

Habo Strategic
studio

IP INDEX

2022 Edition - United States

Introducing the first-ever study that focuses on the value of intellectual properties.

Plenty of studies analyze consumers' perception of brands in terms of their reputation, popularity or resonance, but surprisingly few of them focus on a central element of the entertainment, creative and licensing industries: intellectual properties.

In an effort to understand what makes an IP strong, and to help entertainment companies make strategic choices, Habo is launching its first edition of the **Habo IP Index**—a study that aims to assess the strength and potential of the largest intellectual properties.

Underpinned by a study conducted in May 2022 among more than 5,300 Americans, this first edition of the Habo IP Index evaluates the strength and potential of 70 intellectual properties from the worlds of film, television, video games, books and musicals.

The Habo IP Index is designed as a longitudinal study. Year after year, we'll be tracking the evolution of intellectual properties through the model's various indicators.

Beyond intellectual properties: human brands.

Even though movies, television or video games are powerful tools for developing and deploying intellectual properties, it is also common to see many entertainment concepts or licensing approaches based on musical, artistic or even social media celebrities. **We will soon begin an in-depth study that will focus on human brands and the results of this study will be available for SXSW 2023. Stay tuned!**



Intellectual properties: A bargaining chip in the entertainment industry.

In the entertainment industry, intellectual properties play a dual role.

First, they're a fabulous source of revenue—just look at successful movie franchises.

In 2021, **79%** of the revenue generated by the top 100 films at the U.S. box office came from franchises.

They also maximize consumer appeal, mitigating risk in this highly volatile and often unpredictable industry.

In 2020, **23%** of overall mobile game player spending in the U.S. was generated by IP-based titles and three of the top 10 revenue generating mobile games in the United States utilized IP.

But not all intellectual properties are equal.

Though there seems to be endless opportunities to incorporate intellectual properties into entertainment experiences, they don't necessarily guarantee success.

There are many examples of projects that failed despite their connection to intellectual properties. The musical *Spider-Man: Turn Off the Dark* posted a loss of U.S. \$60 million. Other intellectual properties have suffered the same fate on Broadway (*SpongeBob SquarePants*, *King Kong* and *Rocky*, to name a few). And the attempt to expand the *Harry Potter* franchise

through the *Fantastic Beasts* film series has been a relative failure so far.

Using intellectual properties is therefore costly, sometimes risky, and can't be applied in a one-size-fits-all approach across all market and consumer segments.

Beyond the strength of the attached IP (which is the focus of this study), several other factors can influence the success or failure of an IP-based entertainment product. The creative concept itself, the price positioning, the location of the experience, and its ability to generate and (especially) convert word-of-mouth are all factors that can have a significant influence on revenue generation.



The main questions to ask when assessing an intellectual property's potential.

This page summarizes the key questions an organization should ask itself when developing an IP-based experience or building a roadmap for its own IP.

Some of these questions may seem obvious, but it does happen that we're called upon to work on feasibility studies or business models for projects derived from intellectual properties that are a bad fit for our clients' commercial and economic ambitions.

Access to the most promising intellectual properties is difficult and expensive. They tend to be already protected by exclusive contracts in several categories and territories. Thus, the business challenge lies in the tension between a fair assessment of an IP's value and the realistic market potential that can be extracted from it.

1

Is this intellectual property universally known across all market segments?

2

Is the public very familiar with this intellectual property, beyond its name?

3

Does this intellectual property have a positive image with the public?

4

Are audiences strongly attached to this intellectual property?

5

Can this intellectual property be stretched across multiple product categories, beyond its original format?

6

Do consumers place a high value on this intellectual property, and are they willing to pay for it?

7

Is this intellectual property performing well (purchase intent and assigned value) in high market potential categories?

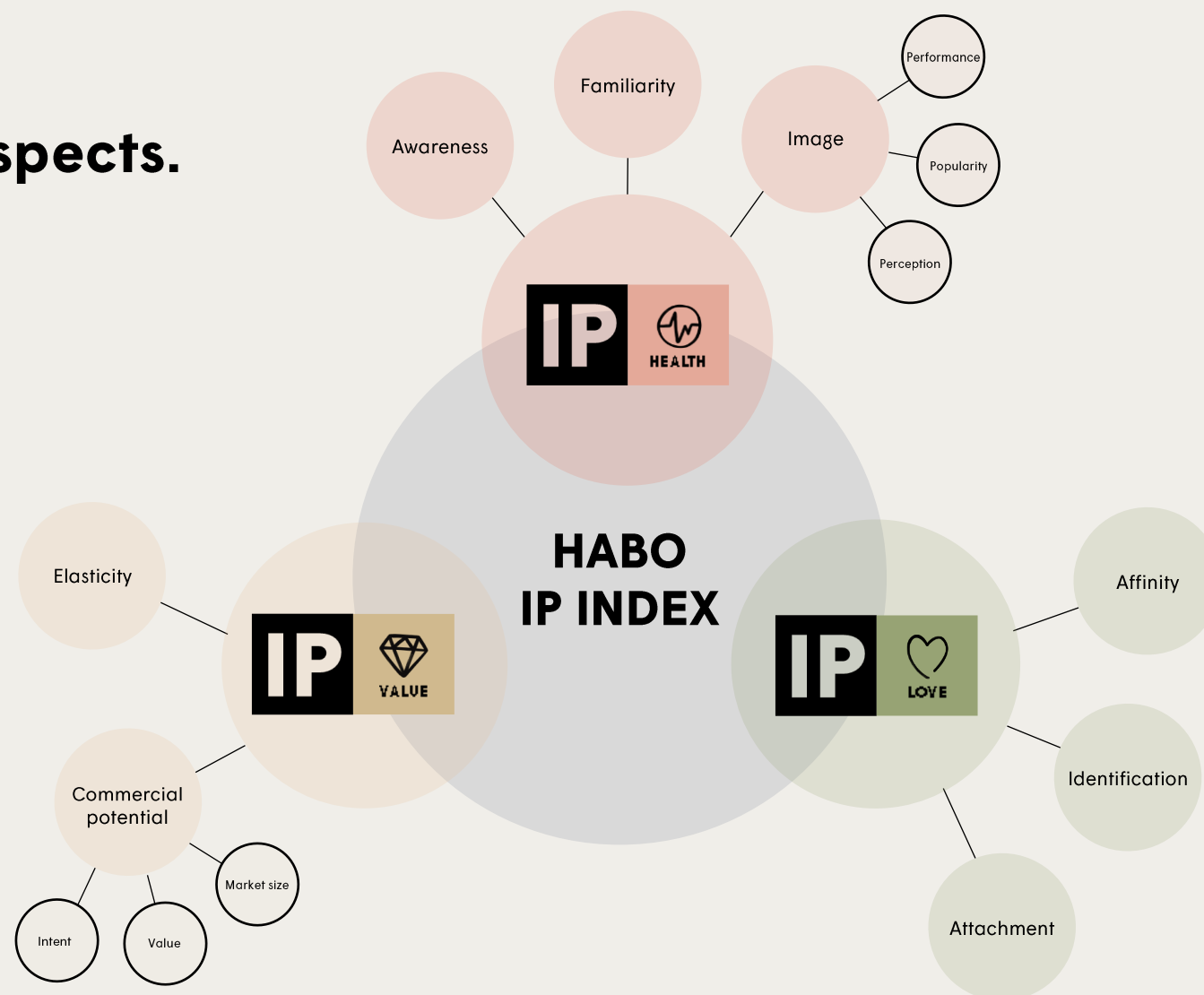
The Habo IP Index: A strategic framework built around three fundamental aspects.

The **Habo IP Index** first started with a hunch: through our projects, we realized that consumers often felt particularly involved emotionally when it comes to IPs and experiences designed around them (at least, more involved than with most traditional brands). To further explore how this bond translates to the success of new experiences, we decided to develop a rigorous, multidimensional methodology.

First, through an extensive review of the scientific background pertaining to intellectual properties, we identified 12 key variables to consider when evaluating the strength of an IP.

We then put our model to the test by surveying more than 5,300 Americans and identified the three aspects that comprise the value of an IP: **IP Health**, **IP Love** and **IP Value**.

Rooted in social identity and brand attachment theories, the **Habo IP Index** uses Mael and Ashforth's widely accepted and highly regarded frameworks for identification and attachment to explore the emotional bond between consumers, IPs and their communities of fans.



Choosing 70 intellectual properties from an almost infinite universe.

Intellectual properties are virtually limitless in number. To conduct this study, we needed to define a methodology for selecting a smaller sample of intellectual properties—making sure to include the most obviously promising ones, but also others that seemed weaker.

We defined the scope of the study by choosing intellectual properties from movies, television, video games, books and musicals. For this first edition, we've deliberately excluded comics and manga, whose audiences are more niche (both socio-demographically and geographically). We've also excluded brands (e.g., Barbie, National Geographic, NASA) and human brands (e.g., Van Gogh, Rolling Stones, Kim Kardashian).

The 70 intellectual properties in the study were then selected in two steps:

1- We listed the strongest intellectual properties in each category based on key indicators reflecting their popularity with the American public (box office, sales, etc.). Two-thirds of the intellectual properties measured in this study consist of the strongest titles in each category.

2- We rounded out the last third of this list with intellectual properties chosen according to our expertise—either because they held strong potential (e.g., *Dune*) or to ensure more niche properties would be included (e.g., *Cocomelon*). If the study had only measured the strongest intellectual properties, it would have been lacking a sense of scale.

SELECTION PROCESS OF THE INTELLECTUAL PROPERTIES TESTED

2/3

of the intellectual properties were selected based on key performance indicators.

- **Movies:** box office gross by franchise (lifetime) + total watch-time on streaming platforms (2019 to 2022)
- **TV series:** total watch-time on streaming platforms (2019 to 2022) + most rated on IMDb (lifetime)
- **Video games:** gross by franchise (lifetime) + player count (2018 to 2022)
- **Books:** total number of copies sold (lifetime)
- **Musicals:** gross revenue (lifetime)

1/3

of the intellectual properties were selected based on our expertise.

- Intellectual properties that hold strong potential, but are less established
- Intellectual properties that target a more niche segment
- Intellectual properties that seem weaker, in order to ensure relativity in the study

Standing high on the podium



Top 20 intellectual properties in the U.S. in 2022 based on the Habo IP Index



Disney
THE
LION KING

1



2



PIRATES
of the
CARIBBEAN

3



TITANIC

4



STAR
WARS

5



Harry Potter

6



FAST &
FURIOUS

7



SpongeBob
SQUAREPANTS

8



the
SIMPSONS

9



10



SUPER
MARIO

11



BLACK
PANTHER

12



JUMANJI
WELCOME TO THE JUNGLE

13



THE
AVENGERS

14



ROCKY

15



MORTAL KOMBAT

16



SHREK

17



SPIDER-MAN

18



INDIANA
JONES

19



TOY
STORY

20

Most of the strongest intellectual properties come from the field of arts and literature.

Most of the IPs tested are known to the general public in more than one form. Take *Harry Potter*, which is now equally well known for its books and for its film adaptations.

The fact that 65% of the top 20 IPs in the **Habo IP Index** were originally books, comics or musicals clearly shows the great potential of IPs born from the arts and literature world to be adapted into different types of products and experiences.

How to read this graph?

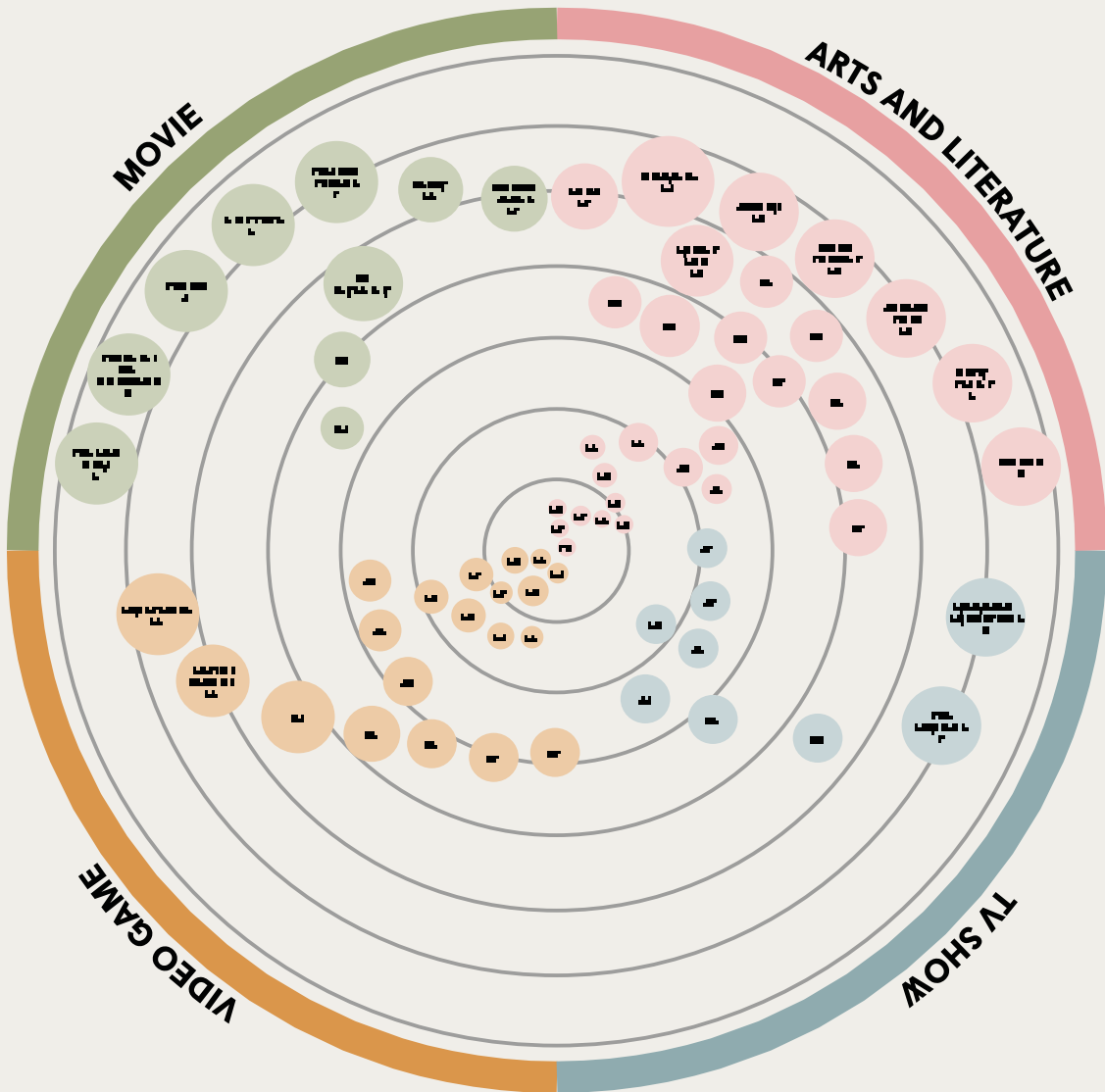
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1- The intellectual properties tested are classified according to the form of the first product to feature them (movie, arts and literature, TV show, video game).

2- The number indicated in each bubble corresponds to their **Habo IP Index** rank out of a total of 70 intellectual properties tested in the study.

3- The further away from the center an IP is, the higher its overall value according to the **Habo IP Index** based on the IP Health, IP Love and IP Value.

4- The commercial potential of intellectual properties is represented by the size of the bubbles. The larger the bubble, the more the IP can be monetized.



1	The Lion King	30	Transformers
2	Batman	31	Pac-Man
3	Pirates of the Caribbean	32	Guardians of the Galaxy
4	Titanic	33	Lord of the Rings
5	Star Wars	34	Frozen
6	Harry Potter	35	Call of Duty
7	Fast and Furious	36	Star Trek
8	SpongeBob SquarePants	37	Sonic the Hedgehog
9	The Simpsons	38	X-Men
10	Jurassic Park	39	Pokémon
11	Super Mario	40	Resident Evil
12	Black Panther	41	The Legend of Zelda
13	Jumanji	42	Minecraft
14	Avengers	43	Twilight
15	Rocky	44	Breaking Bad
16	Mortal Kombat	45	Mission: Impossible
17	Shrek	46	The Smurfs
18	Spider-Man	47	Paw Patrol
19	Indiana Jones	48	Fifty Shades of Grey
20	Toy Story	49	The Big Bang Theory
21	Superman	50	Fortnite
22	Jaws	51	The Phantom of the Opera
23	Friends	52	Stranger Things
24	Grand Theft Auto	53	Need for Speed
25	James Bond	54	PlayerUnknown's Battlegrounds
26	Hunger Games	55	The Chronicles of Narnia
27	Game of Thrones	56	Candy Crush
28	Avatar	57	League of Legends
29	The Walking Dead	58	Chicago - The Musical
		59	The Sims
		60	The Book of Mormon
		61	Da Vinci Code
		62	Final Fantasy
		63	Halo
		64	Roblox
		65	Assassin's Creed
		66	Hamilton
		67	Dune
		68	Wicked
		69	The Little Prince
		70	Cocomelon

Assessing the strength of an intellectual property



How does the Habo IP Index work?

The **Habo IP Index** model is broken down into three main aspects that make up the real value of an intellectual property. First, its overall health indicators. Second, its relationship with consumers and fans. Finally, its ability to be monetized and deployed in different categories.

The Habo IP Index can be applied to any intellectual property in the world and used to place the value and potential of an IP relative to the titles included in this study.

It allows business leaders, creators, producers or intellectual property owners to make informed choices about their IP and make their business model a creative and commercial success.



Known and understood

The higher an intellectual property's **IP Health**, the better known it is (both in terms of notoriety and familiarity), and the more positive its image in the eyes of consumers.



Loved and admired

The higher an intellectual property's **IP Love**, the more consumers love it and feel attached to it and its other fans.



Monetizable and scalable

The higher an intellectual property's **IP Value**, the better it can generate revenue and be diversified into multiple categories.



Combining the three aspects of the model, the **Habo IP Index** assesses the overall value of an intellectual property.



Known and understood

IP Health measures consumers' **rational** relationship with an intellectual property. It is an indicator of the overall health of a property and is based on three components: the level of awareness of the IP, consumer familiarity with it, and its perceived image.

This perceived image is itself broken down into three sub-characteristics: popularity, performance and relevance of the IP in the eyes of consumers.





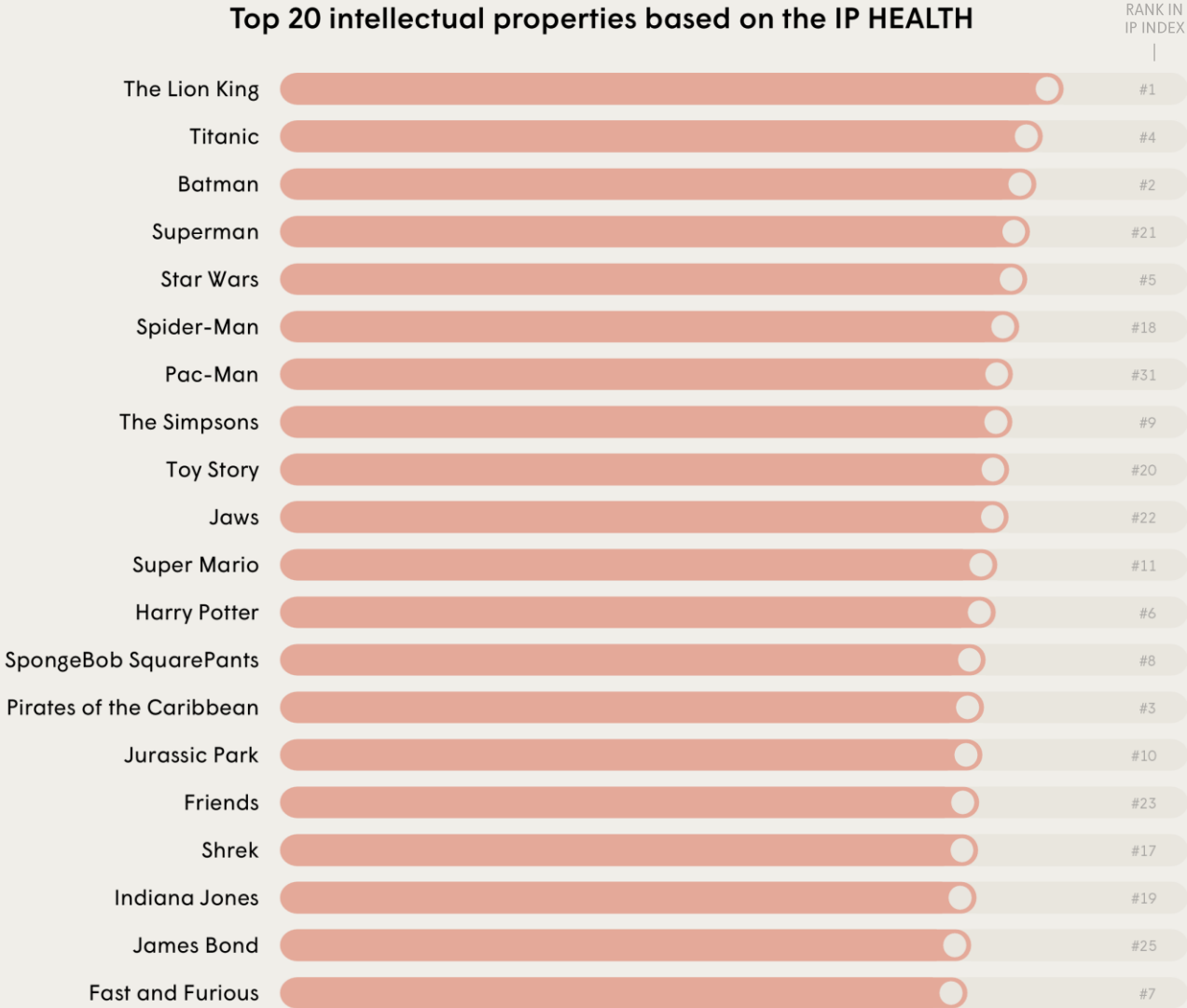
Awareness: A key component of the Habo IP Index

The overall health of an IP (and, to some extent, its overall **Habo IP Index** score) depends first and foremost on the public’s awareness of it. The intellectual properties that make it to the top of the rankings all have one thing in common: they are known by the majority of Americans. For example, the top three spots in **IP Health** belong to *The Lion King*, *Titanic* and *Batman*—all names which 97% of Americans know about.

Of course, consumers’ familiarity with and perception of an IP are also important components. But intellectual property clearly loses a great deal of value if too few consumers know about it.

Intellectual properties from the movie industry exhibit the strongest overall health.

Their average awareness rate in this study was 89%. Conversely, video games seem to attract a more niche audience, as they are known on average by only 62% of Americans—with the exception of *Pac-Man*, *Super Mario* or *Pokémon*, which are among the strongest intellectual properties in terms of awareness.





Loved and admired

IP Love echoes the **emotional** relationship consumers have with an intellectual property. It is analyzed across three dimensions: fans' level of affinity with the IP, their perceived attachment to the IP, and their sense of community with other fans.





The concept of IP Love is the biggest difference between an intellectual property and most products or brands.

One of the strengths of an intellectual property is the emotional attachment consumers have to it, and the sense of community they feel towards its other fans.

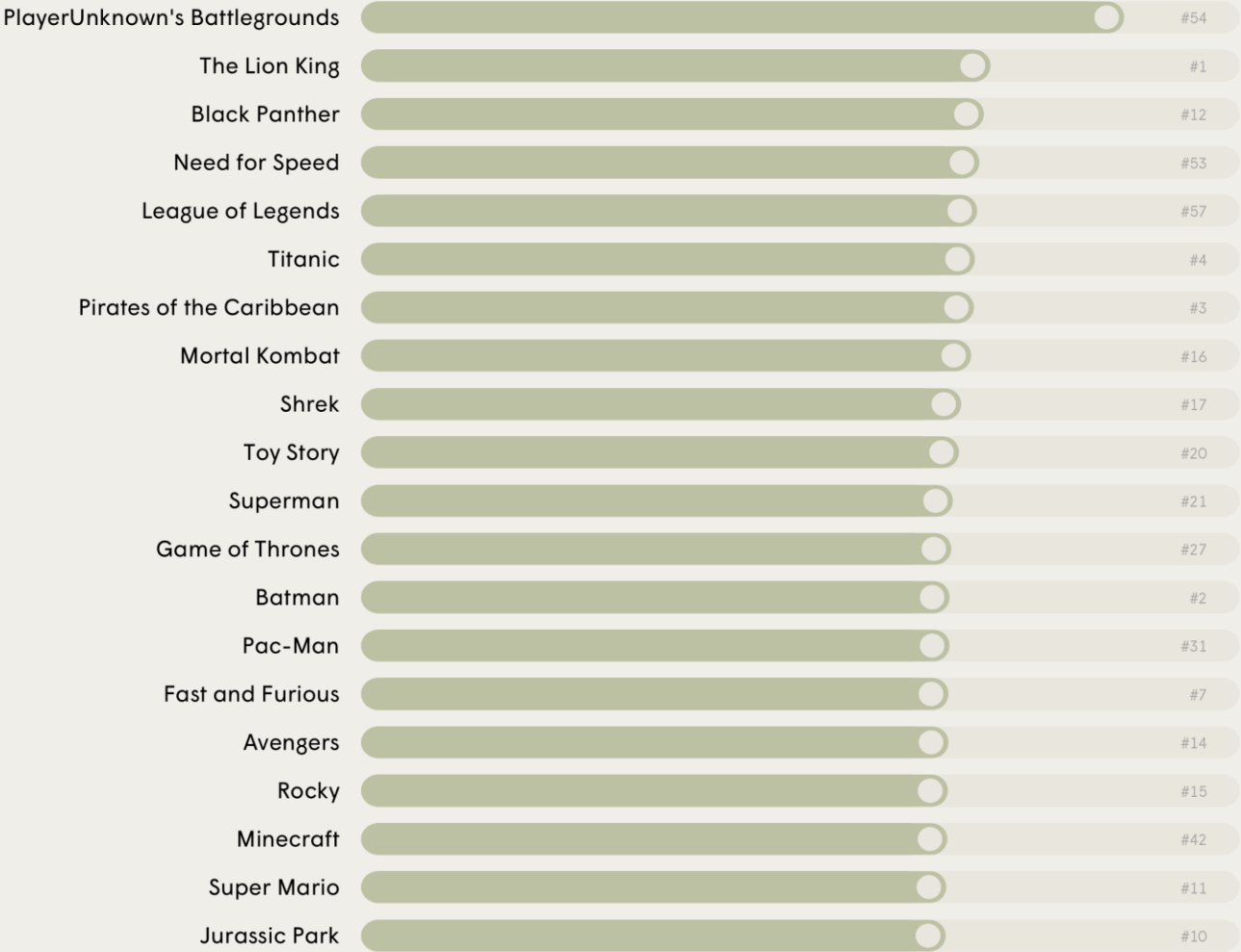
The more emotionally connected consumers are to an IP and its fans, the more likely they are to spend and transfer their emotions to experiences or merchandise.

Video games have the most attached and engaged fan bases.

On average, the study's numbers indicate that the fan base for all of the intellectual properties tested comes out to 11% of Americans who are aware of them. This proportion rises to 16% for the most popular video games. In particular, a niche game like *PlayerUnknown's Battlegrounds* (known by only 20% of Americans) boasts a 26% fan base among those who know it.

Top 20 intellectual properties based on the IP LOVE

RANK IN
IP INDEX
|





Monetizable and scalable

IP Value measures the possibilities for **monetizing** an intellectual property. It involves two main indicators: the commercial potential of the IP—derived from consumers' purchase intent for the IP across different product categories (and said categories' market size)—and the IP's level of elasticity across these product categories.





Intellectual properties are highly elastic in the categories of restaurants and bars, amusement parks and clothing.

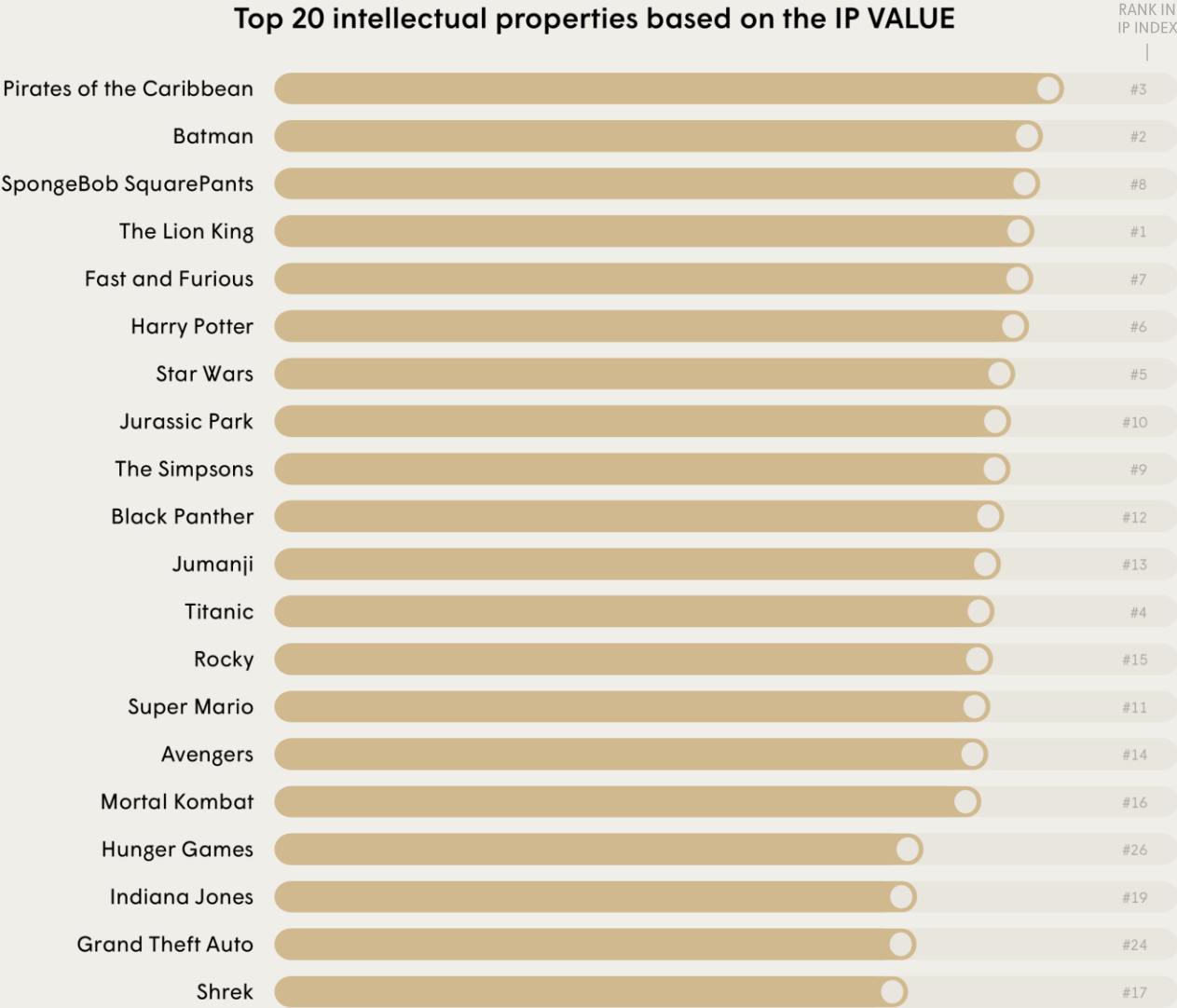
Americans tend to consume these experiences more frequently, and they’re willing to pay a higher price when said experiences are built around an IP.

The vast majority of the intellectual properties tested would work well in film form, regardless of their original category.

Very few titles generate low purchase intent as a movie or an animated film (such as *Candy Crush*, *PlayerUnknown’s Battlegrounds* and *Roblox*).

As the entertainment category with the highest overall purchase intent among Americans (and the one with the highest penetration rate), movies seem to be the preferred medium for diversifying an IP. Moreover, in the last few years, many books and comics found great success following their movie adaptation (*Black Panther*, *Avengers*, *Jumanji* and many others).

Top 20 intellectual properties based on the IP VALUE

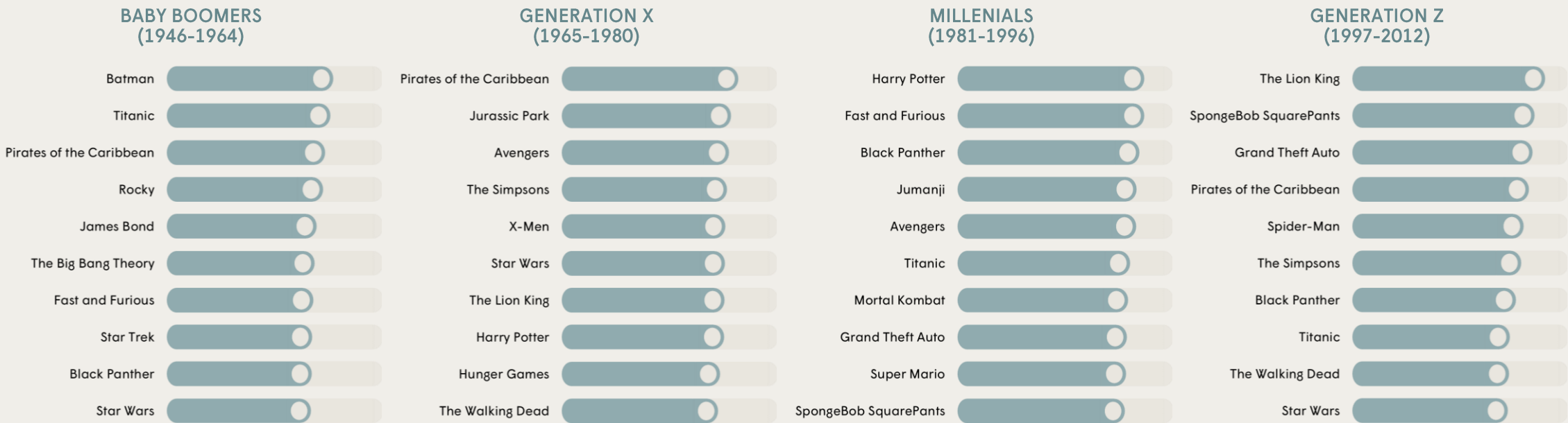


Strategic findings on intellectual properties



The ranking of the strongest intellectual properties varies greatly across generations.

Unsurprisingly, consumers have a different relationship to intellectual properties depending on their age group. However, some of the biggest intellectual properties manage to transcend generations and make it into the top 10, regardless of respondents’ age. This is the case of *The Lion King*, *Pirates of the Caribbean* and *Titanic*, all of which are in the top 10 for all generations.



n = Baby Boomers (1,467), Generation X (1,335), Millennials (1,461), Generation Z (786)

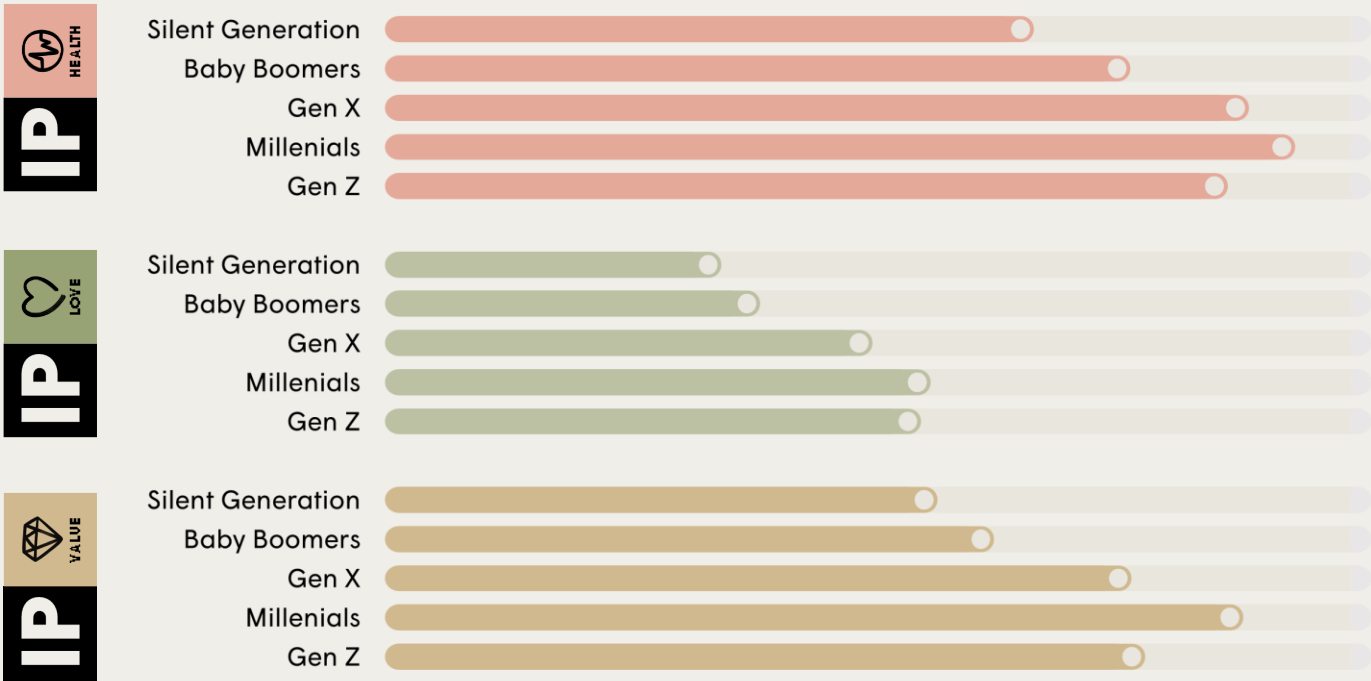
Millennials and Gen Z have the strongest attachment to intellectual properties.

Across all three aspects of the **Habo IP Index**, younger generations have a strong sense of attachment to intellectual properties and identify strongly with fans of the ones they love the most.

Having grown up in a technological age, they are much more exposed to IPs and identify with fan communities through social networks.

These generations are an important market segment in the entertainment, creative and licensing industry. Because of their attachment to certain intellectual properties, they show a stronger interest in consuming experiences based on them.

Habo IP Index by generation



IP Attachment

SILENT GENERATION

2 %
of fans of the intellectual properties tested

BABY BOOMERS

3 %
of fans of the intellectual properties tested

GEN X

11 %
of fans of the intellectual properties tested

MILLENNIALS

16 %
of fans of the intellectual properties tested

GEN Z

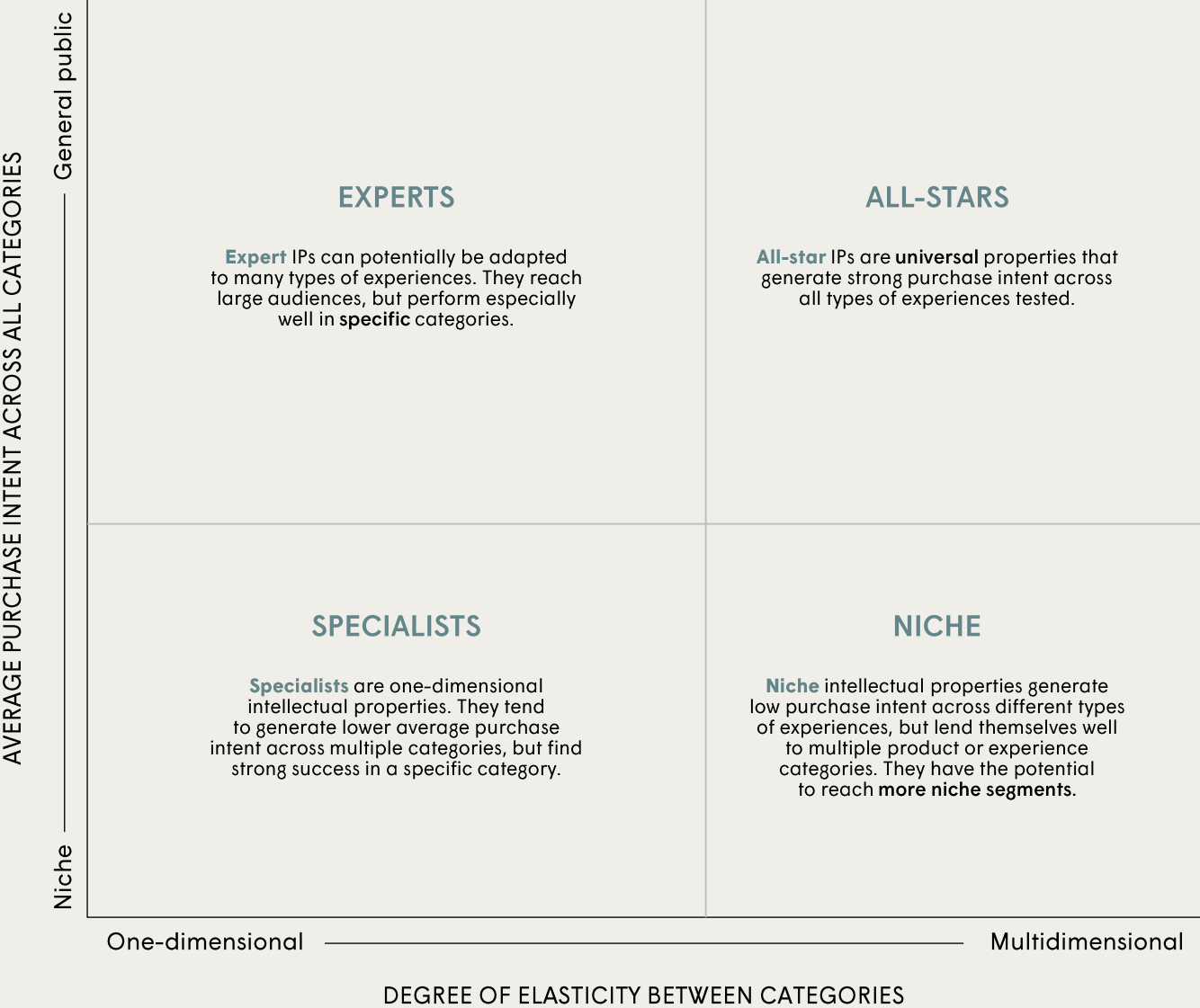
16 %
of fans of the intellectual properties tested

Not all intellectual properties have the same level of elasticity.

Almost all intellectual properties at the top of the **Habo IP Index** are multidimensional. They started out as a film or a book before branching out into other mediums.

However, the level of elasticity varies greatly from one IP to another. “Elasticity” refers to a property’s ability to generate consumer interest in many different categories—as a movie, a video game, a VR experience, a restaurant, a musical, etc.

it is a vital characteristic for IP owners. It measures a property’s ability to be monetized in different categories. For IP users, it gives an indication of the commercial potential of taking a title in one category and exploiting it in another (for example, creating a musical themed on a video game).



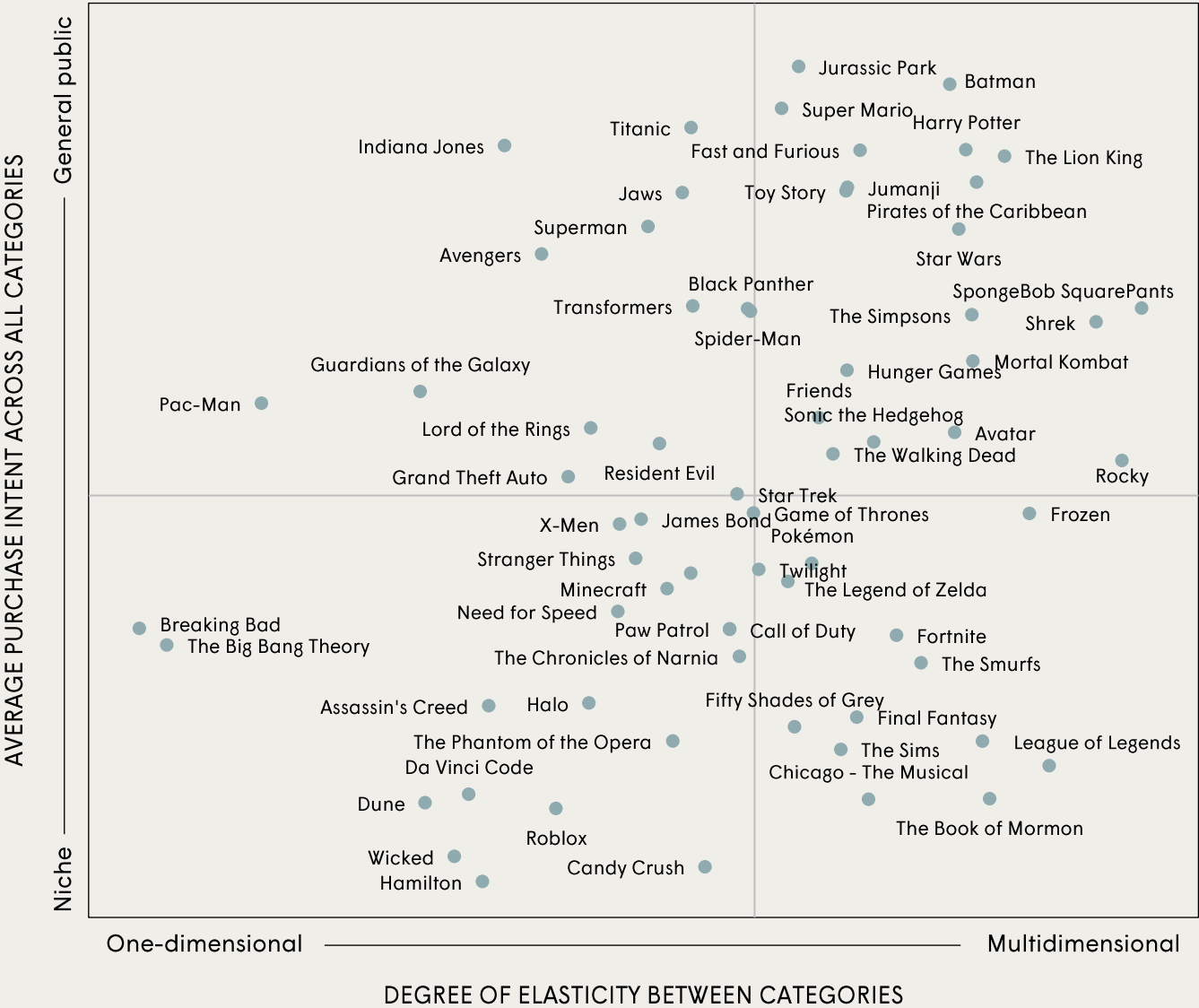
Not all intellectual properties have the same level of elasticity.

The elasticity of superheroes varies from one IP to another.

Superhero movies are known for drawing crowds to the theatre. When these titles are adapted into other types of experiences, some manage to generate a strong following. This is the case with *Batman* and *Black Panther*, which show great potential for elasticity. For example, purchase intent for a *Batman*-based VR experience is 61% higher than the average for the other intellectual properties tested. Conversely, the *Avengers* manage to generate interest primarily in the clothing and theme park categories.

TV series are struggling to diversify, especially in the streaming sector.

For streaming platforms, creating new IPs is a complex undertaking. Not only do they struggle to create brands that can last beyond a few seasons, but these properties also show a lower level of awareness. Examples include Netflix original series such as *Stranger Things* or *Breaking Bad*. They perform quite well for film adaptations, but overall target a more niche audience (see [page 36](#)).



Superheroes reign supreme.

The **Habo IP Index** shows Americans' strong interest in intellectual properties based on superheroes. With *Batman*, *Black Panther*, *Avengers*, and *Spider-Man* at the top of the rankings, superheroes represent 20% of the strongest IPs in 2022 (compared to a total of 9% of all IPs tested). In fact, when you look at the U.S. box office over the past few years, almost all of the weekly gross revenue peaks are associated with films from the Marvel or DC Comics universes.

Our elasticity index also shows that superheroes have the potential to be deployed in a wide variety of different experiences (such as VR experiences, theme or amusement parks, or even video games).

Superhero properties are closely followed by fantasy and science fiction films, and together, IPs based on one of these three genres account for 50% of the top 20.

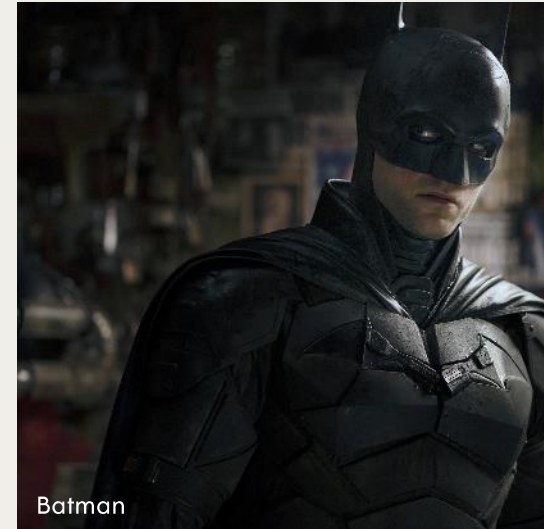


The impact of the lifecycle on the value of intellectual properties.

The value of intellectual properties is very sensitive to their lifecycle and topicality.

In 2022, *Batman*, *Pirates of the Caribbean*, *Fast and Furious* and *Black Panther* are at the top of the ranking. For most of them, the IP's strength derives from a recent or upcoming film release.

However, the fact that *Pirates of the Caribbean* in the top 3, even though the franchise's last film was in 2017, shows how sensitive consumers are to news about the film or its actors. The data for this study was collected in early May 2022, when the high-profile Johnny Depp trial was in full swing. The **Habo IP Index** rating for *Pirates of the Caribbean* probably reflects the support of Americans for the actor. Johnny Depp actually gained over 10 million Instagram followers since the trial began in April 2022.



Batman



Black Panther



Pirates of the Caribbean



Fast and Furious

Cinema as a catalyst for intellectual properties.

Cinema is the main catalyst for intellectual properties.

Intellectual properties that have already made their cinematic debut perform better with U.S. consumers and can be more easily adapted to different types of experiences.

With 61% of U.S. consumers going to the movies at least once a year and 74% having access to a paid streaming subscription, these mediums provide unique visibility to IPs.

Conversely, only 17% of Americans attend plays or musicals once a year. Titles that are predominantly exploited in this category, such as *Wicked* or *Hamilton*, are less popular because they just don't have the same traction as films.

Adventure video games are good material for movie adaptations.

According to our study results, 34% of U.S. consumers purchased a video game in 2021.

Sonic the Hedgehog and *Pokémon* are classic video game franchises and were very successful even before being adapted into movies and TV series. Although these IPs are known mainly for their video games, their film and TV adaptations have allowed them to reach a wider audience and gain in versatility. In 2022, *Sonic the Hedgehog 2* achieved record numbers and was the highest-grossing video game at the box office.

Among other things, these intellectual properties also have the potential to be developed as restaurants and bars as well as to make effective themes for attractions (amusement parks, family entertainment centres, etc.).



61 %
of U.S. consumers
go to the movies at
least once a year.



74 %
have access to
a paid streaming
subscription.

The complexity of developing a new intellectual property in a post-pandemic world.

Take the case of *Dune*, which was expected to be one of the new big box office franchises but ranks near the bottom of the list, in 67th place (see [page 38](#)).

Does that make it a weak intellectual property?
No, absolutely not.

On the contrary, *Dune* appears to be highly valued by consumers who are aware of it (affinity score of 6.7/10). However, only 50% of Americans have ever heard of it—well below the 79% average for other IPs tested.

Since this study shows that the cinema is the most powerful catalyst for intellectual properties, the return of consumers (or not) to movie theatres will be intimately linked to the evolution of the value of new franchises.

Intellectual properties are built up through the actors who embody them.

In addition to current events, the reputation of the actors who appear in movies and TV series also has a great impact on the strength of an IP.

In the case of *Pirates of the Caribbean*, more than 15% of study participants mentioned their attachment to Johnny Depp when expressing the reasons they enjoy the franchise.

Conversely, actors' reputations can also weaken an intellectual property. *Mission: Impossible* is a good example, as consumer opinions are mixed about Tom Cruise.

Note: Spontaneous mentions were collected in an open-ended question asking participants why they liked (or disliked) the intellectual property being measured.



Pirates of the Caribbean

15 %

of spontaneous mentions concerned Johnny Depp

100 %

of positive mentions among spontaneous mentions



Mission: Impossible

15 %

of spontaneous mentions concerned Tom Cruise

48 %

of positive mentions among spontaneous mentions



Jumanji

9 %

of spontaneous mentions concerned Robin Williams

100 %

of positive mentions among spontaneous mentions



Harry Potter

0 %

No spontaneous mention concerned Daniel Radcliffe

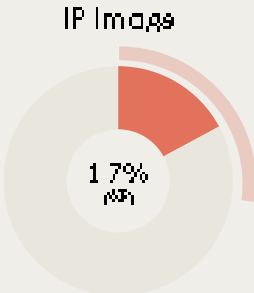
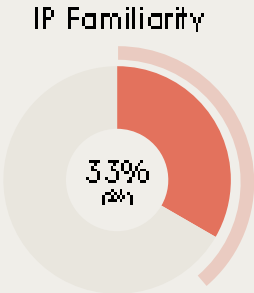
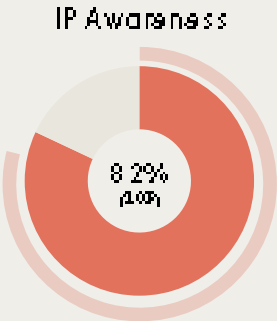
A few case studies

How to read the dashboards?

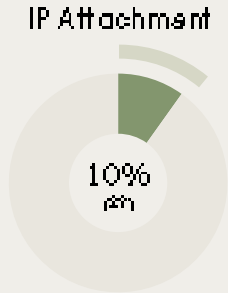
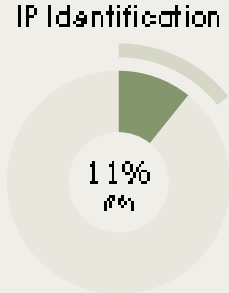
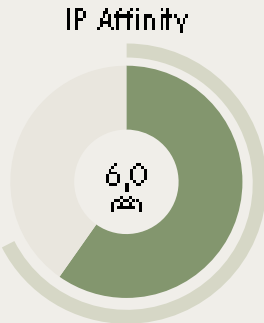
IP Awareness	82% of U.S. consumers are aware of this intellectual property, which is comparable to the average IP tested.
IP Familiarity	Among those who are aware of this IP, 33% are familiar or very familiar with it.
IP Image	17% of U.S. consumers strongly agree that this intellectual property has a positive image. Compared to the others studied, this IP is perceived by consumers as less popular and less successful.
IP Affinity	Compared to the other titles tested, this IP is less liked by U.S. consumers. They gave it an appreciation score of 6/10.
IP Identification	11% of U.S. consumers who are aware of this IP identify with its fans and feel a sense of community with other fans.
IP Attachment	10% of U.S. consumers who are aware of this IP consider themselves fans of it.
IP Potential	Compared to other IPs studied, the commercial potential of this IP is 28% lower based on average purchase intent, the average value of an experience built around this IP and the size of the potential market.
IP Elasticity	The higher the elasticity, the more potential the IP has to adapt to different types of experiences. With a score of 71%, this IP is close to average and can be adapted to several types of experiences with niche segments.

Note: The number in parentheses places each score relative to that of other intellectual properties tested, where 100 reflects the average. The rings on the outside of the circles are a visual representation of the average of all the IPs tested.

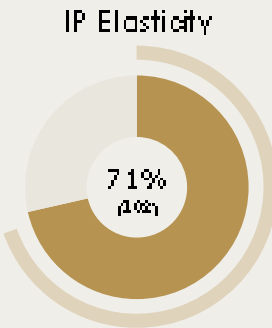
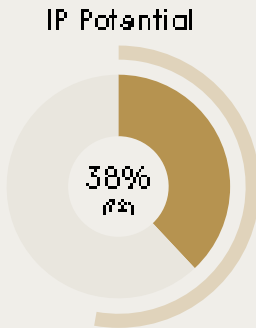
IP Health



IP Love



IP Value



The Lion King



There are many reasons for the strength of *The Lion King*. The property is ranked #1 and performs splendidly on every aspect of the **Habo IP Index**.

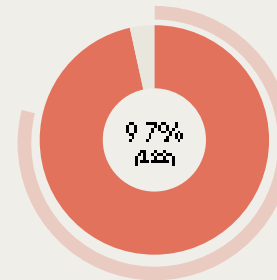
As a family classic, this IP is not only known by everyone, but is also the one with which consumers are most familiar.

Compared to the other IPs tested, *The Lion King* is more beloved by U.S. consumers and also has a larger fan base.

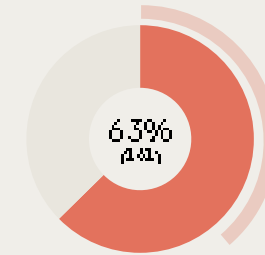
Unsurprisingly, this franchise also has fantastic commercial potential and elasticity. It is an IP that seems to appeal to everyone and can be easily adapted to a wide range of experiences.

IP Health

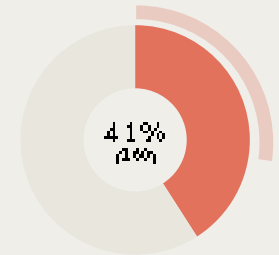
IP Awareness



IP Familiarity

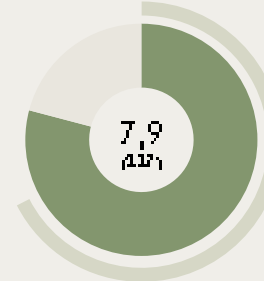


IP Image

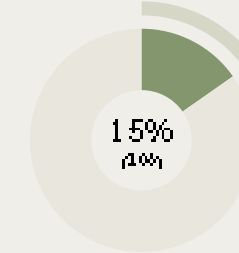


IP Love

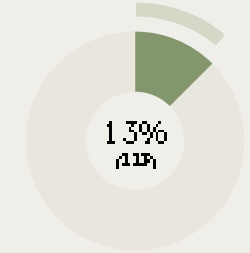
IP Affinity



IP Identification

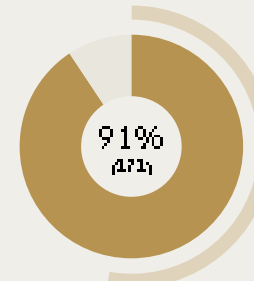


IP Attachment

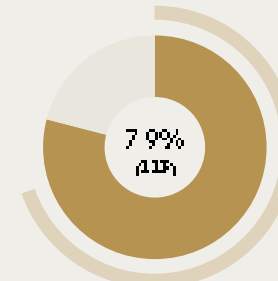


IP Value

IP Potential



IP Elasticity



Harry Potter

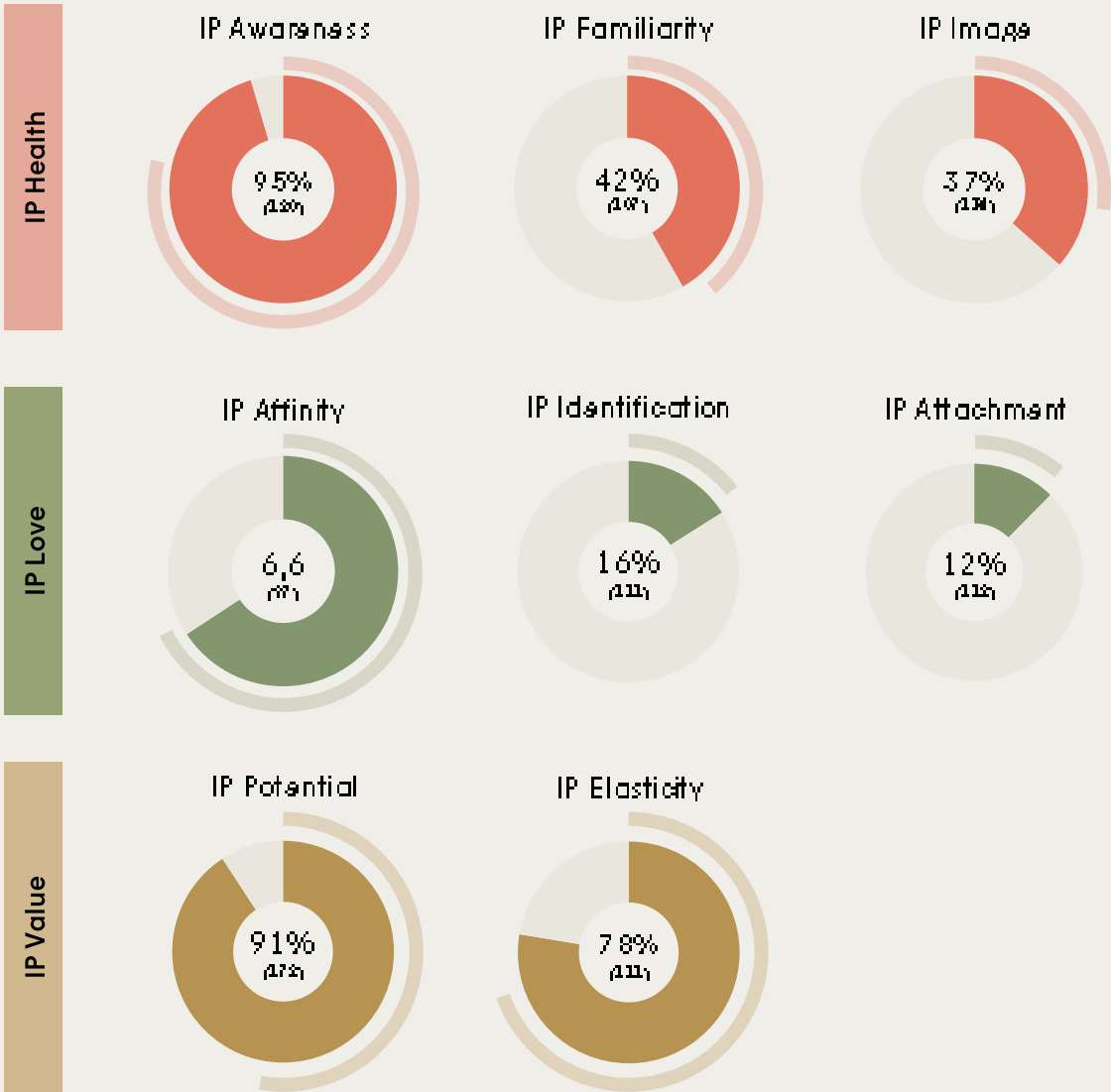


Ranked sixth, *Harry Potter* is a very strong intellectual property among American consumers.

This IP is close to average in terms of **IP Love**. However, it shows outsized performance in the **IP Health** and **IP Value** aspects.

Most consumers are familiar with *Harry Potter* and have a very positive perception of the title, a very strong interest in all types of experiences based on the title, and a willingness to pay a premium price.

Among other things, *Harry Potter* is very strong in terms of purchase intent for VR experiences, musicals, and restaurants or bars.



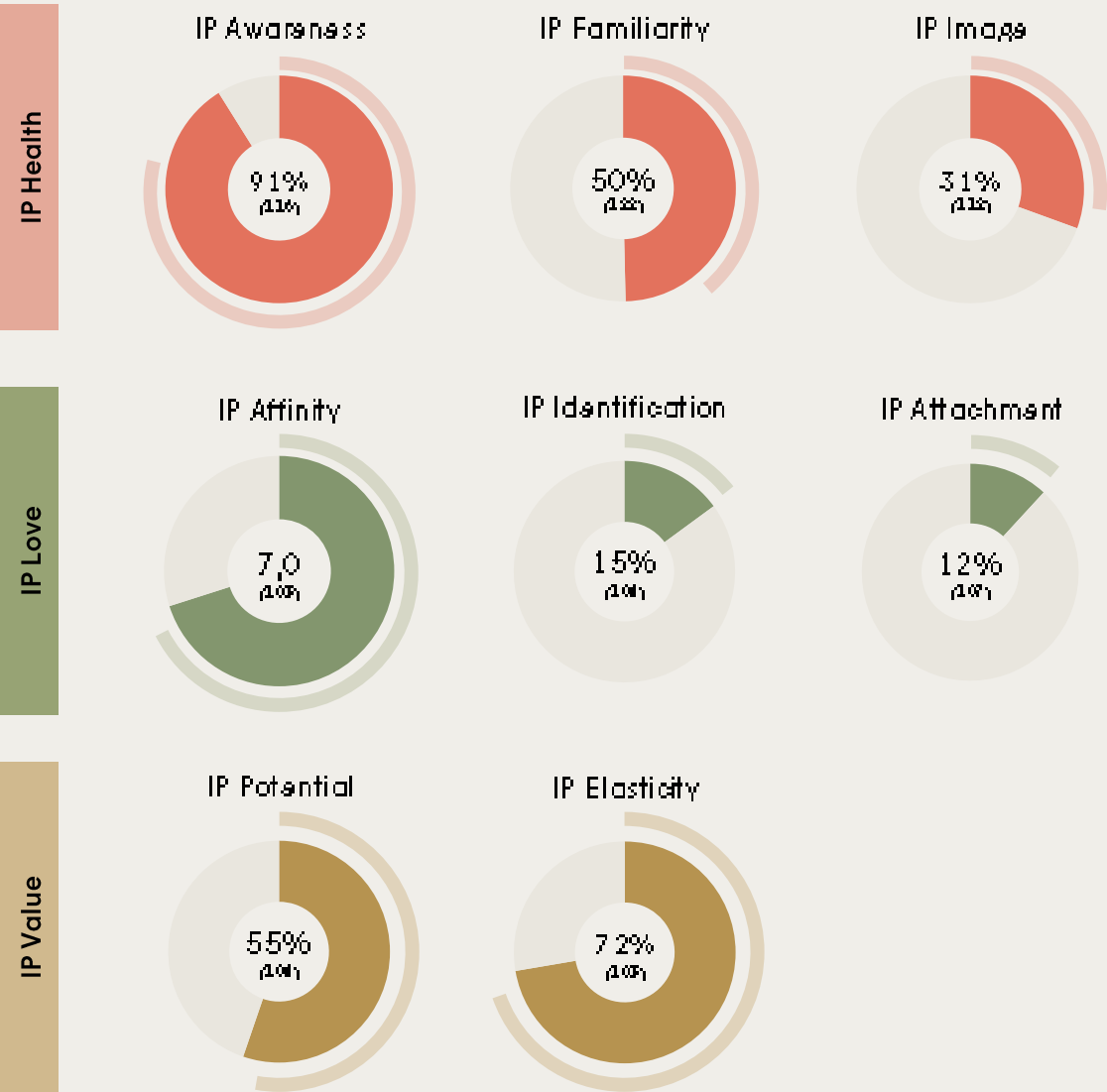
Friends



18 years after its finale, *Friends* remains one of the most popular series, with over 950,000 votes on IMDb as at May 2022. According to Parrot Analytics, demand for the original series increased by 49% following the airing of the *Friends: The Reunion* special in May 2021.

Needless to say, this series is well known by everyone, with 91% of American consumers familiar with it. However, it is ranked 23rd overall because of its proximity to the average of the other IPs tested in terms of **IP Love** and **IP Value**.

The strength of *Friends* lies in the fact that the series has the potential to appeal to a wide range of ages through different types of experiences (including restaurants and bars and VR experiences).



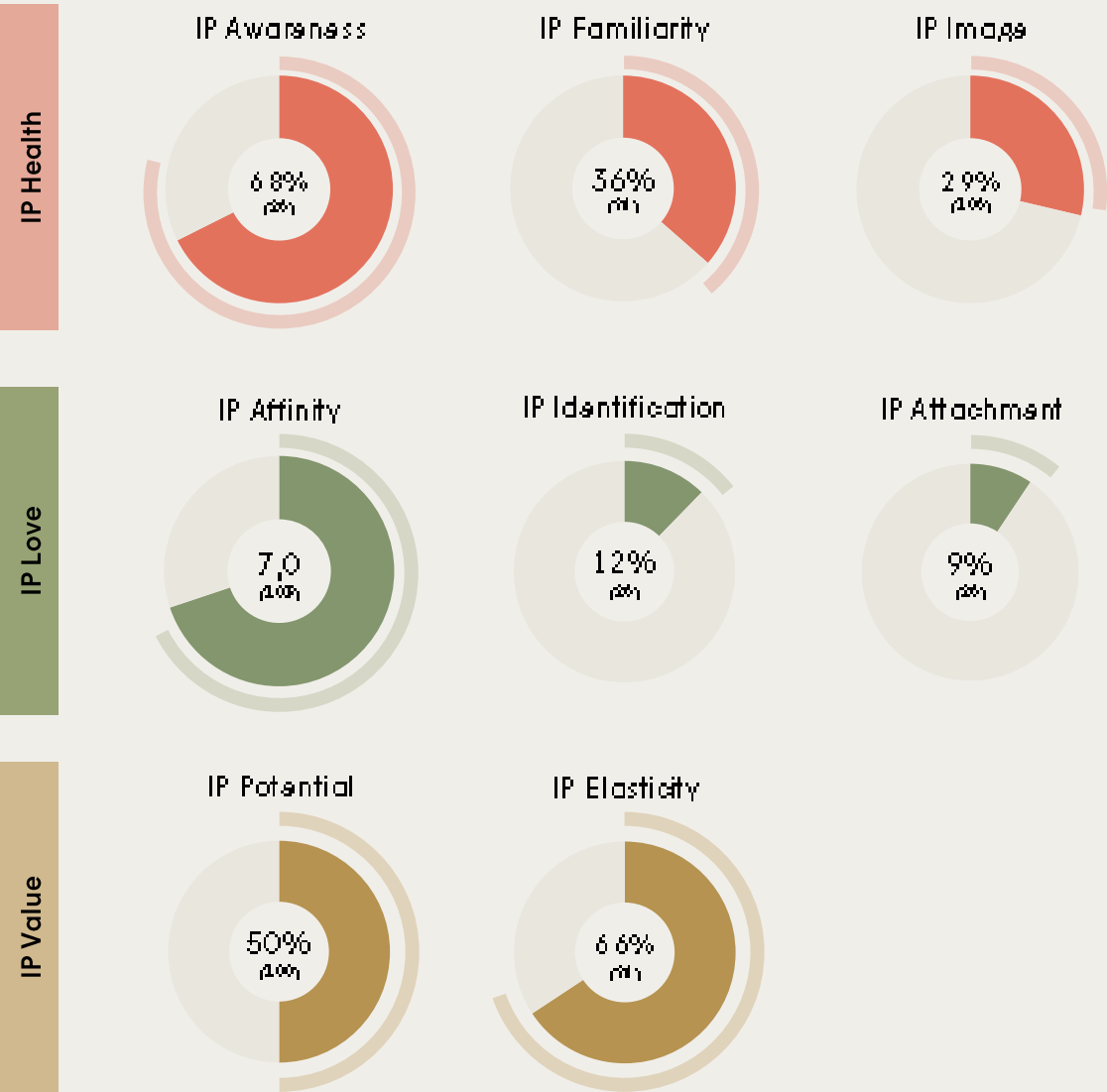
Stranger Things



With over 1 million votes on IMDb as of May 2022 and the recent launch of its fourth season on Netflix, *Stranger Things* is one of the most popular TV series right now.

While this IP seems to be strongly loved by those who do know it, people aren't as aware of it as the other titles tested.

Stranger Things has the potential to attract smaller segments of consumers through certain types of experiences (theme parks, museum exhibits), while also being able to attract the general public for specific categories of experiences or products (movie theatres, clothing lines).



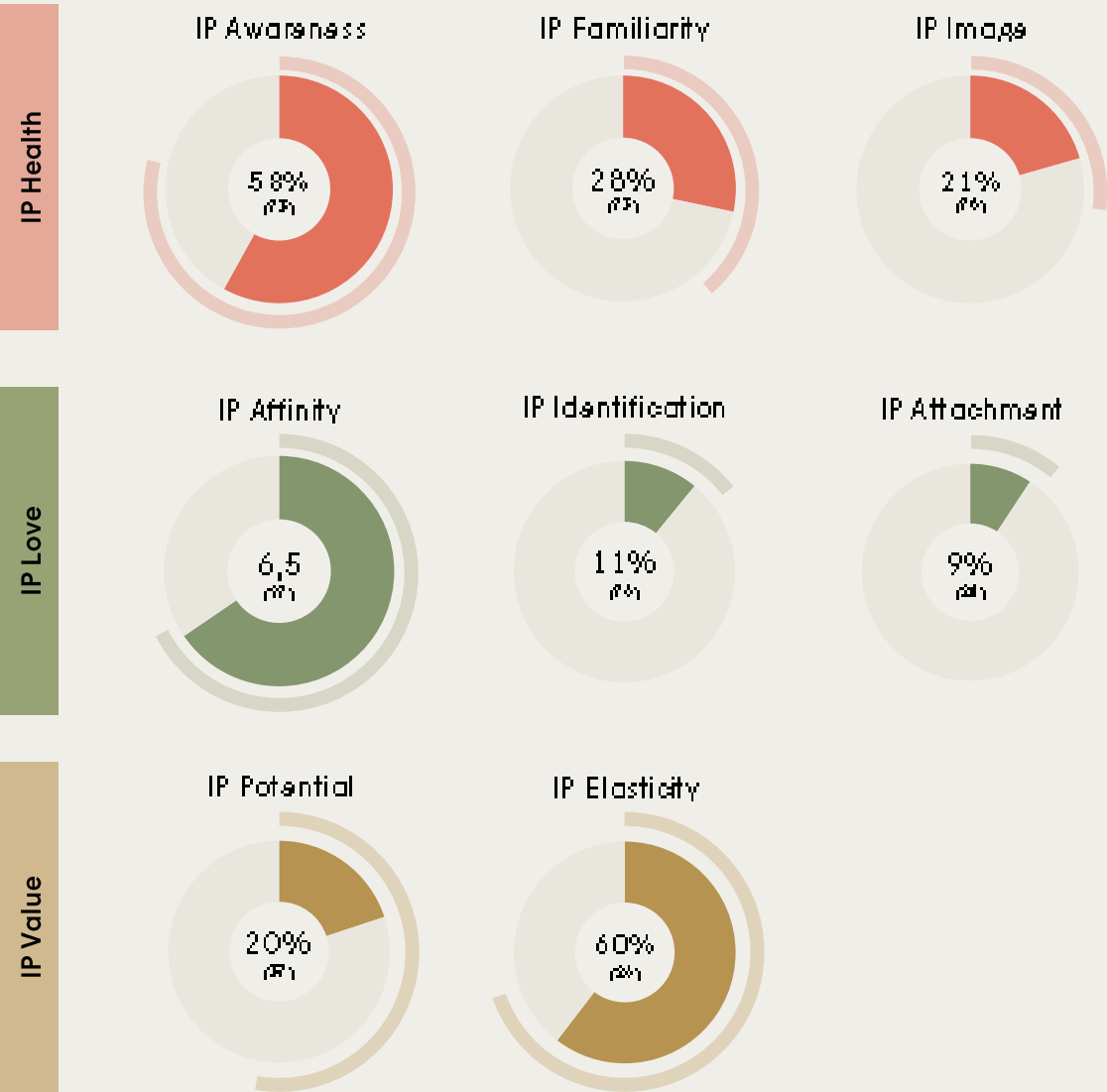
Assassin's Creed



In 2022, the franchise *Assassin's Creed* counted several millions of monthly active users, whereas *Assassin's Creed Valhalla* surpassed \$1 billion in revenues, making it the series' most lucrative release to this date. Although known by 77% of video game consumers, this IP does not perform as well with the general public as the other IPs tested.

Ranked 65th in the **Habo IP Index**, *Assassin's Creed* underperforms in the three aspects studied. Among the general public, only 58% of U.S. consumers are aware of video gaming, and even those aware of it don't feel particularly emotionally attached to it.

The *Assassin's Creed* franchise generates lower purchase intent across all experience types than the average intellectual property tested. This IP, like most of the video games tested in this study, has the potential to attract a more niche audience.



Cocomelon

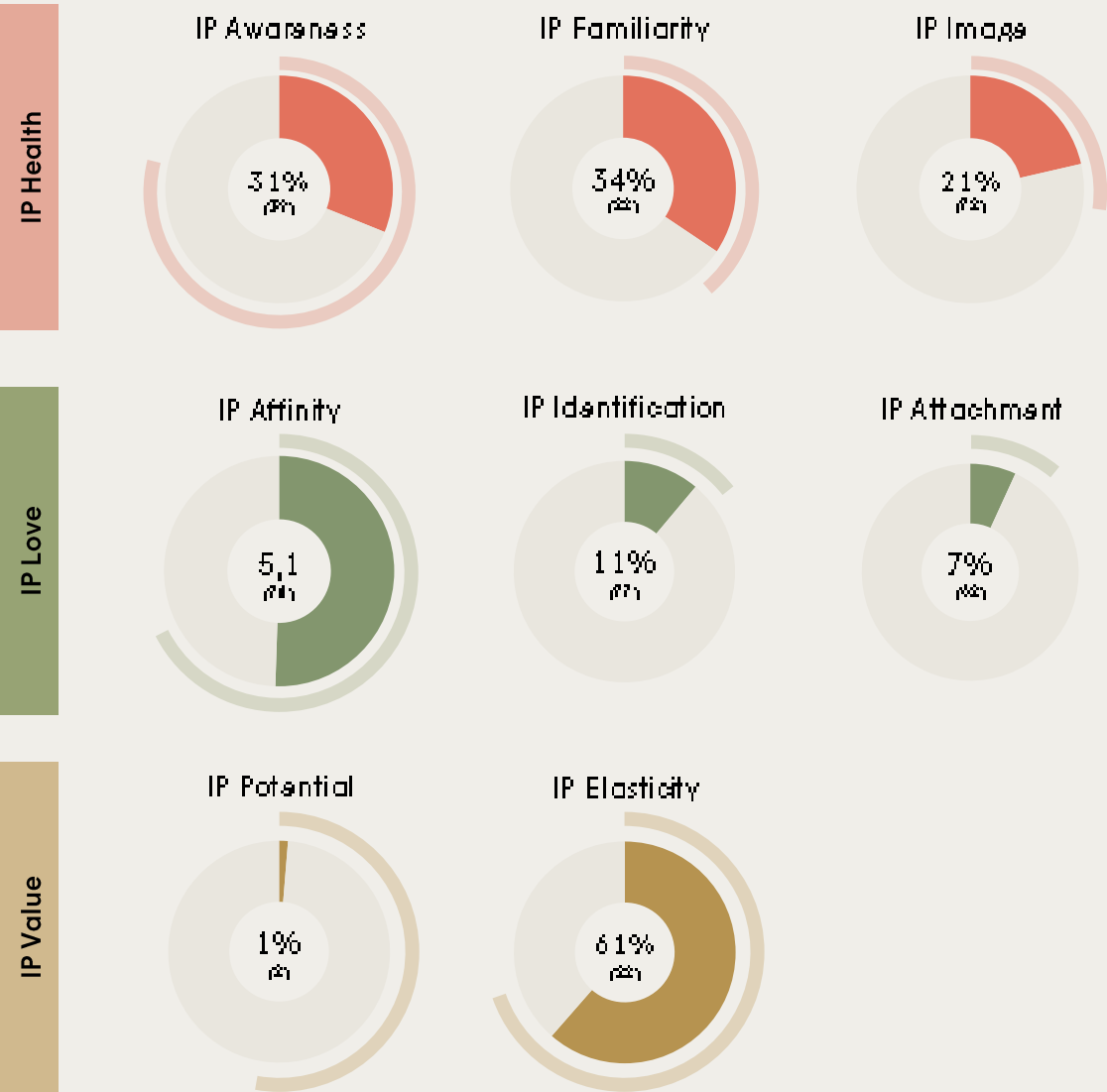


Cocomelon is the lowest-performing IP on all three **Habo IP Index** dimensions among all the IPs measured in this study.

As a TV series for young children, this IP is aimed at a much more niche segment, with only 31% of consumers aware of it. However, this lack of awareness isn't the only reason for its low score.

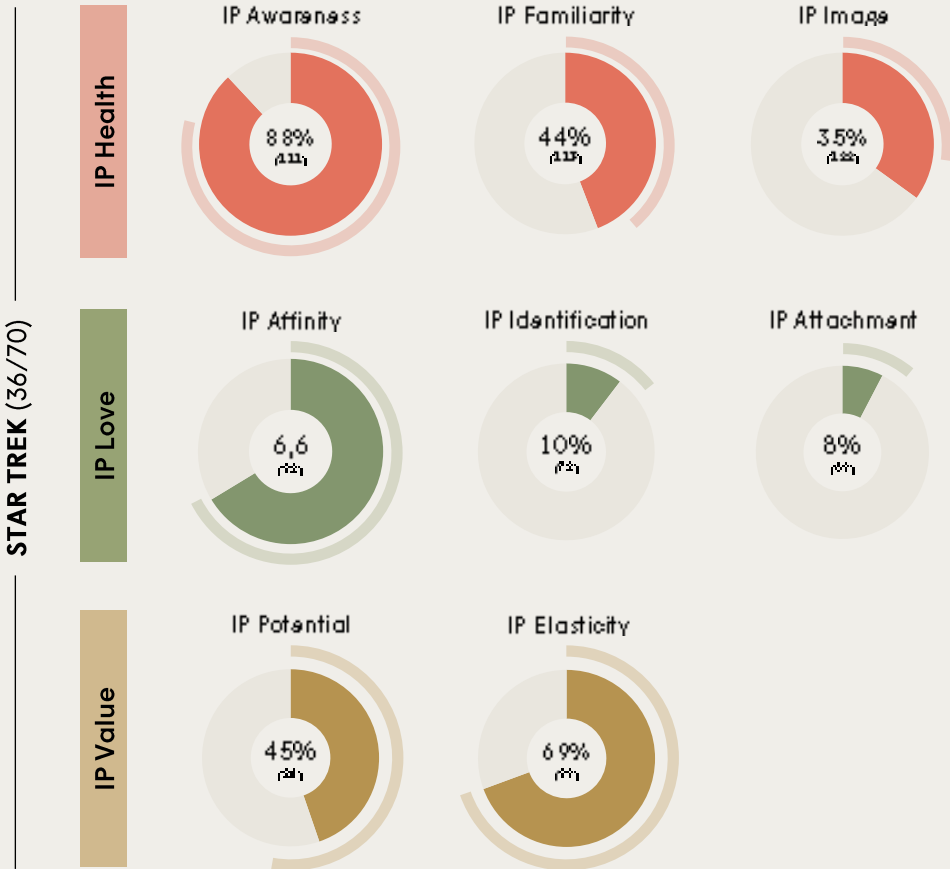
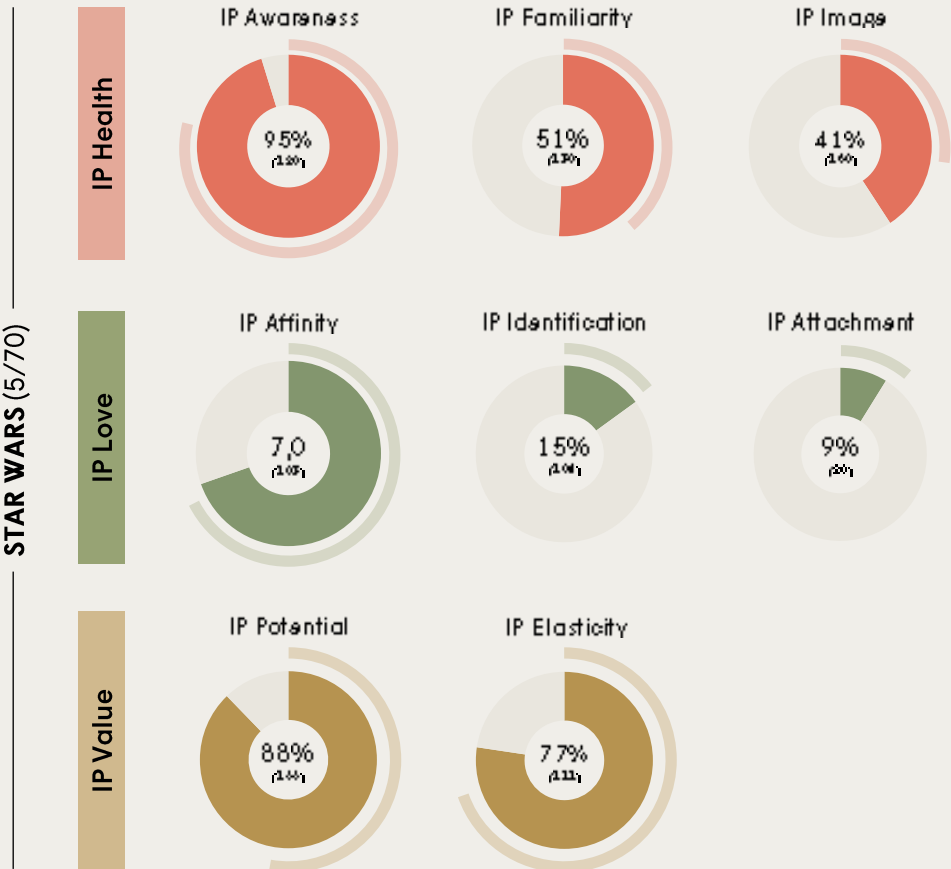
The **IP Love** aspect shows that those who are aware of this intellectual property don't have much affinity towards it and don't feel particularly attached to it. Of course, the results would probably look very different if the study had been conducted with young children.

Compared to the other properties tested, Cocomelon has low commercial potential across all types of experiences tested.



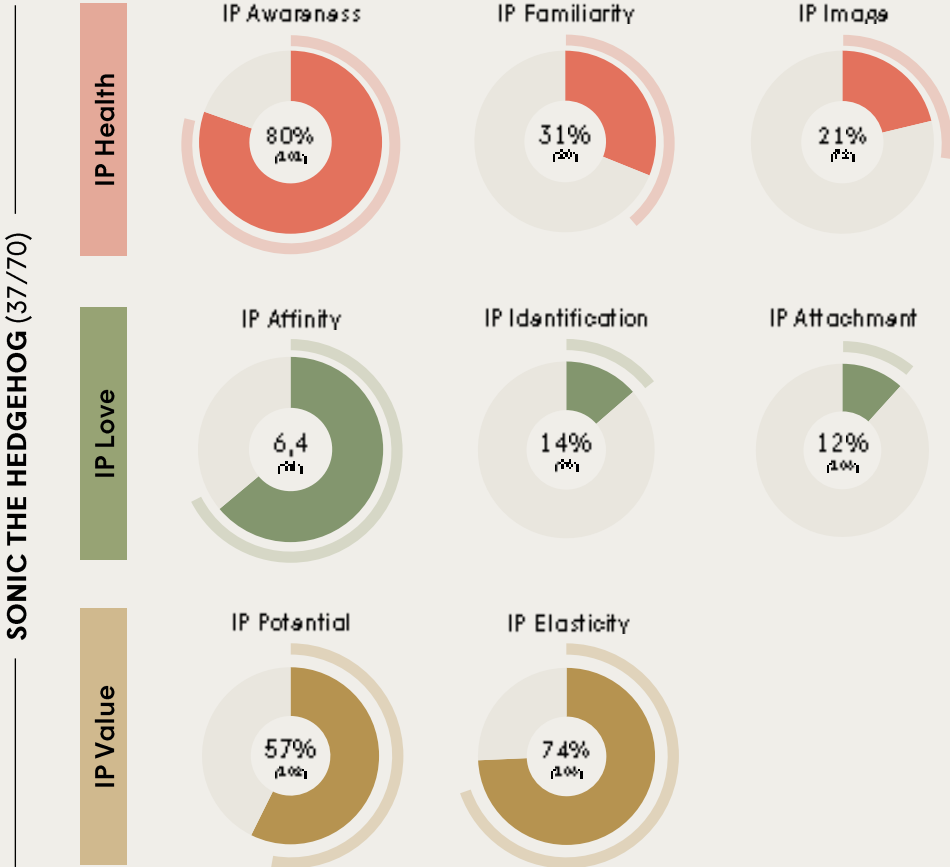
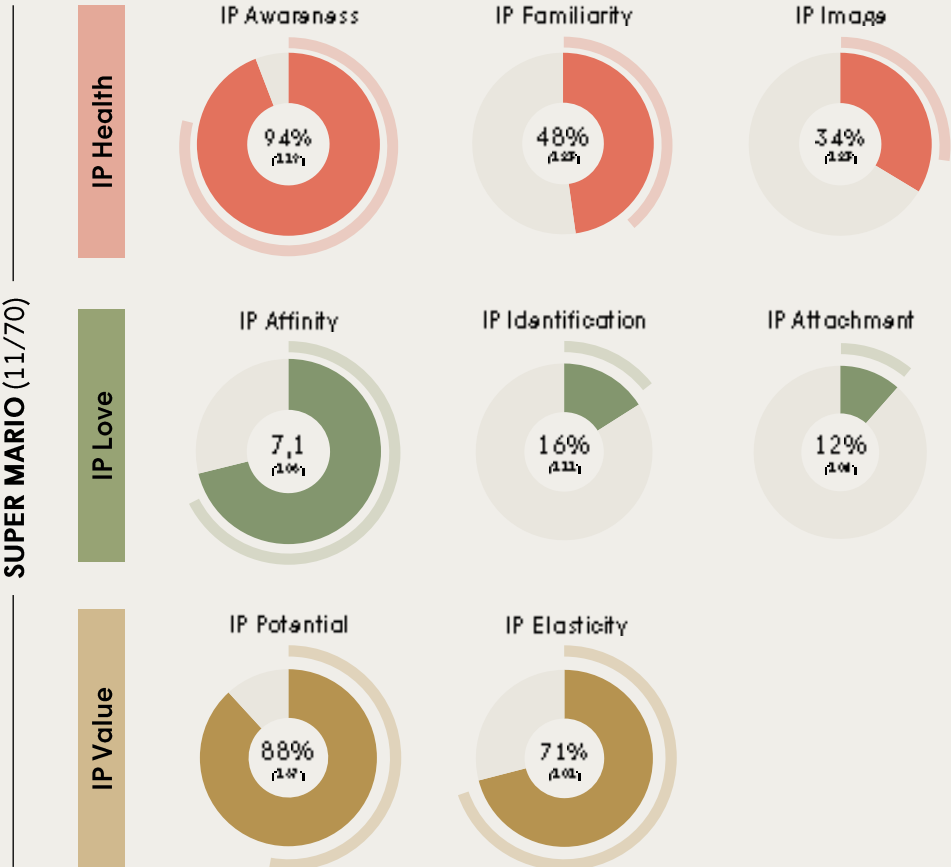
Star Wars vs. Star Trek

Star Trek and Star Wars are both intellectual properties that are well known to the public, but they don't generate the same level of excitement for two reasons. First, *Star Wars* fans seem to be more attached to the IP and its community. Second, *Star Wars* seems to be easily adaptable to a wide range of experiences, while *Star Trek* seems to find great success in specific types of experiences, such as exhibitions and film adaptations.



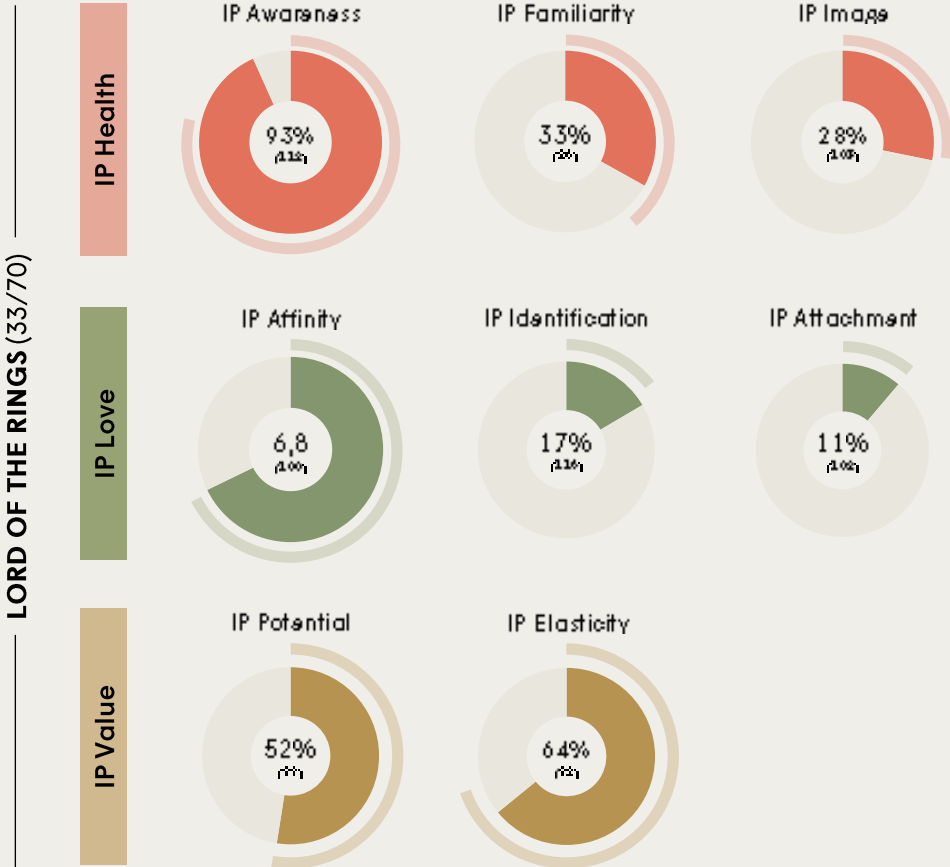
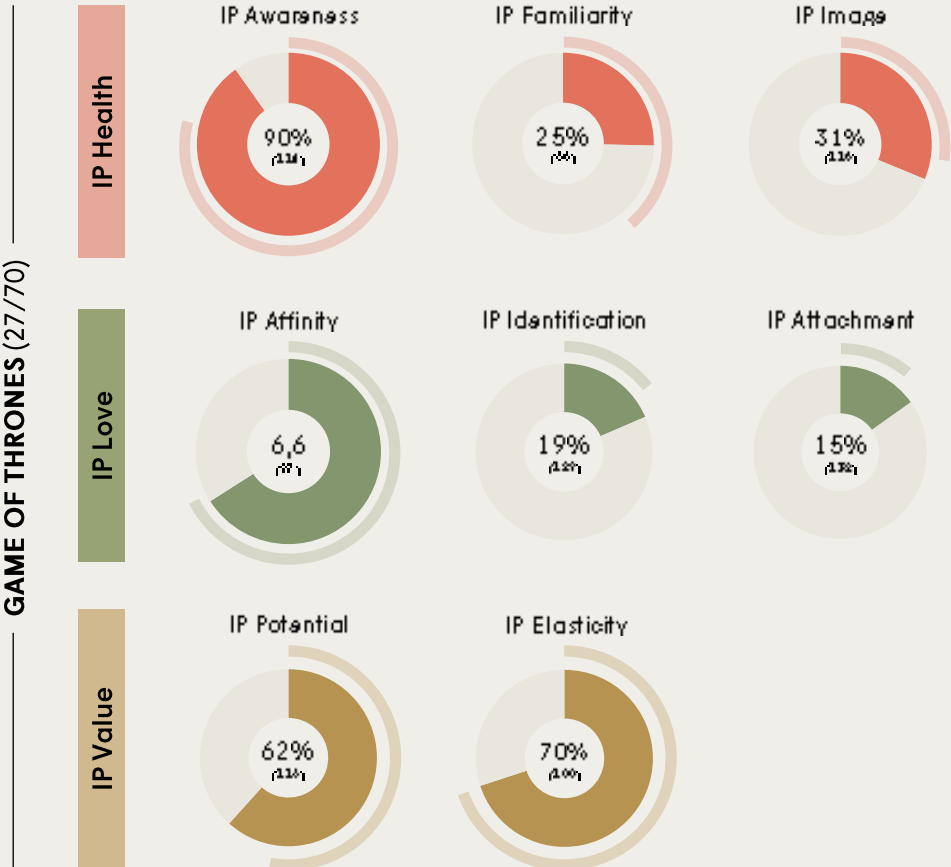
Super Mario vs. Sonic the Hedgehog

IP Health and IP Value are the key aspects that explain the difference between *Sonic the Hedgehog* and *Super Mario*. While *Super Mario* is among the most well-known, beloved and appealing intellectual properties, *Sonic the Hedgehog* is less familiar to U.S. consumers and generates a more neutral image. In terms of **IP Value**, the latter generates high interest through several types of experiences, but doesn't represent the same commercial potential as *Super Mario*.



Games of Thrones vs. Lord of the Rings

Ranking 27th and 33rd respectively, *Games of Thrones* and *Lord of the Rings* are differentiated through the aspects of IP Love and IP Value. *Games of Thrones* appears to have a larger engaged fan base and performs better than the average IP tested in terms of commercial potential. Conversely, the engagement and commercial potential of *Lord of the Rings* are closer to the average IP tested.



A few words about Habo



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A strategic studio for the creative and entertainment industries

Habo is a strategic studio that assists organizations with strategic planning and strategic intelligence. Our mission is to help our clients achieve business and creative success by applying data-based, scientific, and strategic approaches to the art of the industry. Using comprehensive data and strategies derived from the best practices in the industry, we help our clients evolve in an ever-changing marketplace.

Our team boasts a rich diversity of thought processes and skills. It is a place where marketing and finance meet; where we bridge the gap between a client's point of view and their business model.

We've worked with organizations and brands around the world on everything from theme parks to video games, Broadway musicals, movies, mixed-reality experience, and Family Entertainment Centres.

Keen insight into intellectual properties and how to create value from them

Through our work, we've developed extensive experience in intellectual properties. We help IP owners develop and monetize their assets, and we support creators, producers and brands in the optimal use of IPs.



Detailed methodology



The Habo IP Index: a cross-sectional study among over 5,300 Americans

- **Representativeness of the results:** Quotas were implemented to obtain data representative of the U.S. population on the basis of age and gender of participants.
 - **Number of participants:** More than 5,300 people aged 18 and over and residing in the U.S.
 - **Data collection period:** May 6 to 13, 2022.
 - **Margin of error:** This research was conducted with a panel and therefore did not involve probability sampling. However, if the sample were probabilistic, the margin of error would be +/- 1.3%.
-

Selection of intellectual properties for this study

A total of 70 intellectual properties from film, television, video games, books and musicals were selected based on indicators of their performance (see details on [page 6](#)).

Process for evaluating intellectual properties

- Each participant was exposed to a total of four intellectual properties from the 70 under study.
 - In total, each intellectual property was evaluated by 300 respondents.
 - Intellectual properties were evaluated through 12 components that define their strength.
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Contacts

Florent Bayle-Labouré
Co-founder and Partner
fbl@habo.studio

Joëlle Masse
Senior Analyst, Marketing Intelligence
jm@habo.studio

<https://habo.studio>

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