

# TLL THE LICENSING LETTER

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## London Shopping: Uncovering New Categories Ripe for Export, Others That Need a U.S.-Style Energy Boost

While in London for Brand Licensing Europe, we toured the London-area locations of several British retail chains, including the supermarkets Tesco (the new 80,000-square-foot Extra superstore in Watford as well as a more traditional format in London), Sainsbury's, and Waitrose, as well as department stores Marks & Spencer, Harrod's, and Fortnum & Mason, and some specialty shops.

For photos of some of the displays discussed here, subscribers can visit the EPM member website at [bit.ly/1aZBrSQ](http://bit.ly/1aZBrSQ) (login required).

### Foods: A Lack of Character

Character licensing is surprisingly AWOL in the food aisles at Tesco, Sainsbury's, and Waitrose, with few licensed characters in any of the categories where their presence might be expected (e.g., cereals or dairy).

The notable exception was the celebration cake section, where examples of licensed SKUs ranged from Peppa Pig and Wallace & Gromit to Forever Friends and Batman. In other categories, there were a smattering of examples, such as a box of Simpsons fruit snacks among a variety of branded and private label examples, but for the most part character licensing was not a factor in foods.

Numerous instances of licensed food and restaurant extensions, and extensions of other types of brands, are evident in the food aisles across all supermarkets where we stopped, including sauces tied to the Wagamama and Nando's restaurant chains at Tesco, a Marmite chocolate bar at Sainsbury's, and Weight Watchers products in the soup, frozen dairy, and other aisles at Tesco Extra.

Waitrose's direct-to-retail deal with the Prince of Wales for the Duchy Originals brand of organic biscuits, jams, milk, bacon, and sausages is reflected in several departments in that chain, as well as on an endcap featuring all of

the shelf-stable products. Royalties support the Prince's charities.

### Licensing Notable in Nonfoods

The supermarkets visited feature a large proportion of licensed products in nonfoods categories, often endcapped or in separate sections.

Sainsbury's displays at least three endcaps of licensed nonfoods products. One features Moshi Monsters novelties, arts and crafts for the British art property Juicy Lucy, and a number of Star Wars items including a Darth Vader "stress head," as well as a range of science kits tied to The Science Museum and Guinness World Records. Other sections in the same store included two shelves of Hello Kitty merchandise, two shelves of LEGO/Star Wars items, and a couple of shelves of products tied to the children's book, *The Gruffalo*. Also noted was a section of ice cream trucks and other collectibles for Wall's, Unilever's British version of the U.S. ice cream brand Good Humor.

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## EQUAL PARTNERS

### Physical and Digital Toy Components Must Work Independently *and* Together

Back in February 2012, "augmented reality" was the hot trend at the New York Toy Fair, with most of the major toy companies touting, for the first time, their lines of app-connected toys as a centerpiece of their product ranges.

By Toy Fair 2013, everything from fashion dolls to board games to action figures had some sort of digital add-on that enhanced play. Technology had become a fact of life, with apps becoming an almost universal requirement and few companies even calling out these features as a point of difference.

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## in short

The Three Stooges Monopoly game is \$10.99 at off-price retailer Amazing Savings in Brooklyn, NY, \$24.98 on Amazon, full list of \$40 at Sears, and \$44.99 at Toys "R" Us online.



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# ➡ Licensing Ledger

## LICENSING BY THE NUMBERS

*It's earnings report season ahead of the critical fourth quarter. The following licensing-centric notes draw on analysts calls, speeches, media reports, and other sources.*

### ICONIX

Outside the U.S., Iconix now has 30 DTR agreements, 800 international licensees, and distribution in 1,300 stand-alone stores for its brands. Its international sales are projected to more than double this year and to account for more than a third of the overall business—up from 6% a few years ago. The company projects international sales will account for 40% of revenues in 2014. Domestically in the third quarter, Danskin Now (a DTR with Walmart) is up double digits. The leading projected growth driver for 2014: Peanuts.

### DREAMWORKS

Dreamworks' consumer products segment—broken out for the first time—contributed revenue of \$12.0 million and gross profit of \$3.0 million to the third quarter, primarily from *Turbo* and *Classic Media*. That translates to 7.8% of revenue and 4.8% of gross profit for the studio as a whole.

### HASBRO

Hasbro paid Disney \$165 million in the past 12 months, including some payments scheduled under an older contract for *Iron Man* and *Wolverine* but also reflecting a revised agreement covering additional properties. Licensing *Tonka* to a third party, *Funrise*, dragged down the preschool category. "Our *Tonka* revenue is now higher-margin royalty revenue," says CEO Brian Goldner, "but on a year-over-year basis it is lower dollars." That said, the company is looking to license out one or two other brands. Overall, international is fueling growth.

### JONES GROUP

Licensing income for the Jones Group totaled \$10.7 million in the third quarter, equivalent to 1% of the company's net sales, with segment income of \$1.4 million.

### MARTHA STEWART

Merchandising revenue at Martha Stewart Living Omnimedia grew 7% in Q3 to \$14.1 million, despite an overall decline in year-over-year revenues of 23%. Pet products at PetSmart were up, sales at Home Depot were down but trending up in kitchens and paint, and Walgreens launched *Martha Stewart Essentials* supplements developed by *Inergetics* in September. Under its previously announced revised agreement (shorter, covering fewer categories), MSLO will receive minimum royalties and design fees of \$50 million from *JC Penney*, to be paid over 4.5 years.

### NORTH DAKOTA STATE

NDSU's *Bisons*-branded apparel and merchandise generated \$418,000 in royalty income for the school last year, which was triple the amount of five years ago. THE LICENSING LETTER estimates that the royalty income translates into \$6.5 million to \$7 million in retail. The team has more than 270 retailers and licensees, reports AP.

### COCA-COLA

Coke is getting a wealth of publicity for its licensed products surrounding the release of a 200-piece, high-end *Coca-Cola* by *DRx* collection of vintage clothing pieced together from genuine retro items. Coke's licensing chief, *Kate Dwyer*, has been talking it

up; here are some of the numbers pieced together from various reports on the collection:

- ▶ Coke licensees sell 200 million to 300 million items a year featuring the brand;
- ▶ Worldwide sales of licensed Coke goods were up 16% in 2012 and are projected to grow 10% this year; and
- ▶ Apparel represents more than half of the business, up from 20% a few years ago.

### MACY'S

Women are moving back to buying apparel and away from handbags, shoes, and jewelry, *Macy's Terry Lundgren* tells the *WWD* CEO Summit. *Lundgren* singles out exclusive private brands as the No. 1 growth driver for the department store chain, citing licensed DTR deals for *Tommy Hilfiger*, *Rachel Roy*, and *Sean John*. The only drawback: "The worst idea is to have exclusive product that doesn't sell. There is nowhere for it to go. It's stuck."

### DISNEY

Retail sales for *Disney Junior* products exceeded \$1.8 billion in fiscal 2013, more than double the year before, per *Disney*. That's surprising perhaps only in that it did \$900 million in fiscal 2012, before the *Disney Junior* network hit stride. "*Disney Junior* properties are absolutely on fire," say *Disney* execs. "They are experiencing double digit growth rates now on the licensing side. We expect that to continue." *Planes*, the company adds, "has turned out to be an incredible [licensing] juggernaut ... because it not only has its own following and its own characters and its own new merchandise that it adds to the market, but because it's from the world of *Cars*, it tends to reinvigorate the interest in those characters as well and [will continue to do] very well in 2014."



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## In the U.K., Museums Move Merchandise

The museum licensing sector in the U.K. is broader than in the U.S., with products available in a wider swath of categories and distribution channels than is the case stateside. And the market is growing, with more U.K.-based museums entering the licensing arena recently and several existing programs expanding their reach.

Museum licensing in North America tends to be focused largely on gifts and decorative items, with most sold through museum stores (bricks-and-mortar and e-commerce), as

well as some gift shops and other specialty outlets. But in the U.K., museum-branded products are more likely to be available in supermarkets and department stores, with products ranging from electronics accessories to high-end apparel to fragrances.

Science Museum-licensed science kits for children are available at Sainsbury's supermarkets, the Imperial War Museums have a fragrance line created by licensee SLG Beauty that is exclusive to Marks & Spencer department stores, and the Museum of London has a jewelry collection

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SELECTED U.K.-BASED MUSEUM LICENSING PROGRAMS		
Museum/Contact	Description	Licensing Highlights
<b>British Library</b> , Martin Oestreicher, Sales Manager Brand Licensing, +44 20 7412 7704, martin.oestreicher@bl.uk	Collection features 150 million items, including 15 million books, plus stamps, comics, propaganda, maps, photographs, patents, newspapers, music, documents, etc. Holdings include medieval manuscripts, first edition Dickens and Austen books, an original copy of Handel's Messiah, and two of the four existing Magna Cartas (2015 will mark the 800th anniversary of this document).	Has been licensing in earnest for about a year; licensees include Bagabook (book covers), Big Strawberry (e-reader cases), Flametree (calendars), Fox and Chave (silk scarves and ties), Frances Lincoln (diaries), Jill Campion (tiles), MGL (greeting cards), Paperblanks (notebooks), Paula Bolton (jewelry), Pomegranate (calendars, jigsaws, greeting cards), Star Editions (greeting cards, POD), Surface View (wall art), and Wentworth (wooden jigsaws).
<b>Imperial War Museums</b> , Elizabeth Bowers, Head of Publishing and Brand Licensing, +44 20 7416 5314, ebowers@iwm.org.uk	Collections commemorating all U.K. wars from 1914 onward. Upcoming hooks including the 100th anniversary of the outbreak of World War I in 2014, which will be an international event. Museums include Churchill War Room, the HMS Belfast, the main London museum, and two locations outside London (an airfield and a Manchester museum).	Licensees include Alternative Image Company, Adam Mathews, Ancestors, Anova, Cranham Publications, Customworks, Denby Pottery, Flame Tree Publishing, Frances Lincoln, Globee, GO Entertainment Group, Hornby Hobbies Ltd, J Salmons, Lovarzi, Only 4 You, Pomegranate, Proquest, Pyramid International, Realm and Empire, SLG Beauty (for Marks & Spencer), Sophisticated Games, Star Editions, and Turtlemat. Collections are usually based on themes and have hangtags or inserts explaining the historical context and human connection signified by the item.
<b>Museum of London</b> , Harriet Berry, Licensing Manager, +44 20 7814 5518, hberry@museumoflondon.org.uk	Includes archaeological finds such as Roman mosaics found in the City of London, as well as modern objects, paintings, costumes, and social and urban history. Has two London locations and a research and archive center.	Currently has a jewelry program with QVC based on the Cheapside Hoard of Elizabethan jewelry; ties and scarves; and other products.
<b>National Museums Northern Ireland</b> , Patrick McLain, Head of Business & Tourism Marketing, +44 28 9039 5111; patrick.mclain@nmni.com	Group features four museums. Best known for its Titanic Collection, it also has contemporary and abstract art, Celtic jewelry, and Irish crafts such as textiles, lace, embroidery, and patchwork.	Pomegranate is on board for calendars and jigsaws. The museum has been licensing its picture library for a while, but merchandise licensing is a new venture.
<b>National Portrait Gallery</b> , Matthew Bailey, Picture Librarian, +44 20 7312 2475, mbailey@npg.org.uk	Founded in 1856 for collections of portraits of British men and women, including images dating to the 16th century. The collection includes paintings, sculptures, photographs, and prints.	Holdings include more than 300,000 portraits available for licensing. Online and offline archives are available for licensee searches.
<b>Natural History Museum</b> , Zuzi Wojciechowska, Licensing Manager, +44 20 7942 5652, zuzi.wojciechowska@nhm.ac.uk	Largest collection of natural history artifacts in the world; 5 million visits per year; 50,000 images in the collection that can be used for designs; 300 scientists are on staff who consult on licensed products.	Kids' program focuses on science content, with 20-plus licensees on board. For adults, products have a design skew, with current licensees making jewelry, stationery, cards, and apparel. New program is tied to the Wildlife Photographer of the Year program, which celebrates its 50th anniversary in 2014.
<b>Science Museum Group</b> , Gemma Woodward, Licensing Manager, +44 20 7942 4317, gemma.woodward@sciencemuseum.org.uk	Includes the Science Museum, London; Museum of Science and Industry, Manchester; National Railway Museum, York; and National Media Museum, Bradford. The collections span 2,000 years.	Licensing, publishing, and print sales generate royalties and awareness to support the collections. Handled by NMSI Enterprises Ltd. Opportunities include preschool, toys, educational games and science kits, gifts and gadgets, homewares. In addition to the Science Museum, there are programs for the National Railway Museum and The Flying Scotsman. A recent product was a beer with World Top Brewery, inspired by the Mallard train.
<b>Victoria &amp; Albert Museum/V&amp;A Enterprises</b> , Lauren Sizeland, Director of Licensing, +44 207 942 2967, l.sizeland@vam.ac.uk	Museum of art and design, with the ability for licensees to provide a contemporary interpretation of the holdings.	More than 2,000 products licensed including home decor, furniture, stationery, crafts, toys, prints, ceramics, apparel and accessories, glass, textiles, publishing, etc. More than 180 books in print, with 35 new physical and digital releases per year. Licensees include Wild and Wolf, Art Angels, Bedeck, Ulster Weavers, Berkley Square, Ethel Gloves, MGL, Westminster Fibers, and Graphis, among others.

SOURCE: The Licensing Letter

## Equal Partners

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The use of digital features and products in the toy industry has continued to evolve, with the centerpiece of the trend no longer augmented reality but rather “physical-plus-digital,” in which toys and digital technologies are near equals, rather than the interactive element enhancing physical toy play. Either the physical and digital components are both necessary for play or both combine to give a much better play experience, even if they can be used separately.

Activision’s Skylanders franchise, launched in 2011 and passing \$1.5 billion in retail sales of the core line by September 2013, kick-started this trend, followed by examples such as Disney Infinity, introduced in August of this year. Hasbro’s Telepods line sold more than 1 million units in its first month since debuting in conjunction with Angry Birds Star Wars II in September 2013 and will be part of the Angry Birds Go! franchise, coming out this December. (All of these brands have launched outbound licensing programs.)

Skylanders and Disney Infinity are both console-plus-toy games, while the two Angry Birds titles—as well as a LEGO Minifigures toy-plus-digital line expected next summer—feature an app-plus-toy configuration.

While each new introduction will be subject to innovation, it seems that the pairing of physical and digital components will be at the core of most toys and games that feature a competitive or collectible element. Both formats will play equal and complementary roles, and each will help drive sales of the other.

## Telly To Toaster Fashion Bloggers Turn to Licensing to Dress Up Their Images

For the last year and a half or so, we’ve been noting the rise of licensing programs based on names, personalities, and brands established through blogging. Lately, fashion bloggers have comprised one particularly active area of the blogosphere when it comes to licensing.

In the last two months:

- ▶ Leandra Medine, founder of The Man Repeller blog, teamed with Superga for a collaborative line of sneakers to be sold at Superga shops and high-end department stores, including Neiman Marcus and Bloomingdale’s;
- ▶ Michelle Phan, who specializes in beauty and lifestyle blogging and has 4.5 million subscribers on her YouTube channel, partnered with L’Oreal for a cosmetics range to be sold online; and
- ▶ Garance Doré, a fashion photographer and blogger, signed with Spiegel & Grau (an imprint of Random House) for a book deal, following her husband Scott Schuman, founder of The Sartorialist blog, who has

two books. (Books tend to be bloggers’ first step toward brand extension.)

Talent management and licensing agency IMG has made fashion and style blogging something of a niche specialty, especially through its divisions focusing on model and talent management. Some of its clients include Bryan Grey Yambao (Bryanboy), Natalie Joos (Tales of Endearment), Nicole Warne (Gary Pepper Girl and Gary Pepper Vintage), and Romy Frydman (Style Me Romy). Yambao has a deal in place with Adrienne Landau for furs, while Warne has participated in several collaborations, including with Dolce & Gabbana and Lancôme.

## Still Crafty Fans Are Impetus for Marrying Arts and Crafts to Licensed Properties

The arts and crafts sector remains a key area of focus for many licensors, despite rumblings among some observers that the category has become oversaturated with licensed products.

Licensing has certainly become a significant factor in the industry over the last several years. In a recent visit to Michael’s, notable examples included:

- ▶ Martha Stewart, with several extensive shelf displays in the scrapbooking, jewelry-making, Halloween, and other aisles;
- ▶ Large adjacent displays of American Girl and Hello Kitty crafts (more than half an aisle together, with American Girl taking up two-thirds of that);
- ▶ A smaller grouping of Mary Engelbreit, in the impulse aisle next to checkout;
- ▶ An endcap, near the woodworking aisle, of sports-licensed items including iPhone covers, mini-sticker books, and the like, tied to the NFL Players Association and local university and pro baseball and football teams; and
- ▶ A variety of one-off licensed products in several aisles.

In the context of this already crowded market, however, a number of licensors—ranging from Cartoon Network to Rovio to Hasbro—have, within the last year, cited the arts and crafts arena as being one with growth potential, whether for craft kits, activity books, or crafting tools and supplies. Meanwhile, licensees in each of these segments, such as Fashion Angelz, Klutz, and Cricut, continue to add new properties to their portfolios.

The spur for this ongoing interest in marrying licensed properties and arts and crafts often comes directly from the fans of the respective properties. By making their own costumes, room décor, or clothing featuring their favorite characters and then posting images of their creations on social media, these fans are demonstrating to licensors and licensees their potential willingness to purchase licensed DIY crafting projects.

# Licensing News

## Properties Available Or Recently Assigned, U.S.

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
MasterChef	Cooking challenge/reality program featuring Gordon Ramsay, Joe Bastianich, and Graham Elliot.	Beverage, cooking experiences, food, housewares	Ross Misher, Brand Central
MasterChef Junior	Younger version of MasterChef with contestants ranging in age from 8 to 13.	Board games, food/beverage, toys	Ross Misher, Brand Central
U.S. Fund for UNICEF	United Nations fund for children and mothers in developing countries.	All	John Parham, Parham Santana

## Licenses Recently Granted, U.S.

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Arm & Hammer	Hefty/Reynolds Consumer Products	Scented trash bags	Brandgenuity
Beatles Yellow Submarine	Boelter Brands	Bowls, ceramic mugs, coasters, drinkware, glassware, table accessories	Bravado International Group Merchandising Services
	Trends International	Bookmarks, calendars, decals, journals, posters, stickers, writing instruments	
Boo - The World's Cutest Dog	Accutime Watch	Watches	Knockout Licensing
Caribbean Joe	Beatrice Home Fashions	Bath products, pet products	Sequential Brands Group
	International Home Miami	Outdoor furniture	
	Tervis Tumbler	Tumblers	
	Victoria Classics	Bedding	
DC Comics Super Heroes	Schleich North America	Figurines	Warner Bros. Consumer Products
Domo	Brainstorm Products	Glass sculptures, kites	Big Tent Entertainment
Downton Abbey	Republic of Tea	Tea	Knockout Licensing
Duck Dynasty	Town & Country Living	Home furnishings	Brandgenuity
Elvis Presley	PaperStyle	Custom greetings	Elvis Presley Enterprises
	Fathead	Wall decals	
	Legends Home Bedding	Bedding	
	Mimoco*	Flash drives	
	Opening Ceremony	Denim jackets, dress shirts, footwear, sweatshirts, T-shirts	
	Rock N Roll Imports	Beverages	
	White Coffee	Coffee	
	Zippo Manufacturing	Lighters	
FIFA 2014 World Cup—Brazil	Fan Ink	Bandanas, bracelets, hats, headwear, leggings, rainwear, souvenirs, tattoo sleeves	FIFA
Game of Thrones	Dark Horse Comics	Figures	HBO Licensing & Retail
Hello Kitty	Earth Therapeutics	Beauty supplies, cosmetic accessories, neck pillows, sleep masks, slippers, socks	Sanrio
Hershey's	Betty Crocker div. General Mills*	Cake decorations, cakes mixes, cookie mixes	Hershey's
Hive (The)	Medibadge	Sticker activity kits, stickers, temporary tattoos	Joester Loria Group
	Total Resources International	First aid	
Justin Bieber	Brush Buddies	Toothbrushes with sound	Bravado International Group Merchandising Services
PSY	Brush Buddies	Toothbrushes with sound	Bravado International Group Merchandising Services
Psycho Bunny	Apparel Partnership Group	Intimate apparel, loungewear	Psycho Bunny
Rabbids	McFarlane Toys	Action figures, novelty toys, plush	Ubisoft Entertainment

\*Extension or renewal.

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## Licensing News *Continued from page 5*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Thor: The Dark World	Berkshire Fashions	Hats	Disney Consumer Products
	FunKo	Vinyl bobbleheads	
	Hasbro	Toys	
	Mad Engine	T-shirts (men's)	
	New Era Cap	Hats	
	Turtle Beach	Headphones	
USA Curling	Monterey Mills	Blankets	RJM Licensing
WWE	Aquarius	Accessories	WWE
	Good Stuff	Amusement prizes	
	PlayAction	Collectibles, drinkware, housewares	

## International Properties Available or Recently Assigned

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Domo	Pop culture icon and mascot of Japan's NHK broadcasting company.	All (Brazil)	Marcos Rosset, E-all Entertainment
		All (Turkey)	M. Esat Yalvak, Lisans Medya
		All (Middle East)	Hussein Ftouni, Copyright Licensing Agency
		All (Mexico)	Eduardo Shapiro, License Inc.
		All (Scandinavia)	Marie-Louise Bengtsson, Early Bird Licensing
iDoo-B-Doo	Illustrated girl's crafting brand.	Cases, pop-up greeting cards, stickers, story books (Europe)	Jane Evans, JELC Ltd/Blue Trellis
McLaren	Formula 1 car manufacturer.	Eyewear, mobile accessories, sporting equipment, travel gear (U.K.)	David Ball, Performance Brands
Pac-Man and the Ghostly Adventures	Namco Bandai's video game hero, now appearing in his own show. Set to air in fall 2014 in Germany and German-speaking territories.	All (Germany)	Kristin Ehring, Global Licensing and Media
Snowman (The)	Holiday season icon.	Apparel, fashion accessories, food, games, housewares, plush, seasonal & holiday decor (Canada, U.S.)	Joanne Loria, Joester Loria Group
Winx Club	Animated action/fantasy series set in the dimension of Magix where three schools educate modern fairies, witches, and other supernatural warriors.	All (France)	Ignacio Segura de Lassaletta, Planeta Junior SI

## International Licenses Recently Granted

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
1D/One Direction	Leomil NV	Footwear (Europe)	Global Merchandising Services
Battersea Dogs & Cats Home	Rupert's Pet Shop	Dog toys (U.K.)	Battersea Dogs & Cats Home
Betty Boop	Chupa Chups, S.A. Unipersonal	Lollipops (Worldwide)	King Features Syndicate
Bubble Guppies	Magnum Ltd.	Sleepwear (Israel)	Nickelodeon & Viacom Consumer Products (NVCP)
	Mitos Novelties	Accessories, footwear, inflatables, outdoor wear, swimwear (Israel)	
Carli Davidson's SHAKE	teNeues Publishing	Wall calendar (Europe)	Mansion Street Literary Management
Debra Valencia	Landy International	Bathroom decor, body & foot scrubs, cosmetic bags, cosmetics, gift sets, lotions, robes, soaps, towels (Worldwide)	The Brand Liaison
DoodleBops	Santex Moden GmbH*	Apparel (Europe)	Withit Licensing
Dora the Explorer	Mitos Novelties	Accessories, footwear, inflatables, outdoor wear, swimwear (Israel)	Nickelodeon & Viacom Consumer Products (NVCP)
Everything's Rosie	Aykroyd & Sons*	Nightwear (U.K.)	V&S Entertainment
	Blues Clothing*	Outerwear (U.K.)	
	TDP Textiles*	Underwear (children's) (U.K.)	

\*Extension or renewal.

*Continued on page 7*

## Licensing News Continued from page 6

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Forever Friends	Argos	Duvet sets, pillows (U.K.)	Hallmark Cards Plc
Go, Diego, Go!	Mitos Novelties	Accessories, footwear, inflatables, outdoor wear, swimwear (Israel)	Nickelodeon & Viacom Consumer Products (NVCP)
Jelly Belly	Rivermill	Beverages, jellies (U.K.)	Licensing Company, The
Kardashian Kollection	Icon Live	Jewelry (U.K., EMEA)	Jupi Corporation
Little Mix	Mask-arade	Masks, standees (U.K.)	Bravado International Group Merchandising Services
Looney Tunes	Lazy Oaf	Bags, baseball caps, bracelets, hats, jackets, legwear, sweatpants, sweatshirts (U.K.)	Warner Bros. Consumer Products
Looney Tunes Active	NBA Global Merchandising Group	Accessories, apparel, food items, games, toys (EMEA)	Warner Bros. Consumer Products
Mirabelle	Benetton Group	Accessories, gift items, nightwear, stationery, swimwear, underwear (Worldwide)	Santoro Licensing
Moomins	UNIQLO	Apparel (Finland, U.S.)	Bulls Licensing
Moshi Monsters	Carte Blanche Greetings	Gifts & collectibles, plush (Worldwide)	Mind Candy
NHL	Almedahls	Bedding, blankets, drink bottles, towels (Russia, Nordics)	Plus Licens
	LPP S.A.	Activewear, backpacks, bags, boxer shorts & lounge wear, caps, pajamas, scarves, socks, T-shirts (CEE, Russia)	
	Newtop Oy	Bags, caps, coats, folders, glassware, gloves, hats, hooded sweaters, jackets, jumpers, mittens, mugs, nightwear, notebooks, overalls, pants, pencil boxes, pencils, pens, scarves, shorts, sweatshirts, T-shirts, underwear (Russia, Finland, Sweden)	
	Sportmarket Nordic	Gloves, hats, mittens, neckwear, scarves, ski masks, socks, thermal apparel (Nordics, Russia)	
	TShirt Store	Knit headwear, knit scarves, T-shirts (Russia, Germany, U.K., Nordics)	
Peter Rabbit	Emma Bridgewater	Ceramic ware (Europe)	Silvergate Media
	Gund	Plush (Europe)	
Plants vs. Zombies	Character World/TDS Enterprises	Bedding, curtains, rugs (U.K.)	Bulldog Licensing
Shaun the Sheep	Repco Asia	Arts & crafts (Worldwide)	Aardman Animations
Slugterra	Giochi Preziosi	Toys (Italy)	Nerd Corps Entertainment
	Panini Brasil	Stickers, trading cards (Brazil)	
Strange Hill High	Carlton Publishing Group	Books (children's), sticker activity kits (U.K.)	FremantleMedia Enterprises
	Jumbo Games	Games, puzzles (U.K.)	
	Zeon	Clocks, flashlights, iPad & iPhone cases, key chains, money banks, watches (U.K.)	
Team Fortress 2	ThreeA Toys	Figures (Worldwide)	Valve Corporation
Teenage Mutant Ninja Turtles	Stadlbauer Marketing + Vertrieb GmbH	Battery-operated cars, electric racing (Worldwide)	Nickelodeon & Viacom Consumer Products (NVCP)
Thomas & Friends	Darsham Drinks	Beverages (U.K., Ireland)	HIT Entertainment
	DTP Europe Limited	Vitamins (U.K., U.S.)	
Three Stooges	Figures Toy Company	Collectible figures (Worldwide)	C3 Entertainment
Trash Pack (The)	Topps	Collectible cards, gummies (U.K., Eire, Germany, Austria, Switzerland, Nordics)	Lisle International Licensing
Union J	Mask-arade	Masks, standees (U.K.)	SyCo Entertainment
Walking Dead (The)	Spirit Halloween	Costume accessories, costumes (U.S., Canada)	AMC Networks
Wall's Ice Cream	Aspire Brands	Lip balms (U.K.)	Unilever UK
WWE	SG Footwear div. SG Companies	Footwear (U.S., Canada)	WWE
	TV Mania	Apparel, nightwear (U.K.)	

\*Extension or renewal.



# contacts & connections

Contacts & Connections is an alphabetical listing of the licensing companies in this issue.

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## Who's News

**Rick Glankler** is named EVP/GM of FremantleMedia Kids & Family Entertainment. Glankler was previously with Mattel/Fisher Price.

**Chuck Terceira** is promoted to president of Diamond Select Toys & Collectibles. Terceira has been director of DST for the past nine years and, before DST's formation, served as purchasing brand manager for Diamond Comic Distributors' toy team. Terceira will oversee day-to-day operations of DST, as well as Art Asylum, DST's in-house design studio.

**Perry Ellis International**, Callaway Golf's apparel licensee, is extending its existing agreement to cover design, manufacture, and sales of golf apparel across Europe, the Middle East, and Africa, effective Jan. 1, 2014. Callaway currently handles apparel distribution for those territories itself, though South Africa will be a new market for the company later in 2014.

## Shopping in London

Continued from page 1

Licensing in pet toys is a relatively new business in the U.K., unlike in the U.S., say agents based there. But Tesco's Watford Extra store featured an extensive range tied to Dennis and Gnasher, comic strip characters from *The Beano* magazine, which is licensed by D.C. Thompson through agency Start Licensing.

Almost all the publications in Tesco's kids' magazine and partworks section were licensed, based on both British and global properties such as Doc McStuffins, Dora the Explorer, Scooby Doo, Pokémon, Marvel, Dennis and Gnasher, Bob the Builder, and many more. These sorts of property-specific publications, which have a generous number of value-added toys or crafts affixed to the covers, are almost nonexistent in the U.S. market.

### Spotlight on Department Stores

While not much licensing is on display at the high-end Fortnum & Mason store, certain departments at Harrod's feature a high proportion of licensed products.

One of those was the large toy department, which included a Harry Potter corner with some higher-end collectibles, a variety of superhero toys from DC/Warner Bros. and Marvel/Disney, a wall display of Moshi Monsters items, and a significant Hello Kitty shop-in-shop, among other examples.

The substantial territory devoted to Hello Kitty can be explained in part by the fact that the property is the biggest girls' brand in the U.K., with 80 licensees on board and listings in all major U.K. retailers, according to Sanrio's agent in the territory, Fluid World. Retail sales volume for Hello Kitty in the U.K. in 2012 was £274 million on 50 million products sold, which equates to growth of 11% year-on-year. Fashion and fashion accessories account for 45% of sales.

Harrod's book department, adjacent to the toy department, highlighted a lot of licensed plush and book-plus-toy

## EUROPEAN RETAIL TRENDS: DISCOUNTERS, PRIVATE LABELS GROWING, HYPERMARKETS STILL DOMINATE

Planet Retail predicts that discounters will be the fastest-growing retail channel in Europe over the next five years, although hypermarkets will maintain the largest share.

In a presentation at Brand Licensing Europe, the company's Milos Ryba noted that the largest European discounters, Lidl and Aldi, are both adding licensing to their strategic mix. Lidl joined with Warner Bros. Consumer Products, in its first retail exclusive partnership, to carry Man of Steel products in 10,000 stores in 24 countries, while Aldi—traditionally very conservative—has started carrying licensed foods, including Smurfs products.

On the hypermarket side, conversely, retailers are developing their own characters to compete with licensed properties. Auchan is expanding its Rik and Rok characters into new product categories and territories, while Casino has developed a character Crazy-Doo for products and mobile apps. And Carrefour and Disney are parting ways, Ryba says, ending their extensive DTR partnership this year.

Ryba also points out that retailer private labels are expanding, with some going to five tiers (from superdiscount to superpremium), as opposed to three (good, better, and best). This could offer opportunities for licensors, especially on the superpremium end.

In Russia, X5 co-branded its private label products with Fox's Ice Age 3 and 4 on 50 food and nonfood products, seeing sales growth of 5% in the first half of 2013 compared to the same period in 2012, even as sales for the chain overall declined.

packages, with the nonbook product merchandised on a shelf alongside the books. Properties included book-based characters such as Eric Carle, *The Gruffalo*, and *Moomin*, as well as nonbook properties such as *Angry Birds*.

Down in Harrod's ground-floor food department were some unusual licensed novelties, such as Armani bottled water, exclusive to the retailer, and Mr. Tikki's Lurch Sauce, based on the character from *The Addams Family*. The latter was in a Halloween display; most of the retailers visited had extensive Halloween merchandise on display in mid-October, marking a holiday that has blossomed in the U.K. over the last few years.


### Chefs and Celebrities

The U.K. market is as celebrity-crazy as the U.S., and some celebrity-licensed products stand out at retail. A number of chef-licensed items are on display, for example, including a range of Jamie Oliver cookware at Tesco Extra and a section of Little Venice Cake Co. gadgets at Divertimenti, a specialty kitchenware shop.

While the drugstore chain Boots is often cited as a distribution channel for licensed goods, we did not see many examples in the stores we visited. But we did see three hangers with three SKUs of Katy Perry false eyelashes.

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## U.K. Museums

*Continued from page 3*

(tied to a current exhibition of Elizabethan jewelry known as the Cheapside Hoard) featured on QVC, to name just a few examples.

The Museum of London is in discussions about expanding the QVC program, now in the U.K. only, to the U.S. branch of the multichannel retailer and is also in talks with another licensee about a potential line of jewelry distributed through the John Lewis department store chain, according to Harriet Berry of the Museum.

### New Entrants

U.K. museums that have launched licensing efforts within the last year or so range from the National Museums Northern Ireland to the British Library. The NMNI debuted their collection for licensing at BLE last month, although they have been involved in picture licensing for editorial purposes for some time. “There are museums that make hundreds of thousands of pounds per year from licensing,” says Patrick McLain of NMNI. “We’d like to put a toe in the water.” The collection includes artifacts from the Titanic, as well as Irish art, history, and handicrafts.

Meanwhile, the British Library has been officially involved in product licensing for about a year, according to the museum’s Martin Oestreicher. During that time, it has signed over a dozen licensees, ranging from traditional categories such as calendars, greeting cards, diaries, and jigsaws, to contemporary items such as e-book readers that look like old print book covers (from Big Strawberry). A number of other categories are in development.

### Growth for the Old Guard

V&A Enterprises, the commercial arm of the Victoria & Albert Museum, for example, has licensees in categories including home décor, gardening tools, apparel, and toys. Most feature contemporary patterns inspired by the museum’s extensive collection of graphics, which cross a variety

of time periods and design trends.

Several of the longest-established licensing initiatives have been experiencing growth of late, adding new categories and launching new themes or sub-brands. The Natural History Museum has more than 20 licensees on board for kids’ products—including the top two sellers, the dinosaur pincher and the pocket microscope—with several more categories to be introduced in 2014, according to Zuzi Wojciechowska.

It also has a design-based program for adults, along with a new initiative based on its Wildlife Photographer of the Year contest, which takes place annually, with the winners’ and the other entrants’ photos included in an exhibition each year. These photos are now available for licensing, with the first licensee being Quadrille (also a licensee of design brands Cath Kidston and Liberty) for stationery.

Quadrille is one of several Natural History Museum licensees that maintain global distribution rights, with sales particularly strong in Australia and North America, where the traveling Wildlife Photographer exhibition is popular.

### Events and Authenticity

Another growing program is that tied to the Imperial War Museums, which encompass five locations across the U.K. In addition to the bespoke fragrance line with Marks & Spencer mentioned earlier, IWM have licensees with multi-retailer distribution, in categories ranging from high-end clothing to posters.

The 100th anniversary of the outbreak of World War I, which takes place in 2014, is driving some of the growth in the program, according to the organization’s Elizabeth Bowers, who notes the museum will have a special logo for the event. “The [Queen’s Diamond] Jubilee and the Olympics were really big here, so retailers are looking for the next big national coming-together,” she says.

Museum licensing programs often tout their authenticity and expertise as part of the advantage for licensees that

*Continued on page 12*

## Benchmark Royalty Rates, Guarantees and Advances



### DO YOU KNOW?

- ▶ The average royalty across all property types and product categories?
- ▶ Which three property types earn the highest royalties?
- ▶ Which three product categories pay the highest royalties?
- ▶ The range of guarantees for licensing agreements?
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## Sequential Acquires Franklin Mint for ‘Legitimacy Over Many Categories’

The acquisition of Franklin Mint by Sequential Brands Group will see Sequential continuing FM’s coin programs and focusing on collectibles and gift items. “The Boomer world [and other demographics] know the Franklin Mint brand,” Sequential’s Yehuda Shmidman tells *TLL*, “but distribution hasn’t kept pace. Franklin Mint’s traditional direct response business model can evolve into modern distribution including broadband and retail.”

Franklin Mint, which was founded in 1964, specialized (and helped define) classic direct response continuity series for coins, plates, figurines, and other items. The company also sold one-offs such as the Jackie O faux pearls (created under license from the estate and issued with a “certificate of authenticity”), a Frank Sinatra “singing plate” (full disclosure: your editor bought one of those with the “Chairman of the Board” singing “My Way”), and a superdeluxe Monopoly set.

“I look at that Monopoly set, which I think sold for \$600 with gold hotels and silver houses—when you could buy Monopoly at any toy store for less than \$20—and I see an open market,” says Shmidman. “For collectibles, we’re looking at games, die-cast, any item—you fill in the blank. And gift-giving ties into collectibles, though it’s different.”

Historically, Franklin Mint licensed in, and Sequential anticipates continuing to do so. However, much of the focus will be on licensing out the Franklin Mint name and motto, “Mint the moment.” Shmidman ultimately sees shop-in-shops at retail with “all solutions for gift-giving for children, parents, grandparents, friends.” Sequential is exploring both DTR and wide retail opportunities.

“Since the announcement, I’m hearing stories from all these people I know about what they bought from Franklin Mint,” says Shmidman, who was with Iconix prior to joining publicly traded Sequential. “In the licensing business, few properties apply across the board. When I was at Iconix I had the privilege of working on Snoopy, which does. Hello Kitty—that’s a huge success in just about every category. Obviously Franklin Mint isn’t a character, but what it shares in common with those properties is its legitimacy over many categories.”

At its peak, Franklin Mint is reported to have approached \$1 billion annually in sales.

## U.K. Museums

*Continued from page 11*

choose to work with them. For example, the Natural History Museum has 300 scientists on its staff, and they work with licensees to ensure that children’s educational products are true to the science.

Each IWM-licensed item has a hangtag or insert that explains how the inspiration for a given item has historical meaning, often focusing on the human connection. For instance, products tied to a recruitment poster explain how the poster was used, how many men were recruited as a result of the image, and perhaps a story reflecting an individual soldier’s service and experience.

“The historical context and the story behind the item is the added value that we have,” explains Bowers. “It gives the products a point of difference.”

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# International Licensing: A Status Report, 7th Edition

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Germany	Turkey	Australia
Austria	Poland	New Zealand
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# Move Your Sports Licensing Program Into The Winner's Circle

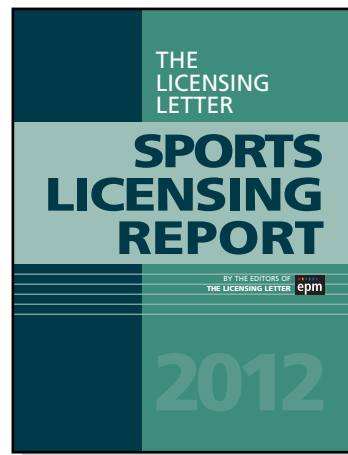
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- ▶ The three fastest growing product categories for sports properties are gifts and novelties, apparel, and consumer electronics, up more than 6% each in 2011.
- ▶ While small, Major League Soccer demonstrated the highest rate of growth for all sports leagues and organizations in 2011, with retail sales of licensed goods up 25%.
- ▶ At \$3.3 billion, licensing of collegiate merchandise is greater than that of Major League Baseball.

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