

# TLL THE LICENSING LETTER

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## A Niche of Their Own: Touch by Alyssa Milano Is Catalyst For Fast-Growing Off-field Licensed Women's Sportswear

Women represent the most dynamic segment of the off-field sports apparel market. Women make up nearly half of all self-identified MLB fans and 44% of NFL TV viewers. More women watch the Super Bowl than the Oscars. Not surprisingly, women's interest in sports is translating into growing sales of licensed women's sports apparel. Today:

- ▶ Women are the single fastest growing segment of the market for NFL licensed products, having increased by double digits in the last five years, according to the League.
- ▶ Women account for more than 20% of NASCAR apparel sales, as compared to less than 10% a decade ago, according to a league source.
- ▶ Sales of NCAA licensed products to women have increased 148% in the past five years and 53% in the last three years, reports IMG College, whose CLC division represents schools and events accounting for about 75% of the collegiate market.
- ▶ Women account for approximately 20% of G-III's licensed off-field sports apparel market, as opposed to 5% in 2006, says the company's Kyle Sanborn. G-III is apparel licensee for Touch by Alyssa Milano, the primary off-field women's sports apparel brand.

Still more changes are in store. In 2015, Touch will expand its store-in-store and dedicated women's shops at venues, and will launch its first lines of maternity and plus-size products. And the company is considering expanding its sports apparel line to the underserved girls and youth market (G-III does not currently have those rights).

### Milano: 'I Am The Market'

At the center of the growth in licensed women's sports apparel is TV and film actress Alyssa Milano.

A decade ago, the leagues and their marketing people regarded fan dress-up as pretty much a guy thing. Ninety-five percent of officially

licensed team apparel produced was for men, leaving the female fan with a choice between oversized men's regulation jerseys that fit like a tent or the pale pink female tee that looked like something from a Pepto-Bismol bottle.

Alyssa Milano was among the frustrated and underserved female sports fans. Best known for her TV roles in *Who's the Boss* and *Charmed*, Milano recognized that women like sports and want to buy fan apparel; but they wanted more options than pink it or shrink it. "Just because it's pink doesn't make it women's," she famously said.

"I was the market," Milano tells TLL, "and nothing in the marketplace met my needs as a fan, as a woman, as a fashion-conscious shopper."

### The Launch & Growth of Touch

In 2007, Milano hired a fashion illustrator to design sports apparel with silhouettes, colors, themes and shapes that would appeal to a

*Continued on page 4*

## LICENSING BY THE NUMBERS

### More Preschool Properties Originating Outside U.S.

The \$10.6 billion worldwide preschool sector was one of the first within entertainment/character licensing in which properties originating outside the U.S. became part of global culture (see pie chart, pg. 3), according to THE LICENSING LETTER's just-published all-new 2nd edition of "The Global Market for Licensed Preschool Properties."

Because most preschoolers can't read, properties that target them are inherently more transferable across cultures than properties aimed at older, literate children or adults. One difference between U.S. and non-U.S. preschool properties is that non-U.S. properties are less likely to stress educational themes. In the U.S. nearly all preschool properties have elements

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# ➡ Licensing Ledger

## PLANES, TRAINS & AUTOMOBILES—& EVEN SHIPS

Branded transportation is a hot trend and something you may want to consider for your own travel plans, no matter where you're going or how. Recent announcements:

- ▶ **THAI Smile Airways** will roll out planes featuring Jake the Dog, Princess Bubblegum, and other characters from Cartoon Network's "Adventure Time"—both in paint on the fuselage and costumed onboard—starting in April.
- ▶ **EVA Air** flies a Hello Kitty-branded jet between Taiwan and Los Angeles and Paris, and is adding a Houston stop.
- ▶ **Great Smoky Mountain Railroad's** branded Polar Express train was slated to transport 65,000 riders this past holiday season, compared to 53,000 the prior year.
- ▶ **Toyota** is teaming up with **Nickelodeon** on a "SpongeBob Movie: Sponge Out of Water" concept car.
- ▶ **Norwegian Cruise Lines** will introduce Jimmy Buffet-inspired Margaritaville Caribbean cruises starting this fall.

## WRONG DIRECTION

Signs of trouble for musical heartthrobs and licensing megahit **One Direction**. The good news: *Four*, the album released Nov. 17, is the group's fourth in a row to enter the Billboard Top 200 Album chart at No. 1, its fourth album to debut at No. 1. The bad news: Directionality, the better indicator of licensing health, is pointing south, with sales of the new album lower than for the previous one. Licensees have been reporting lower 1D sales for the better part of a year now.

## NFL PLAYERS' \$1 B

Current NFL players represented by **NFL Players, Inc.**, the licensing and marketing division of the NFL Players Association, account for more than \$1 billion in retail sales of licensed merchandise, NFLPI's Steve Scebelo tells *Retail Merchandiser*. Overall, licensed NFL football merchandise was a \$3.2 billion business in 2013, according to "The Licensing Letter Sports Licensing Report."

## BECKHAM SCORES AGAIN

Soccer legend David Beckham and TV producer/entrepreneur Simon Fuller, who advises Beckham via his

XIX Entertainment venture in London, have signed a 50/50 agreement with **Global Brands Group** to extend Beckham's celebrity into branded apparel worldwide, with initial emphasis on Europe, Asia, and the U.S. GBG was spun off from Li & Fung earlier this year. The new venture is looking to sign additional celebrities for similar licensing deals. Beckham has a swimwear and bodywear deal with H&M, a fragrance with Coty, and other licensing and endorsement/ sponsorship agreements.

## DELIA'S GOES CHAPTER XI

Hilco and Gordon Brothers, which specialize in liquidations of bankrupt retailers and sometimes acquire such brands out of bankruptcy, will liquidate long-struggling teen retailer **Delia's**. The chain had 95 stores as of August 2nd. On Dec. 4, Delia's announced that it was filing for Chapter 11 bankruptcy protection, and warned shareholders that it "does not anticipate any value will remain."

## DISNEY EDUCATES

**Disney Publishing Worldwide**, part of the Consumer Products division, is launching Disney Imagicademy,

which combines apps, books, and "other physical products" to teach math, creative arts, science, language arts, and social and emotional skills. The first five apps for children, plus a companion parents' app, launched December 11; additional apps will roll out beginning this month while "physical products and learning toys" will be available for back-to-school 2015. It remains to be seen which products will be licensed.

## FRESH FROZEN

The tickets were moderately priced and everybody loved the show, recounted a grandmother after taking her 3- and 6-year-old granddaughters to the **Disney On Ice Frozen** show. But oh those concessions. "What a ripoff," exclaimed grandma. "\$18 for shaved ice and another \$3 if you wanted a spoon to eat it with. And the lights they tell you to flash at certain points in the show—\$26!"

## NINTENDO RELENTS

After decades of aggressively asserting its copyright, Nintendo announced that it will allow unlicensed use of its Mario Bros, Donkey Kong and other video game characters for "derivative works," i.e., works that are original but incorporate a copyrighted property as one of its elements, such as parodies, tributes, films and shows.

## RETAIL NOTES

Quiksilver has sold its majority interest in Surfdomo to SurfStitch Group. Both are online retailers specializing in action sports products. . . . Playboy added a Playboy Estd 1953 shoe store last week to the free-standing Playboy Mexico lingerie boutique it opened under the same name in August. The shoe store caters to both men and women. . . . Modell's is closing its 14,000 square foot store across the street from Grand Central Station in NY. The northeast sporting goods chain has had an outlet in that location for 25 years.



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## Preschool Properties

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of learning along with entertainment, but elsewhere, TV is not seen as the proper medium to impart a curriculum to young children. This varies by country, of course.

While many of the biggest preschool properties of the last two decades — Thomas & Friends, Bob the Builder, and Miffy, among others — originated outside the U.S., it remains difficult to become a global or near-global presence without success in the U.S. That said, some properties have enough success in their home territory and other countries that they do not need the U.S. market to become a top-20 success. Masha and the Bear is considered the top licensed property for preschoolers in Russia and, thanks to Russia’s huge population, rests in the top tier of licensed preschool properties globally, with estimated sales of \$100 million in 2013, according to TLL’s “Global Market for Licensed Preschool Properties.” It is also licensed in Europe.

For the most part, a small group of global properties, including those from media and consumer products powers such as Disney (Doc McStuffins), Viacom/Nickelodeon (Dora), and Mattel (Thomas & Friends), joined by smaller and mid-sized licensors such as eOne (Peppa Pig) or American Greetings (Strawberry Shortcake), tends to dominate store shelves consistently around the world. In each country, these global brands are displayed beside homegrown properties that are often equally popular locally.

Most of the advantages that local preschool properties have in their home market do not transfer easily to the U.S. or other territories, however. For one thing, preschool properties tend to have support from local broadcasters, especially the free TV channels that dominate children’s television in certain countries, and governments often mandate a certain percentage of local programming on preschool channels.

Increasingly, properties are created in the hopes that they will hold global appeal. For example, Iconix Entertainment

Co. of Korea developed Pororo the Little Penguin as a universal character meant to have international appeal. Its name, color scheme, and species were selected for their universality, and any traces of ethnicity and cultural specificity were left out. Even so, the property’s success outside of Asia and some other territories has been limited to date, and it has no presence in the U.S. market.

The same factors that perpetuate the top properties globally also sustain local properties within their markets. In many countries, the true classic properties beloved by parents and preschoolers are local properties that retailers and licensees know from their own childhoods. While some properties, such as the Disney characters, have been global powerhouses for generations, others that have achieved classic status in the U.S. or their home territories haven’t crossed borders until relatively recently. Therefore, they don’t have the heritage that local properties have. Conversely, local preschool properties’ appeal to both preschoolers and their parents is an attribute that does not carry over to other territories.

Occasionally, a property will launch outside its home territory first. U.S.-based Henson Productions launched The Doozers, a spin-off of its discontinued Fraggle Rock series that is targeted at young preschoolers, on Europe’s Cartoonito network (owned by Turner) in 2013. The U.S. market followed, with distribution on the online network Hulu and Simon & Schuster among the initial licensees.

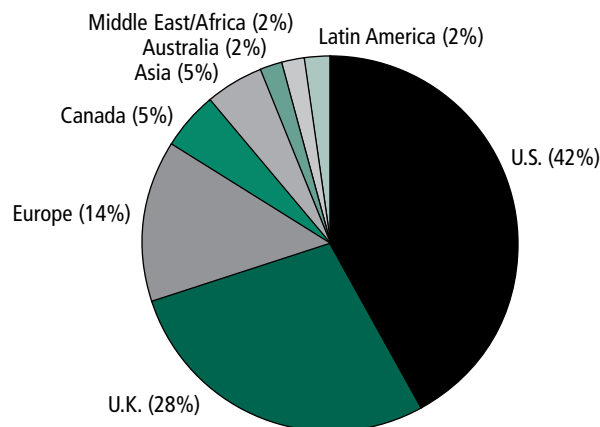
The all-new 2nd edition of “The Global Market For Preschool Properties” ranks 137 dedicated preschool properties by retail sales worldwide. The report also discusses the impact of nonpreschool properties such as Star Wars, Peanuts, Disney Princess, and others that have a strong presence in the preschool 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](http://www.epmcom.com/preschool), or call 212-941-0099.

### SELECTED NON-U.S. PRESCHOOL PROPERTIES THAT COMPETE STRONGLY IN THEIR LOCAL MARKET, 2014

PROPERTY	MARKET
Bamse og Kylling (Teddy & Chick)	Denmark
Benjamin Blümchen (Benjamin the Elephant)	Germany
Fireman Sam	U.K.
Galinha Pintadinha (Lottie Dottie Chicken)	Brazil
Masha and the Bear	Russia
Pleasant Goat and Big Big Wolf	China
Pororo the Little Penguin	South Korea
Postman Pat	U.K.

SOURCE: THE LICENSING LETTER

### PRESCHOOL PROPERTIES WITH SOME LICENSING ACTIVITY, BY GEOGRAPHIC ORIGIN



SOURCE: THE LICENSING LETTER

## A Niche of Their Own

*Continued from page 1*

female buyer. She took the concept to MLB. “I was sitting in a room with all these men from MLB Properties and they said, ‘There’s no pink,’” she recalls. “At first they didn’t get it. I explained it’s about the team colors, and they started to see the point.” MLB introduced her to the G-III Apparel Group. And so Touch by Alyssa Milano, the first sports-licensed apparel brand targeted exclusively to women, was born.

“The first year I went to every stadium for sales meetings, because they couldn’t wrap their hands around the concept. . . . And I could represent the female sports fan. Halfway through the second year, the players would ask me why they didn’t think of it!”

The initial deal was a one-year exclusive with MLB that didn’t include sales in lucrative stadium shops. (Arena and stadium sales today account for 30% of G-III’s brick & mortar sports apparel business, notes Sanborn.) The first line was sold online in 2008 under the motto “Where the game meets the after party;” it sold out in five weeks. The success caught just about everyone off guard.

It also validated Milano’s theory and established Touch’s credibility. After her exclusive with MLB ended, Touch inked deals with the NFL, NHL, NBA and some colleges. NASCAR, MLS and Minor League Baseball followed. Result: Touch is now the only women’s brand to secure licensing agreements with all of the major U.S. sports leagues. “This is a 100% fashion brand — we don’t do on-field. So we can coexist with the Nikes and Reeboks,” says Sanborn.

Today, you can buy Touch products online, as well as in sporting goods stores like Dick’s, Modell’s and Sports Authority, and department stores like Macy’s, Lord & Taylor, and Dillard’s. Fanatics, which runs most team websites across many of the major leagues, as well as its own cross-team sites, accounts for 90% of G-III’s online sales of Touch.

Through Fanatics’s vertical retail group, G-III is bringing Touch onto college campuses, as well, with 11 schools so far. Overall, bricks and mortar accounts for about 80% of sales, and online for 20% — a higher percentage than for licensed goods overall. Touch also has made contracts to sell merchandise in the stadium stores of a handful of teams, including the NY Mets, NY Jets, NY Giants, KC Chiefs, Atlanta Braves and Boston Bruins.

### Catalyst & Ignitor of Change

Touch’s success has been both a mirror and catalyst for change in the growing off-field licensed sports apparel market for women. According to Sanborn, “The women’s apparel market really took off in 2010 when the NFL launched its ‘I don’t need you anymore’ TV ad campaign.” The ads depicted women throwing their boyfriend’s NFL jerseys into their beau’s faces and donning more stylish, female-friendly versions of the same garment—to the strains of Lesley Gore’s “You Don’t Own Me” in the background. Notably, the last woman in the ad to assert her NFL jersey gender independence is Alyssa Milano.

### MILANO TOUCHES ON CHANGE

What changes has actress Alyssa Milano witnessed since the Touch by Alyssa Milano sports apparel brand for women launched in 2008?

“The business aspect of sports has changed,” she tells TLL. “Stadiums are bigger and better. Tickets are more expensive. Going to a game is more an experience — it’s not just the game but shopping and food that make it a family event. Female fans’ intelligence isn’t belittled anymore — social media has changed that for the women fans and for the leagues and their licensing departments!”

The influence of Touch extends not just to the products but to the shopping experience. “We want to make the Touch story part of the sporting event,” explains Sanborn. For example, in 2015, a Touch booth at a Super Bowl fan fest will feature not just Touch products but a Milano autograph signing. Milano was instrumental in persuading NASCAR to move away from the trailers that drivers have traditionally used to sell their goods trackside.

Starting in 2015, NASCAR will sell Touch and other licensed products from tents. “It’s a key move,” explains NASCAR official Paul Sparrow, “because we rely more heavily on event sales than do the other leagues.” It’s also a move influenced by Milano and the female buyer. “Trailers didn’t work for us because women like to handle the merchandise before buying clothes,” explains Sanborn.

Milano is excited about the prospect of more stadium shops, and of a specific stadium series of apparel and accessories that is “more about basics and t-shirts.” She says that cold weather accessories are in development. She’d “love to do handbags,” and she hopes to expand to reach kids, being the mother of two young children herself now.

“The kids’ market has been novelty onesies,” Milano says. “It should be high quality and on-trend. And for girls 4-10, whether it’s Disney Princess or Hello Kitty or sports, what makes it work is graphics on cute clothes.”

### Keeping It Pink-Less

Asked how involved she is in Touch, Milano laughs, “More involved than anyone would probably like me to be.” She credits G-III designer Marta Brandysiewicz for sharing and implementing her vision. “Marta is absolutely wonderful, and gets it.”

Licensed women’s sports apparel has come a long way since 2007. Alyssa Milano didn’t create the changes; but she saw them coming before anybody else did. Not just a prophetess, Milano was a pioneer who created the products the leagues needed to satisfy the new demands the changes generated.

At the same time, Alyssa Milano and the Touch brand she created have themselves evolved. But through it all, they have remained faithful to their principles. To this day, you won’t find anything pink under the Touch brand. “We produce clothing in the colors of the team since that’s what the real fan wants,” Sanborn says, echoing Milano’s mantra.

# Licensing News

## Properties Available Or Recently Assigned, U.S.

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
<b>Brain Games</b>	National Geographic Channel TV series featuring interactive games, illusions, and mind tricks. New season airing now.	Apparel, games, giftware, mobile apps, textiles	Debra Joester, Joester Loria Group
<b>Cooking Light</b>	U.S. women's cooking magazine with focus on healthy and fresh ingredients.	Baking & cooking supplies, beverages, food, kitchen electric appliances	Kaitlyn Curran, Earthbound
<b>Fat Fairy Tales (The)</b>	Trilogy of romance novels featuring plus-sized women, based on modern day versions of fairy tales.	All	Cathy Malatesta, Lawless Entertainment
<b>Kikkoman</b>	Most popular soy sauce brand in the U.S.	Apparel, cutlery, housewares, kitchen textiles	Ross Misher, Brand Central
<b>MillerCoors</b>	Second-largest beer company in America whose portfolio includes bestsellers Coors Light and Miller Lite, as well as craft and import brands.	Accessories, apparel, collectibles, food, home decor	Cindy Birdsong, Brand Licensing Team
<b>Rodale</b>	U.S. health and fitness magazines Men's Health, Women's Health, Prevention, Runners' World, Bicycling, and Rodale's Organic Life. One in six adults are subscribers.	Beverages, exercise equipment, food, wellness products	Michael Carlisle, Wildflower Group

## Licenses Recently Granted, U.S.

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
<b>Allrecipes</b>	Clipper	Kitchen electric appliances	Meredith Brand Licensing
<b>Christie Brinkley</b>	Atlantic Coast Media Group	Skin care products	IMG Worldwide
<b>Crayola</b>	Lulu Jr.	Book-making kits	Crayola
<b>David Tutera</b>	Your Wedding Experience	Touring wedding shows	Eda Kalkay Public Relations
<b>Death Row Records</b>	Hundreds (The)	Apparel	eOne Entertainment
<b>Dickies Girl</b>	Jerry Leigh Apparel	Apparel (juniors')	Williamson-Dickie Manufacturing
<b>Discovery Kids</b>	RMS USA	Games, toys	Big Tent Entertainment
<b>Doraemon</b>	Hot Topic	Apparel	Viz Media
<b>Got Milk?</b>	Diversified Flavor div. Diversified Consumer Goods*	Milk infusers, straws	Beanstalk
	Got Snacks?*	Snacks	
	Melville Candy*	Hot cocoa spoons	
<b>Ice Age</b>	Premier Exhibitions	Touring exhibitions	20th Century Fox Consumer Products
<b>Kathy Davis</b>	Acco Brands	Office products	Kathy Davis Studios
	Boulevard Candle div. Langley/ Empire Candle	Candles	
	Fabric Traditions	Fabrics	
	NES Jewelry	Necklaces	
	Nostalgia Home Fashions	Bedding	
	nVision Marketing	Pet beds	
	R Squared/Zrike Brands	Table decor	
<b>M&amp;M's</b>	Brainstorm Gear	Cycling jerseys	Mars Retail Group
<b>Martha Stewart</b>	Fathead	Wall decals	Martha Stewart Living Omnimedia
	MakerBot	3D printable models, 3D printers	
<b>Marvel</b>	Selk'bag	Sleeping bags	Disney Consumer Products
<b>Mass Effect</b>	Diamond Select Toys & Collectibles	Mini figures	Electronic Arts
<b>Michael Kors</b>	Fossil*	Jewelry, watches	Michael Kors
<b>Minions</b>	Cookies United div. United Baking	Cookie decoration sets, cookies	Universal Studios Partnerships & Licensing

\*Extension or renewal.

Continued on page 6

## Licensing News *Continued from page 5*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
MLB	Primal Wear	Cycling apparel	MLB Properties
Monster Jam	New Bright Industrial*	Remote-controlled vehicles	Feld Entertainment
	Wicked Cool Toys*	Plush	
My Gym at Home	My Gym Children's Fitness Center	Mobile apps	BabyFirst
Paramount Sleep brands (Back Performance, HD Super Duty, Nature's Spa, A.H. Beard)	Sound Sleep Products	Mattress foundations, mattresses	Paramount Sleep
Playboy	Goodlife Clothing/GL Concepts	Totes	Playboy Enterprises
Rocky Mountain Chocolate Factory	Maud Borup	Packaging	IMC
Secret Millionaires Club	Downtown Bookworks	Books	Genius Brands Intl.
Star Wars	Her Universe/The Araca Group	Jewelry	Disney Consumer Products
Tamar Braxton	IconStyle	Accessories, apparel	Sony Music Entertainment
Todd Parr	Whimsical-Art.com/Ven-American Trading Group	Fine art prints	SupperTime Entertainment
Uglydoll	Fathead	Wall decals	Pretty Ugly
Wild Kratts	Wicked Cool Toys*	Toys	Kratt Brothers Co., 9 Story Entertainment
Winnebago	ADCO Products	RV storage covers, windshield covers	Brandgenuity

## International Properties Available or Recently Assigned

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Baby Genius	Children's band with 500 songs and 125 music videos featuring classic nursery rhymes, learning songs, classical, holiday, and more.	CDs, digital content, DVDs (U.S., Canada)	Debbie Ries, PBS Kids
Beautyrest, Simmons	Mattress brands seeking to expand into consumer products and digital extensions.	Sleep products (North America)	Larry Seidman, Dimensional Branding Group (DBG)
Iconic Images	Photographer portfolios including Terry O'Neill, Baron Wolman, Douglas Kirkland for celebrity images such as Marilyn Monroe, Frank Sinatra, David Bowie.	All (U.K.)	Rob Corney, Bulldog Licensing
Peppa Pig	British preschool animated series starring an anthropomorphic pig and her friends in their daily adventures. Sold in over 180 territories.	All (Germany, Austria, Switzerland)	Friso de Jong, WDR Mediagroup Licensing GmbH
Sindy	British fashion doll that debuted in 1963 and has sold over 150 million units to date. Recently licensed in apparel, footwear, and toys.	Perfume, stationery, toiletries (Worldwide)	Rob Corney, Bulldog Licensing
Talking Tom & Friends	App-based property starring talking anthropomorphic animals; reached over 2 billion downloads. Film and TV series to come.	Accessories, apparel, back-to-school, games (India)	Jiggy George, Dream Theatre Pvt. Ltd.
Warner Bros.	Portfolio of classic properties, movies, and new theatrical releases.	All (North Africa)	Joseph Khalil, Pizzatoo/Servicing & Entertaining North Africa

## International Licenses Recently Granted

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Adidas	Lovable Lingerie	Lingerie (India)	Global Merchandising, S.L. div. adidas Group
Angelina Ballerina, Thomas & Friends, Mike the Knight	Caribu	Mobile book apps (iOS) (Worldwide)	HIT Entertainment (U.K.)
Battersea Dogs & Cats Home	Penguin Books Ltd.	Books (U.K.)	Battersea Dogs and Cats Home
Beano (The)	Mojang AB	Video game content (Worldwide)	DC Thomson
Care Bears	Cotillón Otero Srl	Party goods (Argentina)	Exim Licensing
	Picapau Srl	Towels (Argentina)	
	Wabro S.A.	Plush (Argentina)	

\*Extension or renewal.

*Continued on page 7*

## Licensing News *Continued from page 6*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Chuggington	Life Like Touring Australia Pty. Ltd.	Touring shows (North America)	Ludorum
Dickies	ID Overseas div. Indian Designs Exports Pvt. Ltd.	Workwear (India, Pakistan, Nepal, Bangladesh, Sri Lanka)	Williamson-Dickie Manufacturing
Disney Cars, Frozen	Cartamundi Group*	Mobile game apps (Worldwide)	Disney Consumer Products
Disney, Marvel	Del Monte Foods	Canned fruit juices, dried fruits, fresh foods, juice (MENA)	Walt Disney Company EMEA
Duck Dynasty	Activision	Mobile game apps (Worldwide)	Brandgenuity
Game of Thrones	Running Press Book Publishers	Books, mini kits (Worldwide)	HBO
Glee	KLab Inc.	Mobile game apps (Worldwide)	Fox Digital Entertainment
Hanna-Barbera, Looney Tunes	Jerry Leigh Apparel	Accessories, apparel (Worldwide)	Warner Bros. Consumer Products
Jimmy Choo	Safilo S.p.A.*	Eyewear (Worldwide)	Jimmy Choo Plc
Johnny Test	Imports Dragon	Master toy (North America)	DHX Media
Laundry by Shelli Segal	Underboss/Undergirl Productions	Intimates (U.S., Canada)	Perry Ellis Intl./PEI Licensing
Lonsdale, University of Oxford	Punch GmbH	Apparel (men's) (Germany)	Performance Brands
Mercedes-Benz Grand Prix	Hornby Hobbies	Remote-controlled vehicles (Worldwide)	Mercedes-Benz Grand Prix Ltd.
Monopoly	Cartamundi Group*	Mobile game apps (Worldwide)	Hasbro
Nelvana (Max & Ruby, Little Bear, Franklin, The Berenstain Bears)	Fingerprint Digital	Mobile entertainment platforms (Worldwide)	Corus Entertainment/Nelvana Enterprises
Nick Mayer	Nautica	Apparel (Worldwide)	Surge Licensing
Nickelodeon	Karisma Hotels & Resorts	Hotel experiences (Worldwide)	Viacom Intl. Media Networks
Paddington Bear	Dreamtex	Bedding (U.K.)	Copyrights Group (The)
	Totseat Ltd.	Highchairs (U.K.)	
Peppa Pig	Ravensburger AG	Activity books, games, puzzles (Germany)	WDR Mediagroup Licensing GmbH
	Simba Dickie Group	Construction blocks (Germany)	
	VTech Electronics Europe GmbH	Electronic learning toys (Germany)	
Pets Rock	BB Designs	Gifts (U.K.)	DRI Licensing Ltd.
	Blues Clothing	Apparel (U.K.)	
Playboy	Bendon	Intimates (Worldwide)	Playboy Enterprises
	Del Toro	Footwear (Worldwide (excluding Argentina, Asia))	
	Hysteric Glamour	Fashion accessories, shoes, socks, underwear (U.S., Japan)	
	Jessi NY	Custom jewelry, footwear, purses, scarves (women's) (South Korea, China, Hong Kong)	
	Lexdray	Accessories, bags (U.S., Japan)	
	Nowhere Co., Ltd./A Bathing Ape (BAPE)	Ceramic mugs, disposable lighters, hats, key chains, pens, sneakers, towels, underwear (men's) (Hong Kong, China & Macau (excluding lighters, ash trays, key chains))	
Puffa	Ueno-Shokai Co., Ltd./Schott	Hats, key covers, leather accessories, outerwear, patches, shirts, stickers, wallets (Japan)	Licensing Company (The)
	Flyers Group	Jackets (children's) (U.K.)	
	Topshop/Top Man div. Arcadia Group Ltd.	Jackets (U.S., U.K.)	
Roxy	Faction Collective (The)	Skis (Worldwide)	Quiksilver
Rugby Football Union	Husky Retail	Mini fridges (U.K.)	Copyright Promotions Licensing Group (CPLG)
	Premier Sports Lights	Lighting with sound (U.K.)	
Slugterra	JAKKS Pacific*	Toys (Worldwide)	Nerd Corps Entertainment
Smiley	Poetic Gem	Apparel (U.K.)	SmileyWorld
Smurfs (The)	Budge Studios	Mobile game apps (Worldwide)	Sony Pictures Consumer Products, Lafig Belgium/I.M.P.S. International Merchandising & Promotion Services
Snoop Dogg	Happy Socks	Socks (U.K.)	Cashmere Agency

\*Extension or renewal.

Continued on page 8

## Licensing News *Continued from page 7*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
<b>Sonic Boom</b>	Accessory Innovations	Back-to-school (North America)	SEGA of America
	Franco Manufacturing	Bedding ensembles (North America)	
	Howard Keys	Housewares (North America)	
	Rubie's Costume	Costumes (North America)	
	teNeues Publishing Group	Calendars (North America)	
	World Tech Toys	Remote-controlled vehicles (North America)	
<b>Sons of Anarchy</b>	Great Frog (The)	Jewelry (Worldwide)	20th Century Fox Consumer Products
<b>Suzu's Zoo</b>	Shanghai Pin Shi Fushi Co. Ltd.	Apparel (children's) (China)	Lawless Entertainment, Dina Asia Pacific
<b>Teletubbies</b>	Egmont (U.K.)	Sticker books, story books (Worldwide)	DHX Media
<b>Walking Dead (The)</b>	Parque de Atracciones de Madrid	Theme park attractions (Spain)	Striker Entertainment, Enjoy Brand Licensing
<b>Wallace &amp; Gromit</b>	Iron Gut Publishing	Fine art (U.K.)	Aardman Animations



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## FOCUS ON CHINA

### Greater China Continues to Demonstrate Rapid Growth In Licensing

Greater China—mainland China, Taiwan, Hong Kong, and Macau—has been one of the fastest-growing licensing markets within Asia and in the world over the past few years. In fact, two of the countries in Greater China, the mainland and Macau, were the first and second fastest-growing individual countries in retail sales of licensed products in 2013, with increases of 9.2% and 9.0%, respectively, according to THE LICENSING LETTER's "International Licensing: A Status Report." Given recent upward revisions of GDP growth for China, the trend is likely continuing.

Together, the countries of Greater China saw an increase of 8.3% in retail sales of licensed goods in 2013, and a two-year gain of 17.0% from 2011 to 2013. Total retail sales of licensed merchandise in Greater China in 2013 approached \$6.4 billion.

The countries within Greater China are very different from

one another when it comes in their licensing landscapes. Most notably, Taiwan and Hong Kong are better established, so per-capita sales are higher (\$21.74 and \$40.35, respectively, compared to \$4.07 for mainland China), but their greater maturity and lower populations mean growth prospects are lower.

Even as mainland China's licensing market is still considered emerging, it is already the sixth-largest single country in total retail sales of licensed goods. With \$5.5 billion in retail sales, it falls behind only the U.S., Japan, Canada, the U.K., and France in this ranking.

That said, while some licensors are doing well in the mainland, most still are dealing with a steep learning curve and the many challenges that the business faces in this market. The rest of the countries in the region, while smaller, are easier to navigate.

#### Sales by Property Type

Entertainment/character licensing drives 37% of retail sales of licensed goods in Greater China, the largest sector in

*Continued on page 11*

## Focus on China

Continued from page 10

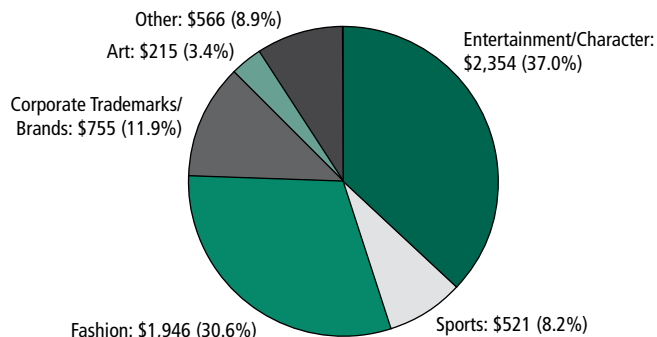
the territory, followed by fashion with a 30.6% share. The two segments were the first to be established in mainland China.

Within entertainment/character sector, properties from Disney and other major licensors in the U.S., and Japanese and European licensors, continue to maintain a strong share. Disney was one of the first U.S. studios to establish itself in this market and continues to grow, but still attributes to China a relatively small portion of sales.

Increasingly, IP from Japan, South Korea, and Greater China itself is being introduced here. Xi Yang Yang, or Pleasant Goat and Big Big Wolf, is just one property from mainland China that has made a real mark at retail, while properties from Hong Kong and Taiwan also have begun to emerge.

### RETAIL SALES OF LICENSED MERCHANDISE, GREATER CHINA, BY PROPERTY TYPE, 2013

Total = \$6.4 Billion



NOTE: Retail sales in millions of U.S. dollars. Numbers may not add up exactly due to rounding.  
SOURCE: THE LICENSING LETTER

In fashion, competition from local properties—often known only in China—is a challenge, with examples including apparel retailer Metersbonwe and outerwear brand Bosideng, among many others. But global fashion labels, especially from Europe and, to a slightly lesser degree, the U.S., continue to be in demand.

Global fashion designers frequently enter the market with their own stores. Phillips-Van Heusen licensed Dishang to operate its IZOD stores in Greater China in 2011, anticipating a total of 1,000 points of sale ultimately, including at least 500 freestanding stores as well as shop-in-shops.

Other smaller, but recently growing, property types include corporate trademarks/brands with an 11.9% share of market in 2013, sports with an 8.2% share, and art with 3.4%.

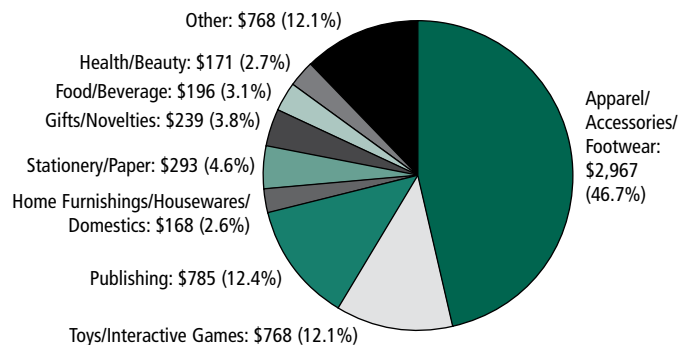
All the major property types grew at double-digit rates from 2011 to 2013 in Greater China.

### Sales by Product Category

Apparel, accessories, and footwear account for nearly half (46.7%) of all retail sales of licensed goods in the region, followed by publishing with 12.4%. The latter is sometimes

### RETAIL SALES OF LICENSED MERCHANDISE, GREATER CHINA, BY PRODUCT CATEGORY, 2013

Total = \$6.4 Billion



NOTE: Retail sales in millions of U.S. dollars. Numbers may not add up exactly due to rounding.  
SOURCE: THE LICENSING LETTER

used by foreign entertainment/character properties to gain a foothold in mainland China, both with retail books and magazines and with educational materials for schools.

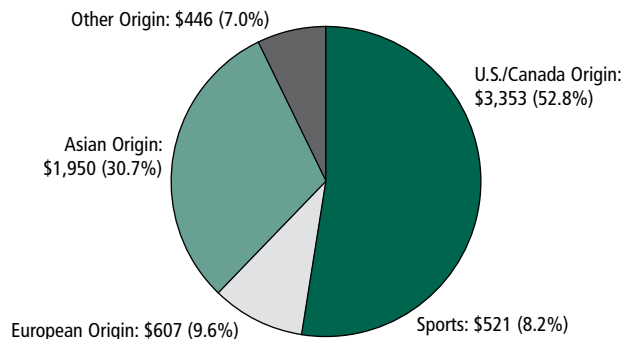
Toys and interactive games round out the top three categories, with a 12.1% share of market. But the range of licensed products and services in Greater China is vast, especially for a relatively undeveloped market. Examples range from licensed Fiat cafés in Hong Kong (location-based licensing is a growth area in general) to Hello Kitty fruit-flavored beer in the mainland. And luxury goods across all categories and property types are growing. Credit and debit cards also are popular, featuring licenses from Tom & Jerry to LINE Friends.

Every product category saw an increase in retail sales in Greater China from 2011 to 2013. Wearables, already by far the largest category, saw the fastest rate of growth by a wide margin—the sector was up 25.2% during the two-year period—another indication that this market is still emerging.

Food/beverage and health/beauty were the next fastest-growing categories, rising 15.2% and 14.2%, respectively.

### RETAIL SALES OF LICENSED MERCHANDISE, GREATER CHINA, BY GEOGRAPHIC SOURCE OF PROPERTY, 2013

Total = \$6.4 Billion



NOTE: Retail sales in millions of U.S. dollars. Numbers may not add up exactly due to rounding.  
SOURCE: THE LICENSING LETTER

ONLINE RETAIL TRENDS

Shopping By Phone: Men Do It More

Men (56%) are more likely than women (45%) to make the leap from browsing and researching purchases via smartphone to actually buying from the device, reports the Interactive Advertising Bureau (IAB). The difference is even greater among 18-34 year olds, where 76% of male smartphone users are making a purchase in a typical month, compared to 59% of women. Almost four in 10 of those 18-34s (39%) spend at least \$51 via smartphone in an average month; only 27% of overall survey respondents spent that much.

Mobile Shopping: When People Do It

Mobile shopping trends, per Opera Mediaworks:

- ▶ Day of week with highest mobile shopping rate: Sunday (followed by Monday).
- ▶ Day of week with lowest mobile shopping rate: Friday.
- ▶ Month with highest mobile shopping traffic volume—worldwide: February.
- ▶ Highest mobile traffic shopping—Asia: March.
- ▶ Highest mobile shopping traffic—Europe/U.S./Latin America: Christmas season (November through January or February, depending on country).
- ▶ Top six mobile shopping sites worldwide: Amazon (global), Flipkart (Asia), Quikr (India), OLX (India/Pakistan), Berniaga (Asia), Alibaba (China).
- ▶ Top six mobile shopping sites, U.S.: Amazon, e-bay, Craig's List, Walmart, Best Buy, Target.

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