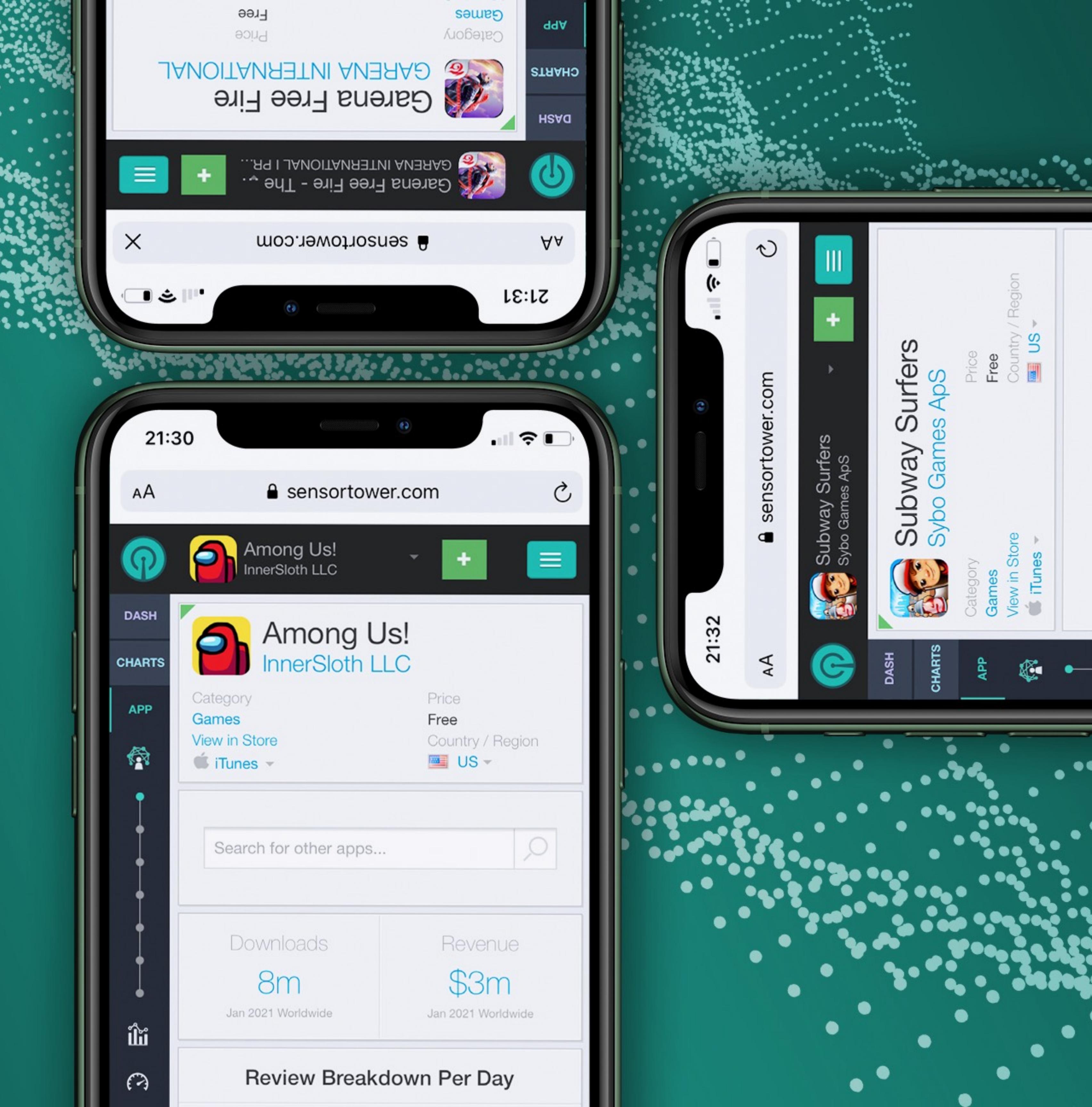




Mobile Game Taxonomy Report 2021

Analyzing the Driving Forces Behind the Latest Mobile Game Genre Trends



Game Taxonomy Report: Table of Contents

The 2021 Mobile Game Taxonomy Report offers analysis on the latest gaming trends by genre:

3. Gaming Overview

An overview of the game industry in 2020 along with top categories and top apps

17. Game Intelligence

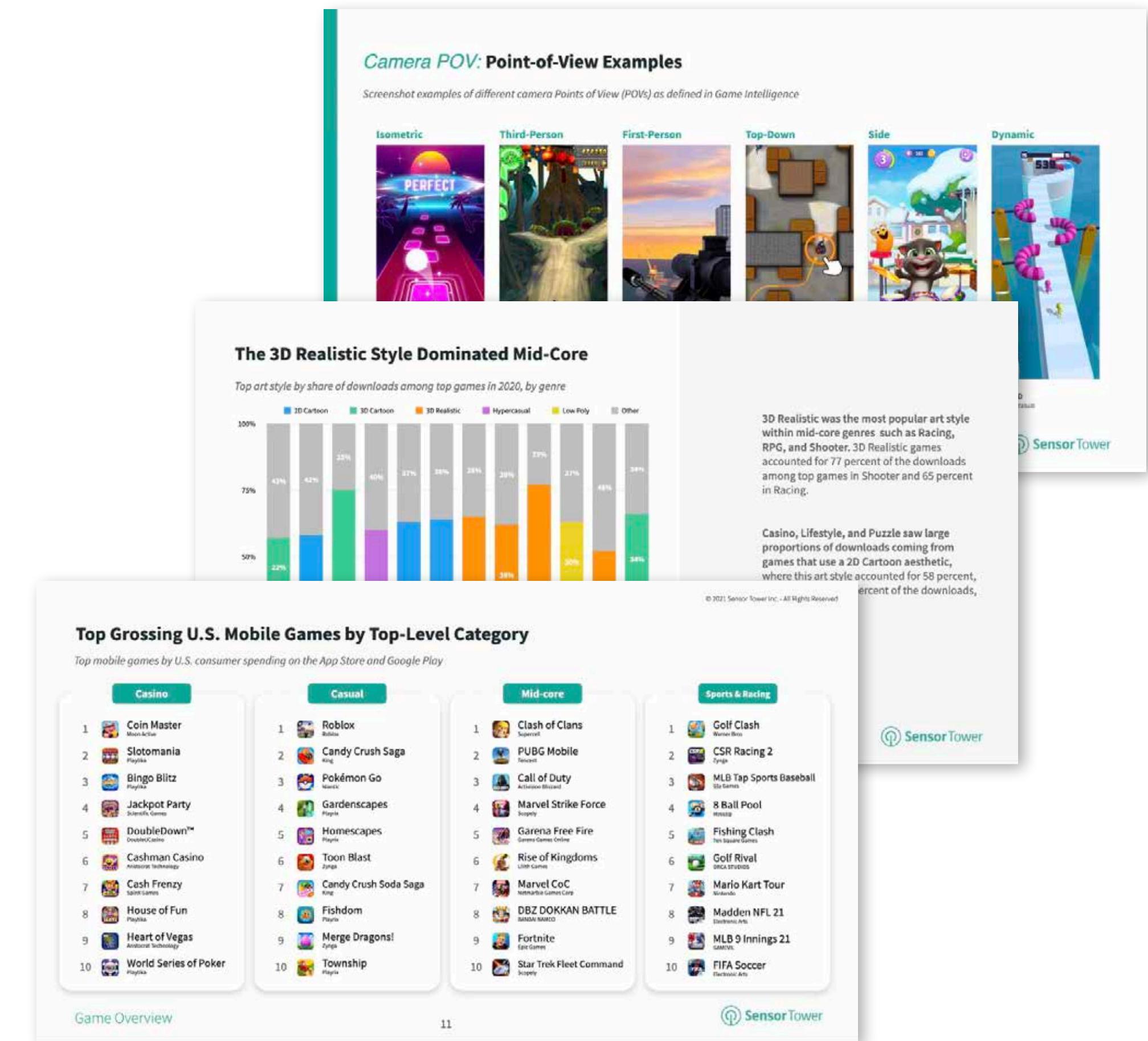
Intro to Sensor Tower Game Intelligence and gameplay types

27. Gameplay Trends

Emerging gameplay trends and popular themes

37. Conclusion

A summary of key takeaways from the report

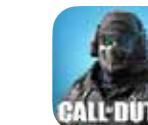
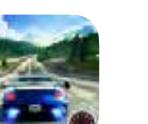
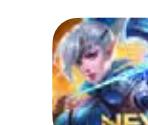
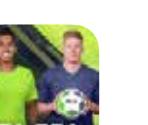




Market Overview

Top Mobile Games Worldwide in 2020 by Top-Level Category

Top mobile games globally by App Store and Google Play downloads

Casino			Casual			Mid-core			Sports & Racing		
1		Coin Master Moon Active	1		Among Us InnerSloth	1		Garena Free Fire Garena Games Online	1		8 Ball Pool Miniclip
2		Slots (Golden HoYeah) International Games System	2		Subway Surfers Sybo Games ApS	2		PUBG Mobile Tencent	2		Hill Climb Racing Fingersoft
3		Luxy Poker Gamesofa	3		Hunter Assassin Ruby Game Studio	3		Sniper 3D Fun Games For Free	3		Traffic Rider Soner Kara
4		Lucky Toss 3D Lucky Coins	4		Gardenscapes Playrix	4		Call of Duty: Mobile Activision Blizzard	4		Pooking Mountain Game
5		Zynga Poker Zynga	5		Brain Out Focus apps	5		Brawl Stars Supercell	5		Street Racing 3D Ivy
6		Jungle Rummy Junglee Games	6		Ludo King Gametion	6		Mobile Legends Moonton	6		Racing in Car 2 Fast Free Games
7		Teen Patti Gold Moonfrog	7		Tiles Hop Amanotes	7		Real Commando GAMEXIS	7		Real Bike Racing Italic Games
8		Teen Patti by Octro Octro	8		Homescapes Playrix	8		Cover Strike Free Actions	8		Dream League First Touch Games
9		Slotomania Playtika	9		Roblox Roblox	9		FPS Commando Hazel Mobile Games	9		Mario Kart Tour Nintendo
10		POP! Slots PlayStudios	10		Candy Crush Saga King	10		Critical Action Free Actions	10		Asphalt 8 Racing Gameloft

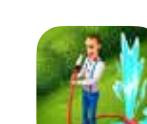
Top U.S. Mobile Games in 2020 by Top-Level Category

Top mobile games in the United States by App Store and Google Play downloads

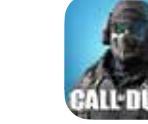
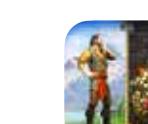
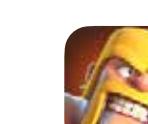
Casino

1		Coin Master
2		Blackout Bingo
3		Lucky Pusher
4		Dice Royale
5		Lucky Day
6		Cash Frenzy
7		Plinko Master
8		Coin Dozer
9		World Series of Poker
10		FOX Bet Super 6

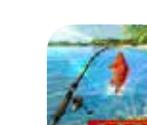
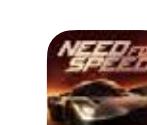
Casual

1		Among Us
2		Roblox
3		Subway Surfers
4		Brain Test
5		Magic Tile 3
6		Fishdom
7		Woodturning
8		Tangle Master 3D
9		Gardenscapes
10		Tiles Hop

Mid-core

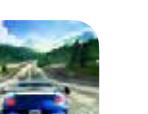
1		Call of Duty: Mobile
2		Sniper 3D
3		Fortnite
4		PUBG Mobile
5		State of Survival
6		RAID
7		Evony
8		Garena Free Fire
9		Clash of Clans
10		Clash Royale

Sports & Racing

1		8 Ball Pool
2		Mario Kart Tour
3		Madden NFL 21
4		Asphalt 9
5		CSR Racing 2
6		Rebel Racing
7		NBA 2K
8		Fishing Clash
9		MLB Tap Sports
10		Need for Speed No Limits

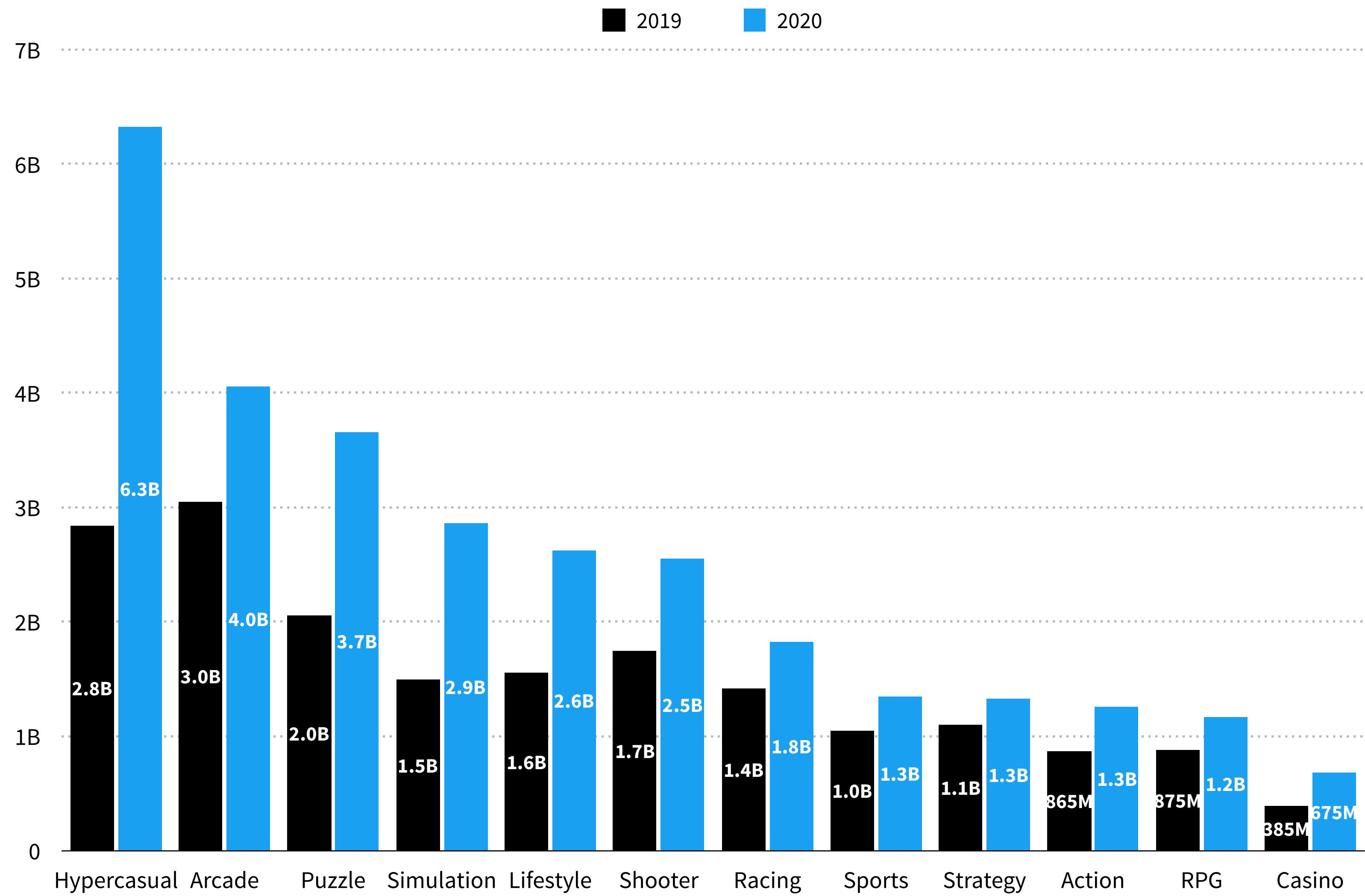
Top European Mobile Games in 2020 by Top-Level Category

Top mobile games in Europe by App Store and Google Play downloads

Casino			Casual			Mid-core			Sports & Racing		
1		Coin Master Moon Active	1		Among Us InnerSloth	1		Brawl Stars Supercell	1		Head Ball 2 Miniclip
2		Zynga Poker Zynga	2		Gardenscapes Playrix	2		PUBG Mobile Tencent	2		8 Ball Pool Miniclip
3		Plinko Master Shape Keeper	3		Brain Test Unico Studio	3		Sniper 3D Fun Games For Free	3		Traffic Rider Soner Kara
4		Poker Games CP Decision	4		Subway Surfers Sybo Games ApS	4		Call of Duty Activision Blizzard	4		Hill Climb Racing Fingersoft
5		Huuuge Casino Slots Huuuge Games	5		Roblox Roblox	5		State of Survival FunPlus	5		Mario Kart Tour Nintendo
6		Cash Frenzy SpinX Games	6		Brain Out Focus apps	6		Clash Royale Supercell	6		Dream League Soccer 2021 First Touch Games
7		Coin Dozer Game Circus	7		Woodturning voodoo	7		Garena Free Fire Garena Games Online	7		Street Racing 3D Ivy
8		Ra slots TINYSOFT	8		Tiles Hop Amanotes	8		Clash of Clans Supercell	8		Fishing Clash Ten Square Games
9		World Series of Poker Playtika	9		Fishdom Playrix	9		Mobile Legends Moonton	9		Traffic Racer Soner Kara
10		Slotomania PlayStudios	10		Homescapes Playrix	10		Mafia City Yotta Games	10		Tennis Clash Fun Games For Free

Hypercasual Surpassed Arcade as the Top Growing Genre

Global downloads for the top 100 mobile games by genre for 2019 and 2020

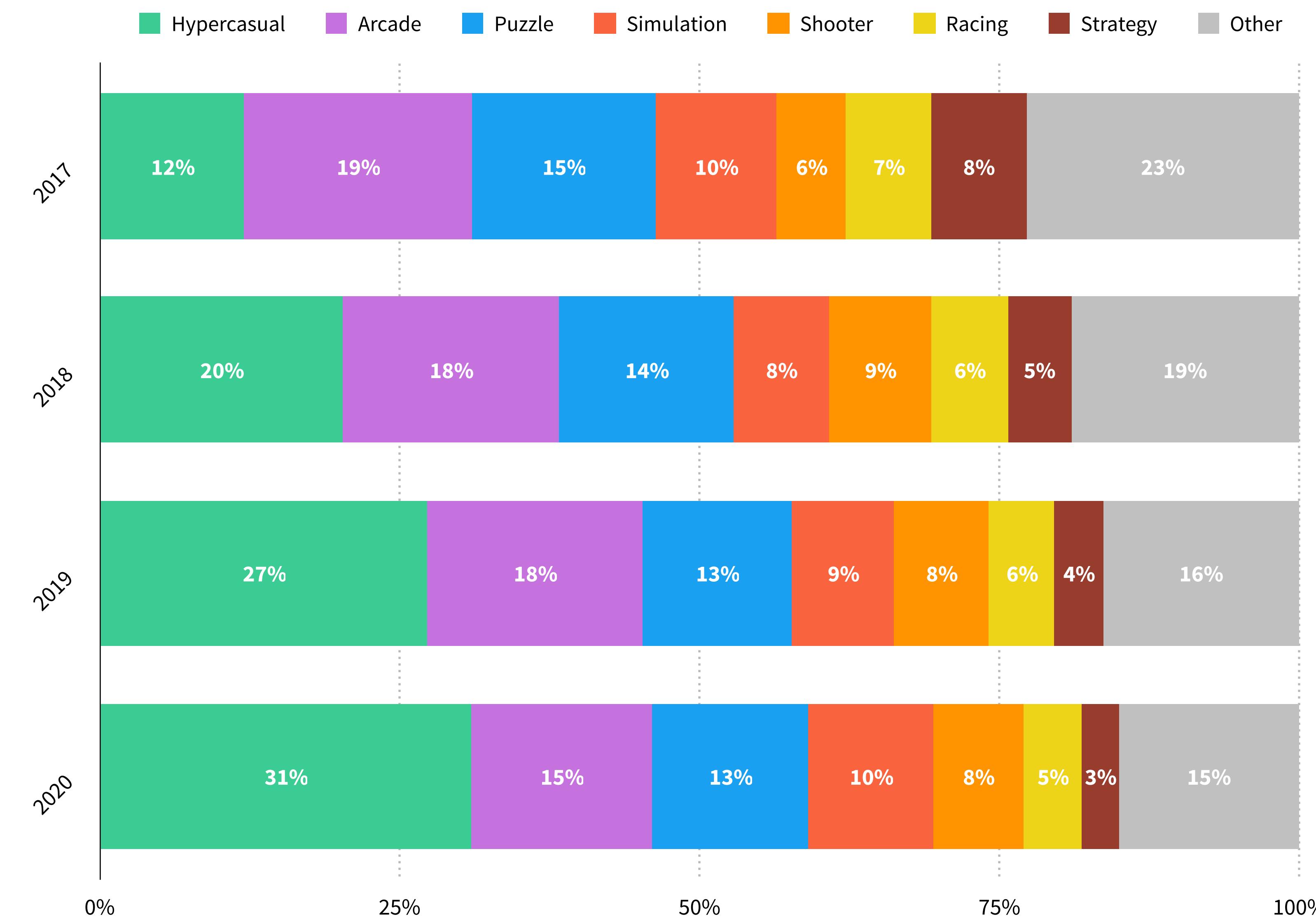


Hypercasual games were the biggest beneficiaries amid the overall lift in mobile gaming adoption in 2020. Top Hypercasual games accumulated 6.3 billion in downloads during 2020, observing a 123 percent surge year-over-year. Hypercasual surpassed Arcade as the No. 1 game genre by installs in 2020.

Simulation is another genre to keep an eye on, as its top 100 games saw 92 percent Y/Y growth in 2020, reaching 2.9 billion in downloads. Simulation was the fourth most downloaded genre in 2020.

COVID-19 Accelerated Adoption for Hypercasual Games

Proportion of downloads by genre among the top 1,000 games for each year

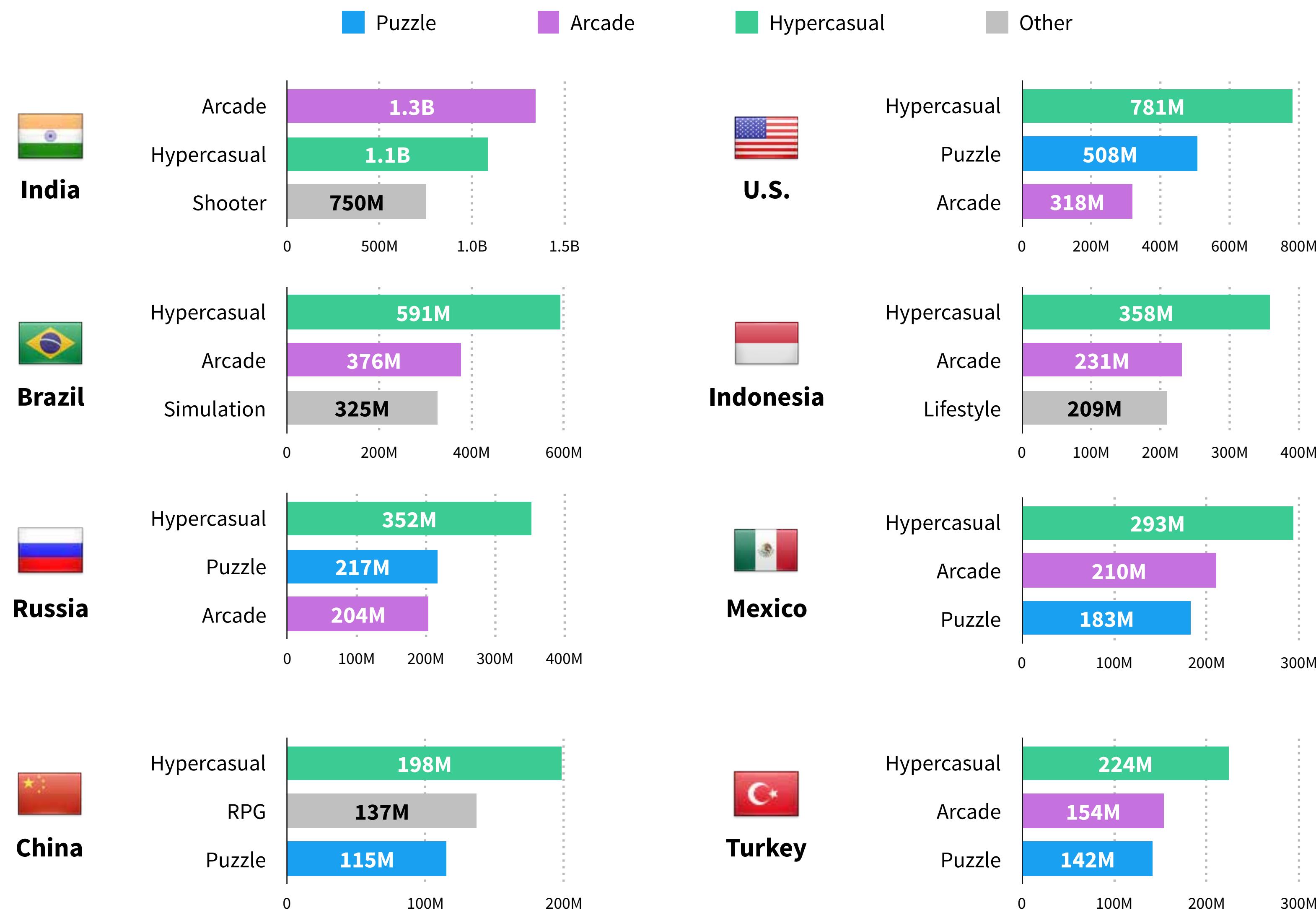


The consistent growth of Hypercasual games over the past four years is hard to overlook as their market share skyrocketed. By 2020, Hypercasual accounted for 31 percent of downloads among the top 1,000 games.

Though not as prominent as Hypercasual, Arcade and Puzzle games saw promising growth of 33 percent and 78 percent in 2020. Subway Surfers was the top game for Arcade and Among Us led the genre growth for Puzzle in 2020.

Hypercasual and Arcade Topped Global Markets

Top game genres by country in 2020

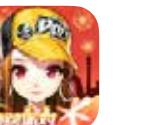
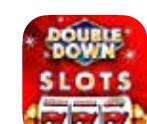
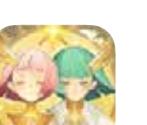
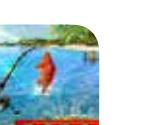
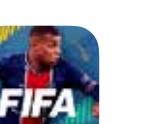
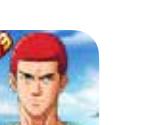


Hypercasual and Arcade appeared as the top game genres in 2020 across many of the largest markets. One of the emerging countries for gaming, India, saw highest adoption in Arcade and Hypercasual games, accounting for 1.3 billion and 1.1 billion, respectively.

Brazil was one of the top countries where strong growth in Simulation game adoption was seen in 2020. Simulation games were the third most downloaded game genre in Brazil, following Hypercasual and Arcade. Among these, Sandbox Simulations were especially popular in the Brazilian market.

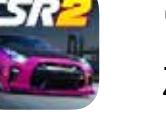
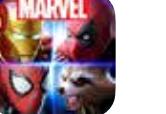
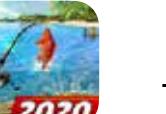
Top Grossing Mobile Games Worldwide by Top-Level Category

Top mobile games by global consumer spending on the App Store and Google Play

Casino			Casual			Mid-core			Sports & Racing		
1		Coin Master Moon Active	1		Pokémon Go Niantic	1		PUBG Mobile Tencent	1		Pro Spirits Baseball A Konami
2		Slotomania Playtika	2		Roblox Roblox	2		Honor of Kings Tencent	2		eFootball Konami
3		Bingo Blitz Playtika	3		Candy Crush Saga King	3		Monster Strike mixi	3		Golf Clash Warner Bros
4		Jackpot Party Scientific Games	4		Gardenscapes Playrix	4		Rise of Kingdoms Lilith Games	4		QQ Speed Tencent
5		DoubleDown™ DoubleUCasino	5		Homescapes Playrix	5		Fate/Grand Order Sony Corporation	5		Power Pros Konami
6		Cashman Casino Aristocrat Technology	6		Dragon Quest Walk SQUARE ENIX	6		Three Kingdoms Strategic Alibaba	6		KartRider Rush+ NEXON Company
7		Cash Frenzy SpinX Games	7		Toon Blast Zynga	7		Lineage M NCSOFT	7		8 Ball Pool Miniclip
8		Huuuge Casino Slots Huuuge Games	8		Fishdom Playrix	8		AFK Arena Lilith Games	8		Fishing Clash Ten Square Games
9		Lightning Link Octro	9		Candy Crush Soda Saga King	9		Garena Free Fire Garena Games Online	9		FIFA Soccer Electronic Arts
10		House of Fun Playtika	10		Township Playrix	10		Lineage2M NCSOFT	10		Slam Dunk DeNA

Top Grossing U.S. Mobile Games by Top-Level Category

Top mobile games by U.S. consumer spending on the App Store and Google Play

Casino			Casual			Mid-core			Sports & Racing		
1		Coin Master Moon Active	1		Roblox Roblox	1		Clash of Clans Supercell	1		Golf Clash Warner Bros
2		Slotomania Playtika	2		Candy Crush Saga King	2		PUBG Mobile Tencent	2		CSR Racing 2 Zynga
3		Bingo Blitz Playtika	3		Pokémon Go Niantic	3		Call of Duty Activision Blizzard	3		MLB Tap Sports Baseball Glu Games
4		Jackpot Party Scientific Games	4		Gardenscapes Playrix	4		Marvel Strike Force Scopely	4		8 Ball Pool Miniclip
5		DoubleDown™ DoubleUCasino	5		Homescapes Playrix	5		Garena Free Fire Garena Games Online	5		Fishing Clash Ten Square Games
6		Cashman Casino Aristocrat Technology	6		Toon Blast Zynga	6		Rise of Kingdoms Lilith Games	6		Golf Rival ORCA STUDIOS
7		Cash Frenzy SpinX Games	7		Candy Crush Soda Saga King	7		Marvel CoC Netmarble Games Corp	7		Mario Kart Tour Nintendo
8		House of Fun Playtika	8		Fishdom Playrix	8		DBZ DOKKAN BATTLE BANDAI NAMCO	8		Madden NFL 21 Electronic Arts
9		Heart of Vegas Aristocrat Technology	9		Merge Dragons! Zynga	9		Fortnite Epic Games	9		MLB 9 Innings 21 GAMEVIL
10		World Series of Poker Playtika	10		Township Playrix	10		Star Trek Fleet Command Scopely	10		FIFA Soccer Electronic Arts

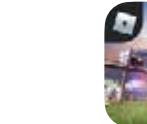
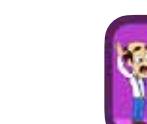
Top Grossing European Mobile Games by Top-Level Category

Top mobile games by European consumer spending on the App Store and Google Play

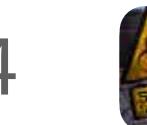
Casino

1		Coin Master
2		Slotomania
3		Huuuge Casino Slots
4		Zynga Poker
5		Slotpark
6		Bingo Blitz
7		Billionaire Casino
8		Poker Atrix
9		Cash Frenzy
10		Governor of Poker 3

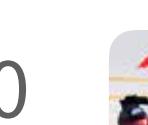
Casual

1		Gardenscapes
2		Pokémon Go
3		Roblox
4		Candy Crush Saga
5		Homescapes
6		Fishdom
7		Candy Crush Soda Saga
8		Township
9		Klondike Adventures
10		Toon Blast

Mid-core

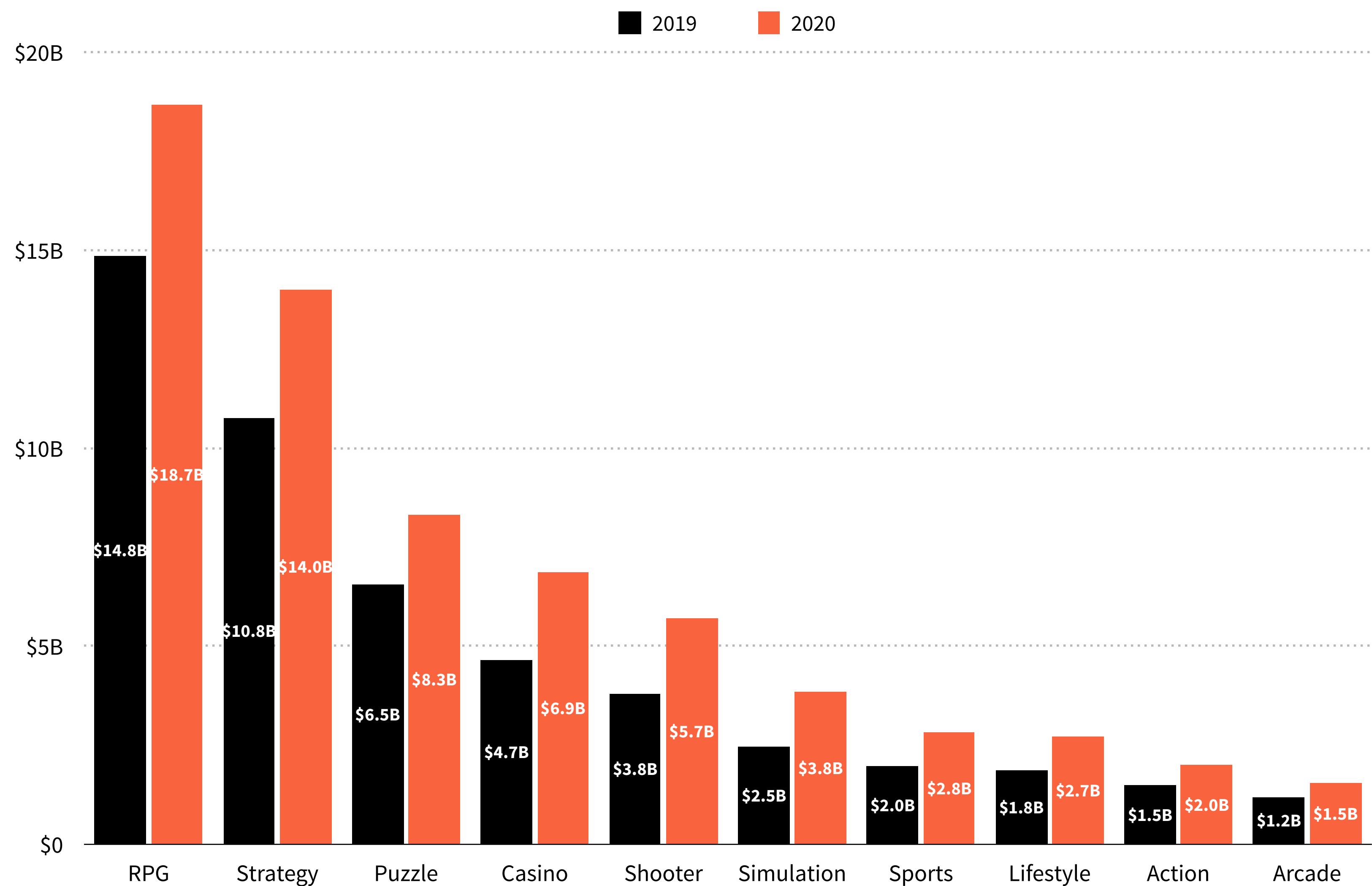
1		Brawl Stars
2		PUBG Mobile
3		Clash of Clans
4		State of Survival
5		Empires & Puzzles
6		Rise of Kingdoms
7		King of Avalon
8		Lords Mobile
9		Guns of Glory
10		Hero Wars

Sports & Racing

1		Fishing Clash
2		FIFA Soccer
3		8 Ball Pool
4		Top Eleven 2021
5		Golf Clash
6		CSR Racing 2
7		Mario Kart Tour
8		Tennis Clash
9		Top Drives
10		F1 Manager

RPG and Strategy Remained the Top Earning Genres

Global spending in the top 100 games by genre for 2019 and 2020

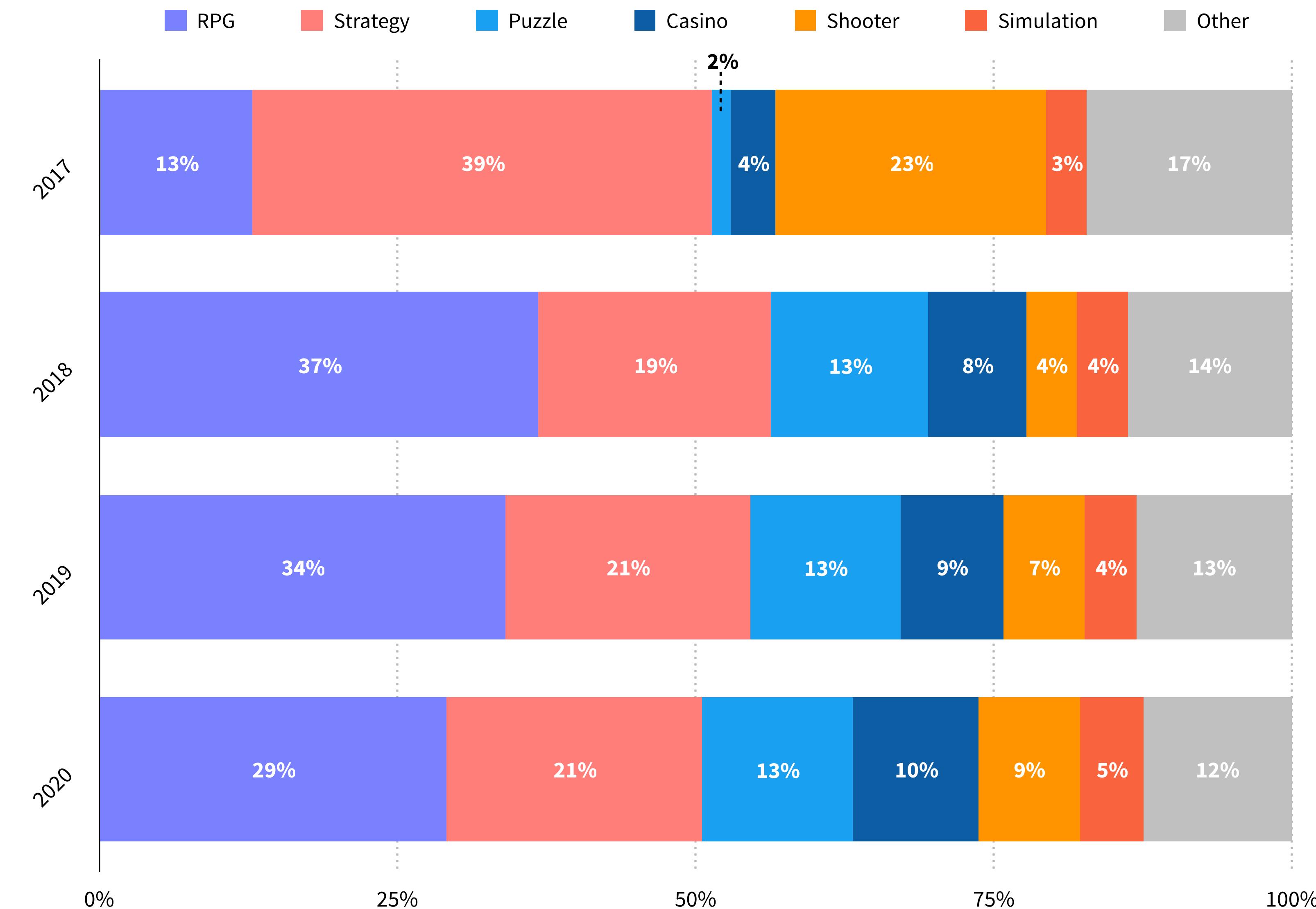


RPG saw the highest user spending in 2020, accumulating \$18.7 billion for the top 100 such games. RPG has been the top grossing genre for multiple years, with the majority of its in-app revenue coming from East Asian countries such as China, Japan, and South Korea. Also the top grossing genre in 2019, RPG still saw solid year-over-year growth in spending of 26 percent in 2020.

2020 was a major year for growth among Simulation games. In addition to the adoption surge, Simulation also saw the highest spending growth in 2020, achieving a 56 percent year-over-year increase.

RPG Accounted for 29 Percent of Global Spending

Proportion of revenue by genre among the top 1,000 grossing games each year

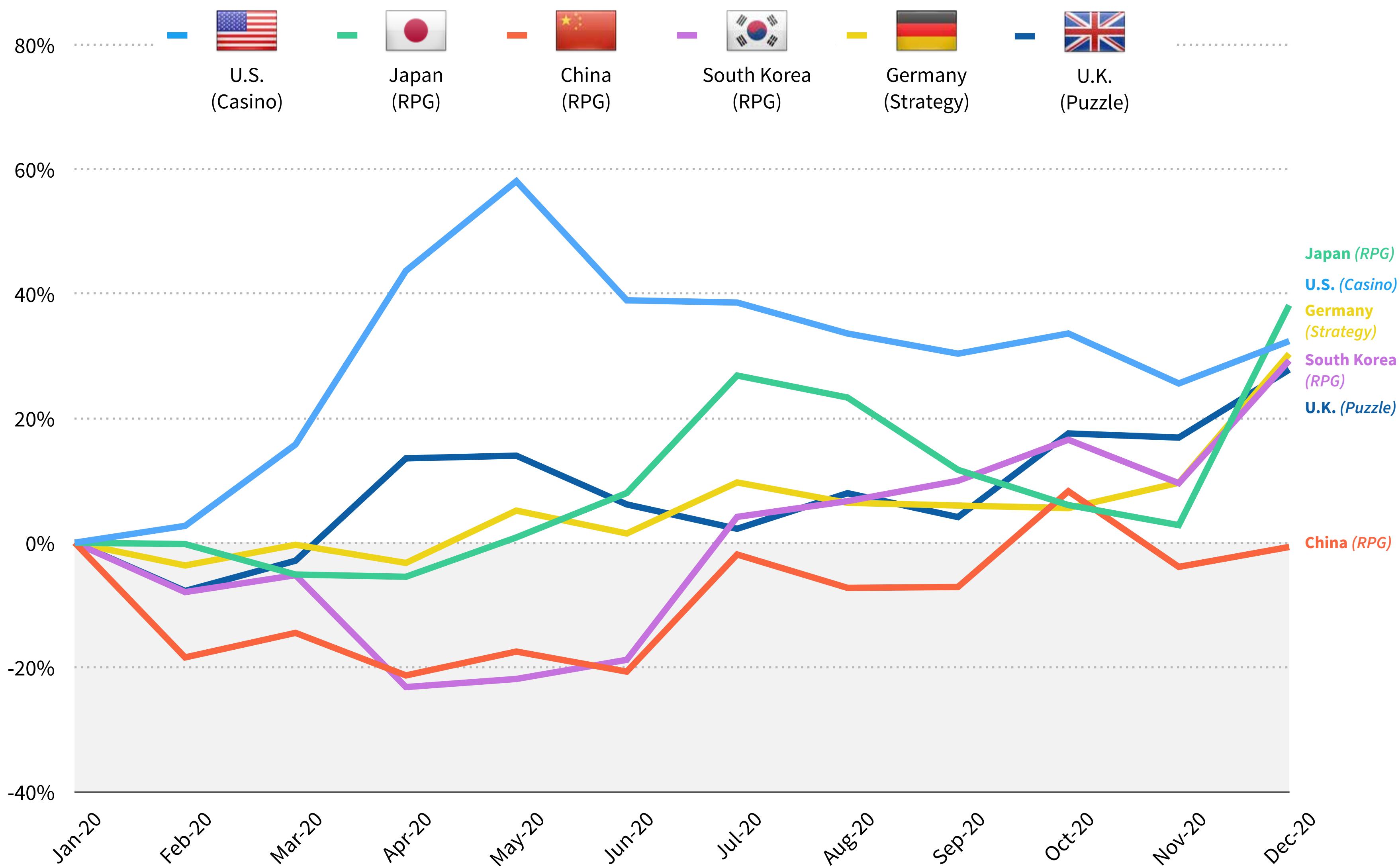


RPG and Strategy remained the top grossing genres by spending share in 2020, accounting for 50 percent of spending among the top genres. Newer titles were major drivers for revenue growth. Genshin Impact, released in September 2020, ranked No. 8 by spending among RPG genre games in 2020, earning \$560 million in net revenue.

Casino and Shooter games saw their share of spending grow, accounting for 10 percent and 9 percent, respectively, in 2020. Revenue growth was driven by older titles such as Coin Master and PUBG Mobile. However, Call of Duty: Mobile has also been performing exceptionally well in the Shooter genre after its launch in September 2019, surpassing \$760 million in player spending since release.

Casino Spending Spiked During Lockdowns

Spending growth of the top game genres in each country



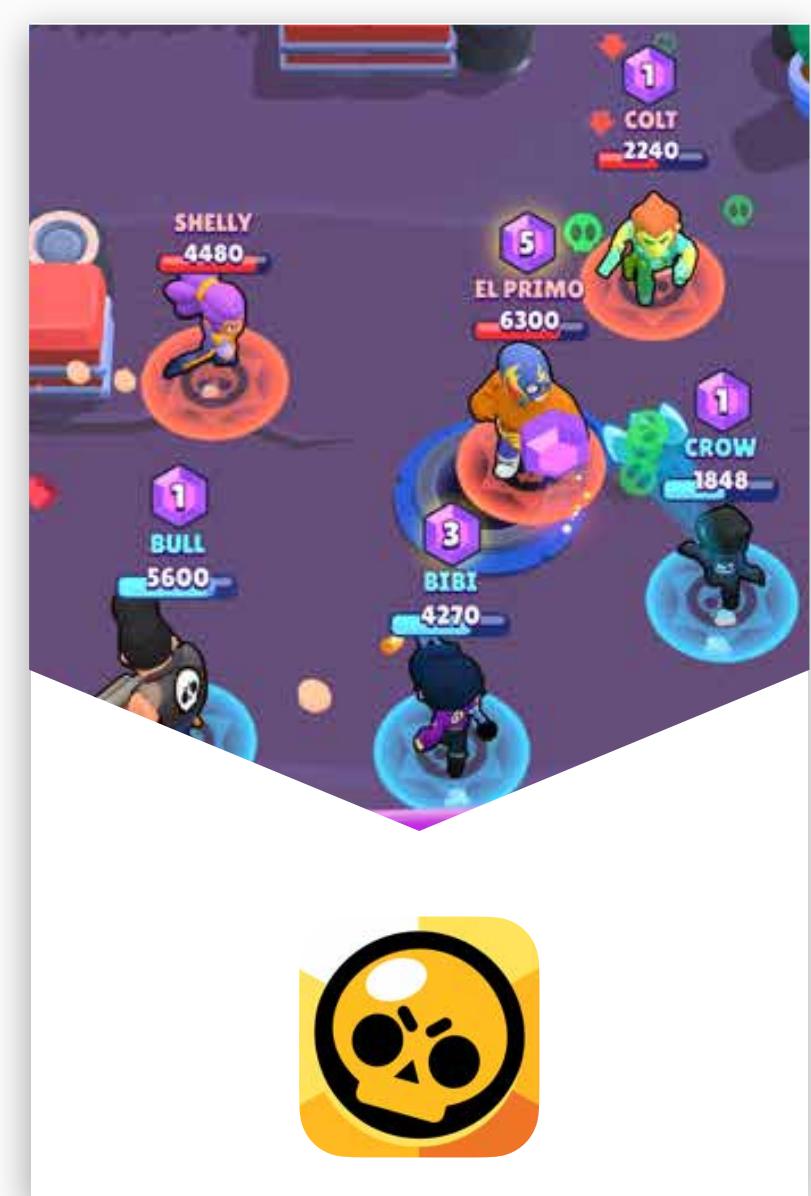
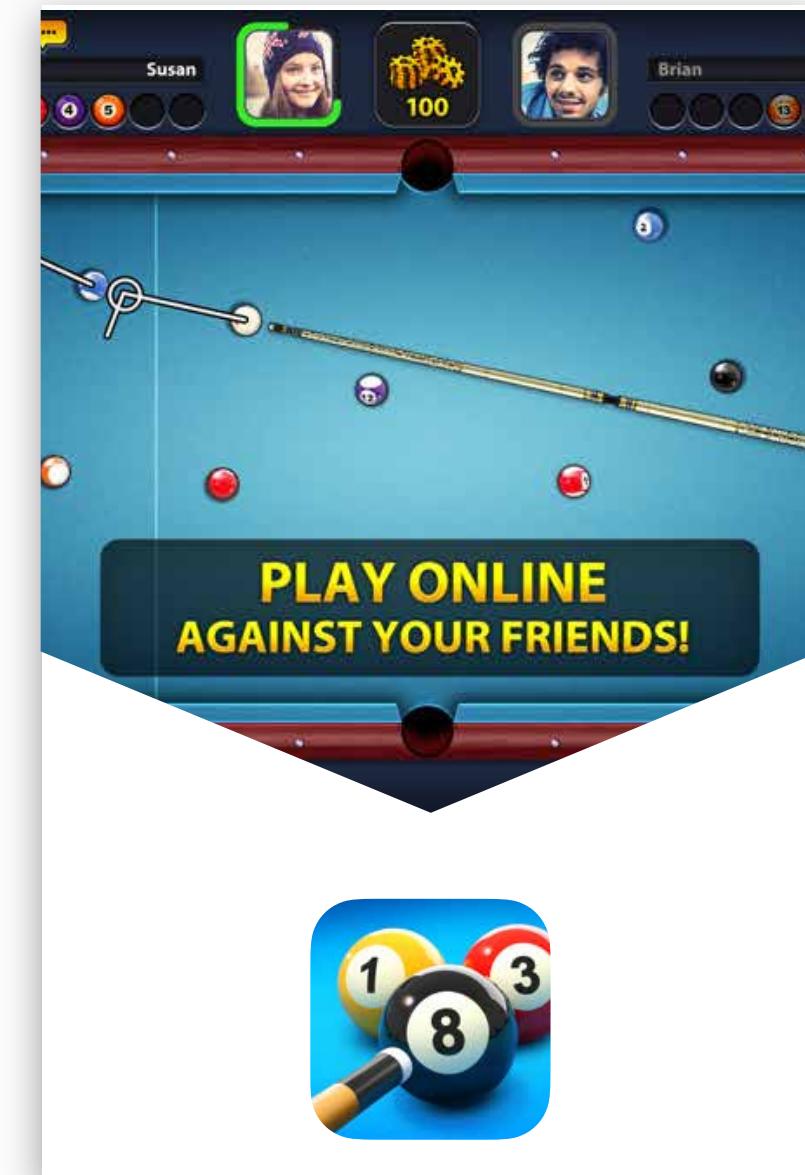
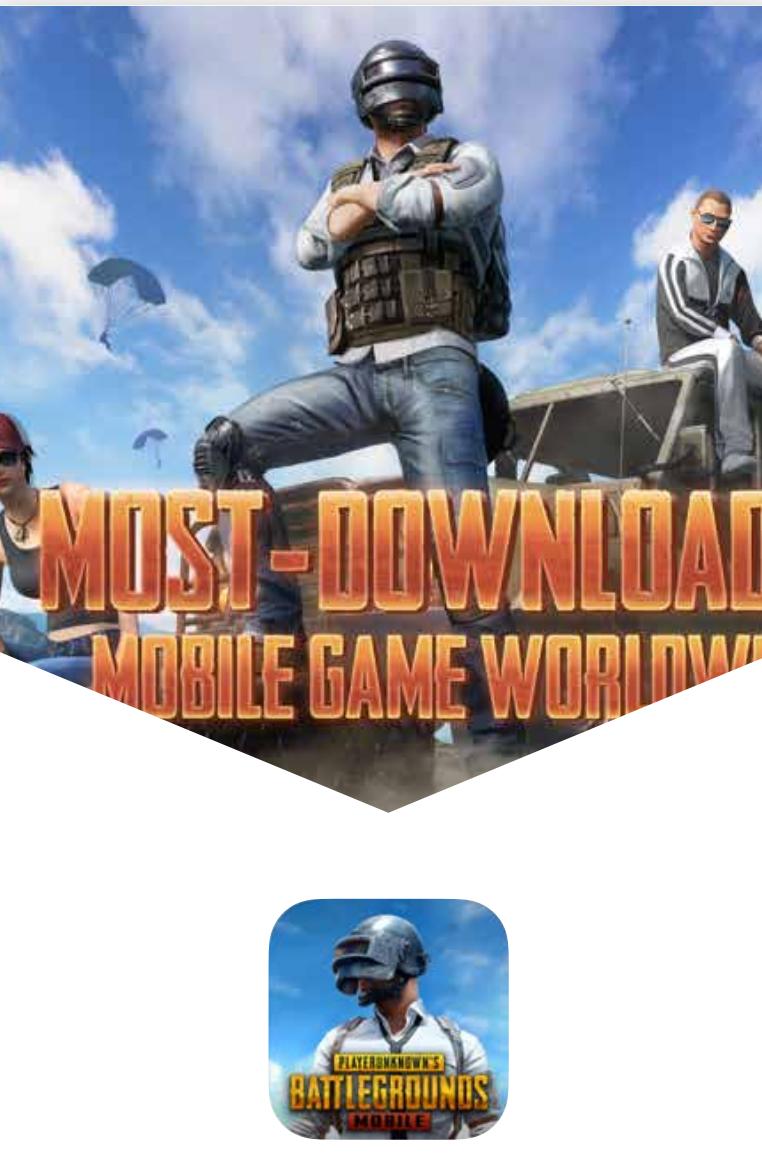
Casino was the top earning genre in the U.S. in 2020 and saw a spending spike in May 2020; much of the growth was guided by the top title, Coin Master, and slots games such as Cashman Casino. The spending surge correlated with a download spike among casino games in April 2020 amid COVID-19 lockdowns. The closure of physical casinos drove consumers to mobile games as an alternative.

RPG has been thriving in East Asian markets, and saw a spending spike in Japan and South Korea near the end of 2020. The new release Kingdom of the Winds, launched in July 2020, was among the top games that led RPG growth in South Korea. The game generated \$137 million in spending during the second half of 2020.

Key Takeaways:

Game Overview

1. Top hypercasual games surpassed 6 billion downloads in 2020, accounting for a 123 percent surge year-over-year. The overall lift seen by the genre was also reflected by an increase in market share, where 31 percent of game downloads were captured by Hypercasual games.
2. As an emerging genre, Simulation games are finding success in overseas markets such as Brazil where it was the third largest genre by downloads in 2020. Simulation's popularity has been trending up worldwide and saw a 92 percent growth surge year-over-year in 2020.
3. The RPG genre continue to thrive in Asia in terms of user spending. Japan and South Korea saw major spikes in RPG spending near the end of 2020, signaling another strong year for the genre in 2021. Among the top games, many new releases such as Genshin Impact and Kingdom of the Winds gained major recognition globally.



Game Intelligence

A close-up photograph of a person's hand holding a smartphone. The screen displays a vibrant, colorful mobile game, likely Candy Crush, featuring a grid of colored candies and various game icons at the top. The hand is positioned as if interacting with the game. The background is dark, making the bright screen stand out.

Art Style: 2D Cartoon Was the Most-Used Visual Treatment in 2020

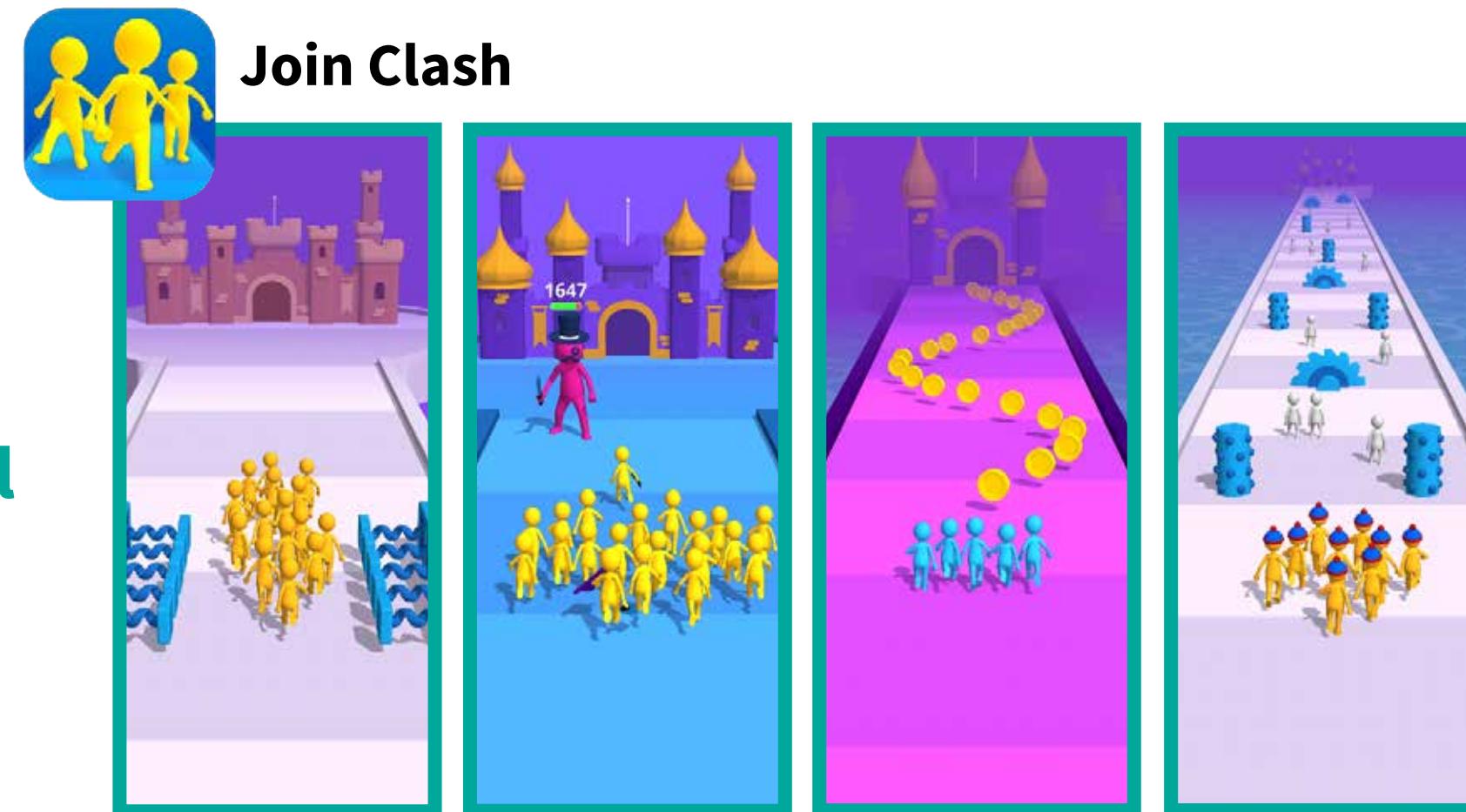
Top art styles among top games by downloads

Art Style represents the artistic aspect of mobile games, specifically the types of visuals used to convey the player experience. The art styles used by the most popular games by downloads in 2020 were 2D Cartoon, Hypercasual, 3D Realistic, and 3D Cartoon. With the unbridled success of Hypercasual genre games last year, the Hypercasual art style, with its minimalistic and clean visuals, also saw wide adoption.

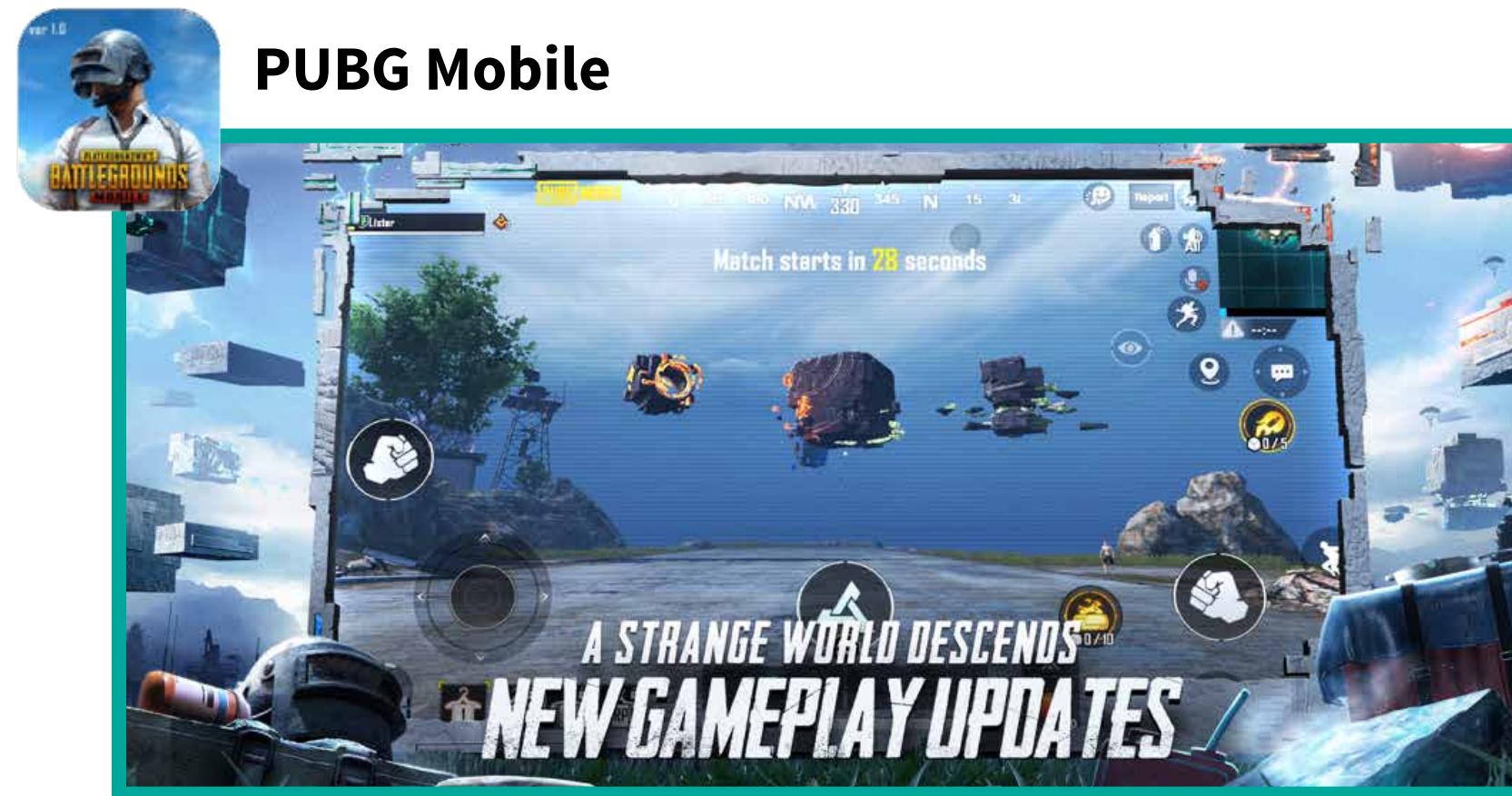
1 2D Cartoon



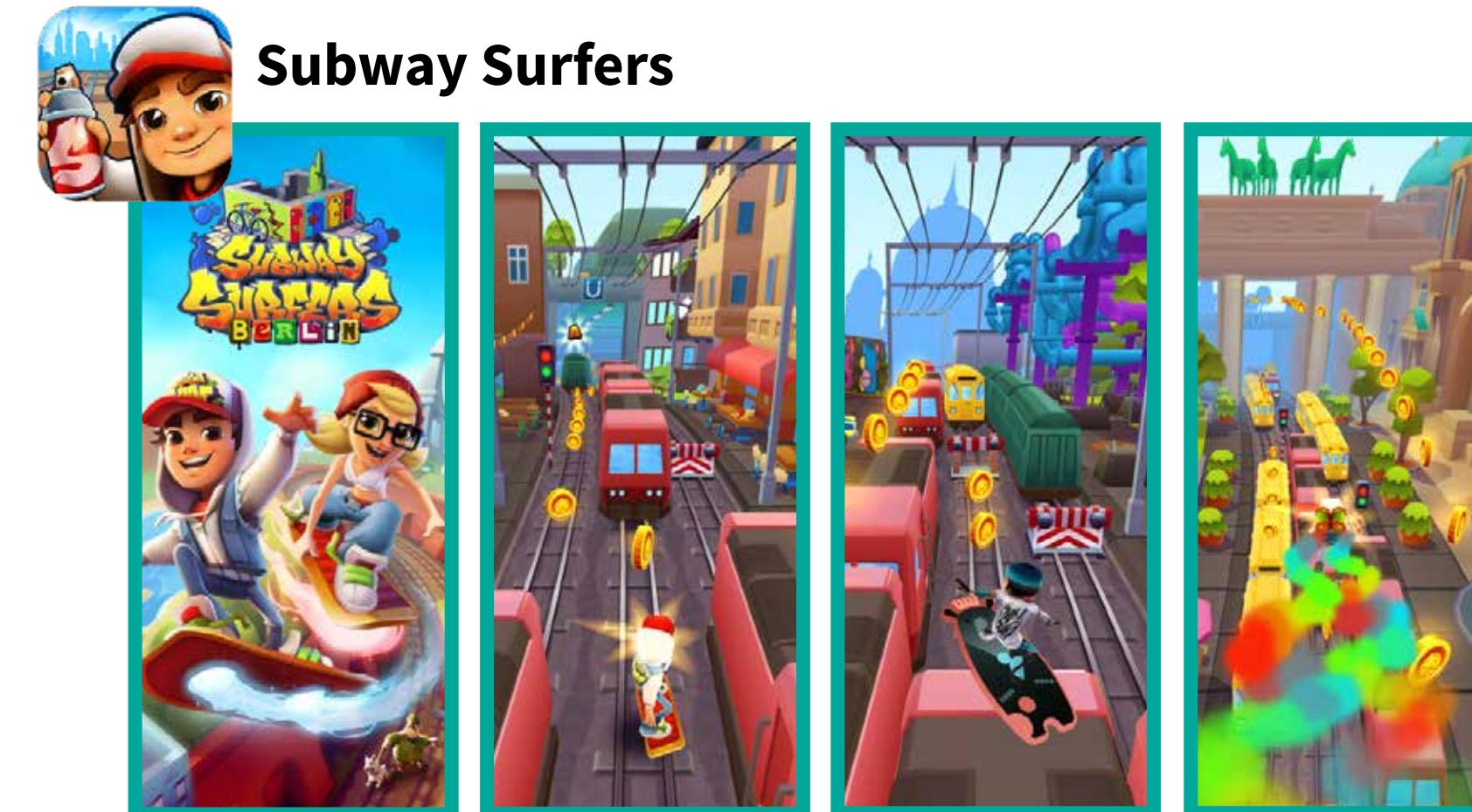
2 Hypercasual



3 3D Realistic

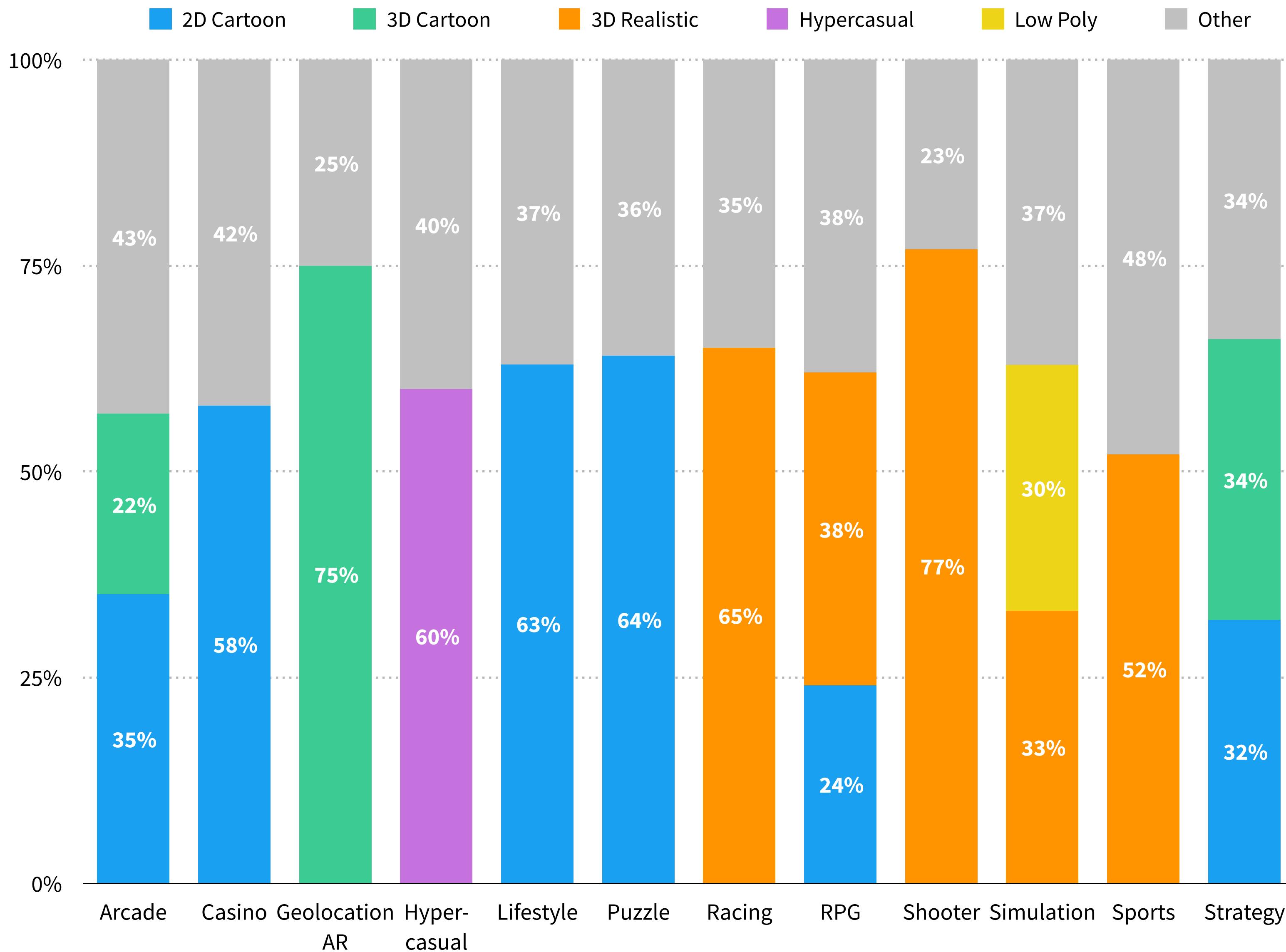


4 3D Cartoon



The 3D Realistic Style Dominated Mid-Core

Top art style by share of downloads among top games in 2020, by genre



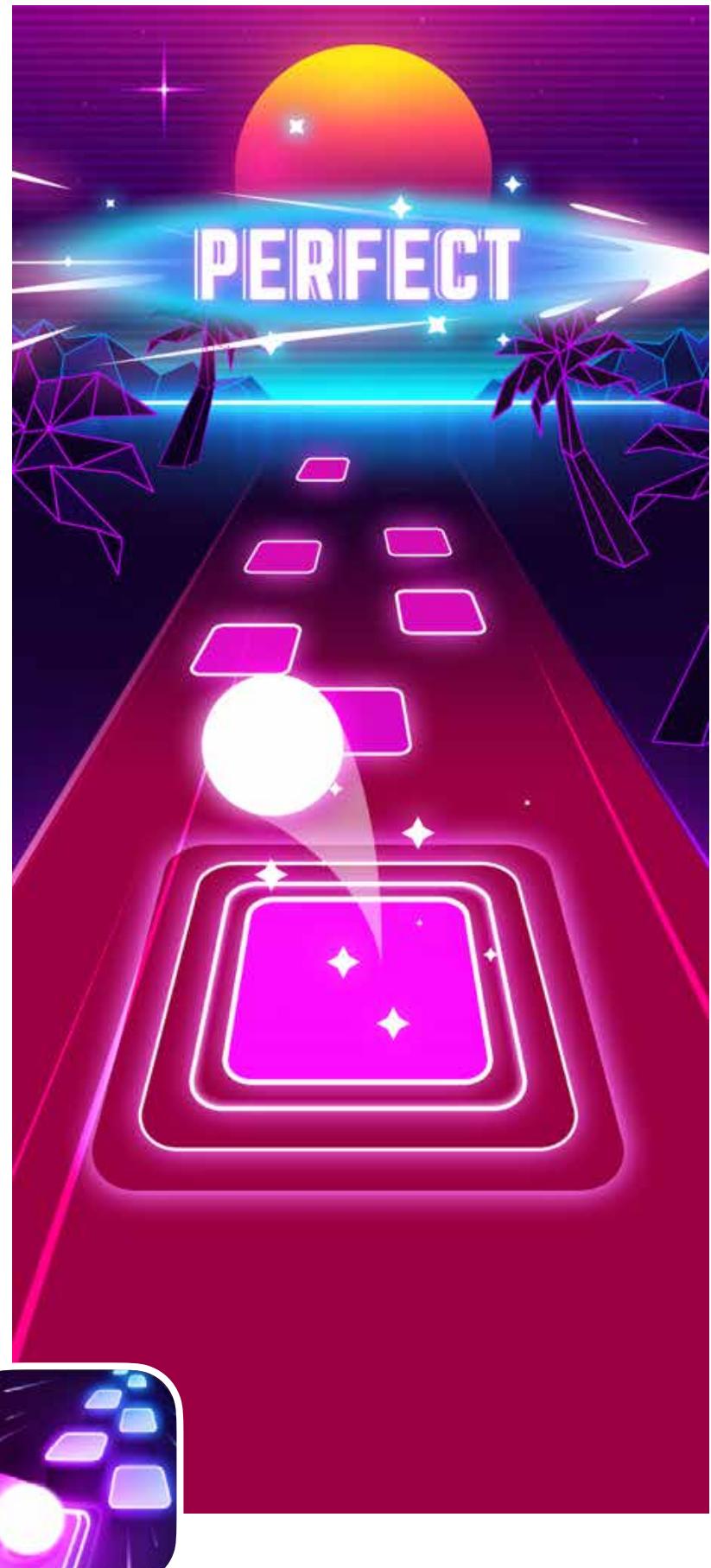
3D Realistic was the most popular art style within mid-core genres such as Racing, RPG, and Shooter. 3D Realistic games accounted for 77 percent of the downloads among top games in Shooter and 65 percent in Racing.

Casino, Lifestyle, and Puzzle saw large proportions of downloads coming from games that use a 2D Cartoon aesthetic, where this art style accounted for 58 percent, 63 percent, and 64 percent of the downloads, respectively.

Camera POV: Point-of-View Examples

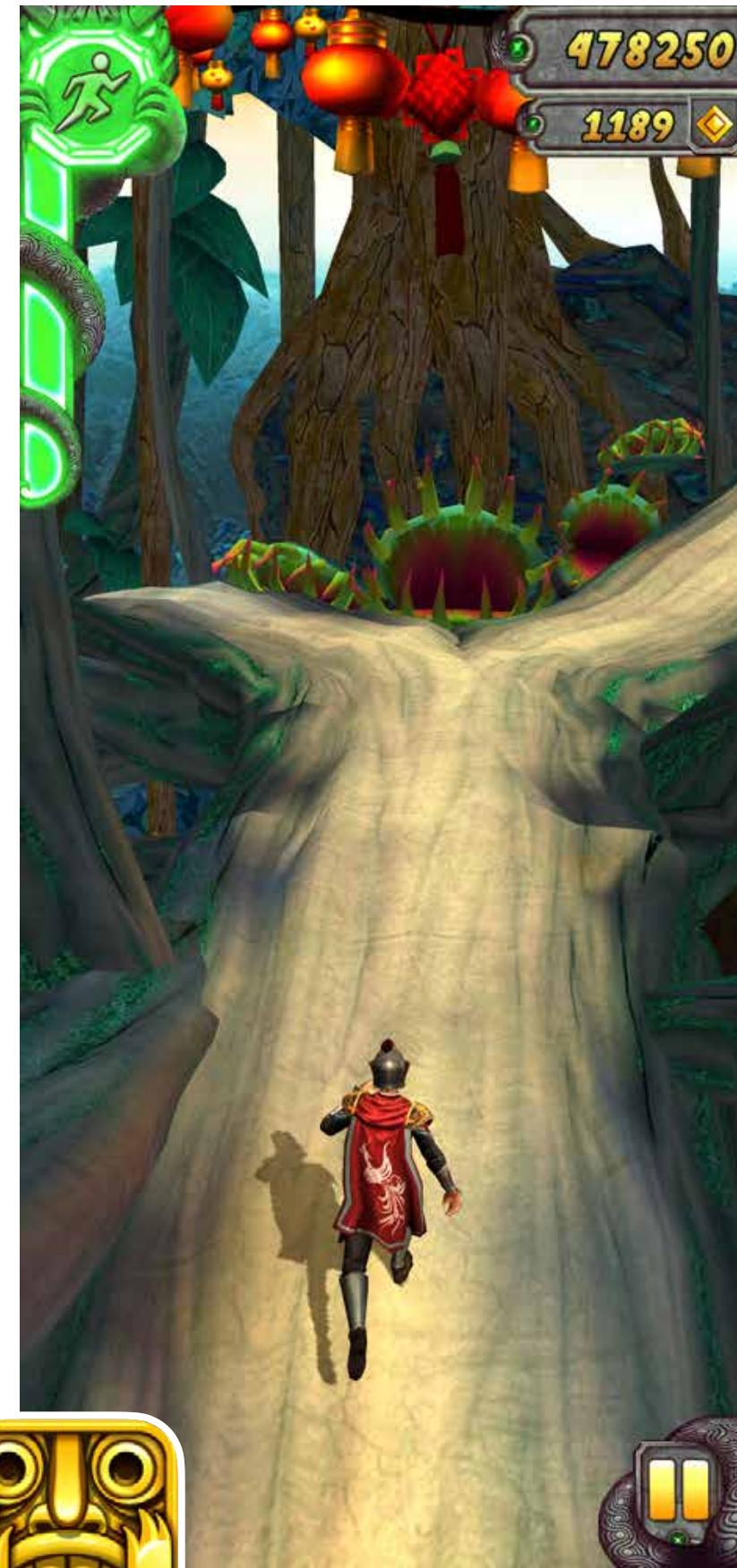
Screenshot examples of different camera Points of View (POVs) as defined in Game Intelligence

Isometric



Tiles Hop
Genre: Hypercasual

Third-Person



Temple Run 2
Genre: Arcade

First-Person



Sniper 3D
Genre: Shooter

Top-Down



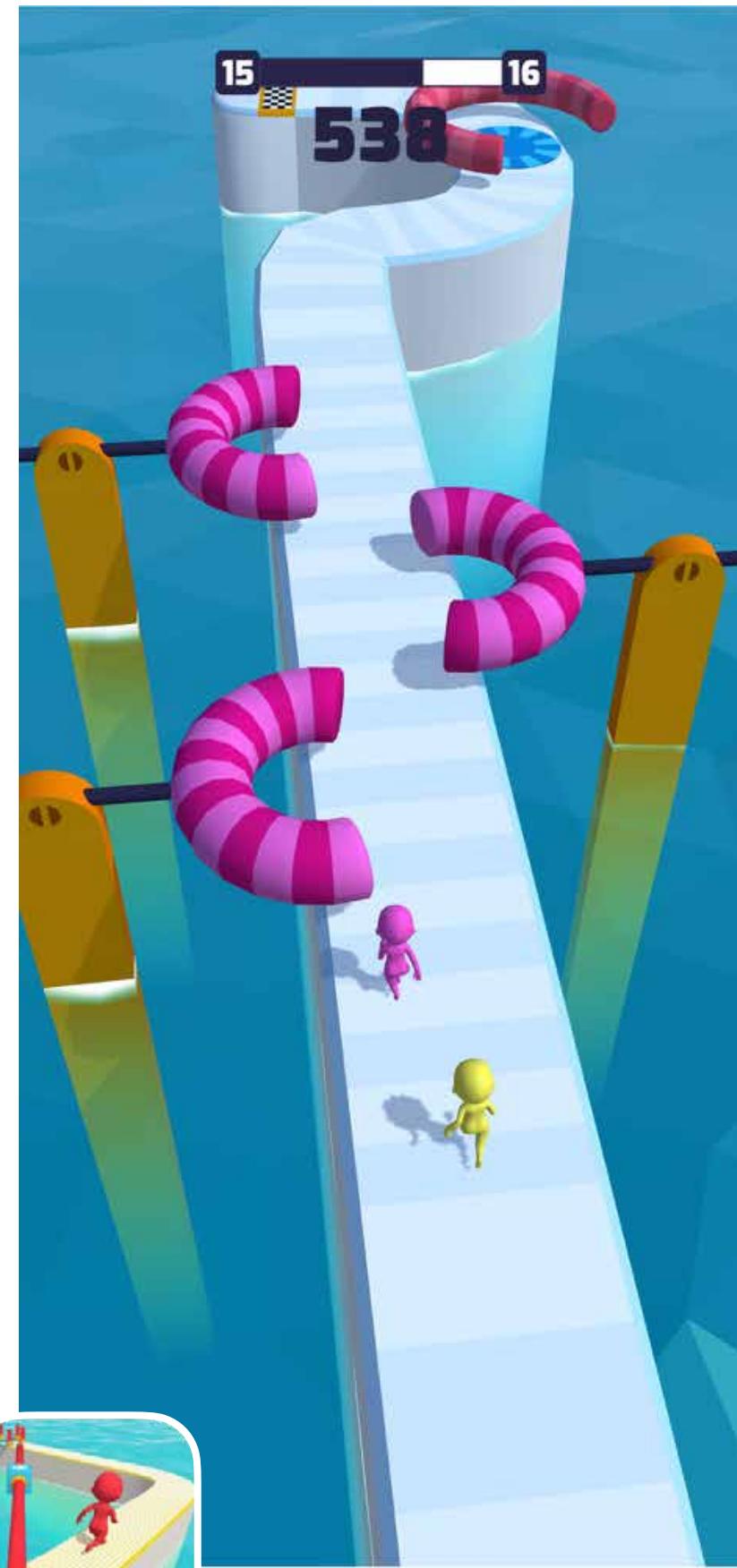
Hunter Assassin
Genre: Arcade

Side



My Talking Tom
Genre: Lifestyle

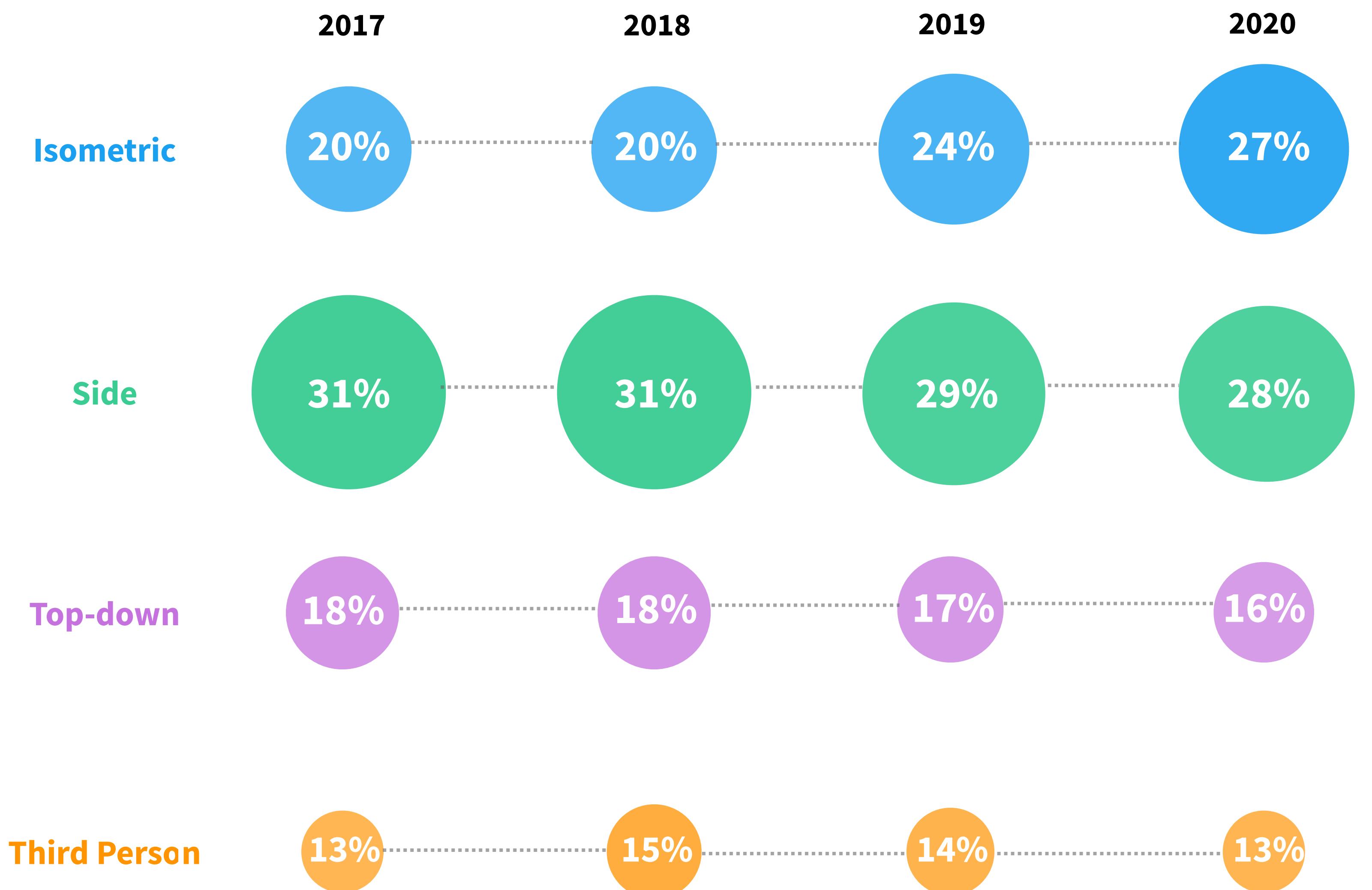
Dynamic



Fun Race 3D
Genre: Hypercasual

Isometric POV Is Trending in Popularity

Proportion of downloads of top games by camera POV

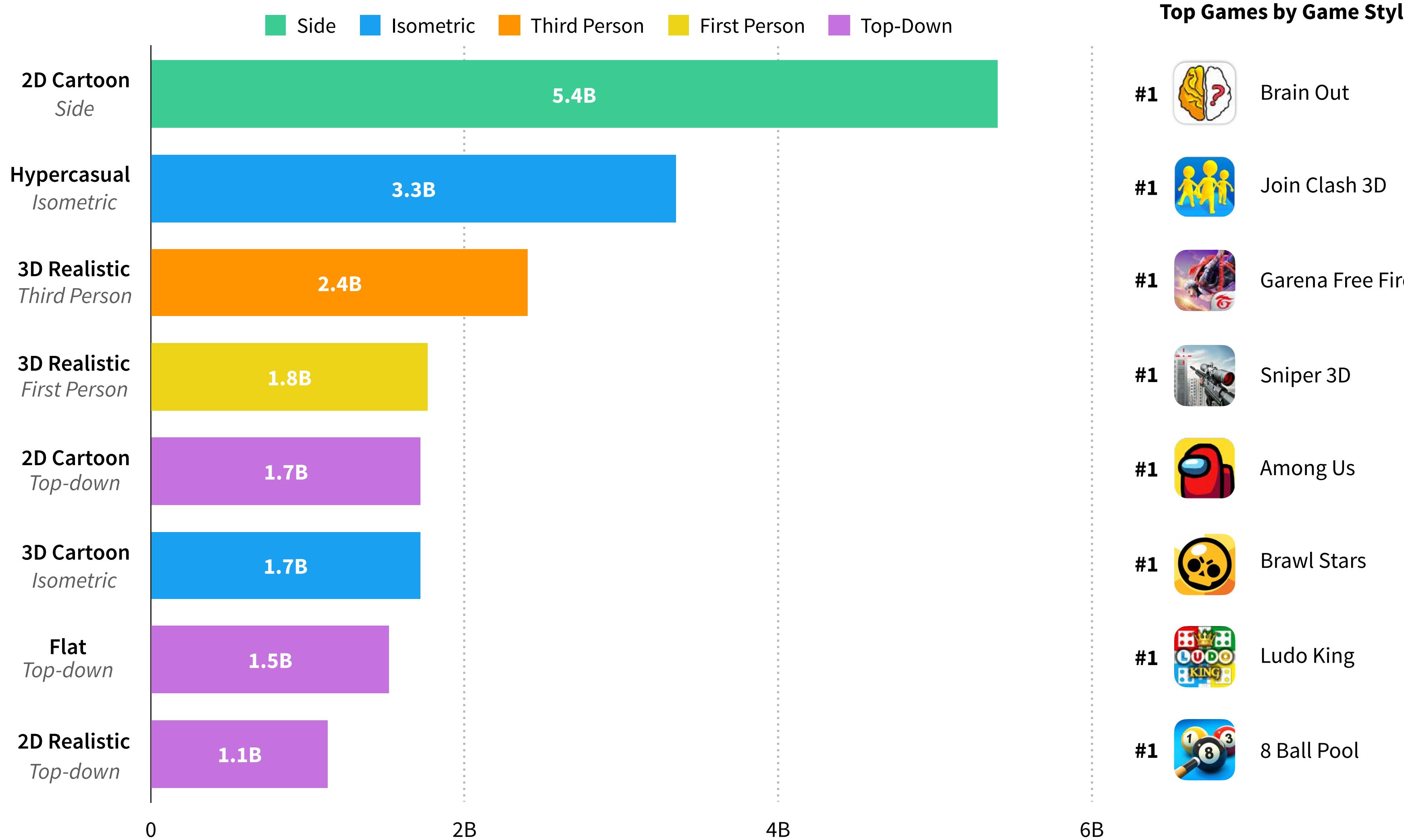


Isometric POV accounted for 27 percent of downloads among top games in 2020, a significant lift compared to the 24 percent in 2019. Isometric POV was especially popular among new releases, with 69 of the top 100 games released in 2020 adopting Isometric presentation. Most of these games fall under the Hypercasual and Arcade genres.

Despite top games moving away from Side POV, it still accounted for 28 percent of the downloads among top games in 2020. Top-Down and Third-Person both held a decent share of downloads among top games. However, they're most common among Arcade and Puzzle games.

2D Cartoon + Side POV Was the Most Popular Format

Top combinations of art style and camera POV among top 1,000 games by downloads in 2020



Games with the 2D Cartoon and side POV combination gameplay saw the most downloads in 2020, surpassing 5.4 billion installs which accounted for 17 percent of the downloads among top 1,000. Brain Out was the No. 1 game by downloads with this particular Art Style and Camera POV.

As previously mentioned, isometric is growing in popularity among new Hypercasual games. Games with this specific presentation accumulated 3.3 billion downloads in 2020, accounting for 11 percent of the total share.

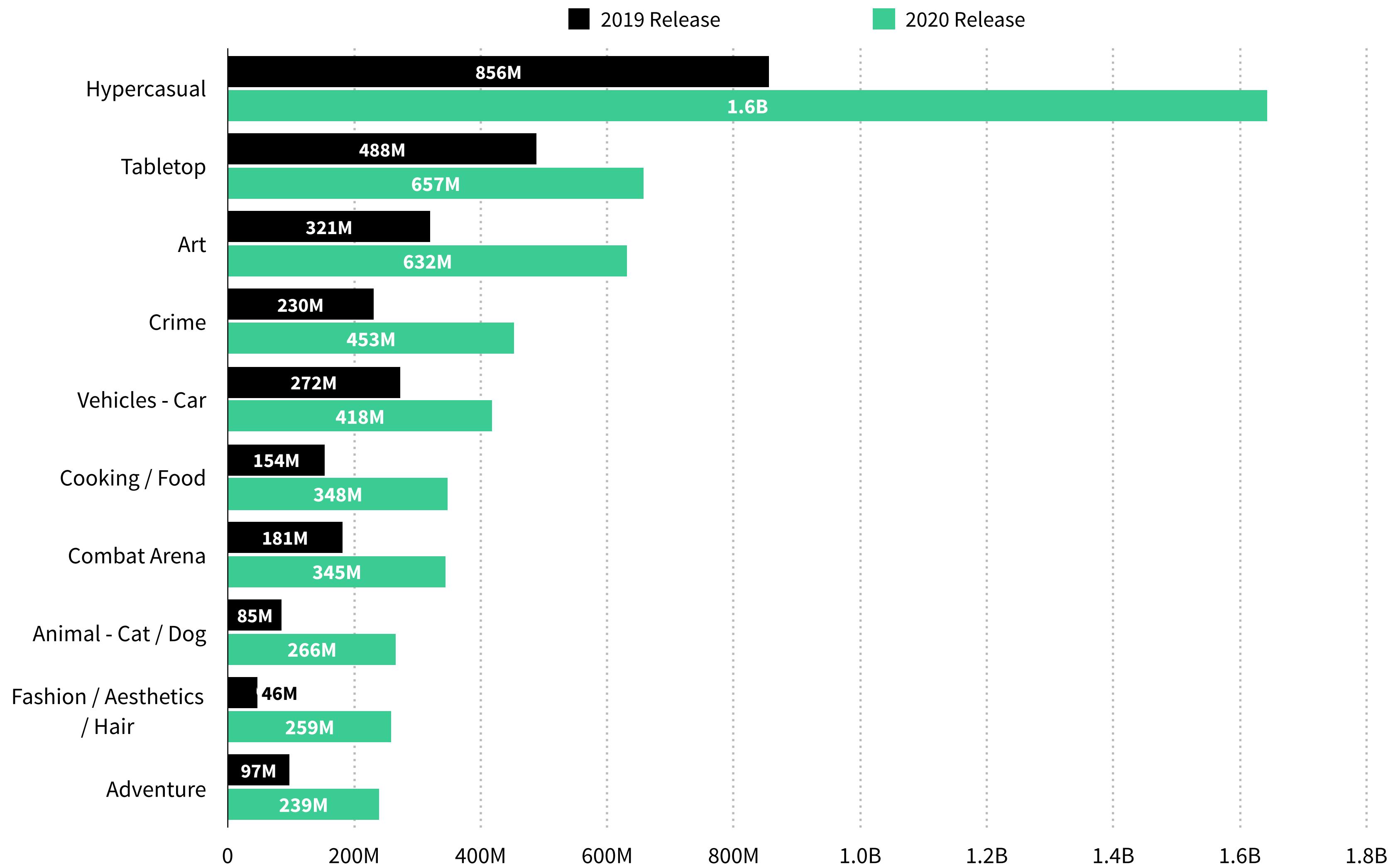
Themes: Hypercasual Ranked First, While Crime Saw Major Growth in Popularity

Top themes by market share of downloads among the top 1,000 games for each year

2017	2018	2019	2020
1 Vehicles - Car	1 Tabletop +1	1 Hypercasual +5	1 Hypercasual -
2 Tabletop	2 Combat Arena +2	2 Tabletop -1	2 Tabletop -
3 Adventure	3 Vehicles - Car -2	3 Vehicle - Car -	3 Vehicle - Car -
4 Combat Arena	4 Abstract +6	4 Combat Arena -2	4 Combat Arena -
5 Animal - Cat/Dog	5 Adventure -2	5 Abstract -1	5 Adventure +1
6 Animal - Wild	6 Hypercasual NEW	6 Adventure -1	6 Crime +4
7 Music	7 Animal - Cat/Dog -2	7 Music +2	7 Abstract -2
8 Sports - Soccer	8 Cooking / Food NEW	8 Art NEW	8 Animal - Cat / Dog +1
9 Zombie	9 Music -2	9 Animal - Cat / Dog -2	9 Art -1
10 Abstract	10 Animal - Wild -4	10 Crime NEW	10 Cooking / Food +1

Hypercasual and Art Outperformed Other Themes

Downloads in the year of release among new games by theme

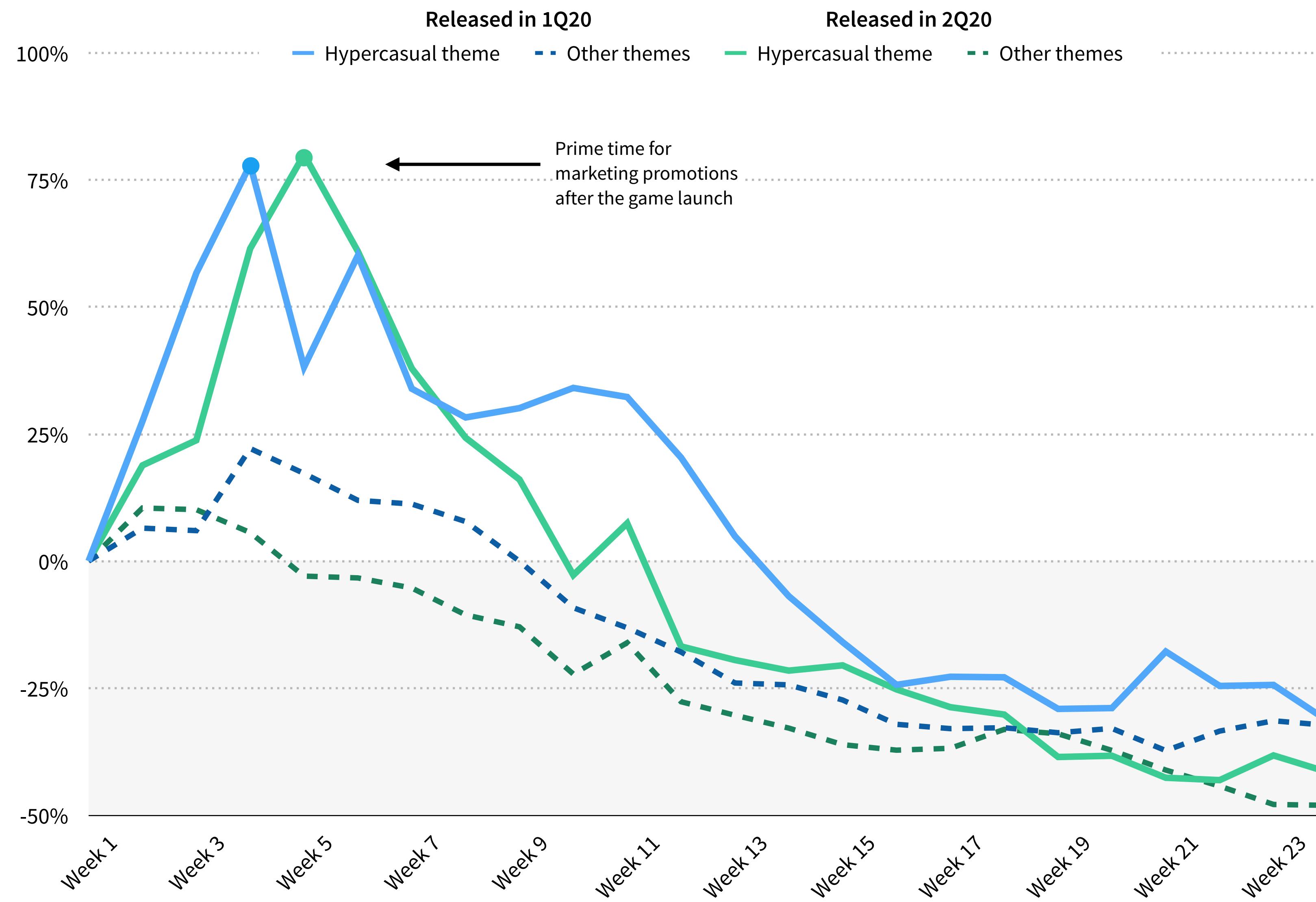


Hypercasual was the top growing theme among new releases in 2020, in line with the success of the Hypercasual genre. The top Hypercasual-themed game launched in 2020 accumulated 1.6 billion in downloads while 2019 releases with this theme surpassed 800 million in 2019. Join Clash 3D was a big hit among the new releases.

Art-themed games are also seeing signals for higher growth in 2021. The 2020 releases of Art games surpassed 632 million in downloads, 97 percent higher than the similar games released in 2019.

Hypercasual Hit Peak Growth in Early Weeks of Launch

Weekly growth trajectory of new games released in Q1 2020 vs .Q2 2020



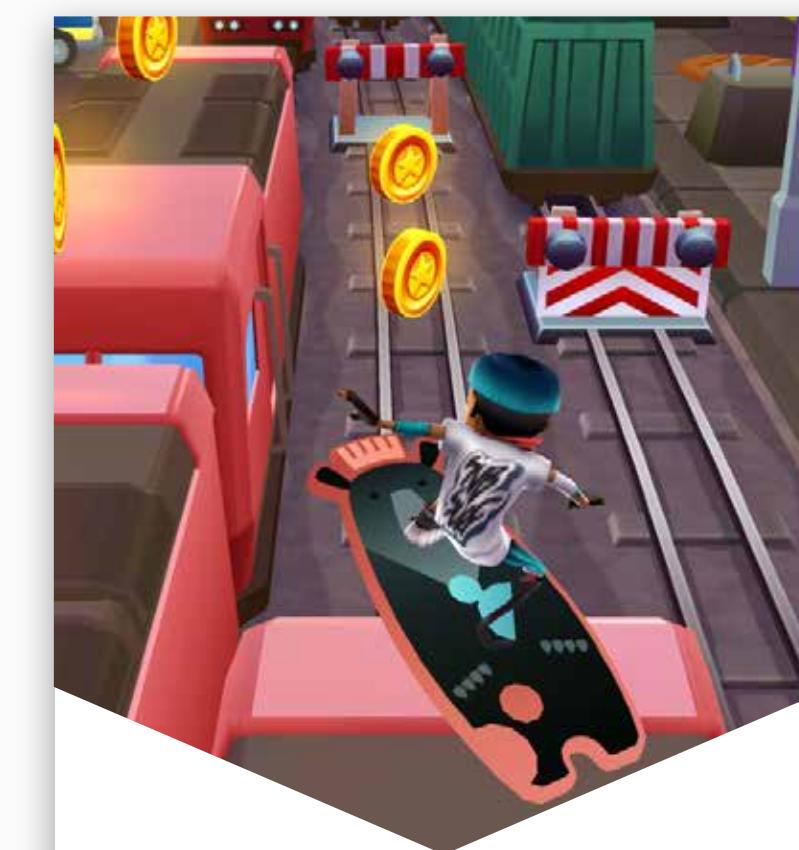
Hypercasual-themed games hit short-term peak growth around week 3-5 after launch, as these games released in the first half of 2020 reached a 75 percent growth rate (over the first week downloads) during the first five weeks. The outstanding growth of the Hypercasual theme is undoubtedly associated with the hype of the Hypercasual genre in 2020 overall.

Based on games launched in Q2 2020, the prime time for marketing efforts and promotions fell within the first nine weeks for Hypercasual-themed games and the first four weeks for other games, as the download growth remained positive after the initial launch.

Key Takeaways:

Game Intelligence

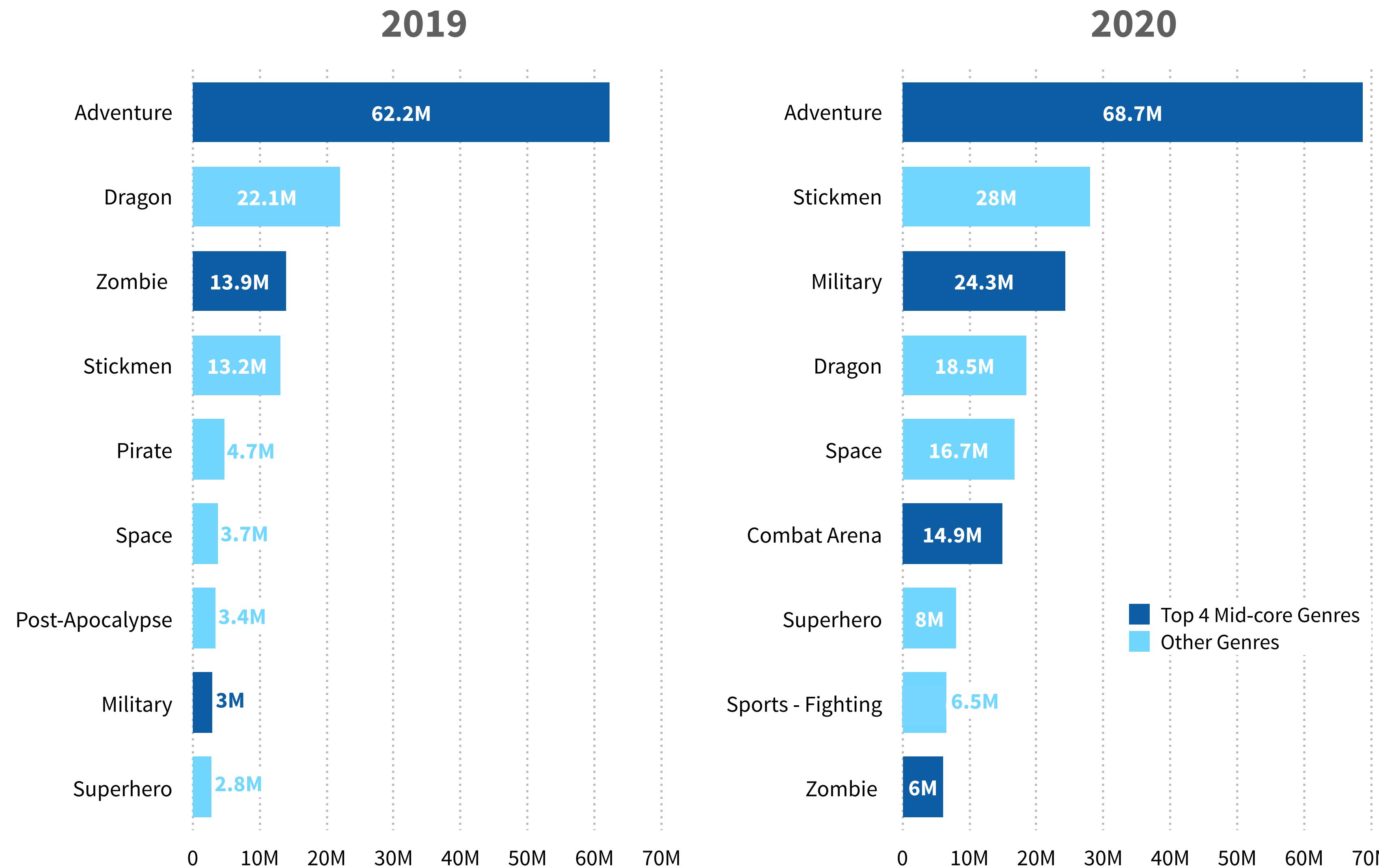
- 1. 2D Cartoon remained the most popular art style in mobile games, dominating genres such as Arcade, Casino, Lifestyle, and Puzzle.** In addition, the Hypercasual art style also gained more traction in 2020, accounting for 71 percent of game downloads in 2020.
- 2. Isometric POV is trending up among new game releases, accounting for 27 percent of the downloads among top games in 2020.** Side POV has been the top perspective in the past. Although it appears that new releases are moving away from this traditional POV type, it still accounted for 28 percent of the download share in 2020.
- 3. Hypercasual, Tabletop, and Vehicle - Car were the top themes by downloads for the second straight year.** Unsurprisingly, Hypercasual remained a top theme among new games in 2020. New Art-themed games also saw success in 2020 while accumulating 632 million downloads in the year, showcasing further growth potential in 2021.



Gameplay Trends

Mid-Core Themes Gaining Popularity Within Puzzle Genre

Worldwide downloads of puzzle games with popular mid-core game themes



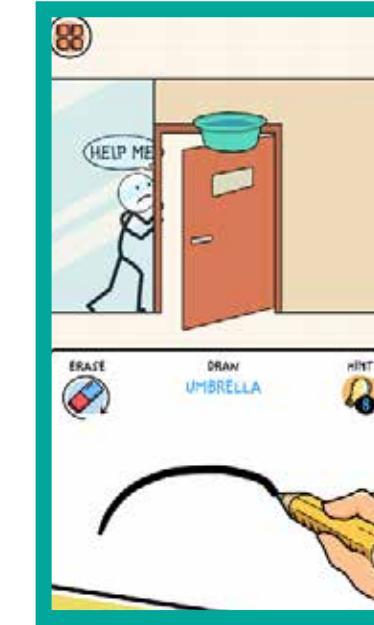
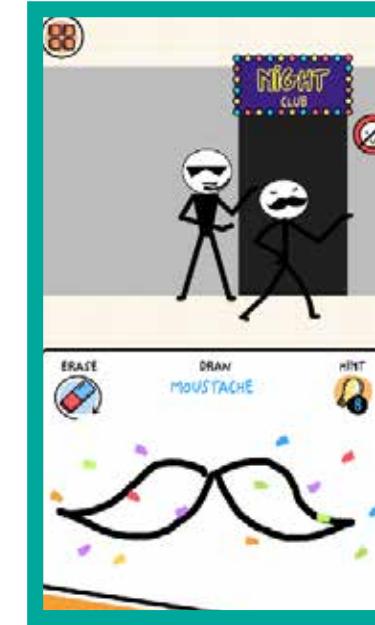
Stickmen games among Puzzle surpassed 28 million downloads in 2020, after seeing 113 percent growth year-over-year. The new release Draw Puzzle, launched in April 2020 amid the COVID-19 outbreak, was a major driver for the growth. The game has surpassed 9 million since launched.

Popular Mid-Core themes, such as Military, Combat Arena, Superhero, and Sports - Fighting, gained more recognition in 2020 as cross-genre themes started to see success with Puzzle. No One Escape from Lion Studios was one of the first combat-arena-themed games in Puzzle, surpassing 14 million downloads since its release.

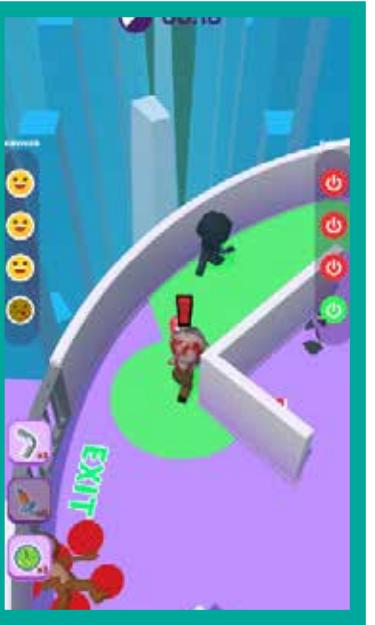
Puzzle Games Are Exploring New Themes

Popular emerging themes among new puzzle games

Stickmen



Combat Arena



Military



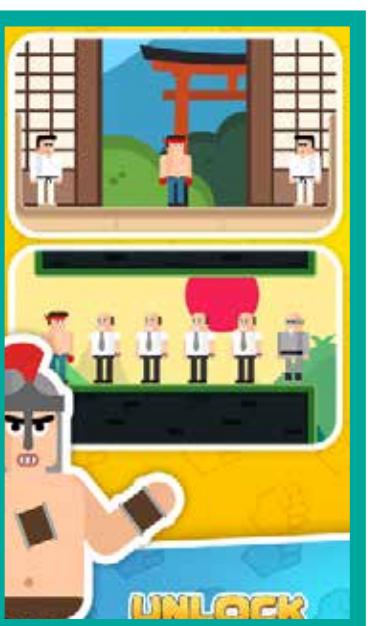
Superhero



Space



Sports - Fighting

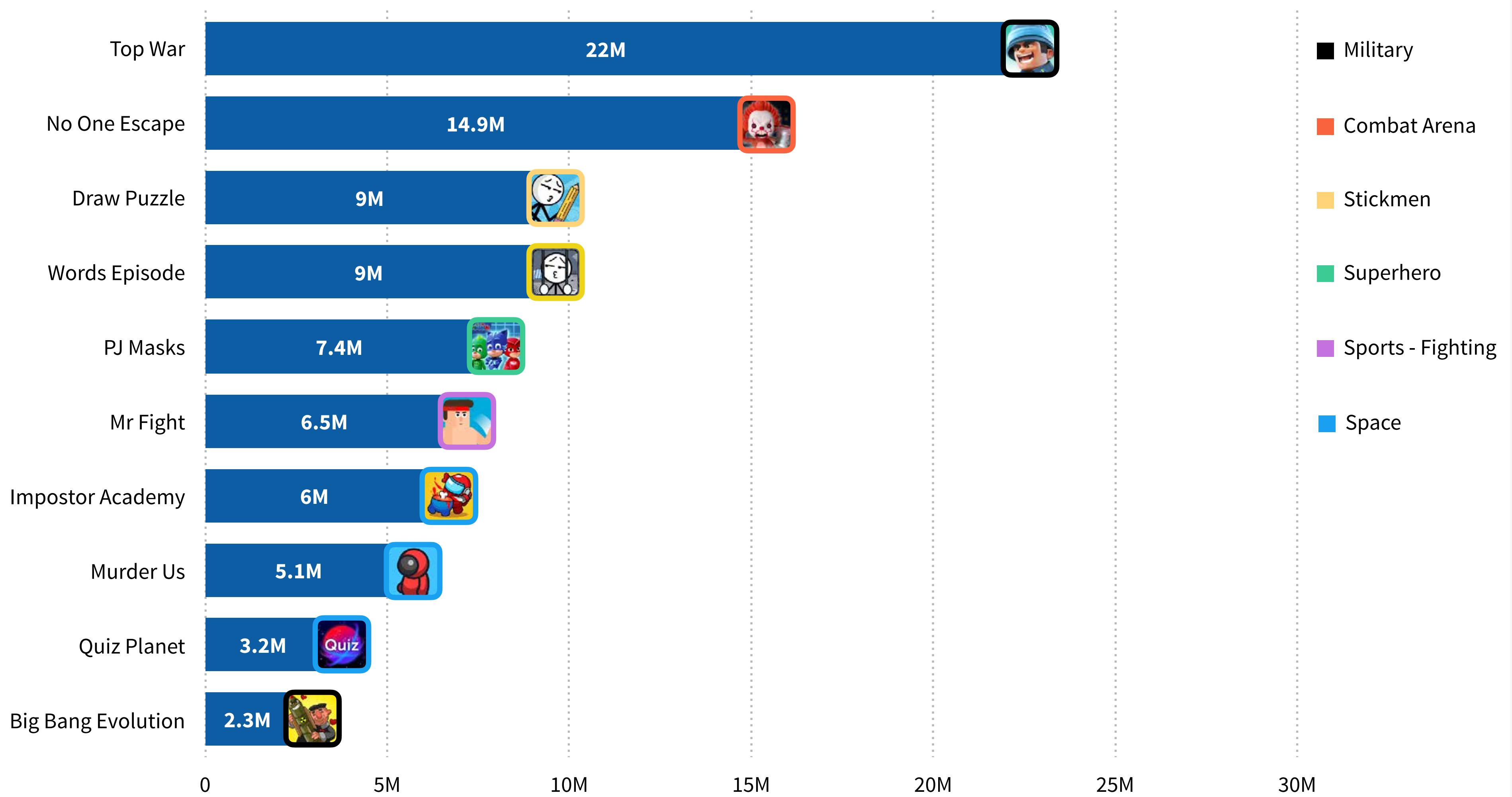


Stickmen, Military, Space, Combat Arena, Superhero, and Sports - Fighting were among the top emerging themes in Puzzle. Although Hypercasual and Tabletop themed Puzzle games continued to see strong growth, Puzzle games are expanding out of traditional themes and are exploring untapped territory.

Sports - Fighting saw its first puzzle game launch in October 2020, when Mr Fight made its appearance on the app stores. Mr Fight has surpassed 6 million downloads within three months of release.

Space Themed Puzzle Games Follow Among Us' Footsteps

Emerging themes among new titles (released in 2019-2020) that have seen success

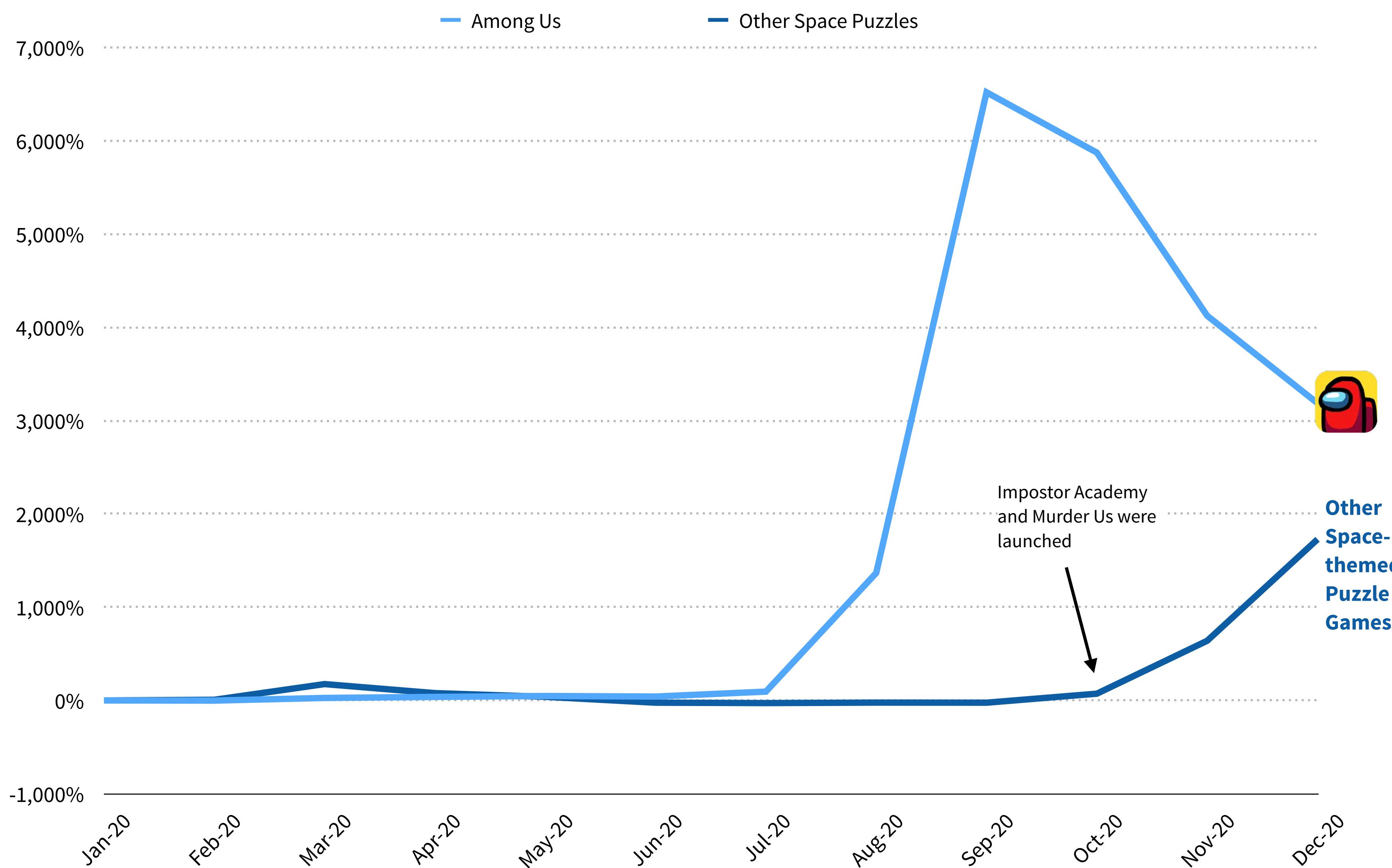


Top War surpassed 22 million downloads in 2020. Big Bang Evolution is another pioneer for the Military theme in Puzzle, accumulating 2.3 million downloads just on App Store. Big Bang Evolution saw 10 percent growth year-over-year for its second year.

Other Space-themed Puzzle games followed the success of Among Us. Imposter Academy and Murder Us were released in October 2020 and both surpassed 5 million downloads within three months of release.

The Ecosystem Around Among Us is Also Booming

Growth of Among Us vs. other Space-themed Puzzle games

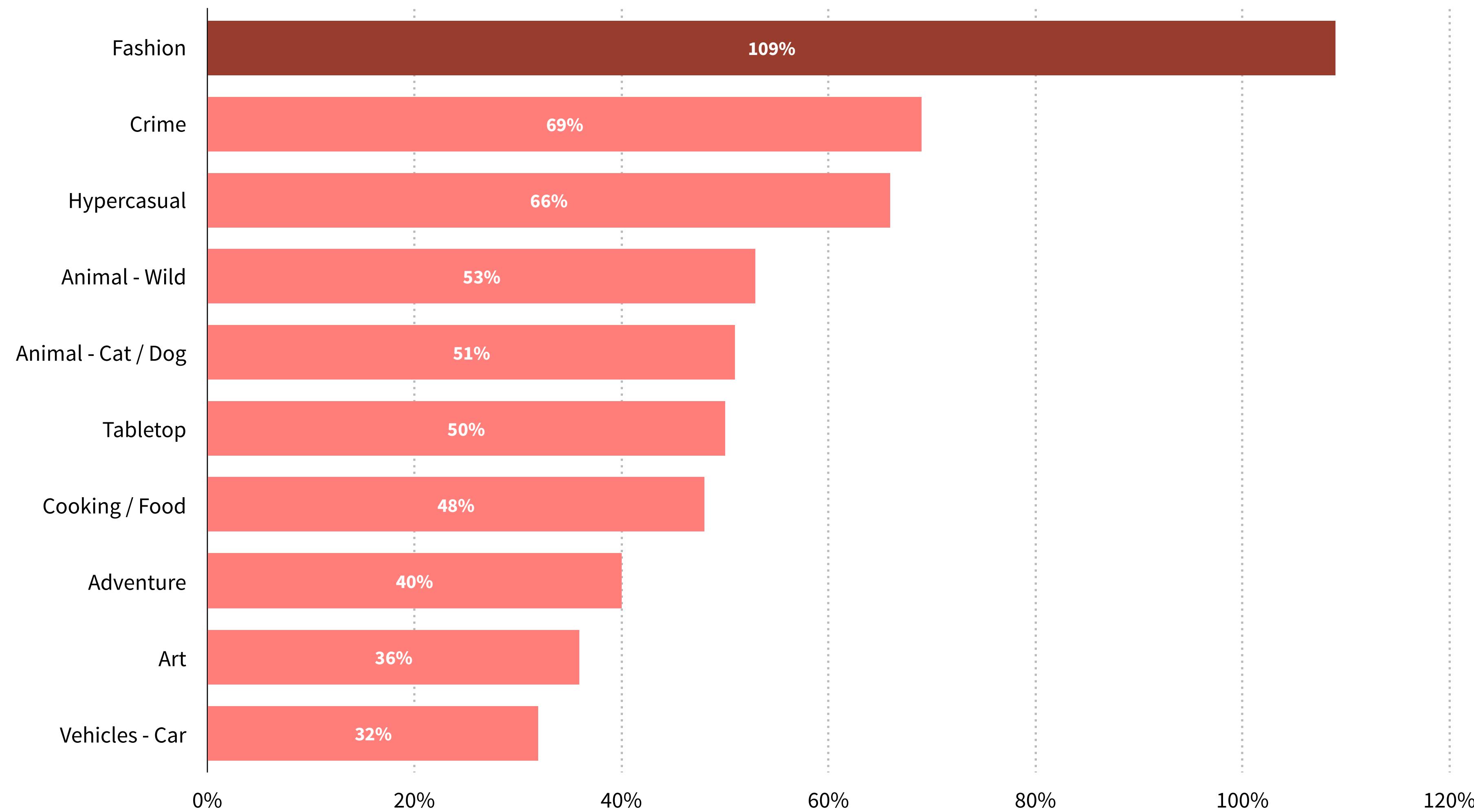


After the game went viral, downloads of Among Us soared 6,000 percent in September 2020 over January numbers, breaking downloads records for the Puzzle genre. Prior the surge, Among Us saw its highest downloads in August 2019, surpassing 3 million downloads in a month for the first time.

Space-themed Puzzle game downloads took off after the launch of the Among-Us-related games, Impostor Academy and Murder Us, in October 2020. The two titles accounted for 91 percent of the downloads of space puzzle games (excluding Among Us) in the last three months of 2020.

The Fashion Theme Surged in Popularity During 2020

Year-over-year download growth of top 100 games in 2020 by theme

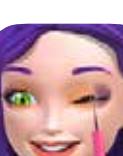


Downloads of the top Fashion-themed games increased by 109 percent year-over-year in 2020, reaching 991 million. These games were more popular on Google Play, which took 84 percent of the installs versus 16 percent from the App Store.

Crime and Hypercasual themes ranked second and third by Y/Y growth, at 69 percent and 66 percent, respectively.

Fashion-Themed Games Saw Success in Growing Markets

Top Fashion-themed games of 2020 by downloads

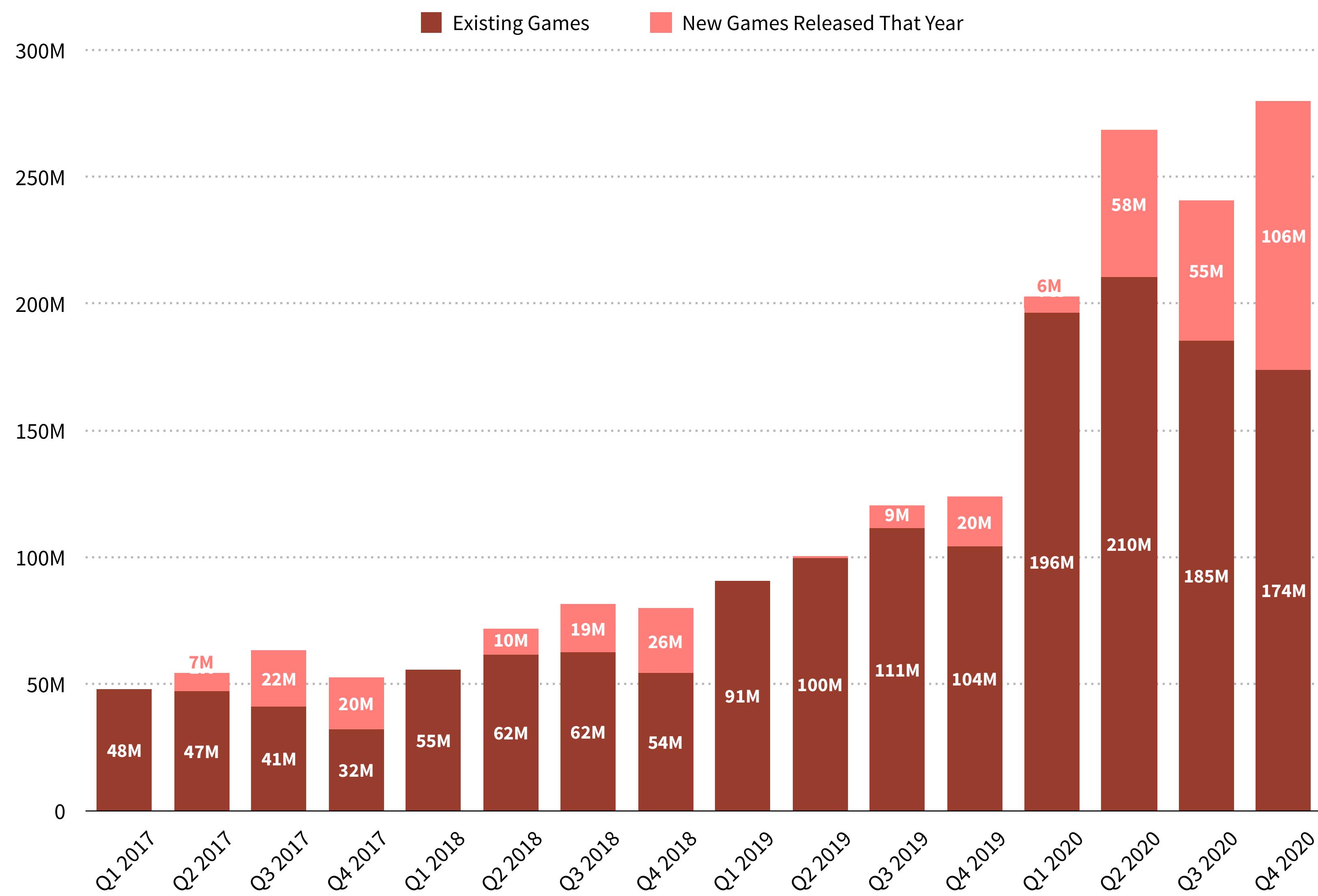
Games/2020 Downloads	Genre	Art Style	Camera POV	Most Popular Country (by Downloads)
 Super Stylist 46.1M	Lifestyle	3D Cartoon	Dynamic	
 Acrylic Nails 38.2M	Hypercasual	3D Cartoon	Isometric	
 Chibi Doll 36.9M	Lifestyle	2D Cartoon	Side	
 Lip Art 3D 36.7M	Hypercasual	3D Realistic	First Person	
 Hair Saloon 35M	Lifestyle	2D Cartoon	Side	
 Super Salon 29.5M	Hypercasual	Hypercasual	First Person	

Super Stylist was the top Fashion-themed game in 2020, surpassing 46 million downloads with Brazil accounting for 13 percent of these. Top Fashion-themed games with Cartoon art styles found the most success in markets such as Brazil and India. Hair Saloon, for instance, saw significant growth in India where downloads increased by 314 percent year-over-year in 2020.

Hypercasual games saw an overall lift in the U.S., including the Fashion-themed games. Acrylic Nails, published by Israel-based Crazy Labs, saw 20 percent of its downloads come from the U.S. app stores in 2020.

New Titles Contributed to Fashion-Themed Game Growth

Global downloads of top 100 Fashion-themed games in 2020



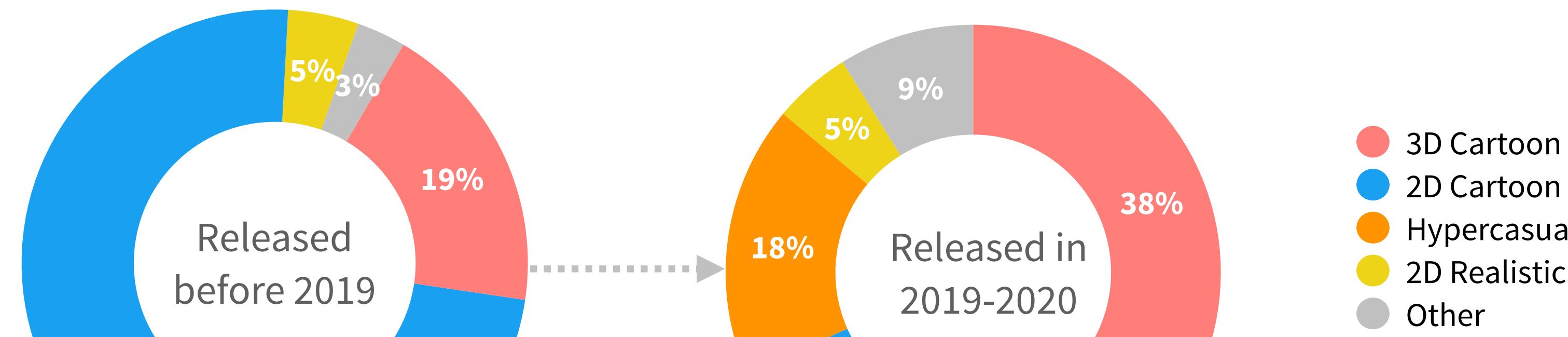
Fashion-themed games are expected to have a great year in 2021, coming off a strong final quarter in 2020 with 280 million downloads among the top games (30 percent of this from games released that year). The success of recently launched games suggests that this space still has room for development and will likely continue to provide growth opportunities for new titles.

Although new games added a major download boost, existing game installs also grew by 76 percent year-over-year in 2020.

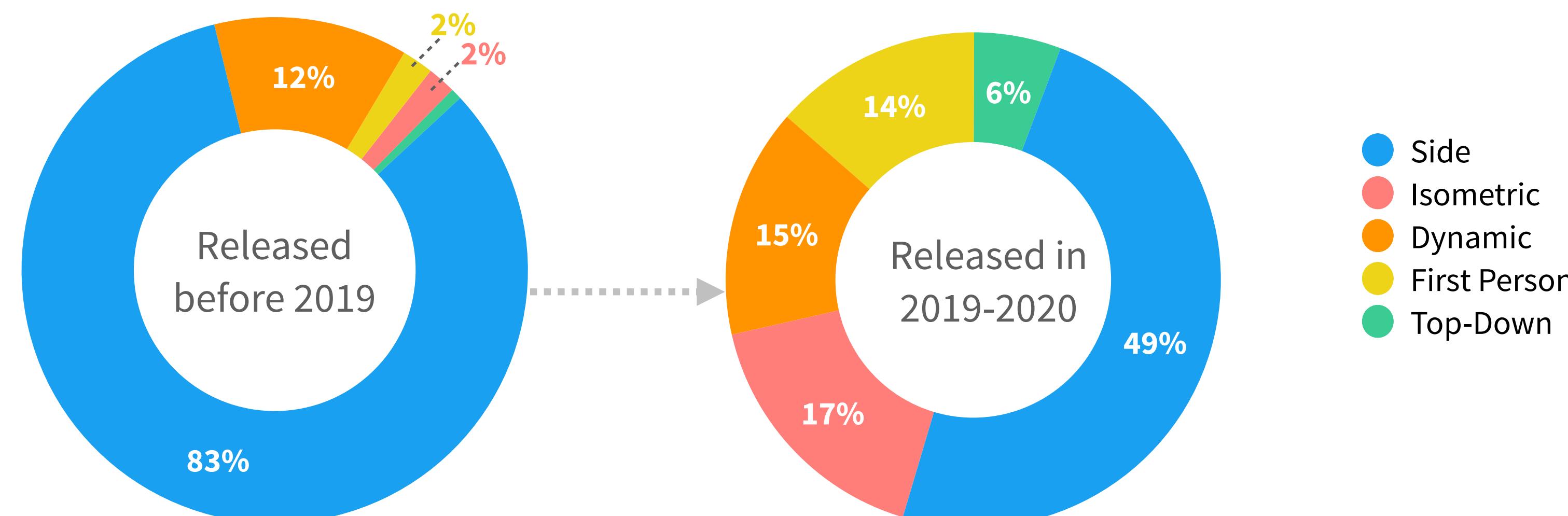
New Fashion-Themed Games are Branching Out

Proportion of downloads in 2020 among top Fashion-themed games by art style and POV

Art Style



Camera POV



Gameplay Trends

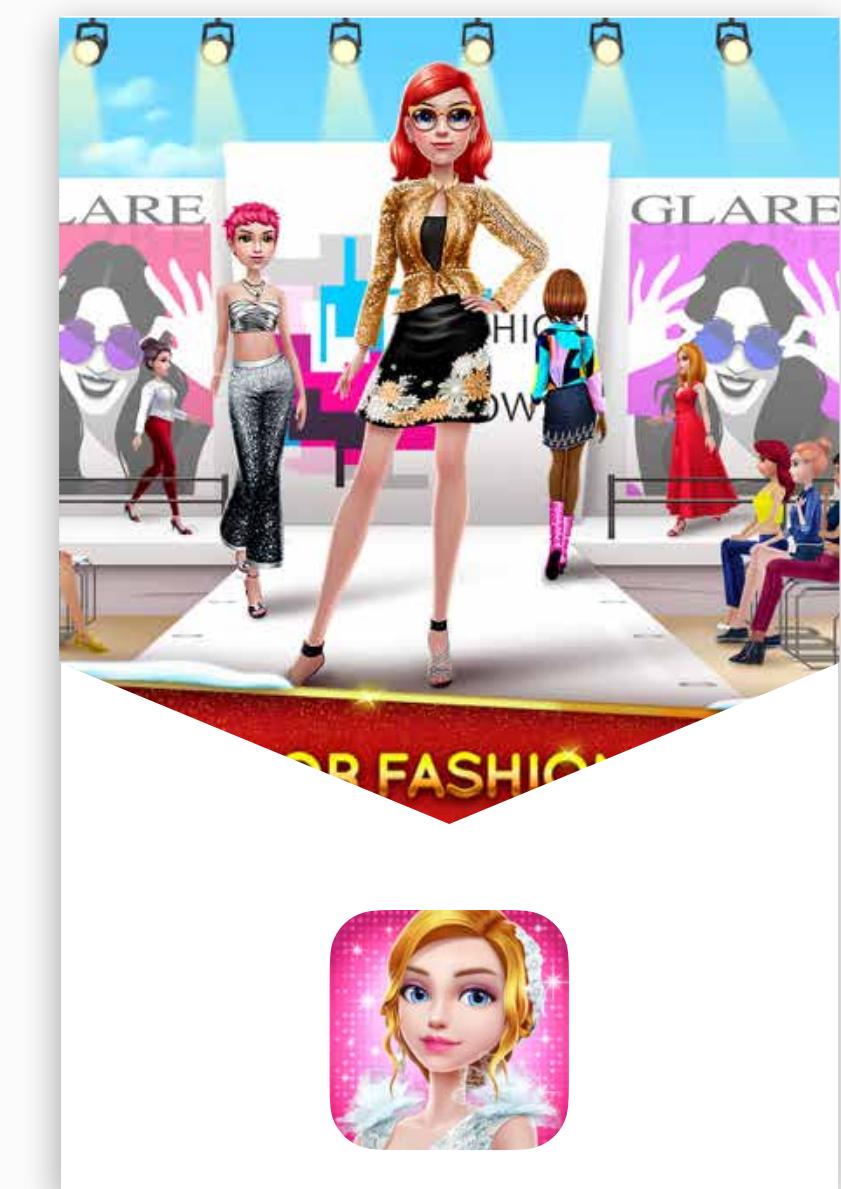
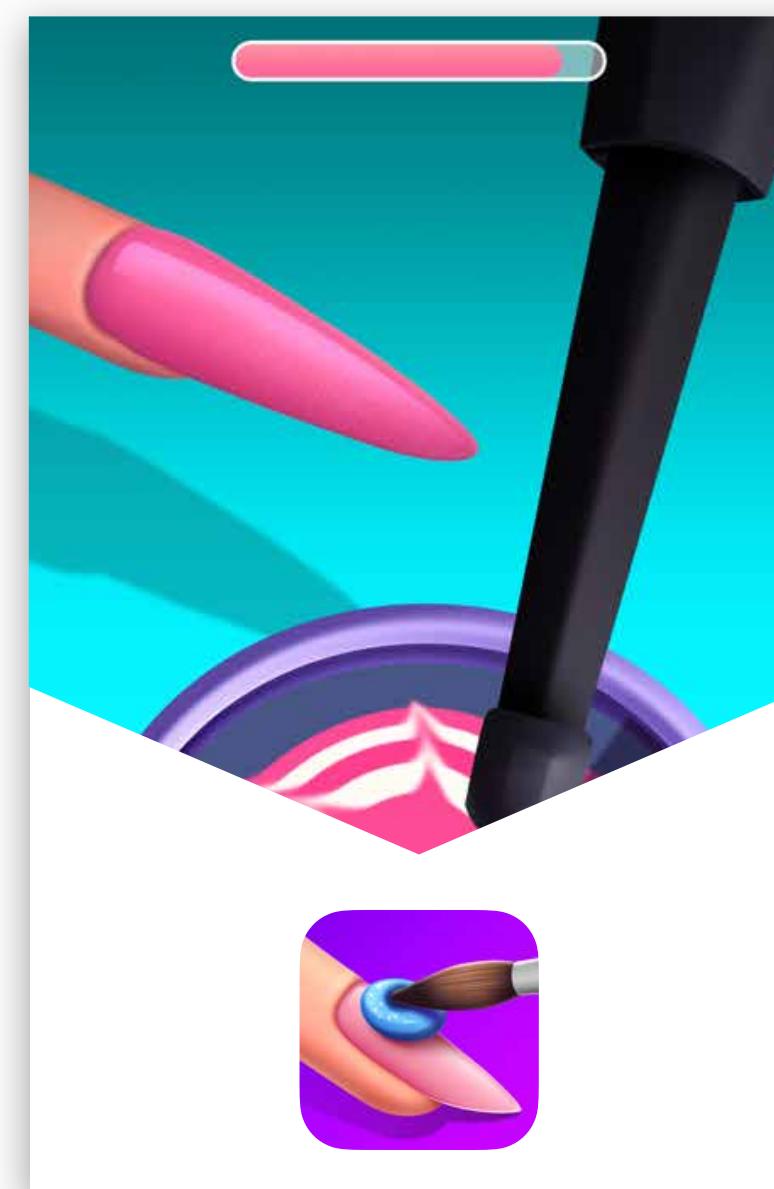
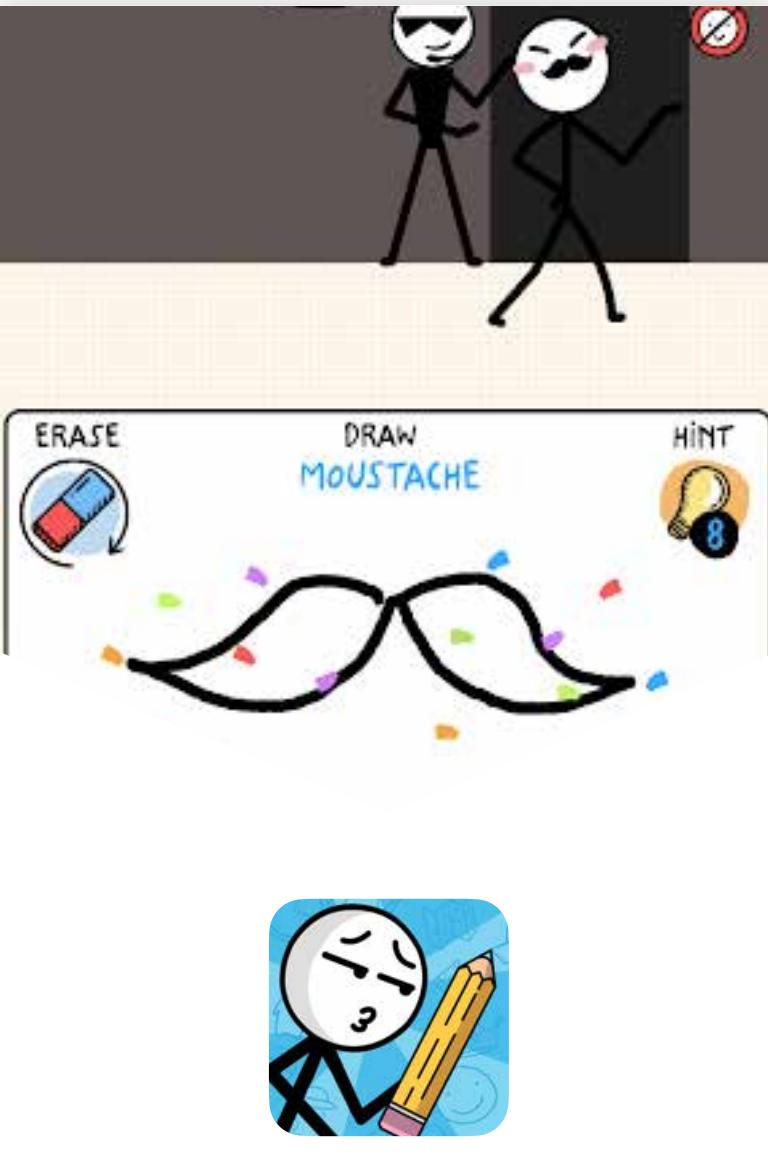
Download growth signals that Fashion-themed games are moving away from 2D Cartoon and toward 3D Cartoon and Hypercasual art styles among newer titles. Games with a 3D Cartoon style accounted for 38 percent of downloads among Fashion-themed titles that launched in the past two years, compared to the 19 percent among older games.

New Fashion-themed games with Isometric and First Person Camera POVs found the most success, accounting for 17 percent and 14 percent of the downloads in 2020, respectively. New Fashion-themed games moved away from Side POV, with the download share shrinking to 49 percent (compared to 83 percent for older games).

Key Takeaways:

Gameplay Trends

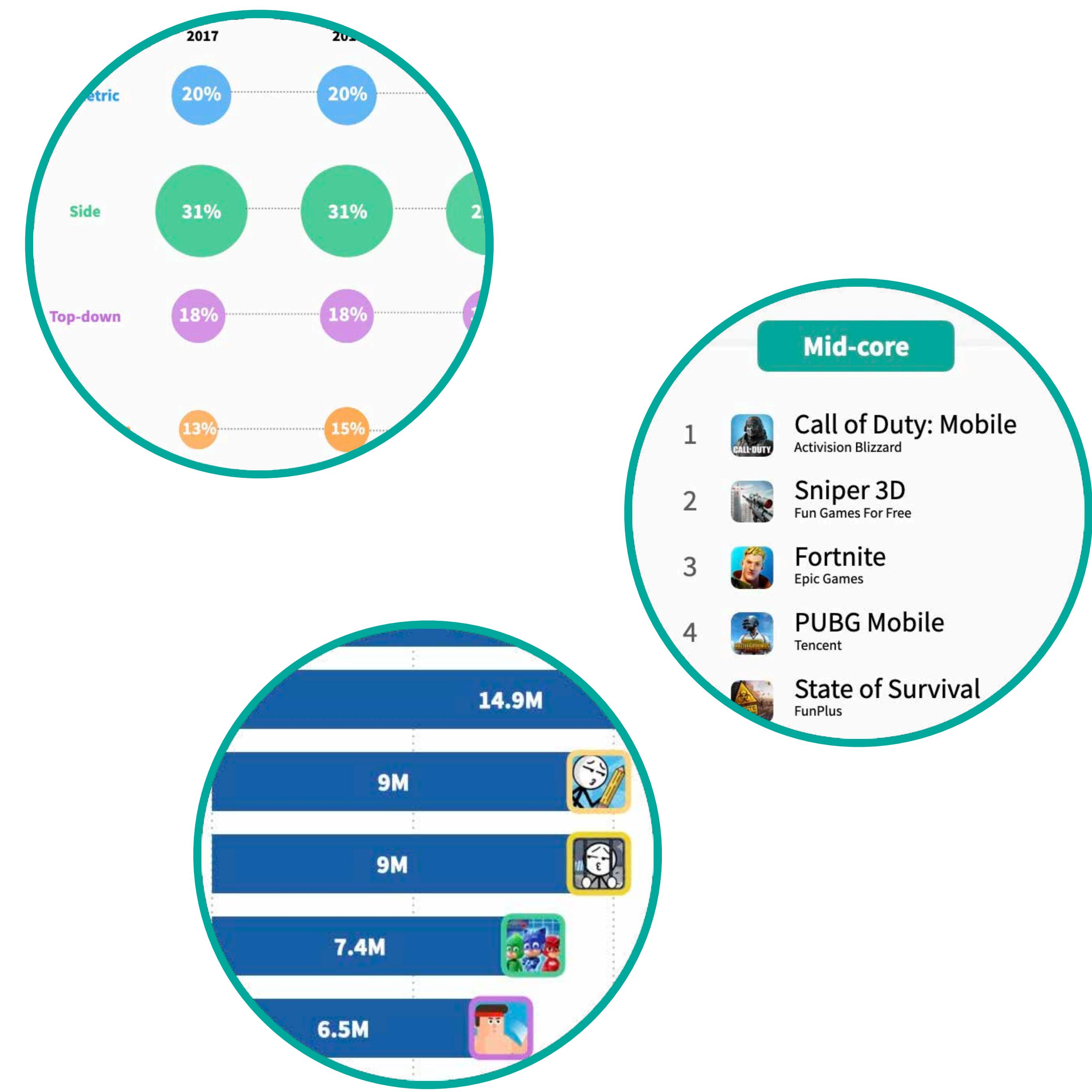
1. **Puzzle games are exploring new themes, with cross-genre themes such as Military and Combat Arena are finding success with new releases in the genre.** One of the first combat-area-themed puzzle game, No One Escape, accumulated 14 million downloads since its release in August 2020.
2. **Fashion, aesthetic and hair games were one of the top growing themes in 2020, seeing a 109 percent lift year-over-year.** Fashion games found the majority of their success in the U.S., India, and Brazil.
3. **The fashion game landscape is still evolving with newer games leading the growth in 2020, creating more opportunities for creative developers.** In terms of gameplay, newer fashion games are shifting away from 2D Cartoon, and moving toward 3D visuals.



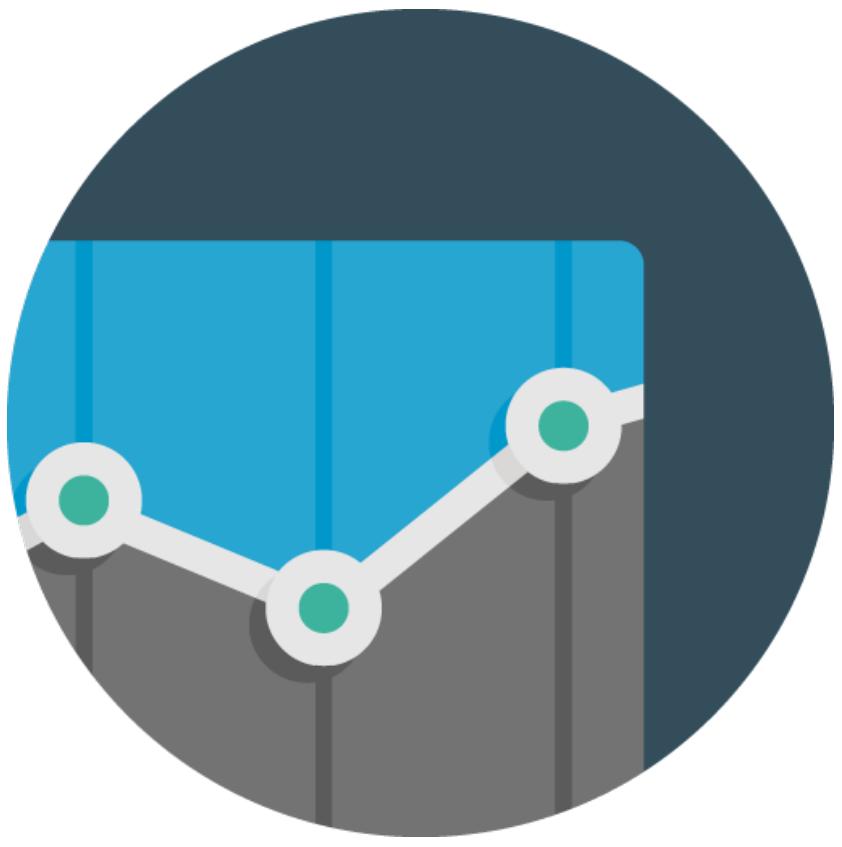
Conclusion

Conclusion

- Hypercasual games enjoyed an overall download lift across global mobile game market in 2020, with installs rising 123 percent year-over-year. Simulation games also stood out as one of the genres that showed great potential for 2021, after seeing a 92 percent growth surge in 2020. The genre's recent success in markets like India and Brazil set it on a similar path to that seen by Hypercasual in 2020.
- 2D Cartoon and the Side POV were the primary elements for top visuals in mobile games in 2020, but recent trends suggest that things are changing. Isometric POV nearly overtook Side POV with 27 percent of downloads in 2020, rising from 24 percent in 2019. It's evident that mobile games are on the way to increasing gameplay variety, especially among newer titles.
- Popular Mid-Core themes are finding success with Puzzle games, such as Combat Arena, Superhero, and Military. As one of the pioneers for cross-genre Puzzle gene games, Top War gained 22 million downloads in its first year of release. It's critical that cross-genre themes not be overlooked by developers as they may open doors for creativity and untapped markets.



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.



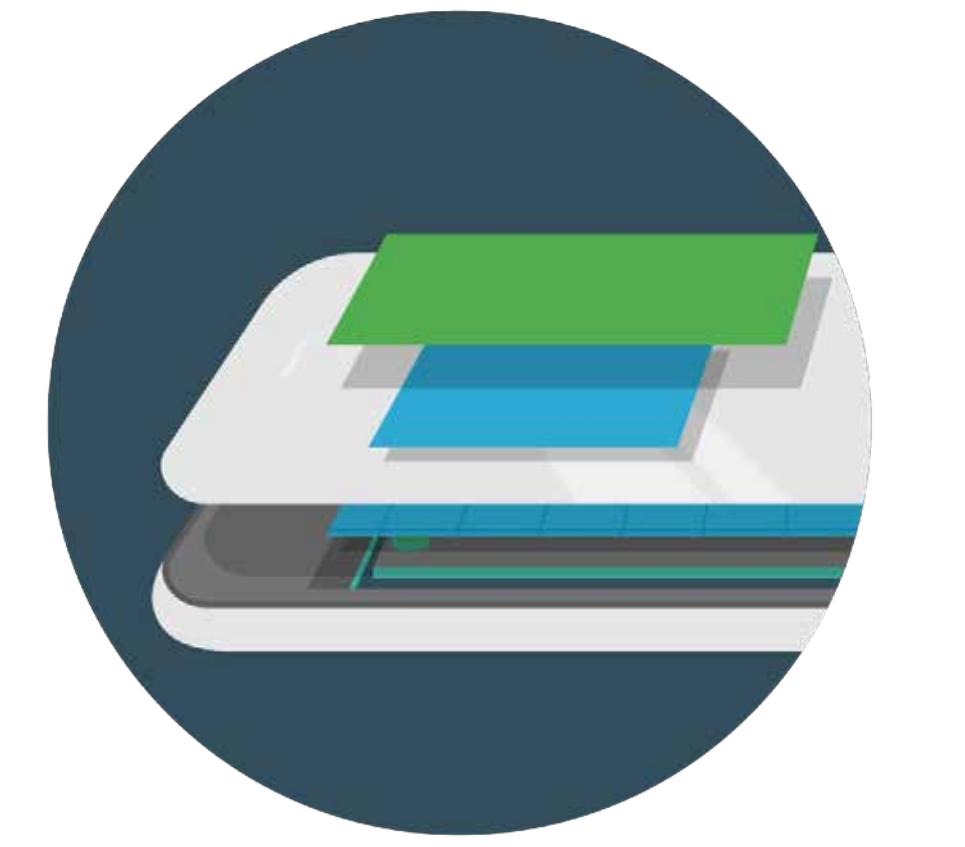
Ad Intelligence

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.

Sensor Tower Terms of Use

This report and all original content contained within are wholly owned by Sensor Tower, Inc. © 2021.

Modification, republication, distribution, or other unauthorized usage violate this copyright, unless express permission has been granted.

App icons, images, and other branding assets are property of their respective publishers and are used expressly for the purpose of editorial commentary.

LOOKING FOR MORE INSIGHTS?

Download our latest **Store Intelligence Data Digest** report on the mobile market at sensortower.com/reports

About Us

Sensor Tower is the leading solution for mobile marketers, app developers, and industry analysts who demand competitive insights on the mobile economy. Sensor Tower's product suite includes: Top Charts, App Intelligence, Store Intelligence, Ad Intelligence, and Usage Intelligence.

Office Locations:

 San Francisco, London, Shanghai, Seoul

Contact Info:

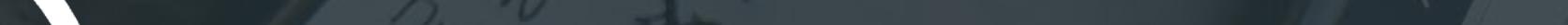
 sensortower.com

 sales@sensortower.com

 [@sensortower](https://twitter.com/sensortower)





Sensor Tower