

# TLL THE LICENSING LETTER

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## 'Do-It-Yourself' Permeates Categories at Toy Fair; Entertainment Consolidates Under Key Toy Makers

"Do it yourself" (DIY), in its broadest sense, was one of the overriding themes of this year's New York International Toy Fair. The trend encompassed everything from building sets to customization.

The prominence of construction sets continues to grow each year, of course, led by LEGO (with new licenses including The Simpsons) and extending to Mega Bloks (SpongeBob), K'Nex (Titanfall), Ionix (How to Train Your Dragon 2), and Laser Pegs (National Geographic), among many others.

Meanwhile, the concept of building and customization was prominent in other toys as well. With its Hot Wheels brand, Mattel was touting the fun not just of racing but of building unique track sets with its Hot Wheels Track Builder System.

Hasbro offered customizable My Little Pony figures, which girls can personalize with accessories and interchangeable parts. Its Marvel Superhero Mashers allow kids to create unique figures by combining attributes and superpowers of different heroes into one.

The DIY theme also carried over into the concept of crowdsourcing. A new company, Sugar Lulu, is marketing accessories, jewelry, and other items that are created by a community of tweens who send in ideas, vote on concepts, create videos, and audition for commercials.

"It's about me guiding the kids to come up with something saleable," says Sugar Lulu co-founder Shari Kaufman. "It's a line that allows girls to express their style and explore their creativity. It doesn't look like anything else out there." Social media, particularly YouTube and Instagram, will be key to the effort, and some categories, such as bedding, are likely to be achieved through licensing.

The continued growth of the craft and activity kit segment also played into the DIY trend. A number of publishers, toy companies, and craft and activity specialists added SKUs to

their craft lines, including several licensed items.

Wooky Entertainment, for instance, added Nissan and Ford to its roster of licenses for sketchpads targeted toward boys, as well as combining Disney Princess and its Style Me Up fashion design brand.

### Tech Trends

The umbrella of technology also covered a number of diverse trends, from an increase in kid-friendly electronics and accessories (including licensed versions) to a plethora of robots.

The rising focus on science, technology, engineering, and math (STEM) in school curricula helped drive science-related toys to the forefront. Science kits are always a big category at Toy Fair, mostly from specialists such as Milton and Eyewitness. This year more generalist

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### NO iPADS NEED APPLY

## Toy Makers Add Value Via App-Connected Toys

Smarter and sleeker uses of mobile and tablet applications were introduced at the 2014 Toy Fair in New York City.

The toys of the past few years that required an iPad (made by licensees including the now-defunct Discovery Bay Games) were virtually nowhere to be found. Instead, most toys on display used connected features as added bonuses without requiring connectivity for basic play.

### Augmented Reality

The biggest change in connected toys is the wider availability of those incorporating augmented reality (or AR).

Smartphone apps and portable game

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# ➡ Licensing Ledger



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## OH, THAT FLAPPY BIRD

Will game designer **Dong Nguyen**'s decision to pull his super hit "Flappy Bird" app game down enhance its value or kill the opportunity for licensing?

"There's a quick t-shirt opportunity today," says one reader of our *TLL Daily Advisor*, "but I don't know about tomorrow."

Others were still interested and tell us they had heard back from a company representing Flappy Bird.

(While the game was still online, there was a link for emailing designer Dong Nguyen; the responses requesting proposals were to emails sent to Dong that way.)

A **Nintendo** lawsuit was rumored, based on similarity to some of the art in Mario Bros. games, but Nintendo has denied that. Others say the designer was asked to change some art and did. Overall, our licensing contacts are optimistic.

## DREAMWORKS PRESS

**DreamWorks Animation** is launching DreamWorks Press, an in-house operation to publish digital and print books based on the studio's IP; the line will be sold and distributed by **Perseus's Publisher Group West** distribution unit. Existing licenses with other publishers continue in force, and newly appointed DreamWorks Press head Emma Whittard, an 18-year veteran of children's publishing, including eight years with Disney, tells us, "We do not want to stop licensing in North America. We have fantastic relationships it makes sense to continue. What we do should be incremental and complementary." Preliminary plans call for 15 to 18 titles per year "once we're up to speed."

## FORGOTTEN BRANDS (NOT)

**Pan Am** may not be an active airline or television show anymore, but it's still big in Japan, according to *Bloomberg*. But Pan Am isn't alone. **Woolworth's** (unrelated to the U.S. original), **Mister Donut**, and **Brusha, Brusha** no longer hold any staying power in the U.S. but have continued success overseas, finding new

investors, outlets, and product partners internationally.

## SHORTAGES IN SOCHI

Retailers and pop-up shops for Olympic merchandise in Sochi were few and far between, according to *The Wall Street Journal*. A line to get into the lone Olympics superstore in the main Olympic Park required a wait of an hour or two, but other shops were scarce. The Olympic organizing committee estimates licensing revenue of \$30 million for the current games, compared to the \$50 million generated during the 2010 Vancouver games and \$130 million from the 2012 event in London.

## A LEGO SNAPSHOT

There are approximately 375 Star Wars **LEGO** sets, just over 50 for Harry Potter, and about 15 each for Batman, Lord of the Rings, Indiana Jones, and Pirates of the Caribbean, among others, reports *Wired*.

## 'TOP CHEF' SETS SAIL

**Bravo's "Top Chef"** has licensed **Celebrity Cruises** to feature its Quickfire Challenges and show-inspired menu items on 10 ships for a year beginning July 2014.

Also part of the deal: four theme cruises featuring past contestants and cooking demonstrations. Private cooking classes and events hosted by former chef contestants will be add-ons to the cruises.

## C3PO READY TO WEAR

**Disney's Lucasfilm** has licensed Star Wars to **Rodarte** for women's wear. The brand's Fashion Week fall 2014 collection includes Star Wars-branded gowns, skirts, and dresses featuring full-color pictures of C3PO, Luke Skywalker, and other Star Wars characters/locations.

## LICENSING BY THE NUMBERS

**Hasbro** net revenues for its entertainment and licensing segment increased 5% 2012-2013, while operating profit declined 15% for the year. "The segment benefitted from growth in digital gaming, including the addition of Backflip Studios, as well as growth in lifestyle licensing," according to the company. "These gains were partially offset by lower entertainment revenues in 2013. The Entertainment and Licensing segment reported \$45.5 million in operating profit compared to \$53.2 million in 2012."

**Disney Consumer Products** revenues increased 11% to \$1.1 billion and segment operating income increased 24% to \$430 million in the company's first fiscal quarter, including both merchandise licensing and Disney's retail business. The increase in operating income at merchandise licensing was due to the inclusion of **Lucasfilm** and higher revenues from the performance of *Planes*, Disney Junior, and *Monsters University* goods, partially offset by lower revenue from sales of Cars and Spider-Man items.

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## Toy Fair

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toy and craft companies added science SKUs or displayed their science-themed items more prominently.

Perhaps surprisingly, not many companies used the STEM buzzword to market their products, although there were a few examples, such as the Numbers Alive! STEM Squad, intended to encourage numerical literacy. GoldieBlox, which specializes in kits that teach engineering concepts to girls, uses the slogan “toys for future innovators.”

Augmented reality remains ubiquitous in its third year as a leading Toy Fair trend. A significant percentage of toys from vendors large and small include apps that “bring the toys alive” on a tablet or smartphone screen. AR technology is expanding to new product categories in 2014, with Popar and AM Productions both exhibiting augmented reality books, for example, a product that had not been on the AR bandwagon at previous Toy Fairs.

A new trend in apps emerged this year, with a number of companies offering app-controlled cars, planes, and helicopters to replace traditional radio-controlled technology. Examples ranged from the PowerUp 3.0 smartphone-controlled paper airplane to Qualcomm Vuforia’s app-driven Hot Wheels Power Port.

The app-as-licensed-property trend seems to be petering out, with very little presence for mobile-origin licenses, a stark contrast to the last two years. A few examples were scattered around the show floor, but none seems ready to replace Angry Birds, which licensees and observers

### NEW PRODUCTS, NEW OPPORTUNITIES

Some emerging or growth categories and products seen at Toy Fair would seem to have licensing potential, although they have little or no licensing activity to date.

A high-profile product this year was the Rainbow Loom, which allows girls—and boys—to make bracelets and rings from rubber bands. A number of craft looms from other companies were also placed front and center in their respective booths, with brands including Loop de Doo and Loop de Loom, Potholder Pro, Threadz, Lots of Knots, and Bead Bazaar’s Beading Loom Kit, among others.

Rainbow Loom recently retained Brand Central as its outbound licensing agent, but it seems that looms such as this also would be appropriate for inbound licensing tied to brands related to colors or crafts. On the other hand, the craze is likely to be short-lived.

We were surprised by the logo for Loomy Time, “the original watch for Rainbow Loom bracelets,” which mimics the one for Looney Tunes. It wasn’t clear whether this was a licensee of Rainbow Loom.

Another growing area this year was sand toys, particularly items that make indentations or sculptures from sand (e.g., Beach Stamps) and sand-like substances that hold their shape. One product, My Little Sandbox, had a number of new licenses, including Disney Junior and Dora, but most exhibitors’ sand items are only available in nonlicensed versions to date.

A company called Clawz offered Crocs-like, paw-shaped shoes that would seem to have potential for properties associated with animals, monsters, or other creatures with distinctive feet.

report is past its peak in many (but not all) categories. Meanwhile, licensor Rovio introduced “Angry Birds Stella,” a girl-skewing spin-off.

Viral videos seem to be driving more licensing, however, with YouTube-friendly pets including Li'l Bub, Grumpy Cat, and Boo all available as plush from Cuddle Barn, Gund and Ganz, and Gund, respectively. Grumpy Cat also was spotted on other products, including car window stickers and T-shirts.

For more on related tech trends at Toy Fair, see the accompanying story (on page 1).

### Role of Licensing

Many of the big movie and TV properties were largely concentrated at the major toy companies rather than being spread across the show floor as in years gone by. Examples include the Godzilla movie at JAKKS, Teenage Mutant Ninja Turtles at Playmates, and the various Marvel movies and TV series at Hasbro.

No properties were clearly dominant, although several seemed to have a greater presence this year than in the past. Interestingly, many of the licenses that were notable in 2014 came from nonentertainment sectors. Examples include Minecraft, Duck Commander, the Smithsonian Institute, and FIFA World Cup Brazil. Star Wars and Disney Jr. also were common sights.

Co-branding is still alive and well in the toy industry. Plushland showed Sock Monkey and Hello Kitty wearing collegiate T-shirts, Major League Baseball and Angry Birds were spotted on plush, License2Play showed Domo x DC plush, and Mattel had a Power Wheels ride-on featuring both Teenage Mutant Ninja Turtles and Kawasaki branding.

More than the usual number of booths seemed to be devoted to single licensed properties this year. The licensors of B. Duck, Tokidoki, and Doraemon were among those showing a variety of licensed items, while several licensees devoted their space to a single property as well. Examples of the latter include Dream (licensee of Rilakkuma), J. Marcus (Rudolph the Red-Nosed Reindeer), MMA (Hello Kitty GO! sporting goods), Little Buddy (Super Mario and other Nintendo characters), and Reutter Porcelain (Beatrix Potter tea sets). Almost all of these properties have their origins overseas.

### Other Observations

Additional themes noted at Toy Fair in 2014:

- ▶ *Girl power.* From GoldieBlox to Go! Go! Sports Girls to Angry Birds Stella, several companies showed empowering, not-too-girly products for females.
- ▶ *Americana.* Licenses such as Duck Commander, the military services, and Realtree camo were noted in categories from marshmallow guns to ride-ons.
- ▶ *Baking.* Cupcakes, donuts, and other baked foods were themes not only for the usual cooking sets, but also for games, puzzles, and craft kits.
- ▶ *Foods.* More than the usual number of licensees, especially in the board and card games category,

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## Toy Fair

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had products focusing on foods such as sandwiches, bacon, baloney, and sushi. A few were licensed. TDC Games, for example, had Tootsie Roll and Campbell's Soup dice games packaged in giant containers and soup cans, respectively; these were displayed alongside Baloney and Bacon dice games where the packaging resembled but did not incorporate the logo of Oscar Mayer.

- ▶ *Social media.* Brand marketers are embracing social media for marketing, product development, and

especially fostering community and conversation. Mattel launched a social initiative encouraging conversation about whether Barbie is an empowering female role model or the opposite, essentially embracing the controversy that has long followed the doll.

- ▶ *Kickstarter.* Games that were touting the fact that they were developed with crowdfunding support included Thinkfun's Robot Turtles: The Game for Little Programmers and the PowerUp 3.0 app-powered paper airplane mentioned earlier.
- ▶ *Vampires and zombies.* They haven't disappeared yet, with AMC's "Walking Dead" especially prominent.

## App-Connected Toys

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devices such as the Nintendo 3DS have used AR-capable apps and games for a few years now, taking a scene captured from a live camera and adding objects and/or characters in real time to scenes viewed/played on the devices, essentially placing the player in the scene.

Bandai's addition to this year's Power Rangers line comes in the form of 60 plastic figures based on Rangers from past and present TV seasons, each of which conceals a key.

The plastic key fits into a device that plays sound bites from the corresponding ranger. The figures come with Power Rangers Super Megaforce-branded toys and playsets or are sold in packs of three for under \$10.

The keys also reveal an AR code to be used in a dedicated Power Rangers app for mobile phones; scanning the code morphs the user on the screen into the corresponding Ranger to fight enemies in the app.

Bandai will also release the Tamagotchi Friends line in the U.S. this fall (and now in Europe), which adds new features to the classic electronic pet Tamagotchi concept. The Friends line additionally communicates with other Tamagotchi devices held by friends. The toys further communicate with the Tamagotchi Friends website, which features games, webisodes, and links to new Tamagotchi apps.

Crayola is releasing two coloring kits, bundling the usual Crayola tools with an AR-equipped coloring book. A race car-focused set will work with a future mobile app, letting boys lift the car off the pages of the book, add on to it, and race other cars in a physics-equipped racing game.

Similarly, a fashion-oriented coloring set will take dress and outfit designs into a virtual fashion show app, affording young girls the ability to show off their creations on custom models in globe-spanning backgrounds.

### Connectivity Packed In

Some manufacturers continue the tradition of adding

redeemable codes or including other inserts with their physical products to highlight their digital offerings.

For example, electronics manufacturer Sakar introduced Camelio, a family-friendly Android tablet last year, with optional add-on accessory packs. Instead of simply adding a branded protective shell to the tablet, the accessory packs also include branded icons, wallpaper, and other brand-related content to the tablet.

In addition to WWE and Hello Kitty packs, Sakar recently added Teenage Mutant Ninja Turtles and Batman to its roster of properties.

Quantum MechaniX (or QMX) makes collectibles and computer/mobile applications. The company is currently in the development stage for a massively multiplayer online game based on Joss Whedon's "Firefly" television series.

QMX also acts as collectibles licensee for "Firefly" and plans to include tokens for in-game items packed in with future products.

### The Skylanders Approach

Though Activision's nonmoving Skylanders toys work on their own as figures, their intended use is with the "Skylanders" console games. Activision recently announced sales of over 175 million Skylanders toys since the first game's release in October 2011.

The toys, which unlock in-game characters, abilities, and content, will see a new staggered release throughout the rest of 2014, gradually introducing new characters/toys to retailers in support of "Skylanders: Swap Force." Activision says 20% of the characters available for the game have yet to be released.

Hasbro continues its relationship with Rovio for a similar endeavor. After releasing "Angry Birds Go!" figures that translate to in-game content for the mobile game of the same name, the toy company will take on "Angry Birds Stella," Rovio's new female-focused Angry Birds line. "Stella" toys will go on sale about the same time as the app and will utilize special codes to unlock unspecified in-game content.



# Licensing News

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

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Hickory Farms	Company known for food gift baskets containing cheese, meats, fruits, and other goods.	Beverage, cooking, food	Cindy Birdsong, Brand Licensing Team
Jason Santos	Chef known for his appearance on Hell's Kitchen and other cooking-related programs	Cookware	Ani Khachioian, C3 Entertainment
Pedro Infante	Late movie star known for numerous films and hundreds of songs.	All	Rick Alessandri, Univision Enterprises
Rainbow Loom	Bracelet-making toy/craft kit using different color rubber bands.	Accessories, apparel, back-to-school, crafts, games, home products, party supplies, toys	Ross Misher, Brand Central
Rockettes	Dance company known for appearances at Radio City Music Hall and during the Thanksgiving Day Parade.	Beauty, fashion, fitness	Hilla Narov, Full Picture
Roshambo	Gamemasters' comic property launched via Kickstarter campaign in 2013.	All except comics	Michael Dismuke, Gamemasters

## Licenses Recently Granted, U.S.

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Adventure Time	A Crowded Coop	Pet accessories	Cartoon Network Enterprises
Assassin's Creed	Cryptozoic Entertainment	Board games	Ubisoft Entertainment
Avanti	Acco Brands	Accessories, binders, composition books, folders, notebooks	Lisa Marks Associates (LMA)
	Brown Trout Publishers	Calendars, datebooks, engagement books, journals	
	Mad Engine	Fashion tops, fleece, knit tops, onesies, T-shirts, tank tops	
	Modern Gourmet Foods	Boxed chocolate/confections, food/drink gift boxes	
	Robert Kaufman Fabrics	Fabric	
Baskin-Robbins	Boardwalk Frozen Treats	Ice cream products	Dunkin' Brands
Betty Boop	Bradford Exchange	Co-branded collectibles	King Features Syndicate
	Kintetix	Specialty apparel	
Call of Duty	MEGA Brands America	Construction toys	Activision
Cartoon Hangover's Bravest Warriors	A Crowded Coop	Backpack	Frederator Studios
Coca-Cola	Lionel Trains*	Train sets	Coca-Cola Company
Crayola	Lionel Trains	Train sets	Crayola
Crumbs Bake Shop	Pelican Bay	Food mixes/kits	Crumbs Bake Shop

\*Extension or renewal.

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## Licensing News *Continued from page 5*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
DC Comics Super Heroes	Quantum Mechanix/QMx	Collectibles	Warner Bros. Consumer Products
Disney	DecalGirl	Electronic accessories	Disney Consumer Products
Downton Abbey	Inter-Governmental Philatelic Corporation (IGPC)	Art frames, postage stamps, stamp albums	Knockout Licensing
Elvis Presley	A Crowded Coop	Pet accessories	Authentic Brands Group
Family Guy	K'NEX Brands	Construction toys	20th Century Fox Consumer Products
Frosty the Snowman	Lionel Trains*	Train sets	Warner Bros. Consumer Products
Godzilla	JAKKS Pacific	Toys	Warner Bros. Consumer Products
	National Entertainment Collectibles Association (NECA)	Collectibles, novelties	
	Sideshow Collectibles	Statues	
Guardians of the Galaxy	Hasbro*	Action figures	Disney Consumer Products
	LEGO Systems*	Construction blocks	
Halo 4	A Crowded Coop	Lunchboxes	343 Industries Microsoft
Hollywood Game Night	Cardinal Industries	Card games	NBC Universal Television Distribution
Just Born brands	Mattel	Die-cast vehicles	Lisa Marks Associates (LMA)
	Ripple Junction	Sweatshirts, T-shirts, tank tops	
Justin Time	CafePress	Custom products	Knockout Licensing
Kathy Ireland	E-Filliate	Mobile accessories	Kathy Ireland Worldwide
Legends of Oz—Dorothy's Return	Madame Alexander Doll Company	Dolls	Evolution
Maleficent	JAKKS Pacific*	Dolls, role play	Disney Consumer Products
Muppets Most Wanted	Del Toro*	Footwear	Disney Consumer Products
	Madame Alexander Doll Company	Puppets	
	Mighty Fine*	Apparel	
NFL	Bradford Exchange	Co-branded collectibles	NFL Properties
Peace Frogs	Trau & Loevner	Apparel	Brentwood Licensing
Peanuts	Lionel Trains*	Train sets	Iconix Brand Group
	Schleich North America	Accessories, figurines, playsets, vehicles	
Peeps	Fetch ... For Cool Pets!	Pet accessories, pet beds, pet clothing, pet toys	Lisa Marks Associates (LMA)
	Little Kids	Bubble toys	
	Wilton Industries	Baking & cooking supplies, edible decorations	

\*Extension or renewal.

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## Licensing News *Continued from page 6*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Simpsons (The)	Cardinal Industries	Trivia games	20th Century Fox Consumer Products
	Commonwealth Toy & Novelty*	Plush	
	Mattel	Die-cast vehicles	
	National Entertainment Collectibles Association (NECA)	Apparel, collectibles, figures, novelty	
	PPW Toys	Co-branded toys	
SpongeBob SquarePants	Paper Punk dba Lo Res Labs	Craft kits	Nickelodeon
Stan Lee's Mighty 7	Fame Jeans	Flip flops, headwear	Genius Brands
	Greensource	Apparel	
Star Wars	Her Universe*	Necklaces	Lucas Licensing
	Quantum Mechanics/QMx	Collectibles	
Subway Surfers	Cookie Company (The)	Apparel (Benelux)	License Connection
Teenage Mutant Ninja Turtles	Paper Punk dba Lo Res Labs	Craft kits	Nickelodeon
World of Eric Carle (The)	PS Brands/Planet Sox	Footwear, hosiery	Joester Loria Group
WWE	Brush Buddies	Toothbrushes with sound	WWE

## International Properties Available or Recently Assigned

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
DreamWorks Animation	Includes DreamWorks Animation properties except for How to Train Your Dragon, which existing agents will manage until sometime next year.	All (Central Europe, Eastern Europe)	Ignacio Segura de Lassaletta, Planeta Junior SI
Ladybird Books	Book brand set to celebrate its 100th anniversary next year.	Arts & crafts, beverages, food, games, gifting, housewares, puzzles (U.K.)	Susan Bolsover, Penguin U.K.
Nativity	Film franchise with third title, Nativity 3: Dude, Where's My Donkey, set for a November 2014 release in the U.K.	Accessories, apparel, gifts (U.K.)	Hannah Mungo, Entertainment One
Pocoyo	Animated cartoon series about a curious boy in blue; geared toward preschool children.	All (U.K., Ireland)	Armelle Madelin, Square Licensing
Speedway GB	Go Speed International's motorsports leagues.	All (Worldwide)	Alan Shorrocks, 360 Licensing
St Andrews Links	One of the oldest golf courses in the world, located in St Andrews, Scotland.	Ceramics, fragrance, glassware, jewelry, luggage (Worldwide)	Vickie O'Malley, Copyright Promotions Licensing Group
Tickety Toc	Zodiak Kids' preschool CGI animated program featuring the comedic adventures and exploits of twins Tommy and Tallulah.	All (Middle East, North Africa)	Alia Atcha Almeida, MBC Licensing & Merchandising
Winx Club	Animated action/fantasy series set in the dimension of Magix where three schools educate modern fairies, witches, and other supernatural warriors.	All (Greece)	Clemente Pinedo, BRIGHTS

\*Extension or renewal.

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## Licensing News *Continued from page 7*

### International Licenses Recently Granted

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Angry Birds Go!	Giromax International*	Clay figures (Spain)	Rovio Entertainment
Bagpuss	Hype Associates	Greeting cards (U.K.)	Coolabi
	Intellex	Plush (U.K.)	
	PMS International	Plush (U.K.)	
Bamforth	Evans Lichfield	Cushions (U.K.)	JELC Ltd./Blue Trellis
Beano (The)	Gibsons	Puzzles (U.K.)	DC Thomson
	Hype Associates*	Greeting cards (U.K.)	
	Wild & Wolf	Stationery (U.K.)	
Dinosaur Train	Character World/TDS Enterprises	Home decor (U.K.)	Nickelodeon & Viacom Consumer Products UK
Happy Sports	TV Mania*	Apparel (U.K.)	Smileyworld
HGTV Home	Dreams LLC	Bed accessories, mattress foundations, mattresses (U.S., Canada)	Beanstalk
Johnny Test	Imports Dragon	Toys (North America)	DHX Media
Ladybird Books	Portico Designs	Calendars, postcards, stationery (U.K.)	Penguin U.K.
Ladybug	Bandai America	Master toy (Worldwide)	Zag
Life	Poetic Gem*	Apparel (U.K.)	Bulldog Licensing
Paddington Bear	Upper Canada Soap	Health & beauty aids (U.S., Canada)	JAM Brands
	Allison's Fine Foods	Candy, confectionery (Canada)	
	Camelot Fabrics/Eugene Textiles	Craft kits, fabric (U.S., Canada, Australia, New Zealand)	
	Oh! Naturals Flavoured Snacks	Snacks (U.S., Canada, Australia, New Zealand)	
	Stuffed Animal House	Co-branded plush (U.S., Canada)	
Peppa Pig	Jazwares	Master toy (North America)	Entertainment One
Playboy	Special Product Design*	Apparel, figurines, hats, mobile accessories, mugs, tote bags (Japan)	Playboy Enterprises
Stan Lee's Mighty 7	Factory Entertainment	Toys (Worldwide)	Genius Brands
	Fame Jeans	Apparel (Canada)	
	J Corp.	Apparel (Canada)	
	Zak Designs	Mealtime products (U.S., Canada)	
Suzy's Zoo	Iron Gut Publishing	Artwork (U.K.)	Metrostar
Warner Bros. properties	Puma	Co-branded accessories, co-branded apparel, co-branded footwear (Worldwide—Superman excluded from U.S., Canada; Tom & Jerry excluded from Chile.)	Warner Bros. Consumer Products

\*Extension or renewal.





# contacts & connections

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

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Continued on page 10

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## When Licensing ‘Makes It Worse’; Decrying Decline in Play Value

Toy Fair wasn't the only game in town (New York City) last month for talk of children and play. The Kidscreen conference and show at the New York Hilton hosted some 1,700 participants—some less than positively disposed to licensing.

“Licensing as a business model makes [the decline in the action adventure sector of the toy business] worse,” said Wayne Losey, of Dynamo Development Labs, at a Kidscreen session titled “Translating TV to Toys.”

“Say you're buying the license to market a small Iron Man. You're spending on paint, elbow joints, whatever to make it look like the one on the screen and to satisfy the needs of the property.”

“You're *not* spending on play value. You're gutting the kid's fantasy so all you have is a replica.”

Consultant Nancy Zwiers of Funosophy added, “The toy industry is struggling because play value has declined.”

“If you define play value as time spent playing with the toy vs. cost, how can you compete with a free or 99-cent app?”

And responding to an audience comment about purpose-built construction toys (“They're taking creativity out of Lego. Every set comes with instructions to build something specific.”), Losey noted, “That's the friction between what sells and what's best for the child. I've read that 85% of kids that put together a kit will leave it put together. And I bet the Lego people are as disturbed by this trend as you [the audience member] are.”

To counter the negative trends, Zwiers urges licensors and toy manufacturers to “build a collectible world of product and make sure the ‘fiddle factor’ is high. Manipulative play—where you manipulate the toy—digital can't deliver that.”

## Toy Makers Live Not by Toys Alone

With the recent critical and box office success of the LEGO movie—and since it's Toy Fair week—it seems like a good time to note the continuing trend of toy companies evolving into entertainment companies.

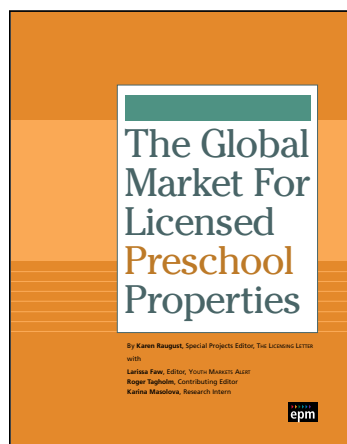
Hasbro and Mattel have been positioning themselves this way for several years, Hasbro with franchises such as Transformers and My Little Pony and Mattel with its Barbie DVD movie program and more recently the online content- and publishing-driven Monster High.

Other examples:

- ▶ JAKKS and its Monsuno franchise, created in partnership with Japanese TV production company Dentsu.
- ▶ LEGO and its new Mixels multiplatform property, created in conjunction with Cartoon Network. LEGO also has launched entertainment ventures based on its various in-house franchises, including Legends of Chima.
- ▶ Spin Master and Redakai, developed with Marathon Media and Zodiak Kids; Tenkai Knights, with ShoPro; and the wholly owned Paw Patrol, created with Nickelodeon. Spin Master also is a co-producer of the Bakugan franchise.
- ▶ Playmobil and its video game series starring Playmobil figures and play worlds, created in partnership with Gameloft.
- ▶ MGA Entertainment and its “Lalaloopsy” TV series with Nickelodeon.

Licensors—including toy companies—face extreme competition for both broadcast airtime and retail shelf space. They also find it difficult to break through with new properties, whether online, offline, or at retail. Therefore, they need as many “touchpoints” as possible to build and maintain brand awareness, keep a property fresh, and allow kids to find the brand in the first place.

## Can you compete in the \$10.4 billion global preschool market?



### DO YOU KNOW:

- ▶ Which 11 preschool properties had retail sales of licensed merchandise of \$100 million or more each in 2012?
- ▶ What percent of preschool merchandise sold is toys, apparel, and other categories?
- ▶ The five properties licensing executives predict will be “hot” in 2013?
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## Add-Ons to Existing Deals Help Licensors Target Tertiary Markets

As licensors look for new opportunities wherever they can find them, they are increasingly signing licensees that can distribute in countries not typically considered major territories.

Some recent instances include:

- ▶ Outfit 7 licensing Russian toy company Simbat for a line of Talking Tom plush, backpacks, and other items, for not only Russia, but also the rest of the Commonwealth of Independent States, which includes 11 countries from the Ukraine to Uzbekistan.
- ▶ Indian licensor and agent Aardarsh representing Fido Dido in India as well as the other seven South Asian Association for Regional Cooperation (SAARC) countries, which include Bangladesh, Pakistan, and Bhutan.
- ▶ Nerd Corps signing a Slugterra licensee, Importadora y Exportadora Rosen, for sporting goods in Central American countries including Nicaragua, El Salvador, Honduras, Belize, the Dominican Republic, and the Caribbean islands, as well as other, larger Central and South American countries.

Most of these territories are fraught with challenges—political, economic, geographic, and other—and nowhere near having significant licensing potential. But they are increasingly considered worthwhile add-ons to existing deals with licensees that can reach both major territories and these supplemental regions.

### JUDITH ALBERT JOINS TLL

Judith Albert joins THE LICENSING LETTER as executive editor, licensing reports.

Albert brings a strong background in market intelligence to THE LICENSING LETTER. Her areas of specialization include strategic analysis, data analytics and visualization, competitive intelligence, and quantitative research.

“Judith truly ‘gets’ what’s important for users of business research and will vastly increase our capacity to generate more detailed retail sales estimates across the spectrum of the licensing business,” says EPM President and Licensing Letter Publisher Ira Mayer. EPM is a division of Business Valuation Resources.

“In positions at Find/SVP (now Guideline), Ernst & Young, and Paul, Weiss, Rifkind, Wharton & Garrison, I’ve subscribed to and used EPM’s newsletters as well as Pratt’s Stats, BVR’s premier database on private company valuations,” adds Judith. “I know as an ‘information consumer’ what marketers need, and look forward to expanding on THE LICENSING LETTER’s already substantial body of licensing data.”

Judith will be working directly with Mayer and TLL Special Projects Editor Karen Raugust updating our annual research studies and adding new titles to our series of reports.

### Who’s News

**Ana de Castro** is promoted to SVP/deputy general counsel, Warner Bros. Entertainment, focusing on franchise properties and commercial opportunities worldwide.

**Jeffrey Katzenberg**, CEO of DreamWorks, to keynote Licensing Expo in Las Vegas, Tuesday, June 17.

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# Can you compete in the \$10.4 billion global preschool market?

## THE GLOBAL MARKET FOR LICENSED PRESCHOOL PROPERTIES

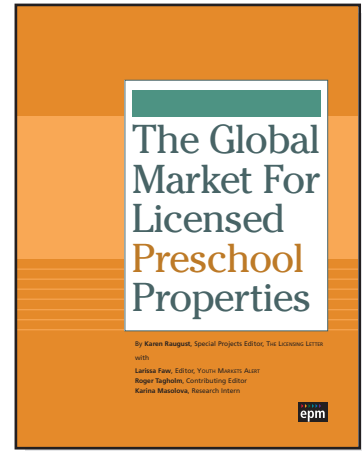
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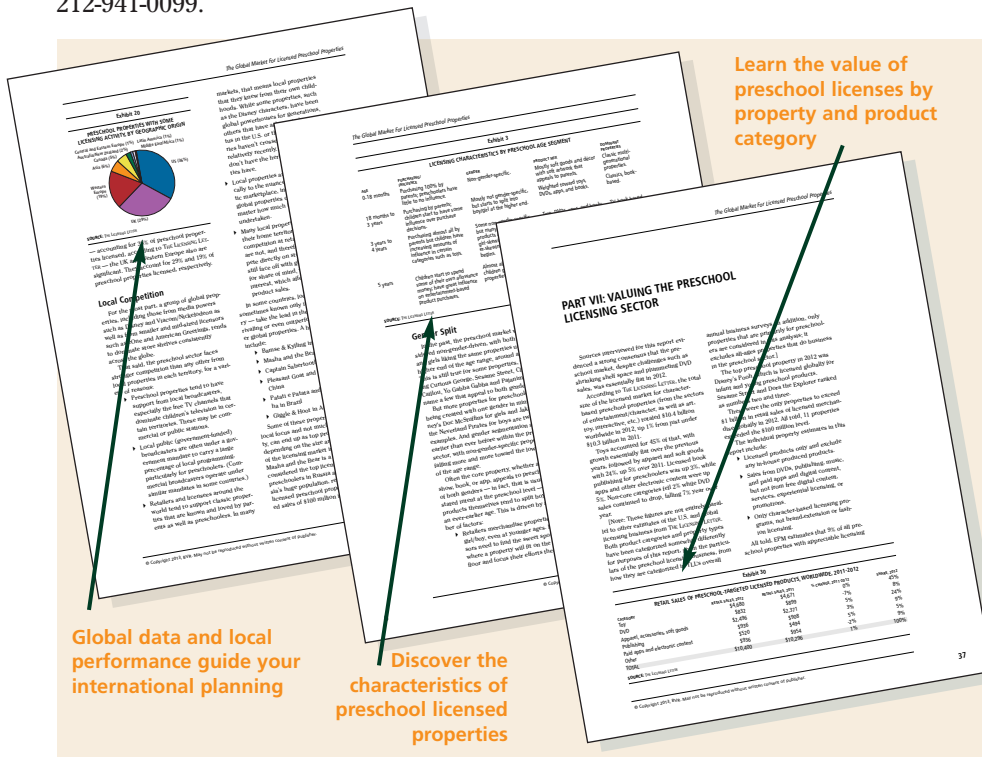
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# THE GLOBAL MARKET FOR LICENSED PRESCHOOL PROPERTIES

## INTRODUCTION AND EXECUTIVE SUMMARY

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- Benjamin the Elephant
- Berenstein Bears
- Chuggington
- City of Friends
- Clifford the Big Red Dog
- Dinosaur Train
- Doc McStuffins
- Dora the Explorer
- Fancy Nancy
- Fifi and the Flowertots
- Galinha Pintadinha
- The Hive
- Ladybug Girl
- Masha and the Bear
- Miffy
- Peppa Pig
- Pocoyo
- Postman Pat
- Rastamouse
- Sesame Street
- Strawberry Shortcake
- Thomas & Friends
- Timmy Time
- Toopy & Binoo
- Tree Fu Tom
- Waybuloo
- The Wiggles
- World of Eric Carle

## CONTACTS AND CONNECTIONS

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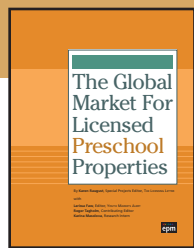
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