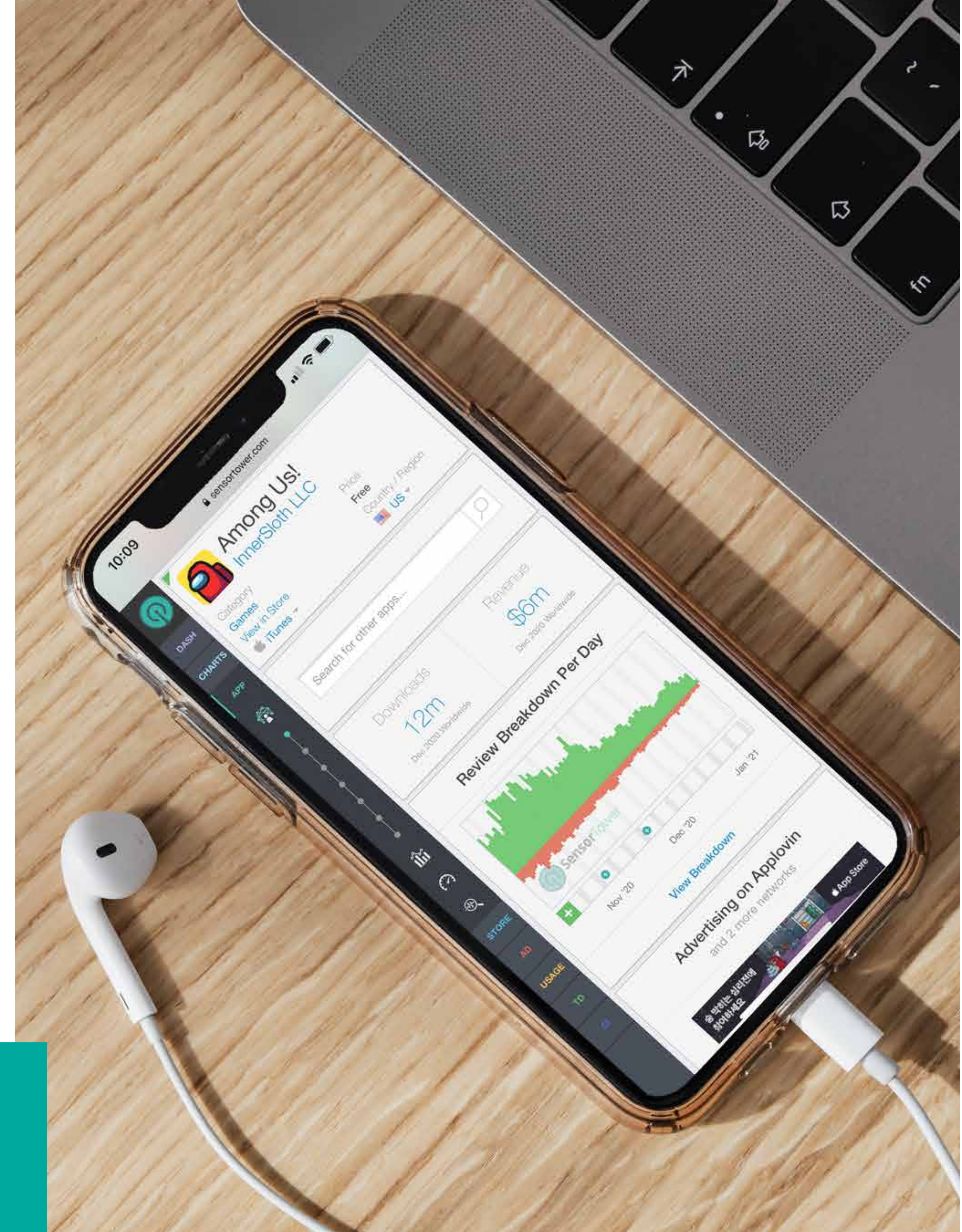
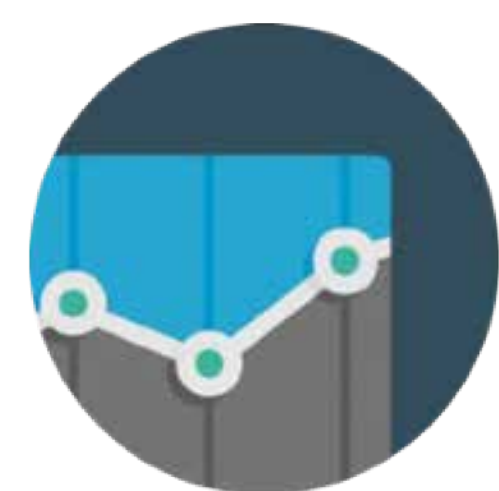


# Q4 2020

## Store Intelligence Data Digest



# Executive Summary: Highlights



**Worldwide app downloads totaled 35.2 billion in 4Q20, a 20.6% year-over-year increase.** Full year downloads grew 23.8% to 143B, including 34.4B on the App Store and 108.6B on Google Play.



**Among Us made a huge surge in the second half of 2020 to rank as the top game by downloads in 2020.** The online social deduction game from InnerSloth provided a way for consumers to stay connected during the pandemic.



**The impact of COVID-19 was felt across the mobile space, and no app better exemplified this than Zoom.** Zoom was the No. 4 app globally by downloads in 2020 and no app saw more Y/Y growth.



**Despite a ban in India earlier in the year, TikTok was the top app by worldwide downloads in Q4 2020 and the full year.** The social video app has fully emerged as a force on mobile.

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*The Q4 2020 Store Intelligence Data Digest offers analysis on the latest mobile trends:*

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Recent trends for travel apps and a look at how demand will return in 2021

# About This Data: Methodology

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

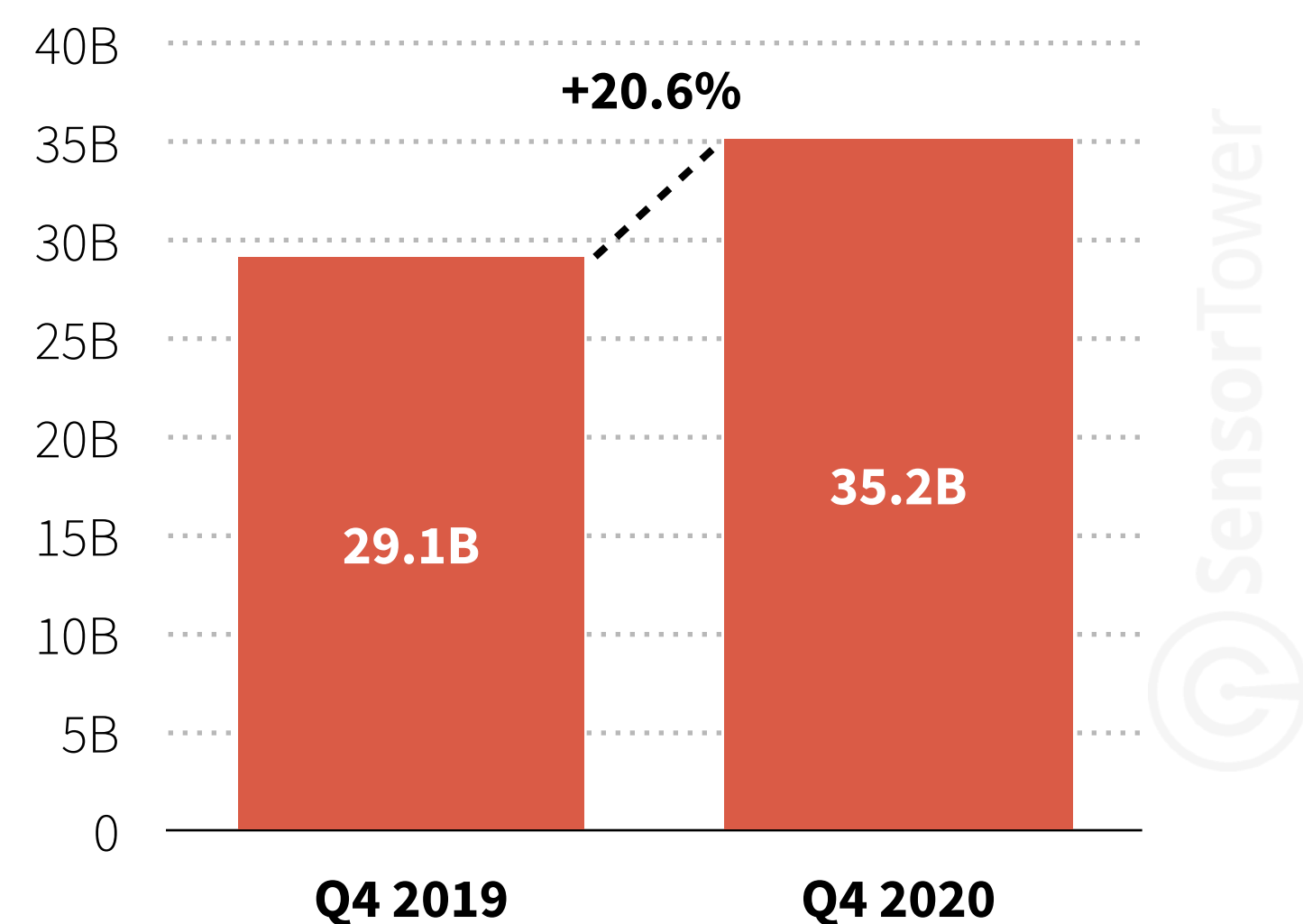
- Figures cited in this report reflect App Store and Google Play download estimates for January 1, 2019 through December 31, 2020.
- Download estimates presented are on a per-user basis, meaning that only one download per Apple or Google account is counted towards the total.
- Downloads of the same app 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 2020 Worldwide Download Growth

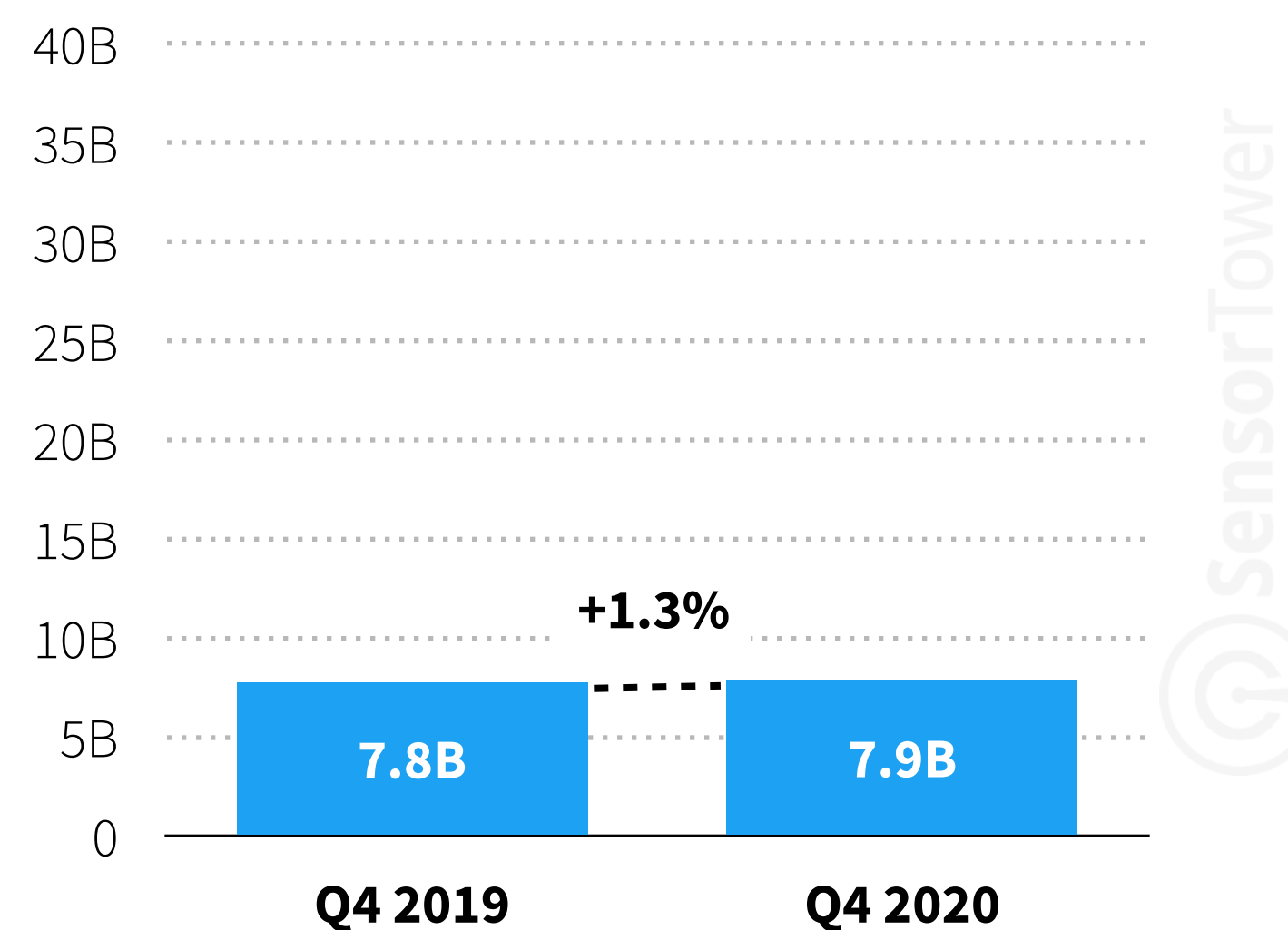
### Worldwide App Store and Google Play Downloads



35.2 Billion

App Store + Google Play Downloads

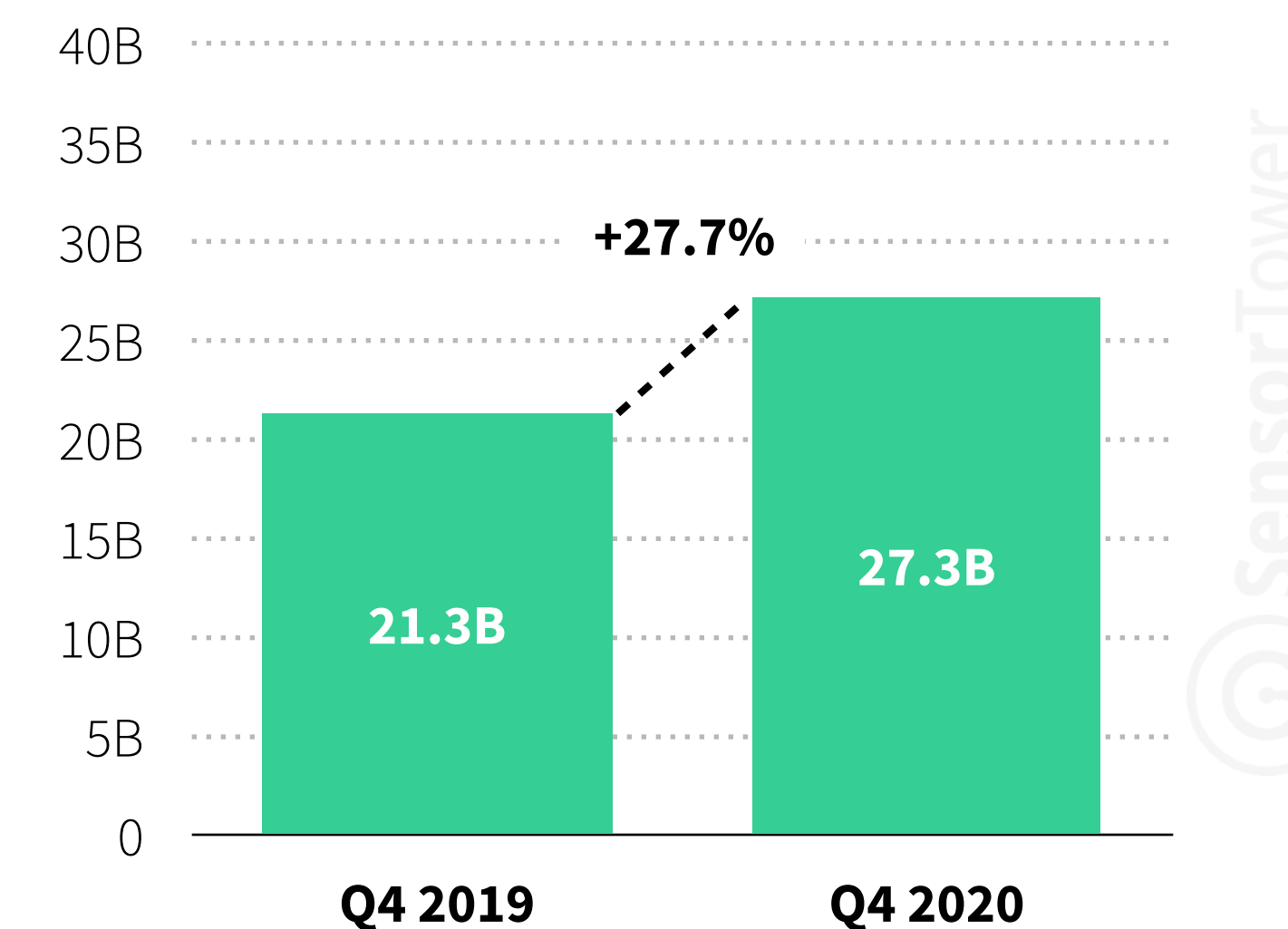
### Worldwide App Store Downloads



7.9 Billion

App Store Downloads

### Worldwide Google Play Downloads



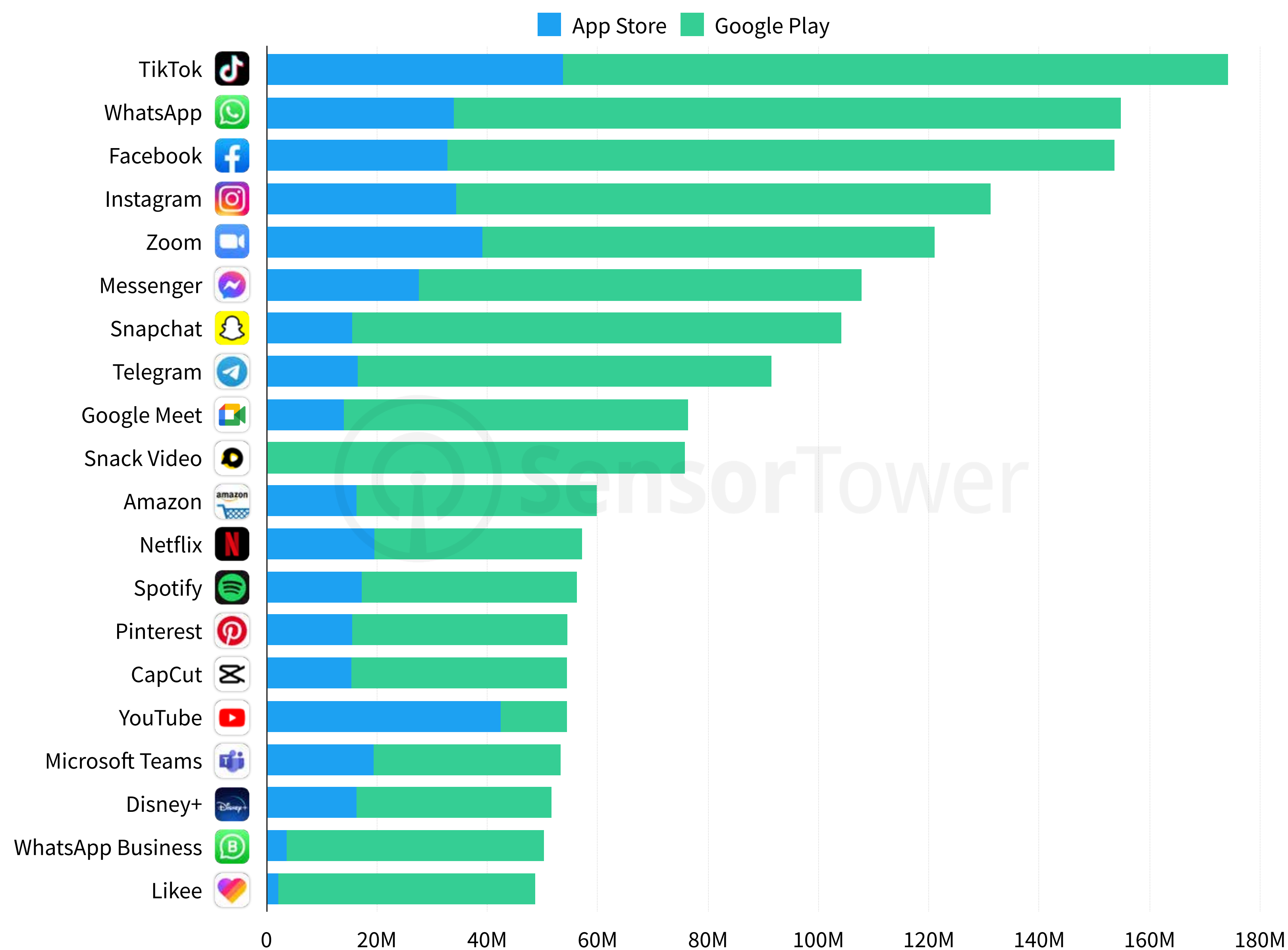
27.3 Billion

Google Play Downloads



# Top Apps

# Overall - Worldwide



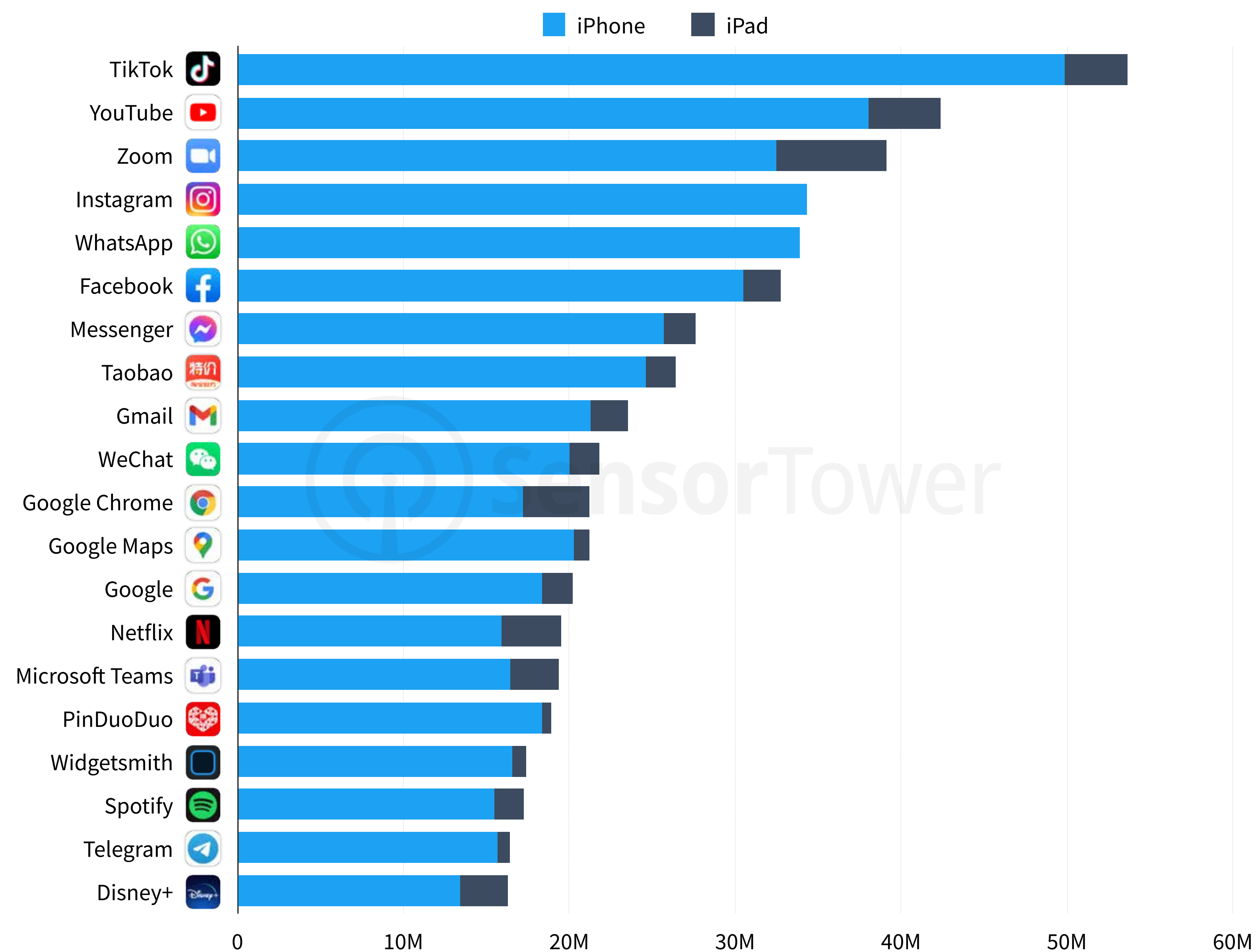
**TikTok was the top app by global downloads in three out of the four quarters in 2020.** A ban in India dampened its growth, with installs down 46 percent from their Q1 2020 peak. Installs outside of India still had positive growth year-over-year.

**Facebook remained a mobile powerhouse with four of the next five apps following TikTok.** Besides TikTok, Zoom was the only non-Facebook app to rank in the top five.

### Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Oct. 1 through Dec. 31, 2020. 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



**While Zoom’s downloads fell each of the past two quarters, demand for video conferencing apps amidst COVID-19 remained high.** Zoom ranked No. 3 on the App Store in Q4 2020, down two spots from its record 94 million downloads in Q2 2020.

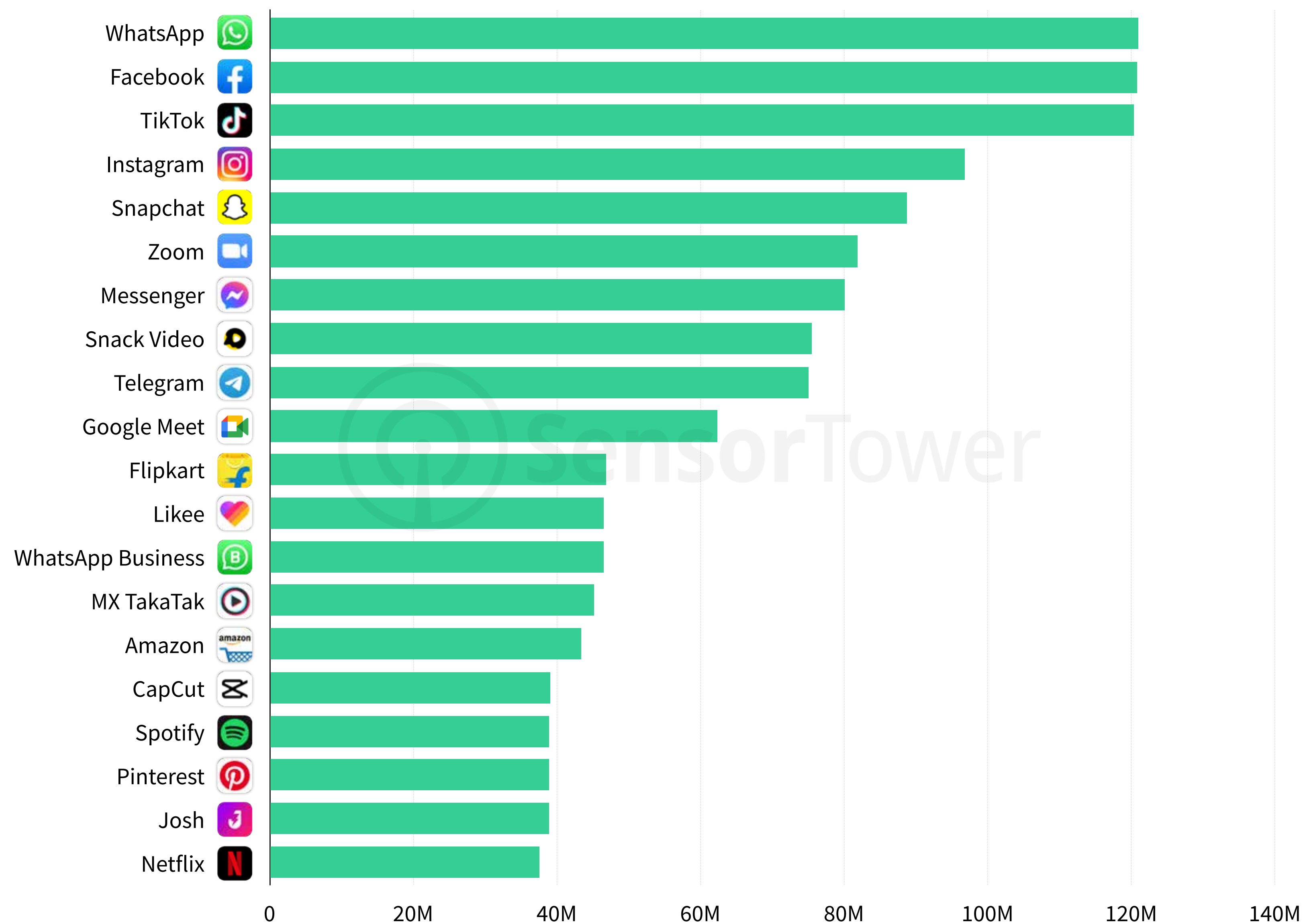
Apple introduced homescreen widgets to iPhone and iPad with its release of iOS 14 in September 2020. **WidgetsSmith was the top homescreen widget app in Q4 2020 with more than 17 million downloads.**

**Note Regarding Download Estimates**

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# Google Play - Worldwide



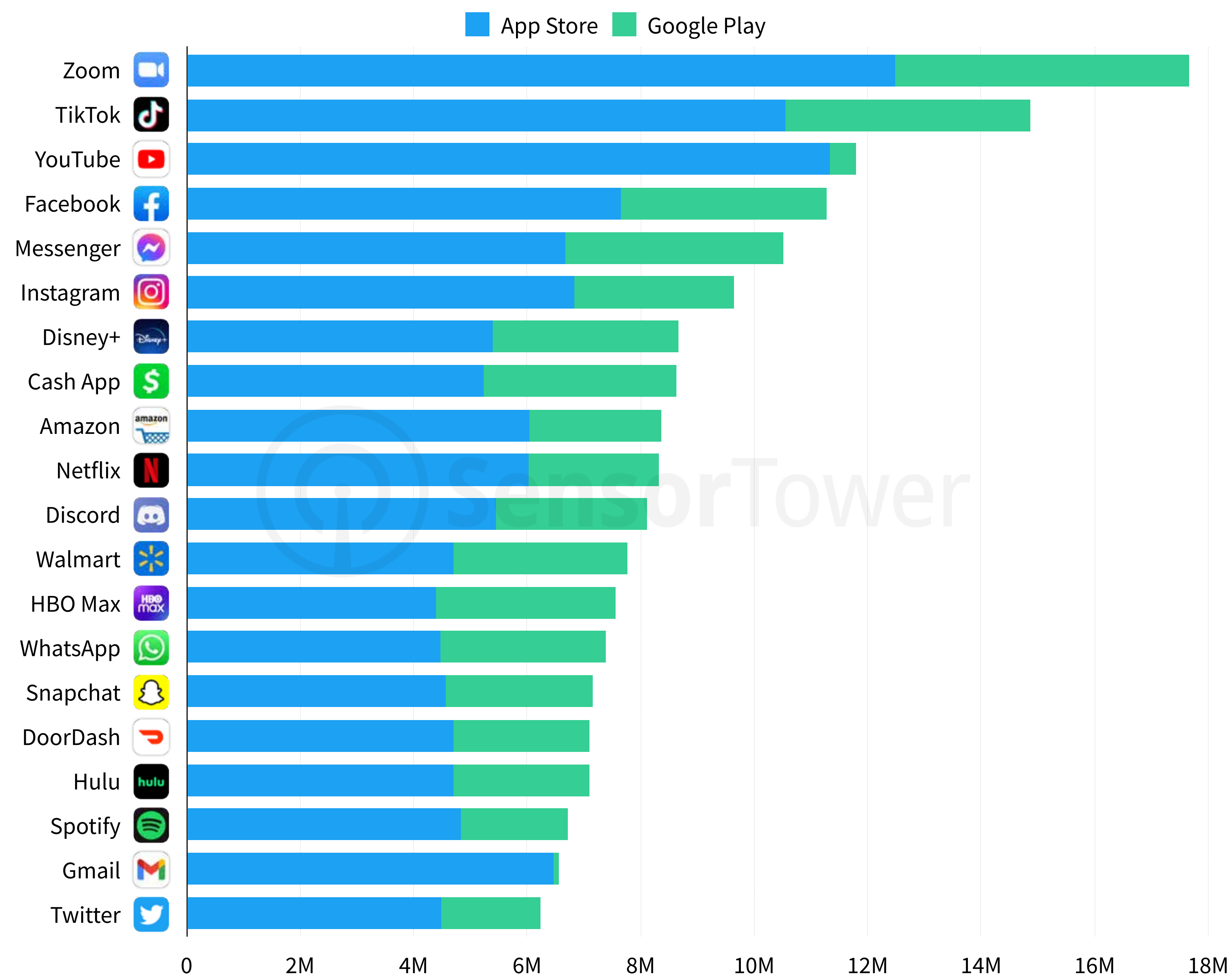
The battle for the top spot on Google Play in Q4 2020 was tight, with WhatsApp, Facebook, and TikTok each separated by less than 500K downloads. WhatsApp took the top spot after falling out of the top five the previous quarter.

Video-sharing social network apps continued to do well in India following the ban of TikTok in June 2020. Snack Video ranked No. 8 on Google Play despite also being banned in India in late November.

### Note Regarding Download Estimates

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# Overall - United States



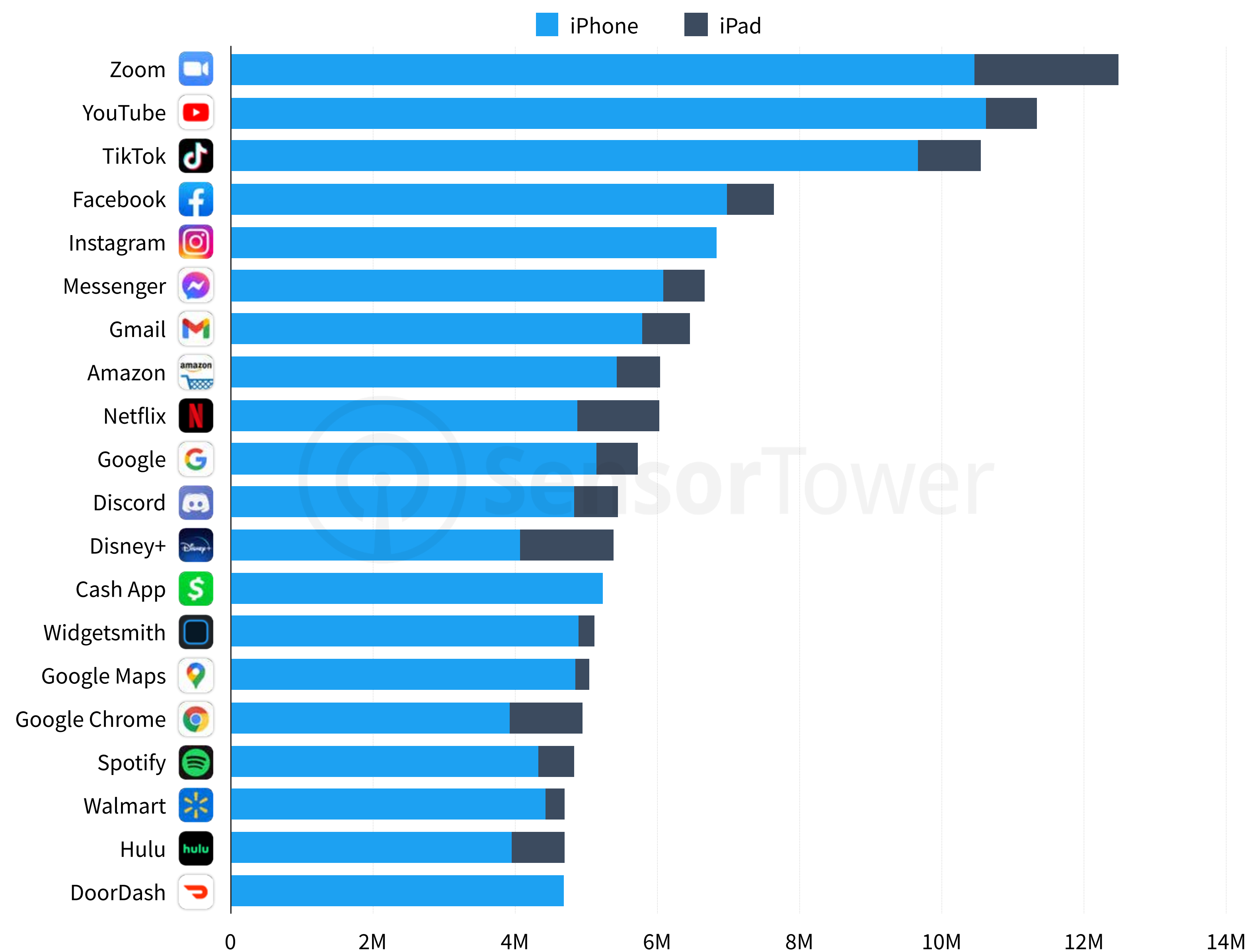
**Zoom was the top app in the U.S. for the third consecutive quarter.** Its installs were down more than 50 percent from their peak at 41 million in Q2 2020 as offices and schools closed in response to COVID-19.

**Meanwhile, Discord’s U.S. installs have continued to rise during the pandemic.** It reached No. 11 with a new high 8.1 million downloads in Q4 2020, up 161 percent Y/Y.

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# App Store - United States



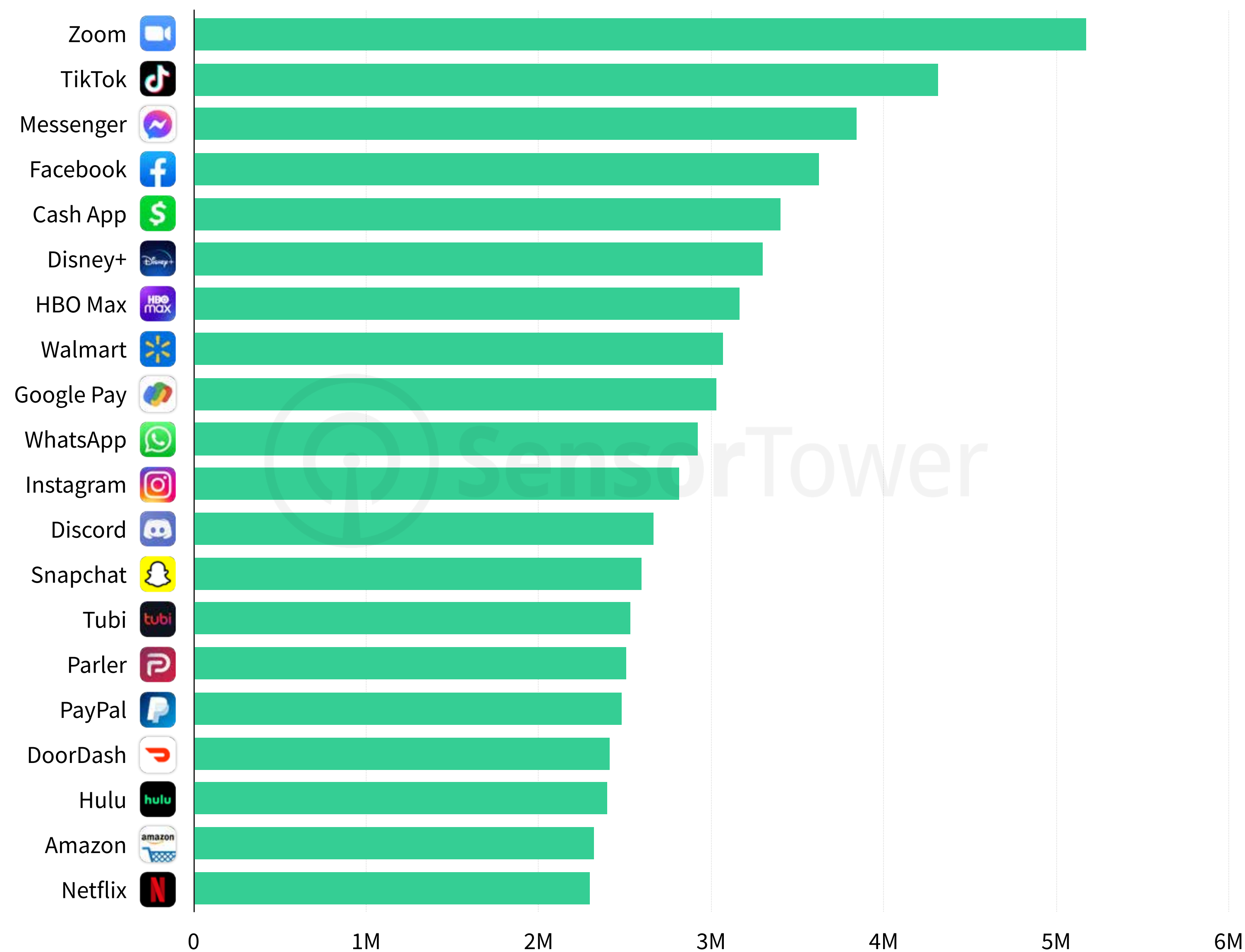
**YouTube was a consistent top performer on the U.S. App Store, surpassing 11 million downloads for three straight quarters.** Its previous high entering 2020 was 9.1 million.

**Amazon was the only app to enter the top 10 in Q4 2020 vs. Q3.** Holiday shopping helped propel it to one of its best quarters on the U.S. App Store, second only to Q2 2020 when consumers turned to Amazon as a safe way to shop during COVID-19.

**Note Regarding Download Estimates**

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# Google Play - United States



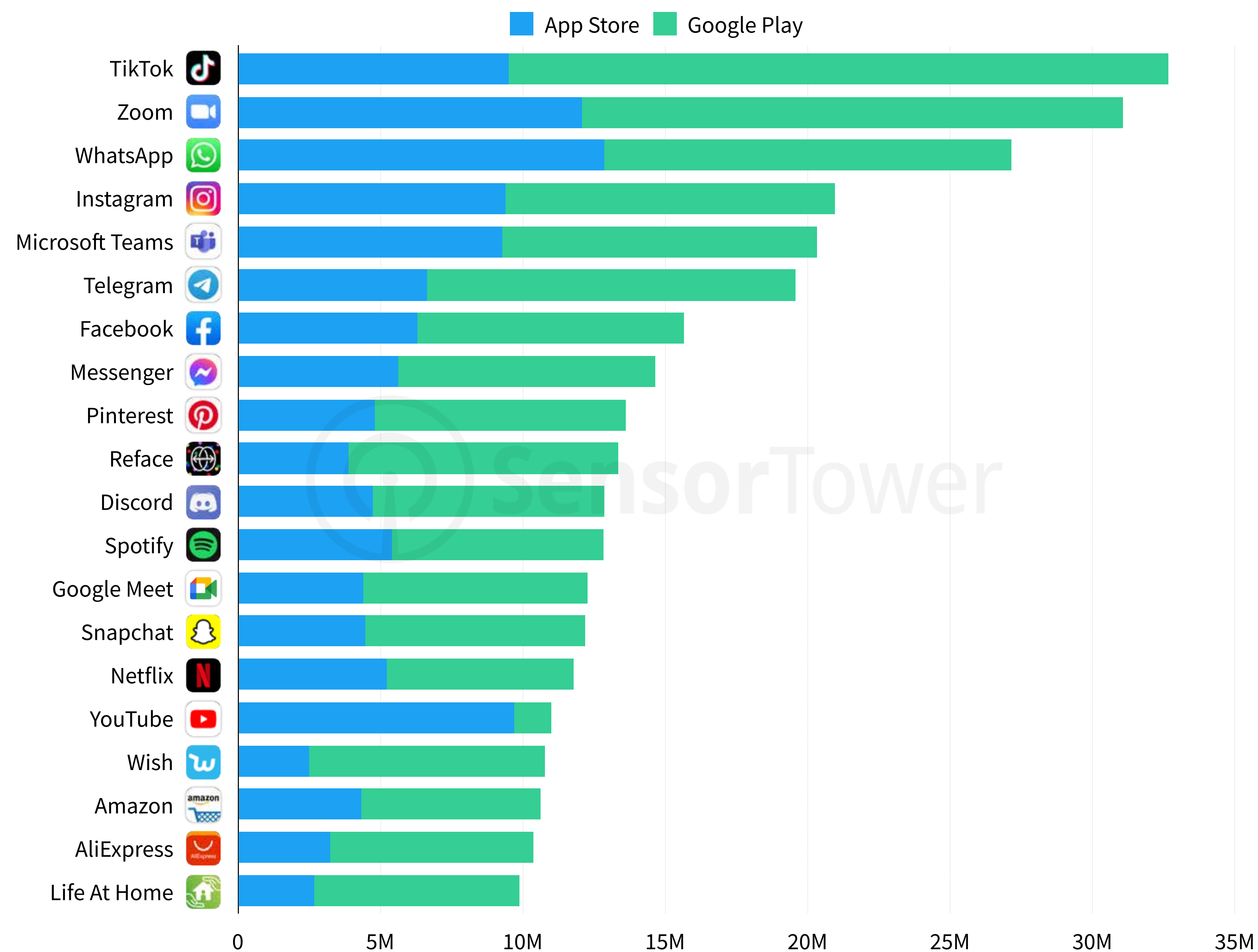
**HBO Max, a new streaming service launched in May 2020 that replaced existing HBO apps, was very successful on Google Play.** Its 3.2 million new downloads in the U.S. were an all-time high and up 51 percent Q/Q.

**Google Pay was another app with a successful relaunch, adding new features to its U.S. app in November 2020.** It surpassed 2 million downloads on Google Play in December alone.

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# Overall - Europe



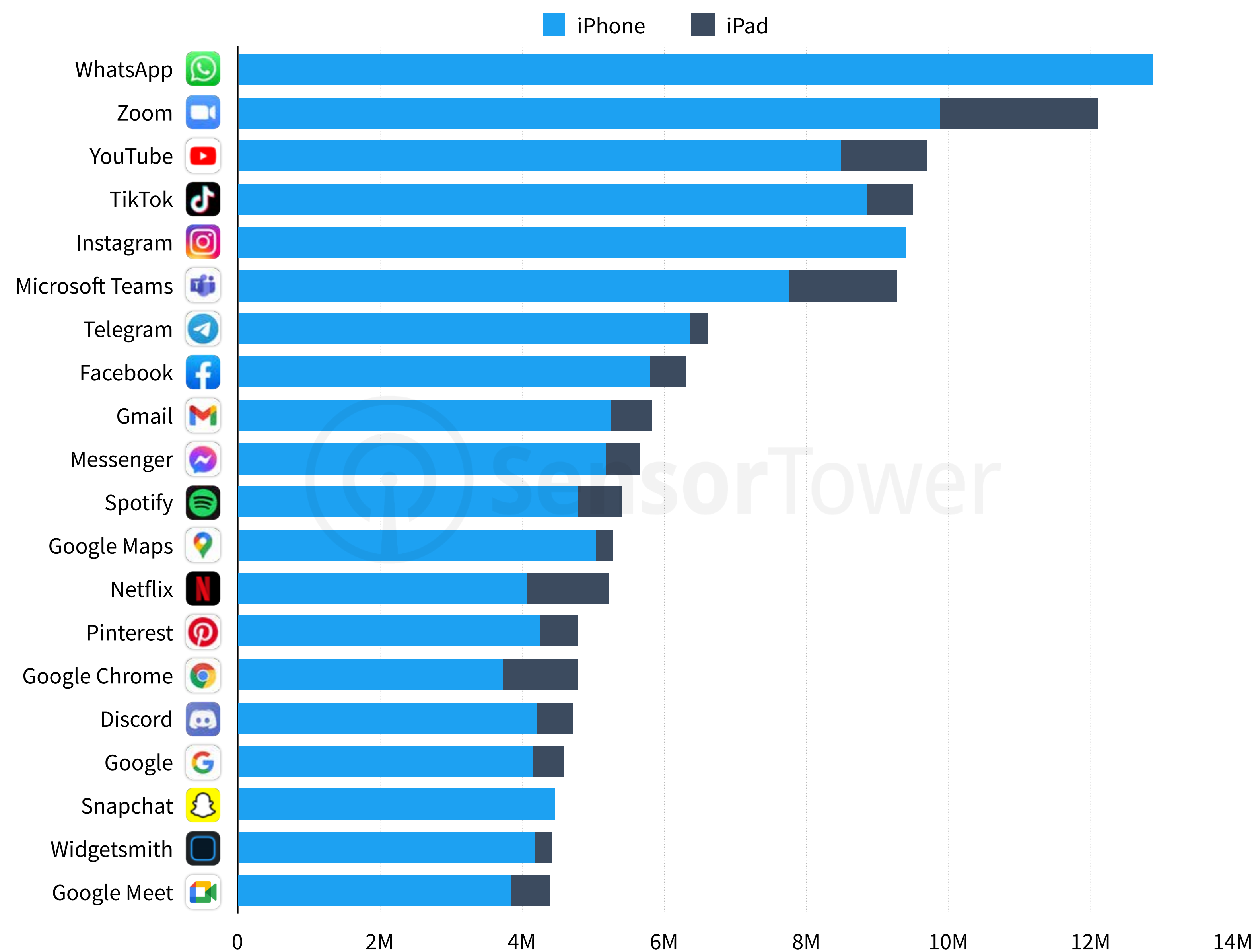
After Europe began to reopen in the fall, COVID-19 cases surged again in Q4. **Demand for top video conferencing apps surged with it, with Zoom (No. 2), Microsoft Teams (No. 5), and Google Meet (No. 13) all rising up the ranks compared to Q3.**

**TikTok was the top app in Europe for the second consecutive quarter.** Its top markets included Russia (with 31 percent of the app’s downloads in the region), Turkey (18 percent), and Ukraine (7 percent).

### Note Regarding Download Estimates

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# App Store - Europe



**WhatsApp from Facebook was the top App Store app in Europe.** Its European downloads rose steadily during 2020 to reach their highest total since Q3 2018.

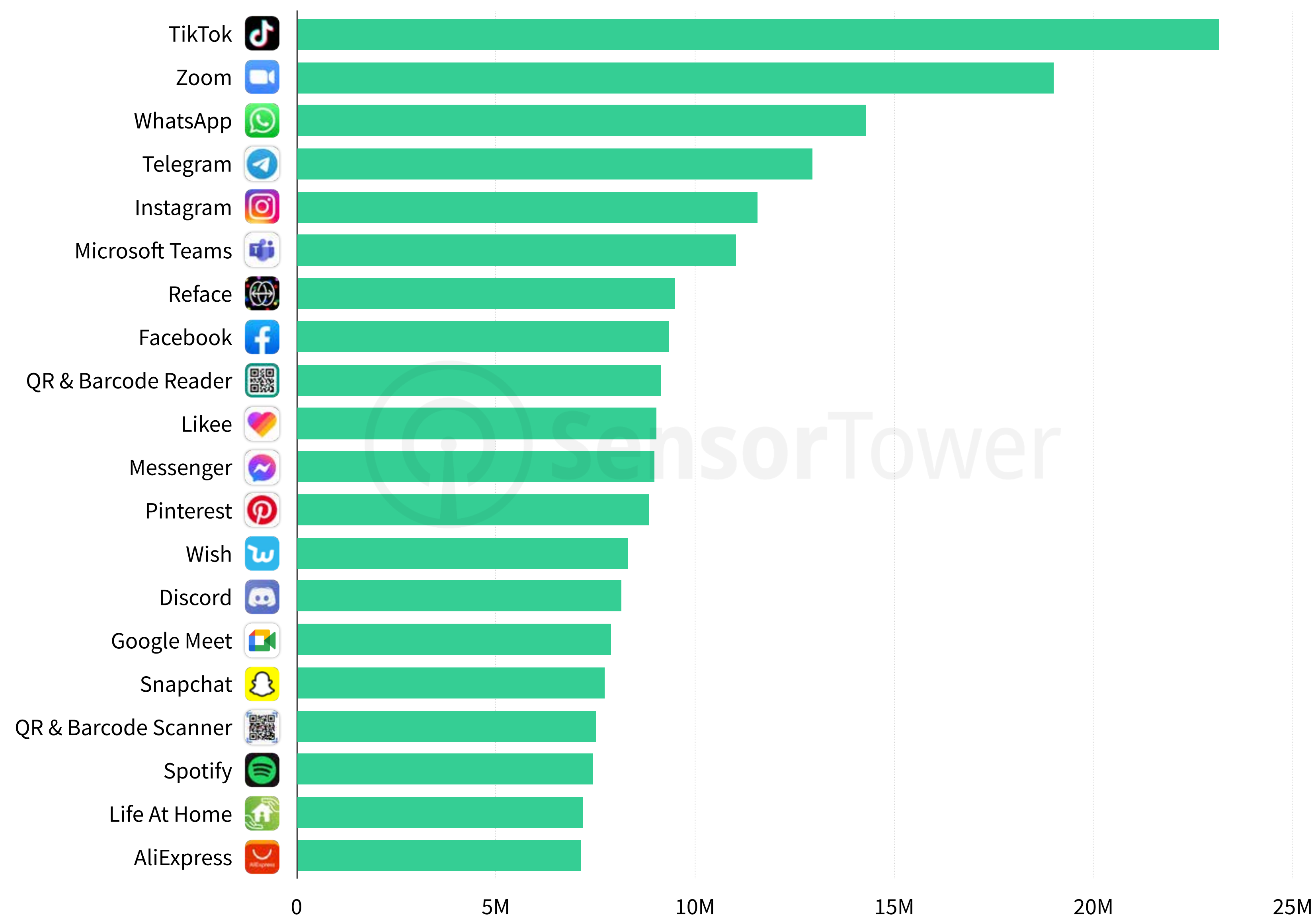
**Google had six of the top 20 App Store apps in Europe, led by YouTube and Gmail.**

Google Maps fell from No. 4 in Q3 2020 to No. 12 in Q4 as some countries imposed lockdowns or other additional restrictions around COVID-19.

**Note Regarding Download Estimates**

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# Google Play - Europe



**TikTok was the top app in Europe on Google Play, surpassing 20 million downloads for the fifth consecutive quarter.** Zoom moved up four spots from Q3 rank No. 2 in the quarter, and WhatsApp rounded out the top three.

**Top video conferencing apps were most popular in a variety of European countries.** Zoom's top country was Turkey, while Poland and Italy were the top markets for Microsoft Teams and Google Meet, respectively.

**Note Regarding Download Estimates**

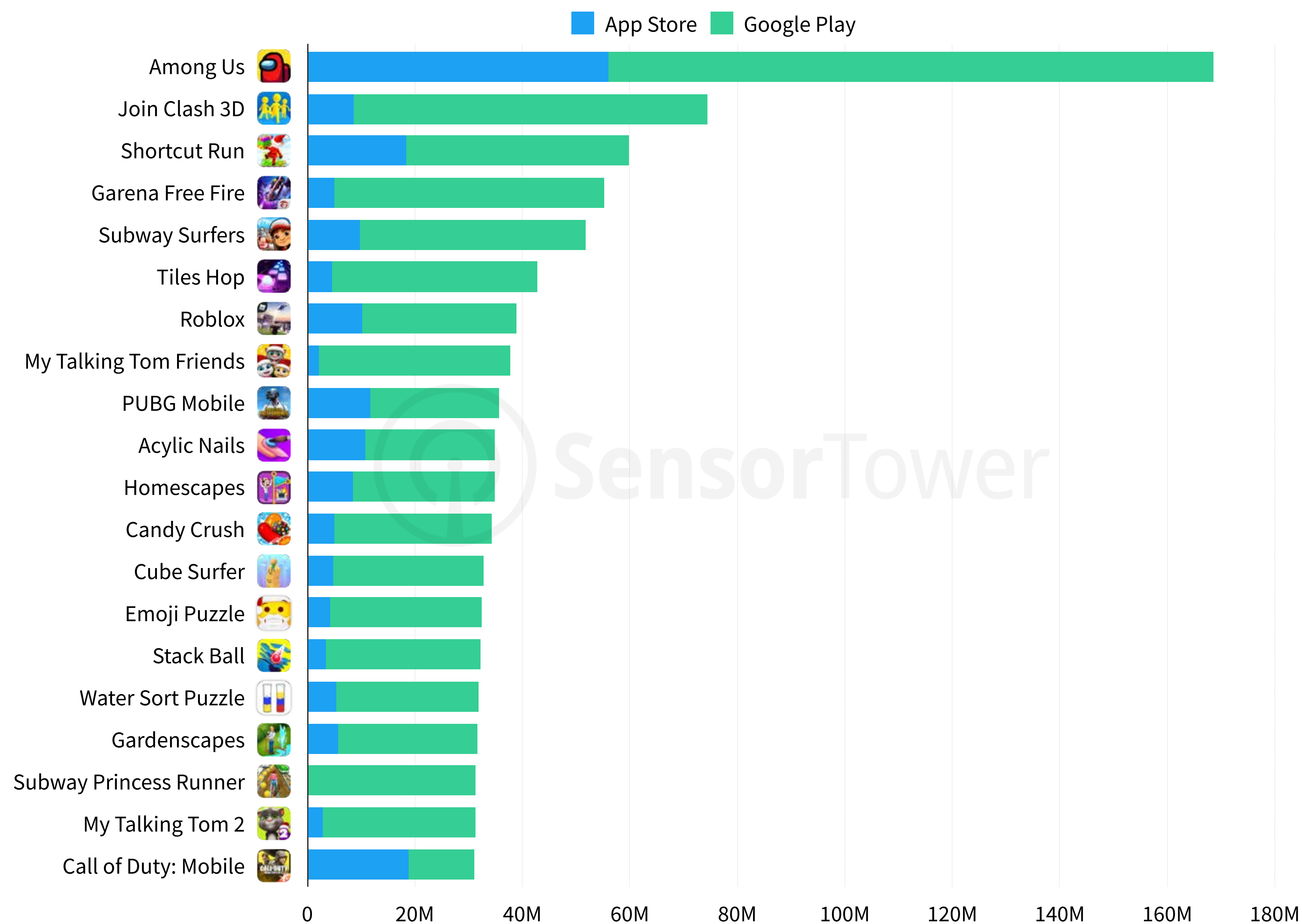
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# Top Games



# Overall - Worldwide



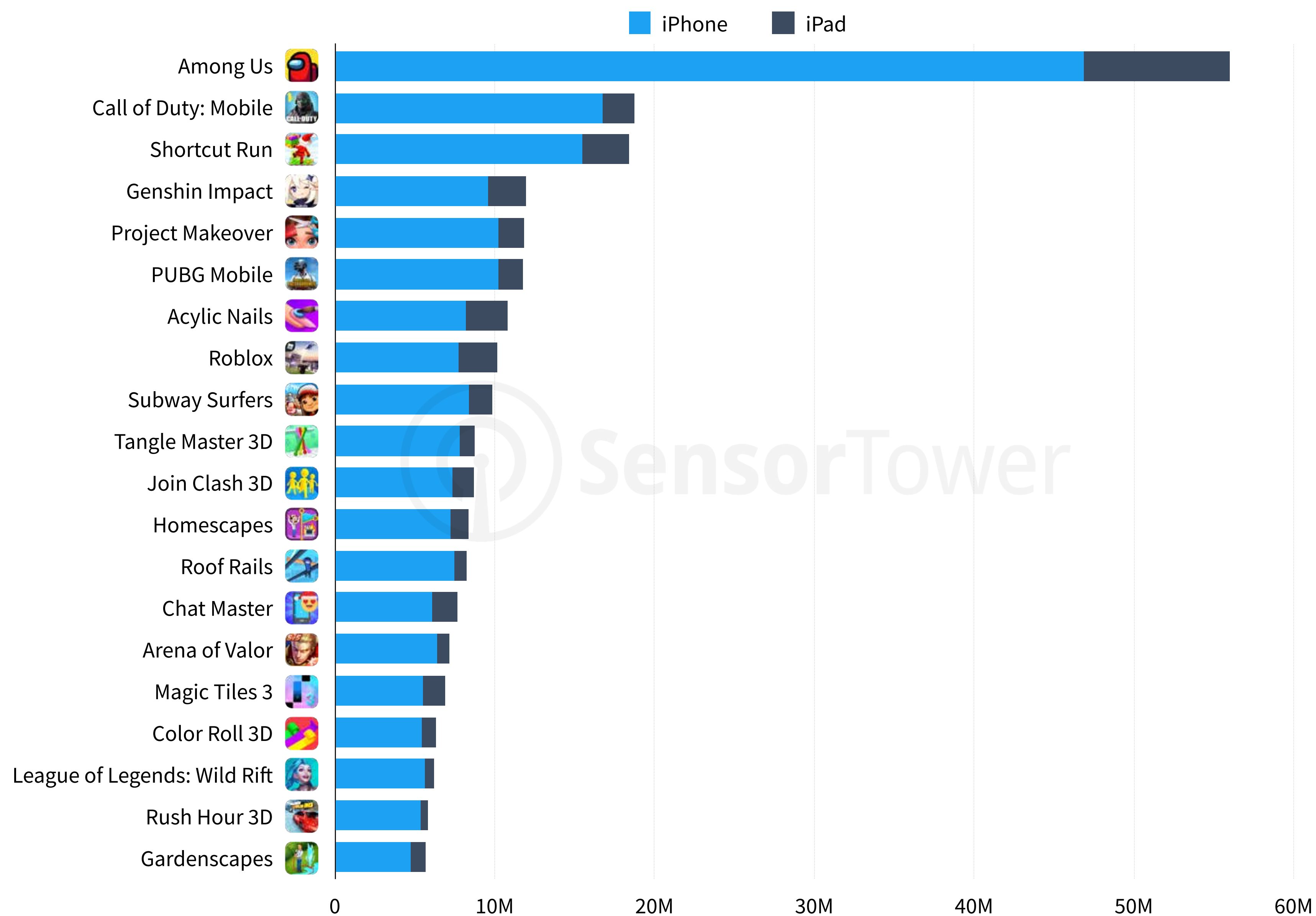
**Among Us, an online social deduction game from InnerSloth, was the top game by worldwide downloads for consecutive quarters.** Its 166 million downloads in Q4 2020 was the best quarter from any game since Call of Duty: Mobile in Q4 2019.

**Garena Free Fire was one of the most consistent top performers in 2020.** It ranked No. 4 for the quarter and finished only behind Among Us by downloads in 2020.

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# App Store - Worldwide



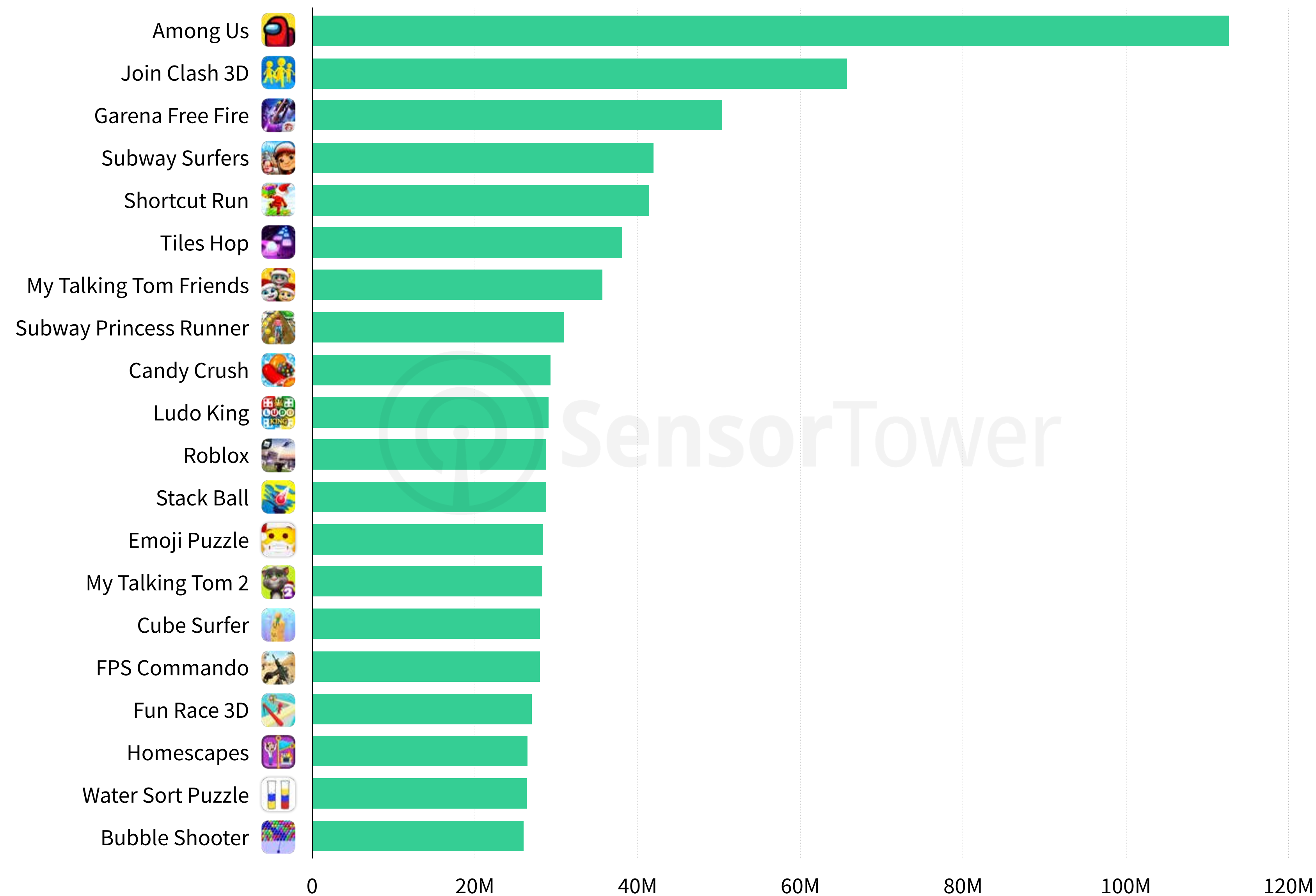
**Call of Duty: Mobile ranked No. 2 on the App Store, boosted by its release on December 25 in China.** It accumulated nearly 10 million App Store downloads in China in its first week.

**Genshin Impact was a new entrant to the top 20 after its release late in Q3 2020, ranking at No. 4.** Its top markets on the App Store included China, the U.S., and Japan.

**Note Regarding Download Estimates**

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# Google Play - Worldwide



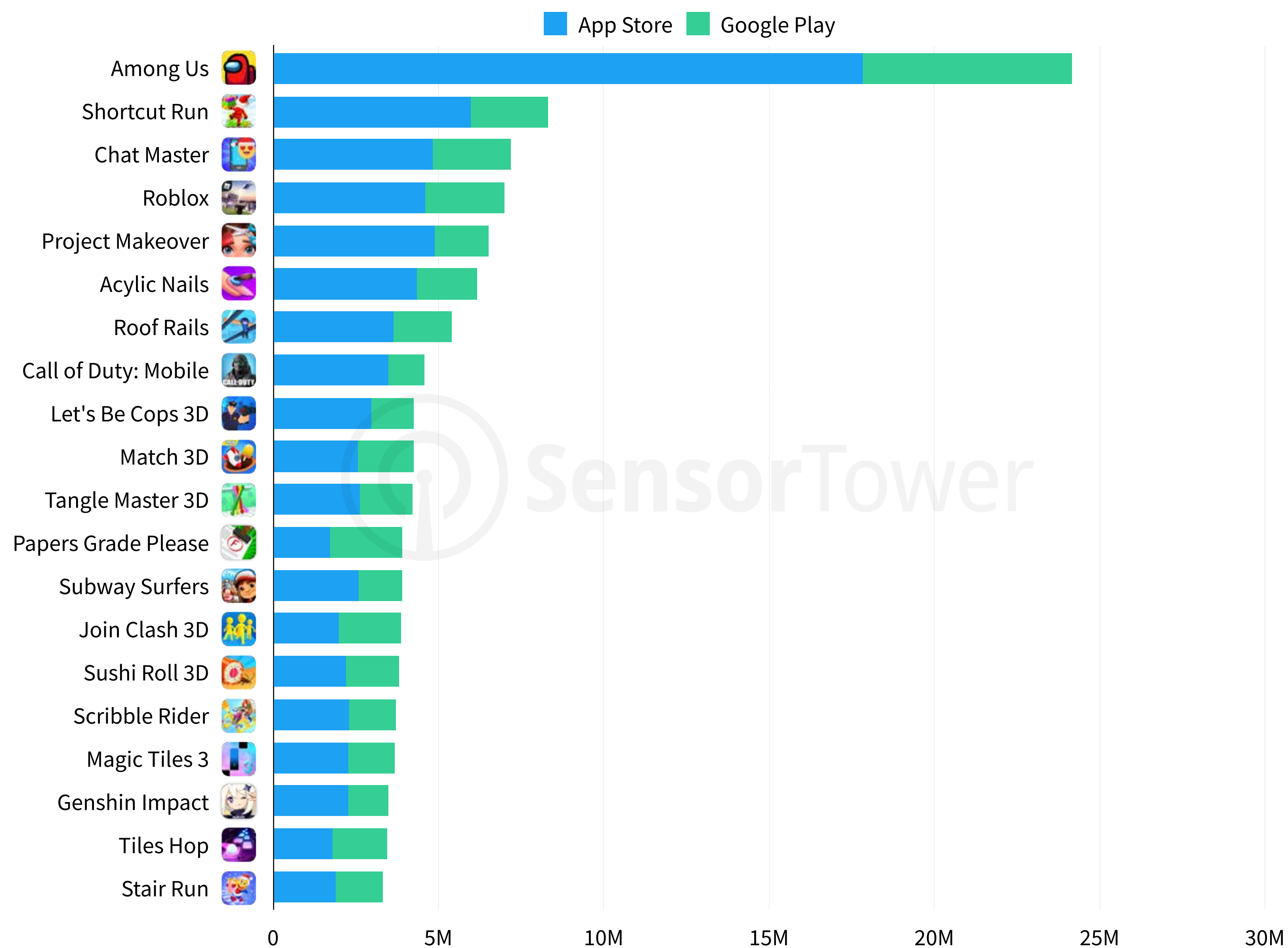
**Among Us surpassed 112 million installs on Google Play, up 80 percent Q/Q.** It was the best quarter for any game on the platform since Pokémon Go in Q3 2016.

**Join Clash 3D from Supersonic Studios was the No. 2 game in the quarter.** Supersonic Studios had one additional game among the top 20, Emoji Puzzle.

### Note Regarding Download Estimates

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# Overall - United States



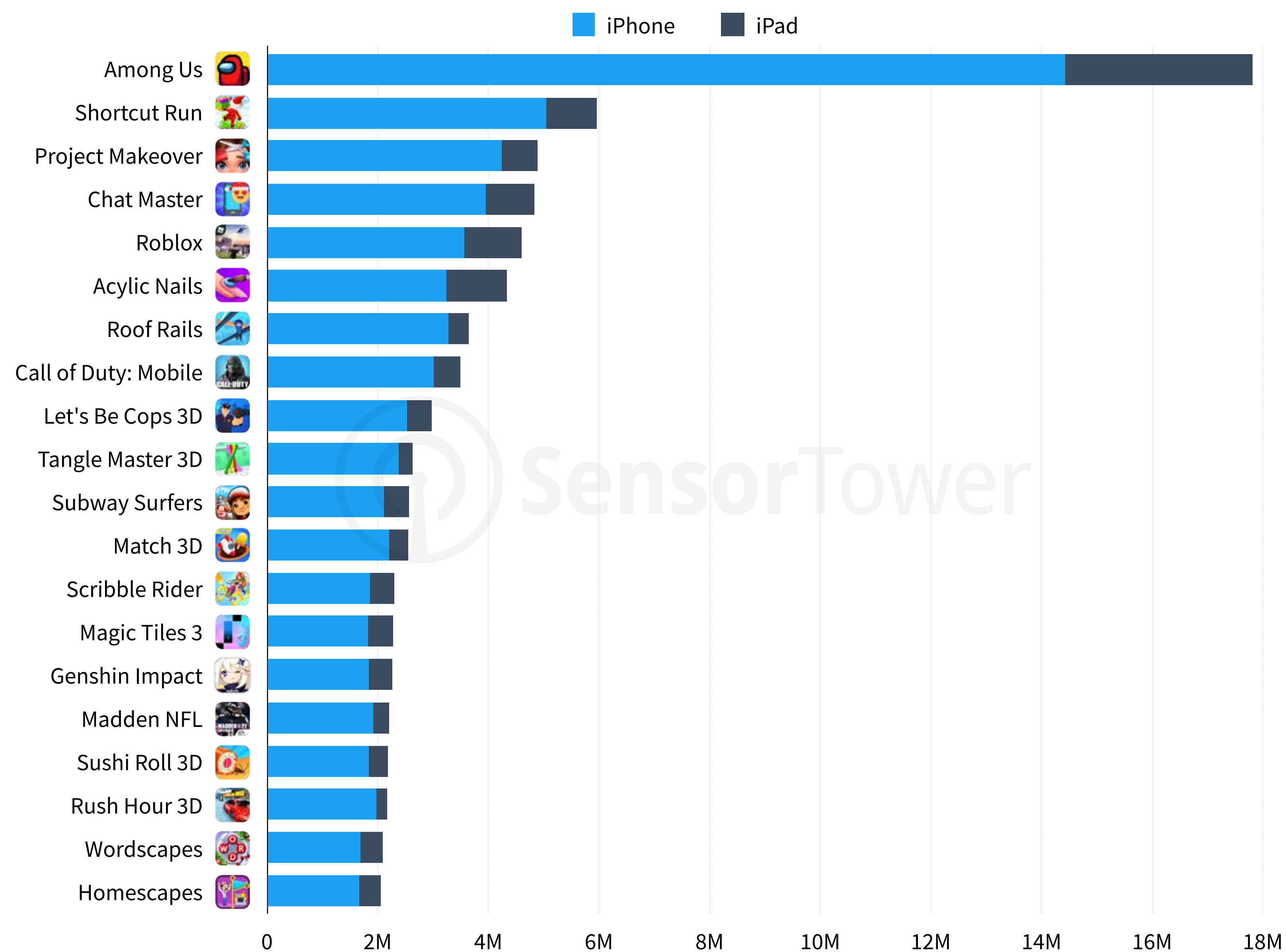
**Among Us was also the top game in the U.S. both of the past two quarters, with roughly 24 million downloads each quarter.** No other game reached even 10 million U.S. installs in either Q3 or Q4 2020.

**Roblox had another strong quarter in the U.S. ahead of its IPO.** It was the No. 4 game in Q4 2020 and finished No. 2 in the U.S. behind Among Us in 2020.

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# App Store - United States

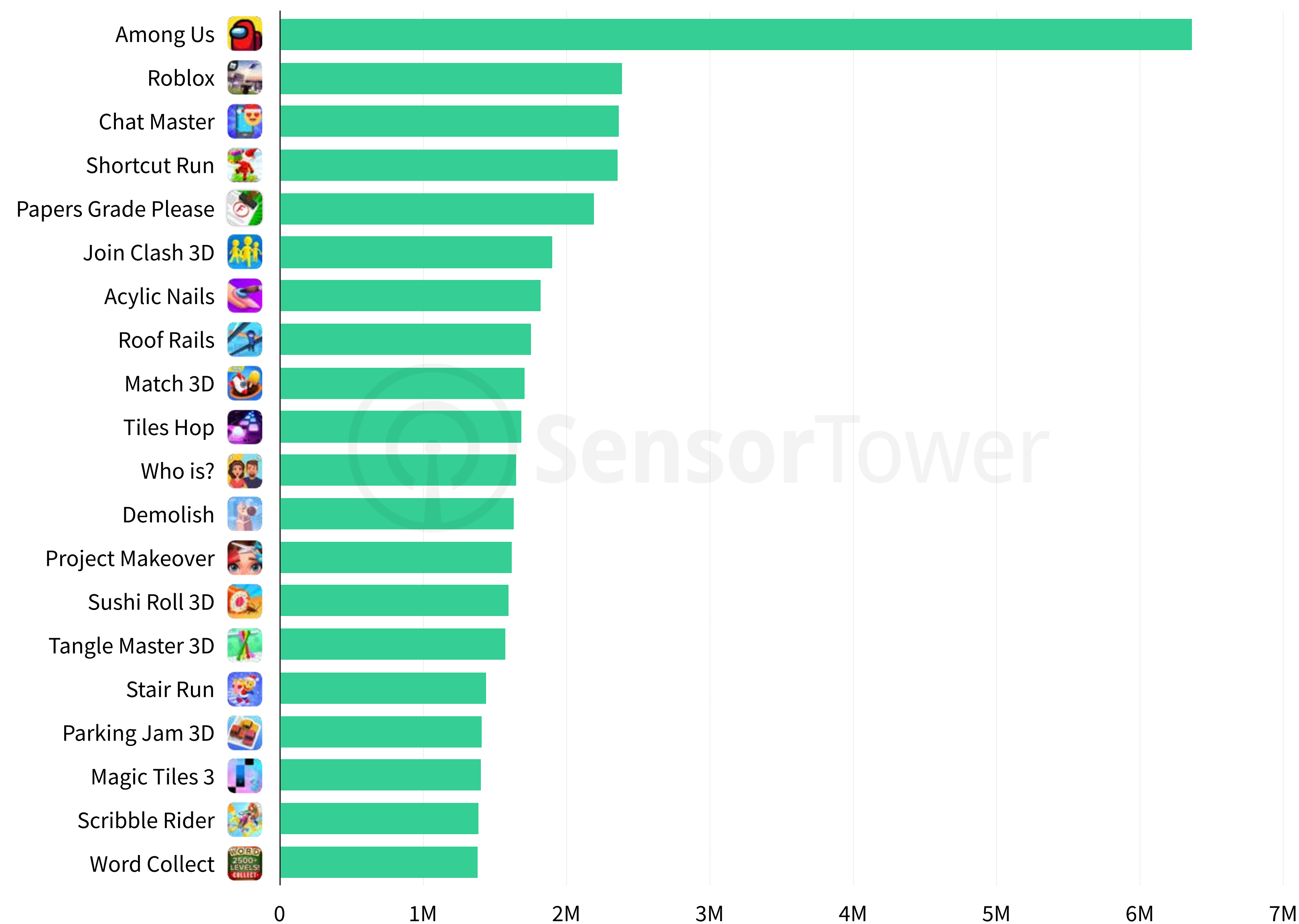


**Genshin Impact entered the top 20 for the first time at No. 14.** The U.S. was Genshin Impact's second largest market on the App Store with 19 percent of its downloads, only behind China with 36 percent.

**Hypercasual games publisher Voodoo had three of the top 20 games,** including Shortcut Run, Roof Rails, and Scribble Rider. Voodoo was the No. 2 publisher overall on the U.S. App Store in Q4.

**Note Regarding Download Estimates**  
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# Google Play - United States



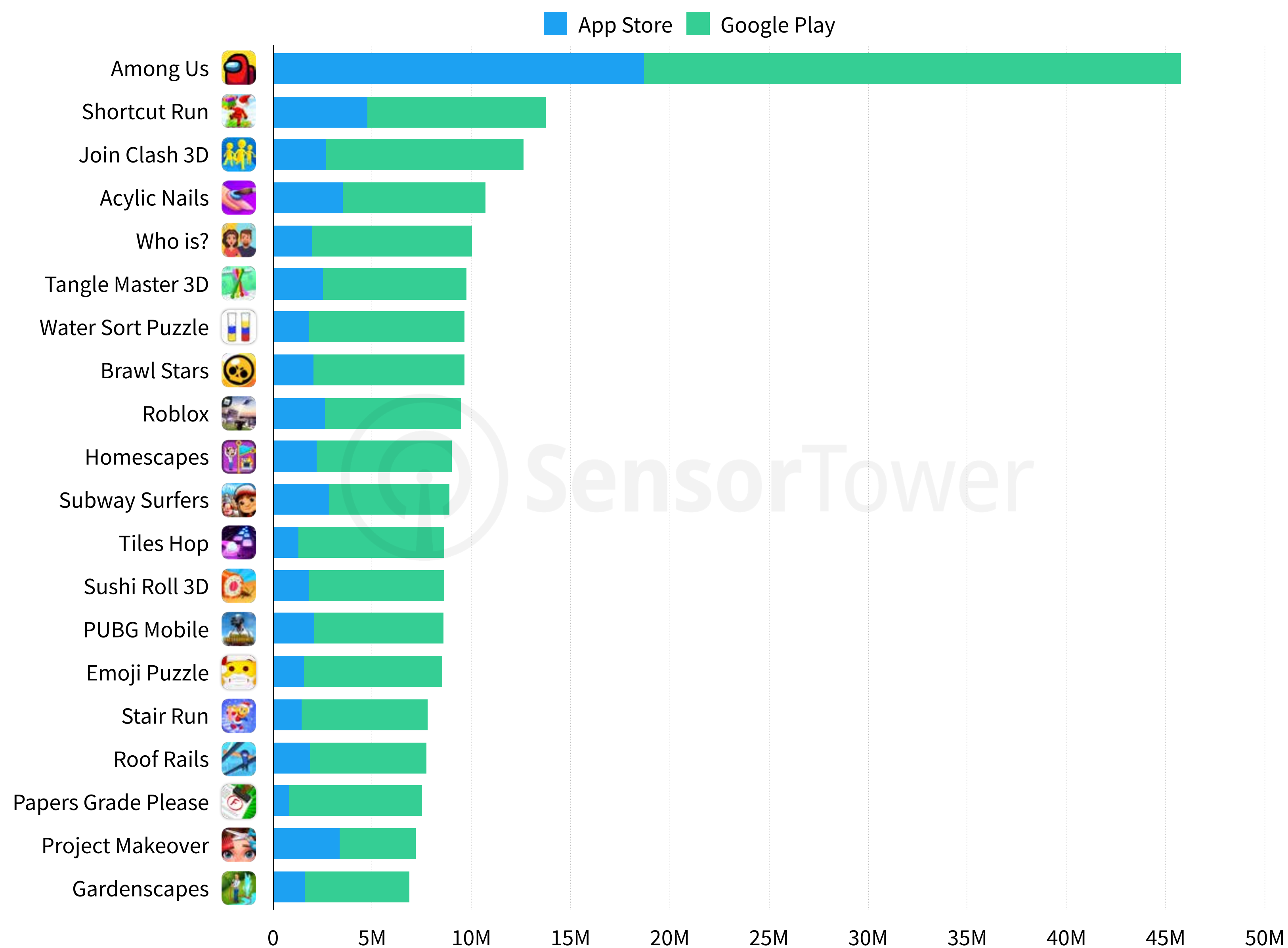
**Among Us and Roblox were the only games in the top 10 in Q3 2020 to return to the top 10 in Q4.** The high turnover reflects the number hypercasual titles among the top list. These tend to have shorter retention than other game genres.

**Top hypercasual publishers represented among the top 10 included Supersonic Studios, Voodoo, AppLovin's Lion Studios, and Crazy Labs.** The space remained competitive in Q4 2020.

### Note Regarding Download Estimates

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# Overall - Europe



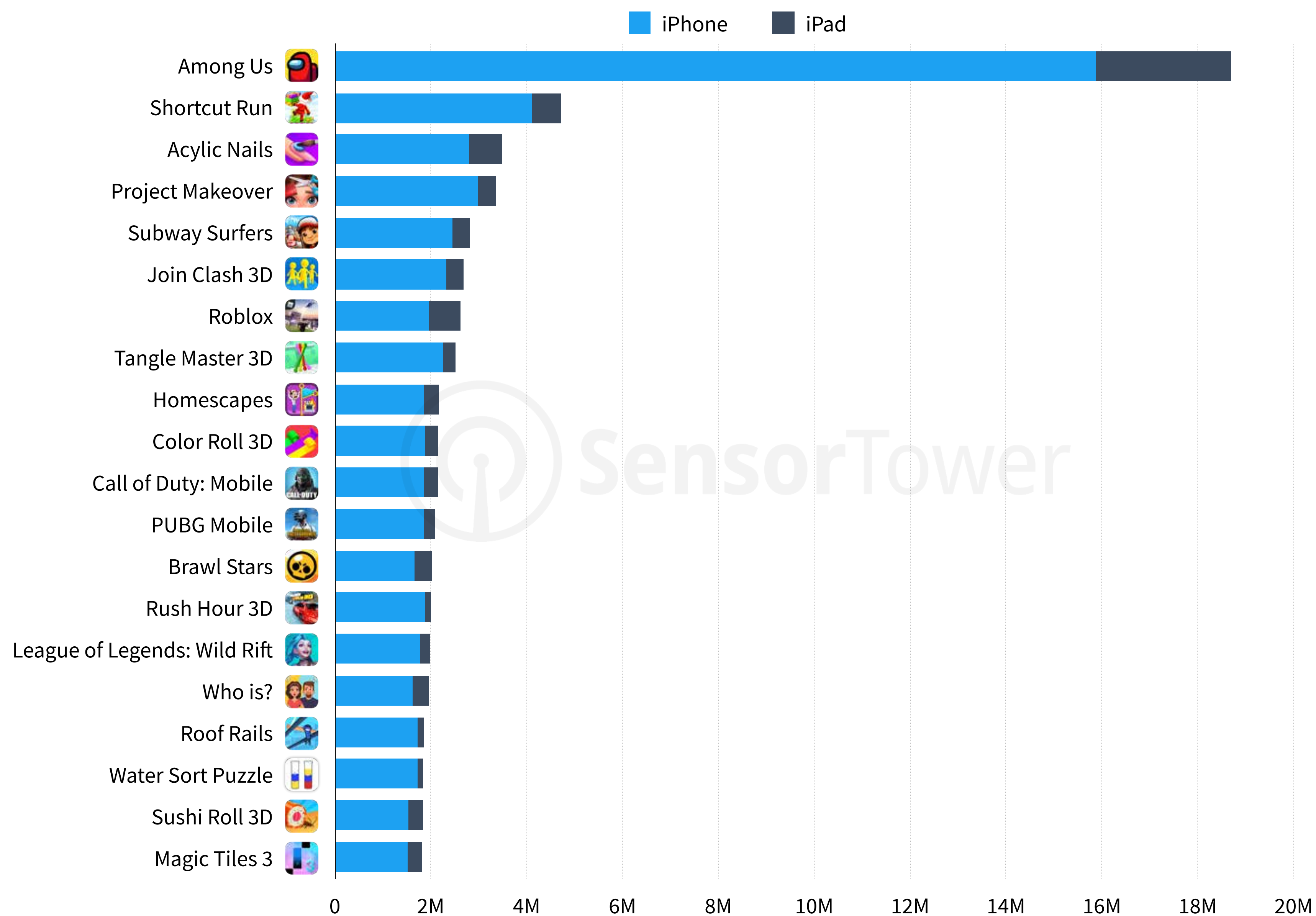
**Among Us took a bit longer to take hold in Europe than it did in the U.S.** Its downloads increased more than 2.5x between Q3 and Q4 2020 as it took the top spot in Europe for the first time.

**Brawl Stars dipped a bit in Q4 2020 but still managed to rank among the top 10.** It was the No. 5 game in Europe each of the previous two quarters.

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# App Store - Europe



**Among Us achieved a new level of popularity in Europe, with more App Store downloads in Q4 2020 than any other game had in all of 2020.** Its Q4 2020 was twice as high as the next best quarter for a game that year.

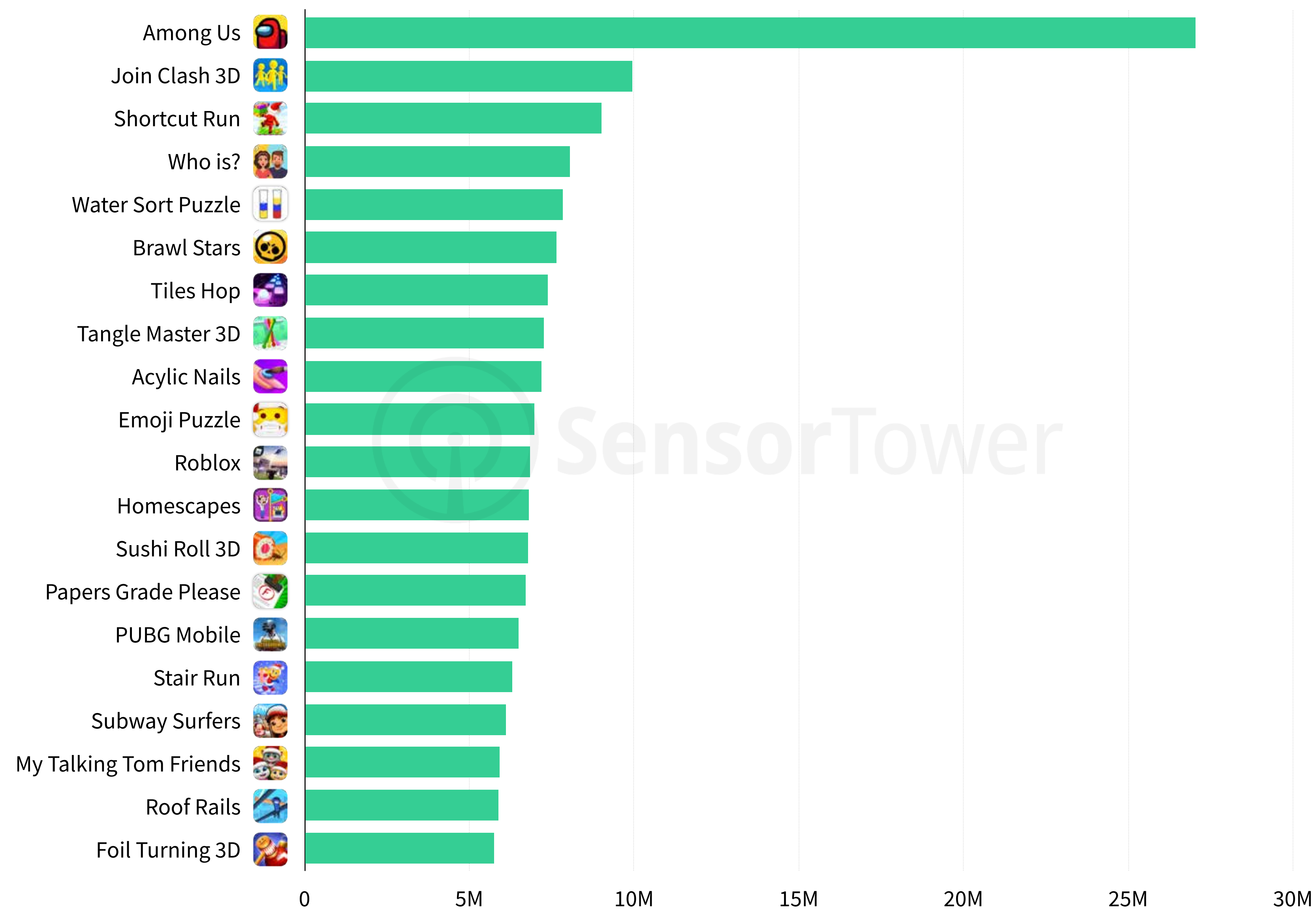
**After a quarter ranked outside of the top 20, Call of Duty: Mobile returned at No. 11 in Q4 2020.** It had more than 2.1 million App Store downloads in the region, reflecting 35 percent Q/Q growth.

### Note Regarding Download Estimates

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# Google Play - Europe



**Among Us** was also hugely popular on **Google Play**, though its success was less **unprecedented on that platform than on the App Store**. Its 27 million downloads in Q4 was still well ahead of the next best quarter from a game this year. **Save The Girl** had 23 million downloads back in Q2.

**Brawl Stars** was the only game besides **Among Us** among the top 10 on **Google Play** in both **Q3 and Q4 2020**. It dropped one spot from No. 5 in Q3 to No. 6 in Q4.

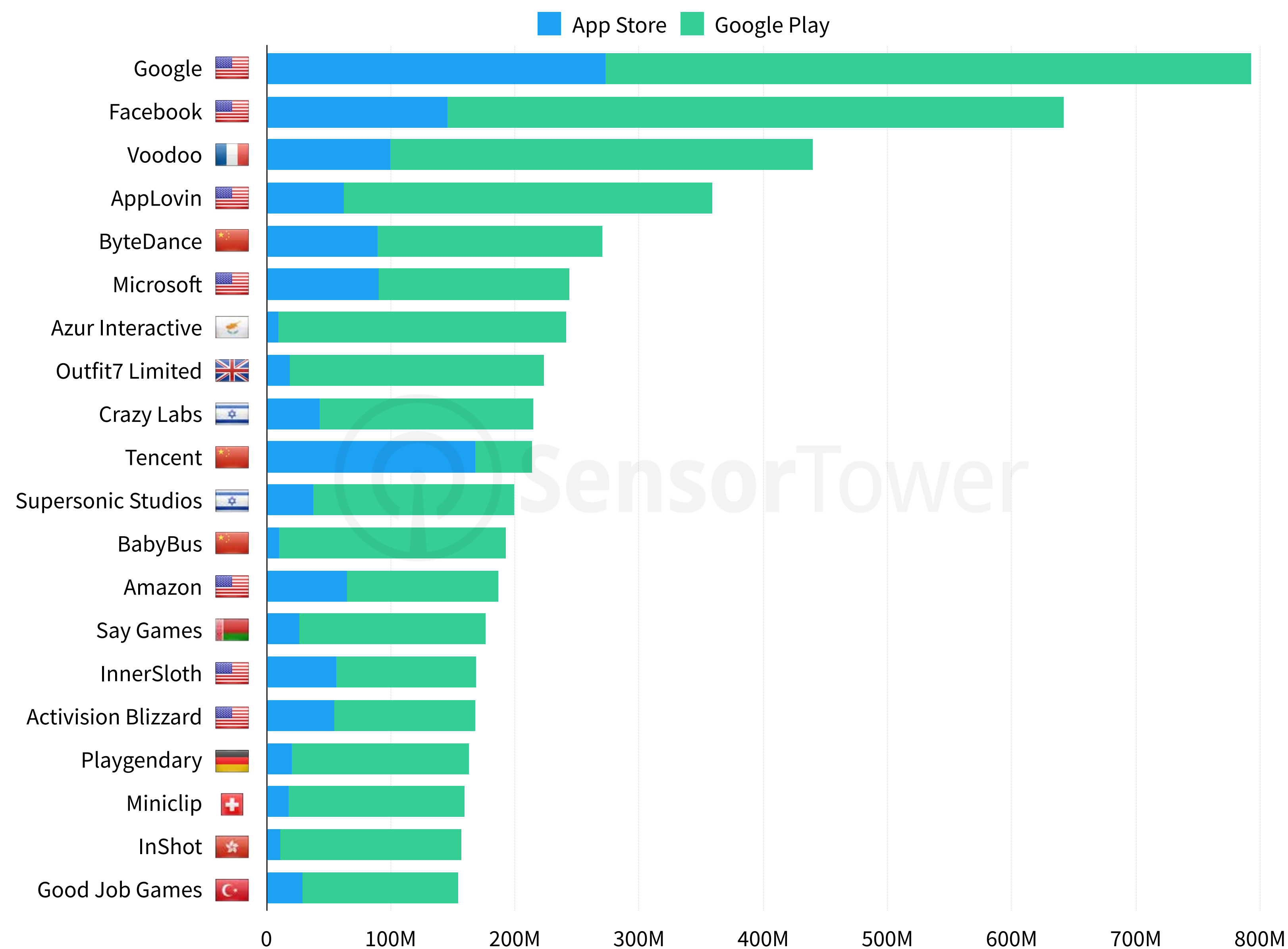
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# Top Publishers

# Overall - Worldwide

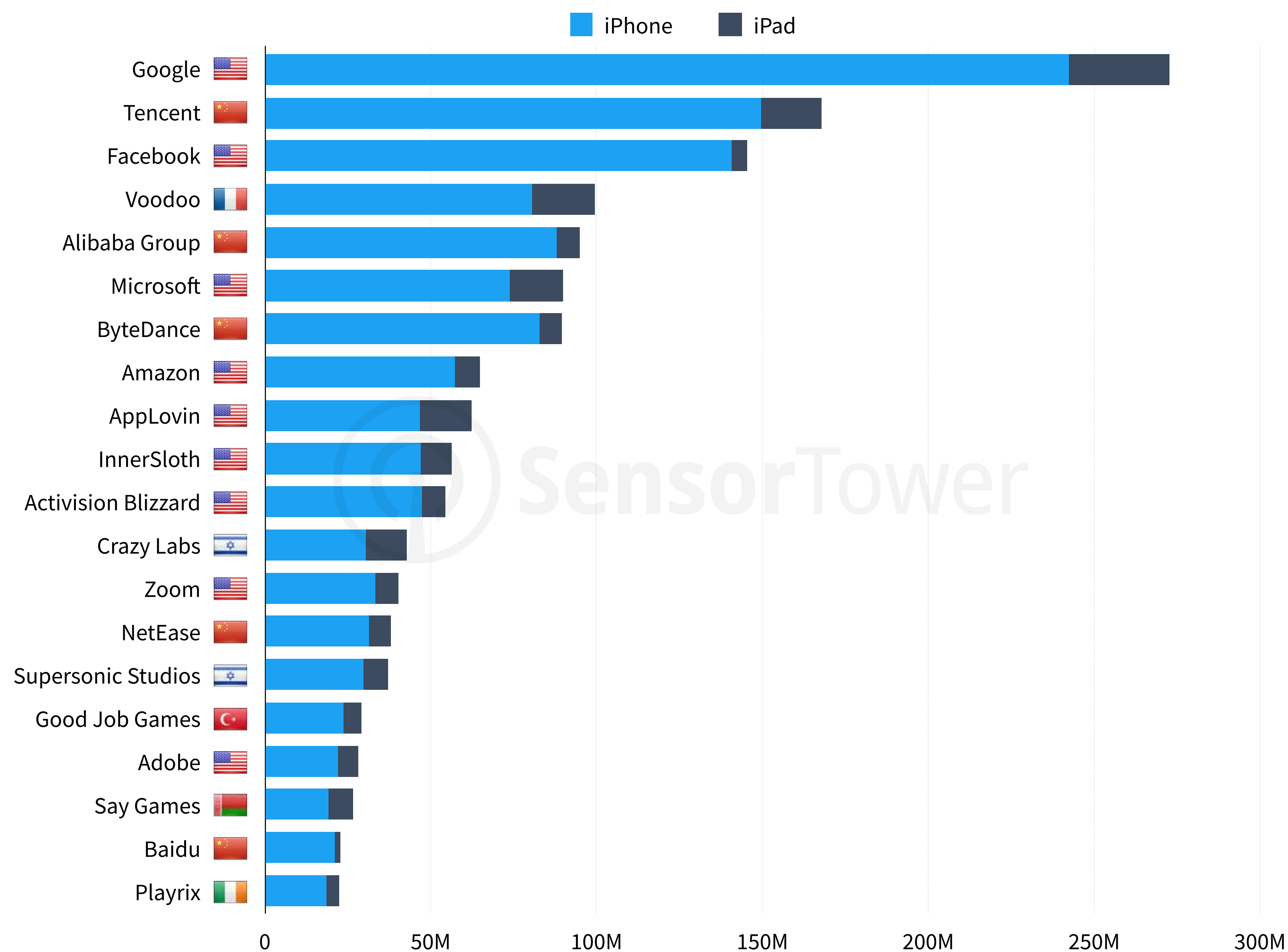


**Google maintained its dominance as the top publisher across the App Store and Google Play for the third consecutive quarter.** This was a notable shift, as Facebook had more downloads than Google each year between 2014 and 2019.

**InnerSloth, publisher of hit game Among Us, entered the top 20 for the first time at No. 15.** Zoom, meanwhile, dropped out of the top 20 after ranking No. 6 in Q2 and No. 18 in Q3 2020.

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# App Store - Worldwide



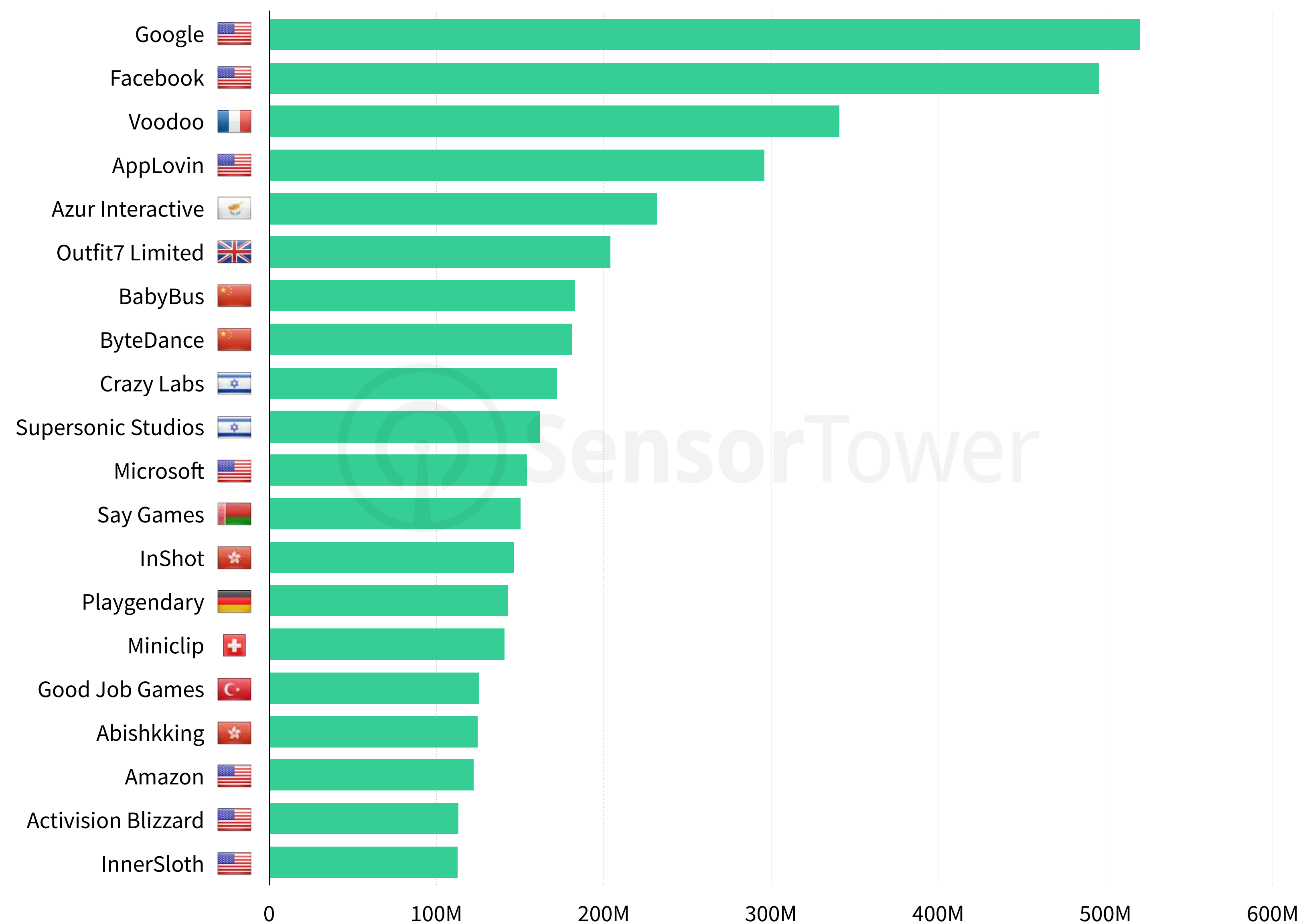
The top three publishers were the same as 3Q20. Alibaba Group replaced ByteDance in the top five.

Nearly all of the top 10 publishers on the App Store were from the U.S. or China, including Google and Facebook from the U.S. and Tencent and ByteDance from China. France-based Voodoo was the one exception among the top 10.

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# Google Play - Worldwide



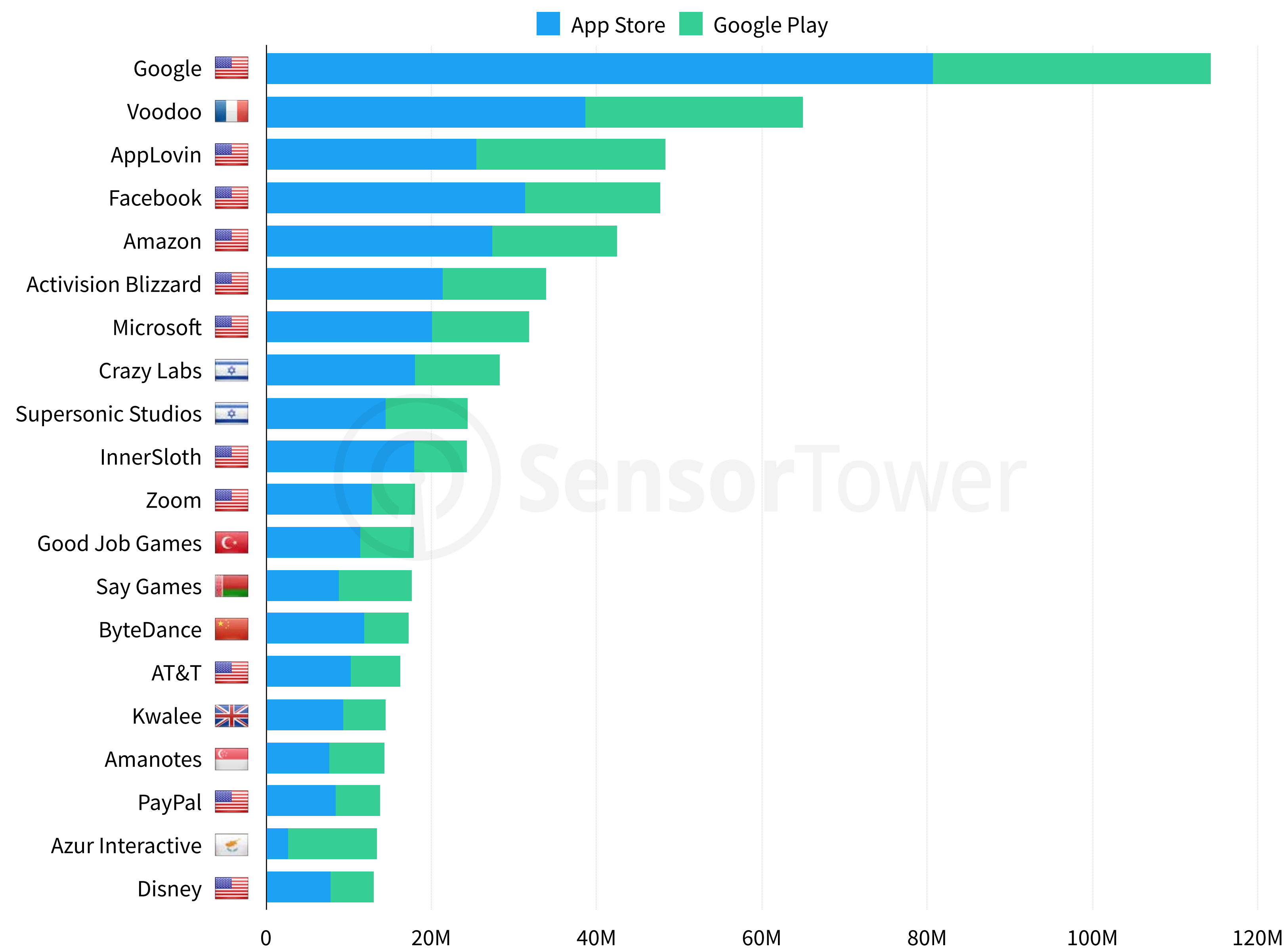
**Google, Facebook, and Voodoo kept the top three spots in Q4 2020.** AppLovin moved up to No. 4 with 32 percent growth from 3Q20.

**Two games studios based in Israel were among the top 10 publishers on Google Play.** Crazy Labs and Supersonic Studios both specialize in hypercasual games.

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# Overall - United States



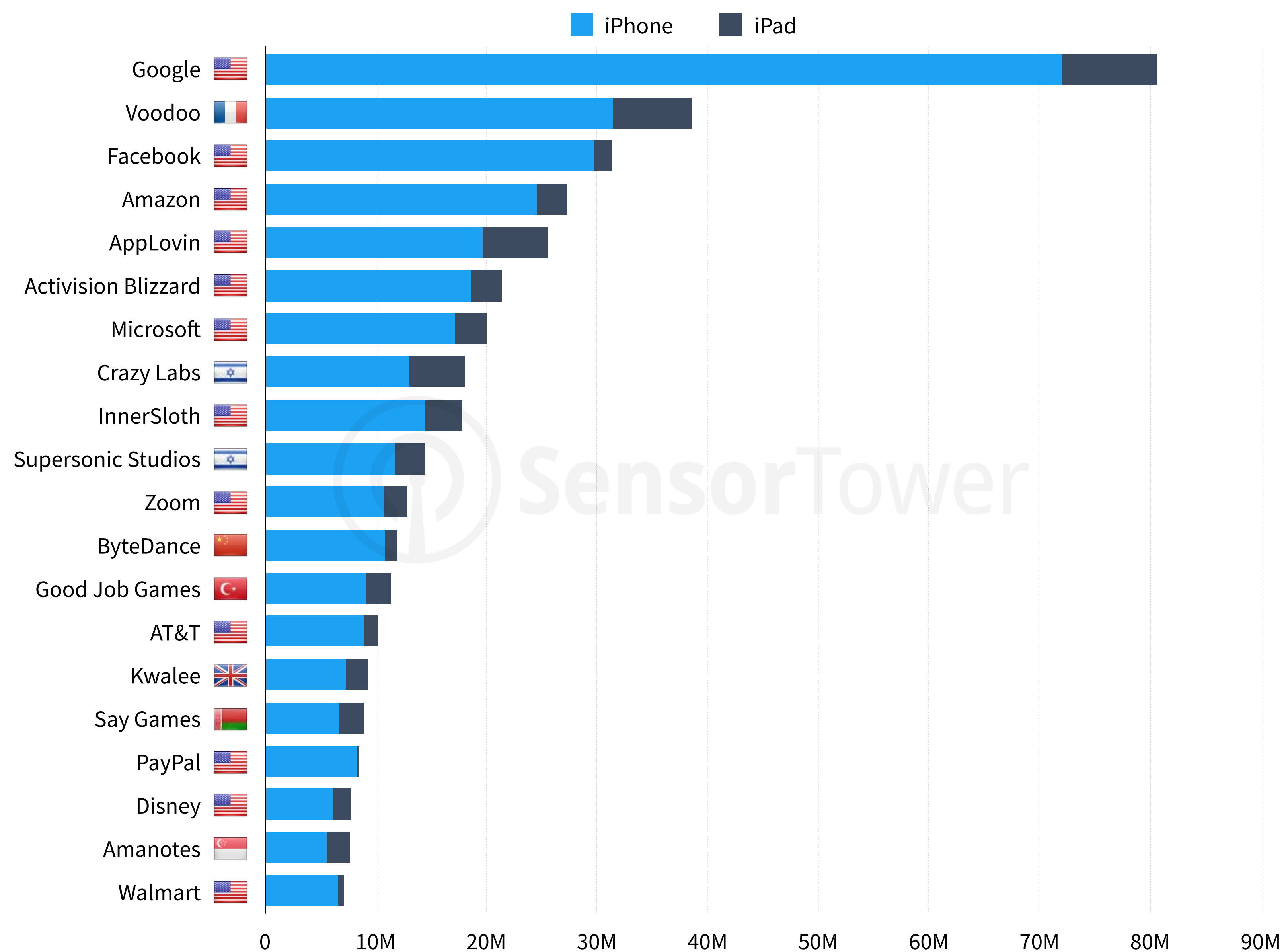
**Google was the top publisher in the U.S. despite having its worst quarter of the year in Q4 2020.** It was far-and-away the top publisher in the U.S. in 2020.

**Few top publishers were from outside of the United States, apart from the many hypercasual games publishers like Voodoo and Crazy Labs.** ByteDance, publisher of TikTok, was a notable exception.

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# App Store - United States



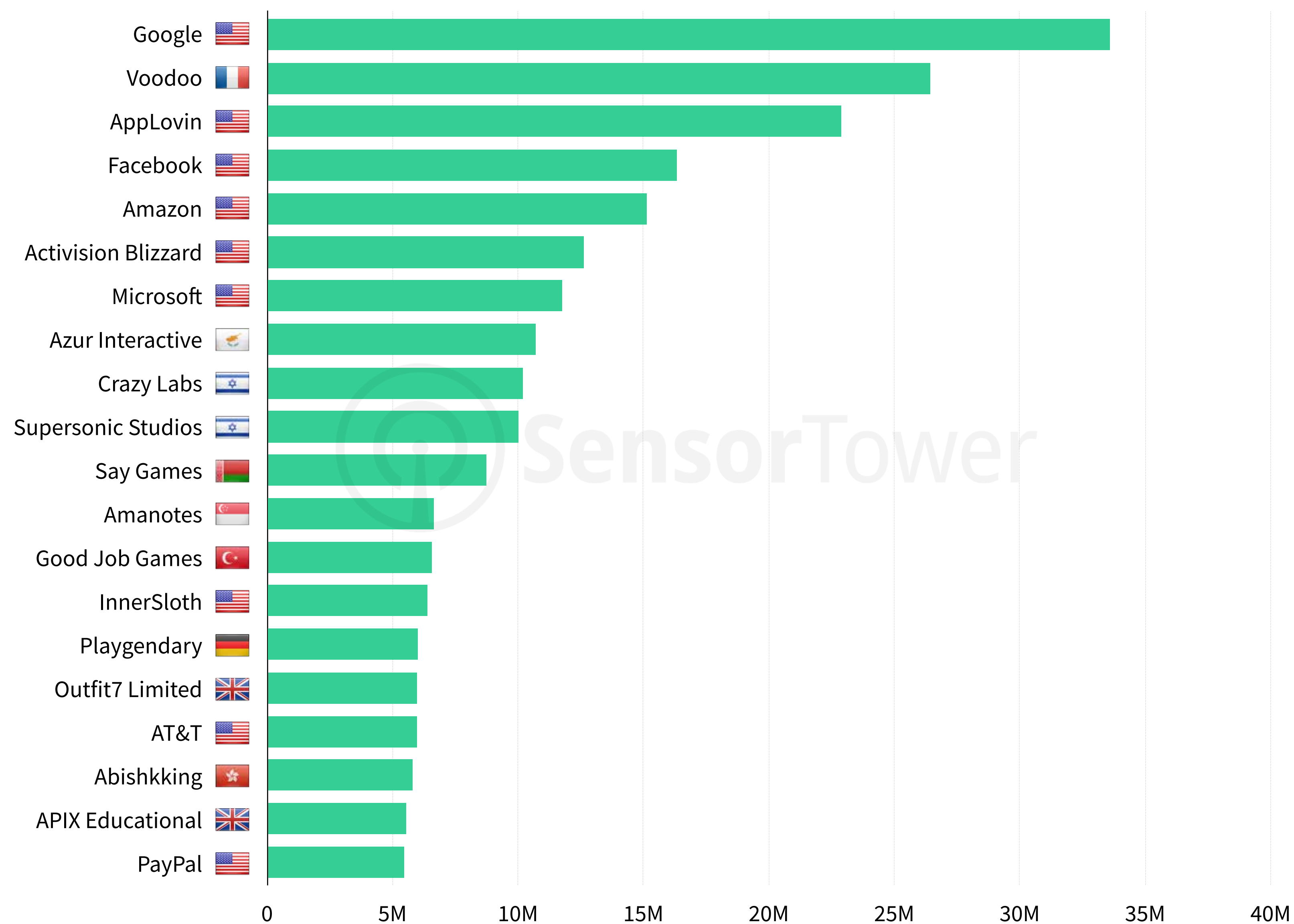
**On the U.S. App Store, the top four publishers remained the same as last quarter.** AppLovin replaced Microsoft among the top five.

**Among Us propelled InnerSloth into the top 10 for the second straight quarter.** It moved up one spot versus Q3 2020.

**Note Regarding Download Estimates**

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# Google Play - United States



Meanwhile, the top five publishers on Google Play all remained the same as in Q3 2020. Activision Blizzard, Azur Interactive, and Supersonic Studios entered the top 10 in Q4 2020.

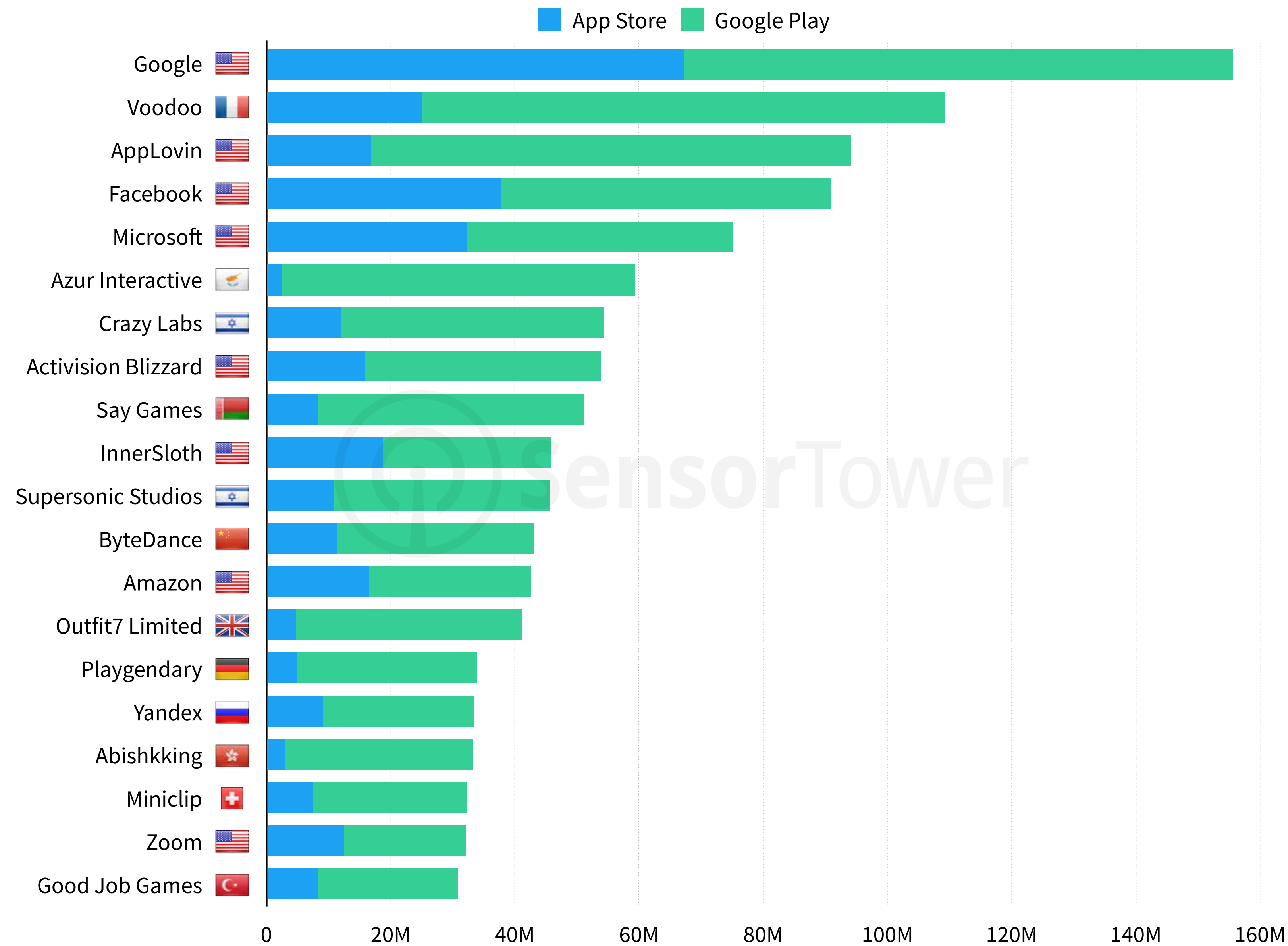
**Top games publishers represented a handful of different countries.** Voodoo (France), AppLovin (the U.S.), Azur Interactive (Cyprus), Crazy Labs (Israel), and Say Games (Belarus) were just a few of the top performers in the quarter.

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# Overall - Europe



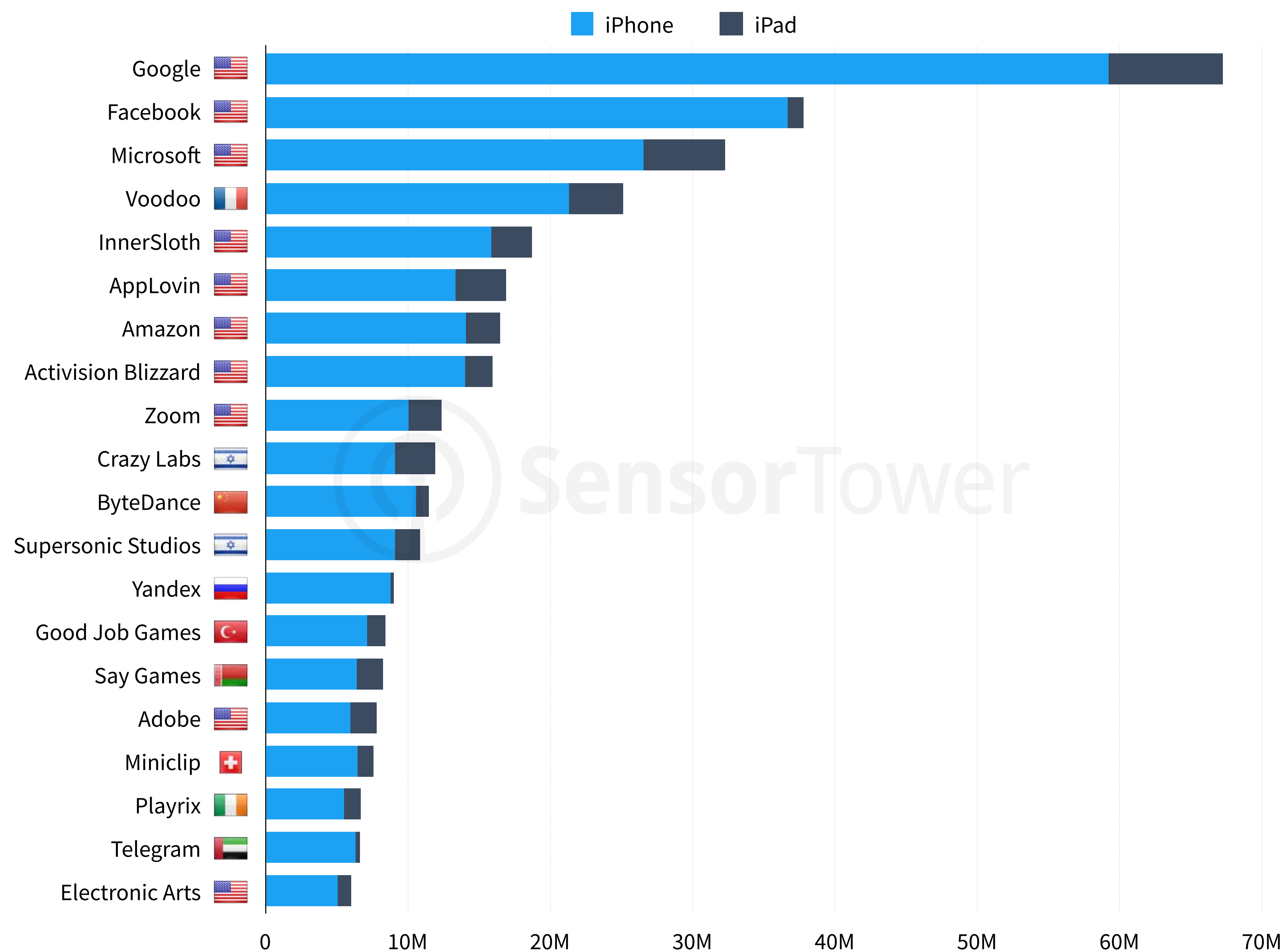
**Facebook dropped out of the top three for the first quarter in 2020, falling to No. 4 in Q4.** AppLovin passed Facebook with its best quarter yet in Europe. The bulk of AppLovin’s downloads came from its games publisher Lion Studios.

**U.S.-based publishers had a good quarter in Europe.** InnerSloth entered the top 20 at No. 10, and Zoom returned to the top 20 after falling outside the top list in Q3 2020.

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# App Store - Europe



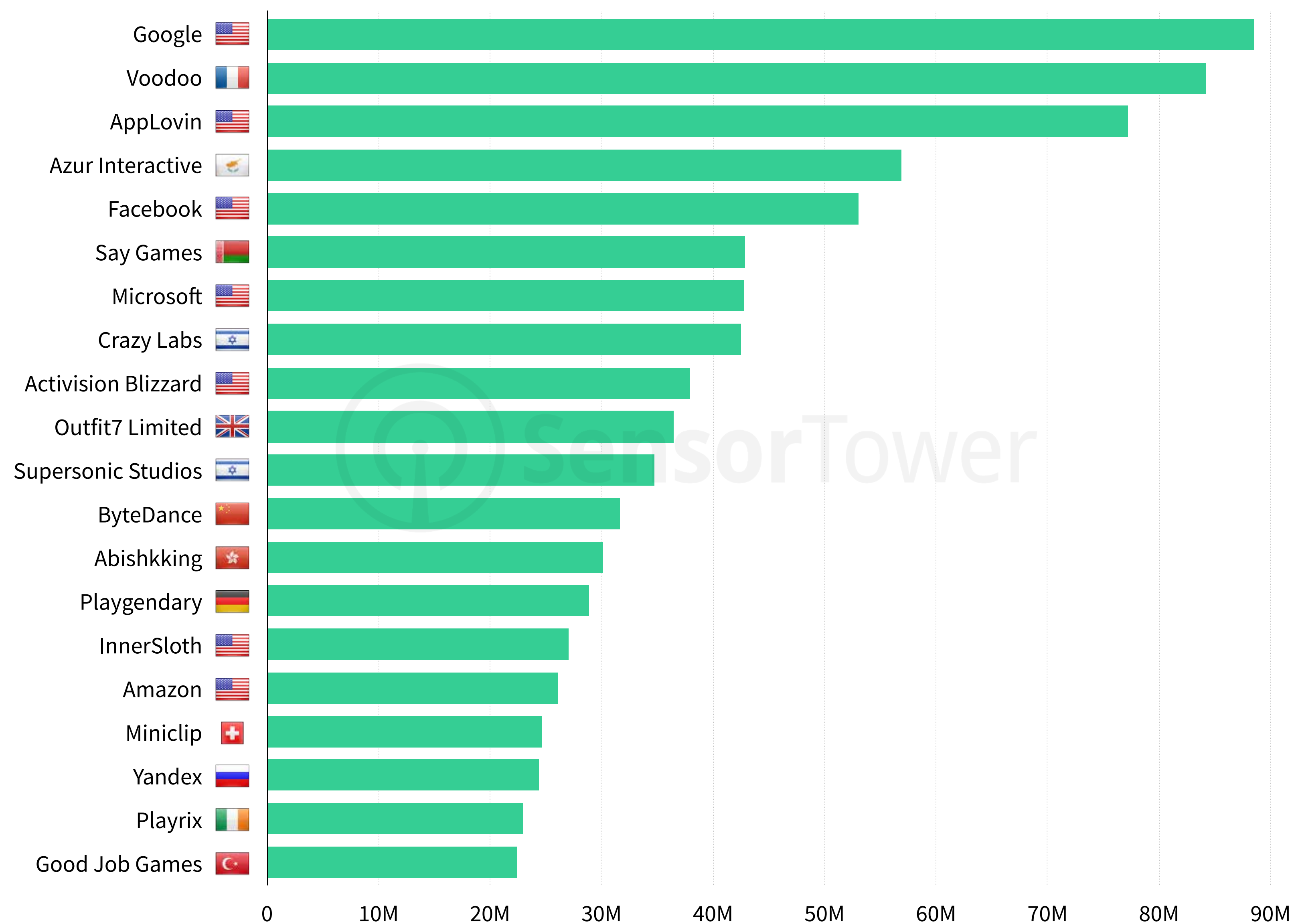
**Google was the top publisher again in Europe, with 67 million App Store downloads in the region.** This was an all-time high and up 25 percent Y/Y.

**Telegram made the top 20 for the first time this year with more than 6.5 million installs in Q4 2020.** Its messaging app was most popular in Russia, which contributed 38 percent of its European downloads.

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# Google Play - Europe



**Voodoo’s Google Play downloads in Europe peaked in Q3 2020 at 99 million.** It followed that up with a strong quarter in Q4 with nearly 85 million installs, good enough to rank No. 2 behind Google.

**Azur Interactive ended 2020 with its best quarter yet, up 62 percent from its previous high from Q3 2020.** Its top games in the quarter included Stack Ball, Do Not Fall.io, and Harvest.io.

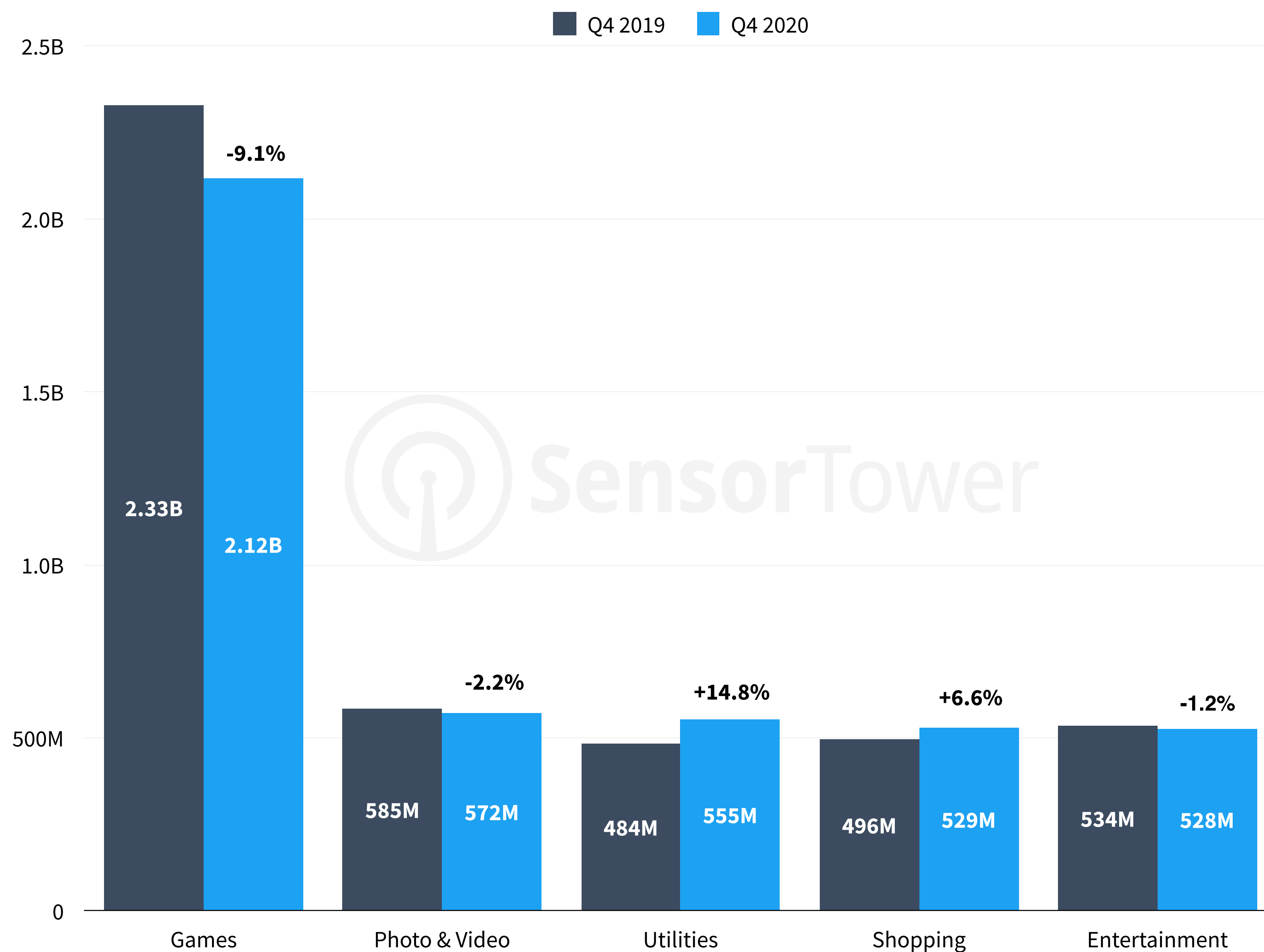
### Note Regarding Download Estimates

Our estimates include worldwide daily download totals for Google Play for Oct. 1 through Dec. 31, 2020. 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 downloads fell 9.1 percent Y/Y, with China contributing most of the decline.**

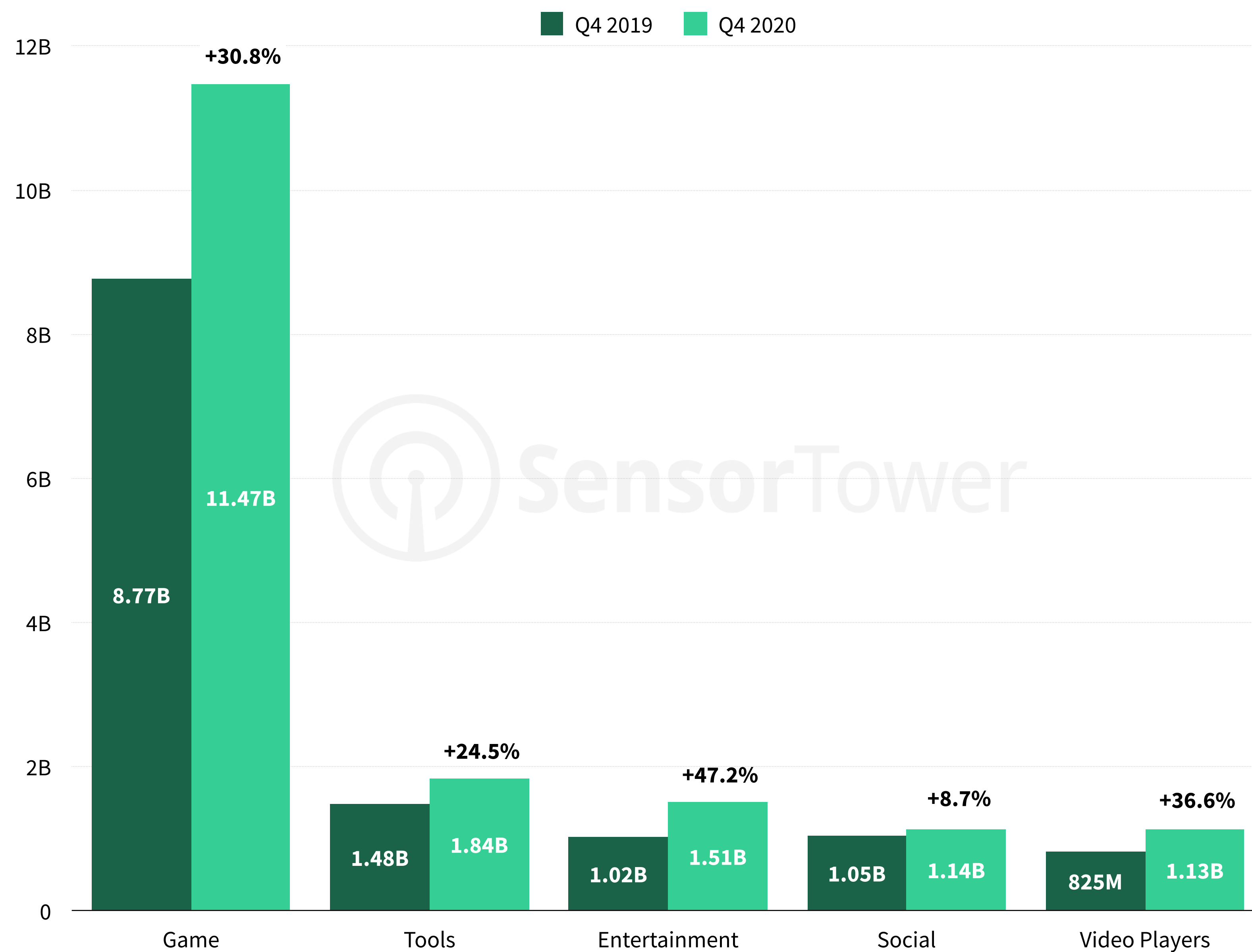
After downloads in China reached 743 million in Q1 2020 amid the spread of COVID-19, its 302 million in Q4 2020 was its lowest total in eight years.

**Utilities and Shopping each passed Entertainment to rank as the No. 3 and 4 categories, respectively.** Utilities in particular had strong growth of 14.8 percent year-over-year.

**Note Regarding Download Estimates**

Our estimates include worldwide daily download totals for iPhone and iPad for Oct. 1 through Dec. 31, 2020. Apple apps are excluded. We report unique installs only (one download per User).

# Google Play



**While games struggled on the App Store, Google Play observed a very different trend.** Game downloads surpassed 11 billion on Google Play for the third straight quarter.

**The rest of the top five categories kept the same order as in Q3 2020.** Entertainment and Video Players had particularly high year-over-year growth.

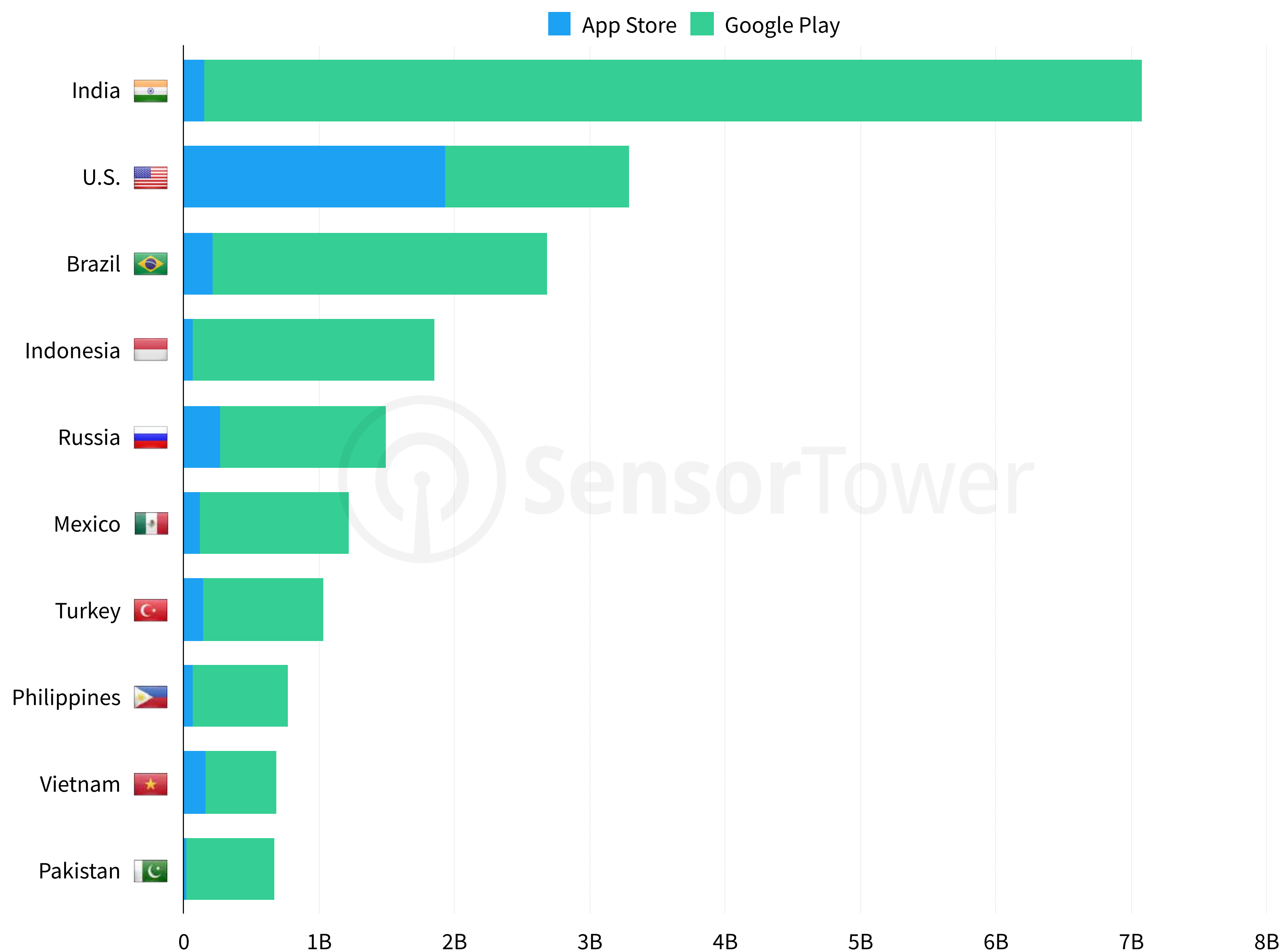
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# Top Countries

# Overall



**India had its second best quarter to date behind Q3 2020, surpassing 7 billion downloads for the second time.** This was an increase of 44.5 percent Y/Y from its 4.9 billion downloads in Q4 2019.

**Pakistan entered the top 10 for the first time in 2020 off of 59 percent Y/Y growth.** 97.3 percent of its downloads were from Google Play, with the App Store taking the remaining 2.7 percent.

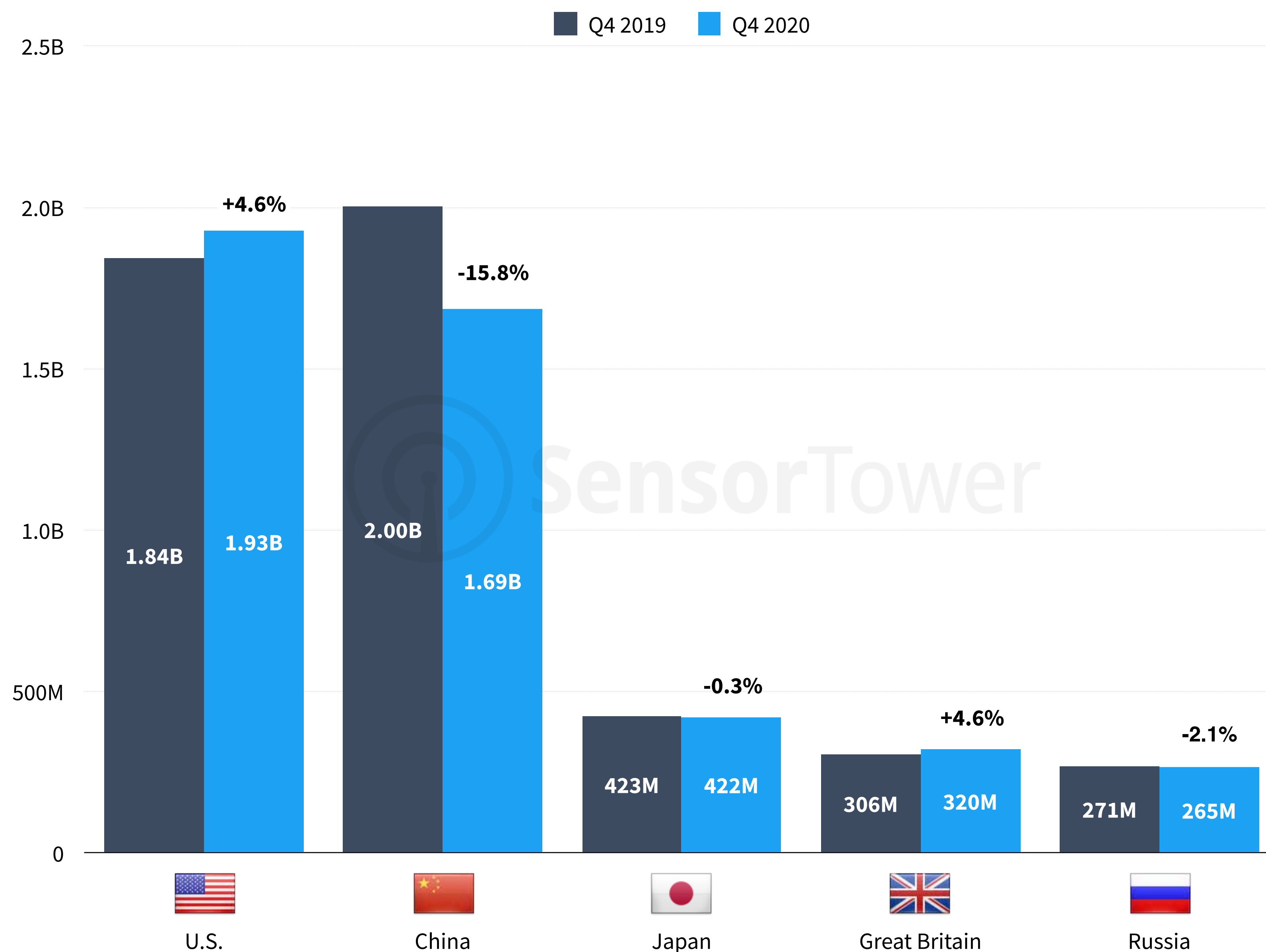
**Note Regarding Download Estimates**

Our estimates include worldwide daily download totals for iPhone and iPad for Oct. 1 through Dec. 31, 2020. 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



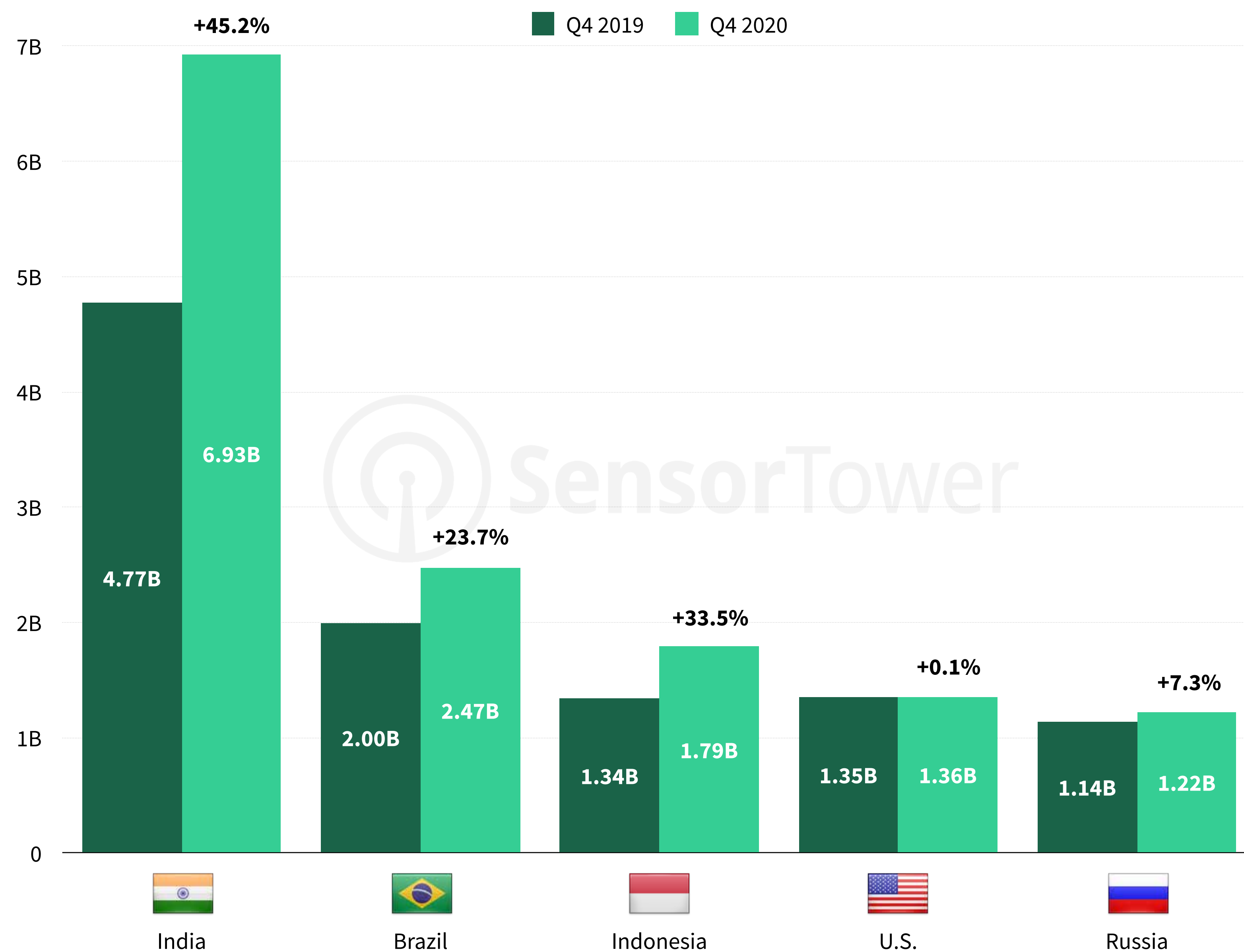
**The U.S. passed China to take the top spot on the App Store in Q4 2020 for the third consecutive quarter.** The last three quarters were the only ones where the U.S. had more downloads than China since 2015.

**China's App Store downloads declined for the second straight quarter, reaching their lowest total since Q2 2015.** However, its downloads only fell by 0.6 percent Y/Y in 2020 because of a strong first quarter to the year.

### Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Oct. 1 through Dec. 31, 2020. Apple apps are excluded. We report unique installs only (one download per User).

# Google Play



**India alone contributed 36 percent of the total Y/Y growth on Google Play in Q4 2020, with its downloads climbing by more than 2 billion.** India contributed more than a quarter of the platform's installs in Q4 2020, up from 22 percent a year prior.

**Brazil and Indonesia also saw strong growth in Q4 2020.** Indonesia passed the U.S. and expanded the gap in 2020.

### Note Regarding Download Estimates

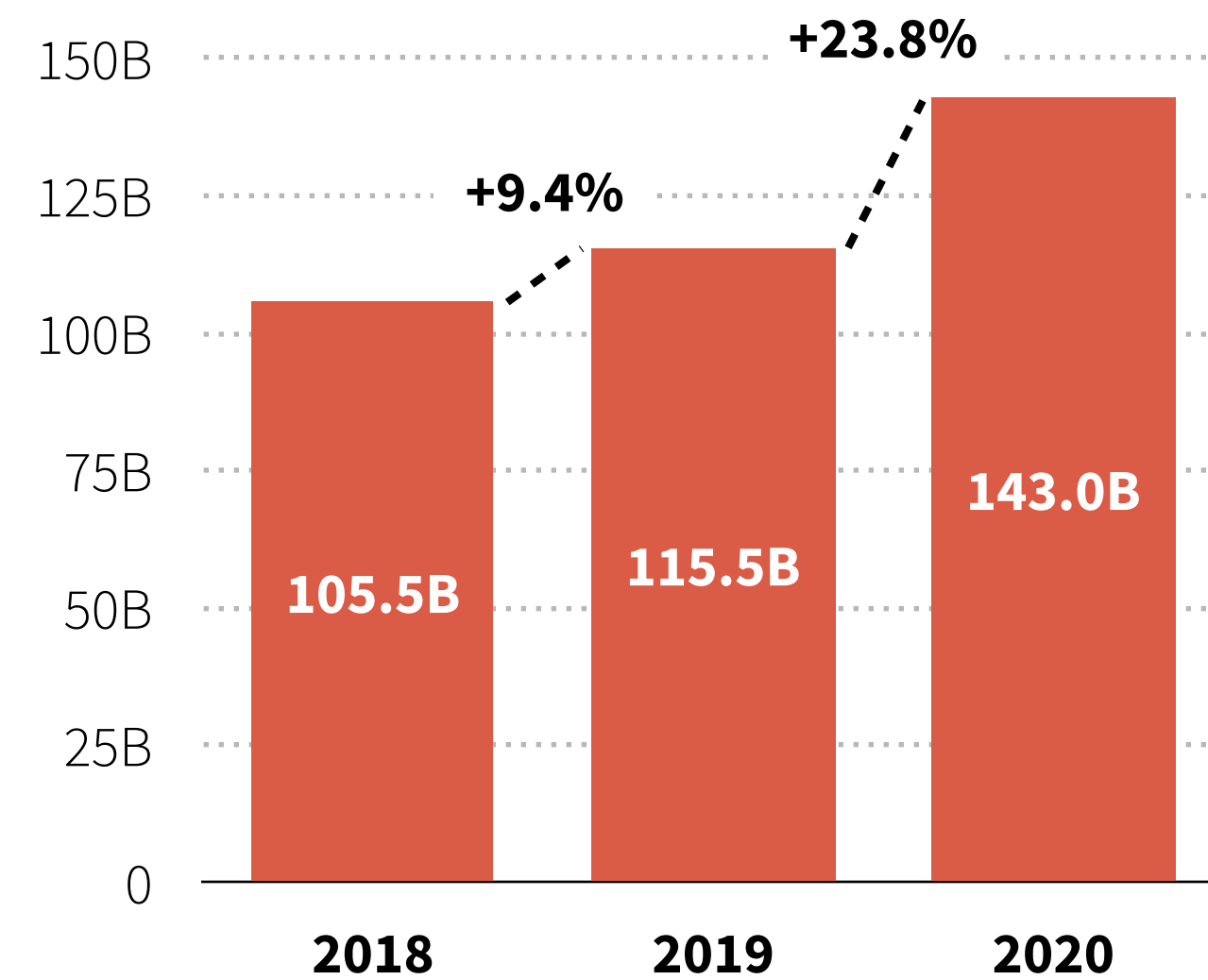
Our estimates include worldwide daily download totals for Google Play for Oct. 1 through Dec. 31, 2020. We report unique installs only (one download per User). Google preinstalled apps are excluded. Android download estimates do not include third-party stores. Figures represent aggregate installs of all app versions, ex: Facebook and Facebook Lite.

A person's hands are shown holding a smartphone over a desk. On the desk, there is a clipboard with a pen and some papers. The scene is dimly lit, and the overall tone is professional and focused.

# 2020 Year in Review

# Market Overview: 2020 Worldwide Download Growth

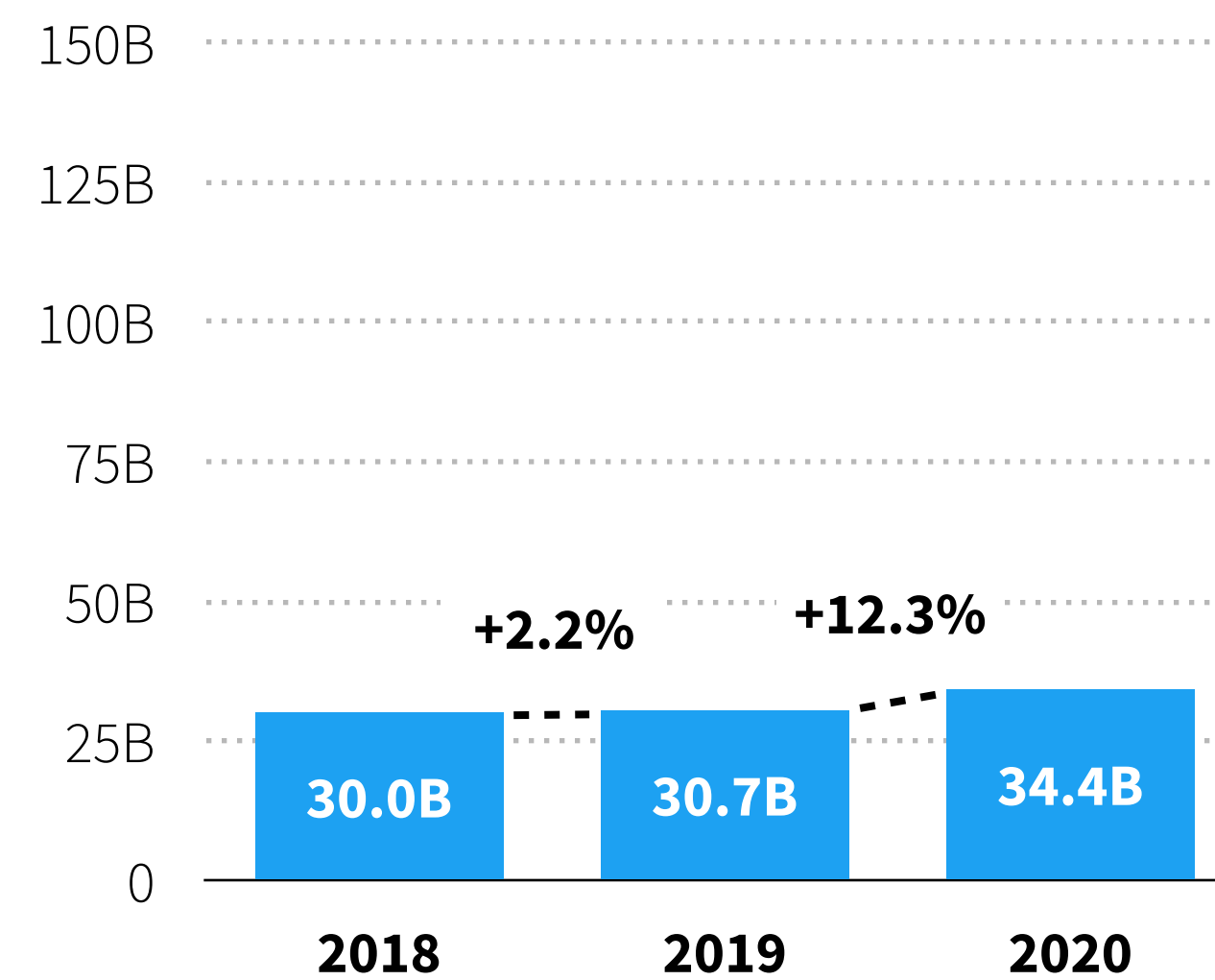
### Worldwide App Store and Google Play Downloads



143 Billion

App Store + Google Play Downloads

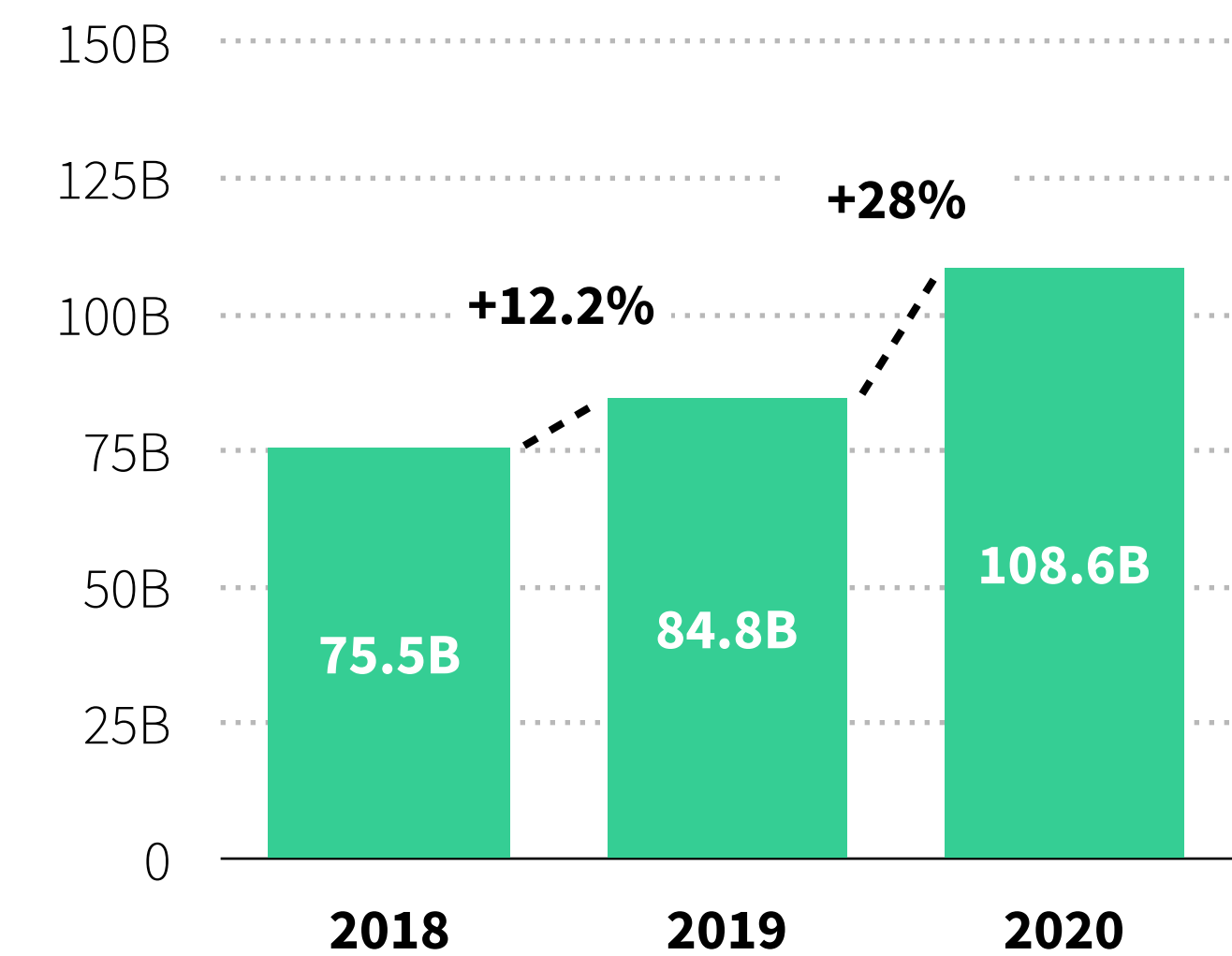
### Worldwide App Store Downloads



34.4 Billion

App Store Downloads

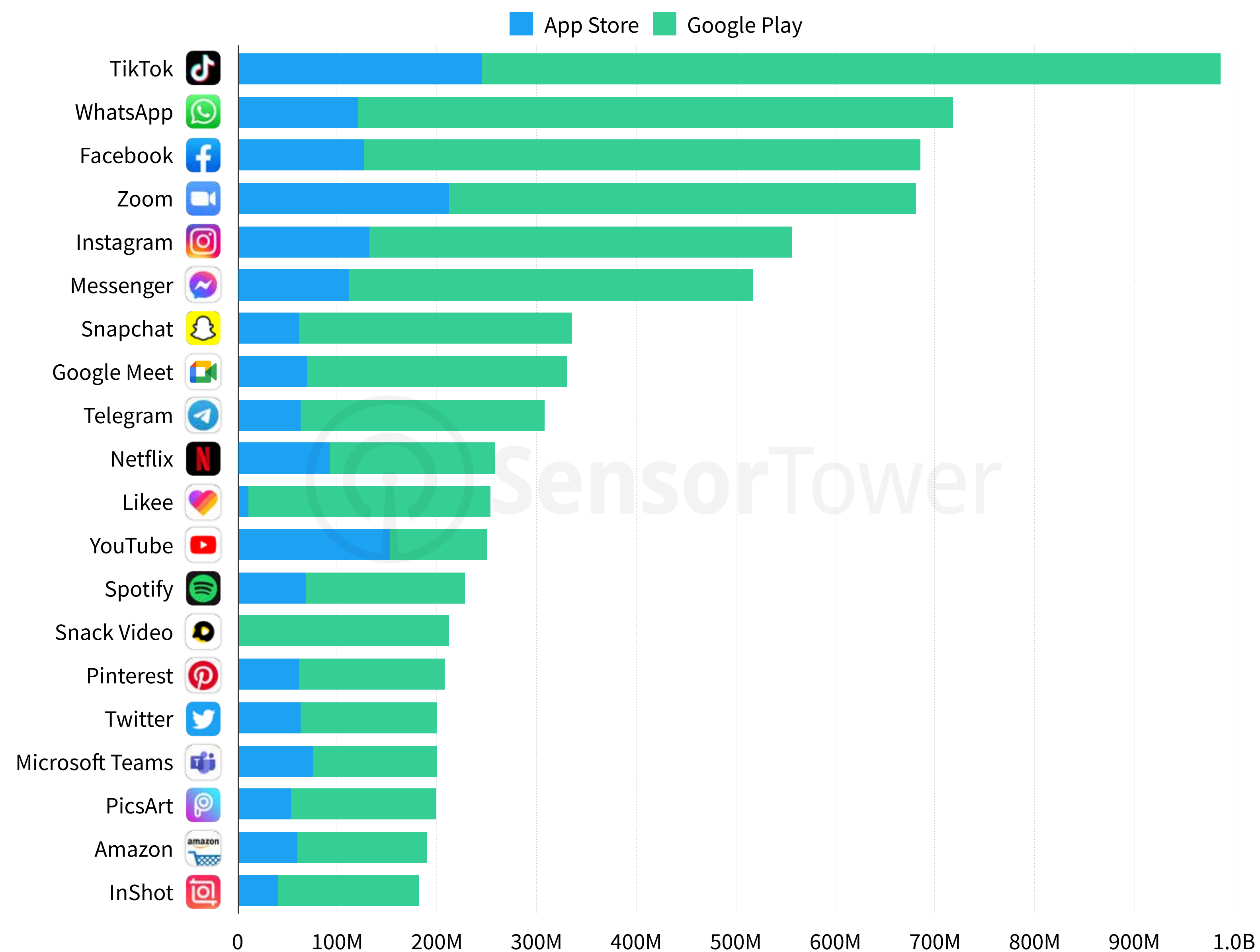
### Worldwide Google Play Downloads



108.6 Billion

Google Play Downloads

# Top Apps



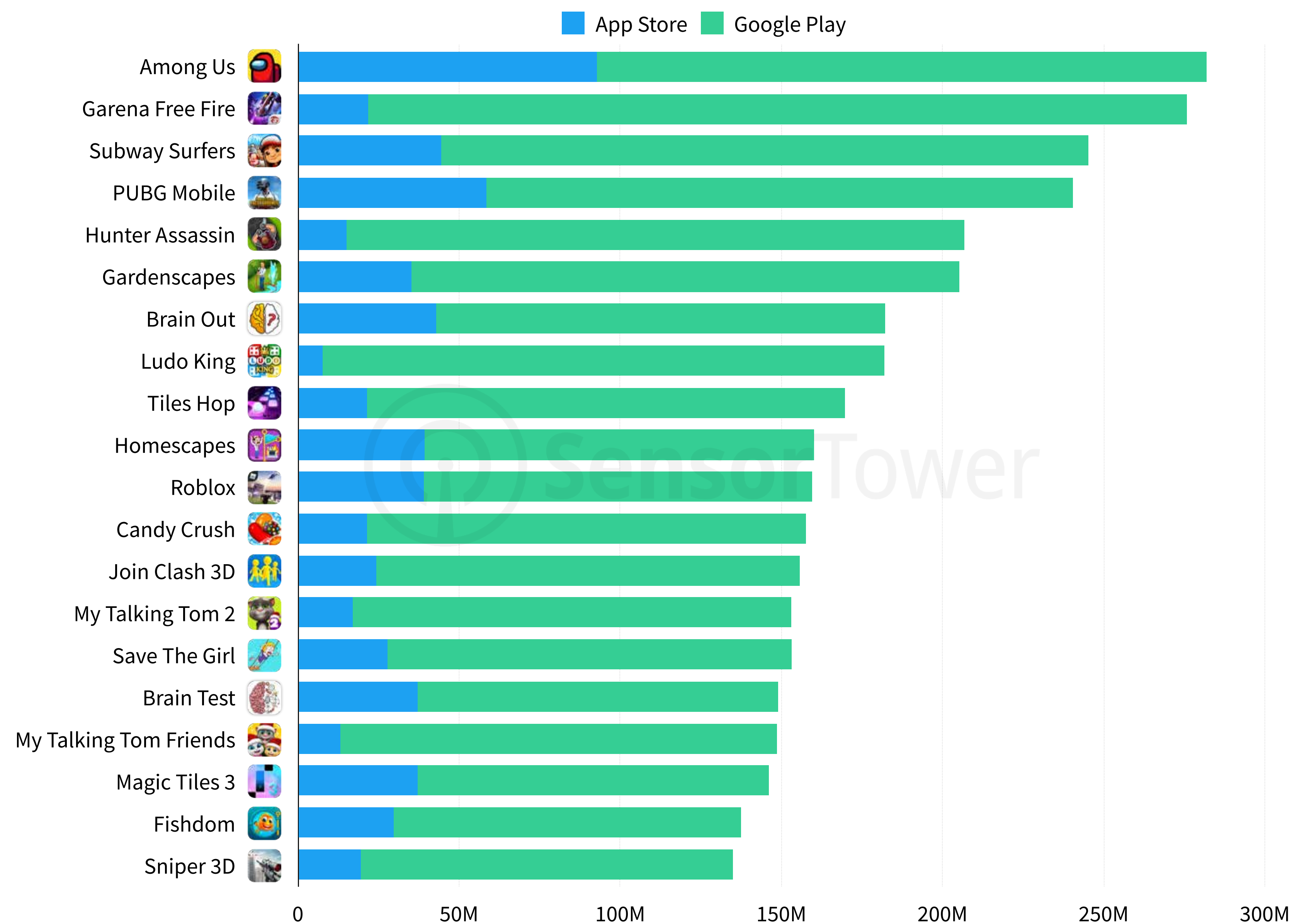
**TikTok’s meteoric rise resulted in it taking the top spot in 2020, surpassing WhatsApp, the top app in 2019.** TikTok had nearly 987 million downloads in 2020, an increase of 37 percent Y/Y.

**Zoom was a new entrant to the top list, ranking at No. 4 in 2020.** Zoom’s popularity soared following office and school closures during the pandemic, and its downloads grew nearly 25x Y/Y.

**Note Regarding Download Estimates**

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1 through Dec. 31, 2020. 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



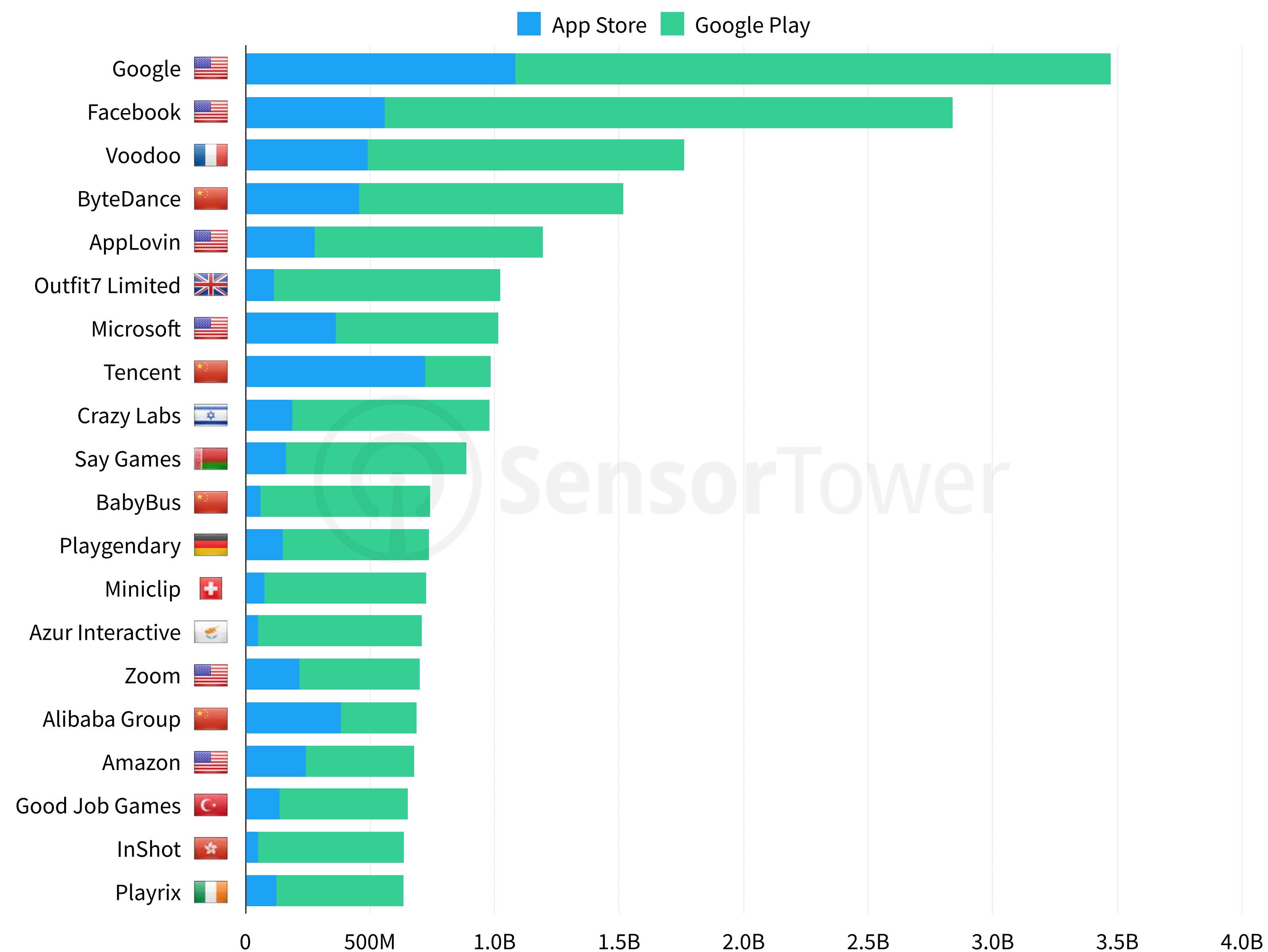
**Among Us emerged as the top mobile game in 2020 with 282 million downloads across the App Store and Google Play.** It only had 14.5 million all-time downloads entering 2020 before it became a viral hit in the second half of the year.

**The No. 2 and 3 games were the same as in 2019, with Garena Free Fire and Subway Surfers rounding out the top 3.** PUBG Mobile from Tencent, the top game in 2019, fell to No. 4 this year.

### Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1 through Dec. 31, 2020. 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



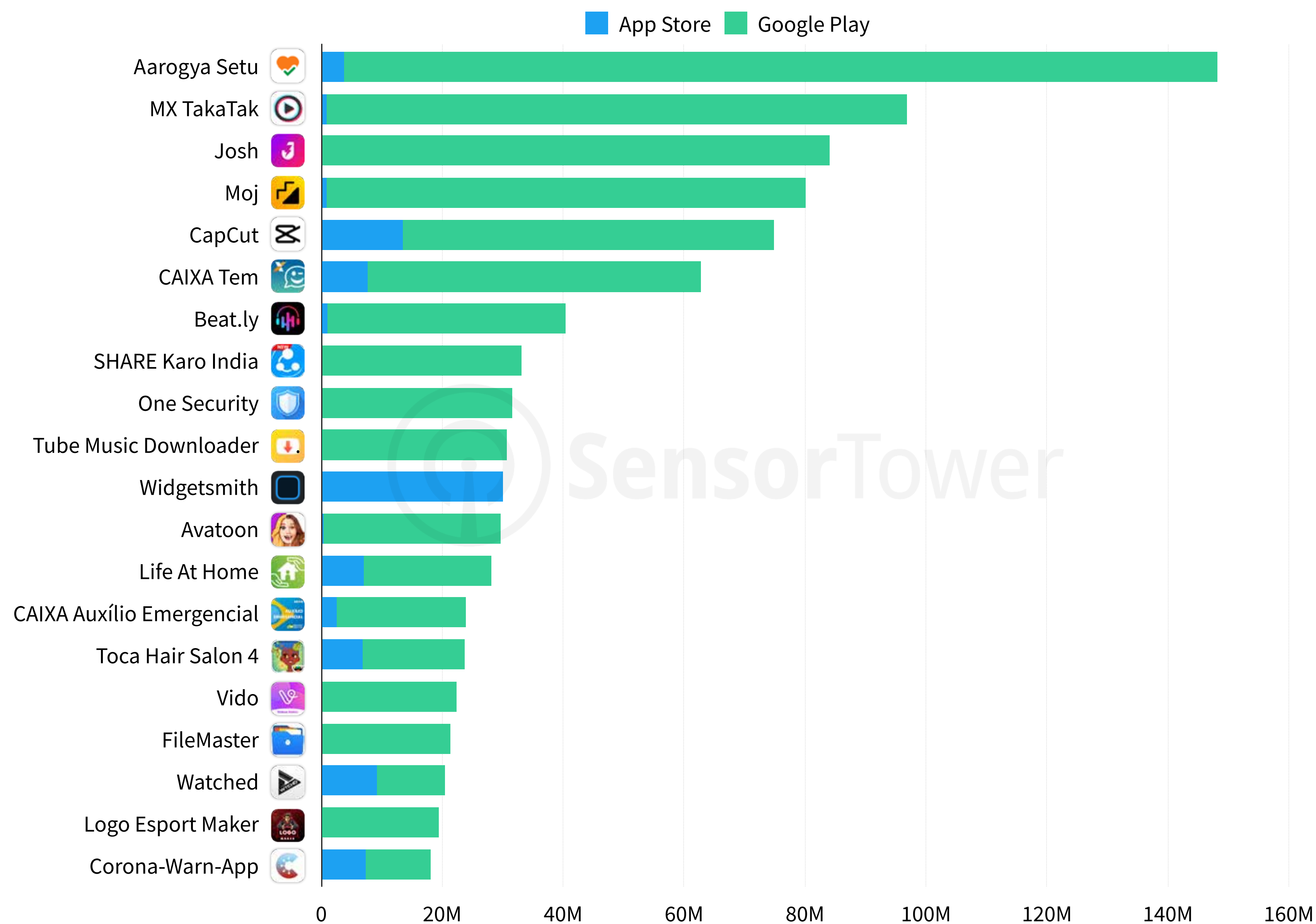
**Google passed Facebook to become the top publisher for the first time.** Facebook had held the top spot for at least the past six years, with Google ranking as the No. 2 publisher each year.

**The success of business apps in 2020 helped Microsoft move up from No. 14 in 2019 to No. 7 in 2020.** Microsoft's downloads grew 69 percent Y/Y, led by chat and video conferencing app Microsoft Teams at nearly 200 million installs in 2020.

**Note Regarding Download Estimates**

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1 through Dec. 31, 2020. 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



**Aarogya Setu, a COVID-19 contact tracing app in India, was the top new app launched in 2020.** Its 148 million installs were well above the next app, MX TakaTak.

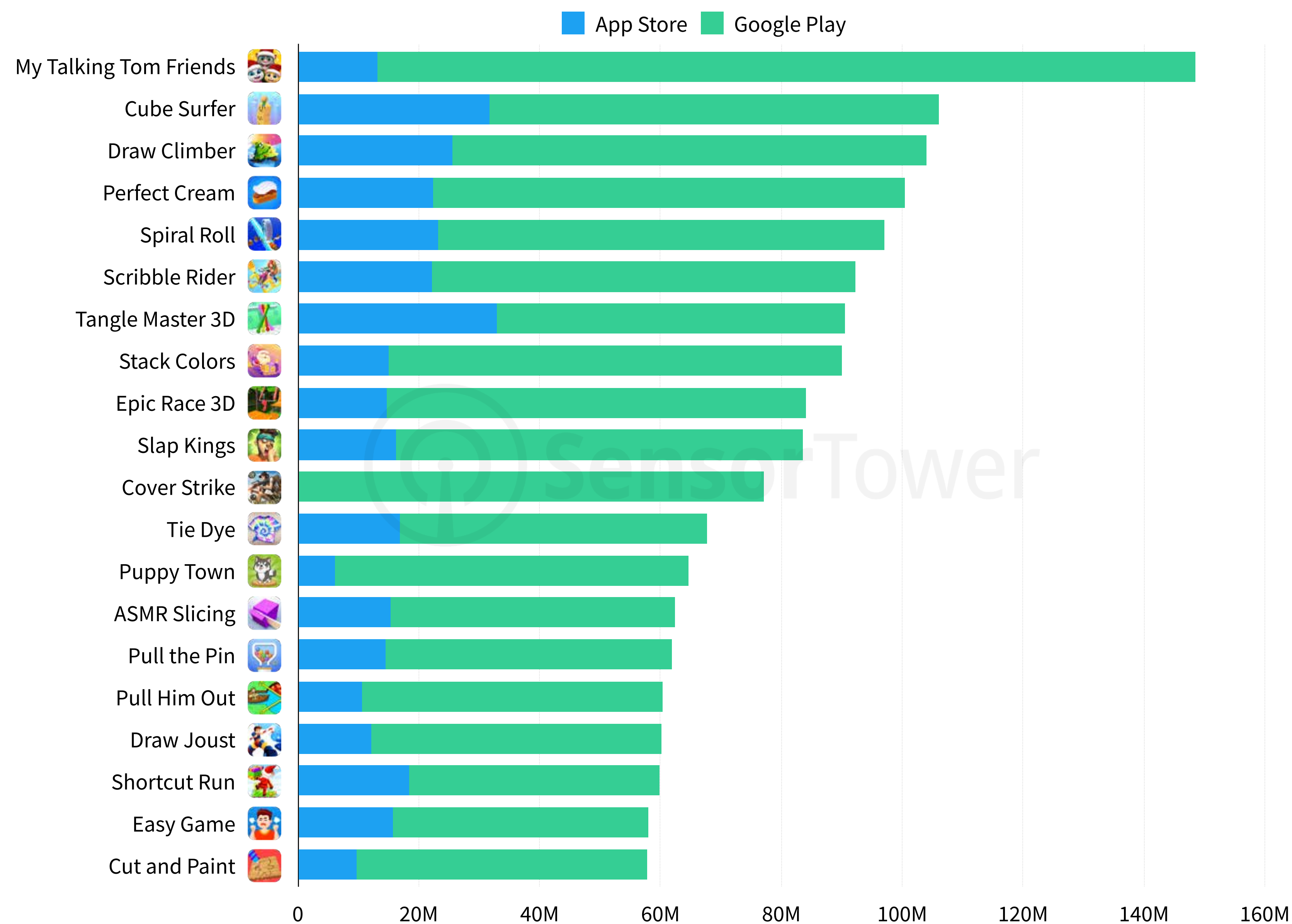
**The next three new apps also received nearly all of their downloads from India.** MX TakaTak, Josh, and Moj launched as “made in India” alternatives to TikTok following the Chinese app’s ban.

### Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1 through Dec. 31, 2020. 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



**Among hypercasual games, My Talking Tom Friends from Outfit7 Limited emerged as the top new game in 2020.** It had nearly 37 million downloads in June alone following its launch earlier that month.

**No new games reached 150 million installs in 2020 after six new games achieved that milestone in 2019.** One notable trend in 2020 was a drop in hypercasual game installs, particularly among the top games, as commuting was reduced due to COVID-19.

### Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1 through Dec. 31, 2020. 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.



# Stories of the Year

# Stories of the Year:

## 1. Rise of Remote Work

The spread of COVID-19 in early 2020 transformed the app space. No category felt the impact more than **business** apps, as consumers looked for new tools to help them adjust to working from home. **Zoom** was the biggest riser of 2020, leading the charge from top video conferencing apps.

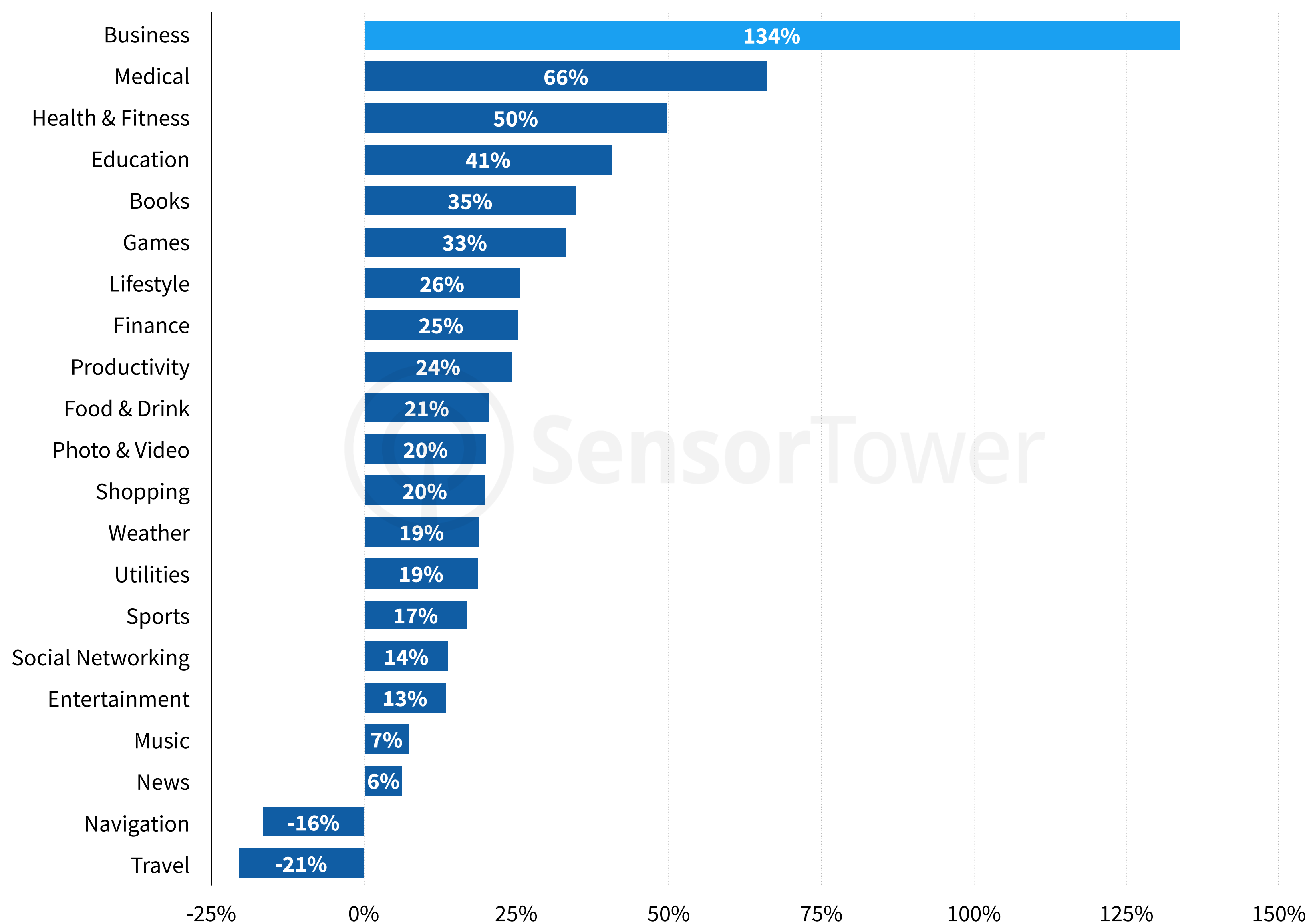
- **Worldwide Business app downloads grew 134 percent Y/Y in 2020** across the App Store and Google Play, more than double the growth of any other category.
- **Zoom's 681M downloads in 2020 ranked it No. 4**, only behind TikTok from ByteDance and Facebook's WhatsApp and Facebook.
- Between 2016 and 2019, no Business apps ever achieved 100M downloads in a year. **Four apps surpassed 160M in 2020, including Zoom, Google Meet, Microsoft Teams, and WhatsApp Business.**



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# Category Growth in 2020



**Most app categories experienced strong growth following the spread of COVID-19, led by Business apps at 134 percent Y/Y.**

Medical was second at 66 percent, followed by Health & Fitness and Education which benefitted from gym and school closures.

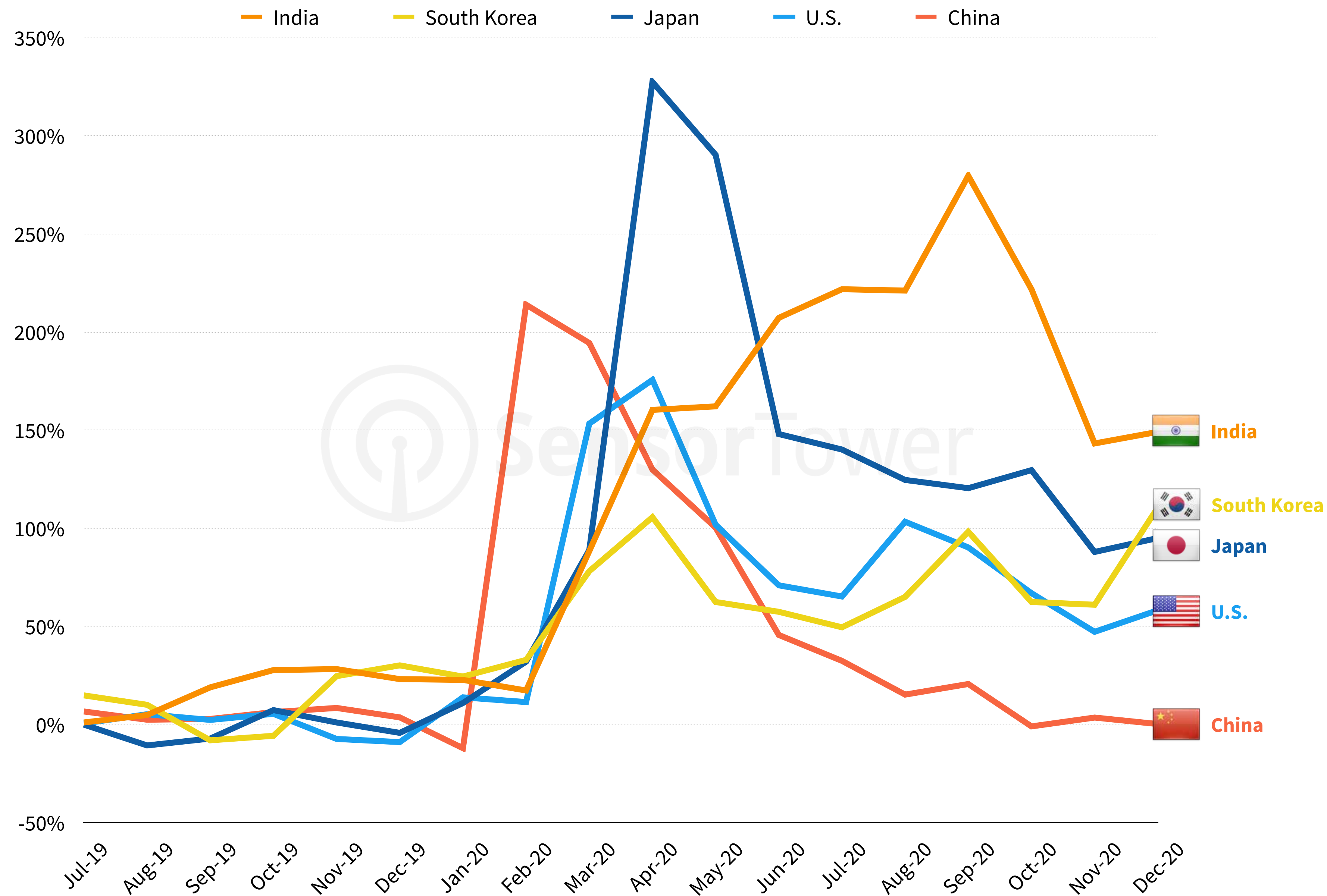
**Only two categories saw downloads decline in 2020, Travel and Navigation.**

This reflected the impact of lockdowns and stay-at-home orders as countries attempted to limit the spread of COVID-19.

**Note Regarding Download Estimates**

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1, 2019 through Dec. 31, 2020. 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.

# Business Download Growth



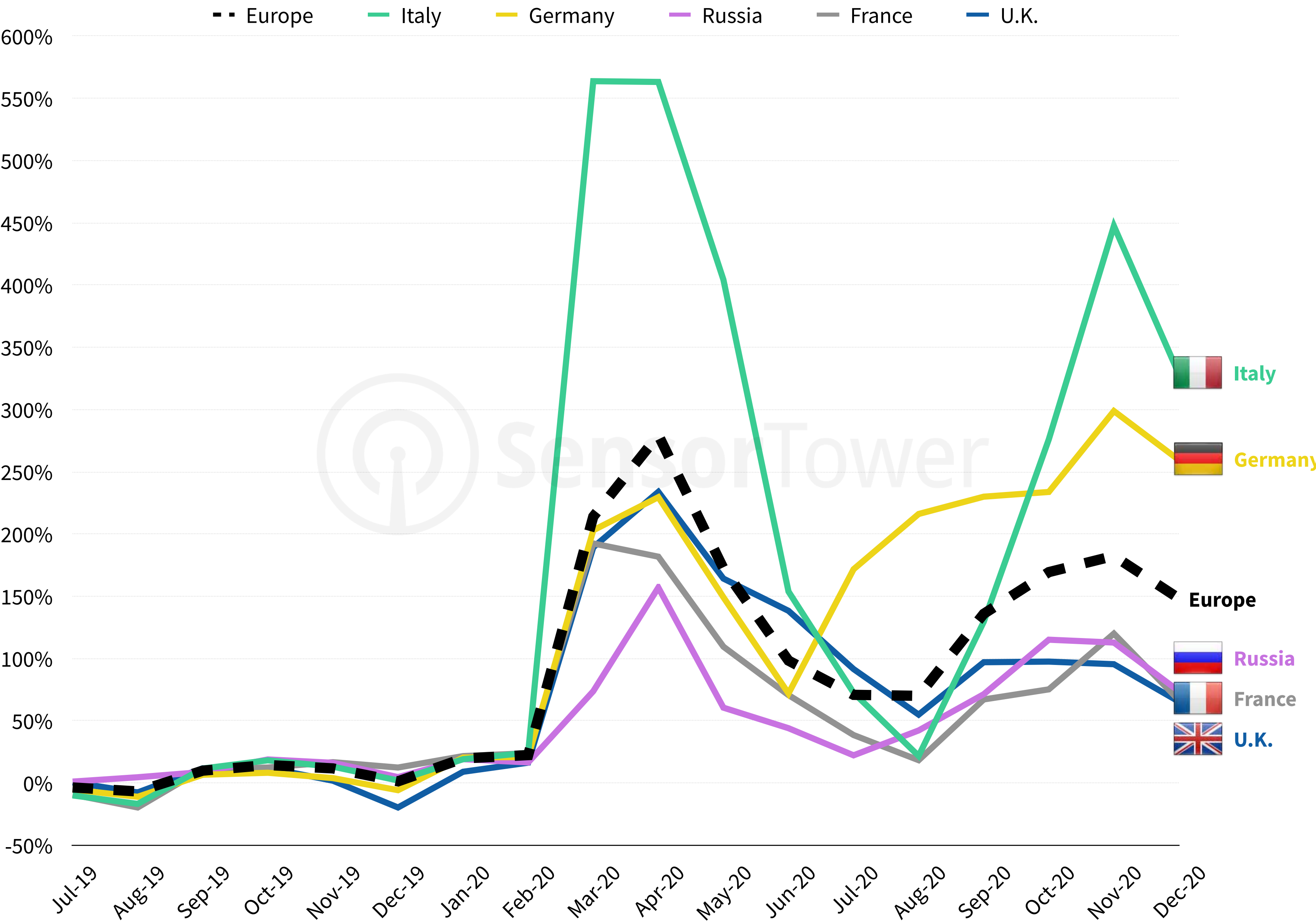
**The effects of COVID-19 varied significantly by county.** China, the first country to experience COVID-19, saw a surge in business app downloads in February. By October, however, business app downloads were back near pre-pandemic levels.

**Business app downloads in other large markets stayed high throughout 2020.** Expect demand to remain elevated until countries gain more control of the pandemic and begin to re-open offices.

**Note Regarding Growth Estimates**

Growth for each country is calculated vs. the country's average monthly downloads for the category in 2019. China data is App Store only, while all other countries include App Store and Google Play.

# Business Growth in Europe

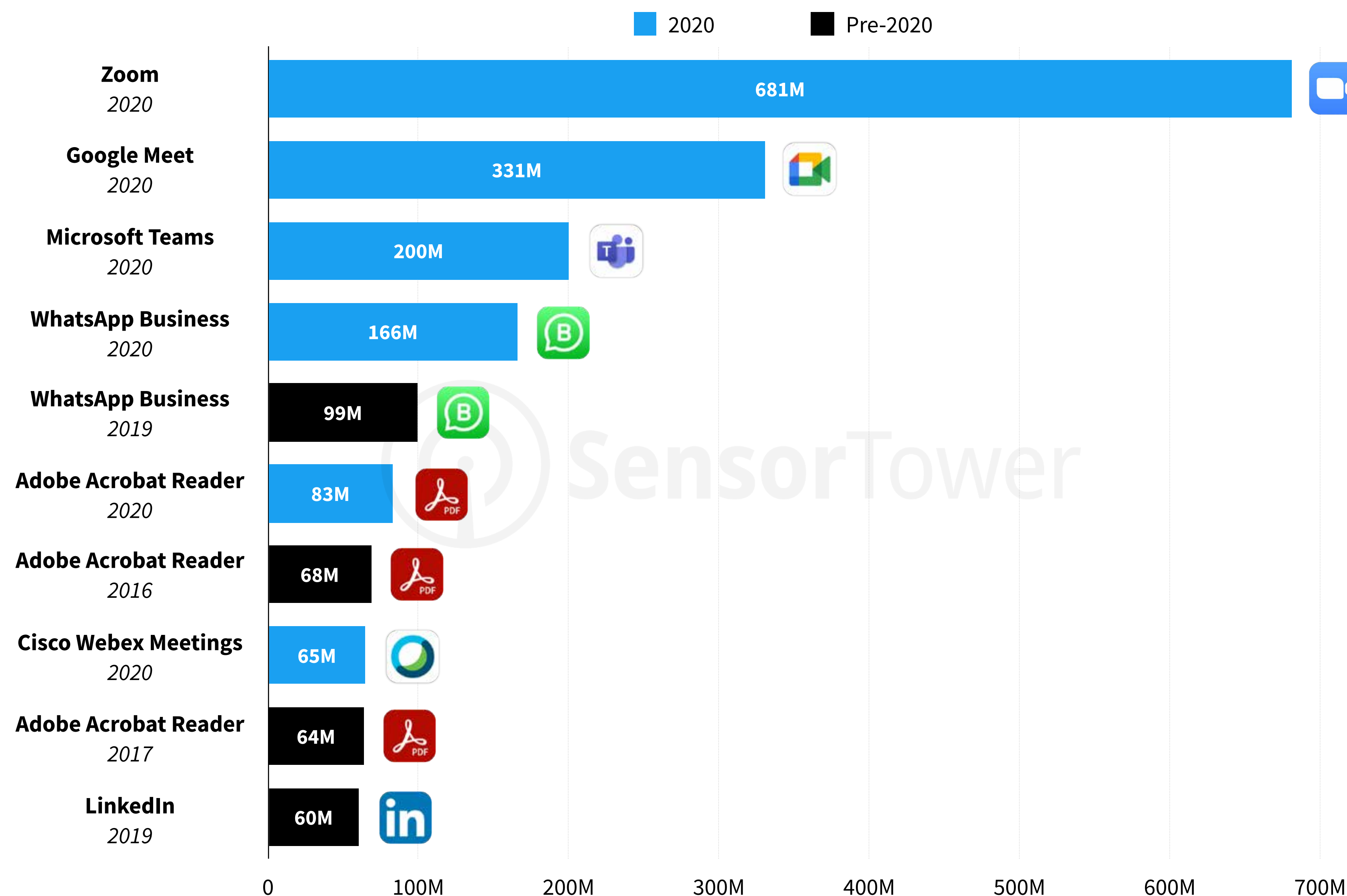


**Business app trends in Europe also reflected the state of the pandemic there.** Download growth fell during the summer months as countries began limited re-openings, but surged again along with cases in the winter months.

**Italy and Germany in particular had high growth, with December totals more than 3.5X the 2019 monthly average.** Growth in Russia, France, and the U.K. was more muted.

**Note Regarding Growth Estimates**  
Growth for each country is calculated vs. the country's average monthly downloads for the category in 2019. China data is App Store only, while all other countries include App Store and Google Play.

# Top Business Apps by Year



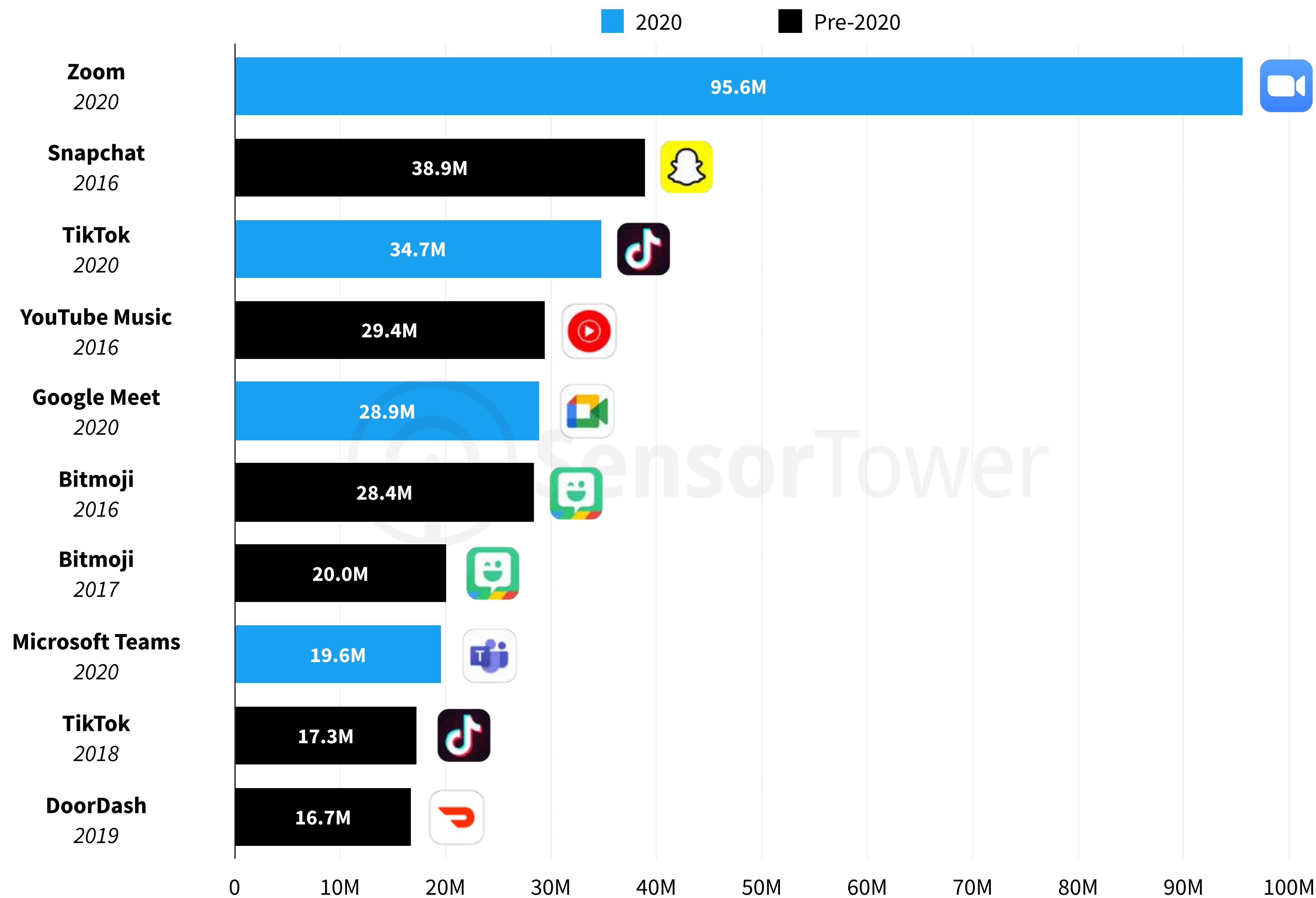
Entering 2020, no business app had ever reached 100 million downloads in a year. **Four apps easily surpassed that threshold in 2020, led by video conferencing standouts Zoom, Google Meet, and Microsoft Teams.**

**Zoom's 681 million downloads were enough to rank No. 4 among apps by worldwide downloads.** Google Meet was also among the top 10 with 331 million downloads.

### Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1, 2016 through Dec. 31, 2020. Apple apps and Google pre-installed apps are excluded. We report unique installs only. Android estimates do not include third-party stores.

# Top Apps by U.S. Growth



**COVID-19 shook up even relatively well-established and stable markets like the U.S.** Zoom’s downloads increased by more than 95 million between 2019 and 2020, far above the year-over-year growth experienced by any other non-game app since 2016.

DoorDash was the top app by U.S. download growth in 2019 at 16.7 million. **Four apps exceeded that total in 2020, including three video conferencing apps.**

### Note Regarding Growth Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1, 2015 through Dec. 31, 2020. Year-over-year growth measures the increase in downloads over the previous year. Data includes growth estimates since 2016. Newly launched apps and games are excluded.



# Stories of the Year:

## 2. Mobile Games Soar to New Highs

Mobile games provided safe entertainment and a way for consumers to stay connected during the pandemic. While games with a strong social component like **Among Us** from **InnerSloth** and **Roblox** did particularly well, nearly all game genres made huge strides in the middle of 2020.

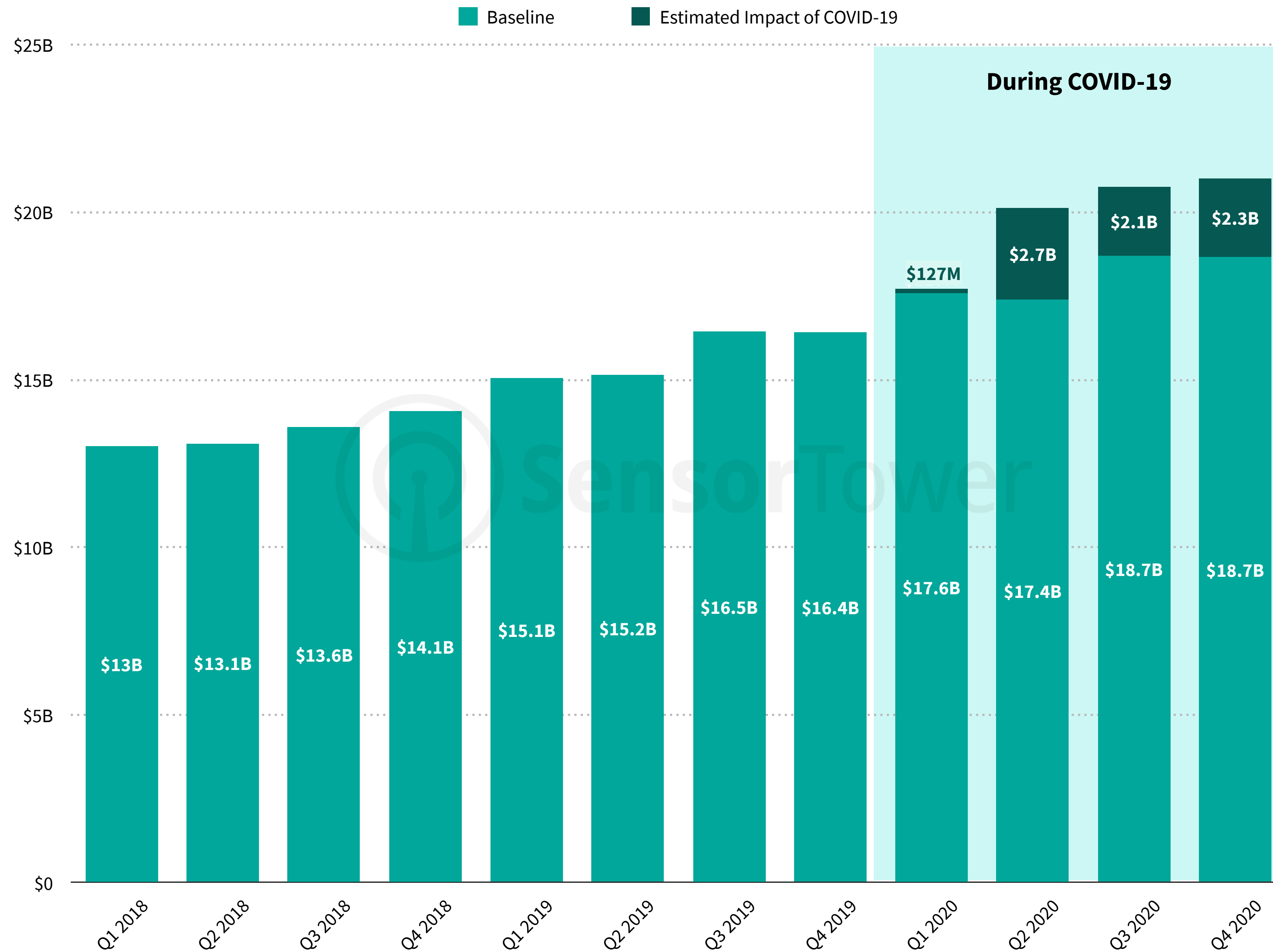
- **Worldwide game revenue surpassed \$21 billion in Q4 2020, up 28 percent year-over-year.** U.S game revenue peaked at more than \$6 billion in Q2 2020.
- **Top game genres all saw U.S. revenue increase following COVID-19.** On the download side, genres popular among commuters like Hypercasual and Arcade took a hit.
- **The decrease in downloads for top hypercasual games was more than made up by increases among other genres.** Seven different genres were represented in the top 10 games by U.S. downloads in 2020.



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# Worldwide Game Revenue



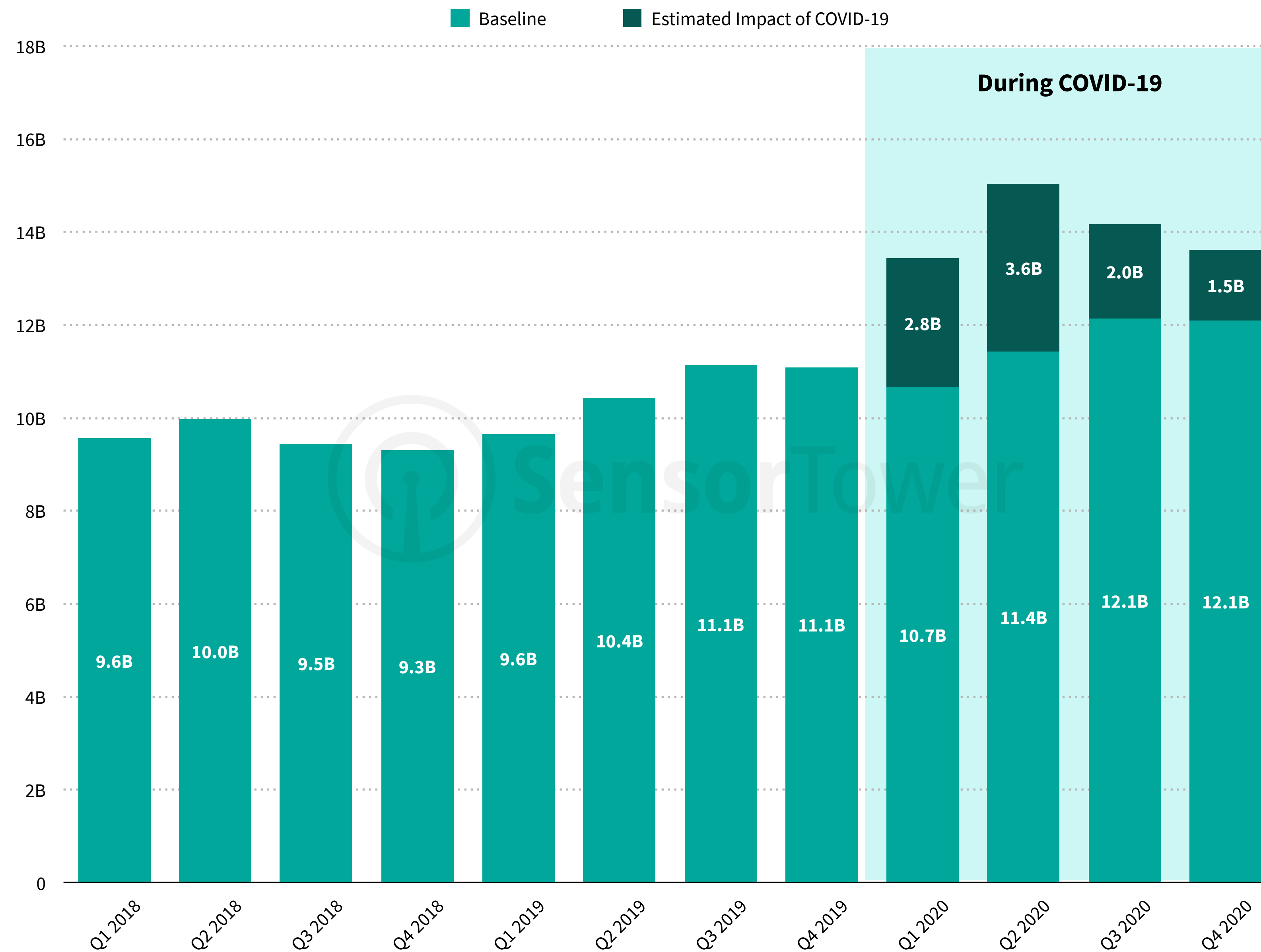
**Worldwide game spending surged following the spread of COVID-19, rising from \$16.4 billion in Q4 2019 to more than \$21 billion in Q4 2020.** Mobile games provided a way for consumers to socialize with friends during the pandemic.

**The boost from COVID-19 persisted throughout 2020, with spending up by an estimated \$2.3 billion in Q4 2020.** This was only down slightly from the estimated impact of COVID-19 in Q2 2020.

**Note Regarding Revenue Estimates**

Our estimates include worldwide revenue for iPhone, iPad, and Google Play for Jan. 1, 2018 through Dec. 31, 2020. 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.

# Worldwide Game Downloads



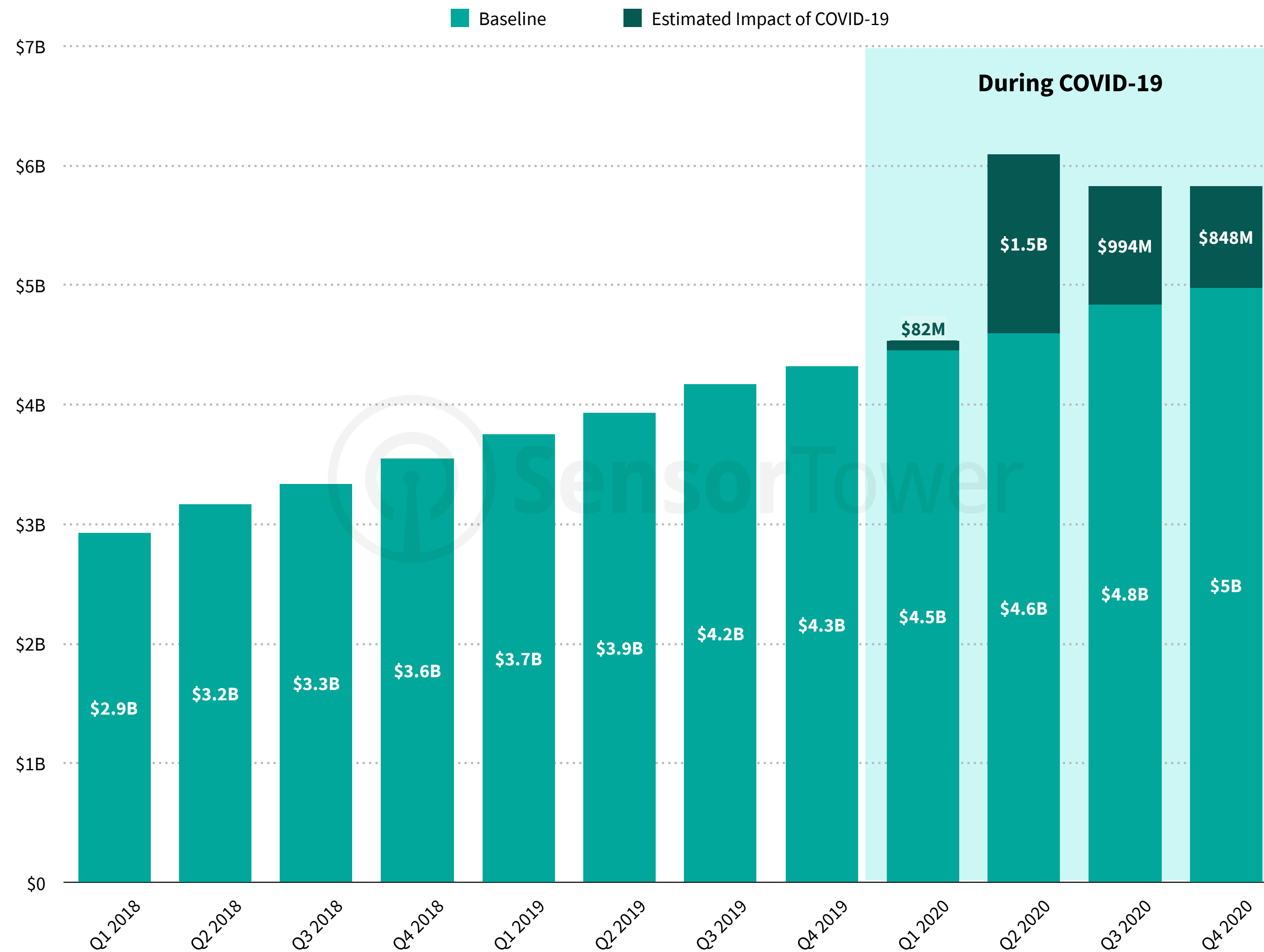
The download surge following COVID-19 was even more pronounced than it was for spending. Worldwide downloads peaked at 15 billion in Q2 2020, up 35 percent from the previous high of 11.1 billion back in Q3 2019.

While the impact from COVID-19 has decreased since April, it remained significant through the end of 2020. COVID-19 contributed an estimated 1.8 billion downloads in April 2020 alone, compared to around 500 million in recent months.

### Note Regarding Download Estimates

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# U.S. Game Revenue



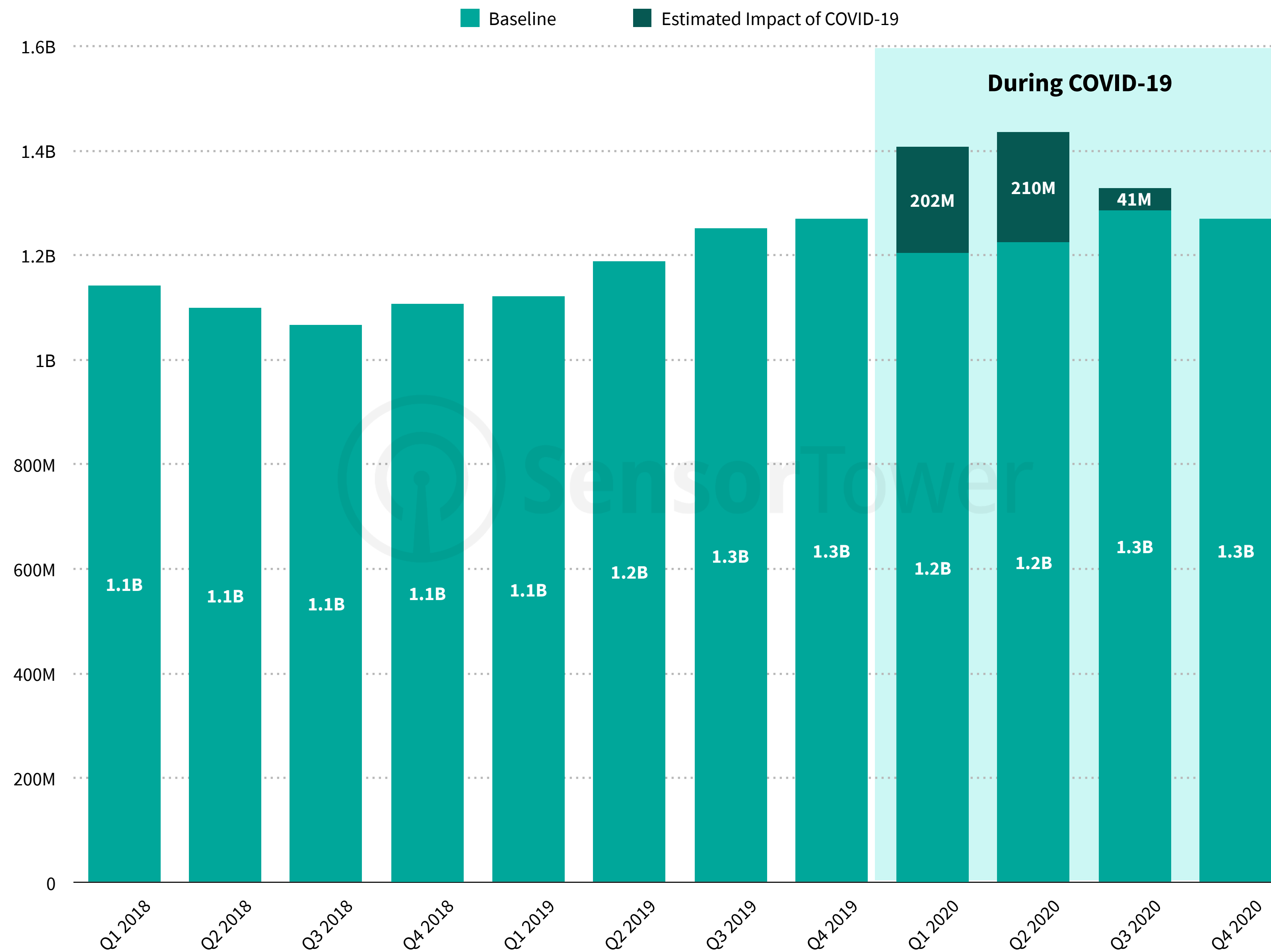
**U.S. game revenue responded quickly to COVID-19, peaking at more than \$6 billion in Q2 2020.** While revenue fell to \$5.8 billion each of next two quarters, this was still an increase of 35 percent Y/Y in Q4 2020.

**Games with a strong social component did particularly well in 2020.** For example, no game experienced higher Y/Y revenue growth in 2020 than Roblox, and it was the top game by U.S. revenue that year as a result.

### Note Regarding Revenue Estimates

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# U.S. Game Downloads



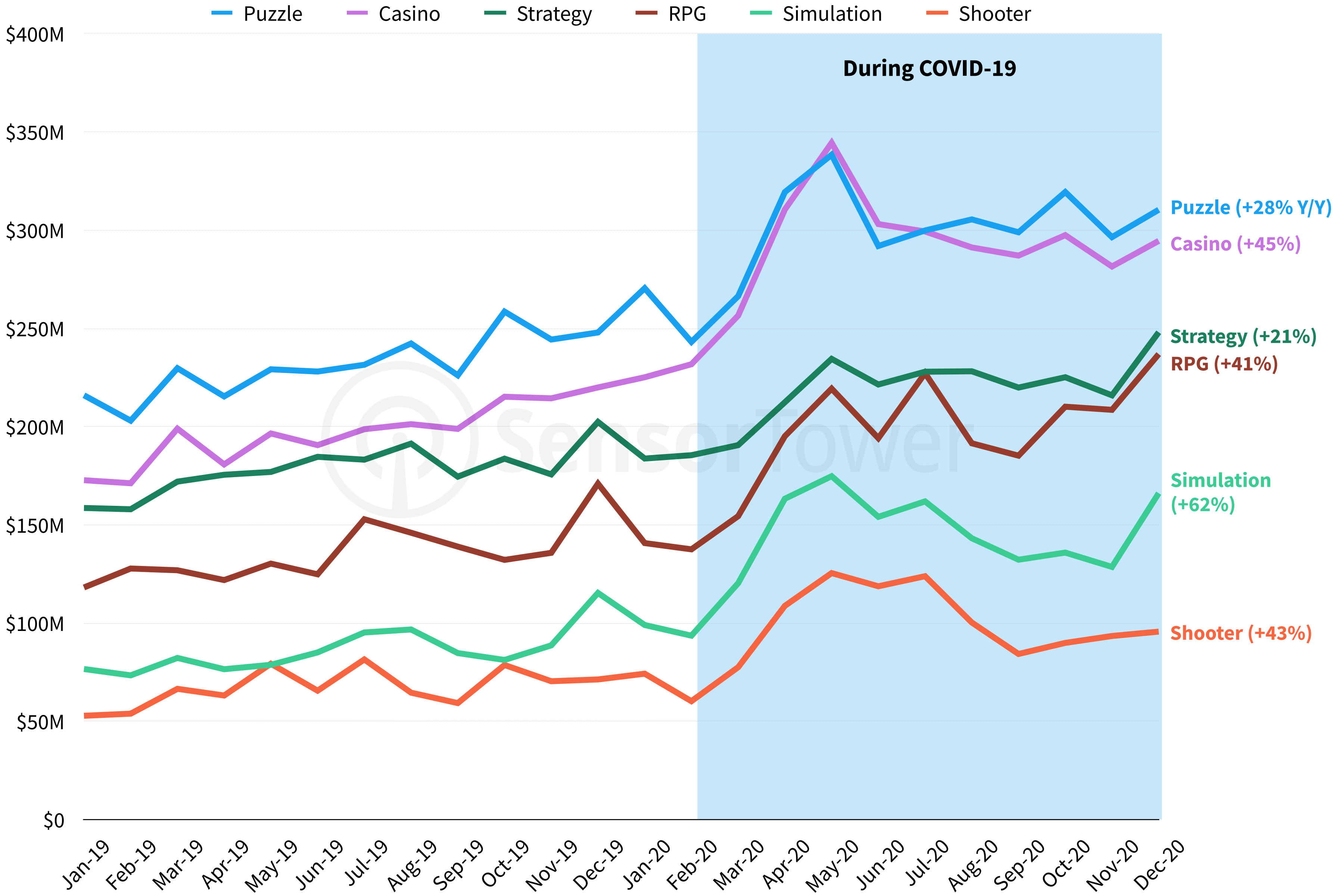
**U.S. game downloads also received a quick boost following COVID-19, reaching an all-time high of more than 1.4 billion in Q2 2020.** Downloads were particularly high in March and April immediately following stay-at-home orders and office closures.

**While games are still generating higher spending in the U.S. than before COVID-19, downloads have returned towards pre-COVID-19 levels.** Much of this decrease was explained by hypercasual games.

### Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1, 2018 through Dec. 31, 2020. 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.

# U.S. Genre Revenue Trends

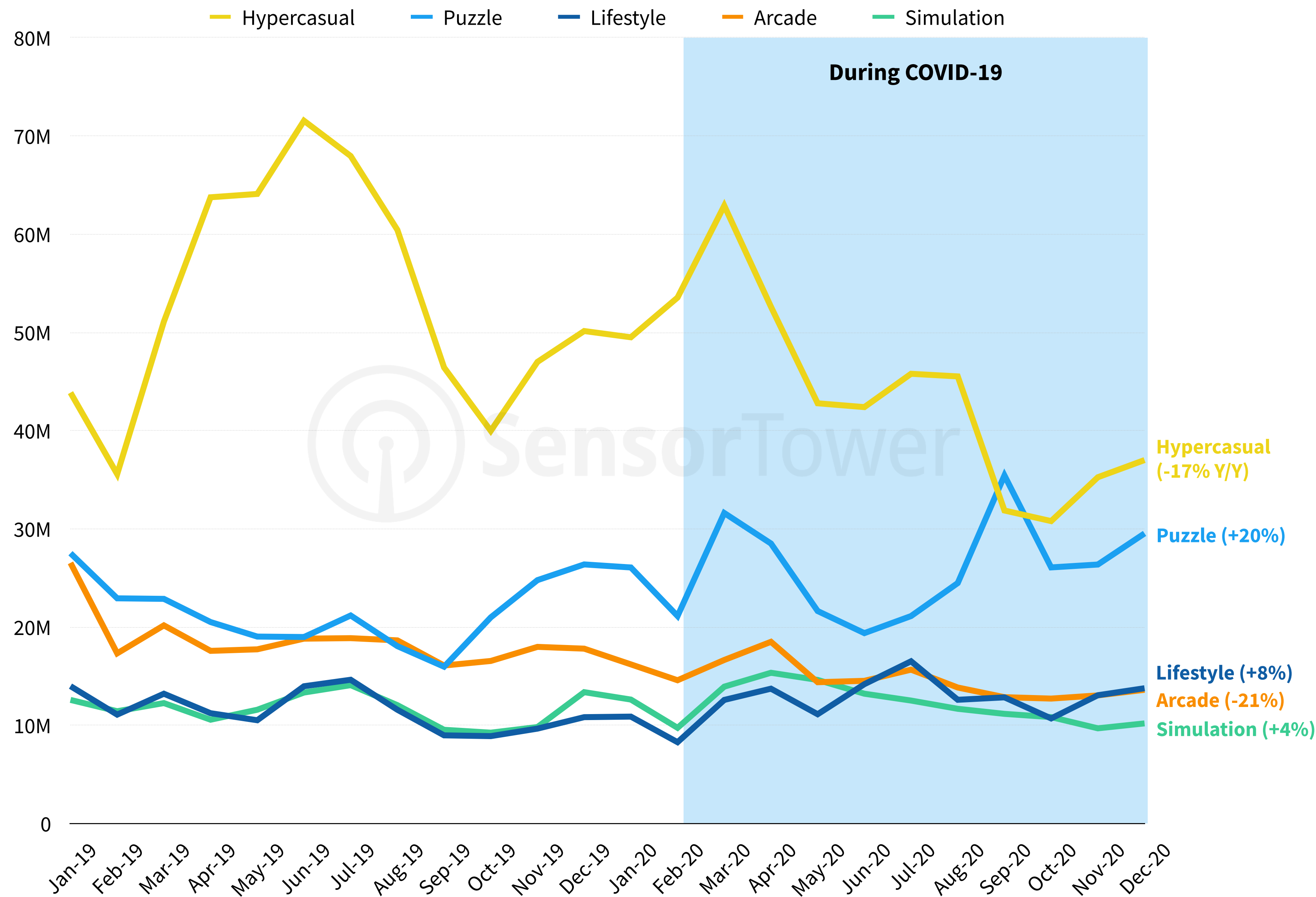


**U.S. game revenue across top genres surged in the months following the spread of COVID-19.** Casino, RPG, simulation, and shooter games saw particularly strong growth.

**Top games by U.S. revenue growth in 2020 included Roblox (Simulation), Coin Master (Casino), Call of Duty: Mobile (Shooter), and Gardenscapes (Puzzle).** The strong revenue growth for shooter games was particularly notable given Fortnite’s removal from the U.S. app stores in August 2020.

**Note Regarding Revenue Estimates**  
Our estimates include worldwide revenue for iPhone, iPad, and Google Play for Jan. 1, 2019 through Dec. 31, 2020. We report gross revenue (including the cut for Apple or Google). Totals include the top 25 games per genre each month by revenue. Year-over-year growth figures are calculated for 2020 vs. 2019.

# U.S. Genre Download Trends



**While there was a surge in hypercasual game downloads in the early months of COVID-19, the reduction in commuting took its toll on the genre.** U.S. downloads for top hypercasual dipped towards the end of 2020.

Not all genres saw downloads decline following COVID-19. Lifestyle installs increased 8 percent Y/Y in 2020, and **puzzle games, led by top game Among Us, saw 20 percent Y/Y growth.**

### Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1, 2019 through Dec. 31, 2020. Apple apps and Google pre-installed apps are excluded. We report unique installs only. Totals include the top 25 games per genre each month by revenue. Year-over-year growth figures are calculated for 2020 vs. 2019.

# Top U.S. Games

■ Hypercasual 
 ■ Puzzle 
 ■ Simulation 
 ■ Shooter 
 ■ Arcade 
 ■ Casino 
 ■ Lifestyle 
 ■ Racing



As overall downloads increased in 2020, it is worth noting that downloads for top games (besides Among Us) decreased compared to their 2019 counterparts. **This suggests that the mobile games space has become more competitive following COVID-19.**

**Top games in 2020 like Among Us and Roblox revealed a preference for social interaction rather than hypercasual play.** With commuting greatly reduced following COVID-19, the presence of hypercasual games among the top 10 games decreased significantly.

**Note Regarding Download Estimates**  
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# Stories of the Year:

## 3. Travel Begins to Bounce Back

While most app categories performed very well in 2020, **Travel** and **Navigation** were two categories that were hit hard by COVID-19. Demand for rideshare, public transportation, and navigation plummeted as offices and other businesses closed. With the world hoping to re-open in 2021, some recent trends in Europe give some indication for how Travel and Navigation will recover this year.

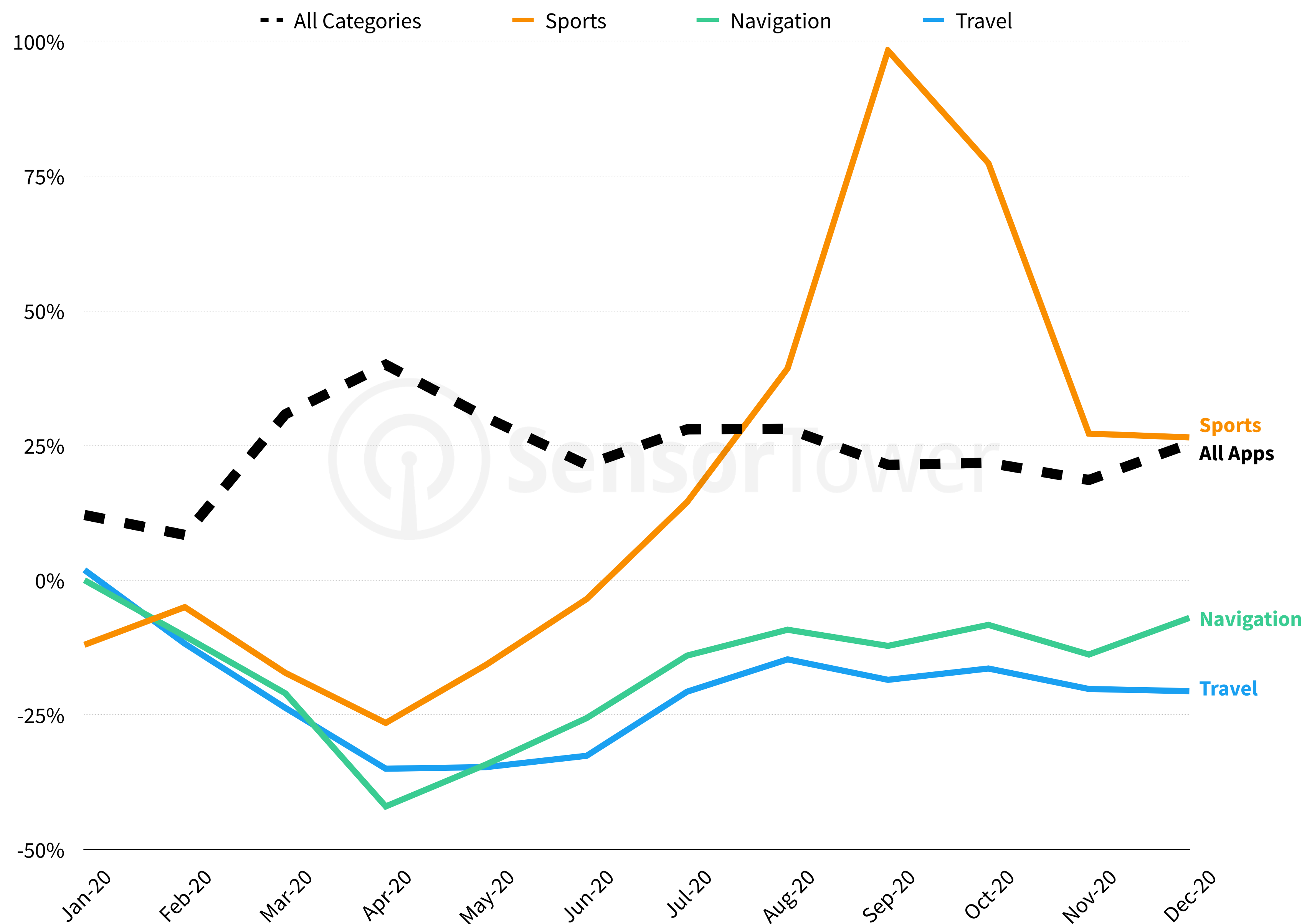
- By December 2020, **travel app downloads were down 20 percent** compared to the average monthly downloads in 2019, while **Navigation downloads were down 7 percent.**
- **Travel and navigation apps showed signs of recovery in late 2020.** Top navigation, rideshare, and online travel agencies in the U.K. started to bounce back in the fall.
- Limited re-openings in the summer in the U.K. suggest that **car travel will return before public transit and air travel.**



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# Worldwide Category Growth



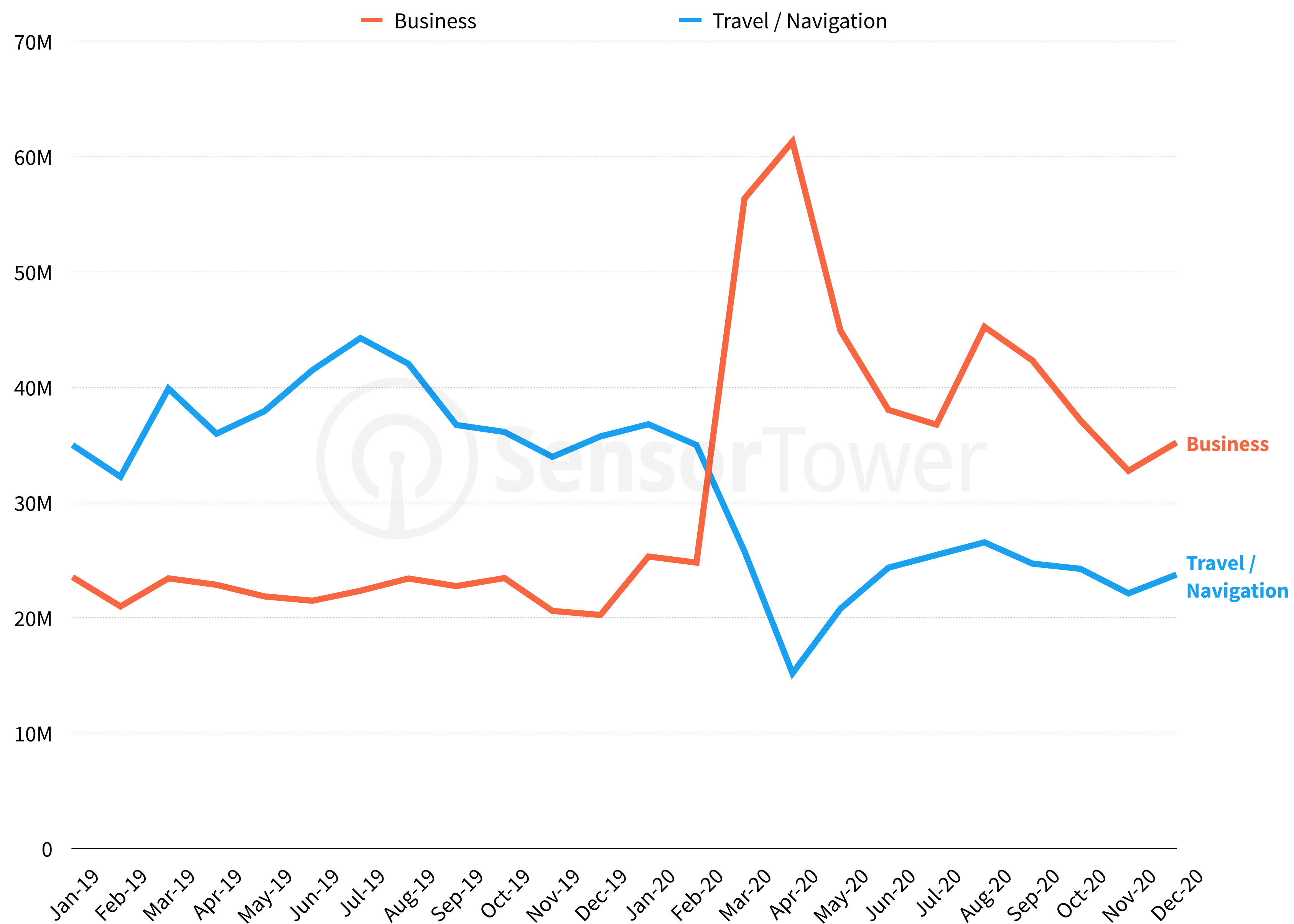
Travel, Navigation, and Sports were the three categories that saw downloads dip following the spread of COVID-19 in early 2020. **While Sports app downloads have bounced back in H2 2020, Travel and Navigation installs remained below pre-COVID-19 levels.**

**India contributed a large portion on the sports app download spike in September and October with the return of the Indian Premier League (played in the U.A.E.).** Many other countries also saw positive Y/Y growth as sports returned, with the U.S. as a notable exception.

### Note Regarding Growth Estimates

Growth for each category is calculated vs. the average monthly downloads in 2019.

# U.S. Downloads by Category



**The COVID-19 pandemic had opposite effects on the Business and Travel/Navigation categories.** While consumers flocked towards business apps to aid their transition to working from home, lockdowns and stay-at-home orders along with reduced commuting took its toll on the Travel and Navigation categories.

**The business app peak and travel app trough occurred in April 2020.** Travel and navigation apps partially rebounded in the summer, but fell again as COVID-19 cases surged in the winter.

**Note Regarding Download Estimates**

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1, 2019 through Dec. 31, 2020. 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 U.S. Travel / Navigation Apps

## 2019

Rank	App	Y/Y Growth
1	Google Maps Google	0%
2	Uber Uber	↓ 11%
3	Lyft Lyft	↓ 6%
4	Waze Google	↓ 12%
5	Airbnb Airbnb	↑ 7%
6	Google Earth Google	↑ 11%
7	Southwest Airlines Southwest Airlines	↑ 38%
8	American Airlines American Airlines	↑ 20%
9	Expedia Expedia	↑ 24%
10	United Airlines United Airlines	↑ 6%

## Early Pandemic

(March - May 2020)

Rank	App	Y/Y Growth
1	Google Maps Google	↓ 22%
2	Uber Uber	↓ 56%
3	Google Earth Google	↑ 5%
4	Lyft Lyft	↓ 54%
5	Waze Google	↓ 53%
6	Airbnb Airbnb	↓ 39%
7	Vrbo Expedia	↓ 14%
8	Expedia Expedia	↓ 52%
9	Booking.com Booking	↓ 59%
10	Hopper Hopper	↓ 44%

## Mid-Year

(June - September 2020)

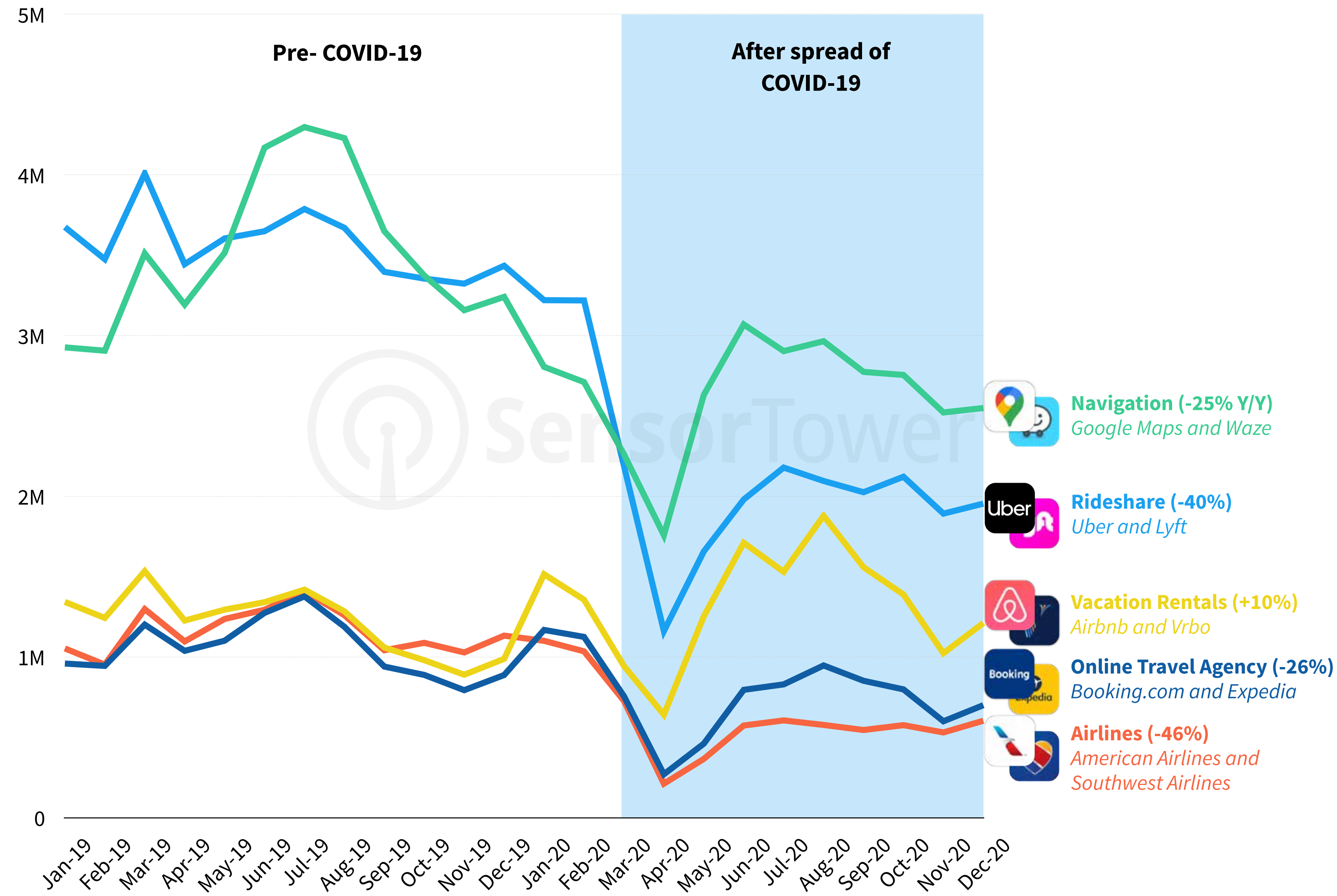
Rank	App	Y/Y Growth
1	Google Maps Google	↓ 19%
2	Uber Uber	↓ 46%
3	Lyft Lyft	↓ 39%
4	Waze Google	↓ 43%
5	Vrbo Expedia	↑ 93%
6	Airbnb Airbnb	↓ 4%
7	Google Earth Google	↓ 12%
8	Booking.com Booking	↓ 2%
9	Expedia Expedia	↓ 54%
10	Southwest Airlines Southwest Airlines	↓ 53%

## Late-Year

(October - December 2020)

Rank	App	Y/Y Growth
1	Google Maps Google	↓ 12%
2	Uber Uber	↓ 41%
3	Lyft Lyft	↓ 41%
4	Waze Google	↓ 32%
5	Google Earth Google	↓ 10%
6	Vrbo Expedia	↑ 99%
7	Airbnb Airbnb	↓ 8%
8	Booking.com Booking	↑ 13%
9	United Airlines United Airlines	↓ 31%
10	American Airlines American Airlines	↓ 38%

# Top Travel Apps in the U.S.



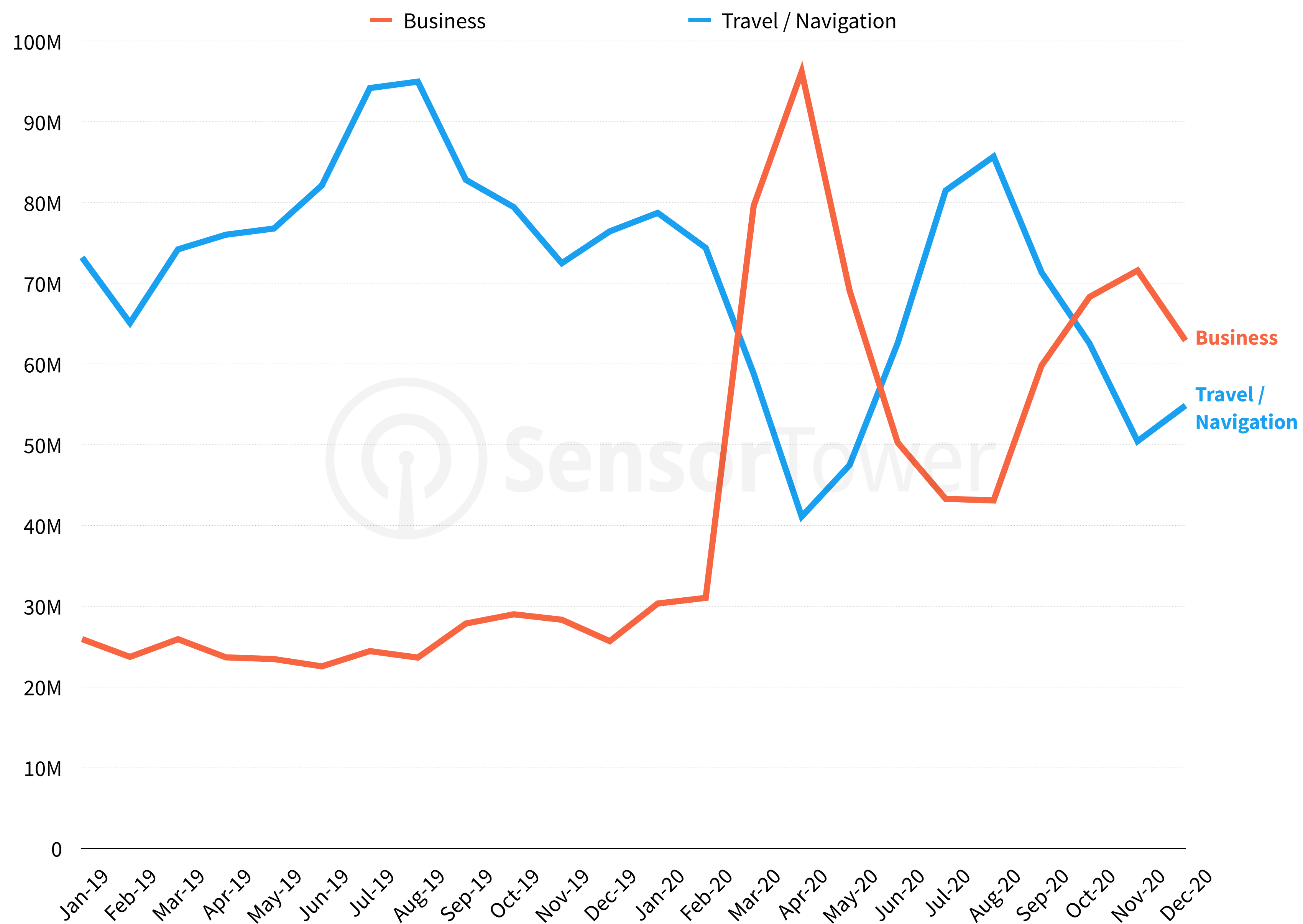
The impact of COVID-19 was not felt equally on all sectors of the Travel app space. Looking at the top two apps for each subcategory, **rideshare and airlines apps were particularly hard hit**, with Y/Y decreases of 40 and 46 percent respectively in 2020.

Navigation and online travel agency apps also took a hit, though not quite as pronounced as rideshare and air travel. Meanwhile, top vacation app rental apps actually saw a year-over-year increase in December 2020, mostly caused by Vrbo.

**Note Regarding Download Estimates**

Downloads include the top two apps by downloads in 2020 for each subcategory. Year-over-year growth figures are calculated for 2020 vs. 2019.

# Europe Downloads by Category



In Europe, the impact of COVID-19 on business and travel/navigation app downloads was similar to that seen in the U.S. However, one key difference was the reversal in trends during the summer as countries began to re-open. **This gives hope for a strong return in 2021 once countries are able to safely re-open.**

**As COVID-19 cases began to surge again during the winter, travel and navigation app downloads fell.** Monthly downloads did not dip to as low as they were in April and May, but were still down 28 percent Y/Y in December.

### Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1, 2019 through Dec. 31, 2020. 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 U.K. Travel / Navigation Apps

## 2019

Rank	App	Y/Y Growth
1	Google Maps Google	↓ 2%
2	Uber Uber	↓ 4%
3	Trainline Trainline	↑ 14%
4	Booking.com Booking	↓ 13%
5	Waze Google	↓ 6%
6	Google Earth Google	↑ 11%
7	Ryanair Ryanair	↓ 1%
8	what3words what3words	↑ +1,363%
9	easyJet easyJet	↑ 7%
10	Airbnb Airbnb	↑ 7%

## Early Pandemic (March - May 2020)

Rank	App	Y/Y Growth
1	Google Maps Google	↓ 26%
2	Google Earth Google	↓ 2%
3	Flightradar24 Flightradar24	↑ 79%
4	Uber Uber	↓ 59%
5	Waze Google	↓ 53%
6	Ola Ola	↑ 69%
7	Trainline Trainline	↓ 68%
8	Booking.com Booking	↓ 69%
9	OS Maps Ordnance Survey	↑ 67%
10	RingGo RingGo	↓ 56%

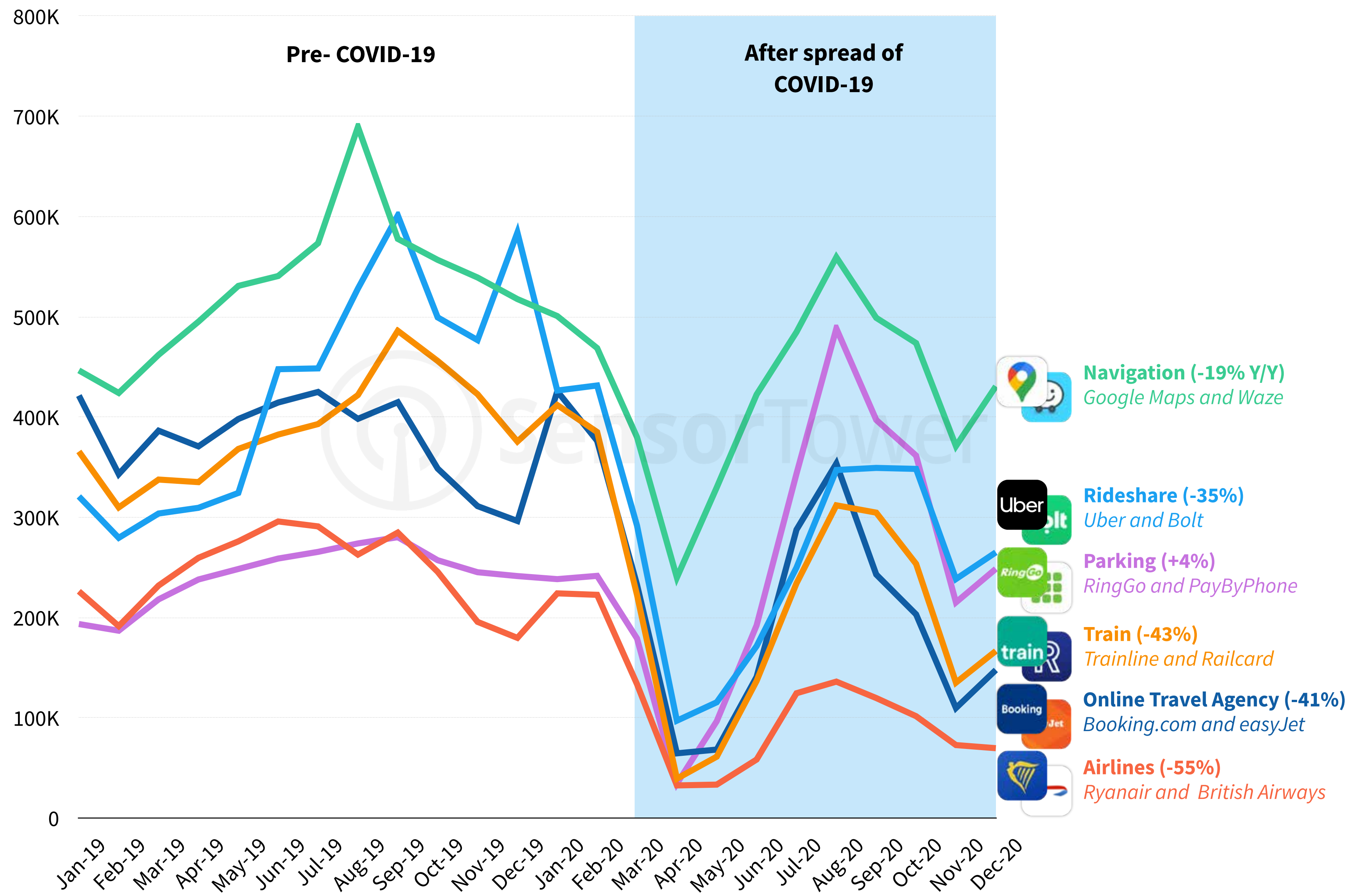
## Mid-Year (June - September 2020)

Rank	App	Y/Y Growth
1	Google Maps Google	↓ 11%
2	what3words what3words	↓ 4%
3	RingGo RingGo	↑ 31%
4	Trainline Trainline	↓ 42%
5	Uber Uber	↓ 46%
6	Booking.com Booking	↓ 26%
7	Google Earth Google	↓ 5%
8	Waze Google	↓ 29%
9	PayByPhone PayByPhone	↑ 32%
10	JustPark JustPark	↑ 60%

## Late-Year (October - December 2020)

Rank	App	Y/Y Growth
1	Google Maps Google	↓ 16%
2	Uber Uber	↓ 45%
3	RingGo RingGo	↑ 17%
4	Google Earth Google	↑ 5%
5	Trainline Trainline	↓ 56%
6	Waze Google	↓ 29%
7	what3words what3words	↓ 3%
8	Booking.com Booking	↓ 38%
9	PayByPhone PayByPhone	↑ 4%
10	Bolt Bolt	↓ 47%

# Top Travel Apps in the U.K.



The limited re-opening during the summer gave a preview of how travel will return. **Car travel bounced back before public transit and air travel, with parking app downloads surging during the late summer and early fall.**

**Rideshare and airline apps will have to wait longer for demand to return.** While top parking apps saw downloads increase by 78 percent Y/Y in August, downloads for the top rideshare and airlines apps were still down 34 percent and 48 percent, respectively. Still, all subcategories made notable progress during the summer.

### Note Regarding Download Estimates

Downloads include the top two apps by downloads in 2020 for each subcategory. Year-over-year growth figures are calculated for 2020 vs. 2019.



# Sensor Tower Solutions



## Top Charts & Leaderboards

Monitor app trends throughout the global app economy.



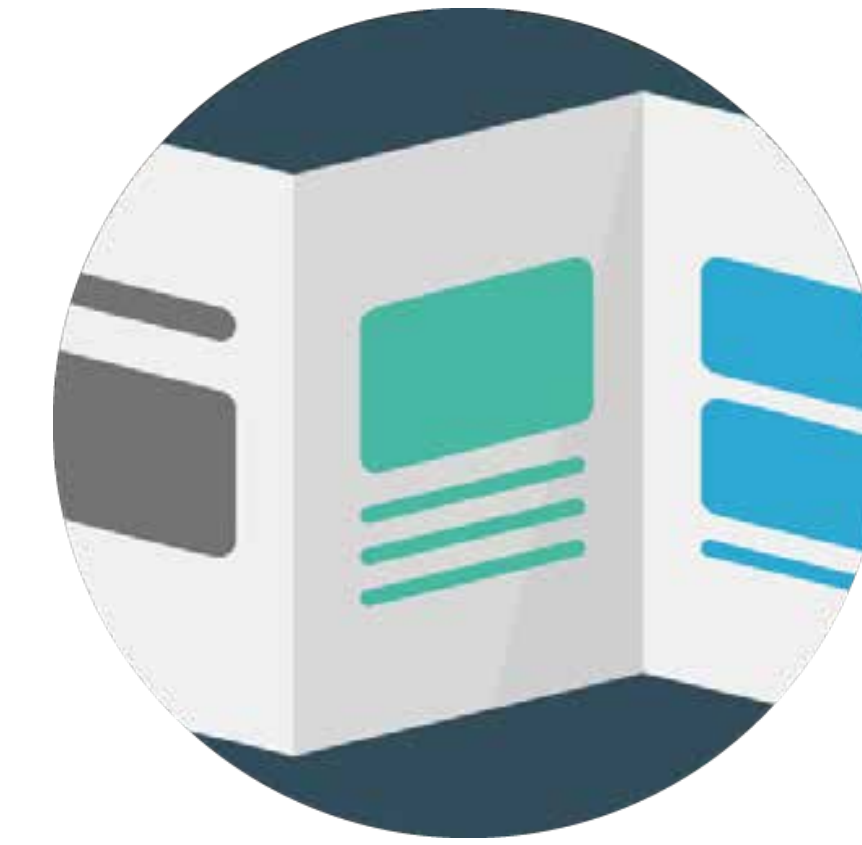
## Store Intelligence

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.

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please request a demo:

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# Sensor Tower

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# 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.

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