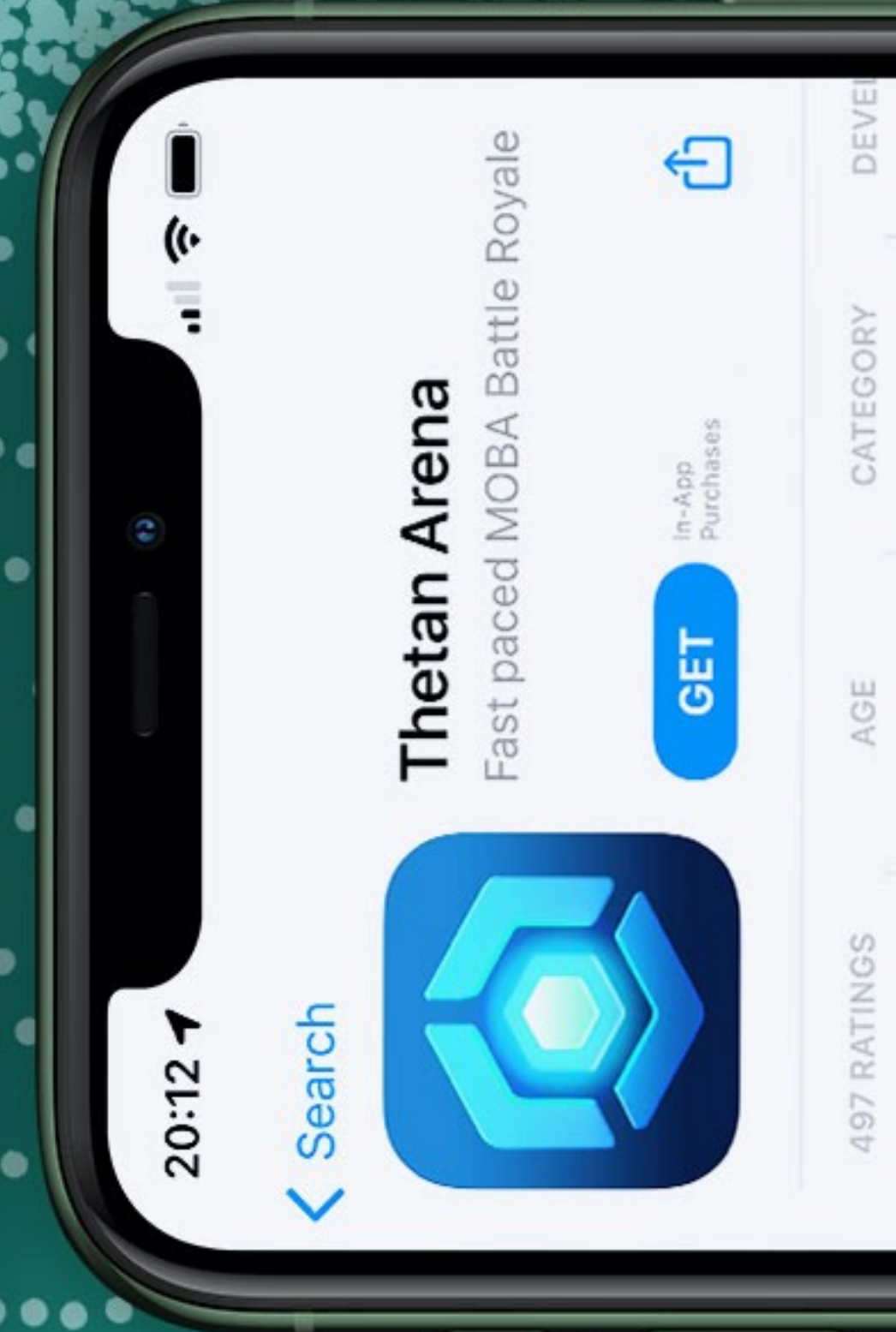
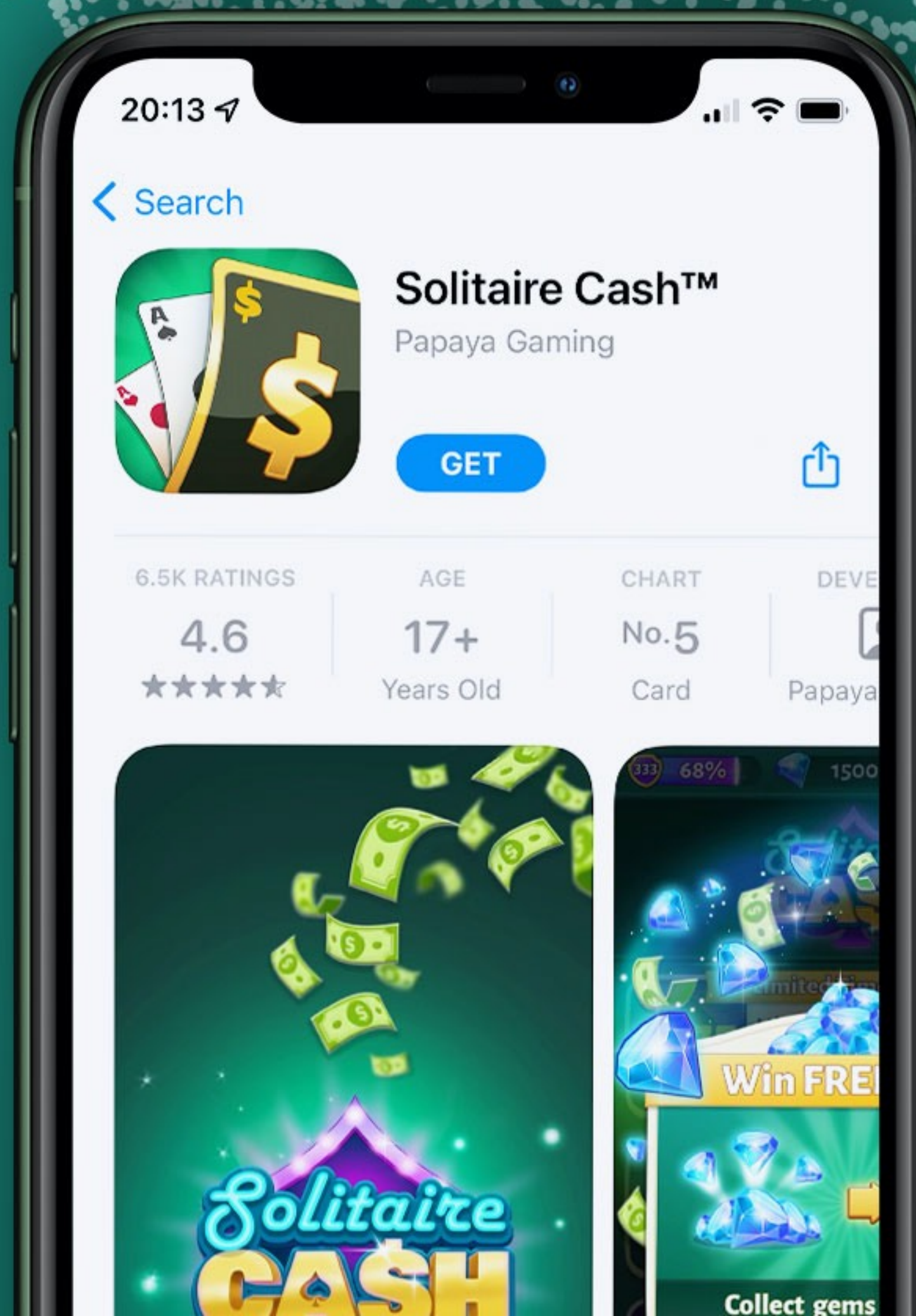
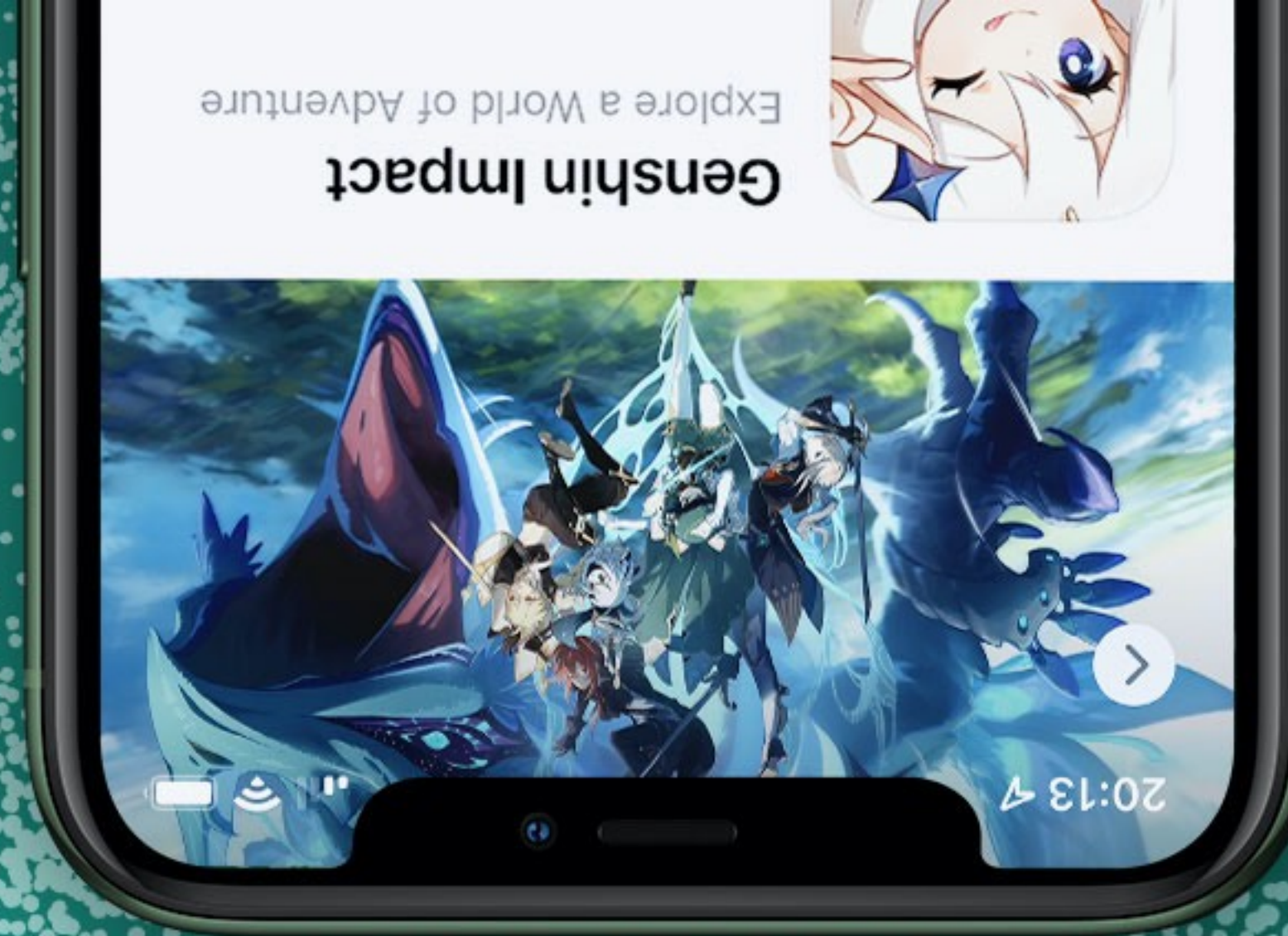


# The State of Mobile Game Monetization 2022

—  
An Analysis of the Latest Mobile  
Game Monetization Strategies



# Table of Contents

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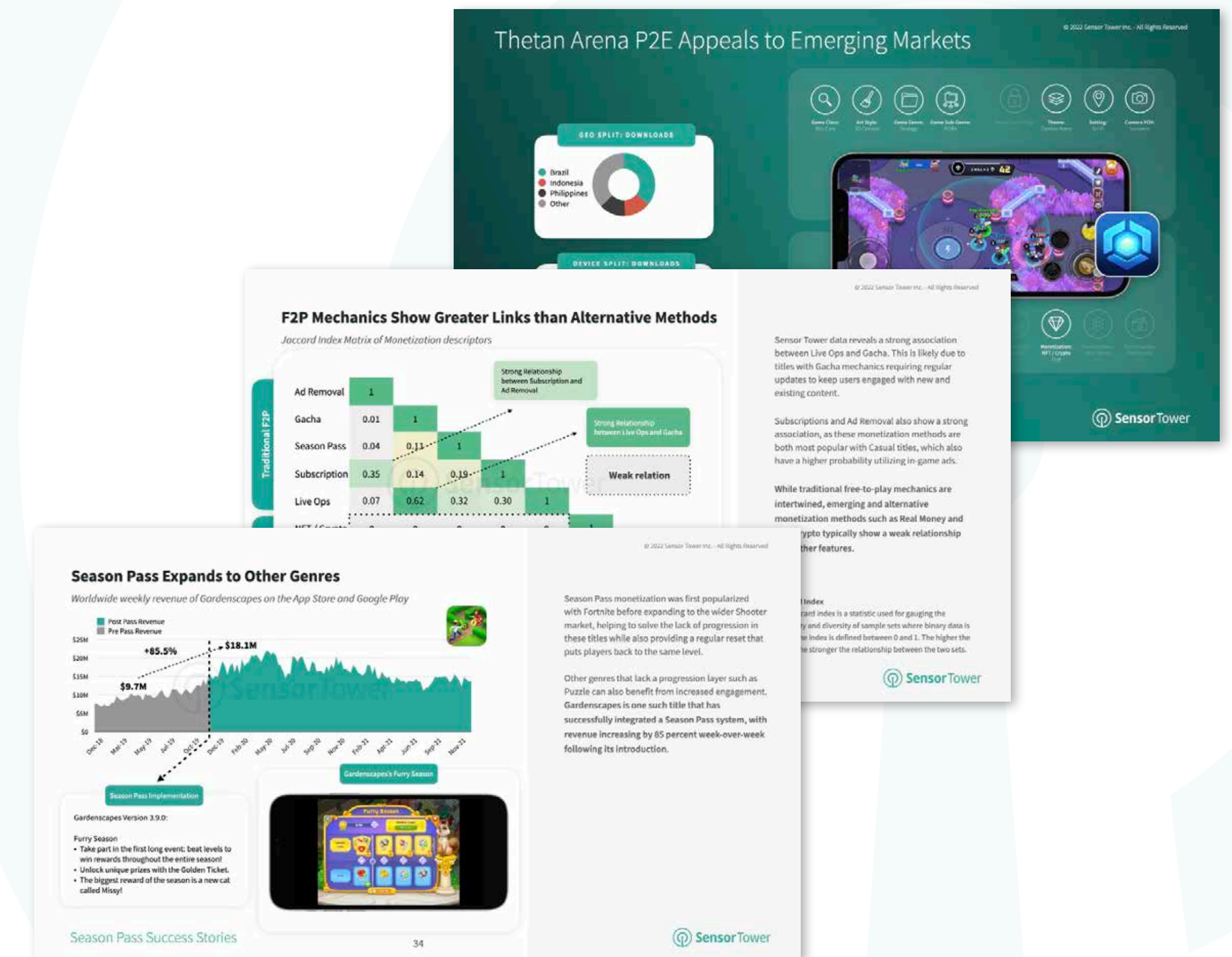
- 03 - Introduction
- 04 - Game Intelligence: Taxonomy Genres
- 05 - Monetization Descriptors Definitions
- 06 - Game Taxonomy Deep Dive
- 09 - Game Monetization Market Overview
- 12 - Top Games by Monetization Descriptors
- 20 - Overview of NFT/Crypto Games
- 24 - Monetization and Game Taxonomy Synergies
- 32 - Season Pass Success Stories
- 36 - Conclusion

# Introduction

This report presents an overview of game monetization methods for mobile games, delving into the key market trends and examining how these strategies fit into the wider game taxonomy.

This analysis leverages **Sensor Tower's Game Taxonomy, Game Intelligence, App Intelligence, Store Intelligence, Ad Intelligence,** and **App Teardown** data.

- Revenue figures represent gross consumer spending (before the fees taken by Apple or Google).
- 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, app 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.



# Game Intelligence: Taxonomy Genres

## CASUAL

### Hypercasual

- Hypercasual - Puzzle
- Hypercasual - Arcade
- Hypercasual - Simulation
- Hypercasual - Traversal
- Hypercasual - Action
- Hypercasual - .io
- Hypercasual - Ultracasual
- Hypercasual - Sports
- Hypercasual - Racing
- Hypercasual - Other

### Lifestyle

- Customization
- Interactive Story
- Music / Band
- Lifestyle Simulator

### Arcade

- Platform / Runner
- Idler
- Traditional Shoot 'em Up
- Arcade Driving
- Social Party
- Other Arcade

### Simulation

- Simulator
- Driving / Flight Simulator
- Tycoon / Crafting
- Adventure
- Time Management
- Sandbox
- Breeding

### Geolocation AR

- Geolocation AR

### Tabletop

- Board
- Drawing & Coloring
- Solitaire / Mahjong
- Card

### Puzzle

- Classic Match 3
- Other Match 3
- Puzzle & Decorate
- Word
- Hidden Objects
- Trivia
- Action Puzzle
- Bubble Shooter
- Tile Blast
- Merge
- Other Puzzle

## MID-CORE

### RPG

- Turn-based RPG
- MMORPG
- Survival
- Puzzle RPG
- Idle RPG
- Squad RPG
- Action RPG

### Strategy

- 4X Strategy
- Build & Battle
- Tower Defense
- Tactical Battler
- Card Battler
- Empire Simulation
- MOBA

### Action

- Action Sandbox
- Beat 'em Up
- Fighting
- Hack and Slash
- Open World Adventure
- Move and Shoot

### Shooter

- FPS / 3PS
- Sniper
- Battle Royale
- Tactical Shooter

## SPORTS & RACING

### Sports

- Arcade Sports
- Realistic Sports
- Sports Manager

### Racing

- Arcade Racing
- Realistic Racing

## CASINO

### Casino

- Poker / Cards
- Slots
- Bingo
- Social Casino
- Other Casino

## Monetization Descriptor Definitions

**Ad Removal** as a monetization feature enables the player to remove ads from the game and can be obtained via in-app purchase (IAP).

**Gacha** is a core progression collection system where players can only be granted collectibles with a random delivery mechanic.

**Season Pass** lets the player acquire premium rewards from a ladder progression system directly linked to LiveOps events.

**Subscription** is an IAP purchase granting subscribers special benefits and access to particular content while subscribed.

**Live Ops** is a monetization and retention structure that includes new content, events, challenges, and IAP bundles on a regular basis.

**NFT / Crypto** games utilize NFT (Non-Fungible Tokens) and/or cryptocurrencies based on blockchain technologies to monetize in-game content.

**Real Money - Skill Based** is a monetization structure that allows players to deposit and withdraw real money from skill-based game activities.

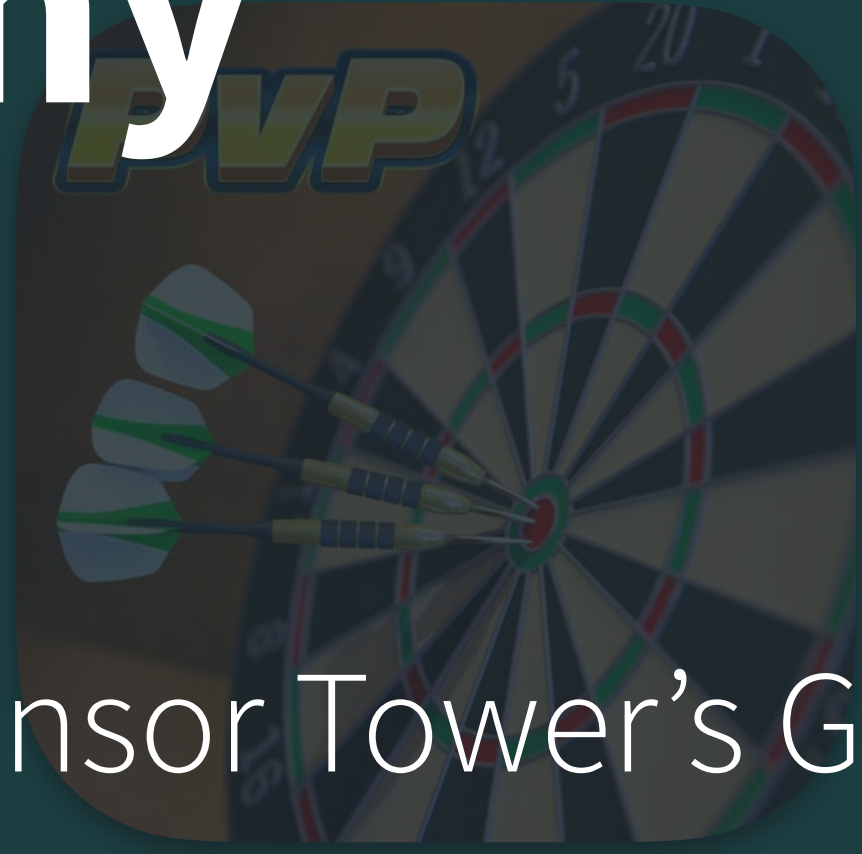
**Paid Games** require users to purchase the game up front to download it.

 Sensor Tower



# Game Taxonomy Deep Dive

Introducing the Full Depth of Sensor Tower's Game Taxonomy



# Overview: Pokémon Unite

## INTELLECTUAL PROPERTY

Licensed IP: Pokémon

IP Operator: The Pokémon Company

Corporate Parent: Nintendo

IP Type: Videogame

## DEVICE SPLIT: DOWNLOADS



● Google Play ● App Store



Game Class:  
Mid-Core

Art Style:  
3D Cartoon

Game Genre:  
Strategy

Game Sub-Genre:  
MOBA

Game Cross-Play:  
Yes

Theme:  
Pokémon  
Battle Creatures

Setting:  
Cartoon Fantasy

Camera POV:  
Isometric



Monetization:  
Ad Removal  
False



Monetization:  
Gacha  
False



Monetization:  
Season Pass  
True



Monetization:  
Subscription  
False



Monetization:  
Live Ops  
True



Monetization:  
NFT / Crypto  
False



Monetization:  
Real Money  
False



Monetization:  
Paid Game  
False

# Overview: Scrabble Go

## INTELLECTUAL PROPERTY

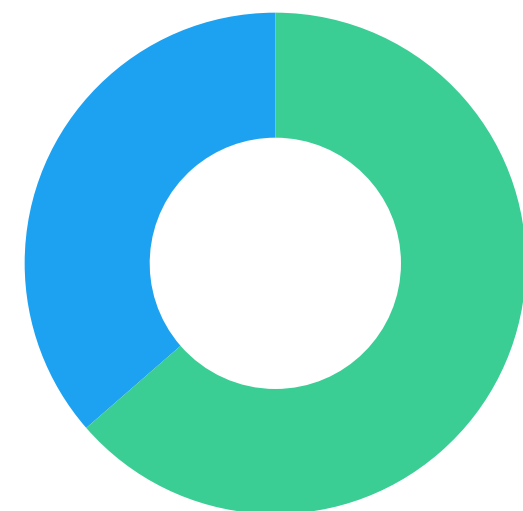
Licensed IP: Scrabble

IP Operator: Hasbro

Corporate Parents: Hasbro

IP Type: Board Game

## DEVICE SPLIT: DOWNLOADS



● Google Play ● App Store



Game Class:  
Casual



Game Cross-Play:  
N/A



Art Style:  
2D Realistic



Theme:  
Tabletop



Game Genre:  
Puzzle



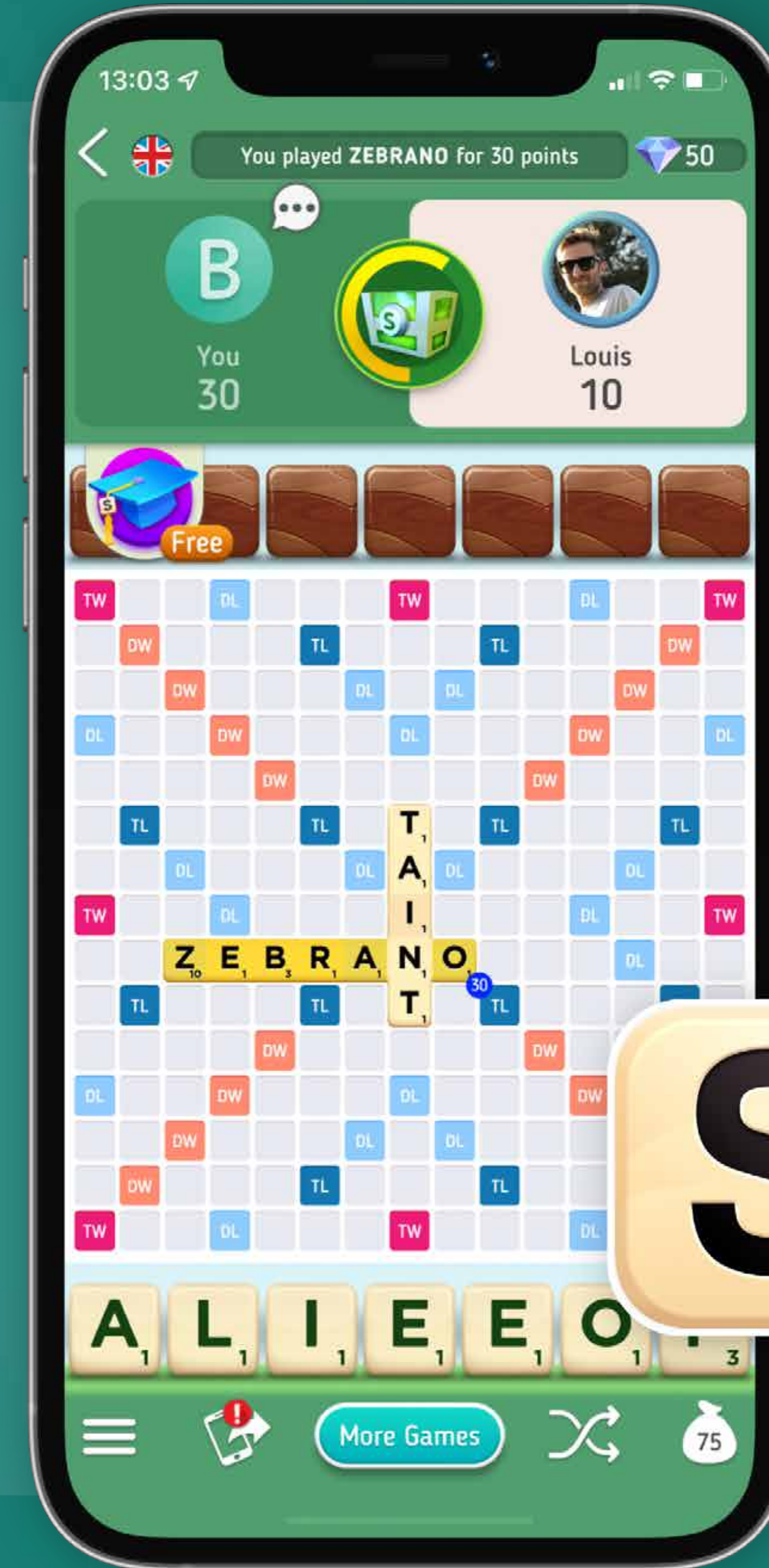
Setting:  
N/A



Game Sub-Genre:  
Word



Camera POV:  
Top Down



Monetization:  
Ad Removal  
True



Monetization:  
Live Ops  
True



Monetization:  
Gacha  
False



Monetization:  
NFT / Crypto  
False



Monetization:  
Season Pass  
True



Monetization:  
Real Money  
False



Monetization:  
Subscription  
True



Monetization:  
Paid Game  
False



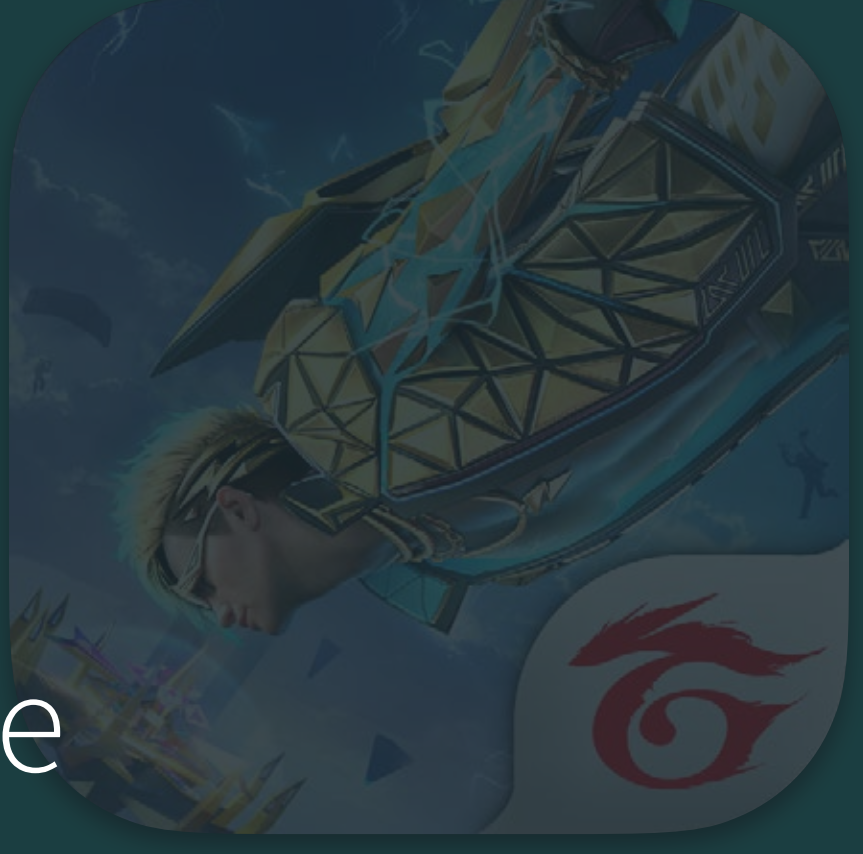


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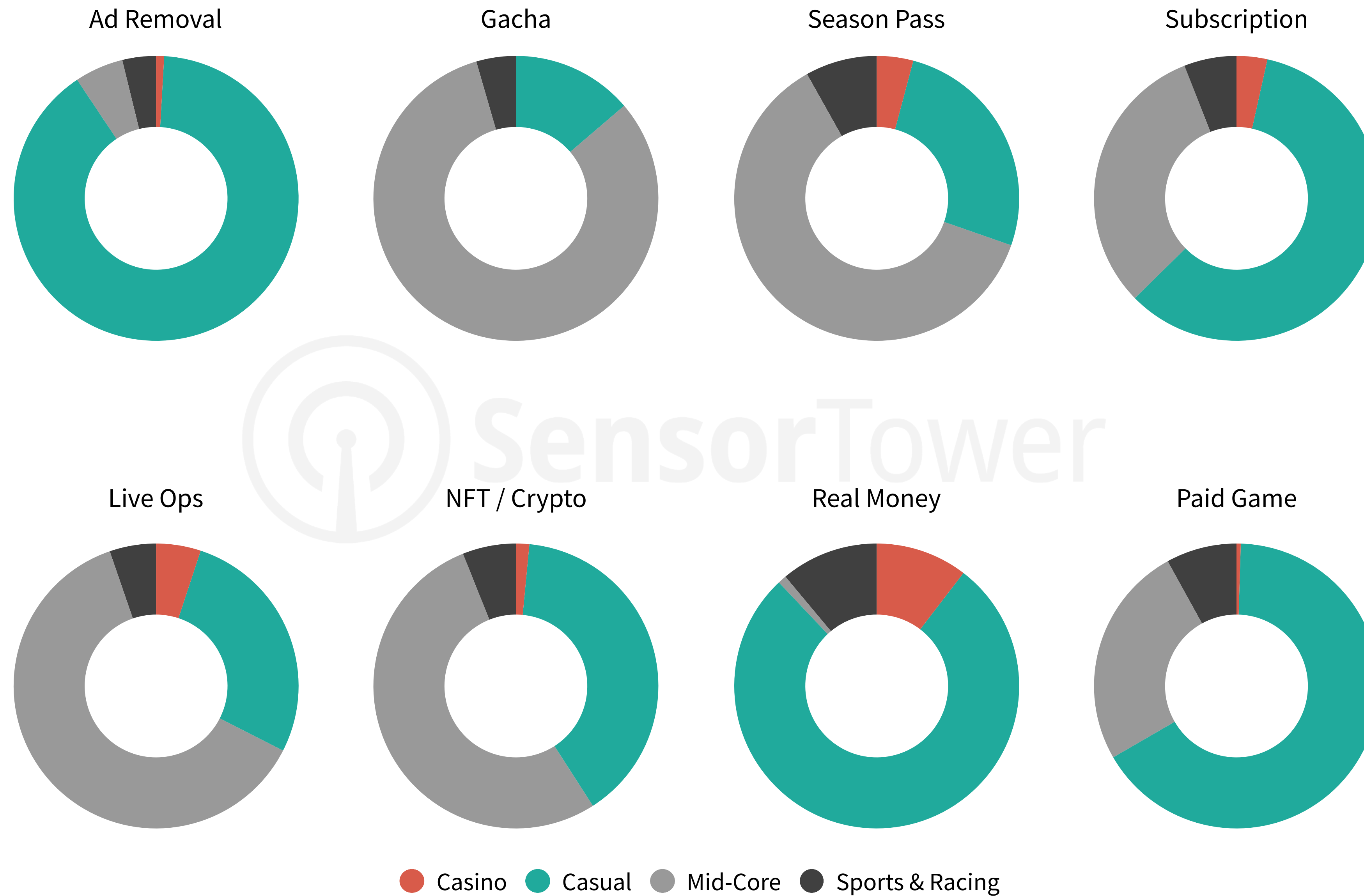
# Game Monetization Market Overview

—  
Monetization Mechanics by Game Class and Genre



# NFT Games Experiment with Different Audiences

Percentage of games by Class utilizing monetization method



Ad Removal is the most popular monetization mechanic, driven by numerous casual titles that rely more heavily on ads than any other class. Casual games account for 90 percent of the games using this monetization option.

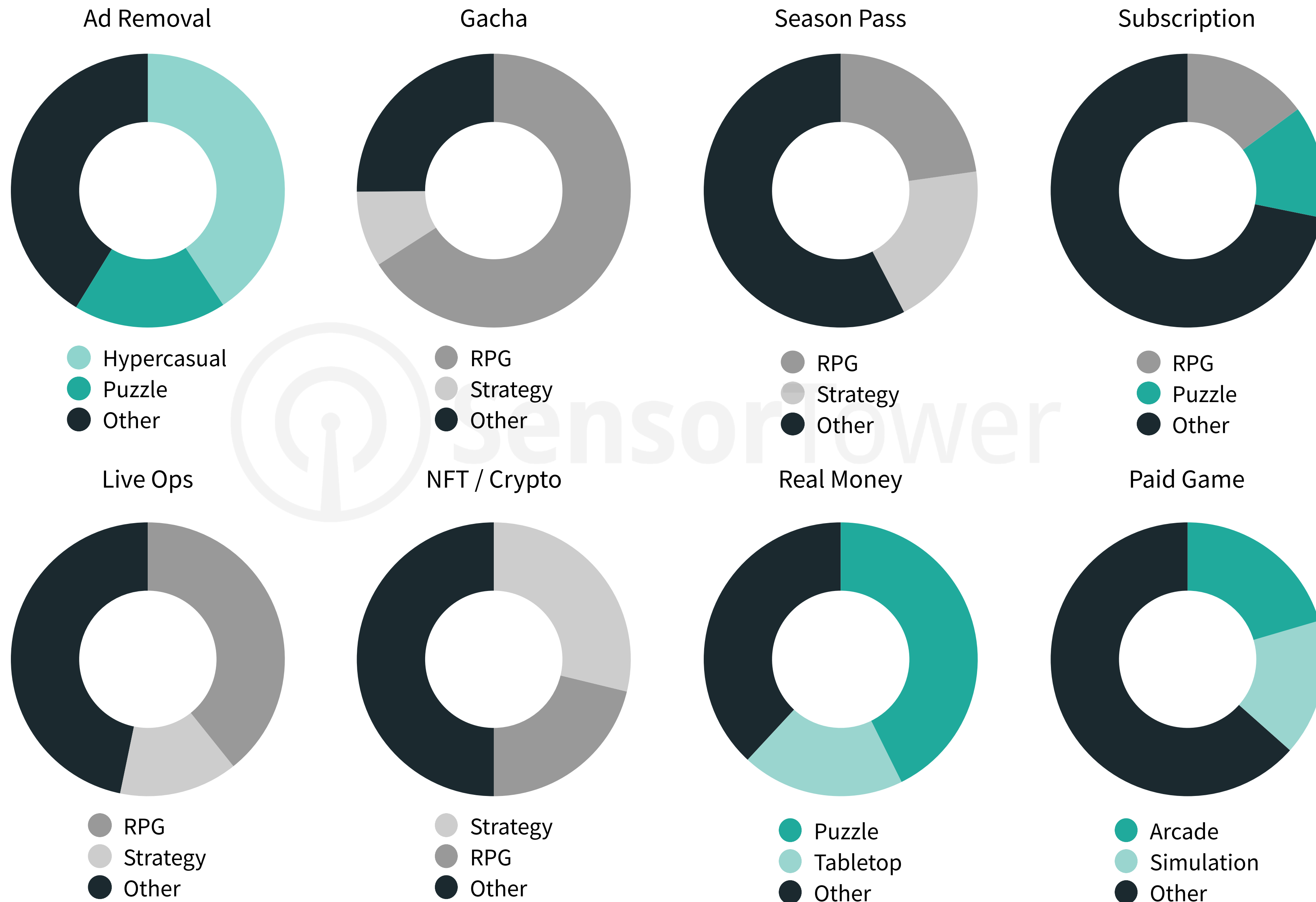
Gacha is a core progression collection system where players can only be granted collectables with a random delivery mechanic. This is more widely seen in the top Asian mid-core titles, with mid-core accounting for 82 percent of games using the feature.

The nascent NFT / Crypto space is currently showing a diverse range of classes from mid-core to casual, reflecting early experimentation to find the most monetizable audience.

Casino only represents 10 percent of Real Money titles, while skill-based Casual games such as Pool Payday, which use the third-party platform Skillz, make up 77 percent.

# RPG Complexity Fuels Monetization Diversity

Percentage of games by Genre utilizing monetization method



Hypercasual, which is heavily driven by ad monetization, is the most common genre among games that have implemented an Ad Removal option, accounting for 40 percent of these titles.

RPG and Strategy account for a combined 42 percent of titles that have implemented a Season Pass. The feature was initially popularized by the Shooter market, and seven out of the top 10 revenue generating Shooter titles worldwide now utilize this feature.

While most of the monetization features are skewed to the top two genres, Subscriptions are common across a variety of different genres. The top two genres represent less than 30 percent of the number of titles that use Subscriptions as a monetization feature.

Due to their complexity, RPGs use the most diverse range of monetization mechanics, standing out for five of our eight descriptors, including Gacha, Season Pass, and Live Ops.

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# Top Games by Monetization Descriptors

How Top Titles Utilize Monetization Features



# Casual Leverages Ad Removal Monetization for Success

Top 10 games by worldwide revenue in 2021 with Ad Removal



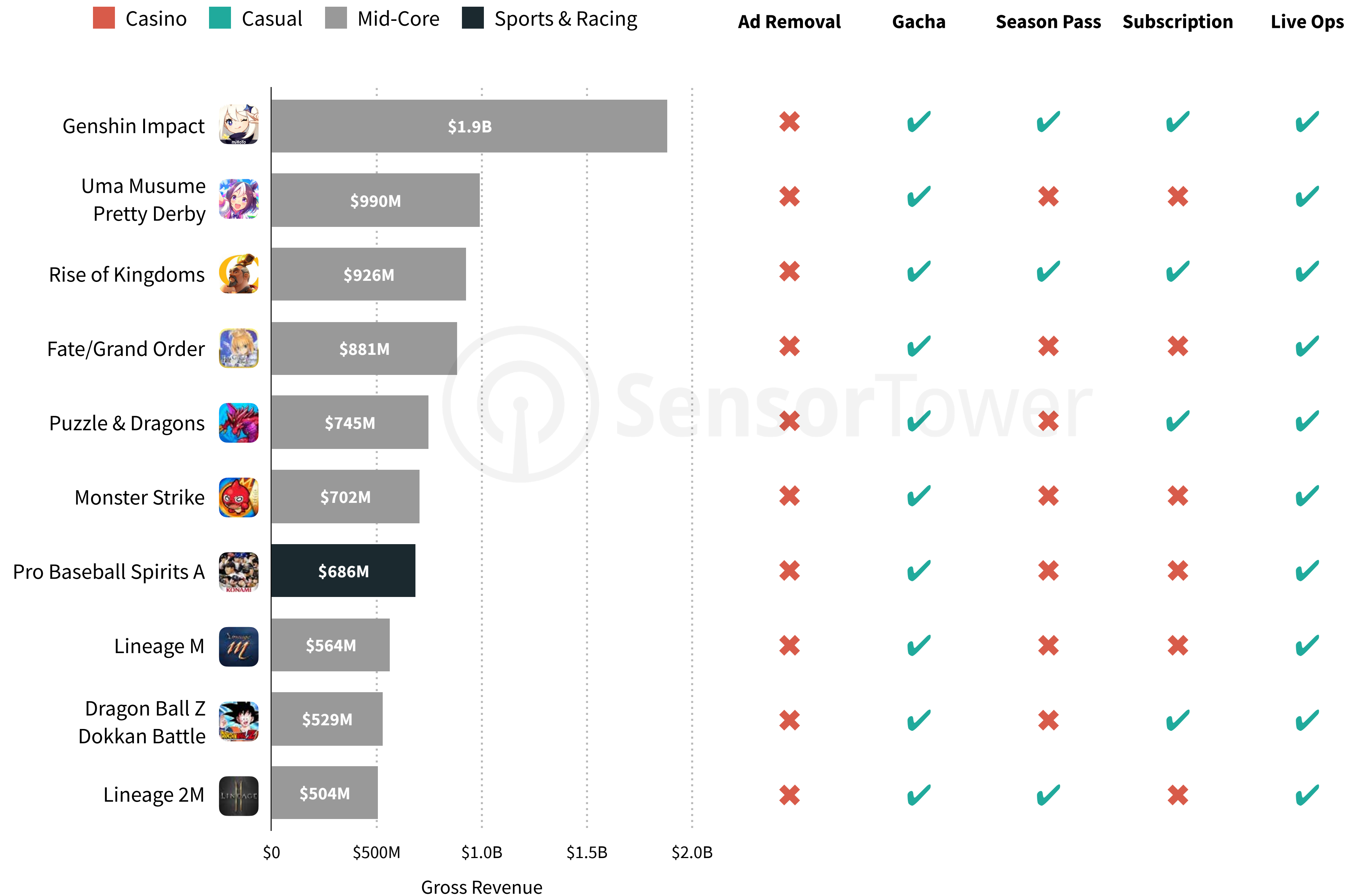
Casino game Cash Tornado Slots from AppLovin stands out as the only non-casual title in the top 10 grossing that features an Ad Removal option.

Three of the top earning titles with an Ad Removal option (Cash Tornado Slots, Wordscapes, and Match 3D) are published by AppLovin.

This demonstrates the publisher's expertise in the mobile advertising space, where it operates its own ad network. It is able to leverage this, in some cases alongside other monetization methods.

# Konami Finds Lucrative Blend Between Sports and Gacha

Top 10 games by worldwide revenue in 2021 with Gacha



Gacha is most commonly utilized in the Mid-Core market, with titles in the class accounting for nine of the top 10 revenue generating mobile games that feature Gacha monetization.

Only three out of the top 10 grossing Gacha games also implemented a season pass, suggesting that there are challenges in implementing the two models together.

Konami has successfully implemented Gacha mechanics into its sports titles such as Professional Baseball Spirits A and eFootball PES 2021. While these two titles are skewed toward the Japanese market, another game, Golf Clash from Playdemic, has successfully brought this to the West.

# Half of the Top 10 Gacha Games in the U.S. are IP-based

Top 10 games by revenue in 2021 in the U.S. with Gacha



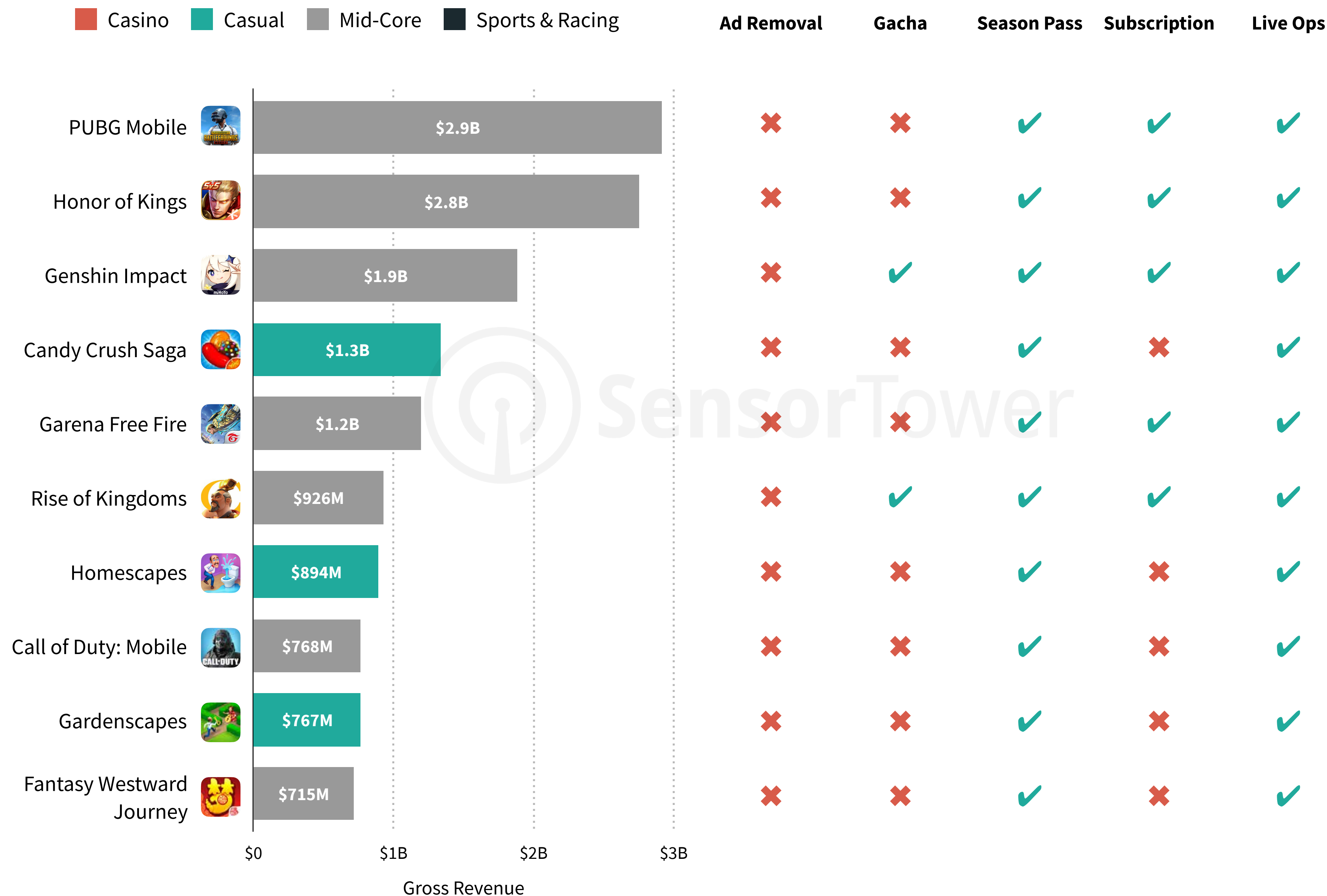
While Gacha continues to be popular and highly lucrative in Asia markets, the monetization model is also proving successful in Western markets like the U.S. through titles such as Genshin Impact and RAID: Shadow Legends.

Half of the top revenue generating titles in the U.S. that feature Gacha utilize an existing IP, such as Star Trek Fleet Command, Marvel Strike Force, and Star Wars: Galaxy of Heroes.

This suggests that famous IPs with a deep roster of existing, notable characters can provide a strong foundation for success with Gacha monetization.

# Half of World's Top Grossing Titles Utilize a Season Pass

Top 10 games by worldwide revenue in 2021 with Season Pass



Half of the top grossing titles worldwide during 2021 featured a Season Pass among their monetization mechanics.

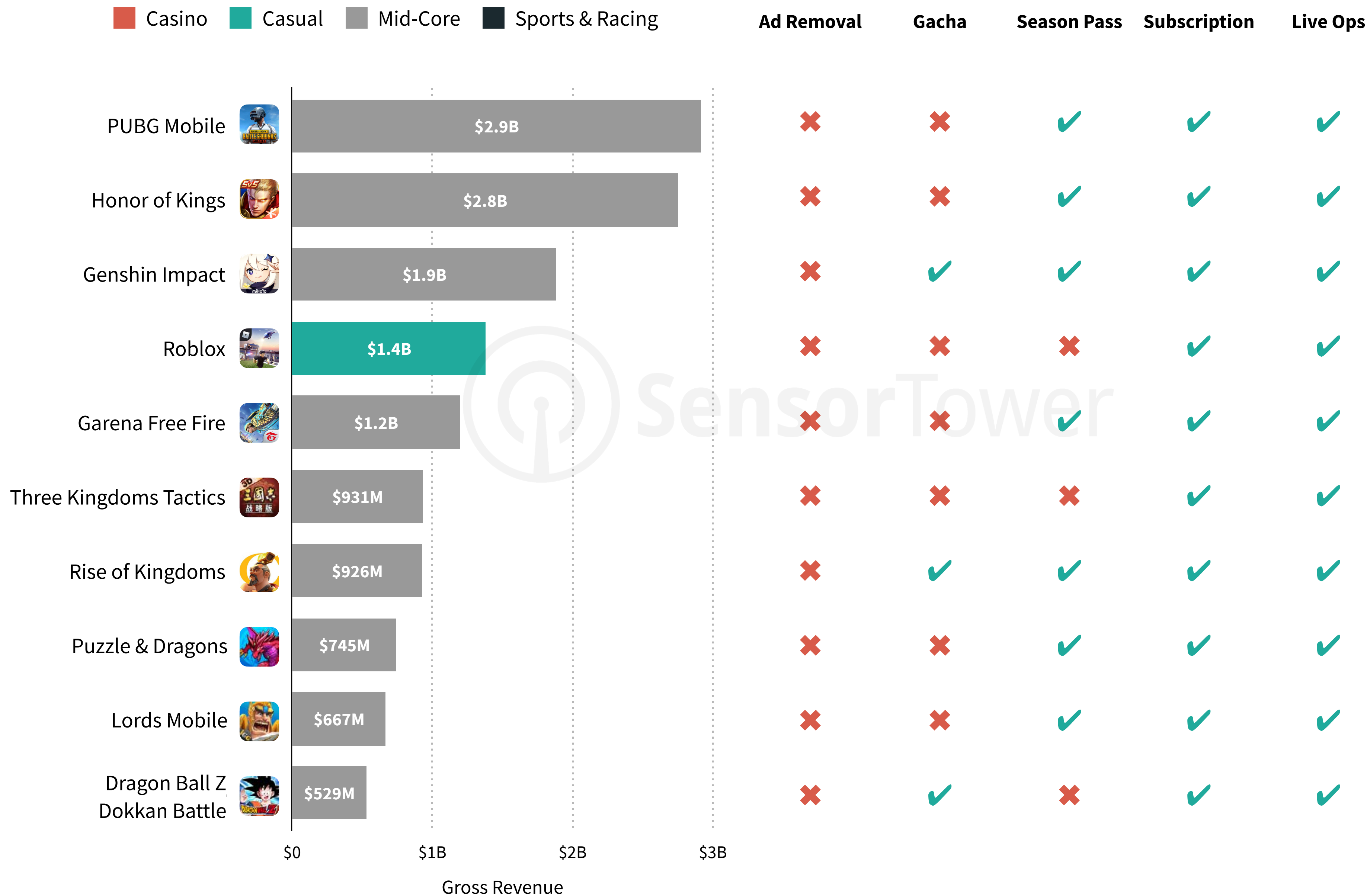
The Shooter genre accounted for three out of the top 10 earning titles that feature a Season Pass. The monetization model has its roots in the category, having been popularized by Fortnite before finding its way into titles such as PUBG Mobile, Garena Free Fire, and Call of Duty: Mobile.

While the majority of the top titles that have implemented a Season Pass are Mid-Core games, Casual titles have also started to add the feature, including Candy Crush Saga from King and Homescapes and Gardenscapes from Playrix.

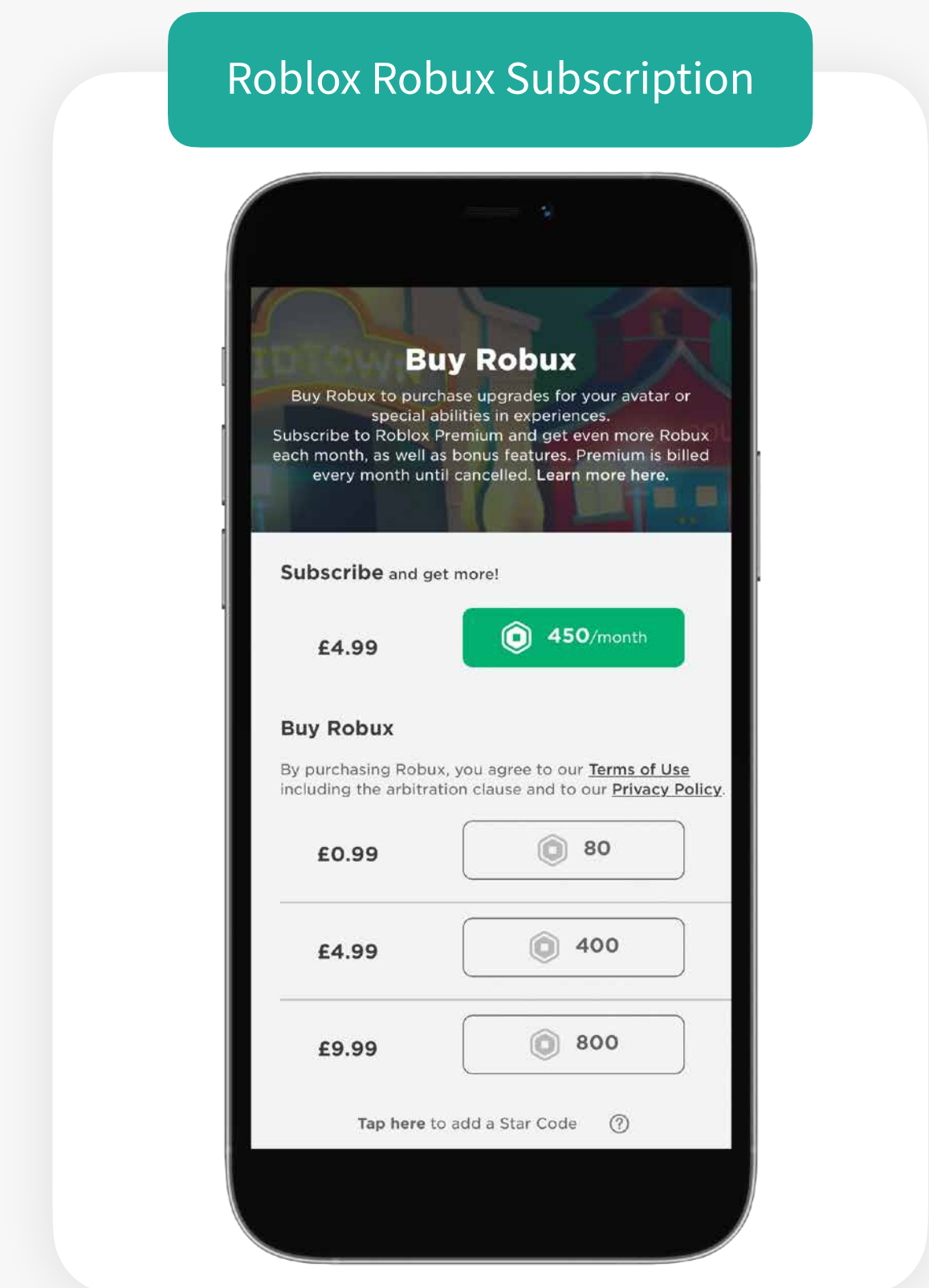


# UGC Fuels Roblox Subscription Success

Top 10 games by worldwide revenue in 2021 with Subscription



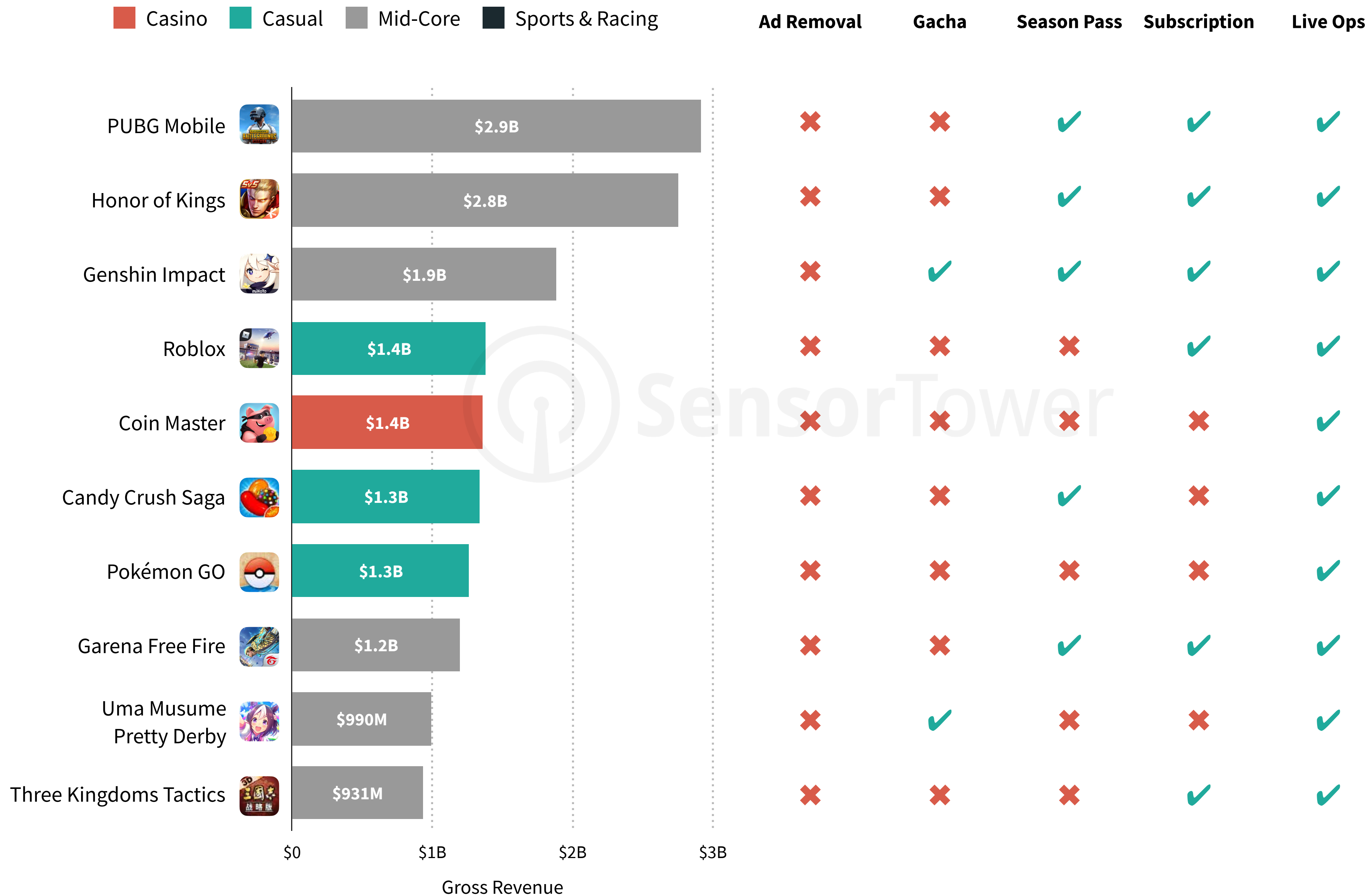
Roblox stands out as one of the only top grossing mobile titles that implements a Subscription without a Season Pass. One of the key foundations for a Subscription model to work is the constant stream of new content to avoid churn, often provided by Live Ops. In the case of Roblox, the subscription provides a regular, set amount of in-game currency, Robux, that can be used on the title's wide variety of user-generated content.



**Note:** While some Roblox experiences have Season Pass implemented, Roblox itself does not.

# Live Ops Is the Standard for Mobile Game Monetization

Top 10 games by worldwide revenue in 2021 with Live Ops



Live Ops has become the base standard for long-term success on mobile, with all of the world's top 10 revenue generating mobile games in 2021 supporting their titles through this method, also called Games as a Service (GaaS).

Every game genre in mobile can utilize Live Ops to drive long-term engagement, retention, and monetization.

Based on Sensor Tower's monetization descriptors, only two of the top 10 Live Ops titles (Coin Master from Moon Active and Pokémon GO from Niantic) rely on this mechanic to fuel their revenue. Other titles typically combine a variety of models on top of their Live Ops service.

# Real Money Emerges as a New Monetization Alternative

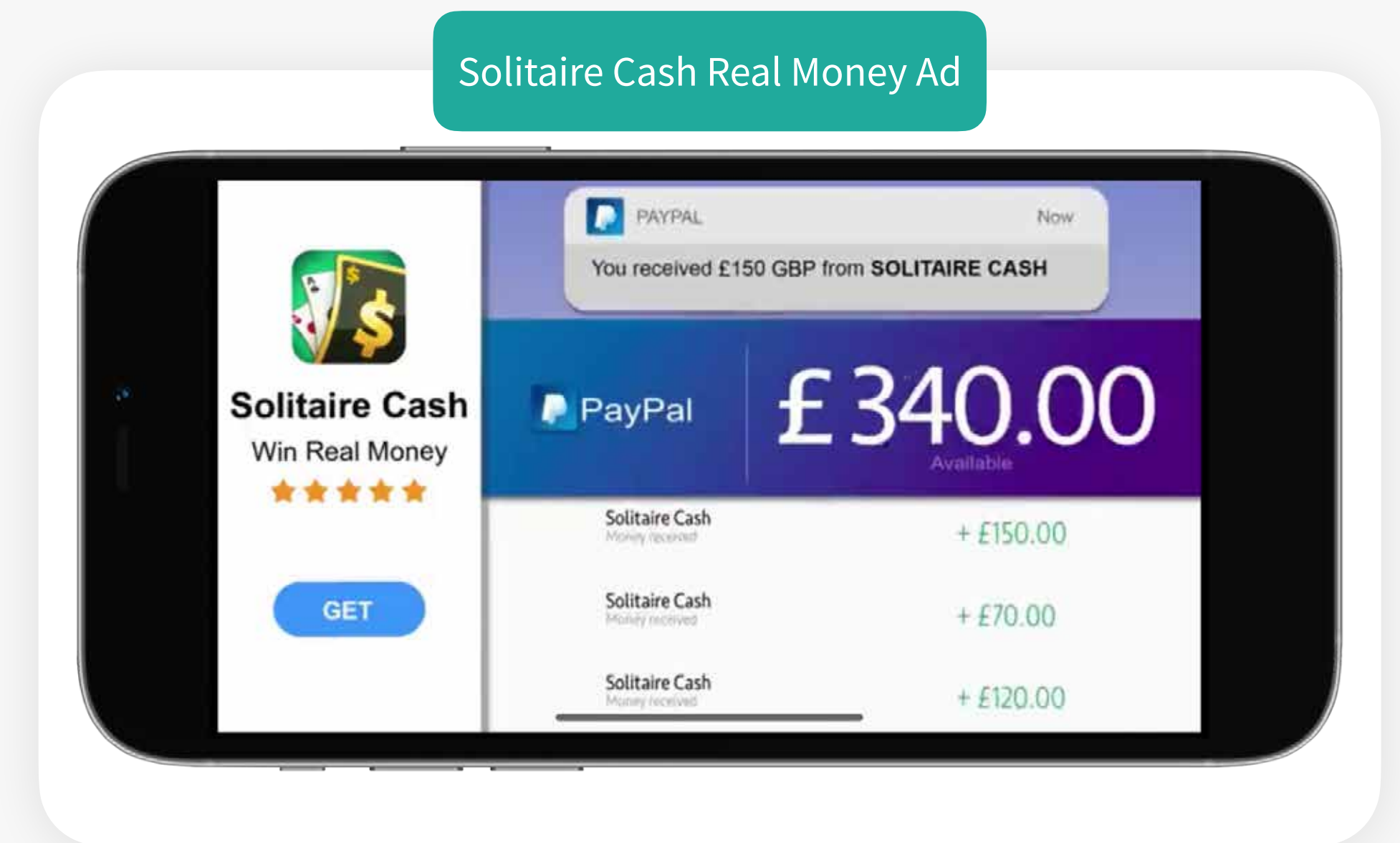
Top 10 games by worldwide downloads in 2021 with Real Money



Real Money is a monetization structure that allows players to deposit and withdraw real money from skill-based game activities. Publishers are able to generate revenue by collecting a percentage of each of these transactions.

Sensor Tower’s App Teardown tracks the Skillz SDK, one of the most prominent payment systems for skill-based games, which is featured in four of the top 10 Real Money games globally by downloads.

Many real money games highlight the potential to receive actual money through terms such as “Win Cash” in their app names.



 Sensor Tower



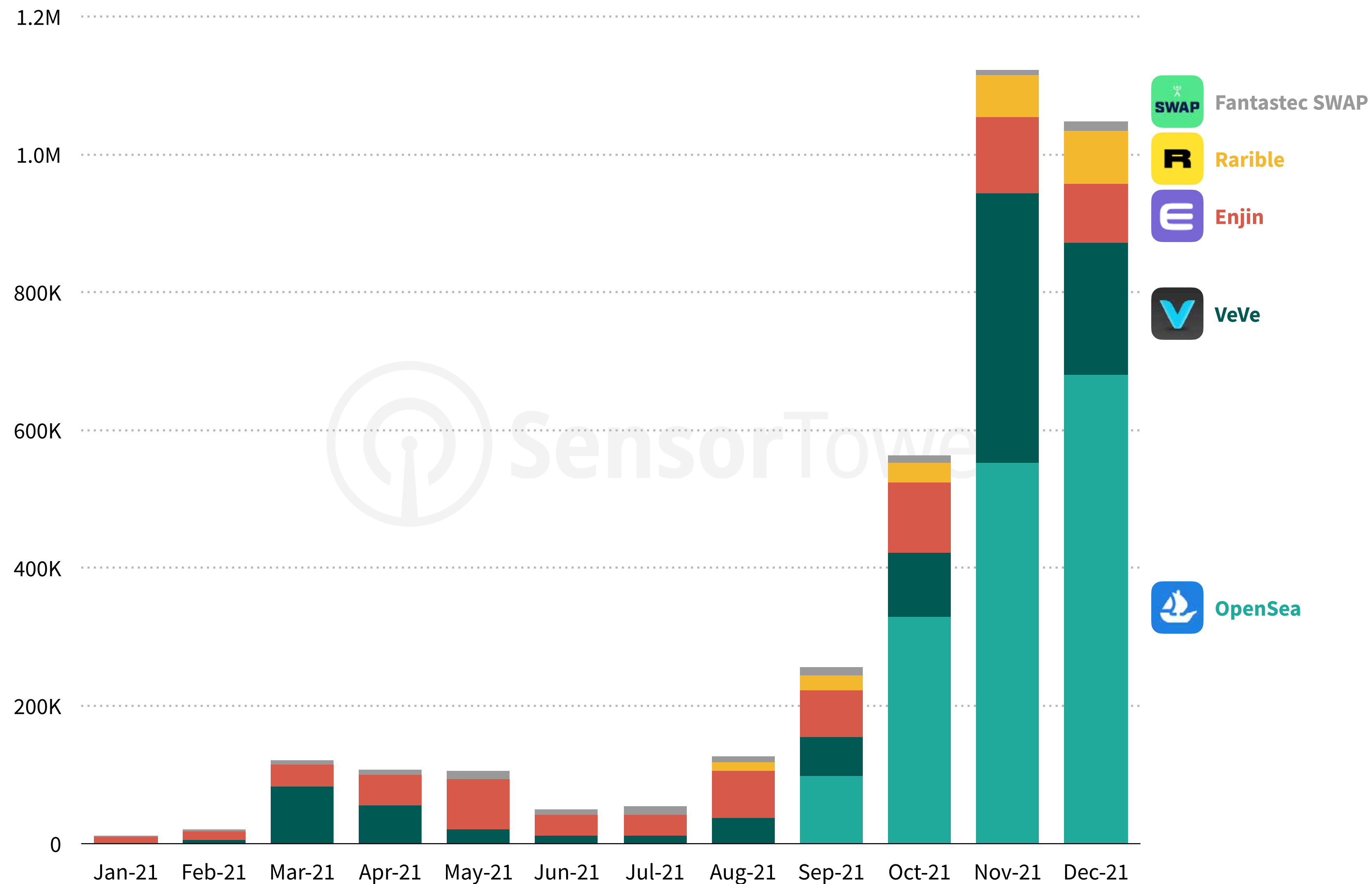
# Overview of NFT/Crypto Games

Tracing Blockchain's Journey to Mobile



# NFTs Have Begun Their Transition to Mobile

Worldwide downloads for top NFT apps



As NFTs rose to prominence in 2021, some mobile apps focusing on NFTs started to emerge towards the end of the year. These include NFT discovery apps like OpenSea and Rarible, trading apps like VeVe, and wallets like Enjin.

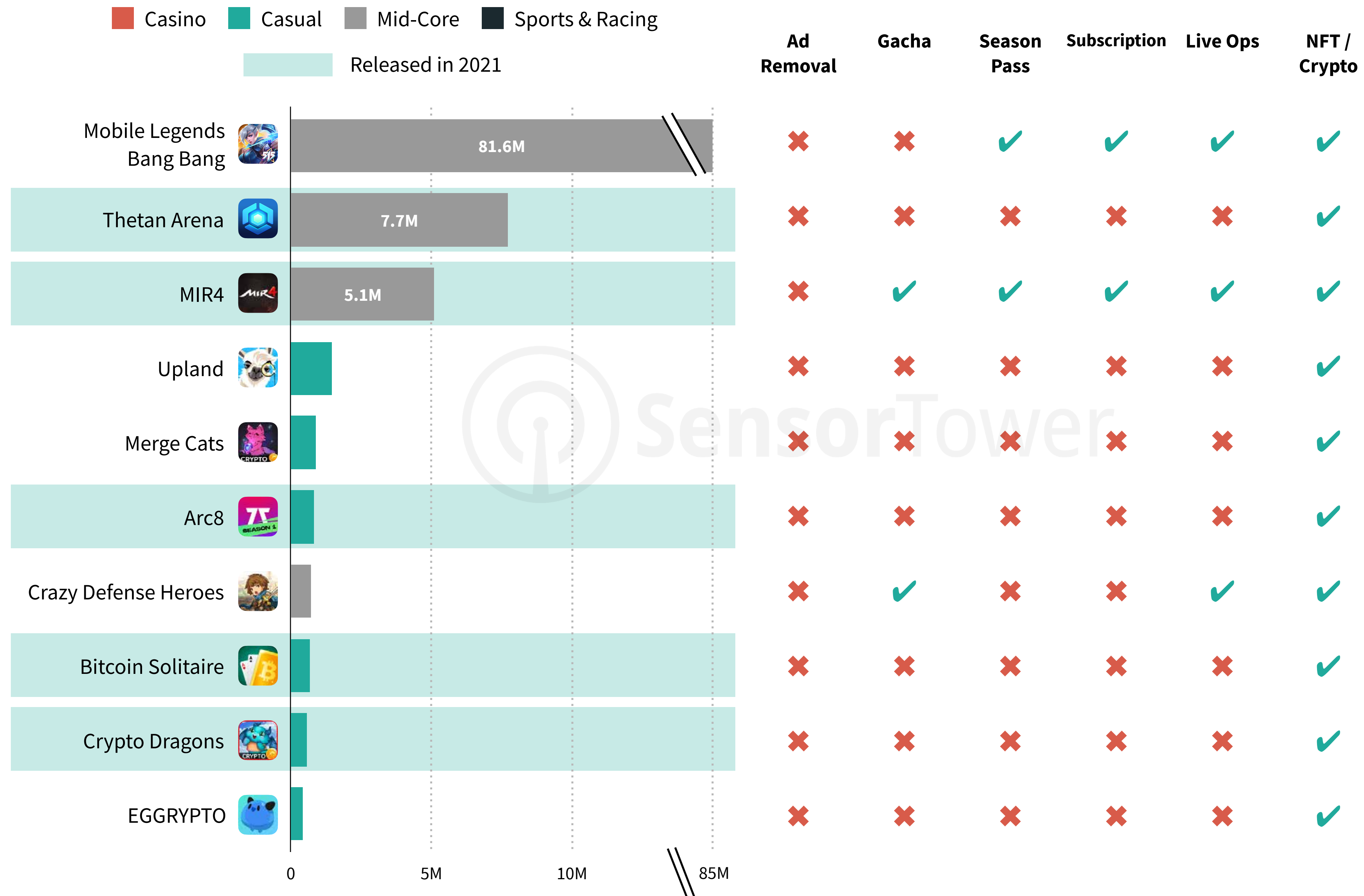
OpenSea has been the top NFT marketplace since it launched in September 2021. While downloads for these apps were still relatively low compared to the overall cryptocurrency space, expect the market to continue to gain popularity in 2022.

### Note Regarding Download Estimates

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

# Mobile Games Start to Incorporate NFT / Crypto Mechanics

Top 10 games by worldwide downloads in 2021 with NFT / Crypto



Mobile Legends: Bang Bang from ByteDance has become one of the world's first major top grossing mobile titles to explore NFT implementation.

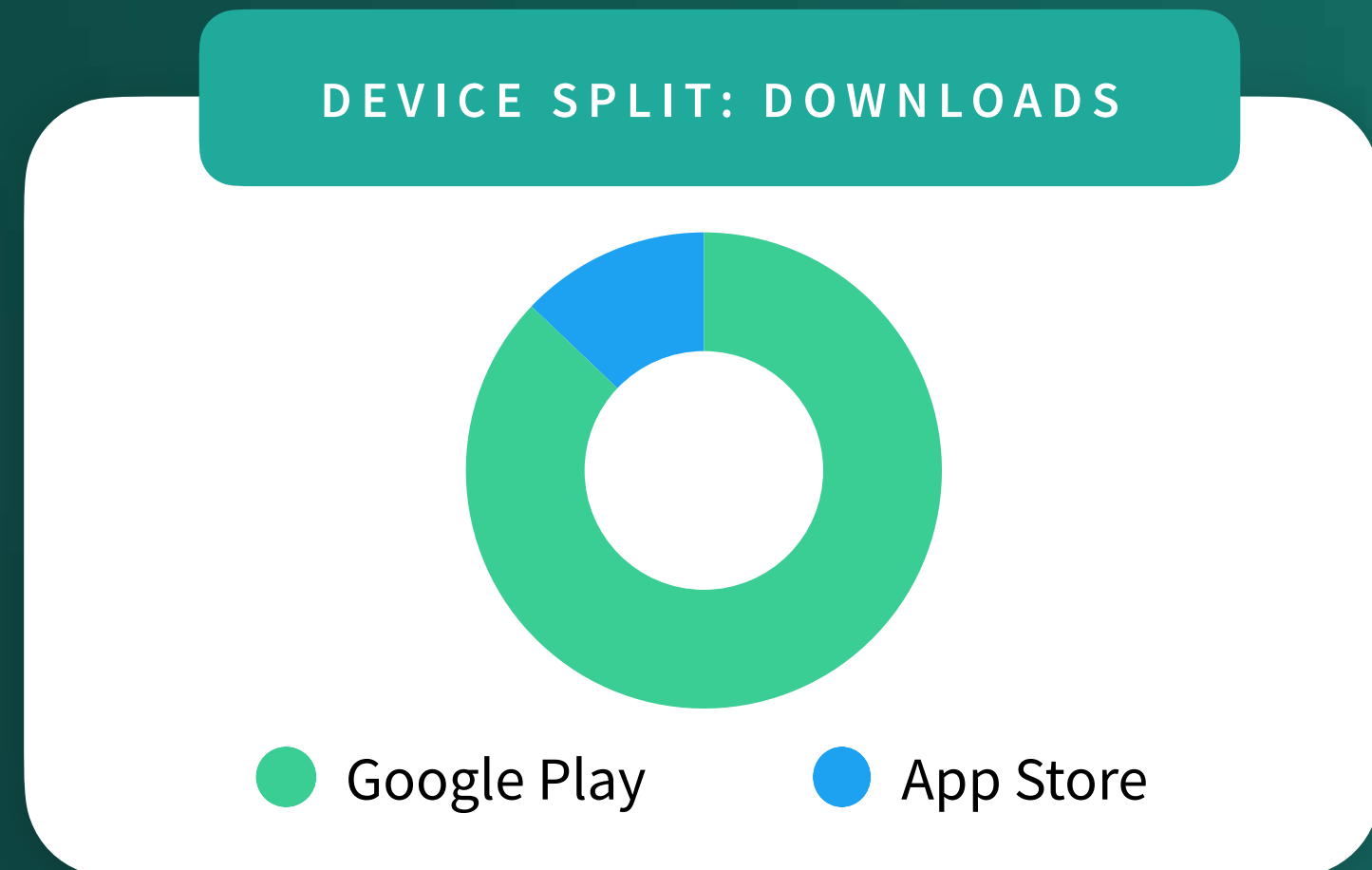
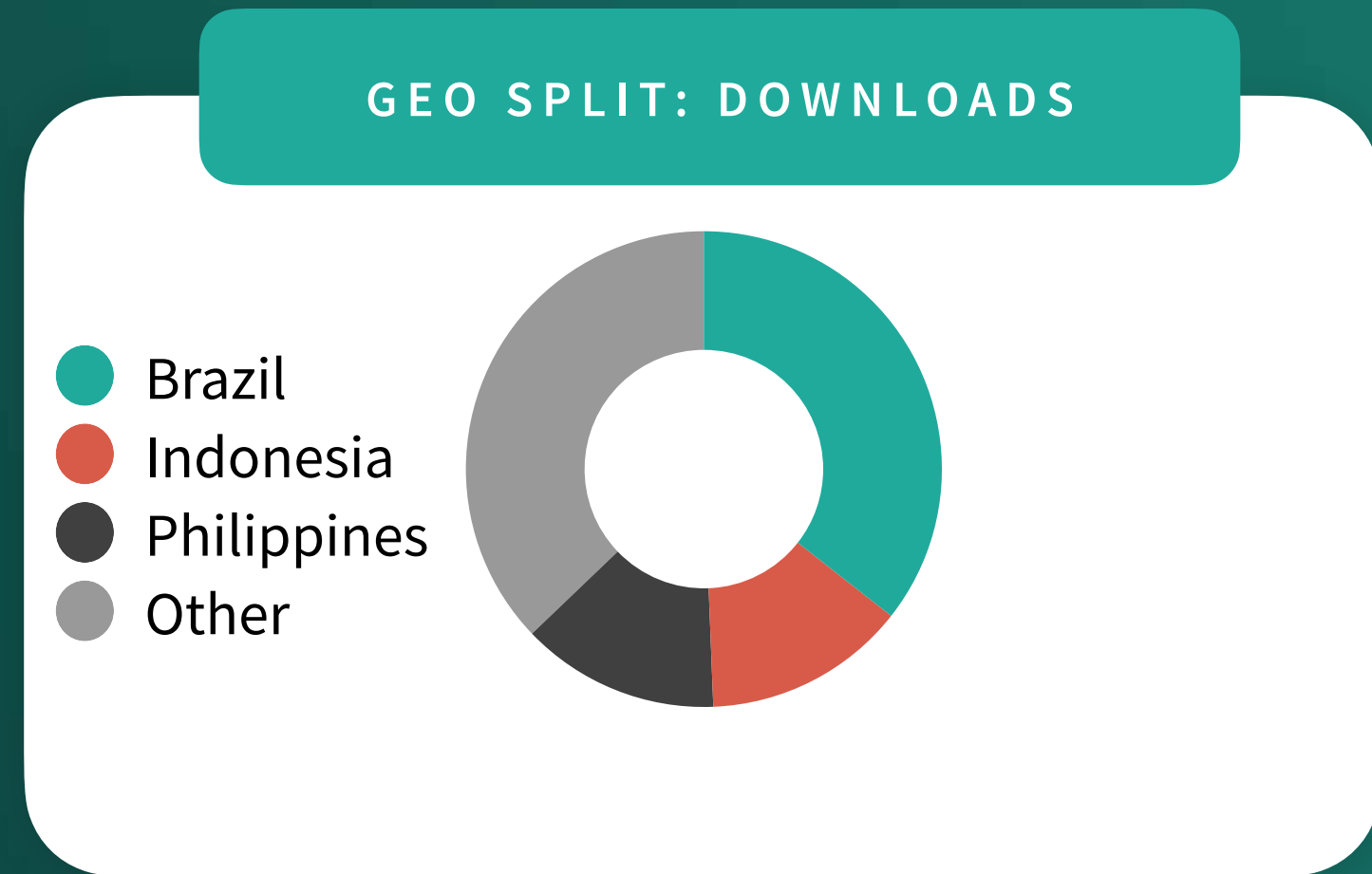
Five of the top 10 most downloaded Crypto games were released in 2021, showing that this is very much a nascent market. Other titles, such as Crazy Defense Heroes, have experimented with NFTs retroactively.

Only five of the most downloaded Crypto games in 2021 surpassed 1 million downloads, again showing this is a new area open to experimentation, and one that faces challenges in the market.

Few of the NFT- and Crypto-based titles have experimented with multiple monetization methods, with MIR4 and Crazy Defense Heroes standing out as featuring a wider variety of options.

Thetan Arena, launched in 2021, is leading the wave of P2E (Play-to-Earn) on mobile, having generated more than 8 million downloads to date.

# Thetan Arena P2E Appeals to Emerging Markets



<b>Game Class:</b> Mid-Core	<b>Art Style:</b> 3D Cartoon	<b>Game Genre:</b> Strategy	<b>Game Sub-Genre:</b> MOBA	<b>Game Cross-Play:</b> No	<b>Theme:</b> Combat Arena	<b>Setting:</b> Sci-Fi	<b>Camera POV:</b> Isometric

A smartphone displaying a MOBA game in progress. The screen shows a top-down view of a battle arena with various characters, health bars, and a score of 1 KILL = 1. A large blue hexagonal logo is overlaid on the right side of the phone.

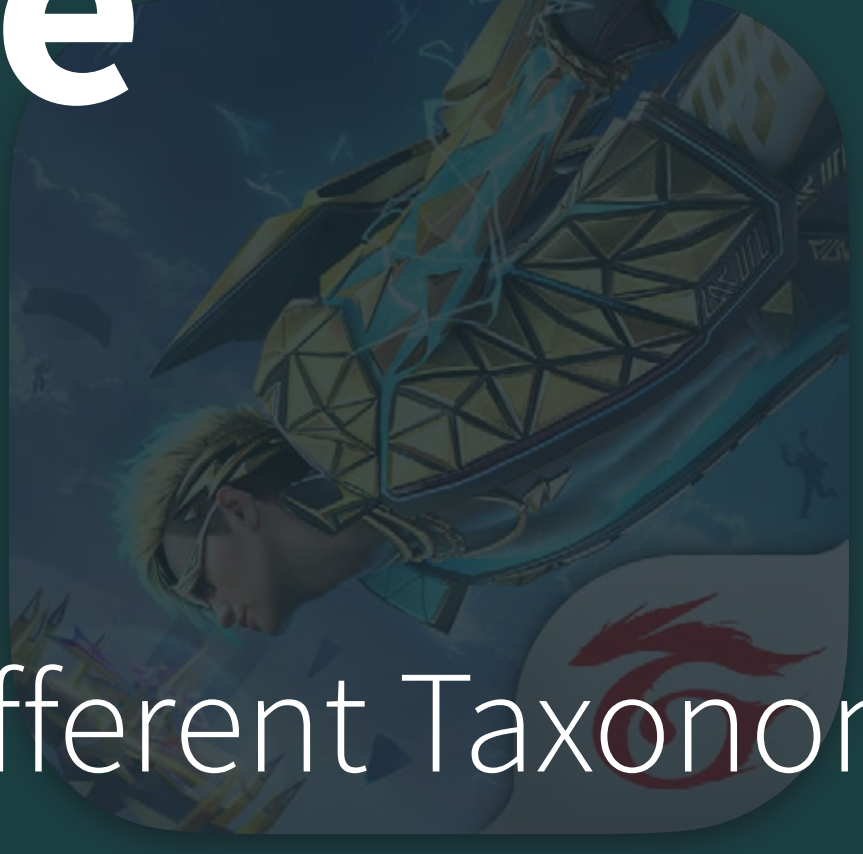
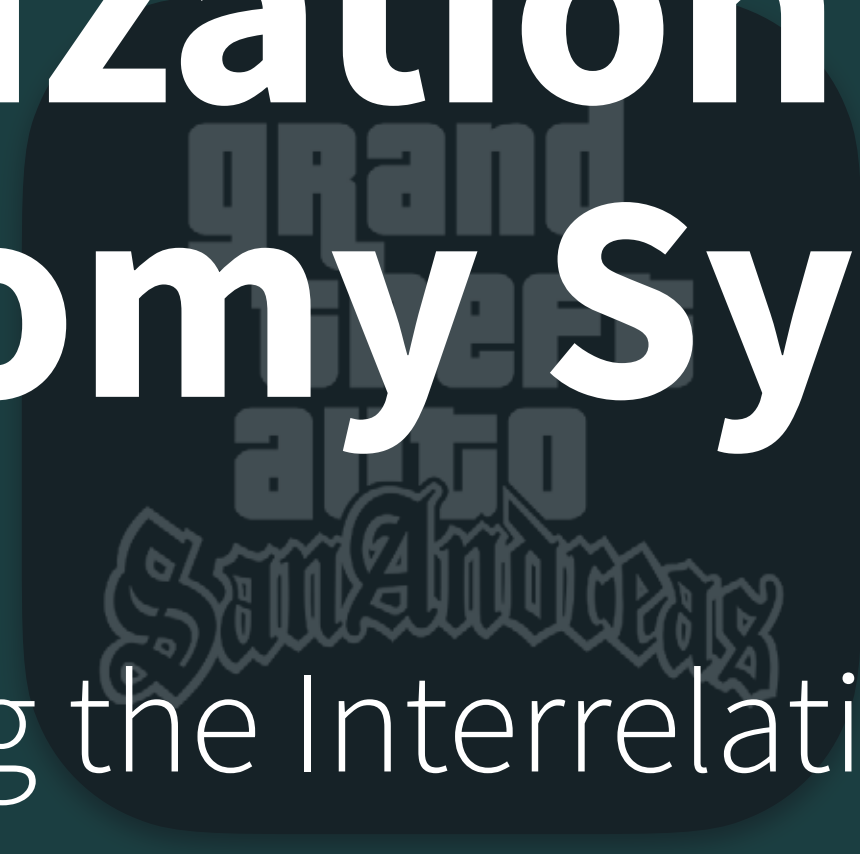
<b>Monetization:</b> Ad Removal False	<b>Monetization:</b> Gacha False	<b>Monetization:</b> Season Pass False	<b>Monetization:</b> Subscription False	<b>Monetization:</b> Live Ops False	<b>Monetization:</b> NFT / Crypto True	<b>Monetization:</b> Real Money False	<b>Monetization:</b> Paid Game False

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# Monetization and Game Taxonomy Synergies

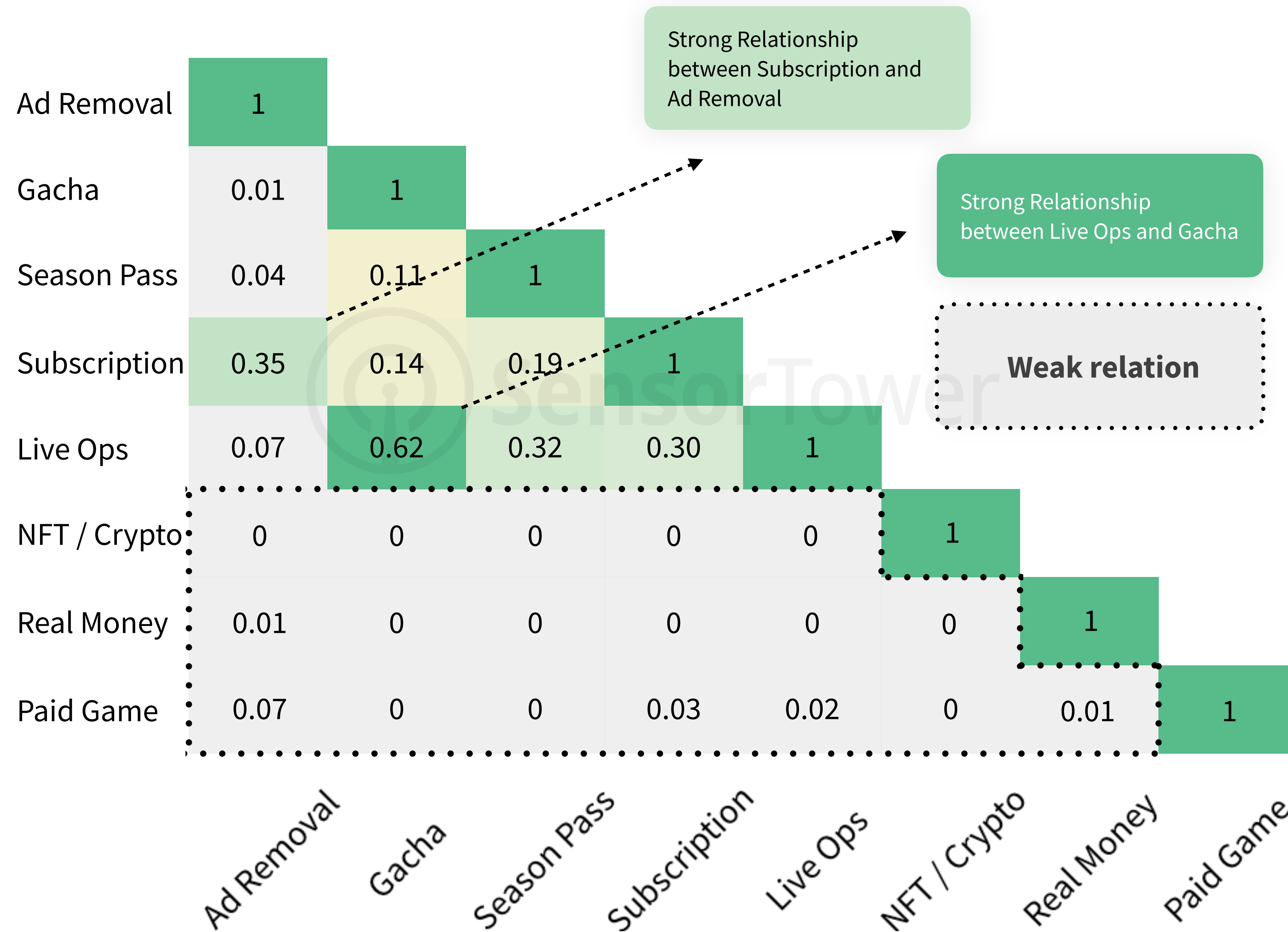
Understanding the Interrelationships Between Different Taxonomy Dimensions





# F2P Mechanics Show Greater Links than Alternative Methods

Jaccard Index Matrix of Monetization descriptors



Sensor Tower data reveals a strong association between Live Ops and Gacha. This is likely due to titles with Gacha mechanics requiring regular updates to keep users engaged with new and existing content.

Subscriptions and Ad Removal also show a strong association, as these monetization methods are both most popular with Casual titles, which also have a higher probability utilizing in-game ads.

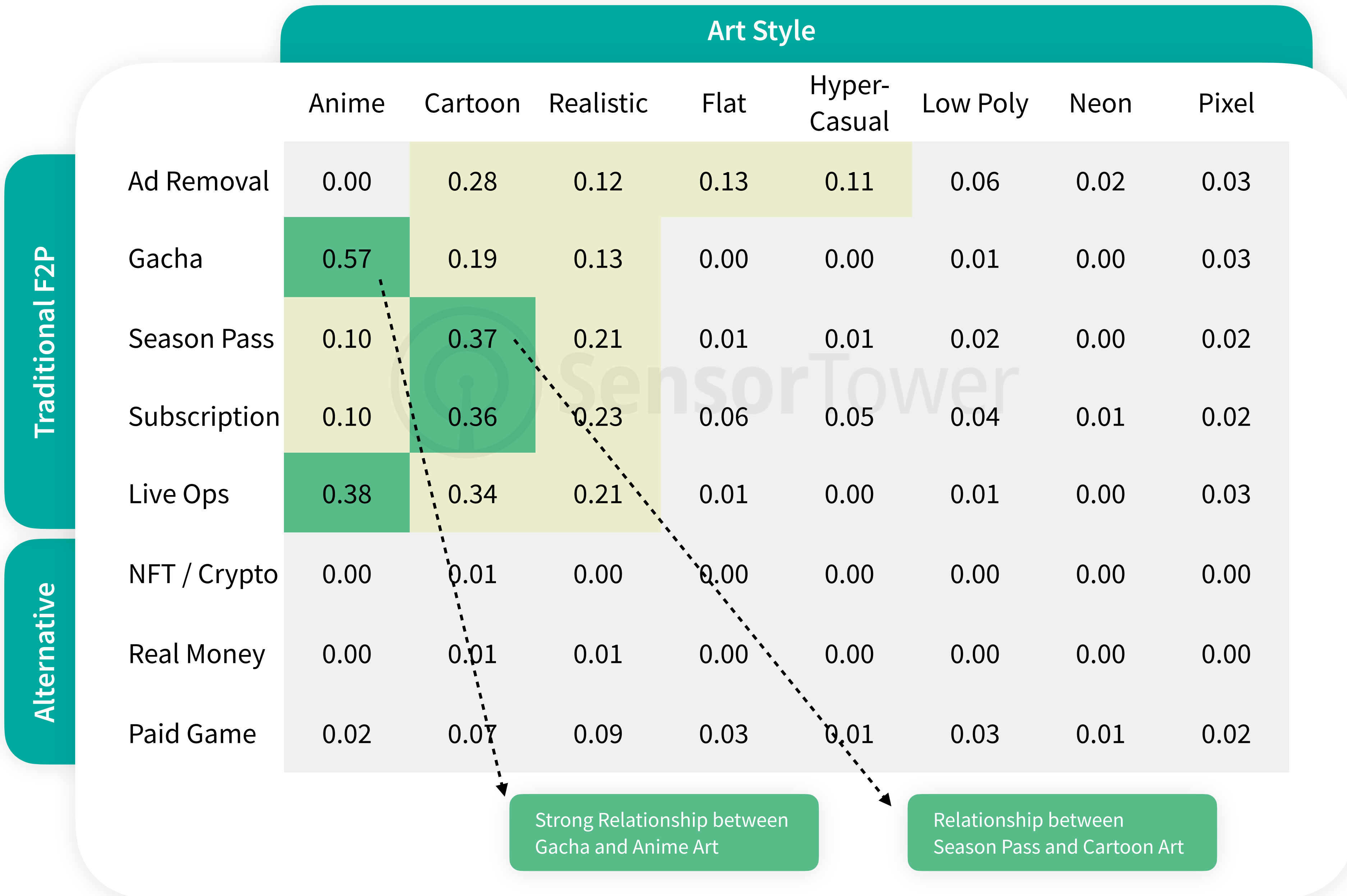
While traditional free-to-play mechanics are intertwined, emerging and alternative monetization methods such as Real Money and NFT/Crypto typically show a weak relationship with other features.

### Jaccard Index

The Jaccard index is a statistic used for gauging the similarity and diversity of sample sets where binary data is used. The index is defined between 0 and 1. The higher the value, the stronger the relationship between the two sets.

# Gacha Exhibits Strong Relationships with Anime Art Style

Jaccard Index Matrix of Monetization and Art Style descriptors



Monetization features can be crossed with other elements of Sensor Tower’s game taxonomy for deeper insights into the market.

Gacha is a very popular monetization mechanic in Japan, and Sensor Tower data reveals a strong association with games that feature Gacha features and the Anime Art Style, which is also hugely popular in Japan.

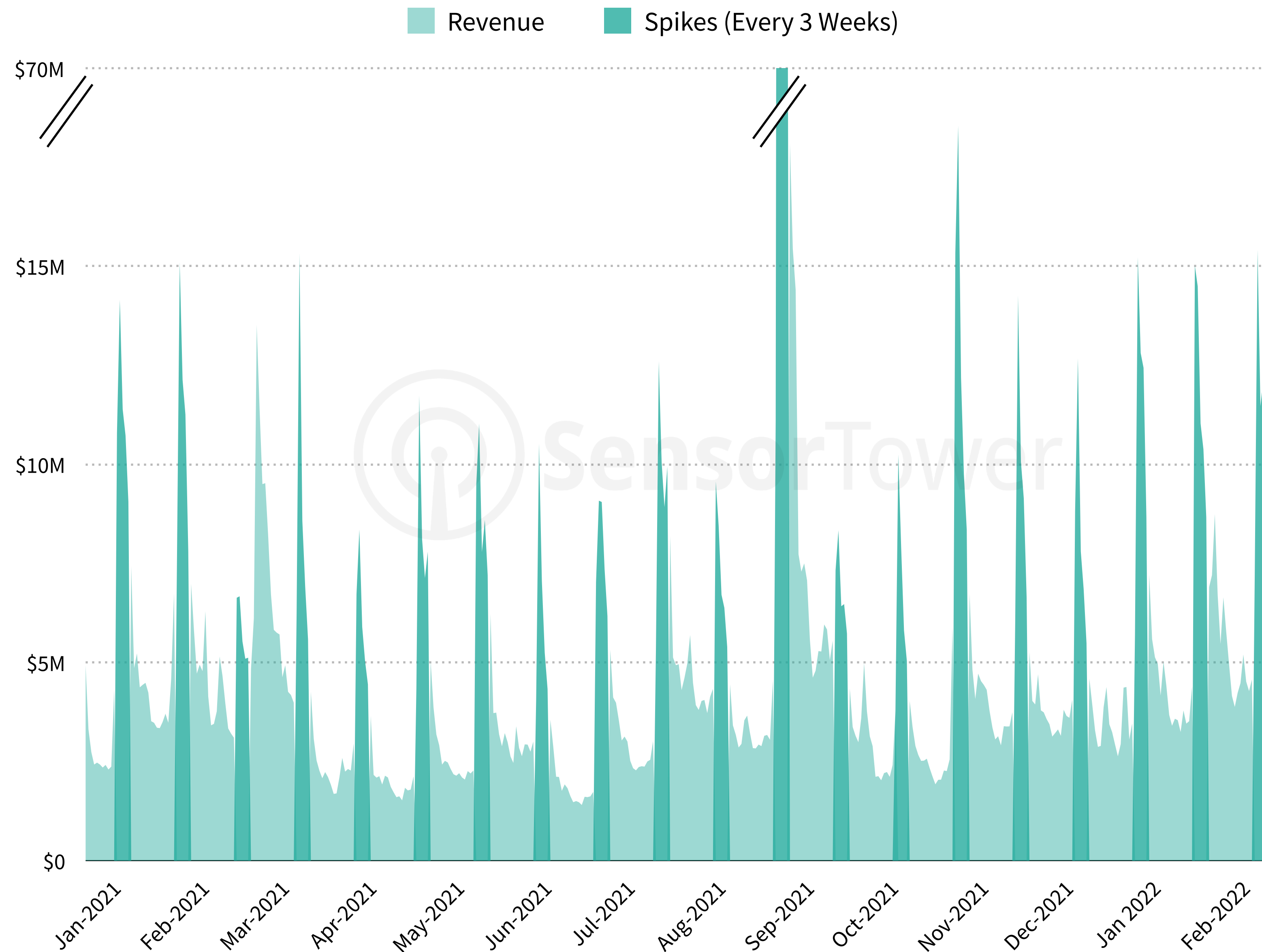
The Cartoon Art Style, which includes titles such as Lords Mobile, Clash of Clans, and Gardenscapes, also shows a strong relationship with the Season Pass and Subscription monetization descriptors.

### Jaccard Index

The Jaccard index is a statistic used for gauging the similarity and diversity of sample sets where binary data is used. The index is defined between 0 and 1. The higher the value, the stronger the relationship between the two sets.

# Gacha Propels Genshin Impact to Global Success

Worldwide daily revenue of Genshin Impact on the App Store and Google Play



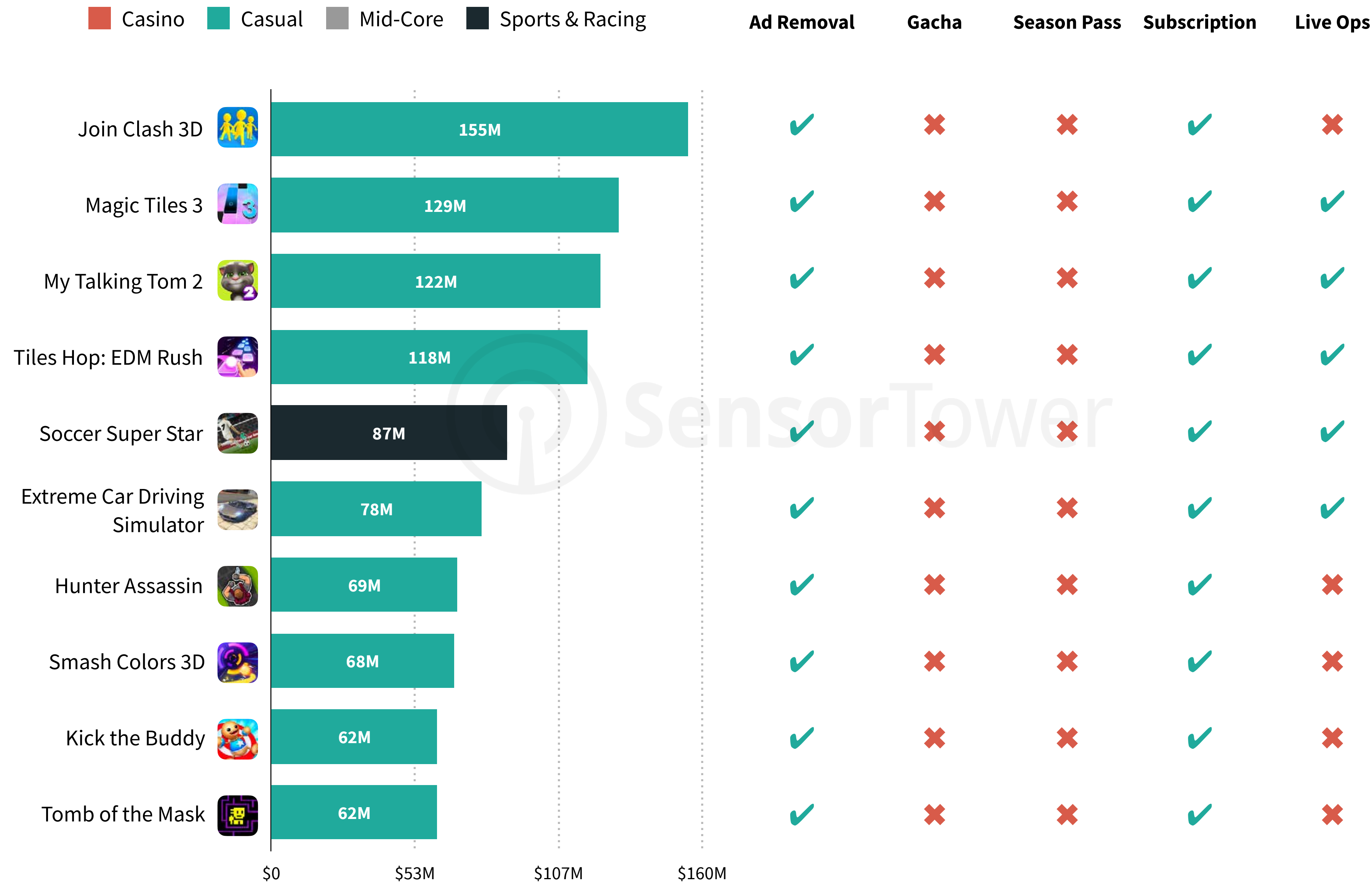
In the previous analyses, we showed a strong relationship between Gacha, Live Ops, and the Anime art style. One of the leading titles that utilizes all of these is the global hit Genshin Impact from miHoYo, which generated \$2 billion globally across the App Store and Google Play in its first year since launching in 2020.

Genshin Impact monetizes through a Gacha system where players can pull new characters, with fresh releases on a three-week cadence to keep them engaged. As illustrated by this chart, there is a clear correlation between the release of new characters and spikes in daily revenue.

In September 2021, Version 2.1, known as Floating World Under the Moonlight, was launched ahead of the game's anniversary celebrations, providing new characters such as Raiden Shogun. The update also saw the introduction of never-before-seen islands for players to explore, as well as a new weapon event wish and fishing system.

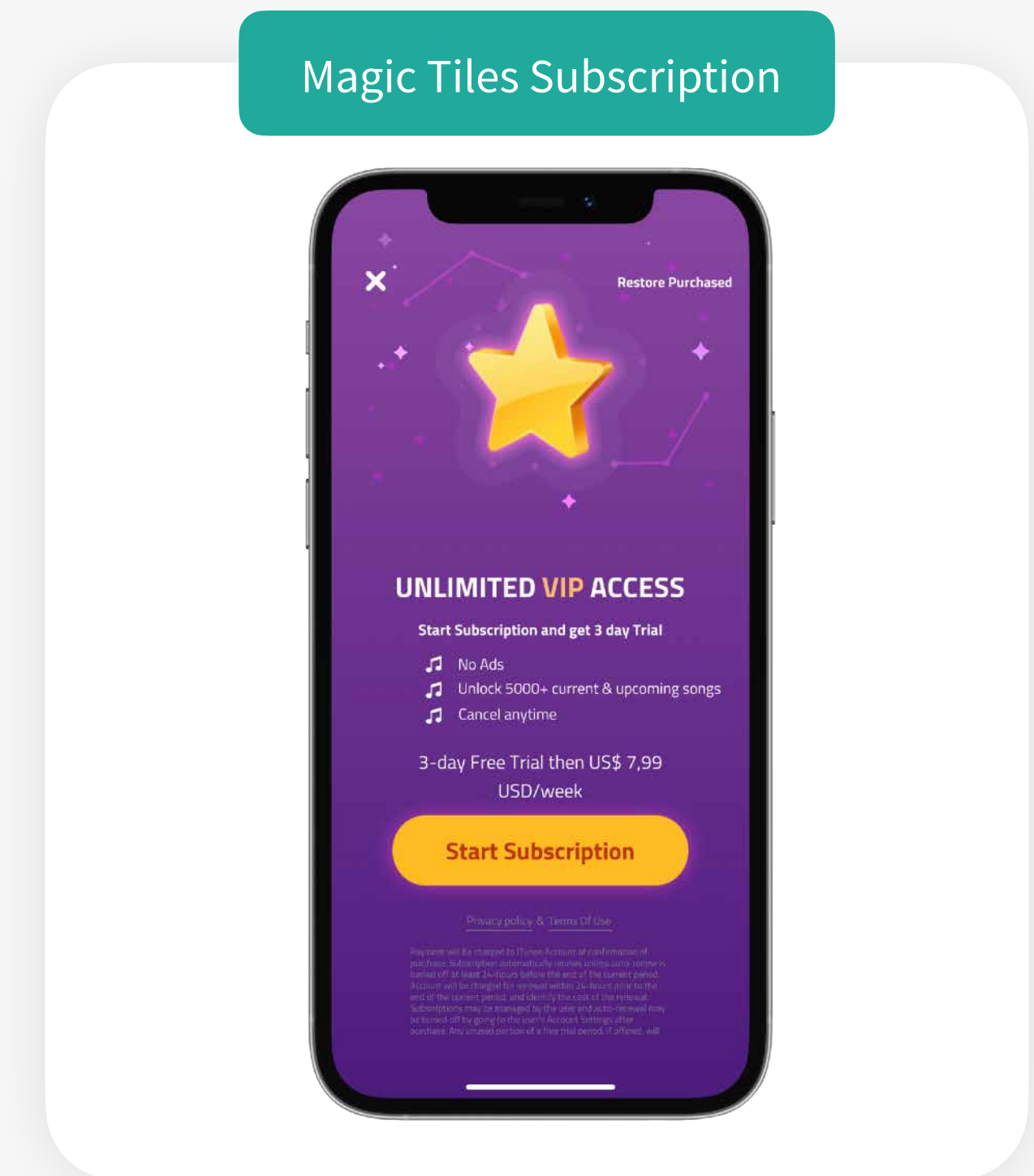
# Casual Packages Subscription with Ad Removal

Top 10 games by worldwide downloads in 2021 with Ad Removal and Subscription



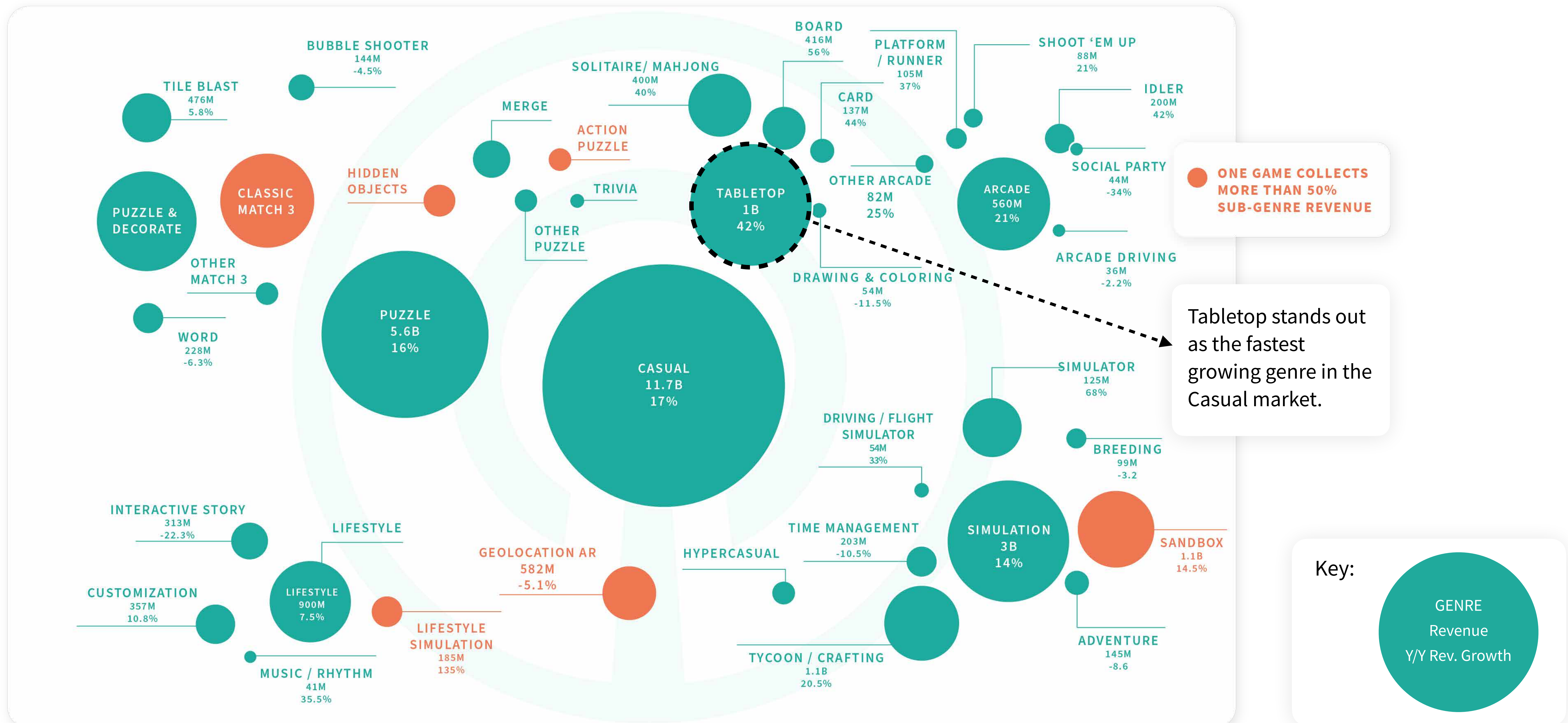
There is a strong synergy between Ad Removal and Subscription monetization, particularly in casual titles where ads are more prominent.

The overlap between the two options is sometimes present where Ad Removal is included as part of a Subscription. In the case of Magic Tiles 3, a Subscription model has a greater chance of success as it is offered in tandem with Live Ops support, making such monetization more appropriate than it would be in a Hypercasual title, for example.



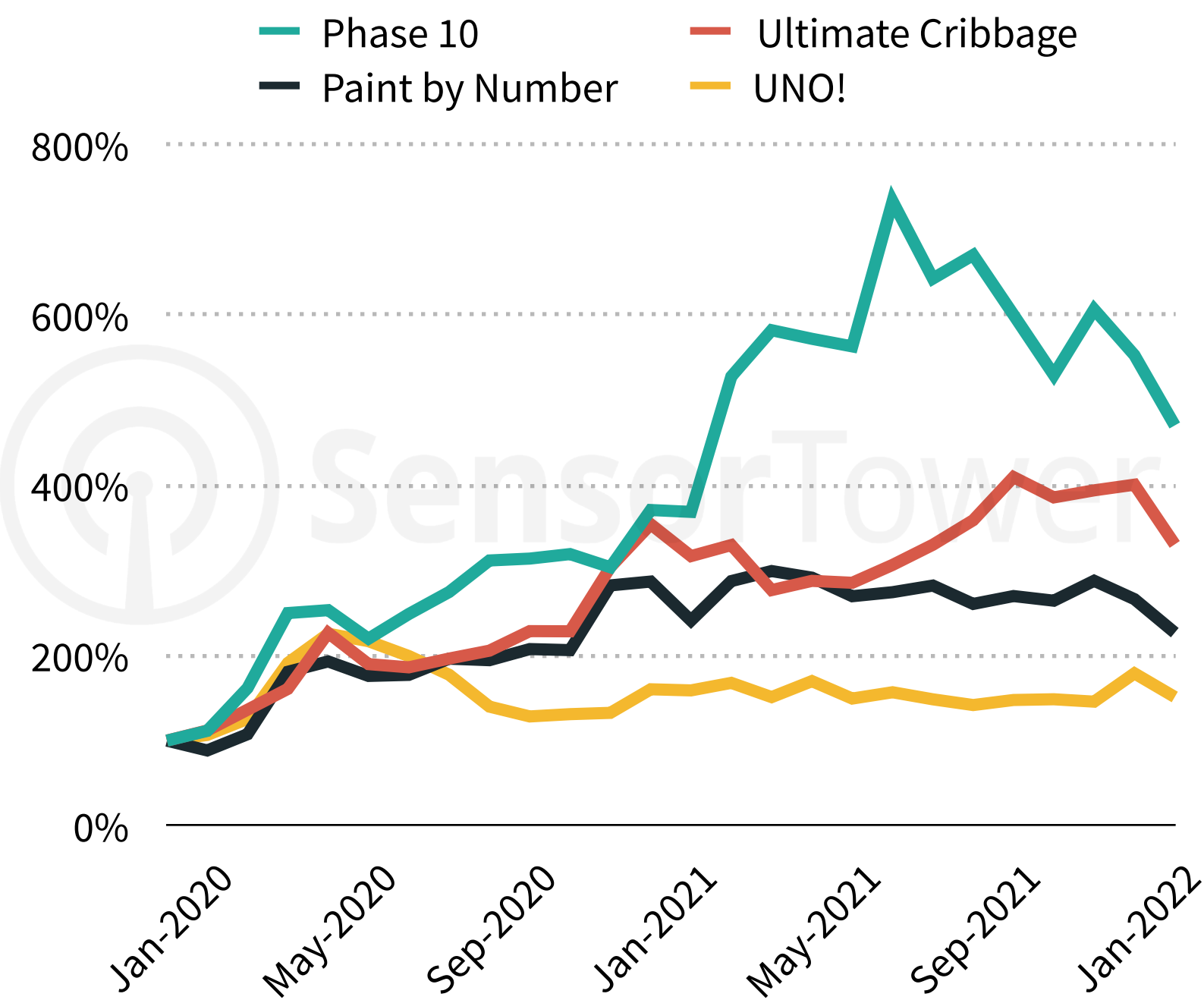
# Tabletop Is the Fastest Growing Genre in Casual

Revenue in 2021 by game genre in Western markets



# Tabletop Adopts Ad Removal

Monthly revenue growth vs. January 2020 for Tabletop titles, including monetization descriptors



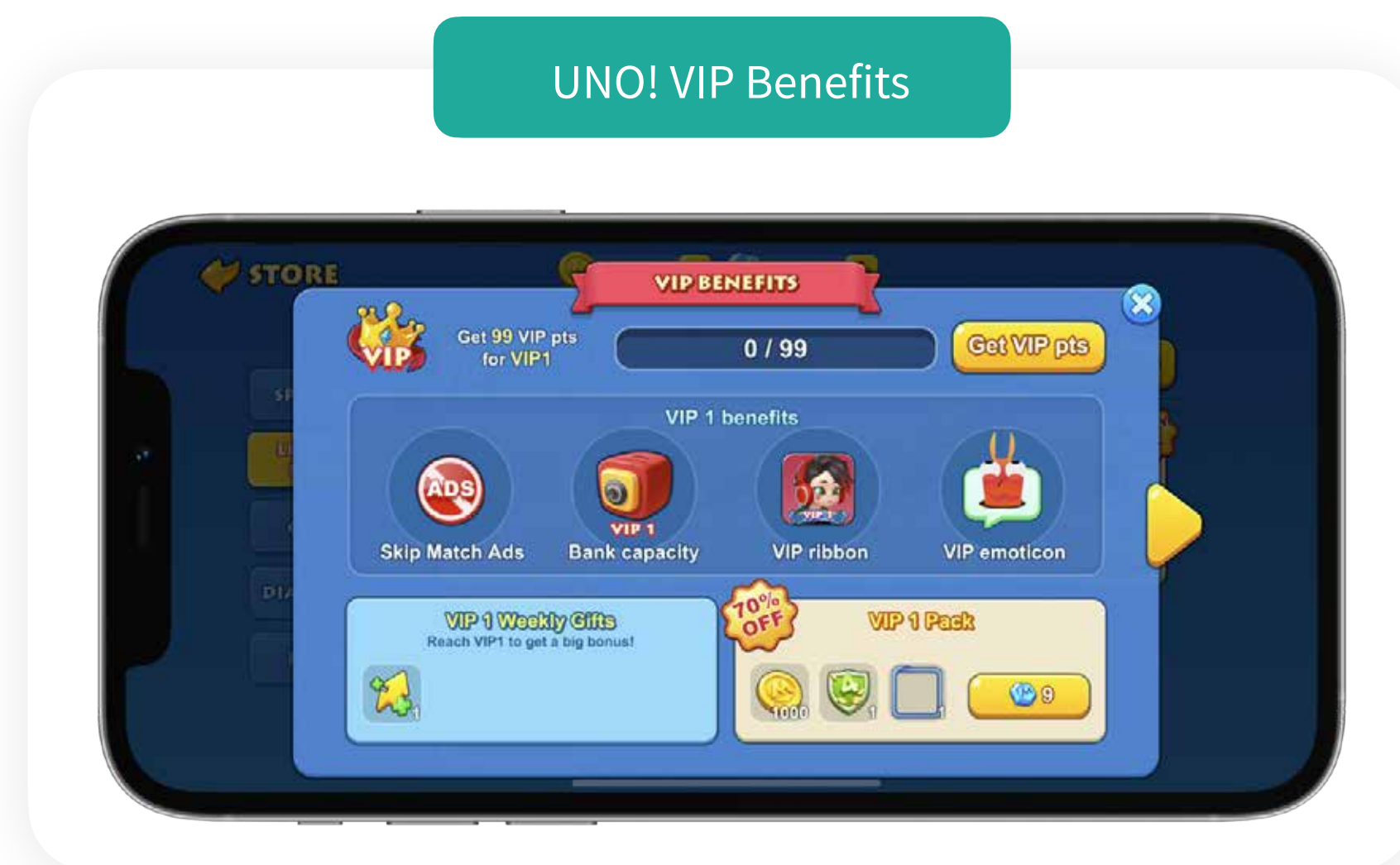
Game	Ad Removal	Subscription	Live Ops
Phase 10	✓	✓	✓
Ultimate Cribbage	✓	✗	✗
Paint by Number	✓	✓	✗
UNO!	✓	✓	✓

Mobile Tabletop games saw a 42 percent year-over-year increase in player spending during 2021 in Western markets, accumulating \$1 billion.

Some Tabletop titles, such as Phase 10 and UNO! from Mattel, have successfully implemented Ad Removal mechanics.

While some large Tabletop IPs have made the transition to mobile as premium titles, others have adopted an ad-based free-to-play model to find success, including an Ad Removal option for the most engaged players.

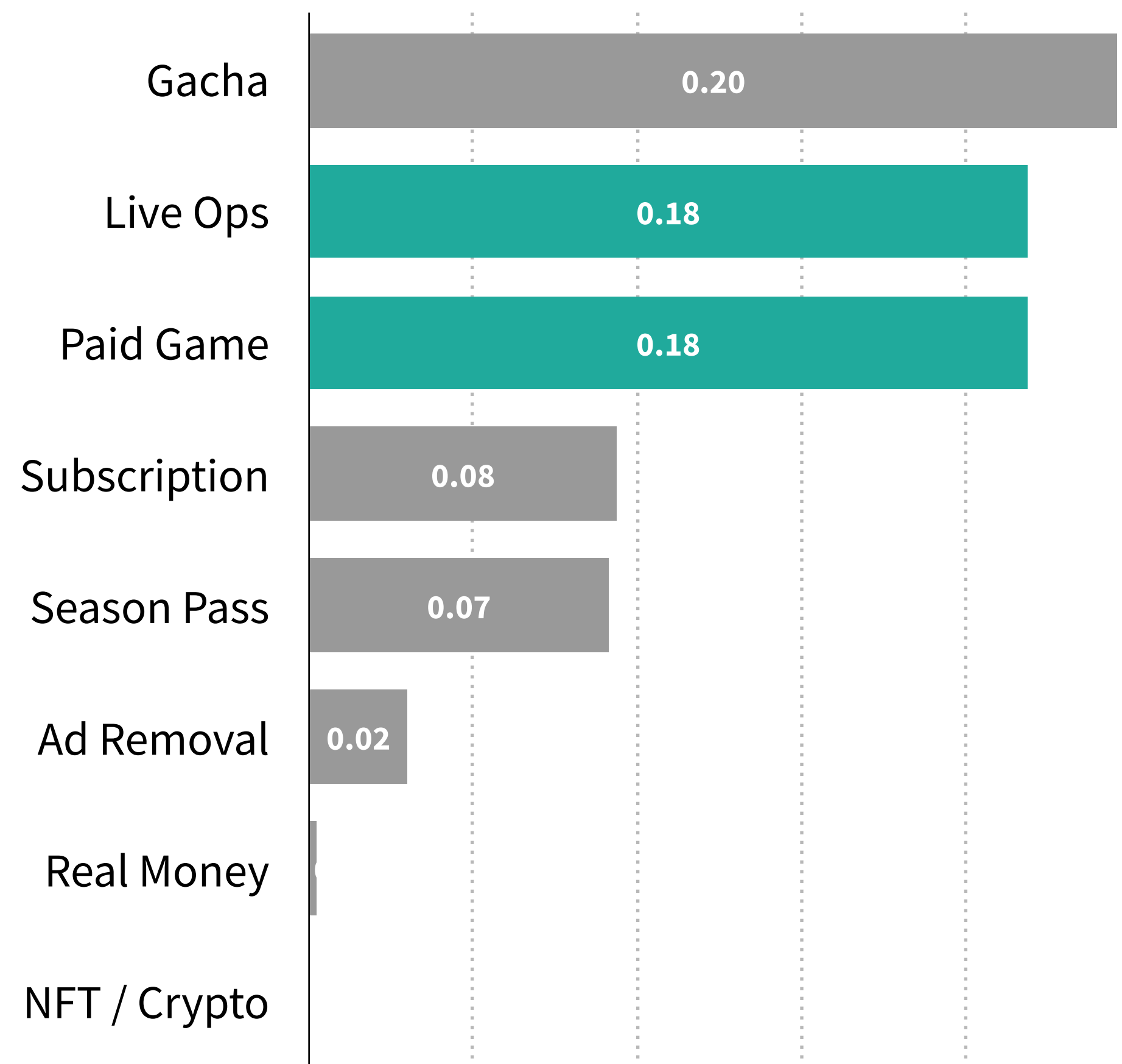
As seen in other Casual titles, Ad Removal can sometimes be packaged with a Subscription, as seen in UNO!



# Most IPs Adopt F2P and Live Ops, While Some Premium Franchises Remain as Paid Games

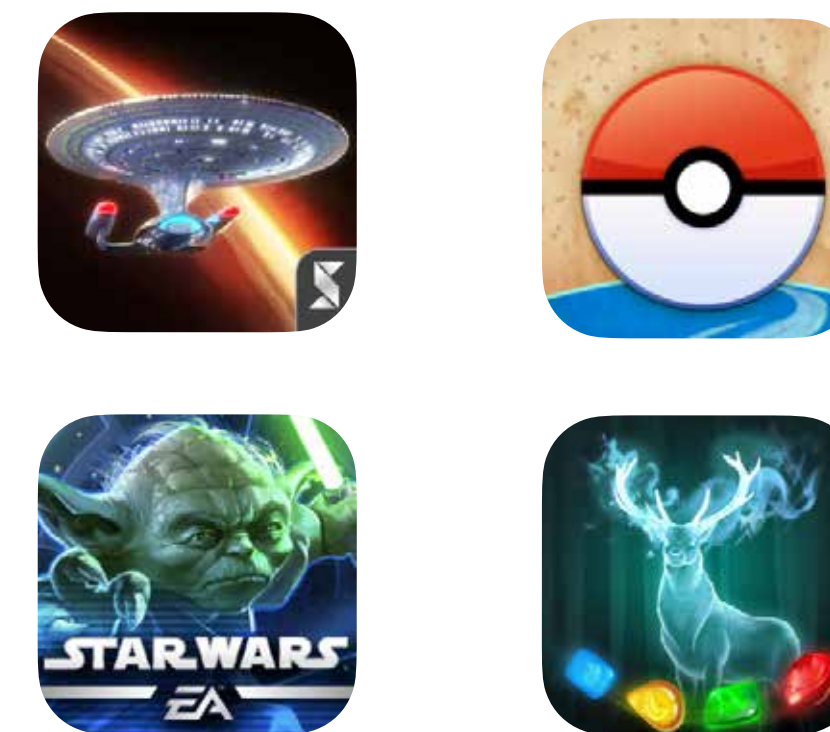
## IPS + Monetization

Jaccard Index between IPs and Monetization type



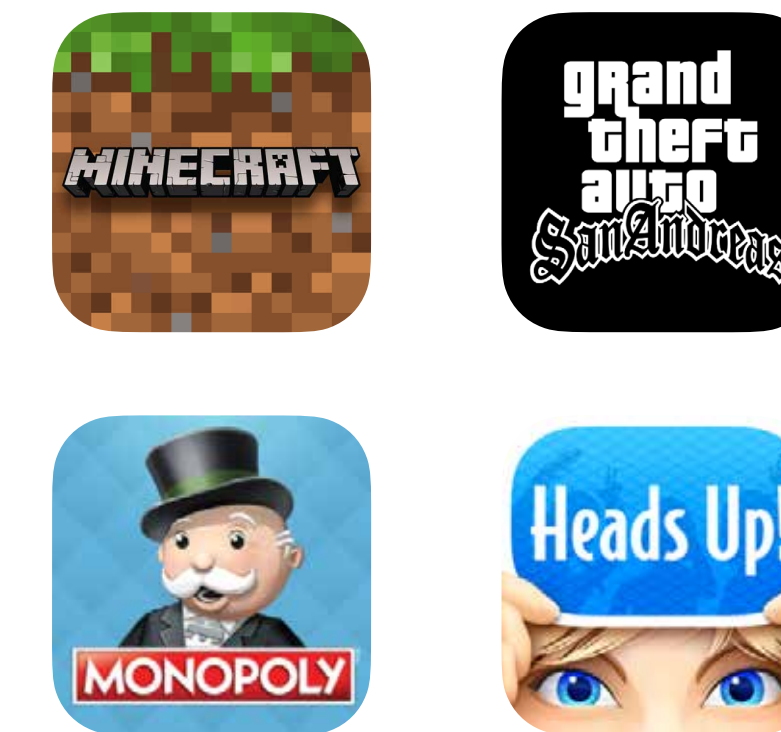
## Options for IP Holders

### F2P + Live Ops



Top 10 U.S. Games in 2021  
Revenue: \$1.5B

### Paid Game



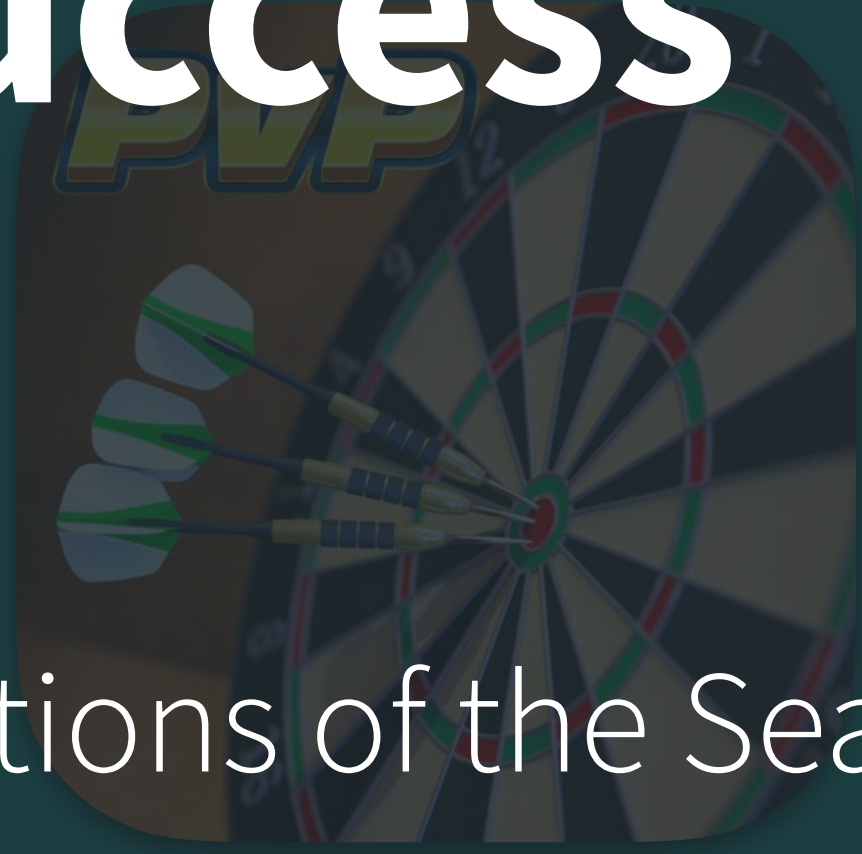
Top 10 U.S. Games in 2021  
Revenue: \$132M

 Sensor Tower



# Season Pass Success Stories

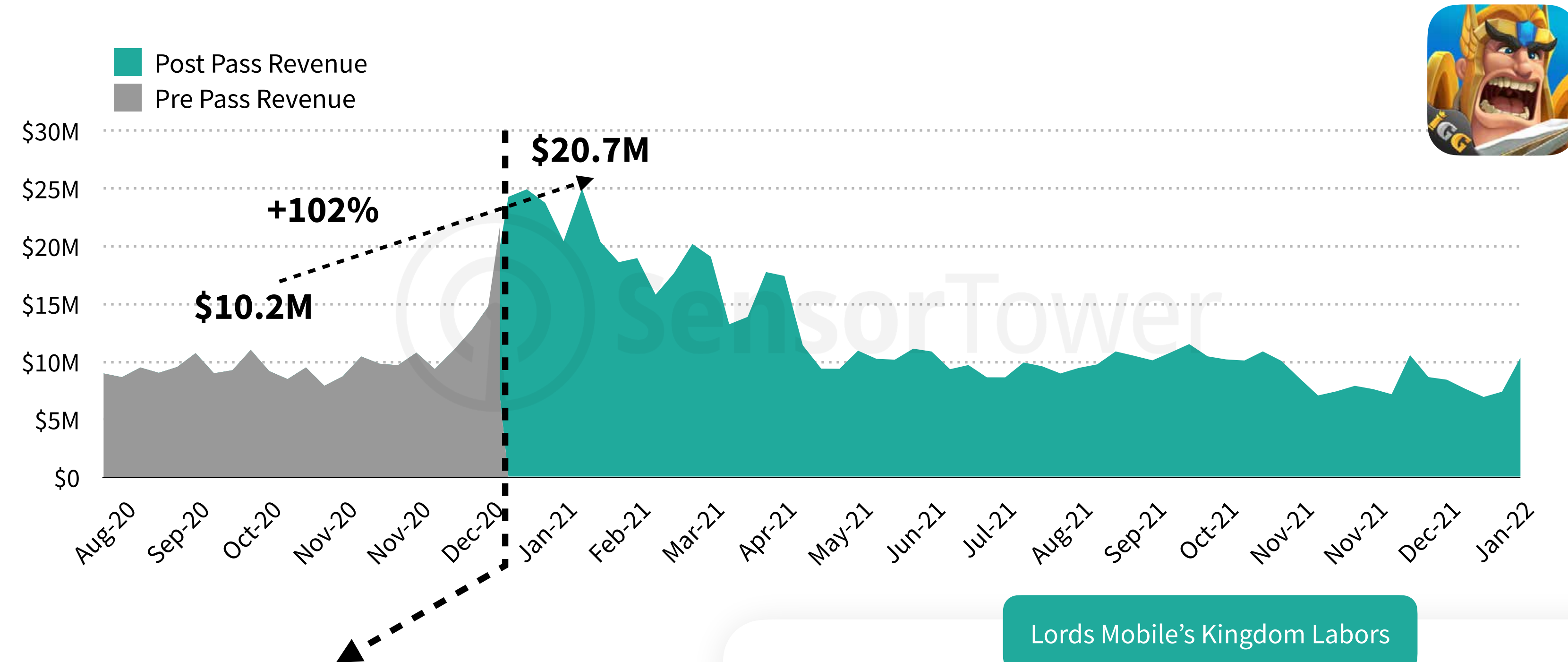
— Analyzing Different Implementations of the Season Pass Mechanic





# Season Pass Sparks 2X Revenue Increase in Lords Mobile

Worldwide weekly revenue of Lords Mobile on the App Store and Google Play



Player spending in Lords Mobile from IGG, released in 2016, doubled week-over-week to \$20.7 million in January 2021 following the introduction of the game’s new Season Pass, dubbed Kingdom Labors, Sensor Tower Store Intelligence data shows.

Lords Mobile players are able to purchase a monthly Gold Pass or use the default Silver Pass. Players can obtain prizes in return for completing weekly tasks.

## Season Pass Implementation

Lords Mobile Version 2.37:

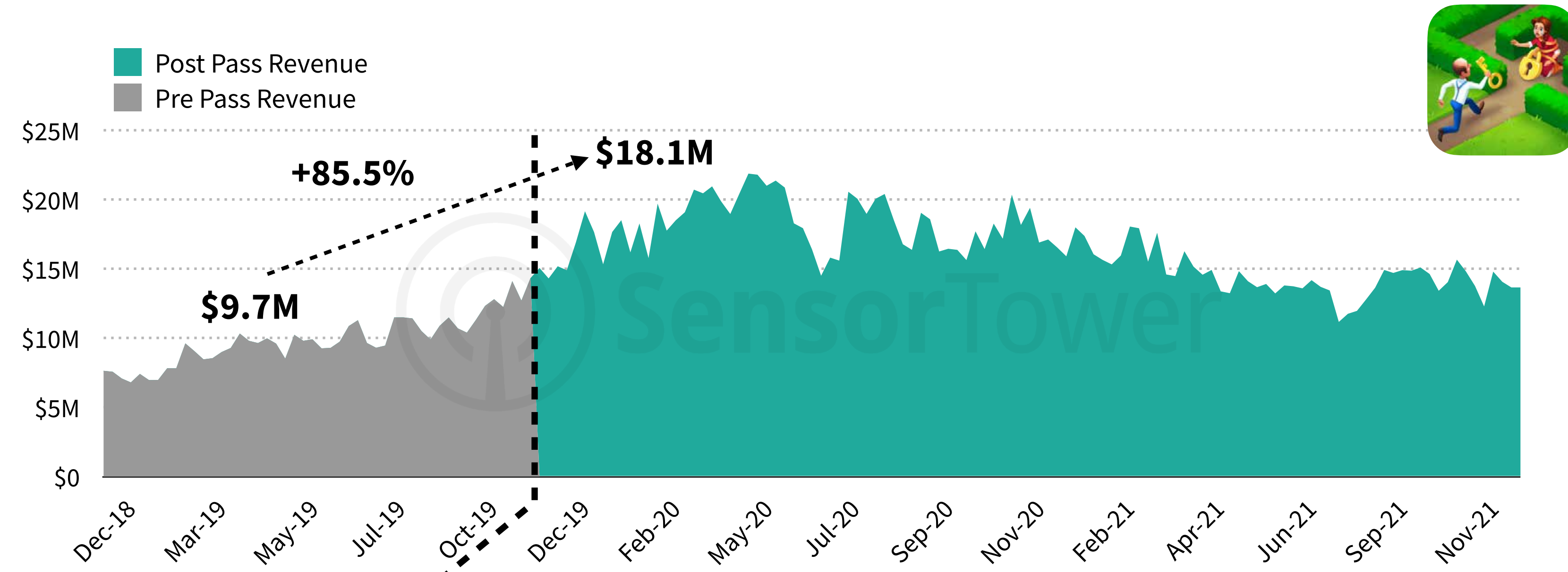
- New Event: Kingdom Labors
- Complete labors to earn event points and claim rewards, including this month’s special: the Technolabe! Get the **[Gold Pass]** to claim more rewards!

## Lords Mobile’s Kingdom Labors



# Season Pass Expands to Other Genres

Worldwide weekly revenue of Gardenscapes on the App Store and Google Play



Season Pass monetization was first popularized with Fortnite before expanding to the wider Shooter market, helping to solve the lack of progression in these titles while also providing a regular reset that puts players back to the same level.

Other genres that lack a progression layer such as Puzzle can also benefit from increased engagement. Gardenscapes is one such title that has successfully integrated a Season Pass system, with revenue increasing by 85 percent week-over-week following its introduction.

## Season Pass Implementation

Gardenscapes Version 3.9.0:

### Furry Season

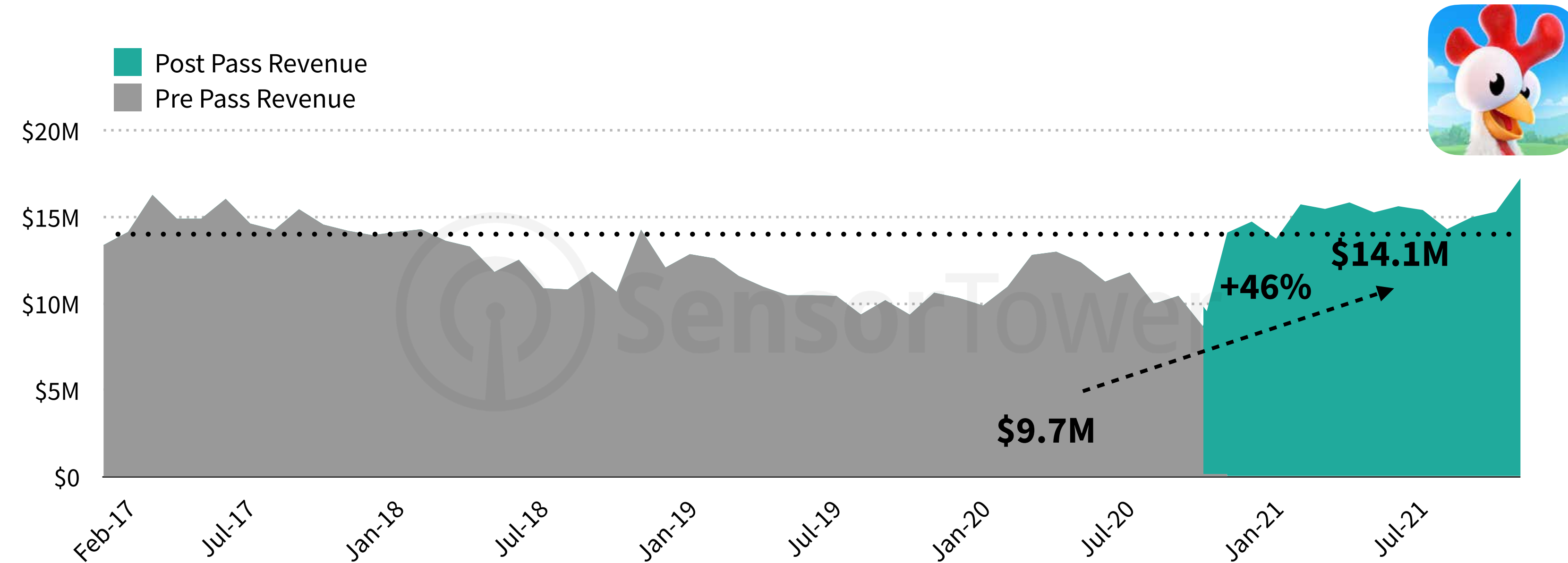
- Take part in the first long event: beat levels to win rewards throughout the entire season!
- Unlock unique prizes with the Golden Ticket.
- The biggest reward of the season is a new cat called Missy!

## Gardenscapes's Furry Season



# Season Pass Can Revitalize Legacy Titles

Worldwide monthly revenue of Hay Day on the App Store and Google Play



Released 10 years ago, Hay Day was the first mobile title launched globally by Supercell. The introduction of the Farm Pass in December 2020 helped revitalize player spending in this legacy title, with revenue rising by 46 percent week-over-week.

As a result of the Farm Pass, Hay Day has seen revenue rise to levels not seen since 2017, now surpassing \$14 million on average per month.

Supercell has found some success with the Season Pass system, implementing it across its portfolio in titles such as Clash of Clans, Clash Royale, and Brawl Stars.

## Season Pass Implementation

Hay Day Version 1.48.149:

Our FARMtastic update is finally here!

Introducing: Farm Pass, featuring the baby chicks!

- Farm Pass runs every month. You can earn extra rewards as well as fun, game-enhancing perks!
- Complete goals to gain pass points and follow the baby chick along the Farm Pass road.

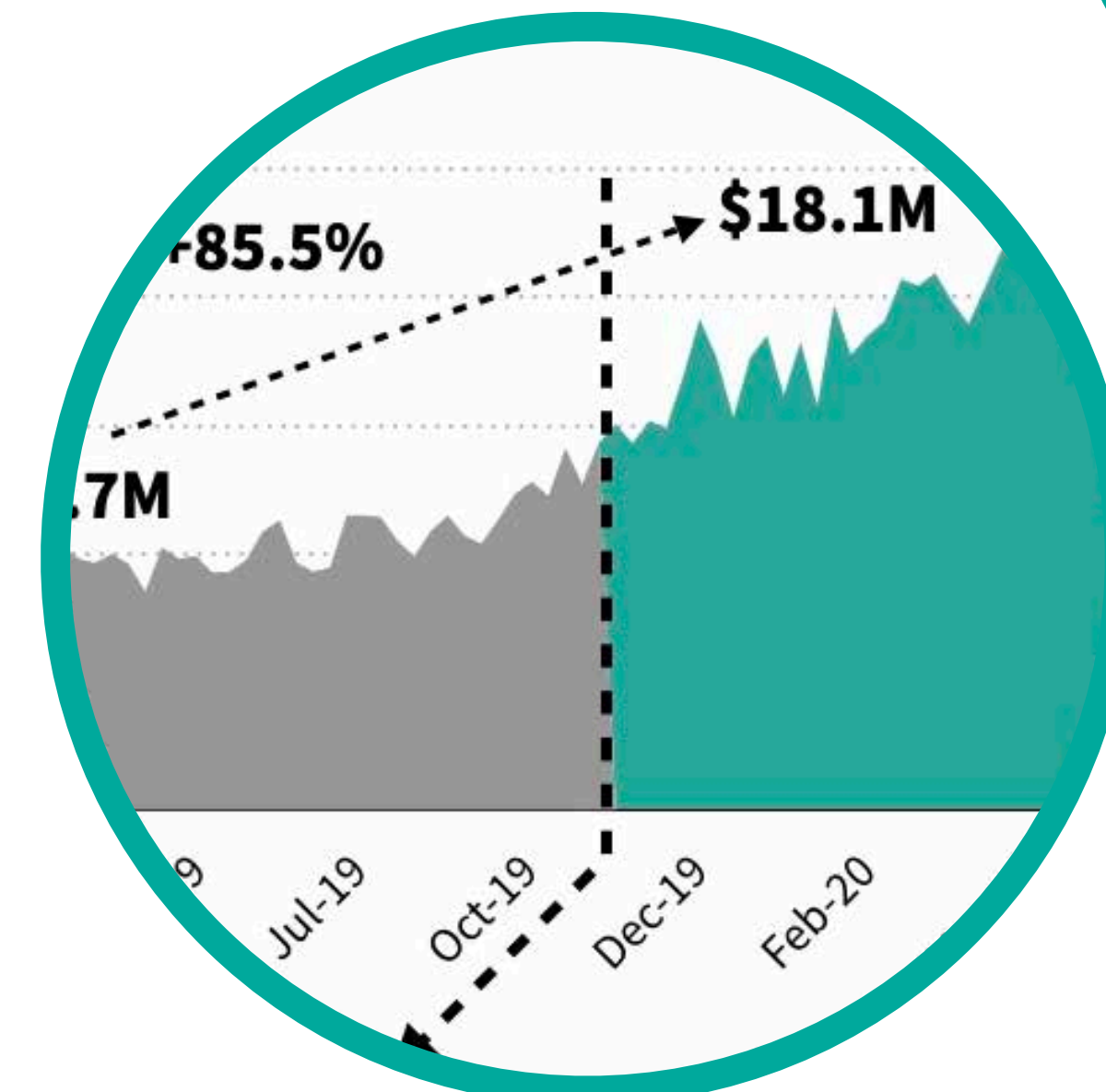
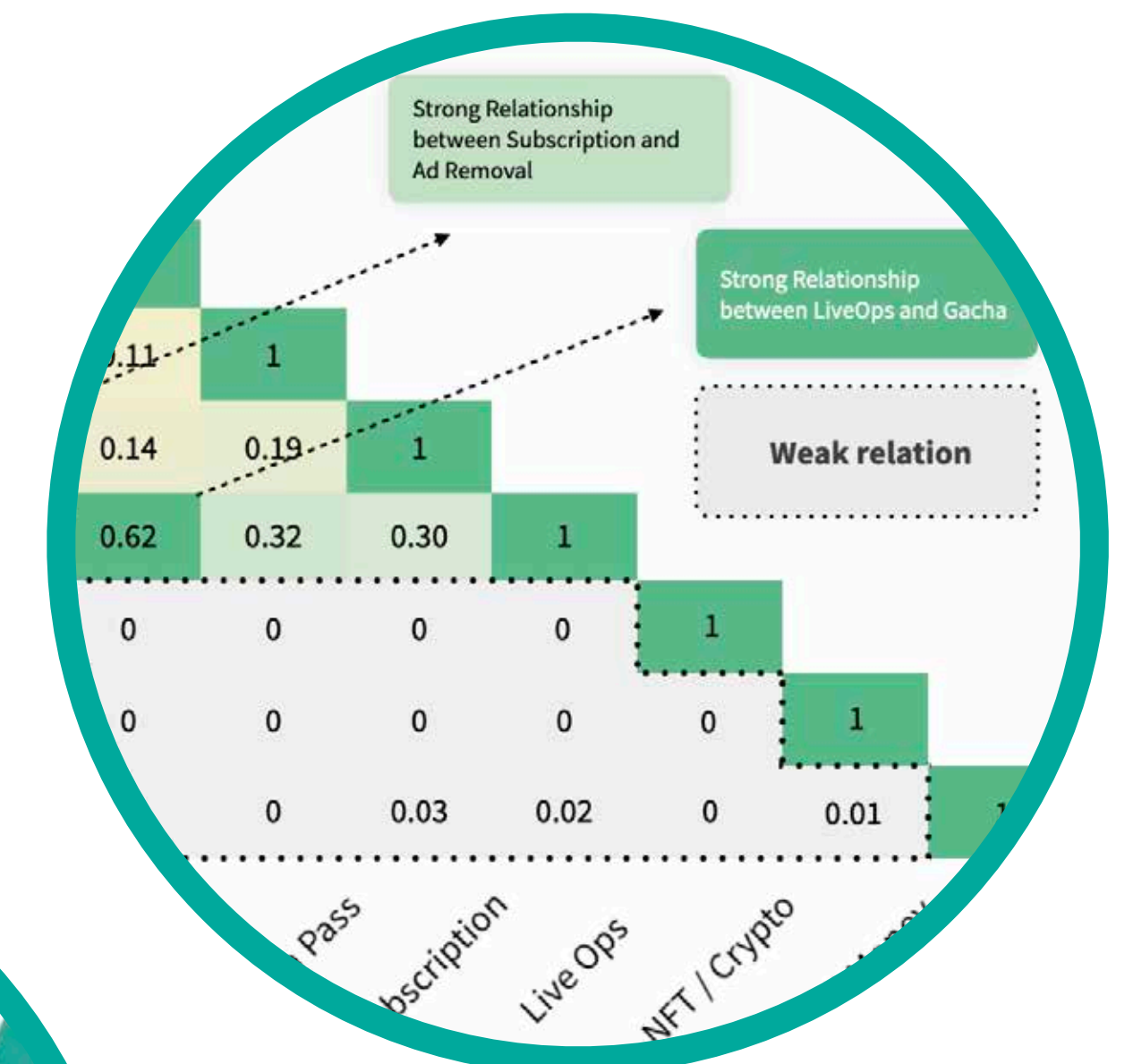
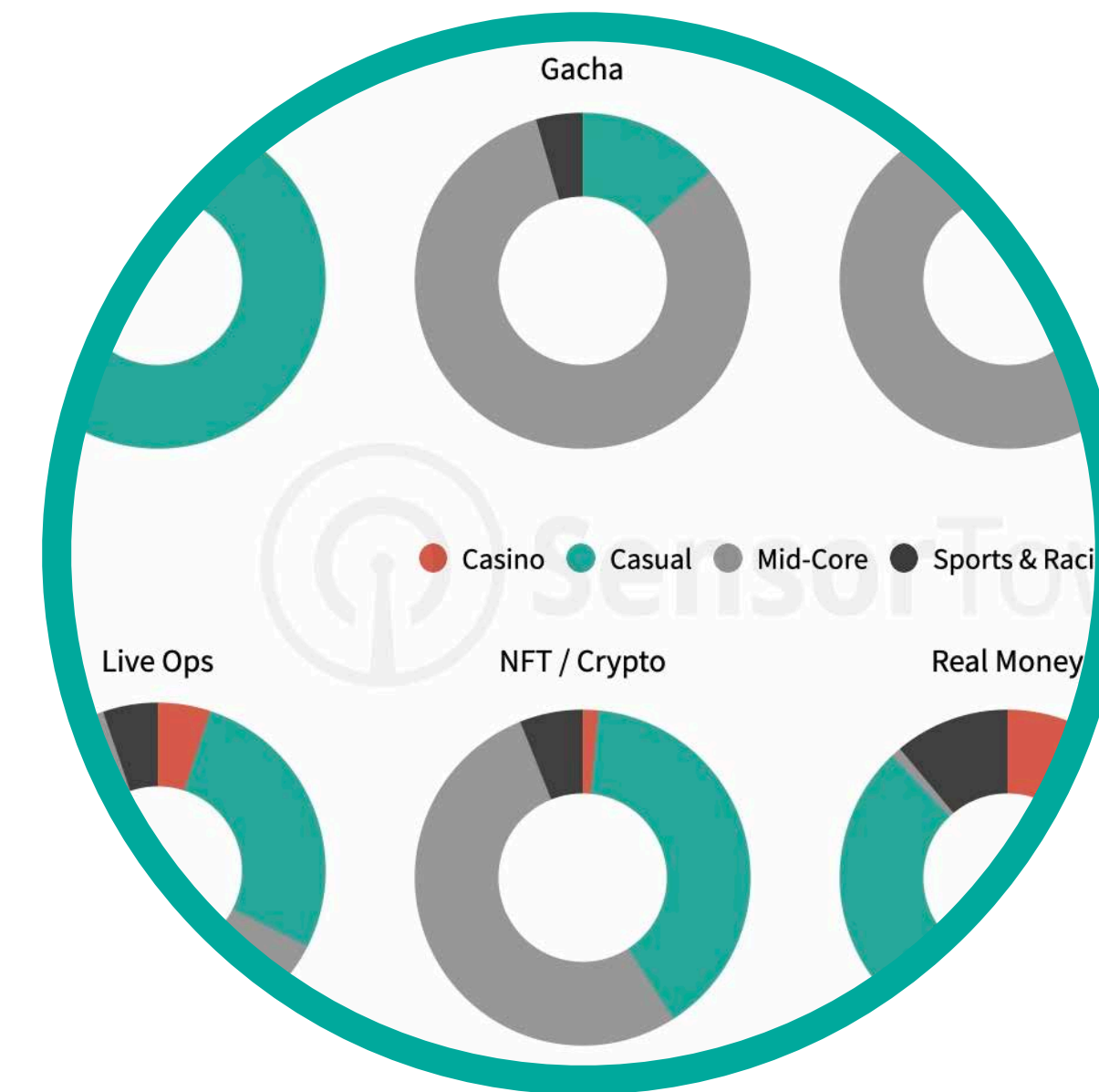
## Hay Day's Farm Pass



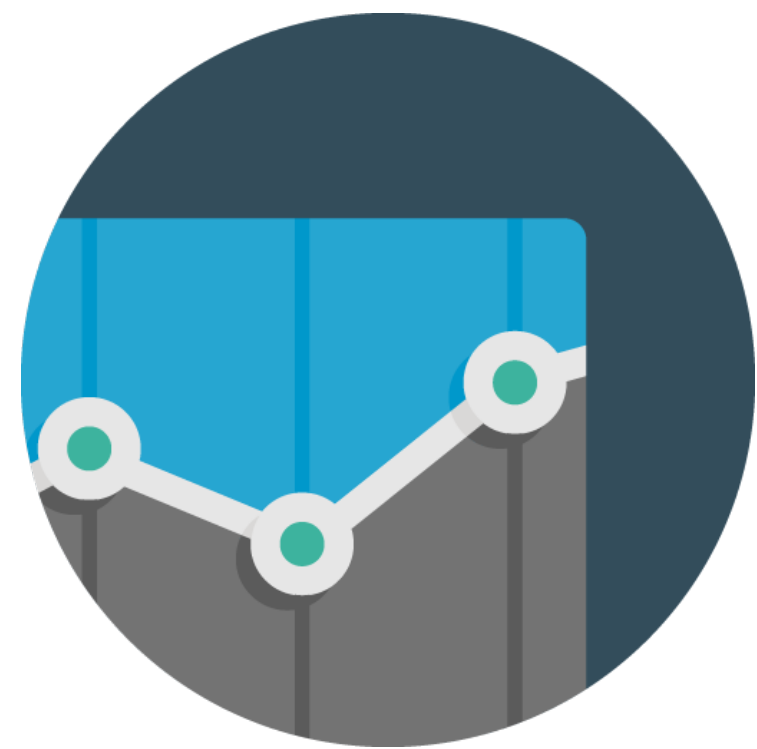
# Conclusion

# Conclusion

- The nascent NFT / Crypto space currently encompasses a diverse range of classes from mid-core to casual, showing early experimentation to find the most monetizable audience.
- While traditional free-to-play mechanics are intertwined, emerging and alternative monetization methods such as Real Money and NFT/Crypto typically show a weak relation with other features.
- Gacha is a very popular monetization mechanic in Japan, and has a strong association with games that feature Gacha features and the Anime Art Style, also popular in Japan.
- There is a strong synergy between Ad Removal and Subscription monetization, particularly in casual titles where ads are more prominent. The overlap between the two options is sometimes present where Ad Removal is included as part of a Subscription. This combination of mechanics is not often used in the ad-driven Hypercasual market, as the lack of long term retention does not justify a subscription model.
- While some large Tabletop IPs have made the transition to mobile as premium titles, others have adopted an ad-based mobile free-to-play model to find success, including an Ad Removal option for the most engaged players.
- The Season Pass monetization model, popularized by Fortnite and implemented across the Shooter ecosystem, has been integrated into a wider variety of genres, as shown with successful introductions in titles like Gardenscapes, Hay Day, and Lords Mobile. Season Passes can act as a method to monetize genres that otherwise might typically lack a full-fledged progression system. Its success proves that monetization mechanics can be extrapolated to other game genres.



# Sensor Tower Solutions



## Store Intelligence

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



## App Intelligence

Drive organic growth with the leading App Store Optimization platform.



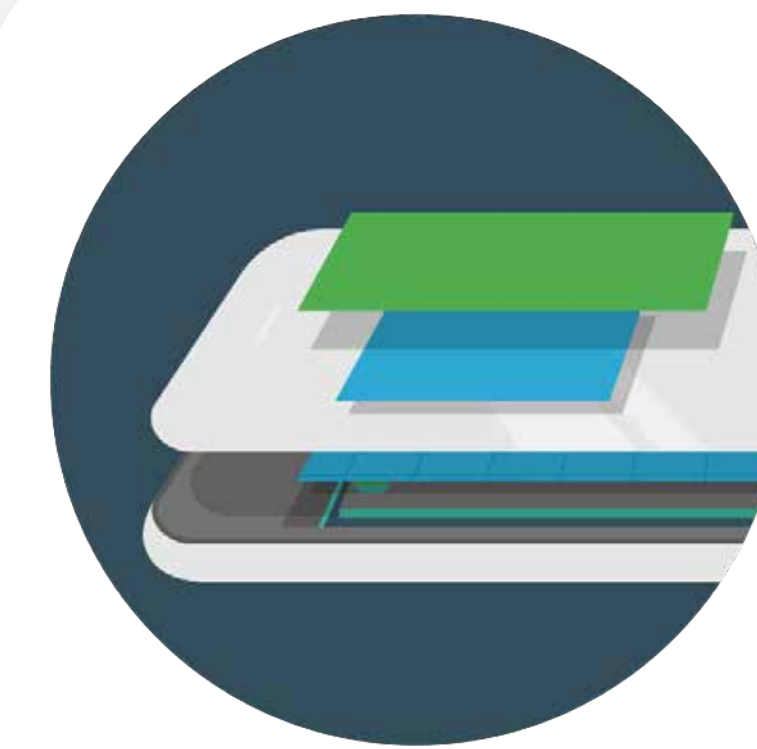
## Ad Intelligence

Develop winning User acquisition campaigns with crucial mobile advertising insights.



## Usage Intelligence

Benchmark app usage, engagement, and demographics.



## App Teardown

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



## Consumer Intelligence

Access unfiltered mobile user engagement for financial analysis.

# 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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