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THE LICENSING LETTER

THE DEFINITIVE SOURCE FOR DATA, ANALYSIS, NEWS AND CONTACTS SINCE 1977

Inside This Issue

Licensing Ledger ... 2
The Language of Licensing ... 5
Licensing News ... 8
Contacts & Connections ... 14
Star Wars Blasts Toy Industry Growth to Century High ... 19
U.S. & Canada Lead Per Capita Consumption ... 21
Off-price Channel Continues to Gain Ground Ceded by Department Stores ... 22
BRICs Falling: Tough Times in Emerging Markets ... 22
Pokémon, Rio2016 Merchandise Ride Summer Sales Waves ... 23
Pitfalls & Protections in Licensing Agreements ... 24
Cursed Child Blesses Retails ... 25
Summer or Not, Mattel and Hasbro Still Feeling Frozen ... 26
Who's News ... 27
With VR, Top Entertainment Properties Weave a Web Around Fans ... 28

Publishing Up 1% in the U.S./Canada; Steady Growth Worldwide

Retail sales of publishing-based licensed merchandise grew 1.0% to reach $4.51 billion in retail sales in the U.S./Canada—the highest since the category peaked in 2008 at $4.53 billion. Although 2015 growth is less than the previous year's (1.6%), the category is steadily recovering from the dip observed from 2008–2010 and laconic growth in subsequent years (under 1.0%). The trend is mirrored internationally, with worldwide sales of retail merchandise based on licensed publishing properties fairly flat over the past three years.

Like last year, books declined and newspapers/magazines grew in the U.S./Canada, albeit at a slower clip of 1.8% vs. 3.5% in 2014. The category's flat rates can be attributed to greater competition from entertainment/character brands and technological challenges—either as competition to traditional physical products or due to changing distribution, or both.

All segments of the publishing sector face mounting competition from higher-profile entertainment and digital properties. Publishing flourished in recessionary times when children's properties were deemed less risky. But when the entertainment/character sector began its recovery in 2013, publishing, especially for low-profile niche brands, began to struggle. The growing success of digital properties has also contributed to the depressed fortunes of the publishing sector.

Newspapers/Magazines

The growth in publishing was fueled by newspaper/magazines, which grew 1.8% to $2.76 billion in 2015 following four straight years of growth in the U.S./Canada. The segment is exemplified by lifestyle licensing programs built around magazine properties—more specifically, the efforts of publishers to use licensing to diversify and extend their brand into non-publishing product categories. Examples worldwide include:

- *Playboy* expanded its licensing presence in China under a new 10-year deal with Handong United providing for the manufacture and distribution of apparel, footwear, accessories and luggage.
- Hearst's *Cosmopolitan* partnered with Ecell Global for a line of phone and tablet cases to be distributed in the U.K. in a deal announced weeks before the world's first magazine-branded perfume, Cosmopolitan The Fragrance, hit shelves.

Continued on page 3

WORLD OF LICENSING

Ranking the World's Largest Licensing Markets

As in previous years, global licensing in 2015 was top-heavy with eight countries accounting for 87.5% of all retail sales, according to *TLL's Annual Licensing Business Survey*. The U.S. dominates the world rankings with over $93 billion in sales of licensed goods and 57.7% global share. Japan remains a distant second with sales of $10 billion and 6.2% share, followed by Canada, the U.K. and France. Sixth-ranked China is the only Asian country in the top 10. Germany, Italy, Brazil and Australia round out the top 10.

The top 10 rankings have not changed since 2013. But while the gap between the U.S. and number 2 Japan remains unbridgeable, margins separating other members of the big 10 are rapidly shrinking:

- China trails number 5 France by only $130 million in sales, a gap that is sure to be erased in 2016;
- Despite its sluggish performance in recent years, number 10 Australia needs only $104 million more to overtake fading Brazil for the ninth spot; and

Continued on page 20

Licensing Ledger

Following the announcement of NBA Stores in the Middle East, the **National Basketball Association** has taps Spanish restaurant group **AN Grup** to open the first NBA Café in Europe this fall. NBA Café Barcelona, the first of its kind in Europe, will feature NBA imagery, memorabilia and merchandise as well as a menu offering American bar and grill favorites, Mediterranean dishes and local options.

Private equity company **KKR** is considering a bid for **eOne** after the company rejected a takeover bid from **ITV**. The *Sunday Times* named other potential suitors as **ProSieben** and **Vivendi**, as well as the potential for ITV to increase its offer.

Walmart will buy **Jet.com** and its **Hayneedle** home furnishings subsidiary by yearend for approximately $3 billion in cash.

Coty has plans to divest or discontinue licensed lines representing 6-8% of its net revenue—a significant portion of these will be in the fragrance area. As part of Coty's deal to buy 41 **P&G beauty** brands in October, the company will take over **Hugo Boss** and **Gucci**, among other licenses, which it plans to hone its focus on.

Spin Master acquires **Swimways**, establishing itself as a key player in the outdoor and sports toys category with the $85 million purchase.

Boat Rocker Media acquires Canada-based animation company **Jam Filled Entertainment** to grow its family and kids content. Jam Filled's founding partners will retain their current titles and Jam Filled will continue to operate under its current brand.

Hancock Fabrics' intellectual property has been sold to crafts retailer **Michaels Stores** at $1.325 million.

Time Warner is now a 10% owner of **Hulu**, joining Disney, 21st Century Fox and Comcast. As part of the deal, Turner's networks, including TBS, TNT, CNN, Cartoon Network, Adult Swim, truTV, Boomerang and Turner Classic Movies, will be available live and on-demand on Hulu's new live streaming service.

Emerald Expositions has acquired The International Gift Exposition in the Smokies (IGES) from **M&M Gift Shows.**

G-III Apparel Group will buy **Donna Karan Intl.** from **LVMH Moët Hennessy Louis Vuitton** for $650 million. G-III will gain the Donna Karan and DKNY brands, which have had a "disappointing performance," over the last 7 months according to LVMH.

Hasbro acquires Irish animation studio **Boulder Media**, which currently produces animated series for Disney XD, BBC, Cartoon Network, Nickelodeon and more.

California-based **Grom Holdings**, whose teen social media network Grom Social counts three million registered members, acquires **Top Draw Animation**. TDA will allow Grom Social to produce animated content in-house.

Penguin Random House's film development unit, Random House Studio, is sold to **FremantleMedia North America**. FMNA plans to oversee all television adaptations developed from Random House Studio properties. China-based **Meridian Entertainment**, through a partnership with FMNA, will oversee film properties.

Wanda Cinema Line, a division of **Dalian Wanda Group**, China's largest theater chain owner and mall development company, will purchase **Mtime.com**, a Chinese online media outlet and ecommerce platform, for $350 million.

The LANG Companies has been acquired by **IG Design Group** and be a part of IG Design Group Americas.

Jazwares acquires the musical products business of **First Act**; the toy and consumer electronics company plans to accelerate new product development, expand existing licensor and retail relationships and leverage its global operations to increase First Act's international presence.

Global apparel manufacturer **Delta Galil Industries** acquires three brands from **VF Corp.**: 7 For All Mankind, Splendid and Ella Moss. The deal is expected to add over $300 million to Delta Galil's annual sales.

Dick's Sporting Goods purchases the **Sports Authority** brand name and other intellectual property with a $15 million bid. The deal includes SportsAuthority.com and 31 Sports Authority store leases (at an additional $8 million).

Brunico acquires Toronto-based **Achilles**, including operating rights to the Banff World Media Festival.

Women's magazine **Marie Claire** is entering the retail business with its very own High Street store. **Time Inc.**'s magazine is teaming up with online grocer **Ocado** to launch the new beauty store, which will open in London's Tottenham Court Walk.

Kellogg's first-ever permanent café has opened its doors in New York City. Kellogg's NYC will serve dishes featuring Kellogg's cereals combined with unique ingredients. Anthony Rudolf, Sandra Di Capua and Christina Tosi were on board to help develop the café's menu.

20th Century Fox will open a fleet of new The Simpsons stores across Asia. Following the successful launch of the first store of its kind in Taikooli Sanlitun in Beijing, the firm is extending its partnership with **HerChain Clothing Co.** to launch new shopping locations in Shanghai and Beijing.

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Publishing Up 1% in the U.S./Canada

Continued from page 1

- *Marie Claire*, the Time Inc. publication that has been licensing its brand for ready-to-wear, fashion accessories, cosmetics, and home décor around the world since 1982, announced its newest venture this year: beauty shops in the U.K.
- *National Geographic* has actively expanded the scope of its worldwide licensing program in terms of both geography and products range in the past two years.

Meanwhile, the number of magazines getting into licensing continues to grow. Notable newcomers include *Maxim* and the U.K. magazine *Men's Health*, which launched a line of vitamin products in 2015.

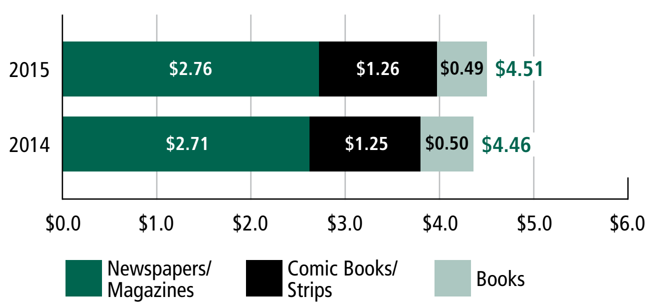
While in most cases, a magazine remains in publication and licensing is regarded as a source of supplemental revenues, there are companies that have taken the opposite approach. A leading example is the merger between Sequential Brands Group and Martha Stewart Living Omnipedia to create a new entity dedicated exclusively to consumer licensing.

Comic Books/Strips

Retail sales of comic books/strip-based merchandise grew 0.7% in 2015 to reach $1.26 billion in the U.S./Canada, marking the first year of growth since 2011. Although sales have not yet recovered to 2011 levels, the category has been steadily reviving with flat growth in 2014 (-0.5%) following a steeper dip in 2013 (-5.4%). Comics remain a steady source of revenue in the U.K., France, Belgium and other parts of Europe, and in much of Asia thanks in large part to Japan's dynamic manga publishing industry.

The bulk of licensing activity is in gifts and novelties (figures, key chains, collectibles), followed by accessories, apparel (t-shirts) and publishing (product extensions, posters). Despite the growing number of deals, the poor performance of these product categories has had a damping effect on retail sales.

RETAIL SALES OF LICENSED MERCHANDISE, 2014–2015 BASED ON PUBLISHING PROPERTIES, U.S & CANADA
(Figures in Billions)



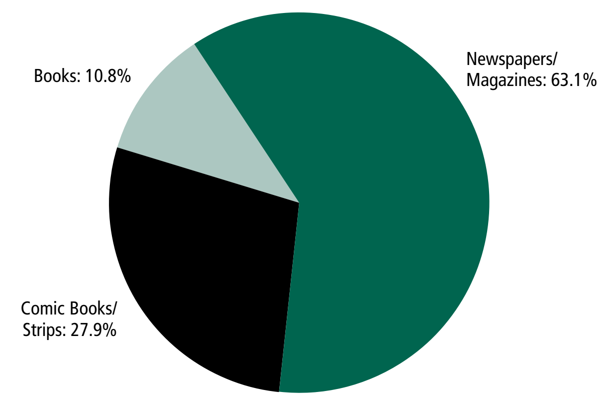
NOTE: Figures may not add up to 100% due to rounding.
SOURCE: The Licensing Letter, see Licensing Data Bank for historical data.

RETAIL SALES OF LICENSED MERCHANDISE, BASED ON PUBLISHING PROPERTIES, U.S & CANADA, 2014–2015
(Figures in Millions)

PROPERTY TYPE	RETAIL SALES, 2015	RETAIL SALES, 2014	CHANGE 2014-2015	SHARE OF MARKET, 2015
Newspapers/Magazines	$2,763	$2,714	1.8%	61.3%
Comic Books/Strips	$1,255	$1,247	0.7%	27.9%
Books	$487	$500	-2.5%	10.8%
Total Publishing	**$4,505**	**$4,460**	**1.0%**	**100.0%**

NOTE: Figures may not add up to 100% due to rounding.
SOURCE: The Licensing Letter

SHARE OF LICENSED MERCHANDISE, BASED ON PUBLISHING PROPERTIES, U.S & CANADA, 2015



SOURCE: The Licensing Letter

Comic strip properties that have transcended the world of newspapers, such as Peanuts and Garfield, are categorized under entertainment/character. In the same vein, although superhero properties have been on the rise, most licensing activity is focused on the film or TV adaptation rather than the print source. While increased interest in a print property adapted to the screen generally leads to amplified activity with the source material, publishers often struggle to capitalize. This trend is shifting in recent years as superhero franchises take off—instead of a one-off merchandising push necessarily centered around a single film, for example, licensors can plan waves of product lines timed to multiple releases and tie-ins with supplementary classic material.

There is also overlap in this category with traditional book authors, such as Margaret Atwood, Chuck Palahniuk, and William Gibson who have written or plan to write original comics projects.

Books

Like comic books/strips, sales of book-based licensed merchandise have been steadily declining—but the property type showed no similar sign of recovering in 2015.

Continued on page 4

Continued from page 3

Following a -3.1% drop in 2014, book-based licensed merchandise fell another -2.5% to reach $487 million in retail sales in 2015. This year marks the lowest total in six years, with books making up the smallest slice of the publishing property type (10.8% in 2015).

Licensing of books is dominated by children's titles and focuses on children's book characters. These properties have traditionally performed well in children's and infant product categories such as apparel, accessories and toys. However, there is stiff competition from entertainment/character, sports, high-end fashion and other brands that have expanded their licensing programs to appeal to fans who are entering a new life stage as young parents as well as private label brands that are distinguished by manufacture (such as made with organic/green materials) rather than design.

Properties with particularly aggressive programs include the World of Eric Carle, Roald Dahl, *Guess How Much I Love You*, *Rainbow Fish*, and *Geronimo Stilton*. And although they constitute a small percentage of the book market, licensing of adult book titles and authors continues to expand. Ken Follet (*Pillars of the Earth*), Kurt Vonnegut, Tom Clancy, Harlequin Romance, and Fifty Shades of Gray were among the adult book properties that launched new licensing ventures in 2015.

In some cases, licensing activity based on a publishing property may fall under entertainment/character since much of the licensing is based on the film properties. Examples include The Hunger Games, Twilight and Harry Potter (part of the Wizarding World franchise alongside *Cursed Child* and *Fantastic Beasts*, pg. 25).

Product Category

Worldwide sales of licensed publishing merchandise grew 2.1% in 2015 to reach $8.60 billion in licensed retail sales. U.S./Canada made up the bulk of sales (42.4% with $3.65 billion in sales for 2015) followed by Europe (26.1%) and Asia (27.7%).

Comic books and graphic novels as a product category have enjoyed greater growth because of the increasingly interdependent and complementary relationship between comics and movies and TV, especially for top entertainment/character properties. Retail sales of comics and graphic novels in the U.S. and Canada grew 10% in 2015, passing $1 billion for the first time in decades, according to comic book data specialist Comichron and online retail trade magazine ICv2.

Bookstores & Other Retailers

According to the U.S. Census Bureau, bookstore sales totaled $5.44 billion in the January to June 2016 span, up 6.1% from $5.13 billion a year ago. The bookstore sector performed better than the entire retail segment, with sales for all of retail rising 3.3% in June over the comparable month in 2015 and up 3.1% for the first half of 2016. This year marks the first time bookstore sales posted an annual gain since 2007. As well as their namesake, bookstores bulk up their profits with collectibles, gifts/novelties, calendars and greeting cards as well as food/beverages and consumer electronics.

Bookstores aren't the only winners. As reported by *Publishers Weekly*, Nielsen BookScan showed the mass merchandiser channel as the biggest winner for sales following the week of the release for *Harry Potter and the Cursed Child: Parts 1 & 2*. While book clubs and retailers enjoyed a solid jump, mass merchants such as Walmart accounted for 33% of sales. That share is much higher than typical, with 17% cited as an example. But the channel is still struggling with book sales; even with the 40% increase in sales courtesy of *Cursed Child*, unit sales were down 4% through Aug. 7 compared to the same period in 2015.

EDITORIAL

The Language of Licensing

The language of licensing is slowly shifting to reflect new practices and perceptions. To this end, *TLL* surveyed our readers to gauge the extent of these changes—and while the implications for the business are not necessarily immediate or obvious, they run deep and true.

Walking the floor of Licensing Expo 2016, it was clear that there exists a strict divide between the "old guard" of licensing and the contemporary "new wave." To be clear: the tides of change are being led by those who have been part of the industry when it was far more volatile than it is today. More than anyone else, they are in a position to recognize that the business has room to evolve. And they are interested in self-referential questions: Over 90% of respondents to the survey have been involved in licensing for 10 years or more.

The majority of respondents identify as agents (36%) or consultants and service providers (36%) with licensors (18%) rounding out the top three. Over half (55%) are based in and do their primary business in the U.S. and Canada, with international respondents hailing primarily from Australia/New Zealand (18%) and Latin America (9%).

Note that the makeup of respondents is skewed for this survey, which asks questions about change in language over time. But our findings are not surprising: over the years, *TLL* sources have described this very same trend in our *Annual Licensing Business Survey*. A more accurate picture of who's who; as of July 2016, 48% of listees in the *Licensing Source Book* are licensees, 28% licensors, 14% agents and 10% consultants. And in *TLL's 2016 Salary Survey*, which has a broader scope, just half of respondents (54%) have been involved in the licensing business for 10 years or more.

In the Beginning

While the origin myth varies, most agree that the modern form of entertainment/character licensing took off from the first *Star Wars* film (1977). That program, led by toy licensee Kenner, helped to introduce licensing in the minds of business executives as a profitable business strategy.

TLL was founded in 1977 and LIMA in 1985 to serve an ad hoc community of individuals who pursue licensing as a career. And these professionals are not necessarily tied down to any one industry—their specific skill set allows them to easily move from film studios to magazine publishers to car manufacturers. Although there is no standard certification, dedicated courses at colleges and universities as well as informal training programs began appearing with the maturation of licensing in the 2000s. In the shadow of the great recession, the 2010s have been the most dynamic decade yet—licensing efforts have become more strategic as companies are pressured by economic factors.

For all the millions in revenue licensing provides in royalties and marketing value, it is a remarkably silent industry. That is changing in recent years as licensing enters the public and corporate lexicon, in no small part thanks to headline snatching programs such as Angry Birds and Star Wars. There is no question that more companies are recognizing the value of licensing, but, as one consultant notes, "it still feels isolated from the rest of marketing." Another adds that although companies are comfortable with spending money on advertising and sponsorships, "many brands are too fixated on royalty revenue as opposed to the tremendous [marketing] value," licensing provides. In introducing new players to the licensing model, practitioners often face the added hurdle of education. While it is growing, the "lack of sophistication in the licensing industry as a whole," as one agent puts it, means that a select number of A-list properties dominate an increasingly competitive retail landscape.

"Licensing is following the path of public relations, which has developed into a real industry after decades of being just a business model," says Stu Seltzer of Seltzer Licensing Group. Having recently completed his 13th year teaching a licensing course at New York University, Seltzer notes that the "business has evolved and has become more sophisticated over the past 15 years," with thicker contracts and more educational material available. The question is whether or not the current trend in changing language will facilitate greater diversity in the players involved and encourage smarter programs.

Business vs. Industry

The most common ways we describe what we do are the "business of licensing/licensing business" and "licensing industry." The former implies that practitioners engage in a standard commercial activity or procedure, while the latter connotes that they are involved in an organized commercial enterprise. In this way, using industry infers that there exists a community of professionals dedicated to the production of licensed goods or related services, complete with their own business subculture. See the difference in tone between shows like Licensing Expo and Toy Fair or MAGIC. Interestingly, there is no significant correlation between the language people use and the frequency with which they attend trade shows.

Overall, most respondents prefer industry (36%) to business (18%). Twenty-seven percent use both terms interchangeably, claiming there is no significant difference between the two. Eighteen percent of respondents do not use either, but refer to licensing explicitly as a tool or model; of these, the majority are consultants or agents. As one agent puts it, "I am in the business of brand building; licensing is a tool."

Licensors prefer industry or both, while agents tend to favor business. Consultants were the least likely cohort to accept the terms as interchangeable, and were equally split between both.

Continued on page 6

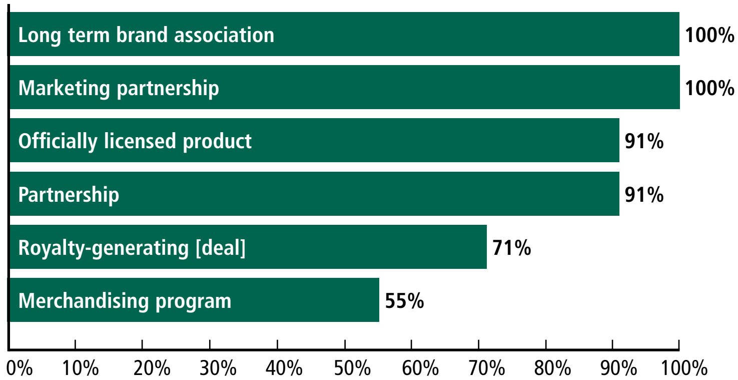
Continued from page 5

TLL uses industry and business interchangeably for practical purposes. When conducting our *Annual Licensing Business Survey*, for example, we will necessarily treat licensing as an industry in determining retail sales of licensing merchandise. The growth rate and volume of retail sales of licensed merchandise sales will differ from that of generic merchandise, especially since the companies involved, retail trends and even business models might differ. But it is true, as Karen Raugust explains in her *Licensing Business Handbook*, that licensing is "really a business tool that crosses over many separate industries, including apparel manufacturing, [...] publishing, entertainment, and so on."

According to Google Book's Ngram Viewer, which shows the use of a particular phrase in books through time, licensing industry is now on a downturn compared to licensing business. The same search performed through Google Trends, which tracks search terms from February 2014 through July 2016, shows the same trend with licensing business in the lead, followed by business of licensing and licensing industry. Note that these terms are also used for software, liquor and other industries, so the trends should be taken with a grain of salt.

HOW LICENSING PROFESSIONALS REFER TO DEALS, 2016

(Share of respondents neutral to/prefer using a term)



SOURCE: The Licensing Letter

Professional Labels

When asked which labels they most identify with in a professional capacity, 60% of respondents state that they prefer licensing, followed by a role-based label (marketing, business development, etc.; 50%) and industry (apparel manufacturing, entertainment, etc.; 40%, multiple responses allowed). Including neutral responses, licensing and role-based led in popularity with 90% each. Licensing professionals wear many hats: In the *2016 Salary Survey*, 66% of respondents indicated that their primary function is licensing, 14% business development and 9% product development.

Half do not identify with or the least as an industry professional—that is, an individual who works at an apparel manufacturer would not self-identify as an apparel professional. This trend is strongest amongst those who prefer to use the term licensing industry, or whose company functions as a licensor. Licensors are the most likely cohort to strongly identify as licensing professionals, followed by agents.

A Deal by Any Other Name

As readers of the *Deal Sheet* will recognize, *TLL* refers to licensing agreements as deals. We avoid the term partnership as it implies that parties are equal investors in a joint venture, with profits and losses shared proportionally. Most deals that fall under this definition are not considered typical consumer products programs.

Despite this, the majority of respondents prefer to use partnership (91%) when referring to deals—in the colloquial sense. The standard labels of licensee and licensor are falling to the wayside as some companies consciously use partner instead. This is especially common in outside communication, such as in press releases. One possible reason for this shift is increased collaboration in deal making; the former language can imply that the conversation ends once a deal is signed. Ten years ago that was exactly the case: the onus was placed on a licensee to develop products, with or without a style guide, which they would peddle to their retailer buyers. For the brand owner, licensing was a quick and easy way to collect royalties with little effort.

But that does not have to be the case. Relationships can extend to product development, retail, marketing and beyond—and respondents agree that this is increasingly becoming the case. The current landscape is split between those companies who are "more concerned with profit margins," and "others who will truly partner with you from both a marketing and product perspective," according to one consultant. The latter relationship might involve a brand's stewards providing support for a program years after initial product has launched. And frequently, the spark for these relationships does not begin with a royalty-generating arrangement. In order to facilitate these types of growing relationships and preserve business secrecy, companies might treat all of their partners equally in terms of language. And indeed, the lines have blurred: What does it mean when a celebrity licenses their name to a manufacturer, while at the same time their agent buys shares in the company and said celebrity sits on the board of directors? For one thing, the relationship will extend for years rather than months.

LEGO is one example of a company that works with other brands such as Star Wars to develop properties beyond short term, limited collaborations by producing films as well as construction toy sets. It seems like businesses are chasing a unicorn: See the recent expansion of a two year collaboration between adidas and Kanye West with the launch of adidas + KANYE WEST. A new business unit will be established within adidas to develop retail stores; a line of apparel, footwear and accessories for men and women; and handle licensing for the new brand.

Respondents also prefer to use long term brand association (64%), official licensed product (64%), merchandising program (45%), marketing partnership (45%) and royalty-generating [deal, contract, program, etc.] (27%, multiple responses allowed) when referring to licensing deals.

Merchandising program sparked the strongest negative reaction, with an equal number of respondents (45%) stating that they avoid using the term versus preferring to use it. It was by far the most unpopular term, followed by royalty-generating [deal] (27% dislike or avoid), partnership (9%) and officially licensed product (9%). Virtually no respondents disliked marketing partnership (which had the most neutral responses at 55%) or long term brand association.

Change From the Inside

When asked if their company made any internal changes over the last year with relation to licensing, 83% of respondents answered to the affirmative. These changes include increasing staff dedicated to licensing—in the *2016 Salary Survey*, 31% of respondents said that the licensing head count in their company grew over the last year—as well as restructuring of current staff. The number of personnel changes over the last year was notable even for the oft-tumultuous licensing industry, where 55% of executives have been in their current position for five years or more, according to the *2016 Salary Survey*.

For example, over the last year Endemol Shine North America combined its branding and licensing units. This move would theoretically allow for greater efficiencies in making deals. Most companies are structured so that their branding or marketing teams do not see returns from deals struck by their licensing colleagues. When the former have to sign off on those same deals, the agents, licensors and manufacturers who might have spent years on brokering an agreement would easily be left in the lurch. In this way, companies reposition licensing as just one part of a greater marketing strategy rather than as a source of royalty income. One example: the ability to sync advertising and merchandising campaigns, such as Pepsi's emoji campaign organized by PepsiCo and the Joester Loria Group.

Another change mentioned is that companies have defined licensing as one of their major strategic goals. The extent to which this applies to companies not explicitly dedicated to licensing is questionable, if only because royalties barely make a dent in most company's bottom lines. One example of a big player that claims to have done this over the last year is DreamWorks; during the entertainment company's showcase at Expo most top executives and every film director came to present their properties.

Retailers

Retailers have been essential in developing merchandising programs for years. Look no further than examples such as Hot Topic, which took home Retailer of the Year for Doctor Who at LIMA's 2016 International Licensing Awards. And buyers have always had sway in determining which brands are licensable based on whether or not their consumer products have the potential to grab shelf space. One worrying trend, as one agent describes it, is the tendency of manufacturers to "'run the idea past my buyer' before even submitting a deal memo … doom[ing] the potential before it even has a chance."

But now there are new players in the game that are breaking traditional roles. One example is subscription box service Loot Crate. The company dubs itself a "fan-based commerce and community platform," first and foremost, in addition to providing an alternate platform for merchandise to be sold. But Loot Crate also works with its brand partners to develop and manufacture new products available exclusively through its service. While brands are conscientious about developing a social media presence, most focus on homegrown or fan-generated entertainment content rather than merchandise. Respondents stressed the importance of social media, with one licensor stating "There is no other relevant means of communicating with the consumer."

Other examples of growing alternatives to traditional brick-and-mortar stores (that have always been around) are branded stores, "shop-in-shop" experiences and mobile venues. In a way, this is a return to the most basic of retail models even as ecommerce grows and catalog and TV shrink in their share of licensed retail sales.

In Conclusion

What do you think? Contact **Karina Masolova** at karina@plainlanguagemedia.com with any comments or topics you feel *TLL* should cover. Next up, we'll tackle branding: what makes a property a brand—lifestyle, evergreen or otherwise?

TLL thanks **Gary Caplan** for his insight throughout the writing of this story. Please note that the opinions expressed are not necessarily representative of this LIMA Hall of Fame Member. Contact *The Licensing Coach* at gary@garycaplaninc.com.

Licensing News

Properties Available Or Recently Assigned, U.S.

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
BoJack Horseman	Award-winning Netflix animated series stars the most beloved sitcom horse of the 90's... 20 years later.	All	Jeff Fradin, M Zone (The)
General Mills	Food brands include Betty Crocker, Pillsbury, Cheerios, Lucky Charms, Trix, Franken Berry, Boo Berry, Count Chocula, Wheaties, Totino's and Old El Paso.	Accessories, back-to-school, gifts, Halloween costumes, kitchen storage, novelties, plush, tabletop decor	Cindy Birdsong, Brand Licensing Team
Gonzaga University	Private Catholic, Jesuit and humanistic university in Spokane, Washington whose royalties grew 25% over the previous year; thru 2024.	All	Cory Moss, Collegiate Licensing Co. (CLC)*
John Miller	Estate of London-born artist who art is "between figuration and abstraction," with Rothko and Turner cited as key influences.	All	Edward Whitley, Bridgeman Images
lovethislife	Launched in 2003 out of Malibu to celebrate our shared humanity.	Accessories, apparel, footwear, gifts, health & beauty aids, home decor, social expressions	Jeff Fradin, M Zone (The)
Milady	Provider of beauty and wellness learning solutions offers online training and professional development classes for salon and spa professionals.	Hair products, health & beauty aids, spa goods & accessories	Alan Kravetz, Leveraged Marketing Corp. of America (LMCA)
MillerCoors	Portfolio of beer brands include Miller Lite, Coors Light, Miller High Life, Coors Banquet, Blue Moon, Hamm's, Leinenkugel's and Smith & Forge.	Beach towels, drinkware, holiday products, poker sets, tailgating kits, winter accessories	Cindy Birdsong, Brand Licensing Team
Ritchie Valens	Singer, songwriter and guitarist; one of the pioneers of rock 'n' roll and a forefather of the Chicano rock movement.	All	Ani Khachoian, C3 Entertainment
Rocky Horror Picture Show	Cult classsic British musical comedy based on the 1973 musical stage production by Jim Sharman and Richard O'Brien.	Apparel & accessories, cosmetics, emoji, gifts & collectibles, intimates	Ashley Austin, Artist Legacy Group (ALG)
Swiss Diamond	High-end Swiss nonstick cookware brand founded in 2001 and appreciated by foodies, home chefs and non-compromising clientele.	Barware, dinnerware, furniture, home decor, kitchen goods, small kitchen appliances, wine accessories	Michael Gottsegen, All-American Licensing
University of Illinois	One of America's original land-grant universities and a charter member of the Big Ten Conference; merch sold by more than 1,600 retail accounts across the country.	All	Cory Moss, Collegiate Licensing Co. (CLC)*
Valencia Shibori Collection	Shibori prints mixing traditional patterns with modern motifs and color palettes by Debra Valencia; licensed in stationery, bedding and other home goods.	All	Steven Heller, Brand Liaison (The)
Wynonna Earp	TV series follows Wyatt Earp's great granddaughter as she battles demons with her unique abilities and a posse of dysfunctional allies.	All	Anietra Guzman-Santana, Idea Patch
Yogi Berra	Athlete inducted into the Baseball Hall of Fame in 1972; known for his witty one-liners and malapropisms. Licensed for use in advertising only.	Advertising, media	Martin Cribbs, Icon Representation div. Beanstalk

Licenses Recently Granted, U.S.

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Adventure Time, Steven Universe, Dexter's Laboratory	Hot Topic	Bomber jackets, dresses, jumpers, t-shirts	Cartoon Network Enterprises
Aftate	Sabel Medical Products	Antifungal products, first aid products, healthcare products	Lisa Marks Associates (LMA)
Amylee Weeks	Certified Intl.	Housewares	MHS Licensing + Consulting
	Conimar		
	Thirstystone Resources	Serveware	
Audrey Jeanne Roberts	Conimar	Housewares	
	Portmeirion Group USA	Ceramic housewares	
B.U.M. Equipment	Land N Sea	Apparel (infants', toddlers')	B.U.M. Equipment
Beauty and the Beast (2017 film)	Tokyopop	Manga	Disney Consumer Products
Betty Crocker	Rapid Brands	Microwave cookware	Brand Licensing Team
Candy Crush Saga	Marble Slab Creamery	Ice cream	King
Carlos Falchi	Accessory Headquarters (AHQ)	Handbags, purses	Carlos Falchi
Christine Adolph	Conimar	Housewares	MHS Licensing + Consulting
	DesignScapes	Stationery	
	Toland Home & Garden	Decorative flags, mats	
Collin Bogle	Fabrique Innovations	Domestics	
Coors Banquet	Rogers-Whitley	Belt buckles, small leather accessories	Brand Licensing Team
Coors Light	Phunkshun Wear	Winter accessories	
Corona	SmartWorks Consumer Products	Grilling accessories	Joester Loria Group

*Extension or renewal.

Continued on page 9

Licensing News *Continued from page 8*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Dan Howell & Phil Lester	Penguin Random House	Books	FlipSide Talent div. Endemol Shine U.K.
Darrell Bush	Elizabeth's Studio	Fabrics	MHS Licensing + Consulting
	Portmeirion Group USA	Ceramic housewares	
	Signature Brands	Tins	
Darren Gygi	Studio M	Gifts, outdoor decor	
Disney	Ethan Allen	Furniture, home decor	Disney Consumer Products
Dr. Seuss	Petco*	Pet accessories, pet toys	Dr. Seuss Enterprises L.P.
Emeril Lagasse	Jack Schwartz Shoes (JSSI)	Footwear	Sequential Brands Group
Empire	King Ice	Jewelry	20th Century Fox Consumer Products
Football Greats Alliance	Turner Licensing div. The LANG Companies	Calendars	WME/IMG
General Mills	FunKo	Vinyl collectibles	Brand Licensing Team
	IQ Accessories	Gift sets	
	Mad Engine	Apparel, loungewear	
	Taste Beauty	Cosmetics	
Hautman Brothers	Cathedral Press	Publishing	MHS Licensing + Consulting
	Pegasus Home Fashions	Bedding	
	Precious Moments	Giftware	
	Signature Brands	Tins	
	Thirstystone Resources	Serveware	
i am OTHER	Yoobi	Back-to-school, notebooks, pencil cases, pens	i am OTHER entertainment
James Meger	Manual Woodworkers & Weavers (MWW)	Home decor	MHS Licensing + Consulting
	Toland Home & Garden	Decorative flags, mats	
Jamie Kalvestran	Duke Imports	Domestics	
Jimmie Martin	Mod Life Collection	Pillows	Jimmie Martin
Judy Buswell	Cathedral Press	Publishing	MHS Licensing + Consulting
	Plaid Enterprises	Craft sewing kits	
Kathy Hatch	DesignScapes	Stationery	
Katy Perry	Global Brands Group	Footwear, pumps, sandals, shoes (women's), sneakers, stilettos	Bravado Intl. Group Merchandising Services
Kim Norlien	Cathedral Press	Publishing	MHS Licensing + Consulting
KISS	Odd Sox	Boxers, socks	Epic Rights
Laura Ashley	Orchard Supply Hardware (OSH)	Garden tools, gardening accessories	Laura Ashley
Limited Too	Chlogan Eyewear	Eyewear	Bluestar Alliance
Lisa Jane Smith	Evergreen Enterprises	Housewares	MHS Licensing + Consulting
Little League Baseball	TeamMarketing div. WaxWorks	Apparel, domestics, games, personal accessories, school supplies, toys	Fermata Partners
Louise Carey	Creative Tops	Housewares	MHS Licensing + Consulting
Lynn Sanchelli	DEMDACO	Gifts & collectibles	
Mentos	Bare Tree Media	Emoji, virtual goods, virtual stickers	Lisa Marks Associates (LMA)
	Rotuba Extruders	Air fresheners, pens, scented jewelry, scented pencils, scented rulers	
MillerCoors	ECI Furniture	Wood furniture	Brand Licensing Team
	Koolatron	Coolers	
	Lionel Trains	Model train cars	
	M. Cornell Importers	Steins	
	Neonetics	Neon signs	
	Orca Coolers	Coolers	
	SG Footwear div. SG Companies	Footwear	
	Slick Woody's Cornhole Co. div. IPG Global Marketing	Tailgating kits	
Monster Cereals	Fright Rags	Masks, socks, t-shirts	
MoonPie	Covee	Cold weather accessories, headwear, hosiery, knits	Lisa Marks Associates (LMA)
Nerve	SilVR Thread	VR games (Samsung Gear VR, Google Cardboard)	Lionsgate
NRA	Jesse James/West Coast Choppers	Apparel	National Rifle Association of America (NRA)
Patrick Reid O'Brien	Creative Bath Products	Bath products	MHS Licensing + Consulting
Pete the Cat	Enesco/Department 56	Ornaments	MerryMakers

*Extension or renewal.

Continued on page 10

Licensing News *Continued from page 9*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Pete the Cat	Everything Legwear	Socks, tights	MerryMakers
	Jay Franco & Sons	Bath, bedding	
	Kids Preferred	Soft toys, toys	
	Marcus Brothers	DIY crafts, fabrics	
PEZ Candy	American Classics	Apparel	Lisa Marks Associates (LMA)
	Covee	Cold weather accessories, headwear, hosiery, knits	
	Super Impulse USA div. Topcat Worldwide	Key chains, miniatures	
	Taste Beauty	Cosmetic bags, gift sets, hair color, lip balms & glosses, lip care, nail polish, nail products	
Precious Moments	Boys Town	Calendars	Precious Moments
Rick & Morty	Cryptozoic Entertainment	Board games, card games, dice games	Cartoon Network Enterprises
	FunKo	Collectibles, plush, vinyl figures	
	PhatMojo	Halloween accessories, Halloween costumes	
	USAOPOLY	Cards, games, puzzles	
Robin Roderick	Downeast Concepts/Cape Shore	Gifts & collectibles	MHS Licensing + Consulting
Rocky Horror Picture Show	Hanky Panky	Lingerie	Artist Legacy Group (ALG)
Stephanie Ryan	Enchante Accessories	Stationery	MHS Licensing + Consulting
	Homefires/Home Comfort	Rugs	
Suicide Squad	Hot Toys Ltd.	Action figures	Warner Bros. Consumer Products
	Neff Headwear	Apparel, t-shirts	
Tapatio Hot Sauce	Colorado Premium	Meat products, poultry products	Brand Central
	Express Trading Intl.	Nacho cheese sauces, salsas	
	Jel Sert (The)	Powdered spices	
	PepsiCo	Potato chips	
	Thanasi Foods	Sunflower seeds	
	Thanasi Foods	Sunflower seeds	
Terry Doughty	Independent Can Co.	Decorative tins	MHS Licensing + Consulting
	Pumpernickel Press	Cards	
	Transfar Intl.	Giftware, novelties	
Trolls	Origami Owl	Jewelry	DreamWorks Animation
Velvet Gh0st	Primark	Stationery, stationery products	Velvet Gh0st
Victoria Schultz	Studio M	Gifts, outdoor decor	MHS Licensing + Consulting
	Toland Home & Garden	Decorative flags, mats	
Warheads	Bahama Buck's Franchise Corp.	Flavored syrup	Lisa Marks Associates (LMA)
Warriors (The)	Silly Kid Games	Board games	Paramount Pictures
Wonder Woman	U.S. Postal Service	Stamps	Warner Bros. Consumer Products
World of Eric Carle (The)	Jaxxwear	Apparel (infants')	Joester Loria Group
Yo-Kai Watch	Accessory Innovations	Backpacks, beanies	LEVEL-5 Abby
	American Marketing Enterprises (AME) div. LF U.S.A.	Sleepwear	
	Bioworld Merchandising	Boxers, lounge pants	
	Cortina Leomil	Footwear (boys')	
	Franco Manufacturing	Blankets, comforters, sheets	
	GBG Socks dba Planet Sox	Socks	
	Idea Nuova Global	Chairs, tables	
	MJ Holding Co.*	Character pins	
	MZ Berger & Co.	Watches	
	Starlight Accessories	Sunglasses	

International Properties Available or Recently Assigned

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Arsenal FC	English soccer club to play in the U.S. during 2016 MLS All-Star Game and in a friendly match against Chivas de Guadalajara.	All (North America)	Scott Bouyack, Fermata Partners
B.U.M. Equipment	California lifestyle brand celebrates its 30th birthday for fall/holiday 2016 with a re-entry into the manufacturing business.	Accessories, apparel, footwear, fragrance (Worldwide)	Stephen Wayne, B.U.M. Equipment

*Extension or renewal.

Continued on page 11

Licensing News *Continued from page 10*

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Bigfoot 4x4	Monster truck manufacturer for the Bigfoot and Snake Bite brands; most licensing categories available.	Apparel, collectibles, toys (Worldwide)	Bob Chandler, Bigfoot 4X4
Cereal Killer Cafe	The first cereal-themed cafe, situated in London's East End, selling 120+ cereals, plus a selection of milk and toppings.	Apparel, food, gifts, health & beauty (U.K.)	George Birtchnell, Point.1888 (The)
Dragon Ball	Japanese anime follows the adventures of the protagonist Goku in his quest to gather the seven wish-granting Dragon Balls.	Apparel, footwear, jewelry, watches (U.K., Eire)	Russell Neale Dever, Those Licensing People (TLP)
Dragon Ball Z	Sequel stars Goku in his adult life as he defends the Earth with with his companions.		
Duff Goldman	Celebrity chef whose bakeries, Charm City Cakes, are located in Los Angeles and Baltimore.	Baked goods, confections, kitchen utensils, toys (North America)	Todd Lustgarten, Perpetual Licensing
Edward Stanford Cartographic Collection (The)	Archive map collection and logo from London mapseller Stanfords encompasses heritage, credibility and expertise.	Accessories, flasks, stationery, textiles, travel bags & accessories (U.K.)	Charlie Donaldson, Rocket Licensing
Flo Rida	American hip hop artist; representation includes licensing, brand ambassadorships, endorsements and product placement.	All (Worldwide)	David Gold, D3M Licensing Group
Game of Thrones	American fantasy drama television series adapted from George R.R. Martin's book series "A Song of Ice and Fire".	All (India)	Bhavik Vora, Black White Orange Brands Pvt. Ltd.
Grumpy Cat	Feline internet sensation known for her seemingly grumpy expression.	All (U.K.)	Alex Mitchell, Bravado Intl. Group Merchandising Services
Hobgoblin	The U.K.'s No. 3 premium bottled ale from Wychwood Brewery boasts a unique mischievous brand character.	All (U.K.)	Andrew Maconie, Licensing Management Intl.
Hurlingham Polo Assn.	Governing body for polo in the U.K., Ireland, UAE and others to develop into lifestyle brand. Released English national polo kit with new design and fabrics.	Apparel, sportswear (Worldwide)	Oliver Hughes, Hurlingham Polo Association
LEON	U.K.-based quick service chain specializing in naturally fast food counts 37 restaurants with plans to expand.	All (U.K.)	Jack Allen, Point.1888 (The)
Life is Strange	Five part episodic game follows Max, a photography senior who saves an old friend after discovering she can rewind time.	All (North America, Europe, Middle East)	Steve Manners, CPLG U.K. (Copyright Promotions Licensing Group)
LIPEX (London IP Exchange)	Intellectual property marketplace focused on creating a worldwide market for brands, currently boasting over 50,000 trademarks.	All (Worldwide)	Andrew Maconie, Licensing Management Intl.
Magical Toothfairies (The)	Animated stories centered around the classic tooth fairy myth follows the adventures of the four main characters around the world.	All (European Union)	Michael A. Lou, V.I.P. Entertainment & Merchandising AG
Mahatma Gandhi	Spiritual and political leader who practiced non-violent resistance and led the Indian Independence movement against British rule.	All (Worldwide)	Martin Cribbs, Icon Representation div. Beanstalk
Oily Rag	Classic British motorcycle lifestyle brand.	Apparel, home furnishings, stationery, textiles, wall art (Worldwide)	Todd Lustgarten, Perpetual Licensing
Phil Frost	Urban artist with signature style of funky Hawaiian Tribalism.	Home furnishings, textiles (Worldwide)	
St. Pancras International	London railway station celebrates its 150th anniversary in 2018; hosts 48 million visitors a year, who spend an average of 40 minutes at the landmark.	All (Worldwide)	Adam Bass, Golden Goose
Super Wings	Animated South Korean cartoon series will be broadcast on German kids' channel KIKA in a prime time slot in early 2017.	All (Germany)	Bernd Conrad, m4e AG
Tokidoki	Art-based brand founded 2003 by designer Simone Legno and partners Pooneh Mohajer and Ivan Arnold.	Apparel, consumer products, hand bags (Russia, CIS)	Denis Kulakov, brand4rent
Tour de France	Cycling's premier competition seeks to expand further with souvenir merchandise, performance and lifestyle products and promotional partners.	Accessories, housewares, publishing (U.K., Eire)	Daniel McGeehan, CPLG U.K. (Copyright Promotions Licensing Group)

International Licenses Recently Granted

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Angry Birds	Wilko	Trainer bags (U.K.)	Rovio Entertainment
Animal Jam	Cooneen	Nightwear (U.K.)	Rockpool Licensing
	Dreamtex	Bedding, textiles (U.K.)	
	Gemma Intl.	Gift wrap, greeting cards, party paperware (U.K.)	
	Misirli U.K. Ltd.	Nightwear (U.K.)	
	Posh Paws Intl. LLP	Backpacks, bags (U.K.)	
Batman v Superman	Wilko	Bottles, lunch bags (U.K.)	Warner Bros. Consumer Products
Billy Idol	MadeWorn	Cashmere apparel, denim shorts, jackets, knit tops, leather apparel, t-shirts (Worldwide)	Epic Rights
Bing	HTI Group*	Bubble toys, musical instruments (U.K., Ireland)	Licensing Company, U.K. (The)
Bob the Builder	Jumbo Games*	Games, jigsaw puzzles (U.K.)	Mattel U.K. Ltd.
Care Bears	Boy Meets Girl*	Athleisure (women's), hoodies, sweats, t-shirts, tank tops (Worldwide)	American Greetings Entertainment
Cereal Killer Cafe	Kimm & Miller	Gift items (U.K.)	Point.1888 (The)

***Extension or renewal.**

Continued on page 12

Licensing News *Continued from page 11*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Colour Fairies	Mustang Enterprises	Socks (children's, toddlers'), underwear (children's, toddlers') (India)	Aadarsh Pvt. Ltd.
Crystal Palace FC	Electronic Arts (EA)	Video games (Worldwide; 2016/2017 season)	Crystal Palace Football Club
	Aykroyd & Sons Ltd.	Nightwear (U.K.)	Warner Bros. Consumer Products
	Blues Clothing div. CWI Intl. (Holdings) Ltd.	Daywear (U.K.)	
	Cooneen	Nightwear (U.K.)	
	Pyramid Intl.	Badges, key chains, mugs, notebooks, posters (U.K.)	
	Smith & Brooks Ltd.	Daywear (U.K.)	
Def Leppard	MadeWorn	Cashmere apparel, denim shorts, jackets, knit tops, leather apparel, t-shirts (Worldwide)	Epic Rights
Dinosaur Roar!	Aykroyd & Sons Ltd.	Nightwear (U.K.)	Nurture Rights
	Blues Clothing div. CWI Intl. (Holdings) Ltd.	Daywear (U.K.)	
	Roy Lowe & Sons Ltd.	Socks (U.K.)	
	VMC Accessories	Accessories, dress-up (U.K.)	
	William Lamb Footwear	Footwear (U.K.)	
Doctor Who	Penguin Random House (U.K.)	Cookbooks (U.K.)	BBC Worldwide
Dragon Ball Super	Viz Media Europe S.A.R.L.	Calendars, diaries (France; French-speaking Belgium, Switzerland, Luxembourg)	Toei Animation Europe S.A.S.
Dragon Ball Z	Undiz	Boxers (men's), pajamas (men's) (France, Belgium, Spain, Germany, Poland, Qatar, Oman, UAE, Kuwait, Bahrein, Saudi Arabia)	
Energizer	Intl. Pet Group (IPG)	Battery- & USB-powered LED lighting product solutions (Worldwide)	Beanstalk
Felix the Cat	Burton Metal Depository	Amulets, cufflinks, tie bars (U.S., Australia, Japan, South Korea, Singapore, Hong Kong)	DreamWorks Animation (U.K.), First Thread (The)
	Caslazur	Resortwear (U.S., Australia, Japan, South Korea, Singapore, Hong Kong)	
	LunarSand	Swimwear (U.S., Australia, Japan, South Korea, Singapore, Hong Kong)	
	Mariam Seddiq	Sweatshirts (U.S., Australia, Japan, South Korea, Singapore, Hong Kong)	
	Nylons Jewellery	Chokers, earrings, key rings (U.S., Australia, Japan, South Korea, Singapore, Hong Kong)	
	Phoenix Keating	Catsuits (U.S., Australia, Japan, South Korea, Singapore, Hong Kong)	
	Pizzuto	Pants (U.S., Australia, Japan, South Korea, Singapore, Hong Kong)	
Fifty Shades of Grey	Coco de Mer	Lingerie (U.K.)	Caroline Mickler
	Lovehoney*	Pleasure products (Worldwide; thru 2018)	
Finding Dory	Aquabeads/EPOCH making toys Ltd.	Craft kits (U.K.)	Disney Consumer Products
	Wilko	Bottles, lunch bags (U.K.)	
Frozen	Wilko	Back-to-school (U.K.)	
Game of Thrones	MEY Designs	Necklaces, replica jewelry, rings (U.S., Europe)	HBO, Glue Creative Thinking
Gary Baseman	Dr. Martens/AirWair Intl.	Accessories, footwear, t-shirts (Worldwide)	Epic Rights
Gorjuss	Benetton Group	Loungewear, nightwear (Worldwide)	Santoro London
	Educa Borras SA	Jigsaw puzzles (Europe)	
	Jumbo Games		
	Ravensburger AG		
	Suncrest Trading	Plush dolls (U.K.)	
Great British Bake Off	Gibsons	Puzzles (U.K.)	Metrostar Media Ltd.
Hello Kitty	Tangle Teezer Ltd.	Brushes (Worldwide)	Sanrio GmbH
	Wilko	Trainer bags (U.K.)	
Hey Duggee	Entertainment Store (The)	Character appearances, live events (Australia)	BBC Worldwide Australia
	Kinnerton Confectionery Australia Pty Ltd.	Seasonal confections (Australia)	
	MacDonald Imports Pty Ltd.	Dinnerware, housewares, infant feeding products (Australia)	
J.K. Rowling's Wizarding World	Walker Books U.K.	Interactive books (children's), novelty books (U.K., Australia)	Warner Bros. Consumer Products, Insight Editions
Jennifer Lopez	Giuseppe Zanotti Design	Footwear, handbags (Worldwide)	Licensing Company (The)
Journey	MadeWorn	Cashmere apparel, denim shorts, jackets, knit tops, leather apparel, t-shirts (Worldwide)	Epic Rights
KISS	Brand Design S.A.	Bags, boxers, caps, shorts, sweatpants, sweatshirts, t-shirts (Switzerland, Italy, Spain, Netherlands, Denmark)	
	Low Frequency Records Ay	Accessories, apparel, headwear, stationery (Finland, Norway, Sweden, Denmark)	
	MadeWorn	Cashmere apparel, denim shorts, jackets, knit tops, leather apparel, t-shirts (Worldwide)	
	Robert Kaufman Fabrics	Fabrics (North America)	
Kori Kumi	Joumma Bags S.L.	Luggage, travel bags (Spain)	Santoro London
Laurel & Hardy	Mad Duck Posters	Limited edition posters (North, South and Central America)	Larry Harmon Pictures

*Extension or renewal.

Continued on page 13

Licensing News *Continued from page 12*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Legend of Zelda	Merchoid Ltd.*	Dresses (Worldwide)	Nintendo of America
LEON	John Lewis Partnership	Cookware (U.K.)	Point.1888 (The)
Liverpool FC	Konami Digital Entertainment	Video games (Worldwide; 3 yrs.)	Liverpool Football Club
Lucky Brand	Camuto Group	Handbags (Worldwide)	Lucky Brand Jeans
Mickey & Minnie Mouse	Gap	Apparel (children's, infants', toddlers') (U.S., Canada, U.K., Japan, China; thru 2018)	Disney Consumer Products
Mickey & Minnie Mouse x Royal Canadian Mounted Police	2 Blue Ducks	Plush (Canada)	Disney Consumer Products, RCMP Foundation
Minions	Rusty Surfboards	Board shorts, denim shorts, dresses, swimwear, t-shirts (North America, Europe, Australia)	NBCUniversal Consumer Products
Motley Crue	Lovehoney	Pleasure products (Worldwide)	Global Merchandising Services
Mr. Men & Little Miss	My Name Tags	Name tags (Europe)	Sanrio
	PMS Intl.	Backpacks, travel comfort pillows, trolleys (U.K.)	Sanrio GmbH
	Tobias & the Bear	Bibs, blankets (infants'), duvet sets, leggings, rompers, sweatshirts, t-shirts (U.K.)	
Octonauts	Fisher-Price	Playsets, vehicles (Spain)	Silvergate Media, Ypsilon Licensing div. Ypsilon Films
	Joumma Bags S.L.	Back-to-school (Spain)	
	Montichelvo Industrial S.A.		
	Planeta Editorial	Publishing (Spain)	
Playboy	Bras N Things	Bodysuits, bras, briefs, suspenders (ANZ, South Africa)	Playboy Enterprises
	Supreme*	Apparel (U.S., U.K., France, Japan)	
Pokémon	Character World/TDS Enterprises	Bean bags, bedding, curtains, cushions, duvet sets, towels (U.K., Nordics)	Pokémon Company Intl.
Popeye	Alpargatas/Havaianas	Flip flops (Brazil)	BR Licensing
Precious Moments	Lux Design Ltd.	Jewelry (Hong Kong, Macau)	Precious Moments
	Traly	Back-to-school stationery (U.S., Canada)	
Purple Turtle	Mustang Enterprises	Socks (children's, toddlers'), underwear (children's, toddlers') (India)	Aadarsh Pvt. Ltd.
Rick & Morty	Bioworld Merchandising	Accessories (North America)	Cartoon Network Enterprises
	Hot Properties! Merchandising	Buttons, key chains, magnets, patches, stickers (North America)	
	HYP/Hypnotic Hats	Hosiery (North America)	
	Ripple Junction	Pins, sweatshirts, t-shirts (North America)	
	Surreal Entertainment	Beverage containers, coin banks, glassware (North America)	
RWBY	Viz Media	Publishing (Worldwide)	Rooster Teeth Productions
Science Museum	B.M. Fashion Ltd. t/a Fashion U.K.	Daywear, nightwear, socks, underwear (U.K.)	Science Museum Group
Sesame Street	Running Press Book Publishers	Publishing (North America)	Sesame Workshop
Shopkins	Wilko	Bottles, lunch bags (U.K.)	Moose Toys
Smiley	Etam Lingerie SAS	Loungewear, sleepwear (France)	SmileyWorld
	LazyBee	Accessories, apparel, leisurewear, swimwear (South Korea)	
Smurfs (The)	PMS Intl.	Outdoor toys, small toys, stationery (U.K., Eire)	Rocket Licensing
Smurfs: The Lost Village	PMS Intl.	Outdoor play equipment, small toys, stationery (U.K., Eire)	Rocket Licensing
SpacePOP	Bare Tree Media	Emoji (North America)	Genius Brands Intl.
	Berkshire Fashions	Cold weather accessories, headwear, hosiery (North America)	
	Canal Toys	Activity sets, crafts (North America)	
	FAB Starpoint	Accessories, backpacks, bags (North America)	
	Franco Manufacturing	Accessories, bath textiles, bedding, room decor (North America)	
	Mad Dog Concepts	Loungewear, sleepwear (North America)	
	Madame Alexander Doll Co.	Fashion dolls, figures (North America)	
	SDI Technologies/KIDdesigns	Electronic accessories, electronic toys, electronics (North America)	
	Taste Beauty	Bath products, beauty supplies (North America)	
	Yowie North America	Confectionery (North America)	
Star Trek	Modiphius Entertainment	Role playing games (Worldwide)	CBS Consumer Products
Star Wars	Wilko	Stationery (U.K.)	Disney Consumer Products
Sticks Collection	Enesco	Giftware (Worldwide)	Blue Trellis
Super Wings	Claudio Reig S.L.	Musical toys (Iberia)	Nottingham Forest
	ColorBaby S.L.	Beach items, master toy, outdoor toys, scooters (Iberia)	
	CyP Brands Evolution S.L.	Back-to-school, figures, gifts (Iberia)	
	Educa Borras SA	Outdoor play equipment, ride-ons (Iberia)	
	Giochi Preziosi	Arts & crafts, board games, educational toys, puzzles, role play (Iberia)	

*Extension or renewal.

Continued on page 14

Licensing News *Continued from page 13*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Super Wings	Joumma Bags S.L.	Back-to-school, travel bags (Iberia)	Nottingham Forest
	Lugar Difusión S.L.	Cosmetics, hair accessories, jewelry (Iberia)	
	Toimsa Bicicletas e Brinquedos Lda.	Bicycles (Iberia)	
Tarzan of the Apes	Microgaming	Online slots (Worldwide)	Edgar Rice Burroughs Inc., Creative Licensing Corp. (CLC)
Tsum Tsum	Wilko	Bottles, lunch bags, stationery (U.K.)	Disney Consumer Products
Yo-Kai Watch	NTD Apparel	Pajamas (boys'), t-shirts (boys') (Canada)	LEVEL-5 Abby
	Scentco	Scented stationery, scented toys (U.S., Canada)	
ZZ Top	MadeWorn	Cashmere apparel, denim shorts, jackets, knit tops, leather apparel, t-shirts (Worldwide)	Epic Rights

*Extension or renewal.

contacts & connections

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

20th Century Fox Consumer Products, Stacey Kerr, VP Domestic Licensing, 310-369-5834, stacey.kerr@fox.com, P. 8,9.

Accessory Headquarters (AHQ), Abe Chehebar, CEO, 212-328-1560, achehebara@ahq.com, P. 8.

Accessory Innovations, Karyn Weiss, SVP Business Development & Licensing, 212-292-1238, kweiss@accessory-innovations.com, P. 10.

All-American Licensing, Michael Gottsegen, Licensing Executive, 818-749-7236, michael@aalmg.com, P. 8.

American Classics, Tommy Cost, VP, 256-737-9995, david@americanclassics.bz, P. 10.

American Greetings Entertainment, Nora Wong, VP Domestic Licensing, 310-492-3412, nwong@ag.com, P. 11.

American Marketing Enterprises (AME) div. LF U.S.A., Elliott Azrak, EVP Global Licensing, 646-839-7322 x117322, elliott@ameny.com, P. 10.

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Continued on page 16

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contacts & connections *Continued from page 19*

international contacts & connections

This section refers to the International listings in this issue. International calls from the U.S. and Canada must be preceded by the 011-prefix.

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Continued on page 18

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TOY SALES

Star Wars Blasts Toy Industry Growth to Century High

Toys based on movie, TV and other entertainment content licenses will push U.S. toy sales to growth of 7.0% in 2016, the market's fastest growth this century, predicts The NPD Group.

U.S. toy sales grew a stellar 7.5% in the first half of this year, outpacing first-half growth in 2015, when full-year growth ended up at 6.7%, according to NPD. The biggest driver: Star Wars, with dollar sales for toys based on the franchise increasing nearly 200% for the year through June, representing $300 million in consumer sales. That compares to $700 million in Star Wars toy sales for all of 2015, NPD reported. "With two-thirds of toy sales yet to come in 2016, Star Wars could be even bigger this year than last," said Juli Lennett, SVP & Toys Industry Analyst at NPD.

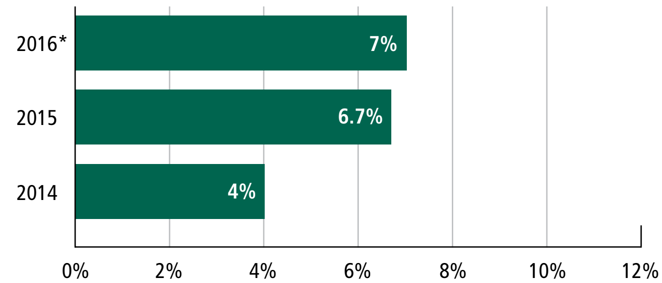
"Toys with movie tie-ins will continue to contribute to the increase, stemming from those released both in 2015 and 2016. Television, over-the-top and other content providers, like YouTube and social media, also will continue to drive growth," said Lennett.

Licensed toys for the past couple of years have outperformed the overall toy market in sales growth, driven by top franchises including Star Wars and Frozen, both Disney properties.

In 2014, North American sales of licensed toys grew 7%, according to *TLL's Annual Licensing Business Survey*, compared to 4% toy growth overall. In 2015, licensed toy sales grew 8.1%, compared to 6.7% growth overall.

Another top reason for industry growth this year is the soaring popularity of outdoor and sports toys, with the "super-category" responsible for almost one third of the industry's growth this year, NPD reported.

RATE OF GROWTH IN TOY SALES, U.S., 2014–2016



NOTE: *Forecast, based on 7.5% growth in the first half of the year
SOURCE: The NPD Group

TOP 10 U.S. TOY PROPERTIES, BASED ON RETAIL SALES, JAN.–JUN. 2016

RANK	PROPERTY	LICENSOR
1	Star Wars	Disney/Lucasfilm
2	NERF	Hasbro
3	Shopkins	Moose Toys
4	Pokemon	The Pokemon Co.
5	Barbie	Mattel
6	LEGO Star Wars	LEGO/Disney
7	Little Tikes	MGA Entertainment
8	Frozen	Disney
9	Hot Wheels	Mattel
10	Minecraft	Microsoft

SOURCE: The NPD Group/Weekly Retail Tracking Service; 26 weeks ending Jul. 2, 2016.

World's Largest Licensing Markets

Continued from page 1

- As Brazil sinks deeper into recession, look for either Spain (currently number 11) or Mexico (number 12) to replace it in the top 10.

Movement in the Middle and Lower Tiers

There have also been some shifts in the middle and lower tiers of the rankings since 2013. Countries that fell back in 2015 include:

- Greece (from 24 to 29);
- Russia (from 26 to 30);
- Turkey (from 17 to 18);
- Austria (from 19 to 20); and
- Czech Republic (from 40 to 41).

Countries that moved up include:

- Taiwan (from 18 to 17);
- South Africa (from 20 to 19);
- Finland (from 25 to 24);
- Hong Kong (from 27 to 25);
- Norway (from 28 to 26);
- Portugal (from 29 to 27); and
- New Zealand (from 30 to 28).

TOP COUNTRIES RANKED BY TOTAL RETAIL SALES OF LICENSED MERCHANDISE, 2014–2015 (Figures in millions)

RANK	COUNTRY	RETAIL SALES, 2015	RETAIL SALES, 2014	CHANGE, 2014–2015	MARKET SHARE, 2015
1	U.S.	$93,826	$90,289	3.9%	57.7%
2	Japan	$10,155	$10,186	-0.3%	6.2%
3	Canada	$9,449	$9,584	-1.4%	5.8%
4	U.K.	$7,329	$7,102	3.2%	4.5%
5	France	$6,425	$6,393	0.5%	3.9%
6	China (mainland)	$6,295	$5,939	6.0%	3.9%
7	Germany	$5,368	$5,181	3.6%	3.3%
8	Italy	$4,368	$4,351	0.4%	2.7%
9	Brazil	$2,133	$2,217	-3.8%	1.3%
10	Australia	$2,029	$2,049	-1.0%	1.2%
11	Spain	$1,679	$1,641	2.3%	1.0%
12	Mexico	$1,462	$1,411	3.6%	0.9%
13	Netherlands	$1,316	$1,294	1.7%	0.8%
14	Belgium	$857	$850	0.8%	0.5%
15	Sweden	$753	$741	1.6%	0.5%
16	India	$741	$678	9.2%	0.5%
17	Taiwan	$533	$521	2.2%	0.3%
18	Turkey	$521	$518	0.5%	0.3%

TOP COUNTRIES RANKED BY TOTAL RETAIL SALES OF LICENSED MERCHANDISE, 2014–2015 (Figures in millions; cont.)

RANK	COUNTRY	RETAIL SALES, 2015	RETAIL SALES, 2014	CHANGE, 2014–2015	MARKET SHARE, 2015
19	South Africa	$506	$489	3.4%	0.3%
20	Austria	$495	$498	-0.5%	0.3%
21	Switzerland	$452	$447	1.2%	0.3%
22	Denmark	$436	$433	0.7%	0.3%
23	South Korea	$422	$412	2.3%	0.3%
24	Finland	$316	$326	-3.0%	0.2%
25	Hong Kong	$301	$296	1.6%	0.2%
26	Norway	$286	$284	0.9%	0.2%
27	Portugal	$284	$280	1.4%	0.2%
28	New Zealand	$279	$273	2.2%	0.2%
29	Greece	$232	$312	-25.6%	0.1%
30	Russia	$226	$279	-18.9%	0.1%
31	Saudi Arabia	$202	$196	3.3%	0.1%
32	Chile	$193	$191	1.5%	0.1%
33	Argentina	$158	$161	-1.7%	0.1%
34	Ireland/Eire	$146	$142	2.8%	0.1%
35	Poland	$123	$121	2.0%	0.1%
36	Singapore	$93	$93	0.6%	0.1%
37	Philippines	$82	$78	4.1%	0.1%
38	Macau	$64	$71	-9.5%	0.0%
39	Malaysia	$64	$64	0.3%	0.0%
40	Indonesia	$62	$62	0.5%	0.0%
41	Czech Republic	$62	$60	3.1%	0.0%
42	Hungary	$56	$55	2.9%	0.0%
43	UAE	$50	$48	3.3%	0.0%
44	Qatar	$40	$39	3.0%	0.0%
45	Iceland	$39	$38	2.1%	0.0%
46	Thailand	$22	$22	2.5%	0.0%
47	Luxembourg	$20	$20	0.3%	0.0%
48	Egypt	$17	$17	3.5%	0.0%
49	Vietnam	$12	$11	7.5%	0.0%
	Others Western Europe	$415	$418	-0.7%	0.3%
	Others Central and Eastern Europe	$85	$84	1.0%	0.1%
	Others Asia	$1,001	$980	2.1%	0.6%
	Others Latin America	$137	$140	-1.8%	0.1%
	Others Middle East and Africa	$114	$110	3.6%	0.1%
	Total	**$162,734**	**$158,495**	**2.7%**	**100.0%**

Note: Numbers may not add up exactly due to rounding.
SOURCE: The Licensing Letter

WORLD OF LICENSING

U.S. & Canada Lead Per Capita Consumption for Licensed Sales

It's hardly surprising that the world's largest licensing market is also the number one consumer of licensed goods on a per capita basis. In 2015, each person in the U.S. purchased an average $293.12 worth of licensed products, nearly $30 more than the average consumer in Canada (No. 2 at $264.31), according to *TLL's Annual Licensing Business Survey.*

The disparity is even more impressive when you consider that the U.S. population is over 10 times bigger than Canada's. Until 2012, Canada did, in fact, consume licensed goods at a higher per capita rate than its neighbor to the south. But since then the two nations have travelled in opposite directions. In 2015, the trend accelerated with U.S. per capita consumption increasing 3.5% (+$10.00 per person) and Canada's falling back 2.0% (-$5.35 per person).

The Top 15

Fourteen of the top 15 countries for per capita consumption in 2015 were also in the top 15 in 2013. The one exception is New Zealand's displacement of Finland. Although the order of the top 15 is little changed, there were a couple of shifts:

- The U.K. leapfrogged Macau for the fourth spot;
- Japan moved up one spot to number 8;
- Belgium fell from 8 to 11;
- Denmark (No. 9) and the Netherlands (No. 10) each gained one spot;
- Germany moved up one place to 14.

TOP COUNTRIES RANKED BY PER CAPITA SALES OF LICENSED MERCHANDISE, 2015

RANK	COUNTRY	PER CAPITA SALES	RETAIL SALES IN MILLIONS	RANK	COUNTRY	PER CAPITA SALES	RETAIL SALES IN MILLIONS
1	U.S.	$293.12	$93,826	26	Greece	$21.23	$232
2	Canada	$264.31	$9,449	27	Qatar	$17.90	$40
3	Iceland	$118.39	$39	28	Singapore	$16.60	$93
4	U.K.	$112.58	$7,329	29	Mexico	$11.51	$1,462
5	Macau	$108.92	$64	30	Chile	$10.75	$193
6	France	$99.77	$6,425	31	Brazil	$10.26	$2,133
7	Australia	$84.65	$2,029	32	South Africa	$9.29	$506
8	Japan	$80.23	$10,155	33	South Korea	$8.36	$422
9	Denmark	$77.47	$436	34	Turkey	$6.62	$521
10	Netherlands	$77.41	$1,316	35	Saudi Arabia	$6.40	$202
11	Belgium	$76.58	$857	36	Czech Republic	$5.88	$62
12	Sweden	$76.45	$753	37	Hungary	$5.68	$56
13	Italy	$73.05	$4,368	38	UAE	$5.46	$50
14	Germany	$66.53	$5,368	39	China (mainland)	$4.57	$6,295
15	New Zealand	$61.62	$279	40	Argentina	$3.64	$158
16	Austria	$57.93	$495	41	Poland	$3.19	$123
17	Finland	$57.42	$316	42	Philippines	$2.12	$82
18	Norway	$54.88	$286	43	Malaysia	$2.11	$64
19	Switzerland	$54.85	$452	44	Russia	$1.58	$226
20	Hong Kong	$42.82	$301	45	India	$0.57	$741
21	Spain	$36.40	$1,679	46	Thailand	$0.32	$22
22	Luxembourg	$35.27	$20	47	Indonesia	$0.24	$62
23	Ireland/Eire	$31.14	$146	48	Egypt	$0.19	$17
24	Portugal	$27.44	$284	49	Vietnam	$0.13	$12
25	Taiwan	$22.69	$533				

Note: Numbers may not add up exactly due to rounding. SOURCE: The Licensing Letter

RETAIL ROUNDUP

Off-price Channel Continues to Gain Ground Ceded by Department Stores

With the back-to-school retail season in full swing and the holidays just around the corner, there's mounting evidence that the licensed product distribution trends highlighted in *Annual Licensing Business Survey*—including the growth of the dollar/value/off-price channel and the decline of department/mid-tier stores are picking up steam in 2016.

Off-price retailers will continue to take share from department stores, Moody's Investors Service believes. "We expect off-price sector revenue to grow by 6% to 8% for the next five years, outperforming the broader apparel sector by a collective 4," Moody's analyst Christina Boni told *Women's Wear Daily* last week. Moody's expects that dominant off-price retailers—including TJX Cos., Ross Stores, Burlington Coat Factory and Nordstrom Rack—will account for 10% of apparel sales by 2018, up from 8.8% currently.

Meanwhile, department store giant Macy's announced that it will close 100 full-line stores by early 2017, following 41 closures in 2015. The news came amid moves by accessible luxury brands Coach and Michael Kors to reduce their presence in department stores such as Macy's as both brands complained that the hefty discounting now common at department stores has cut into margins and their perceived cachet with customers. They prefer to sell through higher-end stores, their own specialty doors and in the ecommerce channel increasingly favored by fashion shoppers. Other fashion brands including Fossil and Ralph Lauren also continue to warn of continued traffic challenges at department stores and to re-evaluate their brand presence in the channel.

Other on-trend retail developments, by channel:

Dollar/Value/Off-Price

This channel accounted for 9.2% of all retail sales of licensed products in the U.S. and Canada in 2015, growing 0.4 percentage points, or 4.5% last year.

- Off-price arm Nordstrom Rack seriously outperformed Nordstrom's full-line business in the second quarter, with sales for all Rack operations up 11.2% and comps rising 5.3%, while full-line store and online sales were flat, with comps down 2.3%. Nordstrom will open the first of 15 planned Rack stores in Canada by 2018 and will open an additional 15 U.S. stores this fall on its way to a goal of near 300 stores by 2020.
- Dollar General in late July bought 40 of Walmart's castoff Walmart Express stores, a failed experiment by the retail behemoth to compete with dollar stores, and will convert them to Dollar General by the fall.

Department Stores/Mid-Tier

This channel accounted for 12.2% of all retail sales of licensed products in the U.S. and Canada in 2015, a decrease of 0.4 percentage points, or 3.2% from 2014.

- Kohl's exceeded analysts' earnings expectations for the second quarter by keeping tight control of inventory, but its comps were down 1.8% for the quarter and 2.8% for the half, due to a 5% plunge in customer traffic. It subsequently cut its profit outlook for the year. The chain is investing significantly in the active and wellness sector, which now accounts for 14% of its business and this year is rolling out the Under Armour brand chainwide. As popular as UA is, its retail doors trail Nike by half—the Kohl's deal could give it traction with female shoppers.

Discount/Mass

This channel accounted for a massive and stable 32.0% of all retail sales of licensed products in the U.S. and Canada in 2015, up one-tenth of one percentage point, or 0.3% from a year earlier.

- Target, seeking to goose sales growth rates below 2%, is experimenting with smaller format stores and will roll out a couple dozen more of the small and flexible format locations this year, in places including Cupertino, California and Brooklyn, New York.

WORLD OF LICENSING

BRICs Falling—Tough Times in Emerging Licensing Markets

Just a few years ago, the BRIC countries of Brazil, Russia, India and China seemed to be emerging powerhouses of licensing, posting growth rates that left the world's mature economies in the dust. But now the BRICs are going through hard times, as documented by findings from *TLL's Annual Licensing Business Survey.*

China Still Growing but at Slower Rates

For much of the past decade, mainland China and its growing middle class has consumed branded products at staggering rates. But while the future still remains bright, 2015 was a setback. China's 6.0% increase in licensed sales for the year, although more than 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. 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 that preys on consumers' lack of education.

Russia in a Downward Spiral

The former darling of western capitalists has become an international pariah with a radioactive economy. After 2014's 10% decline, the Russian market for licensed goods fell another 18.9% to $226 million in 2015. War in Ukraine led to EU and U.S. sanctions; oil prices fell; inflation was above 15%. Consumer confidence and the purchasing power of Russian consumers eroded.

"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 the stores. Even so, 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 of which, Masha and the Bear, has become a billion-dollar global entertainment property.

Brazil's Bubble Bursts

Brazil, the biggest market in Latin America, 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 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.

India Proves the Silver Lining

The one BRIC country that has defied the negative pattern is India. Already Asia'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, propelled by ecommerce, which has enabled the retail sector to thrive and overcome the logistical challenges posed by the country's undeveloped transportation infrastructure and high labor and real estate costs.

RETAIL SALES

Pokémon, Rio2016 Merchandise Ride Summer Sales Wave

The pop culture and sports events of the summer have created a groundswell of demand for related licensed merchandise. According to reports, Pokémon-related merchandise sales built through July and could be on track to remain high through the holiday season. Meanwhile, retailers selling Rio2016 merchandise are winning gold, several of them recently told *Forbes*.

Pokémon Go

According to Adobe Digital Insights, which tracks sales on the top 500 U.S. ecommerce sites, Pokémon-related merchandise sales rose 91% year-over-year even before Pokémon Go was released. In the month since, *Bloomberg* reported using the Adobe Digital Index, merch sales are up 105% from the same period last year. After the game's launch, licensed apparel sales rose about 85%, toy sales grew about double that, or 170%, and licensed electronics sales has a 200%-plus gain.

Pokémon Go continued to roll out in territories around the world through the first part of August, and if consumer interest in the 20-year-old brand continues, product sales could remain high through the back-to-school and holiday seasons, analysts believe. Among major retailers dealing in Pokémon paraphernalia, Build-A-Bear Workshop is currently sold out of special Pokémon toys in stores and online and GameStop said overall sales are up 100% in stores that are PokéStops or gyms. "Of course, our Pokémon merchandise is up significantly across the board," GameStop CEO Paul Raines told CNBC several weeks after the game's launch. "We're very happy to see all this excitement around Pokémon for what is traditionally a slower time of the year for gaming."

Some upcoming new product may help extend the demand for Pokémon:

- **Pokémon Go Plus**: Wearable accessory was originally scheduled for release in mid-July but has been delayed until September. The button-sized peripheral connects to player's smartphone with Bluetooth and allows the player to catch Pokémon with the push of a button without looking at the phone. Preorders priced at $35 sold out at GameStop, and the device, which can be clipped to clothing or worn as a bracelet, is now being offered by Amazon third party sellers for as much as $275.
- ***Pokémon Sun* and *Pokémon Moon***: Franchise's newest Nintendo 3DS games will be released Nov. 18.

Pokémon Go Debuts

July 6: U.S., Australia, New Zealand

July 13: Europe (began in Germany and the U.K. and rolled to more than 2 dozen countries over 10 days)

July 17: Canada

July 22: Japan

Rio2016

On the Olympics front, Jack Boyle, president of merchandising for Fanatics, the e-retailers of sports branded merchandise, told *Forbes* that sales of Rio2016 were running 50% ahead of the London 2012 Summer Olympics, the best Games for sales previously. Sales have been spurred by mobile shopping, and by what viewers have seen Olympic athletes wearing when they are out of uniform, as well as team-specific support, according to Fanatics. A specific Nike Team USA hat, for instance, became a top seller after some Team USA basketball players wore it in the stands as spectators of some live televised swimming competitions.

On site in Rio, *Forbes* reported, Olympics-related products including a Lego set to build Vinicius, the Rio2016 mascot, and the class Brazilian Havaianas flip-flops were selling briskly.

LICENSING AGREEMENTS

Pitfalls & Protections in Licensing Agreements

Before signing any licensing agreement, a licensee has to ensure they are completely covered. Here are the basic steps every manufacturer should take before putting pen to paper. In reviewing licensing agreements you must know what your critical business requirements are and whether the agreement that you are reviewing grants them to you or not. This is one of those difficult business decisions that executives are frequently called upon to make.

The Business Plan

When approaching a licensing deal, the licensee can only properly review the licensor's draft agreement *after* having developed a detailed business plan for the brand. The licensee's business plan is the most important element in negotiations, even though it is not part of the document itself.

Questions a licensee should ask include:

1. Does the agreement submitted by the licensor give us the rights that we need?
2. Is the cost what we expected?
3. How else might we get shafted?

Unfortunately, the last question can have many possible answers. If the licensee is not absolutely certain that the licensor's draft is consistent with its business plan, they should not sign. Timing is crucial—once the agreement is executed, the licensor is not obligated to entertain *any* requests for changes.

Standard License Agreements

When the licensor submits the first draft, it frequently will refer to that draft as "The Standard Agreement." In fact, the only thing that is "standard" about the licensor's draft is that it has been drafted to favor the licensor in every possible way. In fact, the brand owner *never* stops thinking up modifications to the document to make it *even more* favorable to themselves.

The use of the term "standard" is intended to discourage the licensee from trying to change any of the document's content. It would be unwise to accept this if there is anything unsavory or confusing in the agreement. In such instances, the licensee *must ask questions*. If the answers are not satisfying, the licensee must ask *more* questions. And if the licensor's representative can't or won't clarify terms, that is a sign that they are the wrong contact person or even the wrong company to deal with.

Case: Grant of Rights

The licensee's purpose in entering an agreement is to be able to use in its product line and related materials elements of the "Licensed Property." As a result, the definition of this term is of the essence of the deal. Let's assume that the licensor submits a first draft incorporating the following definition of the term:

Example definition for a "Licensed Property":
The Licensed Property consists of story lines, scripts, designs, artwork, characters, names, trademarks, logos of the motion picture entitled "Terminator," and the in-character names and likenesses of the principal performers as well as visual props and other elements contained within the Style Guide, to the full extent that Licensor shall have such rights.

Problems?

There are several problems with this "Grant" clause. The reference to the Style Guide is vague. Is there only one, or are there several editions? Has the licensee received and reviewed the document in order to determine whether it contains all of the visual, audible and textual elements that the business plan identifies as being necessary to the licensee? Even if the licensor has submitted this document, unless it is explicitly identified and stated to be incorporated into the license agreement, it will have no binding effect upon the licensor. One good way to handle this question would be by specifying the Style Guide by "version number" and attaching it as an exhibit to the contract.

Another major problem is the portion of the definition that limits the grant of rights for performers and other elements "to the full extent that licensor shall have such right." One might read this phrase as the licensor's assurance that it is not holding back any elements of the property. However, the more accurate interpretation is that the licensor is saying "If our attorneys didn't do their jobs well and failed to acquire the in-character names and likenesses of the principal performers or other elements, don't blame us. You're on your own."

A reasonable request by the licensee at the time of negotiating the agreement would be to request that the licensor make a determination whether or not it does, in fact, have the rights to make the grants in question. The language should either be revised to be unconditional or, if refused by the licensor, the licensee must assume that it will face problems if the talent in question challenges the licensee's rights to make use of the talent rights involved.

If the licensor will not make the grant unconditional, then the licensee must make the decision whether or not certain talent rights are absolutely essential to the business plan, and if they are, whether to proceed with the deal or not.

How much less would the "Terminator" property be worth to the licensee if it might not be able to use the likeness and characteristics of Arnold Schwarzenegger? The licensee may move forward and assume the risk or, look for another alternative.

Perhaps there is one particular actor in the motion picture whose in-character likeness and other characteristics are absolutely essential while that is not the case for the other talent rights. If so, the licensee might bargain for the unconditional use of that single actor's rights on an unconditional basis, and assume the risk with respect to the remaining talent.

Licensing Agreements is a TLL feature to help licensing professionals avoid contracting pitfalls. The feature is published with the permission and based on the writings of ***James M. Kipling****, a veteran licensing attorney in the Cincinnati offices of Dinsmore & Shohl LLP, contained in Mr. Kipling's Licensing 101 series which has been published continuously since 2002 in The Licensing Book. Mr. Kipling may be reached at (513) 977-8536, or jim.kipling@dinsmore.com.*

PUBLISHING

Cursed Child Blesses Retail

The numbers are in for the latest addition to J.K. Rowling's Wizarding World franchise, *Harry Potter and the Cursed Child: Parts 1 & 2*, and the book is strongly positioned to break records. The franchise will further grow with the upcoming film *Fantastic Beasts and Where to Find Them*, slated for release on Nov. 18, 2016. Although the Harry Potter licensing program has typically been small, compared to other blockbuster film properties, Warner Bros. has been ramping up licensing efforts with the expansion of the Wizarding World.

According to Nielsen BookScan, first week sales of the script book, released by Scholastic nationwide on July 31, were 2.5 million. Scholastic announced Cursed Child sold 3.3 million copies for the same time period in North America. Per Scholastic, the original Harry Potter series (published 1998–2007) sold more than 160 million copies in the U.S. and over 450 million worldwide. According to *TLL's Annual Licensing Business Survey*, retail sales of licensed publishing products were up 3.3% from 2014 to reach $3.65 billion in 2015. Sales for 2016 are expected to increase thanks to Cursed Child and other mega franchises.

The play is currently running in London's West End Palace Theatre and continues where the story left off in the Harry Potter series. Written by playwright Jack Thorne with input from original author J.K. Rowling and the play's director John Tiffany, the plot unfolds 19 years after the original series. And there is still more to come; the current book will be be replaced with a definitive edition to be published early 2017.

As reported by *Publishers Weekly*, Nielsen BookScan showed the mass merchandiser channel as the biggest winner for first week sales. While book clubs and retailers enjoyed a solid jump, mass merchants such as Walmart, accounted for 33% of sales. That share of is much higher than typical, with 17% cited as an example. But the channel is still struggling with book sales; even with the 40% increase in sales courtesy of *Cursed Child*, unit sales were down 4% through Aug. 7 compared to the same period in 2015.

Fantastic Beasts

All this is expected to further fuel the run-up to *Fantastic Beasts*. The film centers on Newt Scamander, the author of a Hogwarts textbook, and takes place in America in the 1920s. Slated for two sequels, the first will be released in 2018. See these and more upcoming films with licensing potential online (last updated Aug. 25, 2016).

Here are some of the latest additions to the Wizarding World program, which spans a robust publishing program, inspired-by apparel, toys, collectibles, housewares, stationery and more:

- All films in J.K. Rowling's Wizarding World franchise—the eight *Harry Potter* films as well as *Fantastic Beasts*—will have a new U.S. TV home on the USA and Syfy channels beginning July 2018 via NBCUniversal's multimillion dollar deal with Warner Bros. Disney has held TV rights. According to the *Wall Street Journal*, the deal is rumored to be as high as $250 million, which would make it one of the largest such deals in history.
- The Noble Collection extends their longstanding partnership with a new collection of merchandise based on *Fantastic Beasts*.
- Walker Books U.K. joins the *Fantastic Beasts* roster thanks to a sub-license agreement with Insight Editions. The publisher will roll out a line of interactive children's books in October simultaneously with Walker Books Australia. The company joins current master publishing partners Scholastic, HarperCollins and Insight Editions.

TOYS & GAMES

Summer or Not, Mattel and Hasbro Still Feeling Frozen

The extent to which the world's largest toy companies are reliant on entertainment/character licenses is crystal clear in a side-by-side Q2 comparison of giants Mattel and Hasbro. (We added Jakks Pacific to the chart for fun and to further illustrate the point).

Two years after the property stormed retail, both companies are still feeling the Frozen effect: Hasbro for the good—its second quarter girls' toy sales climbed 35% over the year earlier period—while Mattel was negatively hit. Mattel lost its Frozen license to Hasbro and second quarter sales of all girls' toys except for Barbie dove 60%. Moving into holiday 2016, Jakks Pacific has high hopes for its new large scale doll, Northern Lights Elsa, whose skirt lights up.

Disney's Frozen Northern Lights is an original story from the kingdom of Arendelle spanning a collection of books, animated shorts from the LEGO Group and new digital extensions.

Mattel will get its chance at payback, however. It recently won Universal's master toy license for Jurassic World from Hasbro. The change will take effect next year, leading up to the next Jurassic World theatrical installment in 2018.

In the meantime, Hasbro will continue working its boys' brands through products supporting the December theatrical release *Rogue One: A Star Wars Story*. Potentially more gender neutral are toys for *Trolls*, which DreamWorks Animation will release in November, and the second season of *Yo-Kai Watch* on Disney XD.

COMPARISON BETWEEN TOP TOY CO.'S PERFORMANCE, Q2 2016

PERIOD	MATTEL	HASBRO	JAKKS PACIFIC
Q2 performance: Overall	Worldwide net sales declined 3% vs. prior year to $957.3 million.	Worldwide net sales up 10% vs. prior year to $878.9 million.	Worldwide net sales up 8% vs. prior year to $141.0 million.
	Operating loss of $11.7 million, vs. operating income of 0.6 million in comparable 2015 period.	Operating profit increased 12% to $52.1 million.	Net loss narrowed to $4.4 million, from $5.7 million in the comparable 2015 period.
Q2 performance: Key product areas	Worldwide gross sales for Girls & Boys Brands were $553.7 million, down 8%.	Boys category revenues up 4% to $355.1 million, with strong sales of Nerf, Star Wars and Yo-Kai Watch brands.	N/A
	Barbie sales were up 23% due to the introduction of more diverse "Fashionistas" line, while sales for other girls' brands fell 60%.	Games category revenues up 8% to $227.7 million.	
	Fischer-Price Brands up 3%.	Girls category revenues up 35% to $172.3 million, due to addition of Disney Princess and Disney's Frozen brands (from Mattel), and growth from Baby Alive.	
	American Girl down 19%.	Preschool up 5% to $123.9 million on growth in Play-doh brand.	
Upcoming initiatives	American Girl's WellieWishers, a new content and doll brand is intended to appeal to younger girls ages 5 to 7.	Disney/Lucasfilm's Rogue One: A Star Wars Story and DreamWorks Animation's Trolls open in theaters in the fall, with toy tied to those brands.	The second half will bring Northern Lights Elsa, the next iteration of Jakks' large-scale Frozen dolls, with a light show on the doll's dress; and Princess Magical Wand Cinderella.
	Awarded worldwide master toy license (from Hasbro) for Jurassic World beginning in July 2017.	Yo-Kai Watch beginning its second season with 50 new episodes on Disney XD. Shows features new Hasbro products.	Plus new products from properties Teenage Mutant Ninja Turtles, Star Wars, DC Universe, Nintendo and Disney's new girl characters Elena and Moana.

SOURCE: The Licensing Letter

Who's News

CPLG undergoes a major restructure. **Maarten Weck**, current MD Northern Europe, takes on the additional responsibility of heading up CPLG U.K. **John Taylor** is elevated to Commercial Director U.K. and **Gemma Witts** to Retail & Marketing Director U.K. **Maria Gurrieri** adds Turkey and Greece to her overall remit to become MD Southern Europe. **Pau Pascual**, who currently manages Iberia, now also oversees the Middle East. **Stephen Gould**, current MD U.K., steps down.

DHX Brands increases its U.K. team: **Debbie Walker** is Brand Manager, leading initiatives for Twirlywoos and In the Night Garden; **Cheryl Brock** is Design Manager; **Alessia Foster** is Head Product Development; and **Holly Taylor** is Product Development Manager with a focus on apparel and soft lines development.

Nickelodeon promotes **Dion Vlachos** to EVP Retail Sales, Marketing & Publishing.

Macy's names **Richard Lennox** CMO.

Mary Lou Gardner is named EVP, Chief Merchandising Officer & CMO of Fred's Inc.

VF Corp. appoints **Jim Pisani** Global Brand President Timberland.

Target hires **Mark Tritton** as Chief Merchant.

The Brand Liaison hires **Laurie Smith** to lead special projects and **Katey Gabrielson** as a member of the company's senior management team and lead on new business initiatives.

Bonnier Publishing forms Bonnier Publishing USA. The new company will be headed by **Shimul Tolia**, current President of children's publisher Little Bee Books.

Jet.com co-founder **Marc Lore** will take over as President & CEO of Walmart ecommerce once the retailer closes on its Jet.com/Hayneedle acquisition.

Academy Sports + Outdoors names **Michelle J. Gloeckler** EVP, Chief Merchandising Officer & President of Academy Intl. Ltd.

hhgregg's new President & CEO **Robert Riesbeck** restructures the specialty retailer's executive team; **Sam Johnson** is promoted to Chief Retail Officer and **Chris Sutton** SVP Marketing.

Peter Knapp joins Park Literary & Media as Agent.

Adam Berg joins The Valen Group as VP Strategic Brand Licensing.

Vans appoints Doug Palladini to the position of Global Brand President.

Cathryn Summerhayes joins Curtis Brown as Agent.

Golden Bear promotes Barry Hughes to Managing Director.

Thomas Randrup leaves Revell as U.K. & Ireland Country Manager. **Jamie Mabbs** is promoted to Head Sales U.K. & Ireland.

Hasbro acquires Boulder Media; the animation studio now reports to **Stephen Davis**, Chief Content Officer & EVP.

LMCA promotes **Jane Ma** to the position of Brand Licensing Manger and hires **Andy Wang** as Director Brand Development in its Shanghai office. They report to **George Williams**, MD LMCA Asia.

MC Appliance, owner of the Magic Chef brand, appoints **Ted Kochowicz** Senior Licensing Manager.

Raf Simons is Chief Creative Officer of Calvin Klein, where he will oversee all brands, including Calvin Klein Home.

Jean-René Gougelet leads Casabella as CEO, succeeding founder **Bruce Kaminstein** who is now Executive Chairman.

Coolcore hires **David Ludd** as VP Global Marketing.

Literary agency The Cooke Agency's foreign rights branch, the Cooke Agency Intl., is sold to long-time employees **Suzanne Brandreth** and **Ron Eckel.**

Rob McMenemy leaves Egmont Publishing in his role as CEO Intl. In the U.K., **Sarah Bates** is promoted to Commercial Director, **Ali Dougal** moves up to Fiction Publishing Director and **John Packard** to Brands & Licensing Publishing Director.

Henna Riaz launches HRR Entertainment. The music and business management company will manage individuals in the music and entertainment industry, raise money to fund creative projects and develop new talent.

Andrew Martin is named SVP of St. Martin's Press.

Beanstalk has launched a new creative design arm in the form of Studio B @ Beanstalk, led by Senior Graphic Designer **Agata Shear**.

Simba Smoby U.K. welcomes **Jim Procter-Blain** as Head Marketing & Licensing.

GennComm hires **Allyson Frome** as Director Licensing & Business Development.

The National Football League appoints **David Thomson** to the role of Managing Director NFL Canada.

Jeff Gennette succeeds **Terry J. Lundgren** as CEO of Macy's.

Target hires **Mark Tritton** as Chief Merchant.

Lee Tappenden will succeed **Dirk Van De Berghe** as Walmart Canada's President & CEO on Aug. 15.

marblemedia taps **Donna MacNeil** as VP to oversee marketing initiatives.

Loftex hires **Julie Chisholm Polich** as its new VP Design.

Orchard Toys bolsters its in-house design team with **Kevin Dobson** as Graphic Designer.

Elena Giovinazzo is promoted to Senior Agent at Pippin Properties.

At Lion Forge Comics, **Geoff Gerber** takes over as President from **David Steward**, who will remain as Founder & Publisher. **Rich Johnson** joins as VP Sales, Marketing & Business Development; **Syndee Barwick** as Director Marketing & Product Development; **Mark Smylie** as Executive Editor; **Joseph Phillip Illidge** as Senior Editor; and **Devin Funches** as Sales & Marketing Manager.

Little, Brown Books for Young Readers has named **Jackie Engel** VP & Associate Publisher, replacing former Deputy Publisher **Andrew Smith**, who is now at Abrams.

Patricia Kelly is promoted to General Manager of the Oakland, CA office at Lonely Planet, in addition to her current role as Director Sales.

Following the sale of Corneliani to Investcorp, the Italian men's wear company appoints **Paolo Roviera** CEO.

The Global Organic Textile Standard (GOTS) names veteran auditor **Lori Wyman** as its new North American representative.

Patrick Byrne resumes his position as Overstock.com's CEO and **Saum Noursalehi** is promoted to President of the retail business unit.

Kathleen Merz is promoted to Acquisitions & Managing Editor at Wm. B. Eerdmans Publishing.

Elisabeth Kerr is promoted to Director Subsidiary Rights at W. W. Norton & Co.

Karen Gruenberg and **Dan Hurwitz** join kid's fitness brand GoNoodle in the newly created positions of CCO and Chief Revenue Officer, respectively.

HSN names **Judy Schmeling** President of the Cornerstone brand portfolio.

DC Entertainment's SVP Sales & Business Development **Derek Maddalena** and VP Marketing **Carol Roeder** have left the company. **John Cunningham** is promoted to SVP Sales & Trade Marketing and **Eddie Scannell** to VP Consumer Marketing.

Disney-owned Maker Studios lays off around 30 workers. Maker's most recent departures include former EVP Programming **Bonnie Pan**, who was named President of Endemol Beyond USA.

Samsung lets go of **John Pleasants**, who served as EVP Media Solution. He is replaced by **Yoon C. Lee**, an SVP at the company.

Loftex hires **Julie Chisholm Polich** as its new VP Design.

Janna Sendra joins Crypton as Director Fabric Design & Merchandising.

Warren Traeger leaves his role of Licensing Director at Icon Live.

Martin Markle departs CBC Television as Senior Director Children's Content.

Sears Canada's President & Chief Merchant, **Carrie Kirkman**, will depart at the end of Q2.

EXPERIENTIAL

With VR, Top Entertainment Properties Weave a Web Around Fans

Virtual reality technology is giving entertainment licensors a way to immerse fans more fully in their favorite franchises, with perennial properties including Shrek and Star Wars positioned to reach fans in three dimensions.

DreamWorks Animation has entered into a deal with visual effects house Digital Domain to produce VR experiences with popular DWA characters, including those from the worlds of Shrek and Kung Fu Panda. While the two companies have not divulged many details of their VR plans, the technology fits well with DWA's experiential licensing strategy. Location-based entertainment opportunities in such venues as shopping malls, cruise ships and theme parks are a key part of DWA's plan to leverage the value of its properties for recurring revenue streams and make some of its consumer products programs perennial, rather than focused on specific events such as movie releases. Last year, for instance, DWA opened Shrek's Adventure! London, an immersive storytelling attraction located in County Hall near the London Eye, and DreamWorks DreamPlace holiday photo studios in malls across the U.S. and London.

Meanwhile, Disney's Lucasfilm is moving the top entertainment/character property of 2015 into VR. Lucasfilm announced at the Star Wars Celebration in London that it is working on a virtual reality project that will focus on Darth Vader and reveal aspects of the villain's past. The project is being developed by Lucasfilm's ILMxLAB, a division that combines VFX house Industrial Light & Magic with Skywalker Sound and the Star Wars story group. At almost the same time as the Darth Vader VR announcement, Lucasfilm also released Trials on Tatooine, its first Star Wars light saber experience, for free on online game platform Steam VR. Called a cinematic virtual reality experiment, Trials on Tatooine works on the HTC Vive.

VR is a fledging market and it's still unclear how most consumers will eventually experience VR—whether it will be an in-home or out-of-home experience, for instance. Deloitte Global predicts that worldwide consumer spending on VR will reach $1 billion in 2016, driven initially by video gaming. It forecasts that about $700 million will be spent on hardware sales, and the remainder on content, with about 2.5 million VR headsets and 10 million game copies sold.

Other VR experiments by entertainment licensors have been launched for the in-home and out of home markets, including the location-based Sony Pictures' Ghostbusters: Dimension, a walk-through ghost hunting experience that is a joint effort with Madame Tussauds, Ghost Corps (a Columbia Pictures' Ghostbusters branding subsidiary) and immersive tech firm The Void. Ghostbusters: Dimension opened at Madame Tussauds New York in Times Square on July 1, two weeks before the movie reboot hit theaters.

Lionsgate has created multiple VR experiences for its Divergent franchise, including 2015's Insurgent—Shatter Reality, a four-minute VR promotion for film *The Divergent Series: Insurgent*, in partnership with Samsung Electronics America. The VR experience was location based in a handful of cities and available more widely as an app for Samsung's Gear VR. This year, a VR experience inspired by *The Divergent Series: Allegiant* has been available for HTC Vive.