



CONSUMER NAVIGATOR OCTOBER 2024

Entertainment: Gaming, Sports & Anime

INNOVATING TO IMPACT

dentsu

About this study

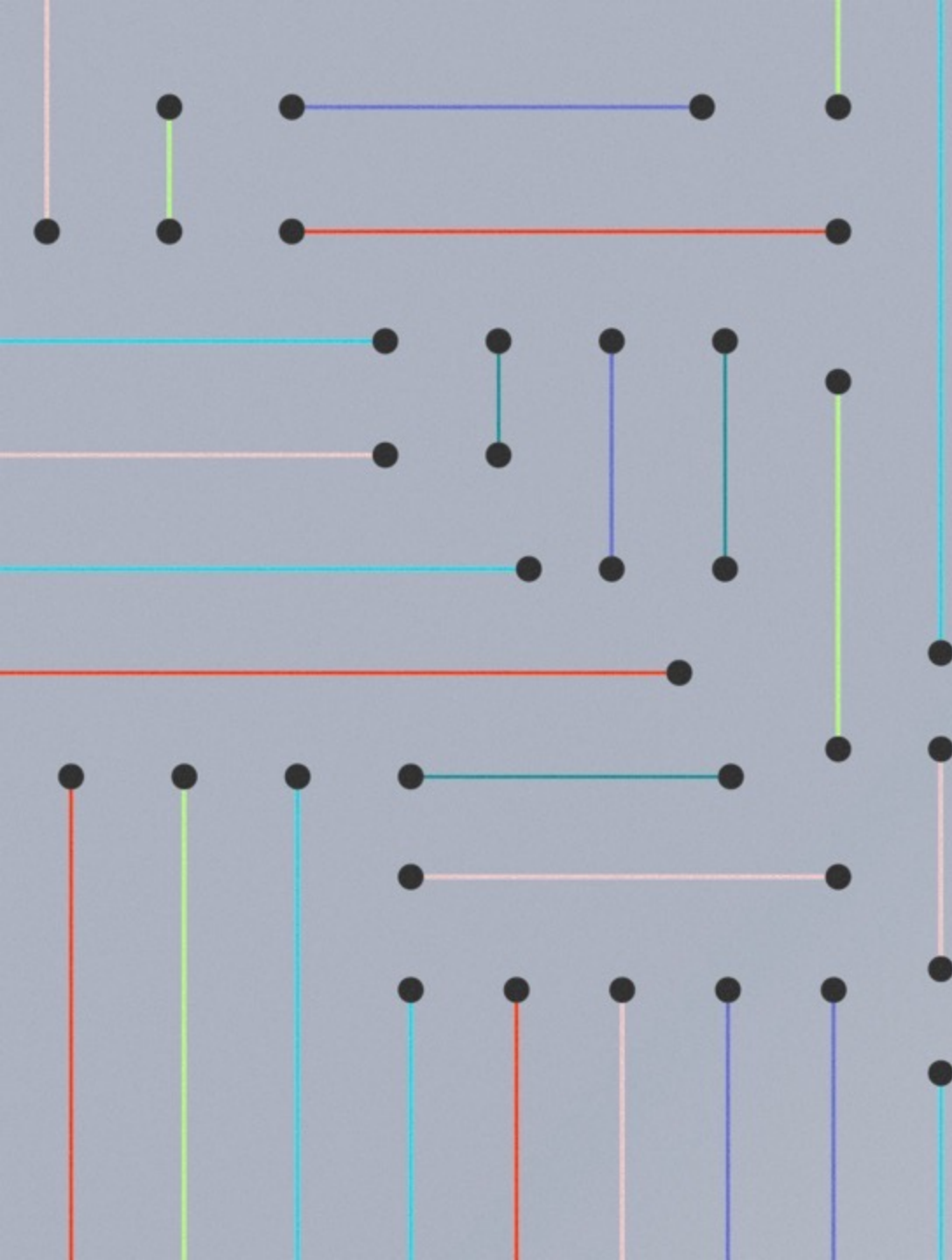
The survey was conducted by dentsu via Toluna, an online research panel.

Administered on September 27th, 2024.

Distributed among a random sample of 1,000 U.S. respondents 18 years of age or older.

Controls for nationally representative weighting across age, gender, region, race and ethnicity (using the latest publicly available U.S. Census numbers)



An abstract graphic on the left side of the slide. It features a light blue background with a grid of black dots. Colored lines (red, green, blue, cyan, pink) connect some of these dots, forming a network of horizontal, vertical, and diagonal paths. The lines vary in color and thickness, creating a complex, interconnected pattern.

Contents

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2. Gaming Is Blurring Media Lines
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Top Consumer Insights

Gaming is becoming a central hub where fandoms collide.

69% of anime fans and 53% of sports fans log into their favorite games daily, illustrating how gaming has become an essential social and cultural activity for diverse fan identities. Our survey underscores gaming's growing role as not just an entertainment activity but a unifying force in broader pop culture.

Gaming is an arena for self-expression and identity exploration.

The fact that 81% of Millennial gamers use gaming to express themselves and 88% embrace it as a space for identity experimentation reflects a broader shift towards digital worlds as the primary spaces in which people explore identity; often in ways that mirror, but also depart from, identity exploration in real life.

Sports docuseries hold surprising cross-fandom appeal.

87% of anime fans and 68% of gamers have watched a sports docuseries in the past month in an unexpected yet telling sign of how sports content is breaking out of its traditional niche. Sports narratives are becoming a form of storytelling that appeals to diverse audiences far beyond diehard sports fans.

Athletes lead the way on personality-driven media shift.

50% of sports fans seek out athlete content weekly, with younger fans leading the charge. Athletes are no longer just players in the game—they are fully-fledged public figures whose off-field lives and personal stories are just as captivating to fans as their on-field performance.

Anime is gaining mainstream popularity in the US.

Anime is no longer a niche, but a significant force influencing mainstream entertainment in the US. 58% of the general population reports tuning into anime at least once a year. Once again, our survey finds that fandoms such as sports and gaming that were once siloed are now converging around anime.

Streaming platforms are driving the US anime boom.

With 82% of anime fans subscribing to Netflix specifically for anime content, and other platforms like Hulu and Disney+ also playing pivotal roles, anime is becoming a major draw for some of the biggest streaming services. While these platforms have been traditionally associated with Western media, they are evolving to meet demand.

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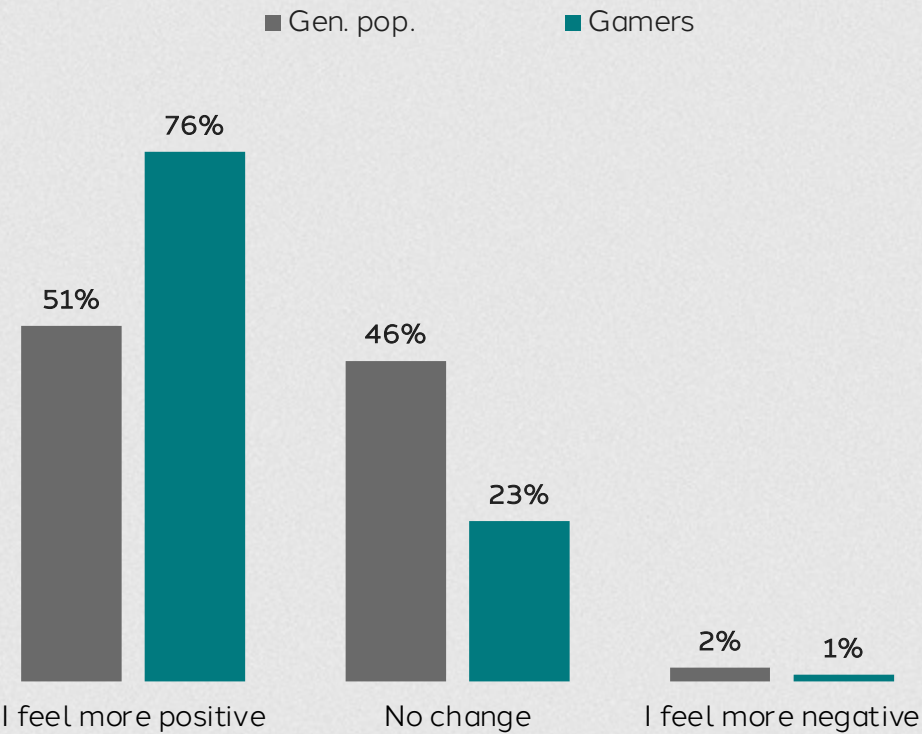
Gaming Is Blurring Media Lines



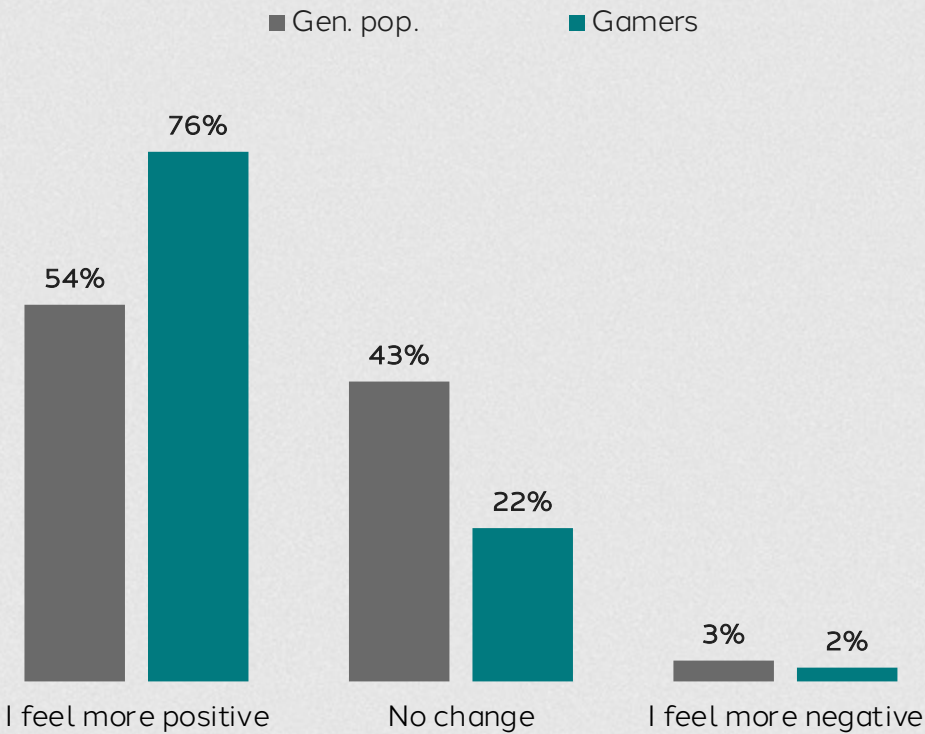
Transmedia IP is gaining broader appeal beyond gamers.

A resounding 76% of gamers report feeling more positive about entertainment franchises that expand into video games, and an equal percentage are favorable about video games adapted into entertainment content. Enthusiasm is broader than just gamers, with 51% of total respondents feeling favorable about entertainment franchises expanding into gaming, and 54% feeling favorable about game-based entertainment.

When an entertainment franchise expands into video games, how does it affect your feelings about the franchise?

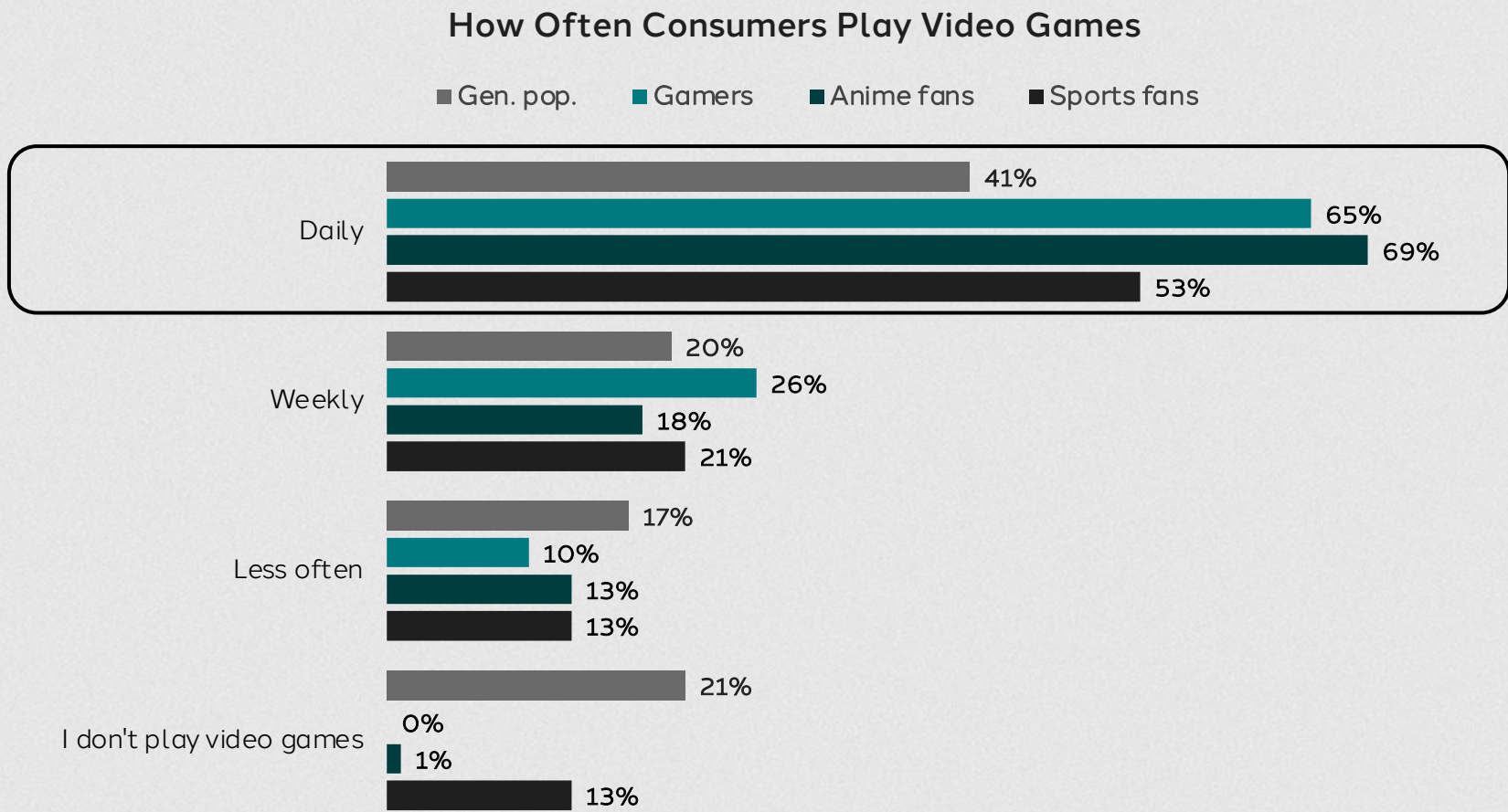


When a video game is adapted into entertainment content, how does it affect your feelings about the franchise?



Entertainment fandoms collide: Gaming spans Anime & Sports fans.

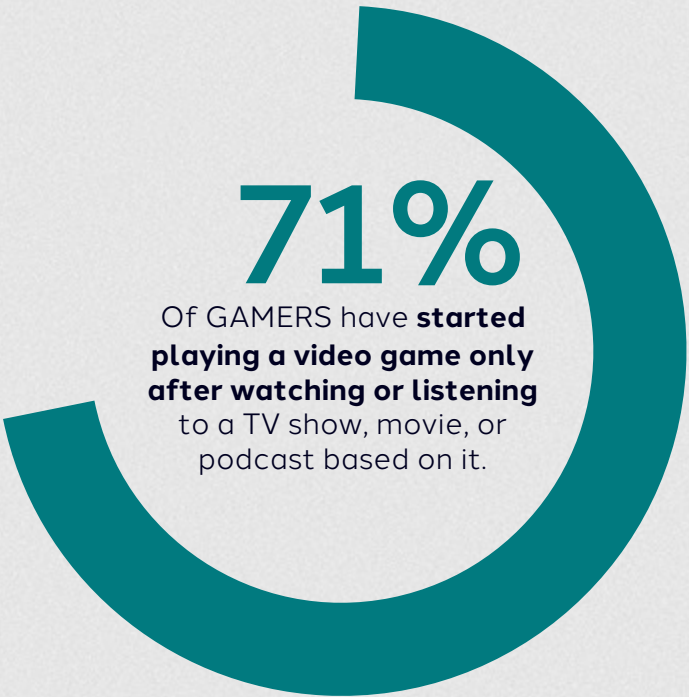
Gaming is where entertainment fandoms intersect, with daily play becoming a staple of fan culture. Our survey shows that 69% of anime fans are logging into their favorite games every day, while 53% of sports fans are just as committed to daily gaming sessions.



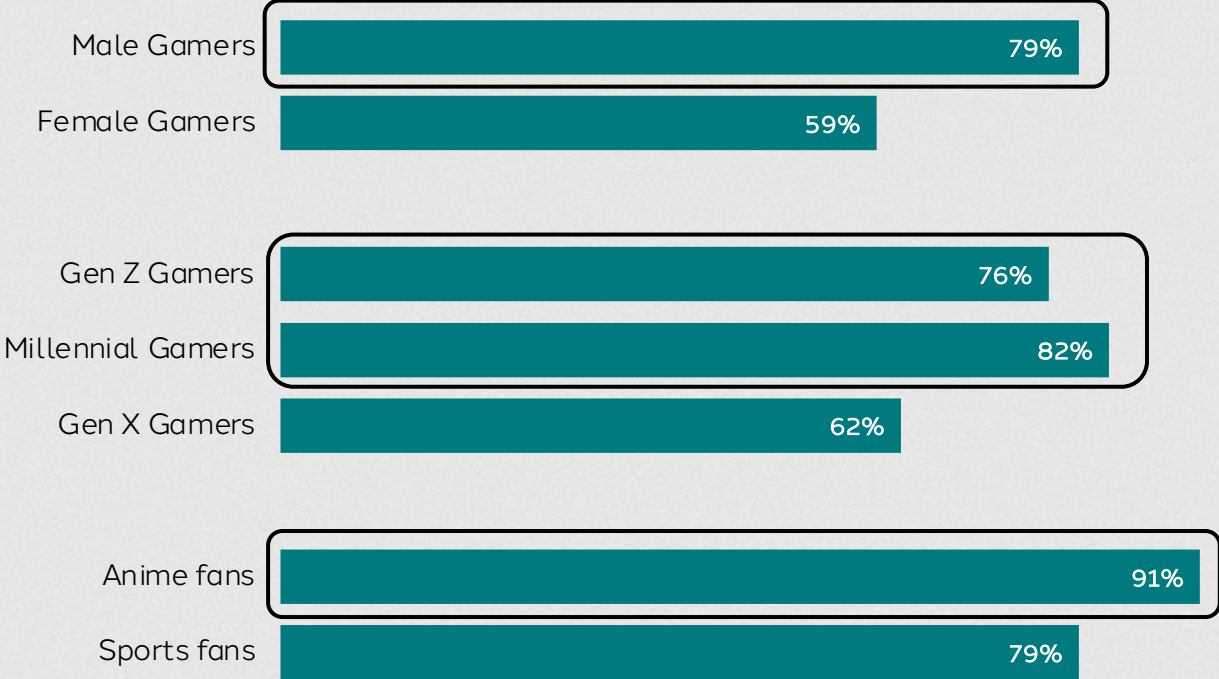
Entertainment content fuels video game discovery.

Our survey reveals a powerful connection between entertainment content and video game discovery. An impressive 71% of gamers reported they’ve started playing a game only after watching or listening to related TV shows, movies, or podcasts. Certain demographics are even more influenced by this crossover.

Discovering Video Games Via Entertainment Content



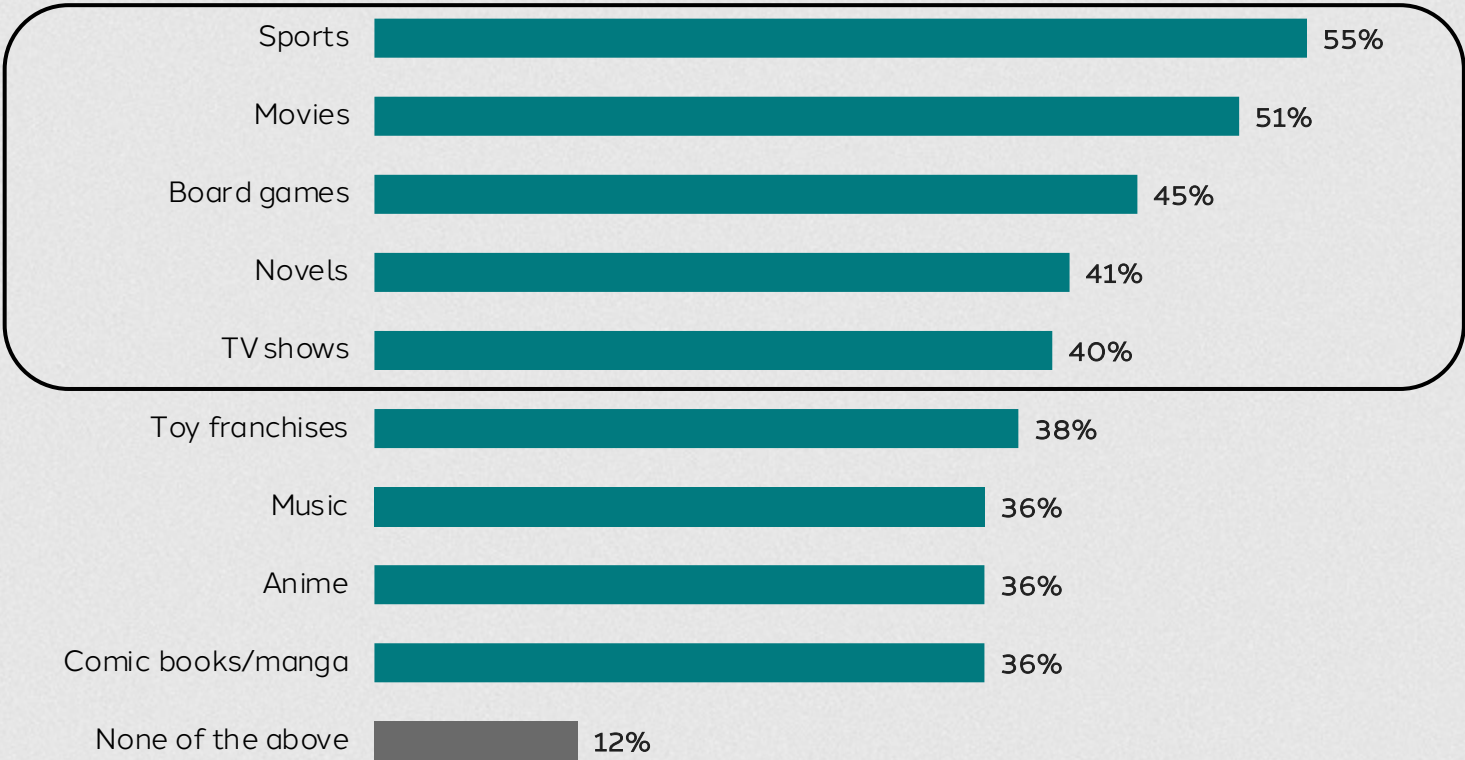
% of GAMERS Who Have Discovered a Video Game Via Entertainment Content



Gamers embrace virtual worlds inspired by their favorite entertainment.

A variety of media drives gaming choices. Sports reign supreme, with 55% of gamers playing video games rooted in real-life athletics. Movie-based games aren't far behind at 51%, while classic board games and novels are also inspiring digital adventures. TV shows round out the top five, underscoring how entertainment IP is branching into interactive experiences.

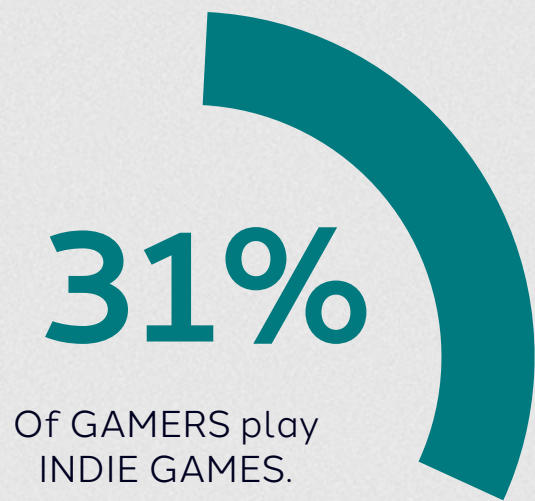
Types of Entertainment Regularly Played Video Games Are Based On



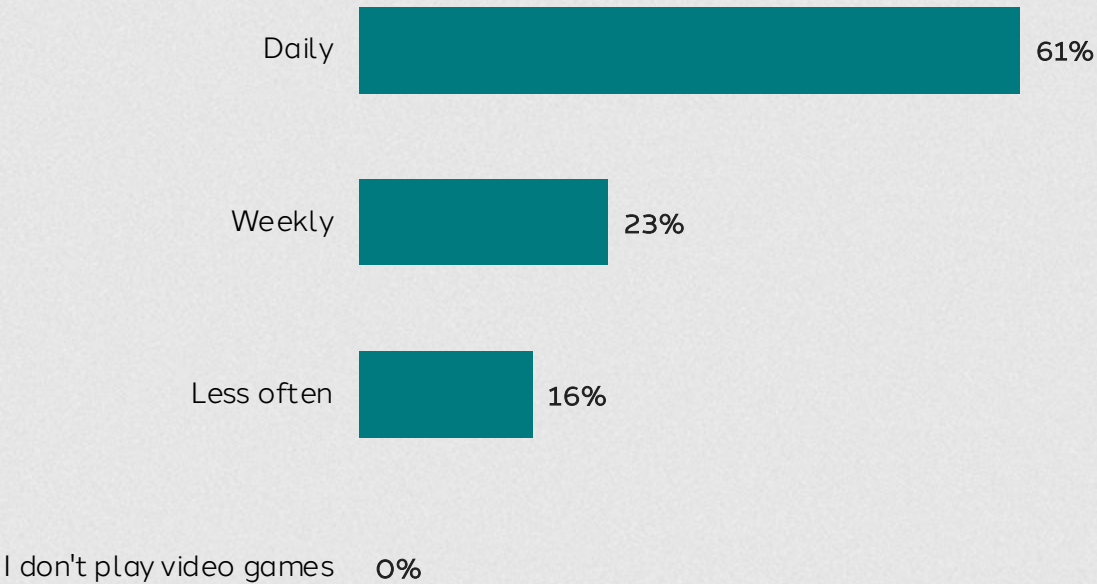
For many gamers, “indie” games provide an alternative ritual.

Indie games are carving out a dedicated fanbase, with 31% of gamers opting for these niche experiences over the gloss of AAA titles. Of those indie players, 61% play (any) video games daily.

Playing “Indie” Games



How Often Indie Players Play (Any) Video Games



Indie players find joy in the weird and wonderful.

Indie players are drawn to the unique "weirdness" and "creativity" that indie developers bring to their craft—qualities they find lacking in mainstream games. Supporting these developers is another key motivator, with players viewing them as the "mom & pop shops" of the gaming world. This mindset speaks to a growing desire for authenticity, quirkiness, and intimate connections within gaming.

Why do you prefer to play “indie games” over AAA/blockbuster video games?



“

I like that they can be weird and creative because they are not trying to fit a mass appeal market.

”

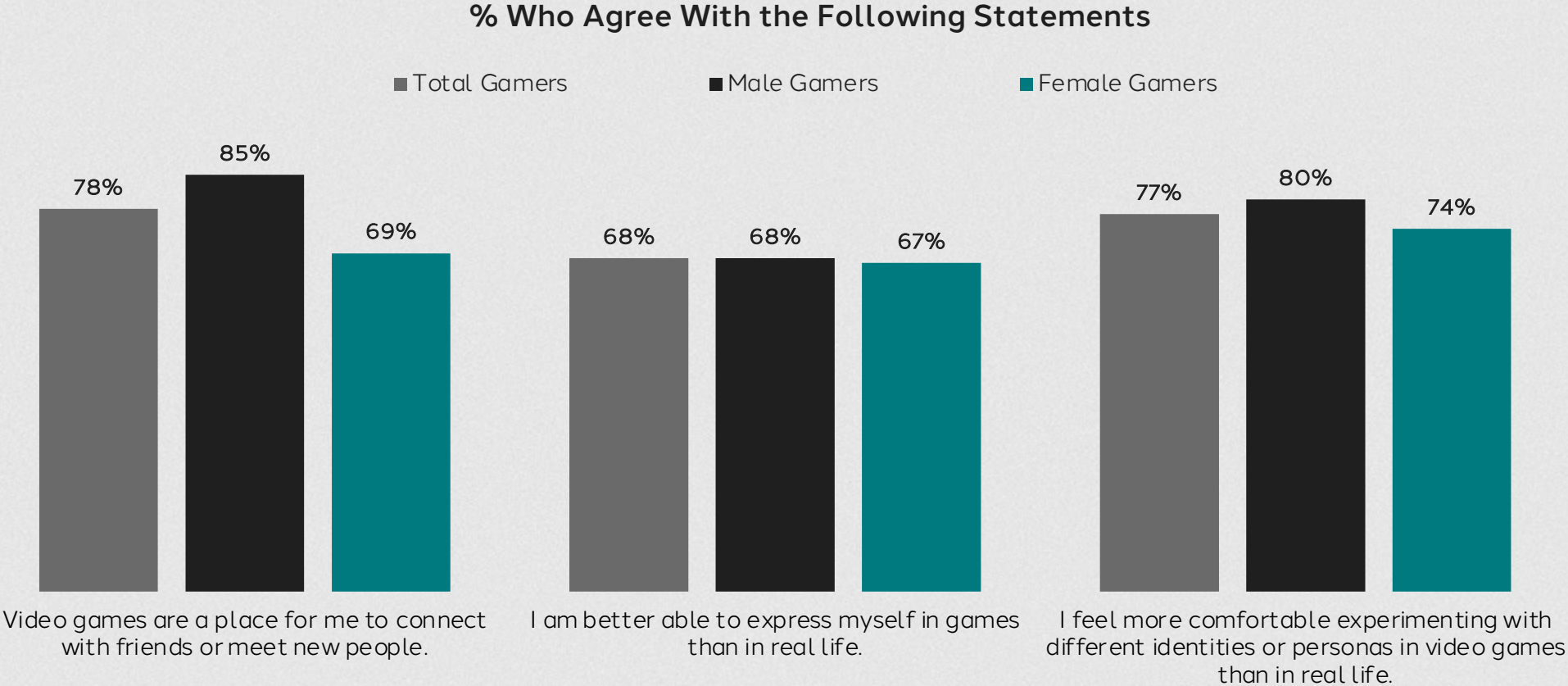
“

I like them because they support independent artists and studios and because they are often more interesting to play than mainstream games.

”

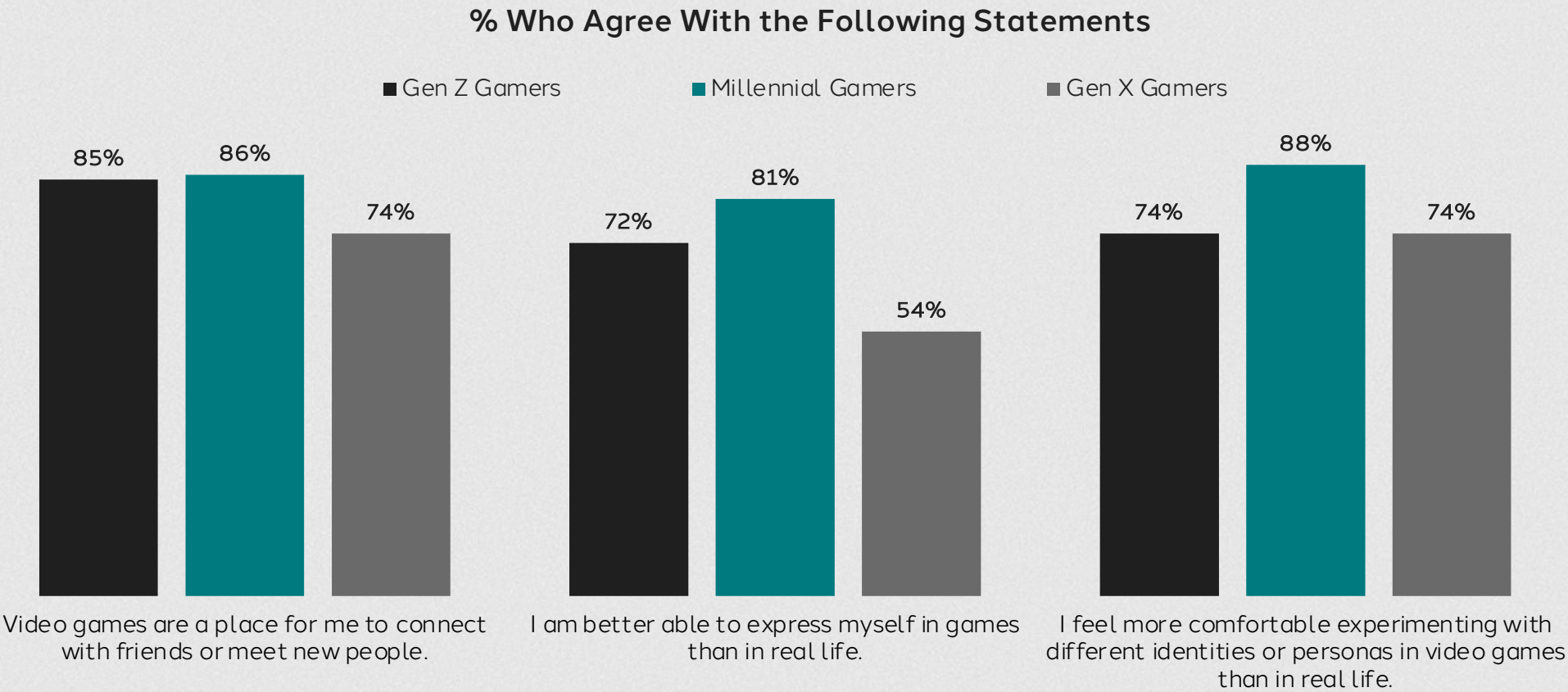
Gaming isn't just escapism, but a core element of social life.

A striking 78% of gamers agree that video games are where they connect with friends and meet new people. Gamers also report feeling better able to express themselves and experiment with their identity in games than in real-life. Notably, a majority of female gamers also feel games provide safe, inclusive spaces to connect with others, express themselves, and experiment with their identities – real strides following Gamergate.



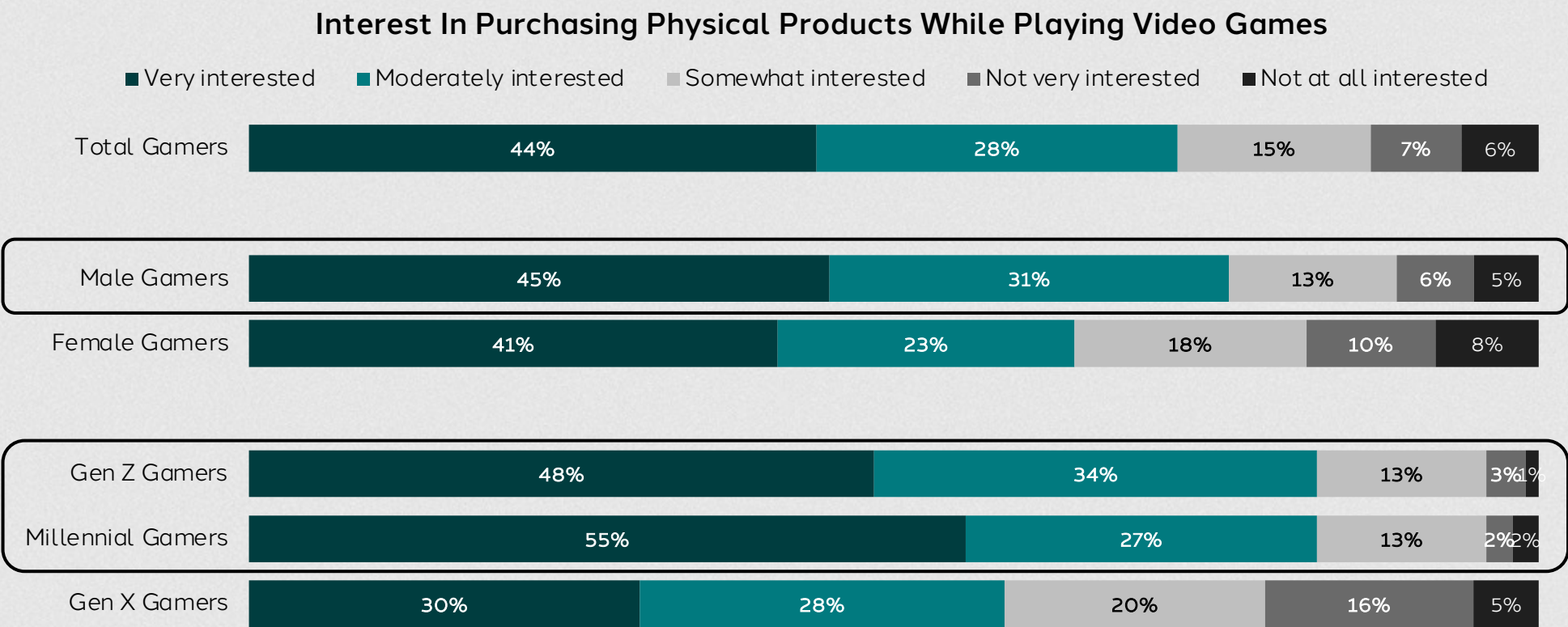
Millennial gamers especially use gaming to express and experiment.

Millennial gamers are leading the charge in using gaming as an arena for self-expression, with 81% viewing it as a space to express themselves and 88% embracing identity experimentation. While Gen X gamers may not seek self-expression as much as younger generations, they are just as likely as Gen Z to see gaming as a platform for trying out new identities.



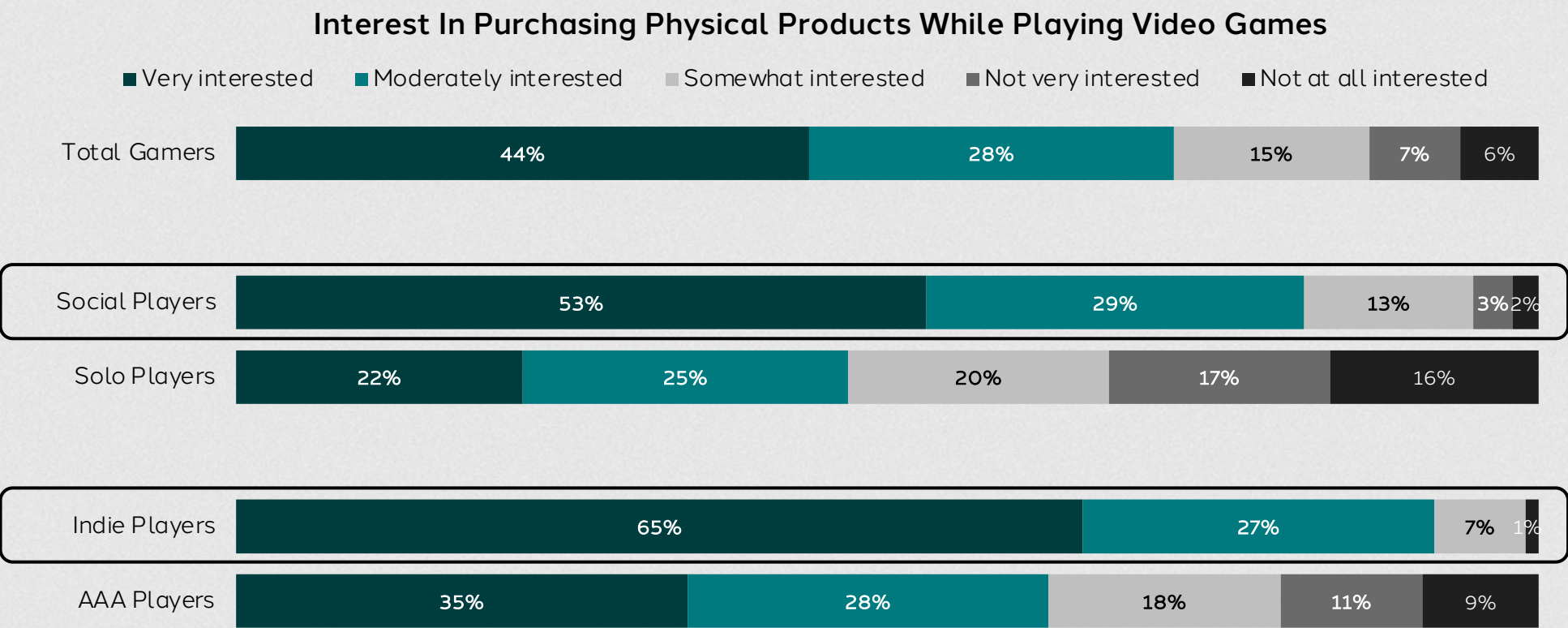
Video games are set to become powerful commerce marketplaces.

A significant 72% of gamers express interest in purchasing physical products while engaged in gameplay, indicating a robust appetite for in-game commerce. Appetite is especially pronounced among male and younger gamers.



A sense of community may amplify appetite for in-game commerce.

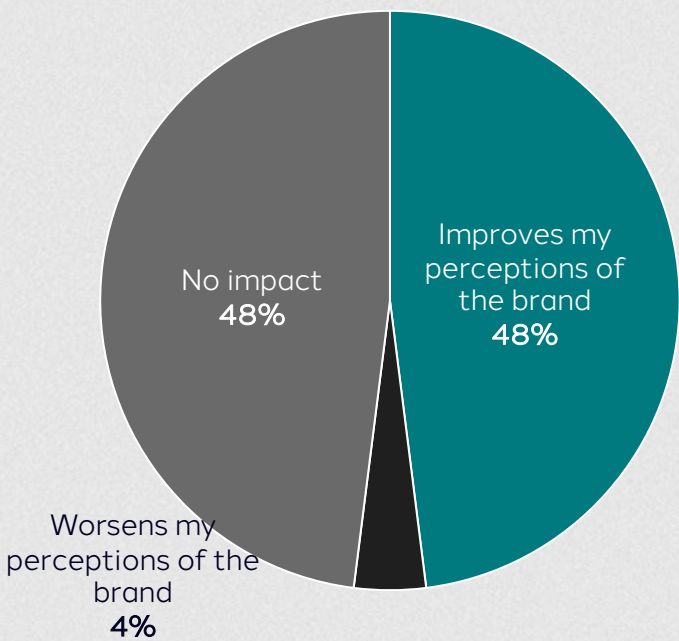
Those who play video games with others – Social Players – demonstrate a stronger interest in purchasing products while gaming compared to their solo counterparts (those who play alone). Interestingly, Indie Players appear more enthusiastic about in-game commerce than AAA Players. These trends underscore the potential for brands to find unique ways to partner with games that amplify community and niche fandoms.



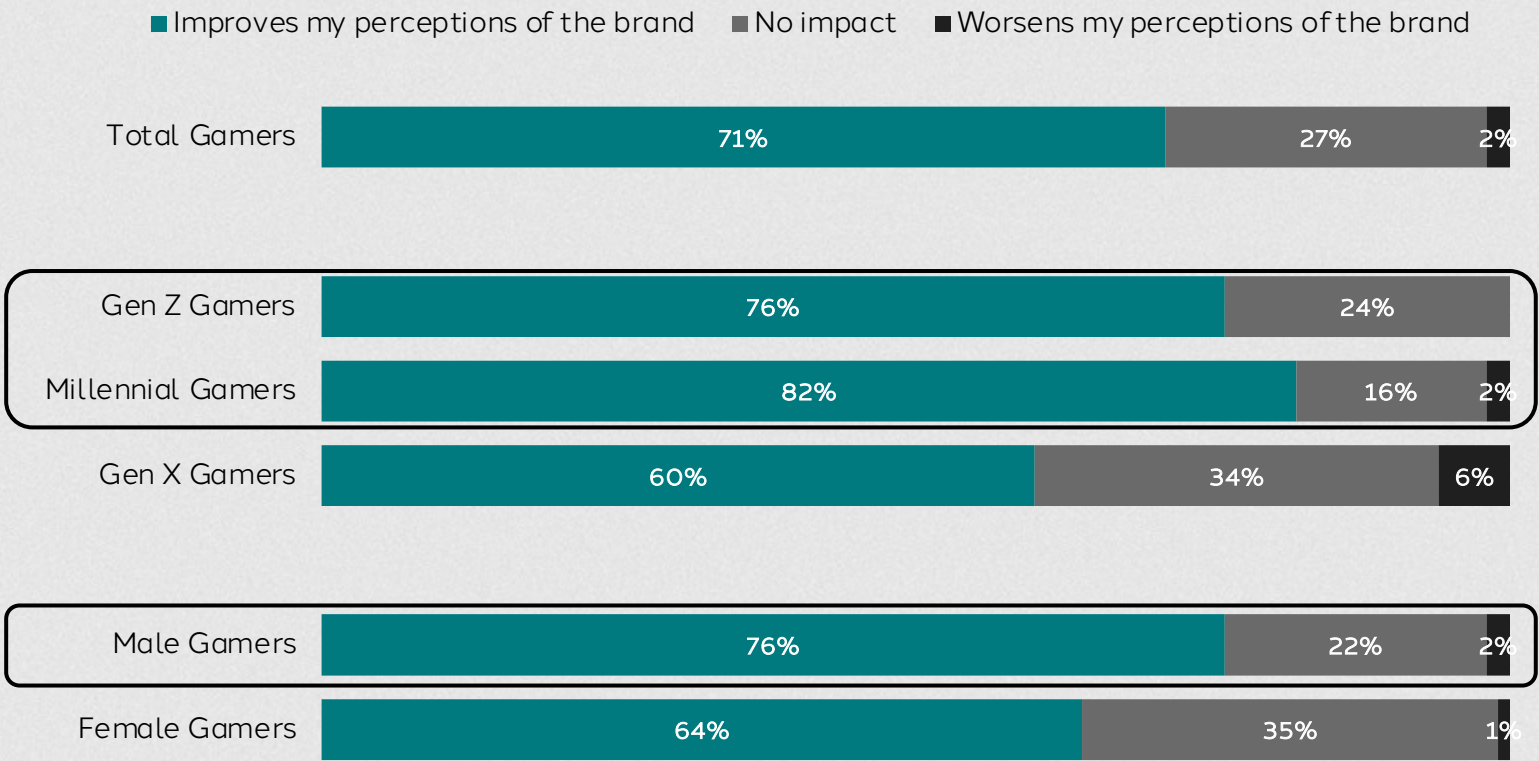
Brands see little risk in gaming partnerships, high reward among gamers.

Partnerships with video games are unlikely to alienate broader swaths of the population. Half of respondents say collaborations with games would enhance their perception of a brand and the other half say it would have no impact at all. However, gamers—particularly younger and male players—show an overwhelmingly favorable view of partnerships.

Gen. Pop.: Sentiment About Brand Partnerships With Video Games



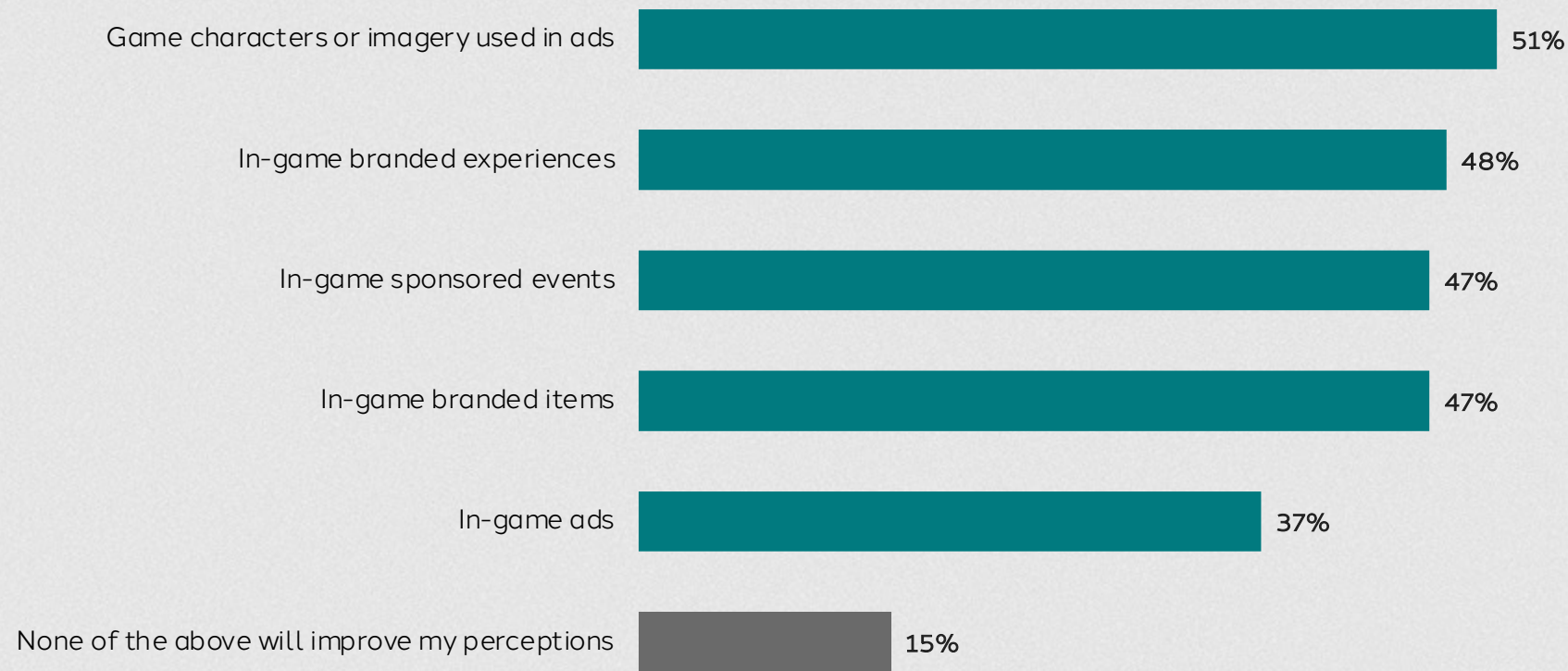
Breakdown By GAMERS Demographics



Gamers crave brand partnerships that level-up engagement.

When it comes to the types of partnerships that gamers want to see from brands, ads featuring game characters or imagery comes out on top, followed closely by in-game activations such as branded experiences, sponsored events and branded items. Although in-game ads are viewed fairly favorably, they lag at 37%.

Types of Partnerships That Will Improve Gamers’ Perceptions of Brands



Millennial Gamers are most enthusiastic about brand partnerships.

Notably, this cohort shows greater appetite for in-game sponsored events, which resonate strongly with their overall desire for immersive and interactive experiences.

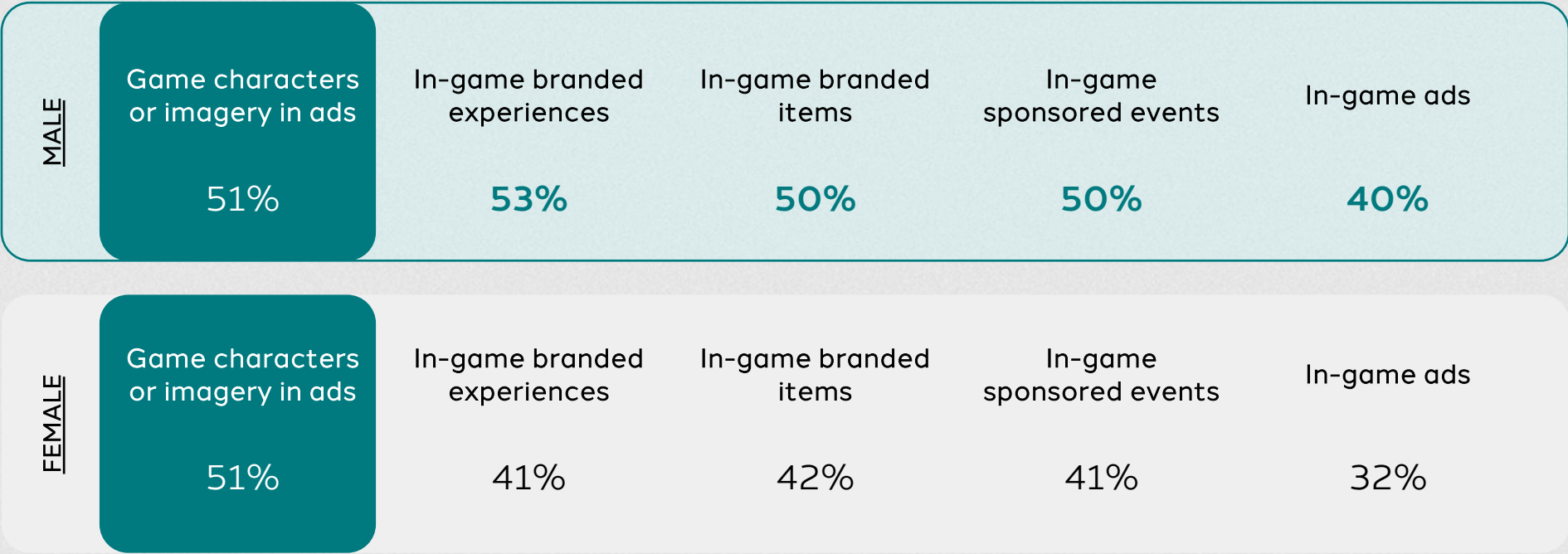
Generational Gamers’ Preferences for Brand Partnerships

GEN Z	Game characters or imagery in ads	In-game branded experiences	In-game branded items	In-game sponsored events	In-game ads
	49%	47%	46%	39%	32%
MILLENNIALS	Game characters or imagery in ads	In-game sponsored events	In-game branded experiences	In-game branded items	In-game ads
	63%	60%	58%	57%	47%
GEN X	Game characters or imagery in ads	In-game branded experiences	In-game branded items	In-game sponsored events	In-game ads
	44%	42%	40%	37%	29%

Gaming characters and visuals resonate with all gamers.

While male gamers display a stronger enthusiasm for in-game brand partnerships compared to their female counterparts, both demographics are equally receptive to ads featuring game characters or imagery. In fact, ads that bring visibility to games are the top partnership choice across all demographic cohorts surveyed.

Male & Female Gamers’ Preferences for Brand Partnerships



Implications for Marketers

Leverage Transmedia IP to capture broader audiences.

Our survey findings demonstrate that increasingly, entertainment and gaming are a feedback loop that reinforce each other. Not only that, but consumers are enthusiastic about IP transitioning between the two spheres. This means marketers can look beyond traditional gaming audiences to target broader demographics. Marketers should think transmedia - investing in cross-medium storytelling that resonates across fanbases.

Target intersecting fandoms through gaming partnerships.

Gaming is where fandoms collide—our survey explores anime and sports fandoms. With 69% of anime fans and 53% of sports fans gaming daily, marketers can capitalize on this overlap by creating targeted content and brand partnerships that speak to hybrid identities. Whether sponsoring esports events or integrating anime-inspired content into game collaborations, brands can deepen their reach by embracing the blended interests of these communities.

Invest in immersive brand partnerships that build community and power commerce.

The desire for immersive brand experiences in gaming is clear. In-game commerce, too, is gaining momentum, with 72% of gamers open to purchasing products during gameplay. Branded items or experiences that enhance gameplay—like virtual goods or event sponsorships—can drive engagement while fostering community, particularly among younger gamers and niche fandoms.



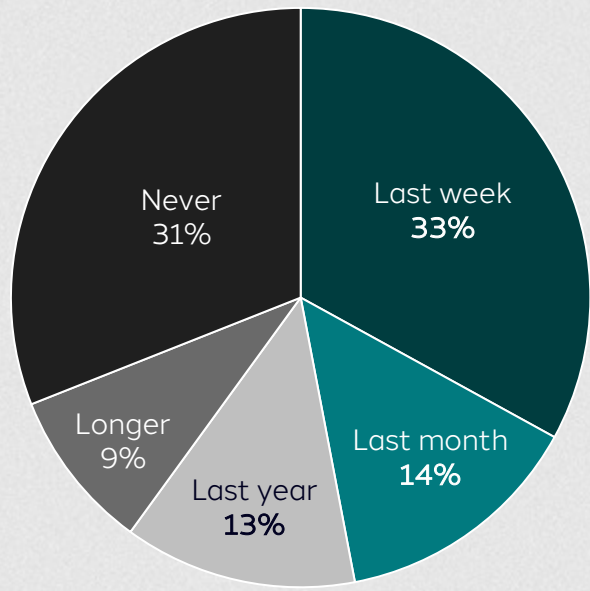
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Sport Is Expanding Beyond the Game

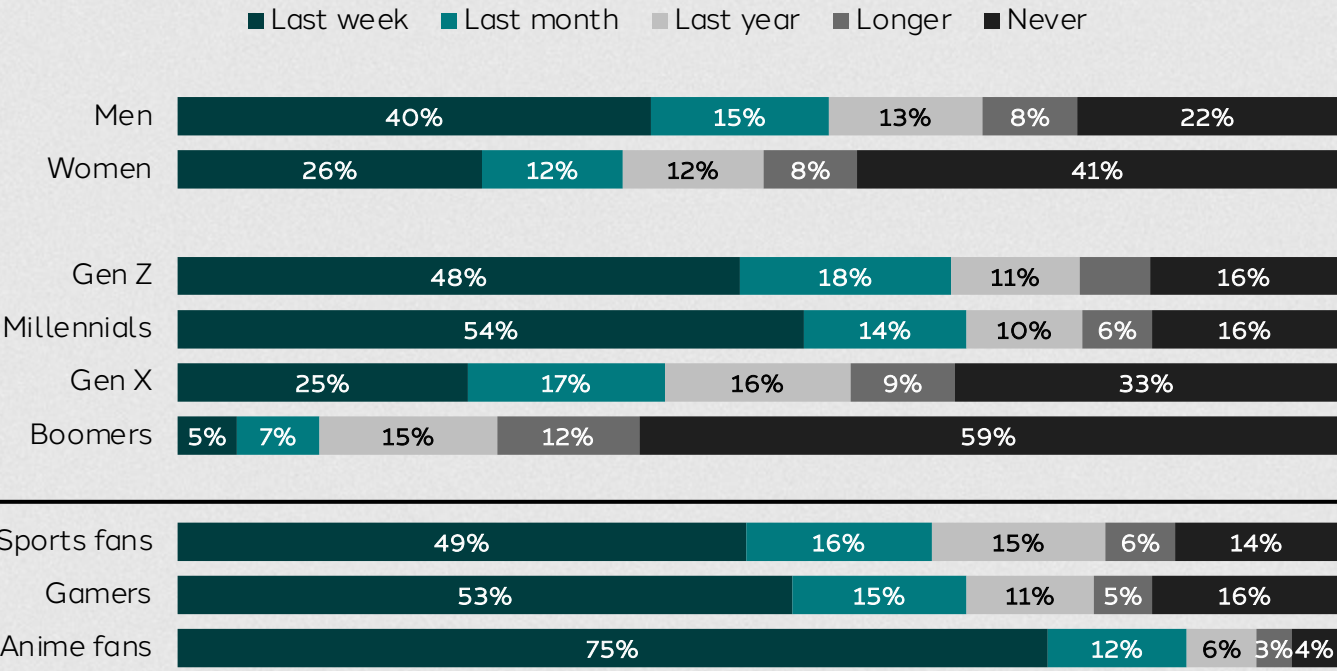
Sports docuseries score big with Americans—and unexpected fandoms.

Sports docuseries are rapidly becoming must-watch entertainment, with 47% of U.S. consumers reporting they've tuned in during the past month. What is particularly fascinating, is the unexpected crossover appeal with other fandoms—68% of gamers and a striking 87% of anime fans report watching a sports docuseries in the last month.

Gen. Pop.: How Recently Consumers Last Watched a Sports Docuseries

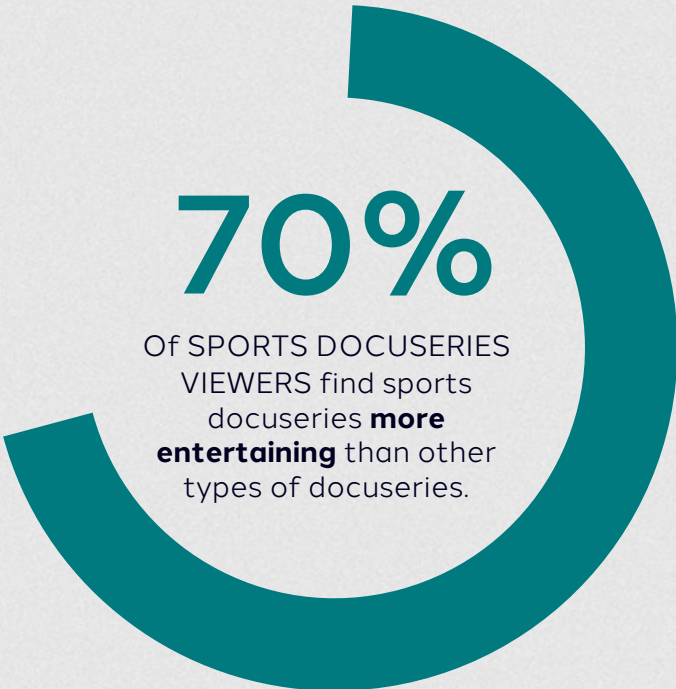


Breakdown By Audience Demographics



For viewers, sports docuseries are proving to be a winning formula.

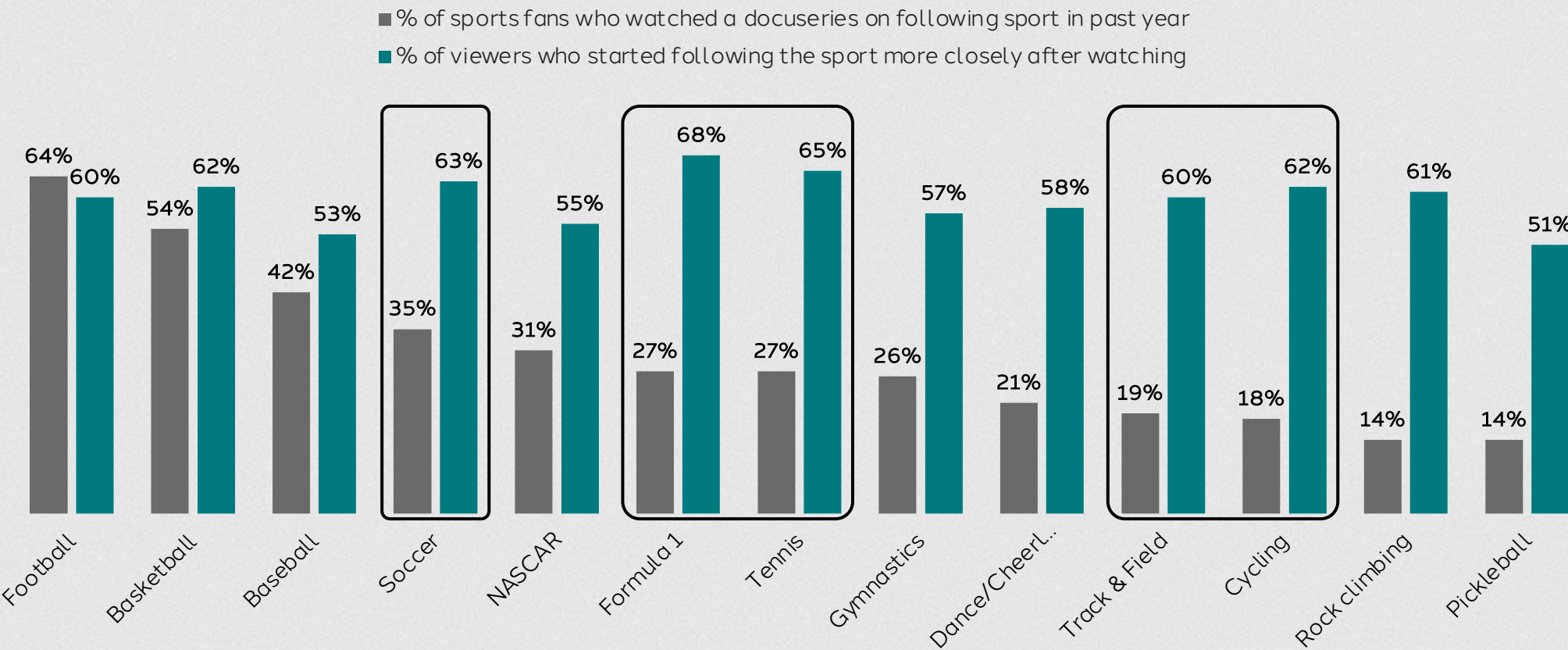
For sports docuseries fans, the genre isn't just a favorite—it's a standout. A strong 67% of viewers prefer sports docuseries over other types, with 70% finding them more entertaining than other docuseries.



Sports docuseries boost followership across major and niche sports.

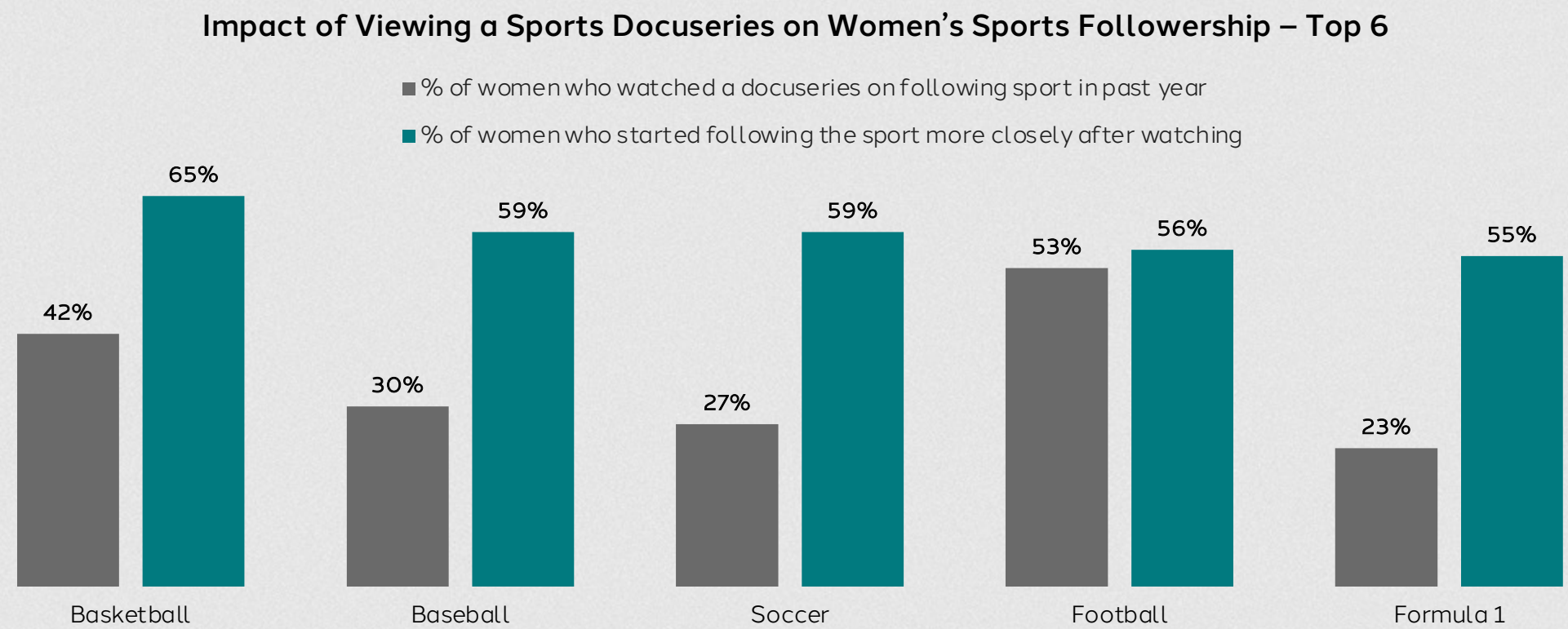
While docuseries on major sports like football, basketball, and baseball are enjoying the most viewers, sports previously less followed in the US, like Formula 1, tennis, soccer, track & field, and cycling are enjoying the biggest inroads in fan engagement.

Impact of Viewing a Sports Docuseries on Sports Followership



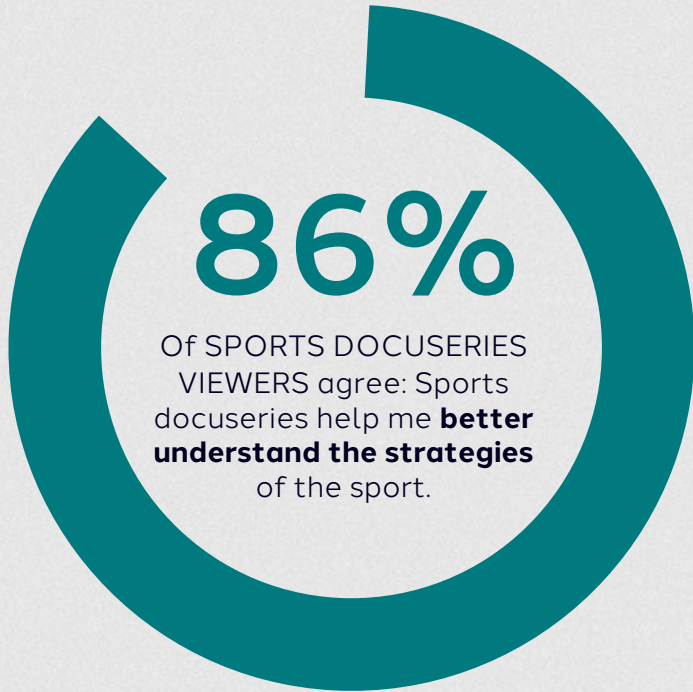
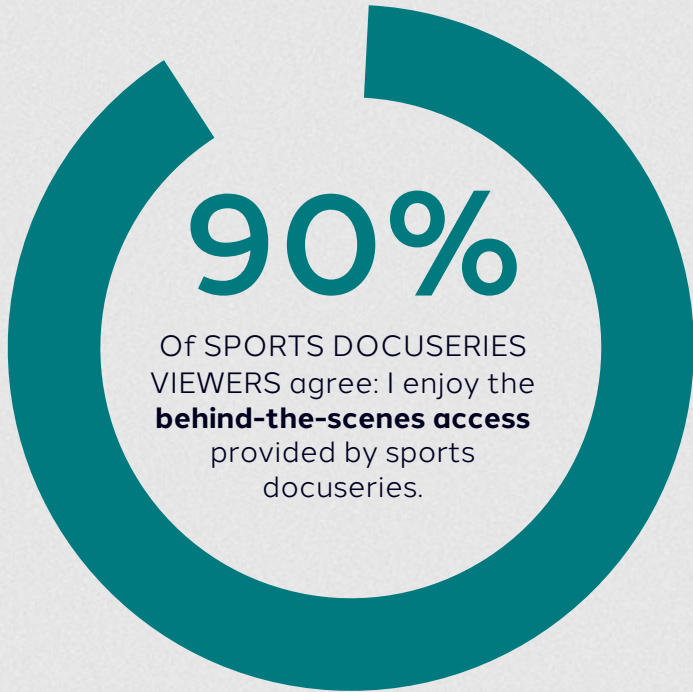
Sports docuseries may help grow engagement among female fans.

Among female sports fans, 42% reported watching a basketball docuseries, with 65% of those viewers saying it led them to follow the sport more closely. Other sports enjoying a boost of female engagement thanks to docuseries include baseball, soccer, football, and Formula 1.



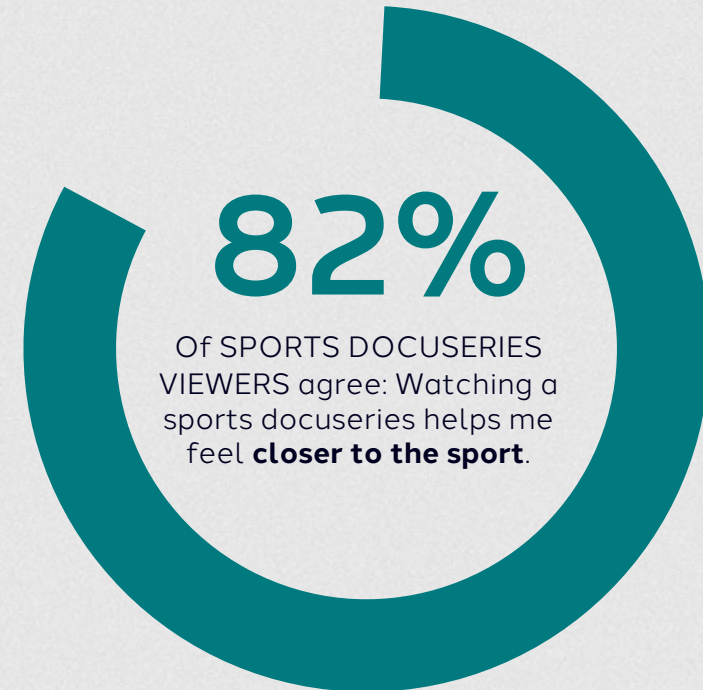
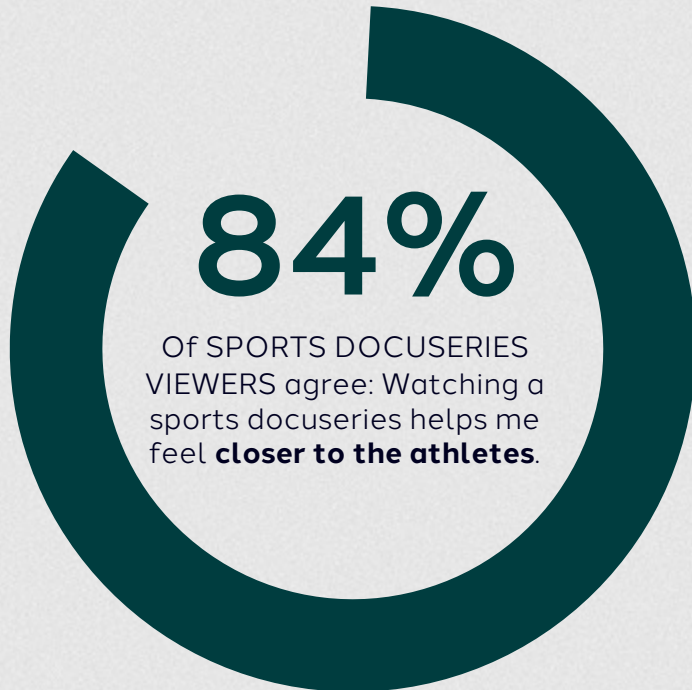
Engagement stems from the inside scoop sports docuseries provide.

For 90% of sports docuseries viewers, the real draw is the behind-the-scenes access that these shows provide. Additionally, 86% of viewers say docuseries help them better understand the strategies of the sport, revealing layers of complexity that aren't always visible on game day.



Athletes are as fascinating—if not more—to fans than the sport itself.

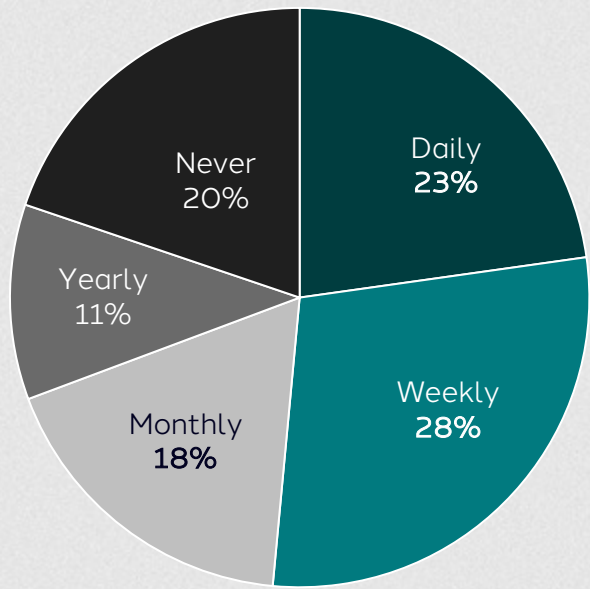
84% of viewers say sports docuseries help them feel more connected to athletes, while 82% report feeling closer to the sport itself.



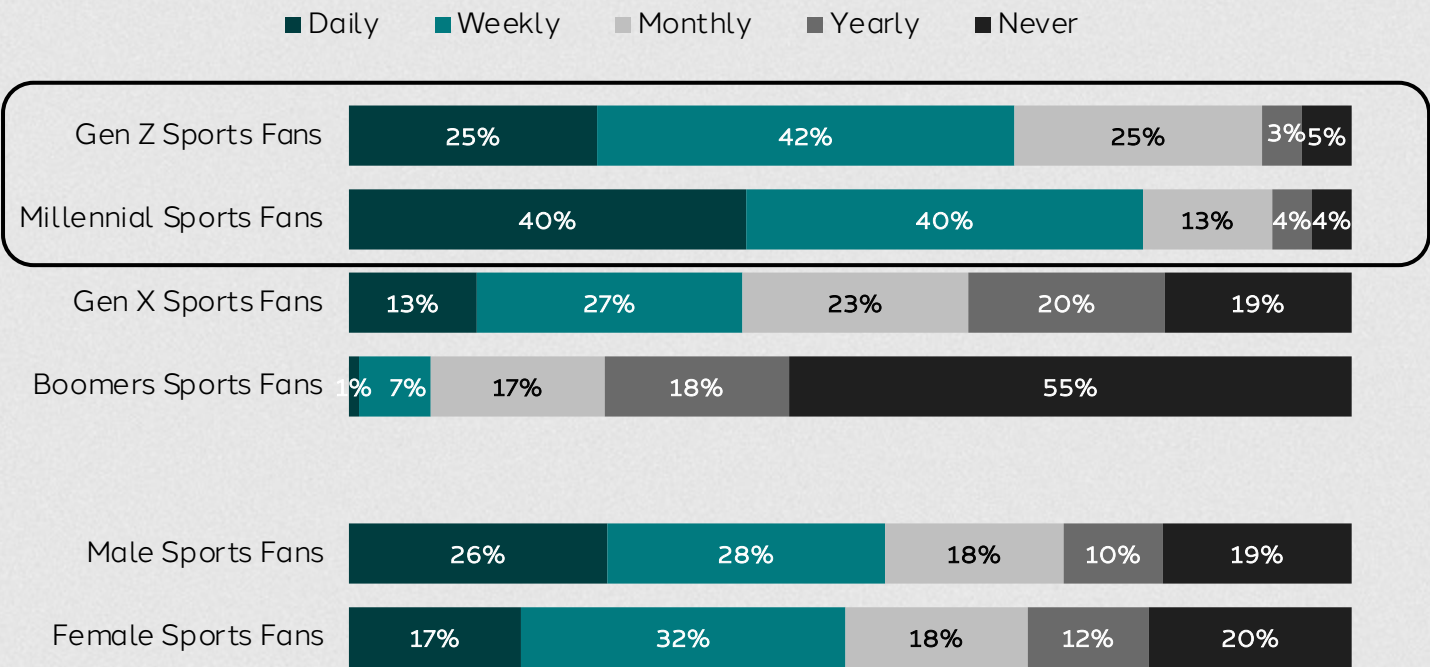
Athletes are no longer just competitors—they're content creators, too.

Half of sports fans seek out content from athletes at least weekly. Younger sports fans are leading the charge, looking to athletes for behind-the-scenes glimpses and personal insights that extend beyond the field.

How Often Sports Fans Seek Out Content From Athletes Off-Field



Breakdown By SPORT FANS Demographics

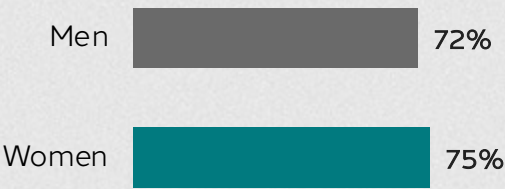


Female fans are slightly more engaged by athlete’s content.

As shown on the previous slide, nearly half (49%) of female sports fans are seeking out content from athletes weekly, and their engagement runs deep. A notable 70% of female fans say they care as much about athletes' off-field lives as their sports performance, slightly outpacing men (64%).

73%

Of SPORTS FANS agree: I prefer following athletes who **share their personal stories and experiences** outside of sports.



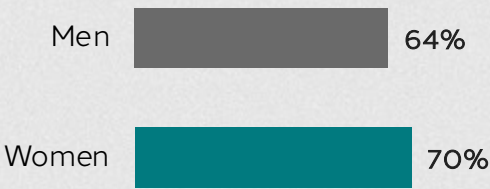
68%

Of SPORTS FANS agree: I feel a **personal connection to athletes based on their off-field activities** and content.



66%

Of SPORTS FANS agree: I **care about the off-field activities of athletes** as much as I care about their performance in sports.

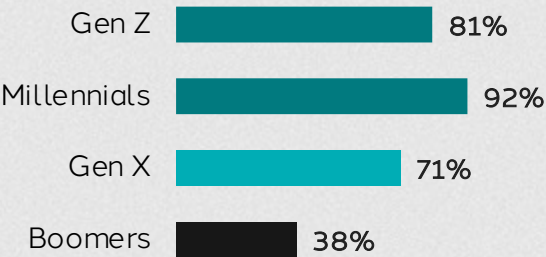


Younger sports fans flock to athletes' off-field content.

Younger sports fans are more engaged with athletes' off-field content than their older counterparts, a trend likely tied to broader media consumption habits. As digital natives, they are more comfortable blurring the lines between sport and entertainment media.

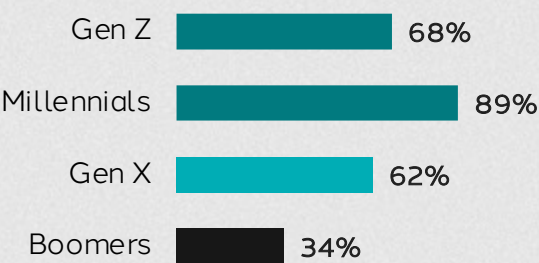
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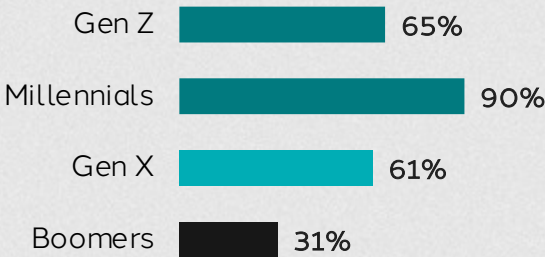
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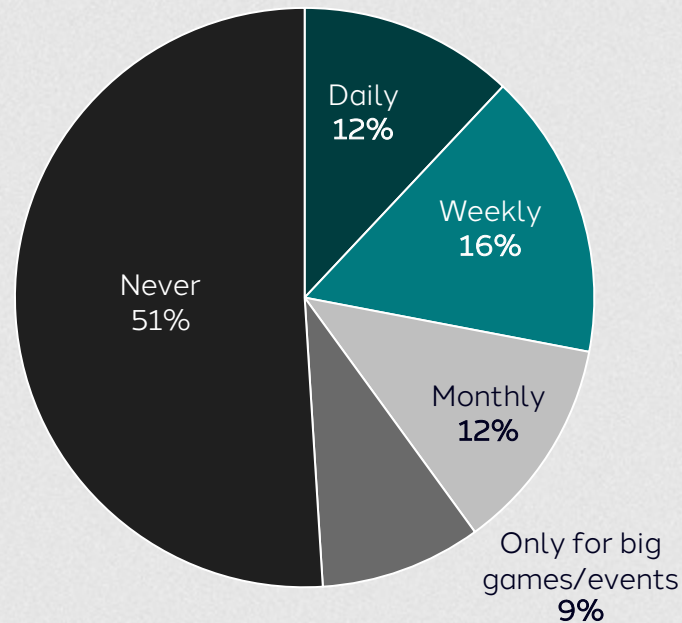
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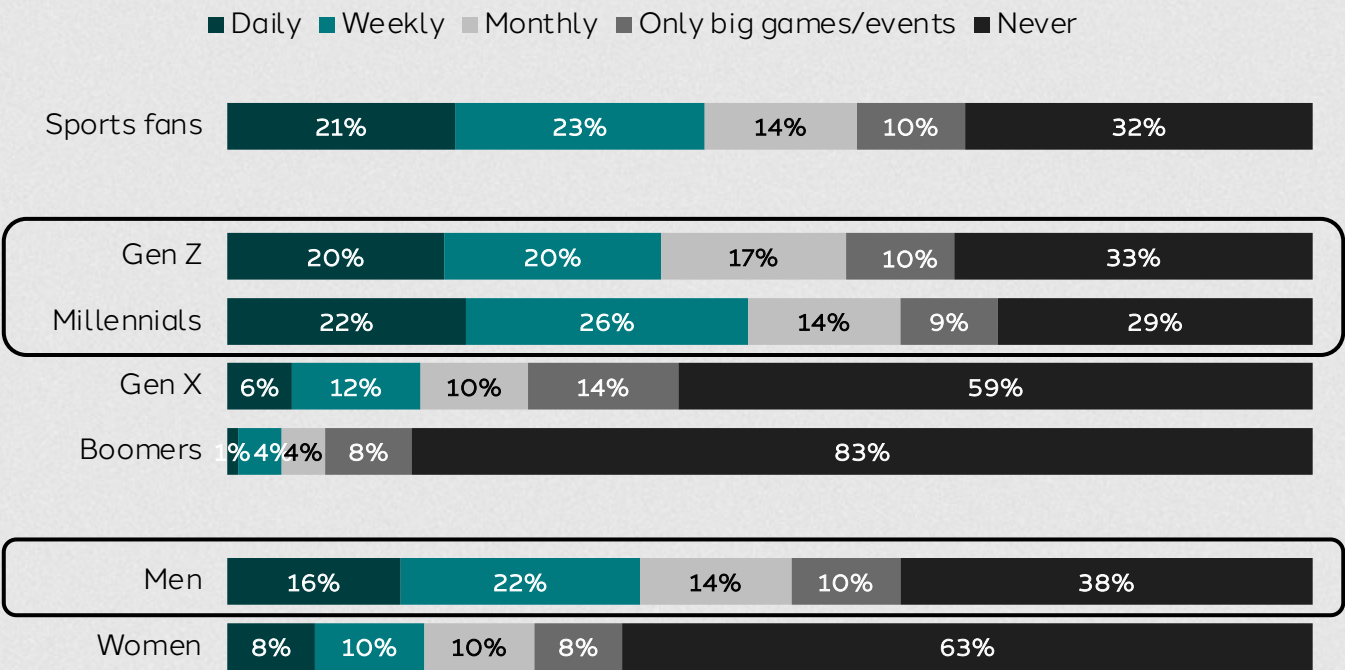
Americans are betting big on sports.

Sports betting is becoming a favored pastime, with 50% of the general population having placed a bet on sports, rising to 68% among sports fans. Gen Z and Millennials are especially active, betting more frequently than older generations, while men continue to outpace women in this space.

Gen. Pop.: How Often Consumers Place Bets on Sports Events



Breakdown By Audience Demographics



For sports betters, betting enhances the thrill of the game.

Sports betters almost unanimously agree, betting makes them feel more engaged and boosts the entertainment factor. Even more telling, 89% admit they're more likely to tune into games they've bet on—regardless of team loyalty—proving that the allure of a wager can turn any match into must-watch TV. These sentiments hold true across all sports betters regardless of gender or generation.

89%

Of SPORTS BETTERS agree: I feel **more engaged** with the game/event when I have placed a bet on it.

90%

Of SPORTS BETTERS agree: Sports betting makes the game/event I'm watching **more entertaining**.

89%

Of SPORTS BETTERS agree: I am **more likely to watch** games/events that I have bet on, even if I'm not a fan of the teams.

Implications for Marketers

Embrace behind-the-scenes content to build authenticity and engagement.

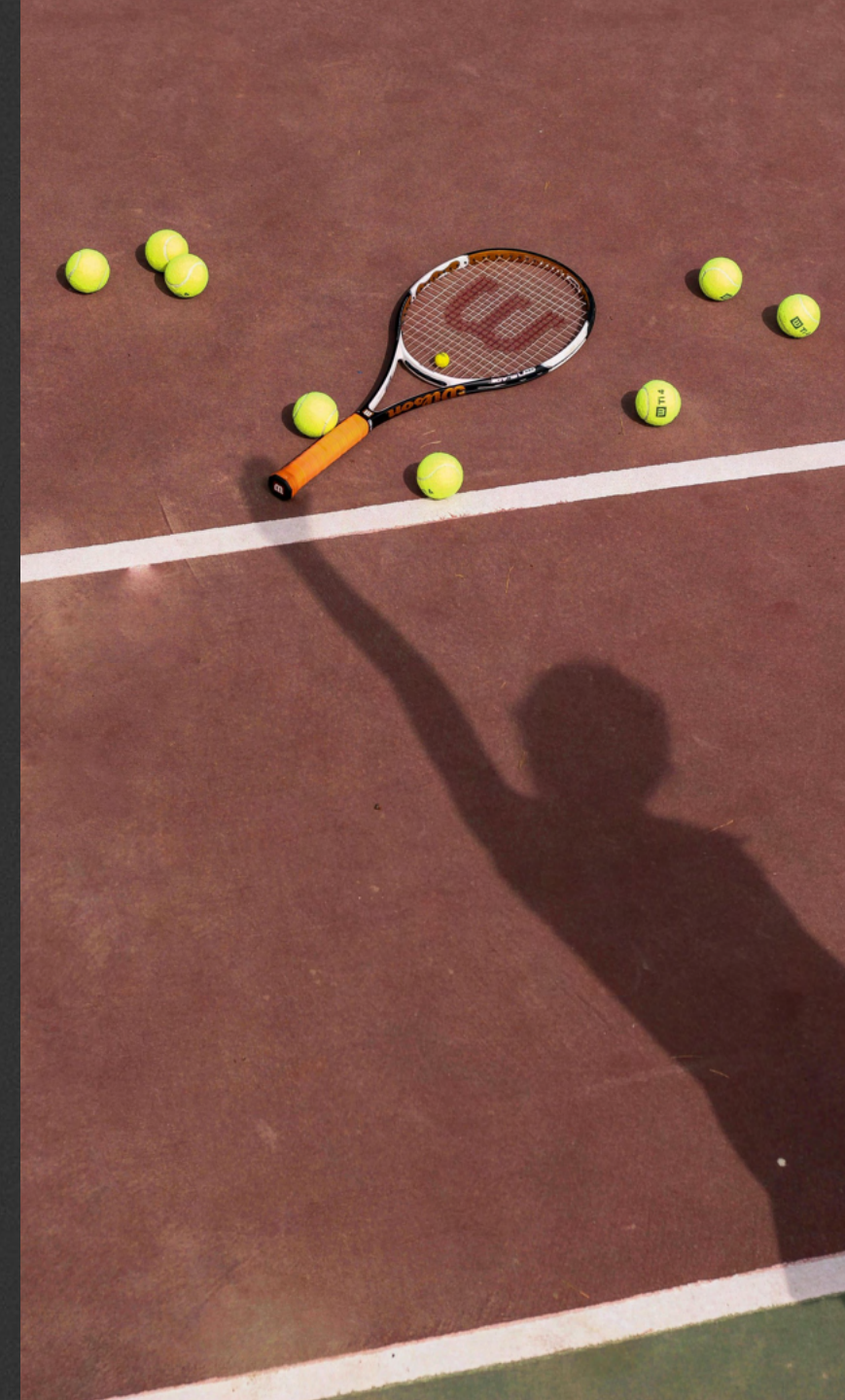
The success of sports docuseries stems from their behind-the-scenes access, with 90% of viewers drawn to the insider look at athletes and sports strategies. This means fans crave more than just game day action—they want to feel part of the story. Similarly, 50% of sports fans are seeking out athlete content weekly—and younger fans especially. Marketers should focus on producing or sponsoring content that showcases the personal, raw, and strategic aspects of sports and the athletes that power them.

Look for ways to engage the growing female fan base.

Women are increasingly engaging with sports through docuseries. With 42% watching a basketball docuseries, and 65% becoming more engaged with the sport, marketers should seize the opportunity to create content and campaigns tailored to female audiences. Highlighting narratives that resonate with women, such as personal athlete stories, will allow brands to tap into an underrepresented but growing market.

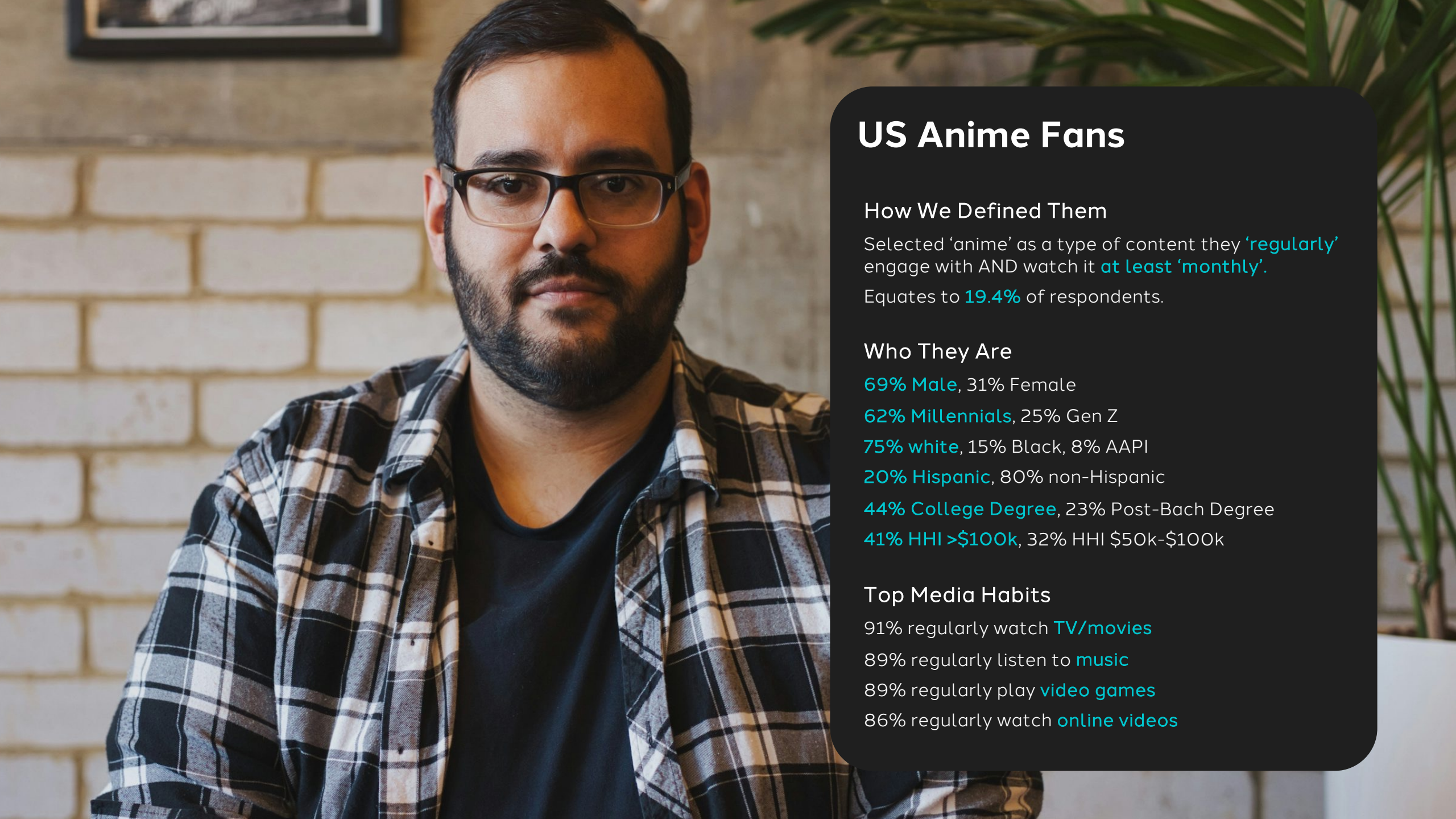
Consider whether sports betting is the right fit for your brand.

With 89% of sports bettors more likely to watch games they've placed bets on, betting is becoming a significant driver of sports viewership. If appropriate, marketers should consider how they can deliver experiences that enhance the real-time excitement of games. Consider integrating sports betting into marketing strategies, whether through sponsorship of betting platforms or in-game engagement.



04

Anime Goes From Niche to Mainstream



US Anime Fans

How We Defined Them

Selected 'anime' as a type of content they 'regularly' engage with AND watch it **at least 'monthly'**.

Equates to **19.4%** of respondents.

Who They Are

69% Male, 31% Female

62% Millennials, 25% Gen Z

75% white, 15% Black, 8% AAPI

20% Hispanic, 80% non-Hispanic

44% College Degree, 23% Post-Bach Degree

41% HHI >\$100k, 32% HHI \$50k-\$100k

Top Media Habits

91% regularly watch **TV/movies**

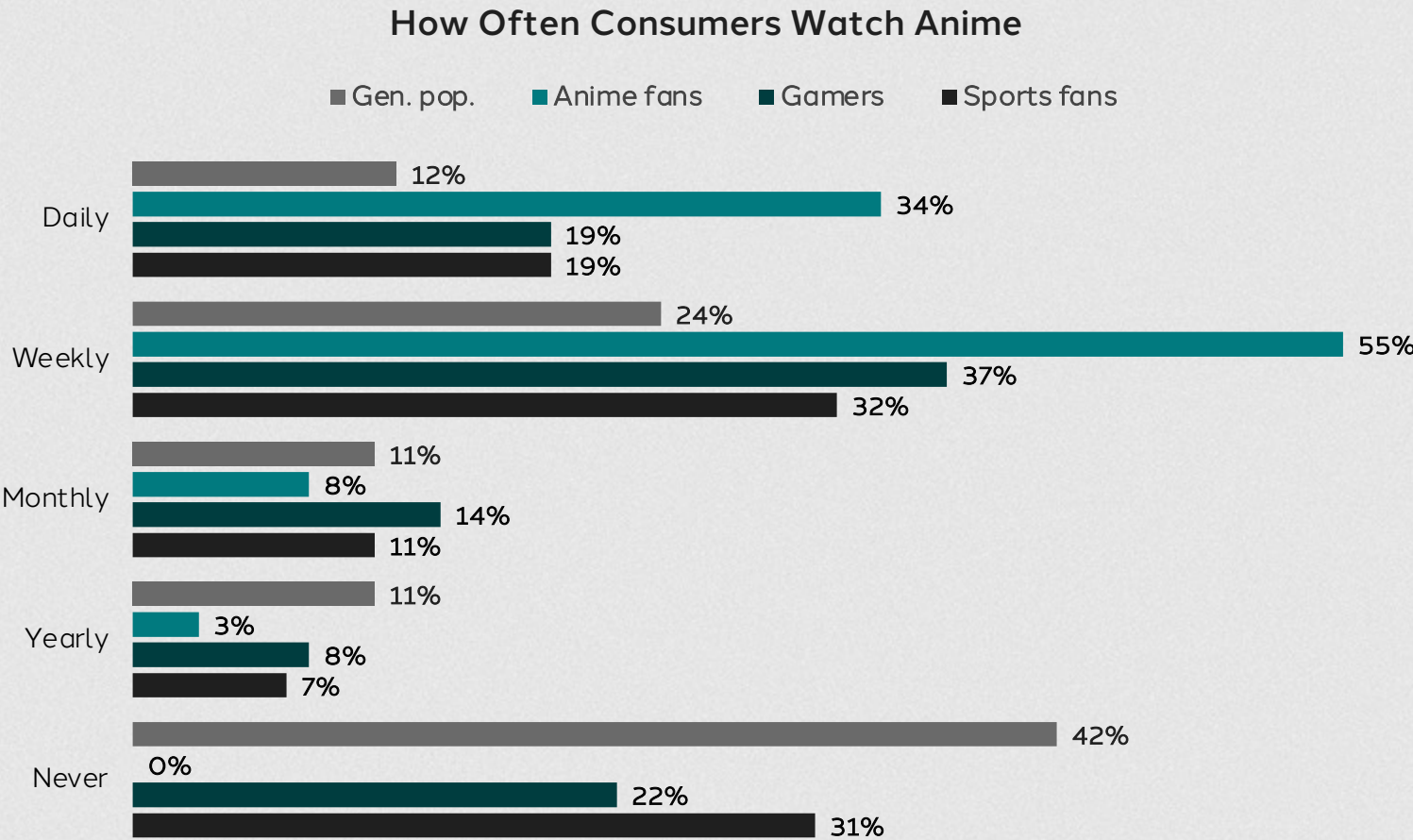
89% regularly listen to **music**

89% regularly play **video games**

86% regularly watch **online videos**

Anime’s popularity in the US is soaring—especially among fandoms.

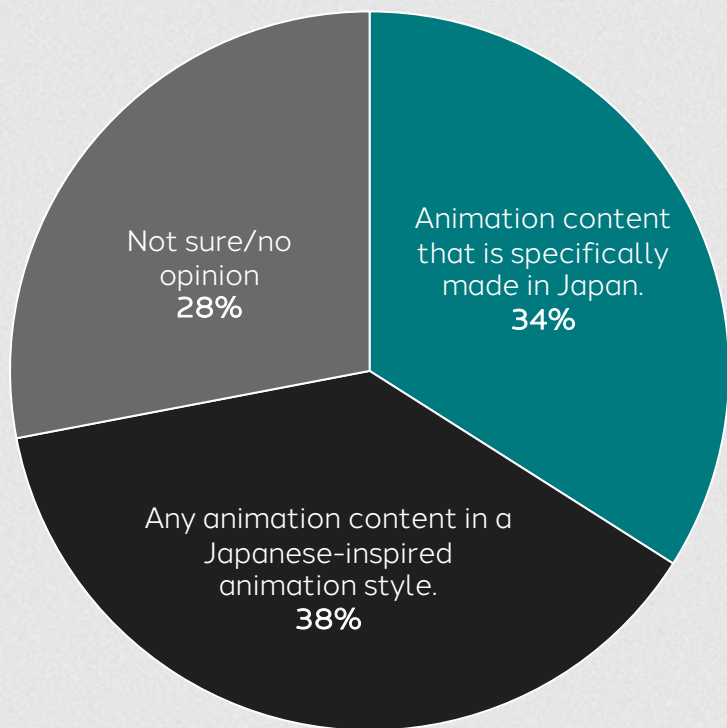
Anime is capturing American screens, with 47% of the population tuning in at least monthly. Among dedicated anime fans, viewing is even more frequent—one-third watch daily, and 55% watch weekly. Notably, gamers and sports fans are diving deeper into anime than the general population, showcasing its cross-fandom appeal.



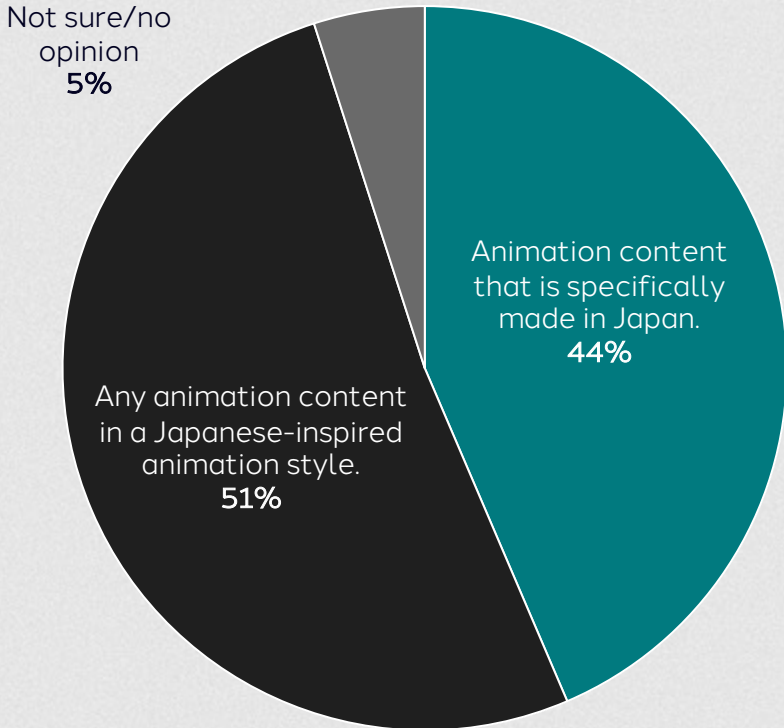
Americans broaden the definition of what counts as “anime.”

In the U.S., the definition of anime is expanding beyond its traditional roots. While 44% of anime fans still see it as animation strictly made in Japan, 51% now define it more broadly, including any animation created in a Japanese-inspired style. This evolving view reflects anime's growing influence and its blend with global animation cultures.

Gen. Pop.: Views on How to Define “Anime”



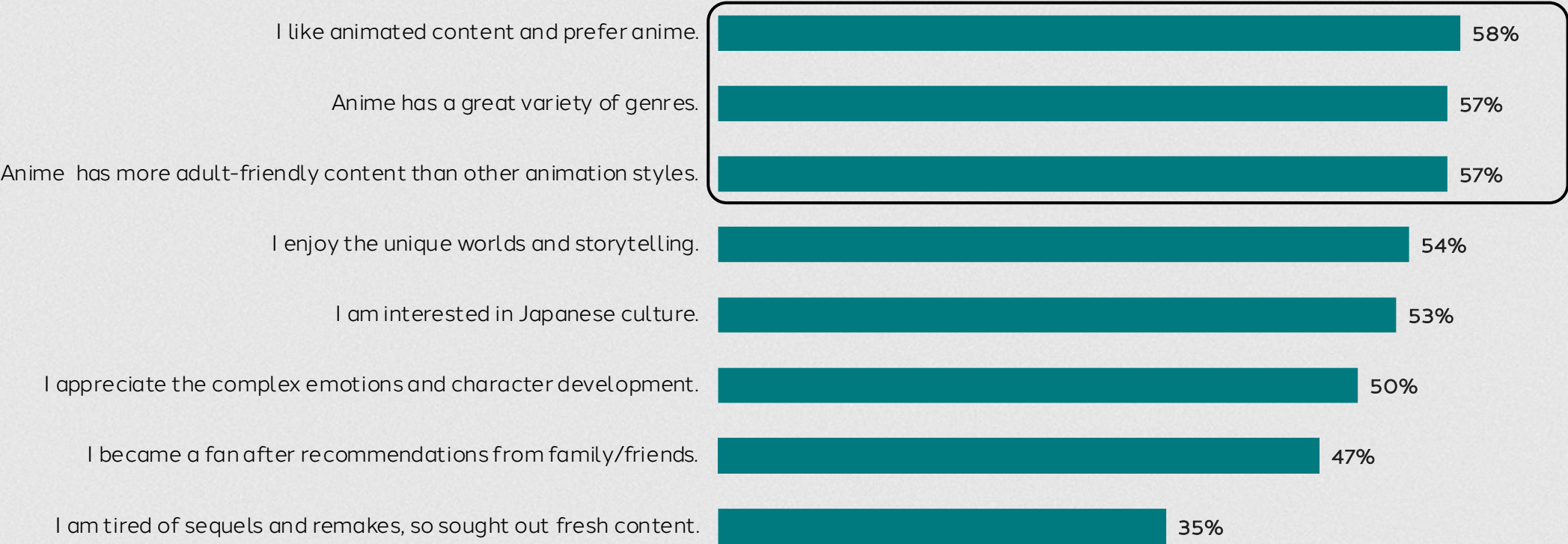
Anime Fans: Views on How to Define “Anime”



US fans are crossing the animation-to-anime bridge.

For many U.S. fans, anime is a natural progression from broader animation, with 58% citing it as their entry point. This crossover helps explain why U.S. fans are increasingly broadening the definition of what anime can be. They're drawn to anime's diverse genres and its adult-friendly content.

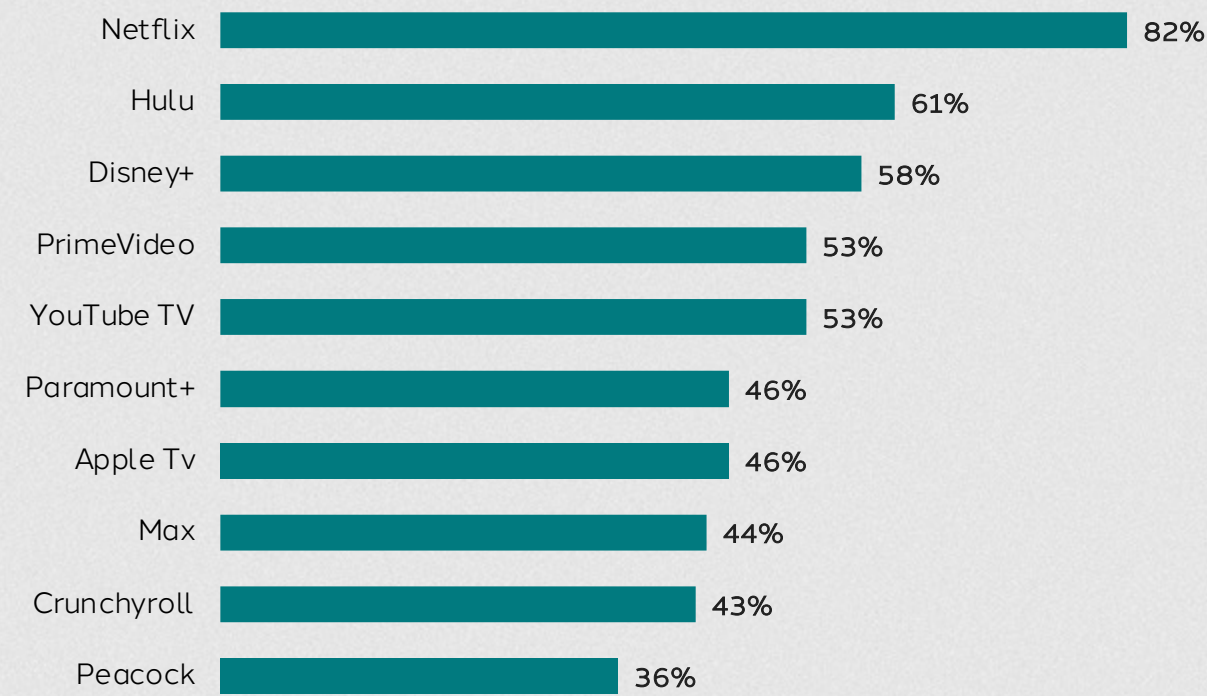
Reasons Fans Prefer Anime to Other Entertainment Content



Mainstream streaming platforms are powering the US anime boom.

Mainstream platforms are key drivers of anime's growing U.S. viewership. A striking 82% of anime fans subscribe to Netflix specifically for anime content, followed by Hulu and Disney+. Outside the big players, 43% of fans turn to Crunchyroll, solidifying its niche appeal. Many of the anime titles respondents mentioned as their favorites are available to stream on these top platforms.

Top 10 Streaming Platforms Anime Fans
Subscribe to For Anime Content



What is your favorite anime series, if you have one?



Anime fans crave more manga and live-action adaptations.

Anime fans' love for their favorite content extends beyond the screen, with 56% diving into manga. As live-action adaptations rise, 65% of fans are eager for more, though that does include 31% who demand the involvement of original creators.

56%

Of ANIME FANS also **read manga** based on their favorite anime shows.

Manga is an umbrella term for a wide variety of comic books and graphic novels originally produced and published in Japan. In Japan, manga are typically released on a monthly or a weekly chapter-by-chapter basis through manga magazines.

The New York Public Library

65%

Of ANIME FANS are **excited for more live action adaptations of anime.**

While 44% are excited no matter who makes them, **31% will only be excited if the original creators are involved.**

Netflix Debuted a Live-Action Remake of Cowboy Bebop in 2021

Netflix's Cowboy Bebop: All the Anime Homages in the Live-Action Series

This apple didn't far fall from the anime tree.

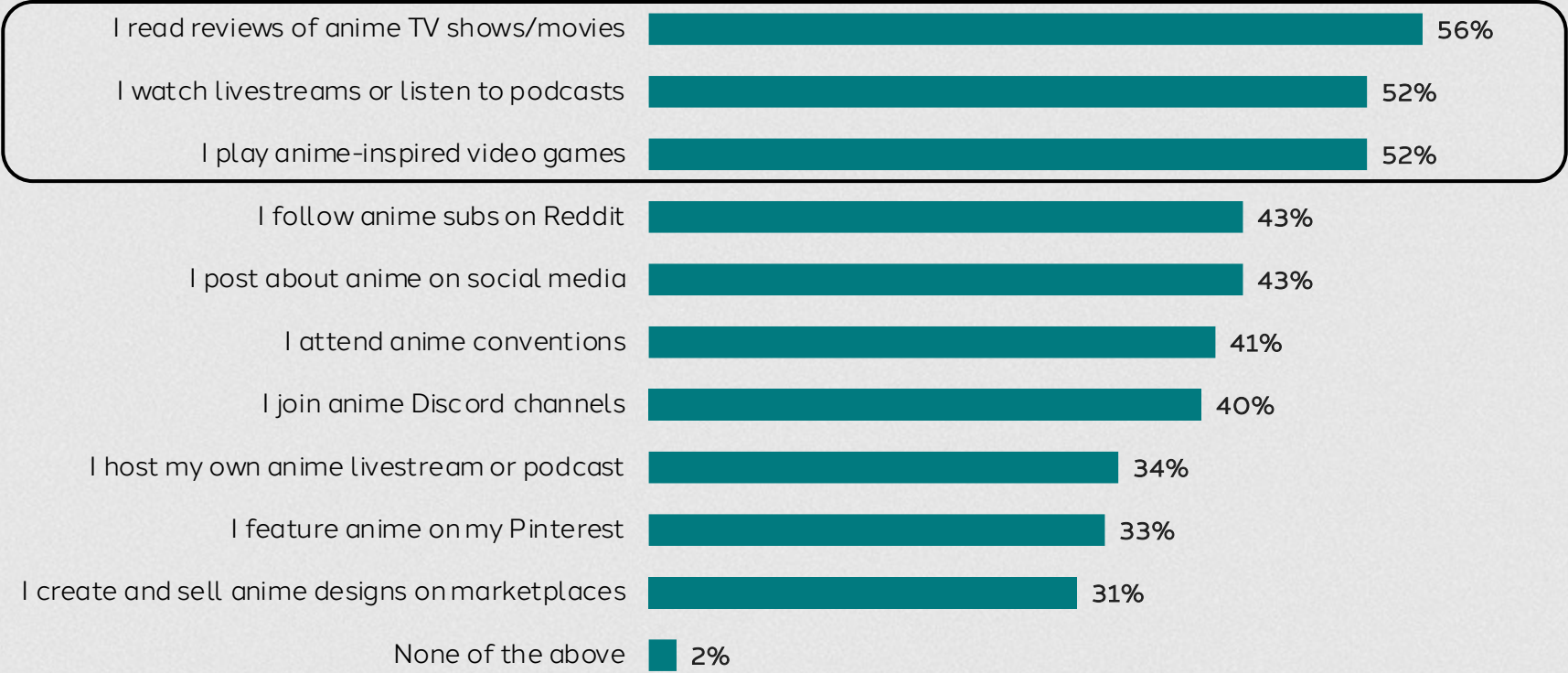


BY JESSE SCHERER, ARIEN LARSEN, MAX SCOVILLE | UPDATED: NOV 23, 2021 5:20 PM | POSTED: NOV 23, 2021 5:00 PM

Anime fans dive deeper into the fandom beyond the screen.

They immerse themselves in the anime community by reading reviews, tuning into livestreams or podcasts, and playing anime-inspired video games, highlighting how fandom extends into every corner of media and interaction. Anime fans tend to engage similarly, regardless of gender or age.

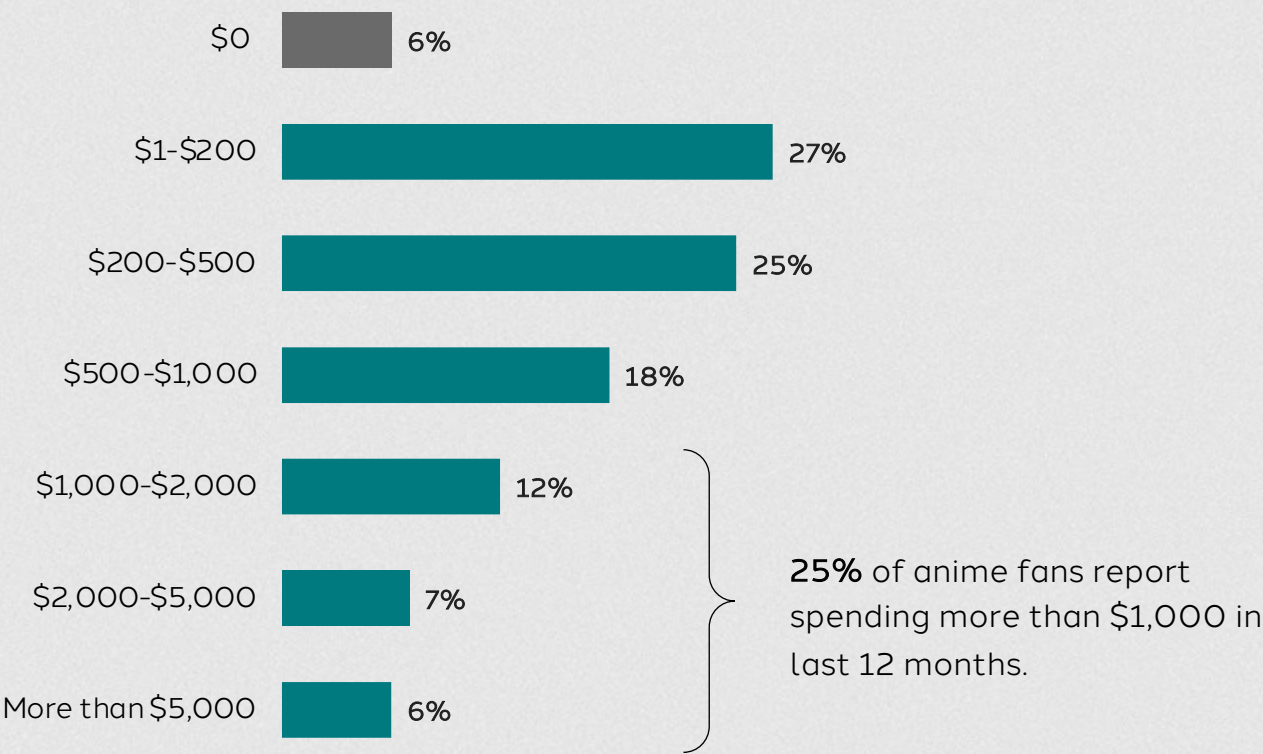
How Anime Fans Engage With the Community



Anime fans open up their wallets for merchandise.

Anime fandom comes with a serious commitment to merch—94% of fans spent on anime-related products in the past year. A quarter of fans splurged over \$1,000, while others spent more modestly, with 27% spending up to \$200 and 25% dropping between \$200-\$500.

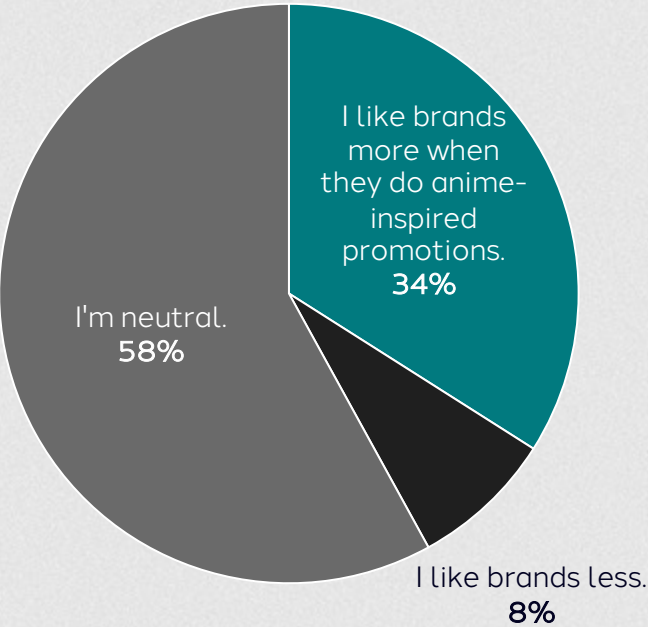
\$ Amount That Fans Report Spending on Anime Merchandise In Past 12 Months



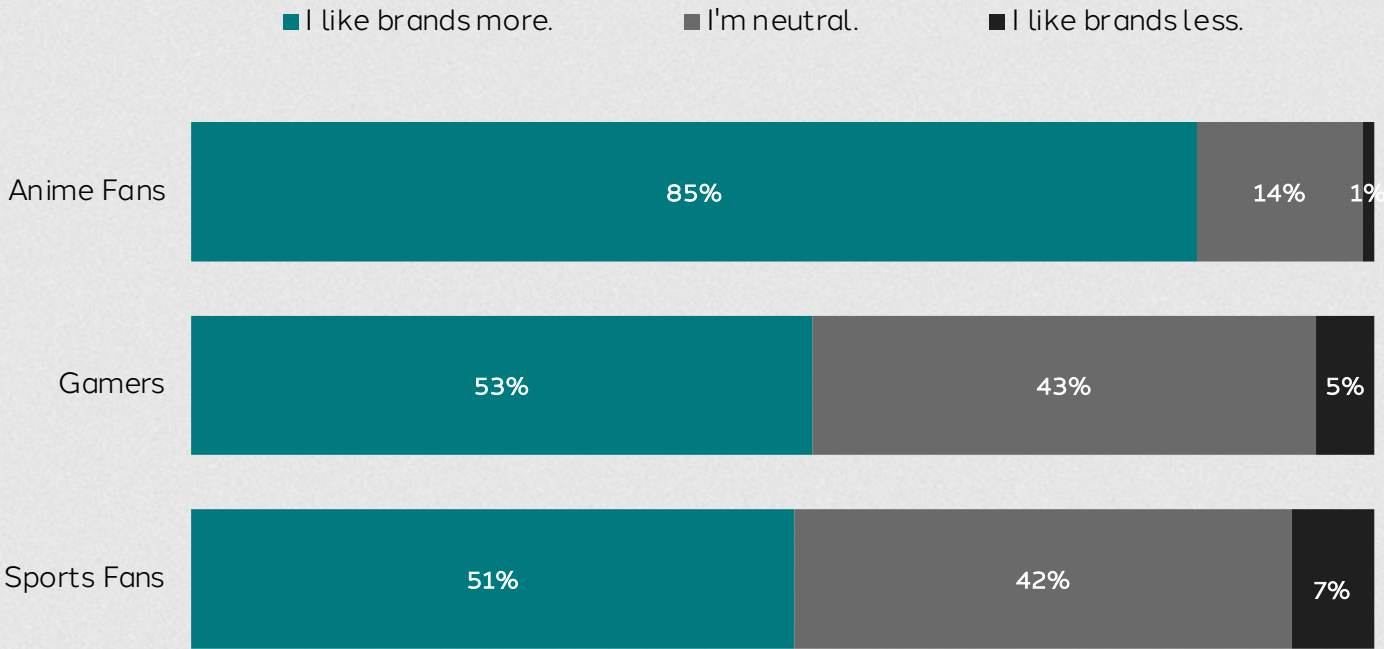
Brands see little risk in anime promotions, high reward among fandoms.

Anime-inspired initiatives are unlikely to alienate brands’ core consumers. Almost 60% of the general population feel neutral about brands creating anime-inspired promotions, while one-third feel positively. However, anime fans (85%) —and gaming (53%) and sports (51%) fandoms—express greater favorability towards brand promotions.

Gen. Pop.: Sentiment About Anime-Inspired Brand Promotions



Sentiment Among FANDOMS



Implications for Marketers

Be a first-mover to leverage anime's cross-fandom appeal.

For brands considering anime-inspired promotions, there's little downside. Nearly 60% of the general population feels neutral about brands doing anime-inspired campaigns, but among anime fans, favorability jumps to 85%. Additionally, major fandoms like gaming and sports also express high favorability toward such promotions. This means brands can confidently experiment with anime-themed activations without worrying about alienating broader audiences, while also gaining traction within passionate fandoms.

Experiment with creative flexibility.

The fact that over half of anime fans define anime more broadly—beyond just Japanese-produced animation—shows the fluidity of how U.S. audiences view the genre. This evolution opens the door for brands to engage with anime-inspired content. Marketers can confidently experiment with anime aesthetics, themes, and styles, knowing that U.S. audiences embrace creative adaptations.

Assess tangible opportunities in merchandising.

Anime fans are big spenders when it comes to merchandise, with 94% having bought anime-related products in the past year, and a quarter spending over \$1,000. While the anime fanbase is smaller in the US, it is growing—and fans are passionate. If appropriate, brands can leverage this enthusiasm through exclusive merchandise drops and collaborations with anime properties.



Closing Thoughts

Across gaming, sports, and anime, a clear cultural thread emerges—fandoms are no longer siloed but are increasingly fluid, overlapping, and engaged in ways that reshape how we understand entertainment. Gaming, once viewed as a niche hobby, is now a critical component of how people express themselves, form social bonds, and engage with content across mediums. Sports are experiencing a similar transformation, with sports docuseries and athlete-generated content drawing in younger, more diverse audiences who crave the personal stories behind the action. And anime, once a subculture, has exploded into the mainstream, pulling in gamers, sports fans, and a wide range of media consumers in the process.

What's most striking is the way these cultural forms interact and amplify one another. Sports fans are diving into anime; gamers are craving more sports docuseries; and anime fans are embracing gaming and sports content in ways that blur the lines between fandoms. It's no longer about targeting distinct audiences but about understanding how these fandoms converge and grow through their shared enthusiasm for immersive, character-driven narratives. For marketers, this means tapping into the emotional and communal core of these overlapping fan bases through shared IP.

The throughline here is that consumers want depth and engagement. They want behind-the-scenes access, creative experimentation, and the ability to connect with their favorite content—and each other—across platforms and mediums. For brands, the opportunity lies in embracing this shift, creating campaigns that transcend traditional boundaries, and meeting consumers in these rich, multifaceted spaces where fandoms collide.

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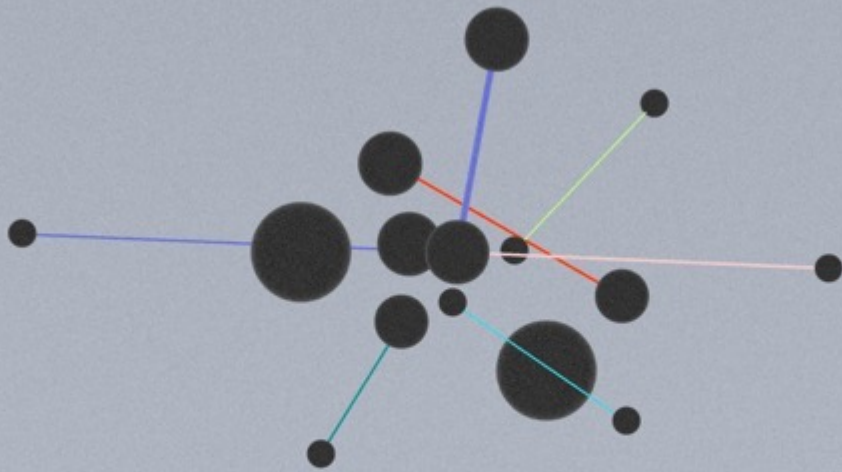
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