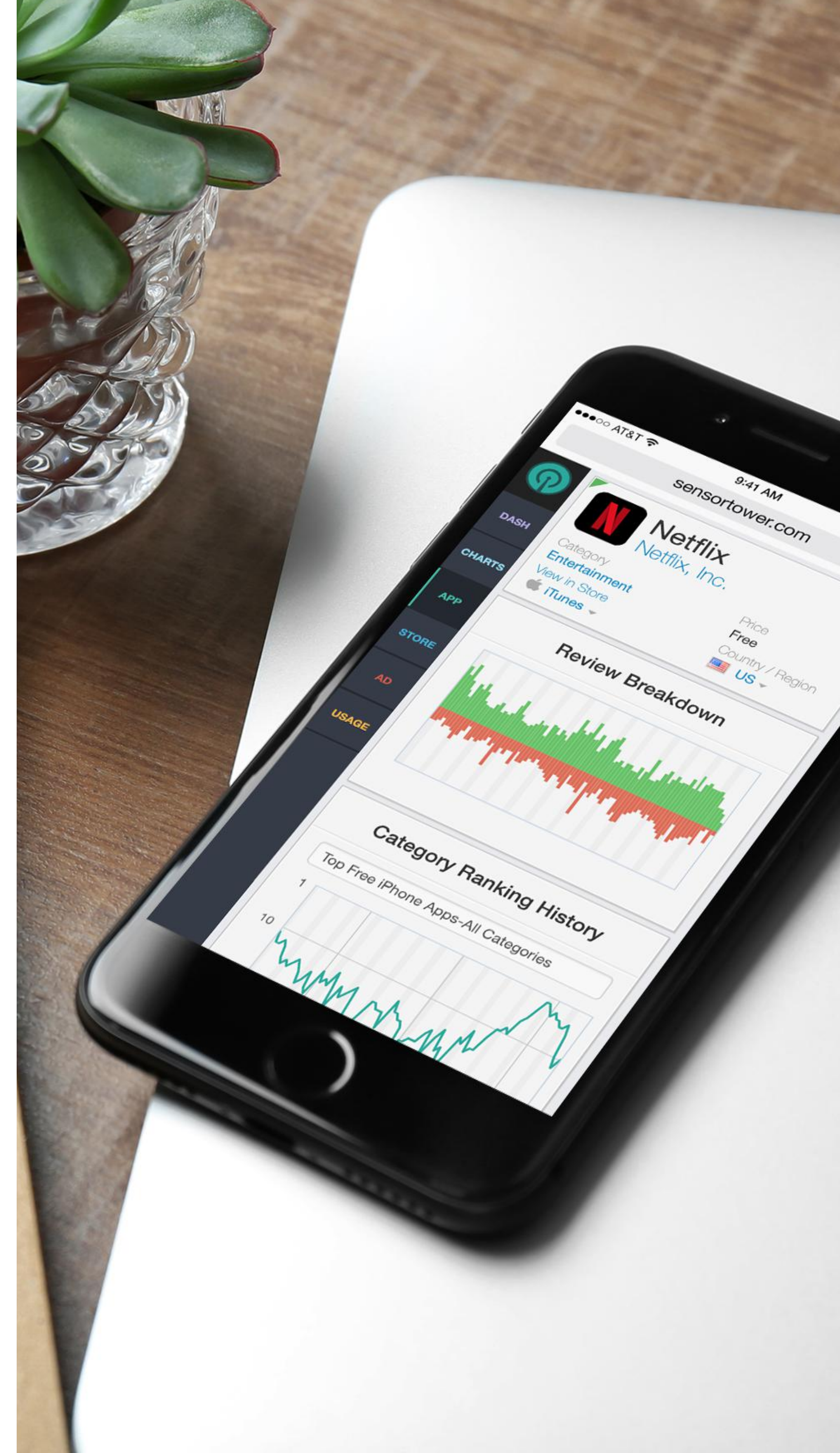
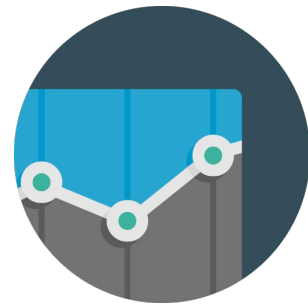


Q4 and Full Year 2018 Store Intelligence Data Digest





Worldwide app downloads totaled 27.4 billion in 4Q18, an 11.8% year-over-year increase. **App Store downloads increased 1.5% to 7.2B** while **Google Play grew 16% to 20.2B**.



Amazon's best December ever propelled it to the top five most downloaded apps in the U.S. in 4Q18, across App Store and Google Play. Its **Amazon Alexa** app also reached the top 20.



Netflix was the third most downloaded app in the U.S. in the quarter, only behind **Facebook's Messenger** and **ByteDance's TikTok**. The app was also the highest grossing non-game worldwide in 2018.



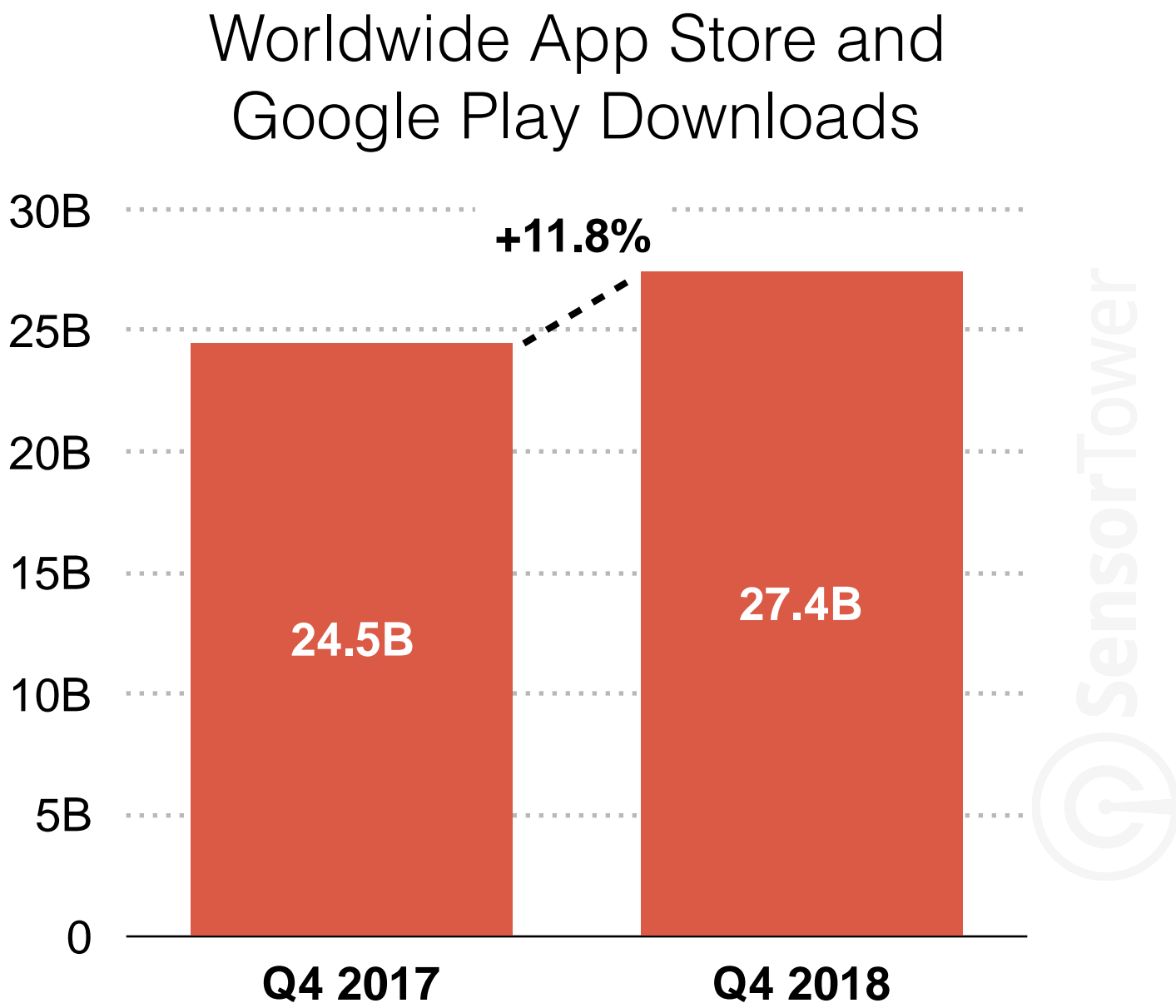
PUBG Mobile was the top downloaded App Store game worldwide in 4Q18. The game has topped the App Store charts each quarter since its launch in 1Q18.

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, 2018 through December 31, 2018.
- 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.

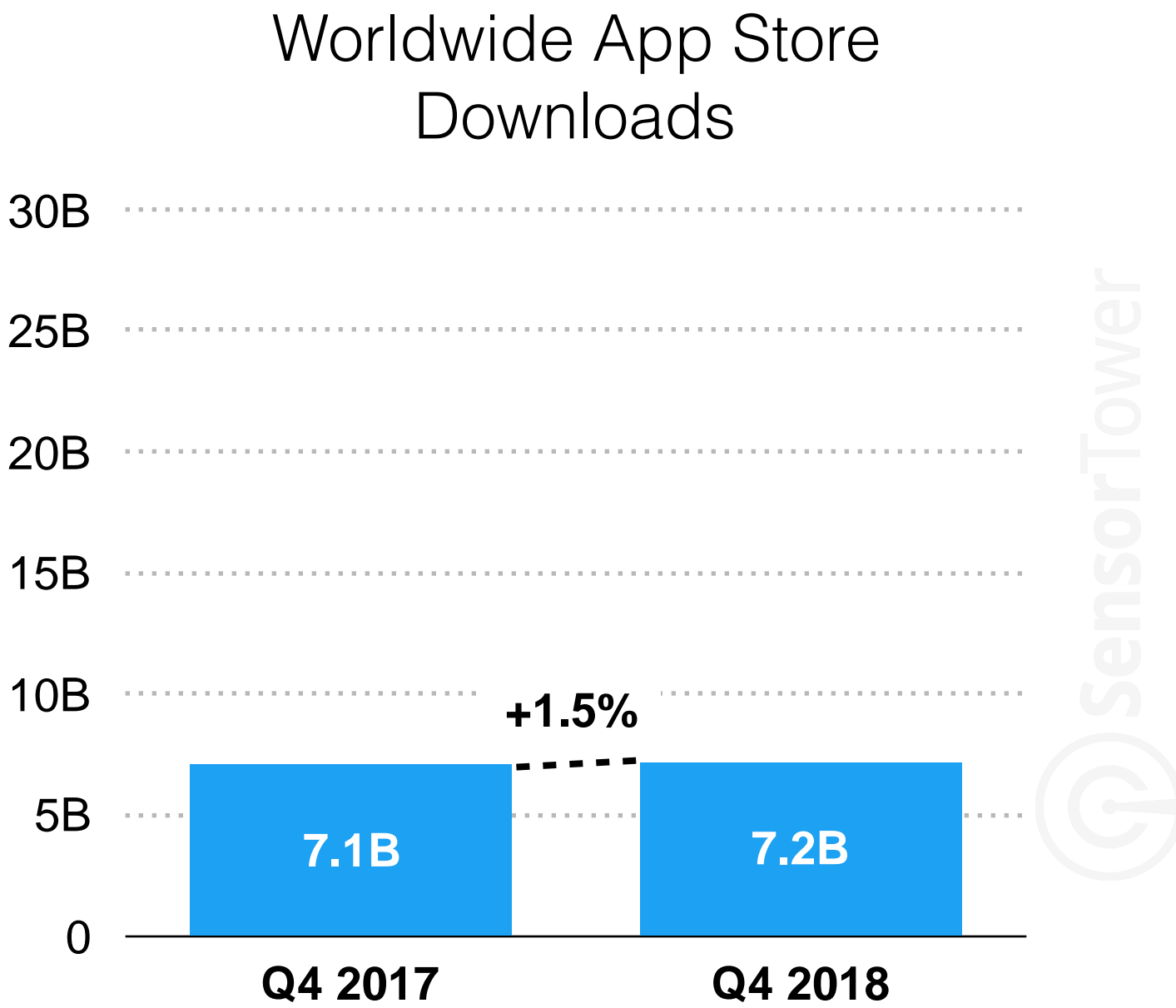
Could your business benefit from access to Store Intelligence insights and the highly accurate data used to build this report? See the fastest growing apps and publishers by downloads or revenue.

[Request Demo](#)



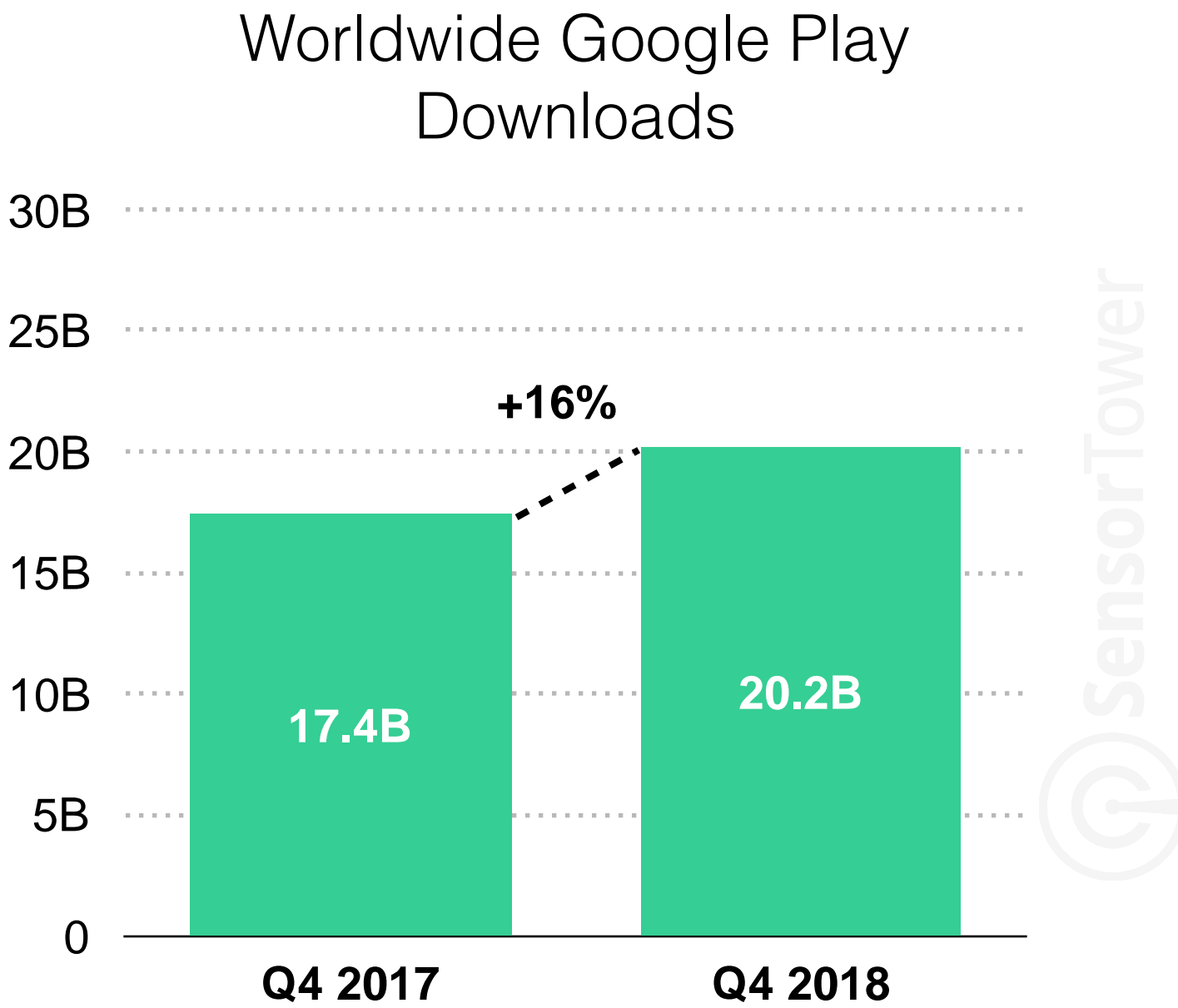
27.4 Billion

App Store + Google Play Downloads



7.2 Billion

App Store Downloads



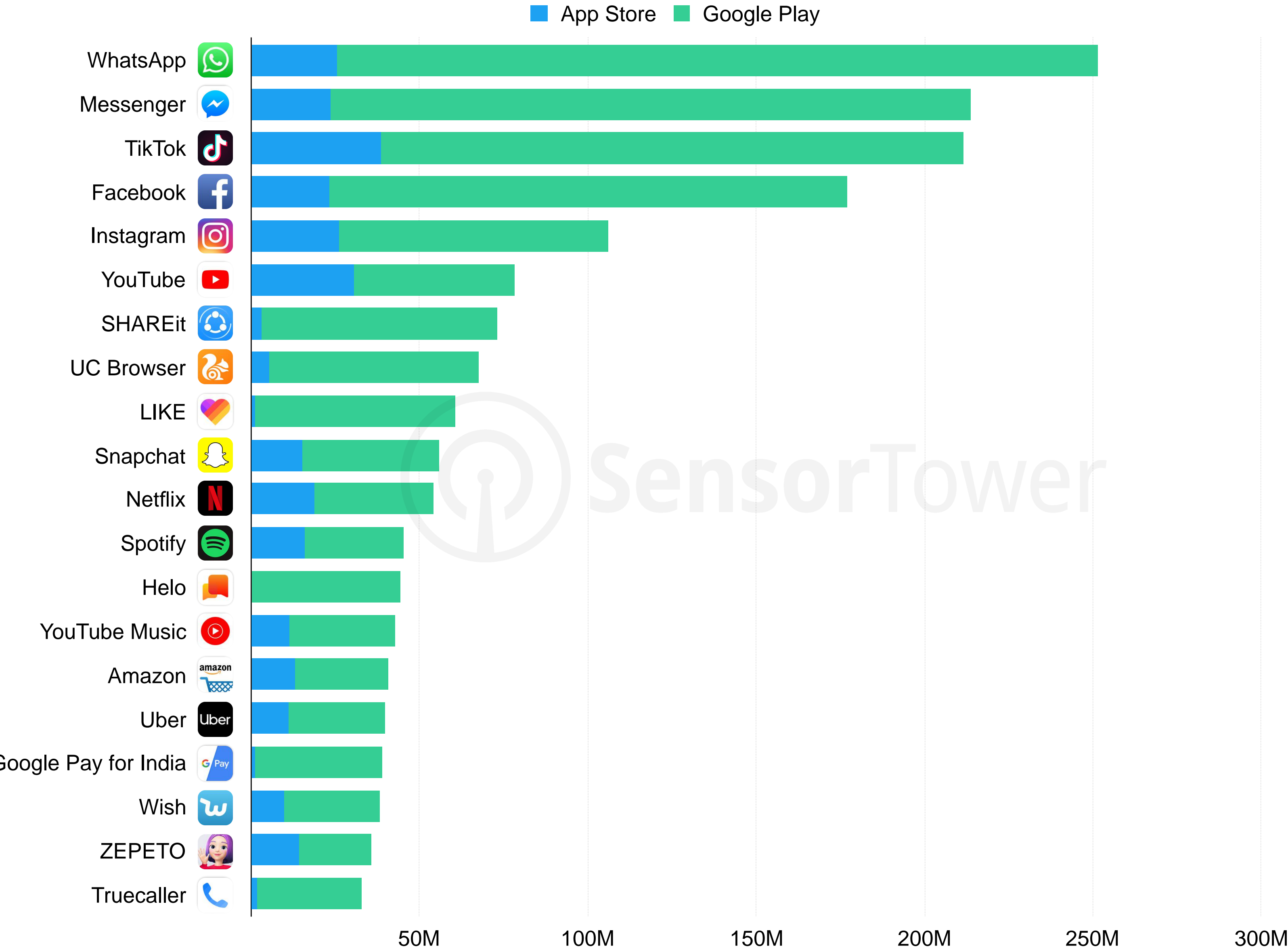
20.2 Billion

Google Play Downloads



Top Apps

Overall ▶ Q4 Apps by Worldwide Downloads



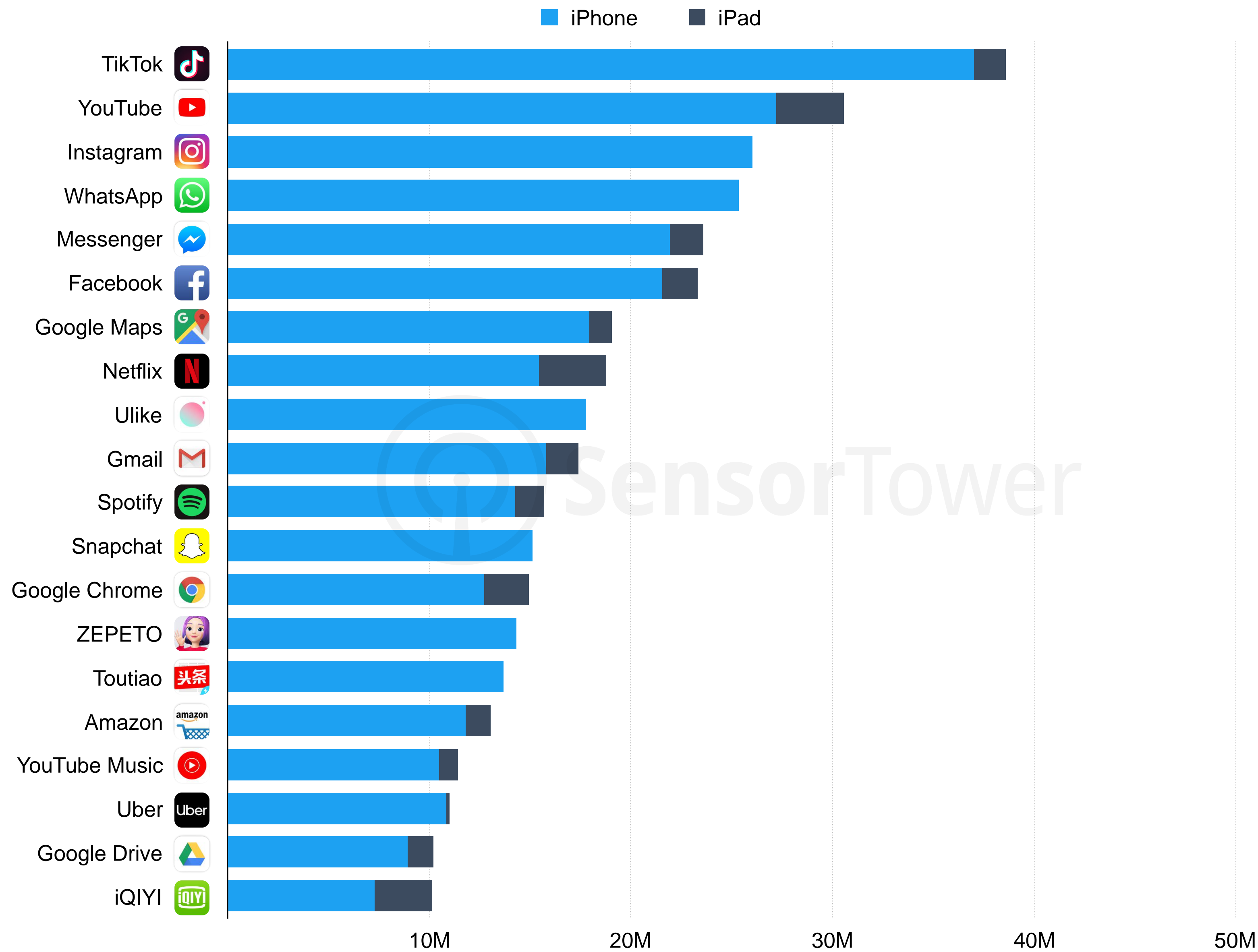
TikTok capped off a fantastic 2018 with its best rank of any quarter ever. The ByteDance-owned app was the No. 3 app by worldwide downloads in the quarter.

Google had three of the top 25 apps in Q4 2018. YouTube Music and Google Pay for India (formally Tez) joined YouTube among the top apps in the quarter.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Oct. 1 through Dec. 31, 2018. Apple apps and Google pre-installed apps are excluded. We report unique installs only. Android estimates do not include third-party stores. Figures represent aggregate installs of all app versions, ex: Facebook and Facebook Lite.

App Store ▶ Q4 Apps by Worldwide Downloads



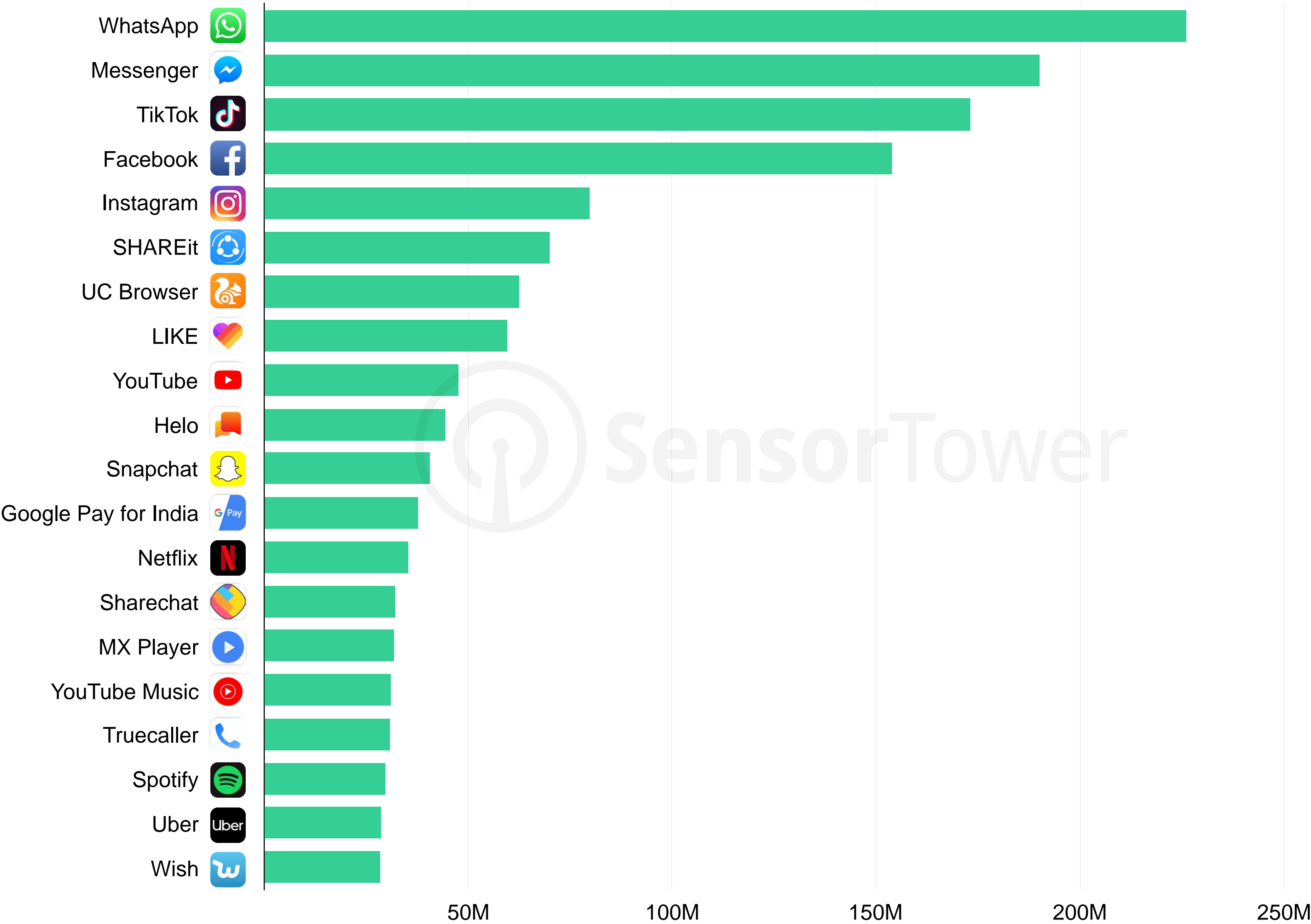
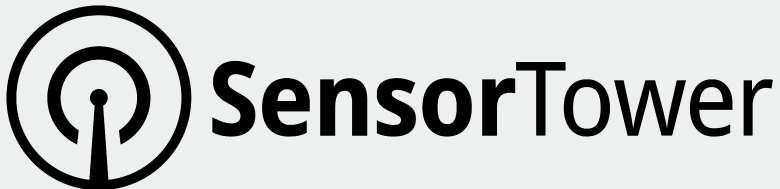
TikTok was the top app for the fourth consecutive quarter. YouTube and Facebook-owned Instagram, WhatsApp, Messenger, and Facebook took the next five spots.

Nine of the top 10 apps were the same as the previous quarter. New apps among the top 20 included ZEPETO, Toutiao, YouTube Music, and Google Drive.

Note Regarding Download Estimates

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Google Play ▶ Q4 Apps by Worldwide Downloads



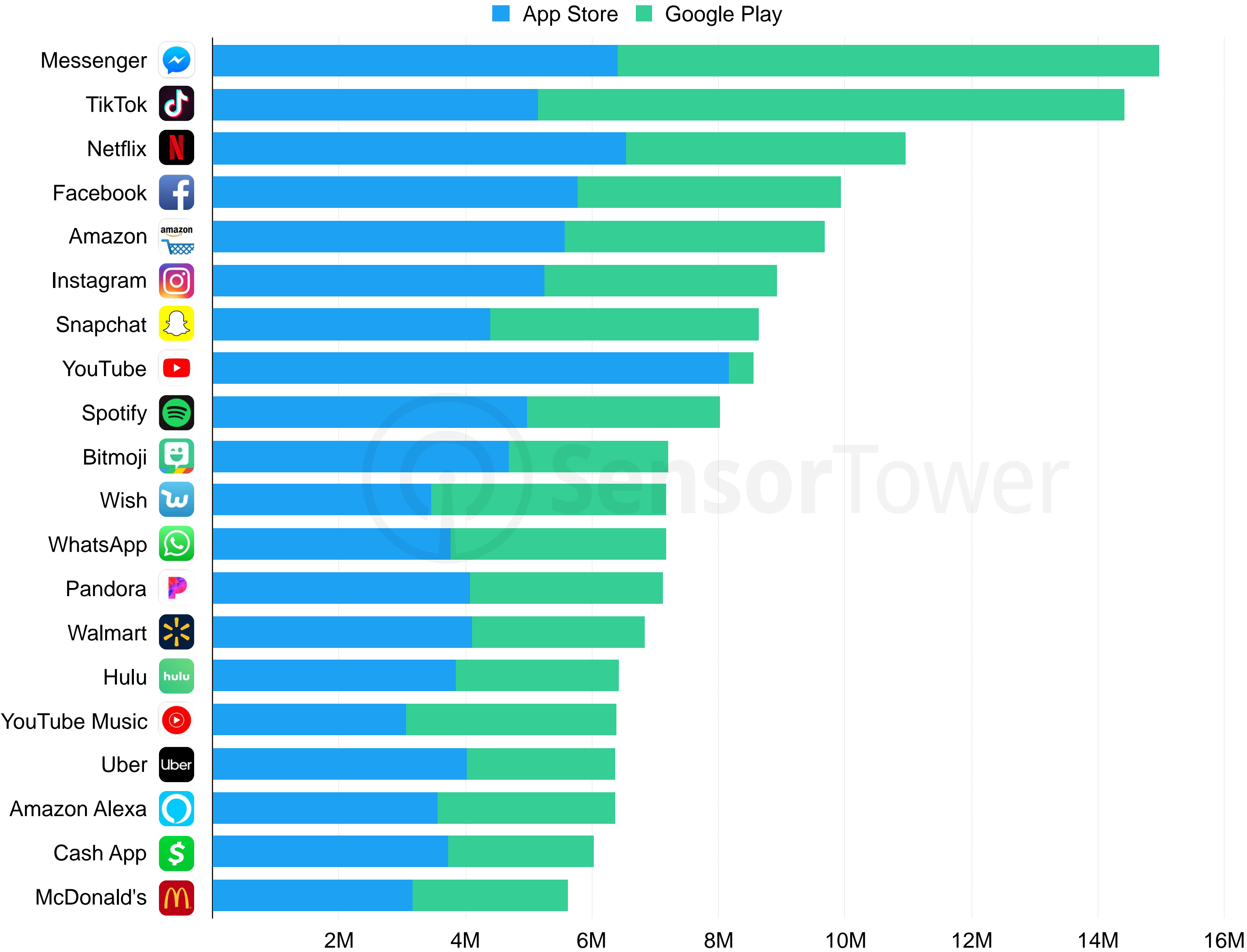
Success in India propelled apps into the top 20 for the first time. **LIKE, Helo, Google Pay for India, and Sharechat were among the top 10 apps in India** in Q4 2018.

Vigo Video fell out of the top 20 after ranking No. 8 the previous quarter. Increased TikTok installs offset this loss for ByteDance, the publisher of both of these apps.

Note Regarding Download Estimates

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Overall ▶ Q4 Apps by U.S. Downloads



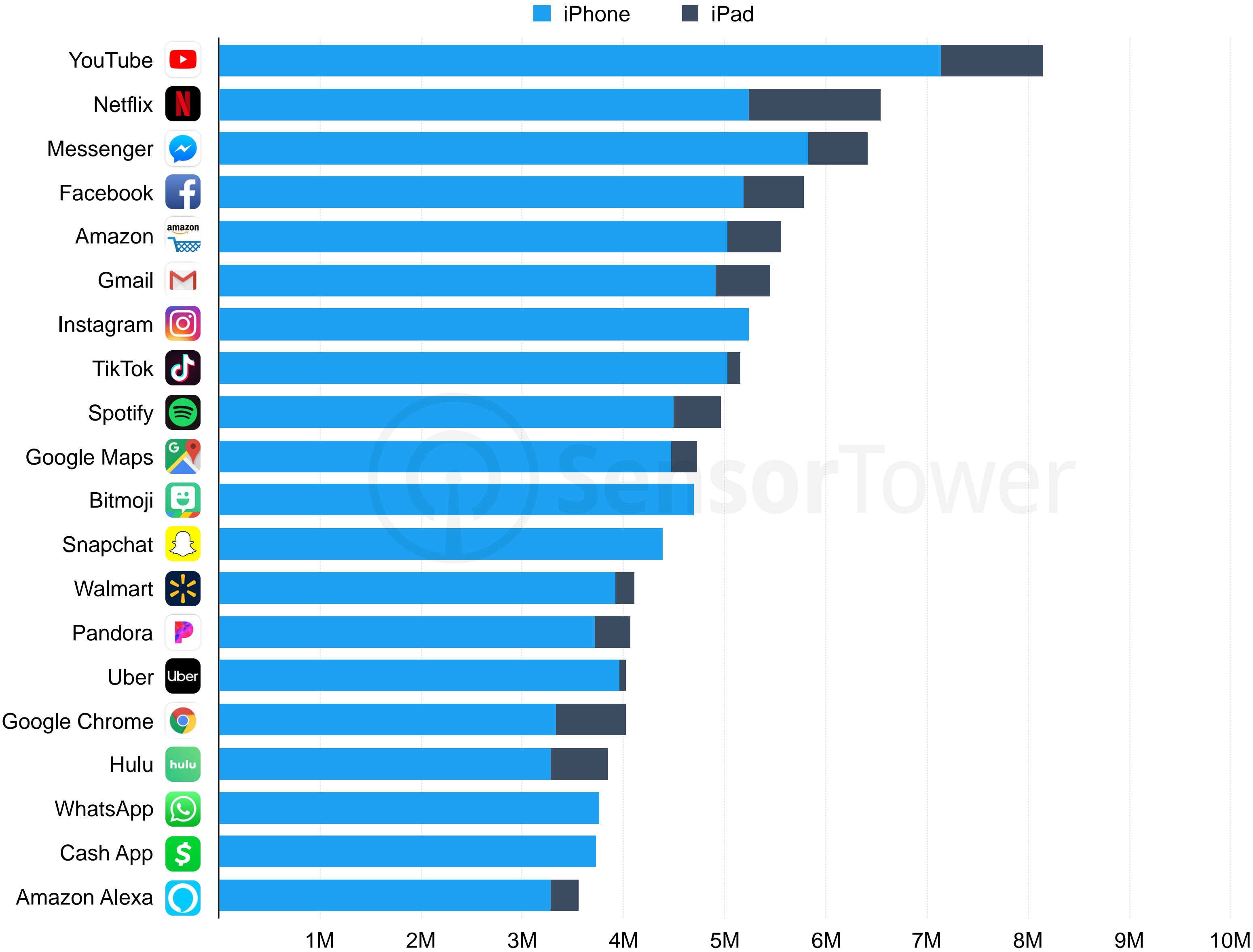
Amazon had a huge quarter, with the Amazon app ranking No. 5 in the U.S. at nearly 10M installs. Amazon Alexa (No. 23) was at the top of the U.S. iPhone charts between Dec. 25-27.

Some top brick & mortar stores and restaurants embraced a mobile focus in Q4 2018. **Walmart (No. 14) and McDonald's (No. 20) entered the top 20 this quarter.**

Note Regarding Download Estimates

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App Store ▶ Q4 Apps by U.S. Downloads



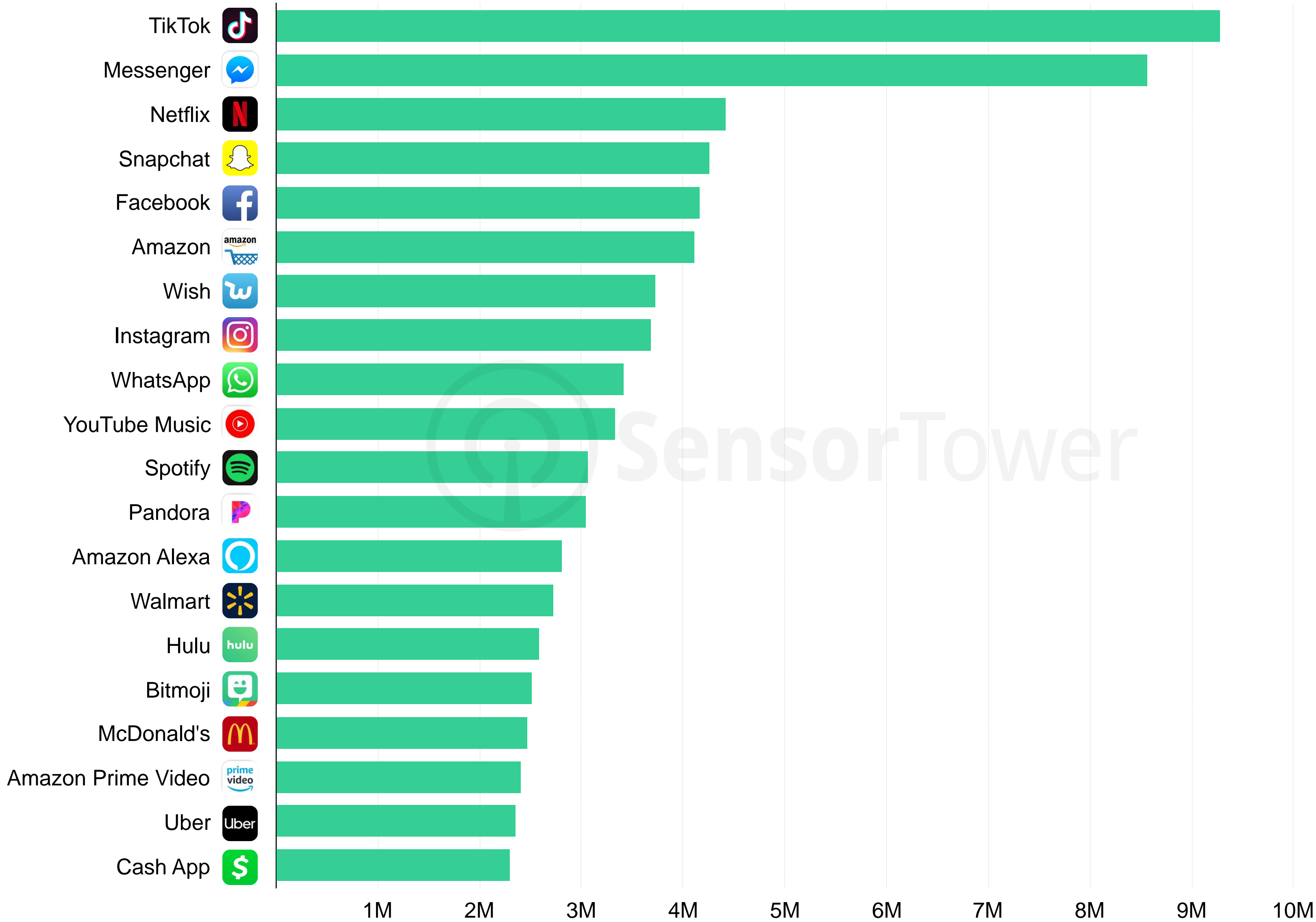
YouTube passed Messenger to take the top spot in Q4 2018. Google also had Gmail (No. 6) and Google Maps (No. 10) among the top 10 apps by U.S. App Store downloads.

Hulu had its best quarter ever with almost 4 million U.S. App Store downloads. This was an increase of 18% from its previous high in Q3, and up 45% year-over-year.

Note Regarding Download Estimates

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Google Play ▶ Q4 Apps by U.S. Downloads



TikTok became the No. 1 Google Play app for the first time in Q4 2018. U.S. downloads grew from 5.5M in Q3 to more than 9M in Q4, an increase of almost 70%.

Subscription video on-demand (SVOD) apps had a strong quarter in the U.S. Netflix moved up six spots from Q3 2018 to No. 3 overall, and Hulu moved up four spots to No. 15.

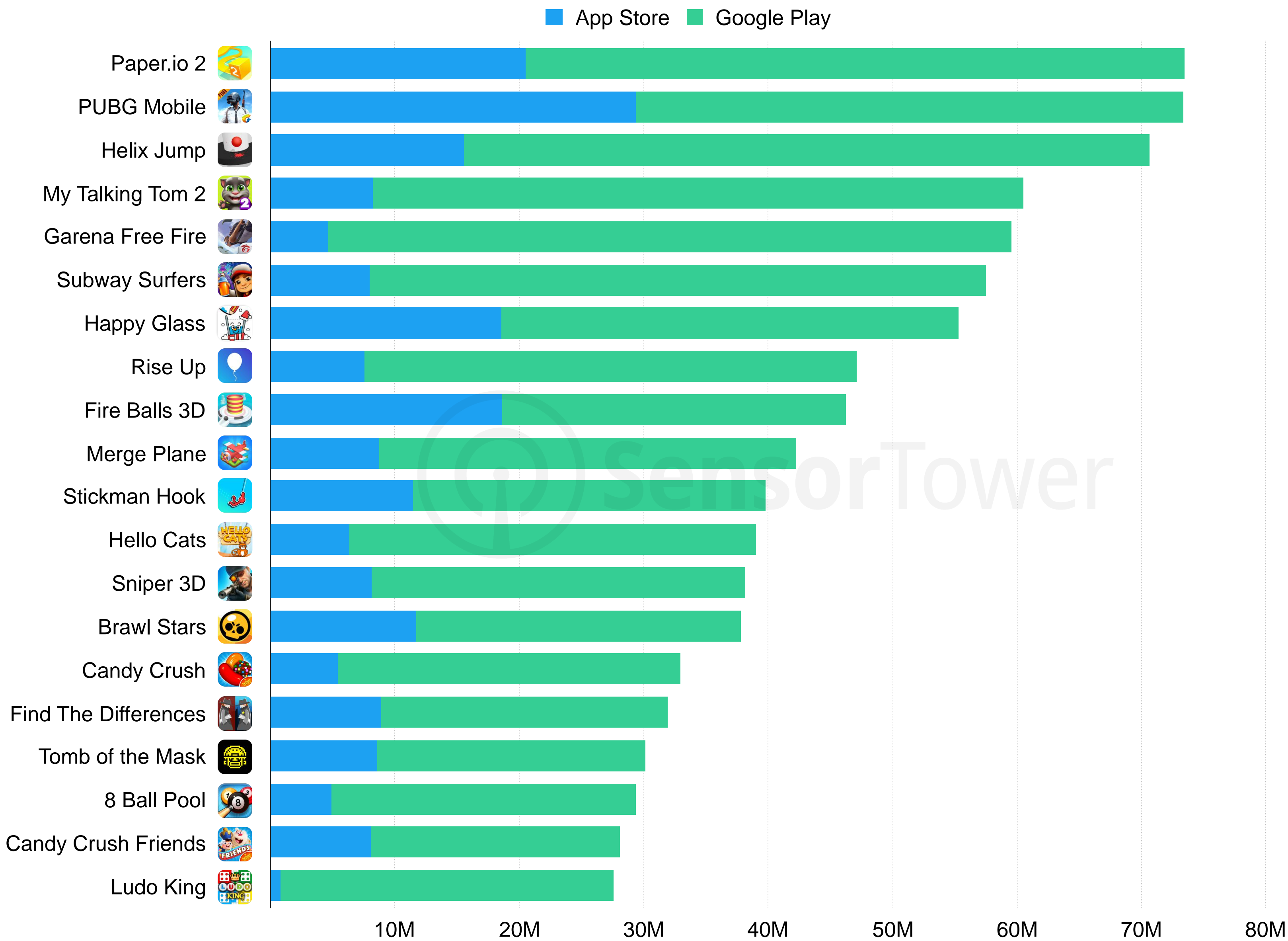
Note Regarding Download Estimates

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Top Games

Overall ▶ Q4 Games by Worldwide Downloads



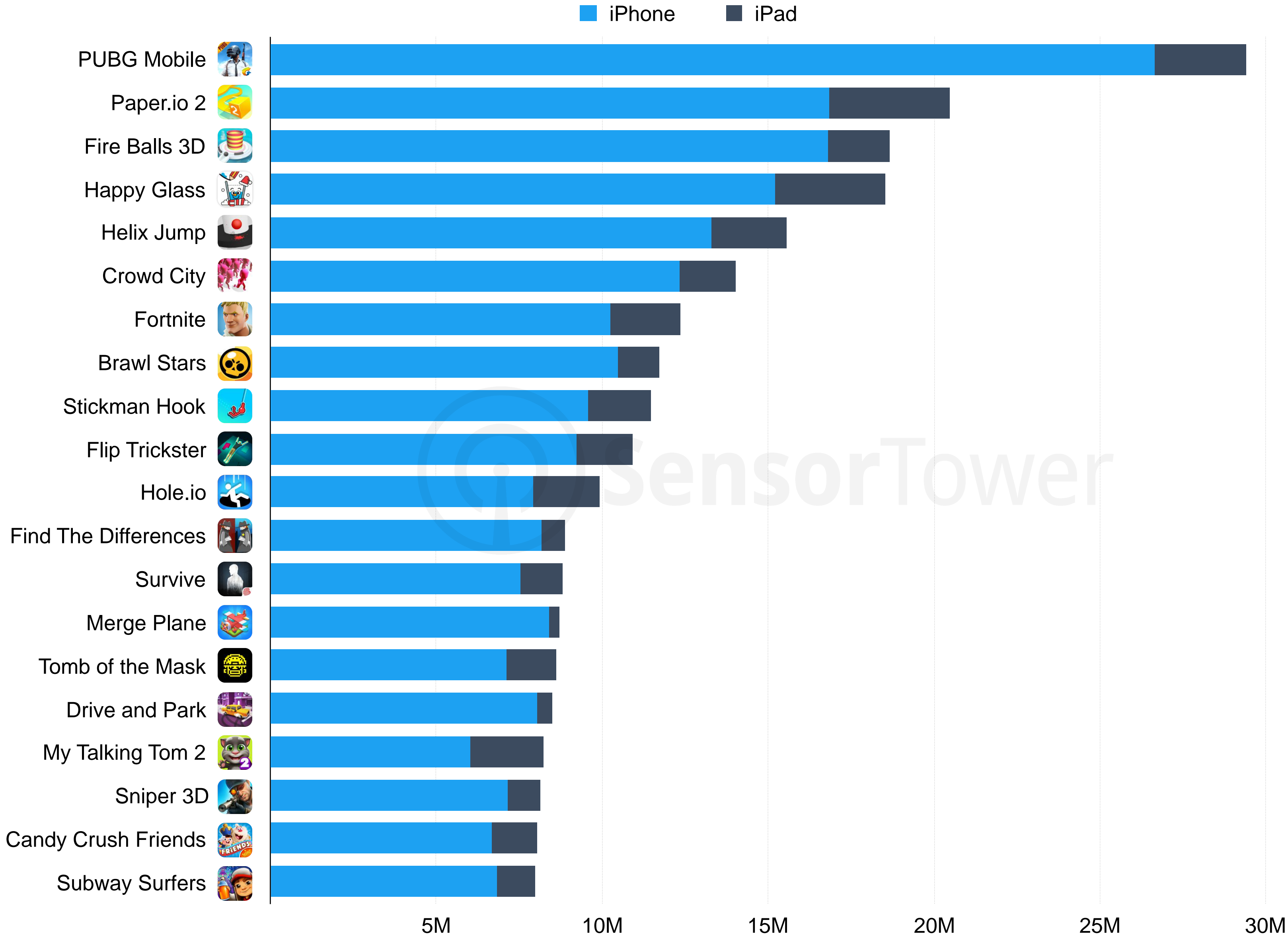
Garena Free Fire was among the top five games in Q4 2018. Success in Brazil, India, Mexico, and Southeast Asia helped the game reach almost 60M installs, its best quarter yet.

Voodoo had the No. 1 game for the third straight quarter, with Paper.io 2 taking the top spot. Helix Jump, the top game from the last two quarters, fell to No. 3 in Q4.

Note Regarding Download Estimates

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App Store ▶ Q4 Games by Worldwide Downloads



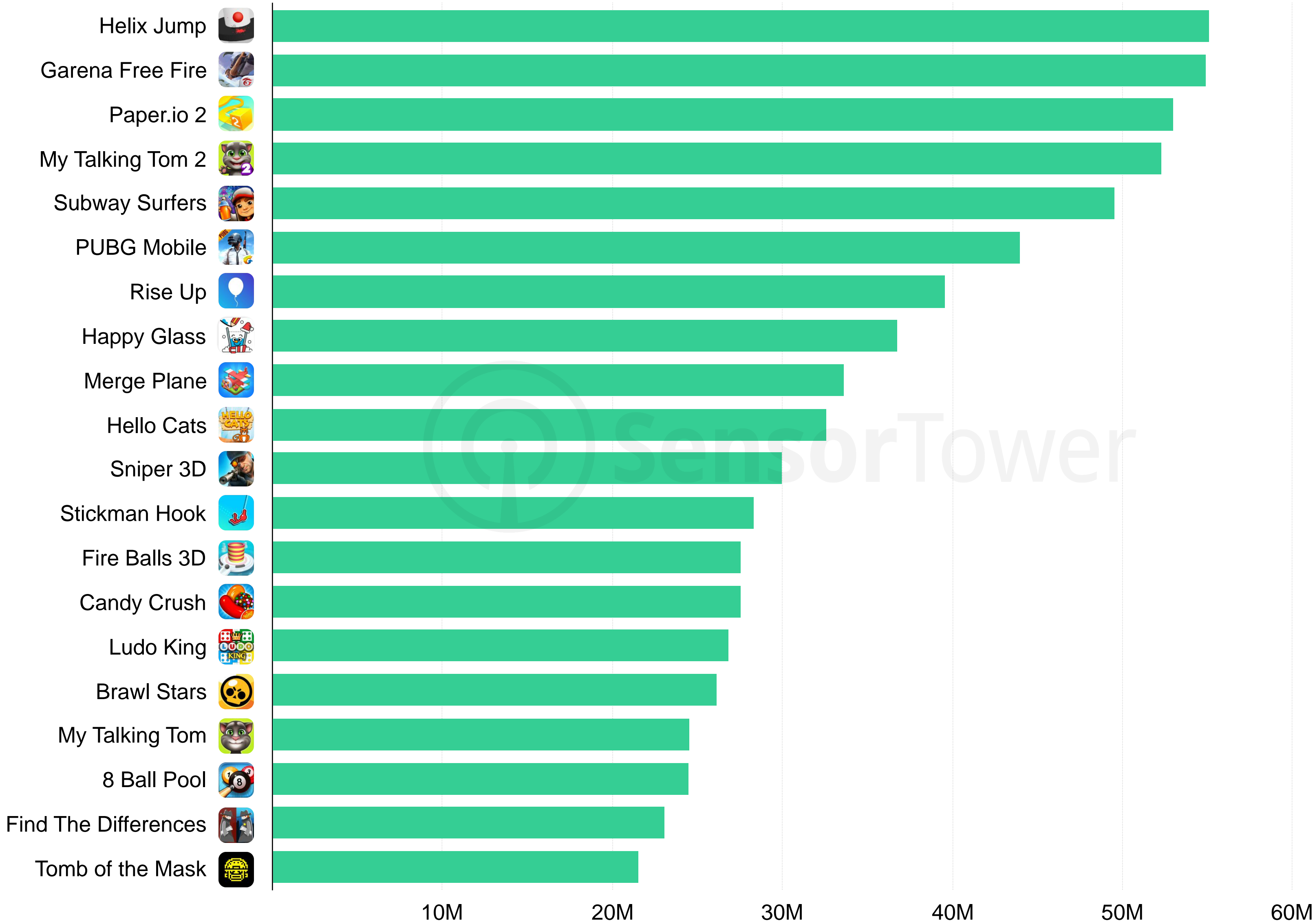
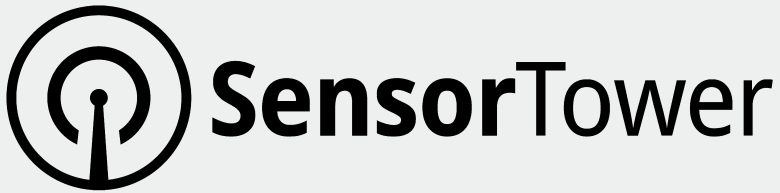
PUBG Mobile has been the top App Store game each quarter since launch in Q1 2018. Installs fell from the previous quarter, but remained 9M ahead of the next game.

Despite remaining in soft launch until early December, Supercell’s **Brawl Stars was the No. 8 App Store game in 4Q18.** Only Voodoo’s Crowd City had more December installs.

Note Regarding Download Estimates

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Google Play ▶ Q4 Games by Worldwide Downloads



Helix Jump was the top Google Play game for the third quarter in a row.

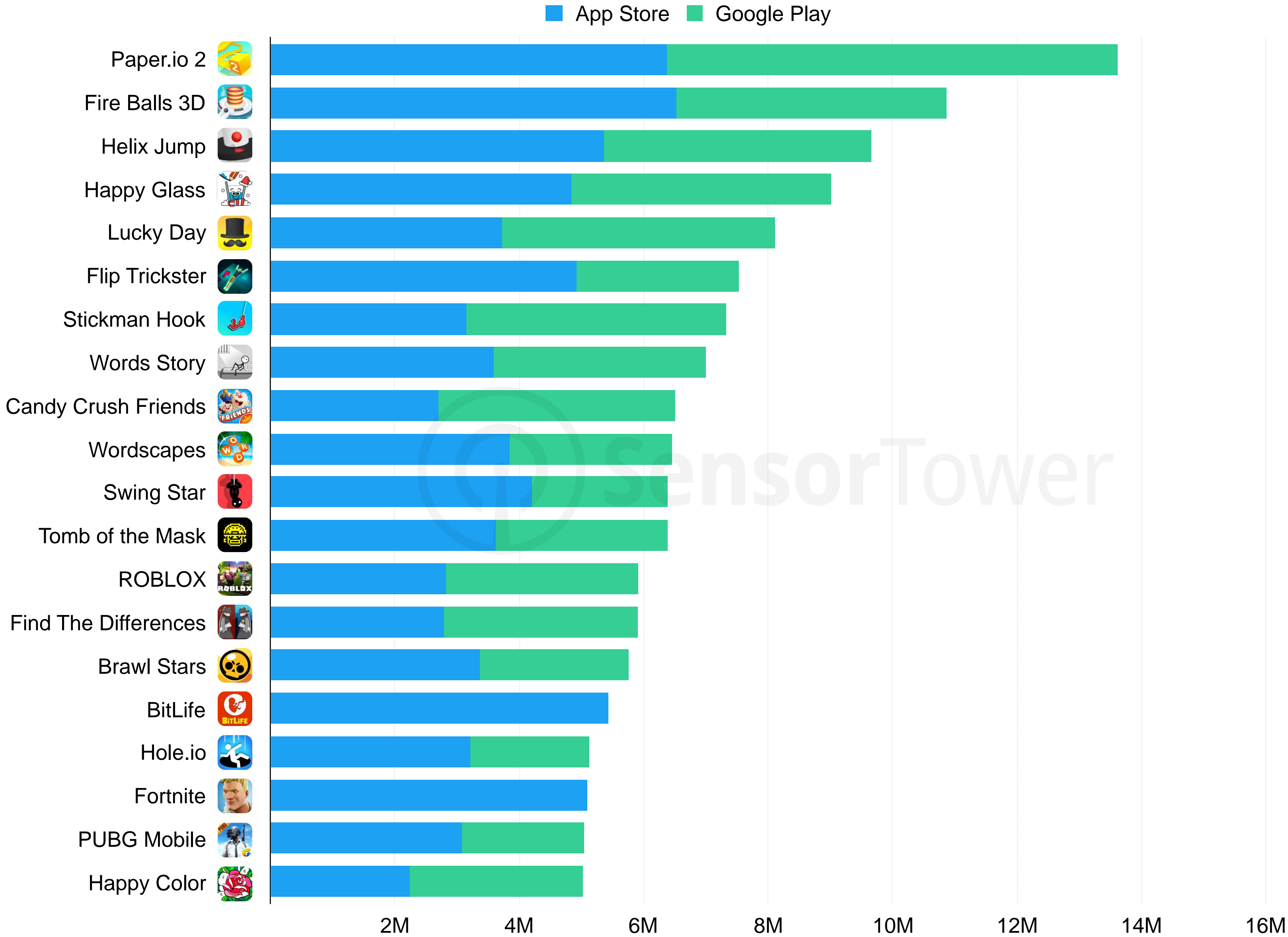
Four games had more than 50M downloads, up from only two games the previous quarter.

Outfit7 Limited continued to find success with the Talking Tom and Friends franchise. **My Talking Tom 2, released globally in November, was the No. 4 game in the quarter.**

Note Regarding Download Estimates

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Overall ▶ Q4 Games by U.S. Downloads



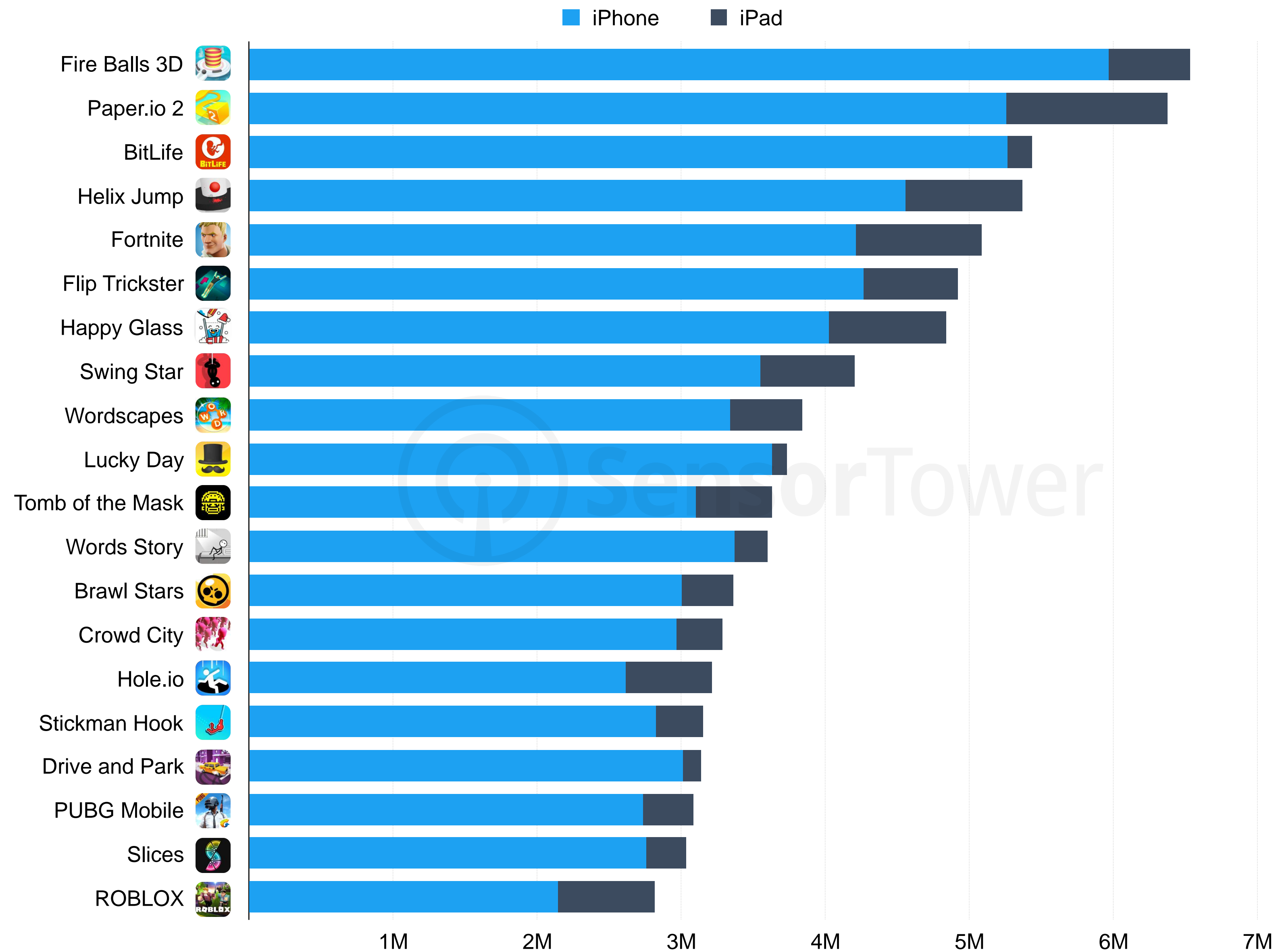
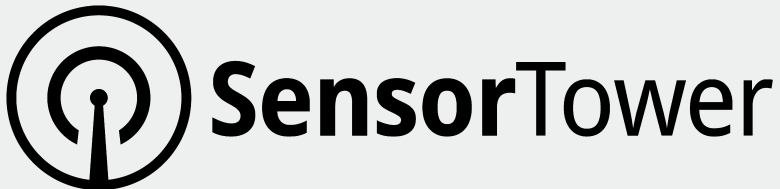
Hyper-casual games publisher Voodoo had the top three games in Q4 2018 with Paper.io 2, Fire Balls 3D, and Helix Jump respectively. Hole.io was also among the top 20.

Another hyper-casual games publisher, Lion Studios, also continued to produce top games in 4Q18. Flip Trickster joined Happy Glass as a top 10 game.

Note Regarding Download Estimates

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App Store ▶ Q4 Games by U.S. Downloads



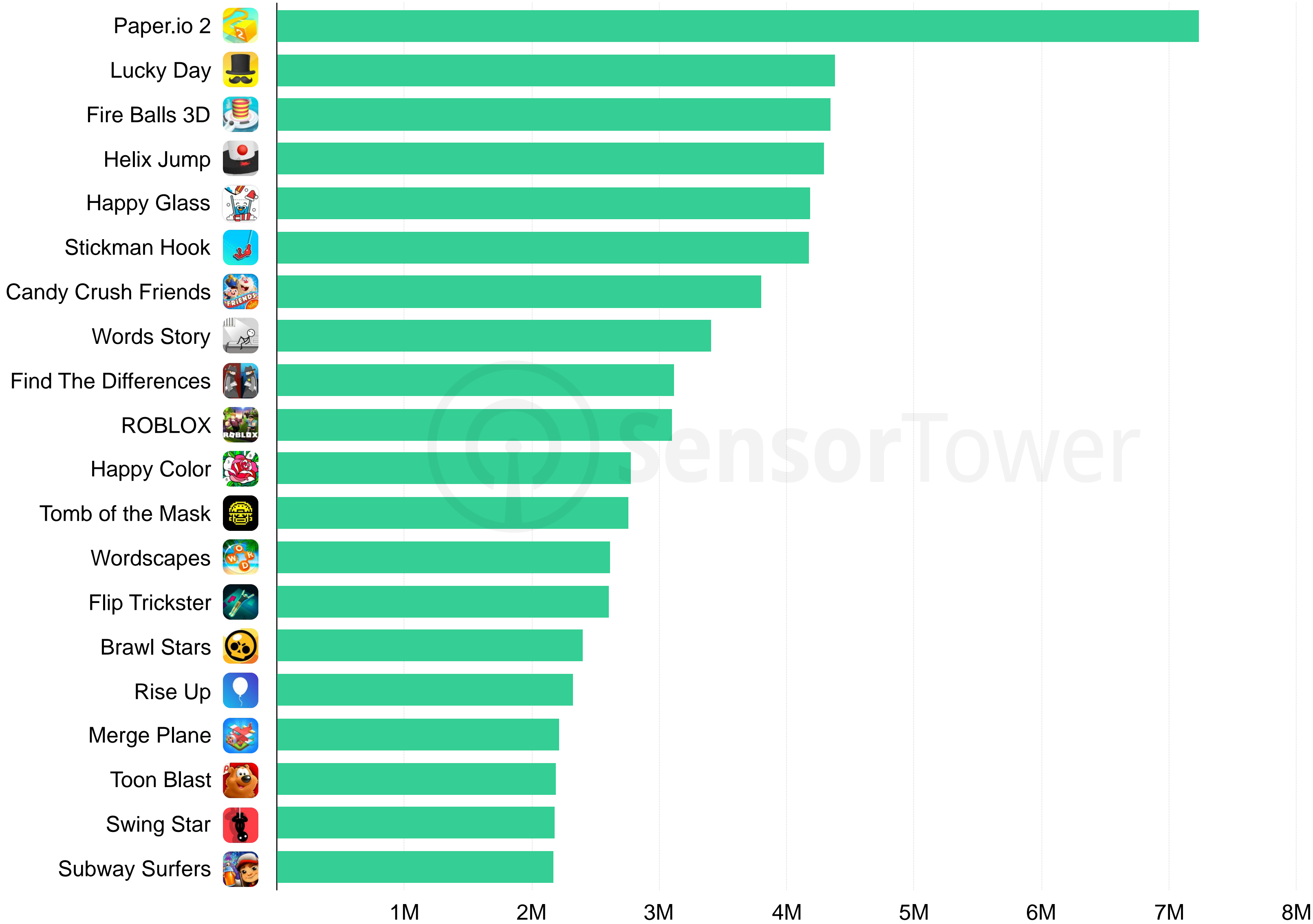
Fortnite remained in the top five App Store games in the U.S. The Epic Games sensation had more than 500K downloads on Christmas day, its best day since early April.

BitLife, only available on the App Store, was the No. 3 game in the U.S. Its publisher, Candywriter, had not had an app reach 2M installs since 2014.

Note Regarding Download Estimates

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Google Play ▶ Q4 Games by U.S. Downloads



King's newest addition to the Candy Crush franchise, **Candy Crush Friends**, ranked **No. 7 in the U.S. on Google Play**. This was King's best ranking game since Q1 2017.

Voodoo had its most successful quarter in the U.S. on Google Play. Paper.io 2, Fire Balls 3D, and Helix Jump took the No. 1, 3, and 4 spots, respectively, in the quarter.

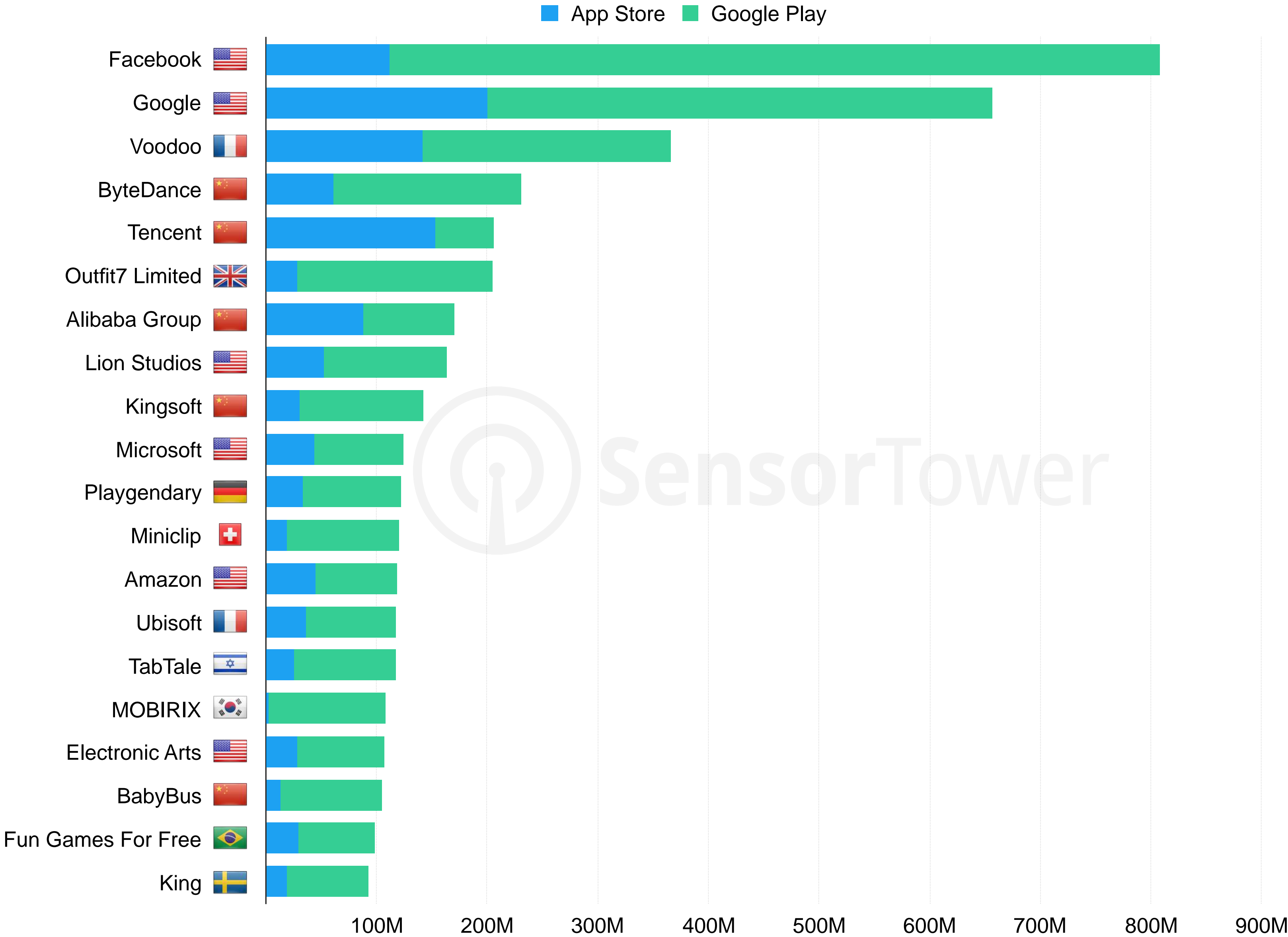
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Top Publishers

Overall ▶ Q4 Publishers by Worldwide Downloads



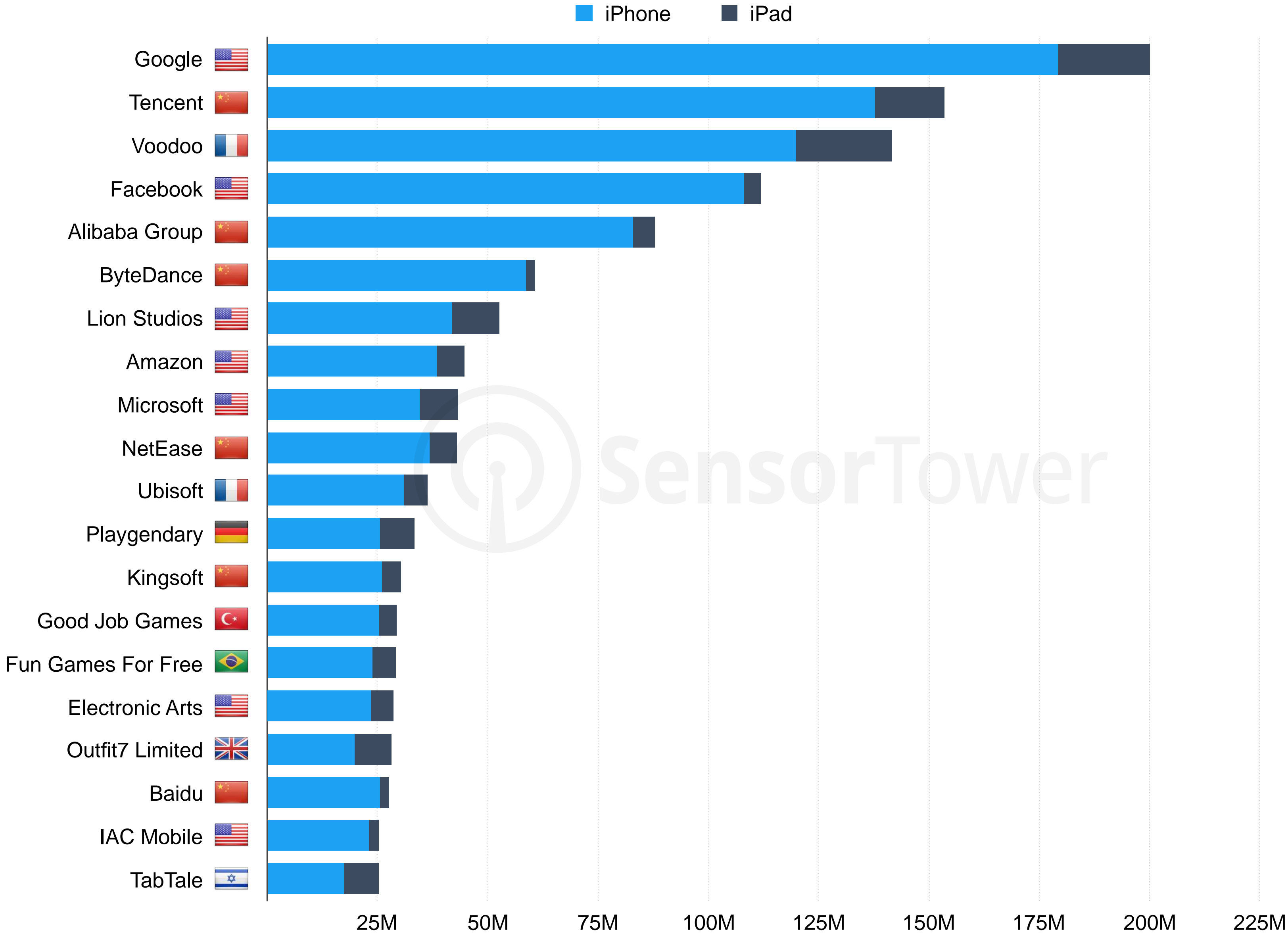
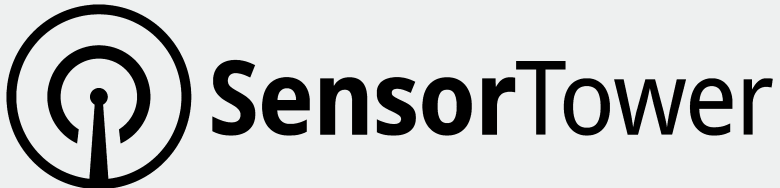
Propelled by TikTok’s continued rise in India, **ByteDance passed Tencent to become the top Chinese publisher in Q4 2018.** The publisher was No. 4 worldwide in Q4 2018.

Lion Studios capped off an excellent 2018 by reaching the No. 8 spot in Q4. The publisher grew from less than 5 million downloads in Q1 2018 to 163 million in Q4.

Note Regarding Download Estimates

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App Store ▶ Q4 Publishers by Worldwide Downloads

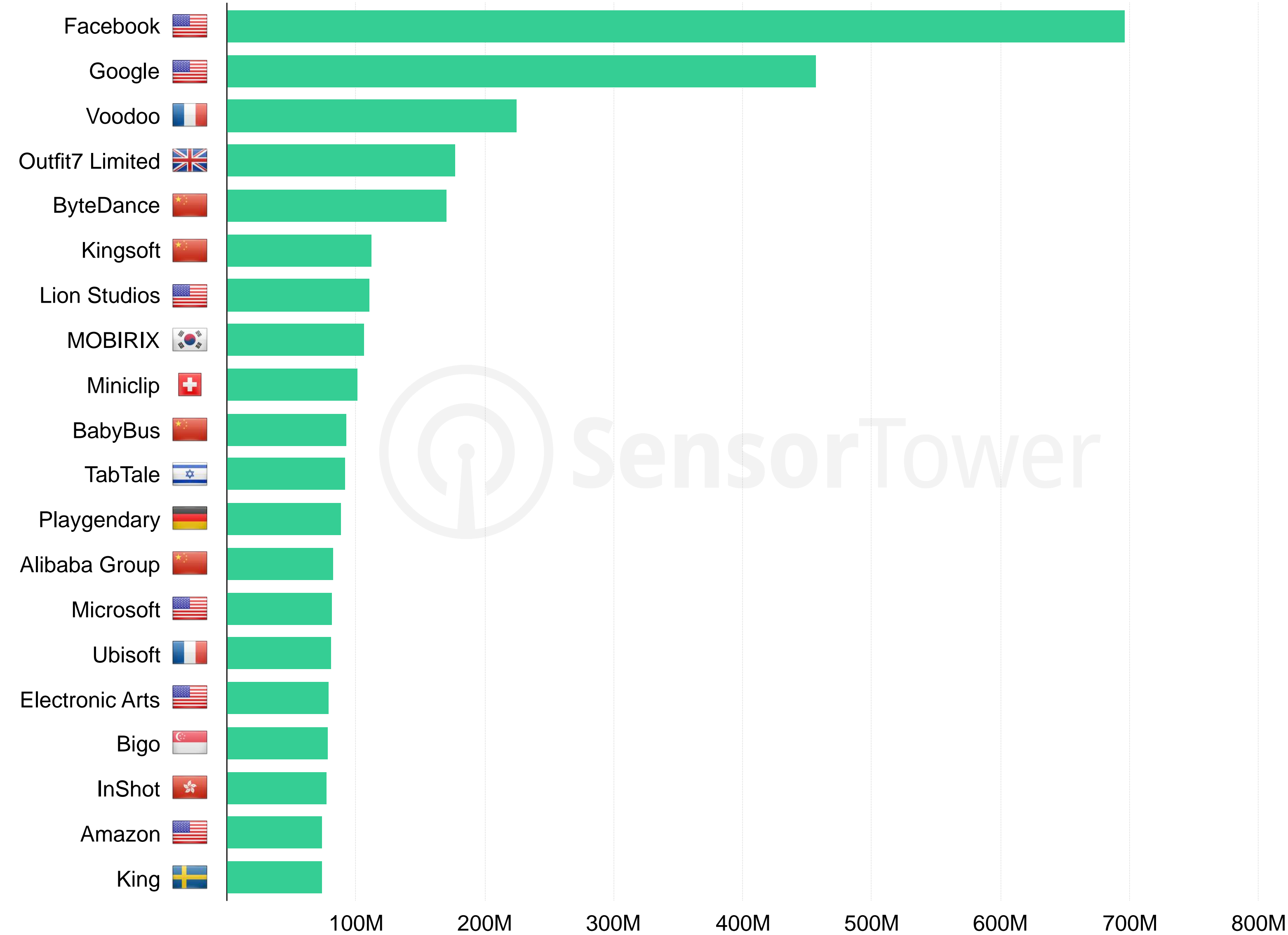
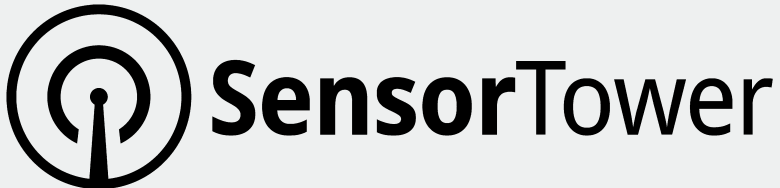


Amazon moved up three spots from the previous quarter to rank No. 8. Amazon Alexa had 11 million installs, with 4 million in the week between Christmas and New Year's Day alone.

Good Job Games, based in Turkey, had some top hyper-casual games in the quarter. Games like Swing Star, Slices, and Color Bump 3D helped the publisher reach the top 20.

Note Regarding Download Estimates
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Google Play ▶ Q4 Publishers by Worldwide Downloads



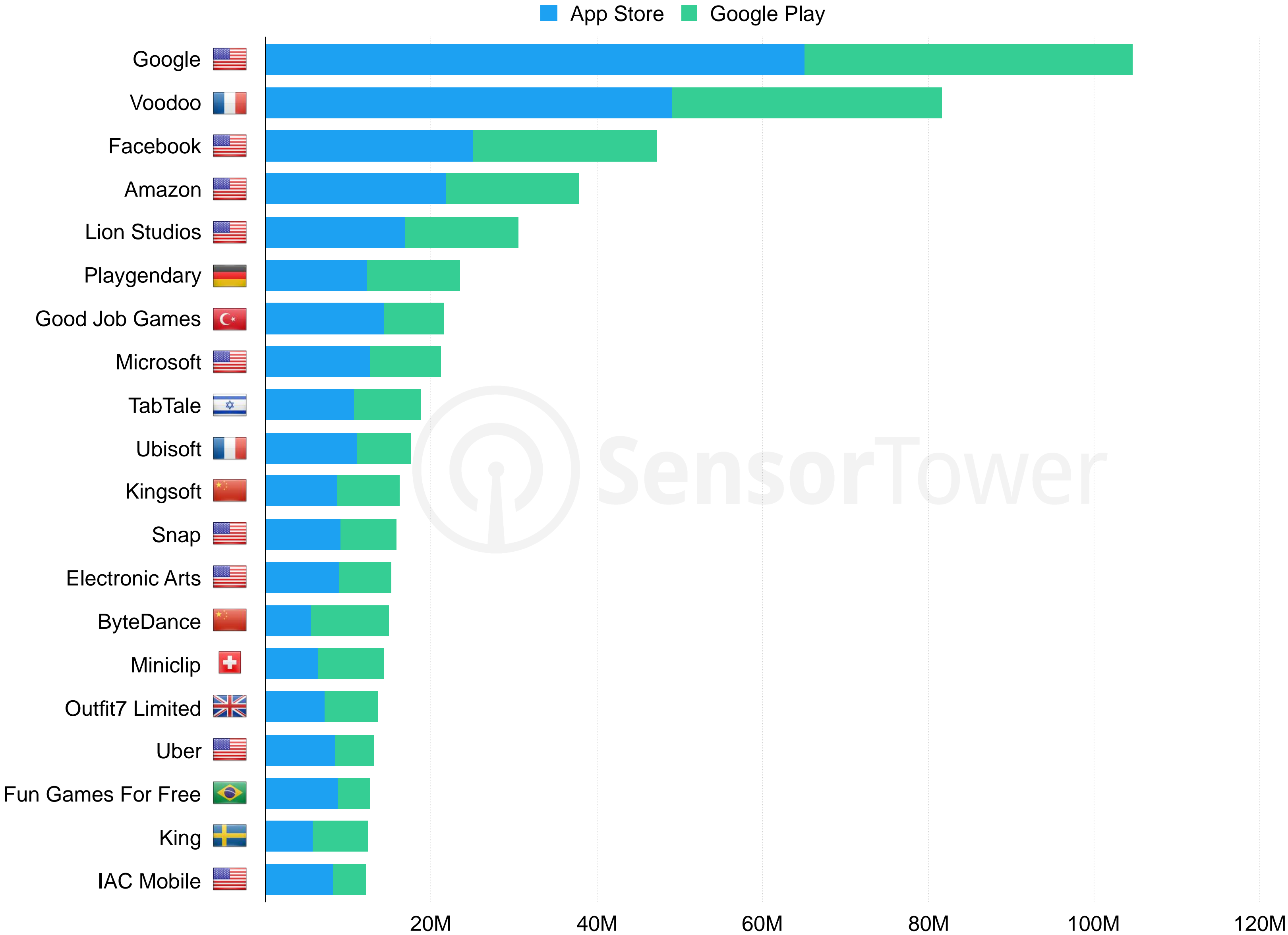
Google had a very strong quarter on Google Play, with download growth of 25% quarter-over-quarter. Top apps included Google Pay for India, YouTube, and YouTube Music.

The top six publishers remained the same as the previous quarter. The only change in ranking among them was Outfit7 Limited passing ByteDance to take the No. 4 spot.

Note Regarding Download Estimates

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Overall ▶ Q4 Publishers by U.S. Downloads



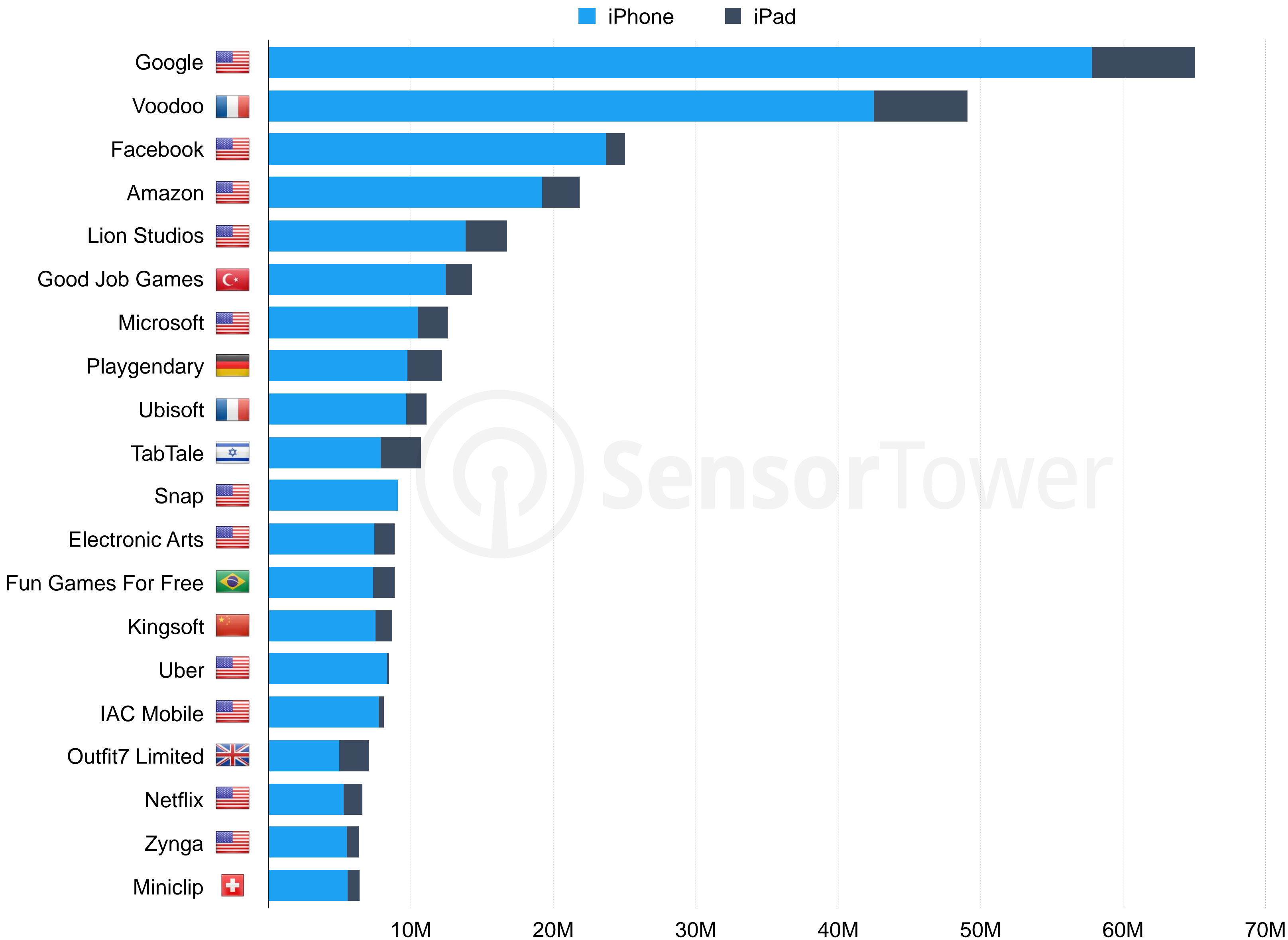
Google surpassed 100 million U.S. installs in Q4 2018 with nearly 105 million. This was only the third time the publisher reached that threshold and its highest mark to date

Good Job Games reached the top 20 for the first time in Q4, entering at No. 7. Its 21 million downloads was an increase of nearly 300% quarter-over-quarter.

Note Regarding Download Estimates

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App Store ▶ Q4 Publishers by U.S. Downloads



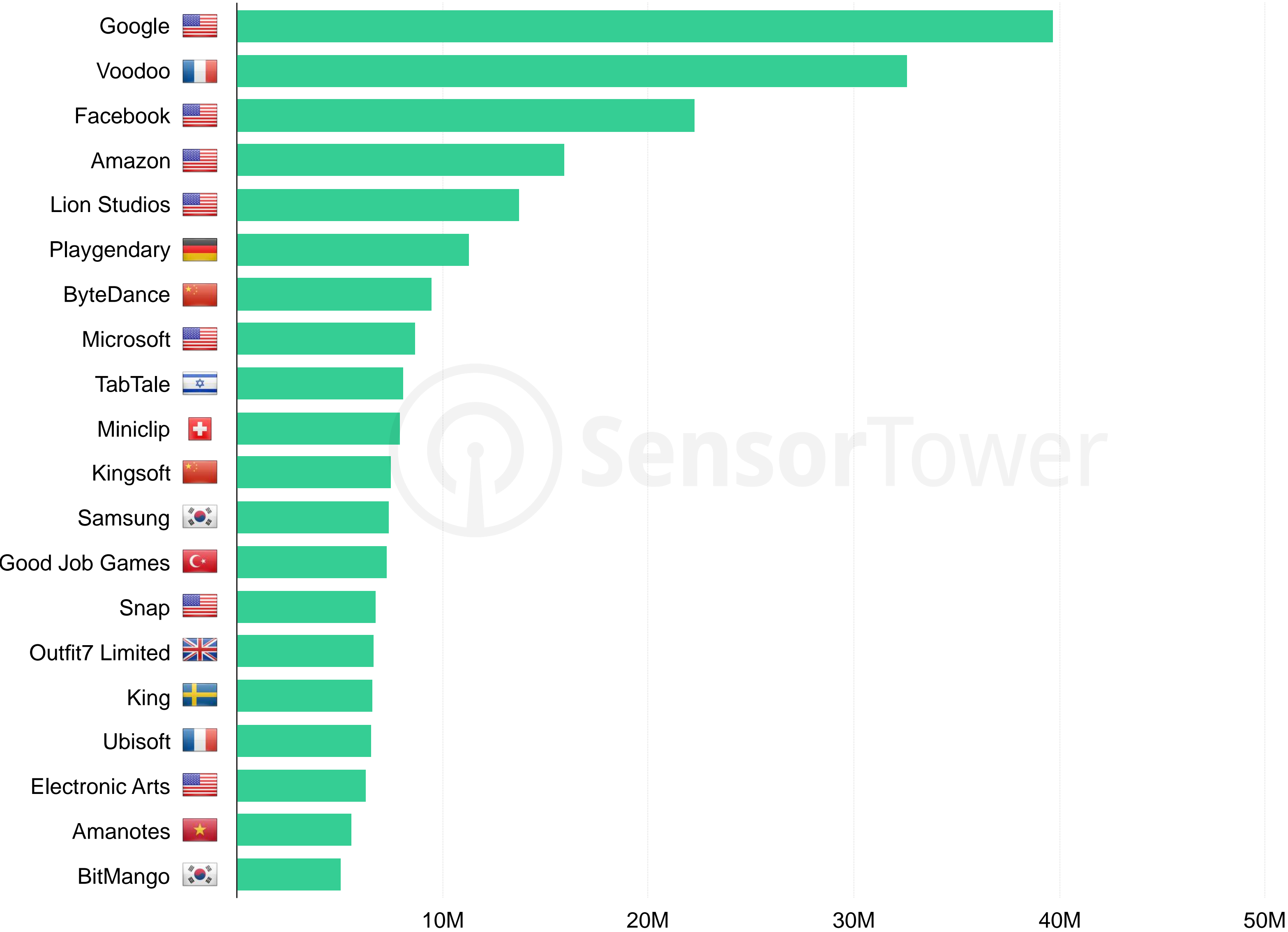
There was not much movement among the top publishers in Q4 2018, with the same top five as the previous quarter. Five of the top seven publishers are U.S.-based.

Snap, publisher of Snapchat and Bitmoji, had 9 million installs in Q4 2018. It moved up four spots vs. the previous quarter, though this was still its lowest fourth quarter since 2015.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Oct. 1 through Dec. 31, 2018. Apple apps are excluded. We report unique installs only (one download per User).

Google Play ▶ Q4 Publishers by U.S. Downloads

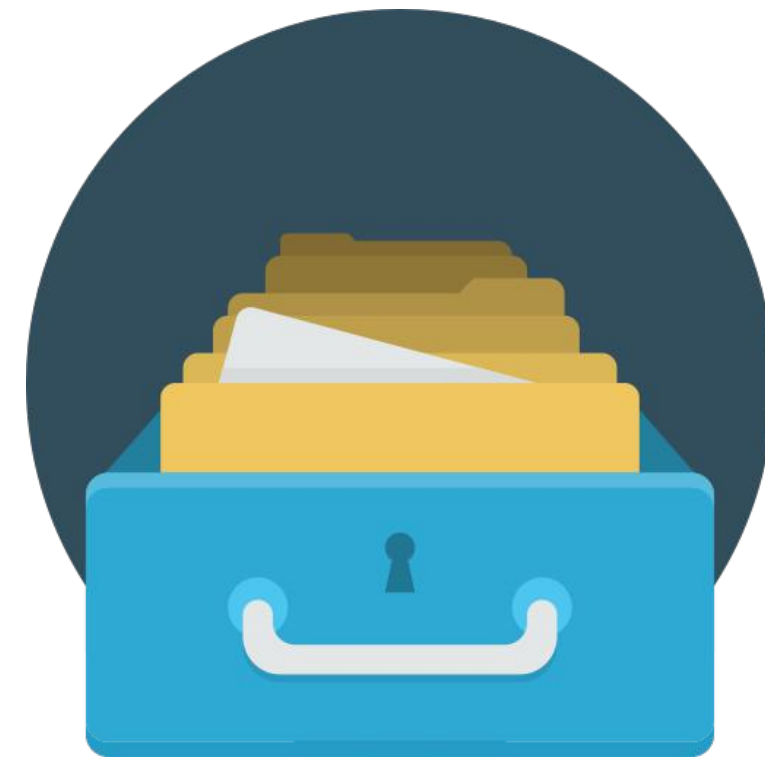


ByteDance was a top 10 U.S. publisher on Google Play for the first time Q4. The China-based publisher ranked seventh overall, and third among non-U.S. publishers.

11 countries were represented among the top 20 U.S. publishers on Google Play. The U.S. led the way with seven, followed by France, China, and South Korea with two apiece.

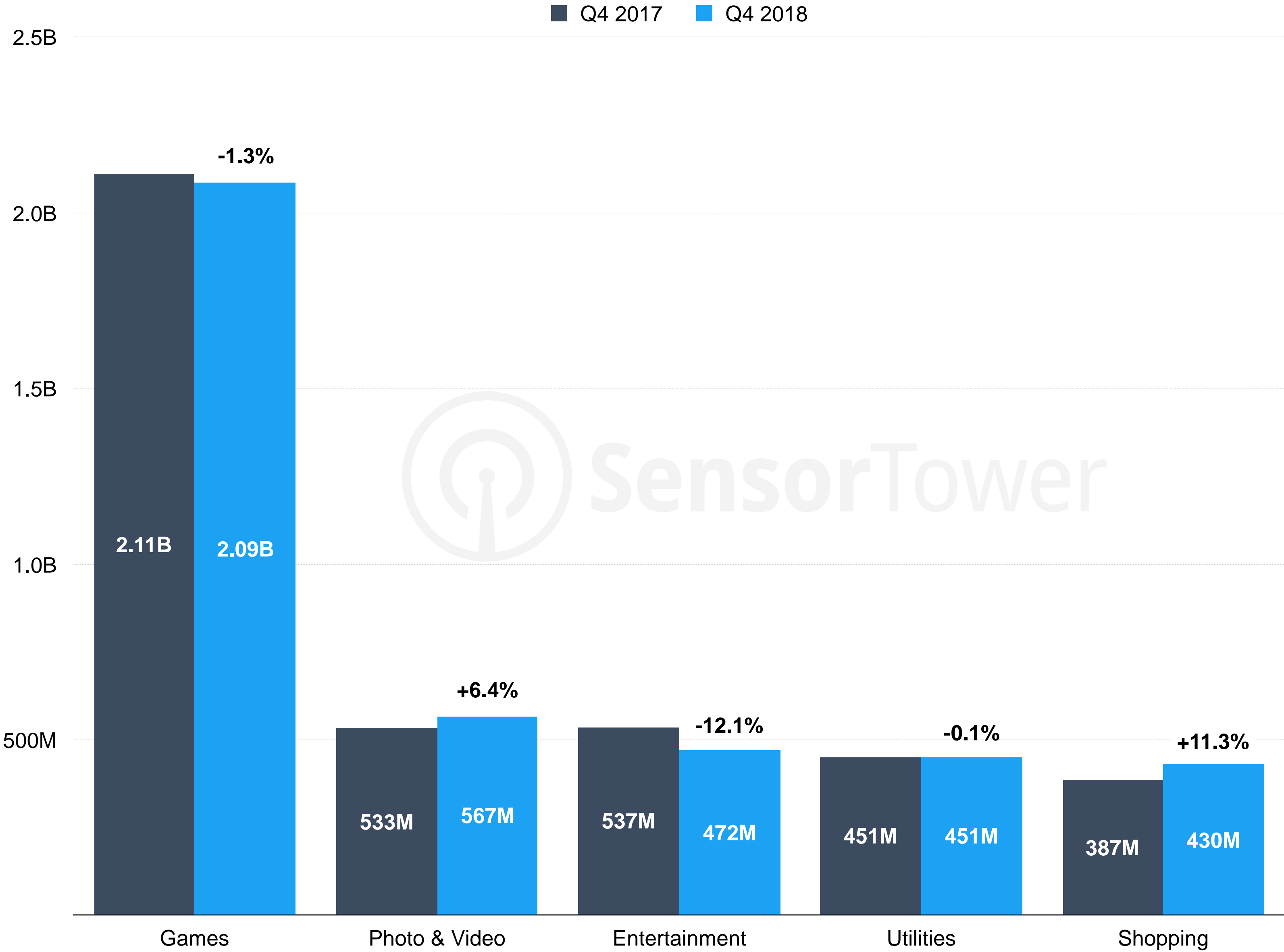
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Top Categories

App Store ▶ Q4 Categories by Worldwide Downloads



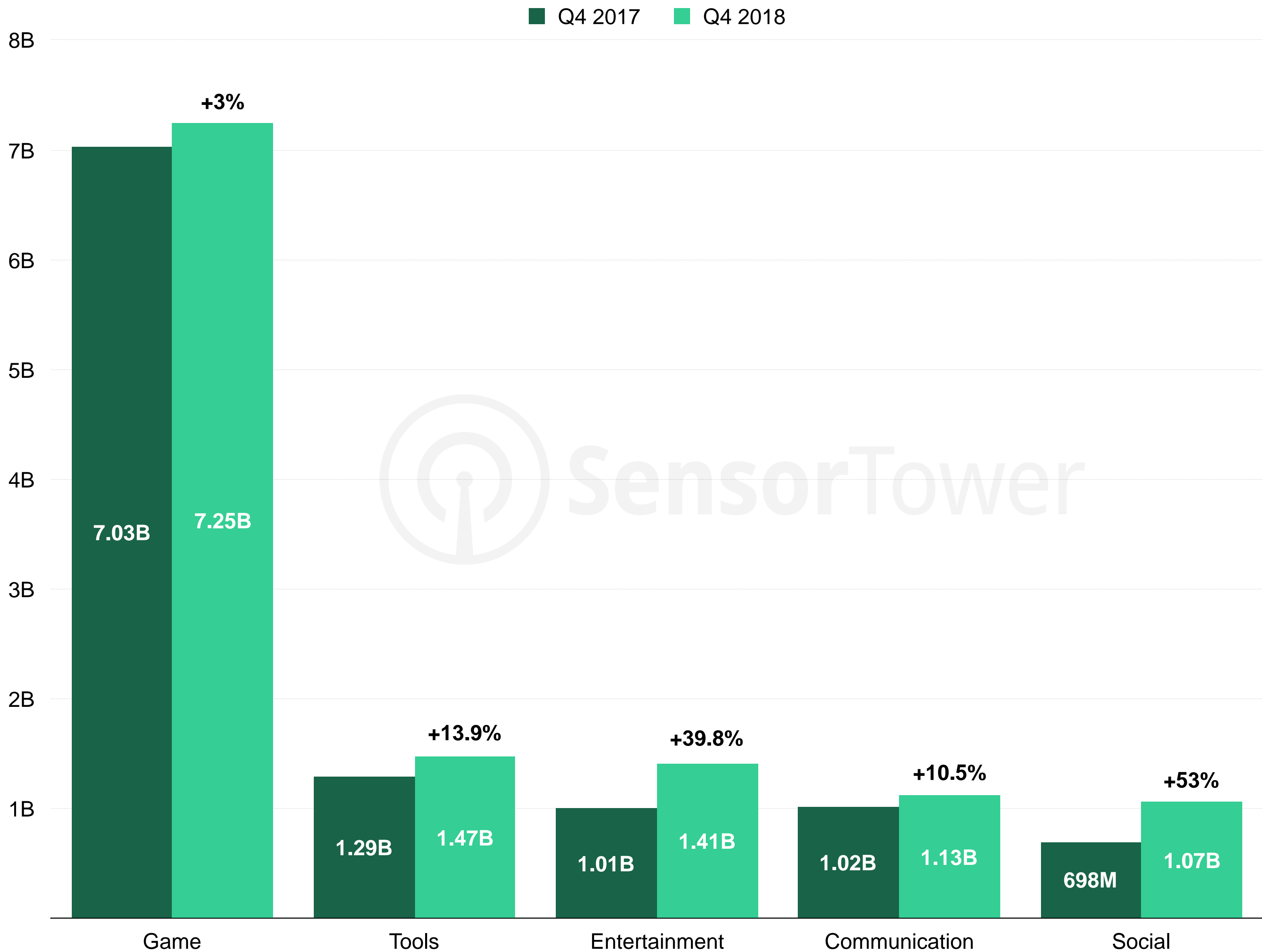
App Store games downloads fell 1.3% year-over-year, with 2.09 billion in the quarter. This was the lowest quarter for games downloads since Q2 2017.

Shopping replaced social networking among the top five in Q4. 11% year-over-year growth helped the category reach an all-time high in the quarter.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Oct. 1 through Dec. 31, 2018. Apple apps are excluded. We report unique installs only (one download per User).

Google Play ▶ Q4 Categories by Worldwide Downloads

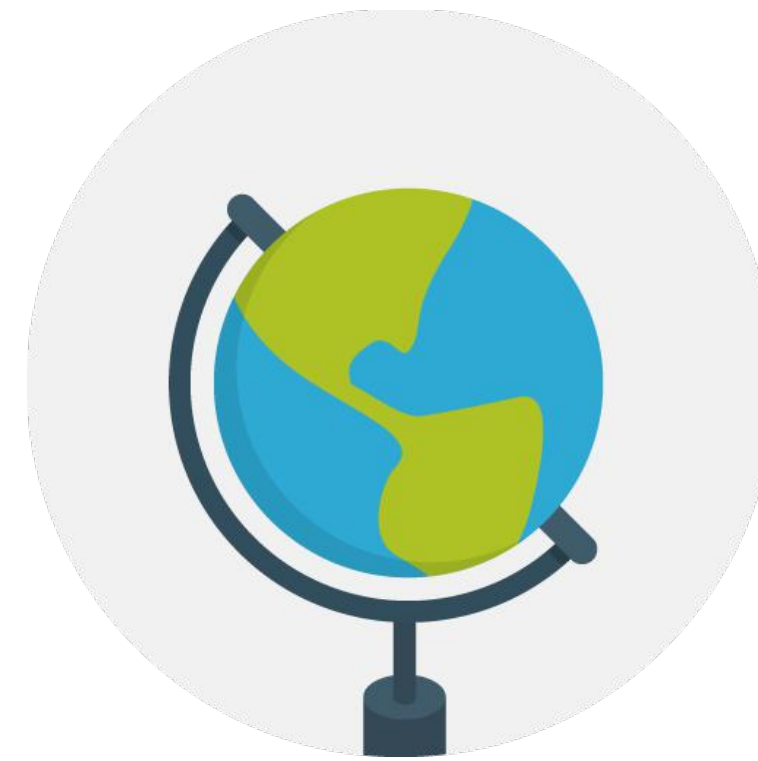


Games saw modest growth on Google Play in 2018. Game downloads made up 36% of the Google Play Store in Q4 2018, down from 40% in Q4 2017.

The Social category grew 53% year-over-year, surpassing Photography apps to take the No. 5 spot. This change was driven by growth of social apps in India, particularly TikTok.

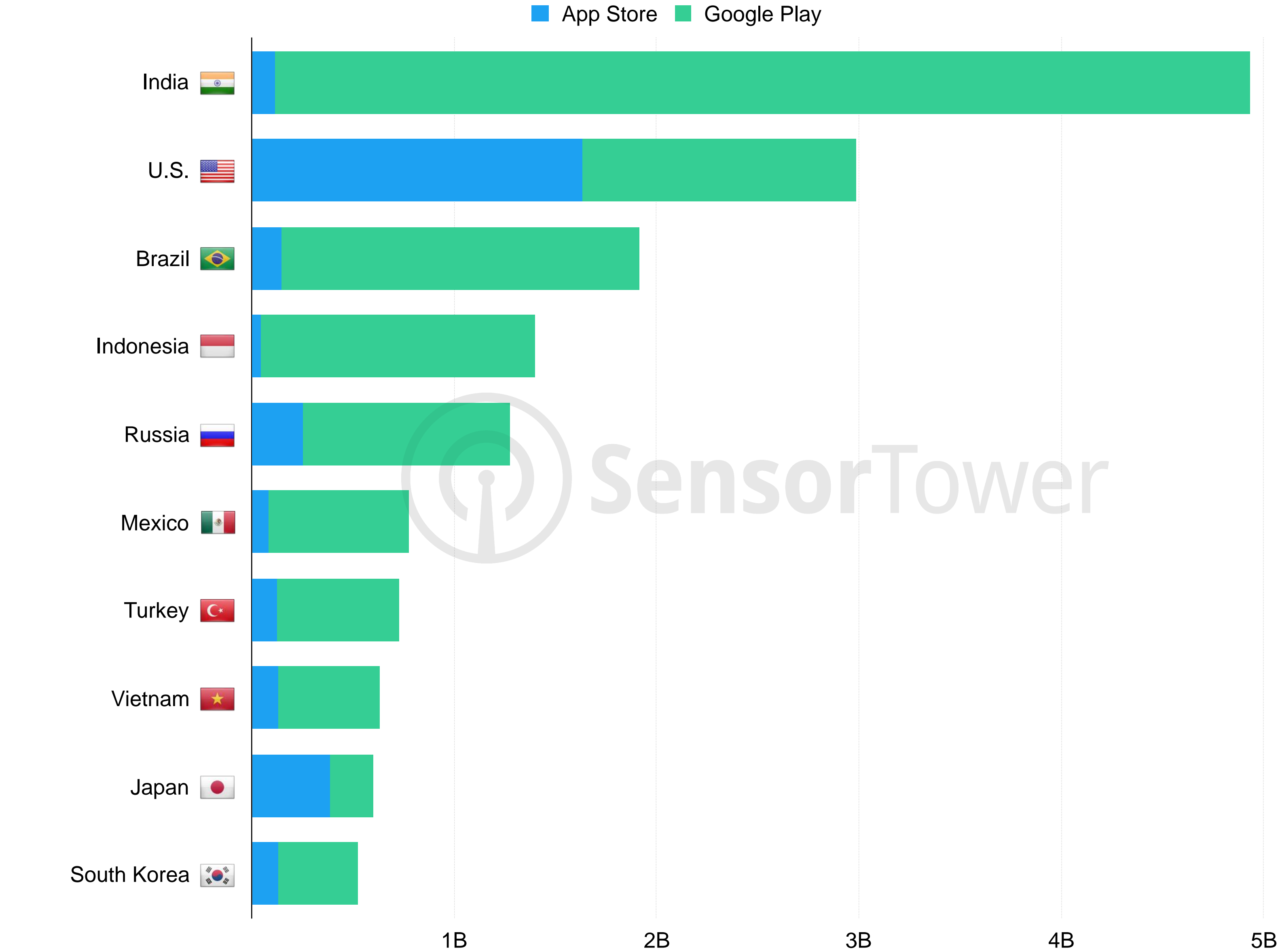
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Top Countries

Overall ▶ Q4 Countries by Worldwide Downloads



Downloads in India reached nearly five billion in Q4 2018, an increase of more than one billion year-over-year. Almost 98% of India’s downloads were from Google Play.

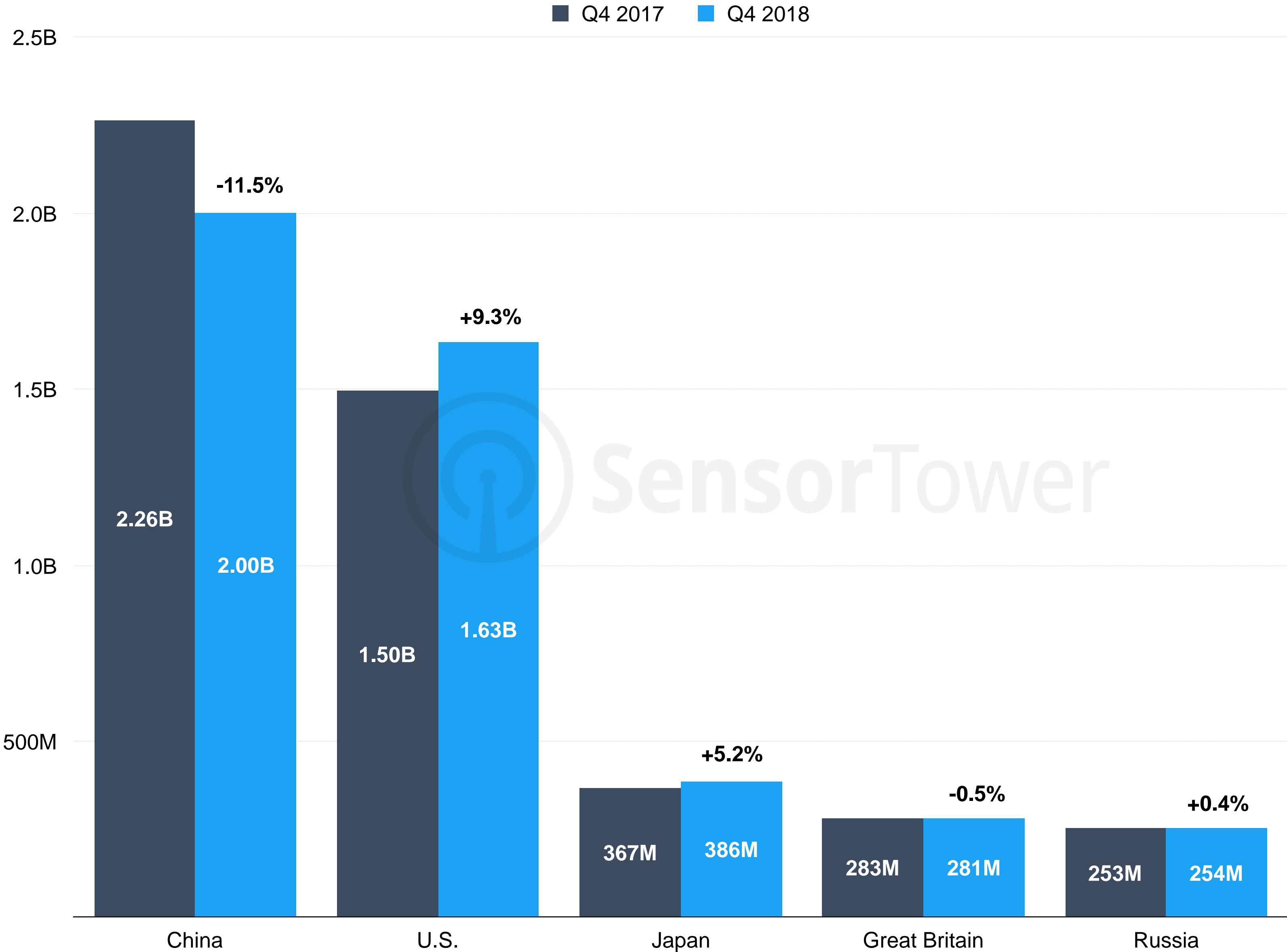
The top 10 countries were the same as the previous quarter. Once again, the U.S. and Japan were the only countries with the majority of their downloads coming from the App Store

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for iPhone and iPad for Oct. 1 through Dec. 31, 2018. 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 ▶ Q4 Countries by Worldwide Downloads



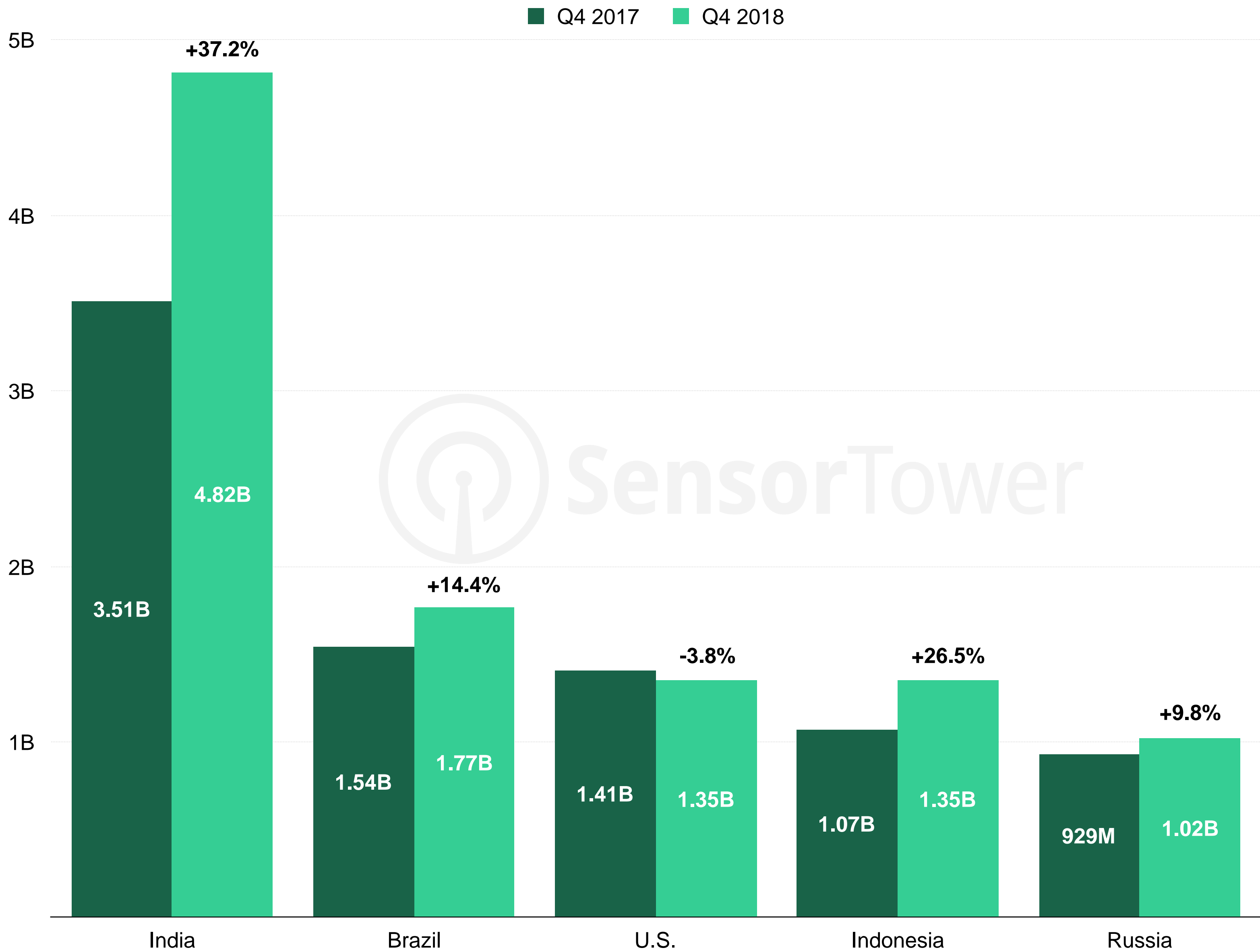
China downloads fell to two billion, its lowest quarter in three years. The gap between China and the U.S. was 368M in Q4 2018, less than half of the 766M gap from a year prior.

The rest of top five countries were the same as the in 3Q18. Japan installs grew 5.2% year-over-year, while Great Britain and Russia totals were similar to the prior year.

Note Regarding Download Estimates

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Google Play ▶ Q4 Countries by Worldwide Downloads



India’s growth on Google Play continued into the end of 2018.

Downloads reached 4.82 billion, up 37% year-over-year and 6% quarter-over-quarter.

U.S. and Brazil install totals moved in opposite directions in Q4.

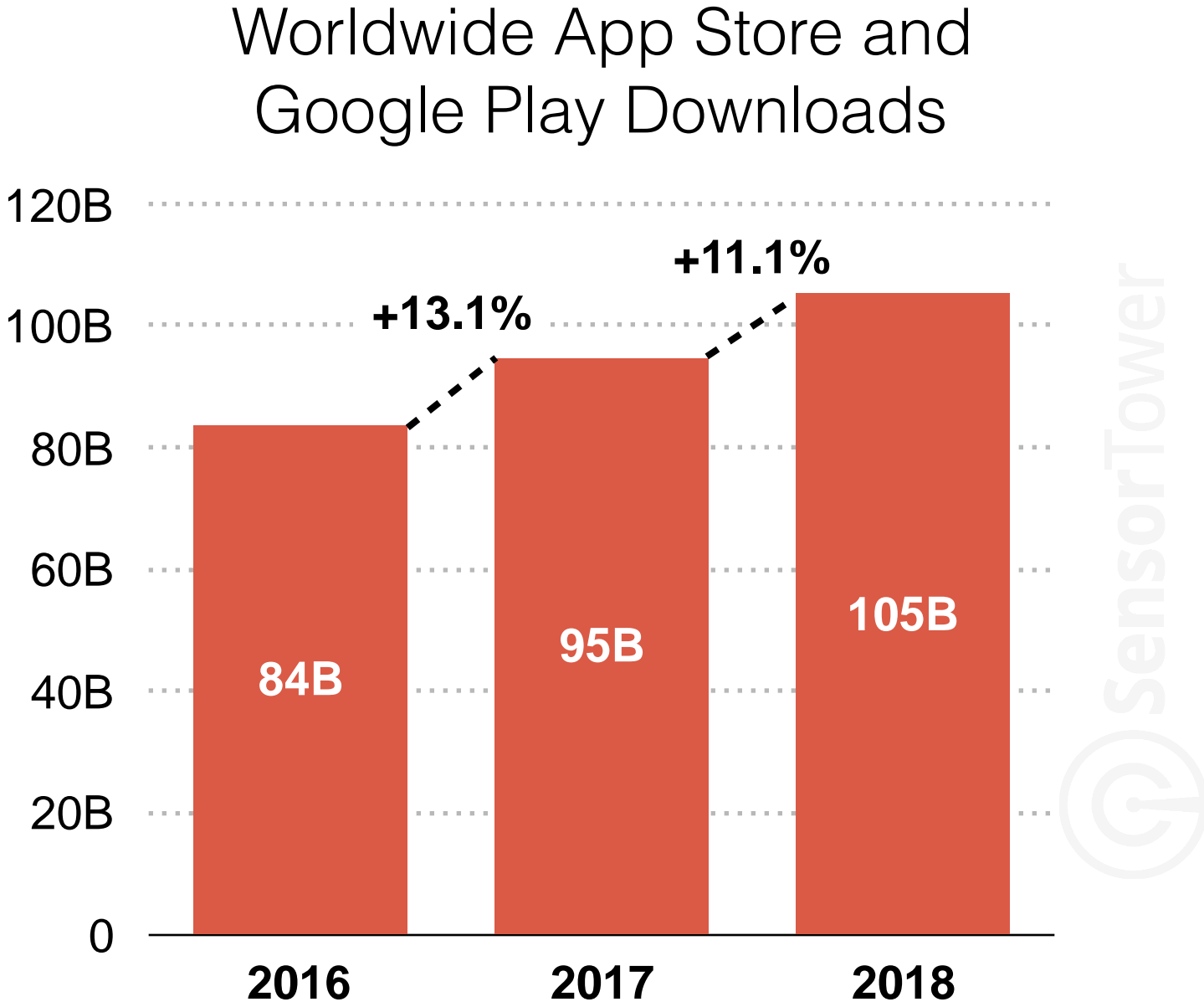
Brazil downloads grew 14%, increasing the gap between the two countries to 412M in the quarter.

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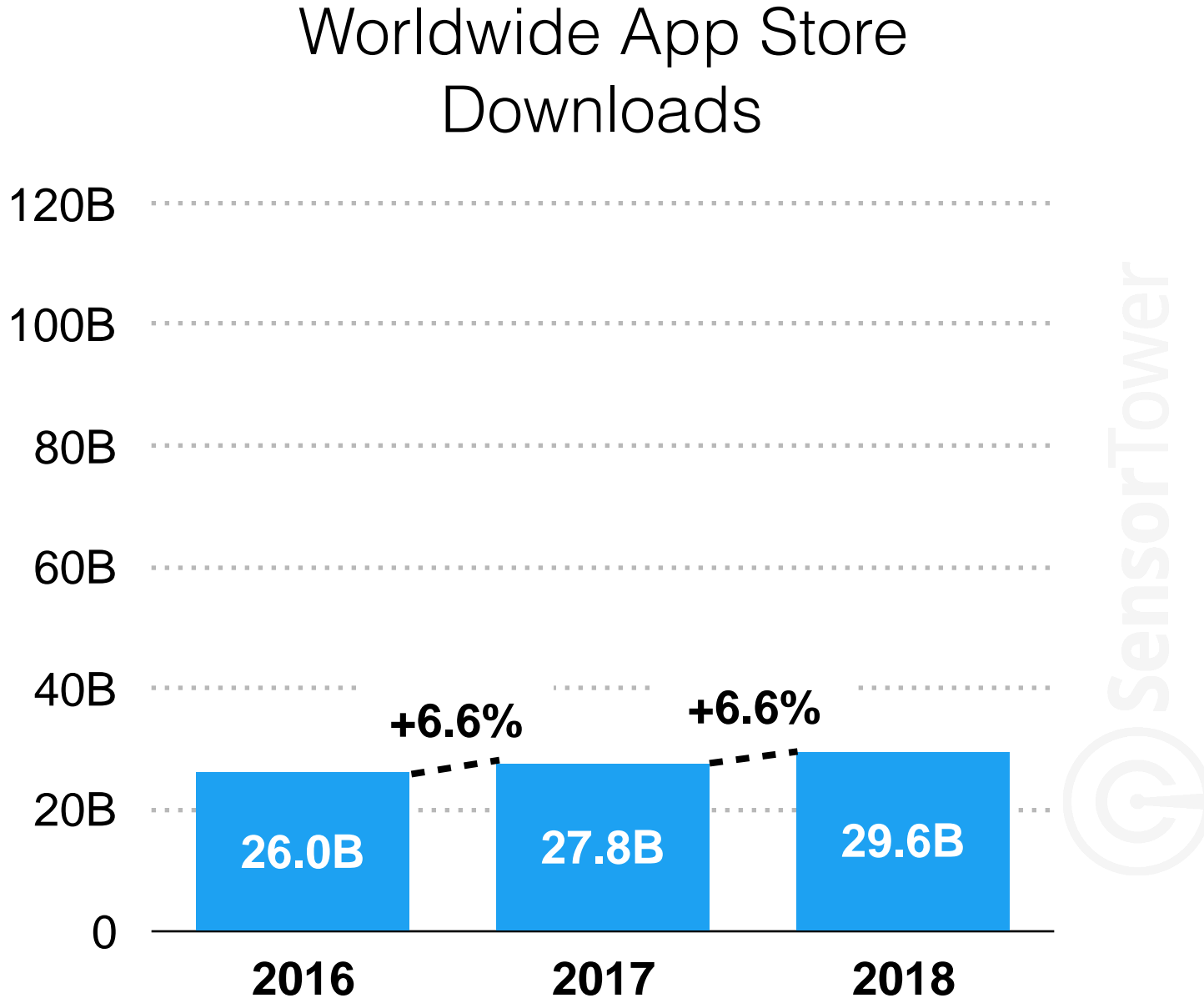


2018 Year In Review



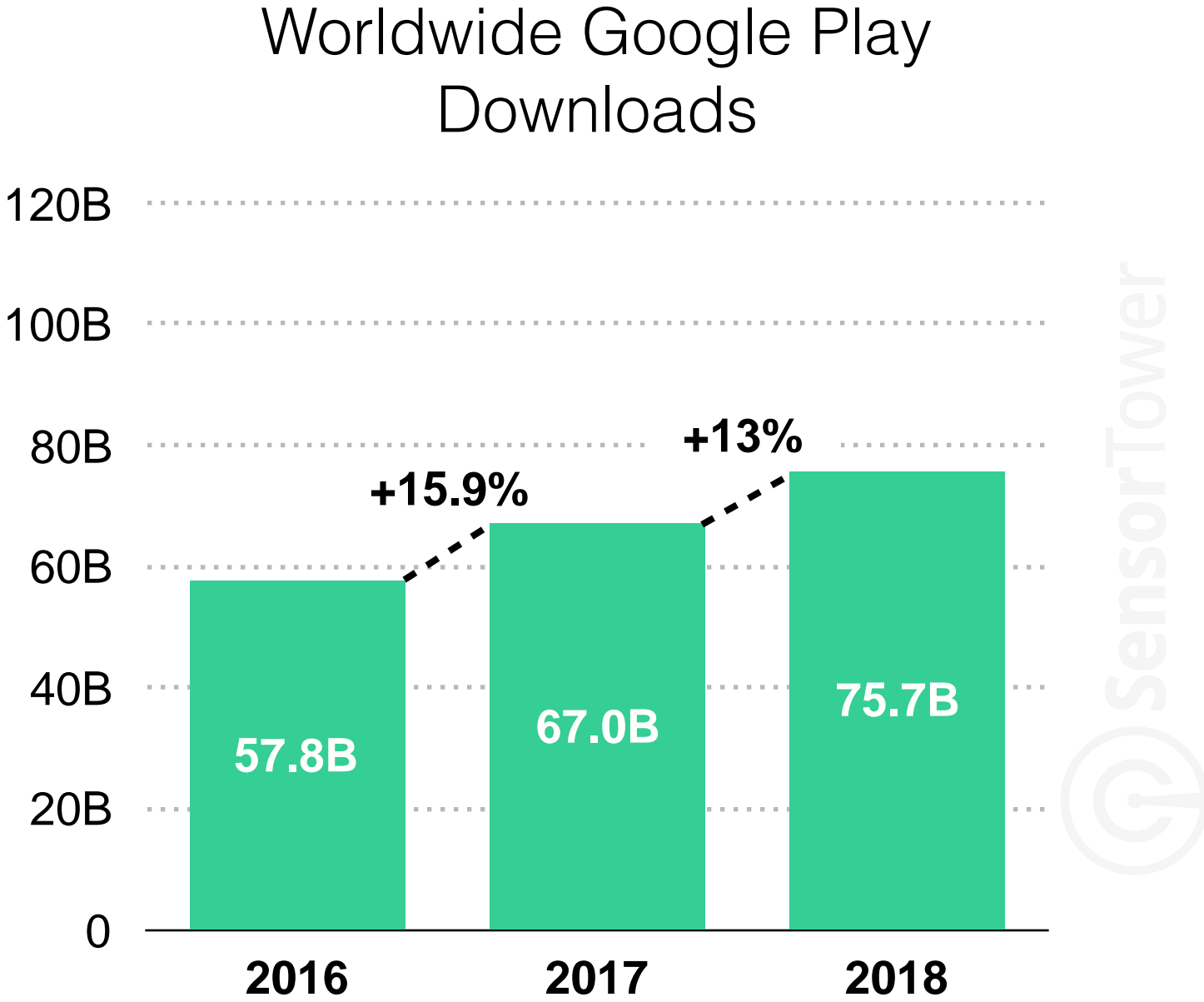
105 Billion

App Store + Google Play Downloads



29.6 Billion

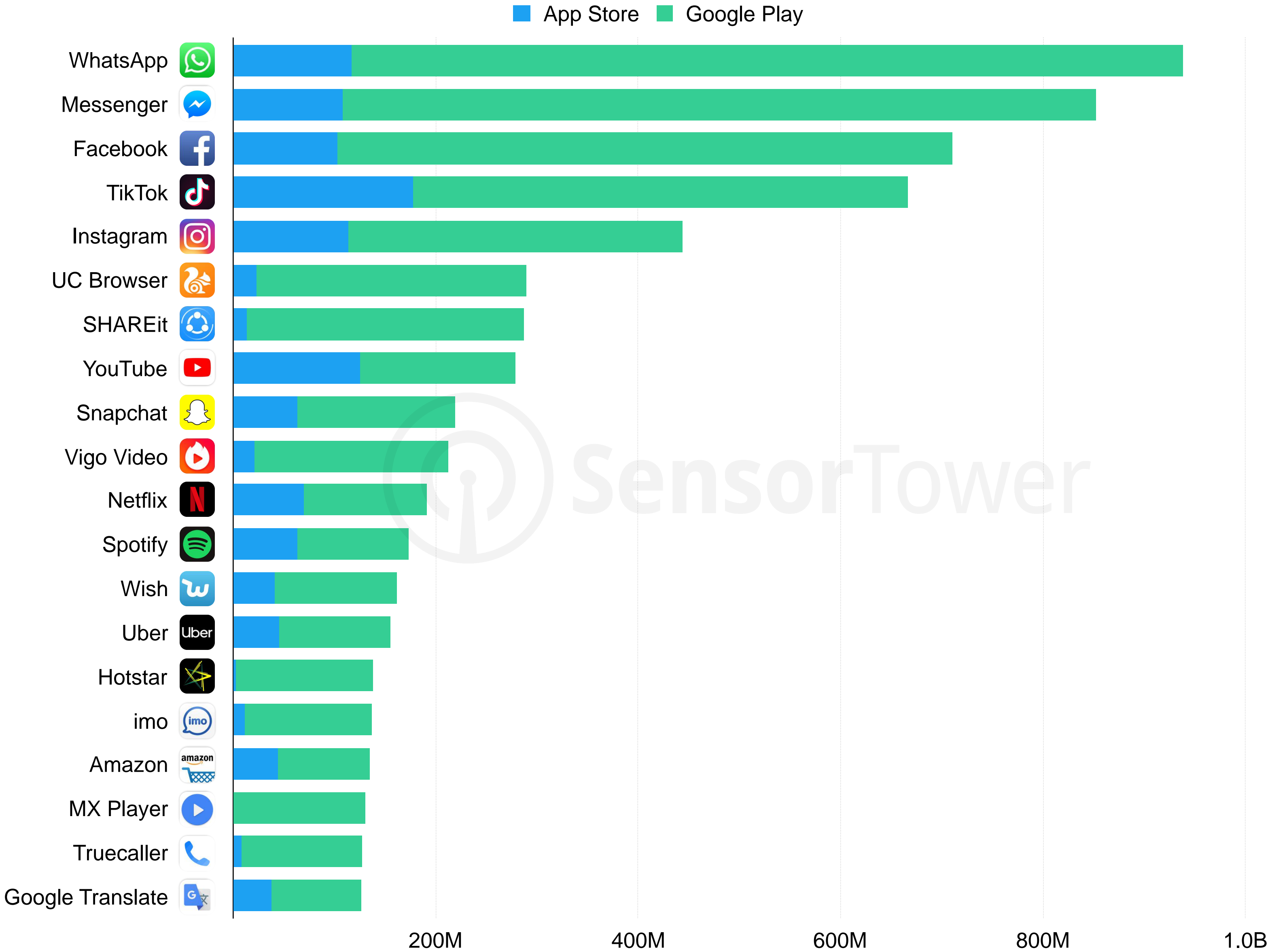
App Store Downloads



75.7 Billion

Google Play Downloads

Top Apps ▶ 2018 Worldwide Downloads



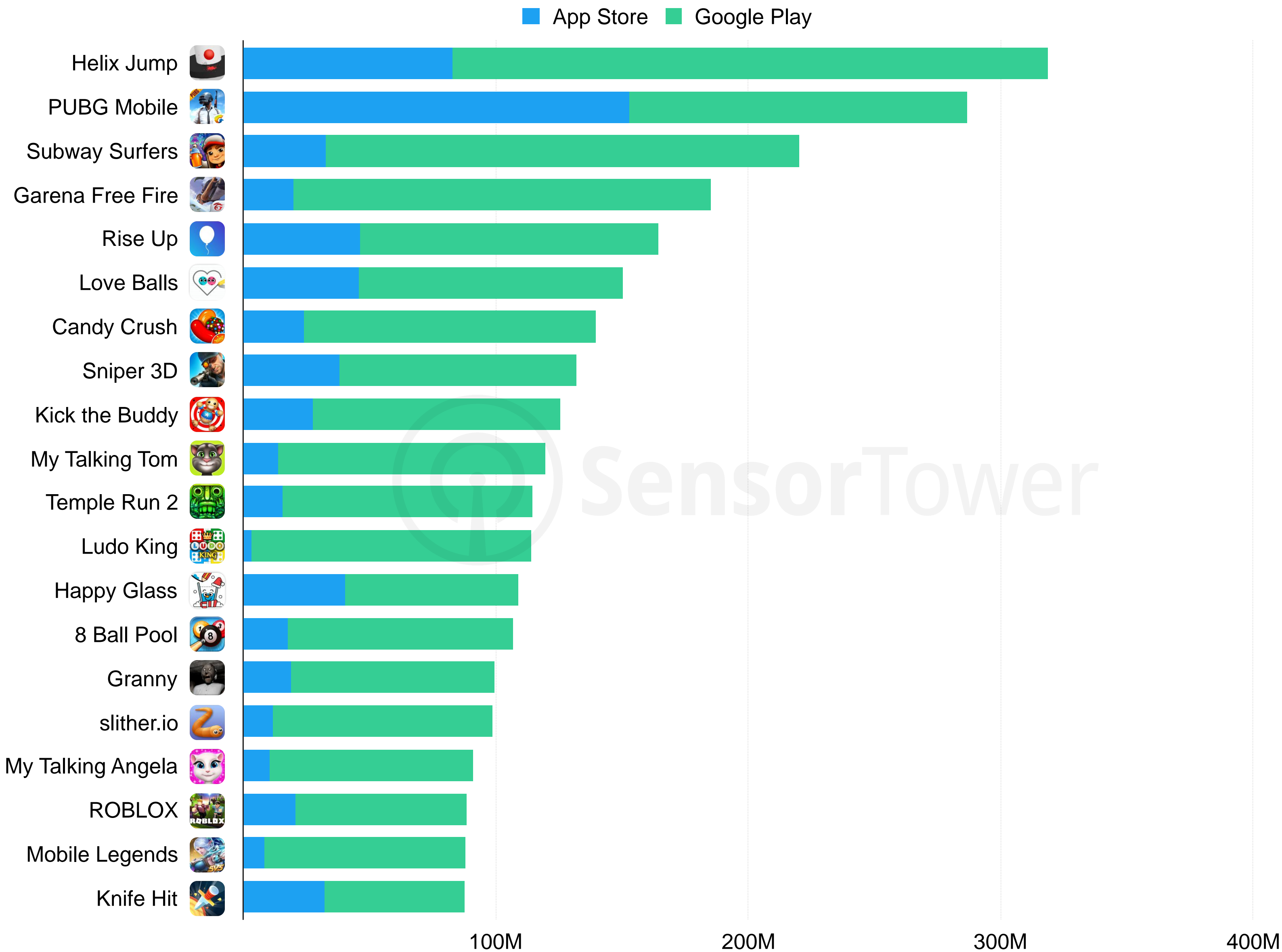
Facebook’s WhatsApp, Messenger, and Facebook were the top downloaded apps in 2018. Facebook had four of the top five apps with Instagram as the No. 5 app.

TikTok, formerly musical.ly in the U.S., had more than 660M downloads in 2018. With fewer than 130M downloads in 2017, this represented a 416% increase.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1 through Dec. 31, 2018. Apple apps and Google pre-installed apps are excluded. We report unique installs only. Android estimates do not include third-party stores. Figures represent aggregate installs of all app versions, ex: Facebook and Facebook Lite.

Top Games ▶ 2018 Worldwide Downloads



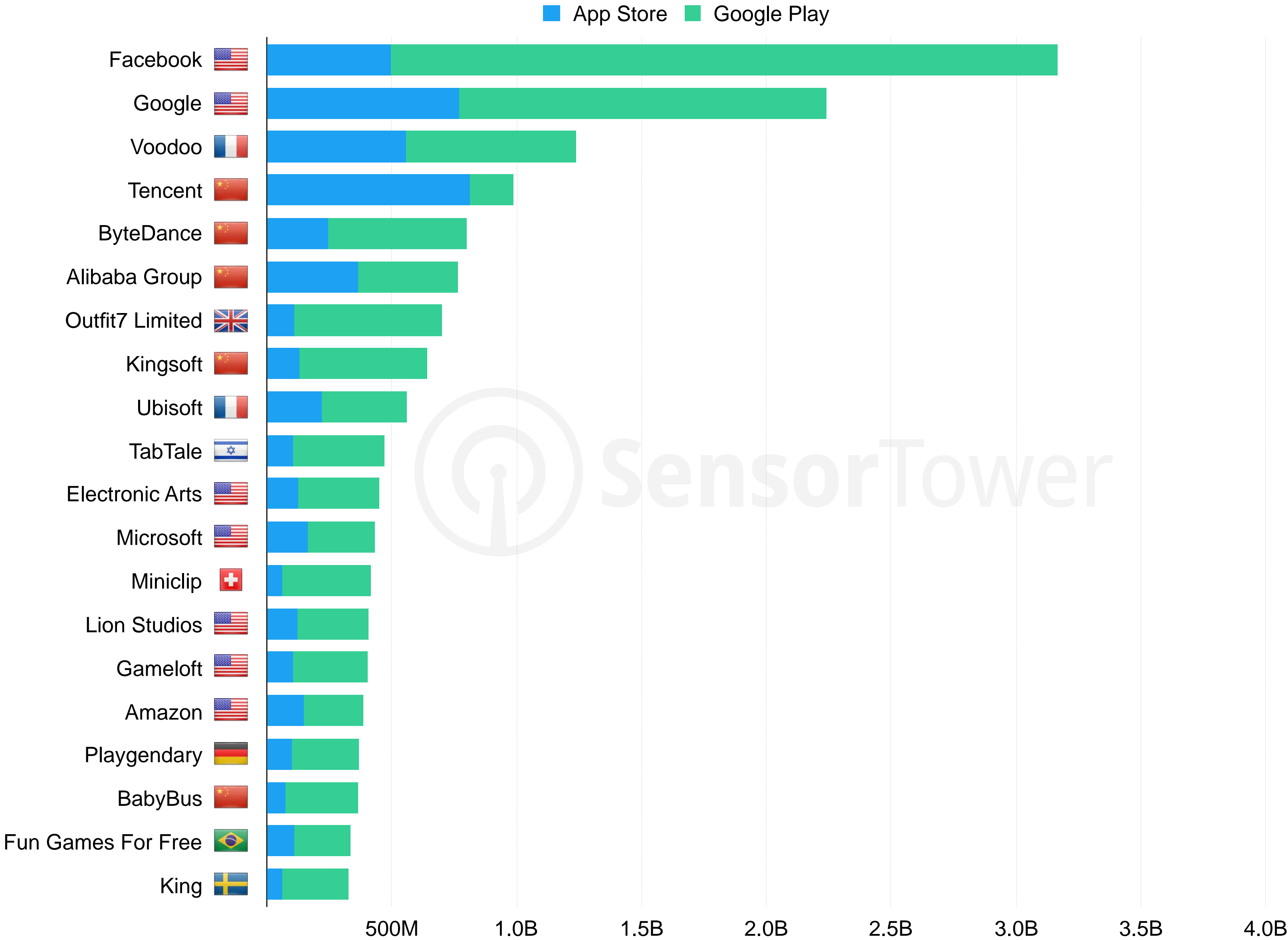
Released in February, Voodoo’s hyper-casual game Helix Jump was the top game in 2018. Other new hyper-casual games among the top 10 included Rise Up and Love Balls.

PUBG Mobile, a battle royale game by Tencent, was the No. 2 game in 2018. 29% of its installs were from China, with India and the U.S. each contributing about 10%.

Note Regarding Download Estimates

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Top Publishers ▶ 2018 Worldwide Downloads



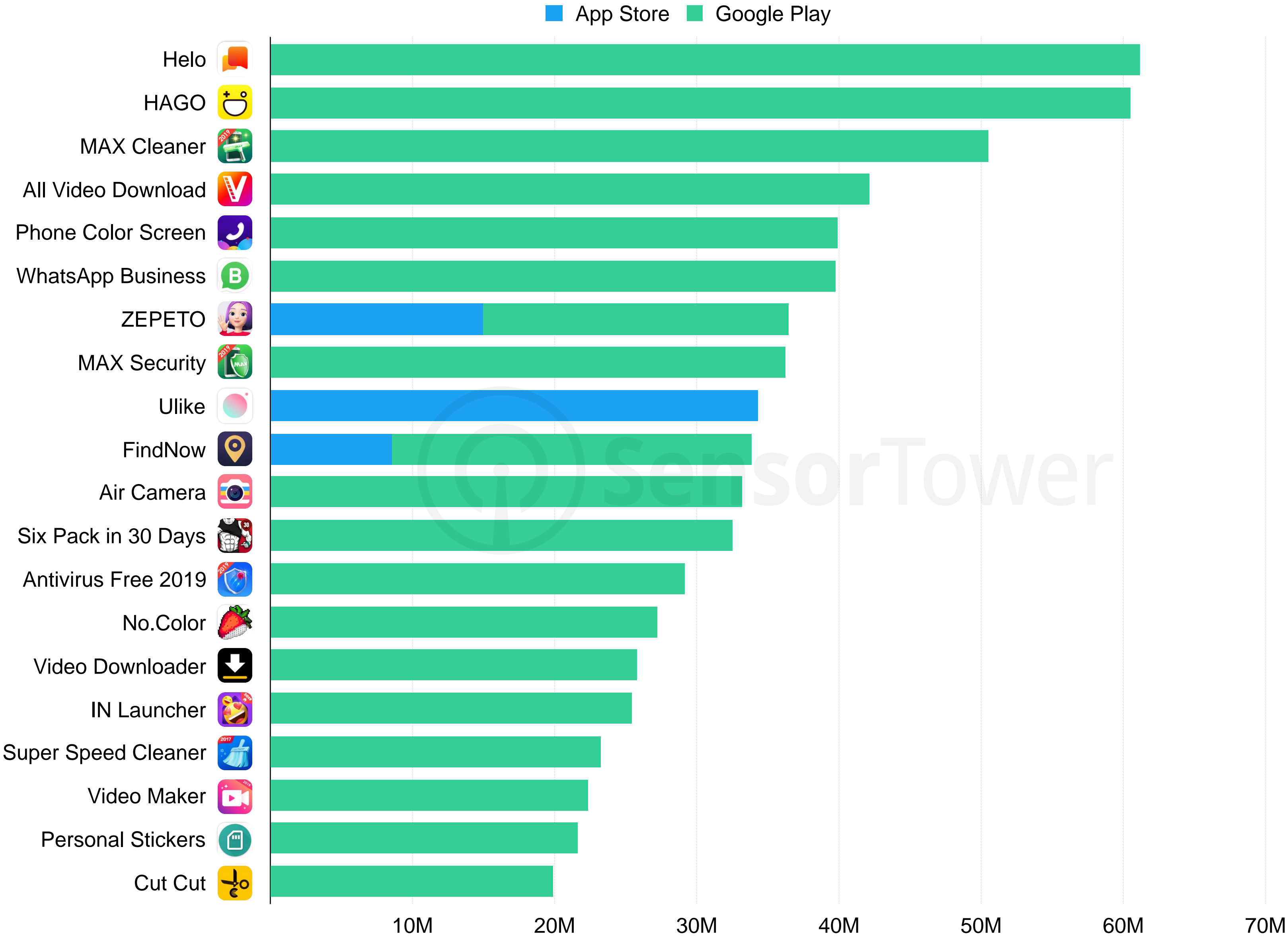
Facebook and Google were again the top two publishers in 2018. Facebook surpassed 3B downloads for the third straight year, while Google reached 2B for the first time.

France-based games publisher Voodoo gained nearly one billion installs in 2018 to take the No. 3 spot. It was only the No. 25 publisher a year prior.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1 through Dec. 31, 2018. Apple apps and Google pre-installed apps are excluded. We report unique installs only. Android estimates do not include third-party stores. Figures represent aggregate installs of all app versions, ex: Facebook and Facebook Lite.

Top New Apps ▶ 2018 Worldwide Downloads



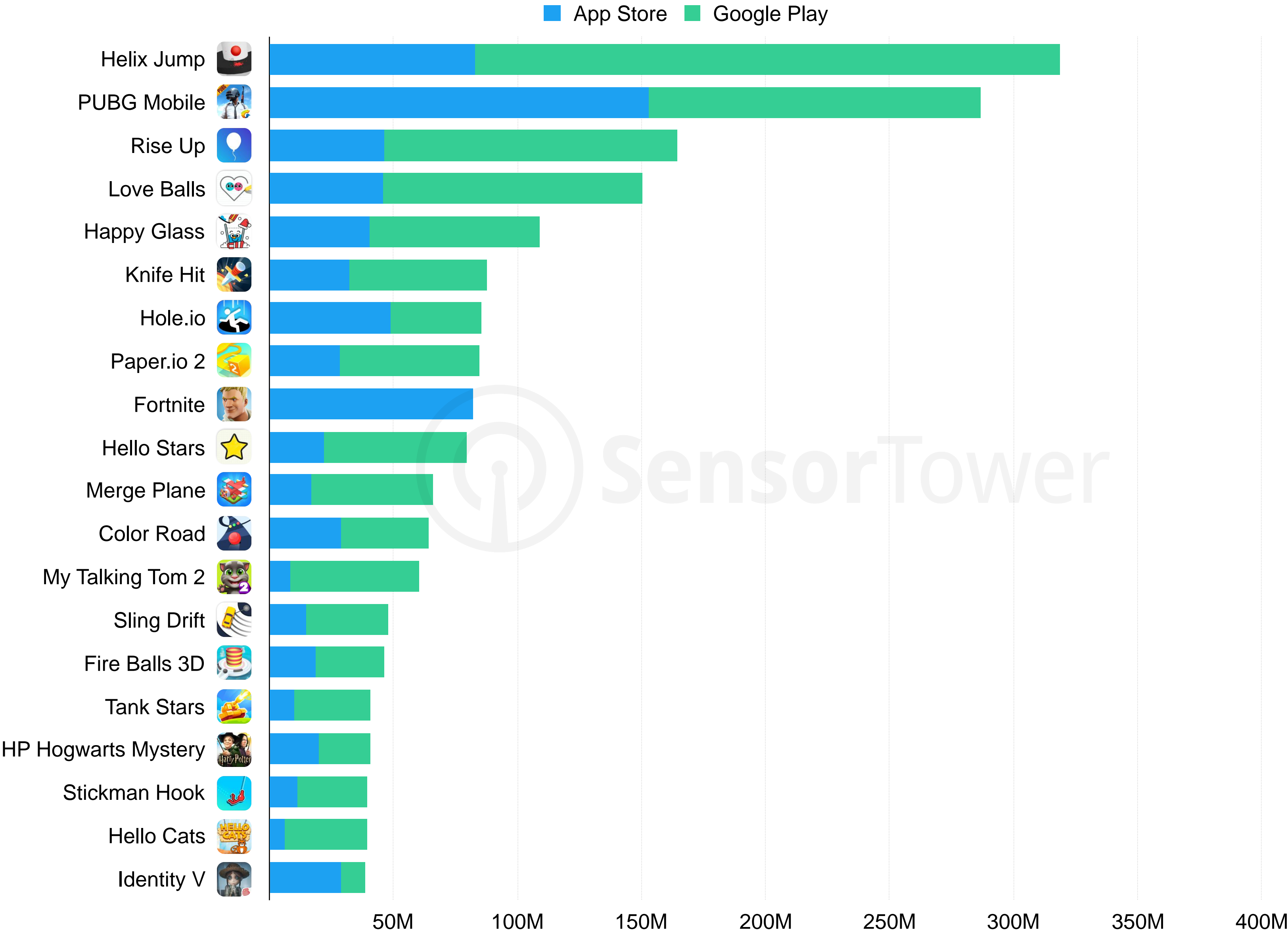
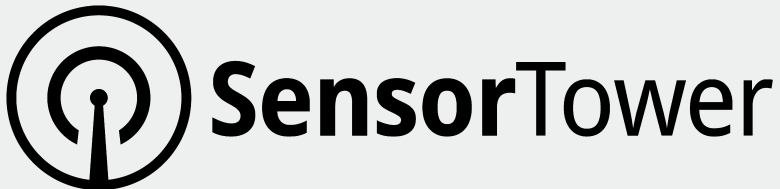
Helo, a social app in India, reached 60 million installs after launching in June 2018. It had 18 million downloads in October alone and was India’s third largest app that month.

Top new apps in 2018 were successful in Google Play’s largest markets. India was the largest country for 10 of the top 20 new apps, and Brazil was the largest for another six.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1 through Dec. 31, 2018. Apple apps and Google pre-installed apps are excluded. We report unique installs only. Android estimates do not include third-party stores. Figures represent aggregate installs of all app versions, ex: Facebook and Facebook Lite.

Top New Games ▶ 2018 Worldwide Downloads



New hit battle royale games in 2018 included PUBG Mobile and Fortnite.

Tencent’s PUBG Mobile and Epic Games’ Fortnite were the No. 1 and 3 new App Store games, respectively.

Voodoo had five of the top 20 new games.

Voodoo games Hole.io (No. 7), Paper.io 2 (No. 8), Color Road (No. 12), and Fire Balls 3D (No. 15) joined the top new game Helix Jump.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1 through Dec. 31, 2018. Apple apps and Google pre-installed apps are excluded. We report unique installs only. Android estimates do not include third-party stores. Figures represent aggregate installs of all app versions, ex: Facebook and Facebook Lite.



Top 5 Stories of the Year



#1: TikTok



TikTok

No app rose to prominence in 2018 quite like TikTok, the short-form video app. TikTok began 2018 by becoming the most downloaded app in China in the first quarter, and expanded its success into other markets like India and the United States later in the year.

Key Stats:












- Ranked No. 1 in worldwide App Store downloads in 2018.
- Ranked No. 4 in worldwide downloads in 2018 across App Store and Google Play, with more than 650 million installs.
- Was the second most downloaded app in the U.S. in 4Q18 after its parent company, ByteDance, merged TikTok with musical.ly in August.


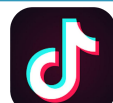









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TikTok ▶ Top Apps in 2018

Top Apps in 2018 by Downloads

 U.S.		vs. 2017
1	 Messenger Facebook	-
2	 Facebook Facebook	+2
3	 Netflix Netflix	+3
4	 Instagram Facebook	+1
5	 Snapchat Snap	-3
6	 TikTok ByteDance	+18
7	 Bitmoji Snap	-4
8	 Spotify Spotify	-
9	 Wish ContextLogic	-2
10	 YouTube Google	+1

 China		vs. 2017
1	 TikTok ByteDance	+25
2	 iQiyi iQiyi	+3
3	 Pinduoduo Shanghai Xunmeng	+5
4	 Tencent Video Tencent	-3
5	 WeChat Tencent	-3
6	 Taobao Alibaba Group	-1
7	 QQ Tencent	-4
8	 Youku Alibaba Group	-1
9	 Alipay Alibaba Group	-3
10	 Xiaohongshu Xingin	+45

 India		vs. 2017
1	 WhatsApp Facebook	-
2	 Messenger Facebook	-
3	 TikTok ByteDance	+102
4	 UC Browser Alibaba Group	-
5	 Facebook Facebook	-2
6	 Vigo Video ByteDance	+209
7	 SHAREit SHAREit Technologies	-1
8	 Hotstar Novi Digital	-3
9	 MX Player J2 Interactive	-2
10	 Truecaller True Software Scandanavia	-

TikTok flew up the charts in the three largest mobile markets. It was China’s most downloaded app in 2018, and was also among the top 10 in India and the U.S.

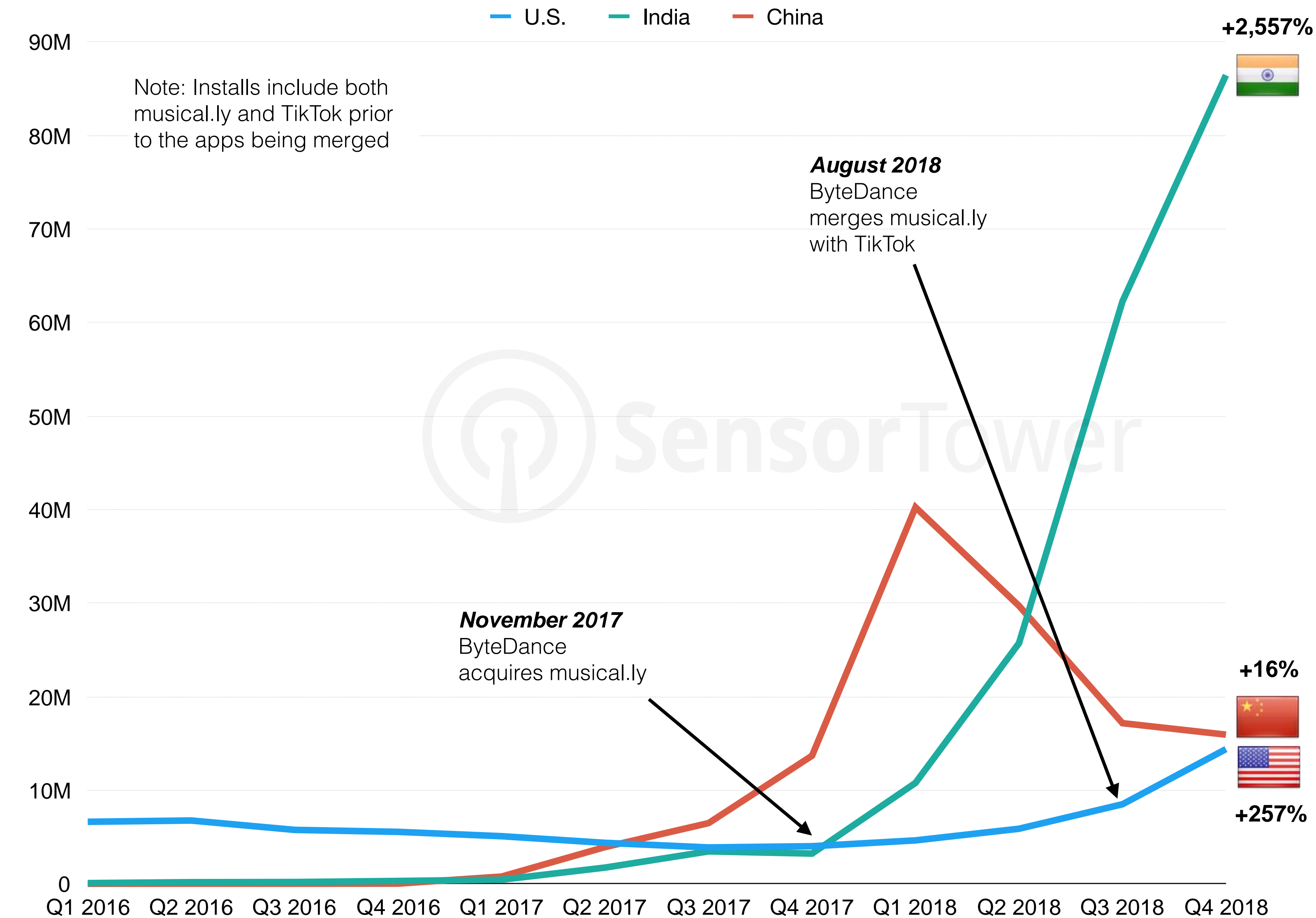
Most of the top apps in 2018 were also top apps in 2017, with TikTok as a notable exception. Vigo Video, also owned by ByteDance, improved 209 spots in India to enter the top 10.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for App Store and Google Play for Jan. 1, 2018 through Dec. 31, 2018. We report unique installs only (one download per User). Google pre-installed 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.

TikTok ▶ Downloads by Country

Quarterly downloads for TikTok by country, App Store and Google Play



TikTok's rapid ascent was driven largely by India, with Q4 downloads up 2,557% year-over-year.

Meanwhile, the app saw its China installs peak in March.

ByteDance acquired musical.ly in November of 2017 and merged TikTok and musical.ly this past August. Since the apps merged, monthly U.S. installs increased by more than 100%.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for App Store and Google Play for Jan. 1, 2016 through Dec. 31, 2018. We report unique installs only (one download per User). Google pre-installed 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.



#2: Fortnite



Fortnite

Battle royale games made the transition to mobile in the U.S. in 2018, including Fortnite and PUBG Mobile. Fortnite was not only the highest earning game on the U.S. App Store in 2018, but it also had one of the best years ever for any mobile game.

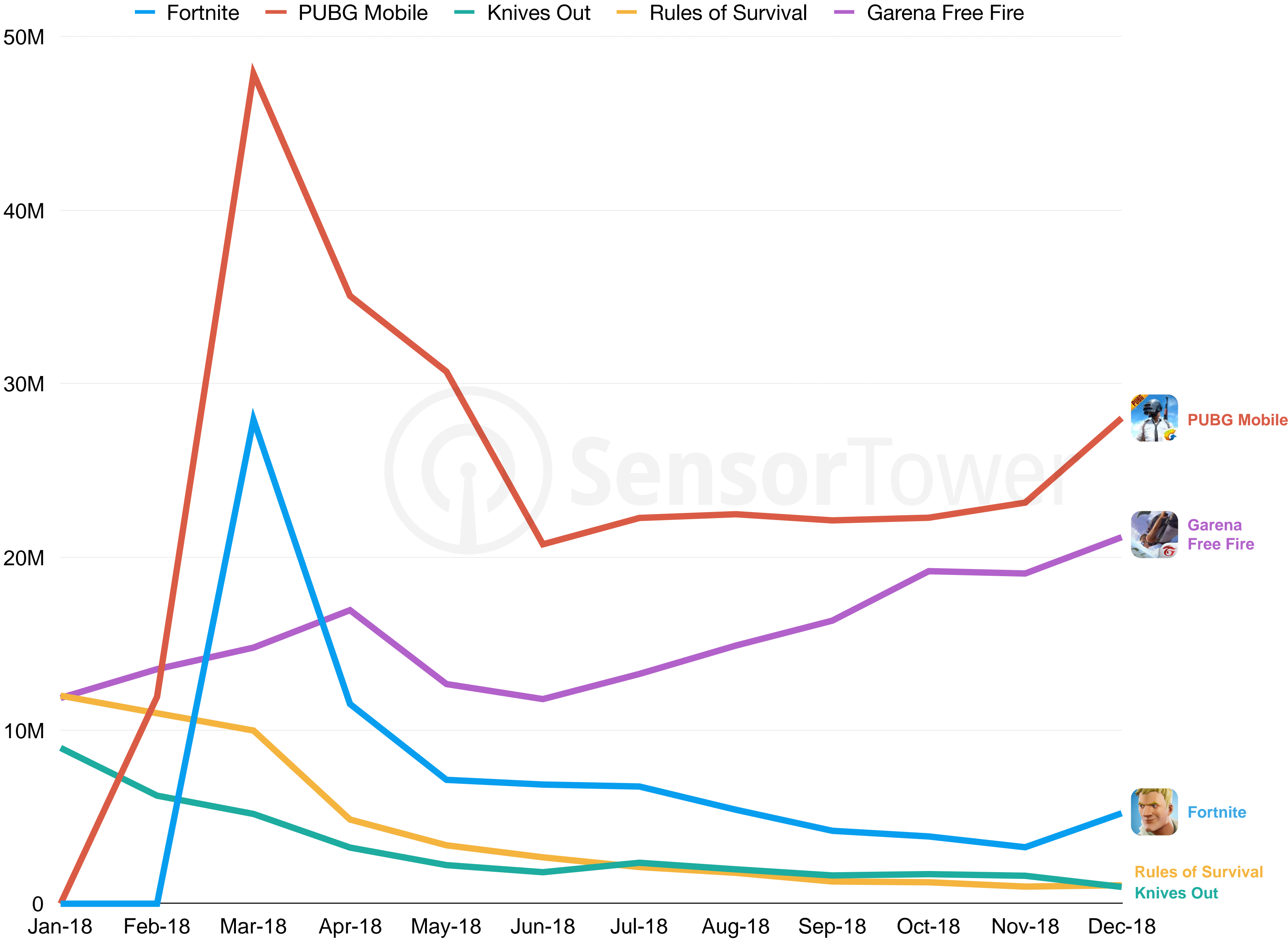
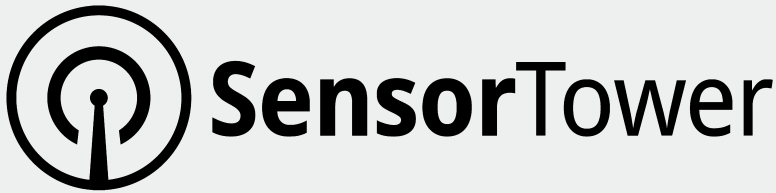
Key Stats:

- Ranked No. 1 among games in U.S. App Store installs and revenue in 2018.
- Had its best month of 2018 in December, grossing more than \$40 million in the U.S. App Store.
- Fortnite grossed just short of half a billion dollars in 2018, earning more than \$450 million on iOS.

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Battle Royale ▶ Worldwide Downloads in 2018



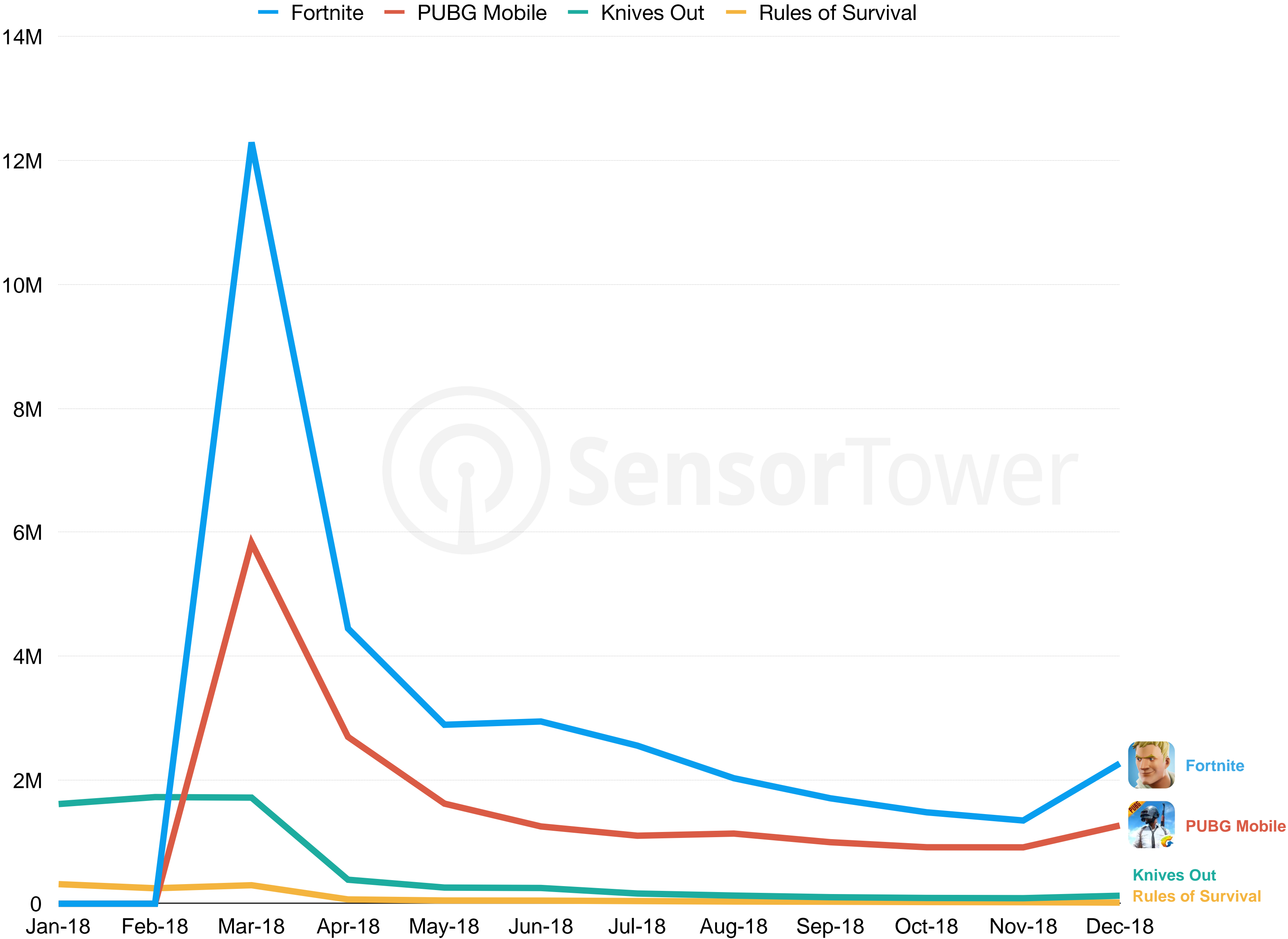
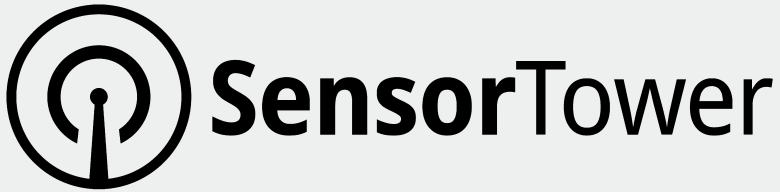
PUBG Mobile was the top installed battle royale game in 2018. Garena Free Fire had 100M fewer installs, but saw an encouraging trend at the end of the year.

Fortnite’s had 82M installs in 2018, 200M behind PUBG Mobile and 100M behind Garena Free Fire. Fortnite’s total only includes iOS downloads as it is not on Google Play.

Note Regarding Download Estimates

Our estimates include worldwide daily download totals for App Store and Google Play for Jan. 1 through Dec. 31, 2018. We report unique installs only (one download per User). Android download estimates do not include third-party stores. Figures represent aggregate installs of all app versions, ex: Facebook and Facebook Lite.

Battle Royale ▶ U.S. App Store Downloads in 2018



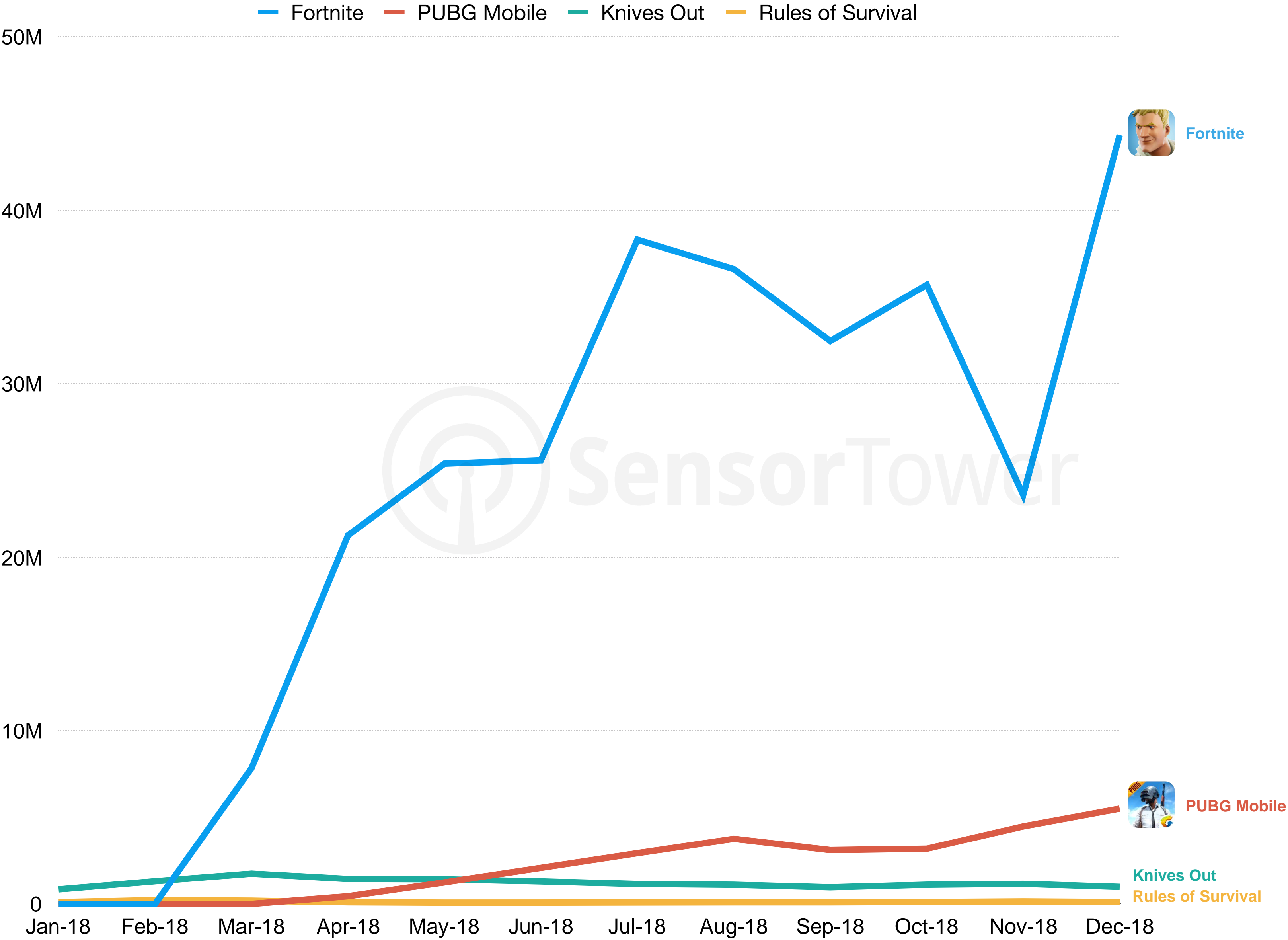
Fortnite and PUBG Mobile were the top two games in U.S. downloads when they launched in March. Only Helix Jump had more App Store and Google Play installs in 2018.

Fortnite’s 34M U.S. installs in 2018 exceeded PUBG Mobile’s 30M across App Store and Google Play, despite of the fact that Fortnite was only available on the App Store.

Note Regarding Download Estimates

Our estimates include U.S. daily download totals for App Store for Jan. 1, 2016 through Dec. 31, 2018. We report unique installs only (one download per User). Google pre-installed apps are excluded. Figures represent aggregate installs of all app versions, ex: Facebook and Facebook Lite.

Battle Royale ▶ U.S. App Store Revenue in 2018



Fortnite dominated the U.S. battle royale space in 2018. While it had only about twice as many U.S. App Store downloads as PUBG Mobile, it had more than 10 times the revenue.

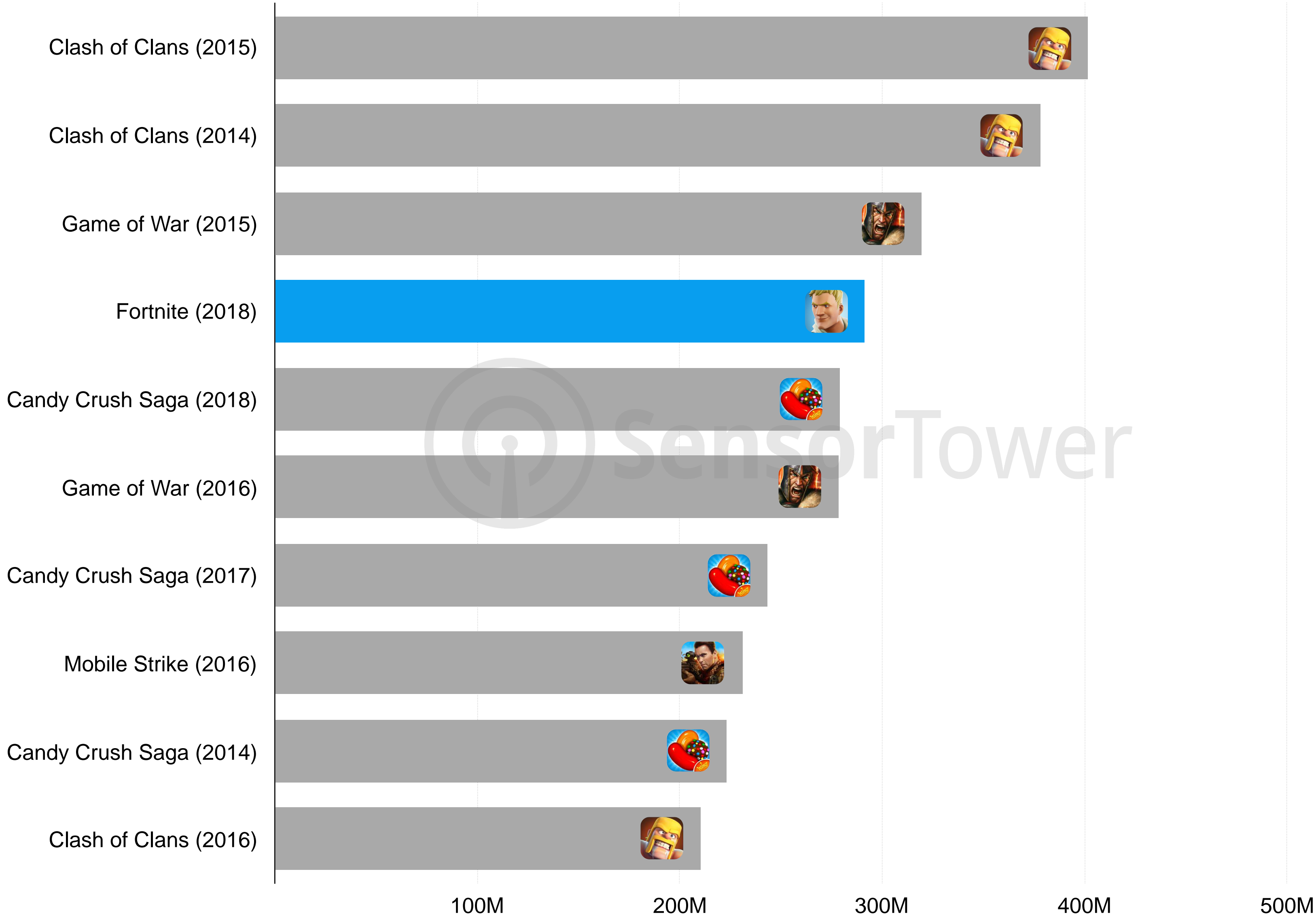
Knives Out from NetEase was a close second in worldwide App Store revenue. Its revenue peaked in November at \$40M, with more than 75% of that from Japan.

Note Regarding Revenue Estimates

Our estimates include U.S. daily revenue totals for App Store for Jan. 1 through Dec. 31, 2018. We report gross revenue (including the cut for Apple). Figures represent aggregate revenue of all app versions, ex: Facebook and Facebook Lite.

Fortnite ▶ Games Grossing 200M Revenue

Yearly U.S. App Store gross revenue (since 2014)



Fortnite was the fifth game since 2014 to earn more than \$200M in a calendar year. It was the only game to hit this mark despite having been available for only part of the year.

Fortnite will be looking to repeat its success in the U.S. App Store in 2019. Clash of Clans and Candy Crush have each grossed more than \$200M in three separate years.

Note Regarding Revenue Estimates

Our estimates include U.S. daily revenue totals for App Store for Jan. 1, 2014 through Dec. 31, 2018. We report gross revenue (including the cut for Apple). Figures represent aggregate revenue of all app versions, ex: Facebook and Facebook Lite.



#3: Netflix



Netflix

Excluding games, Netflix was the top earning app in 2018. Its decision to remove the ability to sign up through the App Store app (and thus avoid the 30% cut taken by Apple) will attract even more attention to its revenue, as Apple earns a considerable amount of revenue through platform feeds for subscription streaming services.

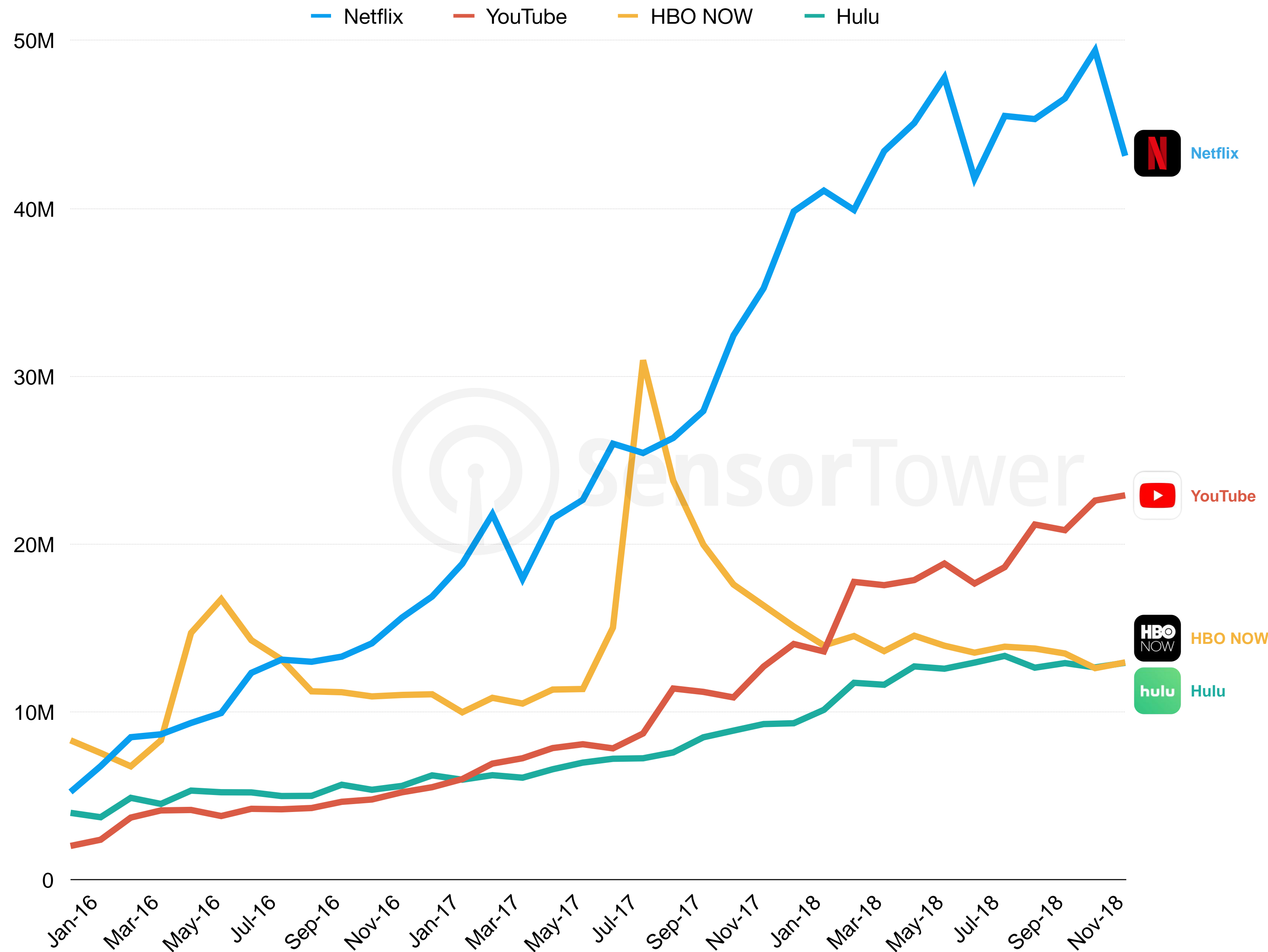
Key Stats:

- Ranked No. 11 worldwide and No. 3 in U.S. downloads in 2018 across the App Store and Google Play.
- Was the No. 1 grossing non-game in 2018, both worldwide and in the U.S.
- Netflix grossed more than \$40 million in the U.S. in eight different months in 2018. The only other app to earn that much in a month was Fortnite, which passed that threshold once.

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Netflix ▶ U.S. Revenue - App Store and Google Play



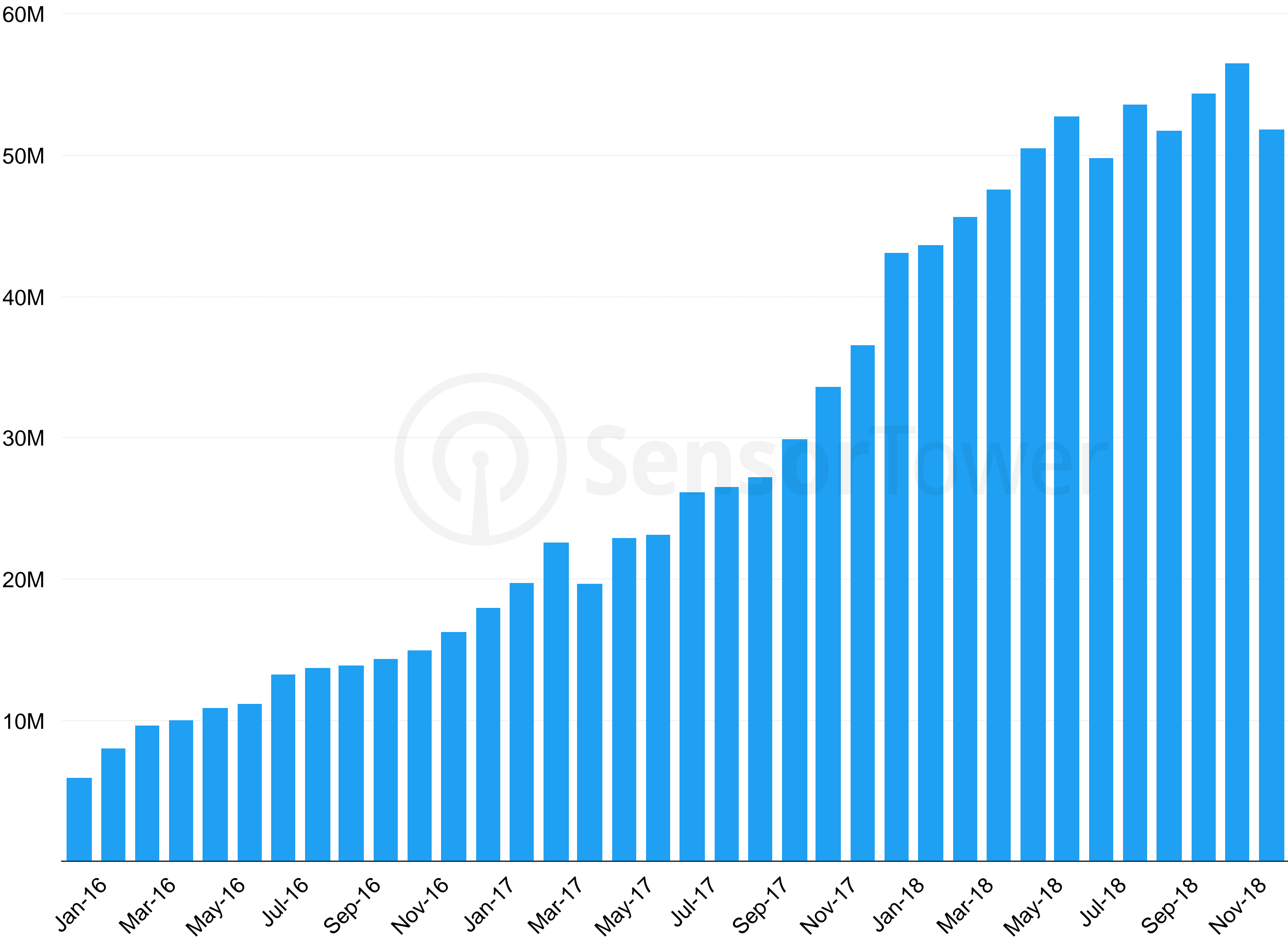
Subscription revenue continued to rise in 2018, with Netflix leading the way. Subscription video on-demand (SVOD) apps like Netflix, YouTube, and Hulu saw significant growth.

Only Candy Crush Saga had higher U.S. revenue in 2018 than Netflix, across the App Store and Google Play. Netflix revenue grew 81% Y/Y, while YouTube saw 114% growth.

Note Regarding Revenue Estimates

Our estimates include U.S. daily revenue totals for App Store and Google Play for Jan. 1, 2016 through Dec. 31, 2018. We report gross revenue (including the cut for Apple or Google). Android estimates do not include third-party stores. Figures represent aggregate revenue of all app versions, ex: Facebook and Facebook Lite.

Netflix ▶ Worldwide App Store Revenue



Netflix plans to stop using Apple’s billing system in its app to avoid sharing its revenue with Apple. Apple takes a 30% cut for new subscribers and 15% for renewals.

As Netflix revenue has had sustained growth since 2016, Apple could miss out on a substantial amount of revenue due to new Netflix subscribers signing up on the web.

Note Regarding Revenue Estimates

Our estimates include worldwide daily revenue totals for App Store and Google Play for Jan. 1, 2016 through Dec. 31, 2018. We report gross revenue (including the cut for Apple or Google). Android estimates do not include third-party stores. Figures represent aggregate revenue of all app versions, ex: Facebook and Facebook Lite.



#4: Health & Fitness



Health & Fitness

Subscription revenue contributed an increasing share of overall app revenue in 2018. Health & Fitness apps are representative of this shift, with many meditation and workout apps reaching new revenue highs in 2018.

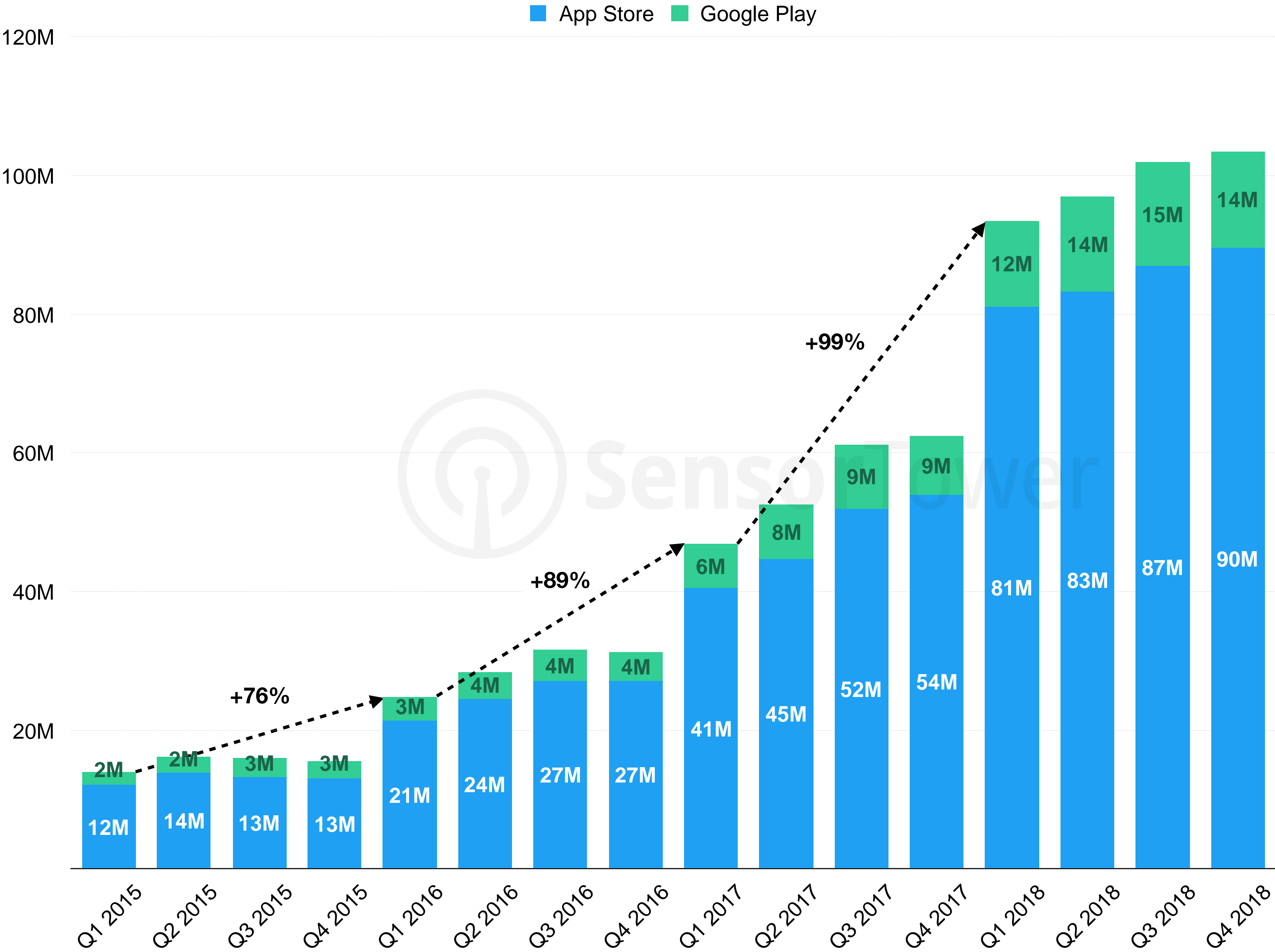
Key Stats:

- Health & Fitness was the No. 7 category in revenue in 2018 in both the U.S. App Store and Google Play Store.
- In 2018, Health & Fitness apps grossed nearly \$400 million in the U.S. The category made only \$62 million in 2015.
- Calm and Headspace, the top earning meditation apps, grossed a combined \$60 million in 2018, more than double their combined total from 2017.

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Health & Fitness ▶ U.S. Revenue Growth



Health & Fitness app revenue has had a compound annual growth rate of 70% since 2015, with revenue up from \$14 million in Q1 2015 to \$93 million in Q1 2018.

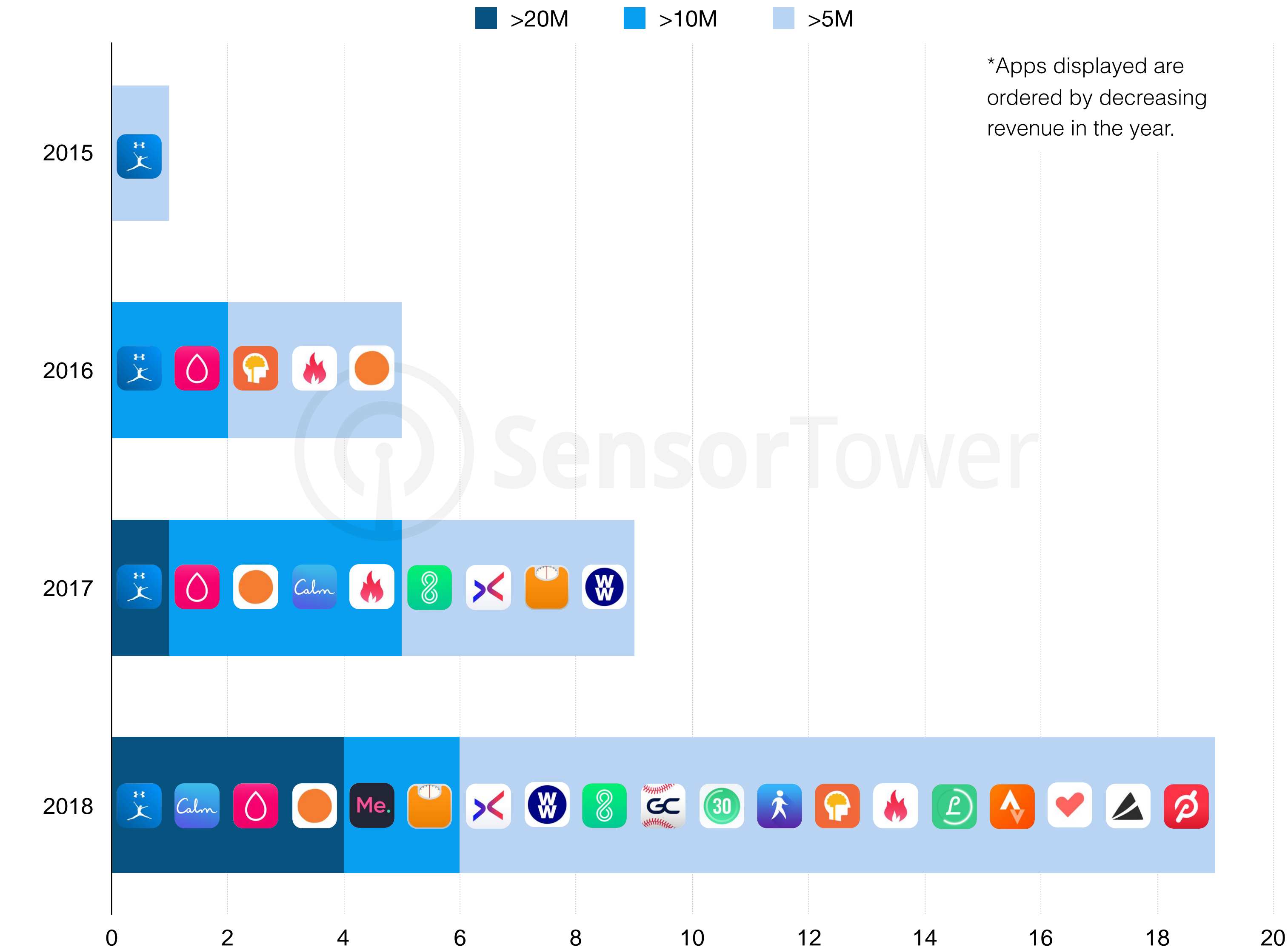
Even as subscription revenue increased across the App Store, Health & Fitness apps accounted for 7.7% of non-game App Store revenue in Q1 2018 (up from 4.2% in Q1 2015).

Note Regarding Revenue Estimates

Our estimates include U.S. daily revenue totals for App Store and Google Play for Jan. 1, 2015 through Dec. 31, 2018. We report gross revenue (including the cut for Apple or Google). Android estimates do not include third-party stores. Figures represent aggregate revenue of all app versions, ex: Facebook and Facebook Lite.

Health & Fitness ▶ Top U.S. Apps

Number of apps exceeding \$5 million yearly U.S. revenue across both platforms



19 Health & Fitness apps surpassed \$5M revenue in 2018, up from only one app in 2015. Fitness app publisher Verv had three apps exceed \$5M, led by Weight Loss Walking.

Three apps earned more than \$20M in a year for the first time in 2018, including meditation apps Calm and Headspace. Workout apps like Sweat and Aaptiv also had strong years.

Note Regarding Revenue Estimates

Our estimates include U.S. daily revenue totals for App Store and Google Play for Jan. 1, 2015 through Dec. 31, 2018. We report gross revenue (including the cut for Apple or Google). Android estimates do not include third-party stores. Figures represent aggregate revenue of all app versions, ex: Facebook and Facebook Lite.



#5: Cash App



Cash App

Square's Cash App surpassed Venmo in all-time U.S. downloads in March, 2018. It was the top installed finance app of the year, ahead of other money transfer apps such as Venmo, PayPal, and Zelle.

Key Stats:

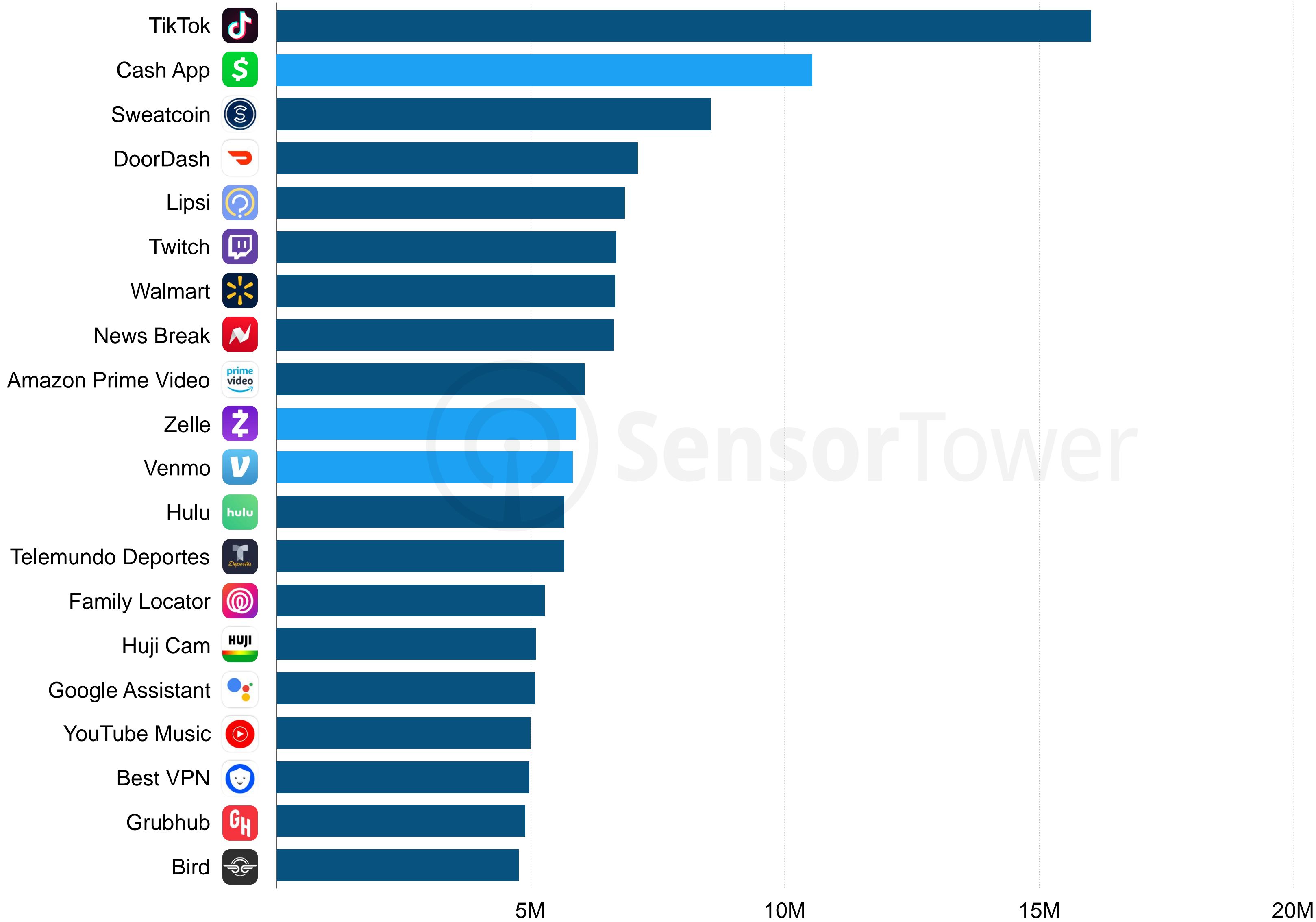
- Was among the top 20 apps in U.S. downloads in 4Q18 for both the App Store and Google Play.
- Had the second highest download growth between 2017 and 2018 of any apps in the U.S., ranking only behind TikTok.
- Surpassed Venmo in all-time downloads in April, 2018.

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Top Apps ▶ U.S. Download Growth

Download growth between 2017 and 2018, App Store and Google Play



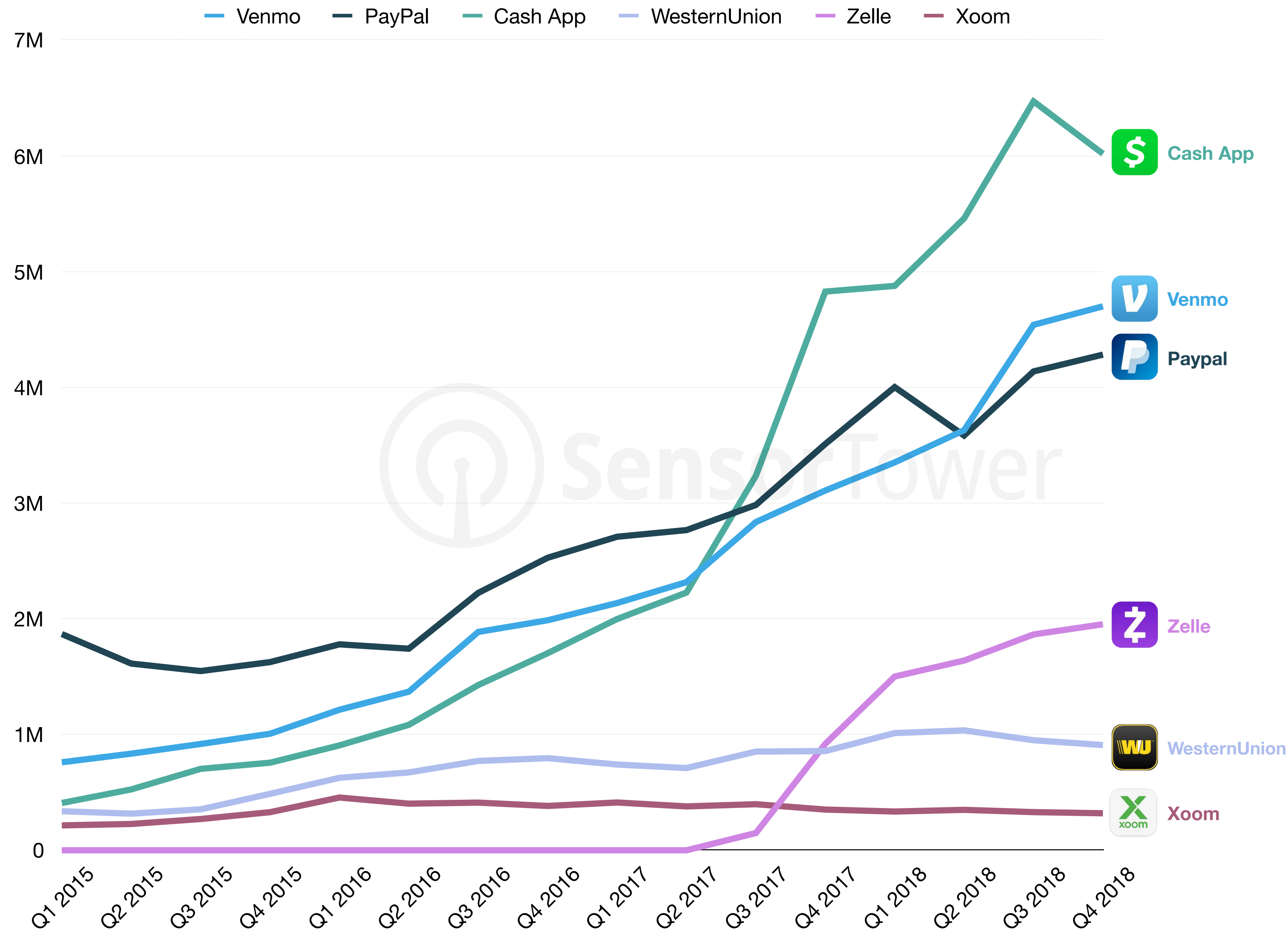
Square’s Cash App had the second largest download growth in the U.S. from 2017 to 2018. Cash App installs increased from 12M in 2017 to nearly 23M in 2018, an 86% growth rate.

Zelle, from Early Warning Services, and PayPal-owned Venmo were also among the top growing apps. The PayPal app was just outside the top 20 with growth of 4 million installs.

Note Regarding Download Estimates

Our estimates include worldwide downloads for iPhone, iPad, and Google Play for Jan. 1, 2017 through Dec. 31, 2018. We report unique installs only. Android estimates do not include third-party stores. Figures represent aggregate installs of all app versions, ex: Facebook and Facebook Lite.

Money Transfer ▶ U.S. Download Growth



Cash App passed its PayPal rivals for the first time in 3Q17 and has been the top installed money transfer app since. It ranked No. 16 among apps in the U.S. in 2018.

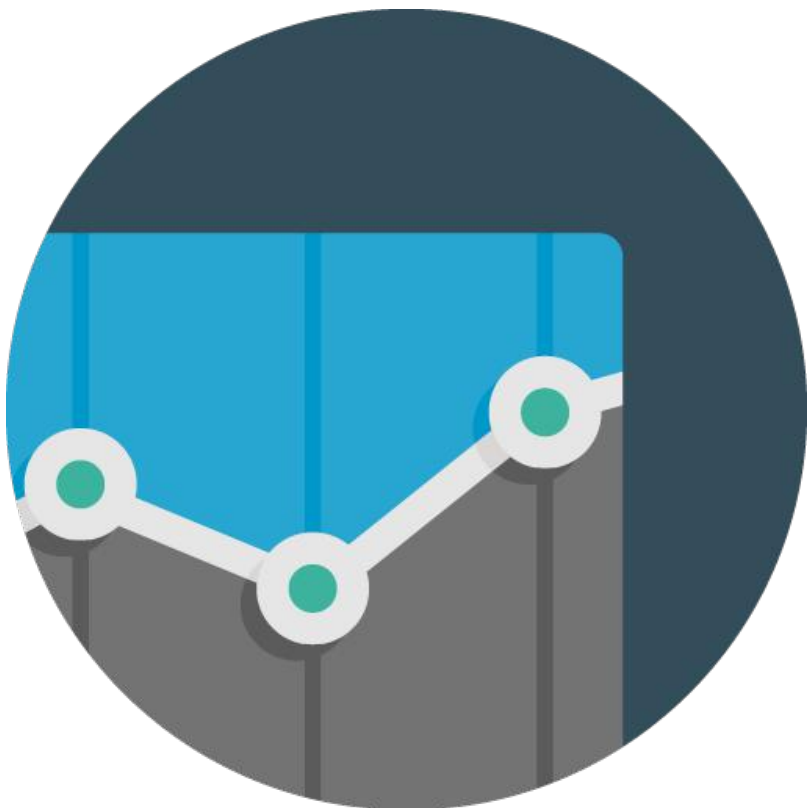
Cash App passed Venmo in all-time U.S. downloads in April, 2018. PayPal remained the most installed money transfer app with more than 50 million all-time U.S. downloads.

Note Regarding Download Estimates

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