



November 2023

How IP and brand collaborations level up games

Industry insights powered by Newzoo data



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Introduction

Publishers are always looking for new ways to expand the reach of their live-service games. IP and brand collaborations can be a real game changer. Releasing limited branded cosmetics items and partnering with brands and IP holders is now a proven strategy for boosting engagement and revenue.

Leveraging brand and IP partnerships in games to create exciting new content can attract players and delight them with items from their favorite intellectual properties. At the same time, **gaming is entertainment's latest stage for spotlighting brands and franchises.**

Ticking off those brand awareness and affection KPIs—as well as helping brands and IP holders target valuable audience segments—has never been easier. Just look at what Fortnite and ROBLOX are doing for a taste of how gaming can bring highly engaged eyes to brands.

To uncover this exciting strategy, we made this report analyzing the impact of brand and IP collaborations in games. We cover over 470 IP and brand collaborations from January 2021 to June 2023, **exploring how these collaborations boost player engagement and shape strategies for pay-to-play and free-to-play games.** We also investigate several case studies, including Dead by Deadlight and Top Gun: Maverick.

We hope you enjoy reading this report as much as we loved producing it. **Please [get in touch](#) to dive deeper into [essential trends](#) currently shaping the games market.** Happy reading!



Tianyi Gu

Senior Market Analyst



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Key takeaways



+11%

Average DAU increase for a game over an IP/brand collaboration's first 7 days.



+19%

Average DAU increase for premium games.



158 out of **477**

The highest number of collaborations were between game IPs.

Source: ©Newzoo | Newzoo Game Performance Monitor | 37 markets included (AE, AR, AT, AU, BE, BR, CA, CH, CL, CO, CZ, DE, DK, ES, FI, FR, GB, HU, ID, IE, IL, IT, JP, KR, MX, NL, NO, NZ, PL, PT, RU, SA, SE, TH, TR, US, ZA)

Methodology & terminology

Methodology

IP and brand collaborations

We define IP and brand collaborations as cases where a game incorporates content from partnered IP holders and brands. These can include skins, characters, items, maps, stories, game mechanics, and game modes. The scope of this report excludes collaborations outside of games, such as physical merchandise.

For this report, we researched 477 collaborations between January 2021 and June 2023 across 104 unique PC/console games and 352 unique IPs and brands. Browser games were excluded from the scope.

The analysis

Newzoo's [Game Performance Monitor](#) lets us analyze how collaborations impact engagement metrics, such as MAU, WAU, DAU, lifetime players, and average playtime for PC and console games. The DAU data scope includes games on PC (Steam), PlayStation, and Xbox, excluding games on non-Steam launchers or Nintendo Switch.

For the performance analysis, we analyzed average DAU and average playtime growth by comparing the first seven days of the collaboration (release week) versus the seven days before a release (pre-release week).

Games had to meet a bigger sample size limit at least once in their history on any platform to show up in the dataset, ensuring DAU data consistency. To isolate the effect of collaborations from other contributing factors, we excluded collaborations that launched simultaneously with a game's release (including a next-gen update), shifts from pay-to-play to free-to-play, and additions to multi-game subscription services like PlayStation Plus or Game Pass. Therefore, the aggregate analysis using DAU covers 369 collaboration cases.

Terminology

MAU (Monthly Active Users) Players who opened the title at least once in the selected calendar month.

WAU (Weekly Active Users) Players who opened the title at least once in the selected calendar week.

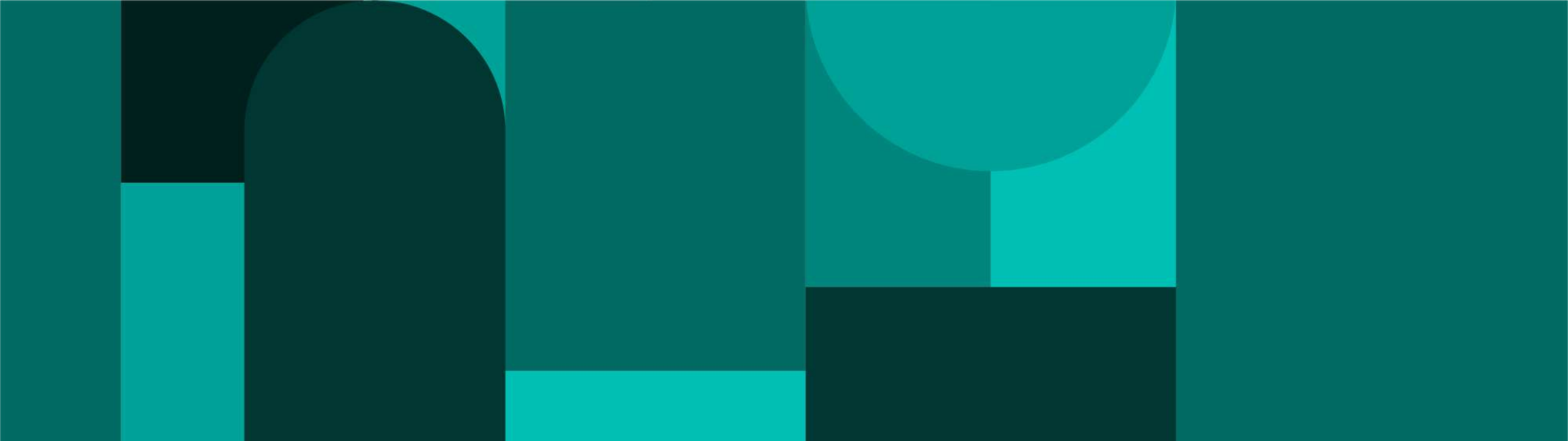
DAU (Daily Active Users) Players who opened the title at least once on the selected calendar day.

Lifetime players Total unique players who have ever played a title until the selected calendar month. Note: This does not include players on PlayStation 3, Xbox 360, or anything prior. New and lifetime players are determined by platform (e.g., PlayStation), not by device (e.g., PlayStation 5).

Average playtime Average amount of time that active players spent in having the title up and running for the selected period.

Release week First seven days from the day when a collaboration was released.

Pre-release week Seven days before a collaboration was released.



Overview

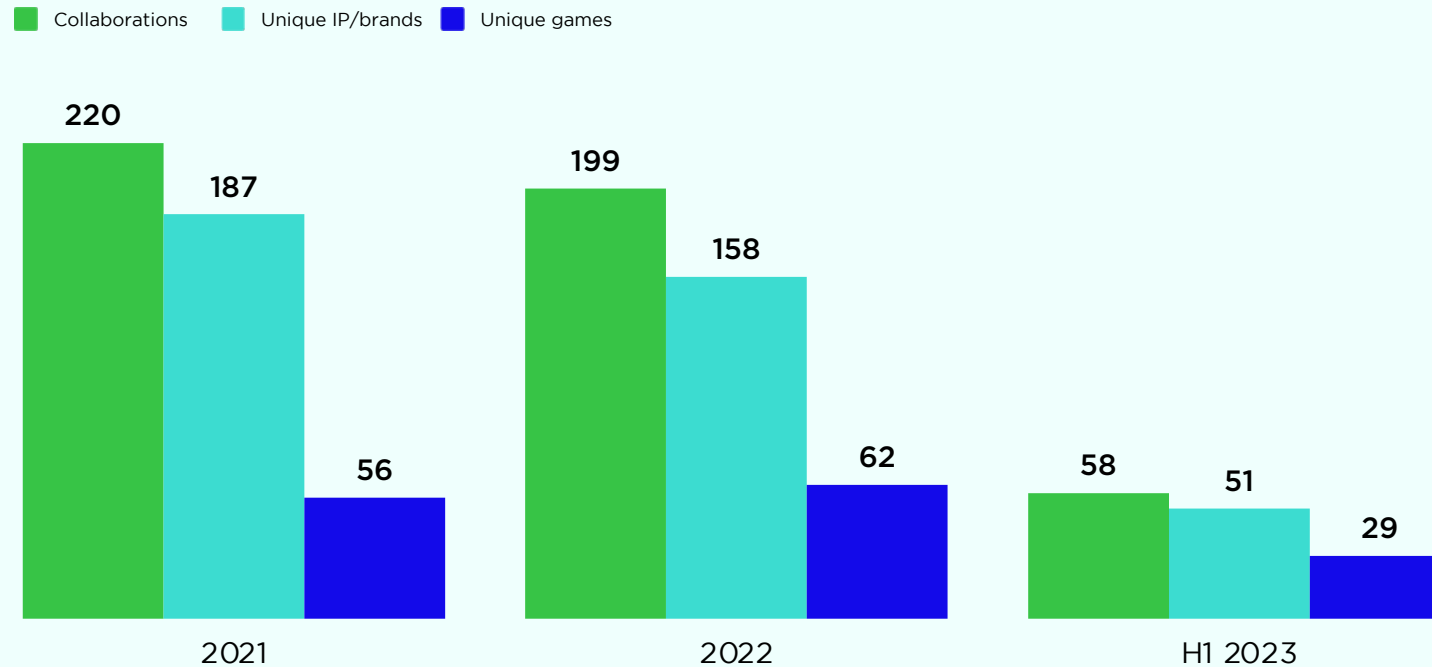
How PC and console games collaborate with brands and IP holders

Game makers frequently leverage IP/brand collaboration events

Despite fewer collaborations hitting the games market from 2021 through H1 2023, the strategy remains quite valuable

Number of collaborations, unique IP/brands, unique games

PC & console | 2021, 2022, H1 2023



From 2021 until June 2023, PC and console game makers collaborated less with brands and IP holders than in the past, mirroring broader market trends in a post-lockdown age.

Gaming activity surged in 2020 and 2021 as the world went into lockdown. Many publishers scaled up, while marketers diverted their budgets to gaming as traditional marketing avenues ran dry. Investors, meanwhile, grew excited about the metaverse.

However, momentum in gaming activity and metaverse hype slowed down in 2022 and 2023 due to constrained budgets and layoffs (as publishers scaled back down). These constraints led to fewer collaborations and events in these years. Meanwhile, the world opened once more, meaning marketers could again allocate their budgets across other media.

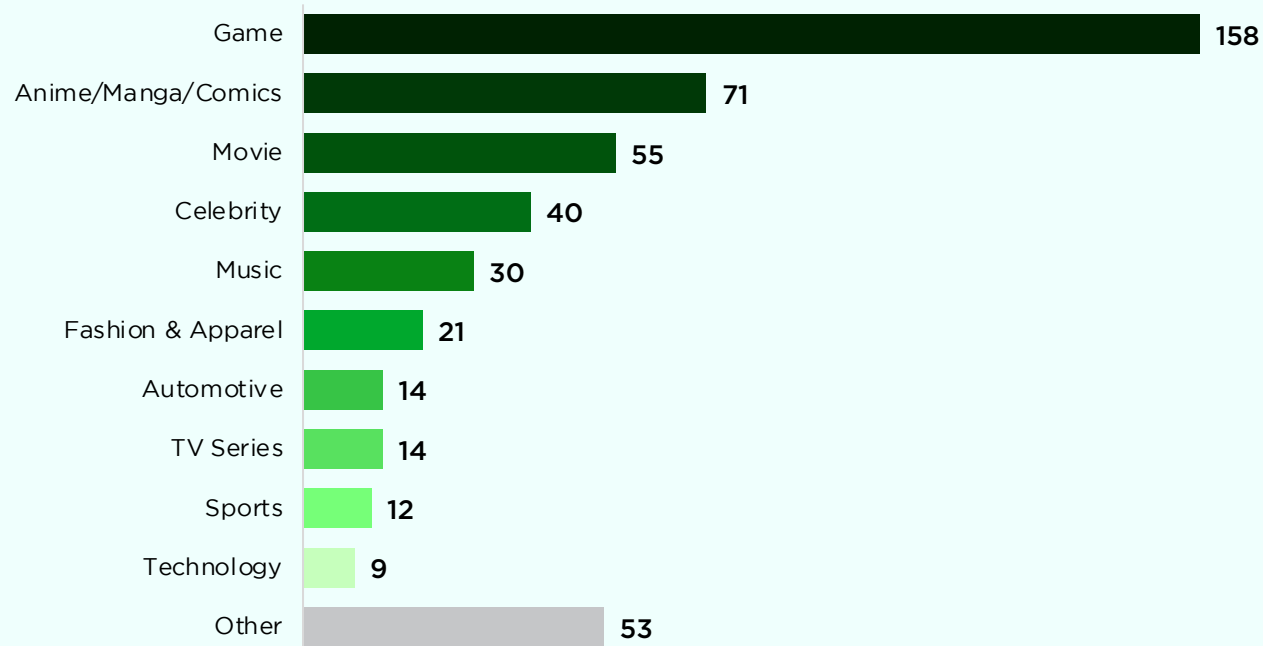
The decline in collaboration numbers doesn't negate IP and brand partnerships' proven ability to boost player engagement and revenue in PC and console games. As more game franchises shift to live-service models, more collaboration opportunities will likely arise.

The most common type of collaboration is between game IPs

Anime/Manga/Comics account for the second-highest number of IP and brand collaborations

Number of collaborations by IP/brand origin

PC & console | 2021, 2022, H1 2023



Looking further into the 477 collaborations we analyzed for this report, we see that **the most common type of collaboration is between two game IPs. Anime, manga, and comic IP** collaborations are also relatively common.

These collaborations boost a game's engagement and revenue. They also help to increase the partnered brand or IP holder's reach and appeal (especially among a new audience).

As more media goes digital, including anime, manga, and comics, it will become easier to facilitate IP and brand collaborations. This will make it more cost-effective to create in-game content and branded assets.

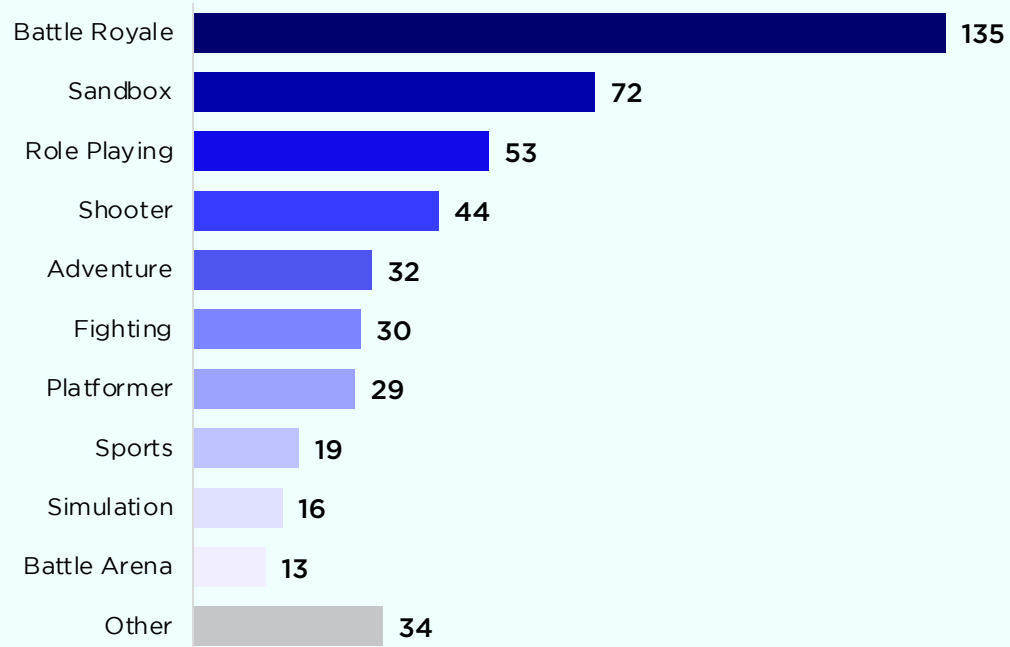
Game IPs like **League of Legends**, **Street Fighter**, and **Among Us** or anime and comics franchises like **Marvel**, **Attack on Titan**, and **DC Comics** are among the most active collaborators with PC and console games.

Battle Royale is the most common genre for collaborations

Fortnite is a clear example of how IP and brand collaborations sustain game ecosystems

Number of collaborations by game genre

PC & console | 2021, 2022, H1 2023

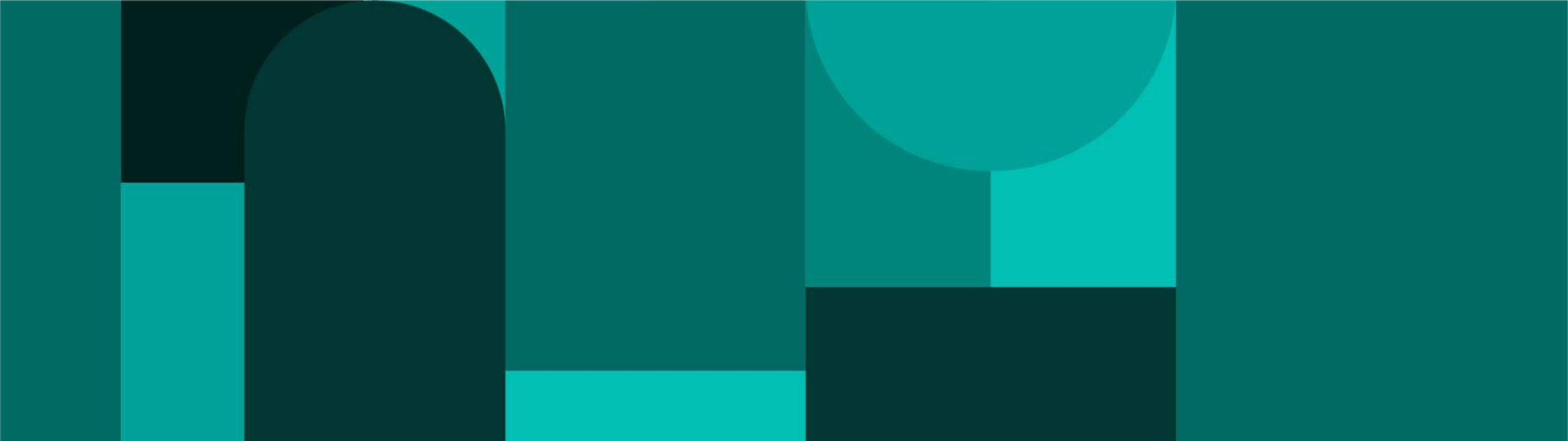


Looking at game genres, the **Battle Royale** genre is the clear leader (thanks mainly to **Fortnite**). Fortnite's Battle Royale frequently features brand activations from the latest TV shows, movies, and other popular properties, like Star Wars and Dragon Ball Z. Brands like the NBA and Ferrari have also been experimenting.

Fortnite Creative has been an outlet for brands via user-generated content (UGC). Anybody can create content for Fortnite Creative, including brands like Coachella and 7-Eleven.

ROBLOX is perhaps the most prominent UGC platform in the games market, and brands are also extremely active there. This is why **Sandbox** has the second most collaborations in this ranking.

Role-playing games are the #3 genre. This is in no small part thanks to miHoYo's **Genshin Impact**, which has seen collaboration events across automotive (Cadillac), consumer electronics (Samsung), and the food industry (Domino's).



Impact on game engagement

How IP and brand collaborations boost engagement for games

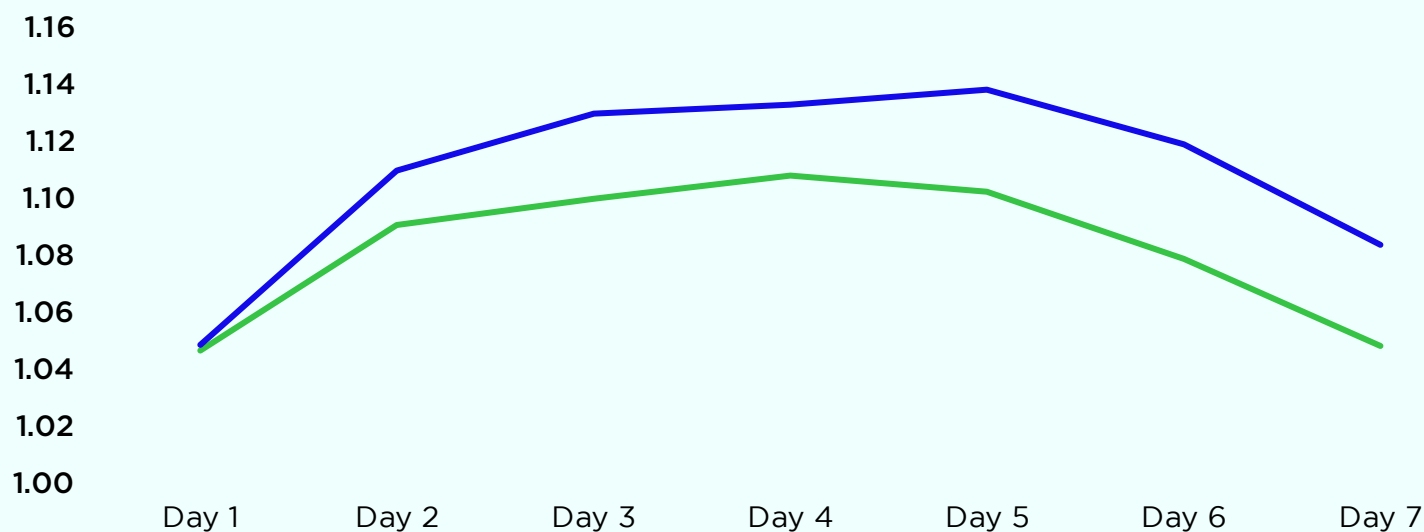
IP and brand collaborations boost game DAU by +11%

Daily active users (DAUs) peak on average between Day 4 and Day 5 following a collaboration's launch

Collaboration performance index

PC (Steam), PlayStation, & Xbox | 37 major markets | Jan 2021 – Jun 2023

- DAU compared to avg. DAU for pre-release week (past seven days before collaboration releases)
- DAU compared to avg. DAU for past 12 months before collaboration releases



+11%

IP and brand collaborations positively impact game engagement in the short term. Over the past several years, IP and brand collaborations boosted DAU by an average of +11% in the first seven days following a launch.

Multiple factors can impact how effective IP or brand collaborations are for games and partnered companies. Brand fit and event timing are both important to consider, while it's also essential to align whether the collaboration fits with a free-to-play or premium strategy.

On average, **DAU peaks between the fourth and the fifth days of the event** then slowly returns to pre-collab levels. Most events covered in this research started on either **Tuesday or Thursday** (over 43% combined).

Curious about the longer-term effects of IP/brand collaborations?

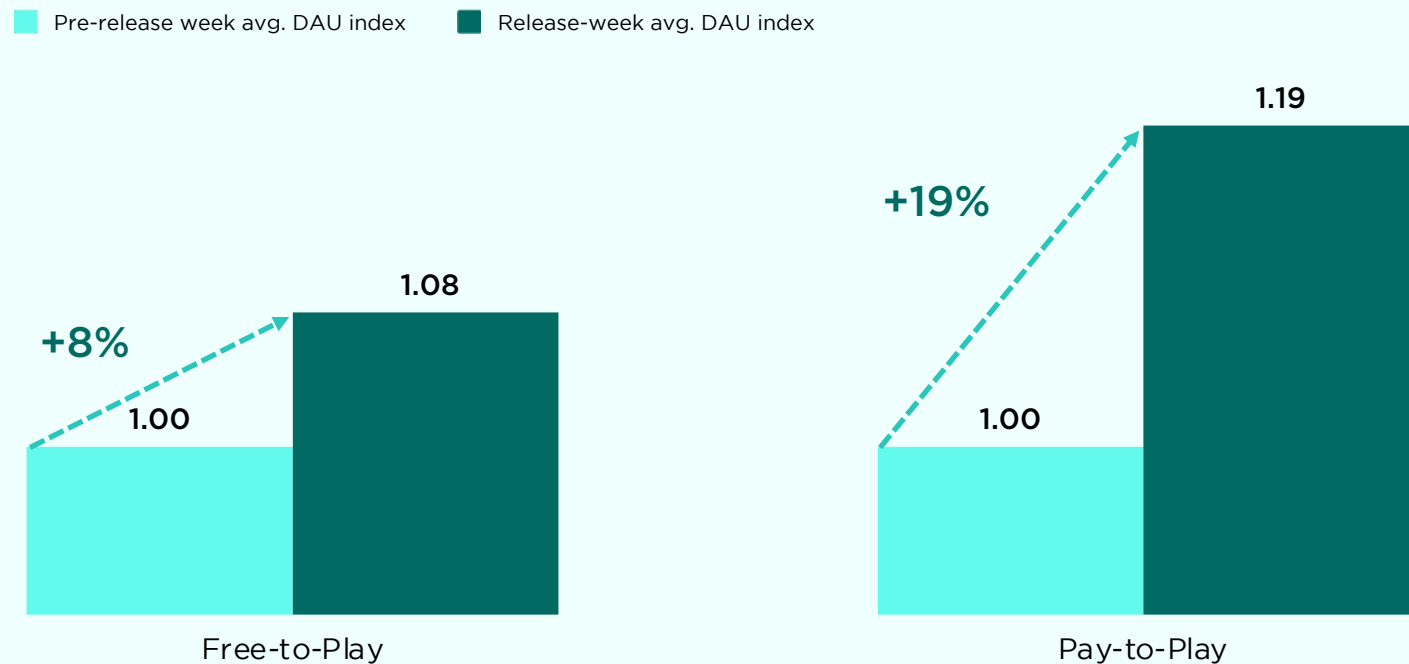
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Premium games get a bigger boost in engagement from collaborations

Premium games commonly use DLC strategies while F2P games often feature branded skins

Release-week DAU boost in free-to-play & pay-to-play games

PC (Steam), PlayStation, & Xbox | 37 major markets | Jan 2021 – Jun 2023

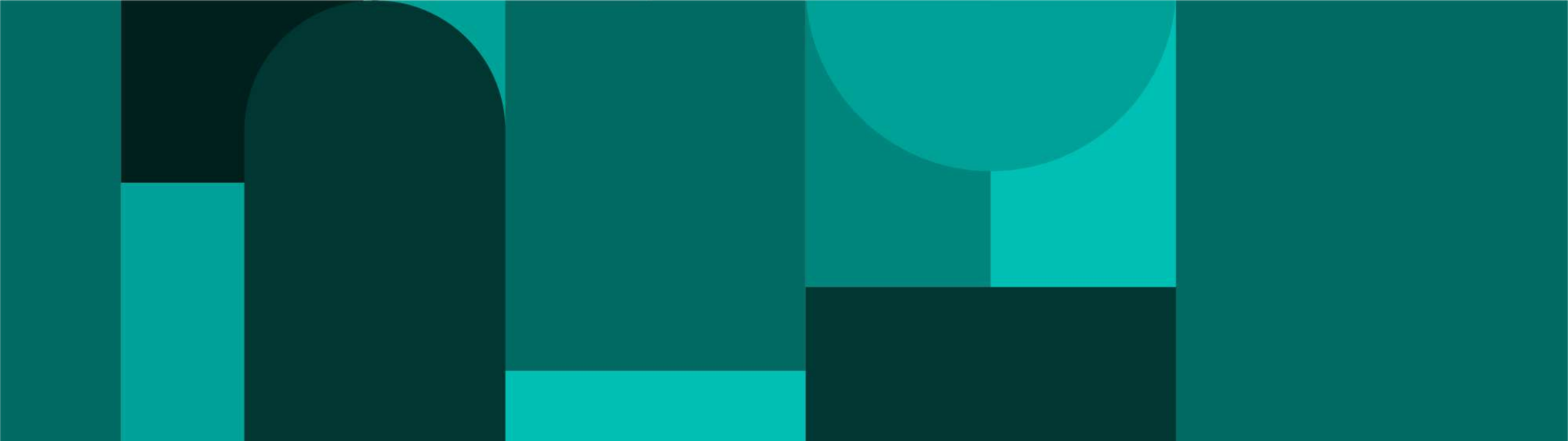


The impact of IP and brand collaborations varies by the type of game in question, especially as game makers adopt different tactics when forging collaborations for free-to-play and pay-to-play games.

Looking at 273 collaborations in free-to-play titles and 96 in pay-to-play games, we find that premium games enjoy more significant engagement boosts. Collaborations boost premium game engagement by **+19%** following the launch of a collaboration. In contrast, free-to-play games experience a lower **+8%** DAU increase in the same timeframe.

Premium games often utilize downloadable content (**DLC**) to leverage IP and brand collaborations. DLC strategies have the potential to raise engagement by attracting new players with fresh content and returning players looking to experience games through new lenses.

In contrast, many collaborations in free-to-play games focus on **in-game skins**, a cost-effective strategy to maintain player engagement. Naturally, cosmetics boost engagement to a lesser degree compared to DLC.



Case studies

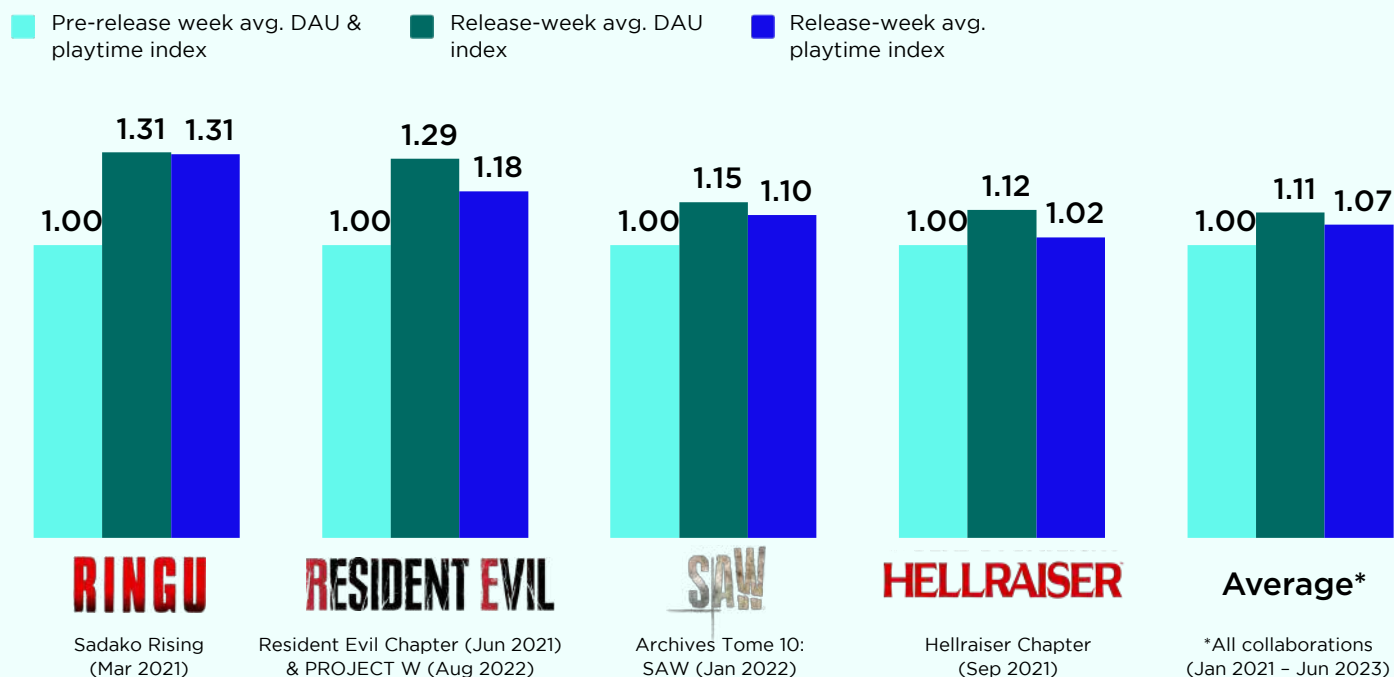
Success factors of IP/brand collaborations in PC and console games

IP fit with games is an important driver for a successful collaboration

Dead by Daylight's crossovers with iconic horror IP successfully boosted DAU and playtime

Collaboration performance index by IP

PC (Steam), PlayStation, & Xbox | 37 major markets | Jan 2021 – Jun 2023



Since its 2016 release, **Dead by Daylight** has become known for its crossovers with iconic horror IPs. The survival horror game has maintained a constant stream of skins and characters, maps, game mechanics, and stories to keep users hooked.

For example, **two new chapters (DLC) from Resident Evil and the film Ringu boosted the release-week average DAU by +31% and +29%**, respectively. These effects exceeded the average effect (+11%) of all the collaborations within the game released between January 2021 and June 2023. The success of these collaborations has set a precedent and generated anticipation among fans for future collaborations.

Of course, these collaborations benefited from other factors, such as discounts for the base game and a large amount of added content.

Nevertheless, **collaborating with an IP that appeals to a similar fan base proves to be an effective strategy for a game**, attracting fans who may not have found the game otherwise. Games present a novel way for enthusiasts of a non-game IP to engage with stories and worlds that they're familiar with but through a new, more playful dimension.

Launching collabs with other marketing activities is a win-win strategy

IP and brand collaborations create hype among fans of the game and the IP and/or brand



Game: Ace Combat 7
Genre: Shooter
Subgenre: Vehicular Combat
Collab IP: Top Gun: Maverick
Collaboration release date: May 26th, 2022

+120%

Avg. DAU increase
in release week

Description:

This special content, in collaboration with Top Gun: Maverick, became available via paid DLC. The DLC, priced at \$19.99, adds six aircraft (including their skins), emblems, nicknames, and additional music tracks, most of which are featured in the movie.



Game: Microsoft Flight Simulator
Genre: Simulation
Subgenre: Vehicle Simulator
Collab IP: Top Gun: Maverick
Collaboration release date: May 25th, 2022

+81%

Avg. DAU increase
in release week

Description:

This Top Gun: Maverick content became available via a free expansion in Microsoft Flight Simulator. The expansion includes a new aircraft, livery, as well as new challenges and missions.

The collaborations between Top Gun: Maverick and two games, Ace Combat 7 and Microsoft Flight Simulator, significantly boosted the games' DAUs.

Timed with the movie's release, both collaborations introduced new content to the games. They captured **the excitement of the Top Gun franchise, which fit both games' aviation-focused gameplay.**

By **launching these collaborations alongside the movie release**, the games generated buzz among their fans and Top Gun IP enthusiasts.

These collaborations reflect the growing trend of entertainment companies adopting **transmedia** strategies. While some IP holders choose to create IP-based video games, partnering with existing games through in-game assets, new content, and game modes offers a cost-effective way to tap into gaming audiences.

Aligning such collaborations with the broader launch and marketing activities of the IP generates interest from both IP enthusiasts and gaming fans, leading to increased engagement and revenue for the games.

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37

Global coverage with 37 markets, 8 regions



100+

Metrics including MAU, DAU, Lifetime Players, Revenue

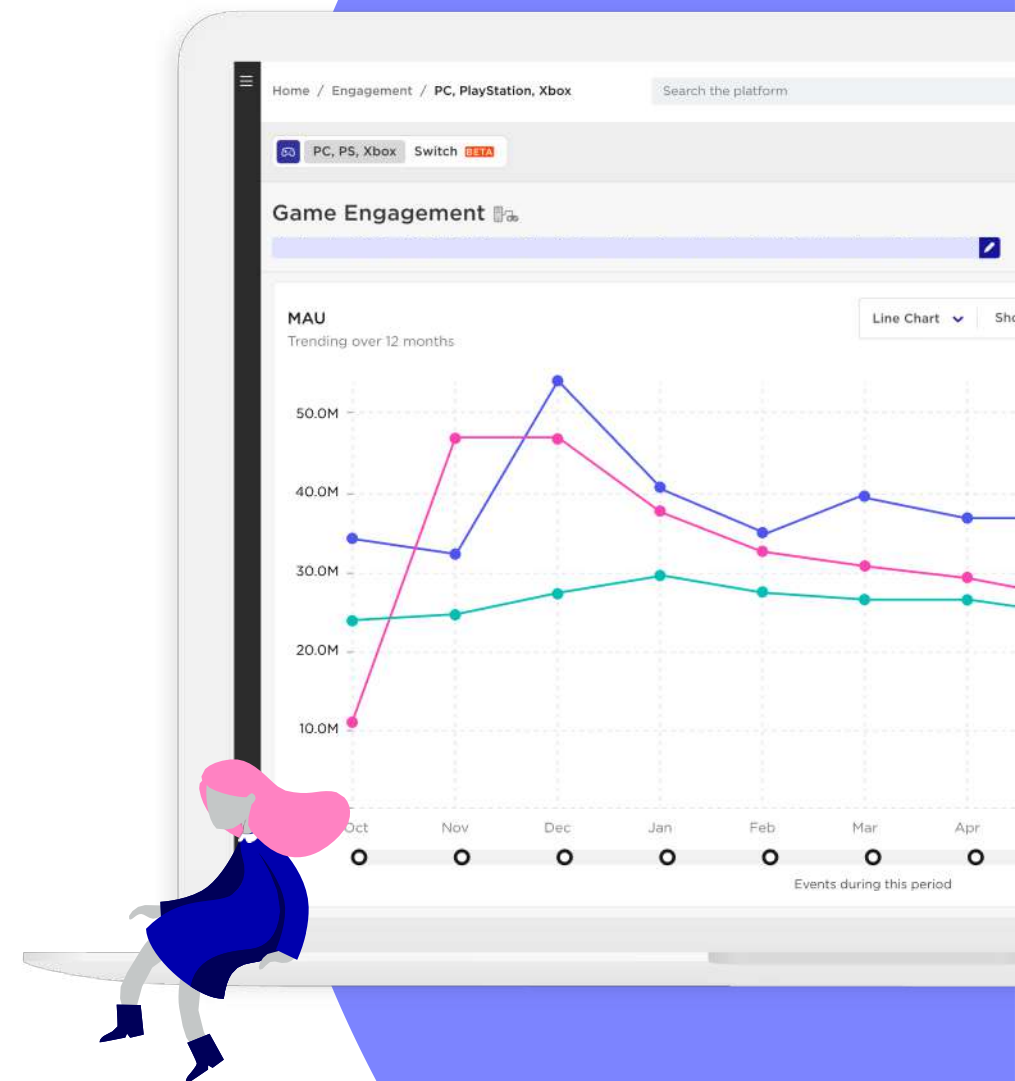
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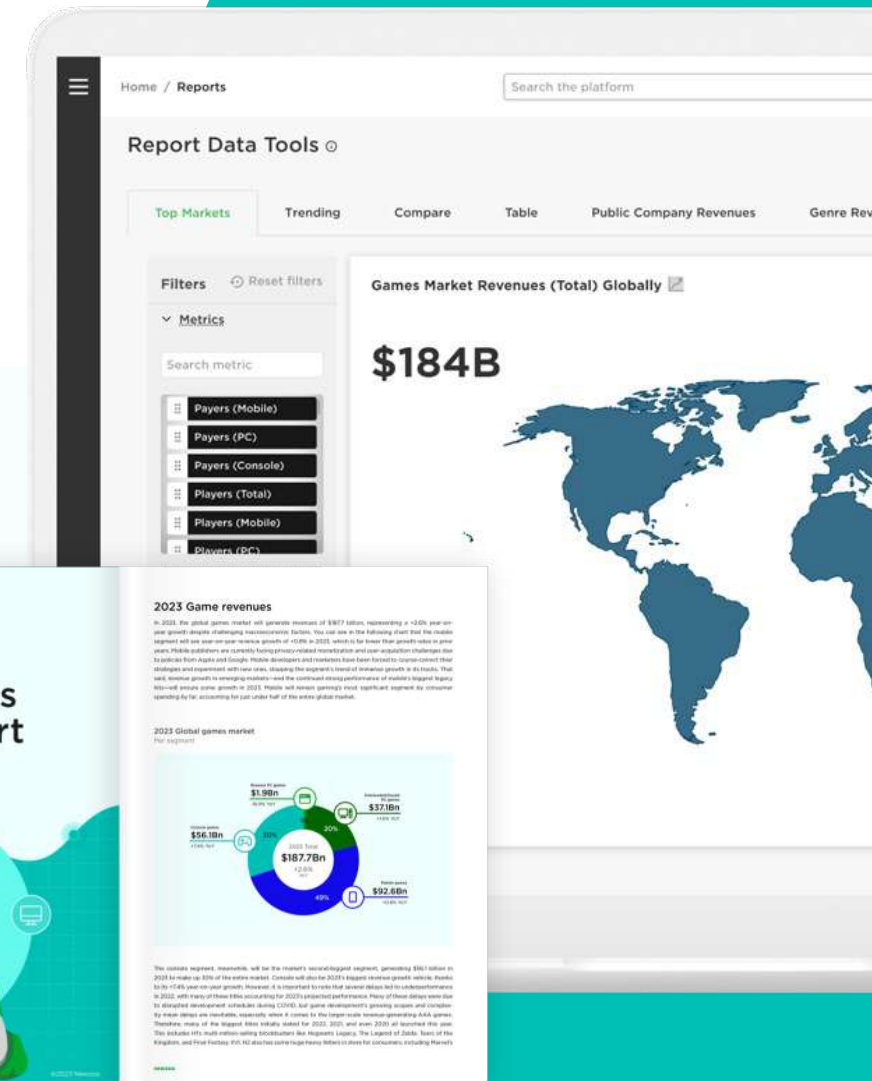


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“Newzoo’s team not only gave valuable insights that were integral to the concept testing of our game, but they were also incredible partners who delivered above and beyond every step of the project we worked with them on.

The team and their work are fantastic, and we look forward to continuing our relationship with them.



Jsajm ‘Sam’ Quino

Senior Brand Manager at Behaviour Interactive



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