

JOIN THE GAMING IP GOLD RUSH



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There is a rumble of change in the gaming and media industries, and signs are pointing towards the potential for a new golden age of gaming IP.

Crossovers between gaming and video content are nothing new, but the successful release of *The Last of Us* (2023) and *Arcane: League of Legends* (2021) is paving the way for high-quality and culturally resonant adaptations. With more confirmed future adaptations of other popular gaming IPs like *God of War* and *Horizon* coming soon and a plethora of other content ripe for adaption¹, there is a huge opportunity for both the gaming and streaming industries to tap into new audiences and open up new revenue streams.

Games have been pulling inspiration from existing popular media and entertainment IP for decades². However, the rapid growth of the gaming industry in the past 10 years³ means games have become a more sophisticated

medium in their own right. Technological advancements and greater investment⁴ in the industry as a whole has enabled a more immersive gaming experience, with well-developed narratives that tell compelling stories, and professional voice acting, sound design and motion capture giving nuance and depth to performances. This tipping of the scales means that gaming IP can be leveraged in new and exciting ways, creating a virtuous cycle of increased recognition and engagement with IP across media.

This shift in the media landscape is worth paying attention to. For streaming services and broadcasters, there is potential to attract existing fans of the game, as well as those who have not played or heard of the game, to a platform. For gaming studios and publishers, there are opportunities to tap into ongoing success and longevity by diversifying and increasing engagement with their IP.

So, what can we learn from adaptations like *The Last of Us* and why is its success important for brands, studios and content creators?

The opportunities

Broadening and expanding audience engagement

Adaptations of games can provide crossover appeal for those familiar with the IP, and audiences looking to engage with fresh and culturally relevant content. Gaming studios and publishers benefit from greater exposure to their IPs, with *The Last of Us Part 1* game sales jumping 238% after the launch of the TV show on HBO⁵. Meanwhile streaming and broadcasting platforms benefit by tapping into new, often international, audiences that are familiar with the IP. The first episode of *Halo* (2022) broke Paramount+'s record as the most-watched original series premiere worldwide⁶.

Crossover appeal enables different elements of an IP across media to support and feed into one another – developing an active relationship. *CyberPunk: 2077* (2020) achieved this by releasing an updated patch to the original game that followed the events and characters of the newly released



anime series on Netflix, *CyberPunk: Edgerunners* (2022). This bridged the gap between the game and the anime series and diversified engagement with the IP, tapping into viewers and gamers interacting with the *CyberPunk* universe simultaneously across different media. There is potential here for strengthening and feeding engagement in gaming franchises in a more consistent way over the long term, and ultimately expanding revenue streams, with much to learn from franchises like *Marvel*, *Harry Potter* and *Star Wars*.

Different media present different opportunities

Film adaptations often reach more mainstream audiences and leverage the more widely known and instantly recognisable characters developed by gaming IPs. The medium lends itself to fun, loose adaptations that reflect only the key elements of the IP, like the recent *Sonic* and *Mario* films. Limited screen time means that the focus is less on nuance, and more on recognisable characters navigating simple and engaging narratives. IPs can be a blank

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slate upon which a compelling narrative can be imprinted. *Detective Pikachu* (2019) demonstrates how basic visual aspects of an IP can be incorporated in a fun and engaging way as a hook to attract audiences and fans..

"I've been a fan of this series for decades, and all that time, all I've really wanted to do was to just watch Pokémon in the world, doing stuff. And man, if Detective Pikachu didn't deliver on that count: we had Exploud's serving as loudspeakers, a Machop directing traffic, Aipoms hanging out on a street sign, Pikachu and Psyduck just there, being awesome". Dave Thier, Forbes⁷

TV formats allow the tone, atmosphere and mood of a game to be captured, while characters, locations and storylines can develop over time. The details and nuances of the player's experience can be leveraged through extended screen time. TV gives room to breathe for the characters, their motivations, and the emotional weight of their decisions to be represented. The recent *Halo* (2022) adaptation on

Paramount+ breathes fresh air into a much-beloved gaming IP, using the TV formula to tell a new story within the same universe. The character of Chief, the staunchly silent and masked protagonist in the game, is given more depth, and actor Pablo Schreiber is afforded room to inject more emotional range into the character⁸.

"We didn't look at the game. We didn't talk about the game. We talked about the characters and the world. So I never felt limited by it being a game." Steven Kane (Halo season 1 director)⁹

Anime offers a different avenue for adaptation. Gaming IP is not always hyper-realistic and human-centric. Developments in technology mean that games can, when supported by big budgets, be considered pieces of art. Recognisable and innovative art direction is an important part of why a game can become so popular. Beyond this, many games look to immerse players in worlds that are not rooted in realism, but rather in imagination, from the sci-fi world of *CyberPunk* to the fantasy universe of



God of War. Anime can more easily and faithfully recreate farfetched worlds, characters, and visuals.

"It's important to create a flow to let the audience empathize more with the protagonist. The original plot was rather focused on the whole mood. I basically understood their intention, which would work out for a game but I felt that the audience may not be able to empathize when adapted into an anime. There are places where I thought that it was necessary to show ingenuity and add some essence to an anime."
Masahiko Otsuka (Writer of CyberPunk: Edgerunners)¹⁰

Authentic adaptation

Recent, successful adaptations have been done faithfully, with buy-in from the creators of the games themselves. While not a bullet-proof formula for success, maintaining the emotional core that the players experience in the game is important. Adaptation does not necessarily mean replication. Some of the most popular gaming adaptations succeed by identifying the key elements

of the game to keep and those elements where creative license can be flexed to fully maximise the medium it is expanding into.

With *The Last of Us*, showrunners Mazin and Druckmann explored narratives that are merely alluded to in the game, tapping into the emotional depth and nuance of secondary characters in more detail. Highlighting that a key requirement for success is understanding how to adapt IP authentically into a new medium by identifying; which elements are essential to keep, which elements can be dropped, and which elements can be expanded on¹¹.

*"You can't repeat the game experience precisely. When playing *The Last of Us*, you are Joel. When you are watching a TV show you are not a person you are all of them, and you are connecting with and experiencing things alongside all those characters. It is a different way of approaching narrative and it requires us to make certain choices. Our goal is to make you fall in love with *The Last of Us* again and experience more, with more characters, in more ways."* Craig Mazin.¹²

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Where roadblocks can arise

A poorly received adaptation can come with implications for the reputation of the game franchise. A critically acclaimed video game may have had commercial success in its field, but it will not guarantee the same when translated into another medium. For example, the Assassin's Creed franchise has sold more than 200 million games and is seen as one of the "crown jewels" of Ubisoft. However, despite a high budget of \$125 million and star-studded casting, the film adaptation Assassin's Creed (2016) scores a 19% on Rotten Tomatoes and underachieved at the box office – making \$240 million worldwide.

Disengaging core gamer fandom

While crossing over media provides a great opportunity to broaden a franchise's audience, it can be challenging to bring in new audiences whilst also keeping existing fans happy. A beloved game will likely have fans who are very opinionated about how the game is portrayed. Video games are a very immersive medium – gamers spend

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hours being the protagonist, where their actions have consequences and they are actively engaged with the plotline. An inaccurate or poorly executed rendition of a game they love, may feel like a slight and alienate or even upset this group.

Staying true to source material

Studios adapting gaming content need to rise to the challenge of being innovative and leverage the medium's specific features whilst remaining true to the original source's key elements (e.g. narrative, tone, core message). There is room to reinvent and have fun with video games that have a less prominent and linear narrative (such as platformer, or online role-playing games). However, these games may have 15+ hours of gameplay and an extensive amount of lore to cover, creating difficult decisions when condensing into a two-hour film runtime or a miniseries. For example, best selling game series Warcraft does not have a central storyline across its games, and the film adaptation Warcraft (2016) was not able to leverage its complex lore to engage its US audiences – scoring 29% on Rotten

Tomatoes¹³. Conversely, TV series Arcane: League of Legends (2021) is a widely successful adaptation of League of Legends, scoring a remarkable 100% on Rotten Tomatoes.

Regardless of the original gaming source, it is key to remember that since gamers have spent a considerable amount of time in its universe they expect to feel a sense of familiarity and faithfulness in any adaptation into other media. Unlike adapting media such as books, for a video game, world-building is fully realised and supported by extensive investment in development.

To make the video game Cyberpunk 2077, CD Projekt RED spent an estimated 1.2 billion zloty (\$330 million) to showcase a visually stunning open world, despite its initial bugs and glitches. With key visual elements already experienced, it may be challenging for studios to translate this to a new medium without acquiring an extensive budget or alienating existing fans unhappy with the adaptation's interpretation.



Championing diversity

Further, adaptations from gaming IP may involve changes to character backstories or casting, as the TV and film industry continues to champion telling stories of diverse groups such as women, ethnic minorities, LGBTQ communities and disabled people. The gaming industry is also making headway in this area, as discussed in Ipsos' piece on the Power of Gaming Storytelling¹⁴, but has historically had issues with game protagonists skewing white and male.

There have been numerous controversial examples of female representation in gaming such as hyper-sexualisation of the female body (e.g. Lara Croft), and misogynistic and homophobic tropes (e.g. "women as rewards"). While moves away from sexism in gaming have resulted in biting backlash i.e. Gamergate in 2014, adaptations provide a great opportunity to reimagine loved stories with an inclusive lens.

Research is key in helping navigate this landscape

With the opportunities and potential

roadblocks of adapting gaming IP in mind, how can studios and publishers in the gaming and entertainment industries ensure that they can maximise engagement and appeal?

Our Media Development team of expert gamers and media researchers at Ipsos can help to achieve this, by aiding brands in producing authentic and effective game adaptations. Our team are experts in understanding audiences, content, and the relationship between them, providing insights through tested lenses and approaches that can help to establish a successful franchise.

Research can effectively nurture all parts of the creative process: before the IP has been selected, during the process of concept and content development, and after to measure the success or impact of the adaptation. For example:

Selecting the right IP

Identifying Industry Trends and the Cultural Landscape

Our expert trend watchers and semioticians can identify both macro

and micro trends affecting the gaming and entertainment industries, highlighting consumer shifts in attitude, hot topics of conversation, cultural icons and consumer behaviours. Our expert cultural analysts can also focus more specifically on uncovering how specific genres within the gaming and entertainment industries are evolving, to highlight what can be learnt from successful and impactful content. Understanding audiences' cultural landscape helps us to better understand who they are, how to talk with them, and what their references are.

Understanding appeal

Qualitative or quantitative research can be conducted before development to gauge whether selecting a certain IP is the right decision or not, by speaking with a breadth of audiences, from hardcore to non-fans.

Concept testing and content development

We can incorporate qualitative research in tandem with semiotics and cultural analysis to understand how a specific

concept will land with audiences, which elements can be improved, which can be removed, and which can be expanded on. Quantitative research can also be used to gauge audience sizes, as well as validate and quantify insights and hypotheses from qualitative studies, ultimately optimising the reach and success of any potential concepts.

Positioning and Marcomms

Alongside qualitative deep dives with gamers, our expert semioticians can evaluate and optimise the appeal and resonance content can achieve with audiences, analysing the narrative and visual elements, decoding the content within the cultural landscape, spotting any red flags or cultural insensitivities, and analysing specific features of marcomms to optimise engagement.

Measuring the success and impact of the adaptation

Market sizing

Knowing the size of your audience is key to getting the best results. A prime example of how we can help is

through our dedicated team of gaming experts that run our monthly syndicated GameTrack project across the UK, France, Germany, Spain and Italy. We interview 1000 participants each month which provides us with a full and accurate sizing of the gaming market.

Audience Understanding

Understanding your audience then provides you with valuable insights for current and future strategies. Ipsos runs a number of studies suited to supporting media business decisions. For example, our custom online panel for a well-known production company enables the client to run ad hoc surveys and ask participants to watch and evaluate popular TV series and its insights allow the client to sell their productions to broadcasters by assessing perceptions of existing and future TV programming.

ABOUT THE TEAM

Our writers work with an extended team of senior media, tech and content experts - from qualitative and quantitative research, to semiotics, neuroscience and trend analysts.

Jarnai works in quantitative research, working with a range of media and technology clients. She has years of expertise on research in the video content space, with an interest in understanding audience media habits and perceptions of broadcasters and streaming services, both domestic and global.

As a quantitative researcher Jack has worked with clients across various media industries including gaming, film and TV. Jack has a passion outside of work for gaming and now focuses his work towards gaming research, exploring both existing and emerging trends as well as market sizing and understanding.

As a qualitative researcher, Luke has been focusing on investigating audiences and their cultural landscape to help inform strategy for brands in the media and tech industry. Luke is an avid gamer with a keen interest in understanding how the media industry is evolving. He has a passion for identifying how media has been shaping culture, as well as how media brands can best engage their audiences.

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We specialise in solving a range of challenges for our clients, whether related to business, consumers, brands or society. Our areas of expertise range from brand, communication, media, innovation and healthcare research through to customer experience, corporate reputation and social and political research.

At Ipsos we are passionately curious about people, markets, brands and society. We deliver information and analysis that make our complex world easier and faster to navigate and inspire our clients to make smarter decisions.

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