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TLL Survey: Corporate Licensing Up Three Percent in 2015 Fueled by Food/Beverage & Automotive

At \$27.6 billion, corporate trademarks and brands accounted for 27% of all retail licensed sales in the U.S. and Canada in 2015, the most of any segment (followed by fashion at 20% and sports at 14%), according to *The Licensing Letter's Annual Licensing Business Survey*. But while it may be big, the corporate segment was also devoid of drama growing at a slow and steady 3.0% clip. Although 2015 growth was higher than the 2.0% by which the segment grew in 2014, it was below the overall U.S./Canada growth rate of 3.4% for all licensed sales. But in spite of modest and uneven growth, no category declined in retail sales.

Steady Growth of "Foodie" Segments

For the sixth straight year in a row, food/beverage outperformed all other corporate trademark and brand segments with 4.5% growth in 2015. Overall, the eating and drinking-related segments continue to represent the growth area in corporate licensing, although the growth of the restaurants segment evened out to a flat 1.5% in 2015 after 3.0% growth in 2014. Combined, the foodie segments make up 11.9% of retail activity for corporate trademark-licensed merchandise (food/beverage leads with 7.4% of the market). For many food/beverage brands, licensing is presenting greater profits than the main business.

Survey respondents list several factors that contribute to the demand of licensed food and beverages:

- ▶ Formal mealtimes are declining in popularity in favor of grazing and snacking. Consumers are favoring 5 or 6 quick meals per day. This in turn creates more opportunity for licensed products to target a wider range of consumers at different times of day.
- ▶ Alongside increased interest in home cooking, driven by driven by cooking shows and social media, is the need for

convenience. Healthy and cost-effective meals are "assembled" rather than pre-packaged or cooked entirely from scratch. And the stigma against frozen foods has lessened thanks to marketing and product extensions from well-established brands.

Continued on page 3

SALARY SURVEY

Licensing Execs Are Satisfied, Gunning for the Long Haul

Licensing professionals are a seasoned lot, happy with their jobs and prepared to put in the hours, according to *The Licensing Letter's 2016 Salary Survey*. Among the findings:

- ▶ Over half of respondents (54%) have been involved in the licensing business for 10 years or more and another 19% for five to 10 years. And this staying power extends to the job itself—55% have been in their current position for five years or more.
- ▶ On a scale of 1 to 10, where 1 is not satisfied and 10 extremely satisfied, 66% of respondents rate their job satisfaction at 7 or higher. Of those who indicate low job satisfaction (22% rate satisfaction at 5 or lower) the most common refrain is the perception that salary is not in line with industry standards, lack of benefits and limited advancement opportunities. Part and parcel of such frustrations is an awareness of economic and organizational limitations.
- ▶ Licensing professionals put in an average of 48 hours at work, with 14% dedicating 60 or more hours a week to their craft.

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➡ Licensing Ledger

STUDIOS TALK UP FUTURE RELEASES AT CINEMACON

Theaters from across the U.S. and around the world met in Las Vegas for CinemaCon, the official convention of the National Association of Theater Owners. Splashy, star-studded presentations and premiere screenings are the norm, and this year was no exception: Disney screened *Captain America: Civil War* in its entirety, Warner Bros. trotted out stars including Amy Adams, Ben Affleck and Will Smith to promote the DC universe and James Cameron appeared for Fox to speak about his *Avatar* plans. News of interest to entertainment licensing executives included:

- ▶ Oscar-winning filmmaker James Cameron told attendees that he has expanded his plan for *Avatar* sequels from three to four. *Avatar 2* will be released at Christmas 2018, with the others at the holiday in 2020, 2022 and 2023. The plan previously was for *Avatar 2* in December 2017, with follow-ups in 2018 and 2019. "I've been working with the top four screenwriters and designers in the world to design the world of *Avatar* going forward," *Deadline Hollywood* reported Cameron as saying.
- ▶ Warner Bros. expounded on its commitment to the DC Comics brand, including confirming a standalone *Batman* sequel to star and be directed by Ben Affleck. Studio chief Kevin Tsujihara said the studio has committed to 10 DC films, most of which have already been announced, in the next five years. Those include *Suicide Squad* (Aug. 2016); *The LEGO Batman Movie* (Feb. 2017); *Wonder Woman* (Jun. 2017); *Justice League, Parts 1 and 2* (Nov. 2017 and Jun. 2019); and *The Flash* (Mar. 2018).
- ▶ The next Spider-Man adventure, created by Sony Pictures and Marvel in partnership, is officially dubbed *Spider-Man: Homecoming*. The film is due in theaters next summer.
- ▶ Universal and Illumination Entertainment showed their new Minions short, *Mower Madness*, which will play with the companies' July release *The Secret Life of Pets* and help buoy consumers' Minions madness until *Despicable Me 3* hits theaters in 2017.

Banijay and Zodiak Media unite their complementary catalogues and production units to form **Banijay Group**. Leading formats and shows include Versailles, The Secret Life of Four Year Olds, Temptation Island, Popstars, Beat Your Host, and 71 Degrees North.

VF Corp. is "exploring strategic alternatives" for its roughly \$550 million Licensed Sports Group business. LSG, which includes the Majestic brand, supplies apparel and fanware through licensing agreements with professional sports leagues, colleges/universities and lifestyle brands. The sale would not include the Image division of VF Imagewear, which produces workwear.

Paint and coatings giant **Sherwin-Williams** has agreed to acquire **Valspar**, another global coatings supplier and a major player in finishing products for furniture, for \$11.3 billion.

Playboy Enterprises is unlikely to get \$500 million for the company, after Hugh Hefner and Rizvi

Traverse Management, the private equity firm that owns a majority stake in the company, decided to weigh bids. Assets include the money-losing monthly magazine, a profitable licensing operation and the LA-based Playboy Mansion.

FilmTrack, a provider of intellectual property and rights management solutions for the media and entertainment industry, acquired **RoyaltyZone**, a software provider of licensing and royalties solutions. RoyaltyZone's software service and staff will be integrated with FilmTrack's, to provide a more robust end-to-end platform to manage the full spectrum of license agreements, rights, products, and royalties.

Viz Media, publisher, distributor and licensor of manga and anime in North America, has partnered with **United Talent Agency** to create a range of live-action programming. Properties include *Naruto*, *One Piece*, *Tokyo Ghoul*, *Bleach*, *Death Note* and *One-Punch Man*.

Mattel forms Mattel Creations.

The new theatrical, TV and digital content creation division will utilize the firm's portfolio of brands to drive content across multiple platforms and be headed by Mattel's Chief Content Officer, Catherine Balsam-Schwaber.

Endemol Shine North America combines its franchise management and licensing integration teams to create the newly formed brand and licensing partnership division.

Joanne Olds of **The Buffalo Works** and Suzanne Cruise of **SCCS** join forces to form a full service licensing agency. While The Buffalo Works will be able to focus more fully on the branding and product development, SCCS will continue to focus on traditional art licensing opportunities.

The Dog Agency is founded by **Loni Edwards** as one of the first talent management agency for influencer pets. Current clients include The Dogist, French bulldog sisters Piggy and Polly, and goldendoodle Samson.



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Corporate Licensing Up Three Percent

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- ▶ The taste for exotic flavors, spices and textures, especially among millennials (including moms) and Gen Z. According to market research publisher Packaged Facts, over 25% of parents learn about new food products from their children.
- ▶ The stealth health and real food movements are growing to promote healthy eating as a lifestyle choice—including gluten-, wheat- and dairy-free, organic and unprocessed foods. Innova Market Insights identifies ‘clear’ packaging, rather than info dumps, as the key trend emerging from 2015 as consumers demand more simplicity and transparency when making food choices. Branding is a large part of this equation, even as off-label products have become more accepted.

On the supply side, the fact that the bulk of activity is licensing into related brand extensions works on several layers. The most obvious factor is the consumable nature of the product—even though royalty rates are lower in this segment than, for example, apparel, high turnover and consumer brand loyalty ensures solid sales. And while shelf space is shrinking for other product categories in brick and mortar, food and beverages are enjoying a boom. Warehouse stores such as Costco, mass retailers such as Walmart—even pharmacies, convenience stores and gas stations—are stepping up their game to ensure they have more space for grocery. And “once brands are on the shelf, they don’t leave,” according to one agent.

Performance of Other Property Types

Sales of automotive properties continued to grow at the same 3.0% clip experienced in 2014, matching the segment-wide growth average. Growth in auto sales following the 2008 financial crash, as well as the popularity of do-it-yourself auto repair and car auction shows, have fueled the growth of automotive licensing on both the property and product side. The category is especially strong in auto accessories, video games/software, toys and apparel.

Corporate property types that were also up in 2015:

- ▶ Hardware/appliance/tools grew 3.6%. This is one of the few sectors where there’s still room for branding, and the opportunities are especially prevalent as the home improvement industry improves.
- ▶ Electronics/technology grew 3.5%, fueled in part by the extension of leading electronics brands into wearable products such as apparel, accessories and sporting goods.
- ▶ Home-related brands enjoyed 2.4% growth, up from 1.0% in 2014.
- ▶ Electronic media grew 2.0% after declining 1.5% in 2014. While most activity for these brands is in

RETAIL SALES OF CORPORATE TRADEMARK-LICENSED MERCHANDISE, BY SECTOR, U.S. & CANADA, 2014–2015 (FIGURES IN MILLIONS)				
SECTOR	RETAIL SALES, 2015	RETAIL SALES, 2014	CHANGE, 2014-2015	SHARE OF MARKET, 2015
Automotive/Motor Vehicle	\$4,139	\$4,018	3.0%	4.0%
Food/Beverage	\$7,595	\$7,268	4.5%	7.4%
Restaurants	\$4,625	\$4,557	1.5%	4.5%
Sporting Goods	\$1,324	\$1,317	0.5%	1.3%
Hardware, Appliance and Tool	\$2,820	\$2,722	3.6%	2.7%
Home-related	\$387	\$378	2.4%	0.4%
Electronics/Technology	\$3,234	\$3,125	3.5%	3.1%
Electronic Media	\$221	\$216	2.0%	0.2%
Other	\$3,301	\$3,249	1.6%	3.2%
TOTAL	\$27,645	\$26,850	3.0%	26.8%

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

co-branding and marketing deals, 2015 saw healthy merchandising activity extending from old partnerships.

All other property types were either flat or down, including sporting goods (0.5%), although sporting goods was up more on the product side.

Performance by Product Categories

The growth in licensing of food properties is matched by growth on the products side. Sales of food/beverage licensed products increased 5.1% in 2015, the largest increase of any product category. At \$9.2 billion, food/beverage constitutes over a third of the market for corporate licensed products in the U.S. and Canada, with most sales coming from the frozen and packaged food aisles. In addition to product extensions from food/beverage-based brands, fitness brands are also finding success as consumer interest in health and fitness grows.

Apparel (3.9% growth, \$2.6 billion total sales) and sporting goods (3.4%, \$1.2 billion) continue to show strength. The rise of athleisure means that sport and fashion are merging to become one category, with jogging suits, yoga garb and running shoes making their way into the wardrobe as everyday wear.

Other key product categories in the corporate segment to post growth above the segment-wide 3.0% average include publishing (3.4%), consumer electronics (3.2%), toys and games (2.3%) and accessories (2.2%). On the flip side, product categories that have been in long-term decline were flat or down in 2015, including gifts/novelties, home furnishings, stationery/paper, domestics and video games/software.

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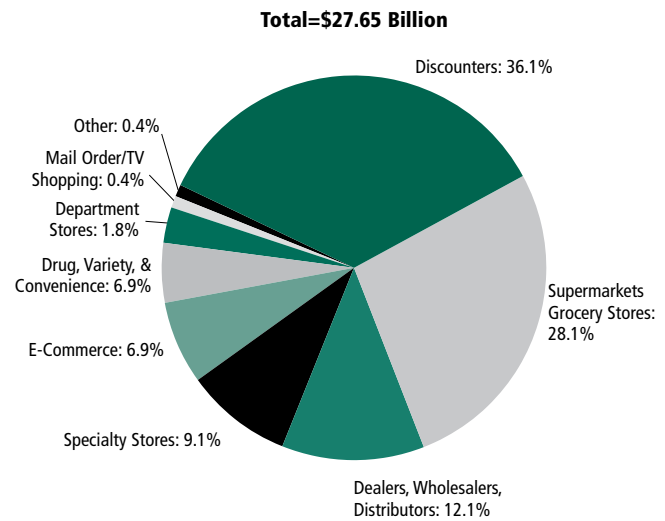
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Sales by Distribution Channel

In terms of distribution, the predominance of traditional brick and mortar channels is especially pronounced in the corporate segment. As in other segments, discount is the biggest channel, accounting for 36.1% of sales. But the corporate sector also relies more heavily on the supermarket and grocery channel, accounting for 28.1% of licensed sales. This channel generated only 12.2% of overall sales of licensed products in the U.S. and Canada. E-commerce is an area of growth for corporate, thanks to shrinking self-space and a lower cost of entry into the digital sphere, accounting for 6.9% of sales.

While traditional retailers tend to overlook corporate brands, *Survey* respondents indicate that the e-commerce arms of large retailers such as Target and digital natives such as Amazon have been enthusiastic about welcoming and providing support to their merchandising programs. Dealers, wholesalers and distributors such as Costco are a stalwart despite declining interest from specialty retailers and department stores.

RETAIL SALES OF LICENSED TRADEMARK/BRAND MERCHANDISE, BY DISTRIBUTION CHANNEL, U.S. & CANADA, 2015



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

RETAIL SALES OF CORPORATE TRADEMARK-LICENSED MERCHANDISE, 2014-2015, BY PRODUCT CATEGORY (FIGURES IN MILLIONS)

PRODUCT CATEGORY	RETAIL SALES 2015	RETAIL SALES, 2014	CHANGE, 2014-2015	SHARE OF MARKET, 2015
Accessories	\$1,871	\$1,831	2.2%	6.8%
Apparel	\$2,569	\$2,472	3.9%	9.3%
Consumer Electronics	\$3,874	\$3,753	3.2%	14.0%
Domestics	\$75	\$74	1.0%	0.3%
Food/Beverages	\$9,158	\$8,712	5.1%	33.1%
Footwear	\$1,671	\$1,650	1.3%	6.0%
Furniture/Home Furnishings	\$859	\$851	1.0%	3.1%
Gifts/Novelties	\$299	\$334	-10.5%	1.1%
HBA	\$986	\$995	-0.9%	3.6%
Housewares	\$507	\$506	0.1%	1.8%
Infant Products	\$219	\$218	0.4%	0.8%
Publishing	\$840	\$812	3.4%	3.0%
Sporting Goods	\$1,164	\$1,126	3.4%	4.2%
Stationery/Paper	\$90	\$95	-5.2%	0.3%
Toys/Games	\$551	\$539	2.3%	2.0%
Video games/Software	\$422	\$510	-17.3%	1.5%
Other	\$2,490	\$2,373	5.0%	9.0%
Hardware and Paint	\$165	\$159	4.0%	0.6%
Gardening	\$112	\$108	3.4%	0.4%
Pet Products	\$209	\$206	1.7%	0.8%
Automotive Accessories	\$366	\$354	3.5%	1.3%
Boats and Vehicles	\$494	\$489	0.9%	1.8%
Other	\$1,144	\$1,057	8.2%	4.1%
TOTAL	\$27,645	\$26,850	3.0%	100.0%

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

REPRESENTATIVE PROPERTIES FOR CORPORATE TRADEMARK BRANDS

- ▶ **Automotive/Vehicle:** BMW, Cadillac, Caterpillar, Chevrolet, Chrysler, Corvette, Dodge, Ferrari, Ford Motor, Harley-Davidson, Hummer, Jaguar, Jeep, John Deere, Kawasaki, Mack Truck, Mercedes Benz, Mustang, Porsche, Winnebago.
- ▶ **Food/Beverage:** Arm & Hammer, Betty Crocker, Blue Diamond, Budweiser, Campbell's, Cheerios, Chiquita, Coca-Cola, Coors, Corona, Del Monte, Dr Pepper/Snapple, Godiva, Green Giant, Hershey, Jack Daniel's, Jim Beam, Kahlua, Keurig, M&Ms, Miller, Mountain Dew, Nathan's, Nestle, Oreo, Pepsi-Cola, Pillsbury, Reese's, Special K, Sunkist, Sun-Maid, Welch's.
- ▶ **Restaurants:** Baja Fresh, Baskin-Robbins, Boston Market, Burger King, California Pizza Kitchen, P.F. Chang's, Cinnabon, Claim Jumper, Dunkin Donuts, Fazoli's, Jamba Juice, La Tasca, McDonald's, Red Robin, Starbucks, Subway, Taco Bell, TGI Friday's, White Castle.
- ▶ **Sporting goods:** Body Glove, Browning, Coleman, Dunlop, Everlast, Polaris, Rawlings, RealTree, Remington, Smith & Wesson, Spalding, Wilson, Winchester, Under Armour.
- ▶ **Hardware/Appliance/Tools:** Black & Decker, Craftsman, DeWalt, Honeywell, Maytag, Snap-On, Stanley, Sunbeam, Westinghouse, Whirlpool.
- ▶ **Home-related:** Croskill, Farberware, Fiesta, Mikasa, Mr. Clean, Pfaltzgraff, Rubbermaid, Waverly, Woolite.
- ▶ **Electronics/Technology:** AT&T, Apple, Emerson, GE, IBM, Philips, Polaroid, RCA, Timex, Verizon, Westinghouse, Xerox.
- ▶ **Electronic media:** Animal Planet, Discovery Channel, ESPN, HGTV, Food Network.
- ▶ **Other:** American Kennel Club, American Tourister, Armor All, Dr. Scholl's, Eveready, Jenny Craig, Linens 'n Things, Samsonite, Scotts MiracleGro, Sharper Image, Toys 'R' Us, Weight Watchers.

CELEBRITY CANNABIS

Branded Weed in Full Bloom

2016 may be the year the market for celebrity licensed marijuana products finally takes off. Marley Natural, the official Bob Marley cannabis brand, went on sale in California in February, with plans to expand to other U.S. states where cannabis is legal in 2016 and internationally in 2017. Whoopi Goldberg's Whoopi & Maya brand, a line of cannabis products created to relieve menstrual pain, is expected to go on sale in California this month; and country music star Willie Nelson's Willie's Reserve "legendary stash" is due to go on sale in Washington and Colorado sometime this year.

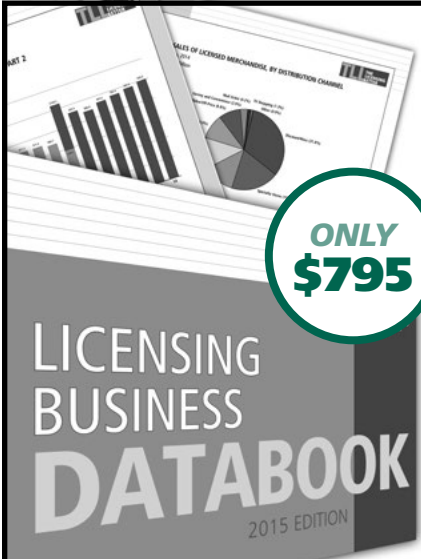
The activity follows the November launch in Colorado of Leafs by Snoop, a line of smokables and edibles from Snoop Dogg, the rapper who is building a small business empire out of weed. In each of these cases, the brands are at least partly owned by the celebrities, rather than strictly licensed, but industry observers expect licensing to broaden in the category, with music, video game and entertainment brands considered the most likely matches for marijuana products and accessories.

In case you were wondering, the Cheech and Chong movie *Up in Smoke* is licensed by Paramount Pictures for smoking accessories. (The studio would never license *Up in Smoke* for actual marijuana strains, however, a source told TLL.)

At stake is share of a rapidly expanding market, with 86% of Americans living in states that allow some degree of legal marijuana use, according to ArcView Market Research and New Frontier Data. That includes three states that allow legal adult recreational use (Washington, Oregon and Colorado) and 23 plus the District of Columbia that allow medical use. National legal sales grew to \$5.7 billion in 2015, up from \$4.6 billion in 2014, according to the market research firms. They expect the legal market to grow 26% to \$7.1 billion this year and to \$22 billion by 2020 as more states legalize marijuana.

So, expect more celebrities to jump on board as legal tussles over unlicensed use of brands on marijuana grow. *High Times'* 2014 list of the "40 Strongest Strains of All Time" included the surely unlicensed Bruce Banner #3, Girl Scout Cookies (Thin Mints), Master Yoda, Tiger's Milk and Hello Kitty strains. Here's the breakdown on the current state of celebrity marijuana marketing:

- ▶ **Whoopi Goldberg:** Created the Whoopi & Maya brand with ganjapreneur Maya Elisabeth of Om Edibles. Their line, to be sold through California medical dispensaries beginning this month, includes a THC-infused bath solution, topical rubs, tinctures and cannabis edibles.
- ▶ **Betheny Frankell:** The *Real Housewives* star told *Us* magazine last year that she has plans to extend her Skinnygirl brand to a strain of pot engineered not to give the munchies (but so far that seems like only so much smoke).
- ▶ **Bob Marley:** Marley Natural products available initially in California include four categories of cannabis flowers and oil; body care products that combine hemp seed oil with Jamaican botanicals; and a collection of smoking, storage and preparation accessories.
- ▶ **Willie Nelson:** The website for the singer's company, Willie's Reserve, shows three varieties of "legendary stash" that it promotes as "Coming soon to Colorado, Washington and everywhere voters say yes."
- ▶ **Snoop Dogg:** Leafs by Snoop (aka LSB) is backed by Casa Verde Capital, a venture capital group in which the rapper is a managing member. He also reportedly has invested in medical-marijuana delivery startup Eaze and the packaging company FunkSac. He lends his name to a line of Gresco Double G vape pens and started the cannabis culture website Merry Jane.



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Licensing Execs Are Satisfied

Continued from page 1

The titles with the greatest amount of responses are director (32%), manager (20%), VP (13%), coordinator (8%) and SVP (6%). These are the only job titles for which the number of responses is sufficient to generate salary and bonus data. Even limited to these categories, however, titles are not used consistently in licensing. For example, a director in a very large company could be equivalent to a VP at a smaller one (and size isn't the only differentiator). Unlike in other industries, titles don't always correlate with responsibilities. The range of responses in compensation is one indicator—e.g., \$74,000–230,000 for VPs and \$25,000–140,000 for managers. In the case of managers, the low end of that range would likely be a coordinator or assistant at some companies, yet a junior director at others.

Other than the salary and bonus questions, specifically, there was little difference in the response of these and other titles, and so, other than salary and bonus, responses in this analysis are across all titles.

Geography

Among U.S. respondents, 31% of licensing executives are located on in the mid-Atlantic and 28% on the West Coast. The Midwest accounts for 12% while a smaller percentage call the Southeast (9%) and New England (6%) home.

Overall, 27% work outside of the U.S. Although every region of the world was well represented, most international respondents are based in Europe (62%).

Responsibilities

While 66% of respondents indicated that their primary function is licensing, 14% also have a hand in business development and 9% in product development. Rounding out job responsibilities are marketing (5%), finance (2%), sales (1%) and public relations (1%).

Education

More than half (56%) of respondents hold a bachelor's degree, 18% have MBAs and 13% have other master's degrees.

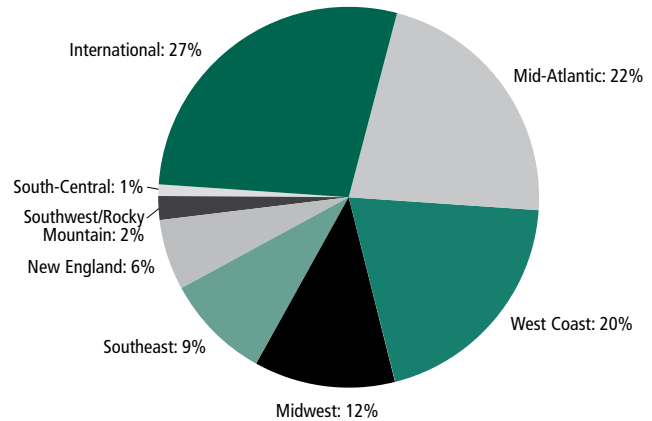
LICENSING BUSINESS SALARIES, BONUS AND HOURS FOR SELECTED TITLES, 2015				
TITLE	SALARY	BONUS*	RANGE IN SALARY	HOURS WORKED PER WEEK
SVP	\$257,000	\$38,000	\$95,000–552,000	51
VP	\$153,000	\$20,000	\$74,000–230,000	53
Director	\$102,000	\$12,000	\$45,000–174,000	49
Manager	\$68,000	\$9,000	\$25,000–140,000	46
Coordinator	\$39,000	\$1,500	\$18,000–60,000	42
Total Average†	\$110,000	\$21,000	\$10,000–450,000	48

NOTES: *Among those who received bonuses; a minority of respondents specified that they were not paid bonuses.

†Total average calculated across all titles.

SOURCE: THE LICENSING LETTER

WHERE LICENSING EXECUTIVES ARE BASED, 2015



SOURCE: THE LICENSING LETTER

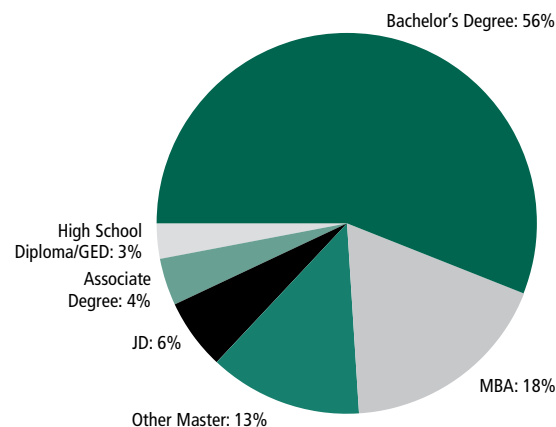
Executives who work as licensors, licensees and agents have similar educational backgrounds (roughly 60% hold a bachelor's and 30% a master's degree). Consultants are the most educated cohort, with 67% holding a master's degree. 17% of consultants hold a JD versus an average of 5% for all other licensing executives.

A higher percentage of men hold JDs than women (13% of men vs. 2% women), but otherwise educational level is equal across the board.

Bonuses

Most (67%) respondents expect to receive a bonus in the next 12 months. Company performance is cited as the most important factor in receiving a bonus (74%), followed by overall personal performance (46%), new business

LEVEL OF ACADEMIC ACHIEVEMENT FOR LICENSING EXECUTIVES, 2015



SOURCE: THE LICENSING LETTER

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and royalties generated (40% each), sales of licensed lines (28%) and other predetermined factors (17%—multiple responses permitted).

Size of Licensing Operation

Sixty-two percent of companies responding have one to five full-time or full-time equivalent employees directly involved in licensing; 22% have six to 20.

Half (49%) say that the number of employees involved in licensing at their company or division is the same as it was a year ago; 31% say the head count is higher and 20% lower.

Other Forms of Compensation

Although companies were quick to embrace alternate forms of compensation after the recession to make up for the lack of raises or bonuses, today that trend has gone to the way-side.

Of the small number of companies that do offer benefits, the most common are flexible working hours (including flexibility to work from home, generous vacation policies, paid time off and extra days off), equity, 401K plans, commissions, free lunches and travel.

Gender

According to respondents, all is well for gender parity in licensing. Men and women work the same hours and draw the same salary, after adjusting for title.

Although 60% of respondents are women, they occupy a smaller share of the top titles. While 16% of women hold titles of VP and higher, 51% of male respondents claim the same. Two-fifths of female respondents are a director (43%), versus 18% of men holding the same title. And they aren't lacking in seniority (roughly half of each gender have been involved in licensing for 10 years or more).

A higher percentage of men hold JDs than women (13% of men vs. 2% women), but otherwise educational level is equal across the board.

ABOUT TLL'S 2016 SALARY SURVEY

Respondents to *TLL's 2016 Salary Survey* were evenly distributed amongst licensors, licensees, agents and consultants, with a smaller percentage of respondents making up the last cohort. The *Survey* was conducted in early 2016 and responses are for 2015.

As a group, the licensors and agents responding work with every property type TLL tracks, but there is a slightly larger involvement in entertainment/character- and trademark-based brands whose activity takes up a larger share of the licensing industry. In the same vein, manufacturers are slightly more involved in the product categories of apparel, gifts/novelties, accessories and toys/games.

The titles tracked in this survey are owner/partner, president, CEO, EVP, SVP, VP, general manager, director, manager, account executive, coordinator and assistant.

SOCIAL BRANDING

Giorgio Armani Becomes Latest High Profile Fashion Designer to Go Fur Free

Respondents to *TLL's Annual Licensing Business Survey* have waxed poetic about the need for personal connection between brand and customer for years.

But while the objective remains the same, the tactics are changing. Forging personal connections now requires engagement at the community level.

"Today's consumer judges brands not just by quality but the social values they represent," according to one *Survey* respondent.

Fur Free Fashion

Fashion licensors have been among the most scrupulous in aligning their brands with the right causes (or at least in making sure their brand isn't associated with the wrong ones). Environmental and animal protection causes

are particularly big in the fashion space. The Armani Group made an agreement with The Humane Society and Fur Free Alliance to stop using fur in all of its products starting with its fall 2016 collections.

In a public statement, Giorgio Armani said the move reflects the company's "attention to the critical issues of protecting and caring for the environment and animals."

Armani is hardly alone. Other high profile fashion designers and brands that have recently adopted fur free policies include Hugo Boss, Calvin Klein, Tommy Hilfiger, Stella McCartney and Ralph Lauren.

Fur free fashion is gaining strength and may be a harbinger of how social causes will shape brands in the years ahead—in not only fashion but all licensing sectors.

Licensing News

Properties Available Or Recently Assigned, U.S.

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Amy Reber	Surface and textile designer and illustrator known for her rich colors and bold patterns.	All	John Mavrakis, Ideaologie
Cristina Ferrare	Author, chef and TV personality known for her expertise in women's health, wellbeing, culinary arts and stylistic design.	Cookware, health & beauty aids, home decor	Cynthia Modders, Firefly Brand Management
Darren Gygi	Fine artist known for his boldness, flair and vivid expression who currently produces canvas wrap wall decor based on his portfolio.	Bedding, gifts, home decor, stationery	Marty Segelbaum, MHS Licensing + Consulting
Don Weller	Painter specializes in Western America scenes, from hills of rock to wide ranch lands to horses.	All	John Mavrakis, Ideaologie
Maeve Rochford	American celebrity chef and champion of the 2015 Holiday Baking Championship on Food Network.	All	Paul Leonhardt, Coastal Limited
Pig Goat Banana Cricket	Animated series follows the daily adventures of the titular characters in a metropolis called Boopelite City.	All	Manuel Torres, Nickelodeon & Viacom Consumer Products
Rebecca Stoner	Designer creates patterns, illustrations and artwork for fabric, homewares, stationery and laser cut metal in the U.K.	Gifts, home decor, stationery, wall coverings	Marty Segelbaum, MHS Licensing + Consulting
San Diego Tourism Authority	Seaside city's tourism brand includes marketing campaign Happiness is Calling.	All	Paul Leonhardt, Coastal Limited
Sugar & Scribe Bakery	La Jolla, Calif. bakery owned by celebrity chef Maeve Rochford.	All	Paul Leonhardt, Coastal Limited
University of South Carolina	State university with products in over 4,300 retail locations across the country. Renewed for 5 yrs.	All	Cory Moss, Collegiate Licensing Co. (CLC)

Licenses Recently Granted, U.S.

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Angry Birds	H2W/Sun-staches	Novelty sunglasses	Rovio Entertainment
Asterix & Friends	Bandai Namco Entertainment U.K.	Online games	Albert René Editions
Batman v Superman: Dawn of Justice	JAKKS Pacific*	Large scale figures	Warner Bros. Consumer Products
Beetlejuice	Mezco Toyz	Plush	Warner Bros. Consumer Products
Best Friends Animal Society	Skechers U.S.A.	Sneakers	Best Friends Animal Society
Black Panther	Artissimo Designs	Wall art	
	C-Life Group	Apparel	
	Diamond Select Toys & Collectibles	Figures	
	Fast Forward	Bags	
	Fifth Sun	Apparel	
	Freeze div. Central Mills		
	Funko	Bobbleheads, plush, vinyl collectibles	
	Global Design Concepts	Bags	
	Hasbro	Action figures, role play, toys	
	LEGO Systems	Construction block sets	
	Mad Engine	Apparel	
	Monogram Intl.	Novelties	
	Party City	Costumes	
Pyramid Intl.	Wall art		
Rubie's Costume	Costumes		
Caitlyn Jenner	H&M Hennes & Mauritz AB	Athletic apparel	Creative Artists Agency (CAA)
Captain America: Civil War	Her Universe/The Araca Group	Activewear (women's)	Disney Consumer Products
Cartoon Network	Cryptozoic Entertainment*	Card games	Cartoon Network Enterprises
Celebrity Chef Jason Santos	Buzzy	Gardening grow kits	C3 Entertainment
Country Diary of an Edwardian Lady	Tide-Mark Press	Calendars	RJM Licensing
Dean Russo	SJT Enterprises	Plaques	Art Licensing Intl.
Empire	Defend Paris	T-shirts	20th Century Fox Consumer Products
Fantastic Beasts & Where to Find Them	HarperCollins Children's Books	Books	Warner Bros. Consumer Products
FC Barcelona	Nordcurrent Group UAB	Mobile game apps	One Entertainment
Finding Dory	Trina Turk	Accessories, beach & resort wear, handbags, swimwear	Disney Consumer Products

*Extension or renewal.

Continued on page 9

Licensing News *Continued from page 8*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Five Nights at Freddy's	Buckle-Down Inc.	Belt buckles, belts, key chains	Striker Entertainment
	McFarlane Toys	Play sets	
	National Entertainment Collectibles Association (NECA)	Blankets, gift sets, lighting, lunch boxes, role playing games, wall art	
	Rubie's Costume	Costumes, Halloween decor, masks, pet costumes, prop replicas, trick-or-treat bags	
	Trends International	Bookmarks, calendars, gift wrap, posters, stickers, temporary tattoos	
Gas Monkey Garage	International Game Technology (IGT)	Lottery tickets	Brandgenuity
Happi By Dena	CSS Industries/Paper Magic/CR Gibson	Gifts, keepsakes	Joester Loria Group
Harry Potter	New York Puzzle Co.	Puzzles	Warner Bros. Consumer Products
I Love Lucy	Alchemy 3	Lottery tickets	Unforgettable Enterprises
	Aliz Intl.*	Accessories, handbags	
	Bradford Exchange*	Collectibles	
	Fun World div. Easter Unlimited*	Party goods	
	Royal Bobbles	3D laser crystals, bobbleheads, key chains	
	Signorelli	Tops (juniors')	
	Vermont Teddy Bear dba PajamaGram	Pajamas (women's)	
Zynga	Social casino games		
Isaac Mizrahi New York	MiWorld Accessories	Travel accessories	Xcel Brands
Jungle Book (The)	Kenzo	Apparel	Disney Consumer Products
Konami	Playstudios	Mobile slots apps	Konami Digital Entertainment
Laura Marano	Evy of California	Outerwear (girls'), sportswear (girls')	Disney Consumer Products
LEGO Jurassic World	TT Games div. Warner Bros.	Mobile game apps (Android & iOS)	Warner Bros. Consumer Products, LEGO Systems
MasterChef	Unibrands	Bbq sets, grill covers, oven mitts, spatulas	Brand Central
MasterChef Junior	Unibrands	Bbq sets, grill covers, oven mitts, spatulas	Brand Central
Me to You	Kimm & Miller	Food, gift boxes	Carte Blanche Greetings
Mean Girls	FunKo	Toy figures	Paramount Pictures
NASCAR	Lucky Brand Jeans	T-shirts (men's)	NASCAR
New York Botanical Garden (The)	Surface View div. Vinyl Graphics Ltd.	Home decor, wall decor	Jewel Branding & Licensing
NFL Players Association	Artisan House NY div. Fab NY	Backpacks, bags, banks, handbags, luggage, stationery	NFLPA
	FiveLo Sports	Arm warmers, cold weather accessories, headbands, leg warmers, scarves, socks	
	Mystic Apparel div. Wiesner Products	Canvas shoes & sandals, flip flops, footwear, sandals, slippers	
	Panini America*	Trading cards	
	Williams Industries	Drinkware	
Paw Patrol	H2W/Sun-staches	Novelty sunglasses	Nickelodeon & Viacom Consumer Products
Powerpuff Girls (The)	Hot Topic	Apparel	Cartoon Network Enterprises
	IDW Publishing	Comic books	
Sesame Street	Crocs	Charms, clogs	Sesame Workshop
	Quiksilver	Cold weather gear, goggles, helmets, jackets, mittens, snow suits, winter accessories	
Shoppies	Bridge Direct (The)	Construction toys	Licensing Shop (The)
	Disguise	Halloween costumes	
Skechers	EB Brands, Brandgenuity	Fitness equipment & accessories, wellness products, workout gear, yoga accessories	Skechers U.S.A.
Star Trek	Franklin Mint div. Sequential Brands Group	Chess sets	CBS Consumer Products
Tatty Teddy & My Blue Nose Friends	Kimm & Miller	Food, gift boxes	Carte Blanche Greetings
Teenage Mutant Ninja Turtles	Magformers	Building toys	Nickelodeon & Viacom Consumer Products
	MEGA Brands/Mattel	Construction toys	
	Playmates Toys	Figures, play sets, role play, toys	
Ultimate Spider-Man vs. Sinister Six	Campbell Soup	Soups	Disney Consumer Products
World of Eric Carle (The)	Custom Personalization Solutions	Custom on-demand products	Joester Loria Group
	Zazzle	Custom on-demand products, gifts, home decor	
WWE	Petmate/Doskocil Manufacturing	Collars, pet accessories, pet beds, pet toys	World Wrestling Entertainment (WWE)

Continued on page 10

Licensing News *Continued from page 9*

International Properties Available or Recently Assigned

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Angelo Rules	Animated book-based cartoon TV series stars a 12 year-old boy whose crazy antics and plans help him take control of his daily life.	All (Germany)	Hendrik Rinsche, Super RTL
Auburn University	155 year-old Alabama university with merchandise in over 6,000 retailers nationwide.	All (Worldwide; 8 yrs.)	Cory Moss, Collegiate Licensing Co. (CLC)
BFG (The)	Film adapted from Roald Dahl's children book of the same name will premiere in Spain on July 8.	Apparel, gifts, home goods, stationery, toys (Spain)	Ignacio Segura de Lassaletta, Planeta Junior (Spain)
Cartoon Network	Portfolio of animated properties includes Adventure Time, The Powerpuff Girls and The Amazing World of Gumball.	All (France, Germany, Switzerland, Austria, Benelux)	Angela Farrugia, Licensing Company, U.K. (The)
Chuck E. Cheese's	Nationwide family entertainment destination features musical entertainment, games, rides, and play areas for kids as well as dining.	All (Worldwide)	Cynthia Modders, Firefly Brand Management
Dean Martin	American singer, actor, comedian, and film producer known as the "King of Cool."	All (Worldwide)	Ashley Austin, Artist Legacy Group (ALG)
LoliRock	French animated TV series follows three girls who are rockstars by day and magical girls by night as they fight to save their kingdom.	All (Italy)	Andrea Zignone, De Agostini Editore S.p.A.
Maggie & Bianca Fashion Friends	Live action TV series tells the story of an American girl who wins a scholarship to a Milan fashion academy and her friendship with a self-proclaimed Italian princess.	All (Worldwide)	Cristiana Buzzelli, Rainbow S.r.l.
Miraculous: Tales of Ladybug & Cat Noir	3D CGI comedy action TV series stars two superhero teens tasked with saving Paris who don't know each other's true identities.	All (France) All (South Korea) All (Japan) All (Iberia, CEE) All (Italy) All (Benelux) All (GAS) All (U.K., Eire) All (Nordics, Russia) All (South Africa) All (Israel) All (Australia) All (Canada) All (Brazil) All (Chile, Peru)	Guillaume Lascoux, TF1 Entreprises Su Hoon Kim, SAMG Animation Studio Masayuki Endo, Toei Animation Diego Ibáñez Belaustegui, Planeta Junior (Spain) Andrea Zignone, De Agostini Editore S.p.A. Jannienke Mulder, J&M Brands Cindy Birdsong, Brand Licensing Team Vicky Hill, Bulldog Licensing Eva Brannstrom, Plus Licens AB Graham Stephen, Character Licensing & Marketing (CLM) Avi Morgenstern, Mediogen Thomas Punch, Haven Licensing Stuart Pollock, Segal Licensing Ana Kasmanas, Kasmanas Licensing Jose Donoso, Doce & Friends
Molang	Short-form TV series stars a cute rabbit and his best friend, a chick, as they explore their unique take on happiness and friendship.	All (U.K., Ireland)	Ian Wickham, Licensing Link Ltd.
National Park Service	U.S. agency charged with preserving the natural resources of America. Centennial Anniversary program covers natural wonders, monuments and history of 409 national parks visited by over 290 million people each year.	All (Worldwide)	Rob Striar, M Style Marketing
Rachael Hale	Animal photography licensed in greeting cards, calendars, bedding and novelties.	Apparel, food, pet accessories, wall art (U.K., Ireland)	Ian Downes, Start Licensing
Rubik's Cube	Classic multi-colored brain teaser toy with heritage and iconicity in 1980's pop culture.	All (excl. puzzles) (Worldwide)	Nicolas Loufrani, SmileyWorld
Shoppies	New doll line from Moose toys is TV promoted and featured in webisodes & entertainment.	All (U.S., Canada)	Stephen Fowler, Licensing Shop (The)
Survivorman	TV show 15 years in production starring outdoorsman and survival expert Les Stroud, who permits himself to be stranded for a week in a remote location.	All (Worldwide)	Wendy Turner, Les Stroud Productions
World of Winx	TV show stars the characters of Winx Club as they visit Earth as scouts for a talent show.	All (Worldwide)	Cristiana Buzzelli, Rainbow S.r.l.

International Licenses Recently Granted

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Adventure Time	Dr. Martens/AirWair Intl.*	Boots (Worldwide)	Cartoon Network Enterprises
Aerosmith	Liquid Blue Shinsung Tongsang	T-shirts, tie dye t-shirts (North America) Sweatshirts, t-shirts (South Korea)	Epic Rights
Alien	Dark Horse Comics* Fright Rags Hollywood Collectibles Hot Toys Ltd. Insight Editions Kotobukiya Loot Crate	Comic book series (Worldwide) Apparel (Worldwide) Collectibles (Worldwide) Figures (Worldwide) Books (Worldwide) Figures (Worldwide) Subscription service (Worldwide)	20th Century Fox Consumer Products

*Extension or renewal.

Continued on page 11

Licensing News *Continued from page 10*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Alien	National Entertainment Collectibles Association (NECA)*	Figures, figurines (Worldwide)	20th Century Fox Consumer Products
	Reebok Intl.	Shoes, sneakers (Worldwide)	
	Super7	Books (Worldwide)	
	Titan Publishing/Titan Entertainment	Novels (Worldwide)	
	Upper Deck Collectibles & Upper Deck Authenticated	Collectible cards (Worldwide)	
	USAOPOLY	Games (Worldwide)	
	Zen Studios	Mobile game apps (Worldwide)	
American Girl	MEGA Brands/Mattel	Construction block sets, mini figures (U.S., Canada)	American Girl
Angry Birds	BBS S.p.A.	Party goods (Italy)	Maurizio Distefano/The Evolution of Licensing
	Fabri Editori/RCS Libri S.p.a.	Books, puzzle books, sticker books (Italy)	
	Ravensburger AG	Games, puzzles (Italy)	
	Wal-Cor Corsanini S.n.c.	Chocolate candy, Christmas decorations, Easter eggs (Italy)	
Assassin's Creed	Advanced Micro Devices (AMD)	VR experiences (Worldwide)	Ubisoft Entertainment
	Penguin Random House (U.K.)*	Books (U.K.)	
Batman v Superman: Dawn of Justice	Build-A-Bear Workshop	Plush (U.S., Canada, U.K., Australia)	Warner Bros. Consumer Products
Beryl Cook	Carousel Calendars div. Otter House Group	Gifts, stationery (U.K.)	This is Iris
Beyonce	Topshop/Top Man div. Arcadia Group Ltd.	Jackets, leggings, sportswear, sweatshirts, t-shirts (U.K.)	Global Merchandising Services
Billboard	Fierce Publishing Co. Ltd.	Magazines (Thailand)	Hollywood Reporter (The)/Billboard Media Group
Billy Idol	Angotti Designs (Rowdy Sprout)	Accessories (children's, infants'), apparel (children's, infants'), bibs, blankets, burp cloths, diaper covers, dresses, hats, onesies, pajamas, rompers (U.S., Canada, France, Ireland, Japan, Mexico, Spain)	Epic Rights
Bing	Blueprint Collections	Back-to-school (U.K.)	Licensing Company (The)
	Dreamtex	Bedding (U.K.)	
	HTI Group	Toys (U.K.)	
	Spearmark Intl. Ltd.	Housewares (U.K.)	
	TVM Fashion Lab div. Global Brands	Apparel (U.K.)	
Blaze & the Monster Machines	Alfred Franks & Bartlett Plc.	Sunglasses (U.K.)	Nickelodeon & Viacom Consumer Products
	Amscan Intl.	Balloons, partyware (U.K.)	
	Aykroyd & Sons Ltd.	Nightwear, underwear (U.K.)	
	Character World/TDS Enterprises	Accessories, bedding, beds (U.K.)	
	Clementoni UK Ltd.	Interactive learning, puzzles (U.K.)	
	Delta Children's Products	Beds, chairs, storage (U.K.)	
	Drew Pearson (Europe) Intl.	Headwear (U.K.)	
	Kokomo Ltd.	Health & beauty aids (U.K.)	
	Lightbody Ventures Ltd.	(U.K.)	
	Ninja Jump	Inflatables, play tents (U.K.)	
	Roy Lowe & Sons Ltd.	Socks (U.K.)	
	Sambro Intl.	Arts & crafts, games, pocket money, puzzles, stationery (U.K.)	
	TDP Textiles	Nightwear, underwear (U.K.)	
TVM Fashion Lab div. Global Brands	Outerwear (U.K.)		
William Lamb Footwear	Footwear (U.K.)		
Care Bears	Character World/TDS Enterprises	Bedding (U.K.)	American Greetings Entertainment
CBGB	Angotti Designs (Rowdy Sprout)	Accessories (children's, infants'), apparel (children's, infants'), bibs, blankets, burp cloths, diaper covers, dresses, hats, onesies, pajamas, rompers (U.S., Canada, France, Ireland, Japan, Mexico, Spain)	Epic Rights
CBGB	Shinsung Tongsang	Sweatshirts, t-shirts (South Korea)	Epic Rights
Country Diary of an Edwardian Lady	Great British Card Co.	Greeting cards (U.K.)	Copyrights Group (The)
	Personalised Memento Co.	Candles, ceramics, Christmas decorations, gifts (U.K.)	
	Samuel Lamont & Sons Ltd.	Aprons, home textiles, oven mitts, tea towels (U.K.)	
	Rizzoli Intl. Publications	Books (Worldwide)	
Dark Souls III	Numskull div. Rubber Road Ltd.	Hats, mugs, t-shirts (U.K.)	Bandai Namco Entertainment Europe S.A.S.
Def Leppard	Shinsung Tongsang	Sweatshirts, t-shirts (South Korea)	Epic Rights
Disney Cars	Cartamundi Group*	Games (Worldwide)	Disney Consumer Products
Disney Princess	Cartamundi Group*	Games (Worldwide)	Disney Consumer Products

*Extension or renewal.

Continued on page 12

Licensing News *Continued from page 11*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Fantastic Beasts & Where to Find Them	Insight Editions	Books, novelty books (Worldwide)	Warner Bros. Consumer Products
	Scholastic Media	Books (Worldwide)	
Farah	MRH SpaRotica Groupe	Accessories (men's), apparel (men's; China)	Perry Ellis Intl./PEI Licensing
Finding Dory	DKL Marketing Ltd.*	Scented markers, scented pencils, scented pens (U.K.)	Disney Consumer Products
Godolphin	Under Armour	Sportswear (Worldwide)	Godolphin
Gorjuss	CYP Imports	Alarm clocks, dolls, hair accessories, jewelry boxes, lunch kits, nail products, watches (Spain)	Santoro Licensing
	Keskin Color	Back-to-school, stationery (Turkey)	
	La Fabbrica delle Idee/Pon Pon Edizioni*	Books (Greece)	
	Lorenay SL	Fragrance, toiletries (Spain)	
	Pictura Sarl*	Greeting cards (France)	
	Preca Brummel S.p.A.*	Activewear (girls'; Worldwide)	
Hello Kitty	ZÜCA	Luggage, sports bags, travel accessories (U.S., Canada, Puerto Rico, Japan)	Sanrio
Hollywood Reporter (The)	Fierce Publishing Co. Ltd.	Magazines (Thailand)	Hollywood Reporter (The)/Billboard Media Group
Isaac Mizrahi New York	Signal Brands*	Luggage (U.S., U.K., Australia)	Xcel Brands
JCB	IglooBooks*	Activity books, picture books, sound books (children's; U.K.: 3 yrs.)	JCB Consumer Products
Jefferson Airplane	Angotti Designs (Rowdy Sprout)	Accessories (children's, infants'), apparel (children's, infants'), bibs, blankets, burp cloths, diaper covers, dresses, hats, onesies, pajamas, rompers (U.S., Canada, France, Ireland, Japan, Mexico, Spain)	Epic Rights
John Lennon	Ecell Global Ltd.	Charging cables, phone cases, sports armbands, tablet cases, watch straps (North America, Australia, Europe, Japan)	Epic Rights
Justin Bieber	Dreamtex	Home textiles (U.K.)	Bravado Intl. Group Merchandising Services
Kellogg's	Peter Alexander div. Just Group	Loungewear, sleepwear (ANZ)	Joester Loria Group
KISS	Imaginarium Goods	Party goods (North America)	Epic Rights
	King Monster	Caps, hoodies, t-shirts (Mexico)	
Kori Kumi	Educa Borrás SA	Jigsaw puzzles (Spain, Portugal)	Santoro Licensing
	Pictura Sarl*	Greeting cards (France)	
LEGO	UNIQLO	T-shirts (U.K.)	LEGO Systems
Maggie & Bianca Fashion Friends	Arnoldo Mondadori Editore Spa	Activity books, books, novels (Italy)	Rainbow S.r.l.
	Simba Toys	Master toy (Europe)	
Marmite	Carousel Calendars div. Otter House Group	Calendars (U.K.)	Unilever U.K.
Masha and the Bear	PreGel S.p.A.	Ice cream (Italy)	Maurizio Distefano/The Evolution of Licensing
	Swiss Eyewear Group Italia S.r.l.	Eyewear (Italy)	
Mirabelle	Pictura Sarl*	Greeting cards (France)	Santoro Licensing
Miraculous: Tales of Ladybug & Cat Noir	Action Lab Entertainment	Comic books, graphic novels (North America)	Carlin West Agency (CWA)
National Gallery	Wild Bangarang	Apparel, leggings (U.K.)	JELC Ltd./Blue Trellis
Next Step (The)	Danilo Promotions Ltd.	Calendars (U.K.)	Brands With Influence
	IglooBooks	Annuals, books, novels (U.K.)	
	Signature Publishing Ltd.	Magazines (U.K.)	
	TVM Fashion Lab div. Global Brands	Apparel (U.K.)	
NFL Players Association	Global Leisure Concepts	Hoodies, t-shirts (Australia)	NFLPA
	Ziporex	T-shirts (Mexico)	NFLPA
Paw Patrol	Egmont (U.K.)	Magazines (U.K.)	Nickelodeon & Viacom Consumer Products
Perry Ellis	Prestige Fashion/Multimoda Import	Apparel, outerwear, sportswear, swimwear (Central & South America, the Caribbean, Mexico)	Perry Ellis Intl./PEI Licensing
Peter Pan	Mamas & Papas	Apparel, dresses, leggings, rompers (U.K.)	Disney Consumer Products
Playboy	Changshu Daguan	Pens (China (excl. Hong Kong, Taiwan, Macau))	Playboy Enterprises
	Fresh Side Ltd. dba Chunk Clothing	Headwear, hoodies, outerwear, shorts, t-shirts (Austria, Baltics, Benelux, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Malta, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, U.K.)	
	MC2 Saint Barth	Swimwear, t-shirts (Belgium, Benelux, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Finland, France, GAS, Greece, Hungary, Ireland, Italy, Luxembourg, Malta, Netherlands, Norway, Poland, Portugal, Romania, Russia, Slovakia, Slovenia, Spain, Sweden, Turkey, U.K., Ukraine, Saint Barthelemy, Mexico, Indonesia)	

*Extension or renewal.

Continued on page 13

Licensing News *Continued from page 12*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Pusheen the Cat	B.M. Fashion Ltd. t/a Fashion U.K.	Apparel, daywear, nightwear, socks, underwear (U.K.)	Fluid World Ltd.
	Poetic Gem div. PDS Multinational Group	Apparel (women's; U.K.)	
	TVM Fashion Lab div. Global Brands	Daywear, nightwear, swimwear (U.K.)	
REO Speedwagon	Angotti Designs (Rowdy Sprout)	Accessories (children's, infants'), apparel (children's, infants'), bibs, blankets, burp cloths, diaper covers, dresses, hats, onesies, pajamas, rompers (U.S., Canada, France, Ireland, Japan, Mexico, Spain)	Epic Rights
Shopkins	Trends U.K. Ltd.	Construction toys (U.K.)	Bulldog Licensing
Smiley World	Gruppo Edicart S.r.l.	Books (Italy)	SmileyWorld
Styx	Angotti Designs (Rowdy Sprout)	Accessories (children's, infants'), apparel (children's, infants'), bibs, blankets, burp cloths, diaper covers, dresses, hats, onesies, pajamas, rompers (U.S., Canada, France, Ireland, Japan, Mexico, Spain)	Epic Rights
T.Rex	Shinsung Tongsang	Sweatshirts, t-shirts (South Korea)	Epic Rights
Toddler Time	Top That Publishing div. Tide Mill Media Group	Novelty books (Worldwide)	HoHo Entertainment Ltd.
Valentino	Luxottica	Eyewear (Worldwide; 10 yrs.)	Valentino S.p.A.
Victoria & Albert Museum	Caffè Nero Group Ltd.	Gift cards (U.K.)	V&A (Victoria & Albert Museum)
	Caspari	Paper goods (plates & napkins; U.K.)	
	Clarks	Shoes (U.K.)	
	Ehrman Kits	Gift cards (U.K.)	
	Oasis/Andotherbrands Ltd.	Dresses (U.K.)	
	Shearer Candles	Candles, diffusers (U.K.)	
	Wild & Wolf	Gardening accessories, mugs (U.K.)	
World of Eric Carle (The)	Iwaya Corp.	Baby products (Japan)	Joester Loria Group
	TCP Co. Ltd.	Novelty toys (Japan)	
Yes	Angotti Designs (Rowdy Sprout)	Accessories (children's, infants'), apparel (children's, infants'), bibs, blankets, burp cloths, diaper covers, dresses, hats, onesies, pajamas, rompers (U.S., Canada, France, Ireland, Japan, Mexico, Spain)	Epic Rights
	Shinsung Tongsang	Sweatshirts, t-shirts (South Korea)	
Yo-Kai Watch	NHN PlayArt	Mobile game apps (U.S., Canada, Australia)	LEVEL-5 Abby
Yu-Gi-Oh!	New Zealand Mint Ltd.	Collectible coins (New Zealand)	4K Media

*Extension or renewal.



contacts & connections

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

20th Century Fox Consumer Products, Jeffrey Godsick, President, 310-369-0751, jeffrey.godsick@fox.com, P. 8,10,11.

20th Century Fox Consumer Products, Stacey Kerr, VP Domestic Licensing, 310-369-5834, stacey.kerr@fox.com, P. 8,10,11.

4K Media, Jennifer Coleman, VP Licensing & Marketing, 212-590-2120, jcoleman@4kmedia.com, P. 13.

Action Lab Entertainment, Bryan Seaton, CEO & Publisher, info@actionlabcomics.com, P. 12.

Advanced Micro Devices (AMD), Lisa Su, President & CEO, 512-602-1000, lisa.su@amd.com, P. 11.

Alchemy 3, Jeffrey Schweig, President & CMO, 770-442-6993, js@alchemy3.com, P. 9.

Aliz Intl., Rosanne Tran, VP, 407-438-8816, info@alizhandbags.com, P. 9.

American Girl, Kate Carlyle, Marketing Partnerships & Licensing Manager, 608-830-4314, kate.carlyle@americangirl.com, P. 11.

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SPORTS

4.8% Growth in Retail Sales of Sports-Licensed Goods in 2015: Stellar Years for MLB, NBA, NASCAR and MLS

No Olympics? No problem. Sports licensing still thrived in 2015 at just below \$14.8 billion in U.S./Canada sales, according to *TLL's Annual Licensing Business Survey*. For the second year in a row, sports outperformed every other sector with the exception of entertainment. Its 4.8% increase was double U.S. GDP growth (2.6%) and easily exceeded the 3.6% overall industry-wide growth rate. Sports now accounts for 14.3% of all licensed retail sales in the U.S./Canada, trailing only corporate trademarks (26.8%) and fashion (20.3%) in market share.

The strong year would have been even better but for the fourth quarter retail slump that affected all sectors. And to some extent, the relative weakness of 2015 holiday sports sales had more to do with supply than demand. "Retailers became skittish about taking on inventory and wanted to clear shelves in December," explains one leading sports licensee. "As a result, they left significant sales on the table, especially for NFL merchandise."

Property Type: Performance By League

All leagues were up in 2015 but rates of growth diverged from the patterns of previous years.

NFL: NFL sales were up a flattish 3.4% in 2015, as compared to 5.2% the year before. "It was a good year but not a dramatic one with nothing standing out," according to one of the league's biggest licensees. Part of the problem was timing. For a league that does its most business in the fall and early winter, the fourth quarter retail slump came at the worst possible moment. Unusually strong NBA holiday sales also came at least partially at the NFL's expense. The silver lining was the NFLPA (the players' union) which not only maintained but surpassed last year's double-digit growth. Even so, sales of products based on licensed player properties account for only about one-third of total NFL sales.

MLB: In 2014, MLB surrendered the top spot for licensed sales to the NFL. In 2015, MLB went back to number one after having its best year in nearly a decade with \$3.5 billion in sales, \$113 million more than the NFL. Baseball's impressive 6.9% growth, led by apparel sales, was evidence of a new energy and buzz surrounding the sport fueled by:

- ▶ New stars headlined by the Chicago Cubs' Kris Bryant who became the first rookie to top MLB in player jersey sales;
- ▶ The return of popular teams like the Cubs, New York Mets, Toronto Blue Jays and Houston Astros to the post-season after years of dormancy. In addition, last year's darling, the Kansas City Royals, remained a licensing force, especially after completing their mission and winning the World Series; and

- ▶ New Commissioner Rob Manfred's reorganization of MLB's inefficient licensing structure, including the consolidation of traditional and digital licensing operations into a single office, which proved a boon to the consumer products division.

NBA: With \$2.5 billion, the NBA grew an astonishing 9.1% in 2015, and now accounts for 17.1% of the U.S./Canada market. As impressive as these numbers are, they don't include the other 35% of the licensing revenues the NBA earns in China, Europe and other global markets. No other U.S. sports league has even come close to the NBA's international success.

As usual, stars drove NBA sales. But this year, it wasn't just about LeBron, Kobe and the other usual suspects. 2015 saw the emergence of a new star that outshone them all: Stephen Curry, a deadly shooter with an MVP game and off-court personality to match. Curry topped all players in jersey sales. And the licensed sales generated by the NBA Finals' matchup pitting Curry's Golden State Warriors against LeBron James's Cleveland Cavaliers more than tripled the previous Finals record set by the Boston Celtics-L.A. Laker matchup of 2010. But while Curry is the key ingredient, his teammates have also contributed to making Golden State the best-selling NBA team—accounting for 28% of all team sales—since Michael Jordan's Chicago Bulls of the 1990s.

NHL: For sheer spectacle, NHL hockey is second to none. But it's also a niche sport with the smallest fan base of the big 4 leagues and a market share of only 6.9%. After growing 6.6% in 2014 and 6.9% in 2013, NHL sales were up a disappointing 3.1% in 2015.

In September 2015, the NHL made a series of major licensing moves. In addition to replacing long-time on-ice and replica jersey licensee Reebok with Adidas (starting in the 2017-18 season), the league signed new partnership deals with Fanatics and youth apparel maker Outerstuff that include equity stakes in both companies. The deals augur a new approach to licensing. Giving Adidas exclusivity enables the NHL to pare down its bloated licensee roster. Outerstuff is a longstanding licensee but the new deal changes the arrangement. Before, Reebok sublicensed NHL youth apparel to Outerstuff. Now the NHL will work directly with Outerstuff and be more involved in manufacturing and distribution. Adidas and Outerstuff products will be sold online via Fanatics' portals.

MLS: MLS accounts for just 4.4% of the market. But that belies the fact that it's the only pro sports league to post double-digit growth every year since 2004. In 2015, MLS sales rose 16%, surpassing the robust 14.6% growth of 2014. Although jerseys were the main driver, EA's *FIFA 2015* game

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was a huge seller. The league is also working to cultivate hard goods lines via new licenses with Bleacher Creatures, Oyo Sports, CR Gibson and Victory Tailgate. In all, MLS added 15 new licensees during the year, including '47 Brand, Antigua Group, Homage, Concepts Sports and Society 43 for apparel and accessories. Expansion is also fueling growth of licensed MLS sales. Expansion franchises in Orlando and New York City, the latter of which plays its home games in Yankee Stadium, joined the league last year. Four others are on the way in Atlanta, L.A., Minnesota and Miami.

NASCAR: After being the only league whose sales declined in 2014 (7.3%), NASCAR grew the most of any league other than MLS in 2015 (10.1%). The turnaround began in January when NASCAR hired Fanatics to overhaul its model for selling licensed merchandise trackside on Sprint Cup race days. Fanatics discarded the old “walk-up” approach in which individual teams sold their own merchandise out of trailers, for a “walk-in” set-up in which merchandise is sold in one central specially constructed 60,000 square foot tent assembled in a courtyard-style mall layout at each track. In addition to making it easier to shop, the new model was designed to enhance the fan’s race-day experience.

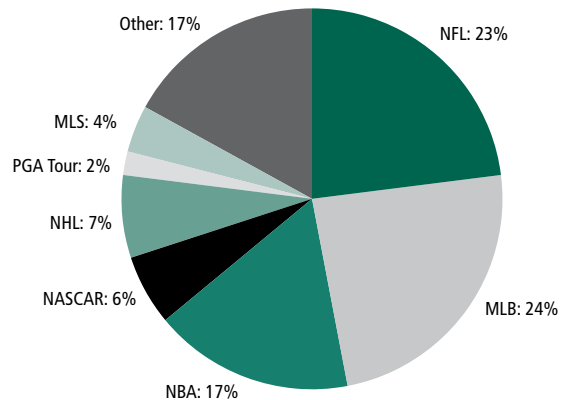
The so called “Fanatics Trackside Superstore” debuted in July and the results were spectacular and immediate. By year’s end, trackside sales were up 22%. Although all product lines thrived under the new model, hard lines (up 65%), youth apparel (up 40%) and hats (up 34%) benefitted the most.

PGA TOUR: The 2.8% increase of 2015 is consistent with the PGA TOUR’s perennial pattern of steady but modest growth. With \$344 million in sales, the PGA TOUR accounts for just 2.3% of the market. As in the past, sales were driven by apparel bearing the TOUR’s celebrated silhouetted golfer in a box logo. Sales of licensed products based on the names and likenesses of individual players like Jordan Spieth and Phil Mickelson do not count as PGA TOUR revenues.

RETAIL SALES OF LICENSED SPORTS GOODS, BY LEAGUE, U.S./CANADA, 2014–2015 (FIGURES IN MILLIONS)				
PROPERTY TYPE	RETAIL SALES, 2015	RETAIL SALES, 2014	CHANGE, 2014–2015	SHARE OF SPORTS LICENSING, 2015
National Football League	\$3,403	\$3,291	3.0%	23.0%
Major League Baseball	\$3,516	\$3,289	7.0%	24.0%
National Basketball Association	\$2,536	\$2,324	9.0%	17.0%
NASCAR (teams & drivers)	\$837	\$761	10.0%	6.0%
National Hockey League	\$1,026	\$995	3.0%	7.0%
PGA Tour	\$344	\$334	3.0%	2.0%
Major League Soccer	\$647	\$558	16.0%	4.0%
Other	\$2,478	\$2,558	-3.0%	17.0%
TOTAL	\$14,786	\$14,109	5.0%	100.0%

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

SHARE OF RETAIL SALES OF SPORTS-LICENSED MERCHANDISE, BY LEAGUE, U.S./CANADA, 2015



SOURCE: THE LICENSING LETTER

Product Categories: Apparel, Accessories Drive Growth

All three legs of the sports licensing product category “tripod” had solid years in 2015.

Soft Lines

Apparel, accessories and other soft lines accounted for roughly 50% of sales. As usual, jerseys were the workhorse of the soft lines. But while sales of traditional authentic and replica jerseys chugged along at a steady rate, it was the debut of a new genre of jersey that stood out. MLB’s new Cool Base jersey, which uses lighter materials and venting to enhance comfort, “absolutely killed it,” according to one licensee. Look for the other leagues to adapt Cool Base technology in the very near future.

Although apparel accounts for roughly 80% of sales, accessories continue to be the fastest growing segment of the soft lines. 2015 was another fabulous year for head-wear across all leagues. “Caps have become not just fan wear but fashion pieces,” explains an NBA source, “and licensees have gotten really good at introducing new styles, fits and silhouettes to keep it fresh.” For example, sales of both fitted caps and loosely fitting “dad caps” were strong throughout the year.

Socks, while still a relatively small part of the accessories market, continued growing at a triple-digit pace in 2015. The sports licensed socks craze began about four years ago. And while a number of licensees are partaking, one company seems to be emerging as the Nike of the segment. In April 2015, Stance replaced For Bare Feet as the official on-court socks supplier of the NBA. The long-term deal allows Stance to display its logo on player socks. Stance also has licenses to produce NBA legend and MLB team socks lines.

Hard Lines

Growth in hard lines like trading cards, collectibles, sporting goods, home furnishings and paper goods was far

less dramatic. To some extent, 2015 was a transition year for hard lines, especially in the NFL where Panini prepared to take over from Topps as official and exclusive trading card provider for the league (and the NFLPA). The saving grace for NFL hard lines was “homegating,” i.e., the social trend of tailgating and watching football at home, which fueled sales of team-branded home furnishings, paper goods, gifts and novelties.

Other leagues reported better results, particularly NASCAR which saw trackside hard line sales surge 65%. Although everything was selling, sales of 1:64 die-cast metal (Matchbox-style) cars increased 90%, according to NASCAR source. Meanwhile, the NBA reported strong sales in league-branded balls, backboards, rims and other sporting goods. Another hard lines bright spot was headphones, e.g., Beats by Dre’s rollout of six MLB team-branded headphones in the first year of its new partnership with the league. Even so, hard lines remain the smallest leg of the sports licensing triad accounting for less than 10% of sales.

Digital & Multimedia

Mobile is coming on fast but console video games remain the mainstay of the multimedia product line, especially games from EA Sports. Three of the year’s top 10 best-selling games were EA licensed sports games (for PS4, Xbox One, 360 and PS3):

- ▶ *Madden NFL 16*, which bowed in August and was the second top selling game of 2015;
- ▶ *NBA 2K16*, which sold 4 million units in its first week and became the league’s single biggest grossing licensed product across all categories for the year; and
- ▶ *FIFA 16*, which generates royalties for MLS—the league doesn’t yet have its own dedicated game.

2015 also saw MLB recover from the 2013 loss of 2K, its biggest video game licensee. In addition to retaining its deal with Sony for *MLB: The Show*, MLB Advanced Media (MLBAM) became the first pro sports league to build and distribute its own console video game. *RBI Baseball*, which started as a game for Xbox and PS4, is now available on smartphones and tablets. MLBAM also developed a suite of mobile-only games targeting young and casual fans, the most recent of which MLB.com Line Drive debuted in 2015. Other MLBAM games for mobile devices include *Home Run Derby* (arcade), *Ballpark Empire* (city builder/social) and *Franchise MVP* (strategy).

Of course, all of the leagues have been focusing on mobile games for almost a decade. But MLB is the only league that does it in-house. The other leagues rely on their current console licensees (in most cases, EA) to develop mobile versions of their games. Notable examples:

- ▶ *Madden NFL 16* for mobile from EA, essentially a free to play mobile version of the *Madden Ultimate Team* console game in which gamers pick teams of current and past NFL players and compete in different forums—e.g., full 16-game seasons, Live Events

and head to head—to earn coins and other in-game rewards that can be redeemed for player packs and other enhancements.

- ▶ *Real Racing 3* from EA, a free download with enhancements available via in-app purchase featuring real NASCAR drivers, cars and tracks that gamers use for role-playing to break into NASCAR and compete for the Sprint Cup championship, has attracted a huge global following since its 2013 release.
- ▶ *NBA Live 15 Mobile* from EA for iOS and Android, in which gamers build teams of real NBA players and coach them in practices and 5-on-5 competitions. The game relaunched in 2014 after a 4-year hiatus in response to negative reviews. The 2015 game, the second of the revised series, featured improved graphics but flawed gameplay, a weakness the 2016 version (which launched in February) is designed to address.
- ▶ *NHL 2K* from 2K Sports, costing \$7.99 for iOS and Android download featuring real NHL players, relaunched in 2014 after a 4-year hiatus. The game has been sharply criticized as a stiff mobile version of 2K’s earlier console game with subpar graphics, functionality and gameplay.

RETAIL SALES OF SPORTS-LICENSED MERCHANDISE, 2014–2015, BY PRODUCT CATEGORY (FIGURES IN MILLIONS)

PRODUCT CATEGORY	RETAIL SALES, 2015	RETAIL SALES, 2014	CHANGE, 2014–2015	SHARE OF MARKET, 2015
Accessories	\$1,189	\$1,099	8.2%	8.0%
Apparel	\$6,180	\$5,782	6.9%	41.8%
Consumer Electronics	\$349	\$339	2.9%	2.4%
Domestics	\$216	\$207	4.3%	1.5%
Food/Beverages	\$414	\$395	4.8%	2.8%
Footwear	\$689	\$664	3.8%	4.7%
Furniture/Home Furnishings	\$232	\$223	4.1%	1.6%
Gifts/Novelties	\$849	\$884	-3.9%	5.7%
HBA	\$216	\$217	-0.1%	1.5%
Housewares	\$192	\$193	-0.7%	1.3%
Infant Products	\$292	\$290	0.7%	2.0%
Publishing	\$234	\$232	0.8%	1.6%
Sporting Goods	\$559	\$554	0.9%	3.8%
Stationery/Paper	\$88	\$87	1.7%	0.6%
Toys/Games	\$672	\$656	2.5%	4.5%
Video games/Software	\$1,649	\$1,593	3.5%	11.2%
Other	\$766	\$695	10.2%	5.2%
TOTAL	\$14,786	\$14,109	4.8%	100.0%

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

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Sports Licensing Trends & Growth Areas

While the extent of growth over the past two years (5% in 2014, 4.8% in 2015) may be a bit of an anomaly, the outlook of sports licensing is incredibly positive. The growing popularity of pro sports shows no signs of weakening any time soon. And the growth and diversification of the fan base is creating dramatic new opportunities for licensors and licensees alike.

The Female Factor

For decades, sports licensing has been primarily about selling jerseys and off-field apparel for male fans. While that business remains strong and steady, women represent the real growth area. According to ESPN and other sources, women constitute 40% of the fan base for the major U.S. sports leagues. Sales of women's products still constitute less than 25% of the total business. But that's an exponential jump from just five years ago. Meanwhile, faster growth rates on the women's side, especially for apparel, have become the norm (although the disparity in growth by gender varies by league).

Although it took a while, all of the leagues now recognize the opportunity and have stepped up efforts to engage female fans. Once a side show, female fan wear has become a large, well-oiled operation featuring public relations and charitable campaigns, fashion shows and, of course, plenty of product. For most leagues, the starting point in product development was enlisting Alyssa Milano, the visionary of fashionable sports branded apparel designed for the female form and lifestyle. But while G-III's Touch by Alyssa Milano remains at the top of every league's licensee roster, there are now a variety of companies dedicated to cranking out sports-branded fashion wear for female fans—Miss Fanatic, Junk Food Clothing and Meesh & Mia, to name just a few.

The leagues are also asking longstanding apparel licensees to supply more women's products, both on- and off-field. For example, "as part of new agreements, each MLB licensee is expected to create a more extensive lineup of female apparel," according to a league source. One league stalwart, New Era, even brought on supermodel Nina Agdal as spokesperson for its MLB women's line. The NFL and MLB have been at the front of the newest phase in the evolution: engaging well-known women's fashion designers from outside the sports world to design high-end, stylish products branded with league and team colors and logos. Examples:

HIGH PROFILE WOMEN'S FASHION DESIGNER PRO SPORTS LICENSEES

DESIGNER/ LICENSEE	LICENSOR(S)	PRODUCTS
Victoria Secret PINK	NFL, MLB	Apparel, accessories
Alex and Ani	NFL, MLB, PGA	Accessories (bracelets, other jewelry)
Dooney & Bourke	MLB	Accessories (hand bags, pocketbooks)
Alex Woo	MLB	Accessories (jewelry)
Pandora	NFL	Accessories (jewelry)
CoverGirl	NFL, MLB	HBA (nail polish, cosmetics)

SOURCE: THE LICENSING LETTER

Other New Markets & Models

Sports licensors and licensees are targeting a number of other historically underserved markets. Thus, for example, all of the leagues have or are in the process of expanding their ladies' apparel lines to include maternity and plus sizes.

Although children's apparel is hardly a new product line, it's becoming more of a priority. It's also undergoing a total redefinition. For the first time, the leagues and their partners are paying serious attention to the young girls' market, which one licensor compares to the women's space a decade ago. And as with women, the products being offered for both girls and boys are being driven by a more sophisticated appreciation for quality and fashion. "The kids' market has been novelty onesies," notes G-III's Alyssa Milano. "Kids' product should be high quality and on-trend."

One of the things leagues are doing to get more "on-trend" is making more extensive use of new licensing models like cross-licensing arrangements that enable them to generate products combining their own intellectual property with that of other iconic brands, typically characters from children's entertainment. "For girls 4-10, whether it's Disney Princess or Hello Kitty or sports, what makes it work is graphics on cute clothes," says Milano. MLB has been especially active in cross-licensing including a 2015 Star Wars deal patterned after similar successful arrangements involving Peanuts and Hello Kitty.

Events & Hot Markets

Leagues and licensees are getting better at not only recognizing but creating new opportunities to sell branded merchandise via use of "hot markets." Every league has its own slate of hot market events—the Super Bowl, World Series, NBA Finals, All-Star games, etc. But while all leagues use the model, some do it better than others.

In 2015, nobody did hot markets better than the NBA. Part of it was luck. Thus, the record sales generated by the 2015 NBA Finals discussed earlier wouldn't have come to pass had not the league's two biggest stars—Lebron James and Stephen Curry—actually made the Finals. On the other hand, the 87% increase in NBA Christmas Day merchandise sales was the product of skill, not luck. The special parchment color and traditional script jerseys worn by the teams playing on Christmas Day made the cash registers ring Jingle Bells. "The NBA usually sells most in the spring while the playoffs are going on; sales get fairly dormant at year's end when the NFL takes over," relates one licensee. "But this year, the NBA had an amazing Christmas program and its fourth quarter sales were unusually strong."

MLB also got a huge lift from hot markets in 2015. The teams that made it all the way to League Championship Series—Cubs, Mets, Blue Jays and Royals—were among MLB's most popular (although the fact that they all wear royal blue created unforeseen production challenges for apparel makers). All-Star Game sales were also up 32% at MLB.com Shop and 16% at the ballpark thanks, in part to the specially designed 1800s-vintage pill-box style caps from New Era.

In addition to scheduled events, hot markets can include accomplishments on the field. The window for exploiting these hot markets is extremely narrow when the accomplishment is unforeseen. After all, euphoria over a pitcher's perfect game has a limited shelf life. But when people know the accomplishment is coming, e.g., Cal Ripken's streak, there is plenty of time for the emotion—and inventory—to build up. Unfortunately, such hot markets are also pretty rare. In 2014, MLB and the New York Yankees got one in the form of Derek Jeter's retirement tour. In 2015, it was NASCAR's turn when legendary driver Jeff Gordon announced that he planned to retire at season's end. The resulting Jeff Gordon retirement product line proved a windfall for NASCAR sales.

Retail Sales By Distribution Channel

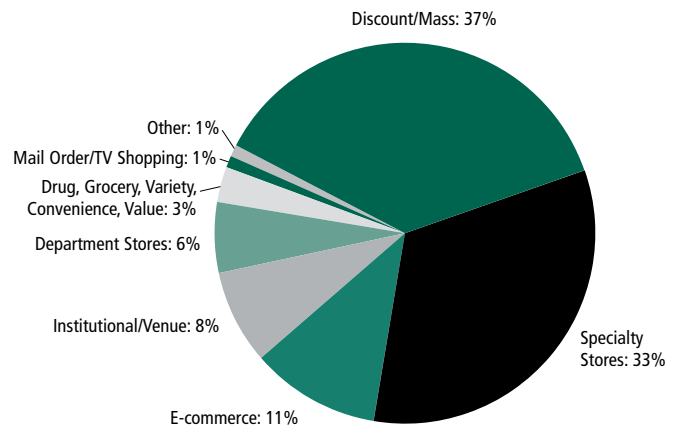
Although e-commerce is on the rise, nearly 90% of retail sales of licensed sports merchandise come from brick and mortar. Mirroring industry-wide patterns, mass/discount is the largest channel, accounting for 37% of all sales, followed by specialty at 33%. The 37/33 split between these two channels hasn't changed since 2012.

Historically, specialty stores, including big box sporting goods retailers like Dick's, Modell's and newly bankrupt Sports Authority, have been the mainstay of the industry providing a steady and reliable outlet for jerseys, caps and other licensed merchandise. But most of the space in these stores is dedicated to non-licensed apparel, sporting goods, running shoes and other products. At the same time, many sporting goods stores have opened league pop-up stores, i.e., shop-in-shops selling league-branded products, within their locations. Of course, in-shop league stores have also popped up at mass retail and department stores, e.g., NASCAR "Race Time" weekend displays at Walmarts located in cities where races are held and NBA pop-up shops at Bloomingdales for the February 2015 All-Star Game held in New York City.

The decline of the department store is apparent in the sports sector. After falling from 8% to 7% in 2014, department store sales slipped another 1% to 6% in 2015. Meanwhile, the institutional/venue channel, which includes stadium sales and merchandise sold at events, increased from 7% to 8%. *Result:* Institutional/venue passed department stores for third largest brick and mortar channel. Expect the gap to widen now that almost all pro sports teams have their own stadium and online stores and an incentive to maximize them, i.e., the fact that revenues from these sales aren't shared with the other teams.

As in all other segments, the e-commerce channel has been gradually gaining ground in sports. But after edging up 1% in 2014, e-commerce held steady at 11% in 2015.

RETAIL SALES OF LICENSED SPORTS MERCHANDISE, BY DISTRIBUTION CHANNEL, U.S./CANADA, 2015



SOURCE: THE LICENSING LETTER

The Licensing Sourcebook Online

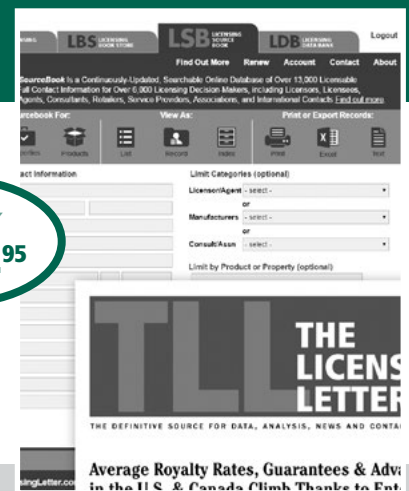
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VIDEO GAMES

Video Game-based Merchandise Back on Track

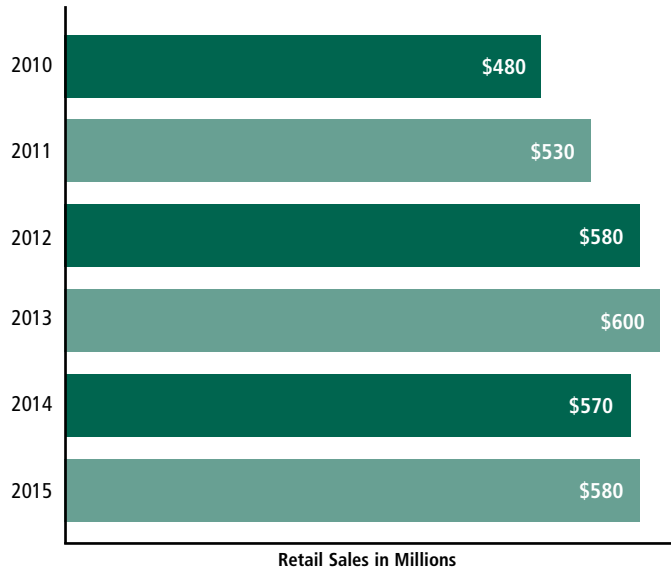
This year video game/interactive/online-based merchandise turned around from a 4% loss in retail sales of licensed merchandise in 2014 to a 2% gain for 2015 according to *TLL's Annual Business Survey*. The category has begun to recover from the sharp decline caused by Angry Birds, which made up the bulk of sales in the sector. Growth came from the resurgence of classic properties like Sonic the Hedgehog, Tetris and Capcom, the continued activity of franchises like Halo and Call of Duty (which have the largest esports tournaments) and newcomers like Minecraft.

The video game industry is much like the movie business, which relies heavily on sequels and established franchises to fill its coffers. Of the Top 10 video game titles for 2015 ranked by The NPD Group, eight are franchises and the remaining two are established IPs (Microsoft's Minecraft and EA's Star Wars). The list resembles more of an old boys' club than it had in 2014, where two original games made their way onto the list (Ubisoft's *Watch Dogs* and Activision's *Destiny*).

TOP 10 BEST-SELLING GAMES, 2015		
RANK	GAME	SYSTEM
1	Call of Duty: Black Ops III	Xbox One, PS4, 360, PS3, PC
2	Madden NFL 16	PS4, Xbox One, 360, PS3
3	Fallout 4	PS4, Xbox One, PC
4	Star Wars: Battlefront	Xbox One, PS4, PC
5	Grand Theft Auto V	PS4, Xbox One, 360, PS3, PC
6	NBA 2K16	PS4, Xbox One, 360, PS3
7	Minecraft	360, Xbox One, PS3, PS4
8	FIFA 16	PS4, Xbox One, 360, PS3
9	Mortal Kombat X	PS4, Xbox One
10	Call of Duty: Advanced Warfare	Xbox One, PS4, 360, PS3, PC

SOURCE: RANKING BY THE NPD GROUP; THE LICENSING LETTER

RETAIL SALES OF LICENSED MERCHANDISE, BASED ON VIDEO GAMES/INTERACTIVE/ONLINE, U.S./ CANADA, 2010-2015



SOURCE: THE LICENSING LETTER

The most significant reason for the large drop in retail sales in previous years was the slump caused by the mobile game app Angry Birds—which is expected to enjoy a spike in retail sales in 2016 thanks to the new animated film, set to hit theaters May 20, 2016.

Also expected to boost sales in 2016 is the breakout video game brand for 2016, Five Nights at Freddy's, a 2014 indie point-and-click survival horror video game represented by Striker Entertainment in the U.S. and Canada. The fourth installment was released July 23, 2015.

See below for selected upcoming games with licensing potential:

Planned Video Game Releases With Licensing Potential, 2016-2017

GAME	PLANNED RELEASE	PUBLISHER	SUMMARY	SEQUEL	REBOOT	NEW IP	LICENSED	GRAPHICAL UPDATE
Final Fantasy VII: Remake	12.30.2016	Square Enix	Long anticipated HD remake of the 1997 game.		X			X
Ratchet & Clank	4.29.2016	Sony	Reimagining of the character-driven action game series, with a film on the way in 2015. IP Factory is current licensee for statues.		X			
Quantum Break	4.5.2016	Microsoft	Time travel action game formatted in the style of a TV series.			X		
Doom	5.13.2016	Bethesda Softworks	Id Software's reboot of the horror-themed shooter series.		X			
Deus Ex Mankind Divided	8.23.2016	Square Enix	Cyberpunk themed sequel to 2011's Deus Ex: Human Revolution	X				
Crackdown 3	Q3 2016	Microsoft	Reimagining of 2007's open-world superhero crime game, created by Lemmings/Grand Theft Auto creator David Jones.		X			
ReCore	Q3 2016	Microsoft	A new game from the creators of Metroid Prime and Mega Man features a woman and her robot dog fighting enemies in a desert wasteland.			X		

Planned Video Game Releases With Licensing Potential, 2016–2017, Cont'd.

GAME	PLANNED RELEASE	PUBLISHER	SUMMARY	SEQUEL	REBOOT	NEW IP	LICENSED	GRAPHICAL UPDATE
Gears of War 4	Q4 2016	Microsoft	Next chapter in the best-selling sci-fi series.	X				
Dead Island 2	TBA 2016	Deep Silver	San Francisco-set zombie game sequel from the creators of Spec Ops: The Line.	X				
Dishonored 2	TBA 2016	Bethesda Softworks	Sequel to 2012's Dishonored.	X				
Dreams	TBA 2016	Sony	From the developer of LittleBigPlanet, this game lets players "piece together a whole environment in moments" to explore one another's dreams.			X		
Homefront: The Revolution	TBA 2016	Deep Silver	Sequel to THQ's 2001 game, Homefront, set in a U.S. invaded by the Greater Korean Republic.	X	X			
Horizon: Zero Dawn	TBA 2016	Sony	Action role-playing game set after the fall of civilization, from the creators of the Killzone franchise.			X		
Sea of Thieves	TBA 2016	Microsoft	Developer Rare (Banjo Kazooie, Battletoads) is creating this pirate adventure game.			X		
South Park: The Fractured but Whole	TBA 2016	Ubisoft	A superhero themed origin story of "The New Kid."	X			X	
The Last Guardian	TBA 2016	Sony	A young boy travels with a mysterious creature through a beautiful and treacherous fantasy world in this much-anticipated title originally announced in 2007.			X		
The Legend of Zelda	TBA 2016	Nintendo	Upcoming installment in longstanding action/role playing franchise starring Link. Series licensees include Fifth Sun (apparel) and Dark Horse Comics (statues).		X			
World of Final Fantasy	TBA 2016	Square Enix	Brand new game with cutesy versions of classic Final Fantasy characters.	X	X			
Mass Effect: Andromeda	Q1 2017	Electronic Arts	Newest entry into BioWare's science fiction action/role playing game series. Past licensees include Dark Horse Comics (collectibles, comics), IP Factory (collectibles) and Black Milk Clothing (women's apparel).	X				
Shenmue III	Q4 2017	TBD	Director Yu Suzuki during Sony's E3 press conference announced a Kickstarter campaign to raise \$2 million to start development of this sequel, 14 years after Shenmue II.	X				
For Honor	TBA	Ubisoft	Next big new IP from Ubisoft is a combat game featuring brutal battles between three factions.			X		
Phantom Dust	TBA	Microsoft	Action/strategy game and remake of the 2004 title of the same name for the Xbox One.		X			
Tom Clancy's Ghost Recon: Wildlands	TBA	Ubisoft	Globetrotting installment in the Ghost Recon shooter series.	X			X	

MOVIE MERCH

Turtles Toys Twice as Big as 2014

Licensed Teenage Mutant Ninja Turtles figures from Playmates were the top toy of 2014, according to The NPDI Group, when the last franchise feature film was in theaters. In an effort to build on that success, the toy lines for this year's *TMNT: Out of the Shadows* are expected to be twice as big, sources tell *TLL*.

Nickelodeon announced lines from Playmates Toys (action figures, deluxe talking figures, vehicles, role play, playsets and more) and Mega Bloks (buildable action figures, buildable vehicles, construction playsets) that are inspired by the release from Paramount Pictures.

2016 is poised to be the Turtles' biggest year, said Nickelodeon Chief Marketing Officer and President of Consumer Products Pam Kaufman. "We saw tremendous traction with the consumer products we introduced for the first Teenage Mutant Ninja Turtles movie so we wanted to team up our best-in-class partners to deliver fresh new toys that bring memorable movie moments to life," she said in a statement.

Turtles became a \$1 billion-plus global property in 2014, when its sales grew 20% domestically and 26% outside the U.S. and Canada, according to *TLL's* annual ranking of entertainment/character properties with more than \$100 million in domestic sales. Turtles ranked fifth on the list.

The Turtles toy announce came as Warner Bros.' *Batman v Superman: Dawn of Justice* burst into theaters over

the weekend, creating a feeling that the summer movie season had already begun at spring break.

Of course, the real summer season is at least six weeks away, when Disney's Avengers franchise installment *Captain America: Civil War*, which is already blanketing prime-time TV with ads, will kick it off. It's followed in the summer parade by *X-Men: Apocalypse* on May 27th and the Turtles sequel on June 3rd.

Elsewhere in Hollywood

Here's a story of a series of books that inspired a series of movies, and another book, which inspired a movie, which is inspiring even more books.

Warner Bros. Consumer Products has signed Scholastic, HarperCollins and Insight Editions as its global publishing partners in support of the Nov. 18 movie release *Fantastic Beasts and Where to Find Them*. Harry Potter spin-off *Fantastic Beasts* (both book and screenplay by J.K. Rowling), is a Hogwarts textbook written by the character Newt Scamander.

Scholastic, which has a multi-year global publishing deal for the Harry Potter franchise, including *Fantastic Beasts*, will publish children's movie tie-in books. HarperCollins will publish adult tie-ins, including coloring books and postcards. Insight Editions will bring to market novelty and deluxe paper engineered books.

Who's News

James Pitaro is now Chairman of Disney Consumer Products & Interactive Media as **Leslie Ferraro** steps down.

Kirsten Fallon has been appointed as Director on the LMCA's NY HQ staff.

VIMN promotes **Claire O'Connor** to VP Consumer Products in Asia, Australia and New Zealand.

Endemol Shine North America forms a new brand and licensing partnership division, led by **Tamaya Petteway** as SVP and **Kelly C. Hill** as VP Licensing Partnerships.

Xilam grows with **Marie-Laure Marchand**, appointed Head Global Consumer Products.

Stéphane Courbit is Chairman and **Marco Bassetti** CEO of Banijay Group.

Ricardo Yoselevitz is promoted to VP Strategy & Business Development at Seltzer Licensing.

Nitro Circus taps **Cassie Dombrowki** to serve as Director Global Licensing.

Banijay and Zodiak Media unite their complementary catalogues and production units. **Stéphane Courbit** is named Chairman and **Marco Bassetti** is appointed CEO of the new Banijay Group.

9 Story Media Group appoints Brown Bag CEO **Cathal Gaffney** as the new COO, and Blake Tohana as CFO.

PMS International Group appoints **Ruth Leonard** as the firm's new Head Brand & Licensing.

Copyrights Group welcomes back **Demi Patel** as Director Creative Services, while **Lisa Carroll** takes on the role of Head Product Development.

Gold's Gym hires **Konstantinos "Dean" Pappous** as its new COO.

Alex Brands appoints **Chris Schaden** EVP Sales.

Nike hires **Dave Dombrow** to begin design work at Nike in 2017.

Revlon hires **Fabian Garcia** as CEO, to start April 15.

WWE names **Pamela J. Murrin** as SVP Data Strategy.

Gaumont hires **Nicolas Atlan** as President Animation, while **Terry Kalagian** is now VP Creative for animation.

Genius Brands names **Debra Pierson** as GM of its VOD channel.

Deirdre Brennan lands at Corus Kids as VP Content.

Saucony appoints **Thomas Hartge** SVP Global Footwear to succeed Patrick O'Malley, who was recently named President of the brand.

Rainmaker Entertainment welcomes **Gregory R. Little** to the newly created position of SVP Content.

Sam Wick joins agency UTA in its digital media department to build new business opportunities.

GBI names **Debra Pierson** as GM of its Kid Genius channel.

Amy Friedman leads all content strategies as SVP Programming & Development for the NBCUniversal-owned preschool net Sprout.

Tommy Bahama appoints **Dawn Brandl** SVP Men's Design & Product Development.

Ron Hougardy joins Dependable Solutions as its new Director Consulting Services, while **Jackie Ferguson** is named Commercial Director.

Discovery Communications' CFO **Andrew Warren** will depart the company at the end of 2016. An internal and external search for his successor will begin immediately.

Overstock.com's Founder & CEO, **Patrick Byrne**, steps down from his position to take a personal leave of absence for medical reasons.

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