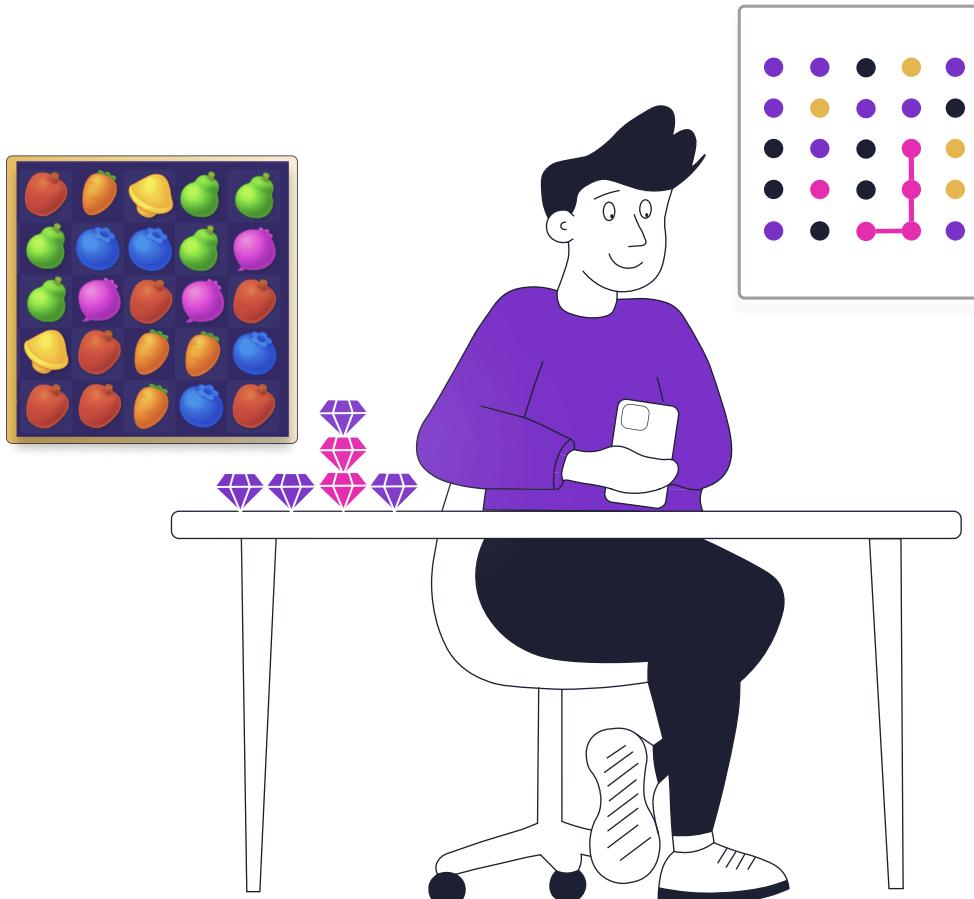


# State of the market: Puzzle Games

## Q1 2023



Report & infographics



# Methodology

The purpose of this study is to analyse the puzzle category of mobile gaming in Q1 2023.

All data presented in this report has been collected from Apptica platform.

Puzzle category is defined by a stores' tag and our own taxonomy.

The basis of this analysis is made up of data from the Apptica's Store, Ad and Market Intelligence sections.

We collect data only from App Store and Google Play, we do not cover other alternative stores.

To obtain accurate results, we have analysed data on 35 countries collected from January 01 to March 31, 2023.

We have not used additional information from other analytical services or resources without mentioning them.



# Top apps | downloads



## Android

		Downloads
1.	 Candy Crush Saga	49,2 M
2.	 Thief Puzzle: to pass a level	22,6 M
3.	 Block Blast Adventure Master	21,8 M
4.	 Gardenscapes	19,4 M
5.	 Fishdom	19 M
6.	 Emoji Puzzle	18,8 M
7.	 Royal Match	15,8 M
8.	 Save the Doge	14,9 M
9.	 Candy Manor - Home Design	13,7 M
10.	 Bubble Shooter Rainbow	13,3 M



## iOS

		Downloads
1.	 Gardenscapes	10,8 M
2.	 Royal Match	8,5 M
3.	 Parking Jam 3D	7,3 M
4.	 Candy Crush Saga	5,4 M
5.	 Block Blast Adventure Master	5,3 M
6.	 Tap Away 3D	4,5 M
7.	 Fishdom	4,4 M
8.	 Homescapes	4,3 M
9.	 Project Makeover	3,9 M
10.	 Woodoku - Wood Block Puzzle	3,6 M



## Top apps | revenue



### Android

		Revenue (USD)
1.	Candy Crush Saga	109,9 M
2.	Royal Match	59,7 M
3.	Gardenscapes	49,1 M
4.	Homescapes	39,7 M
5.	Fishdom	33,7 M
6.	パズル&ドラゴンズ	30,6 M
7.	Empires & Puzzles: Match 3 RPG	29,6 M
8.	Candy Crush Soda Saga	27,9 M
9.	Toon Blast	20,8 M
10.	Triple Match 3D	19,9 M



### iOS

		Revenue (USD)
1.	Royal Match	75,7 M
2.	Gardenscapes	73,6 M
3.	Homescapes	62,9 M
4.	パズル&ドラゴンズ	48 M
5.	Candy Crush Saga	46,4 M
6.	Fishdom	43,4 M
7.	Toon Blast	30,2 M
8.	Candy Crush Soda Saga	29,3 M
9.	Empires & Puzzles: Match 3 RPG	23,4 M
10.	Project Makeover	20,9 M



## Top advertisers in Q1 2023 in terms of traffic share

### Android

		Creatives	Share (%)
1.	 Matchington Mansion	1309	26,5%
2.	 Blockudoku: block puzzle game	2652	6,14%
3.	 Gardenscapes	11 793	5,53%
4.	 Fishdom	22 205	5,38%
5.	 Candy Crush Saga	37 063	4,76%
6.	 Woodoku - Block Puzzle Games	3085	4,34%
7.	 Ball Sort - Color Puzzle Game	1694	3,09%
8.	 Match the Number - 2048 Game	14 983	2,81%
9.	 Homescapes	3576	2,69%
10.	 2248 - Number Puzzle Game	11 252	2,58%

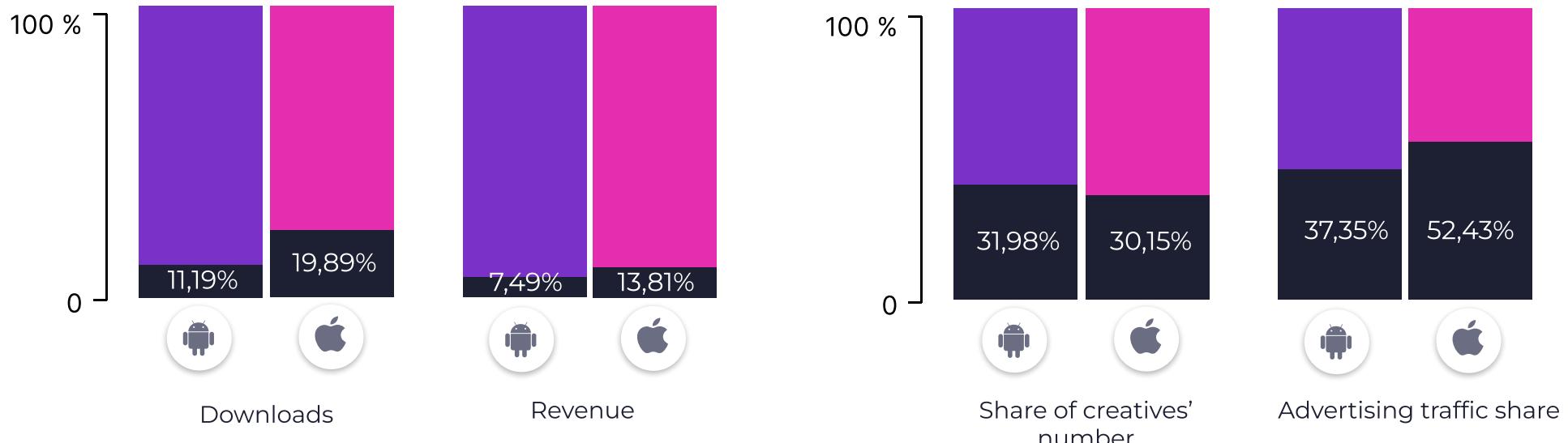
### iOS

		Creatives	Share (%)
1.	 Royal Match	97 416	7,77%
2.	 Gardenscapes	4534	5,95%
3.	 Wordscapes	333	5,16%
4.	 Water Sort Puzzle	5408	4,57%
5.	 Matchington Mansion	425	4,38%
6.	 Travel Town - Merge Adventure	4060	3,94%
7.	 Block Blast Adventure Master	4489	3,67%
8.	 Parking Jam 3D	629	3,37%
9.	 Woodoku - Wood Block Puzzles	933	2,71%
10.	 Match 3D	222	2,67%



## D&R share and Ad State on iOS and Android

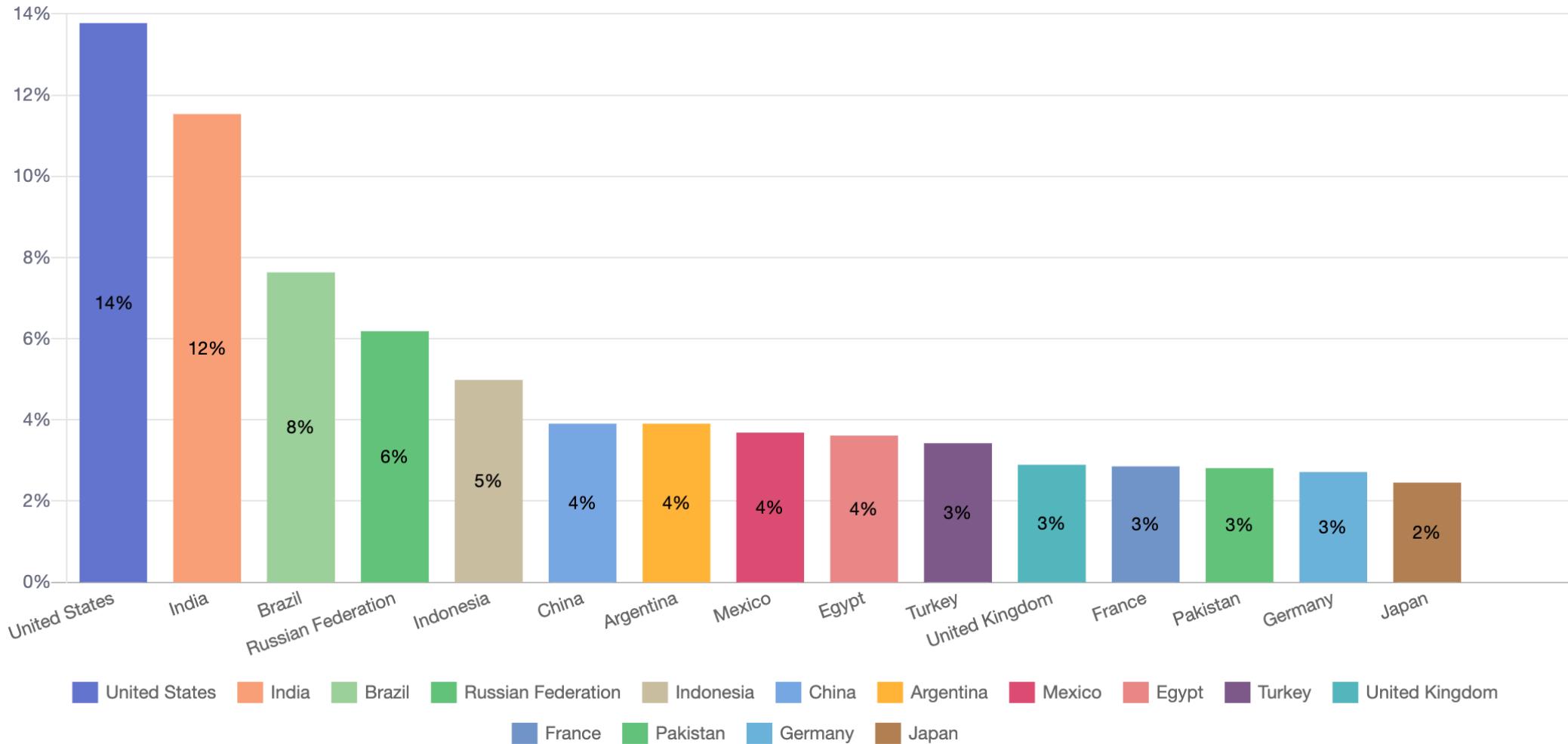
The Puzzle category covers around 20% of all downloads within gaming and around 14% in regards to revenue on iOS. For Android: around 11% for downloads and 7,5% for revenue.



The Puzzle category covers more than a half of ad traffic on iOS (52,5%) and more than 1/3 on Android (37,4%). However, in regards to creatives number, on iOS there are less creatives running (30,2%) than on Android (32%).

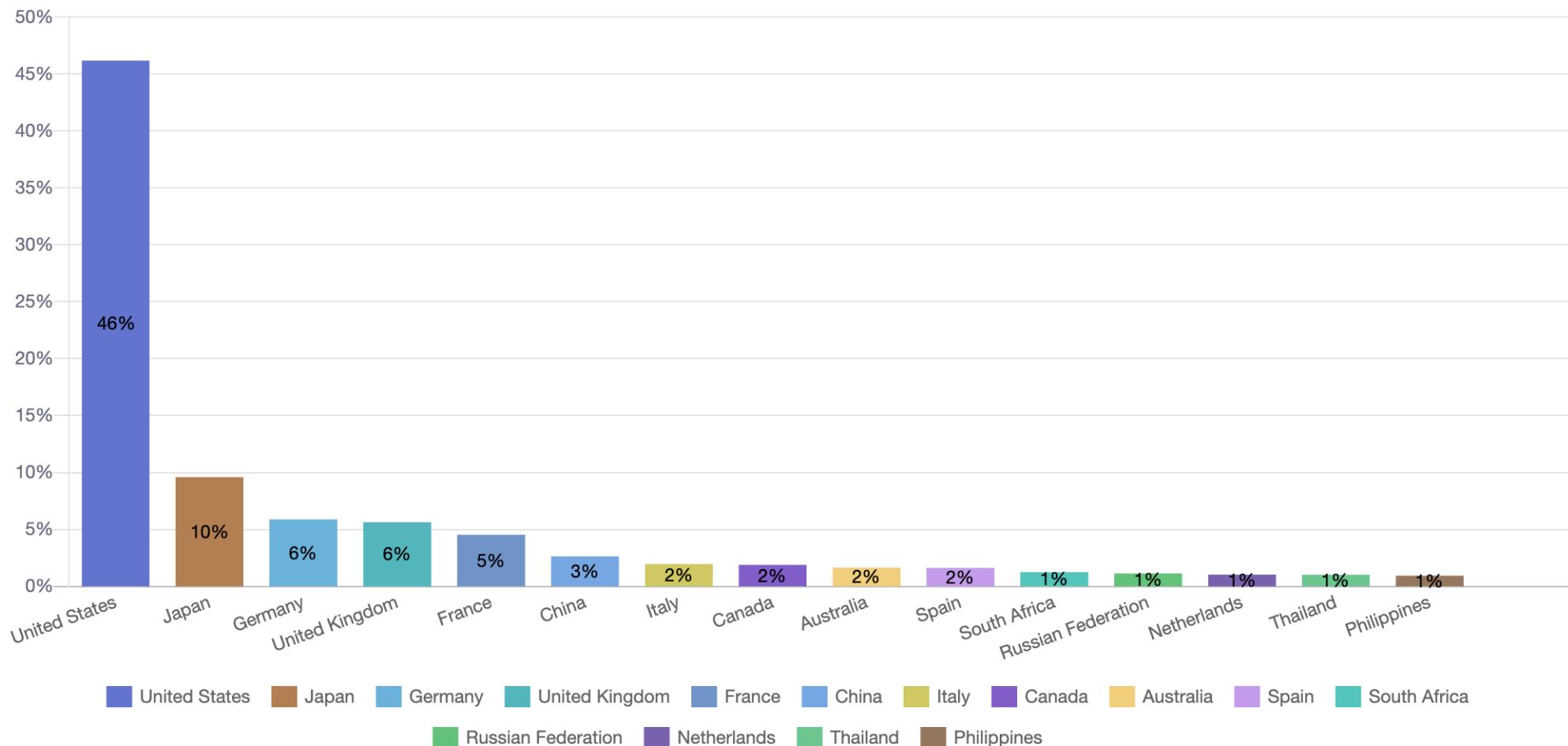


# Top countries | Downloads Share | Q1 2023 | Puzzle





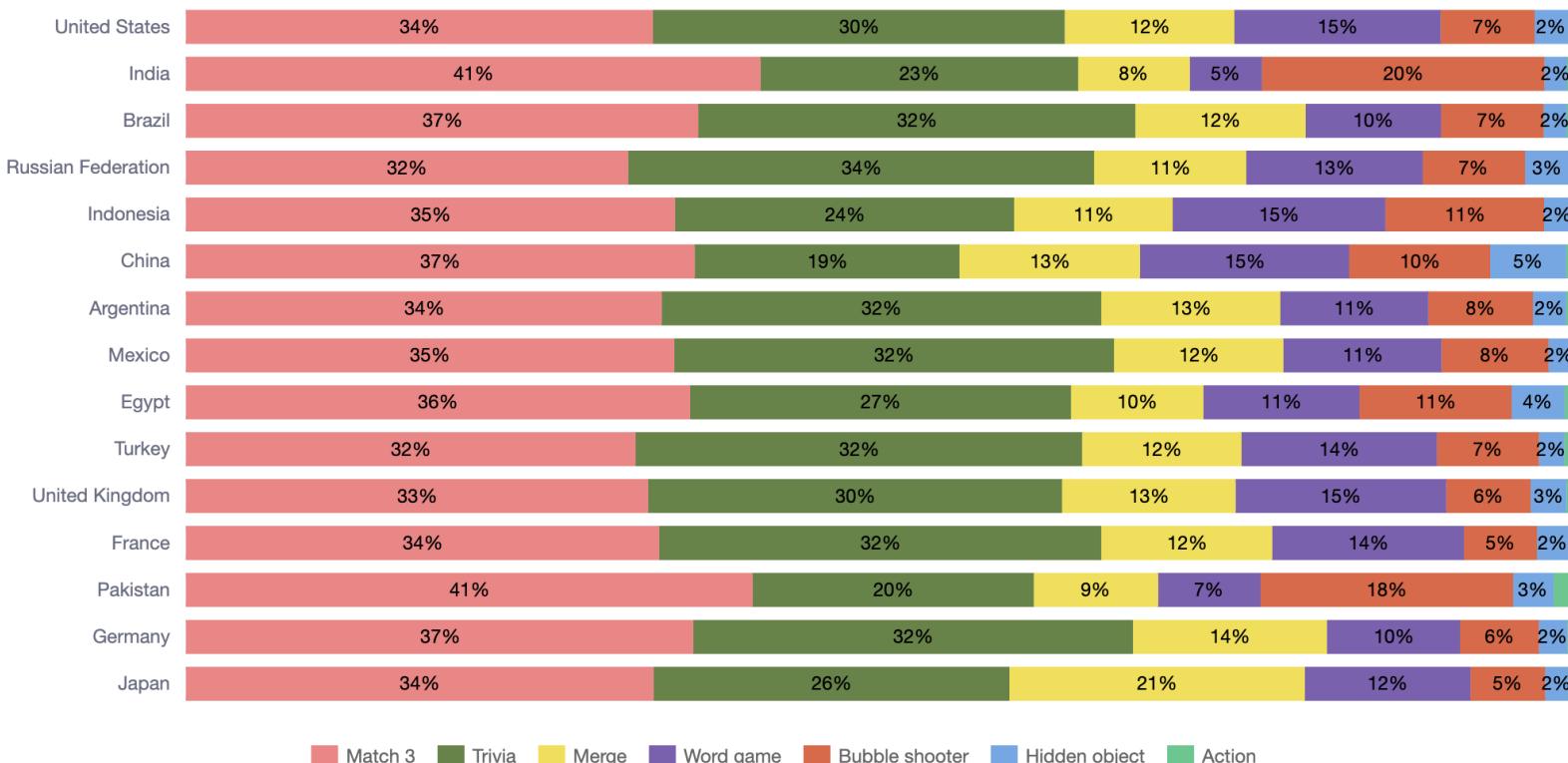
# Top countries | Revenue Share\* | Q1 2023 | Puzzle





## Distribution of subgenres | Downloads | Top 15 countries

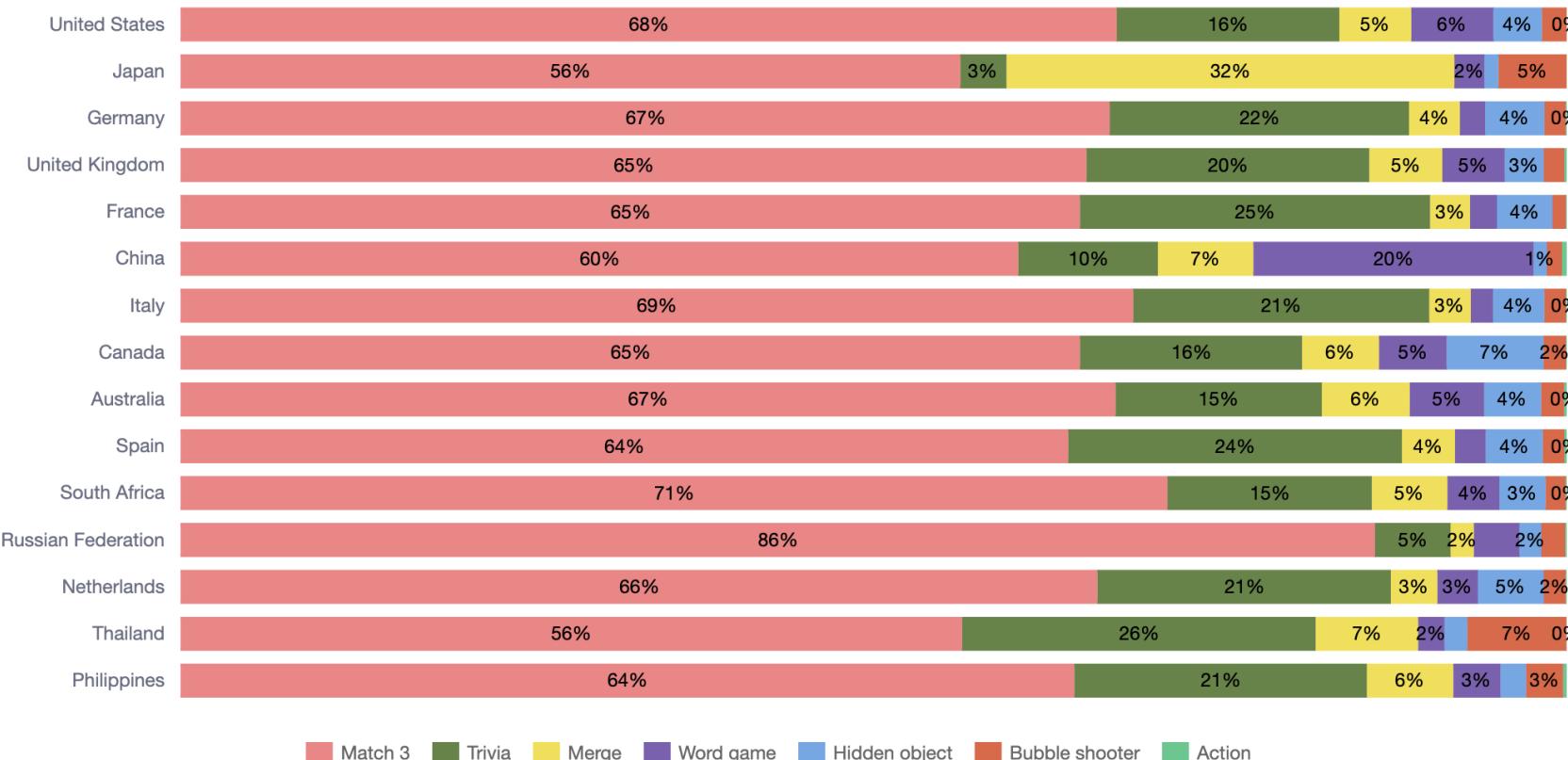
- Match 3 has predominantly the biggest share (on average 1/3 of all downloads), followed by Trivia.
- In India and Pakistan bubble shooter category has a strong position (20% and 18% correspondingly).
- Merge puzzle games take 21% in Japan, that is the biggest share among top 15 countries.
- Hidden object and Action categories are the least popular.





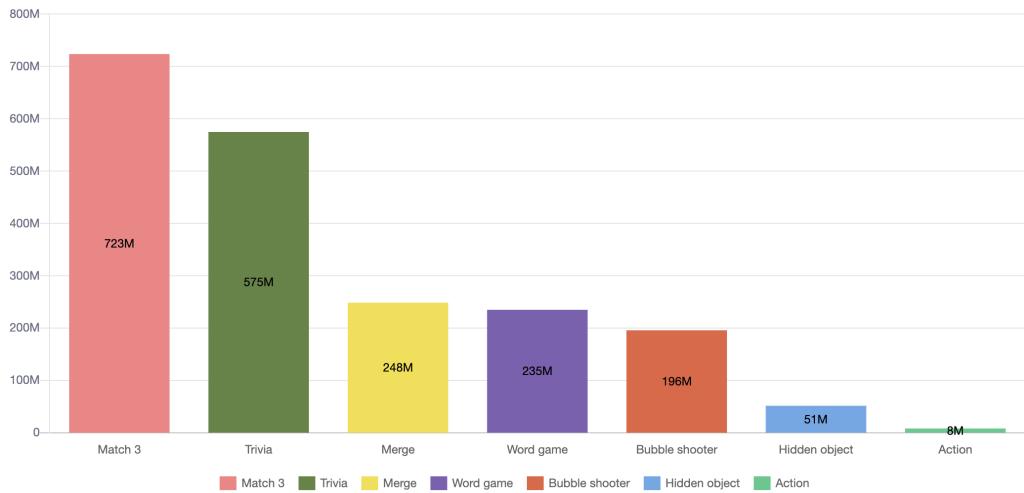
# Distribution of subgenres | Revenue | Top 15 countries

- Match 3 generates the biggest part of revenue (from 56% to 86%).
- Trivia, Merge and Word games split the positions depending on the market: Merge is more profitable in Japan than Trivia, Word game - in China.
- Bubble shooter shares position with Merge in Thailand

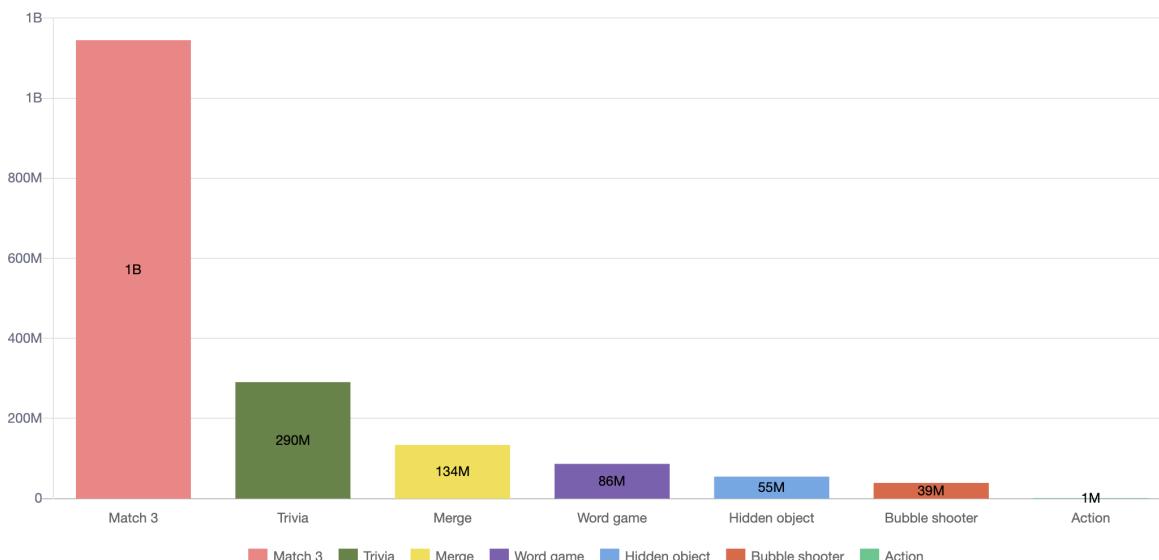




## Distribution of subgenres | Downloads



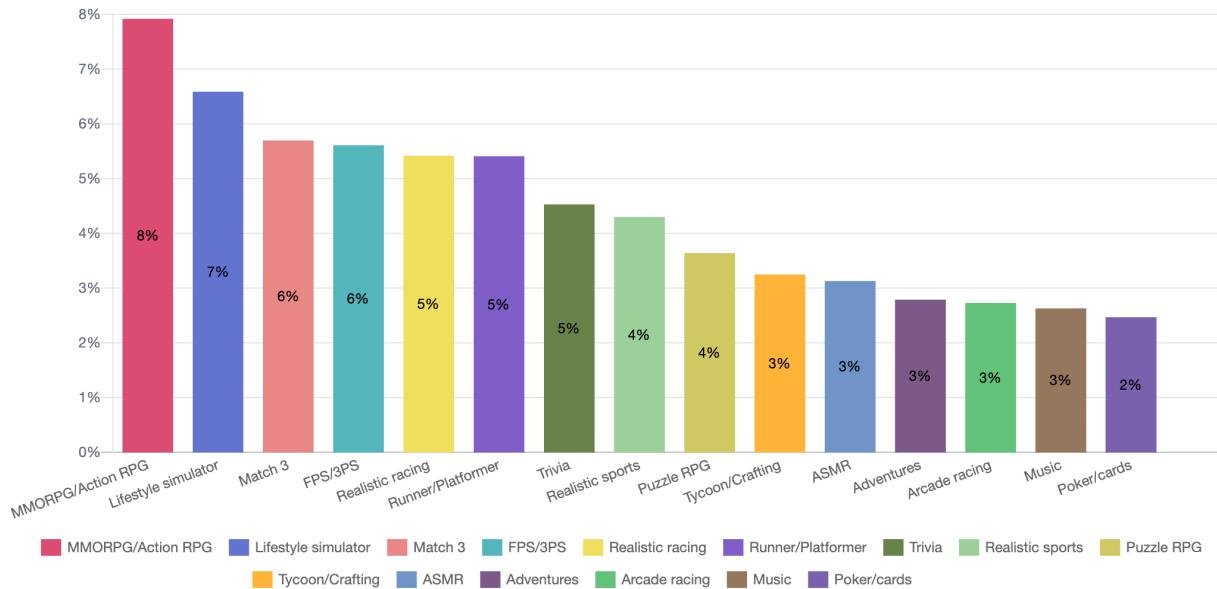
## Distribution of subgenres | Revenue



Match 3 takes a leading position in terms of Downloads (36%) & Revenue (65%) followed by Trivia, Merge and Word games. Bubble shooter has a bigger share of downloads (10%), but a less profitable position (2%) compared to Hidden object (3% of D&R).



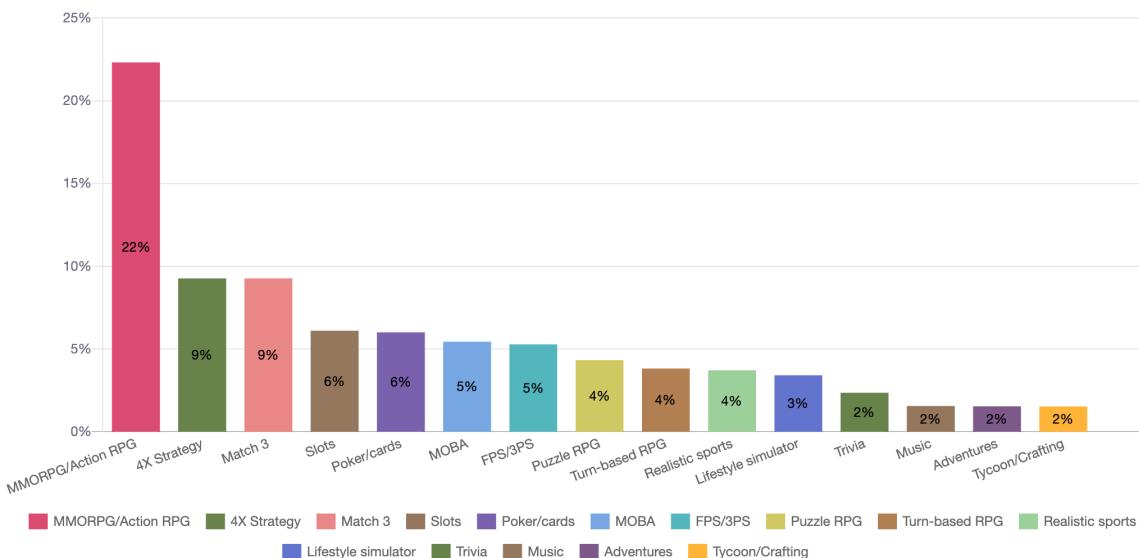
## Distribution of gaming genres | Downloads



Match 3 cover 6% of all downloads in gaming category lagging behind only MMORPG (8%) and Lifestyle simulator (7%). As for revenue, Match 3 shares the second position with 4X Strategy (9%) while the first position is taken by MMORPG (22%) .



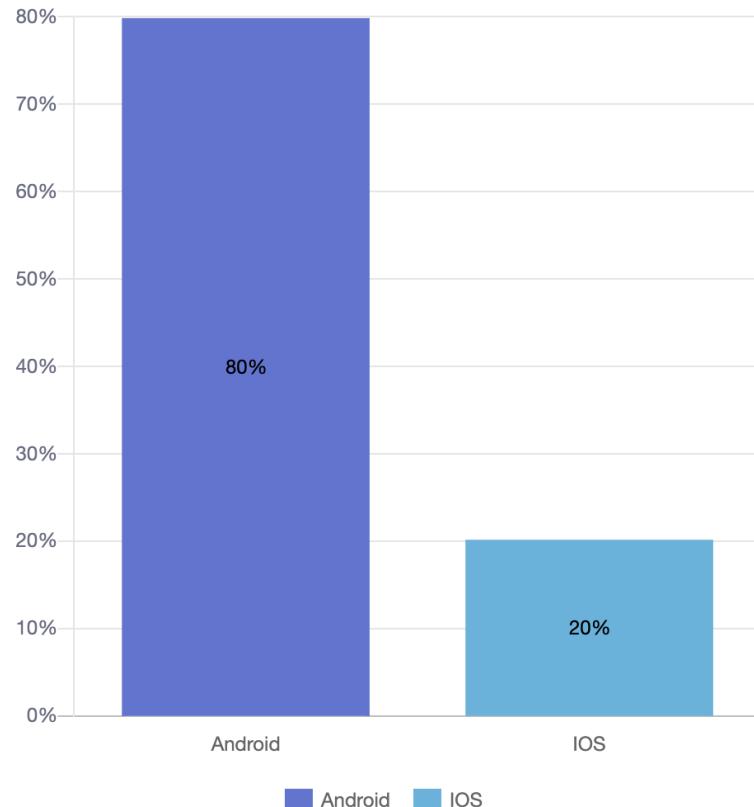
## Distribution of gaming genres | Revenue



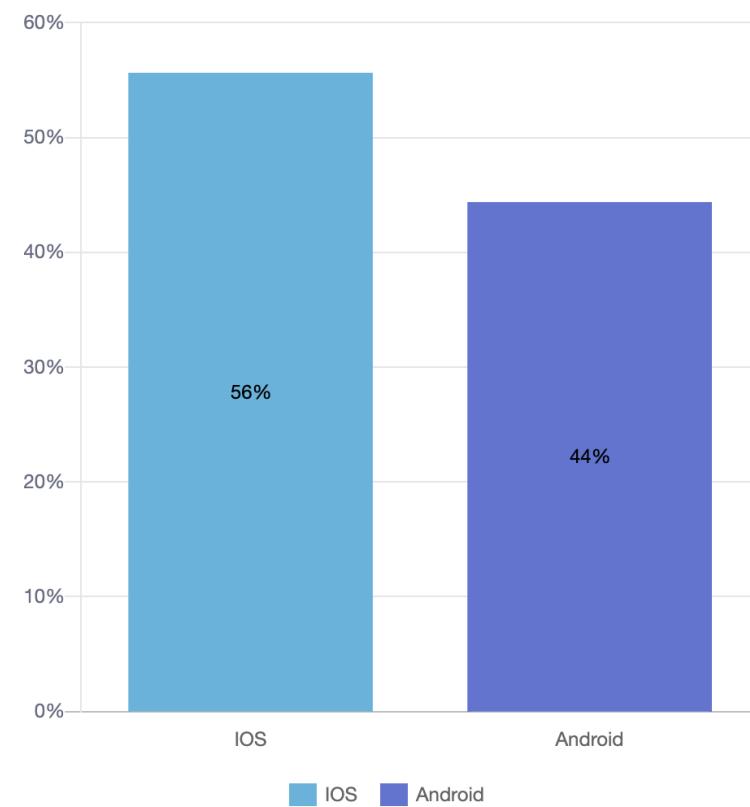


## Platform distribution | Q1 2023 | Puzzle

Downloads Share



Revenue Share



Disparity between Android and iOS for downloads is 4 times (80% vs 20%), however, iOS covers 56% of revenue vs 44% coming from Android.



## Key Takeaways

- Candy Crush Saga is a leader in revenue for both platforms combined (156,3 M USD). Royal Match generates the biggest share on iOS (75,7 M).
- Regarding downloads, Gardenscapes takes a top position on iOS (10,8 M), whereas Candy Crush Saga - on Android (49,2 M). For both platforms combined, Candy Crush Saga enjoys a leading position (54,6 M).
- Matchington Mansion takes the biggest ad traffic share on Android (26,5%), whereas Royal Match - on iOS (7,77%).
- The Puzzle category covers around 20% of all downloads within gaming and around 14% in regards to revenue on iOS. For Android: around 11% for downloads and 7,5% for revenue.
- The Puzzle category covers more than a half of ad traffic on iOS (52,5%) and more than 1/3 on Android (37,4%). However, in regards to creatives number, on iOS there are less creatives running (30,2%) than on Android (32%).
- Within Puzzle category Match 3 has predominantly the biggest share (on average 1/3 of all downloads), followed by Trivia. Hidden object and Action categories are the least popular.



## Key Takeaways

- Top 5 countries in terms of downloads: US, India, Brazil, Russia, Indonesia; Top 5 countries in terms of revenue: US, Japan, Germany, UK, France.
- In India and Pakistan bubble shooter category has a strong position (20% and 18% correspondingly). Merge puzzle games take 21% in Japan, that is the biggest share among top 15 countries.
- Match 3 generates the biggest part of revenue (from 56% to 86%). Trivia, Merge and Word games split the positions depending on the market: Merge is more profitable in Japan than Trivia. Bubble shooter shares position with Merge in Thailand.
- Match 3 takes a leading position in terms of Downloads (36%) & Revenue (65%) followed by Trivia, Merge and Word games. Bubble shooter has a bigger share of downloads (10%), but a less profitable position (2%) compared to Hidden object (3% of D&R).
- Match 3 cover 6% of all downloads in gaming category lagging behind only MMORPG (8%) and Lifestyle simulator (7%). As for revenue, Match 3 shares the second position with 4X Strategy (9%), while the first position is taken by MMORPG (22%).
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