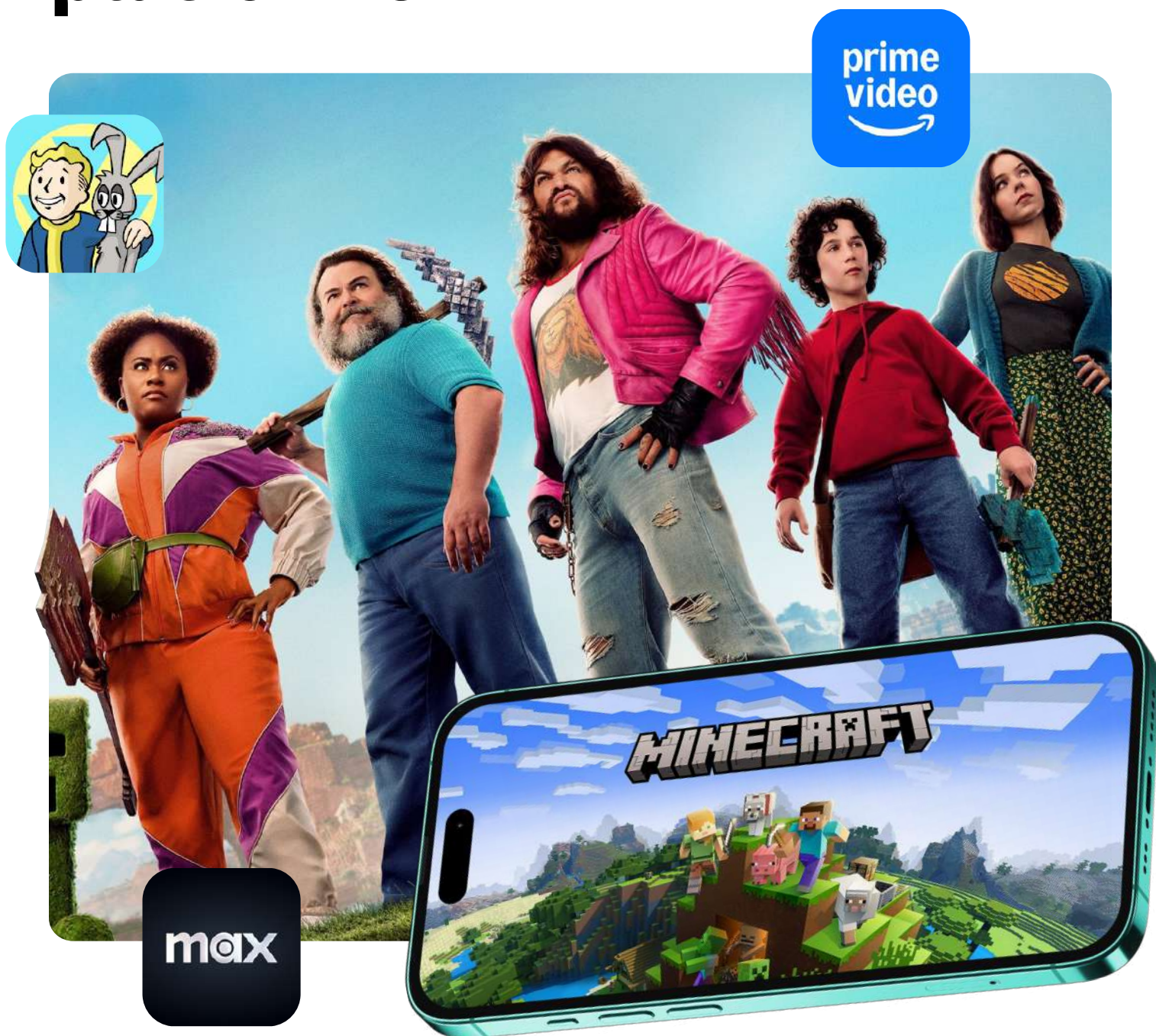


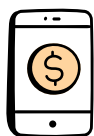
From games to the big screen: **The impact of IP across platforms**



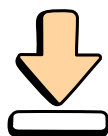
In an entertainment era hallmarked by sequels, reboots, and nostalgia plays, Hollywood is increasingly turning to video game IP to create scripted content. From TV hits like HBO's *The Last of Us* and Prime's *Fallout*, to feature films like *A Minecraft Movie* and *The Super Mario Bros. Movie*, video game adaptations have been a hit with both audiences and critics. What's more, the release of scripted content has created a boomerang effect on the original games, often leading to re-engagement and renewed popularity.

What's driving the cultural zeitgeist may be unclear, but one thing is certain: games tied to recent marquee television series and film releases are skyrocketing in popularity, seeing increases in games sold, active users, in-app purchases, and revenue, illustrating the powerful effect of leveraging a transmedia strategy.

In this report:



Mobile IAP revenue and console units sold catapulted +35% each after the release of the **Minecraft movie** in April 2025



The **Fallout TV show** drove a +20% surge in Amazon Prime Video app downloads on release week



Fallout 3 and **Fallout 4** PC DAUs remained +225% higher for 12 and 20 weeks after the show's release, and Amazon increased US ad spend on Desktop Video (+20x) to maximize the show's impact



Max app downloads and **The Last of Us** console DAUs each soared 40% when the show's second season premiered

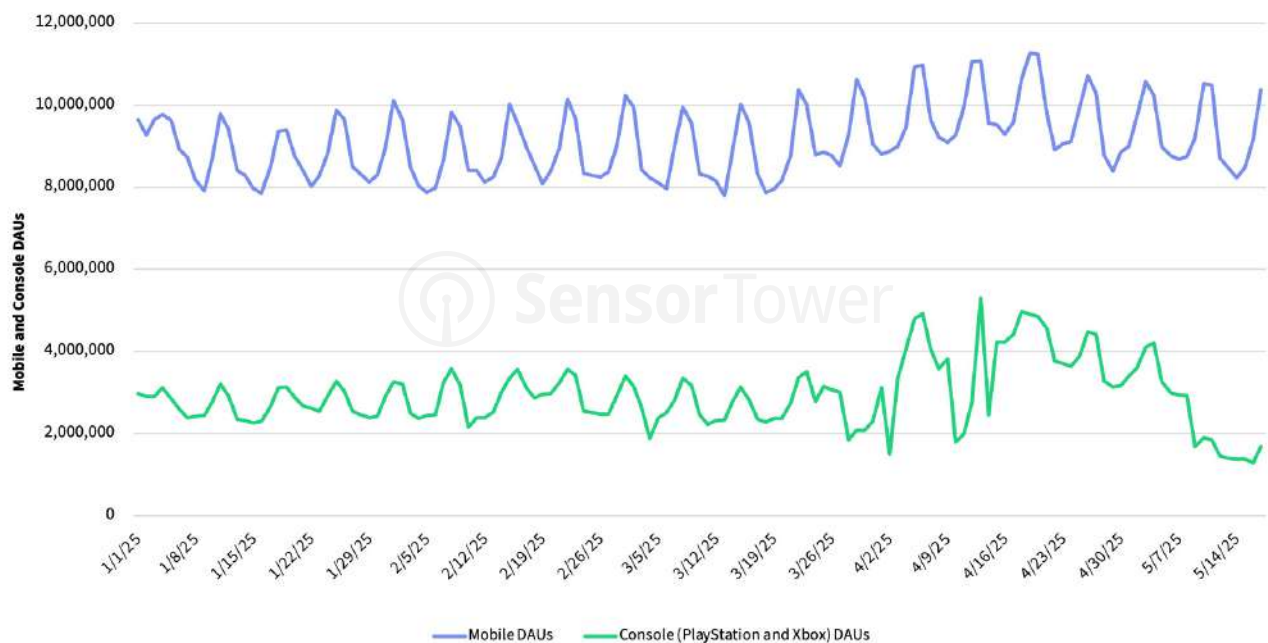


Chicken jockey's rejoice: How the Minecraft movie built and reignited consumer interest in the game

Popcorn flinging aside, the release of the Minecraft movie in April 2025 was a smashing success, grossing +\$900 million in box office for Warner Bros. The movie also drove increased interest in the already-successful Minecraft mobile and console games: mobile app IAP revenue spiked 44% and console games sold increased 36% in April, coinciding with the film's release. And it wasn't just new gamers: active user spikes in Minecraft mobile (+9%) and console (+41%) illustrate that the movie likely spurred historical players to jump back in the sandbox.

Minecraft mobile and console DAUs

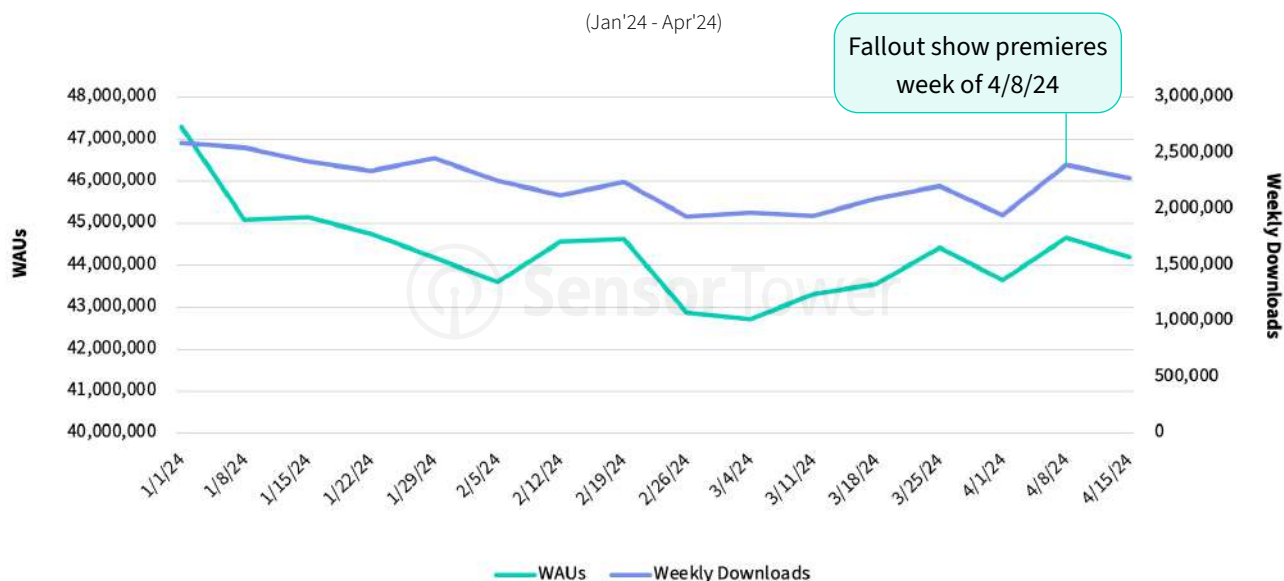
(Global, 2025 YTD)



Fallout TV show release stirs interest in Prime Video, Fallout Shelter, and legacy Fallout titles

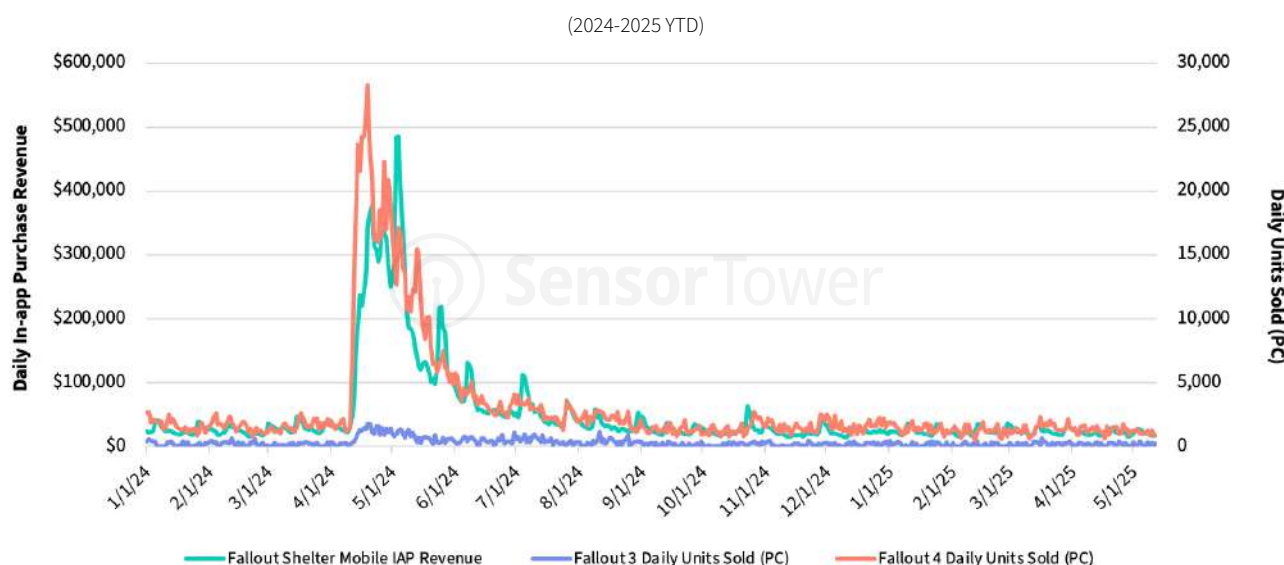
The release of the Fallout TV show in April 2024 drove a 23% increase in app downloads for Amazon Prime Video, demonstrating how releases of game IP-inspired content can also benefit the company producing this content.

Amazon Prime Video WAUs and downloads



Mobile title Fallout Shelter also saw an uptick in consumer interest during the show's release as DAUs (+77%) and IAP revenue (+150%) both soared. Capitalizing on the tailwinds surrounding the show's release, the PC versions of both Fallout 3 and Fallout 4 dropped in price that week, propelling daily games sold by 125% and 410%, respectively. This also contributed to a +110% increase in PC DAUs for both titles as new and returning players alike flocked to the survival RPG to enhance their experience or enjoyment of the show (or vice versa).

Fallout Shelter mobile in-app purchase revenue and Fallout 3 and Fallout 4 PC daily units sold

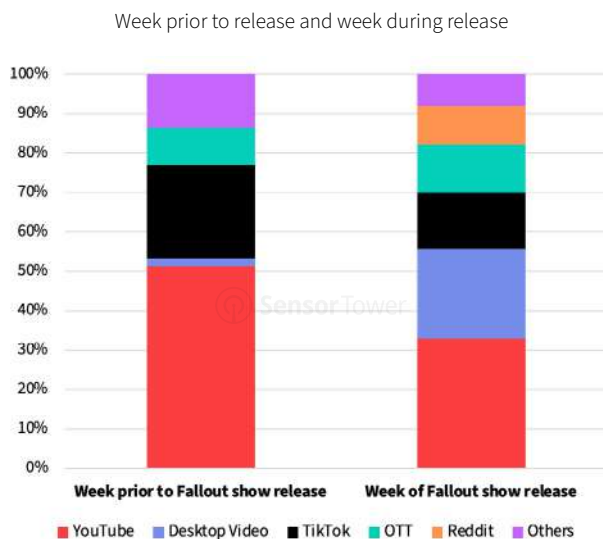


Usage of games tied to hit TV and film content persists post-release

Perhaps more impressive, this re-energizing effect with the original game IP was long-lasting: Fallout 3 and Fallout 4 PC DAUs remained +225% higher for 12 and 20 weeks after the show's release, respectively, vs the month prior to its premiere. However, Fallout Shelter, bolstered by its free-to-download and play status on mobile, has kept its momentum going with app DAUs up 26% YTD.

Amazon tailored various digital ad promotions around the release of Fallout to maximize the show's impact and popularity, releasing video campaigns across digital and OTT channels. 82% of total US digital ad spend for the Fallout TV show during its release week was allocated to video-first platforms such as YouTube (33%), Desktop Video (23%), TikTok (14%) and OTT (12%). On a week-over-week basis, Amazon increased US ad spend most heavily on Desktop Video (+20x) vs other platforms. More than half (52%) of that US Desktop Video ad spend was on platforms with a gaming focus (such as Twitch, IGN and Gamespot), showcasing how the entertainment company's cross-promotional advertising efforts benefitted both Amazon and Microsoft.

Fallout TV show US digital ad spend by channel

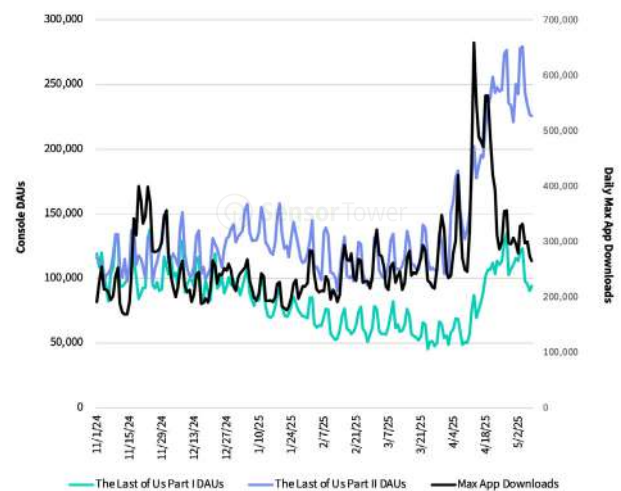


Transmedia success varies with IP format and adaptation faithfulness

HBO's hit series, The Last of Us, premiered its second season on HBO Max in April 2025, spurring a 6% and 40% increase in DAUs and downloads, respectively. While Fallout's historic gains in app revenue and games sold were likely driven by the FTP nature of its mobile title and the uniqueness of the show's story from the game, results for The Last of Us hinged on bringing new awareness to the franchise. Despite exhibiting an uptick in units sold for The Last of Us Part II on console, the revenue impact is likely minimal for Naughty Dog given pre-existing low purchase numbers. Yet the lift in awareness from the show's release was palpable: The Last of Us Part I and Part II DAUs each rose +40% upon the premiere of The Last of Us Season Two. This could contribute to greater hype around a potential sequel to The Last of Us Part II.

The Last of Us Part I and Part II Console DAUs and Max App Downloads

(Nov'24 - May'25 MTD)



Will the popularity of this growing genre continue to spur growth in both the entertainment and gaming industries alike? Only time will tell. Sensor Tower will be watching, so stick with us as we monitor the latest trends across mobile, gaming, and digital.



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Founded in 2013, Sensor Tower's mobile app insights have helped marketers, app, and game developers demystify the mobile app ecosystem with visibility into usage, engagement, and paid acquisition strategies. Today, Sensor Tower's digital market insights platform has expanded to include Audience, Retail Media, and Pathmatics, helping brands and advertisers understand their competitor's advertising strategies and audiences across web, social, and mobile.

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