

TLL THE LICENSING LETTER

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European Licensed Sales Up 1.8%; Western Europe Shines

The European territory experienced relatively flat growth (1.8%) with \$32.9 billion in licensed retail sales in 2016, according to *TLL's Annual Licensing Business Survey*. But several countries out-performed worldwide average growth of 2.7% in 2016.

The great East-West divide of recent years continued. It seems hard to believe that just a few years ago, Eastern Europe was the bright spot and Western Europe was in decline.

But in 2014, Western Europe turned around three years of decline to post 0.5% growth, following that with growth of 1.5% in 2015. The directionality continued in 2016 with 1.9% growth. As in the U.S., *Survey* respondents reported that entertainment/character drove sales in Western Europe.

Country-wise, the U.K. saw the highest gains at 3.6% (\$7.6 billion total sales). However, many respondents expressed concern for at least 1Q 2017, and perhaps beyond, in the U.K. as a result of Brexit. Fluctuating exchange rates, higher import costs, and copyright law changes are among the key Brexit worries. Based on preliminary reports, however, it is unlikely that the country will face steep declines in retail sales.

Europe's second leading economy for licensed sales, France, had a soft year with only 1.5% growth. It was so bad in France that some respondents even reported that many Disney properties underperformed expectations. Given its dominant market position, dips by Disney are bound to ripple and reduce retailers' confidence in less-proven licensed brands.

Germany, which led Western Europe with 3.6% growth in 2015, lost a little steam with 2.6% growth this year (\$5.5 billion). Licensed activity remains strong in categories like food & beverage, clothing, home goods, furniture, and personal care goods.

Ireland/Eire (3.1%), Spain (2.2%), and the Netherlands (1.8%) were the only other countries in Western Europe to show appreciable

growth—but considering how poorly they fared in years prior, it was actually a show of growth. Greece, which dramatically plunged 25.6% in 2015, bounced back with -5.0% growth in 2016. Having reached the bottom, Greece had nowhere to go but up.

For the past three years, the CEE region has been considered the “sick man of Europe.” Declines continued in 2016 but at a much reduced rate (1.1% vs. 8.7% in 2015).

Several countries in the territory, particularly the ones that are relatively insulated from the Russian economy, have been doing well. These include Poland (2.1% growth) and the Czech Republic (3.0%).

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TOYS & GAMES

Retailer's Top Toys of the 2017 Holiday Season

The top toy lists from Toys 'R' Us, Target, Amazon, and Walmart are out! Just over one-third of the top toys of the holiday season are licensed offerings. This year, we've identified which toys are licensed, their respective manufacturer, and which are exclusive to the retailer. See the complete list on pg. 7.

In 2016, retail sales of licensed toys/games grew 7.0% in 2016 to surpass \$8.0 billion for the U.S./Canada, according to *TLL's Annual Licensing Business Survey*. Last year, one of the brightest pockets of growth was collectibles and blind packs (which make up only a fraction of overall sales, around 5-10%). Increased interest in traditional toys/games like classic board games softened growth.

Amazon counts the smallest number of licensed toys and games on their list at just over 30% of offerings, while Toys 'R' Us, Target, and Walmart rack up approximately 40% each. Compared to last year, the showing isn't

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➡ Licensing Ledger

Mattel expands its relationship with **Fullscreen** to create Fullscreen Family, an initiative which will feature a massive family-focused collection of brand-safe channels for third-party advertisers on YouTube and other digital platforms like Facebook and Instagram. Through its increased digital ad spend, Mattel hopes to increase the amount of premium kids and family content by 61%, and reach an estimated 800 million monthly video viewers. The program kicks off with the Hot Wheels Digital Content Innovation Team, which will tap Fullscreen's top creators to make content for the boy-skewing brand's online fans. Mattel also continues to partner with **Tongal** to create content.

Illumination America completes its acquisition of Grom Holdings, which will now operate as **Grom Social Enterprises** and be comprised of four wholly owned subsidiaries. Grom Social will continue to operate as a social media network for children; it counts over 5 million total users in 200 countries.

ASIA-G-III Apparel Group partners with **Amlon Capital**, Fred Gehring's investment fund, to form a joint venture. The business will manufacture women's and men's apparel and accessories for the **DKNY** and **Donna Karan** brands in China, Macau, Hong Kong, and Taiwan. The venture will be funded with \$25 million of equity and G-III will own 49%, with Amlon retaining the remaining shares.

Spin Master expands its strategic partnership with **Alibaba** and its Tmall Group to bring core brands Hatchimals, Paw Patrol, Bunchems, and Sew Cool to China.

Toy manufacturer **Goliath Games** acquires **JAX Ltd.**, a company perhaps best known for the Sequence brand of games. JAX continues to operate out of Plymouth, Minn. and be led by the Levine family. Goliath is also a family-owned business, working with brands like Rummikub, Rubik's Cube, and Trionimos.

The Swedish video game industry saw revenue grow 950% since 2010 to reach \$1.54 billion (1.3 billion euros) in 2016, according to the 2017 Swedish Game Developer Index report. It's estimated that the entire industry is worth \$108

billion globally. The country is home to 287 game studios, including Microsoft, Ubisoft, Bethesda, Electronic Arts, and Rovio. Medium- and small-sized firms accounted for 25% of total revenues.

Casino and lottery service providers **Scientific Games** and International Game Technology (IGT) strike a "patent cross-licensing" deal. The two companies now share the technology and gaming systems powering their slot machines. IGT licenses include TV shows like *House of Cards*, *Wheel of Fortune*, *Jeopardy*, and *Sex and the City*.

Rovio partners with **Everton FC** in a multi-year deal that establishes its Angry Birds brand as an official shirt sleeve partner. The deal allows for collaborative content to be produced in the mobile game app as well as the manufacture of co-branded fan merchandise.

Mattel's Uno brings the first colorblind-friendly edition of its flagship card game to market thanks to a partnership with ColorADD, the creators of an internationally recognized colorblind alphabet. An estimated 350 million people globally and 13 million Americans are colorblind.

After announcing that it will pull its Disney and Pixar movies from **Netflix** when its contract ends in 2019, **Disney** CEO Bob Iger confirms that the company will also move its Star Wars and Marvel Cinematic Universe content from the streaming provider. Disney's own planned streaming service will launch late 2019.

Marvel is rolling out preschool content for the first time with *Marvel Super Hero Adventures!*—a short-form series complete with an in-house publishing program and consumer products line. The first season will include 10 short-form animated episodes (clocking in at 3.5 minutes) and focus on themes of friendship, heroism and helping others. On the merchandising side, toy partner **Hasbro** is joined by **Mad Engine**, **Jay Franco**, **GBG**, and **Jakks Pacific**. More partners and products will appear in October during Marvel Mania.

Disney is producing a new **Facebook/Instagram**-exclusive series, *Club Mickey Mouse*. Featuring a cast of eight influencers from its Maker Studios roster, it follows in the footsteps of other Disney Digital Network shows like *As Told By Emoji* and *Disney IRL*.

The **NFL Players Association** partners with **StatMuse** to launch a new voice app that enables fans to interact with individual players. Fans will be able to ask about scores, stats, and more from players like Peyton Manning, Jerry Rice, Le'Veon Bell, Devonta Freeman, Jay Ajayi, Drew Brees, Deion Sanders, Terrell Owens, David Johnson, and Scott Van Pelt. The NFLPA plans to add more voices to the roster.

AMC and **Mountain Dew** launch *The Walking Dead Encounter* augmented reality app. Fans can experience the show's iconic zombies and then share the interactions via social media. The deal sees *The Walking Dead* on-pack and in-store branding roll out on more than 100 million individual Mountain Dew products.

Fashion designer **Anna Sui**, AI marketing platform **Snaps**, and **Macy's** brand INC Intl. Concepts partner to launch an exclusive chatbot experience on **Facebook Messenger** to promote the designer's fall collection. Shoppers receive personalized notifications and will be able to buy products directly in the chat. The experience also features an exclusive emoji keyboard.



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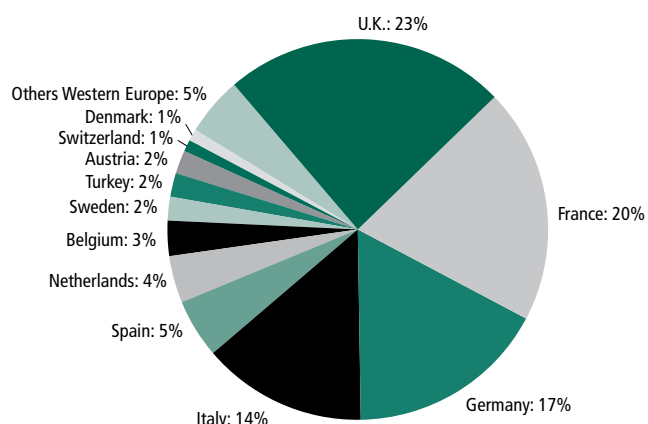
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European Licensed Sales Up 1.8%

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SHARE OF RETAIL SALES OF LICENSED MERCHANDISE, WESTERN EUROPE, 2016



Note: Because of space restrictions, "Others Western Europe" includes Finland, Portugal, Norway, Greece, Ireland/Eire, Iceland, and Luxembourg. These countries are tracked individually, and had less than \$400 million in retail sales of licensed products.

SOURCE: THE LICENSING LETTER

But the continued troubles of the territory's most dominant economy, Russia, pulled down overall performance. This year, Russia fell 5.6% to \$214 million.

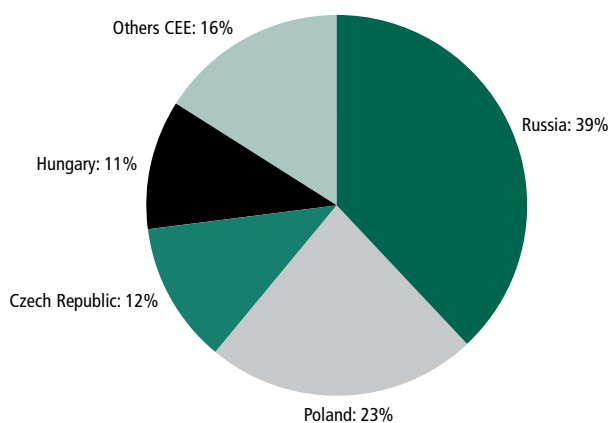
The U.K., France & Germany Lead Among Countries

The top 16 spots go to Western Europe, with the U.K. and France leading the pack for retail sales of licensed merchandise in 2016.

Property Types to Watch

While the major source of growth worldwide on the property type side of the equation was fueled by brands

SHARE OF RETAIL SALES OF LICENSED MERCHANDISE, CEE, 2016



SOURCE: THE LICENSING LETTER

from the U.S./Canada (almost 65% of the global market for licensed goods), European-based properties account for 15.5% of total share. Retail sales of European brands around the world grew 2.1% in 2016 compared to one year ago, and a whopping 6.5% compared to just five years previously.

European sports teams (i.e., football), kid's entertainment/character properties (especially preschool series like Peppa Pig and Masha and the Bear), mobile game apps (Angry Birds), and scripted TV Shows (Doctor Who) are some notable areas of growth.

TOP EUROPEAN COUNTRIES, RANKED BY TOTAL RETAIL SALES OF LICENSED MERCHANDISE, 2015-2016

RANK, 2016	COUNTRY	RETAIL SALES, 2016	RETAIL SALES, 2015	CHANGE, 2015-2016	SHARE OF EUROPEAN SALES, 2016
1	U.K.	\$7,593	\$7,329	3.6%	23.1%
2	France	\$6,521	\$6,425	1.5%	19.8%
3	Germany	\$5,507	\$5,368	2.6%	16.7%
4	Italy	\$4,390	\$4,368	0.5%	13.4%
5	Spain	\$1,716	\$1,679	2.2%	5.2%
6	Netherlands	\$1,340	\$1,316	1.8%	4.1%
7	Belgium	\$861	\$857	0.5%	2.6%
8	Sweden	\$764	\$753	1.5%	2.3%
9	Turkey	\$523	\$521	0.5%	1.6%
10	Austria	\$495	\$495	0.0%	1.5%
11	Switzerland	\$450	\$452	-0.5%	1.4%
12	Denmark	\$441	\$436	1.0%	1.3%
13	Finland	\$312	\$316	-1.2%	1.0%
14	Portugal	\$287	\$284	0.9%	0.9%
15	Norway	\$284	\$286	-1.0%	0.9%
16	Greece	\$220	\$232	-5.0%	0.7%
17	Russia	\$214	\$226	-5.6%	0.6%
18	Ireland/Eire	\$151	\$146	3.1%	0.5%
19	Poland	\$126	\$123	2.1%	0.4%
20	Czech Republic	\$63	\$62	3.0%	0.2%
21	Hungary	\$58	\$56	2.2%	0.2%
22	Iceland	\$40	\$39	2.5%	0.1%
23	Luxembourg	\$20	\$20	1.0%	0.1%
—	Others Western Europe	\$419	\$415	1.0%	1.3%
—	Others Central and Eastern Europe	\$86	\$85	1.0%	0.3%
—	Total Europe	\$32,881	\$32,291	1.8%	100.0%

Note: Numbers may not add up exactly due to rounding.

SOURCE: THE LICENSING LETTER

Continued on page 4

European dominance is particularly evident in luxury menswear. Prime retail space around the world is consistently stocked with Gucci, Emernegildo Zegna, Dior, Saint Laurent, and other Italian and French brands.

Football Dominates Sports Brands

Although tastes differ from country to country, football remains the world's most popular sport and a leading generator of licensed sales. Every major country in Europe has a top-rung soccer league, or a national version of the NFL. Although national teams tend to move the most merchandise in Olympic and World Cup years, products tied to the local clubs from these leagues are the true engines of growth.

But because they are so localized, club teams in Europe have smaller local markets than the American NFL, MLB,

or NBA teams. Fans are also wired differently. In the U.S., team loyalty exhibited by wearing the jersey is an inherent part of being a fan in good times, bad, and everything in-between. In Europe, by contrast, buying a team jersey is a kind of celebration of success.

Accordingly, European pro soccer licensing has been the historic domain of a handful of blue bloods who seem to win or at least contend for championships every year—for example, Manchester United, Réal Madrid, Barcelona FC, Liverpool, Bayern Munich, Paris St. Germain, and Juventus.

The true growth from these teams lies in targeting foreign fans, such as U.S. Hispanics and new territories in Asia and Africa that are getting a front-row seat to the 2018 World Cup.

RETAIL

The Future of Ecommerce is In-store

With traditional retail business models crashing down, and ecommerce on the rise, retailers will need the power of brands to thrive. Two dominant trends emerge when looking at the future of retail: retail-tainment and omnichannel.

Despite the rise of ecommerce, shoppers still prefer to see, touch, and *experience* products. According to Retail Dive, 62% of shoppers frequent physical stores for exactly that reason—among 18–24-year-olds, that figure jumps to 65% of shoppers. A separate study from Market Track shows that shoppers prefer to buy big-ticket items like cars, appliances, and jewelry in-store. The most preferred categories for online purchases were books, toys/games, and entertainment—that is, the types of goods that are frequently licensed.

Yet, there is something slightly off-kilter to the American experience about virtual stores like Tesco Homeplus' "fourth generation retail store," now counting 22 locations in South Korea. Busy shoppers can scan codes on strategically placed posters in locations like subway stations and receive a delivery that same day. The stores mostly stock groceries and staples, with some electronics offerings.

Thanks to that, brick-and-mortar stores won't disappear entirely—they will transform. By 2020, EKN research expects that the retail environment will be dominated by theme-based stores, fulfillment centers, and pop-up shops. But there is a clear risk to having all these moving parts—namely, ending up with a confused mess.

Both retail-tainment and omnichannel have been around for years, but retailers have always demarcated the line between marketing and merchandising. That view is slowly shifting.

Retail-tainment can take many forms; the most common installations in shops and malls are dedicated cafés, boutique shops, and demonstration areas. The idea is to

encourage shoppers to treat the store as a destination in and of itself and to linger longer when they're there. Disney's Imagination Shops, the official stores of sports leagues like the NFL and MLB, and Bass Pro Shops' Outdoor World locations (featuring bowling, archery ranges, miniature shooting, and ranges) are all examples of how much entertainment can fit into one themed shopping experience.

It should be noted that these are very controlled environments, with Disney (for example) controlling the products, marketing, employee training, and overall retail strategy through centralized leadership. When it comes to bringing the Disney experience to outside stores, the giant has struggled to recreate the magic. For brands that want to be part of the retail-tainment phenomenon, it is important to be as hands-on as possible with dedicated brand ambassadors supervising the experience.

In this way, physical stores become more like showrooms than warehouses. It makes fiscal sense; Walmart's internal research showed that 94% of its shoppers say their decisions are more likely to be influenced by in-store demos than advertisements. When Tony Rogers joined Walmart as its new CMO last year, he pushed suppliers aggressively to participate in in-store programs (but not at the expense of Walmart actually *paying* more for products).

Retailers typically offload their marketing expenses on licensors, licensees, and others who front the costs of TV and print advertising with CMFs and other contributions. Now, stores like Walmart are eschewing traditional advertising and asking brands to contribute to retail-tainment and other experiential marketing programs. Because the cost of such activations is negligible, retailers are incentivized to cycle through partners frequently, before they get stale.

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Target's Wonderland, a 16,000 sq. ft. pop-up store that debuted in the holiday 2015 season, is one example of what can be done. At the New York-based installation, visitors visited 10 holiday-themed displays (think giant Etch-A-Sketch, Disney, and LEGO statues). Consumers added toys to their shopping list by scanning a code with their RFID-tagged card. After completing the tour, shoppers checked out, paid, and picked up their packages. CMO Jeff Jones admitted that the retailer wasn't looking to actually set up these installations in every store, but rather to use the project as a launching point to develop "new shopping concepts." In an interview with *Fortune*, he added that shoppers wouldn't be interested in a "spectacle" when buying staples like diapers and underwear.

It's not hard to imagine the possibilities—even for staple goods. Rather than stacking products on shelves, retailers can set up displays, demonstrations, and hands-on areas for consumers to test-drive products. Even shopping for diapers can be fun. Wouldn't you want to try to recreate the "leak test" so often shown on TV ads? And the technology for implementing a pick-up system (or even better, free shipping) at the end of the shopping experience is already built into our mobile devices.

Omnichannel's Shopping Loop

So, if the store becomes a theme park, how are products actually getting into the hands of consumers? There are different types of models that fall under the omnichannel banner, including O2O (online-to-offline) and "click and mortar" selling (apparently distinct). According to Google, 85% of online shoppers start a purchase on one device and finish on another. The goal for B&M retailers is to get them to finish it *in-store*.

China's Bailian Group launched iBailian, an omnichannel e-commerce platform, in 2016 to help integrate its online and B&M businesses. We suspect that the final form of massive M&A deals like Amazon's purchase of Whole Foods will resemble their model. Bailian customers can place their order online, and the goods will dispatch either from a central warehouse or from a physical store, if it's closer. In this way, the store does double-duty as a destination shopping experience as well as a warehouse. The converse is also possible, with customers purchasing goods after browsing them in-store, and having them delivered straight to their homes, with no fuss.

THE PHYSICAL AND ONLINE
MARKETPLACES DON'T COMPLETE,
BUT RATHER WORK TOGETHER.

The "shopping loop" allows the conglomerate to coordinate publicity, promotion, and discount offers thanks to the detailed data collected from online shoppers (including preferences, purchasing power, and location). Targeted coupons sent directly to a consumer's mobile device can be used in-store or online, and can be weighed differently to encourage certain shopping habits (if the B&M shops are empty, offer a deeper discount on in-store purchases).

The physical and online marketplaces don't complete, but rather work together. It would be possible to track whether a store, underperforming in terms of physical on-site sales, actually delivers on target thanks to shoppers completing purchases on mobile devices.

The challenge for Bailian is in tweaking its online experience and marketing for shoppers based on their location (the buying habits of first-tier cities are different from second-tier cities). Retailers already understand regional differences, and the key might be to incorporate them into the online shopping experience as well.

Offers, promotions, and coupons are not enough on their own—brands and retailers must also create a sense of urgency. Quickly found that among consumers the key drivers behind coupon use are:

- ▶ Exclusivity—72% prefer exclusive offers that aren't available to everyone, even if they're lapsed buyers.
- ▶ Timeliness—60% find time sensitive offers motivating, while 46% find the same of limited quantity offers.
- ▶ Earnings—88% are more likely to redeem a reward or offer that they had to work for, with 73% stating that earned offers are more likely to be valuable than offers open to anyone.

Quickly's findings also show that frequent (as opposed to seasonal, one-off) loyalty campaigns, staggered over time and encompassing multiple stages, work best. In the same way, retailers are incentivized to make sure that retail-tainment initiatives are updated as frequently as store windows are today.

LICENSING LAW

Legal Updates

Hasbro and **DC Comics** are facing off in federal court over the right to market Bumblebee-branded toys. Hasbro alleges that Warner Bros.' DC Bumblebee could be confused with its Autobot Bumblebee from the Transformers universe. The toyco is seeking to block sales of an action figure from Mattel (part of the DC Super Hero Girls line) and a construction toy set from LEGO. Hasbro began selling Bumblebee toys in 1983 and building-block sets in 2011. In contrast, DC Comics and Warner Bros. first announced the DC Super Hero Girls franchise in April 2015 in partnership with Mattel. Hasbro had filed for a trademark on the "Bumblebee" name on July 15, 2015, and the trademark was registered on Dec. 22, 2015.

Meanwhile, a trial date is set in the fight over who owns the rights to Buck Rogers. On one side are the descendants of author Philip Francis **Nowlan**, who created the fictional space explorer in the 1920s. They face off with descendants of John Flint **Dille**, whose newspaper company once syndicated a Buck Rogers comic strip. Although the Dilles family had held registrations in the 1980s, because those are no longer valid, both sides must establish priority of use in the mark in a way sufficiently identifiable in the minds of the public. It is also possible that the Dilles had abandoned the mark at some point. Rather than consumer products licensing, what is truly at stake are the media rights. **NBCUniversal** currently has a script adapted from Nowlan's work, *Armageddon 2419 A.D.*

A recent judgment from the Ninth Circuit establishes that a non-exclusive licensing agent has no standing to sue

for copyright infringement. The court read the Copyright Act to read that only the "true owner" of a copyright has the right to sue, and that a licensor can't transfer this right to its non-exclusive agents. Although many agreements require agents and licensees to monitor the market for possible infringement, it will have to be up to the licensor to actually bring actions in court. The case is *DRK Photo v. McGraw-Hill Global Education Holdings, LLC*.

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Retailer's Top Toys of 2017

Continued from page 1

all that impressive—we estimate that almost half of the top toys for the 2016 holidays were licensed.

The most oft-mentioned licensed brands are Disney/Pixar's Cars 3 and Nickelodeon's Paw Patrol. Next up are Hatchimals, Barbie, Star Wars, and Doc McStuffins. Lastly, DC Super Friends and Disney Princess feature twice across the lists.

The honor of the most popular toy, however, goes to WowWee's Fingerlings. Among non-licensed offerings, top performers include Hasbro brands (Furreal Roarin' Tigers, Nerf, and Play Doh). Fisher-Price nabbed a spot on every list, sometimes appearing multiple times on the same list. LEGO's strength lies in its Star Wars and Boost Creative sets, but just two retailers included the company's toys on their lists. MGA's Project Mc2, Num Noms, and L.O.L. Surprise brands also had a strong performance.

The Nintendo Switch was the only console to make the lists this year, but that doesn't mean tech is dead. What is interesting to see this year is the proliferation of larger-than-life

play sets (complete with electronic elements) and interactive robot toys. These command the highest price tags, usually between \$100–200. In juxtaposition, small collectibles featured just as frequently and prominently.

Although Walmart's release did not specify which, if any, of its toys were exclusive to the retailer, Toys 'R' Us seems to have the highest share of exclusive offerings padding its top list (approximately 45%). Just two of Target's top toys were exclusives, and four of Amazon's.

Overall, Walmart has promised to stock more than 1,000 new toys, which includes more than 300 exclusives. The big box retailer said that about 25% of its toy stock will be exclusive. In comparison, Target will sell over 1,400 new and exclusive toys. Last year, Target introduced 1,800 new and exclusive toys in 2016, or up 15% more than in 2015, and the most it had ever sold.

Last year, most brick-and-mortar retailers reported disappointing results, blaming the rise of ecommerce and the price-gouging of big-box retailers.

SELECTED RETAILERS' TOP TOYS OF THE 2017 HOLIDAY SEASON

TOYS 'R' US (GEOFFREY'S TOP 20)	TARGET	AMAZON (TOP 25)	WALMART
<ul style="list-style-type: none"> ■ Baby So Sweet 16-Inch Nursery Doll‡ ■ Coco Interactive Guitar (Mattel)* ■ Doc McStuffins All-in-One Nursery (Just Play)* ■ Furreal Roarin' Ivory, the Playful Tiger (Hasbro)‡ ■ Glimmies Glimtern (Just Play)‡ ■ Hatchimals Surprise (Spin Master)* ■ Imaginext DC Super Friends Batbot Xtreme (Fisher-Price)* ■ L.O.L. Surprise Big Surprise (MGA) ■ Little Tikes 3-in-1 Sports Zone ■ NERF Rival Nemesis MXVII-10K Blaster (Hasbro) ■ Nintendo Switch with Gray Joy-Con ■ Of Dragons, Fairies, and Wizards Magical Fairy Wand Fairy Princess Fern (Cepia LLC) ■ Oonies Mega Starter Pack (Moose Toys)‡ ■ PAW Patrol Sea Patroller (Spin Master)* ■ Pikmi Pops Surprise! Jumbo Plush (Moose Toys)‡ ■ Power Rangers Ninja Steel Lion Fire Fortress Zord (Bandai)*‡ ■ Power Wheels Boomerang (Fisher-Price)‡ ■ Project Mc2 Smart Pixel Purse (MGA)* ■ Shimmer and Shine Magical Light-Up Genie Palace (Fisher-Price)‡ ■ WowWee Fingerlings (Unicorn Gigi)‡ 	<ul style="list-style-type: none"> ■ Barbie Dream Camper (Mattel)* ■ Beat Bugs Musical Submarine*‡ ■ BONK Board Game ■ Disney/Pixar Cars 3 Ultimate Florida Speedway (Mattel)* ■ Fisher-Price Laugh & Learn First Words Smart Puppy ■ Fisher-Price Think & Learn Teach 'n Tag Movi ■ Hatchimals Surprise* ■ Hot Wheels Super Ultimate Garage Playset* ■ Jetson Beam Light-Up Electric Scooter ■ Jetson Jupiter Light-Up Kick Scooter ■ L.O.L. Surprise! Big Surprise (MGA) ■ Laser X Two Player Laser Gaming Set ■ LEGO Friends Sunshine Catamaran ■ LEGO Star Wars BB-8 Build to Display* ■ Little Live Pets Smooch My Dream Kitten ■ Luvabella Interactive Baby Doll ■ MARVEL Spider-Man Homecoming Super Sense Spider-Man*‡ ■ Meccano Erector M.A.X. Robotic Interactive Toy with Artificial Intelligence ■ Melissa & Doug Deluxe Star Diner Restaurant ■ Moonlite – Bedtime Story Projector for Your Phone ■ My Little Pony: The Movie My Magical Princess Twilight Sparkle* ■ NERF Rival Phantom Corps Hera MXVII-1200 ■ Nintendo Switch ■ Operation: Escape Room Board Game ■ Our Generation Healthy Paws Vet Clinic ■ PAW Patrol Sea Patroller* ■ Playskool Friends Sesame Street Tickle Me Elmo* ■ Shopkins Shoppies Super Mall* ■ Star Wars Force Link BB-8 Mega Playset* 	<ul style="list-style-type: none"> ■ Automoblox Mini SC1 Chaos & HR5 Scorch ■ Baby Alive Sweet Tears Baby (Brunette) ■ Cars 3 Ultimate Florida Speedway Playset (Mattel)* ■ Cozmo ■ Disney Princess Dance Code Belle (Hasbro)*‡ ■ DropMix Music Gaming System ■ Enchantimals Panda Tree House Playset (Mattel)* ■ Fisher-Price Think & Learn Smart Cycle Toy‡ ■ FurReal Makers Proto Max‡ ■ FurReal Roarin' Tyler, the Playful Tiger (Hasbro) ■ Hape Pound & Tap Bench with Slide Out Xylophone ■ LEGO Boost Creative Toolbox ■ LEGO Ninjago Destiny's Bounty* ■ Melissa & Doug Star Diner Restaurant ■ Nerf Nitro FlashFury Chaos (Hasbro) ■ Osmo Genius Kit ■ Paw Patrol My Size Lookout Tower (Spin Master)* ■ PJ Masks Headquarters Playset (Just Play)* ■ Play-Doh Touch Shape to Life Studio (Hasbro) ■ Roller Coaster Challenge Logic & Building Game ■ Seedling Littles Galaxy Rocket Adventure Cape Kit ■ Soggy Doggy Board Game ■ Sphero Ultimate Lightning McQueen Vehicle* ■ Tegu Travel Pals Building-and-Stacking-Toys ■ WowWee Fingerlings Glitter with Blanket (Interactive Baby Monkey Rose)‡ 	<ul style="list-style-type: none"> ■ Adventure Force Light Command Light-Up Motorized Blaster‡ ■ Barbie Dream Horse and Doll (Mattel)* ■ Disney/Pixar Cars 3 Ultimate Florida Speedway (Mattel)* ■ Doc McStuffins All-in-One Nursery (Just Play)* ■ Dusty the Super Duper Garbage Truck ■ Fisher-Price Zoom 'n Crawl Monster ■ Frozen Sleigh*‡ ■ FurReal Friends Roarin' Tyler The Playful Tiger (Hasbro) ■ Hatchimals Surprise (Spin Master)* ■ Huffy Electric Green Machine Trike ■ Imaginext DC Super Friends Batman Batbot Xtreme* ■ L.O.L. Surprise Fizz Factory (MGA) ■ littleBits Star Wars Droid Inventor Kit* ■ Mayka Toy Block Tape ■ Mickey and the Roadster Racers Transforming Hot Rod Mickey (Fisher-Price)* ■ Monster Jam Grave Digger* ■ Nerf Rival Nemesis MXVII-10K (Hasbro) ■ New Bright Radio Control Tumblebee ■ Num Noms Nail Polish Maker (MGA) ■ PAW Patrol My Size Lookout Tower (Spin Master)* ■ Radio Control DashCam ■ RECOIL Starter Set ■ Soggy Doggy Board Game ■ VTech Pop-a-Balls Drop and Pop Ball Pit ■ WowWee Fingerlings

Note: *Licensed product. ‡Retailer exclusive.

SOURCE: THE LICENSING LETTER

Licensing News

Properties Available Or Recently Assigned, U.S.

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Care Bears	One of the world's most popular and endearing children's properties encouraging caring and sharing since 1982.	Food & beverage, health & beauty aids	Stu Seltzer, Seltzer Licensing Group
Crispy Green	Freeze-dried fruit snack brand made of only the finest fruits.	All	Chris Faust, Fastlane
Ivory Ella	Top trending cause-related apparel brand featuring a unique, iconic elephant, for young women, ages 14 to 22, proceeds to the global initiative to save the elephants.	All	Kim Winkeleer, Arabella Enterprises
Mississippi State University	Global, diversified research institution founded in 1878. Bulldogs varsity teams compete in about 15 sports and are members of the NCAA Division I Southeastern Conference.	All	Cory Moss, IMG College Licensing (form. Collegiate Licensing Co./CLC)
Romero Britto	Brazilian neo-pop artist combines cubism, pop art, and graffiti painting with vibrant colors and bold patterns as visual expressions of hope and happiness.	Consumer products	Marty Sumichrast, Level Brands
Snyder's of Hanover	No. 1 pretzel brand in the U.S.	Food & beverage	Ross Misher, Brand Central
Tapatio Hot Sauce	Authentic Mexican hot sauce sold since 1971.	Food & beverage, lifestyle merchandise	Ross Misher, Brand Central
This Old House	Pioneered the genre of home improvement television 35 yrs. ago. Includes a TV series, magazines, and digital platforms; reaches 30 million consumers monthly.	Household items, paint & accessories, smart home products, tools, workwear	Ross Misher, Brand Central

Licenses Recently Granted, U.S.

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
American Kennel Club	G Mason Group	Pet grooming products, vitamins	American Kennel Club
Anna Sui	Pottery Barn Kids/PBTeen div. Williams Sonoma	Home decor & furnishings	Anna Sui Corp.
Avalanche	Concept One Accessories	Bags, cold weather accessories, headwear, luggage	Avalanche Licensing/Avalanche Trading Co.
Betty Boop	Barbara Hirsh Design*	Baseball hats, denim jackets, hoodies, jeans, leather jackets, t-shirts	King Features Syndicate
	Event Network*	Ornaments	
	HYP/Hypnotic Hats*	Socks	
Bride of Frankenstein (The)	Dark Hall Mansion	Prints	Universal Brand Development
Caesars	International Game Technology (IGT)*	Lottery games	Caesars Entertainment Corp.
Corona	Blue Orange Pottery Inc.	Coolers	Joester Loria Group (JLG)
	Cartamundi U.S.A.	Trading cards	
	Catfish Calhoun dba. Calhoun Sportwear	Swimwear	
	Distribuidora Jiltex S.A. de C.V.	Housewares	
	East Coast Innovators dba ECI Furniture	Bar room furniture	
	Franco Manufacturing	Blankets, towels	
	International Innovation Co. USA Inc. div. Dutch Creative Brands	Housewares	
Lawson Hammock Co./Blue Ridge Camping Hammock	Hammocks		
Creature from the Black Lagoon (The)	Dark Hall Mansion	Prints	Universal Brand Development
CUBAVERA	Roma Industries	Cigar accessories, leather products	Perry Ellis Intl./PEI Licensing
Darren Gygi	Sweetwater Trading Co.	Pillows	MHS Licensing + Consulting
Dr. Seuss	Trend Lab	Canvas storage bins, totes	Dr. Seuss Enterprises L.P.
Dracula	Dark Hall Mansion	Prints	Universal Brand Development
DwellStudio	C.R. Gibson	Apparel (infants'), calendars, growth charts, keepsakes, memory books	DwellStudio div. Wayfair
Ellen Tracy	Cathay Home	Home goods	Sequential Brands Group
Farah Merhi	QVC	Bedding, candles, housewares, mirrors, rugs, throws	CPLG North America (Copyright Promotions Licensing Group)
Flamingo	International Game Technology (IGT)*	Lottery games	Caesars Entertainment Corp.
Frankenstein	Dark Hall Mansion	Prints	Universal Brand Development
Fresno State	Victory Tailgate	Tailgating games	California State University, Fresno
Harrah's	International Game Technology (IGT)*	Lottery games	Caesars Entertainment Corp.
Harry Potter	Pottery Barn Kids/PBTeen div. Williams Sonoma	Home decor	Warner Bros. Consumer Products
Hello Kitty	Fragrant Jewels	Bath products, candles	Sanrio
Horseshoe	International Game Technology (IGT)*	Lottery games	Caesars Entertainment Corp.
Invisible Man (The)	Dark Hall Mansion	Prints	Universal Brand Development
It	National Entertainment Collectibles Association (NECA)	Action figures	Warner Bros. Consumer Products

*Extension or renewal.

Continued on page 9

Licensing News *Continued from page 8*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
James Bond 007	Dynamite Entertainment	Comic books	MGM Consumer Products
L.O.L. Surprise!	Accessory Innovations	Accessories, apparel	MGA Entertainment
	Almar Sales	Party goods	
	Bulls I Toy	Novelties	
	H.E.R. Accessories	Accessories, apparel	
	Horizon Group USA	Activity sets, crafts, toys	
	Hybrid Promotions	Accessories, apparel	
	Innovative Designs	Stationery	
	Megatoys	Seasonal products	
	Taste Beauty	Health & beauty aids	
Labyrinth	BOOM! Entertainment/BOOM! Studios, Inc.	Graphic novels	Jim Henson Co.
Laundry by Shelli Segal	Avanti Linens	Towels	Perry Ellis Intl./PEI Licensing
Laura Ashley	Bon Ton Stores	Bath, bedding, home decor & furnishings	Laura Ashley
Lionel Richie	Baltic Linen	Bath, bedding	CAA-GBG Global Brand Management Group
Lucky Brand	Macy's	Bedding, decorative pillows, throws	Lucky Brand
Macbeth Collection	Concept One Accessories	Backpacks, bags, diaper bags, totes	Macbeth Collection
Mattel	Fullscreen	Digital content	Mattel
Maui & Sons	Z Supply LLC	Apparel (women's)	Maui & Sons
Minnie Driver	Hua Fung Corp. U.S.A.	Bedding	Artist & Brand
MLB	Camping World	Accessories, apparel, camping equipment, outdoor products, sporting goods	MLB Properties
Mummy (The, classic)	Dark Hall Mansion	Prints	Universal Brand Development
Olive Oyl	Event Network*	Souvenirs	King Features Syndicate
Outlander	Hot Topic	Apparel	Sony Pictures Consumer Products
	Torrid	Plus size apparel	
Paris Las Vegas	International Game Technology (IGT)*	Lottery games	Caesars Entertainment Corp.
PBS KIDS	Carson-Dellosa Publishing	Books, educational cards, learning aids (children's), workbooks	PBS
Peanuts	Cedar Fair Entertainment Co.*	Events & character appearances	Peanuts Worldwide div. Iconix Brand Group
Pokémon	TOMY	Mini figures, play sets	Pokémon Company Intl.
Popeye	Barbara Hirsh Design	Baseball hats, denim jackets, hoodies, jeans, leather jackets, t-shirts	King Features Syndicate
Popeye	Event Network*	Souvenirs	King Features Syndicate
Rainbow Rangers	Global Design Concepts	Bags, luggage	Genius Brands Intl.
	Handcraft Manufacturing	Underwear	
	Taste Beauty	Bath & beauty products	
Rick & Morty	Concept One Accessories	Accessories, bags, cold weather accessories, headwear, luggage	Cartoon Network Enterprises
Rio	International Game Technology (IGT)*	Lottery games	Caesars Entertainment Corp.
Royal Armed Forces	Breitling U.K.	Watches	WME/IMG Worldwide Licensing
Rubik's Cube	Colette	Apparel	SmileyWorld
Sealy	American Textile Co.	Bedding, comforters, mattress pads, pillows, sheets	Tempur Sealy Intl.
Star Trek	Loot Crate	Subscription service	CBS Consumer Products
	Quantum Mechanics/QMx	Collectibles	
Star Wars	A.T. Cross	Writing instruments	Disney Consumer Products
Steve Aoki	Authentic Brands Group (ABG)	Apparel	Dim Mak
Steven Universe	McFarlane Toys	Construction toys	Cartoon Network Enterprises
Terminator	GreenLight Collectibles	Die-cast collectibles, die-cast replica vehicles, figures	Creative Licensing Corp.
Thomas & Friends	Pottery Barn Kids/PBTeen div. Williams Sonoma	Accessories, home decor, toys	Mattel
Trina Turk	Revman Intl.	Bedding	Trina Turk
University of Montana	Big Sky Brewing	Beer	IMG College Licensing (form. Collegiate Licensing Co./CLC)
We Bare Bear	Concept One Accessories	Accessories, backpacks, cold weather accessories, headwear, luggage, patches	Cartoon Network Enterprises
Wolf Man (The)	Dark Hall Mansion	Prints	Universal Brand Development
Yogi Berra	Majestic Athletic div. VF	Apparel	Steiner Sports
	Mitchell & Ness Nostalgia Co.	Fleece, jerseys, pennants, t-shirts	
	National Emblem	Embroidered patches	
	New Era Cap	Hats	
	Panini America	Trading cards	
	WinCraft	Souvenirs	

*Extension or renewal.

Continued on page 10

International Properties Available or Recently Assigned

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
1-800 Flowers	Leading provider of gourmet food and floral gifts for all occasions for the past 40 years.	Candles, craft supplies, garden products, gardening accessories & supplies, home decor (North America)	James Slifer, Joester Loria Group (JLG)
Ann Telnaes	Reuben Award and Pulitzer Prize-winning editorial cartoons. Creates animated and static cartoons for the Washington Post.	All (Worldwide)	Gillian Murrell, Cartoonist Group Licensing
Dickey's Barbecue Pit	Largest barbecue restaurant chain in the U.S. for over 75 yrs.; nearly 600 locations in 44 states.	All (Worldwide)	Jeff Lotman, Global Icons
Electric Negro	Lifestyle brand and animated series that inspires the superhero in us all.	All (Worldwide)	Caryl Liebmann, Liebmann Licensing, Inc.
English Cream Tea Co. (The)	British tea brand putting a contemporary spin on something very traditional.	All, gifts & collectibles (Worldwide)	Richard Pink, Pink Key Consulting
Flossy and Jim	New colourful lifestyle brand that delivers fun and happiness to help kids feel good using bold iconic images and a comical feel good phrase.	All (Worldwide)	Denise Deane, Edutainment Licensing
Frank and Ernest	Comic strip in its 45th year of syndication stars two "Everyman" observers who are anything but ordinary.	Apparel & accessories, home decor & housewares, novelty & gift items, stationery & paper goods (Worldwide)	Gillian Murrell, Cartoonist Group Licensing
Geronimo Stilton	Best selling children's book series, the main character is a talking mouse living in New Mouse City on Mouse Island.	Back-to-school, bags, collectibles, fashion, toys & games (India)	Rohit Sobti, Brand Monk Licensing (BML)
Hairy Maclary & Friends	Favorite children's picture books for over 30 yrs., follows a dog named Hairy and his adventures in the company of his friends, with scenarios usually pitched against local cats.	All (U.K.)	Claire Potter, Metrostar Media Ltd.
Jake Paul	Social media, TV and film star, with nearly 10 million subscribers to his channel and averages 450 million views per month.	All (Worldwide)	Ross Misher, Brand Central
Jay & Silent Bob Universe	Among Hollywood's successful duo's, over 10 million active social media followers. Kevin Smith's worldwide aggregate box office nearly \$1 billion.	All (Worldwide)	Stuart Pollock, Segal Licensing
Joel Pett	Timely and timeless themes from award-winning editorial cartoonist; no frills drawing style, text, and art deliver impact not easily forgotten.	All (Worldwide)	Gillian Murrell, Cartoonist Group Licensing
Jungle Book (The)	Story of Mowgli; a boy raised by wolves in the jungle, his adventures meeting an array of animals, and the valuable life lessons learned on his journey of self-discovery.	All (North America) All (LATAM) All (Central America)	Danny Simon, Licensing Group (The) Luis Salazar Mourré, Compañía Panamericana de Licencias (CPL) CIMCA - Su Agencia Promocional Regional
Lionel Trains	American designer and importer of toy trains and model railroads for more than 100 years.	All (North America)	Lisa Marks, Lisa Marks Associates (LMA)
Marius	Iconic Norwegian pattern and brand, the most knitted pattern in Norway for almost 65 yrs.	All (Worldwide)	Gustav Melin, Bulls Licensing div. Bulls Press
Matt Wuerker	Editorial cartoonist and founding member of POLITICO pulls back the curtain on the political circus using his cartoons, illustrations, and caricatures.	All (Worldwide)	Gillian Murrell, Cartoonist Group Licensing
Naismith Memorial Basketball Hall of Fame	Promoting and preserving the game of basketball at every level; professional, collegiate and high school, for both men and women on the global stage.	All (Worldwide)	Ed Schauder, Steiner Sports
Numberblocks	Preschool TV show uses humour, inventive animation, delightful characters, and engaging storylines to teach children how numbers really work.	All (U.K.)	Clare Piggott, Larkhead Media
Outlander	Time-travelling drama set in Scotland and inspired by the novels by Diana Gabaldon.	All (U.K.)	Rob Wijeratna, Rocket Licensing
PepsiCo	Classic soft drink and lifestyle brands.	All (Europe)	Matthew Primack, WME/IMG Worldwide Licensing
philoSophie's	On-trend whimsical lifestyle brand with iconic character, Sophie, known for her red heart-shaped lips and distinctive illustrations, created by Joanna Alberti.	All (U.S., Canada)	Joan Packard Luks, ThinkTank Emporium
Pocoyo	Animated series stars a curious, fun-loving, friendly toddler; promotes values of tolerance, respect, love and loyalty.	All (LATAM)	Zé Henrique Caldas, VP Licensing & Distribution
Precious Moments	Most recognized inspirational brand in the world for nearly 40 years, with uplifting messages and distinctive characters.	Content licensing (Worldwide)	Gueran Ducoty, United Talent Agency (UTA)
Prima Maria	Lifestyle brand inspired by art of Maria Prymachenko. Naïve art mixes fancy floral designs with incredible beasts.	All (Worldwide)	Maria Strid, Art Ask Agency
Roald Dahl	British novelist, short story writer, and poet; 250+ million books sold worldwide.	All (North America)	Bob Traub, Brand Activation Consulting (BAC)
Signe Wilkinson	First female cartoonist Pulitzer Prize winner and editorial cartoonist for the Philadelphia Inquirer and Daily News.	All (Worldwide)	Gillian Murrell, Cartoonist Group Licensing
Speed Bump	Cartoons for Idea People by Dave Coverly. Evergreen themes often use animals for comic relief.	All (Worldwide)	Gillian Murrell, Cartoonist Group Licensing
Team 10	YouTube celebrities: Jake Paul, Ericka Costell, Nick Crompton, Chance & Anthony, Tessa Brooks, Justin Roberts, Chad Tepper, Alex Lange, Martinex twins, and Tristan Tales.	All (Worldwide)	Ross Misher, Brand Central
Valiant Entertainment	Superhero shop with 80 million issues sold; library incl. X-O Manowar, Bloodshot, Harbinger, Shadowman, Archer & Armstrong.	All (U.K.)	Rob Wijeratna, Rocket Licensing

*Extension or renewal.

Continued on page 11

Licensing News *Continued from page 10*

International Licenses Recently Granted

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
101 Dalmatians	Bonnier Publishing	Books, gift sets (U.K.)	Disney Consumer Products
Abraham Hunter	Plaid Enterprises	Paint-by-number kits (U.S., Canada)	MHS Licensing + Consulting
Accentuate	PlayMonster	Games (U.S., Canada)	Accentuate Games
Action Man	Royal Mail (The)/Royal Mail Group	Stamps (U.K.)	Hasbro
Aerosmith	Hybris Production AB	Accessories, apparel, gifts (Denmark, Finland, Iceland, Norway, Sweden)	Epic Rights
	Merch by Amazon	Accessories, apparel (Worldwide)	
Al Agnew	Vision Medical	Urns (U.S., Canada)	MHS Licensing + Consulting
Amylee Weeks	Prima Design	Bowls, platters, trays (U.S., Canada)	
Angry Birds Blues	YouTube/YouTube Kids div. Google	Digital content (Worldwide)	Rovio Entertainment
Archie	Mistiym Pty Ltd. tda Mitch Dowd Design	T-shirts (men's), t-shirts (women's) (Australia)	King Features Syndicate
Baroque Palace at Hampton Court	Hobbs London	Accessories, apparel (U.S., U.K.)	Historic Royal Palaces Enterprises Ltd.
Battersea Dogs & Cats Home	Posh Paws Intl. Ltd.	Plush & soft toys (U.K.)	Point.1888 (The)
Beast Quest	Maximum Games	Console games (Worldwide)	Coolabi Group
Betty Boop	Blues Clothing div. CWI Intl. (Holdings) Ltd.*	Fashion tops, nightwear, underwear (U.K., Ireland)	King Features Syndicate
	Branch Out Co., Ltd.*	Apparel (Japan, China, Taiwan)	
	Crux Corp. div. Kamio Japan Inc.	Accessories, badges, cases, cosmetic bags, notebooks, tote bags (Japan)	
	Innocenza S.A.*	Nightwear, swimwear (women's), tights, underwear (Argentina, Uruguay)	
	Inukai Towel Co., Ltd.	Bath towels, face cloths, washcloths (Japan)	
	Kurt S. Adler*	Ornaments (U.S., Canada)	
	Malu Holland B.V.*	Apparel (Benelux)	
	Marimo Craft Co.	Brushes, cosmetic bags, eyeglass cases, key chains, pencil cases (Japan)	
	Smart Prepaid	Gift cards (France)	
Beyblade Burst	Tany's Beauty S.A. De C.V.	Brushes, cosmetic accessories, cosmetic bags, makeup kits & appliances, manicure & pedicure sets & accessories (Mexico)	Sunrights
	TB International GmbH	Apparel (GAS)	
	Grund & Livres du Dragon d'Or div. Edi8/ groupe Editis	Books (France)	
	Kazé SAS div.VIZ Media Europe SARL	Graphic novels (France)	
Panini France S.A.		Magazines, sticker albums (France)	
Bigfoot 4x4	Kollectico	Bobbleheads (North America)	Bigfoot 4X4
Billy Gibbons	KnuckleBonz, Inc.	Limited edition collectibles (Worldwide)	Epic Rights
Bing	Fisher-Price*	Master toy (Worldwide)	Acamar Films
Brenda Pollriesz	North American Art	Wall decor (U.S., Canada)	MHS Licensing + Consulting
British Motor Heritage	Lucky Die Cast Products	Die-cast models (U.K.)	Licensing Management Intl.
	Nevermind Ltd.	Apparel (men's) (Japan)	
British Museum (The)	Alfilo Brands	Stationery (China)	British Museum Co. (The)
Captain Harlock	Hachette Livre	Diaries (France, French-speaking territories)	Toei Animation Europe S.A.S.
Chatty Charlie	Battersea Dogs and Cats Home	Events & character appearances (U.K.)	Hasbro
Chupa Chups	Fyodor Golan	Accessories (women's), apparel (women's) (Worldwide)	CPLG U.K. (Copyright Promotions Licensing Group)
Coco	IglooBooks	Books (U.K.)	Disney Consumer Products
Corbert Gauthier	North American Art	Wall decor (U.S., Canada)	MHS Licensing + Consulting
Cracké	Disney Channels Worldwide	Digital content (Japan)	Squeeze Studio Animation
Cranston Collection	Manual Woodworkers & Weavers (MWW)	Pillows, placemats, table cloths, table runners, throws (U.S., Canada)	MHS Licensing + Consulting
Crystal Maze (The)	PoeticGem/Poetic Brands Ltd.	Nightwear, t-shirts, underwear (U.K.)	Bulldog Licensing
Darren Gygi	LPG Greetings	Greeting cards (U.S., Canada)	MHS Licensing + Consulting
	Raz Imports	Christmas decor, ornaments, pillows (Worldwide)	
DC Comics Super Heroes	Zimpli Kids	Bath products (children's) (U.K.)	Warner Bros. Consumer Products
Deep (The)	DHX Media	Mobile game apps (Worldwide)	Technicolor
	Merlin Entertainments Group plc	Themed aquarium events (U.K., Germany)	
Deep Purple	Hybris Production AB	Accessories, apparel, gifts (Denmark, Finland, Iceland, Norway, Sweden)	Epic Rights
Deer Little Forest	AmayaSoft	Educational materials, interactive books (children's) (Russia, China, Turkey)	Icon Company Ltd.
Def Leppard	Hybris Production AB	Accessories, apparel, gifts (Denmark, Finland, Iceland, Norway, Sweden)	Epic Rights
DieHard	Dorcy International	Batteries, flashlights (U.S., Puerto Rico, Caribbean, LATAM)	Kmart/Sears Holdings
Disney Baby	Bonnier Publishing	Books, gift sets (U.K.)	Disney Consumer Products

*Extension or renewal.

Continued on page 12

Licensing News *Continued from page 11*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Disney Classic Characters	Bonnier Publishing	Books, gift sets (U.K.)	Disney Consumer Products
Disney Princess	Bonnier Publishing	Books, gift sets (U.K.)	
Early Man	Ancestors Group/Ancestors of Dover Ltd.	Collectibles, giftware & collectibles, pewter products, replica coins (U.K.)	Aardman Animations
Elf on the Shelf	Dreamtex Ltd.	Bedding, fleece blankets, home textiles (Europe)	Elf on the Shelf (The)/CCA&B
Elvisly Yours	Nemesis Now	Clocks, drinkware, figurines, key rings, lamps, novelties (U.K.)	Licensing Management Intl.
FC Barcelona	Kika Tech	Keyboard apps (Worldwide)	One Entertainment
Flash Gordon	TinyCo	Mobile game apps (Worldwide)	King Features Syndicate
Frida Kahlo	Ecell Global Ltd.	Electronic accessories (Worldwide)	Art Ask Agency
	Grupo Erik	Agendas, calendars, notebooks, paper goods, posters, stationery (Iberia)	
	Lladro U.S.A.	Porcelain collectibles, porcelain figurines (LATAM)	
Frozen	Bonnier Publishing	Books, gift sets (U.K.)	Disney Consumer Products
Fuzzy Felt	Royal Mail (The)/Royal Mail Group	Stamps (U.K.)	John Adams Leisure Ltd.
Game of Thrones	Titan Merchandise/Titan Entertainment	Blind packs (U.K.)	HBO
Gorjuss	Panini España	Sticker albums (Spain)	Santoro London/Santoro Licensing
Green Arrow	Sequart Organization	Books, e-books (Worldwide)	Warner Bros. Consumer Products
Hampton Court Palace	Hobbs London	Accessories, apparel (U.S., U.K.)	Historic Royal Palaces Enterprises Ltd.
Hard Rock	Ilyon Dynamics	Mobile games (Worldwide)	Hard Rock Intl.
Hatchimals	Alibaba Group	Toys (China)	Spin Master
Historic Royal Palaces	Hobbs London	Accessories, apparel (U.S., U.K.)	Historic Royal Palaces Enterprises Ltd.
Historic Royal Palaces: Crown Jewels (The)	Hobbs London	Apparel (U.S., U.K.)	
HIVESWAP	Viz Media	Comics, digital content, publishing (Worldwide)	What Pumpkin Studios/What Pumpkin Games
Homestuck	Viz Media	Comics, digital content, publishing (Worldwide)	
Hornby Dublo Trains	Royal Mail (The)/Royal Mail Group	Stamps (U.K.)	Hornby Hobbies
Hotel Transylvania franchise (Film & TV series)	Bendon Publishing Intl.	Books (children's) (Worldwide)	Sony Pictures Consumer Products
	Jazwares	Master toy (Worldwide)	
	Papercutz	Graphic novels (print & digital) (Worldwide)	
	Simon & Schuster Children's Publishing	Books (Worldwide)	
How to Train Your Dragon	Playmobil U.K.	Play sets (U.K.)	DreamWorks Animation
Imperial War Museum	Smart Fox/Koch Media Ltd.	Construction sets (Worldwide)	Imperial War Museums (IWM)
Incredibles 2 (The)	IglooBooks	Books (U.K.)	Disney Consumer Products
International Space Archives	H&A (Hall & Associates)	Accessories, cosmetics, toiletries (U.K.)	Licensing Management Intl.
	Marketing Licensed Products (MLP)	Accessories, apparel, bath linens (France)	
	Sahinler SAS	Accessories, apparel, outerwear, underwear (France)	
Jamie Oliver	Fiddes Payne	Grains, spices (U.K.)	CAA-GBG Global Brand Management Group
John Lennon	Merch by Amazon	Accessories, apparel (Worldwide)	Epic Rights
Judy Buswell	Manual Woodworkers & Weavers (MWW)	Pillows, runners (U.S., Canada)	MHS Licensing + Consulting
Jungle Book (The)	Bonnier Publishing	Books, gift sets (U.K.)	Disney Consumer Products
Kenmore	Cleva North America	Accessories, carpet cleaners, sweepers, vacuums (U.S., Canada)	Kmart/Sears Holdings
KISS	Dark Horse Comics	Adult coloring books (Worldwide)	Epic Rights
	Forever Collectibles	Construction toys, fidget spinners (U.S., Canada, U.K., Ireland)	
	Hybris Production AB	Accessories, apparel, gifts (Denmark, Finland, Iceland, Norway, Sweden)	
	Merch by Amazon	Accessories, apparel (Worldwide)	
	Sicem Intl. Srl	Apparel (adults'), apparel (children's) (Italy)	
Krispy Kreme	H&A (Hall & Associates)	Scented cosmetics (U.K.)	Krispy Kreme Doughnuts
L.O.L. Surprise!	Blueprint Collections	Stationery (U.K.)	MGA Entertainment
	Branded Clothing Intl. (BCI)	Apparel, nightwear, swimwear (U.K.)	
	Cardinal Industries	Games, puzzles (Europe)	
	Cardinal Industries	Activity sets, crafts, toys (U.S., Canada)	
	Danilo Promotions Ltd.	Calendars, greeting cards (U.K.)	
	DJ Murphy	Magazines (U.K.)	
	Dreamtex Ltd.	Home textiles (U.K.)	
	Franco Manufacturing	Home decor (U.S., Canada)	
	H&A (Hall & Associates)	Health & beauty aids (U.K.)	
	Handcraft Manufacturing	Accessories, apparel (U.S. Puerto Rico, U.S. Military Exchange Services)	
Little Brother Books	Annuals (U.K.)		

*Extension or renewal.

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Licensing News *Continued from page 12*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
L.O.L. Surprise!	MV Sports & Leisure	Accessories, bikes, scooters (U.K.)	MGA Entertainment
	Parragon Books Ltd.	Publishing (U.S., Canada, U.K., Ireland, ANZ, Asia-Pacific)	
	TDP Textiles	Nightwear, swimwear, underwear (U.K.)	
Love is...	IconLogin Ltd.	Lock screen apps (Worldwide)	J&M Brands
Madonna	Aristocrat Technologies	Slot machines (Worldwide)	Epic Rights
Mary Berry	I Just Love It/Gifts Hub	Bakeware, personalized products (U.K.)	KBJ Management
Maya the Bee	Giochi Preziosi	Master toy (Europe)	Studio 100 Animation SAS
Meccano	Royal Mail (The)/Royal Mail Group	Stamps (U.K.)	Spin Master
Mickey Mouse & Friends	Bonnier Publishing	Books, gift sets (U.K.)	Disney Consumer Products
Minecraft	J!NX	Blind box, collectibles, figures (U.S., Canada)	Microsoft
Miraculous: Tales of Ladybug & Cat Noir	Ferrero MSC GmbH & Co. KG	Chocolate, chocolate surprise eggs (Europe, LATAM)	Bulldog Licensing
Moonzy	Procter & Gamble	Diapers (Europe)	Melnitsa Animation Studio
Mountain Dew	TrueTimber Outdoors	Accessories, apparel (North America)	Joester Loria Group (JLG)
Mrs. Fields	Taste of Nature Inc./CandyASAP	Packaged foods (North America)	Mrs. Field's Famous Brands
NFL	Electronic Arts (EA)	Interactive games (Worldwide)	NFL
Nitro Circus	Hexbug div. Innovation First Intl.	Mobile apps, toys (North America)	Nitro Circus
Oggy & the Cockroaches	Playsoft	Mobile game apps (Worldwide)	Xilam Animation
Patrick Reid O'Brien	Sun 'N' Sand Accessories	Tote bags (U.S., Canada)	MHS Licensing + Consulting
Paw Patrol	Alibaba Group	Toys (China)	Spin Master
Peppa Pig	Amo Toys A/S	Toys (Nordics)	Plus Licens AB
	Barbo Toys	Toys (Nordics)	
	Björna ApS	Night lights (Nordics)	
	Clementoni S.p.A.	Games, puzzles (Nordics)	
	Hama Beads	Beads (Nordics)	
Peter Rabbit	Flamingo Land Ltd.	Theme park attractions (U.K.)	Silvergate Media
	Willows Activity Farm	Themed park attractions (U.K.)	
PJ Masks	Amscan Europe GmbH	Costumes (Nordics)	Plus Licens AB
	Björna ApS	Night lights (Nordics)	
	Clementoni S.p.A.	Games, puzzles (Nordics)	Entertainment One (eOne) U.K.
	Creaciones Guz, S.A. De C.V.	Apparel (Mexico)	
	E. Fashion Co, S.A. De C.V.	Apparel (Mexico)	
	Euromic A/S	Back-to-school (Nordics)	Plus Licens AB
	Fotorama Games & Toys (Mexico)	Games (Mexico)	Entertainment One (eOne) U.K.
	Importadora Grezon, S.A. de C.V.	Seasonal products (Mexico)	
	Novelty Corp De México, S.A. De C.V.	Games (Mexico)	Plus Licens AB
	Operadora Ruz/Grupo Ruz	Back-to-school (Mexico)	
	Operadora Ruz/Grupo Ruz	Dress-up (Mexico)	
	Procos S.A.	Partyware (Nordics)	
SkyBrands A/S	Apparel, textiles (Nordics)		
Stor S.L.	Tableware (Nordics)		
Popeye	Arguydal*	Cake accessories (France, selected French territories)	King Features Syndicate
	Bioworld Merchandising Europe*	Apparel (Benelux)	
	Bioworld Merchandising India Pvt. Ltd.	Apparel (India)	
Resident Evil 2	Steamforged Games	Board games (Worldwide)	Capcom U.S.A.
Robot Wars	Innovation First Intl./Innovation First Trading SARL	Master toy (Worldwide)	Licensing Link Ltd.
Rover	GIC*	Bicycle accessories, bicycles (Japan, Thailand)	Licensing Management Intl.
Royal Ceremonial Dress Collection (The)	Hobbs London	Apparel (U.S., U.K.)	Historic Royal Palaces Enterprises Ltd.
Royal Horticultural Society	Shruti Designs	Fashion accessories, gift products (U.K.)	Royal Horticultural Society/RHS Enterprises Ltd.
	Vantona Home	Bed linen, home textiles (U.K.)	
Saint Seiya	Hachette Livre	Diaries (France, French-speaking territories)	Toei Animation Europe S.A.S.
Savane	Roma Industries	Accessories, small leather goods (U.S., Canada)	Perry Ellis Intl./PEI Licensing
Sindy	Royal Mail (The)/Royal Mail Group	Stamps (U.K.)	Pedigree Dolls & Toys Ltd
South Park	Ubisoft	Mobile game apps (Android, iOS) (Worldwide)	Nickelodeon & Viacom Consumer Products (NVCP)

*Extension or renewal.

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Licensing News *Continued from page 13*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Space Racers	Funrise Toys	Master toy (Worldwide)	Carlin West Agency (CWA)
Spirograph	Royal Mail (The)/Royal Mail Group	Stamps (U.K.)	Hasbro
Stella McCartney	ISA Setta SpA	Lingerie, swimwear (U.S., Canada, U.K., Europe, Australia)	Stella McCartney
Stickle Bricks	Royal Mail (The)/Royal Mail Group	Stamps (U.K.)	Hasbro
Tatty Devine	Wild & Wolf	Note cards, notebooks, pens, stationery (U.K.)	Glue Creative Thinking
Terminator 2: Judgment Day	Rule & Make	Board games (Worldwide)	Creative Licensing Corp.
Terry Doughty	North American Art	Wall decor (U.S., Canada)	MHS Licensing + Consulting
Tiny Tusks	Bare Tree Media	Digital stickers (Worldwide)	Edutainment Licensing
True and the Rainbow Kingdom	Toy State Marketing (USA)	Master toy (North America)	Brand Central
Vans x Karl Lagerfeld	Vans	Accessories, apparel, footwear (Worldwide)	Karl Lagerfeld
Victoria Schultz	North American Art	Wall decor (U.S., Canada)	MHS Licensing + Consulting
Voltron Legendary Defender	Digital Domain	Video game (VR) (Worldwide)	DreamWorks Animation
W.Britain	Royal Mail (The)/Royal Mail Group	Stamps (U.K.)	Good Soldier (The) dba W.Britain Toy Soldier & Model Figure Co.
Wallace & Gromit	Ancestors Group/Ancestors of Dover Ltd.	Collectibles, giftware & collectibles, pewter products, replica coins (U.K.)	Aardman Animations
Willow	Design Objectives (docrafts)	Papercrafting (Worldwide)	Santoro London/Santoro Licensing
Year Without a Santa Clause (The)	Dark Hall Mansion	Prints (North America)	Warner Bros. Consumer Products
Yogi Berra	Moji	Emojicons (Worldwide)	Steiner Sports
	Rawlings Sporting Goods	Replica baseballs (North America)	
	Sony Computer Entertainment America	Video games (Worldwide)	

*Extension or renewal.



contacts & connections

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ENTERTAINMENT/CHARACTER

The Appeal Behind the Top \$100+ Million Brands

The top \$100 million entertainment/character brands aren't equal when it comes to consumer engagement, awareness, and appeal.

According to E-Poll Market Research's E-Score character survey for adults aged 13–49, while most of the top-selling properties on our list have what we could consider “universal appeal” across all age groups, some don't. Using their data, we've compiled a list of brands from the \$100 million list that have considerable room to grow, at least in some product categories.

Note that the list below isn't complete—44 entertainment/character properties made our latest list of brands that generated over \$100 million in retail sales of licensed merchandise in the U.S. and Canada. Those brands accounted for a total of \$41 billion in sales worldwide in 2015.

A high awareness and appeal score would suggest that a property has multi-generational appeal, and therefore, that it is more likely to succeed on shelves. Potential consumers include not only children, but the adults in their lives. Brands can target this demographic through adult-oriented consumer goods like fashion apparel and collectibles, but also through child- and infant-oriented goods.

The top three brands on the list—also the only properties to clear \$1 billion in the U.S./Canada alone—are indicative of the trend. Mickey Mouse, for example, generated a 72% awareness and 62% appeal score. For the purposes of our own analysis, *TLL* merged the E-Poll's data for the Mickey Mouse and Mickey & Friends character brands. Interestingly, the characters of Mickey & Friends had lower name awareness (just 25%) but the same appeal as the titular mouse alone.

Brands like Skylanders and Minecraft have relatively low combined name and image awareness for older consumers, at just 4% and 13%, respectively. These properties' performance is largely reliant on kids' efforts (presumably, in

TOP EUROPEAN COUNTRIES, RANKED BY TOTAL RETAIL SALES OF LICENSED MERCHANDISE, 2015–2016

RANK	PROPERTY	WOULD LIKE TO SEE MORE	INTEREST IN TV SHOW	INTEREST IN TOY OR ACTION FIGURE	INTEREST IN VIDEO GAME	INTEREST IN CLOTHING	GROWTH IN RETAIL SALES, 2014–2015
6	Batman*	28%	55%	41%	50%	43%	5%
6	Scooby-Doo	28%	57%	34%	39%	38%	N/A
7	Superman*	27%	51%	36%	41%	39%	5%
8	Spider-Man* [1]	26%	53%	38%	47%	39%	3%
9	Winnie the Pooh	25%	49%	34%	25%	37%	1%
10	Disney Princesses	23%	44%	35%	31%	36%	2%
11	Sesame Street	22%	47%	31%	25%	31%	-4%
11	Transformers	22%	47%	43%	43%	30%	4%
11	Disney Cars [2]	22%	44%	37%	36%	31%	-65%
11	Doc McStuffins	22%	53%	47%	31%	41%	2%
12	Mickey & Friends [3]	20%	46%	34%	33%	41%	-2%
12	Frozen	20%	39%	28%	27%	30%	13%
13	Teenage Mutant Ninja Turtles	18%	47%	34%	42%	36%	-1%
13	Minecraft	18%	25%	30%	50%	33%	32%
14	SpongeBob SquarePants	17%	45%	27%	31%	28%	18%
14	Monster High	17%	37%	30%	28%	26%	-24%
15	Power Rangers	15%	37%	26%	29%	23%	1%
16	Hello Kitty	13%	26%	29%	18%	31%	-2%
16	My Little Pony	13%	33%	28%	22%	28%	8%
17	Angry Birds	11%	26%	24%	39%	22%	-19%
18	Thomas & Friends	10%	38%	35%	20%	26%	2%
18	Skylanders	10%	35%	31%	42%	23%	-6%
19	Dora & Friends	7%	32%	22%	22%	21%	-2%
—	Overall Average**	30%	50%	31%	36%	31%	3%

Notes: *Score calculated from a 'Real' representation of the character; e.g., a still image from a live-action rather than an animated film.

**Character score average data compiled from 2,250+ character brands (E-Score). Average rate in growth of licensed retail sales based on the \$100 million brand list (TLL).

[1] Average of character scores for 'Real' and 'Spider-Man: Homecoming'.

[2] Average of character scores for 'Lightning McQueen' and 'Mater'.

[3] Average of character scores for 'Mickey & Friends' and 'Mickey Mouse'.

SOURCE: E-Score Character brand poll; conducted monthly among a representative sample of 1,500 respondents ages 13–49, E-Poll Market Research, THE LICENSING LETTER.

Continued on page 20

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pressuring parents to buy a toy). For example, E-Score’s appeal score among younger children (6–12 years-old) for Minecraft is 83%, compared to 34% for adults. Interestingly, the two brands also have some of the highest scores on the list for negative appeal (respondents indicating “dislike” or “dislike a lot”); 28% of adults reacted negatively to Skylanders and 18% to Minecraft. Why? E-Poll identified that the two brands share one unique attribute—“boring.” (For the 6–12 year-old group, only 5% and 6% react negatively to Skylanders and Minecraft, respectively.)

The most universally well-liked brand? Monsters University, boasting a mere 1% negative versus 75% positive appeal. Compared to the average awareness score across all brands E-Poll tracks (21%), the brand is relatively well-known at 32%.

E-Poll also asks whether respondents would like to see more of a brand in their lives, based on their current level of engagement. The numbers can be read to imply a consumer is looking forward to a new toy release as well as expressing interest in buying a toy already at market.

The data has some surprises. While we might have expected the top two brands (Avengers at 47% interest and Star Wars at 39%, overall) to show up near the top based on their growth in retail sales, the rest of the top five is rounded out by older properties whose licensing programs have slowed down like Looney Tunes (38% interest), Peanuts (30%), and Monsters University (29%).

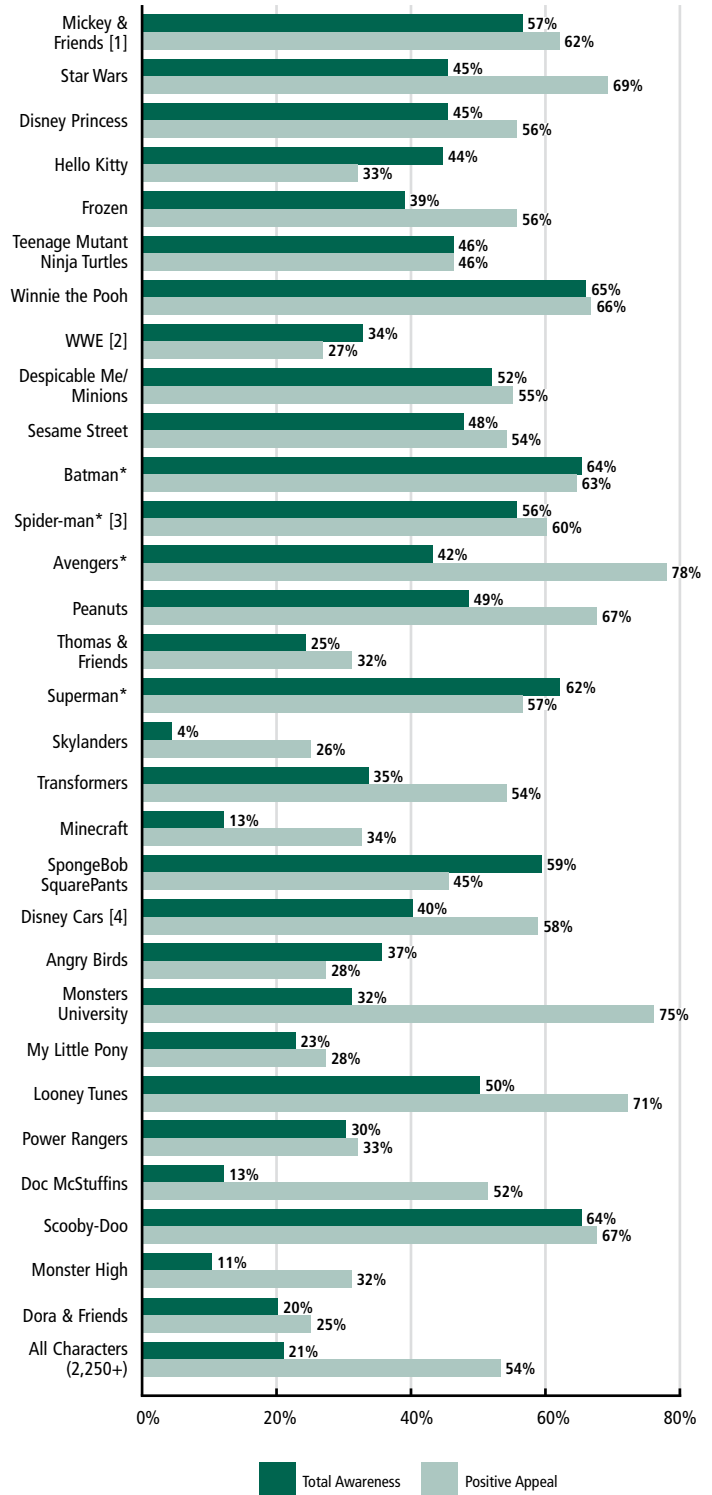
The fastest-growing properties in 2015—not counting the three new additions to the list—were Minions (93% growth in licensed retail sales), Avengers (54%), Minecraft (32%), Star Wars (23%), and WWE (22%, not included on pg. 19 due to unavailable data). These properties generally rank higher in interest thanks to recent expansions in content (films and TV shows) as well as merchandise (toy and apparel lines).

Other brands like Looney Toons (1% growth; 38% interest) and Monster University (-51% growth; 29% interest) tell a different story. It could be that as licensors have scaled back their programs, consumers have grown nostalgic for merchandise. Alternatively, interest might not correlate directly into increased licensed sales—consumers might be more interested in seeing their favorite characters on TV than on a toothbrush. One thing is clear—these brands are not one-hit wonders, but here to stay.

But sometimes things are just as they appear. For example, retail sales for licensed Dora & Friends consumer products contracted 2% in 2015, just 7% of E-Poll respondents are interested in seeing more, and a whopping 18% exhibited negative appeal towards the character brand.

Low interest may simply be a gauge of oversaturation. Consumers aren’t interested in more Dora, Skylanders, or Thomas & Friends merchandise and content because they already have it. In predicting the success of a licensed program, this might hint at flat or slightly decreased growth

AWARENESS & APPEAL OF THE TOP 30 ENTERTAINMENT/CHARACTER BRANDS, AGES 13–49
As Ranked by Retail Sales of Licensed Merchandise, U.S. & Canada



Notes: *Score calculated from a ‘Real’ representation of the character; e.g., a still image from a live-action rather than an animated film.
 [1] Average of character scores for ‘Mickey & Friends’ and ‘Mickey Mouse’.
 [2] WWE data sourced from E-Score Brand survey.
 [3] Average of character scores for ‘Real’ and ‘Spider-Man: Homecoming’.
 [4] Average of character scores for ‘Lightning McQueen’ and ‘Mater’.
SOURCE: E-Score Character brand poll, conducted monthly among a representative sample of 1,500 respondents ages 13–49, E-Poll Market Research, THE LICENSING LETTER.

in retail sales. Indeed, the lowest entries on the list have programs which have steadily contracted over the years.

The brands with the most interest in toys or action figures are Doc McStuffins (47%), the Avengers (46%), and

Batman (41%). The Avengers leads for interest in a video game at 57%, followed by Batman and Star Wars with 50% each. The order is the same for interest in clothing with the Avengers leading at 45% interest, followed by Batman and Star Wars at 43% each.

RETAIL

Spotlight: K-Food in America

While Korean food (K-food) is just a small part of the specialty foods industry, it's the touchpoint for many questions about branding, such as: What does it take to market an entire industry? A country?

American retail sales of specialty foods reached \$99 billion in 2016, and make up 15% of all retail food sales, according to the Specialty Food Industry. In an attempt to grab even more of that share, the Korea Agro-Trade Center New York (aT Center) recently hosted K-FOOD FAIR New York. The show was launched in order to introduce American buyers to South Korean manufacturers, and the organizers hope to build relationships. We had the chance to sit down with the staff of aT Center, including President Kwang-Jin Kim.

To begin, keep in mind that the Korean food market is relatively immature. In the U.S., retail sales activity is concentrated in areas with high Asian and Hispanic populations. But the aT Center, a government-invested enterprise responsible for the marketing and trade of its country's agriculture and food industry, is playing the long game. The agency is just one part of a greater strategy of "nation branding"; the country's first attempt to create Korea's national brand began only in 2002.

The aT Center's primary target? Millennials. When it comes to food and beverage brands, adults aged roughly between 20–36 are one of the easiest demographics to market and sell to. They are interested in trying new, exciting flavors; trying healthy and sustainable ready-to-eat foods; and have even invested in Korean culture through the soaring popularity of K-Pop stars and TV shows. And the best part? Once they incorporate a food/beverage into their diets, they won't disengage for decades to come. The immense staying power of food/beverage goods is part of the reason that among all the product categories we track, licensing deals for those goods tend to be the longest (albeit, with some of the lowest royalty rates).

The history of branding food and beverage products in Korea is quite different than that in the U.S. Several years ago, a government-led initiative gave birth to a "grouped" branding scheme for certain Korean foods. A particular product, like kimchi or seaweed, would have its own character brand—no matter what company made it, all kimchi would have the same imagery. The idea would be to create a uniform impression among foreign buyers and encourage general consumer recognition and goodwill towards Korean food exports as a whole. But companies rebelled,

preferring to have their own, distinct branding.

As a side effect, it is difficult today to find "character" branding as we know it for food/beverage products. Except for the largest conglomerates, most small- and mid-sized companies market their products first, and brand second. Typical branding focuses around the area where a product came from; for example, a region famous for its distinctive kimchi recipe. Only in the last 10 years have companies started "star marketing," or launching advertising campaigns with famous actor/actresses, music stars, or comedians to help distinguish their products. The implication was that partnerships with other brands would be far off.

But the "star marketing" strategy works, and it is one of the most impactful ways that K-food has become popular in the U.S. For example, First Lady Michelle Obama brought kimchi into our national consciousness. On TV, social media, and on the street in food trucks, chefs began using Korean-inspired ingredients like chili paste and seaweed. And K-food began showing up in subscription and ready-made boxes from companies like Blue Apron and Try The World.

Despite that, Vietnam and Thailand food/beverage exports into the U.S. outpace those from South Korea, according to the aT Center. We suspect basic staples like jasmine rice are singlehandedly skewing the scale, but the statistic itself is surprising. Our theory? Americans don't plan a vacation to Jeju Island (unfortunately for Lionsgate's 1.3 million sq. ft. new theme park), but the smaller, Southeast Asian countries are prime destinations. Their image is more sensual, less academic. No matter how widespread K-pop and entertainment are, there remains some distance. Obviously, that is breaking down with time. But licensing is one of the most intimate forms of marketing there is—and for a consumer to eat or drink your products requires a higher level of trust and understanding.

In sum, the biggest takeaway for any brand is: No matter what you're selling, you have to translate it well. One of the most common refrains we hear from licensing executives working with TV entertainment properties hailing from overseas is the need to explain the show's concept, meaning, and target market to retailers, even when they already have a dedicated audience. Their story is not unique; every brand ambassador has to examine their brand critically and be able to articulate what makes it special. But when it comes to licensing food & beverages, things get more personal.

RETAIL

Chapter 11 is the Best Thing to Happen to TRU

In the face of a \$400 million debt due in 2018, Toys 'R' Us retained a law firm to help restructure its financial obligations. Then, the specialty toy chain filed for Chapter 11 bankruptcy.

The announcement comes at a relatively good time, giving vendors and other stakeholders time to react. TRU has lined up a \$3.1 billion bankruptcy loan, and received court approval to begin using roughly \$1 billion toward retiring its bank debt, paying vendors to keep shipments coming, and paying employees throughout the end of the year.

TRU heavily relies on its holiday sales to remain solvent; last year, same-store sales dipped 2.5% domestically and 4.9% internationally. In response, the company laid off around 150 of its corporate staff (or around 10–15% of its total corporate workforce).

The potential restructuring would help TRU simplify its capital structure—the complexity of having three institutional owners (KKR, Bain, and Vornado) can't be underestimated—and potentially get out of expensive, oversized leases. TRU's troubles began when the three firms initiated a \$7.5 billion leveraged buyout more than a decade ago to take the company private. While slightly reduced by now, the debt hasn't gone away—at the end of Q1 2017, TRU's net debt was 7.8x its earnings. Over the years, TRU is estimated to have paid out nearly \$6 billion in total interest payments, including \$910 million in 2016 and 2017. That means that the retailer had little left over to count as profits; virtually all excess cash was marked for reinvestment.

TRU continues to blame the shift towards the rise of ecommerce and the price-gouging of big-box retailers for

falling sales, which have also negatively impacted other specialty brick-and-mortar sellers. This summer, an activist investor urged Barnes & Noble to sell itself in a deal mirroring Amazon's acquisition of Whole Foods. The bookseller's own same-store holiday sales fell 9.1% in 2016. (But more closures don't seem to be in B&N's future; CEO Demos Parneros hopes that in fiscal 2019, starting May 2018, the company will start to grow its store count after years of closures.) Other specialty B&M retailers that have recently emerged from bankruptcy include Payless ShoeSource (which closed 700 U.S. stores) and Gymboree (350 closures).

In court papers, CEO David Brandon stated that TRU “has fallen behind some of its primary competitors on various fronts, including with regard to general upkeep and the condition of our stores, our inability to provide expedited shipping options, and our lack of a subscription-based delivery service.”

But despite the limited opportunity to invest in itself, TRU is doing quite well in comparison with other B&Ms. According to TTPM, “If they didn't have the debt, they would be making \$500 to \$600 million a year in profit.”

While ratings agencies rushing to cut their credit ratings for the retailer, TRU appears dedicated to maintaining solid relationships with its vendors and paying them what's due (right now, at least). Holiday stock is coming in, and there are no current plans to sell stores. And although the retailer hasn't announced its plans for financing 2018 operations, its partners will have a lot of leverage in negotiating deals and planning for next year's holiday season.

TOYS/GAMES

The Name of the Toy Game is STREAM

In kids' tech toys, STREAM is the top trend of the year—to be more specific, programming and engineering. But while many toys are meant for a younger set, the price point is relatively high compared to the pure-play offerings topping retailer's top holiday toy lists.

We're featuring some of the up-and-coming tech innovations in toys featured at the Kids' & Family Tech Expo in New York. Visit www.thelicensingletter.com to view the full gallery of images.

Exhibitors featured everything from sturdy kid's lap-top/tablets (with a detachable screen) to computer kits that kids can build and program themselves. Tanoshi's 2-in-1 computer retails for around \$200, while kids can make their own from Kano for \$150–250.

Naturally, the bulk of new toys were robotics of various shapes and sizes. For the younger pre-school set, the emphasis was on old-fashioned wooden block play, with a twist. Kids can program a robot to move, speak, and light up depending on the sequence of blocks they stack.

Examples include no-screen-required offerings include those from Primo Toys and KinderLab Robotics.

Code isn't the only thing that requires sequencing, and companies like Technology Will Save Us and Pai Technology also showed off circuit conductors.

Older kids' toys are more intricate and introduce app-connected elements where they code on-screen. LEGO Boost actually made it onto top toy lists, but it will also compete with similar offerings like Little Robot Friends.

And then there were the “toys” actually designed for parents—as teaching aids or monitors:

- ▶ Urban Hello debuted a combination sleep monitor/ alarm clock meant to age with a child in much the same way Mattel's Aristotele is designed to do.
- ▶ A sticker chart for the digital age, Kudo Bands combine the concept of charm bracelets with a behavioral app.
- ▶ Bowhead Technology showed off a water bottle with a built-in *Tamagotchi*-esque display, meant to encourage kids to drink their water.



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Who's News

Disney's new President Business Operations EMEA is **Rebecca Campbell**, replacing **Diego Lerner**. Lerner takes up an unspecified international role. In the U.S., Disney Channel hires **Dina Hillier** as VP Original Series.

Universal Brand Development welcomes **Ben Braun** as CFO and **Santiago Capdepon** as SVP & Head Operations Brand Development.

Mattel appoints **Joseph Euteneuer** as CFO; **Sven Gerjets** as CTO; **Amy Thompson** as Chief People Officer; and **Nancy Elder** as the toyco's new Chief Communication Officer.

Natalie Harvey is CPLG's new Retail & Marketing Director.

Studio 100 and m4e begin reorganize: **Peter Kleinschmidt** now manages all international licensing and merchandising business; **Esra Sahin** is Intl. Licensing Manager; and **Sara Acquier** is Head Licensing France.

Pavol Vano is now CEE General Manager of Spin Master.

Acamar Films welcomes **Sandra Vauthier-Cellier** as its new CCO; **Eroulla Constantine** as Head Sales; and **Ben Taylor** as Sales Coordinator.

The Point.1888 appoints **Bethan Garton** as Retail & Brand Director; **Rebecca Cross** as Product Development Manager; **George Birtchnell** as Senior Brand Manager; and **Jack Allen** as Senior Brand Executive.

Stewart Middleton departs from his role as MD at Jumbo Games. **Steve Washbourne** is promoted to U.K. Sales Director.

CMON promotes **Jules Vautour** to COO.

UFC names **Paul Asencio** SVP Global Partnerships.

Lionsgate promotes **Kerry Phelan** to President Global Franchise Management.

Nickelodeon names **Jose L. Castro** as SVP Softlines.

Tony Weisman joins Dunkin' Donuts as its new U.S. CMO.

LMCA adds **Reginald Thornton** as Director Brand Licensing.

Penguin Random House promotes **Alison Rich** to SVP Publishing Development & Author Platforms and **Rachael Perriello** to Director Licensing & Business Development.

Ed Wells joins Sesame Workshop as Head Intl. Media & Education.

GP Flair welcomes **Emmanuelle Cadet** as Head Marketing.

June DeFabio joins Iconix as Head Home & Women's Brands.

Julia Jensen is SVP, Publicity & Communications for Warner Bros. Entertainment Consumer Products. In the U.K. & Ireland, **Rachel Wakley** now serves as the company's General Manager.

National Geographic Partners hires **Maria Maranesi** as its new VP Consumer Products & Experiences Europe & Africa.

Centa IP hires **Gail Mitchell** as VP Asia-Pacific, located in Sydney; **Rebekah Belzer** as VP Sales & Licensing (The Americas) and **Nick Cooke** as VP Sales & Licensing (Europe).

Tony Hicks takes on the role of CEO at Vivid Toy Group.

Epoch Making Toys adds **John Briggs** as Senior National Account Manager for the U.K. and Ireland.

Wow Unlimited Media appoints **John Vandervelde** as EVP, Corporate Secretary & CFO1. **Christine Read**, who served as Interim CFO, will remain VP Finance.

Netflix hiree **Melissa Cobb** as VP Kids & Family Content.

Pete Hawley is the new President & CEO of Telltale Games. Hawley replaces Co-founder **Dan Connors**, who is stepping back to an advisory role.

Family-owned Downlite reworks its leadership. Among the key shifts, **Josh Werthaiser** is now CEO after **James Lape** retires from the role; **Marvin Werthaiser** remains as an active Co-owner & COO; **Brian Parnes** becomes CIO & CMO; and **Jyl Davis** becomes VP Marketing & Product Management.

Continued on page 24

Who's News, Cont'd.

Alexandre Henin joins Federation Kids & Family as its new Head Acquisitions.

Spotify secures **Courtney Holt** as VP & Head Spotify Studios/Video. Meanwhile, its Head Video, **Tom Calderone**, exits.

DHX Media's new VP Distribution is **Jerry Diaz**.

LVMH Names **Sylvie Colin** CEO of Kenzo.

Robert Niemann starts a new position as Managing Partner at Sports Advisory Intl. GmbH.

Steve May joins comics and game publisher Space Goat as Director Business Development.

ASIA-G-III Apparel Group and Amlon Capital (**Fred Gehring's** investment fund) partner to form a new joint venture. Gehring will serve as Chairman while **Steve Shen** will serve as CEO.

Julie McKenzie joins Welspun USA as CEO.

Poeticgem's licensing division spins off as Poetic Brands. The new venture is led by **Elliott Matthews** and remains part of parent group PDS Multinational.

Paramount Players hires **Ali Bell** and **Matt Dines** as EVPs, both reporting to President **Brian Robbins**.

Youth research and consulting firm Smarty Pants hires **Haley Kaiser** as its new Insights Whiz.

Southern Hobby Supply welcomes **Trent Harmon** as VP Sales & Marketing.

iProspect appoints **Rohan Philips** as Global Chief Product Officer.

Target taps **Minsok Pak** as its new EVP & Chief Strategy/Innovation Officer.

Thunderbird Entertainment expands its leadership team:

- ▶ **Ivan Fecan** is now Interim CEO. Fecan remains as executive chair of the Thunderbird board and will continue to produce the series "Kim's Convenience."

- ▶ **Jennifer McCarron** is now Co-President & CEO Atomic Cartoons. McCarron also joins the Thunderbird board.

- ▶ **Mark Miller** is also promoted to Co-President. He continues as CEO Great Pacific Media and will maintain his seat on the Thunderbird board.

- ▶ Co-founder **Tim Gamble** is appointed vice chair of the Thunderbird board and will continue to pursue new opportunities for the company, with a focus on IP.

Baltic Linen, the home fashions division of Sobel Westex, hires **Michael Trampas** as its EVP Sales & Marketing.

Bardwil Linens names **Reed Raggio** its new SVP Sales & Merchandising.

Hudson's Bay Co.'s Intl. President, **Don Watros**, departs.

Bob Weinstein and COO **David Glasser** will run Weinstein Co. in the wake of **Harvey Weinstein** being placed on "indefinite leave."

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