



Landscape Shifts in IP Gaming

An analysis of how the competitive landscape of IP in gaming has shifted in 2023

Introduction to IPs	03
IP Mobile Gaming Landscape	05
IP Collaboration In-App Events	16
PC/Console IP	23
Hogwarts Legacy Launch	21
The IP Opportunity	29
Summary	32



Sensor Tower tracks Licensed IPs across mobile gaming

What is an IP?

IP stands for “intellectual property.” Intellectual properties are a class of property that include intangible creations of the human intellect. Star Wars is an example of an IP that is owned by Disney.

What do Sensor Tower’s Licensed IP tags track?

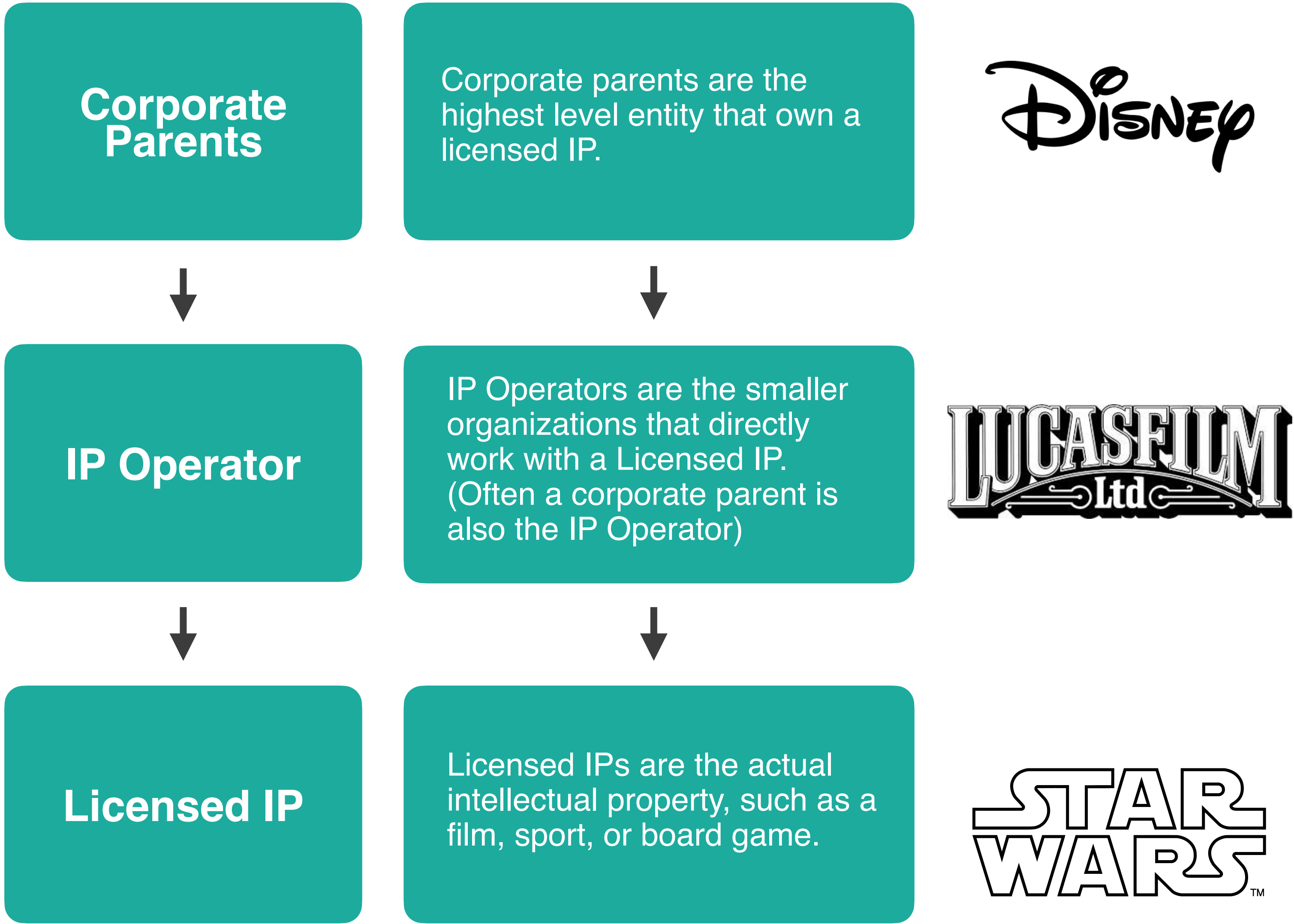
Licensed IP tags identify mobile games that leverage an existing brand that originated from outside mobile gaming, for example books, television shows, toys, or celebrities. Video game IPs that have a large presence in a non-video-game format (for example Tomb Raider) are also included. For each of the 500+ intellectual properties we track, we include Corporate Parent, IP Operator, and Media Type. Intellectual properties often have complex ownership rights and histories, so we default to the primary or most well-known operator, corporate parent, and media type.

For example, Disney is the corporate parent of IP Operator Lucasfilm, which runs the Star War Licensed Intellectual Property.

\$16 billion

grossed by mobile IP games via in-app purchases in 2023

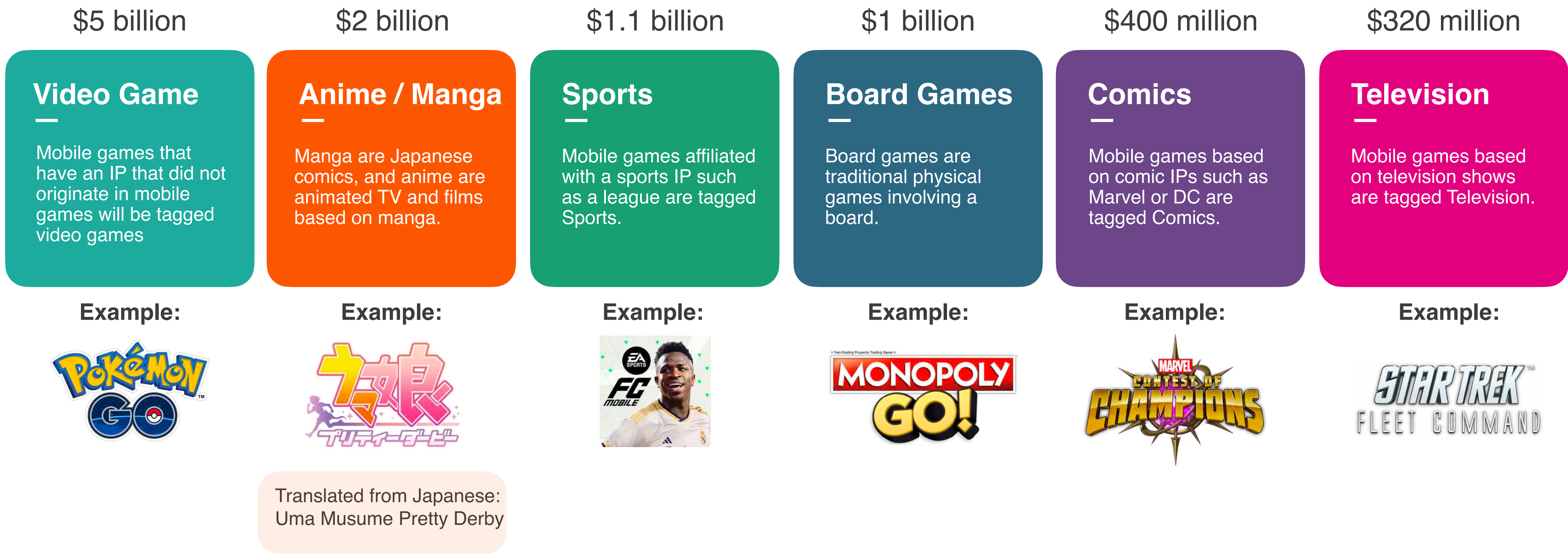
Example:



What are Sensor Tower's IP Media Tags?

Sensor Tower's Game Taxonomy categorizes IPs into media types based on their best known original format. Here are some examples of media types we track:

2023 worldwide gross revenue from in-app purchases by IP Media Type

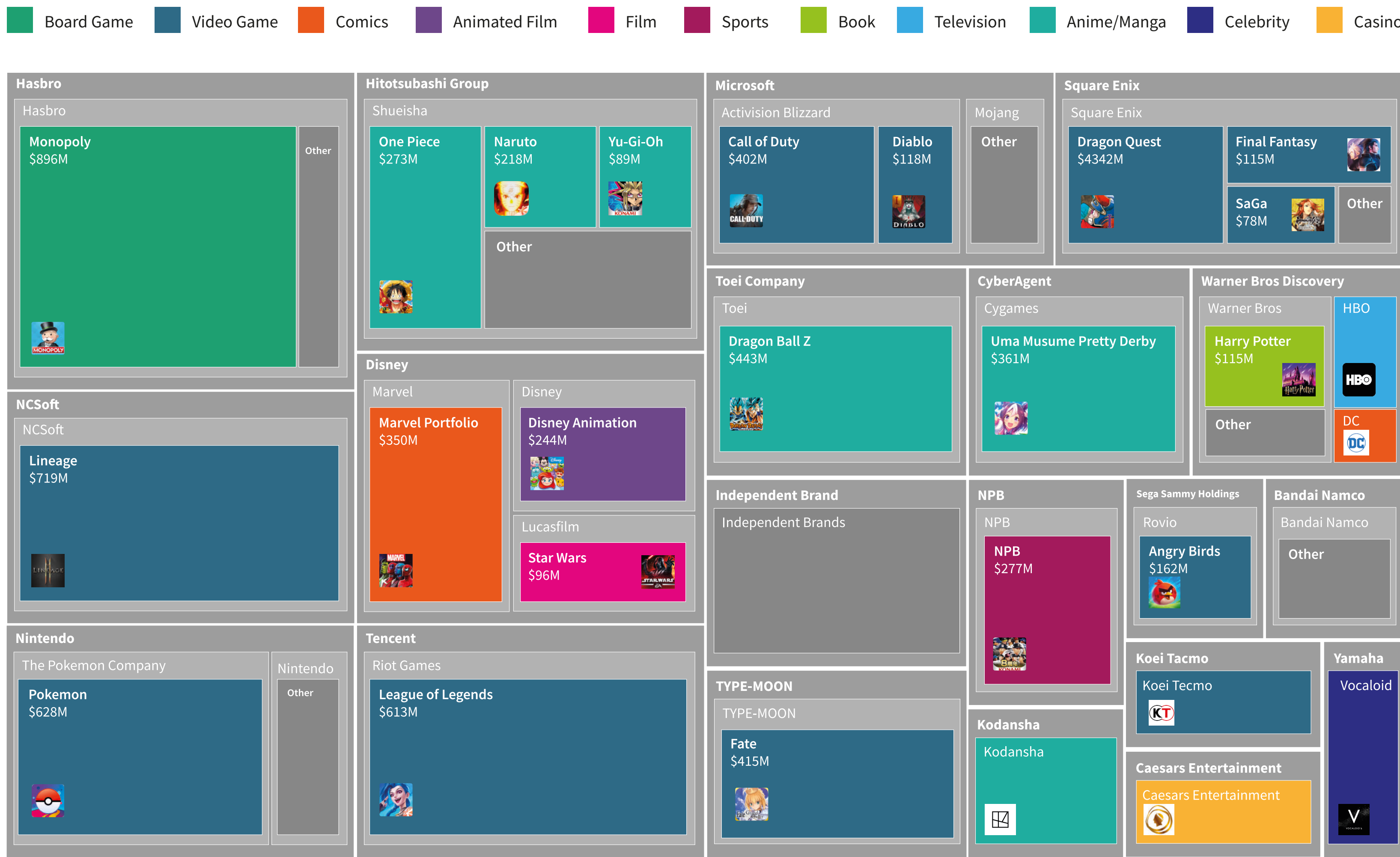


Hasbro is the top IP Corporate Parent by IP mobile gaming revenue

- MONOPOLY GO! took the world by storm, propelling Hasbro to its current dominant position.
- IP corporate parent success tends to be hit driven and focused on a single IP media type.
- The next top three IP Corporate Parents after Hasbro are all Asian, one South Korean and two Japanese.
- #2 NCSoft’s Lineage RPG games have proven to be incredibly lucrative with Asian audiences, particularly South Korea.
- Nintendo taking #3 is no surprise with Pokemon GO.
- #4 Hitotsubashi Group’s Shueisha bucks the trend of having one IP carry an IP corporate parent to success. Shueisha regularly generates manga hits, the biggest of which by mobile gaming revenue are One Piece, Naruto, and Yu-Gi-Oh!.
- #5 Disney also bucks the trend by having more than one hit IP and various IP Media Types, achieved through acquisitions.
- While Riot Games’ Wild Rift has not reached fellow Tencent MOBA and #1 mobile game by revenue in the world Honor of Kings’ level of success, it’s success catapulted Tencent to be the #6 IP Corporate Parent.

2023 mobile game revenue by corporate parent, corporate operator, licensed IP, and IP media type

Revenue corresponds to area
Top 20 corporate parents by IP mobile gaming revenue, Worldwide, App Store and Google Play



Hasbro is the IP Corporate Parent and also the IP Operator. Its biggest IP by revenue is Monopoly.



Scopely is the top IP mobile game publisher 2023 with MONOPOLY GO!.

Top publishers by worldwide unified revenue from IP mobile games

Country

Japan

China

South Korea






USA

2020	2021	2022	2023
<div><div>1</div><div>BANDAI NAMCO</div><div></div></div>	<div><div>1</div><div>BANDAI NAMCO</div><div></div></div>	<div><div>1</div><div>NCSOFT</div><div>+1</div></div>	<div><div>1</div><div>Scopely</div><div>+9</div></div>
<div><div>2</div><div>SQUARE ENIX</div><div>+2</div></div>	<div><div>2</div><div>NC SOFT</div><div>+1</div></div>	<div><div>2</div><div>BANDAI NAMCO</div><div>-1</div></div>	<div><div>2</div><div>Tencent</div><div>+1</div></div>
<div><div>3</div><div>NC SOFT</div><div>+5</div></div>	<div><div>3</div><div>SQUARE ENIX</div><div>-1</div></div>	<div><div>3</div><div>Tencent</div><div>+5</div></div>	<div><div>3</div><div>BANDAI NAMCO</div><div>-1</div></div>
<div><div>4</div><div>Niantic</div><div>+1</div></div>	<div><div>4</div><div>CyberAgent</div><div>NEW</div></div>	<div><div>4</div><div>SQUARE ENIX</div><div>-1</div></div>	<div><div>4</div><div>Niantic</div><div>+1</div></div>
<div><div>5</div><div>Sony Corporation</div><div>-2</div></div>	<div><div>5</div><div>Niantic</div><div>-1</div></div>	<div><div>5</div><div>Niantic</div><div></div></div>	<div><div>5</div><div>NC SOFT</div><div>-4</div></div>
<div><div>6</div><div>Netmarble Games</div><div>-4</div></div>	<div><div>6</div><div>Netmarble</div><div></div></div>	<div><div>6</div><div>CyberAgent</div><div>-2</div></div>	<div><div>6</div><div>SQUARE ENIX</div><div>-2</div></div>
<div><div>7</div><div>Konami</div><div>+1</div></div>	<div><div>7</div><div>Sony Corporation</div><div>-2</div></div>	<div><div>7</div><div>Sony Corporation</div><div></div></div>	<div><div>7</div><div>Sony Corporation</div><div></div></div>
<div><div>8</div><div>Scopely</div><div>+2</div></div>	<div><div>8</div><div>Tencent</div><div>+2</div></div>	<div><div>8</div><div>Netmarble</div><div>-2</div></div>	<div><div>8</div><div>CyberAgent, Inc.</div><div>-2</div></div>
<div><div>9</div><div>Electronic Arts</div><div></div></div>	<div><div>9</div><div>Konami</div><div>-2</div></div>	<div><div>9</div><div>Konami</div><div></div></div>	<div><div>9</div><div>Netmarble</div><div>-1</div></div>
<div><div>10</div><div>Tencent</div><div>-4</div></div>	<div><div>10</div><div>Scopely</div><div>-2</div></div>	<div><div>10</div><div>Scopely</div><div></div></div>	<div><div>10</div><div>Konami</div><div>-1</div></div>

RPGs are the top genre for IP media games and the top two IP media types

- Worldwide, RPGs drive 36% of all IP mobile game revenue. The drive to collect and interact with favorite IP characters seems to be a top monetization motivation for IP mobile games.
- Fate/Grand Order is the top grossing video game IP RPG (it is also has a very popular anime series). Fate/Grand Order and top anime/manga IP game Uma Musume Pretty Derby also showcases effective character gacha monetization.
- Scopely essentially created the Board Game Casino category and carries it with MONOPOLY GO!.
- In Sports, the top IP game is EA Sports FC, who recently ended their partnership with FIFA. Instead, EA is currently partnering with FIFPRO for this game, like several other Soccer/Football sports games.
- Interestingly, Comics’ top genre is Action. While Comic RPGs win out as a category in Asia, Comic Action games are more popular in the US and EU. Comics as a category drive more revenue in the West.

Top IP media types by revenue
Worldwide, 2023, App Store and Google Play

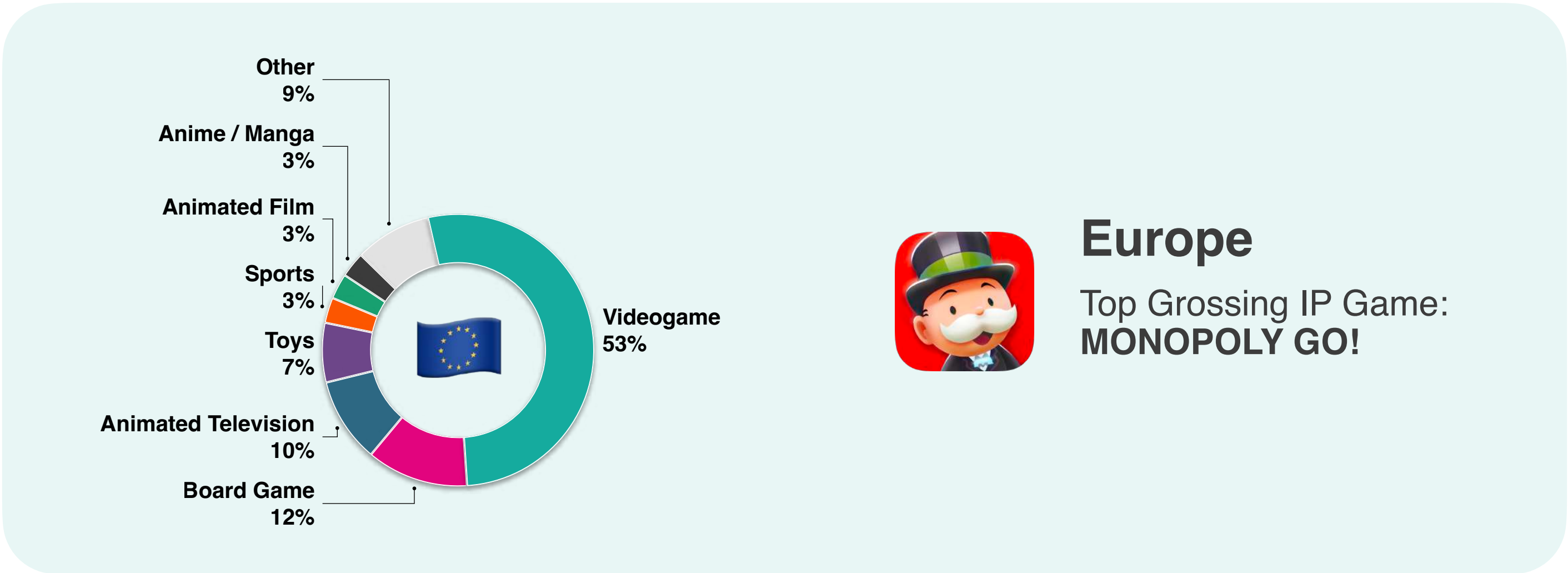
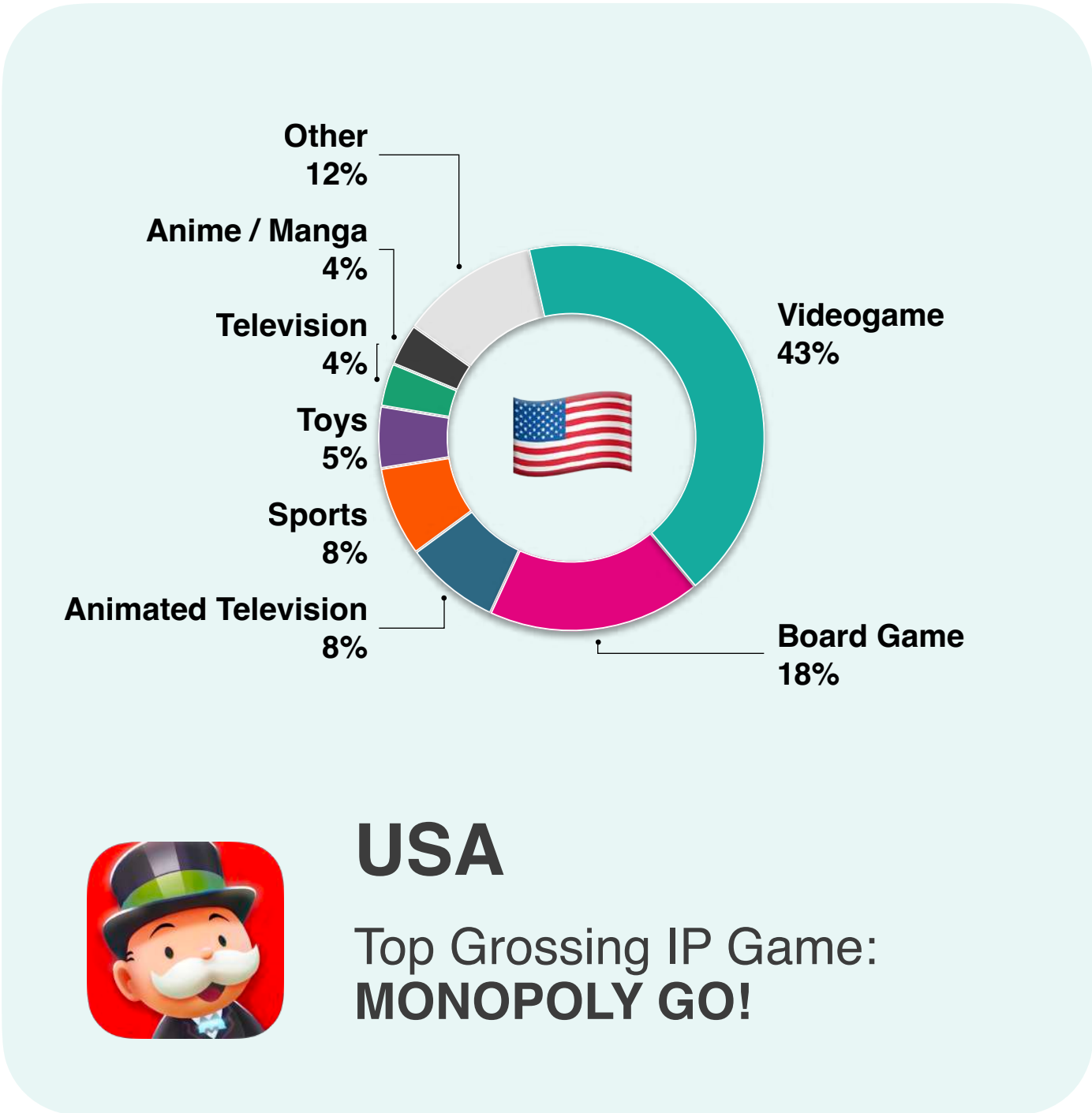
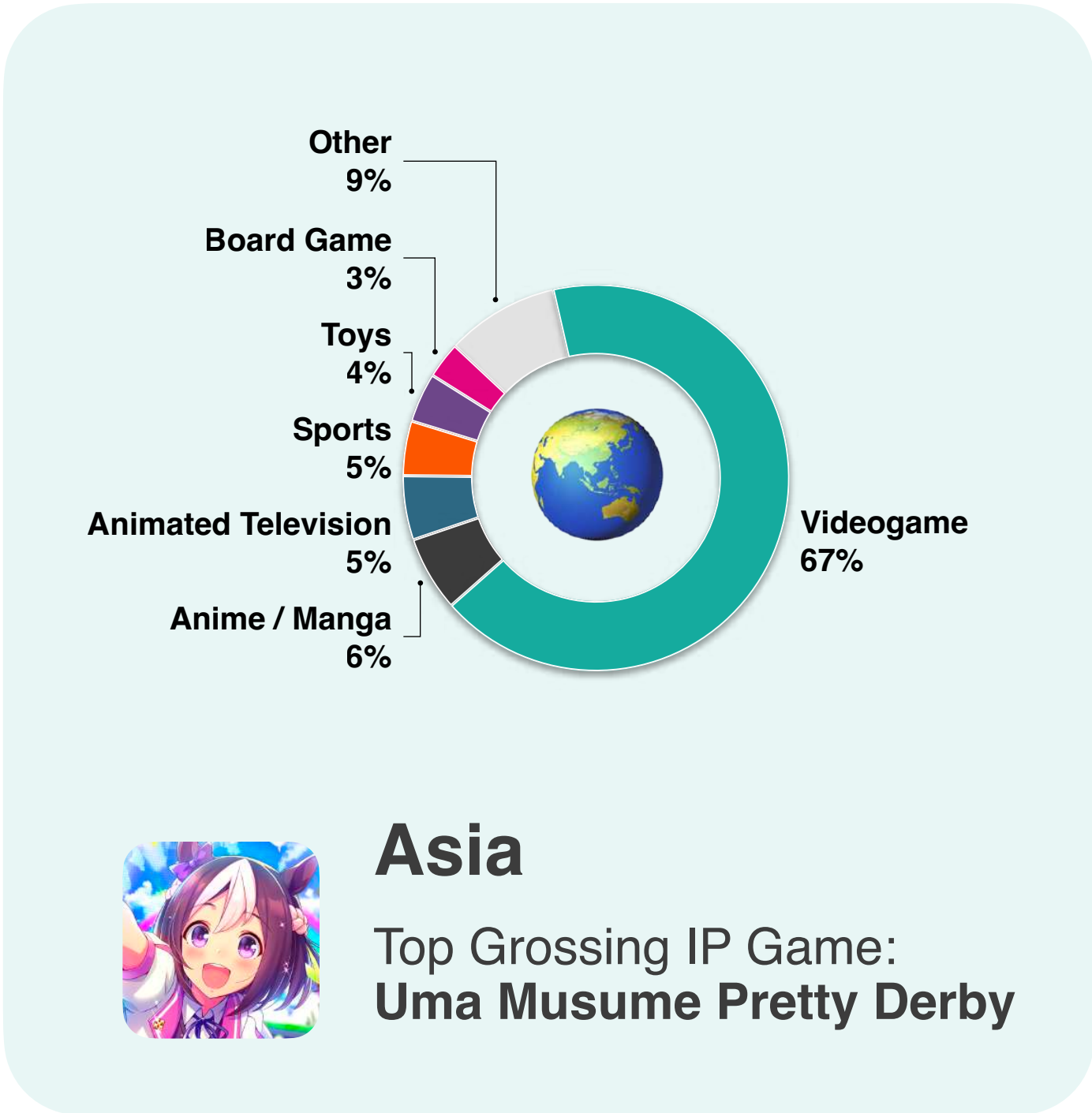
Media Type		Top Genre	Top Grossing Game of this Media Type and Genre	
1	Videogame	RPG	Fate/Grand Order	
2	Anime/Manga	RPG	Uma Musume Pretty Derby	
3	Sports	Sports	EA Sports FC	
4	Board Game	Casino	MONOPOLY GO!	
5	Comics	Action	Marvel Contest of Champions	



Video game IP are especially popular in Asia

- While video game IPs are the #1 IP media type globally, they are particularly dominant in Asia, where they drive 70% of all IP gaming downloads.
- The new top IP mobile game in the world, MONOPOLY GO!, is #1 in the west, but #24 in Asia.
- Despite video games being the dominant IP Media Type in Asia (and the rest of the world), the top grossing IP game in Asia, is not a video game IP game, but an anime one: Uma Musume Pretty Derby.
- In the US and Europe, video game IPs are #1, but board game IPs are the next most popular in downloads. In contrast, Asia's second most downloaded IP media type is Anime/Manga.

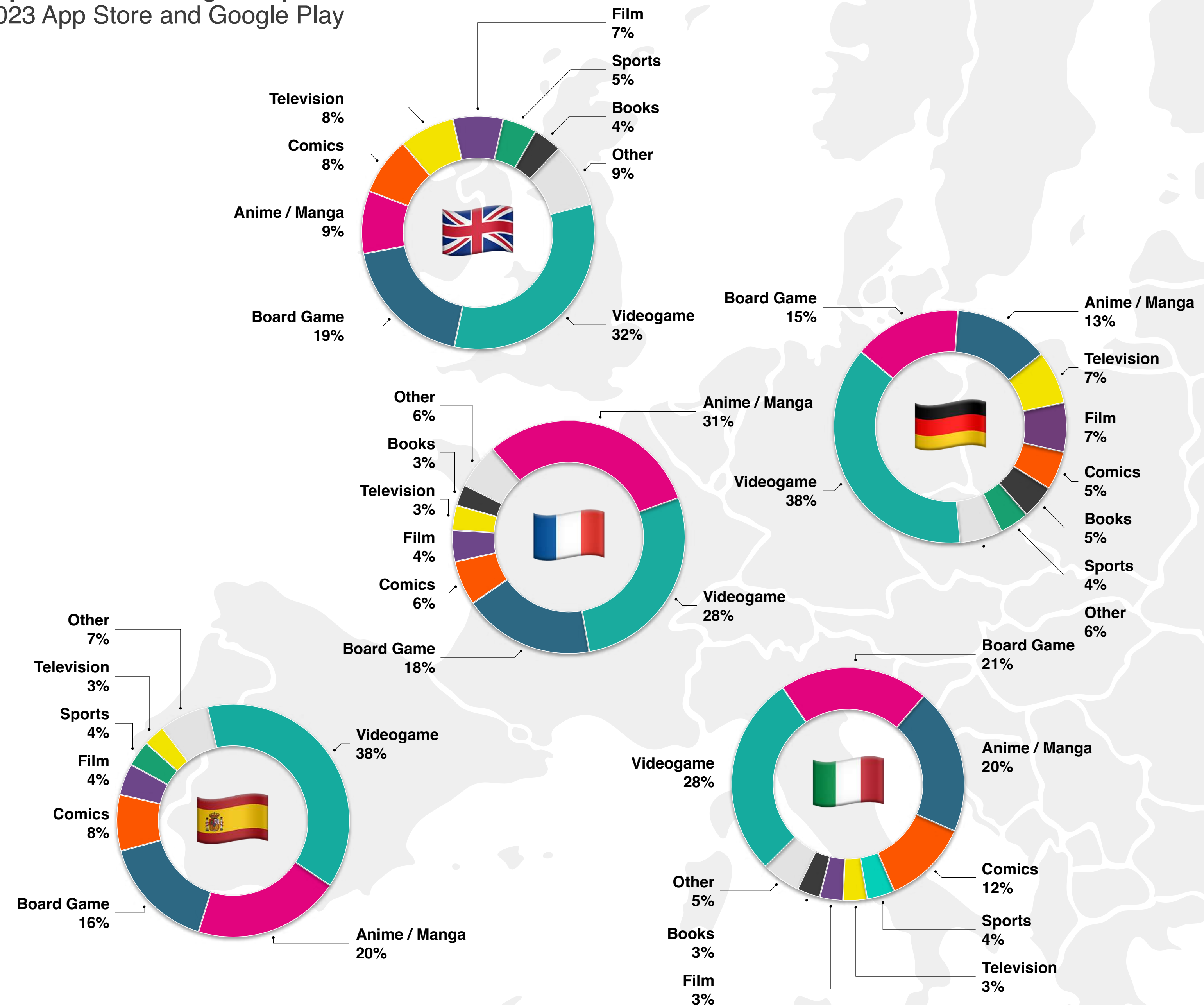
IP Downloads by Media Type, split by region
2023 Google Play and App Store



France uniquely drives more anime IP mobile revenue than video game IP

- The top two IP anime mobile games by revenue in France are both Dragon Ball Z games.
- Spain and Italy also have significantly higher anime revenue market share than the UK and Germany.
- Video game IPs drive the most revenue of any IP media type in the EU and in most EU countries.
- The second most revenue driving media types for most European countries is Anime/Manga IPs, with Board Game IPs in third.
- The UK is an exception, with Board Game IPs generating more revenue than Anime/Manga.
- Fourth place varies, with the UK and Germany preferring Television IPs and France, Spain, and Italy preferring Comic IPs.

Mobile game revenue by IP media type
Top revenue driving European countries
2023 App Store and Google Play



Synergistic media types and IP drive the most revenue

- The top mobile genre for video game and anime/manga IPs is RPG. These media types fit naturally with role-playing games, as fans want to interact with popular characters and be immersed in the IP’s world, which RPGs excel at. In particular, fans’ desire to own their favorite characters motivates them to monetize in RPG gacha systems. This is especially true in the East.
- Adapting sports IPs as a simulation game of that sport is an obvious choice, whether as a simulation of the sport itself or a simulation of managing a sports team.
- Casino tops the list of top board game IP genres with MONOPOLY GO!, the top mobile game by US revenue. While casino may not be as obvious of a fit to board game IPs as the tabletop genre, it is more optimized to mobile game mechanics and monetization.
- While it makes sense that Comic IPs would gravitate naturally to action games, it’s interesting that it differs significantly from Anime/Manga, which are essentially just Japanese (and other asian) comics and animations. This highlights the difference between how audiences approach these media types.

Top genres by revenue for top IP media types by revenue
Worldwide, 2023, App Store and Google Play

Rank	Video Game	Anime/ Manga	Board Game	Sports	Comics
1	RPG	RPG	Casino	Sports	Action
2	Geolocation	Action	Tabletop	Strategy	RPG
3	Strategy	Strategy	Strategy	RPG	Strategy
4	Shooter	Sports	Puzzle	Racing	Puzzle
5	Action	Arcade	RPG	Action	Simulation

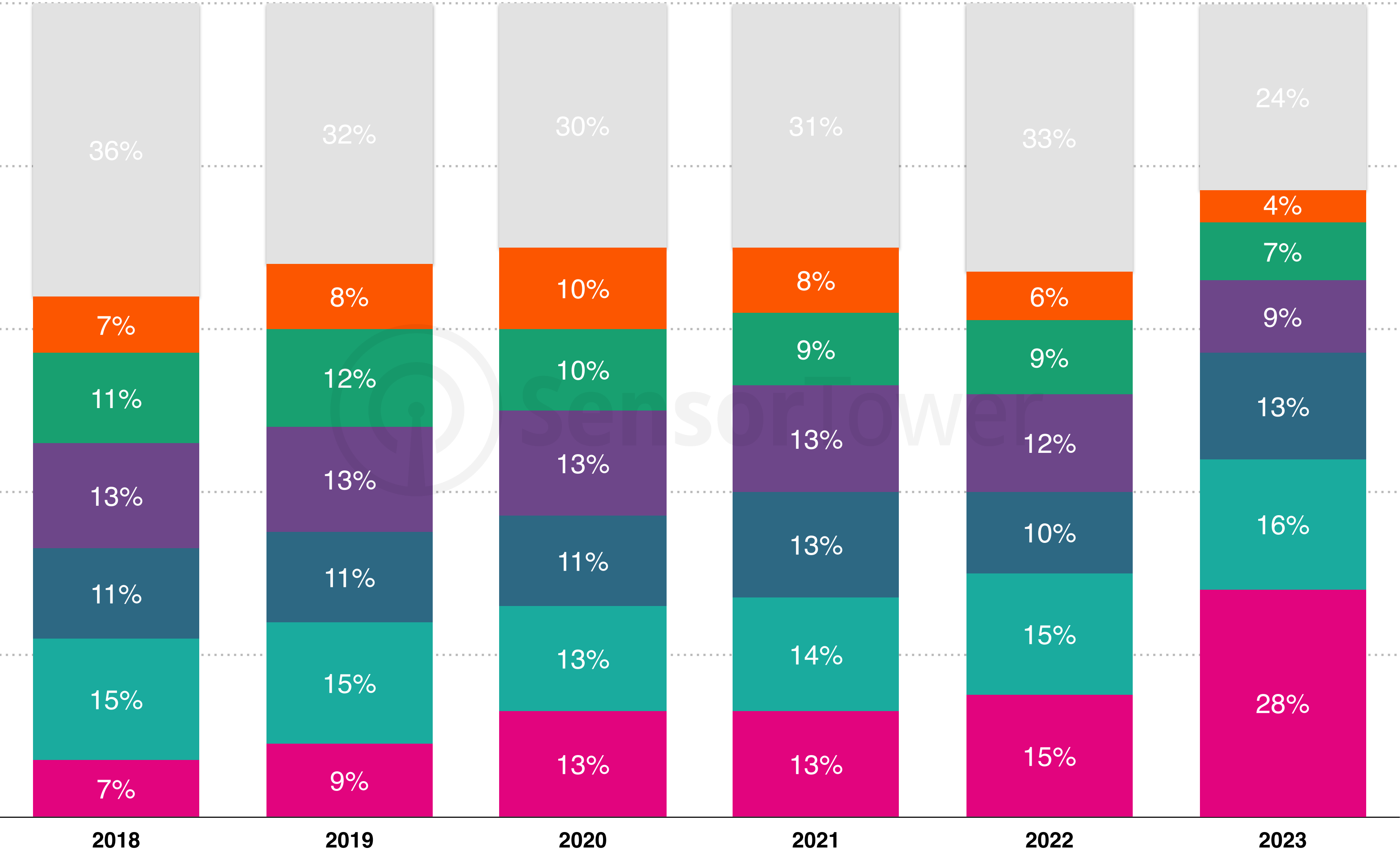


Board game IP mobile gaming US revenue market share boosted by MONOPOLY GO! in 2023

- Board game IP mobile games have always been strong in the US, but now take up nearly a third of IP mobile gaming revenue.
- Celebrity and Television IP mobile game downloads have been declining.
- Toys show decline in 2023.
- Sports have held steady.
- The top 6 media types have gained significant market share. from less popular media types.

Downloads market share by IP media type
US, App Store and Google Play

Board Game Sports Animated Television Toys
Television Celebrity Other



Growth for individual Licensed IP revenue is found primarily in new launches

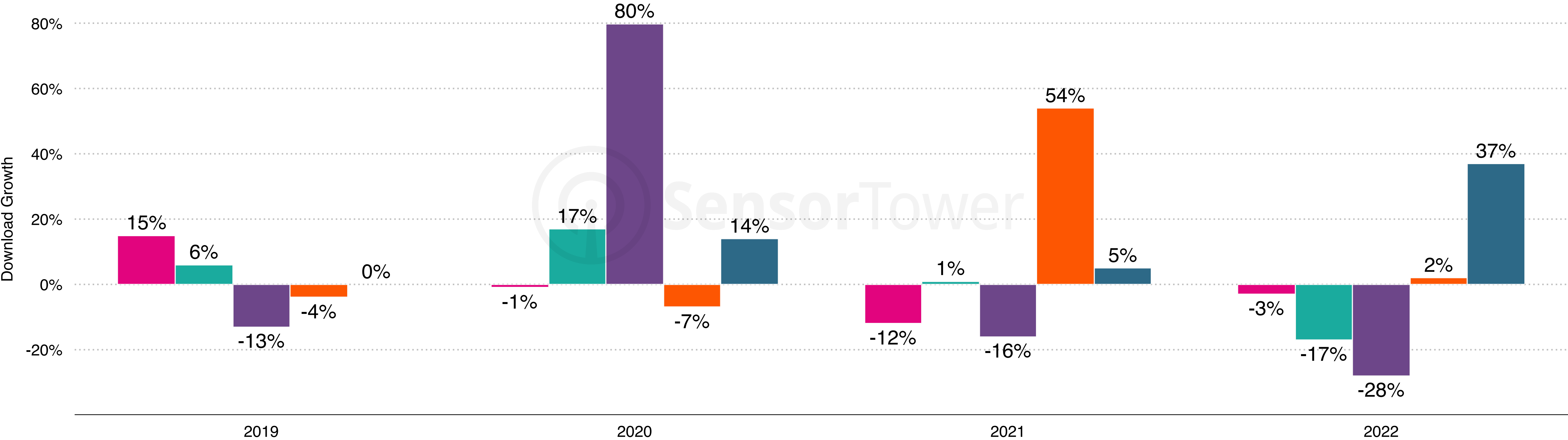
% revenue growth year over year, selected top IPs by worldwide revenue
Worldwide, App Store and Google Play

Dragon Ball Z Marvel Portfolio Disney Animation One Piece FIFA

2020: Disney: Twisted Wonderland releases, virtually all revenue driven in Japan.

2021: One Piece: the Voyage releases in China

2023: Revenue increase driven primarily from EA Sports FC Mobile.



MONOPOLY GO! on top in the US, but three out of the top ten are Marvel IP from three different publishers

Top IP mobile games by US revenue, 2023 YTD
App Store and Google Play

Media Type

Board Game

Casino

Video Game

Film

Anime

Comics

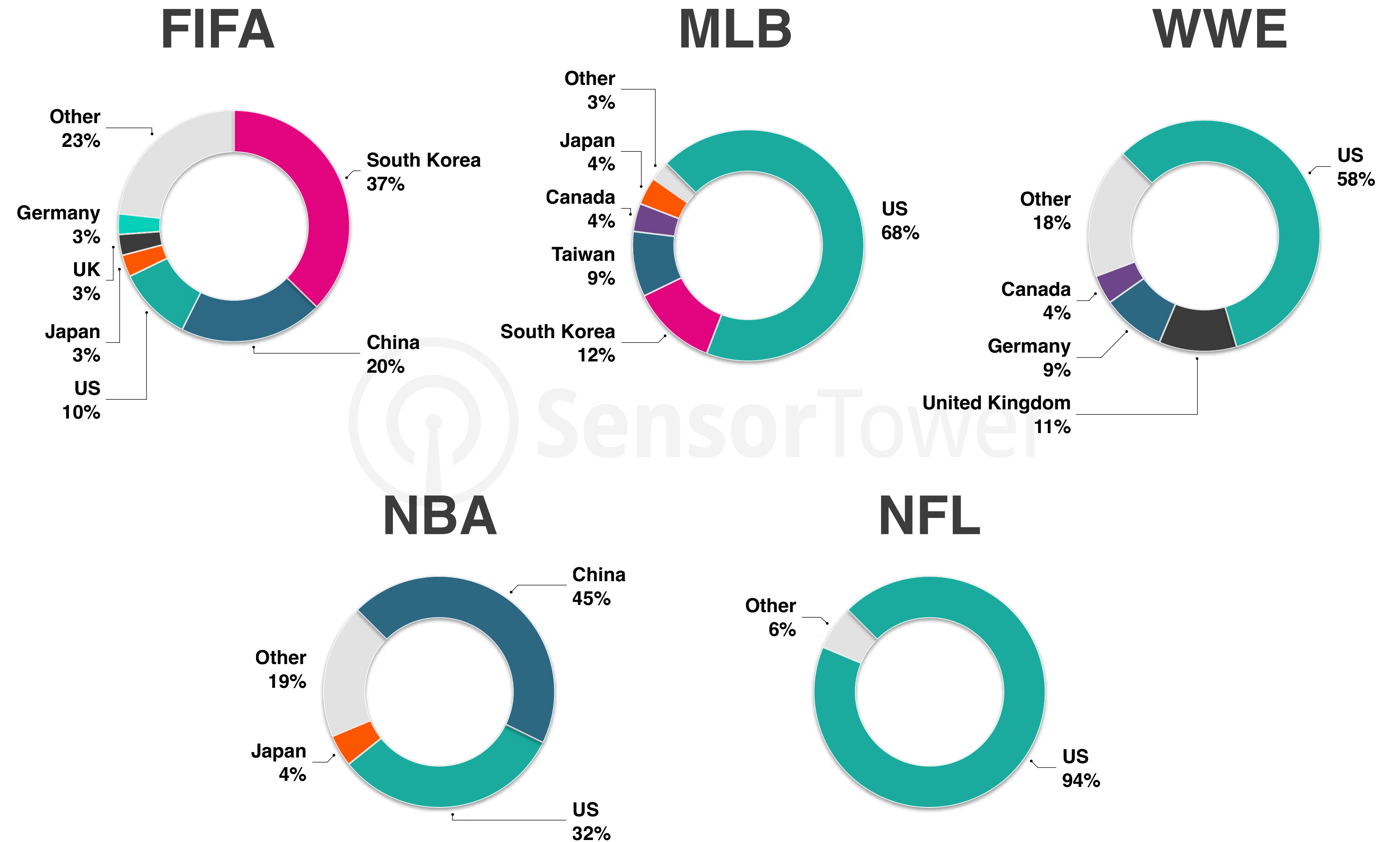
Game		Licensed IP	IP Operator	Corporate Parent
1	 MONOPOLY GO! Scopely	Monopoly	Hasbro	Hasbro
2	 Pokémon GO Niantic	Pokémon	The Pokémon Company	Nintendo
3	 Call of Duty®: Mobile Activision Blizzard	Call of Duty	Activision Blizzard	Activision Blizzard
4	 Dragon Ball Z Dokkan Battle BANDAI NAMCO	Dragon Ball Z	Toei	Toei Company
5	 Dragon Ball Legends BANDAI NAMCO	Dragon Ball Z	Toei	Toei Company
6	 Marvel Contest of Champions Netmarble	Marvel Portfolio	Marvel	Disney
7	 WSOP Poker: Texas Holdem Game Playtika	World Series of Poker	Caesars Entertainment	Caesars Entertainment
8	 Star Wars: Galaxy of Heroes Electronic Arts	Star Wars	Lucasfilm	Disney
9	 Marvel Snap Bytedance	Marvel Portfolio	Marvel	Disney
10	 Marvel Strike Force: Squad RPG Scopely	Marvel Portfolio	Marvel	Disney



US and Asia are the most important regions to top Sports IPs in mobile games

- With the end of EA and FIFA's partnership, we can expect FIFA position in the top Sports IPs in mobile gaming to fall precipitously.
- South Korea contributes the largest share of FIFA mobile gaming revenue and the second largest share of MLB mobile gaming revenue.
- China is the biggest revenue contributor for NBA mobile games, beating out the US.
- The NFL is incredibly US centric.
- The WWE is popular in the US and Europe, lacking the popularity in Asian countries other Sports IPs have.

Top 5 sports licensed IPs revenue by country
2023, Worldwide, App Store and Google Play



Celebrities and influencers seem to be on relatively equal footing in driving downloads

- Of the top 10 celebrity licensed IPs, five are influencers, two are celebrities, two are characters, and one is a musical K-pop group.
- The “Ellen” IP games are “Heads Up!”, “Psych! Outwit Your Friends”, and “Heads Up! Charades for Kids”, three social party games created in collaboration with Ellen Degeneres.
- Three of the influencers are YouTubers targeting kids and families (Ryan’s World, FGTeeV, Vlad and Nikki).
- Hatsune Miku is an anime-style virtual idol. The Hatsune Miku rhythm game drives the most revenue of any celebrity IP game in the US and worldwide.

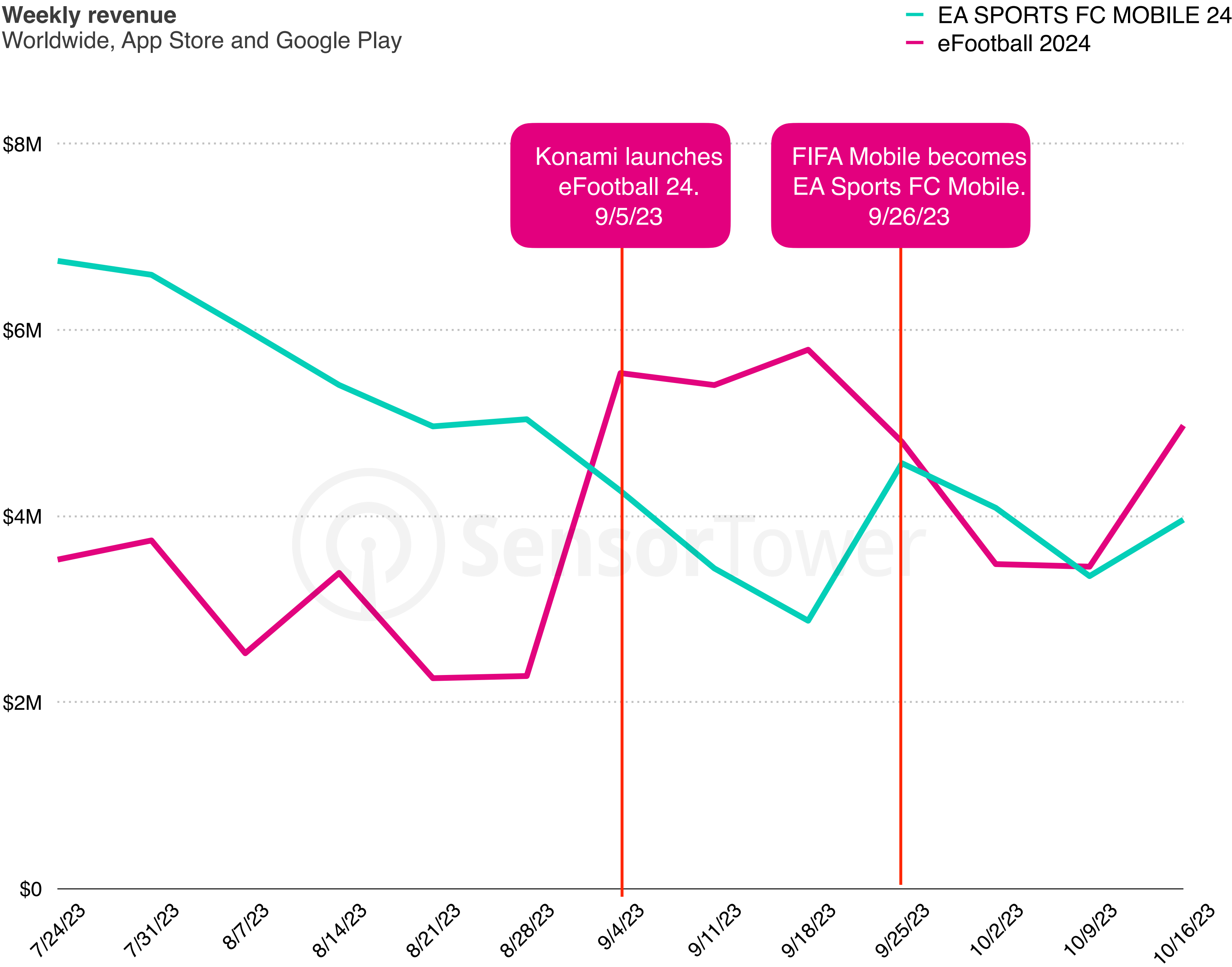
Top celebrity licensed IPs by downloads
2023, US, App Store and Google Play

Rank	Celebrity IP	Type
1	Ellen	Celebrity
2	Ryan’s World	Influencer
3	Hatsune Miku	Character
4	Gordon Ramsay	Celebrity
5	Blackpink	Musical Group
6	Pewdiepie	Influencer
7	Chuck E. Cheese	Character
8	Kardashians	Influencer
9	FGTeeV	Influencer
10	Vlad and Niki	Influencer



Konami's eFootball surpasses EA FC revenue at launch

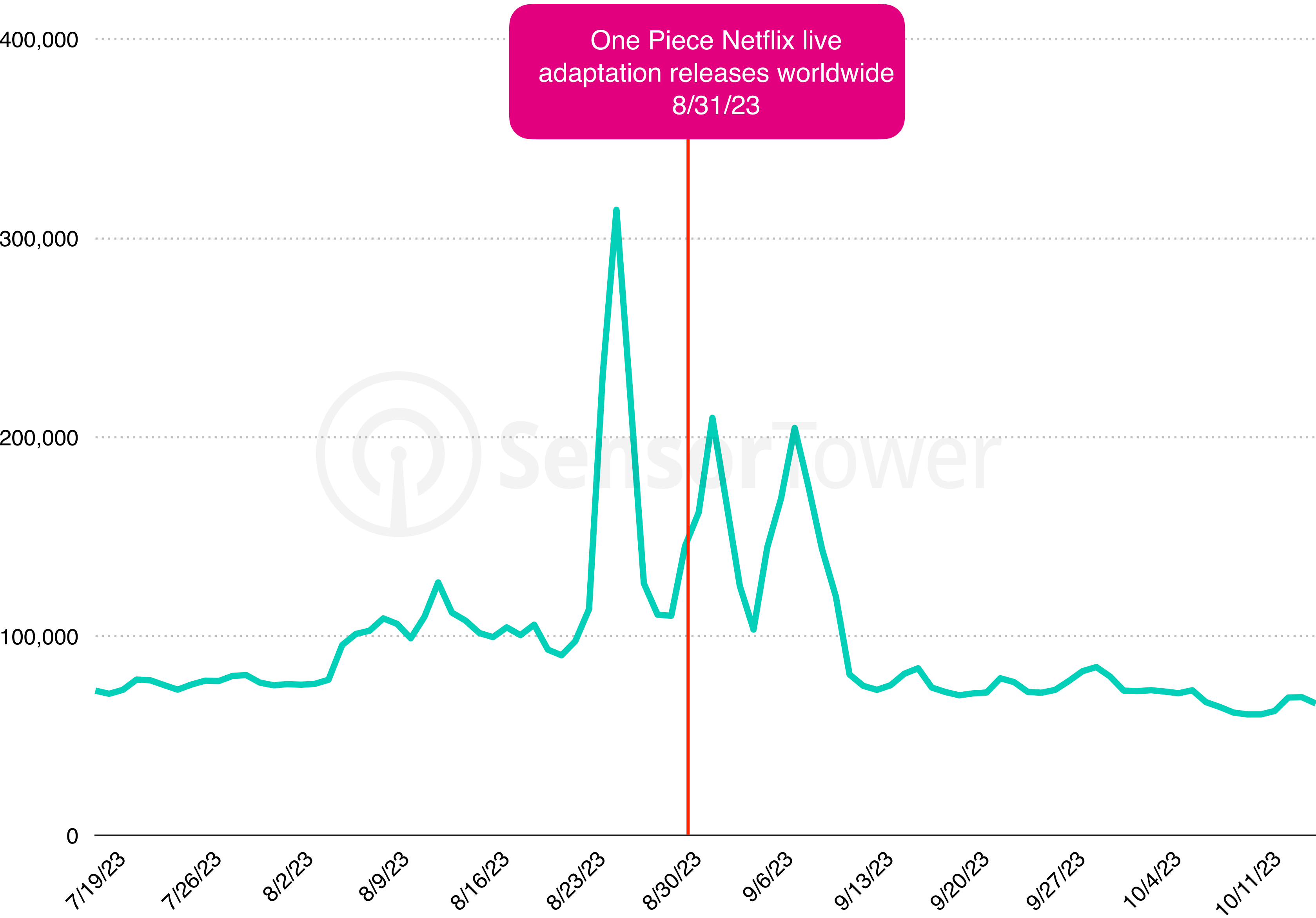
- Konami launched eFootball just a few weeks before EA rebranded from FIFA to FC.
- eFootball's revenue dropped a few weeks after launch, coinciding with EA's rebrand from FIFA to FC.
- EA's title saw a significant boost in revenue the week it became FC.
- eFootball's top three countries by revenue over this time period are Japan, China, and Thailand, while FC's top three are South Korea, US, and China.
- eFootball launched with an in-app "startup campaign" event.



The week ahead of One Piece release saw mobile game downloads spike

- Netflix’s live adaptation of legendary anime series One Piece has benefited One Piece IP mobile games, which saw downloads increase in this period.
- The largest spike in downloads coincided with promotional events just before.
- Downloads spiked in Vietnam 450% on August 26, 2023 compared to the previous day. Indonesia downloads spiked nearly 200% on the same day.
- Spikes are most noticeable for mobile game “Voyage: The Grand Fleet”, though other games also saw increases.

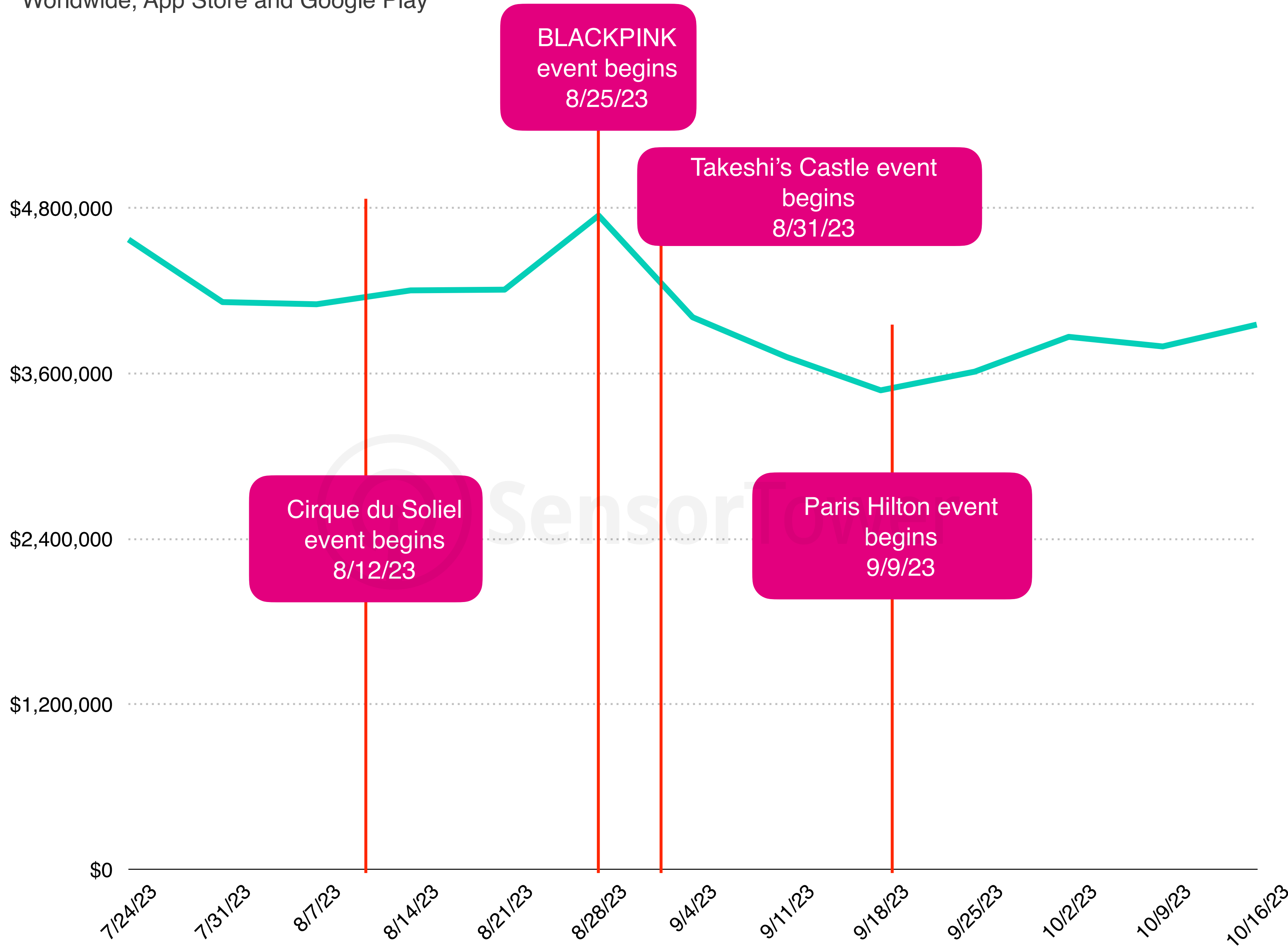
Daily downloads of One Piece IP games
Worldwide, App Store and Google Play



Roblox shows its versatility with a variety of IP collaboration events

- Roblox regularly collaborates with IPs, typically in 31 day events.
- Roblox had collabs with famous circus Cirque du Soleil, K-pop group BLACKPINK, Japanese game show Takeshi's Castle, and celebrity Paris Hilton in the past few months.
- This wide variety in partnerships shows Roblox's versatility, but the lack of revenue spikes calls the effectiveness of these events into question.
- Out of these, only the BLACKPINK collaboration showed a revenue bump at the beginning of the event.

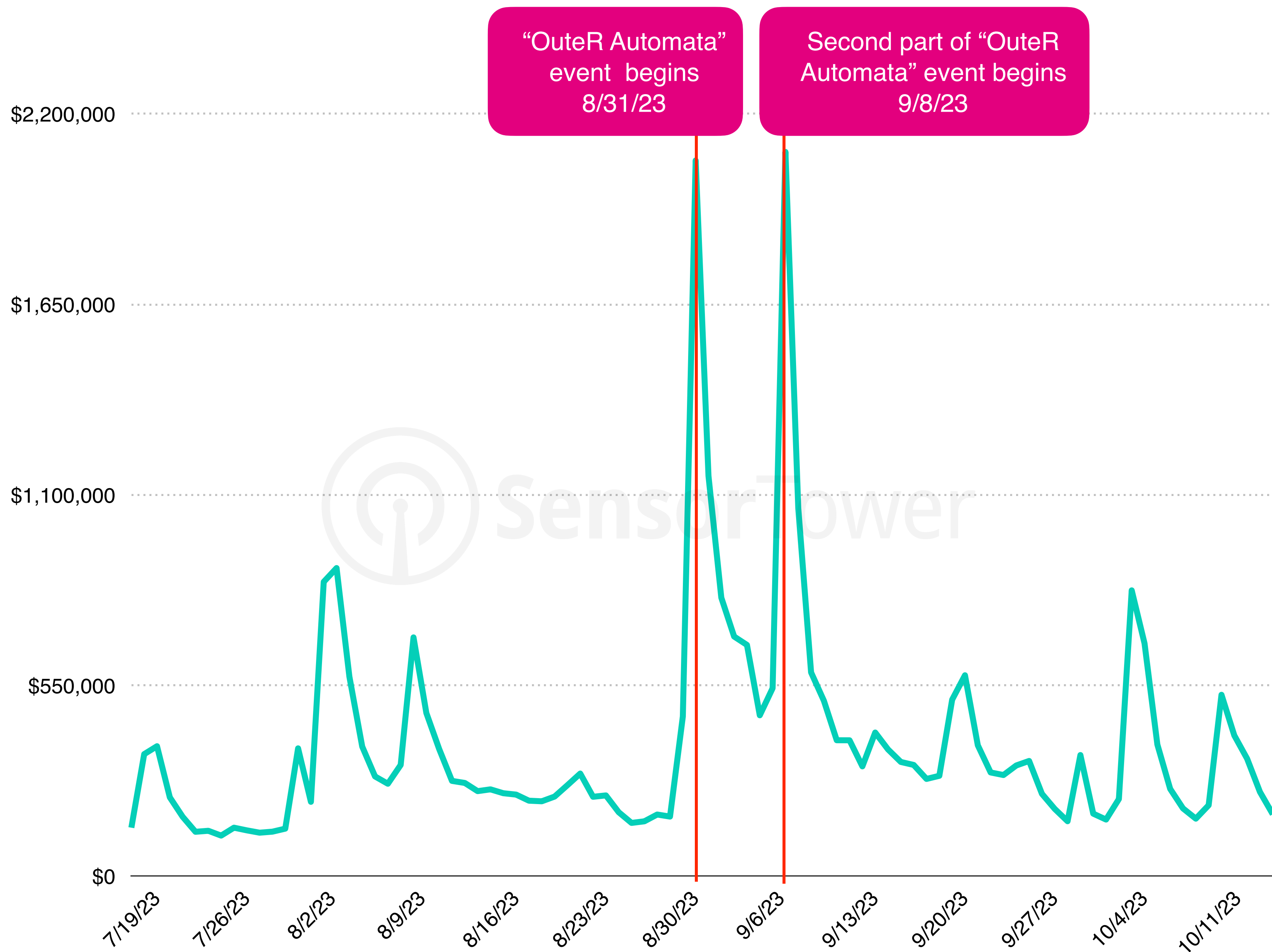
Roblox daily revenue
Worldwide, App Store and Google Play



NieR:Automata collab event drives Goddess of Victory: Nikke revenue

- Tencent mobile RPG Goddess of Victory: Nikke drove a massive spike in revenue by collaborating with a popular Japanese RPG and IP, NieR:Automata.
- Both games have a Sci-fi anime theme with attractive characters, fueling the collaboration’s success. **Synergy between IP and the mobile game for an in-app collaboration event is crucial.**
- The event was divided into two parts, with the beginning of the second part driving more revenue than the beginning of the entire event.

GODDESS OF VICTORY: NIKKE daily revenue
Worldwide, App Store and Google Play



There's huge room for growth in mobile games through cross-platform

- With development for multiple platforms becoming easier, reaching huge new audiences through cross-platform development is a huge opportunity.
- There aren't many IP cross-platform games, but several of them are category defining outliers.

Google Play and the App Store will allow games to be run natively on PC/Mac.

Out of the top 100 mobile games by worldwide unified revenue:

3

have cross-play capabilities

Example: Roblox



3

were released simultaneously on mobile and PC/console

Example: Honkai: Star Rail



3

were ported from PC/console to mobile

Example: Teamfight Tactics



3

were ported from mobile to PC/console

Example: Honor of Kings



3

are extensions of existing brands

Example: Call of Duty: Mobile



Three out of the top five 2023 IP mobile game launches have been Eastern video game IPs

Top 2023 IP mobile game launches
Worldwide, App Store and Google Play

Game	Revenue/ Day	Genre	Publisher	Media Type	Most popular country by revenue
MONOPOLY GO!	\$2,300,000	Casino	Scopely	Board Game	US
Monster Hunter Now	\$200,000	Geolocation	Niantic	Video Game	Japan
Pokemon Sleep	\$90,000	Lifestyle	The Pokemon Company	Anime/Manga	Japan
Tower of God: NEW WORLD	\$70,000	RPG	Netmarble Games Corp	Video Game	South Korea
Street Fighter Duel - Idle RPG	\$65,000	RPG	Sony Corporation	Video Game	US

Key Takeaways

- MONOPOLY GO!, the only western IP in the this list, has far outstripped any other 2023 launch in revenue, IP or not.
- Niantic seems to have another hit on its hands with Monster Hunter Now, after Harry Potter: Wizards Unite shut down and Transformers: Heavy Metal didn't make it out of soft launch
- Japanese video game IPs Street Fighter and Pokemon have broken into genres, RPG and Lifestyle, respectively.
- Korean webtoon IP Tower of God is greatly outperforming the previous Tower of God game, Tower of God: Great Journey.



Several IP games are currently in soft launch or preorder

Media Type

Video Game

Anime

Television

Name	Publisher	Details
Rainbow Mobile Six	Ubisoft	Ubisoft brings the Rainbow Six IP to mobile. Players play unique operators in competitive, multiplayer 5v5 shooter matches, quite similar to Call of Duty: Mobile.
Game of Thrones: Legends	Take-Two Interactive Zynga	After a successful partnership on Game of Thrones slots, Zynga and Warner Bros. have soft launched a Game of Thrones puzzle RPG. Zynga will no doubt take learnings from running Empires & Puzzles.
OCTOPATH TRAVELER: CotC	Excptional Global (NetEase)	Square Enix already released this game in 2022, but it seems that they've partnered with NetEase to soft launch in some southeast Asian countries like Thailand, Singapore, and Indonesia.
MHA: Rise of Heroes	BRIGHTON FRINGE LTD	The hit anime My Hero Academia is getting another mobile game; this time it's an adventure card game. The given publisher name, "Brighton Fringe LTD", does not have another game to its name. Brighton Fringe is an arts festival in England.
EVE Galaxy Conquest	CCP Games	EVE Galaxy Conquest brings the EVE Online universe to mobile for the first time in this 4X game. Instead of flying one ship at a time, players will control entire fleets. CCP Games has also published EVE Portal, a companion app for EVE Online.



Every top PC/Console 2023 launch was an IP game

- The top release of the year was Warner Bros.’ Hogwarts Legacy, a new game from the Harry Potter IP.
- #2 was Call of Duty: Modern Warfare 3 (2023). Call of Duty: Modern Warfare 2 (2022) also continues to be a top 10 seller despite being released in 2022. It is a sequel to the 2019 Modern Warfare reboot, and follows an alternate storyline to the original Call of Duty: Modern Warfare 2.
- Three were sequels (Legend of Zelda: Tears of the Kingdom, Diablo IV, Star Wars: Jedi Survivor, Call of Duty: Modern Warfare 2, Call of Duty: Modern Warfare 3).
- Two were annual installments of a franchise (Madden NFL 24, EA Sports FC 24).
- Three were remakes of an older game (Call of Duty: Modern Warfare 3, Call of Duty: Modern Warfare 2, Mortal Kombat 1).

Top selling PC/Console games of 2023
Source: Circana

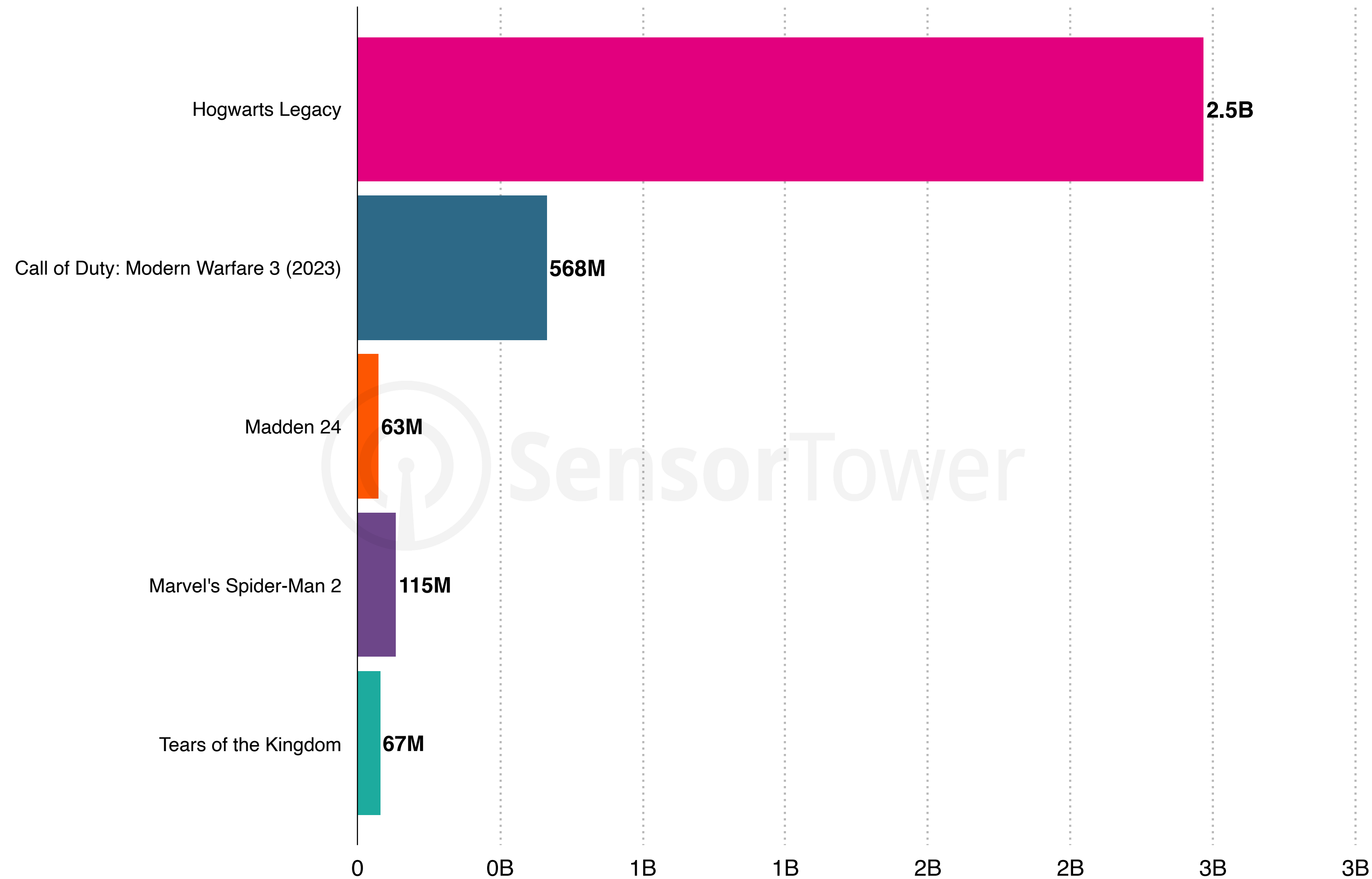
Rank	Game	Publisher	Genre
1	Hogwarts Legacy	Warner Bros. Games	Action RPG
2	Call of Duty: Modern Warfare 3 (2023)	Activision Blizzard	Shooter
3	Madden NFL 24	Electronic Arts	Sports
4	Marvel’s Spider-Man 2	Sony Interactive Entertainment	Action Adventure
5	Legend of Zelda: Tears of the Kingdom	Nintendo	Action Adventure
6	Diablo 4	Activision Blizzard	Action RPG
7	Call of Duty: Modern Warfare 2 (2022)	Activision Blizzard	Shooter
8	Mortal Kombat 1	Warner Bros. Games	Fighting
9	Star Wars Jedi: Survivor	Electronic Arts	Action Adventure
10	EA Sports FC 24	Electronic Arts	Sports



Hogwarts Legacy had by far the most US ad impressions out of 2023 launches

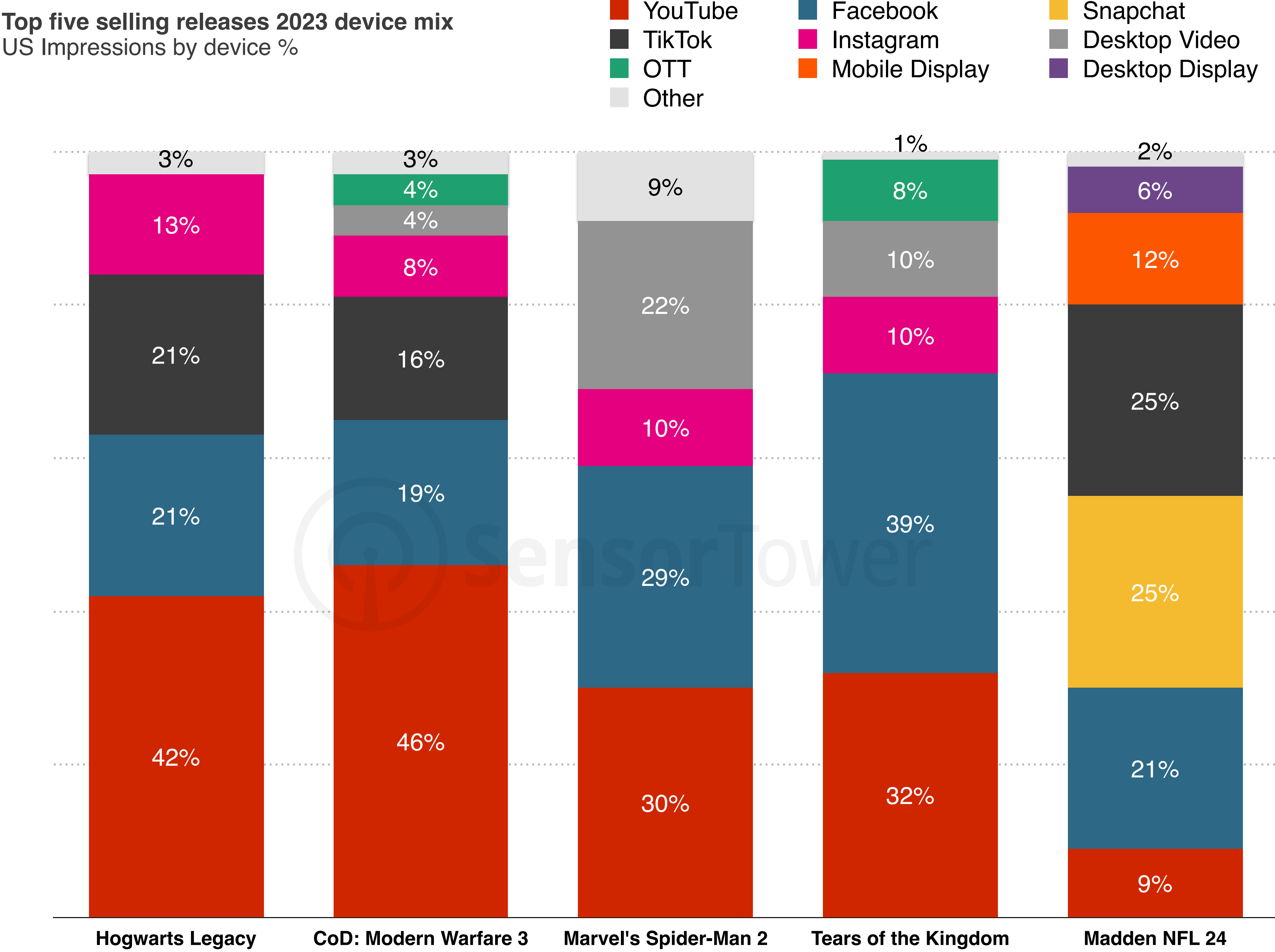
- Hogwarts Legacy, an original game with the top tier Harry Potter IP, had more impressions than the other top five selling PC/Console games combined.
- IP franchises with regular releases (Legend of Zelda, Madden) achieved excellent sales results without significant impressions.
- Marvel’s Spider-Man 2 also achieved impressive results with a much smaller launch than the top 2 games. The original Marvel’s Spider-Man performed superbly and was received exceedingly well by the community. It seems likely that this existing audience was excited for a sequel.
- Remake Call of Duty: Modern Warfare 3 had a significant launch campaign that drove it to a solid #2 best-selling game of 2023.
- Madden 24’s launch had very little in the way of ad impressions. It’s likely they reached their audience through other channels directly affiliated with the NFL and NFL teams.

Top 2023 PC/Console launches ad impressions
US Impressions 14 days before and after launch, including launch day



YouTube the top channel for PC/Console games

- YouTube and Facebook were the most commonly utilized channels by impressions.
- Hogwarts Legacy, by far the largest launch campaign this year, used YouTube, Facebook, TikTok, and Instagram.
- Madden 24 ran the most unique launch campaign, leaning heavily into TikTok and Snapchat over YouTube and Facebook. Madden 24 was also the only launch to use Desktop and Mobile Display ads to a significant degree (>5%).
- TikTok was utilized by Hogwarts Legacy, CoD: MW 3, and Madden 24.
- Instagram
 - made up around 10% of each launch’s impressions with the exception of Madden 24, which didn’t use the device at all.
- Marvel’s Spider-Man 2 and The Legend of Zelda: Tears of the Kingdom used Desktop Video during their launches.
- Tears of the Kingdom and CoD: MW 3 dipped into OTT.



Many Hogwarts Legacy creative were PlayStation branded

- Hogwarts Legacy was also available on PC and Xbox Series X, but was exclusively PlayStation branded in ads.
- Hogwarts creative outros often included a pre-order call to action, followed by more PlayStation branding.
- Second intro screen often included a callout to the PlayStation exclusive quest. Making some of the content PlayStation exclusive was a controversial decision that made some PC and Xbox players unhappy.

Example YouTube Intro for Hogwarts Legacy Ads Accompanied by PlayStation “tone” audio



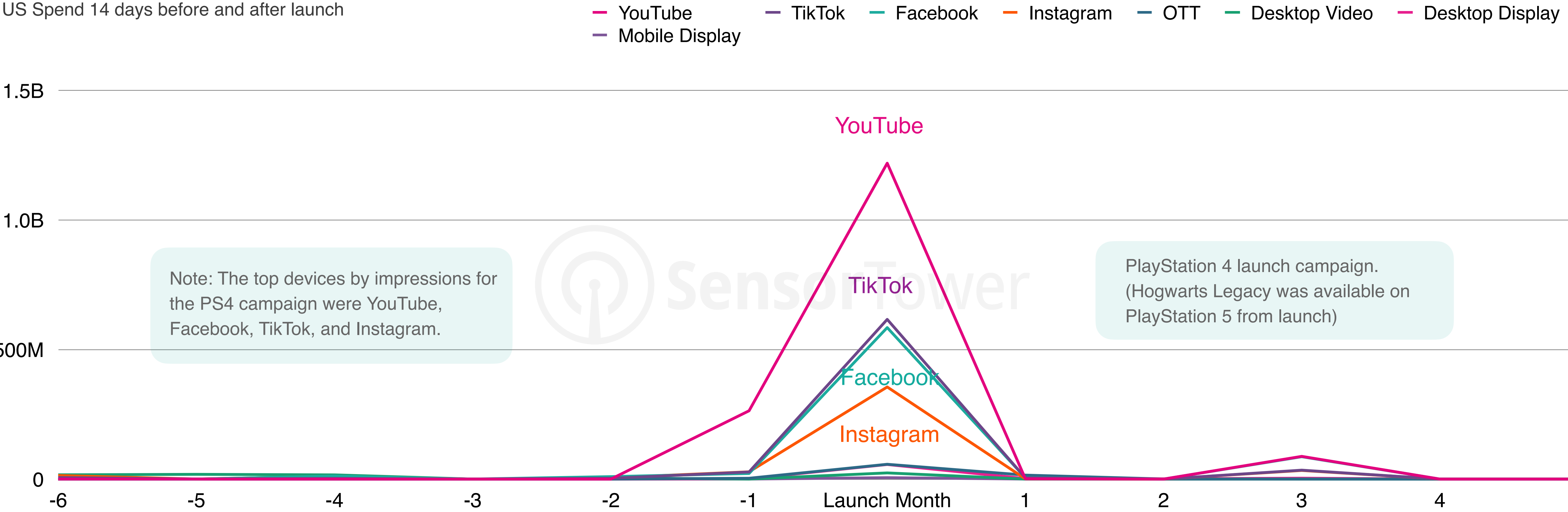
Example YouTube Outro for Hogwarts Legacy Ads



Hogwarts Legacy focused on launch month, with a secondary campaign for PS4 launch

Ramp up started two months before launch. PS4 branding was originally included in early creative, but was not seen in ads as launch date approached, as the PS4 and Xbox One versions were delayed after the PS5/PC/Xbox Series X launch. Snapchat was not used significantly. The channel was tested once three months before launch and twice in launch month but not scaled.

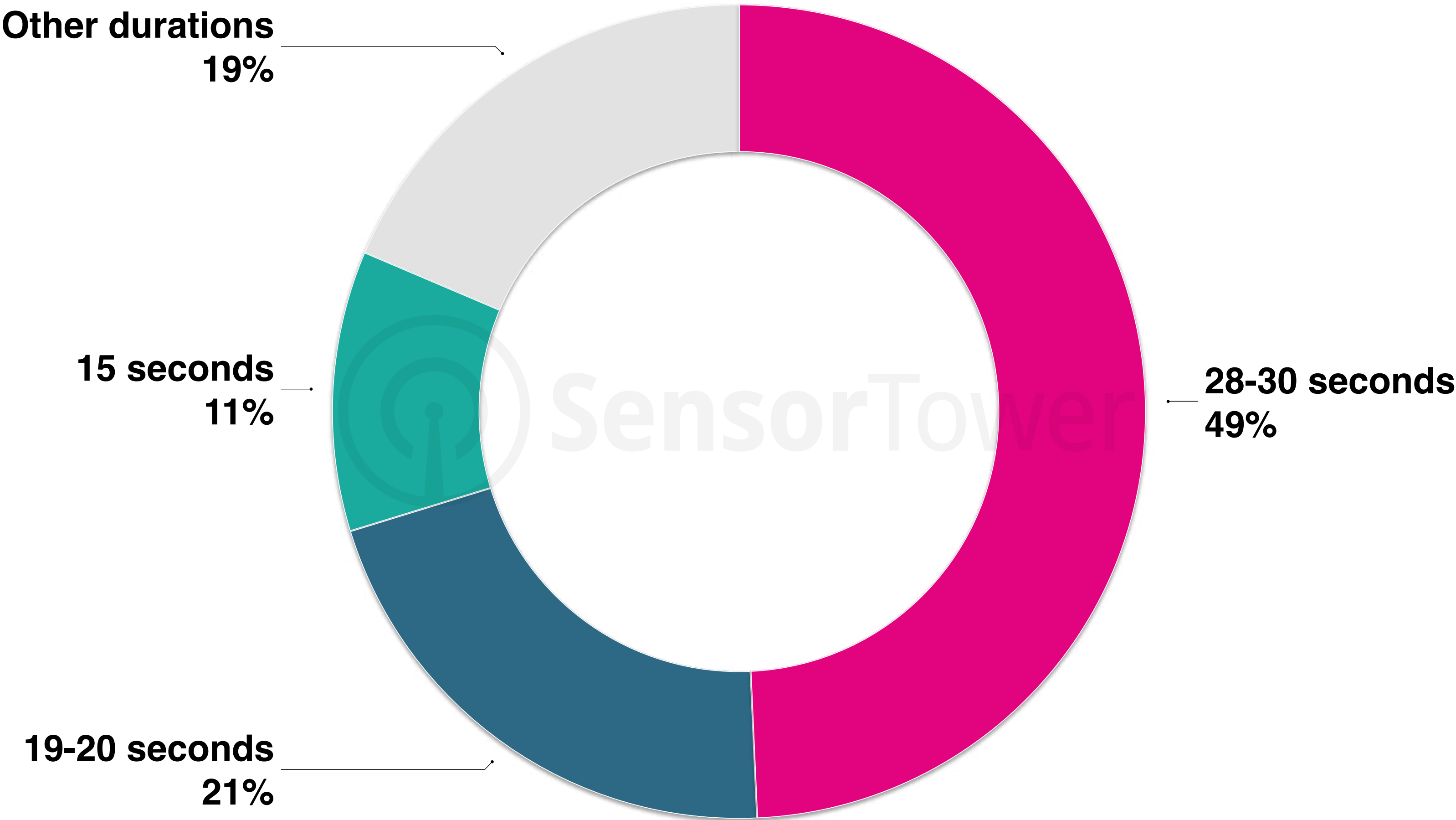
Top 2023 Launches by Sales (Circana)
US Spend 14 days before and after launch



Half of Hogwarts Legacy YouTube ad spend was directed towards creative around 30 seconds long

- The next most common Hogwarts Legacy YouTube ads were around 20 seconds long, followed by 15 second long ads.
- Nearly 20% of spend were on “other durations”.
- Hogwarts Legacy’s focus on 30 second YouTube ads stands in contrast to the other top 5 launches, which focused more on 15 second ads. Star Wars: Jedi Survivor uniquely invested significantly in 6 second ads.
- It seems 15 - 30 second YouTube ads are a sweet spot of short and punchy while still allowing messaging to come across for PC/Console games.

Hogwarts Legacy YouTube spend by video length
January and February 2023
Hogwarts Legacy launched February 10, 2023



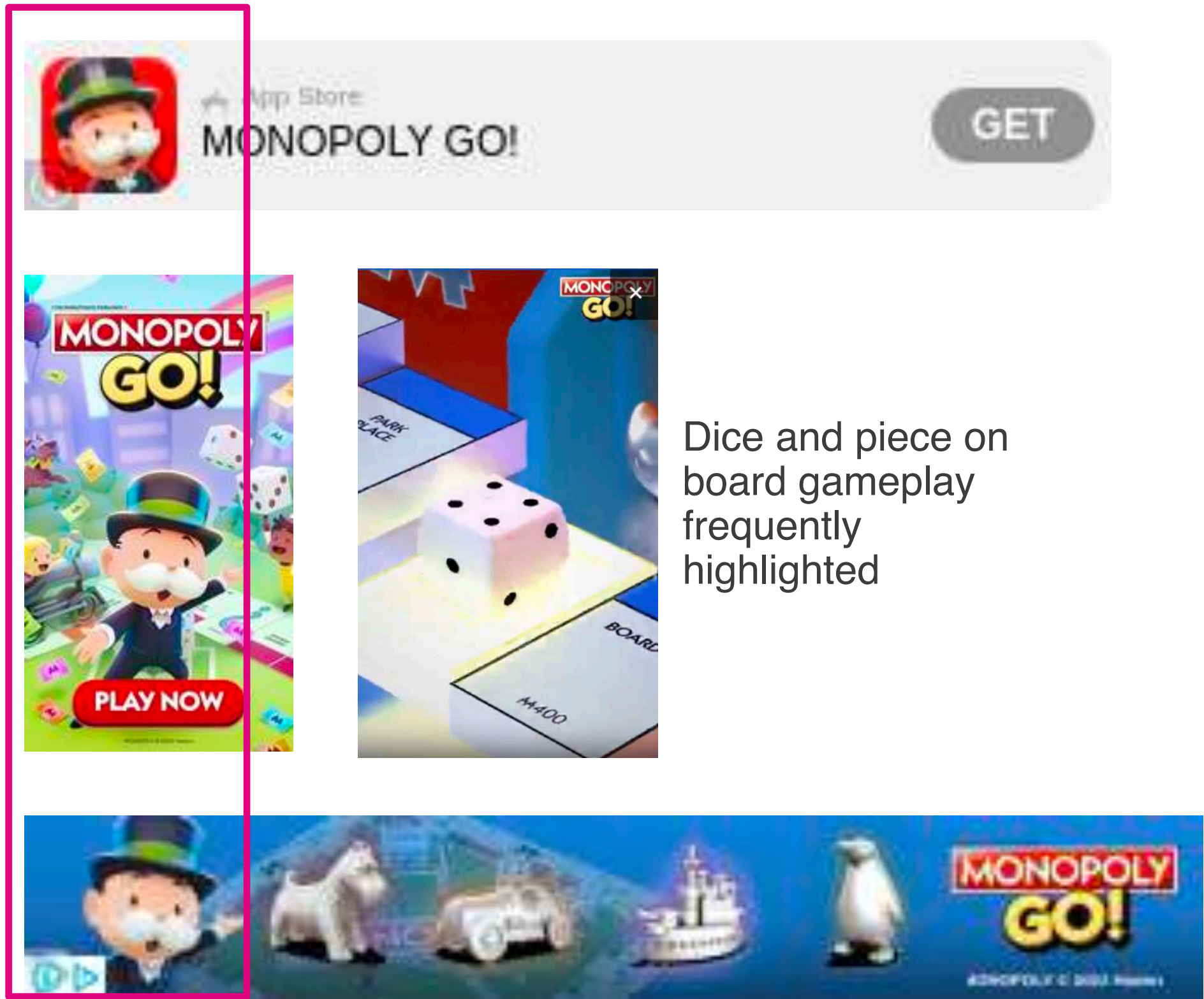
MONOPOLY GO! combined the broad appeal of the Monopoly IP with proven casino mechanics and monetization to drive \$1 billion less than 7 months after launch.

MONOPOLY GO! uses globally recognizable IP elements of the classic board game in creative to drive downloads.

MONOPOLY GO! took inspiration from Casino games like Coin Master and Board Kings that have proven core loops and monetization.

Top MONOPOLY GO! creatives December 2023

“Mr. Monopoly”, beloved and instantly recognizable Monopoly character



Dice and piece on board gameplay frequently highlighted

Screenshot from Coin Master



Screenshot from Board Kings

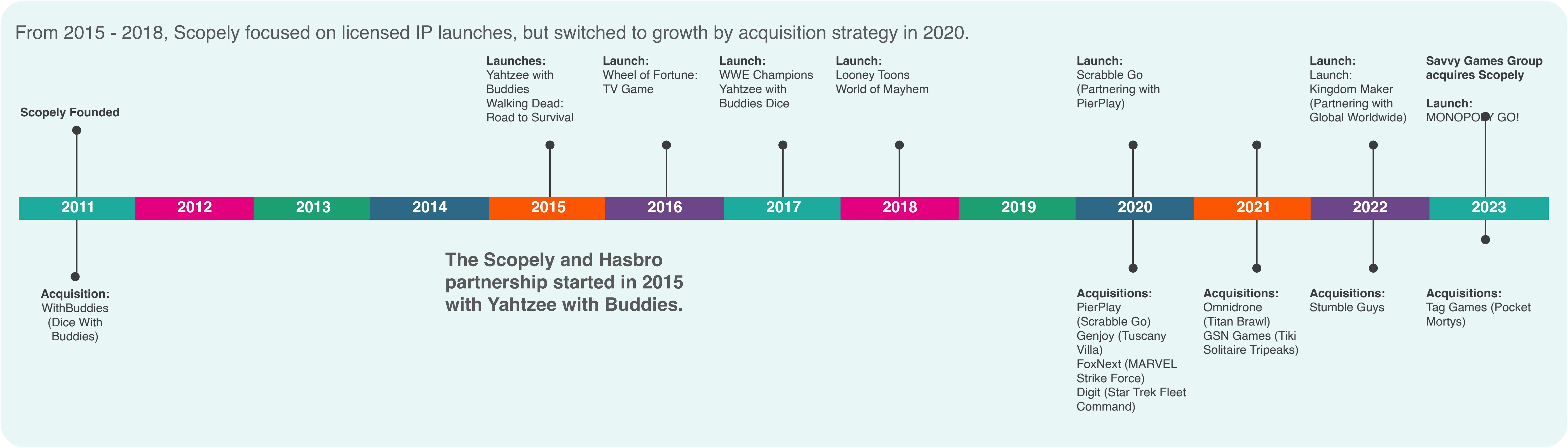


Successful IP partnerships can take time to cultivate

Scopely and Hasbro partnered for years before MONOPOLY GO!. Over this time, Scopely presumably came to deeply understand Hasbro IPs and Hasbro gained a deeper understanding of the mobile game market and Scopely’s capabilities as a publisher.

Scopely publishes games for several IPs, including Marvel, Star Trek, Walking Dead, and more. Scopely was acquired by Savvy Games in 2023, just a few months after the launch of MONOPOLY GO!.

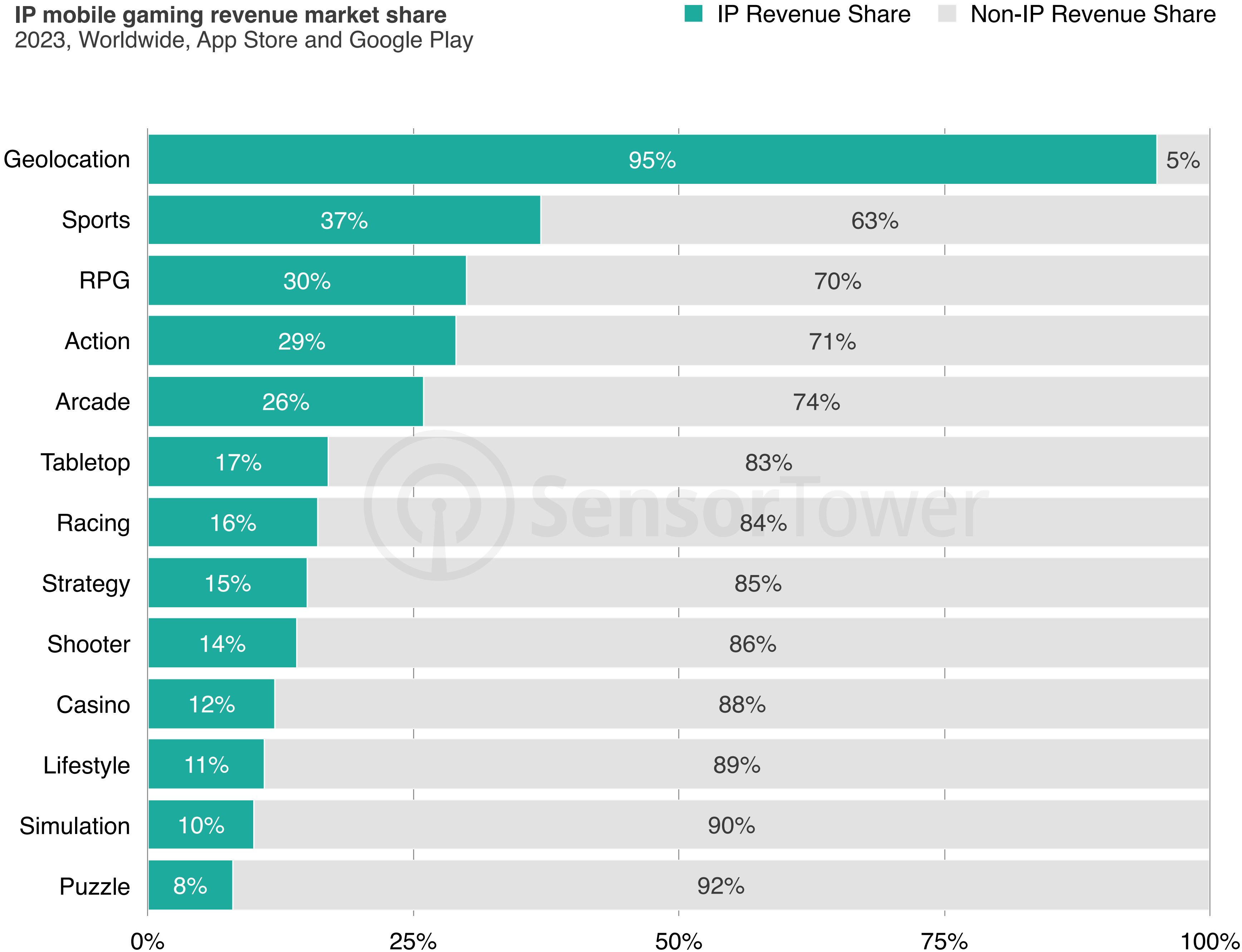
Timeline of selected Scopely launches and M&A events with highlighted games



IP mobile game market is far from saturated

- Most genres' revenue IP market share is less than 20%.
- Niantic dominates the Geolocation genre with Pokemon Go and their new launch Monster Hunter Now.
- Sports also have significant IP revenue market share from league supported games; IP market share was even higher before EA and FIFA ended their partnership.
- RPG IP revenue is driven by games like Fate: Grand Order and Uma Musume. Non-IP revenue comes from games like Honkai: Star Rail and Monster Strike.
- Top IP Action games include DRAGON BALL LEGENDS, ONE PIECE Bounty Rush, and Marvel Contest of Champions.
- Casino IP revenue is driven almost solely by MONOPOLY GO!.
- Puzzle, Simulation, and Lifestyle have the least IP revenue share, suggesting that there may be room for IP game growth in these casual genres.

IP mobile gaming revenue market share
2023, Worldwide, App Store and Google Play



Summary



MONOPOLY GO! propelled Scopely and Hasbro to the top in 2023.

This new mega-hit fixed Scopely as the top IP mobile games publisher and Hasbro as the top IP mobile games corporate parent. The Monopoly IP’s global appeal and proven casino mechanics and monetization made for an explosive combination.



The IP opportunity in mobile gaming is just beginning.

In a market where games with broad appeal are beating out games that need to find niche audiences, IP is one way to get attention and drive installs. Most genres are far from saturated with IP, and innovative combinations like MONOPOLY GO!’s board game + casino are surely waiting to be discovered.



IP based PC/Console series reach huge audiences with less spending.

Hogwarts Legacy is the top game by sales in 2023, but installments in series like The Legend of Zelda: Tears of the Kingdom and Madden 24 spent a fraction of Hogwarts Legacy’s budget to become some of the best-selling titles of the year in a year filled with hits.



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Pathmatics Custom
—

Develop winning user acquisition campaigns with insight into creatives achieving majority SOV.

Pathmatics RMI
—

Benchmark app usage and engagement and understand demographics of your users.



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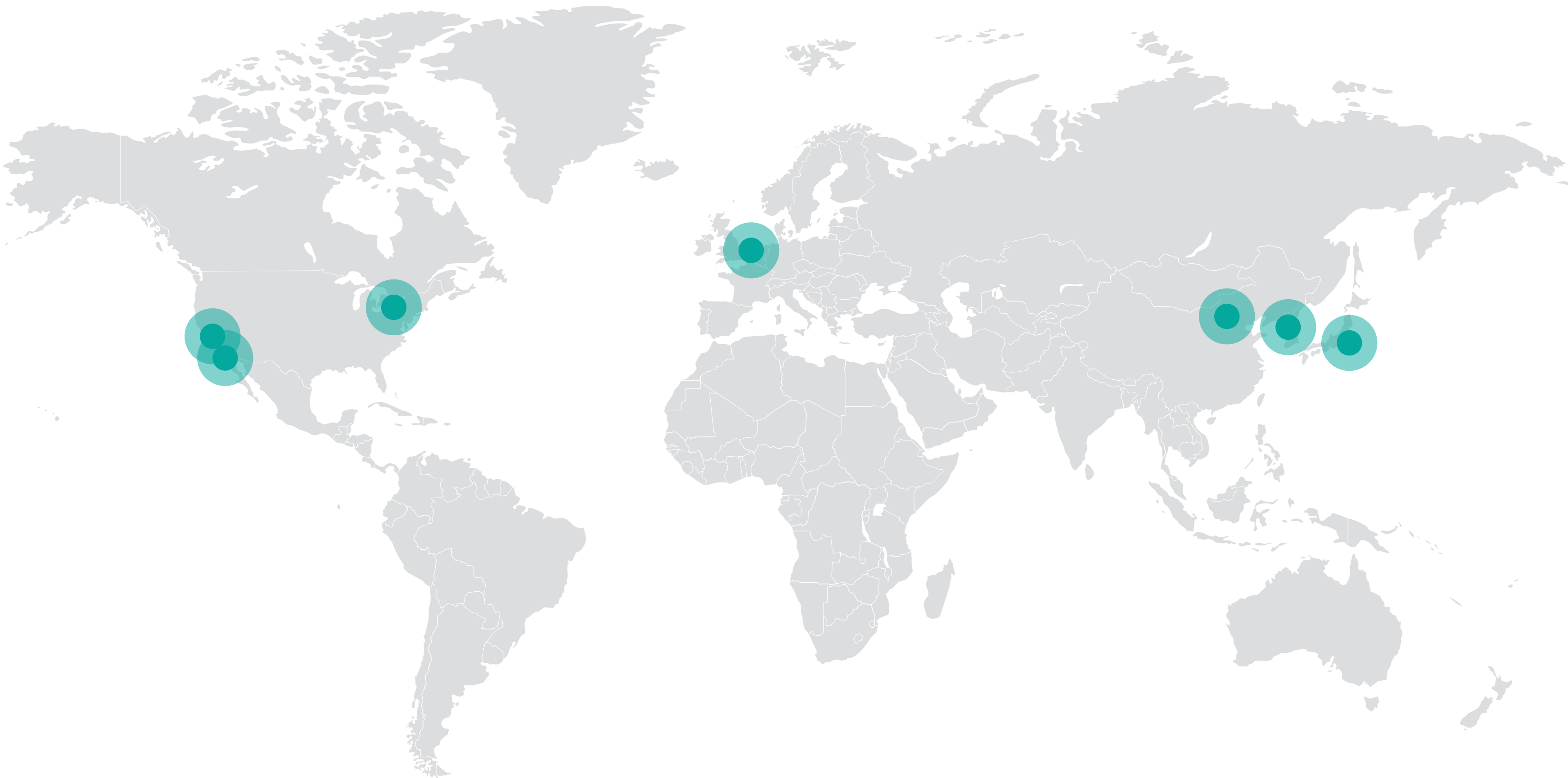
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