

TLL THE LICENSING LETTER

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2014 Optimism Revisited: Licensing' Opportunities Rooted In Speed-to-Market, New Distribution, Globalization

Fall is the season when licensing executives tout their optimism about next year. That's because most have abandoned their optimism for this year. It's akin to the old adage about the Army—the best base is the one you were at last or the one you're going to, never the one you're at.

Much turns, of course, on the retail outlook. By fall, retailers have started to sense the reality going into the all-important holiday season. Back-to-school, for most, was good if not great this year. But very soon thereafter most retailers scaled back their fourth quarter projections.

Of course life looks better with a hit, and the merchandising of Disney's *Frozen* has the potential to raise perceptions of licensed goods across the entire licensing community, internally and externally.

Released a year ago, and catching Disney and its licensees off-guard, *Frozen* turned into the highest grossing animated film of all time. Licensing was ramped up in time for the home video release. And momentum for the property continues as reflected in reports of frenzied sales of Snow Glow Elsa dolls and Elsa and Anna dresses.

Fall is also the season to review what licensors, manufacturers, retailers, agents, and other stakeholders have achieved—and to try to assess what those achievements mean for the coming year.

Product Development and the Need for Speed

Over the last few years, demand patterns for licensed goods have changed—retailers and consumers expect more new goods faster than ever—while the support mechanisms have not kept pace.

Instant printing and other technologies should be helping reduce the time it takes to manufacture goods, but that's only part of the equation. Product development, approvals, manufacturing, shipping—the nuts and bolts

of licensing—don't move quickly.

Rapid decision-making at a company such as Inditex, which owns Zara and Mango, can be a significant differentiator in the fast-fashion category. Inditex has designers in factories who can make decisions relative to orders and production right on the manufacturing floor.

While Zara and Mango aren't in licensing, as such, that process addresses only part of the equation on the need for speed; a great deal of the slowness in licensing is from the back and forth on development and approvals more than the manufacturing itself.

Then there is the matter of secrecy, as when video game companies don't want to make information about their titles known, even under nondisclosures to their licensees, until the release date. That makes it difficult to have merchandise in the stores during peak interest.

In contrast, movie studios are involving their licensing divisions in script and character development in order to maximize the merchandising potential, though the actual availability of finished artwork often comes close to release date, making it difficult for licensees to have goods available day-and-date with release.

"One filmmaker who joined DreamWorks Animation film development meetings...recently voiced surprise at the extent to which decisions about a movie's content and characters were being driven by the toy executives who joined the sessions," reports *The New York Times*. "Mr. [Jeffrey] Katzenberg...was particularly intent on incorporating product-friendly elements." We have heard similar reports from other studios, right down to which sex the lead character in a film should be.

Such synergy between film and merchandise development can ultimately help speed the process of getting goods to market as soon as there is demand, be that shortly after release, or in the home entertainment window, or as Episode II is prepped for quick release.

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in short

Best of the Season!
This is the last issue of The Licensing Letter for 2014. The next issue will be dated January 3, 2015. We wish all of our subscribers a wonderful holiday season.



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➡ Licensing Ledger

CHEROKEE'S RELIANCE

Cherokee Global Brands is developing an apparel and accessories brand for India's **Reliance Retail Limited**, a subsidiary of **Reliance Industries**. The two hope to roll the brand out globally following the Indian introduction.

RIPPED FROM HEADLINES

Tightrope artist Nik Wallenda has licensed mobile gaming companies **Tapinator** and **HyperPower Game Group** to release of "SkyBalance by Nik Wallenda," a licensed mobile game for iOS, Android and Amazon. The game commemorates a live Discovery Channel event in which Wallenda traversed skyscrapers in Chicago.

MARLEY'S ORGANIC GROWTH

Marley Natural, the company that licenses the late reggae singer Bob Marley's name, is adding the most organic of products to its offerings: Marley Natural Fine Cannabis grown from "heirloom Jamaican cannabis strains" as well as creams, topicals, balms, and accessories. The plan is to grow, distribute, and market the product in states where it is legal by the end of 2015. Licensee is **Privateer Holdings**, a private equity firm that makes cannabis industry investments.

HOW SHARP IS BEST BUY?

Sharp is licensing its name to **Best Buy** for a direct-to-retail exclusive line of LED TVs. That's not all that unusual, except that Sharp's core business is manufacturing TVs, and the brand has its own Sharp Aquos brand of LED TVs. Sharp's insists this is not a case of Sharp granting Best Buy permission to use the Sharp name on Best Buy's house brand Insignia sets.

QSRs EMBRACE LICENSING

"There was a time when chains feared that offering their food in supermarkets would keep consumers away from the restaurants," notes *QSR Magazine*. "But that archaic notion has gone by the wayside as quick-service brands

are increasingly finding a great deal of success offering some of their products at retail." The article goes on to cite examples including **Marie Callender's** (which used to be licensed but is now part of **ConAgra**, which manufactures its own food products), **Bob Evans**, **White Castle**, **Dunkin' Donuts**, and others that have lines of supermarket food and beverages.

JULIUS POPS UP

Saban Brands' Paul Frank has opened a popup shop in the chic Paramount Hotel in New York. The outlet features apparel, sleepwear, accessories, and NYC-themed gifts. The location will be open through January 30, 2015. A charitable component benefits Covenant House, which serves homeless, run-away, and at-risk youth.

HORNETS' SLAM DUNK

With the **NBA** team's return to its original Hornets name—and return to Charlotte following a 12 year run as the New Orleans Bobcats—retail sales of licensed merchandise for the team are up 77% so far this year over last, the team's Peter Guelli tells *The New York Times*. At Fanatics, which manages most league and team website merchandise sales, Hornets merchandise is up fivefold over last year's Bobcats goods.

BUNDLING GOODS WITH MUSIC

Garth Brooks's **GhostTunes** music downloading service rolled out last month in tandem with release of Brooks' "Man Against the Machine" album, his first in 13 years. The new service allows artists to bundle licensed merchandise, tickets, and the music itself, to order. While others bundle

merchandise, **GhostTunes** reportedly pays 80% of music sales to the artist — compared to 70% for iTunes and Amazon.

NOKIA LICENSING 'OTHER DEVICES'

Nokia is making its brand name available for licensing of tech devices and other products except for handsets, including a tablet made by Foxconn. As for phone handsets, while Microsoft has just introduced a new handset without the Nokia name, Microsoft's license to use the name runs through 2016. "What we're looking at here is not Nokia's 'return' to the smartphone business...but simply a case of Nokia allowing another company to do all of the hard work and market their products using its brand," notes the **NokiaPowerUser** blog. That's what some of us call licensing!

STAYING ONE TECH AHEAD

Outfit7 is licensing its app, Talking Tom and Friends, to **Toyze** to enable users to customize 3-D-printable game characters. Users—there are 230 million of them monthly, according to the company—can use a free app to personalize Talking Tom (first character available; others to follow) and then share the creation via social media. Alternately, they can model and print their own toys, specifying size (1-8 inches), eye color, hairstyle, clothing, and more. A Talking Tom CGI animated series is also in the works.

WHO'S NEWS

Vinnie D'Alleva joins **Mattel** as SVP **Fisher-Price Friends**, overseeing **Thomas & Friends**, **Bob the Builder**, and other **HIT Entertainment** Properties. D'Alleva was previously President/GM of North America at the **Mayborn Group**... Steve LaBella, SVP **Fisher-Price Preschool**, adds responsibility for product development on **Nickelodeon's Dora and Friends: Into the City** and **Disney's Jake and the Never Land Pirates**.



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THE LICENSING LETTER (ISSN: 8755-6235) is published 22 times a year by EPM, a Division of Plain Language Media, LLC. The annual subscription price for THE LICENSING LETTER is \$489 per year/\$549 outside North America. Low-cost site licenses are available for those who wish to distribute this newsletter to their colleagues at the same firm. Please contact our business development department at rcochran@epmcom.com or 212-941-1633 ext. 18 for details.

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2014 Optimism Revisited

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Disney, which is unique in this as in many other ways, is shrinking the time between the debut of a new series or character and when merchandise reaches the shelves. Similarly, Nickelodeon's new show "Blaze" will have products out less than a year after the debut of the show, a first for that licensor. But Disney can force the issue with manufacturers and retailers to best even a one-year lag. No one else has that leverage.

Distribution Channels: Online

For licensed sports merchandise, online accounted for 10% of sales in the U.S. and Canada in 2013. That compares to 8.5% for licensed goods across all property types. We suspect that sports figure will have increased a point or two in 2014 (final word on that late in the first half of 2015), and will continue to outpace the growth of online overall in the immediate future.

Sports is unique on several fronts, though:

- ▶ Fanatics has a near monopoly in managing league, team, and player websites selling licensed goods — as well as running its own sites competing with the league, team, and player sites.
- ▶ TV exposure for the major sports is enormous, and there's ample opportunity to promote online shopping through TV ads. This is a perfect combination for encouraging impulse purchases.
- ▶ The leagues have vastly improved the way they merchandise special events, and their licensees have vastly improved speed-to-street (and online store) even for unplanned events such as hitting an unexpected milestone.
- ▶ Sports leagues and teams have been speedy and high-profile in terms of personalization of merchandise online.

Online has become more valuable to other types of properties, too, but for many that's more a matter of catering to niches than to a mass sports audience.

Most important is integrating online with more traditional distribution channels. The consumer today expects (even if it isn't reality much of the time) a seamless experience across channels, whether researching or purchasing. Order online and pick up in-store. Order online for home delivery (with free shipping expected). Buy online and return in-store. Comparison shop online while in the store. And so on. This holiday season, Target is introducing an addition to its app to help customers locate items in the store.

In the music world, Merchbar is trying to be the Fanatics of music merchandise, claiming to offer more than 100,000 items from more than 3,000 music artists. Many have only one or two items, and many of these are vinyl LPs or other core music rather than licensed products. Also featured are bundles, such as a Tony Bennett/Lady Gaga signed CD with lithograph for \$400. But the bulk of offerings are also the usual hoodies, t-shirts, and caps.

Distribution Channels: Bricks and Mortar

The winnowing down in the number of major retailers appeared to slow somewhat in 2014. That isn't to say retail is getting stronger, but more that the weakest players are losing in the battle of Darwinian natural selection.

JC Penney appears to be turning a corner; Sears and Kmart not so much. Best Buy is profitable once again but Radio Shack is still troubled, in a segment where low margins have destroyed many others over the years. (Remember Circuit City? Silo? Crazy Eddie?)

Teen retailers such as Aeropostale, Abercrombie, and American Eagle are reducing the number of their stores.

Specialty retail, particularly in apparel and accessories, continues to increase its reliance on capsule collections, exclusives, and other licensed means of differentiation. Forever 21, for example, introduced a limited-time apparel and accessories collection featuring animated Looney Tunes and Hanna-Barbera characters from Warner Bros.

Walmart, Target, Tesco, and Carrefour continue to experiment with different format stores, moving toward smaller rather than larger, and all have slowed their expansion plans. Carrefour's clearly stated priority to investors: "Restore our success and profitability." Tesco installed a new management team mid-year.

Differentiating Sports and Entertainment

Not so long ago, marketers could differentiate between sports and entertainment properties fairly clearly: Sports, barring labor disputes, reliably came around every year.

There was continuity of the sport and the teams, and the players changing teams or uniforms being re-designed were just additional ways to boost the licensing side of the business. The two sectors are behaving more similarly today.

Filmed entertainment in the "licensing age," generally defined as starting with Star Wars in 1977, was a series of one-shots, with a Star Wars series, and a Batman series a few years later, exceptions.

Even then, when new episodes of films came out they were still thought of as one-off events, often with three years or more between releases, and the result was that sales would boom in a movie year, and drop off as much as 75% in a non-movie year.

There's a parallel in sports: If a team wins consecutive championships (or several times within a few years), it won't see the bump in sales that it sees the first time.

Today, successful film properties of the licensing kind are prolonged and sustained through multiple releases. Those peaks and valleys have leveled off as the studios market their sequels as just that, and as they release new "episodes" in much faster succession. Look at the film release schedule in the Nov. 17 issue of TLL with its 69 sequels due between mid-2015 and 2020 to see how prevalent this trend is, though one difference over the years is the degree to which the new sequels are based on existing source material.

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2014 Optimism Revisited

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Continuing the sports/entertainment comparison, “back then” even long-running TV series were rare long-term merchandising successes. Barney had his run, as did the Power Rangers, and others, but Sesame has been the long distance runner. Star Trek was another exception that made the rule, though it had major film support over the years as well.

Today, for TV properties, the “reboot” brings old familiar properties back to life — witness the \$750 million in retail sales of licensed merchandise the Teenage Mutant Ninja Turtles generated for Nickelodeon in 2013 in the U.S. and Canada. That may or may not have staying power; it will be interesting to monitor the success of the various Disney Junior properties that have come on so strong so quickly, including Sofia the First and Doc McStuffins. Will their sudden rise be fad-like, or will Disney turn them into franchises? Stay tuned.

With the greater continuity of successful entertainment properties, and the wider array of media on which they are exposed, entertainment properties are establishing the long-term viability of sports properties. There are ups and downs — a movie year might be the equivalent of a World Series win in some cases — but more properties are establishing longer life spans.

Finally, sports and entertainment are increasingly merging in at least one additional way: cross-licensing, with examples ranging from MLB with Hello Kitty and KISS, and NFL Players Inc., NBA, and NHL with Domo, among others in the U.S., to the Australian Football League with Sesame Street, and the 2015 Rugby World Cup with Shaun the Sheep internationally.

Non-U.S. Properties Expanding Globally

As we reported in the 8th edition of “International Licensing: A Status Report,” the proliferation of homegrown properties in literally every territory around the world creates significant competition in those territories for everyone from Calvin Klein to Hello Kitty, Disney to Coca-Cola.

Equally important, many of these homegrown properties are starting to expand globally. Typically, such expansion begins regionally (Pleasant Goat and Big Big Wolf starting life in China but expanding throughout Asia) and then beyond (Violetta originating in Argentina and moving on to success in Latin America and Europe). Similarly, the Zenit soccer team in St. Petersburg, Russia, has expanded into Europe with its licensing program.

Food/Beverage/Restaurants/Chefs

The New York Times recently renamed its weekly “Dining” section “Food.” The intention is to reflect the extended array of reporting it delivers. In licensing, too, there is a wide proliferation of interest in food and beverages: More food and beverage brands, restaurants, celebrity chefs, and others are licensing out their marks. And there is a robust expansion in the number of licensed frozen and prepared

items, wine and beer, and other food/beverage items, sometimes distributed in a variety of formats such as continuity clubs for wine licensed by Virgin, Zagat, the *Wall Street Journal*, and others.

It often seems as though there couldn’t possibly be room for another chef. Consider that Martha Stewart Living Omnimedia (MSLO) recently took a write-down in the value of the Emeril Lagasse brand while at the same time saying it will devote more resources to Emeril in the future. Yet fueled by popular TV series, the aisles at Target, Macy’s, Tesco, Carrefour, and other retailers continue to be filled with licensed cookware, the face on the package changing rapidly when a given line fails to move fast enough.

One of the more interesting aspects to monitor going forward is whether “kids as foodies” has staying power. As we reported this year, bakeware for kids is an emerging category, with Discovery building a Cake Boss Jr. line with Meyer Corp. and Moshi Monsters licensing Click Distribution for silicone molds, mixing bowls, cookie cutters, and other items. These joined more traditional on-going lines from Williams-Sonoma, Wilton, and others that are intended to appeal to kids via licensed characters such as Star Wars, Marvel, Disney Princess, Hello Kitty, and others.

Technology: Wearable and Otherwise

Wearable technology. We’re a little surprised that there haven’t been more deals yet for fitness items. Tory Burch is licensed to Fitbit, Biggest Loser to Garmin for Vivofit, Skechers to Sports Beat.

We suspect there will be more licensed fitness tracking devices at the Consumer Electronics Show in January, though this is a category where the media attention is likely greater than sales to date (let alone actual usage).

CES will also showcase wearable devices embedded into various apparel and accessories, typically tied to fitness.

Licensed ‘Devices’ and Content. Fuhu has its DreamWorks DreamTab tablet incorporating various DreamWorks properties. V-tech’s Innotab line uses cartridges under license from Warner Bros. (Scooby-Doo), Nickelodeon (Sponge-Bob), and Disney/Pixar (Cars), among others. (Ironically, the picture of the device at Toys R Us’s website features DreamWorks’ Mr. Sherman & Peabody, from that ill-fated movie.) And Leapfrog’s LeapPad features Disney, Turner, Nick, Sanrio, and other characters.

Nokia is licensing its name to Foxconn for tablets, and anticipates licensing additional devices other than handsets (Microsoft has that license through the end of 2016), and other tech companies can be expected to follow suit.

Pets: The Reality Show

The pet products business has been heralded for several years now as ready to take off, but the reality is that much of that has been wishful thinking so far. The opportunity appears to be there, but pet retailers have their own brands, and individual categories aren’t that big.

Our Store Check Surveys this year, conducted by Project

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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	Sue Perez-Jackson, Discovery Communications
Genevieve Gorder	Interior designer and HGTV talent, known for her soulful and whimsical sensibility.	home decor	Sherikay Chaffee, Beanstalk Kenneth Slotnick, AGI Lifestyle Entertainment
Precious Moments	Collection of porcelain figurine-based characters that commemorate life's moments.	baby products, back-to-school, bedding, blankets & throws, electronic accessories, maternity, pet products, toys	Sara Pilafas, Precious Moments
Redneck Riviera	Lifestyle brand by Big and Rich star John Rich espousing American values, country music, and Southern hospitality.	accessories, beach items, beverages, food, novelties	Milin Shah, Earthbound

Licenses Recently Granted, U.S.

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Ale by Alessandra	Esquire Footwear	footwear	Silver Sunrise, Cherokee Group (The)
	Oxford Ophthalmic div. Eyewear Designs	eyewear	
	Physician Endorsed	bags, hats, totes	
Ali Sabet	Kroto dba iCanvasART	canvas art	PS Not Just Another Agency B.V., Alita's Brand Bar
BeFit	Top Secret Nutrition	nutritional products	Lionsgate
Bethenny Frankel/Skinny Girl	Sensio	small kitchen appliances	CAA
Chiquita	Origin Food Group	smoothies	Beanstalk
Dominique Ansel	DMA3D/DMA Elements	cutlery, glassware, housewares, tabletop decor	Brand Central
	Lecoq Cuisine	frozen dough	
Dora the Explorer, SpongeBob SquarePants	Put Me In The Story div. Sourcebooks	books (children's), e-books (children's)	Nickelodeon & Viacom Consumer Products
Erin Smith Art	Sourcebooks	calendars	Moxie & Co.
Fabio Viviani	Sipp	wine	Joester Loria Group
Garfield	Classic Brand (The)	apparel (women's)	Bulldog Licensing
	Fright Rags	t-shirts	
	Open Road Brands	containers, decals, doormats, magnets, tin & wood products, trays, wall art	
Heineken	Garrett Leight	sunglasses	Heineken
	Parabellum	leather accessories	
	RTH	tops	
Jockey	Dream Lounge (The)	thermal apparel	Jockey Intl.
Little Battlers eXperience	Fifth Sun	activewear (boys'), hoodies (boys'), outerwear (boys'), shorts (boys'), t-shirts (boys'), tank tops (boys'), thermals (boys'), underwear (boys')	Dentsu Entertainment USA
	Trends International	posters	
	Zwyer Industries	art books	
Looney Tunes	CNK Digital	mobile educational apps	Warner Bros. Consumer Products

*Extension or renewal.

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Licensing News *Continued from page 5*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Lotta Jansdotter	CB Station	tote bags	Moxie & Co.
	Dansk	porcelain tableware	
	Kobo Candles	candles, match boxes	
	Land of Nod	baby products	
	Rizzoli International Publications	wall calendars	
Luke Bryan	Cabela's	apparel	Universal Music Nashville
Mortal Kombat	Mezco Toyz	collectibles	Warner Bros. Consumer Products
MTA New York City Transit	Edward Carlton Kutz	wooden signs	Moxie & Co.
	Flushing Map	flyers, maps	
Nash Grier, Hayes Grier, Cameron Dallas, Carter Reynolds	Aeropostale	apparel	26 Management Team
Neopets	Madefire	digital comics	JumpStart/Knowledge Adventure
Norman Thelwell	Allison & Busby Ltd.	books	Karen Addison Associates
Peppa Pig	Fiesta Toy	plush, toys	eOne Entertainment
	Primary Colors	confectionery, stationery	
	Redan Publishing	magazines	
Redneck Riviera	Acumen Brands	footwear	Earthbound
	Jay Franco & Sons	beach towels, blankets, throws	
	Penny Lane Fine Art & Licensing	wall art	
Robert Rodriguez	One Jeanswear Group div. Nine West Holdings	sportswear	Jones Group
Scripps National Spelling Bee	Calendar Holdings	calendars	Moxie & Co.
	Macmillan Publishing	books (children's)	
Shakira	Fisher-Price	baby toys, web series	Live Nation Merchandise
Sonic Boom	Archie Comic Publications	comics	SEGA of America
	Bakery Crafts/Jack Guttman	food	
	BioWorld Merchandising	apparel	
	Bulls I Toy	novelties, toys	
	Fifth Sun	apparel	
	Isaac Morris	apparel	
	TOMY	master toy	
Stan Lee	Topps	prints	POW! Entertainment
Tapatio Hot Sauce	Aquarius Entertainment Merchandising	calendars, coasters, glassware, magnets, playing cards, posters, puzzles, standees, t-shirts, tin lunch boxes, tin signs	Firefly Brand Management
	Aristocrat	slot machines	
	Fiesta Toy	amusement plush, capes, inflatable bottles	
	Frost Productions	lottery tickets	
	Hot Properties! Merchandising	air fresheners, bookmarks, bottle openers, buttons, coolers, key chains, lanyards, magnets, note pads, patches, stickers, wristbands	
	Hybrid Apparel	t-shirts	
	Poprageous	dresses, leggings, pants, skirts, swimsuits, tops	
University of Georgia	Panini America	trading cards	Fermata Partners
University of Kentucky	Panini America	trading cards	Fermata Partners
University of Miami	Panini America	trading cards	Fermata Partners
Welch's	Healthy Food Brands	dried fruit	Welch's

*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
Bally Total Fitness	Activewear brand and fitness club chain operating nationwide for over 30 years.	activewear (boys', men's) (U.S., Canada, Mexico)	John Spotts, FAM Brands
Catalina Estrada	Colombian illustrator with bold, distinct aesthetic. Previously licensed worldwide in beverages, fashion, sportswear, and more.	apparel, fashion accessories, home decor & furnishings, stationery (U.S., Canada, Mexico)	Julie Newman, Jewel Branding & Licensing
Ferne McCann	Star of U.K. reality TV series, <i>The Only Way is Essex</i> .	fashion, hair accessories, health & beauty aids (U.K.)	Saphia Maxamed, Rights Management Intl. Ltd.
Marika	Women's shape-enhancing activewear brand founded in 1982.	jeans (shaping & stretch), maternity, sweaters (U.S., Canada, Mexico)	John Spotts, FAM Brands

International Licenses Recently Granted

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Alice in Wonderland	Flame Tree Publishing	calendars (U.K.)	Walker Books
	Mary Gannon Design	furniture (children's) (U.K.)	
Bagpuss	Daredevil Development	mobile game apps (Android & iOS) (Worldwide)	Coolabi, Peahen Games
Beano (The)	N16 Vintage	outerwear, t-shirts (U.K.)	DC Thomson
DC Comics Super Heroes, Friends, Scooby Doo	Biscuiteers Baking Co.	biscuits, cakes, cupcakes (U.K. & Ireland)	Warner Bros. Consumer Products
Discovery Communications (network brands)	Princess Cruises	cruise activities (Worldwide)	Discovery Communications
Disney	Pandora Jewelry*	jewelry (U.S., Canada, Mexico, Puerto Rico, Central America, the Caribbean)	Disney Consumer Products
Disney, Marvel	Character World/TDS Enterprises	bedding (U.K.)	Walt Disney Company EMEA
Doozers	KidQuest div. LiveHive Systems	mobile educational apps (iOS) (Worldwide)	Jim Henson Company
Ferrari	LEGO Systems	construction block sets (Worldwide)	Ferrari S.p.a.
Fetch! with Ruff Ruffman, Peep and the Big Wide World	KidQuest div. LiveHive Systems	mobile educational apps (iOS) (Worldwide)	WGBH Enterprises
Frozen	Ingo Devices	electronic toys, mobile game apps, tablet accessories (Worldwide)	Disney Consumer Products
Garfield	KidQuest div. LiveHive Systems	mobile educational apps (iOS) (Worldwide)	Paws, Inc.
Guess How Much I Love You	Three Crowns Confectionery	chocolate candy (U.K.)	Walker Books
Harper's Bazaar	Marka PJSC	cafés (Middle East)	Hearst Magazines
John Wick (film)	Starbreeze AB	video game DLC (Worldwide)	Lionsgate
Julius Jr.	StoryToys	mobile game apps (iOS) (Worldwide)	Saban Brands
Mario	An Post	stamps (Ireland)	Nintendo of America
McLaren	LEGO Systems	construction block sets (Worldwide)	McLaren Automotive Ltd.
Nik Wallenda (Skyscraper Live)	Hyperpower Game Group, Tapinator	mobile game apps (Android & iOS) (Worldwide)	Discovery Communications
Pac-Man	An Post	stamps (Ireland)	Bandai Namco Games Europe
Playboy	Bendon	intimates (Worldwide)	Playboy Enterprises
	Blessed Cosmetics	cosmetics (Brazil)	
	D.R. Lingerie Industria e Comercio S.A.	intimates (men's), pajamas (men's), swimwear (women's) (Brazil)	
	JART/HLC SB Distribution, S.L	skateboard gear, skateboards (U.S., Canada, Europe, Japan, South America, ANZ)	
	Art Works Co., Ltd.	apparel	

*Extension or renewal.

Continued on page 8

Licensing News Continued from page 7

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Playboy	Santino	backpacks, bags, briefcases, luggage, purses, wallets (Brazil)	Playboy Enterprises
	Selima Optique	prescription eyewear, sunglasses (Worldwide (excluding Argentina, Bolivia, Brazil, Chile, Columbia, Ecuador, Paraguay, Peru, Uruguay, Venezuela))	
Playmobil	Electronic Sheep	hats (U.K.)	Playmobil U.S.A.
Porsche	LEGO Systems	construction block sets (Worldwide)	Porsche Cars North America
Power Rangers	Fit for Sport	fitness guides (U.K.)	Saban Brands
Sonic the Hedgehog	An Post	stamps (Ireland)	SEGA Europe
Space Invaders	An Post	stamps (Ireland)	Copyright Promotions Licensing Group (CPLG)
Ted Baker	Portmeirion Group USA	dinnerware, porcelain giftware (U.K.)	Ted Baker London
Very Hungry Caterpillar (The)	Cawston Press	juice (U.K.)	Rocket Licensing
Zomlings	Signature Publishing Ltd.	magazines (U.K.)	Magic Box Intl.

GOOD-FOR-YOU LICENSING

Fighting Obesity In the Produce Aisle

With an increasing societal focus on health and wellness and a desire to combat childhood obesity, entertainment/character licensors are interested in associating their properties with the produce category, and vice versa.

Some examples within the last year or so:

Sesame Workshop, the Produce Marketing Association, and the Partnership for a Healthier America forged a deal allowing the Sesame Street characters to be used, royalty-free, on signage and packaging.

- ▶ Eric Carle's *The Very Hungry Caterpillar* is starring in Produce for Kids' third annual Healthy Families, Helping Kids campaign, featured in Publix and Meijer stores this fall.
- ▶ Disney and Pinnacle Foods' Birds Eye brand teamed in a multiplatform effort to encourage more vegetable-eating, with Disney characters appearing on packaging, among other elements.
- ▶ The Florida Department of Citrus worked with Marvel Custom Solutions to integrate Florida's Captain Citrus character, along with Marvel's Avengers Assemble team, into a custom comic, teacher's guide, and lesson plan distributed to 1 million children in U.S. schools.

These ventures join a handful of ongoing licensing efforts in the produce aisle. Disney, to name one example, has a number of licensees for branded fruits and vegetables, including Chelan Fresh for bagged apples and cherries, Crunch Pak for fresh sliced apples, Dayka & Hackett for grapes, Freska for mangos, Naturipe for blueberry snacks, and SGS for stone fruit and table grapes, all featuring Disney and Marvel characters and brands. Warner Bros. also maintains a presence; a couple of its newer Looney Tunes licensees include Crunchies Foods for freeze-dried fruits

and vegetables and Central West Produce for packaged strawberries in the U.S. and Canada.

And the trend is not limited to North America; Viacom International just licensed South African retailer Checkers for *SpongeBob SquarePants* seasonal fruits, including in kid-sized portions.

Most of the deals mentioned above lean more toward promotion than traditional licensing, although it should be noted that there are a lot of gray areas between the two in this category.

LICENSING BY THE NUMBERS

Disney Consumer Products Revenues Expand When Frozen

Revenue at **Disney Consumer Products** (including merchandise licensing and the Disney retail stores) increased 12% to \$3.985 billion for the year ended Sept. 27, 2014, compared to the prior year. Operating income for the unit was up 22% to \$1.356 billion over the same period.

Singled out for strongest contributions to merchandise licensing for the year: *Frozen* and the new Disney Channel properties. For the quarter, performance was boosted by *Frozen* and *Spider-Man*, partially offset by lower revenues from *Monsters* and *Iron Man* merchandise.

Overall, Disney revenue was up 8% and operating income 21%. The strongest showings were in Studio Entertainment — largely attributable to the success of *Frozen* on screen and in home media — and Interactive, which was re-tooled this year and benefited from the performance of Disney Infinity console games and the mobile games *Tsum Tsum* and *Frozen Free Fall*.



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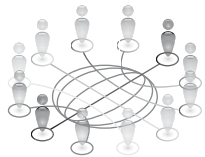
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2014 Optimism Revisited

Continued from page 4

Partners Network, revealed a strong presence for private labels in pet and general merchandise stores with pet sections. Licensing could help stores better merchandise this category in-store (U.K. and European stores do an excellent job on that front, despite the fact that the category is much less developed for licensing there than in the U.S.), while co-branding with a licensee could be vehicle for adding a health component to such offerings.

Most licensing is around apparel (sweaters) and accessories (leashes, Halloween costumes) spotlighting sports teams and entertainment characters.

Still, there are lower-profile licensed brands you might not expect, such as Burt's Bees, or Bed Head (called Pet Head in this case) that are entrenched, while some of the bigger ones (Martha Stewart) have had a harder time making inroads. We believe that brands that are extending into functional applications, such as Arm & Hammer, Body Glove, and the aforementioned Burt's Bees and Bed Head, will have staying power. This was a modest growth area in 2014.

Social Media: More Opportunities, More Competition

This is the nut everyone wants to crack, from being the first to recognize a rising social media star to harnessing social media as a marketing tool. Social media makes it easy to pinpoint targeted audiences, but the competition to reach them is so great, and attention so fragmented, that it all boils down to more opportunities, more competition.

While we have reported about fashion, home, food, comedy, and other bloggers who have extended their brands via licensing, video blogger Bethany Mota is the one breakout story this year, with her direct-to-retail at Aeropostale. Two likely indicators of the success of that deal: It was extended into additional categories, and late in the year the same chain introduced an exclusive United XXVI collection featuring teenager Nash Grier and others who are featured in his virally-popular Vine comedy videos. Beyond bloggers, other social media outlets that have potential for originating new properties are Instagram and Pinterest. Also in this realm: Target had capsules with a handful of Pinnars in the stationery/party category in 2014.

Slots and Lotteries

We admit it: While we've written (most recently in 2013) about the breadth of licensed properties that work for slot machines and lotteries, we have no sense the order of magnitude of this category. What we are hearing, however, is that the success of licensed properties for online slots is growing exponentially.

All gaming licenses are structured differently than for other consumer products, in part to comply with regulations, but also because the nature of the business itself is so different. From Hasbro's Monopoly to Act III's Three Stooges to King Features Betty Boop, this is a segment to

embrace if you can. Some agents and consultants are even carving side niches with an expertise in this area. Nor is this category limited to working with traditional pop culture icons. Tapatio Hot Sauce has been licensed to Frost Productions for lotteries.

Touring Shows, "Experiences," and Theme Parks

The number of licensed attractions (encompassing touring shows, exhibitions/"experiences," and theme parks and rides, is also growing at a very fast clip. That Feld Entertainment was able to turn its touring Disney on Ice into a *Frozen*-themed production within six months is impressive — but there was an existing show, arenas were booked, and Feld and Disney have worked together on multiple shows for years. Still, that required new costumes, new routines to new music, and more. Getting that show on the road while the movie was still hot was a not insignificant achievement.

More typical is a 2014 Lionsgate announcement for a Hunger Games touring show set to embark in 2016, licensed to Dutch company Imagine Nation and Triangular Entertainment in the U.S.; or DreamWorks licensing Shrek to Merlin for a 2015 visitor attraction in London (with five other cities to be added over nine years).

The success of Kitty-Con, a Hello Kitty festival in L.A. probably portends similar events to follow elsewhere.

Theme park attractions are being licensed to foreign operators, in particular in the Middle East and Asia, and in some cases are being developed by the licensor together with local governments. Among the projects announced in 2014:

- ▶ Ferrari Land Park at PortAventura, a resort in Salou, Spain (the first Ferrari Park opened in 2010 in UAE), licensed to private equity firms Investindustrial and KKR.
- ▶ Fox has one project in Malaysia (2016) and a second, in tandem with Village Roadshow Theme Parks and the Korean government, in Seoul (no date specified).
- ▶ Universal Beijing, with the first phase anticipated for 2019.
- ▶ Shanghai Disneyland (announced prior to this year, but slated to open in 2015).
- ▶ Shanghai DreamWorks Animation.
- ▶ Warner Bros. is working on a park for Abu Dhabi.

Meanwhile, Cartoon Network's Amazone water park, under license to Amazon Falls in Thailand, just celebrated its first anniversary.

Owning to License

When we published a financial analyst's comparison of the performance of Iconix vs. Sequential Brands in our daily e-letter, TLL Daily Advisor, it was one of the most-clicked items we've ever run. Interest in owning brands with the specific intent of licensing them is very high.

As this is written, Sequential is looking to acquire Perry Ellis International. This business model isn't panacea — not all brands work out — but when it does it is clearly very lucrative. Of course the number of brands available may be limited, and the prices will rise dramatically as

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2014 Optimism Revisited

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more companies compete for them. To date, many of the brands acquired in this fashion have either been purchased in bankruptcy, been dead brands, or are celebrity brands looking for longevity past the family's interest.

Nothing new there, but if the stock market continues its current rally (this is written mid-November), more investors will be looking to mine this business model, even as prices for acquiring go up.

Trend-Watching: Personalization and More

Personalizing jerseys and other items has been on the "trends" list for a couple of years now, but we're wondering if that may have been more a passing fad than a long-term trend. It's not that personalization has disappeared—that's not likely to happen—but that the newness factor has worn off.

Given how popular the NFL and some of the other major sports leagues have said personalization of jerseys is, it's surprising that it isn't prominent on the league or team shopping sites run by Fanatics, despite the fact that it is high profile in ads during games. Going to a site cold, you have to search the term "personalization" to find them.

It may also be that other forms of personalized interaction with licensed properties are taking root — in particular the integration of social media including Instagram and Pinterest as well as Facebook, Twitter, YouTube, blogs, and others.

We're hedging our bets here, because there appears to be growth as more properties and more platforms are involved. But if you're thinking about personalization opportunities, look around to see how much is out there. This is one where anecdotal evidence can be valuable.

Something like this could well differ from community to community.

Other trends that appear to be increasing in significance:

- ▶ **Construction sets.** LEGO's ascendancy to the top tier of toy companies, and Mattel's acquisition of Mega Bloks in 2014 suggest the toy makers anticipate continued growth in this sector. Girls are part of the mix now in terms of target audience for construction sets, and the competition for licensed properties—once the bane of LEGO, now the toy-maker's acknowledged savior—is fierce.
- ▶ **App-connected toys.** Toy Fair is coming in February; we'll see the degree to which this trend holds over from last year. It appears to be standard operating procedure to have an app in just about any toy, but often they don't add much value. We think this is still in its infancy — that no one has really discovered the "killer app/toy" that will define the segment. It will come.
- ▶ **Social responsibility.** This is particularly acute at the moment relative to colleges and universities, where students are urging administrators to demand stringent guidelines (and enforcement) for where products are manufactured and under what conditions. As with "Made In [insert your country here, because this isn't limited to the USA]," this movement isn't limited to students and schools. However, the social responsibility aspect is probably strongest in academia.
- ▶ **STEM.** Science, technology, engineering, and mathematics. The whole concept of STEM will extend well beyond classrooms and beyond properties that have a clearly delineated educational thrust, as has been the case thus far with assorted Scholastic, Nickelodeon, Genius, and other brands that are mining this territory.

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