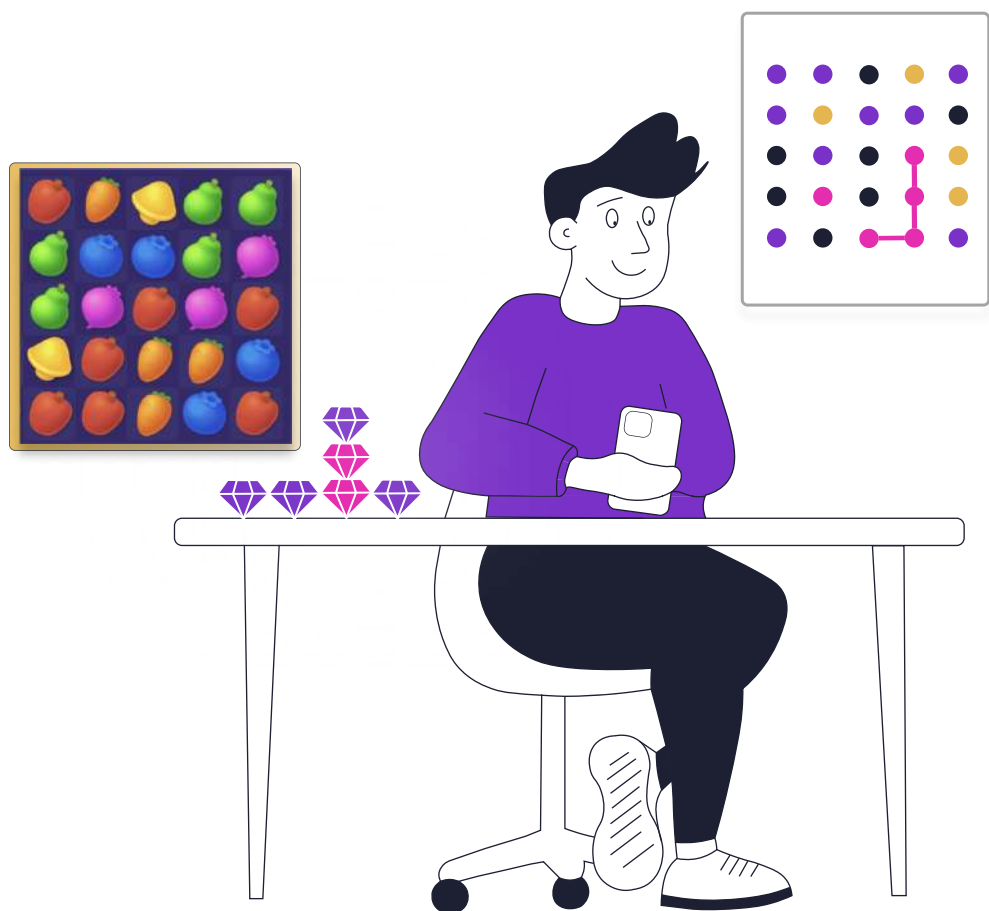


State of the market: Puzzle Games

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

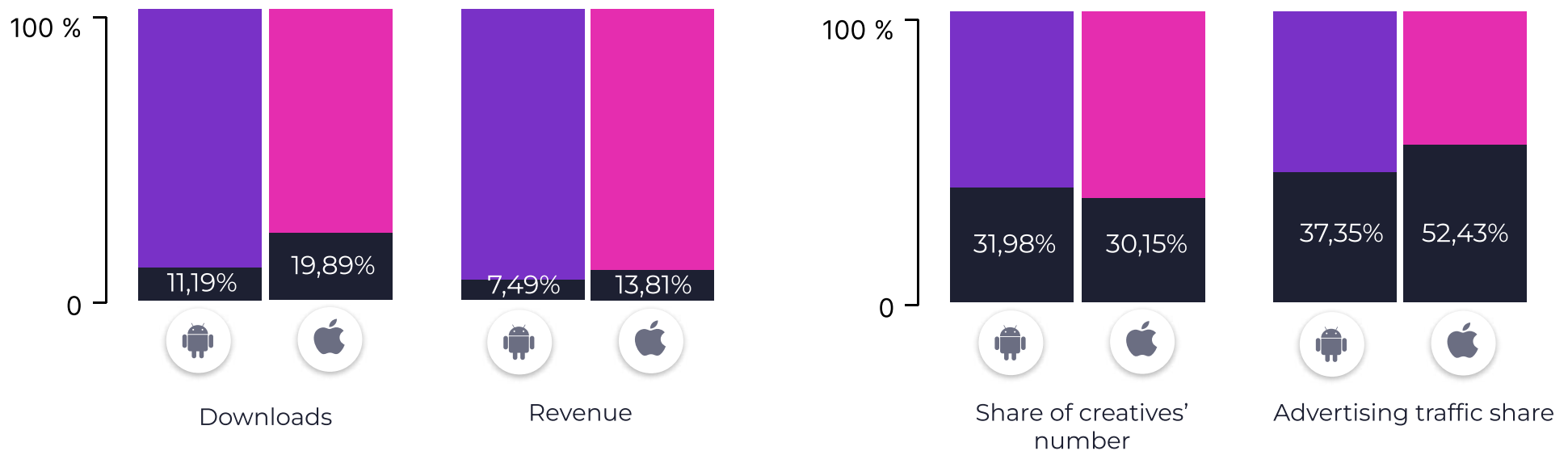
Top advertisers in Q1 2023 in terms of traffic share

|  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

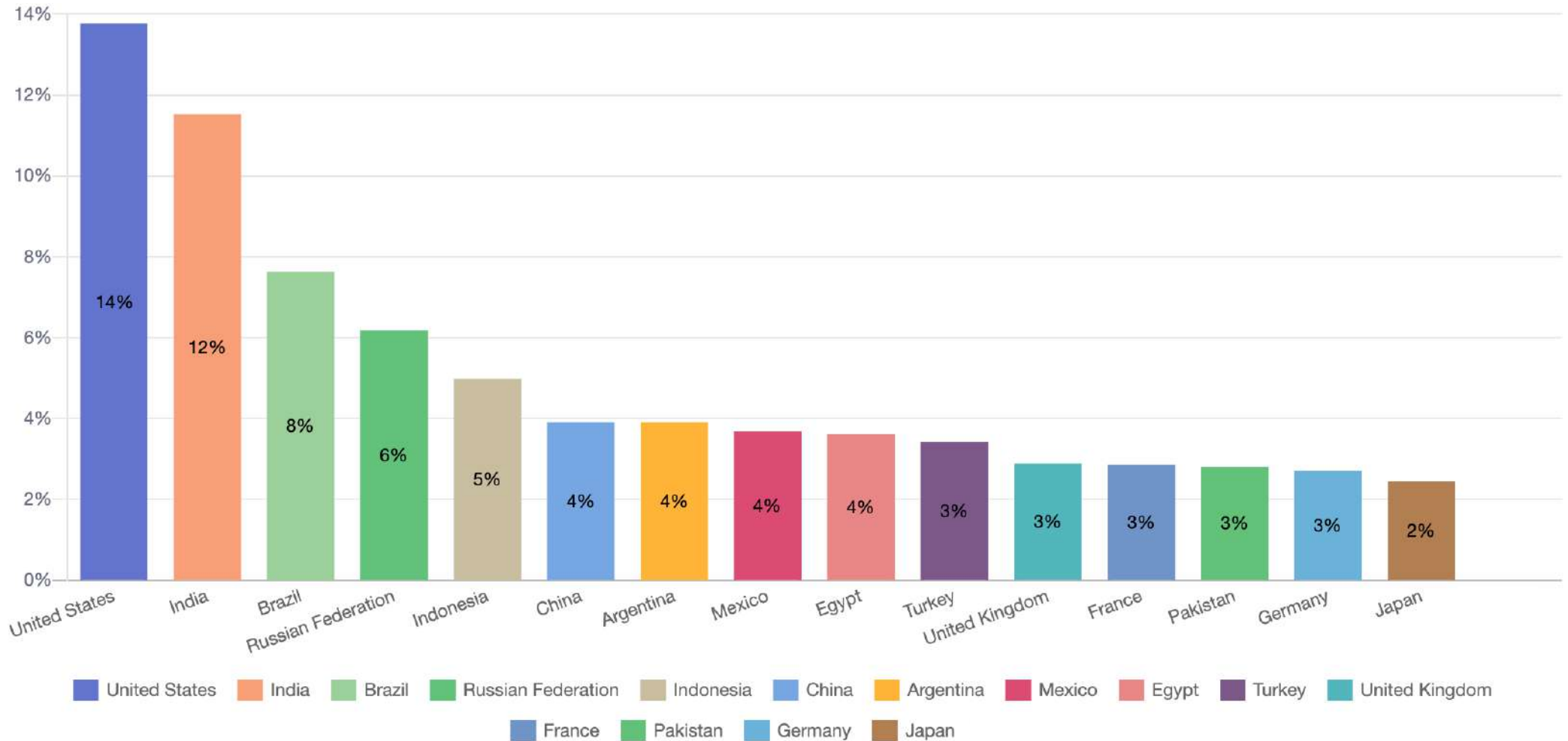
The Puzzle category covers around 20% of all downloads within gaming and around 14% in regards to revenue on iOS. For Android: around 11% for downloads and 7,5% for revenue.



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%).

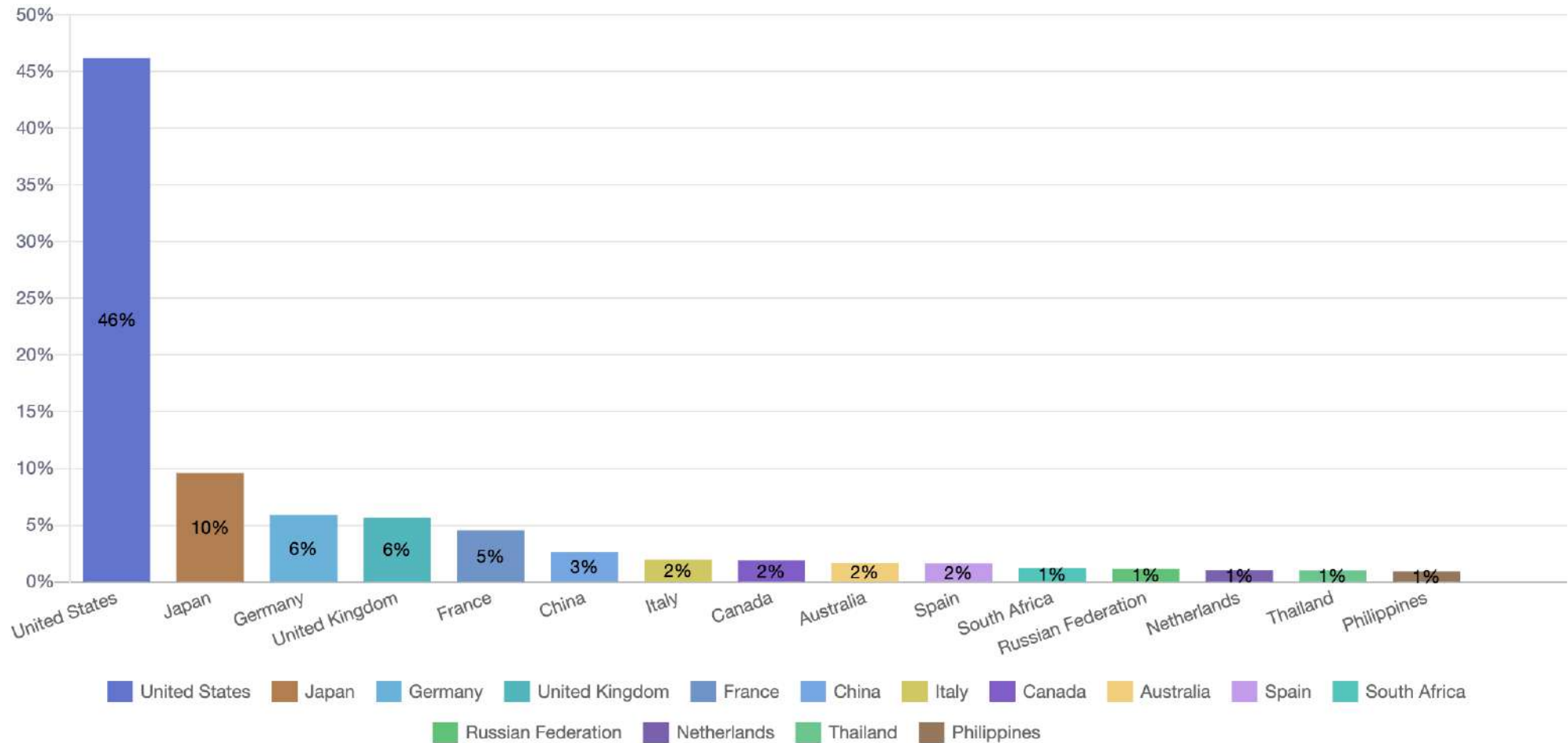


Top countries | Downloads Share | Q1 2023 | Puzzle





Top countries | Revenue Share* | Q1 2023 | Puzzle

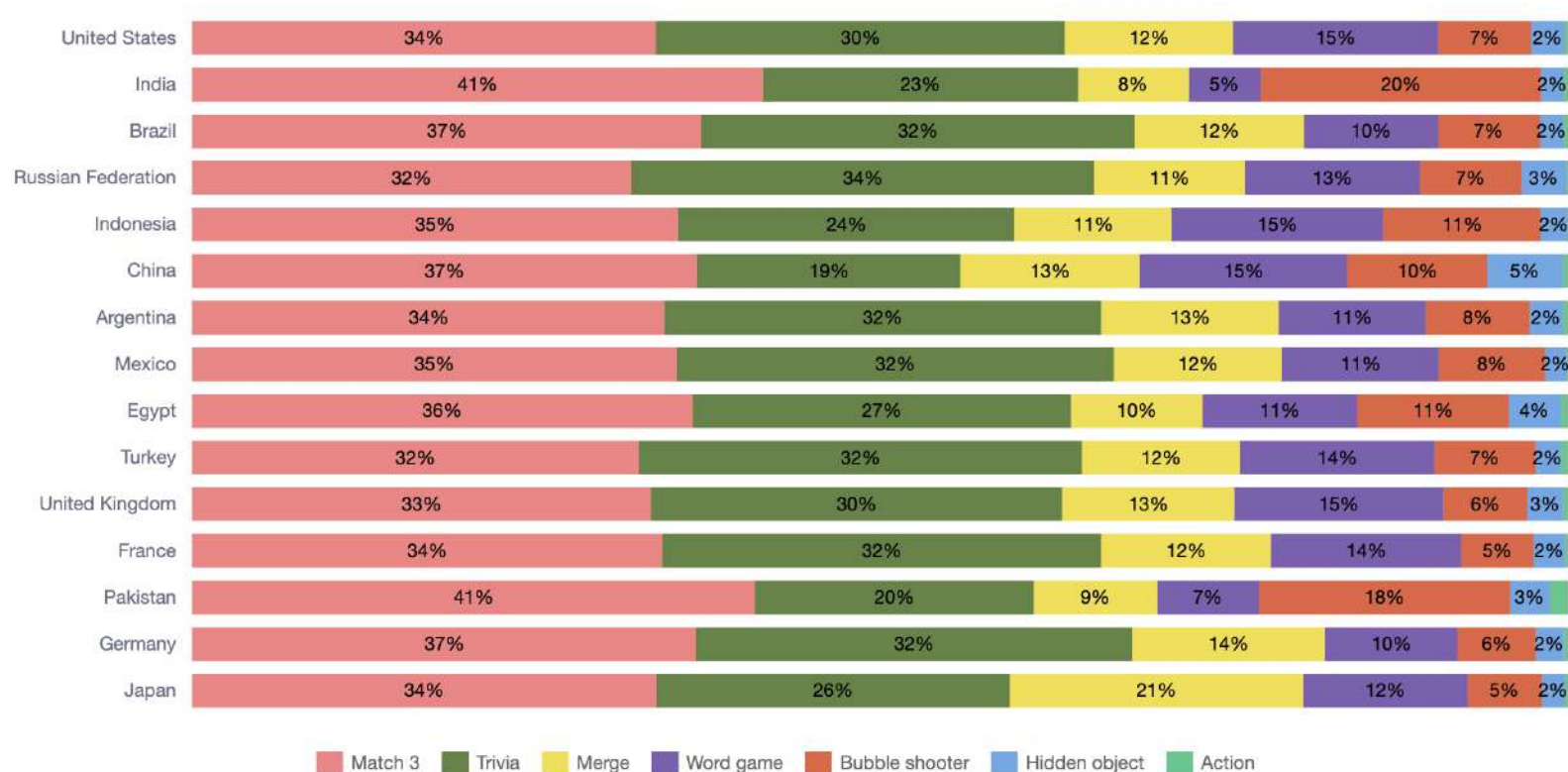


*Revenue covers in-app purchases and do not include other revenue sources



Distribution of subgenres | Downloads | Top 15 countries

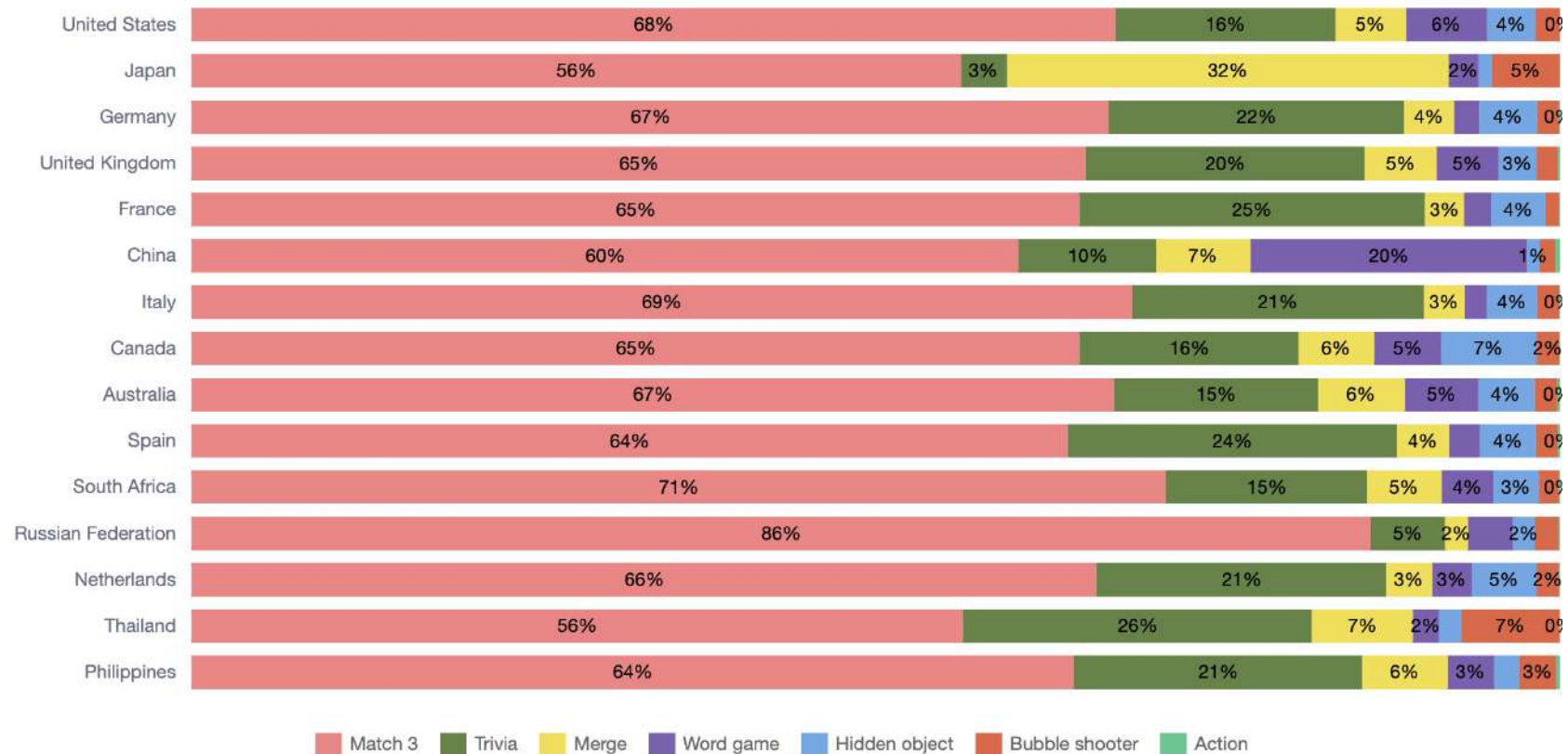
- Match 3 has predominantly the biggest share (on average 1/3 of all downloads), followed by Trivia.
- In India and Pakistan bubble shooter category has a strong position (20% and 18% correspondingly).
- Merge puzzle games take 21% in Japan, that is the biggest share among top 15 countries.
- Hidden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



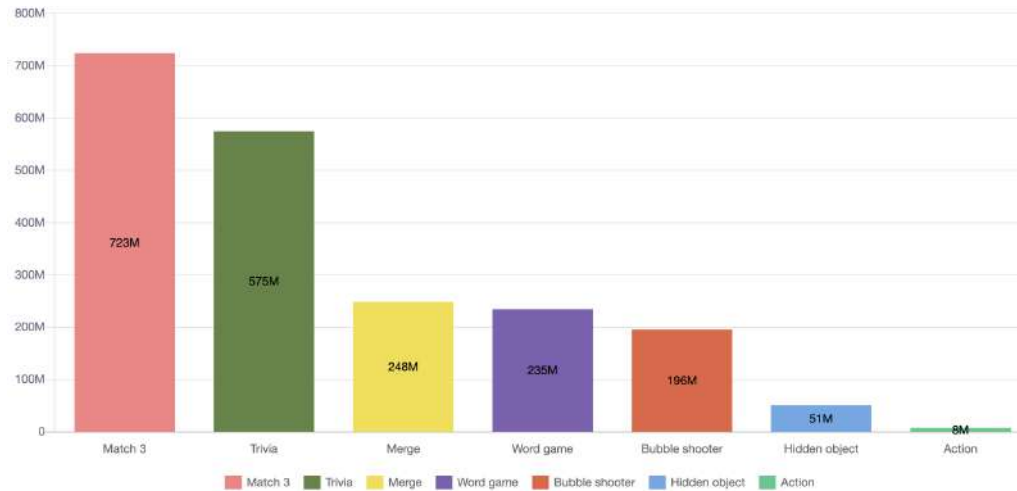


Distribution of subgenres | Revenue | Top 15 countries

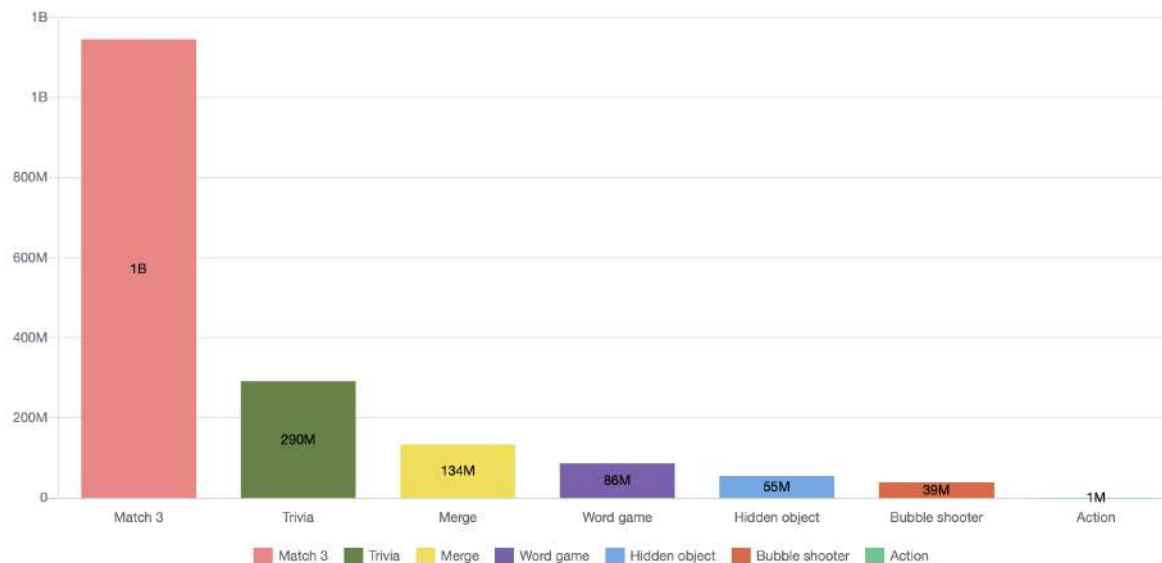
- Match 3 generates the biggest part of revenue (from 56% to 86%).
- Trivia, Merge and Word games split the positions depending on the market: Merge is more profitable in Japan than Trivia, Word game - in China.
- Bubble shooter shares position with Merge in Thailand



Distribution of subgenres | Downloads



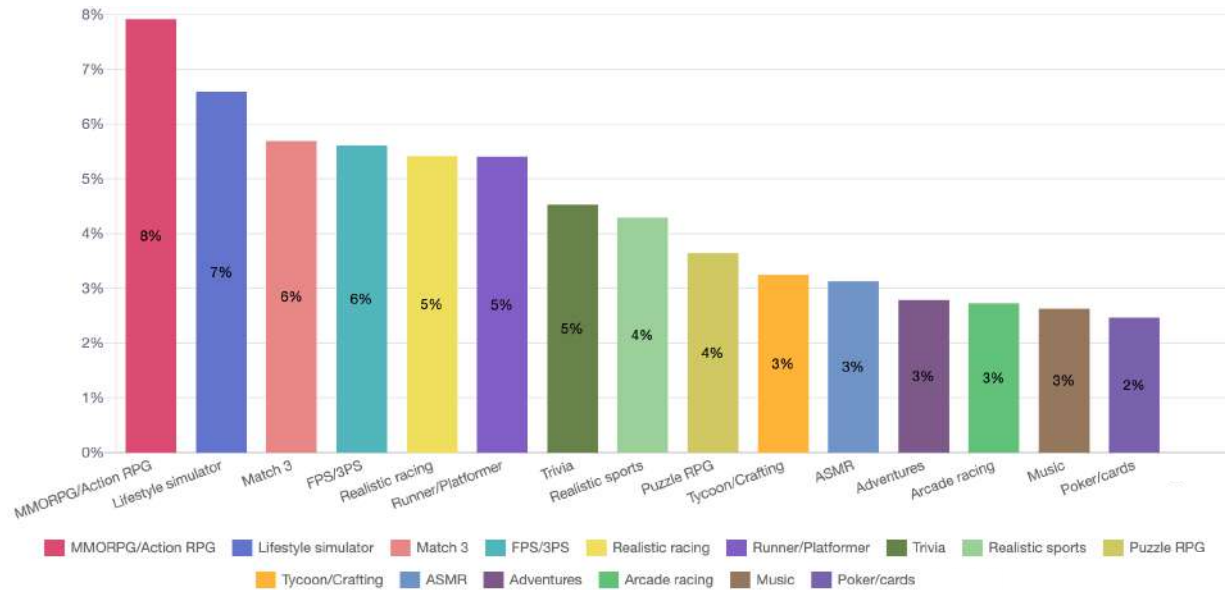
Distribution of subgenres | Revenue



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).



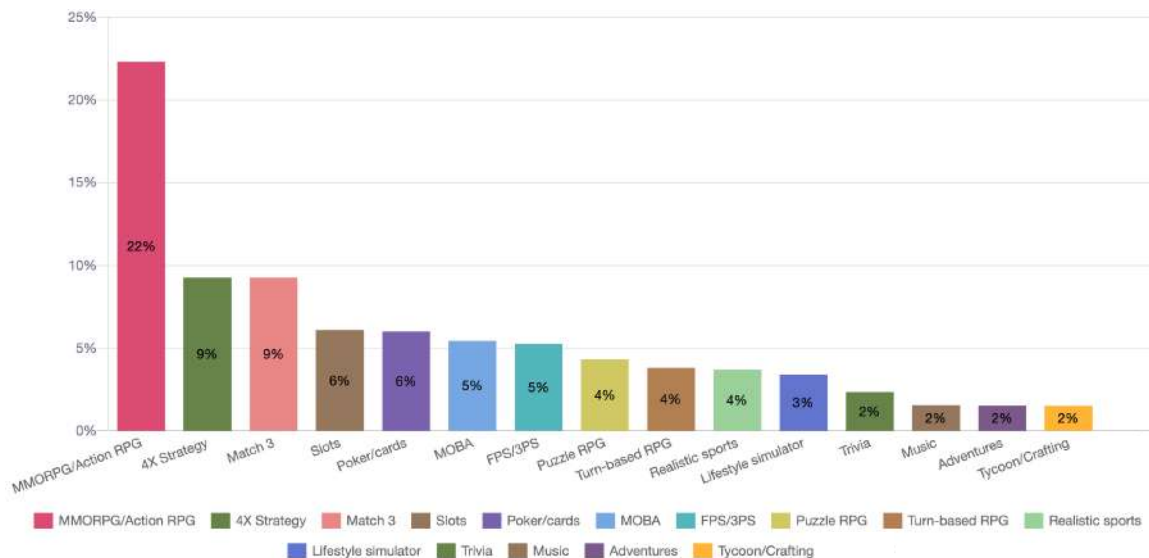
Distribution of gaming genres | Downloads



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%) .



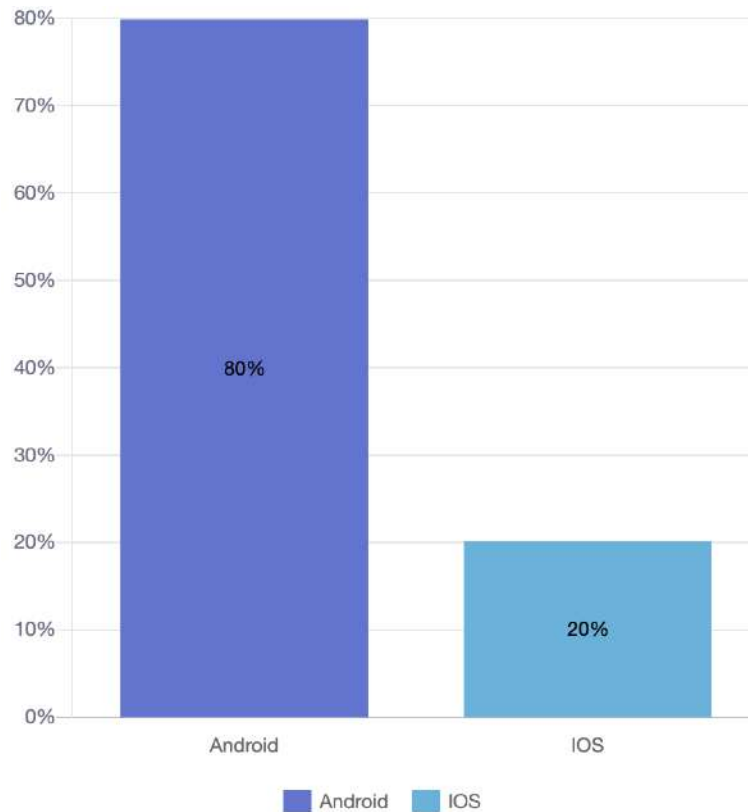
Distribution of gaming genres | Revenue



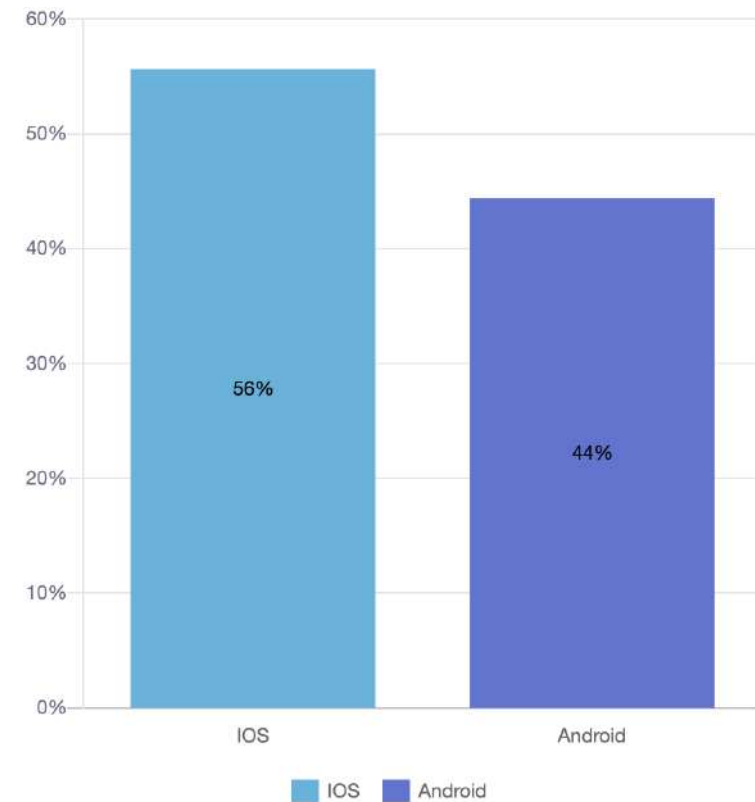


Platform distribution | Q1 2023 | Puzzle

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



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