STEAM IN 2017

The annual overview of the current state

of the biggest PC gaming platform.
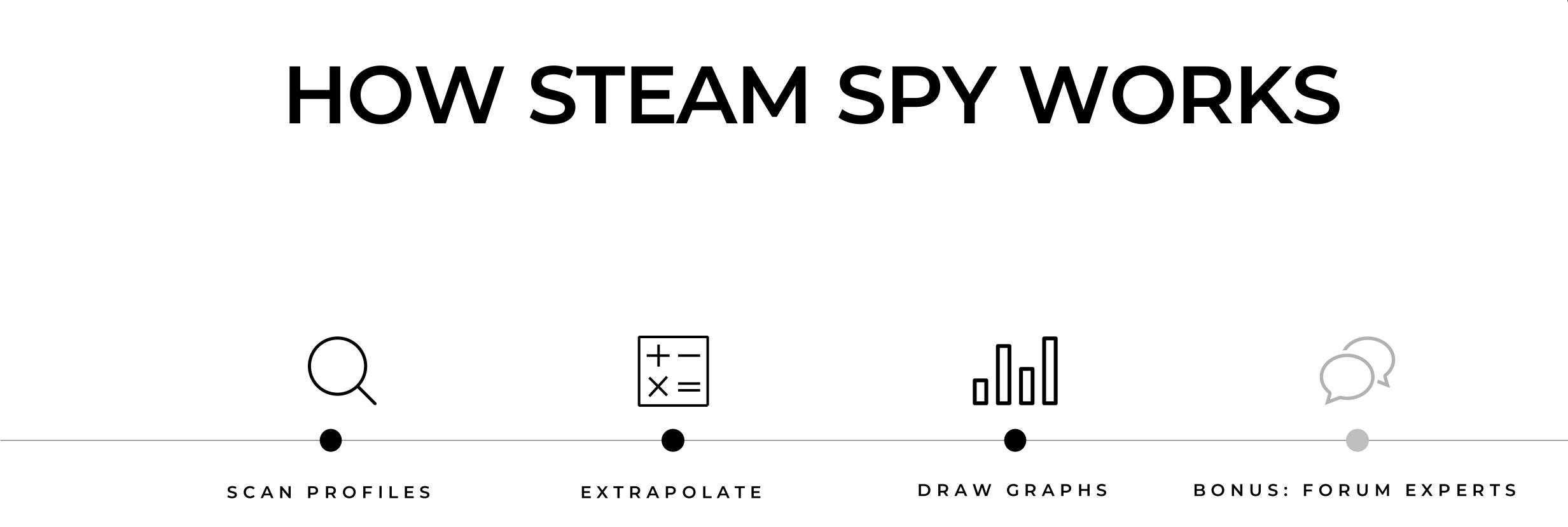
GDC 2018

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My name is
SERGEY GALYONKIN

I've created Steam Spy.

I work as a Director of Publishing Strategy at Epic Games.
Previously I worked for Wargaming, Nival, 1C-Softclub and
other gaming companies.

I wrote a book on videogames marketing and co-host a
podcast about game development.

HOW STEAM SPY WORKS

SCAN PROFILES

EXTRAPOLATE

DRAW GRAPHS

BONUS: FORUM EXPERTS

Steam Spy scans around 800,000 user profiles per day and uses a 3-days sample to estimate the basic stats. Steam Spy relies on Steam API for its estimates and if something isn't exposed (like DLCs or per-game retention), Steam Spy can't display it.

Steam Spy also scans a number of other open and closed APIs, including but not limited to Twitch, Youtube, and Steam DB.

The site isn't real-time (it takes 4 days to catch-up) and isn't precise, but is good enough for broad market analysis.

FINE PRINT

Steam Spy only tracks owners and players, not sales. Steam Spy doesn't track DLCs or MTXs.

It's impossible to distinguish between games sold on Steam, sold elsewhere and given away for free. For purposes of this presentation we're measuring the market Steam controls, not the sales coming directly through Steam.

Steam Spy uses 98% confidence range and is very inaccurate for small games, especially the ones below 30K owners.

Geography on Steam Spy relies on self-reported data. Only engaged users fill out the country field in their profiles, therefore the geo-data is inevitably skewed.

Steam Spy tracks users playing games, not idling in Steam client or botting trading cards.

Steam Spy is very inaccurate as a method of tracking refunds. I do have small sample of data on refunds from a dozen of developers, but I don't feel confident about it to include it here.

The site uses 3-days sampling. For this presentation I used 10-days sampling.

Steam Spy only uses public profiles to gather and estimate data. 99.9% profiles on Steam are public.

Steam Spy is always lagging by at least 4 days, and is completely inaccurate for new titles.

The original algorithm used by Steam Spy was developer by Kyle Orland for Ars Technica and presented here on GDC in 2015.

Hope you've read and remembered everything.

There is going to be a test at the end of the presentation.

THE BEST YEAR FOR VALVE

$4.3B

total Steam revenue from paid games sales (estimate).
Doesn't include DLCs, MTXs and other in-app purchases.

$3.5B in 2016
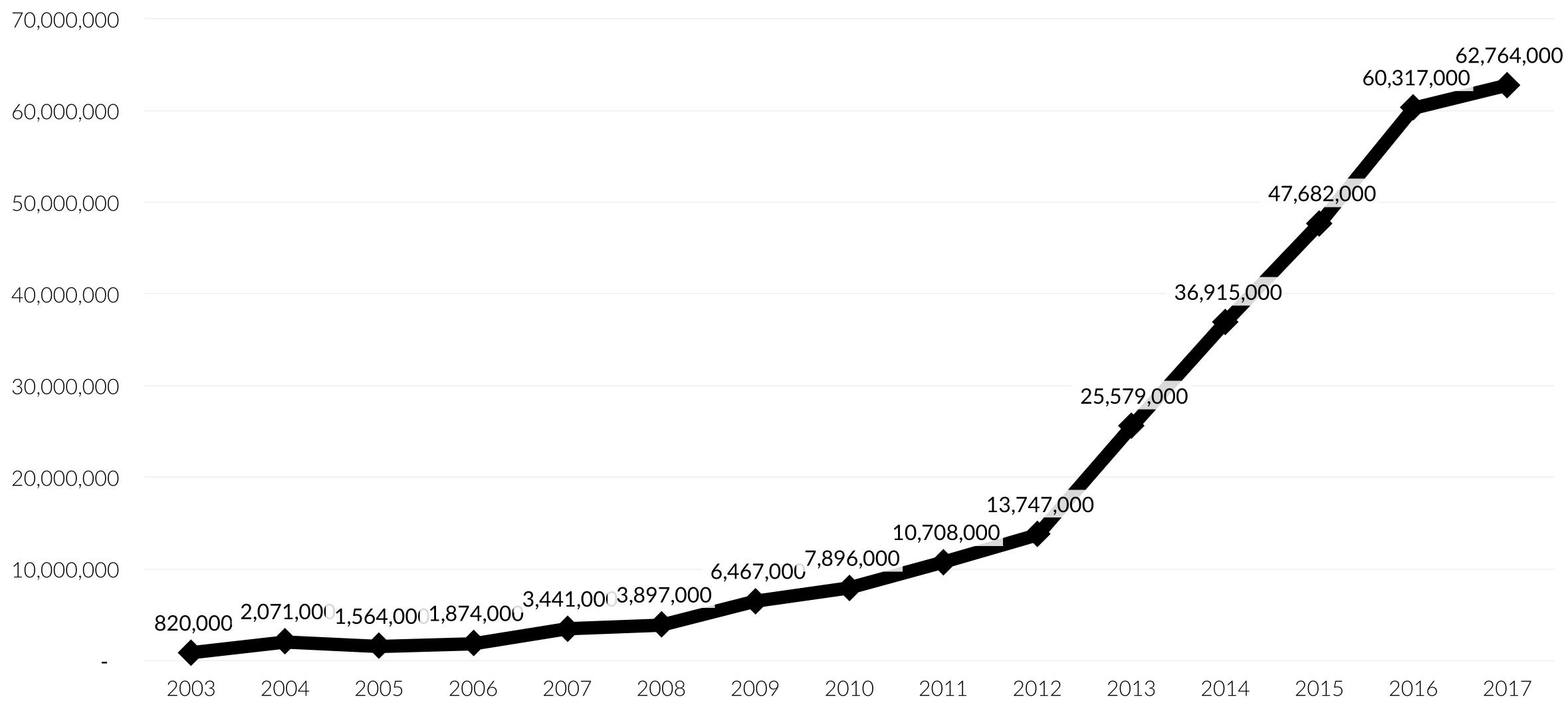
THE
STEAM
AUDIENCE
IN 2017

MORE PLAYERS THAN EVER

291M

total players on Steam

63M

joined in 2017
(that's **22%**)

NEW USERS BY YEAR

THE RETENTION IS AMAZING
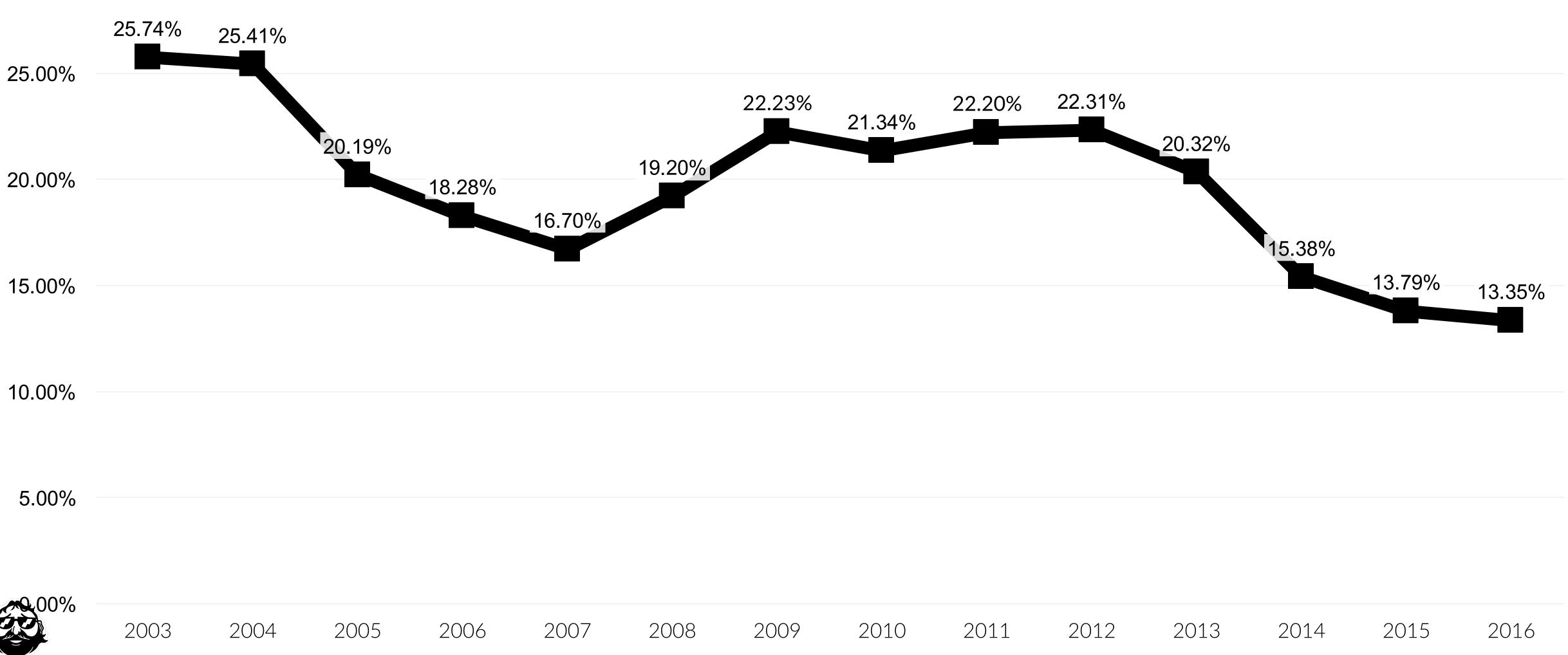
57M
players were active
in the last 2 weeks

31%
of active players
joined in 2017

RETENTION BY YEAR

Year	Retention
2003	25.74%
2004	25.41%
2005	20.19%
2006	18.28%
2007	16.70%
2008	19.20%
2009	22.23%
2010	21.34%
2011	22.20%
2012	22.31%
2013	20.32%
2014	15.38%
2015	13.79%
2016	13.35%

NEW USERS BUY LESS

2
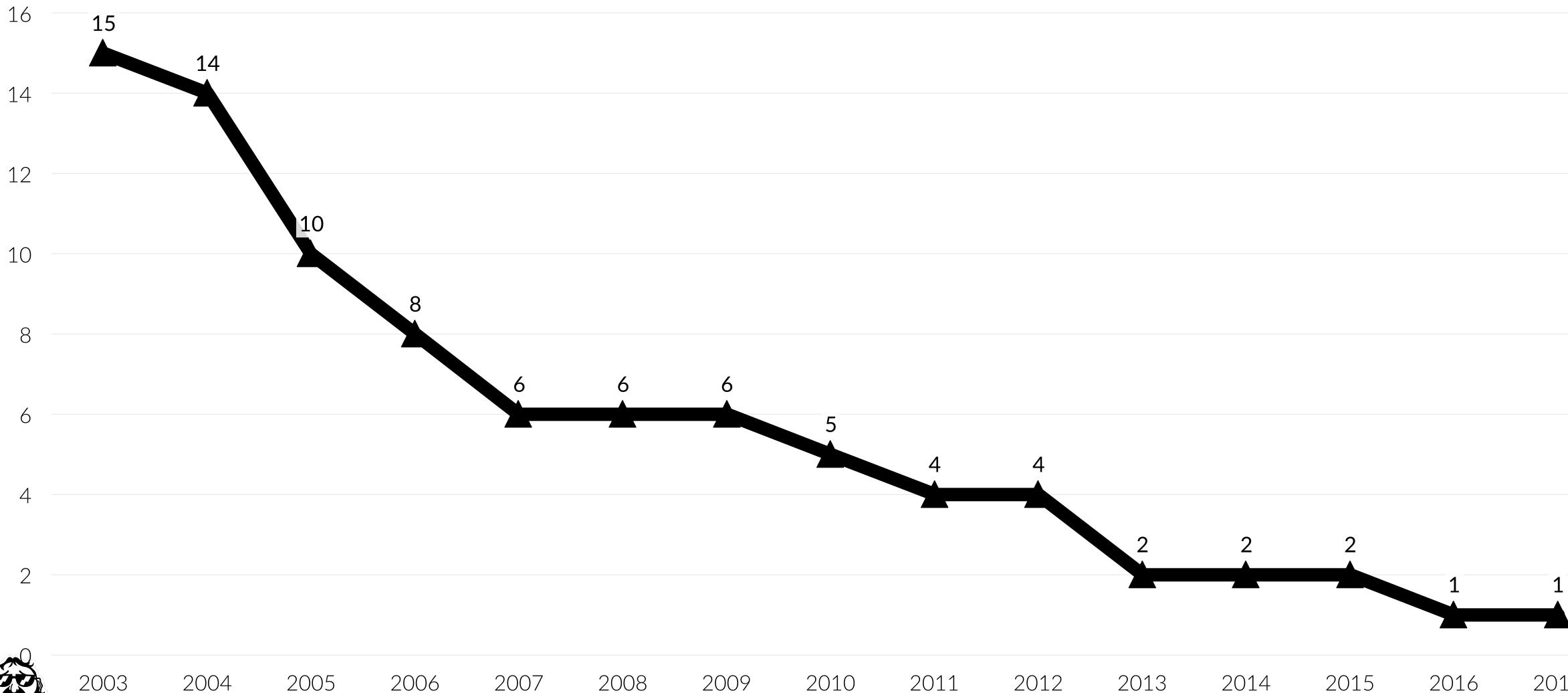
games per user (median average)
(**10.8** mean average)

1
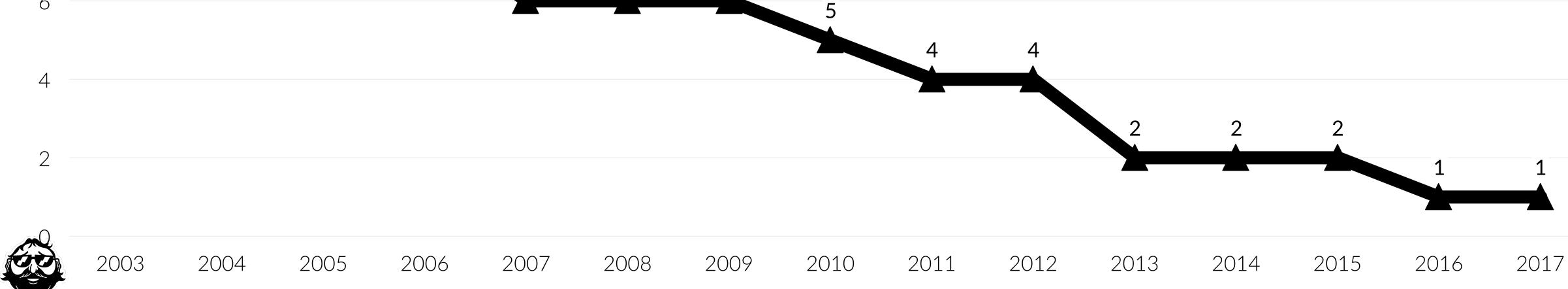
game per user that joined in 2017
(**3.9** mean average)

MEDIAN GAMES BY YEAR

THE TOP GAMES ON STEAM IN 2017

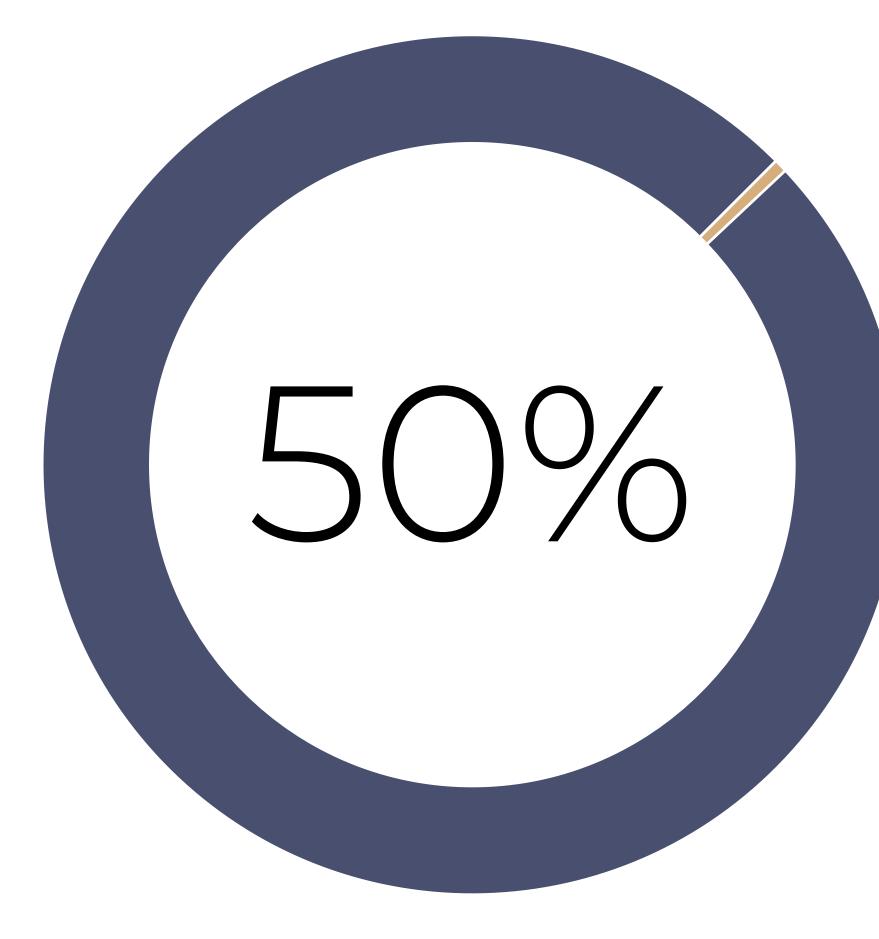# MORE GAMES ARE RELEASED THAN EVER

21,406

games on Steam
(probably more now)

7,696

games released in 2017
(**39%** of all titles)

WINNER TAKES ALL

Steam sales are heavily skewed to the top

50%

TOP 100 GAMES

(that's **0.5%** of all titles)

accounted
for **50%** of all revenue
on Steam in 2017

THE WINNERS

#	Game	Copies	Revenue
1	PU Battlegrounds	27,795,000	$600M
2	Counter-Strike: Global Offensive	12,537,000	$120M
3	Grand Theft Auto V	3,462,000	$83M
4	Call of Duty: WWII	840,000	$41M
5	Sid Meier's Civilization VI	1,134,000	$39M
6	The Witcher 3: Wild Hunt	1,895,000	$38M
7	Divinity: Original Sin 2	1,004,000	$37M
8	TC Ghost Recon Wildlands	820,000	$33M
9	Total War: WARHAMMER II	643,000	$32M
10	Middle-Earth: Shadow of War	697,000	$31M

#	Game	Copies	Revenue
11	TC Rainbow Six Siege	2,958,000	$30M
12	NieR: Automata	668,000	$29M
13	ARK: Survival Evolved	1,529,000	$28M
14	For Honor	587,000	$26M
15	Assassin's Creed Origins	607,000	$25M
16	Resident Evil 7	545,000	$24M
17	Dark Souls III	1,023,000	$24M
18	Rocket League	1,818,000	$23M
19	Football Manager 2018	590,000	$23M
20	Cuphead	1,336,000	$22M

THE TOP GAMES ARE SAFE

$22M

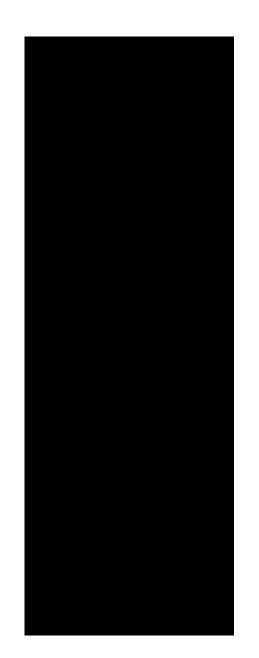in gross revenue was needed to
break into Steam's top 20 in 2017

$22M

in gross revenue was needed to
break into Steam's top 20 in 2016

THE
INDIE GAMES
ON STEAM
IN 2017

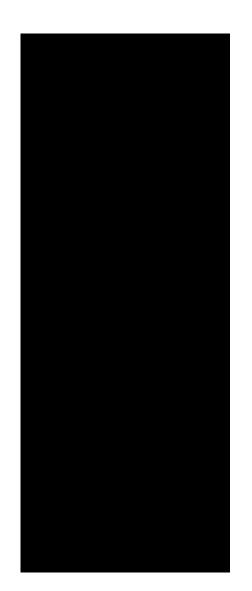# SALES ARE GOING DOWN

9,500

median owners
for a game on Steam

5,000

median owners
for an **indie** game
on Steam

1,500

median owners
for an **indie** game
released **in 2017**

PRICES ARE GOING DOWN

$5.99

median price
for a game on Steam

$3.99

median price
for an **indie** game
on Steam

$2.99

median price
for an **indie** game
released **in 2017**

BUT NOT REALLY

$150K

in gross revenue was needed to
break into Steam's top 2,000 in 2017

$160K
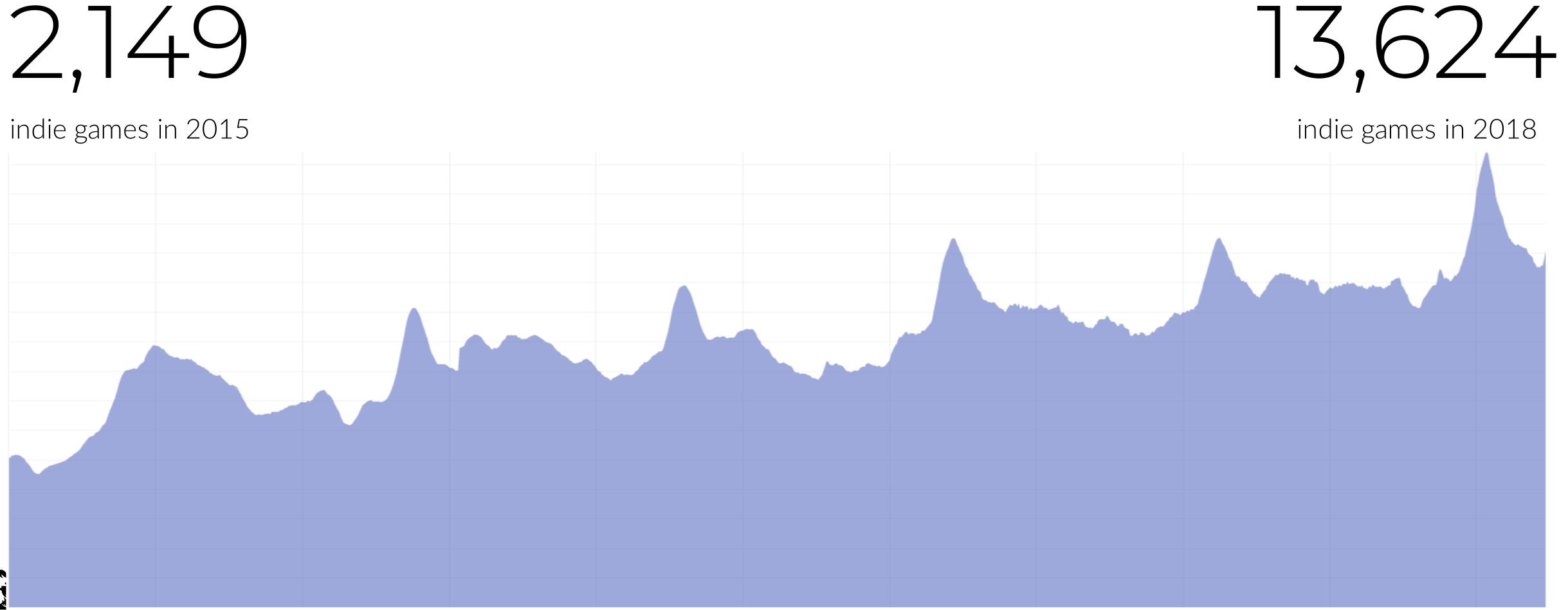
in gross revenue was needed to break
into Steam's top 2,000 in 2016

More games are competing for the growing market, and while it is harder for new titles, the decline in sales mostly affects the games outside of top 10,000.

THE INDIE ENGAGEMENT
CAN'T KEEP UP WITH THE GROWTH

2,149

indie games in 2015

13,624

indie games in 2018

INDIE AUDIENCE IS BIG

65M

players own at least 1 paid indie game
(**22%** of total Steam audience)

24M
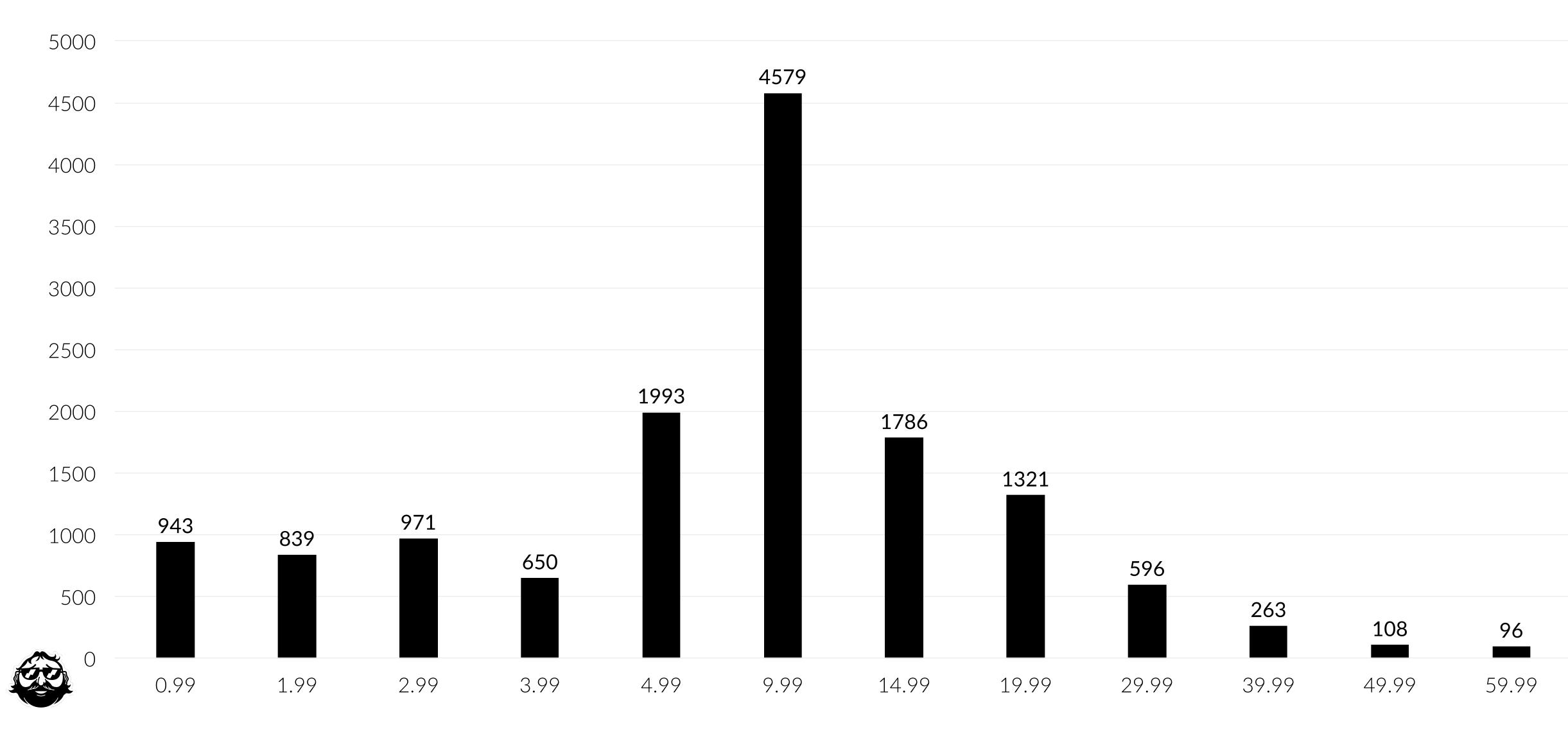
players own 5 or more paid indie games

Prices on Steam fluctuate significantly through the year, so for the following slides I've used the maximum price for each game during 2017.
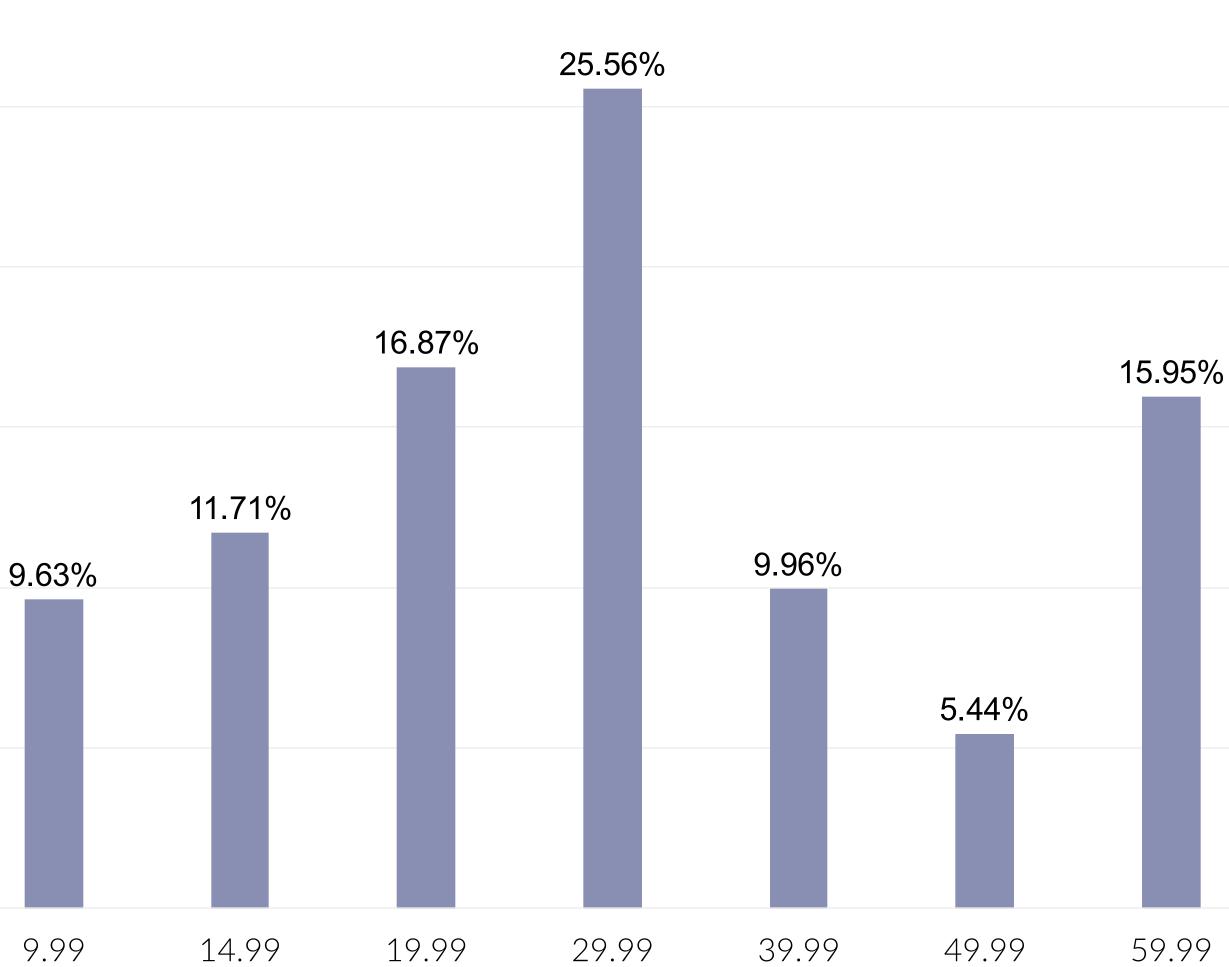
GAMES IN 2017 BY MAX PRICE

Price	Count
0.99	943
1.99	839
2.99	971
3.99	650
4.99	1993
9.99	4579
14.99	1786
19.99	1321
29.99	596
39.99	263
49.99	108
59.99	96

REVENUE IN 2017 BY MAX PRICE

Max Price	Revenue
0.99	0.62%
1.99	0.55%
2.99	0.72%
3.99	0.89%
4.99	2.11%
9.99	9.63%
14.99	11.71%
19.99	16.87%
29.99	25.56%
39.99	9.96%
49.99	5.44%
59.99	15.95%

...AND WITHOUT PUBG

DIRECT vs GREENLIGHT
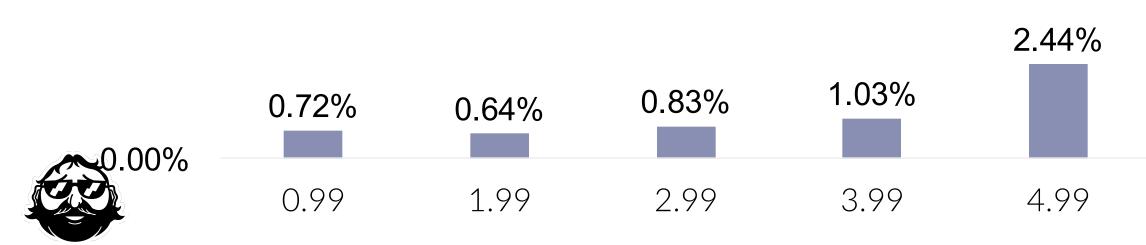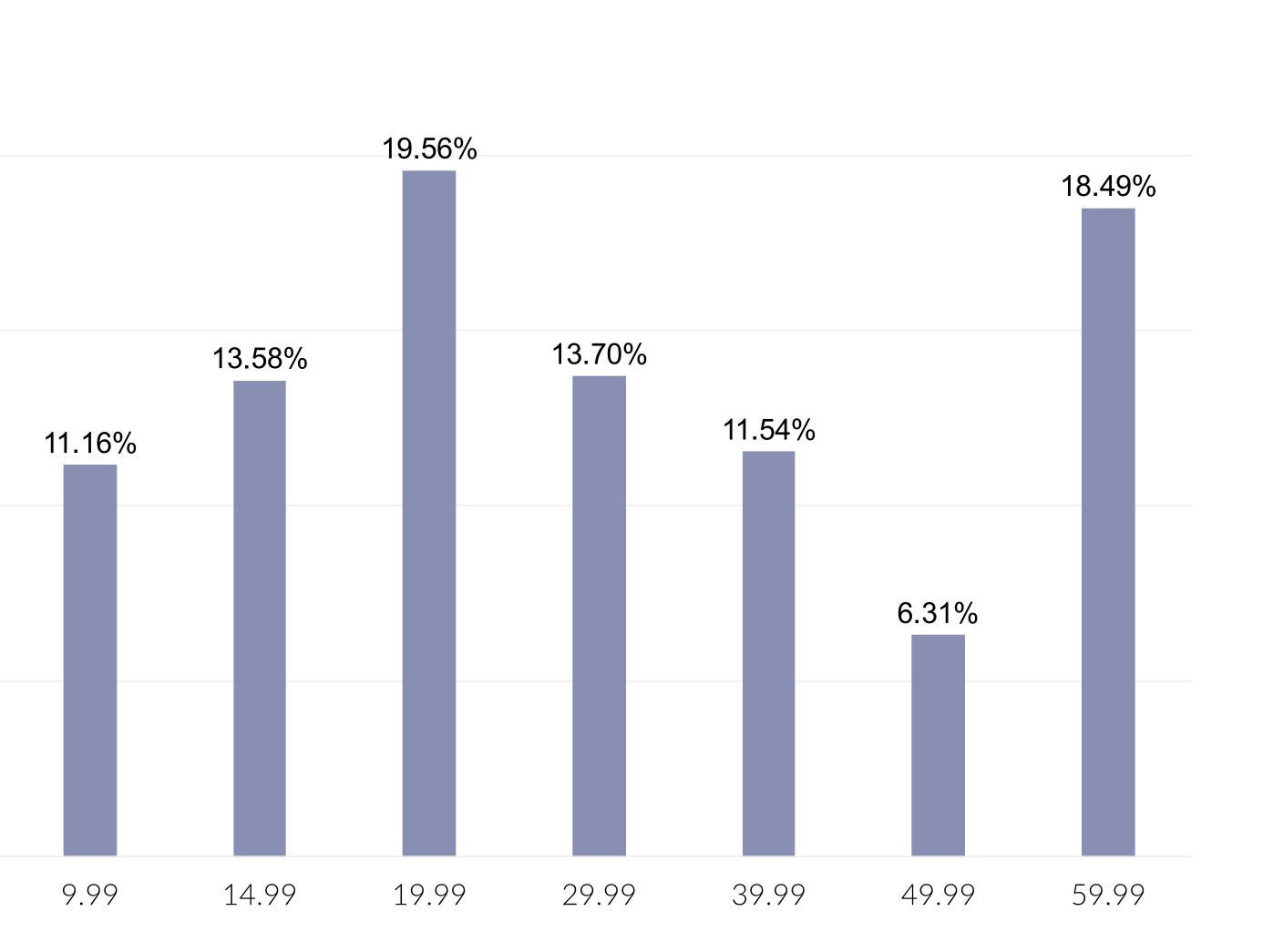
7,606

games released in 2017 (39% of all games on Steam)

864

games released in September 2017 alone
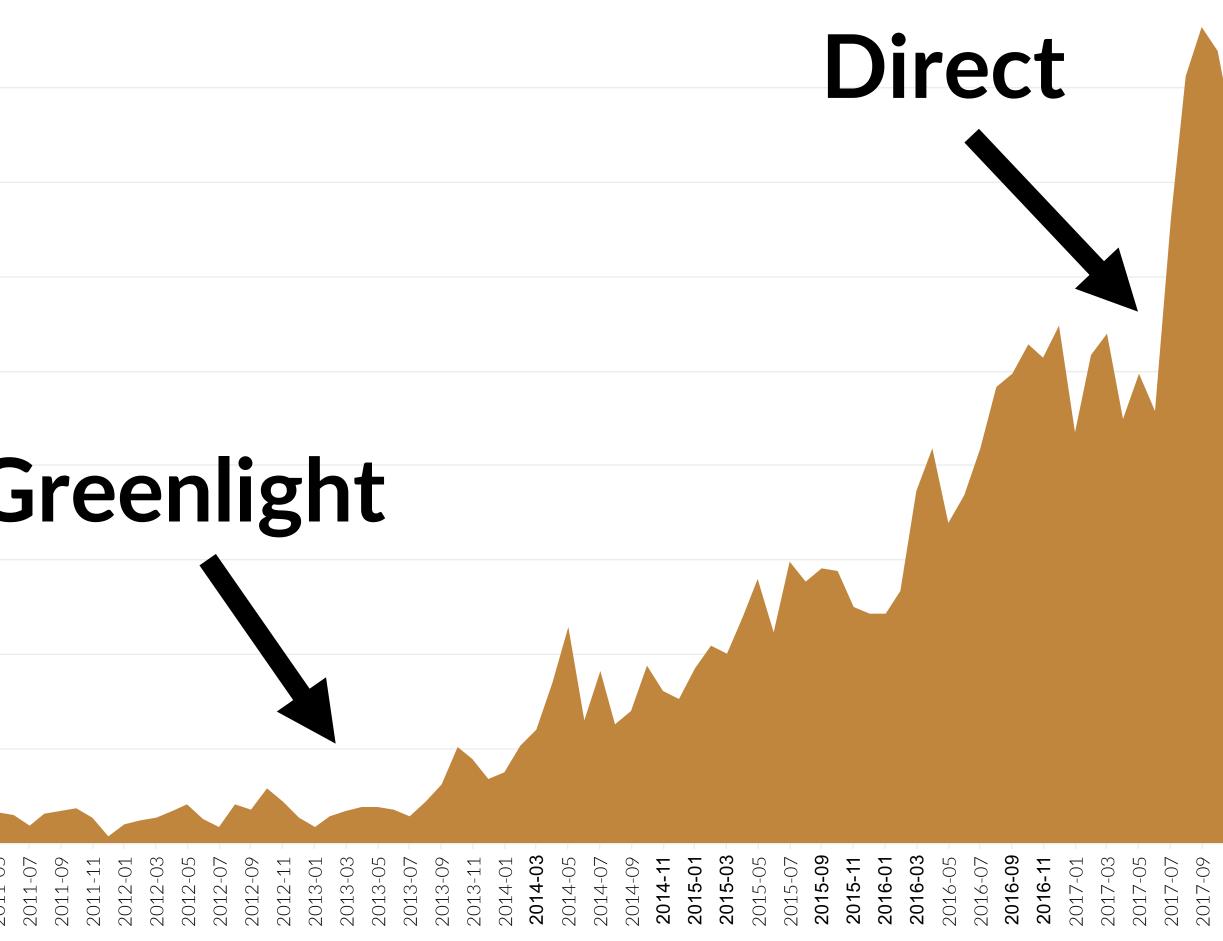
55%

average month-over-month increase in number of new releases since Steam Direct

NEW GAMES BY MONTH

Direct

Greenlight

TAGS & TRENDS

The biggest growing tags in the past 5 years
(as defined by changes in average owners)

1. Dinosaurs

2. Conspiracy

3. Trading

4. Robots

5. Post-apocalyptic

The most declining tags in the past 5 years

1. Team-based

2. PvE

3. Psychological

4. Heist

5. Military

CHINA
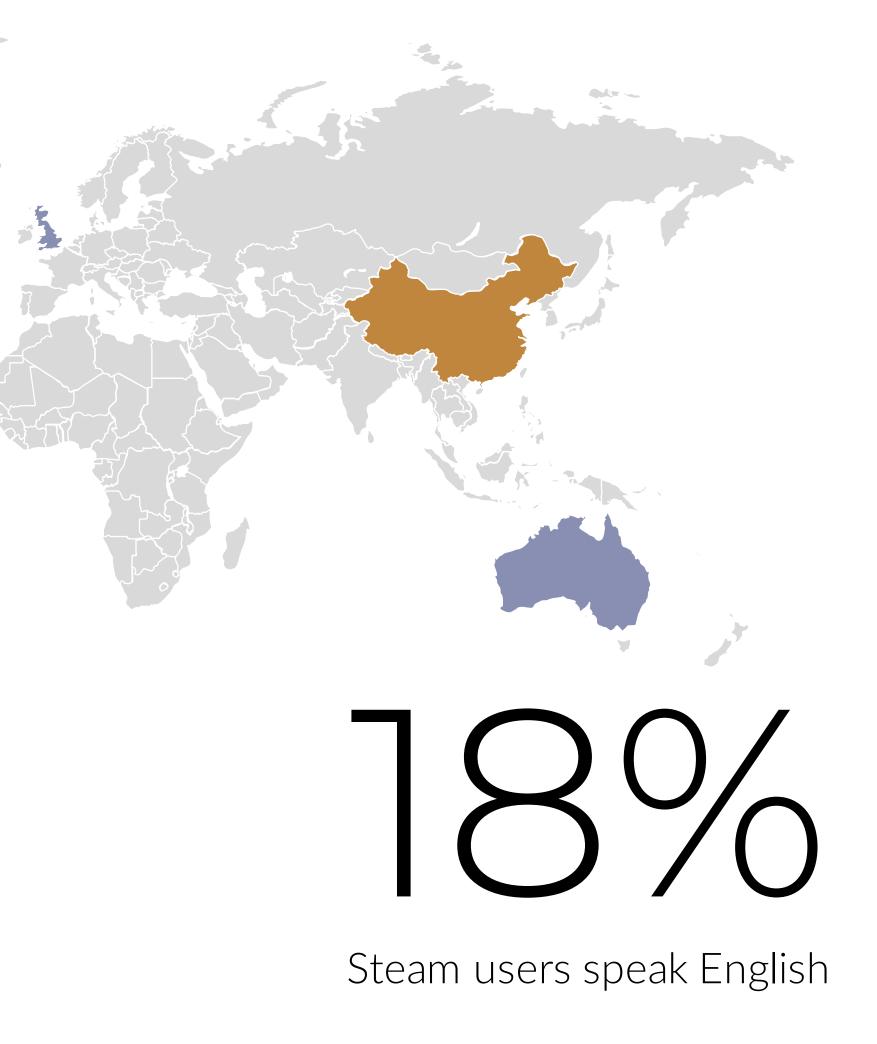#1

STEAM HARDWARE SURVEY

64%
Steam users speak Chinese
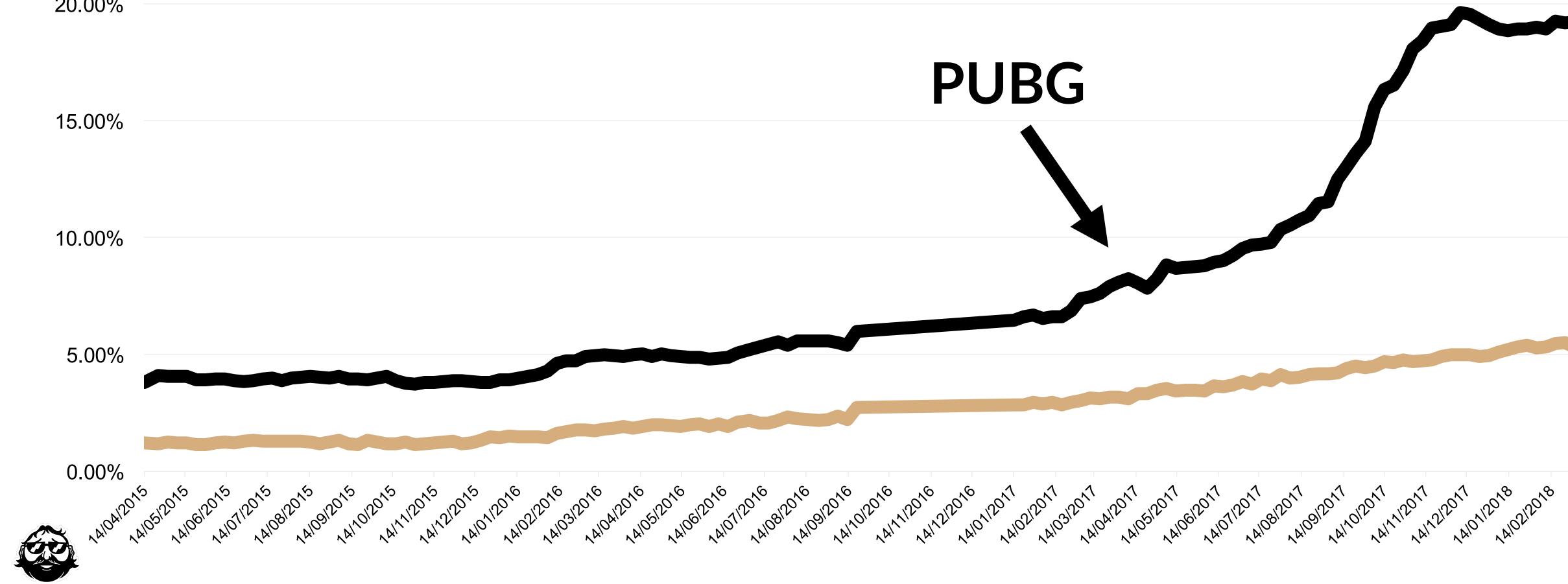
18%
Steam users speak English

But wait, Steam
isn't even officially available
in China!

CHINA IN PLAYERS & GAMES

— Players — Games

PUBG

25.00%
20.00%
15.00%
10.00%
5.00%
0.00%

14/04/2015 14/05/2015 14/06/2015 14/07/2015 14/08/2015 14/09/2015 14/10/2015 14/11/2015 14/12/2015 14/01/2016 14/02/2016 14/03/2016 14/04/2016 14/05/2016 14/06/2016 14/07/2016 14/08/2016 14/09/2016 14/10/2016 14/11/2016 14/12/2016 14/01/2017 14/02/2017 14/03/2017 14/04/2017 14/05/2017 14/06/2017 14/07/2017 14/08/2017 14/09/2017 14/10/2017 14/11/2017 14/12/2017 14/01/2018 14/02/2018

CHINA

19.5%

of active **players**
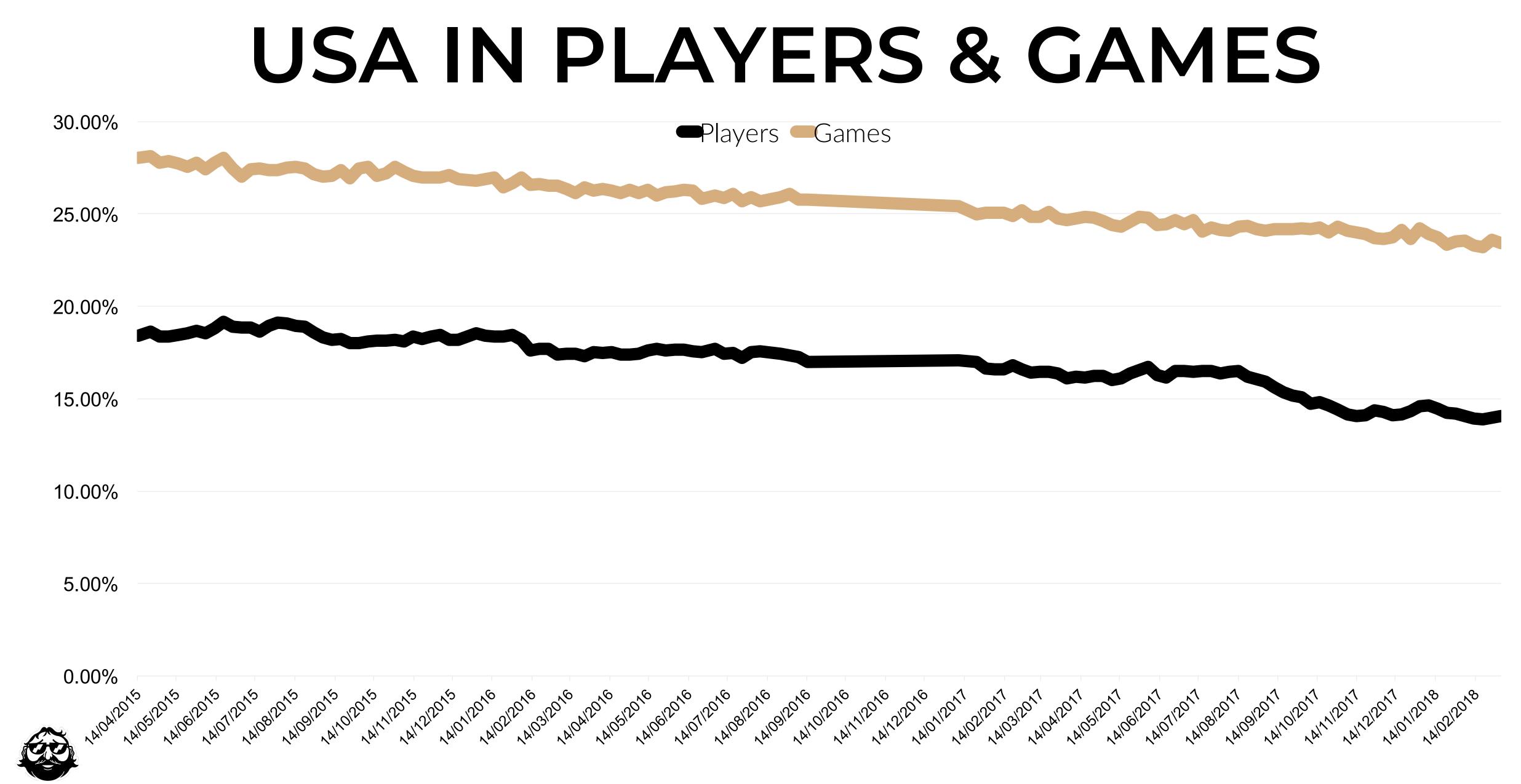
5.4%

of all owned games on Steam

Cybercafes in China
are installing Steam
so their clients
can play PUBG

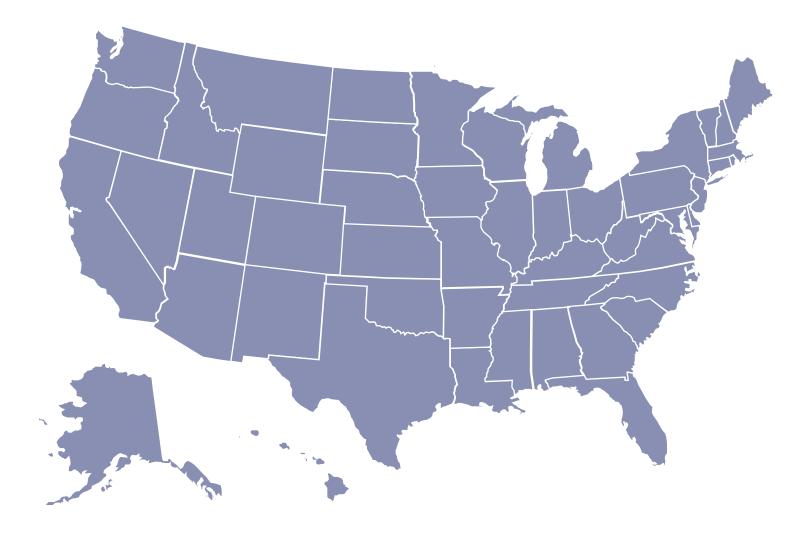# USA IN PLAYERS & GAMES

USA

13.9%
of active **players**

23.3%
of all owned games on Steam

USA vs CHINA

6x

an average user from the US
owns 6 times more games than
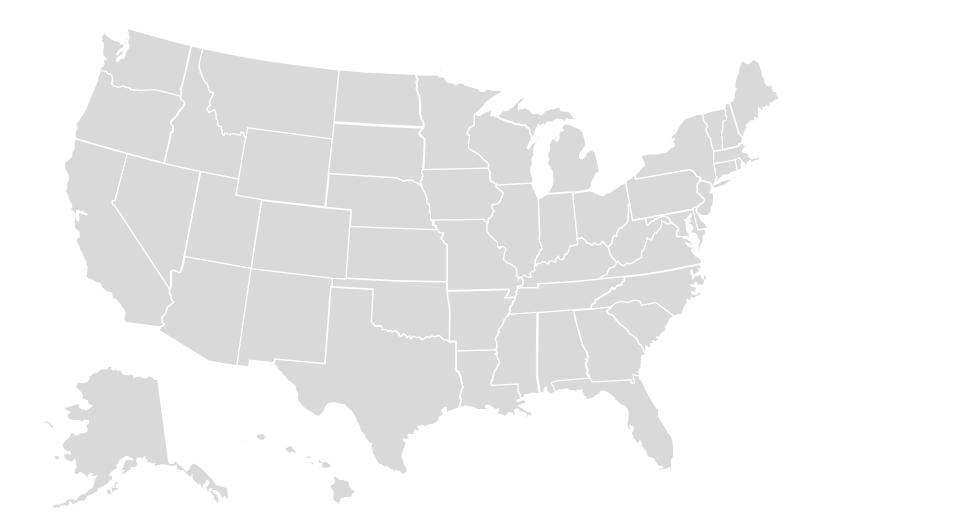an average user from China

USA vs CHINA

7 hrs

per week in PUBG

16 hrs

per week in PUBG

INDIE COUNTRIES

By players

1. USA

2. China

3. Russia

4. Germany

5. UK

6. France

7. Canada

8. Brazil

9. Poland

10. Australia

By spending on indie games

1. USA

2. Germany

3. UK

4. France

5. Canada

6. Australia

7. Poland

8. Russia

9. China

10. Brazil

SUMMARY

2017 was the best year for Valve so far: more games, more sales, more gamers.

Steam sales are heavily skewed to the top, but it was always like this. We see more games joining the tail than ever and affecting averages.

Games at higher price-points make more money (duh), especially full-priced AAA titles.

There are many users from China on Steam, but they don't seem to be buying much outside of PUBG.

Steam Direct caused
a significant increase
in the number of new
titles releases but
it's nothing compared
to the Greenlight launch.

QUESTIONS?

TWITTER

@galyonkin

EMAIL

sergey@galyonkin.com

WEBSITE

steamspy.com