

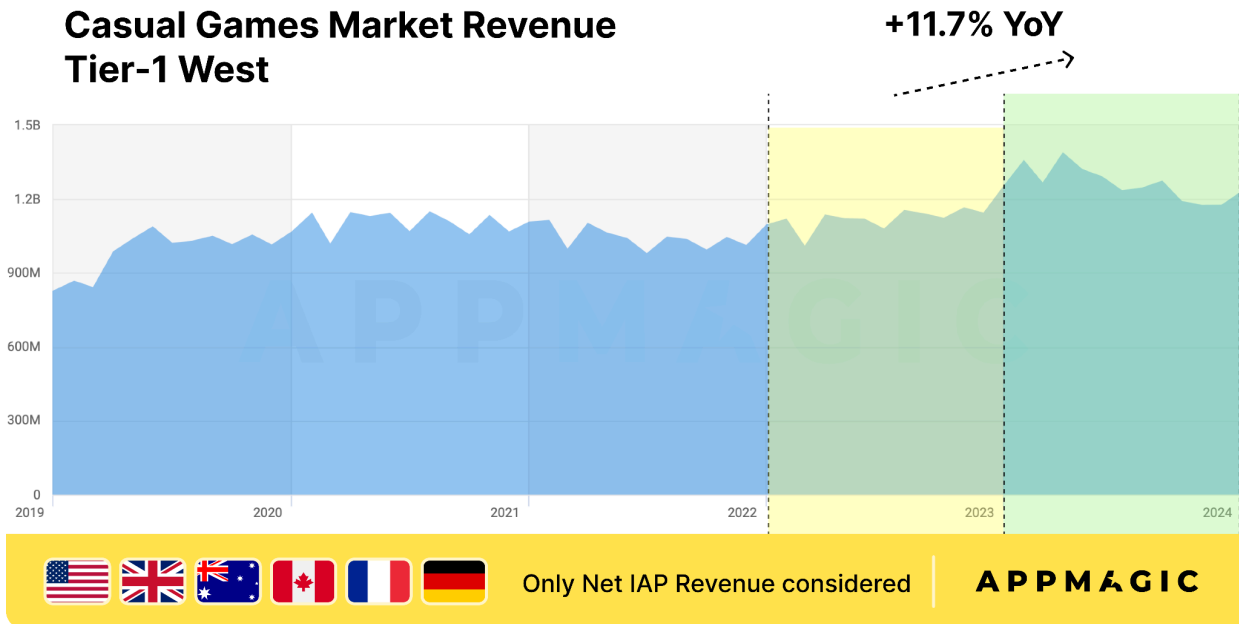


Casual Games Report 2024: Following 5 Routes to Success

For the casual mobile games market, 2024 was the year when strategies shaped by the challenges of the past three years began to take form. As some doors closed—like easier funding from investors and cheaper user acquisition—developers opened others, shifting their focus to boosting LTV through LiveOps and deeper monetization, and not just in casual games but hypercasual and hybridcasual genres as well.

As a result, the Tier-1 West casual gaming market grew by 11.7% YoY, while downloads increased by a modest 4.1%. Today, the casual market stands at \$15.2B in IAP revenue alone—a vast ocean filled with opportunities to seize. But where to go and how to choose your niche for 2025?

Casual Games Market Revenue Tier-1 West



Market Segment Comparison: [Casual Games Dashboard](#)

To explore the matter, we're diving into the five casual genres that reflect key market trends, showcase different growth paths, and highlight the challenges of breaking into various niches. By doing this, we can better understand how to approach these spaces in 2025. That is why, for this research, we've focused on **Match-3 with Complex Meta**, **Merge-2 with Complex Meta**, **Match 3D**, **Sort Puzzle**, and **Casual Casino**.

To produce the report, we use the data on casual games from Tier-1 West countries, which include the US, the UK, Australia, Canada, France, and Germany. We chose these markets because they offer the most useful insights for Western developers, who are, quite certainly, most likely to be reading this.

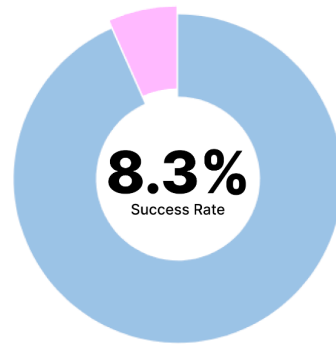
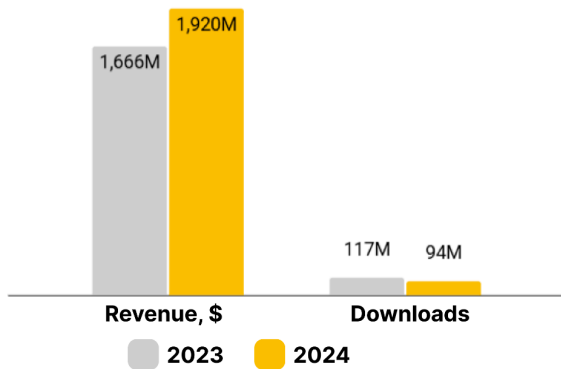
These are but a few points we were able to cover and draw insights into as a result:

- What the hottest genre in the industry is right now—and how to spot the next one up;
- Why market structure can matter more than whether or not a genre is growing;
- How UA challenges are reshaping monetization strategies of casual games;
- Why developers need to think about long-term retention and LiveOps earlier on than ever.

Without further ado, let's dive into the first genre!

Match-3 with Complex Meta: The Royal Genre

Match-3 With Complex Meta



● New apps (60) ● Successful apps (5)

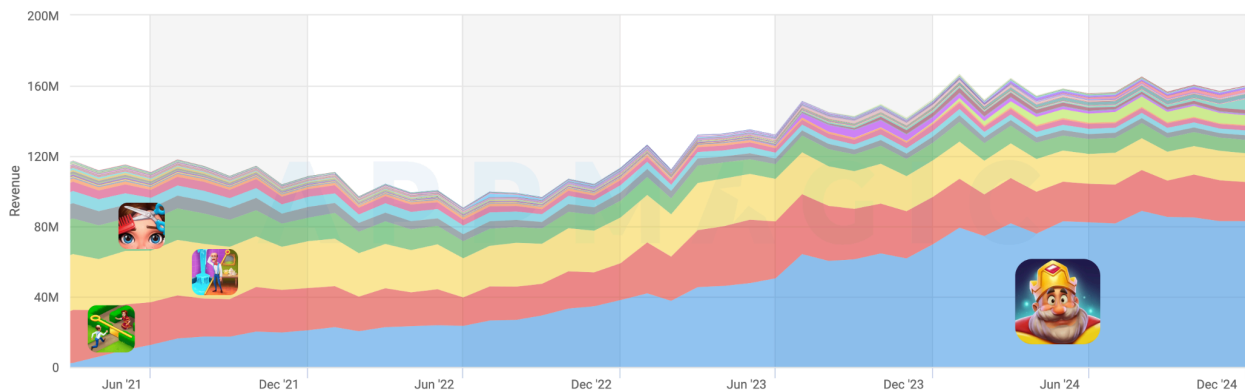


We define success as reaching \$50K in monthly revenue at least once in 2024

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Market Segment Comparison: [Match-3 with Meta Dashboard](#)

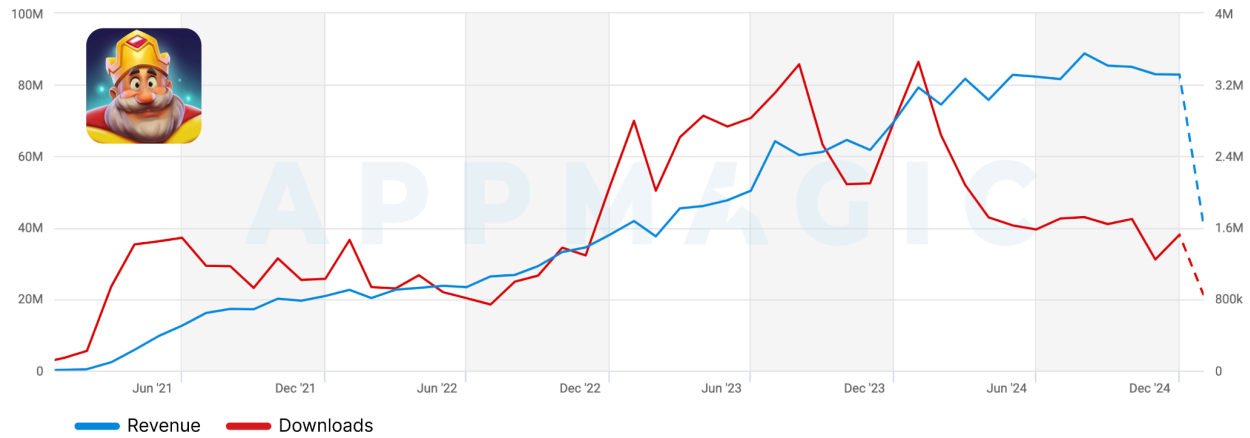
In 2024, Match-3 games experienced a 21% YoY decline in downloads but delivered an impressive 13% growth in revenue. A big part of this growth boils down to [Royal Match](#)—an absolute market leader responsible for just over half (51%) of the genre’s revenue share in Tier-1 Western countries. If we exclude *Royal Match*, however, the picture isn’t as positive—the market actually declined by 8% YoY in revenue.



Market Segment: [Match-3 with Meta](#)

For *Royal Match*, 2024 was the year when audience scaling gave way to focusing on ways to improve monetization and LiveOps. This is also reflected in the revenue per download (RpD) ratio, which grew quite steadily throughout the year and reached an impressive \$55 in December.

Previous market leaders—[Gardenscapes](#), [Homescapes](#), [Project Makeover](#), and other long-standing titles—went through a similar transformation some time ago. Now, it's the market's unicorn's turn to mature and evolve.



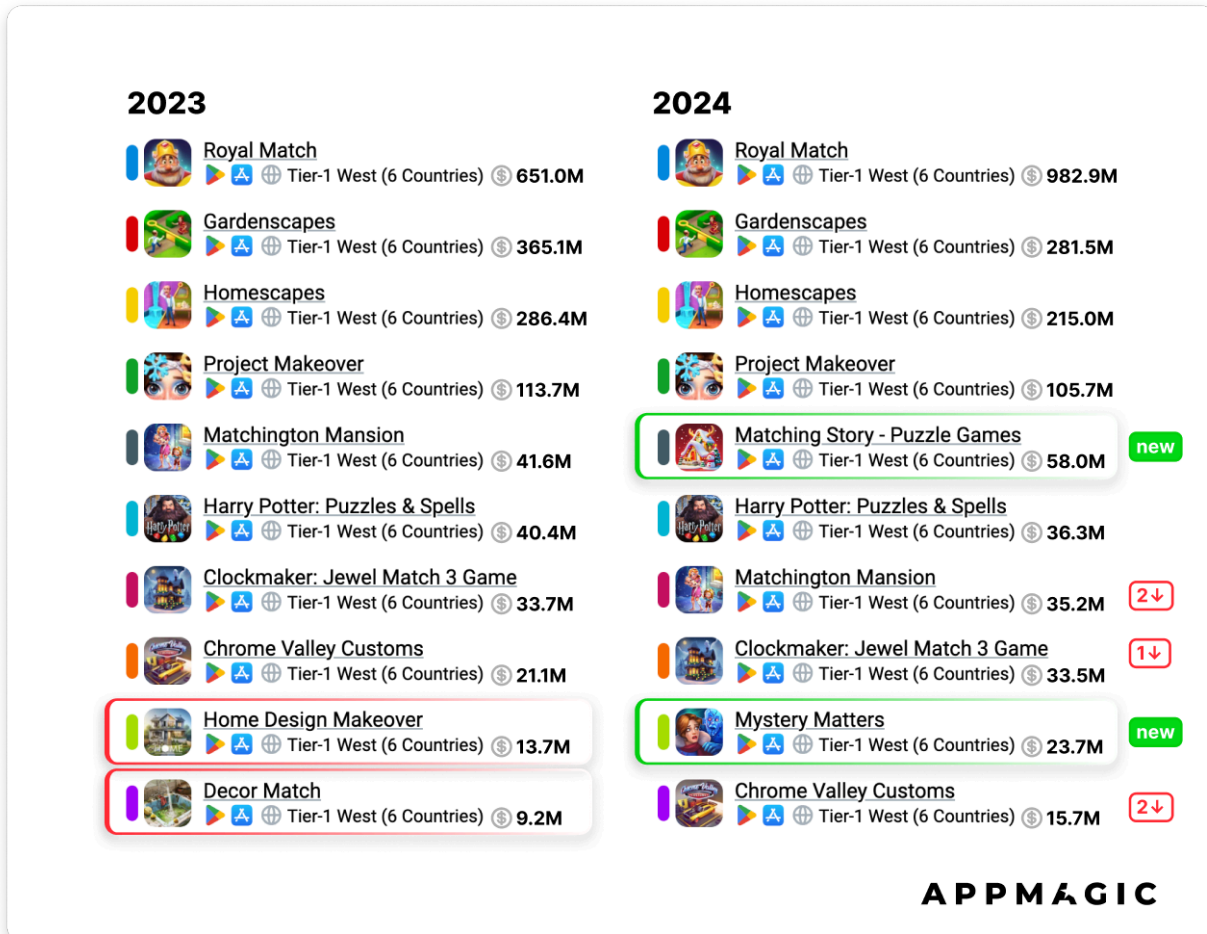
Royal Match: [Revenue and Downloads Dashboard](#)

This pattern of revenue growth outpacing that of the downloads will actually appear many times throughout this report. While it might seem repetitive, don't worry—behind those numbers lie many success stories worth analyzing, and that's exactly what we'll do!

In the case of *Royal Match*, that shift was successful because of the following changes:

- **Personalized LiveOps grid:** The Live Ops grid in the game is divided into two categories—calendar-based and trigger-based, for active players who have completed all events in the main grid.
- **Older features reworked:** The previously permanent album feature was replaced by limited-time events, such as the [Royal Collection](#) and [Summer Collection](#), which proved to have a positive effect on player engagement due to their time-limited nature.
- **New social features:** Events like the [Archery Arena](#) leaderboard and the [Team Tournament](#) were added for players to compete in teams.
- **Innovative event integration:** For example, Dream Games adopted co-op events from the Casual Casino genre. Starting with [Dragon Nest](#) earlier in the year, they refined the concept and wrapped up 2024 with the successful [Train Journey](#) event in December.

In 2024, the genre’s top 10 remained largely stable, with minimal changes compared to 2023. The top 4 spots—*Royal Match*, *Gardenscapes*, *Homescapes*, and *Project Makeover*—held firm, continuing to dominate the market and securing the majority of Tier-1 West revenue for yet another year.



Match-3 with Meta: [Top 10 Games](#)

When it comes to newcomers, there were only two new entries into the top league: [Matching Story - Puzzle Games](#) by Vertex and [Mystery Matters](#) by Playrix, which replaced [Home Design Makeover](#) and [Decor Match](#) in the rankings. Both were launched in 2023, showing that breaking into the top tier of the Match-3 genre takes time, even for the best-executed titles.

On the one hand, consistency at the top highlights the ongoing dominance of established leaders, leaving little room for new players to carve out significant space in the genre. On the other hand, the 8.3% success rate of new titles demonstrates that

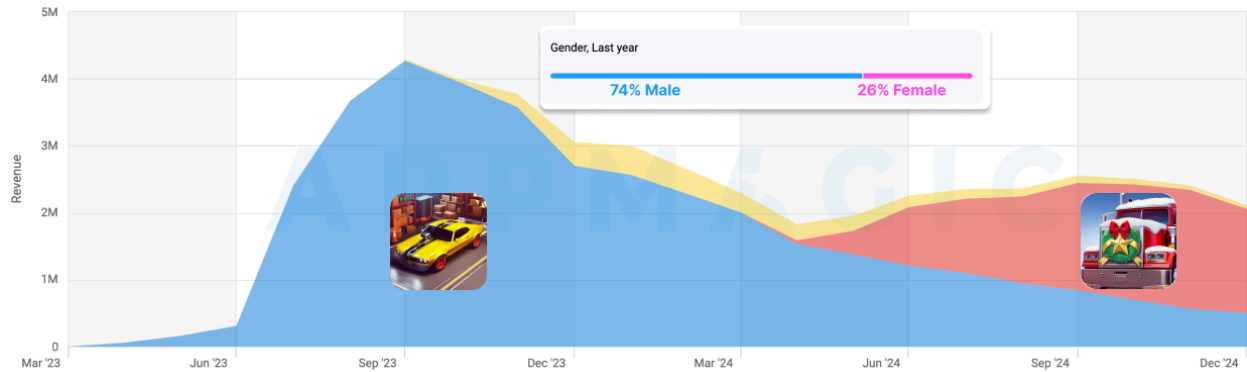
there is still some wiggle room to build successful projects, even if they don't break into the top 10 right away.

Out of 60 new titles launched in Tier-1 West, five managed to reach the \$50k/month success benchmark we set for this report:

- [Truck Star](#) by Century Games: A male-first Match-3 game that makes great use of the trucker aesthetic, targeting a newly found niche in the market.
- [Hollywood Crush: Match3 Puzzle](#) by YOTTA GAMES: A fashion-focused game similar to *Project Makeover*, but with a stronger emphasis on red carpet themes and celebrity glamor.
- [Ellen's Garden Restoration](#) by Storm8 Studios: This game leverages the personal brand of the well-known comedian and TV host Ellen DeGeneres;
- [Christmas Match: Home Design](#) by Narcade: Launched at the end of the year, the game leans into its Christmas theme with visuals and ASO fully tailored to holiday and New Year searches.
- [Roomscapes](#) by Playrix: A new title from one of the genre leaders that underwent its test drive in 2024. While traffic acquisition has currently been suspended, we might see a return in 2025.

A unique and easy-to-grasp concept is one way to capture the audience's initial attention and stand out in an oversaturated market. However, building on that first success is a far more complex and critical task. In this regard, Century Games' *Truck Star* stands out as the prime example: launched in May 2024, the game exceeded \$10M in IAP revenue by the end of the year. A huge part of this success can be attributed to its engaging and well-structured LiveOps, which has been very rich and immersive from the very start.

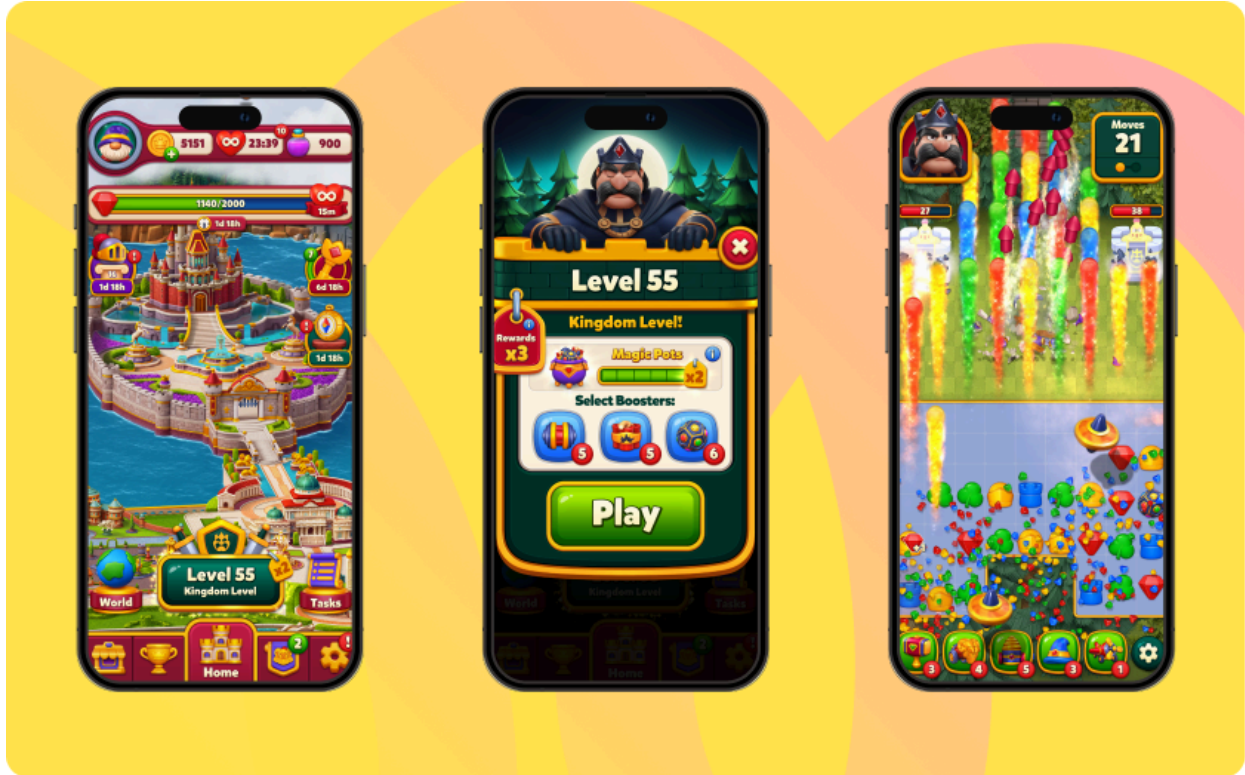
Truck Star follows the formula established by [Chrome Valley Customs](#), which holds the 10th position on the market. The game has essentially created a new subgenre of Match-3 games specifically targeting the male audience. We explored the success of both games in [our previous reports](#), discussing the emergence of this new subgenre.



Male-first Match-3 games: [More in the H1 2024 report.](#)

Wait, there's actually a fourth success story from last year. This one was far more predictable—some might even say inevitable. You've probably guessed it already: [Royal Kingdom](#), the second game from Dream Games, the creators of the hugely successful *Royal Match*.

Soft-launched back in April 2023, *Royal Kingdom* went global in late November 2024. During that time, the game generated over \$23M in revenue, reaching an impressive \$5M per month by December. It's an incredible achievement—but is it enough for one of the most successful studios in gaming history? Surprisingly, the [trajectory is quite similar](#) to *Royal Match*, which also reached its \$5M–6M monthly revenue range about the same time after going global.



Royal Kingdom by Dream Games

However, it's still too early to predict the long-term success of *Royal Kingdom*. While *Royal Match* stood out with numerous USPs compared to other market leaders at the time, some might argue that *Royal Kingdom* doesn't differentiate enough—from *Royal Match* itself. Here are a few reasons why it might not become the next market leader:

- The biggest gameplay change in *Royal Kingdom* is the introduction of PvE levels, which show up every five levels. Beyond that, however, most of the gameplay feels very similar to what *Royal Match* already offers.
- The game's LiveOps are mostly just reskinned versions of *Royal Match* events.
- The meta gameplay also lacks any significant novelty apart from a slight thematic change that doesn't fundamentally alter the player experience.

Want to be the first to learn *Royal Kingdom*'s event schedule and its best practices?

Reach out to us and get your free demo!

This similarity means that *Royal Kingdom* might struggle to attract a new audience and risks becoming more of an alternative option for *Royal Match* players. With a parallel

LiveOps schedule and reskinned events, players are likely to feel torn between the two titles—and it wouldn't be surprising if many decide to stick with *Royal Match*.

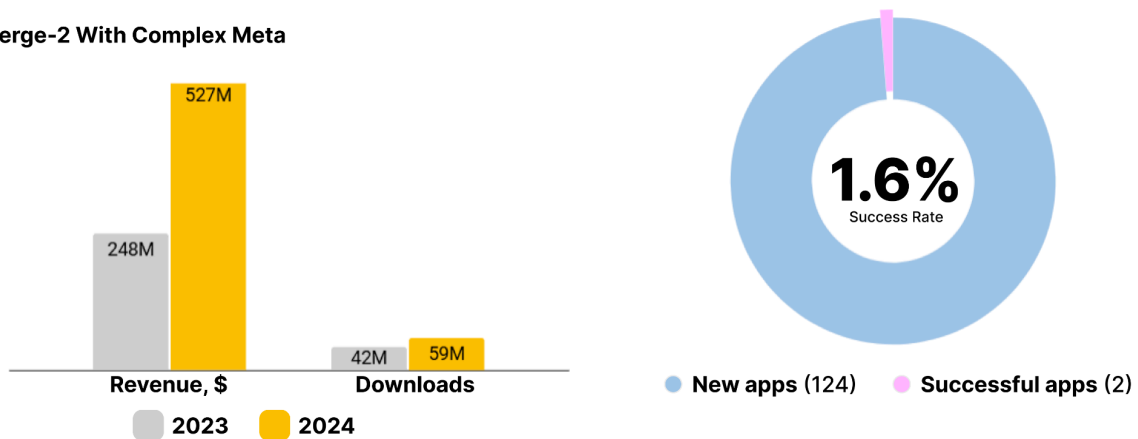
That said, *Royal Kingdom* is a fantastic game, and if *Royal Match* weren't already out there, we'd probably be a lot more optimistic. The game has some big shoes to fill, and we're excited to see what Dream Games has in store for 2025!

Match-3 With Complex Meta: Key Thoughts

The success rate of 11.7% in Tier-1 West might sound impressive, but don't let this number deceive you. It comes down to just four games, two of which were created by some of the most prominent studios in mobile gaming: Dream Games and Century Games. While there's still room for creative ideas and fresh approaches in the genre, long-term success will also depend on bigger budgets for LiveOps, UA, and top-tier talent to compete with the best.

Merge-2 with Complex Meta: Advancing Monetization and Perfecting LiveOps

Merge-2 With Complex Meta



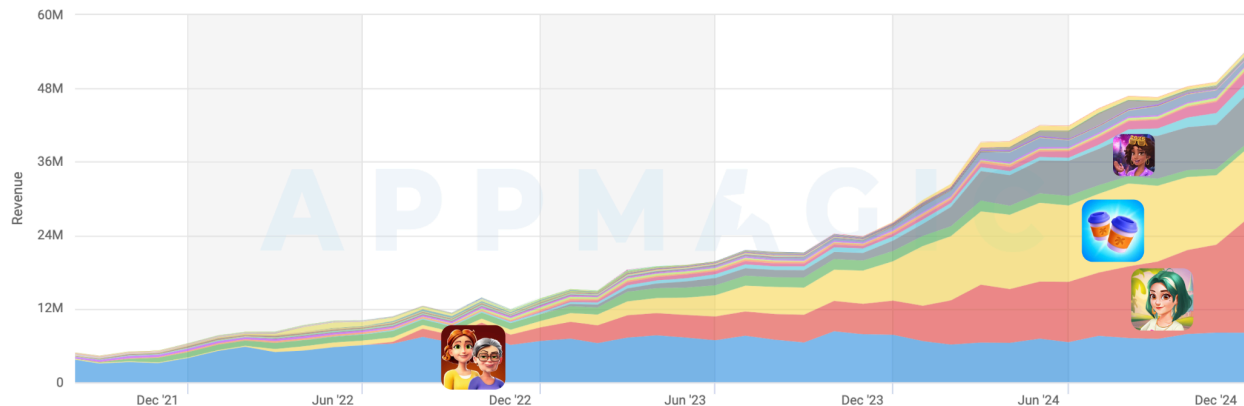
We define success as reaching \$50K in monthly revenue at least once in 2024

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Market Segment Comparison: [Merge-2 with Meta Dashboard](#)

In 2024, the Merge-2 with Meta genre experienced a significant 43% YoY increase in downloads, rising to 60 million from 42 million in 2023. Even more impressive was its revenue growth, which soared by 106% YoY, doubling from \$250M in 2023 to \$515M in 2024.

- The growth in the Merge-2 with Meta genre was fueled by market leaders adopting new monetization and LiveOps strategies. However, unlike Match-3 with Complex Meta, the market structure here is quite different, with no single game capturing half of the genre’s revenue. Before 2023, this was different, and the majority of revenue was generated by one single leader: [Merge Mansion](#). Today, Metacore’s hit shares its success with several other long-standing titles from the genre, including [Travel Town](#), [Gossip Harbor](#), and [Seaside Escape](#).

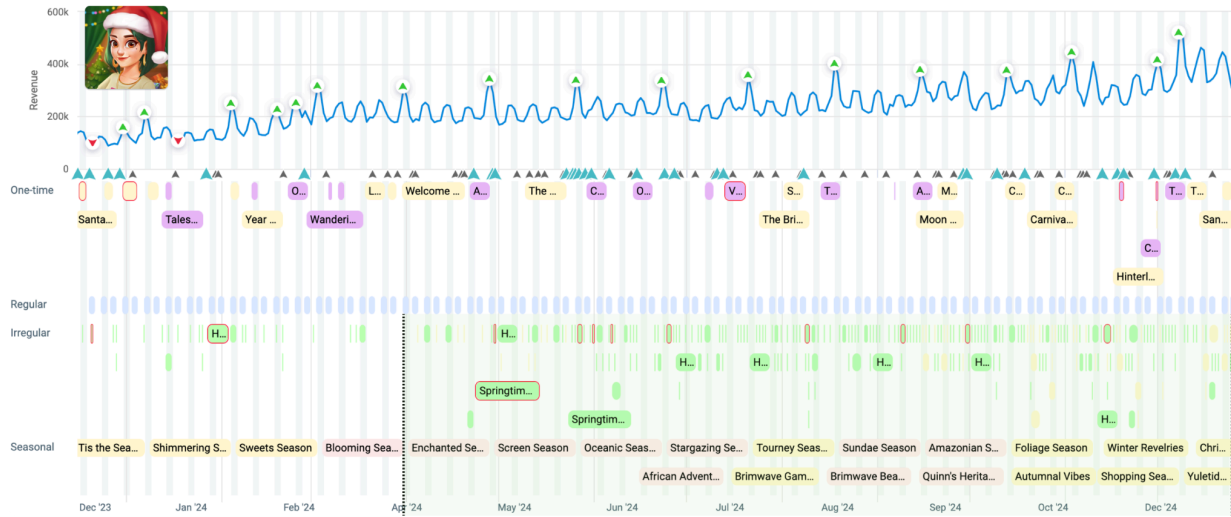


Market Segment: [Merge-2 with Meta](#)

This collective growth can largely be attributed to the strong focus on LiveOps. In 2024, developers not only got faster at copying and testing successful ideas from within the genre but also actively adopted best practices from other genres, such as Casual Casino and Match-3.

For example, *Gossip Harbor* and *Seaside Escape* were clearly inspired by [Coin Master](#), leading to the introduction of customizable and growth offers shortly after they debuted in Moon Active’s flagship title. At the same time, the developers of *Gossip Harbor* likely kept an eye on *Merge Mansion* updates, testing similar features—such as the [Secret Supply](#) event with its gacha machine mechanic.

To see how much work has gone into *Gossip Harbor*, just take a look at its event schedule. In our LiveOps & Updates Calendar, you’ll notice a clear increase in both the variety and frequency of events, especially the Seasonal and the Irregular. The same picture can be seen across all the top games in the genre today!













Gossip Harbor's events in AppMagic's [LiveOps & Updates Calendar](#)

The competition is heating up, making it even harder for new titles to break through. To succeed, newcomers will need not just a polished core but also a well-structured event schedule right from the start.











That environment is reflected in the quite dynamic Top 10 ranking, where almost every app changed its position over the year:

- *Travel Town* claimed the top spot;
- *Gossip Harbor* surpassed *Merge Mansion* to secure the second place;
- *Seaside Escape* has already outperformed *Merge Mansion* in Worldwide revenue, and *Tier-1 West* is likely to follow.

2023

| | | | |
|------------------------------------------------------------------------------------|--------------------------------|---------------------------|----------|
|  | Merge Mansion | Tier-1 West (6 Countries) | \$ 87.3M |
|  | Gossip Harbor@: Merge & Story | Tier-1 West (6 Countries) | \$ 48.8M |
|  | Travel Town - Merge Adventure | Tier-1 West (6 Countries) | \$ 44.3M |
|  | Love & Pies - Merge Mystery | Tier-1 West (6 Countries) | \$ 18.7M |
|  | Seaside Escape@: Merge & Story | Tier-1 West (6 Countries) | \$ 11.9M |
|  | Merge Hotel Empire: Design | Tier-1 West (6 Countries) | \$ 6.9M |
|  | Merge Cooking:Theme Restaurant | Tier-1 West (6 Countries) | \$ 5.5M |
|  | Merge Inn - Cafe Merge Game | Tier-1 West (6 Countries) | \$ 3.3M |
|  | Merge Studio: Fashion Makeover | Tier-1 West (6 Countries) | \$ 2.8M |
|  | Merge Mayor - Match Puzzle | Tier-1 West (6 Countries) | \$ 2.3M |

2024

| | | | | |
|------------------------------------------------------------------------------------|--------------------------------|---------------------------|-----------|-----|
|  | Travel Town - Merge Adventure | Tier-1 West (6 Countries) | \$ 143.2M | 2↑ |
|  | Gossip Harbor@: Merge & Story | Tier-1 West (6 Countries) | \$ 131.8M | |
|  | Merge Mansion | Tier-1 West (6 Countries) | \$ 85.2M | 2↓ |
|  | Seaside Escape@: Merge & Story | Tier-1 West (6 Countries) | \$ 67.7M | 1↑ |
|  | Love & Pies - Merge Mystery | Tier-1 West (6 Countries) | \$ 16.6M | 1↓ |
|  | Adventure Island Merge | Tier-1 West (6 Countries) | \$ 13.9M | new |
|  | Merge Cooking:Theme Restaurant | Tier-1 West (6 Countries) | \$ 13.8M | |
|  | Merge Hotel Empire: Design | Tier-1 West (6 Countries) | \$ 12.2M | 2↓ |
|  | Taylor's Secret: Merge Story | Tier-1 West (6 Countries) | \$ 7.2M | new |
|  | Road Trip: Royal merge games | Tier-1 West (6 Countries) | \$ 7.1M | new |

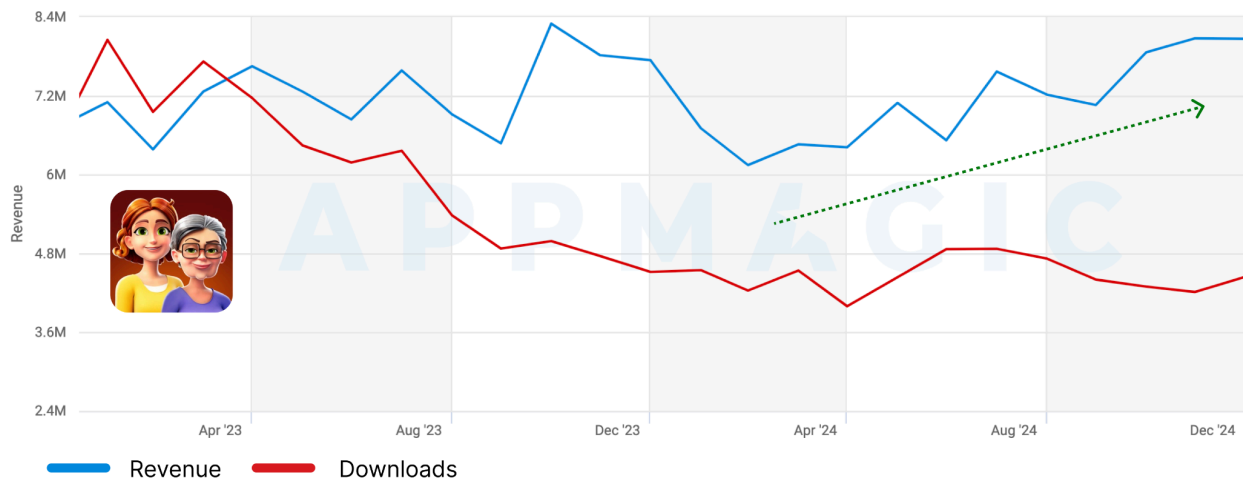
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Merge-2 with Meta: [Top 10 Games](#)

Two games outdoing the mighty *Merge Mansion* mark a new era for the genre, which had been dominated by Metacore's title for over three years!

However, developers didn't take the loss lightly. By the end of 2024, *Merge Mansion* began testing best practices from other casual games: for example, they introduced an Album event that, from the start, made use of the industry's best tips and tricks. All this led to a new all-time high revenue worldwide that December. Will the game manage to

snatch the number-one spot once again? Looking forward to finding out!



Merge Mansion: [Revenue and Downloads Dashboard](#)

While the top five games in the ranking are locked in fierce competition, the rest of the Top 10 is equally dynamic, with two games maintaining their positions and three being replaced by fresh entries:

- [Adventure Island Merge](#) by FlyBird: With a setting similar to *Travel Town*, the game uses misleading creatives to lower CPI, which helped it climb to the 6th spot.
- [Taylor's Secret: Merge Story](#) by Merge Story: Its traffic acquisition has stopped, and if this continues, the game is likely to drop out of the Top 10;
- [Road Trip: Royal merge games](#) by Vizor: The game features a meta that is unique for the genre, built around an expedition mechanic that was already mastered in [Klondike Adventures](#)—Vizor's flagship title.



Merge Prison: Hidden Puzzle and Merge Adventure: Merging Game

As for the success rate, only 2 out of 64 titles released this year made it past our \$50K/month success benchmark:

- [Merge Prison: Hidden Puzzle](#) by the Hong Kong-based publisher Blue Ultra Game: The game's female prison setting is similar to the popular Netflix series *Orange Is The New Black*, while its meta gameplay resembles an Escape Room puzzle, creating a fresh thematic blend for the genre.
- [Merge Adventure: Merging Game](#) by the Cyprus-based Green Pixel. The game is a blend of adventure and merge genres. Just like in the above-mentioned Vizor's *Road Trip*, the game implements meta from Playrix's *Scapes* titles.

In fact, having two successful games is a positive sign for the genre! Throughout all of 2023, there were none—you can read more about this in [our previous report](#). This low success rate suggests that, despite the genre's growth, competition is too tough for any new well-grossing games to appear regularly.

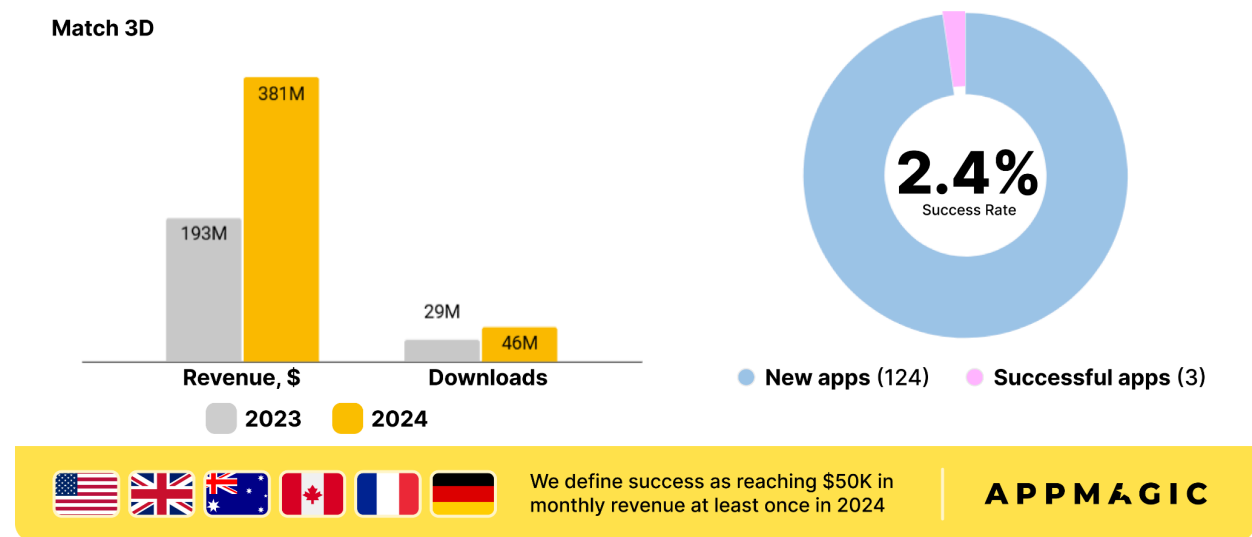
Merge-2 with Complex Meta: Key Takeaways

Although the market grew significantly in 2024, it hasn't exactly become any more welcoming to the new kids on the block. On the contrary, breaking into the genre in

2025 will require new titles to experiment with meta and focus heavily on their LiveOps grid early on—at a stage where developers would typically be polishing concepts, refining core gameplay, and building early meta. The upside? The Merge-2 top league has become a hub for the best practices in the casual market, so you know where to look for inspiration!

We have five Merge-2 games in our LiveOps & Updates Calendar, where you can find everything about their events, including their evolution and their impact on performance. You can read more about the tool in [this short article](#).

Match 3D: Transitioning to Casual

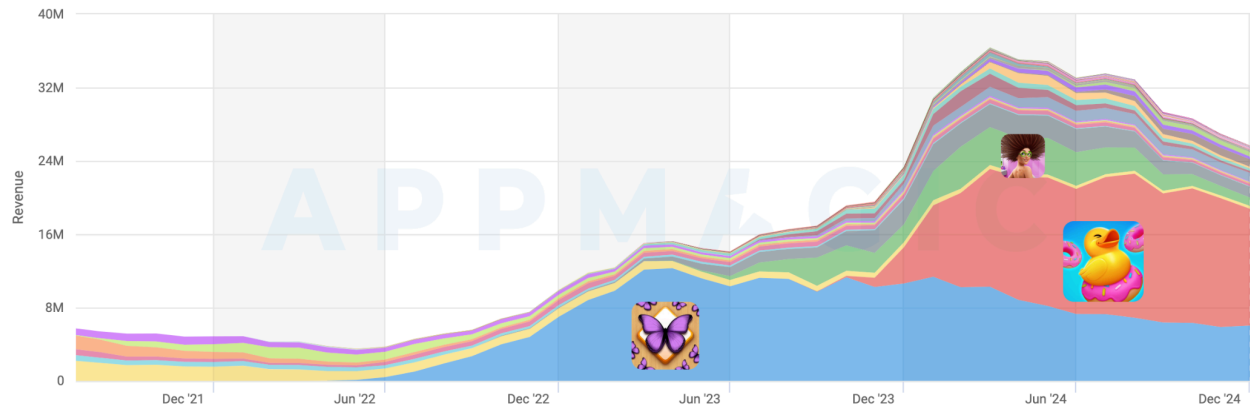


Market Segment Comparison: [Match 3D Dashboard](#)

Match 3D saw one of the most impressive yearly growth rates, nearly doubling its revenue with a 97% YoY increase. Once again, revenue growth outpaced that of the downloads, mirroring the trends we saw in the previous two genres. However, unlike Match-3 and Merge-2, the growth in Match 3D was driven by new titles rather than long-established games simply boosting their revenue.

In fact, the only game that made solid IAP revenue and dominated the genre for 18 months straight, [Triple Match 3D](#) by Boombox Games, saw its Tier-1 revenue decline from \$10.6M per month in Dec 2023 to \$6M in Dec 2024, gradually losing ground over

the year.























Market Segment: [Match 3D with Meta](#)

By March 2024, a new leader had seized its place—[Match Factory!](#) by Peak Games, which generated \$158M in yearly revenue and is now responsible for a tremendous 42% of the genre's total revenue.

Part of the reason behind the success of [Match Factory!](#) is how the game expands the original Triple Match 3D formula. It introduces meta-features and social mechanics—like clans, leaderboards, and goal-setting—that enhance long-term retention while the core gameplay remains quite hypercasual. There's something else that's hard to ignore—and even harder to put into words: the unique touch that Peak Games brings to its titles. It's reflected in the top-notch visual quality and that distinct feel, don't you agree?

While this success has shaken up the genre's Top 10, it wasn't the only noteworthy change. Four new titles entered the rankings, pushing out older games and marking a significant shift in the genre's competitive landscape.

| 2023 | 2024 |
|-------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  Triple Match 3D Tier-1 West (6 Countries) \$ 128.8M |  Match Factory! Tier-1 West (6 Countries) \$ 158.3M 5↑ |
|  Happy Match Cafe™ Tier-1 West (6 Countries) \$ 13.0M |  Triple Match 3D Tier-1 West (6 Countries) \$ 94.8M 1↓ |
|  Tile Match 3D : Triple Match Tier-1 West (6 Countries) \$ 12.9M |  Happy Match Cafe™ Tier-1 West (6 Countries) \$ 34.0M 1↓ |
|  Match 3D Tier-1 West (6 Countries) \$ 8.6M |  Tile Match 3D : Triple Match Tier-1 West (6 Countries) \$ 24.6M 1↓ |
|  Match Triple 3D: Matching Tile Tier-1 West (6 Countries) \$ 5.3M |  Joy Match 3D Tier-1 West (6 Countries) \$ 12.1M new |
|  Match Factory! Tier-1 West (6 Countries) \$ 5.2M |  Match Frenzy™ - ASMR Tycoon Tier-1 West (6 Countries) \$ 9.0M 4↑ |
|  Triple Find - Match Triple 3D Tier-1 West (6 Countries) \$ 3.2M |  Match Villa™: Makeup ASMR Tier-1 West (6 Countries) \$ 6.2M new |
|  Find 3D™ - Match 3D Items Tier-1 West (6 Countries) \$ 2.9M |  Triple Find - Match Triple 3D Tier-1 West (6 Countries) \$ 5.6M 1↓ |
|  Tile Master Pro: Triple Match Tier-1 West (6 Countries) \$ 2.8M |  Match Mania 3D - Triple Match Tier-1 West (6 Countries) \$ 4.5M new |
|  Match Frenzy™ - ASMR Tycoon Tier-1 West (6 Countries) \$ 2.3M |  Blitz Busters Tier-1 West (6 Countries) \$ 4.3M new |

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Match 3D: [Top 10 Games](#)

Interestingly, two of the Top 10 titles—[Match Villa: Makeup ASMR](#) and [Match Frenzy - ASMR Tycoon](#)—embrace the viral “gross” aesthetic built around the removal of exaggerated imperfections, like popping pimples or clearing out dirt. It ties perfectly into the ASMR theme and emphasizes the oddly satisfying experience. Plus, it works well for creatives and boosts CTR, which is why this aesthetic is often used across many casual genres!

The same aesthetic appears in one of the three successful titles that surpassed our \$50K benchmark: [Match Rush 3D: ASMR Care](#) by AlphaPlay Games. Among the 2024 launches, it achieved the highest lifetime revenue at \$575K, though its performance declined toward the end of the year to \$30K/month in December.

The other two games to make our success cut are [Match Party - Tile 3D](#) and [Triple Pile 3D](#). However, both started to decline in January 2025 and could follow the path of [Match Rush 3D: ASMR Care](#) if nothing changes—good traction initially, but now stagnating and at risk of fading out.

The most likely reason for such declines is the challenge of retaining the players. This highlights an important point: polished core gameplay and low-cost user acquisition are no longer enough in today's competitive landscape. To succeed, developers need a clear strategy for both short- and long-term player retention right from the start—a lesson we've already learned from the previous genre!

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Match 3D: Key Thoughts

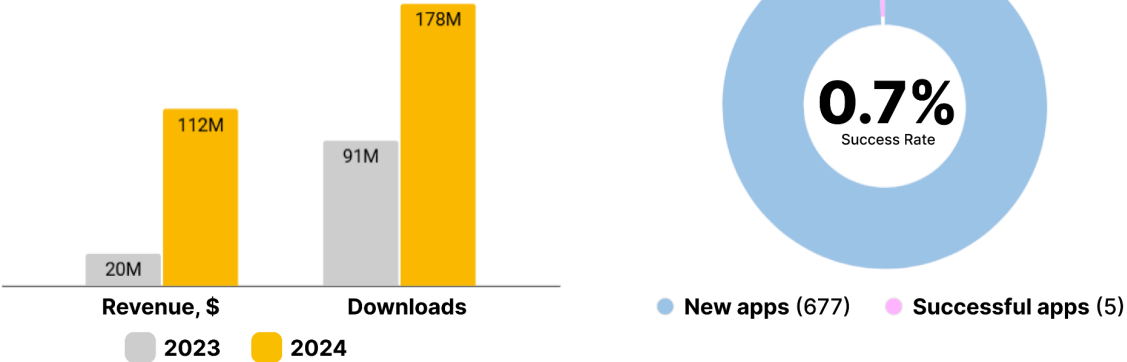
Over time, the genre has transitioned from hypercasual to casual. Initially, a unique and well-designed core was enough to succeed with an ad-based hypercasual model. However, as the genre evolved, developers began incorporating meta-features, experimenting with difficulty curves, and refining their monetization strategies.

Today, many top titles incorporate a simplified *Royal Match*-like meta, Match-3-inspired boosters, and event mechanics borrowed from Casual Casino games. Moreover, developers often experiment with level design and difficulty curves to make the core more engaging in the long run. Overall, Match 3D remains a relevant genre with room for innovation, particularly in enhancing long-term retention and upgrading LiveOps strategies.

However, breaking into the genre is now much tougher than it was a year ago. Wishing you had been part of the first wave? Don't worry—there's always the next emerging genre to explore!

Sort Puzzle: the Hottest Genre of the Year

Sort Puzzles

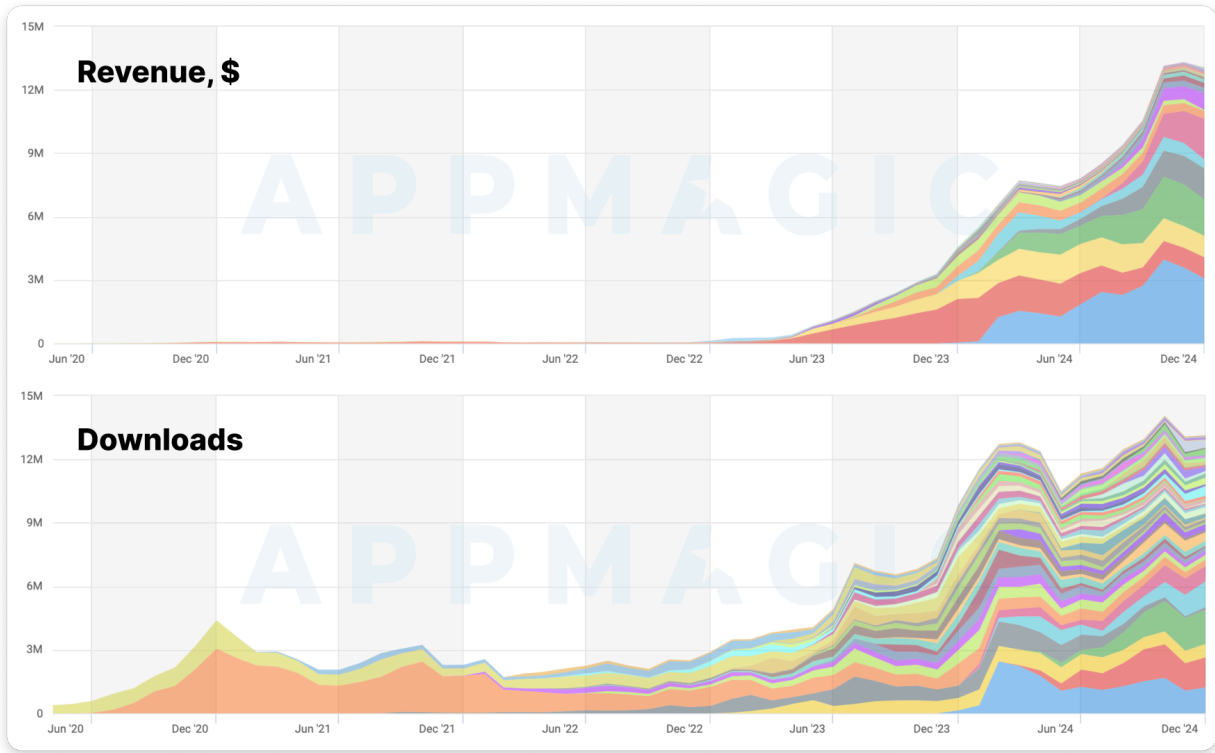


We define success as reaching \$50K in monthly revenue at least once in 2024

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Market Segment Comparison: [Sort Puzzles Dashboard](#)

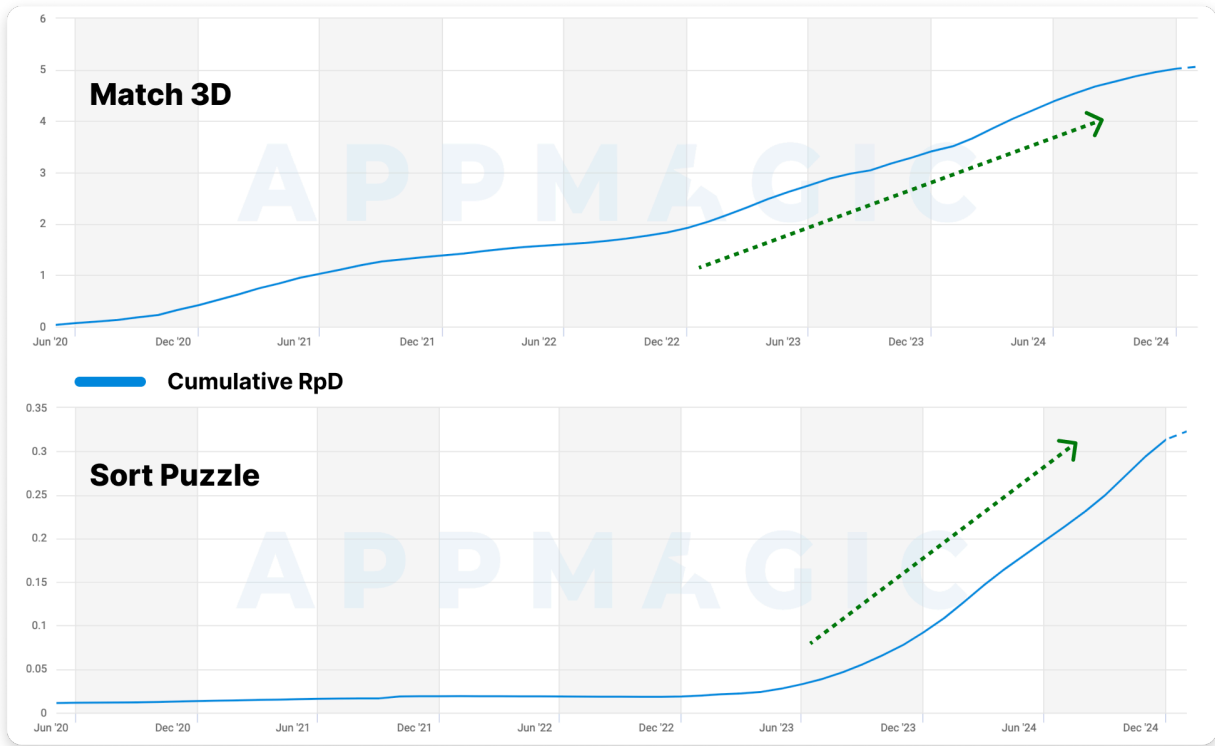
Sort Puzzle is currently one of the fastest-growing genres in terms of revenue. The genre experienced explosive growth in the second half of 2023 and carried that momentum into 2024, achieving an impressive x5.6 YoY revenue increase! Sort Puzzle games were already popular in terms of downloads in Tier-1 West, so their recent success isn't only about new audiences finding the genre: rather, it's about the breakthrough in monetization strategies.



Market Segment: [Sort Puzzles](#)

You wouldn't be wrong to state this resembles the trend we saw in Match 3D—a genre that underwent a similar shift in RpD at the beginning of 2023. Since then, Match 3D has experienced steady growth before slowing down in H2 2024. Meanwhile, Sort Puzzle appears to be at a pivotal point and is still showing no signs of losing this











momentum.













Market Segment Comparison: [Match 3D](#) and [Sort Puzzle](#)

Looking at the top charts, it is clear that the market has been flooded with new titles, bringing a wave of fresh ideas and gameplay twists. Remarkably, 6 of the top 10 games are newcomers, and one of them is the current leader of the genre: [Hexa Sort](#) by Lion Studios with its \$28.5M revenue. The game began scaling in January 2024 and claimed the No.1 spot in just six months, pushing [Block Jam 3D](#) by VOODOO down to second place after its 15 months of leadership!

2023

| | |
|------------------------------------------------------------------------------------|----------------------------------------------------------------------|
|  | Block Jam 3D Tier-1 West (6 Countries) \$ 9.8M |
|  | Goods Sort™ - Sorting Games Tier-1 West (6 Countries) \$ 4.0M |
|  | Triple Master 3D: Goods Sorting Tier-1 West (6 Countries) \$ 1.8M |
|  | Goods Master 3D: Puzzle Games Tier-1 West (6 Countries) \$ 1.6M |
|  | Cake Sort Puzzle 3D Tier-1 West (6 Countries) \$ 0.6M |
|  | Card Shuffle Sort Tier-1 West (6 Countries) \$ 0.5M |
|  | Get Color - Water Sort Puzzle Tier-1 West (6 Countries) \$ 0.3M |
|  | Bus Jam Tier-1 West (6 Countries) \$ 0.2M |
|  | Water Sort Puzzle Tier-1 West (6 Countries) \$ 0.2M |
|  | Cake Sort - Color Puzzle Game Tier-1 West (6 Countries) \$ 0.1M |

2024

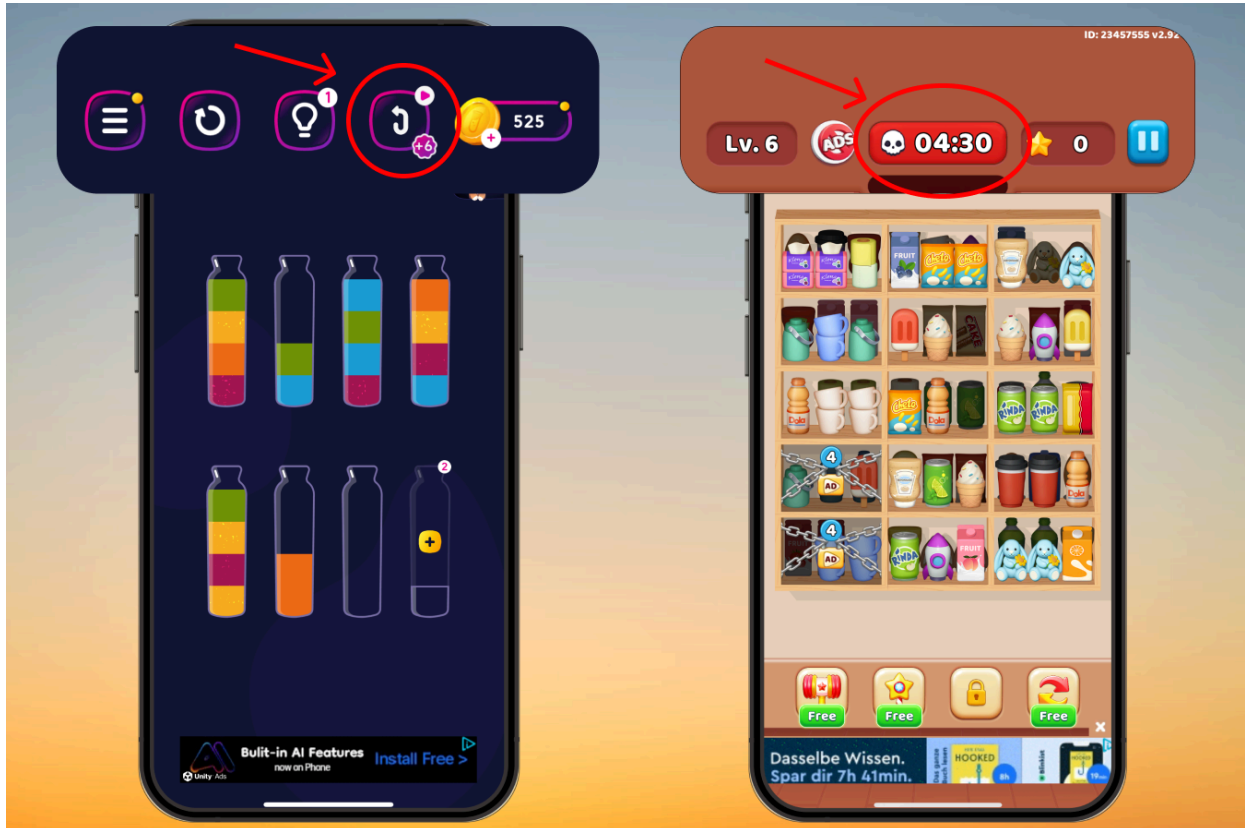
| | | |
|------------------------------------------------------------------------------------|----------------------------------------------------------------------|-----|
|  | Hexa Sort Tier-1 West (6 Countries) \$ 25.5M | new |
|  | Block Jam 3D Tier-1 West (6 Countries) \$ 16.0M | 1↓ |
|  | Goods Sort™ - Sorting Games Tier-1 West (6 Countries) \$ 14.6M | 1↓ |
|  | Seat Away Tier-1 West (6 Countries) \$ 13.6M | new |
|  | Blossom Sort - Flower Games Tier-1 West (6 Countries) \$ 7.2M | new |
|  | Bus Jam Tier-1 West (6 Countries) \$ 6.7M | 2↑ |
|  | Goods Puzzle: Sort Challenge Tier-1 West (6 Countries) \$ 5.4M | new |
|  | Goods Master 3D: Puzzle Games Tier-1 West (6 Countries) \$ 5.3M | 4↓ |
|  | Triple Master 3D: Goods Sorting Tier-1 West (6 Countries) \$ 4.1M | 6↓ |
|  | Magic Sort! Tier-1 West (6 Countries) \$ 2.5M | new |

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Sort Puzzle: [Top 10 Games](#)

Looking at the Top 10, it stands out how much the gameplay and themes of the top-grossing games have evolved. One of the most notable changes is the disappearance of Water Sort Puzzles. Back in 2022, 6 out of 10 games were water puzzles, with three more being simply the reskinned versions of the same gameplay. By 2023, only two of the water puzzles remained, and in 2024, none made it into the Top 10.

The signs of single-theme dominance are still evident in 2024: 4 of the top 10 games in the genre include the word *goods* in their title. These revolve around sorting household items and food, a natural fit for the genre fundamentally based on organizing and categorizing stuff!



[Get Color - Water Sort Puzzle](#) by Zephyr Games and [Goods Puzzle: Sort Challenge](#) by Falcon Games

Yet the difference goes beyond just shifting to a more relatable setting—there are also significant tweaks to the gameplay as such:

- **Time pressure over puzzle-solving:** In goods Sort Puzzles, the challenge often comes from time constraints rather than finding the correct solution or undoing mistakes. Monetizing time pressure is a proven strategy that is commonly seen in Hidden Object and Time Management games.
- **Set of boosters:** Goods-sorting games frequently incorporate Match-3-style boosters that help players deal with challenges faster. These not only enhance gameplay but also deepen monetization.
- **Simplistic decoration meta:** Many goods-sorting games include a basic decoration meta heavily inspired by *Royal Match* that works well on goal-setting and, therefore, retention.

At the same time, mechanics inherited from Water Puzzles, like unlocking new sorting spaces and the heavy use of ads, bring Goods Puzzles closer to hypercasual territory. Again, this reminds us of Match 3D, where reworked difficulty, refined monetization, and

a simplified decoration meta are commonly found in new titles. And there were plenty of them last year!

Don't miss the next big Sort Puzzle title! Stay ahead of trends and discover emerging niches with AppMagic's Market Segment and Top Apps tools.

Contact us now for your free demo!

In 2024, 227 Sort Puzzle games were launched, with six of them surpassing our \$50K/month benchmark. While a 2.6% success rate might seem low, it's important to look beyond just IAP revenue metrics. As noted earlier, the genre still heavily relies on ad revenue, which isn't reflected in these figures.

For instance, [Nut Sort: Color Sorting Game](#) by Zephyr Mobile hasn't yet reached \$50K per month in IAP revenue. However, with over 9.6M installs, its IAA revenue must be exceeding that benchmark by far!

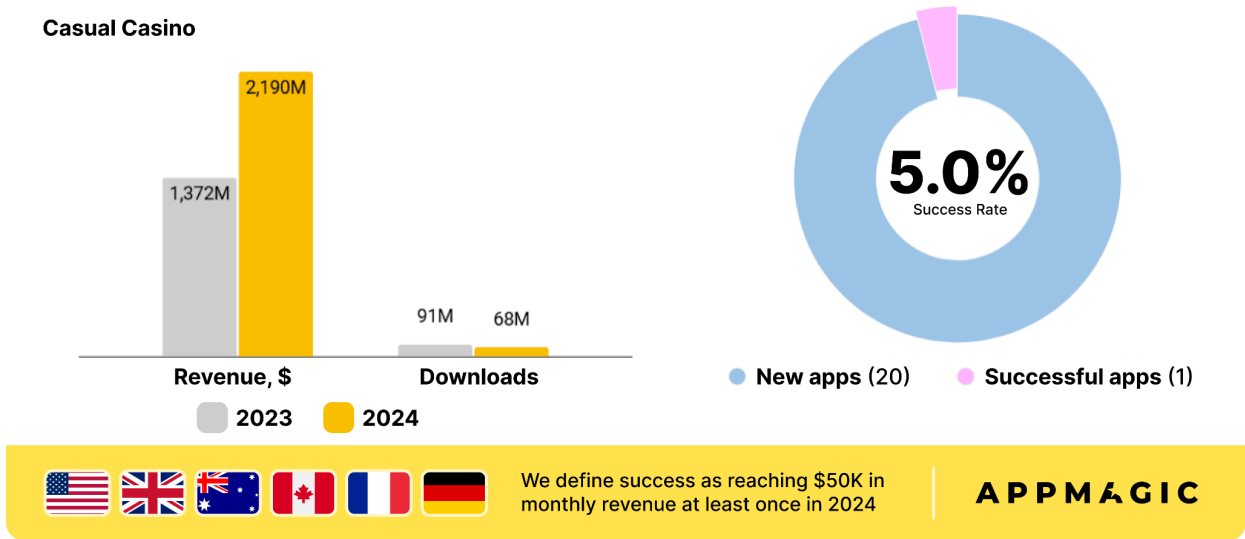
As for the games that formally surpass \$50K/month in IAP revenue, their heavy reliance on inspiration from competitors stands out. For instance, [Magic Sort!](#) and [Royal Sort](#) borrow extensively from *Royal Match*, not just in UI/UX and art style but also in core and meta. Others, like [Hexa Master 3D - Color Sort](#), experiment with their art style to build on the success of the *Hexa Sort* formula.

This trend shows just how vital it is to keep your finger on the pulse of market dynamics and draw inspiration from leading titles—not just within your genre but across the entire casual gaming space!

Sort Puzzle: Key Thoughts

Just like Match 3D, the genre is transitioning from hypercasual to casual by incorporating Match-3-inspired elements such as boosters and simplified meta. However, it's still in the early stages of what seems to be a similar journey, making it a genre worth having a closer look at in 2025!

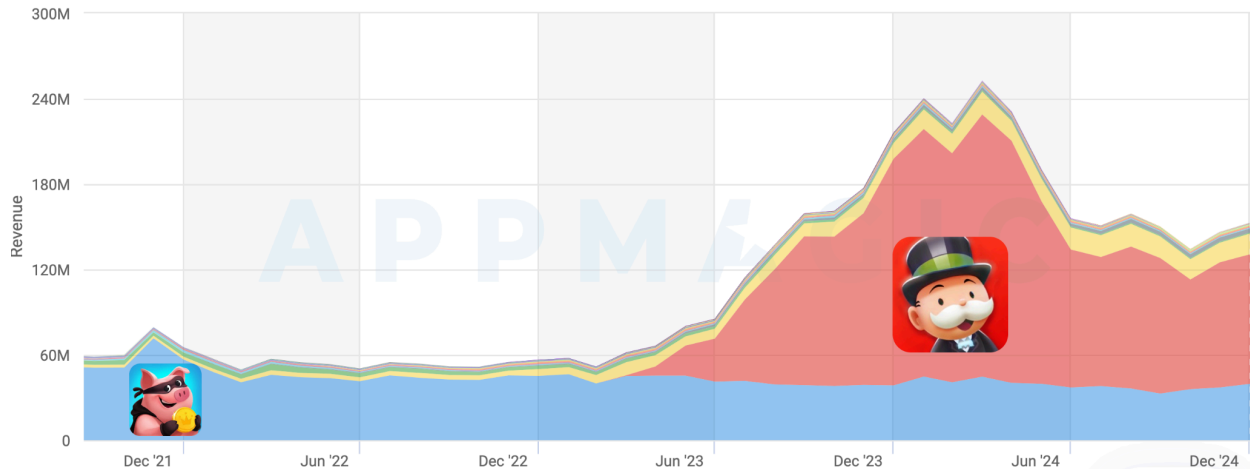
Casual Casino: The Most Monopolized Genre?



Market Segment Comparison: [Casual Casino Dashboard](#)

The story of *Coin Master* losing its dominance after *Monopoly GO!* had disrupted the market was one of the most fascinating developments of 2023. In 2024, we were lucky to watch this story unfold as it reshaped the market along the way. *Monopoly GO!* firmly established itself as the No.1 Casual Casino game, which now influences not only its own genre but other casual games as well.

Scopely’s magnum opus defines the Casual Casino to such an extent that discussing the genre’s trends essentially means analyzing how the game’s revenue evolves. In Q2 2024, *Monopoly GO!* began to slow its scaling efforts and transitioned into the operational phase. This shift explains why our H1’24 Casual Games Report [highlighted](#) a 146% YoY revenue growth while the full-year perspective shows a “mere” +60% YoY increase. When it comes to downloads, *Monopoly GO!*’s shift away from scaling led to a 24% decline in downloads across the entire genre.



Casual Casino: [Market Segment Dashboard](#)

Another major factor likely to influence the Casual Casino genre in 2025 is Playtika's two significant acquisitions over the past two years:

— In September 2024, the Israel-based company [acquired](#) InnPlay Labs, the studio behind *Animals & Coins Adventure Game*, the fourth-largest title in the genre, for \$300M.

— In November 2024, Playtika made a \$2B [acquisition](#) of SuperPlay, the studio behind [Dice Dreams](#), the third-largest Casual Casino title.

Playtika's control over the two titles that rank right below the two long-standing market leaders further consolidates an already highly concentrated market. Meanwhile, if you think that is all there is to Playtika, there is more! In fact, the company published 4 out of the top 10 games, including [Board Kings: Board Dice Games](#) and [Pirate Kings](#).

In 2024, *Monopoly GO!* generated 55% of the genre's entire revenue, with *Coin Master* holding ~18% and *Dice Dreams* ~7%. This means that nearly 80% of the market's revenue comes from just three titles, making it one of the most monopolized genres in the industry!

If you're interested in tracking *Monopoly GO!* events and over 180 other titles with daily data updates 7 days a week, our LiveOps & Updates Calendar is at your service.

[Contact us and grab a trial!](#)

The consolidated nature of the market is evident in the lack of significant movement within the genre's Top 10. Only one new title has entered, with the minor changes

primarily driven by a continuous decline in revenue.

| 2023 | 2024 |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  MONOPOLY GO! Tier-1 West (6 Countries) \$ 686.4M |  MONOPOLY GO! Tier-1 West (6 Countries) \$ 1.5B |
|  Coin Master Tier-1 West (6 Countries) \$ 497.6M |  Coin Master Tier-1 West (6 Countries) \$ 466M |
|  Dice Dreams™ Tier-1 West (6 Countries) \$ 101.1M |  Dice Dreams™ Tier-1 West (6 Countries) \$ 178.0M |
|  Board Kings: Board Dice Games Tier-1 West (6 Countries) \$ 21.4M |  Animals & Coins Adventure Game 1↑ Tier-1 West (6 Countries) \$ 27.1M |
|  Animals & Coins Adventure Game Tier-1 West (6 Countries) \$ 13.4M |  My Home My World™: Clean ASMR 1↑ Tier-1 West (6 Countries) \$ 11.6M |
|  My Home My World™: Clean ASMR Tier-1 West (6 Countries) \$ 11.3M |  Board Kings: Board Dice Games 2↓ Tier-1 West (6 Countries) \$ 11.5M |
|  Piggy GO - Clash of Coin Tier-1 West (6 Countries) \$ 8.5M |  Piggy GO - Clash of Coin Tier-1 West (6 Countries) \$ 9.3M |
|  Crazy Fox Tier-1 West (6 Countries) \$ 8.3M |  Crazy Fox Tier-1 West (6 Countries) \$ 8.3M |
|  Pirate Kings™ Tier-1 West (6 Countries) \$ 5.3M |  Pirate Kings™ Tier-1 West (6 Countries) \$ 4.2M |
|  Spin A Spell - Master of Coin Tier-1 West (6 Countries) \$ 3.8M |  Coin Tales new Tier-1 West (6 Countries) \$ 3.2M |

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Casual Casino: [Top 10 Games](#)

Due to the tough competition, there were only 17 new releases in the genre in 2024, and only one of them surpassed our \$50K/month success benchmark: [Fishing Travel](#) by Ark Game. The game is about fishing (who would have guessed, right?) with realistic graphics and casts instead of the usual rolls and throws you see in other titles. It seems like this fresh twist could help bring more male players to the game!

The best way to dive deeper into analyzing the Casual Casino genre is by exploring the practices and techniques used in *Monopoly GO!*. Luckily, we have an extensive overview of the game's LiveOps available [here!](#)

Casual Casino: Key Thoughts

As Casual Casino remains one of the toughest genres to break into, it is better avoided unless one has a significant budget and massive expertise. Even for larger publishers, entering this space isn't easy, which is why giants like Playtika often rely on M&A to

acquire successful projects that can be scaled further with more resources and knowledge.

That said, even if you aren't planning on making a Casual Casino game, the genre is packed with innovation in event design and monetization worth checking out. Games like *Monopoly GO!*, *Coin Master*, and *Dice Dreams* are great sources of fresh ideas to level up your LiveOps and creative strategies.

Don't want to wait for our analysis of the genre most relevant to you? Or want us to look into a specific field? We've got you covered.

Reach out to us, and our analysts will put together a custom research report tailored to your business goals. [Contact us via email](#).

Key Takeaways

Last year was all about casual game developers finding creative ways to adapt to growing competition amidst post-IDFA and post-pandemic challenges.

In bigger genres, game-makers doubled down on LiveOps and monetization. Established titles in Match-3 with Complex Meta, Merge-2, and Casual Casino invested in their LiveOps heavily to enhance player retention and boost revenue.

Refining event schedules, introducing new features, and borrowing best practices from other genres have all become must-have strategies for big developers aiming to hold their ground at the top.

And don't let the higher success rate of these genres trick you. There are much fewer newcomers, and they are coming way more prepared!



Emerging genres in 2024 were all about embracing hybridcasual and adding depth to hypercasual. Both established companies and emerging studios took the simplistic, catchy core of hypercasual games and layered it with casual features like boosters, light meta systems, and more refined monetization strategies.

However, while these new genres offer plenty of opportunities, the stories of Match 3D and Sort Puzzle demonstrate that even in the early stages, startups need to think of LiveOps and monetization more than before if they aim to stay competitive in the long run.

Where to look for the next hottest niche? While no one can say for sure, we'd recommend keeping a close eye on hypercasual subgenres in 2025, especially puzzles. After all, both Match 3D and Sort Puzzle originated from this space and went on to stand tall among casual genres in their own right.

Right now, AppMagic classifies over 50 tags in hypercasual puzzles alone! While it's borderline impossible to explore everything, focusing on the largest and most impactful niches can give you plenty of ideas and innovative core mechanics. Even if these don't become the foundation of your next game, they could inspire fresh creatives or mini-games for your projects. The opportunities are endless!

Thanks for sticking with us to the end! If you enjoyed the report and want more content like this, consider following us on [LinkedIn](#), [Facebook](#), or [Telegram](#)—it's the best way to stay connected and up-to-date with our latest insights.