



ANNUAL VIDEO GAMES MARKETING SURVEY 2025

Part of the Bastion Network



www.bastion.co.uk



Ravi Vijn
Managing Director, Bastion

FOREWORD

The games industry is shifting fast — budgets are tighter, competition's fiercer, and the fight for attention has never been tougher.

Our latest marketing survey reveals a clear picture: the challenges are universal, and so are the moves that get results. **Discoverability still tops the list** — but it's no longer just about being seen. It's about owning the spotlight in an overcrowded market.

Marketers tell us their biggest wins come from:

- **Laser-focused audience profiling** that speaks directly to the right players.
- **Creative that lands early** — surprising, engaging, and converting from day one.
- **Storefronts treated like marketing powerhouses** — especially Steam.

The one-size-fits-all playbook? Dead.

From influencer partnerships to Steam events to how studios show up on LinkedIn — the rule is simple: authenticity wins. With teams under pressure, marketers are turning to trusted agency partners to deliver bold, performance-driven creative at scale.

At Bastion, that's exactly what we do — and we do it so our partners don't just compete... they dominate.

We hope you find the report useful. If you have any questions please reach out or come and see us on the Ukie booth at Gamescom.





Clare Hawkins
G2M Director

EXECUTIVE SUMMARY

GAMES MARKETING IN 2025: LEANER, SMARTER, LOUDER

The world of games marketing isn't just evolving it's accelerating. Over the last 12 months, marketers have been asked to do more with less: tighter budgets, leaner teams, and a market bursting at the seams. Agility is no longer a nice to have, it's vital to success.

Our latest G2M survey takes the pulse of the industry. The results? Over 60% of respondents bring a decade or more of publishing experience to the table, but most work in teams of fewer than five. That's a powerhouse of talent, stretched razor thin.

Discoverability remains the industry's Achilles' heel. 31% of respondents expect it to be the top challenge this year and it cuts across studio size, region, and budget. Whilst some teams are spending more with agencies (39.9% saw that rise in 2024), 63.9% still say their overall marketing budgets fall short.

Interestingly, while the split between publishers (51.3%) and developers (48.7%) is nearly even, their strategies are remarkably aligned. Smaller teams are betting big on standout creative, community momentum, and smart, scrappy partnerships. Steam page optimisation, optimising traffic and store front placement remain high priorities, proof that a strong store presence still moves the needle.

Influencer marketing is the clear core strategic ingredient of successful launches in 2025. Marketers see it as the most effective way to cut through the noise especially organic influencer strategies, now leading all other channels in perceived impact. Owned and earned media are dominating, with community management (16.3%) and influencer partnerships (25%) emerging as the secret weapons for both conversion and long-term engagement.

Audience insight is becoming the ultimate strategic edge. The most successful campaigns start by pinpointing the "true audience" and meeting them where they are on genre-specific Discords, through carefully matched creators, and with messaging that actually resonates. Despite a third of companies shrinking their marketing teams, 44.4% remain undecided about hiring in the next year. That uncertainty reflects broader market jitters but it's not stopping savvy teams from pushing forward with smarter audience segmentation and laser-focused creator collaborations.

There's a shift in tone, too. The industry is moving away from chasing shiny new platforms and toward building trust, relevance, and creativity across all channels. Storefronts are reclaiming their importance not just as sales tools, but as spaces for storytelling.

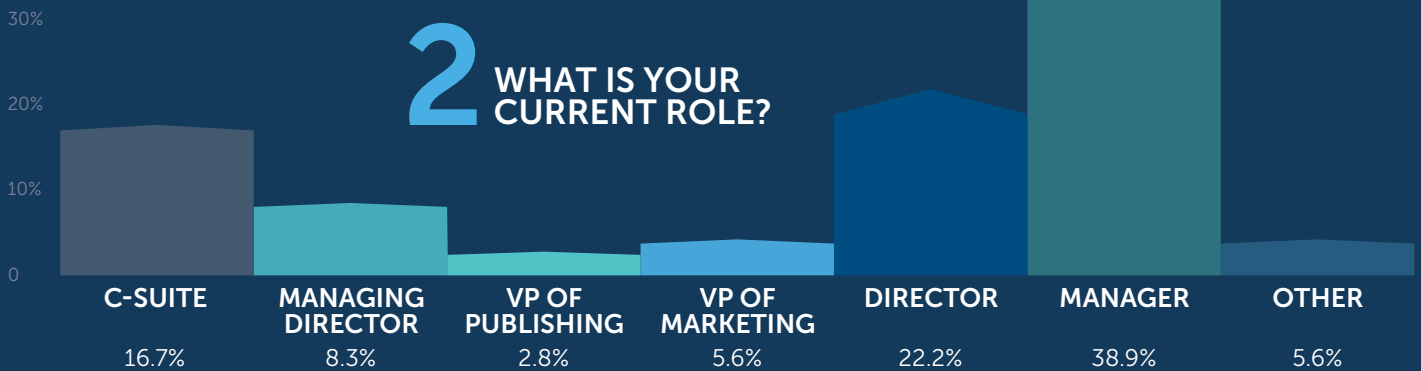
High-impact trailers, sharp capsule art, and narrative-rich and community focused campaigns are making a comeback. And then there's AI, 2025's biggest conversation starter. Some see it as a game-changer for production and targeting. Others worry about its role in adding more noise to an already crowded market. But one thing is clear: platforms like Steam, Reddit, and Discord are winning favour as authentic spaces for community-building unlike the increasingly pay-to-play, volatile nature of traditional social media. Looking ahead? Games marketing will continue to fragment. Teams will shrink. Content will get more personal.

Discoverability will remain tough. But with sharp creative, the right channel mix, and strong understanding, there's still huge opportunity for studios big and small to break through and truly connect with players.

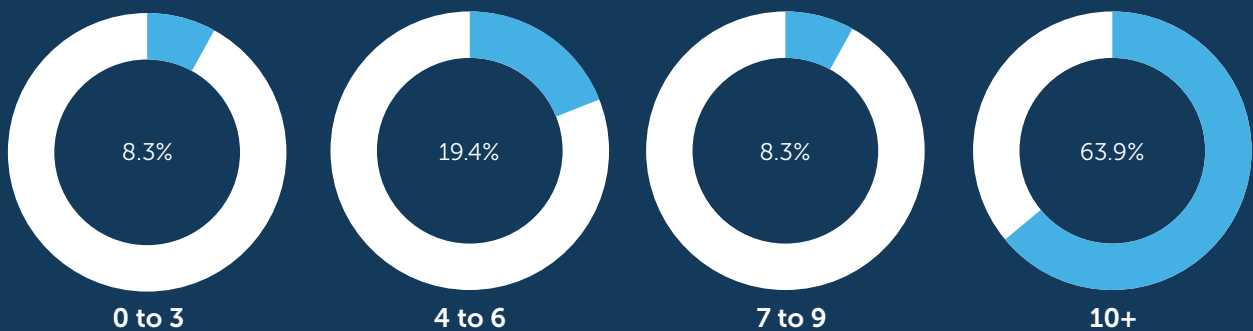


ABOUT OUR RESPONDENTS...

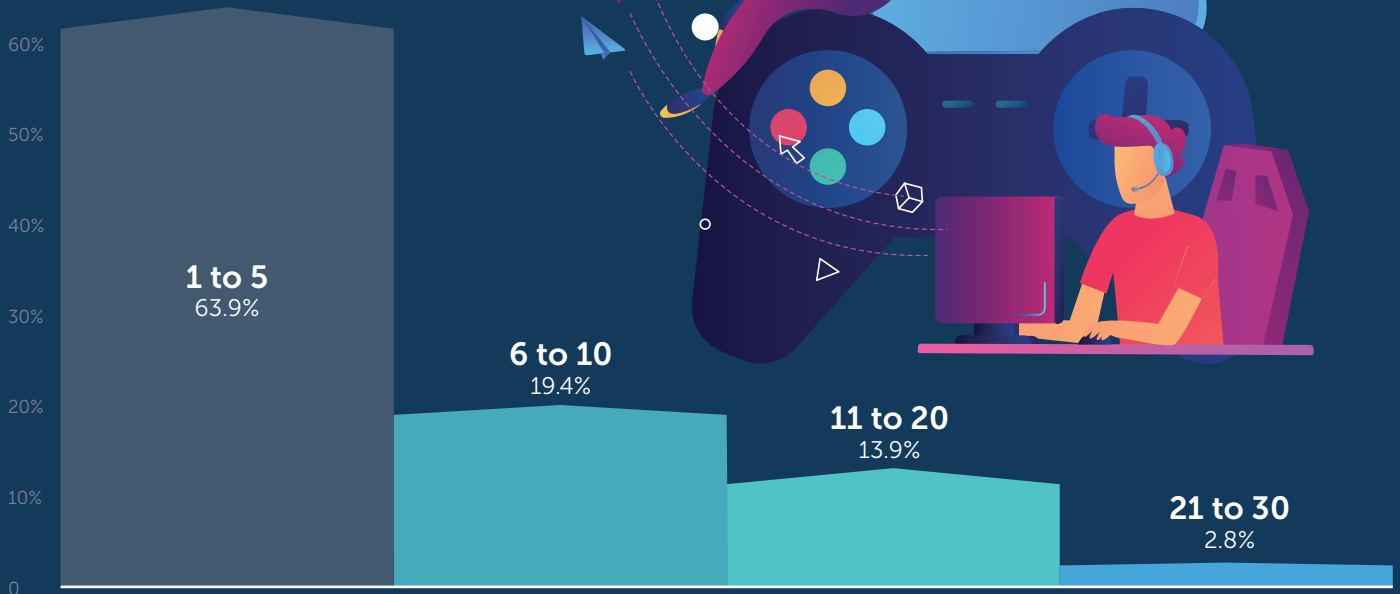
1 WHERE ARE YOU BASED?



3 HOW MANY YEARS EXPERIENCE DO YOU HAVE IN THE VIDEO GAME PUBLISHING INDUSTRY?



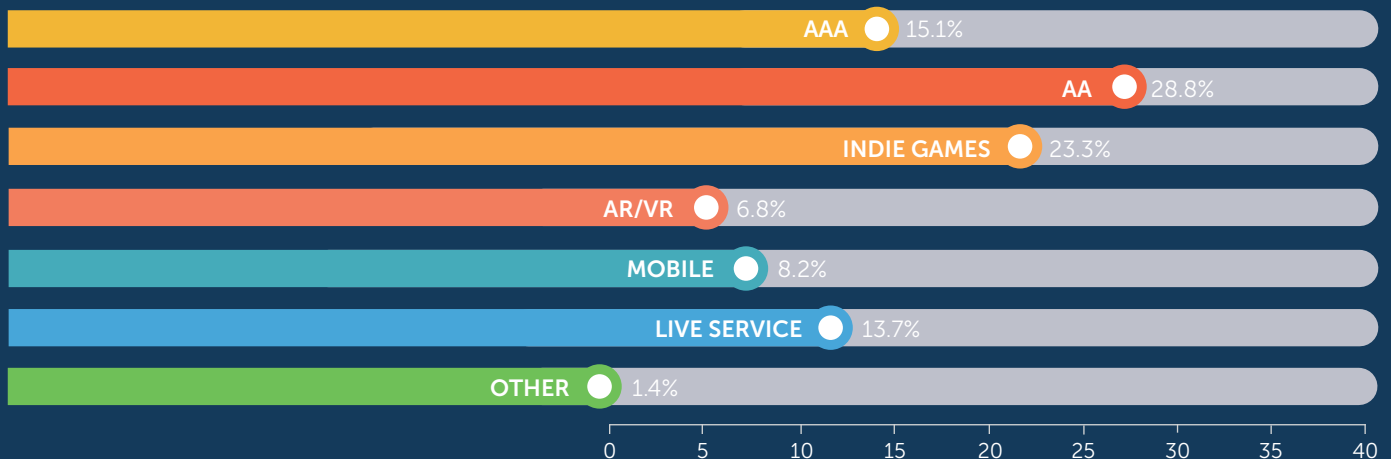
4 WHAT IS THE SIZE OF YOUR MARKETING TEAM?



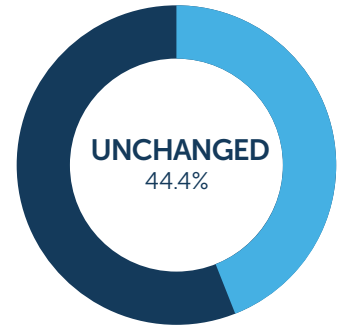
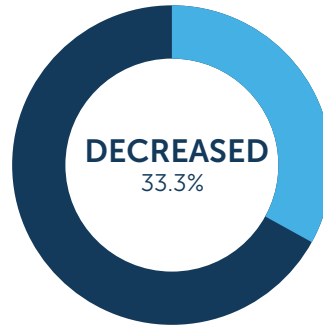
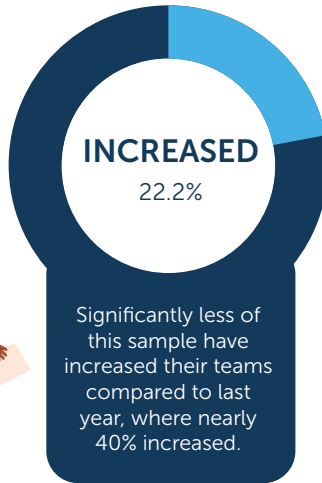
5 WHICH OF THE FOLLOWING BEST DESCRIBES YOUR BUSINESS?



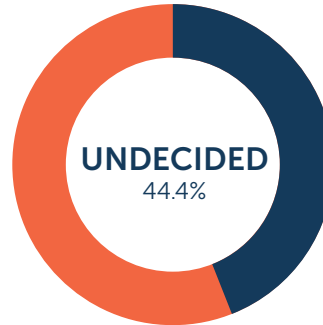
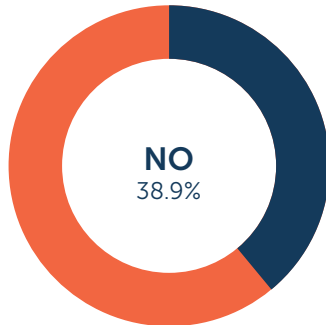
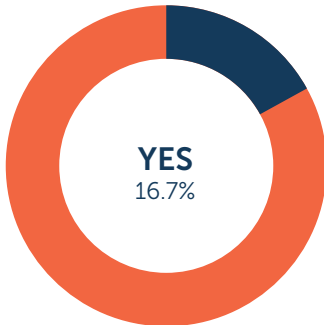
6 WHAT TYPES OF GAMES DO YOU PUBLISH/DEVELOP?



7 HOW HAS THE SIZE OF YOUR MARKETING TEAM CHANGED OVER THE PAST YEAR?



8 WILL YOU BE HIRING FOR THIS TEAM IN THE NEXT 12 MONTHS?



9 HOW HAS YOUR AGENCY SPEND CHANGED OVER THE LAST YEAR?

The majority of the sample is increasing their agency spend this year.

INCREASED 38.9%

Significantly less marketers (14.2%) are decreasing their agency spend this year compared to last year.

DECREASED 27.8%

A larger number of participants (13% more) aren't changing their agency spend.

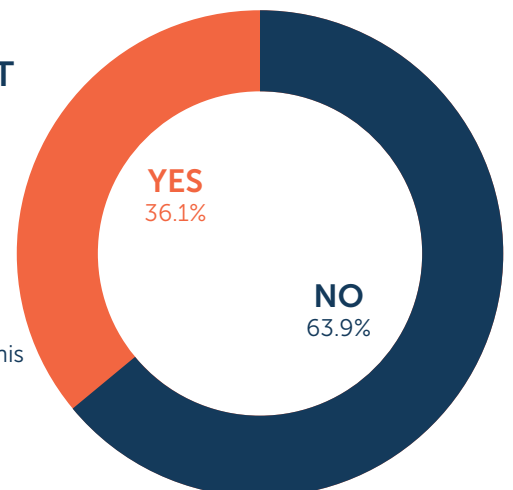
UNCHANGED 33.3%

0 10 20 30 40



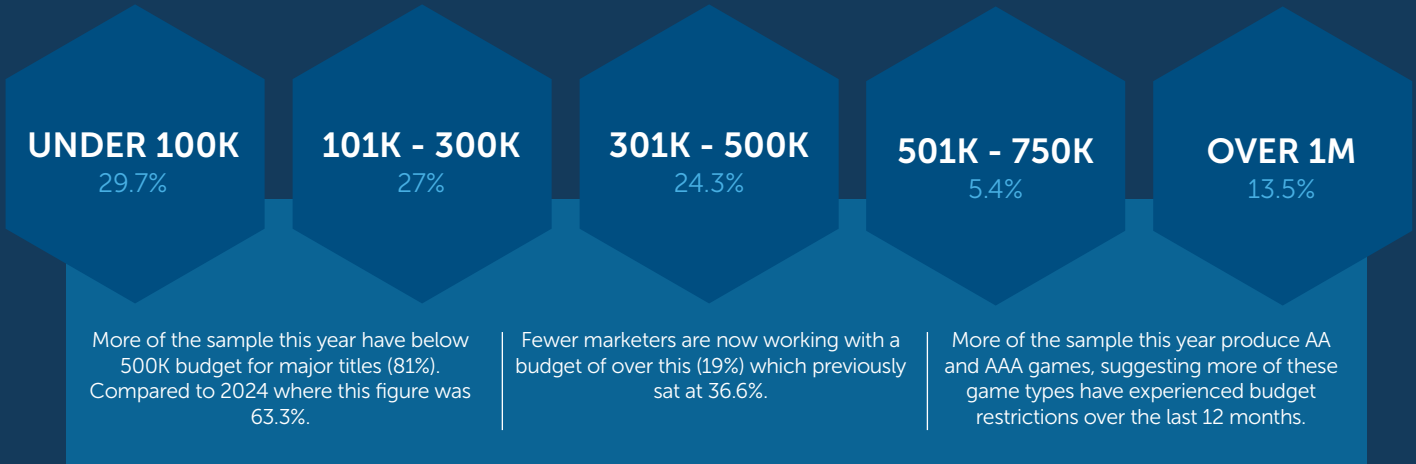
10 DO YOU FEEL YOUR CURRENT BUDGET IS ADEQUATE TO MEET YOUR MARKETING OBJECTIVES?

In 2024, the majority (60%) felt that they had sufficient budget, but this figure now sits at 36%.



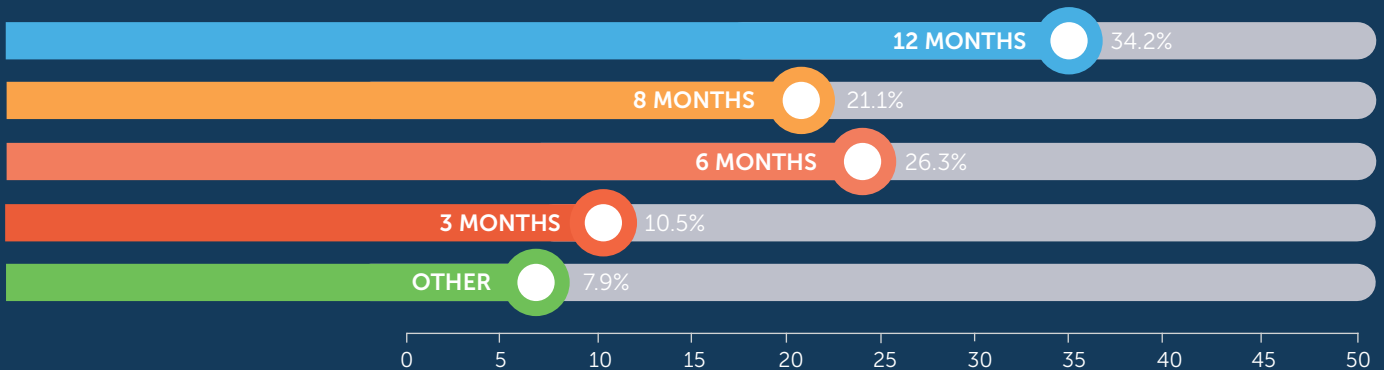
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FOR YOUR MAJOR TITLES, WHAT IS THE TYPICAL SIZE OF YOUR MARKETING BUDGET PER GAME?



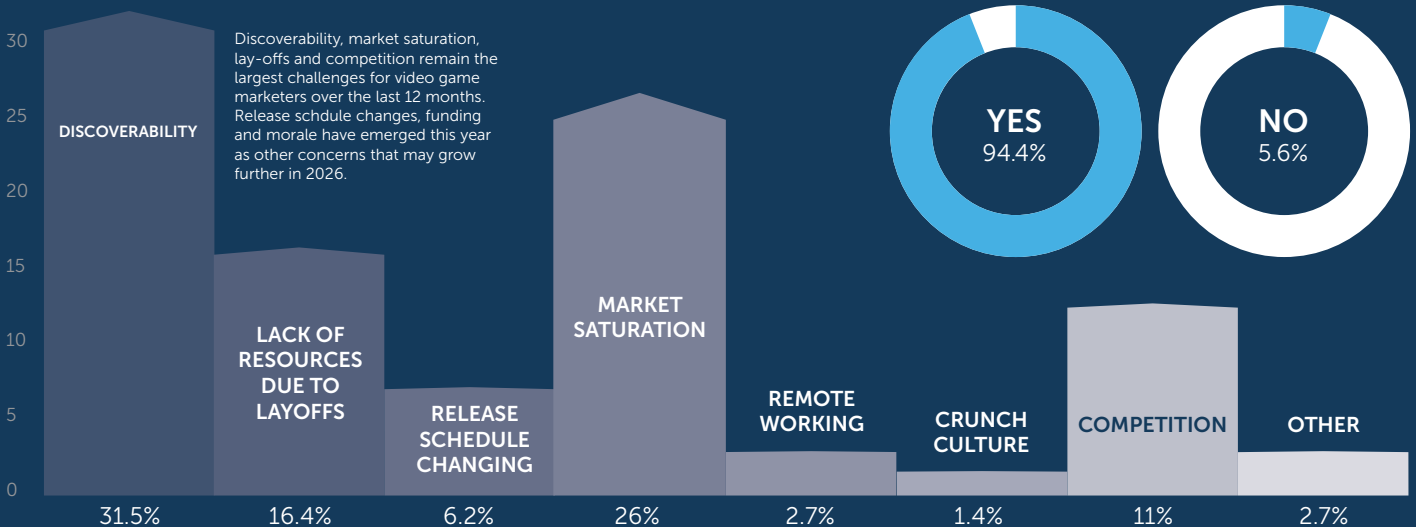
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HOW EARLY DO YOU TYPICALLY START INVESTING/SPENDING YOUR MARKETING BUDGET BEFORE A GAME'S RELEASE DATE?



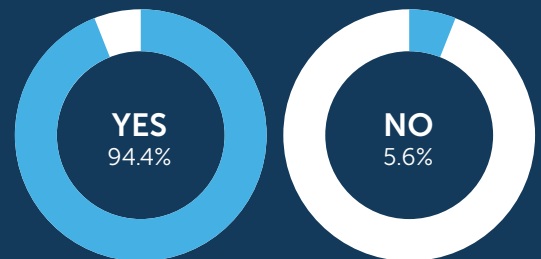
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WHAT DID YOU CONSIDER TO BE THE BIGGEST CHALLENGE IN VIDEO GAME PUBLISHING LAST YEAR?

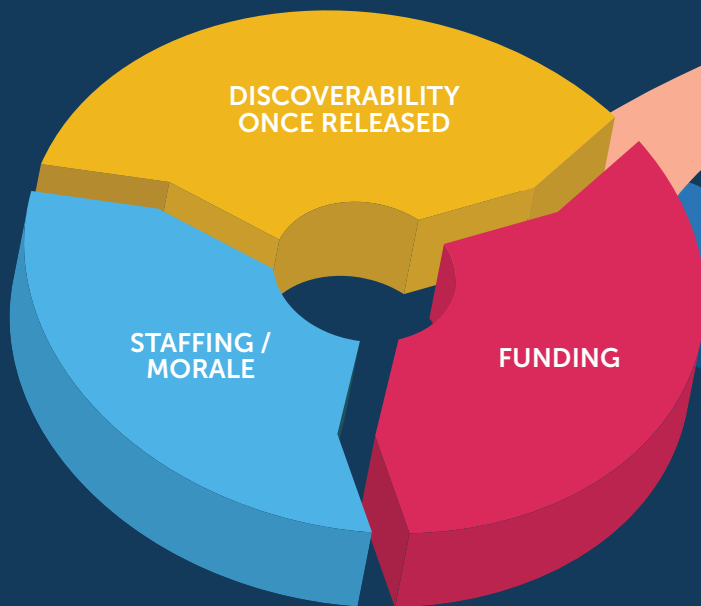


14

DO YOU THINK THIS WILL REMAIN THE BIGGEST CHALLENGE OVER THE NEXT 12 MONTHS?



15 OF THOSE WHO ANSWERED "NO",
THE MOST COMMON CONCERNS
WERE SPREAD EVENLY ACROSS...



16 SELECT THE 3 MOST
EFFECTIVE CHANNELS AT
MEETING YOUR OBJECTIVES.

11.5%

PR

4.8%

PAID MEDIA (ABOVE THE LINE)

5.8%

PERFORMANCE MEDIA

9.6%

PAID INFLUENCER MARKETING

25%

ORGANIC INFLUENCER MARKETING

12.5%

CHANNEL MARKETING (STEAM/ XBOX/ PS)

16.3%

COMMUNITY MANAGEMENT

6.7%

PAID SOCIAL MEDIA

2.9%

EVENTS

4.8%

ORGANIC SOCIAL

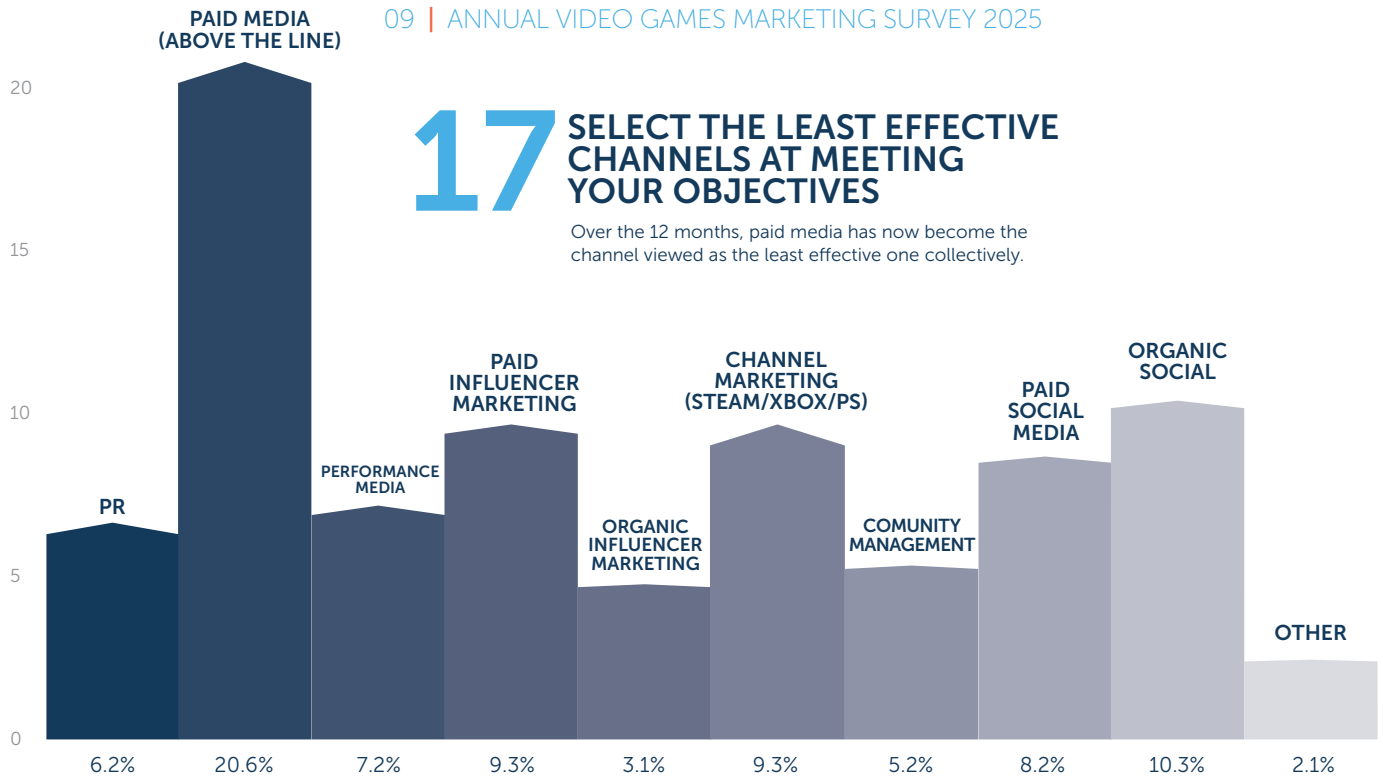
Organic Influencers and Community Management have emerged as what the majority of the sample sees as the most effective marketing channel. A shift from 2024 where Paid Media (Above the Line) and Paid Influencer were the most preferred.

Events emerges as a growing marketing channel backed by qualitative data where some participants believe it helps discoverability.

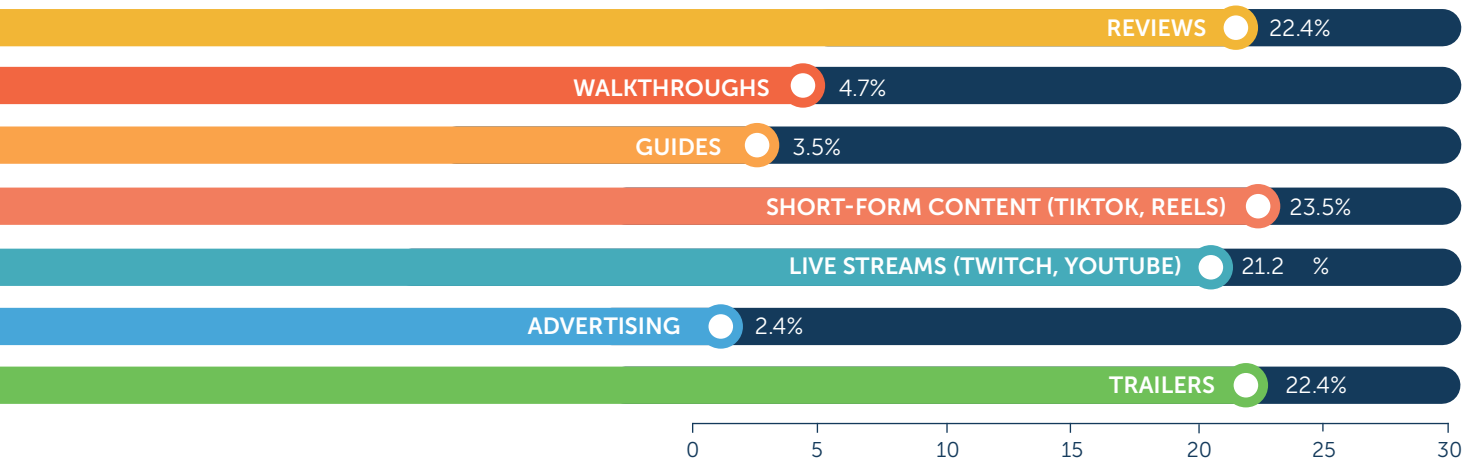
The data suggests a shift towards more organic and community led content over the last 12 months.

0 10 20 30





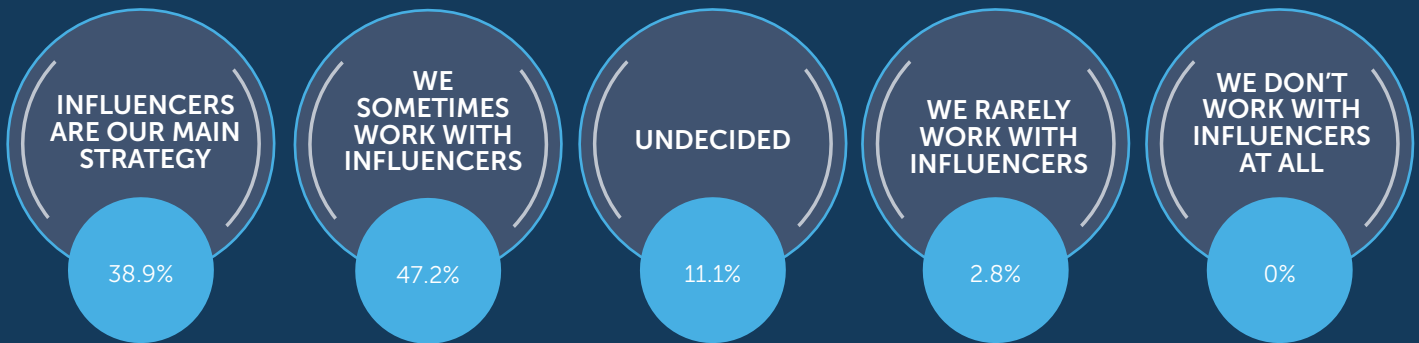
18 WHICH CONTENT TYPE DO YOU CONSIDER THE MOST IMPORTANT?



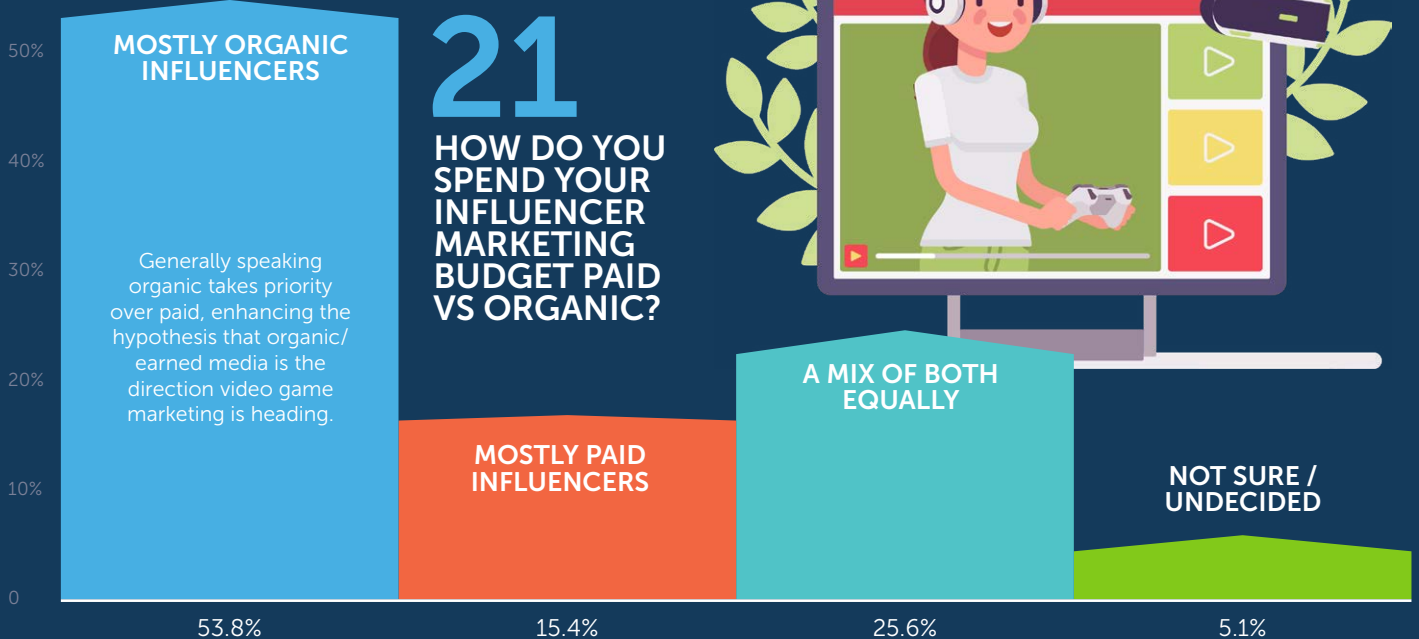
19 DO YOU UTILISE CONSUMER DATA PLATFORMS SUCH AS GLOBAL WEB INDEX?



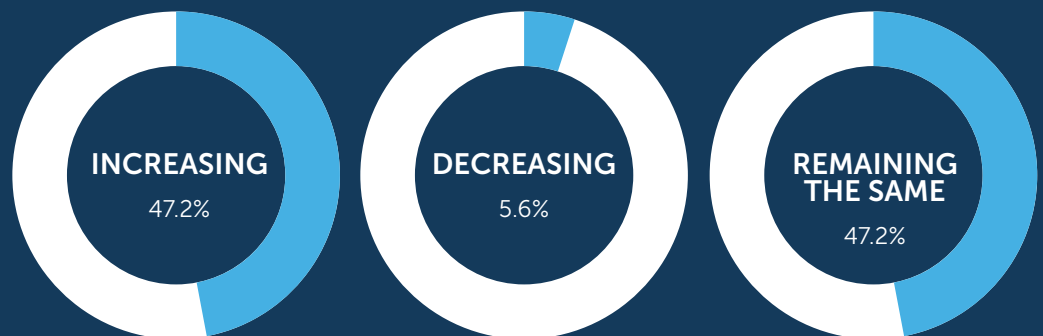
20 HOW IMPORTANT ARE INFLUENCERS AND CONTENT CREATORS IN YOUR MARKETING STRATEGY?



In contrast to last year, everyone sampled is working with influencers in some capacity. Most prefer a mix of paid and organic.



22 HOW IS YOUR SPEND ON INFLUENCER MARKETING LIKELY TO CHANGE OVER THE NEXT 12-24 MONTHS?

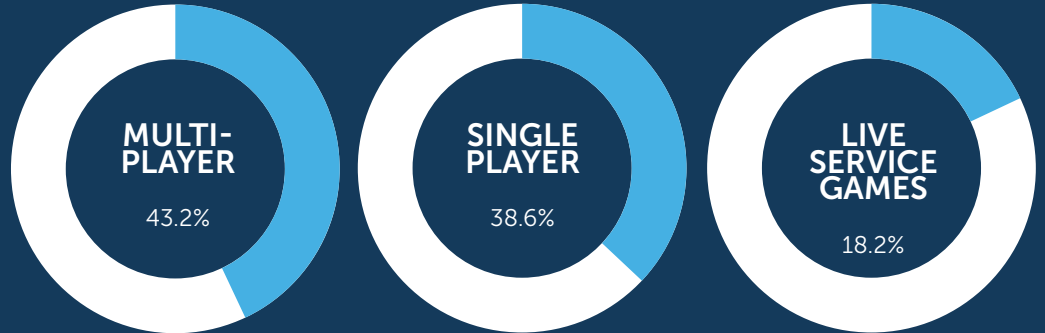


No significant change from 2024



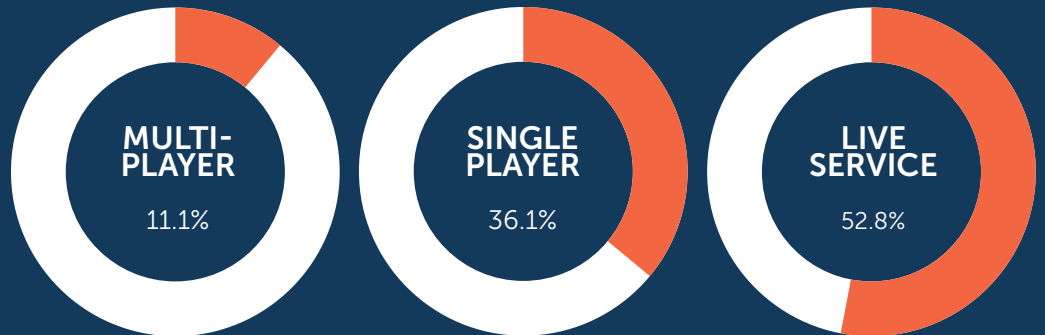
23

WHICH OF THE FOLLOWING IS THE MOST IMPORTANT GAME TYPE FOR YOUR BUSINESS RIGHT NOW?



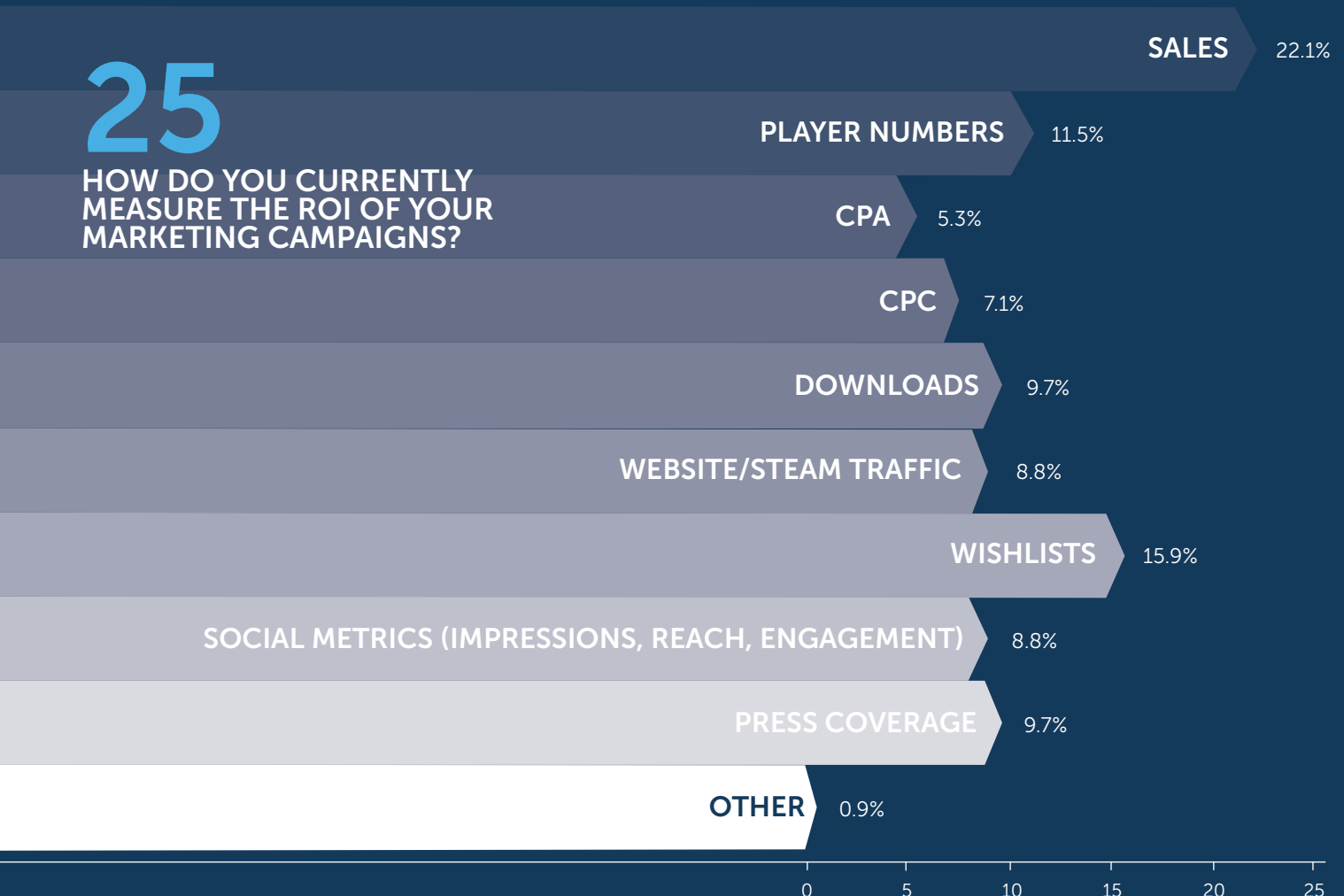
24

WHICH OF THE FOLLOWING IS THE LEAST IMPORTANT GAME TYPE FOR YOUR BUSINESS RIGHT NOW?

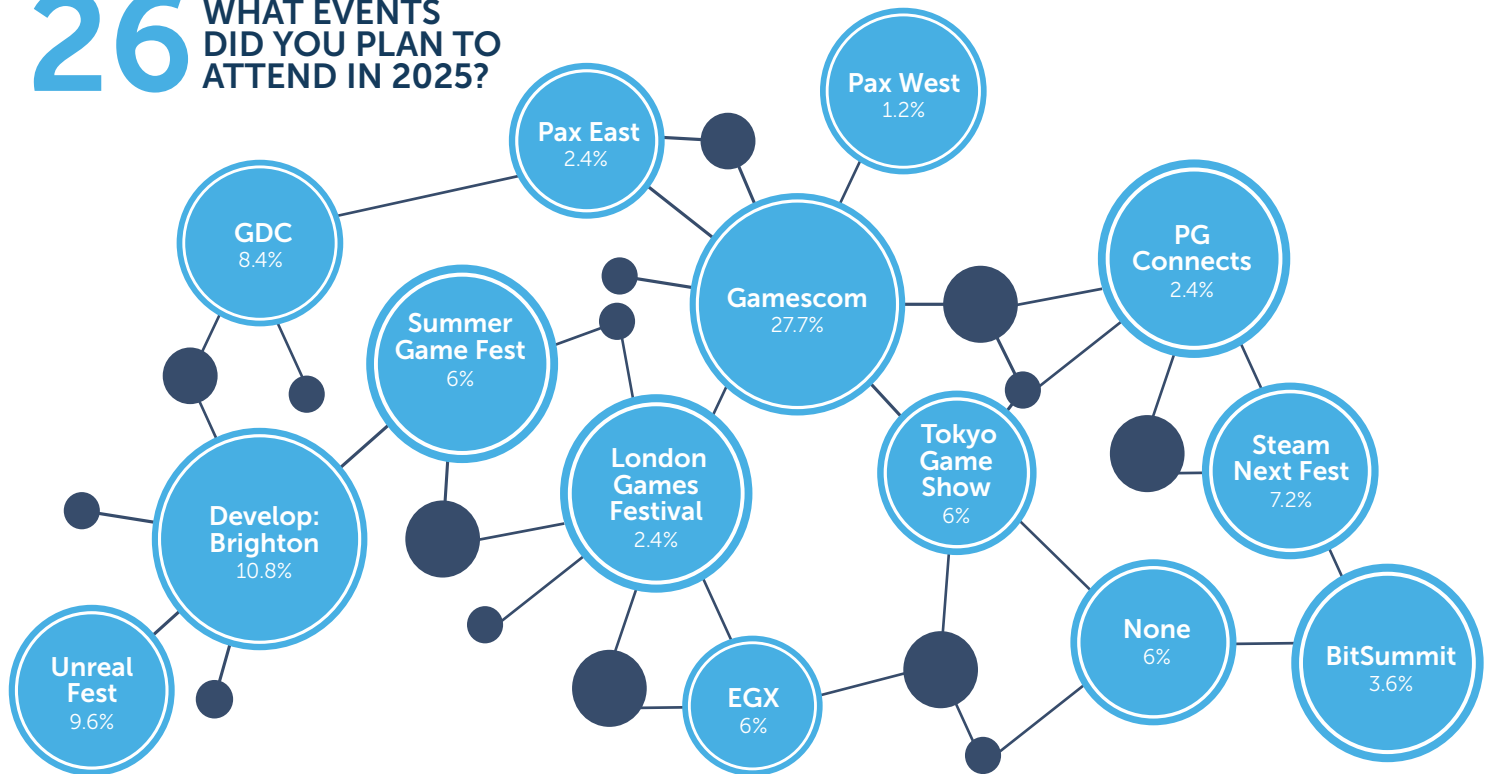


25

HOW DO YOU CURRENTLY MEASURE THE ROI OF YOUR MARKETING CAMPAIGNS?



26 WHAT EVENTS DID YOU PLAN TO ATTEND IN 2025?



27 HOW DO YOU SEE THE VIDEO GAME INDUSTRY EVOLVING OVER THE NEXT 12 MONTHS, AND WHAT KEY TRENDS ARE SHAPING YOUR MARKETING STRATEGY?

"Hopefully the acceptance that 'extraction' is not the genre of the future."

"We have seen a need from our audience to be present physically in our local markets. People more and more are needing a sense of belonging and being able to create spaces that dictate that is crucial."

"AAA will struggle apart from a few exceptions, GaaS even more. Opportunities are in AA and indie games but competition is strong and discoverability and market saturation will remain being the biggest issues."

"AI, not so much for art or idea generation, but for streamlining processes."

"AI in general. Its usage in planning, search advertising, creative assets and development."

"Balancing back out to pre-Covid times. Less consumer spend on cosmetic content."

"Focus on both community and engagement with others either in or out of game."

TALK TO US TODAY...

To find out more details about this survey get in touch
at hello@bastion.co.uk



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