



NARRATIVE ARCS

# Leveling Up

Why video games are the new frontier for Hollywood

A pixelated, retro-style illustration of the Hollywood sign. The sign is white with a black outline and is set against a backdrop of a brown, pixelated hill. The hill is covered with green and yellow pixelated bushes and trees. In the background, there is a blue sky with white pixelated clouds and a few white pixelated birds. A lighthouse with a red and white striped top is visible on the right side of the hill.

HOLLYWOOD



# Once maligned by critics, video game adaptations are finally having their moment

From Joel and Ellie to Mario and Luigi, the characters of video games—and the universes they inhabit—have long enthralled fans across the globe. Recently, however, more and more of these characters have begun to make the jump to movies and TV.

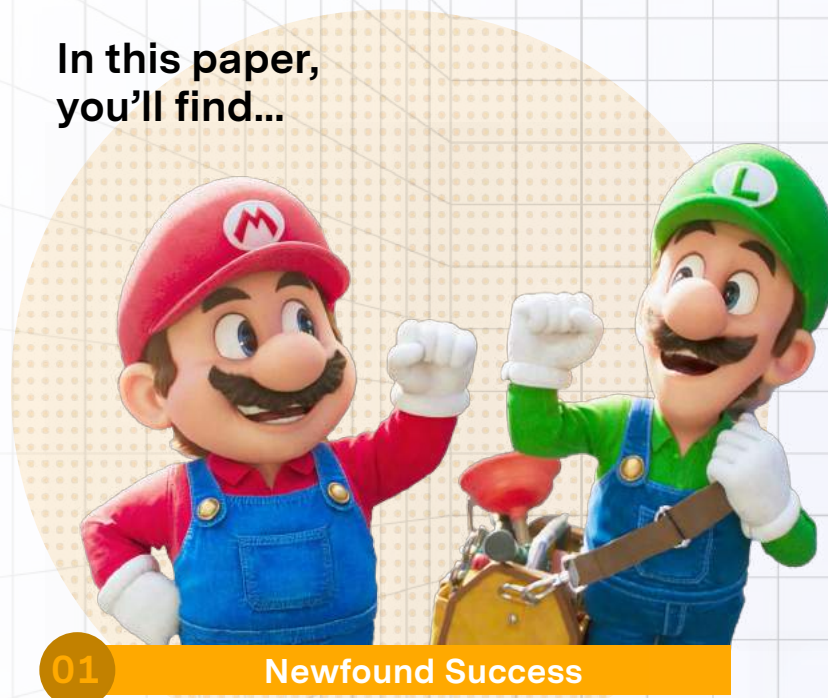
For decades, video game adaptations were looked down on by Hollywood. Profitable gaming adaptations were outnumbered by commercial flops—and even the more successful adaptations tended to receive, at best, a lukewarm response from critics. Many in the industry assumed that movies and shows based on games would always struggle to cross over and appeal to audiences outside the core fan bases of their franchises.

But now, those long-standing assumptions are being turned on their head. Movies like *The Super Mario Bros. Movie* and *Five Nights at Freddy's* have shown that gaming adaptations can find success at the box office, while TV shows such as *Fallout* and *The Last of Us* have proved hits with critics and audiences alike.

The question remains, however: are these recent examples exceptions to the rule, or do they represent a genuine and sustainable shift in the entertainment landscape? Are we truly on the cusp of a new era in which gaming adaptations can find consistent success in theaters and on streaming platforms? Could video game adaptations, as some have suggested,<sup>1</sup> even supplant superhero adaptations as the dominant trend in Hollywood?

1. Jason Schreier, "In Hollywood, Video Games Are the New Superheroes," Bloomberg, May 10th, 2024

In this paper, you'll find...



## 01 Newfound Success

**The factors behind the recent surge in commercially and critically successful video game adaptations**

Mario and Luigi, *The Super Mario Bros. Movie*, Universal Pictures

In this paper, we'll unpack these questions, identifying the key factors that are driving the current rush to adapt gaming IP to other mediums. We'll explore the increasing sophistication of video games as a storytelling medium, the strategic evolution in adaptation approaches, and the profound impact that adaptations can have on both the entertainment industry and the gaming community. And we'll offer concrete takeaways for game publishers, movie studios, and streaming services seeking to maximize the reach and impact of movies and TV shows rooted in gaming IP.

## 02 Optimizing Adaptations

**How studios, networks, and streaming services can maximize the impact of their gaming adaptations**

Ellie and Joel, *The Last of Us*, HBO



## 03 Franchise Health

**The long-term impact that gaming adaptations can have on franchise health**

Geralt, *The Witcher*, Netflix

### AT A GLANCE

Three key takeaways

## 01

The recent wave of commercially and critically successful gaming adaptations has gone a long way towards recalibrating consumers' expectations for these kinds of projects. However, many non-gamers remain skeptical when they hear that a new movie or TV show is based on a gaming franchise. Clearly, gaming adaptations can become crossover hits—but the bar for quality is a high one.

## 02

When adapting video games to new mediums, creators need to balance faithfulness to the source material against the need to make the content accessible to mass audiences. To do this, they need to have an acute understanding of the inherent strengths and limitations of video games as a storytelling format.

## 03

While it can be difficult to convince viewers to go directly from watching a TV show or movie to playing the game it was based on, strong adaptations can still have a profound impact on the health of gaming franchises. In particular, adaptations can deepen fan investment, turning casual players into committed franchise ambassadors and evangelists.





# It's increasingly clear that we're in a golden age of video game adaptations

Until recently, conventional wisdom in Hollywood was that adapting video games to film and TV was an inherently risky proposition.<sup>2</sup> While a handful of gaming adaptations were able to pull in respectable numbers at the box office—such as *Warcraft* (2016) and *Prince of Persia: The Sands of Time* (2010)—even these projects often struggled to turn a profit against their production and marketing costs, and were largely derided by critics. And for every hit, there were plenty of misses. Most infamously, that includes the series of critical and commercial flops helmed by Uwe Boll, such as *Alone in the Dark* (2005) and *Postal* (2007), many of which have since been cited as being among the worst movies ever made.<sup>3</sup>

Today, however, the situation looks remarkably different. To industry insiders, it's becoming increasingly clear that **movies based on video games can reliably turn a profit in theaters, or even become true four-quadrant hits.** This shift was driven home by the success of *Uncharted* (2022), the two *Sonic* movies (2020 and 2022) and, most significantly, *The Super Mario Bros. Movie* (2023). The latter became the first ever video game adaptation to gross over \$1 billion at the worldwide box office—tripling the previous record set by *Pokémon Detective Pikachu* in 2019.<sup>4</sup>

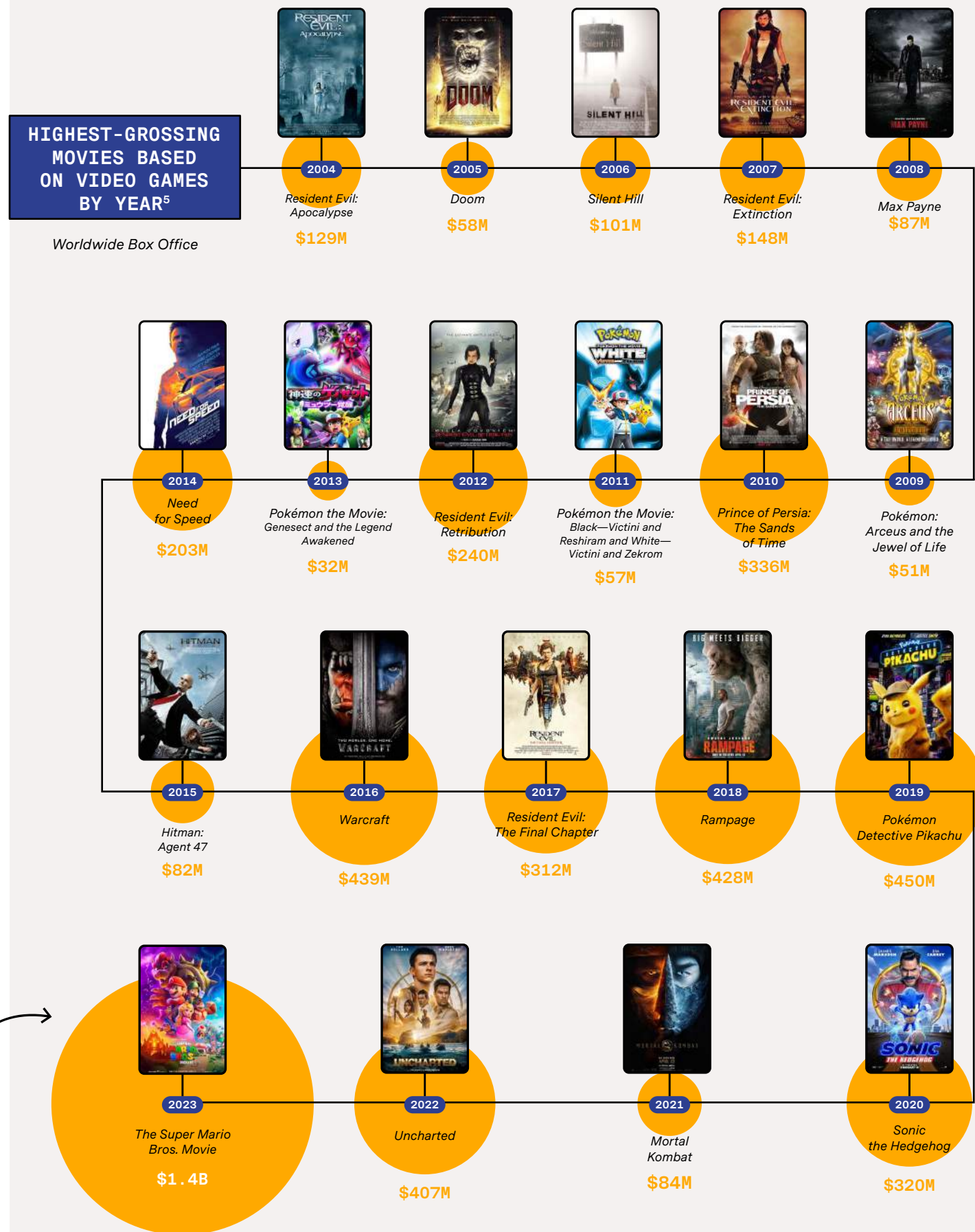
And it's not just that video game movies are making more money: they're also more diverse than ever before. In the decade spanning 2004 to 2013, over half of the highest-grossing video game adaptations came from just two franchises: *Resident Evil* and *Pokémon*. While those properties have continued to find theatrical success in the decade since, they're now just two of many gaming franchises that have proven themselves at the box office.

2. Keza Macdonald, "Movie adaptations of video games are still mostly terrible. Why has no one cracked the code?", *The Guardian*, March 29th, 2018  
 3. Ben Child, "The 'world's worst director': are Uwe Boll's movies really that bad?", *The Guardian*, October 28th, 2016  
 4. Kyle Chayka, "The Stupefying Success of 'The Super Mario Bros. Movie'", *The New Yorker*, May 4th, 2023  
 5. Data from [Box Office Mojo](#)



Jill Valentine, *Resident Evil*, CAPCOM

**The Super Mario Bros. Movie became the first ever video game adaptation to gross over \$1 billion**





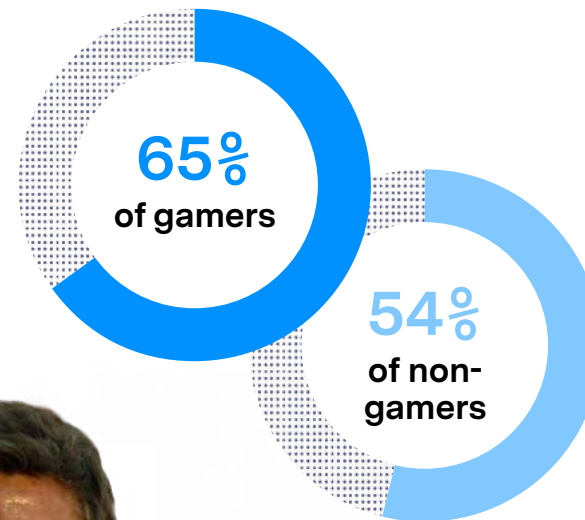
In the wake of *Mario*'s success, studios are now hot in pursuit of the next breakout hit. As of May 2024, there are movies slated for release or in various stages of development based on *Borderlands*, *Minecraft*, *The Legend of Zelda*, *Gears of War*, and *BioShock*, among many others, as well as new cinematic installments planned for the *Sonic* and *Five Nights at Freddy's* franchises. With superhero movies finally relinquishing their long stranglehold over the box office, some in the industry have even gone so far as to suggest that **video games may be on the cusp of supplanting comic books as the dominant source material for mass market blockbusters.**<sup>6</sup>

It's on the small screen, however, where the about-turn has been even more dramatic. Before 2021, video games were almost never

adapted into TV or streaming shows (with the exception of anime and anime-inspired adaptations of Japanese gaming franchises such as *Pokémon*, *Digimon*, and *Castlevania*). Since then, however, we've seen a glut of gaming adaptations for TV networks and streaming services, many of which have received an enormously positive response from critics and audiences alike.

In Rotten Tomatoes' latest ranking of the top 10 shows adapted from video games—based on a combination of audience score, critics' score, and total viewership—all but one, the second season of *Castlevania*, debuted in or after 2021. Most notably, HBO's *The Last of Us* proved to be one of the biggest breakout hits of 2023, becoming the network's most successful show since *Game of Thrones* and taking home eight awards at the Emmys out of a total of 24 nominations.<sup>7</sup>

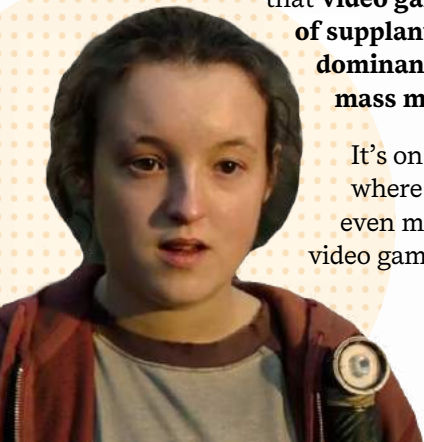
6. Keza Macdonald, "Are video game movies about to take over from Marvel?" *The Guardian*, November 8th, 2023  
 7. Victoria Kennedy, "HBO's *The Last of Us* wins eight Emmys, including outstanding guest actor for Nick Offerman's Bill," *Eurogamer*, January 8th, 2024



think that movie and TV adaptations of games are better now than they used to be.

So, what explains this sudden and dramatic shift in the fortunes of video game adaptations? Partly, it may be a product of the fact that Hollywood has learned, through trial and error, what works and what doesn't when it comes to adapting these franchises. **A majority of gamers and non-gamers alike agree that the average quality of movie and TV adaptations of video games has increased in recent years.**

And as is so often the case in the entertainment industry, a small number of successful releases are capable of creating a powerful snowball effect. Once high-quality video game adaptations started to find an audience and challenge conventional wisdom about the commercial viability of the genre, that gave studios and networks permission to make further investment in the space. In other words, we're seeing the emergence of a virtuous cycle that is allowing video game movies and TV shows to have their moment in the sun—not dissimilar from the trends that drove the wave of superhero movies in the 2010s or disaster movies in the late 90s and early 2000s.



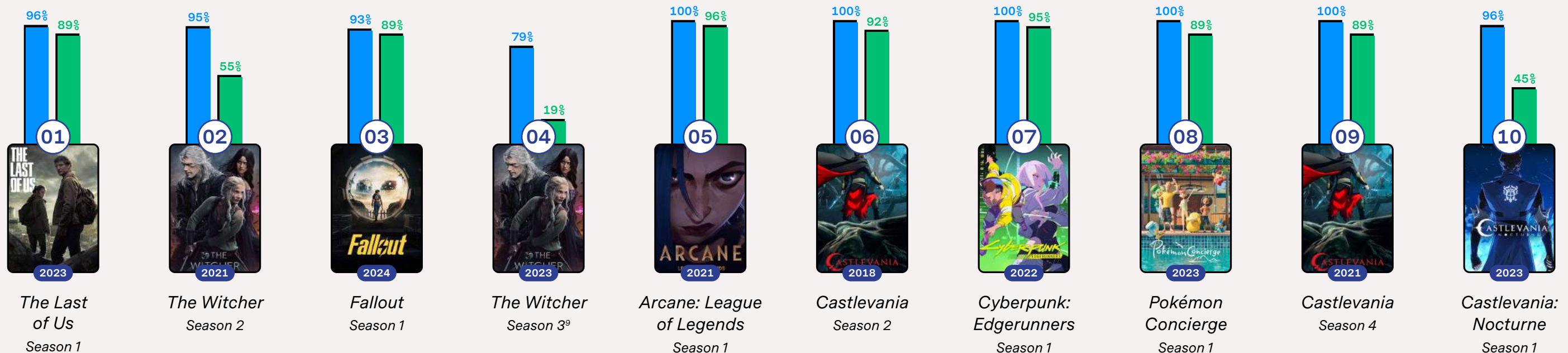
Ellie, *The Last of Us*, HBO



Joel, *The Last of Us*, HBO

RT ROTTEN TOMATOES' TOP 10 TV SERIES ADAPTED FROM VIDEO GAMES<sup>8</sup>

● Critics' Score 🍅 ● Audience Score 🍿



9. Subject of a review bombing campaign in response to Henry Cavill's departure from the show; Kate Harrold, "*The Witcher* season 3 is already being review bombed," *GAMINGbible*, May 5th, 2023



It's also likely, however, that this change reflects the evolving societal role of the video game industry itself. Gaming, today, is much more than a subculture; it's a true cultural and economic behemoth. **In the United States, the video game market is larger than music, book publishing, and sports combined.**<sup>10</sup> And around two-thirds of Americans now play video games on at least a weekly basis—even if only a small fraction of them would self-identify as “gamers.”<sup>11</sup>

And as the industry has expanded and matured, our cultural gatekeepers have been forced to reevaluate their opinions of it. The late, great Roger Ebert infamously argued that video games could never be “true art” on a par with novels, poetry, music, or movies.<sup>12</sup> Today's critics, however, tend to have more respect for the medium—in part, because developers and studios have proven their ability to use it to tell emotionally resonant stories and create new forms of interactive narratives. That newfound level of critical respect has helped to shake off some of the stigma once associated with “video game movies,” making them a safer investment for studios.

But perhaps most important of all are the generational factors at play. Millennials who grew up in the 90s and early 2000s—after the advent of home consoles and during the heyday of classic gaming franchises from the likes of Sega and Nintendo—are now in their thirties and early forties. Many of them have a deep emotional connection to these golden era titles. And while they may not have as much time for gaming as they did in their youth, movies and TV shows provide the perfect vehicle for a quick hit of nostalgia.

Some even have kids of their own who are now discovering those same classic franchises for themselves. This may have been one of the reasons that *The Super Mario Bros. Movie* managed to smash box office records last year: it successfully tapped into the deep well of nostalgia that elder millennials have for the characters and their universe, while still feeling current and relevant to kids and teens growing up with the latest generation of Mario titles.<sup>13</sup>

10. German Lopez, “Big Business Gets Bigger,” *The New York Times*, July 21st, 2023  
 11. “Video Games Remain America's Favorite Pastime With More Than 212 Million Americans Playing Regularly,” Entertainment Software Association, July 10th, 2023  
 12. Roger Ebert, “Video games can never be art,” *RogerEbert.com*, April 16th, 2010  
 13. Angel Shaw, “I've Watched The Super Mario Bros. Movie 5 Times Since It Came To Netflix,” *ScreenRant*, December 7th, 2023

# Despite recent success stories, movies and shows based on games are still a hard sell for non-gamers

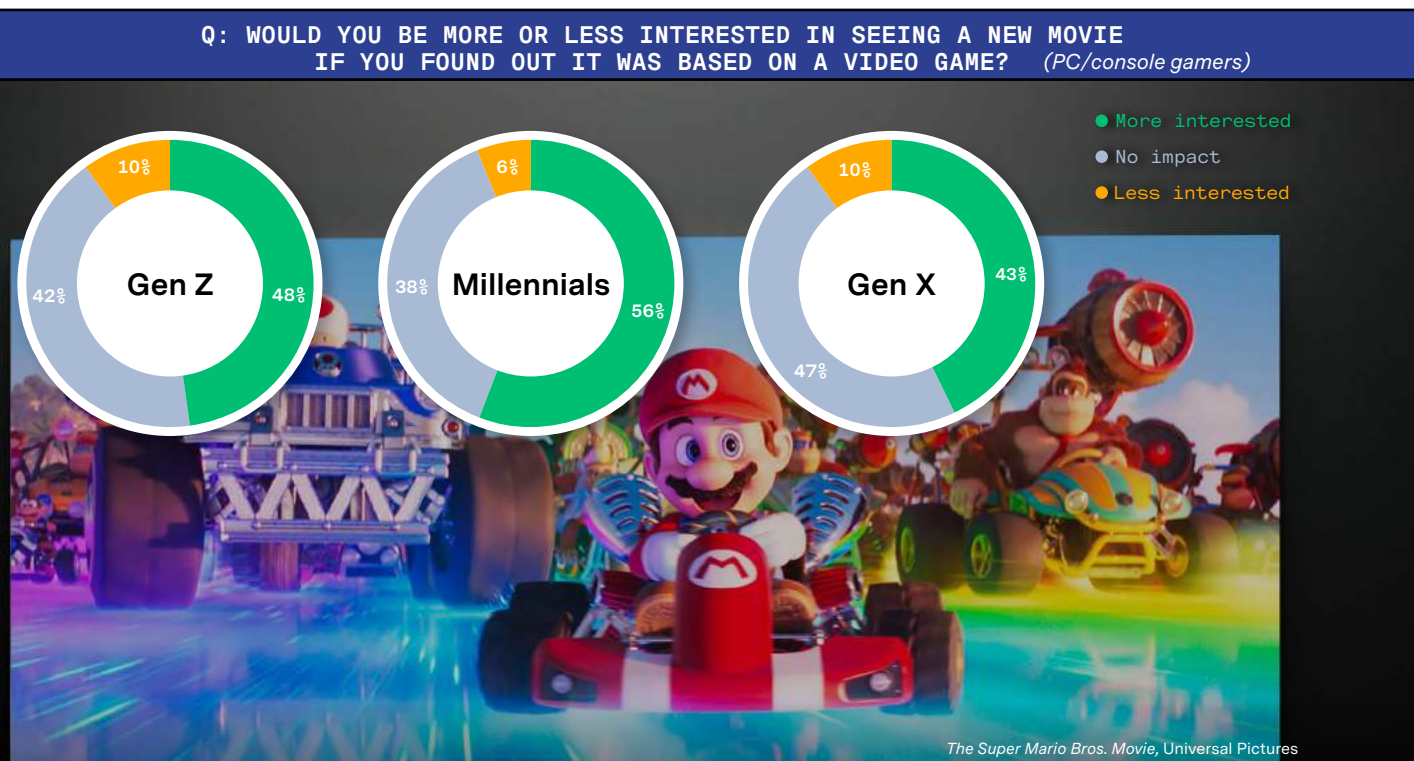
It would be a mistake, however, to assume that the recent wave of high-profile video game adaptations means that such titles do not still face challenges when it comes to breaking into the mainstream and reaching a mass market audience.

Unfortunately, the long track record of low-quality video game movies has left general audiences with some lingering negative perceptions about the genre. Among US consumers who aren't regular gamers, finding out that a new movie is based on a video game can often act as a signal that the title is unlikely to be for them.

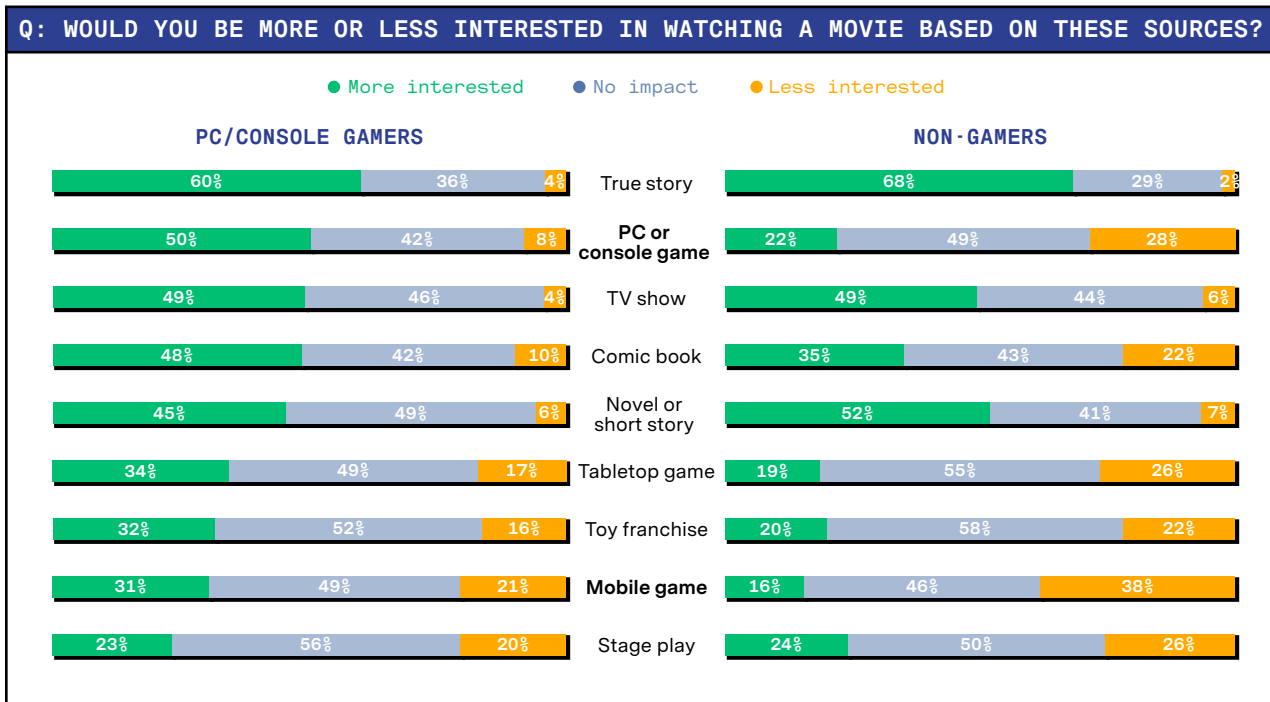
Twenty-eight percent of consumers who don't play video games say that they would be less interested in watching a movie that was based on a PC or console game—whereas only 22% would be more inclined to watch. Movies based on mobile games are an even tougher sell; almost four in ten non-gamers say that they would be disinclined to watch a movie after finding out that it was adapted from a mobile gaming property. Women, high-earners, and consumers over the age of 45 are particularly likely to show an aversion to movies adapted from gaming franchises.

Of course, not every movie or TV show has to appeal to non-gamers to be counted a success. *Five Nights At Freddy's*, for example, managed to gross almost \$300 million—around 15 times its budget—almost exclusively off the back of the franchise's legion of Gen Z superfans; a reported 80% of the movie's audience was made up of viewers under the age of 25.<sup>14</sup>

14. Lindsey Bahr, “‘Five Nights at Freddy's’ movie pulls off a Halloween surprise: \$130.6 million worldwide,” *USA Today*, October 29th, 2023







But this data does suggest that **movies and TV shows based on video games have a steep hill to climb if they want to cut through to non-gamers** and expand the audiences of their franchises. It's clear from the success of shows such as *The Last of Us* and *Fallout* that video game adaptations can achieve crossover success—but the bar for quality is exceptionally high. And it's likely that, for some demographics at least, these recent adaptations have been able to succeed in spite of, rather than because of, their source material.

The challenge, therefore, for studios, networks, and streaming services adapting video game franchises to film and television is to do so in a way that can make these properties more accessible to non-gaming audiences, while simultaneously meeting the expectations of existing fans. This challenge extends not only to the production of such adaptations, but also to their marketing.

15. Sophie Caraan, "HBO Announces 'The Last of Us' Podcast with Troy Baker, Craig Mazin and Neil Druckmann," Hypebeast, January 10th, 2023

Lucy, *Fallout* (TV Series), Amazon Prime Video

In many cases, broadcasters and distributors have felt the need to run, effectively, two parallel marketing campaigns. *The Last of Us* is an archetypal example of this phenomenon. While many of the show's trailers avoided drawing attention to its gaming heritage, HBO also invested in targeted outreach to existing fans of the video game series—including the production of a behind-the-scenes podcast hosted by Troy Baker, one of the key voice actors from the games.<sup>15</sup>

In some cases, the marketing for movies based on gaming franchises seems to be actively fighting against them being perceived as video game adaptations. The trailers and posters for 2023's *Gran Turismo*, for example, heavily emphasized the fact that the movie was based on the true story of racing driver Jann Mardenborough, rather than positioning it as a direct adaptation of the gaming franchise it shares its name with.<sup>16</sup>

16. Marco Vito Oddo, "Yes, There Really Is a True Story Behind 'Gran Turismo,'" Collider, March 22nd, 2024



Vault Boy, *Fallout* (Video Game), Bethesda

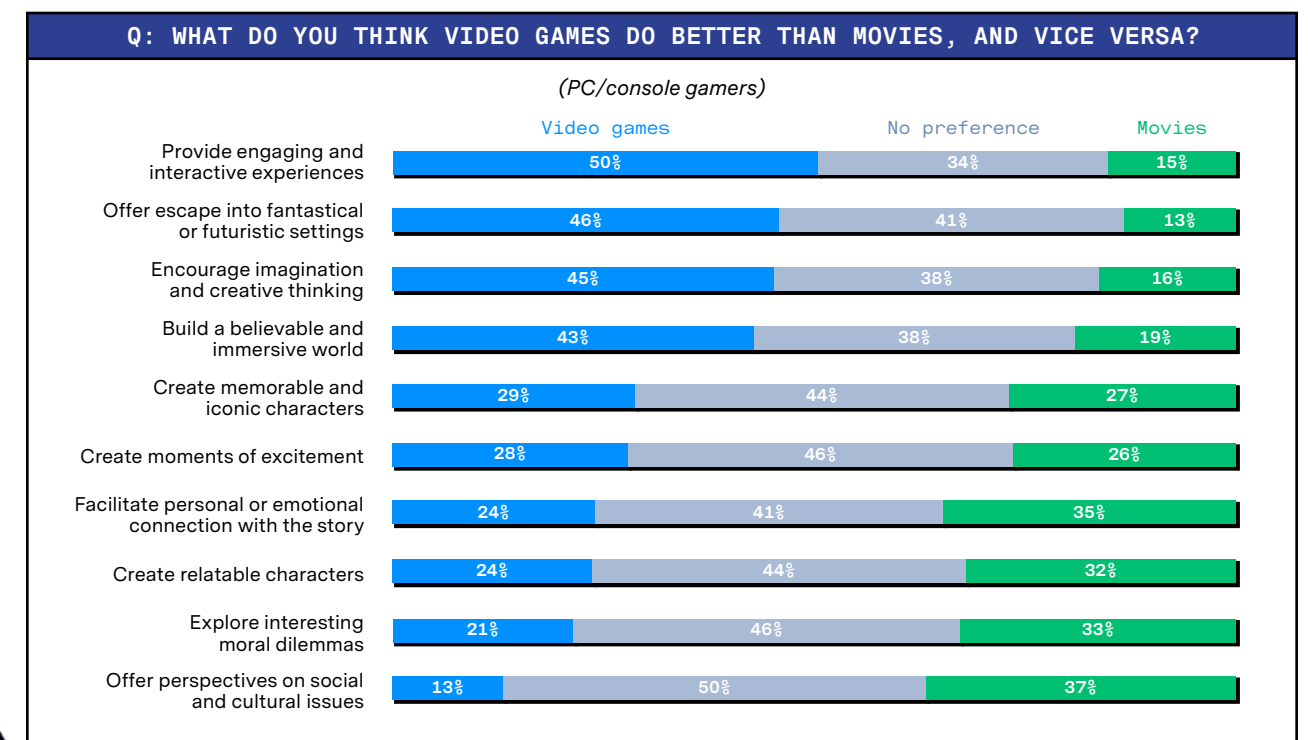
# To succeed, video game adaptations need to lean into the unique advantages of their source material

To solve these twin challenges of appealing to existing fans while simultaneously making gaming properties accessible to a wider audience, it's critical that those adapting video game franchises into film and TV titles do so with an awareness of the unique benefits and challenges of this kind of source material.

Predictably, gamers value the unique degree of interactivity offered by the medium, compared to "lean back" forms of entertainment. But they also see video games as a form of storytelling that offers a uniquely immersive experience—one that provides the opportunity to escape into vividly realized fantasy worlds and explore the nooks and crannies of fictional universes.

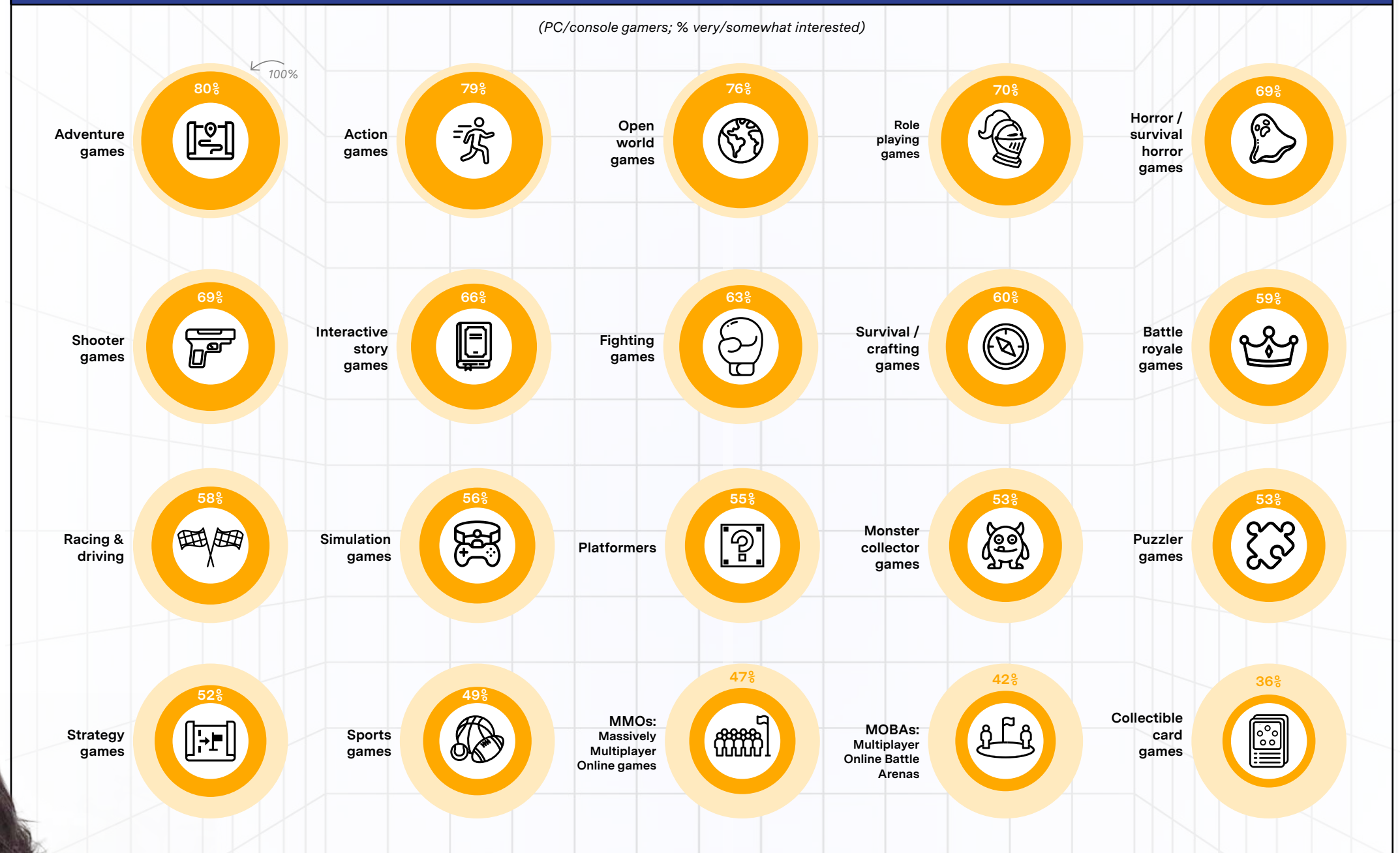
By the same token, the **titles that gamers see as the best source material for adaptations tend to be those in which the relationship between the player and the environment is central to the gaming experience.** Open world titles, RPGs, and survival horror games, for example, tend to be seen by gamers as properties that are particularly well-suited to the process of adaptation.

Studios adapting these titles, therefore, need to appreciate the fact that this level of immersion is a core part of what draws gamers to these titles—and that this creates an expectation which fans of the original game will expect any adaptation to deliver on.



Q: HOW INTERESTED WOULD YOU BE IN WATCHING ADAPTATIONS BASED ON THESE TYPES OF GAMES?

(PC/console gamers; % very/somewhat interested)



Of course, immersion is harder to pull off in a medium where the viewer doesn't have the option to wander off the beaten path and explore their surroundings. But there are narrative techniques that movies and TV shows can employ to convey the idea that they take place within a more fully realized world, and that what we're seeing on screen represents only a small sliver of a larger universe. For example, small visual Easter eggs can serve to remind committed fans of the deeper lore and backstory of the original game, without compromising the viewing experience for non-gamers.

Conversely, gamers acknowledge the fact that video games tend to be a less effective tool than movies when it comes to building empathy with characters, generating emotional and narrative complexity, or offering a timely perspective on important social and cultural issues. And this is understandable: first-person games, after all, don't need to invest as much time in building an emotional connection with the protagonist when the player literally experiences the story from their perspective.



Frank and Bill, *The Last of Us*, HBO

These, therefore, are the areas where movies and TV shows have the most leeway to make adaptational changes to the source material. Strong adaptations understand this: *The Last of Us*, for example, did a great deal to flesh out the backstories of characters from the original games, creating more opportunities for viewers to become emotionally

invested in their storylines. Most notably, in the third episode of the series, the show ventured beyond the confines of its genre to tell a love story only hinted at in the original game, introducing a new layer of narrative complexity and an emotional arc not present in the source material.<sup>17</sup>

17. Andy Welch, "The Last of Us recap episode three - absolutely magical television," *The Guardian*, January 30th, 2023



# Respecting the original game is vital—but this doesn't have to mean uncritical devotion to the story

59%

of gamers say they feel emotionally betrayed when a game they love is adapted by people who don't respect the source material.

Ultimately, the adaptations that succeed at bridging the gamer/non-gamer divide tend to be those that lean into the expectations of core audiences, while simultaneously being willing to build on or even make changes to the source material where necessary to address the in-built limitations of games as a storytelling vehicle.

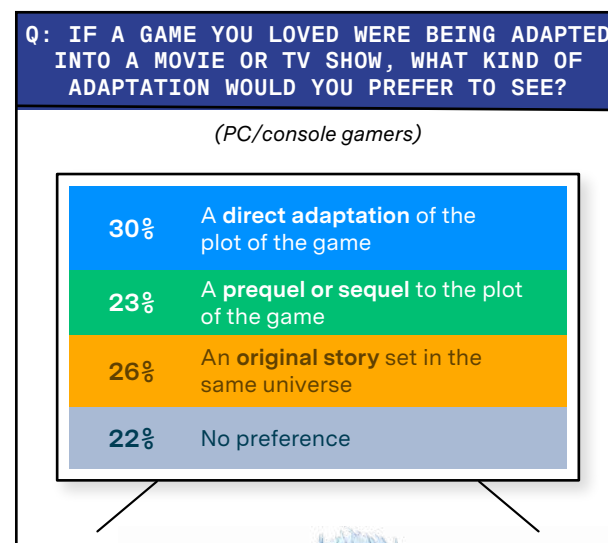
Adaptational changes can be a touchy subject when it comes to movies and shows based on video games. It would be easy to assume that any significant deviations from the source material risk provoking the ire of invested fans—as demonstrated by the intense backlash to the title character's original design when the first trailers for 2020's *Sonic the Hedgehog* were released.<sup>18</sup>

The reality, however, is that **most gamers understand that changes to the source material are often a necessary part of the adaptational process.** Certainly, gamers want to see the franchises they love treated with care and respect: three quarters say that it's important to them that adaptations are written and directed by creators who have played and have a genuine respect for the original games, and a majority report that they feel "emotionally betrayed" when they watch an adaptation that clearly doesn't respect its source material.

<sup>18</sup> Bryan Alexander, "How 'Sonic the Hedgehog' avoided death by Twitter with a dramatic, game-saving redesign," USA Today, February 13th, 2020

77%

of gamers say it's important to them that the writer and director of an adaptation have a genuine love for the source material.

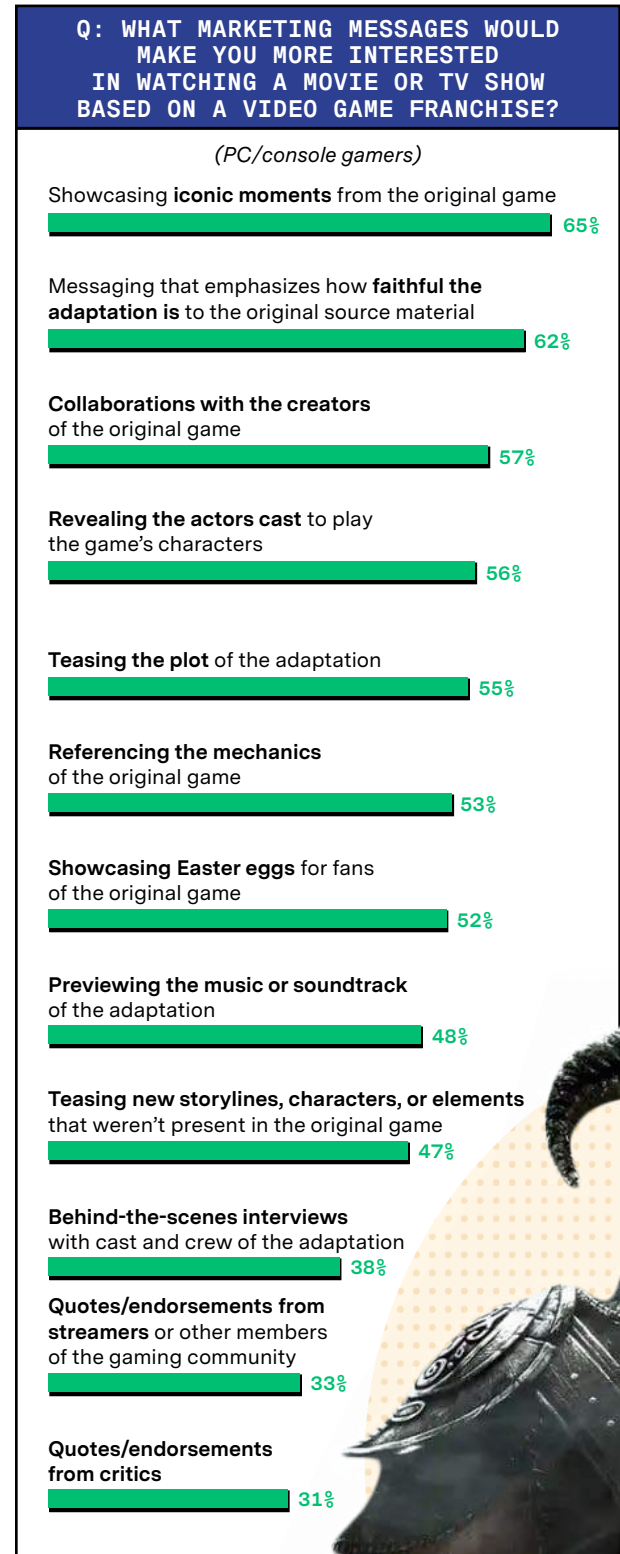


But this notion of respect and care for the source material doesn't have to imply a commitment to recreating the plot of the original game beat for beat. In fact, only 30% of gamers say that, if one of their favorite games were being adapted for screen, they'd want the creators to directly adapt the original game's plot. Forty-nine percent, on the other hand, say that they'd rather watch an adaptation that acted as either a prequel or sequel to the original game, or one that chose to focus on an entirely new story set in the same universe. Gamers, in other words, aren't just open to being shown something they haven't seen before: many of them are actively looking for that sense of novelty and surprise in the adaptations they consume.

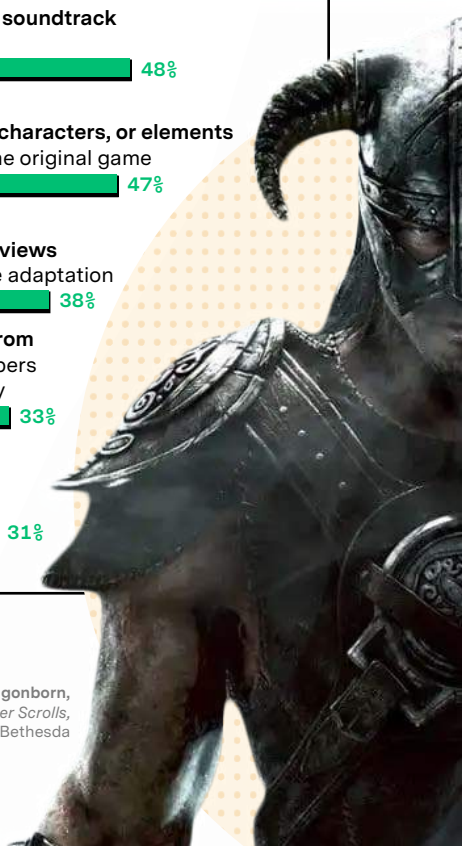
Narratives, after all, are only one of many factors that can induce someone to fall in love with a game or gaming franchise. Many players care less about the plot of their favorite games than they do about their universes and their lore, their tone and style of humor, or their distinctive aesthetic sensibilities. By paying respect to these critical elements, writers and directors can earn themselves enough goodwill among invested fans to get away with making substantial changes elsewhere.

By extension, gamers say that the **kinds of marketing techniques that are likely to get them excited for an upcoming movie or video game adaptation of a beloved gaming franchise are those that pay homage to the original games.** Scenes in a trailer that recreate or allude to iconic moments from the games, for example, or collaborations with the game's original creators or voice actors can go a long way towards convincing fans that the properties they love are in safe hands.

It's important to note, however, that this notion of faithfulness to the source material can mean different things depending on the context. For story-driven games with complex plots like *The Last of Us*, players are naturally going to expect a degree of narrative continuity. Conversely, for open-world games like those in the *Fallout* or *Elder Scrolls* series—where the setting is typically a bigger draw than the characters or plot—fans will likely be more open to entirely new narratives, provided that it feels as if they're taking place in the universes they know and love.



Last Dragonborn, The Elder Scrolls, Bethesda





CASE STUDY

# The Last of Us

The Last of Us, HBO

*The Last of Us* is a prime example of a recent adaptation that managed to walk the fine line between satisfying the expectations of existing fans and making the franchise accessible to a mass market audience.

## Reaching New Audiences

### Relying on established genre conventions

The show benefited from audience familiarity with the zombie apocalypse genre; even if they hadn't played the games, viewers were likely familiar with its core tropes thanks to their exposure to films and series like *The Walking Dead*. From this baseline of familiarity, the show was able to introduce new ideas and concepts, maintaining a balance between accessibility and novelty.

### Connecting to real-world social themes

In a subtle change to the source material, the show introduced the idea that the zombie plague in the show was an indirect result of climate change. Other narrative changes reinforced the idea of the show as a metaphor for real-world environmental disasters, helping the series to feel topical and of-the-moment.<sup>19</sup>

### Emphasizing character over action

Despite the inherently gruesome nature of its subject matter, the show used violence and gore sparingly—with some episodes barely featuring zombies at all. Instead, it focused on the character-driven moments that functioned as the emotional core of the original game, expanding on character's back stories and introducing new sub-plots to create moments of empathy.



Ellie, *The Last of Us*, HBO

## Leaving Easter eggs for gamers

The show is replete with callbacks to the mechanics of the original games for eagle-eyed viewers. In one episode, we briefly see a "bloater," one of the game's most memorable enemies; in another, we hear several songs that were an important part of the original soundtrack.<sup>20</sup>

## Collaborating with the game's creators

Neil Druckmann, the co-creator of the original game, was heavily involved in every stage of the show's production—helping to provide a sense of continuity between the source material and its adaptation. And he isn't the only figure from the game to be involved with the show; the original voice actors for Joel and Ellie, the two main characters, both make cameo appearances towards the end of the first season.

## Communicating directly to fans

During the marketing cycle for the series, HBO made a concerted effort to engage online gaming communities and franchise superfans. This included the production of a behind-the-scenes podcast, in which the showrunners discussed the rationale behind important adaptational changes, as well as immersive pre-release screenings for gaming influencers.<sup>21</sup>



Joel, *The Last of Us*, HBO

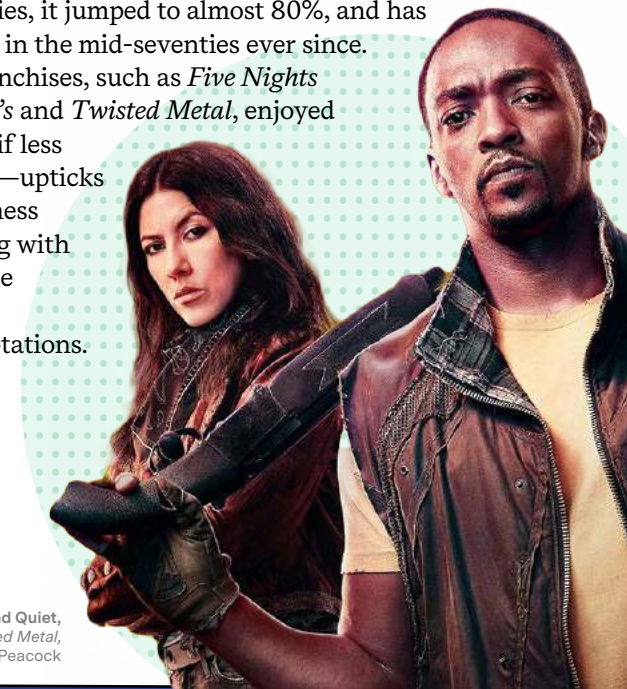
## Satisfying Existing Fans

# Successful adaptations can play a key role in securing the long-term health of franchises

Drawing in an audience of TV viewers or moviegoers, however, is only one of many success criteria for video game adaptations. For game studios, the responses of audiences and critics to adaptations of their franchises are often less important than the ability of those adaptations to keep their franchises at the forefront of public consciousness in-between new releases, and to help contribute to long-term player acquisition and retention.

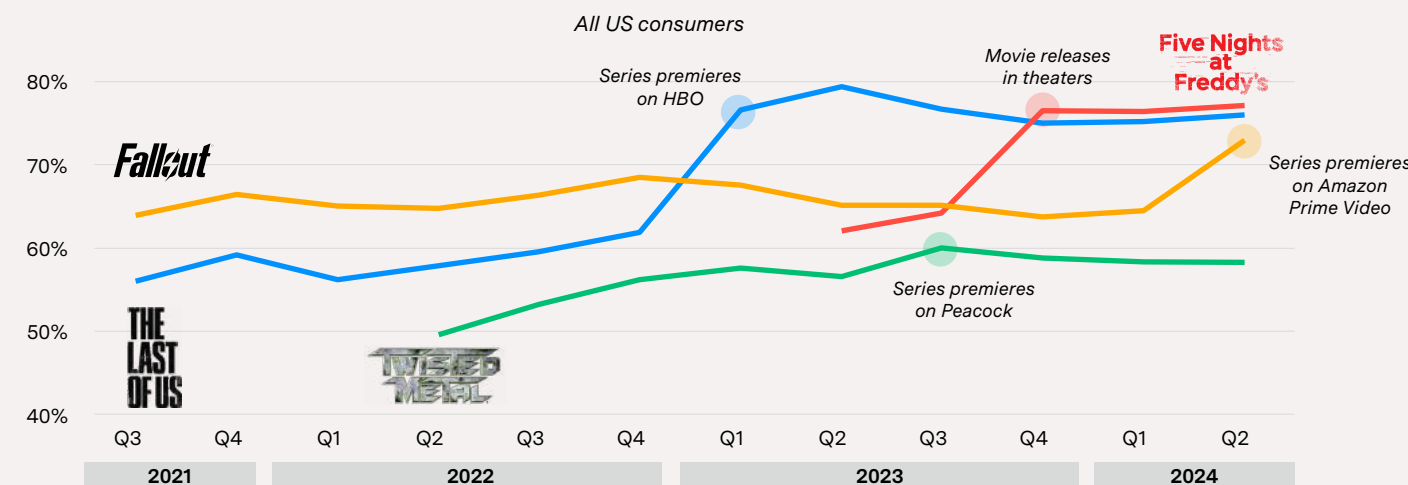
Certainly, there is strong evidence to suggest that high-profile movie or TV adaptations of gaming franchises can do a lot to broaden the reach of those franchises and introduce them to new audiences. For household names like *Mario* and *Sonic*—both franchises familiar to over 90% of Americans—this effect is hard to notice. But for titles in that next band of awareness, the impact is considerably more noticeable.

Before HBO began marketing their adaptation, awareness for *The Last of Us* consistently hovered in the mid- to high-fifties; following the release of the series, it jumped to almost 80%, and has remained in the mid-seventies ever since. Other franchises, such as *Five Nights at Freddy's* and *Twisted Metal*, enjoyed similar—if less dramatic—upticks in awareness coinciding with the release of their own adaptations.



John Doe and Quiet, *Twisted Metal*, Peacock

## AWARENESS FOR KEY GAMING FRANCHISES



19. Troy Farah, "The Last of Us" is an almost-perfect metaphor for climate change, but it gets one thing wrong," Salon, January 19th, 2023

20. Josh Wigler, "The Last of Us Season 1: All the Easter Eggs You May Have Missed," Vanity Fair, March 12th, 2023

21. Kaylee Hultgren, "HBO's In-World Immersion For 'The Last of Us' Wows Superfans," Event Marketer, January 30th, 2023

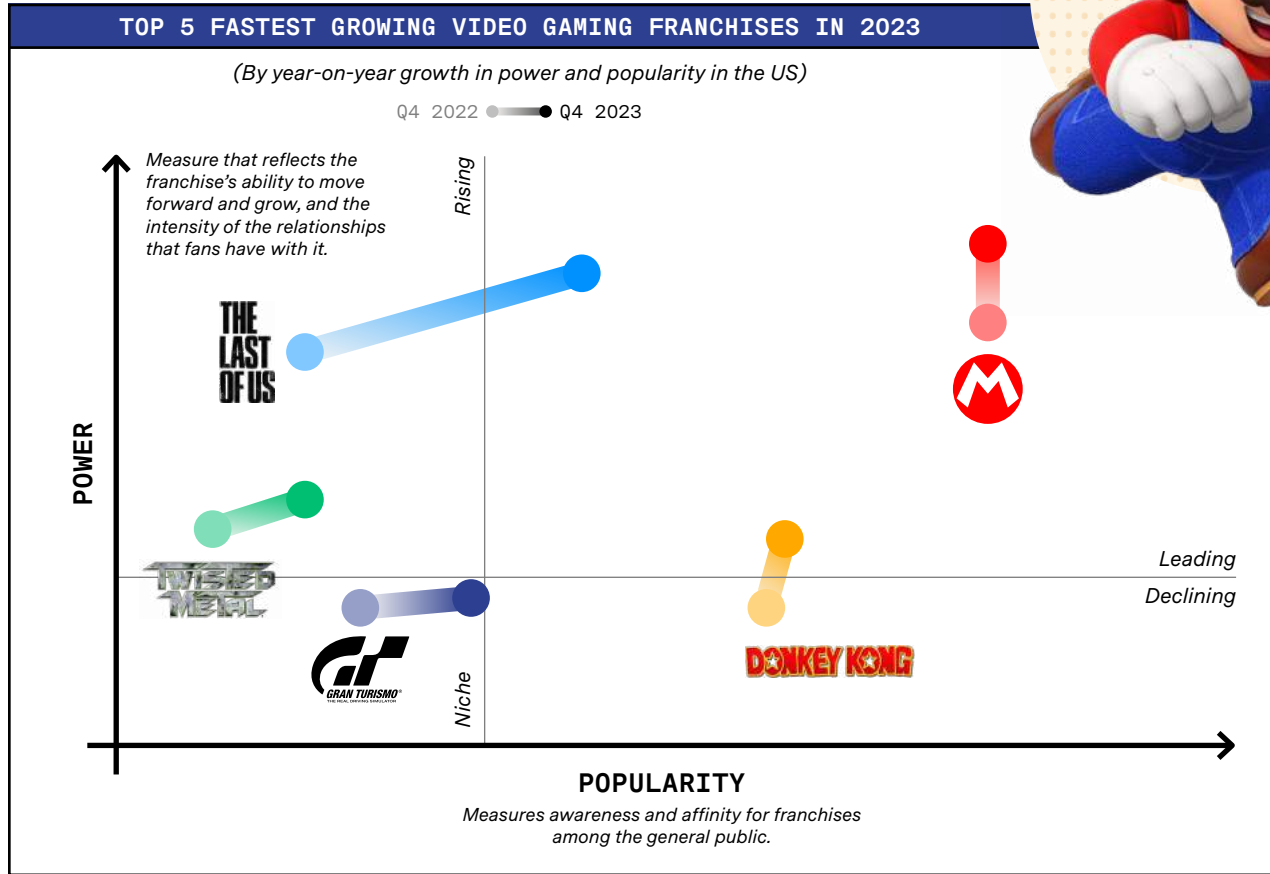




Mario, Nintendo



Grand Theft Auto, Rockstar North



NRG's Franchise IQ is an industry-leading tracking product that measures the health of entertainment franchises across TV, movies, gaming, and more; each week, we survey 3,000 consumers in the US, measuring their relationship to nearly 900 different franchises. This tool provides a wealth of data

through which we can measure the holistic impact of video game adaptations on their franchises.



Donkey Kong, Nintendo

And this data indicates that **adaptations can do a lot to help build momentum behind video game franchises**. In fact, of the five gaming franchises that saw the biggest gains in overall franchise health in 2023, four of them were the subject of movie or TV adaptations—and the fifth, *Donkey Kong*, was prominently featured in the adaptation of another franchise.

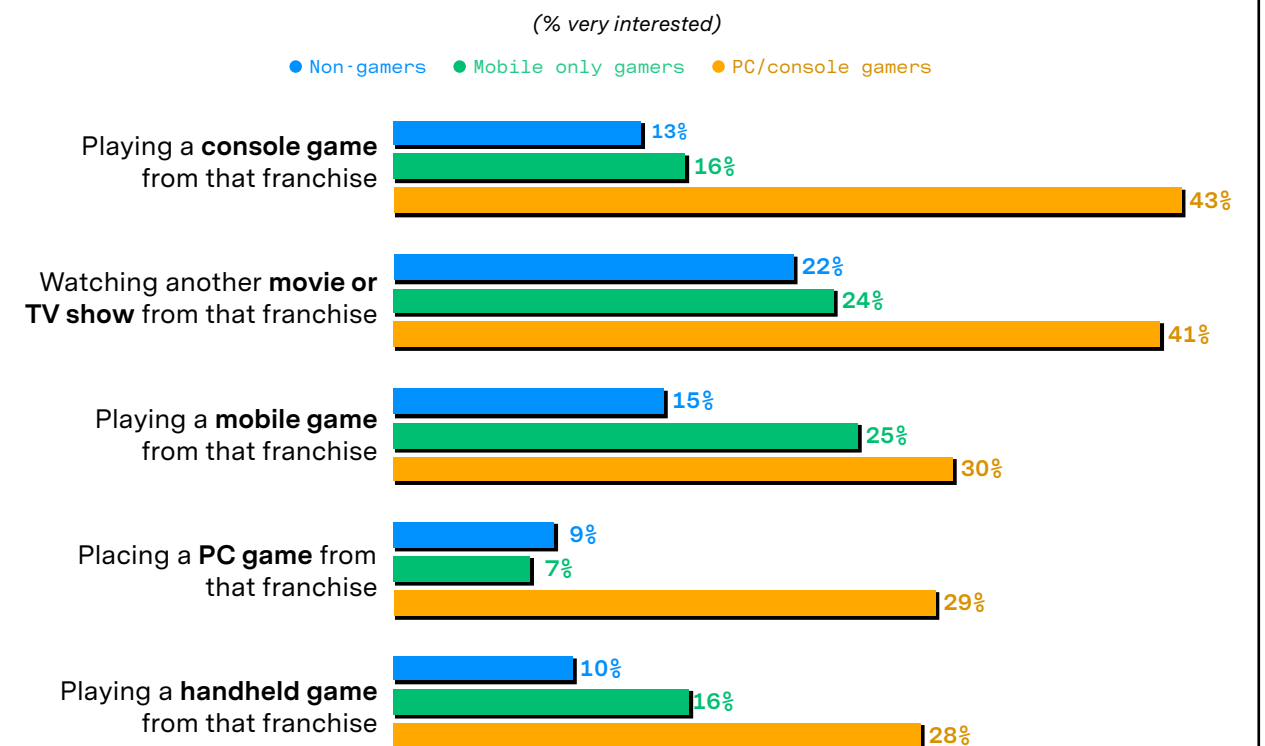
These franchises saw marked gains not only in popularity, but also in power—indicating that their adaptations helped to deepen their relationships with existing fans, and increase public appetite for further engagement with the franchise across a wide variety of different touch points.

## By turning existing fans into evangelists, adaptations can drive long-term user acquisition

So it's clear that adaptations of video games can help to reinforce the overall health of those franchises. The question, however, of whether those adaptations can lead to a direct expansion of the player base for games within those franchises is a more complex one.

In theory, many consumers say that they're open to the idea of watching a movie or TV show and then seeking out the game it was based on. Forty-three percent of regular PC/console gamers—and even 13% of non-gamers—say that they would be "very interested" in playing a console game after watching and enjoying a movie or TV adaptation.

Q: IMAGINE THAT YOU'D JUST WATCHED AND ENJOYED A MOVIE OR TV SHOW BASED ON A VIDEO GAME FRANCHISE. HOW INTERESTED WOULD YOU BE IN CONTINUING TO ENGAGE WITH THE FRANCHISE IN EACH OF THESE WAYS?

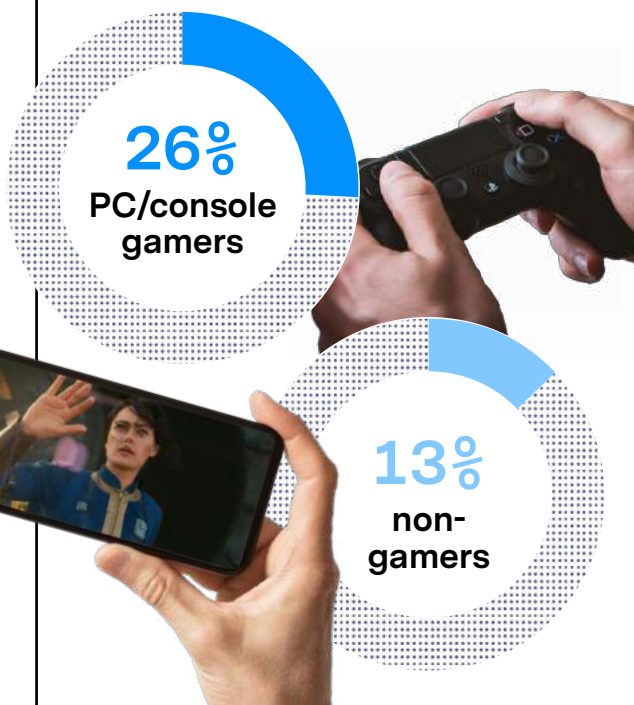




In practice, however, it's harder to find concrete evidence of a direct pipeline here. Only about a quarter of regular gamers say that they've ever picked up a new video game specifically because they watched an adaptation of it. Among players who have been tempted to try a new game after watching a TV show or movie, the most commonly cited examples were *The Last of Us*, *Halo*, and *The Witcher*.

Broadening the player base for PC and console games is a notoriously difficult challenge, and so even incremental gains such as these can go a long way to ensuring the long-term profitability of gaming franchises. But still, it's clear that there's a big gap between the self-reported willingness of TV and movie audiences to seek out gaming franchises, and their actual propensity to do so.

Q: HAVE YOU EVER PLAYED A VIDEO GAME BECAUSE YOU WERE INTRODUCED TO THE FRANCHISE BY A MOVIE OR TV SHOW?



That said, while adaptations may not always succeed at directly converting viewers into gamers, **there is strong evidence to suggest that they can deepen and intensify a franchise's relationships with its existing fans**—and, by extension, turn those fans into a marketing channel.

Two-thirds of gamers say that adaptations of their favorite games make it easier for them to share their love of those franchises with friends and family. By making these stories more accessible, adaptations can create new opportunities for existing fans to pass on their passions to others. Someone who's watched *The Last of Us*, for example, might choose to recommend the TV series to colleagues who they know don't own a gaming console; a dedicated *Fallout* fan will probably have more luck introducing their kids or spouse to the franchise if they've already watched and enjoyed the adaptation.

Adaptations, therefore, can play a major role in converting isolated fans into active and committed franchise evangelists. In other words, adaptations do have a vital role to play in expanding the potential player-base for video games—but the mechanism through which they achieve this is more complex than viewers simply watching a movie or TV show and then downloading a new game. Instead, adaptations need to be viewed as a long-term investment in building and strengthening communities: a crucial link in a lengthy chain which, over time, helps bring in new players and create new fans.

**65%**  
of gamers say that adaptations make it easier for them to share their love of gaming franchises with others.

# As nostalgia cycles continue to shorten, adaptations will be a powerful tool for reactivating lapsed fans

**72%**  
of gamers say that watching an adaptation of a game they've played before will often inspire them to go back and play the game again.

As well as making it easier for players to share their love of their favorite games with others, a successful adaptation can also inspire fans to revisit and reconnect with franchises that matter greatly to them, but which they haven't interacted with in a long time. Seven in ten gamers, for example, say that watching a movie or a TV show based on a video game will encourage them to go back and play the original game.

In this respect, the current wave of video game adaptations is inextricably bound up with a much larger cultural phenomenon: the increased potency of nostalgia as a driver of entertainment consumption. Across the media and entertainment industry, creatives are tapping

**80%**  
of gamers believe that a good adaptation can revive interest in older games or franchises that have dropped in popularity.

into nostalgia like never before—rebooting and revisiting beloved franchises from decades past at breakneck speeds.<sup>22</sup>

At the same time, nostalgia cycles are becoming shorter. On platforms like TikTok and Instagram, Gen Z-ers spend much of the time—both ironically and sincerely—celebrating the brands, products, and franchises that defined their relatively recent childhoods. The “Gentleminions” trend, which helped propel *Minions: The Rise of Gru* to become one of the most successful movies of 2022, is just one example of how nostalgia can be both an organizing tool for online communities, and an instigator of real-world action.<sup>23</sup>

22. David B. Feldman, “Why Nostalgia is on the Rise,” Santa Clara University, January 7th, 2022  
23. Kalhan Rosenblatt, “The teen behind the ‘Gentleminions’ trend says the viral video was inspired by childhood nostalgia,” NBC News, July 7th, 2022



Minions; Minions: The Rise of Gru, Universal Pictures



So too with video games: adaptations that tap into that sense of nostalgia can rekindle fans' connections with a franchise, prompting them to revisit the universes in which they spent so much of their childhood or young adult years. This can be true even for franchises such as *Minecraft* and *Five Nights at Freddy's* whose player bases skew towards the younger end of the spectrum.

This is also a big part of the reason that the franchises which players say they would be most excited to see turned into movies or TV shows tend to be true classics that have stood the time—rather than buzzy contemporary titles that have racked up Game of the Year awards.



Zelda, Nintendo

24. Respondents were asked to name the gaming franchise which hasn't yet been adapted into a movie or TV show that they would be most interested in watching an adaptation of. Franchises that have already received an adaptation were filtered out of responses.



Call of Duty, Activision

TOP 10 FRANCHISES GAMERS WOULD LIKE TO SEE ADAPTED INTO MOVIES/TV SHOWS<sup>24</sup>

- 01 THE LEGEND OF ZELDA
- 02 CALL OF DUTY
- 03 GRAND THEFT AUTO
- 04 FORTNITE
- 05 RED DEAD REDEMPTION
- 06 THE SIMS
- 07 MINECRAFT
- 08 GOD OF WAR
- 09 MASS EFFECT
- 10 GEARS OF WAR



Fallout, Amazon Prime Video

CASE STUDY

# Fallout

The recent *Fallout* series on Amazon Prime Video serves to illustrate how an adaptation can inject new vitality into a franchise's player base—even one that hasn't seen a new main series release since 2018.

On release, the show was praised by critics, both as a standalone piece of storytelling, and for its faithfulness to the tone and themes of the original games.<sup>25</sup> The positive reception of the series saw games from the franchise surge up the Steam charts, with many of them tripling the size of their player bases during the month of its release. While we don't yet know exactly what percentage of this growth came from new players introduced to the games by the series versus established fans revisiting them, it's clear that the adaptation sparked a wave in interest and community activity around the franchise.

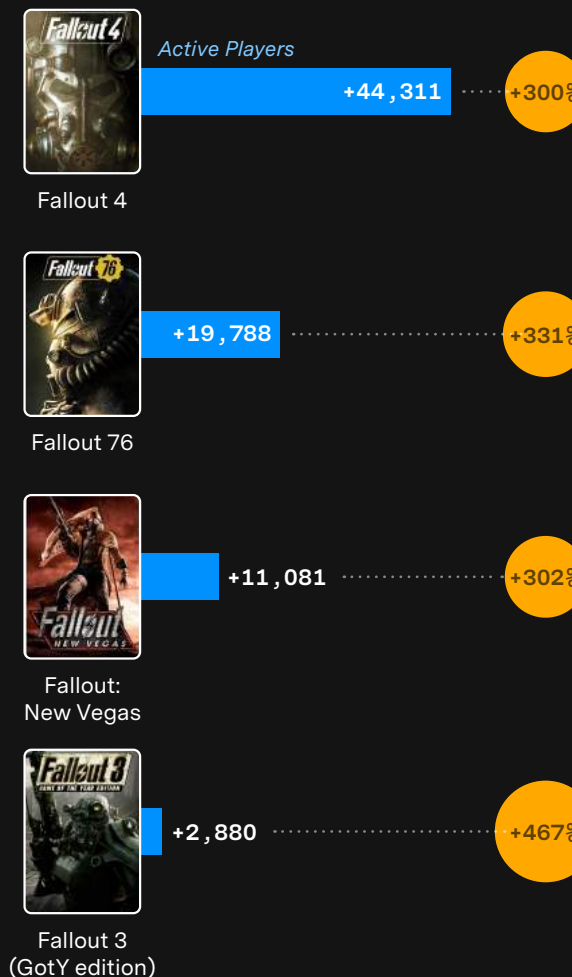
And Bethesda made a number of canny marketing moves to encourage this trend. By scheduling a major graphics and quality of life update for *Fallout 4* to coincide with the release of the series, they provided yet another reason for longtime players to log back in. At the same time, they made the classic games more accessible to new players by offering several of them in a bundle available for free to Amazon Prime Gaming subscribers.



Maximus, *Fallout*, Amazon Prime Video

CONCURRENT PLAYERS ON STEAM<sup>26</sup>

30-day gains during April 2024



25. Samuel Axon, "War never changes: A *Fallout* fan's spoiler-laden review of the new TV series," *Ars Technica*, April 20th, 2024

26. Data from [SteamCharts.com](https://steamcharts.com), accurate as of April 30th, 2024



# Right now, the future looks bright for gaming adaptations

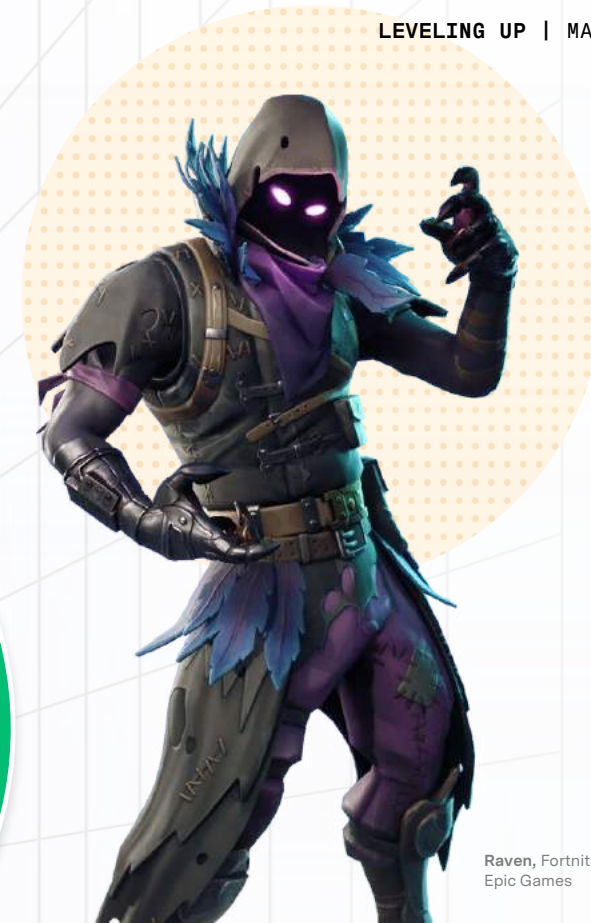
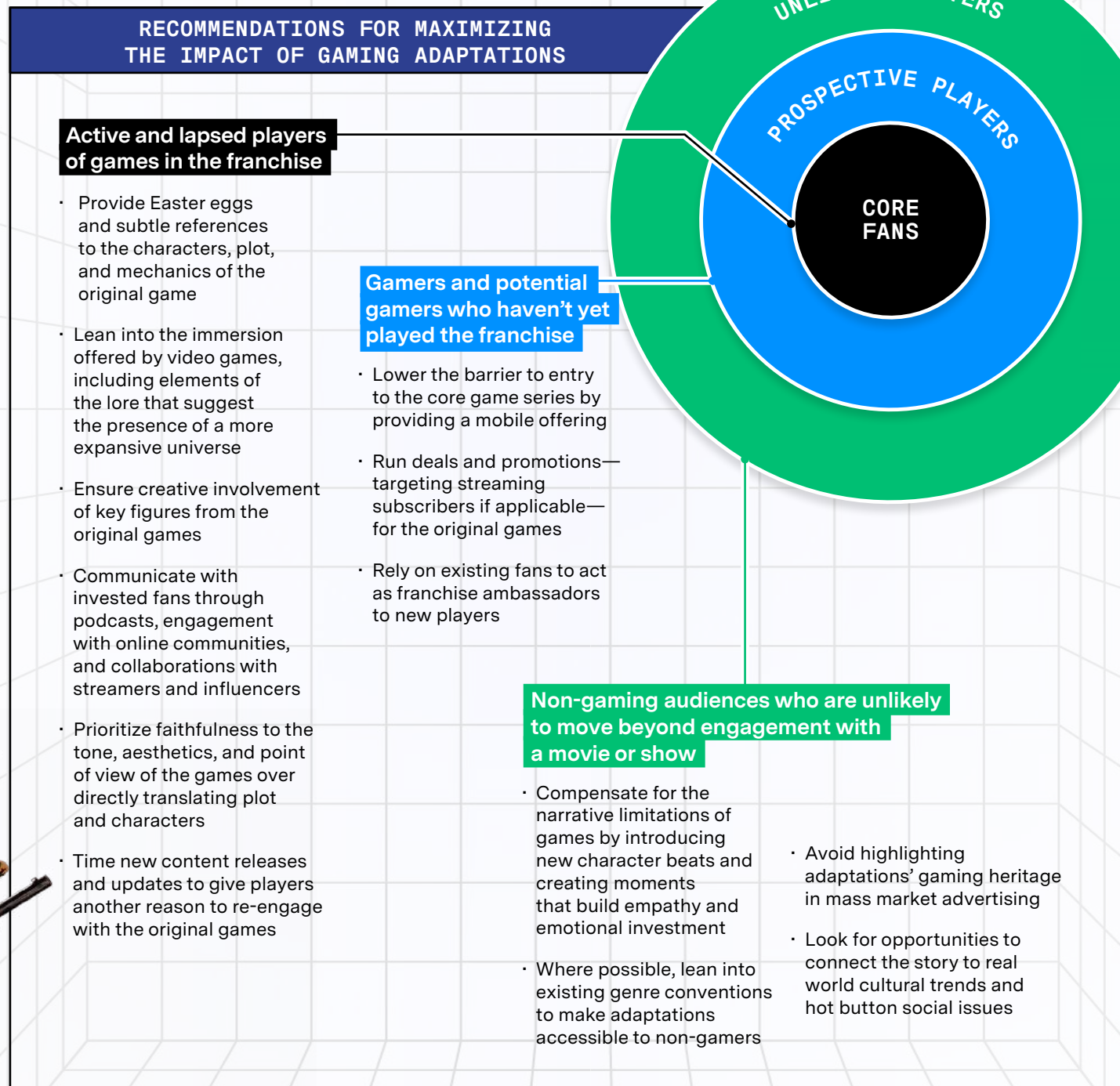
The recent success of adaptations like *The Last of Us*, *Fallout*, and *The Super Mario Bros. Movie* underscores a pivotal shift in the entertainment industry: no longer a byword for cheap cash grabs, video game adaptations have now proven their ability to win over both audiences and critics alike.

This is not merely due to the growing sophistication and emotional depth of video games as a medium, but also reflects a strategic evolution in how these adaptations are developed and presented. By focusing on character-driven narratives, leveraging the rich lore of their worlds, and integrating well-crafted Easter eggs and homages to the original games, creators are finding new ways to bridge the gap between dedicated fans and mass market audiences.

Moreover, these adaptations are proving to be a boon not just for streamers, TV networks, and movie studios, but for the video game industry as well. By rejuvenating interest in the original games and converting existing fans into franchise evangelists, adaptations can help to expand the cultural footprint of these franchises and secure their long-term commercial viability.



The Naturalist, Red Dead Redemption, Rockstar San Diego



Raven, Fortnite, Epic Games

And given how many projects are currently in development at major studios, it seems unlikely that this trend will abate any time soon. As investment into this space continues, it will be crucial for creators to maintain a balance between fidelity to the original source material and the creative changes necessary to support the process of adaptation. Ensuring accessibility to new audiences without diluting the essence of the game is a delicate task, but one that can yield significant rewards in terms of audience engagement and critical acclaim.

In 2024, gaming is far from a niche hobby. In a sense, the real question isn't why video games are now succeeding on TV and at the box office: it's why it took so long. But regardless, the newfound prominence of these adaptations is a testament to the maturing of video games—and video gamers—as a cultural and artistic force. It reflects an industry that is increasingly sophisticated in its storytelling and more ambitious in its reach, and opens the door to a broad array of new and exciting narrative possibilities.





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**WORDS & ANALYSIS**



Fergus Navaratnam-Blair



Jasmina Saleh



Collin Leirvik



Scott Galante



Justin Bernstein



Joshua Hack



Lucy Murrey



Grady Miller

**METHODOLOGY**

Unless otherwise specified, data in this report comes from a study of 1001 PC/console gamers and 501 consumers who don't regularly play PC/console games (including both non-gamers and mobile-only gamers). This study was conducted online in March 2024. All participants were based in the US and aged 13 to 54. Members of both audiences were weighted to reflect the demographics of gaming and non-gaming populations in the US, based on previous NRG research.

Data on long-term franchise trends (on pages 9 and 10) comes from Franchise IQ, an NRG research program that measures consumer attitudes towards almost 900 entertainment franchises in the US and close to 1,300 franchises globally. Data for this program is collected on a weekly basis by surveying 3,000 US consumers, ages 13 to 64, supplemented by additional surveys in other markets.

**franchise IQ**

**Franchise IQ** is a market-leading tracking product that measures consumer attitudes towards entertainment franchises—defined as IP with multiple consumer touchpoints across different forms of media or (planned) spin-offs, remakes, reboots, or prequels. This tracker operates in the US as well as ten key international markets, using over 50 unique metrics to capture a full picture of franchise health.

Leading entertainment brands rely on Franchise IQ to understand the comparative performance of their franchises, identify new storytelling opportunities, and inform big bets on blockbuster titles. To learn more about Franchise IQ, reach out to the team at [FranchiseIQ@nrgmr.com](mailto:FranchiseIQ@nrgmr.com)

**DESIGN & ILLUSTRATIONS**



Design by Olivia Reaney-Hall



Art Direction by Grace Stees

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