

TLL THE LICENSING LETTER

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Average Royalty Rates in U.S. and Canada Hold Steady; Guarantees and Advances Fall, but Other Fees Increase

Royalties were generally flat in 2013, continuing a trend that has been ongoing for nearly a decade. The average royalty in 2013 was 8.67%, compared to 8.66% in 2012, a change of just 0.1%. Since 2005, the average royalty rate across property types and product categories has been in the 8.6%-to-8.8% range.

In fact, almost two-thirds (62%) of respondents to *TLL's Annual Licensing Business Survey* this year report that royalties were flat in 2013 compared to 2012, with 20% saying their average royalty increased (most often by a point or two), and 18% saying they decreased (with most of the declines in the two-to-three-point range).

Changes to average royalties were slight across individual property types and product categories as well. Among property types, entertainment/character rose the most (just 1.2%), from 9.32% to 9.43%. A number of respondents attributed the rise in entertainment/character royalties as being driven by Disney, which commands significant market share in that sector and has been demanding higher royalties, according to respondents.

Fashion, music, celebrity, and sports were among the other property types that also saw their average royalty rates rise in 2013, albeit all less than 1%.

Art and corporate brands saw their average royalties fall the most, again very slightly. The former declined from 6.31% to 6.30%, while the latter fell from 7.82% to 7.78%. For the most part, royalty fluctuations in both directions were in the 1%-or-less range across property types.

On the product category side, apparel deals saw royalties grow the most, from 9.33% to 9.44% (with royalties for DTR apparel deals called out by several respondents as up in 2013), followed closely by food and beverage deals, which increased from 5.87% to 5.93%. Conversely, toys and apparel saw the greatest

declines, according to survey participants.

The relative increases and decreases in average royalties across property types and product categories over the year align closely with the performance of retail sales of licensed goods in each, with the sectors performing the best in sales seeing, as a rule, slight increases in average royalty rates, and vice versa.

As has been the case over the last several years, the range of royalties within each property type and product category continues to widen, as licensors and licensees become more flexible and innovative in how they structure their deals and the gulf between the top mass-focused properties and the smaller, niche properties (and nonstarters) deepens.

Even as average royalties remain flat, several licensees note that the cost of licensing

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E-COMMERCE GAINING

Distribution of Licensed Products Grows at High and Low Ends

Trends in licensed product distribution in the U.S. and Canada in 2013 continued along the same lines as the last few years, according to *TLL's Annual Licensing Business Survey*, with channels at the very high and especially the very low end continuing to grab share from the middle tiers. And growth in e-commerce continued to outpace bricks-and-mortar.

The lowest-priced retail tier, consisting of dollar/value, club, and outlet stores, saw its share of market grow 0.3 percentage points in 2013, from 8.2% to 8.5% of all retail sales of licensed products. That translates to a 3.7% relative increase in share.

Well over three-quarters of respondents

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➡ Licensing Ledger



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RETAIL NOTES

LIDS Sports Group signs a 10-year deal with **Ohio State University Athletics** to offer a full range of licensed Buckeyes goods across all LIDS channels, including e-commerce (shop.ohiostatebuckeyes.com), on-campus retail, arena/stadium retail, and all game-day concessions.

Lane Bryant establishes a direct-to-retail (DTR) licensing agreement for lingerie with French designer **Sophie Theallet**. The retailer will sell the collection under its Cacique brand in 800-plus stores nationwide. Designers Isabel and Ruben Toledo have a DTR deal with the chain that started with licensed T-shirts and tote bags and has since expanded to a full line.

Hastings Entertainment is merging with **Draw Another Circle** and **Hendrix Acquisition Corp.**, two companies owned by Joel Weinshanker, who is president and sole shareholder of National Entertainment Collectibles Association (NECA). NECA owns 12% of Hastings' stock and is a major vendor to Hastings.

MIXING LICENSING AND SPONSORSHIP

Manchester United is renewing its licensing and sponsorship agreement with **Nike** to the tune of about \$1 billion over a 10-year period. According to published reports, Manchester United's previous 13-year deal with Nike, which runs through the end of the 2014-2015 season, was valued at between one-third and one-half that amount. The deal covers all retail, merchandising, apparel, and product licensing; player uniforms; and sponsorship. A co-branded sponsorship-licensing agreement with **Chevrolet**, **Nike**, and **Manchester United** revs up next season as well and is projected to bring in an additional \$88 million to the team, which gives some context to NBA Commissioner Adam Silver's recent comment that sponsor logos on NBA player jerseys are "inevitable" and likely over the next five years. A few days prior to that comment this month, the **WNBA** show cased jerseys with the **Mayo Clinic**.

A SPADE GROWS IN U.S.

Kate Spade executives hope to quadruple retail sales for the heavily licensed handbag label to \$4 billion, according *Bloomberg*

News. The piece details the brand's ever-changing ownership history, brand expansion to date, and future ambitions. Currently, 75% of sales of Kate Spade-branded goods occur in the U.S.

LI & FUNG SETS STAGE FOR BRANDS BUSINESS SPIN-OFF

Li & Fung is preparing a possible spin-off of its global brands and licensing business on the Hong Kong Stock Exchange later this year. President/CEO Bruce Rockowitz acknowledges that the brands business "has gone through a difficult time" but that with the portfolio it has built up—and it's acquisition of licensing agency **The Licensing Company** earlier this year—"we hope to make sure that the things that went wrong in the past don't go wrong in the future. It is more volatile, but it's a higher-margin business."

WWE, MATTEL SLAM ON

"**WWE Slam City**" is the sports entertainment company's new online-only animated series, developed with **Mattel's** Playground Productions. Twenty-six shorts, each two minutes long, feature animated **WWE** personalities out

of their element and with new career options. The show will air on **WWEslamCity.com**, **Mattel.com**, the Cartoonium channel on YouTube, and other popular video streaming services in the U.S., Canada, and the U.K. Slam City licensed toys and toy accessories are also available at retailers nationwide. **WWE** and **Warner Bros.** recently joined forces for a **WWE** and **Scooby-Doo** cross-over animated film.

DRIVE THIS

Ferrari is licensing private equity firms **Investindustrial** and **KKR** to build a nearly 81,000-square-foot Ferrari Land park at PortAventura, a resort in Salou, Spain. The park will include what is touted as the fastest vertical accelerator in Europe, a Ferrari-themed hotel, and other Ferrari-themed attractions. The first Ferrari park, Ferrari World, opened in 2010 in the UAE.

SYNDICATED WALK

AMC's "**The Walking Dead**," already a popular licensed property, will get an added boost this fall when two back-to-back episodes are broadcast one night a week on MyNetworkTV stations. MyNetworkTV is a broadcast service owned by **21st Century Fox**. "**The Walking Dead**" is the No. 1 cable drama series of all time, according to the network, and the No. 1 broadcast and cable series among adults 18-49.

THAT'S A LOT OF MOJANG

"**Minecraft**" maker **Mojang** posted a 38% increase in revenue, to 2.07 billion kronor, or around \$325 million USD, for 2013, and an increase in profit from \$51 million to \$128 million. The company's preliminary report to *The Wall Street Journal* (government filings are due later this month) attributes roughly 7% of revenue to sales of the company's "**Scrolls**" game and **Minecraft** merchandise sales combined.

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Average Royalty Rates

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continues to rise. “Royalties are negotiable,” says one survey respondent, whose average year-on-year royalty rate stayed even with the previous year, “but increasingly they are associated with added fees.” (See below regarding added fees.)

Guarantees Don't Fare as Well

In contrast to royalties, guarantees declined, with almost half of respondents (48%) reporting declines in average guarantees. Reported decreases in dollar value of the average guarantee range from 5% to 75%. Another 38% of survey participants report flat guarantees, on average, while 14% say their average guarantees rose during the year.

AVERAGE ROYALTY RATE AND RANGE OF ROYALTIES, BY PROPERTY TYPE, 2012-2013				
PROPERTY TYPE	RETAIL SALES, 2013	RETAIL SALES, 2012	CHANGE, 2012-2013	SHARE OF MARKET, 2013
Art	6.30%	6.31%	-0.1%	4%-23%
<i>Art and Artists</i>	6.43%	6.44%	-0.1%	4%-23%
<i>Museums</i>	6.18%	6.19%	-0.2%	4%-20%
Celebrities	10.31%	10.23%	0.8%	3%-18%
<i>Entertainers/Models</i>	10.44%	10.35%	0.9%	4%-16%
<i>Chefs/Home-Related</i>	9.74%	9.66%	0.8%	2%-18%
Collegiate	9.97%	9.92%	0.5%	5%-18%
Entertainment/Character	9.43%	9.32%	1.2%	4%-25%
Estates	9.70%	9.72%	-0.2%	4%-20%
Fashion	8.46%	8.43%	0.3%	2%-16%
<i>Apparel</i>	8.37%	8.34%	0.3%	5%-16%
<i>Footwear</i>	7.13%	7.12%	0.1%	2%-14%
<i>Home</i>	7.46%	7.46%	0.0%	2%-14%
Music	8.26%	8.24%	0.2%	4%-25%
Nonprofit	8.34%	8.37%	-0.3%	4%-16%
Publishing	8.68%	8.70%	-0.2%	2%-18%
<i>Books</i>	7.96%	7.98%	-0.2%	6%-14%
<i>Newspapers/Magazines</i>	8.15%	8.13%	0.2%	2%-12%
<i>Comic Books/Strips</i>	9.60%	9.63%	-0.3%	5%-18%
Sports	9.98%	9.93%	0.5%	5%-18%
Trademarks/Brands	7.78%	7.82%	-0.5%	1%-20%
<i>Automotive/Motor Vehicle</i>	4.09%	4.10%	-0.3%	1%-16%
<i>Food/Beverage</i>	5.53%	5.51%	0.3%	1%-10%
<i>Restaurants</i>	5.91%	5.90%	0.2%	4%-8%
<i>Sporting Goods</i>	7.01%	7.01%	0.0%	6%-14%
Traditional Toys/Games	8.16%	8.21%	-0.6%	5%-18%
Video Games/Interactive/Online	8.91%	8.95%	-0.5%	6%-18%
OVERALL AVERAGE	8.67%	8.66%	0.1%	1%-25%

SOURCE: THE LICENSING LETTER

Advances were mostly flat as a percentage of guarantees but down, on average, when measured in dollars, since they are typically tied to guarantee amounts. Still, advances did not decline as much, on average, as guarantees, and fewer participants report declines in advances as report declines in guarantees. As one respondent notes, advances are usually not a big point of contention in contract negotiations; royalties and guarantees are much more critical.

That said, 41% of survey respondents say advances were down in 2013 (with most citing declines in the 10%-to-15% range, compared to 2012). Just 4% report advances being up, while 55% say average advances were flat, year on year.

Advances and guarantees were down, on average, across property types and product categories, according

AVERAGE ROYALTY RATE AND RANGE OF ROYALTIES, BY PRODUCT CATEGORY, 2012-2013				
PRODUCT CATEGORY	AVERAGE ROYALTY, 2013	AVERAGE ROYALTY, 2012	PERCENT CHANGE, 2012-2013	RANGE OF ROYALTIES, 2013
Accessories	9.12%	9.11%	0.1%	3%-18%
<i>Eyewear</i>	8.23%	8.21%	0.3%	5%-16%
<i>Handbags, Backpacks, Messenger Bags</i>	8.90%	8.90%	0.0%	5%-18%
<i>Headwear</i>	9.76%	9.71%	0.5%	7%-14%
<i>Hosiery</i>	8.59%	8.61%	-0.2%	5%-14%
<i>Jewelry and Watches</i>	7.73%	7.72%	0.1%	3%-18%
<i>Luggage and Travel Accessories</i>	10.15%	10.18%	-0.3%	5%-18%
<i>Scarves and Ties</i>	7.33%	7.34%	-0.1%	5%-14%
Apparel	9.44%	9.33%	1.2%	5%-20%
Consumer Electronics	5.25%	5.21%	0.8%	3%-18%
Domestics	8.85%	8.89%	-0.5%	4%-14%
Food/Beverages	5.93%	5.87%	1.1%	1%-12%
Footwear	8.19%	8.13%	0.7%	3%-16%
Furniture/Home Furnishings	7.51%	7.53%	-0.2%	3%-14%
Gifts/Novelties	8.76%	8.81%	-0.6%	4%-18%
HBA	8.99%	8.91%	0.9%	5%-14%
<i>Fragrance</i>	9.29%	9.22%	0.8%	5%-18%
<i>Cosmetics, Hair Accessories, Other</i>	8.43%	8.35%	0.9%	6%-14%
Housewares	6.28%	6.29%	-0.2%	3%-14%
Infant Products	8.70%	8.70%	0.0%	5%-14%
Publishing	9.73%	9.78%	-0.5%	5%-15%
Sporting Goods	9.81%	9.81%	0.0%	4%-16%
Stationery/Paper	9.09%	9.14%	-0.6%	4%-15%
Toys/Games	10.37%	10.39%	-0.2%	5%-20%
Video Games/Software	10.41%	10.45%	-0.4%	1%-20%
OVERALL AVERAGE	8.67%	8.66%	0.1%	1%-25%

SOURCE: THE LICENSING LETTER

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Average Royalty Rates

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to respondents. Entertainment/character was down the least—with increases for some Disney deals moderating decreases for most other properties—and art the most. Several respondents working in the art sector report paying or receiving no advances or guarantees during the year.

On the category side, similarly, nearly all experienced declining guarantees and advances, with the toy category declining the most, followed by home décor, and food performing the best, with average guarantees and advances flat compared to 2012.

Marketing Requirements Common

More than half (52%) of those responding to the survey question on whether they pay into or require a contribution to a central marketing fund (CMF) say they did, with 6% specifying that they did so “rarely” or “sometimes.”

Meanwhile, 44% of survey participants note that they are required to commit a percentage of annual wholesale or net sales to their own advertising or marketing of the license (or require such a contribution).

A sign of how CMFs and other marketing requirements are growing: Of those saying they did not pay into a CMF or have a required marketing contribution, several phrased their answer as “not yet.”

It should be noted that these figures are likely higher than is actually the case for the licensing business as a whole. This is, perhaps, because the respondents who answered the questions about marketing contributions were skewed toward property types where such requirements are more common, such as corporate trademarks,

fashion, sports, and, increasingly, entertainment/character. (The latter is especially true when the major studios are involved; a few respondents note that Lucas has started requiring CMF contributions now that Disney owns it.)

Those involved in other property types, where marketing requirements are less common—especially art—may have skipped this section of the survey.

About a third (34%) of participants report their average CMF contribution in 2013 was 1% of net sales, while 33% report an average contribution of 2% of net sales. For annual marketing commitments, respondents report a range of 1% to 10% (of either net sales or wholesale), with the most commonly reported amounts (cited by 48% of respondents) being in the 2%-to-5% range.

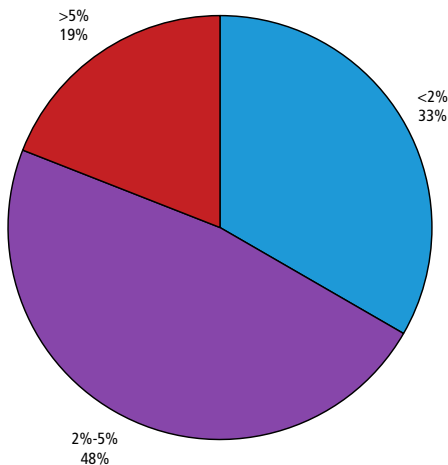
Several participants note that they were required to contribute through both marketing mechanisms, that is, they had to make a CMF contribution on top of committing a percentage of net sales to their own marketing spend to support the licensed line.

Other licensee marketing contributions cited by survey respondents—sometimes in combination with one or both of the above—include requirements to:

- ▶ Participate in trade shows and consumer exhibitions;
- ▶ Market their products in licensor-controlled venues such as magazines or product boxes;
- ▶ Spend a certain amount on showroom displays and trade ads targeting retailers;
- ▶ Commit to representing the product line in catalogs and web pages; and
- ▶ Devote funds to retail co-op advertising and retail point-of-sale materials.

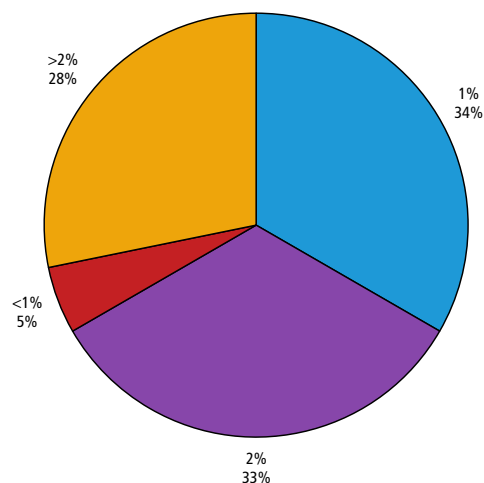
For the first time since the survey has been conducted, several respondents note that they were required or

AVERAGE REQUIRED COMMITMENT TO LICENSEE ADVERTISING, AS A PERCENTAGE OF NET OR WHOLESALE SALES, 2013 (EXCLUDES THOSE NOT REPORTING A COMMITMENT)



SOURCE: THE LICENSING LETTER

AVERAGE CONTRIBUTION TO CENTRAL MARKETING FUND, AS PERCENTAGE OF NET SALES, 2013 (AMONG THOSE CONTRIBUTING TO CMF)



SOURCE: THE LICENSING LETTER

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Average Royalty Rates

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encouraged to spend more and/or be more active on social media and viral marketing.

International Insights

While the numbers discussed here focus on the U.S. and Canadian markets only, international trends were similar, with respondents in territories outside the U.S. and Canada reporting royalty rates, on average, consistent with those in the U.S. and Canadian market—although some emerging markets demand lower rates—and also overwhelmingly reporting steady royalty levels in 2013 compared to 2012.

Similarly the trend internationally was for advances and guarantees to fall year-on-year, as was the case in the U.S. and Canada. Guarantees, as measured in dollars, tend to be smaller globally than in the U.S. and Canada, due to smaller populations and often less-established licensing markets,

which combine to result in much lower sales forecasts and thus lower guarantee levels.

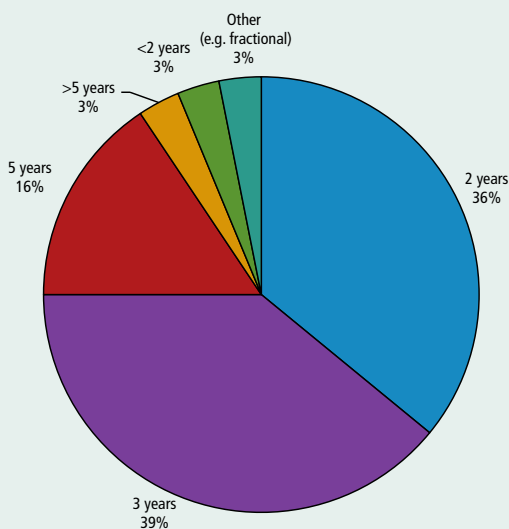
In general, respondents reporting rising average royalties in 2013 tended to be in Southeast Asia, South Korea, and especially China. Those reporting lower royalties and those reporting the largest drops in average guarantee levels were most likely to be in Europe, especially southern Europe, or Japan. These results align with the overall performance of those markets when it comes to retail sales of licensed merchandise.

CONTRACTS STEADY AT TWO TO THREE YEARS

Contract lengths were, on average, steady from the previous year, with more than three-quarters (77%) of respondents saying so, versus 13% saying the average length increased and 12% saying it decreased. The largest percentage of respondents (39%) say their average contracts were three years, followed closely by those who say the average was two years (36%). Another 16% report their average contracts were five years in length; most of these tended to be in the fashion or corporate trademark sectors.

Some respondents specified that their three-year contracts included two years of selling and one year of product development. Others noted that the length of their renewal contracts declined, generally from three to two years.

AVERAGE LENGTH OF NEW LICENSING AGREEMENTS, 2013



SOURCE: THE LICENSING LETTER

Who's News

Seth Horowitz is promoted to COO at Iconix; **Jeff Lupinacci** is appointed CFO; and **Rodney Hutton** joins as EVP of the Men's Division. Horowitz had been president of the Men's Division, prior to which he was president of retailer Modell's Sporting Goods. Lupinacci comes to Iconix having served as global CFO at IPG Mediabands, the media holding company of Interpublic Group. Hutton was most recently chief merchandising officer for Anne Klein Brands.

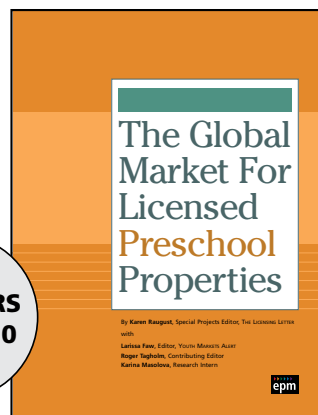
Jodi Gottlieb is promoted to SVP at CopCorp Licensing, while also joining CopCorp/TK Brand Group joint venture Knockout Licensing as SVP.

Jameel Spencer joins Sequential Brands Group as CMO, a new position. Spencer will also continue to work with clients Shawn Carter Enterprises and Sean "Diddy" Combs under his own agency, Brand Matter, a Sequential subsidiary that's under license to Spencer.

Alita Friedman exits Uglydoll to form her own marketing/licensing/PR consulting agency. Contact her at info@alitafriedman.com.

Tim Juckes joins Saban Brands as sales director of U.K. products in London. Juckes joins Saban after 17 years at CPLG.

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Licensing News

Properties Available Or Recently Assigned, U.S.

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Chris Farley	Late comedy actor known for his time on Saturday Night Live and movies like Tommy Boy and Black Sheep.	All	David Reeder, Reeder Brand Management
Good Sign	Series of signs reading "This Is a Good Sign," now featured on college notebooks.	All	Morgan A. Ward, Kitsch Cache
Komaneko	Character from Domo creator Tsuneo Goda and featured in short film, Komaneko: The First Step.	All	Richard Maryyanek, Big Tent Entertainment
Sandy Lloyd	Artist and illustrator known for mixed-media collages.	All	Lance Klass, Porterfield's Fine Art Licensing
Tentacle Kitty	Social expressions brand featuring a cat with tentacles.	All	Morgan A. Ward, Kitsch Cache
Thomas Edison's Secret Lab	Children's science-focused animated series currently in the pilot stages.	All	Amy Moynihan Heyward, Genius Brands
Veria Living	Health and wellness brand/television network.	Apparel, biometrics, exercise equipment, food, HBA	Sid Kaufman, N.S. Bienstock

Licenses Recently Granted, U.S.

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
300: Rise of an Empire	Changes	T-shirts	Warner Bros. Consumer Products
	Treco Sportswear	Print-on-demand T-shirts	
Adventure Time	Aquarius Entertainment Merchandising	Playing cards, puzzles, tins	Cartoon Network Enterprises
	Briarpatch*	Card games	
	Cryptozoic Entertainment	Statues	
	Factory Entertainment	Collectible figures	
USAopoly*	Co-branded board game		
American Horror Story	Trends Intl.	Posters	20th Century Fox Consumer Products
ASPCA	Vans	Footwear	ASPCA
Betty Boop	Myplash	Prepaid credit cards	King Features Syndicate
Cake Boss Junior	Meyer Corp.	Baking and cooking supplies	Discovery Communications
Chris Madden	Sunham Home Fashions	Rugs, shower curtains, towels	Earthbound
Colonial Williamsburg	Robert Abbey	Lamps	Colonial Williamsburg Foundation
DC Comics Super Heroes	Hanna Andersson	Sleepwear	Warner Bros. Consumer Products
Divergent	CafePress	Custom on-demand products	Striker Entertainment
Doodle Jump	Crayola	Art accessories, art kits	Lima Sky
Dumb Ways to Die	Underground Toys	Plush	Evolution
Elf on the Shelf	Candyrific	Candy accessories, candy dispensers	CCA and B dba Elf on the Shelf
Epicurious	Tabletops Unlimited	Bakeware, cookware, housewares, kitchen accessories	FremantleMedia Enterprises
Ford	Stern Pinball*	Pinball machines	Global Icons
Ghostbusters	Marshmallow Fun	Marshmallow shooters, toys	Sony Pictures Consumer Products
Guardians of the Galaxy	Silver Buffalo*	Drinkware	Disney Consumer Products
	Vandor*	Drinkware	
Hexbug	BioWorld Merchandising	Apparel	Innovation First
HillBilly Brand	Real Brands	Bottled drinks	Trademarking Resources
Isaac Mizrahi New York	Signal Brands	Luggage, travel accessories	Xcel Brands

*Extension or renewal.

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Licensing News *Continued from page 6*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Kathy Davis	Art Trends dba ATI Industries	Wall decor	Kathy Davis Studios
	Creative Bath Products	Bath ensembles	
	Creative Converting	Party goods	
Kenny Scharf	Ultimate Ears	Headphones	MemBrain Licensing
Legend of Zelda	Dark Horse Comics	Collectible statues	Nintendo of America
Marvel Super Heroes	ICup	Drinking glasses	Disney Consumer Products
	Thermos	Drinkware, food jars, lunch kits	
	Zak Designs	Dinnerware, drinkware, food storage	
Moonpie	Limestone Branch Distillery	Spirits	Lisa Marks Associates (LMA)
Muppets Most Wanted	FunKo	Vinyl figures	Disney Consumer Products
Outdoor Life	High Peak USA	Self-inflatable beds, sleeping bags	Bonnier
	Zyloware Eyewear	Eyewear	
Peter Rabbit	Cardinal Industries	Games, puzzles, tabletop games	Nickelodeon
Power Rangers	JAKKS Pacific*	Halloween accessories, Halloween costumes	Saban Brands
Rio 2	Hallmark Licensing	Greeting cards, ornaments, stationery	20th Century Fox Consumer Products
	JAKKS Pacific	Figures, novelty toys, playsets, plush, role play, toys	
Robert Graham	Batallure Beauty	Fragrances, personal care products	Robert Graham
Saveur	CE North America	Appliances	Bonnier
Sleepy Hollow	Trends Intl.	Calendars, posters	20th Century Fox Consumer Products
SpongeBob SquarePants	NKOK	Remote-controlled vehicles	Nickelodeon
Teenage Mutant Ninja Turtles	Tervis	Drinkware	Nickelodeon
Trisha Yearwood	Cookware Company (The)	Cookware	ACI Licensing
Turner Classic Movies	Razor MD	Shaving supplies	Parham Santana
Veronica Mars	CafePress	Custom products	Warner Bros. Consumer Products
Vikings	BioWorld Merchandising	Accessories	Brandgenuity
	Catalyst Game Labs	Board games	
	Hybrid Apparel	Apparel	
	MjC International Group	Novelties, sleepwear	
	Underground Toys	Collectible replicas	
Wham-O	Nowstalgic Toys	Novelty toys	Synchronicity/Out of the Box
	Precious Tails—Enchante	Pet toys and accessories	
	Wish Factory (The)	Outdoor games, pool accessories, pool toys, water games	
X-Files	IDW Publishing*	Board games	20th Century Fox Consumer Products

International Properties Available or Recently Assigned

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Chupa Chups	Perfetti Van Melle's lollipop brand launched in 1958 with a Salvador Dalí-designed logo.	Apparel, gifts, home textiles, personal care, pet accessories, sporting goods, stationery (China)	Josephine Law, Beanstalk Hong Kong
	Perfetti Van Melle's lollipop brand launched in 1958 with a Salvador Dalí-designed logo.	Apparel, fashion accessories, lifestyle, personal care (Mexico)	Gloria Salazar Mourre, P&L Global Network
	Lollipop brand known for its Salvador Dalí-designed logo.	Apparel, cosmetics, electronics, fashion accessories, stationery, toys (South Korea)	Jason Lee, Infiniss
Elaine Ryan	Licensing program for interior designer, her Elaine Ryan Home Decorating Kit, and her daughter, Lauren Rosenberg.	Accessories, furniture, home decorating kits, paints, soft goods, wallpaper (Worldwide)	Cathy Malatesta, Lawless Entertainment

*Extension or renewal.

Continued on page 8

Licensing News *Continued from page 7*

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Ironman	Triathlon series first founded in 1978 with over 190 worldwide events.	Food/beverage, home electronics, sporting goods (Worldwide)	Jeff Lotman, Global Icons
Lolirock	Marathon Media's children's show for girls ages 5-10, launching later this year on France 3.	All except publishing and home video (France)	Geraint Marsh, francetv distribution
Mia and Me	Rainbow, March, and Lucky Punch's girls brand, with season two set for airing soon.	Apparel, games, home and decorative accessories, stationery, toys (Benelux)	Daphne Kellerman, License Connection
Singer	163-year old sewing machine brand.	Crafting, fabric care, home tools/appliances, knitting, quilting (Worldwide)	Carole Postal, Knockout Licensing
Sonic the Hedgehog	Video game character featured in over 20 years of games, including the upcoming Sonic Boom game and TV series.	All including apparel, accessories (Portugal, Angola, Cape Verde, Guinea Bissau, Equatorial Guinea, Mozambique, São Tomé e Príncipe, East Timor)	Alice Durand, Popcorn Brand Activity
	Video game character featured in over 20 years of games, including the upcoming Sonic Boom game and TV series.	All including apparel, accessories (Spain, Andorra)	Ruben Gil, Enjoy Brand Licensing
Swashbuckle	Live action pirate show for children airing on CBeebies network.	All (U.K.)	Martin Lowde, Brands With Influence (B.W.I.)
Virgin Galactic	Commercial space travel company.	All (North America)	Ross Misher, Brand Central
	Commercial space travel company.	All (Worldwide except North America)	Gabrielle Sims, Fluid World Ltd.
WikiLeaks	International organization known for publishing high-profile news leaks. Editor-in-chief/founder Julian Assange also available for licensing.	Accessories, apparel, housewares, paper goods (Worldwide)	Olafur V Sigurvinsson, WikiLicense

International Licenses Recently Granted

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Amazing Spider-Man 2	Character World/TDS Enterprises*	Bedding (U.K.)	Disney Consumer Products
Betty Boop	Fashion Lab	Accessories, apparel (U.K.)	Allsorts Licensing
Blinky Bill	Headstart International	Master toy (Worldwide)	Merchantwise Pty.
Candy Crush Saga	Skybrands	Apparel (Europe)	King
Garfield	Brand International	Footwear, slippers (U.K.)	Bulldog Licensing
Hello Kitty	Lakeland	Kitchen accessories, party accessories (U.K.)	Fluid World Ltd.
	Pet Brands	Pet accessories (U.K.)	
Matt Hatter Chronicles	GB Eye Ltd.	Novelty gifts, posters (U.K.)	ITV Studios Global Entertainment
	Hy-Pro International	Bicycles, scooters, skateboards, skates (U.K.)	
Moshi Monsters	Click Distribution	Kitchen utensils (U.K.)	Mind Candy
One Direction	Sambro Intl.*	Bags, stationery (U.K.)	Global Merchandising Services (U.S.A.)
Popeye	Bunkerbound	Giftware (U.K.)	Allsorts Licensing
Power Rangers	Rubie's Costume*	Halloween costumes (Europe, Middle East, Africa, Australia, New Zealand)	Saban Brands
Rio 2	DecoPac	Cake decorating kits, cake toppers, candles (U.S., Canada)	20th Century Fox Consumer Products
	Extreme Concepts dba Bentex	Sleepwear, sportswear, swimwear (U.S., China)	
	Jay Franco & Sons	Bath accessories, bedding (U.S., Canada)	
Star Trek	Gary Gurmukh Sales	Apparel, giftware, headwear (Canada)	CBS Consumer Products
Valentina Ramos	My Gifts Trade	Home fragrance, mugs, stationery (U.K.)	Meiklejohn Graphics Licensing (MGL)
Victoria and Albert Museum	Graham & Brown	Wallpaper (U.K.)	V&A (Victoria & Albert Museum)
YU-GI-OH!	Just Funky	Blankets, crackers, glassware, lamps, pillows, ponchos, shower curtains, throws, towels, wall art (North America)	4K Media

*Extension or renewal.



contacts & connections

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Continued on page 10

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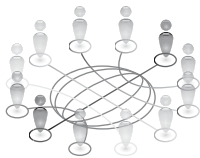
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Licensed Products Distribution

Continued from page 1

(82%) cite dollar stores as among their fastest-growing channels, as do a similar proportion for club and outlet stores. “We see more categories of strong national brands going into the membership warehouse channel, and the same is true of the dollar channel, where most brands would not have wanted to appear just five years ago,” says one agent specializing in corporate trademark licensing. “Now, the dollar stores are an important component in many distribution strategies.”

Mass/discount chains also saw their share rise, from 31.7% to 31.8%. While that translates to relative growth of only 0.3%, it is significant in dollar terms, since this channel has by far the largest share of market of any distribution tier. A strong majority of respondents (61%) saw their share in discount/mass stores rise, while another 26% saw sales hold steady in this channel. Only 13% report declines.

Meanwhile, higher-end luxury stores, most of which are included either in the department or specialty store segments in this survey, continued to grow, according to

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Licensed Products Distribution

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respondents, although the pace was somewhat less than in recent years.

Specialty Share Up Slightly

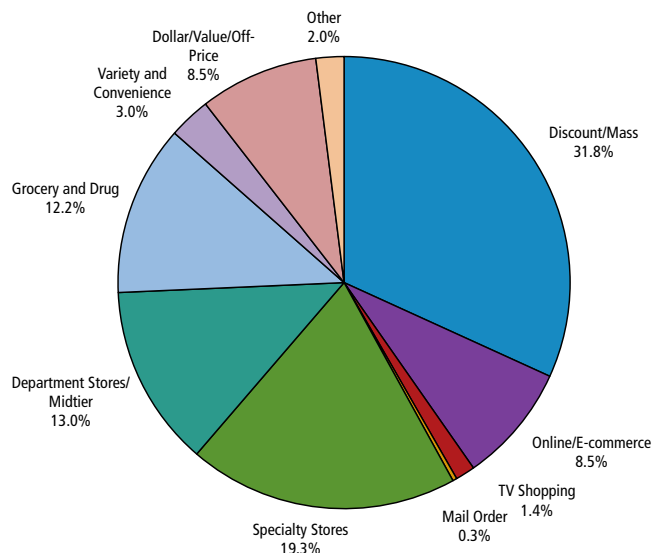
Specialty stores' increase in share, from 19.2% to 19.3%, was driven in part by the luxury tier. Individual survey respondents' fortunes varied in this channel, however. Unlike the lower-price tiers, where respondents overwhelmingly say their businesses grew, a relatively small 43% report this tier as one of their fastest growing in 2013, with 33% reporting weakness and 24% reporting flat results.

In addition to luxury, another bright segment within the specialty channel, according to respondents, consisted of outdoors and sports retailers (e.g., Cabela's, Dick's, and Bass Pro). These retailers carry many of the products that survey participants mention as doing well in 2013, including outdoor sports-related trademarks such as Remington and Field & Stream, camouflage-patterned goods, made-in-America items, workwear, and outdoorsy entertainment-based properties such as Duck Dynasty and Duck Commander.

Fast-fashion retailers such as H&M, Zara, and Forever 21 comprise another strong sector within the specialty tier in the U.S. and Canada (as well as abroad), while toy stores and book stores saw their fortunes move in the opposite direction, according to survey participants.

Grocery and drug stores have seen their share rise of late, and that continued in 2013. Grocery/drug's share of retail sales of licensed products increased from 12.1% to 12.2% that year, with 46% of survey respondents citing this sector as one of their fastest growing and 38% seeing it stay even with 2012, versus just 16% reporting it as weak.

SHARE OF MARKET OF RETAIL SALES OF LICENSED MERCHANDISE, BY DISTRIBUTION CHANNEL, 2013



SOURCE: THE LICENSING LETTER

The department store/midtier channel's share, meanwhile, fell from 13.2% to 13.0%. Respondents, on balance, saw growth in the higher-end department stores, as noted, while midtier stores—where JCPenney, Sears, and Kohl's all saw total sales decline—continued to show weakness. All told, 44% of respondents report department/midtier department stores as among the tiers declining the most in 2013, versus 34% reporting strong and 23% flat results.

E-commerce on the Rise

E-commerce saw its share rise from 8% to 8.5%, a change of 6.3%, with virtually all survey respondents citing this channel as among their fastest growing, including through Amazon.com, their own or their retail customers' e-commerce sites, or customization sites such as CaféPress.

"Flash sales sites have become increasingly important for licensors and licensees, providing promotional exposure and sales opportunities," an agent says. "In 2013, we saw mobile purchasing become a major factor in global shopping, and technology that allows marketers to truly target and customize is here and being tested. Look for potential privacy issues as consumers are targeted, tracked, and studied without permission."

Not surprisingly, the e-commerce channel was particularly important for those properties and products that have the toughest time securing retail shelf space. "Amazon taking the 'long tail' of licensed properties is a major plus, as brick-and-mortars remained very conservative and stayed faithful to evergreen properties (although that may be running its course)," one respondent notes. "Brick-and-mortar seemed to shy away from licensed products compared to years past, or at least remained extremely conservative in terms of the properties they committed to."

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REPRESENTATIVE RETAIL STORES BY DISTRIBUTION CHANNEL

Mass/Discount/Club/Big Box

BJ's, Costco, Kmart, Sam's, Target, Toys "R" Us, Walmart

Specialty Stores

Ace Hardware, Barnes & Noble, Bass Pro, Bed Bath & Beyond, Best Buy, Cabela's, Cracker Barrel, Dick's, Forever 21, GameStop, H&M, Home Depot, Limited, Lowe's, Michaels, Modell's, museum stores, PetSmart, Sherwin-Williams, Sports Authority, Staples, Zara

Department Stores & Midtier

Bloomingdale's, Dillard's, JCPenney, Kohl's, Macy's, Neiman-Marcus, Sears

Online/E-commerce

Amazon, Café Press, Gilt, Zappos, Zazzle

Grocery and Drug

Ahold, Aldi, CVS Caremark, Giant Eagle, Kroger, Meijer, Publix, Rite Aid, Safeway, ShopRite, Walgreen

Dollar/Value/Off-Price

Amazing Savings, Big Lots, Dollar General, Family Dollar, Ross Stores, Save Mart, Supervalu, TJ Maxx

Variety and Convenience

7-Eleven, Circle-K

TV Shopping

HSN, QVC, ShopHQ

Mail Order

Oriental Trading, Signals

Other

Kiosks, on-site, vending, more

Licensed Products Distribution

Continued from page 11

Some respondents see the negative impact of e-commerce channels on bricks-and-mortar retail due to “showrooming,” with affected categories ranging from electronics to housewares.

In some cases, a focus on e-commerce went hand-in-hand with a move away from licensing. “Continued soft retail sales made it increasingly difficult for properties that don’t have nationwide recognition to get onto shelves,” says one respondent. “We have found it more effective to reach our customers by beginning to source and import our own products and sell via a webstore.”

Even as e-commerce continued to grow over the year, both mail order and TV shopping saw their shares decline significantly. Mail order’s decline of 25%, from a 0.4% to 0.3% share, was not a shock, as e-commerce has largely replaced shopping by mail, and virtually all players would be considered “multichannel” today.

The decline in the share for TV shopping was somewhat surprising, however, given the abundance of licensing activity on QVC and HSN. But many of these programs are limited editions, and any dollar growth in sales was dwarfed by the dollar growth in other, larger tiers, notably value and mass, resulting in a decline in share for this channel.

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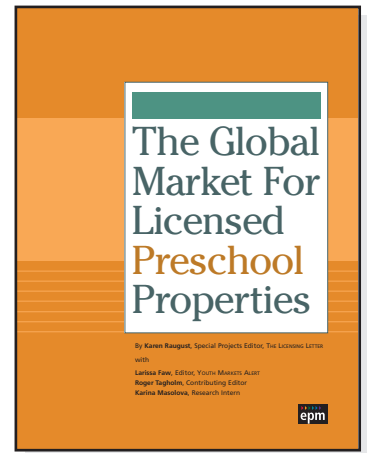
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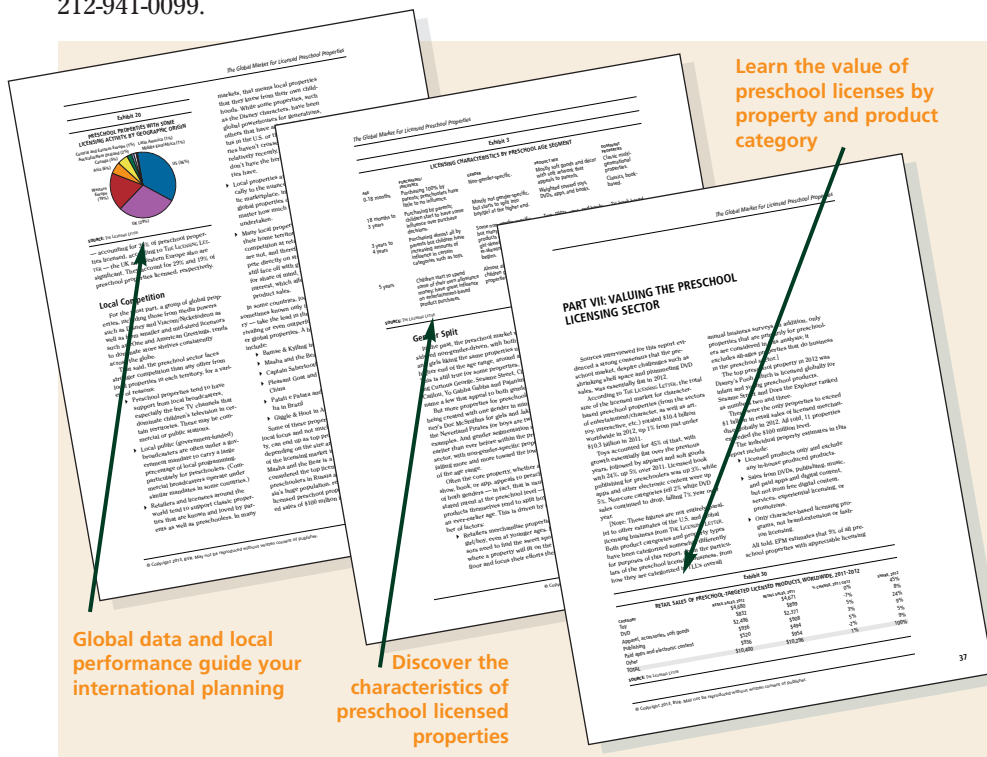
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THE GLOBAL MARKET FOR LICENSED PRESCHOOL PROPERTIES

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- Benjamin the Elephant
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- 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
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- Waybuloo
- The Wiggles
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