

# TLL THE LICENSING LETTER

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## 2015 Retail Sales of Licensed Goods in U.S./Canada Top \$103 Billion; Entertainment, Sports Drive 3.4% Growth

Retail sales of licensed goods in the U.S. and Canada grew a robust 3.4% in 2015, according to *The Licensing Letter's Annual Licensing Business Survey*. At just under \$103.3 billion, total sales surpassed the \$100 billion mark for only the second time.

2015 is the fifth up year in a row for the U.S./Canada licensing business. This year's 3.4% increase not only exceeded the 2.5% growth of 2014, but overall performance of the North American economy—in 2015, U.S. GDP grew 2.4% and Canadian GDP grew 1.2%.

"Long-term, licensing is still recovering from the great recession of 2008," notes one respondent. Although this year's totals were the closest the industry has gotten to the 2008 pre-recession high of \$104.5 billion, there are strong doubts about whether the growth is sustainable. Even before the year had ended, there were ominous signs that sales had peaked. The fourth quarter was miserable for retail. "Macro-economic factors and consumer confidence that fueled growth at the start of the year were all but gone by year's end," according to one licensing agent.

The 3.4% growth figure was also deceptively high. Although most segments were up for the year, the overall increase was due largely to abnormally high growth in two segments: entertainment/character at 8% and sports at 4.8%. All other property types grew at rates below the 3.4% overall licensing industry increase, many substantially below.

### Entertainment Steals the Show

As in 2014, **entertainment/character** claimed the highest growth rate of any property type (except for the fledgling digital celebrities subcategory) at 8%. It seems hard to believe that entertainment licensing had declined every year from 2008 through 2012. That trend turned around in 2013 with 3.6% growth, followed by 6% growth in 2014.

Once again, growth in entertainment licensing was driven by Disney properties. "There's Disney and there's everyone else," says one entertainment licensor. "Disney owns half the market and the rest is pretty fragmented."

In 2014, the breakout Disney brand was *Frozen*; this year saw *Star Wars: The Force Awakens* break onto the scene. Global sales of the year's hottest property began on Sept. 4 with "Force Friday," the official marketing campaign unprecedented not only in scale but in timing, kicking off a full 15 weeks ahead of the movie premiere.

Star Wars generated more than \$700 million in retail toy sales, about one-third more than

*Continued on page 3*

### TOYS & GAMES

## Nostalgia, Tech Dominate Toy Fair

While last year's Toy Fair was dominated by *Frozen* and *Minions*, this year, there was a greater diversity of new properties as well as nostalgia-fueled reboots, re-launches and spin-offs. Technology-enhanced play and STEAM (if last year the buzz word was STEM, now arts & design have joined science, technology, engineering and math) have become increasingly prominent. And after years of slumping sales, licensed girl's toys are fighting for a comeback with a wider range of SKUs and brands.

The most popular offerings fell along two lines: tech-enabled (electronics, toys with tech elements such as flashing lights or voice control or connected to mobile apps) or strictly old-school (construction sets, wood or paper toys with a twist). And some bridged the gap, as classic toy brands underwent a modern make-over.

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# ➡ Licensing Ledger

## NINTENDO NY RE-OPENS WITH NEW MERCH, GAMES

The newly branded Nintendo New York store re-opened Feb. 19th with a new 15-foot gaming screen, exclusive merchandise and appearances by Mario, Luigi and Charles Martinet. The two-floor space has been redesigned with events in mind; the location boasts larger, open spaces and merchandise on movable displays. David Young of Nintendo confirmed that the company intends to get deeper into the licensing game, with a greater diversity and breadth of merchandise available to fans in conjunction with events to be held at the store, including game launches and gaming tournament events. As for merchandising, the company is banking on nostalgic love for its classic video game brands. Major licensee partners for The Legend of Zelda, Super Mario, Pokémon and Animal Crossing were out in full force on shelves, including Jakks Pacific (toys, games, figures), Bioworld Merchandise (apparel, accessories, sleepwear), USAopoly (puzzles), LEGO (construction sets), Sporting Apparel Co. (apparel), San-Ei Co. (plush) and PEZ Candy (candy, novelties). Small figures and toys for Skylander and Disney properties—Star Wars, Inside Out, Frozen and Mickey & Minnie Mouse—were also on display. And although Hasbro launched a side range of merch for Yo-Kai Watch (see pg. 8), Nintendo NY is taking a more cautious approach with comic books from Viz Media and its 3DS game the only options for fans.

## FIREARMS MANUFACTURERS MOVE OUTDOORS

Even as gun sales are rebounding for the first time in years, firearms manufacturers are developing hunting and other outdoor brands to avoid pressure from tightening regulations and extreme sales cycles. Smith & Wesson became the second publicly owned firearms manufacturer to seek out brands in the outdoor recreation industry—the first was Vista Outdoor. The trend is driven by a growing crossover of consumers between the sports enthusiast and hunting markets. Big-box retailers such as Bass Pro Shops, Cabela's, Gander Mountain and Sportsman's Warehouse have been expanding their offerings to meet the demands of an increasingly diversified audience.

## BIG FASHION LICENSORS TAKING BACK CONTROL OF THEIR BRANDS

The licensing model is one fashion trend that's unlikely to go out of style. But a growing number of fashion licensors—especially the bigger houses—are bucking the trend and taking back direct control of their brands. The most recent example is Puig, the Barcelona-based beauty company and owner of Jean Paul Gaultier

fragrances, which ended its licensing deal with Shiseido and fully integrated JPG into its portfolio of owned brands.

Other fashion licensors that have recently brought licensed products in-house:

- ▶ French luxury group Kering terminated Gucci and created a new in-house eyewear division to control its Luxury and Sport & Lifestyle brands;
- ▶ Ashley and Mary-Kate Olsen ended their license with Jaya Apparel Group and brought their Elizabeth & James fashion brand in-house; and
- ▶ Pharrell Williams repurchased Iconix Brands Group's interest in BBC Ice Cream LLC, owner of the Billionaire Boys Club and Ice Cream brands.

## BRINGING CELEBS HOME

Rachael Ray announced her collaboration with Legacy Classic and Craftmaster Furniture on a new upholstered furniture and case-goods collection. Of course, celebrity cook-licensed home furnishings is nothing new; what makes this collection, which debuts in the spring, different is its scope and volume. This isn't just the kitchen and

dinnerware line you usually associate with celebrity cooks, notes Kerry Glasser, head of Concept Marketing Group. The offering includes 100 pieces of bedroom, dining room and accent furniture and about 30 pieces of upholstery.

Rachael Ray is trying to parlay her cooking cred into a lifestyle brand that reaches beyond the kitchen and into every room of the house. Although stars like Gwyneth Paltrow and Ellen DeGeneres have pulled it off, it's a risky strategy that doesn't always work. "The home furnishings market is already crowded with celebrity products," says Glasser. "And celebrity doesn't necessarily translate into success. It comes down to execution," Glasser notes.

The Elvis Presley Furniture collection from Vaughn-Bassett serves as a cautionary tale. The line opened with great fanfare in April 2002. Alas, the blue suede sofa, sandblasted glass fronts inscribed with Elvis's signature and other Graceland-inspired touches of dubious taste, failed to resonate with the public and the line closed six months later without making it to a second run.

## EXPANSIONS

- ▶ Rovio Entertainment has created a new affiliate company, Kaiken Publishing, which will build on the gaming studio's current book business.
- ▶ G-III Apparel Group has taken a 19% stake in Karl Lagerfeld Group.
- ▶ Mattel has acquired almost all the assets of tech company Fuhu, creator of the Nabi kids' tablet, and completed its acquisition of Sproutling, which makes health wearables for babies. Meanwhile, the firm has reportedly been in talks with Hasbro for a possible merger.
- ▶ VTech Holdings and LeapFrog Enterprises have entered into a merger agreement, which will result in VTech acquiring LeapFrog.



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THE LICENSING LETTER (ISSN: 8755-6235) is published 12 times a year by 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 randy@plainlanguagemedia.com or 201-747-3737 for details.

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## 2015 Retail Sales of Licensed Goods

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*Frozen* in 2014, according to NPD Group. But the force of Star Wars wasn't limited to the usual product categories for blockbuster movies; it spanned beyond toys, video games, apparel and gifts/novelties to everything from shower curtains and duct tape to fresh produce. Analysts, including Tim Nollen of Macquarie Securities, predict Star Wars merchandise sales will reach \$5 billion in the first full year, surpassing the \$3 billion high for first year sales set by *Cars 2* in 2011-12. (See related story, page 22).

But like *Frozen*, Star Wars was a double-edged sword—or light saber—expanding the market for entertainment licensed goods but also taking share from other brands. “It was hard to get anything besides Star Wars on shelf,” says one agent. “Anything that did get on wouldn't be taken very deep.”

Star Wars was just one of the mega-properties that dominated entertainment/character licensing in 2015. “It's been a really big year for big entertainment brands,” said one licensor. *Frozen* continued its 2014 momentum. Other big sellers in 2015 included Minions and *Avengers: Age of Ultron*, as well as non-movie properties such as Teenage Mutant Ninja Turtles, Paw Patrol and DinoTrux. “Because entertainment is working so well, people are chasing dollars in it,” according to a licensing consultant. However, the success of the mega-properties “is making it harder for other brands.”

### Sports Thrives in Non-Olympics Year

For the second year in a row, **sports** was the next strongest property type, growing at 4.8%. At just under \$14.8 billion, sports accounted for 14.3% of all U.S./Canada retail sales of licensed goods.

As usual, the NFL and NBA led the way, posting strong sales in soft lines, hard lines and multimedia. But this year, other leagues joined the party. After a flattish 2014, Major League Baseball had a banner year thanks to an influx of dynamic new rookies, including the Cubs' Kris Bryant who topped all MLB jersey sales, and the newfound post-season success of popular teams like the Cubs, New York Mets, Toronto Blue Jays, not to mention last year's darling, the Kansas City Royals. NASCAR also roared back to life after two consecutive down years thanks in part to a new track-side retail model.

The NHL and PGA TOUR remained solid. And MLS, which has posted double-digit growth every year since 2004, did even better in 2015 due to new expansion clubs in New York and Orlando.

### Fashion Grows Third Fastest

**Fashion** grew 3.1%, above GDP but below 2014's 3.4% growth. Fashion licensing remains robust, totaling \$20.9 billion, or 20.3% of the market in 2015, second only to But while consumer demand remains high, fashion is wrestling

**“THE STIGMA OF SELLING AT OFF-PRICE IS GONE. THE CHALLENGE NOW IS TO AVOID RELYING TOO HEAVILY ON OFF-PRICE SALES.”**

with the same structural changes affecting other segments of the licensing industry. One problem is product glut. Technology and social media have made it easy for newcomers, including models, reality TV stars, YouTube sensations, Hollywood stylists, athletes and other celebrities to launch their own lifestyle labels. But even as properties multiply, shelf space to accommodate them shrinks—especially within the department and specialty stores that have been fashion's traditional retail domain.

All of this has forced established brands to turn to mass and value stores. Notable 2015 examples include exclusive limited edition fashion lines from high-end labels such as Lily Pulitzer for Target and Balmain for H&M. “The stigma of selling at off-price is gone,” notes a licensor. “The challenge now is to avoid relying too heavily on off-price sales.” Or, as one consultant explains, “licensors need to strike a balance between off-price revenue and preserving the integrity of their brands.”

### Performance of Other Property Types

The mammoth **corporate/trademark** category generated \$27.6 billion in 2015 sales to make up 26.8% of the total U.S./Canada market. The 3.0% growth rate was the property type's highest since 2012 (and 50% above the 2.0% growth posted in 2014). All corporate property types were up (except for “other”), with three exceeding the 3.4% total licensing industry growth rate:

- ▶ Food/beverage (the largest property type in the segment at \$7.5 billion) at 4.3%;
- ▶ Hardware/appliance/tool at 3.6% (\$2.8 billion); and
- ▶ Electronics/technology at 3.5% (\$3.2 billion).

At 2.5%, growth of **traditional toys/games** was slightly down from 2.8% in 2014. The mega-success of entertainment/character properties took sales from products based on traditional toy properties. But *Survey* respondents pointed to success stories, including My Little Pony (Hasbro) and the comeback of Barbie (Mattel) which kept overall growth at a positive.

**Celebrities** was the only other property type to outperform GDP, growing 2.5%. Although it is the smallest, accounting for just \$971 million of the segment's \$5.6 billion in sales, digital celebrities is the fastest growing subcategory. *TLL* expects the 8% growth rate to accelerate in the next two to three years as the gestation period ends and the new digital celebrity deals signed in 2015 come to fruition as actual product sales. In contrast to the dynamic digital property type, entertainers/models, the largest at nearly \$2.6 billion, grew at a more modest 1.8% clip. Chef/

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home celebrity properties are plateauing following 2014's 1.0% growth with an almost equally lackluster 1.1% in 2015. "The market is saturated and the whole home chef thing seems to be getting very tired," opines a licensing agent.

**Flatliners & Decliners**

After declining 2.5% in 2014, **collegiate** rebounded with 2.3% growth. One major factor: The August 2014 ruling in the Ed O'Bannon lawsuit against the NCAA and its video game licensee EA Sports effectively forced colleges out of video game licensing. But while 2014 was a down year, collegiate more than made up for losses in 2015 thanks to strong soft and hard lines sales, especially in the second half.

**Music** fell 1.7% in 2015. Although better than the 2.5% decline of 2014, the property type is still trending down. Reasons include increased competition from entertainment properties, particularly in mass and young men's retailers. "A couple of movie properties captured the consumer, including Star Wars and Minions," says one music licensing agent. Another agent explains that in 2015, pop culture in general and superheroes in particular commanded retail space that might have otherwise gone to music brands.

Another big problem for music was the decline of licensing dynamo One Direction. "1D is dead at retail," comments one agent. So far, at least, no new acts have emerged to fill 1D's stylish shoes—although there has been an uptick in interest in pop-punk and alternative acts, such as 5 Seconds of Summer. Classic rock also maintained its evergreen fashion appeal, particularly in junior apparel, where multiple *Survey* respondents said new t-shirt styles and designs kept sales brisk in specialty and boutique/independent stores, as well as some mass and mid-tier retailers.

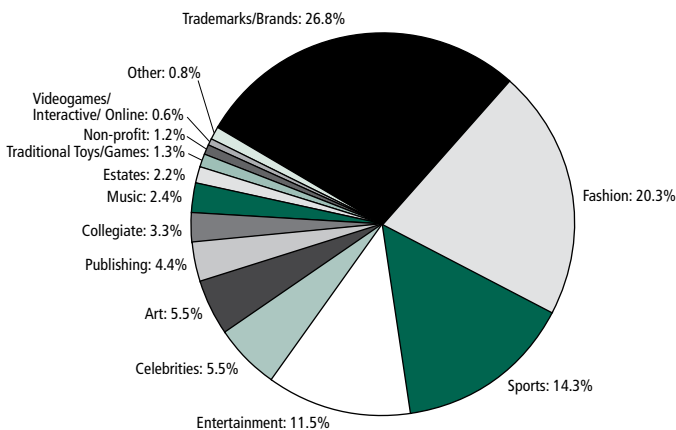
Other property types were largely flat in 2015, including:

- ▶ **Publishing** grew 1.0%, at a slight lower rate than in 2014 (1.7%). Like last year, books declined and newspapers/magazines grew, albeit at a slower clip of 1.8%

**RETAIL SALES OF LICENSED MERCHANDISE, BY PROPERTY TYPE, U.S./CANADA, 2014-2015 (FIGURES IN MILLIONS)**

PROPERTY TYPE	RETAIL SALES, 2015	RETAIL SALES, 2014	CHANGE, 2014-2015	SHARE OF MARKET, 2015
Art	\$5,665	\$5,548	2.1%	5.5%
<i>Art and Artists</i>	\$4,226	\$4,147	1.9%	4.1%
<i>Museums</i>	\$1,438	\$1,401	2.7%	1.4%
Celebrities	\$5,682	\$5,541	2.5%	5.5%
<i>Entertainers/Models</i>	\$2,585	\$2,540	1.8%	2.5%
<i>Chefs/Home-Related</i>	\$2,126	\$2,103	1.1%	2.1%
<i>Digital/Other</i>	\$971	\$899	8.0%	0.9%
Collegiate	\$3,422	\$3,345	2.3%	3.3%
Entertainment	\$11,878	\$10,998	8.0%	11.5%
Estates	\$2,271	\$2,251	0.9%	2.2%
Fashion	\$20,942	\$20,316	3.1%	20.3%
<i>Apparel</i>	\$17,795	\$17,277	3.0%	17.2%
<i>Footwear</i>	\$2,480	\$2,393	3.6%	2.4%
<i>Home</i>	\$668	\$646	3.4%	0.6%
Music	\$2,450	\$2,492	-1.7%	2.4%
Non-profit	\$1,251	\$1,258	-0.5%	1.2%
Publishing	\$4,505	\$4,460	1.0%	4.4%
<i>Books</i>	\$487	\$500	-2.5%	0.5%
<i>Newspapers/Magazines</i>	\$2,763	\$2,714	1.8%	2.7%
<i>Comic Books/Strips</i>	\$1,255	\$1,247	0.7%	1.2%
Sports	\$14,786	\$14,109	4.8%	14.3%
Trademarks/Brands	\$27,645	\$26,850	3.0%	26.8%
<i>Automotive/Motor Vehicle</i>	\$4,139	\$4,018	3.0%	4.0%
<i>Food/Beverage</i>	\$7,595	\$7,268	4.5%	7.4%
<i>Restaurants</i>	\$4,625	\$4,557	1.5%	4.5%
<i>Sporting Goods</i>	\$1,324	\$1,317	0.5%	1.3%
<i>Hardware, Appliance &amp; Tool</i>	\$2,820	\$2,722	3.6%	2.7%
<i>Home-related</i>	\$387	\$378	2.4%	0.4%
<i>Electronics/Technology</i>	\$3,234	\$3,125	3.5%	3.1%
<i>Electronic Media</i>	\$221	\$216	2.0%	0.2%
<i>Other</i>	\$3,301	\$3,249	1.6%	3.2%
Traditional Toys/Games	\$1,384	\$1,350	2.5%	1.3%
Video games/Interactive/Online	\$586	\$574	2.0%	0.6%
Other	\$809	\$773	4.6%	0.8%
<b>TOTAL</b>	<b>\$103,276</b>	<b>\$99,865</b>	<b>3.4%</b>	<b>100.00%</b>

**RETAIL SALES OF LICENSED MERCHANDISE, BY PROPERTY TYPE, U.S./CANADA, 2015**



NOTE: Numbers may not add up exactly due to rounding.  
SOURCE: THE LICENSING LETTER

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versus 3.5% in 2014. The category’s flat rates can be attributed to greater competition from entertainment/character brands.

- ▶ After a 1.6% decline in 2014, **art** grew by 2.1%. “Strong performance of commercial art properties made up for sluggish sales on the fine arts side,” according to one consultant.
- ▶ **Estates**, which continues to yoyo from year to year, finished 2015 up 0.9% after dropping 1% in 2014 and gaining 1.3% in 2013. Among properties such as Marilyn Monroe and Bob Marley that experience large swings in popularity there is one bright spot: “John Wayne just keeps chugging along,” according to a licensee executive.
- ▶ **Video games/software** turned a 2014 loss of 4% into a 2% gain last year. The category has begun to recover from the sharp decline caused by Angry Birds, which made up the bulk of sales in the sector. Growth came from the resurgence of classic properties such as Sonic the Hedgehog, Tetris and Capcom, the continued activity of franchises such as Halo and Call of Duty (which have the largest esports tournaments) and newcomers such as Minecraft.

### Toys/Games, Food/Beverage & Apparel Lead Growth on Products Side

For the second straight year, toys/games was the fastest growing product category, posting an 8.1% increase. Growth in toys has mirrored (and fed off of) the success of the entertainment/character property type over the past three years.

GROWTH IN RETAIL SALES, BY PRODUCT CATEGORY, U.S./CANADA, 2013–2015		
YEAR	ENTERTAINMENT/CHARACTER	TOYS/GAMES
2013	3.6%	3.2%
2014	6.0%	7.0%
2015	8.0%	8.1%

SOURCE: THE LICENSING LETTER

As in 2013 and 2014, connection to “A-list” entertainment properties such as *Frozen*, *Star Wars* and *Minions* drove growth in the toy industry. According to NPD Group, while overall toy sales for the year were up 6.7%, movie-licensed toys, led by *Star Wars*, significantly outperformed the overall market with 9.4% growth. And it wasn’t just *movies*. Impetus for growth came from entertainment/character properties in other media including TV (*Paw Patrol*), video games/software (*Minecraft*) and YouTube (*Shopkins*).

**Food/beverage** product sales increased for the sixth year in a row. The 6.7% gain was the second highest of any product category, and even better than 2014’s 6.0% growth rate. The category is unusual in that retail opportunities are expanding rather than contracting, with distribution

## SURVEY METHODOLOGY

TLL’s estimate of the size of the licensing business is based on its online survey of global licensing executives, conducted in January 2016; third-party research of overall category and industry size; dozens of in-depth interviews with licensing executives, both for the survey and throughout the year; annual reports and other corporate information from retailers, licensors and licensees; and news articles from trade publications covering trends in the respective product categories and property types affected by licensing.

Experts interviewed included licensors, manufacturers, agents and retailers, as well as consultants, allied professionals and individuals with multiple roles. They were based in all territories around the globe; but for this portion of the Survey which focuses only on the U.S. and Canada, results are based only on responses of those doing business in those territories.

More results from *TLL’s Annual Licensing Business Survey* will be forthcoming in future issues, including trends in royalty rates and payment structures, distribution trends and product category results by key property types for U.S. and Canada, as well as coverage of the size of the global licensing business and trends in territories outside the U.S. and Canada.

channels such as gas stations and drug stores eager to expand their food and beverage offerings. And as one agent put it, “once brands are in the aisle, they don’t leave.”

**Apparel** sales rose 6.6% largely on the strength of sports- and fashion-based properties. The former influenced not just jerseys, the traditional cash cow, but also off-field apparel. As has become customary, the women’s segment grew the fastest. “Women’s pro sports apparel is no longer a sideshow,” explains a licensor. In addition to stalwarts such as G-III’s *Touch* by Alyssa Milano, the leagues are enlisting well known women’s fashion labels like *Victoria’s Secret* and *Dooney & Bourke*. Fashion labels also spurred growth in apparel sales, especially active wear. The hot fashion trend in 2015, athleisure, was tailor-made for licensing, as exemplified by *StellaSport*, the collaboration between *Stella McCartney* and *Adidas* on a line of low-price fashionable athletic apparel for young women that debuted in January.

**Accessories**, the second largest product category behind apparel, grew a sluggish 1.8%. Licensed handbag sales actually declined (-1%). And if it were not for wearable technology such as *Apple Watch* *Hermès*, jewelry and watches would have fallen too. “It was another bad year for fine jewelry,” laments one consultant. The silver lining was eyewear, the largest accessory subcategory (\$4.7 billion), which grew 3.6%. The other accessory product categories were flat or down, including hosiery (2.5%), headwear (2.4%), luggage (1.7%) and scarves/ties (-1.6%).

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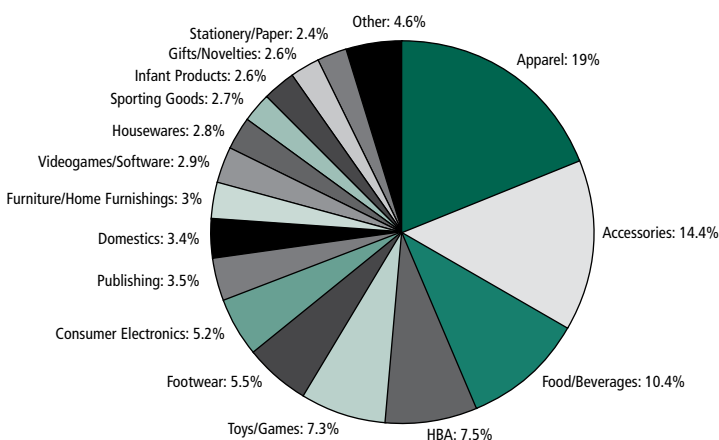
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### Performance of Other Product Categories

Five other product categories met or exceeded the lofty 3.4% industry-wide growth total:

- ▶ **Sporting goods** grew 3.8%.
- ▶ **Footwear** increased 3.7%. It was a good year for both athletic and fashion licensed footwear. “The casual workplace and demand for comfort without compromising looks is making footwear a key wardrobe element,” explains one fashion licensor. The numbers would have been even better but for the warm weather in the fourth quarter that suppressed sales of boots and other winter footwear.
- ▶ **Consumer electronics** was up 3.5%, after posting a 3.0% gain in 2014. The category includes smart watches, which are dominated by fashion brands in the high-end market and entertainment/media brands in the low-end. And electronics companies are increasingly shifting their revenue model to rely on royalties rather than manufacturing product in-house.
- ▶ **Publishing** products kept up steady growth at 3.4% with activity from new licenses, particularly from digital celebrities and entertainment/media, keeping the category kicking.
- ▶ The relatively tiny **pet products** category (\$421 million) grew 4.8% after falling 2% in 2014. Demand for premium pet products and services, including toys and other products licensed from fashion, entertainment and celebrity properties, has grown as pet parents seek to share their favorite brands with their pets. And while large chains have dominated A-list licenses (think Star Wars for Petco and Martha Stewart for PetSmart) for exclusive deals, there was a lot of opportunity for smaller brands.

**RETAIL SALES OF LICENSED MERCHANDISE, BY PRODUCT CATEGORY, 2014, U.S./CANADA**



NOTE: Numbers may not add up exactly due to rounding.  
SOURCE: THE LICENSING LETTER

The various home-related product categories posted more modest gains, including (in order of market size):

**RETAIL SALES OF LICENSED MERCHANDISE, BY PRODUCT CATEGORY, U.S./CANADA, 2014-2015 (FIGURES IN MILLIONS)**

PRODUCT CATEGORY	RETAIL SALES, 2015	RETAIL SALES, 2014	CHANGE, 2014-2015	SHARE OF MARKET, 2015
Accessories	\$14,913	\$14,656	1.8%	14.4%
Eyewear	\$4,748	\$4,583	3.6%	4.6%
Handbags, Backpacks, Messenger Bags	\$2,050	\$2,071	-1.0%	2.0%
Headwear	\$1,378	\$1,345	2.4%	1.3%
Hosiery	\$578	\$564	2.5%	0.6%
Jewelry and Watches	\$3,494	\$3,459	1.0%	3.4%
Luggage and Travel Accessories	\$1,447	\$1,423	1.7%	1.4%
Scarves and Ties	\$154	\$156	-1.6%	0.1%
Other	\$1,066	\$1,055	1.0%	1.0%
Apparel	\$19,626	\$18,411	6.6%	19.0%
Consumer Electronics	\$5,415	\$5,232	3.5%	5.2%
Domestics	\$3,480	\$3,409	2.1%	3.4%
Food/Beverages	\$10,783	\$10,106	6.7%	10.4%
Footwear	\$5,672	\$5,469	3.7%	5.5%
Furniture/Home Furnishings	\$3,111	\$3,035	2.5%	3.0%
Gifts/Novelties	\$2,692	\$2,804	-4.0%	2.6%
HBA	\$7,767	\$7,756	0.1%	7.5%
Franchise	\$4,002	\$4,051	-1.2%	3.9%
Hair Accessories	\$264	\$267	-1.0%	0.3%
Cosmetics/Nail Polish/Other	\$3,500	\$3,438	1.8%	3.4%
Housewares	\$2,869	\$2,827	1.5%	2.8%
Infant Products	\$2,703	\$2,690	0.5%	2.6%
Publishing	\$3,648	\$3,528	3.4%	3.5%
Sporting Goods	\$2,826	\$2,723	3.8%	2.7%
Stationery/Paper	\$2,446	\$2,526	-3.2%	2.4%
Toys/Games	\$7,530	\$6,965	8.1%	7.3%
Video games/Software	\$3,003	\$2,930	2.5%	2.9%
Other	\$4,792	\$4,798	-0.1%	4.6%
Hardware and Paint	\$322	\$313	3.0%	0.3%
Gardening	\$226	\$221	2.0%	0.2%
Pet Products	\$421	\$402	4.8%	0.4%
Funerary	\$9	\$9	1.0%	0.0%
Automotive Accessories	\$384	\$372	3.2%	0.4%
Boats and Vehicles	\$521	\$519	0.5%	0.5%
Other	\$2,909	\$2,962	-1.8%	2.8%
<b>TOTAL</b>	<b>\$103,276</b>	<b>\$99,865</b>	<b>3.4%</b>	<b>100.00%</b>

Note: Numbers may not add up exactly due to rounding.  
SOURCE: THE LICENSING LETTER

- ▶ Domestic (\$3.4 billion) grew 2.1%;
- ▶ Furniture/home furnishings (\$3.1 billion) increased 2.5%;
- ▶ Housewares (\$2.8 billion) was up 1.5%;
- ▶ Hardware & paint (\$322 million) rose 3%; and
- ▶ Gardening (\$226 million) grew 2%.

Meanwhile, product categories in long-term decline continued their freefall in 2015, including **gifts/novelties** which had its fifth down year in a row. The 4% decrease was the biggest of any product categories. “Low consumer confidence and the decline of foot traffic in shopping malls are killing the gifts sector,” explains a retailer. “People are still buying on impulse, they’re just doing it online,” a consultant suggests.

**Stationery/paper** continued to struggle (-3.2%). Technology has dealt the paper industry a dual blow by rendering its product and distribution channel all but obsolete. A veteran licensing agent sums it up glumly: “People don’t need paper cards anymore; and they don’t need stationery stores to get the paper goods they do need.”

There was, however, one product category that managed to arrest its downward spiral. After four years of steep decline, including last year’s 8% loss, **video games/software** bounced back by posting a 2.5% increase, amid strong demand for games for eighth generation consoles such as Sony’s PlayStation 4, Microsoft’s Xbox One and Nintendo’s Wii U and a growing market for mobile games.

### Tempered Optimism for 2016

*Survey* respondents reporting that their U.S./Canada licensing business grew in 2015 outnumbered those reporting declines nearly 3 to 1. When you add the “flats” to the “down” total, the ratio was 2 to 1 in favor of positive growth.

However, while 2015 seems to have been a good year for most, *Survey* respondents weren’t as optimistic as usual about the future. Only 56% said they thought that their business would grow in 2016, as opposed to 75% who predicted growth from last year. But among the optimists, nearly 66% predicted that growth would exceed 10%. Among the pessimists, 66% said they expected sales to be flat next year; the rest said they thought 2016 would be a down year.

## CELEBRITY

### Freshness Eludes Celebrity Scents

Despite a small rush of celebrity-licensed fragrances introduced to retail in the late summer and fall, the category still smells off, with marketers Elizabeth Arden, Coty and Parlux all reporting recent sales declines as a result of soft demand for mass market scents.

Elizabeth Arden reported earlier this month that sales for its fiscal second quarter, ended Dec. 31, fell 5.2%. While sales of Elizabeth Arden branded products increased, sales of non-Arden brands, which include designer and celebrity fragrances, were off 4% on an adjusted basis. With designer brands, including John Varvatos and Juicy Couture, posting 7% growth in the first half, that means celeb fragrances fell off pretty steeply to get to a net 4% decline. Not good news for Arden celebrity properties Justin Bieber, Mariah Carey, Nicki Minaj and Taylor Swift.

The story was similar at Coty, where sales for the quarter ending Dec. 31 were off 4%, and even worse at Parlux Brands parent Perfumania Holdings, which reported sales down 22% for the quarter ended Oct. 31, the most recent financial data available. Not good news for Paris Hilton, Pitbull, Rihanna and Sofia Vergara, all of whom introduced new licensed fragrances through Parlux last year.

“While our fragrance portfolio has been impacted by the decline in consumer interest in celebrity fragrances, we intend to shift our fragrance offering mix from a celebrity-centric offering to a more designer-based fragrance and brand portfolio,” Perfumania President-CEO Michale Katz said in a statement. “Designer and heritage fragrances tend to be higher-end and stay in fashion longer because there is a more direct link between them and a fragrance, as well as a consistency with the brand’s other offerings such as

clothes and accessories, leading to greater overall credibility with consumers.”

Not all celebrity fragrance licenses are suffering, however. Katz made a point of noting his company’s success with the Jessica Simpson line, and Luxe Brands just brought to market a second Ariana Grande fragrance less than six months after her first. Elizabeth Arden this year has invested in new fragrances from Britney Spears and Elizabeth Taylor, which it counts among its heritage, rather than celebrity, offerings.

Coty’s NYC New York Color brand, meanwhile, just introduced a licensed makeup line from Demi Lovato called Lovatics. Makeup drove beauty products growth in 2015, according to The NPD Group, outperforming fragrance and skincare in both the prestige and mass markets.

#### NEW CELEBRITY LICENSED FRAGRANCES, 2016

CELEBRITY	FRAGRANCE	RELEASED	LICENSED BY
Ariana Grande	Frankie	Jan. 2016 (Limited Ed.)	Luxe Brands
Britney Spears	Mauï Fantasy	Jan. 2016 (Limited Ed.)	Elizabeth Arden
Elizabeth Taylor	White Diamonds Night	Jan. 2016	Elizabeth Arden
David Beckham	Aqua Classic	Jan. 2016	Coty
Sarah Jessica Parker	SJP NYC	Jan. 2016 (relaunch)	Coty
	Sheer Lovely	Jan. 2016 (relaunch)	Coty
Michael Buble	TBD	Jun. 2016	Fragrance Dynamics

SOURCE: THE LICENSING LETTER

## Nostalgia, Tech Dominate Toy Fair

Continued from page 1

### Nostalgia-Driven Merchandising

Superhero properties were everywhere, with *Batman v Superman: Dawn of Justice*, *Captain America: Civil War* and Marvel's Avengers on every possible range of product, from plush to cups to drones. And after campaigns such as 'Where's Rey?' there was a conscious effort not to leave Wonder Woman out of merchandising for *Batman v Superman*. Girl-powered properties such as *DC Super Hero Girls* and *Miraculous: Tales of Ladybug & Cat Noir* graced action figures as well as fashion dolls. Bandai is focusing on hands-on play for *Miraculous: Tales of Ladybug & Cat Noir* with action figures and role play to hit retail this spring.

The next biggest presence? Turtles. Not to be outdone by Hasbro and Mattel's extensive range of play sets, toys, figures and collectibles for the Teenage Mutant Ninja Turtles, licensees embraced the franchise's classic as well as new designs for all all-out merchandising program tied to the *Out of the Shadows* movie, due in theaters June 3.

Star Wars is still selling strong, and new merchandise from novelty figure and toy licensees alike is focused on the classic and new ships and droids, rather than the characters. Sphero showed off an app-enabled BB-8 droid whose movements are controlled by a wrist band. Spin Master will release a larger version of the droid later this year.

Harry Potter merchandise was popular among novelty and costume manufacturers, with Elope releasing an extensive line of costumes and dress up in anticipation of the upcoming film *Fantastic Beasts and Where to Find Them* and the stage musical *Cursed Child*. Celebrating 30 years (with a luscious chocolate cake), German toy manufacturer Hape showed off its first license in style with a picturesque display featuring games, role play, arts & crafts and puzzles for *The Little Prince* film.

Point-and-click survival video game *Five Nights at Freddy's* was the breakout brand of its category, represented in novelties with plush, figures and small accessories. Established video game brands with upcoming media extensions such as Sonic the Hedgehog (celebrating its 25th anniversary), Halo (the 6th game is likely to land in 2017), Minecraft (film release scheduled for 2017) and World of Warcraft (film hits theaters June 2016) were strongly represented in action figures, toys and novelties. And with the upcoming *Angry Birds* film, partners such as Commonwealth and Spin Master showed off new extensions.

Classic Ghostbusters merchandise was on show from multiple novelty, action figure and toy manufacturers, with master toy licensee Mattel showing off figures from the new 2016 film. Licensees reported that Sony has clamped down on spoilers for merchandise for the new film however, and the brand was relatively scarce on the floor.

New film properties such as DreamWorks' *Trolls* (in the hands of master toy licensee Hasbro) and Disney's *The Good Dinosaur* and *Zootopia* (Tomy) were well represented

## WINNERS OF THE TOY INDUSTRY ASSOCIATION'S ANNUAL TOY OF THE YEAR (TOTY) AWARDS

- ▶ **Activity Toy of the Year:** Bunchems (Spin Master)
- ▶ **Boy Toy of the Year:** Lego Star Wars: The Force Awakens Millennium Falcon (LEGO)
- ▶ **e-Connected Toy of the Year:** Disney Infinity 3.0 Edition (Disney)
- ▶ **Educational Toy of the Year:** Vex Robotics Robotic Arm (Hexbug)
- ▶ **Game of the Year:** Pie Face Game (Hasbro)
- ▶ **Girl Toy of the Year:** Shopkins Scoops Ice Cream Truck (Moose Toys)
- ▶ **Infant/Toddler Toy of the Year:** Bright Beats Dance & Move BeatBo (Fisher-Price)
- ▶ **Innovative Toy of the Year:** Meccanoid G15 (Spin Master)
- ▶ **Outdoor Toy of the Year:** Razor GFD Fury (Razor USA)
- ▶ **Preschool Toy of the Year:** Doc McStuffins Pet Vet Checkup Center (Just Play)
- ▶ **Property of the Year:** Star Wars (Disney)
- ▶ **Specialty Toy of the Year:** Tumble Trax Magnetic Marble Run (Learning Resources)
- ▶ **Toy of the Year:** Doc McStuffins Pet Vet Checkup Center (Just Play)
- ▶ **People's Choice Award:** The Uptown Espresso Kitchen (KidKraft)

with play sets, action figures, plush and collectibles. In the wake of the Peanuts movie and coming up to the cartoon brand's anniversary celebrations, toy manufacturers have developed new lines for the CGI designs including Just Play, Sakar Intl., Cra-Z-Art and Schleich.

Plush and doll manufacturers are embracing superhero and new TV brands brands as well as dipping back into classic properties, with Aurora World launching a Precious Moments plush line.

### Small Delights

Riding on the nostalgic trend, collectible figures and plush are trending towards small and blocky (think 8-bit games), but with greater detail than ever before. And naturally, manufacturers are setting their sights on well-selling, low priced blind packs guaranteed to scratch the itch of impulse buyers and collectors alike. TPD debuted a new collectible mermaid-themed line, Splashlings, from Pound Puppies creator Mike Bowling (think Shopkins with soft plastic) that it is seeking to extend into other categories.

Suffice to say, novelty figure manufacturers such as Funko (new licenses include Zootopia, Pride & Prejudice and Zombies, Independence Day and Clueless) were in their element. And the effect extends to companies such as Sun-Staches, which picked up dozens of licensees last year for novelty sunglasses.



## Tech Enhanced Play

Seemingly no toy is complete without a connected app. While last year app-connected coloring books and app-controlled vehicles and robots were just finding their legs, this year companies have picked up an impressive roster of licensees. And resurrected toy brands brands such as *Spinjas* from Nowstalgic Toys are seeking to make their way back into customer's hearts with mobile games.

Through its Vivitar brand, Sakar Intl. is extending its kid's smart watches, karaoke and consumer electronics lines with licenses including emoji, Teenage Mutant Ninja Turtles and *The Walking Dead*. Small capacity (with 4GB being the most popular) character USB drives were also popular among other exhibitors.

Play is taking off for 2016, with branded drones expected to hit stores starting in Q2. Manufacturers have been careful to make their models light enough to eschew FAA rules that demand the machines be registered otherwise. Smaller, non-camera models are starting at \$60 with more involved models reaching \$125 at retail. Sakar Intl. showed two new drones for Nerf, both with onboard cameras that allow live streaming. World Tech Toys has new drones for upcoming film *Captain America: Civil War*, with video streaming and recording capabilities, as well as extended lines for DC Comics for helicopter-type drones with attached figures. And Mattel previewed a Barbie hoverboard expected to hit stores in Fall 2016 (sadly, not compatible with existing Barbie dolls).

While virtual reality headsets still need some work (think motion sickness), early adopters are enthusiastic. Mattel upgraded its Viewmaster with audio, enhanced details and zoom features. And Uncle Milton previewed VR headsets with 360° virtual tours for their ant farm, a space expedition and prehistoric dinosaur safari with plans to introduce licensed lines.

## 3D Printing

In a move that will make 3D printing accessible for the masses, Mattel unveiled its \$300 at-home printer, the ThingMaker. Although details such as colors and materials have yet to be ironed out, the printer will use flexible, textile plastics and print ready-to-go pieces that can be snapped together with ball joint assembly. Premade templates and an accompanying app simplify the design process for younger users. The company plans to introduce branded templates, presumably Barbie and Hot Wheels, at a later date.

Already on the ground, Piecemaker Technologies offers customizable on-demand 3D printed plastic miniatures with licensed templates from Ford and Nickelodeon.

## Japan Back in the Culture Game

As part of Pokémon's 20th anniversary celebrations, master toy licensee Tomy will release one retailer-exclusive limited edition plush every month this year in addition to figures and toys. With the 19th season of the TV series airing in spring and summer, the brand is being bolstered by

new trading card games and a broad consumer products program worldwide. Three classic games will be re-released for the Nintendo 3DS as well as a new title, followed by a Wii U game in spring and a new mobile game later this year.

Yo-Kai Watch promises to give the classic video game a run for its money with master toy licensee Hasbro pushing out a massive line of figures, plush, trading cards and collectible medallions. Underground Toys also displayed novelty merchandise at the show. Already the biggest boy's property in Japan, its TV series, comic books and video games launched late last year in the U.S.

Other foreign properties with significant merchandising, albeit through specialty manufacturers, were Final Fantasy, Hatsune Miku, Attack on Titan, Sailor Moon and Naruto Shippuden. Although anime merchandise sales have fallen over the last couple of years, specialty manufacturers are hopeful for the future.

## Those With Character

Emoji-branded small plush, accessories and toys were scattered through the show, with offerings from both the licensed trademark brand as well as in-house developed designs. And dinosaurs are still going strong, with manufacturers quietly introducing new educational-slanted lines—in licensed product for *Jurassic World* as well as home-grown lines.

Interestingly enough, pugs and pigs were enjoying a moment. Although not connected to the *Secret Life of Pets* character, arts & crafts and costume manufacturers embraced the affable dog breed. Gund brought out the live versions of its Prissy & Pop plush in a pink stroller. And of course, Peppa Pig was to be seen at master toy licensee Jazware's booth, with a collection of play sets, figures, plush and construction sets to be released this year. Colorforms (stickers) and Kurt Adler (holiday ornaments and decor) also showed off new lines for the British character.

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# Licensing News

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

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
I Love NY	Travel and tourism brand for the state of New York. Program will help build awareness of NY's 11 vacation regions.	Furniture, housewares, luggage, outdoor leisure products	Monica Hallinan, Brand Sense Partners
Pennsylvania State University	Public research university whose licensing program has generated nearly \$55 million in licensing royalties since 1994. Renewed thru Jun. 30, 2019.	All	Cory Moss, Collegiate Licensing Co. (CLC)
Ready Jet Go!	CGI animated series follows an alien kid who sets out on various astronomical adventures; teaches astronomy and Earth science concepts.	Apparel, publishing, toys	JJ Ahearn, Licensing Street

## Licenses Recently Granted, U.S.

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Angry Birds	Pez Candy*	Candy dispensers, digital content	Rovio Entertainment
Batman v Superman: Dawn of Justice	Bandai America	Model kits	Warner Bros. Consumer Products
	Buffalo Games	Puzzles	
	Fetch ... For Cool Pets!	Pet accessories	
	FunKo	Collectible figures	
	General Mills	Cereal boxes	
	JAKKS Pacific	Collectible figures	
	Junk Food Clothing	T-shirts	
	Matchless London Srl	Bags, leather jackets	
	Mattel	Dolls	
	National Entertainment Collectibles Association (NECA)	Figures	
	New Era Cap	Headwear	
	Noble Collection	Prop replicas	
	Pez Candy	Candy, candy dispensers	
	Sakar Intl.	Consumer electronics, electronic accessories	
	Scholastic Media	Books, novels	
	Sideshow Collectibles	Statues	
	Soap Studio Co. Ltd.	Figures	
Spin Master	Remote-controlled vehicles		
Thinkway Toys	Role play		
Titan Publishing/Titan Entertainment	Art books, magazines		
Tonner Doll	Fashion dolls		
BFG (The)	Acco Brands	Calendars	Striker Entertainment
	FunKo	Figurines	
	Mad Engine	Apparel	
	Madame Alexander Doll Co.	Doll accessories, plush figures	
	Reliance Games	Mobile game apps	
	That Company Called IF	Bookmarks, reading lights	
	Trick or Treat Studios	Halloween costumes, masks	
Weta Workshop	Collectibles, dog toys, lapel pins, statues		
Black & Decker	Bradshaw Intl.	Bakeware, barbecue tools, cookware, cutlery, kitchen accessories	Beanstalk
Coca-Cola	Mark Feldstein & Associates	Clocks, LED night lights, power banks	Coca-Cola
Collegiate Licensing Co.	Dooney & Bourke	Accessories, purses	Collegiate Licensing Co. (CLC)
Dark Souls	Titan Publishing/Titan Entertainment	Comic books	Bandai Namco Games Inc.
David Ortiz	Tommy Bahama*	Shirts	MLB Players Association
DaySpring	Florists' Transworld Delivery (FTD)	Flower bouquets, vases	Hallmark Licensing
DC Comics	Sambro Intl.*	Plush toys	Warner Bros. Consumer Products

\*Extension or renewal.

Continued on page 11

## Licensing News Continued from page 10

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
DC Super Hero Girls	Target	Accessories, apparel, dress-up, publishing, toys	Warner Bros. Consumer Products
Descendants	Sakar Intl.*	Electronic novelties, karaoke machines, selfie sticks	Disney Consumer Products
Disney Princess	Sakar Intl.*	Electronic novelties, karaoke machines, selfie sticks	Disney Consumer Products
EatingWell	Bellisio Foods	Frozen foods	Meredith
Finding Dory	Pillow Pets div. CJ Products	Plush pillows	Disney Consumer Products
Ford	Bradford Exchange	Accessories, bags, glassware, jewelry, shirts, wall decorations	Global Icons
	Eurosport Daytona	License plate frames, license plates	
	H3 Sportgear*	Bags, headwear, t-shirts	
	High Range Designs dba Laid Back	Apparel, banners, beverage containers, decals, headwear, signs	
	Maisto div. May Cheong Toy Products Pty. Ltd.	Die-cast replica vehicles	
	Revell*	Model kits & figures	
Frozen	Sakar Intl.*	Electronic novelties, karaoke machines, selfie sticks	Disney Consumer Products
Fuller Brush	CARD.com	Prepaid debit cards	Alex Meisel & Co.
	Core Pacific	Shower curtain rods, step stools	
	USA Filtration	Water purification systems	
Hallmark	Florists' Transworld Delivery (FTD)	Flower bouquets, vases	Hallmark Licensing
Hallmark Flowers			
Isaac Mizrahi	Hewlett-Packard (HP)	Smart watches	Xcel Brands
Justice League	Crazy Foam Intl.	Bubble bath	Warner Bros. Consumer Products
Kathy Ireland	Bush Industries	Furniture	Kathy Ireland Worldwide (kiWW)
Laura Ashley	Downlite	Bedding	Laura Ashley
Lindsay Luv	FAM Brands	Activewear	DJ Lindsay Luv
Little Golden Books	Gymboree	Accessories (infants'), apparel (infants')	Penguin Random House
Little League Baseball	Russell Athletic*	Souvenirs, uniforms	Little League Baseball & Softball
Looney Tunes	Crazy Foam Intl.	Bubble bath	Warner Bros. Consumer Products
LPGA	Just4Golf Accessories	Golf accessories, headwear	Brand Liaison (The)
Magnolia Home by Joanna Gaines	Loloi Rugs	Rugs	Magnolia Home
Manchester United	Columbia Sportswear	Outerwear	Manchester United Merchandising
Marvel	Bif Bang Pow!/Entertainment Earth	Car flags, collectibles, jack-in-the-boxes, license plate frames, sports/fitness equipment, wooden figures	Disney Consumer Products
Moana	Pillow Pets div. CJ Products	Plush pillows	Disney Consumer Products
	Sakar Intl.*	Electronic novelties, karaoke machines, selfie sticks	
NFL	Levi Strauss*	Apparel	NFL
NFL Players Association	TinyCo	Mobile game content	NFLPA
Pennsylvania State University	Alex & Ani	Bangles, bracelets	Collegiate Licensing Co. (CLC)
	Panini America	Trading cards	
PetSac	FAB Starpoint	Backpacks	Accessory Headquarters (AHQ)
Pride and Prejudice and Zombies	Hot Topic	Lingerie	Sony Pictures Consumer Products
Rebecca Minkoff	Maggie Louise Confections	Chocolate	Rebecca Minkoff
seedling by thomaspaul	NuLOOM	Rugs	Product Lounge
SHAPE	Apparel Bridge	Activewear (women's)	Meredith, Star Branding
Sonic the Hedgehog	Accutime Watch	Watches	SEGA of America
	Bentex Group	Swimwear (children's, junior's)	
	CARD.com	Prepaid debit cards	
	Concept One Accessories	Cold weather accessories, headwear	
	H2W/Sun-staches	Novelty sunglasses	
	Komar Sleepwear	Sleepwear (children's)	
	Loungefly	Buttons, stickers	
	Numskull div. Rubber Road Ltd.	Key chains, socks, sweaters	

Continued on page 12

## Licensing News *Continued from page 11*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Sonic the Hedgehog	Signorelli	Apparel (juniors', women's)	SEGA of America
	Toy Factory	Amusement plush	
	Vandor	Drinkware	
Star Trek	Abyse	Giftware	CBS Consumer Products
	Accutime Watch	Watches	
	Brainstorm Gear	Sportswear	
	Build-A-Bear Workshop	Custom plush	
	Gale Force Nine	Games	
	H2W/Sun-staches	Novelty sunglasses	
	KV&H Verlag GmbH	Calendars	
	Planet Replicas Ltd.	Home accessories, watches	
	Santex Moden GmbH	Apparel	
	Somberbond	Sleepwear	
	Spin Master	Remote-controlled vehicles	
	That Company Called IF	Bookmarks	
	Threadless	Socks, t-shirts	
	Titan Merchandise/Titan Entertainment	Vinyl figures	
	Ugg Since 1974/Burlee Australia	Footwear	
USAOPOLY	Board games		
Wish Factory (The)	Plush		
Team USA	KT Tape	Kinesiology tape	U.S. Olympic Committee
Teenage Mutant Ninja Turtles	Activision*	Video games	Nickelodeon & Viacom Consumer Products
	Pillow Pets div. CJ Products	Plush pillows	
thomaspaul	NuLOOM	Rugs	Product Lounge
Trolls (2016)	Pillow Pets div. CJ Products	Plush pillows	DreamWorks Animation
Warner Bros.	Sambro Intl.*	Plush toys	Warner Bros. Consumer Products

## International Properties Available or Recently Assigned

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Antik Batik	Women's ready-to-wear and fashion accessories with European and Indonesian influences, romantic designs and colorful prints.	Accessories, fragrance, home decor & furnishings, personal care (North America)	Julie Newman, Jewel Branding & Licensing
Art Therapy, Animorphia	Adult colouring books from Michael O'Mara Books	Gifts (U.K.)	John McInnery, Allsorts Licensing
Cartoon Network	Portfolio of brands includes The Powerpuff Girls, Ben 10, We Bare Bears and Adventure Time.	All (Southeast Asia)	Neal Rudge, Pacific Licensing Studio Pte. Ltd.
Little Prince (The)	Classic 1943 novella brand with over 150 active licensees worldwide and \$100 million in annual retail sales; includes 2018 75th Anniversary Celebration logo.	All (North America)	Leslie Levine, Licensing Works!
Nitro Circus	Extreme sports brand based in live shows showcasing freestyle motocross, BMX and skate stunts.	Toys (Worldwide)	Peter Maule, Nitro Circus
		All (U.K., Ireland)	Francesca Lisle-Grimshaw, Lisle Intl. Licensing
Nookii	Adult board game where, rather than moving around a board, players move around their partner.	Gifts (Worldwide)	Richard Longhurst, Lovehoney
PGA Tour	Golf league operates more than 100 events annually. Over 100 licensees worldwide.	All (Worldwide)	Scott Bouyack, Fermata Partners
Prettie Girls!	Doll brand features five characters diverse in culture, interests and style. Launched in 2015.	Bedding, educational products, mobile game apps (Worldwide; 3 yrs.)	Cynthia Modders, Firefly Brand Management
Pushen the Cat	Chubby cat character and star blogger with a Facebook page boasting over 9 million fans and her own emoticons that are being sent more than 14 million times a day.	All (ANZ)	Thomas Punch, Haven Licensing
		All (Mexico)	Yolanda Gonzalez, Brand New Day
Red Nose	Brazilian extreme sports brand with over 40 licensees in Latin America including apparel, accessories, sporting goods and back-to-school.	All (North America)	David San Juan, Vidorra Group

\*Extension or renewal.

*Continued on page 13*

## Licensing News *Continued from page 12*

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
<b>Regal Academy</b>	Girl's animated show stars a girl enrolled in a school for fairy tale characters. To be broadcast worldwide by Nickelodeon.	Back-to-school, confectionery, footwear (Italy)	Graziano DelMaestro, Giochi Preziosi
<b>Sergio Tacchini</b>	Italian sportswear brand celebrates its 50th anniversary this year. Licensed in apparel, footwear, accessories, bedding and back to school.	All (Worldwide)	Marcelo Cordeiro, WME/IMG (Italy)
<b>Shopkins</b>	Australian toy brand with small collectible dolls based on grocery items and play sets.	All (EMEA; excl. U.K., Ireland)	Antoine Erligmann, Corus Entertainment/Nelvana Enterprises
		All (Belgium, Netherlands, Luxembourg)	Daphne Kellerman, License Connection
		All (Middle East)	Christian Zeidler, 20TOO
		All (Germany)	Peter Bichler, Lizenzwerft GmbH
		All (Portugal)	Alice Durand, Popcorn Brand Activity
		All (Spain, Italy, Greece, Turkey, Poland, Croatia, Czech Republic, Hungary, Romania, Slovakia, Slovenia)	Diego Ibáñez Belaustegui, Planeta Junior (Spain)
<b>Strawberry Shortcake</b>	Greeting card-based character design of a young girl with a fruit-inspired theme.	All (Japan)	Hiroko Hoshino, Sony Creative Products
<b>Vanderbilt University</b>	Nashville, Tennessee undergraduate school whose merchandise is sold in over 935 retail locations, with royalties increasing more than 165% since 2007.	All (Worldwide; 5 yrs.)	Cory Moss, Collegiate Licensing Co. (CLC)
<b>Winnie &amp; Wilbur</b>	Animated series based on the best-selling Winnie the Witch picture books by Valerie Thomas and Korky Paul.	All (Latin America)	George Sonoda, Discovery Consumer Products (Latin America)

## International Licenses Recently Granted

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
<b>Alice Cooper</b>	Spike Games	Online slots (Worldwide)	Global Merchandising Services
<b>Angry Birds</b>	Poeticgem/Poetic Brands Ltd.	Apparel (adults': U.K.)	Bulldog Licensing
	Ravensburger AG	Jigsaw puzzles (U.K.)	
	Sambro Intl.	Bags, stationery (U.K.)	
	Smith & Brooks Ltd.	Apparel (children's: U.K.)	
<b>Art Therapy, Animorphia</b>	Pyramid Intl.	Posters (U.K.)	Allsorts Licensing
<b>Batman v Superman: Dawn of Justice</b>	Bioworld Merchandising	Accessories, apparel (Worldwide)	Warner Bros. Consumer Products
	Converse	Footwear (Worldwide)	
	Hallmark Cards	Gifts, novelties (Worldwide)	
	LEGO Systems	Construction block sets (Worldwide)	
	Mattel	Master toy (Worldwide)	
	Rubie's Costume	Costume accessories, costumes (Worldwide)	
<b>Beryl Cook</b>	Frances Lincoln div. Quarto Publishing Group UK	Cookbooks, journals, postcard boxes (U.K.)	This is Iris
	Otter House Ltd.	Stationery (U.K.)	
	Ravensburger AG	Jigsaw puzzles (U.K.)	
<b>Captain America</b>	Bioworld Merchandising Europe	Apparel (Europe)	Disney Consumer Products
<b>Dinotrax</b>	Little, Brown Books for Young Readers	Board books, books, sticker books, story books (U.S., Canada)	DreamWorks Animation
<b>Discovery Kids</b>	Sakar Intl.*	Cameras, electronics, headphones, karaoke machines, speakers (North America)	Discovery Consumer Products
<b>Disney</b>	Ethan Allen	Furniture, home decor (U.S., Canada)	Disney Consumer Products
<b>Disney Princess</b>	Hasbro	Dolls (Worldwide)	
<b>emoji</b>	Nemcor	Pillows, throws (Canada)	Studio Licensing
	Sakar Intl.	Consumer electronics (Canada)	
	Townley Cosmetics	Cosmetics (Canada)	
	Unique Industries	Party goods (Canada)	
	X-Treme Worldwide	Apparel (Canada)	

\*Extension or renewal.

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## Licensing News *Continued from page 13*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
<b>Ermanno Scervino</b>	Andrea Montelpare SpA	Footwear (children's: Worldwide; 3 yrs.)	Ermanno Scervino
<b>Escape from New York</b>	TinyCo	Mobile game content (Worldwide)	Creative Licensing Corp. (CLC)
<b>Fairy Tail</b>	GameSamba	Online games (Worldwide)	FUNimation/Group 1200 Media
	NGames Interactive	Mobile game apps (Worldwide)	
<b>FC Barcelona</b>	Trends International	Posters (U.S., Canada)	One Entertainment
<b>Finding Dory</b>	Bandai America	Master toy (Worldwide)	Disney Consumer Products
<b>First Blood</b>	TinyCo	Mobile game content (Worldwide)	Creative Licensing Corp. (CLC)
<b>Five Nights at Freddy's</b>	Trends International	Bookmarks, calendars, decals, posters, stickers, temporary tattoos, wrapping paper, writing instruments (U.S., Canada, Mexico)	Striker Entertainment
<b>Ford</b>	Dickie Toys Hong Kong Ltd.	Remote-controlled vehicles (Worldwide)	Global Icons
	Stadlbauer Marketing & Vertrieb GmbH	Model vehicles (Worldwide)	
<b>Garfield</b>	Beijing Xiaomi Mobile Software Co., Ltd.	Digital content (China, excl. Hong Kong)	Medialink Entertainment (Far East) Ltd.
	Branded Clothing Intl.	Footwear, sleepwear, swimwear, underwear (U.K., Eire)	Bulldog Licensing
	Editorial Verbo S.A. div. Babel	Books (Portugal)	Mendia Licensing
	Falabella S.A.	Night shirts, robes, slippers (Chile)	Mary Hume dba Keystone Marketing
	Modify Watches	Watches (Worldwide)	Bulldog Licensing
	Noi Sirius	Chocolate (Denmark, Finland, Iceland, Norway, Sweden)	Plus Licens AB
	Planeta Editorial*	Comic books (Spain)	Mendia Licensing
	Praim Group	Chocolate bars (U.S., Canada)	Paws, Inc.
	Saborn Trading BV	Apparel (Belgium, Luxembourg, Netherlands)	BN Licensing B.V.
<b>Harry Potter</b>	Carat Shop (The)	Jewelry (U.K.)	Warner Bros. Consumer Products
<b>In the Night Garden</b>	Golden Bear Toys*	Master toy (U.K., Ireland: 5 yrs.)	DHX Brands
<b>Jurassic Park</b>	Microgaming*	Online slots (Worldwide)	Universal Brand Development
<b>Justin's House</b>	Golden Bear Toys	Master toy (U.K.)	BBC Worldwide
<b>Kitty Club</b>	WhatNot Toys	Toys (North America)	Dracco Co. Ltd.
<b>Marni</b>	Andrea Montelpare SpA	Footwear (children's: Worldwide; 3 yrs.)	Marni Group div. OTB
<b>Miraculous: Tales of Ladybug &amp; Cat Noir</b>	Bandai America	Master toy (Worldwide)	Zag America
<b>Mister Maker</b>	toucanBox	Arts & crafts kits, subscription service (U.K.)	Zodiak Kids
<b>Montezuma's</b>	Kimm & Miller	Gift boxes (U.K.)	Montezuma's Chocolates Ltd., Point 1888 (The)
<b>My American Friend</b>	Simba Dickie Group	Master toy (Europe)	Rainbow S.r.l.
<b>NHL</b>	Playmobil USA*	Toys (U.S., Canada)	National Hockey League Players' Association (NHLPA)
<b>Oxford</b>	Clementoni UK Ltd.	Games, puzzles (U.K.)	University of Oxford (Oxford Ltd.)
<b>Paddington Bear</b>	Orange Tree Toys	Wooden toys (U.K.)	Copyrights Group (The)
	Rainbow Designs	Plush (U.K.)	
<b>Peppa Pig</b>	Costa Cruises/Costa Crociere S.p.A.	Cruise activities (Worldwide)	Entertainment One (eOne) U.K.
<b>Playboy</b>	Balls & Tackles Pty Ltd.	Boxers & underwear sets, underwear (men's: Australia)	Playboy Enterprises
	Barocco div. P&L Global Network	Bra accessories, lingerie, shapewear (women's), underwear (South America, Central America, Caribbean: selected territories)	
<b>Regal Academy</b>	Giochi Preziosi	Fashion dolls, master toy, play sets, role play (Europe)	Rainbow S.r.l.
<b>Rock (The)</b>	Under Armour	Accessories, apparel, footwear (Worldwide)	World Wrestling Entertainment (WWE)
<b>Royal Horticultural Society</b>	Michael O'Mara Books	Coloring books, diaries, notebooks, postcard books (U.K.)	Royal Horticultural Society/RHS Enterprises Ltd.
<b>Shopkins</b>	Accessories Trade Mark (ATM)	Handbags, shopping bags, sports bags (EMEA; excl. U.K., Ireland)	Corus Entertainment/Nelvana Enterprises
	BonBon Buddies GmbH	Confectionery (EMEA; excl. U.K., Ireland)	
	Canal Toys	Stationery (EMEA; excl. U.K., Ireland)	
	Ravensburger AG	Puzzles (EMEA; excl. U.K., Ireland)	
<b>Smiley World</b>	Blueprint Collections	Bags, gifts, journals, notebooks, stationery (U.K.)	SmileyWorld
<b>Sonic the Hedgehog</b>	TOMY	Master toy (Worldwide)	SEGA of America

\*Extension or renewal.

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## Licensing News *Continued from page 14*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Star Trek	Logoshirt Textil GmbH & Co. KG	Apparel (Europe)	CBS Consumer Products
	Nimble Solutions Ltd. tda Lovarzi	Scarves, umbrellas (U.K.)	
Stick Man	Fabric Flavours	T-shirts (children's: U.K.)	Magic Light Pictures
	Specsavers Optical Group	Reading frames (U.K.)	
Taylor Swift	Glu Mobile	Mobile game apps (Worldwide; multi-year)	Sony Music Entertainment
Teddy Ruxpin	Wicked Cool Toys	Master toy (Worldwide)	Alchemy II
Teenage Mutant Ninja Turtles Out of the Shadows	Trends International	Calendars, posters, stickers (U.S., Canada)	Nickelodeon & Viacom Consumer Products
Teletubbies	Bladez Toyz Plc	Inflatables (U.K.)	DHX Brands
	HTI Group	Activity toys, musical play sets, novelty toys (U.K.)	
	Kokomo Ltd.	Dental aids, toiletries (U.K.)	
	Misirli U.K. Ltd.	Socks (U.K.)	
	Whitehouse Leisure LLP	Amusement plush (U.K.)	
Terminator 2: Judgment Day	TinyCo	Mobile game content (Worldwide)	Creative Licensing Corp. (CLC)
Tiffany & Co.	Coty	Fragrance (Worldwide)	Tiffany & Co.
Tokyo Ghoul	GameSamba	Online games (Worldwide)	FUNimation/Group 1200 Media
	NGames Interactive	Mobile game apps (Worldwide)	
Tommy Hilfiger	G-III Apparel Group*	Apparel (women's), luggage, outerwear, sportswear (women's: U.S., Canada; multi-year)	Tommy Hilfiger
Twisted Whiskers	Trends International	Bookmarks, calendars, stickers (U.S., Canada)	American Greetings Entertainment
Winx Club	Witty Toys BV*	Dolls, master toy (Worldwide)	Rainbow S.r.l.
World of Eric Carle (The)	Alligator Publishing	Safety products (infants'), travel accessories (infants': U.K.)	Joester Loria Group
	Parragon Books Ltd.*	Activity sets, gifts, puzzles (U.S., Canada, U.K., Ireland, South Africa, ANZ, Japan, South East Asia)	
Zomlings	WhatNot Toys	Collectible toys (North America)	Magic Box Intl.

\*Extension or renewal.



## contacts & connections

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**contacts & connections** *Continued from page 15*

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## contacts & connections *Continued from page 16*

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## TOYS &amp; GAMES

## The State of Girls' Toys

2016 promises to be bigger than ever for licensed toys and games. Category sales reached \$7.5 billion in 2015, according to *TLL's Annual Licensing Business Survey*, and are expected to grow this year. But amidst soaring success, girls' toys have been seeing slumping sales, with giants such as Mattel and Hasbro reporting declines. To counter this, the licensing industry is stepping up with more intelligently designed girls' SKUs, toys that bridge the gender gap, modified retail strategies and entertainment properties with strong female characters.

One possible reason for falling sales? Stereotypes that “in essence make all girls' toys a preschool category,” according to Richard Gottlieb, CEO of Global Toy Experts, who points at the proliferation of infantilized product and gendered marketing that puts girls off of otherwise gender-neutral toys. Another factor is the fact that media properties which are enjoyed by both genders on the screen often become simplified into either boys' or girls' brands in toy aisles—with the risk of alienating boys as well as girls in merchandising. These hyper-focused tactics can add up to lost licensing profits. And while the focus here is toys, this can apply to all gender-segregated categories—from bedding, to apparel, to toothbrushes.

No one in the industry is actively biased against girls. All retailers, licensees and licensors who were consulted for this story were clear that they would not ignore a real sales opportunity. Indeed, capitalism is the great equalizer. But the problem lies in the fact that sometimes licensed products are marketed and designed in limiting ways through unconscious assumptions about children's play patterns and conservative industry habits. Since the 1990's, selling toys along narrow demographic lines worked. Critics argue that the issue is circular—girls don't buy action figures for example, because they aren't marketed to them and not because they aren't interested in playing with them. Today, as social attitudes towards gender identity are shifting and greater consumer backlash against the perceived bias against girls mounts, the licensing industry is working to shift gears.

### Mounting Awareness

The hyper-gendering of toys is particularly troubling for entertainment/character properties, where toys and games make up the largest share of licensed products—30.8% in 2014. The largest film properties in licensing right now—*Frozen*, *Jurassic World*, *Minions*, *Star Wars: The Force Awakens*—all pass the Bechdel Test for gender parity and enjoy a broad fan base.

But licensor's efforts to include women and girls will not help royalty revenues if manufacturers do not make products featuring them. The most recent example: Disney's record-breaking *Star Wars: The Force Awakens* sparked a campaign criticizing the omission of female lead Rey from merchandise. Some blame in this case can be shifted to

Disney's veil of secrecy, as most merchandise singled out was released for Force Friday—“This new wave of product has got key elements from the film ... we wanted to hold back until the film had been released,” Paul Southern, Head Lucasfilm Licensing, told *Entertainment Weekly*. “The timing is good to try to address some of the social discussion that has been created through the ‘Where's Rey?’ movement.” Indeed. If Princess Leia figures couldn't sell in the 1980s, now demand for Rey is outpacing stock.

Much of consumer outrage is centered on properties that have universal appeal, but whose merchandise is marketed to one gender. *Jurassic World* is another box-office leader that caught flack for marginalizing the girls' market, with product lines aimed at boys despite the fact that nearly half of the audience for the opening weekend were women. In one example, Hasbro erroneously identified the gender of its dinosaur action figures as male. At the same time, *Black Widow* was notably absent from *Avengers: Age of Ultron* merchandise.

Let Toys Be Toys, a U.K. grassroots campaign group, tracks other examples as they are reported on social media (with Marvel's *Avengers* and *Paw Patrol* trending at the time of writing). Campaigner Jess Day notes that although viewing figures for BBC children's shows fall equally along gender lines, a property or “character which is loved by boys and girls asuch as is suddenly a ‘girl’ or ‘boy’ property once you hit the toy shelves.”

Traditional targets of watch groups, such as LEGO's *Friends* line and Mattel's *Barbie*, are seeing rising profits after research led them to create smarter toys lines for girls with more complex components comparable to boys' toys. *Pink* sells, but it seems to sell better when it's not dumbed down.

### Upcoming Entertainment/Character Properties

Of the 125 upcoming movies through 2020 identified by *TLL* with potential for licensing, almost 40 are confirmed to have female leads. The list includes films whose merchandise is traditionally girl-oriented such as *Hello Kitty* and *Monster High*, as well as male-skewing franchises that are bringing empowered women characters into the spotlight such as *Wonder Woman* from DC Comics, *Ghostbusters* and *Star Wars*. The latter in particular are ripe opportunities for bringing sales in from the girls' market.

And over 2016–17, four girls' TV series will launch, including “DC Super Hero Girls” and “Mysticons,” that feature empowered girls.

### Shifts in Retail

Retailers are beginning to group products by type rather than gender. Let Toys Be Toys recorded a 60% drop in gendered signage in U.K. toy stores over 2013-14. So far 14 retailers, including Toys 'R' Us and Tesco, have pledged to drop the distinction between boys' and girls' toys in aisles. In

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followups, the campaign group notes that “organising stores and websites by genre instead of gender has done no harm to anyone’s retail success.” Stateside, retailers such as Wal-Mart, Target and Toys ‘R’ Us are beginning to do the same.

And now that brick and mortar stores are reducing their footprint and the fight for shelf space gets more cutthroat, placing boys’ and girls’ products together in the same aisle—and selling to both—might make more fiscal sense.

#### PLANNED FEATURE FILMS WITH LICENSING POTENTIAL & FEMALE LEADS, 2016–2020

FILM	RELEASE DATE	LICENSOR	NOTES
Alice Through the Looking Glass	5/27/16	Walt Disney Studios	Johnny Depp and Mia Wasikowska reprise their roles in the sequel to 2010’s Alice in Wonderland. Tim Burton again directs.
Finding Dory	6/17/16	Walt Disney Studios	Albert Brooks and Ellen DeGeneres reprise their voicing roles in Finding Nemo sequel. Licensees for the original film include Zak Designs, Random House.
The BFG	7/1/16	Walt Disney Studios	Steven Spielberg helms this adaptation of the Roald Dahl book about a young girl on an adventure with a benevolent giant.
Ghostbusters	7/15/16	Sony	Sony will be putting much of its focus on Ghostbusters, with licensing for the Melissa McCarthy vehicle overlapping resurgent interest in the classic Ghostbusters property, which celebrated 30 years in 2014.
Suicide Squad	8/5/16	Warner Bros.	In this DC Comics property, a group of supervillains is recruited for duties deemed too dangerous for superheroes. Will Smith, Margot Robbie, Jared Leto and Jesse Eisenberg are part of the squad.
Bridget Jones’s Baby	9/16/16	Universal Pictures	Renee Zellweger once again plays Bridget, this time in her 40s and attempting to have a baby before it’s too late.
Monster High	10/7/16	Universal Pictures	Based on the Mattel toy line, children of famous monsters experience high school in this live action musical.
Trolls	11/4/16	DreamWorks Animation	Animated film based on the classic dolls tells the stories of how the Trolls came into their colorful hair.
Moana	11/23/16	Walt Disney Studios	A bold teenage girl travels through the ancient South Pacific world of Oceania.
Star Wars: Rogue One	12/16/16	Walt Disney Studios	The first Star Wars “anthology film” (aka spinoff), Rogue One is set between Episodes III and IV. Directed by Gareth Edwards.
Power Rangers	1/13/17	Lionsgate	A group of high school kids harness their superpowers to save the world in the newest take on this Saban brand.
Resident Evil: The Final Chapter	1/27/17	Sony Screen Gems	Humanity is on its last legs in Alice’s (Milla Jovovich) most difficult adventure.
Fifty Shades Darker	2/10/17	Universal Pictures	Sequel to bondage blockbuster Fifty Shades of Grey, based on the E.L. James novels. Officially licensed goods for the first film included adult toys from Lovehoney.
Beauty and the Beast	3/17/17	Walt Disney Studios	Another live-action Disney adaptation of its own animated film. Emma Watson plays Belle.
The Divergent Series: Ascendant	3/24/17	Lionsgate	Fourth and final film in The Divergent Series. Shailene Woodley and Theo James star.
Ghost in the Shell	3/31/17	Walt Disney Studios	Scarlett Johansson stars in this adaptation of the Japanese comic and anime films about a member of a covert ops unit that fights technology related crime.
Get Smurfy	3/31/17	Sony Pictures	Mandy Patinkin voices Papa Smurf in this all-animated film focusing on the origins of the Smurfs.
Star Wars: Episode VIII	5/26/17	Walt Disney Studios	Picks up where 2015’s Episode VII: The Force Awakens leaves off. Second film in Disney’s new Star Wars sequel series since acquiring Lucasfilm.
Barbie	6/2/17	Sony Pictures	Live-action film based on the toy line. Screenplay by Diablo Cody.
The Fantastic Four 2	6/9/17	20th Century Fox	Sequel to Fox’s 2015 reboot of the Fantastic Four series.
Wonder Woman	6/23/17	Warner Bros.	An Amazon princess becomes the greatest of DC superheroines.
Pitch Perfect 3	8/4/17	Universal Pictures	Another a capella adventure.
Justice League: Part 1	11/17/17	Warner Bros.	The DC gang’s all here in this story focused on the original incarnation of the Justice League: Batman, Superman, Wonder Woman, Aquaman, the Flash and Green Lantern.
The Croods 2	12/22/17	DreamWorks Animation	Sequel to the 2013 caveman hit.
Avatar 2	Dec. 2017	20th Century Fox	Sequel to the highest grossing film of all time, expected to focus on filmmaker James Cameron’s in-depth look into Pandora’s oceans.
My Little Pony	TBA 2017	Allspark Pictures/Lionsgate	Animated film for Hasbro’s \$1 billion toy-based brand, from the creators of the TV series.

**PLANNED FEATURE FILMS WITH LICENSING POTENTIAL & FEMALE LEADS, 2016–2020 (CONT.)**

FILM	RELEASE DATE	LICENSOR	NOTES
Fifty Shades Freed	2/9/18	Universal	Third installment in the Fifty Shades trilogy details the couple's life after marriage.
Avengers: Infinity War (Part 1)	5/4/18	Walt Disney Studios	This time the Avengers face the menace of Thanos.
Captain Marvel	3/8/19	Walt Disney Studios	Marvel's first female superhero movie follows Captain Marvel, aka Carol Danvers, who can fly and shoot energy bursts from her hands.
Avengers: Infinity War (Part 2)	5/3/19	Walt Disney Studios	Second half of the third Avengers film.
Justice League: Part 2	6/14/19	Walt Disney Studios	Sequel follows the DC Comics-based superhero team.
Incredibles 2	6/21/19	Walt Disney Studios	Writer/director Brad Bird's sequel to 2004's <i>The Incredibles</i> .
Inhumans	7/12/19	Walt Disney Studios	In this Marvel film, an isolated community of superhumans fight to protect themselves.
Bad Boys 4	7/3/19	Sony Pictures	Follows 2017's <i>Bad Boys 3</i> .
Avatar 4	Dec. 2019	20th Century Fox	Third sequel to the highest grossing film of all time.
Star Wars: Episode IX	TBA 2019	Walt Disney Studios	Final chapter of the newest Star Wars trilogy.
Hello Kitty	TBA 2019	Sanrio	Cartoon feline feature film.
Cyborg	4/3/20	Warner Bros.	Cyborg, aka Victor Stone, is a member of the Justice League.

SOURCE: THE LICENSING LETTER

**ENTERTAINMENT/CHARACTER**
**Six New Streaming Shows with Licensing Potential**

News of new kids' TV distribution deals made by Netflix and Amazon recently drove home a discussion we have increasingly been having with licensing executives about the ability of digital platforms to launch new properties (as well as boost business for existing brands).

While hard data showing a positive causal relationship between viewership on digital platforms and licensed merchandise sales is still hard to come by, in part because Netflix closely guards its viewership data, many industry executives nevertheless see a strong correlation. "Netflix has moved the [merchandise sales] needle on shows that have gone from broadcast" to the digital platform, one licensing agent assured us.

Launching a new property on Netflix is beneficial in markets where the service is well-established, namely the U.S., Canada and the U.K., agreed a licensor.

Netflix—and to a lesser extent Amazon and Hulu, which have not been as aggressive in pursuing original kids content—provide a welcome expansion of the kids' television market. Netflix recently launched DreamWorks' Animation's *Dinotrux*, for example, and Amazon last month bowed live action *Just Add Magic*. Industry experts are quick to note, however, that licensing success still comes down to the appeal of the content itself and the space available at retail.

With that in mind, we offer six new series—five from Netflix and one from Amazon—with licensing potential.

**SIX NEW KIDS SHOWS PREMIERING ON DIGITAL PLATFORMS**

SHOW	PRODUCER	DISTRIBUTOR	NOTES
Beat Bugs	Grace: A Storytelling Company, Thunderbird and Beyond Screen Production	Netflix	Animated series featuring renditions of Beatles songs by artists including Eddie Vedder, Pink and Sia premieres this summer.
Word Party	The Jim Henson Co.	Netflix	Vocabulary building show to preschoolers premieres June 3.
Lalaloopsy	MGA Entertainment	Netflix	This 13-episode animated series emphasizing self-expression and friendship is part of a revitalization effort for the doll property. Starts in the fall.
Stretch Armstrong	Hasbro Studios	Netflix	Teen Jake Armstrong and his two best friends become superheroes after exposure to experimental chemicals.
The Greenhouse	Nutz Productions	Netflix	Live-action series for 2017 about rival houses at an elite boarding school that unite to fight evil forces.
Thunderbirds are Go	ITV Studios	Amazon	Amazon has ordered four seasons of the animated series based on the 1960s British teen sci-fi property.

SOURCE: THE LICENSING LETTER

## TOYS &amp; GAMES

## NPD: Star Wars Toy Sales One-Third Higher than Frozen

*Star Wars*, the space epic whose newest chapter has knocked down box-office records around the world, also drove sales of movie licensed toys up by almost 10% in 2015, according to The NPD Group's year-end accounting of U.S. toy sales. Connection to entertainment content was the key driver behind the growth of the toy industry in 2015, NPD found, with overall toy sales growing 6.7% during the year. Movie licensed toys, led by *Star Wars*, significantly outperformed the overall market with 9.4% growth.

While movie licenses led the toy market growth, other kinds of entertainment content were also a factor in the growth of key properties, including TV (*Paw Patrol*), apps (*Minecraft*) and YouTube videos (*Shopkins*).

*Star Wars* was the top licensed toy property of the year, generating more than \$700 million in retail sales by NPD's count—about one-third more than the \$531 million in sales NPD attributed to *Star Wars*' Disney sibling, *Frozen*, in 2014. In 2015, *Star Wars* generated more sales and contributed more growth than other blockbuster movie properties *Jurassic World*, *Minions* and *Avengers* combined, NPD reported.

*Star Wars* was the No. 1 absolute dollar growth contributor to three of NPD's super-categories: action figures, vehicles and all other toys. The property was not, however, responsible for the top toy of the year. That distinction went to Moose Toys' *Shopkins*.

"What was especially interesting to see this year among the top ten selling items was the wide diversity of toys from simple to complex," said Juli Lennett, U.S. toys industry analyst for NPD. "In addition, among the top toys were evergreen properties such as *Hot Wheels*, *Barbie*, *Star Wars* and *Ninja Turtles*, as well as relatively new properties such as *Shopkins*, *Paw Patrol* and *Minecraft*. Price points were also wide ranging, from under \$1 to over \$150."

### TOP SELLING TRADITIONAL TOY ITEMS\*, 2015

RANK	ITEM	MANUFACTURER
1	Shopkins 12 Pack Asst	Moose Toys
2	Paw Patrol Basic Vehicle w/ Pup Asst	Spin Master
3	Hot Wheels Car Basic Asst	Mattel
4	Shopkins 2 Pack	Moose Toys
5	Barbie Dream House	Mattel
6	Teenage Mutant Ninja Turtles Fig Asst	Mattel
7	Minecraft Mini Figures Asst	Mattel
8	Star Wars Sphero App Controlled BB-8	Sphero
9	Hot Wheels 5 Car Gift Pack Asst	Mattel
10	Minecraft The Cave	LEGO Group

Note: \*List does not include retail exclusives.

SOURCE: The NPD Group Inc./Retail Tracking Service, Jan.-Dec. 2015, THE LICENSING LETTER

## PET PRODUCTS

## As Pet Pampering Grows, Licensing Goes to the Dogs

For evidence of Americans' preoccupation with their pets, look no further than Super Bowl Sunday, when Animal Planet's Puppy Bowl XII (in VR, no less) and Hallmark Channel's Kitten Bowl III filled the hours leading up to the main gridiron event. Or the fact that a Petco survey during the fourth quarter showed that 82% of respondents intended to purchase holiday gifts for their pets. This animal adoration boosted U.S. sales of pet products by 4.4% in 2015, to an estimated \$60.6 billion, according to the American Pet Products Association. Sales of supplies and over-the-counter medicines, a \$14.4 billion category that includes beds, toys and accessories, led the growth, at 4.7%.

TLL estimates that sales of licensed pet products grew 4.8% to \$421 million in 2015.

The emerging trend of pet "parenting" has bolstered demand for premium pet products and services, research firm IBISWorld reports. It has also led to increased demand for specialty products, including toys and other products licensed from fashion, entertainment and celebrity properties, as pet parents seek to share their favorite brands with their pets.

Large chains PetSmart and Petco—which dominate the U.S. pet store channel with a combined market share of more than 60%, according to IBISWorld—tend to pursue exclusive licenses, as demonstrated by Petco's exclusive *Star Wars* Pet Fans Collections.

### Pet Products Chains Snap Up Exclusive Licenses

#### Petco

- ▶ Star Wars
- ▶ Harajuku Lovers by Gwen Stefani
- ▶ Dr. Seuss Pet Fans Collection

#### PetSmart

- ▶ Toys 'R' Us
- ▶ Brett Michaels Pets Rock
- ▶ Martha Stewart Pets
- ▶ National Geographic

Nevertheless, there are several high-profile licensed properties headed to the pet aisle of a wide range of retailers.

- ▶ Among the licensees for Warner Bros.' *Batman v Superman: Dawn of Justice* is Fetch for Cool Pets, whose Web site shows *Batman* and *Superman* balls, as well as a variety of DC Comics aquarium décor. Fetch's other licenses include *Hello Kitty* and *Marvel Comics*.
- ▶ Ellen DeGeneres will extend her ED brand to pet accessories this year through a partnership with Posh Paws. The line, to be introduced at Global Pet Expo in March, will include pet beds, toys, carriers, leads, collars, feeding bowls, sweaters and coats.

Finally, she may not be as warm and cuddly as Ellen, but Lady Gaga also has announced plans (but no details) for a line of dog products including organic food, accessories and, of course, fashion.

## Benchmark Royalty Rates, Guarantees & Advances



### DO YOU KNOW?

- ▶ The average royalty across all property types and product categories?
- ▶ Which three property types earn the highest royalties?
- ▶ Which three product categories pay the highest royalties?
- ▶ The range of guarantees for licensing agreements?
- ▶ How long the average licensing contract runs by property type and product category?

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## DIGITAL CELEBRITIES

### YouTube Creators Move to Series, Movies

YouTube rolled out the first original programming for its three-month-old subscription streaming service, Red, in a move that will generate more traditional long-form series and feature film exposure for some of its top properties.

YouTube's strategy with Red is to fund the passion projects of some of its biggest homegrown stars as a way to generate hit shows, building its subscriber base and diversifying revenues over time. For \$10 per month, Red subscribers get access to the new, original series and movies—putting YouTube in competition with Netflix, Amazon and Hulu—as well as the ability to watch videos across YouTube without ads and save videos to watch offline.

For YouTube's celebrity creators, the longer formats provide an opportunity to deepen their already strong connections with fans, as well as to introduce themselves to new viewers. More viewers can mean greater earnings from a variety of sources including: a share of platform ad revenues and merchandise sales; brand endorsements; sponsored posts; creative consultation and development of personally branded products. While it's rare for digital celebrities to benefit from major licensing programs (Bethany Mota's

Aeropostale relationship and Michelle Phan's personal line with L'Oreal are notable exceptions), many do secure book deals and have merchandising programs with websites such as Spreadshirt or Redbubble.

Among YouTube Red's first four originals, bowing Feb. 10, are a reality-adventure series featuring the world's biggest YouTube celeb, videogame commentator PewDiePie, and a feature-length documentary following vlogger Lilly Singh, aka IISuperwomanII (see chart). Still in development are scripted comedies from Fine Brothers Entertainment and Toby Turner and an adventure reality show featuring Joey Graceffa, among others.

When it comes to series programming, YouTube does not have a monopoly on its creators. Comedian Miranda Sings announced last month that she is creating an eight-episode series for Netflix called *Haters Back Off*. It's the first scripted deal Netflix has done with a YouTube influencer, but it certainly won't be the last. Juan Bruce, writing on *TechCrunch*, explains: "YouTube stars are seemingly custom-created to appeal to Netflix and its digital-savvy customers. Like Netflix, the success of YouTube stars is driven and documented by big data that helps than figure out what resonates with a given audience."

### SELECT SERIES AND MOVIES STARRING YOUTUBE CELEBRITIES

PROPERTY	SOURCE	FOLLOWERS (IN MILLIONS)	DISTRIBUTOR	NOTES
Miranda Sings (Colleen Ballinger-Evans)	YouTube	YT 5.9; Twitter 2.2; FB 1.6; Instagram 3.5	<i>Haters Back Off</i> on Netflix	8-episode comedy series will take a closer look at the family life of the off-key, lipstick challenged Miranda.
PewDiePie (Felix Kjellberg)	YouTube	YT 42.0; Twitter 7.0; FB 6.9	<i>Scare PewDiePie</i> on YouTube Red	In reality-adventure series <i>Scare PewDiePie</i> the gamer encounters terrifying situations inspired by his favorite video games.
IISuperwomanII (Colleen Ballinger-Evans)	YouTube	YT 7.8; Twitter 1.3; FB 2.6; Instagram 3.0	<i>A Trip to Unicorn Island</i> on YouTube Red	Feature-length documentary follows performer Singh as she embarks on a global tour to spread her message about the pursuit of personal happiness.
Joey Graceffa	YouTube	YT 5.7; Twitter 2.7; FB 1.4	Untitled Joey Graceffa Project on YouTube Red	In this reality adventure series, Graceffa will bring together other top YouTubers for a murder mystery.
Tobuscus (Toby Turner)	YouTube	YT 6.4; Twitter 1.3; FB 1.3	<i>I Am Tobuscus</i> on YouTube Red	Scripted comedy will satirize being a YouTube celebrity.

SOURCE: THE LICENSING LETTER

## Who's News

**Pam Lifford** was named President of Warner Bros. Consumer Products. Lifford succeeds **Brad Globe**, who will step down in after more than a decade overseeing WBCP. Meanwhile, **Barry Ziehl** is now EVP Public Affairs & Strategic Initiatives for Warner Bros. Entertainment.

LIMA appointed **Rutika Malaviya** as its official representative for India. **Danny Simon**, President of The Licensing Group, will be inducted into the LIMA Licensing Industry Hall of Fame.

Cherokee Global Brands hired **Randi Spieker** as EVP Business Development.

DHX Brands named **Kaisa Nieminen** Senior Brand Manager for North America. **Dave Tovey** joined the company in the newly created role of Business Development Manager EMEA. And **Danielle Tanton** was appointed to the new role of Live Events & Attractions Manager.

Target hired **Michelle Wlazlo** as SVP Apparel & Accessories.

Women in Toys, Licensing & Entertainment (WIT) hired **Mary Kay Russell** as Executive Director.

Club Red Licensed Apparel appointed **David Harkins** as VP Marketing.

IDW Publishing appointed **Jeff Webber** VP Licensing, Digital & Subsidiary Rights to lead its new internal licensing division.

Minor League Baseball announced that **David A. Wright** has joined as CMO & CCO to lead partnership efforts

Global Brands Group named **Suzy Bizantz** President of premium denim brand Joe's, a newly created position.

Jazwares has bolstered its global outbound licensing team with **Sam Ferguson** as Senior Director Licensing & Retail.

Wolverine World Wide appointed **Pat O'Malley** as President of the Saucony brand. He succeeds **Richie Woodworth**, who was recently appointed President of the Lifestyle Group.

**Joe Whitmore** has been promoted to EVP Worldwide Marketing & Creative Content at Paramount Pictures.

Endemol Shine Group President **Tim Hincks** is set to step down from his post after 17 years at the company.

Precious Moments named **Elisa McDermott** VP Sales and **Jim Kowalczyk** Director E-commerce & Direct Marketing.

Atlantya Entertainment has appointed **Marco Piccinini** as Licensing Manager.

Fullscreen brought on **Pete Stein** as GM & Head Fullscreen Brand Group.

Activision Blizzard brought on **Stacey Sher** as Co-President of the newly created Activision Blizzard Studios division.

SuperAwesome welcomed **Jeff Imberman** as Chief Revenue Officer and **Paul Nunn** as COO.

**Kasper Rorsted**, currently CEO of consumer brand Henkel, will replace **Herbert Hainer** as Adidas AG CEO effective Aug. 1.

DraftKings named **Janet Holian** CMO, giving her oversight of a roster of duties that includes advertising and sponsorships, brand licensing and global marketing.

The Fred Rogers Company has hired **Ellen Doherty** as the new executive in charge of production.

Viacom International Media Networks promoted **Laura Abril** to SVP Youth & Music, as well as VIMN's family brands, for Southern Europe, the Middle East and Africa. **Amalia Martinez de Velasco** is SVP Entertainment Brands. Nickelodeon and Viacom Consumer Products VP Licensing **Stefano Araldi**, will now be responsible for leading the net's licensing, consumer products and recreation business in the regions. VIMN Asia appointed **Amit Arora** as VP Strategy & Business Development. **Yvette Encarnacion** has been promoted to SVP Intellectual Property/Litigation & Business/Legal for Viacom Media Networks.

**Sharon Hall** has been named President of Endemol Shine Studios.

**TLL**

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