

TLL THE LICENSING LETTER

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TLL Survey: Apparel Drives 2.8% Increase in Retail Sales of Sports-Licensed Merchandise in 2013

Retail sales of sports-licensed merchandise in the U.S. and Canada rose 2.8% in 2013, to more than \$13.4 billion, from \$13.0 billion in 2012, according to the just-released *TLL Sports Licensing Report*. The rate of increase was slightly more than in 2012, when retail sales of sports-licensed merchandise grew 2.2%, and also slightly more than the 2.2% growth for licensed merchandise as a whole in 2013.

Of the major sports licensing entities, *TLL* estimates Major League Soccer saw the greatest increase, 13.5%, in 2013. Its recent growth has been fueled by a number of factors, including the increased popularity of soccer in the U.S., the rising number of MLS teams (two began playing in 2011, making 19 teams, and New York City and Orlando will start play in 2015), and the rising fan base for the league itself (average live attendance exceeds that of the NBA and NHL).

The National Hockey League, rebounding strongly from a lockout-shortened season the previous year, saw substantial growth as well, with retail sales rising 10.6%, according to *TLL*. Fan anger that built up during the September 2012-to-January 2013 lockout seemed to dissipate quickly, and sales recovered quickly as well.

The National Basketball Association also had a strong year in 2013, seeing an estimated rise of 6.5% in the U.S. and Canada, according to *TLL* estimates.

Meanwhile, Major League Baseball and the National Football League both grew very slightly in 2013, by an estimated 0.9% and 1.8%, respectively. They continue to dominate the market, however, combining for a share of more than 46% of total retail sales of sports-licensed goods.

On the down side, NASCAR continued to see its sales fall. It has not yet been able to come back from the decreases it started seeing several years ago as its TV ratings and race-day attendance began to fall.

It should be noted that the major leagues' own estimates often vary from *TLL's* measurements. The leagues typically calculate sales based on their fiscal years, which parallel their seasons, while *TLL's* figures are based on a calendar year. In addition, the leagues do not publicly release financial data about their licensing activities, and, while most are willing to discuss trends in the market, they share few numerical details about their business in interviews. Their licensees are among the respondents to *TLL's* survey, however.

"Other" sports properties, outside the major leagues, saw growth of more than 17% in 2013. This growth was propelled by:

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SURTEX

To License or to Sell, That Is the Artists' Question

Walking the aisles at Surtex, the surface textile design show that is co-located with the National Stationery Show, and Gift>it and Creative & Lifestyle Arts shows at the Javits Center in New York City last month, is to see some wonderfully creative artists' work. Most is traditional drawn art but with some photography, and Surtex itself divides its exhibitors (as it has the last couple of years) into those who license and those who sell.

That distinction is increasingly a sore point for the licensing community exhibiting there. Officially, the licensing agents and artists exhibiting in the licensing area that we spoke with said they don't sell their images, "but I know others do." And, in fact, a few admit, off the record, that it's obviously a good deal and maybe they should be doing so, at least at the right price.

Jack Appleman, of agency Art Licensing, says his company won't sell images—despite

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➡ Licensing Ledger



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TRACKING DISNEY'S MERCH GROWTH

On the heels of double-digit increases in operating income across all divisions for the company's fiscal second quarter, and the highest quarterly earnings per share (\$1.08) in the company's history, **Disney CFO** Jay Rasulo lauded Consumer Products head Bob Chapek at the Moffett Nathanson Media & Communications Summit in New York City for the success of Chapek's reorganization of the CP division.

Under Chapek, the unit focuses on franchises rather than product categories. Rasulo also credited Chapek for initiating a new period of double-digit growth. Consumer products revenues (which include the retail stores as well as merchandise) increased 16% for the quarter, to \$885 million, and segment operating income increased 37%, to \$274 million.

In 2011, the company similarly reported that the division had sustained more than a decade of double-digit growth, though direct comparisons are difficult as Disney has regularly changed what it defines as falling under consumer products and related designations often over some 50 years.

Some of the current growth can be attributed to the acquisitions of Marvel and Star Wars and the development of new properties under Disney Junior.

"I need people waking up everyday focused on nothing but a major franchise of the company and what we can do with it," Rasulo said, paraphrasing Chapek, and as reported in *Home Media* magazine.

Disney attributes the improved performance in its merchandise licensing business, which it does not break out, to Disney Channel, Mickey and Minnie, and Planes.

GLOBAL SNACKING

TGI Friday's is extending its deal license with **Inventure Foods** through 2014. The new agreement covers geographic expansion (to Canada, Mexico, Belize, Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua, Panama, China, Taiwan, Japan, Philippines, United Kingdom, the European Union, Australia, New Zealand, and Saudi Arabia) and new snack categories (including popcorn, corn snacks, snack mixes, and tortilla chips).

DIFFERENT RETAIL STROKES

While **Sears's** Eddie Lampert says there will be more store closings at Sears and **Kmart** (the company has closed more than 500 locations since 2005) and that the retailer will be reducing the space it devotes to apparel, "Kmart will continue to roll out

personality-based and social media-oriented lines like those dedicated to Adam Levine and Nicki Minaj within its soft lines offering," he tells *WWD*.

Meanwhile, **Kohl's** says it pushed too hard into private label. CEO Kevin Mansell's outline for growing the company, revealed in conjunction with the retailer's quarterly results, are new beauty departments and more national brands. Exactly what that means for licensing, which has been a cornerstone of the Kohl's strategy, was not defined.

HARDWARE SHOW

"Will **Ningbo Gemay Industry's** Ford-branded tools fix a Buick?" asks **Seltzer Licensing Group's** Stu Seltzer, attending the Hardware Show in Las Vegas. (**Global Icons** represents **Ford**.) Joe Namath was a

significant presence for **EvenPURE's** Namath-branded rapid cooker and his eponymous Namath Steaks. Seltzer's own client, **Scotts Miracle-Gro**, was on hand with a licensed garden hose via **Swan** and lawn and garden gloves manufactured by **West Chester Protective Gear**.

NINTENDO FIGURINE PLATFORM

Featured in **Nintendo's** fiscal-year earnings (which saw a \$228 million loss) are the company's plans to further expand its character/IP licensing. The Nintendo Figurine Platform is the company's official name for a Skylanders-like approach designed to be used with several unspecified Nintendo 3DS and Wii U games. Players will be able to buy figures (from an unspecified licensee) and alter game play by scanning the figures on the Wii U controller or with a separate 3DS peripheral. Nintendo also announced its entry into the mobile app ecosystem with a Mario Kart TV app.

AMAZON'S COMMINGLING

Amazon's commingling of "like" goods from multiple sources can lead to sales of counterfeit goods, licensed and otherwise. While sometimes there are authorized third-party distributors selling the same goods on the site that Amazon obtains from the manufacturer, other times the goods are knockoffs, according to *The Wall Street Journal*. The story details complaints from companies including **Kennedy International**, which makes licensed **Woolite**-branded bra-wash bags.

JIMMY DEAN GETS HUNGRY

Hillshire Brands is acquiring **Pinnacle Foods**, which includes Duncan Hines, Wish-Bone, Armour, Birds Eye, Hungry-Man, Aunt Jemima, and other brands. Hillshire's core brands include Jimmy Dean and Ballpark, among others.

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Sports-Licensed Merchandise

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- ▶ An increase in the number of regional and smaller properties entering or expanding their licensing activities;
- ▶ Expansion in certain sports sectors, such as global soccer teams doing more business in the U.S. and Canada; and
- ▶ More licensing activity on the part of individual athletes, from major league sports names and their lifestyle brands (e.g., Cam Newton at Belk) to the plethora of Olympians launching small merchandise programs, often as a part of greater promotional ties with corporate sponsors.

With no Olympics or World Cup during the year—anticipation for the 2014 Sochi Olympics and 2014 World Cup in Brazil had little impact in the U.S. and Canada—event licensing was not much of a factor in 2013.

Although there were many bright spots in sports licensing in the last year, and a number of survey respondents and executives interviewed were bullish about the sports licensing business, it remains a difficult landscape for many.

“The marketplace is incredibly challenged,” said one licensor. “Retail is extremely difficult right now. Getting the message across is difficult enough for other brands, and licensing is a smaller-margin business for retailers. So getting your fair share and even doing the same as last year is more difficult than ever.”

Apparel Innovation Drives Market

In terms of product categories, apparel was the strongest sector across sports licensing, rising at more than double the pace of the sports business as a whole with an increase of 7.3% in 2013, compared to 2012. This growth was propelled by a number of factors including:

- ▶ Ongoing product segmentation, with continued strength in merchandise developed and marketed specifically for women;
- ▶ Innovation in manufacturing, leading to desirable new pockets of apparel such as athletic performance wear;
- ▶ The strength of brands, from Nike to Reebok to Majestic to New Era, which help drive purchases when combined with sports team logos; and
- ▶ A continued focus on fashion-forward designs that appeal both to the casual fan making fashion-driven purchases and to the core fan who wants to show his or her pride but look good doing so.

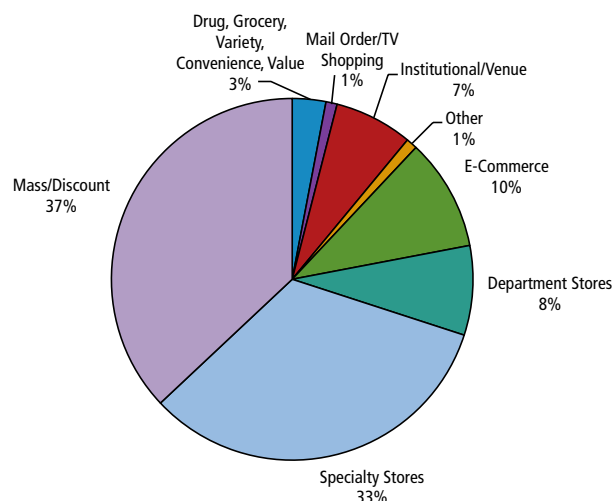
The women’s sector, which has been a growth driver for at least 10 years, continues to thrive. Major League Baseball reports ongoing success with licensees including Victoria’s Secret/PINK, Fifth & Ocean, Antigua, and others, while the NBA this year is launching a global Forever 21 x NBA Collection encompassing dresses, shorts, and tank tops supplied by Mighty Fine and Unk, to name just two examples.

The women’s fashion focus affects all the leagues. “The NFL is our most lucrative license,” reported one survey respondent, “and their marketing in fashion magazines like *Vogue* and *Marie Claire* has been a huge trend.”

The women’s sector is evolving, however. While it started with fashion-forward items for females who may have been just casual fans, licensors and licensees report that the market is focusing more on female fans now. “It’s not just about fashion,” says one licensor. “Women are fans. Their avidity rivals that of any man. They want an authentic jersey, but with the right fit.”

Young girls are an emerging focus for the leagues and other sports entities, with one licensor comparing that sector to the women’s space a decade ago. Major League Baseball has a cross-licensing program with Hello Kitty, with one key purpose of the venture being to gain entry into the

RETAIL SALES OF LICENSED SPORTS MERCHANDISE, BY DISTRIBUTION CHANNEL, U.S. AND CANADA, 2013
TOTAL = \$13.44 BILLION



SOURCE: THE LICENSING LETTER

RETAIL SALES OF LICENSED SPORTS MERCHANDISE, U.S. AND CANADA 2012-2013, BY LEAGUE
(IN MILLIONS)

PRODUCT CATEGORY	RETAIL SALES, 2013	RETAIL SALES, 2012	CHANGE, 2012-2013	SHARE OF SPORTS LICENSING, 2013
Major League Baseball	\$3,212	\$3,182	0.9%	23.9%
National Football League	\$3,128	\$3,072	1.8%	23.3%
National Basketball Association	\$2,195	\$2,060	6.5%	16.3%
NASCAR (teams & drivers)	\$820	\$864	-5.0%	6.1%
National Hockey League	\$933	\$844	10.6%	6.9%
PGA Tour	\$321	\$306	4.8%	2.4%
Major League Soccer	\$487	\$429	13.5%	3.6%
Other	\$2,342	\$2,314	1.2%	17.4%
TOTAL	\$13,437	\$13,071	2.8%	100.0%

SOURCE: THE LICENSING LETTER

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Sports-Licensed Merchandise

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young girls' market, a relatively new area for the league.

Outside of apparel, other key growth categories during the year included accessories (up 5.2%, driven in part by strong headwear sales, from caps to winter knitted hats), sporting goods (up 4.5%, driven by core products such as basketballs), and consumer electronics (up 4.2%).

Interactive games remain an important category for sports licensing. The business is struggling as distribution transitions from physical to digital and more fans come into the market wanting inexpensive casual games rather than core console product. But the sports sector declined less than licensed games as a whole in 2013, down 5.4% for sports versus 7.4% across all property types.

Events and Hot Markets

Over the last few years, licensors have increased their focus on "hot markets," including:

- ▶ Merchandise tied to off-field athletic activities, such as batting practice jerseys from MLB.
- ▶ Products tied to tentpole events, such as knit and fleece hats for the NHL's annual outdoor Winter Classic. That franchise has been successful enough for the NHL to launch a Stadium Series, which includes events similar to the Winter Classic, but including warmer climates. Each game has its own brand identity and associated merchandise.
- ▶ Special uniform designs, tied to events or specific games, or simply for alternative use by the teams. Examples include the NBA's creation of short-sleeved jerseys for 10 teams that played on Christmas Day, as well as special jerseys for five other teams this season.

COLLEGIATE LICENSING EXPANDS TO SMALLER SCHOOLS

Many observers include collegiate licensing as part of the sports licensing market, since sports is a key driver of collegiate merchandise sales and the major leagues share many of their licensees with colleges and universities.

TLL separates collegiate licensing from sports licensing, however, since some sales of collegiate merchandise are driven by the loyalty of students, alumni, and campus neighbors, independent of sports team performance.

That said, TLL estimates that, in 2013, retail sales of licensed merchandise based on colleges and universities totaled \$3.43 billion, up 1.8% from \$3.37 billion in 2012. Collegiate Licensing Co. (CLC), a division of IMG College, which represents about 75% of the collegiate licensing market, estimates the size of the collegiate business overall at \$4.59 billion in 2013.

Some of that growth is coming from the entrance of small- to medium-sized colleges, along with larger institutions in smaller consumer markets; while individual programs are still small, in the aggregate, they are helping propel the market forward. In addition, several institutions have changed athletic conferences in the last couple of years, which tends to drive sales. And, as always, sports championships drive sales in certain markets.

RETAIL SALES OF SPORTS-LICENSED MERCHANDISE, 2012-2013, BY PRODUCT CATEGORY (IN MILLIONS)

PRODUCT CATEGORY	RETAIL SALES, 2013	RETAIL SALES, 2012	CHANGE, 2012-2013	SHARE OF MARKET, 2013
Accessories	\$1,039	\$988	5.2%	7.7%
Apparel	\$5,467	\$5,095	7.3%	40.7%
Consumer Electronics	\$323	\$310	4.2%	2.4%
Domestics	\$208	\$216	-3.7%	1.5%
Food/Beverages	\$364	\$357	1.9%	2.7%
Footwear	\$638	\$621	2.8%	4.7%
Furniture/Home Furnishings	\$224	\$232	-3.6%	1.7%
Gifts/Novelties	\$966	\$1,029	-6.1%	7.2%
HBA	\$210	\$207	1.4%	1.6%
Housewares	\$194	\$203	-4.5%	1.4%
Infant Products	\$283	\$279	1.5%	2.1%
Publishing	\$234	\$251	-6.9%	1.7%
Sporting Goods	\$521	\$498	4.5%	3.9%
Stationery/Paper	\$89	\$96	-7.4%	0.7%
Toys/Games	\$643	\$645	-0.4%	4.8%
Video Games/Software	\$1,562	\$1,651	-5.4%	11.6%
Other	\$473	\$393	20.4%	3.5%
TOTAL	\$13,438	\$13,071	2.8%	100.0%

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

SOURCE: THE LICENSING LETTER

Other instances of opportunities for special merchandise include quotes that come up during games or in interviews; spontaneous on-field, on-court, or on-ice happenings that spur merchandise designs; or even something in an athlete's personal life, as awareness of behind-the-scenes activities spreads through Twitter, Pinterest, and Instagram.

"Championships still are big market drivers," says one licensor, "but major storylines can also drive sales."

Some of the factors playing into the growth in such opportunities include the quest to create fresh merchandise and spur ongoing fan interest, the growing capability to create merchandise that can be customized and/or brought to market quickly, and the ability to reach a viable target audience for niche programs, often through e-commerce.

Retail Development

Sports licensors are working closely with their retailers to create experiences in the store to drive traffic and merchandise sales. "Retailers in all tiers are more innovative in creating an entertainment backdrop for retailing, increasing one-to-one communication with their customer, and creating a more engaging environment," says one executive, adding, "Sports is perfect for that."

The NHL did a test of shop-in-shop superstores at Dick's in Chicago, New York City, and Pittsburgh that combined video and other "retailtainment" aspects as well as an array of merchandise. The venture generated a strong sales lift,

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Licensing News

Properties Available Or Recently Assigned, U.S.

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Deer Little Forest	New preschool character brand being developed for licensing, publishing, and TV.	All	David Wollos, Think Tank Emporium
Dog for Dog	Dog food company with philanthropic endeavors supporting canine health.	Pet products	Tim Rothwell, All-American Licensing & Management Group (AALMG)
Flame Boy vs. Wet Willy	1990s character brands featured on skateboards, apparel, footwear, and more.	All	Jim Rippin, Licensing Management Intl.
Francisco Ceron	Colombian visual artist known for bold and extravagant colors.	Accessories, apparel, back-to-school, furniture, home decor, housewares, social expression, textiles	Sandra Louchard, P&L Branding
Gas Monkey Garage	Classic car restoration garage featured on Discovery's Fast N' Loud.	Accessories, apparel, auto accessories, gifts, home goods, lottery, slot machines	Rachel Humiston, Brandgenuity
It's Happy Bunny	Jim Benton's publishing property featured in everything from stickers to anti-drug marketing campaigns.	All	Russell Binder, Striker Entertainment
King Kong of Skull Island	Joe DeVito's book set in the same universe as the original King Kong story.	All	Larry Seidman, Dimensional Branding Group (DBG)
Lovi & Dovi	Character brand about two amorous and inseparable characters.	Apparel, master toy	Stacey Reiner, Remarkable Brands
Surf Ratz	Surf/character brand based on the surf scene of North Cornwall, England.	Accessories, apparel, games, surf/swim, toys	Jim Rippin, Licensing Management Intl.
UndieBabies	Inoochi's cast of bizarre animal characters pretending to be super heroes.	Gifts, T-shirts, toys	Stacey Reiner, Remarkable Brands

Licenses Recently Granted, U.S.

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Aliens	Diamond Select Toys & Collectibles	Bottle openers	20th Century Fox Consumer Products
Amazing Spider-Man 2 (The)	Diamond Select Toys & Collectibles	Collectible busts	Disney Consumer Products
Angry Birds	Mrs. Fields Famous Brands	Cookies	Rovio Entertainment
Back to the Future	FunKo	Collectible figures	Universal Studios Partnerships & Licensing
Bag Snob	Artisan House	Handbags	Beanstalk
Biosilk, CHI	Fetch ... For Cool Pets!	Pet care	Farouk Systems
Bonnie Marcus	MjC Intl. Group	Pajamas	HAP Consulting
Boppy	Global Design Concepts	Diaper bags	Brandgenuity
Carhartt	New Holland Brewing	Beer	Carhartt
Cynthia Rowley	Belk	Bedding, decor, tabletop	ACI Licensing
EVE: Online	Quantum Mechanics/QMx	Collectible model	CCP Games
Gas Monkey Garage	Concept One Accessories	Accessories, headwear	Brandgenuity
	Fifth Sun	Apparel	
	H3 Sportgear	Headwear	
Godzilla	Diamond Select Toys & Collectibles	Collectible bust bank, collectible figures	Toho Co.
Joe Murray	Leanin' Tree	Greeting cards	Montage Licensing

Continued on page 6

Licensing News *Continued from page 5*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Kathy Davis	C.R. Gibson	Gift items	Kathy Davis Studios
	Checks in the Mail	Check accessories, checks	
	Demdaco*	Gift items, home decor	
	Madison Park Group*	Stationery	
	Westminster Fibers*	Fabrics	
	Whitmor*	Home goods	
Laura Ashley	Best Accessory Group	Body wash, lip gloss, lotion, nail polish, soap	Laura Ashley
	Morgan Home/Notra Trading	Beach products, kitchen products	Synergy Licensing
Laurel Burch	Sun 'N' Sand	Mugs, scarves, totes	Laurel Burch Inspirations
	Westland Giftware	Home decor, tabletop items	
Maleficent	MAC Cosmetics	Cosmetics	Disney Consumer Products
Minions	Accessory Innovations	Accessories	Universal Studios Partnerships & Licensing
Miracle-Gro	TTI Group	Outdoor power tools	Seltzer Licensing Group
	West Chester Protective Gear	Garden gloves, lawn gloves	
National Geographic	PetSmart	Pet accessories, pet care	National Geographic Society
Penny Dreadful	Bif Bang Pow!	Action figures, tarot cards	CBS Consumer Products
Plants vs. Zombies	Diamond Select Toys & Collectibles	Collectible bank	Electronic Arts
		Collectible kitchenware	Nickelodeon & Viacom Consumer Products
Pulp Fiction	Diamond Select Toys & Collectibles	Collectibles	Evolution
Simpsons (The)	Johnny Cupcakes	Apparel	20th Century Fox Consumer Products
	MAC Cosmetics	Cosmetics	
SpongeBob SquarePants	Loudmouth Golf	Golf apparel	Nickelodeon & Viacom Consumer Products
Star Trek	Diamond Select Toys & Collectibles	Role play	CBS Consumer Products
Surf Sharks	VenDynamics	Cards, stickers	Surf Sharks
Teenage Mutant Ninja Turtles	C-Preme	Bicycle accessories	Nickelodeon & Viacom Consumer Products
Wolf	Hamilton Beach	Small kitchen appliances	Sub Zero

International Properties Available or Recently Assigned

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
British Motor Heritage	Classic British car company; owns vintage brands like MG, Austin, Morris, and Rover.	All (Nordics)	Anna Rosmalm, Bulls Licensing div. Bulls Press
Uglydoll	Pretty Ugly's cast of odd-looking, colorful monster characters.	All (Brazil)	Signy Valbjorg Sigurthorsdottir, LID-Group

International Licenses Recently Granted

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Beast Quest	Winning Moves Deutschland GmbH	Card games (U.K.)	Coolabi
Care Bears	Brand International Group	Footwear (U.K., Ireland)	Copyright Promotions Licensing Group (CPLG)
	Exact Comercial Exportadora e Importadora	Bean bags, blankets, cushions, dolls, domestics, plush (Brazil)	Exim Licensing
	Posh Paws	Backpacks, bags (U.K., Ireland)	Copyright Promotions Licensing Group (CPLG)

*Extension or renewal.

Continued on page 7

Licensing News *Continued from page 6*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Extreme Sports Company	Vimto dba Nichols	Beverages (U.K.)	Extreme Sports Co.
Gas Monkey Garage	JCorp	Apparel (Canada)	Brandgenuity
LIFE	VMC Accessories	Gloves, headwear, make up bags, scarves, sunglasses, technical accessories, toiletries (U.K.)	Bulldog Licensing
Lotus	Clementoni GmbH Germany	Puzzles (U.K.)	Group Lotus
Monkey	Aykroyd & Sons	Nightwear (U.K.)	Bulldog Licensing
	Poetic Gem	T-shirts (U.K.)	
Peter Rabbit	Paperchase	Gift items, gift wrap, housewares, partyware, stationery, tableware (Europe, Asia)	Silvergate Media
Pink Chillies	B.M. Fashion Ltd. t/a Fashion U.K.	Apparel (U.K.)	Shen Marketing
Plants vs. Zombies	Cookie Company (The)	Gloves, hats, nightwear, scarves, swimwear, T-shirts, underwear (Germany, Austria, Switzerland, France, Belgium, Netherlands, Luxembourg)	Bulldog Licensing
Raleigh	Paladone	Gift items (U.K.)	Raleigh
Sesame Street	Wicked Cool Toys	Seasonal toys (North America)	Sesame Workshop
Strawberry Shortcake	Arcor do Brasil	Gum, sticker books, stickers (Brazil)	Exim Licensing
	Beautifair Development	Back-to-school, backpacks, stationery (France)	Copyright Promotions Licensing Group (CPLG France)
	CIJEP	Cutlery, lunch bags, melamine, water bottles (France)	
	NewBoy FZCO	Dolls, dress-up, ride-ons, role play, toys (Algeria, Bahrain, Egypt, Jordan, Kuwait, Morocco, Oman, Palestine, Qatar, Saudi Arabia, Tunisia, United Arab Emirates, Iraq, Lebanon, Libya, Yemen)	East West Licensing
	Rubies Brasil Com. Fant. Aces.	Halloween accessories, Halloween costumes (Brazil)	Exim Licensing
	Toyster Brinquedos	Board and card games, paint sets, punching bags, puzzles (Brazil)	
Thomas & Friends	Heaven Made Foods	Jellies (U.K.)	HIT Entertainment (U.K.)
Yu-Gi-Oh!	Freeze div. Central Mills	Fashion tops, hoodies, T-shirts (U.S., Canada)	4K Media
	Gruppo Cartorama	Back-to-school, stationery (Italy, San Marin, Vatican City)	

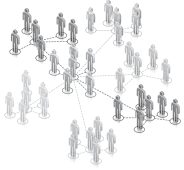
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contacts & connections

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Surtext

Continued from page 1

the pricing pressure and despite the growing use of photography rather than traditional art. “The Corbises of the world will do the \$150 deal,” he says, echoing others’ comments about the competition from photography. Others point out that \$500 to \$1,000 for unlimited use over a specified period is hard to counter.

“Twenty years ago, the first 90 seconds of a cold call by a licensing agent was explaining what licensing is,” says art licensing agent Marty Segelbaum of MHS Licensing. “The second 90 was justifying why they should pay a royalty. Now, they know what licensing is and they’re willing to pay a royalty—that’s the good news. The bad news is ...” and he sweeps his hands around at the show floor and all his and his artists’ competitors.

“There’s a lot of pressure to sell rather than license,” says Appleman. “We say, ‘No.’ But our potential customers will take second tier art that they don’t like as much instead of the first tier that we represent because they can purchase rather than license it.”

Among the other trends and issues surfacing at Surtext:

- ▶ A dramatic increase in the number of requests for high-res images for “tests.” Art Licensing has developed a special agreement covering just that and including penalties for misuse.
- ▶ Rapidly growing interest in print-on-demand for wall-paper and other wall décor. Hewlett-Packard and other smaller service providers (one specializing in fluorescent colors) were among the exhibitors. Amscan similarly had a booth devoted to on-demand production of tableware including paper plates, cups, and napkins.
- ▶ Efforts to transition some of the better-known genre artists to lifestyle brands. For example, Kathy Davis, who is best known for her American Greetings cards (over 1,000 images developed annually by a staff of 25 designers), is expanding into home décor, accessories, and other gift items for the signature Kathy Davis line (in addition to the signature line, Davis has Kathy Davis Scatter Joy—which will have a charitable component—and Portfolio for different channels).
- ▶ Pressure to lower royalties. While our *Royalty Trends Report* pegs the average royalty for art at 6.3%, that encompasses museums and the best-known artists as well as lesser-known artists who are more likely seeking royalties of 4% and often settling for less.
- ▶ More short-term programs—not quite capsule collections, but similar. Jewel Branding & Licensing, for example, did a “limited” edition Oscar de la Renta line based on New York Botanic Gardens images. Generally, though, Segelbaum says, “I used to have three year programs from start to finish. Now, it’s one year—and that’s for things that sell well.”
- ▶ Much emphasis on art built around words. Dominique

Vari, a French artist also repped by Jewel, has a line called “Wild About Words” and independent artist Mary DeArment, exhibiting for the first time, does “Words With Designs ... Designs With Meaning.” There were others.

- ▶ Emphasis on chalkboard typography. There seemed to be a lot of journals, wall décor, and other products using common phrases produced in, for lack of a better term, large turn-of-the century (20th century, that is) saloon signs. This was popular for a while in the 1980s and appears to be returning.
- ▶ Much gold, typically on black, in design and on fabric. It seemed to emanate largely from French and U.K. exhibitors and the “sales” side of the floor but certainly wasn’t limited to them.
- ▶ Similarly, a lot of designs had the look of static-y video images—out of focus or blurry and/or with little lines across the whole design. That’s not much to go on, but we promise when you see it you’ll know what we’re talking about!

On the stationery side of the floor, among the interesting licensed lines:

- ▶ Montreal paper goods company Pierre Belvedere has a line of Cirque du Soleil journals, notepads, bloc-notes, and greeting cards. Cirque is the company’s only license, and, based on its exhibit, the primary focus of the firm.
- ▶ Lifeguard Press, which holds licenses for Kate Spade New York, ban.do, Jonathan Adler, and Lilly Pulitzer, was showing phone cords, chargers, ear buds, and cases, as well as paper clips, push pins, and journals.
- ▶ Ferrari was on view at a number of booths, including Kenro, the U.S. distributor for Schaefer, which is the Ferrari pen licensee, and Ogami, for journals.

Capsule Collections Beyond Fashion

“Marketing initiatives that pay rather than cost.” That’s how Brand Squared Licensing CEO Michael Dresner defined licensing for a Luxury Marketing Council meeting on “The Benefits and Challenges of Brand Licensing” in New York City.

It’s a refrain we’re hearing more and more, particularly as traditional licensing agents increasingly position themselves as brand strategists, one of whose roles is creating new revenue streams through line extensions.

[To that end, Beanstalk recently launched Blueprint—Powered by Beanstalk, a division to formally do what it’s been doing: advising companies on how to evolve their brands, including extension strategies. The division is headed by Nicole Desir.]

We asked three of the panelists at the Luxury Marketing Council meeting, each with expertise in fragrance, furniture and home furnishings, and wine and spirits whether the current spate of capsule collections in the fashion world can translate to other segments.

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Capsule Collections

Continued from page 10

SilkRoute Strategists' Mary Manning, who spent 20 years at Coty, pointed to Isaac Mizrahi and Kleenex and Marc Jacobs and Diet Pepsi working together on short-term campaigns.

Grayson Co.'s Steve Goldberg said there have been pop-up furniture capsule collections. "If it doesn't work, you're not committed long-term," he noted.

And Walmart International's Walter Marcinowski said he works with wine and spirits-makers "testing pop-up shows at casinos with celebrity brands for six weeks. If it works, we roll out. If it doesn't, it's gone."

Marcinowski has one such test going up at Mohegan Sun in Connecticut this summer. "But we've learned: You can't do this with a guarantee up front to celebrities. You have to pay based on what sells. And don't pay an advance—they won't show up for the test."

One product he's also working on with obvious licensing potential: Powdered alcohol. "Kool-Aid-like packs; add water and you have a margarita. We even have K-cups for hot toddies."

Separately:

- ▶ Manning observed that 75% of prestige fragrances are licensed fashion designers—and that 90% of those are men's fragrances. Manning noted that typical fragrance licensing agreements run 10 years, with a 15-year renewal option, "though with celebrities if you have three years you're lucky." The rapid turnover in the celebrity segment, she added, "confuses the consumer."
- ▶ Goldberg said that "TJ Maxx is the largest seller of licensed luggage in the world."

Assessing Millennials' Preference for Private Label

One of the key considerations for getting licensed merchandise onto the shelf is the degree to which it's competing with private label goods—not to mention national brands.

The popularity of private labels has been cyclical over the years; working in their favor at the moment are: perceptions of quality have increased, packaging has improved, and placement on the shelf is often integrated with national and licensed brands, with retailers inviting direct comparison.

From a marketing perspective, now add the 100 million millennials whose shopping habits are defined by a very different growing-up experience, and you have a new world order.

Among the findings in a new Private Label Manufacturers Association study, "The Millennials Are Coming":

- ▶ When a national brand they wish to buy is not available at the shelf, four in 10 choose the store brand, one-third pick a different national brand, and one in

eight look elsewhere for the national brand they initially wanted.

- ▶ Almost four in 10 buy store brands frequently; 71% say value is the main reason they purchase store brands.
- ▶ Half buy more store brands than their parents, and one-third buy fewer national brands than their parents.
- ▶ More than one in four (28%) are very loyal to supermarkets, 26% to drug stores, and 38% to discounters. But 45% are very loyal to online stores.

For the free full report, send an email to research@plma.com.

Who's News

Bill Bromiley is named president of the newly formed Saban Films. Bromiley was chief of acquisitions at RLJ Entertainment. The division looks to sign eight to 10 films annually for day-and-date release theatrically and across digital platforms—and merchandise, no doubt.

Tim Kilpin is promoted to EVP international at Mattel. Since 2011, he has been EVP Global Brands Team—Boys & Girls; prior to that, he was GM/SVP Mattel Brands. Before joining Mattel, he was EVP studio franchise management at Disney.

Lewis Kofsky is named VP international creative & global interactive strategy at Sesame Workshop. Kofsky previously served as director of game services at Playnomics and as partner and executive producer at Curious Pictures.

Stacey Reiner launches Remarkable Brands, a licensing and branding agency. Reiner was most recently with HIT Entertainment, both before and after its acquisition by Mattel. Initial clients for Remarkable are Lovi & Dovi and UndieBabies.

Ted Larkins will head a new Los Angeles office for DHX Media's CPLG, bringing the licensing operation for DHX's Caillou, Yo Gabba Gabba!, Ella the Elephant, and Degraasi to North America. The company will also represent brand and sporting rights for The Michelangelo Collection, Space Invaders, and St Andrews Links.

Juli Boylan and **Lisa Streff** join Dell Furano's music merchandising firm Epic Rights as EVP global strategic partnerships & licensing, and SVP licensing, respectively. Boylan spent 14 years at Sony Consumer Products; Streff was most recently with SMC Entertainment Group and spent eight years at NBC Universal.

Carla Engelbrecht Fisher is named director of product innovation for kids and family at Netflix. She was founder and head of No Crusts Interactive and has worked in the digital sphere for Sesame Workshop, PBS KIDS, and Highlights for Children.

Toy State, a toy manufacturer specializing in radio-controlled vehicles under license from Road Rippers, Hot Wheels, and James Bond 007, is acquiring Nikko (based in Japan and Hong Kong) and Nikko Entertainment (European arm), which hold licenses for vehicles, boats, and flying items for Transformers, Hello Kitty, Fast & Furious, and Angry Birds, among others.

Chinese publisher and printer **Phoenix Media**, a subsidiary of Jiangsu Phoenix Publishing, is acquiring the children's publishing unit of Publications International Ltd. (PIL). PIL's children's publishing operation has over 1,000 titles, many under license from Disney, Nickelodeon, Sesame Workshop, Mattel, and others, as well as digital, audio, and educational products for kids.

Sports-Licensed Merchandise

Continued from page 4

according to the league, and will be expanded in 2014.

The NBA has retail partnerships in the U.S. with Champs and Lids and is rolling out shop-in-shops in 315 Kids Foot Locker locations in 2014 that will feature video game stations, player exhibits, and other facets. And it has seen strong sales in Walmart, the league says; in February of this year, it launched an NBA FIT Food program at that retailer that included stickered oranges, player appearances, and clinics among the components.

Sports licensors also continue to expand their business to new distribution channels; Gap and Old Navy are fresh initiatives for Major League Baseball, for example.

That said, the fastest-growing channel for sales of licensed merchandise is e-commerce. "A greater percentage of licensees' business is being generated via e-commerce, with Fanatics and Amazon being the two most significant retailers in that channel," noted one survey respondent.

E-commerce's share of retail sales of licensed sports merchandise rose from 8% in 2012 to 10% in 2013, according to *TLL* estimates. Most other distribution channels maintained their shares; the exceptions were department stores, as well as mail order and TV shopping.

While this article focuses on sports licensing in the U.S. and Canada, it should be noted that most sports licensors continue to see growth in their global businesses, with rates typically outpacing those in their domestic markets. Many licensors now count a significant portion of global

retail sales coming from markets outside of the U.S. and Canada. The NBA, for example, reports that more than a third of its global retail sales are from overseas; it has been one of the most aggressive U.S.-based sports licensors when it comes to developing its business globally.

THE LICENSING LETTER's all-new Sports Licensing Report has just been released, with extensive detail on league-by-league strategy, best-selling teams and players, and more; see www.epmcom.com/sportslicensing for a complete table of contents and to order.

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PARTNERSHIP MARKETING BRAND, MEDIA & ENTERTAINMENT DIRECTORY

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Major Holding Companies & Their Active Brands

Quickly pinpoint the contacts you need.



Jel Sert
Susie Frausto
VP Marketing
Route 59 and Conde St.
West Chicago, IL 60185
(630) 876-4914

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