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BUSINESS ANALYSIS REPORT

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EXECUTIVE SUMMARY

This Business Analysis Report provides an in-depth review of Niantic, a leader in augmented reality (AR) gaming, widely recognized for its flagship title Pokémon GO. It evaluates Niantic's business strategies, technological strengths, and position within the broader AR gaming market, while highlighting potential growth opportunities and addressing challenges such as rising competition and consumer fatigue in the mobile gaming industry. Niantic's ongoing success depends on its ability to adapt its strategies in response to shifting market dynamics. By analyzing market trends, competitive landscapes, and Niantic's own initiatives, this report identifies key opportunities for revenue growth, enhanced fan engagement, and improved promotional strategies.

INTRODUCTION

JACK SPICER



Jack is pursuing a degree in Game Business, aiming to understand the gaming industry from both creative and commercial viewpoints. At Full Sail University, he has cultivated a keen interest in analyzing game studios, their business models, and marketing strategies. His coursework and projects have equipped him with the skills to critically assess market trends, competitive landscapes, and industry dynamics, particularly in the gaming and technology sectors.

WHY Niantic?

For his business analysis report, Jack has selected Niantic due to its innovative contributions to augmented reality (AR) gaming, especially with Pokémon GO. The company's unique integration of digital and physical experiences through AR technology presents an intriguing case study for business analysis. Key insights from his research show that Niantic's innovation in AR technology is a competitive advantage, but it also faces challenges in maintaining long-term engagement and diversifying its product portfolio.

In this report, Jack will examine Niantic's current status and investigate potential avenues for future growth. He will also assess their business strategies, technological capabilities, and how they compare to other mobile gaming companies.



METHODOLOGIES USED:

Research + Data Collection:

Jack utilized the Full Sail Library and app analytics sites like Sensor Tower to gather research for this report. Niantic has a close relationship with the Pokémon Company and Nintendo, which are both entities that value extreme privacy in their sharing of internal data. This makes it slightly more difficult to get exact numbers for every piece of data supplemental to this report, but the app download data and various surveys have helped to shed some light on particular information.

METHODOLOGIES USED:

Analyses

- **SWOT**
- **Marketing Mix**
- **Competitive**
- **Capability**

Data Collection

- **Target Audience**
- **Value Propositions**
- **Industry Trends**
- **Product Development**
- **AR/VR Market Data**

INTRODUCTION

NIANTIC LABS



Niantic is a mobile app developer that focuses on unique augmented reality experiences for players. Originally formed as a small startup team within Google (citation needed) before establishing themselves as a private company, their games utilize real-world location data to drive physical activity and enhance players' everyday experiences. Niantic is most well known for the global mid-2010s phenomenon of Pokémon GO, but they offer several additional titles based on popular video game and movie IPs.

FOUNDED: 2010

NUMBER OF EMPLOYEES: 1050 as of 2022
(Leswing, K).

CORE BUSINESS OUTLINE

WHAT DO THEY SELL?

Niantic provides location-based augmented reality games like Pokemon GO, Monster Hunter Now, and Pikmin Bloom. These games promote physical activity and real-world exploration, enriching players' daily lives. Additionally, Niantic offers AR tools and technologies via its Scaniverse platform, enabling users to craft their own location-based AR experiences.



CORE BUSINESS OUTLINE

HOW DO THEY SELL IT?

Niantic primarily operates on a free-to-play model with in-app purchases, similar to the freemium model seen in many mobile games. The company generates income by selling in-game items, event tickets, and by incorporating sponsored locations or activities in their games. Furthermore, Niantic offers its AR platform, Lightship, as a service to other developers, creating an additional revenue stream through business-to-business (B2B) services.

SWOT ANALYSIS

Strengths

Internal & Controllable



Strong Brand Partnerships

- History of working with storied brands.
- Partnership with The Pokémon Company Intl. put them on the map.
- Pokémon, Harry Potter, Pikmin, Monster Hunter – Very big IPs



Engaged + Growing Playerbase

- Millions of active players worldwide who participate in community events.
- Continuous content updates and incentives for new players to join and current players to recruit.



Proprietary AR Technologies/Mapping

- A Leader in augmented reality gaming, which sets it apart from many competitors.
- Recent acquisition of a mapping startup shows interest in continual development of the technology



Weaknesses

Internal & Controllable



Abandonment of Titles

- Abandonment of titles that have struggled to get off to a good start ie: (Harry Potter, Catan titles).



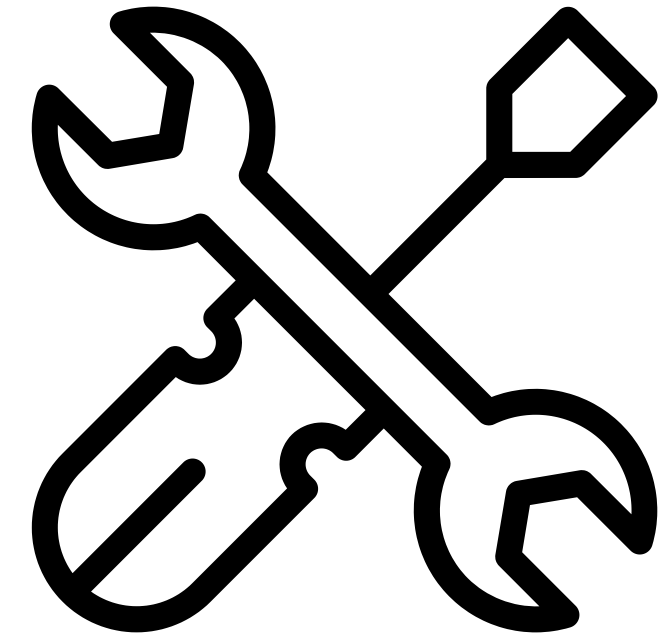
Technical Difficulties + Player Distrust

- Players often complain of server issues and location based tracking inaccuracies. (Armughanuddin, 2024)
- Noticeable quality difference between Nintendo titles and those released in partnership with Niantic
- Updated terms of service have made the Pokémon Go community wary of the developer.(Armughanuddin, 2024)



RPG focus

- Limited genre exploration: Niantic mostly focuses on location-based AR RPGs with limited exploration into other gaming genres.



Opportunities

External and Potentially Controllable



Strong Success of Pokémon Go has opened a lot of doors.

- Many corporations will be more willing to work with a company that has launched one of the most successful mobile games in history.
- Partnership with Nintendo could lead to more iconic IPs being adapted into AR titles.



AR/Spatial Computing Sector

Growth

- Increasing interest and advancements in AR technology can provide opportunities for new game development.
- Apple, Meta, and Valve have all entered the mixed reality space and anticipate a large amount of growth over the next decade.



Augmented Reality Advertising

- Niantic can leverage its AR platform to offer advertising opportunities within their games, such as location-based ads, branded in-game content, or sponsorships, providing new revenue streams.
- More partnerships with national chains, they have worked with Starbucks and McDonalds in the past.



Threats

External, Cannot Be Controlled



Emerging Competition

- As more companies begin work on delivering quality AR experiences, the market share Niantic has will decrease quickly.



IP and Licensing Risks:

- Niantic's reliance on licensed IPs (e.g., Pokémon) poses a risk if these partnerships are terminated or altered. Losing access to popular IPs could significantly impact their product offerings and revenue.



Privacy + Data Concerns

- Increasing scrutiny over data privacy and security regulations poses significant risks to Niantic's games, which heavily rely on location tracking and data collection. New laws or breaches could result in fines, loss of user trust, or stricter regulations affecting gameplay.



CAPABILITY ANALYSIS

STRENGTHS:

- Niantic stands out in the industry as a leader in augmented reality technology, with its expertise in machine learning and geospatial mapping setting it apart from the competition.
- Connection with Google has helped to maintain and attract a large talent pool.
- Led the way in creating the first widespread cultural phenomenon in augmented reality gaming experiences.
- “As app developers start scrambling to make their own killer apps for AR, though, they'll all be referencing Pokemon Go.” – CNET via (Stein, 2017).

WEAKNESSES

- As the AR field grows, competition over proprietary technologies may intensify, requiring vigilant protection and potential legal action to safeguard their in-house work.
- AR quality varies by title with some describing newer titles like Peridot as very hit or miss.
- “...Navigating menus can be really laggy and the app doesn’t always have a perfect read on distance and where floors actually are. – INVERSE Magazine on Niantic’s newest proprietary IP, Peridot, (Campbell, 2024).

STRENGTHS:

- Niantic collaborates with high-profile IP holders (e.g., Pokémon, Nintendo) and forms partnerships with local governments and tourism boards to host events and promote real-world exploration.
- Niantic's Lightship platform, which goes beyond gaming, has found applications in various augmented reality (AR) applications used by prominent retail chains for store navigation.
- On August 1, 2024, Trivver, an AR and AI tech company, partnered with Niantic to integrate Trivver's 3D data analytics with Niantic's proprietary tools. This collaboration "aims to enhance the measurement of AR advertising and brand experiences" (Sprigg, 2024).

WEAKNESSES

- Marketing effectiveness heavily relies on the success of their flagship titles. Expanding brand recognition beyond existing games and attracting new audiences remains an ongoing challenge.
- Poor management practices and a lack of focus on content development have resulted in the abandonment of newer titles such as “Harry Potter’s Wizards Unite!” just one year after their launch.
- Harry Potter: Wizards Unite shut down because "you have to make a great game" - Niantic’s CEO speaking to Sports Illustrated (McKeand, 2023).

WHAT CAN WE CONCLUDE?

- Niantic excels in augmented reality (AR) gaming, leveraging its Niantic Lightship platform for immersive experiences and innovation.
- The company demonstrates expertise in creating large-scale location-based games like Pokémon GO, enhancing user engagement and brand visibility through collaborations.
- Challenges include reliance on AR and location features, which may alienate traditional gamers, and a limited product lineup focused on flagship titles.
- Overall, Niantic's technological strengths and strategic partnerships support growth, but diversifying its offerings and boosting long-term engagement are crucial for future success.

PRODUCT DEVELOPMENT

PRODUCT

POKÉMON GO

- A groundbreaking AR game that combines real-world exploration with digital gameplay.
- Pokémon can be transferred to pokémon home for use in nintendo switch titles.

INGRESS

- First title published by Niantic.
- Framework for all future Niantic titles.
- First AR game that emphasized collaboration and exploration.

PIKMIN BLOOM

- First solo collaboration with Nintendo.
- Collect over 200 types of unique decor pikmin.
- Track daily steps and your mood with a unique interactive journal.

LIGHTSHIP

- Ar framework that can be licensed to interested developers.
- Getting ready to amp up licensing deals (Bloomberg – Are You a Robot?, 2020).

QUALCOMM AR HEADSET

- A collaboration in partnership with tech giant Qualcomm has left many fans excited for the future of AR games, with Niantic showing a prototype on their website in late 2022. (Building Real-World AR Software and Hardware With Qualcomm, n.d.)
- Mysteriously gone missing and is presumed to be in development hell as no updates have been given since 2023.

PROCESS

AGILE DEVELOPMENT STRATEGY

Niantic uses an agile approach to continuously iterate on its SAAS games. This allows for rapid updates, frequent feature additions, and quick bug fixes. They regularly release updates to keep content fresh, based on player feedback and data analysis.

INTERNAL DEVELOPMENT TOOLS

Niantic developed the Lightship platform, which not only powers their games but is also available to external developers. This platform aids in rapid prototyping, testing, and deployment of AR experiences, enhancing overall process efficiency (Niantic Lightship (n.d.).

EFFECTIVE USE OF PARTNERSHIPS

- By collaborating with well-known IPs and brands, Niantic efficiently integrates popular content into its games, which boosts player engagement and broadens its market reach.
- Niantic actively collaborates with these companies' core dev teams to get a clear insight on what an ar/mobile adaption of a popular franchise should look like.

Successful collaborations with the Pokémon company have spawned a number of physical items players can purchase to enhance gameplay.



PROBLEMS

COMMUNICATION

- Niantic's communication on updates and issues has been criticized for lack of transparency (Craig, 2020).

RESPONSE TIME

- Slow Response to Major Bugs + cheaters (Taylor, 2024).
- It may take up to 2-4 weeks for resolutions to special events or giveaways.

TECHNICAL ISSUES

- Constant technical issues have plagued Pokémon Go's gameplay for years with no end in sight.
- Players sometimes spoof location, use emulation, or gain access to private databases (Gibbs, 2020).

RELIANCE ON OUTSIDE IP

- Niantic's connection with publishers is a double-edged sword; while they frequently secure significant brand deals, they face challenges in developing their own intellectual property.

LOCATION BASED EXCLUSIVES

- Regional exclusive pokémon can only be caught when in that certain country. These Pokémon can also not be traded making them very costly to acquire unless you live in the country of origin. (PokémonGoLive.com, 2024)

- Pokémon encounter issues and battle connection strength have been two big issues.

MARKETING MIX

PRODUCT

In-App Purchases are a crucial part of Niantic's business strategy. In fact, the "Game World Observer" (2024) reports that over 8 Billion Dollars in revenue has been generated through these purchases. In-App Purchases allow players to buy in-game currency, such as PokéCoins in Pokémon GO, and use it to purchase various virtual goods and services, including:

- **Cosmetic Items:** Players can purchase outfits, skins, and other cosmetic upgrades for their avatars, enhancing personalization and individuality.
- **Gameplay Enhancements:** Items like raid passes, incubators, and EXP. boosts offer practical advantages, enabling players to progress more quickly or participate in special events.
- **Event Tickets:** Niantic regularly hosts exclusive events that require ticket purchases, granting access to unique in-game activities, rewards, and content.

PRICE

Pokémon Go utilizes Pokécoins as in-game currency. **100 Pokécoins is .99 cents.** Here are some popular items converted to rough USD values – Via: (Pokémon Go Store, 2024.)

Egg Incubator – \$1.50

20 Poké Balls: \$1.00

Super Incubator: \$2.00

Incense: .40 cents

Lucky Egg: .80 Cents

Lure Module: \$1.00

Team Medallion Medal: \$10.00

(Pokémon Go Store, 2024)

Areas for Improvement:

Consider implementing a subscription model for dedicated players that provides exclusive benefits.

Strive for balanced monetization to prevent pay-to-win perceptions, prioritizing the enhancement of the player experience.



PLACE

Niantic's games are accessible on mobile platforms (iOS and Android) and are available worldwide through app stores. Their gameplay heavily depends on real-world locations, aligning with their AR-driven design.

Distribution Strategy:

Direct downloads via app stores.

Worldwide availability with localized content and events.

Areas for Improvement:

- Expand platform availability (e.g., potential cross-platform experiences or companion apps on PCs/consoles).
- Improve accessibility in rural areas or locations with fewer landmarks.

PROMOTION

Niantic engages in digital marketing through social media, in-game events, and partnerships with global brands. The company also utilizes community-driven events (e.g., Pokémon GO Fest) to engage players and promote real-world interactions.

PROMOTIONAL STRATEGIES:

Hosting limited time events and community days.

Leveraging popular IPs and partnerships. Lee, A. (2023, October 3)

Tournaments

Brand partnerships.

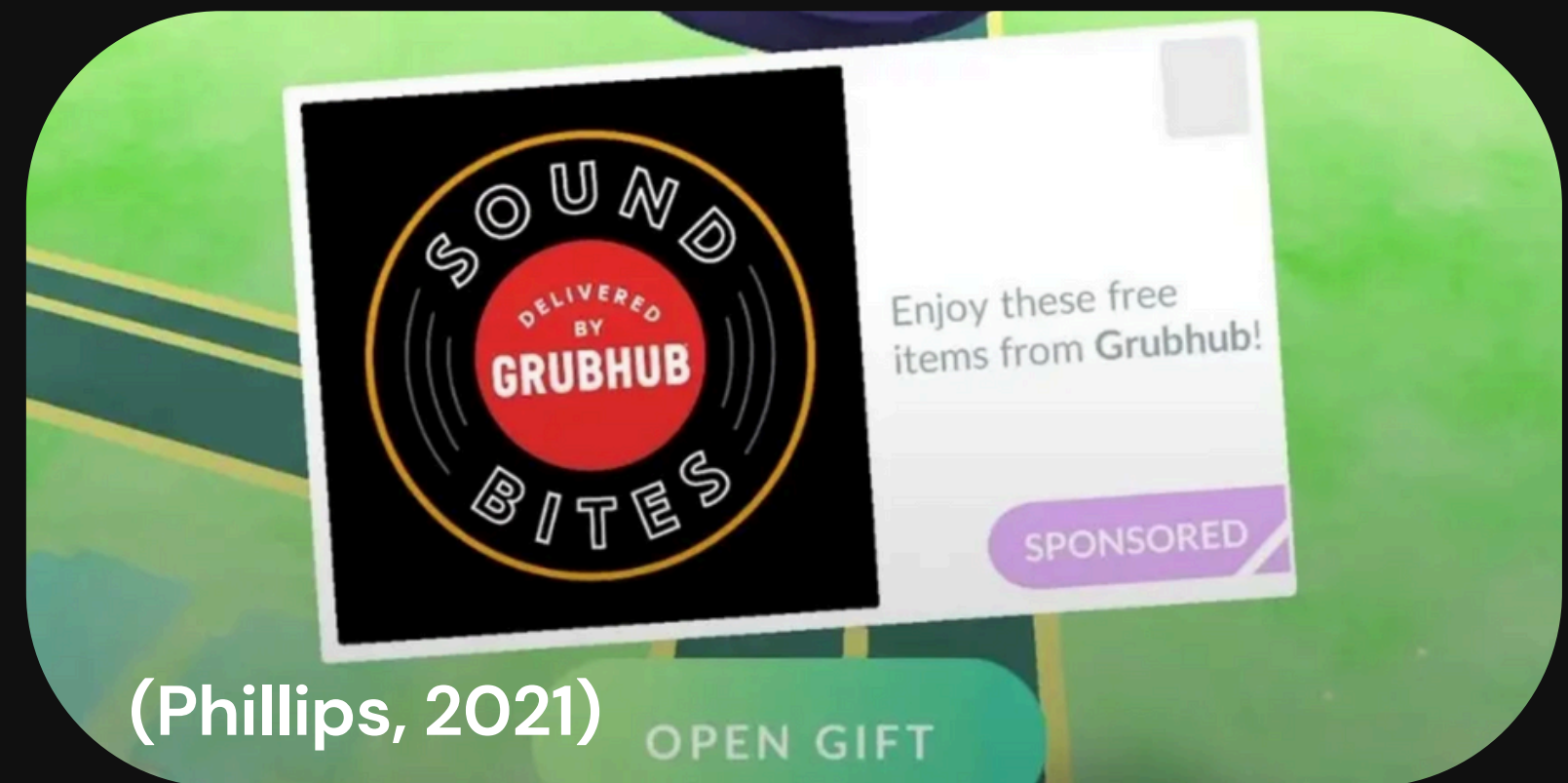
Nintendo Switch connectivity.



LUNCHABLES® Teams Up with Niantic to Launch the First-Ever Rewarded AR Ads Campaign. (n.d.).

September 29, 2023

LUNCHABLES® Teams Up with Niantic to Launch the First-Ever Rewarded AR Ads Campaign



(Phillips, 2021)

PROMOTION

Niantic has sometimes showcased new games and features at important keynotes and events., like Pokémon Go on the Apple Watch in 2016.

Promoting AR games at events centered around the tech sector is a wise strategy, as the majority of attendees are likely to be fascinated by the technology's inner workings.



Cutting edge games are often shown at huge tech events, like Honor of Kings World's recent unveiling at the 2024 Apple Event.

Image via Apple (2024). Story by Shukla (2024).

**TARGET
AUDIENCE**

Niantic's target audience primarily consists of:

- Casual Gamers: Players looking for mobile games that offer easy-to-pick-up mechanics and brief play sessions.
- AR Enthusiasts: Individuals interested in augmented reality and its integration into gaming.
- Families and Friends: Groups who enjoy social gaming experiences and real-world exploration.
- Fans of Major IPs: Niantic draws heavily from established fan bases such as Pokémon and Pikmin, targeting players already familiar with these franchises.

Demographically, Niantic's games appeal to a wide range of age groups, with a focus on younger adults aged 18–34 who engage in mobile gaming regularly.

According to data published by Statista, 63% of Pokémon Go players are males ages 18–34 (Statista, 2024).



males – 63%

females – 37%

VALUE PROPOSITIONS

HOW ARE CURRENT USP'S BEING CREATED AND DELIVERED?

USP: REAL WORLD EXPLORATION

Niantic's games integrate AR technology to superimpose game elements onto the real world, creating an immersive experience for players. In Pokémon GO, for example, players use their smartphones to "see" Pokémon in their real-world environment. This blend of the physical and virtual world is a major differentiator in the mobile gaming industry.

- Example: Players must physically travel to real-world locations to capture Pokémon, participate in raids, or discover new areas within the game. This interactive use of AR keeps players engaged while encouraging them to explore their surroundings.

USP: COLLABORATIVE AND SOCIAL EXPERIENCES

Delivery: Niantic promotes social interaction and teamwork by encouraging players to collaborate in real-time. Events like Pokémon GO Fest, raid battles, and community days are designed to bring players together, both virtually and physically.

- Example: In Pokémon GO, raid battles require multiple players to come together to defeat powerful in-game bosses at specific locations, reinforcing the social and cooperative elements of the game.

ONGOING CONTENT UPDATES AND EVENTS

Niantic maintains player interest and engagement by regularly releasing new in-game content, including special events, limited-time challenges, and seasonal updates. This dynamic content keeps the gameplay fresh and encourages players to return frequently.

- Example: Pokémon GO releases frequent updates with new Pokémon, limited-time events, and themed challenges, such as special holiday events or collaborations with other franchises. These updates ensure that players continue to engage with the game long after its initial release.

PROPOSED VALUE PROPOSITIONS

Diverse Game Themes and Genres

- Broaden Game Genres. New titles produced with established IP can broaden gameplay opportunities.

Nintendo Switch Integration

- Connectivity features within the next mainline Pokémon title will be deeply integrated within the game. Exclusive Pokémon, items, and collectables for use in both the switch game and in Pokémon Go.

5G Network Optimization

- Enhanced AR experiences driven by faster data processing and advances in AI and machine learning will allow for more lifelike experiences.

WHAT COULD NIANTIC DO?

“AR FOR EVERYDAY LIFE”

Niantic can expand its AR technology beyond gaming into utilities that assist with navigation, education, or tourism. Imagine an AR app that helps people navigate cities, discover local landmarks, or learn about historical sites in real-time through their phone's camera. This utility-driven expansion could position Niantic as not just a gaming company but as a leading AR platform for everyday life.

- **Example:** Niantic could partner with city governments or travel agencies to create AR-guided tours that blend gaming elements with real-world discovery.

WHAT COULD NIANTIC DO?

“YOUR WORLD, YOUR GAME”

Offering users more control over the creation and customization of AR experiences could differentiate Niantic’s products. For instance, users could create their own AR quests, challenges, or environments within the existing framework of Niantic games.

- **Example:** Niantic could create a platform where players can develop custom challenges for Pokémon GO or Ingress that are shared with other players in their area. This would create community-driven content and engagement, keeping players invested for longer periods

WHAT COULD NIANTIC DO?

EDUCATIONAL AR EXPERIENCES

- Niantic could develop educational AR games for children and adults, focusing on subjects like history, science, and geography. This could attract schools, museums, and parents looking for fun yet educational tools.
- Example: An AR game could take users through a historical journey of their city or bring science experiments to life through interactive AR demonstrations.

INDUSTRY TRENDS

LONG TERM - MORE IMMERSIVE EXPERIENCES

- AR experiences on physical devices (e.g., Pokémon Go Plus).
 - Potential to provide more immersive gaming experiences.
 - Additional revenue generated from accessory sales.
-
- AR experiences with wearable devices (e.g., AR glasses, more affordable VR headsets) **expected to grow by USD 24.12 billion** from 2022 to 2027, growing at a CAGR of 30.11%.(Technavio, 2023).”
 - Potential to provide more immersive gaming experiences.



A focus on how the Pokémon franchise can influence everyday aspects of our lives, such as walking or sleeping, has been a central theme of the Pokémon Company's strategy since the 2010s.

INTERMEDIATE

5G, 6G, & THE EXPANSION OF GAMING:

- The rise of mobile gaming will be enhanced by 5G and forthcoming for faster, more interactive gameplay.
- Growth Impact: Greater global accessibility for AR-driven games like Pokémon GO, “significantly improving performance in urban and rural areas without current network coverage or adequate speeds” (Ag, 2024).

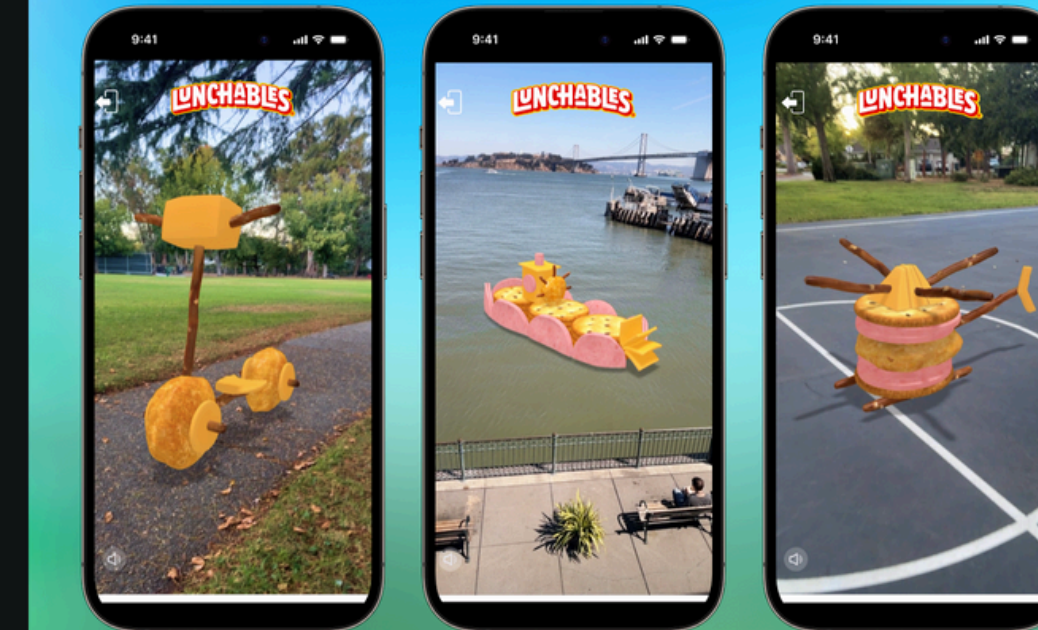
“100Gb/s transmissions could become the norm for mainstream wireless network data transfer within a few years (Williams, 2024).”

With 6G capabilities, immersive AR and VR experiences will vastly improve, enabling larger data streams and instant rendering of high-resolution content. This advancement will lead to enhanced multiplayer interactions, better digital overlays in reality, and richer visual and audio elements.



SECULAR LOCATION-BASED F2P GAMES

- Very accessible, as anyone with a phone can download the game and start playing for free, permitted they share their location.
- Games like Pokémon GO have paved the way for this phenomenon.
- Niantic's approach: Crafting experiences that integrate real-world exploration with digital incentives. A big focus on player collaboration.
- Enhanced community engagement and collaborative marketing initiatives with brands like Lunchables, McDonald's and Starbucks.



September 29, 2023

LUNCHABLES® Teams Up with Niantic to Launch the First-Ever Rewarded AR Ads Campaign

(LUNCHABLES® Teams up With Niantic to Launch the First-Ever Rewarded AR Ads Campaign, n.d.)

“Niantic has taken a very different approach than other gaming companies or gaming media platforms.” Erica Kovalkoski, Niantic's head of brand marketing partnerships, discussing the recent Lunchables AR promotion – Via Lee (2023).

COMPETITIVE ANALYSIS

THE OVERALL GENRE:

- Merges real-world settings with engaging virtual content, largely made popular by mobile gaming.
- Growth: The AR gaming sector is expanding as mobile device technology advances and AR-focused hardware becomes more sophisticated.

Genre Competitors: Major contributors in this field consist of developers creating location-based or augmented reality experiences, although non-AR mobile games are also indirect competitors.

DIRECT MAJOR COMPETITORS:



INDIRECT MAJOR COMPETITORS:



STRENGTHS:

WEAKNESSES:

STRATEGIES:

JURASSIC WORLD ALIVE

- Boasts a substantial fan base through its licensed intellectual properties.

Dependence on a single licensed brand restricts its wider appeal.

Relies on licensed content to attract fans of well-known franchises.

WALKING DEAD: OUR WORLD

- Integrates immersive, narrative-rich augmented reality experiences.

Technological issues and subpar AR integration.

Focuses more on narrative elements and smaller-scale AR experiences integrated with the AMC TV series.

MONOPOLY: GO!

- Captures large player-base of monopoly fans and casual gamers.
- Easy to play on the go with one hand.

Prominent ads and monetization, reliance on timed recharge mechanics.

Utilizes Facebook to increase promotional reach, actively advertises on main channels like NBC, Fox, CBS.

COMPETITIVE ANALYSIS CONCLUSION:

In conclusion, Niantic's leadership in augmented reality gaming positions it well for future growth, but the company must continue innovating and expanding its product offerings to maintain its competitive edge. With opportunities in expanding AR applications beyond gaming, Niantic has the potential to capitalize on new markets while building on its existing strengths and eliminating or minimizing current weaknesses.

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**THANK
YOU!**