

TLL THE LICENSING LETTER

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Retail Sales of Licensed Goods Up 2.2% in U.S./Canada in 2013; Toys, Fashion, Food Pace Growth

Retail sales of licensed merchandise in the U.S. and Canada grew to nearly \$97.5 billion in 2013, according to *The Licensing Letter's Annual Licensing Business Survey*. That represents an increase of 2.2% over the \$95.4 billion in retail sales of licensed goods generated in 2012.

This marks the third year in a row that the licensing business in the U.S. and Canada has seen an increase, after five years of declines from 2006 through 2010. But the 2.2% growth rate in 2013 was more anemic than many observers had expected earlier in the year, barely surpassing the 2.1% increase the business experienced in 2012.

"Despite the fact that the recession has been officially over for years, the majority of consumers have not felt the positive effects of what the media claims is a modestly rising economy," says one respondent. "And those consumers who do feel more confident in their jobs and a rising economy seem to be focusing more on durable goods and housing versus discretionary/impulse spending."

Licensing Versus Generics

On the positive side, the licensing business outperformed the economy as a whole, which many economists estimate grew between 1% and 2% in 2013. *The CIA World Factbook* has pegged GDP growth for that year at 1.6% in both the U.S. and Canada.

In fact, the strength of licensing vis-à-vis consumer products as a whole was evident in a number of industries last year:

- ▶ Retail sales of licensed interactive games declined 7.4%, according to *TLL* estimates, but console and portable video games as a whole fell 9% and PC games were down 11%, per NPD and Superdata.
- ▶ Licensed toys grew 3.2%, per *TLL* estimates, while toys overall were down 1%, according to the NPD Group and the Toy Industry Association. (Their estimate of licensed toys' performance, up 3%, was

similar to *TLL's*.)

- ▶ Licensed fragrances experienced a 3.5% increase in 2013 (albeit down from 5.9% in 2012), while the fragrance industry in general grew only 0.02%, according to Euromonitor.
- ▶ Licensed publishing fell 6.9%, compared to a drop of 9.7% for children's books (where much of the licensing occurs in this category) for the first 10 months of the year, according to the latest figures available at press time from the Association of American Publishers. (Note: Most of these estimates do not align directly with the categories *TLL* uses, but they show the general trends and are valuable for comparison's sake.)

Similarly, several public companies revealed licensing results that outpaced their results

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NOT JUST TO COMMUNICATE

Licensing Community Seeks to Embrace Social Media

Respondents to *The Licensing Letter's 2014 Annual Licensing Business Survey* enumerated several challenges affecting their ability to drive licensed product sales in the U.S. and Canada. Some of the primary issues were the same concerns that come up year after year.

This year, however, the top trend cited overall was the impact of social media and the struggle to utilize it effectively for distribution, for communication with consumers and the trade, as a source of new properties, and especially for marketing and promotions.

More than half (57%) of survey respondents doing business in the U.S. and Canada mentioned social media as a key trend in 2013. A similar percentage of global respondents

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in short

A C9 by Champion 55 cm. fitness ball with pump and exercise guide is \$16.79 at City Target in Westwood, Calif.; a Gaiam 55 cm. ball with pump and workout DVD is \$25.99 at the same store.



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➡ Licensing Ledger

KLEINFELD WEDS TO LICENSING

Joining the trend of retailers extending their names through licensing, **Kleinfeld Bridal**, the New York City-based luxury bridal retailer (which serves as the location for "Say Yes to the Dress" on TLC) has licensed **Kahn Lucas** to produce a line of Kleinfeld-branded dresses for young girls under the Kleinfeld Pink Label brand. The dresses, the first under the Kleinfeld name, will launch in the fourth quarter in high-end retailers.

CHEW ON THIS

Useful Home Products has acquired the rights to market cookware, bakeware, food prep tools, cutlery, and cutting boards tied to ABC's cooking-centric talk show "The Chew." The products debut at this month's International Home + Housewares Show in Chicago.

NASTY GAL CONSIDERS LIMITED LICENSING

Sophia Amorusa, founder of **Nasty Gal**, an online retailer that carries its own branded products and those from third parties, tells *WWD* that the company would be open to licensing for fragrance and cosmetics but notes that "licensing can be tricky" and that she and her team would "tread lightly." The brand has recently expanded into footwear, denim, and apparel and has plans for lingerie and a bricks-and-mortar store this year.

STEFANI LAUNCHES ACCESSORIES, LINGERIE

Singer/fashion designer Gwen Stefani adds accessories and lingerie collections. Lingerie maker **Hanky Panky** is teaming with Stefani for four collections co-branded with her L.A.M.B. label. **ShoeDazzle** will be the exclusive source for a new accessories line, gx by Gwen Stefani, encompassing shoes and handbags sold through a dedicated boutique on ShoeDazzle.com.

AMIEE LYNN GIVES LIFE TO ACTIVEWEAR

Brunswick-owned **Life Fitness**, a manufacturer of commercial and home fitness equipment including Lifecycle exercise bikes, is expanding into apparel through a licensing deal with Amiee Lynn. The latter, which also holds licensing rights to Lucky Brand, Nautica, Jones New York, Jessica Simpson, Field & Stream, Stanley, and several other labels, will design, manufacture, and market a line of activewear sold through specialty stores and online.

MEGA DEAL FOR MATTEL

Mattel is acquiring **Mega Brands** in a \$460 million deal. The purchase strengthens Mattel's position in the growing construction toy category, where Mega Bloks is the number-two player after **LEGO**, and in arts and crafts, through Mega's **Rose Art** division. Mega, which will continue to operate from its Montreal headquarters, holds licenses including Assassin's Creed, Call of Duty, Halo, Hello Kitty, Power Rangers, Skylanders, and Sponge-Bob SquarePants.

DRINKS FIT FOR KINGS AND SLUGGERS

Add **Three Olives'** Elvis Presley Coconut Water Flavored Vodka to the growing list of licensed vodkas, beers, wines, and other spirits. The Elvis vodka, to be released this month, is themed

around the musician's history in and visits to Hawaii and joins a spirits roster that also includes a Marilyn Monroe Strawberry Vodka. Need some coffee afterwards? **White Coffee** has Joltin' Joe, under license from **Joe DiMaggio LLC**, while **Krispy Kreme** and **Crumbs Bake Shop** have coffees, and Dunkin' Donuts has added licensed coffee creamers to be sold in grocery and club stores. See Karen Raugust's *TLL* blog, at www.epmcom.com/RaugustOnLicensing, for more on restaurant and bakery chains' recent coffee license agreements.

A KATY PERRY EXCLUSIVE

Accessories store **Claire's** adds the Katy Perry PRISM Collection of fashion and jewelry to its offerings. The line launches this May in conjunction with Perry's Prismatic World Tour. The "limited edition" items will be available at Claire's retail locations and **Claire's.com** through 2016. **Bravado** represents Katy Perry for licensing.

ONLINE GAMBLING

Ocho Gaming and **Metric Gaming** have partnered to distribute sports betting products tied to Mexico's Liga MX and Peru's Primera Division soccer leagues across Latin America. Separately, DoubleDown Casino, a social gaming site owned by **International Game Technology (IGT)**, is launching a Hasbro-licensed social slot game, "Transformers: Battle for Cybertron," for desktop and mobile devices.

SHREK ATTRACTS

DreamWorks Animation has licensed **Merlin Entertainments** for a Shrek visitor attraction in London, to open in 2015, the first of six locations planned to debut over the next nine years.



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Retail Sales Up

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as a whole (globally). Martha Stewart saw total revenues decline more than 18% in 2013, but royalties from merchandise were up 4.2%; Hasbro's total revenues were up less than 1%, but sales of licensed toys were up 5.25%; and Perry Ellis International/PEI saw total results down 5% for the year, but royalty income was up 8%. (Some other fashion licensors, however, including PVH and Ralph Lauren, saw the opposite situation, with royalties declining as the rest of the business increased.)

"One thing about licensing is it's a differentiator," says one executive interviewed for this report. "You need that at retail. It helps consumers make those positive decisions in the store. If you don't have time for research, your default is the license."

Overriding Trends

Three social trends drove growth that cut across several property types, product categories, and distribution channels:

- ▶ **Americana.** Properties from Duck Dynasty to Mossy Oak to Remington Arms rode this trend to higher results, according to respondents, as did retailers in the outdoors space (e.g., Cabela's), product categories such as workwear, and American-made products. "Mossy Oak did best for us, beating Disney numbers," said one licensee, while another added, "We are implementing a huge swing toward USA-based manufacturing. This will be positive for our

brand, and social compliance goals, but may negatively impact our royalties generated."

- ▶ **Wellness.** Business segments benefitting from this trend included performance/functional apparel, yoga and fitness gear, supplements, and fruit- and vegetable-powered, gluten-free, and organic foods; certain food brands, gym and sports properties, and

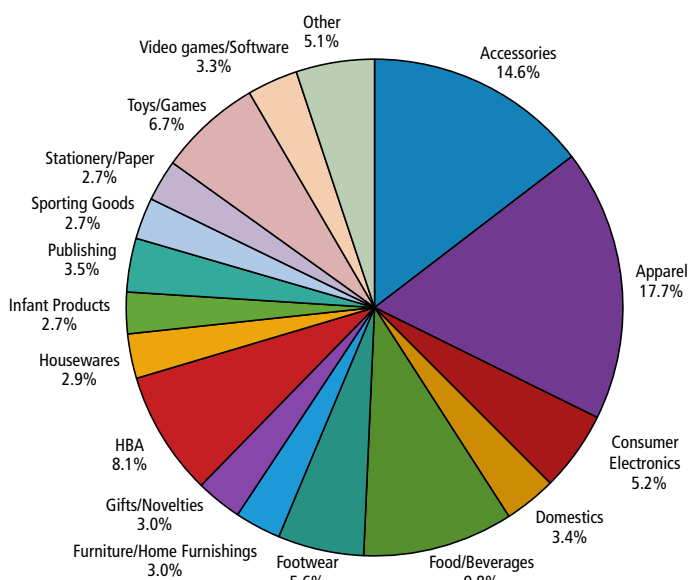
RETAIL SALES OF LICENSED MERCHANDISE, BY PRODUCT CATEGORY, U.S./CANADA, 2012-2013 (DOLLARS IN MILLIONS)

PRODUCT CATEGORY	RETAIL SALES, 2013	RETAIL SALES, 2012	CHANGE, 2012-2013	SHARE OF MARKET, 2012
Accessories	\$14,264	\$13,912	2.5%	14.6%
Eyewear	\$4,428	\$4,278	3.5%	4.5%
Handbags, Backpacks, Messenger Bags	\$2,010	\$1,954	2.9%	2.1%
Headwear	\$1,319	\$1,270	3.9%	1.4%
Hosiery	\$550	\$553	-0.6%	0.6%
Jewelry and Watches	\$3,352	\$3,260	2.8%	3.4%
Luggage and Travel Accessories	\$1,395	\$1,358	2.7%	1.4%
Scarves and Ties	\$155	\$157	-1.1%	0.2%
Other	\$1,055	\$1,081	-2.4%	1.1%
Apparel	\$17,288	\$15,992	8.1%	17.7%
Consumer Electronics	\$5,079	\$4,875	4.2%	5.2%
Domestics	\$3,342	\$3,352	-0.3%	3.4%
Food/Beverages	\$9,534	\$8,885	7.3%	9.8%
Footwear	\$5,415	\$5,481	-1.2%	5.6%
Furniture/Home Furnishings	\$2,947	\$3,026	-2.6%	3.0%
Gifts/Novelties	\$2,952	\$3,091	-4.5%	3.0%
HBA	\$7,911	\$7,606	4.0%	8.1%
Fragrance	\$4,242	\$4,098	3.5%	4.4%
Hair Accessories	\$265	\$263	0.8%	0.3%
Cosmetics/Nail Polish/Other	\$3,404	\$3,245	4.9%	3.5%
Housewares	\$2,785	\$2,707	2.9%	2.9%
Infant Products	\$2,663	\$2,608	2.1%	2.7%
Publishing	\$3,426	\$3,680	-6.9%	3.5%
Sporting Goods	\$2,605	\$2,542	2.5%	2.7%
Stationery/Paper	\$2,618	\$2,759	-5.1%	2.7%
Toys/Games	\$6,510	\$6,308	3.2%	6.7%
Video games/Software	\$3,184	\$3,439	-7.4%	3.3%
Other	\$4,948	\$5,106	-3.1%	5.1%
Hardware and Paint	\$303	\$301	0.7%	0.3%
Gardening	\$226	\$219	3.1%	0.2%
Pet Products	\$410	\$397	3.3%	0.4%
Funerary	\$10	\$10	-2.4%	0.0%
Automotive Accessories	\$365	\$385	-5.3%	0.4%
Boats and Vehicles	\$516	\$500	3.2%	0.5%
Other	\$3,118	\$3,293	-5.3%	3.2%
TOTAL	\$97,471	\$95,366	2.2%	100.0%

Note: Numbers may not add up exactly due to rounding.

SOURCE: THE LICENSING LETTER

RETAIL SALES OF LICENSED MERCHANDISE, BY PRODUCT CATEGORY, U.S./CANADA, 2013 (DOLLARS IN MILLIONS)



Note: Numbers may not add up exactly due to rounding.

SOURCE: THE LICENSING LETTER

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Retail Sales Up

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fitness celebrities; experiential extensions such as UFC gyms and Cirque du Soleil fitness classes; and promotions, such as the NBA Fit Food program at Walmart.

- **Technology.** Again this year, technology had an impact on property types (more properties originating in blogs and on YouTube), product categories (wearable technology and children’s tech, although tech accessories are showing signs of saturation), and other aspects of the business (e-commerce, crowdsourcing, crowdfunding, social-media marketing, more content distribution venues, etc.).

Entertainment/Character Turnaround

The entertainment/character sector saw a reversal from a 3.7% decline in 2012 to 3.6% growth in 2013. This is particularly significant since this sector has declined every year since the recession began in 2008.

The increase was driven by an eclectic group of films (*Frozen* and *Despicable Me 2*), TV shows (“Sofia the First,” “Doc McStuffins,” “Teenage Mutant Ninja Turtles,” “Duck Dynasty,” “Big Bang Theory,” and a variety of cable series for adults such as “Breaking Bad,” “The Walking Dead,” “Dexter,” and “Sons of Anarchy”). The Disney/Marvel/Lucas portfolio continues to dominate store shelves in

many categories, and Hello Kitty also remains strong, although several respondents suggested that her sales may be softening in the U.S. and Canada.

In addition, the growing ties between the fashion industry and entertainment/character properties also helped give life to the sector, from new apparel-friendly and on-trend style guides to fast-fashion deals to designer collaborations.

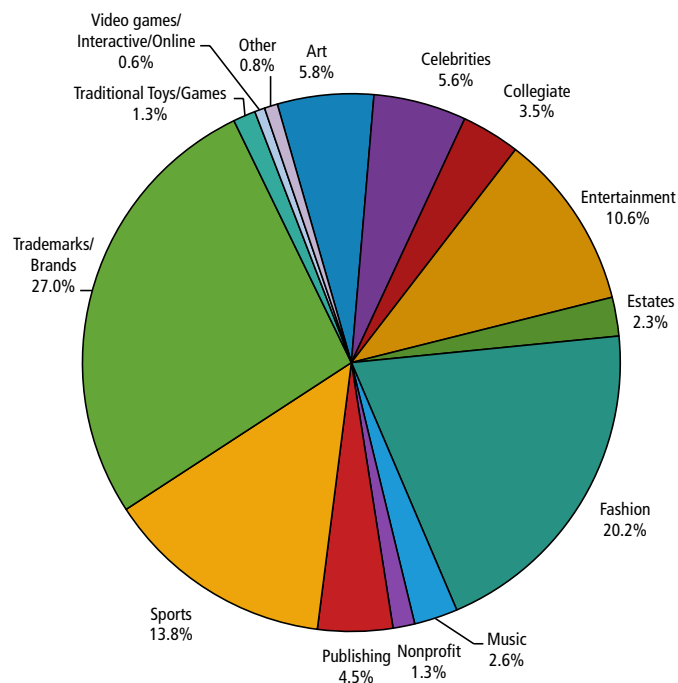
RETAIL SALES OF LICENSED MERCHANDISE, 2012-2013, BY PROPERTY TYPE (DOLLARS IN MILLIONS)

PROPERTY TYPE	RETAIL SALES, 2013	RETAIL SALES, 2012	CHANGE, 2012-2013	SHARE OF MARKET, 2013
Art	\$5,641	\$5,586	1.0%	5.8%
<i>Art and Artists</i>	\$4,254	\$4,220	0.8%	4.4%
<i>Museums</i>	\$1,387	\$1,366	1.5%	1.4%
Celebrities	\$5,444	\$5,336	2.0%	5.6%
<i>Entertainers/Models</i>	\$2,490	\$2,443	1.9%	2.6%
<i>Chefs/Home-Related</i>	\$2,082	\$2,027	2.7%	2.1%
<i>Other</i>	\$873	\$866	0.8%	0.9%
Collegiate	\$3,430	\$3,370	1.8%	3.5%
Entertainment	\$10,376	\$10,015	3.6%	10.6%
Estates	\$2,274	\$2,238	1.6%	2.3%
Fashion	\$19,654	\$18,881	4.1%	20.2%
<i>Apparel</i>	\$16,612	\$15,927	4.3%	17.0%
<i>Footwear</i>	\$2,418	\$2,343	3.2%	2.5%
<i>Home</i>	\$624	\$611	2.1%	0.6%
Music	\$2,556	\$2,479	3.1%	2.6%
Nonprofit	\$1,277	\$1,294	-1.3%	1.3%
Publishing	\$4,388	\$4,382	0.1%	4.5%
<i>Books</i>	\$513	\$529	-3.1%	0.5%
<i>Newspapers/Magazines</i>	\$2,622	\$2,528	3.7%	2.7%
<i>Comic Books/Strips</i>	\$1,253	\$1,324	-5.4%	1.3%
Sports	\$13,437	\$13,071	2.8%	13.8%
Trademarks/Brands	\$26,314	\$26,106	0.8%	27.0%
<i>Automotive/Motor Vehicle</i>	\$3,920	\$3,944	-0.6%	4.0%
<i>Food/Beverage</i>	\$7,022	\$6,759	3.9%	7.2%
<i>Restaurants</i>	\$4,424	\$4,291	3.1%	4.5%
<i>Sporting Goods</i>	\$1,310	\$1,305	0.4%	1.3%
<i>Hardware, Appliance and Tool</i>	\$2,681	\$2,650	1.2%	2.8%
<i>Home-related</i>	\$374	\$366	2.2%	0.4%
<i>Electronics/Technology</i>	\$3,063	\$2,977	2.9%	3.1%
<i>Electronic Media</i>	\$220	\$217	1.2%	0.2%
<i>Other</i>	\$3,299	\$3,598	-8.3%	3.4%
Traditional Toys/Games	\$1,313	\$1,259	4.3%	1.3%
Video games/Interactive/Online	\$598	\$577	3.6%	0.6%
Other	\$769	\$772	-0.3%	0.8%
TOTAL	\$97,471	\$95,366	2.2%	100.0%

Note: Numbers may not add up exactly due to rounding.

SOURCE: THE LICENSING LETTER

RETAIL SALES OF LICENSED MERCHANDISE, U.S./CANADA, 2013, BY PROPERTY TYPE (DOLLARS IN MILLIONS)



Note: Numbers may not add up exactly due to rounding.

SOURCE: THE LICENSING LETTER

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Retail Sales Up

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In fact, entertainment/character licensing saw the third-highest growth rate of any property type in the U.S. and Canada in 2013, behind only toys and games and fashion. Toys and games showed an increase of 4.3%, driven by a raft of strong properties including Monster High, LEGO, My Little Pony, and Lalaloopsy.

Fashion was up 4.1%, slightly less than its growth rate of 4.7% in 2012. Its strength was due in part to continued acquisitions by investment groups, which tend to boost licensing activity and/or lead to the transition of labels into fully licensed brands. In addition, a number of fashion labels launched new licensed lines in 2013, encompassing everything from lingerie and luggage to pet products and personal electronics.

Corporate licensing rose by 2.8%, the second year of relatively sluggish growth (following an increase of 2.2% in 2012). While food/beverage and restaurant brands remain strong (with growth of 3.9% and 3.1%, respectively, both slightly lower than in 2012), others were flat as retailers became more conservative about supporting new corporate brands.

Properties from the interactive/digital world grew 3.6%,

2013 RETAIL SALES VARIED WIDELY—AND FOR VARIED REASONS

As was the case in 2012, individual respondents to the 37th Annual Licensing Letter Licensing Business Survey reported wildly varying results for their own businesses, even compared to other respondents whose property types, product categories, geographic territories, and other variables were similar.

In 2013, 66% of respondents doing business in the U.S. and Canada reported higher retail sales of licensed merchandise in that territory, versus 21% who reported lower sales and 13% who saw flat sales of licensed goods. The range of results varied from year-on-year declines of 50% to growth of 500%.

Of those reporting growth, 42% saw increases in the single digits, 54% in the double digits, and 4% in the triple digits. Of those reporting declines, 35% had decreases in the single digits, versus 65% in the double digits.

Many of the respondents who had big gains in 2013 noted that much of the increase was due to entirely new business areas—including new distribution channels, new territories (e.g., expansion into Canada), the introduction of new product categories, or the signing of new agreements—rather than year-over-year comp sales.

"We grew, but mainly due to strong growth from just one license and one product within that license," said one respondent.

Added another, "Overall our business increased, but because we increased the portfolio of licensed products (and expanded territories outside of North America). In the U.S., on a per-SKU basis, licensed items sold at a lesser velocity than non-licensed items."

Survey participants, on average, reported that U.S. performance was slightly higher than results in Canada, despite their nearly equal overall economic status in 2013. Within the U.S., the South and Midwest were, as a rule, flat when it came to the sales of licensed merchandise; the West Coast, Southwest, and Southeast (especially Florida) were up; and the Northeast was down.

SURVEY METHODOLOGY

TLL's estimate of the size of the licensing business was compiled through its online survey of global licensing executives, conducted in January 2014; third-party research of overall category and industry size; dozens of in-depth interviews with licensing executives, both for this survey and throughout the year; annual reports and other corporate information from retailers, licensees, and licensors; and news articles from trade publications covering trends in the respective product categories and property types touched by licensing.

Respondents included licensors (37%), licensing agents (28%), licensees (37%), consultants (10%), and other allied professionals (7%), with some having multiple roles. They were based in all territories around the globe; for this portion of the survey coverage, which focuses only on the U.S. and Canada, results include responses only from those respondents doing business in that territory and only those responses that relate to this specific territory.

More results from TLL's Annual Licensing Business Survey will be forthcoming in future issues, including trends in royalty rates and payment structures, distribution trends, and product category results by key property types for U.S. and Canada, as well as coverage of the size of the global licensing business and trends in territories outside the U.S. and Canada.

a healthy increase compared to other sectors but far below the 8.9% growth it saw in 2012. Properties such as Skylanders and Minecraft were strong, several adult-themed console games ("World of Warcraft," "Halo") maintained their profiles, and YouTube- and blog-originated properties started to emerge in a small way. But Angry Birds is reportedly beginning to fall off and no other of the many highly touted mobile game properties available are filling the gap to date, respondents say.

Despite ongoing concerns about oversaturation, celebrity licensing was up 2%, versus 3% the previous year. Much of the growth came from mass and discount distribution tiers, such as the Sofia Vergara and Adam Levine programs at Kmart.

Ramifications of Technology

Most of the product categories that declined precipitously in 2013 were those facing the most severe challenges from technology, either as competition to traditional physical products or due to changing distribution, or both.

They included, as noted earlier, both video games/software (down 7.4%) and publishing (down 6.9%), with books, art prints, and calendars among the most affected segments within the latter category. In addition, stationery/paper was down 5.1%. Hallmark's exit from the paper party goods segment is likely to cause a further disruption in this category, at least in the short term.

Meanwhile, retail sales of licensed consumer electronics rose 4.2%, a strong performance but less than the 6.2% pace it experienced in 2012.

The other major declining product category, gift/novelty, was affected more by the economy than tech trends. Low consumer confidence reduces nonessential purchasing, affecting everything from licensed impulse novelties to

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Licensing News

Properties Available Or Recently Assigned, U.S.

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Son of God	Upcoming film adapted from miniseries The Bible	All	Ross Misher, Brand Central

Licenses Recently Granted, U.S.

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Adventure Time	FAB/Starpoint	Backpacks, bags, gift items, luggage, travel accessories	Cartoon Network Enterprises
	Hybrid Apparel	Apparel (girls')	
	Intimo	Sleepwear	
	MJC International Group	Loungewear, sleepwear, underwear	
	MZ Berger & Co.	Clocks, watches	
	Robe Factory	Bath mats, rugs, shower curtains, towels	
	Rook Brand Clothing	Specialty apparel	
Assassin's Creed	Mega Brands America	Construction toys	Ubisoft
Chiquita	Quirch Foods	Frozen foods	Beanstalk
Coca-Cola	OPI	Nail lacquers	Coca-Cola
DC Comics	Bandai America	Construction toys	Warner Bros. Consumer Products
DC Super Heroes	World Tech Toys	RC action figures	Warner Bros. Consumer Products
Deep Silver Games	BioWorld Merchandising	Bags, belt buckles, belts, headphones, headwear, jewelry, key chains, mobile accessories, nightwear, purses, socks, T-shirts, tops, underwear, wallets	Game of 2 Halves
Duck Dynasty	Sakar International	Audio electronics, USB flash drives	Brandgenuity
Elvis Presley	Card.com	Prepaid debit cards	Authentic Brands Group
	Proximo Spirits	Flavored vodka	
Ever After High	Sakar International	Mobile accessories	Mattel
Game of Thrones	Concept One Accessories	Bags, cold weather accessories, headwear, wallets	HBO
Garfield	Buckle-Down	Accessories, bags, belts, buckles, guitar straps, key chains, pet accessories, purses, wallets	Paws, Inc.
	Eyeverting	Sunglasses	
Ghostbusters	World Tech Toys	RC vehicles	Sony Pictures Consumer Products
Gravity Falls	Jazwares	Figures, playsets, plush, role play	Disney Consumer Products
Halo	Bandai America	Construction toys	343 Industries Microsoft
Hawken	Cryptozoic Entertainment	Card games	Dimensional Branding Group
Hello Kitty	Minnetonka	Moccasins	Sanrio
Heroes of the Storm	USAopoly	Co-branded board games	Blizzard Entertainment

*Extension or renewal.

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Licensing News *Continued from page 6*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
HillBilly Brand	Bell/Ranger Outdoor Apparel	Diaper shirts, dresses, fleece, lingerie, outerwear, pajamas, sleepwear, swimwear, T-shirts	Trademarking Resources
	US Digital Media	Electronics, mobile accessories	
How to Train Your Dragon 2	FunKo	Vinyl figures	DreamWorks Animation
Jennifer Adams	Fizzion	Cleaning products	All-American Licensing & Management Group (AALMG)
NBA	Jazwares*	Action figures, playsets, toys	NBA Global Merchandising Group
	World Tech Toys	RC action figures, RC vehicles	
Nintendo	USAopoly	Co-branded board games	Nintendo of America
Peeps	DanDee	Bags, baskets, novelty purses, pillows, plush	Lisa Marks Associates (LMA)
	Yankee Candle	Auto fragrance, home fragrance, scented candles	
Plants vs. Zombies	USAopoly	Co-branded board games	Electronic Arts
Portal	Cryptozoic Entertainment	Board games	Valve Corporation
Power Rangers	JAKKS Pacific*	Halloween accessories, Halloween costumes	Saban Brands
	Sakar International	Electronics	
Self	Benevida Foods	Packaged foods	FremantleMedia Enterprises
Skylanders	Crayola	Coloring kits	Activision
SpongeBob SquarePants	Mega Brands America	Construction toys	Nickelodeon
Star Trek	Icon Heroes*	Office accessories	CBS Consumer Products
	Soft Stuff Creations*	Golf club covers	
Star Wars Rebels	Jazwares*	Electronic toys	Lucas Licensing
Walking Dead (The)	Underground Toys	Aprons	Striker Entertainment
WWE	Underground Toys	Talking plush	WWE
	USAopoly	Co-branded board games	

International Properties Available or Recently Assigned

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Hannibal	NBCUniversal and Gaumont International Television's prequel TV series to the Hannibal Lecter book series	Accessories, apparel, collectibles, fragrance, games, home decor, home furnishings (Worldwide)	Travis Rutherford, Evolution
It's a Wild Life	Form Advertising's new light-hearted design property featuring wildlife with human-like traits, complete with humorous captions.	Accessories, stationery, wall art, youth fashion (U.S., Europe)	Vicky Hill, Bulldog Licensing
Maya the Bee	Studio 100's CG animated children's show, soon to be a feature film.	Accessories, apparel, games, plush toys (Australia, New Zealand)	Beatriz Seligmann, Australian Broadcasting Corporation
Nutri Ventures	Animated series promoting healthy eating. Planeta also represents the series for TV rights.	All (Spain, Italy, France, Greece, Estonia, Latvia, Lithuania, Poland, Slovakia, Romania, Bulgaria, Slovenia, Croatia, Albania, Serbia, Montenegro, Kosovo, Macedonia, Turkey)	Ignacio Segura de Lassaletta, Planeta Junior SL

*Extension or renewal.

Continued on page 8

Licensing News *Continued from page 7*

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Real Madrid	Madrid-based football club founded in 1902.	Apparel, back-to-school, electronics, games, gifts, home furnishing, homewares, novelties, personal care, sporting goods, statues, toys (India)	Jiggy George, Dream Theatre
Temple Run	Imangi Studios' running game for iOS and Android platforms.	All (Nordics)	Anna Rosmalm, Bulls Licensing
Winx Club	Girls brand/television show about young fairies balancing everyday life with the struggle against evil.	All (Scandinavia)	Jape Kantola, Screening Agency
Wolfblood	CBBC fantasy/drama series about two human teenagers with the ability to turn into wolves.	Accessories, apparel, board games, card games, stationery (U.K.)	Vicky Hill, Bulldog Licensing

International Licenses Recently Granted

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Caillou	Imports Dragon*	Doll with sound (North America)	DHX Media
Cinnabon	Reckitt Benckiser	Air fresheners (U.S., Canada)	Focus Brands
Donald J. Trump Signature Collection	Premium Brands Footwear	Casual shoes, dress shoes (Mexico)	Trump Organization
Garfield	IMap Export S.P.A.	Accessories, apparel (Albania, Armenia, Azerbaijan, Benin, Bosnia, Bulgaria, Cameroon, Cyprus, Czech Republic, Egypt, France, Gabon, Italy, Ivory Coast, Kuwait, Lebanon, Libya, Macedonia, Malta, Montenegro, Morocco, Poland, Romania, San Marino, Saudi Arabia, Senegal, Slovakia, Switzerland, Tunisia, Turkey, Ukraine, UAE)	B.I.C. Licensing
	KV&H Verlag gmbH	Calendars (Germany, Austria, Switzerland)	Bulls Licensing
Hinchcliffe & Barbar	My Gifts Trade	Garden accessories, housewares, stationery (U.K.)	JELC Ltd./Blue Trellis
Lotta Jansdotter	Ashley Wilde	Cushions, fabrics, linens (U.K.)	Boom Licensing
Mister Maker	PMS International	Bath toys, figurines, key chains, plush (U.K.)	Zodiak Rights
	Trademark Collections	Backpacks, bags, purses, rucksacks, umbrellas, wallets (U.K.)	
Moshi Karts	Vivid Imaginations*	Toys (U.K.)	Mind Candy
Niloya	PAL Oyuncak	Toys (Turkey)	KAYNAK Copyright & Licensing Agency
Rugby Football Union	Stonegate	Branded eggs (U.K.)	Copyright Promotions Licensing Group Sport (CPLG Sport)
Simpsons (The)	Hornby Hobbies	Toy car sets (Worldwide)	20th Century Fox Consumer Products
Skylanders	General Mills	Fruit snacks (North America)	Activision
Subway Surfers	Fashion U.K.	Apparel (U.K.)	Evolution Europe
World of Eric Carle	KV&H Verlag gmbH	Calendars, monthly planners (Germany)	Joester Loria Group
WWE	Mattel*	Master toy (Worldwide)	WWE

*Extension or renewal.



contacts & connections

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Continued on page 10

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TLL Licensing Survey

Continued from page 3

mirrored these results. “It feels to me that people are starting to figure out how to use social as a real part of the total marketing package this past year,” said one licensor in the entertainment/character segment.

Related issues include:

- ▶ Competition from social media affecting sales of products such as traditional toys or books, as well as taking time from traditional media sources.
- ▶ The emergence of properties originating on YouTube, blogs, Instagram, Pinterest, Vine, Twitter, and other venues.
- ▶ The role of social media in crowdsourcing and crowd-funding new properties, products, and initiatives.
- ▶ The use of social media such as Instagram and Snapchat to not only bring a massive following, but also generate income from click-throughs. “With millions of likes, followers, and Facebook friends, you have something of value,” says a licensor of celebrity-driven properties.
- ▶ The need for bite-sized content to exploit on these new channels. “Short-form content is the up-and-comer,” said a licensor, while an agent added, “Video content creation as a part of the marketing platform is key.”

In the 2012 survey, all eyes were on Facebook and, to a lesser degree, Twitter, as replacing websites and e-commerce as a primary digital media, marketing, and sales vehicle. In 2013, there was little mention of Facebook, with the attention being paid to newer alternatives, and Pinterest and Instagram generating the most discussion.

“In order for you to benefit [from social media marketing], you have to have something that’s shareworthy,” says one U.S.-based agent. “The currency of young people today is their status in the digital landscape. If you’re providing shareworthy news, others will look to them for information, and that’s powerful. Pay attention to that. But there also has to be a great deal of honesty, and there has to be a great product.”

While social media is an acknowledged fact of life, several respondents were concerned that other more traditional and still necessary forms of marketing and content distribution are falling by the wayside. “My licensee refused to spend any money on advertising and marketing, other than trade shows, Facebook postings, and email blasts,” said one U.S.-based licensor. “They have lost confidence in catalogs and trade magazines; feel they are too expensive. They seem to believe they can reach the market with [only] Facebook and e-mail blasts. The first thing they cut is an advertising and marketing budget.”

And not all social media venues, even if effective for marketing and promotion, drive sales. A licensee and licensing agent who sells primarily via e-commerce reports that Pinterest has replaced Facebook as the key driver in social media, “but we’re not seeing conversion from consumers’

interest in Pinterest.”

Other tech-related issues that came up in the survey included alternative content distribution possibilities, including Netflix, Hulu, Amazon, and many others. They further fragment the media landscape and require licensors to utilize multiple “touchpoints” to reach consumers with marketing messages and content.

“We need to adapt to the fact that kids are expecting immediacy and consumption of their favorite properties across multiple platforms,” said one executive. “Properties where the consumers can fully immerse themselves across multiple platforms and through various product purchases are generally doing really well.”

The use of technology in products also came up, especially related to wearable technology, personal electronics, and toys. Its use is evolving, some respondents and interviewees believe. “It’s not just bells and whistles,” says a licensor. “There’s an acknowledgement that it’s not technology just for technology’s sake. And that’s refreshing.”

Respondents also were concerned with the fast rise of e-commerce (perceived as both a positive and a negative, depending on the nature of the respondent’s business) and the struggles of mobile-origin properties beyond Angry Birds to gain traction in the marketplace.

The pace of change is yet another issue. “Media is moving so fast that by the time we master a new technology a new one comes along, making what we just learned obsolete,” says a licensor.

In the next issue we’ll report on survey respondents’ concerns regarding the retail landscape, pressures to lower prices and discount merchandise, and the dominance of a relatively few brands and properties on store shelves.

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Retail Sales Up

Continued from page 5

collectibles in 2013.

On the positive side, licensed apparel grew 8.1%, after a strong year in 2012 as well (when it was up 6.9%). The emphasis on fashion treatments and designer collaborations and the rise of particular categories such as licensed workwear and performance and functional apparel—both of which cross almost all property types—were among the drivers.

Food and beverage grew 7.3% in 2013, a significant improvement over an already-strong 2012 (when growth was 4.9%). The health and wellness trend and the seemingly never-ending number of brand-extension deals in the restaurant and food/beverage brand spaces helped spur this category's performance.

Hope Springs Eternal

Several respondents reported seeing a boost in activity in the fourth quarter of 2013. "People are willing to try new things in small doses," said one respondent.

Yet, when asked about the trends they see for 2014, respondents were almost universally negative, citing continued retail consolidation and lack of shelf space; dominance by a few successful licenses with no room for newer or smaller properties or product lines; continued consumer resistance to purchasing beyond the necessities;

low-price pressures that exist year round; and many of the other more negative trends they identified in 2013. (See also accompanying story.)

On the other hand, respondents doing business in the U.S. and Canada were overwhelmingly positive when predicting the performance of their own licensing activities in 2014. More than three-quarters (76%) thought their licensing business would grow, versus 18% who predicted flat results and just 6% who foresaw declines.

Furthermore, of those predicting growth, 73% thought their business would increase in double digits (most commonly from 10% to 20%), while 27% thought their increases would be in the single digits.

Who's News

Brand Central adds **Jennifer Campbell**, **Rebekah Belzer**, and **Megan Orecchia** to its staff. Campbell comes from computer accessories company Targus and will work out of Brand Central's new North Carolina office as VP licensing. Belzer will work in the Los Angeles office, also as VP licensing; she was most recently at Saban. Orecchia will serve as marketing manager, moving from the licensing department at CAA. Concurrently, Nancy Sanieoff is promoted to manager of licensing acquisitions.

Allison Lort joins Brandgenuity as director of business development. Lort previously served as director of licensing at Feld Entertainment, where she developed the licensing program for Monster Jam.

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The screenshot shows the ResearchAlert Pro website interface. At the top, it says "December 6, 2013" and "Contact the editor". The main heading is "ResearchAlert Pro»" with the tagline "THE DEFINITIVE SOURCE FOR RESEARCH ON CONSUMER SPENDING, BEHAVIOR AND ATTITUDES". Below this, there are several article teasers. The first is titled "Shopping & Spending, Online Habits & Trends, Mobile Devices" with a sub-headline "Mobile Shoppers Visit More Sites, More Often Than Those Shopping via Computer". It includes a bar chart titled "WHAT TIME OF DAY AMERICANS SHOP ONLINE, MOBILE VS. COMPUTER". The chart compares mobile and computer usage across six time slots: Early morning (6 a.m.-12 p.m.), Late morning (12 p.m.-4 p.m.), Early afternoon (12 p.m.-4 p.m.), Late afternoon (4 p.m.-8 p.m.), Evening (8 p.m.-12 a.m.), and Overnight (12 a.m.-4 a.m.). The second article is "Mature Market, Finance/Income, Workforce/Employment" with a sub-headline "Majority of Americans Expect to Retire Late or Not at All". It includes a pie chart titled "AMERICANS' PLANS TO WORK AFTER RETIREMENT 2013" showing four categories: Plan to work part-time (44%), Plan to work full-time (10%), Do not plan to work (19%), and Not sure (27%).

Time Slot	Mobile	Computer
Early morning (6 a.m.-12 p.m.)	19%	16%
Late morning (12 p.m.-4 p.m.)	19%	19%
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Factor	Percentage
Touchscreen usability/availability	41%
Battery life	40%
Design (look & feel)	40%
Phone size	40%
Operating system	40%
Brand	38%
Cost of monthly service plans	37%
Camera quality and usability	35%
Price	20%

SOURCE: Deloitte

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