

# TLL THE LICENSING LETTER

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## Global Sales of Licensed Goods Reach \$163.1 Billion in 2015; Highest Growth in Nearly a Decade

Statistically, 2015 was a banner year for licensing with worldwide retail sales topping \$163.1 billion, 2.7% better than the previous year's \$158.8 billion, according to *The Licensing Letter's Annual Licensing Business Survey*. But the numbers are a bit deceiving. Growth was uneven; and a sluggish fourth quarter reinforced concerns about its long-term sustainability.

In 2015, the rich got richer. Four of the world's seven richest markets for licensed goods accounted for most of the prosperity by posting growth above the global 2.4% GDP rate, including the U.S. at 3.9%, the U.K. at 3.2%, China at 6.0%, and Germany at 3.6%. Elsewhere around the world, sales were largely flat or down in 2015. The growth that did occur was also concentrated in a couple of sectors, especially entertainment/character which increased a staggering 6.3% rate worldwide. But the good times in entertainment were attributable to the continued dominance of star properties, most of which came from the Disney stable. Meanwhile, only one other property type exceeded the industry-wide 2.7% growth rate: fashion at 3.5%.

### U.S./Canada

Licensed sales in the U.S./Canada grew in 2015 for the fifth year in a row to \$103.3 billion, up 3.4% from \$99.8 billion in 2014. But while the aggregate figures are impressive, the success was confined to one side of the border.

Macro-economic conditions in the U.S. were ideal for retail and the consumption of licensed goods. Cheap gas and falling unemployment increased discretionary income; consumer confidence grew and low interest rates discouraged saving. While the sluggish fourth quarter took some air out of the balloon, the overall result for the year was a \$3.6 billion jump in sales from \$90.2 billion to \$93.8 billion. Mirroring global patterns, the 3.9% increase in

U.S. licensed sales was fueled by abnormally high growth in entertainment.

But up north things went south. The same low oil prices that put extra money in the pockets of U.S. consumers cost many Canadians their jobs, especially in the key energy producing regions of Alberta, Ontario and Quebec. After the previous year's lackluster 0.75% growth, licensed sales in Canada actually

*Continued on page 3*

### VIDEO GAMES

## Licensed Properties Play at E3

Seventy thousand-plus people, including 20,000 fans, flocked to the Electronic Entertainment Expo (E3) in Los Angeles last month for the digital entertainment industry's annual parade of video game properties, both new and well known.

The hot topic of the show was Virtual Reality (VR) with Sony announcing that its PlayStation VR headset for PS4 will become available Oct. 13, priced at \$500 and major game properties getting the VR treatment on platforms ranging from PlayStation VR to the more pricy HTC Vive (\$800) and Oculus Rift (\$600). Deloitte predicts that VR will be a \$1 billion market in 2016, with about \$700 million coming from hardware and the rest from content.

While VR holds enormous potential for consumers to interact with their favorite properties more intimately than ever before—and not just in games, but also in retail settings and more—the technology is still in its very early stages in terms of its consumer market. Nevertheless, top-shelf properties getting the VR gaming treatment through 2017 include *Batman Arkham VR*, *Star Wars: Battlefront X-wing VR Mission* (not a whole game) and *Final*

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# **Licensing Ledger**

**Sanrio** tapped **Dunkin' Donuts** to launch the first Hello Kitty branded donuts in Germany in a deal brokered by Team! Licensing at all 70 locations country-wide. The collaboration has further been extended to retailer Rewe. Additionally, Hello Kitty and Dunkin' Donuts will appear together at Museumsuferfest in Frankfurt, Germany, Aug. 26-28, with special activities, costume appearances and other activations to support the brand.

**Beanstalk** will now represent the personality rights of legendary icons. The service, formally called Icon Representation, will be led by Martin Cribbs, who has joined the agency as VP Brand Management.

**Orchard Street Ventures** is a new agency specializing in lifestyle licensing. OSV currently represents Lionsgate, Time Inc. (*Food & Wine* and *Southern Living* magazines), and Westinghouse in addition to start-ups like industrial design house Double Double and art consultancy Culture Corps.

**Michael Kors** acquires Michael Kors (HK) Ltd., the exclusive licensee of the company in China, for \$500 million.

Housewares company **Fox Run Brands** acquires Tops Manufacturing Company Inc.

**The Adidas Group** has sold its Mitchell & Ness business to a newly formed entity primarily owned by **Juggernaut Capital Partners**.

**Johnson & Johnson** will pay \$3.3 billion to take over **Vogue Intl.**, which owns hair-care brand OGX, on the heels of acquiring skin-care brand NeoStrata.

**Shiseido Americas** has acquired the Laura Mercier and ReVive brands for an estimated \$260 million.

The joint venture of Gordon Brothers Group, Hilco Merchant Resources and Tiger Capital Group has commenced going-out-of-business sales at all **Sports Authority** locations after the retailer filed for Chapter 11 bankruptcy. The sales will affect brands including Under Armour, Nike, North Face, Wilson, Adidas, ASICS and Brooks.

**C&F Enterprises** is adding to its home accessories business with the acquisition of **Transpac**.

**Pulse Evolution** will leverage its partnerships with Authentic Brands Group and three late celebrity estates—Michael Jackson, Elvis Presley and Marilyn Monroe—to expand entertainment licensing through the creation of realistic virtual humans. A new partnership with **XIX Entertainment** will allow the tech firm to produce immersive content for stage, virtual reality, augmented reality and artificial intelligence.

U.K. family resort **Blackpool** will host to a major celebration of the 50th Anniversary Year of the Star Trek franchise throughout 2016 and 2017 with a series of events. First up is *Star Trek: The Exhibition* on the famous Golden Mile beginning June 30 and open daily throughout the year.

The **Airheads** brand celebrates its 30th birthday in partnership with candy store **IT'Sugar** to launch a number of shop-in-shops. Some 90 stores across the U.S. will stock the sweets as well as an exclusive line of new apparel, squishy pillows and other accessories.

Dubai is home to the world's first official Harper's Bazaar cafe, now open in the Dubai Design District. Launched by **Marka PJSC** and **Hearst Magazines Intl.**, the location features a total dining capacity of 140 seats.

The Powerpuff Girls soared above Dubai in the form of a trio of flying inflatables all as part of the ongoing celebrations for the series' return to **Cartoon Network** this year.

## Cartoon Network U.K.

commissioned An Ooo Experience from London-based tech studio **Hellicar&Lewis**. The first-ever live interactive Adventure Time game offering will be playable at select U.K. malls this summer.

The adult entertainment brand **Hustler** this year will launch its first fragrance line, with **Wonder Beauty**. The two companies have planned an October launch, to include men's and women's fragrances and bath/body products with "a decadent blend of raw sexuality and a provocative, break-the-rules attitude." Of course.

The **British Museum** licensed **The Moorland Rug Company** to produce a range of British Museum rugs based on the works of Japanese artist Katsushika Hokusai. The rugs will be based on four Hokusai prints, including the iconic The Great Wave off Kanagawa.

**Mattel** is constructing an ambitious licensing program for its remodeled **Bob the Builder**. The program comes on the heels of the preschool show's relaunch last year on PBS Kids in the U.S. and in 16 additional markets. Licensees working together to get the job done include **Amscan** (party goods), **Rubies** (costumes), **Happy Threads** (apparel) and **Little Brown** (books) in the U.S. and **BCI** (sleepwear and apparel), **Santex** (apparel and accessories), **Jumbo** (puzzles and games), **Ravensburger** (puzzles and games) and **Egmont** (magazines) in the U.K. and Europe.

DC Superheroes to the rescue of licensed paper products? The stationery/paper licensed product category has been in decline for a number of years, according to the *TLL Annual Licensing Business Survey*, but **Warner Bros. Consumer Products** is undeterred. The company is expanding its existing relationship with **American Greetings** for stickers, party goods and gift wrap to include greeting cards featuring DC Super Hero Girls, Justice League, and Wonder Woman.



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## Global Sales of Licensed Goods

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declined 1.4% in 2015. Canadians became bargain hunters, spending most of whatever money they had for licensed goods at value chains like Walmart, warehouse clubs like Costco, and fixed-price retailers like Dollarama.

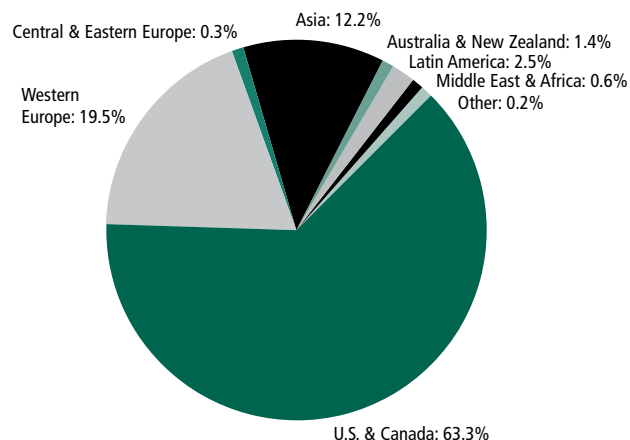
### Western Europe

Although growth was only 1.5% (\$31.7 billion in total sales), 2015 was Western Europe's strongest year since 2010. The "recovery," such as it was, began in 2014 when conditions reversed after three down years in a row by posting modest 0.1% (\$20 million) growth. But like last year, two powerhouse markets enjoyed most of the growth in 2015.

The U.K., the world's fourth biggest licensing market, grew 3.2% for the year (as compared to 3.0% in 2014). "It was the best retail environment in years with consumer confidence reaching a five-year high," explains one U.K. licensee. "Even though High Street is struggling, the big retailers are relatively healthy, knock on wood." The same segments that did well in the U.S. also thrived in the U.K., including "A"-list entertainment properties: imports like Star Wars, Frozen and Minions; and homegrown brands like Inspector Gadget, Twirlywoos, Moomins and the newly revived Teletubbies. The strong appeal of entertainment properties also propelled sales of traditional toys and games, especially action figures, plush and building sets.

No country in Western Europe had a better licensing year than Germany. After growing 2.8% in 2014, sales of licensed goods increased 3.6% to just under \$5.4 billion in 2015, making Germany the seventh biggest market in the world. Health and wellness-conscious consumers made

### RETAIL SALES OF LICENSED MERCHANDISE, WORLDWIDE, BY TERRITORY, 2015



SOURCE: THE LICENSING LETTER

German stores fertile grounds for licensed food and beverage products. Licensed clothing, home goods, furniture and personal care goods were among the product categories that did particularly well.

Only two other countries in Western Europe grew above 2.0%: Spain, at 2.8%, and tiny Ireland at 2.8%. Everybody else was either flat or down. Of course, compared to the dismal performance of recent years, flat was actually a positive result for much of Western Europe. One prime example: France. After declining 2.9% in 2014, the continent's second biggest licensing market (and number 5 in the world) managed positive growth of 0.5% in 2015 despite unemployment above 10%. The Paris terror attacks in November killed the retail market's momentum and practically wiped out the gains of spring and summer.

Other markets that fell into the "2015 wasn't great but at least it wasn't as bad as last year" category were Italy, which grew 0.4% in 2015 after declining 2.8% in 2014; Spain (28% v. 1.0%); Portugal (1.4% v. 0.1%); and Turkey (0.5% v. -1.5%).

And then there's Greece. Just four years ago, Greece generated \$470 million in sales of licensed goods; in 2015, sales totaled \$232 million. In 2015, things went from bad to worse for the debt-strapped Greeks. After threatening to leave the Eurozone, the Greek government reluctantly accepted its creditors' demands for economic restrictions. The combination of instability and austerity caused drastic cuts in consumer spending. Brands became a luxury few Greeks could afford—unless offered at deep discounts. By the time the year had ended, licensed merchandise sales were down a precipitous 25.6% with prospects for 2016 looking just as bleak.

Continued on page 4

### RETAIL SALES OF LICENSED MERCHANDISE, WORLDWIDE, BY TERRITORY, 2014–2015 (FIGURES IN MILLIONS)

TERRITORY	RETAIL SALES 2015	RETAIL SALES, 2014	CHANGE, 2014-2015	MARKET SHARE, 2015
U.S. and Canada	\$103,276	\$99,873	3.4%	63.3%
Western Europe	\$31,739	\$31,270	1.5%	19.5%
Central and Eastern Europe	\$552	\$598	-7.7%	0.3%
Asia	\$19,846	\$19,412	2.2%	12.2%
Australia and New Zealand	\$2,308	\$2,323	-0.6%	1.4%
Latin America	\$4,084	\$4,120	-0.9%	2.5%
Middle East and Africa	\$930	\$899	3.4%	0.6%
Other	\$387	\$393	-1.5%	0.2%
<b>TOTAL</b>	<b>\$163,121</b>	<b>\$158,888</b>	<b>2.7%</b>	<b>100.0%</b>

SOURCE: THE LICENSING LETTER

## Central and Eastern Europe

As in 2014, Central and Eastern Europe performed the worst of any territory, falling 7.7% from \$598 million to \$552 million in 2015. And as in 2014, Russia was the reason why. After 2014's 10% decline, the Russian market fell another 18.9% to \$226 million. War in the Ukraine led to EU and U.S. sanctions, oil prices fell and inflation was above 15%. Consumer confidence and the purchasing power of Russian consumers sank. "The ruble's decline has been the rough equivalent of a 45% price increase for foreign brands," explains a Moscow-based licensing consultant. Even the billionaires were staying away from stores. Yet, long-term prospects for licensing in Russia remain bright as foreign investment continues to flow into the retail sector and local brands sprout up. Perhaps the most successful example is Masha and the Bear, which has become a billion-dollar global entertainment property.

Russia's struggles also hurt licensed sales in neighboring countries tied to the Russian economy, including Finland (note that TLL categorizes Finland as a Scandinavian country and thus part of Western Europe) and former republics Belarus and, of course, Ukraine.

But the licensing news from CEE was not all bad. Many of the territory's smaller countries did well in 2015, including the Czech Republic, where low inflation, high employment and thriving trade with Germany fueled an economic recovery that transformed 2014's 2.0% decline into 2015's 3.1% gain. Licensed sales were also up in Hungary, Poland, Slovakia, and the Baltic states of Estonia, Latvia and Lithuania.

## Asia

Concern over the slowdown in Asia was a recurring theme among this year's *Survey* respondents and for good reason. The 2.2% growth rate of 2015 was a three-year low and below the global 2.7% average. Asia's global market share remained 12.2%, the first time in several years that it did not rise.

Asia's biggest market and the world's second largest consumer of licensed goods, Japan, remained flat, following 2014's 0.5% growth with a 0.3% decline in 2015. "Abenomics' [Prime Minister Abe's stimulus policies designed to improve consumer confidence and boost spending] appear to be working," notes one local licensing agent. "However, the economy is still just hiccupping along with no signs of a robust recovery." Another agent claims, "the Japanese licensing market will continue to struggle and shrink in the next couple of years. When the economy goes down, licensing goes down more; when the economy recovers, licensing recovers a bit less."

2015 was also a troublesome year for some of the region's other licensing powerhouses, starting with Mainland China, where the growing middle class has eagerly consumed branded products in recent years. But the momentum has slowed. The 6.0% increase of 2015, although double the global average, was a significant falloff from the 9.2% and

8.0% gains of 2014 and 2013, respectively. After so many years of sustained growth, the economic slowdown hit consumers hard, especially in the second half of the year. Government "anti-corruption" policies and devaluation of the yuan slowed luxury sales. The Chinese people saved more of their household income. Other challenges include competition from local brands, unreliable trademark protection and a massive market for counterfeits.

Although some western companies such as Louis Vuitton, Gucci, Burberry, Hugo Boss and Zegna closed (or contemplated closing) shops in China during the year, losses were more than offset by the significant expansions into China by companies like Disney, Playboy, Li & Fung, Luxottica and Paul Frank (owned by Saban Brands).

Several *Survey* respondents suggest that India is the Asian country to watch in the years ahead. The 2015 results seem to bear this out. Already the region's third richest licensing market, India's growth of 9.2% was the highest in not only Asia, but the entire world (at least among the top 50 markets). And that estimate is conservative. "Retail in India is growing 10% to 15% year-over-year, thanks to online," according to a local agent.

Although e-commerce is growing rapidly all across Asia, it is particularly crucial to development of retail in India. Consumer demand for branded products in India is huge; but so are the obstacles of meeting it, including lack of modern industrial infrastructure, poor roads and extremely high taxes, rental, and labor costs. These conditions squeeze the profit margins of traditional chain stores and make e-commerce an attractive option. "Close to 80% of Indian retail is still unorganized," meaning mom-and-pop operations, the agent explains. "India is basically skipping mass merchants and moving directly to e-commerce and mobile commerce."

In many other Asian countries, the pattern was largely the same: modest growth but at rates below recent years:

**GROWTH IN RETAIL SALES OF LICENSED MERCHANDISE, SMALLER ASIAN MARKETS, 2012-2015**

MARKET SIZE RANK, ASIA	COUNTRY	2015 GROWTH	2014 GROWTH	2013 GROWTH	2012 GROWTH
4	Taiwan	2.2%	3.0%	2.1%	1.5%
5	South Korea	2.3%	2.8%	3.1%	5.1%
6	Hong Kong	1.6%	3.5%	2.0%	1.2%
7	Singapore	0.6%	1.0%	-0.1%	1.9%
8	Philippines	4.1%	4.5%	5.1%	0.8%
9	Malaysia	0.3%	2.8%	2.9%	5.1%
10	Indonesia	0.5%	3.0%	4.0%	8.1%
11	Thailand	2.5%	3.5%	4.8%	7.8%

SOURCE: THE LICENSING LETTER



One outlier is Vietnam, where 2015's growth of 7.5% outpaced growth of the last three years; 7.0% (2014), 0.0% (2013) and 2.1% (2012).

### Middle East & Africa

Although it hurt licensed sales everywhere outside the U.S., the high value of the dollar was particularly hard on developing countries, including in Africa. Low oil prices also reduced consumer spending in the Middle East. Even so, at 3.4% the Middle East and Africa tied the U.S./Canada for most growth of any territory (albeit on significantly smaller base of only \$930 million in sales, or 0.6% of the world market). The bad news is that 2015 growth was a full percentage point below the previous year's 4.4%.

South Africa, the territory's largest market for licensed goods, was up 3.4%—below the 5.0% growth of 2014 but still impressive for a nation wracked by political instability, inflation and drought. The other bright spot is the continued development of countries in the sub-Saharan region of central Africa, including Nigeria, which is vying to become the continent's fashion capital; Kenya, which has the region's fastest growing apparel industry; and Ethiopia, whose rich resources and over 90 million population are luring retail investment despite the country's primitive industrial infrastructure. Although GDP is growing rapidly in all of these countries, consumption of licensed goods still remains too small to make a big impact on the totals.

Strong performances in the Middle East's three richest markets, Saudi Arabia (3.3%), UAE (3.3%) and Qatar (3.0%), offset flat or declining sales in the region's other countries. While entertainment and fashion grew the most, the sports and corporate/trademark sectors also posted gains.

### Australia & New Zealand

After two straight years of 2.0% growth, Australia and New Zealand lost roughly \$15 million in 2015, a decline of 0.6% to \$2.3 billion. The region's tepid economy, decline of the Australian dollar and a fixed grey/counterfeit market contributed to a 1.0% decline in the world's 10th leading market for licensed goods.

New Zealand fared better, posting positive growth of 2.2%. While New Zealanders are constantly urged to "buy local," exemption from sales tax on products under NZ \$400 and offers of free shipping have made foreign brands more attractive. The country's economic recovery enabled New Zealanders to yield to both temptations in 2015.

### Latin America

Latin America declined 0.9% in 2015. In a territory where foreign entertainment and fashion properties generate most of the licensed sales, the strong U.S. dollar was a significant drag on growth. Brazil, the territory's biggest market, lost 3.8% in 2015. Continuing recession, high inflation, and a mid-year sales tax hike made for a retail blood bath with over 500 stores shuttering country-wide by year's end. The luxury and fashion sectors were particularly hard hit; but

their losses were to some extent the value channel's gains.

Unstable economic and political conditions also continued in Argentina, which has suffered an aggregate 5.4% decline over the past two years (-1.7% in 2015). Once a bright spot, Chile continued to slow, growing only 1.5% in 2015 (v. 3.0% in 2014, 3.7% in 2013 and 5.2% in 2012). Smaller Latin America countries were also either flat or down including markets that had been on the upswing such as Colombia, Costa Rica, Ecuador and Uruguay.

One positive market was Mexico (the second largest market in Latin America), which grew 3.6% despite low worldwide oil prices. "Inflation is still high but coming down," notes one local licensee. Value chains proved a fertile source of licensed sales, including Walmart de México, the country's largest retailer, which posted big profits despite a major bribery scandal.

### Property Type Trends

Sales of goods based on entertainment properties grew 6.3% in 2015, by far the highest of any property type. By gaining \$1.7 billion, entertainment increased its worldwide share from 17.0% to 17.6% in a single year. The narrative is best described by a single phrase Survey respondents uttered over and over again: "Disney dominance." The 2015 roster of dominant Disney properties included a potent combination of perennials including Marvel, Mickey & Friends and Princesses in addition to blockbuster films like *Star Wars: The Force Awakens*, *Frozen*, and *Avengers: Age of Ultron*.

But there were also plenty of non-Disney properties in the 2015 success mix, including Minions, Ninja Turtles, Paw Patrol and SpongeBob. A growing number of non-U.S. entertainment properties are also challenging Disney's worldwide dominion, including Hello Kitty (Japan), Peppa Pig (U.K.), Masha the Bear (Russia) and Purple Turtle (India).

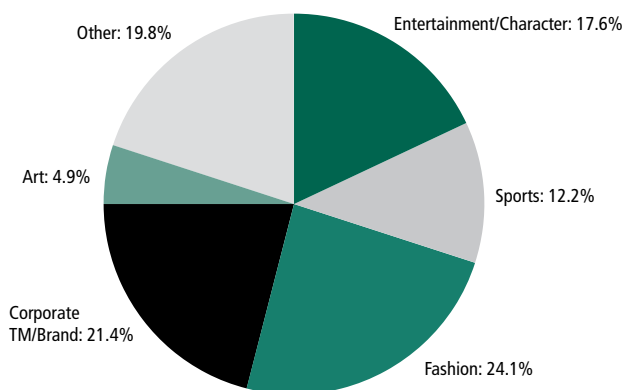
RETAIL SALES OF LICENSED MERCHANDISE, WORLDWIDE, BY PROPERTY TYPE, 2014-2015 (FIGURES IN MILLIONS)				
PROPERTY TYPE	RETAIL SALES, 2015	RETAIL SALES 2014	CHANGE, 2014- 2015	MARKET SHARE, 2015
Entertainment/Character	\$28,709	\$27,011	6.3%	17.6%
Sports	\$19,901	\$19,384	2.7%	12.2%
Fashion	\$39,312	\$37,974	3.5%	24.1%
Corporate TM/Brand	\$34,908	\$34,161	2.2%	21.4%
Art	\$7,993	\$8,580	-6.8%	4.9%
Other	\$32,298	\$31,778	1.6%	19.8%
<b>TOTAL</b>	<b>\$163,121</b>	<b>\$158,888</b>	<b>2.7%</b>	<b>100.0%</b>

SOURCE: THE LICENSING LETTER

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### RETAIL SALES OF LICENSED MERCHANDISE, WORLDWIDE, BY PROPERTY TYPE, 2015



SOURCE: THE LICENSING LETTER

One of the big stories of 2015 was the expanded licensing of Japanese anime properties, most notably Pokémon and newcomer Yo-Kai Watch. Another source of growth is adult products based on U.S. TV show properties like “Game of Thrones,” “Walking Dead,” “Breaking Bad,” and gameshows (particularly from the U.K.).

The concern with entertainment licensing is that it has become top-heavy. “Retailers are increasingly risk-averse and willing to invest only in established brands,” laments an Italian licensee. “These are good times for licensors and licensees of ‘A’ properties,” adds a U.K. consultant, “but if you’re trying to license an emerging property, especially one tied to a movie, good luck.”

Fashion, the largest segment of the market with a 24.1% share and \$39.3 billion in sales, was the only other

property type to outgrow the general industry in 2015—3.5% v. 2.7%. All other property types were below not just the 2.7% industry rate (other than sports which matched it), but also world GDP growth of 2.4%. Sports did well in the U.S./Canada (4.8% growth) but was flat in Europe and Asia. Among the remaining property types, the massive trademark segment performed the best with 2.2% growth and \$34.9 billion in sales. Art was down for the second year in a row with a loss of 6.8%. “Although the volume of art deals remains great, cycles, royalties, and margins are being compressed,” comments one licensing agent.

### Product Category Trends

Product category performance in 2015 was influenced by two key factors: property type and retail channel. Products were likely to do best if they were: i. based on entertainment, fashion or sports properties; and ii. sold online or via value, dollar/discount and/or grocery channels. Conversely, products were most likely to struggle if they were: i. based on corporate/trademark and/or art properties; and ii. sold in specialty or department stores.

Accordingly, the year’s strongest product category was toys and games, which grew 5.8% to \$18.1 billion, 11.1% of the market. Growth was fueled almost entirely by traditional toys; sales of electronic games were flat. Almost as impressive was the 3.9% growth of the massive apparel/accessories/footwear product category, which at over \$66 billion represents over 40% of all licensed goods purchases worldwide. Athleisure, sportswear, pro sports-branded off-field soft goods (especially for women and children) and eyewear were among the strongest performing products in this category; cold weather wear, handbags and fine jewelry were among the weakest.

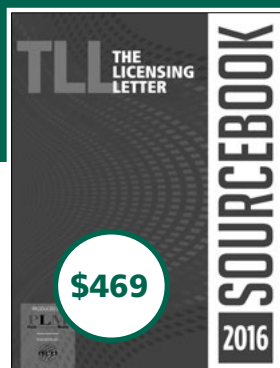
### RETAIL SALES OF LICENSED MERCHANDISE, WORLDWIDE, BY PRODUCT CATEGORY, 2014-2015 (FIGURES IN MILLIONS)

PRODUCT CATEGORY	RETAIL SALES, 2015	RETAIL SALES, 2014	CHANGE, 2014-2015	MARKET SHARE, 2015
Apparel/Accessories/Footwear	\$66,064	\$63,555	3.9%	40.5%
Toys/Interactive Games	\$18,155	\$17,160	5.8%	11.1%
Home Furnishings/Housewares/Domestics	\$12,218	\$12,076	1.2%	7.5%
Food/Beverage	\$11,924	\$11,599	2.8%	7.3%
HBA	\$11,288	\$11,122	1.5%	6.9%
Publishing	\$8,596	\$8,421	2.1%	5.3%
Stationery/Paper	\$5,220	\$5,243	-0.4%	3.2%
Gifts/Novelties	\$4,567	\$4,608	-0.9%	2.8%
Other	\$25,088	\$25,104	-0.1%	15.4%
<b>TOTAL</b>	<b>\$163,121</b>	<b>\$158,888</b>	<b>2.7%</b>	<b>100.0%</b>

SOURCE: THE LICENSING LETTER

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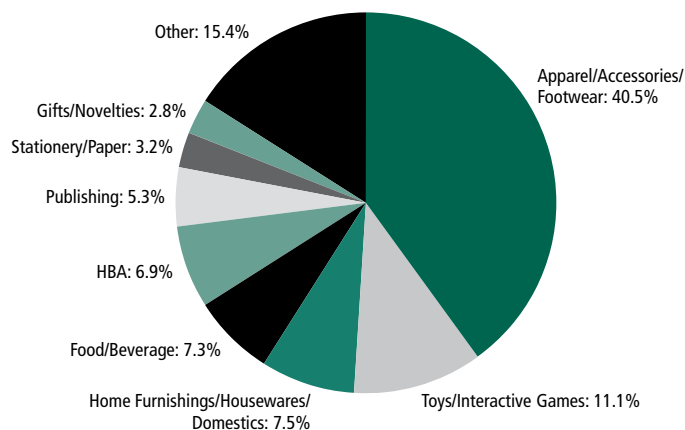
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At 2.8%, food/beverage was the only other product category to grow faster than general licensing industry and world-wide GDP, with health and fitness and demand for luxury brands in the U.S., Europe, and wealthy countries of Asia and the Middle East providing much of the impetus. All other product categories were flat or down for the year, including:

- ▶ Publishing, which managed modest 2.2% growth for the second year in a row;
- ▶ HBA, whose 1.5% gain looks much better when you consider that the category fell 1.7% in 2014;
- ▶ Home furnishings/housewares/domestics, which replicated last year's 1.2% growth; and
- ▶ Two product categories which posted declines for the fifth year in a row (albeit at lower rates than in 2014): gifts/novelties (down 0.9% v. -4.7% in 2014); and stationery/paper (-0.4% v. -3.1%);
- ▶ Other, the second biggest category at 15.4% share, lost 0.1% after growing 3.7% in 2014, despite strong sales of sporting goods, electronics, and electronics accessories.

#### RETAIL SALES OF LICENSED MERCHANDISE, WORLDWIDE, BY PRODUCT CATEGORY, 2015



SOURCE: THE LICENSING LETTER

## RETAIL

### Survey Delivers the Low Down on Dollar Store Shoppers

A new secret shopper survey brings to light the characteristics and habits of shoppers in one of the fastest-growing retail channels for licensed merchandise: dollar stores.

Amid strong overall sales and earnings growth for channel leaders Dollar Tree and Dollar General (see related story), U.S. and Canadian sales of licensed merchandise in the dollar/value/off-price channel grew 0.4% in 2015, according to TLL's Annual Licensing Business Survey. This channel now accounts for just under 10% of licensed merchandise sales and was the fastest growing behind only e-commerce.

While the changes in market share are mostly very small, the dollars involved are not. With retail sales of licensed merchandise in the U.S. and Canada accounting for just over \$103 billion in 2015, a one-tenth of a percent change represents more than \$100 million, so the dollar/value/off-price channel grew by an estimated \$400 million-plus last year.

According to "Dollar Stores in a Digital Age," a new report from secret shopper and market research firm Field Agent, the Dollar General and Family Dollar chains alone account for more than 20,000 storefronts across the U.S., making them more ubiquitous than McDonald's.

The company earlier this month surveyed 500 shoppers about their attitudes and behaviors toward dollar stores and found:

- ▶ Almost everyone sometimes uses dollars stores. 97% of respondents shopped at dollar stores, including: 34% often, 30% sometimes and 24% rarely.
- ▶ Older consumers use dollar stores more than younger consumers. 31% of millennials said they rarely or never shop at dollar stores, compared to 17% of baby boomers.

- ▶ People within a wide income range shop at dollar stores. 46% of shoppers with household incomes under \$35,000 "often" shop at dollar stores; 30% in the above \$50,000 income category also shop in the channel.
- ▶ The top product category purchased from dollar stores is heavily licensed.

Respondents said they purchase party supplies (56%) at dollar stores more than any other product category, with home cleaning supplies (56%), candy/gum (51%), office/school supplies (48%) and salty snacks (45%) rounding out the top 5.

The popularity of dollar stores hasn't gone unheeded by mass merchant Target, despite its trendy position a ways up the retail food chain. The company near the end of 2015 made over its front of the store dollar section as the more brightly merchandised "Bullseye's Playground," featuring the store's mascot, Bullseye the dog, and a family friendly selection of seasonal products.

At one of Target's "LA25" concept stores in Culver City, Calif., last month that meant lots of \$1 to \$3 items tied to Disney's *Finding Dory*, which launched in theaters June 3. The selection included books, coloring books, playsets, small toys, socks and other items. Minions, Frozen and Star Wars toys also could be found in the dollar section.

While movie merchandise once made it to dollar store shelves only after it failed to sell elsewhere, in the past couple of years entertainment licensors have begun to sign licensees to drive strategically low priced merchandise in the dollar channel at the same time that higher-priced merchandise goes into e-commerce, mass merchants, department and specialty stores.

# Licensing News

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

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Ana Davis	Artist whose work is classic—with a twist, inspired by architectural details and vintage elements.	All	John Mavrakakis, Ideaologie
Billy Goat Tavern (The)	Chicago landmark, home of the Original Chicago Burger, serving its "Cheezborgers" to Chicagoans since 1934.	Apparel, food, gifts, novelties, publishing	Andrew Lieb, JRL Group
Darren Gygi	A dynamic, stylized artist whose gallery quality painting techniques echo the old masters.	Gift items, greeting cards, home decor, stationery	Marty Segelbaum, MHS Licensing + Consulting
Drakers (The)	TV series aimed at boys 4–8 years-old stars two friends and their passion for motor racing and competition.	All	Sondra Contino, Lawless Entertainment
Lisa Jane Smith	Artist motivated by the quirky and hilarious behavior of others in amusing situations and lively conversations to create enjoyable, delightful works of art.	Garden decor, gift items, greeting cards, home decor, stationery	Marty Segelbaum, MHS Licensing + Consulting
Malibu	Rum brand driven by lifestyle, summer and a positive attitude.	All	Larry Seidman, Dimensional Branding Group (DBG)
Mega Man (TV series)	Animated series for kids 6–9 based upon the Capcom Mega Man video game franchise to air in 2017, coinciding with the franchise's 30th anniversary.	All	Marc Harrington, Dentsu Entertainment USA
Michael Miller Fabrics	New York City based design company with wide range of fabrics from floral prints and classic damasks to tried and true basics.	All	Rob Mejia, RJM Licensing
Miniclip	Online games website develops, publishes and distributes games to an audience of 200 million monthly active users.	All	Larry Seidman, Dimensional Branding Group (DBG)
Rebecca Stoner	U.K.-based designer specializing in surface pattern design in a delicate, sophisticated style.	Garden decor, gift items, greeting cards, home decor, stationery	Marty Segelbaum, MHS Licensing + Consulting
Sissi the Young Empress	Animated girls' TV series follows the magical life of Elisabeth of Wittelsbach through adventure, love and intrigue.	All	Sondra Contino, Lawless Entertainment
Talking Tom	Most downloaded mobile game character app of all time with over 3.6 billion downloads.	All	John Leonhardt, Dimensional Branding Group (DBG)
This Old House	Home improvement brand provides advice for homeowners through two TV series, a magazine, books and online.	Home decor, home improvement products, paint, tools	Ross Misher, Brand Central

## Licenses Recently Granted, U.S.

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
AC/DC	Fabrica de Tequilas Finos SA	Spirits	Epic Rights
Andy Black	Trends International	Posters	BandMerch/Topspin Media
Angry Birds	IDW Publishing	Comic books	Kaiken Publishing Ltd. (Rovio Entertainment affiliate)
Are You Dissing Me	Acco Brands	Calendars	Dimensional Branding Group (DBG)
Aviva Stanoff	Jaipur Rugs	Home decor, rugs	Aviva Stanoff Design
BandMerch	Trevco	Home goods	BandMerch/Topspin Media
Barry Rosenthal	Galison/Mudpuppy	Journals, puzzles	Moxie & Co.
	Pomegranate Communications	Wall calendars	
Batman Unlimited	StoryToys	Mobile educational apps	DC Entertainment
Beatles (The)	Vandor Products*	Coaster sets, mugs, salt & pepper sets, tumblers, water bottles	Bravado Intl. Group Merchandising Services
British Motor Heritage	Tannenbaum Treasures	Glass ornaments	Moxie & Co.
BSA	Desperate Enterprises	Magnets, tin signs, tin thermometers	Sharpe Company (The)
Care Bears	Vandor Products	Mealtime & feeding sets, mugs, shopper totes, tin totes, travel cups, water bottles	American Greetings Entertainment
Dirty 30	Represent.com	Accessories, apparel	Lionsgate
Doctor Strange	Vandor Products	Glass ornaments, mugs, tin totes	Disney Consumer Products
Erin Smith Art	Sellers Publishing	Day calendars	Moxie & Co.
F in Exams	Pressman Toy/Goliath Games	Board games	Dimensional Branding Group (DBG)
Finding Dory	Cartamundi Group	Card games	Disney Consumer Products
Flintstones (The)	Enesco*	Figures	Warner Bros. Consumer Products
Garfield	R&H Theatricals	Musicals	Paws, Inc.
Hardy Boys	Cobble Hill Puzzle Co. div Outset Media	Puzzles	Moxie & Co.
	Dynamite Entertainment	Comic books	
	Litographs	Posters, t-shirts, temporary tattoos, totes	
Have a Little Pun	Acco Brands	Calendars	Dimensional Branding Group (DBG)
Hello! Lucky	Papyrus/Recycled Paper Greetings	Greeting cards	Moxie & Co.

\*Extension or renewal.

Continued on page 9



## Licensing News Continued from page 8

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Highlights	Acco Brands	Calendars	Dimensional Branding Group (DBG)
	Buy Seasons	Party goods	
KISS	Bif Bang Pow!/Entertainment Earth*	Shot glasses	Epic Rights
Laura Ashley	Delmar Intl.	Jewelry	Laura Ashley
Looney Tunes	Enesco*	Figures	Warner Bros. Consumer Products
Lynn Sanchelli	Toland Home & Garden	Garden flags	MHS Licensing + Consulting
Molly Hatch	C.R. Gibson	Paper products	Moxie & Co.
	Chronicle Books	Coloring books	
	KAF Home	Kitchen textiles	
	Laurelbox	Tea towels	
	Twig New York div. Hankook Chinaware	Porcelain tableware	
Movie Title Typos	Acco Brands	Calendars	Dimensional Branding Group (DBG)
Mr. Robot	Rasta Imposta	Masks	Joy Tashjian Marketing Group
MTA New York City Transit	adidas	Footwear	Moxie & Co.
	KeepCool USA	Messenger bags	
	Montblanc	Backpacks	
	Terez	Apparel, leggings	
	Tiffany & Co.	Promotional products	
	UNIQLO	Accessories, apparel	
Nancy Drew	Cobble Hill Puzzle Co. div Outset Media	Puzzles	
	Her Interactive	Mobile game apps	
	Litographs	Posters, t-shirts, temporary tattoos, totes	
Nas x Ghostbusters	Tokyobike New York	Bikes	Sony Pictures Consumer Products
Nate Berkus	Target	Furniture, home decor	Nate Berkus
One-Punch Man	Ata Boy	Magnets, pins	Viz Media
	Bioworld Merchandising	Bags, gloves, headwear, hosiery, loungewear, scarves, underwear, wallets	
	Great Eastern Entertainment	Accessories, novelties	
	Isaac Morris	Accessories, apparel	
	Trends International	Posters	
Peppa Pig	Candlewick Press*	Publishing	Entertainment One (eOne)
	Cardinal Industries	Playing card sets	
	DreamWave div. Bentex Group	Swimwear	
	Esquire Footwear*	Footwear	
	H2W/Sunstaches	Sunglasses	
	JAKKS Pacific	Novelties, toys	
	Jazwares*	Electronics	
	Northwest Co. (The)	Tapestry throws	
	Playhut	Play tents	
Pete the Cat	Scholastic Media*	Publishing	MerryMakers
	Enesco/Department 56	Ornaments	
	Everything Legwear	Hosiery, socks	
Rainbow Fish (The)	Marcus Brothers	Fabric	RJM Licensing
RWBY	Bioworld Merchandising	Accessories, apparel	Jazwares
	Hot Topic	Accessories, apparel, toys	
Scripps National Spelling Bee	Macmillan Publishing	Books (children's)	Moxie & Co.
	Rizzoli Intl. Publications	Wall calendars	
Shimmer & Shine	H2W/Sunstaches	Novelty sunglasses	Nickelodeon & Viacom Consumer Products
Shopkins	Edge Brands	Pool products	Moose Toys
Sofia Vergara	Avon Products	Fragrance	Latin World Entertainment Licensing
Star Trek	Mattel	Dolls	CBS Consumer Products
Star Wars	Propshop	Prop replicas	Disney Consumer Products
Teenage Mutant Ninja Turtles: Out of Shadows	Rubie's Costume	Accessories, costumes	Nickelodeon & Viacom Consumer Products
Terry Doughty	Toland Home & Garden	Garden flags	MHS Licensing + Consulting
Transformers	Backflip Studios	Mobile game apps (Android & iOS)	Hasbro

Continued on page 10

## Licensing News *Continued from page 9*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Van Gogh Museum	Robert Kaufman Fabrics	Fabric	Moxie & Co.
	September Publishing	Gift books, note cards	
Who (The)	Chaser	Fashion tops (women's, girls')	BandMerch/Topspin Media
Wundernauts (The)	Radio Days	Graphic novels	Tails of Whimsy

## International Properties Available or Recently Assigned

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
AMP Energy	Energy drink brand ranks #4 in retail sales for the U.S.	All (Worldwide)	James Slifer, Joester Loria Group
AS Roma	Professional soccer team in Rome, founded in 1927.	All (U.S., Canada)	David Gebel, One Entertainment
Babymouse	Award-winning graphic novel book series showcasing the trials and tribulations of elementary school.	All (U.S., Canada)	Joan Packard Luks, Serenata Group (The)
Beyblade Burst	Reboot of Japanese anime based on spinning-top franchise debuted last month.	All (CEE, Nordics, Russia/CIS)	Morten Geschwendtner, Ink ALC (Denmark)
	Reboot of Japanese anime based on spinning-top franchise debuted April.	Apparel, toys (Germany)	Peter Kleinschmidt, m4e AG
Billboard	Entertainment media news brand known for its top music charts.	Accessories, apparel, electronics, food, toys (EMEA)	Steve Manners, CPLG U.K. (Copyright Promotions Licensing Group)
Bing	British preschool CGI animated TV series stars a toddler bunny as he learns new ways to experience the world. Product launch to come in second half of 2017.	All (Spain, Portugal)	Pilar Fernandez-Vega, El Ocho Licencias y Promociones SI
BRIO	Swedish toy company. First products in baby care, housewares and textiles expected to launch Q2 2017.	All (Worldwide)	Morten Geschwendtner, Ink ALC (Denmark)
Chivas Guadalajara	Mexican football club populated exclusively by Mexican players.	All (U.S., Canada)	David Gebel, One Entertainment
Felix the Cat	Classic cartoon character created in 1919 and one of the first-ever animated superstars.	All (North America, EMEA)	Steve Manners, CPLG U.K. (Copyright Promotions Licensing Group)
Frida Kahlo	Mexican painter known for her self-portraits, whose work is celebrated for its feminist and indigenous elements.	Apparel, gifts, stationery (U.S., Canada, Mexico)	David Gebel, One Entertainment
Guardians	First Russian superhero squad blockbuster; set during the Cold War.	All (Russia, CIS)	Denis Kulakov, brand4rent
Gumball 3000	Aspirational lifestyle brand combining automobiles, music, fashion and entertainment and centered around a week-long supercar rally.	All (U.K.)	Mike Jenkinson, TSBA
Hesketh Racing	U.K. racing team that competed in 52 World Championship Grands Prix, with one win and 8 podium finishes.	All (Worldwide)	Andrew Maconie, Licensing Management Intl.
IFLScience	Web-based brand makes the amazing world of science accessible and amusing.	Apparel, gifts, novelties, stationery, toys (Central, North & South America)	David Gebel, One Entertainment
Just for Laughs	Largest comedy festival in the world with global web and TV presence in over 135 countries.	All (North America)	Dean Koocher, Brandvida
Loteria	Bingo-like Mexican card game known for its engaging designs.	Apparel, gifts, publishing, stationery (U.S., Canada, Mexico)	David Gebel, One Entertainment
Louisiana State University	Flagship public university known as "The Tigers" ranks 6th in sales for all CLC partners across over 6,660 retail accounts across the U.S.	All (Worldwide; thru 2026)	Cory Moss, Collegiate Licensing Co. (CLC)
Match of the Day	U.K. football program with 50 years of heritage; first merchandise to arrive this fall.	All (U.K.)	Dom Wheeler, Brands With Influence
Mega Man (TV series)	Animated series for kids 6–9 based upon the Capcom Mega Man video game franchise to air in 2017, coinciding with the franchise's 30th anniversary.	All (Asia)	Marc Harrington, Dentsu Entertainment USA
		All (Worldwide excl. Asia)	Tom Roe, DHX Brands
Terry O'Neill & Baron Wolton Photography (Iconic Images)	1960's and 70's photographers known for their work in fashion, style and celebrities.	All (U.K.)	Mike Jenkinson, TSBA
Tito's Tacos	One of Los Angeles' most famous landmark Mexican food restaurants.	All (Worldwide)	Michael Catalano, Prominent Brand + Talent
Tottenham Hotspur	English football club competes in the Premier League.	Accessories, apparel (South Korea)	Jason Lee, Infiniss Co. Ltd.
Trucktown	Preschool TV series stars a group of rough and tumble young trucks. Original book series includes over 50 titles, selling over 1 million copies worldwide.	All (Chile)	Maria del Mar Cabanillas Frias, Agosin Licensing
		All (Peru, Bolivia)	AMV Licensing
		All (Middle East)	Ahmad Weiss, Arabian Licensing Co. (ALC)
		All (Caribbean)	Robert Espallat, Big Star Licensing Group
		All (Spain, Andorra)	Maria Alvares, BRIGHTS Iberia
		All (Israel)	Yossi Fox, LDI Israel
		All (South Korea, Philippines, Singapore, Malaysia, Indonesia, Thailand, Vietnam, India)	Hubert Co, EMC Empire Multimedia Corp.
		All (Argentina, Paraguay, Uruguay)	Carlos Kaganas, Exim Licensing (Argentina)
		All (Brazil)	Marcus Marcedo, Exim Licensing (Brazil)
		All (Colombia, Ecuador)	Ximena Duque, Exim Licensing (Colombia)

\*Extension or renewal.

*Continued on page 11*

## Licensing News *Continued from page 10*

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Trucktown	Preschool TV series stars a group of rough and tumble young trucks. Original book series includes over 50 titles, selling over 1 million copies worldwide.	All (Mexico)	Jamie Hofman, Exim Licensing (Mexico)
		All (France)	Nathalie Bobineau, FranceTV Distribution
		All (Guatemala, Belize, El Salvador, Honduras, Nicaragua, Costa Rica, Panama)	Maricarmen Ramirez, MON Licensing
		All (Germany, Austria, German-speaking Switzerland)	Claude Schmit, Super RTL
Yo-Kai Watch	Japanese anime centers around a young boy whose watch allows him to fight and capture mischievous spirits.	All (Latin America)	Elias Fasja Cohen, Tycoon Enterprises (Mexico)

## International Licenses Recently Granted

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Al Agnew	LANG Companies (The)	Calendars, planners (Worldwide)	MHS Licensing + Consulting
	North American Art	Wood wall decor (U.S., Canada)	
	Ramatex Intl.	Raschel throws (U.S., Canada)	
Amylee Weeks	Bon Art/Artique	Wall decor (Worldwide)	
	Enchante Accessories	Albums, diaries, gift bags, journals, note pads, sketchbooks, storage boxes (Worldwide)	
Angry Birds	BPlus Mongolia	Books (Mongolia)	Kaiken Publishing Ltd. (Rovio Entertainment affiliate)
	Centum Books	Books (U.K.)	
	Editions Larousse	Books (France)	
	Gramedia Pustaka Utama	Activity books, books, comic books (Indonesia)	
	Hachette Livre	Books (France, Spain)	
	HarperCollins Children's Books	Books (U.S., Canada)	
	Le Lombard	Comics (France)	
	Panini Group S.p.A.	Stickers (Worldwide)	
	Panini Group S.p.A.	Comics, magazines (Europe, Mexico)	
	Penguin Random House	Books (France, Spain)	
	Shanghai 99 Readers' Culture Co., Ltd.	Comics (China)	
Audrey Jeanne Roberts	York Wallcoverings & RoomMates	Wallpaper borders (Worldwide)	MHS Licensing + Consulting
BandMerch	Philcos	Accessories, glassware, mugs, t-shirts (Canada)	BandMerch/Topspin Media
	Plastic Head Music Distribution Ltd.	Accessories, apparel (Europe)	
Beachbody	Global Brand Partners Pte. Ltd.	Apparel, footwear (Worldwide)	Beachbody
BSA	7 Vision	Leather goods (U.K.)	Licensing Management Intl.
	Mistiarn Pty Ltd. tda Mitch Dowd Design	Apparel (ANZ)	
Care Bears	IconLogin	Mobile apps (Worldwide)	American Greetings Entertainment
Christine Adolph	WinCraft	Flags (U.S., Canada)	MHS Licensing + Consulting
Collin Bogle	Occasions Group	Greeting cards (U.S., Canada)	
	Stony Creek at Home	Glass lamps (U.S., Canada)	
Corbert Gauthier	Enchante Accessories	Storage boxes (Worldwide)	
Cranston Collection	Cards Direct	Greeting cards (U.S., Canada)	
Darrell Bush	Cards Direct	Greeting cards (U.S., Canada)	
	HI Look	Microfiber cloths (Worldwide)	
	North American Art	Wood wall decor (U.S., Canada)	
Doom	Level Up Wear (LVLP)	Apparel (Europe)	Bioworld Merchandising Europe
Fatal1ty	Monster Cable	Headphones (Worldwide)	Anders Minkler Huber & Helm
Garfield	Peter Alexander div. Just Group	Loungewear, sleepwear (ANZ)	Paws, Inc.
Gas Monkey Garage	Changes	Apparel (Europe)	Brandgenuity
	Hybris Production AB	Baseball caps, beanies, messenger bags, mobile device & tablet protective cases, mugs, sweatshirts, t-shirts (U.K., Ireland)	
	In Phase Intl. Ltd.	Automotive accessories (Europe)	
Ghostbusters	USAOPOLY	Puzzles (U.S., Canada)	Sony Pictures Consumer Products
H. Hargrove	Ball Aerosol	Food tins (Worldwide)	MHS Licensing + Consulting
	Posty Cards	Greeting cards (U.S., Canada)	
Hautman Brothers	Cottage Garden	Music boxes (U.S., Canada)	
	West Coast Novelty	Apparel, headwear (U.S., Canada)	
Horrid Henry	T-Shirt Booth/Digital Giving	Customizable t-shirts (U.K.)	Novel Entertainment Ltd.

\*Extension or renewal.

*Continued on page 12*

## Licensing News *Continued from page 11*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
James Meger	North American Art	Wood wall decor (U.S., Canada)	MHS Licensing + Consulting
	Occasions Group	Greeting cards (U.S., Canada)	
	Opportunity Buys	Dream catchers (U.S., Canada)	
Josephine Kimberling	Evergreen Enterprises	Flags, floor mats, glasses, mugs, napkins, pillows, towels, tumblers, wall decor (U.S., Canada)	
Kathy Hatch	Bungalow Flooring	Comfort mats, doormats, runners (U.S., Canada)	
	DesignScapes	Gift bags (U.S., Canada)	
Kim Norlien	HI Look	Microfiber cloths (Worldwide)	
	Stave Puzzles	Wooden jigsaw puzzles (Worldwide)	
Little Charmers	Little Cosmetics	Pretend makeup (North America)	Corus Entertainment/Nelvana Enterprises, Harris-Sachs
Little House on the Prairie	Dundalk LeisureCraft	Wood furniture (U.S., Canada)	Knockout Licensing
London Blue Plaques	Product of Your Environment	Collectible plates (U.K.)	English Heritage
Lynn Sanchelli	Trends International	Calendars, gift bags, gift wrap, posters (U.S., Canada)	MHS Licensing + Consulting
Marcie St. Claire	Dimensions Crafts	Cross-stitch kits (Worldwide)	
Marmite	Joe & Seph's	Gourmet popcorn (U.K.)	Unilever U.K.
Mickey Mouse	Coach	Accessories, bags, collectible dolls, sneakers, t-shirts (Worldwide)	Disney Consumer Products
Miffy	Simon & Schuster Children's Publishing	Books, e-books (Worldwide)	Mercis B.V.
Minecraft	NetEase	Games (China; 5 yrs.)	Mojang div. Microsoft
MLS	Bulletin Canada	Fleece tops & bottoms, t-shirts (North America)	Major League Soccer (MLS)
	Mascot Factory	Custom plush (North America)	
	Rise Sport	Sunglasses (North America)	
	Rock 'Em Apparel	Apparel (North America)	
	SkinIt Acquisition	Electronic device skins & cases (North America)	
	Strideline	Socks (North America)	
Nas x Ghostbusters	Fila U.S.A.	Footwear (Worldwide)	Sony Pictures Consumer Products
	Italia Independent Group S.p.A	Eyewear (Worldwide)	
	Monster Cable	Headphones (Worldwide)	
	New Era Cap	Caps (Worldwide)	
NASCAR	DMI Inc. dba Dusenberry Martin Racing	Video games (North America)	NASCAR
Natura	Zedbed	Mattresses (Canada)	Natura World
Next Step (The)	Limelight Dancewear	Apparel (Canada)	Boat Rocker Media
Noddy	DC Thomson	Magazines (U.K.)	Bulldog Licensing
Petra's Planet	Event! Merchandising	Apparel (U.K.)	Blonde Sheep Licensing
	T-Shirt Booth/Digital Giving	Customizable t-shirts (U.K.)	
Playboy	Already dba Yums	Baseball caps (U.S., Canada)	Playboy Enterprises
	Gumi Apparel	Leather bags, leather goods, wallets (South Korea)	
	Lumyook Food Co., Ltd.	Themed cafe/restaurants (Thailand)	
	New Era Japan GK	Accessories, apparel (men's, women's), co-branded headwear (Japan)	
	Shinsung Tongsang	Accessories, co-branded apparel (South Korea)	
Sesame Workshop	PlayKids div. Movable	Mobile book apps (Worldwide)	Sesame Workshop
Shaun the Sheep	Trixie	Pet products (Denmark, Finland, France, GAS, Italy, Norway, Sweden, U.K.)	WDR Mediagroup Licensing GmbH
Smiley World	C&A China	Accessories, denim, dresses, footwear, shirts, sweatpants (China)	SmileyWorld
	Compagnie Pâtissière	Tartlets (Europe)	
Star Trek	Jumbo Games	Puzzles (U.K.)	CPLG U.K. (Copyright Promotions Licensing Group)
Stephanie Ryan	Image Conscious Publishing	Wall decor (Worldwide)	MHS Licensing + Consulting
	Thirstystone Resources	Stone coasters (U.S., Canada)	
Super Mario	Mattel	Card games (Japan)	Nintendo of America
Super Wings	Cerdá Group	Apparel, back-to-school, footwear, gift products (Iberia)	Nottingham Forest
	Dolci Preziosi Iberica S.L.	Confectionery (Iberia)	
	Panini España	Collectibles, magazines (Iberia)	
	Stor S.L.	Tableware (Iberia)	
Ted Baker	Portmeirion Group PLC*	Housewares, teaware (Worldwide)	Ted Baker London
Teenage Mutant Ninja Turtles	Character World/TDS Enterprises	Bedding, bedding accessories (U.K.)	Nickelodeon & Viacom Consumer Products

\*Extension or renewal.

*Continued on page 13*



## Licensing News *Continued from page 12*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Teenage Mutant Ninja Turtles	Just Hype Ltd.	Accessories, apparel, caps, jackets, t-shirts, tote bags (Belgium, Channel Islands, China, Denmark, Finland, France, Germany, Hong Kong, India, Indonesia, Ireland, Italy, Malaysia, Netherlands, Norway, Poland, Spain, Sweden, Switzerland, Thailand, U.K.)	Nickelodeon & Viacom Consumer Products
Terry Doughty	Canterbury Potteries	Ceramic mugs (U.S., Canada)	MHS Licensing + Consulting
	North American Art	Wood wall decor (U.S., Canada)	
	Northcott Silk	Fabric (Worldwide)	
Tina Higgins	Certified Intl.	Dinnerware (North America)	
	Enchante Accessories	Albums, diaries, gift bags, journals, note pads, sketchbooks, storage boxes (Worldwide)	
	Raz Imports	Clocks, ornaments, trays (Worldwide)	
	Thirstystone Resources	Stone coasters (U.S., Canada)	
Tokidoki	Aurora World	Plush (Worldwide)	tokidoki
Tom Kerridge	Great British Exchange (The, GBE)	Ceramics, cookware, knives, textiles, wood (U.K.)	Talisman Licensing U.K.
Top Gear	Dreamtex	Bedding (U.K.)	BBC Worldwide
Tottenham Hotspur	SJ Trend Co. Ltd.	Apparel (South Korea)	Infiniss Co. Ltd.
Trolls	Scentco	Scented flash drives, scented key chains, scented markers, scented pencil buddies, scented pencils, scented pens (North America)	DreamWorks Animation
Vamps (The)	Stuff4/W3tech dba MaxRam	Mobile phone cases (Worldwide)	BandMerch/Topspin Media
Who (The)	Absolute Garments	Fashion tops (women's; Worldwide)	
	Fipo Group	Apparel (U.K.)	
	Licensing Essentials	Headwear, t-shirts (Australia)	
Yo-Kai Watch	Kinnerton Confectionery	Advent calendars, chocolate lollipops, Easter eggs, mealtime products (U.K.)	Bulldog Licensing



## contacts & connections

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

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## Licensed Properties Play at E3

Continued from page 1

*Fantasy XV VR* (also not a whole game) for PlayStation VR; *Star Trek: Bridge Crew* for PlayStation VR, HTC Vive and Oculus Rift; and *Fallout 4* for HTC Vive.

Other licensed properties in the spotlight at E3:

- ▶ The Legend of Zelda—Nintendo's *Legend of Zelda: Breath of the Wild*, which is due in 2017 for both Wii U and Nintendo's new NX platform was described by many as the biggest title of E3, with critics applauding the game because it looks and plays unlike previous Zelda games—changes that are seen as necessary to introduce the series to new players.
- ▶ Sklyanders—Activision Blizzard pioneered the so-called toys-to-life market with *Skylanders* in 2011. Now it's taking the franchise to TV with *Skylanders Academy*, which will debut on Netflix this fall. Netflix has taken two seasons of the show, which is the first production from the game company's Activision Blizzard Studios launched last year to create original content based on games.
- ▶ Star Wars—Electronic Arts brought lots of enthusiasm for Star Wars games, but few details to E3. What's clear is that the pace of new game rollouts will keep up, or close to it, with Disney/Lucasfilm's plans for one franchise film a year for the foreseeable future.

## Planned Video Game Releases With Licensing Potential, 2016–2018

GAME	PLANNED RELEASE	PUBLISHER	SUMMARY	SEQUEL	REBOOT	NEW IP	LICENSED	GRAPHICAL UPDATE
Deus Ex Mankind Divided	8.23.2016	Square Enix	Cyberpunk themed sequel to 2011's Deus Ex: Human Revolution	X				
Madden NFL 17	8.23.2016	EA Sports	New Turning Points challenge drops players into hundreds of different scenarios from last year's NFL season.	X				
ReCore	9.13.2016	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		
NBA 2K17 Early Tip-off Edition	9.16.2016	2K Games	The Indiana Pacers' Paul George graces the cover art, with retired Laker Kobe Bryant fronting the Legend Edition.	X				
Dragon Quest VII: Fragments of the Forgotten Past	9.16.2016	Nintendo	Rebuilt visuals and a complete retelling of the classic Dragon Quest story for 3DS.	X				X
FIFA 17	9.27.2016	EA Sports	New "The Journey" mode allows players to make decisions on and off the pitch.	X				
Final Fantasy XV	9.30.2016	Square Enix	Said to be more action oriented than other games in the series.	X				
Yo-Kai Watch 2: Bony Spirits and Fleshy Souls	9.30.2016	Nintendo	Features 350 new and returning Yo-kai.	X				
Paper Mario: Color Splash	10.7.2016	Nintendo	Mario restores the drained color of Prism Island with his Paint Hammer and Battle Cards.	X				
Mafia III	10.7.2016	2K Games	Players choose their own play-style: brute force, blazing guns or stalk-and-kill tactics, to tear down the Italian Mafia.	X				
Batman Arkham VR	10.16.2016	Warner Bros. Interactive	A new Caped Crusader story, told in VR.	X				X
Battlefield 1	10.21.2016	Electronic Arts	New installment in the first-person shooter series born in 2002.	X				
Just Dance 2017	10.25.2016	Ubisoft	New songs include Sorry, Daddy, Cheap Thrills, Lean On and Worth It.	X				
The Last Guardian	10.25.2016	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		
World of Final Fantasy	10.25.2016	Square Enix	Brand new game with cutesy versions of classic Final Fantasy characters.	X		X		
The Elder Scrolls V: Skyrim	10.28.2016	Bethesda	The PC game moves to PS 4.					X
Titanfall 2	10.28.2016	Electronic Arts	Sequel to 2014's first-person shooter.	X				
Call of Duty: Infinite Warfare	11.4.2016	Activision	Returns to the roots of the franchise where cinematic, immersive storytelling reveal large-scale war and epic battles.	X				
Mario Party Star Rush	11.4.2016	Nintendo	Call of Duty: Infinite Warfare delivers something for every Call of Duty fan with three unique game modes: Campaign, Multiplayer, and Zombies.	X				
Dishonored 2	11.11. 2016	Bethesda	Sequel to 2012's Dishonored.	X				
Gears of War 4	11.11. 2016	Microsoft	Next chapter in the best-selling sci-fi series.	X				
Watch Dogs 2	11.15.2016	Ubisoft	Gamers play as hackers.	X				
Pokemon Sun and Moon	11.18.2016	Nintendo	Sun and Moon represent the seventh installment in the Pokemon series; featuring all new Pokemon on the tropical islands of the Alola region!					
South Park: The Fractured but Whole	12.6.2016	Ubisoft	Trey Parker and Matt Stone's sequel to 2014's South Park: The Stick of Truth.	X				

Continued on page 18

## Planned Video Game Releases With Licensing Potential, 2016–2018 Continued from page 17

GAME	PLANNED RELEASE	PUBLISHER	SUMMARY	SEQUEL	REBOOT	NEW IP	LICENSED	GRAPHICAL UPDATE
Crackdown 3	12.30.2016	Microsoft	Reimagining of 2007's open-world superhero crime game, created by Lemmings/Grand Theft Auto creator David Jones.		X			
Final Fantasy VII: Remake	12.30.2016	Square Enix	Long anticipated HD remake of the 1997 game.		X			X
Dead Island 2	12.30.2016	Deep Silver	San Francisco-set zombie game sequel from the creators of Spec Ops: The Line.	X				
WWE 2K17	12.31.2016	2K Games	Features the return of semi-retired wrestling star Goldberg in two playable versions.	X				
Runbow Pocket	Q4 2016	Nintendo	Ports the colorful Runbow fun from Wii over to 3DS.		X			
Star Trek: Bridge Crew	Q4 2016	Ubisoft	VR game in which players explore space as a member of the Federation; for PlayStation VR, HTC Vive and Oculus Rift.				X	
Steep	Q4 2016	Ubisoft	Action sports game set in the Alps.			X		
Resident Evil 7: Biohazard	1.24.2017	Capcom	Critics at E3 applauded the game's foreboding sense of horror; will be playably on PlayStation VR.	X				
For Honor	2.14.2017	Ubisoft	Melee action game in which players can enter the action as bold Knight, brutal Viking or deadly Samurai.			X		
Horizon: Zero Dawn	2.28.2017	Sony	Action role-playing game set after the fall of civilization, from the creators of the Killzone franchise.			X		
Tom Clancy's Ghost Recon: Wildlands	3.7.2017	Ubisoft	Globetrotting installment in the Ghost Recon shooter series.	X			X	
Mass Effect: Andromeda	3.31.2017	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				
Days Gone	12.29.17	Sony	Set in a post-apocalyptic Pacific Northwest.					
God of War	12.29.2017	Sony	Kratos is now a father and living in seclusion in the land of Norse mythology.		X			
Sea of Thieves	12.29.2017	Microsoft	Developer Rare (Banjo Kazooie, Battletoads) is creating this pirate adventure game.			X		
Spider-Man	12.29.2017	Insomniac	Insomniac and Marvel teamed for this superhero game not tied to any movie.				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				
Crash Bandicoot remasters	TBA 2017	Activision	Crash 1, Crash 2 and Crash Warped remastered for PS4.					X
Fallout 4 VR	TBA 2017	Bethesda	The 2015 open-world game ported over to VR for HTC Vive.					X
The Legend of Zelda: Breath of the Wild	TBA 2017	Nintendo	Upcoming installment in longstanding action/role playing franchise starring Link. Series licensees include Fifth Sun (apparel) and Dark Horse Comics (statues).		X			
Ever Oasis	TBA 2017	Nintendo	New RPG IP set in a world inspired by Egyptian culture and mythology.			X		
Star Wars Battlefront sequel	TBA 2017	Electronic Arts	Motive Studios is developing the "next installment" in the SW Battlefront series.	X			X	
Untitled Star Wars game from Visceral	TBA 2018	Electronic Arts	Developer Visceral Games is working on a Star Wars game based on "original narrative with new characters."				X	
Fe	TBA	Electronic Arts	EA calls this game from new division EA Originals a "a personal narrative about our relationship with nature, the land, and its beings."			X		
Phantom Dust Remaster	TBA	Microsoft	Action/strategy game and remake of the 2004 title of the same name for the Xbox One.		X			
Dreams	TBA	Sony	From the developer of LittleBigPlanet, this game lets players "piece together a whole environment in moments" to explore one another's dreams.			X		
Untitled Star Wars game from Respawn	TBA	Electronic Arts	Titanfall developer Respawn Entertainment is working on a third party action adventure set in "a different Star Wars era."				X	

SOURCE: THE LICENSING LETTER

### RETAIL

## E-commerce Sales Top \$11 Billion in 2015; Led by Trademarks and Entertainment

Over \$11 billion in licensed merchandise was sold through e-commerce retail channels in the U.S. and Canada in 2015, according to *The Licensing Letter's Annual Licensing Business Survey*.

Factoring out automobiles and fuel, the U.S. Commerce Department estimates that 10.5% of all U.S. retail sales in 2015 were made online. In contrast, *TLL* estimates that e-commerce comprised 11.4% of licensed sales. This figure includes sales through online-exclusive retailers like Amazon.com, Café Press and Zappos; traditional brick-and-mortar retailers with e-commerce sites such as Target, Walmart and Sephora; and smaller branded websites run by e-commerce service providers.

Although e-commerce ranks as only the 5th largest retail channel overall, it is the fastest growing retail channel. As shelf space in brick-and-mortar stores shrinks and the TV shopping and mail order channels have declined, brands increasingly finding success online. Over the last couple of years, an agent notes, "brands that have never gotten into licensing before now are doing so because e-commerce."

The biggest barriers for brands, according to *Survey* respondents, are the technical problems posed with building engaging e-commerce sites, including mobile support. Several agents and licensees were enthusiastic about partnering with Amazon.com, citing affordability, ease of use, Google AdWords support and access to data-mining tools.

### RETAIL SALES OF LICENSED MERCHANDISE THROUGH E-COMMERCE CHANNEL, BY PROPERTY TYPE, U.S./CANADA, 2015

PROPERTY TYPE	E-COMMERCE SALES	SHARE OF TOTAL E-COMMERCE SALES	OVERALL RETAIL SALES	SHARE OF E-COMMERCE SALES FOR PROPERTY TYPE	RANK FOR PROPERTY TYPE
Trademarks/ Brands	\$1,908	16.2%	\$27,645	6.9%	6
Entertainment/ Character	\$1,889	16.0%	\$11,878	15.9%	3
Fashion	\$1,654	14.1%	\$20,942	7.9%	4
Sports	\$1,626	13.8%	\$14,786	11.0%	3
Art	\$657	5.6%	\$5,665	11.6%	4
<b>Total*</b>	<b>\$11,773</b>	<b>100.0%</b>	<b>\$103,276</b>	<b>11.4%</b>	<b>5</b>

SOURCE: THE LICENSING LETTER

### E-commerce Sales by Product Category

The *Survey* breaks out retail sales by distribution channel for five major property types; trademark/brand, entertainment/character, fashion, sports and art. While no one property type depends on e-commerce exclusively for retail sales, entertainment/character (15.6% of retail sales through e-commerce) and art (11.6%) have an above-average share of merchandise sold online.

By sheer dollar value, more licensed trademark/brand merchandise is sold online than from any other property type (\$1,908 million), despite the fact that e-commerce sales rank sixth amongst retail channels for the property type.

### Amazon.com Leads E-commerce Growth in CPG

Amazon accounted for 26.1% of all U.S. e-commerce sales in 2015, according to Internet Retailer estimates. And 1010data claims that the giant's Subscribe and Save

feature is single-handedly responsible for over 20% of the growth in consumer packaged goods (CPG; includes health and beauty, food and beverage and other categories with low margin, high volume on-durable goods).

While sales of CPG grew 42% in 2015, outpacing the growth of total e-commerce's 30% increase, 1010data says that the actual starting dollar figures are low—less than 10% of e-commerce sales are for CPG.

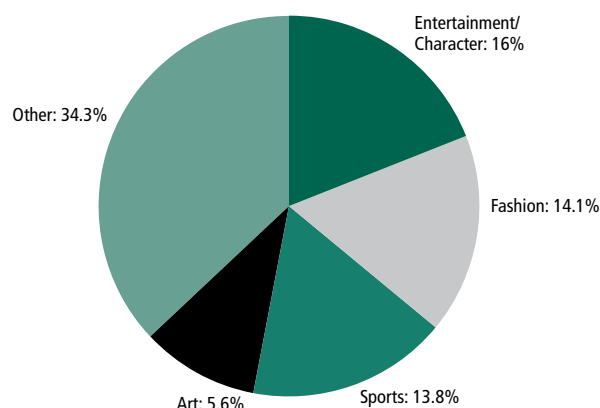
The biggest category within CPG is pet food, which grew 55% in 2015 to \$760 million in U.S. e-commerce sales, according to 1010data. Facial moisturizers came in second with \$450 million in e-commerce sales (up 25% over 2014), and fragrances third with \$330 million in revenue (11% higher than 2014). The fastest-growing brand among those with more than \$5 million in annual sales was Amazon's own line, Amazon Elements.

### New Breed of Shopper: Mobile-only

A Google study with Ipsos showed that 82% of shoppers consult their phones on purchases they're about to make in a store. Sports and fashion brands have been especially keen on building connected shopping experiences, where consumers can seamlessly move from researching on mobile to fulfilling purchases in brick-and-mortar locations. Most e-commerce studies do not include these sales in e-commerce retail studies, but Google data suggests that the greatest growth areas for this strategy are for local stores.

There is a new breed of consumer in strictly cyber commerce; comScore estimates that 11% of online shoppers buy exclusively through mobile, outnumbering desktop-only shoppers who make up 10%. Most (80%) shoppers use both mobile and desktop in their shopping experiences. Looking forward, Forrester Research estimates that mobile will make up 54% of all e-commerce sales in 2018.

### RETAIL SALES OF LICENSED MERCHANDISE THROUGH E-COMMERCE CHANNEL, BY PROPERTY TYPE, U.S./CANADA, 2015



SOURCE: THE LICENSING LETTER

### TOP 10 CPG CATEGORIES BY GROWTH IN E-COMMERCE SALES, U.S., 2015

RANK	CPG CATEGORY	PRODUCT CATEGORY	YEARLY GROWTH
1	Laundry Detergent	Domestics	85%
2	Toothpaste	Health & Beauty	75%
3	Health Snack Bars	Food & Beverage	74%
4	Deodorant	Health & Beauty	71%
5	Adult Nutrition	Health & Beauty	68%
5	Baby Wipes	Infant	68%
6	Protein Powder	Health & Beauty	66%
7	Bottled Water	Food & Beverage	63%
8	Mouth Wash	Health & Beauty	63%
9	Baby Diapers	Infant	61%
10	Beauty Primer	Health & Beauty	60%

SOURCE: 1010Data, THE LICENSING LETTER

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## CANNABIS

### Licensed Cannabis the Next Big Thing

This year's Cannabis World Congress & Business Exposition New York (CWCBEpo NY) welcomed a disparate crowd as businesses sought to stake a claim in an industry estimated to be worth \$5.7 billion in the U.S. in 2015, according to ArcView Market Research and New Frontier. While TLL estimates place retail sales of licensed legal cannabis at less than 1% of all industry sales, the immaturity of the business means branding is underdeveloped. The greater market grew 24% from 2014 (\$4.6 billion) and is expected to grow another 26% to \$7.1 billion in 2016—and licensed goods are expected to grow at a much faster rate, especially as legalization expands.

Retail sales of licensed (as in, branded) cannabis products total \$60-100 million dollars in the U.S., according to TLL estimates. In effect, licensed sales make up less than 1% of all retail sales of legal cannabis. These products include concentrates, infused edibles, flowers as well as patches, soft gels, food and beverages—in addition to related accessories such as vape pens, pipes, grinders and tins. Sales figures are notoriously difficult to pin down for branded goods, as many deals are co-branded, function as marketing partnerships or operate in an essentially legal gray zone.

Cannabis licensing is an entirely different beast than any other product category. Deals with products containing above 0.3% THC must be done state-by-state due to federal prohibitions. The same prohibitions mean that royalty fees cannot be collected on licensed sales. Instead, most contracts provide for a flat fee per sale to be paid to the licensor. And thanks to varying packaging, labeling and other assorted regulations contracts and products should vary for every state. Each state's tax laws can also affect pricing structure; mark-ups can vary anywhere between 100-300% for essentially identical products.

The marketplace is far from a stable, solid profit center—and the state-by-state restrictions for legal marijuana mean that brands will have difficulty breaking into the space on a grand scale. The lack of interstate distribution also means that there is little to no standardization of products, and licensed lines will usually partner with one major source per state.

Today's cannabis brands are largely regional; there are only two major brands that can be said to command nationwide recognition, High

### KNOW YOUR PRODUCT

Cannabis product can be divided into three major "types":

**THC** is the primary psychoactive ingredient in marijuana and the most well-known cannabinoid. Cannabis strains with more than .3 percent of THC are legally regulated.

**CBD** or cannabidiol, which is sold as an extract or purification in health and beauty aids such as pills as well as food and beverages. The ingredient is espoused for its health and wellness applications thanks to its anti-inflammatory, analgesic and seizure reduction properties. Cannabidiol is legal nation-wide.

Industrial **hemp**, the non-psychoactive strain of cannabis, is used for food and fiber production. Compared to strains grown for recreational usage, hemp has low concentrations of THC and higher concentrations of CBD. Some companies refer to their products as hemp rather than CBD.

Times and NORML. The strategy behind regional brands tends to be to expand to neighboring states as legalization expands. The upside to licensed brands is that this issue can be avoided altogether.

The first brands to expand into licensed cannabis are music artists such as Bob Marley and family, Willie Nelson and Snoop Dog. Robert Hunt, Partner at Tuatara Capital, believes that the future lies beyond those celebrities who are part of the "stoner culture." The next big influx of branded merchandise is likely to be celebrity chefs, who use cannabis regularly in cooking edibles (See TLL's chart of celebrities that have lent their names to a marijuana brand in June 2016). And although many sports athletes have shown support for the industry, none as of yet have thrown their names to a branded line. The problem so far, Hunt says, is that brands are unprepared to handle the legal issues and consumer research necessary to break into the market.

The perception is clear: legalization will happen. Businesses are focused on planting the seeds for expansion, and the crux lies with brands now in identifying those that will be best positioned to exploit the future market. This year is a watershed moment for the industry; seven states will be voting to allow adult recreational use, including California, Nevada, Arizona Massachusetts, Maine, Rhode Island and Vermont.



## Shedding the Stoner Image

Growers and distributors new to the business are often struggling with weeding through legal regulations and securing funds (businesses cannot deduct operating expenses or use traditional banking). Most are new to branding and marketing. That is not to say that some companies do not; and in fact, they were the highlight of the show.

The overall focus over the three days was a bid for the industry to shed the stoner image. CWCBE expo NY was rich with educational non-profits and political candidates as well as women's and consumer advocacy groups intent on normalizing the culture. A large part of that mission involves adjusting the branding of the entire industry, according to David Paleschuck, President of New Leaf Licensing and VP Licensing & Brand Partnerships at Dope Magazine. Instead of "marijuana," or "weed," which have negative connotations and imply the presence of THC, the term "cannabis" is used. Instead of "smoking," the more accurate "consumption" reflects changing consumer habits. Emphasis in marketing is placed on safety, testing and clear labeling.

Over half of cannabis sales are for non-smoke products, and businesses throughout the show stated that their most popular lines are edibles or processed cannabis to be used with vape pens and other discrete, often odorless systems. One company provided a unique twist to an age-old method: CannaKorp showcased a Keurig-like single-use, pod based cannabis vaporizer system. To be released later this year, the company will partner with selected cultivators to provide an array of cannabis brands for each state, with both THC and CBD strains. The sale of each pod brings in \$1 in fees.

And most activity at the show was focused on CBD, which is used in everything from body lotion to gel caps to soda.

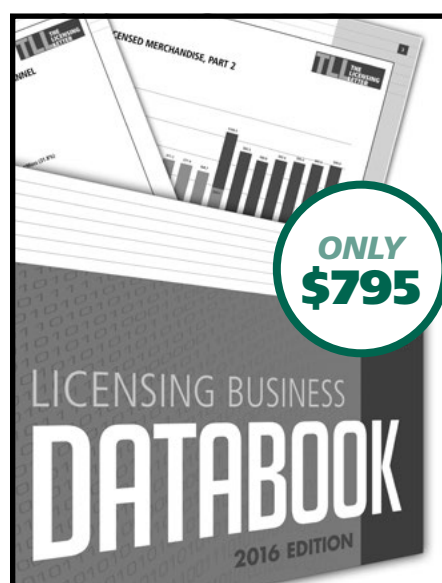
## Who's Using?

The largest hurdle for the industry is identifying the cannabis consumer; their lifestyle, aspirations and the type of brand imagery that will speak to them.

The largest markets are Colorado, California and Washington. See TLL's LAWSCAPE map depicting the legal status of marijuana in all 50 states (June 2016). Each state will have different target audiences, depending in part on whether state law allows for recreational use. In California, for example, the fastest growing consumer group is Boomers 55+ years-old, due to educational outreach efforts, and young men aged 21-34 who are considered 'heavy users' (consuming cannabis several times a week). They make up 51% of purchases. Nationwide, 40% of legal cannabis consumers are aged 25 to 34 years old, 21% are 18 to 24 years old and 15% are 35 to 44 years old, according to Leafbuyer.com. And only 55% of buyers are male.

According to the Brightfield Group, over a third of American consumers would pay more for organic or premium strains. More than the typical consumer, quality and safety are important to cannabis buyers. Branded products that emphasize luxury as well as convenience are essential in fulfilling this need.

Keith Stroup, Founder, Legal Counsel & Director of NORML (National Organization for the Reform of Marijuana Laws) identifies several issues that must be addressed to normalize cannabis and encourage business activity. While consumers seek safety and convenience, there are no established testing and labeling standards that each producer must adhere to. Another hurdle to surpass is eliminating punitive (and often scientifically unsound) testing for THC in workplaces, on the road and in homes. NORML provides its service mark for brands that have met its standards.



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## RETAIL ROUNDUP

## Earnings Scorecard: Winners &amp; Losers of the First Quarter

The nation's largest retailers posted their earnings for the first quarter of 2016. And the numbers confirm what we already know: These are tough times for the retail industry.

## BIGGEST LOSERS BY RETAIL SALES, 1Q 2016

COMPANY	LOWLIGHT OF 1Q PERFORMANCE*
Macy's	Sales fall from \$6.23 billion to \$5.77 billion, biggest decline since recessionary 2009
Gap Inc.	Sales drop 6% to \$3.44 billion, earnings drop from 56¢ to 32¢ per share—both figures in line with expectations
Kohl's	After five up quarters in a row, the comeback died with sales falling 3.7% to \$3.972 billion
Target	Sales of \$16.20 billion below \$16.32 billion forecasted by analysts and way below last year's \$17.12 billion first quarter
Sears	Net losses rise from \$303 to \$471 million, net sales drop from \$5.88 billion to \$5.39 billion
JC Penney	Instead of projected 38¢ per share losses on sales of \$2.92 billion, lose 32¢ per share on sales of \$2.81 billion—down 1.6% from last year's 1Q sales of \$2.86 billion
Nordstrom	Sales of \$3.249 billion is up 2.5% but below \$3.293 billion projected; meanwhile, earnings down from 66¢ to 26¢ per share
Genesco Inc.	Sales drop 2% to \$649 million (vs. \$661 million) in part due to divesting of Lids Team Sports
Ross Stores	\$3.09 billion in sales is 5% above last year but below \$3.12 billion projected; same-store sales increase of 2% is below 2.5% projected
Dillard's Inc.	Sales decline 4.6% and earnings fall 18.4% from \$2.57 to \$2.17 per share
Neiman Marcus	Sales fall 2.3% from \$1.52 billion to \$1.49 billion
J. Crew	Sales decline 3% to \$567.5 million and same-store sales decline 7%
Abercrombie & Fitch	Sales of \$685.5 million below \$709 million expected; earnings per share of 59¢ below 67¢ expected
Lumber Liquidators	Sales fall 10.2% to \$233.5 million
Express, Inc.	Flat sales of \$502.9 million (vs. \$502.4 million in 1Q last year)
Gordmans Stores	Sales drop 2.6% from \$145.9 million to \$142.2 million
Chico's	Sales of \$643 million below the \$668.9 million projected; earnings of 25¢ per share below the 31¢ projected
Claire's Stores	Sales of \$299.6 million down 6.4% (\$20.3 million) driven by 5.1% decrease in North America same-store sales
GameStop	Global sales down 4.3% to \$1.97 billion—but performance is in line with expectations
Best-Buy	Sales down for third straight quarter, from \$8.56 to \$8.44 billion—but the 1.3% loss was less than expected
Bon-Ton Stores	Sales decline higher than expected 3.3% to \$591 million fueled by 2.9% decline in comparable stores sales
Kirkland's	Sales grow 9.8% to \$129.9 million but not enough—instead of the 10¢ projected, earnings reached only 6¢ per share
Tilly's Inc.	Sales flat at \$120 million; comparable store sales decline 4.1%
DSW	Sales up 3.9% to \$681.3 million but below \$698.8 million projected; earnings per share of 40¢ projected below 45¢ per share projected
Tiffany & Co.	Sales surprisingly fall 7% to \$891.3 million with comparable store sales declining 9%

Note: Unless indicated otherwise, comparisons are year-over-year.

SOURCE: THE LICENSING LETTER

But just how tough are they?

While the monster losses by Macy's, Target, Kohl's, Nordstrom and others stole the headlines, they belie the strong performance posted by other parts of the industry. The success came from not just e-commerce giant Amazon.com, but traditional brick and mortar operations like Walmart, TJX and Dollar Stores.

In case you didn't gather up and synthesize all of the earnings results, you can eyeball the charts below to keep track of the first quarter's retail winners and losers.

## BIGGEST WINNERS BY RETAIL SALES, 1Q 2016

COMPANY	HIGHLIGHT OF 1Q PERFORMANCE*
Amazon.com	28% increase in sales to \$29.1 billion easily beats analysts' expectations of \$27.98 billion
TJX	Sales grow 10% to \$7.5 billion with comparable stores sales growing 7%
Walmart	Revenue grows from \$114.83 billion to \$115.9 billion and earnings reach 98¢ per share, both figures exceeding projections
Dollar Stores	Dollar Tree sales up 133% from \$2.18 billion to \$5.09 billion—89¢ EPS beats projected 81¢; Dollar General sales up 7% from \$4.92 to \$5.28 billion
L Brands	Sales rise from \$2.51 billion to \$2.61 billion and EPS reaches 59¢, both in line with expectations
Home Depot	Sales jump 9% to \$22.8 fueled by 6.5% growth in comparable store sales (7.4% increase in US)
Lowes	Revenues of \$15.2 billion (vs. \$14.13 billion in 1Q last year) and above \$14.87 billion projected; earnings also exceed expectations—87¢ vs. 85¢ per share
Ace Hardware	Record 1Q revenues of \$1.2 billion, up 4.3%; net income of \$26.1 million is \$3.8 million below last year but 12% ahead of plan
Big Lots	Sales up 2.5% to \$1.31 billion projected; EPS of 79¢ instead of 70¢ projected
Staples	Instead of the \$2.62 billion projected, revenues came in at \$2.61 billion; and instead of the 55¢ per share expected, earnings came in at 59¢ per share
DICK'S Sporting Goods	Net sales increase 6.1% to \$1.7 billion
Foot Locker	Sales increase 3.7% with comparable store sales increasing 2.9%; EPS up 7.8% to \$1.39—25th consecutive quarter in which both sales and profits rose
Fred's, Inc.	Sales up 8% to \$549.55 million
Urban Outfitters	Instead of the projected 0.5% decline, existing store sales rose 1%; revenues up 3% to \$762.2 million, beating Wall Street projections of \$759.4 million
American Eagle Outfitters	Total sales up 7%, comparable store sales up 6%; EPS increases 47% to 22¢ per share
Ulta Salon, Cosmetics and Fragrance, Inc.	Sales increase from \$868.1 million to \$1.073 billion; instead of the \$1.29 projected, EPS was \$1.45 per share
Williams-Sonoma	Sales grow 6.5% to \$1.098 billion driven by higher comparable brand revenues; EPS of 53¢ beats projected 50¢

Note: Unless indicated otherwise, comparisons are year-over-year.

SOURCE: THE LICENSING LETTER

## CELEBRITIES

## Rihanna Shows Strength for Puma, Foot Locker

In the competitive world of licensed athletic gear, pop singer and fashion icon Rihanna is riding the demand for athleisure apparel to go toe-to-toe with some of the biggest athletes in the NBA.

Athletic retailer Foot Locker in May posted its highest quarterly net income (\$191 million, up 3.8%) and earnings per share (\$1.39) in the company's history, but investors were surprised when comparable store sales increases of 2.9% failed to meet analysts' expectations of 4%, a fact that execs blamed on mid-single-digit declines in the of signature basketball shoes. What that means: Nike's big LeBron James and Kevin Durant brands failed to sell.

What did perform well for Foot Locker was women's fashion, led by the classic Stan Smith sneaker from Adidas and Rihanna's shoes and apparel from Puma.

Puma's full-year 2015 sales increased 14% and its first quarter 2016 sales climbed 3.7%, in part because of its affiliation with Rihanna. "One highlight for Puma in the first quarter was the Fenty Puma by Rihanna fashion show at New York Fashion Week in February. A series of style for the female consumer have been launched successfully, both in collaboration with Rihanna as well as in our inline collection. Key footwear styles such as Creeper and Fenty trainer sold out within weeks or days," per Puma's first quarterly earnings report.

In May Puma announced that three new styles will be added to the Fenty Puma by Rihanna Creeper collection on May 26, including two premium suede versions of the casual kicks. The company might hope for a little less enthusiastic response than the one that greeted Rihanna's limited edition collaboration with fashion designer Manolo Blahnik earlier this month: When only 400 pairs were stocked in each of Blahnik's London, New York and Hong Kong outlets, a dedicated microsite crashed several times as it was overwhelmed by fans trying to place special orders online.

It's no wonder research firm The NPD Group in January anointed Rihanna the most marketable of all big-name celebrities, based on the singer having more than three times as many strong brand endorsement opportunities as the average big-name celebrity. Her other licensing deals include a dressing table full of scents from Parlux Fragrances.

## E-COMMERCE

## How Do Millennials Use Their Mobile Devices to Shop?

Almost all of this year's *TLL Annual Licensing Business Survey* respondents used two "M" words, often in the same sentence, when talking about key long-term trends in licensing and retail. And while they said it in different ways, they all made basically the same points:

- ▶ **Millennials** are the socio-economic group currently wielding the most influence over retail; and
- ▶ **Mobile** technology is the mechanism they're using to wield that influence.

So what does it all mean? What exactly are millennials doing with mobile technology? And how are these uses different from the way other generations are using mobile technology to shop?

A new study examining the shopping behaviors of millennials offers some clues to these questions. The study from retail research firm MobiLens lists the most common shopping-related uses of mobile devices by millennials in Germany and compares them to the frequency "Silver Surfers" engage in those particular uses:

### USE OF MOBILE DEVICE FOR SHOPPING, MILLENNIALS VS. SILVER SURFERS

USE OF MOBILE DEVICE FOR SHOPPING	MILLENNIALS*	SILVER SURFERS†
Took a picture of product	23.8%	18.3%
Sent picture of product to family/friends	18.0%	10.4%
Texted or called family/friends about product	14.7%	10.2%
Compared product prices	13.9%	6.0%
Scanned bar code of product	13.2%	11.6%
Researched product features	11.2%	3.4%
Found store location	8.5%	4.1%
Found coupons or deals	7.3%	3.0%
Checked product availability	3.6%	1.8%

Notes: \*Born between 1980 and 2000. †Over 55 years old.

SOURCE: comScore MobiLens, THE LICENSING LETTER



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## Who's News

Beanstalk launches its Icon Representation service for the representation of personality rights of legendary icons to be led by **Martin Cribbs**, who joins as VP Brand Management.

**Rosalind Nowicki** steps down as EVP Global Sales & Retail at 20th Century Fox to lead Iconix's entertainment division and Peanuts Worldwide.

Zodiak Kids promotes **Gwen Hughes** to COO Zodiak Kids Studios for the U.K. and France.

Spin Master hires **Anna Hewitt** as its new Licensing Director Europe.

Broad Street Licensing Group promotes **Peter Cross** to Brand Manager.

**Jim Procter-Blain** is promoted as Head Marketing & Licensing of Simba Smoby U.K.

Newell Brands hires **Fiona Laird** as EVP & Chief Human Resources/Communications Officer.

**Dean Greasley** is now Head Licensing at TDP Textiles.

Perry Ellis Intl. appoints **David Enright** as COO.

**Kindle Entertainment** names Lindsay Watson Head Animation.

**Ron Sargent**, the CEO of Staples, will be succeeded by **Shira Goodman**, now the President North America, who will become interim CEO.

Target appoints **Mark Tritton** as EVP & Chief Merchandising Officer.

**Jeffrey Conrad** forms a new children's publishing company, Peeko Press, with **Brandon Henderson**. Conrad is Co-founder Storyteller while Henderson is Co-founder & Publisher. **Matt Gildea** is President.

Animation studio TeamTO hires **Shu Ye** as GM to head its new office in Beijing, China.

Timbuk2 hires **Jen Larkin** as Design Director, **Nelson Garcia** as Art Director, **Azul Couzens** as Head Marketing and **Ami Takahashi** as Head Intl. Sales.

**Tim Coppens** joins Under Armour as Executive Creative Director of Under Armour Sportswear, a new premium line.

Serta Simmons Bedding appoints **Daren Couture** EVP Operations.

DSW's SVP & CFO **Mary Meixelsperger** resigns.

The Founder & MD of Paul Lamond Games, **Richard Pain**, has passed away.

## Sports Shorts

### TOPPS TOSSES CELEBRITIES INTO MLB CARD MIX

In addition to over 350 players, the newly released 2016 Topps Baseball Series 2 collection features insert sets commemorating noteworthy individuals who threw out a first pitch before a MLB game in 2015, including Bush #41, Tim McGraw, Jimmy Kimmel and Jim Harbaugh. The Topps Company is locked in as exclusive MLB trading card licensee through 2020.

### TOPPS CUTS DIGITAL TRADING CARD DEAL WITH NFL

Topps was able to keep its 60-year relationship with the NFL alive by making a long-term agreement with the league and NFLPA for digital trading cards. The deal allows Topps to publish digital versions of its Topps Chrome, Topps Inception and other brands in its mobile app. Panini became the NFL and NFLPA's exclusive non-digital trading card licensee in 2016 and has non-exclusive digital card rights with the league and players.

### ADIDAS AND GERMAN NATIONAL TEAM INK WORLD'S RICHEST SOCCER DEAL

Adidas has agreed to pay €50 million (\$56.7 million) per year to extend its sponsorship of World Cup soccer champions Germany through 2022. The deal is double the value of the previous agreement and above the €43 million per year that Nike pays to sponsor the French national team. Nike also reportedly bid for the Germany contract.

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