

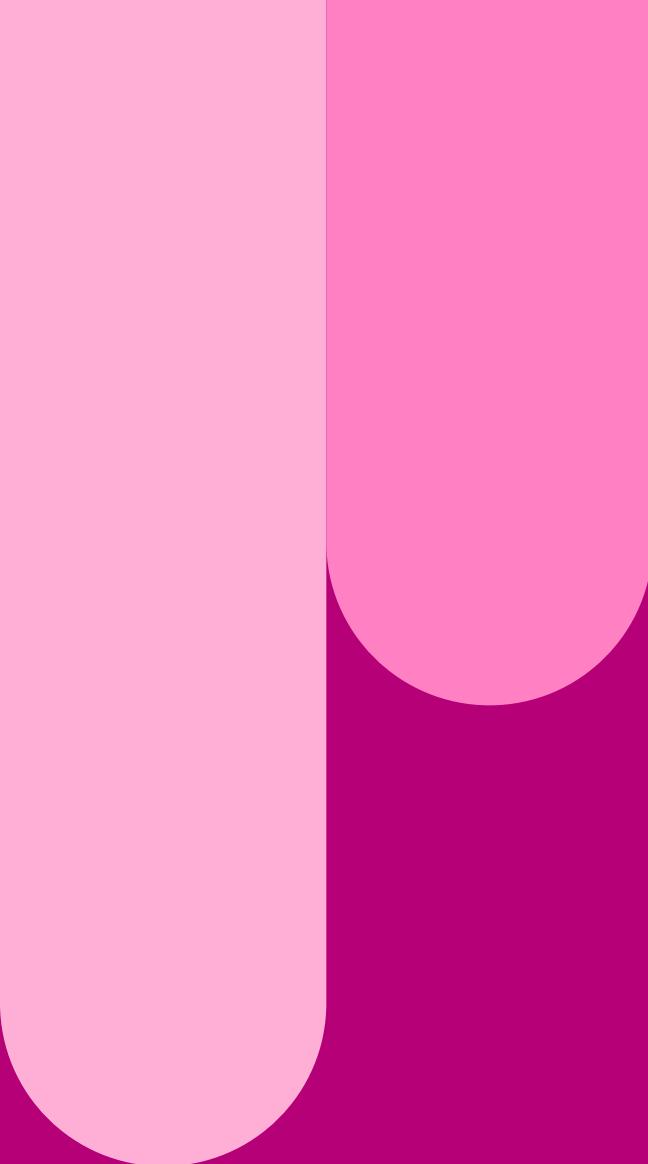
2025

Mapping IP fandom with the Global Gamer Study



Contents

01	<u>Foreword</u>	<u>03</u>
02	<u>Where and why IP matters to most gamers</u>	<u>07</u>
03	<u>Entertainment IP awareness: Global favorites and outliers</u>	<u>09</u>
	<u>Global favorites and niche IPs</u>	<u>10</u>
	<u>Anime vs. Hollywood blockbusters: Regional variations</u>	<u>11</u>
04	<u>Attitudes toward entertainment IPs: Regional preferences and insights</u>	<u>13</u>
	<u>Most and least liked IPs across regions</u>	<u>14</u>
	<u>Detailed regional variations</u>	<u>15</u>
05	<u>Entertainment IP awareness vs. attitude</u>	<u>16</u>
	<u>Global favorites</u>	<u>18</u>
	<u>Familiar faces</u>	<u>18</u>
	<u>Hidden gems</u>	<u>18</u>
	<u>Limited appeal</u>	<u>19</u>
06	<u>Final Thoughts: Selecting the right IPs for global player engagement</u>	<u>20</u>
07	<u>Newzoo Platform</u>	<u>22</u>



01

Foreword

Foreword

The boundaries between video games and other media are blurring, giving rise to a new era of transmedia entertainment. It's now easier than ever for people to immerse themselves in their favorite stories, characters, and universes across games, movies, TV, and more.

Gamers – a diverse and multifaceted demographic – are at the forefront of this evolution. They're not a homogeneous group; their varied motivations and tastes are reshaping how they engage with entertainment. For game studios and publishers navigating this shifting landscape, understanding how different intellectual property (IP) franchises resonate across markets and cultures has become more important than ever for driving player engagement.

This free report, *Mapping IP Fandom with the Global Gamer Study*, draws from the latest wave of our [2025 Global Gamer Study](#), spanning 36 markets. We recently introduced a new topic: awareness and attitudes toward entertainment IPs. In this report we've analyzed responses for 42 popular IPs – a list we plan to expand in future waves – to offer a high-level view of how gamers connect with these IPs globally and regionally.

In a time when iconic universes seamlessly cross from cinema screens to gaming consoles, understanding IP fandom isn't just interesting – it's a strategic imperative for creating the hits of tomorrow.

Enjoy reading!



Mary Brune
[Head of Consumer Insights](#)



Lynn van den Hoven
[Product Marketing Specialist](#)

Key Takeaways

Player interest in IP varies by region

01

Most gamers say they're more likely to play a game featuring their favorite IP, especially in **South Asia** and **Latin America**. However, Western Europe is less influenced. The right IP can boost engagement, but it must align with local fanbases.

Global favorites and outliers

02

Franchises like **Harry Potter**, **Disney**, and **Pokémon** enjoy near-global recognition. Others, like **Studio Ghibli** or **Arcane**, are niche globally but dominant in specific markets. Understanding where an IP is known and loved is key to maximizing impact.

Regional preferences

03

Anime dominates awareness in **Latin America** and **Southeast Asia**, but remains niche in the West. Conversely, Western IPs like **Shrek** or **SpongeBob** can outperform in unexpected regions like **South Africa** or Chile.

Sentiment isn't uniform

04

Globally loved IPs include **Shrek**, **Disney**, and **Harry Potter**. But **Hello Kitty** and **Yu-Gi-Oh!** face widespread indifference. Latin America and India show the highest positivity; Western Europe and Oceania are more reserved.

Awareness vs. Favorability

05

- **Global Favorites:** High awareness + high favorability (e.g., *Harry Potter*, *Fast & Furious*).
- **Familiar faces:** Well-known but not always favored (e.g., *Star Wars*, *Barbie*).
- **Hidden Gems:** Low awareness but beloved by fans (e.g., *Studio Ghibli*, *Doraemon*).
- **Limited Appeal:** Low recognition and low sentiment (e.g., *Percy Jackson*, *Doctor Who* outside core markets).

Successful IP use requires market-specific insights

06

Using licensed IP can accelerate awareness—but only if it resonates locally. IP perception is shaped by cultural relevance, genre affinity, and local gaming habits. Understanding **how different markets respond** to specific IPs is essential for both **effective collaboration** and **tailored marketing strategies**. One-size-fits-all doesn't work; localization is key.

Main contributors



Mary Brune
Head of Consumer Insights



Lynn van den Hoven
Product Marketing Specialist



Michael Wagner
Senior Market Analyst



Alexis Pamboris
Research Director



Nazrin Qayyum Azis
Senior Manager Product- Consumer Insight



Thao-Ngan Nguyen
Research Analyst



Spyros Georgiou
Design Lead

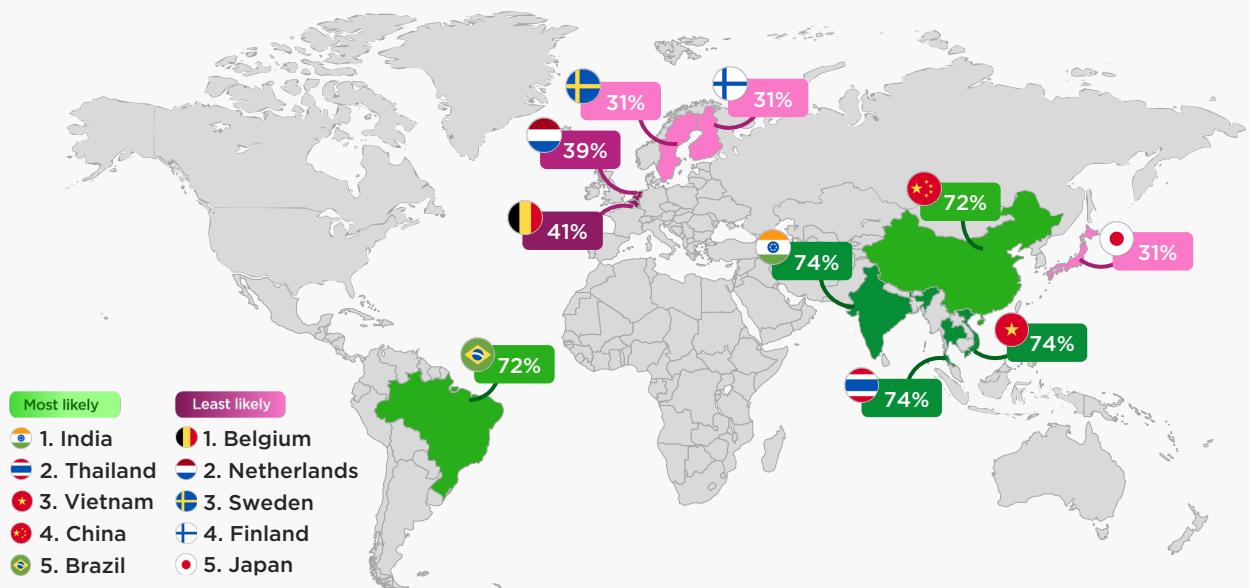


Inez Anema
Design Intern

02

Where and why IP matters
most to gamers

Most and least likely to play a game that features favorite entertainment brands

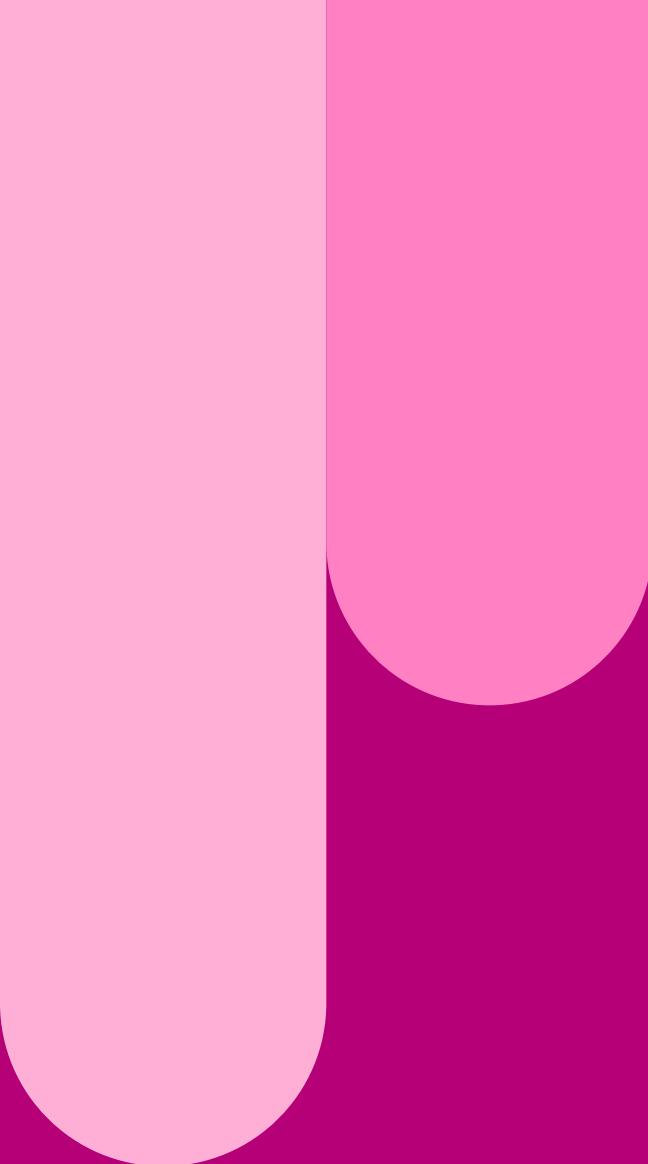


Globally, a majority of gamers agree that they're more likely to play a game featuring their favorite entertainment IP—with 24 out of 36 countries showing a majority in favor. This sentiment is especially strong in some specific markets. For instance, over 74% of gamers in South Asia and ~64% in Latin America say they're more likely to play a game that features their favorite entertainment brands, compared to about 45% in Eastern and Western Europe.

In today's live service landscape – where a game's success is tied to attracting and retaining a vibrant player base – integrating popular IP can re-energize a title with seasonal events, exclusive skins, or story expansions. These collaborations span from large titles such as *Fortnite*, *Minecraft*, and *Dead by Daylight* to smaller titles like *Dave the Diver*, *Balatro*, and *Vampire Survivors*, which all used this strategy to great effect.

A key to success can be found in aligning IP with target audiences: understanding which regions care about which franchises. A crossover that succeeds spectacularly in one country might be met with disinterest in another if the fanbase for that IP isn't present.

* These regional differences may be partially influenced by cultural response styles – for example, some countries tend to show higher overall agreement in surveys, while others are more conservative in self-reporting. This is an important consideration when interpreting cross-market comparisons.



03

Entertainment IP awareness

Global favorites and outliers

Entertainment IP awareness

		USA	Japan	Brazil	Vietnam	France	South Africa
	DC Universe (American comics)	70%	21%	72%	59%	40%	63%
	Doraemon (Japanese family anime)	25%	94%	31%	92%	18%	18%
	Dragon Ball (Japanese anime)	69%	90%	91%	88%	78%	89%
	Arcane (French/American collaborated animated series)	30%	10%	38%	75%	29%	28%
	Disney (American entertainment company)	88%	93%	94%	81%	87%	94%

Global favorites and niche IPs

When examining awareness of entertainment franchises among gamers worldwide, a few names clearly dominate. *Harry Potter* and *Disney* are in a close race for the top spot, with each franchise recognized by approximately 90% of gamers globally. Other highly known franchises include *Pokémon* (around 85% global awareness) and *Star Wars* (approximately 83%).

In contrast, the least-known franchises in our study tend to be either newer properties or highly region-specific. These IPs show significantly lower average awareness worldwide.

For example, Japan's renowned animation studio *Studio Ghibli* has a global awareness rate of just 31%, while Netflix's *Arcane* (part of the *League of Legends* universe) stands at 32%. The U.S.-based animated series *Invincible* fares only slightly better, with 33% global awareness. However, each of these cases reveal unique regional dynamics. *Studio Ghibli*, while niche globally, enjoys massive recognition in its home market—awareness in Japan reaches 88%. *Arcane* shows a different picture; even in its home markets, the U.S. and France, awareness remains relatively low at around 30%. Yet in Vietnam, awareness spikes to 75%, likely driven by the immense popularity of *League of Legends* and strong localization and marketing efforts.

Invincible, on the other hand, reveals a more evenly distributed awareness across countries, without dramatic spikes in any particular market.

These differences raise questions about the role of accessibility, distribution reach, genre preferences, and cultural resonance in shaping the global success of entertainment IPs.

Regional variations: Anime vs. Hollywood blockbusters

Examining entertainment IP awareness across regions reveals striking contrasts. Some franchises dominate in their home markets but remain largely under the radar elsewhere, while others achieve remarkable global reach. Nowhere is this more apparent than in the comparison between anime and Hollywood blockbusters.

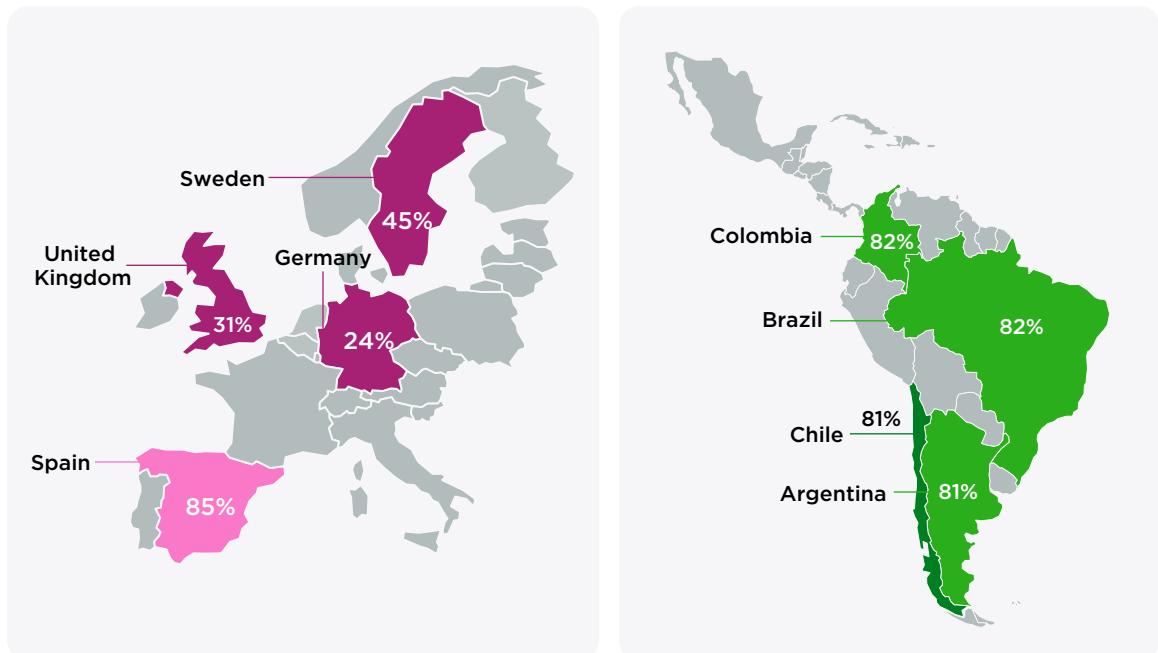
Take *Doraemon*, a classic Japanese anime character. In East Asia, it's a cultural icon—over 95% of gamers in Japan and 85% in South Korea recognize it. Yet, in Western countries like the UK, awareness drops sharply, with fewer than 15% of gamers familiar with the character.

A similar pattern emerges with *Detective Conan*, a beloved detective anime. It boasts high recognition across East Asia, the Middle East, and parts of Latin America—with awareness exceeding 70% in countries such as Chile and Egypt—but remains relatively niche in Western Europe and North America, where recognition typically hovers between 20% and 30%.

Anime is particularly popular in Latin-America. *Dragon Ball* and *Naruto* are prime examples, achieving near-universal recognition across Latin America and Southeast Asia. In countries like Brazil, Colombia, Chile, Indonesia, the Philippines, and Thailand, awareness regularly exceeds 85–90%—levels comparable to how mainstream Disney is in the UK. In contrast, awareness of these franchises in Western Europe and North America, though significant, usually ranges between 40% and 65%, about half the recognition they enjoy in other regions. This phenomenon can be traced back to decades of syndicated anime on Latin American television, which cultivated a generation of fans intimately familiar with characters like *Goku* and *Naruto*.

The reverse is also true: some Western franchises struggle to gain traction in certain Asian and Middle Eastern markets.

IP Awareness La Casa De Papel – Western Europe Latin America



Source: Newzoo Global Gamer Study, 2025, Entertainment IP attitude T2B (positive + very positive), Global weighted average across 36 markets, base n = from 196 to 64767; total n = 74405

The American *DC Universe* exemplifies this trend. While 70% of gamers in the US recognize DC characters, only 21% do so in Japan.

Interestingly, Latin America once again stands out, with *DC* awareness matching—or even surpassing—levels in the US, reaching up to 72% in some countries. Similarly, *LEGO*, the iconic Danish toy brand, enjoys strong awareness (around 80–90%) across Western countries and Latin America but sees a significant drop in familiarity in markets like India (55%) and Egypt (just 44%).

However, some Hollywood franchises resonate even more strongly overseas. *Shrek* and *SpongeBob SquarePants*, both family-oriented American titles, are recognized by over 90% of gamers in markets such as Chile and South Africa—surpassing their already high awareness of 80–85% in the US itself.

Another example is the Spanish TV series *Money Heist* (*La Casa de Papel*). While it achieves high awareness in Spain (85%), and averages 49% elsewhere in Europe, it became a cultural phenomenon in Latin America. Awareness levels in this region reach 80%, and was not only peaking in Spanish speaking countries but also reach 82% in Portuguese-speaking Brazil. Clearly, cultural resonance and linguistic accessibility play a significant role in driving its cross-border success.

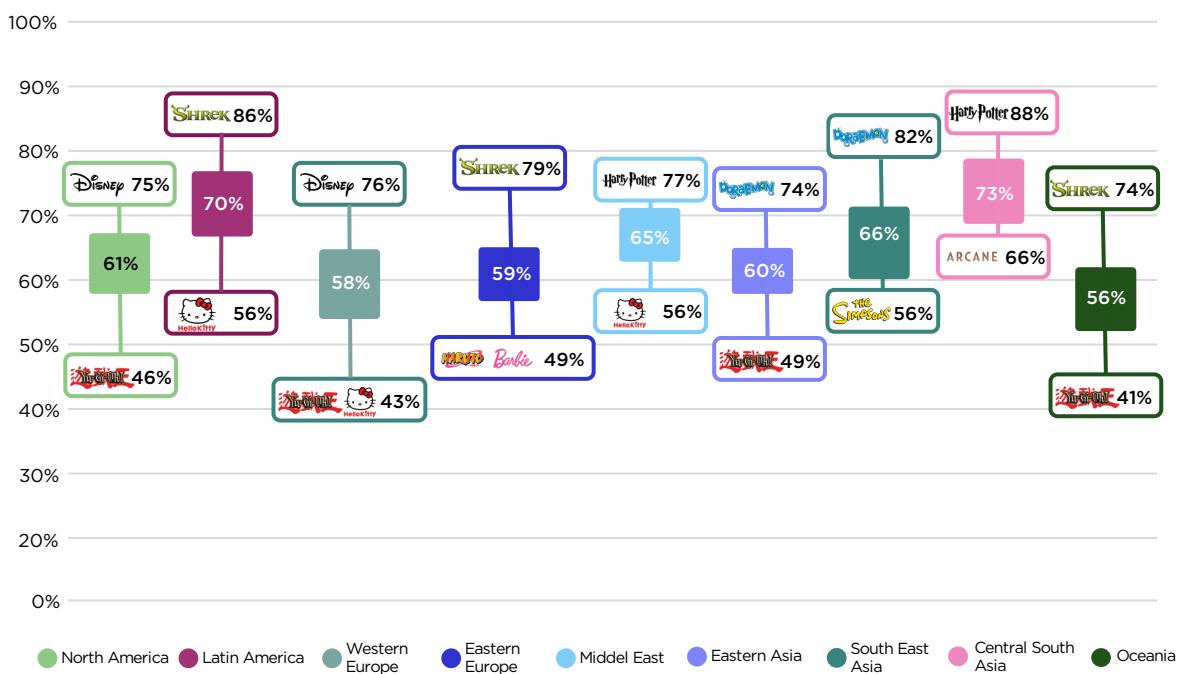
04

Attitudes toward Entertainment IPs

Regional preferences and insights

Entertainment IP attitude (positive + very positive) by market regions

Each box shows average, highest, and lowest positive sentiment for top entertainment IPs by region



Most and least favored IPs across regions

Attitudes toward entertainment IPs – measured as the share of gamers feeling “positive” or “very positive” about each franchise – vary a lot by region. Globally, franchises like Dreamworks’ *Shrek*, *Disney*, and *Harry Potter* provide broad appeal and a strong positive reception everywhere, this makes them reliable choices for worldwide releases or cross-market promotions.

On the other hand, IPs such as *Hello Kitty* or *Yu-Gi-Oh!* are among the least favored, these audiences tend to be more niche than widely adopted across the market.

What is evident from our data, is that Latin America and India are generally very positive about the IPs – these markets can amplify the success of a well-chosen franchise collaboration. Conversely, Western Europe and Oceania are more critical overall, so even a big-name IP won’t automatically guarantee gamer excitement.

From an intercultural perspective, it might look like Western Europe and Oceania are simply more critical of entertainment IPs—but response patterns and cultural differences may influence how people express opinions. For example, in some regions, particularly in Latin America and parts of Asia, people may be more inclined to give positive feedback due to social norms that favor agreeable and socially desirable responses.

In contrast, it might appear that players in Western Europe and Oceania are less enthusiastic about entertainment IPs—but that doesn't necessarily mean they are any less likely to engage with or be influenced by them. This is more likely the product of differing cultural response patterns

Of course, this isn't a perfect explanation—every market is different, and these are broad generalizations that won't apply to every individual or situation. Ultimately, everything is relative, and we encourage users to look within each market to truly understand local favorites and least favorites.

Detailed regional variations

North America & Western Europe: Strong affinity for widely recognized Hollywood IPs. *Disney* and *Harry Potter* lead, while IPs like *Yu-Gi-Oh!* and *Hello Kitty* lag.

Latin America: Particularly enthusiastic about animated and family-friendly franchises. *Shrek* ranks exceptionally high in positive sentiment (86%).

Eastern Europe: Similar preferences to Western Europe but slightly more positive across the board, with strong enthusiasm for franchises like *Shrek* and *Harry Potter*.

Middle East & Africa: High favorability towards fantasy-driven franchises like *Harry Potter* and *Pirates of the Caribbean*, while dystopian or darker themes resonate less.

East & Southeast Asia: Strong cultural preference for Japanese IPs, with franchises such as *Doraemon*, *Pokémon*, and *Studio Ghibli* leading. Western toy brands and IPs, like *Barbie*, typically underperform.

India: Displays the highest overall positivity, particularly toward Western fantasy and superhero franchises, with *Harry Potter* achieving remarkable favorability (88%).

Oceania (NZ and AUS): Reflects tastes similar to Western Europe, preferring major Hollywood IPs and displaying limited interest in niche anime or gaming franchises.

05

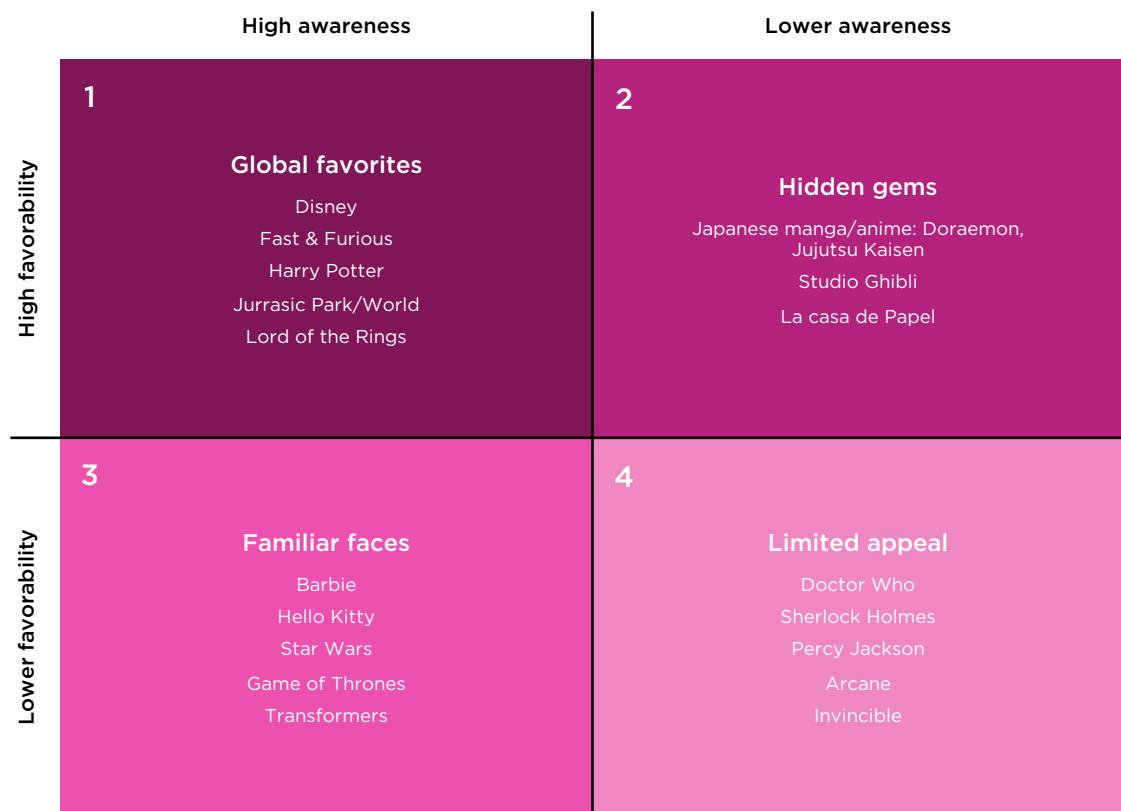
Entertainment IP
awareness vs attitude

Entertainment IP Awareness vs. Attitude

Due to various factors, an entertainment IP might be popular in one country but unpopular in another. We wanted to identify countries where there's low awareness, yet higher favorability (positive/very positive attitude) and conversely, countries where the opposite occurs. This helps pinpoint market opportunities and target specific markets effectively. We've categorized entertainment IPs into four distinct categories to delve deeper into this:

- 1 **Global favorites:** High Awareness + High Favorability
- 2 **Hidden gems:** Lower Awareness + High Favorability
- 3 **Familiar faces:** High Awareness + Lower Favorability
- 4 **Limited appeal:** Lower Awareness + Lower Favorability

Entertainment IP awareness vs. attitude



Source: Newzoo Global Gamer Study, 2025, Entertainment IP attitude T2B (positive + very positive), Global weighted average across 36 markets, base n=from 196 to 64767; total n=74405

Global favorites

A handful of franchises achieve both high awareness and strong favorability in almost every market. Examples include *Disney* (and its flagship characters), *Harry Potter*, *Jurassic Park/World*, *The Lord of the Rings*, and fast-action series like *Fast & Furious*. These IPs transcend regional barriers, often through timeless themes or multi-generational appeal.

Familiar faces

Barbie and *Hello Kitty* are among the most globally recognized IPs, with near-universal awareness across markets. However, in several countries, they tend to rank lower in favorability compared to other franchises. This may reflect differences in cultural resonance, evolving audience interests, or the perception that these IPs primarily cater to specific age groups or demographics. Their broad visibility remains a strength, but perceptions vary by market.

Star Wars is an interesting case: the franchise is extremely well-known globally; however, in regions like Asia and parts of Europe, it does not always top the favorability charts.

Game of Thrones became a worldwide phenomenon (high awareness), but after a controversial finale its sentiment took a hit in many places – it appears polarizing in numerous countries, meaning many fans remember it, but not all remember it positively.

Transformers is globally recognized, yet its favorability isn't equivalent. This could be due to repetitive sequels, lack of character depth, and a strong nostalgic attachment among 80s and 90s kids. Despite numerous reboots, which have struggled to resonate with newer audiences, the franchise remains well-known but not universally loved, particularly in Western Europe and Eastern Asia, where positive attitudes range from 54% to 61%.

Hidden gems

Japanese anime and manga franchises in regions outside Japan (e.g. *Doraemon*, *Jujutsu Kaisen*, *Attack on Titan*, etc.). In Western countries only the core anime fans know them, but those fans rate them highly.

Classic or niche genres such as *Studio Ghibli* films – relatively lesser-known to the general public in some West/Asia markets but adored by those familiar.

Local/regional IP outside their home market such as *La Casa de Papel* (Money Heist), a Spanish series, is a hidden gem in Latin-American countries.

Limited appeal

These IPs tend to score low on both awareness and favorability across global markets, often due to niche positioning, cultural specificity, or limited recent exposure. For example, British TV properties like *Doctor Who* or classic detective stories such as *Sherlock Holmes* may resonate well in English-speaking markets but remain under the radar elsewhere — potentially perceived as dated or culturally distant.

Adaptations like *Percy Jackson* also fall into this category; while the original books had a strong fan base, the film adaptation struggled to gain traction, leading to low global awareness and lukewarm attitudes among those familiar with it.

More recent entries like *Arcane* and *Invincible*—despite critical acclaim—have yet to break into mainstream popularity outside of core fan segments like gamers or comic book enthusiasts.

That said, this category presents a valuable opportunity for deeper exploration. By analyzing the [Global Gamer Study](#) data more closely, publishers and developers can uncover where pockets of passionate fans exist and learn how best to reach and grow those communities. Identifying who these audiences are, what drives their interest, and where to find them can help unlock new potential for these lesser-known or narrowly received IPs.

06

Final thoughts

Selecting the right IPs for Global Player Engagement

Whether you're launching a new title or looking to attract new players to your current one, reaching new audiences seems to be getting more difficult every day. Many publishers are turning to licensed IPs to gain attention quickly. However, not all IPs are equally effective across different markets. As transmedia and IP collaborations ramp up, understanding how players connect with IPs will be key to maximizing their impact.

Our findings show that IP perception can vary significantly from market to market—shaped by factors like brand recognition, cultural relevance, historical genre affinities, and local gaming habits. A title that feels instantly resonant in one region may carry little weight—or even friction—in another.

Understanding how audiences respond to IPs across markets is a critical first step. But it's only the beginning. To truly unlock the potential of an IP, developers and publishers need to understand the audience behind it—who they are, what they value, and how their gaming preferences align with the IP. This deeper level of insight is key to informing both game development and go-to-market strategies.

These high-level trends only scratch the surface of what's possible. By diving deeper into individual markets, demographics, and player behavior, we can uncover nuanced opportunities to better position IPs for success.

Ready to take the next step?

Let us help you make smarter, more strategic IP decisions.

[**Newzoo's Global Gamer Study**](#) is the world's most comprehensive consumer research on gaming audiences and gaming behavior, providing valuable insights into the global gaming landscape and audiences in 36 markets.

[**Reach out**](#) if you are interested in researching a particular franchise or looking for insights into a specific market—we can tailor a custom research project to meet your goals.

Explore player behavior insights in the Global Gamer Study

 **73,000+**
Consumers surveyed yearly

 **36**
Markets covered

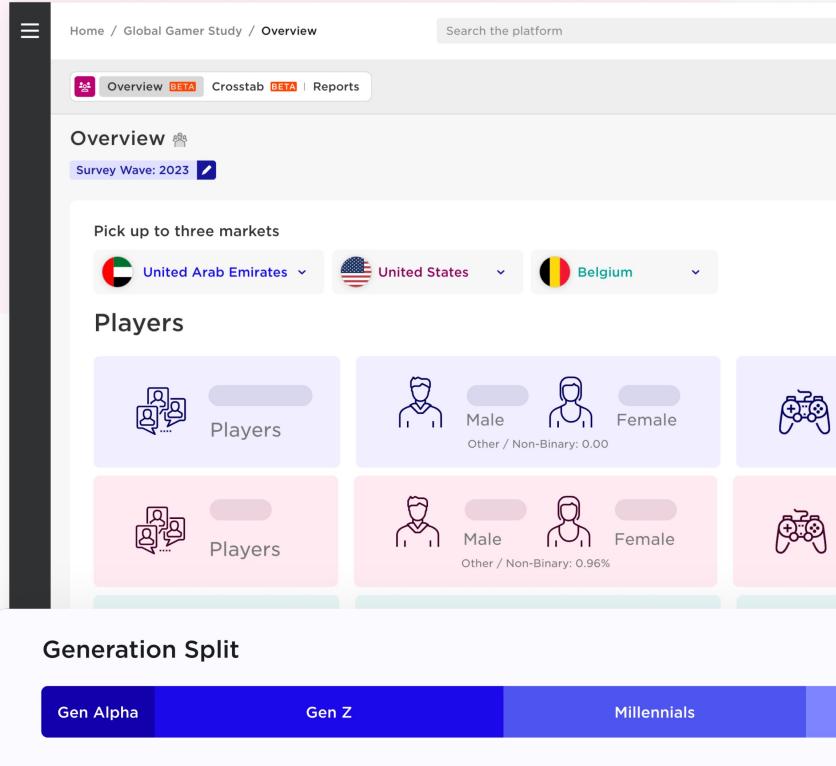
 **200+**
Variables tracked

 **3+**
Years of data and reports

- Full **demographic and psychographic** profiles of gamers across 36 markets
- Gaming, spending, and viewing** behavior and attitudes, per platform
- Game franchises** played, attitudes and purchase funnel
- Motivations to play games** and **gamer personas**
- Media** (incl. transmedia and IP deepdives), **lifestyle**, and **consumer brands** consumption
- Gaming **hardware and peripherals**
- UGC, modding, and cloud gaming** insights

[Find out more](#)

[Take a tour](#)



The screenshot shows the 'Overview' section of the platform. At the top, there's a navigation bar with 'Home / Global Gamer Study / Overview' and a search bar. Below the navigation is a header with 'Overview' and a survey wave indicator 'Survey Wave: 2023'. A sidebar on the left has a menu icon.

Under the header, there's a section for picking up to three markets, with options for United Arab Emirates, United States, and Belgium. The main area is titled 'Players' and shows two sections: one for the UAE and one for the US. Each section displays player counts, gender distribution (Male, Female, Other / Non-Binary), and a percentage for 'Other / Non-Binary' (0.00% for UAE, 0.96% for US). To the right of these are icons for game controllers.

At the bottom, there's a 'Generation Split' section with a horizontal bar divided into three colored segments: dark blue (Gen Alpha), light blue (Gen Z), and light purple (Millennials).