

TLL THE LICENSING LETTER

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Preschool Properties Post 2% Growth Worldwide; Toys Account for 45% of Global Preschool Sales, Up 3%

Worldwide retail sales of licensed character-based preschool properties (from the sectors of entertainment/character, as well as art, toy, interactive, etc.) totaled just under \$10.6 billion worldwide in 2013, up 2% from \$10.4 billion in 2012, according to new research conducted by *The Licensing Letter* for the all-new second edition of "The Global Market for Licensed Preschool Properties." Properties generating retail sales of licensed merchandise of \$100 million or more worldwide represented 77% of total sales.

The 2% growth in retail sales of licensed preschool products globally in 2013 was double the rate in 2012, when retail sales increased 1%. The relative strength of the preschool market in 2013 was due in part to the success of Disney Junior properties including Sofia the First and Doc McStuffins, which vaulted into the top tier shortly after their introduction, as well as by the general strength in retail sales of licensed products globally, compared to previous years. The continued proliferation of preschool-focused properties also played a role; most new properties have a hard time generating significant retail sales, but collectively they contributed toward a boost in total retail sales.

In terms of product categories, toys accounted for \$44.8 billion in retail sales, or 45% of the global preschool licensed property market, up 3% over 2012. Next came apparel and soft goods, with \$2.6 billion in sales (a 24% share), up 4% over 2012. Licensed book publishing for preschoolers totaled \$945 million (up 1%), while paid apps and other electronic content totaled \$806 billion (up 55%). The latter's share has gone from virtually zero in 2005 to 8% in 2013, roughly comparable to the shares commanded by traditional book and magazine publishing (9%), DVDs (7%), and noncore categories (6%).

Retail sales for noncore categories outside of toys, soft goods, publishing, and digital content continue to decline (they were collectively down 32% in 2013) as licensors put their

focus on the most important categories and products. DVD sales also continue to drop, not surprisingly. But with a decline of 5% in 2013, licensed DVDs for preschoolers outperformed the DVD market in general, and they still maintain a significant share.

All told, 85% of actively licensed preschool properties collectively totaled less than \$100 million in retail sales, together accounting for just 9% of the global market in dollar terms. Seven percent each fell into the \$20 million-to-\$49 million and \$50 million-to-\$99 million retail sales ranges, 13% drove sales of \$10 million to \$19 million, and 21% drove sales of \$5 million to \$9 million. By far the largest group

Continued on page 3

3-D PRINTING

Key Licensors Dip Their Toes in the Licensing 'Ink'

Widespread consumer usage of 3-D printing is probably five to 10 years away, according to some experts. But that hasn't stopped licensors and licensees from experimenting with the technology. In fact, the number of companies dipping a toe into the 3-D printing waters has proliferated in the last year or so.

Most examples involve collectibles, often customized, although examples range from jewelry to toys to apparel and accessories. (See sidebar.) Most properties involved to date are those with very devoted fan bases, from My Little Pony to musicians, or properties that tend to attract tech-savvy fans, such as video game and sci-fi characters, or both.

Licensing ventures to date are more about experimentation and positioning for the future rather than current revenue generation and are focused on customization and fan engagement rather than the reproduction of merchandise for daily use.

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➡ Licensing Ledger

'SCANDAL'-IZED

Following the playbook established by **Banana Republic** and "Mad Men," **The Limited** is introducing a line of licensed clothing inspired by the ABC-TV series "Scandal." The collection features more than 70 items, reports *New York Times* advertising columnist Stuart Elliott. The line is a collaboration between series star Kerry Washington; Elliot Staples, head of design for The Limited; and Lyn Paolo, the show's costume designer, and features the logos for the series and for ABC. Full disclosure: *The Times* piece quotes *The Licensing Letter* on the differences in licensing adult versus children's TV shows and the critical importance that the licensed apparel appeal to consumers. Based on our research, a hit children's TV show can do \$250 million to \$500 million annually, while a hit adult TV show (not counting a freak event such as "Duck Dynasty," which did \$400 million in 2013) will more likely be in the \$100 million vicinity.

ANOTHER 300,000 LICENSED ITEMS

JCPenney is offering 300,000 licensed products spanning all the major sports leagues in a new Sports Fan Shop area of its website. The shop is run for Penney

by **Fanatics**, which operates the e-commerce platforms for the leagues as well as hundreds of colleges and universities. Fans can select by league, team, or school and by product category. The site is touted on the retailer's home

page and has a much simpler look than Penney's site.

WHOSE SIDE ARE YOU ON?

Star Wars licensees worldwide can get a sense of which characters to favor in their assortments based on a Disney Interactive map for free-to-play mobile game "Star Wars Commander" that reveals the percentage of players in different countries aligning with the Evil Empire versus those playing for the Rebel Alliance.

A FLOWERING BUSINESS

The **New York Botanical Garden** projects earning \$550,000 from licensing this year, reports *Crain's New York Business*, up from \$150,000 three years ago when it launched its licensing program. The Garden is represented for licensing by **Jewel Branding**.



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PUBLISHER'S LETTER

The NFL Women's Market Is About More Than Fitted Jerseys

Given the media attention over domestic violence and child abuse relative to the NFL, the question we've been fielding from the press is: What's the women's market for NFL merchandise worth, and what might the league stand to lose if women express their dissatisfaction with its response by turning away from NFL merchandise?

According to *The Licensing Letter's Sports Licensing Report*, the NFL had overall retail sales of licensed merchandise of \$3.128 billion in the U.S. and Canada last year. Of that, we estimate that roughly 40% was apparel and that, within that segment, the women's share was 25% to 30%, or approximately \$313 million to \$375 million.

Assuming *TLL's* estimated 10% royalty for sports-based merchandise (based on wholesale sales), that translates to the women's apparel segment of NFL merchandise being worth \$15 million to \$18 million in royalties to the league (or roughly a third of

Roger Goodell's salary in 2012, the latest year reported).

While the NFL does not release its own figures, Leo Kane, who heads up the league's licensing operations, says the women's sector has been growing in double digits annually for the last five years and is the fastest growing segment in all NFL licensing.

Generally, we have found Americans to be very forgiving—and that they recognize that there is a difference between a league and its teams and between teams and their individual players. The current situation affects all those members of the NFL "family," whether directly or indirectly, with the players represented by NFLPA (and for licensing by NFLPI).

Most important is that the league will need to address a culture of violence and the health issues that playing the game present. Those concerns extend well beyond growing retail sales of licensed merchandise or keeping corporate sponsors happy.

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Preschool Properties

Continued from page 1

(36% of properties) generated retail sales of less than \$5 million each in 2013.

The list of \$100 million-plus properties is dominated by evergreens—Pooh, Sesame Street, Dora, Thomas, and the like—and 14 of the 20 top preschool properties of 2013 (70% of properties) originated in the English-speaking world, whether the U.S., U.K., or Australia.

But the remaining 30% of the list is comprised of properties such as Pocoyo, Doraemon, Peppa Pig, Galinha Pintadinha, and Masha and the Bear that dominate their local markets and are extensively licensed globally but have little to no business in the U.S. to date.

While the U.S. accounts for roughly 60% of retail sales of licensed merchandise across all properties, among the \$100 million-and-up preschool properties, the U.S. share is

ESTIMATED RETAIL SALES OF PRESCHOOL PROPERTIES DOING \$100 MILLION OR MORE, WORLDWIDE AND U.S., 2013 (DOLLARS IN MILLIONS)

PROPERTY	LICENSOR	GLOBAL	U.S.	% U.S.
Pooh	Disney	\$1,250	\$375	30.0%
Dora the Explorer	Nickelodeon	\$915	\$321	35.1%
Sesame Street	Sesame Workshop	\$900	\$522	58.0%
Peter Rabbit	Silverage Media	\$850	\$75	8.8%
Thomas	Mattel (HIT Entertainment)	\$599	\$200	33.4%
Doraemon	Shogakukan-Shueisha	\$500	*	N/A
Peppa Pig	eOne	\$428	*	N/A
Doc McStuffins	Disney	\$320	\$220	68.8%
Sofia the First	Disney	\$300	\$220	73.3%
Miffy & Friends	Mercis	\$450	\$60	13.3%
My Little Pony	Hasbro	\$270	\$220	81.5%
Galinha Pintadinha	Bromelia	\$250	*	N/A
Patati and Patata	Rinaldi Productions	\$217	*	N/A
Minnie's Bow-Toons	Disney	\$180	\$90	50.0%
Mickey Mouse Clubhouse	Disney	\$150	\$75	50.0%
Strawberry Shortcake	American Greetings Properties	\$150	\$60	40.0%
World of Eric Carle	Eric Carle	\$125	\$75	60.0%
Pocoyo	Zinkia	\$120	*	N/A
The Wiggles	The Wiggles Pty. Ltd.	\$100	*	N/A
Masha and the Bear	Animaccord	\$100	*	N/A
TOTAL		\$8,174	\$2,513	30.0%

* = \$20 million or less.

Numbers include only products for preschoolers (e.g., older-skewing products for My Little Pony are not included).

Includes only licensed and not in-house-produced merchandise (e.g., merchandise sourced by a Disney division for theme parks or Disney-owned stores is not included.)

Toys tied to Hasbro-owned My Little Pony or Mattel-owned Thomas are not included because toys are the core business, not licensed.

Includes DVDs, apps, and other digital content, if not in-house-produced.

SOURCE: THE LICENSING LETTER

RETAIL SALES OF LICENSED MERCHANDISE BASED ON PRESCHOOL PROPERTIES, BY PRODUCT CATEGORY, WORLDWIDE, 2012-2013 (DOLLARS IN MILLIONS)

CATEGORY	RETAIL SALES 2013	RETAIL SALES 2012	% CHANGE 2012-2013	SHARE, 2013
Toys	\$4,820	\$4,680	3%	45%
Apparel, accessories, soft goods	\$2,596	\$2,496	4%	24%
Publishing	\$845	\$936	1%	9%
Paid apps and electronic content	\$806	\$520	55%	8%
DVD	\$790	\$832	-5%	7%
Other	\$638	\$936	-32%	6%
TOTAL	\$10,596	\$10,400	2%	100%

SOURCE: THE LICENSING LETTER

only 30%—in large part because seven of these properties have little or no presence in the U.S.

The top five properties globally, which did between \$850 million and \$1.25 billion each in 2013, account for 55% of global retail sales of licensed merchandise among the \$100 million-plus properties and 43% of all preschool properties. For the U.S., the top five account for 59% of the \$100 million-plus properties.

Disney, with five properties on the \$100 million-plus preschool list, accounts for 27% of retail sales of licensed merchandise in this group globally and 88% of the list's sales in the U.S. No other company has more than one property on the \$100 million list.

The all-new second edition of "The Global Market for Preschool Properties" ranks 137 dedicated preschool properties by retail sales worldwide. The report also discusses the impact of nonpreschool properties such as Star Wars, Peanuts, Disney Princess, and others that have a strong presence in the preschool market and provides demographic data and analysis of preschool markets in key territories worldwide.

For additional information or to order the report, see www.epmcom.com/preschool, or call 212-941-0099.

EU Limits Library Digitization

Libraries in the European Union may digitize works in their collections—even if the libraries have decided not to purchase digital editions made available by the publishers—but only for display at dedicated reading terminals, according to a judgment issued by the EU Court of Justice. Libraries may seek an exception from publishers that would permit library patrons to print and/or put the digital document on a flash drive, assuming "fair compensation" to the rights holder. The judgment comes following a request for clarification in a German case where German publisher Eugen Ulmer KG is suing the Technical University of Darmstadt. The implications of this judgment on, say, blueprints for 3-D printing, videos, games, or other items that might be lent by a library, remain to be seen.

VENUE SALES

For Music Acts, What Comes After the T?

It's always been about the T-shirt for live concert music merchandise sales. But just how much do T-shirts account for?

T-shirts account for 63% of gross dollar sales of venue concert merchandise in the U.S., according to atVenu, a company that makes an app for music artists that manages and tracks their merchandise sales.

The data are based on sales of 4.2 million items at 25,000 concerts by more than 1,200 artists across all music genres over an 18-month period through July 2014. (That's worldwide; the U.S. figures represent about 80% of the total for this sample.)

Retail sales of licensed merchandise based on music properties in the U.S. and Canada grew to \$2.56 billion in 2013 from \$2.15 billion in 2009, according to *The Licensing Letter's Licensing Business Databook*.

Apparel overall, including T-shirts, tank tops, hoodies, and hats, among other items (see chart), accounted for 84% of venue sales for this sample. CDs represented 6% of sales, posters 2%, and vinyl 1%. T-shirts accounted for 75% of the apparel total.

Wristbands, programs, can coolers, bags, and bracelets are around half a percent each but still generated sales in the \$400,000-to-\$650,000 range for these artists.

"People gravitate to the staples," says atVenu co-founder Derek Ball, "but after T-shirts, there are significant differences by genre and demographic.

"Hip-hop artists sell a lot of rolling paper. If you're a country artist, you're selling a lot of beer koozies. The only other genre that sells can coolers is heavy metal. (Note: In atVenu's tables, the product is referenced as Koozies, which is a brand name. We don't know if these are co-branded or whether the brand name is being used generically).

"Looking at demographics, it's no surprise that 16-to-20-year-old girls buy more t-shirts, while 21-to-30-year-old males spend their money on beer."

atVenu sees more than two times the number of sales of zip-up hoodies as pullover hoodies. And the company is starting to track color and gender.

"We know that black is the best color for a t-shirt, but a year from now, based on the sales data we are seeing, we should be in a position to recommend to an act what percentage they should have of purple, blue, white, or red based on fan preferences, but also based on geography," Ball tells us.

The same holds for size distribution and pricing.

In a separate analysis, atVenu confirms the per-capita spending averages that have long been the norm for measuring artist sales. Venue sales are typically expressed per concert attendee rather than per purchase.

For most pop music acts, the average falls in the \$3.50-to-\$4.00 range, reports atVenu. Country acts, on average, do about \$2.55 per capita, with R&B/soul performers at \$2.12. J-pop is at the other end of the spectrum, at \$7.68 a

head, while jazz comes in at \$4.24 per attendee.

No doubt executives at Epic Rights, Warner/Rhino, Bravado, LiveNation, and elsewhere, who have been in the business much longer than atVenu, know these stats, but atVenu is the first we know of to release aggregate data in this form publicly.

VENUE APPAREL SALES, BY PRODUCT, FOR MUSIC ACTS USING atVenu APP TO MANAGE MERCHANDISE SALES, U.S., JANUARY 2013-JULY 2014

ITEM	SALES GENERATED	SHARE OF APPAREL SALES
T-shirts	\$49,088,279	75%
Tank tops	\$5,607,184	9%
Zip-up hoodies	\$2,606,678	4%
Sweatshirts	\$1,853,027	3%
Long sleeve shirts	\$1,652,525	3%
Pullover hoodies	\$1,293,272	2%
Hats	\$1,160,226	2%
Jerseys	\$736,490	1%
Shorts	\$621,113	1%
Jackets	\$442,172	1%
Knit hats	\$115,750	<1%
Slouch tees	\$73,255	<1%
Work shirts	\$27,715	<1%
APPAREL TOTAL	\$65,277,686	

SOURCE: atVenu

TOP FOUR MERCHANDISE ITEMS SOLD BY MUSIC ACTS AT CONCERT VENUES, BY GENRE

Alternative

1. T-shirts
2. Tank tops
3. Sweatshirts
4. Zip-up hoodies

Rock

1. T-shirts
2. Tank tops
3. CDs
4. Zip-up hoodies

Metal

1. T-shirts
2. Tank tops
3. Long sleeve shirts
4. CDs

Pop

1. T-shirts
2. Tank tops
3. Zip-up hoodies
4. Programs

Country

1. T-shirts
2. Tank tops
3. Long sleeve shirts
4. Koozies

SOURCE: atVenu

Singer/Songwriter

1. T-shirts
2. Zip-up hoodies
3. Posters
4. Wristbands

Christian and Gospel

1. T-shirts
2. CDs
3. Zip-up hoodies
4. Jerseys

Hip-hop/Rap

1. T-shirts
2. CDs
3. Pullover hoodies
4. Tank tops

Electronic/Dance

1. T-shirts
2. Tank tops
3. Pullover hoodies
4. Vinyl

Punk

5. T-shirts
6. Tank tops
7. CDs
8. Hats

Licensing News

Properties Available Or Recently Assigned, U.S.

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Animal Planet	Discovery-owned cable network.	Apparel, back-to-school, pet products, publishing, toys	Ian Woods, Discovery Communications
PoloGear	Provides gear to and sponsors polo since 1993.	All	Al Ovadia, All-American Licensing & Management Group (AALMG)

Licenses Recently Granted, U.S.

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Artists of Rock	Gold Label	Fashion accessories, fashion tops, hoodies, T-shirts	Kitsch Cache
Assassin's Creed	Upper Deck Collectibles & Upper Deck Authenticated	Games, posters, trading cards	Ubisoft
Banana Boat	Morgan Home/Notra Trading	Beach accessories, beach mats, beach towels, swim sacs, tote bags	Brandgenuity
Bethenny Frankel/Skinny Girl	Teva Foods div. Golden West Food Group	Dips, hummus, salsas	CAA
Family Guy	Rook Brand Clothing	Accessories, apparel, T-shirts	20th Century Fox Consumer Products
Gas Monkey Garage	Gatco/The Great American Tool Co.	Utility knives	Brandgenuity
	MjC Intl. Group	Sleepwear	
	Waterloo Industries	Tool boxes, tools	
	West Chester Protective Gear	Utility knives, welding caps	
Guardians of the Galaxy	Peavey	Guitar accessories, guitars	Disney Consumer Products
Hawaiian Tropic	Morgan Home/Notra Trading	Beach accessories, beach mats, beach towels, swim sacs, tote bags	Brandgenuity
Julia Buckingham	Global Views	Furniture, home accessories, lighting fixtures, rugs	Salmore Partners
Kathy Ireland Home	Sam Salem and Sons	Blankets, throws	Kathy Ireland Worldwide
Kori Kumi	Gut Distribution Srl	Back-to-school stationery, diaries, folders, notebooks	Santoro Licensing
Life's S.o. R.a.d.	Kohl's	Dresses, knits, leggings, skirts, sweaters	AwesomenessTV
Loudmouth	Jay Franco & Sons	Bath accessories, bath towels, comforters, pillows, sheets, shower curtains, throws	Brand Liaison (The)
	Zeikos/iHip	Bluetooth speakers, earphones, headphones, mobile chargers (U.S.)	Loudmouth Golf
Marvel Avengers	Candyrific*	Candy dispensers	Disney Consumer Products
Mountain Dew	JNJ Intl.	Scooters, skateboards	Joester Loria Group
NASCAR	G-III Apparel Group*	Maternity clothing	NASCAR
Nashville (TV show)	Opry Entertainment Group	Accessories, gift items, T-shirts	Knockout Licensing
NBA properties	Harman Intl.	Headphones, speakers	NBA Global Merchandising Group
NCAA	G-III Apparel Group*	Maternity clothing	National Collegiate Athletic Association (NCAA)
NFL	G-III Apparel Group*	Maternity clothing	NFL
NFL Properties	FanPrint	Customizable T-shirts, T-shirts	NFL Players

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Licensing News *Continued from page 5*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
NHL	G-III Apparel Group*	Maternity clothing	National Hockey League (NHL)
Old Guys Rule	Past Time Signs	Clocks, metal art signs	Old Guys Rule
	Tervis	Drinkware	
	Wine of the Month Club	Wine	
Paw Patrol	Rubie's Costume	Costumes (children's), costumes (toddlers')	Nickelodeon & Viacom Consumer Products
Penguins of Madagascar	Little Orbit	Video games (Wii, Wii U, 3DS)	DreamWorks Animation
Red Bull Air Race	Roadhouse Interactive	Video games	Red Bull North America
Serta	Delta Children's Products	Cribs, mattresses, nursery furniture	Serta
Sons of Anarchy	Boom! Comics	Comic books	20th Century Fox Consumer Products
	Changes	Apparel	
	Gale Force Nine	Games, toys	
	Metal Mulisha div. La Jolla Group	Apparel	
	Mezco Toyz	Games, toys	
	Running Press Book Publishers	Books	
	St. Martin's Press	Books	
	Time Inc.	Magazines	
Star Trek	Zippo Manufacturing	Collectibles	CBS Consumer Products
	GameSamba div. Group 1200 Media	Online games	
Terminator	National Entertainment Collectibles Association (NECA)*	Collectibles	Creative Licensing Corp. (CLC)
	Sideshow Collectibles *		
Three Stooges (The)	Photorealism	Fine art	C3 Entertainment
Tony Hawk	Innovation First	Skate ramp sets, skateboards	Tony Hawk
Walking Dead (The)	Stern Pinball	Pinball machines	AMC Networks

*Extension or renewal.

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Licensing News *Continued from page 6*

International Properties Available or Recently Assigned			
PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Boj	Preschool animated comedy follows the adventures of Boj the Australian Bilby. Currently airing in the U.S., EMEA, and Australia.	All (Worldwide)	Claire Underwood, Pesky Productions Ltd.
Country Diary of an Edwardian Lady	TV series based on Edith Holden's book, published posthumously in 1906.	Gifts, home decor, quilting goods, stationery (U.S., Canada)	Rob Mejia, RJM Licensing
Discovery Adventures	Cable network emphasizing travel experiences.	Camping equipment, luggage, travel accessories (EMEA)	Ian Woods, Discovery Communications
Discovery Channel	Flagship brand seeking licensees in consumer products.	All (EMEA)	
Discovery Expedition	Cable network developing outdoors lifestyle brand.	Accessories, apparel, footwear (EMEA)	
Furchester Hotel (The)	Sesame Street spin-off series, aimed at 3-to-6 year-olds, features the Muppets as hotel staff.	Digital media, home video, publishing (U.K.)	Vickie O'Malley, Copyright Promotions Licensing Group (CPLG)
Gallina Pintadita	YouTube-based preschool property extremely popular in Brazil.	All (Panama, Central America, the Caribbean, Ecuador, Venezuela, Peru, Chile)	Fanny Salazar Mourre, P&L Global Network
Justin Time	Animated Canadian preschool TV series.	All (Central and Eastern Europe, Middle East, Africa)	Dominic Gardiner, Jetpack Distribution Ltd.
Little Princes	Animated preschool series based on children's picture books.	All (Worldwide)	Jean-Philippe Randisi, Zodiak Kids
Lolirock	Girls series follows the journey of a seemingly ordinary teen whose life changes forever when she auditions for the girl band Lolirock.	All (Worldwide)	
Lumberjack	Italian lifestyle brand seeking to expand to Europe, Russia, and China.	Accessories, apparel (Worldwide)	Hakan Durda, Sinerji
Peppa Pig	Animated British preschool series.	Arts and crafts kits, bath ensembles, beauty supplies (France)	Nathalie Bobineau, FranceTV Distribution
Universal Studios	EWL will represent the studio portfolio of properties.	All (Middle East, North Africa)	Helen Fielding, East West Licensing
Viacom properties	Ananey adds individual programs to its existing roster of VIMN-owned channels in Israel, including Paw Patrol and Dora, both launching in that territory in 2015	All (Israel)	Orly Atlas Katz, Ananey
Zack & Quack	New preschool show follows the adventures of a boy and his duck as they journey through a pop-up book. Currently negotiating master toy and publishing deals.	All except master toy and publishing (Worldwide)	Jean-Philippe Randisi, Zodiak Kids

International Licenses Recently Granted			
PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Better Call Saul	Trends International	Bookmarks, decals, gift bags, gift wrap, posters, stickers, writing instruments (U.S., Canada)	Sony Pictures Consumer Products
Boo—The World's Cutest Dog	Delfino Co.	Bracelets, calendars, cases and accessories, diaries, folders, necklaces, sticky notes, T-shirts (Japan)	Tact Communications
	Stationery Team Europe BV	Agendas, back-to-school, backpacks, binders, erasers, file folders, labels, rulers, stationery, stationery sets, wrapping paper (Europe)	Knockout Licensing
	Takarajima Sha Inc.	Photo books (Japan)	Tact Communications
Call of Duty: Advanced Warfare	Trends International	Posters (U.S., Canada)	Activision
Carter's	Kids Preferred	Activity toys, play gyms, plush rockers, plush toys, scooters, wood toys, wooden puzzles (U.S., Canada)	Carter's

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Licensing News *Continued from page 7*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Dennis the Menace	Dr. Martens*	Shoes (Worldwide)	DC Thomson
Frozen	Cartamundi Group	Card games (U.K.)	Disney Consumer Products
Furcheater Hotel (The)	Hasbro	Master toy (Worldwide)	Copyright Promotions Licensing Group (CPLG)
Gnasher	Dr. Martens	Shoes (Worldwide)	DC Thomson
Me to You	Aykroyd & Sons Ltd.	Apparel (girls') (U.K.)	Carte Blanche Greetings
Mia and Me	Rubie's Masquerade Co. UK Ltd.	Costumes (girls') (EMEA)	m4e AG
Minnie the Minx	Dr. Martens	Shoes (Worldwide)	DC Thomson
Mister Maker	Dreamtex	Bedding (Worldwide)	Zodiak Kids
National Geographic	Home Source Intl.	Beach towels (North America)	National Geographic Society
National Geographic Kids	Home Source Intl.	Beach towels (North America)	
Norton	Clarks	Boots, footwear (U.K.)	Norton Motorcycles Ltd.
Octonauts	Leapfrog Online	Mobile game apps (Worldwide)	Silvergate Media
Peppa Pig	Calego Intl.	Luggage (France)	FranceTV Distribution
	CIJEP	Plush (France)	
	Comansi	PVC figurines (France)	
	Diset S.A.	Board games (France)	
	Educa Borrás SA	Educational games (France)	
	Gemma Intl.	Party goods (France)	
	Groupe Royer	Footwear (France)	
	Milan Presse	Magazines (France)	
	Panini France S.A.	Albums, stickers (France)	
	Ravensburger AG	Puzzles (France)	
	Stor SL	Housewares (France)	
Pip Ahoy!	John Adams Leisure Ltd.	Master toy (U.K.)	Lisle Intl. Licensing
Playboy Trademarks	Joyrich	Dresses, scarves, shirts (U.S., Japan)	Playboy Enterprises
Ranch (The)	Lansay France	Back-to-school, stationery, toys (Worldwide)	Zodiak Kids
Shelli Segal	Cellairis	Cell phone accessories, mobile accessories, mobile device and tablet protective cases (U.S., Canada, England, Mexico, Chile, UAE, Jamaica, Australia)	Perry Ellis Intl./PEI Licensing
Teletubbies	Character Options	Bath toys, master toys, plastic toys, plush (Worldwide)	DHX Media
Terminator	Cotton Division	Apparel (France)	Creative Licensing Corp. (CLC)
	Grey Matter Art	Posters (North America)	
	Mighty Fine	Apparel (North America)	
	Sage Beverage	Spirits (North America)	
	USAOPOLY	Board games (North America)	
Terminator 2	Cotton Division	Apparel (France)	
	Grey Matter Art	Posters (North America)	
Uglydoll	Franco Manufacturing	Bath items, beach items, bedding (North America)	Pretty Ugly
Wisdom of Kids (The)	Gemma Intl.	Greeting cards (U.K.)	JELC Ltd./Blue Trellis



contacts & connections

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

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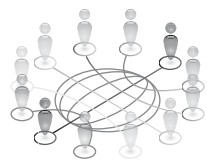
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3-D Printing

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They may involve licensed blueprints to allow fans to make 3-D-printed products at home or, more commonly, a print-on-demand service for a customized product that is designed online then 3-D printed and shipped to the purchaser. Dedicated fans can join online communities where they can create and share designs.

Coca-Cola and will.i.am licensed their Ekocycle brand to 3D Systems for a consumer 3-D printer called the Ekocycle Cube, which comes with 25 printable concepts and uses filament partially made of plastic Coke bottles. (3D Systems also has partnered with Hershey's to develop 3-D chocolate printers.) Home Depot and Staples are among the retailers offering 3-D printing services, along with a multiplicity of online purveyors.

Today's ventures represent a first step in using a technological advance and are likely to have a fundamental impact on the licensing and consumer products businesses in the future, akin to what happened to the music business when MP3s came on the scene. Once 3-D printers and scanners come down in price, consumers will be able to create their own products in the image of their favorite character or other property by downloading a blueprint, creating their own pattern—although that will have to become much easier and more

SELECTED EXAMPLES OF LICENSED 3-D PRINTING PROJECTS

- ▶ Consumers can 3-D print ceramic figurines of themselves as Star Trek characters through an initiative between CBS Consumer Products and 3DMe, a service of 3D Systems/Cubify. A similar service called 3DPlusMe works with licensors including Major League Baseball, Ubisoft (Assassin's Creed), and Marvel.
- ▶ Pretty Ugly partnered with MakerBot to allow fans to order 3-D-printed collectibles of four Uglydoll characters in various poses, available through the MakerBot digital store. Sesame Workshop has a similar venture with MakerBot, with the first character being Mr. Snuffleupagus.
- ▶ Rock band Linkin Park works with Staramba, a German company, to create 3-D figures of the band members, available online, as well as "3-D selfies" of the fan/purchaser along with his or her favorite band member, available at the band's concerts.
- ▶ Hasbro partnered with Shapeways to develop 3-D printing initiatives, starting with a user-generated content site where fans can join the Shapeways community, create original art based on Hasbro properties, and then have it printed in 3-D. Shapeways also has a number of communities focusing on Mojang's Minecraft.
- ▶ Video game companies have paired with 3-D printing services to allow players to create 3-D versions of their avatars; examples include Harmonix (Rock Band 2) with Z Corp. and Blizzard (World of Warcraft) with FigurePrints.
- ▶ Warner Bros. UK teamed with Microsoft for 3-D-printable blueprints of the Key to Erebor, which plays a central role in the *Hobbit* trilogy.
- ▶ Nick Graham of Joe Boxer fame is introducing 3-D-printable tie pins, bracelets, cuff links, belt buckles, and wallets in stainless steel.
- ▶ Monskey is a Dutch property that combines an online game with 3-D printing. Fans can design their own custom Monskey character and purchase a 3-D-printed version. The most popular go into the game.
- ▶ Disney has a service called DTech Me that allows fans to customize a collectible figure by scanning their own bust and creating a figure in which they are portrayed as a storm trooper.

SELECTED PRODUCTS AVAILABLE FOR ON-DEMAND 3-D PRINTING, BY VENDOR

3-D ITEM TO BE PRINTED	3-D PURVEYOR	LICENSOR/PROPERTY	LINK
Ceramic figurines	3DMe	Star Trek	www.3dsystems.com
	3DPlusMe	MLB, Ubisoft (Assassin's Creed), Marvel	www.3dplus.me/
Collectibles	MakerBot	Ugldoll, Sesame Workshop	www.makerbot.com/
Figures, 3-D "selfies" with band members	Staramba	Linkin Park	staramba.com/linkinpark/
Original art	Shapeways	Hasbro properties including My Little Pony, Transformers, Mojang's Minecraft	www.shapeways.com/
Jewelry	Shapeways	Nick Graham	www.shapeways.com/shops/nick-graham
Avatars	Z Corp (owned by 3dSystems)	Harmonix (Rock Band 2)	www.3dsystems.com
	FigurePrints	Blizzard (World of Warcraft)	www.figureprints.com
Blueprints/Ad campaign	Microsoft	Warner Bros. (Key to Erebor from Hobbit trilogy)	advertising.microsoft.com/en/blogpost/128916/microsoft-advertising-blog/microsoft-warner-bros-uk-launch-first-ad-campaign-featuring-3d-printing
Toys	Various	Monskey	www.monskey.nl/3d-monskey-studio/
Personalized action figures	Firebox.com	Captain America, Catwoman, Ironman, Batman, Superman, Thor, Wonder Woman Disney Star Wars	www.firebox.com/product/5300/Personalised-Superhero-Action-Figures?via=related
Chocolate, other foods	3DSystems	Hershey's	www.3Dsystems.com ; mashable.com/2014/01/19/3d-chocolate-printer-hersheys/

NOTE: 3D Systems and MakerBot are owned by the same company.

Source: THE LICENSING LETTER

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3-D Printing

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consumer-friendly than it is today—or even scanning an existing product and duplicating it at home.

Once easy-to-use, speedy, and cost-effective 3-D printing services and printers become widespread, they will threaten the foundation of the licensing business. It will be difficult to police the market for trademark infractions; already fans at Maker Faires are 3-D printing and selling Wolverine claws for children, while fans are making unauthorized versions of Yoda and Tintin on MakerBot's Thingiverse 3-D printing community.

Even more importantly, in the long term, consumers will be able to simply make their own products (legally or illegally), disrupting the whole consumer products business. Rather than purchasing a shoe, they will be able to download a blueprint and print the shoe, or the parts, at home. Instead of a licensee making licensed toys to sell to fans, it might make a blueprint that would allow fans to each print their own toy, in a so-called “distributed manufacturing” model.

In some ways, this model makes sense, representing the ultimate just-in-time manufacturing process. But it requires a whole new way of looking at the consumer products and licensing businesses and rethinking trademark protection and other fundamental issues.

Much depends on how interested consumers will be in taking the time to make their own goods. There is still the element of seeing, touching, and trying on that 3-D won't accommodate. That said, the threat is real, and it is not too soon to consider the possibilities and to attempt to leverage the technology (and the law) for positive results.

Who's News

Jeff Dunn will be the first CEO at Sesame Workshop to be hired from outside the organization. Dunn, former CEO/president of Hit Entertainment (2008-2012), is a 2014 Advanced Leadership Initiative Fellow at Harvard, focusing on media and education. Prior to Hit, he served as Group COO of Nickelodeon Networks and President of Nickelodeon Film and Enterprises.

Kerry Phelan joins Lionsgate as EVP of Global Franchise Management and Strategic Partnerships. Phelan has worked with DreamWorks, Pixar, Lucasfilm, and LEGO.

Vince Klaseus joins Universal Pictures as President of a newly created brand development division. Klaseus was previously with Cartwheel Kids, Disney, and Mattel. **Stephanie Sperber** continues as President of Universal Partnerships & Licensing, and **Glenn Ross** continues as Universal 1440 Entertainment EVP/GM.

Kenneth Frieze is promoted from President to CEO of investment outfit Gordon Brothers Group.

Rick Blackshaw is promoted to President, Sperry Top-Sider, and **Chris Lindner** to President, Keds, at Wolverine Worldwide.

Kay Ferneyhough joins Sega Europe's London office as Retail License Manager. Kay most recently bought licensed boys clothing for George at Asda.

Don Garrison is named consulting brand manager at Old Guys Rule. Garrison is former president of BHP Marketing.

Richard Goldsmith adds oversight of The Jim Henson Co. international consumer products business to his responsibilities as EVP of Global Distribution.

Francesca Stobbe joins the organization as Executive Director of international consumer products. Stobbe comes to Henson from Disney.

Michael Ouweleen is named CMO at Turner Broadcasting's Cartoon Network where he will also oversee Adult Swim and Boomerang.

Natalie Dumoulin is named VP Creative Affairs at 9 Story Entertainment. Dumoulin most recently served as creative producer for Shaftesbury and director of international youth development for Pixcom.

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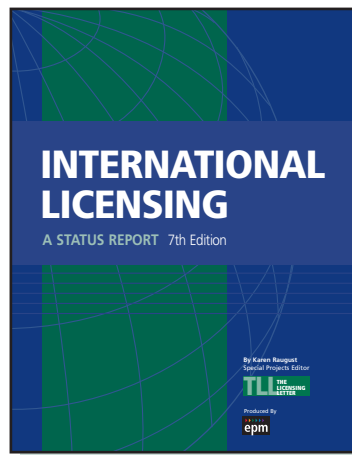
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