



Q1 2021: Store Intelligence Data Digest

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



Executive Summary: Highlights



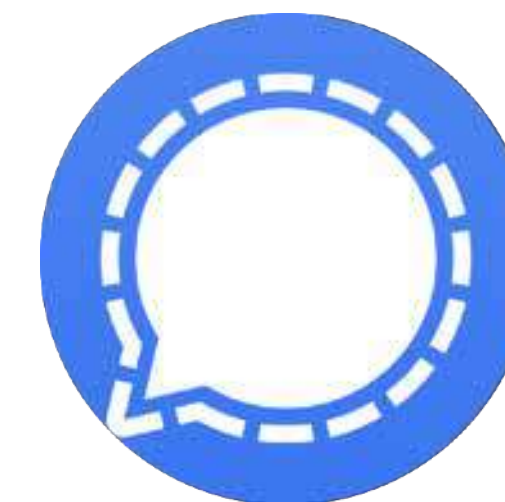
Worldwide app downloads totaled 36.6 billion in 1Q21, an 8.7% year-over-year increase. App Store downloads fell 8.6% to 8.4B (due to an outsized total in 1Q20 during the initial spread of COVID-19), while Google Play downloads increased 15.3% to 28.2B.



Crash Bandicoot: On the Run from King showed the power of popular console and PC properties on mobile, releasing worldwide on March 25. The game was a massive success in its first week, becoming the most downloaded title in Q1 2021.



Q1 2021 was a dynamic quarter for finance apps, with increased demand for stock trading apps caused by the WallStreetBets subreddit and soaring cryptocurrency prices. **As a result, stock trading and cryptocurrency apps saw installs skyrocket.**



Secure messaging apps continued to gain popularity in Q1 2021. Apps such as Telegram and Signal experienced rapid growth last quarter and gained market share versus the top established messaging apps.

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, 2016 through March 31, 2021.
- Download estimates presented are on a per-user basis, meaning that only one download per Apple or Google account is counted towards the total.
- Downloads of the same app by the same user to multiple devices, updates, or re-installs of the same app by the same user are not counted towards the total.
- Android app install estimates represent downloads from the Google Play Store only. Sensor Tower does not provide download estimates for third-party Android stores.

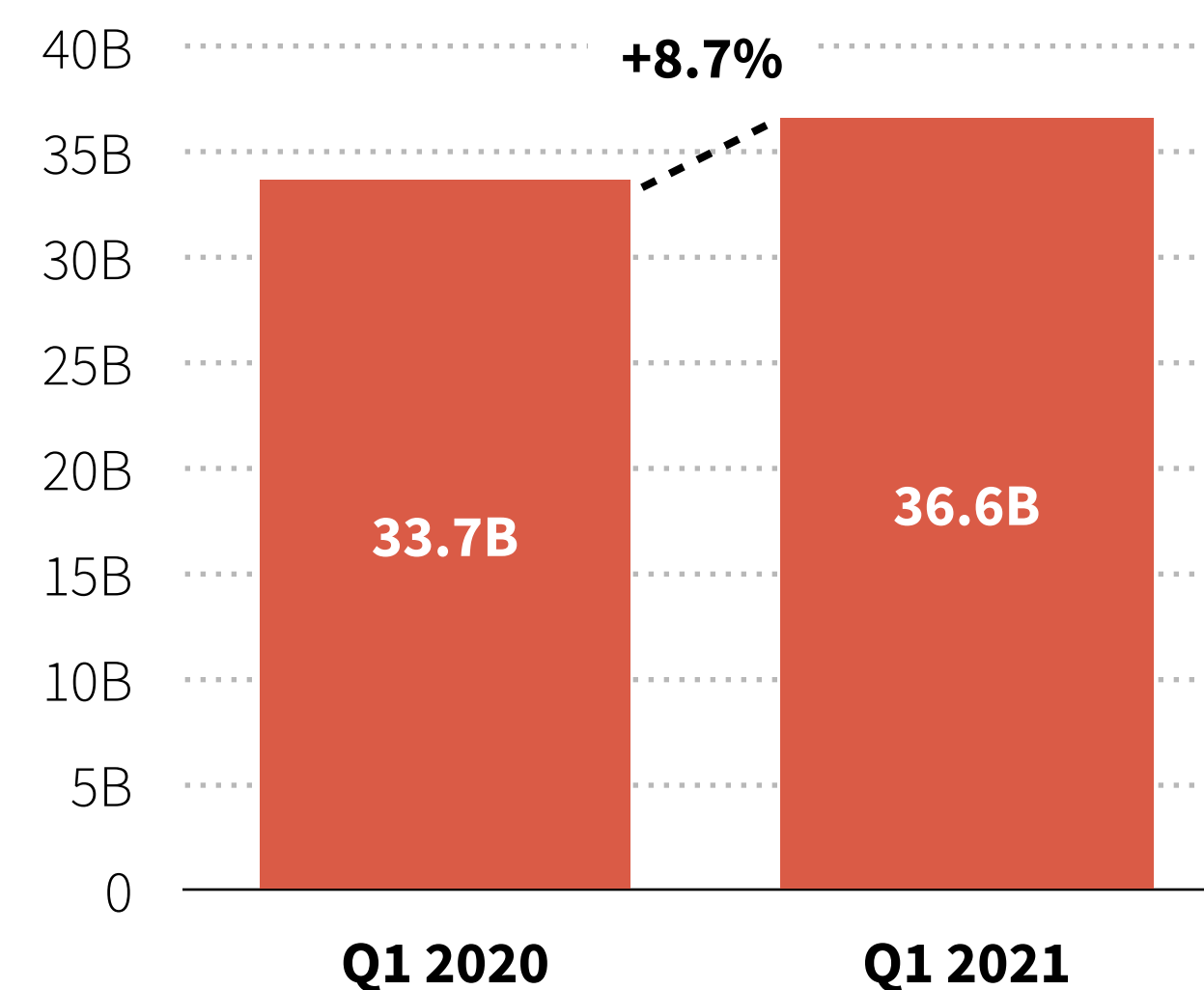
Could your business benefit from access to Store Intelligence insights and the highly accurate data used to build this report? See the fastest growing apps and publishers by downloads or revenue.

REQUEST DEMO

Market Overview:

Q1 2021 Worldwide Download Growth

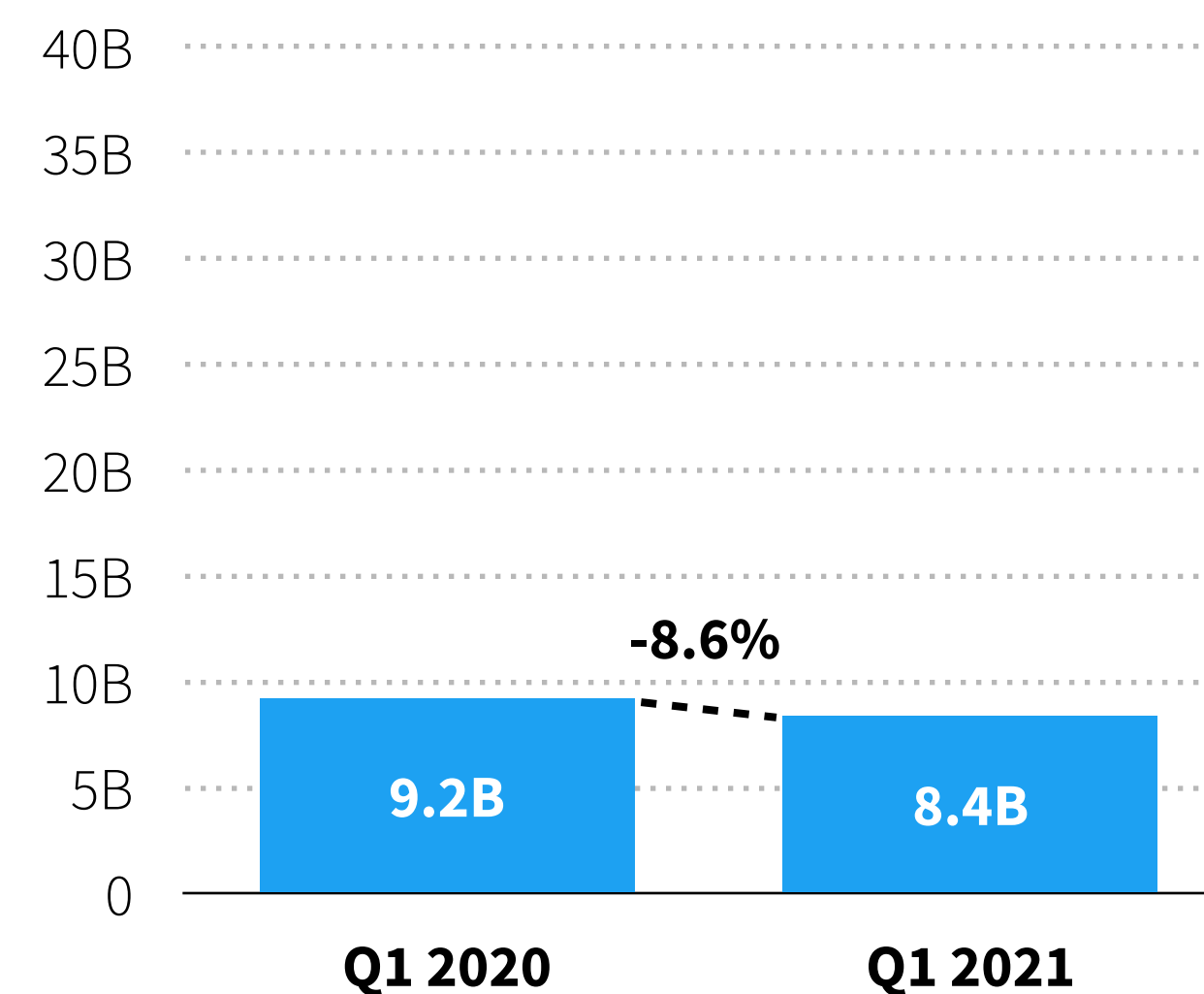
Worldwide App Store and Google Play Downloads



36.7 Billion

App Store + Google Play Downloads

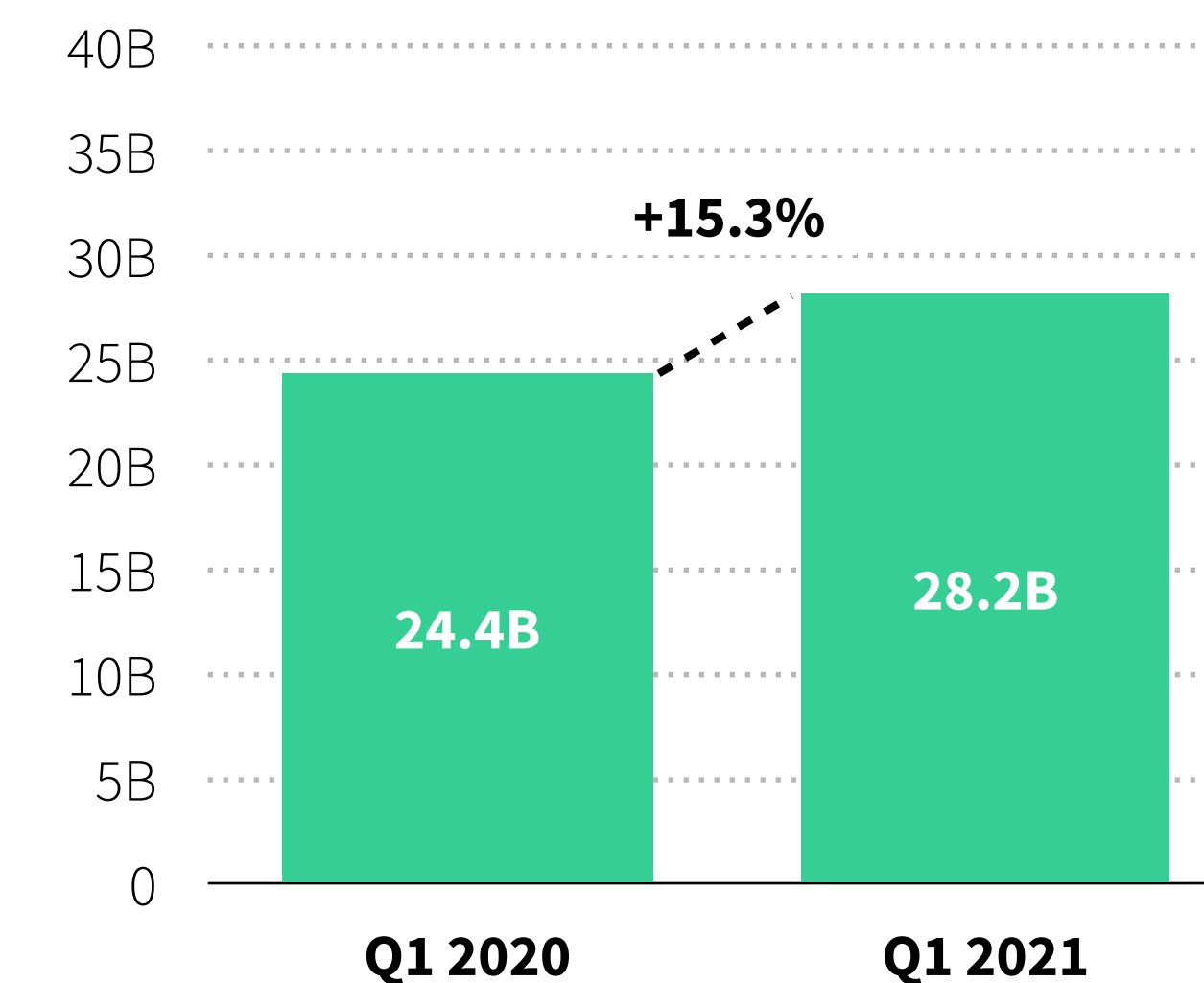
Worldwide App Store Downloads



8.4 Billion

App Store Downloads

Worldwide Google Play Downloads



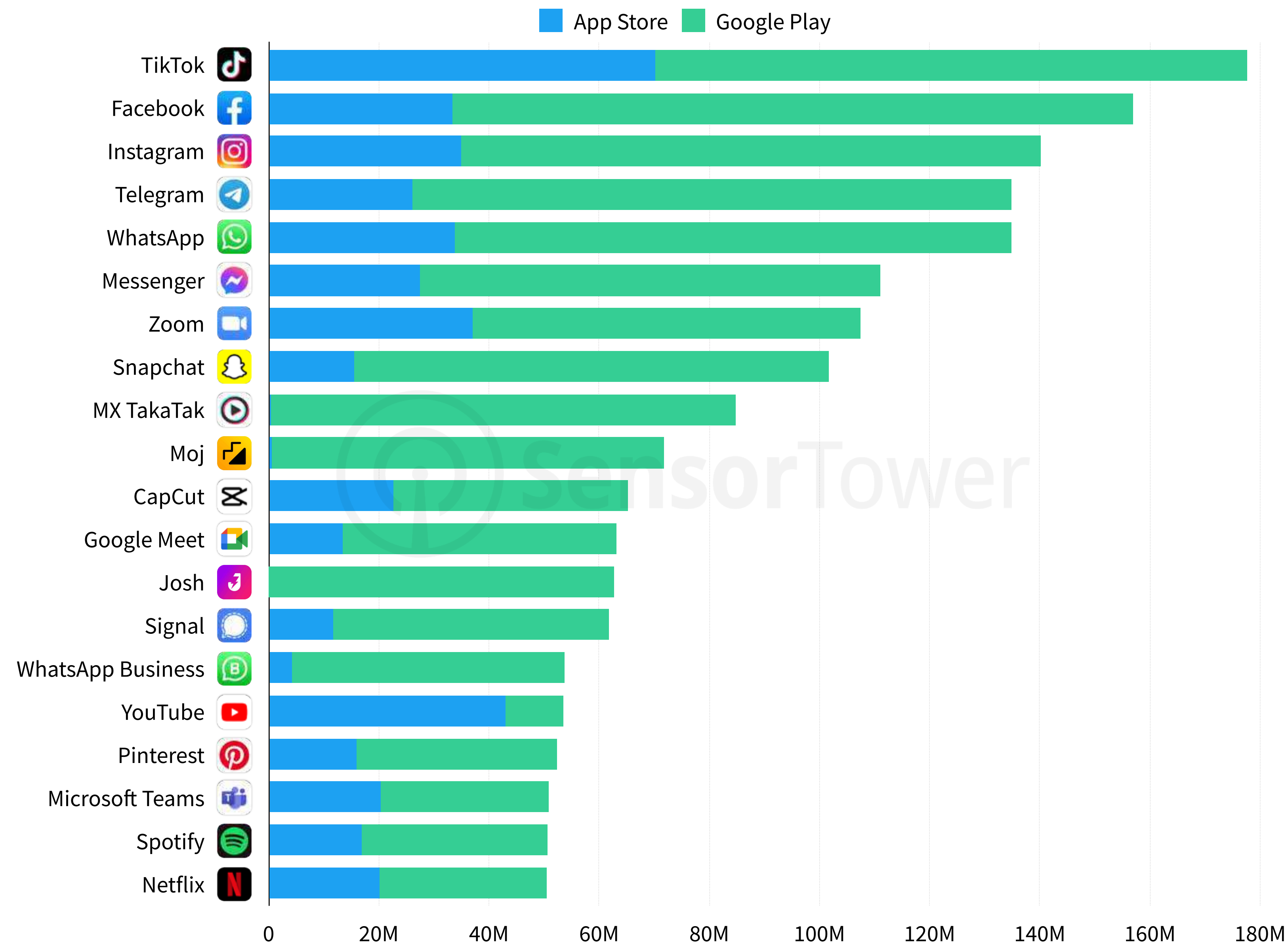
28.2 Billion

Google Play Downloads

Top Apps

Top Apps by Downloads in Q1 2021

Overall - Worldwide



TikTok was once again the top mobile app by worldwide downloads, ranking as the top app for the third consecutive quarter.

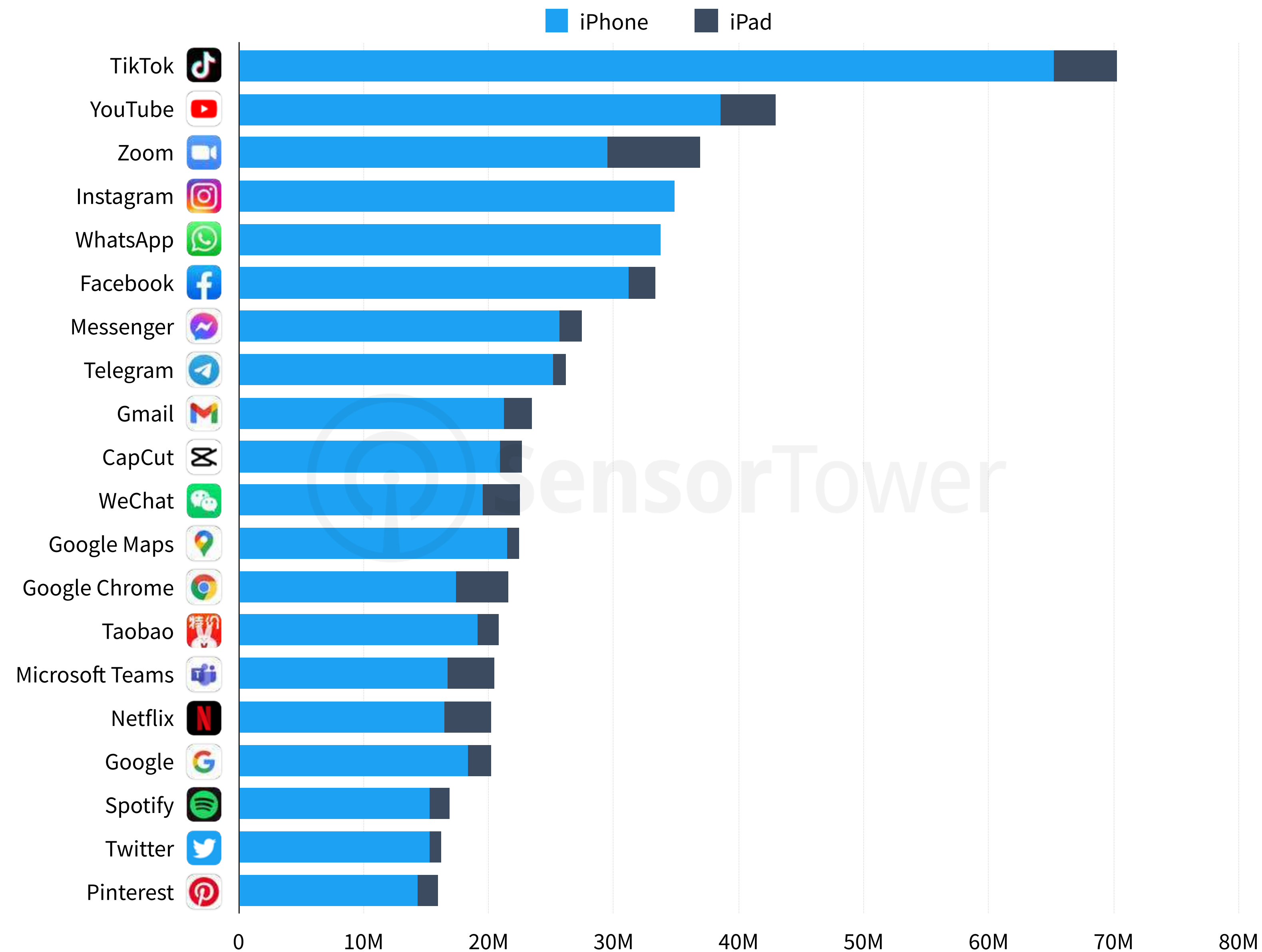
The only time TikTok did not rank No. 1 in a quarter since the start of 2020 was when Zoom edged it out in Q2 2020 at the beginning of the COVID-19 pandemic.

Some short video apps were able to take advantage of TikTok's ban in India. MX TakaTak, Moj, and Josh were some examples among the top 20 apps.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1 through Mar. 31, 2021. 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



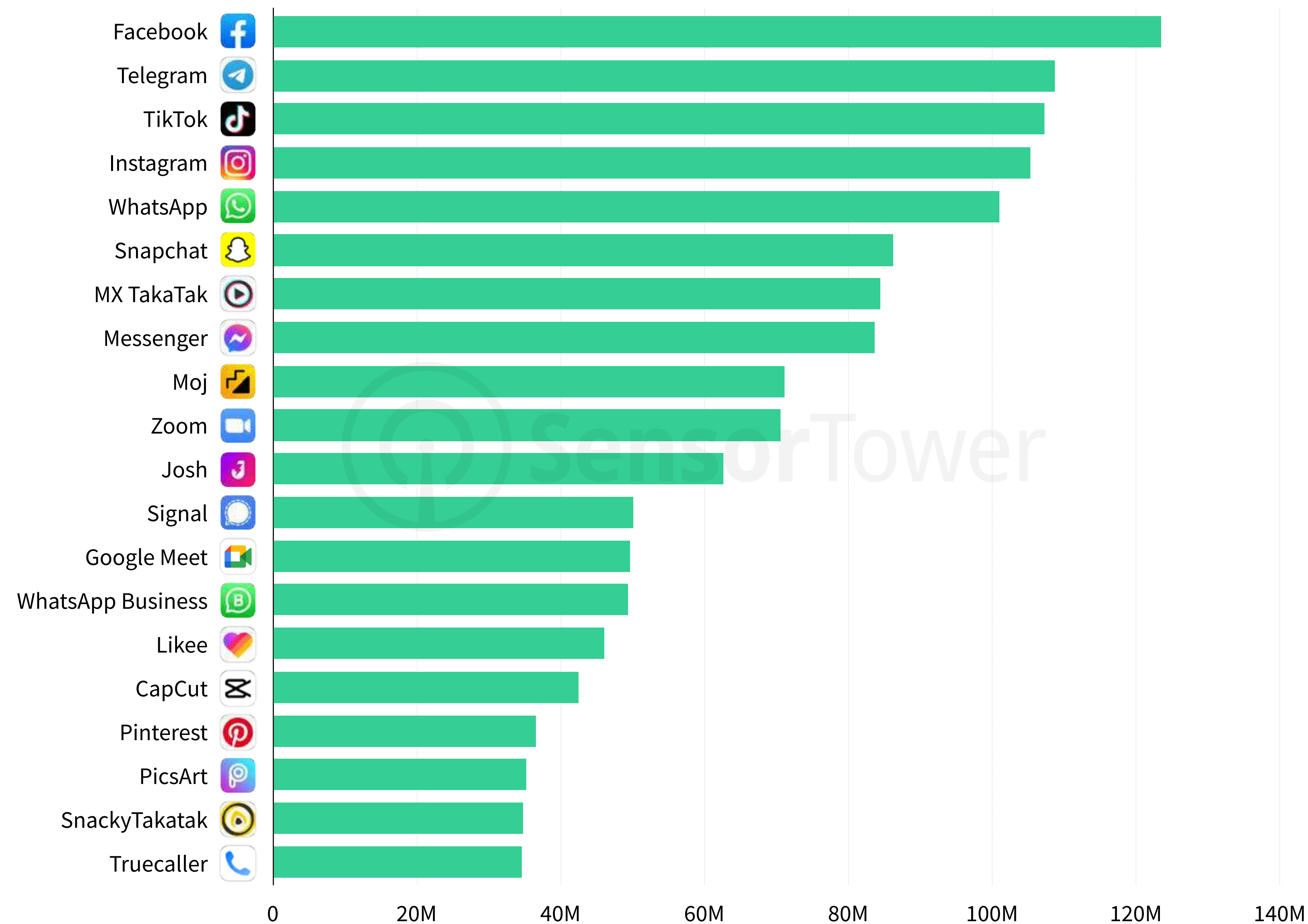
The top five apps held their positions from the previous quarter. Zoom's installs decreased for the third consecutive quarter, but it still managed to rank No. 3 in Q1 2021.

Telegram and CapCut were the only new entrants into the top 10. Telegram saw downloads spike 60 percent quarter-over-quarter to an all-time high, while CapCut, a video editing app from TikTok's publisher ByteDance, had its second best quarter so far.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Jan. 1 through Mar. 31, 2021. 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



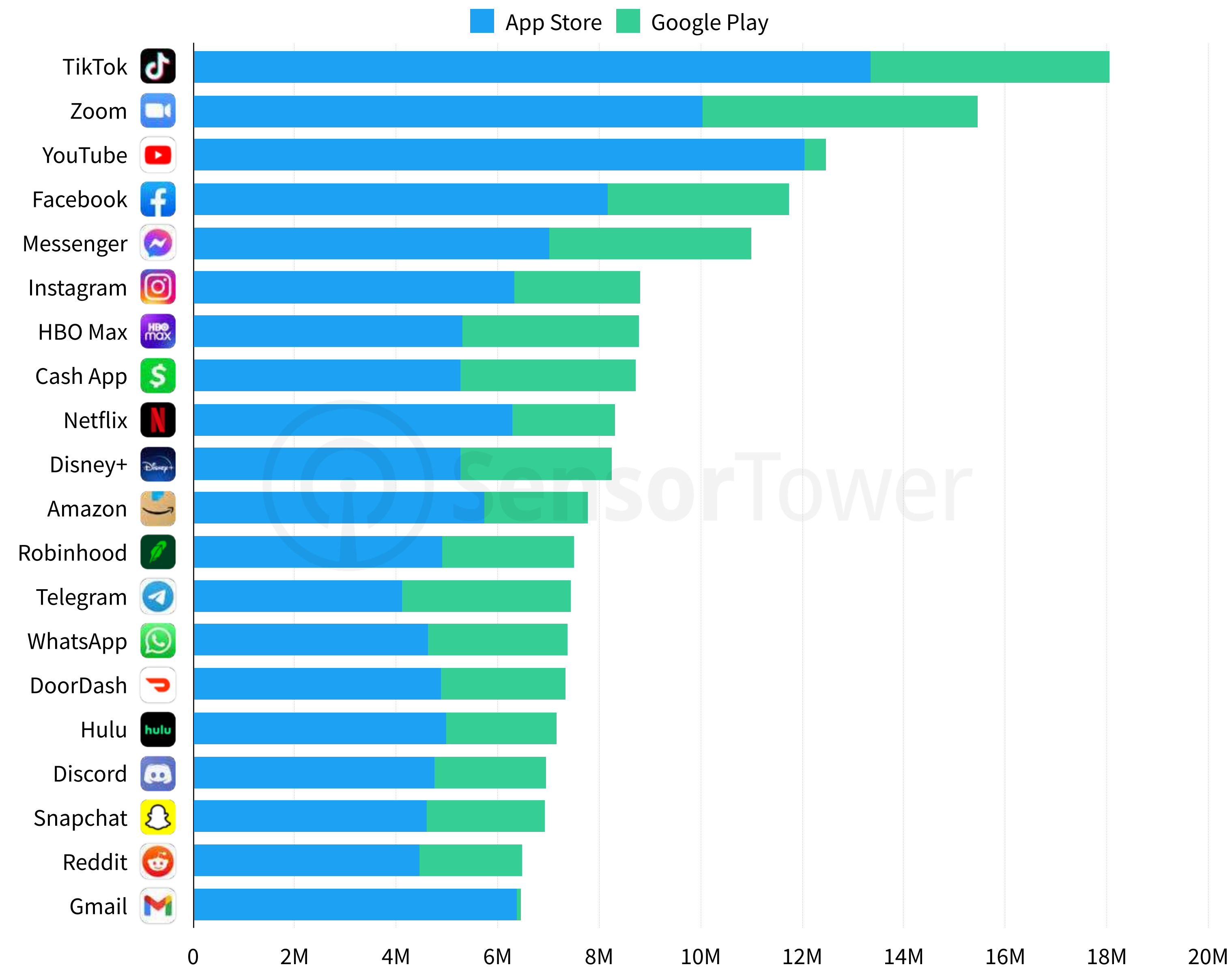
Short video apps continued to perform well on Google Play, and in India in particular. MX TakaTak, Moj, Josh, and SnackyTakatak combined for more than 250M installs in Q1 2021 with nearly all of them coming from India. **TikTok still ranked No. 3 despite not being available in India.**

Secure messaging apps also had a great quarter. Telegram moved up seven spots to rank No. 2 and Signal's installs grew from 2 million in Q4 2020 to more than 50 million.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for Google Play for Jan. 1 through Mar. 31, 2021. 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



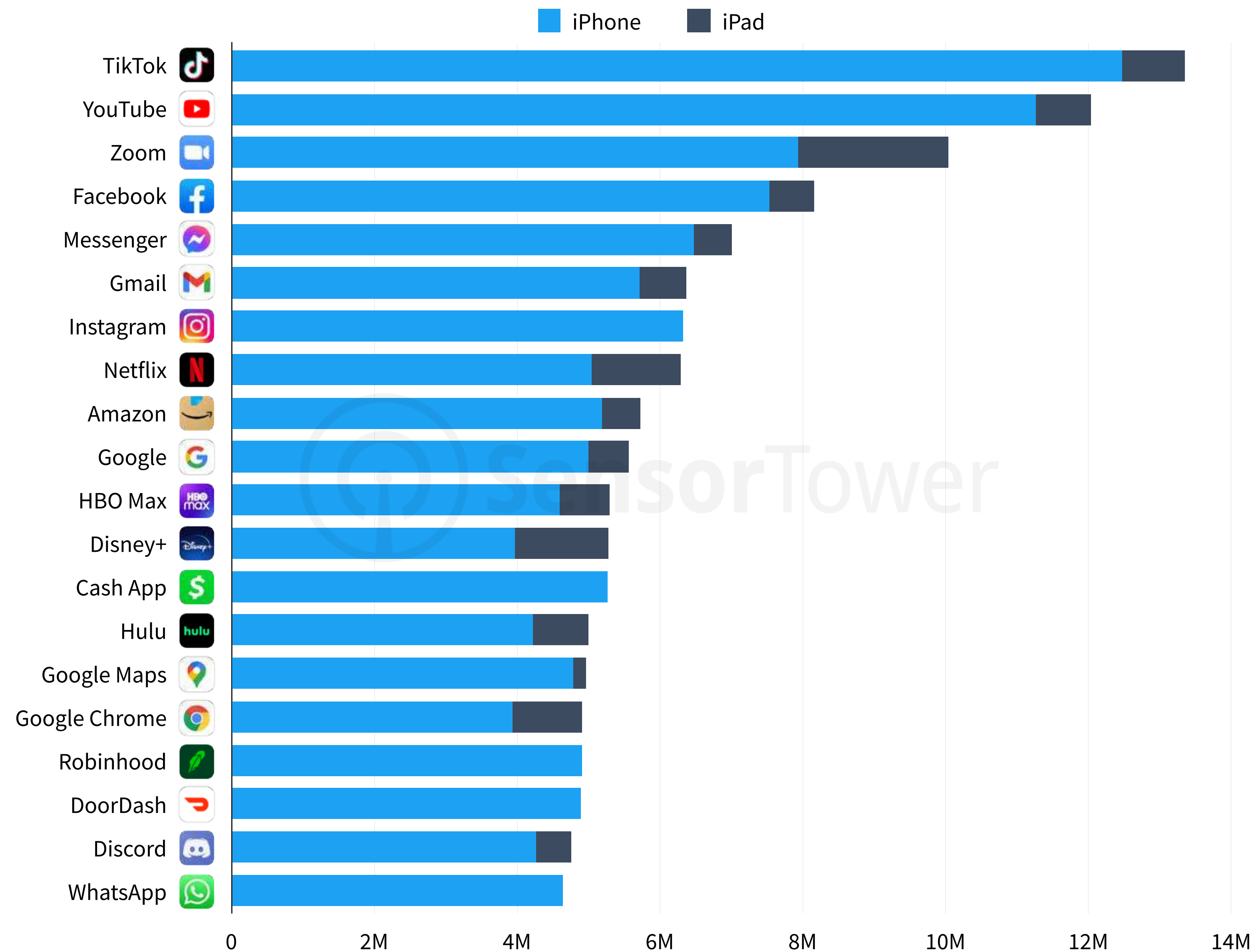
Zoom's reign as the top app in the U.S. ended in Q1 2021 after three consecutive quarters at No. 1. TikTok ranked as the top app for the first time since a year prior.

Robinhood entered the top 20 after it received increased attention during the market volatility caused by so-called "meme stocks". It also benefited from the cryptocurrency boom during the quarter.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1 through Mar. 31, 2021. 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



TikTok was also the top app by App Store downloads in the U.S. The top five apps were the same as the overall rankings, with the only difference in order being YouTube and Zoom switching places for the App Store.

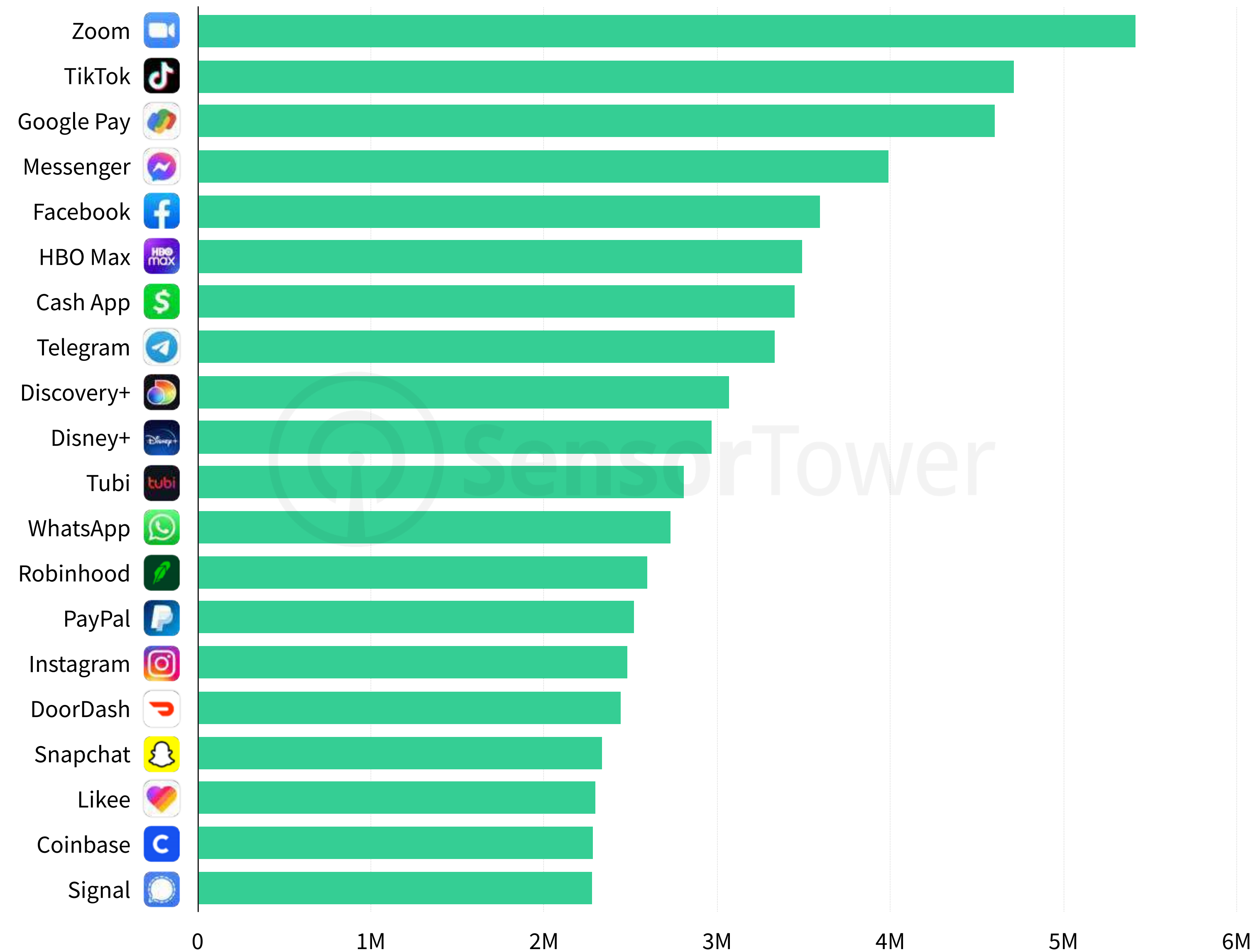
The subscription video on demand (SVOD) space remained competitive in the U.S.

Netflix led the pack at No. 8, with HBO Max (No. 11), Disney+ (No. 12), and Hulu (No. 14) close behind.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Jan. 1 through Mar. 31, 2021. 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



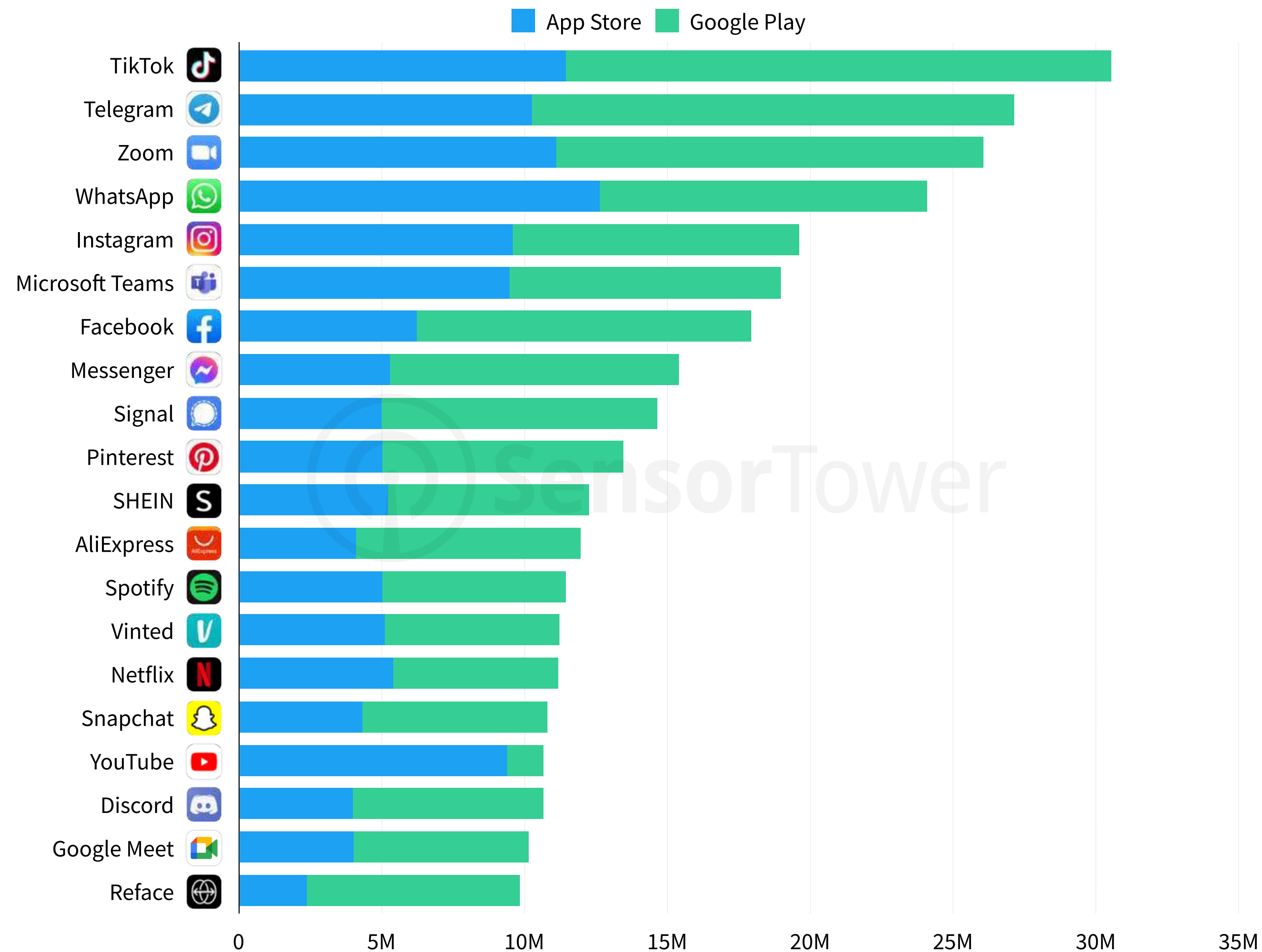
Zoom managed to hold onto the No. 1 spot on Google Play for the fourth consecutive quarter. Meanwhile, Discovery+ was a notable new entrant to the top 10 following its launch in early January, 2021.

Finance apps had a great quarter on Google Play, with payment apps Google Pay and Cash App leading the way. Stock trading and cryptocurrency apps like Robinhood and Coinbase also performed very well.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for Google Play for Jan. 1 through Mar. 31, 2021. 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



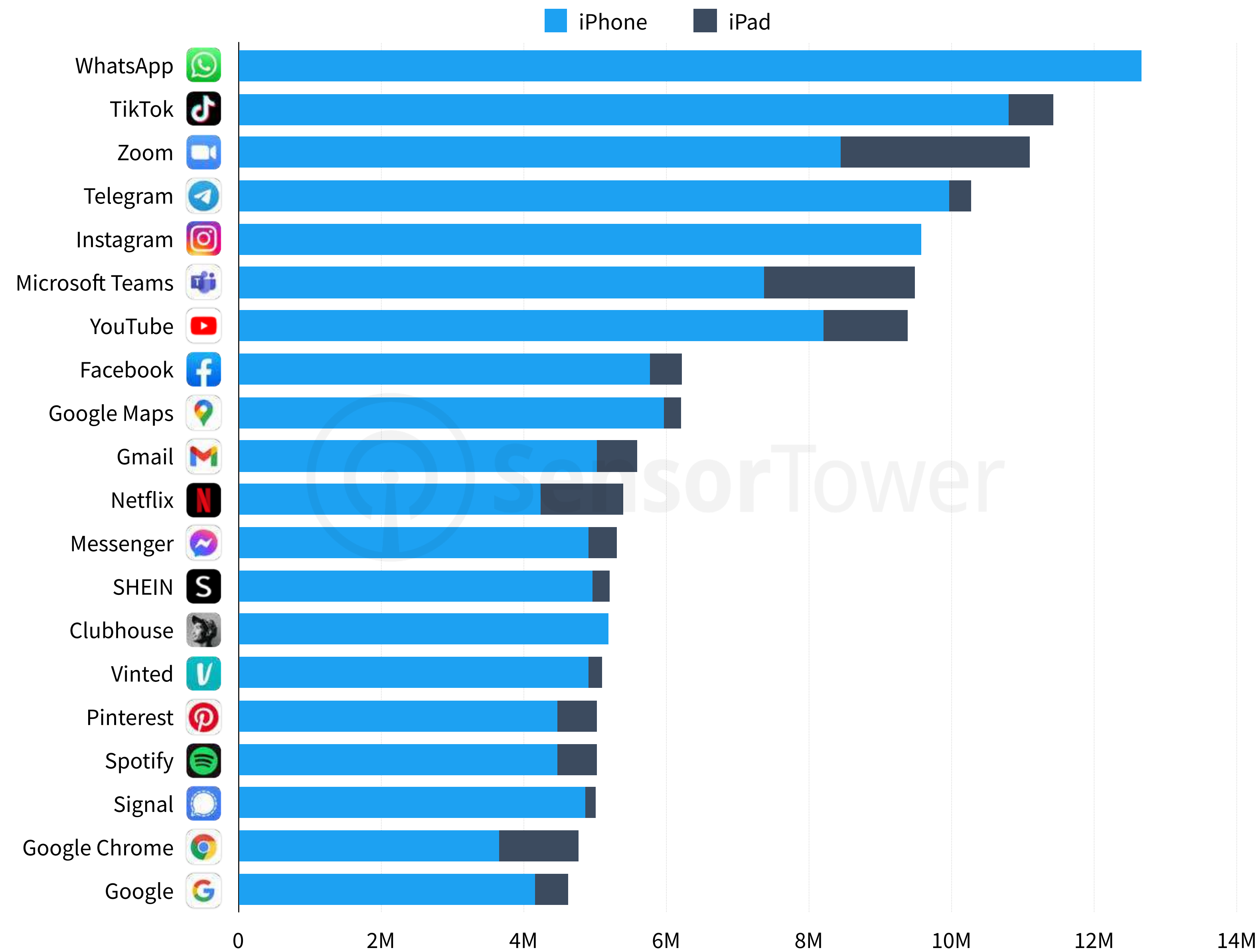
Telegram ranked No. 2 by downloads in Europe in Q1 2021, receiving 40 percent Q/Q growth to 27.3 million installs. Signal was also quite popular in Europe, surpassing 14 million downloads in the quarter.

Zoom and Microsoft Teams were still among the top apps in Europe a year into the pandemic. Video conferencing apps have continued to find success as many physical offices have remained closed or at limited capacity.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1 through Mar. 31, 2021. 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



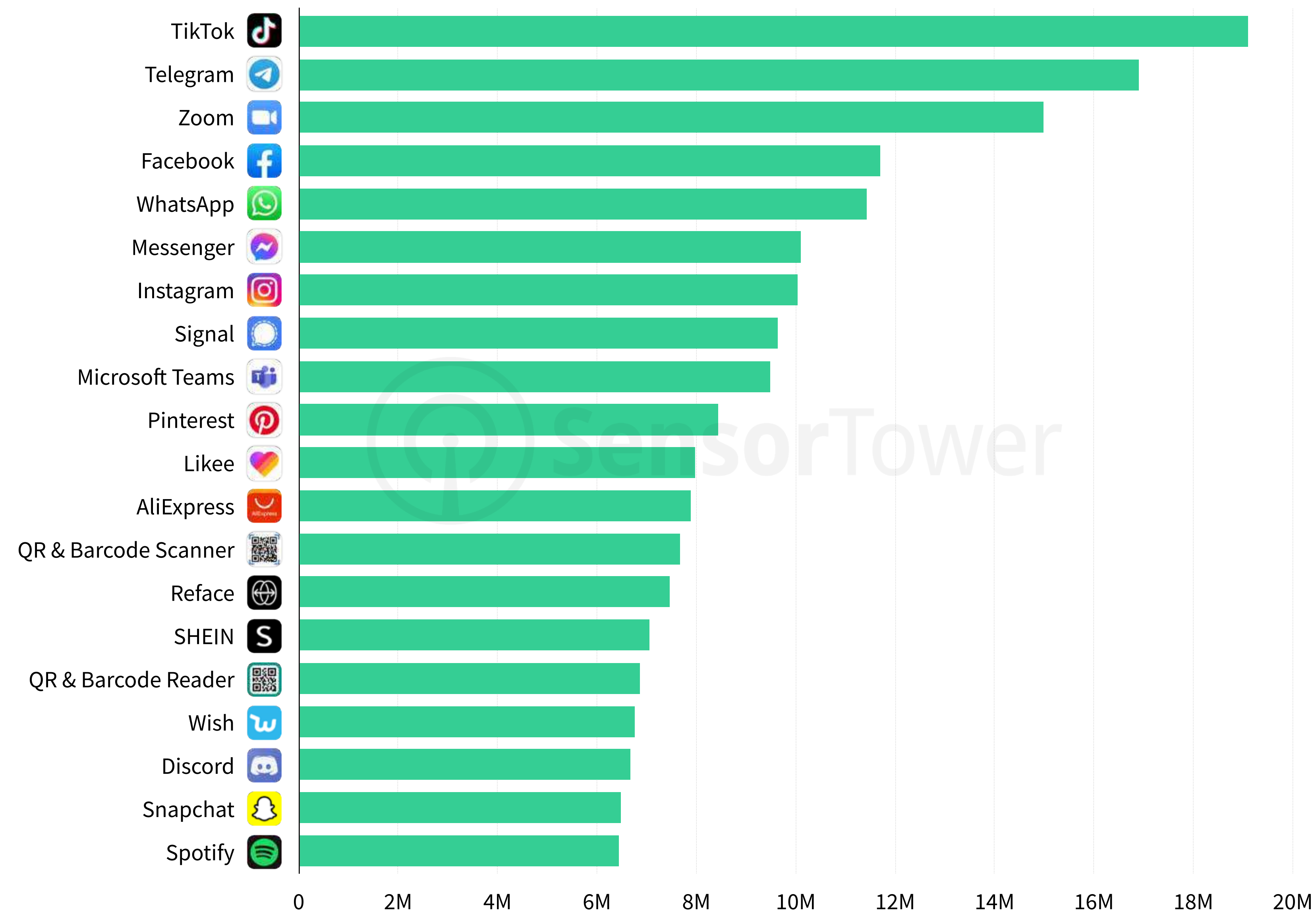
WhatsApp was the top app on the App Store across Europe, followed by TikTok and Zoom. Telegram, the No. 4 app, also surpassed 10 million installs in the quarter.

Nine of the top 10 apps in Q4 2020 returned to the top 10 this quarter. Google Maps replaced Messenger as the lone return entrant to the top 10 in Q1 2021.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Jan. 1 through Mar. 31, 2021. 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



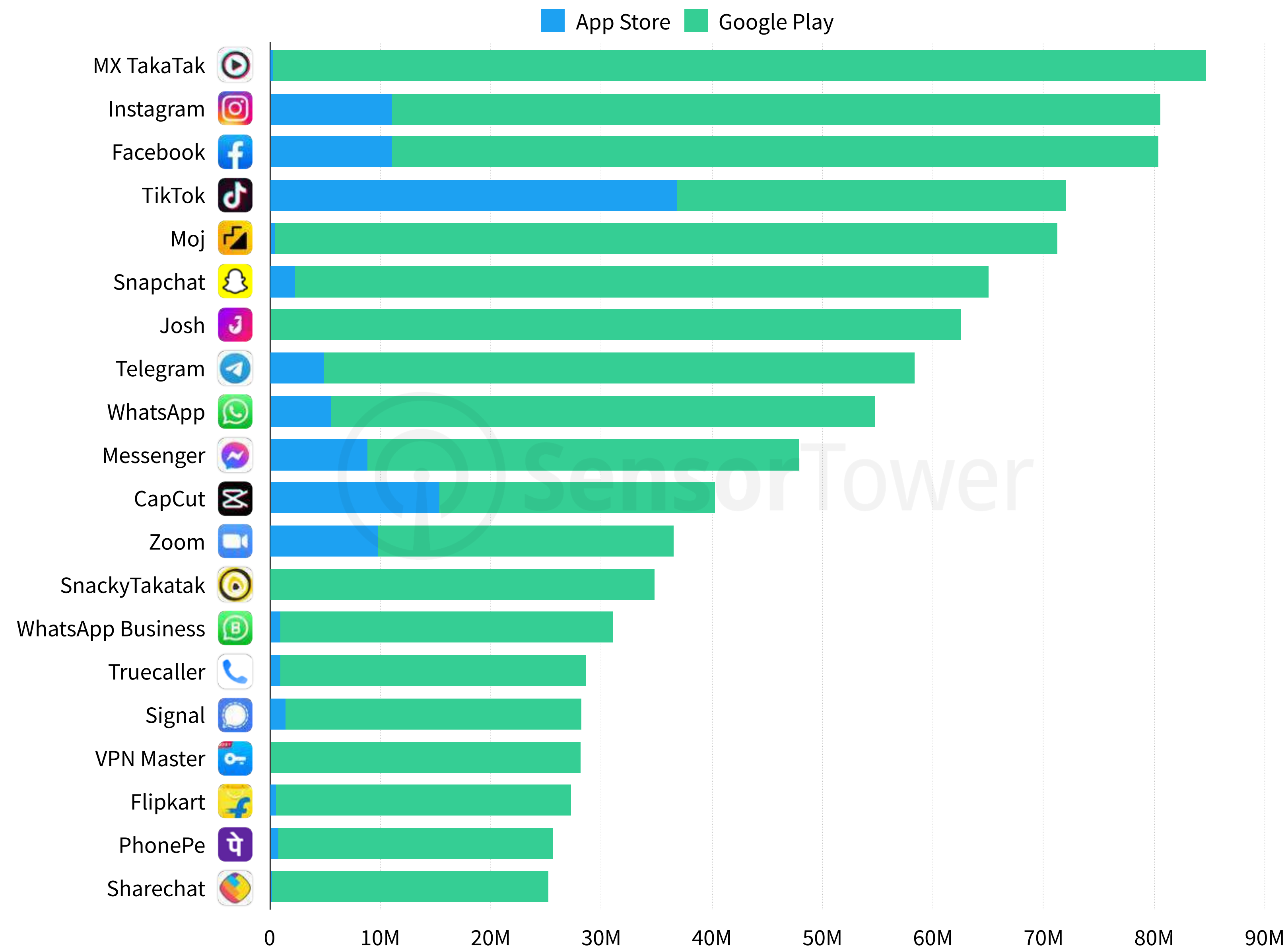
Secure messaging apps were especially popular on Google Play. Telegram ranked No. 2 with nearly 17 million Google Play downloads in Europe, and Signal joined it among the top 10 at No. 8.

A few shopping apps ranked among the top 20 in Q1 2020, including AliExpress, SHEIN, and Wish. SHEIN's Google Play installs in the region reached a new high at 7 million for the quarter.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for Google Play for Jan. 1 through Mar. 31, 2021. 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 - Asia



Many of the top apps in Asia were most popular on Google Play and in India.

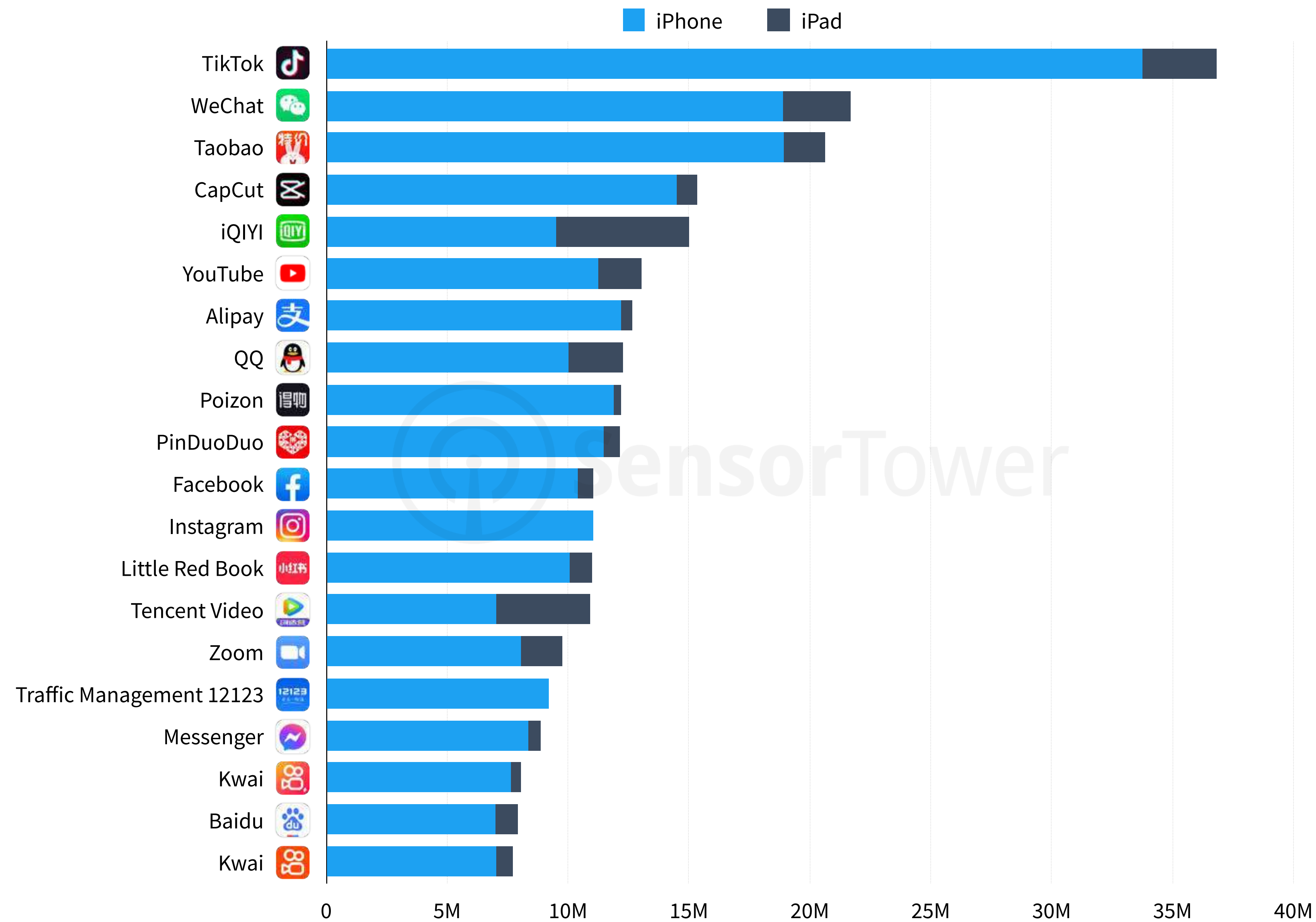
ByteDance's TikTok was the only app among the top 20 to have more App Store downloads than Google Play, and its app CapCut had the next highest share from the App Store.

Success in India propelled some short video apps towards the top of the rankings in Asia. MX TakaTak outpaced powerhouse apps like Instagram, Facebook, and TikTok.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1 through Mar. 31, 2021. 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 - Asia



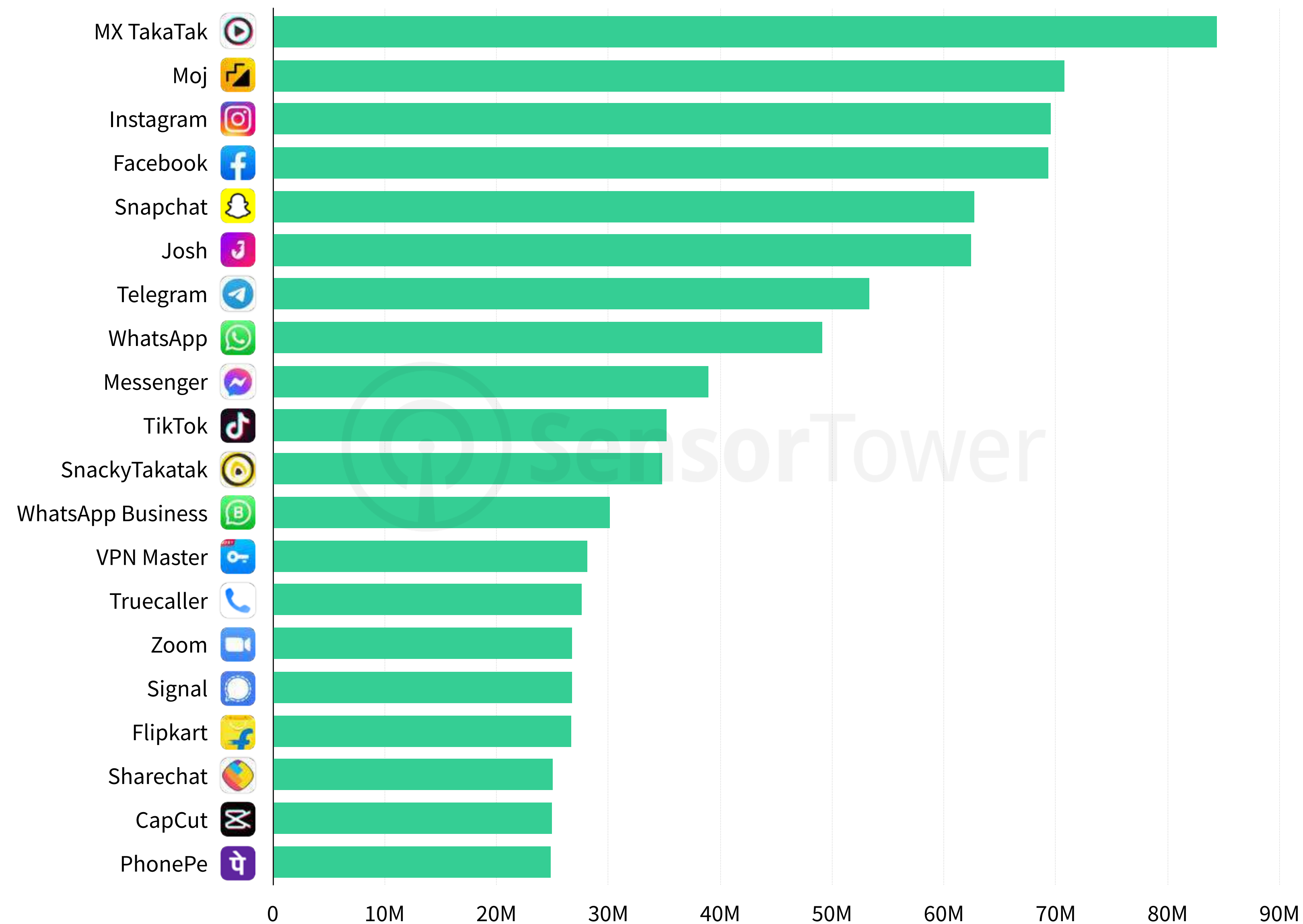
On the App Store, China was by far the largest market in Asia and many of the top apps were from Chinese publishers. TikTok, known as Douyin in China, had nearly 37 million downloads, well ahead of the No. 2 app WeChat at 22.7 million.

Poizon, a sneaker trading app, saw global installs climb from 8.8 million in Q4 2020 to 12.2 million in Q1 2021 and ranked among the top 10 App Store apps in Asia. Nearly all of its downloads were from China.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Jan. 1 through Mar. 31, 2021. 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 - Asia



India banned a number of apps from Chinese publishers in 2020, including TikTok and UC Browser. Short video alternatives to TikTok immediately began to emerge and have had lasting success. MX TakaTak and Moj were the top two apps in Asia on Google Play, and Josh also ranked among the top 10.

TikTok still managed to rank at No. 10. Its top Google Play markets in Asia were Indonesia, the Philippines, and Thailand.

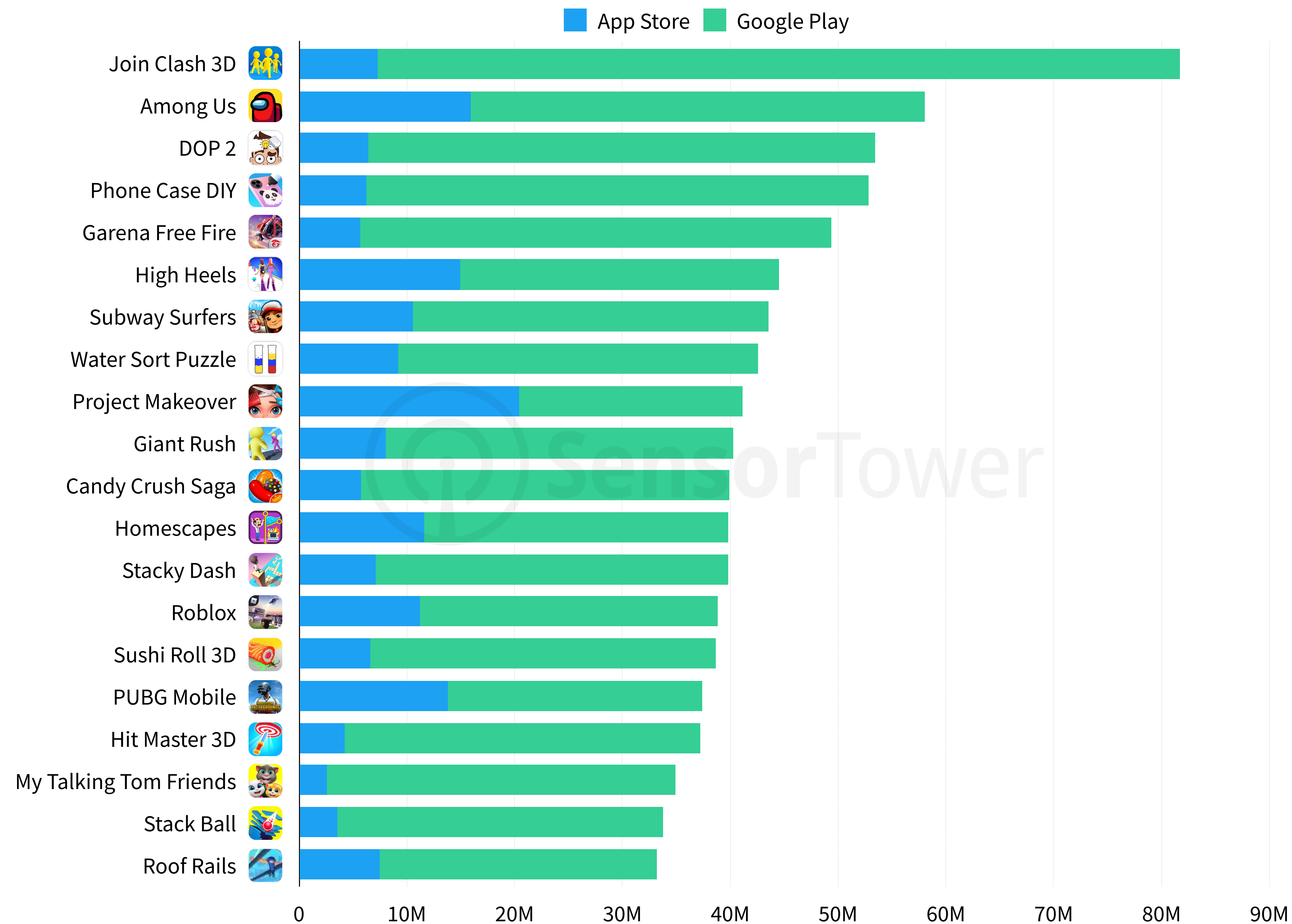
Note Regarding Download Estimates

Our estimates include worldwide daily download totals for Google Play for Jan. 1 through Mar. 31, 2021. 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 Games

Top Games by Downloads in Q1 2021

Overall - Worldwide



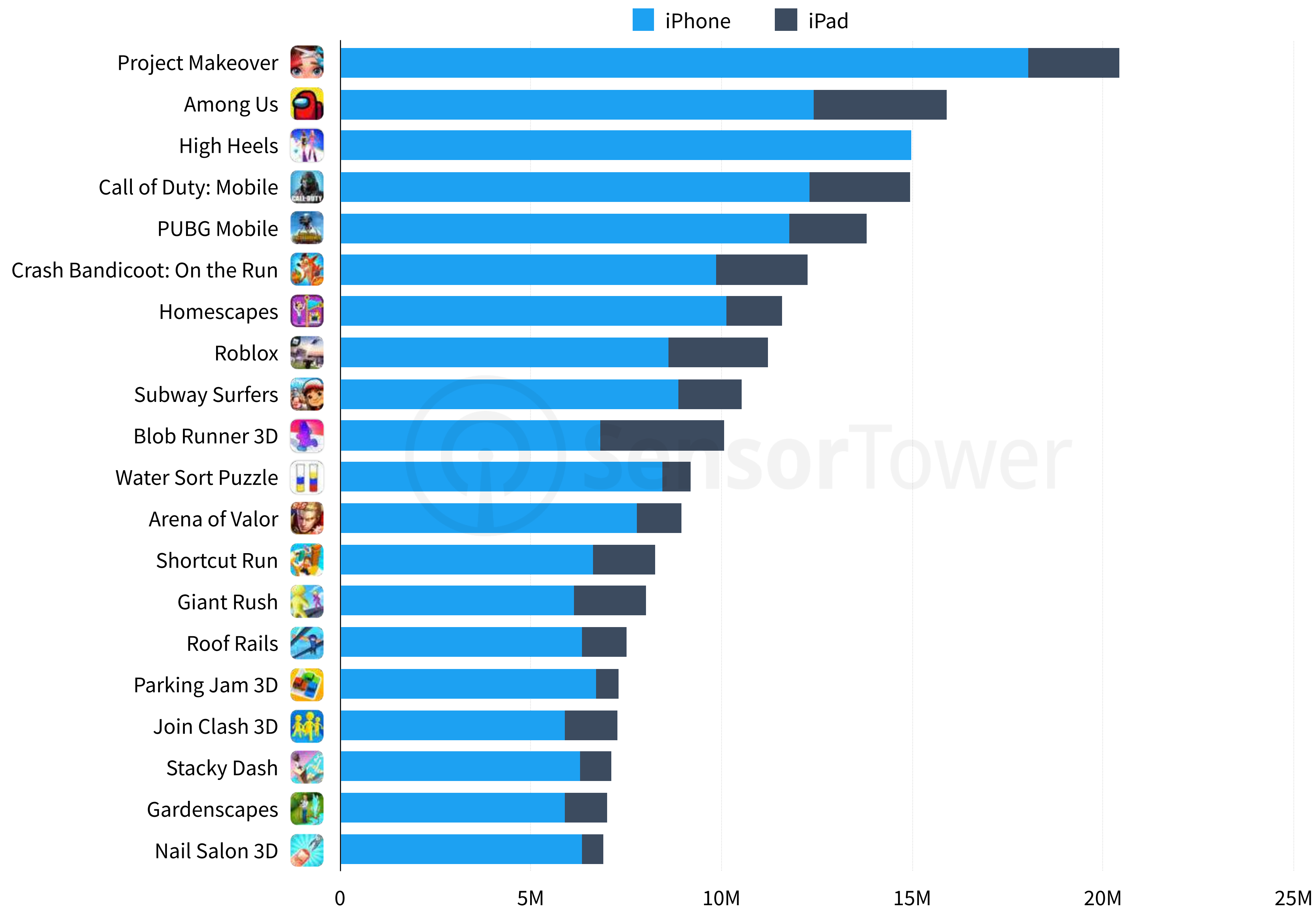
Join Clash 3D from Supersonic Studios was the top mobile game by worldwide downloads in Q1 2021. After two consecutive quarters in the top spot, Among Us fell to No. 2 last quarter.

Supersonic Studios was one of three hypercasual games publishers to have multiple apps in the top 20, along with Crazy Labs and Azur Interactive. Its second best performing game was Stacky Dash at No. 13.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1 through Mar. 31, 2021. 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



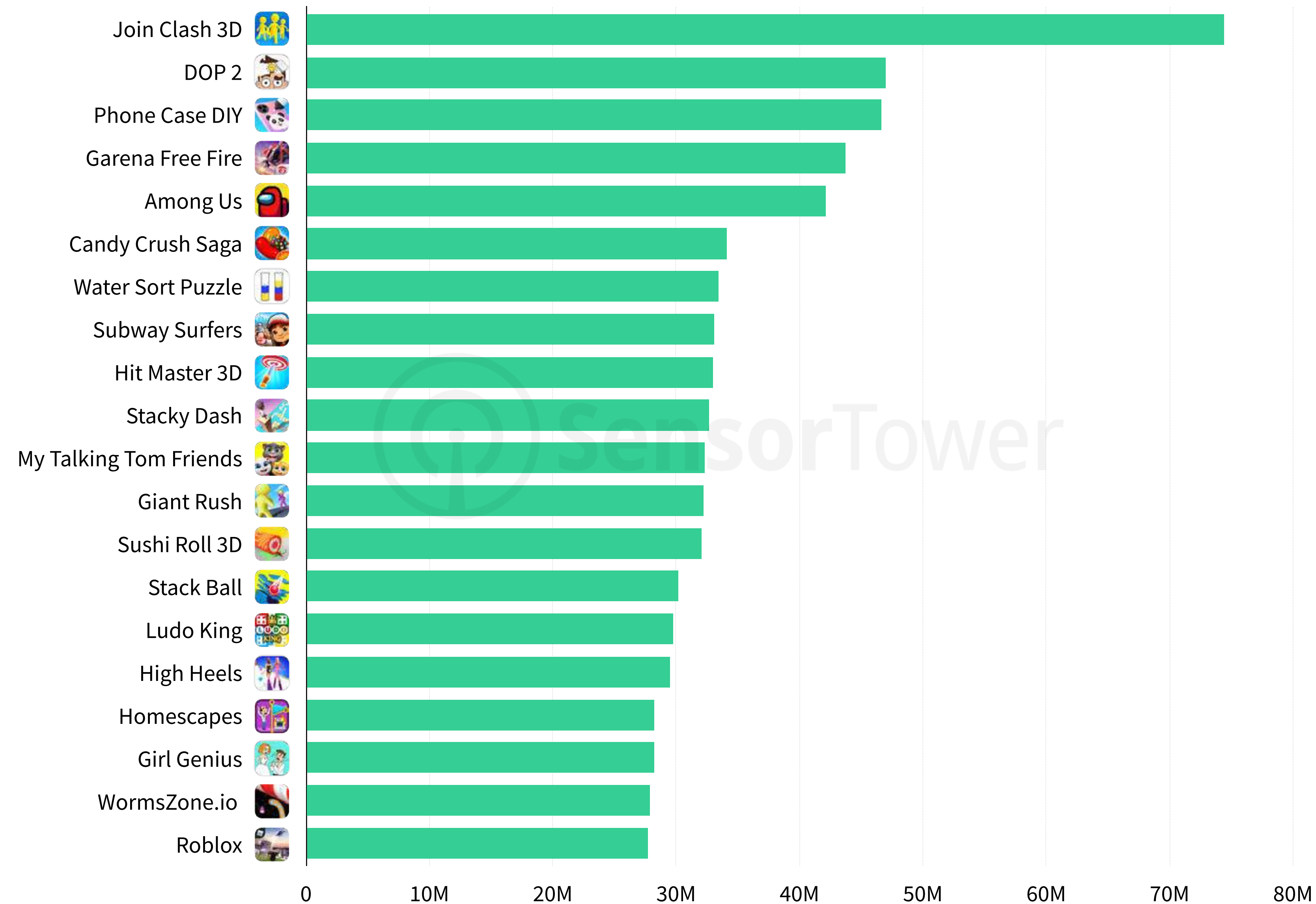
Project Makeover from Magic Tavern was the top game on the App Store, moving up four spots from Q4 2020. This was the second quarter in a row it was the top Puzzle & Decorate game on the App Store ahead of Playrix's hit games like Homescapes.

Crash Bandicoot: On the Run from King was a top 10 game despite not launching until the final days of the quarter. It surpassed 12 million downloads after being launched in late March.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Jan. 1 through Mar. 31, 2021. 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



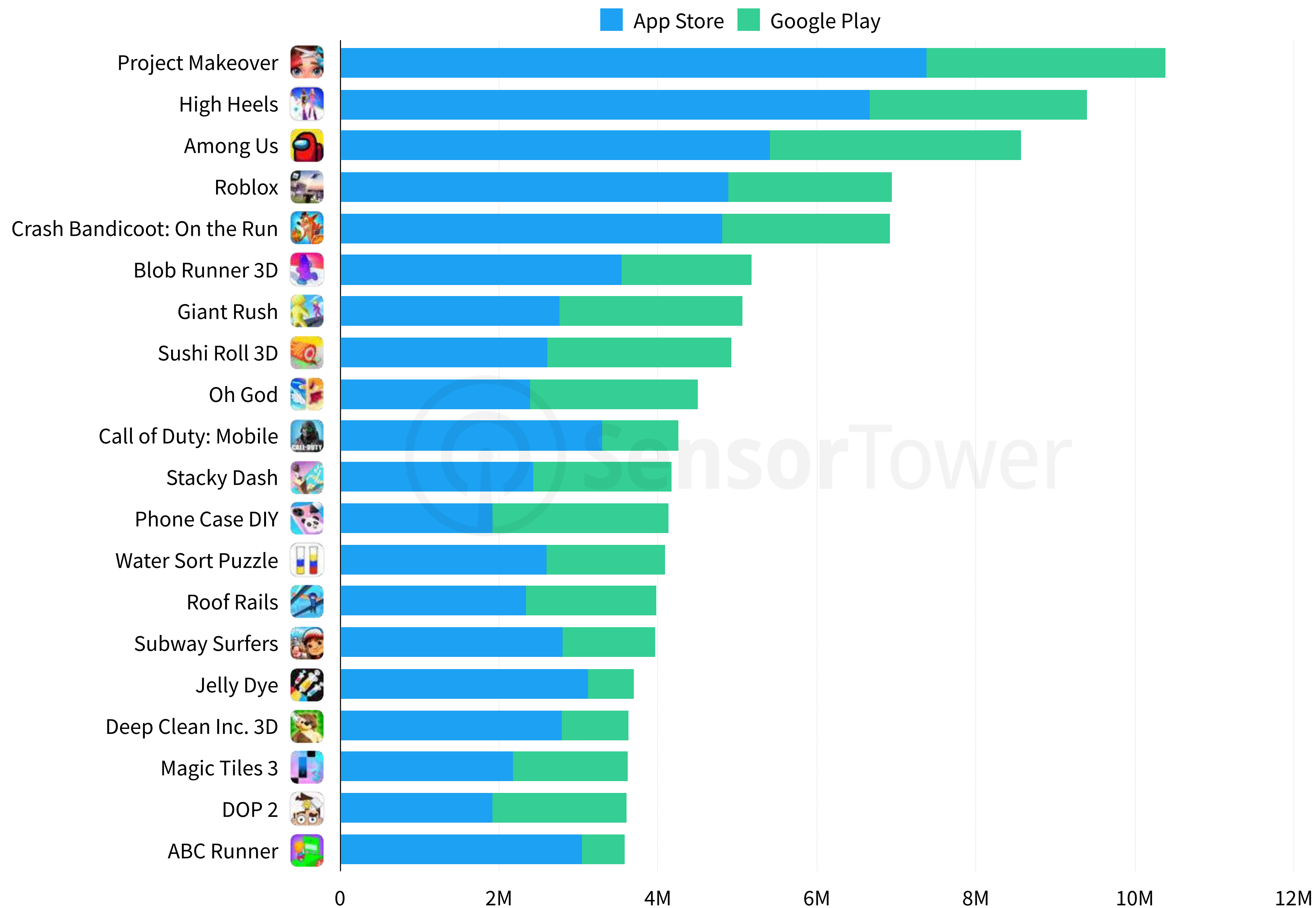
Three of the top five apps in Q4 2020 returned in Q1 2021, including Join Clash 3D, Garena Free Fire, and Among Us. Two new hypercasual games, DOP 2 and Phone Case DIY joined the top five.

More than half of the top games were in the Hypercasual genre. The Arcade and Puzzle genres were each represented by two of the top 20 games.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for Google Play for Jan. 1 through Mar. 31, 2021. 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



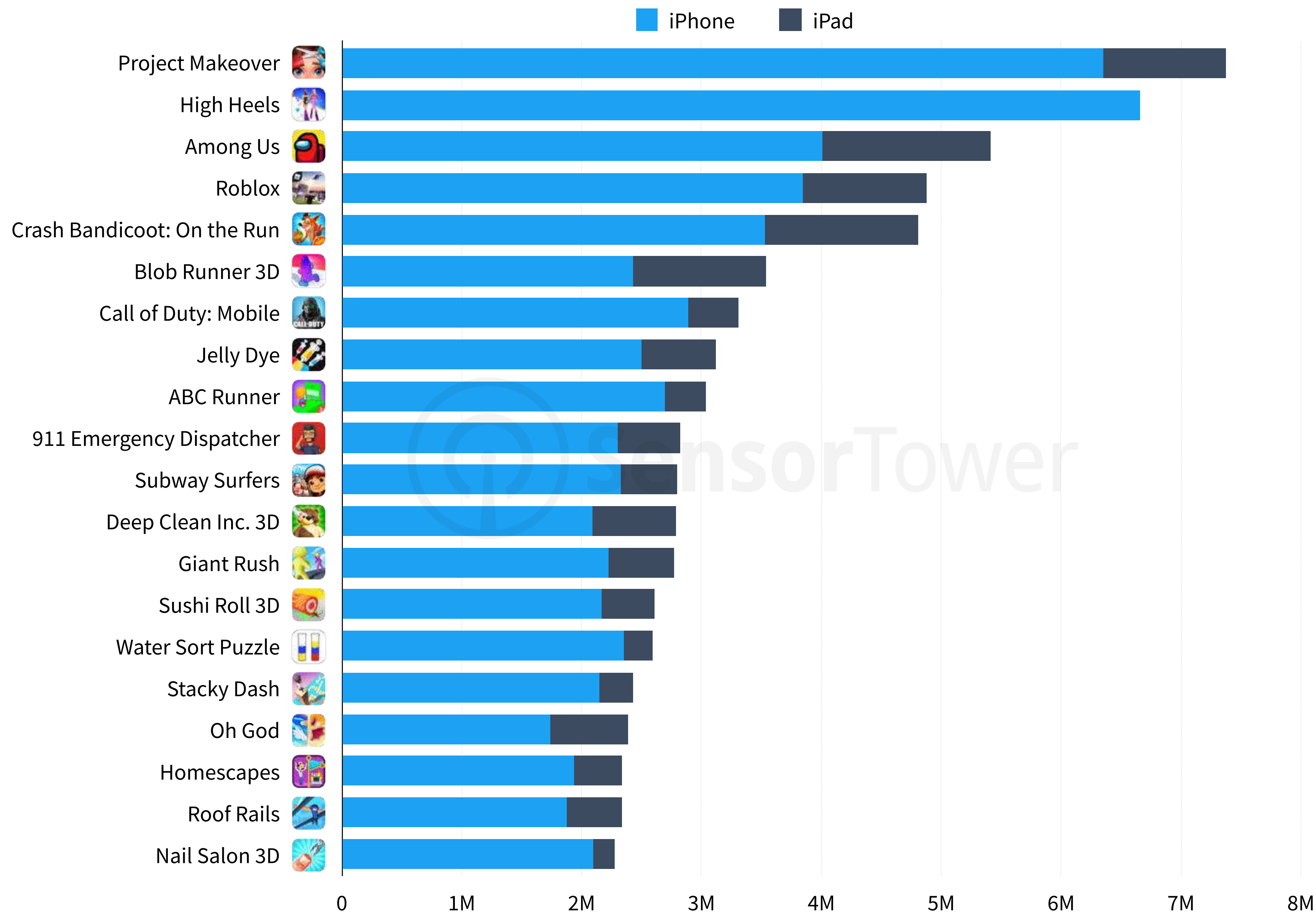
Crash Bandicoot: On the Run had a huge launch in the U.S. in late March. The U.S. accounted for 26 percent of its worldwide installs, good enough for it to rank No. 5 in the U.S. for the quarter.

Roblox's popularity surged in the U.S. at the start of the pandemic. It ranked among the top five apps by U.S. downloads for the fourth consecutive quarter in Q1 2021.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1 through Mar. 31, 2021. 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



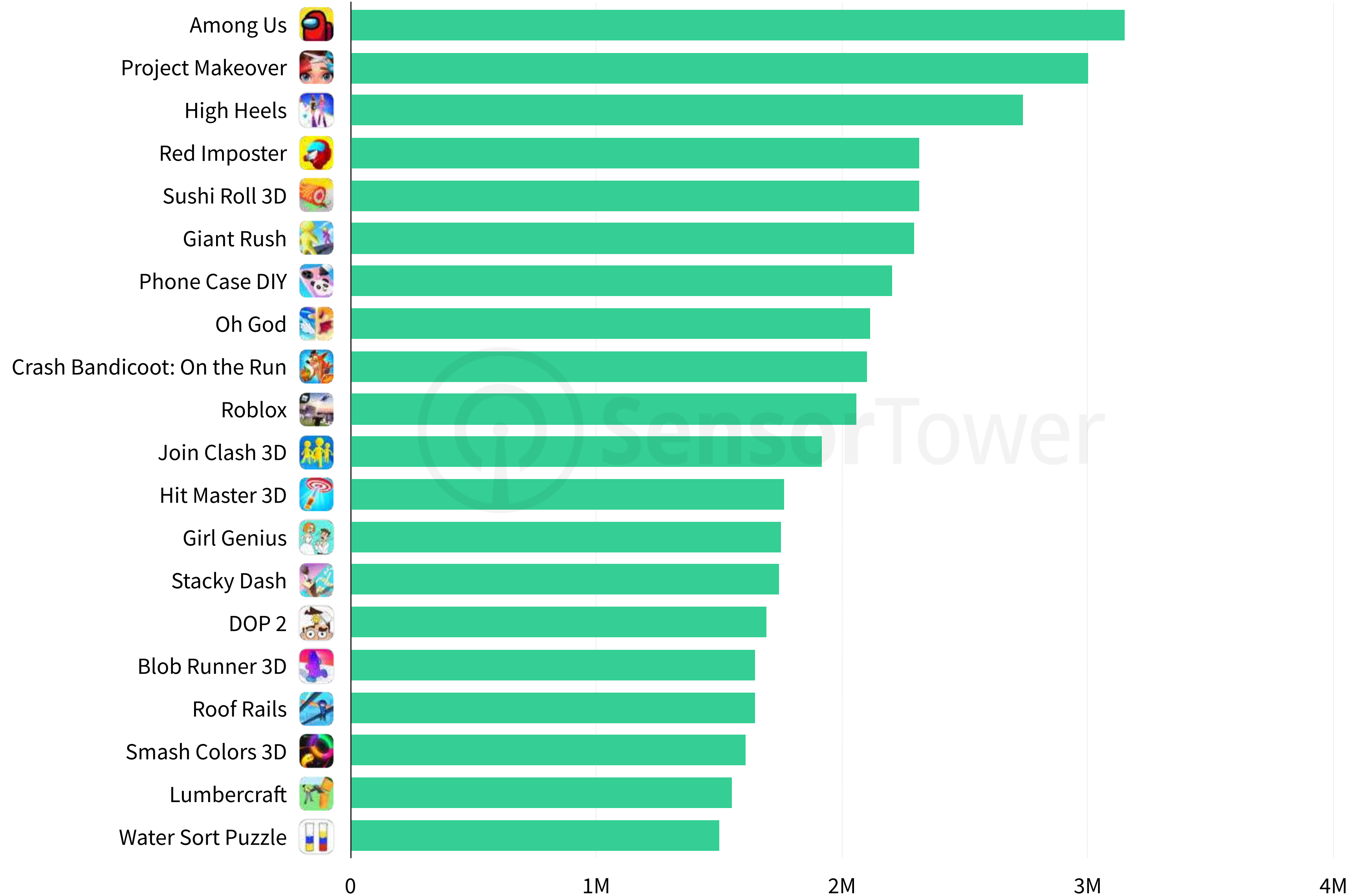
Project Makeover was the top game on the App Store worldwide, in the U.S., and in Europe. It was an immediate success following its launch in November 2020.

Zynga had two of the top 10 games on the App Store, with High Heels at No. 2 and Blob Runner 3D at No. 6. Zynga expanded into the hypercasual games space with its acquisition of Rollic Games in late 2020.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Jan. 1 through Mar. 31, 2021. 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



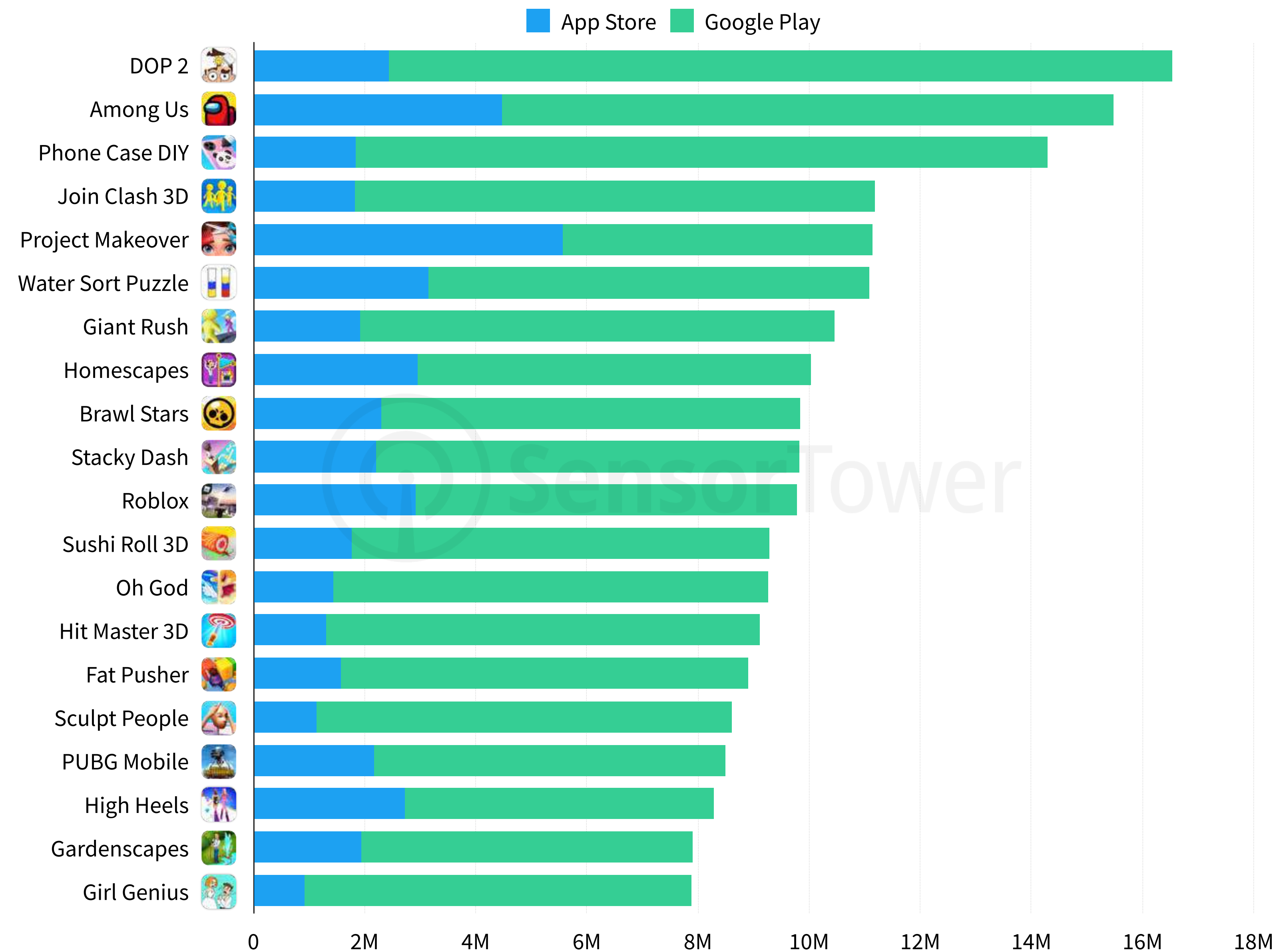
Among Us from InnerSloth has held the top spot on Google Play for the last three quarters. The game, launched in 2018, took off during the pandemic with the help from influencers on YouTube and Twitch.

80 percent of the top 20 games were hypercasual titles, although the top two games made up half of the exceptions. The only other non-Hypercasual genre games were Crash Bandicoot: On the Run (Arcade) and Roblox (Simulation).

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for Google Play for Jan. 1 through Mar. 31, 2021. 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



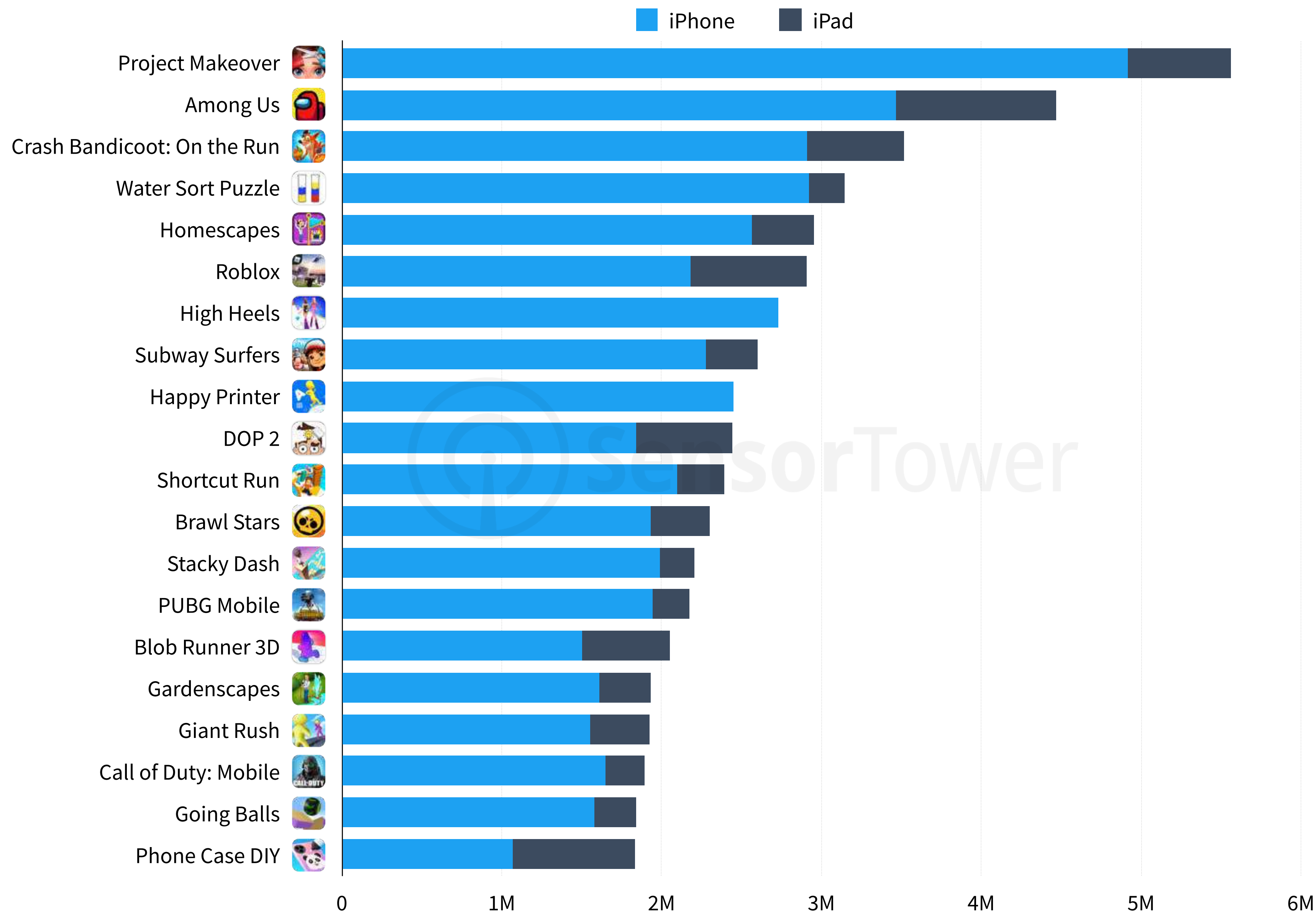
Draw One Part (DOP) 2 from the Belarus-based publisher Say Games was the top game in Europe in Q1 2021. Say Games also had the No. 13 title, Sushi Roll 3D.

Supercell's Brawl Stars continued to be popular in Europe, ranking among the top 10 again in Q1 2021. Europe accounted for 47 percent of Brawl Stars installs to date.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1 through Mar. 31, 2021. 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



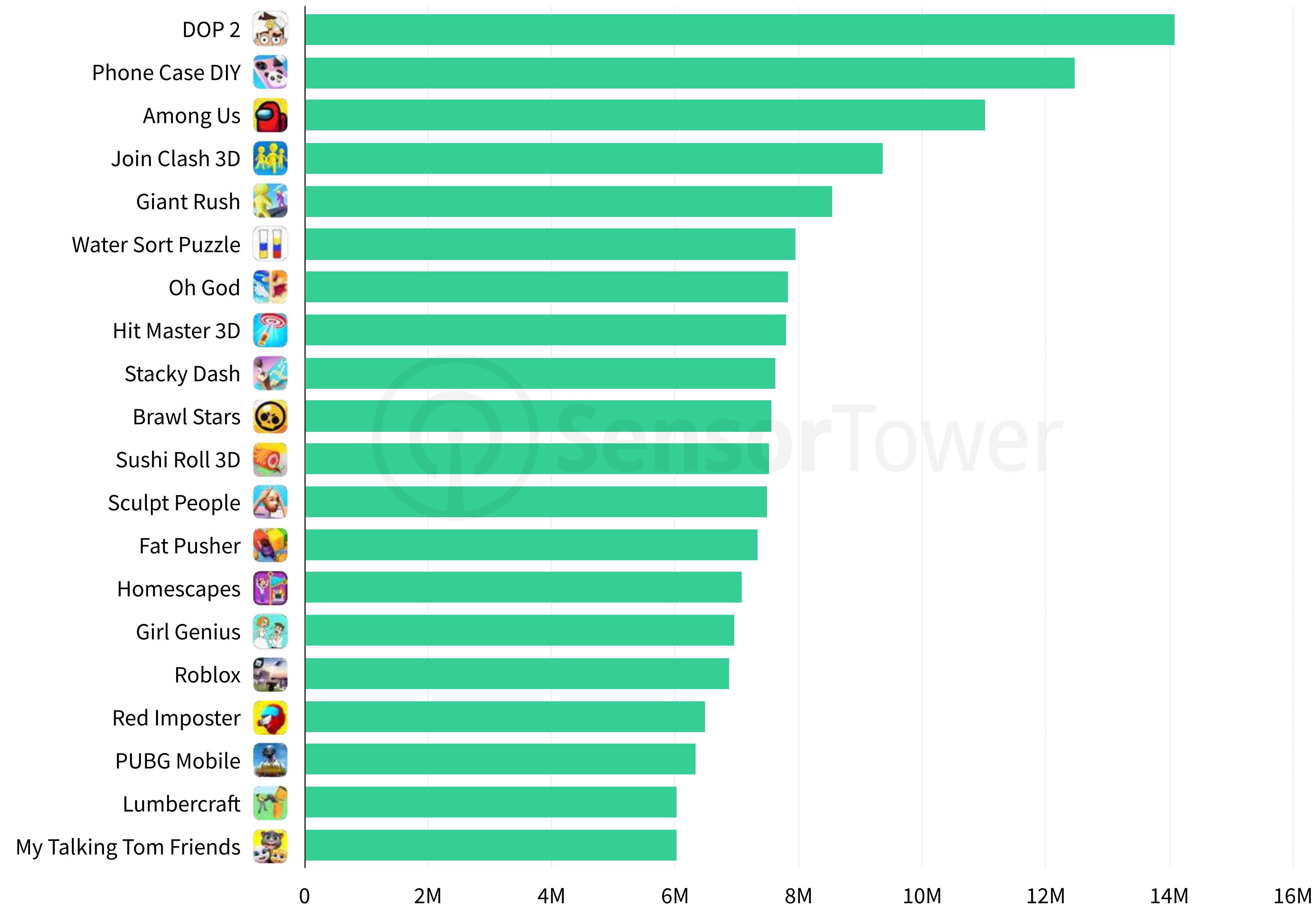
Puzzle & Decorate games performed well on the App Store in Europe, with Project Makeover leading the way on more than 5.5 million downloads. Playrix had two Puzzle & Decorate genre games among the top 20 with Homescapes and Gardenscapes.

Crash Bandicoot: On the Run had a strong launch in Europe as well as the U.S. It ranked as the No. 3 App Store game behind only Project Makeover and Among Us.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Jan. 1 through Mar. 31, 2021. 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



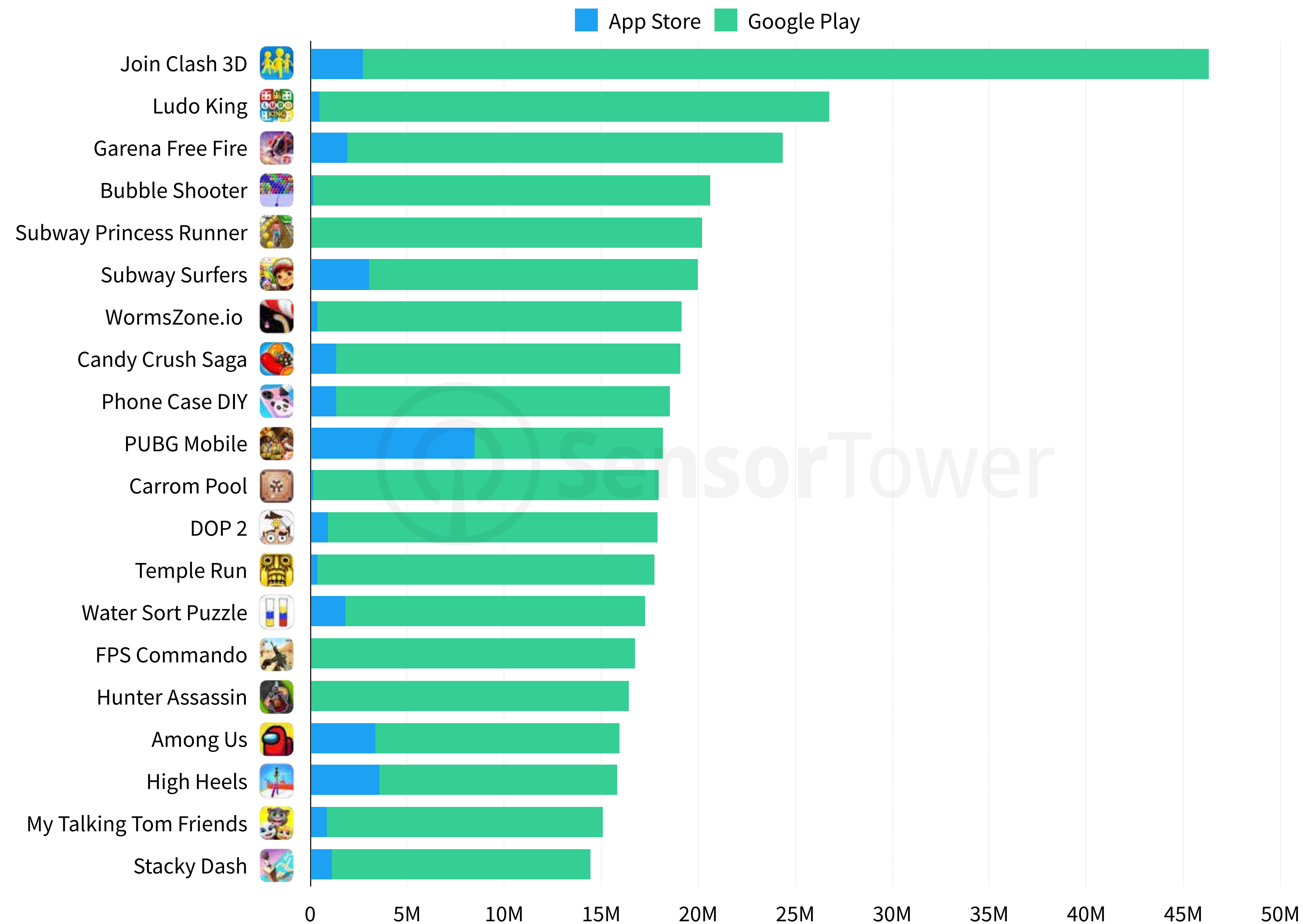
The top 10 on Google Play was dominated by hypercasual games, with only Among Us and Brawl Stars representing other game genres. The hypercasual space was also extremely competitive, with seven different publishers accounting for the eight hypercasual games among the top 10.

PUBG Mobile was the top Shooter genre game on Google Play. 44 percent of its Google Play downloads in Europe were from Turkey, followed by Russia at 26 percent.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for Google Play for Jan. 1 through Mar. 31, 2021. 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 - Asia



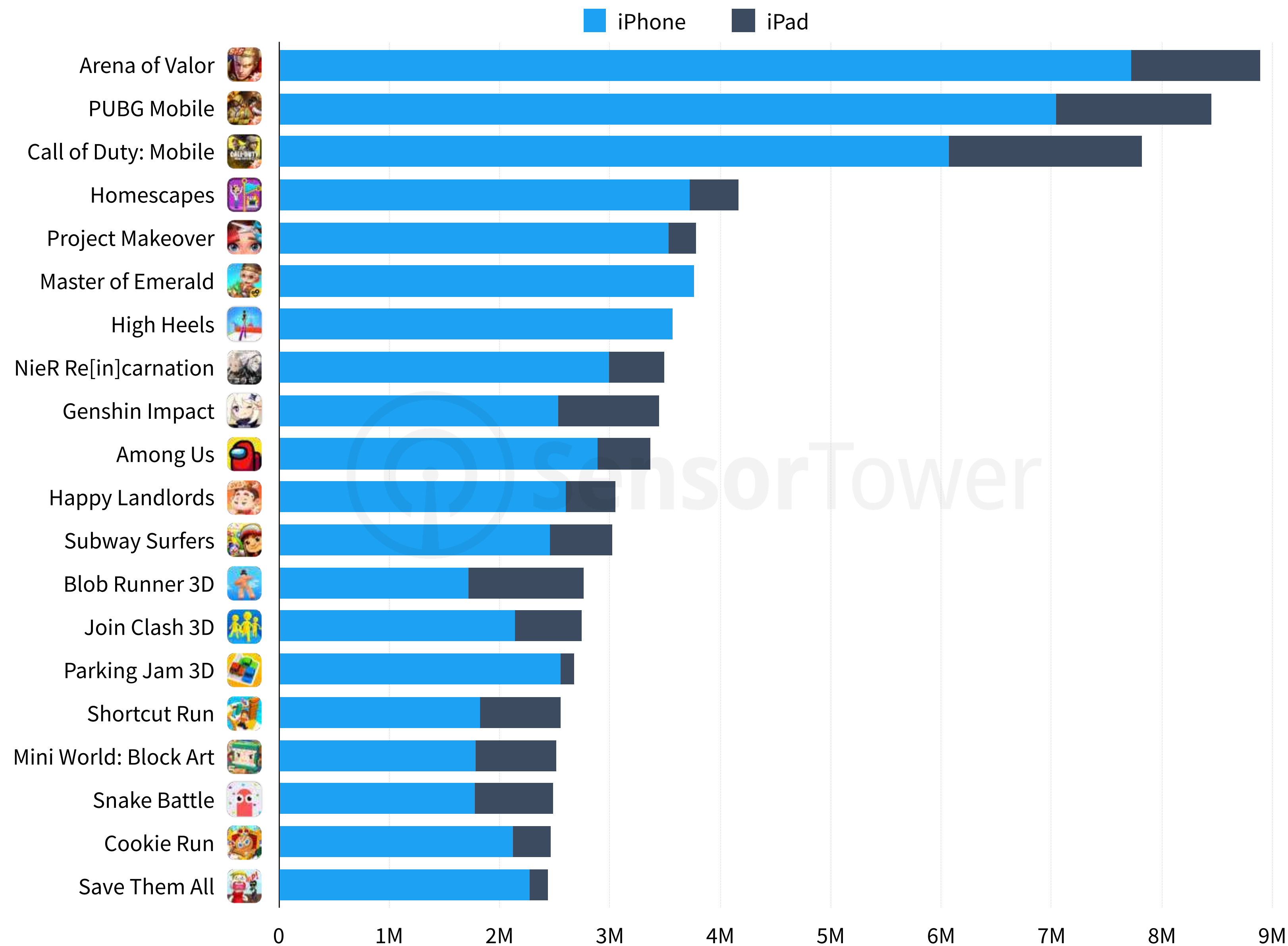
Join Clash 3D was the top game in Asia, well ahead of the No. 2 title Ludo King. 37 percent of Join Clash 3D's global installs were from India.

Similar to the top apps charts, the top games in Asia were led by titles most popular on Google Play. None of the top 20 games had more App Store downloads than Google Play, although PUBG Mobile was closest due to its popularity in China where it is known as Game for Peace.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1 through Mar. 31, 2021. 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 - Asia



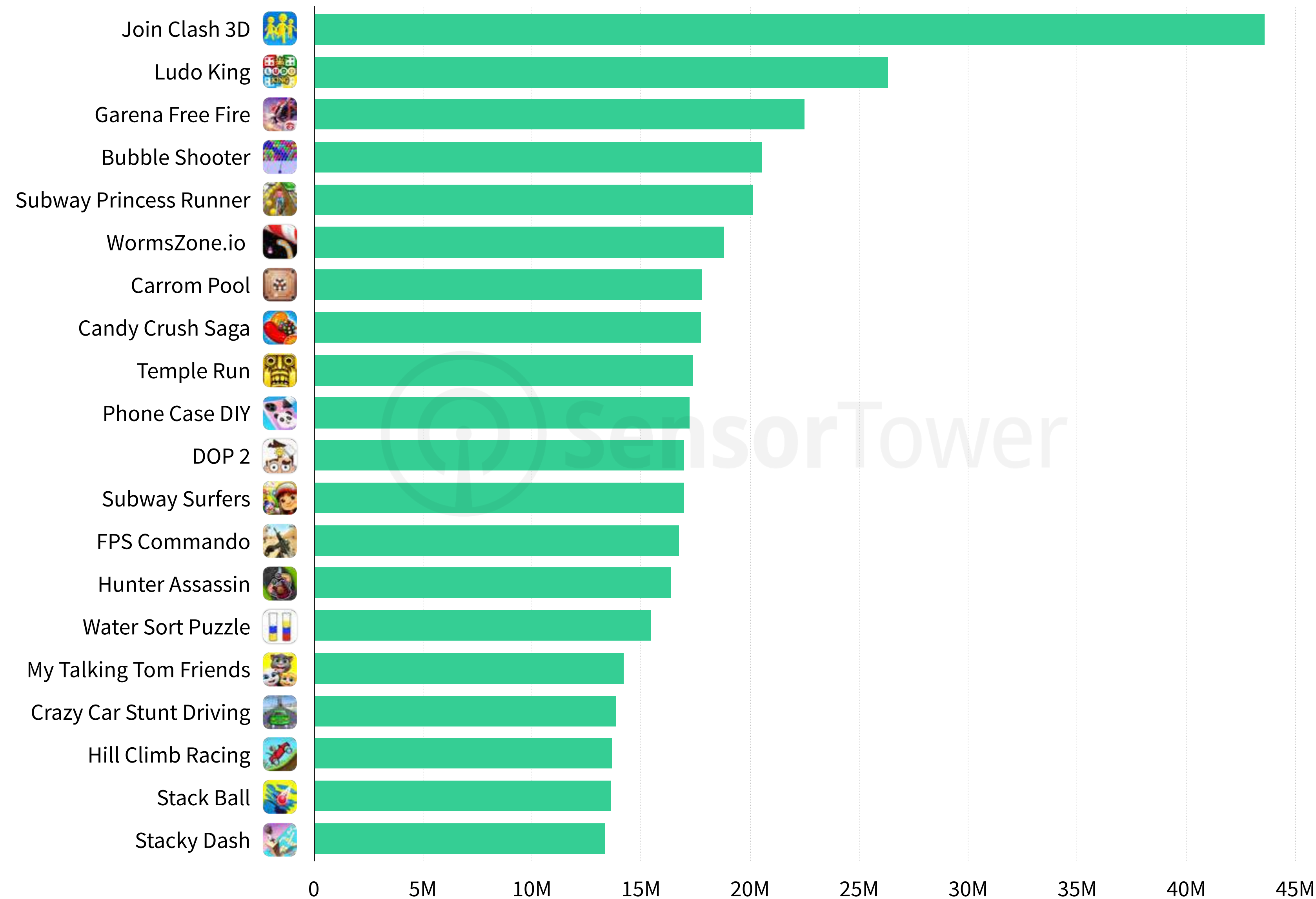
The top three games on the App Store were hugely popular titles in China. 77 percent of their combined Asia downloads in the quarter were from China. All three games were published by Tencent in China as well.

There was a large gap between the top three games and the rest. Call of Duty: Mobile had nearly 3.7 million downloads more than the No. 4 game, Homescapes.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Jan. 1 through Mar. 31, 2021. 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 - Asia



Join Clash 3D was the top games globally on Google Play, with Asia leading the way.

It was the No. 4 game on Google Play in Europe and No. 11 in the U.S.

Asia had fewer Hypercasual games among the top 20 on Google Play than the U.S. and Europe, though most games were still Casual games.

Garena Free Fire and FPS Commando were the only mid-core games among the top 20 in Q1 2021.

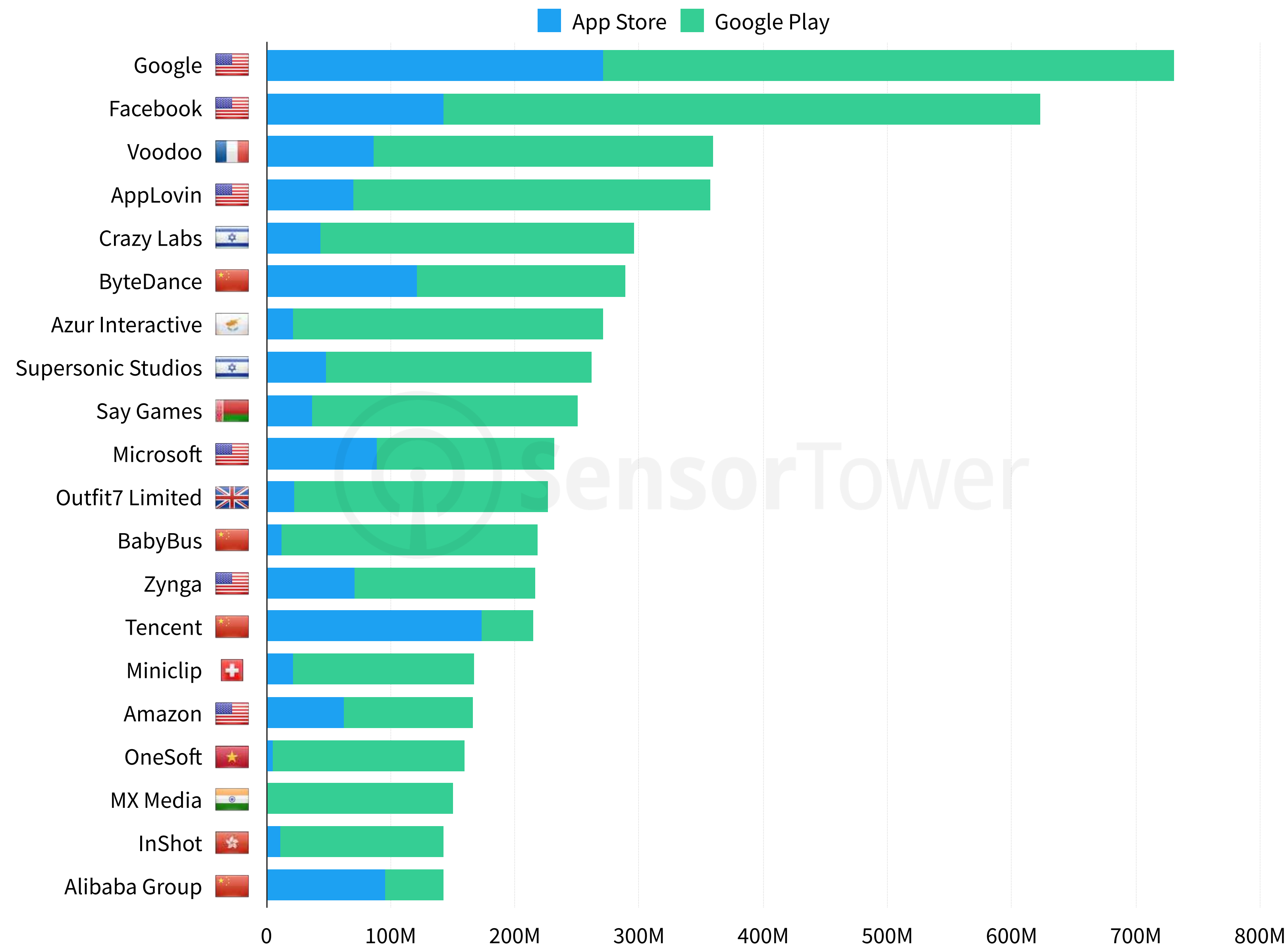
Note Regarding Download Estimates

Our estimates include worldwide daily download totals for Google Play for Jan. 1 through Mar. 31, 2021. We report unique installs only (one download per User). Google preinstalled apps are excluded. Android download estimates do not include third-party stores. Figures represent aggregate installs of all app versions, ex: Facebook and Facebook Lite.

Top Publishers

Top Publishers by Downloads in Q1 2021

Overall - Worldwide



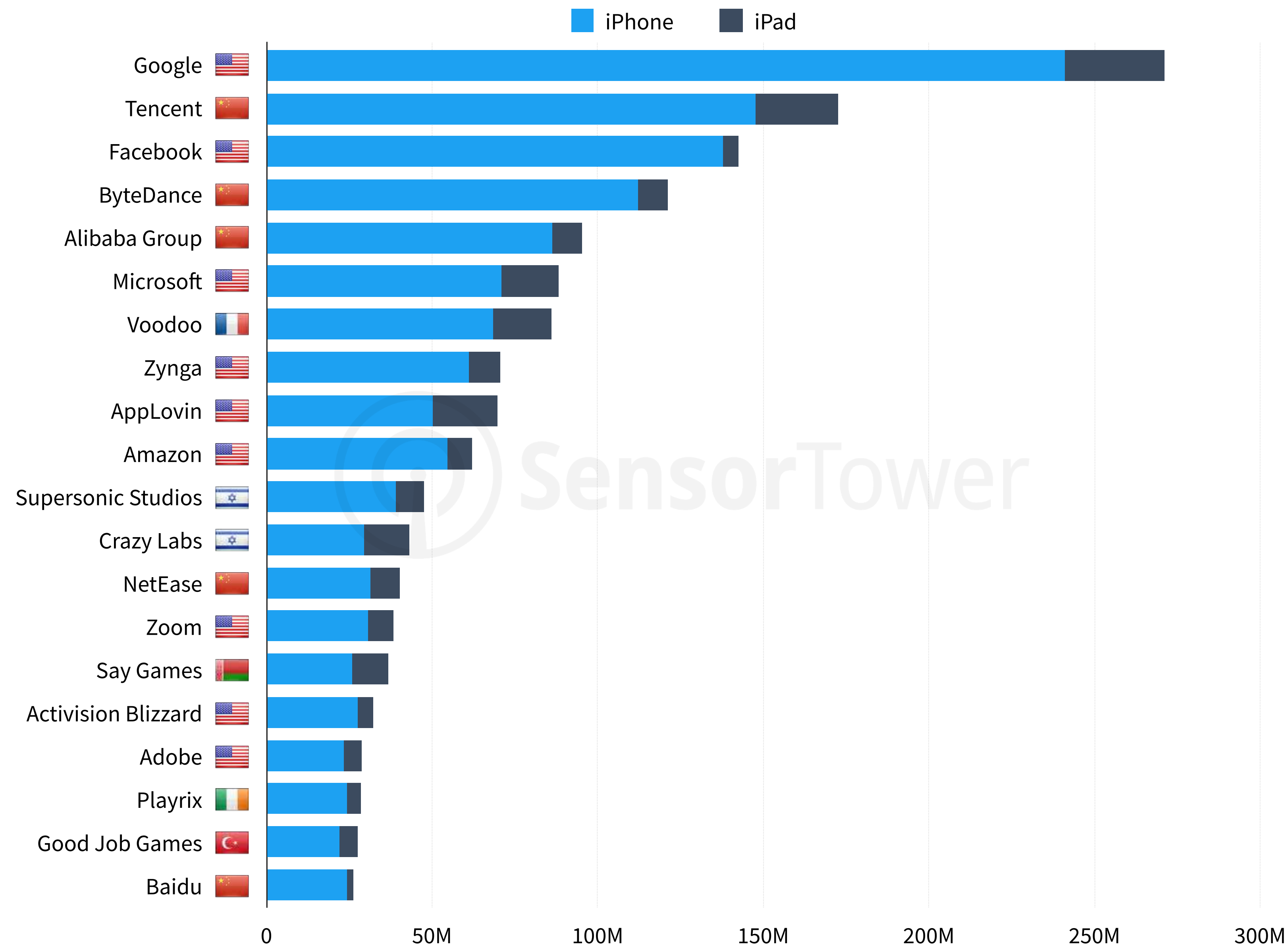
Google was the top publisher for the fourth consecutive quarter. The gap between Google and Facebook narrowed to the closest it's been since Google surpassed Facebook in Q2 2020 at 107 million.

Publishers focusing on hypercasual games rounded out the top five, including Voodoo, AppLovin, and Crazy Labs. Supersonic Studios also entered the top 10 for the first time.

Note Regarding Download Estimates

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

App Store - Worldwide



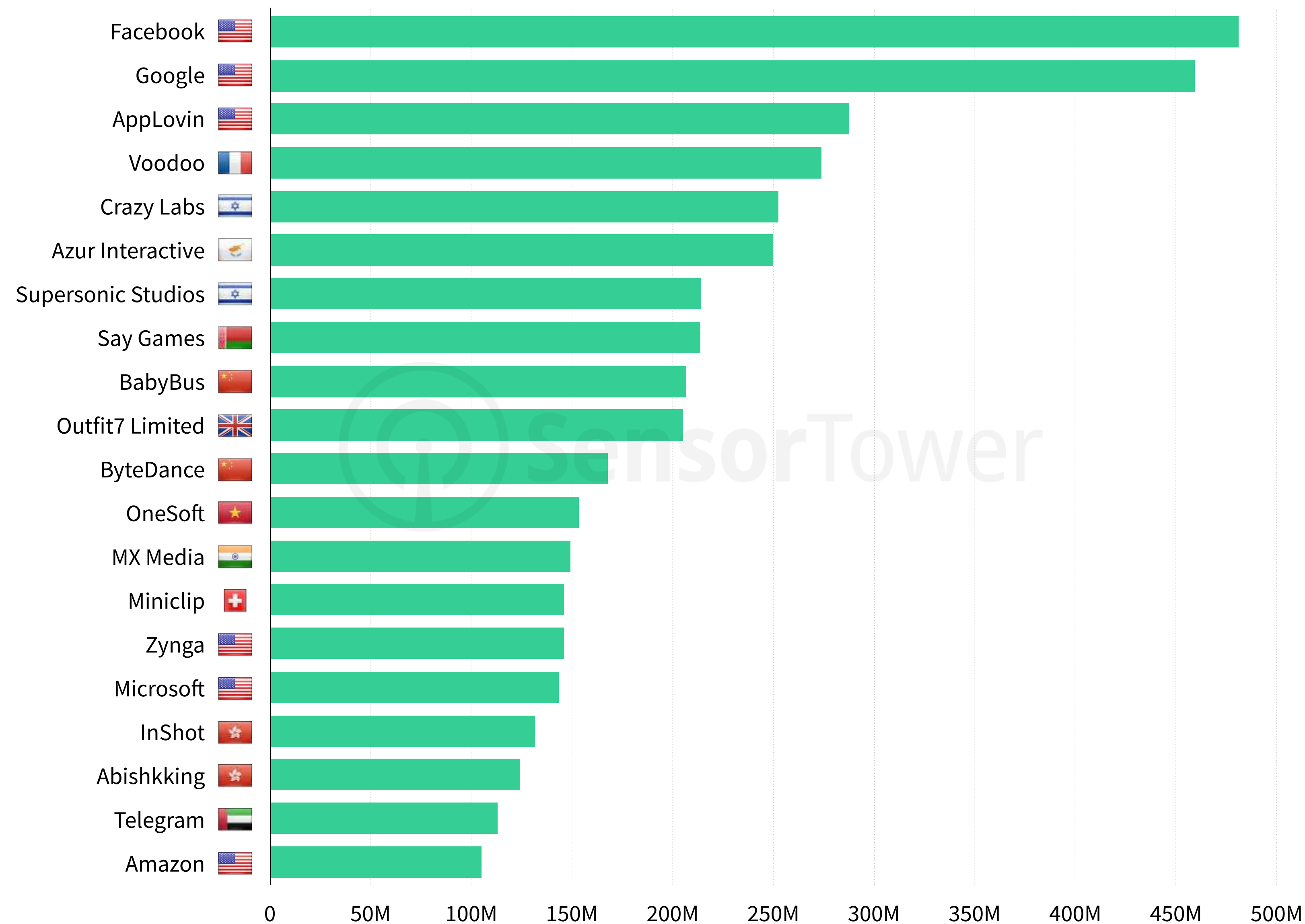
Top publishers on the App Store were mostly from the U.S. and China, with France-based Voodoo as the only top 10 company not headquartered in those countries. The U.S. had nine publishers in the top 20 and China had five.

ByteDance moved up three spots from Q4 2020 to rank No. 4 in Q1 2021. The rise of video-editing app CapCut into the top 10 App Store apps for the quarter helped boost its downloads, along with the No. 1 app, TikTok.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Jan. 1 through Mar. 31, 2021. Apple apps are excluded. We report unique installs only (one download per User).

Google Play - Worldwide



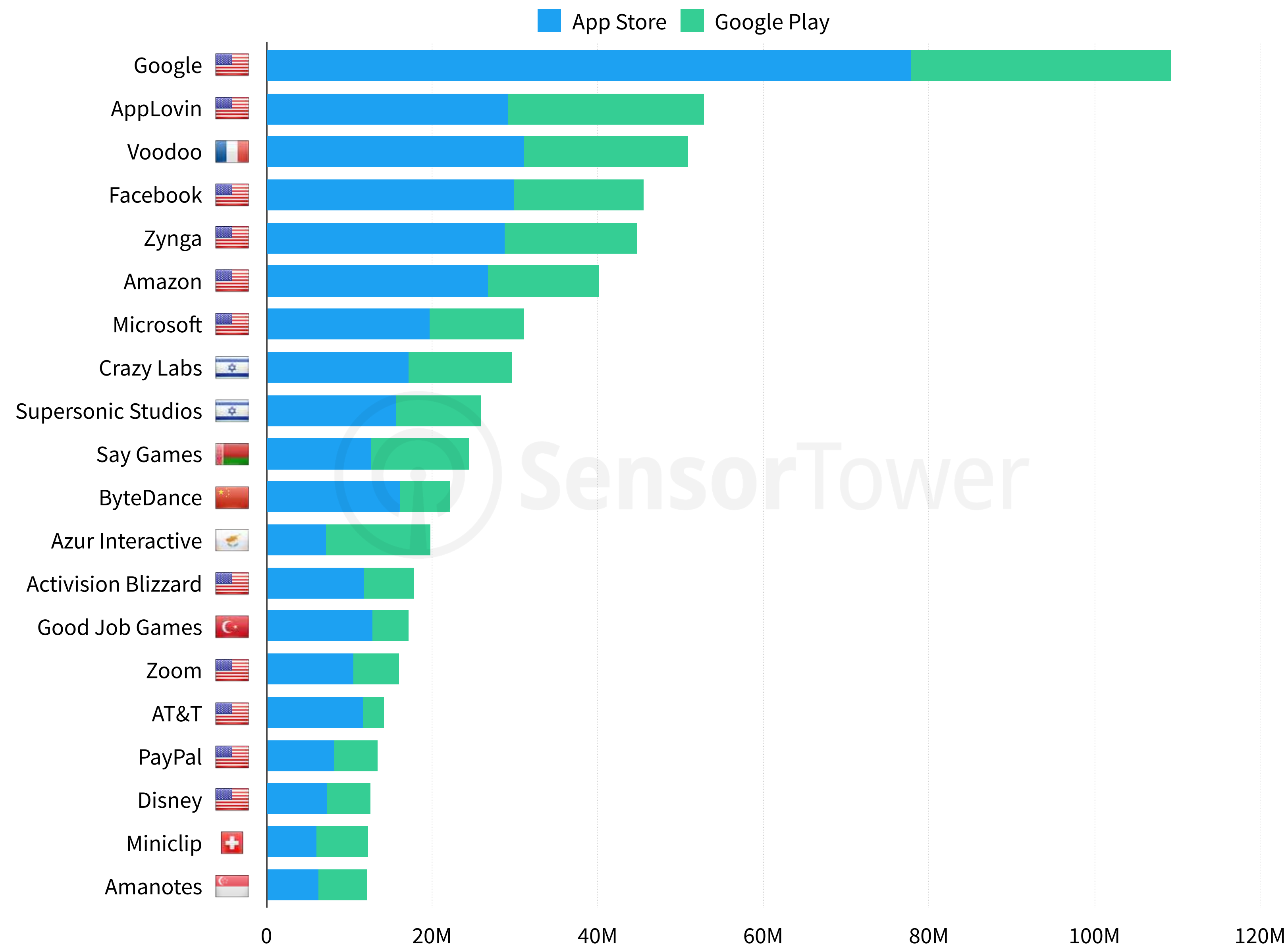
Facebook passed Google to take the top spot on Google Play for the first quarter since Q1 2020. Both publishers surpassed 450 million downloads on the platform for the seventh straight quarter.

A handful of hypercasual game publishers were among the top 10, including two Israel-based publishers, Crazy Labs and Supersonic Studios. Crazy Labs installs climbed 80 million Q/Q, while Supersonic Studios saw downloads grow by 50 million.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for Google Play for Jan. 1 through Mar. 31, 2021. 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



Google had more than twice as many U.S. downloads as any other publisher in Q1 2021. It was its seventh straight quarter where it surpassed 100 million installs.

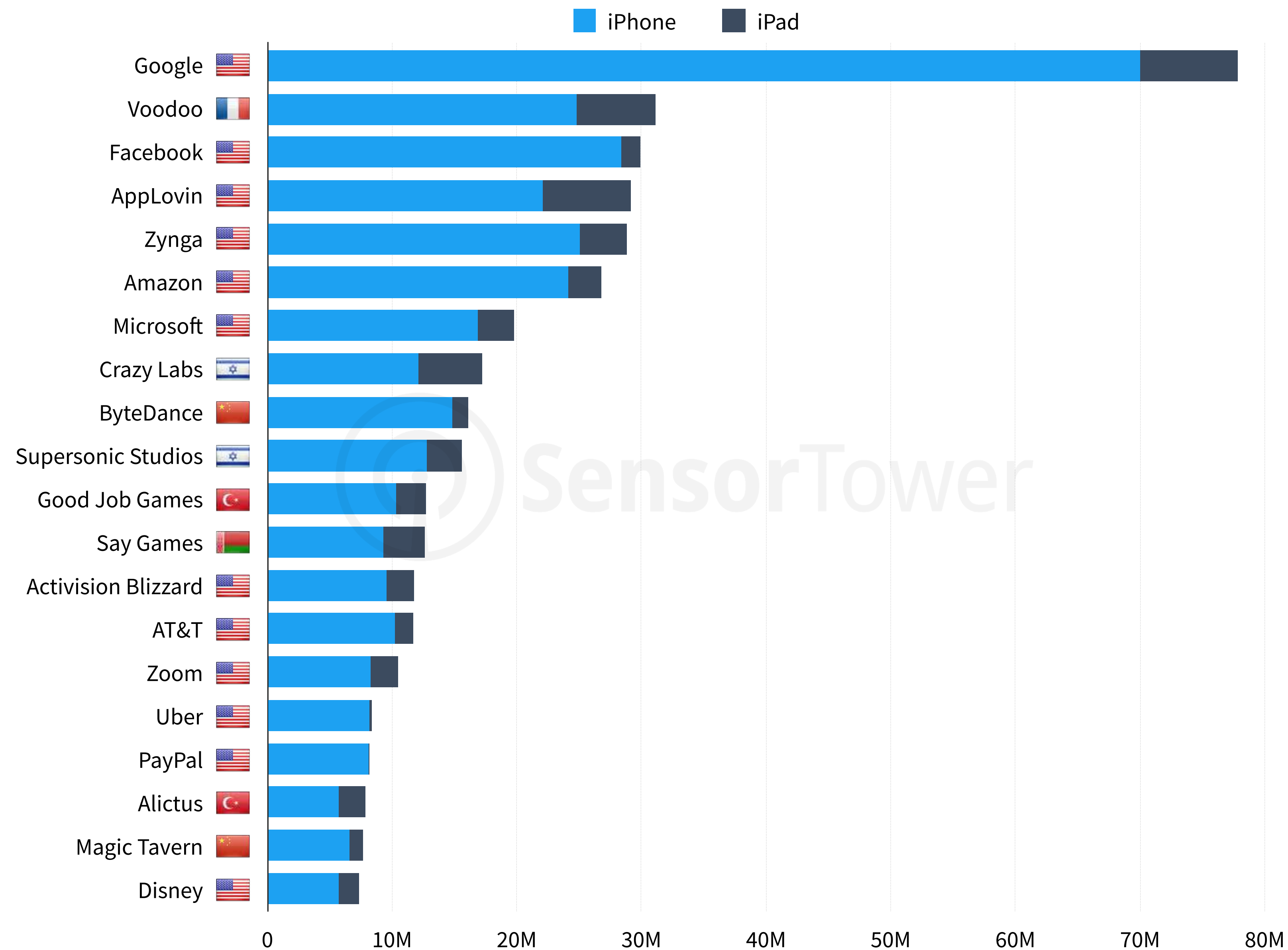
Zynga moved into the top five publishers in the U.S. with its installs up 58 percent quarter-over-quarter. Zynga saw a boost from its late 2020 acquisition of Rollic Games.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1 through Mar. 31, 2021.

Apple apps and Google pre-installed apps are excluded. We report unique installs only. Android estimates do not include third-party stores.

App Store - United States



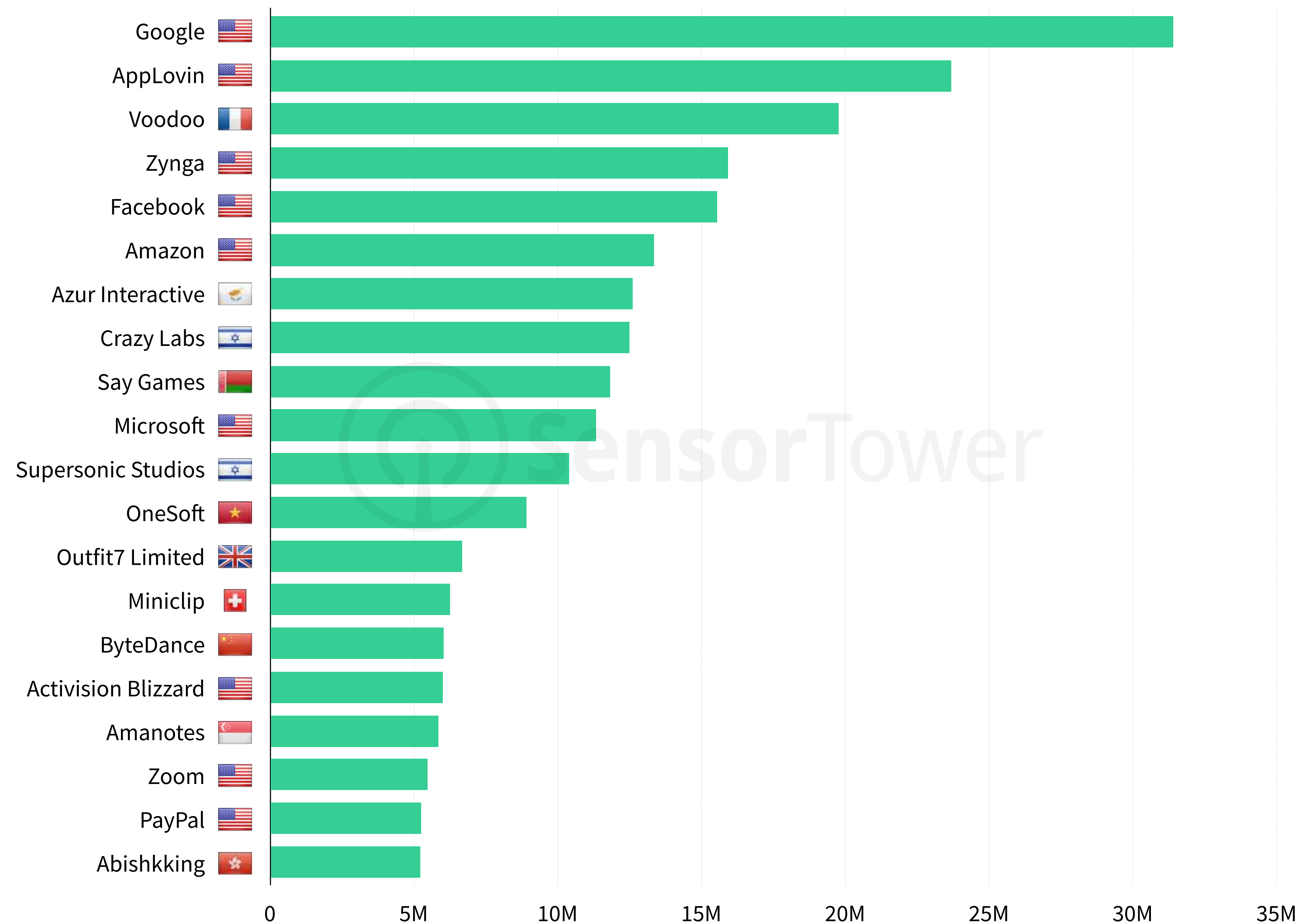
Google continued its dominance on the U.S. App Store with nearly 80 million downloads. Voodoo ranked No. 2 with 31 million installs.

Zynga and ByteDance were the only top 10 publishers in Q1 2021 that weren't among the top 10 in Q4 2020. ByteDance's downloads grew 35 percent Q/Q.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Jan. 1 through Mar. 31, 2021. Apple apps are excluded. We report unique installs only (one download per User).

Google Play - United States



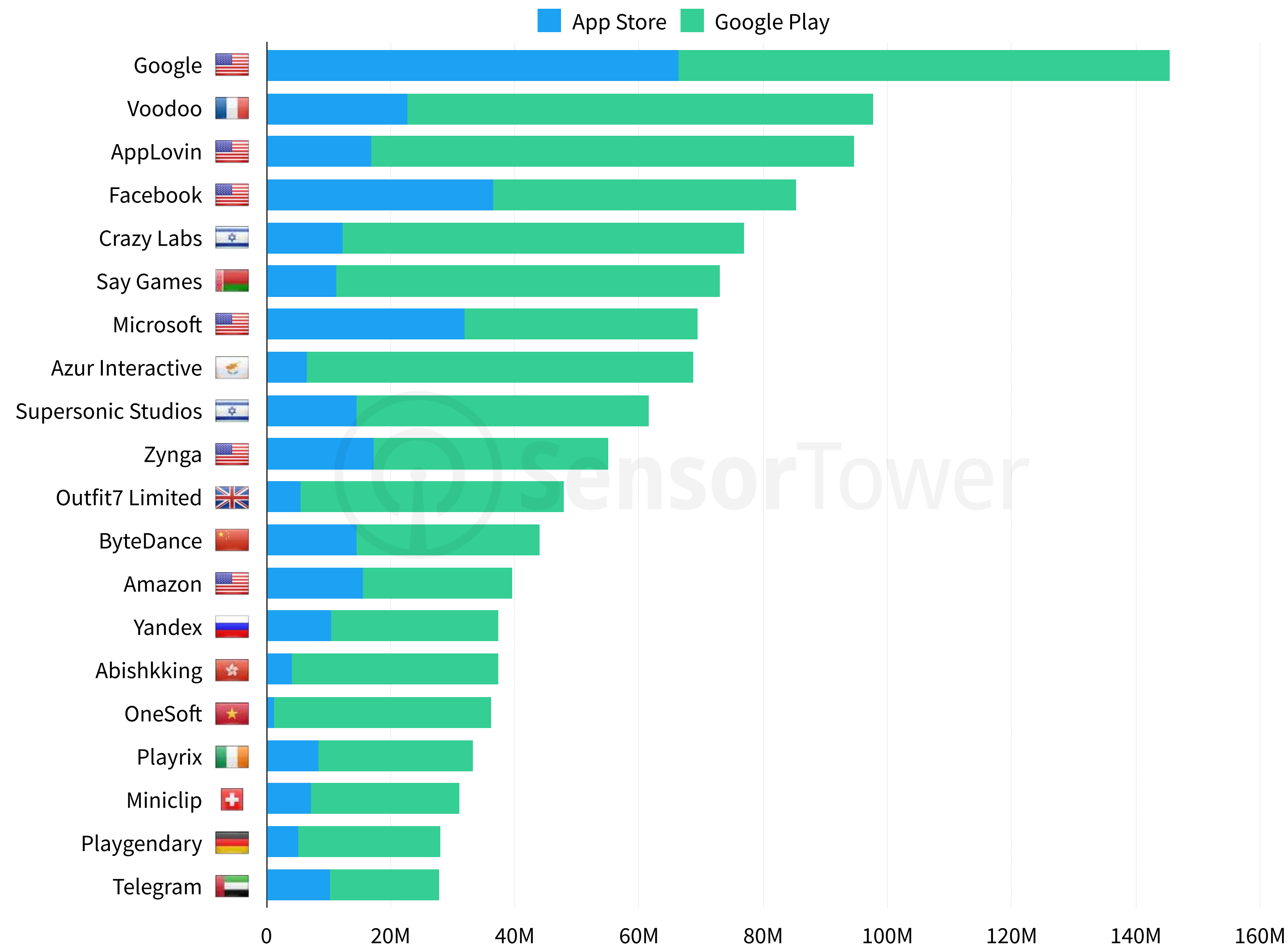
Google was also the top publisher on Google Play, though it held a much smaller lead than on the App Store. Google Play accounted for 29 percent of Google's U.S. downloads in Q1 2021, with the other 71 percent coming from the App Store.

AppLovin passed Voodoo to rank as the No. 2 publisher in Q1 2021 on Google Play. The two publishers have been neck-and-neck for the last five quarters.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for Google Play for Jan. 1 through Mar. 31, 2021. 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



The top four publishers remained the same as Q4 2020. The only change among the top five was Crazy Labs and Microsoft flipping as the No. 5 and No. 7 publishers.

Publishers from across the globe found success in Europe in Q1 2021. There were 14 different publisher countries represented among the top 20, with only the U.S. (six publishers) and Israel (two publishers) having more than one of the top 20 publishers.

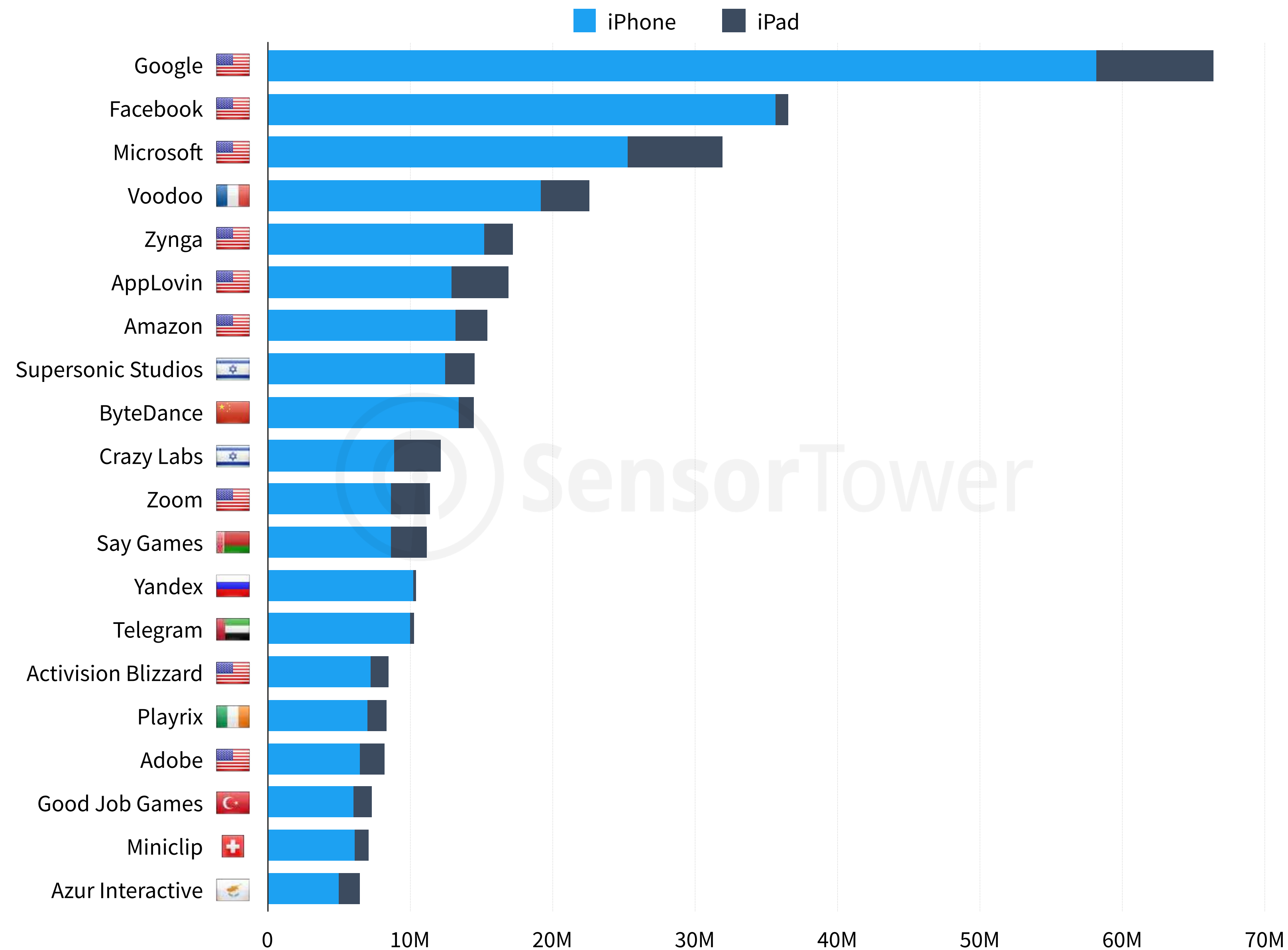
Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1 through Mar. 31, 2021.

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



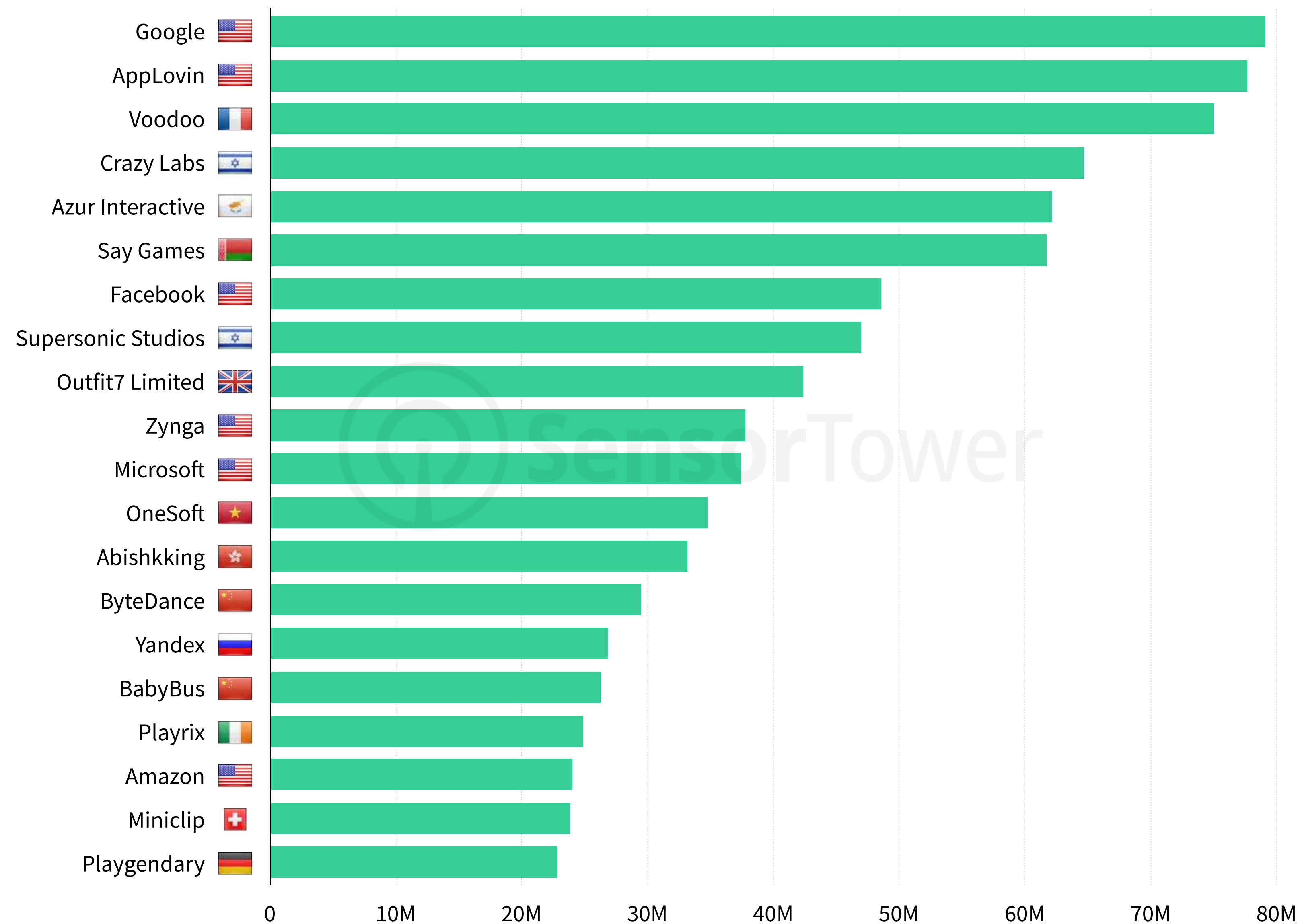
Google was the top App Store publisher in Europe as well as the United States. Its European installs came within 1 million of its previous high from Q4 2020.

Zoom has been a top 20 publisher in Europe since Q1 2020. It ranked at No. 11 last quarter.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Jan. 1 through Mar. 31, 2021. Apple apps are excluded. We report unique installs only (one download per User).

Google Play - Europe



There was competition for the top spot in Europe on Google Play, with Google, AppLovin, and Voodoo separated by less than 5 million downloads for the quarter.

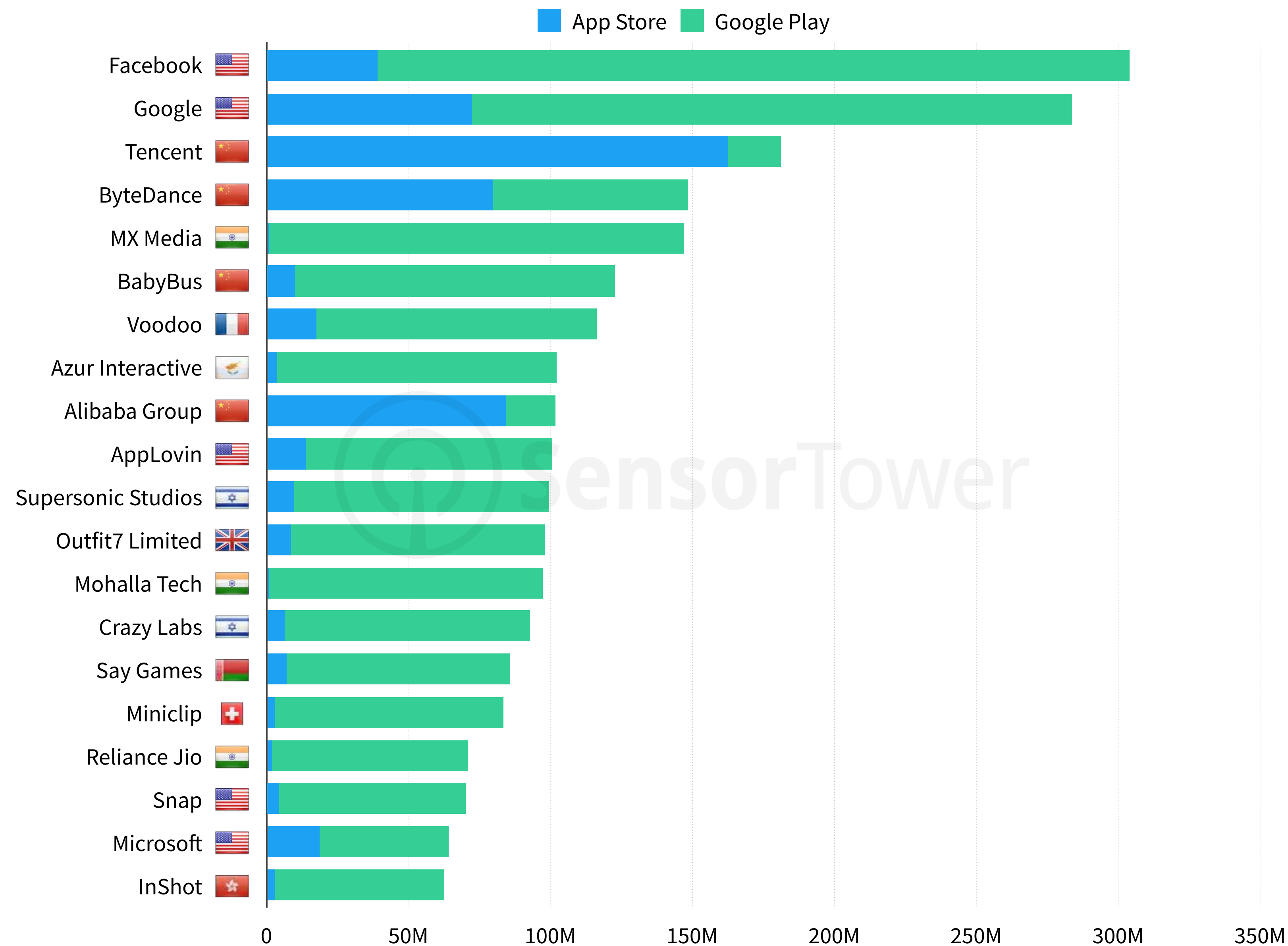
AppLovin moved up from the No. 5 spot in the previous quarter.

Crazy Labs and Azur Interactive rounded out the top five. Crazy Labs saw growth of more than 50 percent Q/Q, while Azur Interactive had more modest growth of 9 percent Q/Q.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for Google Play for Jan. 1 through Mar. 31, 2021. We report unique installs only (one download per User). Google preinstalled apps are excluded. Android download estimates do not include third-party stores.

Overall - Asia



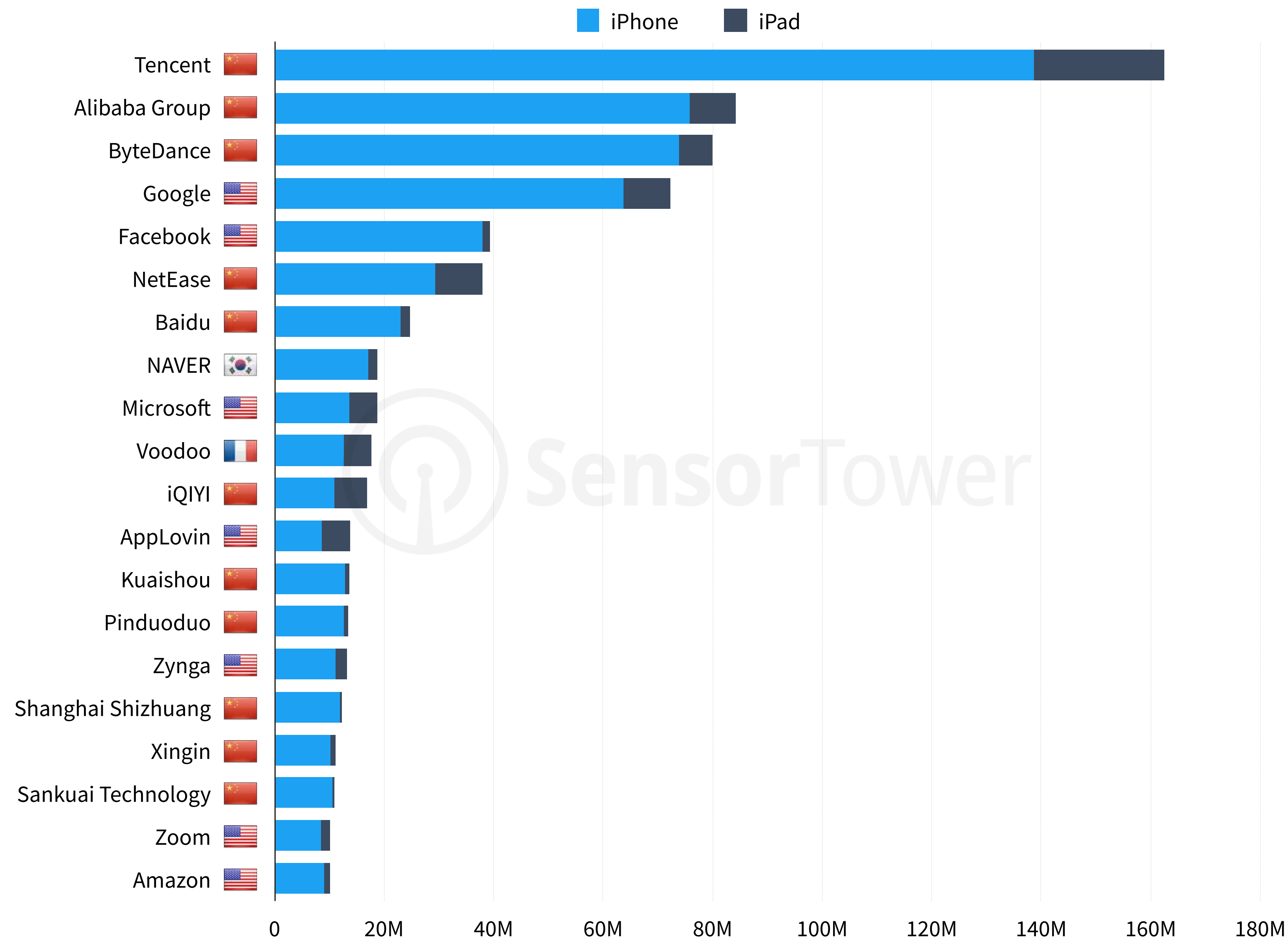
Facebook was the top publisher in Asia, regaining the top spot for the first time since a year prior. Facebook has been consistently driven more than 300 million downloads of its apps in Asia each quarter since Q4 2016.

Tencent managed to rank at No. 3 despite being outside of the top 20 on Google Play. Nearly 90 percent of its installs in Q1 2021 came from the App Store, with about 10 percent coming from Google Play.

Note Regarding Download Estimates

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

App Store - Asia



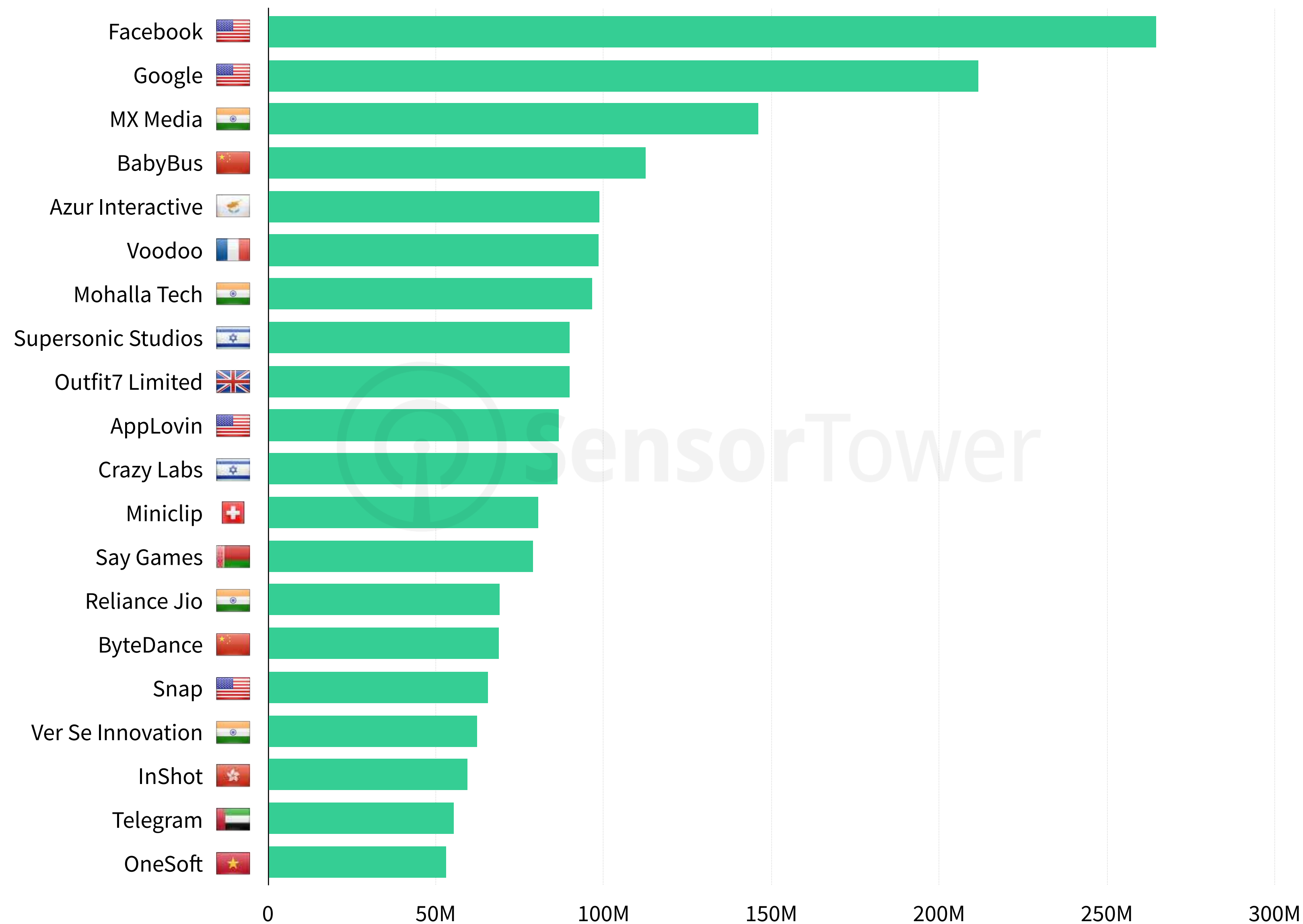
Tencent was the top publisher on the App Store in Q1 2021 with 162 million downloads. Alibaba and ByteDance ranked No. 2 and No. 3, respectively, with 80 to 90 million downloads apiece.

More than half of the top 20 iOS publishers were based in China, including all of the top three. China accounted for 56 percent of App Store downloads in Asia in Q1 2021, followed by Japan at 13.5 percent and Vietnam at 5.5 percent.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Jan. 1 through Mar. 31, 2021. Apple apps are excluded. We report unique installs only (one download per User).

Google Play - Asia



Facebook and Google were the top two publishers on Google Play in Asia. Google had passed Facebook for two quarters in 2020, but that was the only time it had more downloads than Facebook since at least Q1 2014.

Four India-based publishers were among the top 20 publishers on Google Play.

India's ban on certain apps from Chinese companies provided an opportunity for domestic publishers to gain market share.

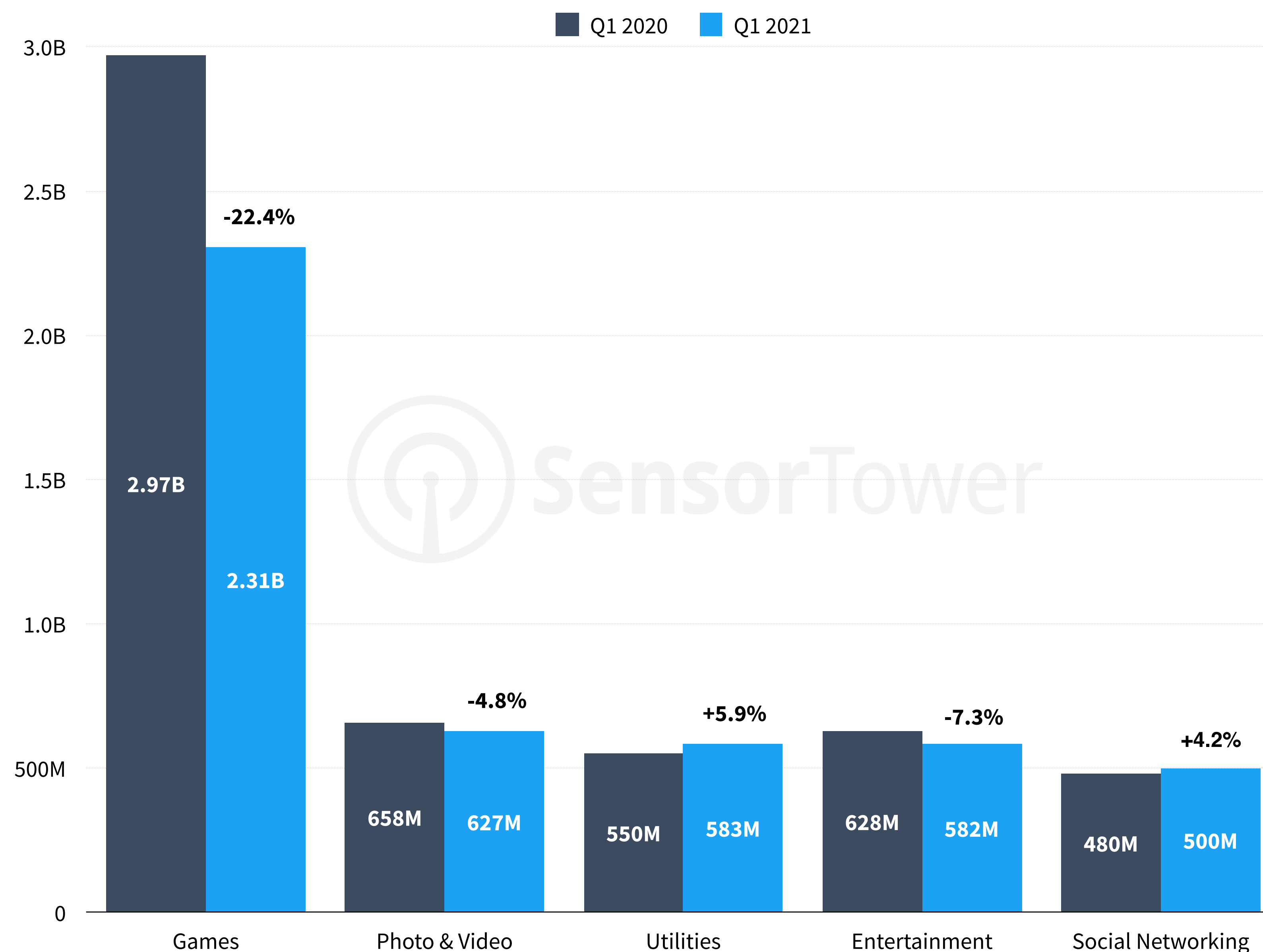
Note Regarding Download Estimates

Our estimates include worldwide daily download totals for Google Play for Jan. 1 through Mar. 31, 2021. 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

—
Top Categories by Downloads in Q1 2021

App Store



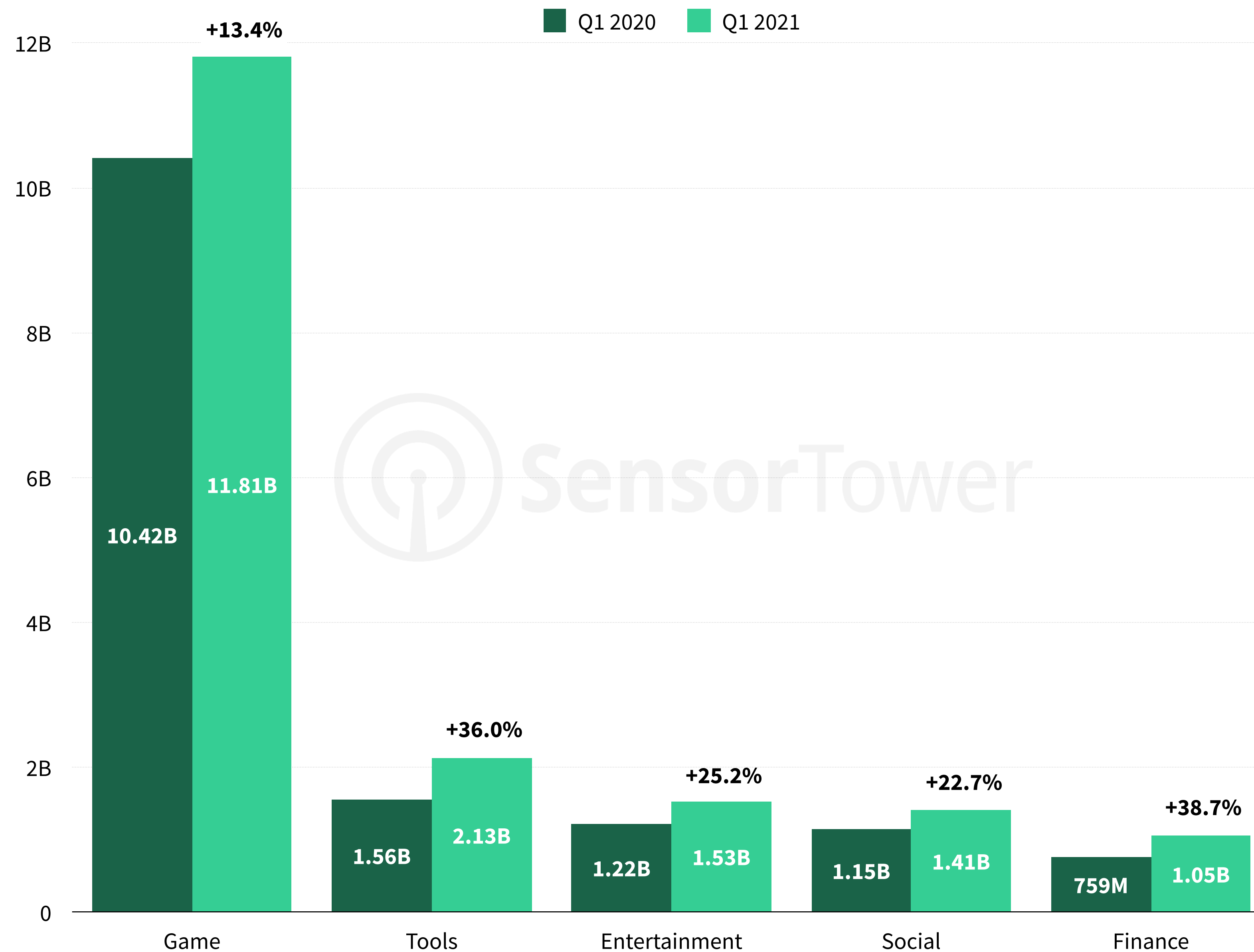
Games downloads fell 22.4 percent Y/Y, though they were still up 9 percent Q/Q. Much of the Y/Y decline can be explained by games seeing especially high download totals in China at the start of the pandemic.

Among the top five categories, only Utilities and Social Networking saw positive Y/Y growth. Finance also had 24 percent Y/Y growth to rank just outside the top five in Q1 2021 as interest in stock training and cryptocurrency surged.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Jan. 1 through Mar. 31, 2021. Apple apps are excluded. We report unique installs only (one download per User).

Google Play



Q1 Categories by Worldwide Downloads

While many top App Store categories saw downloads decline Y/Y, Google Play categories performed well in the quarter.

Some of this difference is explained by the download boost seen during COVID-19 hitting top markets at different times. Google Play did not see most of its growth until Q2 2020.

The top five categories were the same as Q4 2020 except for Finance replacing Video Players. Finance had the highest Y/Y growth among the top categories.

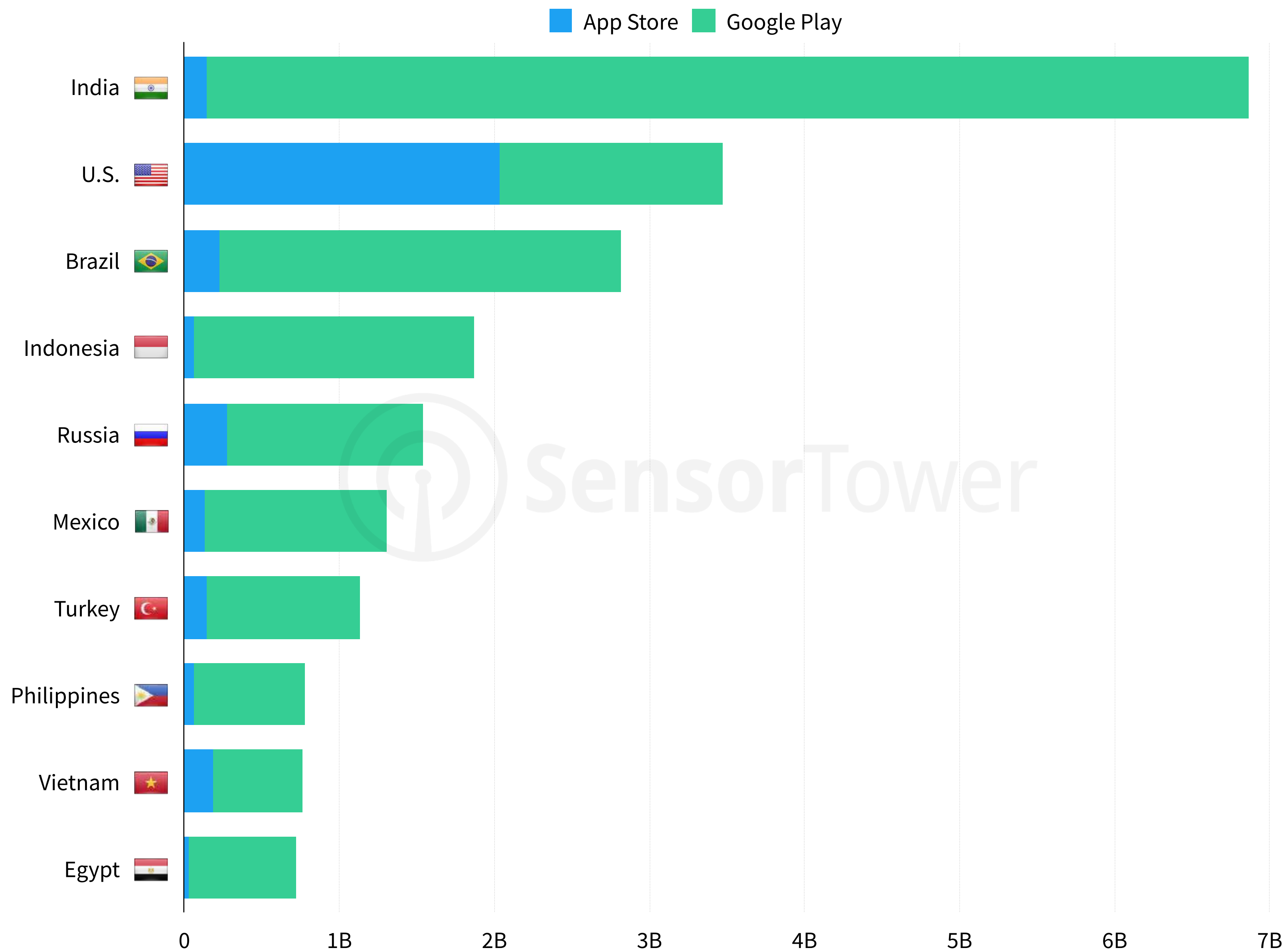
Note Regarding Download Estimates

Our estimates include worldwide daily download totals for Google Play for Jan. 1 through Mar. 31, 2021. 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 Countries

Top Countries by Downloads in Q1 2021

Overall



Egypt was the only country to enter the top 10 in Q1 2021, making the top 10 for the first time since Q2 2020. The rest of the order among the top countries was unchanged from Q4 2020.

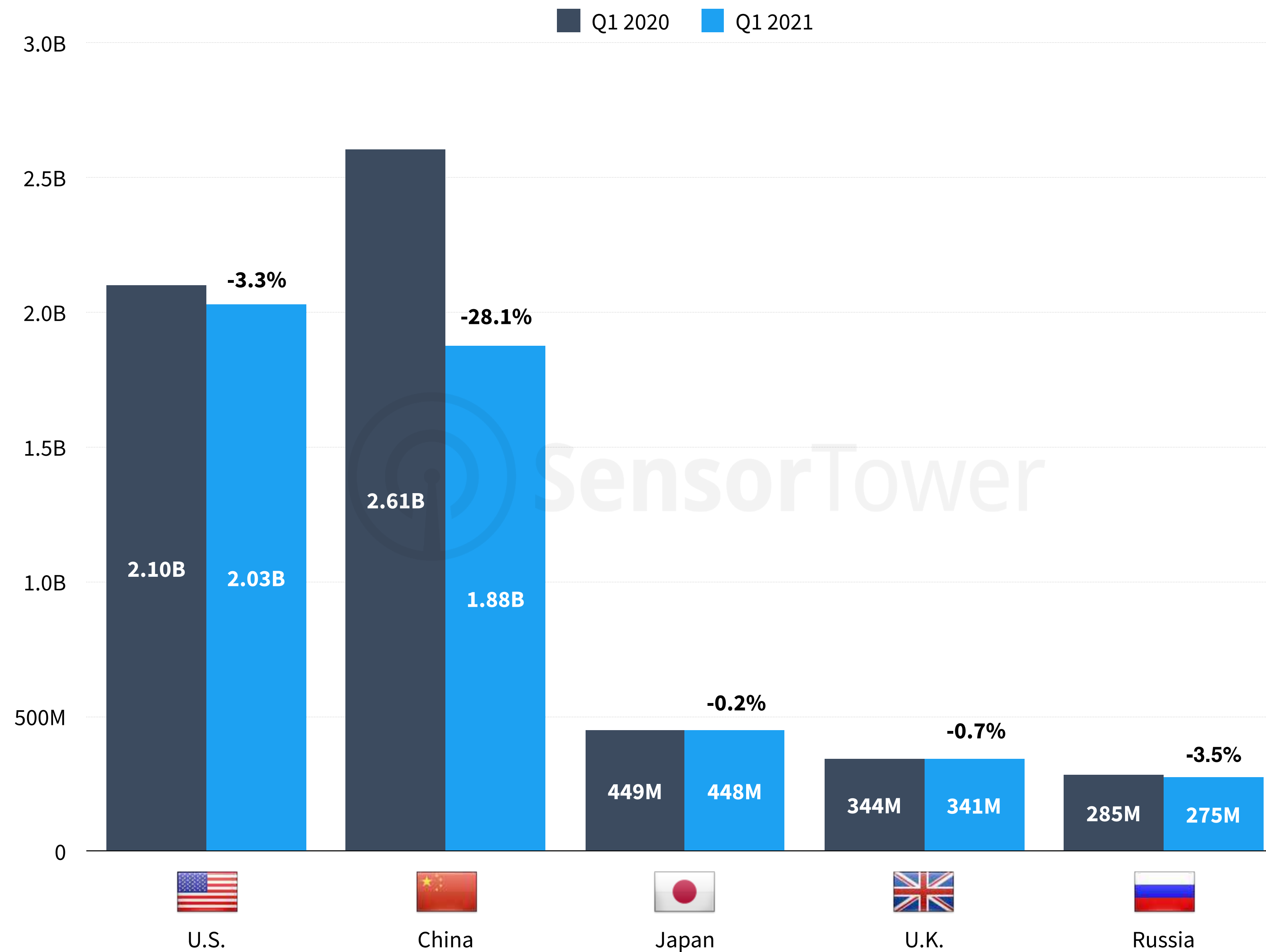
The Philippines had the highest Y/Y growth in Q1 2020 at 32 percent, followed by India at 31 percent and Indonesia at 24 percent. The U.S., Russia, and Vietnam were the only markets that saw downloads fall Y/Y.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Jan. 1 through Mar. 31, 2021. 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



Q1 Countries by Downloads

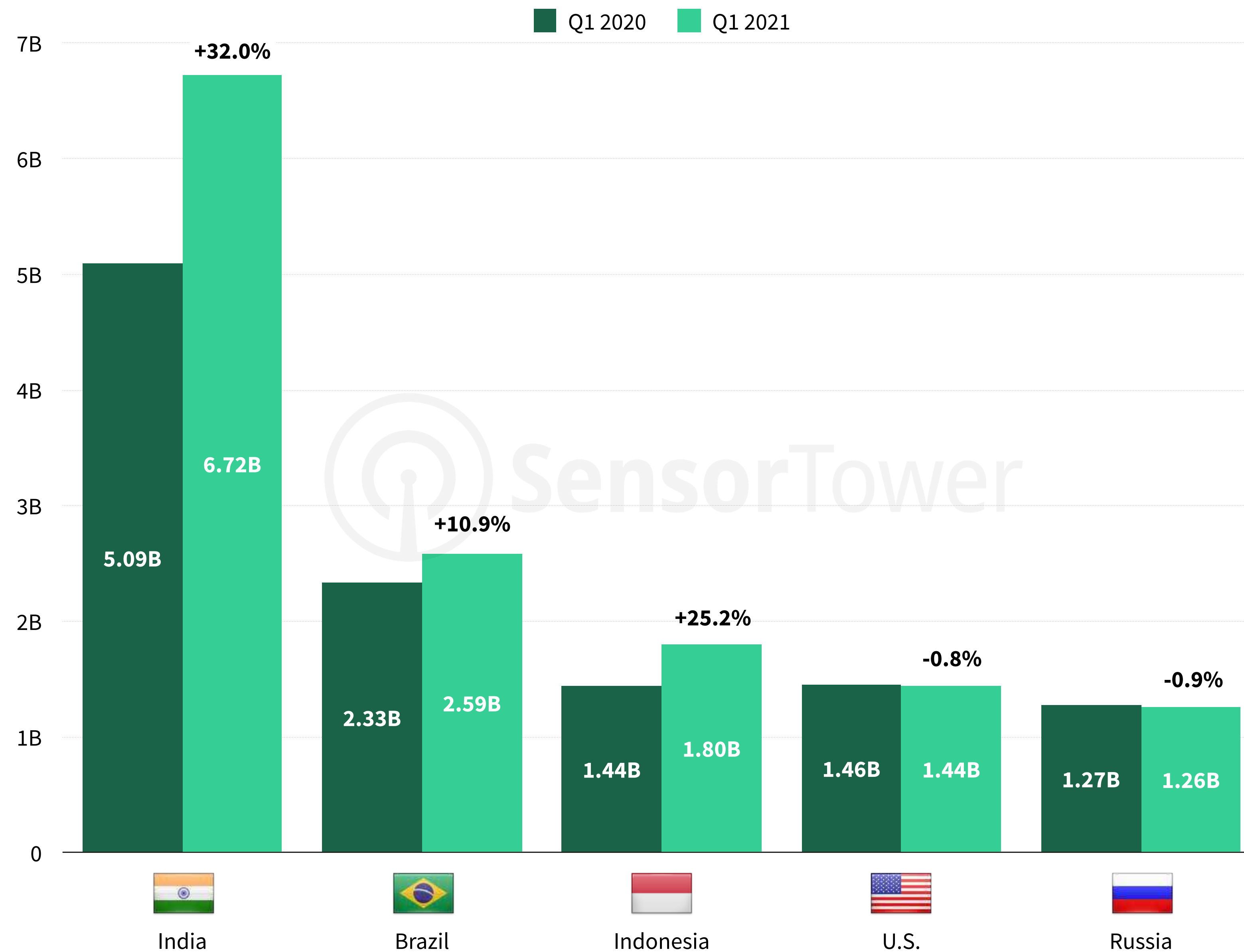
Downloads surged at the start of the pandemic in 2020 as consumers turned to mobile devices to adapt to their changing lifestyles. Installs fell year-over-year as a result across top markets.

China experienced the biggest boost in Q1 2020 due to COVID-19 affecting the country earlier on in the year, and it saw the largest Y/Y drop as a result. The U.S. also saw downloads decline Y/Y, though they were still up 17 percent compared to Q1 2019.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Jan. 1 through Mar. 31, 2021. Apple apps are excluded. We report unique installs only (one download per User).

Google Play



The download spike from COVID-19 started on Google Play in Q1 2020 before accelerating Q2. Downloads have remained high since, and the three largest markets saw double-digit growth Y/Y in Q1 2021.

The U.S. and Russia both saw downloads fall slightly Y/Y. Growth in each market has stalled in recent quarters, though both managed to have positive growth compared to 2019.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for Google Play for Jan. 1 through Mar. 31, 2021. 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.



Stories of the Quarter

—
Key Trends in Mobile

Stories of the Quarter:

Introduction



1. Investing and Crypto Apps Take Off

Increased attention for stock trading apps plus skyrocketing cryptocurrency prices created record demand for finance apps.



2. Launch of *Crash Bandicoot: On the Run*

King's latest game launch saw huge success in its first few weeks and compared favorably to other King releases.



3. Consumers Turn to Secure Messaging Apps

Demand for secure messaging apps spiked in Q1 2021 and apps like Telegram and Signal saw rapid growth as a result.

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

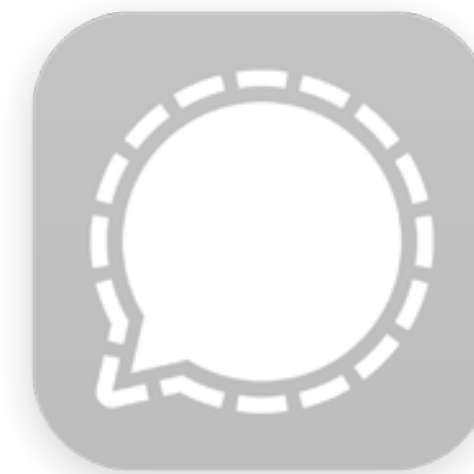
[REQUEST DEMO](#)

Stories of the Quarter:

1. Investing and Crypto Apps Take Off

Finance app downloads across North America and Europe soared to record highs in Q1 2020. Apps offering commission-free stock trading drew attention after trading activity caused by the WallStreetBets subreddit. Meanwhile, cryptocurrency prices skyrocketed during the quarter, increasing demand for apps with Bitcoin and other cryptocurrencies.

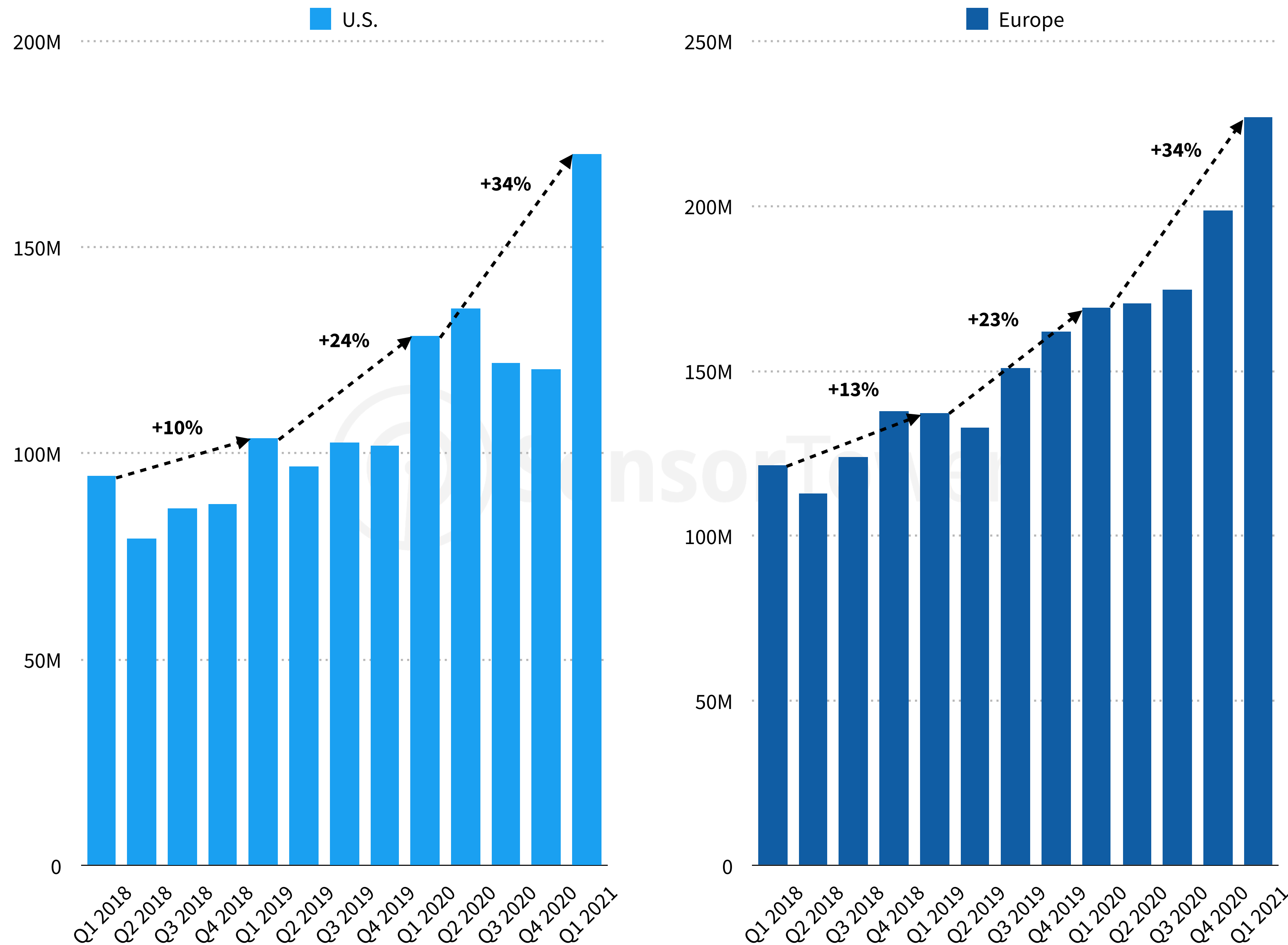
- **Finance app installs grew 34 percent Y/Y in the U.S. and Europe in Q1 2021, about 10 percentage points higher than the growth a year prior.** U.S. installs surpassed 172 million in the quarter, up from a previous high of 135 million.
- **Seven of the top 10 U.S. Finance apps by Q/Q download growth were stock trading or cryptocurrency apps.** Eight of the top 10 in Europe were stock trading or crypto apps.
- **Downloads for the top five stock trading / crypto apps in Europe surpassed those from mobile banking and payment apps each month in Q1 2021.**



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

Finance Download Growth



With substantial interest in stock trading and the rising prices of Bitcoin in Q1, Finance category apps built on a pandemic-driven download boost.

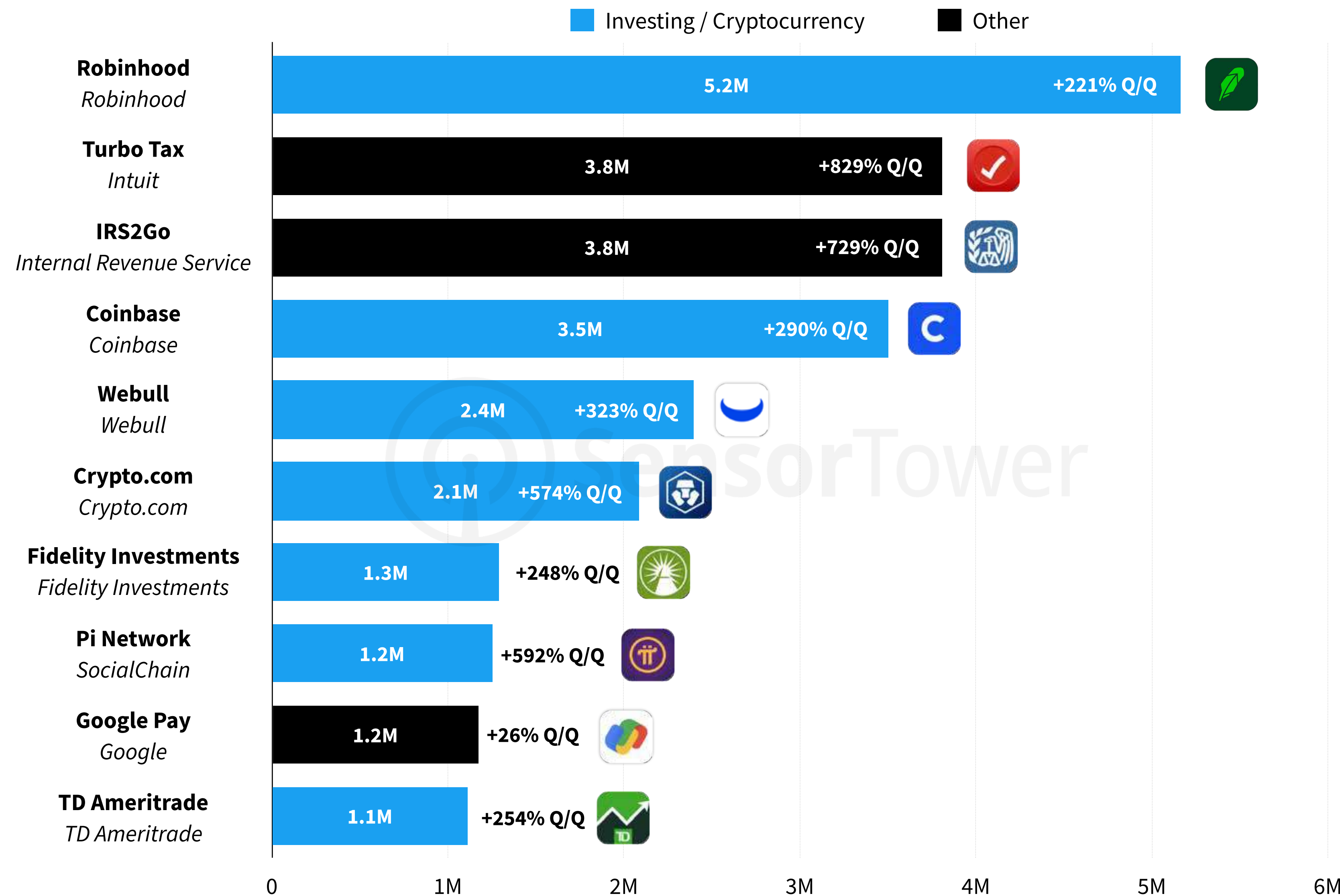
U.S. and European Finance category installs grew 34 percent Y/Y to reach new highs.

U.S. finance app installs usually peak in the first quarter with the influx of demand for tax apps. Installs were boosted further this year by demand for apps such as Robinhood and Coinbase.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1, 2018 through Mar. 31, 2021. Apple apps and Google pre-installed apps are excluded. We report unique installs only. Android estimates do not include third-party stores.

U.S. Finance Apps by Growth



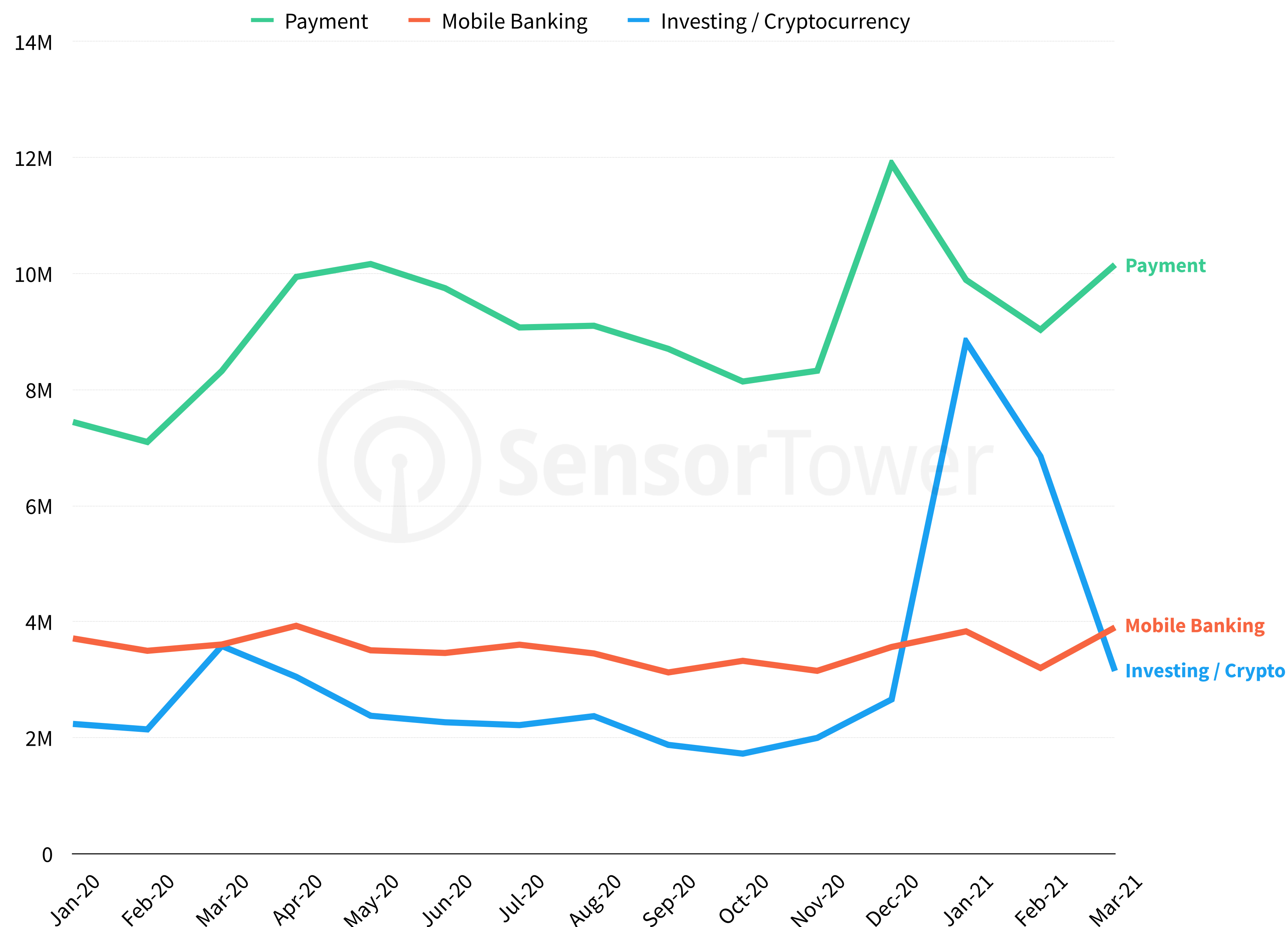
Seven of the top 10 U.S. finance apps by Q/Q download growth were investing or cryptocurrency apps. The only other apps among the top five were tax related apps, which see installs surge in the first quarter each year with the coming tax season.

Cryptocurrency apps performed particularly well, with Crypto.com and Pi Network seeing Q/Q growth of more than 500 percent. Other investing / crypto apps saw at least 200 percent Q/Q growth.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Oct. 1, 2020 through Mar. 31, 2021. Apple apps and Google pre-installed apps are excluded. We report unique installs only. Android estimates do not include third-party stores.

U.S. Finance Subcategories



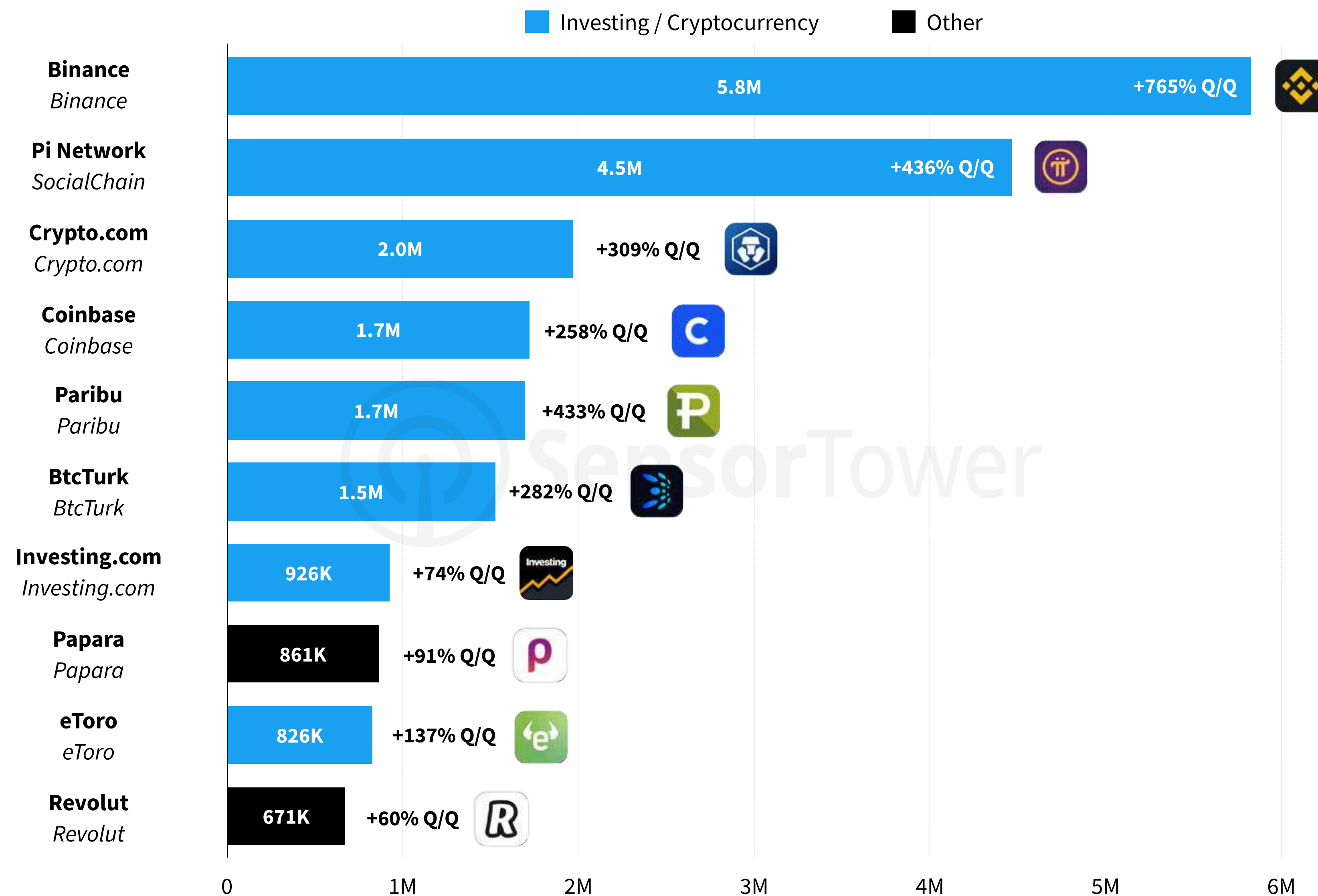
Downloads for the top investing / crypto apps surged 3.3x in January 2021 versus December 2020 to nearly reach the level of payment apps. Installs decreased in February and March but were still well above the late-2020 totals.

It's also worth noting that the investment and cryptocurrency market on mobile remains competitive. Many apps outside of the top five included here saw significant growth in Q1 2021.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1, 2020 through Mar. 31, 2021. Cohort includes the top five apps in each subcategory by U.S. downloads in the study period.

Europe Finance Apps by Growth



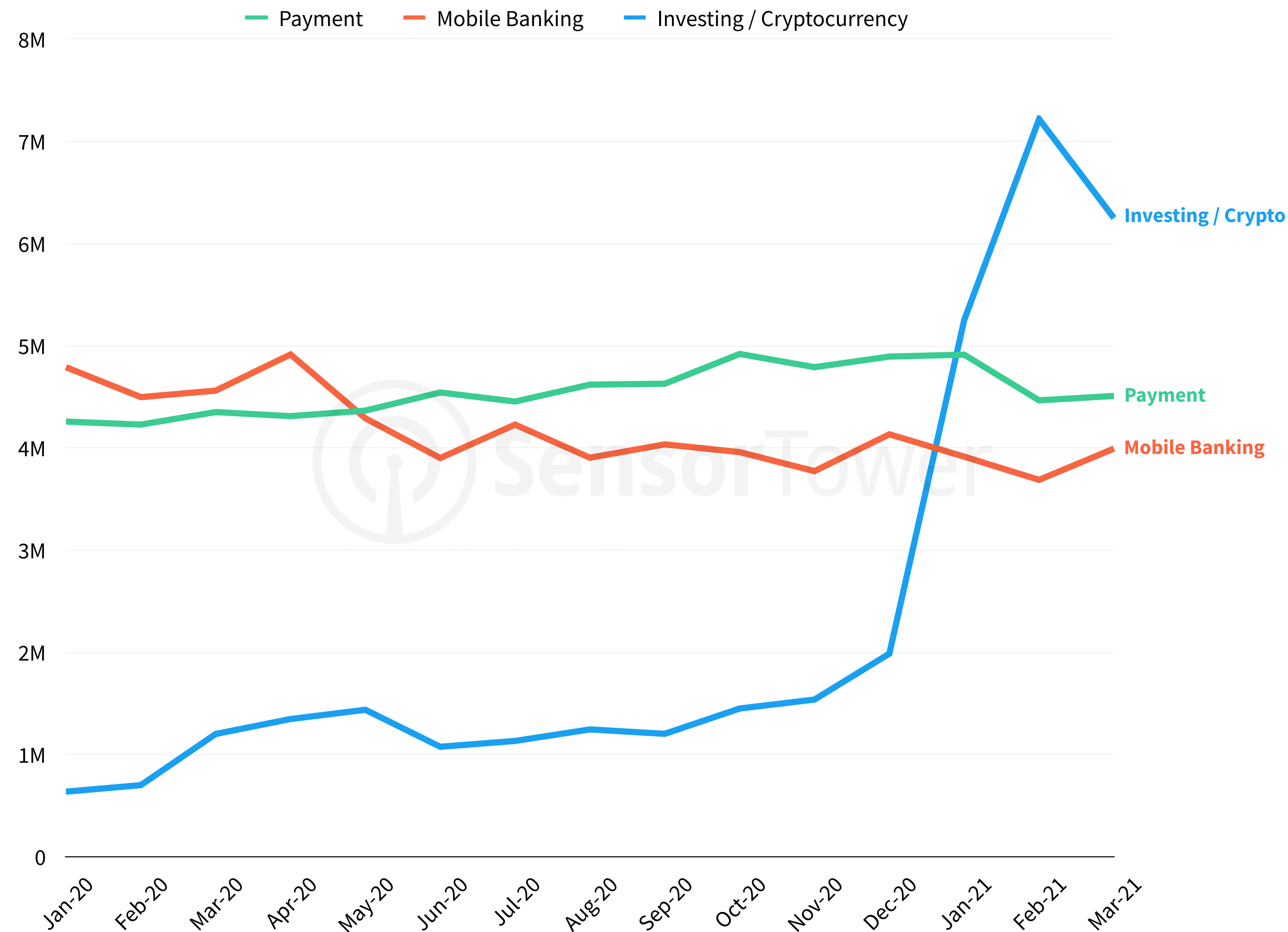
In Europe, eight of the top 10 finance apps by Q/Q growth were investment and cryptocurrency apps. The top five apps all focused on cryptocurrency and had at least 250 percent Q/Q growth in Q1 2021.

Revolut, a popular neobank in Europe, was one of the two non-asset management apps among the top 10. However, Revolut does have crypto and stock trading, perhaps explaining the boost it saw this quarter.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Oct. 1, 2020 through Mar. 31, 2021. Apple apps and Google pre-installed apps are excluded. We report unique installs only. Android estimates do not include third-party stores.

Europe Finance Subcategories



Investing and cryptocurrency app installs surged past those from top payment and mobile banking apps in Europe. Unlike the U.S., downloads for investing and crypto apps grew even higher in February.

Demand remained high through the end of the quarter. The top five apps combined for more than 6.2 million downloads in Europe in March 2021, up from around 2 million downloads in December 2020.

Note Regarding Download Estimates

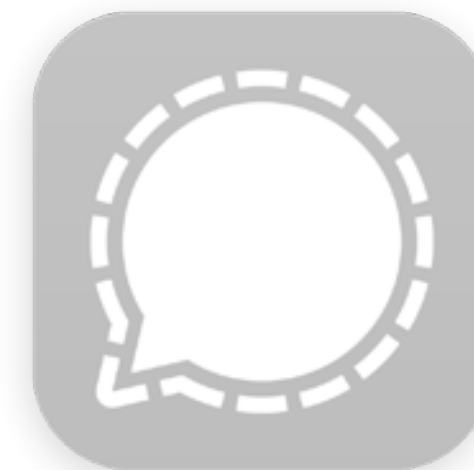
Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1, 2020 through Mar. 31, 2021. Cohort includes the top five apps in each subcategory by Europe downloads in the study period.

Stories of the Quarter:

2. Launch of *Crash Bandicoot: On the Run*

Activision Blizzard-owned mobile games company King made a rare move away from the Puzzle genre when it launched Arcade genre game **Crash Bandicoot: On the Run** in late March 2021—and it was an immediate success. It's off to one of the best starts for any King game launched in the past five years and will be a key title to watch in Q2 2021 and beyond.

- **Crash Bandicoot: On the Run was the top new game by U.S. downloads in Q1 2021.** It managed this despite not being launched until March 25.
- **The new hit game from King propelled Activision Blizzard to its second highest download total in a quarter since 2017, and its best quarter since it launched Call of Duty: Mobile in Q4 2019.**
- **Crash Bandicoot: On the Run had more than 23 million installs in its first week, making it King's most successful launch by downloads since 2016.**

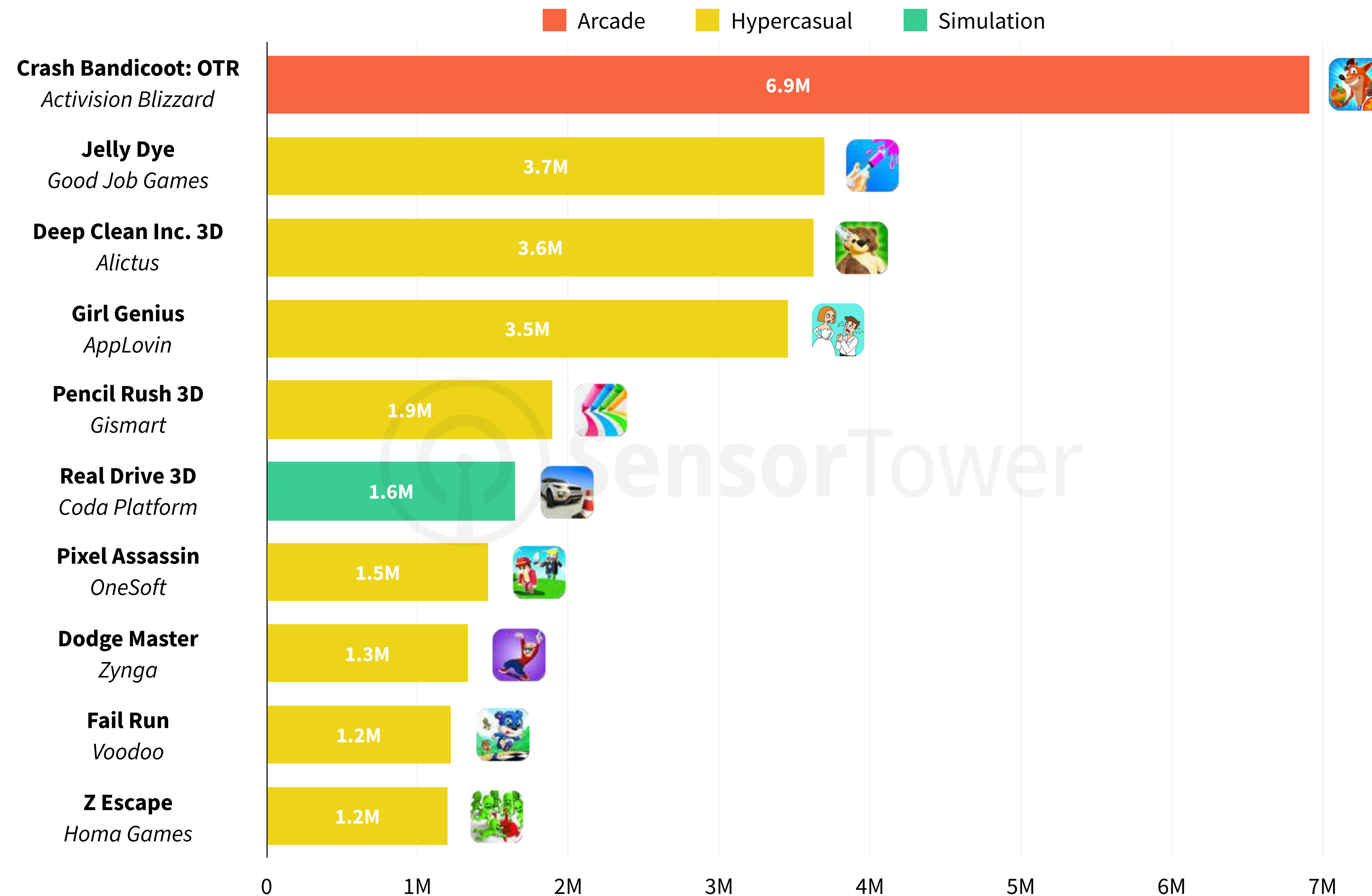


Crash Bandicoot: On the Run

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 New Games in the U.S. for Q1



Crash Bandicoot: On the Run was the top new game launched in Q1 2021 in the U.S. with nearly seven million installs. It is all the more impressive considering that it launched in late March, while most of the other top games launched early in Q1.

Crash Bandicoot: On the Run was also one of the rare non-hypercasual games to achieve such a high install total. Out of the top 10 new games in Q1 2021, eight were hypercasual games.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1, 2021 through Mar. 31, 2021. New games are defined as games that did not have any U.S. installs prior to 2021.

U.S. Platformer/Runner Games



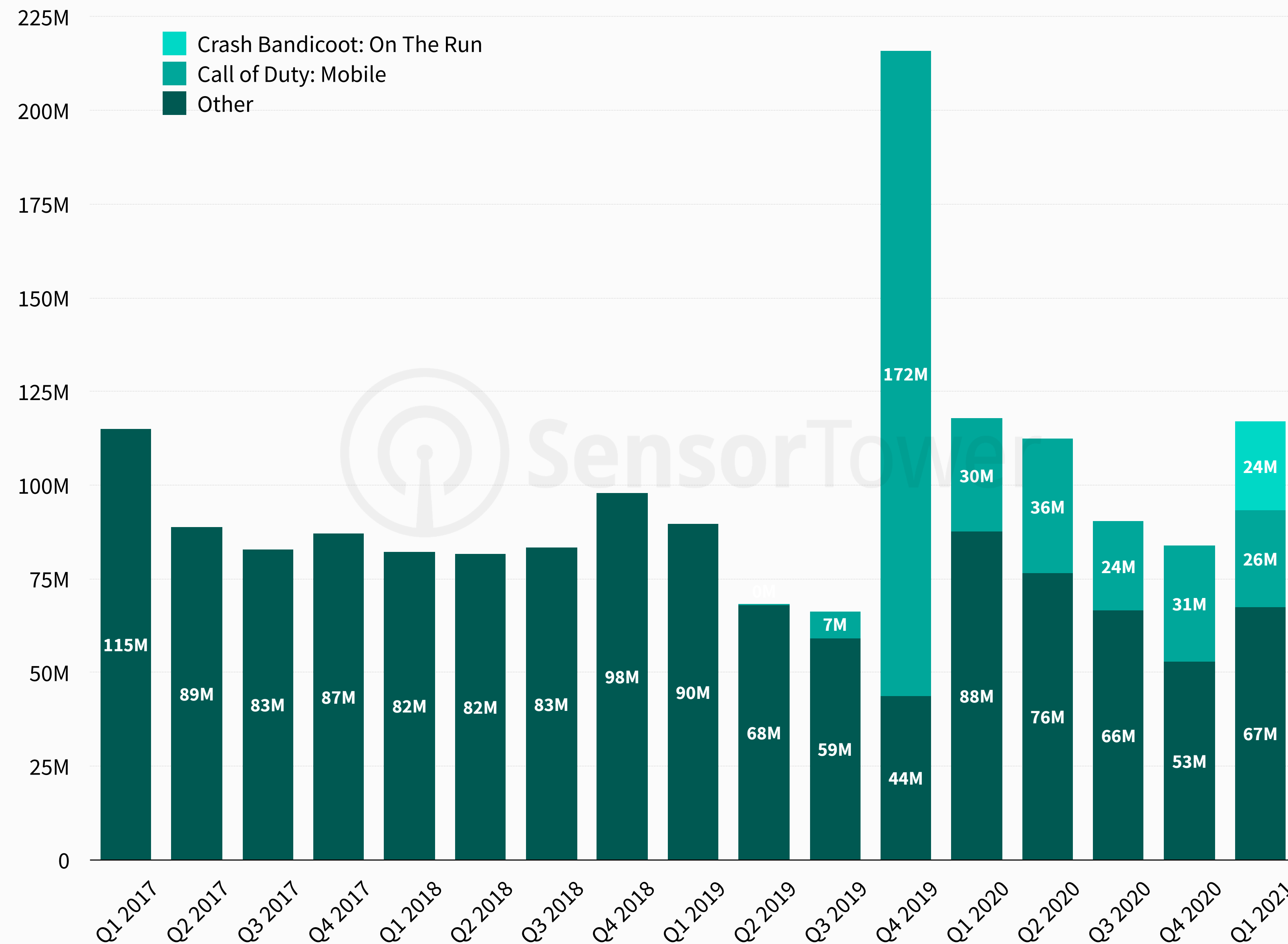
Even with its launch late in the quarter, **Crash Bandicoot: On the Run** was among the top 10 Platformer/Runner games in the U.S. in Q1 2021 by both revenue and downloads. It was the top game by U.S. downloads and ranked No. 9 by revenue.

Subway Surfers has been the consistent leader of the Platformer/Runner game genre and represents how high the ceiling is for these games, with at least 3.6 million U.S. installs each quarter since at least 2014.

Note Regarding Download and Revenue Estimates

Our estimates include worldwide downloads and revenue for iPhone, iPad, and Google Play for Jan. 1, 2021 through Mar. 31, 2021. Revenue figures are gross revenue (including the cut taken by Apple or Google).

Activision Blizzard Downloads



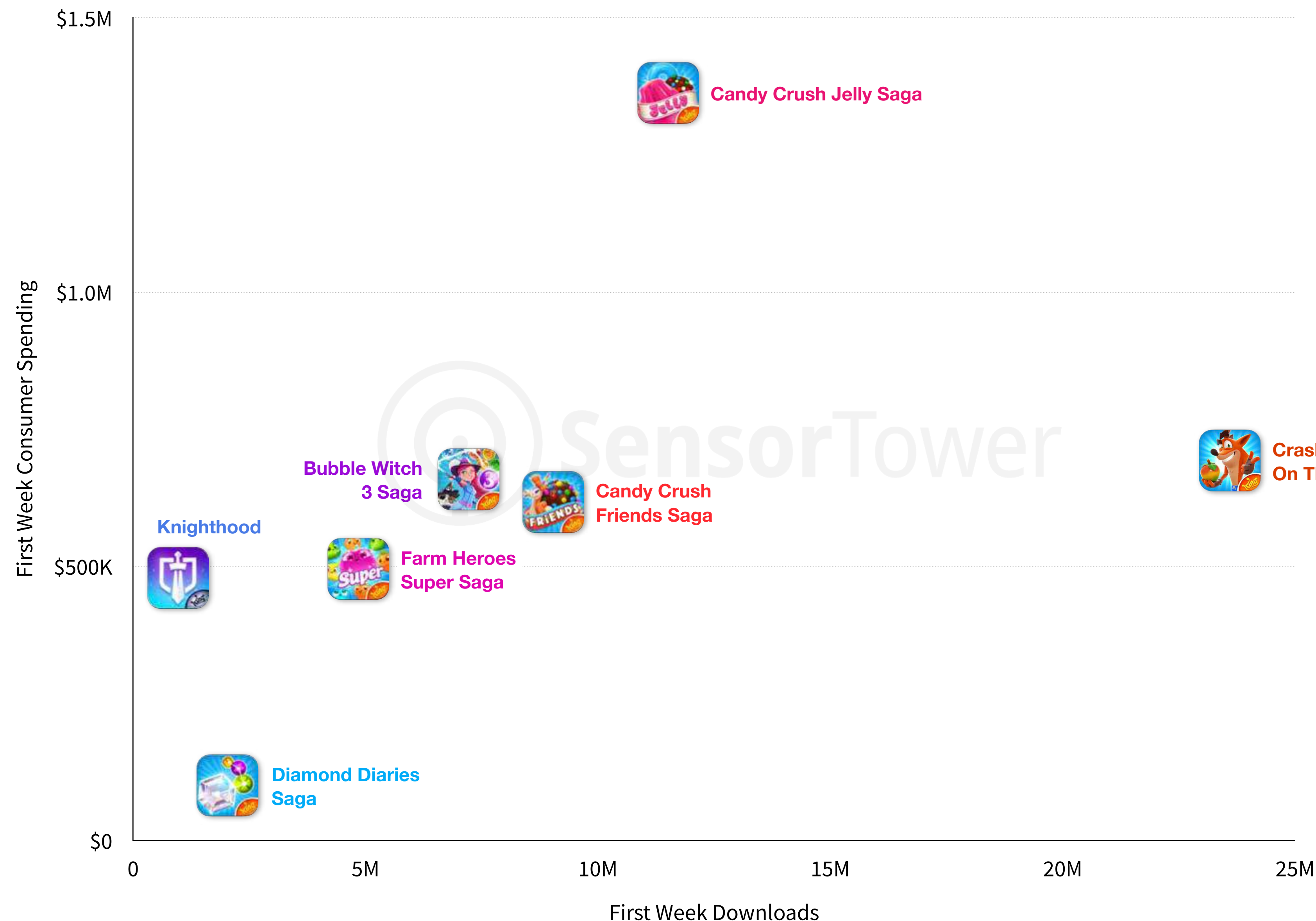
With the help of Crash Bandicoot: On the Run, Activision Blizzard's downloads surpassed 115 million for just the third time since 2017. It was the publisher's best quarter by downloads since it launched Call of Duty: Mobile in late 2019.

Activision Blizzard's installs had fallen each quarter since the launch of Call of Duty: Mobile. However, Crash Bandicoot: On the Run helped propel downloads back above the Q1 2020 total in Q1 2021.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1, 2017 through Mar. 31, 2021. Apple apps and Google pre-installed apps are excluded. We report unique installs only. Android estimates do not include third-party stores.

King's Recent Launches Compared



Crash Bandicoot: On the Run's first week compares favorably to many of King's best launches since 2016. Its 23.6 million downloads was more than double the total of Candy Crush Jelly Saga, which was No. 2 with 11.5 million first week downloads.

Crash Bandicoot: On the Run was also No. 2 by first week consumer spend at nearly \$700K. This compares well to the first week revenue for many of King's top Puzzle genre games.

Note Regarding Download and Revenue Estimates

Our estimates include worldwide downloads and revenue for iPhone, iPad, and Google Play for Jan. 1, 2016 through Mar. 31, 2021. Revenue figures are gross revenue (including the cut taken by Apple or Google).

Stories of the Quarter:

3. Consumers Turn to Secure Messaging

Demand for secure and private messaging apps surged in Q1 2021 and shook up the mobile messaging space. Telegram was the top messaging app by worldwide downloads for the first time, and Signal had a huge quarter with more than 60 million installs.

- **Telegram passed long-standing top messaging apps like WhatsApp, Messenger, and Snapchat in by worldwide downloads in Q1 2021.** Signal ranked No. 5 in the quarter.
- **Secure messaging apps performed particularly well in Europe.** Telegram was the top No. 2 app overall in Europe behind only TikTok, while Signal was the No. 2 app in Germany and No. 3 in France.
- **Entering Q2 2021, the messaging app space has become very competitive.** Among the top five apps, none has gained more than 30 percent of the market share in the U.S., Europe, or Asia.



Secure Messaging Apps

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 Messenger Apps



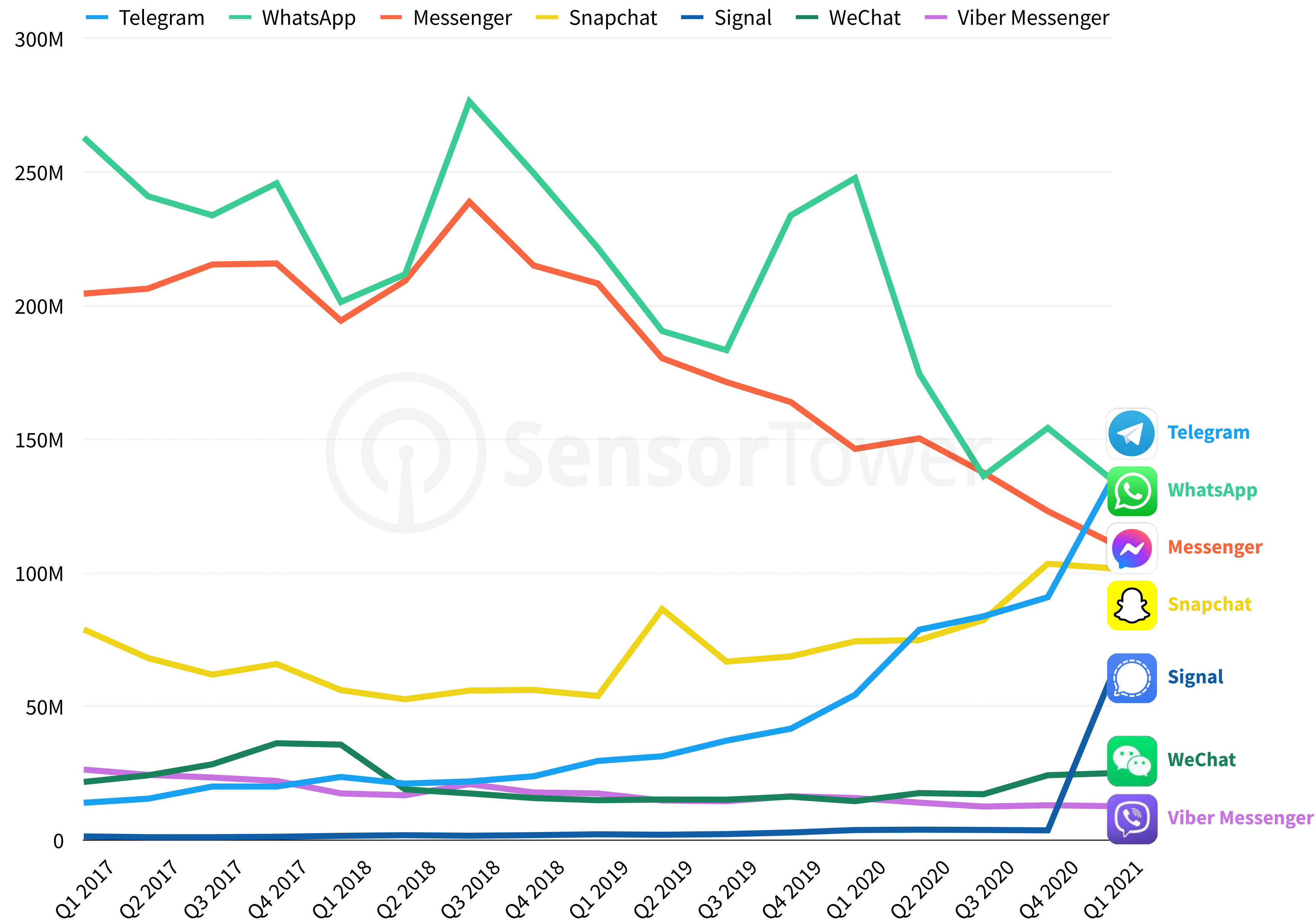
Telegram passed WhatsApp, Messenger, and Snapchat to take the top spot in Q1 2021. Its downloads grew 48 percent quarter-over-quarter to nearly 135 million.

Signal surged to take the No. 5 spot with more than 60 million downloads in the quarter. That was more than double WeChat's total.

Note Regarding Download Estimates

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

Messenger App Downloads



Prior to 2020, WhatsApp and Messenger had dominated the messaging app market, with Snapchat as the clear No. 3. That had changed by 2021, with the top four hovering between 100 and 135 million installs.

While Telegram downloads spiked in Q1 2021, it had seen steady strong growth even in earlier quarters. Signal emerged after having never reached 4 million downloads in a previous quarter.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1, 2017 through Mar. 31, 2021. Apple apps and Google pre-installed apps are excluded. We report unique installs only. Android estimates do not include third-party stores.

Messenger App Market Share



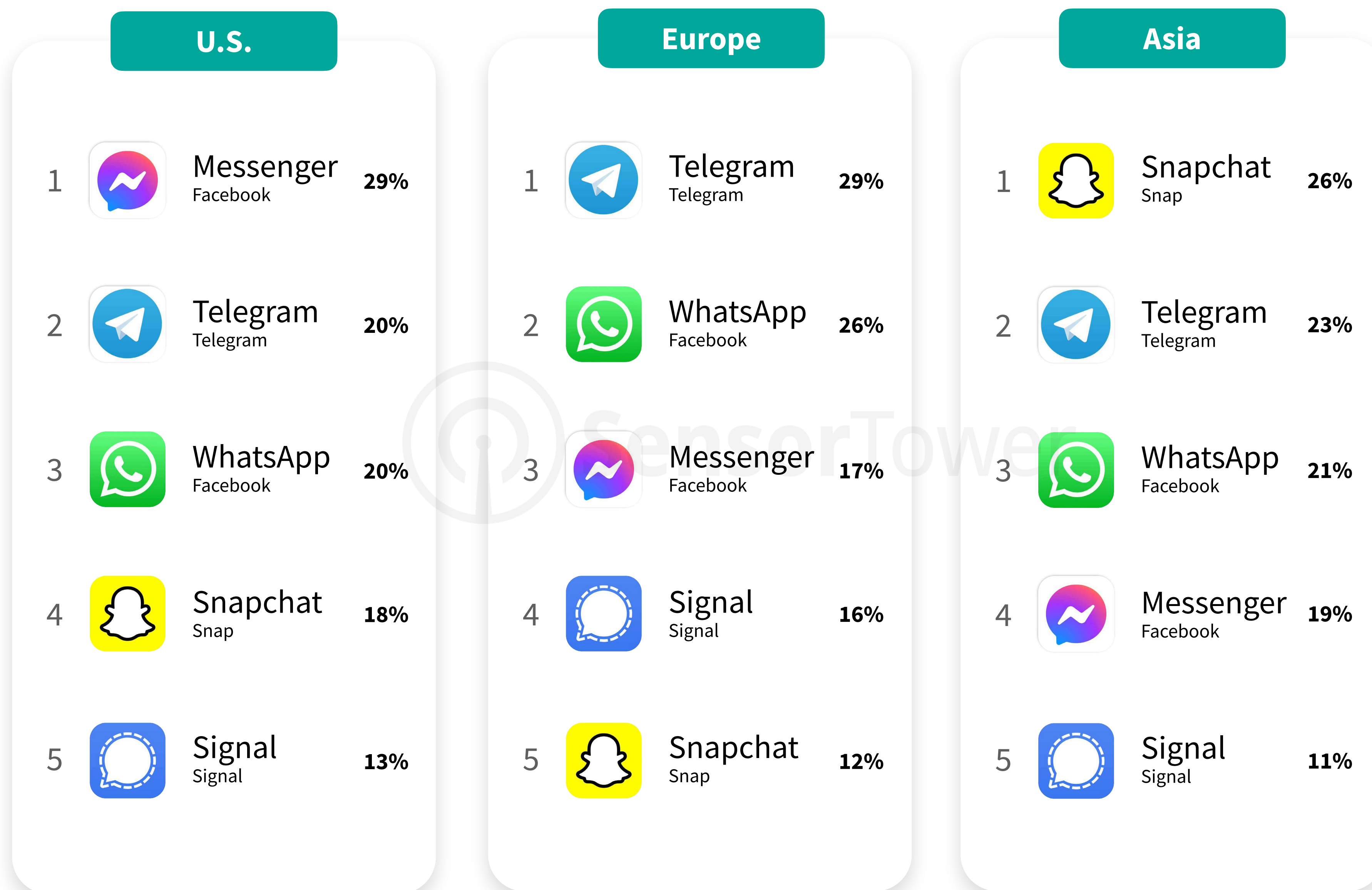
While India was the top market for each messaging app, the apps' popularity varied substantially by market. Snapchat saw more than 50 percent of its installs come from India, while Messenger's top five markets combined for only 42 percent of its total downloads.

Some European countries ranked among the top five for Telegram or Signal. Russia was the No. 5 market for Telegram in Q1, while Germany and France ranked for Signal.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1, 2017 through Mar. 31, 2021. Apple apps and Google pre-installed apps are excluded. We report unique installs only. Android estimates do not include third-party stores.

Market Share by Region



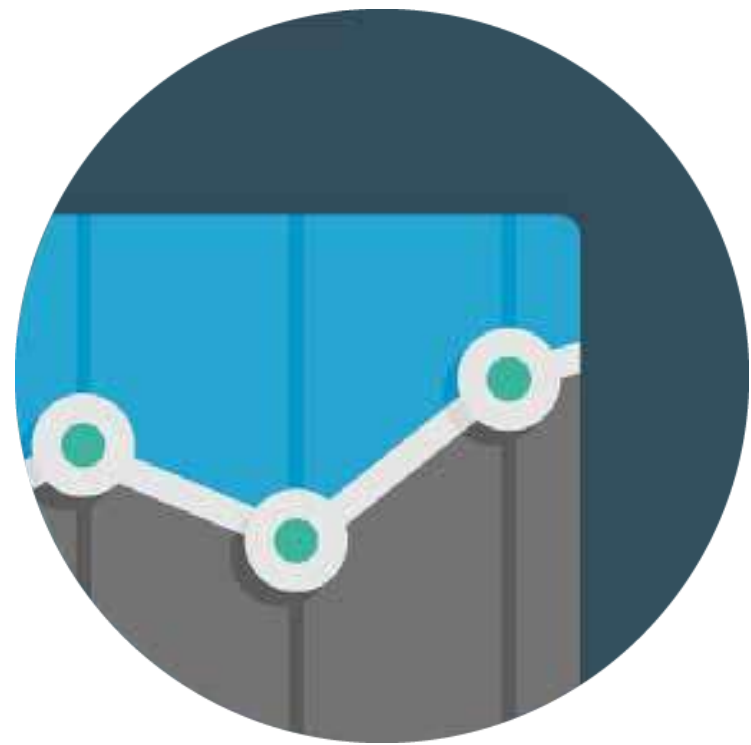
Among the top five apps worldwide, no messaging app was able to surpass 30 percent market share in any region. This indicates how competitive the space is even within regions.

A different app held the No. 1 spot in the U.S., Europe, and Asia. Telegram and WhatsApp had at least 20 percent of the market in all three regions, while Snapchat was especially popular in Asia (largely driven by India).

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1, 2017 through Mar. 31, 2021. Apple apps and Google pre-installed apps are excluded. We report unique installs only. Android estimates do not include third-party stores. Market share is calculated among Messenger, Signal, Snapchat, Telegram, and WhatsApp only.

Sensor Tower Solutions



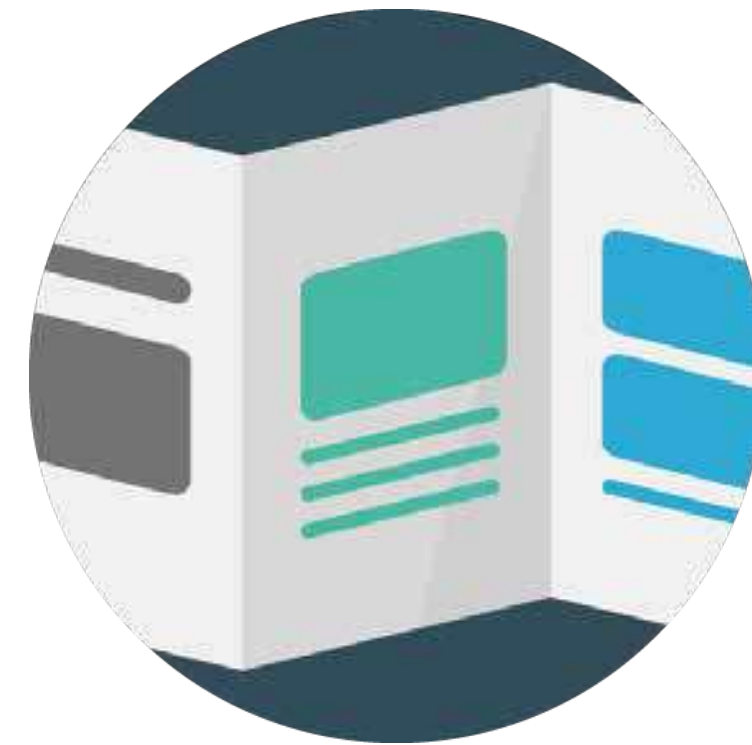
Store Intelligence

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



App Intelligence

Drive organic growth with the leading App Store Optimization platform.



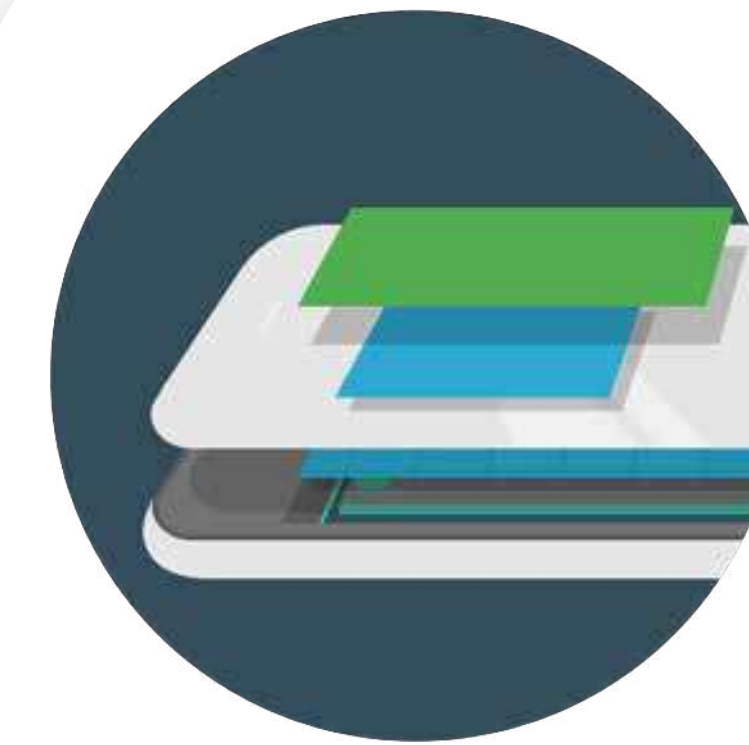
Ad Intelligence

Develop winning User acquisition campaigns with crucial mobile advertising insights.



Usage Intelligence

Benchmark app usage, engagement, and demographics.



App Teardown

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



Consumer Intelligence

Access unfiltered mobile user engagement for financial analysis.

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. © 2021.

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



