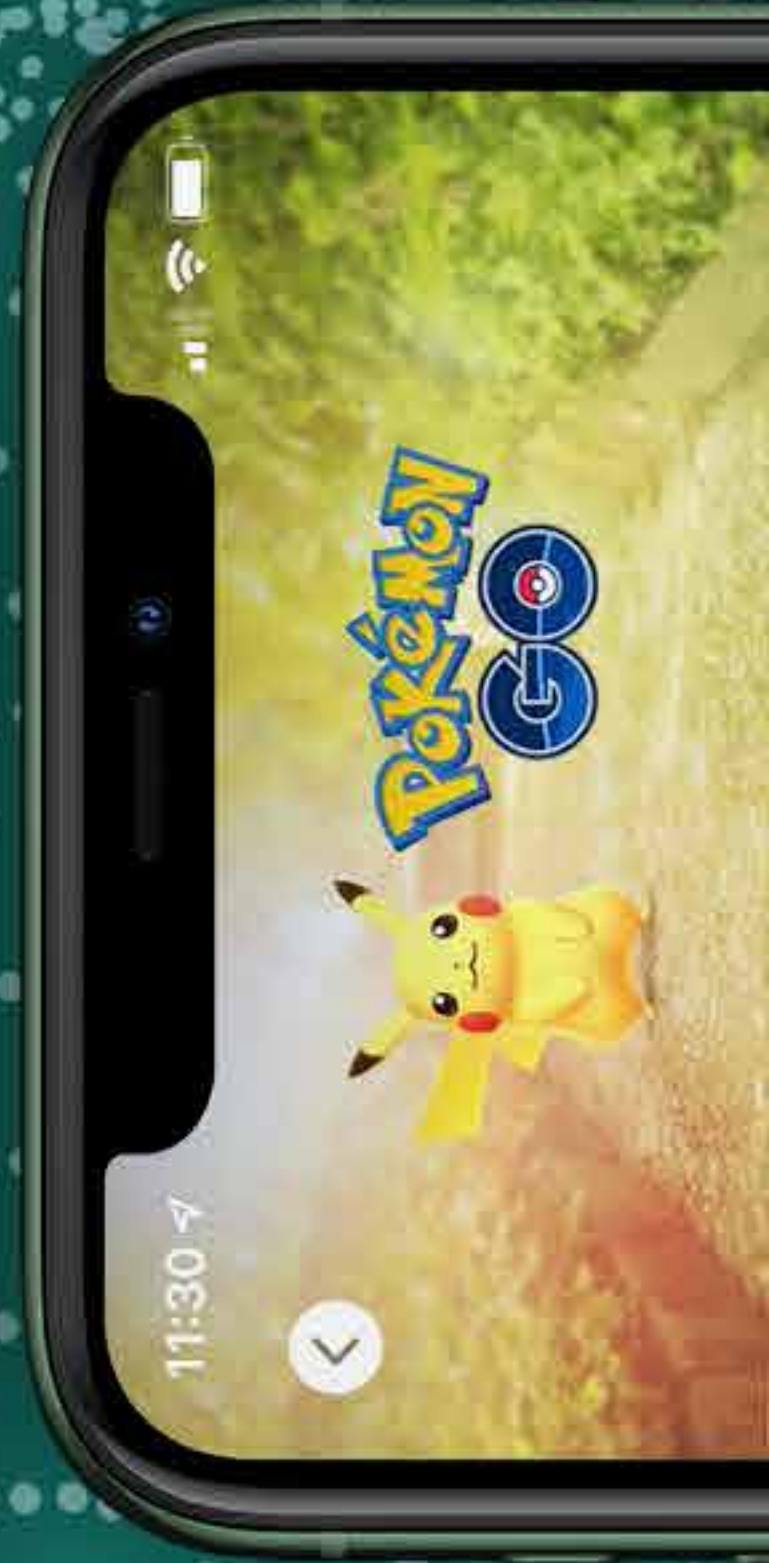
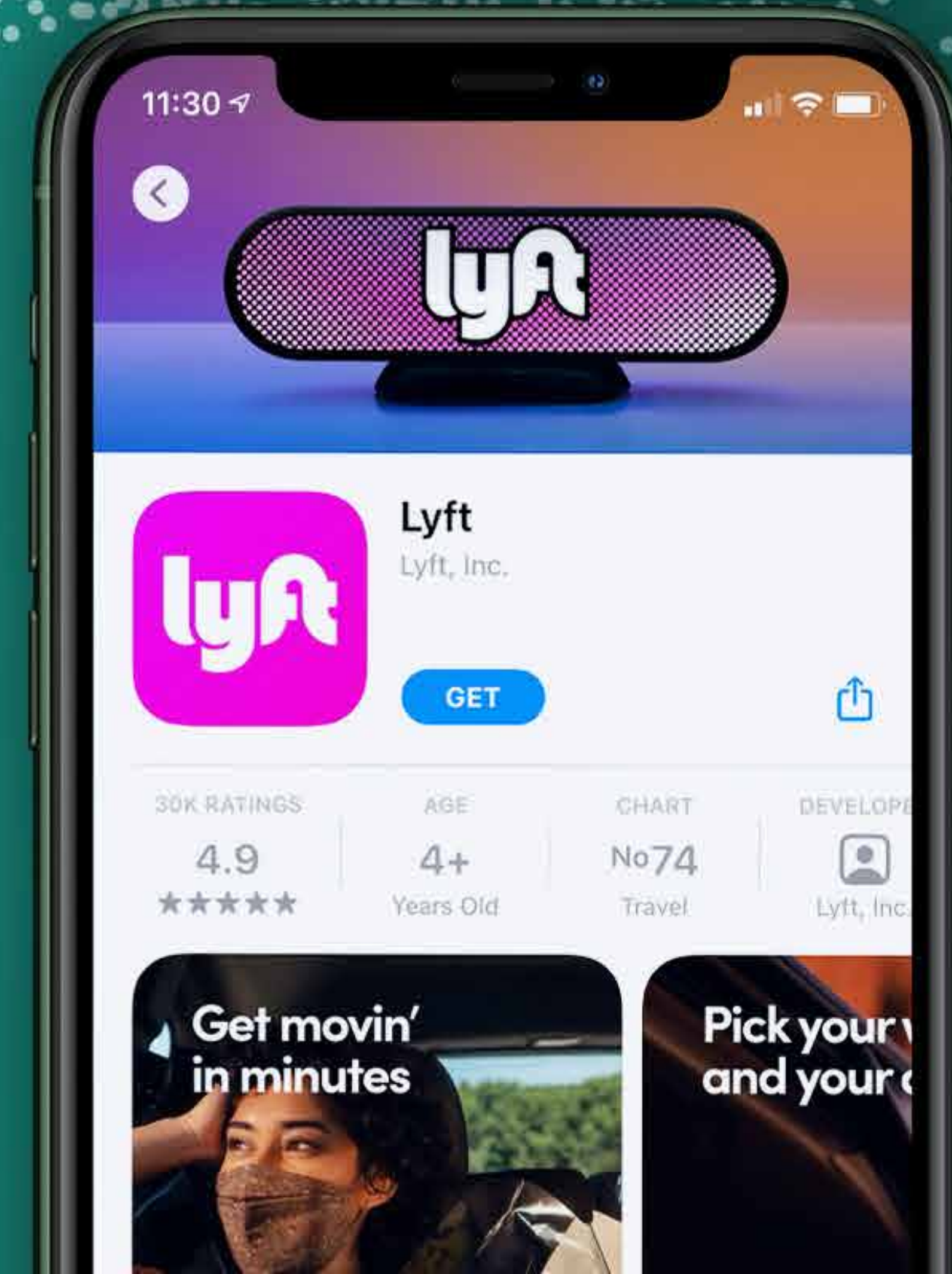
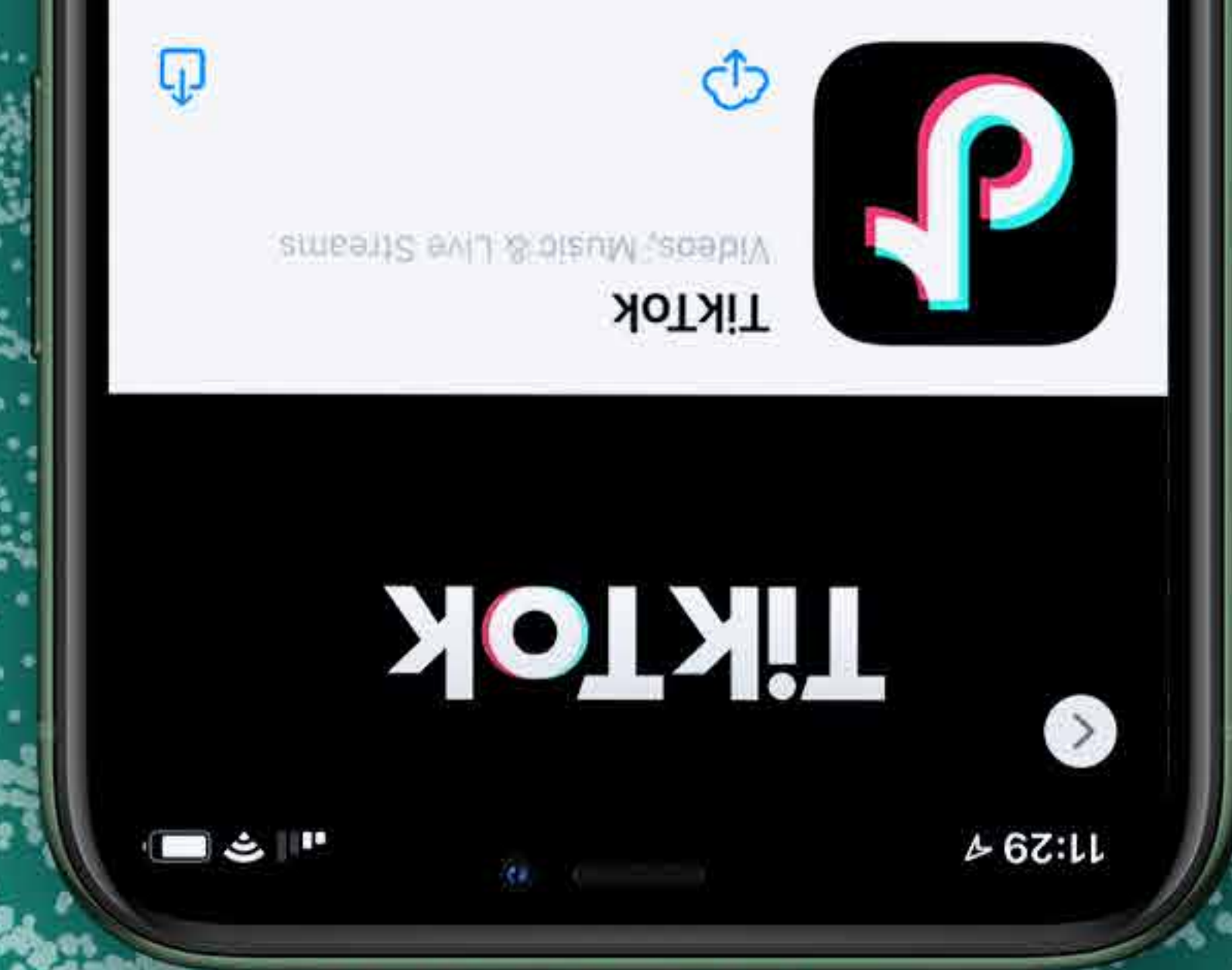




Q2 2021: Store Intelligence Data Digest

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



Executive Summary: Highlights



Worldwide app downloads totaled 35.9B in 2Q21, a 4.8% year-over-year decrease from the unusually high total of 37.7B in 2Q20 driven by COVID-19. App Store downloads fell 13.3% to 7.9B, while Google Play downloads dropped 2.1% to 28B.



Consumer spending in Niantic's Pokémon GO reached \$5 billion in the five years since its July 2016 launch. It became just the eighth mobile game ever to reach \$5 billion in gross revenue since the beginning of 2014.



TikTok was the top app by global downloads in Q2 2021, the fifth time in the past six quarters since the beginning of 2020. It reached 200 million quarterly installs for the first time since it was removed from India's app stores in Q2 2020.



The rollout of COVID-19 vaccines in the U.S. helped the demand for gig work apps return towards pre-pandemic levels. Uber provided incentives for drivers to address diverging adoption rates between its driver and consumer 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, 2014 through June 30, 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.

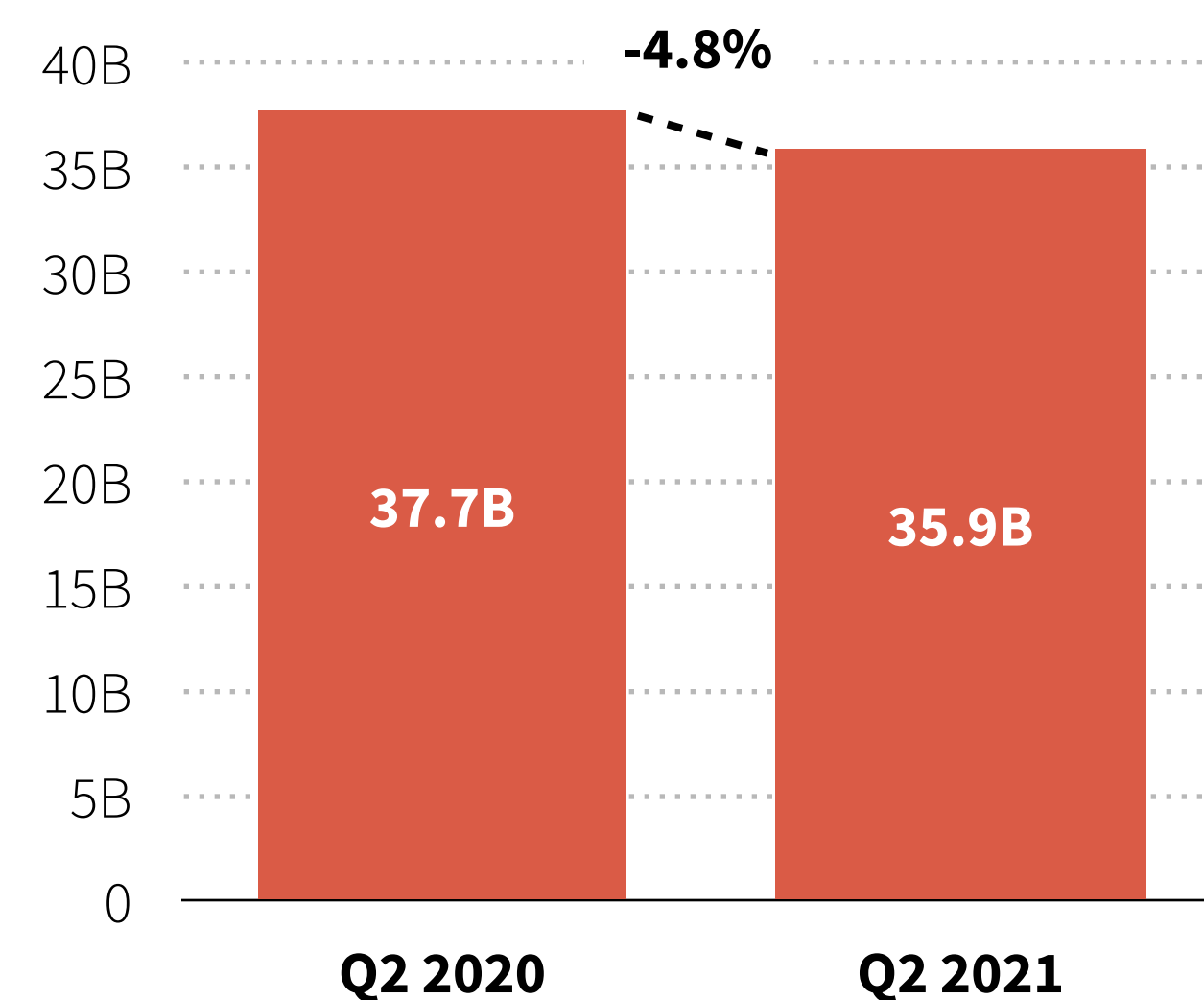
Could your business benefit from access to Store Intelligence insights and the highly accurate data used to build this report? See the fastest growing apps and publishers by downloads or revenue.

REQUEST DEMO

Market Overview:

Q2 2021 Worldwide Download Growth

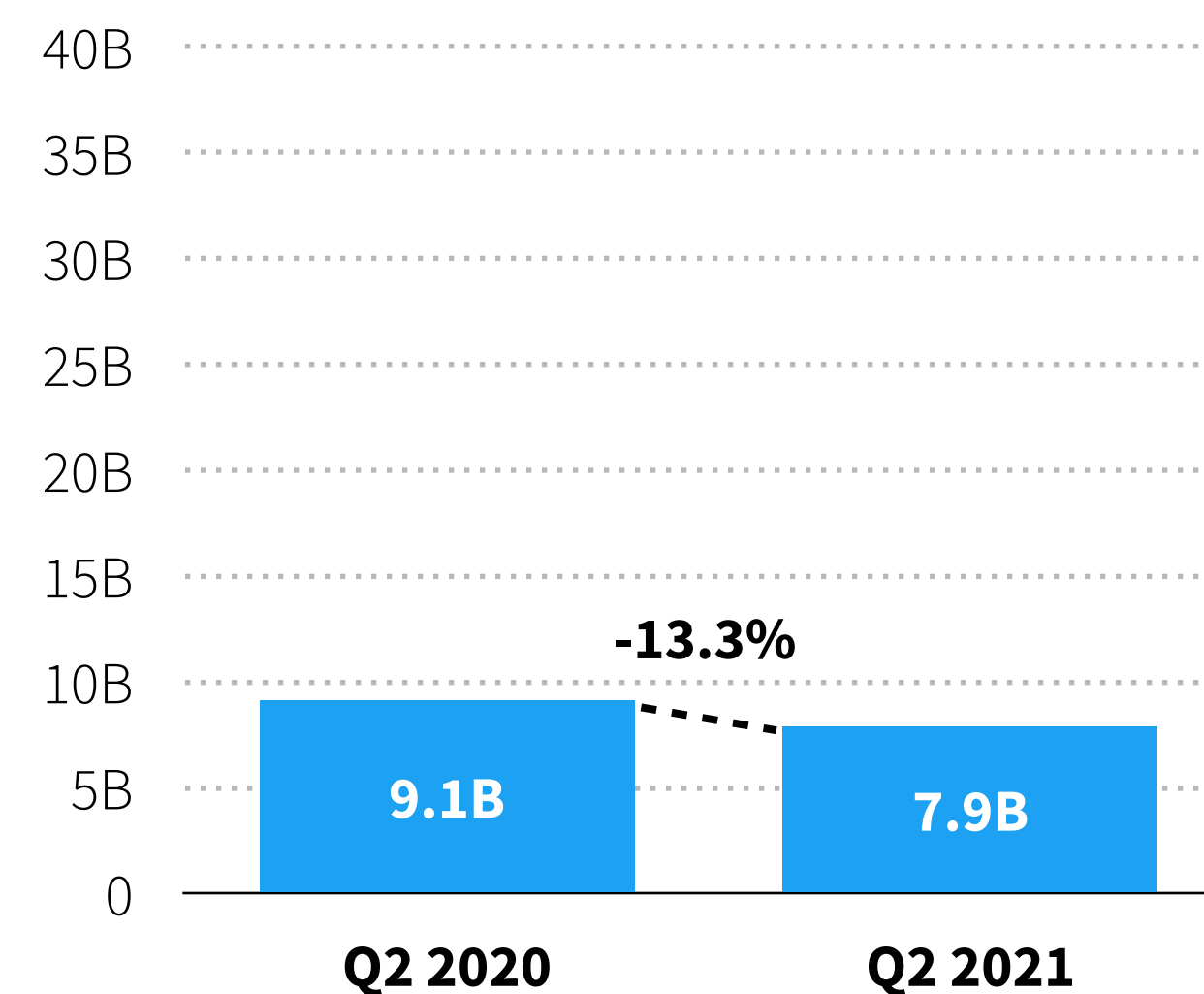
Worldwide App Store and Google Play Downloads



35.9 Billion

App Store + Google Play Downloads

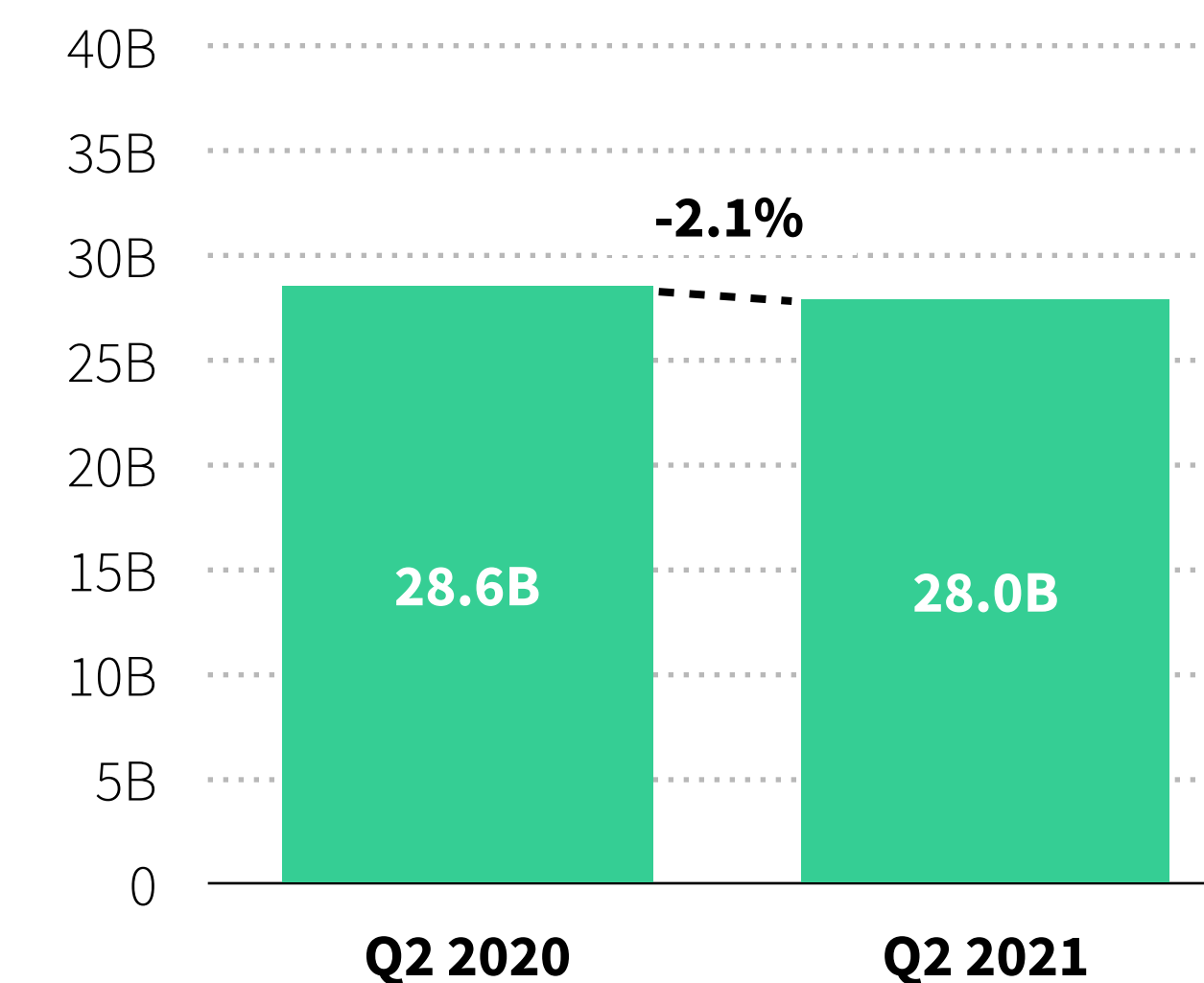
Worldwide App Store Downloads



7.9 Billion

App Store Downloads

Worldwide Google Play Downloads



28.0 Billion

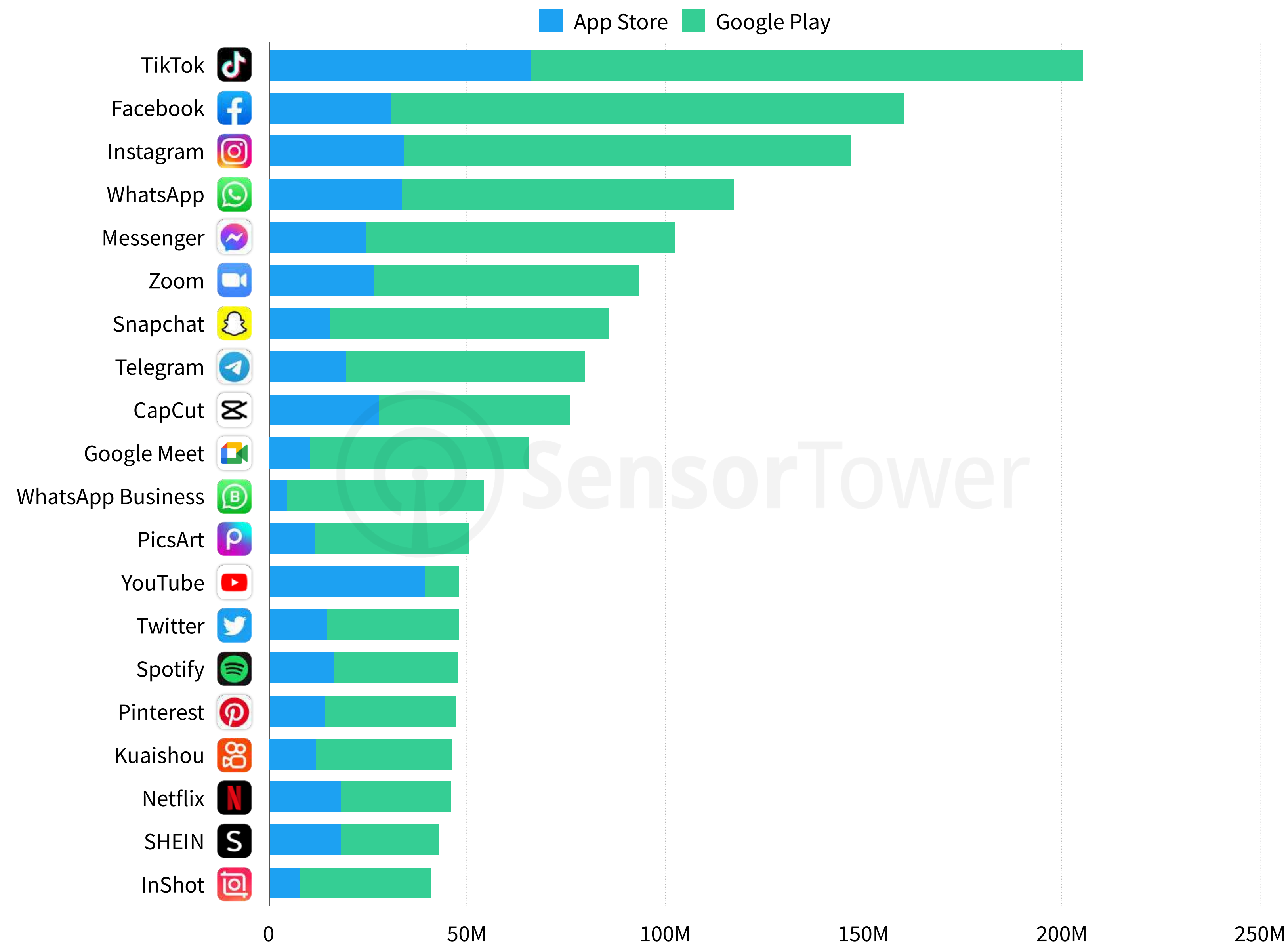
Google Play Downloads



Top Apps

Top Apps by Downloads in Q2 2021

Overall - Worldwide



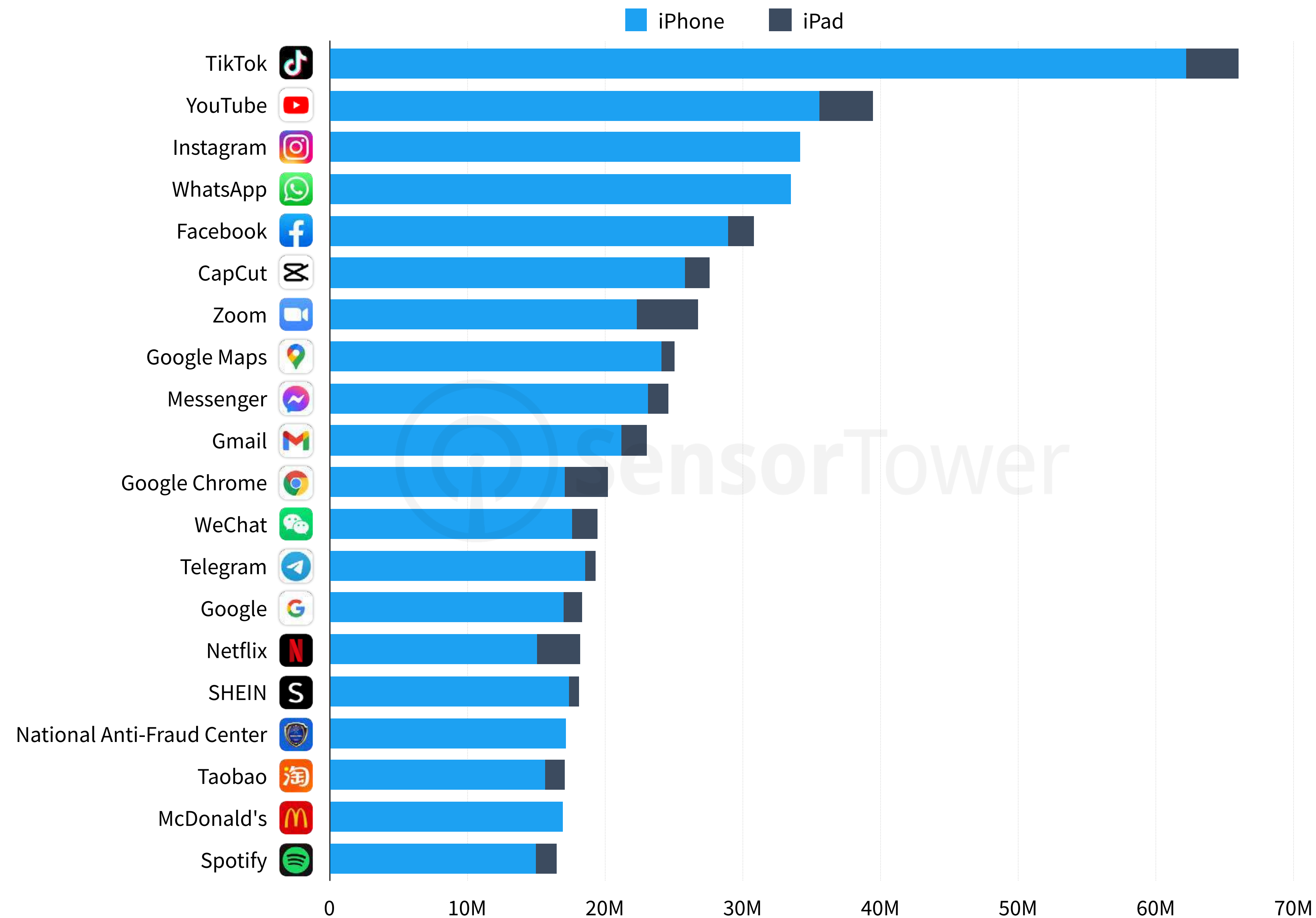
TikTok from ByteDance was the top app by global downloads in Q2 2021. It has held the No. 1 spot in five out of the past six quarters, and surpassed 200 million downloads for the first time since it was removed from the app store in India in 2Q20.

Facebook-published apps rounded out the rest of the top five apps. Zoom also had a strong quarter at No. 6, and it has ranked among the top 10 apps each quarter since the start of the pandemic in early 2020.

Note Regarding Download Estimates

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App Store - Worldwide



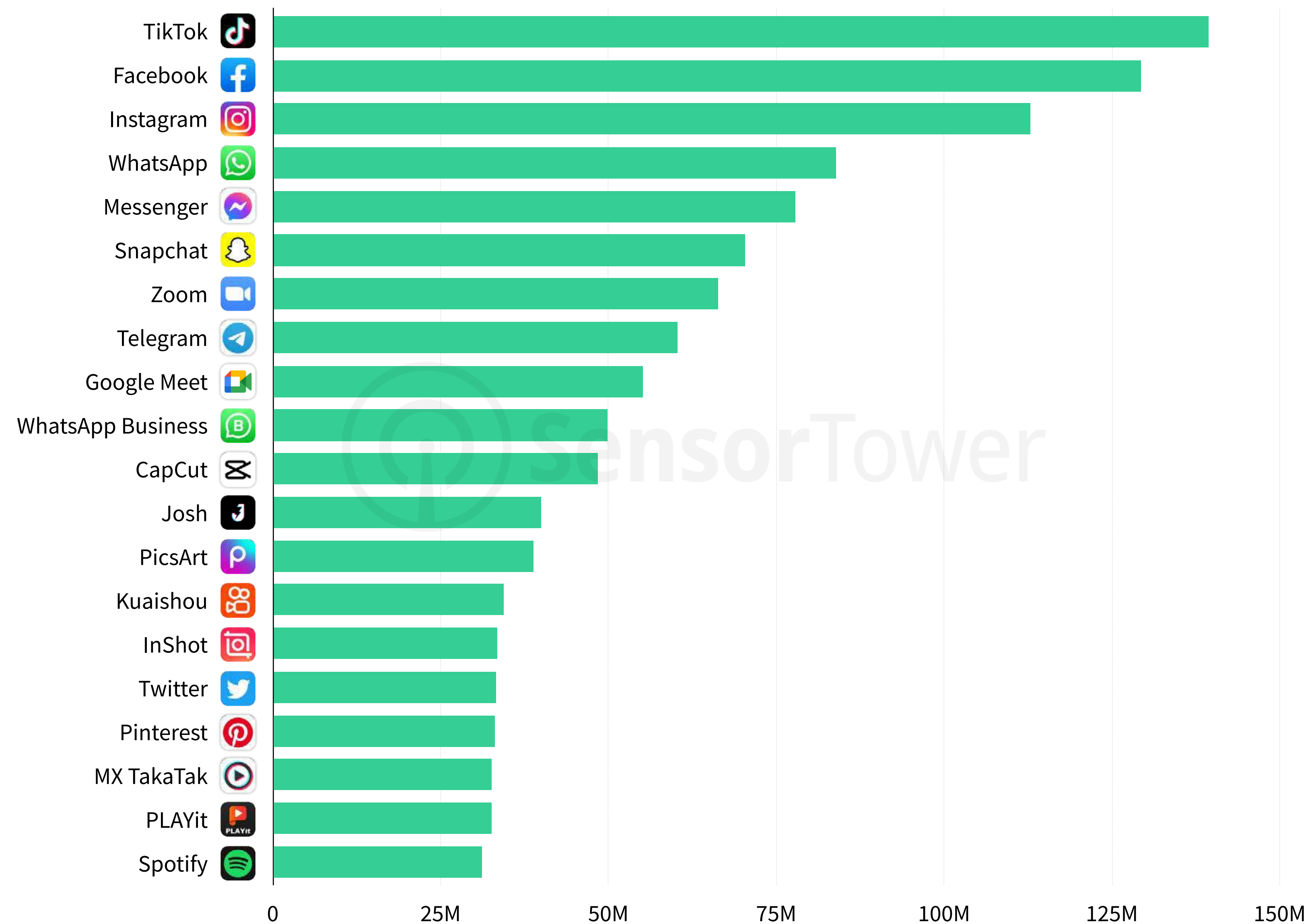
TikTok was also the top app by App Store downloads with 67 percent more downloads than the No. 2 app, YouTube. ByteDance also had another app, CapCut, among the top 10.

Google Maps had its best quarter on the App Store since before the pandemic as travel started to return in Q2 2021. It reached 25 million downloads in a quarter for just the second time ever.

Note Regarding Download Estimates

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Google Play - Worldwide



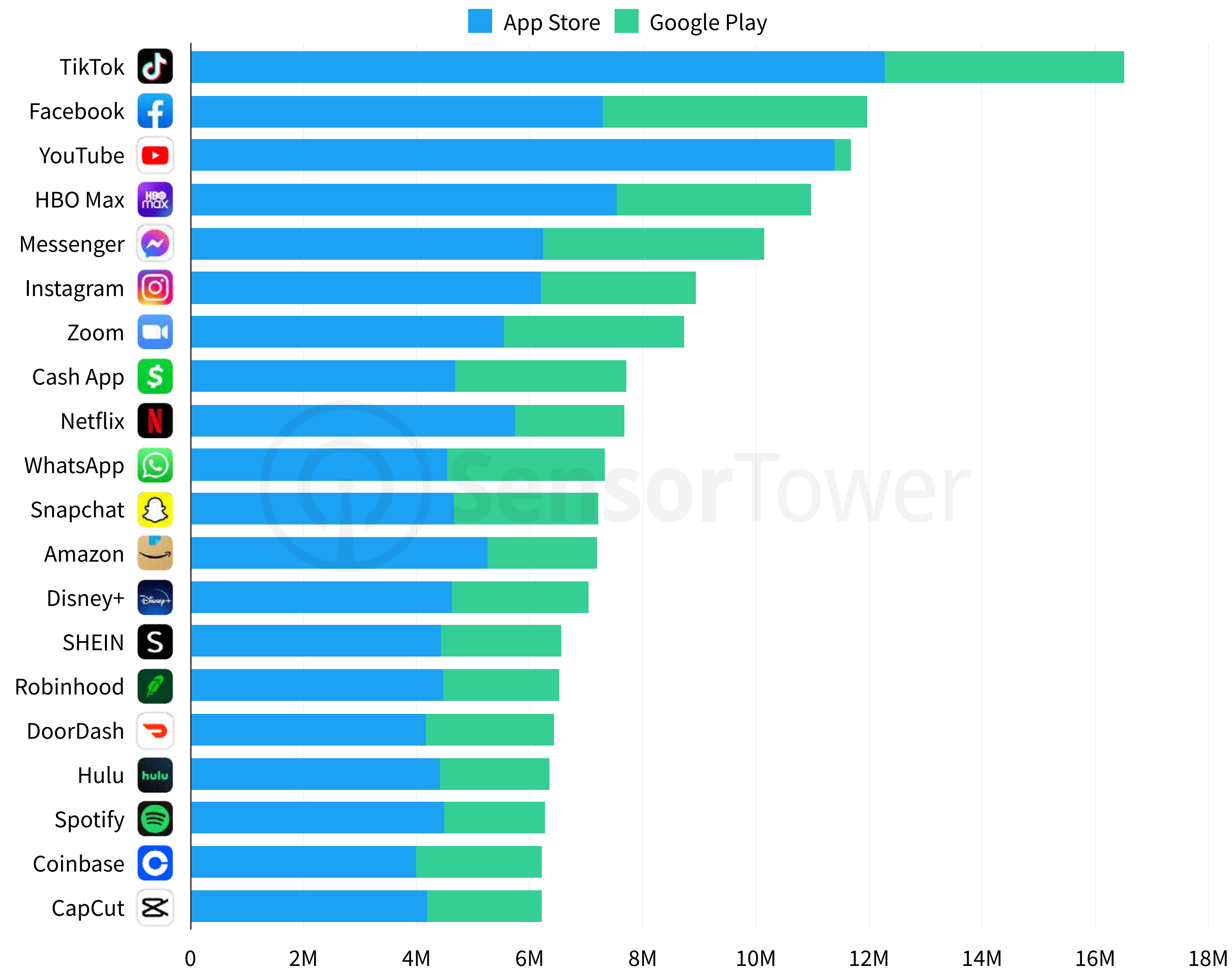
Some top video conferencing apps saw substantial quarter-over-quarter growth, particularly in India as COVID-19 restrictions increased there. Downloads for Zoom and Google Meet increased 119 percent Q/Q in India, though they were still well below the totals from Q2-Q3 2020.

Photo and video editors also had a strong quarter on Google Play. Some top apps included CapCut, PicsArt, and InShot.

Note Regarding Download Estimates

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Overall - United States



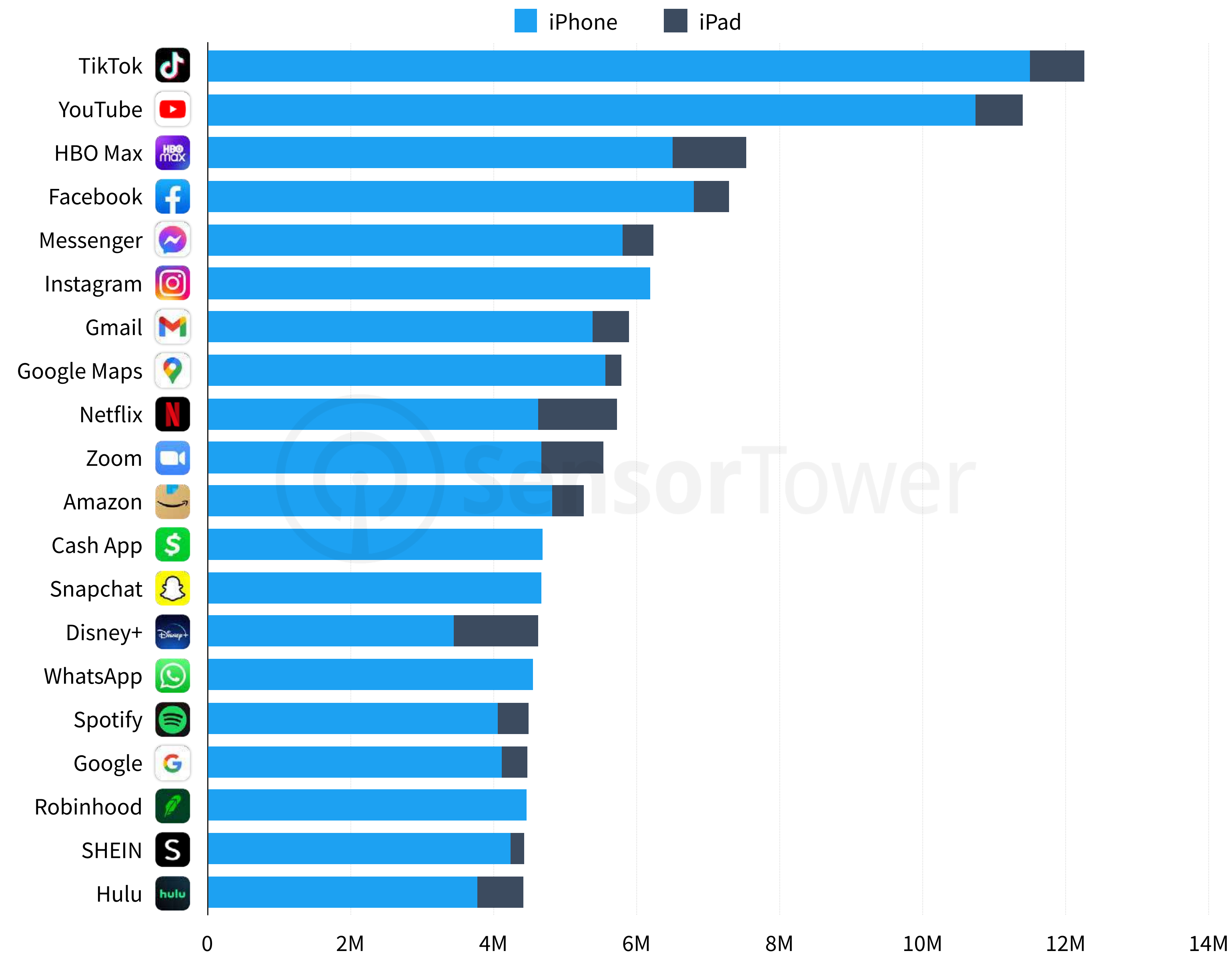
HBO Max continued to gain new users in the U.S., ranking as the No. 4 app in the quarter with an all-time high of nearly 11 million downloads. After surpassing top streaming apps like Netflix and Disney+ for the first time in Q1 2021, it expanded the gap in Q2.

The high demand for cryptocurrency helped Coinbase rank among the top 20 apps in the U.S. for the first time in Q2 2021 with 6.2 million downloads.

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App Store - United States



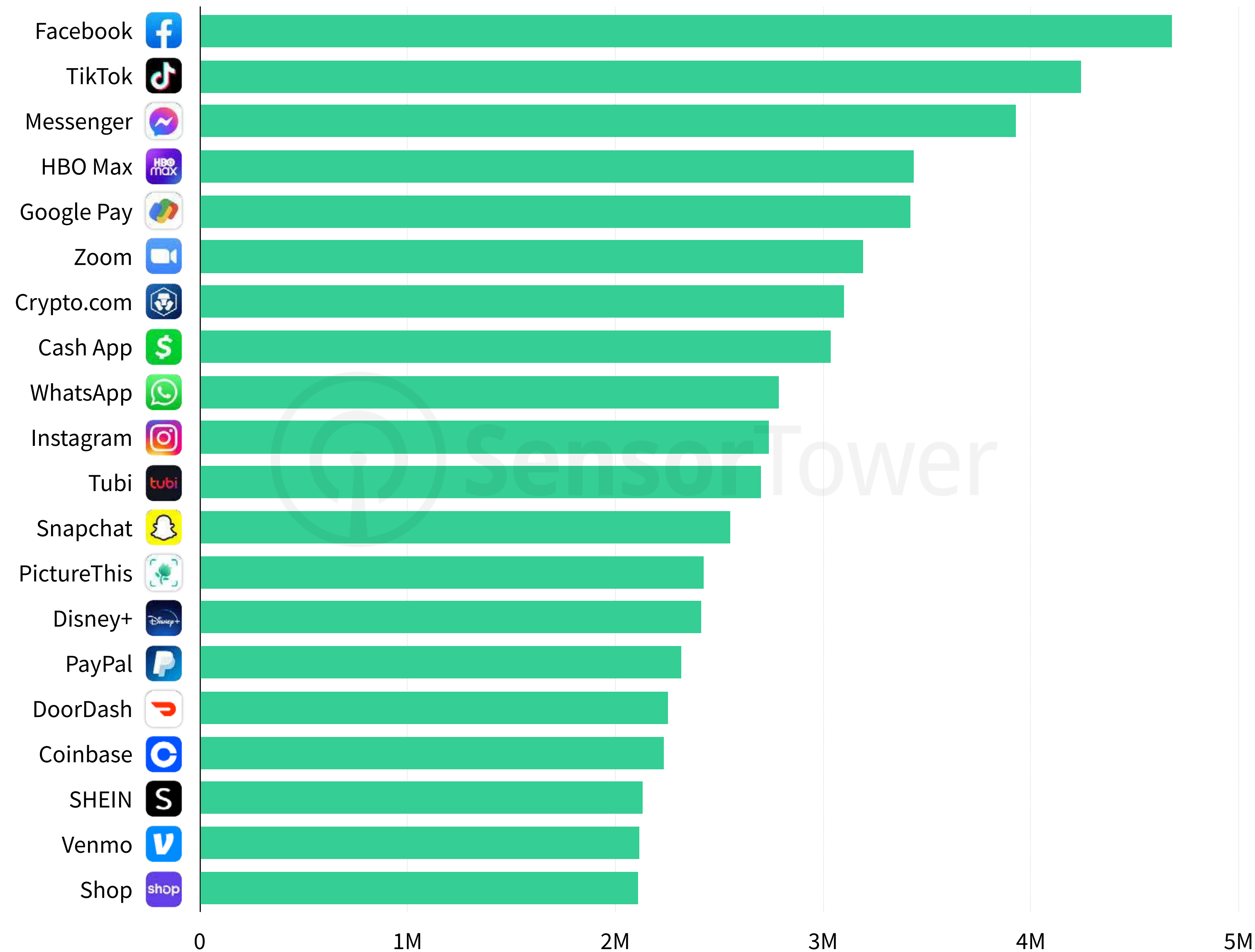
TikTok and YouTube each surpassed 10 million U.S. installs on iOS in Q2 2021. Since the start of 2020, Zoom has been the only other app to reach that threshold.

Despite more businesses reopening in the U.S. as COVID-19 vaccines became available, Zoom still managed to return the top 10 apps on the App Store. Zoom had ranked No. 3 in Q1 2021 and No. 1 in each of the three quarters before that.

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Google Play - United States



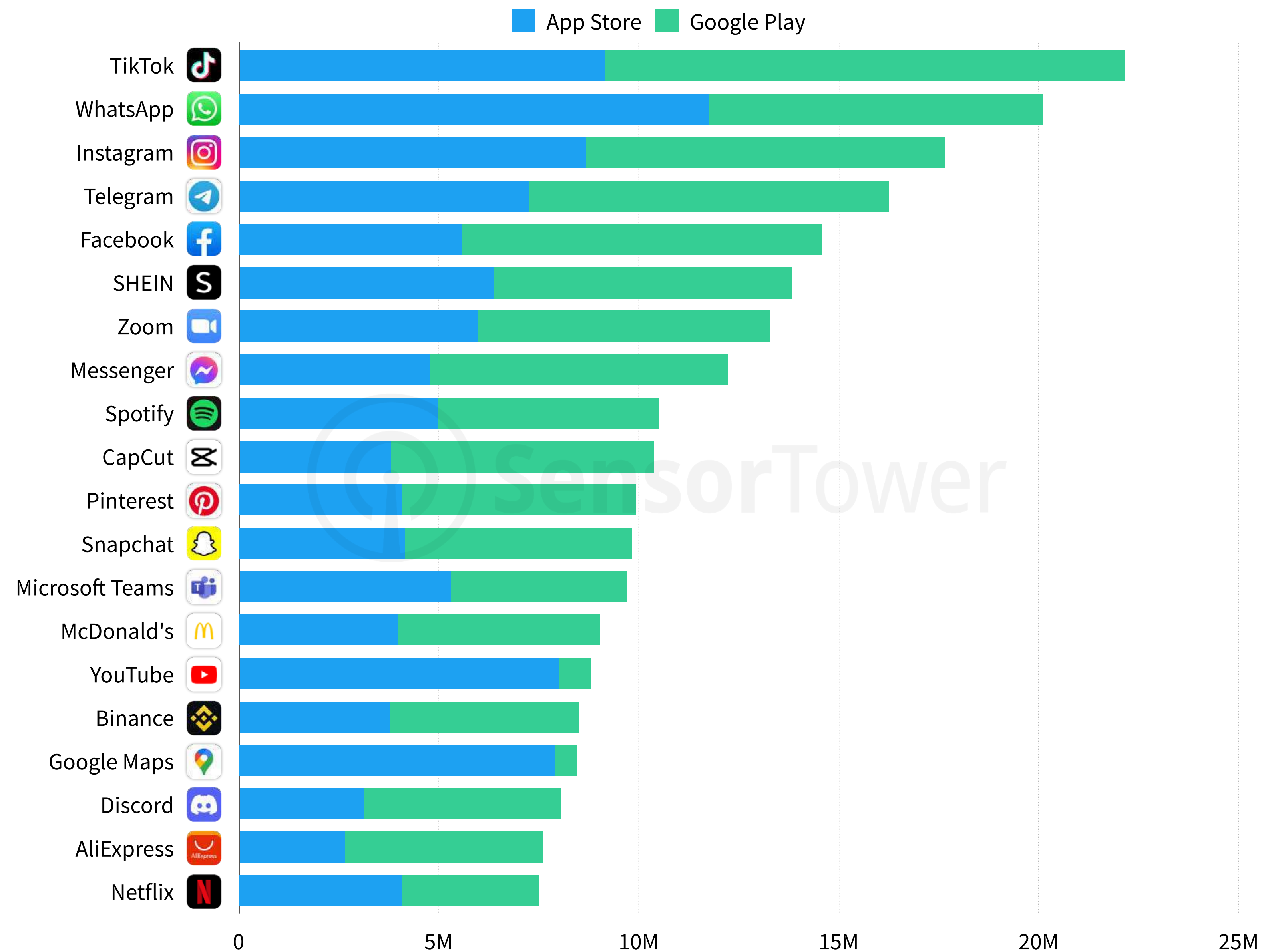
Facebook was the No. 1 app in the U.S. on Google Play. It had its best quarter by U.S. adoption since three years prior in Q2 2018.

Finance apps built on the gains in Q1 2021 when the category had four of the top 20 apps. Crypto.com had more than half of its all-time downloads in Q2 2021, and only PictureThis had more quarter-over-quarter growth among non-game apps.

Note Regarding Download Estimates

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Overall - Europe



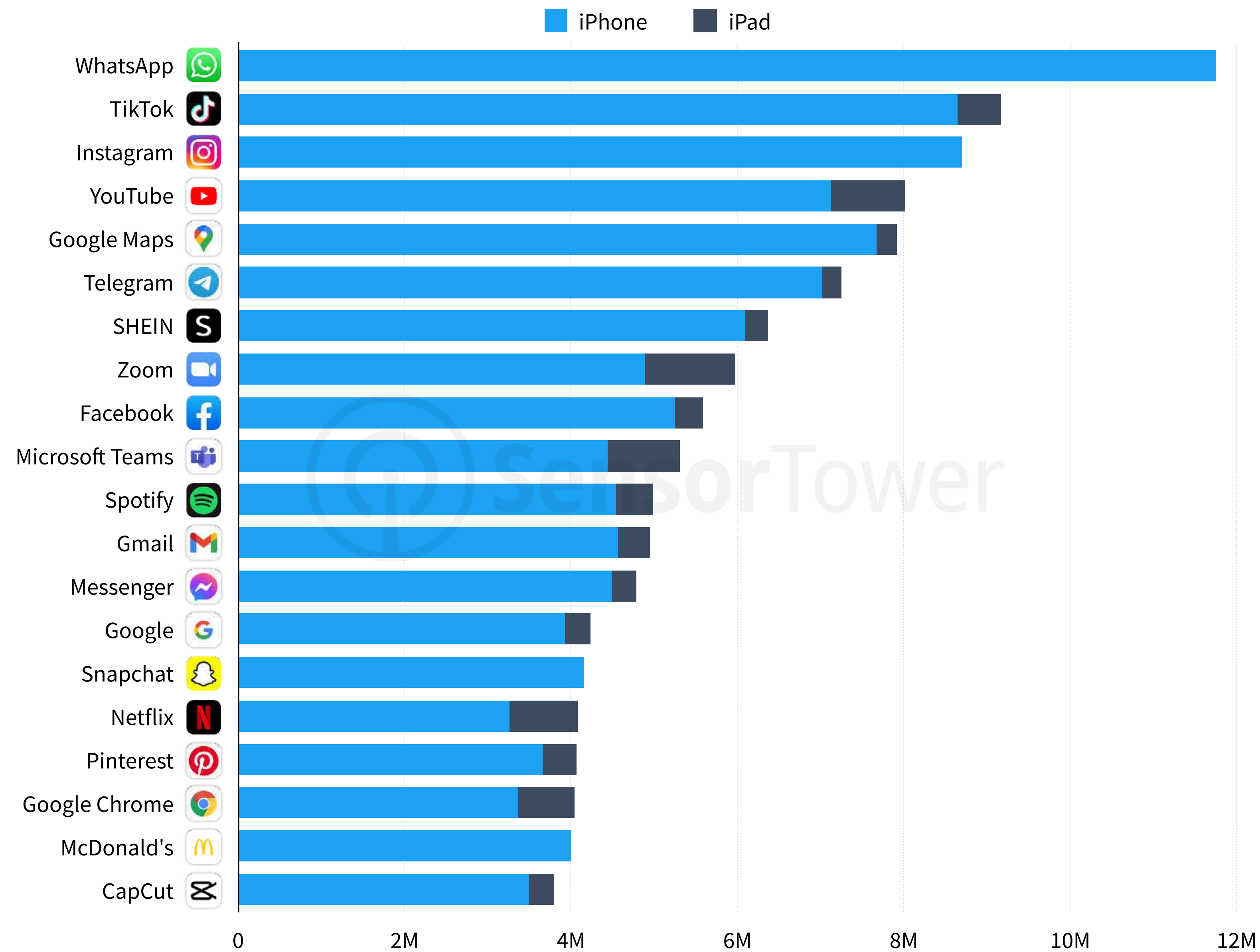
TikTok was the top app by adoption in Europe for the fourth consecutive quarter. Besides TikTok, Zoom was the last app to rank No. 1 in Q2 2020.

SHEIN, a top online shopping app focusing on women's clothing, had its best quarter in Europe yet with 13.8 million downloads. Europe accounted for nearly a third of SHEIN's downloads in Q2 2021.

Note Regarding Download Estimates

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App Store - Europe



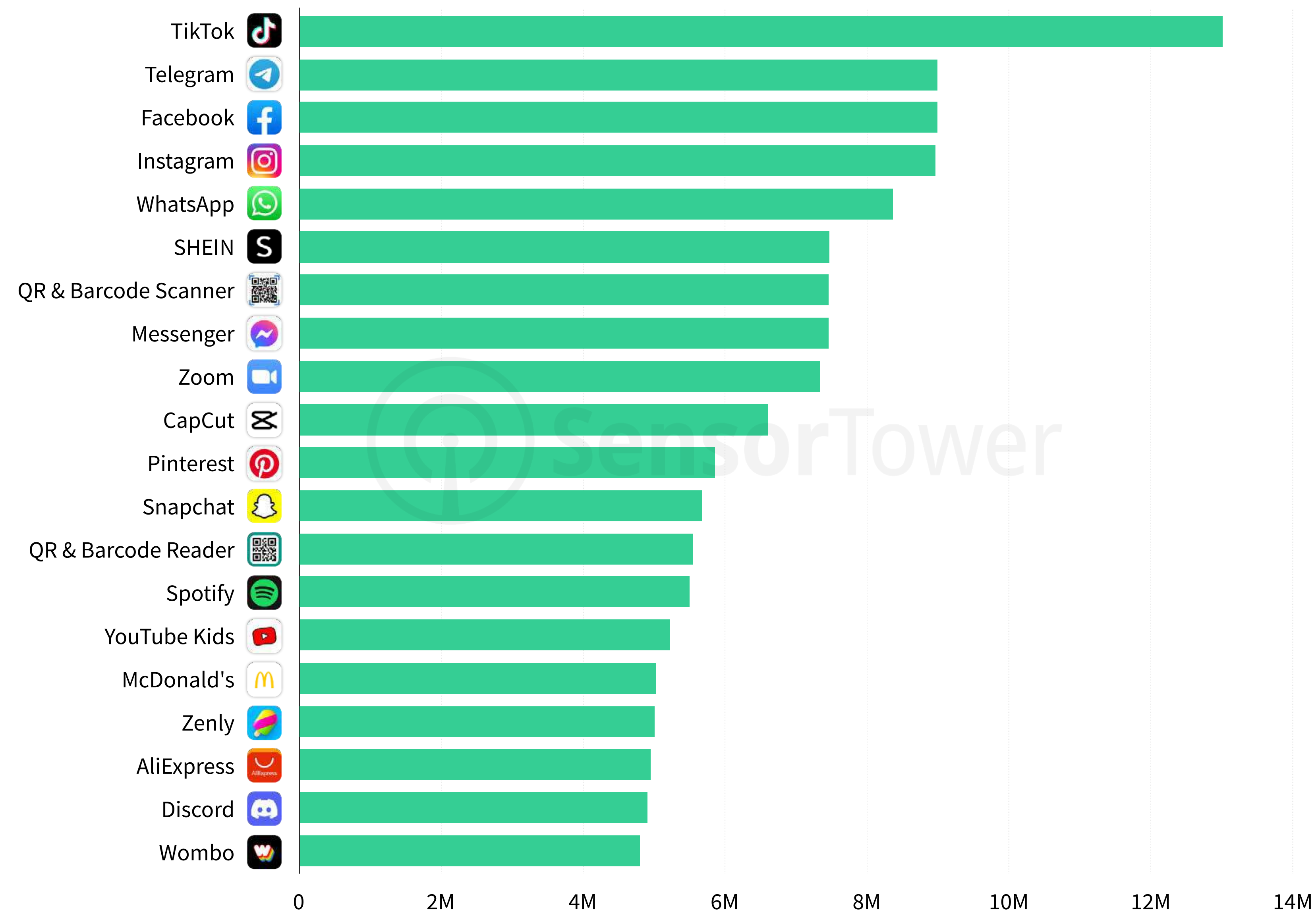
WhatsApp was the top app on the App Store in Europe in Q2 2021, followed by TikTok and Instagram. Top European markets for WhatsApp included Russia, the U.K., and Turkey.

On the App Store, 15 of the top 20 apps by European downloads were from United States-based publishers. Google alone had five apps among the top 20, and Facebook had another four.

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Google Play - Europe



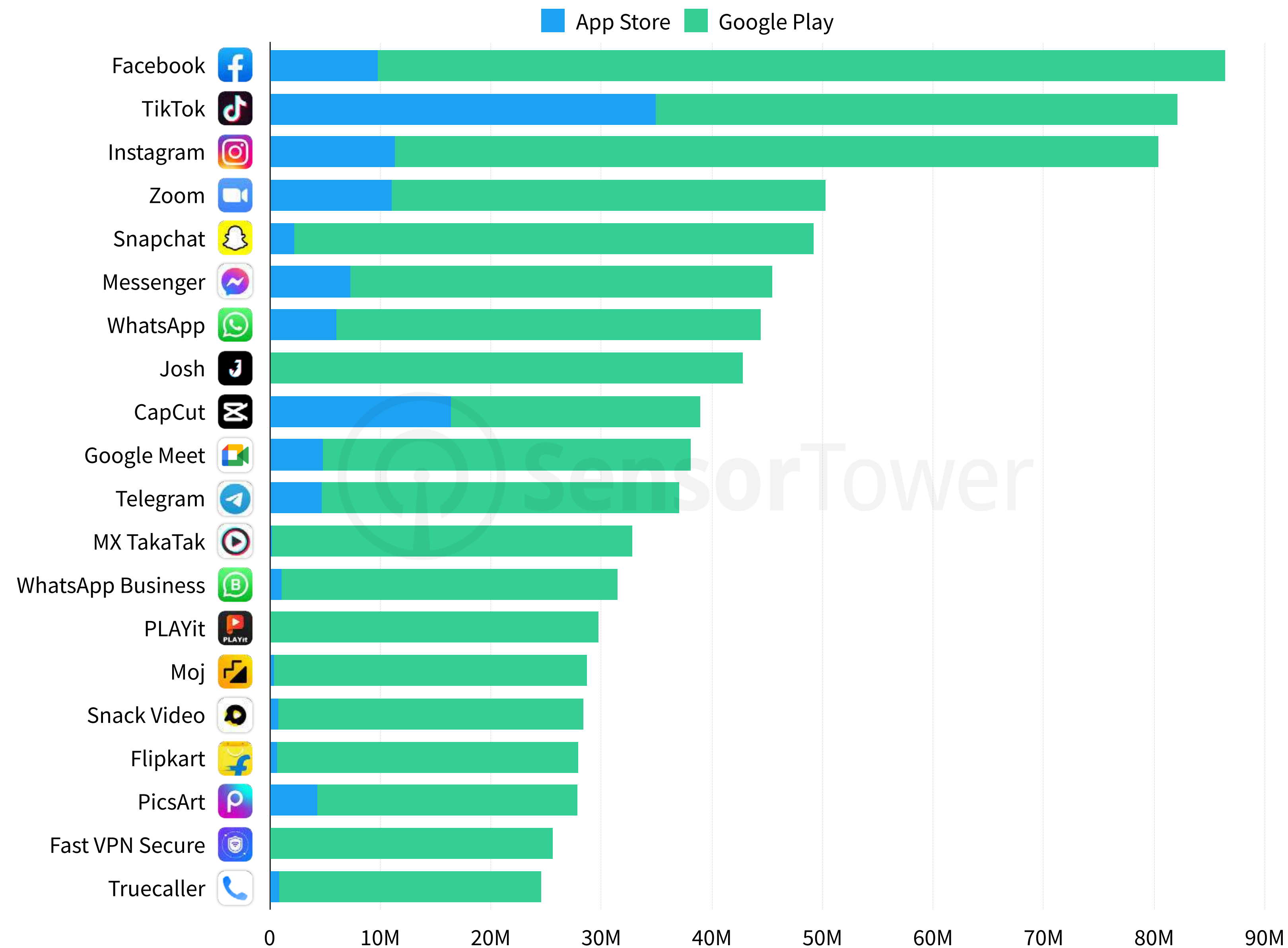
The top five apps were the same as the previous quarter, with the exception of Instagram replacing Zoom. TikTok was well ahead of the rest with 13 million European new installs on Google Play.

Zenly and Wombo were two new entrants to the top 20 in Q2 2021. Zenly is a location tracking app that gained popularity as COVID-19 restrictions loosened. Its installs more than doubled quarter-over-quarter.

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Overall - Asia



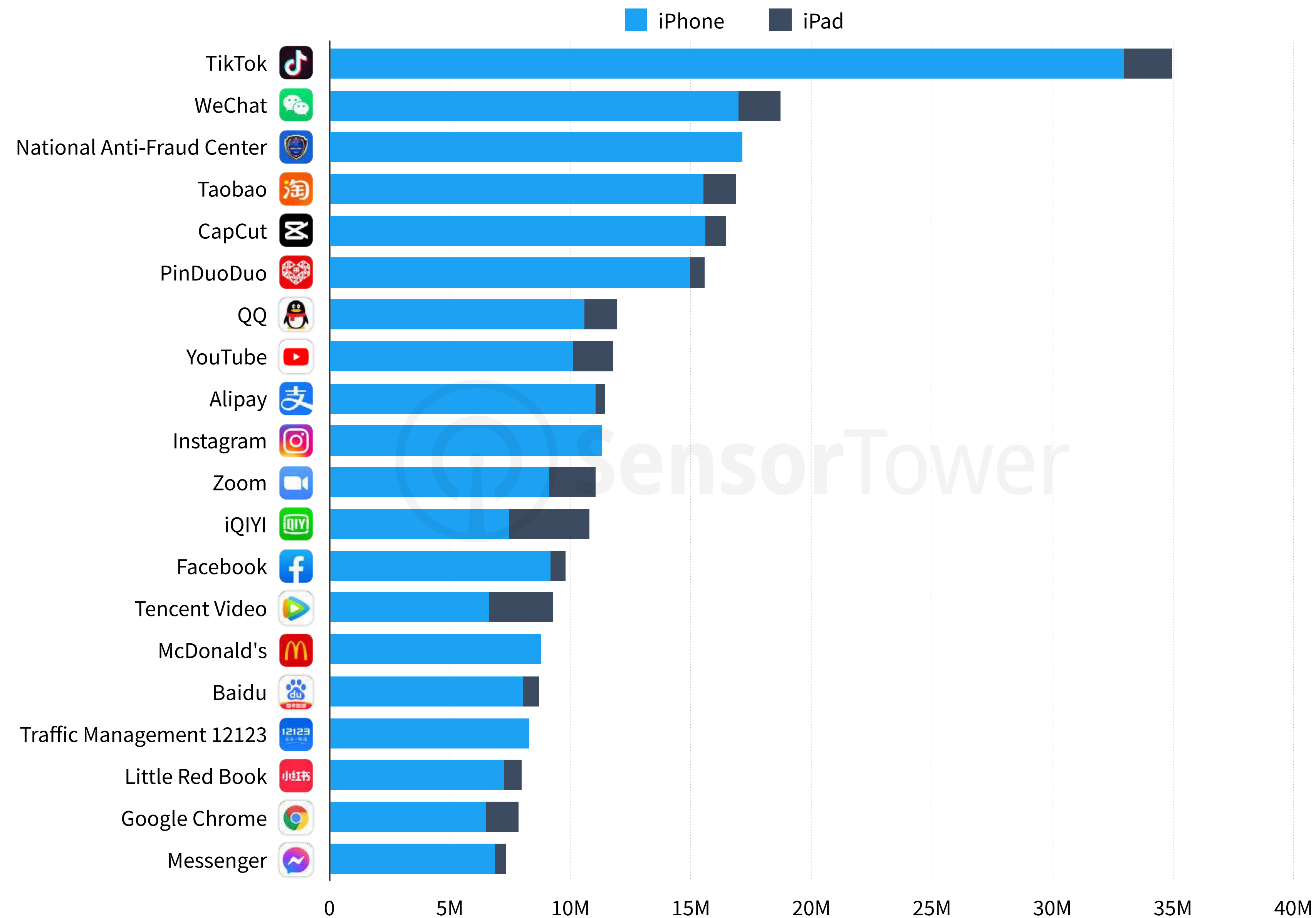
Facebook became the top app in Asia in Q2 2021, passing MX TakaTak and Instagram compared to the prior quarter. Facebook, TikTok, and Instagram each surpassed 80 million downloads in the quarter, while Zoom ranked No. 4 with 50 million downloads.

The influx of short video apps looking to replace TikTok in India slowed in 2Q21. MX TakaTak, Moj, and Josh had ranked among the top 10 apps in Q1 2021. Of those, only Josh returned to the top 10 in Q2 2021.

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App Store - Asia



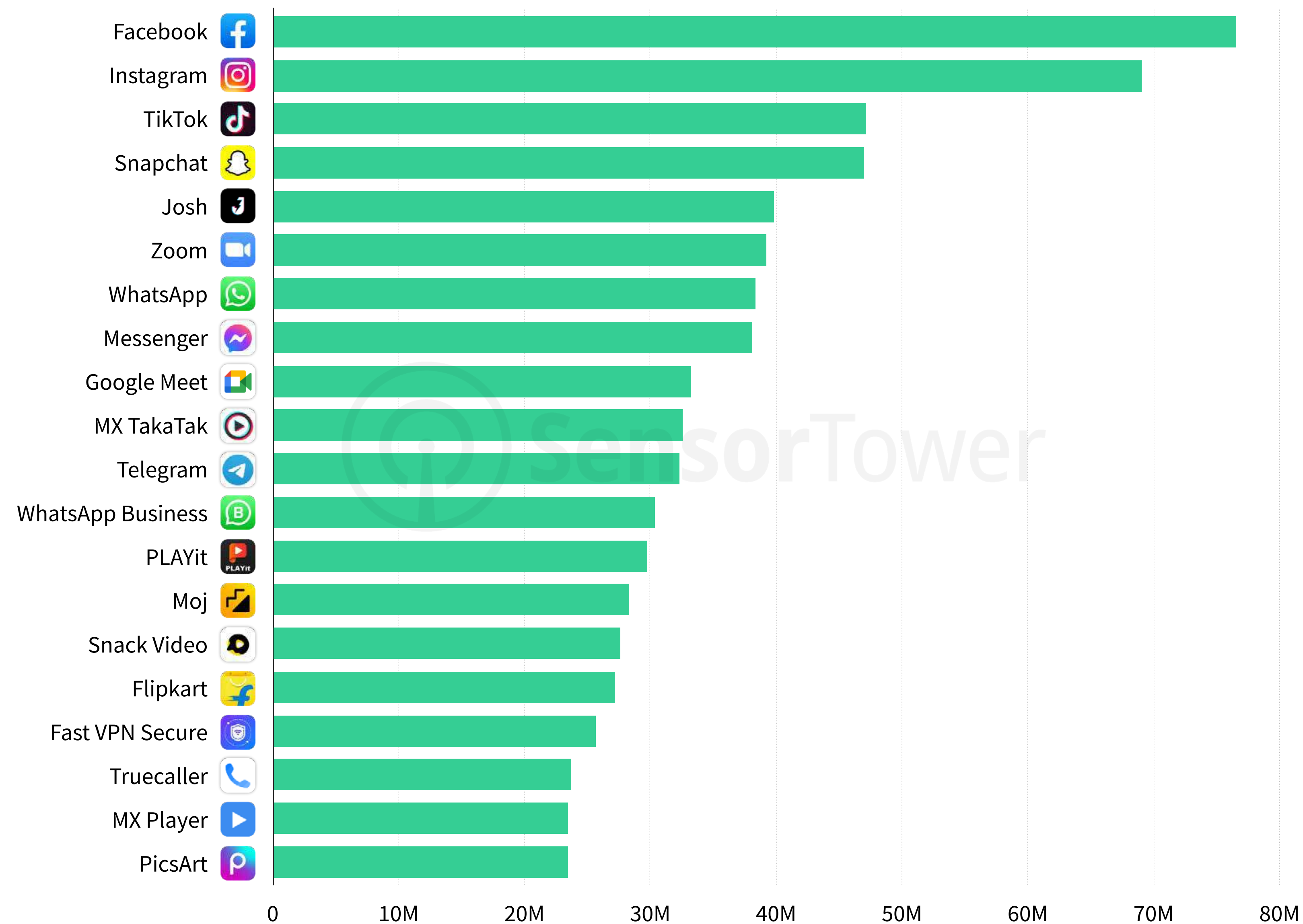
TikTok, known as Douyin in China, had nearly twice as many downloads as the No. 2 app, WeChat. China accounted for 72 percent of TikTok's App Store downloads in Asia in Q2 2021, followed by Vietnam.

The top apps were similar to last quarter, with TikTok, WeChat, Taobao, and CapCut each returning to the top five. China's National Anti-Fraud Center app from the Ministry of Public Security was the lone new entrant to the top five in 2Q21.

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Google Play - Asia



Facebook had the top two apps in Asia on Google Play with Facebook and Instagram.

India accounted for 56 percent of Google Play installs in Asia for the Facebook app, and nearly 70 percent of installs for Instagram.

TikTok moved up seven spots from Q1 2021 to rank No. 3 in 2Q21 with 47 million installs in Asia. This was despite it being banned in India, by far the largest market for Google Play.

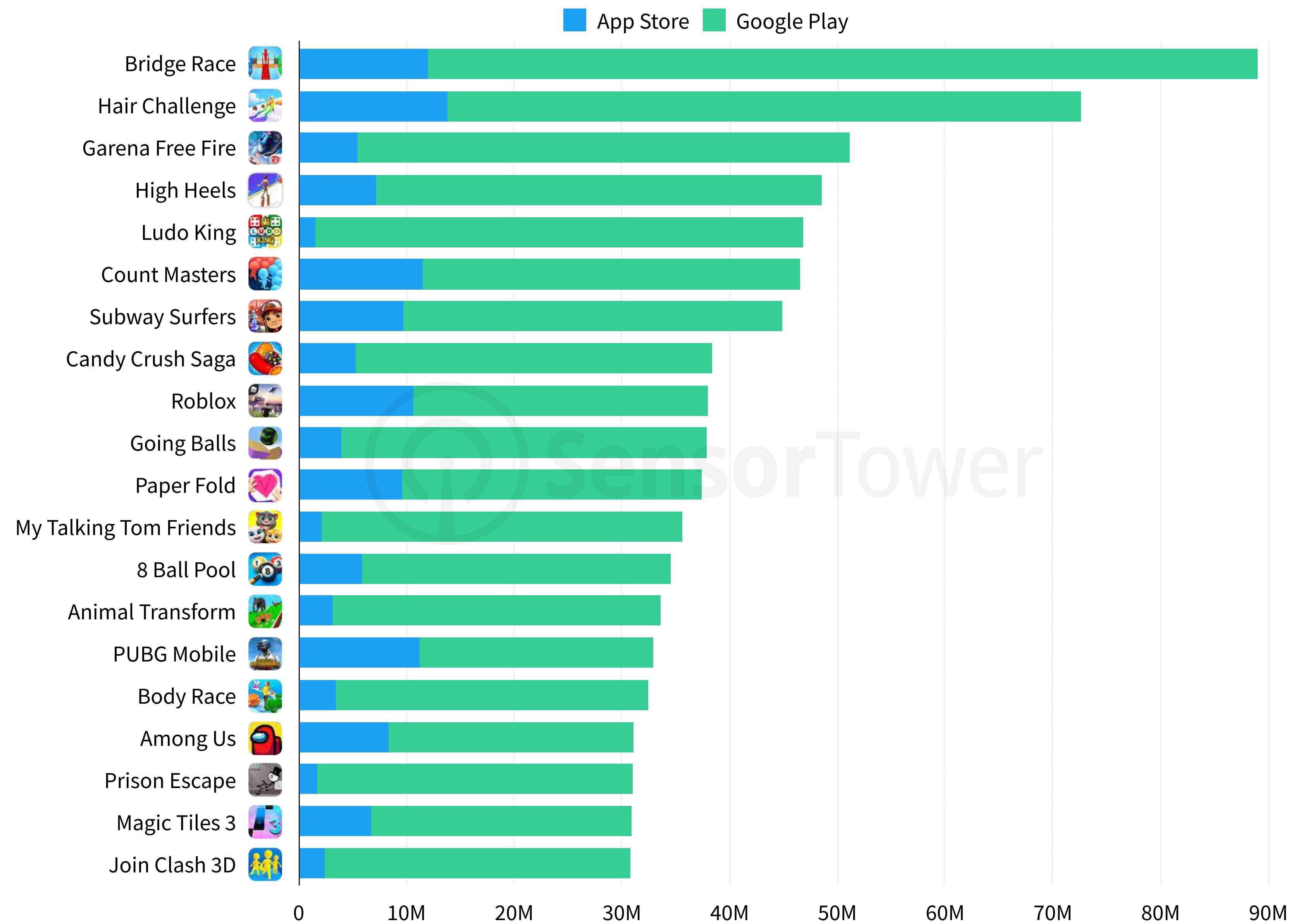
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Top Games

Top Games by Downloads in Q2 2021

Overall - Worldwide



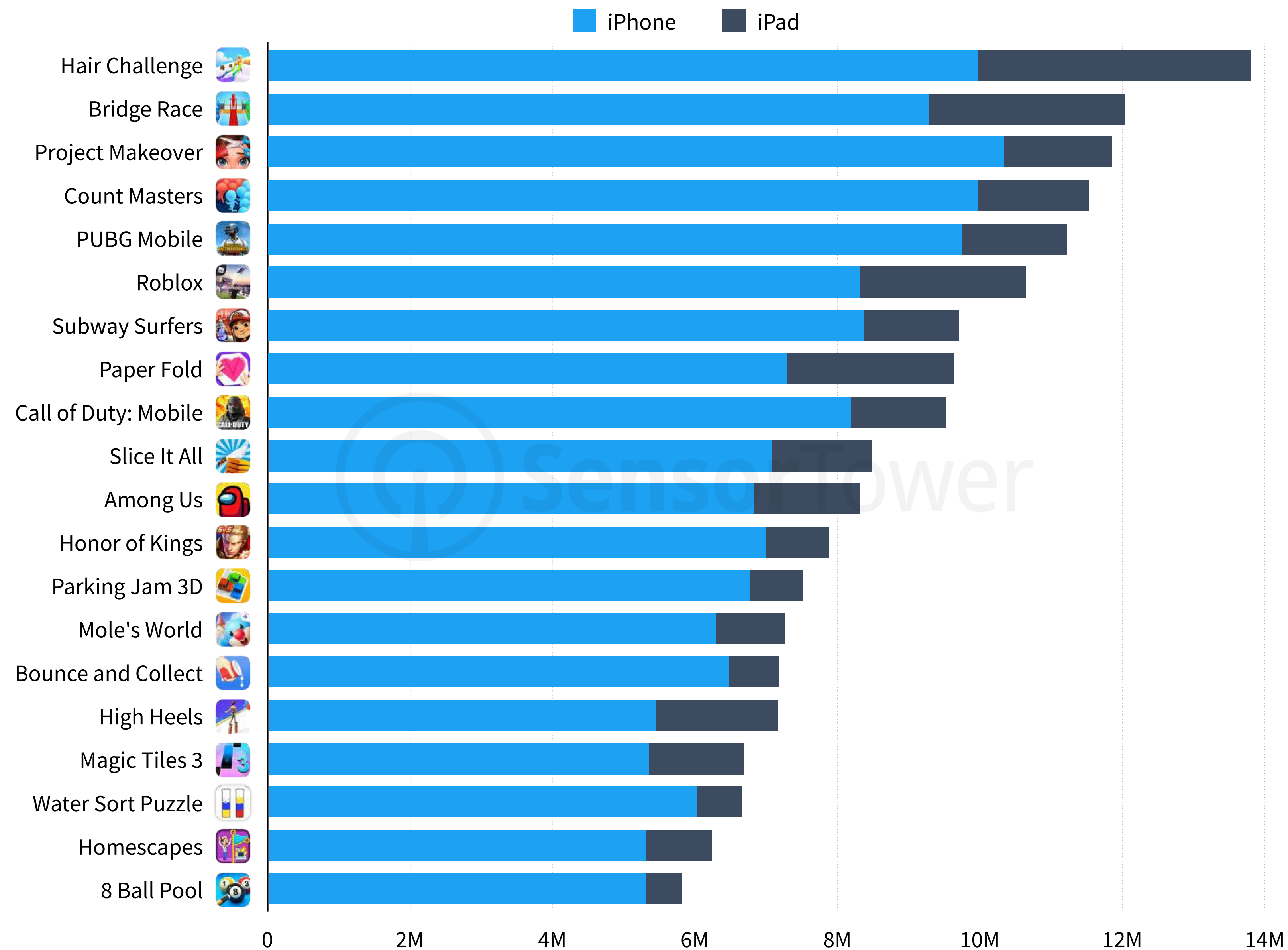
Bridge Race from Supersonic Studios was the most downloaded mobile game globally in Q2 2021 with nearly 90 million installs. Zynga had two games among the top five with Hair Challenge and High Heels.

Garena Free Fire ranked among the top five mobile games by worldwide downloads for the fifth consecutive quarter. Among Us was the only other game to rank among the top five in even three of these quarters.

Note Regarding Download Estimates

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App Store - Worldwide



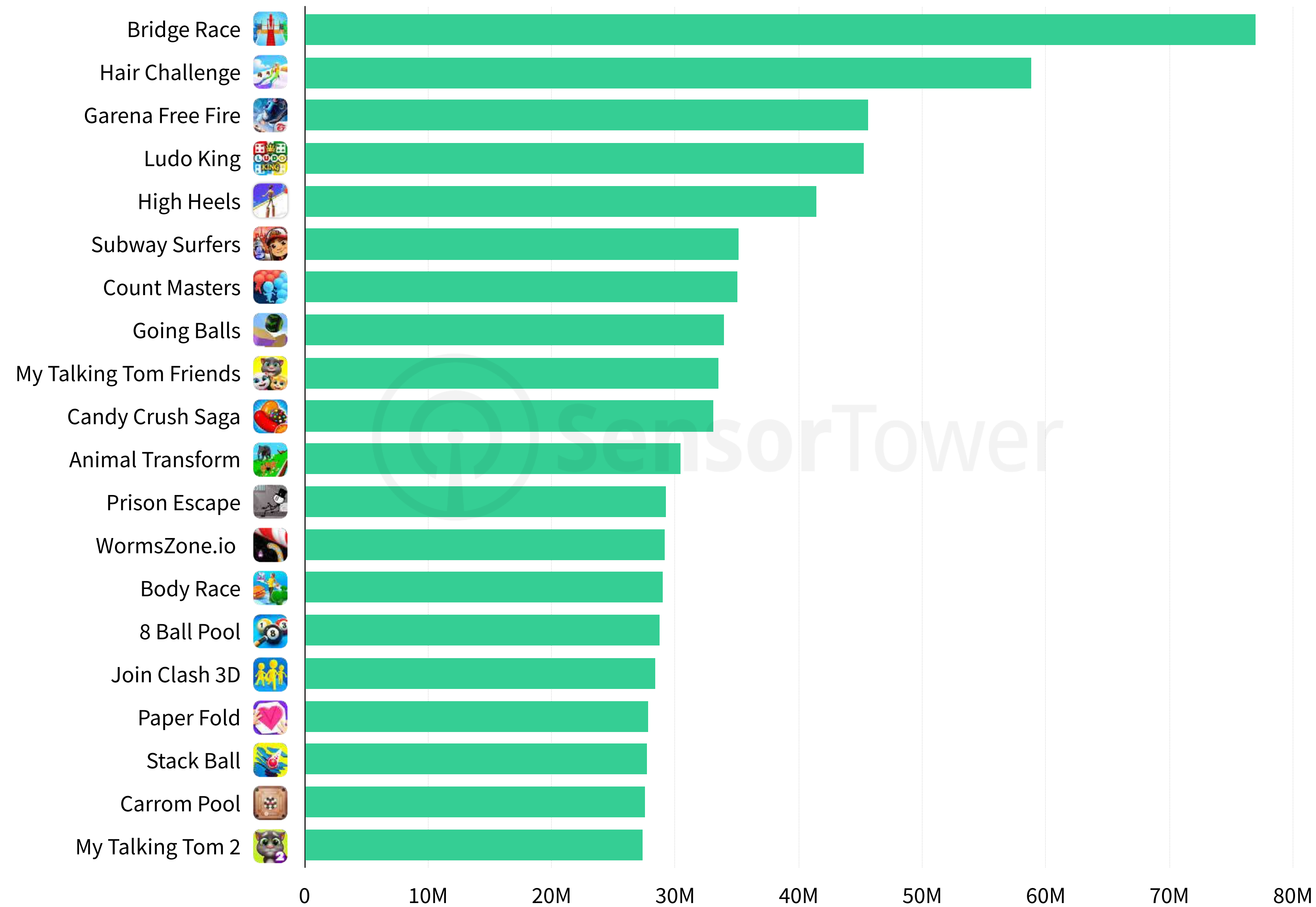
On the App Store, Hair Challenge from Zynga-owned Rollic Games was the top game by downloads in Q2 2021. Bridge Race, Count Masters, Paper Fold, and Slice It All were other top Hypercasual games.

Tencent's PUBG Mobile has been remarkably consistent on the App Store, ranking as the No. 5 or 6 app each of the past four quarters. In Q2 2021, 39 percent of its App Store downloads came from China, where it is localized as Game for Peace.

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Google Play - Worldwide



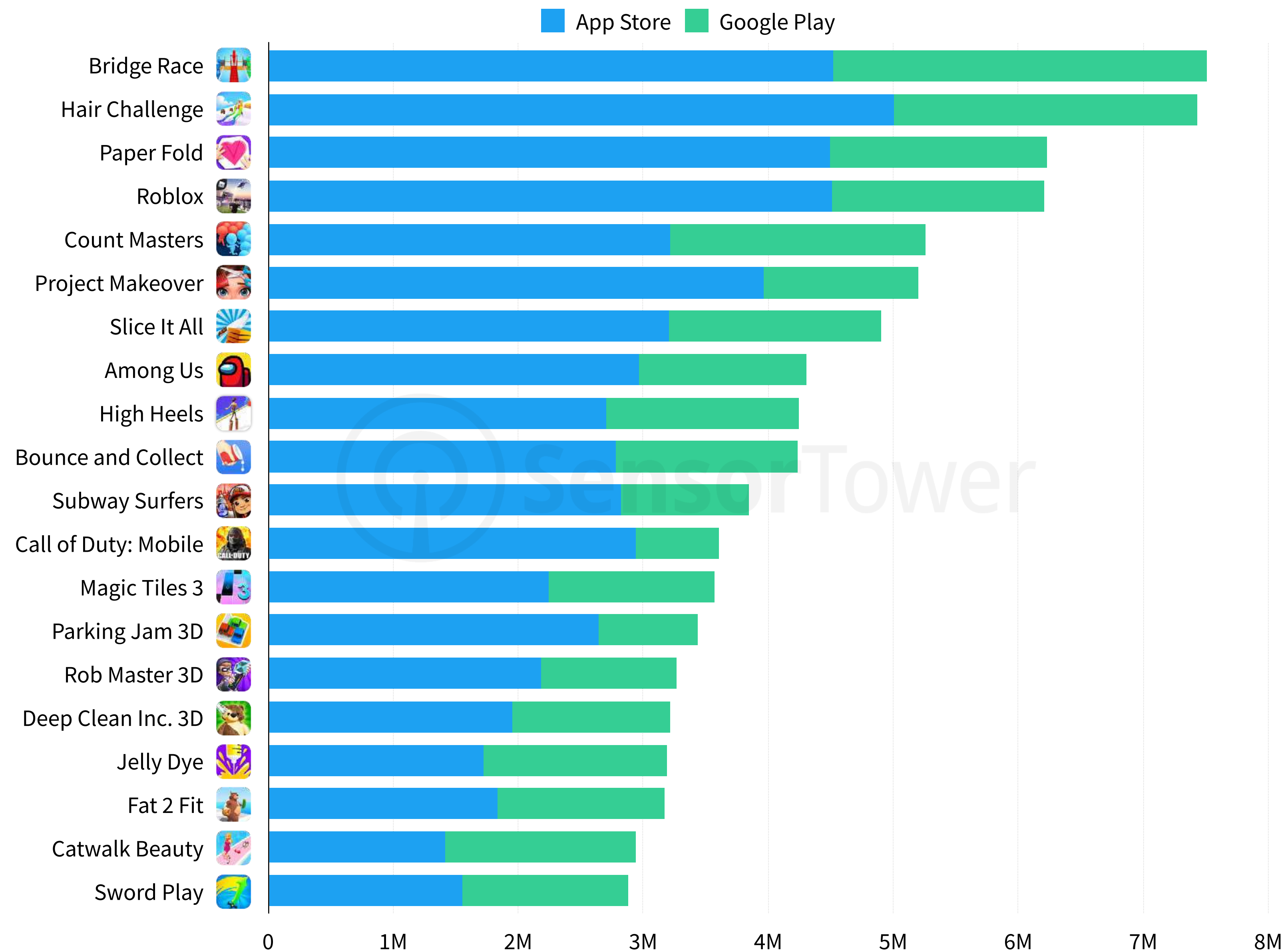
Supersonic Studios had the No. 1 game on Google Play for the second consecutive quarter, with Bridge Race taking the top spot in Q2 2021. Join Clash 3D, No. 16 this quarter, was the top game in Q1 2021.

More than half of the top games were in the Hypercasual genre. The Traversal subgenre of Hypercasual was particularly popular last quarter with seven of the top 20 titles, led by Hair Challenge, High Heels, and Count Masters.

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Overall - United States



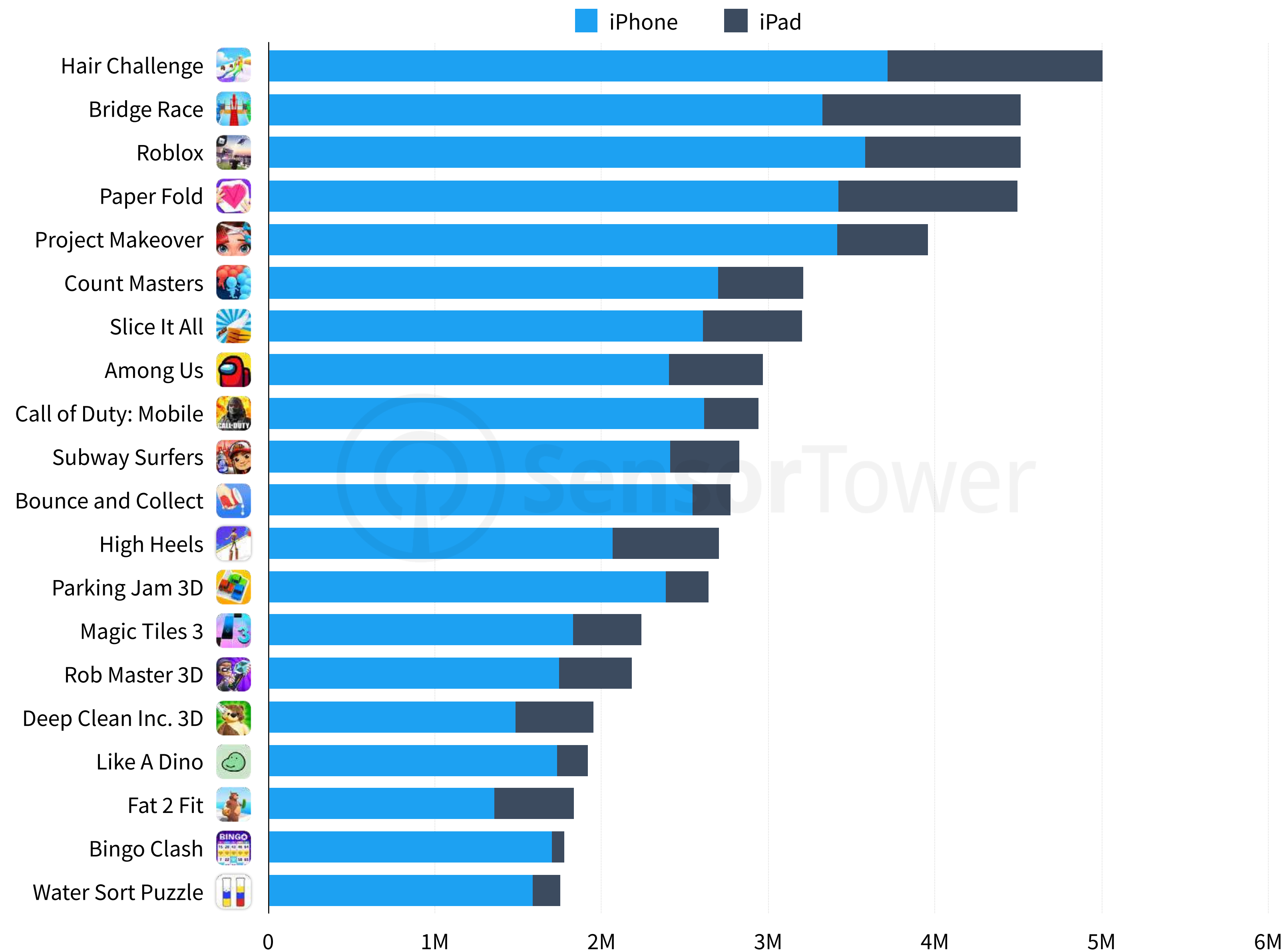
Hypercasual genre games were well represented in the U.S. with 14 of the top 20 games. Four of the top five games in Q2 2021 were in the Hypercasual genre, with Roblox as the lone exception.

Voodoo had three of the top 20 games, including Slice It All and Bounce and Collect among the top 10. Fat 2 Fit, Voodoo's third most-installed title in the quarter, ranked No. 18.

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App Store - United States



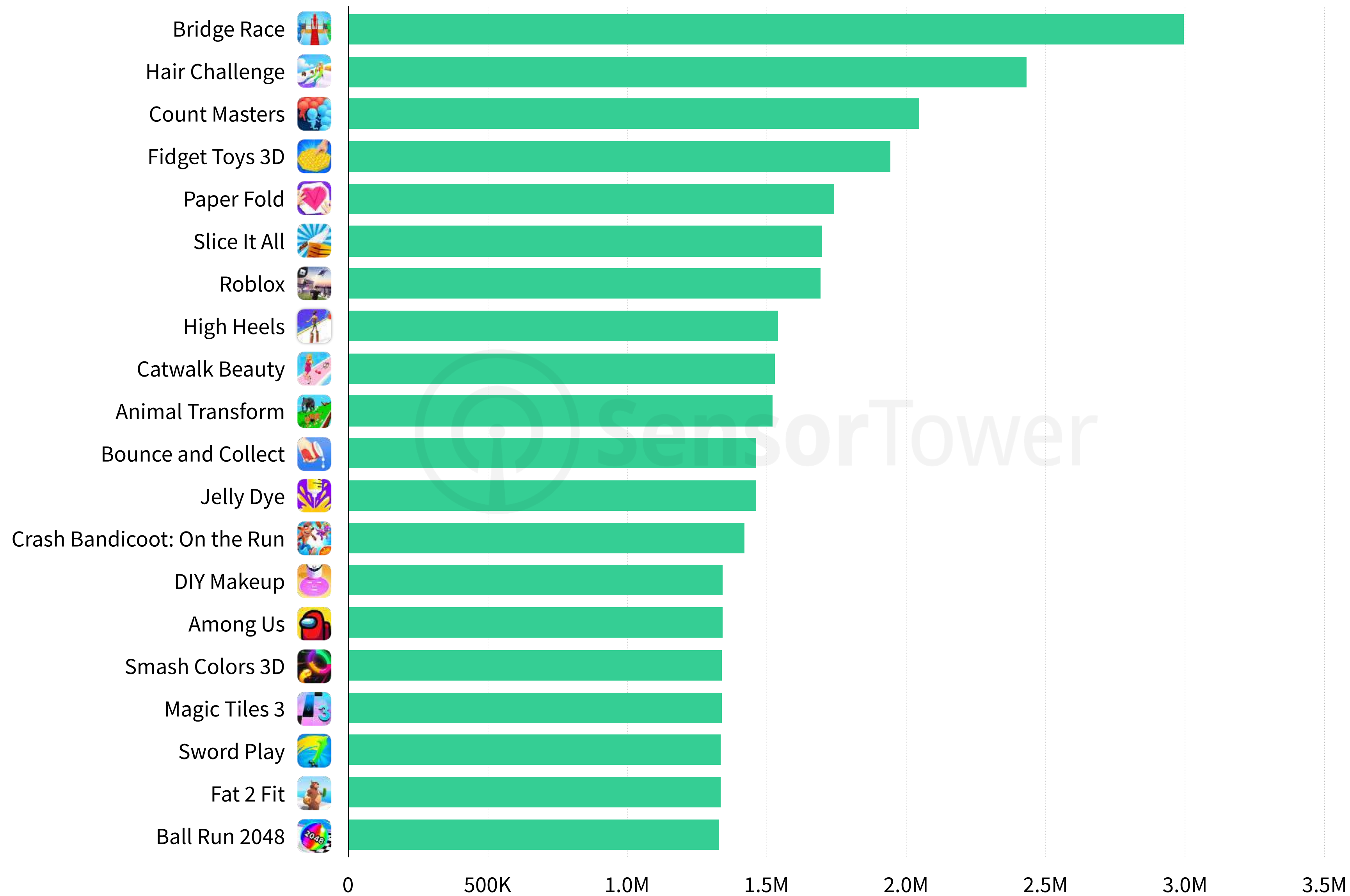
Roblox and Project Makeover have been among the top five games on the U.S. App Store for three consecutive quarters. No game had more U.S. installs in the first half of 2021 than Project Makeover's 11.3 million.

Among Us from InnerSloth remained popular in the U.S., ranking as the No. 8 game with nearly three million App Store downloads. Its U.S. App Store downloads peaked at nearly 18 million in Q4 2020.

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Google Play - United States



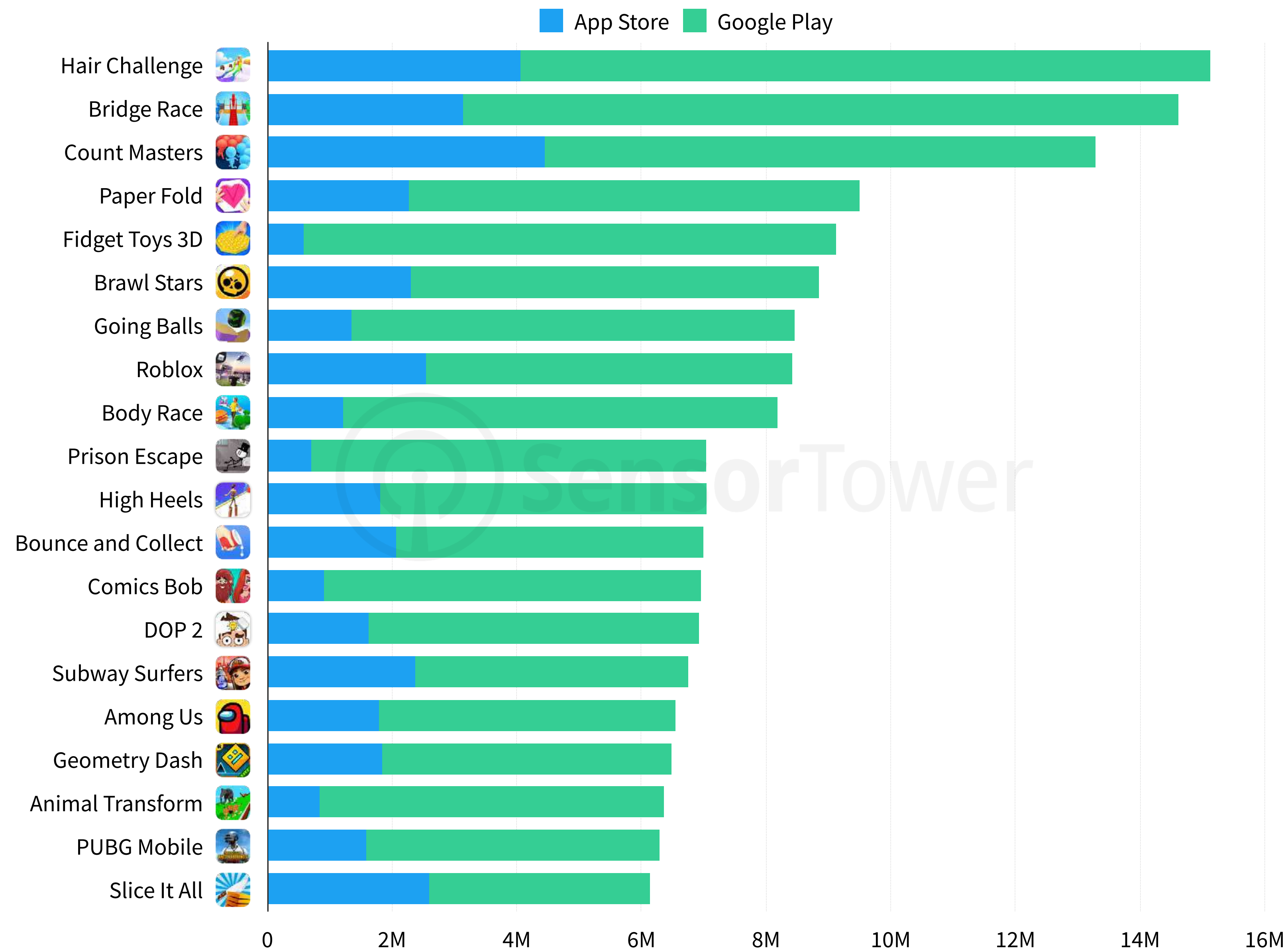
Nine of the top 10 Google Play games in the U.S. were from the Hypercasual genre. Roblox was the only non-Hypercasual game among the top 10.

Crash Bandicoot: On the Run followed up a huge launch in the U.S. in March 2021 and remained in the top 20 for Q2 2021. The King title moved back four positions to rank No. 13.

Note Regarding Download Estimates

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Overall - Europe



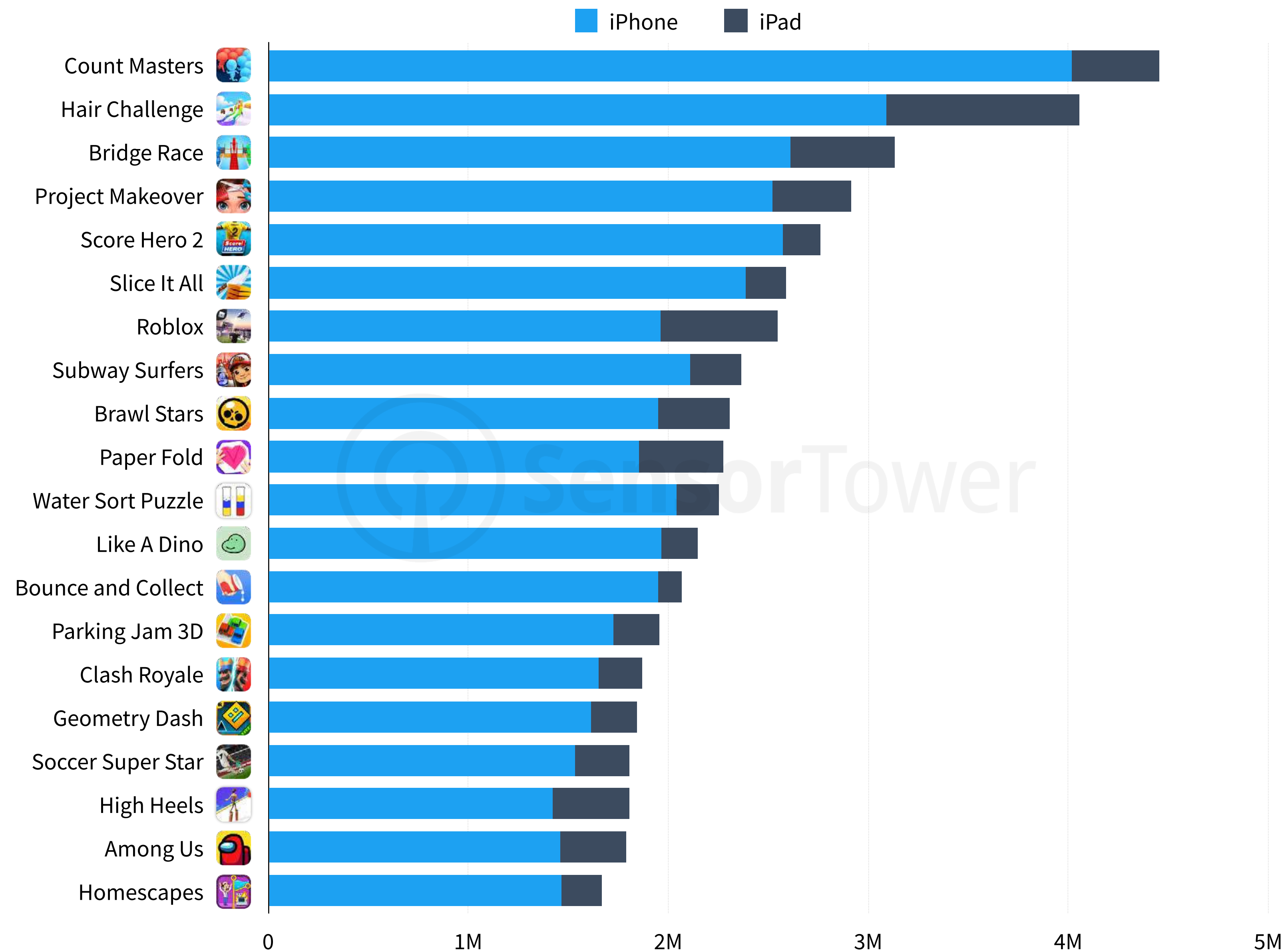
Hair Challenge from Zynga, the No. 2 game globally in Q2 2021, ranked as the top game in **Europe**. Bridge Race from Supersonic Studios and Count Masters from Tap2Play rounded out the top three.

Top non-Hypercasual genre games in the quarter included Brawl Stars, Roblox, and PUBG Mobile. Three Arcade genre games also ranked among the top 20, with Subway Surfers, Among Us, and Geometry Dash.

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App Store - Europe



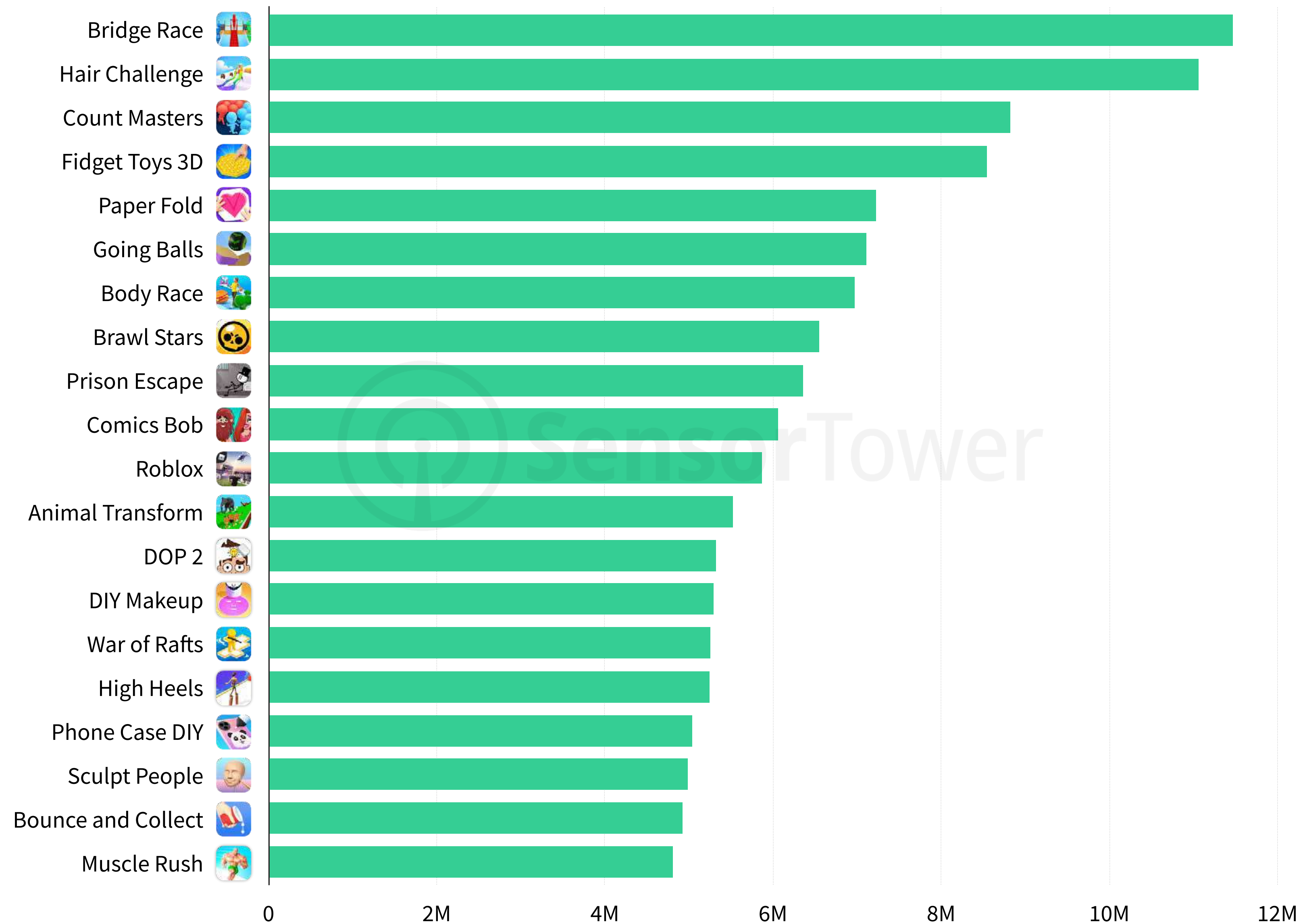
On the App Store, Count Masters was the top game in Europe in Q2 2021. Its success in the region was well-distributed across many countries, led by the U.K. with 13% of installs, France (13%), and Russia (10%).

Project Makeover, a Puzzle & Decorate theme game from Magic Tavern, returned to the top five for the third straight quarter. Its best quarter was Q1 2021 when it had more than 5.5 million App Store installs in Europe.

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Google Play - Europe



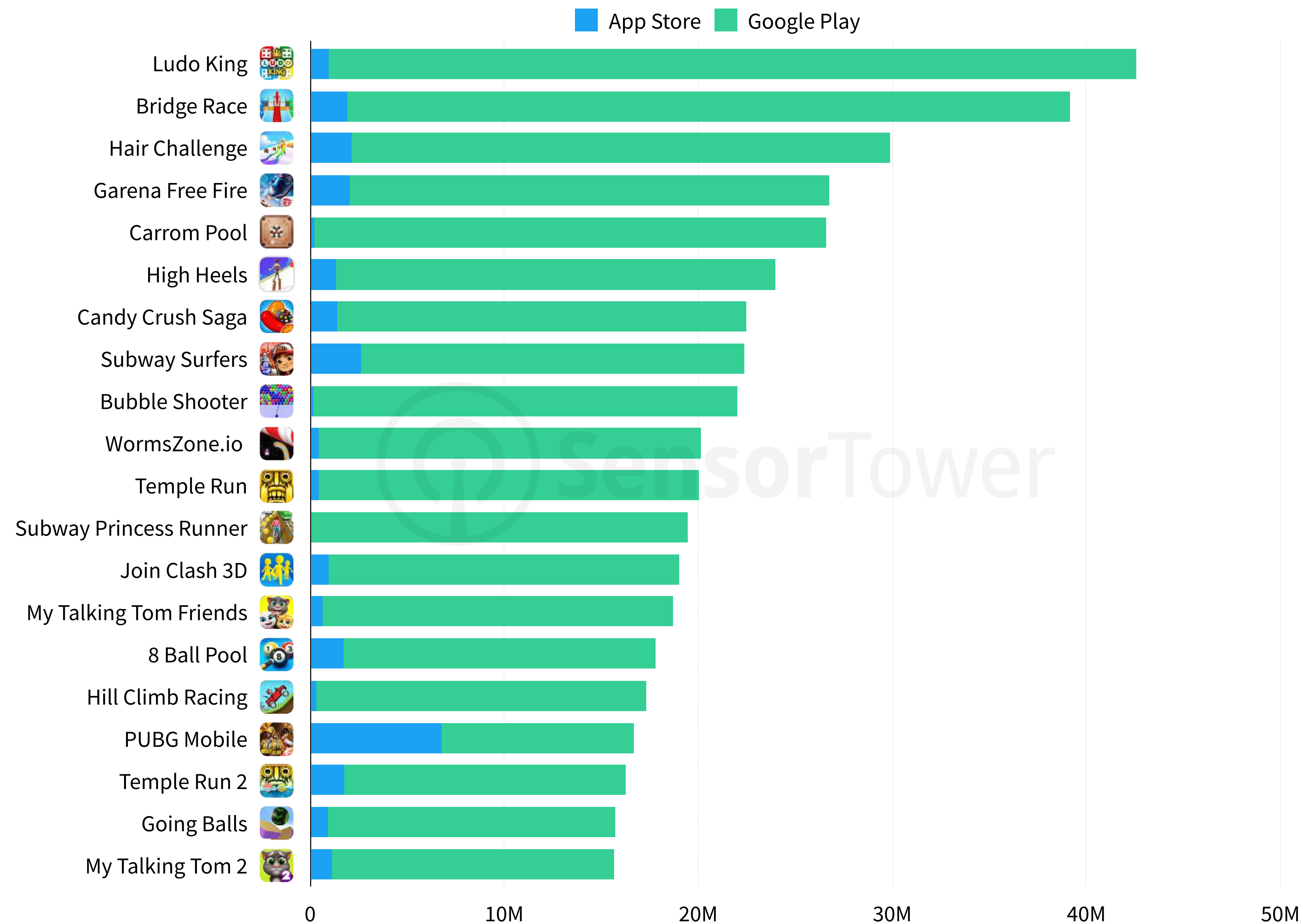
The top three games on Google Play were the same as on the App Store, but with **Bridge Race** and **Count Masters** swapping spots as the **No. 1** and **No. 3** titles in the ranking, respectively. Hair Challenge ranked No. 2 on both platforms.

Supersonic Studios had two of the top 10 games, with **Going Balls** joining the **No. 1** game **Bridge Race**. Another Israel-based publisher, **Crazy Labs**, had three games among the top 20, as did **SayGames**.

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Overall - Asia



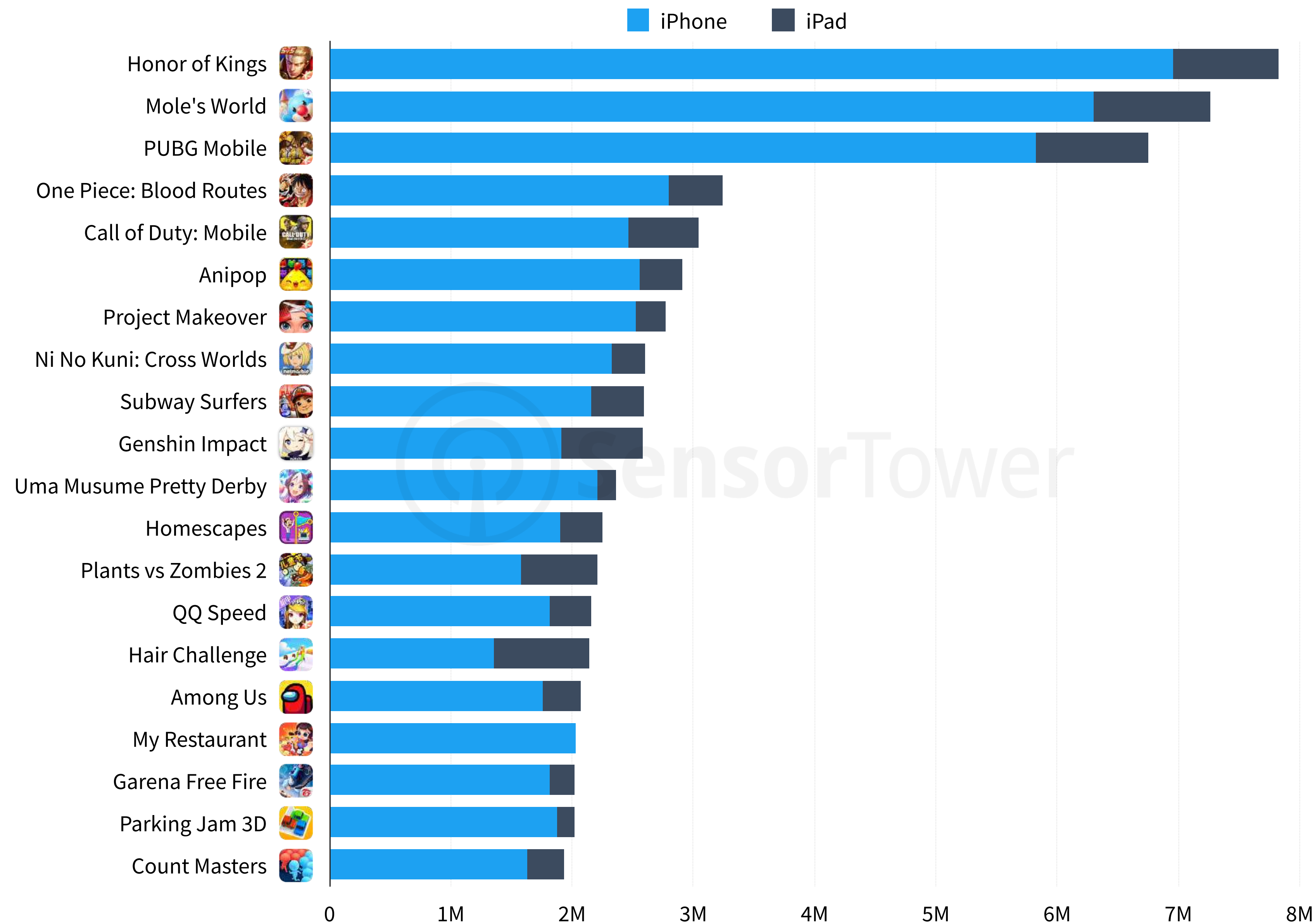
Ludo King was the top game in Asia, driven by its popularity in India. India accounted for nearly 80 percent of Ludo King's global downloads in Q2 2021, followed by Indonesia with 7 percent.

There was less turnover among the top games in Asia compared to the U.S. and Europe. Six of the top 10 games in Q1 2021 returned in 2Q21, including Ludo King, Garena Free Fire, Candy Crush Saga, Subway Surfers, Bubble Shooter, and WormsZone.io.

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App Store - Asia



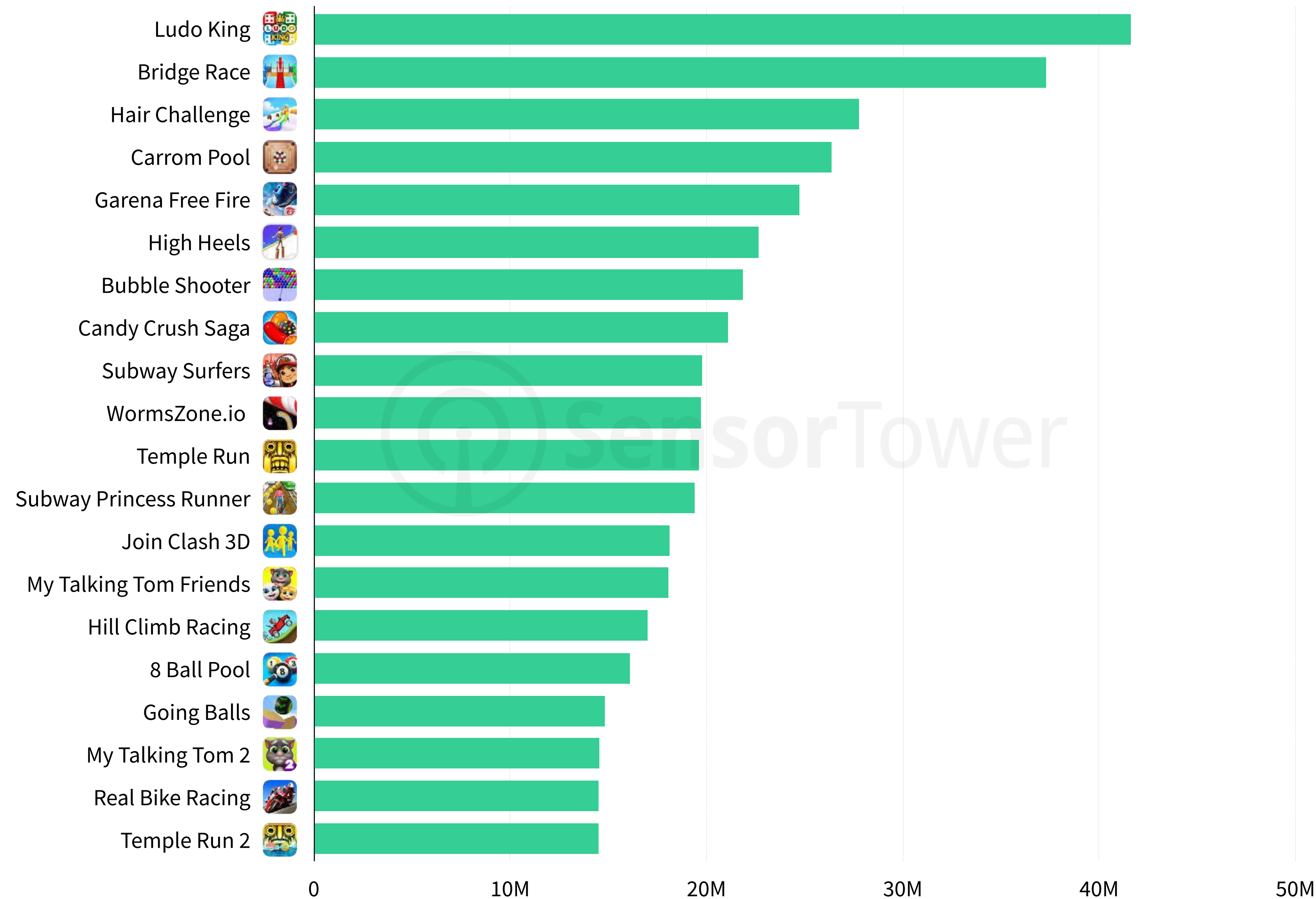
While Honor of Kings was once again the No. 1 app, Mole's World from Leiting competed with some top Tencent titles on the App Store in Asia. All of Mole's World's downloads were from China.

One Piece: Blood Routes from ByteDance was the No. 4 game. It launched in April 2021, and reached 3.2 million App Store installs in the quarter. Like Mole's World, it was also only available in China.

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Google Play - Asia



Ludo King reached more than 40 million downloads on Google Play in Asia, up 50 percent quarter-over-quarter. It was Ludo King's second best quarter in the region to date behind Q2 2020.

Asia had fewer Hypercasual genre games among the top 20 on Google Play than the U.S. and Europe, though most games were still Casual category games. Garena Free Fire and FPS Commando were the only Mid-Core games among the top 20 in Q1 2021.

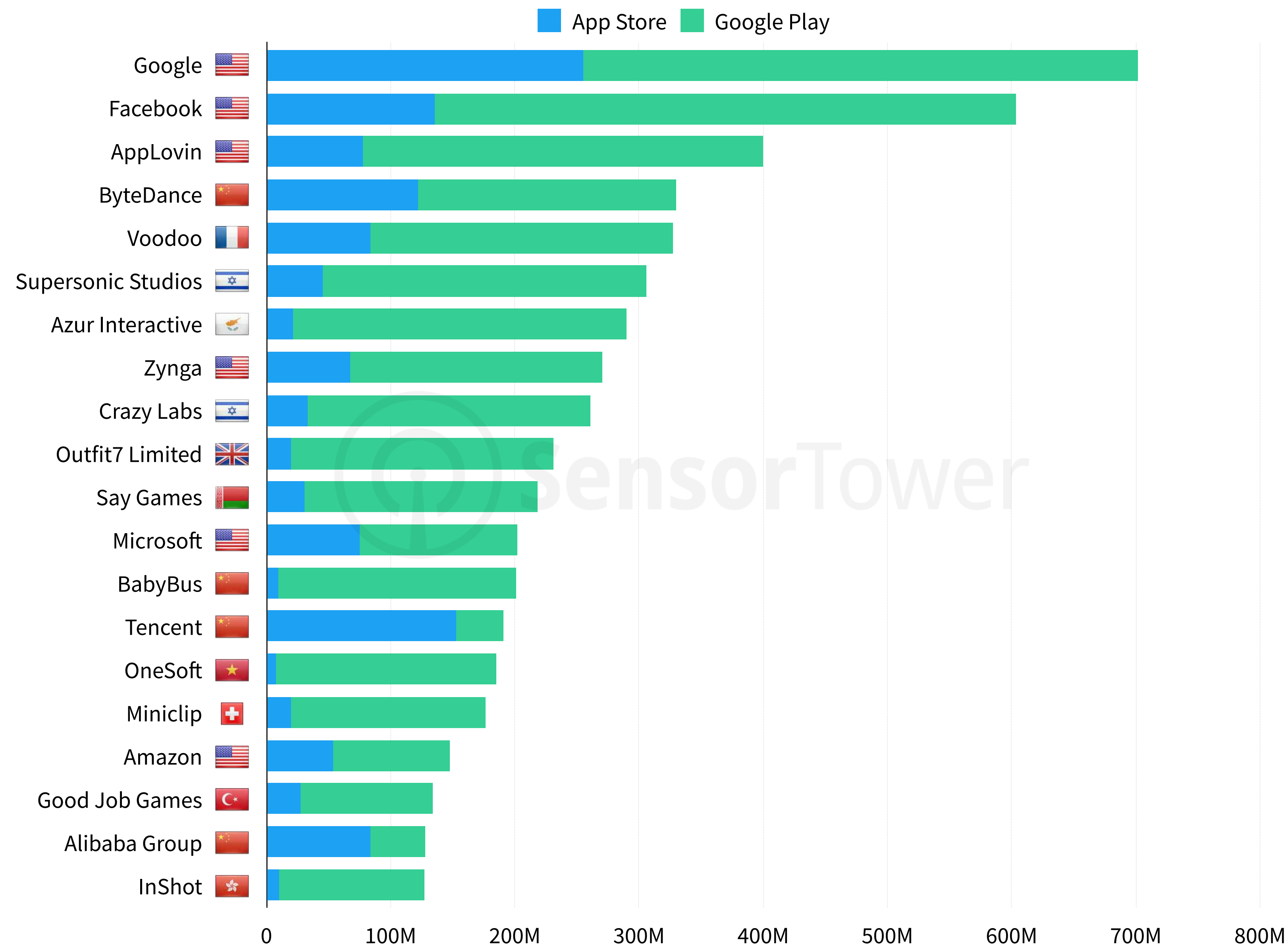
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Top Publishers

Top Publishers by Downloads in Q2 2021

Overall - Worldwide



Google and Facebook were once again the top two publishers worldwide in Q2 2021. Google had more than 700 million installs in the quarter, while Facebook surpassed 600 million installs.

Many Hypercasual genre games publishers ranked among the top 10, including AppLovin, Voodoo, and Supersonic Studios. Zynga was among the top 10 publishers for the first time in Q2 2021, boosted by its entrance into the Hypercasual genre.

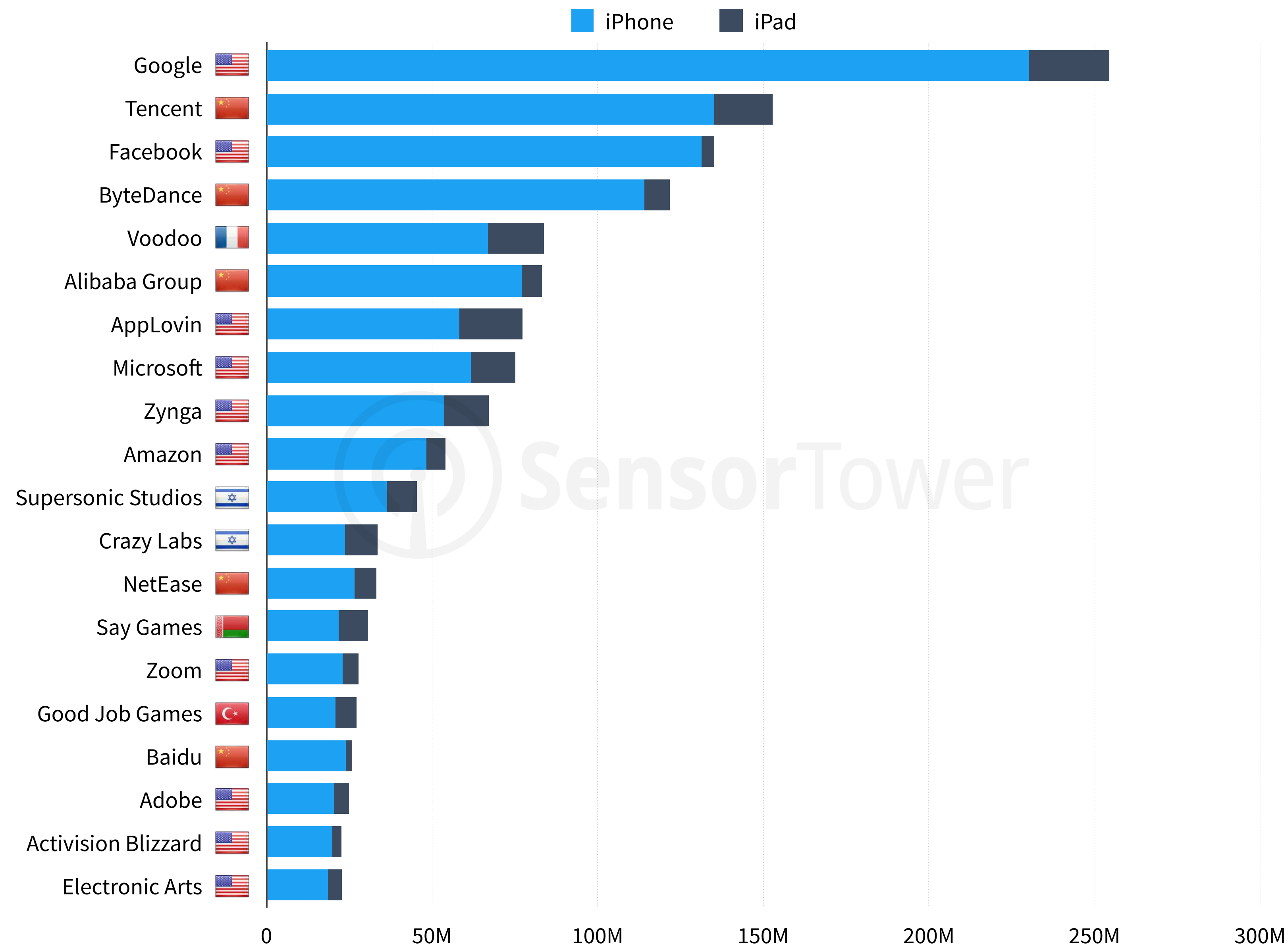
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App Store - Worldwide



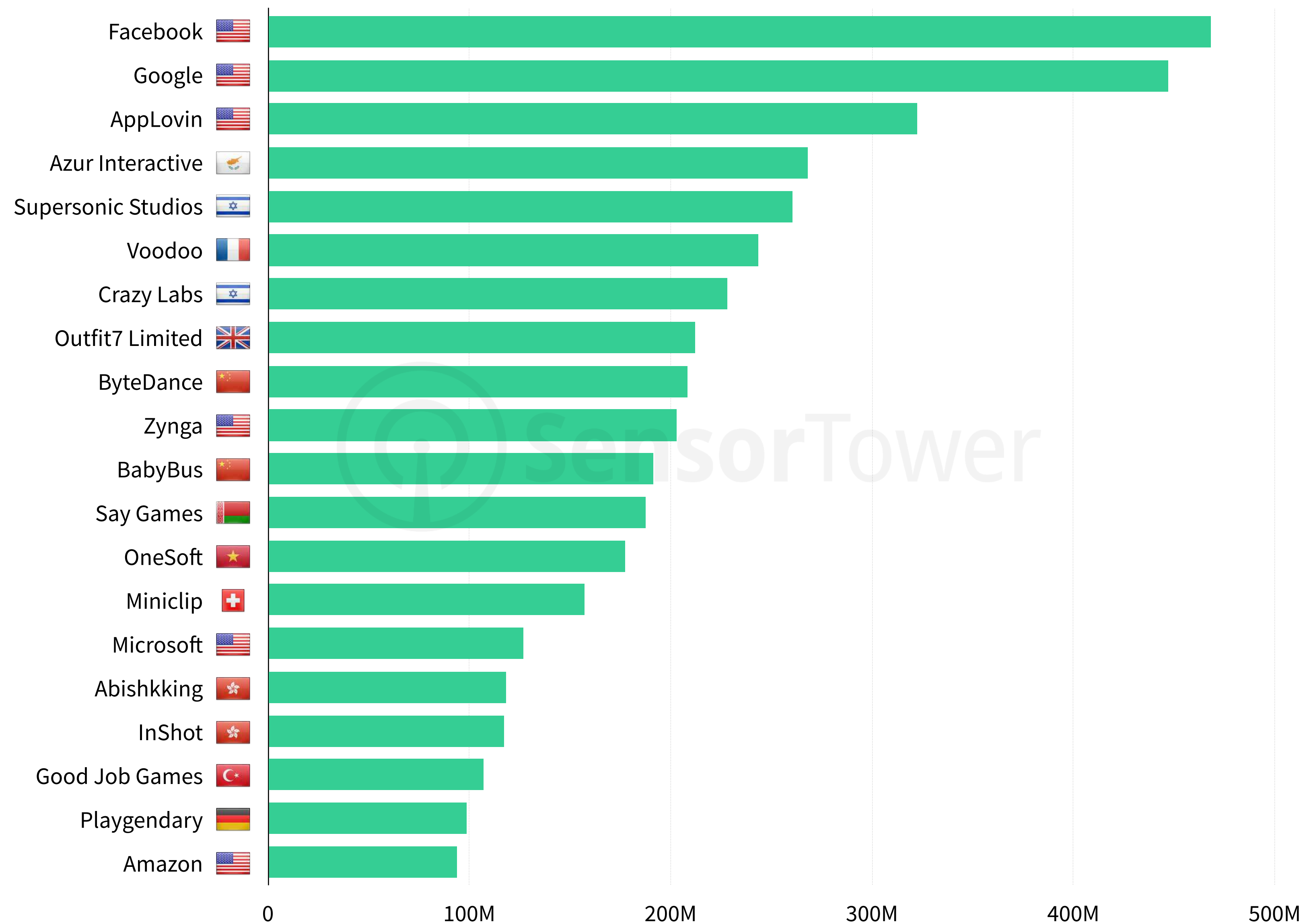
The top 10 publishers were the same as last quarter, with only a few changes in their order. Voodoo passed Alibaba Group and Microsoft to enter the top five.

Two Israel-based games publishers, Supersonic Studios and Crazy Labs, ranked just outside the top 10 at No. 11 and 12, respectively. These publishers also held these same positions in Q1 2021.

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Google Play - Worldwide



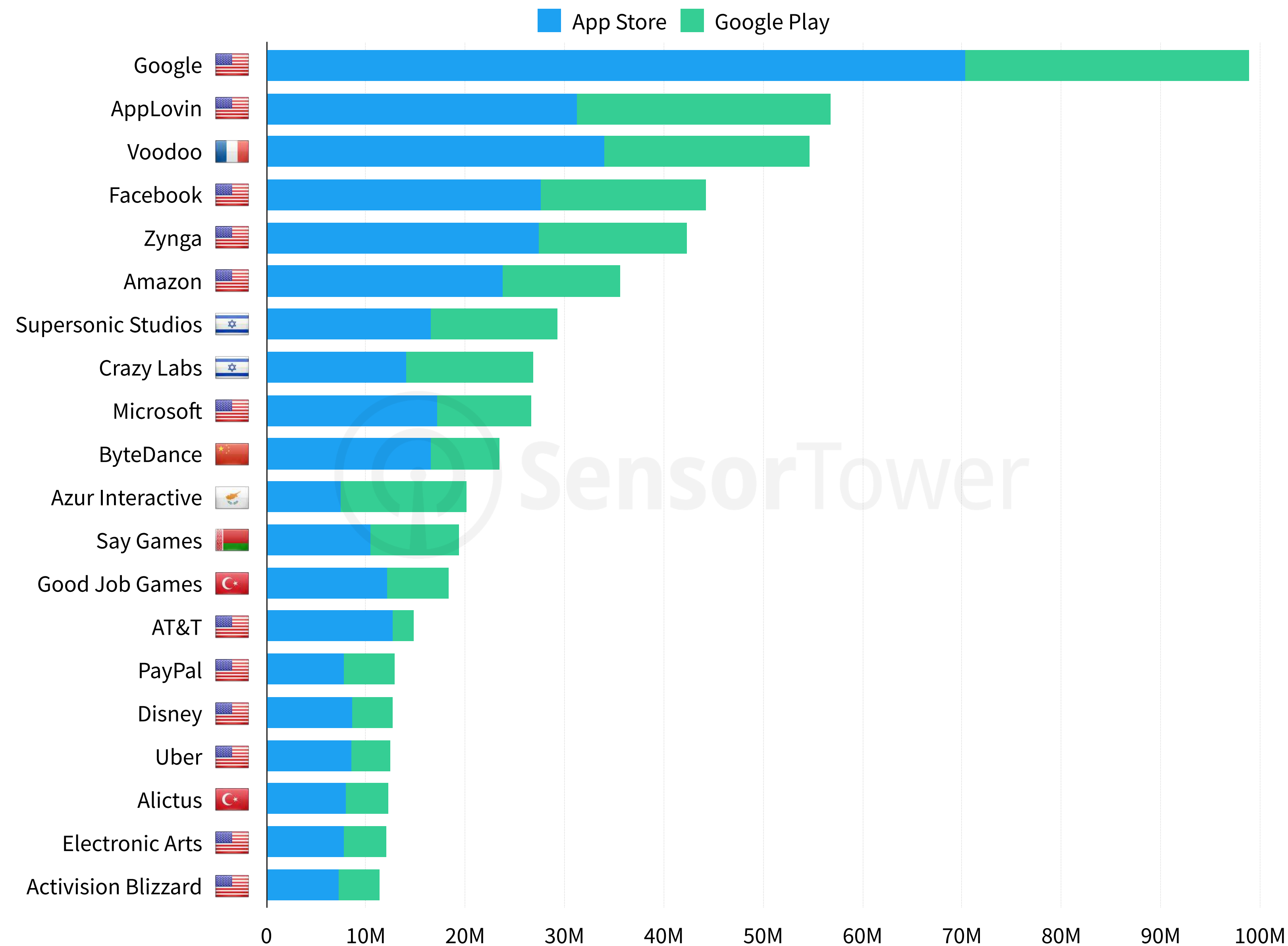
Facebook and Google remained neck-and-neck for the top spot on Google Play. Google reached No. 1 for the first time in Q2 2020 before Facebook regained the top spot in Q1 2021.

Supersonic Studios, publisher of the top game on Google Play in Q2 2021, ranked among the top five publishers for the first time. Its installs have climbed steadily since Q1 2020 from less than 20 million that quarter to more than 260 million in Q2 2021.

Note Regarding Download Estimates

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



The order among the top five publishers was unchanged from Q1 2021. More than half of the top 20 publishers are based in the U.S., including five of the top six.

ByteDance was the only publisher to enter the top 10, achieving this ranking for the first time since Q2 2020. The emergence of CapCut as its clear No. 2 app in the U.S. behind TikTok helped boost the publisher's total this quarter.

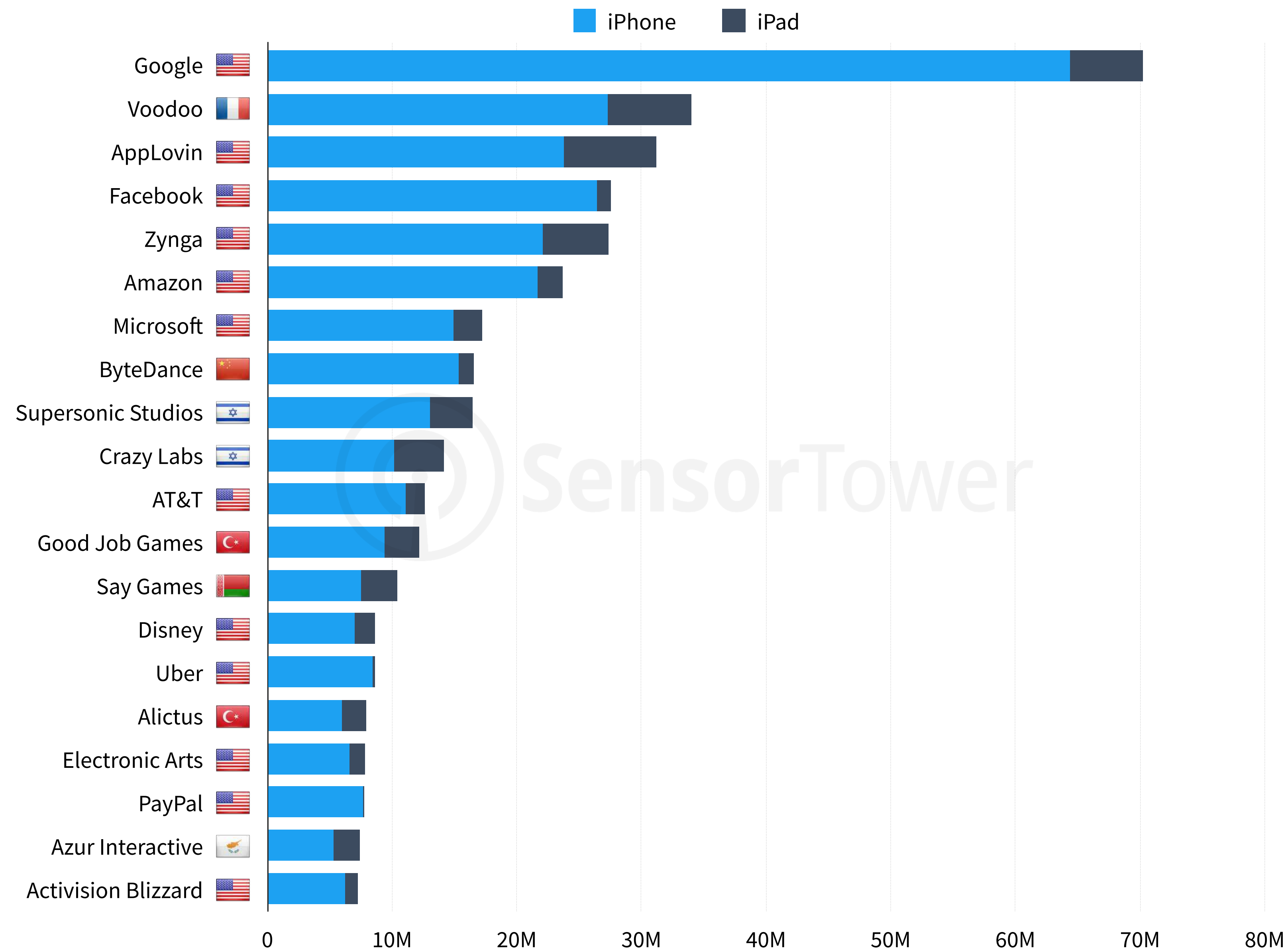
Note Regarding Download Estimates

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



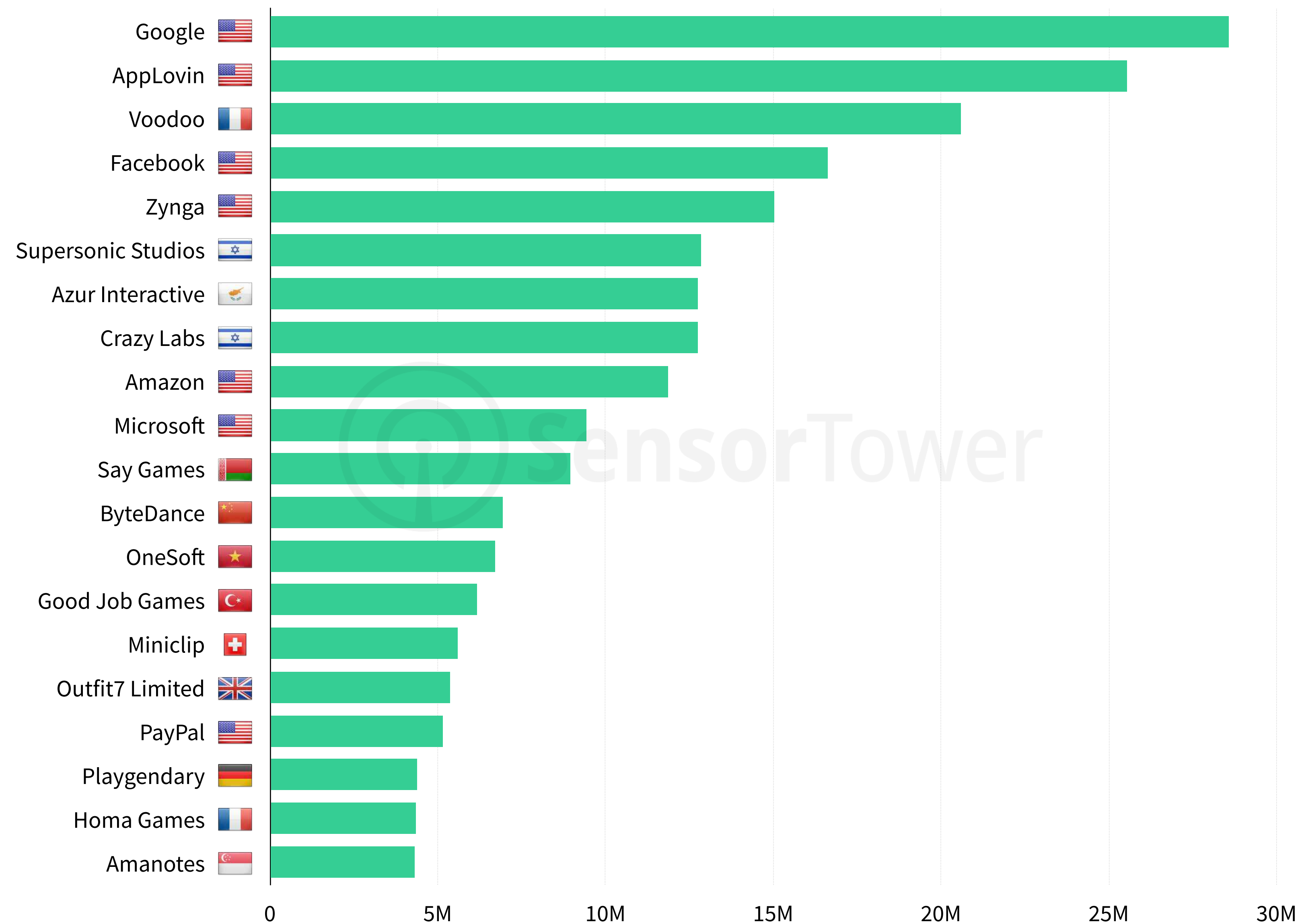
Google's U.S. downloads in Q2 2021 were more than double the No. 2 publisher, Voodoo. 71 percent of its U.S. installs were from the App Store, with 29 percent coming from Google Play.

ByteDance was the only non-games publisher based outside of the U.S. to rank among the top 20. Outside of Hypercasual genre, it has been a challenge for internationally based publishers to compete with U.S. based publishers in the U.S. market.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Apr. 1 through Jun. 30, 2021. Apple apps are excluded. We report unique installs only (one download per User).

Google Play - United States



The top five Google Play publishers were the same as on the App Store (although in a slightly different order). Voodoo, the No. 2 publisher on the App Store, ranked No. 3 on Google Play behind AppLovin.

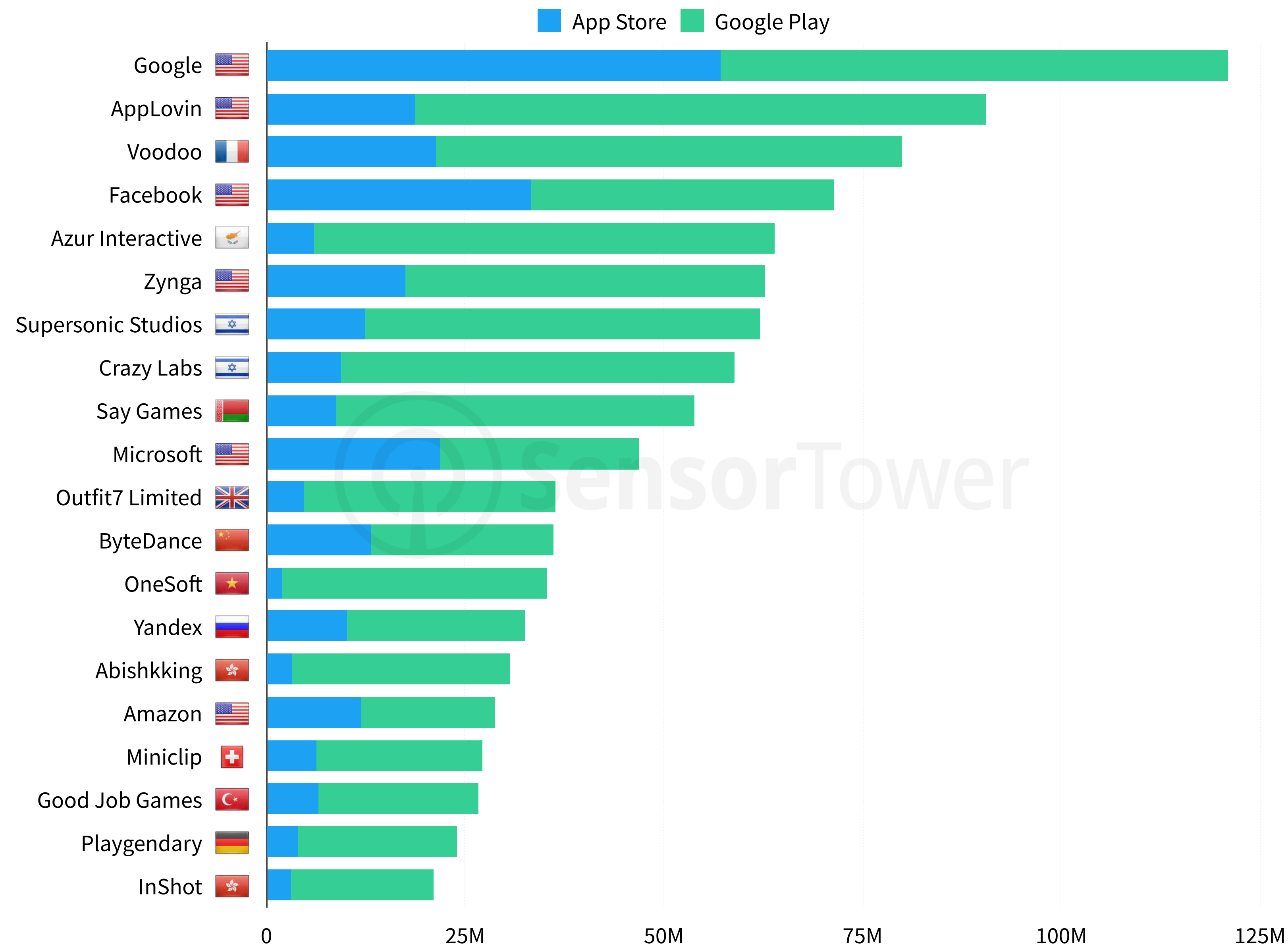
More games publishers ranked among the top 20 on Google Play than on the App Store.

Seventy percent of the top 20 publishers on Google Play focused primarily on games.

Note Regarding Download Estimates

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



Google, AppLovin, and Voodoo have been the top three publishers in Europe for each of the past three quarters. AppLovin was the only one of the three to see positive year-over-year growth in Q2 2021 following the boost seen in 2020 due to COVID-19.

Half of the top 10 publishers in Europe are headquartered in the U.S., led by Google, AppLovin, and Facebook. Voodoo was the top publisher based in Europe, ranking No. 3 overall behind Google and AppLovin.

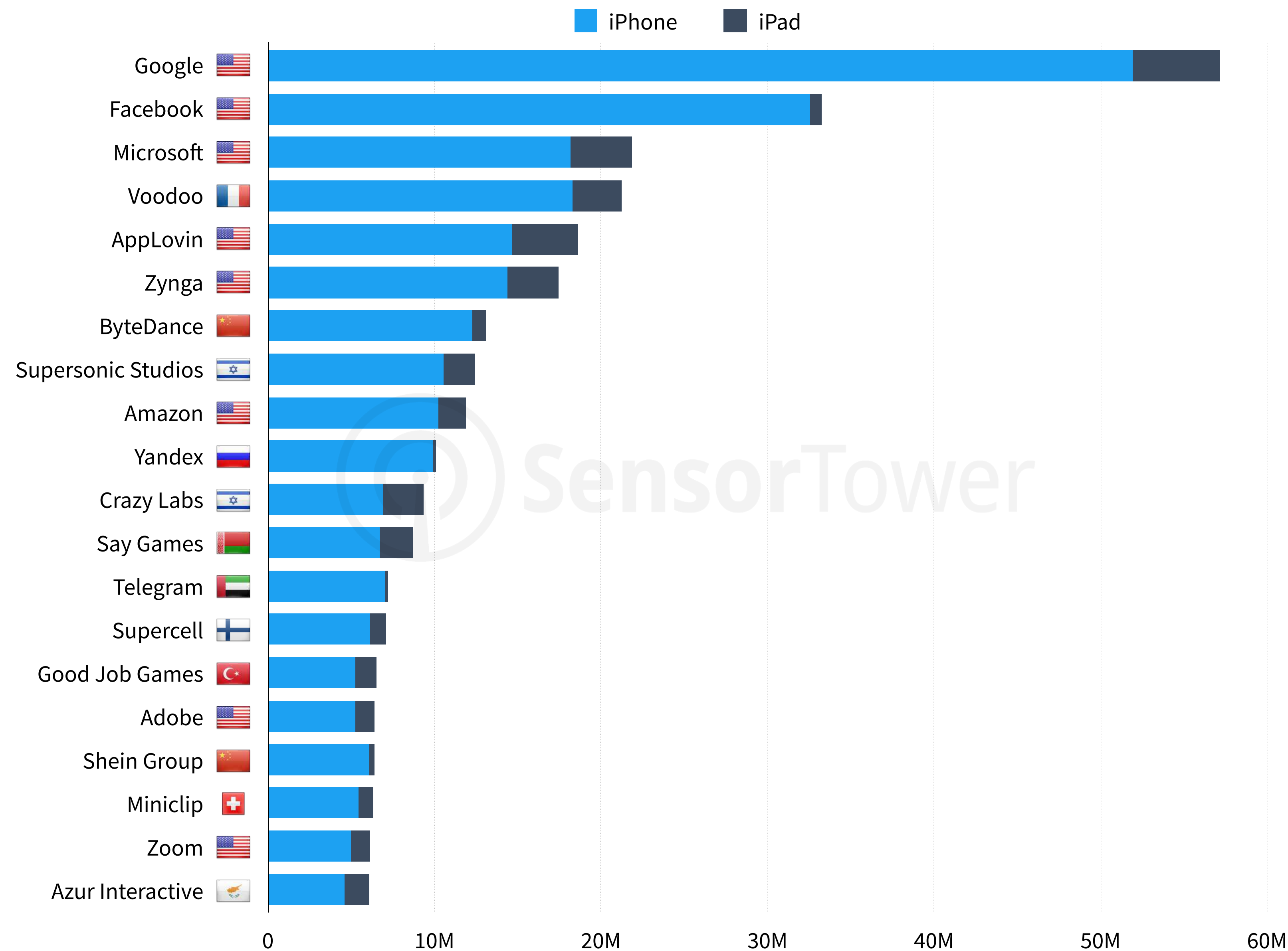
Note Regarding Download Estimates

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



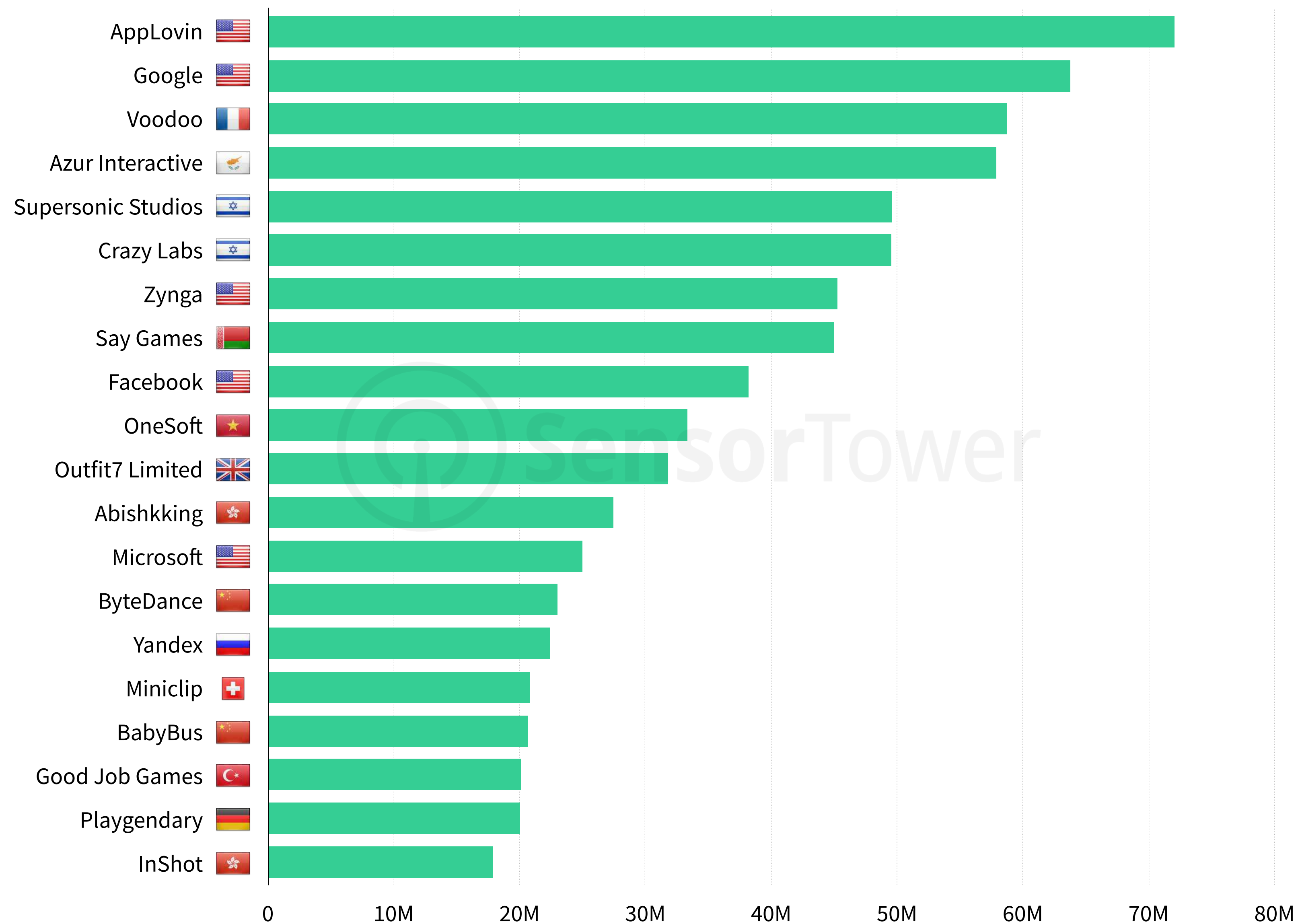
Google was once again the No. 1 publisher on the App Store in Europe with 57 million downloads. This was the eighth consecutive quarter where Google had at least 50 million total app installs.

Yandex was the only publisher to move into the top 10 this quarter. Its installs were up 25 percent from Q2 2020, with its navigation and taxi apps aided by the recovery from COVID-19.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Apr. 1 through Jun. 30, 2021. Apple apps are excluded. We report unique installs only (one download per User).

Google Play - Europe



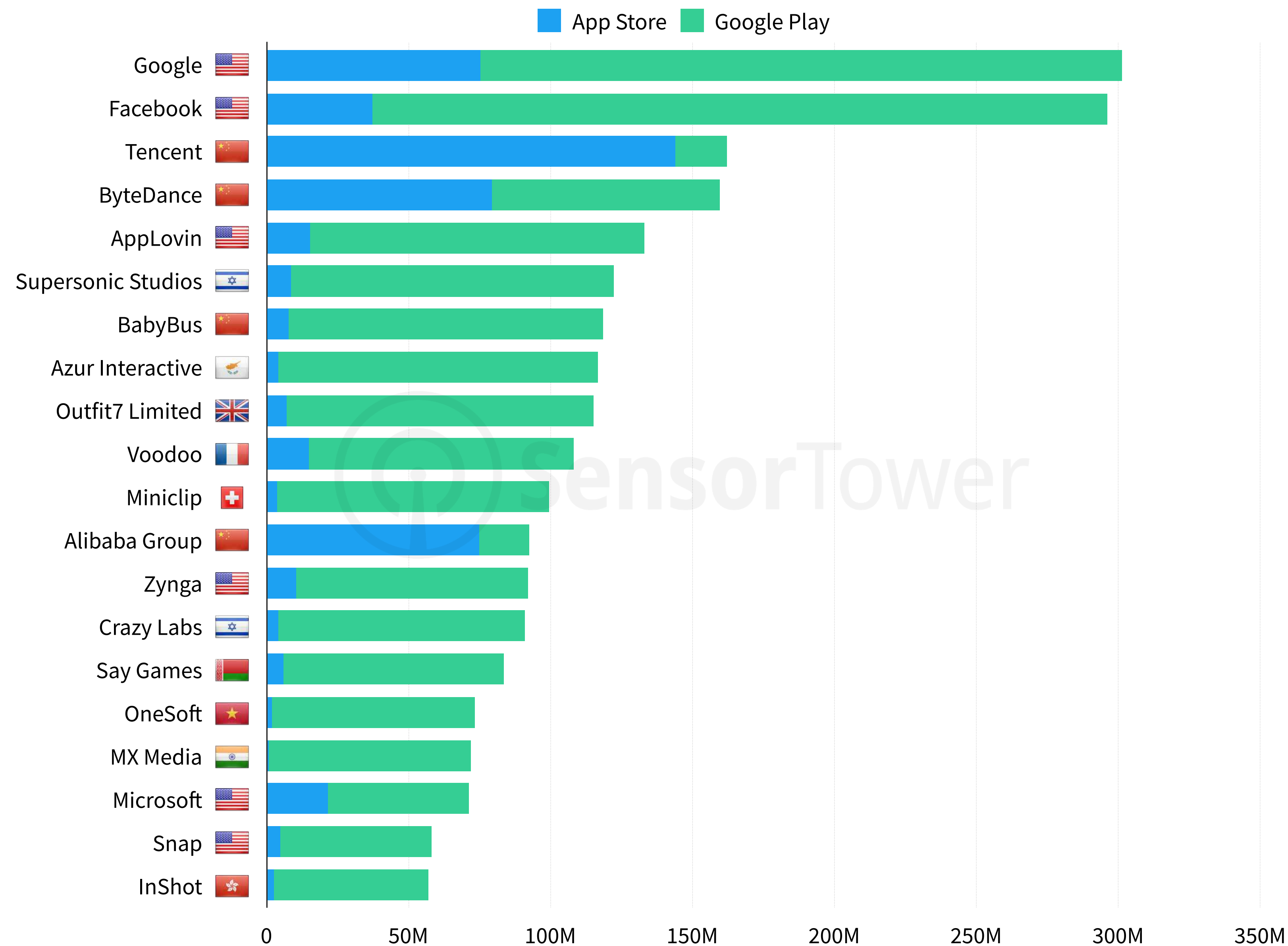
AppLovin edged out Google to take the top spot on Google Play. The bulk of AppLovin's installs were from its game studios including Lion Studios, ZenLife Games, Magic Tavern, Machine Zone, and Belka Games.

Games publishers were dominant on Google Play, taking eight out of the top 10 spots. Google and Facebook were the only non-game publishers among the top 10.

Note Regarding Download Estimates

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



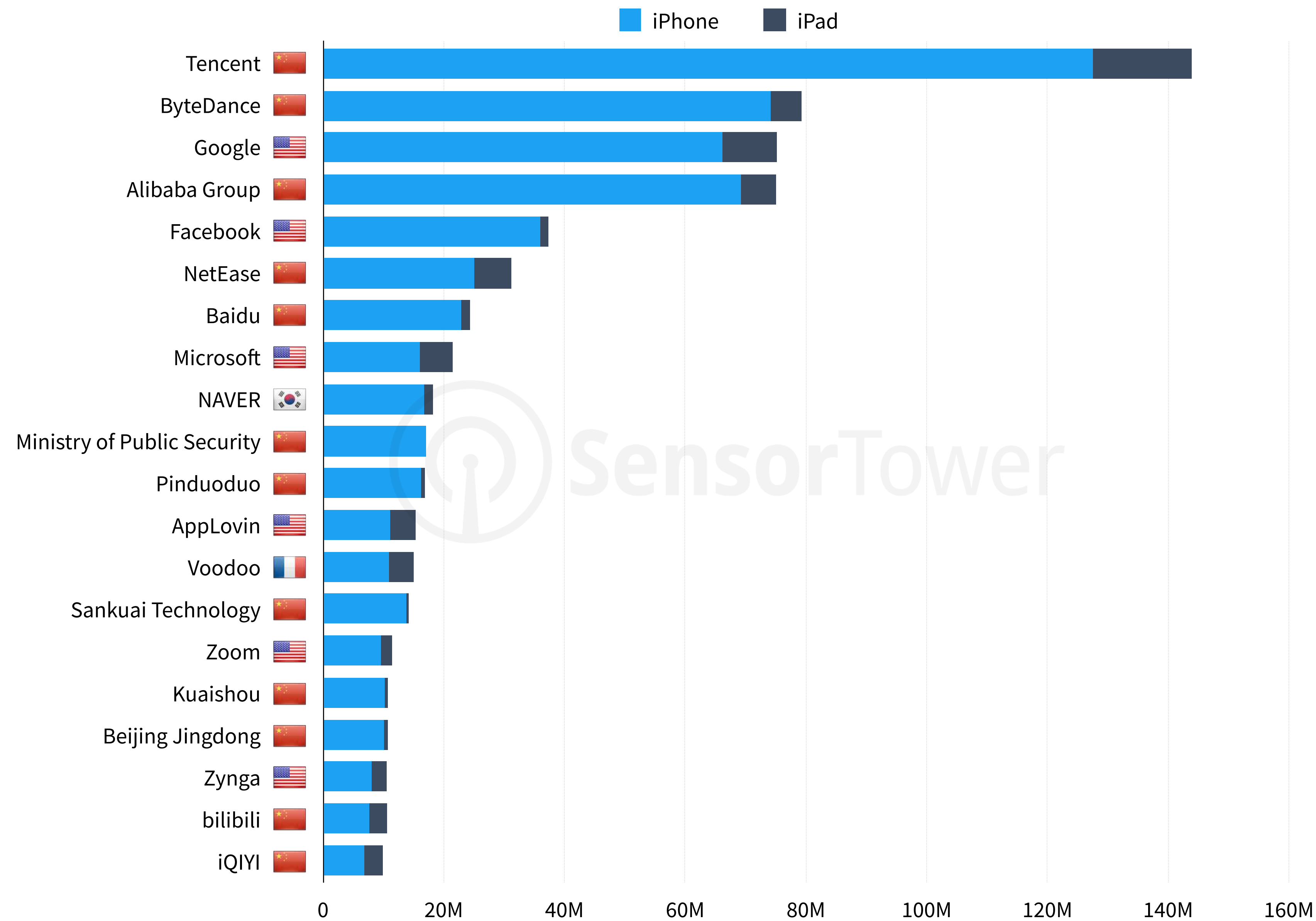
Google's downloads climbed 6 percent quarter-over-quarter in Asia, enough for it to pass Facebook to take the top spot with 301 million downloads. Facebook was right behind it with 296 million downloads.

While most of the top publishers had the majority of their downloads from Google Play, a few Chinese publishers were able to find huge success on the App Store in China. Tencent and ByteDance took the No. 3 and No. 4 spots, respectively.

Note Regarding Download Estimates

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



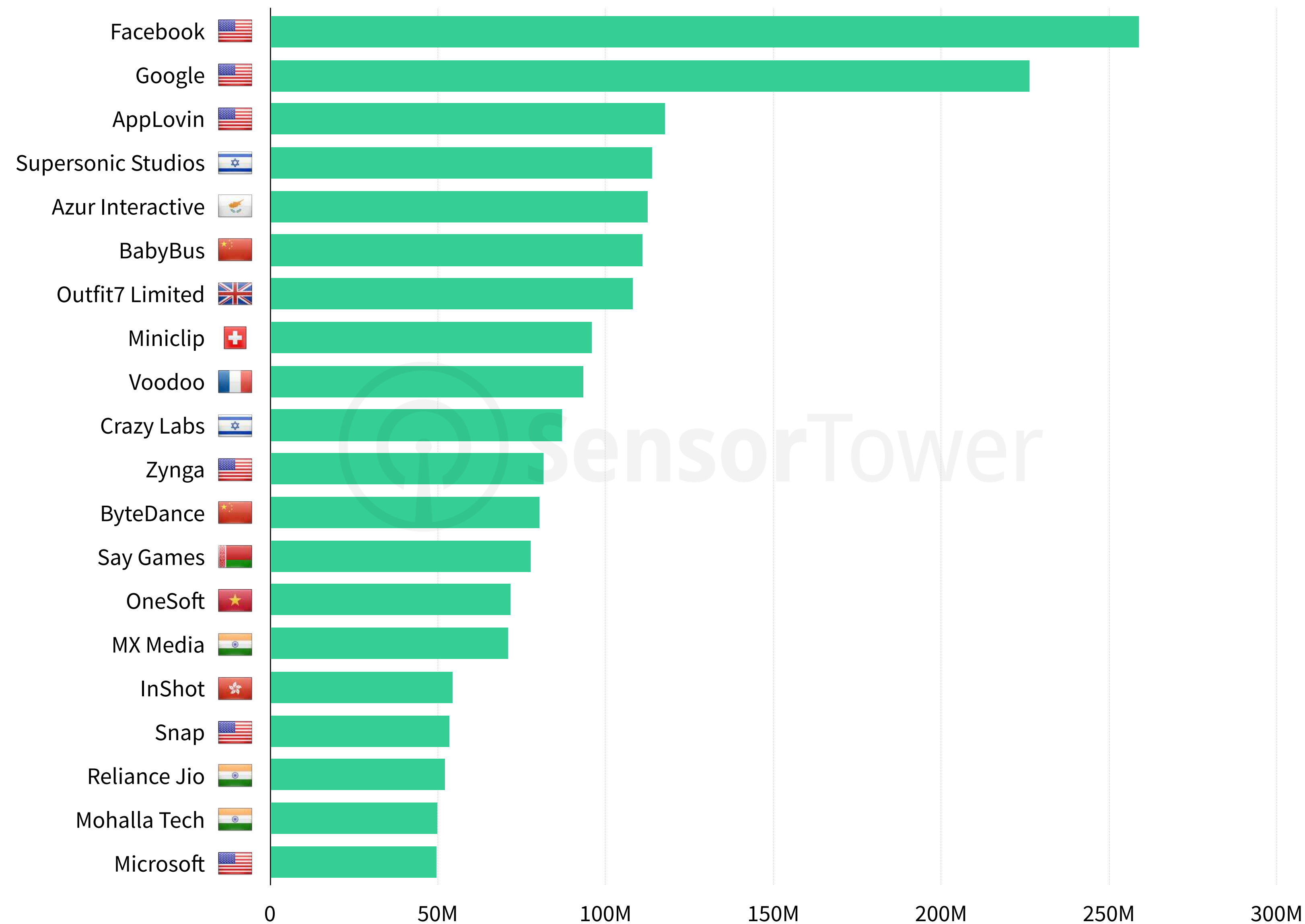
Tencent was the top publisher on the App Store in Asia with more than 140 million downloads. ByteDance ranked second with nearly 80 million installs, followed by Google.

Given that China accounts for more than half of the App Store installs in Asia, it is not surprising that many China-based publishers ranked among the top 20 in Q2 2021. Twelve of the top 20 publishers are from China, including three of the top five.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Apr. 1 through Jun. 30, 2021. Apple apps are excluded. We report unique installs only (one download per User).

Google Play - Asia



While Facebook was the top publisher in Asia for the second straight quarter, Google narrowed the gap in Q2 2021. Google has only had more installs than Facebook in a quarter twice since the start of 2014 (in Q2 and Q3 2020).

Publishers among the top 20 are from 11 different countries. The U.S. had the most publishers at six, followed by India with three and Israel and China with two apiece.

Note Regarding Download Estimates

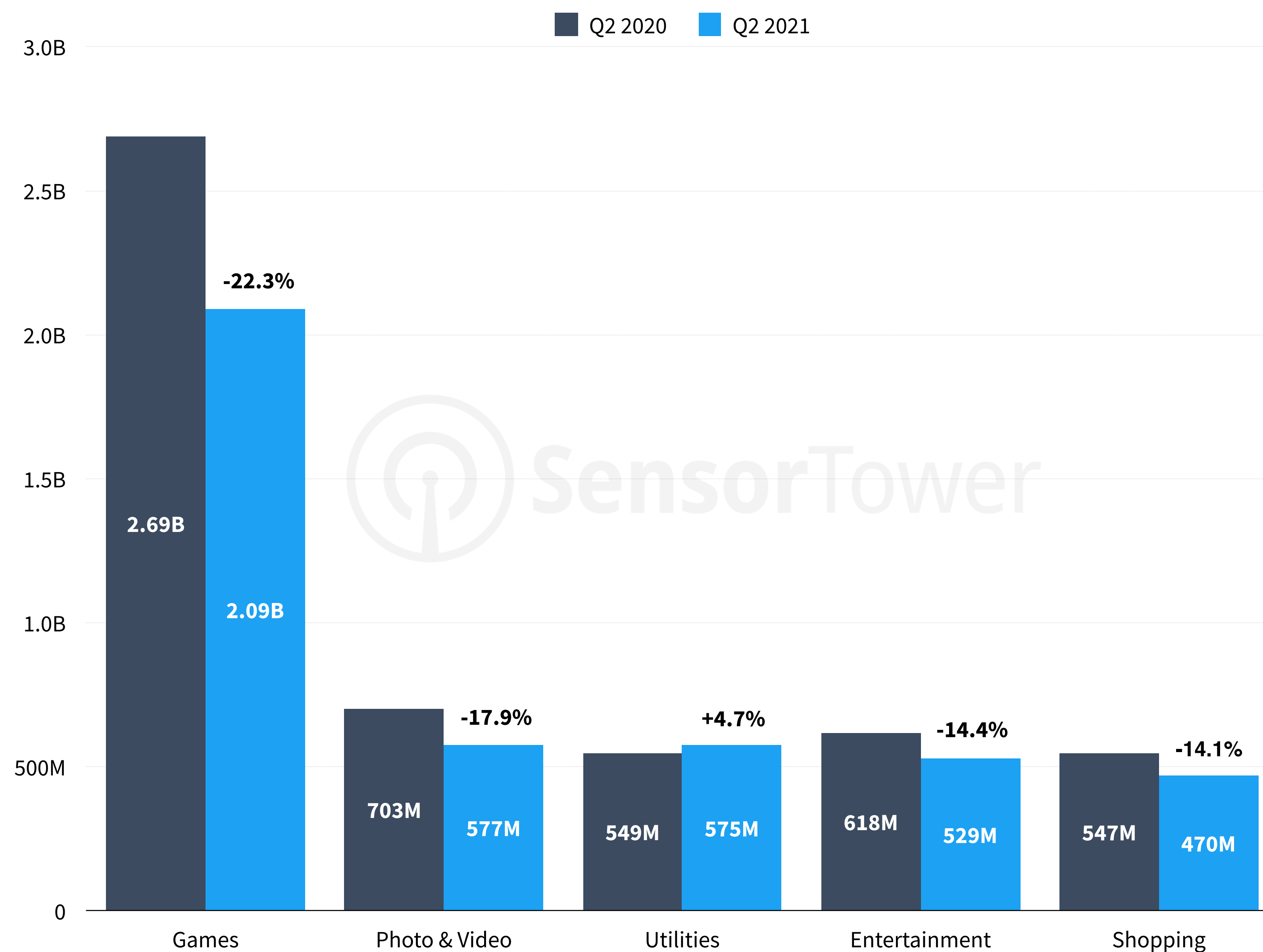
Our estimates include worldwide daily download totals for Google Play for Apr. 1 through Jun. 30, 2021. We report unique installs only (one download per User). Google preinstalled apps are excluded. Android download estimates do not include third-party stores.



Top Categories

Top Categories by Downloads in Q2 2021

App Store



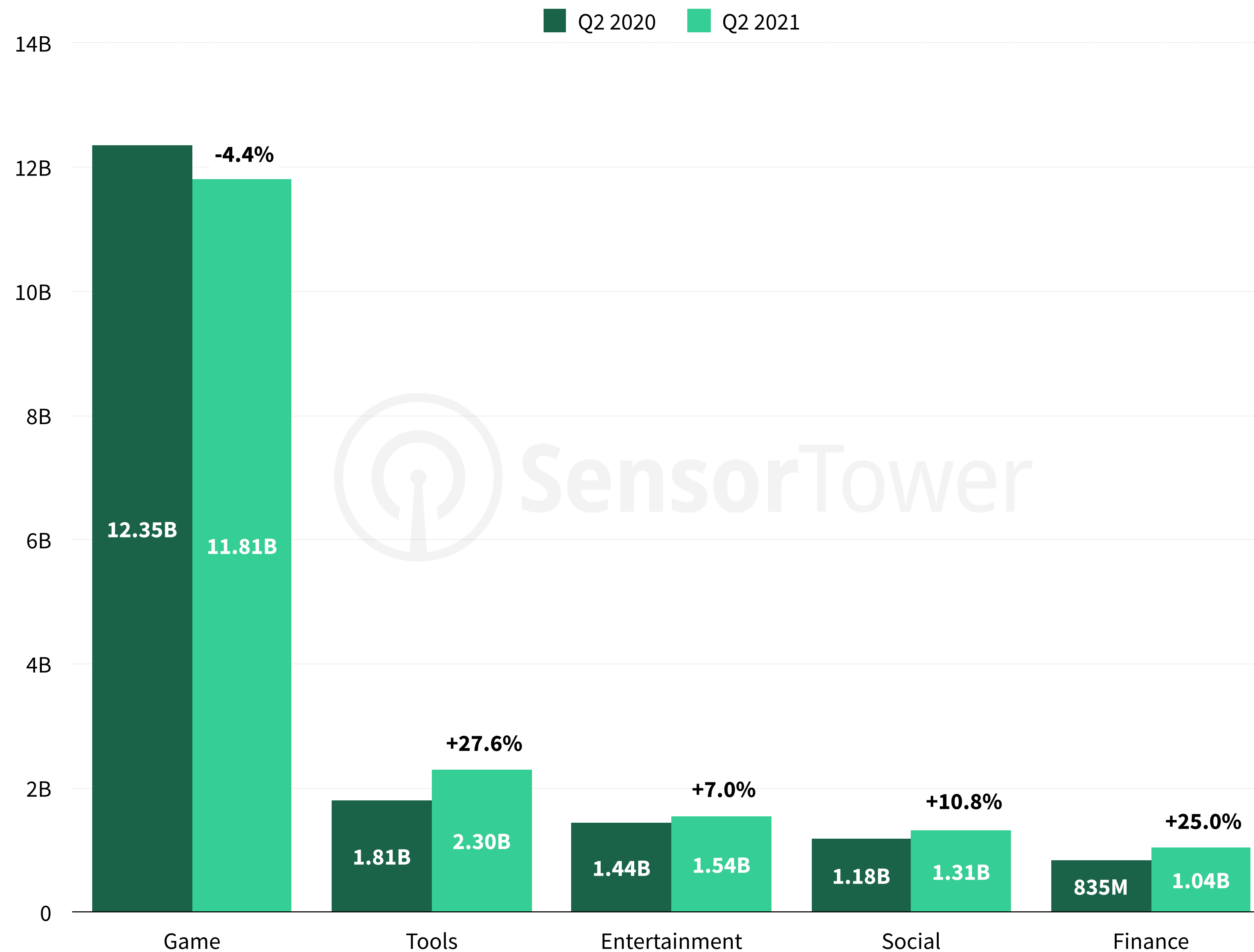
While many top categories saw year-over-year declines in installs, much of this was explained by outsized performance in Q2 2020 at the start of the pandemic. Utilities was the only category among the top five with positive growth Y/Y.

Games was the only top category not to see positive growth over 2Q19, with installs down 7 percent since that quarter and 22.3 percent Y/Y. The slowdown for games was largely driven by China.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Apr. 1 through Jun. 30, 2021. Apple apps are excluded. We report unique installs only (one download per User).

Google Play



Google Play installs have stayed close to the level achieved after a huge baseline increase in Q2 2020. Game installs only declined slightly year-over-year, while the rest of the top five categories saw positive Y/Y growth.

Top growing categories included Tools (27.6 percent Y/Y) and Finance (25 percent). Finance was just the eighth largest category in Q2 2020 behind Communication, Video Players & Editors, and Photography.

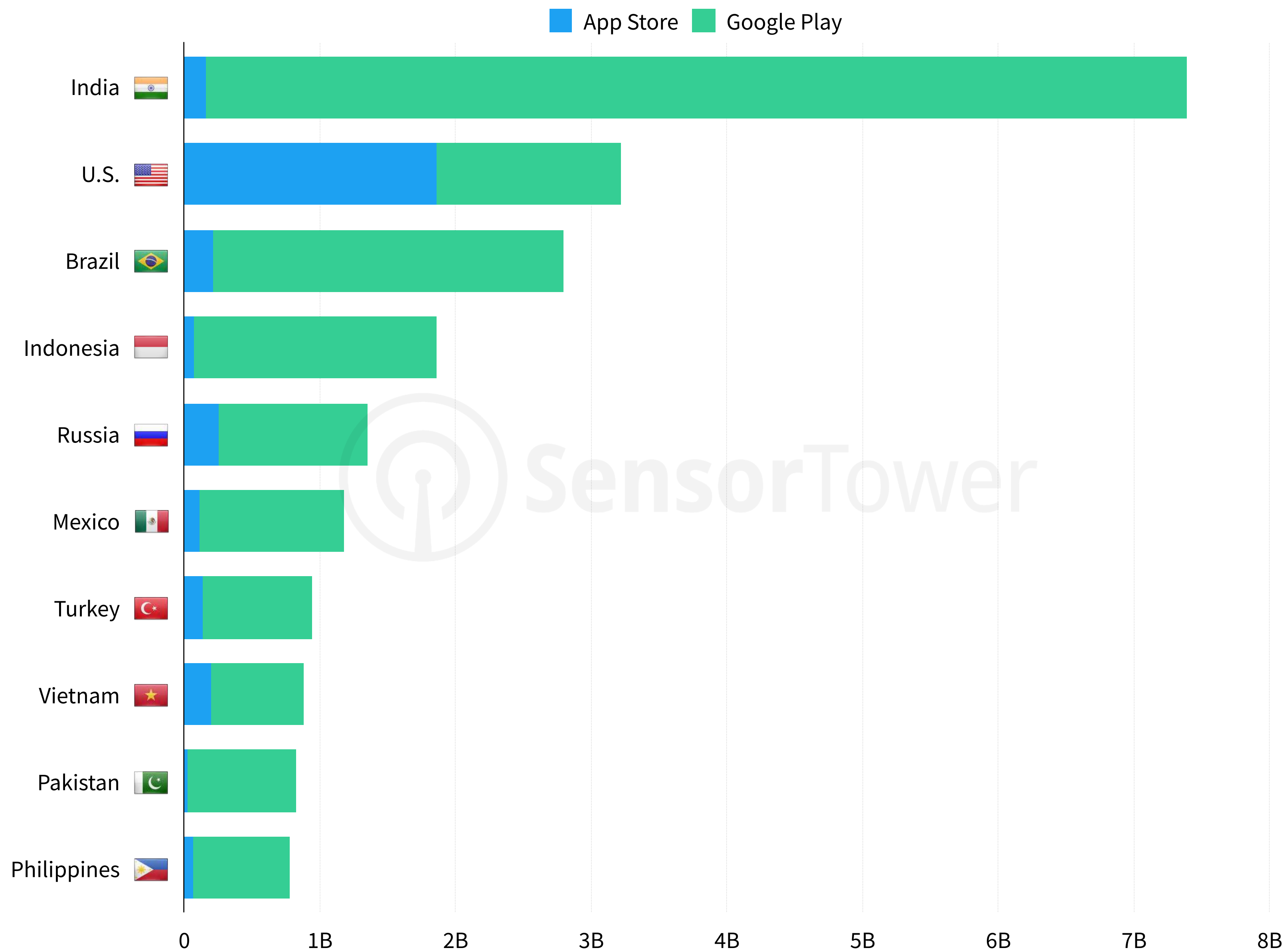
Note Regarding Download Estimates

Our estimates include worldwide daily download totals for Google Play for Apr. 1 through Jun. 30, 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 Q2 2021

Overall



India continued to be the largest market by combined App Store and Google Play installs, surpassing 7 billion downloads in a quarter for the third time. After two quarters with quarter-over-quarter decreases, India's downloads bounced back in Q2 2021 with a 9 percent Q/Q increase.

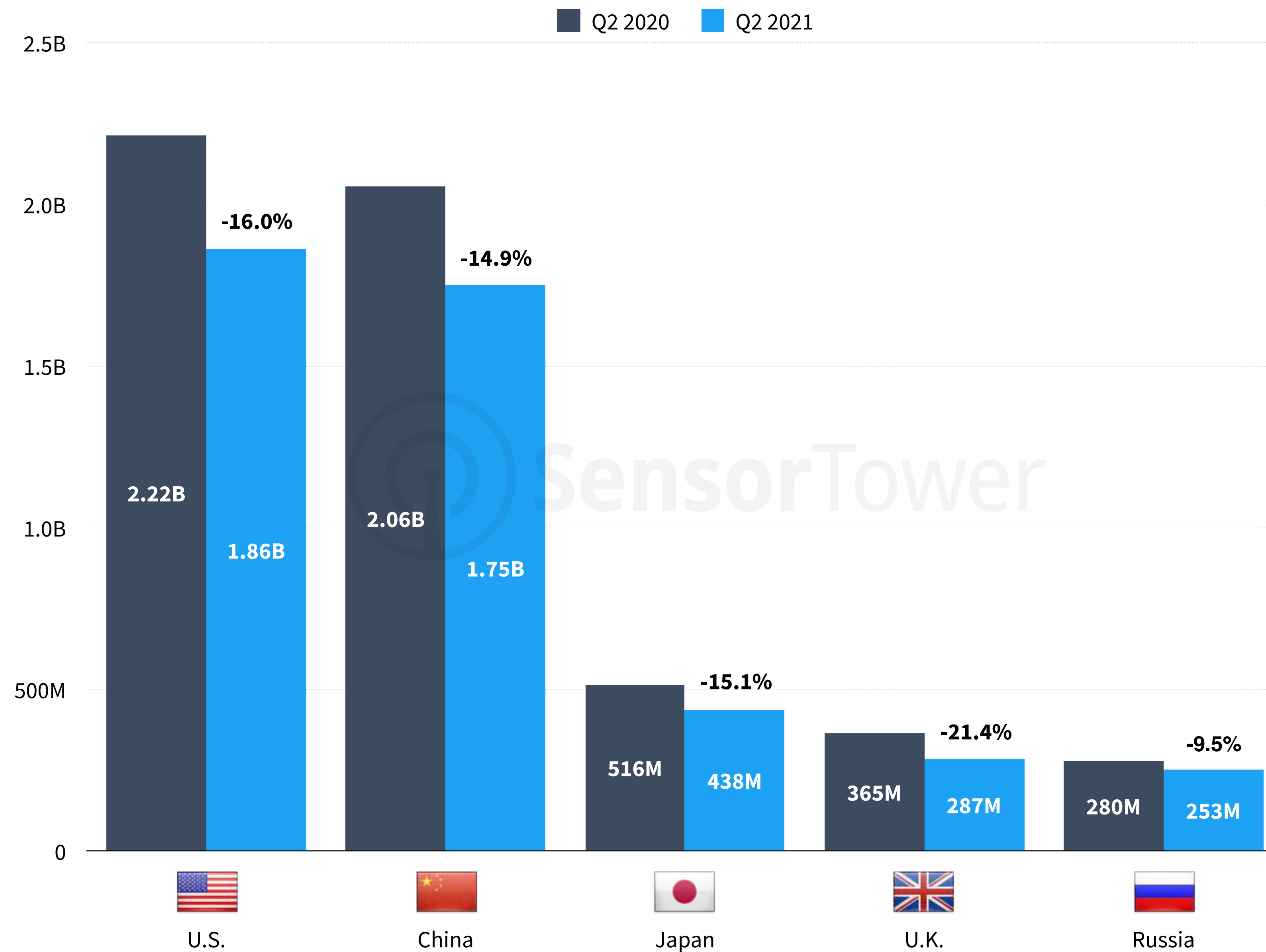
The top seven countries were the same as in Q1 2021. The No. 8-10 countries reshuffled, with Vietnam moving up one spot to No. 8 and Pakistan up three to No. 9.

Note Regarding Download Estimates

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



Q2 Countries by Downloads

Each of the top five iOS markets saw downloads decline year-over-year in Q2 2021.

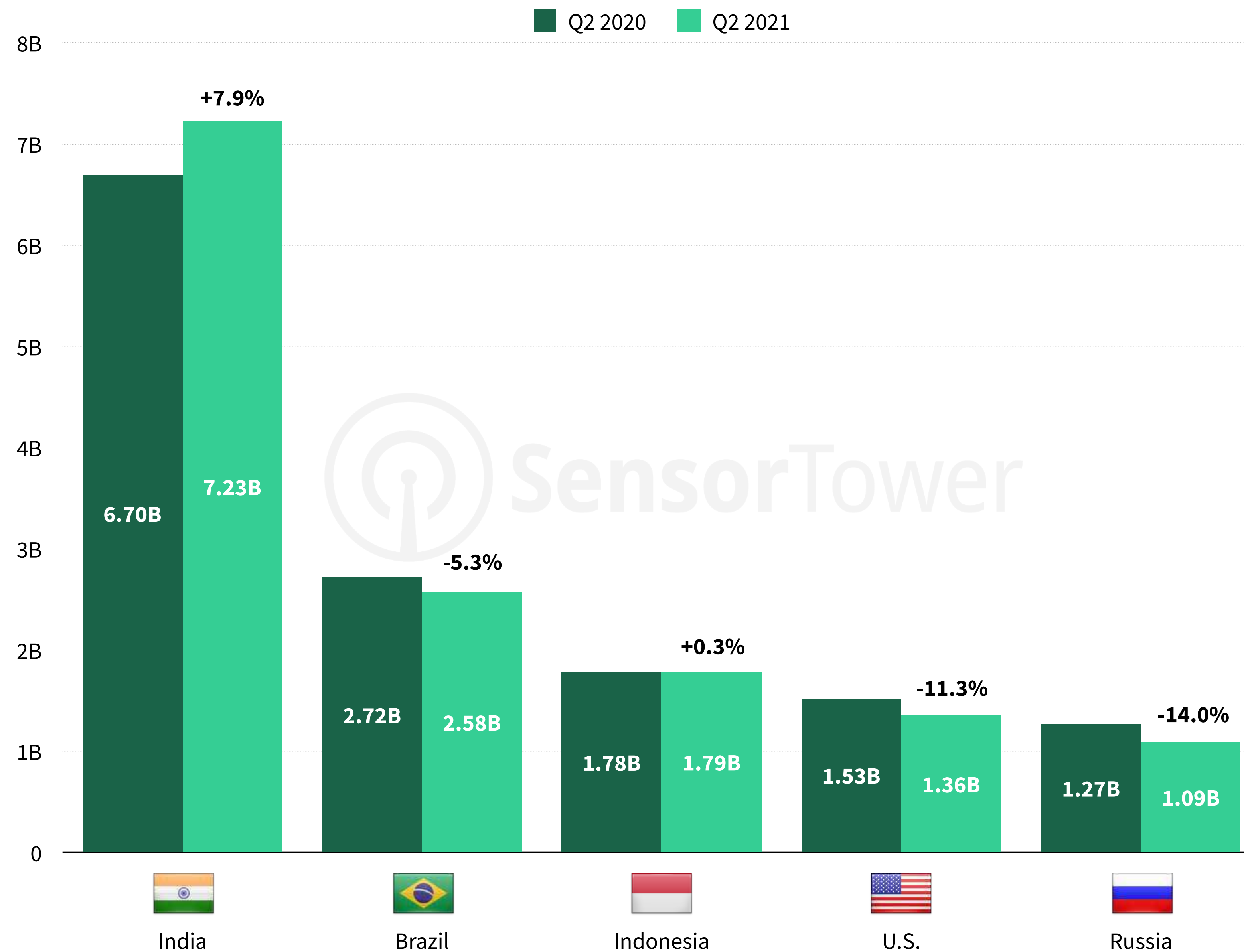
All of these countries saw a spike in installs the previous year as consumers turned to their phones to adjust to life during the pandemic.

As a result, each of these countries except for China had positive download growth since Q2 2019. The U.S. had the highest growth over this period at nearly 7 percent, followed by Japan at 6.3 percent.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Apr. 1 through Jun. 30, 2021. Apple apps are excluded. We report unique installs only (one download per User).

Google Play



Similar to the App Store, many countries also saw a year-over-year download decrease on Google Play. India was a notable exception with nearly 8 percent Y/Y growth, perhaps partially explained by new lockdowns in response to the resurgence of the COVID-19 there.

Installs in India, Brazil, and Indonesia are still up considerably compared to 2019. India's installs climbed by 2 billion between 2Q19 and 2Q21, while Brazil experienced growth of 36.8 percent over this period.

Note Regarding Download Estimates

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

Demand for rideshare apps in the U.S. began to return in Q2 2021, and some apps struggled to add enough drivers to keep pace.



2. Pokémon GO Reaches \$5 Billion

Pokémon GO surpassed \$5 billion in worldwide revenue, five years after its huge launch back in July 2016.



3. New Photo & Video Apps Emerge

Voilà AI Artist, Poparazzi, and CapCut were among the fastest growing apps by adoption in the U.S.

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Stories of the Quarter:

1. Gig Work Apps Return

The gig economy was disrupted by the pandemic. Rideshare use was down with consumers staying home or opting for travel options that didn't break their bubbles, while demand for food delivery jumped in the first few months of the pandemic. **As rideshare began to bounce back in 2021, top apps have found that new drivers are adopting the services at slower rates than consumers.**

- **In Q2 2021, Uber's installs surpassed the total from Q1 2020 for the first time since the start of the pandemic.** Lyft's downloads nearly reached their Q1 2020 level.
- **Most top food delivery apps saw U.S. downloads decline after a huge spike in Q2 2020.** Interestingly, these apps have continued to gain new users for their driver apps.
- **For Uber and Lyft, driver adoption returned at a slower rate than consumer adoption, leading to a driver shortage.** These apps made a push to increase the number of drivers, and higher downloads in May and June 2021 suggest that it is working.

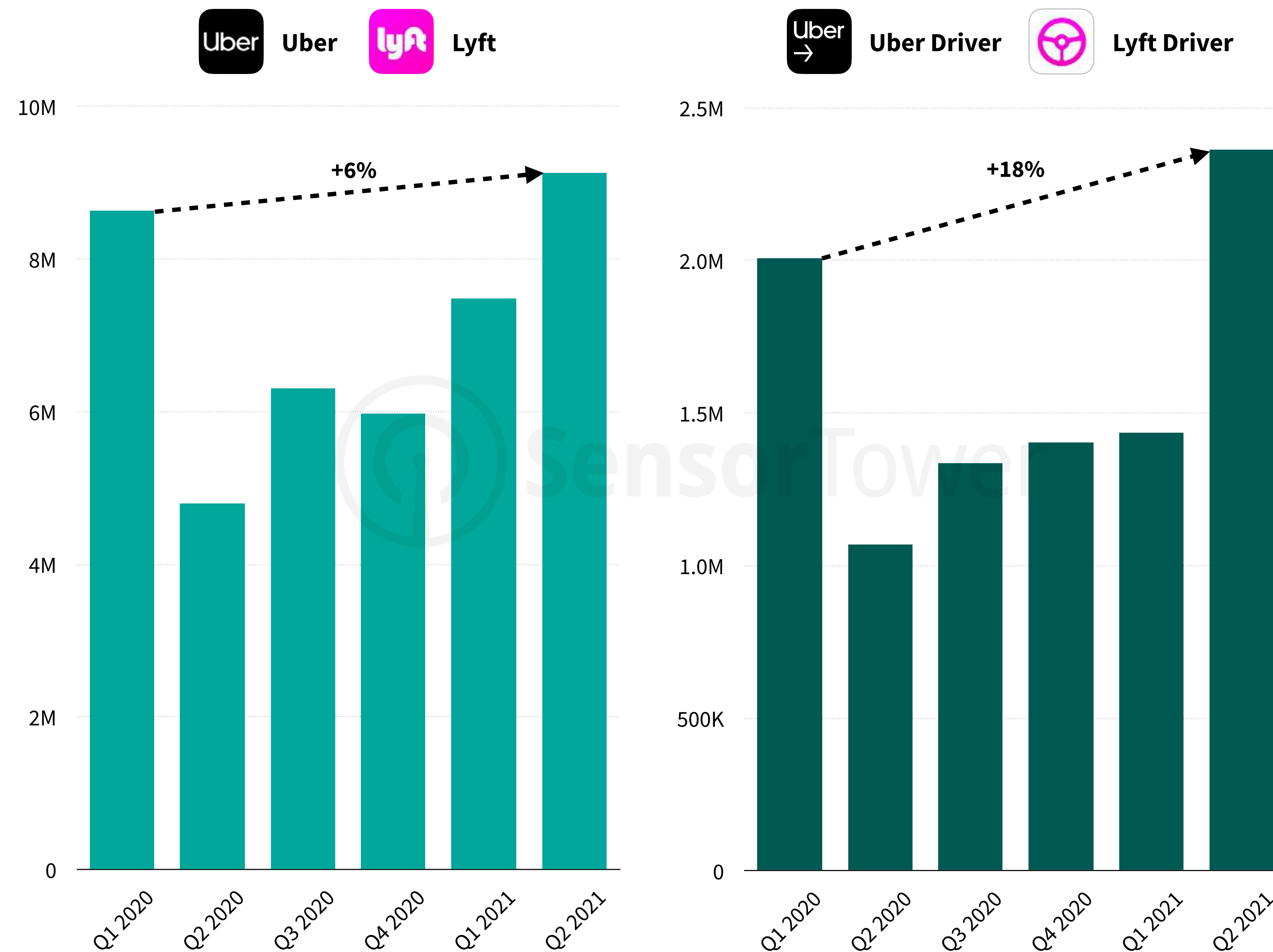


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Top U.S. Rideshare Apps Began to Return in Q2 2021

Quarterly U.S. downloads for Uber and Lyft consumer and driver apps



Demand for rideshare apps returned as the U.S. vaccine rollout allowed loosened COVID-19 restrictions. Uber's U.S. downloads surpassed their total from Q1 2020 for the first time since the pandemic in Q2 2021, and Lyft installs reached their pre-pandemic level.

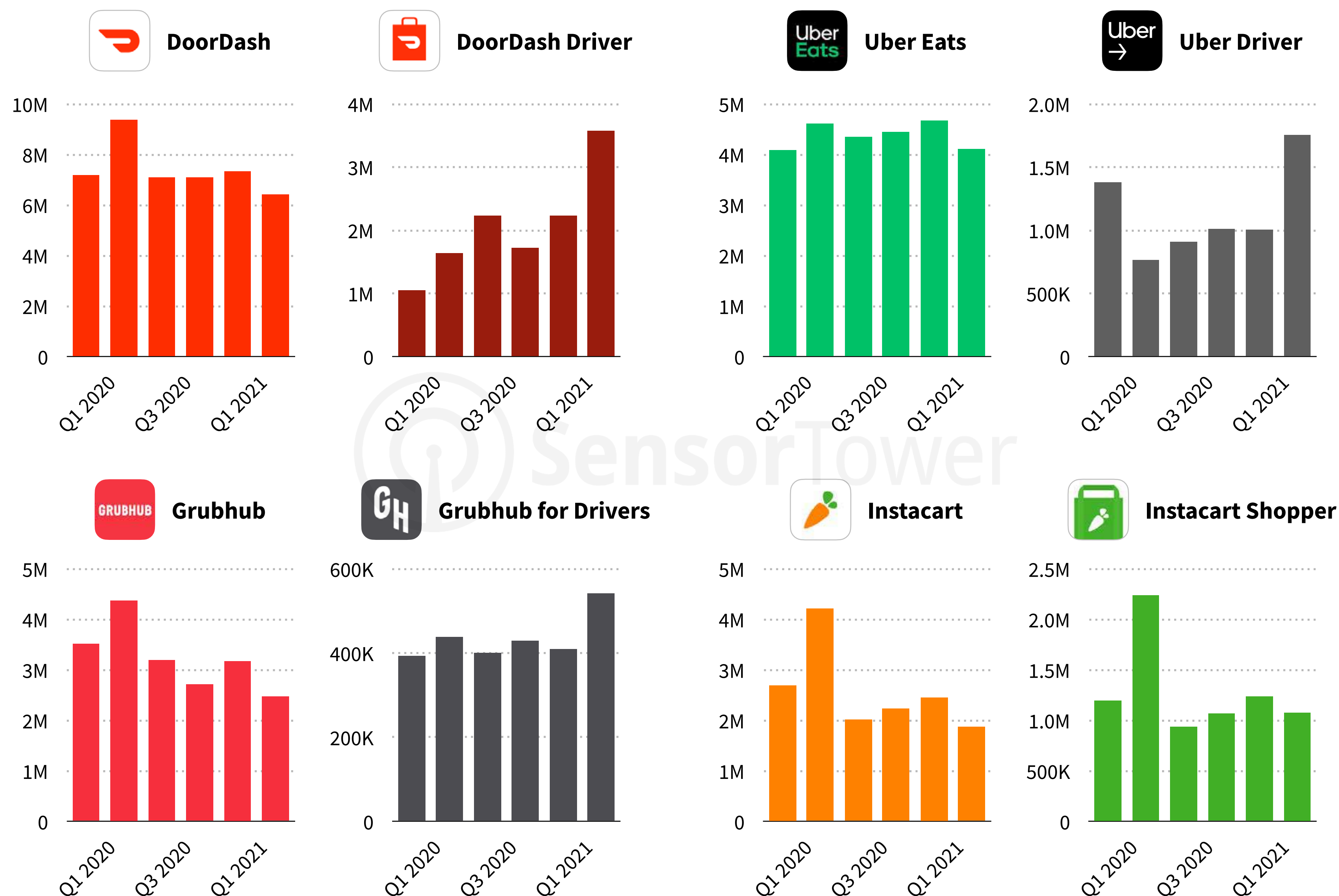
Rideshare driver apps struggled to keep pace with the the high adoption from their consumer apps in early 2021. Driver installs remained low until a recent spike in Q2 2021.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1, 2020 through Jun. 30, 2021. Apple apps and Google pre-installed apps are excluded. We report unique installs only. Android estimates do not include third-party stores.

Demand for Food Delivery Has Slowed After a Huge Q2 2020

Quarterly U.S. downloads for top food delivery consumer and driver apps



U.S. food delivery apps experienced a huge adoption boost at the start of the pandemic, especially for DoorDash, GrubHub, and Instacart. These apps were unable to sustain the gains into 2021.

Meanwhile, DoorDash Driver and GrubHub for Drivers saw record high installs in Q2 2021.

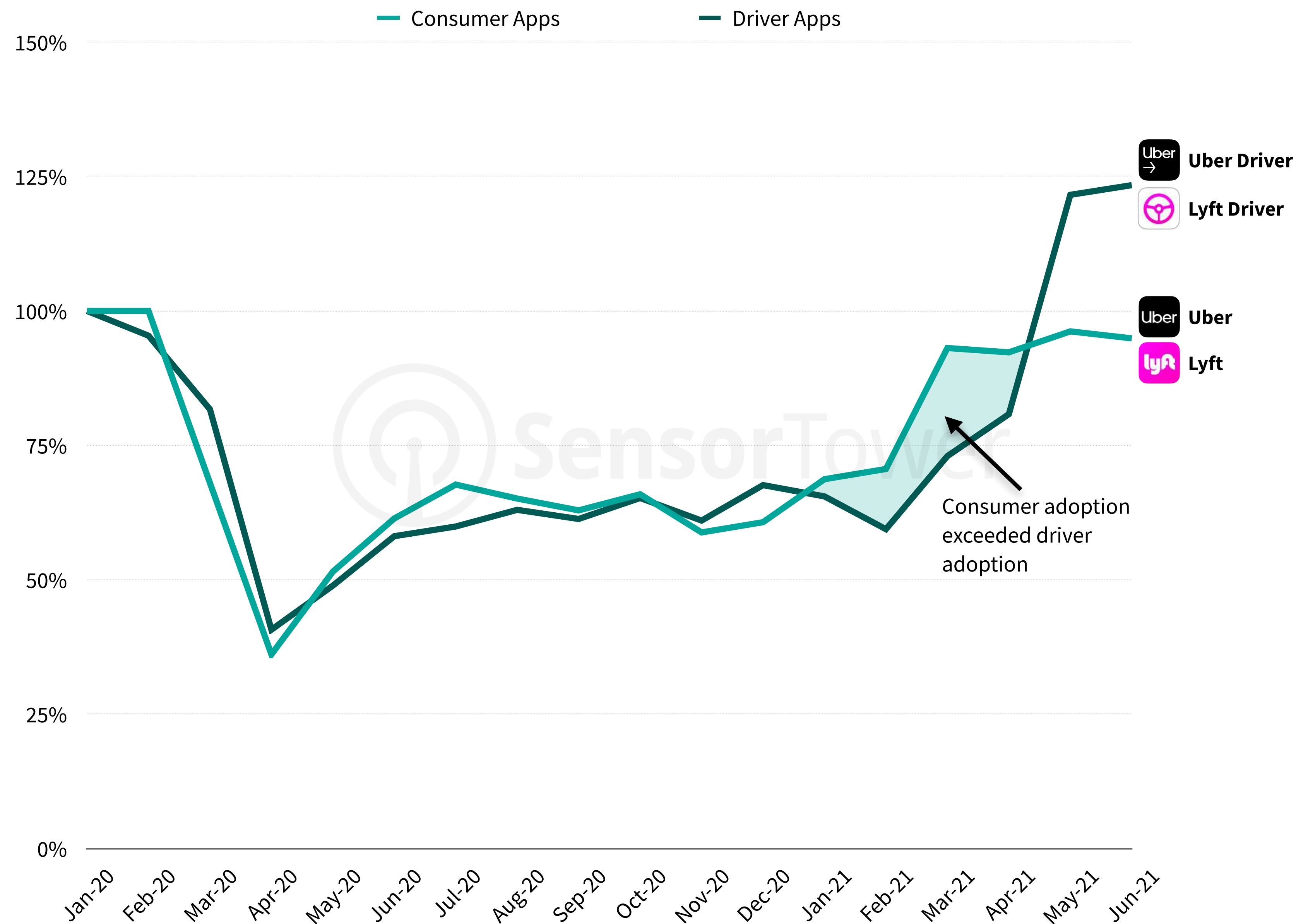
This suggests that there is still demand for food delivery drivers even as adoption for the consumer apps has declined.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1, 2020 through Jun. 30, 2021. Apple apps and Google pre-installed apps are excluded. We report unique installs only. Android estimates do not include third-party stores.

Low Adoption for Driver Apps Contributed to Driver Shortage

Monthly U.S. downloads for Uber and Lyft apps, indexed to January 2020



As vaccines became increasingly available in the U.S., demand for rideshare apps began to return to pre-pandemic levels. Driver app adoption lagged behind that of the consumer-facing apps, contributing to a driver shortage in early 2020.

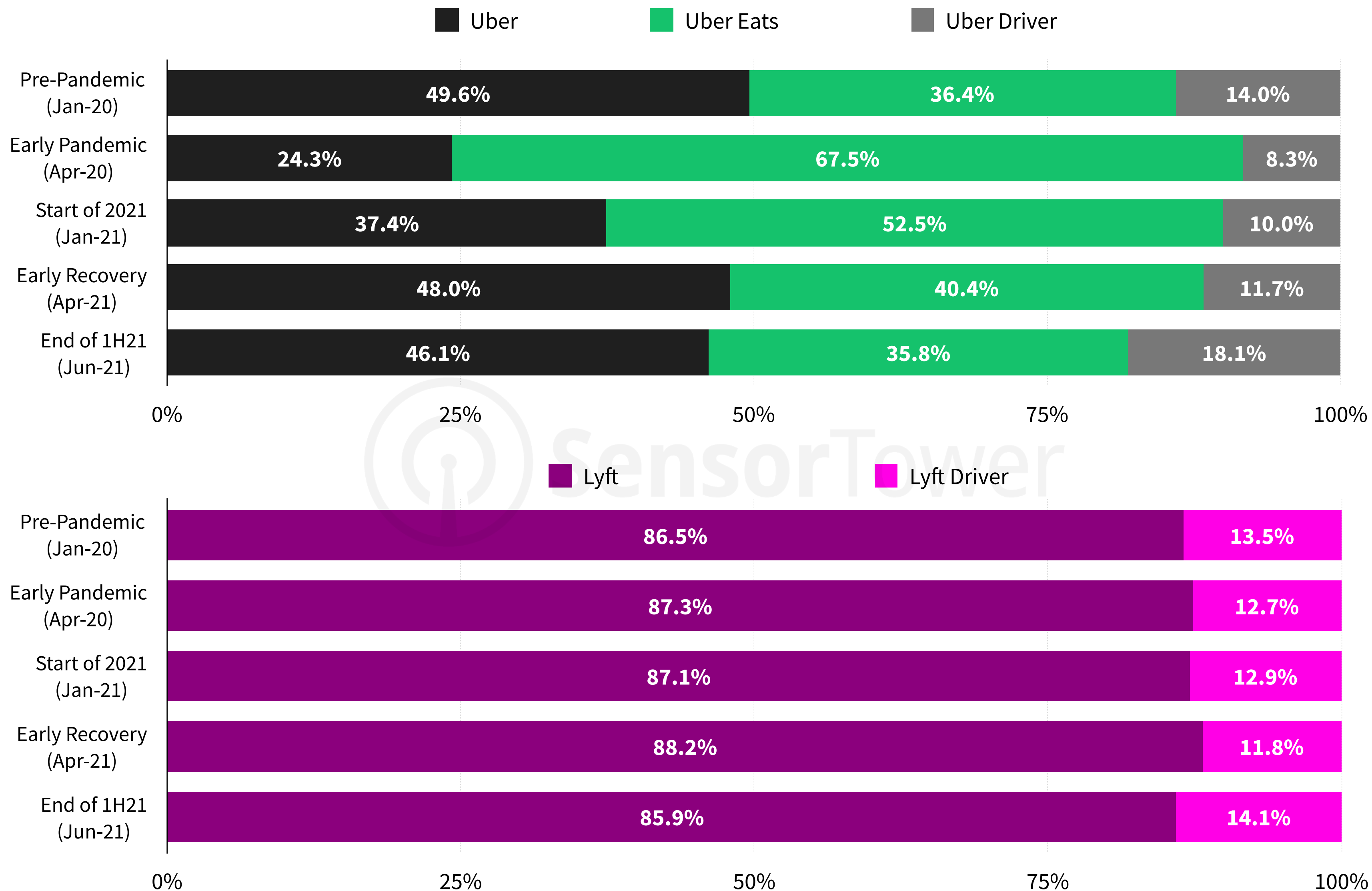
Uber used a \$250 million stimulus to boost driver pay in April 2021. It appears that the incentive seems to be working, as Uber Driver adoption spiked in the next two months.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1, 2020 through Jun. 30, 2021. Downloads were summed across the Uber and Lyft apps and then indexed vs. the total from January 2020.

Uber and Lyft Pushed to Add More Drivers in Q2 2021

Monthly U.S. download market share for Uber and Lyft apps



By April 2021, driver app adoption was still relatively low compared to consumer app adoption. Uber Driver accounted for 11.7 percent of Uber's total installs, down from 14 percent in January 2020. Lyft Driver's share fell by 1.7 percentage points over this period.

Facing a driver shortage, the rideshare apps pushed to add new drivers in June 2021. Uber Driver had more than 18 percent of the company's downloads that month, and Lyft Driver also saw a higher share.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1, 2020 through Jun. 30, 2021. Apple apps and Google pre-installed apps are excluded. We report unique installs only. Android estimates do not include third-party stores.

Stories of the Quarter:

2. Pokémon GO Reaches \$5 Billion

In a little less than five years since its launch in July 2016, Pokémon GO surpassed \$5 billion in global consumer spending across the App Store and Google Play.

- **After Fate/Grand Order and PUBG Mobile surpassed \$5 billion earlier this year, Pokémon GO became the eighth game to hit this milestone.** It ranks No. 4 by revenue since its launch in July 2016.
- **Pokémon GO has managed to keep pace with the global game market, seeing its revenue grow at roughly the same rate.** This is impressive longevity for a game that's been available for five years.
- **Pokémon GO had a relatively diverse market, with no country contributing more than 40 percent of its revenue.** It was only one of two game in the top 10 by revenue since its launch to not have the majority of its revenue come from a single market.



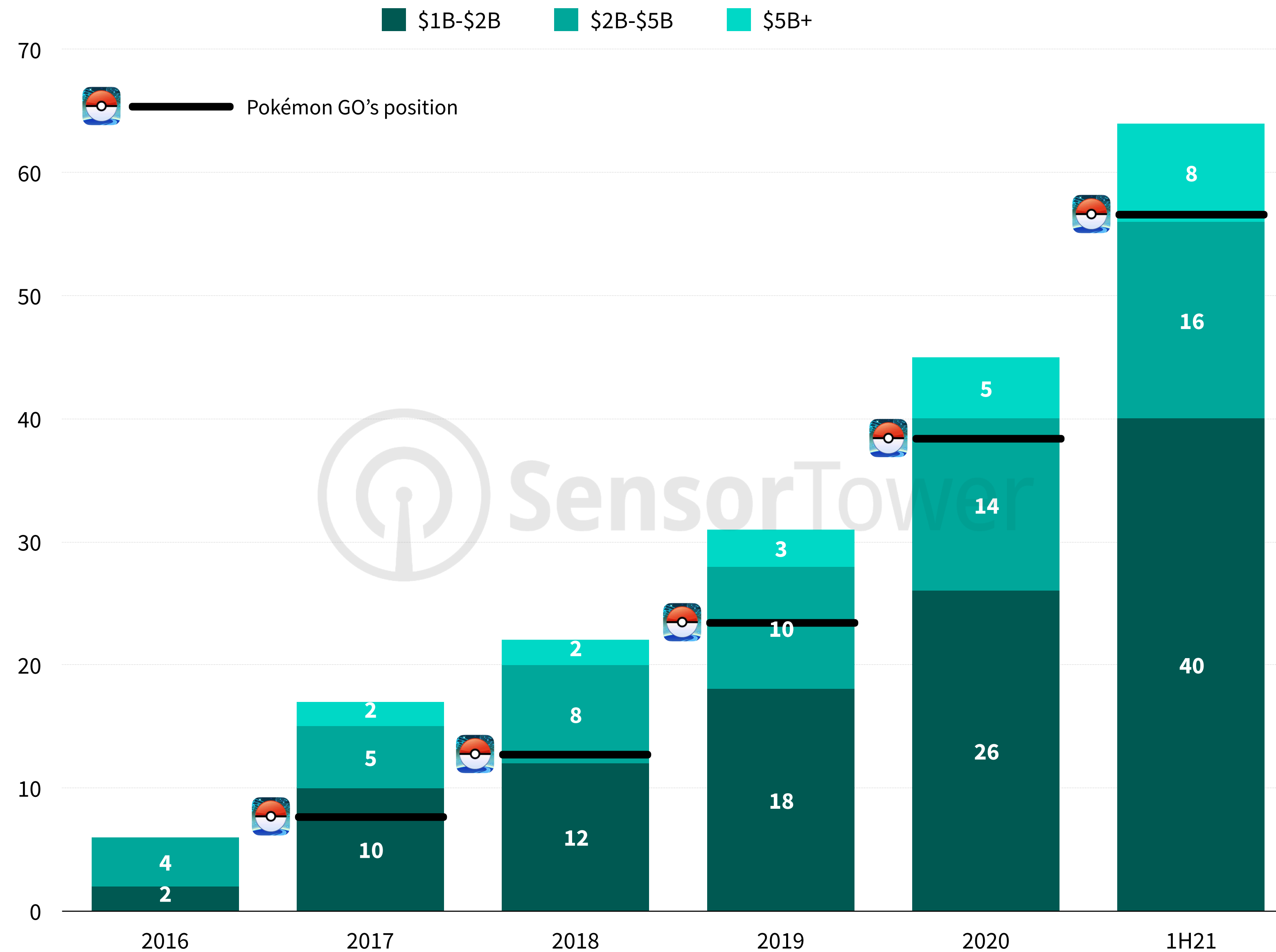
Pokémon GO

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Pokémon GO Became the Eighth Mobile Game to Reach \$5B

Number of games with \$1B in cumulative revenue since 2014 as of the end of each period



By the end of 2016, only six games had reached \$1 billion (since the start of 2014). **Sixty-four games had surpassed \$1 billion in all-time revenue by 1H21, including eight games with more than \$5 billion.**

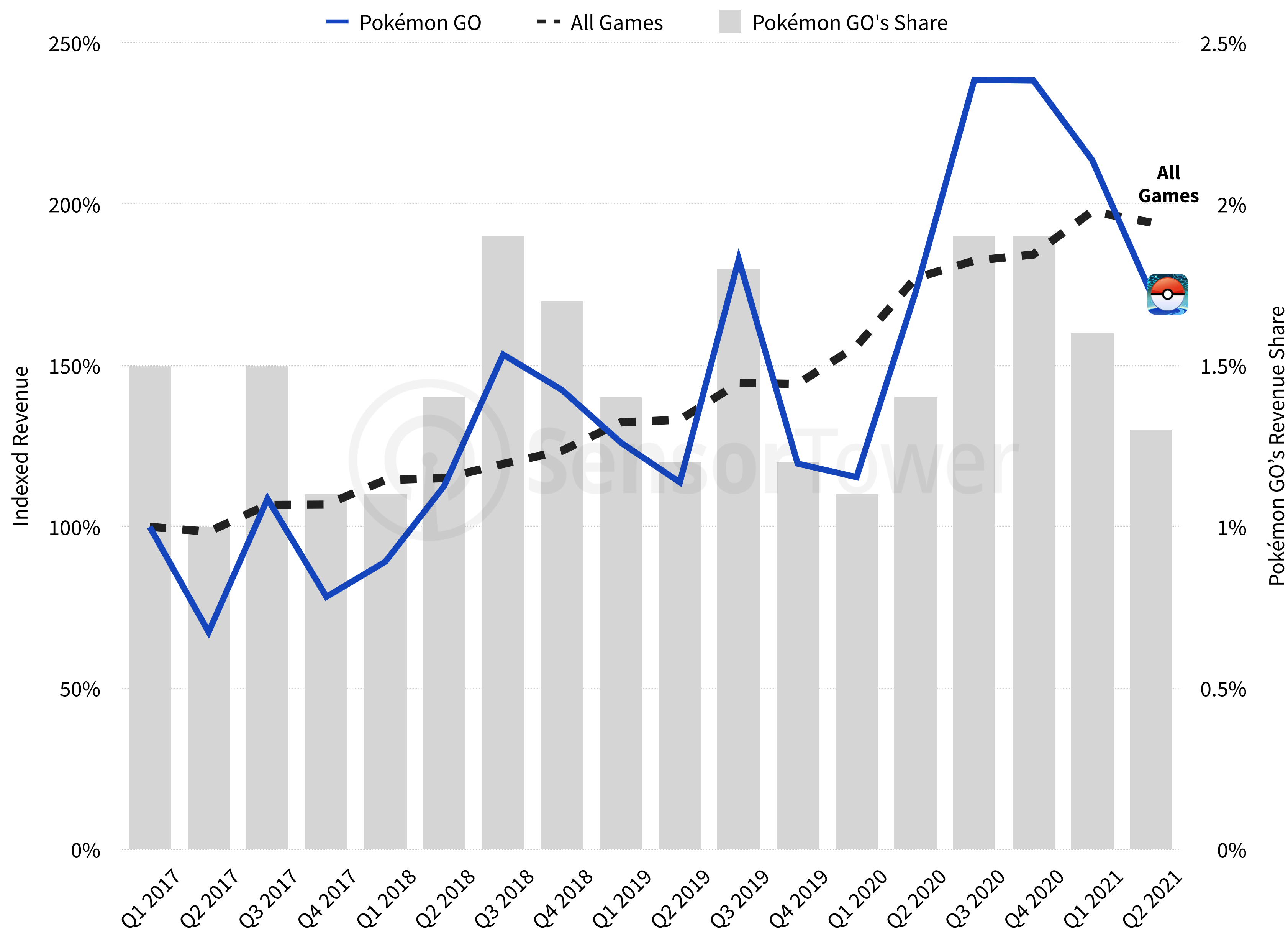
Pokémon GO became the eighth game to surpass \$5 billion in revenue since 2014. Fate/Grand Order and PUBG Mobile also reached this threshold in 1H21.

Note Regarding Revenue Estimates

Our estimates include worldwide revenue for iPhone, iPad, and Google Play for Jan. 1, 2014 through Jun. 30, 2021. We report gross revenue (including the cut for Apple or Google). Android estimates do not include third-party stores.

Pokémon GO Has Kept Pace with the Game Market Since 2017

Worldwide quarterly revenue for Pokémon GO and all games, indexed to Q1 2017



Pokémon GO's revenue growth has kept pace with that from the mobile gaming market as a whole since 2017, which is all the more impressive given the influx of successful launches during this period.

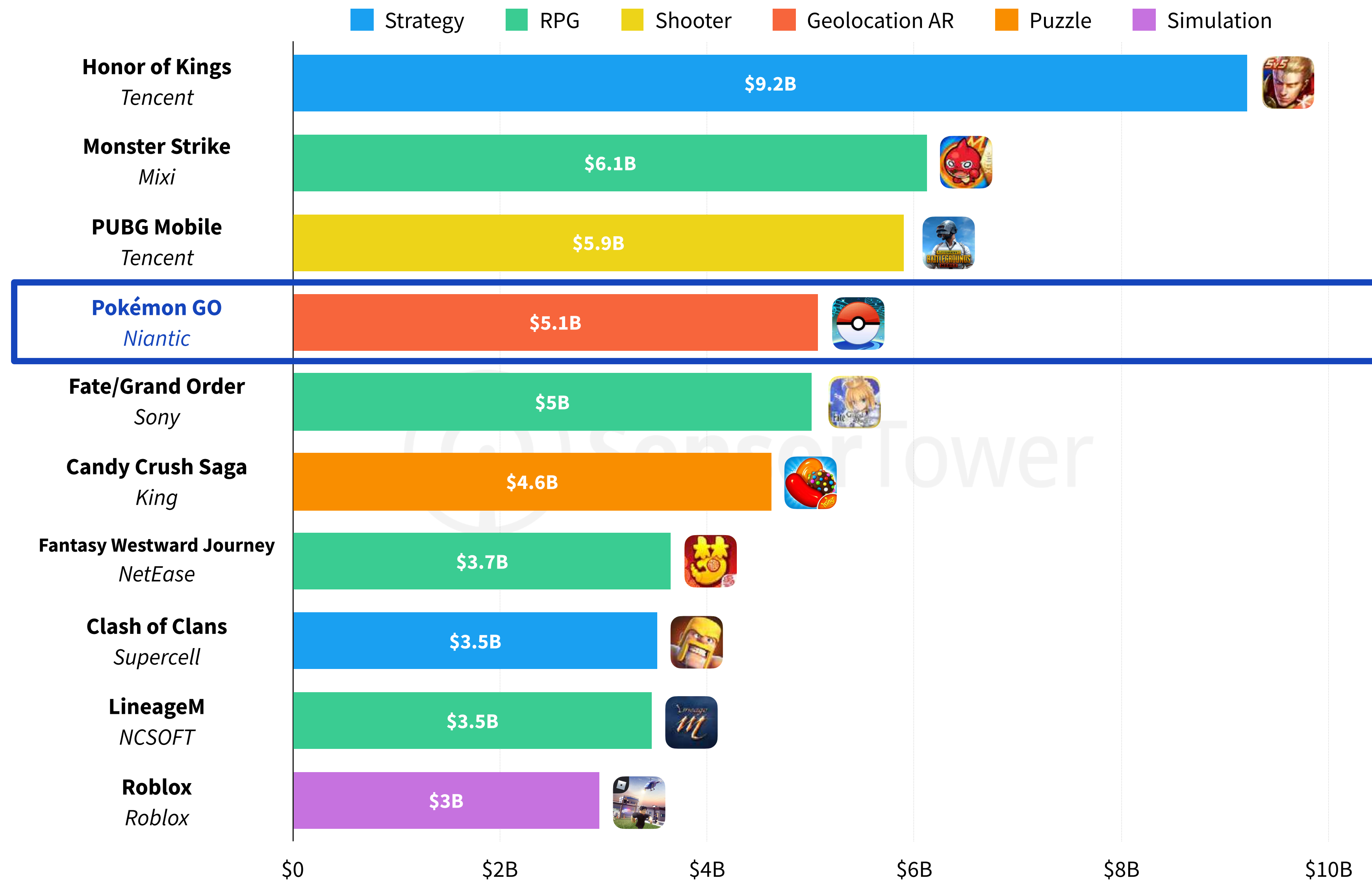
Pokémon GO has accounted for at least 1 percent of the mobile game market since the start of 2017. It performed particularly well during the pandemic, reaching about 1.9 percent market share in Q3 and Q4 2020.

Note Regarding Revenue Estimates

Our estimates include worldwide revenue for iPhone, iPad, and Google Play for Jan. 1, 2017 through Jun. 30, 2021. We report gross revenue (including the cut for Apple or Google). Revenue is indexed vs. the total from Q1 2017. Android estimates do not include third-party stores.

Pokémon GO Has the Fourth Most Revenue Since Its Launch

Top games by worldwide revenue since Pokémon GO's launch on July 6, 2016



Pokémon GO ranks No. 4 by revenue since its launch in 2016. It is the only top game to have the U.S. as its largest market.

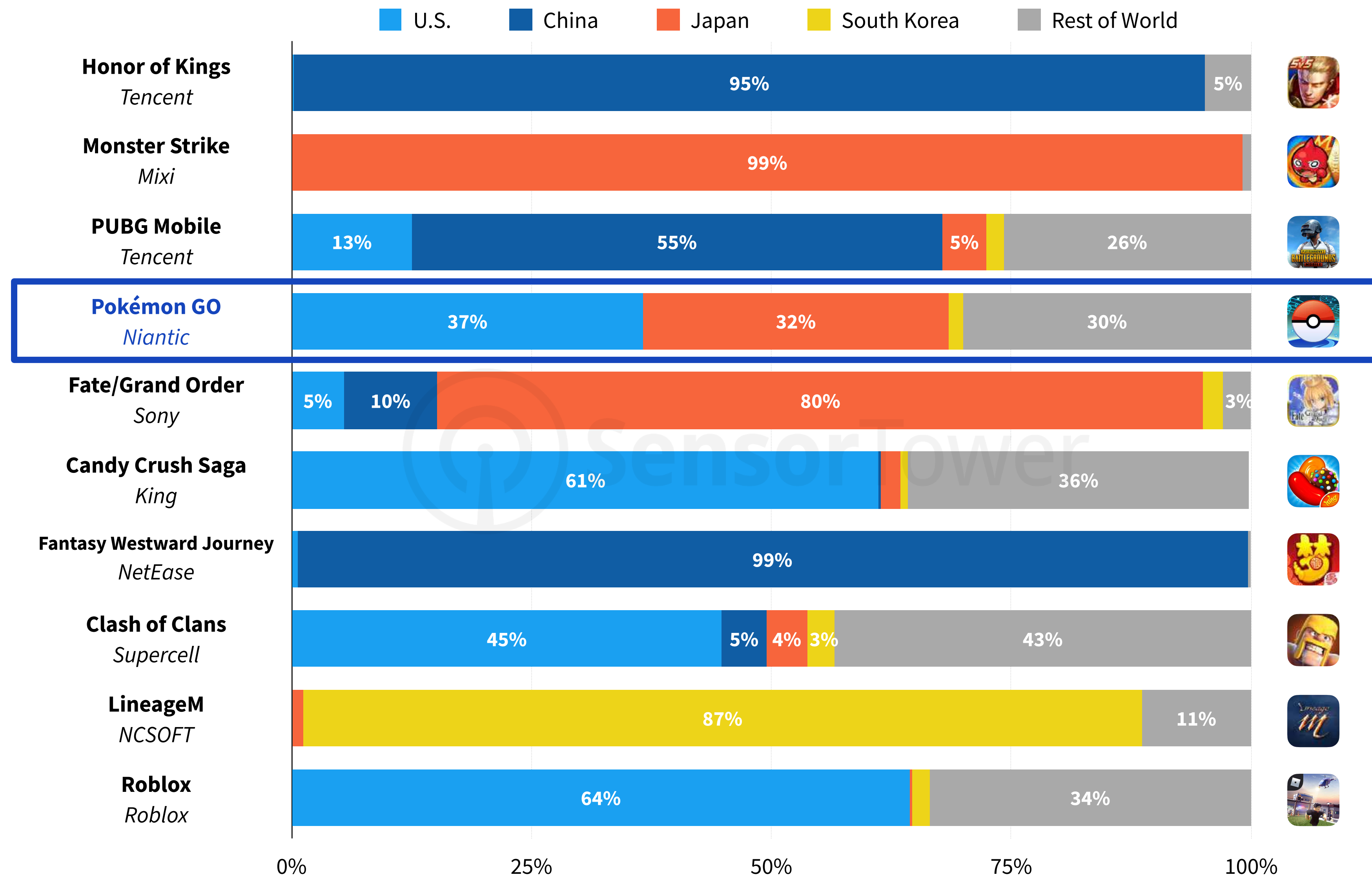
Honor of Kings leads the way with more than \$9 billion in revenue on the App Store and Google Play since July 6, 2016. The game accumulated nearly \$8.8 billion on the App Store in China alone

Note Regarding Revenue Estimates

Our estimates include worldwide revenue for iPhone, iPad, and Google Play for Jul. 6, 2016 through Jun. 30, 2021. We report gross revenue (including the cut for Apple or Google). Android estimates do not include third-party stores. PUBG Mobile revenue includes China, where the game is called Game for Peace.

A Rare Success in Multiple Markets

Country market share for top games by worldwide revenue since July 6, 2016



Many top games received the vast majority of their revenue from one country. Three games had more than 50 percent of their revenue from China. Meanwhile, two games had the majority of their revenue from Japan, and another two had a majority from the U.S.

Pokémon GO was a rare success across multiple markets as it was one of just two apps among the top 10 to not have a majority of its revenue from one country. Supercell's Clash of Clans was the other.

Note Regarding Revenue Estimates

Our estimates include worldwide revenue for iPhone, iPad, and Google Play for Jul. 6, 2016 through Jun. 30, 2021. We report gross revenue (including the cut for Apple or Google). Android estimates do not include third-party stores.

Stories of the Quarter:

3. New Photo & Video Editors Emerge

Several Photo & Video apps became viral hits in 2021's second quarter, including **Voilà AI Artist**, **Poparazzi**, and **CapCut**.

- **Four of the top 10 apps by quarter-over-quarter download growth were Photo & Video apps.** These included two recent releases (Voilà AI Artist and Poparazzi), one 2020 launch that's steadily gained momentum (CapCut), and one app that's been available for several years (VSCO).
- **Each of these four Photo & Video apps reached the top spot on the free U.S. iPhone app chart, including Voilà AI Artist topping the chart for nine straight days.** This reveals how much of these apps' success can be driven by catching a viral moment.
- **The successful monetization for some top photo and video editing apps shows potential for these apps that have rapidly expanded their user base.**

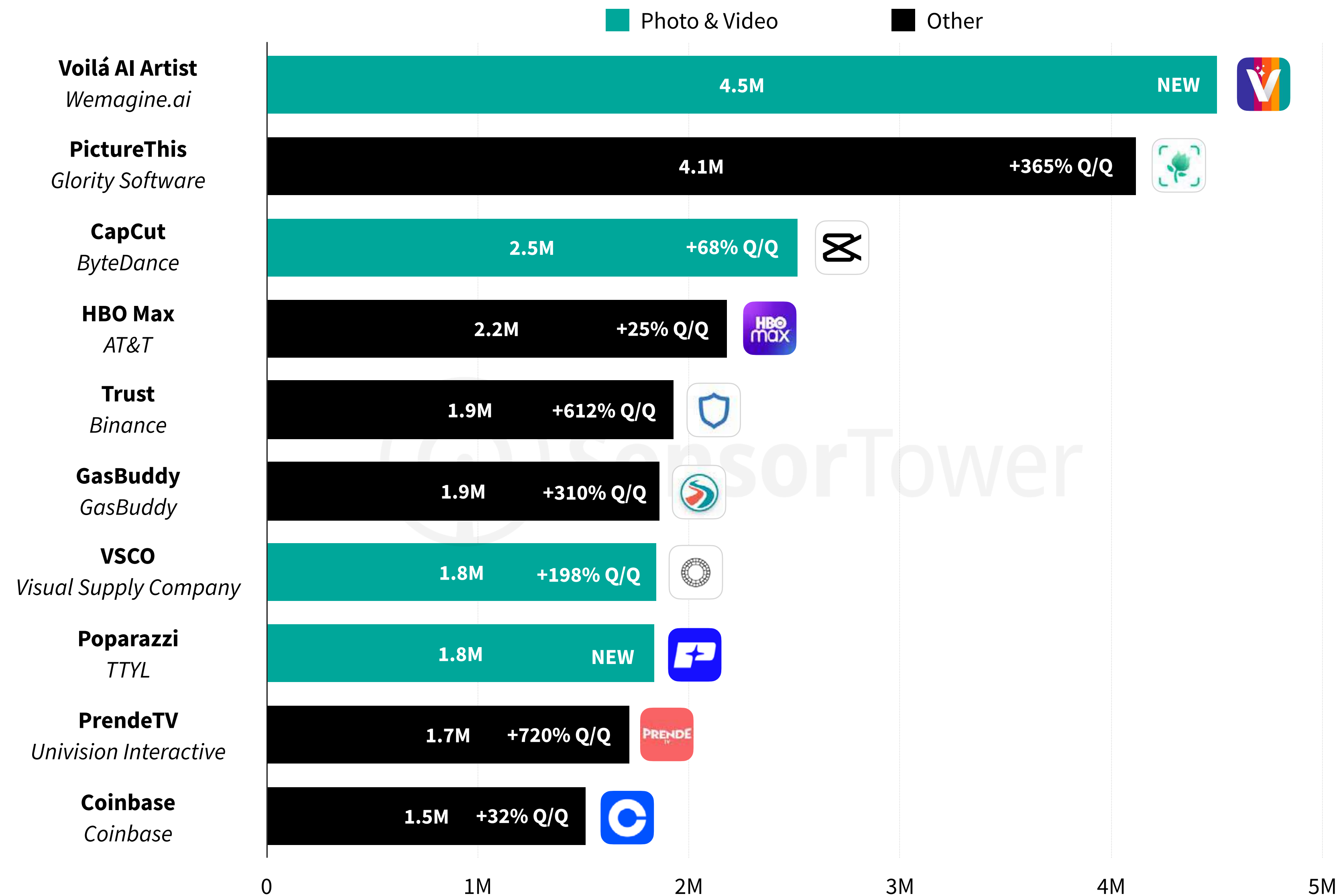


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Photo & Video Apps Saw Huge Install Growth in the U.S.

Top non-game apps by raw U.S. quarter-over-quarter download growth



Four Photo & Video apps were among the top 10 apps by raw U.S. download growth in Q2 2021. Voilà AI Artist, released late in Q1 2021, led the way with an increase of 4.5 million downloads quarter-over-quarter.

Top growing apps included a mix of new arrivals and more established apps. Poparazzi was another successful launch in Q2 2021, while VSCO adoption took off after launching eight years prior.

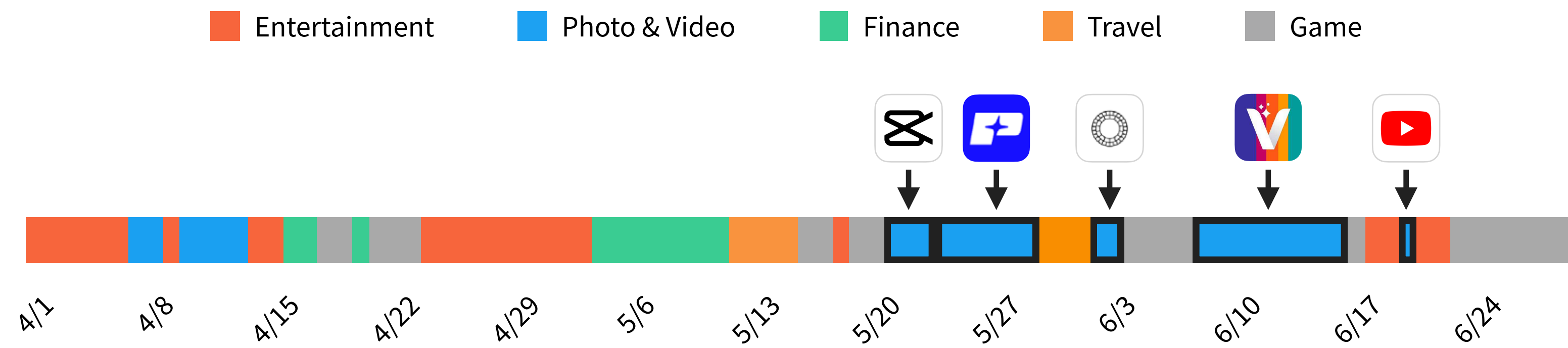
Note Regarding Download Estimates

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

Five Photo & Video Apps Topped the Charts Since Late May

Days ranked as the top free U.S. iPhone app by downloads

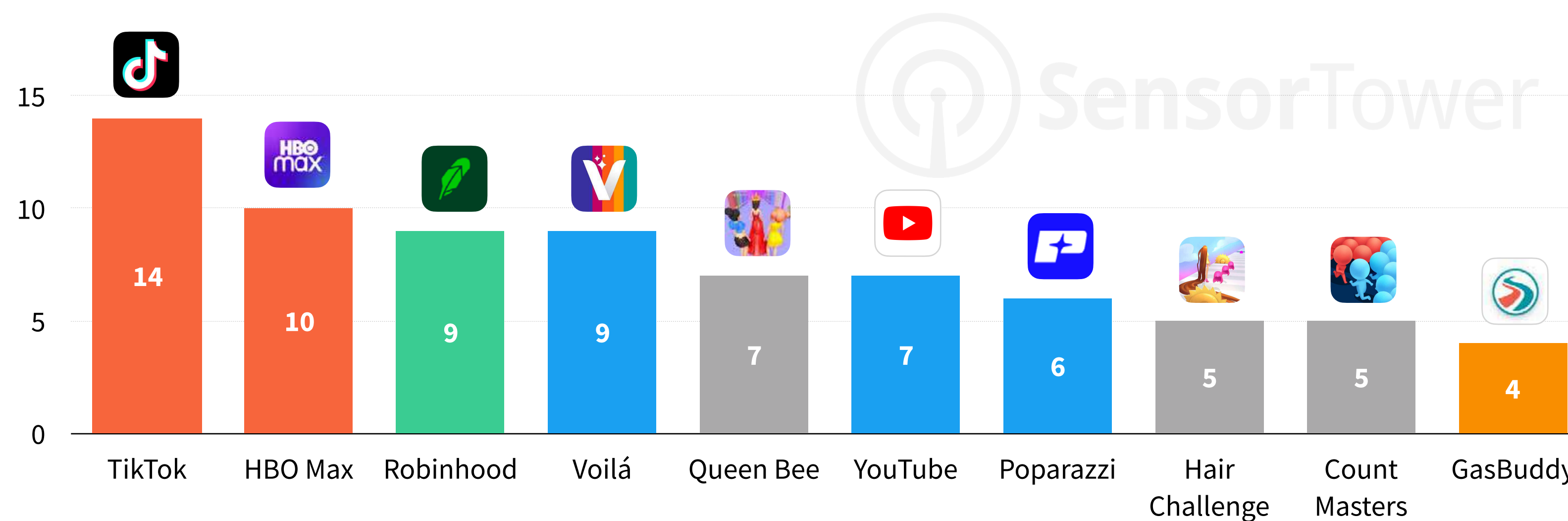
Daily Top Ranked Free U.S. iPhone Apps



Early in 2021, well-established apps from large companies frequently topped the U.S. iPhone chart. HBO Max, TikTok, YouTube, and Robinhood each reached No. 1 for four or more days in a row.

A cluster of Photo & Video apps began to reach No. 1 in late May, pointing to how these apps can rely on a viral moment to propel their adoption. Voilá AI Artist had the longest consecutive stretch of days at No. 1 for any app in the quarter at nine days.

Number of Day Ranked No. 1 in the Quarter

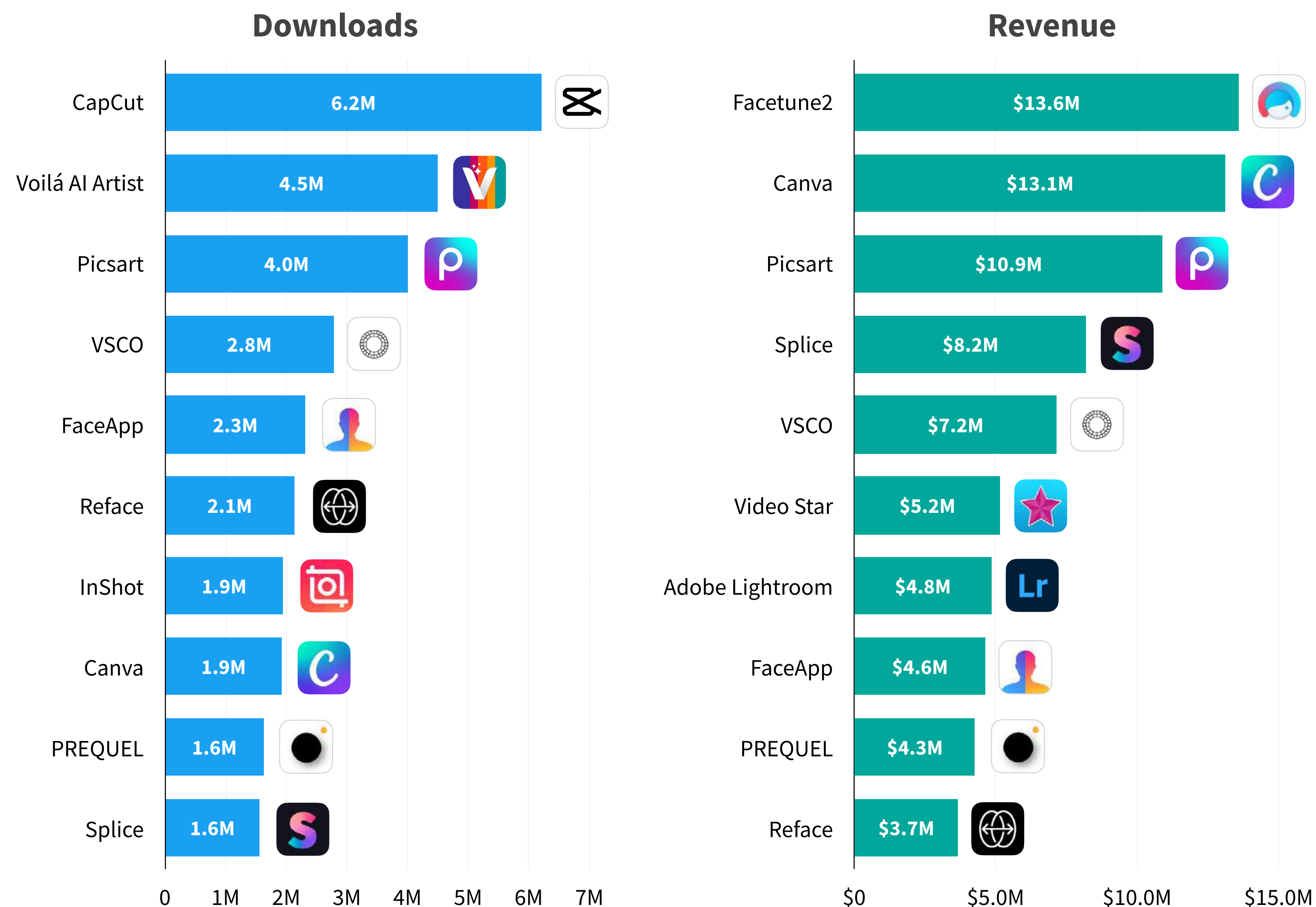


Note Regarding Rankings Data

Data includes daily top free apps rankings for iPhone apps in the U.S. between Apr. 1, 2021 and Jun. 30, 2021. Apps are categorized by their primary category on the U.S. App Store.

Photo and Video Editing is a Healthy Market in the U.S.

Top 10 U.S. photo and video editing apps by U.S. downloads and gross revenue in Q2 2021



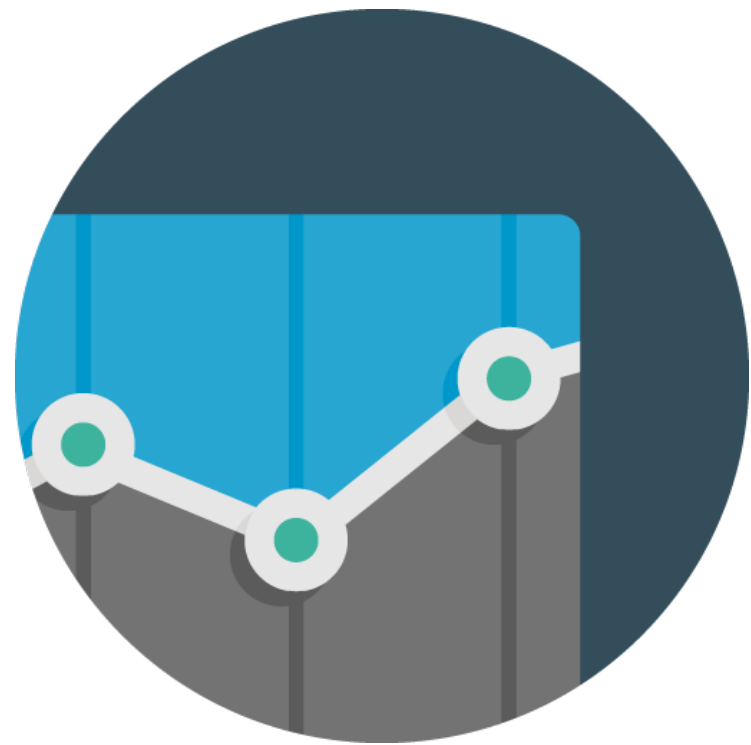
High quarter-over-quarter growth propelled CapCut, Voilà AI Artist, and VSCO to three of the top four spots by U.S. downloads in Q1 2021. Since these apps are still growing their user base, most have yet to reach the top 10 by revenue as of Q2 2021.

The successful monetization for a number of photo and video editors suggests potential for some of these recently emerging apps in Q2 2021. Three apps surpassed \$10 million in U.S. revenue in Q2 2021, and another three reached \$5 million.

Note Regarding Download and Revenue Estimates

Our estimates include worldwide downloads and revenue for iPhone, iPad, and Google Play for Apr. 1, 2021 through Jun. 30, 2021. Revenue figures are gross revenue (including the cut taken by Apple or Google). Android estimates do not include third-party stores.

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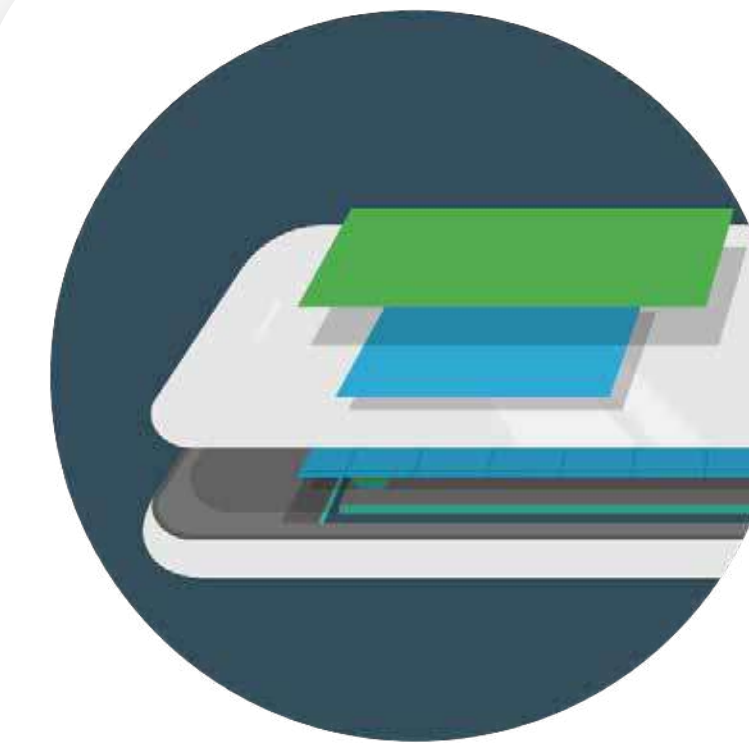
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Sensor Tower

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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, Usage Intelligence, and Consumer Intelligence.

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