Research on the Steam market and Sales strategy

Goal

Mission Statement:

The new start-up gaming studio has very little starting capital, requiring the production of a **new game that will bring in the necessary revenue to keep the business afloat**. Since the product requires to be at least moderately successful, **a method needs to be devised which ensures the game will likely be a success**. Conventional advertisement cannot be afforded, and the **product will need to be able to market itself with minimal marketing effort**, relying on word of mouth and natural coverage. Conventional advertisement cannot be afforded, and to overcome this hurdle; the business will be **required to research the possible platforms and genres to give the game the highest chance for the product to find its audience**.

Target Audience:

The largest demographic group on the Steam platform (age range from 18 - 34)

Reason:
Platform: This platform gives us the highest chance in success due to steam's unique rating system that doesn't use a scale but a binary positive vs negative. This makes it so a 5.5/10 rating is equally as valuable as a 10/10 rating. The platform then gives a ratio of positive vs negative rating which gives the clients the perception of a scale rating. This gives our game a higher likelihood to gain a positive rating, priming customers to have a positive perception of our game by herd mentality.

Demographic: 38% of US gamers are aged between 18 and 34. Under-18s make up 21%, while 26% of the people playing video games in the US are aged between 34 and 54. Assuming this demographic proportion is generally true for other nationalities on steam, we want to primarily target users from age 18-34 and secondarily target gamers age under 18 to maximise our potential market share.

Researching the market

What Platform is most favorable to publish as a small studio?

Most likely Steam, this platform gives us the highest chance in success due to steam's unique rating system that doesn't use a scale but a binary positive vs negative. This makes it so a 5.5/10 rating a user would have given on any other site is equally as valuable as a 10/10 rating. The platform then gives a ratio of positive vs negative rating which gives the clients the perception of a scale rating. This gives our game a higher likelihood to gain a positive rating, priming customers to have a positive perception of our game by herd mentality.

## What are favorable genres to make on Steam?

The primary data is provided by Video Game Insights ([VGI) pro](#) who scraped publicly available data from steam in 2022. The graphs below are various representations of the data. The data is curated to remove AA & AAA games by only including games with the "indie" tag and games that had less than 1,000 reviews.
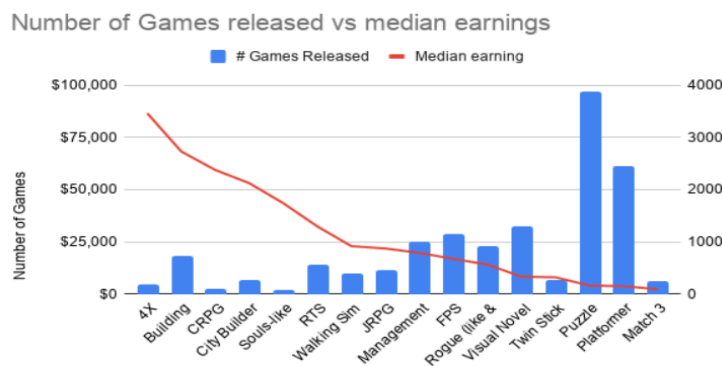
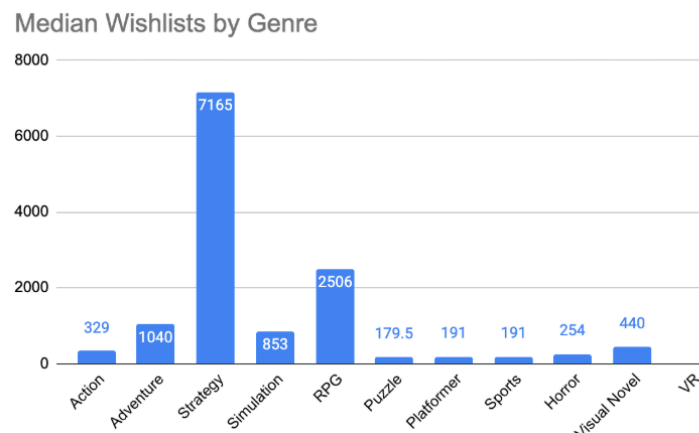(2019 - 2022 by Zukalous, [howtomarketagame.com](#))

This graph is a curated representation of the data from VGI pro highlighting the median earnings versus the number of released games. There are a lot of caveats in how the revenue is calculated but VGI uses a reviews based proprietary method to estimate the number of sales; taking into account regional prices, steam cuts, and returned products. Now what we can glean from this is that strategy games like 4x, building, city builders and the like that falls under the "Crafty-Buildy-Strategy-Simulation" as Zukalous likes to describe them is the most untapped market on steam. While this may be to an extent true, it's also worth noting that we are missing a couple of important tags on this graph that may change the picture a little. For instance "Co-op", "PvP", "Crafting", "Open World", "Base Building" are tags that are closely related to top performers here but are not included. Zukalus reasons that some of these tags are too inclusive to derive something out of them. Less popular games tend to get fewer tag suggested by its

community. Another point to note is that 4x games probably takes more effort to become a minimum viable product which could explain its low numbers and high income.

30%, 50% and 70% earnings per genre
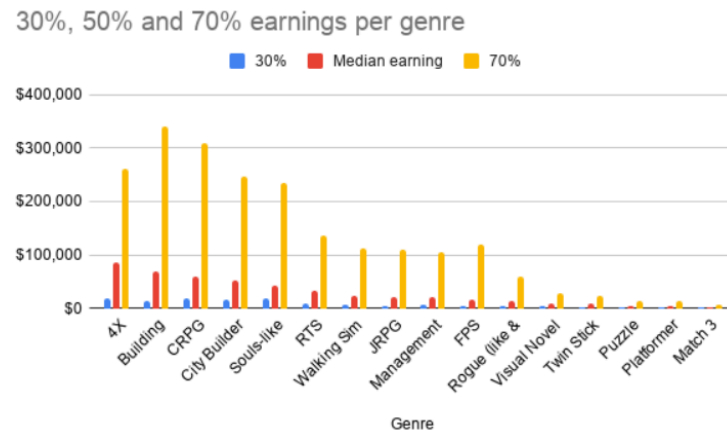
(2019 - 2022 by Zukalous, howtomarketagame.com)

This graph highlights the average earnings of games for the bottom 30%, the median, and the top 30% earners. While 4x has the highest mean earnings, other genres are seen to have the highest potential earnings.

Median Wishlists by Genre

(2019 - 2022 by Zukalous, howtomarketagame.com)

Earnings might have been too crude of a way to try to eyeball the climate of Steam's market, and so, a better heuristic might be to look at the median wishlists games earn under each respective tag. Here we see that strategy games dominate in wishlists, telling us that steam users are most often interested or open to strategic gameplay.
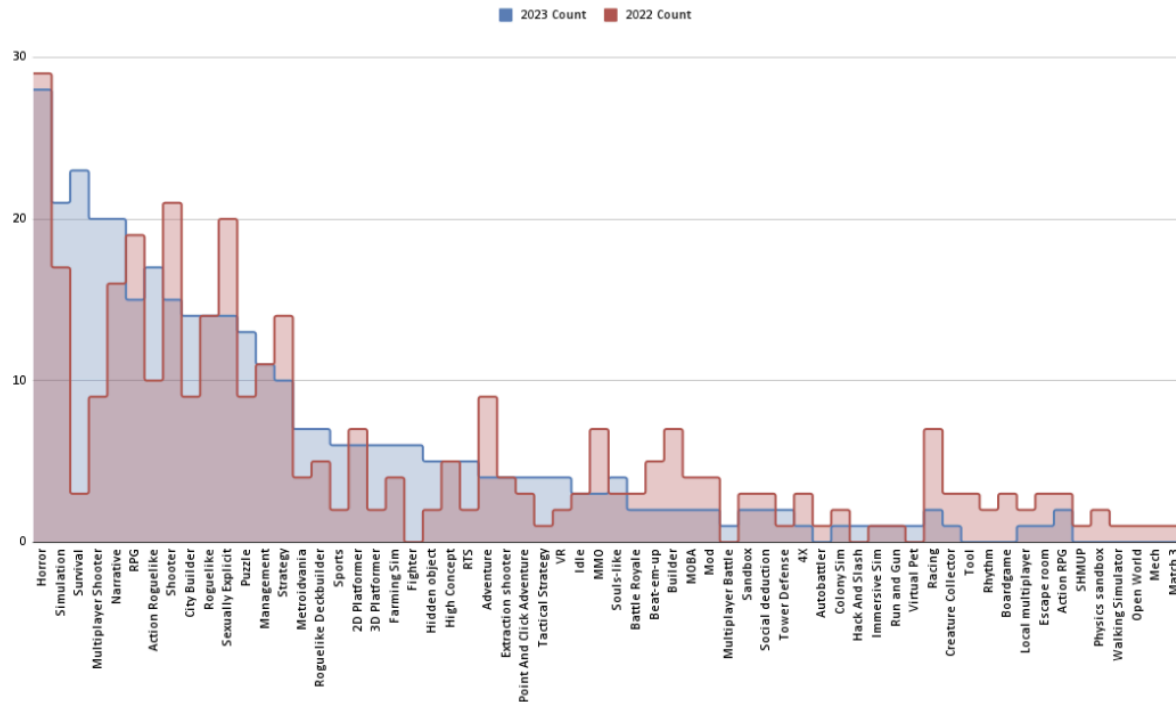
(2019 - 2022 by Zukalous, howtomarketagame.com)

Which genre of games had the most success in the recent past? This graph represents the number of games that obtained 1000 reviews or more in 2023 and 2022. The caveat is that this doesn't represent the proportion of games that failed versus succeeding, albeit questionable if that would be useful to know as different games have different production values and reason for failure for games are greatly varied. Having said that, the leading genres in this metrics are the "Crafty-Buildy-Strategy-Simulation" as well as Horror, shooter, Narrative , and roguelikes.

Genre	Earned 1000 reviews	Total released in 2023	Percentage that reach the top
Roguelike Deckbuilder	7	90	7.78%
Fighter	6	80	7.50%
Multiplayer Shooter	20	363	5.51%
Management	11	224	4.91%
City Builder	14	333	4.20%
Horror	28	679	4.12%
Metroidvania	7	226	3.10%
Simulation	21	691	3.04%
Farming Sim	6	201	2.99%
Survival	23	1,179	1.95%
Action Roguelike	17	941	1.81%
RPG	15	879	1.71%
Roguelike	14	1,096	1.28%

(Percentage of games that reached 1,000 reviews in 2023, by Zukalous, howtomarketagame.com)

Looking at the proportions of games that reached 1,000 reviews in each genre, we see Roguelike deck builders being the most likely to find its audience on steam, followed by fighter, multiplayer shooter, and management games less than 0.1% different from each other.

2025 Games that have earned 1000+ reviews by genre
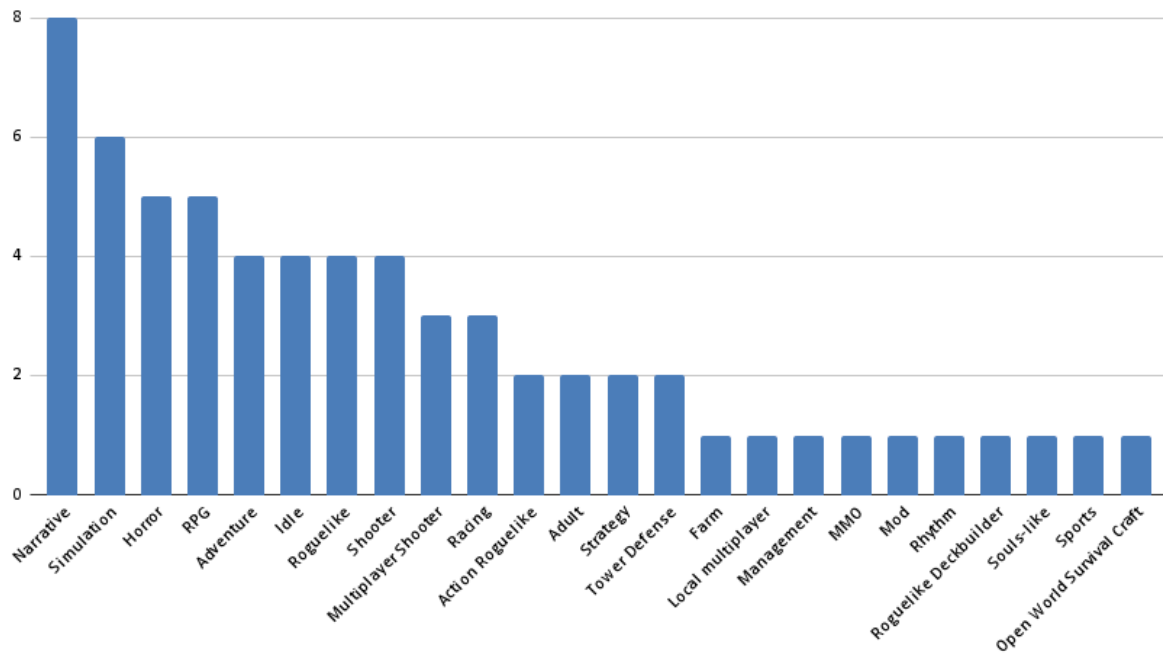
What are the latest trends? Currently in 2025, the games are finding the most number of successes are in the Narrative genre. The rest tracks with what we've seen to have success already. The caveat however is that most of the narrative so far supports simple chinese with the exception of one game, suggesting that this is a result of the chinese market on steam is growing for narrative games.

Marketing Strategy

Revenue

Our product will be a Paid-Game, with future revenue potential in merchandising and DLCs
The platform will be on steam which will be taking a 30% share on the revenue.

Overview

Here are a list of things our game can do to effectively raise the presence of our product online
with the aim to make it onto Steam's Discovery Que, aiming for at least 15,000 wishlists. It is
worth it to have a playable demo right off the bat, so creators are likely to cover your game and
gain a steady stream of traffic from their videos.

1. Launching a coming soon page with a trailer (marketing beat)
2. Putting a demo on itch.io and steam page
3. Running a kickstarter (marketing beat)
4. Organically getting coverage on Youtube / Twitch
5. Putting out social media post with trailer pointing to product
6. Join a steam festival (marketing beat)
7. Game Launch (marketing beat)
8. Affiliating with another game in the same category

Steam Discovery Que

The Steam Discovery Que (DQ) is a section on the user's steam store page that recommends
the user with 12 games the Steam Algorithm thinks match your play history based on tags of the
most regularly played games and other hidden heuristics. This queue is used by some of the
most engaged and hardcore steam users that would buy dozens of games a year, which are the
same people who will be most willing to give our game a try as an early adopter.

Steam Hides Games on Launch

Valve had issues in the past with shovelware and asset-flip junk game taking advantage of
steam's free traffic. Since nobody reviews or buy these games, valve decided to combat this by
creating a threshold on the number of legit purchases a game needs to start having it featured
on Steam's widgets.
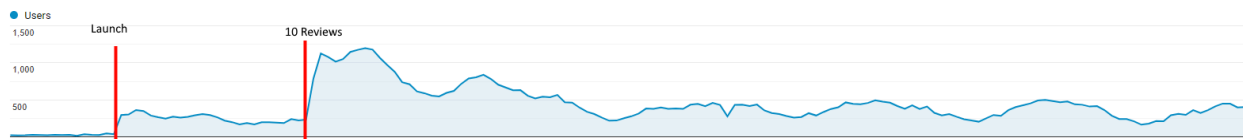
(Google Analytics of a Steam page right after a game hit the 10 reviews threshold)

What does it take to be featured in the DQ? Essentially, if your game gets enough traffic in a short enough period of time from outside steam (YouTube, Twitter, Tiktok, reddit, etc) and gets popular the algorithm will take notice of it and promote your game in the DQ.
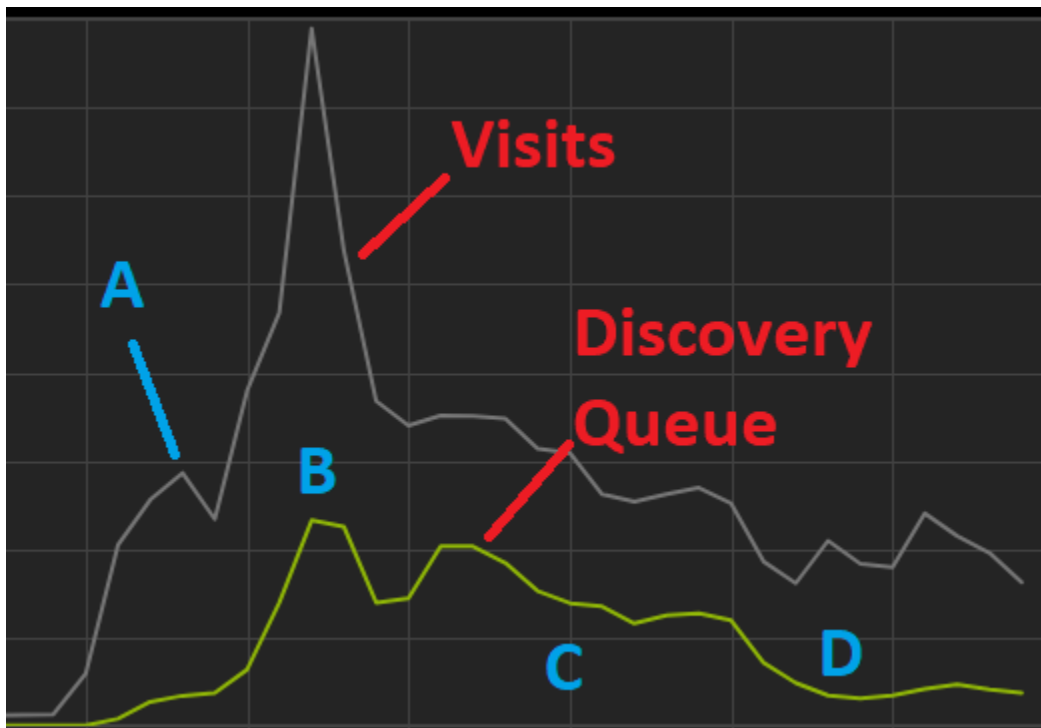
(Total Page Visits and Total Page Visits from Discovery Que from the game SteamWorks, howtomarketagame.com, 2023)

As you see in the graph above, the DQ "wakes-up" on point B after it gets traffic from outside sources on point A (Each cell represents a week, and DQ adjusts on a week delay). Then after the game gets featured on the DQ at point B, the page after the bit after point A gets a surge of traffic along with a positive feedback loop as all the steam widgets start promoting the game as well. The DQ continues to promote the game for around 2 weeks, until it dips but it generally keeps a baseline which is higher than previously.

What does it take to activate the Discovery Que?
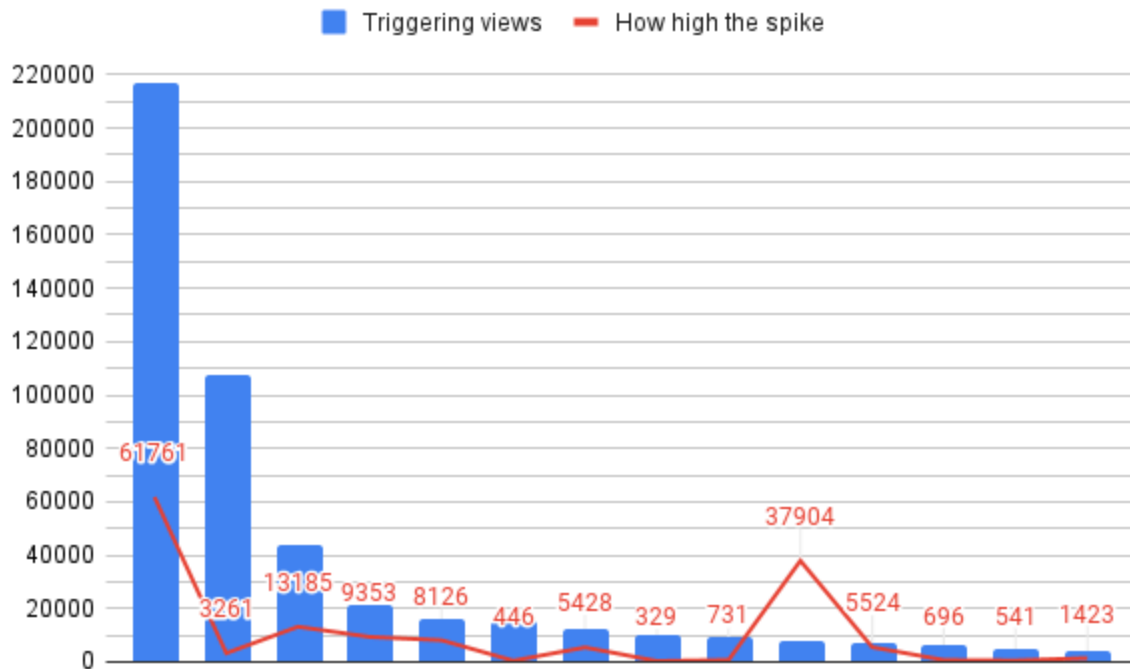
(Number of views earned during the 7-day period before the game's first major peak in DQ from 14 games, howtomarketagame.com, 2023)

The average visits a game had to trigger the DQ was 34553 visits, while the median is 11202. The lowest number of views a game got and still triggered the DQ was 4347. Although there are some outliers, it is safe to say that if you get around 10,000 views you are likely to have placed your game on the DQ. However, steam has commented in the past in 2024 on their YouTube Channel Steamworks Development in their video "Steam Visibility: How Games Get Surfaced to Players" that they didn't trust "Visits" a game gets on their page as a good representation on the quality of the game. This makes sense as it's not hard to imagine that it is easy to utilise bot farms to generate traffic artificially to gain the system.
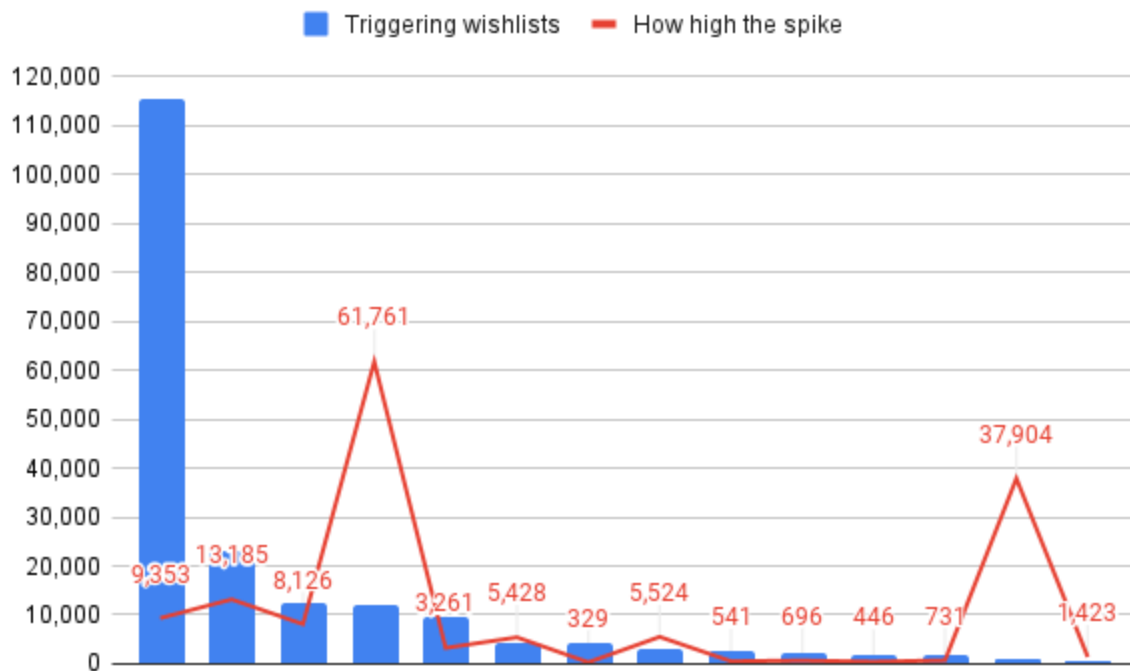
(Number of wish-lists earned during the 7-day period before the game's first major peak in DQ from 14 games, howtomarketagame.com, 2023)

This second graph looks at the number of wishlists during the 7-day period prior to the game's first DQ spike. Observing the graph, it seems like around the 1500 to 4000 mark is where the majority earns their first DQ spike. Again, how high the spike is does not seem to correlate much with the wishlists as well.

Days in the DQ
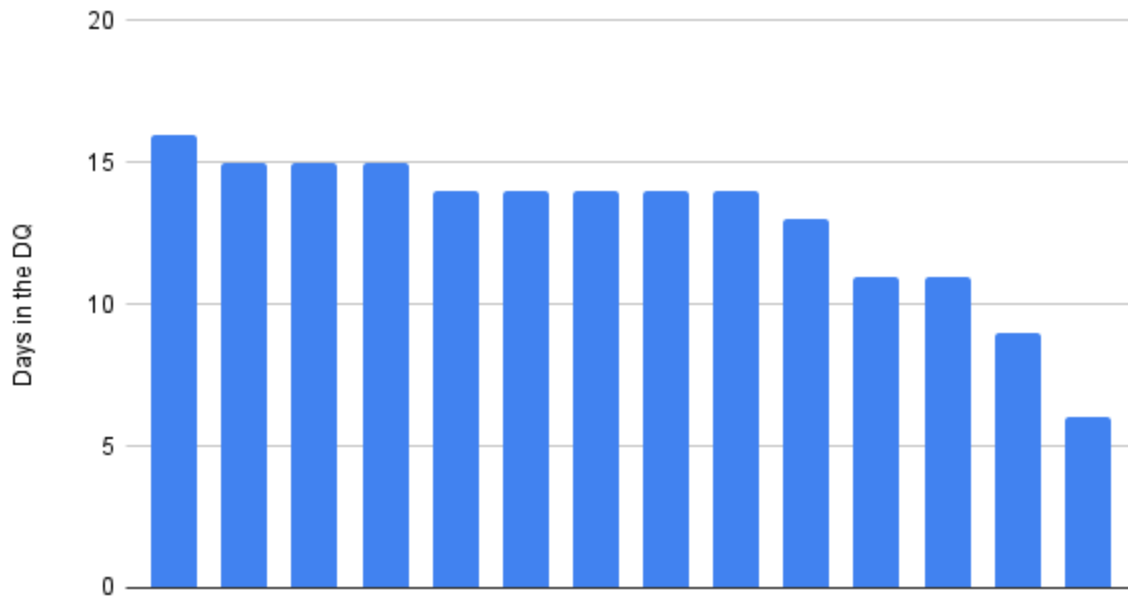
(How long the gane remained in the Discovery Que after the first spike until the dip,howtomarketagame.com, 2023)

On average, games that do make it to the DQ will stay featured for around a little less than 2 weeks on average

Cases games don't get DQ

What about the games that do get the views and wishlist but don't get the DQ as expected? The Steam Visibility video previously mentioned that DQ features games based on their ranking on their specific tag group. This means that if there is another game that is going more viral than you in the same month in the same category the DQ will prioritise that game. There is also the fact that the limited slots DQ has is prioritised for released games, so the competition for pre-release slots are more fierce.

Discovery Queue per Month
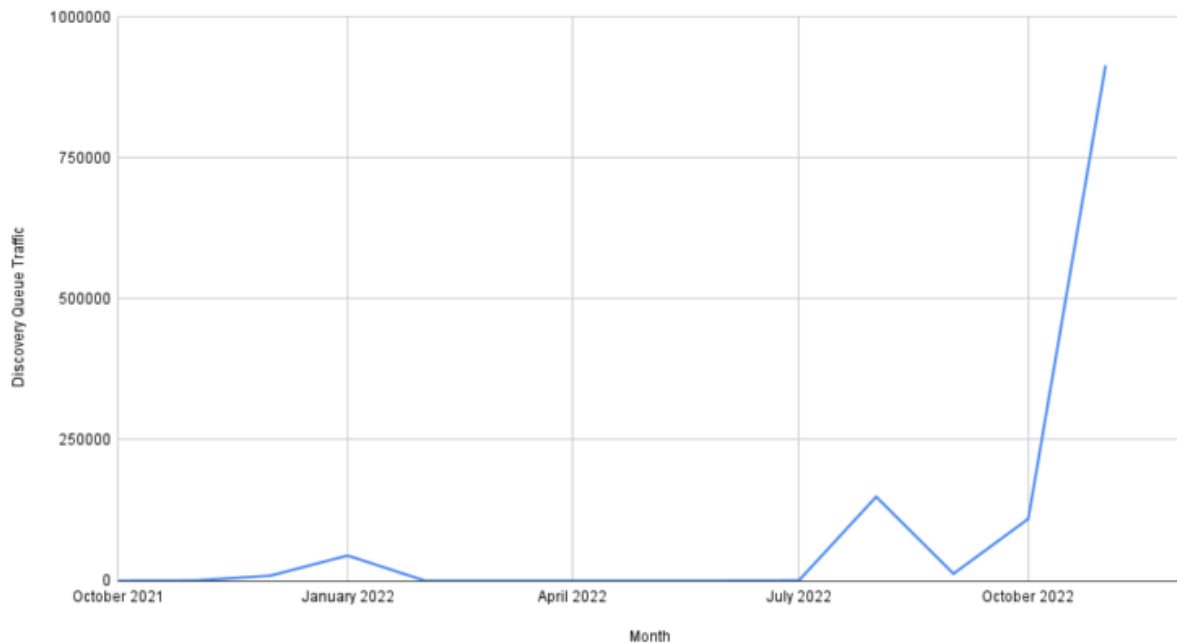
(ZERO Sievert Discovery Que per Month, 2023)

## Launching a Coming Soon Page

This should be treated as a "Marketing Beat" something we the developers can do to gain an influx of attention to our game. The best way to go about this is to build up on this moment and take the necessary steps to get as many attendants for this grand opening.

Things we can do:

      Reach out to the press ahead of time to see if they are interested in covering it.

      Get everyone you know to share the trailer of your game.

      Make a cut-down of the trailer to post on social media.

An excellent example of a game seeing success in doing this right is Choo-Choo Charles (CCC) solo developed by Two Star games who managed to gain 85, 000 wishlists in the span of a little more than 4 weeks since they revealed their game to the world. The developer revealed their

game to the world first through an announcement on X with a 30 second clip of their game.
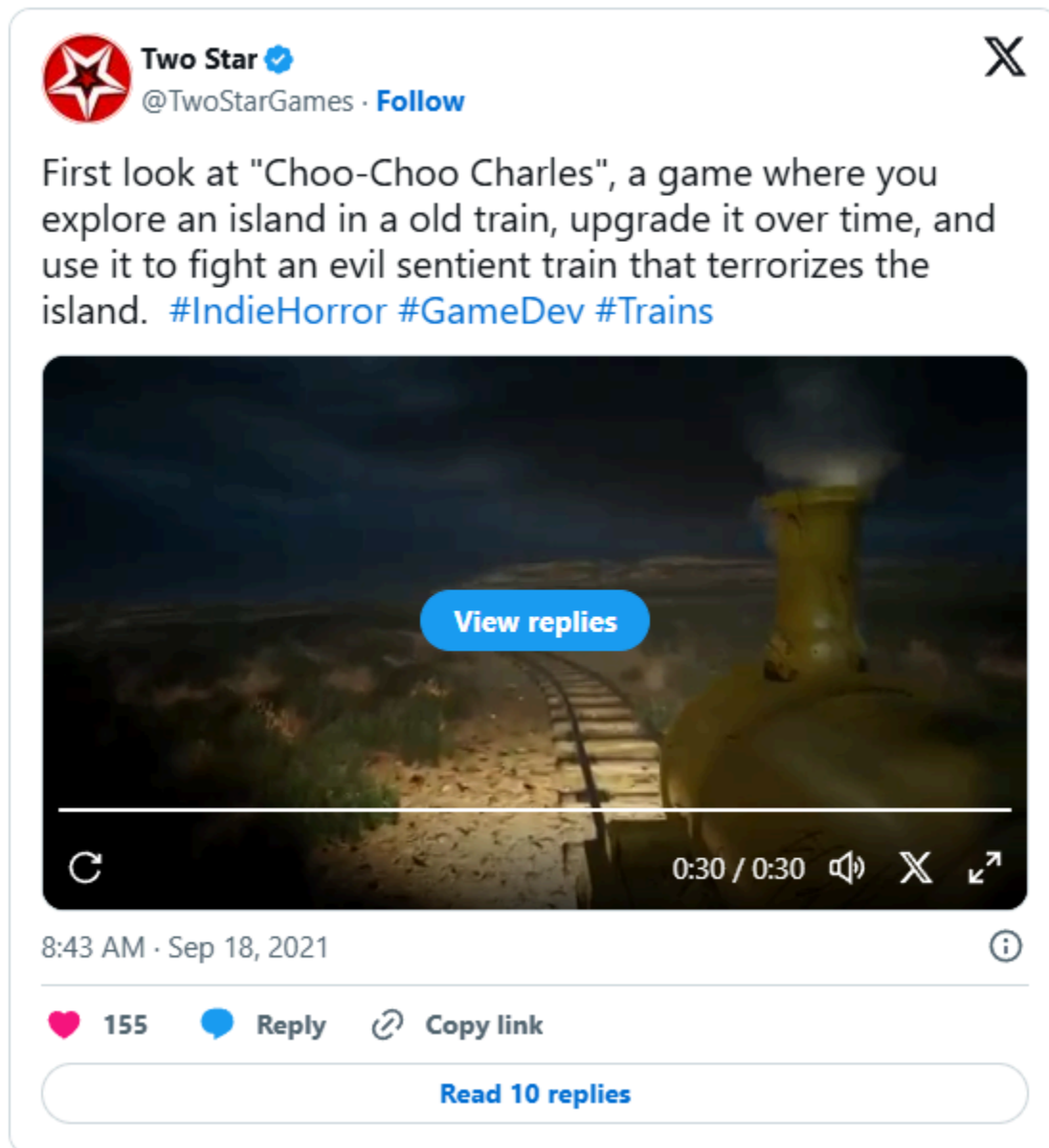
The developer did not include a call to action because they didn't have a steam page yet at the time. The developer mentioned that their first tweet only harnessed around 4,000 impressions at the time on their secondary youtube channel Scientia Ludos. The developer made a couple more tweets after this initial one which even featured the main USP of their game and gained a couple more retweets and visibility but not all that much.

On September 23rd however, the developer published their Steam page and in a span of a week earned around 500 wishlists which is apparently typical as Steam gives games some free visibility when you first post your page (howtomarketagame.com, 2023).

What really propelled CCT's to becoming viral was when the developer posted a trailer on their youtube channel and gained around 8,000 subscribers from that video alone.
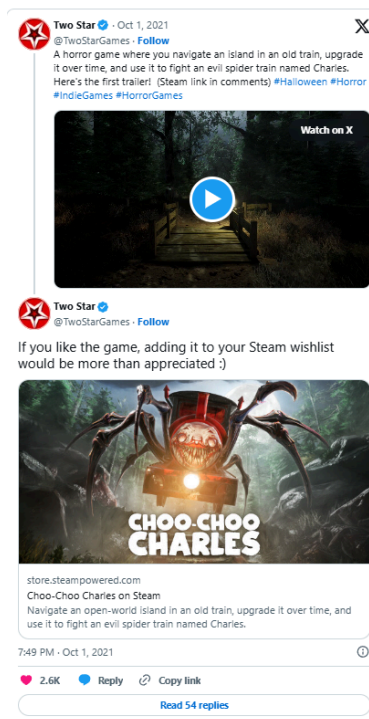

At the same time the developer posted their trailer on X. To navigate around X's penalty of including a link that would send users outside of X, the developer played it smart and broke the tweet into two pieces. The first tweet includes the announcement with the trailer embedded into

the tweet, and the second tweet was posted immediately after replying to the first tweet with a call to action to visit and wishlist on the steam page.
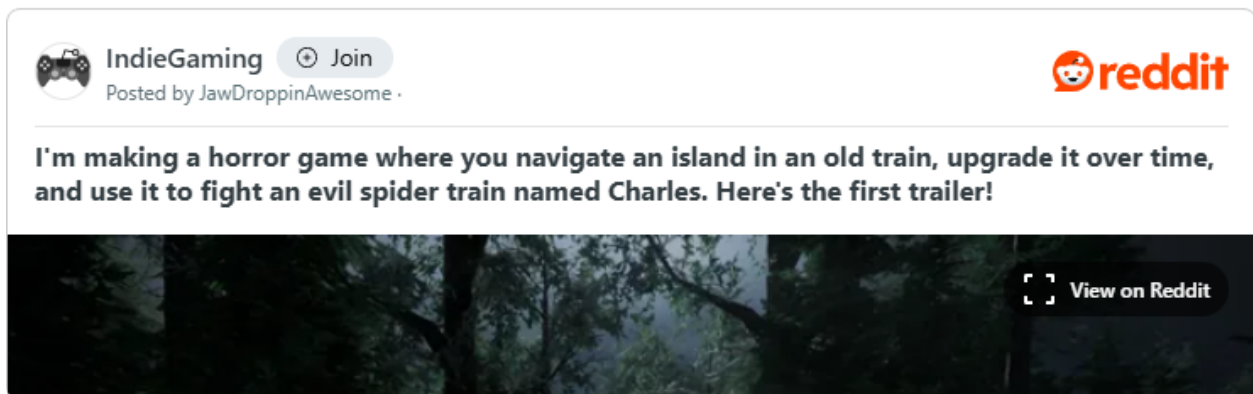

The developer also posted on r/indiegaming and on r/indiegames, earning him a total of 4,000 upvotes and likely more than double the value in impressions it made.

All the hard work paid off as IGN and Gamespot both re-uploads the trailer on their own respective channels, exposing the game to the huge subscriber base of both of these channels. By the second week of CCC on October 1st the game had earned 14,000 wishlists.
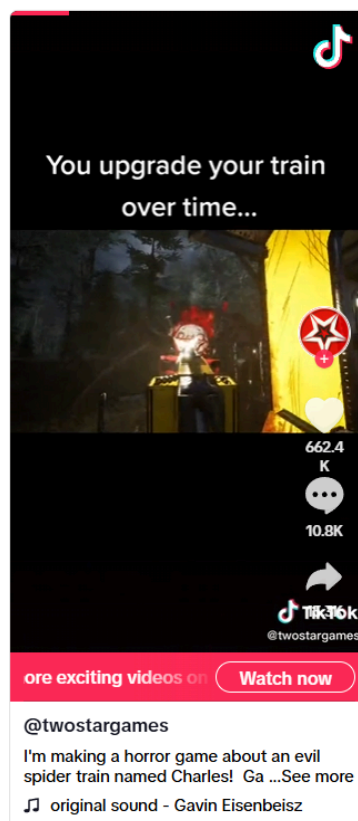
5 days after the reveal of the trailer, the developer posted the trailer on Tiktok which also went viral and earned 1.5 million views. According to the developer, they didn't wait to post the trailer

for any strategic reason and simply had technical difficulties in uploading the video and science so many people were already re-uploading the game, they took their time in doing so. Either way, the Tiktok earned the game 11,000 wishlists on the day of the upload, making it a huge success.
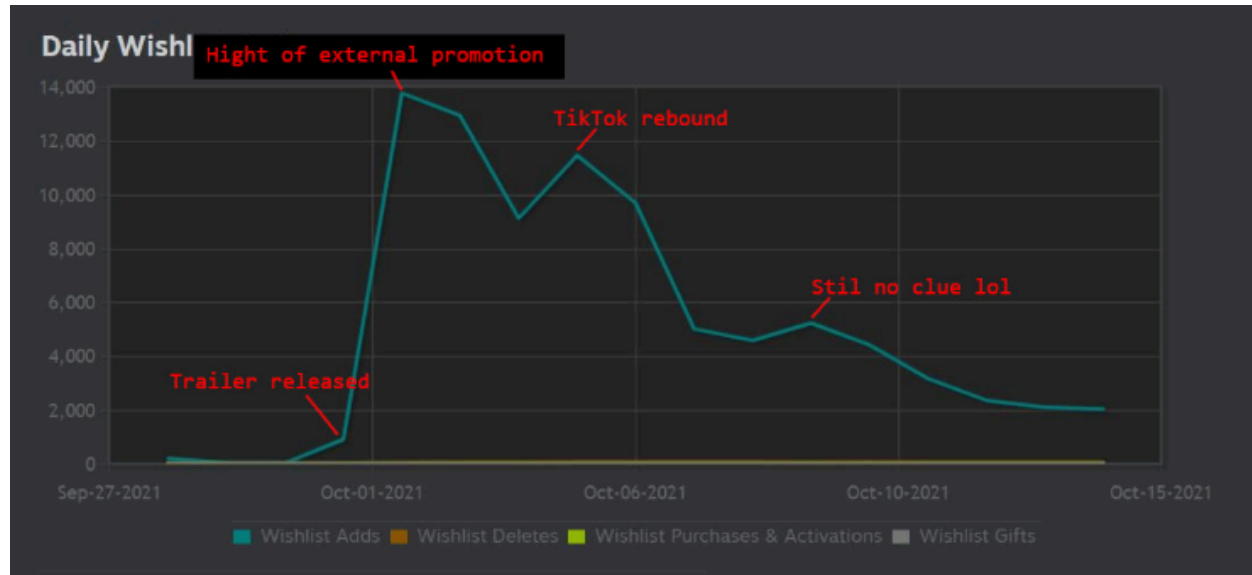
Here is the chart the developer published of their game, highlighting the success of their trailer on social media and the tiktok. While it is not clear if there is any merit to spacing the announcement between different platforms, this demonstrates that it can be done if needed.

What can we learn from this? Honestly, this all feels like things any developer would reasonably come-up with when the time to market their game comes up. If anything it highlighted the importance of having a good trailer for your game, and in this case most of the success can be attributed to the 1 minute trailer.

What made the trailer so good? A trailer is a pitch for customers, and as Sakurai from Nintendo presents in their 68 second video titled "Presenting is Speed", claiming that a good presentation covers all essential ideas with good tempo. If you break down the trailer of CCC it looks like the following, doing exactly that.

00:03: Running in the woods and looks back to see threat chasing player
00:14: Core gameplay mechanic of using your own train to run away and shoot at the threat
00:24 - Different environment and map feature, communicating open-world exploration
00:27 - Mechanic - Shown pulling a lever to switch lain of tracks
00:39 - NPC interaction
00: 45 - gameplay of threat passing by the player
00:59 - Mechanic - hunting for scraps and upgrading your train
1:09 - Trailer ends by getting chased and shooting the threat

The game does a great job to clearly showcase the game's concept to its viewers in the first 10 seconds and what the gameplay is about in the remainder of the video. It's easy to say that the developer put their game in a great position to maximise its potential to go viral. Having analysed all this, one question remains on how the game had gotten so much potential to go viral? The developer themselves explains the answer to this.

As the blogger Chris Zukowski comments in howtomarketagame.com "Too often indies focus on promotion as the reason for success or failure", and that "Probably a good 80-90% of your game's success depends on the type of game you make".

"Thomas Feeds" is a video from 2021, the second video on a horror take of Thomas the Tank engine on the channel with 16 million views as of 2025. The channel has similar content posted between 2020-2023 that accumulates to a total of 41 million views in total. The creator of CCC acknowledged that this was indeed his inspiration on making the game in this pcgamer article.

Ultimately, the success of the trailer can be attributed because the game had the following attributes to go viral:

- The game is made in Unreal and looks great.
- Horror Games are a very viable genre as demonstrated in the total wishlist graph.
- It plays into the specific sub-genre of "horror game about your childhood memories" like in Five Nights at Freddies, LunchLady, and Poppy Playtime which exploits nostalgia.
- It's funny and makes you want to share with friends

The developer of CCC didn't invent a viral game out of thin air, he saw a trend on something that was already viral

Appearing in a Festival

Festivals not only give you the traffic you need to your store page but a lot of developers from the howtomarketgames.com survey reported a positive DQ increase after exposure from the festival.

"Was part of Steam's Visual Novel Fest and Love, Ghostie was featured at the very bottom of the page in the Upcoming section. There were four games featured on the first "page" of that section and "Love, Ghostie was there the whole festival, which resulted in a lot of wishlists. First day of the VN fest resulted in 2000+ wishlists alone.

The week prior was also fortunate due to being part of the Wholesome Games sale and Tiny Teams, which resulted in ~2000 wishlists total."

-Janbeh Games

Make sure the festival has an online version, otherwise it's just not worth it

Steam Next Fest

The Steam Next Fest happens 3-times a year and is a method to gain around 1,000 - 3,000 wishlists just by being featured on their. You can get around 40,000 wishlists if you make it to the front page (howtomarketagame.com, 2023).

There are two primary ways to making it into the list:

1: Collecting 3000 wish lists within the 2 weeks before the fest
2: Start the festival with at least 150, 000 wishlists

Reaching out to Streamers / Content Creators

Getting content creators to cover your game is a great way to establish a steady stream of traffic to your store page. Getting a playable demo out is the best way for creators to organically pick-up your game but you can also reach out to some of the more prominent one like below:

(E-mail sent to SplatterCatGaming)

This is an example of an email that got praise from the content creator for convincing them to play the game in their [video](#) covering the game.

It is noticeable how simple and straightforward it is,

Partner, don't compete with other indie devs

The worst nightmare as an indie-dev is the notion that someone beats you to the market with the same unique idea, and that they will suck all the demand for that kind of game you've been working towards. Here's an example of this happening with the developer of Peglin:

But instead of being adversarial, the other developer responded:

This was the start of a mutually beneficial relationship in which they would promote each other's games. Here's what the co-developer of Roundgards had to say about this:

"We stayed friendly at all the digital conventions we were both at, pointing people to his booth and vice versa. When we coordinated the Roguelike Celebration steam feature we reached out to make sure he got his game in, for example. So we had been lightly/casually helping each other out for a while."
Bob Roberts co-developer of Roundguard

The whole arrangement was beneficial for the two as Peglin was getting ready to launch their game, RoundGard had been working on their 2.0 update and coordinated to launch their update close to when Peglin launched, utilising Steam's Update Visibility Round.

Peglin and Roundguard also agreed to make a Bundle of their game which would show under both of their game pages:
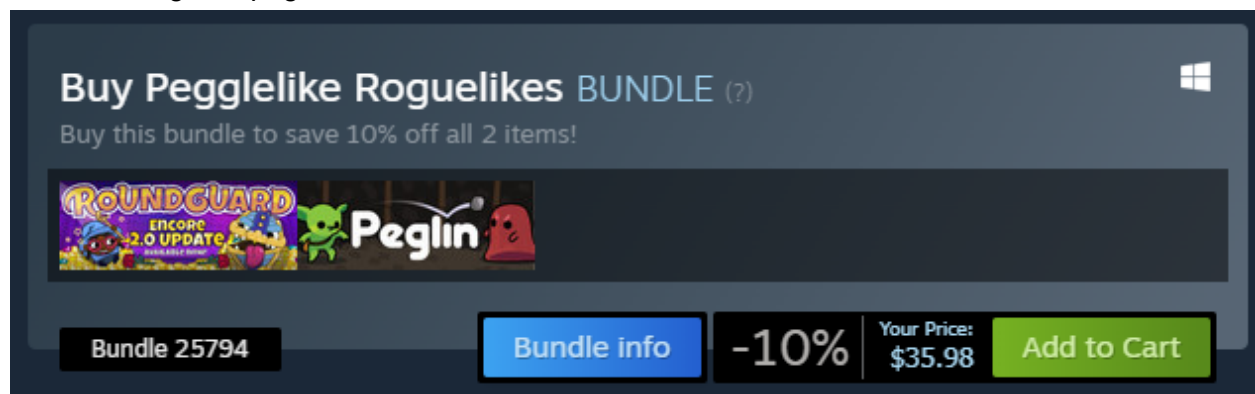
The effect of this partnership is clear from the statement from Roundguard "About 40-50% of our steam page visits over the last few weeks came from the bundle page or the bundle preview widget on Peglin's page."
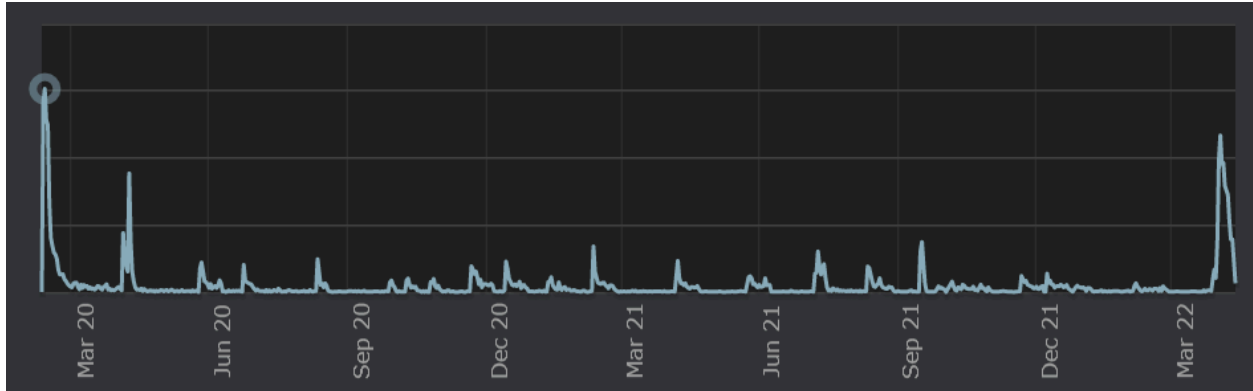
Round Guard was a game that was released for over 2 years and thanks to this partnership they saw the highest sales period since launch, nearly doubling the exposure that they would have had of only relying on steam's update visibility.

"This resulted in people commenting on both our steam pages with good will about how nice it is that we're promoting each other by the way. So players also like it when they see us being supportive of each other!" - Bob Roberts co-developer of Roundguard

It seems like it not only helps the developers but is supported by the player base as well, giving the two parties a positive impression with their players.

In essence, collaborating is a positive sum game where both developers and audiences all benefit. Furthermore, superfans of each game will eventually be finished with the game and move on to look for more that are similar; making this a good way to bring superfans from another game to yours and vice versa.

Should you focus on Hook or Gameplay?
The source of most of his wish lists came from streamers who would play Peglin weekly. Peglin was so fun that people were willing to play the game over and over again. So the hook is only as good for luring people into trying your game but it does no good if people leave right afterward.

Viewership per genre Youtube Analytics

The goal of this research is to measure the differences in the average viewership on Youtube between game genres in their first 6 months since release from games published by Steam.

Data gathering methodology:
To gather the necessary data, I have made a python script with the help of Open Ai's GPT-4o model that uses Yoube's Data API v3 that allows for queries to return public data about the videos. I have used Joakim Arvidsson's data set that scrapped all the game's data on steam and SteamSpy (website that additionally estimates statistics like game sales and playtime

based on public information) as of 15th of September 2024 as a way to allow my script to automatically curate and look up for games on youtube. To divide games into categories, instead of using Steam's Genres which are often too inclusive, I use the game's tag which are selected by the community which are often more apt to the game's genre at large. The program searches for YouTube videos with the official game name in their titles, possibly missing some videos made about the game. It will gather all the videos from the first 6 months since the official release date on steam.

I further curate the results to the following:

- Game Needs to have been released between from 2015 to February of 2025
- The Game needs at least 1,000 reviews on Steam
- The videos needs to have 1,000 views or more
- The search ends after 5 consecutive videos below 1,000 views are retrieved
- (Fail safe) search also ends when 5 videos that's already been processed are retrieved

The genres looked a are:
"Deckbuilding", "4X", "Building", "Souls-like", "RTS", "City Builder", "CRPG", "Walking Sim", "Management", "FPS", "Building", "Rogue-like", "Visual Novel", "Puzzle", "Platformer", "Horror", "Sandbox", "Survival", "Co-op", "Physics", "Linear", "Nonlinear", "Story Rich"

The genres were selected, prioritising ones that saw the highest profit margins, the most success in having games reaching to 1,000 reviews, and highest median wishlists.

Here was the results:

Genre	Average Views
Walking Sim	588,049
Horror	170,553
Puzzle	112,761
Deckbuilding	93,696
Platformer	93,501
Co-op	93,046
Physics	92,829
FPS	91,569
Story Rich	84,947
Survival	82,238
Sandbox	80,323
Visual Novel	66,939
Nonlinear	64,571
Souls-like	60,290
Linear	58,778
RTS	56,400
Building	55,067
Management	54,930
Rogue-like	32,510
City Builder	31,197
CRPG	21,044
4X	16,786

Now, immediately walking simulators having the highest views on average was confusing and hard to believe, so I looked at the raw data for outliers.
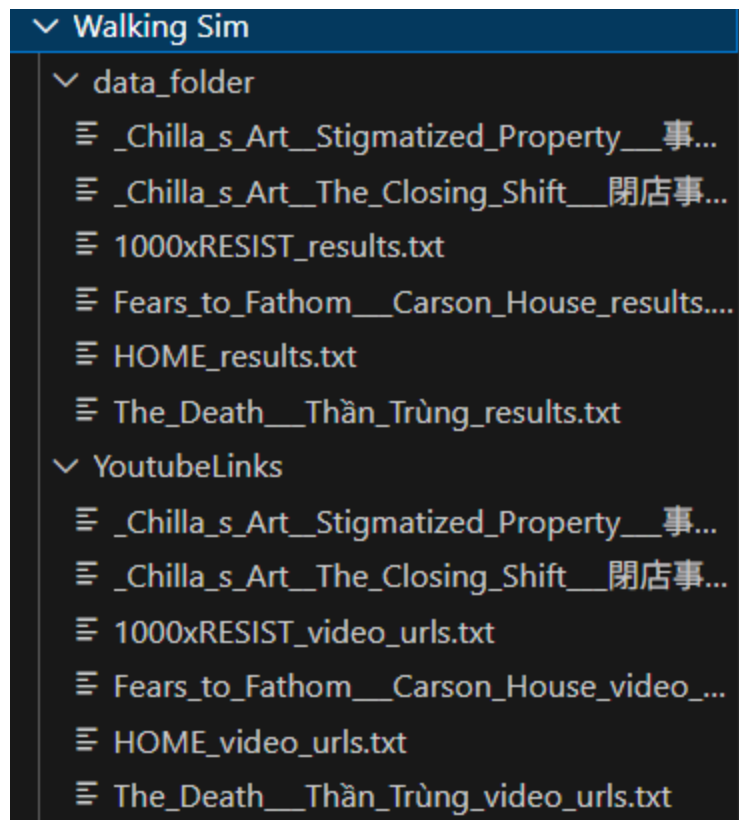
This genre has a very small sample size, which would be reason enough to exclude it as part of the analysis but what stood out to me was the game "HOME" which I immediately guessed as the culprit.

Games that are named after common words like "home" are troubling since the subject of the search query will always prioritize the most common usage of the word. Having the search be "home the game" can fix the issue but implementing an algorithm that can selectively detect single worded games and stitch "-the game" was just another level of complexity I wasn't willing to do. So this leaves me with simply having to remove games with similar issues manually.

This is the final data after curation:

Genre	Average Views	Average Median Views
Horror	170,553	38,995
Walking Sim	110,257	9,006
Puzzle	109,137	24,056
Deckbuilding	93,696	6,230
Platformer	93,501	13,638
Co-op	93,046	16,185
Physics	92,829	12,509
FPS	91,569	20,705
Story Rich	84,947	16,185
Survival	82,238	11,562
Sandbox	80,323	17,025
Visual Novel	66,939	16,528
Nonlinear	64,571	10,584
Souls-like	60,290	11,629
Linear	58,778	9,340
RTS	56,400	11,849
Building	55,067	11,364
Management	54,930	12,619
Rogue-like	32,510	7,529
City Builder	31,197	9,176
CRPG	21,044	10,208
4X	16,786	4,591

We can ignore "walking sim" and "CRPG" for having less than 15 samples, with 4x having the lowest number of samples among the list at 18. It is no surprise that horror games do well in viewership, the popularity videos get from internet personalities playing them are apparent, and the lead in both average and median views reinforces that.

Now puzzle games being second was a surprise, the impression was that people tend not to like watching puzzles to be solved. Digging through the raw data, I've noticed a lot of puzzle games are not only puzzle games most of the time with a great portion of them only being secondarily a puzzle game. There is also the fact that these games have very low unique numbers of channels covering their videos proportional to their viewership. Looking further, it seems like

these games are getting covered by the same gaming channels which specialise in puzzle and strategy games such as "Lets Game it Out" and "Blitz" just to name a few.

Deckbuilding is among the most watched, but having a disproportionately low median suggesting a lot of its views are coming from the top performers. It is also true that it has a high number of unique channels covering the game on average, proportional to its views. Looking at the raw data, you can see a lot of small channels that either only cover one game or multiple of the same genre exist mostly as a hobby. There is also the fact that some channels consistently produce videos of the game irrespective of the viewership for weeks and months after the game's initial release.

FPS also have high median viewerships. The reason is opaque to me, but my guess is that shooter content attracts its own

CRPGs, City builders, and 4x games have the lowest interests with the lowest median, having very low prospects of getting coverage unless it becomes one of the hits in its genre.

In conclusion, making a horror game feels like an easy way to gain more traction thanks to the pure appetite of the market. Puzzle and shooting also feel like solid choices, although I'd be wary of making a purely puzzle game as that wasn't the unique selling point of most of the games I saw in the category. Deck Building seems to have a passionate community covering these games which can assure a better chance in getting the initial traction. Physics is also a promising design feature that can be adopted and worked with for designing the game.