Sensor Tower

Q4 2023: **Store Intelligence Data Digest**

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



About This Data:
Methodology

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

- Figures cited in this report reflect App Store and Google Play download estimates for October 1, 2023 through December 31, 2023.
- 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.



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Q4 2023 Data Digest: Executive Summary

Q4 2023 marked another transformative quarter for the mobile economy, with downloads reaching 33.4 billion, a decrease of 6% year-over-year (YoY). Google Play downloads softened, showing an 8% decline compared to the previous year, while iOS downloads continued to grow, registering a 1.3% increase. This growth in downloads was primarily driven by emerging markets, which have become pivotal for Apple's growth, with some of these markets seeing their best-ever quarterly sales in 2023.

- **Non-Game Apps**: In Q4 2023, TikTok clinched the No. 1 position in global app downloads, driven largely by its increasing popularity in China, where it operates as Douyin. Installs in China soared by over 80% YoY, a surge likely fueled by TikTok's expansion into e-commerce and food delivery sectors. Despite this, it was Instagram that dominated the Asian continent by downloads, with India, where the app's popularity has increased significantly following the 2020 ban of TikTok, its largest market. An overview of download rankings would not be complete without mentioning the shopping app Temu. Despite competitors like Shein ramping up ad spend (up 120% in Q4 2023 YoY in the US), Temu has continued to ascend the rankings across Western markets since its launch, maintaining its status as the most downloaded app in both Europe, up 12% quarter-over quarter (QoQ) and the US (up 129% YoY).

- **Gaming**: In the gaming space, Garena Free Fire continued its dominance in global game downloads for the second quarter in a row, recording over 56 million downloads, up 14% YoY. Geographically, Asia led the mobile gaming space by downloads, with Ludoking retaining its top position in the region with over 37 million installs (up 4% YoY), contributing to the continent's total of 5.3 billion downloads for the quarter (down 10% YoY) —the highest across all regions.

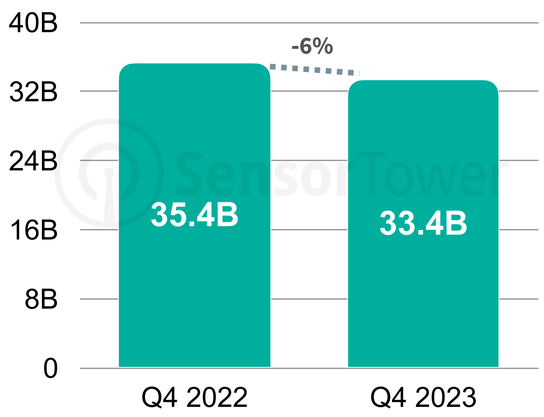
- **Stickiness**: In Q4 2023, Google and Meta emerged as leaders in global app 'stickiness,' a metric newly tracked by Sensor Tower in its quarterly Data Digests, which measures the percentage of monthly active users (MAUs) engaging with an app daily. Globally, WhatsApp was the 'stickiest' app in Q4 2023, with over 90% of its MAUs returning daily, while Instagram led the top social media apps with a 79% stickiness rate. In the US, TikTok's 'stickiness' (60% in Q4 2023) has remained stable in the past two years, underscoring a loyal core user base, despite facing increasing regulatory challenges and a marginal YoY dip (-4%) in its MAUs in 2023 YoY. In Japan, Facebook's 'stickiness' was significantly lower at 51% compared to 65% in the UK and 64% in the US in Q4 2023, likely due to its distinct user demographic and competition from super apps like Line.

- **Markets**: In Q4 2023, India continued to lead the worldwide mobile app market with a remarkable 6.1 billion downloads across both stores. While Google Play downloads were down 13% YoY, iOS installs showed a significant increase (up 18% YoY), a trend likely bolstered by a growing middle class and its increasing affordability of premium products, including Apple phones. Meanwhile, Africa is carving out a significant role in the global download market. Nigeria, the continent's most populous country, made a substantial leap in the global download rankings, ascending 5 positions in Q4 2023 YoY to rank 24, registering the highest download growth rate, adding over 50 million more downloads in Q4 2023 YoY.

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Market Overview: Q4 2023 Worldwide Download Growth

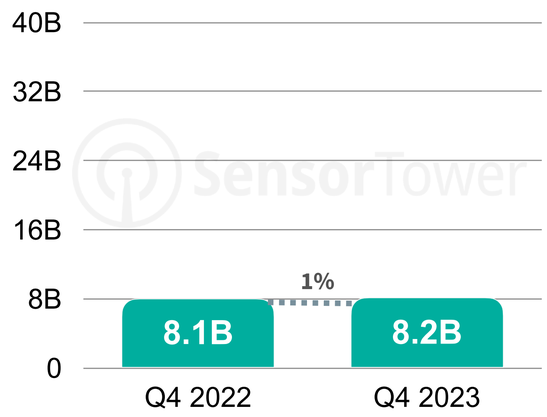
Worldwide App Store and Google Play Downloads



33.4 Billion

App Store + Google Play Downloads in Q4 2023

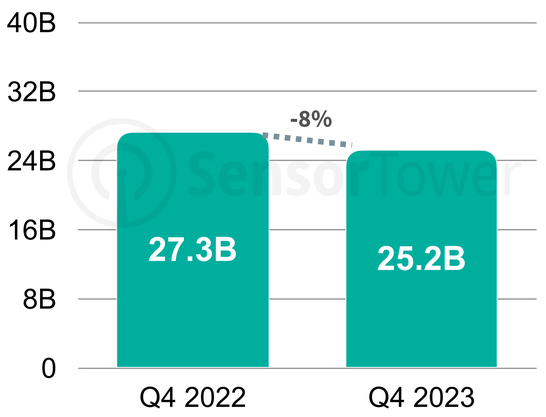
Worldwide App Store Downloads



8.2 Billion

App Store Downloads in Q4 2023

Worldwide Google Play Downloads



25.2 Billion

Google Play Downloads in Q4 2023

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Top Apps
by Downloads in Q4 2023

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Overall - Worldwide

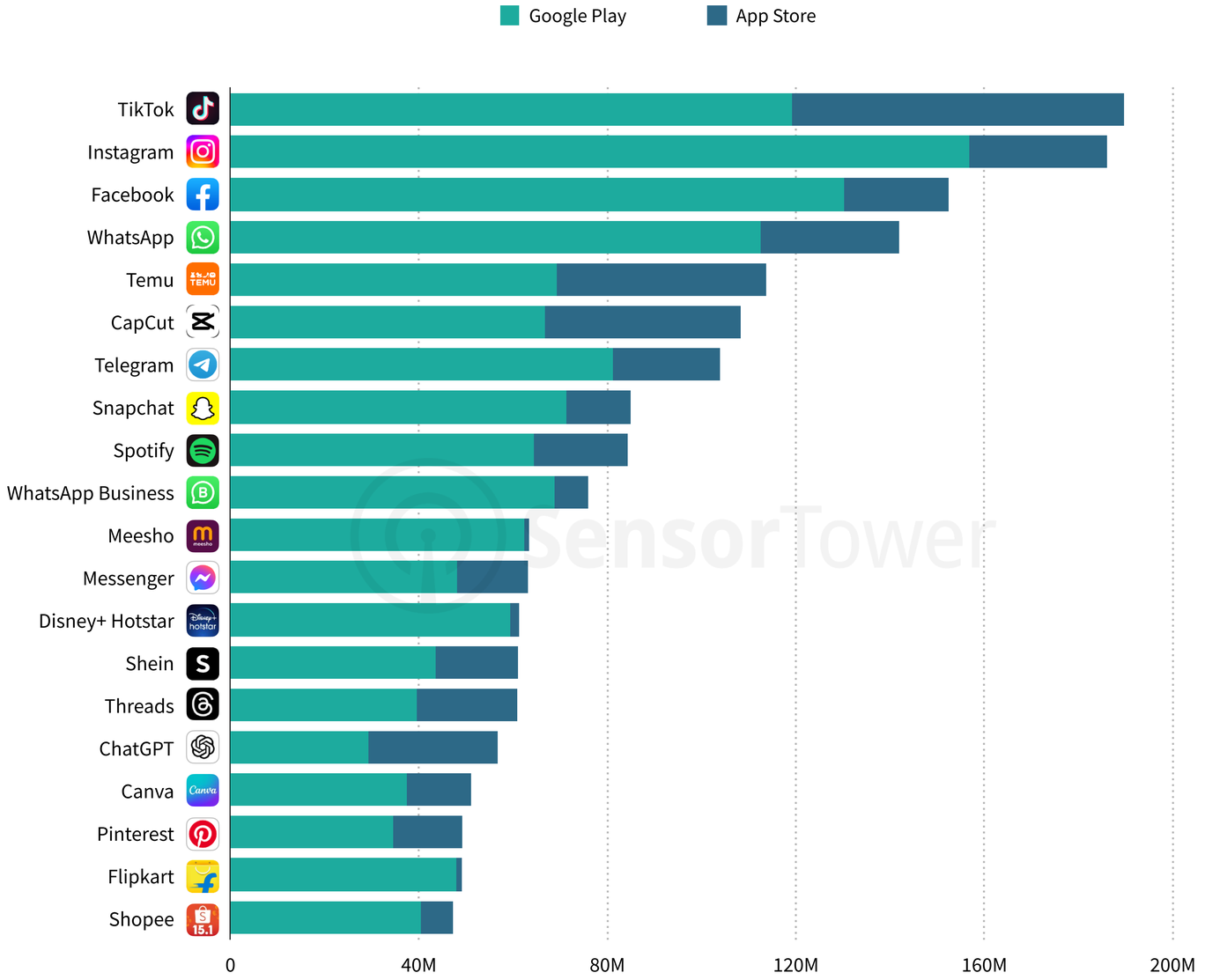
Top Apps by Worldwide Downloads

In Q4 2023, TikTok secured the No. 1 spot in worldwide app downloads, with 190 million downloads, closely followed by Instagram. Throughout 2023, TikTok and Instagram have intensely competed for the leading position, each securing the top spot for two quarters in 2023. TikTok's worldwide downloads in Q4 2023, which increased by 8% YoY, were significantly bolstered by its growing popularity in China, where it operates as Douyin. Chinese downloads of the app surged by 85% YoY during the quarter. China contributed to 19% of TikTok's global downloads in Q4 2023, an increase of 8 percentage points (ppts) from the previous year, likely fueled by TikTok's expansion into e-commerce and food delivery.

Q4 2023 also saw a notable increase in shopping apps in the rankings, aligning with a period of heightened consumer activity during global retail and holiday events, including Black Friday and the Diwali festivities. The rise of Temu was noteworthy, with the app jumping 3 positions QoQ, reaching 113 million downloads worldwide and becoming the top shopping app by downloads. In a notable shift, Amazon exited the top 20 for the first time in the last quarter of the year since Q4 2015, underscoring the rising competition from new shopping platforms, particularly in periods of peak demand such as the holiday shopping season.

X's new competitor, Threads, which ranked as the fifth most downloaded app worldwide in Q3 2023 upon its launch, struggled to maintain this momentum in Q4 2023, dropping to position No 15. Its official European Union launch in December 2023 could be crucial in regaining popularity in 2024.

Note Regarding Download Estimates
Our estimates include downloads for iPhone, iPad, and Google Play in Q4 2023. Apple apps and Google pre-installed apps are excluded. We report unique installs only. Android estimates do not include third-party stores.



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Overall - United States

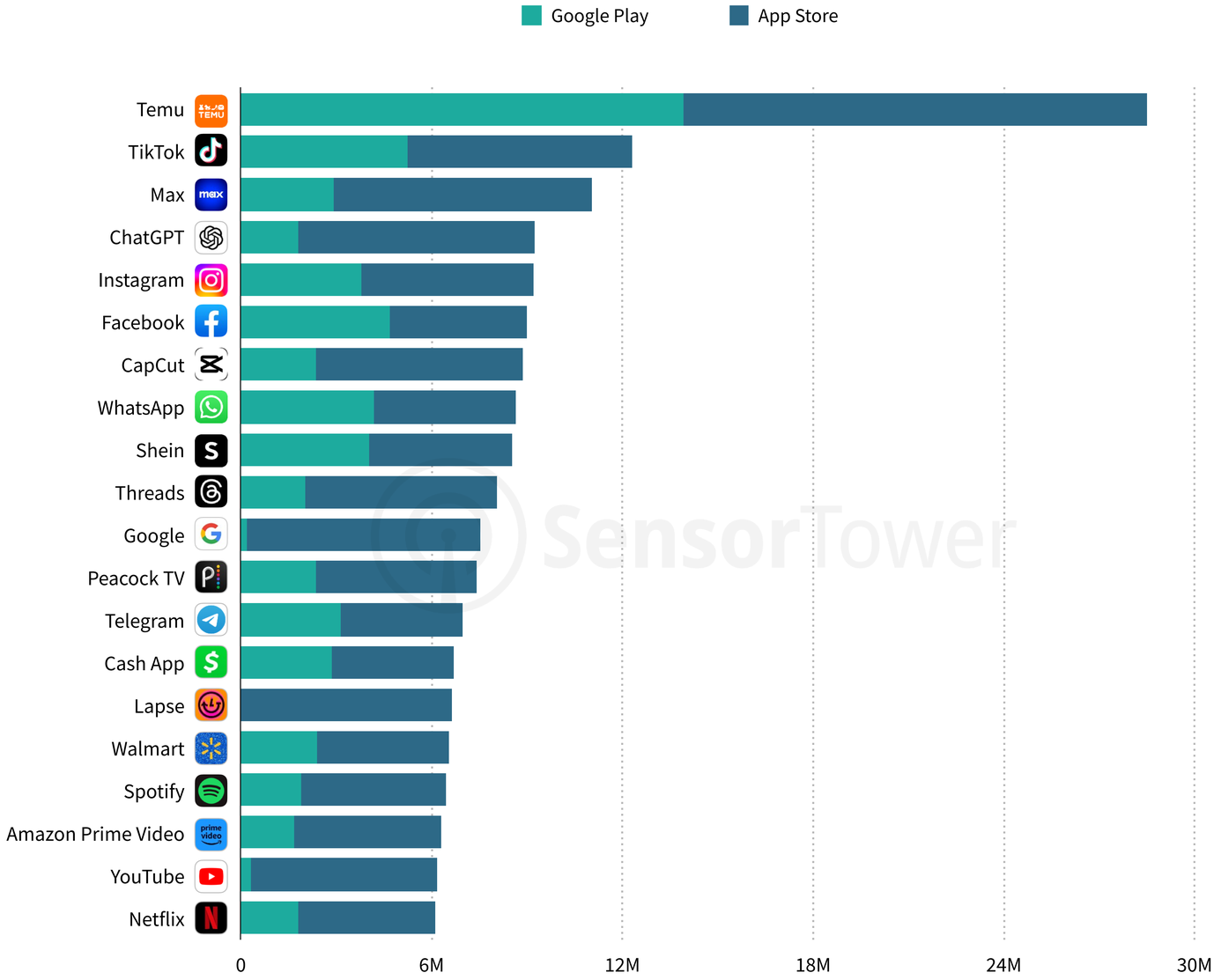
Top Apps by U.S. Downloads

Temu retained its leading position in the United States in Q4 2023, a record it has held since the first quarter of 2023, when it overtook TikTok to become the No. 1 app by downloads. Temu was the only shopping app in the top 20 ranking, alongside Shein, which climbed 14 positions in Q4 2023 YoY and Walmart (up 1 position YoY). Notably, Shein's increasing popularity in the US coincided with a record increase in digital ad investments, with its US ad spend surging by 120% YoY in Q4 2023.

ChatGPT also rose in the rankings, climbing 9 positions QoQ to become the fourth most downloaded app in the US and the only advanced conversational AI app among the top 20 most downloaded in the country. ChatGPT's popularity saw a significant surge in the week of November 27, 2023, coinciding with the media coverage surrounding the 1-year anniversary of its launch.

In the mobile TV streaming space, Max secured the third spot, retaining its position within the top three for the third quarter this year, following its rebranding in May 2023. Peacock TV emerged as the second most-downloaded TV streaming app in the US in Q4 2023. However, the app's rank at No. 12 represented a significant decline from its peak at No. 4 in the same quarter the previous year. The downturn in Peacock TV's ranking mirrors a broader trend within the streaming app industry, where several platforms have experienced shifts in their positions. Notably, Disney did not make it into the top 20 in Q4 2023, falling from its No. 12 spot in Q4 2022, while Netflix dropped to No. 20 in the past quarter from No. 15 in 2022.

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Overall - Europe

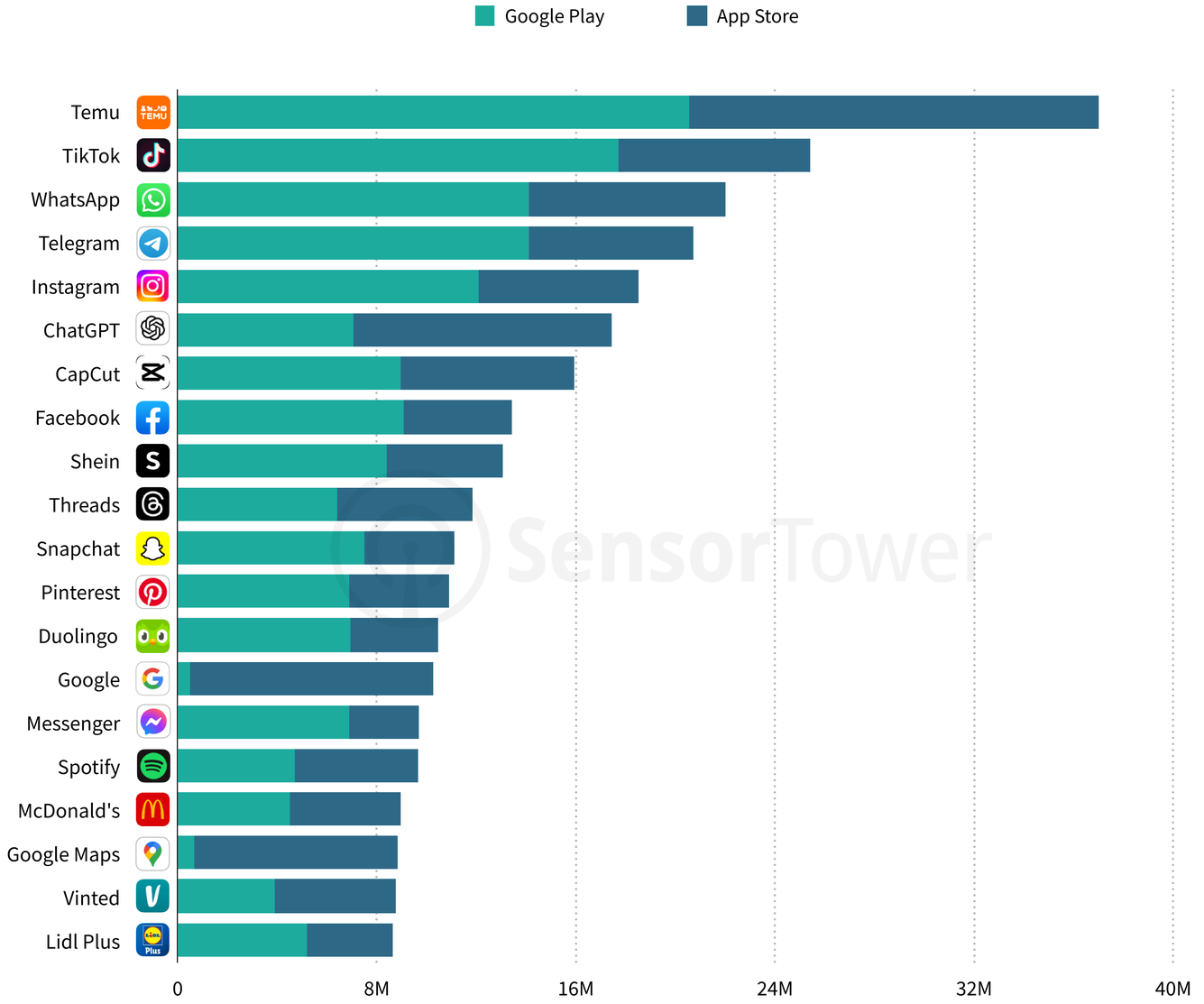
Top Apps by European Downloads

Temu maintained its position as Europe's leading app for the third consecutive quarter in Q4 2023, outpacing TikTok, WhatsApp, and Telegram. It was the most installed app across major European markets, with the exception of Russia, where the online retail app Wildberries claimed the top spot, and Turkey, where TikTok secured the number one position for the fourth consecutive quarter.

In Q4 2023, Duolingo experienced a significant rise in its download rankings, climbing 11 positions YoY to become the 13th most downloaded app across Europe. This surge in popularity coincided with the addition of music and math courses to its flagship language learning app during Q4 2023. Notably, the app's popularity increased substantially in Russia and Germany, making them two of Duolingo's fastest-growing European markets YoY.

In an indication that the cost of living may be continuing to impact Europeans despite a slowdown in inflation, Lidl Plus entered the top 20 most downloaded apps for the first time ever, marking the first instance since at least 2019 that a grocery discounter made it into the top rankings chart in Europe. Notably, discounters and supermarket reward apps were also among the top 10 in countries like Germany, the UK, and Italy in Q4 2023. In Germany, where GDP fell by 0.1% in the third quarter of 2023, the fourth quarter of 2023 marked the first time since the last quarter of 2020 that a grocery discounter was among the top 5 most downloaded apps.

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Overall - Asia

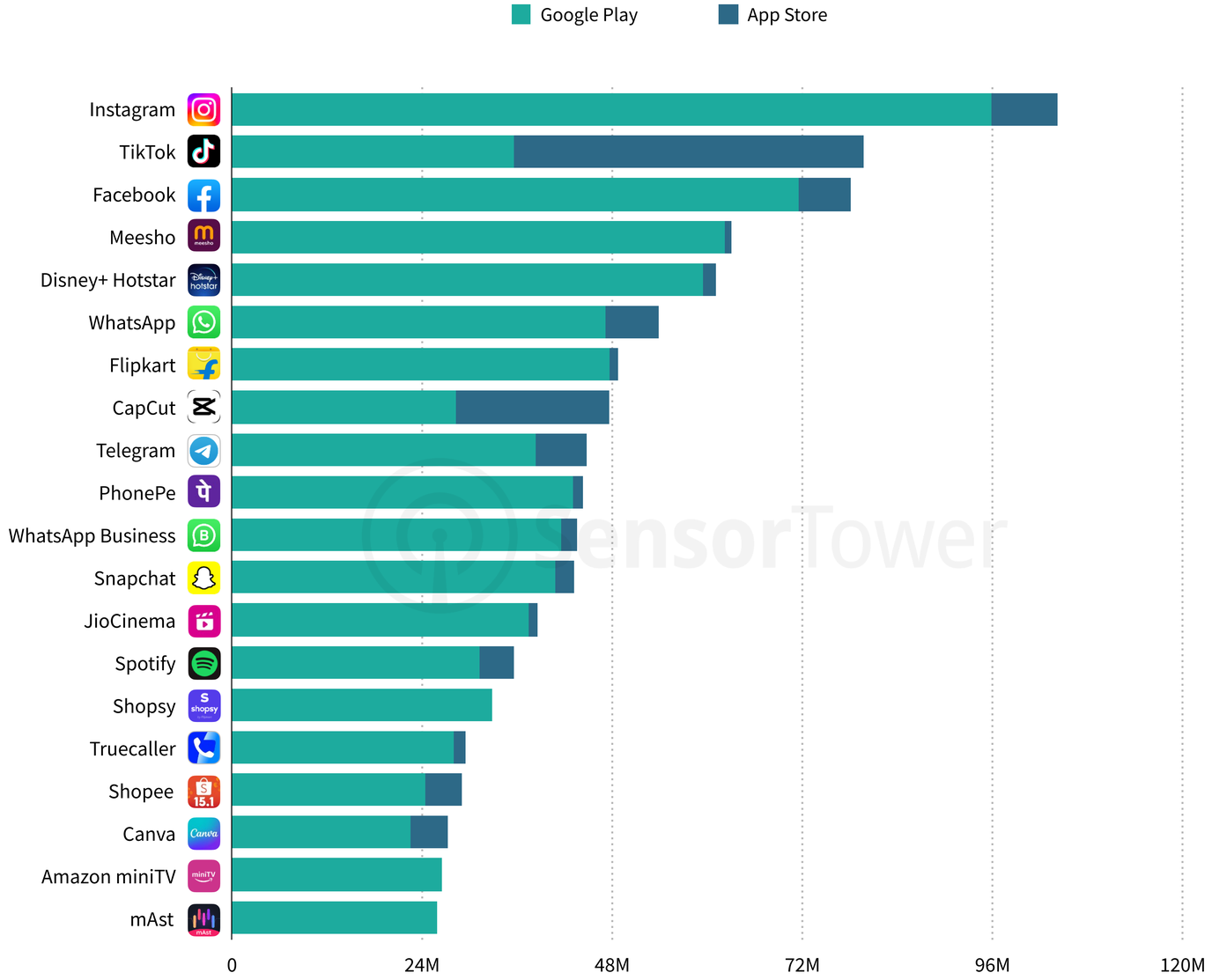
Top Apps by Asia Downloads

Instagram remained the most downloaded app overall in Asia in Q4 2023, a milestone it has continuously held since Q4 2022. Despite the app's success, for the first time since Q4 2021, its publisher Meta lost its top two spot dominance, with TikTok rising to the No. 2 position, pushing Facebook to No. 3. TikTok's rise in the rankings has been driven by the app's increasing popularity in China (where it is known as Douyin). TikTok's downloads in the country increased by more than 80% in Q4 2023 YoY, likely boosted by the app's expansion into e-commerce and food delivery services in China.

India-based shopping apps also climbed the Asia download ranking chart in Q4 2023, likely driven by Diwali and online shopping events such as Flipkart's 'Big Billion Days', which was held in October. At position No. 4, Meesho became the most downloaded shopping app in Asia during the quarter, climbing 7 positions QoQ, with new downloads driven by users in India, the app's primary market. Similarly, Walmart-backed Flipkart ascended 7 positions QoQ to position No. 7

The ICC Men's Cricket World Cup in October, hosted by India, and the Diwali holidays might have also boosted the popularity of TV streaming apps in Q4 2023. Disney Hotstar, exclusive to India, emerged as the fifth most downloaded app in Asia in the quarter, recording a 150% YoY increase in downloads. This significant growth in new downloads can be partly attributed to the platform's ability to stream certain ICC World Cup matches, drawing substantial viewer interest, despite losing the rights to stream playoff and regular season matches for the year 2023. Amazon miniTV, which launched in India in Q3 2023, also made significant gains, becoming the 19th most downloaded app in Asia in the past quarter.

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Top Games
by Downloads in Q4 2023

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Overall - Worldwide

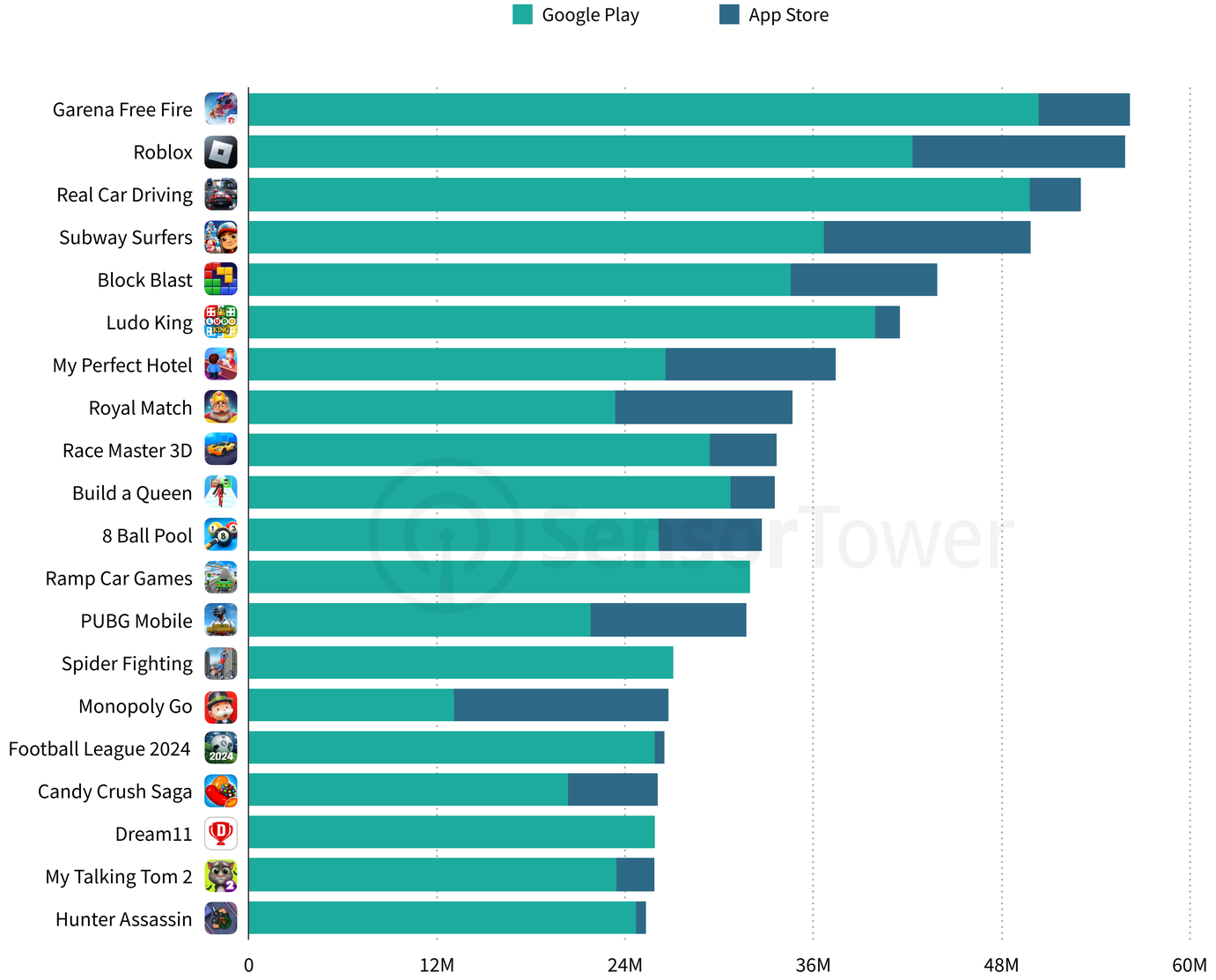
Top Games by Worldwide Downloads

Garena Free Fire retained its position as the top globally downloaded game in Q4 2023 with over 56 million new installs, up 14% YoY. The app's popularity during the quarter may be partly attributed to the excitement around the Free Fire World Series (FFWS), a key event in the Free Fire Esports roadmap. Roblox, closely following Free Fire, reached 56 million new installs, up 25% YoY. While Garena Free Fire was especially popular in India, accounting for 28% of its global downloads, Roblox found success in the Americas, with Brazil, the US, and Mexico collectively contributing over 30% of its new installs.

Among other top apps, puzzle app Block Blast rose 7 positions QoQ to become the fifth most downloaded game app, with a 47% QoQ increase in downloads, with India, the US, and Brazil, contributing to over one-third of its global new installs. Its rise in popularity coincided with an increase in the app's advertising presence, including on Snapchat in the US, where Block Blast ranked fifth among game apps in Share of Voice (SOV) for Q4 2023.

In Q4 2023, several new games, including Real Car Driving and Spider Fighting, entered the top 20 most downloaded game apps worldwide. Real Car Driving achieved the third place with 50m downloads, marking a 30 million increase QoQ. Spider Fighting also saw significant growth, with an increase of 23 million downloads QoQ, reaching 27 million. Both apps saw a considerable share of their global downloads coming from India, with the country accounting for 33% and 21% of their downloads, respectively.

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Overall - United States

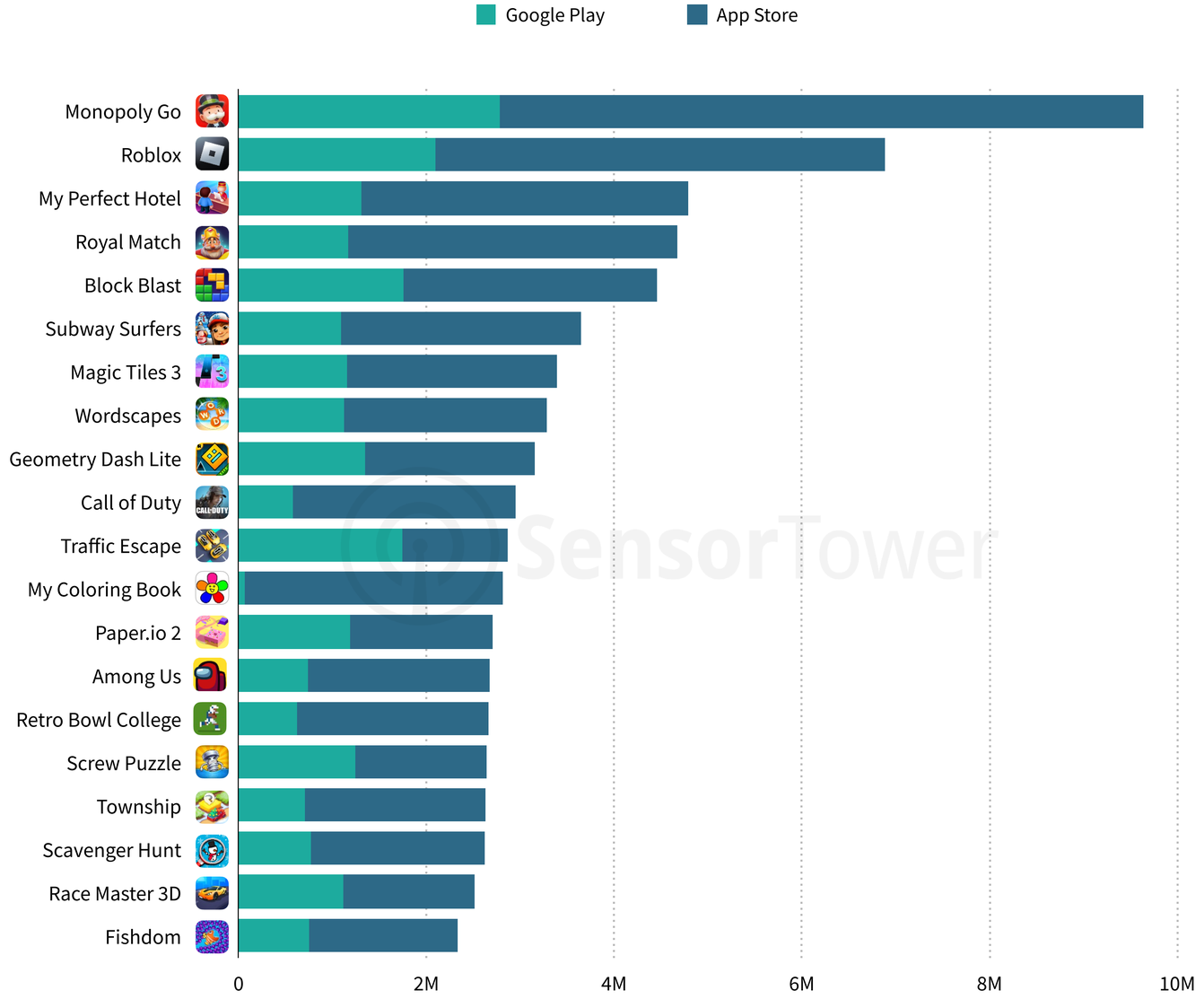
Top Games by U.S. Downloads

Monopoly Go, Roblox, and My Perfect Hotel held the top three spots as the most downloaded U.S. game apps in Q4 2023. Among them, My Perfect Hotel saw the largest QoQ growth, with a 3% increase in downloads, significantly outperforming Roblox (less than 1% increase) and Monopoly Go (which experienced a 30% QoQ decrease).

My Coloring Books and Screw Puzzle were the fastest-growing game apps in the U.S. during Q4 2023, each seeing an increase of over 2.5 million downloads compared to the previous quarter. Streaming giant Netflix continued to expand its presence in the mobile game space with its launch of Take Two-licensed GTA titles in December 2023. GTA San Andreas saw roughly 2.2 million downloads in December 2023, becoming Netflix's most downloaded game in the country during Q4 2023.

Netflix's expansion into the gaming space, especially with high-profile titles like 'GTA San Andreas', signifies a notable shift in the entertainment industry. This move blurs the lines between traditional streaming content and interactive gaming, pointing to a future where entertainment platforms may offer more integrated experiences. This integration isn't just limited to Netflix's venture into interactive gaming but is also reflected in platforms like TikTok, which is positioning itself as a game launchpad and a hub for streaming game content.

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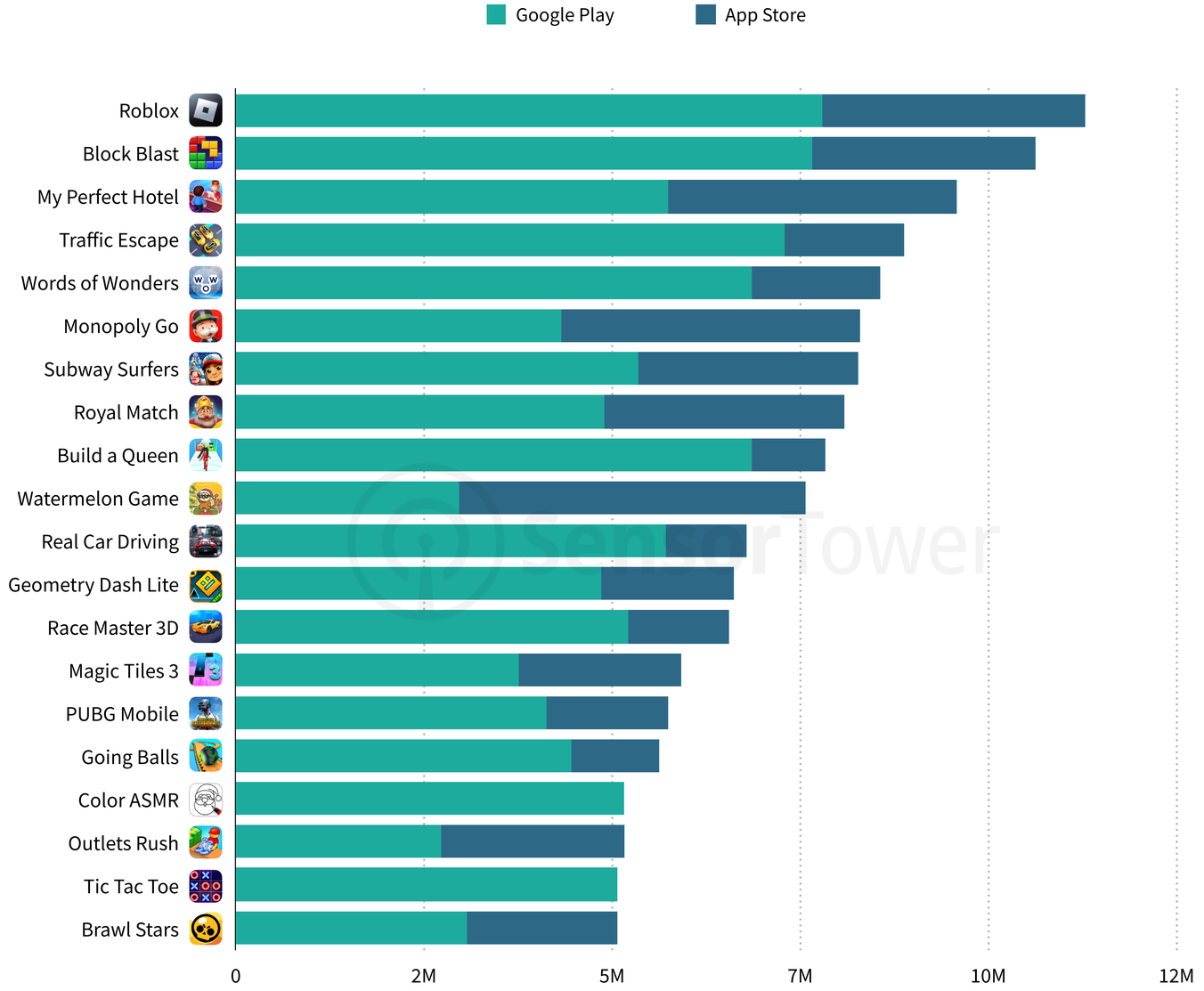
Overall - Europe

Top Games by European Downloads

In Q4 2023, Roblox led the download rankings in Europe with nearly 11 million new installs, experiencing a 9% YoY increase. Among European countries, Russia and Turkey showed the strongest adoption of Roblox, accounting for 40% of its total downloads in Europe. The Hungry Studio title Block Blast ranked as the second most downloaded game app, with installs surging by 547% YoY to over 10 million.

Traffic Escape by Fomo Games, which took the fourth position in the download ranking chart, was the fastest-growing game in Europe by absolute downloads for Q4 2023. It added 7.8 million new installs QoQ in Q4 2023, with Germany and the UK accounting for over 25% of the app's European installs. Notably, during the same quarter, in the UK, Traffic Escape ranked among the top 10 largest advertisers by Share of Voice (SOV) on AppLovin among puzzle game apps.

Several new games entered the top 20 most downloaded game apps ranking in Europe. Build a Queen climbed 12 positions QoQ, reaching No. 9, while Watermelon Game, launching in the same quarter, achieved the highest ranking among new games, reaching No. 10. The puzzle app was especially popular in France, which accounted for over one-third of its European downloads during the quarter.



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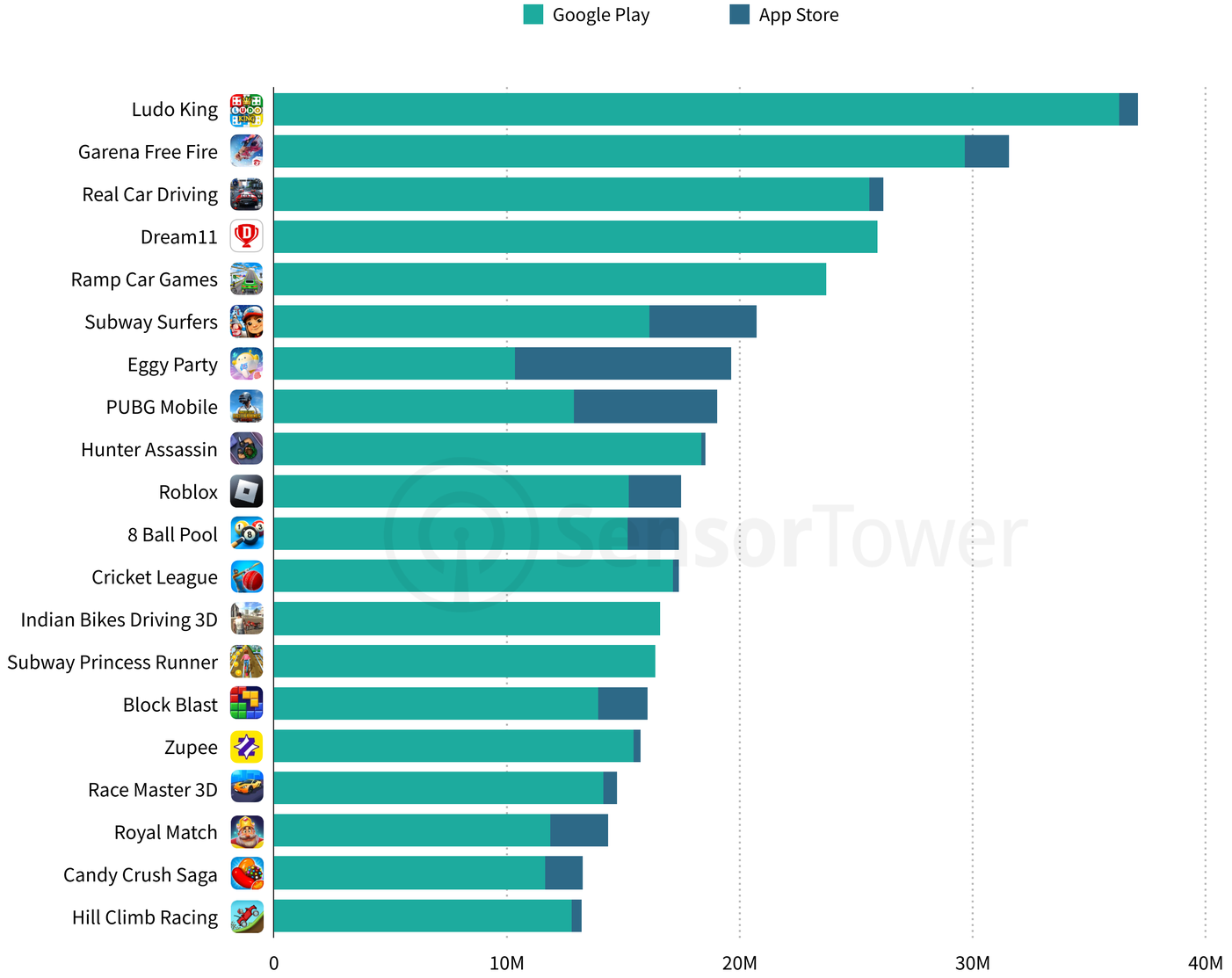
Overall - Asia

Top Games by Asia Downloads

Ludo King retained its position as the top game in Asia for the sixth consecutive quarter, with its downloads in Q4 2023 increasing by 4% YoY to 37 million. Asia was the game's largest market globally, contributing over 90% of its total downloads in Q4 2023. Within Asia, India was a significant contributor, accounting for the majority of Ludo King's first-time installs in the quarter, totaling over 32 million downloads.

Garena Free Fire secured the second spot in terms of downloads across Asia, with a 23% YoY increase to over 30 million. Its user base was more geographically diverse compared to Ludo King. Although India still accounted for the majority of its downloads in Asia. Indonesia and Vietnam emerged as significant markets, contributing to 17% and 12% of the game's downloads in Asia, respectively.

In Q4 2023, Asia led the global gaming industry with 5.3 billion downloads (down 10% YoY), surpassing North America and Europe. Asia also led in gaming revenue, amassing $9.2 billion in the quarter, down 4% YoY. China's latest clampdown on in-game spending and playtime could further dampen Asian gaming revenue growth in 2024. The regulatory change might be especially significant for top-grossing game apps with significant presence in China, including titles such as Honor of Kings, Genshin Impact, and PUBG Mobile.



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Top Apps & Games by Stickiness in Q4 2023

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Overall - Worldwide

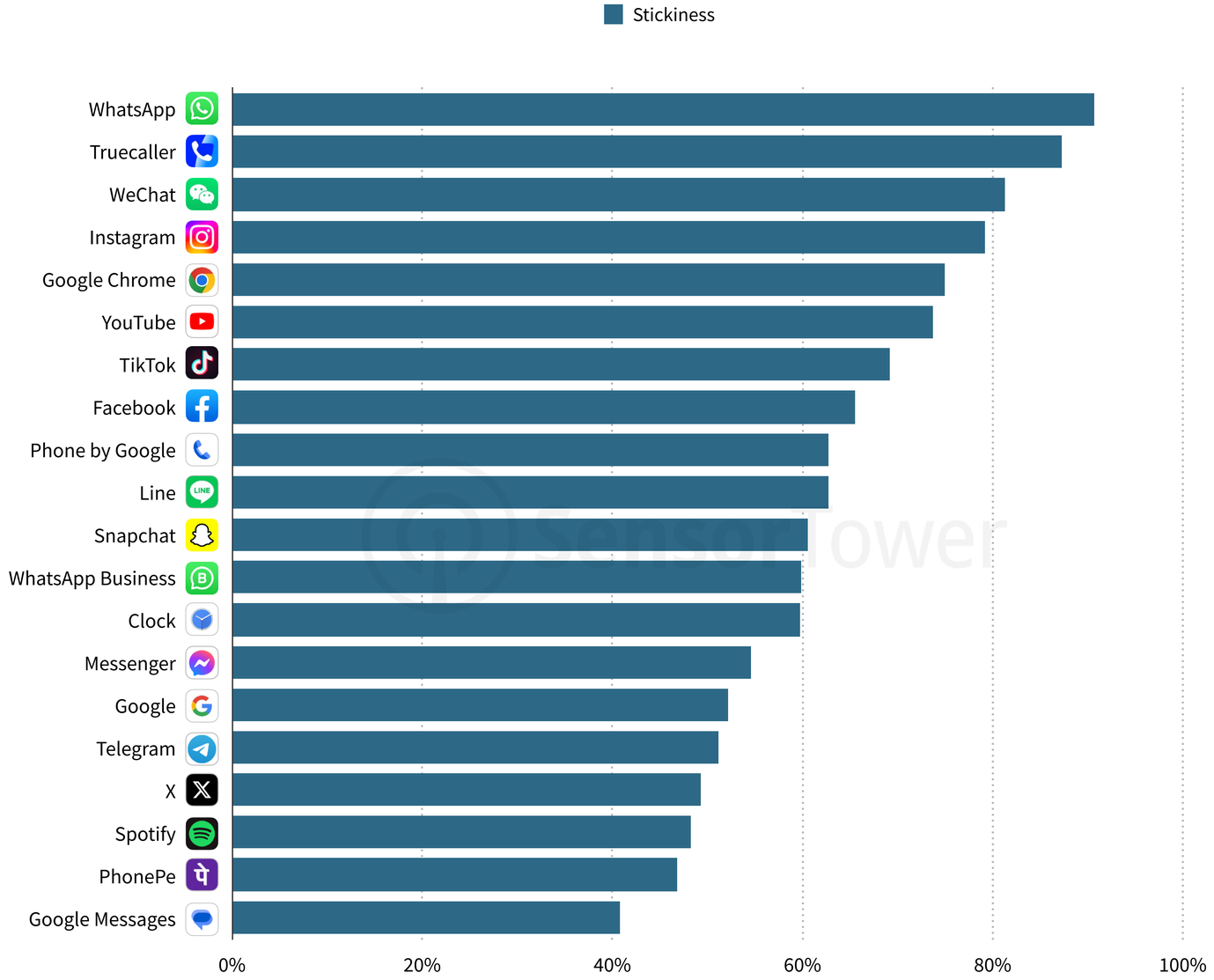
Top Apps by Stickiness Worldwide

In Q4 2023, Google and Meta emerged as leaders in global app 'stickiness,' a new metric tracked by Sensor Tower in its quarterly Data Digests which measures the percentage of MAUs engaging with an app daily (DAU/MAU). Collectively, these two publishers accounted for 11 out of the top 20 most sticky apps worldwide. Google's contribution included six apps, such as Chrome and YouTube, while Meta had five, including WhatsApp and Instagram.

Among the apps with the largest Monthly Active Users (MAU) in Q4 2023, WhatsApp was globally the stickiest, with 91% of its users returning daily. This high level of stickiness isn't surprising, as users return to these apps with a high degree of frequency in order to remain plugged in within their social space.

Notably, even though they didn't feature among the top 20 apps by global downloads, Truecaller and WeChat ranked as the second and third stickiest apps worldwide, respectively. Both had over 80% of their MAUs returning daily, with WeChat's user base predominantly in China.

In the video-led social media space, Instagram, YouTube, and TikTok were among the top 10 'stickiest' apps. Instagram had the highest percentage of MAUs engaging daily with the app (79%), while YouTube ratio stood at 74% and TikTok's at 69%.



Note Regarding 'Stickiness' Estimates
The ranking of apps by stickiness - measured as DAU/MAU ratio - is based on the top 50 apps by MAUs in Q4 2023. Apps with a higher percentages of monthly active users returning daily, but outside the top 50 by MAUs in the quarter are therefore not displayed.

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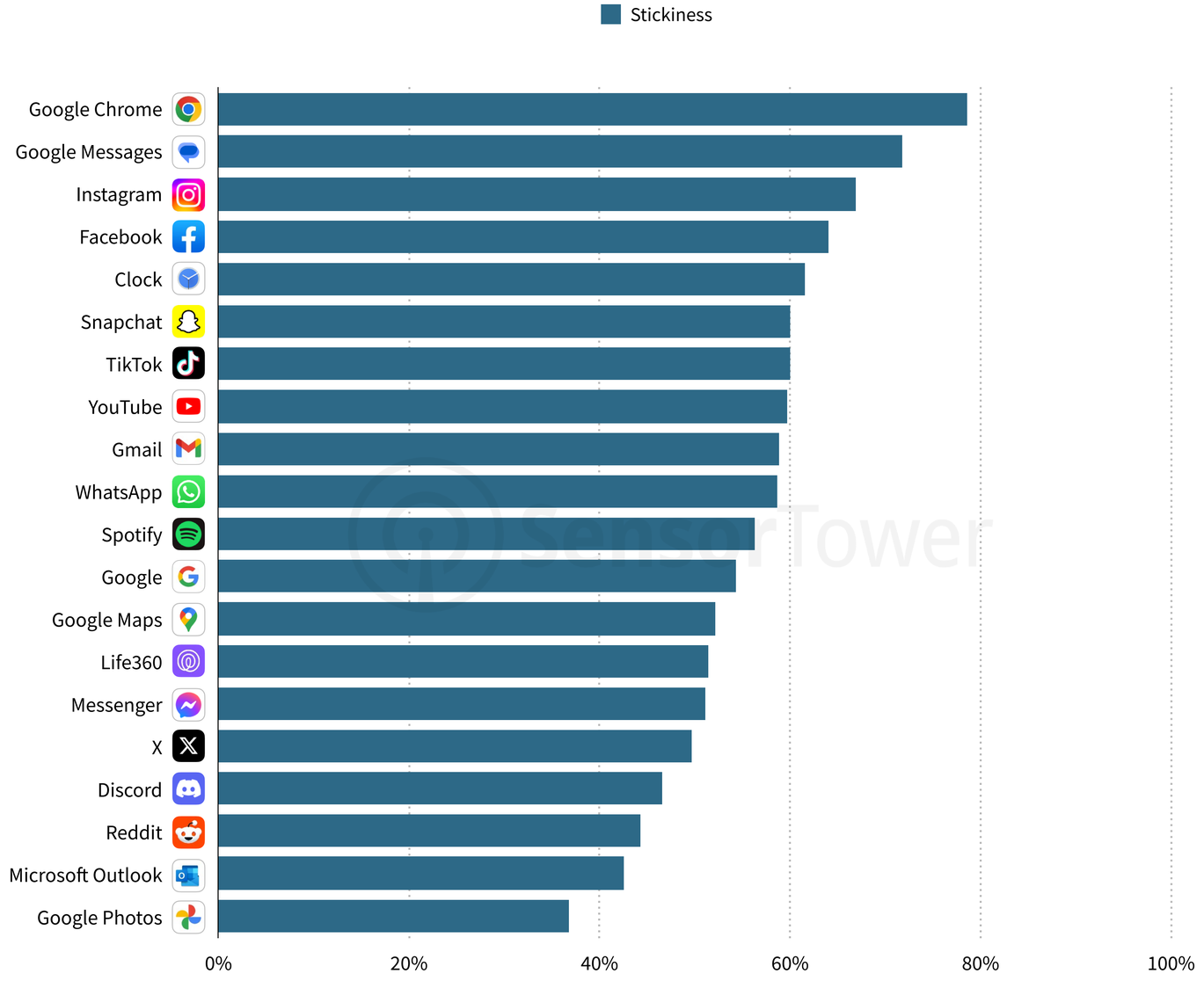
Overall - United States

Top Apps by Stickiness in the U.S.

In Q4 2023, among the top apps by MAUs in the US, Google Chrome was the stickiest, with publisher Google accounting for three of the top five most sticky apps during the quarter. This included Google Messages at position No. 2 and Clock at No. 5. The performance of Google Messages is noteworthy, as it dominated the mobile messaging space in terms of stickiness with 72% of its MAUs returning daily, compared to WhatsApp's 59%, despite the latter having significantly higher MAUs.

Meta led the social and entertainment app categories, with Instagram and Facebook each seeing about 65% of their MAUs engaging with these apps daily. This was slightly higher than Snapchat, TikTok, and YouTube, which all had around 60% stickiness. In the US, TikTok's 'stickiness' has remained stable in the past two years, underscoring a loyal core user base, despite facing increasing regulatory challenges and a marginal YoY dip (-4%) in its MAUs in 2023.

Despite a 17% YoY decline in its US MAUs in Q4 2023, X's core user base continued to be loyal, with only a 1 ppts decline in stickiness between Q4 2022 and Q4 2023. Its stickiness remained higher than that of competing apps like Discord and was significantly above new entrant Thread, which saw less than 20% of its MAUs engaging with the app daily during Q4 2023.



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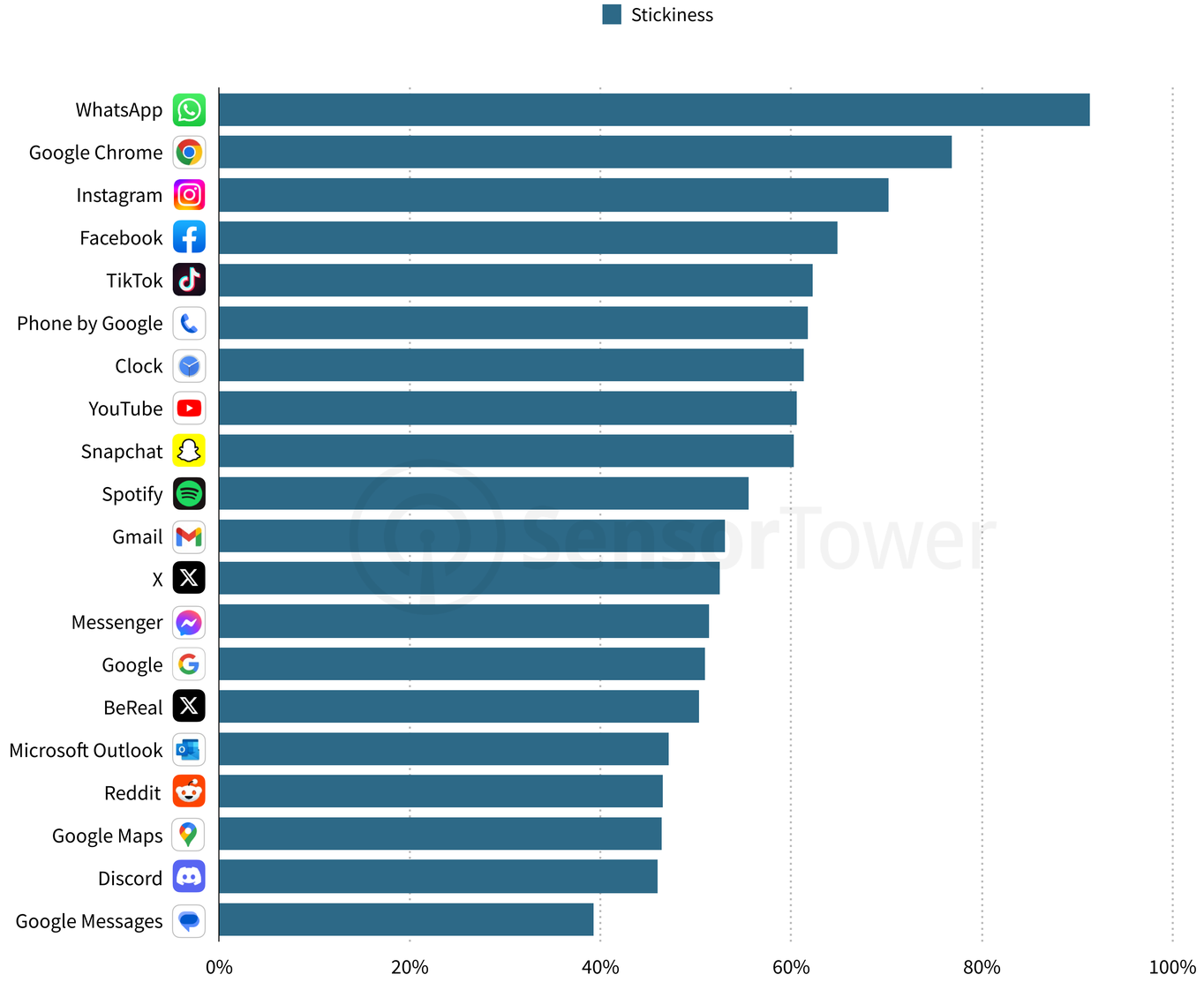
Overall - United Kingdom

Top Apps by Stickiness in the U.K.

WhatsApp, Google Chrome and Instagram were the top three stickiest apps in the UK in Q4 2023, with WhatsApp seeing 91% of its MAUs engaging with the app daily. As in the US, Instagram emerged as the stickiest social media app, with 70% of its MAUs returning daily to the app. This was similar to its rate in the US, but lower than Instagram's global stickiness, which stood at nearly 80% during the quarter.

Dubbed an "anti-Instagram" for its focus on unfiltered, real-life moments, French-based BeReal experienced a decline in both MAUs (-22%) and downloads (-87%) in the UK between the end of 2022 and Q4 2023. However, its user base has remained loyal to its unique daily photo-sharing feature, which requires users to post within a two-minute window each day. Despite this drop in popularity, BeReal's stickiness stood at 50%, surpassing Reddit (47%) and Discord (46%) in the UK.

Interestingly, Temu, despite being the most downloaded app in the UK for three consecutive quarters including Q4 2023, didn't rank among the top apps in terms of stickiness. Its DAU/MAU ratio stood at less than 20%, a figure that has been stable since its UK launch. Temu's proportion of MAUs engaging with the app on a daily basis also trailed behind other shopping apps like Amazon and Shein in Q4 2023. Temu's performance highlights that high download numbers and aggressive pricing strategies might not always translate into consistent user engagement.



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Overall - Japan

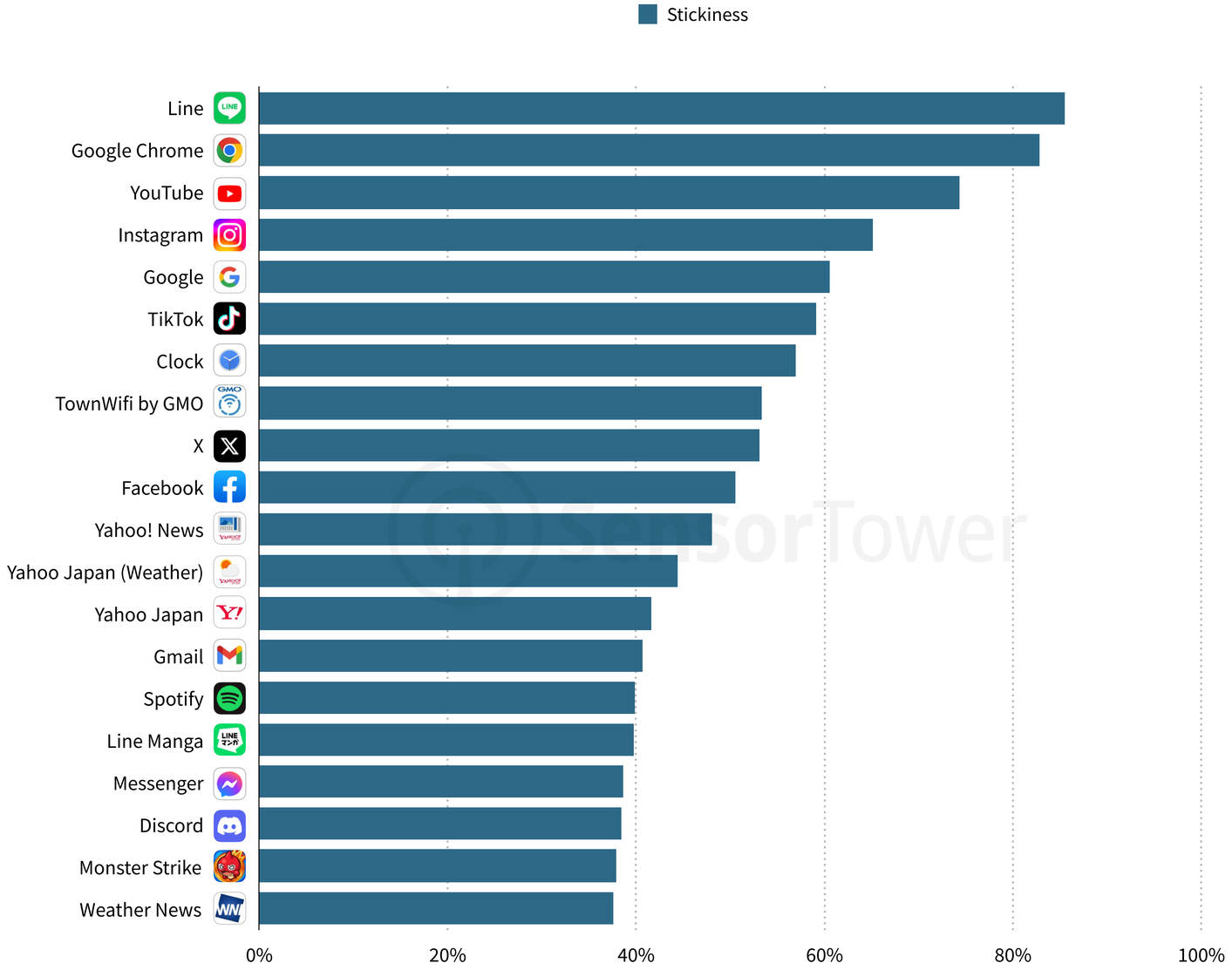
Top Apps by Stickiness in Japan

In Q4 2023, 'super app' Line exhibited the highest stickiness in Japan, with 85% of its MAUs engaging with the app on a daily basis. Publisher Google was prominent in Japan's stickiness rankings, with five apps in the top 20, including Google Chrome at second place. Among Google's apps, YouTube stood out in the social media/ entertainment space, showing a daily engagement rate of 74% in Japan, notably higher than in the UK (61%) and the US (60%).

Interestingly, Facebook exhibited signficantly lower stickiness in Japan compared to the US and UK in Q4 2023, with only 51% of its Japanese MAUs engaging daily, against 65% in the UK and 64% in the US. In Q4 2023, Facebook Japan had the highest average user age and the lowest share of users aged 18-24 among major global markets. This older demographic in Japan might contribute to lower daily engagement on Facebook, as older users might have different social media usage patterns. Additionally, the wide array of services offered by Line - the stickiest app in Japan - including messaging, banking, news, and social feeds, could be drawing users away from Facebook and other social media platforms.

Japan also stood out against the US and the UK for being the only country to have a game, two weather apps and a book (manga) reading app among its top 20 most sticky apps in Q4 2023. The popularity of the book category in Japan extends beyond just stickiness. Specifically, manga apps have consistently ranked among the top three grossing apps across Google Play and the Apple App Store in Japan each quarter since Q2 2021. In 2023, Japan had the highest revenue-per-download (RPD) ratio for the book category across the globe, at $23.61. This was significanty higher than countries such as the US ($4.32) and the UK ($3.10).

Note Regarding 'Stickiness' Estimates
The ranking of apps by stickiness - measured as DAU/MAU ratio - is based on the top 50 apps by MAUs in Q4 2023. Apps with a higher percentages of monthly active users returning daily, but outside the top 50 by MAUs in the quarter are therefore not displayed.



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Top Publishers
by Downloads in Q4 2023

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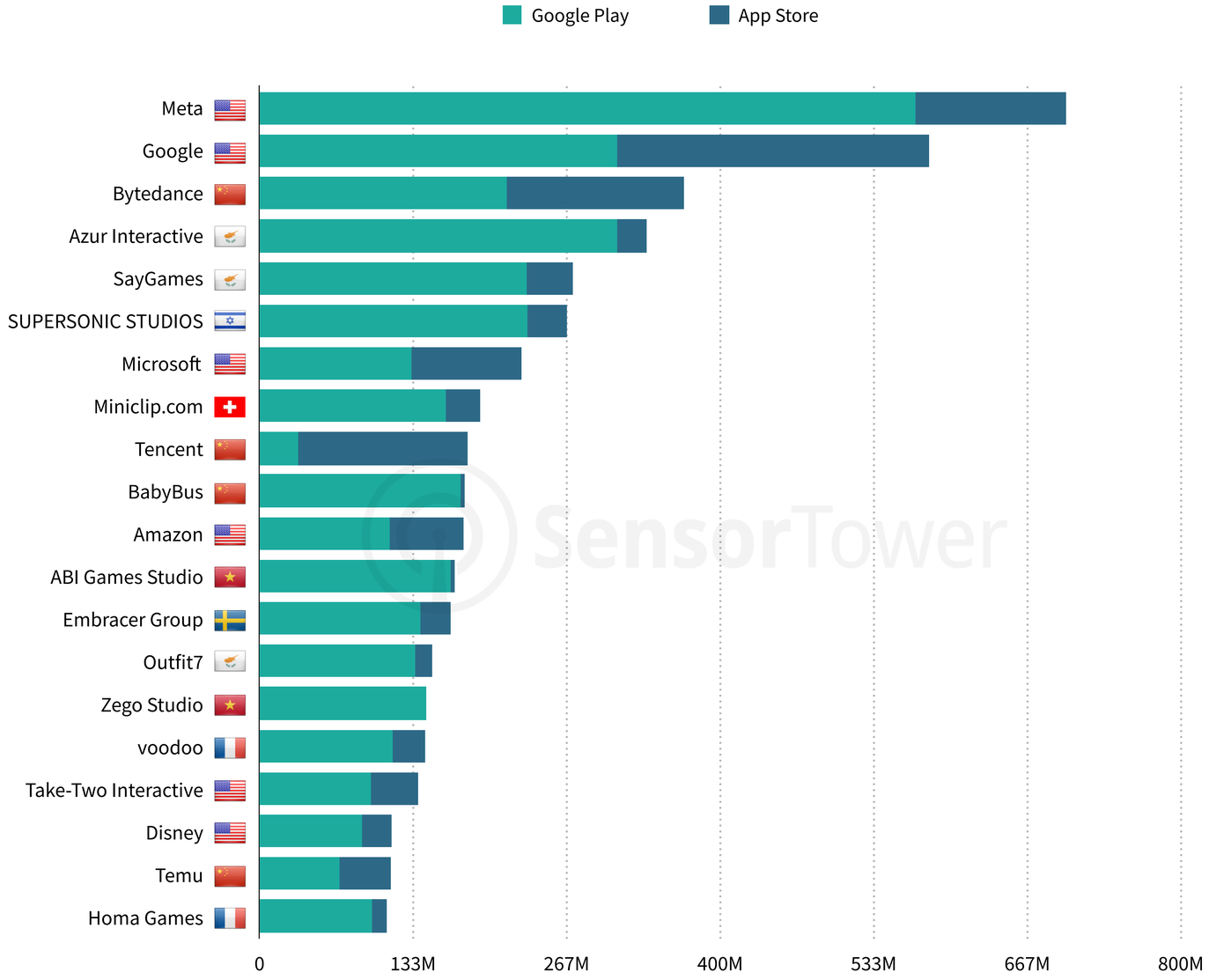
Overall - Worldwide

Top publishers by worldwide downloads

Meta (formerly known as Facebook) and Google continued to dominate the global mobile app market in Q4 2023, with Meta taking the No.1 position in worldwide downloads. Meta saw a 7% YoY increase in downloads, driven by the release of its new social app, Threads, in Q3 2023, and significant download growth for Instagram and WhatsApp within its largest markets by adoption, including India, Brazil, the US, and Mexico.

Google saw a small (less than 1%) increase in app downloads in Q4 2023 YoY. While downloads for mainstays like YouTube and the Google app declined slightly, YouTube Kids bucked the trend with a significant 38% YoY increase to 37 million downloads. Among the app's top 5 markets, India and Indonesia emerged as two of the fastest-growing by download growth in Q4 2023 YoY.

Quarterly, Amazon, Botanica (outside of the top 20 in Q4 2023), and SayGames emerged as the fastest-growing publishers by absolute download growth. Notably, SayGames' title 'My Perfect Hotel' was a standout, securing a spot among the top three most downloaded games in both the US and Europe.



Note Regarding Download Estimates
Our estimates include downloads for iPhone, iPad, and Google Play in Q4 2023.
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Android estimates do not include third-party stores.

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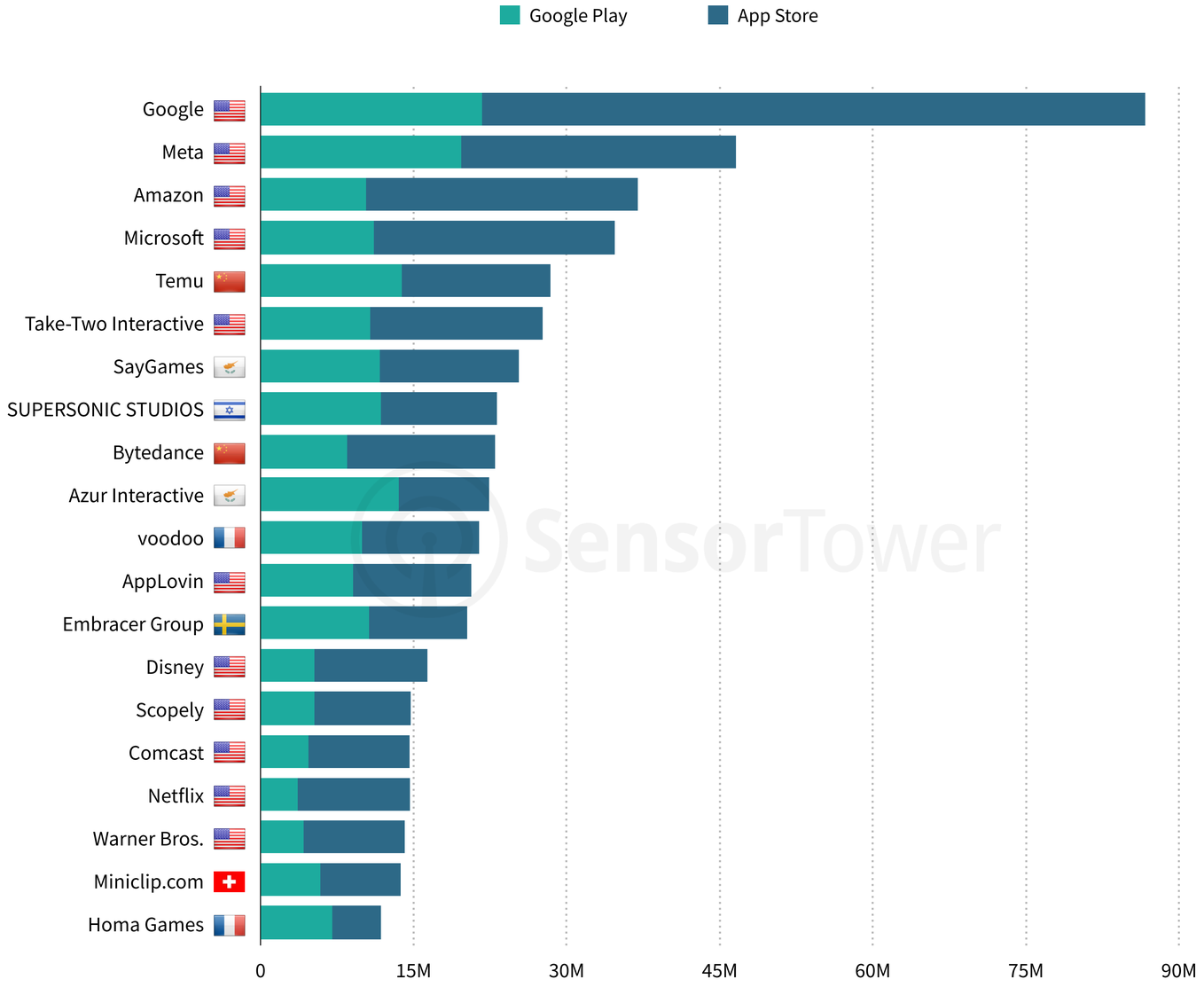
Overall - United States

Top publishers by U.S. downloads

Google has maintained its dominance in the US mobile market for 30 quarters, leading in downloads since overtaking Meta in Q3 2016. In Q4 2023, Google's downloads reached 86.7 million, down 1% QoQ and -3% YoY. Despite a drop in new installs for YouTube (-7% YoY in Q4 2023), Google Maps and Google Photos saw increases of 4% and 16%, respectively.

Meta, as the second-largest app publisher in the US for Q4 2023, experienced a more than 20% increase in YoY downloads, totaling 46.5 million. Despite Messenger's 17% decline in new installs, Instagram, WhatsApp, and Facebook all saw increases in downloads, with Instagram growing by 7% YoY. The overall growth for Meta was also bolstered by the launch of Threads, which accumulated 28 million downloads from its launch in July 2023 to year's end.

Among rising publishers, Temu notably climbed 12 positions from Q4 2022 to the end of 2023. This ascent was largely propelled by its eponymous shopping app, Temu, which consistently ranked among the top downloaded apps in the US throughout 2023. Netflix re-entered the top 20 for the first time since Q1 2019, driven by its newly released gaming titles, including GTA: San Andreas and GTA: Vice City.



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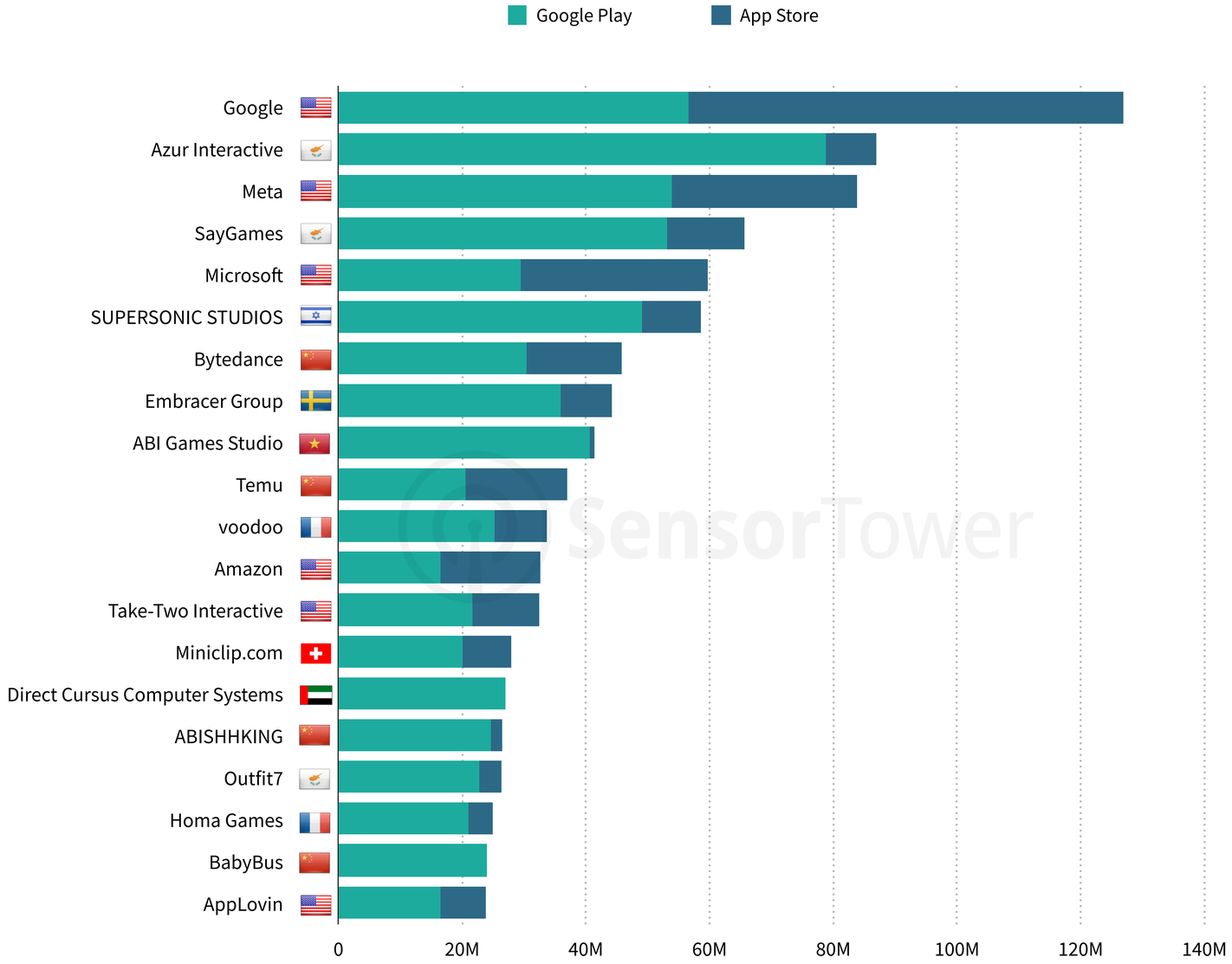
Overall - Europe

Top publishers by European downloads

Google continued to lead European downloads in Q4 2023, a position which it has held since Q3 2019 when it overtook game publisher Azur Interactive. Google saw over 120 million downloads in the quarter, up 2% YoY. Among its suite of apps, Gmail, Google Maps, and YouTube Kids were particularly strong performers, growing by 20%, 18% and 17% YoY, respectively.

Azur Interactive claimed the second spot in Q4 2023, overtaking Meta, driven by legacy titles such as Bottle Jump - contributing to over a million downloads in Q4 2023 YoY - as well as new 2023 releases, including Idle Racer and Fashion Queen. Azur Interactive and Microsoft, alongside Netflix - which was outside of the top 20 in Q4 2023 - were among the fastest growing top publishers in Europe, with Azur Interactive growing by 20% QoQ.

Mirroring trends in the US, publisher Temu has quickly scaled the European download rankings since the launch of its Shopping app across most European countries in Q2 2023. The Chinese-based app has enjoyed strong popularity in Europe, with the app the most downloaded each quarter since its launch in Q2 2023.



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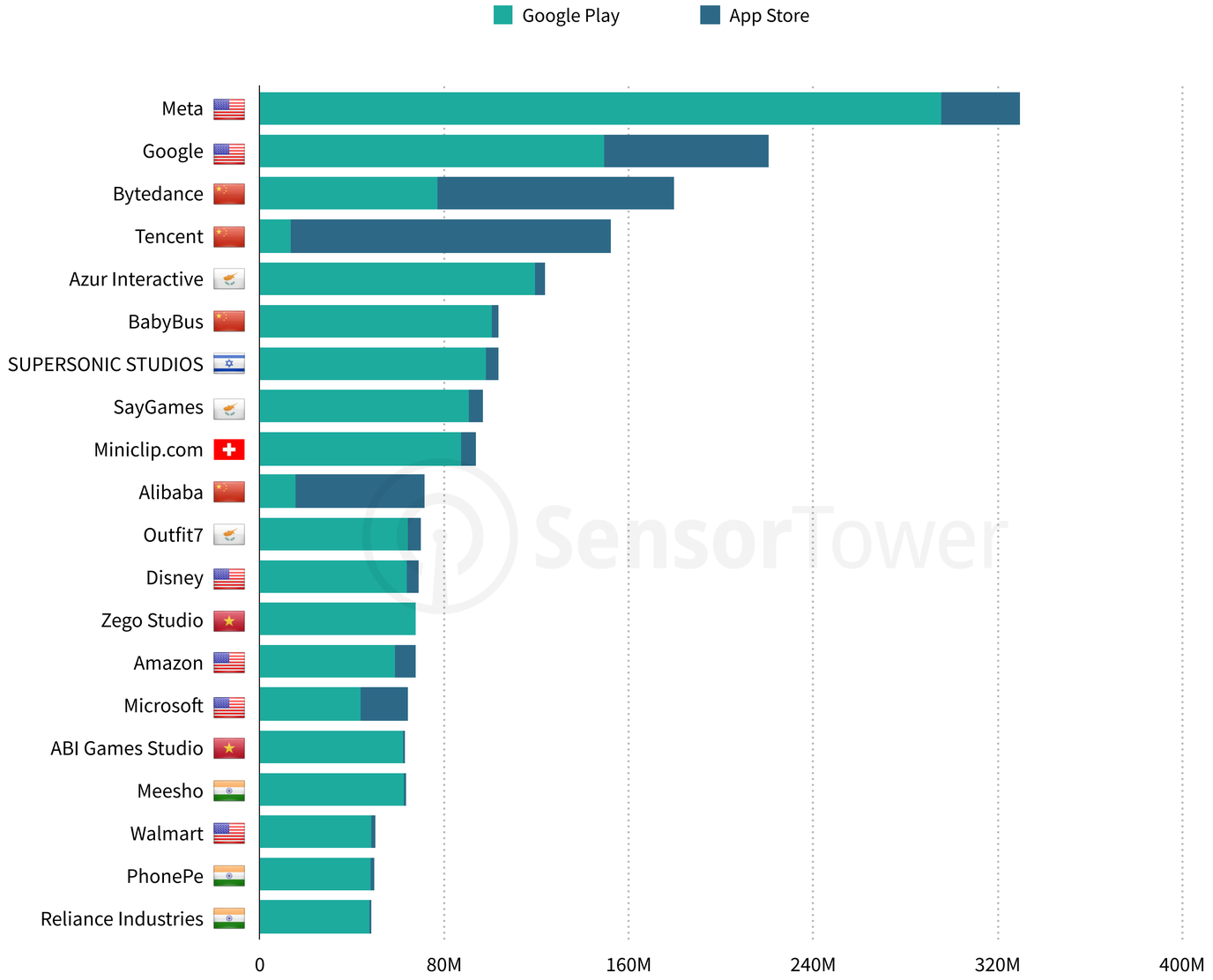
Overall - Asia

Top publishers by Asia downloads

Meta, Google, ByteDance, and Tencent have consistently held the top four positions in overall app downloads in Asia for eight consecutive quarters. Notably, Meta remains a dominant force in the region, recording 330 million downloads in Q4 2023. This figure was 1.5 times higher than Google's, which secured second place with 221 million downloads.

Meta was particularly popular in India (61% of its downloads in Asia during Q4 2023), where the popularity of Instagram has surged in recent quarters, following the ban of TikTok in the country. Conversely, Google's suite of apps displayed a more diverse geographical distribution, with 7% of its downloads in the quarter coming from Japan. With ByteDance facing restricted access in India—a country with a substantial young population, a key demographic for TikTok—China was ByteDance's largest market in Q4 2023. Its app Douyin, the Chinese counterpart of TikTok, experienced double-digit YoY growth in downloads in Q4 2023.

In terms of QoQ growth, Disney, Meesho, and Amazon led the pack in Asia. Their downloads increased by 66%, 37%, and 38%, respectively. This significant growth can be partly attributed to the Diwali festivities, which boosted the popularity of various apps. These include streaming services like Disney Hotstar and platforms under Amazon's umbrella, as well as shopping apps such as Meesho.



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Top Markets
by Downloads in Q4 2023

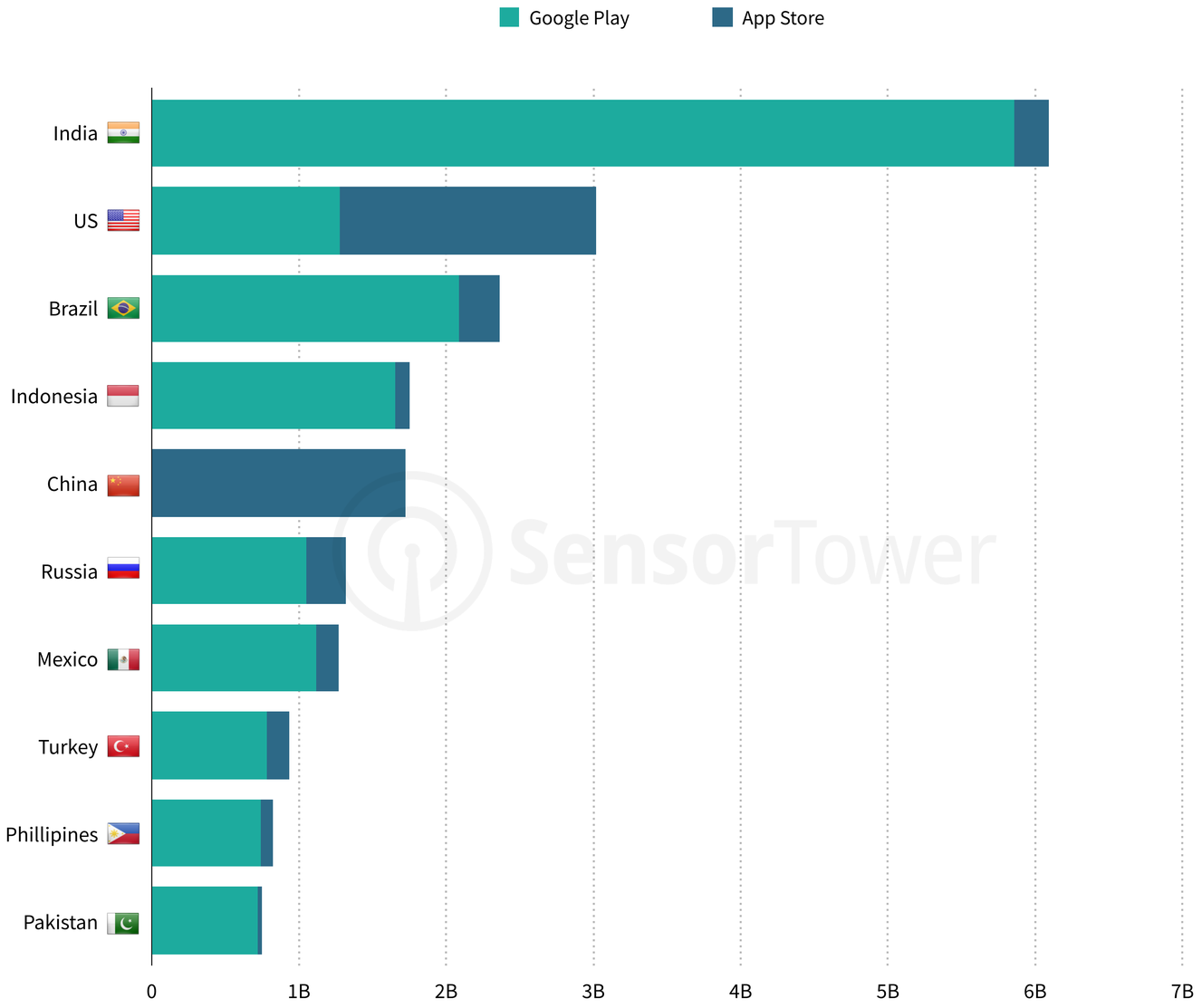
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Overall

Top market by downloads

In Q4 2023, India continued its dominance in the worldwide mobile app market, boasting 6.1 billion downloads across Google Play and the Apple App Store. The country's performance aligns with its recent demographic milestones. India has not only surpassed China as the most populous nation but also boasts the largest proportion of millennials and GenZs globally, with over 600 million people aged 18-35 — a massive user base for mobile apps. Following India, the United States held the second spot the past quarter, with 3 billion downloads, while Brazil secured the third position with 2.4 billion downloads.

Among the top global countries by downloads in Q4 2023, only China (only iOS estimated are available), Mexico, and the Philippines saw growth in downloads YoY during the quarter. As populations stabilize or decline in many regions worldwide, Africa is emerging as an increasingly important player in the global download market. Nigeria, Africa's most populous country, has significantly risen in the global download rankings. It climbed 5 positions in Q4 2023 YoY to No. 24, becoming the top country by download growth in Africa at 42%. Angola, another African nation, followed with a 17% YoY growth in downloads.



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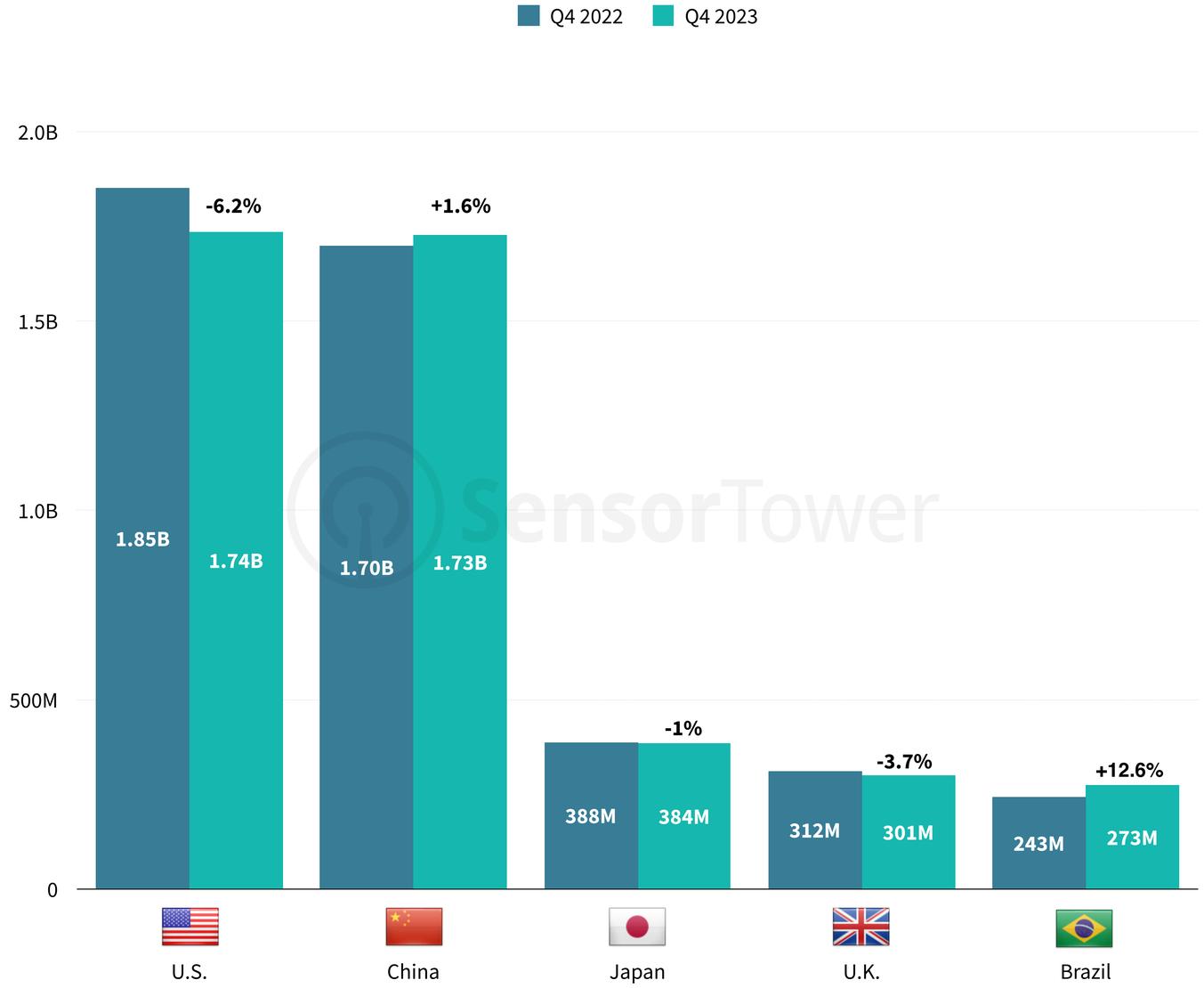
App Store

Top markets by Apple App Store downloads

The US and China remained the predominant markets for iOS downloads from the Apple App Store, collectively contributing to 42% of global downloads in Q4 2023. While US's iOS downloads decreased by 6.2% YoY, China's installs rose by 1.6%, bringing the country's total nearly on par with the US, at 1.74 billion — the smallest gap since Q1 2020. Japan, as Apple's third-largest market by downloads, had a notably smaller global share with 384 million downloads.

Although the US remains a significant market for Apple, the company is increasingly witnessing download growth in emerging markets. In Q4 2023, the countries leading growth in iOS downloads were China, India, Brazil, Mexico, and the Philippines, with China and India registering the highest absolute growth in downloads YoY. This trend aligns with Apple's strategic focus on emerging markets, as evidenced by their success in urban China, where Apple's phones ranked as the top four selling models in 2022.

In India, although the iOS market represented only 4% of the country's total app downloads in Q4 2023, iOS installs saw a substantial 18% YoY increase during the quarter. This increase could be attributed to a growing middle class — which in India grew by 17 ppts between 2004 and 2021 — and the potential perception of Apple's ecosystem as a status symbol in emerging markets, factors similarly observed in other emerging economies.



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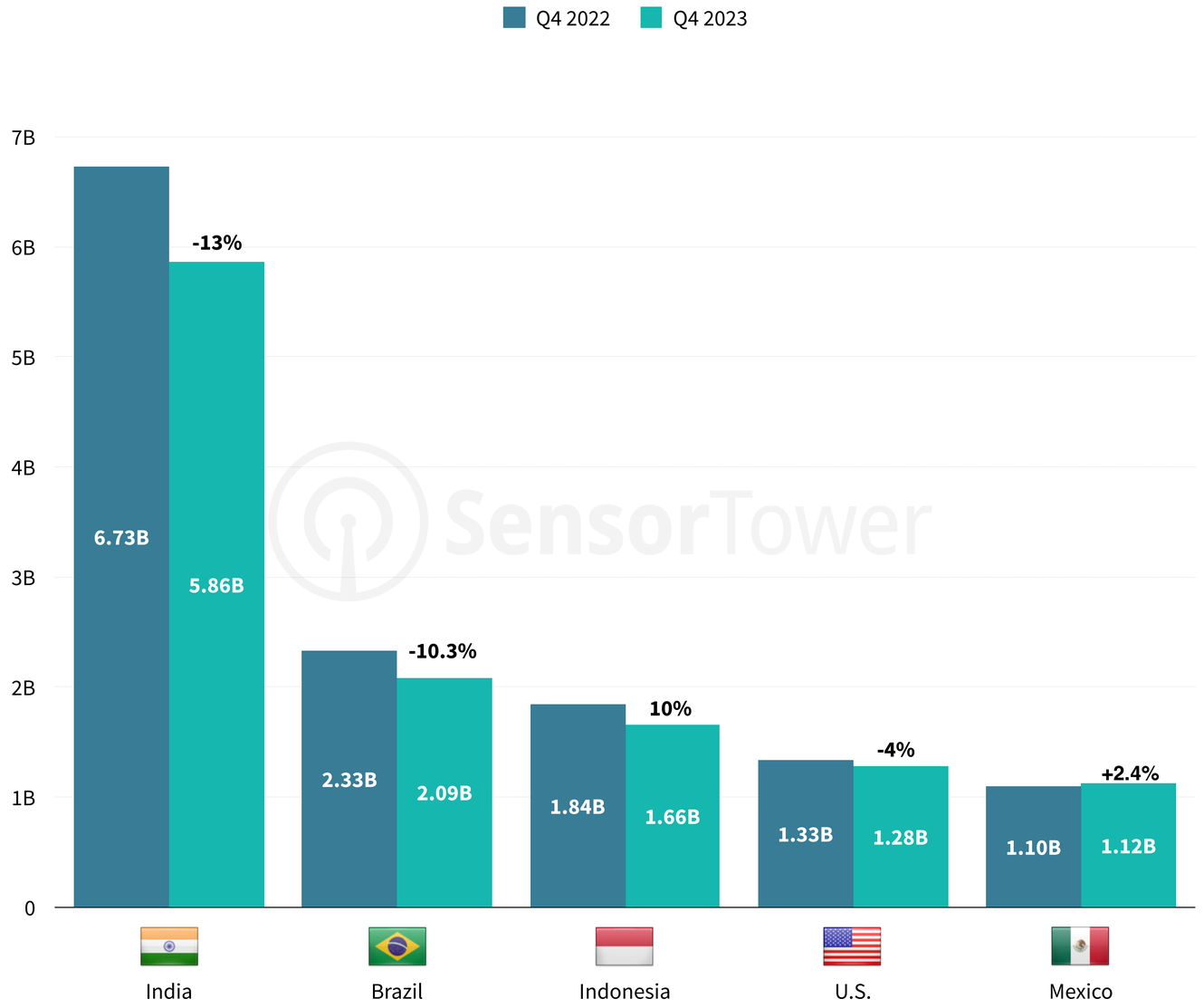
Google Play

Top markets by Google Play downloads

Despite a 13% YoY decrease in downloads, India remained the leader in Google play downloads globally in Q4 2023, with over 5.8 billion installs. Brazil took second place with 2.1 billion downloads, while Indonesia — Asia's third largest country by population, ranked No. 3 with 1.7 billion downloads.

Market saturation, a decline in smartphone shipments, a growing middle class with increased affordability for premium products like Apple's devices, and a cost of living crisis particularly affecting emerging countries, could all be contributing factors that help explain the extended mobile phone refresh cycles and the decrease in Google Play first-time installs in certain markets, including India.

In the final quarter of 2023, Finland emerged as the fastest-growing market globally in terms of Google Play installs, recording a 25% YoY growth. Nigeria, however, led in terms of absolute download increase, adding over 50 million Google Play downloads compared to the same period the previous year. Notably, Nigeria's smartphone penetration, currently at around 20% of the population, is projected to rise sharply. By 2025, it is expected that 140 million Nigerians, or 66% of the population, will be smartphone users.



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Usage Intelligence

Benchmark app usage, engagement, and demographics.



App Teardown

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



Consumer Intelligence

Access unfiltered mobile user engagement for financial analysis.

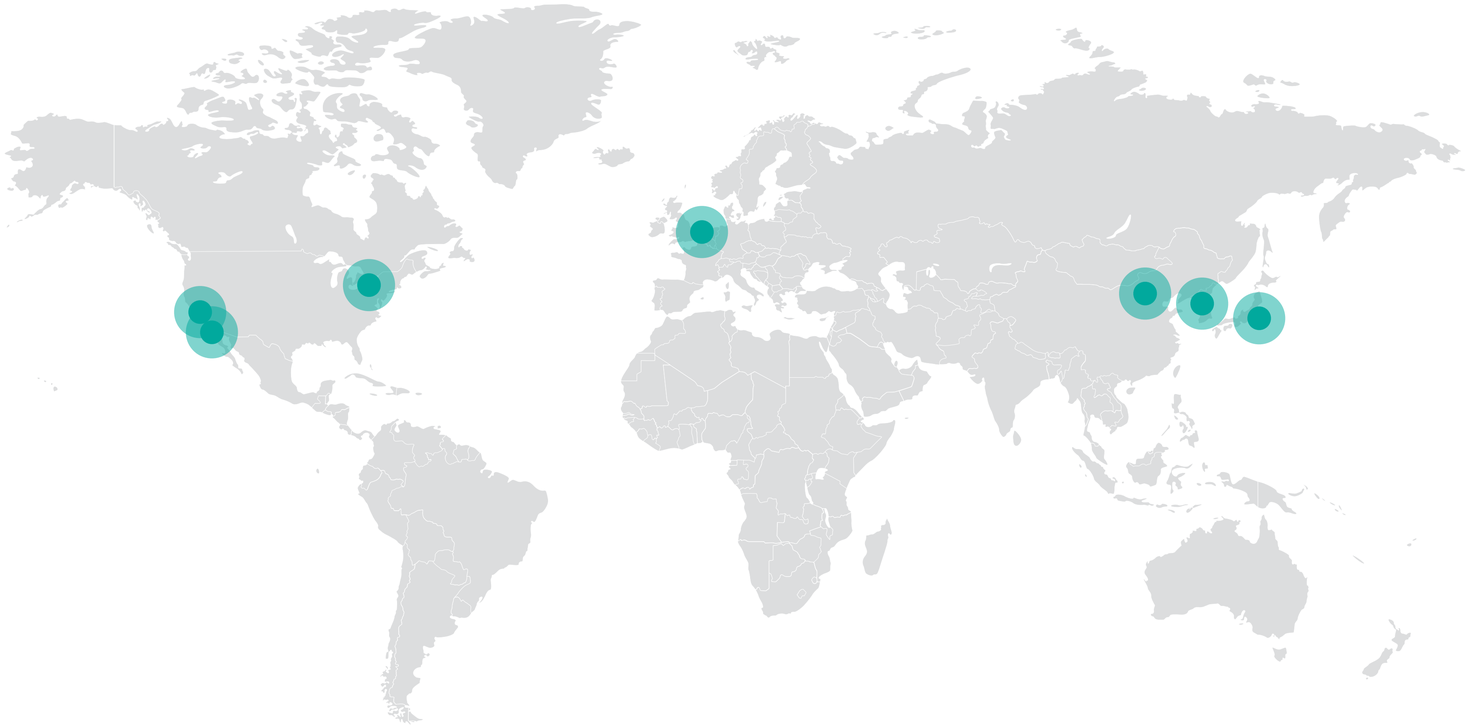
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