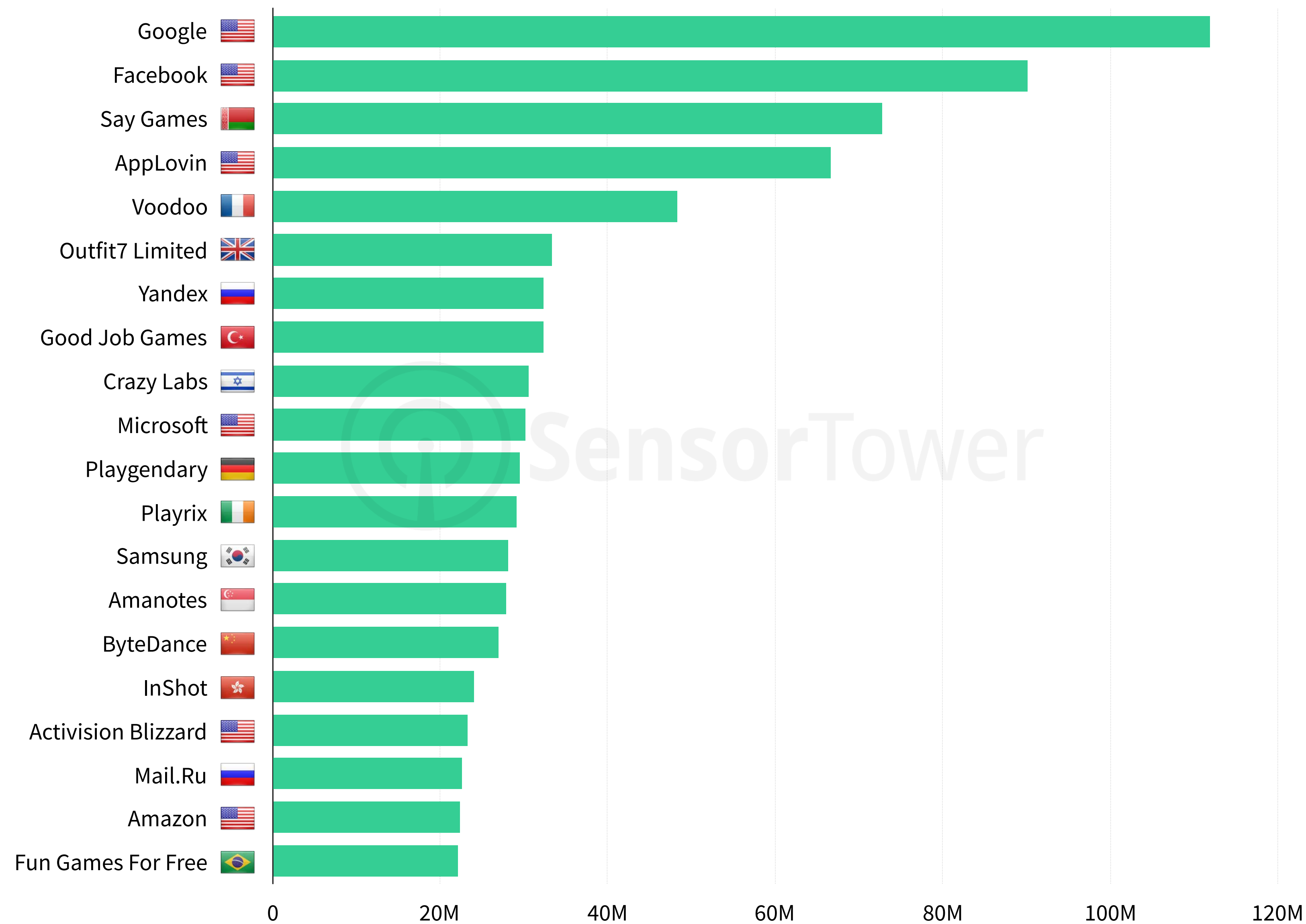


The top three publishers were the same as the previous quarter. Google had 3.8% growth Q/Q, expanding its lead over Facebook to 21 million downloads in 4Q19.

Four of the top five App Store publishers were headquartered in the U.S. Call of Duty: Mobile propelled Activision Blizzard to the top five, while AppLovin was boosted by its hyper-casual games portfolio.

Note Regarding Download Estimates
Our estimates include worldwide daily download totals for iPhone and iPad for Oct. 1 through Dec. 31, 2019. Apple apps are excluded. We report unique installs only (one download per User).

Google Play - Europe



Google had a huge quarter in Europe, breaking the 100-million download mark for the first time with 111 million downloads. This was 26% growth Y/Y.

The top five publishers separated themselves from the competition in 4Q19, with a gap of nearly 15 million downloads between No. 5 (Voodoo) and No. 6 (Outfit7 Limited). AppLovin replaced Good Job Games among the top five this quarter.

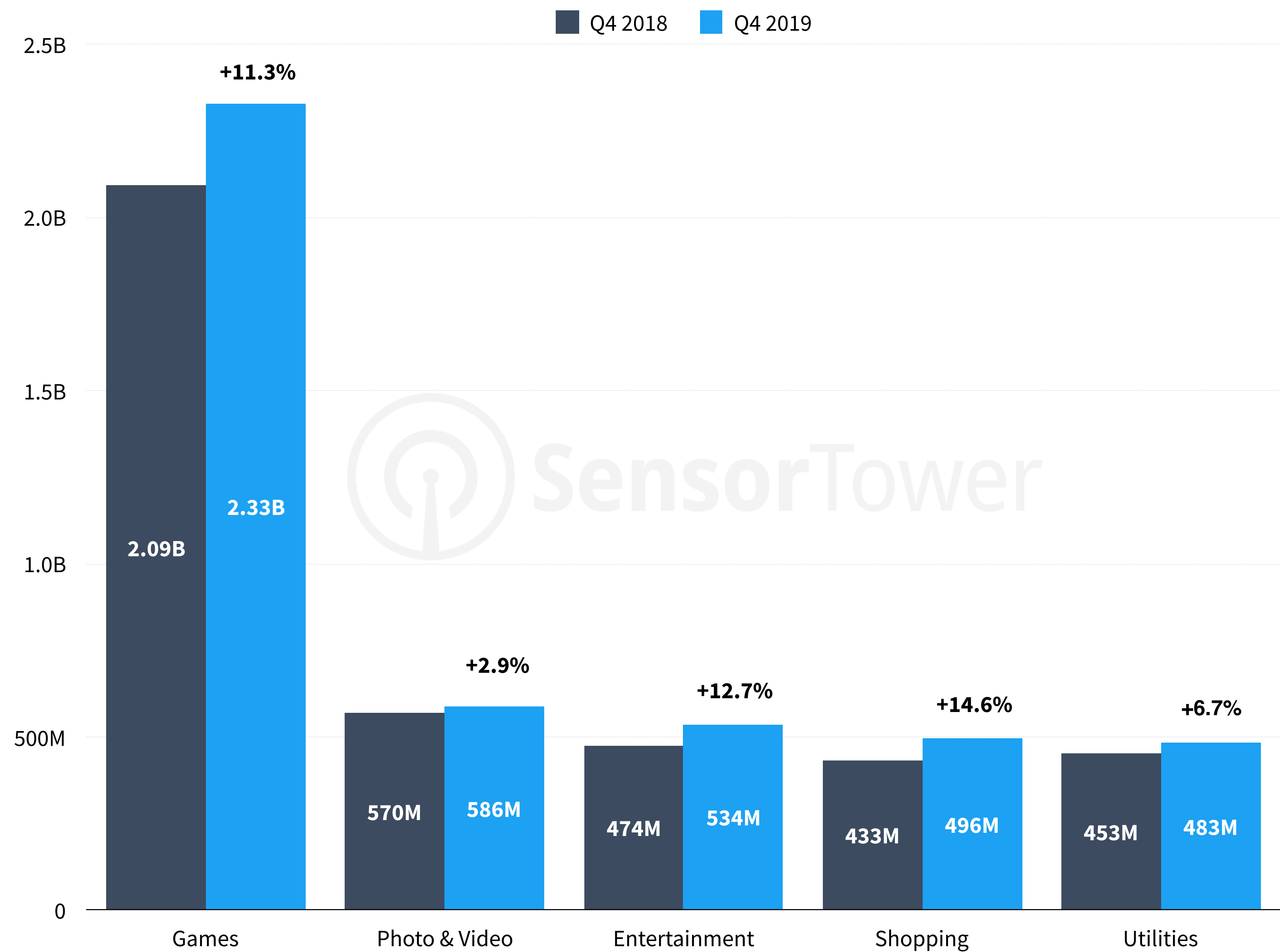
Note Regarding Download Estimates

Our estimates include worldwide daily download totals for Google Play for Oct. 1 through Dec. 31, 2019. We report unique installs only (one download per User). Google preinstalled apps are excluded. Android download estimates do not include third-party stores.



Top Categories

App Store

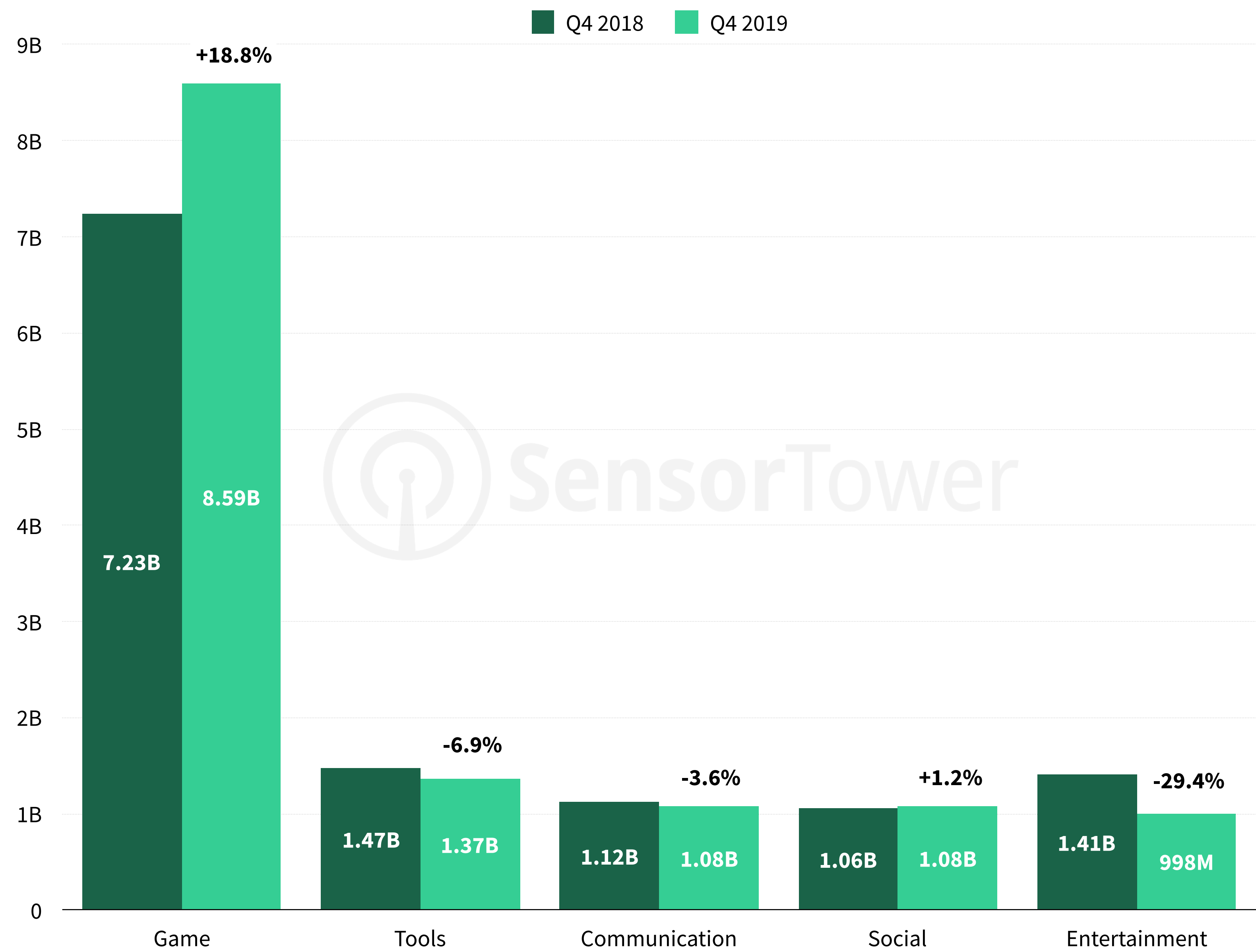


Games had solid growth on the App Store at 11.3% Y/Y. Other categories experienced a combined 6.6% growth.

Shopping passed Utilities to become the No. 4 category with nearly 15% growth Y/Y. Shopping holidays in Q4 such as Black Friday spurred the pop in growth.

Note Regarding Download Estimates
Our estimates include worldwide daily download totals for iPhone and iPad for Oct. 1 through Dec. 31, 2019. Apple apps are excluded. We report unique installs only (one download per User).

Google Play



Three of the top five categories saw installs decline Y/Y, while categories just outside the top five had strong growth. Video Players, Shopping, and Finance downloads each grew by more than 20% Y/Y.

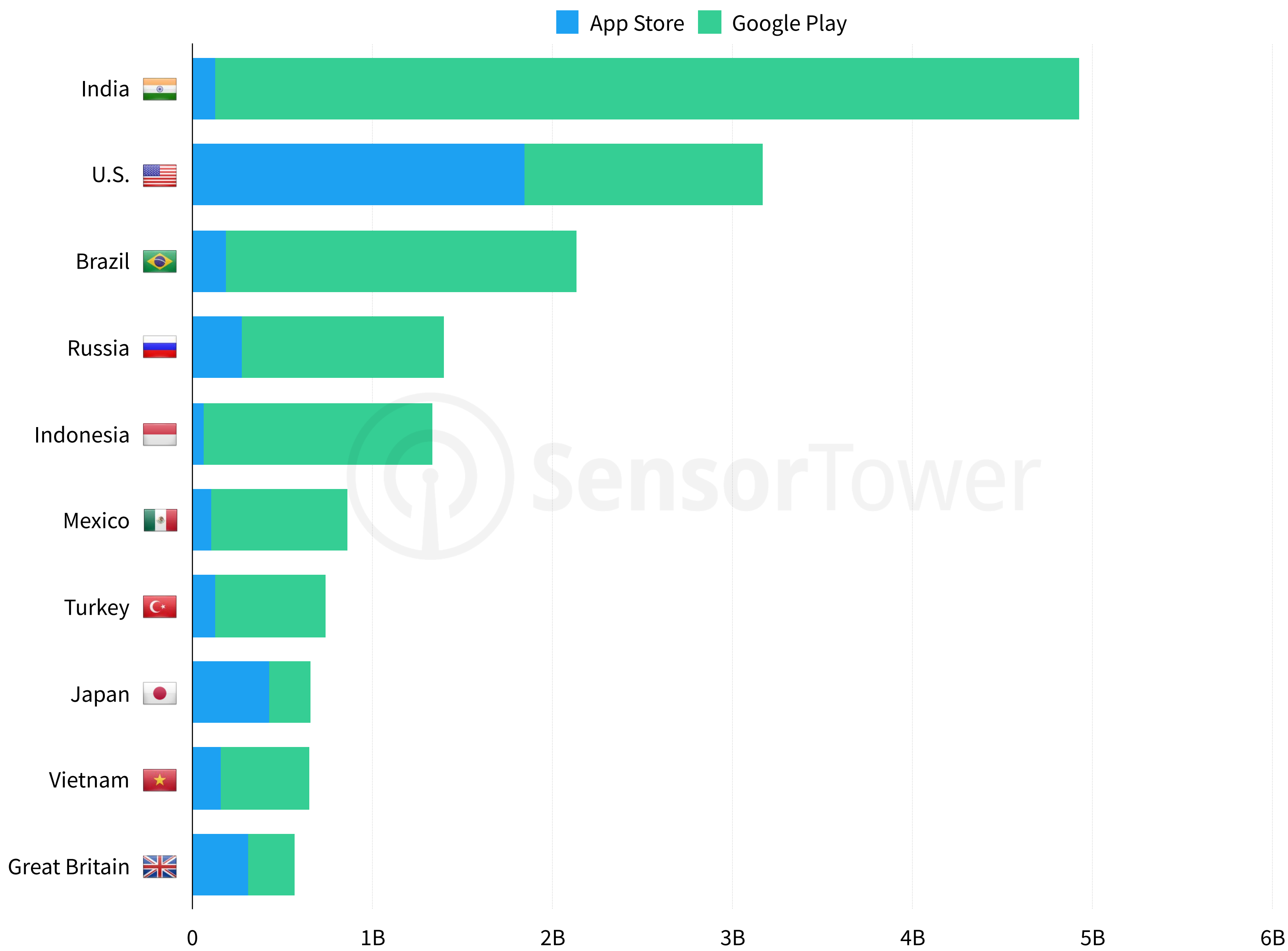
Entertainment downloads decreased 29.4% Y/Y to dip below 1 billion for the first time since Q2 2017. This included a 32% decrease in India, the largest market for Entertainment apps.

Note Regarding Download Estimates
Our estimates include worldwide daily download totals for Google Play for Oct. 1 through Dec. 31, 2019. 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.

A vintage map of North America, showing the United States, Canada, and Mexico. The map is detailed with state and provincial boundaries, major cities, and geographical features like the Gulf of Mexico and the Atlantic Ocean. The text "Top Countries" is overlaid in a large, white, sans-serif font, centered horizontally across the map. The map has a dark, muted color palette, typical of older cartographic prints.

Top Countries

Overall



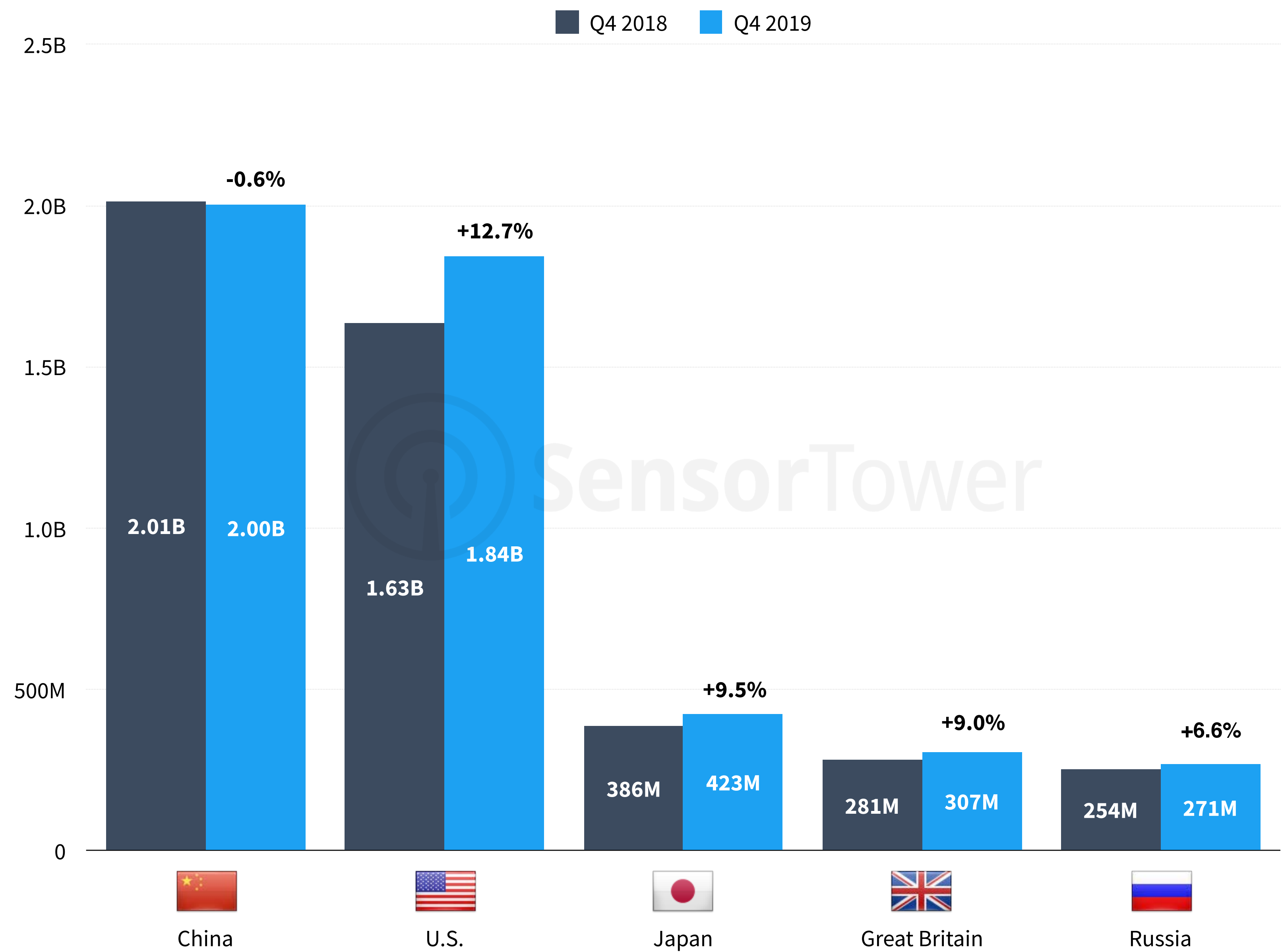
While India’s downloads were flat Y/Y, growth continued in the U.S. (6% Y/Y), Brazil (11%), and Russia (9%). Russia passed Indonesia to regain the No. 4 spot in Q4 2019.

Three of the top 10 countries had more App Store downloads than Google Play: the U.S., Japan, and Great Britain. These countries combined for 6.8% growth Y/Y, compared to 2.8% growth among the other countries in the top 10.

Note Regarding Download Estimates
Our estimates include worldwide daily download totals for iPhone and iPad for Oct. 1 through Dec. 31, 2019. Apple apps are excluded. We report unique installs only (one download per User).

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

App Store



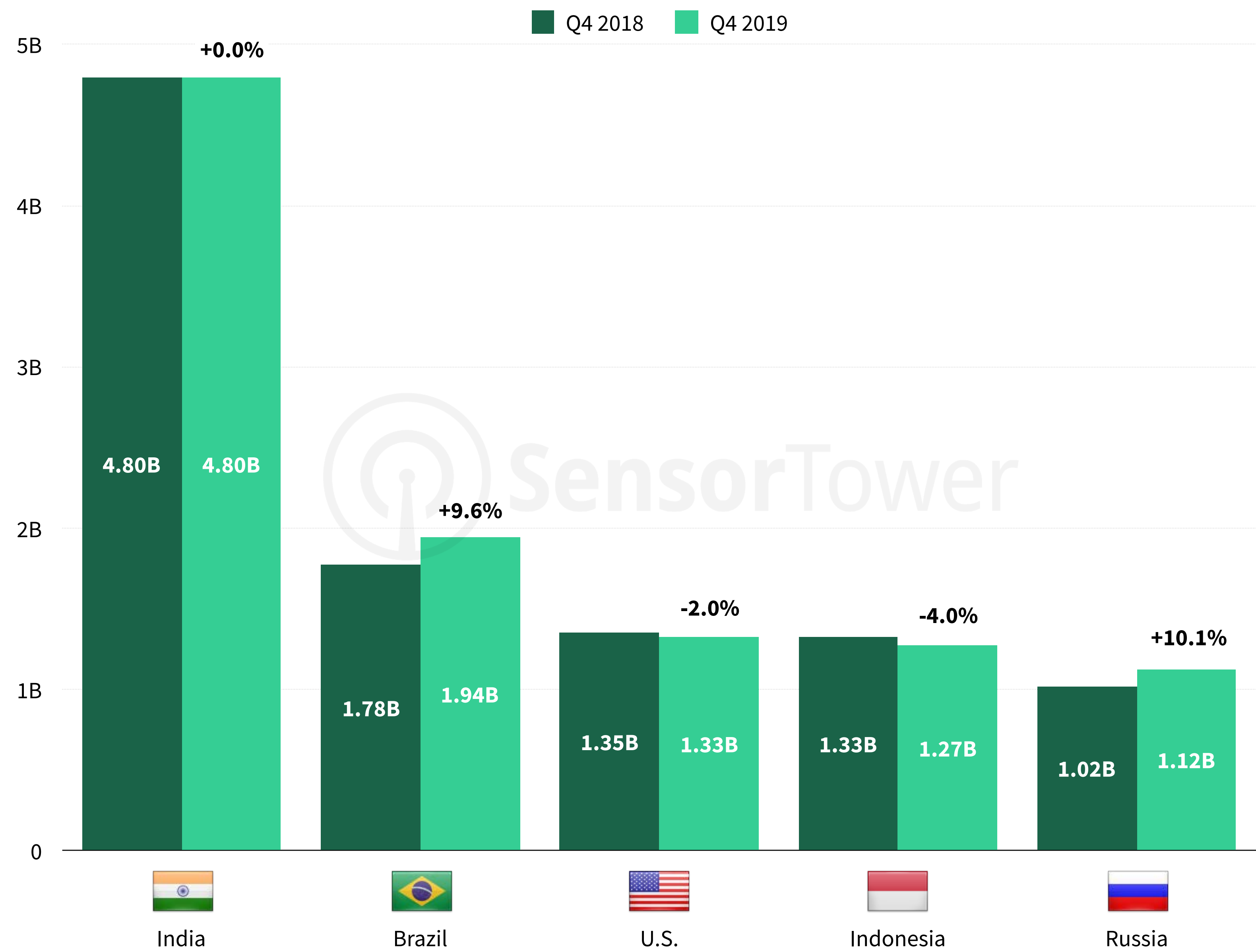
The gap between China and the U.S. was at 160 million, the narrowest it’s been in any quarter since 2014. The U.S. saw strong growth of 12.7% Y/Y, while China installs decreased slightly.

Japan, Great Britain, and Russia rounded out the top five again in Q4 2019. No other country had more than 200 million downloads in the quarter.

Note Regarding Download Estimates
Our estimates include worldwide daily download totals for iPhone and iPad for Oct. 1 through Dec. 31, 2019. Apple apps are excluded. We report unique installs only (one download per User).

Q4 Countries by Downloads

Google Play



India’s 4.8 billion Google Play downloads in Q4 matched the year prior. India downloads peaked at 5.25 billion in 2Q19.

Google Play downloads had a 35% CAGR in Indonesia between 2Q14 and 2Q19. However, Indonesia’s installs have decreased over the last two quarters.

Note Regarding Download Estimates
Our estimates include worldwide daily download totals for Google Play for Oct. 1 through Dec. 31, 2019. 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.

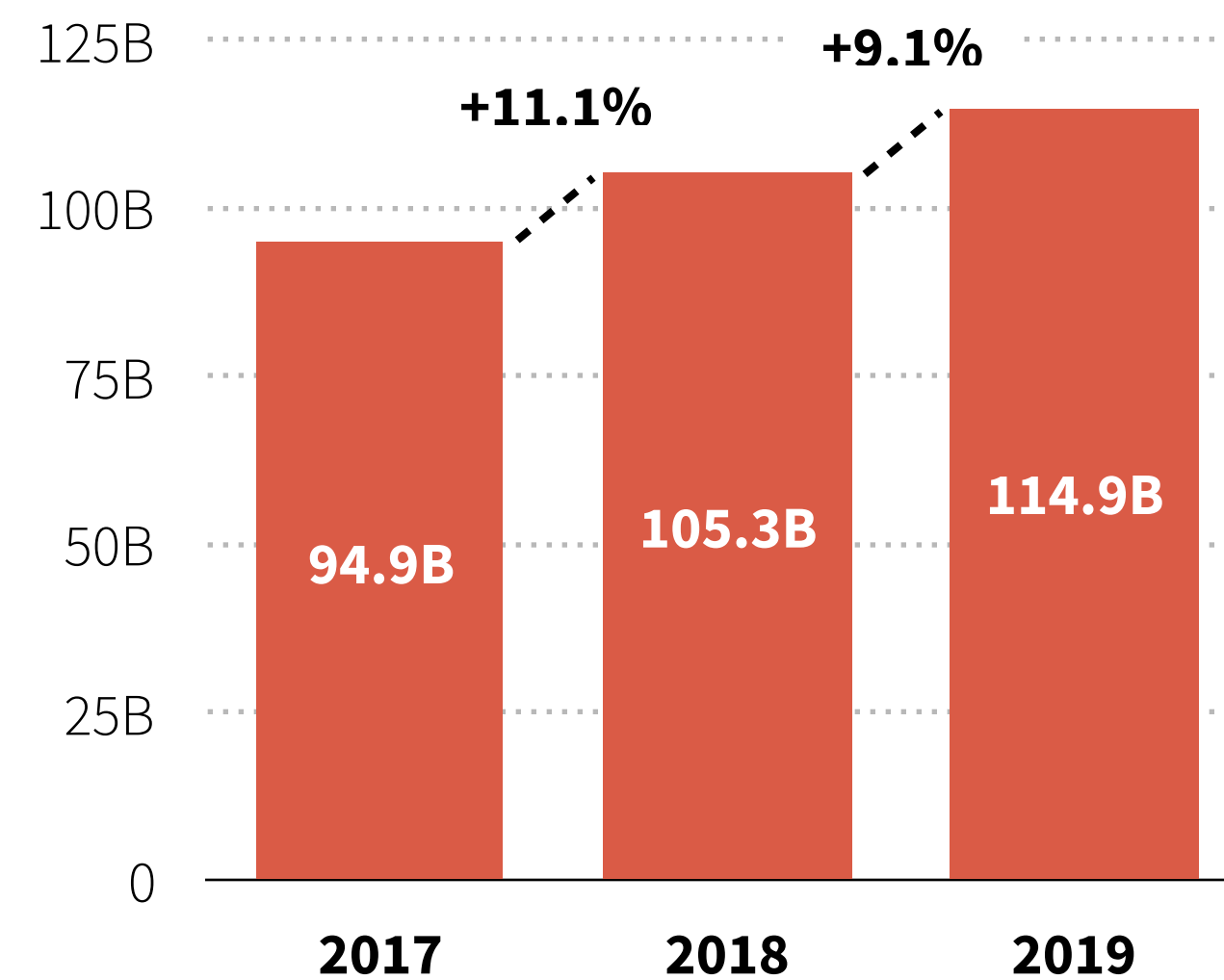


2019 Year in Review

Market Overview:

2019 Worldwide Download Growth

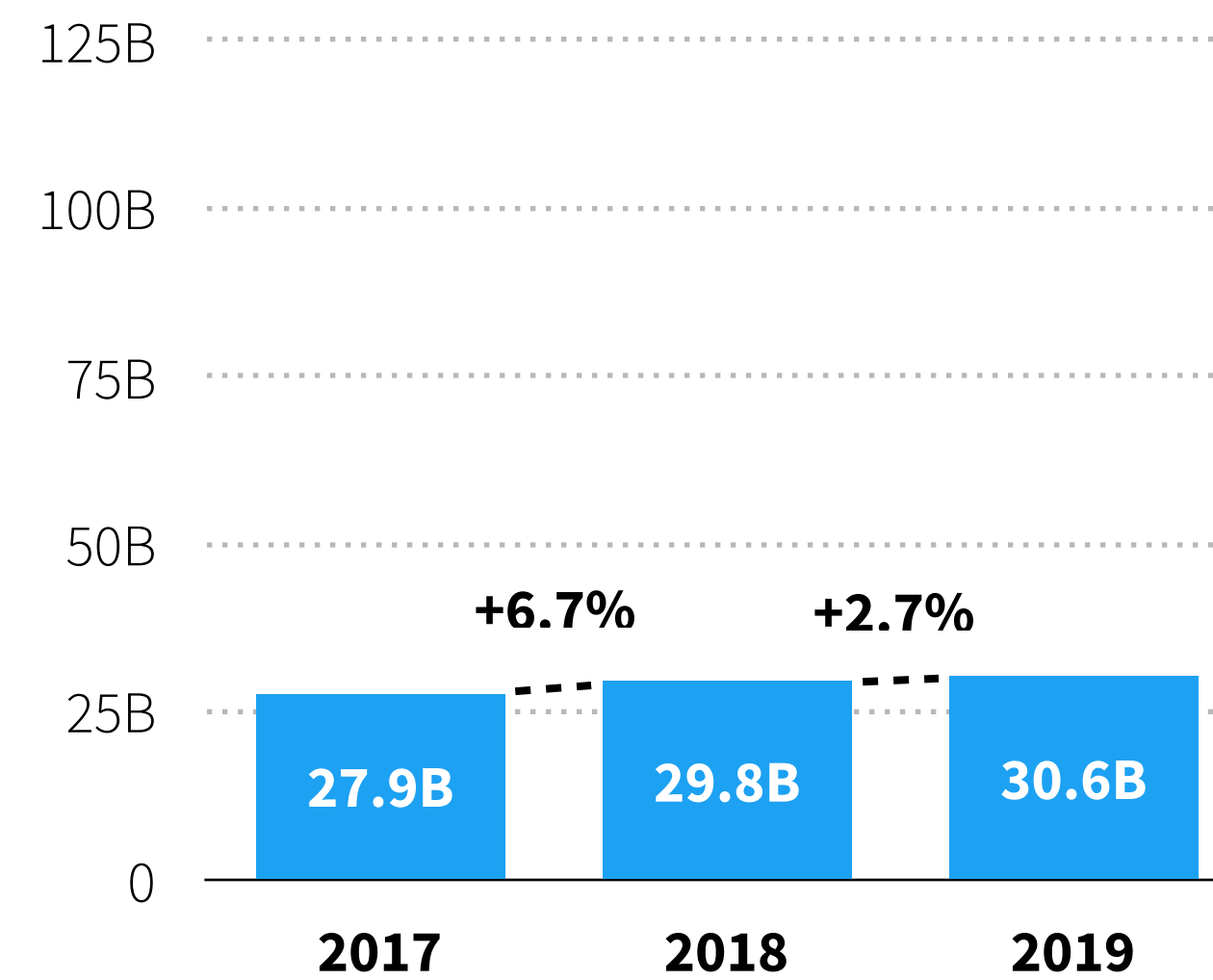
Worldwide App Store and Google Play Downloads



114.9 Billion

App Store + Google Play Downloads

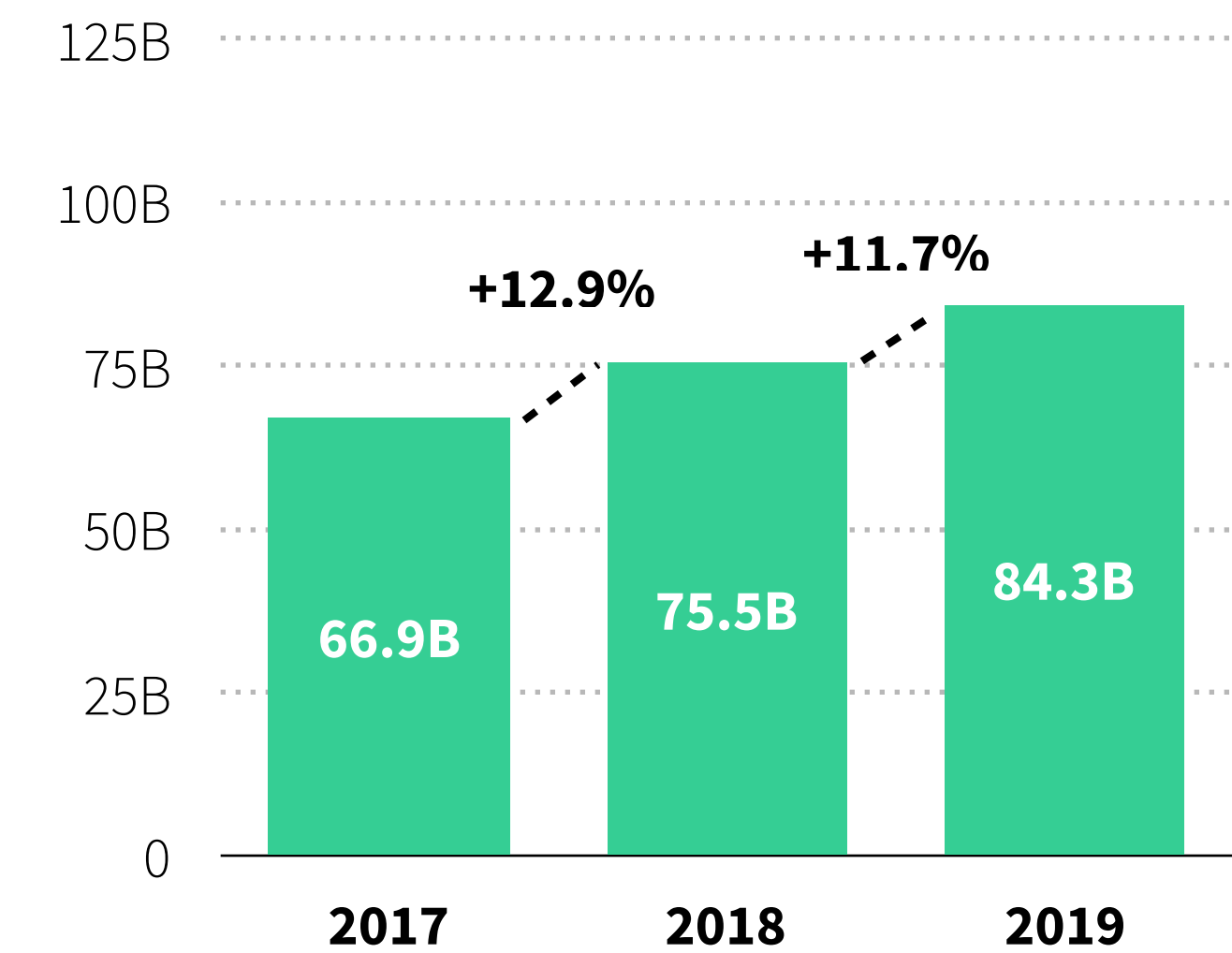
Worldwide App Store Downloads



30.6 Billion

App Store Downloads

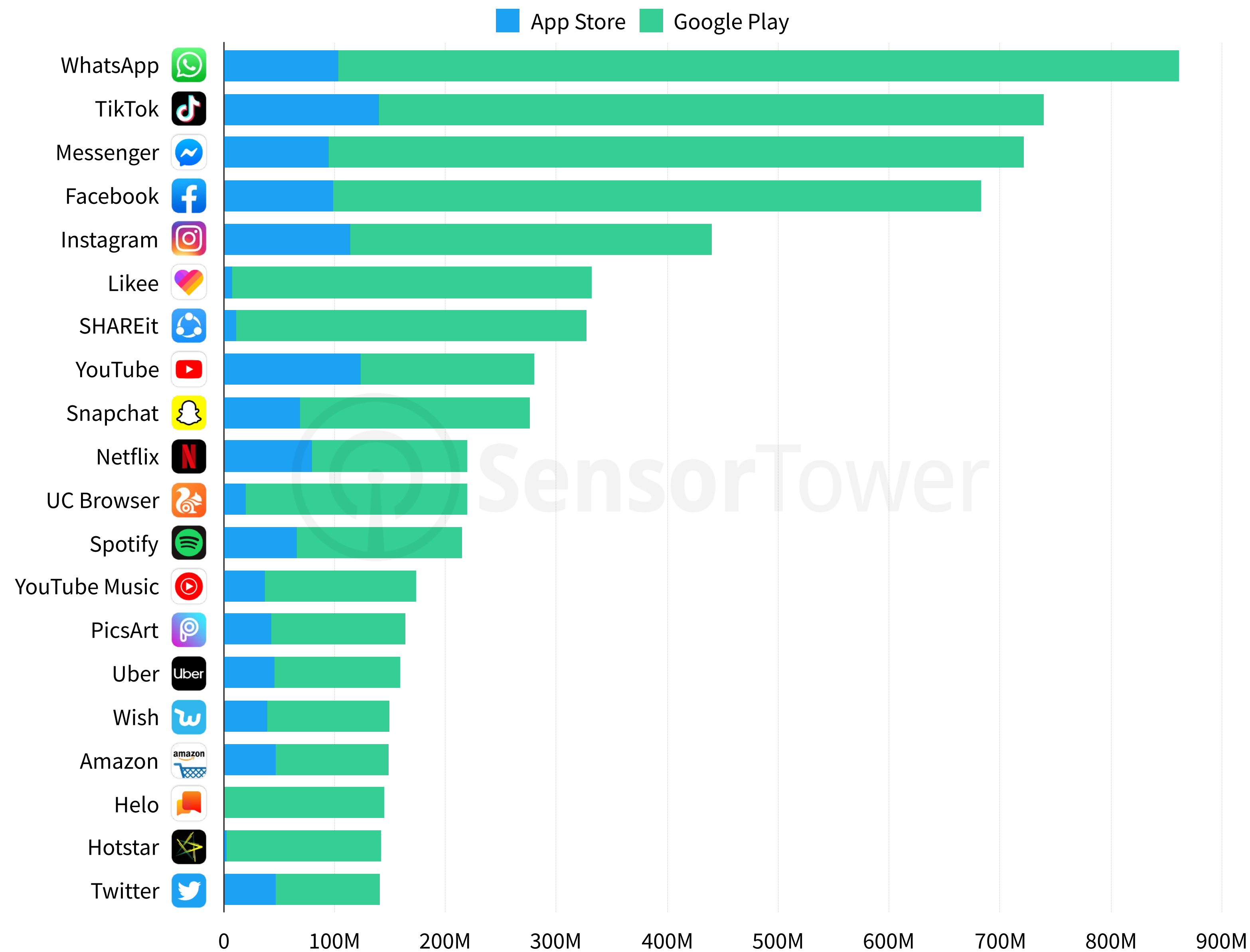
Worldwide Google Play Downloads



84.3 Billion

Google Play Downloads

Top Apps



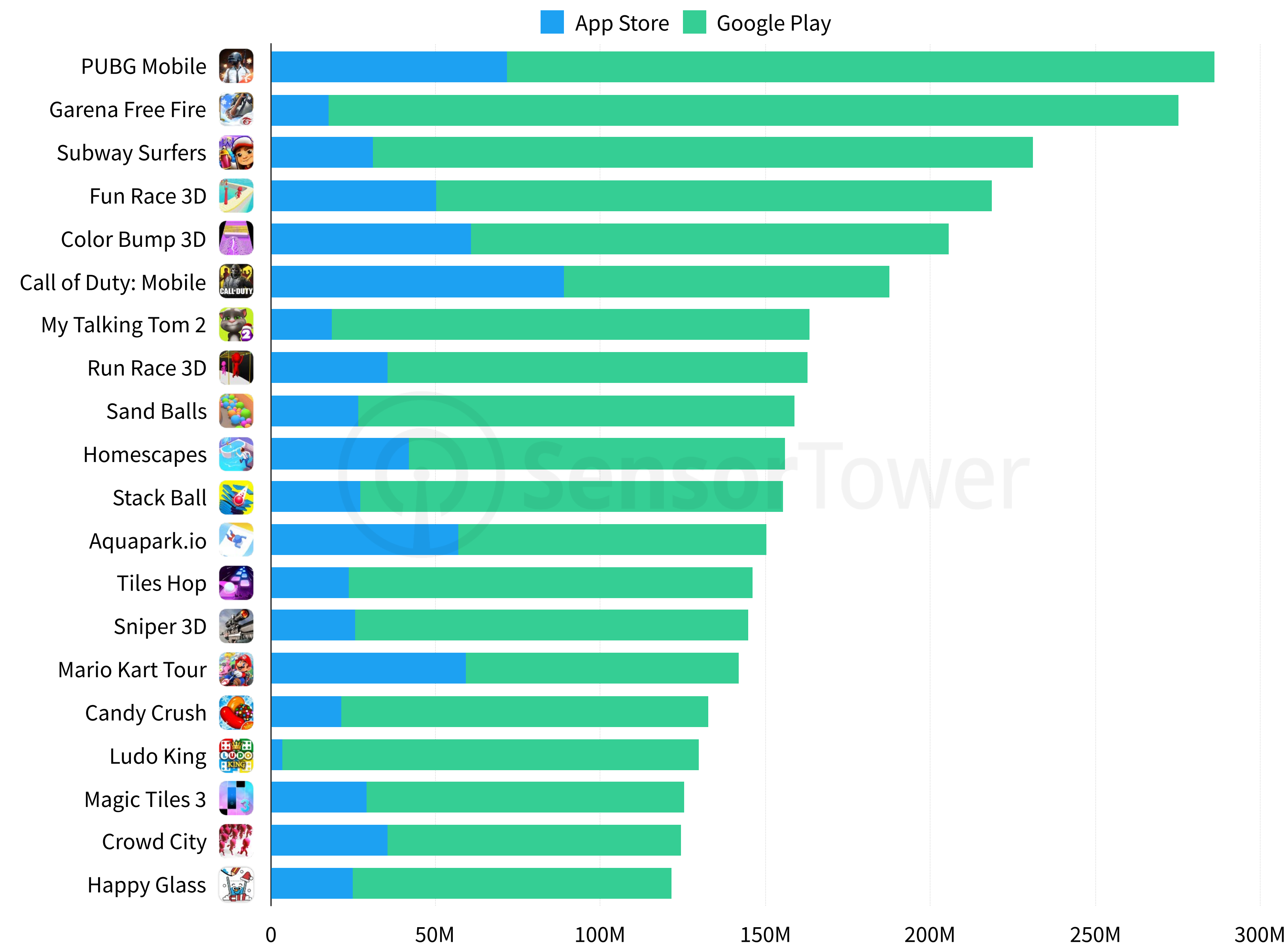
After Facebook had the top four apps in 2016 and 2017, TikTok took the No. 4 spot ahead of Instagram in 2018. TikTok did not slow down in 2019, passing Messenger and Facebook to rank No. 2 overall.

Likee (formerly Like Video) from Bigo Technology ranked No. 6 with more than 330 million downloads in 2019. This was 173% growth Y/Y, with India driving more than half of installs.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1 through Dec. 31, 2019. 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.

Top Games

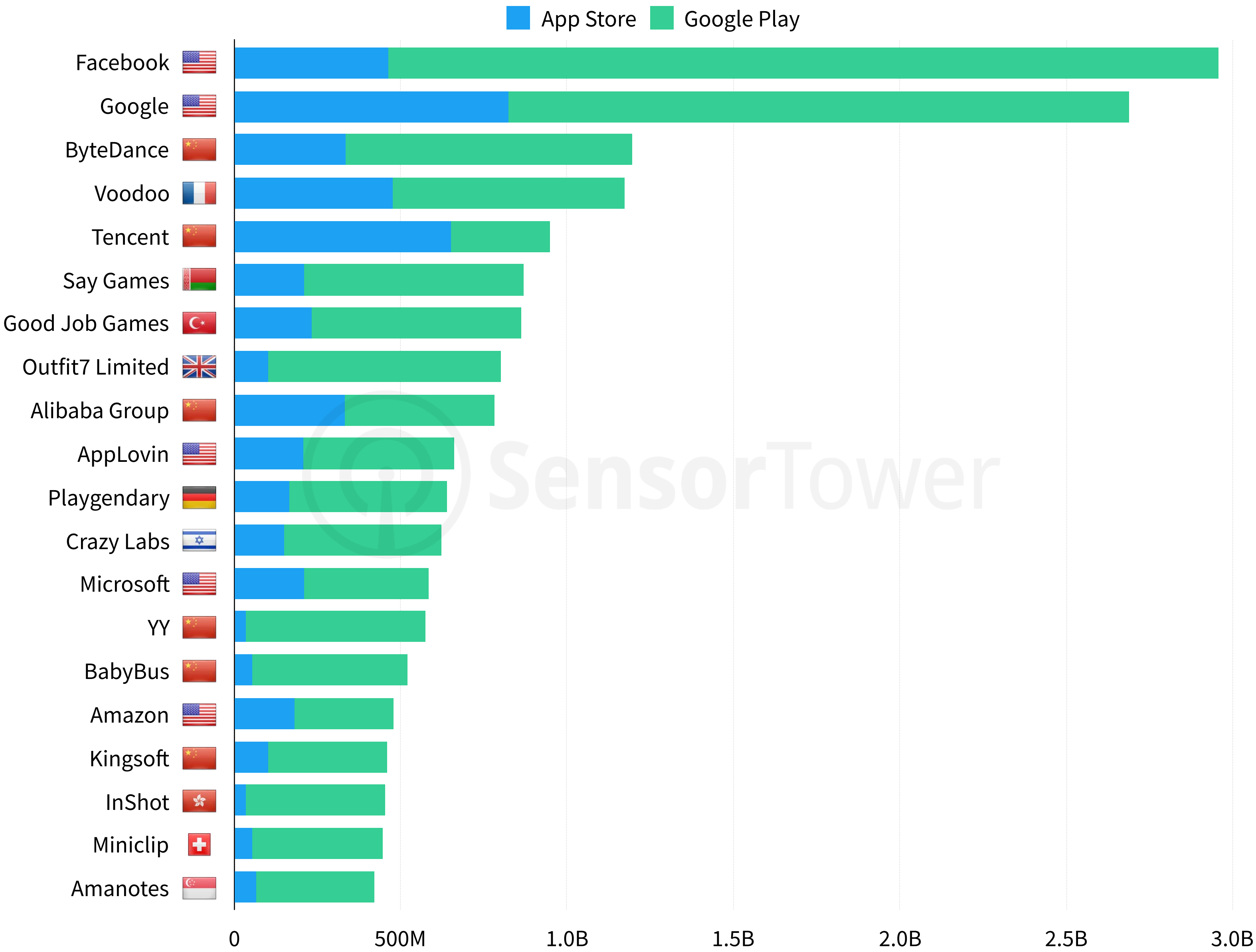


PUBG Mobile (also known as Game for Peace in China) was the top mobile game in 2019 by downloads, after ranking second in 2018. It had approximately 285 million installs last year.

Another battle royale game, Garena Free Fire, came in as the No. 2 game in 2019. It saw 48% growth Y/Y to move up from the No. 4 spot in 2018.

Note Regarding Download Estimates
Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1 through Dec. 31, 2019. 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.

Top Publishers

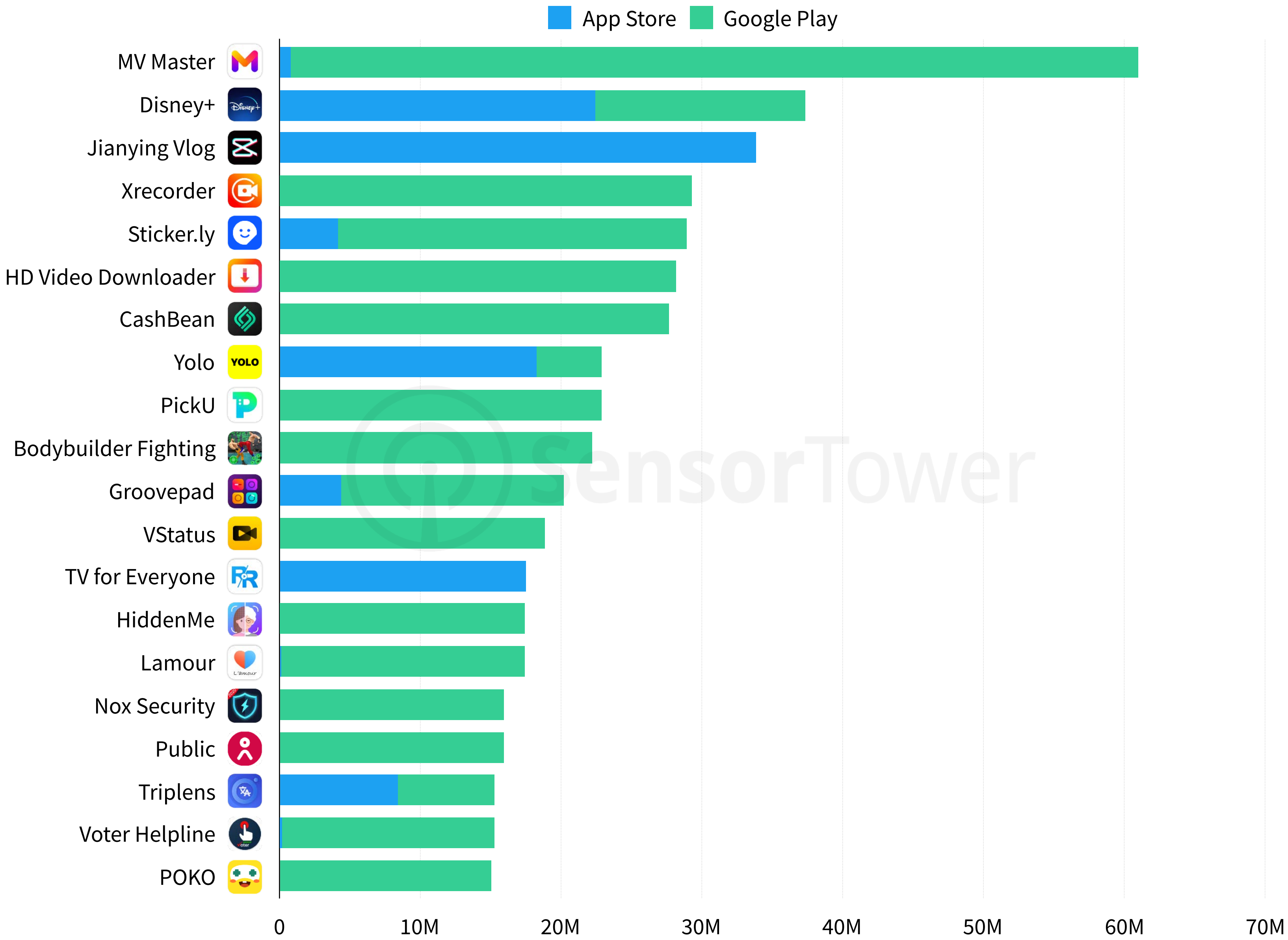


Propelled by having four of the top five apps, Facebook was once again the top publisher overall in 2019. Google was No. 2 with nearly 2.3 billion downloads and 19% Y/Y growth.

ByteDance passed Voodoo to round out the top three. TikTok was its top app with more than 700 million downloads.

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

Top New Apps

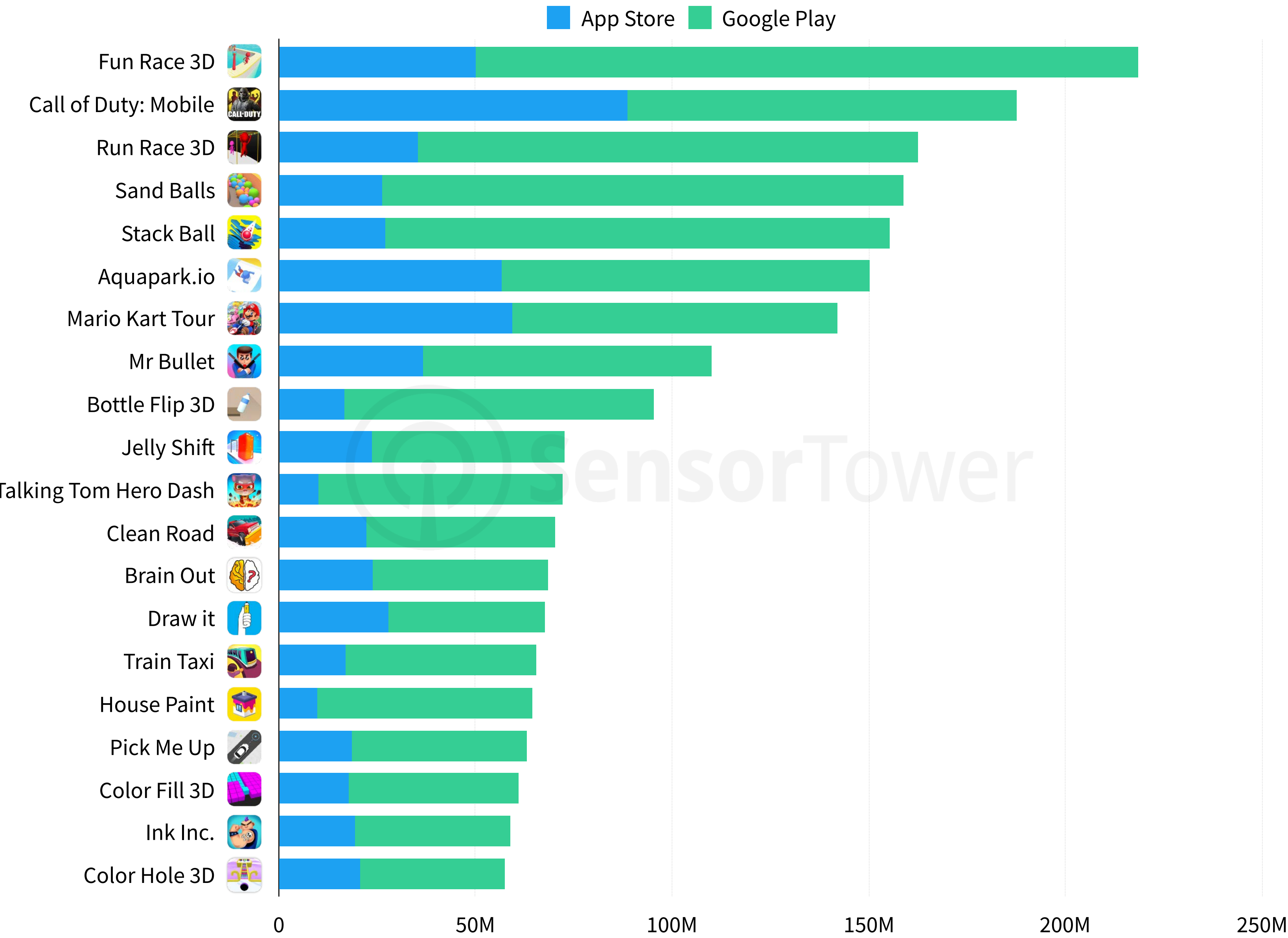


MV Master, a photo editing app popular in India, was the top app launched in 2019 with more than 60 million installs. India drove more than 50 million of these.

Disney+ was the No. 2 new app globally, despite limited country availability. This was especially impressive since Disney+ launched 11 months into the year.

Note Regarding Download Estimates
Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1 through Dec. 31, 2019. 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.

Top New Games



Hyper-casual games flooded the top games list in 2019, making up eight of the top 10 new games in 2019. Fun Race 3D from Good Job Games was the top new game in 2019.

Call of Duty: Mobile and Mario Kart Tour still succeeded despite hyper-casual trends. Call of Duty: Mobile had more than 180 million downloads after being launched on September 30.

Note Regarding Download Estimates
Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1 through Dec. 31, 2019. 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.

A low-angle, upward-looking perspective of several tall, modern skyscrapers with glass facades. The buildings are dark and their windows reflect the sky. The perspective creates a sense of height and scale. The text "Stories of the Year" is centered over the image in a white, sans-serif font.

Stories of the Year

Stories of the Year:

1. Disney+

Disney+ launched in the U.S. on November 12 and immediately shook up the subscription video on-demand (SVOD) landscape.

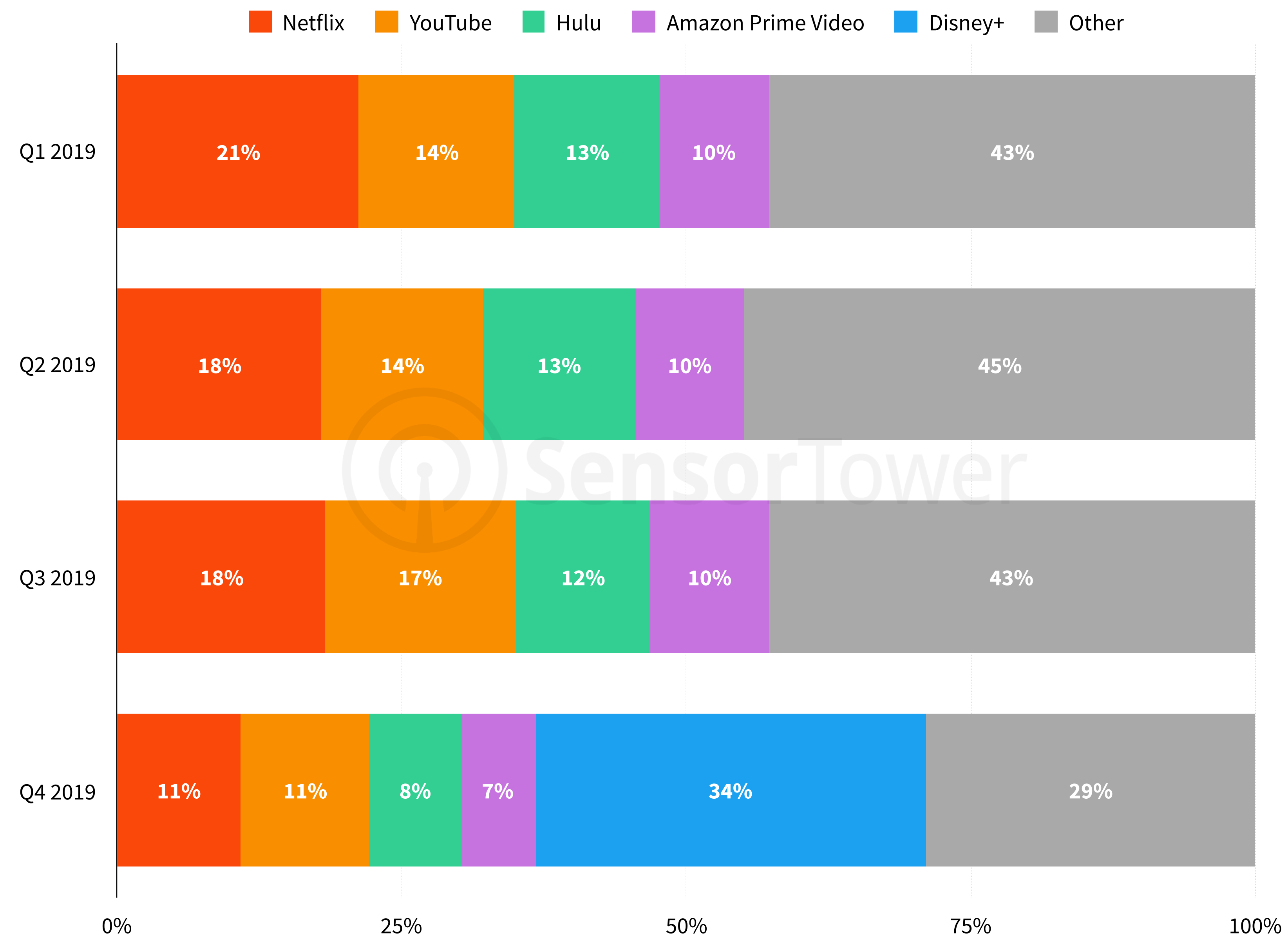
- **Disney+ saw more than 30 million downloads in the U.S. during Q4 2019**, contributing to the expansion of the SVOD market.
- **Disney+ grossed more than \$50 million in its first 30 days**, well ahead of SVOD competitors such as HBO NOW and Showtime.
- **In December, Disney+ earned more revenue in the U.S. than HBO NOW's best month.** This includes the revenue spikes HBO NOW saw alongside the release of the final season of Game of Thrones.



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

Download Market Share

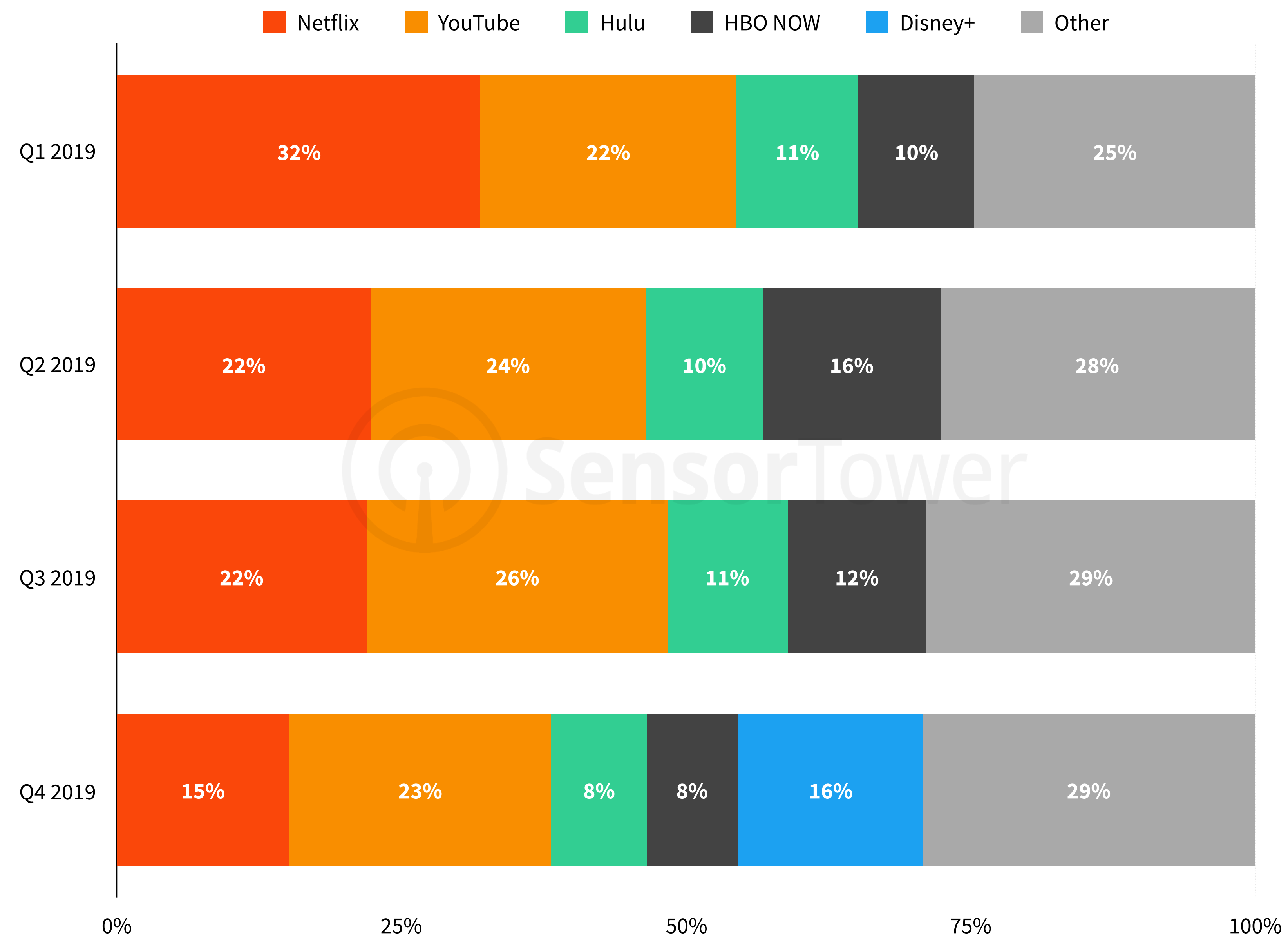


Disney+’s launch had an immediate impact on the U.S. SVOD market, grabbing 34% of downloads in Q4 2019. It surpassed 30 million U.S. installs in 2019 after launching in November, more than Hulu and Amazon Prime Video had in all of 2019.

Downloads for SVOD apps excluding Disney+ still grew 12.5% Q/Q and 4.7% Y/Y in 4Q19. This suggests that Disney+ has expanded the video streaming market.

Note Regarding Download Estimates
Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1 through Dec. 31, 2019. 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.

Revenue Market Share

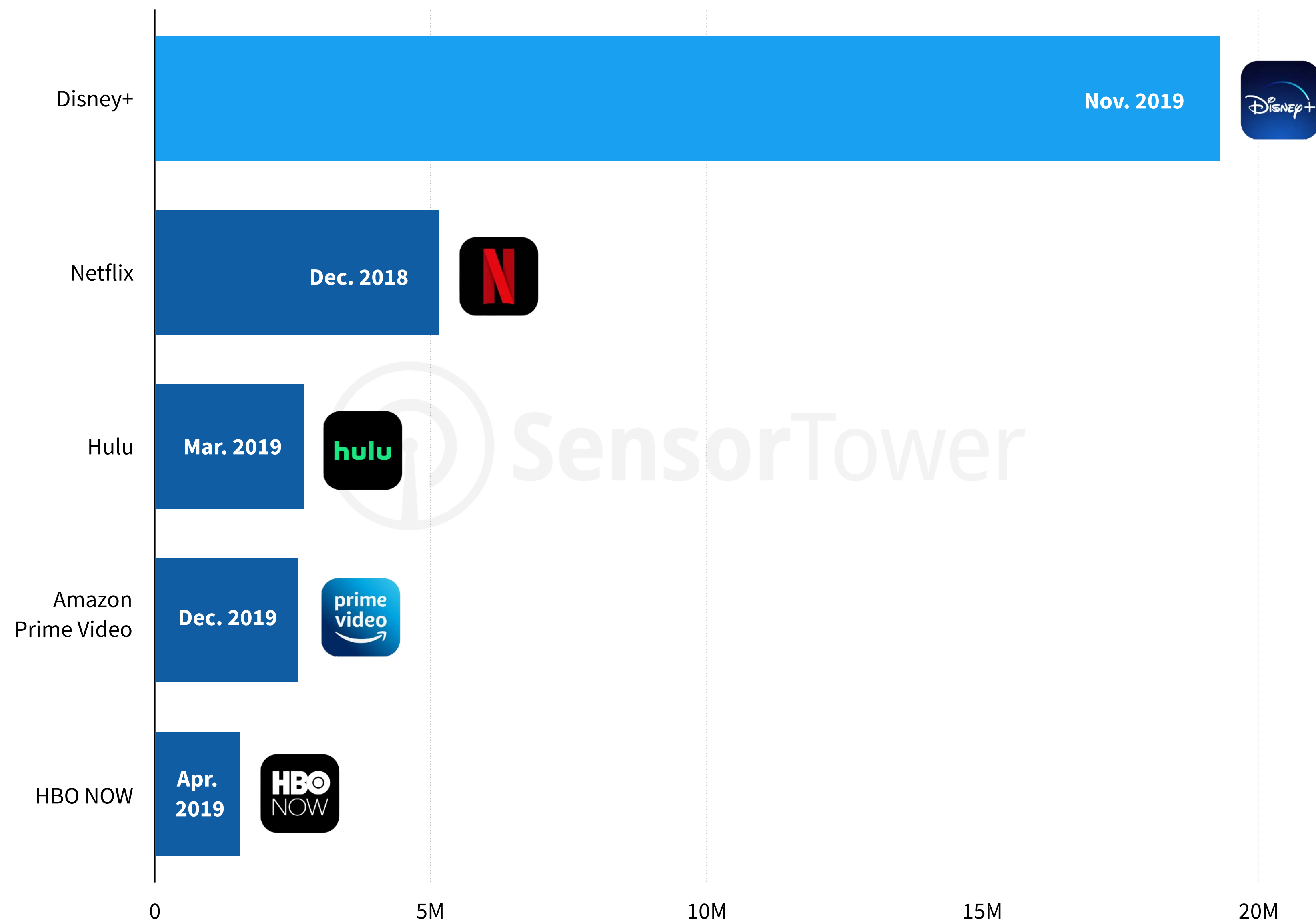


Disney+ generated 16% of U.S. SVOD revenue in Q4 2019. This was especially impressive since it launched on November 12 and had a seven-day free trial.

Netflix’s decrease in market share reflects its decision to remove the ability to subscribe through the app, pushing new users to subscribe online instead. Its mobile revenue declined throughout 2019 as a result.

Note Regarding Revenue Estimates
Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1 through Dec. 31, 2019. Apple apps and Google pre-installed apps are excluded. We report gross revenue (including the cut for Apple or Google). Android estimates do not include third-party stores. Figures represent aggregate installs of all app versions, ex: Facebook and Facebook Lite.

Peak Download Month

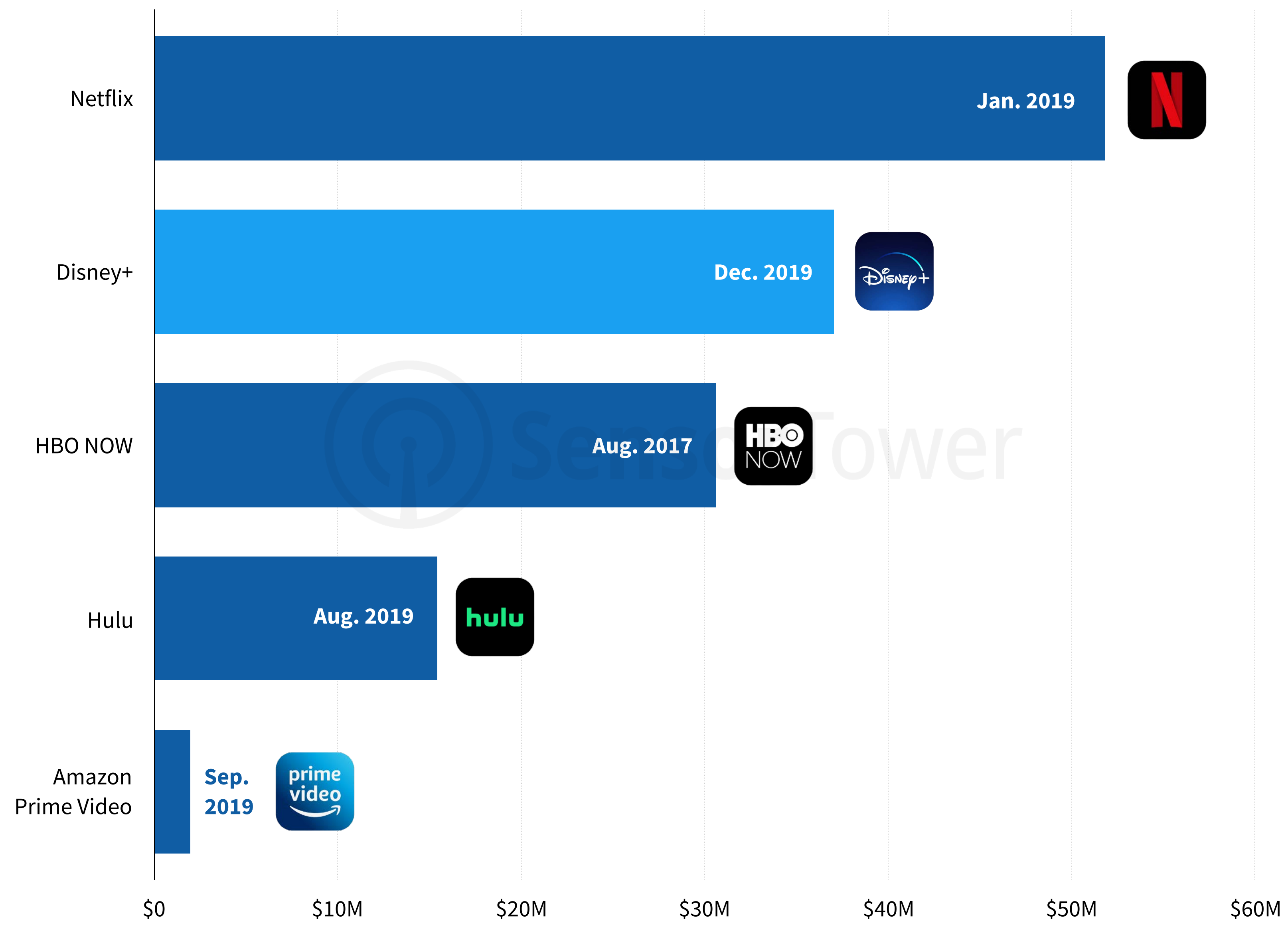


Since 2014, no SVOD app has seen nearly as many U.S. downloads as Disney+ in **November**. Part of this reflects a very different mobile landscape since the launch of apps such as Netflix, Hulu, and HBO NOW.

Disney+ had more than 12 times as many U.S. downloads in November as HBO NOW had for the launch of the final season of Game of Thrones in April 2019.

Note Regarding Download Estimates
Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Dec. 1, 2018 through Dec. 31, 2019. 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.

Peak Revenue Month



Disney+ was able to reach 71% of Netflix’s revenue peak this December. Netflix revenue would have likely increased throughout 2019 if it hadn’t removed the ability to subscribe through the app, but this was still a very impressive achievement for an app in just its second month.

Disney+ earned more U.S. revenue in December than HBO NOW had in Aug. 2017 with the release of GOT season 7.

Note Regarding Revenue Estimates
Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Aug. 1, 2017 through Dec. 31, 2019. Apple apps and Google pre-installed apps are excluded. We report gross revenue (including the cut for Apple or Google). Android estimates do not include third-party stores. Figures represent aggregate installs of all app versions, ex: Facebook and Facebook Lite.

Stories of the Year:

2. TikTok

When it comes to worldwide downloads, **Facebook**'s dominance among the top apps was apparent: **Facebook** published the top four apps in 2016 and 2017. Over the next two years, only **TikTok** was able to break into these top positions, demonstrating that it is still possible for new apps to emerge and compete with top social apps by publishers such as **Facebook** and **Snap**.

- **TikTok ranked second only to Facebook's WhatsApp in 2019 by worldwide downloads.** It moved past Messenger and Facebook to climb two spots compared to 2018.
- **TikTok revenue grew 540% Y/Y in Q4 2019, with the vast majority of that growth from China.** It was the No. 7 non-game app by revenue in Q4.



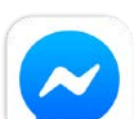




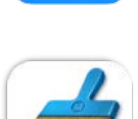




Could your business benefit from access to Store Intelligence insights and the highly accurate data used to build this report? See the fastest growing apps and publishers by downloads or revenue.


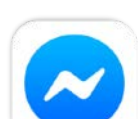








[REQUEST DEMO](#)

Yearly Top Apps


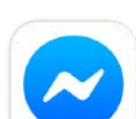

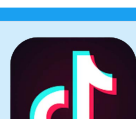
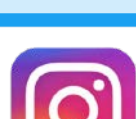


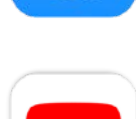
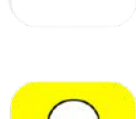
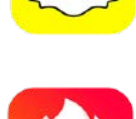
2016

1		WhatsApp Facebook
2		Facebook Facebook
3		Messenger Facebook
4		Instagram Facebook
5		Snapchat Snap
6		UCBrowser Alibaba
7		SHAREit SHAREit
8		Clean Master Cheetah Mobile
9		imo imo
10		Uber Uber


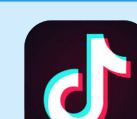


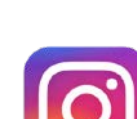


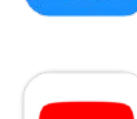


2017

1		WhatsApp Facebook	-
2		Messenger Facebook	+1
3		Facebook Facebook	-1
4		Instagram Facebook	-
5		SHAREit SHAREit	+2
6		Snapchat Snap	-1
7		UCBrowser Alibaba	-1
8		YouTube Google	NEW
9		Uber Uber	+1
10		Spotify Spotify	NEW

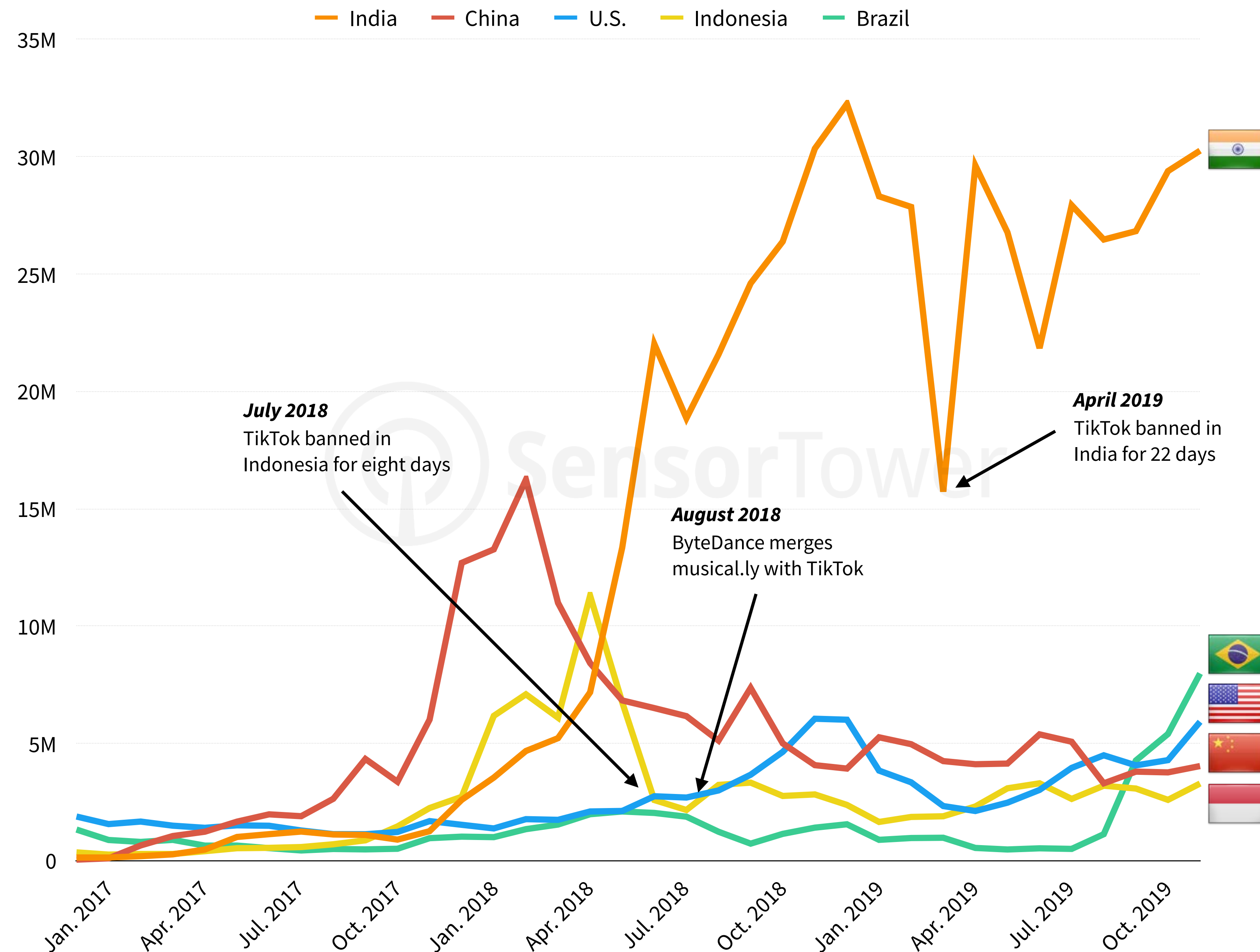
2018

1		WhatsApp Facebook	-
2		Messenger Facebook	-
3		Facebook Facebook	-
4		TikTok ByteDance	NEW
5		Instagram Facebook	-1
6		UCBrowser Alibaba	+1
7		SHAREit SHAREit	-2
8		YouTube Google	-
9		Snapchat Snap	-3
10		Vigo Video ByteDance	NEW

2019

1		WhatsApp Facebook	-
2		TikTok ByteDance	+2
3		Messenger Facebook	-1
4		Facebook Facebook	-1
5		Instagram Facebook	-
6		Likee BIGO	NEW
7		SHAREit SHAREit	-
8		YouTube Google	-
9		Snapchat Snap	-
10		Netflix Netflix	NEW

Top Countries by Downloads



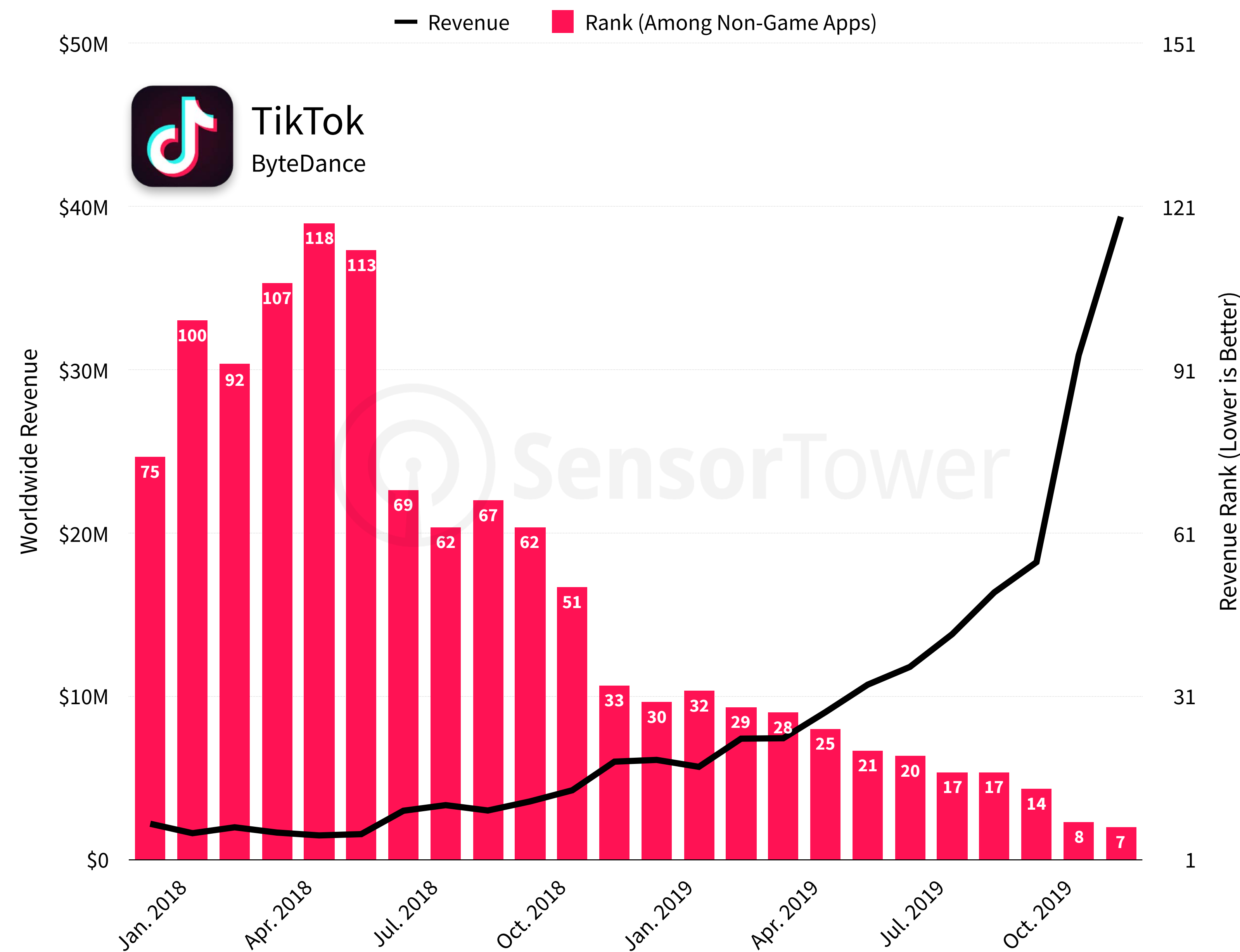
Despite a brief ban by the Indian government in April 2019, the country remained TikTok's top market for downloads throughout 2019. Brazil was its second largest market in 4Q19 with approximately 700% growth Q/Q.

While downloads in China fell off after March 2018, it was still responsible for 78% of TikTok's revenue in Q4 2019. The U.S. was second at 16%.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1, 2017 through Dec. 31, 2019. 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.

TikTok Revenue



TikTok Worldwide Monthly Revenue

TikTok revenue took off in 2019 to approach \$40 million in December 2019. It was the No. 7 app (excluding games) by revenue that month, ahead of apps like Disney+, Youku, and Hulu.

China was responsible for the majority of this growth. China and the U.S. had similar revenue totals in 4Q18, but China’s revenue grew 12X Y/Y by 4Q19 compared to solid 155% growth in the U.S.

Note Regarding Revenue Estimates
Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1, 2018 through Dec. 31, 2019. Apple apps and Google pre-installed apps are excluded. We report gross revenue (including the cut for Apple or Google). Android estimates do not include third-party stores. Figures represent aggregate installs of all app versions, ex: Facebook and Facebook Lite.

Stories of the Year:

3. Console Games Storm Mobile

The end of 2019 was marked by two popular console game franchises successfully transitioning to mobile: **Call of Duty: Mobile** from **Activision Blizzard** and **Mario Kart Tour** from **Nintendo**. While **Mario Kart Tour** quickly became **Nintendo**'s most successful mobile launch to date, **Call of Duty: Mobile** had one of the largest mobile game launches in years.

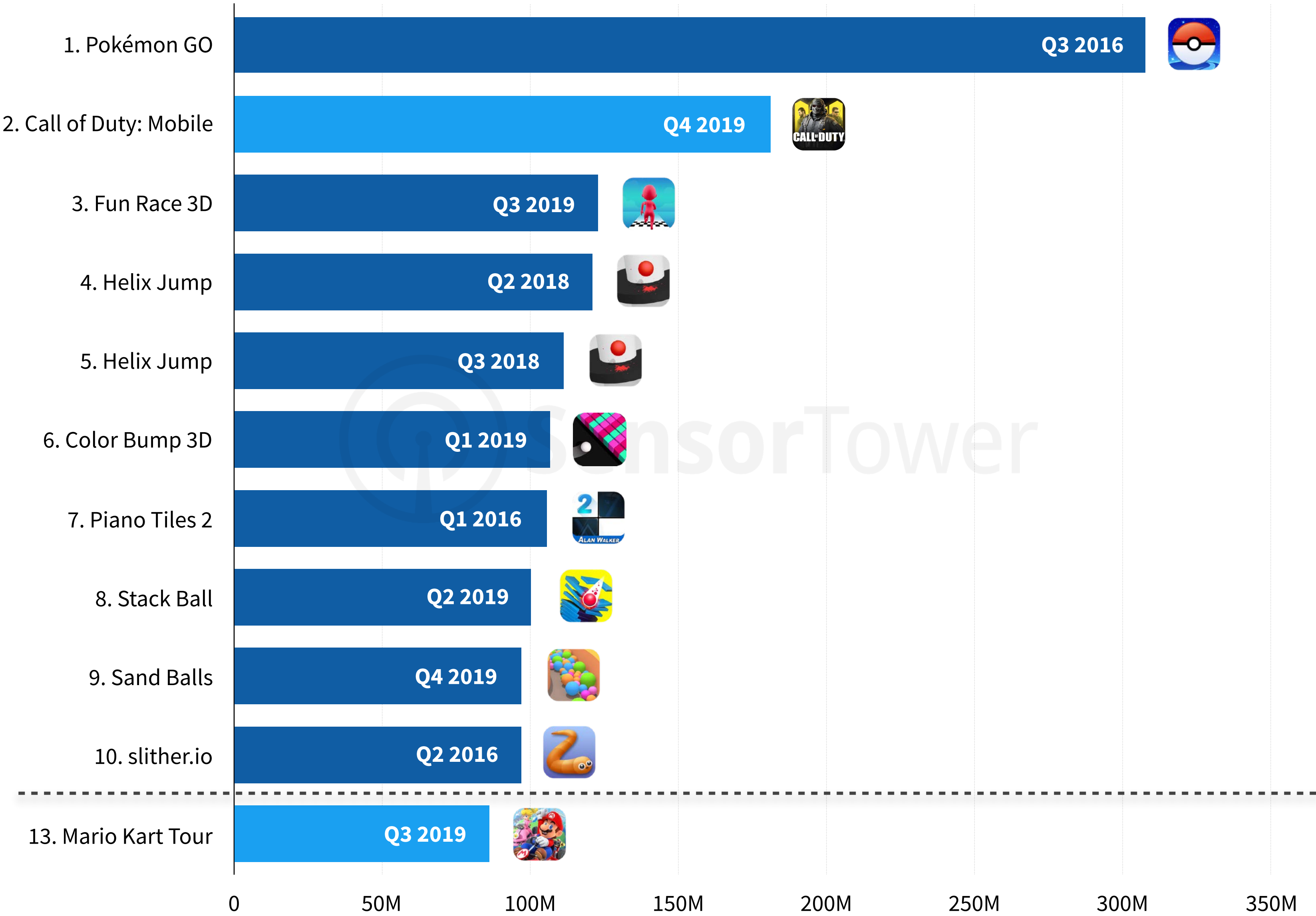
- **Call of Duty: Mobile** had the second best quarter of any mobile game ever for **worldwide downloads in Q4 2019**. Only **Pokémon GO** had a better quarter in Q3 2016.
- **Call of Duty: Mobile** and **Mario Kart Tour** monetized swiftly, becoming the top games launched in 2019 by **U.S. revenue in their first 90 days**. The established success of these games on consoles translated to quick monetization on mobile.



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](#)

Top All-Time Game Quarters

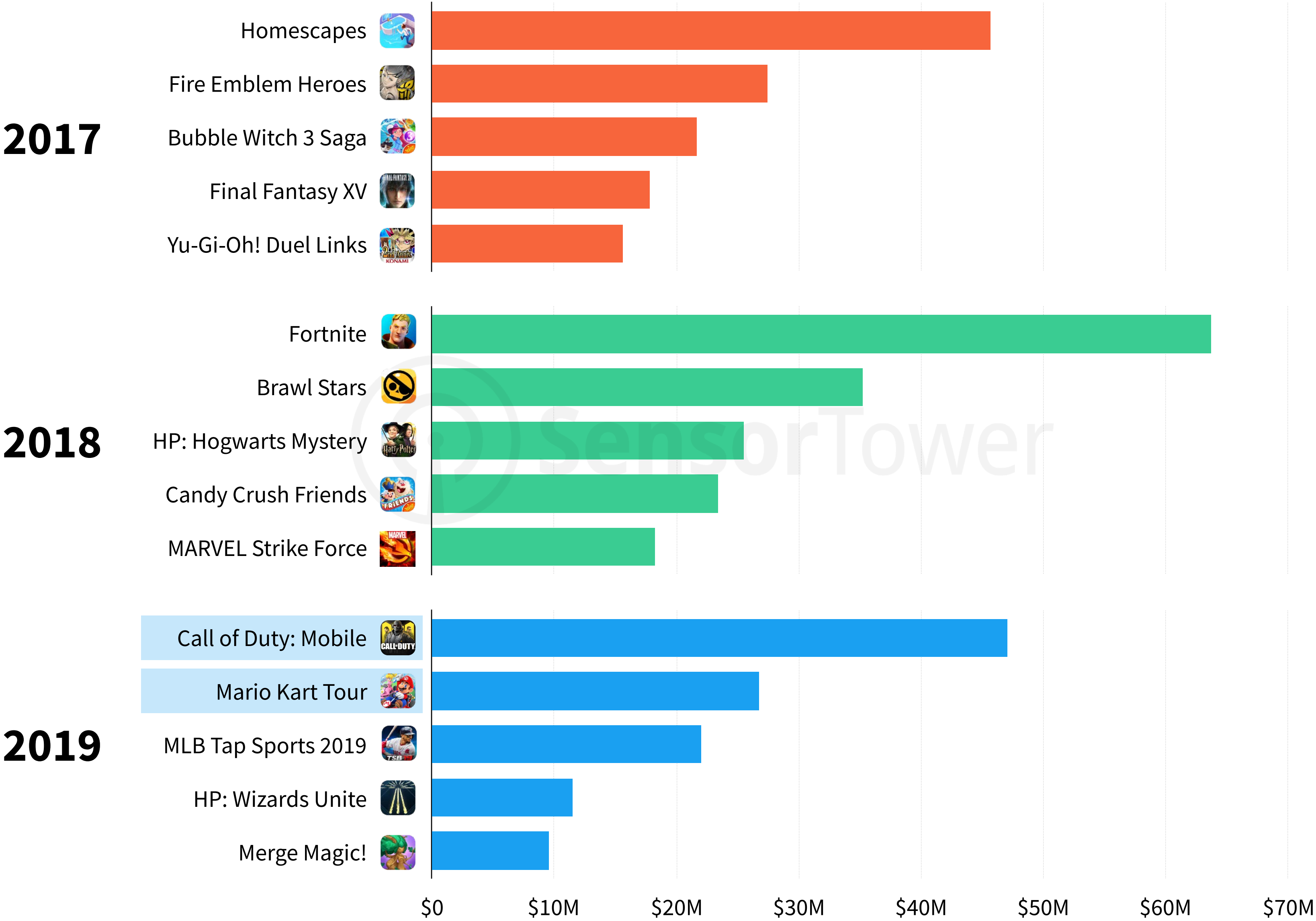


Call of Duty: Mobile had the second-best quarter for any mobile game by worldwide downloads in Q4 2019 with more than 180 million downloads. Only Pokémon GO had a better quarter, with more than 300 million installs when it launched in Q3 2016.

Mario Kart Tour came in at No. 13 with more than 80 million downloads 3Q19. As it launched at the end of September, it reached that total in just six days.

Note Regarding Download Estimates
Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Apr. 1, 2016 through Dec. 31, 2019. 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.

First 90 Day Revenue - U.S.



Call of Duty: Mobile and Mario Kart Tour were the top mobile games launched in 2019 by U.S. revenue in the first 90 days. They ranked No. 2 and 6, respectively, among games launched since 2017.

Since 2017, only Fortnite grossed more than Call of Duty: Mobile in its first 90 days after launch. Fortnite was able to achieve this despite not launching on Google Play.

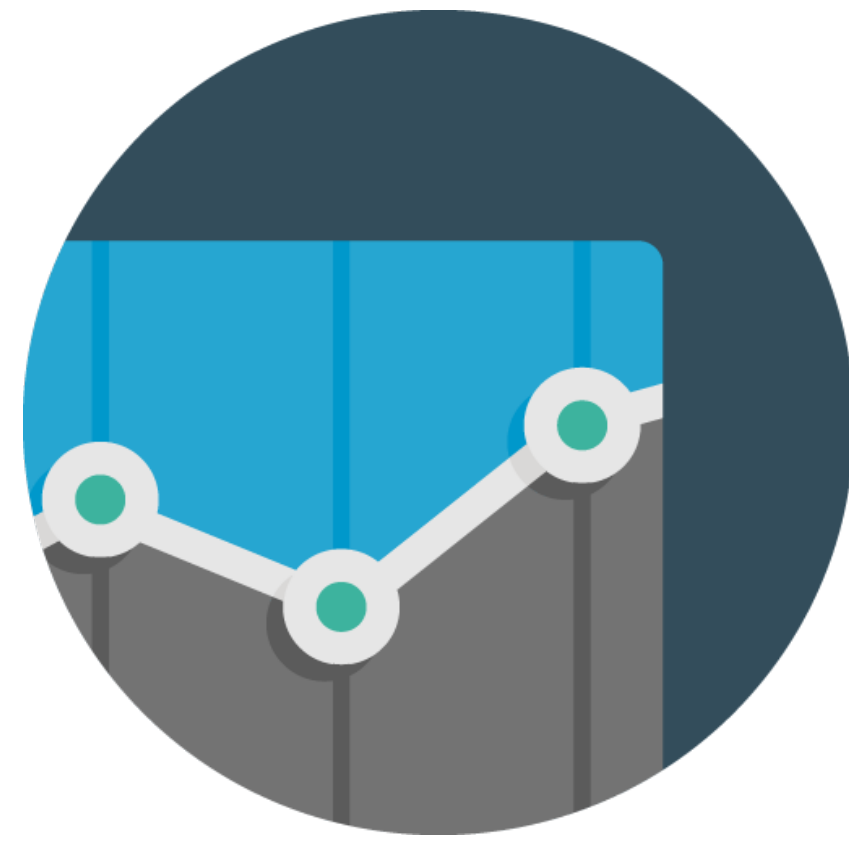
Note Regarding Revenue Estimates
Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1, 2017 through Dec. 31, 2019. Apple apps and Google pre-installed apps are excluded. We report gross revenue (including the cut for Apple or Google). Android estimates do not include third-party stores. Figures represent aggregate installs of all app versions, ex: Facebook and Facebook Lite.

Sensor Tower Solutions



Top Charts & Leaderboards

Monitor app trends throughout the global app economy.



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.

Interested in our market intelligence solutions?

If you want to learn more about Sensor Tower,
please request a demo:

REQUEST DEMO

GET THE LATEST INSIGHTS

Read new analysis of the mobile
app ecosystem every weekday at
[**sensortower.com/blog**](https://sensortower.com/blog)

Sensor Tower

Terms of Use

This report and all original content contained within are wholly owned by Sensor Tower, Inc. © 2020.

Modification, republication, distribution, or other unauthorized usage violate this copyright, unless express permission has been granted.

App icons, images, and other branding assets are property of their respective publishers and are used expressly for the purpose of editorial commentary.

If you would like to republish any of the data contained in this report, please email **info@sensortower.com** for further information.

We're always happy to work with news organizations to provide custom data and research.

Contact **press@sensortower.com** for help.

About Us

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.

Office Locations:

 San Francisco, London, Shanghai, Seoul

Contact Info:

 sensortower.com

 sales@sensortower.com

 @sensortower



