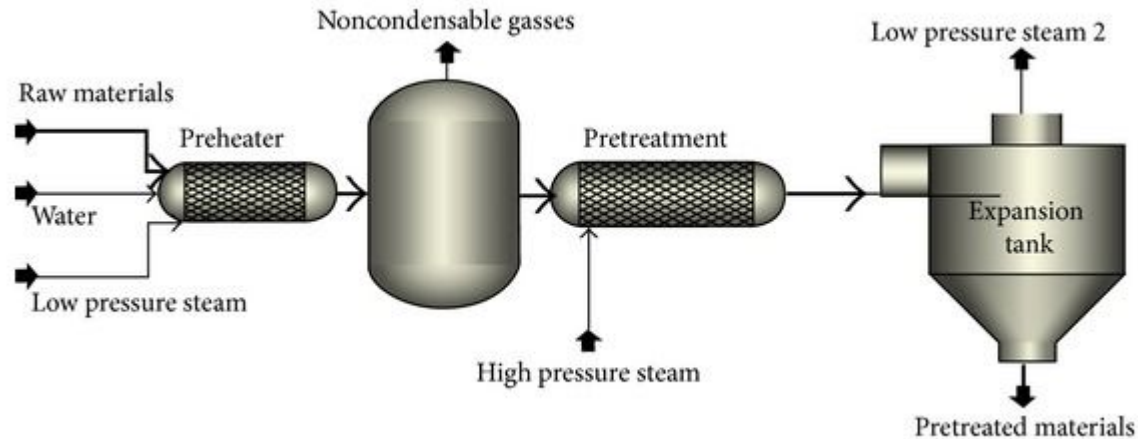


# What's Happening at with the Steam market?

Some random thoughts for discussion..



# Shifting markets...mobile...

Revenue Generated, U.S. App Store Top 100 Grossing Games



■ % REVENUE FROM PREMIUM GAMES   ■ % REVENUE FROM FREEMIUM GAMES

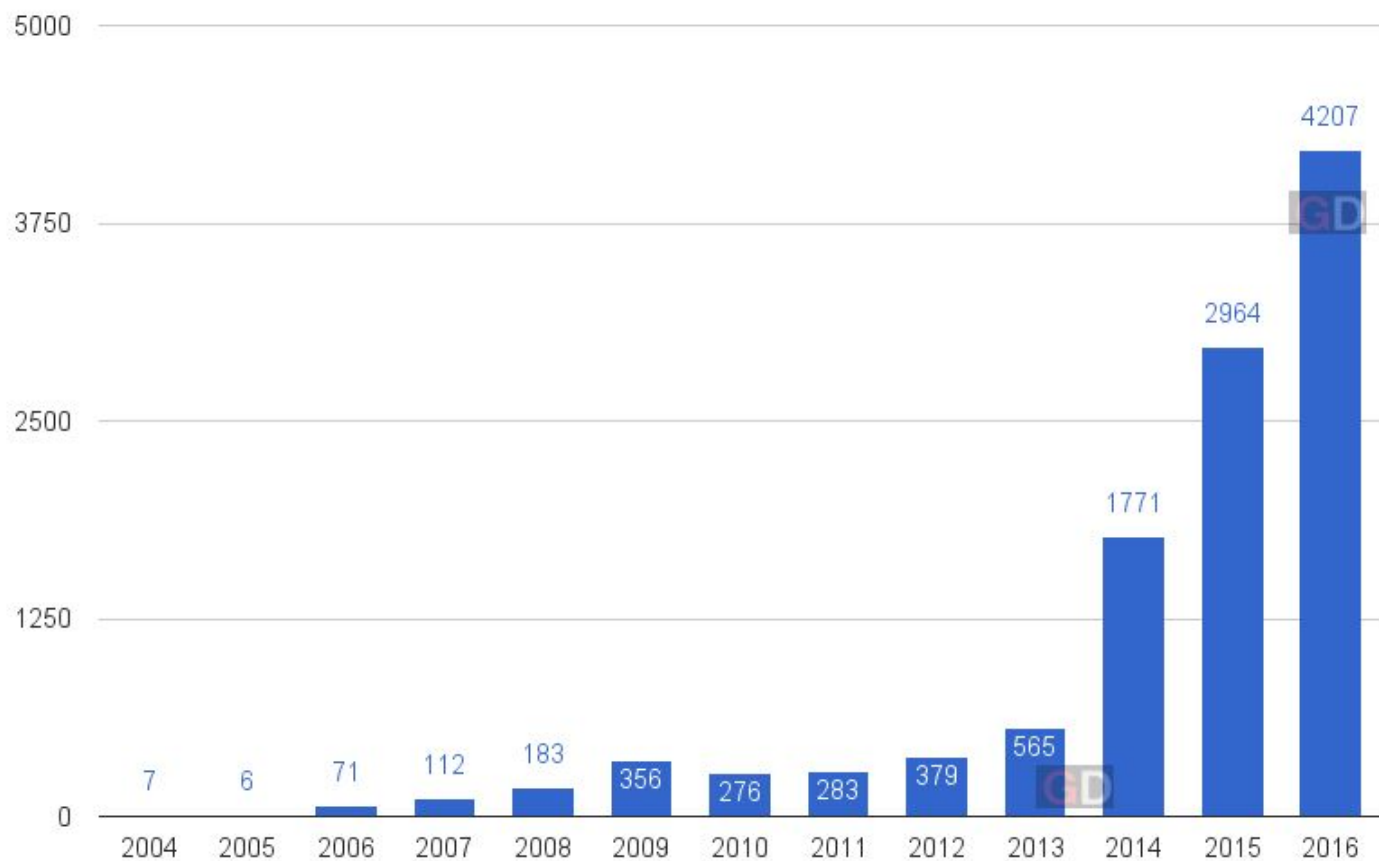


Sources: iTunes App Store, Flurry Analytics, Flurry Analysis

# Shifting markets...Auroch Digital history...



## Number of Games Released on Steam Per Year

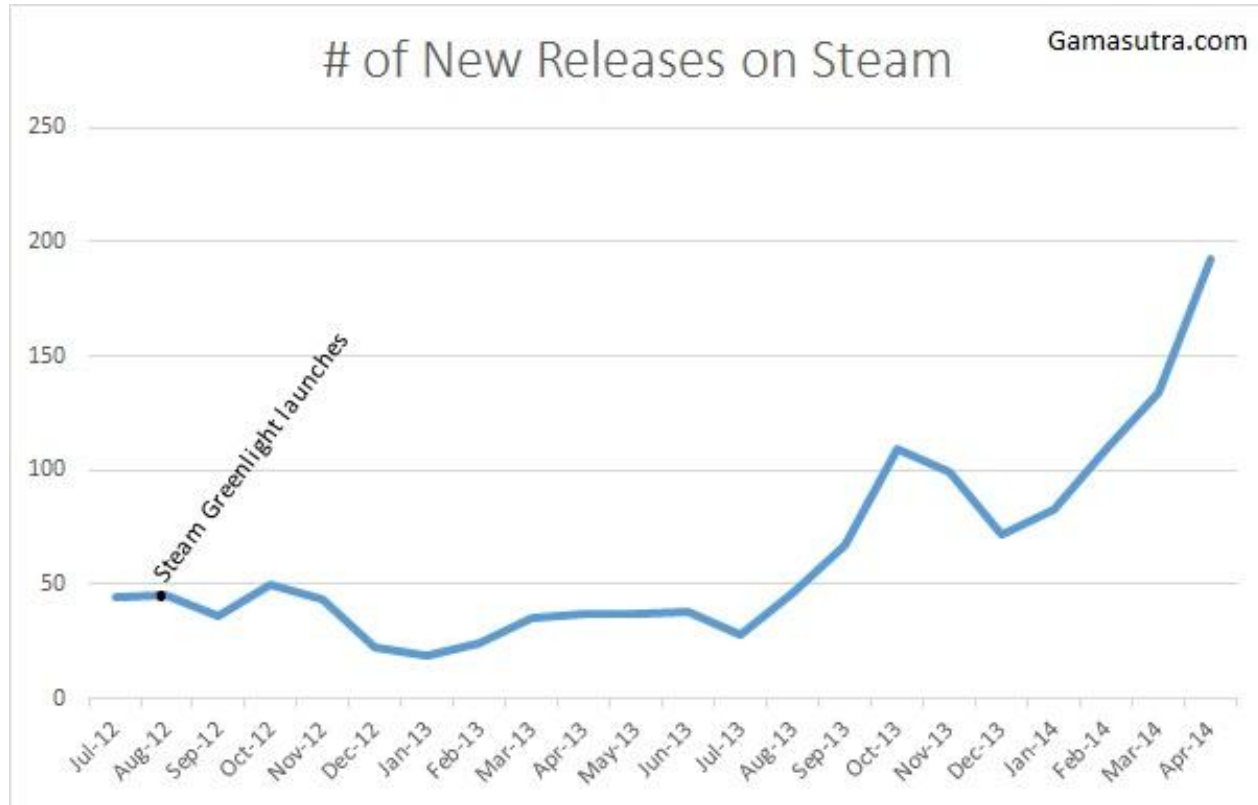


# Pre 2013...

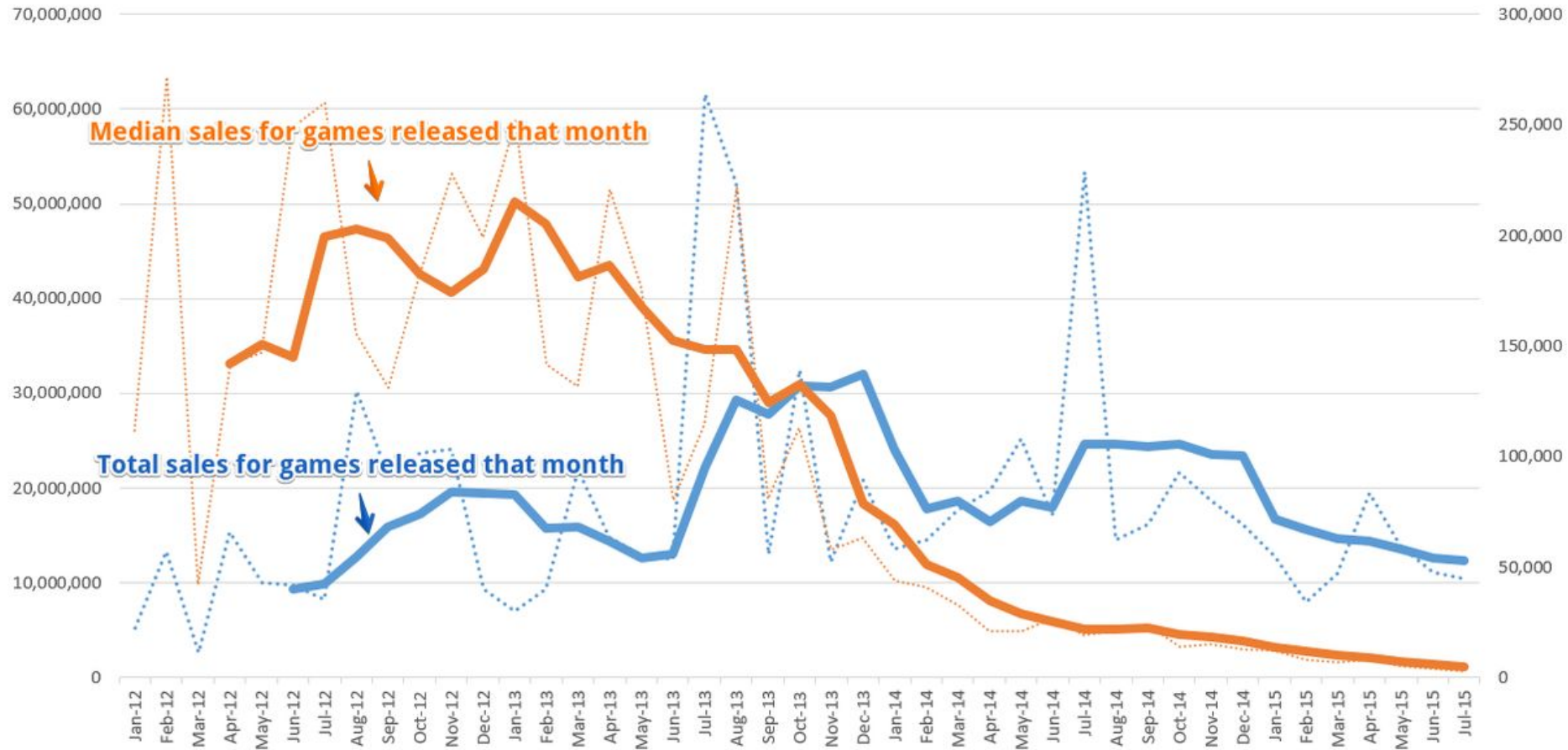
This is a different world than the one Ruiz and Wegner operated in when they started working on *Aztez* in 2010. Back then, Steam was a curated space, where employees worked directly with developers to approve their games and get them on the store. A handful of titles went live every week, and indie developers lucky enough to secure a Steam deal could generally bank on that release to see them through the fiscal year. **Getting on Steam was like hitting the jackpot.**

That changed in 2012. Indie games were all the rage, development tools were becoming increasingly accessible, and there were hundreds of new titles ready to be distributed every day. Steam set up Greenlight, a system where players themselves approved indie games for the store, and Early Access, where developers could publish games-in-progress for community feedback, allowing them to feed the hype beast from day one.

# Then it started to change...



Total monthly sales vs median monthly sales



## NUMBER OF RELEASES PER WEEK ON STEAM (INCL. EA AND OUT-OF-EA)



ICO Steam weekly newsletter: [icopartners.com/steam-newsletter/](http://icopartners.com/steam-newsletter/)

SOURCE: ICO PARTNERS



# The outcome?

## Steam Direct fails to prevent revenue drop for indies

Average first month sales down by 39% since 2015, average naïve revenue down by almost 50%

The launch of Steam Direct has done little to improve independent developers' chances of a strong launch on the leading PC games marketplace.

New figures from [SteamSpy's Sergey Galyonkin](#) show naïve sales and revenue for all indie games released since Steam Direct launched in June. The data covers the first 30 days of sales for each title.

The analyst warns that a number of assumptions need to be acknowledged before exploring the stats in greater detail, such as the fact that naïve revenue doesn't factor in VAT, taxes or Steam's share, nor was he able to take regional pricing or



**James Batchelor**  
UK Editor  
Friday 15th September  
2017

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# Marketing alone will not save you...

An unfathomable market, fickle players, the battle of attrition to get some thought, some feeling, some substantive point out into the world of games, The Magic Circle had fallen victim to the very things it had attempted to satirise. As if to drive the irony home—to complete the set of developers, fans, and critics being made to look foolish—evangelical reviews at major publications barely affected The Magic Circle's sales. Perhaps in a realer way than was intended, Question had exposed games' raw, difficult-to-look-at underbelly.

"I'm not trying to start any fights," Thomas says, "But the truth is, on the days when a major publication published a glowing review of our game, and we had a few, we barely saw a sales spike. Meanwhile, Jim Sterling published a video of the first ten minutes and we got the biggest sales jump we ever saw."

"Compared to a lot of other games we had a lot of coverage," continues Alexander. "Those articles though, they would come and go within a day, and the people reading them were probably already enthusiasts. Then again, we share the blame. What we chose to make was

## NUMBER OF ARTICLES FOR THE GAME LAUNCH



# What went wrong with Lawbreakers?

Boss Key's Cliff Bleszinski and Arjan Busse reveal the various avenues they're exploring to recover from a rocky launch

Lawbreakers is not off to the best start.

Released in August, the frantic, gravity-bending multiplayer shooter is the debut title from Boss Key Productions - the studio formed in 2014 by Gears of War creator Cliff Bleszinski and Guerrilla Games co-founder Arjan Brussee.

With such talent behind the project, expectations were understandably high but while the game reviewed well enough, post-launch coverage was not quite as positive. "Launch numbers lower than Battleborn" is not a headline that would have been well received in the Boss Key halls - particularly as Battleborn has since seen all development support pulled and been left to die.



**James Batchelor**

UK Editor

Thursday 26th October  
2017

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## COMPANIES IN THIS ARTICLE

[Boss Key Productions](#)

# Fleeing to console (as we fled mobile...)

Ruiz and Wegner did a lot of things right when it comes to savvy indie distribution -- Ruiz sent out press releases, published YouTube videos and got some high-profile streamers to play *Aztez* -- but they were a few years behind the market. They launched on Steam when consoles might have been a better move.

Now they're working on PS4, Xbox One and Switch versions of the game. *Aztez* is actually running on all of those platforms, but it probably won't launch until early next year, after the holiday rush.

By that time, it's hard to say where the market's energy will be. *Aztez* could easily miss out on the console bubble, too. For instance, plenty of players today are excited about indie games on the Switch, but there's no telling how long that interest will last.



# Indiepocalypse or Steampocalypse?



# The context of history...

