MUGGLENET · INSIGHTS
A BRIEF FOR BRANDS IN THE WIZARDING WORLD CATEGORY

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THE HOGWARTS HOUSE REPORT

The House Effect

How fans actually sort themselves — and why House affinity has become a useful segmentation tool for anyone selling, licensing, or designing Harry Potter merchandise.

SELF-IDENTIFICATION AMONG U.S. ADULTS

21%	8%	7%	6%	57%
GRYFFINDOR	HUFFLEPUFF	SLYTHERIN	RAVENCLAW	UNSORTED

Source: Morning Consult national poll of U.S. adults, 2023.

PREPARED FOR BRAND & LICENSING TEAMS

MuggleNet has covered the Wizarding World since 1999.
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WHAT THIS BRIEF IS FOR

Six things to know *before* you greenlight the next SKU.

Hogwarts house is a wearable identity for fans. National survey data shows house affinity varies sharply by generation, life stage, and depth of fandom, and that matters for what you stock, who you market to, and which color of merch sits on the shelf.

FINDING 01

More than half of adults are still unsorted.

57% of U.S. adults say they're "not sure" which house they identify with — the single largest segment in the data. That's both a marketing problem (the funnel is leaky) and a product opportunity (house-agnostic SKUs have the biggest addressable audience).

FINDING 02

Gen Z sorts more — and sorts differently.

65% of Gen Z picks a house (vs. 43% nationally), and they pick differently: Gryffindor 19%, Hufflepuff 19% (tied at the top), Slytherin 17% (vs. 1% of boomers), Ravenclaw 10%. The Slytherin Surge gets the headline, but Hufflepuff parity with Gryffindor and Gen Z's higher overall sort rate are equally commercial.

FINDING 03

Depth of fandom collapses indecision.

Among avid fans, 81% pick a house (43% Gryffindor, 15% Hufflepuff, 12% Slytherin, 11% Ravenclaw). Among non-fans, only 11% do. The closer you sit to the fandom, the more confidently — and consistently — you buy in colors.

FINDING 04

Life stage predicts house better than education.

Students skew Hufflepuff (23%) and Slytherin (20%). Self-employed and homemakers lead with Gryffindor (29% / 28%). Government workers are the one working group where Gryffindor under-indexes — Hufflepuff (19%), Slytherin (12%) and Ravenclaw (11%) all over-index. Retirees barely sort at all.

FINDING 05

Gryffindor is the safe bet. The others are the upside.

Gryffindor is the largest single house claim across every cut of the data. That makes it default inventory and also the most commoditized. Margin lives in the other three, where smaller, sharper audiences will pay more for the right reference.

FINDING 06

The category is heating up, not cooling.

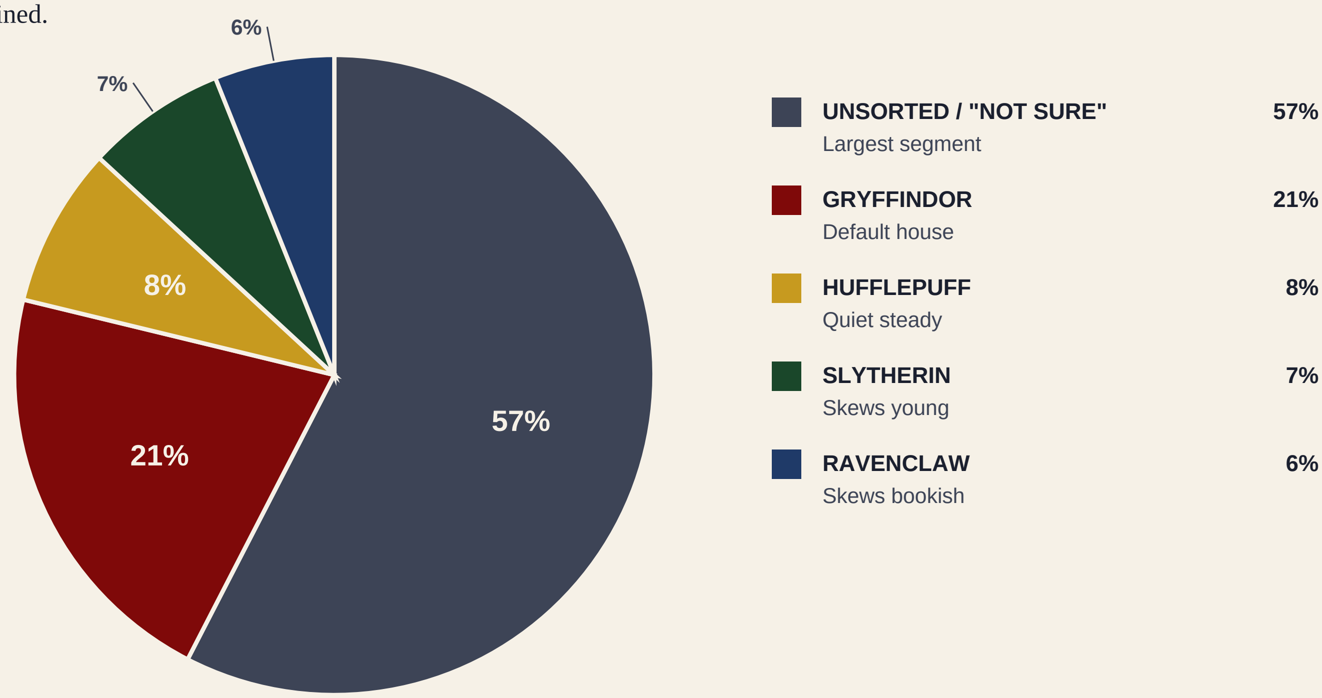
A new HBO Original *Harry Potter* series debuts Christmas 2026, resetting the toys, games, and collectibles slate for the first time in a decade. House-led product strategy is going to matter more, not less.

Most adults are *not* in a house.

Before slicing the data by generation or fandom intensity, look at the raw national picture. The Sorting Hat hasn't reached most of America.

When Morning Consult asked U.S. adults in 2023 "with which Harry Potter house do you most identify?", the largest answer wasn't a house at all. 57% said they weren't sure. Gryffindor came out on top of the houses that actually got picked, at 21%, followed by Hufflepuff (8%), Slytherin (7%) and Ravenclaw (6%).

For a brand, two implications fall out immediately. First, the unsorted majority is real and it is the largest commercial audience in the data; non-house product (Hogwarts crest, golden snitch, generic wand) has more potential buyers than any single house. Second, among the people who *do* sort, the curve is steep: Gryffindor is roughly the same size as the other three houses combined.



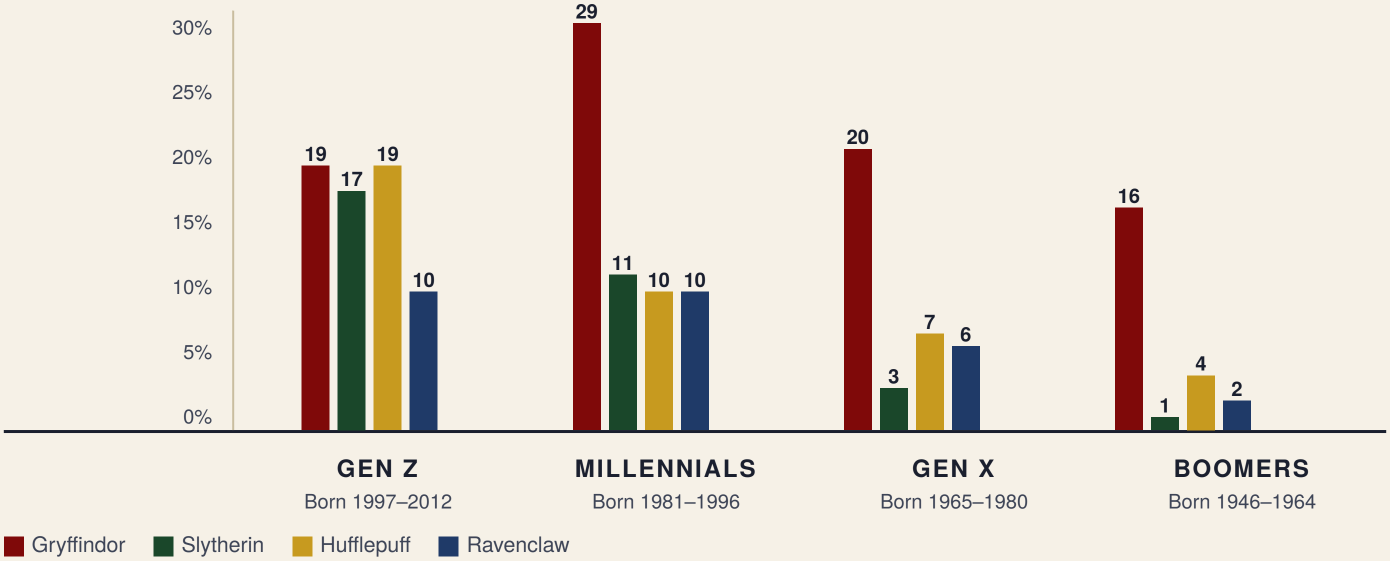
Share of U.S. adults who pick each option. Source: Morning Consult, 2023.

WHY GRYFFINDOR WINS BY DEFAULT

Three things stack in Gryffindor's favor: Harry, Ron and Hermione are all Gryffindors, which means the house gets the most screen time. Gryffindor red and gold reads as the franchise's "primary" color palette in much licensed product. And Gryffindor traits (brave, bold, daring) map closest to the generic "hero" archetype most people are willing to claim about themselves. The practical effect: Gryffindor inventory is the easiest to sell but the hardest to charge a premium on.

The Slytherin *surge* is real and generational.

The biggest house-level shift in the data isn't an overall trend — it's a Gen Z phenomenon. Older fans grew up reading Slytherin as the villain house. Younger fans grew up watching it get reframed online.



Share of each generation identifying with each house. All values from Morning Consult National Tracking Poll #2304108 (April 2023), Table MCEN11. Slytherin going from 1% (boomers) to 17% (Gen Z) is the largest cross-generational house shift in the data.

17% GEN Z WHO IDENTIFY AS SLYTHERIN	17× GEN Z SLYTHERIN RATE VS. BABY BOOMERS (1%)	$12T PROJECTED GEN Z GLOBAL SPENDING POWER BY 2030[3]

Why it happened: aesthetics ate the algorithm

Gen Z grew up in the years when Slytherin stopped being shorthand for "bad guy" and started being shorthand for a look. The #darkacademia hashtag on TikTok — gothic boarding-school imagery, vintage books, tweed, hunter green — had passed 1.8 billion views by 2022.[4] Slytherin's palette sits right inside that aesthetic, and Pinterest and BookTok have spent years pulling Draco Malfoy, Sebastian Sallow and a long tail of fan-created characters into a "misunderstood, ambitious" reframe.

The crosstab also surfaces a second story: **Hufflepuff ties Gryffindor for the top spot in Gen Z at 19% each** — against an 8% Hufflepuff baseline nationally. That tracks with the BookTok / cottagecore aesthetic running adjacent to dark academia. Gen Z is also the most-sorted generation (65% picked a house vs. 43% nationally): both larger and more decisive than any older audience.

The commercial signal: when 17% of the cohort projected to reach $12T globally by 2030 picks the same minority house and another 19% picks the most under-served one, you have two buyer profiles. Lean into dark academia for Slytherin (muted emerald, antique silver, serif type, signet motifs) over the cartoonier "evil house" treatment that worked on millennials.

Where someone is in life *predicts* the house they pick.

Cut the same survey by employment status and clear patterns appear. House affinity reads more like a stage of life.

The occupation cut from Morning Consult's 2023 poll surfaces the sharpest differences in the entire dataset, sharper than education, sharper than region. Students lean hard into the houses that get reclaimed online (Hufflepuff and Slytherin), public-sector workers over-index on Hufflepuff in a way that tracks with how the house is written, and the people running their own businesses or households claim Gryffindor at rates well above the national average.

GROUP	GRYFFINDOR	HUFFLEPUFF	SLYTHERIN	RAVENCLAW	WHAT STANDS OUT
Students	**20%**	**23%**	**20% ▲**	**8%**	Hufflepuff narrowly leads; Slytherin nearly ties (+13 pts vs. baseline)
Self-employed	**29%**	**8%**	**5%**	**8%**	Gryffindor over-indexes (+8 pts)
Homemakers	**28%**	**9%**	**4%**	**5%**	Gryffindor over-indexes (+7 pts)
Government workers	**15%**	**19%**	**12% ▲**	**11% ▲**	The only working group where Gryffindor *under*-indexes; H, S and R all over-index
Retirees	**15%**	**3%**	**1%**	**2%**	Largely unsorted (all houses under-index)
Postgraduate-educated	**29%**	**11%**	**5%**	**7%**	Gryffindor over-indexes (+8 pts)

***Filled cell** = the group's top house pick. **Tinted cell + ▲** = significantly over-indexes vs. the national baseline (G 21% / H 8% / S 7% / R 6%), even if not the row's top pick. Source: Morning Consult National Tracking Poll #2304108, April 2023.*

What to do with that

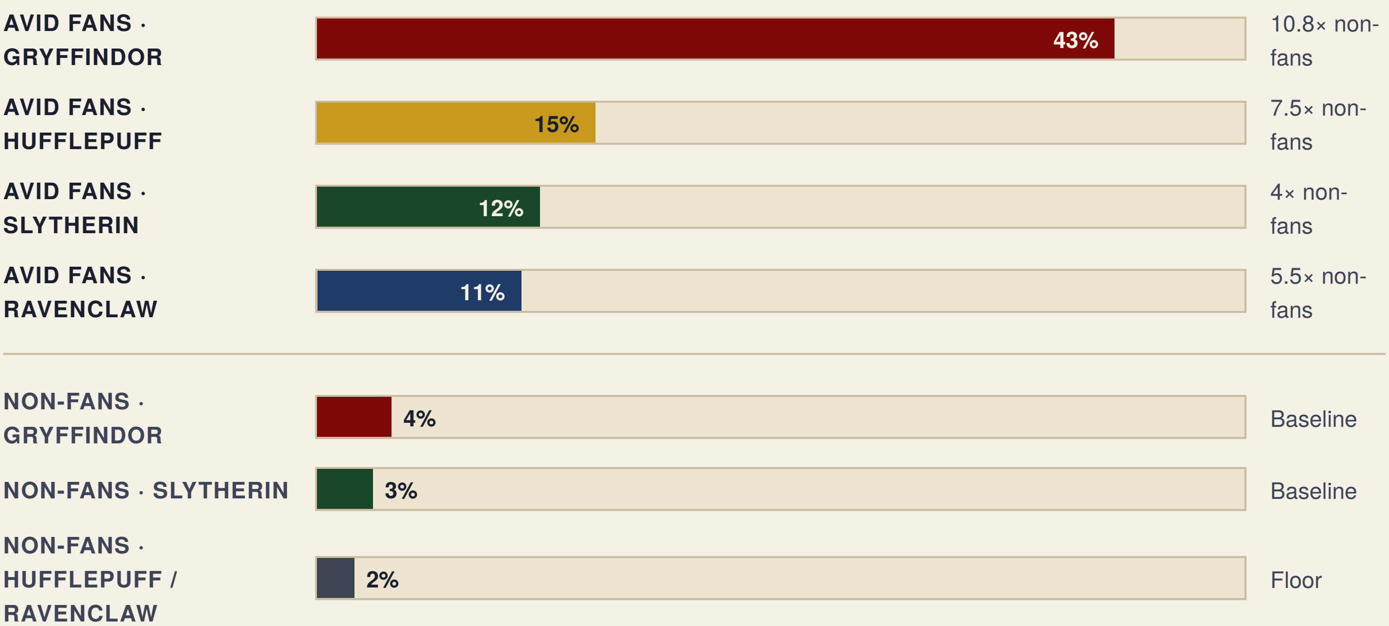
The student finding is the most actionable cut in the entire study. Hufflepuff (23%) and Slytherin (20%) *together* account for 43% of students who picked a house, against a national baseline of 15%. This is the back-to-school, dorm-gear and study-merch cohort, and 37% of Gen Z plan to shop in-store more this holiday than last.[5] Make merch that lives in a backpack or a dorm and your dominant houses are Hufflepuff and Slytherin, not Gryffindor.

The other striking cell is government workers: Gryffindor under-indexes (15% vs. 21% nationally) while the other three houses all over-index — Hufflepuff 19%, Slytherin 12%, Ravenclaw 11%. It's the only working group where Gryffindor isn't the top pick (see page 7).

The closer they sit to the source, the *more* they buy in colors.

The single largest predictor of whether a person picks a house is how deep into the fandom they already are.

Avid Harry Potter fans pick a house 81% of the time (43% Gryffindor, 15% Hufflepuff, 12% Slytherin, 11% Ravenclaw). Non-fans pick one 11% of the time (4%, 2%, 3%, 2%). That is a roughly 7-to-1 ratio, and it explains a fact most merchandisers already feel in their sales data: house-coded product converts overwhelmingly on existing fans. The marketing dollar spent trying to convert non-fans to a specific house is mostly wasted.



Source: Morning Consult, 2023. Bar widths shown to scale across both audiences for direct comparison.

Book fans pick Ravenclaw at higher rates than movie fans

One more cut worth flagging. Avid *book* readers pick Ravenclaw at 14%, while avid *movie-only* fans pick it at 12%. The gap is small but directional, and it lines up with how the house is written versus how it's filmed: the books spend more time on Ravenclaw's wit and learning; the films, less. For publishers, indie booksellers, stationery brands and anyone selling in the "smart reader" niche, Ravenclaw indexes harder among the segment that actually still buys printed books.

66%

of Gen Z and Gen Alpha say they spend more time with fan-created content than official content.[6] House claim is increasingly shaped on TikTok, Pinterest and BookTok, not by official marketing, which is exactly why minority-house aesthetics have moved as fast as they have.

Six *plays* for the next 18 months.

A new HBO Original Harry Potter series arrives in 2026. The next 18 months are when assortments get locked in.

PLAY 01 · GEN Z · SLYTHERIN

Treat Slytherin as the Gen Z hero SKU, not a third-tier color.

17% of Gen Z self-identifies with Slytherin (vs. 1% of boomers). Lean into the dark-academia aesthetic the cohort already responds to: muted emerald, antique silver, serif/blackletter type, signet and crest motifs, 19th-century boarding-school finishes, not Saturday-morning villain. Price for premium; the audience is paying for identity.

PLAY 02 · GEN Z · HUFFLEPUFF

Build a Gen Z Hufflepuff line, the big opening in the data.

Hufflepuff ties Gryffindor for the top spot in Gen Z at 19% each (vs. 8% nationally — the largest absolute over-index of any house in any generation). Most current Hufflepuff product reads kid-coded: cartoon badgers, primary yellow, sticker energy. Build a parallel cottagecore /BookTok-aimed Gen Z line: honey and parchment tones, hand-illustrated botanicals, soft fabrics, romance-novel typography. Same audience as Play 01, opposite mood.

PLAY 03 · STUDENTS · BACK-TO-SCHOOL

Re-anchor back-to-school around the student-skew houses.

Among students, Hufflepuff (23%) and Slytherin (20%) outpoll Gryffindor (20%). Most back-to-school category buys still default to Gryffindor red as the lead color. Flip the mix: lead Hufflepuff and Slytherin in dorm decor, study lamps, planners, drinkware, backpacks; hold Gryffindor as the safe staple, not the front of the endcap. 37% of Gen Z plan to shop in-store more this holiday than last.[5]

PLAY 04 · THE 57% · HOUSE-AGNOSTIC

Build a deliberate house-agnostic line for the unsorted majority.

57% of adults have no house. Most licensees treat house-agnostic product (crest, Marauder's Map, snitch, wand, platform 9¾) as fill-in inventory. The data says it should be a planned, named line with its own merchandising story, it's the only product universe that fits more than half of all potential buyers without qualification.

PLAY 05 · INSTITUTIONAL & GIFTING

Build a professional Hufflepuff line for institutional channels.

Government workers are the only working group where Gryffindor under-indexes (15%); Hufflepuff (19%), Slytherin (12%) and Ravenclaw (11%) all over -index. Position a professional, understated Hufflepuff range — honey-and-black, no cartoon badgers — for corporate gifting, public-sector institutional buys and desk goods. A small companion Ravenclaw range in the same channel is justified.

PLAY 06 · BOOK & READER CHANNELS

Treat Ravenclaw as the bookstore and stationery channel's house.

Avid book fans pick Ravenclaw at 14% vs. 12% for movie-only fans, and Ravenclaw ticks up with education level. It is the smallest house in absolute terms, which is exactly why exclusivity positioning works. Independent bookstore exclusives, fine pens, library-style ephemera, limited drops in deep blue and antique bronze. Don't make it cheap.

Methodology & *sources*.

This brief synthesizes one survey dataset with supporting third-party data points.

Core dataset. All house-identification figures in this brief are drawn from Morning Consult National Tracking Poll #2304108 (April 2023), Table MCEN11: "With which Harry Potter House do you most identify?" Total adult sample n ≈ 2,200. The toplines — 57% not sure, 21% Gryffindor, 8% Hufflepuff, 7% Slytherin, 6% Ravenclaw — and all generation, employment, fandom-intensity and education cuts cited here come from the crosstabs. The dataset was summarized in MuggleNet's May 2026 analysis, *"Gen Z Has a Surprising Slytherin Streak."*

How to read the percentages. "Not sure" was an explicit response option, so the four house figures do not sum to 100% — the unsorted share absorbs the difference. The generational cuts (Gen Z 1997–2012; Millennials 1981–1996; Gen X 1965–1980; Boomers 1946–1964) are tracked separately from the cross-tab's age bands (18–34, 35–44, etc.) and are not interchangeable. This brief uses the generation cuts throughout.

What this brief does not do. This is not sales data. It does not measure how much money each cohort spends on Harry Potter product. It measures how people self-identify, which historically maps closely to which licensed product they choose to buy and wear but is not a substitute for category-level point-of-sale analysis. Use it for positioning, color and assortment direction, not for forecasting unit volume.

ENDNOTES

1 **Hogwarts Legacy sales and revenue.** Warner Bros. Games officially confirmed in December 2025 that Hogwarts Legacy had crossed 40 million units sold. Revenue figure of $1.3B+ from Warner Bros. Discovery CEO David Zaslav (SVB MoffettNathanson TMT conference, 2023, via Hitmarker).

2 **Hasbro & Warner Bros. Discovery licensing partnership.** Hasbro announced a multi-year deal in February 2026 making it the global primary toy licensee for Harry Potter starting in 2027, coinciding with the launch of the HBO Original Harry Potter series. Business Wire press release, 10 February 2026.

3 **Gen Z global spending power.** Bank of America Institute (via eMarketer, March 2025) projected Gen Z global spending to grow from $2.7 trillion in 2024 to $12.6 trillion by 2030. NielsenIQ, in collaboration with World Data Lab, reaches a similar ~$12T figure for 2030.

4 **#darkacademia scale on TikTok.** By 2022, the #darkacademia hashtag on TikTok had surpassed 1.8 billion views. Reported in coverage of the aesthetic's rise (e.g., Reviewed / Mallize, "What is dark academia").

5 **Gen Z in-store holiday shopping.** PwC 2025 Holiday Outlook: 37% of Gen Z planned to shop in-store more frequently than usual this holiday season, up from 27% in 2024.

6 **Fan-created vs. official content.** Fortune, "How fandom became culture's power center" (February 2026): 66% of Gen Z and Gen Alpha say they spend more time with fan-created content than official content.

About MuggleNet. MuggleNet has covered the Wizarding World since 1999, with one of the largest organic fan audiences in the category. MuggleNet Insights briefs translate that audience and the broader Harry Potter consumer landscape into research, positioning and assortment guidance for brand, licensing and retail teams. MuggleNet is an unofficial Harry Potter fansite and is not affiliated with Warner Bros. Entertainment or J.K. Rowling.

The Sorting Hat is data. Use it that way.

This was Issue No. 01 of MuggleNet Insights — research and positioning briefs for brands, licensees and retailers in the Harry Potter category.

Future issues will cover the new HBO series' effect on character-level merch demand, fandom intensity by region, and what fans actually buy versus what they say they identify with.