STEAM GREENLIGHT FOR FIRST-TIME DEVELOPERS

Explaining Steam Greenlight from a game developer's perspective

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ABSTRACT

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The purpose of this thesis is to go through the Steam Greenlight process and clarify mis-information and correct beliefs on the platform. The thesis proposes improvement ideas based on the findings of the research conducted.

Steam Greenlight was created in 2012 by Valve Corporation and determines which new games can be available in the Steam Store. Steam users can vote on games which improves the games' chances of getting through Greenlight.

Steam Greenlight has been created to enable new game developers to enter the largest PC video games market, but it seems to be unclear to novice developers. This thesis is written from the perspective of a game developer who has not published on Steam before.

As a basis for the research, personal experiences are used from producing a Steam Greenlight project as well as interviews from other Finnish game developers who have recently gone through the process. The Greenlight platform has also been researched thoroughly and quantitative analysis has been made based on the findings.

There is lots of controversy on Greenlight and findings approve that getting a game on Steam is not straight-forward and that randomness, right timing and virality all have to do with the success of the campaign. Steam Greenlight is usually the first time novice developers do marketing for their game, so the lack of marketing knowledge and working on the first Greenlight campaign tie together. The issue if Greenlight is even important at all is also tackled in this thesis.

In its results, the thesis proposes a few ways to improve the platform and knowledge what to take into account while using it as a game developer.

Key words: steam, greenlight, valve, video game development, indie, games, PC

CONTENTS

ABBREVIATIONS AND TERMS

Steam	A digital distribution, gaming and social platform for PC games created by Valve Corporation in 2003
Greenlight	An entry platform for new developers to enter the Steam Marketplace, based on a voting system and having curation done by Valve
Kickstarter	A crowd-funding platform many times associated with Greenlight submissions
IndieGoGo	A crowd-funding platform
Indie games	Games whose development do not rely on a publisher's financial support. Usually distributed digitally.
Viral	An adjective for describing something that becomes popular through Internet sharing.
TOS	Terms of Agreement.
Reddit	One of the world's largest discussion forums mainly consisting of North American men aged 25-35. Contains a lot of content on video games and pop culture.

1 INTRODUCTION

Using Steam Greenlight is the most popular way of getting an indie game out to the big PC video game markets today. Because of Steam's influential position in the gaming market, its influence on the indie games it publishes make a great impact. Having launched in 2012 with a lot of excitement, thousands of games have gone through the platform and many of them have been published with success.

However, Greenlight's methods could be improved. This thesis is aimed at new, first-time users of Steam Greenlight, but it will also give insight to seasoned developers and present information about Greenlight clearly and informatively.

Game development is a growing industry with total revenue going up from 10.4 B from 2009 to 46.5 B in 2014 (Johnstone 2009; Statista 2015). Even though the mobile industry is booming, the trend has changed for indie developers. Indie development is heading back to PC and Steam's importance to a team's success is ever-growing (Crawley, 2015). Steam has an almost monopoly-like position in PC distribution and is responsible for choosing which games enter its markets. The thesis will look at Steam Greenlight from the eyes of a developer who is developing their first game for the PC market.

Is randomness a factor? Is Greenlight clear enough for new developers? Is Greenlight necessary in the first place? These questions are matters answered in the thesis.

Various game developers from Finland who have gone through the same process of getting through Greenlight have been interviewed for this thesis and their opinions have been used on forming conclusions.

2 STEAM GREENLIGHT

2.1 Introduction to Steam Greenlight

Steam Greenlight is an entry platform for new game developers inside the digital distribution platform Steam created by Valve Corporation.

Steam Greenlight's purpose is to allow the Steam user base to choose and vote which games are accepted to be sold in the Steam store. Users vote on items on the Greenlight page and with enough votes a game can be 'Greenlit' by the community.

PICTURE 1: View from a product page in Steam Greenlight (Screenshot: Steampowered.com, 2015)

In 2012, Greenlight was added for users to pledge the games they wanted for to enter the store and after a certain amount of votes the game would go through the standard Valve acceptance procedure (Caoili 2012). Prior to Greenlight, any developer could submit their game straight to Valve for approval. Greenlight does not necessarily ensure a place in Steam, since Valve still hand picks the acceptable submissions.

During the start of the service, any user could submit an item to the Greenlight page and it was shortly followed by a large amount of joke submissions. Only 5 days after the launch of Greenlight, Steam added a one-time 100$ registration fee for new submitters to cut down on the excessive amount of submissions done in the service. (Cifaldi, 2012)

In January 2013, Valve recognized that enough games were not getting Greenlit. As a change of direction, they immediately Greenlit 100 games and announced the Discovery update in September 2013, which made it easier for users to recommend and vote for Greenlight submissions as well as see user-recommended submissions. This made it relatively easier for developers to get through Greenlight, since more submissions were getting accepted. (Graft, 2012)

By January 2015, 1955 games had been Greenlit on Steam and by September 2015, 5200 games had been Greenlit. Around half of the Greenlit titles have been released on the Steam Store. (Steampowered 2015)

2.2 Steam Greenlight as the #1 entry platform for Indie developers

Steam does not release its sales stats, so it is difficult to estimate its market share - the newest figures are from 2012. IHS Screen Digest estimates Steam to have had a 75% market share, generating $1.1 billion from full-game downloads (Edwards 2013). In 2015, the games market in Steam was worth $3.5 billion, but it is not known what the market share was. (Morrison, 2016)

However, the rise of Steam can be seen from the rise of concurrent users, which is public information for all users. On January 2nd 2015, Steam hit 8.5 million concurrent users, compared to the 7 million in December 2013 and 6 million in 2012. On January 3, 2016 it hit 12 million. That is a nearly 72 percent increase in only three years. (Morrison 2016.) These numbers clearly show a trend of the rise in the Steam platform, but also PC gaming in general because of Steam's large market share percentage - PC gaming trends can be seen inside Steam.

Steam is not, however, the only digital distribution platform for digital games. Platforms such as Origin and Battle.net are large, but are limited to the companies' digital games of their own and are not open for indie developers.

Because of Steam's large market share in the digital games market, there is no direct competitor using the same service model for delivering games. For indie developers there might be other options to sell the game somewhere else than Steam to target a specific audience. GOG.com is a possible option for small indie developers as well, but the DRM (Digital rights management)-free requirement for all games makes them prone to pirating and illegal sharing. Steam has a built-in DRM-system that does not allow users to copy their games forward or play them on a device that does not have Steam. On DRM-free platforms a game can be burned onto a disk, or shared via torrent services since it does not have a service preventing it from being played. It is not completely a negative issue: some users prefer to buy their games DRM-free and do not need to worry about signing into any services before playing. However, games are not completely invincible from pirating on Steam either. GoG does have the advantages of a smaller platform: those who use it will more likely hear from your game, in contrast to Steam, where it might get buried. Entering GoG is straight-forward: sending a message to the GoG team and requesting to let the game into the store. The same applies to other similar services, such as itch.io and Desura.

A developer has other means to sell their game outside Steam, but it will require the audience to find the game there as well. There are multiple successful titles that are not available on Steam and do not have their own distribution channel such as such as Guild Wars 2, League of Legends, Smite and World of Tanks. There are also indie titles that have not needed Steam to succeed: Dwarf Fortress, Minecraft (which started out as an indie game) and its precursor Infiniminer to name a few.

As seen by the constant growth of Steam from the rise of concurrent users, consumers are not ready for fragmented gaming purchases, where games are bought from numerous different services and not managed in a larger service. Steam even provides support for playing non-Steam games on Steam (Steampowered.com). Steam nurtures the collector nature of people: gamers like to see their collection in one place. Becoming totally independent by having the only purchases available through the developer's own store might be a huge risk - there are no guaranteed visits to the site.

According to the Steam website in January 2015, it offers a steady 70% margin for developers from sales, compared to the classic 30% that traditional publishing deals can offer (Chiang, 2011). When there is no need for physical copies, all of that 70% margin goes for development purposes. Before the rise of digital distribution which started to grow rapidly in 2004 (With Steam, Origin, GoG, Gamersgate and Games for Windows Live launching), using publisher deals were a lot more usual, although direct sales did exist back then as well.

A new, rising digital platform is the Humble Store where the developers are given a 95% share of the sales revenue (Senior, 2013). Humble Bundle is a collection of games, usually bundled under a theme. The theme can e.g. be games with great audio design or games related to history. Games in Humble Bundles receive 75% of revenue but if they are submitted to the humble store, the percentage is lifted to 95%. These games usually provide Steam keys as well. Developers can use these Steam keys to enable players to play the game on Steam but getting a better share of the revenue.

Even though Apple and Google Play offer the same 70% margin for app developers on mobile, most of the games that are developed for PC markets cannot be transitioned to mobile because of complex controls, performance or just the game design not fitting mobile platforms in general. If an indie developer wants to develop only for the PC markets, these do not apply.

Having a track record of a successful indie game can give a huge boost to Greenlight and Steam sales in general because of the added viral value of the submission. After a developer has gone through Greenlight once, they can submit new games without the Greenlight process.

After the Greenlight process, the developer has to support the Steamworks platform, which include but are not limited to micro-transactions, retail support, cloud saving, achievements, matchmaking and leaderboards. Although all of these are not compulsory, they provide value to the end user and is highly recommended by Steam to implement them. The basic Steamworks features are compulsory and the game cannot be released without them. Apart from that, the developer will discuss royalties and other details with Steam and it will go through review before it's available in the store.

2.2.1 The Greenlight process

After paying the $100 fee to Steam, the developer can submit a product brief to the Greenlight page. Greenlight does not require a playable demo for submission. Users can vote 'Yes', 'No' or 'Ask Me Later' when asked if they would be interested in buying the product. The developers can track metrics from the statistics view to follow on the Greenlight process.

PICTURE 1. Greenlight metrics only shown to the developer (Steampowered.com)

Games are ranked by a number percentage on the way until reaching the top 100. On reaching 100%, the game will most likely be Greenlit shortly, but some games have also been Greenlit before reaching the top 100. No-votes do not count towards the goal or do not affect the outcome of the Greenlight campaign.

2.2.2 Votes transitioning into sales

There is no found correlation between the quickness of Yes votes transitioning to fast sales.

Both Broforce developer Ruan Rothmann and McPixel developer Sos Sowoski advised to have a product ready when entering Greenlight, which is not the case for many Greenlight submissions. Valve's guidelines are maybe not the clearest either - although developers are recommending to almost finish the game before Greenlighting it Steam also allows quite unfinished submissions. By making it clear for developers to submit the game only when it is near completion - many indie developers wouldn't wonder why their great game idea and concept isn't getting Greenlit. Without traction from the outside it might be difficult to gather up a fan base from only users from random votes inside Greenlight rather than people who have specifically come to Steam to vote for the game. (Rothmann 2013.) Rothmann also noticed that every time they did an update for their game Broforce during the campaign, votes went up. So a lack of votes does not mean it's automatically a bad game - but many users vote only when the game is near completion. (Rothmann 2013)

PICTURE 1: Broforce, the first title from the indie team Free Lives gained a lot of success on Steam Greenlight and was featured on the Steam front page at its launch. (Screenshot: Steampowered.com, 2015)

The typical path for a Greenlit game is to launch it in Early Access, which was created in March 2013. Early Access is a way for developers to have the community involved in the development process by launching the game unfinished with a lower price. By launching the game before it is finished the developer can already gather sales and audi-

ence to complete the development of the game as well as gather ideas and suggestions from fans. However, because of failed Early Access games users are very reluctant to use money on a game that is not finished, so a crowdfunding campaign might provide more useful than launching too early on Early Access. For example, the game Towns gathered over 2 million dollars in sales in 2014 in Early Access, but the developer quit developing the game and left the community with a buggy, unfinished game (Schrele, 2015). These incidents take away credibility from Early Access games, and Valve even ruled in autumn 2014 that games entering Early Access should not promise future features that are not yet implemented and urged developers to only enter Early Access if the game is actually being developed (Yin-Poole 2014).

2.3   Greenlight Criticism

Steam Greenlight has received its fair share of criticism during its time. The largest frustration from developers has been the non-transparency of the approval system. The big question of 'HOW' is mostly asked by developers who want to develop - not spend huge amounts of time figuring out Steam's way of working and manipulating the Greenlight system.

Valve's CEO Gabe Newell declared already in early 2013: "We could just do away with Greenlight completely, because it was a bottleneck rather than a way for people to communicate choice." (Graf, 2015.) Clearly Valve itself is not satisfied with their own service but by September 2015 the issues still had not been fixed. According to the Newell's statement, it might lead to a complete new system - Valve has been secretive about Greenlight and coverage even in Steam has been kept minimal. In 2012, Valve showed new Greenlight entries even on the front page of Steam, which has millions of users browsing it every day. Games that got the feature managed to get thousands of users in a day (Polson, 2012).

Ideally, Greenlight should support itself and gather users inside Steam to find the submissions - however many indie developers have seen that with only Steam traffic, submissions get around 1000-1500 yes-votes in total and slow down in a few weeks drastically when the submission leaves the first page of Greenlight. This could be clearly seen for example with the Greenlight submissions Stardust Galaxy Warriors and Ancestory. As Polson writes in his article, most developers pleased in Greenlight have gotten their

traction elsewhere: the game Secrets of Grindea (a co-operative old school RPG) got their attention from Reddit - AirBuccaneers (an action strategy RPG) from a feature from popular YouTube streamer TotalBiscuit and Contrast from a Steam front page feature. These are impossible to predict - and having a solid, working game might not be enough to get through, even though most user comments are positive. For example, the Greenlight submission Stardust Galaxy Warriors got around 3500 page views, of which 2300 votes, which means that a rough 65% of users who end up on the page vote on the submission. Out of the over 60 comments, all but two were positive. The game after those stats had a long way to getting Greenlit, having only a 25% way done until 100%. Having only to rely on heavy external traffic to the Greenlight page takes a tremendous time from developing.

Overall, Greenlight works from a consumer perspective. Users can vote on multiple items - and it is done seamlessly through the same client the users play games on. All the information about the title is in one place. Although Greenlight's goal was to make a community choice of what it chooses to enter its system or not - it is still in a situation where Valve decides what actually enters their platform since they are still manually picked.

Greenlight having a very strict barrier of entry puts PC developers in a much more difficult role than mobile developers. This makes it even more of an issue because Steam is a clear monopoly on the market with its over 75% market share as mentioned in chapter 2.2 and dictates the game selected while the iOS and Android markets accept almost all submissions.

The discussion goes in two directions - a part of users want Steam to be a fully open platform - curated by the users, and the other part to keep the Steam selection process to be as closed as always, to allow only quality content on the platform. In the end it's about an issue of trust: if Valve trusts its users to curate the platform and create special storefronts for users to browse, they could even get rid of Greenlight completely. The best thing Steam is doing now is keeping up quality control and giving users information on quality content. If user curation can tackle these things effectively - Steam would have every reason to reconsider their heavy dictatorship-like selection of submissions, games, features and sales.

3 ANALYSIS INSIDE THE GREENLIGHT PLAFORM

3.1 Quantitative analysis of Greenlit versus Non-Greenlit titles

An effective way of analysing Greenlight content is comparing Greenlit content to non-Greenlit content. The quality of a game is a very subjective matter which is why it is left out of the analysis. The quality of the game cannot be forgotten though - While going through Greenlit v non-Greenlit titles there is a very noticeable change in quality and polish level. It seems like most games that have been Greenlit are near completion. These analyses will, however, take into account different things which are not subjective matters and can be analysed quantitatively.

3.1.1 General statistics

Seven statistics were chosen to be tracked from each Greenlight title. The statistics were chosen to reflect various and different factors of a Greenlight campaign. The numbers are averages of 30 non Greenlit and 30 Greenlit titles.

Greenlit vs Non-Greenlit statistics (n=30)

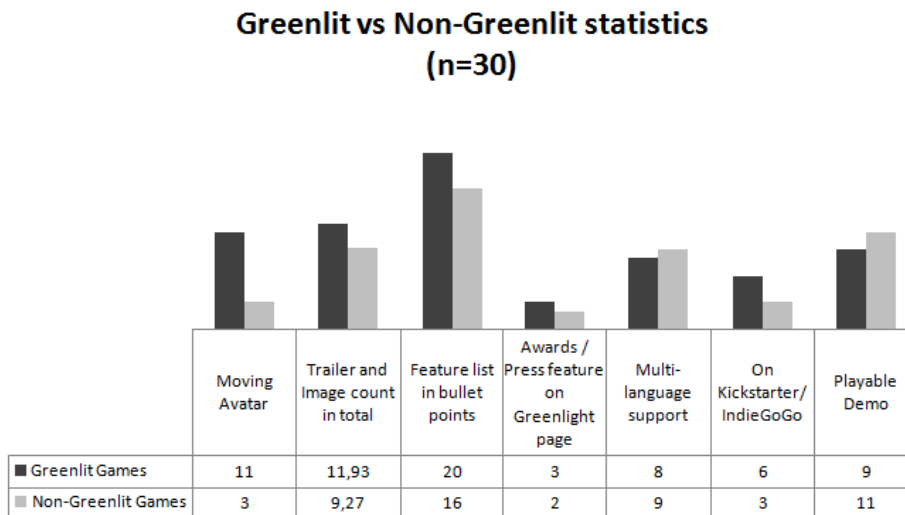|	Moving Avatar	Trailer and Image count in total	Feature list in bullet points	Awards / Press feature on Greenlight page	Multi-language support	On Kickstarter/ IndieGoGo	Playable Demo
■ Greenlit Games	11	11,93	20	3	8	6	9
▨ Non-Greenlit Games	3	9,27	16	2	9	3	11

FIGURE 1. 30 Greenlit titles compared to 30 non-Greenlit titles. (Steampowered.com, 2015)

As seen from the figure, only two notable differences can be seen. Greenlit games have a moving avatar more frequently and also have a presence on a crowd sourcing site. This can be analyzed as a causal connection: Greenlight submissions that are polished, planned and present actual game play, also result in the campaign having a crowd sourc-

ing campaign and polished visuals. It does not necessarily mean that creating a crowd sourcing campaign out of nothing will increase the chances of getting Greenlit.

The rest of the figures are close to each other, and conclusions cannot be made from them. In general, Greenlit submissions have, in average, a bit more content but otherwise the results do not provide any useful information for developers to think about for their submission.

It can be concluded that the Greenlight submission content in terms of quantitativeness does not reflect or give accurate information for succeeding in a Greenlight campaign.

3.1.2 Genres

Having not seen any significant differences between the actual Greenlight content, it should be tested if the game genre has a difference in getting the submitter through Greenlight.

Since submitters can submit as many genres as they want, Only the main genre is taken into account. Therefore there might be some slight inaccuracies in the Action and Adventure genres since almost every submission that was either of them was both.
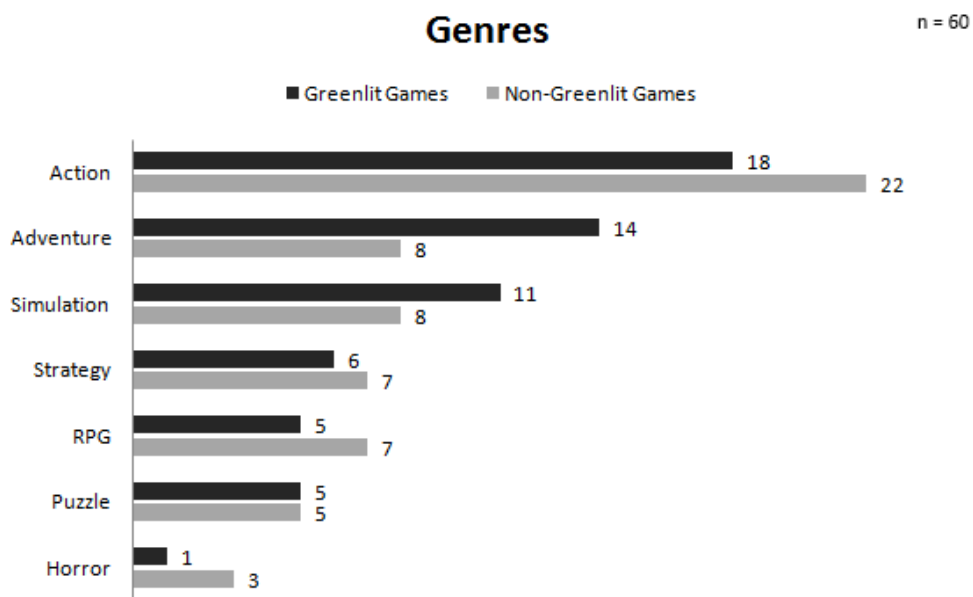

FIGURE 1. Comparison of genres of 60 Greenlit and 60 non-Greenlit games (Steampowered.com, 2015)

As seen in Figure 1, there is no clear differences between Greenlit and non-Greenlit games according to genre. There is a straight correlation between the genre distribution in Non-Greenlit Submissions and Greenlit games. It does, however, show that the general Steam audience prefers action and adventure games, and penetrating with lesser-used genres might be more difficult.
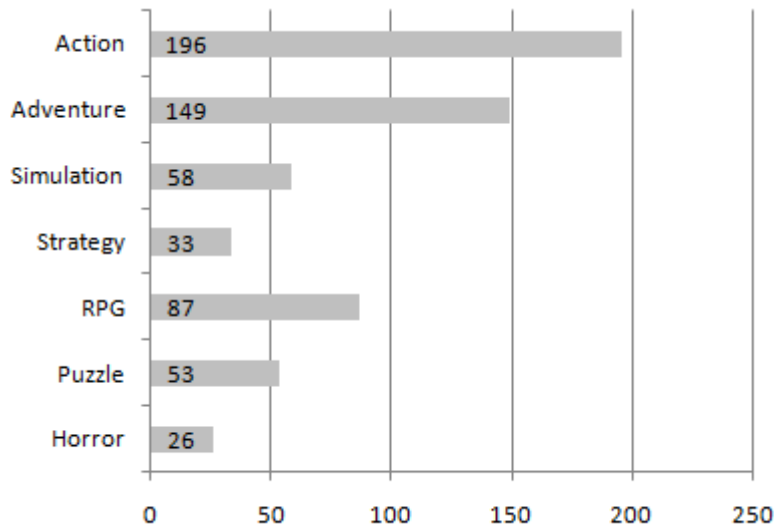

FIGURE 2. Genre amounts shown in Steam Store in the category "Indie" (Steampowered.com, 2015)

The amounts used in Figure 2 are taken from the Steam Store data on the 11th of November, 2015. The numbers are the amount of pages there are of games in the store for each genre.

Comparing Figure 1 to Figure 2, it can be seen that Greenlight favours strategy and simulation games, and under represents RPG games slightly. Whether this is an issue of RPG games being harder to develop by indies than simulation games or if the Greenlight audience favours simulation games more, it cannot be deducted from the figure. However, it is important to note that there is favouring among genres.

3.1.3 Player Options

The player options were defined by going through 60 Greenlit and 60 non-Greenlit titles and defining the player options for them. The study was conducted to figure out if Greenlight is favouring single-player games over multiplayer ones.

Player options n=60

■ Non-Greenlit Games ■ Greenlit games

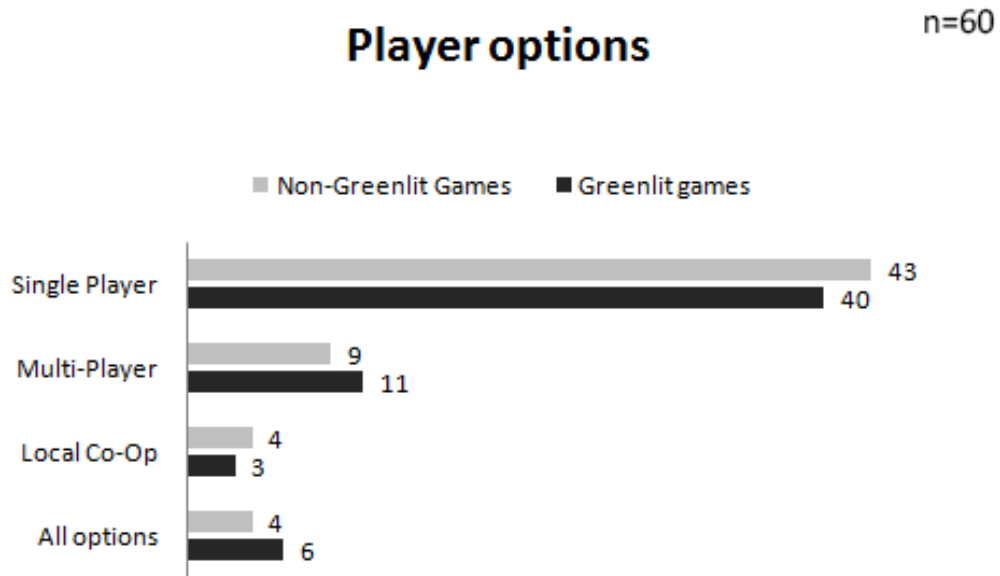|	
Single Player	43 / 40
Multi-Player	9 / 11
Local Co-Op	4 / 3
All options	4 / 6

FIGURE 1. Player options of 60 Greenlit and non-Greenlit titles (Steampowered.com, 2015)

Most of the games in the Greenlight platform are only single player games. But as in the genre comparison, the correlation between submissions and games getting through is almost equal.

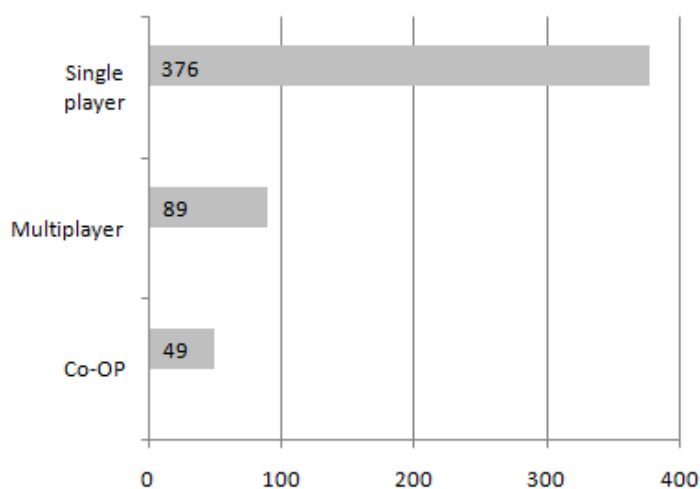|	
Single player	376
Multiplayer	89
Co-OP	49

FIGURE 2. Player options in the Steam Store under the category "Indie" (Steampowered.com, 2015)

Figure 2 shows the amount of pages for each player type in the Steam Store as of 10th of November, 2015. Compared to Figure 1, there isn't any favouring in terms of single-player versus multiplayer content. The amount of multiplayer games in relation to single player games is almost exactly the same in both Greenlight and Steam Store.

3.1.4 Conclusion

Having analysed Greenlight submissions by genre and player analysis and with taking into account the submission content, there is not a clear difference to be seen inside Greenlight. Generally the percentages are the same of how many games have certain types of features.

It seems that there is no direct way of seeing if Greenlight voters 'favor' a certain genre in comparison to games that have already been Greenlit. Even though there is a large mass of single-player adventure/action games, they also have the most competition and are represented in the same amounts in the Steam Store. It can be seen that Greenlight has slight genre favouring, but there is effort to be done outside the Greenlight platform and analyse the platform qualitatively.

3.2 Qualitative analysis

Having seen that quantitative analysis of Greenlight titles does not really provide any information on actual ways to get through Steam Greenlight it is better to conduct a qualitative analysis of the games. Even though a moving avatar is much more likely in games that have been Greenlit, it probably isn't a reason why a game has been Greenlit. A moving avatar will generally just point towards a more polished outlook of the Greenlight submission, which is a highly important factor in Greenlight submissions compared to the quantitative method used. The following chapter will elaborate on the importance of a polished Greenlight submission.

At a glance, most of the games on the submission page compared to the Greenlit page look very different in their quality level. Greenlit games generally have a cohesive aesthetic, a well-written introduction paragraph and the trailer videos and images are of high quality and obviously plenty of production time has been used on them. Submis-

sion games are still undone, and although a demo might be playable they are in a state that in game development might qualify at most a pre-alpha or more realistically a first playable. So even though the metrics might look the same, the level of detail used to create them is very different.

However, the users do not know if a game is finished or not on Greenlight, only if it looks finished. Since Greenlit games generally have a higher quality level, developers should focus on creating a strong marketing image for the game instead of showing all the working features.

Then again a game like Earth: Year 2066 was Greenlit, and with a 20$ price tag it is an unfinished, unplayable product that got through the process (Hernandez, 2014). This shows a big flaw in the Greenlight process: many games are let through and the quality control is weak.
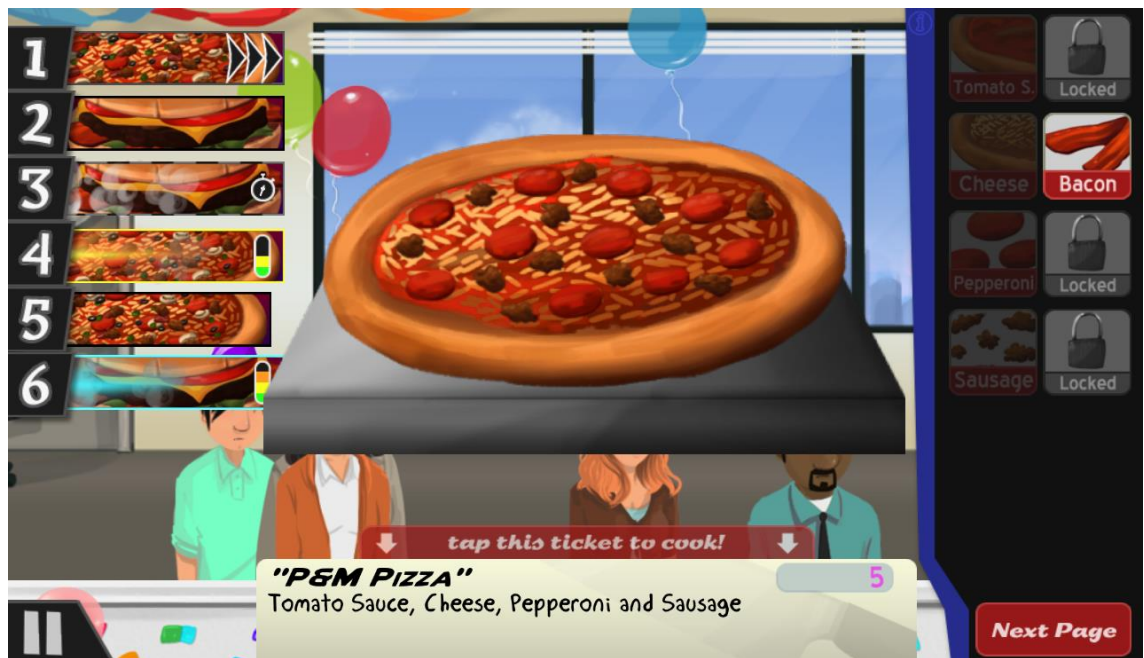
PICTURE 1: Cook, Serve, Delicious was originally a mobile game before going through Greenlight to enter Steam. (Screenshot: Google Play Store, 2015)

On the contrary, the game "Cook, Serve, Delicious!" had been out for a year on iOS and Android but had not gotten through Greenlight. When it suddenly got Greenlit, The developer quickly added Steam features - and after publish it gained 130 000$ in gross sales in the first three months in Steam. These occurrences are unacceptable in a plat-

form which dictates the sales for an indie developer - the developer had grossed approx-
imately 1500$ a month before getting on Steam. (Galindo, 2014)

4 GREENLIGHT SPECIFIC EXTERNAL MARKETING

4.1 Introduction

As seen in the analysis inside Greenlight, there is not a remarkable difference when data is measured in a quantitative way. Even though it can be seen that the quality of the game has a large impact on it getting through Greenlight - it is not the only thing making a difference.

Gathering a crowd can be done in various ways: although modern internet culture seems to favour accidental fame: a developer is more likely to gather traction if someone else markets the game instead of people actually connected to the developers.

Creating Greenlight material is also general marketing for the game, and it might be the first time for the team to create any marketing material for their game. This is a larger problem with developers who are making their first game: not seeing importance in marketing and seeing it as a big struggle and it being something 'extra'.

4.2 Stealth marketing

Stealth marketing is one of the most effective ways of marketing (Kaikati & Kaikati, 2004). A word-to-mouth type of approach can allow penetration in social sites like Reddit, since straight marketing is not allowed. Stealth marketing should not be confused with virality, however, since stealth marketing is done consciously by the developer.

4.3 Traditional Marketing

Traditional marketing such as printed media or TV advertisements are ineffective and expensive for marketing a Greenlight game. Sites like Reddit do not accept marketing from companies and the community does not encourage it. Usually indie developers do not have the money to market to an extent where it would be useful. Traditional marketing is expensive and targeting medias such as newspapers, flyers or even trade shows is farfetched since most of the audience for Steam games is online.

4.4   Improving Greenlight voting numbers

Greenlight submitters have even teamed up and created voting circles, where you vote on people's submissions, and you are voted on. (Grayson, 2014) This reflects the odd state of the platform today - even games vote on each other to get through the platform. This type of behaviour has nothing to do in gaining community, future sales or concept validation, just pure votes. Although the votes might be effective, the vote numbers might only shift a few hundred votes so the amount of work needed to get the votes is larger than the outcome.

4.4.1   Virality

Virality seems to be the largest factor in "super popular" Greenlight titles. These games get tens of thousands of votes, are spread through multiple gaming sites and social media as well as attract a lot of Steam user attention. Greenlight games such as Hatred and Bro Force gained a huge amount of traction to their game without much effort of their own. These games were Greenlit in less than a week and gather attention on various platforms on the internet. The question is, though, would they have gotten through even without virality - would only Greenlight votes have been enough?

Reddit user and game developer Elyot had posted on the '/tifu' subreddit, where users can post fails made by themselves. He explained how they had lost their mailing list at a game expo and how all their marketing costs had been used in vain. Reddit users quickly responded with support and signed themselves up to their mailing list, gaining a 1100% increase in their mailing list size. The game developer had not asked for anyone to sign up, people asked for the link themselves. (Reddit user Elyot, 2014)

This illustrates a phenomenon linked to internet virality: it happens easier when the developers themselves does not ask for it - rather the internet community feels that they deserve the popularity.

4.5   Gaining marketing traction through Greenlight

Although developers will have to look outside Greenlight to market their game, the game itself on the platform can generate a lot of organic traction and give much larger visibility to the game when it's on Greenlight. Greenlight can act as a general source for new, early-in-production content that news sites and websites can use. For example the game Hatred gained most of its virality through Greenlight itself.

5 GREENLIGHT EXCPECTATIONS AND REALITY

5.1 Case: Stardust Galaxy Warriors

Stardust Galaxy Warriors is a local multiplayer to be played with friends in the same place for up to four players. The development of the game started in August 2014 with a team of 8 students from Tampere University of Applied Sciences. As seen in figure 2 in 3.3, local co-operative games are not very popular on Steam compared to single player games, but they are getting accepted through Greenlight in correlation to Greenlit games with co-operative play as an option.

PICTURE 1: Stardust Galaxy Warriors is a side-scrolling shooter with multiple game modes. (Screenshot: Steampowered.com, 2015)

The Steam Greenlight campaign was planned for the beginning of December 2014 and was released on schedule attached with emails to press with the Alpha build as well as a new video, website and a post on the team's active IndieDB account. Stardust Galaxy Warriors (referred as SGW) gathered about 1000 votes in the first few days and slowed down rapidly after the first weekend.

SGW marketed in various ways: Game expo, IndieDB, Facebook, Twitter and got a few features on Indie game dev websites as well. However, it experienced a very slow Greenlight campaign.

There were various issues that contributed to the slowness of the Greenlight campaign. The game was not in a finished state. It was in pre-alpha stage and as the studies showed, it should have waited for a more finished state. The game did not represent a popular genre on Greenlight, which is the action-adventure single-player genre. The team had also not planned any marketing for the game and all marketing materials were created in quite a quick manner.

It would have been better to wait until the game was more finished to secure a more stable Greenlight campaign. A reality-check during the pre-alpha stage of the game would have indicated if the Greenlight campaign is something the team would have wanted to use time for.

5.2 Stardust Galaxy Warriors expectations versus reality

As a developer, it took a lot of time to prepare for the Greenlight campaign. Optimizing all content, texts, pictures and making a trailer took a big portion of the development time - time that could've been used developing the game. The expectations were to start gathering a community around the game but it soon was clear that Greenlight was not a place to do it - unfortunately it was noticed too late. The Greenlight campaign was decided already few months prior and the team had a strong feeling that it was needed. There was not much criticizing if it actually had to be done in the first place. On the other hand, the team had the chance to work on a polished version of the game which could be used to generate traction and to be sent to press.

Since Greenlight votes cannot be seen transitioning into sales, Greenlight is more important to the developer than the consumer. Since Greenlight is being marketed from a consumer perspective, the expectations of the developer are set too high. The SGW team noticed this as well: since Greenlight does not really give the audience and virality it might seem to give, it would have just been better to postpone the campaign until the game was nearly in a finished state.

The SGW team was a developer team with no prior experience to PC publishing. In these cases, the developers put a lot of effort into the Greenlight submission, since they see Steam as a highly important platform for their sales. Naturally, they will also put

effort in anything related to Steam, because the developer does not want to risk anything regarding the future of their game.

Arguably, the shoot-em-up genre in Steam is extremely hard to succeed in and the team had lacked proper understanding of the target market while developing the game. Jamestown is one of the only successful western shoot-em-up titles on Steam, while there are multiple games from other genres that have been successful. The sluggish Greenlight process had correlation with the sales of the game as well. In March 2016, the game had around 30 reviews (albeit positive) which in turn might reflect the amount of sales for the game.

5.3   Developer interviews

The developer interviews have been taken from game developers who were all new to Greenlight and had not published on Steam before.

A poll was conducted on three developers responsible for their Greenlight campaign: developers of Hive, an RTS game (Sauli Saarimaa from Skydome Entertainment), Parcel, a puzzle game (Pyry Takkunen from Polarbunny) and Ancestory, a real-time card game (Tatu Teittinen from Kajak Games). All got through Greenlight quite quickly, Parcel and Hive in less than a month and Ancestory in less than two months. The study was conducted after each developer had gotten through the Greenlight process.

I think that...	Parcel	The Hive	Ancestory
Greenlight is a valuable platform for validating a game concept		x	
Greenlight should only be used when a game is very near completion			
A successful Greenlight campaign will result in successful sales			
The Greenlight process feels uninformative and confuses the developer of their standing	x		x
Virality has too much to do with getting votes	x		x
Virality is random and cannot be controlled	x		
A successful campaign requires too much time from the developer	x		
Greenlight isn't very well marketed in Steam	x	x	x
Greenlight seems to favor certain genres of games	x	x	x
The more near completion the game is, the more likely it is to get through Greenlight	x	x	
With the right marketing, any kind of game can get through Greenlight	x		x
Steam should not curate submissions - Greenlight status should purely be based on votes			
There are too may submissions flooding the Greenlight page	x	x	
Steam should do quality control for Greenlight submissions	x	x	x
In afterthought, our team should've waited until the game was in a more finished state			x

FIGURE 1: Developers were asked to complete the sentence from a predefined list

Analysis will be focused on the points that all the three developers shared.

Everyone felt that Greenlight is not very well marketed on Steam. As mentioned before, the last time Greenlight was mentioned on the Steam front page was in 2012. This affects the virality of Greenlight campaigns: if no one finds the submissions in the first place (other than the Greenlight regulars who visit Greenlight ofern), it is hard to break through.

Compared to the Stardust Galaxy Warriors case, however, The Hive and Ancestory did not feel that the campaign took too much time from the developer. Whether the team has a specified marketing person or not does affect the feeling of the Greenlight campaign taking a lot of time.

All three felt that Greenlight seems to favour certain genres of games. Based on the earlier findings from 3.1.2, it is in correlation between the general Steam demographic. It might feel though, while browsing through Greenlight submissions that it is very heavy on single-player adventure games and submitting a game not belonging to that genre might make the developer feel different from the crowd. However, a unique game can pop out from the sea of similar-looking games.

It was agreed that Steam should still continue doing quality control, like it has been doing so far. Making the platform completely open was not an option for them.

5.4 Developer interviews: expectations versus reality

Another series of questions was asked to see what the developers were expecting from the campaign, and how they felt after it.

Before entering Greenlight, what did you expect from a successful campaign?	Parcel	The Hive	Ancestory
An active user base excited on the product		x	x
Validation of the game concept	x		x
Virality			
Opinions on the game from voters	x		x
Greenlight is simply a way to get the product one step closer to the store	x		x
Greenlight is a very valuable step in the product's process to become a hit		x	

FIGURE 2: Responses from the three teams to the question: Before entering Greenlight, what did you expect from a successful campaign?

Figure 2 shows that the developers' expectations were quite different and most of them saw the platform as a simple validation process that takes them closer to the Steam store.

After getting through Greenlight, what did you actually get?	Parcel	The Hive	Ancestory
An active user base excited on the product		x	
Validation of the game concept		x	x
Virality			
Opinions on the game from voters		x	
Greenlight is simply a way to get the product one step closer to the store	x		x
The actual Greenlight campaign was very valuable			

FIGURE 3: Responses from the three teams to the question after getting through Greenlight, what did you actually get?

Parcel and Hive agreed that Greenlight does not give any long-term community or interest from voters - after getting through Greenlight only few supporters stuck with them. The two figures show that the expectations varied from the reality, while the other did not expect validation for a game concept and got it, another one had it the other way

around. This can be seen as confusing information from the Steam side: the developer sees what they want to see from the platform.

None of the developers saw the Greenlight campaign as valuable, while they had expected an excited user base and opinions on the game from voters.

5.5   Conclusion

As a conclusion from interviews as well as personal experiences with Greenlight, its fundamental problem is that many new developers expect Greenlight to be a tool for validation if the game concept would sell. Game developers who have already published games see the process as simply a walk-through, where they do not place much value on the submission process.

Also, according to the interviews, different developers see the Greenlight differently, expect different things and there seems to be only small common ground. This indicates communication issues from Steam's side. Overall, major conclusions cannot be made from individual opinions and a small sample size, but they strengthen the statements made in the thesis.

6   IMPROVING THE ENTRY PLATFORM

6.1   Improvements to the platform

Game developers who place value on the process are usually starting developers who do not have experience on video games publishing in general. They see Greenlight as an important platform for idea validation and fan-base creation, while senior developers do not place much value on it since they understand Greenlight is just a part of their marketing plan on a larger scale. Greenlight's structure is made in a way that makes junior developers believe of its importance: Active commenters, quality submissions, flashy animated avatars. In the end, it takes a lot more time to generate a Greenlight campaign compared to seasoned developers since starting developers might not plan marketing or place it on the priority lists.

Steam has two ways to go with their Greenlight platform. One, as previously mentioned, is an open platform where anyone can submit content. The problem is how to make sure the worthwhile content is featured, or make the content that's most relevant to the user visible to them. In this case the Greenlight process should be clarified to new developers. It comes down to the point if Greenlight is necessary at all if there is no clear transition to sales from successful Greenlight campaigns.

On the other hand, gamers have always felt Steam as a quality platform with strong curation and now with Greenlight letting games through that are definitely sub-par to Steam's quality level Steam is in a very conflicted state. Since Greenlight voters are not obligated to buy the game they vote, the voting system does not indicate how well the game is going to sell - neither how 'good' the game actually is. The problem in curating games, though, is that there is a dictator-like decision making which decides a 'goodness' of a game. And when there is no shelf-space, it might not be the route Steam wants to go.

Should Steam go back into their way of curating all content like before Greenlight? We would have quality content, but maybe viral games that have made a large impact might have not gotten in (E.g. Simulator-game overload in 2014, where developers released and Greenlit various Simulator-suffixed games). These type of games are the richness

that PC gaming gives to players and especially when having a monopoly system Steam should allow all games that do not break the law or Steam's own TOS.

On the other hand, quality games do not have a large problem with Greenlight. Since most starting PC developers will have their first published game debut on Steam, a lot of misconceptions already arise from just being a novice to game publishing in general.

6.2   Greenlight Conclusions

Is Steam there to say what people should sell or not? In the end, Greenlight is a small factor for all there is to Steam and selling games digitally. As seen from the examples mentioned in this thesis, even games with pre-sales or with a proven market might need to wait for a year to get published and fad-games which people might not even buy get pushed ahead on listings. Right now Greenlight is in the way of the world's largest digital games distribution market with its illogical ways of behaving and leaving some developers to wait months and months for their product to go through.

In a culture where timing is important, developers do not always have time to wait months to sell their game. For developers the best option is to make a streamlined, quick process where the end user can validate if their game is a reliable product or not. Steam's strength is its huge customer base - and curators that players respect and agree with such as Totalbiscuit or other gamers that have a lot of respect from their fans. Using these curators as an advantage - creating 'mini-stores' or highlighting content specified for different groups of players would allow for an open platform but not flood them with games they are not interested in.

Indie gaming is not going anywhere - and Steam should respond accordingly. All video games start from the developers, and creating a clear, informative platform that fits perfectly for the developer is better for their customers as well. When developers can focus on community building and giving a unique experience for the customer from knowing the target audience they can deliver a better product instead of having to focus on Greenlight-specific things that do not give value in the long run.

6.3   Greenlight as the gate keeper for evolving gaming culture

Mobile gaming changed the video games industry, and in 2015 59% of American's played video games. Mobile revenue is expected to overtake console gaming in 2015, with 25 billion in sales in 2014 (Lofgren, 2015). When Steam was founded in 2003, gaming was very different. The target audience Steam games have originally been targeted to has grown to various groups of gamers that play different games. Greenlight is being left behind in this transition: the customers who visit Greenlight are usually hard-core gamers at their core: using their time to find to a platform that is not well marketed in Steam. Growing Steam to fit different customers would have to start from the roots: making changes to the entry platform which lets games enter in the first place.

There is also a larger scale issue with target audiences. The most active Steam users are adult men and they are the largest consumers on the platform. It is estimated that only 4% of people visiting the Steam website are female (Galyonkin, 2015). The Steam website is therefore heavily targeted for men, but it is estimated that women are already a majority in gaming with 52% of gamers being female. Most of female gamers are playing on mobile platforms, but if the largest distribution channel on PC gaming is not being targeted at female players at all, there is an issue. The potential of the female audience is huge, but it seems that women are not using the platform at all.

Greenlight, while representing Steam in terms of genres and types of games it lets through as seen in Chapter 3.1, will effectively decide which indie games people will see on the shelves of the Steam Store. Since the Greenlight service is not heavily advertised in Steam, the voting will be trusted on the hard-core Greenlight voters whose taste correlates with the general public on Steam. Those who might be interested in more casual, alternative or otherwise differing games might not find Greenlight in the first place. Seeing that single-player action games are by far the most popular genre, it will also stay so in Greenlight.

As gaming culture evolves, there is a big market for alternative games for those not fitting in the typical core- to hard core gamer user base. This can already be seen from the rising markets of mobile games targeted to various target audiences which differ from the typical PC audience. If Greenlight voters stay the same, new and exploring game

genres might not get voted since Greenlight voters will vote based on their preferences. If Steam wants to take part in evolving gaming culture, it needs to take its gatekeeper policy into consideration.

7 CONCLUSION AND DISCUSSION

The thesis' focus was on creating a cohesive and clear picture of Steam Greenlight from a perspective of a developer who is entering Greenlight for the first time. It is important to understand Steam's market dominance and the history of Greenlight so far, so the first part of the thesis was used to introduce the PC publishing market. The controversy of the platform and analysis of it also serves as a basis for the thesis.

The Greenlight process was inspected thoroughly inside the platform but also through channels externally from Steam. Internal analyses give information when analyzed qualitatively, and it was noticed that games close to finished and polished have a much higher chance of getting through. Virality and randomness will always be a factor, but it requires the game to resonate with the audience. Although fast Greenlight acceptance times might not give indication for sales, games with huge numbers such as Broforce have transitioned into large sales.

A case study from the game project Stardust Galaxy Warriors was used to provide insight from a developer perspective on the Greenlight campaign. Combined with developer interviews in the same position, it was noticed that the expectations between new developers vary widely and each developer has its own way of seeing it.

The way people perceive Greenlight and entering Steam varies wildly between user groups (Consumers, starting developers, veteran developers) and even inside categories, as seen from the interviews. Some see it as a simple step to get through, some might waste too much time on something that doesn't provide value in the end.

Steam is a consumer platform, but should consider its position from an ethics point of view: the games in the platform have a larger chance of becoming popular and gaining sales and Steam itself is responsible for the games getting through. This is highly relevant especially since the mobile markets provide a chance for almost anyone and no one is holding a monopoly-like market share, with Google Play and the App Store holding its place with competition.

Valve has many ways to go with this: if they were holding a smaller market share and would really encourage their platform to be only top-quality content, it would be under-

standable for them to restrict the user submission amounts. But as Greenlight has shown, some joke titles get Greenlit, or alternatively games already making revenue get stuck in the queue. That is why if Steam cannot objectively curate the platform, it should allow its users to do it to allow games and submissions that might not resonate with the Greenlight voting audience. Greenlight voters might not always be customers for the Greenlit titles.

In the last chapter an issue is also raised on Greenlight's role as a platform evolving gaming culture: Gaming is constantly growing traction and people new to gaming will find Steam even more often nowadays. If Steam provides users with content only a certain core audience enjoys, alternative PC games will be slower compared to what the mobile industry has done.

Greenlight isn't a problem for everyone. Some developers with a longer experience on game development see it as a part of marketing, while new indie developers might really struggle with the progress. However, is it Steam's fault that novice developers do not know how to market their game? Probably not. But it should be noted that devloper after developer is going to continue to do the same mistakes if Steam doesn't clear up the Greenlight process.

Steam is constantly letting more and more games through Greenlight and the importance of Greenlight decreases over time when any game is let through. It is time for Steam to decide what they will do: Make Greenlight clearer and more informative or get rid of it completely.

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APPENDICES

Appendix 1. Developer interview 1

Interview questionnaire (online) with Pyry Takkunen from Parcel   1 (2)

1. What is your product name?

Parcel

2. How long did it approximately take to get through Greenlight?

week - month

3. Before entering Greenlight, what did you expect from a successful campaign? (Predetermined list)
- Validation of the game concept
- Opinions on the game from voters
- Greenlight is simply a way to get the product one step closer to the store

4. After getting through Greenlight, what did you actually get? (Predetermined list)

Greenlight is simply a way to get the product one step closer to the store

5. What was the largest difference in expectations vs reality after completing your campaign?

We expected more visibility and more interest. Well, frankly, we expected at least someone outside of the Greenlight page to go "wow, I like this concept". Although we passed Greenlight with flying colors, nothing really "stuck" after that. Greenlight is NOT a way to build a community. Greenlight is a video, a couple of screenshots and a boolean query. For moderate community-building, there's Early Access.

6. What is the best in Steam Greenlight for developers?

Getting the opportunity to sell the product on Steam. Seeing how people react to the GL materials has some value in terms of marketing and approach, but not much.

7. I think that...

- The Greenlight process feels uninformative and confuses the developer of their standing
- Virality is random and cannot be controlled
- Virality has too much to do with getting votes
- A successful campaign requires too much time from the developer
- Greenlight isn't very well marketed in Steam
- Greenlight seems to favor certain genres of games
- The more near completion the game is, the more likely it is to get through Greenlight
- With the right marketing, any kind of game can get through Greenlight
- There are too may submissions flooding the Greenlight page
- Steam should do quality control for Greenlight submissions

8. In your opinion, what was executed poorly in Steam Greenlight for the developer?

Way too many titles get Greenlit. This makes it not a problem in terms of passing Greenlight, but in terms of sales. A game that might have (deservedly) gained some visiblity in more traditional, not-so-open channels might drown completely into the mass of titles not worth of anyone's time. Greenlighting so many titles so often is a disservice to both the consumers and the developers who wouldn't deserve the fate of never being discovered.

9. Other thoughts?

Like in everything else Steam (or games)-related, there's an ocean of shit preveting you from being seen, even if you're the shiniest diamond there is. Frankly, I believe our passing through Greenlight was more thanks to the ridiculous amount of Greenlit titles per batch. This saturation has brought and will bring almost everyone problems in the long run.

Appendix 2. Developer interview 2

Interview questionnaire (online) with Sauli Saarimaa from The Hive   1 (2)

1. What is your product name?

The Hive

2. How long did it approximately take to get through Greenlight?

< one week

3. Before entering Greenlight, what did you expect from a successful campaign? (Predetermined list)

- An active user base to get excited on the product
- Opinions on the game from voters
- Greenlight is a very valuable step in the product's process to become a hit

4. After getting through Greenlight, what did you actually get? (Predetermined list)

- An active user base excited on the product
- Validation of the game concep
- Opinions on the game from voters

5. What was the largest difference in expectations vs reality after completing your campaign?

To actually see how much visibility Steam offers when you release the game on Steam. Most developers rely on special discount campaign inside Steam to get more visibility.

6. What is the best in Steam Greenlight for developers?

To actually see if people want to play this kind of game and to get early feedback..

7. I think that...

- Greenlight is a valuable platform for validating a game concept
- Greenlight isn't very well marketed in Steam
- Greenlight seems to favor certain genres of games
- The more near completion the game is, the more likely it is to get through Greenlight
- There are too may submissions flooding the Greenlight page
- Steam should do quality control for Greenlight submissions

8. In your opinion, what was executed poorly in Steam Greenlight for the developer?

Steam Greenlight has lost popularity when the page is flooded with new (often "joke") titles all the time. Rock simulators might be funny at first, but people get tired on them. Also most of the "joke" games never get developed eaven when they are greenlit. People dont come so often to vote on the Greenlight games anymore.

9. Other thoughts?

Steam is still the most valuable platform for developers to release the game. It has such huge traffic compared to other stores. It's hard to get visibility on Steam without relying on the discount campaigns.

Appendix 3. Developer Interview 3

10. What is your product name?

Ancestory

11. How long did it approximately take to get through Greenlight?

Month - three months

12. Before entering Greenlight, what did you expect from a successful campaign? (Predetermined list)

- An active user base to get excited on the product
- Validation of the game concept
- Opinions on the game from voters
- Greenlight is simply a way to get the product one step closer to the store

13. After getting through Greenlight, what did you actually get? (Predetermined list)

- Validation of the game concept
- Greenlight is simply a way to get the product one step closer to the store

14. What was the largest difference in expectations vs reality after completing your campaign?

I would have expected some of the voters to check in to see some progress and follow the game in other forms of social media and at least some feedback for the game, but neither of those things really happened.

15. What is the best in Steam Greenlight for developers?

Being able to test the game concept against other games and connect directly with a possible audience. It was also a great learning experience for us in communication and marketing for games.

16. I think that...

- The Greenlight process feels uninformative and confuses the developer of their standing
- Virality has too much to do with getting votes
- Greenlight isn't very well marketed in Steam
- Greenlight seems to favor certain genres of game
- With the right marketing, any kind of game can get through Greenlight
- There are too may submissions flooding the Greenlight page
- Steam should do quality control for Greenlight submissions
- In afterthought, our team should've waited until the game was in a more finished state

17. In your opinion, what was executed poorly in Steam Greenlight for the developer?

Greenlight relies a lot on the traffic of the first few days and it's really hard to communicate progress once the game isn't on the most recent titles list anymore. The process is a bit uninformative and I personally feel that Valve should curate the process a bit more and maybe even comment on some of the titles (at least for the developers).

18. Other thoughts?

Steam is still the most valuable platform for developers to release the game. It has such huge traffic compared to other stores. It's hard to get visibility on Steam without relying on the discount campaigns.