Sensor Tower

The State of **Puzzle Games**

An Analysis of the Puzzle Category in Mobile Gaming

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Introduction

This report provides an analysis of the updated Sensor Tower Puzzle Taxonomy. Discover trends in revenue and downloads of various Puzzle sub-genres over the past two years.

Explore the top 10 games ranked by downloads and revenue and how they leverage multiple Meta and Monetization features for success.

Finally, explore the trends in Product Models over the past two years, with a special focus on the rise of the Hybridcasual Product Model and the new opportunities it brings to the Puzzle gaming landscape.

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About This Data

Sensor Tower's Qualitative Insights team created the revenue and download forecasts featured in this report using the Sensor Tower Store Intelligence platform.

- Figures cited in this report reflect App Store and Google Play consumer spending and download estimates for January 1, 2018 through Jun 15, 2023.
- All revenue figures in this report capture consumer spending (gross revenue). This includes the revenue earned by the app developer as well as the portion earned by Apple or Google.
- Android estimates represent revenue and downloads from the Google Play Store only. Sensor Tower does not provide spending or download estimates for third-party Android stores.

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New Puzzle Sub-Genre Definitions

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Swap - Players swap adjacent pieces to create a match of two or more identical pieces.

Blast - Puzzle games where players "blasts" tiles by tapping on matching colors.

Chain - Players create chains of matching pieces to remove them from the board.

Pair - Players match groups of two or more identical pieces or tiles in order to remove them from the board.

Sort - Players arrange pieces in the correct order. The pieces may be laid out randomly or partially sorted, players need to determine the best way to arrange them.

Jigsaw - Players recreate an image by arranging and fitting together small, interlocking puzzle pieces.

Real-Time - Players are presented with a series of puzzles that require quick thinking and problem-solving in real-time. Players need to quickly strategize and adjust movements to keep up with the fast-paced gameplay.

Riddle - Players use logical reasoning to solve riddles. The goal is to find the correct solution by carefully considering all of the available information and options.

Physics - Players use the knowledge of physical concepts and manipulate objects such as rope, balls, blocks to solve puzzles.

Environmental - Players are presented with a series of challenges that require them to navigate the environment, and solve puzzles by exploring and manipulating objects in a given environment.

Block - Players drag bricks to create full lines on a grid, either vertically or horizontally to break bricks and score points. There are typically no time limits and bricks cannot be rotated

Maze - Players navigate through a complex network of passages, dead ends, and obstacles.

Numbers - Games that involve manipulating numbers in order to solve the puzzle.

Other Puzzle - Puzzle games that do not fit into other Puzzle sub-genres. Like Tic Tac Toe and Puzzle Hub.

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Puzzle Games Market Overview

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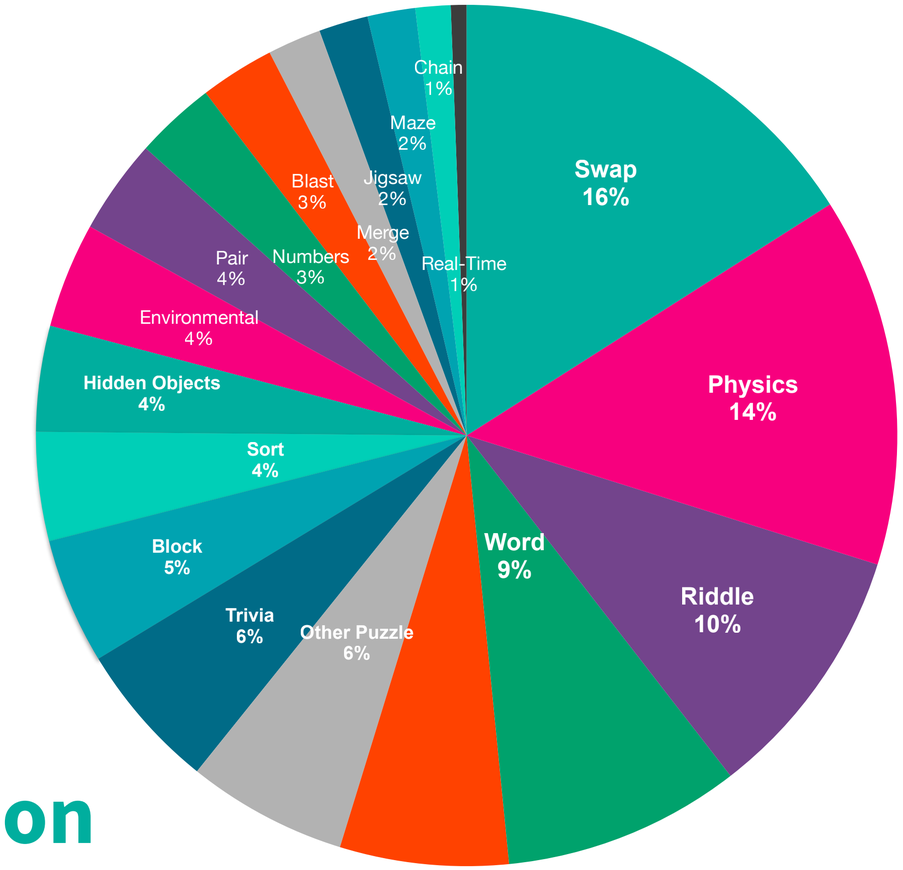
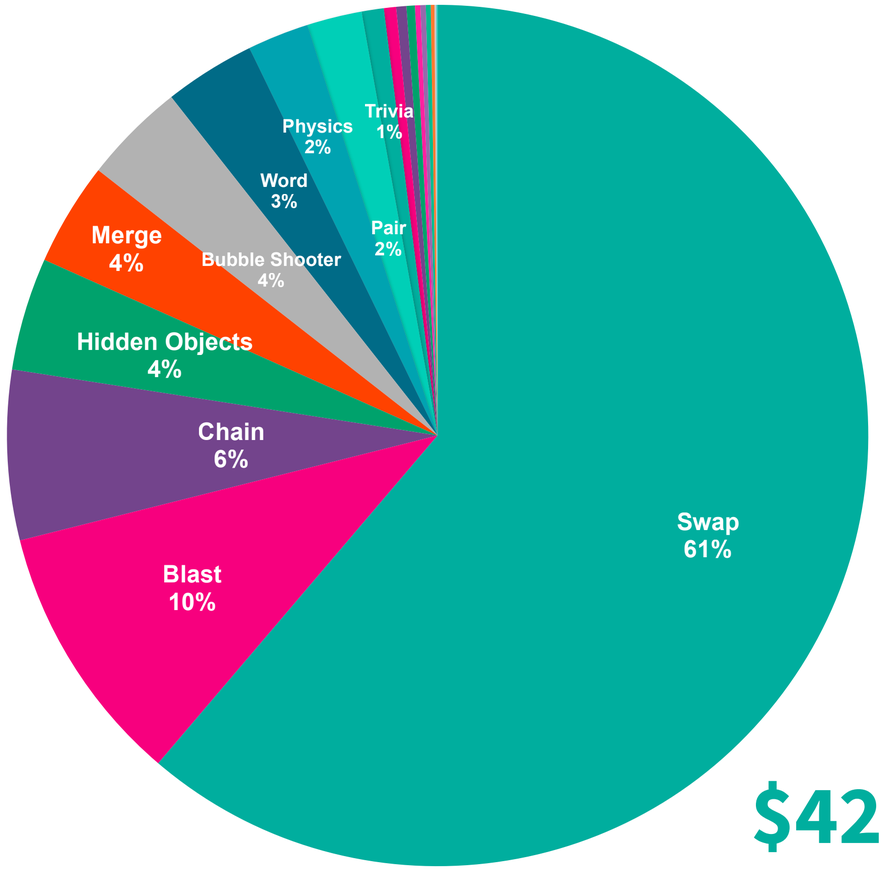
Puzzle Games Market Overview

All Time Worldwide Downloads and Revenue, App Store and Google Play



50 Billion

App Store + Google Play
All Time Worldwide Downloads



$42 Billion

App Store + Google Play
All Time Worldwide Revenue

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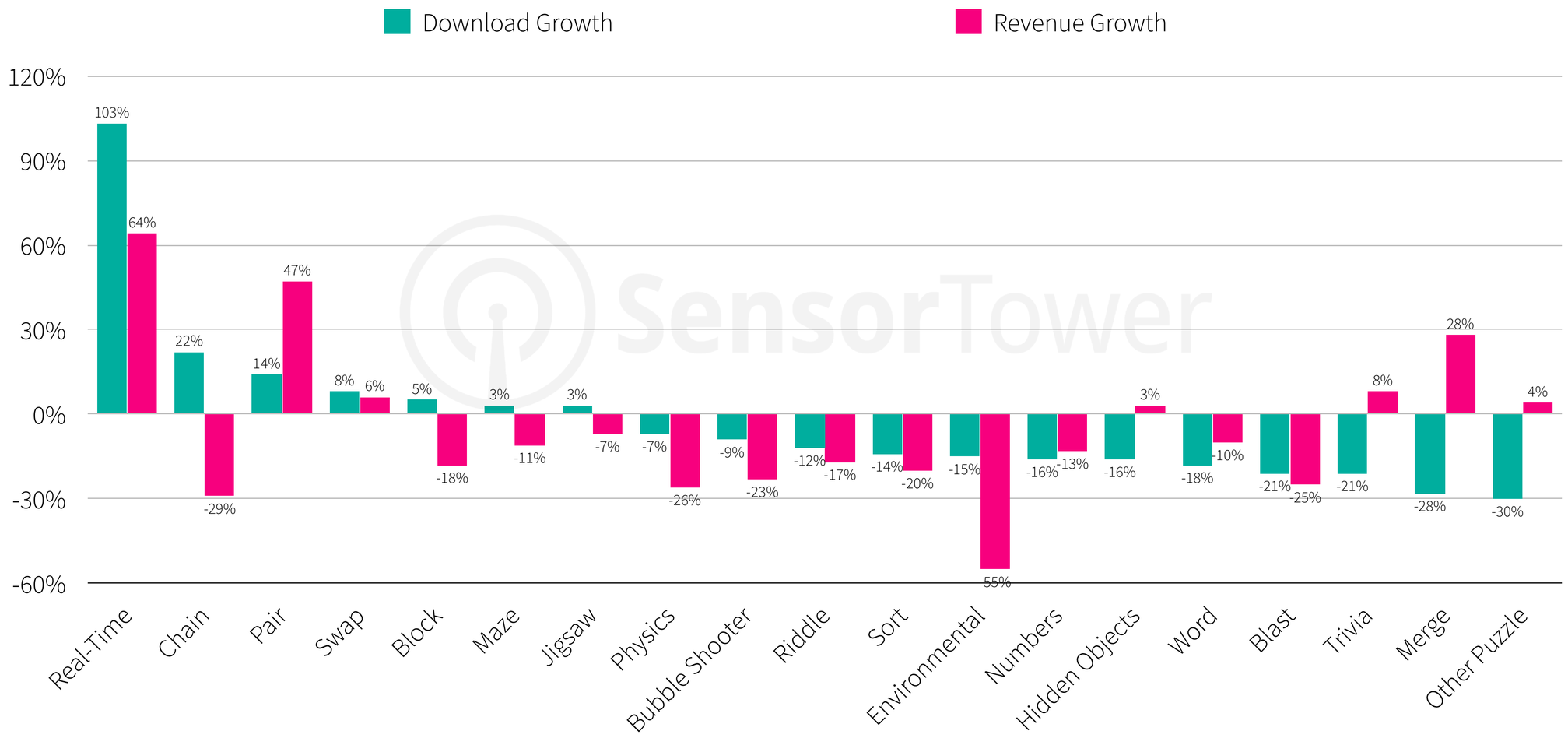
Download and Revenue Change for Puzzle Games - 2022 to 2023

Comparison of download and revenue growth between January through May 2023 vs 2022, App Store and Google Play



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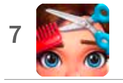
Top 10 Games from Most Downloaded Sub-Genres

By All Time Worldwide Downloads, Jan 1, 2012 - Jun 15, 2023, App Store and Google Play

Swap

1		Candy Crush Saga Activision Blizzard
2		Gardenscapes Playrix
3		Homescapes Playrix
4		Candy Crush Soda Saga Activision Blizzard
5		Fishdom Playrix
6		Farm Heroes Saga Activision Blizzard
7		Project Makeover AppLovin Corp
8		Matchington Mansion AppLovin Corp
9		My Home - Design Dreams AppLovin Corp
10		Candy Crush Jelly Saga Activision Blizzard

Physics

1		Angry Birds 2 Rovio Entertainment
2		Happy Glass AppLovin Corp
3		Angry Birds Classic Rovio Entertainment
4		Rescue Cut - Rope Puzzle ITI
5		Cut the Rope ZeptoLab UK
6		Love Balls AppLovin Corp
7		Angry Birds Rio Rovio Entertainment
8		Pull the Pin Take-Two Interactive
9		Where's My Water? 2 Modern Times Group
10		Mr Bullet - Spy Puzzles AppLovin Corp

Riddle

1		Brain Out: Can you pass it? EYEWIND
2		Brain Test: Tricky Puzzles Unico Studio
3		Save The Girl AppLovin Corp
4		Emoji Puzzle! SUPERSONIC STUDIOS
5		DOP 2: Delete One Part SayGames
6		Thief Puzzle: to pass a level Tapnation
7		DOP: Draw One Part SayGames
8		Papers Grade Please! AppLovin Corp
9		Comics Bob SayGames
10		DOP 4: Draw One Part SayGames

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Top 10 Games from Highest Revenue Sub-Genres

By All Time Worldwide Revenue, Jan 1, 2012 - Jun 15, 2023, App Store and Google Play

Swap

1		Candy Crush Saga Activision Blizzard
2		Gardenscapes Playrix
3		Homescapes Playrix
4		Candy Crush Soda Saga Activision Blizzard
5		Fishdom Playrix
6		Royal Match Dream Games
7		Farm Heroes Saga Activision Blizzard
8		LINE ポコポコ Mansion NAVER Corp.
9		开心消消乐® Happy Elements 乐元素
10		Matchington Mansion AppLovin Corp

Blast

1		Toon Blast Take-Two Interactive
2		Toy Blast Take-Two Interactive
3		Pet Rescue Saga Activision Blizzard
4		Lily’s Garden - Design & Relax Tactile Games ApS
5		Angry Birds Dream Blast Rovio Entertainment
6		LINE ポコパン NAVER Corp.
7		Property Brothers Home Design Stillfront Group
8		Blossom Blast Saga Activision Blizzard
9		Angry Birds Blast Rovio Entertainment
10		LINE ポコパンタウン NAVER Corp.

Chain

1		LINE： ディズニー ツムツム NAVER Corp.
2		妖怪ウォッチ ぷにぷに Level-5
3		Two Dots: Brain Puzzle Games Take-Two Interactive
4		프렌즈팝 Kakao Corp. STUDIOS
5		Jelly Splash: Fun Puzzle Game Playtika
6		欅のキセキ/日向のアユミ enish
7		Simon's Cat - Crunch Time Tactile Games ApS
8		Crazy Kitchen: Match 3 Puzzles Take-Two Interactive
9		Diamond Diaries Saga Activision Blizzard
10		五等分の花嫁 enish

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Top 10 Puzzle Games Integrate Meta Features and Diverse Monetization Strategies

By All Time Worldwide Revenue, App Store and Google Play

Data Source: Sensor Tower - Store Intelligence - App Overview

	Game	Sub-Genre	Meta Feaure	Ads	Currency Bundle	Live Ops	Starter Pack	Loot Box	Season Pass	Ad Removal
	Candy Crush Saga	Swap	Levels, Social Clans	✔	✔	✔	✔	✔	✔	✘
	Gardenscapes	Swap	Decoration / Renovation, Levels, Narrative Stories , Social Clans	✔	✔	✔	✔	✔	✔	✘
	Homescapes	Swap	Decoration / Renovation, Levels, Social Clans, Narrative Stories	✔	✔	✔	✔	✔	✔	✘
	Candy Crush Soda Saga	Swap	Levels, Social Clans	✔	✔	✔	✔	✔	✔	✘
	LINE：ディズニー ツムツム	Chain	Levels, Character Collection	✘	✔	✔	✘	✔	✘	✘
	Fishdom	Swap	Decoration / Renovation, Levels, Social Clans	✔	✔	✔	✔	✔	✔	✘
	Toon Blast	Blast	Levels, Social Clans	✔	✔	✔	✔	✔	✔	✘
	Toy Blast	Blast	Levels, Social Clans	✔	✔	✔	✔	✔	✘	✘
	Farm Heroes Saga	Swap	Levels, Social Clans	✔	✔	✔	✘	✔	✔	✘
	Royal Match	Swap	Decoration / Renovation, Levels, Social Clans	✘	✔	✔	✔	✔	✔	✘

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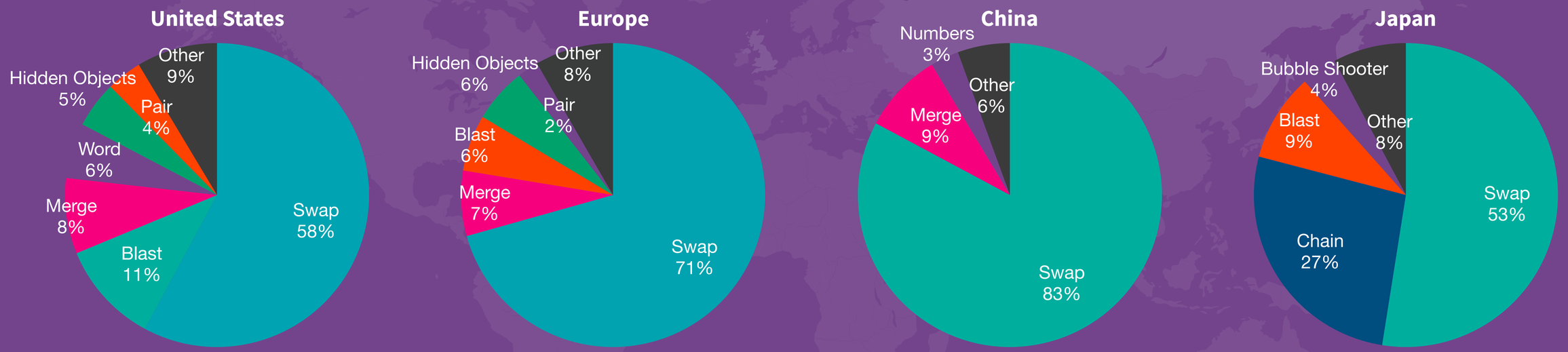
2022 Revenue Breakdown by Country/Region

Revenue Share of Puzzle Games by Country/Region in 2022



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Trends of Physics, Merge, Pair, Block and Sort Puzzle from Q1 2022 to Q1 2023

Pair is the only selected sub-genre that showed significant growth in both downloads and revenue. Downloads in Pair were primarily driven by the Casual product model, but the revenue saw an increase led by Hybridcasual. In Q1 2022, Hybridcasual revenue was only $7M, accounting for 14.8% of Pair's total revenue. However, by Q1 2023, revenue reached $40M, making up 58.7% of Pair's total.

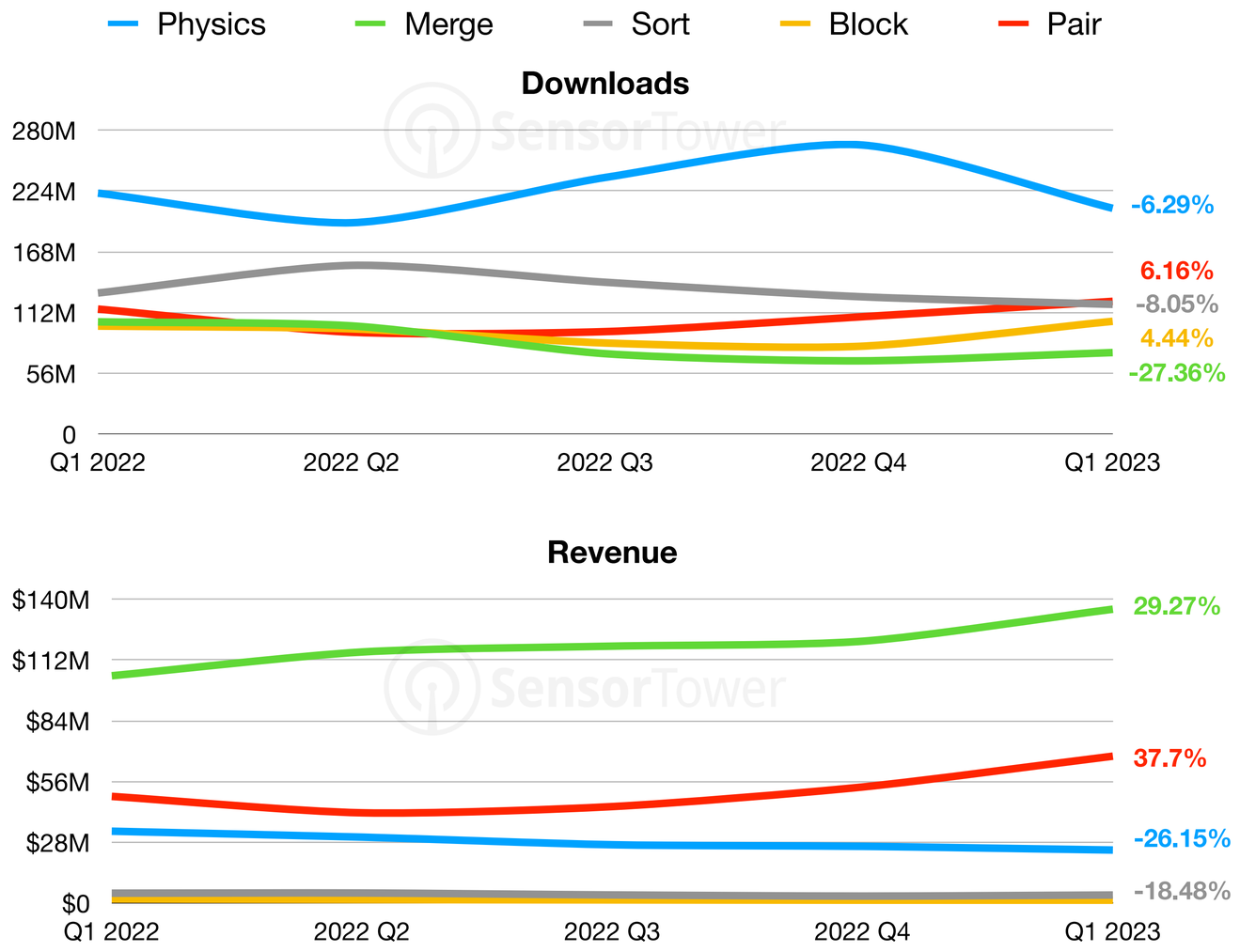
Merge experienced a shift in downloads, with Hypercasual contributions decreasing from 59.4% in Q1 2022 to only 31.8% in Q1 2023. Despite a slight decline in downloads, Casual continued to generate steady revenue through consistent operation and enriching Meta features.

Similarly, Physics also saw a decline in downloads, primarily influenced by the decrease in Hypercasual's contribution, while revenue was mainly driven by Casual.

Sort went through a similar transformation in downloads and revenue due to shifts in the product model. Downloads were led by Hypercasual, while revenue was driven by Casual.

As for Block, downloads were dominated by Casual, showing a steady increase. However, revenue experienced a decline, indicating a potential need for more diversified IAP.

Worldwide Quarterly Downloads and Revenue,
App Store and Google Play



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The Casual Product Model Dominates the Puzzle Game Market while Hybridcasual Shows Remarkable Revenue Growth

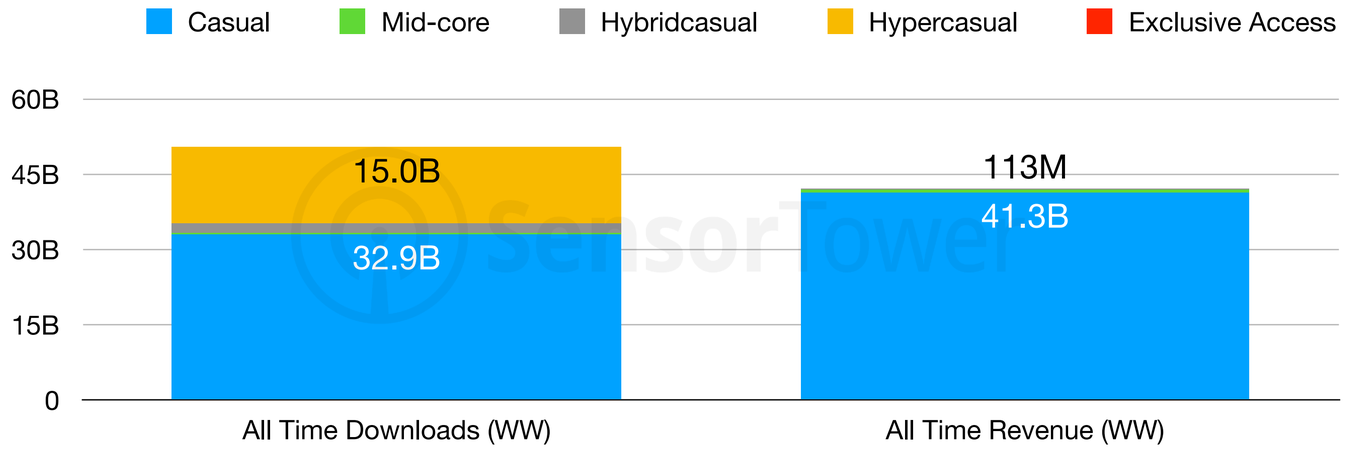
When comparing downloads and revenue from January to May 2023 to that of 2022, the Casual product model exhibited a modest decrease across both.

Despite attracting fewer new users, the monetization strategies in Hypercasual games are currently undergoing changes. In addition to in-app advertising as its main monetization stream, the introduction of in-app purchases has played a crucial role in driving revenue growth and retaining existing players.

The Hybridcasual product model experienced the a remarkable surge in both downloads and revenue. In comparison to the same period in 2022, revenue rose by an impressive 430%.

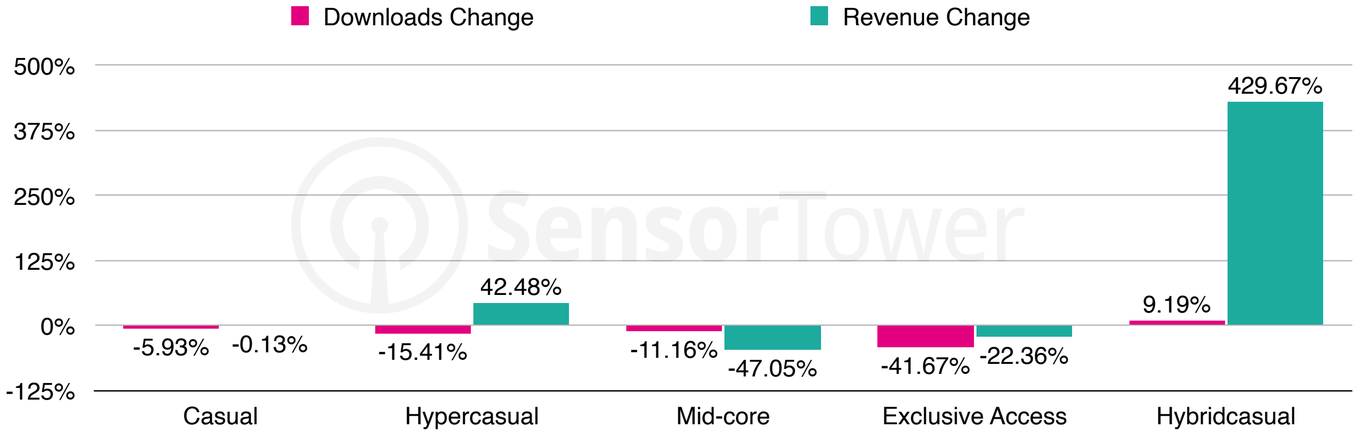
Market Share by Product Model

All Time Worldwide Revenue, Jan 1, 2012 - Jun 15, 2023, App Store and Google Play



Download and Revenue Change by Product Model

Jan - May 2022 vs Jan - May 2023, Worldwide



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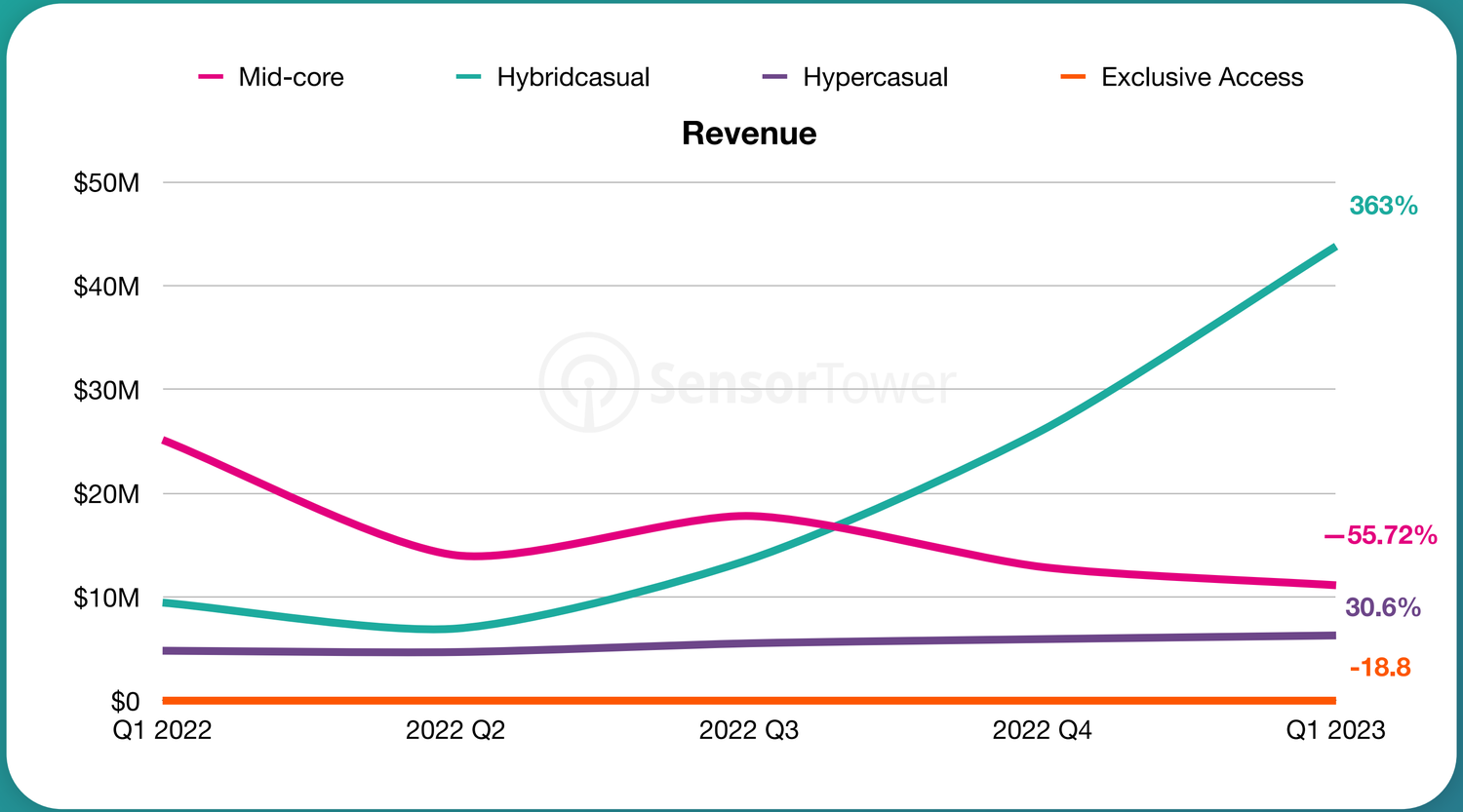
The Rise of Hybridcasual in Puzzle Games

Worldwide Quarterly Downloads and Revenue, App Store and Google Play

Revenue Trends of Product Models from Q1 2022 to Q1 2023



Top 10 Hybridcasual Puzzle Games in terms of worldwide revenue from Q1 2022 to Q1 2023

1		Triple Match 3D Miniclip.com	Pair
2		Match 3D AppLovin Corp	Pair
3		Collect Em All! Clear the Dots voodoo	Chain
4		Match Tile 3D AppLovin Corp	Pair
5		Brain Test: Tricky Puzzles Unico Studio	Riddle
6		Tilescapes: Zen Tile Matching Shanghai Yanxi Network Technology	Pair
7		Love Paradise - Merge Makeover Rosecrab	Merge
8		Pocket World 3D Mansion Minimonster Game	Other Puzzle
9		Goods Match 3D - Triple Master PokerCity 波克城市	Pair
10		Match 3D Master Matching Games Kidult Lovin	Pair

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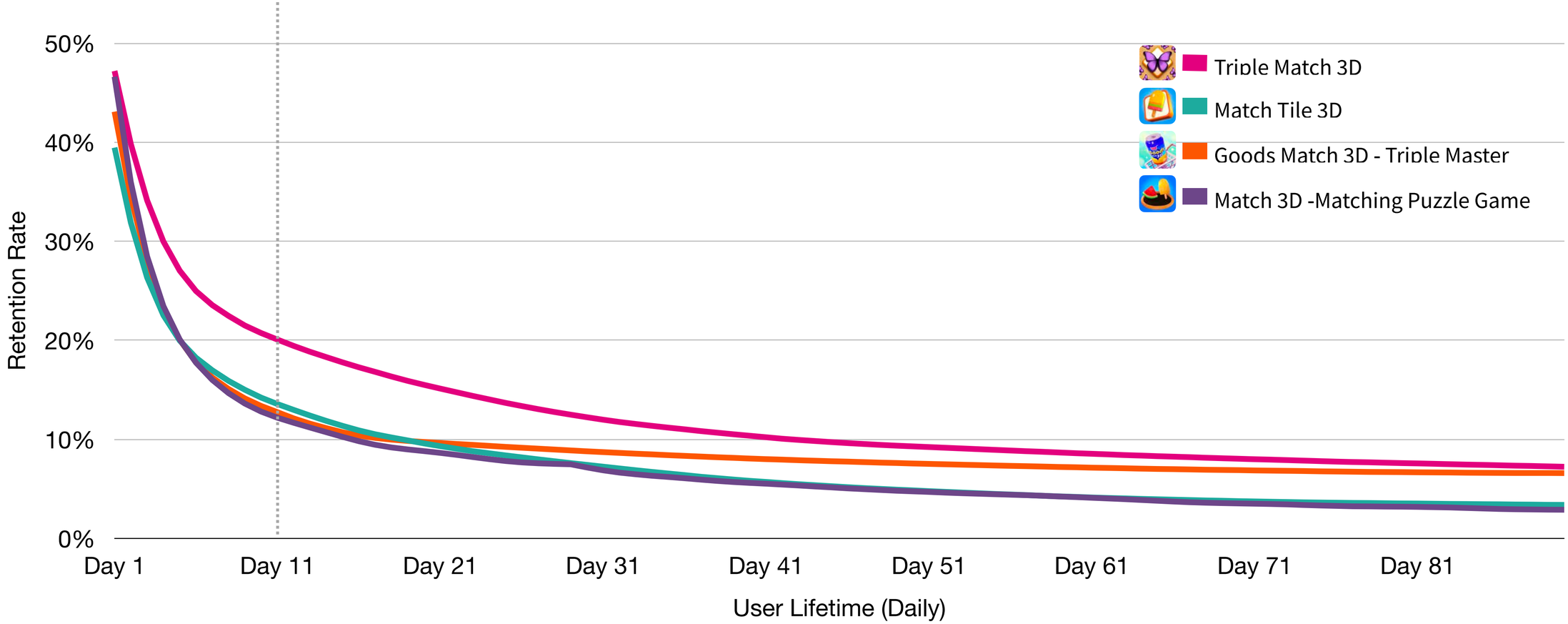
Hybridcasual Pair Puzzle User Retention Performance

Data Source: Sensor Tower - Usage Intelligence



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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.

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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.

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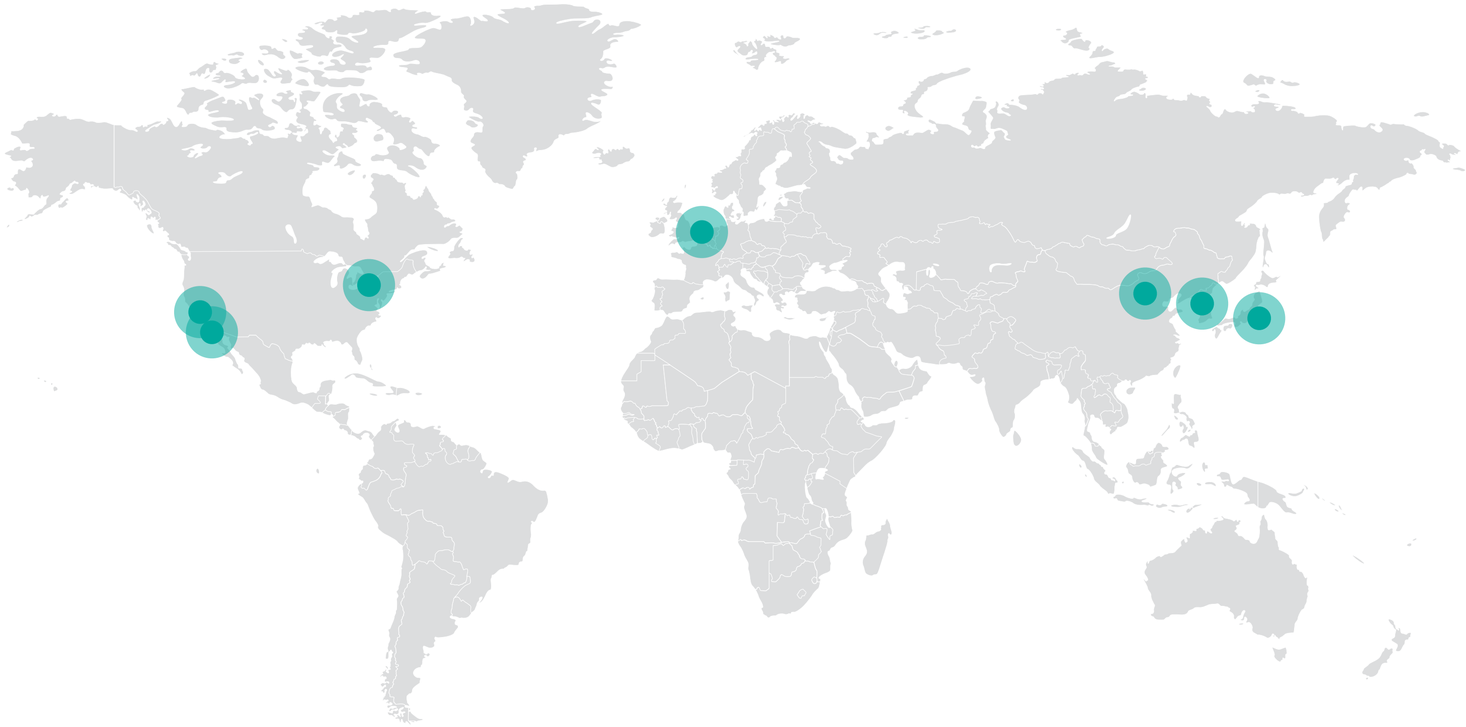

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About Sensor Tower

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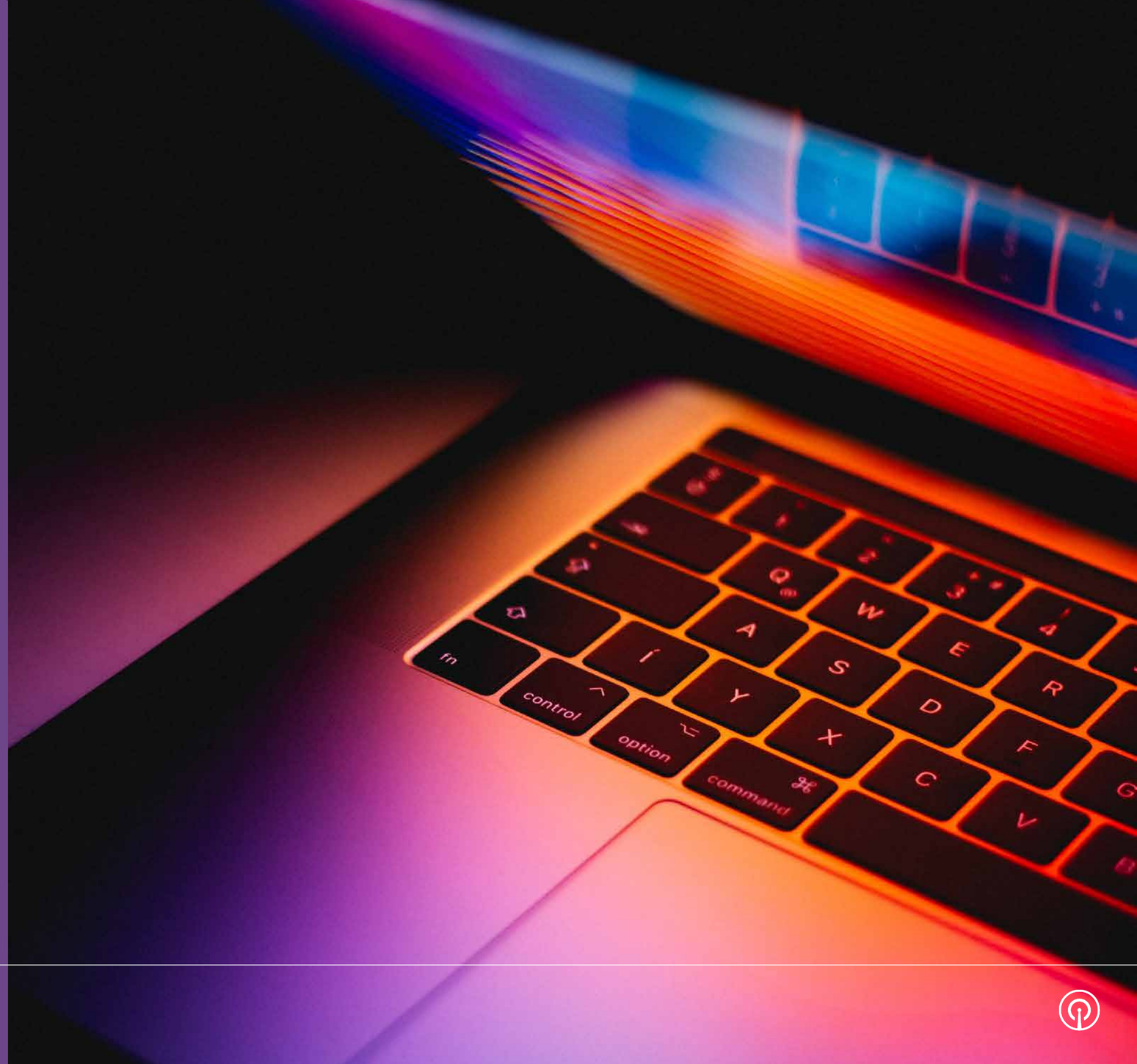

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