

TLL THE LICENSING LETTER

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On the Trail of Innovation: Testing, Technology, & Mega Trends are Expanding Beyond the Licensing Mainstream

The trends affecting the licensing business that were evident on the show floor and in conversations with licensing executives at Licensing Expo in Las Vegas this year were often variations on the themes reported in our first look at 2014 trends back in January.

Here, then, is how the trendscape is shaping up as of mid-year.

1. Testing, Testing, Testing

From limited editions (Diane von Furstenberg at Gap) and capsule collections (Lucky Brand x Mustang), to curated groupings of merchandise (Rachel Zoe at ShoeDazzle), to regional programs and retail exclusives (Adam Levine at Sears), it's all about reducing risk while keeping an eye out for long-term opportunities.

2. Reimagination

The quest continues to put new spins on established properties, creating something that is both fresh and new and less risky at the same time. Examples range from retro and vintage twists on corporate trademarks (à la licensee Junk Food), to relaunches of nostalgic properties (Pac-Man relaunched as a TV series), to collaborations and co-branding pairing artists and fashion designers with characters, sports teams, and corporate brands (Stella McCartney and Malificent).

3. Evolution of Tech

In no time at all, digital-origin properties have moved from mobile apps and virtual worlds such as Cut the Rope and Moshi Monsters to Pinterest and Instagram celebrities such as Bethany Mota; tech-based product categories have evolved from smartphone cases to texting avatars; e-commerce opportunities have expanded from traditional sites such as Amazon or Macys.com to flash sale, aggregation, and/or overstock sites such as Zulily or Birchbox; marketing venues have transitioned from websites to Vine. The only constant is change.

4. Licensing on the Fringes

As true growth areas become scarce, niche and incremental opportunities attract interest. Collegiate licensing moves beyond the highest-profile and most athletically inclined institutions to mid-sized colleges (Ball State) and individual coaches (John Wooden) [see story on page 12]. Pet products transition from general merchandise for cats and dogs to niches such as waste disposal (Animal Planet with Greenberry), waterproofing (Body Glove with Plangea), or gerbils and birds (National Geographic with PetSmart). International licensors look beyond India to Pakistan and Bangladesh.

5. Rise of the Mega Trend

More than ever, key licensing trends extend across multiple property types, product categories, distribution channels, and geographic areas. Examples include health and wellness, which extends from better-for-you foods to gym brands to yoga classes; performance, functionality, and utility, which ranges from antimicrobial clothing to heavy-duty work gloves; and "Americana" (in its broadest sense), which encompasses

Continued on page 11

AND THE WINNER IS...

Emmy-nominated TV Shows Mix POD, Sourced & Licensed Goods

A LICENSING LETTER analysis of the 33 TV shows nominated for five or more Emmy Awards this year, 73% (24) have licensing programs (see table, pg. 3), and most of the others offer some merchandise even if sourced rather than licensed. Two shows on the list originate outside the traditional broadcast/cable world: Netflix's "House of Cards" and "Orange Is the New Black."

Among those shows with no licensing programs are two annual awards specials — The Oscars and Tony Awards — and several one-off

Continued on page 4

Inside This Issue

Back-to-School Spending	2
Comics Sales.....	2
Merchandise Profiles of Emmy-nominated Shows	3
Licensing News	5
STEM Sells	8
Contacts & Connections	9
Who's News.....	11
Smaller, Mid-sized Colleges Expand Licensing Activity	12

in short

A clear generic-design printed 12 oz. tumbler with straw is \$3.99 at Duane Reade (a Walgreens subsidiary) in New York; a 16 oz. New York Yankees tumbler and straw is \$12.99 on the same display.



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Licensing Ledger

DOWN THE UP STAIRCASE

One-third of back-to-school (BTS) shoppers will begin the shopping process less than two weeks prior to school starting, up from 27% who did so last year, according to the **National Retail Federation** and **Prosper Insights & Analytics**. The trade group projects BTS spending (including for college) to be down 11% this year to \$74.9 billion because there are fewer households with students this year than last. However, spending by those households individually will be up 5% for those with children K-12 (\$669.28) and 10% for college households (\$916.48).

COMICS SALES

Comic Stores ordered about \$340 million worth of comic books in 2013, while newsstands ordered some \$25 million, according to **ICV2** and **Comichron**, two comics industry trade news and data sources, as reported by *Publishers Weekly*. Add to that \$90 million in digital comics and graphic novels (comics and graphic novels are lumped together in the digital estimates). Comic stores ordered \$170 million in graphic novels in 2013, while book channels ordered \$245 million. All estimates are calculated based on the full retail price of the books and do not account for markups or discounts.

SWEET TREATS

Krispy Kreme, the donut company, is looking to license candies, cereals, ice cream and cake mixes — items within “the wheelhouse of our brand,” CEO Tony Thompson, who took over earlier this summer, tells *USA Today*. The company has already signed an agreement with **Green Mountain** to launch Krispy Kreme coffees in K-Cup packs for Keurig brewers by the end of 2014. ... Separately **Crumbs**, reported here previously as closing its retail

stores but with licensed products at **BJ's** and **Target**, has been acquired by Marcus Lemonis and **Fischer Enterprises** as part of the company's voluntary Chapter 11 filing.

WHICH TECH DO I WEAR?

If tech-enhanced wearables expand as at least some prognosticators predict, licensed properties will be a natural fit, so to speak. Our own take: This will be a niche business for the foreseeable future, appealing to sports buffs, upscale/competitive parents, health enthusiasts, and so on.

IS MICHAEL KORS OVER-LICENSING?

While designer Michael Kors has been expanding his reach via licensing, fashion industry observer Robin Lewis sees Kors's ubiquity across categories and retail channels to be “the kiss of death.” In his *Robin Report* blog, Lewis compares Kors' path to **Coach**, which he says “is in the middle of its own unraveling, mostly because of its ubiquity. Roughly 70% of its revenues are currently coming from its outlet stores, which gives us more than a hint of its devaluation.”

MARVEL(OUS) CHANGES CONTINUE

First, Thor is introduced as a woman on *The View*. Then **Marvel Comics** announces on *The Colbert Report* that Samuel Wilson, widely thought to be the first Black superhero in mainstream comic books, will be the new Captain America. Who's next and what show(s) will they be on?

ALIENS ON THE WAY TO KOREA

Village Roadshow Theme Parks has been licensed by **Twentieth Century Fox Consumer Products** to create a theme park as part of Korea's Ungdong Entertainment Complex. A Memorandum of

Understanding among Village Roadshow, Twentieth, and the government in Seoul calls for a 75-acre theme park featuring Alien, Ice Age, and Planet of the Apes, among others. A Twentieth theme park for Malaysia was previously announced for an opening in 2016, while the studio is expanding its Springfield USA attraction at Universal Studios Hollywood in 2015.

NO QUARTERS FOR THESE ELMOS

The **Times Square Alliance**, a non-profit business improvement group, counted nine Elmos; seven each Hello Kittys and Mickey Mouses; six Minnie Mouses, and a variety of Spider-Mans, Marios, Minions, Iron Mans, Cookie Monsters, and other costumed characters in Times Square one night. Seventy-six characters in all, each seeking tips for having their pictures taken — some aggressively so. City Councilman Andy King has introduced legislation that would require the characters to be licensed by the city, subject to background checks. There would also be guidelines to avoid what the Alliance terms “aggressive or inappropriate behavior” such as accosting tourists for tips, shoving, and groping, among other offenses.

SESAME ON DISPLAY

Sesame Workshop and **The New York Public Library for the Performing Arts** will mark Sesame Street's 45th anniversary with an exhibit, *Somebody Come and Play: 45 Years of Learning on Sesame Street*, a free multimedia exhibition opening Sept. 18th in NYC. The Library for the Performing Arts will also present film screenings and public programs on puppeteering, scriptwriting, and creating digital media for Sesame Street, and special programming for children and families.



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MERCHANDISE PROFILES OF TV PROGRAMS WITH FIVE OR MORE EMMY NOMINATIONS, 2014

SHOW	NETWORK	NOMINATIONS	LICENSED	REPRESENTATIVE LICENSEES/NOTES	LICENSING CONTACT
Game of Thrones	HBO	19	Yes	More than 60 licensees as of June 2014 including: Ommegang (beer), Concept One (accessories), Funko (vinyl), ThreeA (figures), Delivery Agent (apparel, accessories, novelties, toys/games)	Laura Greenwood, HBO
Fargo	FX	18	Yes	Delivery Agent (apparel, novelties) Limited posters, t-shirts at fxnetworks.com, film and TV merchandise at CafePress show renewed for second season	Roz Nowicki, 20th Century Fox Consumer Products
American Horror Story	FX	17	Yes	Licensing is for series, though each season has its own name, characters, and plotline current edition: Coven. Licensees include: Ripple Junction (apparel, accessories), Trends International (posters, stationery), Delivery Agent (apparel)	Roz Nowicki, 20th Century Fox Consumer Products
Breaking Bad	AMC	16	Yes	Concept One (accessories), Bioworld (apparel), Mezco Toys (collectible toys), Mask-arade (masks)	Greg Economos, Sony Pictures Consumer Products
The Normal Heart	HBO	16	No	One-shot movie, based on a stage play. Unlike most of the other nominees which are series.	Laura Greenwood, HBO
Saturday Night Live	NBC	14	Yes	Trevco (apparel)	Learah Lockhart, Broadway Video
House of Cards	Netflix	13	Yes	Delivery Agent (accessories including "FU" cufflinks)	Russell Binder, Striker Entertainment
Cosmos: A Spacetime Odyssey	Fox/National Geographic	12	Yes	Celestron (Electronics)	David Goodrich, 20th Century Fox Consumer Products
Downton Abbey	PBS	12	Yes	Andover Fabrics (sewing fabric); Heritage Lace (home décor textiles, women's lace accessories); Republic of Tea (tea); Weeks Roses (roses); Wines That Rock (wine); Cryptozoic Entertainment (games); Enesco (gifts, novelties); Fifth Sun (apparel)	Tamra Knepper & Carole Postal, Knockout Licensing
Orange Is the New Black	Netflix	12	Yes	Rasta Imposta (Halloween costumes, accessories)	Russell Binder, Striker Entertainment
Sherlock	PBS	12	Yes	Licensed as a series, with individual seasons having their own titles (current: His Last Vow). Licensees include Dreamtex (bedding)	Carla Peyton, BBC Worldwide North America
True Detective	HBO	12	Yes	Posters, flasks, t-shirts	Laura Greenwood, HBO
Modern Family	ABC	10	Yes	American Classics (apparel), Andrews McMeel Publishing (publishing)	Roz Nowicki, 20th Century Fox Consumer Products
The Voice	NBC	10	Yes	MusicSkins (mobile accessories)	Joni Camacho, NBCU Digital Marketing
Veep	HBO	9	Yes	Posters, buttons, t-shirts	Laura Greenwood, HBO
Mad Men	AMC	7	Yes	Banana Republic (specialty apparel)	Gina Degnan Hughes, AMC Networks
The Oscars	ABC	7	No	N/A	
Anthony Bourdain: Parts Unknown	CNN	7	No	N/A	
The Big Bang Theory	CBS	7	Yes	Commonwealth Toy & Novelty (toys), Cardinal Industries (games), Ripple Junction (apparel), Delivery Agent (apparel, accessories, media, novelties, toys/games)	Elizabeth Kalodner, CBS Consumer Products
Boardwalk Empire	HBO	7	Yes	Ripple Junction (apparel, accessories), Delivery Agent (apparel, accessories, novelties, media)	Josh Goodstadt, HBO
Dancing With The Stars	ABC	7	Yes	Mattel (Barbie dolls), via BBC out of the U.K. CafePress (apparel, novelties, fan-designed merchandise)	Victoria Chew, Disney ABC Television Group
So You Think You Can Dance	FOX	7	No	N/A	Dick Clark Productions

Continued on page 4

Merchandise Profiles of TV Programs With Five or More Emmy Nominations, 2014 (continued from page 3)

SHOW	NETWORK	NOMINATIONS	LICENSED	REPRESENTATIVE LICENSEES/NOTES	LICENSING CONTACT
67th Annual Tony Awards	CBS	7	No	N/A	Tony Award Productions
The Amazing Race	CBS	6	Yes	See www.cbsstore.com	Elizabeth Kalodner, CBS Consumer Products for all except food/beverage: Stu Seltzer, Seltzer Licensing Group
The Beatles: The Night That Changed America	CBS	6	No	N/A	Tom Bennett, Bravado Intl. Group Merchandising Services
The Colbert Report	Comedy Central	6	Yes	Ben & Jerrys (ice cream) Colbert and Daily Show have done special limited programs such as election-themed apparel through Hot Topic in 2012.	Ariel Yarmus, Viacom Music & Entertainment Group
The Daily Show With Jon Stewart	Comedy Central	6	Yes	Warner Books (publishing)	Ariel Yarmus, Viacom Music & Entertainment Group
Portlandia	IFC	6	Yes	T-Line Design (apparel), Ripple Junction (gifts, novelties)	Gina Degnan Hughes, AMC Networks
The Good Wife	CBS	5	Yes	Mitchell Gold and Bob Williams (furniture) Madura (home décor, assorted apparel, accessories, novelties)	Elizabeth Kalodner, CBS Consumer Products
Louie	FX	5	No	Sourced mugs, t-shirts	Roz Nowicki, 20th Century Fox Consumer Products
Masters of Sex	Showtime	5	No	N/A	Mark Kaplan, Sony Licensing
Project Runway	Bravo	5	Yes	Robert Kaufman Fabrics (fabrics), Simplicity Creative Group (quilt supplies)	Andy Cohan, ACI Licensing
Silicon Valley	HBO	5	No	Limited sourced accessories, novelties	Laura Greenwood, HBO

SOURCE: THE LICENSING LETTER

Emmy-nominated TV Shows

Continued from page 1

programs (“The Beatles: The Night That Changed America,” “The Normal Heart”).

Those shows that do have licensing programs tend to be series and, as expected, to be beyond their first seasons. Some, such as “American Horror Story” and “Sherlock,” have different subtitles, plotlines, and sometimes even characters season to season, but the licensing agreements cover the overall title.

Often, for any show that gains traction, CafePress (and to a lesser extent other print-on-demand sites) will be used as a barometer of consumer interest in licensed goods. Network online stores, managed in-house, or by Delivery Agent or other similar services, will be next. The early mix of merchandise will typically be print-on-demand, sourced items, and licensed goods.

Among the licensing programs with the greatest variety of out-of-the-ordinary goods: Downton Abbey (tea, roses, lace) and Game of

Thrones (swords, beer, dragon eggs, was seal coasters).

Of course, licensing is not limited to those shows with five or more Emmy nominations, and many shows with no nominations this year have active licensing programs. Overall, the trajectory as described above is the same.

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licensing news

PROPERTIES AVAILABLE OR RECENTLY ASSIGNED

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Billy Green Builds!	Preschool series co-produced with Little Airplane Productions about a seven-year-old traveling the world to help animals.	All	Deana Duffek, SeaWorld Parks & Entertainment
Boston University	Boston-based private university known for its Terriers team.	All	Cory Moss, Collegiate Licensing Co. (CLC)
Cult (The)	British rock band known for songs like "She Sells Sanctuary" and "Rain."	All	Lisa Streff, Epic Rights
Drybar	Hair care chain with 37 worldwide locations.	HBA, home decor, kids products	Ross Misher, Brand Central
East Carolina University	Public, Greenville-based university known for its PeeDee the Pirate mascot and Pirates sports teams.	All	Cory Moss, Collegiate Licensing Co. (CLC)
Elmer The Patchwork Elephant	Book series by David McKee currently celebrating its 25th anniversary.	Apparel, crafts, housewares, juvenile products, stationery	Joel Barnett, Brentwood Licensing
Fisher	Audio electronics brand.	Car audio, dash cams, DVD/Blu-ray, electronics accessories, headphones, home audio, netbooks, phones, portable audio, security cameras, tablets, televisions	Alan Kravetz, Leveraged Marketing Corp. of America (LMCA)
Grambling State University	Grambling, Louisiana university known for its Tigers Division 1 team.	All	Cory Moss, Collegiate Licensing Co. (CLC)
Highlights	Highlights for Children, publisher of popular U.S. children's magazine.	All	John Leonhardt, Dimensional Branding Group (DBG)
King Kong	Primate character featured in the classic films. New art by artist Joe Devito and endorsed by the Merian C. Cooper estate.	All	
Larry Gets Lost	Series of 18 children's books in print for over 10 years.	All	Larry Seidman, Dimensional Branding Group (DBG)
Ted Nugent	Guitarist known for his solo output and The Amboy Dukes.	All	Lisa Streff, Epic Rights
Trane	Subsidiary of Ingersoll Rand and HVAC brand.	Home ventilation, portable AC, portable air purifiers, portable dehumidifiers, portable humidifiers, sump pumps	Alan Kravetz, Leveraged Marketing Corp. of America (LMCA)
University of Pittsburgh	University founded in 1787 and known for its Division 1 Panthers team (and Roc the Panther).	All	Cory Moss, Collegiate Licensing Co. (CLC)
University of Virginia	Public university in Charlottesville featuring the Division 1 Cavaliers.	All	
Vanderbilt University	Private, Nashville-based university with the Commodores team based in NCAA Division 1, as well as teams in the Southeastern and Big East conferences.	All	
Yonaguni	Children's action comedy series about a group of underwater animals.	All	Deana Duffek, SeaWorld Parks & Entertainment

*Extension or renewal.

Continued on page 6

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LICENSES RECENTLY GRANTED, U.S.

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Adventure Time	Vandor	Drinkware	Cartoon Network Enterprises
Alien	National Entertainment Collectibles Association (NECA)	Collectible statues	20th Century Fox Consumer Products
American Kennel Club	HouseWares Intl.	Pet feed products	4Licensing Corp. div. 4Kids Entertainment
Batman: Arkham Origins	Square Enix*	Collectible figure	Warner Bros. Consumer Products
Big Bang Theory (The)	Tonner Doll	Dolls	Warner Bros. Consumer Products
Buffy the Vampire Slayer	Titan Publishing/Titan Entertainment	Collectible figures	20th Century Fox Consumer Products
Chipwich, MoonPie	Smart Planet	Bake pans, cups, kitchen electrics	Lisa Marks Associates (LMA)
Dawn of the Planet of the Apes	National Entertainment Collectibles Association (NECA)*	Action figures, collectibles, statues, t-shirts	20th Century Fox Consumer Products
DC Comics	Mattel*	Master toy	Warner Bros. Consumer Products
Disney's Planes: Fire & Rescue	Huffy*	Outdoor accessories	Disney Consumer Products
	Mattel*	Toys	
	Thinkway Toys*	Toys	
Dodge	BrownTrout Publishers	Calendars	Licensing Company (The)
	GreenLight*	Collectible replicas	
	Innovative Designs	Back-to-school	
	MBI Publishing	Coffee table book	
	Open Road Brands	Signs	
Dragon Age	Titan Publishing/Titan Entertainment	Collectible figures	Electronic Arts
Escape From New York	FunKo	Action figures	Creative Licensing Corp. (CLC)
Fifth Harmony	Accessory Innovations	Accessories	Sony Music Entertainment
	BrownTrout Publishers	Posters	
Firefly	Quantum Mechanics/QMx*	Collectibles	20th Century Fox Consumer Products
	Quantum Mechanics/QMx*	Collectibles	
Frozen	Candyrific*	Candy dispensers	Disney Consumer Products
God Of War	FunKo	Vinyl figures	Dimensional Branding Group (DBG)
Goonies	FunKo	Vinyl figures	Warner Bros. Consumer Products
Halo	National Entertainment Collectibles Association (NECA)*	Figures, games, replicas	343 Industries Microsoft
	Skullcandy	Audio accessories, electronics	
	Square Enix*	Collectible figure	
KISS	Bif Bang Pow!	Action figures, collectibles, drinkware, license plate frames, stationery, totes	Epic Rights
	Figures Toy Company	Collectible figures	
	K'NEX Brands	Construction figures, construction toys	
Little Critter	Kohl's	Books	Infinity Licensing
Loudmouth Golf	iZone Group	Sunglasses	Brand Liaison (The)

*Extension or renewal.

Continued on page 7

licensing news *Continued from page 6*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Marvel	Her Universe/The Araca Group	Apparel (women's)	Disney Consumer Products
Marvel Super Heroes	C-Preme	Helmets	
Peppa Pig	Accessory Innovations	Backpacks, bags, cold weather accessories, headwear, hosiery, luggage, lunch kits	Entertainment One
	Character World/TDS Enterprises	Bedding, home accessories	
	Komar Sleepwear	Sleepwear	
Pulp Fiction	FunKo*	Vinyl figures	Evolution
Quiksilver	E. Gluck	Watches	Quiksilver
Rocky	National Entertainment Collectibles Association (NECA)	Collectible figures	20th Century Fox Consumer Products
Self	London Luxury	Bath, bedding, personal care products	FremantleMedia
Simpsons (The)	Kidrobot*	Collectible figures	20th Century Fox Consumer Products
Smarties, Warheads	Active Apparel	Dorm pants, t-shirts	Lisa Marks Associates (LMA)
Star Trek	Quantum Mechanics/QMx*	Collectibles	CBS Consumer Products
Star Wars	Quantum Mechanics/QMx*	Collectibles	Disney Consumer Products
Teenage Mutant Ninja Turtles	Build-A-Bear Workshop	Plush	Nickelodeon & Viacom Consumer Products
Thaneeya's Sugar Skulls	Ceaco	Puzzles	Infinity Licensing
Three Stooges (classic)	Pariplay	Casino games	C3 Entertainment
Twinkle Toes	JAKKS Pacific	Doll accessories	Skechers U.S.A.
U.S. Army	Party Animal	Action figures	Beanstalk
Walking Dead (The)	McFarlane Toys*	Construction toys	Striker Entertainment
Wizard of Oz (The)	Gund	Co-branded plush	Warner Bros. Consumer Products
	Gund*	Co-branded plush	Pretty Ugly
World of Eric Carle	Kids Preferred	Preschool toys	Joester Loria Group
WWE	World Tech Toys	Radio-controlled vehicles	World Wrestling Entertainment (WWE)

INTERNATIONAL PROPERTIES AVAILABLE OR RECENTLY ASSIGNED

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Cloudbabies	Pre-school property from HoHo Entertainment. Will broadcast on ARD and ZDF in the region.	All (Germany, Austria, Switzerland)	Anita van Esch, Active Merchandising
Doug Hyde	U.K. artist known for artwork, prints, and heavily-attended art shows.	All (U.K.)	Alicia Davenport, DRI Licensing Ltd.
Katarina Sokolova	Computer graphics artist with an art education based in the Ukraine.	Calendars, greeting cards, jigsaw puzzles, posters, stationery (Worldwide)	Adam Meiklejohn, Meiklejohn Graphics Licensing (MGL)
Lily & Val	Valerie McKeehan's art brand based around whimsical lettering.	All (Worldwide except North America)	
Tip The Mouse	Children's program based on books by Italian author Andrea Dami.	All (Benelux)	Daphne Kellerman, License Connection
Tootsie Rollers	Vintage-looking U.K. girl band.	Apparel, hair accessories, HBA, homewares (U.K.)	Paul Comben, Game Of 2 Halves

*Extension or renewal.

Continued on page 8

INTERNATIONAL LICENSES RECENTLY GRANTED

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Beano (The)	British Library	Greeting cards, screen print (U.K.)	DC Thomson
Doodle Jump	Egmont (U.K.)	Activity books, sticker books (Worldwide)	Tinderbox div. Beanstalk (U.K.)
Frozen	Character World/TDS Enterprises*	Bedding, bedding accessories (U.K.)	Disney Consumer Products
Ghostbusters	Kellytoy	Co-branded soft toys (U.S., Canada)	Sony Pictures Consumer Products
LIFE	Portico Designs	Gift items, stationery (U.K.)	Bulldog Licensing
Matt Hatter Chronicles	H&A	Personal care (U.K., Ireland)	ITV Studios Global Entertainment
Quiksilver	Northwest Co. (The)	Beach accessories, beach towels (North America, South America, Central America)	Quiksilver
	PS Brands/Planet Sox	Socks (North America)	
Roxy	Parigi Group	Apparel (children's), apparel (girls'), apparel (infants') (U.S., Canada, Puerto Rico)	
Sherlock	Dreamtex	Bedding, bedding accessories (U.K.)	BBC Worldwide
Slugterra	Panini Verlags GmbH	Publishing, stickers, trading cards (France, Spain, Portugal)	Nerd Corps Entertainment
Tip The Mouse	Panini Verlags GmbH	Magazines (Germany)	License Connection
	Simba Dickie Group	Games, toys (Germany)	
	Vivid Imaginations	Plush (Germany)	
Tired Ted	Yoofiti	Wall art (U.K.)	Bulldog Licensing
Warner Bros. Properties	Party City	Party goods (U.S., Canada)	Warner Bros. Consumer Products
Zoo York	J Fin Group	Earbuds, headphones, mobile accessories (North America)	Iconix Brand Group

STEM Sells

After lots of talk and a small but growing number of examples, Science, Technology, Engineering, and Math (STEM) themes are finally starting to show a noticeable presence in children's programming, as recent announcements demonstrate:

- ▶ Nickelodeon, which has said it was planning to increase the amount of educational content in its programming, introduced *Blaze*, a monster truck-focused show that is billed as the first to offer STEM programming to preschoolers. The network plans to introduce the first licensed merchandise in the spring, following the show's debut this fall. Nickelodeon launched the math-focused *Team Umizoomi* a couple of years ago.
- ▶ Scholastic relaunched *The Magic School Bus*—a classic science-based series that came along well before STEM became a buzzword—as *Magic School Bus 360o*, a new Netflix-distributed series that will be accompanied by live experiences, publishing, and other events and programming. Licensing will ultimately follow.
- ▶ Fox-owned stations and affiliates are debut-

ing a two-hour Saturday morning STEM-themed block of programming called *Xploration Nation* in the fall. It will feature four shows on a variety of scientific disciplines, supplied by Steve Rotfeld Productions. No licensing plans have been announced yet.

- ▶ Genius Brands International is in production on *Thomas Edison's Secret Lab*, with partners Georgia Public Broadcasting and the Edison Innovation Foundation. Plans include apps, a website, toys, games, electronics, and an in-school curriculum; PGS Entertainment is distributing the property outside the U.S. and Canada.

There have been STEM-themed properties in the past, from *Mr. Wizard* to *Bill Nye the Science Guy*, often focused on either science or math rather than an integrated STEM curriculum. This has especially been true on PBS, where examples range from *Cyberchase* to *Sid the Science Kid* to themes within *Sesame Street*.

Licensing activity for STEM-specific programs historically has been limited in scope and/or success. But with the growing interest in STEM and a significant increase in the number of properties available, that may change.



contacts & connections

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

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- American Classics**, David Brown, President, 256-737-9995, david@americanclassics.biz, P. 3.
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Continued on page 10

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On the Trail of Innovation

Continued from page 1

es everything from Duck Dynasty to the growth of Cabela's as a channel for licensed goods.

6. Social Issues: More Than Just Talk

Economics have made it possible for consumers to put their money where their mouth is when it comes to good-for-the-world product purchases. As a result, corporations are increasingly implementing pro-social programs, such as selling merchandise made from recycled trash (e.g., Coca-Cola's EkoCycle program with Will.i.am), refusing to work with unsafe factories in Bangladesh, and making more products locally (as Walmart is doing). These may be small steps, but they are real initiatives that go beyond talk.

7. Cult of Celebrity

Despite fears of oversaturation, celebrity licensing persists. Interior designers (Vern Yip), models (Iman), stylists (Cristina Ehrlich), makeup artists (Bobbi Brown), hair stylists (José Eber), set and costume designers (Janie Bryant), chefs (Jamie Oliver), bakers (Jane Packer), musicians (Pharrell Williams), actors (Matthew McConaughey), actresses (Cameron Diaz), and athletes (Shaquille O'Neal)—not to mention pure reality stars à la the Kardashians—continue to vie for consumer attention and shelf space. The ubiquity of reality TV and gossip venues, coupled with celebrities' desire to extend their careers beyond their current fame, are among the many factors keeping this sector vibrant.

8. Industry Sickness = Licensing Health

Some of the fastest-growing areas of licensing are tied to industries facing severe challenges. Retail (e.g., Hollister and TRU), magazines (Forbes and Real Simple), music (Gwen Stefani and Trisha Yearwood), and restaurants (Pizza Express and Moe's) are key examples. IP owners in these industries had often been vocally against the idea of licensing in the past.

9. Power of Brands

The importance of brands and branding takes many forms, from co-branding (e.g., pairing a sports property such as the National Football League with a strong athleticwear brand such as Nike) to the growing role of branded goods at the expense of private labels around the world, to the rise of corporate licensing in developing markets, such as South Korea and China.

10. Consumers as Creatives

User-generated content is a reality that is here to stay. The licensing community is dealing with

crowdsourcing (e.g., Threadless), personalization sites (CaféPress), open innovation initiatives (with companies such as Genius Crowds), simple contests, monitoring of social media, crowd-funding (Kickstarter), fan fiction (Amazon's Kindle Worlds), and "let's play" videos. They are trying to balance the fan engagement and loyalty that comes from UGC—as well as its role in product development—with the need for IP protection.

11. Distribution: New Niches

Licensors and licensees are experimenting with innovative distribution channels. The trend extends from pairing with retailers not previously known for licensing (e.g. Lane Bryant) to more innovative initiatives such as new home shopping venues (Target's Nate Berkus products for sale on Cougartown), merchandise sales tied to downloadable content (Fireman Sam on Amazon), or pop-up shops on Twitter (Roots' Douglas Coupland collection).

12. It's All About the Experience

Licensors in every territory continue to forge deals outside of traditional retail products as a means of raising awareness, enhancing fans' relationship with a property, and generating revenues. Properties from The Biggest Loser and Angelina Ballerina to Forbes and Julliard have licensed into non-retail sectors such as travel services and licensed destinations; dating services and car washes; online curricula and branded schools; shops, restaurants, and go-kart tracks.

13. Interesting Times for Agents

Licensing agents are reacting to challenging times by offering new services (e.g., PR or digital content), representing both sides of the licensing equation (licensee as well as licensor), brokering as well as representing, carving unique niches of expertise (e.g., specializing in the food category), and consolidating and forging partnerships with each other. New business models offer additional or alternative revenue streams to help agents survive and flourish.

14. Changing Business Models

Limited editions, capsule collections, curation, collaborations, cobranding, user-generated content, and content and experiential licensing are ubiquitous. The lines between promotion and licensing are blurring. Celebrities are taking ownership or executive positions in their licensees' businesses. Many of today's licensing trends require consideration of new and alternative payment methods, contract terms, and business structures.

WHO'S NEWS

Christina Miller is named President/GM of Cartoon Network, Adult Swim and Boomerang. Miller, who was most recently GM of NBA Digital and SVP of Turner Sports Strategy/Marketing/Programming, was previously SVP Cartoon Network Enterprises heading up consumer products.

Divinia Knowles, COO at Mind Candy (which developed Moshi Monsters), assumes the role of president at the company while the board searches for a new CEO. Former CEO Michael Action Smith, who founded the company, relinquishes the CEO role to focus on the creative side of the business.

Stone Newman is appointed President, Global Consumer Products at Genius Brands International. Newman joins GBI from Art + Science International and assumes responsibility for GBI's Baby Genius, Secret Millionaires Club, Stan Lee's Mighty 7, and Thomas Edison's Secret Lab. Newman will also continue to manage licensing programs represented by his former company, including Psycho Bunny, Archie Comics, and others through GBI's wholly owned subsidiary, A Squared Entertainment.

Ken Seiter joins the Toy Industry Association (TIA) as VP Strategic Communications. Seiter was most recently CMO for the Specialty Food Association; prior to that, he held various positions at Kraft.

Smaller and Mid-sized Colleges Expand Licensing Activity

Big universities, especially those that are athletic powerhouses, drive the bulk of collegiate licensing. But, increasingly, smaller and mid-sized colleges are seeing their licensing activity grow. Championship athletic seasons, changes in athletic conferences, and mascot redesigns can be among the factors propelling sales, as can a simple need to meet growing demand for heretofore relatively scarce merchandise.

Some examples from the last couple of years, according to local publications covering these institutions:

- ▶ Marshall University's licensing program has grown, in part due to athletic success and a conference change, with retail sales in 2012-2013 reaching approximately \$6.4 million. The number of licensees and of retail stores carrying Marshall merchandise were at their peak that year, although the high mark in retail sales was in 2006 when the campus was featured in the Warner Bros. film *We Are Marshall*.
- ▶ The University of Tennessee-Chattanooga has seen its royalty income increase over the past four or five years, with a 29% jump in 2012-2013 to a record high. One fast-growing licensee was Team Golf, thanks to a Chattanooga student's win at the U.S. Amateur Championship.
- ▶ Miami-Ohio launched a new website to help

students and other consumers more easily find Red Hawk merchandise by providing information on stores closest to their zip codes. The school also changed the branding on its logo and merchandise to enhance commercial prospects.

- ▶ Ball State has been seeing its merchandising revenue rise, due in part to better promotions and marketing and improved retail distribution—including at Dick's Sporting Goods, Meijer, Walmart, Champs, MC Sports, JC Penney, Finish Line, Walgreens, and TJ Maxx—both near the university's Muncie campus and beyond.

Collegiate Licensing Company (CLC), a division of IMG College, dominates the collegiate field with the schools and collegiate tournaments it represents accounting for an estimated 75% of the total collegiate market, Licensing Resource Group (about 20%) and Strategic Marketing Affiliates (about 3%) tend to represent the smaller and mid-sized colleges discussed here. It should also be noted that some schools, notably Ohio State and University of Southern California, handle their own licensing, accounting for 2% of the market for collegiate merchandise.

TLL estimates the collegiate licensing business to have generated retail sales of \$3.43 billion in the U.S. and Canada in 2013, according to the recently released *TLL Sports Licensing Report*; CLC estimates the business to have been \$4.59 billion.

For more on the report, see www.epmcom.com/sports or call 1-212-941-0099.

TLL Takes A Break

There is only one issue of TLL this month, and this is it. We hope you enjoy a summer break, as well. The next issue will be Sept. 1.

Meantime, if you have new deals to announce, visit www.epmcom.com/licensingnews and post the information for us to be considered for the next available issue.

Cheers,
Ira

TLL

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Film Studios/Production Companies
Home Entertainment
Music Labels
Publishers: Books/Comics
Publishers: Magazines
Publishers: Newspapers
Radio Networks/Syndicators
Sports Leagues & Events
Television
Video Games & Software

SECTION TWO: CONSUMER BRANDS

Apparel & Accessories
Automotive

Beverages: Beer, Wine & Spirits
Beverages: Non-Alcoholic
Consumer Electronics
Eyewear
Financial & Insurance Services
Food, Snacks & Candy
Footwear
Fragrance
Furniture & Home Furnishings
Health & Beauty Aids
Housewares & Home Products
Luggage
Non-Profits, Government & Military
Pet Products
States & Municipalities
Stationery/Paper Goods
Telcos & Mobile Carriers
Toys & Games
Travel

SECTION THREE: RETAILERS

Apparel & Accessory Retailers

Convenience & Drug Stores
E-commerce Retailers
General Retailers
Movie Theaters
Restaurants & Fast Food
Specialty Outlets/Vendors
Supermarkets

SECTION FOUR: ADVERTISING, MARKETING & PROMOTION SERVICES

Agencies
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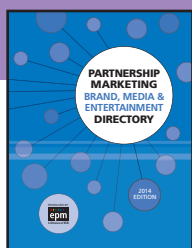
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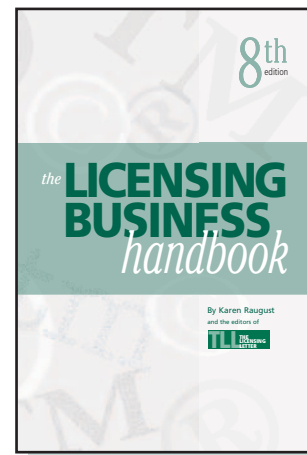
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PARTIAL TABLE OF CONTENTS

Introduction

Part I: How Business Works

What Is Licensing?

Sources Of Licensed Properties

Characteristics Of Major Product Categories

Distribution of Licensed Merchandise

Part II: Licensing Strategies

Strategies For Licensors

Working With Agents

Strategies For Licensees

Part III: The Details

Money Matters

Protecting Your Rights

Contracts

Counterfeiting

International Licensing

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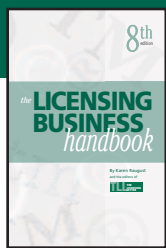
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