

TLL THE LICENSING LETTER

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

46 Properties Make the \$100 Million Entertainment/Character List

A grand total of 46 properties made the \$100 million entertainment/character list for 2016 retail sales, with five new faces joining the pack. All in all, the top properties generated \$43 billion in retail sales of licensed merchandise worldwide. Globally, that marks a \$2 billion increase compared to last year's list.

As is the case every year, the key driving factor behind the growth of properties on the \$100 million list was the presence of a film. Properties featured on the silver screen saw up to double-digit increases in retail sales.

Finding Dory/Nemo is one interesting example—we've combined the two films because the original *Finding Nemo* had a relatively small merchandising program. For the 2016 sequel, Disney pulled out all the stops with a diverse program that included the titular clown fish. Similarly, DreamWorks' *Trolls* was a surprise hit that remained strong in 2017. (According to the company's annual report, "for consumer products, it is the largest merchandising program we have ever done to support a film.")

Other films that remained strong in 2017 from 2016 (but didn't quite earn \$100 million in the U.S./Canada) include Disney's *Moana* and *Beauty and the Beast* as well as Warner Bros.' *Suicide Squad*.

But the fastest-growing properties were actually based on preschool TV series like Peppa Pig (up 250%), Paw Patrol, and PJ Masks. Peppa's growth is extreme—for 2015, TLL estimates that she earned \$55 million in retail sales for the U.S./Canada, despite clearing almost \$1 billion worldwide. Growth for these brands is expected to remain sturdy in 2017; we would not be surprised to record double-digit increases next year.

When we don't count the dramatic growth rates of the newest properties on the list, the next-fastest growth rates actually came from video game brands. While the film component

remains a key ingredient to success, it's not as critical. Transformers toy sales, for example, do well despite poor film reviews. On the other hand, Angry Bird's comeback is largely thanks to the strength of its feature film.

Top-earning Properties

Disney properties dominated the list, taking up the top four slots—Mickey & Friends (flat at -1% growth) led 2016 sales, followed by Star Wars (3%) and Disney Princess (4%). The top three were also the only properties to earn over \$1 billion in sales for the U.S./Canada. Frozen (2%) and Teenage Mutant Ninja Turtles (4%) rounded out the top five, while Hello Kitty—which has been slowly descending the ranks since 2013—dropped to number six with a 6% decline in retail sales.

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TRADEMARKS/BRANDS

Corporate TM/Brands Up 2.7% in 2016; Food/Bev & Tech Lead

Retail sales of corporate trademark/brand-based licensing were up 2.7% worldwide in 2016, according to *The Licensing Letter's Annual Licensing Business Survey*. The U.S./Canada made up almost 80% of retail sales worldwide in 2016, and, in fact, grew at a faster rate than the rest of the world.

The U.S./Canada counted \$28 billion in trademark/brand-based sales, compared to \$7 billion in the rest of the world. The territory was also responsible for an uptick in growth worldwide, with sales growing 2.9% in the U.S./Canada versus 1.9% in the rest of the world. That translates into almost \$800 million in growth for the territory, while sales grew just \$140 million outside the U.S./Canada.

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➡ Licensing Ledger

Toys 'R' Us is "exploring options" for its growing Asian business, including a potential IPO, according to *Bloomberg*. The toy chain's recent bankruptcy only involved its North American businesses; an IPO of the Asian unit would allow TRU's private equity owners to recoup some of their investment by selling shares in a business that's still doing well. TRU and local joint venture partner, the Fung brothers, have been speaking with investment banks to study the feasibility of listing the Asian business. A deal could value the unit at as much as \$2 billion. Euromonitor Intl. estimates that TRU's approximately 130 stores held 20% of 2016's share of sales of dolls, action figures, puzzles, and other products that lack a video-game component in Asia Pacific.

Four months after **Rodale** put itself up for sale, **Hearst** snaps up the publisher. The purchase is expected to be completed in early 2018, involves both Rodale's book group and its larger magazine division, and is worth at under \$225 million, according to the *Wall Street Journal*. Hearst currently runs a small book operation and Rodale recently launched a kid's book imprint this fall; it is unclear how they will interact.

Funko files for an IPO with a raft of blue chip bankers on board to assist with the offering. The Class A shares are traded under the ticker symbol FNKO on the NASDAQ exchange.

Australia's key fashion industries, the designer-focused **Australian Fashion Chamber** and the top body for the clothing, textile, and footwear industries, **Council of Textile & Fashion**, merge. The non-profits will benefit from having established offices in the country's two largest cities and a combined membership that spans the entire Australian fashion and textile industry value chain.

After investing \$500 million in **Snap** in March, **NBCUniversal** is partnering with the social media company on a new digital content studio that will develop IP and franchises for a mobile-first audience.

Canadian studio **Kew Media Group** acquires a stake in London-based **Awesome Media & Entertainment**.

Corus Entertainment's **Nelvana** and **Discovery Communications** form a yet-unnamed venture to produce new content for the kids' market in Canada, Latin America, and around the world. Based in Canada, the venture is dedicated to premium children's content across linear and digital platforms.

Hasbro signs a new five-year exclusive deal for movie and television development with **Paramount**. The development will be done by Hasbro's newly organized Allspark Pictures and Allspark Animation, with Paramount distributing the films and TV series developed. The two companies have previously collaborated on five *Transformers* and two *G.I. Joe* films.

Fox Animation acquires the motion picture rights to **Sanrio's** Mr. Men and Little Miss characters. No director or writer has signed on to the project yet; Shawn Levy (*Night at the Museum* director/producer) will produce through his Fox-based 21 Laps Entertainment.

Disney unveils the cast of its upcoming live-action remake of *The Lion King*, hitting theaters summer 2019. Beyoncé Knowles

and Donald Glover lead the all-star cast as Nala and Simba, respectively. Seth Rogan is Pumba, James Earl Jones is Mufasa, Chiwetel Ejiofor is Scar, and John Oliver is wisecracking Zazu.

Disney held talks with **Fox** to acquire a number of its key assets—including 21st Century Fox Studios, Sky and Star, FX Networks, and National Geographic—*CNBC* reports. Fox would keep its news and sports operations, broadcast network, and TV stations. The deal would help consolidate the Marvel franchise and boost its offerings for Disney's new SVOD project. According to 21st Century Fox's 2016 annual report, the company values its 73% share of **NatGeo** trademarks at approximately \$510 million—pricing the brand at under \$890 million.

Niantic Labs, of Pokémon Go fame, has another big augmented reality game in the words—*Harry Potter: Wizards Unite*. WB Games San Francisco, a division of **Warner Bros.** Interactive Entertainment, is collaborating on the new project. (The game will be published through Portkey Games, a recently launched WB label.)

Target will close 12 full-size underperforming units, located mainly in the South and Midwest. Meanwhile, it's looking at boosting the number of its small format stores, which "do \$500 to \$600 per sq. ft.," according to CEO Brian Cornell who spoke to *WWD*. The number is small compared to others—**Macy's** will shutter about 100 stores this year, Sears Holdings will cut 63 Sears and Kmart units (on top of the 350 store closures it cited earlier in the year), and **JCPenney** will close 140 units.

LEGO's new "Women of NASA" play set is **Amazon's** No. 1 best-selling toy—reaching the stars in just 24 hours following launch.



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THE LICENSING LETTER (ISSN: 8755-6235) is published 12 times a year by Plain Language Media, LLC. The annual subscription price for THE LICENSING LETTER is \$508.95 per year/\$568.95 outside North America. Low-cost site licenses are available for those who wish to distribute this newsletter to their colleagues at the same firm. Please contact our business development department at randy@plainlanguagemedia.com or 201-747-3737 for details.

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46 Properties Make the \$100 Million Entertainment/Character List

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Fourteen properties earned over \$1 billion worldwide, with the list led by Mickey & Friends, Hello Kitty, and Star Wars. While the top 10 remained unchanged from last year, Marvel Avengers jumped one spot up to No. 11. Peppa Pig and Batman joined the exclusive \$1 billion list, bringing Teenage Mutant Ninja Turtles to No. 14.

Only two properties counted over half of all retail sales within the U.S./Canada—Frozen and Teenage Mutant Ninja Turtles. Much of these properties' future growth is expected to derive from outside the territory. Peppa is the least dependent on the territory, with only 16% of 2016 sales hailing from the U.S./Canada—but her share is expected to grow stateside.

The top three properties accounted for over 20% of retail sales on the list, but the most growth came from the properties generating \$300–499 million (adding 3 properties) and \$500–999 million (up by 2 properties) in sales.

In a change from previous years, the number of properties in the \$100–199 million range remained stable—but quite a few graduated from the \$200–299 million range.

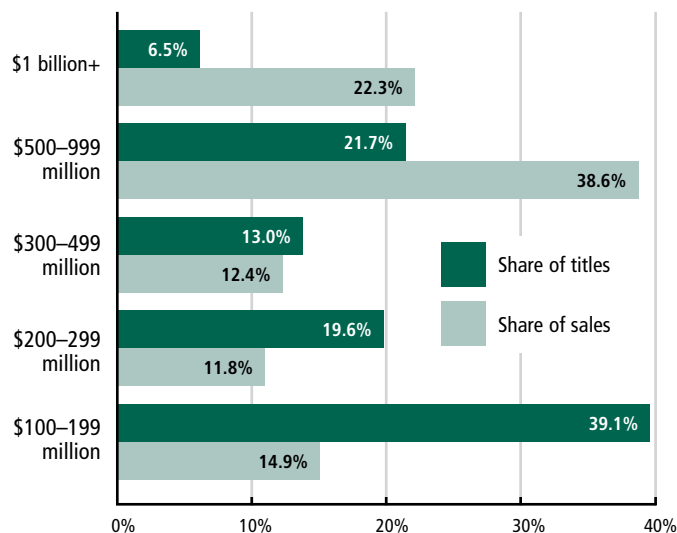
RETAIL SALES OF LICENSED MERCHANDISE BASED ON \$1 BILLION+ ENTERTAINMENT/CHARACTER PROPERTIES, 2016 (Figures in Millions)

RANK, 2016	PROPERTY	LICENSOR	GLOBAL RETAIL SALES, 2016	SHARE FOR U.S. & CANADA, 2016
1	Mickey & Friends	Disney	\$3,983	39.0%
2	Hello Kitty	Sanrio	\$3,418	26.0%
3	Star Wars	Disney	\$3,049	44.8%
4	Winnie the Pooh	Disney	\$2,791	30.1%
5	Disney Princess	Disney	\$2,724	38.6%
6	Frozen	Disney	\$1,598	59.2%
7	Spider-Man	Disney	\$1,551	29.8%
8	Peanuts	DHX Media	\$1,468	31.9%
9	Despicable Me/Minions	Universal	\$1,322	40.5%
10	Angry Birds	Rovio	\$1,277	24.7%
11	Marvel Avengers	Disney	\$1,242	41.6%
12	Peppa Pig	eOne	\$1,189	16.2%
13	Batman	Warner Bros.	\$1,100	48.2%
14	Teenage Mutant Ninja Turtles	Nickelodeon	\$1,093	84.8%

Notes: Figures are for retail sales of all licensed merchandise for calendar years 2015–2016. Does not include content licensing such as DVDs; products created through in-house divisions rather than through licensing agreements with third parties (e.g., toys at Mattel or Hasbro or Pokémon video games from Nintendo); or nonretail products such as touring shows, theme park attractions, cruises, gambling/lotteries, and the like.

SOURCE: THE LICENSING LETTER

SHARE OF TITLES V. SALES FOR \$100 MILLION ENTERTAINMENT/CHARACTER PROPERTIES, U.S. & CANADA, 2016



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

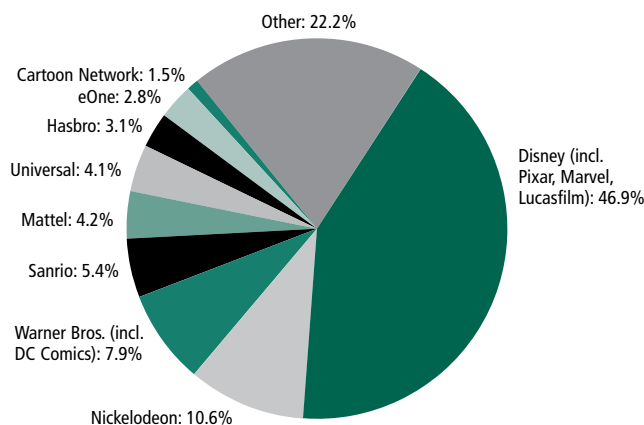
SOURCE: THE LICENSING LETTER

Disney, Nick & Warner Bros. Top Licensors

On the licensor front, Disney's share of retail sales has shrunk to 43.2% after historically taking a full half share of sales on the list. Its share is unsurprising, given that Disney is home to 13 properties on the list (or almost 1/3). Otherwise, the share of retail sales from each of the top five licensors has remained relatively unchanged over the years.

We dropped Rovio off the chart below to make room for up-and-comer eOne, whose two properties generated 2.5% of domestic retail sales on the list.

LICENSOR SHARE OF RETAIL SALES OF LICENSED MERCHANDISE BASED ON \$100 MILLION ENTERTAINMENT/CHARACTER PROPERTIES, U.S./CANADA, 2016



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

SOURCE: THE LICENSING LETTER

Continued on page 4

Pokémon, Minecraft, and Angry Birds Fly High

Video game/interactive/online-based brands took the cake this year, recording the most dramatic rates of growth on the \$100 million list in 2016.

Pokémon was the top trend of summer 2016, thanks to Niantic's AR mobile game. Despite its popularity, however, the property earned just under \$180 million in the U.S./Canada, a 40% increase from 2015. While the property could have sold more, the licensor elected to keep its merchandise licensing program limited during its 20th anniversary celebrations. Overall, the Pokémon Company claims that retail sales reached \$3.3 million worldwide in 2016—the figure includes trading cards, the DS video games, and other sources *TLL* does not count.

As noted above, Angry Birds had a healthy boost in sales thanks to the feature film and a revived licensing program. A sequel is set to bow in 2019. Minecraft also did exceptionally well thanks to licensed toy extensions—the video game is fast-becoming a fixture in classrooms to teach children computer skills.

While they are not on the list, other video game properties that performed well in 2016 include classic properties like Sonic the Hedgehog, Tetris, and Capcom. Franchises like Halo and Call of Duty (which have the largest esports tournaments) continued to perform well—and even indie titles like Five Nights at Freddy's had their time in the spotlight. But that doesn't mean that all video game properties performed well—Skylanders, for example, joins the \$100 million list's biggest losers below. It is not expected to rebound.

The Biggest Losers

On the other end of the spectrum, Disney Cars had the biggest dip in sales at -45%, followed by Monster High (-40%) and Skylanders (-20%).

With a new film in summer 2017, Cars is expected to pick up in retail sales—but based on what we've seen, the property seemed to race through retail with a relatively short sales window.

Girls' properties like Monster High (-40%, despite boasting a film in 2016), Sofia the First (-18%), and Dora & Friends (-11%) continued to lose shelf space. Ben 10 is an interesting story; even as sales declined in the U.S./Canada, they picked up internationally, specifically, in the EMEA territory. A new TV series that began airing this year stateside (Europe saw it in 2016) is expected to pick up sales for 2017.

It should be noted that properties like Dora, Sesame Street, and Garfield saw growth in their overall licensing program in 2016 (for example, in experiential initiatives like live shows and amusement park rides) but nevertheless declined in merchandising.

After just one year on the list, Doctor Who fell off thanks to an apparent collapse in merchandising. With a

new doctor in the house as of this summer, the program is expected to rebound.

Definitions & Methodology

Note that our list doesn't cleanly adhere to *TLL*'s traditional entertainment/character segment—you can't compare the sales on this list to our overall entertainment/character segment, for example. The overall list reflects the top properties in the U.S. and Canada only and excludes top-performing global properties that have U.S. and Canadian retail sales of less than \$1 million.

For this analysis, we have included properties that are based on a recognized character(s) and use the strategies associated with an entertainment/character licensing program, as well as the expected TV shows and films. For example, in our annual business-wide estimates, some properties would be categorized as video games/interactive/online (Minecraft, Pokémon, and Angry Birds), toys (Barbie, My Little Pony), or publishing (Peanuts). In that sense, we've managed to pre-empt some big screen debuts over the years; e.g., Angry Birds (added in 2011, film in 2016) and Minecraft (added in 2013, film in 2019).

The individual property figures are sometimes at variance with publicly reported numbers in company financials or cited by company executives. We look exclusively at consumer products that are licensed to third parties for manufacture and distribution and for which the manufacturer is paying a royalty. Our analysis does not include products created through in-house divisions of the licensor rather than through licensing agreements with third parties, or "core" products made by the licensor (e.g., toys for Hasbro- or Mattel-owned properties).

In addition, the numbers reflect retail sales of traditional licensed products but exclude content licensing and nonretail products such as live touring shows, theme park attractions, lotteries and slot machines, cruises, and similar ventures.

For those properties that are multimedia, the estimates include all merchandise for the franchise (e.g., tied to film, TV shows, etc.). LEGO cross-licensing deals (e.g., LEGO Star Wars, LEGO Batman) are included under the respective partners' properties (e.g., "LEGO Star Wars" under Star Wars). Sub-brands are included along with the master property (e.g., Clone Wars under Star Wars). If individual properties are sometimes licensed as a group (e.g., Batman as part of a multi-property DC Comics), the estimate includes only those products tied to the individual property as specified.

These estimates are developed through a combination of surveys; interviews with licensors, licensees, agents, and retailers; analysis of annual reports, royalty income and data from publicly held companies; store visits; corporate retail sales information; press releases; and news articles. All the licensors that appear on the list were given the opportunity to comment. However, all estimates are by *The Licensing Letter*.

**RETAIL SALES OF LICENSED MERCHANDISE BASED ON \$100 MILLION+ ENTERTAINMENT/CHARACTER PROPERTIES,
U.S./CANADA, 2015–2016 (Figures in Millions)**

RANK, 2016	PROPERTY	LICENSOR	RETAIL SALES, U.S. & CANADA, 2015	RETAIL SALES, U.S. & CANADA, 2016	CHANGE IN RETAIL SALES, U.S. & CANADA, 2015–2016	RETAIL SALES OUTSIDE U.S. & CANADA, 2015	RETAIL SALES OUTSIDE U.S. & CANADA, 2016	CHANGE IN RETAIL SALES, OUTSIDE U.S. & CANADA, 2015–2016	GLOBAL RETAIL SALES, 2015	GLOBAL RETAIL SALES, 2016	CHANGE IN GLOBAL RETAIL SALES, 2015–2016	SHARE FOR U.S. & CANADA, 2016
1	Mickey & Friends	Disney	\$1,571	\$1555	-1%	\$2,428	\$2428	0%	\$3,999	\$3,983	0%	39.0%
2	Star Wars	Disney	\$1,327	\$1367	3%	\$1,515	\$1681	11%	\$2,842	\$3,049	7%	44.8%
3	Disney Princess	Disney	\$1,012	\$1053	4%	\$1,622	\$1671	3%	\$2,635	\$2,724	3%	38.6%
4	Frozen	Disney	\$927	\$945	2%	\$646	\$653	1%	\$1,573	\$1,598	2%	59.2%
5	Teenage Mutant Ninja Turtles	Nickelodeon	\$891	\$927	4%	\$130	\$166	28%	\$1,021	\$1,093	7%	84.8%
6	Hello Kitty	Sanrio	\$945	\$888	-6%	\$2,811	\$2530	-10%	\$3,756	\$3,418	-9%	26.0%
7	Winnie the Pooh	Disney	\$827	\$840	2%	\$1,913	\$1951	2%	\$2,740	\$2,791	2%	30.1%
8	WWE	WWE	\$670	\$672	0%	\$248	\$250	1%	\$918	\$922	0%	72.9%
9	Despicable Me/Minions	Universal	\$514	\$535	4%	\$749	\$787	5%	\$1,264	\$1,322	5%	40.5%
10	Batman	Warner Bros.	\$469	\$530	13%	\$513	\$569	11%	\$982	\$1,100	12%	48.2%
11	Marvel Avengers	Disney	\$424	\$517	22%	\$581	\$726	25%	\$1,004	\$1,242	24%	41.6%
12	Sesame Street	Sesame Workshop	\$513	\$504	-2%	\$279	\$271	-3%	\$792	\$775	-2%	65.1%
13	Peanuts	DHX Media	\$418	\$468	12%	\$908	\$999	10%	\$1,327	\$1,468	11%	31.9%
14	Spider-Man	Disney	\$445	\$463	4%	\$1,067	\$1089	2%	\$1,512	\$1,551	3%	29.8%
15	Paw Patrol	Nickelodeon	First appearance	\$375	N/A	First appearance	\$125	N/A	First appearance	\$500	N/A	75.0%
16	Thomas & Friends	Mattel	\$359	\$366	2%	\$601	\$619	3%	\$960	\$985	3%	37.1%
17	Superman	Warner Bros.	\$320	\$359	12%	\$405	\$454	12%	\$725	\$812	12%	44.2%
18	Minecraft	Mojang/Microsoft	\$263	\$334	27%	\$286	\$366	28%	\$549	\$700	28%	47.8%
19	Angry Birds	Rovio	\$250	\$315	26%	\$815	\$962	18%	\$1,065	\$1,277	20%	24.7%
20	Transformers	Hasbro	\$265	\$273	3%	\$165	\$173	5%	\$430	\$446	4%	61.3%
21	SpongeBob SquarePants	Nickelodeon	\$253	\$268	6%	\$615	\$639	4%	\$867	\$907	5%	29.5%
22	PJ Masks	eOne	First appearance	\$260	N/A	First appearance	\$0	N/A	First appearance	\$260	N/A	100.0%
23	My Little Pony	Hasbro	\$221	\$234	6%	\$211	\$222	5%	\$432	\$456	6%	51.4%
24	Power Rangers	Saban	\$205	\$225	10%	\$125	\$136	9%	\$330	\$361	10%	62.4%
25	Skylanders	Activision Blizzard	\$279	\$223	-20%	\$192	\$169	-12%	\$471	\$392	-17%	56.9%
26	Looney Tunes	Warner Bros.	\$212	\$214	1%	\$427	\$431	1%	\$639	\$645	1%	33.2%
27	Doc McStuffins	Disney	\$199	\$205	3%	\$117	\$120	2%	\$317	\$325	3%	63.1%
28	Barbie	Mattel	\$179	\$202	13%	\$146	\$149	2%	\$324	\$350	8%	57.6%
29	Scooby-Doo	Warner Bros.	\$195	\$197	1%	\$301	\$304	1%	\$496	\$501	1%	39.3%
30	Minnie's Bow-Tique	Disney	\$187	\$193	3%	\$189	\$197	4%	\$377	\$390	4%	49.5%
31	Peppa Pig	eOne	\$55	\$193	250%	\$940	\$996	6%	\$995	\$1,189	19%	16.2%
32	Simpsons	20th Century Fox	\$188	\$192	2%	\$208	\$219	5%	\$396	\$410	4%	46.7%
33	Pokémon	Pokémon Co.	\$127	\$177	40%	\$204	\$276	35%	\$331	\$453	37%	39.1%
34	Dora & Friends	Nickelodeon	\$188	\$167	-11%	\$594	\$546	-8%	\$782	\$714	-9%	23.5%
35	Finding Dory/Nemo	Disney	First appearance	\$150	N/A	First appearance	\$180	N/A	First appearance	\$330	N/A	45.5%
36	Trolls	Universal	First appearance	\$140	N/A	First appearance	\$155	N/A	First appearance	\$295	N/A	47.5%
37	Betty Boop	King Features	\$141	\$125	-11%	\$406	\$381	-6%	\$546	\$507	-7%	24.7%
38	Disney Cars	Disney	\$252	\$139	-45%	\$692	\$450	-35%	\$944	\$588	-38%	23.6%
39	Sofia the First	Disney	\$165	\$135	-18%	\$75	\$60	-20%	\$240	\$195	-19%	69.4%
40	Star Trek	CBS	\$125	\$132	5%	\$24	\$28	15%	\$149	\$159	7%	82.5%
41	Mickey Mouse Clubhouse	Disney	\$131	\$131	0%	\$131	\$133	1%	\$263	\$264	0%	49.8%
42	Ben 10	Cartoon Network	\$156	\$128	-18%	\$414	\$476	15%	\$569	\$603	6%	21.2%
43	Adventure Time	Cartoon Network	\$117	\$119	2%	\$41	\$43	5%	\$158	\$162	3%	73.5%
44	Monster High	Mattel	\$192	\$115	-40%	\$71	\$43	-40%	\$263	\$158	-40%	72.9%
45	Shopkins	Moose Toys	\$103	\$110	7%	\$161	\$169	5%	\$264	\$279	6%	39.5%
46	Garfield	Paws Inc.	\$108	\$107	-1%	\$328	\$331	1%	\$436	\$438	1%	24.4%
	TOTAL		\$16,388	\$17,769	8%	\$24,294	\$25,323	4%	\$40,682	\$43,088	6%	41.2%

Note: Numbers include only products for preschoolers (e.g., older-skewing products for My Little Pony are not included). Includes only licensed and not in-house-produced merchandise (e.g., merchandise sourced by a Disney division for theme parks or Disney-owned stores is not included; toys tied to Hasbro-owned My Little Pony or Mattel-owned Thomas are not included). Includes DVDs, apps, and other digital content, if not in-house-produced.

SOURCE: THE LICENSING LETTER

Corporate TM/Brands Up 2.7% in 2016; Food/Bev & Tech Lead

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Over the three years spanning 2013 to 2016, retail sales of trademarks/brand-licensed goods grew 8.1%, compared to a 0.5% decline internationally. Globally, sales grew 6.2% in that period.

Retail Sales by Sector

In the U.S./Canada, we additionally break out sales by subcategory. The best performing subcategories with the greatest amount of retail sales in 2016 were food/beverage (33.4% of total trademark/brand sales), consumer electronics (14.1%), and apparel (9.4%).

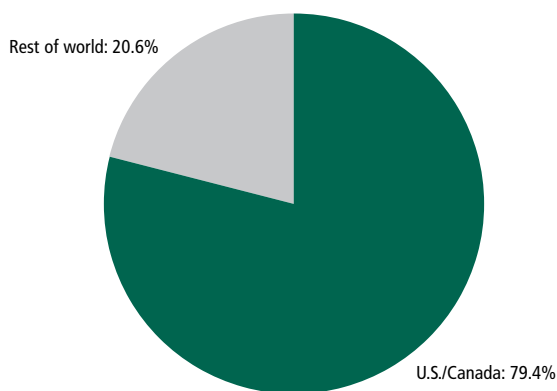
The fastest-growing subcategories, on the other hand, were food/beverages (up 4.3% in 2016); hardware, appliance, and tools (4.0%); and electronics/technology (4.0%). The last two categories grew largely as a function of companies expanding into closely related products and taking their manufacturing out-of-house. Since 2013, however, every subcategory within trademarks/brands has been growing at a steady clip. Virtually no subcategory saw declines.

Royalties Steady

The average royalty for licensing based on trademarks/brands tend to run a percentage point or two lower than the industry-wide average—in 2016, the figure remained steady at 7.7%, compared to an 8.7% overall average. In part, this is because agreements are usually built on longer-term relationships than, for example, entertainment-based licenses.

The range of royalties stretches to the extreme low end (2%), with competition among brands an added factor in keeping rates in this sector below the average. Royalties are often largely dependent on the retail tier for which the licensing program is directed.

RETAIL SALES OF LICENSED MERCHANDISE, BASED ON TRADEMARKS/BRAND PROPERTIES, WORLDWIDE, 2016



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

RETAIL SALES OF LICENSED MERCHANDISE, BASED ON TRADEMARKS/BRAND PROPERTIES, WORLDWIDE, 2013–2016 (Figures in Millions)

TERRITORY	RETAIL SALES, 2016	RETAIL SALES, 2015	CHANGE, 2015–2016	CHANGE, 2013-2016	MARKET SHARE, 2016
U.S./Canada	\$28,443	\$27,645	2.9%	8.1%	79.4%
Rest of World	\$7,401	\$7,263	1.9%	-0.5%	20.6%
Total	\$35,844	\$34,908	2.7%	6.2%	100.0%

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

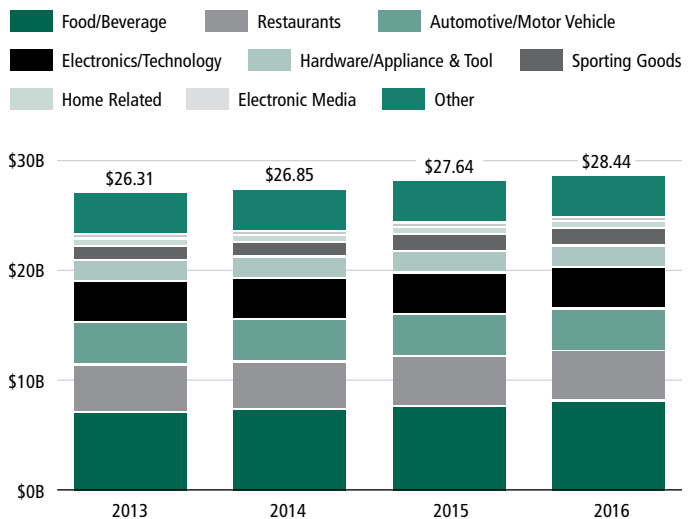
For example, in mass retail channels, royalties are generally two points or so below those headed for specialty channels, since the margin requirements of mass merchandisers limits the amount of royalty that can be absorbed into the retail price.

Retail Sales by Product Category

Licensed food/beverage goods lead in retail sales, occupying 33.7% of all sales in the corporate trademarks/brands category. The lion's share of licensed goods is a function of food/beverage and restaurant brands branching into licensed extensions, but there is also some activity from other property types.

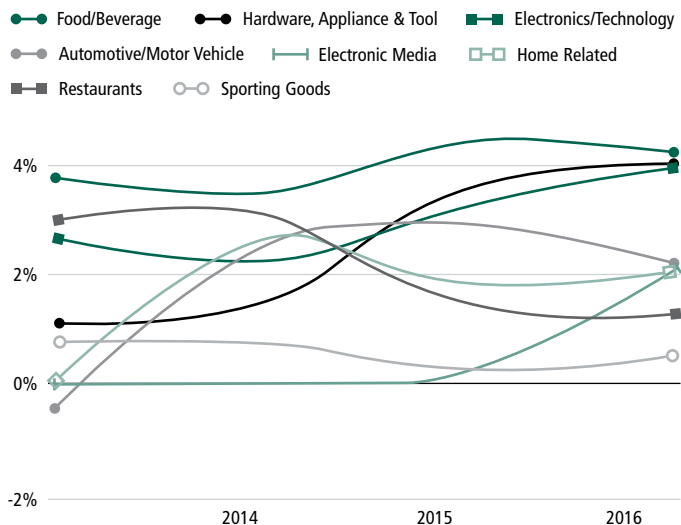
The product category is followed by consumer electronics (14.1%; mostly from electronics/technology brands), apparel (9.4%), and accessories (6.7%). The last two product categories see activity from every subcategory under trademarks/brands.

RETAIL SALES OF LICENSED MERCHANDISE, BASED ON TRADEMARK/BRAND PROPERTIES, U.S. & CANADA, 2013–2016



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

GROWTH IN RETAIL SALES OF LICENSED MERCHANDISE, BASED ON TRADEMARK/BRAND PROPERTIES, BY SECTOR, U.S./CANADA, 2013–2016



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

The top five categories with the largest growth in retail sales over the last five years are food/beverages (33.7%), consumer electronics (28.7%), apparel (23.5%), hardware and paint (22.3%), and sporting goods (17.7%). Video games/software and stationery/paper saw the biggest declines from 2011 to 2016.

Note that you can download every chart in this story online at www.thelicensingletter.com.

RETAIL SALES OF LICENSED TRADEMARK/BRAND MERCHANDISE, BY PRODUCT CATEGORY (Figures in Millions)

PRODUCT CATEGORY	RETAIL SALES, 2016	RETAIL SALES, 2015	CHANGE, 2015–2016	SHARE, 2016
Accessories	\$1,905	\$1,871	1.8%	6.7%
Apparel	\$2,667	\$2,569	3.8%	9.4%
Consumer Electronics	\$4,002	\$3,874	3.3%	14.1%
Domestics	\$76	\$75	1.4%	0.3%
Food/Beverages	\$9,598	\$9,158	4.8%	33.7%
Footwear	\$1,686	\$1,671	0.9%	5.9%
Furniture/Home Furnishings	\$870	\$859	1.3%	3.1%
Gifts/Novelties	\$275	\$299	-8.1%	1.0%
HBA	\$981	\$986	-0.5%	3.4%
Housewares	\$509	\$507	0.4%	1.8%
Infant Products	\$221	\$219	0.7%	0.8%
Publishing	\$865	\$840	3.0%	3.0%
Sporting Goods	\$1,200	\$1,164	3.1%	4.2%
Stationery/Paper	\$86	\$90	-4.8%	0.3%
Toys/Games	\$561	\$551	1.9%	2.0%
Video Games/Software	\$412	\$422	-2.4%	1.4%
Other	\$2,532	\$2,490	1.7%	8.9%
<i>Hardware and Paint</i>	\$171	\$165	3.8%	0.6%
<i>Gardening</i>	\$115	\$112	3.1%	0.4%
<i>Pet Products</i>	\$215	\$209	2.8%	0.8%
<i>Automotive Accessories</i>	\$377	\$366	3.1%	1.3%
<i>Boats and Vehicles</i>	\$496	\$494	0.5%	1.7%
<i>Other</i>	\$1,157	\$1,144	1.1%	4.1%
Total	\$28,445	\$27,645	2.9%	100.0%

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

Representative Corporate Trademark/brand Properties

The range of corporate brands with licensing programs is enormous. We break out some of the larger sub-groups, including automotive/vehicle, food/beverage, restaurants, sporting goods, hardware/appliance/tool, home-related, electronics/technology, and electronic media. Retail brands, diet/health brands, luggage brands, and additional brand-based properties are aggregated under "Other." Large as this sector is, much licensing in this area is "invisible" and difficult to estimate.

Automotive/Vehicle: BMW, Cadillac, Caterpillar, Chevrolet, Chrysler, Corvette, Dodge, Ferrari, Ford Motor, Harley-Davidson, Hummer, Jaguar, Jeep, John Deere, Kawasaki, Mack Truck, Mercedes Benz, Mustang, Porsche, Winnebago.

Food/Beverage: Arm & Hammer, Betty Crocker, Blue Diamond, Budweiser, Campbell's, Cheerios, Chiquita, Coca-Cola, Coors, Corona, Del Monte, Dr Pepper/Snapple, Godiva, Green Giant, Hershey, Jack Daniel's, Jim Beam, Kahlua, Keurig, M&Ms, Miller, Mountain Dew, Nathan's, Nestle, Oreo, Pepsi-Cola, Pillsbury, Reese's, Special K, Sunkist, Sun-Maid, Welch's.

Restaurants: Baja Fresh, Baskin-Robbins, Boston Market, Burger King, California Pizza Kitchen, P.F. Chang's, Cinnabon, Dunkin Donuts, Fazoli's, Jamba Juice, La Tasca, McDonald's, Red Robin, Starbucks, Subway, Taco Bell, TGI Friday's, White Castle.

Sporting goods: Body Glove, Browning, Coleman, Dunlop, Everlast, Polaris, Rawlings, RealTree, Remington, Smith & Wesson, Spalding, Wilson, Winchester, Under Armour.

Hardware/Appliance/Tools: Black & Decker, Craftsman, DeWalt, Honeywell, Maytag, Snap-On, Stanley, Sunbeam, Westinghouse, Whirlpool.

Home-related: Croscill, Farberware, Fiesta, Mikasa, Mr. Clean, Pfaltzgraff, Rubbermaid, Waverly, Woolite.

Electronics/Technology: AT&T, Apple, Emerson, GE, IBM, Phillips, Polaroid, RCA, Timex, Verizon, Westinghouse, Xerox.

Electronic media: Animal Planet, Discovery Channel, ESPN, HGTV, Food Network.

Other: American Kennel Club, American Tourister, Armor All, Dr. Scholl's, Eveready, Jenny Craig, Linens 'n Things, Samsonite, Scotts MiracleGro, Sharper Image, Toys 'R' Us, Weight Watchers.

Licensing News

Properties Available Or Recently Assigned, U.S.

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Canticos	Preschool brand brings some of the most beloved Spanish-language nursery rhymes to life through bilingual books, interactive apps, and sing-along videos.	All	Pam Kaufman, Nickelodeon & Viacom Consumer Products (NVCP)
Dickey's Barbecue Pit	Largest barbecue restaurant chain in the U.S. for over 75 yrs. with nearly 600 locations in 44 states.	All	Bill McClinton, Global Icons
Front Porch Pickins	Lifestyle brand evolved from vintage market roots specializing in farmhouse, industrial, and vintage design.	All	Amy Pagels, ALP Consulting Inc.

Licenses Recently Granted, U.S.

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Coco	BoxLunch	Fashion tops, t-shirts	Disney Consumer Products
	Córdoba Music Group	Guitars	
	Jaya Apparel Group	Apparel	
	Patina Vie	Ceramic ware, glassware	
	USAOPOLY	Board games	
French Bull	Ergobaby	Baby carriers	French Bull
Harry Potter	Williams-Sonoma	Kitchenware	Warner Bros. Consumer Products
Jeep	Tervis	Drinkware	Fiat Chrysler Automobiles (FCA)
JoJo Siwa	CozyPhones/Halo Acoustic Wear	Headphones	Nickelodeon & Viacom Consumer Products (NVCP)
Justice League	Sunstaches/H2W	Novelty sunglasses	Warner Bros. Consumer Products
Kaws x Peanuts	UNIQLO	Apparel, plush	Peanuts Worldwide div. DHX Media
LaurDIY	C.R. Gibson	Back-to-school products, stationery	Brand Liaison (The)
	Cousin Corp. of America	Hair accessories, jewelry kits	
	Plaid Enterprises	Craft supplies	
	RoseArt at Mattel	Calendars, craft kits, desk accessories, plush	
Loving Vincent	Bespoke Technologies	Print-on-demand products, print-on-demand t-shirts	Moxie & Co.
	Pixels.com div Fine Art America	Print-on-demand products	
Madballs	ThinkU	Mobile game apps	American Greetings Entertainment
Magic: The Gathering	WizKids div. National Entertainment Collectibles Association (NECA)	Board games, mini figures	Wizards of the Coast
MLB Players Association	Teamwork Athletic Apparel	Apparel	MLB Players Association
Mountain Dew	Matix Clothing Co.	Apparel	Joester Loria Group (JLG)
Muhammad Ali	Bombas	Socks	Authentic Brands Group (ABG)
Outlander	AbbyShot Clothiers*	Accessories, bags, handbags, wallets	Knockout Licensing – A CopCorp Partnership
	Cryptozoic Entertainment*	Digital collectibles, tabletop games, trading card accessories, trading cards, vinyl figures	
	Ecell Global Ltd.	Mobile phone cases, tablet cases	
	Heaven and Earth Designs	Cross-stitch kits	
	Insight Editions	Candles, greeting cards, journals, postcards, posters, stationery	
Paw Patrol	CozyPhones/Halo Acoustic Wear	Headphones	Nickelodeon & Viacom Consumer Products (NVCP)
Popeye	Jerry Leigh Apparel*	Apparel	King Features Syndicate
Shimmer & Shine	CozyPhones/Halo Acoustic Wear	Headphones	Nickelodeon & Viacom Consumer Products (NVCP)
Stranger Things	BoxLunch	Accessories, apparel	Netflix
	Hasbro	Board games	
Super Geek Heroes	Signature Gifts	Books	Edutainment Licensing
Tapatio Hot Sauce x StarKist Tuna	StarKist (div. Dongwon Group)	Co-branded packaged food	Brand Central
Teenage Mutant Ninja Turtles	CozyPhones/Halo Acoustic Wear	Headphones	Nickelodeon & Viacom Consumer Products (NVCP)
Tulipop	Hot Topic/BoxLunch/Her Universe	Accessories, apparel, gifts & collectibles	Sage Licensing Group
	Jay Franco & Sons	Bedding	Playlife Co.
	Loungefly	Accessories	Sage Licensing Group
	Mad Dog Concepts	Socks	Playlife Co.
	Mighty Fine	Apparel	Sage Licensing Group
	Pyramid America	Stationery	Playlife Co.
	Toynami	Collectibles, plush	Sage Licensing Group

*Extension or renewal.

Continued on page 9

Licensing News *Continued from page 8*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Van Gogh Museum	Ata-Boy	Buttons, key chains, magnets, patches, pins, stickers	Moxie & Co.
	Christopher Radko/Rauch Industries	Christmas ornaments (glass)	
	DEMDACO	Scarves, wraps	
	Erwin Pearl	Accessories, jewelry	
	Gallery Drinkware	Drinkware (glass), water bottles	
	Quarto Publishing Group USA	Books	
	Rosanna Inc	Christmas ornaments, giftware	
	September Publishing	Books	
	Socksmith Design	Socks	
Walking Dead (The)	Lot18	Wine	AMC Networks
WWE	Komar Sleepwear	Sleepwear (children's)	World Wrestling Entertainment (WWE)
Zak Storm	Bandai America	Master toy	Zag America

International Properties Available or Recently Assigned

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Angelo Rules	Animated series about a boy and his best friends as they create strategies to out-think and defeat their adversaries.	All (Germany)	Astrid Markl, g.l.a.m. GmbH & Co. KG
Beyblade Burst	Anime stars Valt Aoi and his classmates as they fight their way through tournaments trying to win the title of "World's #1 Blader."	All (U.K.)	Charlie Donaldson, Rocket Licensing
Cecile Hubene	International artist celebrates life, memories and dreams through vivid scenes and dramatic colors.	All (Worldwide)	Danny Simon, Licensing Group (The)
Chupa Chups	Spanish lollipop and confectionery brand sold in over 150 countries around the world.	All (excluding food & beverage) (Germany)	Kristin Ehring, g.l.a.m. GmbH & Co. KG
Club América	One of Mexico's leading soccer clubs; competes in Liga MX, the top professional league in the country.	All (North America)	Alex Altamirano, One Entertainment
Cool School	Children's Youtube channel mixed animation and live action, generating billions of views.	All (Worldwide)	Danny Simon, Licensing Group (The)
Epic Rights	Brands include Madonna, KISS, AC/DC, John Lennon, David Bowie, and art photography Rock Paper Photo.	All (Japan)	Kunihiko Tsuji, PAN Inc.
Feisty Pets	Plush toy from William Mark Corp. that go from cute to feisty with just a squeeze.	All (Worldwide)	Elan Freedman, Surge Licensing
Jim Killen	Internationally recognized wildlife and sporting dog artist with a loyal following.	Gifts, home decor & bedding, kitchen & bath textiles, melamine, puzzles, stationery (Worldwide)	Marty Segelbaum, MHS Licensing + Consulting
Jungle Book (The, series)	DQ Entertainment's animated series enters its third season on Discovery Kids TV.	All (North America)	Danny Simon, Licensing Group (The)
King Features	Unit of Hearst represents Popeye, Betty Boop, Flash Gordon, The Phantom, Hagar the Horrible, Prince Valiant, and more.	All (Russia)	Friderico Gatti, Megalicense
Kung Fu Pork Choppers (GG Bond)	Action series about five young superhero pigs with super-powered pets that transform into mega-sized fighting machines with ultra-animal attributes.	All (Worldwide (excluding Asia))	Alfred Kahn, CraneKahn
Louise Carey	Pop-inspired artist whose work resonates with and appeals to today's young audience of tweens to twenty-somethings.	Apparel & accessories, bath textiles, gifts & gift packaging, greeting cards, home decor & bedding, melamine, stationery (Worldwide)	Marty Segelbaum, MHS Licensing + Consulting
Narcos	Netflix series depicts the blurred lines of good and bad during the cocaine-fueled drug wars of late '80s.	All (U.K., Eire)	Francesca Lisle, Lisle Intl. Licensing
*NSync	Nineties boy band celebrates its 20th anniversary of 1998 debut album next year.	Accessories, apparel, gifts & collectibles (Worldwide)	Lisa Streff, Epic Rights
P. King Duckling	Chinese/American series features P. King and his best friends as they transform everyday activities into crazy fun adventures.	All (Worldwide)	Sharon Eisen, UYoung Entertainment Intl.
Peanuts	Classic American comic strip written and illustrated by Charles M. Schulz.	All (U.K., France, Middle East)	Peter Byrne, CPLG U.K. (Copyright Promotions Licensing Group)
Peppa Pig	Preschool animated series follows the adventures and everyday family life of an anthropomorphic female pig, her family, and friends.	All (Germany, Austria, Switzerland)	Claude Schmit, Super RTL
PUR	Thirty year-old water filtration brand known for quality, certified products that reduce at-home water contaminants.	All (North America)	Jay Asher, Brandgenuity
School of Roars	Animated comedy series helps children prepare for school life by experiencing preschool through the eyes of five young monsters.	All (U.K., Eire)	Francesca Lisle, Lisle Intl. Licensing
Scream Street	A school boy (werewolf) is discovered by a government agency (G.H.O.U.L.) and transferred to Scream Street, where monsters freely roam.	All (Italy, Italian speaking territories)	Marco Piccinini, Atlantya Entertainment S.p.A.
Stephanie Ryan	Watercolor artist combines florals, patterns, and empowering sentiment. Products range from cards to fabric.	Accessories, gift packaging, home decor, kitchen accessories, stationery products, textiles (Worldwide)	Marty Segelbaum, MHS Licensing + Consulting

*Extension or renewal.

Continued on page 10

International Licenses Recently Granted

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Abraham Hunter	Amia Studios	Suncatchers (glass) (U.S., Canada)	MHS Licensing + Consulting
	Artecy Cross Stitch/Pixelhobby	Cross-stitch kits, pixelhobby kits (Worldwide)	
	Cobble Hill Puzzle Co. div Outset Media	Jigsaw puzzles (Worldwide)	
	Design Works Crafts	Craft kits, sequined calendar craft kits (Worldwide)	
Al Agnew	American Sportsman Sign	Wooden signs (North America)	
	Charting Creations	Cross-stitch charts & kits (Worldwide)	
	Cobble Hill Puzzle Co. div Outset Media	Jigsaw puzzles (Worldwide)	
Amylee Weeks	DesignScapes	List pads, note cards, note pads (U.S., Canada)	
Angelo Rules	Blue Ocean Entertainment AG	Magazines, stickers, trading cards (Germany)	g.l.a.m. GmbH & Co. KG
Archie Comics	Zynga	Virtual slot machines (Worldwide)	King Features Syndicate
Audrey Jeanne Roberts	Allure Home Creations	Bath ensembles (U.S., Canada)	MHS Licensing + Consulting
	Crown Point Graphics	Bookmarks, cards, list pads, sticky notes (U.S., Canada)	
	Custom Decor	Word art (North America)	
Baby Boop	Swyft Media div. Monotype Imaging Holdings	Mobile apps (Worldwide)	King Features Syndicate
	American Classics*	Onesies, t-shirts (U.S., Canada)	
	Branch Out Co., Ltd.*	Accessories, apparel (Japan, China, Taiwan)	
	GBG Socks dba Planet Sox: Global Brands Group*	Flip flops, slippers, socks (U.S., Canada)	
	Howard Keys*	Key chains, keys, lanyards, novelty dog tags (U.S., Canada)	
	MBI/Danbury Mint U.K.	Accessories, apparel, Christmas ornaments, figurines, flags (U.S., U.K., Ireland)	
	Zels Co.	Apparel (Japan)	
Bing	Bright Blue Foods Ltd. (BBF)	Celebration cakes (U.K.)	Acamar Films
	Dreamtex Ltd.*	Cushions, home textiles, wallpaper (U.K.)	
	Egmont (U.K.)*	Activity sheets, stickers (U.K.)	
Black & Decker	Wagz, Inc.	Mobile apps, smart dog collars, smart dog doors, smart feeder (U.S., Canada)	Beanstalk
Brandalised	Groovy U.K.	Accessories, giftware (U.K., Europe)	Art Ask Agency
Brenda Polreis	Carson Home Accents/Carson Industries	Garden flags (U.S., Canada)	MHS Licensing + Consulting
Britannica 10-Minute Guide: Bible	Publications International Ltd. (PIL)	Books (Worldwide)	JRL Group
Britannica 10-Minute Guide: Space			
Britannica 10-Minute Guide: U.S. History			
Captain America	Zuru	Fidget cubes (Worldwide)	Disney Consumer Products
Christine Adolph	Carson Home Accents/Carson Industries	Garden flags (U.S., Canada)	MHS Licensing + Consulting
Coco	Funko	Vinyl figures (Worldwide)	Disney Consumer Products
	Hybrid Promotions dba Hybrid Apparel	T-shirts (U.S., Canada)	
	Jay Franco & Sons	Bedding, pillows (Worldwide)	
	Mattel	Action figures, plush (Worldwide)	
	Torrid	Apparel (Worldwide)	
Collin Bogle	Charting Creations	Cross-stitch charts & kits (Worldwide)	MHS Licensing + Consulting
Corbert Gauthier			
Cranston Collection	Custom Decor	Word art (North America)	
Crayola	Feizy	Bath mats, rugs, throws (U.S., Brazil)	Crayola
	Siscovers	Bedding, curtains, pillows, shower curtains (U.S., LATAM)	
Cuphead	Accutime Watch	Watches (U.S., Canada)	King Features Syndicate
	Bottleneck Gallery	Limited edition art prints, pins (U.S., Canada)	
	Fifth Sun Apparel	Apparel (Worldwide)	
	Funko	Accessories, apparel, housewares, plush, vinyl figures (Worldwide)	
Darrell Bush	American Sportsman Sign	Wood signs (North America)	MHS Licensing + Consulting
	Charting Creations	Cross-stitch charts & kits (Worldwide)	
DC Comics	Zuru	Fidget cubes (Worldwide)	Warner Bros. Consumer Products
Dennis the Menace	American Classics	Onesies, t-shirts (U.S., Canada)	King Features Syndicate
Descendants	Egmont (U.K.)	Magazines (U.K.)	Disney Consumer Products

*Extension or renewal.

Continued on page 11

Licensing News *Continued from page 10*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
emoji	Grandi Salumifici Italiani S.p.A.	Iron-on patches, packaging (Italy)	Maurizio Distefano Licensing (MD Licensing)
England Rugby	OPRO*	Mouthguards (U.K.)	CPLG U.K. (Copyright Promotions Licensing Group)
Feisty Pets	Rubie's Costume	Costumes (Worldwide)	Surge Licensing
Flash Gordon	Zels Co.	Apparel (Japan)	King Features Syndicate
Flash Gordon (1980)	Zels Co.	Hooded sweatshirts, sweatshirts, t-shirts, tote bags (Japan)	
Flossy and Jim	Caseable	Device cases (U.S., Europe)	Edutainment Licensing
Frida Kahlo	Groovy U.K.	Accessories, giftware (U.K., Europe)	Art Ask Agency
Gina Linn	Carson Home Accents/Carson Industries	Garden flags (U.S., Canada)	MHS Licensing + Consulting
	Custom Decor	Word art (North America)	
	Legacy Publishing	Greeting cards (Worldwide)	
H. Hargrove	Signature Brands	Tins (U.S., Canada)	
Hagar the Horrible	Blueprint Gaming Ltd.	Mobile game apps, social casino games (U.K., Ireland, Europe)	King Features Syndicate
Hautman Brothers	American Sportsman Sign	Wood signs (North America)	MHS Licensing + Consulting
	Charting Creations	Cross-stitch charts & kits (Worldwide)	
Hello Kitty	ASOS Plc	Apparel (U.S., U.K., Europe)	Sanrio
	ASOS Plc	Accessories, apparel (U.K.)	Sanrio GmbH
	Cris Conf S.p.A./Pinko	Apparel (Europe)	
Hulk (The)	Zuru	Fidget cubes (Worldwide)	Disney Consumer Products
I'm a Celebrity...Get Me Out of Here	Hawkin's Bazaar	Novelty snacks (U.K.)	ITV Studios Global Entertainment - Kids Division
Iron Man	Zuru	Fidget cubes (Worldwide)	Disney Consumer Products
James Meger	Charting Creations	Cross-stitch charts & kits (Worldwide)	MHS Licensing + Consulting
Jimmy the Bull	Groovy U.K.	Accessories, giftware (U.K., Europe)	Art Ask Agency
Judy Buswell	Charting Creations	Cross-stitch charts & kits (Worldwide)	MHS Licensing + Consulting
Justice League	Concept One Accessories	Accessories, bags, cold weather accessories, headwear, small leather goods (U.S., Mexico)	Warner Bros. Consumer Products
Kathy Hatch	Charting Creations	Cross-stitch charts & kits (Worldwide)	MHS Licensing + Consulting
KISS	Sproing Publishing	Mobile game apps (Worldwide)	Epic Rights
Laundry by Design	NMNY Group LLC	Dresses, social occasion dresses (U.S., Canada)	Perry Ellis Intl./PEI Licensing
Laundry by Shelli Segal	NMNY Group LLC	Dresses, social occasion dresses (U.S., Canada)	
Lisa Jane Smith	HouseWares Intl.	Ceramic mugs (U.S., Canada)	MHS Licensing + Consulting
Miffy	Paul Dennicci Ltd.	Apparel (infants') (U.K.)	DRI Licensing Ltd.
	Tobias & the Bear	Apparel (infants') (U.K.)	
Moomins (The)	Aurora World U.K.	Plush (U.K.)	Caroline Mickler
	Puffin Books div. Penguin Random House	Books (U.K.)	
	Roy Lowe & Sons Ltd.	Socks (girls', women's) (U.K.)	
	Smith & Brooks Ltd.	Apparel (children's, infants', toddlers', girls) (U.K.)	
Mossy Oak	Starcraft RV/Jayco Inc.	RV products (North America)	Haas Outdoors dba Mossy Oak
Mr. Men & Little Miss	Keds div. Wolverine Worldwide	Sneakers (Worldwide)	Sanrio
Mysticons	Playmates Toys	Toys (U.S., Canada)	Corus Entertainment/Nelvana Enterprises
	Topps	Trading cards (U.S., Canada)	
NBA	'47 Brand	Apparel, headwear (U.S., Canada, Mexico, Australia, Japan)	NBA Entertainment (National Basketball Association)
Nitro Circus	Walmart	Bicycles (Worldwide)	Nitro Circus
Pat Pauley	American Sportsman Sign	Wood signs (North America)	MHS Licensing + Consulting
Paw Patrol	Haus of JR	Apparel (children's) (Worldwide)	Nickelodeon & Viacom Consumer Products (NVCP)
Peppa Pig	Merlin Entertainments Group plc	Theme park attractions (Worldwide (excluding U.K.))	Entertainment One (eOne) U.K.
Pepsi	DVB Brands	Footwear (India)	PepsiCo
Phantom (The)	Mallon Publishing Pty Ltd.*	Desk calendars, wall calendars (ANZ)	King Features Syndicate
Popeye	Branch Out Co., Ltd.*	Accessories, apparel (Japan, China, Hong Kong, Taiwan)	
	Crown Creative Co. Ltd.*	Accessories (women's), apparel (women's), nightwear (women's) (Japan)	
	Swyft Media div. Monotype Imaging Holdings	Mobile apps (Worldwide)	
	Topisatex*	Boxers (men's, juniors'), pajamas, t-shirts (Spain, Portugal)	
	Zels Co.	Hooded sweatshirts, sweatshirts, t-shirts, tote bags (Japan)	

*Extension or renewal.

Continued on page 12

Licensing News *Continued from page 11*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Pusheen the Cat	Character World/TDS Enterprises	Bedroom textiles (U.K.)	Fluid World Ltd.
PyeongChang 2018 Olympic Games	Ubisoft	Video games (Worldwide)	PyeongChang Organizing Committee for the Olympic Games
Rebecca Minkoff	Safilo S.p.A.	Eyewear, sunglasses (Worldwide through 2024)	Rebecca Minkoff
Rebecca Stoner	Legacy Publishing	Greeting cards (Worldwide)	MHS Licensing + Consulting
Robin Roderick	HouseWares Intl.	Ceramic mugs (U.S., Canada)	
Rubik's	Formia	Travel amenity kits (children's) (Worldwide)	Smiley Company (The)/SmileyWorld
	Gibsons/HP Gibson & Sons Ltd.	Puzzles (U.K.)	
	JCorp	Accessories, apparel (U.S., Canada)	
	Place des Editeurs SAS	Publishing (France)	
Sesame Street	Mattel	Master toy (LATAM)	Sesame Workshop
	Mattel	Construction block sets, construction blocks (North America, LATAM)	
Shania Twain	Supersolid	Mobile games (Worldwide)	Universal Music Group Nashville
Shaun the Sheep	Sinco Toys Ltd.	Master toy (U.K., Eire)	Start Licensing
Slush Puppie	151 Products Ltd.	Air fresheners (U.K.)	Pink Key Consulting
	Manchester Drinks Co. Ltd.	Pre-mixed cocktails (U.K.)	
Smiley World	Formia	Travel amenity kits (children's) (Worldwide)	Smiley Company (The)/SmileyWorld
Spider-Man	Zuru	Fidget cubes (Worldwide)	Disney Consumer Products
Stacey Yacula	StyleCraft Home Collection	Framed prints (U.S., Canada)	MHS Licensing + Consulting
Star Wars	Rag & Bone	Accessories, apparel (Worldwide)	Disney Consumer Products
Stephanie Ryan	Enchante Accessories	Boxes, ceramic kitchen accessories, dinnerware, greeting cards, napkins, stationery & bags (Worldwide)	MHS Licensing + Consulting
	Trends International	Calendars, planners (U.S., Canada)	
	York Wallcoverings & RoomMates	Wallpaper borders (Worldwide)	
Stranger Things	Topshop/Top Man div. Arcadia Group Ltd.	Apparel (U.K.)	Netflix
Timmy Time	Sinco Toys Ltd.	Master toy (U.K., Eire)	Start Licensing
Tina Higgins	Custom Decor	Word art (North America)	MHS Licensing + Consulting
UFC	OPRO	Mouthguards (Worldwide)	Endeavor (form. WME/IMG Worldwide Licensing)
Val Warner	Plaid Enterprises	Paint-by-number kits (Worldwide)	MHS Licensing + Consulting
Victoria Schultz	American Sportsman Sign	Wood signs (North America)	
	Custom Decor	Garden flags, magnets, mailbox covers, mats, signs (North America)	
Warhammer 40,000	WizKids div. National Entertainment Collectibles Association (NECA)	Board games, dice games (Worldwide)	Games Workshop Group Plc
WWE	Loyal Subjects (The)	Vinyl figures (U.S., Canada)	World Wrestling Entertainment (WWE)
	Pangea Brands	Plush figures (U.S, Canada)	
	PTX Performance Products U.S.A.	Inflatable chairs, pool toys, slip n' slides, snow sleds, swim gear (U.S, Canada)	

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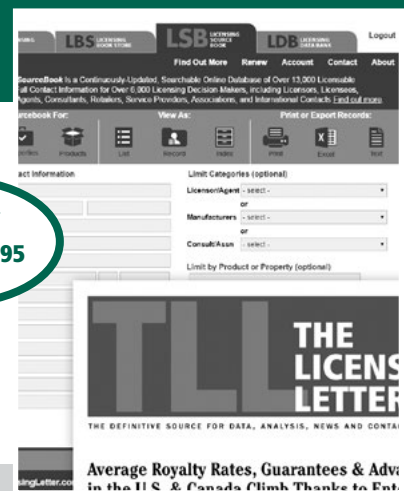
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Supersolid, Ed Chin, CEO, info@supersolid.com, P. 12.

Tobias & the Bear, Leanne McKeever, Co-founder, hello@tobiasandthebear.com, P. 11.

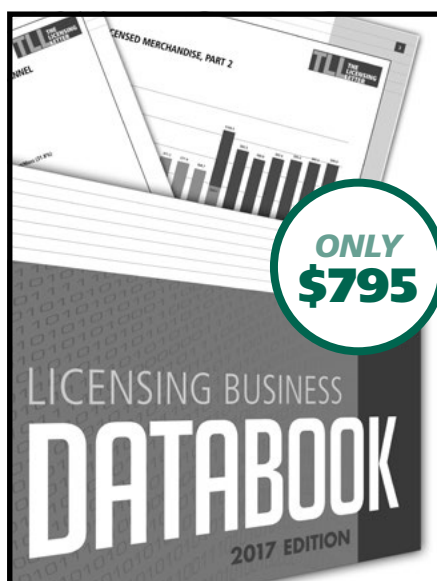
Topisatex, Sagrario Torre del Valle, Manager, 34 91 517 87 72, comercial@topisatex.com, P. 11.

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ENTERTAINMENT/CHARACTER

\$100 Million Superhero Brands Grow 15% in 2016

While the average \$100 million entertainment/character brand grew 8% in retail sales of licensed merchandise in 2016 for the U.S./Canada, superhero brands grew by nearly 15% from the previous year.

The top four superhero brands by retail sales in the U.S./Canada made up almost 11% of the \$100 million list's total retail sales globally. In the U.S./Canada alone, these four brands added almost \$250 million in value to the list compared to 2015.

In the U.S./Canada, Batman led retail sales of licensed merchandise. Marvel Avengers climbed to the No. 2 spot, overtaking Spider-Man.

1. Batman (Warner Bros.)
2. Marvel Avengers (Disney)
3. Spider-Man (Disney)
4. Superman (Warner Bros.)

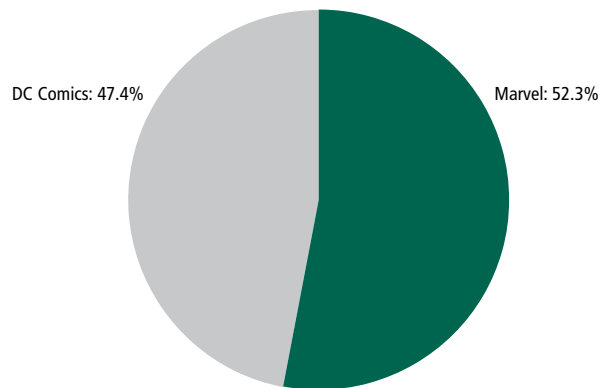
Keep in mind that the split between these top properties is quite narrow—Warner's superhero properties accounted for 52.4% of \$100 million superhero sales, while DC Comics nabbed a 47.6% share.

On a global scale, Spiderman leads the pack—it's the most popular property outside of the U.S./Canada, with only 30% of its sales based in the territory. The ranking remains unchanged from 2015.

1. Spider-Man (Disney)
2. Marvel Avengers (Disney)
3. Batman (Warner Bros.)
4. Superman (Warner Bros.)

According to Warner Bros., consumers spent \$4.5 billion on DC Comics merchandise in 2016—that includes Batman and Superman (around 40% of the total) as well as properties like Suicide Squad, Harley Quinn, The Joker, Flash, Arrow, and Supergirl.

LICENSOR SHARE OF RETAIL SALES OF LICENSED MERCHANDISE BASED ON \$100 MILLION SUPERHERO PROPERTIES, U.S./CANADA, 2016



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

Wonder Woman is expected to reign in 2017 thanks to her breakout solo film and the *Justice League* film. (Was it just poor timing? The film had the worst opening weekend of a DC Universe film in the last 5 years, at \$280 million globally.)

Both Marvel and DC are keeping their respective superhero universes alive with a steady stream of comic books, collectible figures and other merchandise, films, and—of course—streaming TV series. Both Warner and Disney have announced plans for their comic empires to have their own streaming channels by 2019, and the studios are actively developing new content.

One thing is clear: Superheroes are hard to kill.



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RETAIL

Mass Channels Lead Corporate TM/Brand-based Licensed Sales

As noted on page 6, the reason royalties for trademarks/brands are historically lower is, in part, a consequence of many licensed goods being sold through the mass retailer channels. So, while the low overhead in these stores brings prices (and royalties) down, the difference in profits compared to other channels is made up with a greater volume of sales.

Discounters commanded a 36.0% share of all trademark/brand-based licensed goods sold in 2016, followed by supermarkets/grocery stores (28.1%) and dealers, wholesalers, and distributors (12.1%).

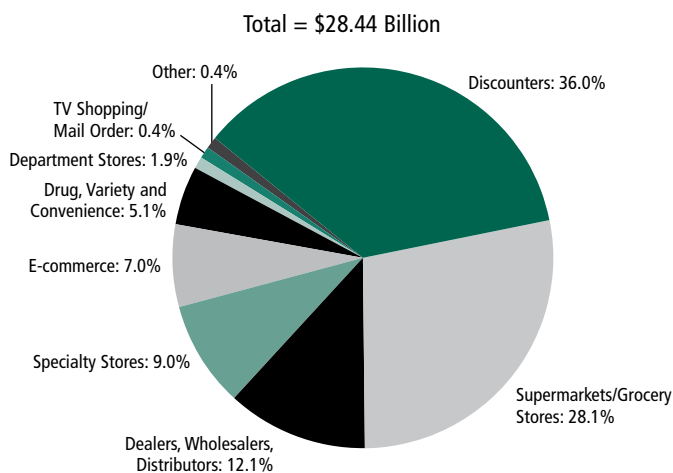
But over the last five years, that picture has been slowly shifting. Discounters contracted by 0.8% and dealers, wholesalers, and distributors by 3.2%. Despite the channel's decline in share however, real dollar sales grew due to the growth of trademark/brand licensing overall.

Meanwhile, supermarkets/grocery stores grew by 6.8% in share, mostly thanks to the growth in the food/beverages-based licensing subcategory. Unsurprisingly, ecommerce saw the biggest growth, expanding 79.5% over a five-year period. Equally shocking,

the TV shopping/mail order channel was down 78.9% over the same period.

The only channels that saw a real dollar decline in retail sales from 2011 to 2016 were TV shopping/mail order (shrinking \$365 million), department stores (-\$14 million), and drug, variety and convenience stores (-\$10 million). In the grand scheme of things, that's a ridiculously tiny fraction of all retail sales. No channel saw a decline in sales in 2016, compared to the previous year.

RETAIL SALES OF LICENSED TRADEMARK/BRAND MERCHANDISE, BY DISTRIBUTION CHANNEL, U.S & CANADA, 2016



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

Representative Retail Stores By Distribution Channel

Mass/Discount/Club/Big Box:
BJ's, Costco, Kmart, Sam's, Target, Toys 'R' Us, Walmart

Specialty Stores:
Ace Hardware, Barnes & Noble, Bass Pro, Bed Bath & Beyond, Best Buy, Cabela's, Cracker Barrel, Dick's, Forever 21, GameStop, H&M, Home Depot, Limited, Lowe's, Michaels, Modell's, museum stores, PetSmart, Sherwin-Williams, Sports Authority, Staples, Zara

Department Stores & Mid-tier:
Bloomingdale's, Dillard's, JCPenney, Kohl's, Macy's, Neiman-Marcus, Sears

Grocery and Drug:
Ahold, Aldi, CVS Caremark, Giant Eagle, Kroger, Meijer, Publix, RiteAid, Safeway, ShopRite, Walgreen

Dollar/Value/Off-Price:
Amazing Savings, Big Lots, Dollar General, Family Dollar, Ross Stores, Save Mart, Supervalu, TJ Maxx

Online/E-commerce:
Amazon, Café Press, Gilt, Zappos, Zazzle

Variety and Convenience:
7-Eleven, Circle-K

TV Shopping:
HSN, QVC, ShopHQ

Mail Order:
Oriental Trading, Signals

Other:
Kiosks, on-site, vending, and more

HOME

Licensed Home-related Goods Up 3.4% WW in 2016

Retail sales of licensed home furnishings, housewares, and domestics grew by 3.4% globally, according to *The Licensing Letter's Annual Licensing Business Survey*.

Growth was largely thanks to returns in consumer confidence and economic stability. Retail played a strong role in supporting the growth of a wide variety of brands, as the home goods market is increasingly embracing shorter seasons and frequent overturn to keep shelves fresh.

The U.S./Canada territory dominates licensed retail sales share, but the rest of the world saw rapid growth (8.2%) in 2016. Growth was especially strong in territories like Asia and the Middle East & Africa, largely due to the smaller dollar share amount. Growth in Europe was somewhat flat in 2016 but is expected to pick up in 2017.

Among property type trends, the broader home goods category is also looking outside of a predominantly art-based licensing model to include property types like corporate trademarks, digital influencers and brands, and fashion designers.

In the U.S./Canada, growth was relatively slower at just 2.0% for the category (combined furniture/home furnishings, housewares, and domestics categories). Home-related licensing was up overall, as consumers were eager to spend on home renovation and decorating.

- ▶ Domestics were up 2.0%, largely in part because of corporate/trademark and fashion designer brands. Sales in textiles were soft in 2016, but products like bedding and rugs performed well overall.
- ▶ Housewares were up 1.3%. The biggest growth was in small, cheap goods, home decor, and accents.
- ▶ Furniture and home furnishing sales were up 2.5%

as manufacturers and retailers tapped more fashion and surface designers for innovative ideas.

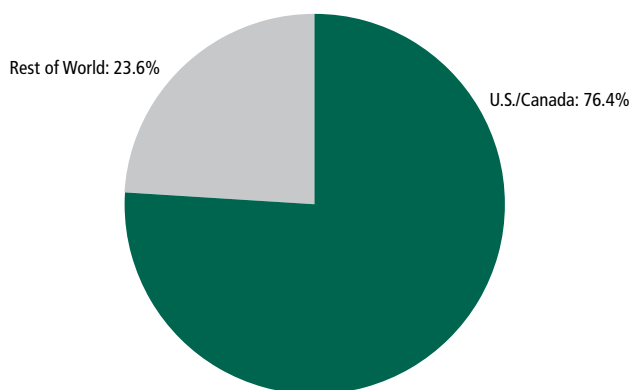
- ▶ Hardware and paint sales were up 3.4% thanks to corporate/trademarks, celebrity, and fashion brands.
- ▶ Gardening was up 1.3%.

Below, we've also included "Other" property type sub-categories for hardware/paint and gardening to provide a broader picture of licensing in the U.S./Canada; these retail sales are included in "Other" for the worldwide calculations and are therefore not included in the home furnishings/housewares/domestics product category.

Royalty rates in the U.S./Canada have remained flat over the years. Domestics command the highest royalties, in part because entertainment/character licensing commands a higher share of licensed goods sold. Housewares, on the other hand, has a higher share of art-based licensed brands.

Millennials are the largest growth drivers for home-related goods like furniture and bedding as they move out and establish new homes. They're also leading the charge in one of the fastest-growing distribution types—e-commerce. Ecommerce accounted for 21% of total furniture sales in 2014, and it is forecast to grow to 30% by 2018, according to research firm eMarketer.

RETAIL SALES OF LICENSED HOME FURNISHINGS/ HOUSEWARES/DOMESTICS, WORLDWIDE, 2016



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

SOURCE: THE LICENSING LETTER

RETAIL SALES OF LICENSED HOME FURNISHINGS/ HOUSEWARES/DOMESTICS, 2015–2016 (Figures in Millions)

TERRITORY	RETAIL SALES, 2016	RETAIL SALES, 2015	CHANGE, 2015–16	SHARE, 2016
U.S./Canada	\$9,645	\$9,460	2.0%	76.4%
Rest of World	\$2,984	\$2,758	8.2%	23.6%
Total Worldwide	\$12,629	\$12,218	3.4%	100.0%

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

SOURCE: THE LICENSING LETTER

RETAIL SALES OF LICENSED HOME-RELATED GOODS, U.S./CANADA, 2015–16 (Figures in Millions)

PRODUCT CATEGORY	RETAIL SALES, 2016	RETAIL SALES, 2015	CHANGE, 2015–16	SHARE, 2016
Domestics	\$3,550	\$3,480	2.0%	34.8%
Furniture/Home Furnishings	\$3,189	\$3,111	2.5%	31.2%
Housewares	\$2,906	\$2,869	1.3%	28.5%
Hardware and Paint	\$333	\$322	3.4%	3.3%
Gardening	\$229	\$226	1.3%	2.2%
Total	\$10,207	\$10,008	2.0%	100.0%

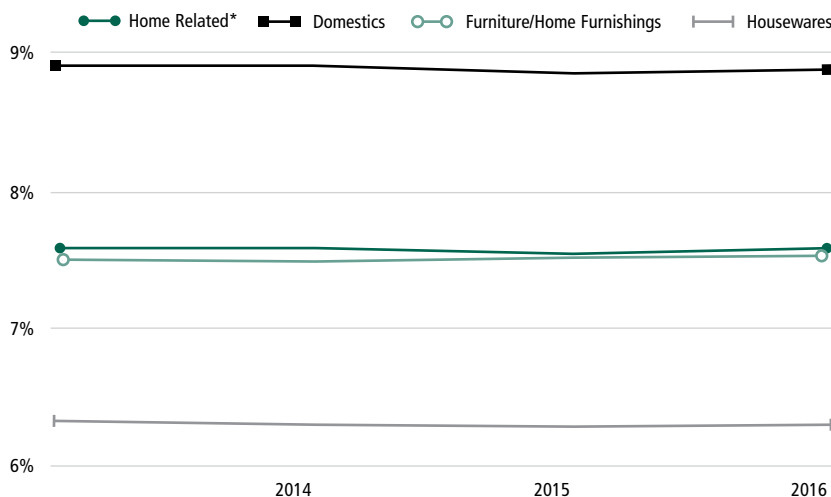
Note: Numbers may not add up exactly due to rounding.

SOURCE: THE LICENSING LETTER

Amazon, in particular, is reaping the rewards. The ecommerce giant held an estimated 17% market share in home furnishings in 2016, according to Morgan Stanley. And according to One Click Retail, Amazon's share of overall housewares sales was 8.5% in 2016, up from 6.8% in 2015. One Click Retail estimates that Amazon counted \$2.3 billion in furniture sales (and that its furniture sales are up 50% YTD through Q3 2017) and \$7 billion in housewares sales in 2016 (up 33% from 2015).

According to HomeWorld Business, the biggest retailers based on retail sales of housewares in 2015 (latest figures available) were Walmart, Costco, and Target. Today, we estimate that retailers like Williams-Sonoma (net revenue up 2.2% in 2016), Wayfair (up 59.7%), and Amazon (general merchandise net sales up 28.7%) command a higher share of the pie.

ROYALTY RATES OF LICENSED HOME-RELATED GOODS, U.S. & CANADA, 2016



Notes: *Average calculated from domestics, furniture/home furnishings, and housewares royalty rates. Numbers may not add up exactly due to rounding.

SOURCE: THE LICENSING LETTER

TOYS/GAMES

Toycos Detail Q3 Declines

Toys 'R' Us' bankruptcy is one reason for the hiccup to bottom lines of major toy companies, but they're also reporting soft interest in licensed products.

Hasbro's revenue rose by 7% to reach \$1.8 billion in Q3 2017. The toyco adjusted its projection for Q4 2017, lowering expectations to 4–7% growth over the same period last year. Despite an increase in gaming and franchise brand sales, its partner brands segment saw revenue decrease by 2% to \$485.7 million. While sales for branded Beyblade, Star Wars, Disney Descendants, and Sesame Street toys saw gains, growth was offset by declines in brands like Yo-Kai Watch and DreamWorks' Trolls. Hasbro's entertainment and licensing segment saw a 4% increase in net revenue.

Mattel reported a decline in sales for Q3 2017, with worldwide net sales sinking 13% to reach \$1.56 billion. In North America, sales were down 22%—\$885.8 million compared to \$1.13 billion in Q3 2016. Worldwide, gross sales for Barbie were down 6%, and other girls' brands were down 40% thanks to declines in Monster High and DC Super Hero Girls. The entertainment segment was up by 1% thanks to Disney Cars, although licensed Minecraft and WWE toys declined. In the Fisher Price segment, Mattel noted soft demand for Thomas & Friends and infant products (the entire category was down 15% in worldwide gross sales). American Girl was down 30% in part because of lower licensing income. These reports follow similarly weak performance in Q1 and Q2.

Jakks Pacific reported net sales of \$262.4 million in Q3 2017, down 13% from the same period last year. Jakks pointed to paused shipments to TRU as a major reason for the dip. In Q2, the toyco also saw declines from lowered demand for film-based licensed toys. Despite the dip, Q3 saw growth in a number of product lines and Jakks is looking to licenses like Pixar's *Incredibles 2* to generate sales in 2018. The company's Studio JP is also developing a new franchise with a toy line slated for launch in fall 2018.

Vendors Are Back With TRU

According to a bankruptcy lawyer representing TRU, 100% of merchandise vendors that supply the top 20 products are actively shipping, followed by 49 of the top 50 vendors and 91 of the top 100. When TRU filed for Chapter 11, nearly 40% of its trade base had stopped shipments.

Among those vendors is Hasbro, which reached an agreement with TRU where the toyco will receive "critical vendor" status marking its supply as essential to the toy chain's survival. Hasbro was owed \$59 million at the time TRU declared bankruptcy, and the move means payments will continue to roll in and Hasbro's 2018 earnings will remain unaffected.

TRU still owes creditors \$5 billion, and some smaller toycos have decided to opt out entirely. The retailer's unsecured creditors committee, which includes Mattel, LEGO Systems, and Simon Property Group, plans to investigate its financial transactions made before the Chapter 11 filing.

Keeping Up With the Kardashians

Kim Kardashian launches her first direct-to-consumer venture in the fragrance category under her **KKW Beauty** brand. The limited-edition fragrances are first come, first serve—but the star also plans to release new scents in time for Valentine’s Day. Sales were exclusively digital, albeit with a small launch at e-commerce site **Violet Grey’s** store on Melrose Place.

Although she partnered with licensee **Lighthouse Beauty** for fragrance in 2012, this time, Kim is going it alone. And *WWD* reports that retail sales for Kardashian-branded fragrance are expected to exceed the \$10 million estimated for 2012 and can reach up to \$50 million from this launch and upcoming 2017 lines. *TMZ* reports that Kim sold \$1 million worth of fragrance in the first hour, and \$10 million in the first day—she’s expected to sell out 300,000 bottles for a grand total of \$14 million in sales in under a week.

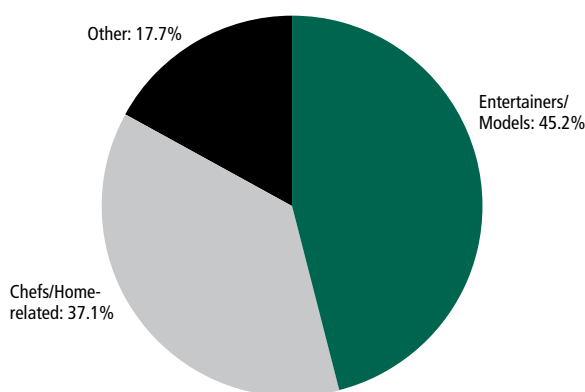
The Big Picture

Retail sales of licensed merchandise based on celebrities grew 1.9% in 2016, reaching \$5.8 billion in licensed retail sales in the U.S./Canada. Growth in the property type is largely thanks to digital celebrities, who are in and dominate the “Other” category. Entertainers/models, the largest subsector at \$2.6 billion, grew at a more modest 1.3% clip.

But growth in celebrity-based licensed sales isn’t necessarily representative of celebrity-branded sales generally. As it’s becoming easier, cheaper, and quicker to develop products alone, more celebrities are taking up the challenge.

While a star might make a foray into licensing deals at the beginning of their career, like the Kardashians, it is increasingly more likely that they won’t stay the course. One key reason (apart from a greater share of profits) is

SHARE OF RETAIL SALES OF LICENSED MERCHANDISE BASED ON CELEBRITY PROPERTIES, BY TYPE, U.S. & CANADA, 2016



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

SOURCE: THE LICENSING LETTER

THE CRYSTAL THEME FOR THE BOTTLES WAS INSPIRED BY THE ACTIONS OF HER FRIENDS AFTER A PARIS ROBBERY WHERE SHE WAS HELD AT GUNPOINT

the fact that consumers are demanding greater control by the celebrity over products they endorse.

And here, the story behind Kim’s fragrance line was very personal. The crystal theme for the bottles was inspired by the actions of her friends after a Paris robbery where she was held at gunpoint—they would bring her healing crystals. Each purchase came with crystals in addition to the perfume. Developing the three scents—Crystal Gardenia, Crystal Gardenia Citrus and Crystal Gardenia Oud—was about “being calm and healing,” Kim told *WWD*.

That kind of storytelling power, coupled with Kim’s reportedly extensive input in the fragrance’s scent and design, was essential to driving sales. A limited run also reinforced the personal connection between the star and her fans—and ensures that the fragrance will never be seen on clearance racks. (But seen on eBay for surprisingly relaxed prices? Sure.)

Take it Up With the Judge

I doubt the reality TV empire will go back to a licensed business model—after all, one of the Kardashian’s previous deals is still being litigated. In the latest update to the case, the 9th Circuit upheld the lower court’s temporary injunction against licensee Haven Beauty (a company of Hillair Capital Management) from continuing to use the Kardashians’ trademarks without shelling out royalties, even after the licensing agreement was terminated. *2Die4Kourt v. Hillair Capital Mgmt., LLC*, 692 Fed. Appx. 366 (9th Cir. 2017). Some interesting points from the hearing:

Hillair’s lawyers offered up an interesting reason as to why the licensee did not pay up—if you recall, the licensing agreement included a provision that royalties would become due only when the Kardashians generated an invoice. Apparently, this clause was bargained for by the sisters because of concerns about when taxes were due on the royalty payments. As we noted previously, the lower district court did not cite this clause in the prior decision.

Here, the 9th Circuit considered an alternate provision in the agreement (stating that the failure to issue timely invoices wouldn’t nullify the duty to make payments generally) and the requirement of guaranteed minimum quarterly payments (which the Kardashians later gave up) to interpret the contract as requiring some regular, quarterly, form of payment. This is despite the fact that the agreement didn’t state when such payments were due, except within five days of an invoice.

Of course, this argument smells largely of the fabrications of lawyers—last year, Hillair sued the Kardashians for \$180 million. Correspondence at the time indicates that the licensee was looking to offset those losses against royalty payments due. Either way, both sides were acting badly. The lawyer for the Kardashians blamed the fight on “both sides’ bad investment” fueling an “acrimonious ... marriage of necessity.”

Under these facts and the terms of the licensing agreement, it’s hard to say that the court is standing on firm footing—but, understandably, it is hesitant to diverge from the established rule. Under California state law, once a license agreement is terminated, the licensee cannot continue using the mark. Even when a licensor improperly terminates an agreement, the licensee has only two options:

1. Consider the contract terminated and stop performance, forfeiting the right to continue to use the trademark.
2. Continue making royalty payments under the license agreement, continue using the trademark, and then sue for damages.

In the end, who knows what will happen. The case is just a small piece of the puzzle—the parties are duking out the bigger, central claims of fraud and breach of contract in an ongoing arbitration.

But that’s not the end of things—according to *TMZ*, the Kardashian’s former agency, Agency for the Performing Arts (APA), is suing the sisters for breach of an oral contract (*why* was it not in writing?) that gave the agency a 15% cut of all endorsement deals it negotiated. The Kardashians dropped APA in March 2015 “for being incompetent and breaching their fiduciary duties, which cost the Kardashians and Jenners hundreds of millions of dollars,” according to their legal team. Apparently, APA was the one responsible for issuing invoices in the Hillair case, amongst other things.

Regarding the KKW Beauty brand, a Danish makeup artist is suing the Kardashians for trademark infringement, claiming that KKW is confusingly similar to her own brand, KW, under which cosmetics, makeup, and skin care products are manufactured by licensee Kjaer Weis. For the Kardashians, Seed Beauty designs, manufactures, and distributes KKW Beauty products. *Weis v. Kimsaprincess Inc.*, No. 17-cv-05471, 2017 BL 388118 (N.D. Ill. Oct. 30, 2017). If you thought it strange that the suit was filed in Illinois, the district court agrees—the case is moving out west to Los Angeles.

We could comment on the civil suits by and against the Kardashian clan—some of the complaints are absolutely savage—but will only note that they don’t seem to have much impact on retail sales of their branded goods.

TOYS/GAMES

Roundup: Robotics, Video Games, and the IoT

Lucasfilm gathered **Facebook**, **Fitbit**, **Industrial Light & Magic**, **Instagram**, **Twitter**, and **Google** together to inspire the next generation of inventors at the first-ever Droidathon, an invention competition running from Nov. 15–Jan. 10. Using the littleBits Droid Inventor Kit as a starting point, teams of kid engineers, programmers, and designers created innovative robots.

Mattel and **Pixel Press** team up with **Lucasfilm** to launch Star Wars Bloxels, a new educational line that encourages youngsters to create their own video games. The build-and-play platform uses brightly colored blocks and a Death Star-themed game board to customize, build and share games.

Marvel cuts ties with **Gazillion Entertainment**, maker of MMO video game *Marvel Heroes*. The free-to-play game was beset with problems

following rounds of internal layoffs at the game published. The game was online for four years and will phase out into the new year.

User-generated gaming platform **Roblox** signs a licensing deal with **Bioworld**, which will release branded apparel in stores across North America this fall.

Consumer Sentiment

An **Amazon**-backed survey study from the Family Online Safety Institute (**FOSI**) reveals that 70% of parents are comfortable with their child having a connected device or toy. Nearly half of connected children have three or more devices—50% of parents reported that their child has a video game console, 32% a WiFi-enabled device like a cell phone or music player, 29% a computer, and 10% a wearable device like a smartwatch or fitness tracker. In the home

generally, 23% of families have a smart speaker, such as Amazon Echo or Google Home, and 67% have a smart TV. FOSI reports that the top concern for parents of connected children is the prospect of bad actors communicating with children or locating them with GPS tracking.

Meanwhile, U.K. consumer rights group **Which?** warns parents about the risks of giving connected toys to their children. The group published specific findings on four different toys—Furby Connect, I-Que Intelligent Robot, Toy-fi Teddy, and CloudPets cuddly toy. Which? highlighted insecure Bluetooth connections, unencrypted voice recordings in publicly accessible online databases, and other vulnerabilities that might make it possible for people to re-engineer a connected device’s firmware and turn the toy into a listening device.

HOLIDAY SPENDING

Tis the Season to be Creepy

This Halloween season is expected to generate a record \$9.1 billion in spending with 72% of American adults celebrating, according to the National Retail Federation (NRF). Costumes make up the largest share of spending, coming in at an estimated \$3.4 billion in total. Pets aren't left out—about 10% plan to dress their furry friend in a pumpkin costume.

Discount and specialty stores are the top shopping destinations (47%), followed by Halloween stores (38%), grocery stores (25%), department stores (24%), and online (22%; multiple responses allowed). Interestingly, interest in home décor and home improvement stores grew over 20% since 2016. (For example, *Game of Thrones* fans are using Ikea rugs as capes; Google ranks Daenerys Targaryen as its 46th most popular costume.)

Most Popular Costumes

The NRF says that this year, 17% of consumers will be inspired by pop culture, up from 12% last year. This is especially apt for the younger set—34% of those aged 18–24 say the same.

According to the NRF, most Americans planned to costume themselves (and their pets) as a favorite DC Comics or Marvel superhero, Star Wars character, or Disney Princess.

While Wonder Woman ranks lower on NPD's list, according to Google's Frightgeist service, she is the top costume choice for revelers this holiday season.

For the Google Frightgeist ranking, we only included properties that have some identifiable licensing program. Filling in the top 10 list of costumes for Google's list are clown (No. 3), unicorn (4), rabbit (5), witch (6), mouse (7), pirate (8), zombie (9), and dinosaur (10). Superhero clocked in at No. 14.

TOP HALLOWEEN COSTUMES, 2017			
RANK	CHILDREN	ADULTS	PETS
1	Action/Superhero	Witch	Pumpkin
2	Batman/Princess*	Batman	Hot dog
3	Animal	Animal	Dog/Lion/Pirate*
4	Spider-Man	Pirate	Bumble bee
5	Star Wars	Marvel	Devil
6	Witch	Vampire	Batman
7	Pirate/Marvel (excl. Spider-Man)*	Zombie	Ghost
8	Disney Princess	DC Comics (excl. Batman, Wonder Woman)/Star Wars	Cat
9	Ghost	Slasher movie villain	Witch
10	Wonder Woman	Wonder Woman	Star Wars

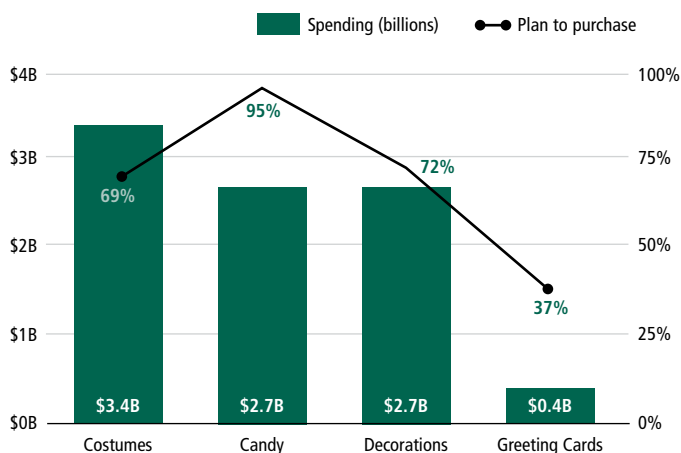
Note: *Tied.
SOURCES: NRF, THE LICENSING LETTER

Other notable entries from the Frightgeist ranking are Mario (No. 37), Catwoman (41), Mickey Mouse (42), Power Rangers (43), Daenerys Targaryen from *Game of Thrones* (46), Paw Patrol (47), and Lego (50). The female Joker was its own category, ranking in at 381.

As for the “slasher movie villain” characters identified by NPD as American adult's most popular choice, the research firm cited Jason and Scream as popular examples. Epoll's index identifies a few more, not all of which are specifically indexed by Google.

For the characters that are ranked by Google, Chucky ranks in at 25, followed by Freddy Krueger (No. 121), Annabelle the Doll (184), and Jigsaw (332).

AMERICAN HALLOWEEN SPENDING, 2017



Note: Numbers may not add up exactly due to rounding.
SOURCES: NRF, THE LICENSING LETTER

TOP HALLOWEEN COSTUMES, 2017			
RANK	CHARACTER	FRANCHISE	LICENSOR/AGENT
1	Wonder Woman	DC Comics	Warner Bros.
2	Harley Quinn	DC Comics	Warner Bros.
16	Steven King's IT	—	Warner Bros.
17	Batman	DC Comics	Warner Bros.
21	Belle	Disney Princess	Disney
23	Joker	DC Comics	Warner Bros.
25	Chucky	Child's Play	Universal
28	Spider-Man	Marvel	Disney
29	Minnie Mouse	—	Disney
30	Star Wars	Lucasfilm	Disney

SOURCES: Google Frightgeist, THE LICENSING LETTER

AMERICA'S CREEPIEST CHARACTERS

RANK	CHARACTER	FRANCHISE	LICENSOR/AGENT
1	Pennywise the Clown	Steven King's IT	Warner Bros.
2	Twisty	American Horror Story	20th Century Fox
3	Anabelle the Doll	The Conjuring	Warner Bros.
4	Freddy Krueger	A Nightmare on Elm Street	Warner Bros.
5	Dr. Hannibal Lector	Silence of the Lambs	MGM
6	Jigsaw	Saw	Lionsgate
7	Norman Bates	Psycho	Universal
8	Count Olaf	A Series of Unfortunate Events	HarperCollins/Netflix
9	Leatherface	Texas Chainsaw Massacre	Lionsgate
10	Chucky	Child's Play	Universal

SOURCES: Epoll, THE LICENSING LETTER

Clowning Around

One of the major trends this season is the creepy, scary, and lovable clown. Number 3 on Google's list of most popular costumes is the helpful "clown" category.

So, aside from Steven King's Pennywise (which isn't ranked by Google as a discrete term), who are the most

popular clowns? Epoll offers a hint at who you might see parading around town.

Surprisingly, the list includes decidedly not-creepy characters like The Three Stooges and The Little Tramp as well as the fast food mascots from McDonald's and Jack in the Box.

AMERICA'S FAVORITE CLOWNS

RANK	CHARACTER	FRANCHISE	LICENSOR/AGENT
1	Harley Quinn	DC Comics	Warner Bros.
2	Chip Baskets	Baskets (TV series)	20th Century Fox
3	The Three Stooges	—	C3 Entertainment
4	Twisty	American Horror Story	20th Century Fox
5	The Joker	DC Comics	Warner Bros.
6	The Little Tramp	Charlie Chaplin	Chaplin Office/Bubbles Inc.
7	Krusty the Clown	The Simpsons	20th Century Fox
8	Pennywise the Clown	Steven King's IT	Warner Bros.
9	Jack	—	Jack in the Box
10	Ronald McDonald	—	McDonald's

SOURCES: Epoll, THE LICENSING LETTER

SPORTS

Sports-based Brands & Goods Score a Goal

Retail sales of sports-based licensed merchandise grew 3.5% worldwide in 2016—and in the U.S./Canada, growth exceeded 4% to reach \$15.4 billion in licensed retail sales. Soccer is one of the fastest-growing segments, growing over 10% year-over-year in retail sales.

Fanatics secures a \$1 billion investment from Japanese **SoftBank** Group Corp.'s Masayoshi Son, *Bloomberg* reports. With the funds, the ecommerce company now aims to export the "American way of buying sports merchandise" worldwide. Fanatics' international sales currently amount to approximately \$200 million—and it is now targeting markets like the U.K. and China with the goal of quintupling annual sales to \$10 billion over the next five years. International sales are expected to make up about a half of the company's \$10 billion target.

Fanatics seeks to open new manufacturing facilities in Germany and China in 2018, then in Japan and Australia in 2019. Local interest in Chinese soccer is expected to grow exponentially—Euromonitor estimates that attendance has increased over 10% a season, every season, since 2014. At that rate, attendance at **Chinese Super League** clubs would surpass that of the European **Premier League's** by 2020.

Time Inc. launches OTT channel Sports Illustrated TV on **Amazon** Channels. The network debuts with a slate of 130 hours of on-demand programming, including original documentary series, weekly studio shows and acquired sports movies, documentaries and TV shows. The platform signed with Mike Tollin, co-chair of Mandalay Sports Media, and Jonathan Hock, for two different sports documentary projects slated for 2018.

The first soccer apparel brand dedicated to female players, **Goal Five**, launches. The performance and lifestyle collection is designed to celebrate the women of soccer, with 5% of profits being used to advance gender equality around the world. According to FIFA data, more than 30 million female athletes worldwide participate in organized soccer, with 15 million in the U.S. and Canada alone. Numbers are projected to reach 40 million worldwide by 2030.

Mattel releases its first hijab-wearing Barbie doll. The face of the doll is modeled on American fencer Ibtihaj Muhammad, who won a bronze medal in Rio last year and was the first U.S. woman to wear the Islamic headscarf while competing at the Olympics. The doll is decked out in full fencing gear including a mask, sabre, and training shoes.

RETRO

Guess Who's Back

Nostalgia remains strong for retro brands—and it's not just '50s and '60s-inspired designs, icons, and goods. The '90s counts, too.

Epic Rights signs *NSYNC, one the bestselling bands of all-time with over 70 million records sold, in time for the 20th anniversary of the pop group's first studio album in 2018. Epic plans to develop a new line of retro 90's pop culture-inspired fashion apparel and accessories, electronics, seasonal and home décor, games, collectible figures, slot machines, and more. The agency is also managing the group's online presence and official website promotions.

Nickelodeon announces that its '90s horror TV series, *Are You Afraid of the Dark?*, is getting the movie treatment. **Paramount Players** will produce, with Gary Dauberman (*It: Chapter Two*, *Annabelle: Creation*) on board to handle scripting duties. Nick recently revived *Hey Arnold* and *Rocko's Modern Life* with special TV movies.

And Nick's *Dora the Explorer* series is getting a live action, big screen project (also with Paramount Players) aimed to hit theaters in 2019. Nick Stoller (*The Muppets*, *Neighbors*) will work on the script. The film features Dora as a teenager who moves to the city to live with her cousin Diego.

Warner Bros. Consumer Products partners with California streetwear brand **The Hundreds** for the launch of "The Hundreds X Animaniacs" apparel collection. Animaniacs ran for 99 episodes from 1993 to 1998, and was the launching point for central characters from *Pinky and the Brain* and the *Goodfeathers*. The collection pays tribute to the dynamic, titular trio of Yakko, Wakko, and Dot, as well as Pinky and the Brain.

Nintendo is in talks with **Illumination Studios** to produce an animated *Super Mario Bros.* film. The video game company will be involved in the creative process, with series' creator Shigeru Miyamoto likely to serve as a producer. Nintendo was also in talks with Sony, but it's assumed it will go with Illumination—parentco **Universal** is currently working on Super Nintendo World, expected to launch in time for the Tokyo Olympics at Universal Studios Japan in 2020.

The Smiley Co. brokers a deal between its Rubik's toy brand and **Paragon Creative** in which Paragon is named official design & build partner for the themed attractions category. Paragon is seeking partners in the mall and themed attractions space for a range of concepts which include escape rooms with a VR element and a range of family activities including soft play, climbing, crazy golf, and logic based mazes.

Funko announces new figures for **Kurt Cobain**, **Elton John**, and **Jerry Garcia**. They join a current lineup that includes Metallica, Guns N' Roses, Jimi Hendrix, Lemmy, Ozzy Osbourne, and KISS.

EXPERIENTIAL

Roundup: Theme Parks

New *Peppa Pig* location-based attraction formats and themed accommodations will roll out thanks to a partnership between **eOne** and **Merlin Entertainments**. The deal covers all territories worldwide excl. the U.K., and Merlin secured exclusive rights for all location-based entertainment formats with the exception of China, which will be licensed to Merlin on a non-exclusive basis. Merlin expects to open in-park areas in two Resort Theme Parks in 2018; the first standalone attraction will open in 2019.

Warner Bros. Consumer Products, **DC Entertainment**, and **Miral** reveal the themed worlds in the upcoming theme park Warner Bros. World Abu Dhabi:

1. Metropolis and Gotham City, inspired by the DC Super Hero universe;
2. Cartoon Junction, which will bring together Bugs Bunny, Scooby-Doo and other famous cartoon characters;
3. Bedrock, a prehistoric world where the modern stone-age family can have a "yabba dabba doo" time like *The Flintstones*;
4. Dynamite Gulch, which will take visitors deep into a Southwest American canyon to experience the antics of the "Looney Tunes" characters; and
5. Warner Bros. Plaza, which will be reminiscent of old Hollywood with Art Deco architecture and more.

The park will also be home to the only Warner Bros.-branded hotel. Construction is underway in anticipation of a 2018 open date.

This Christmas, the *Harry Potter Warner Bros. Studio Tour* will undergo a makeover—for the first time ever, the Great Hall stage will be decorated as it was for the iconic Yule Ball. The experience lands Nov. 18 thru Jan. 28.

Disney is updating its Star Wars-themed attraction, a 3D motion simulator ride called *Star Tours*. The new version of the ride will include a never-before-seen battle from *Star Wars: The Last Jedi*, opening Dec. 15.

In addition to the update, **Disney** is adding themed land *Star Wars: Galaxy's Edge* at Hollywood Studios, which is expected to debut in 2019, and an entirely immersive Star Wars-themed hotel to Walt Disney World.

In Pixar news, **Disneyland** Resort in Anaheim, Calif. will be home to a new land, Pixar Pier, featuring four Pixar-themed neighborhoods. The first neighborhood is inspired by *The Incredibles* and will open next summer with a new roller coaster. The second and third are inspired by *Toy Story* and *Inside Out*, respectively, and the fourth will celebrate a collection of guest-favorite Pixar stories, such as *A Bug's Life*, *La Luna*, and *Wall-E*. Pixar Pier is set to debut during Pixar Fest, launching April 13, 2018.

ROUNDUP

Experiential, Social & Media

Hasbro and **Cityneon** bring interactive exhibition *Transformers Autobot Alliance* to China in December 2017. The launch follows years of R&D—the walk-through exhibit is the first of its kind to showcase the larger-than-life robots, as well as special effects, reflex tests, virtual reality, motion sensing, and other features surrounding the Transformers brand. It will debut in a 15,000 sq. ft. space within high-end shopping and living center Shin Kong Place Chongqing. Cityneon has the right to tour the exhibition worldwide. Naturally, the event showcases a merchandise area for post-attraction purchases.

Twitter unveils new features on its social media platform for **NBA** fans this season. Activations include 30 team hashtag-triggered emoji; special league hashtag emoji using #NBA and #NBATwitter; live programs “The Starters Twitter Show” and “The Warmup”; and its data on the most-mentioned NBA teams and players entering the 2017–18 season as well as the top followed NBA teams and players.

Saban Brands launches *Power Rangers HyperForce*, an interactive tabletop RPG, through Amazon’s social Twitch service. The RPG will stream live on the channel Hyper RPG beginning on Oct. 24. Power Rangers’ 25th anniversary lands in 2018; this event marks the first licensed property to live-stream a tabletop RPG with Twitch. The game is set in the year 3016 and follows a team of Time Force Ranger cadets as they band together to defeat an ancient evil.

Warner Bros. Entertainment is set to shutter toys-to-life platform **LEGO Dimensions** one year ahead of plans, Eurogamer reports. Launched in 2015, the venture was expected to last three years. Sources cite the high cost of manufacturing the LEGO toys, poor sales, and over-saturation of new content as key reasons. Licenses include The Hobbit, Sonic the Hedgehog, Batman, and Scooby-Doo. Developer TT Games is now focusing on the LEGO Ninjago Movie game and LEGO Marvel Super Heroes 2.

Tough Mudder and **Invictus Events & Entertainment** Pty Ltd. partner to bring the obstacle course challenge to South Africa in 2018. The multi-year partnership with IEE in South Africa marks the first time Tough Mudder has licensed its signature challenges in the country and its first on the African continent.

Turner EMEA and Austrian start-up **Tonio** launch a live, interactive TV experiment inspired by *The Amazing World of Gumball*. Called Gumball VIP, the second screen experience uses Tonio’s audio-recognition tech to serve live quiz questions to fans via their mobile device while they’re watching the show.

Marvel’s third Thor film, *Thor: Ragnarok*, debuted with \$121 million, the fourth largest opening of 2017 so far. With

this latest film, Marvel Studios has now opened 17 films, which have collectively earned over \$5 billion at the box office in North America and over \$13 billion worldwide.

YouTube Red releases sci-fi/comedy film *Lazer Team 2*. The movie is a sequel to *Lazer Team*, the first-ever feature film from the digital media company **Rooster Teeth**.

ITV America signs an exclusive overall deal with literary manager and producer Sharlene Martin and the **Martin Literary & Media Management** that allows ITV to option any unscripted projects based on the literary works of Martin’s clients, who are primarily crime writers. Those clients include Anthony Flacco (novel currently in development as a feature for Warner Bros., with Clint Eastwood slated to direct), Shanna Hogan, and Andy Caldwell (his novel was the basis for A&E documentary O.J.: Guilty in Vegas).

Saban Brands is working on a new animated comedy/adventure series, *Rainbow Butterfly Unicorn Kitty*. The quirky series targets kids aged 6–11 and stars a magical cat that is part rainbow, butterfly, and unicorn. Saban is currently in talks with a global linear kids broadcaster, with plans to launch the show in the U.S. in fall 2018. Italian prodco **Rainbow** is on-board as a co-producer and will represent the property in Italy and other European territories. California’s **Funrise Toy** is the global master toy and co-production partner.

Disney’s Star Wars will see a new film trilogy from *The Last Jedi* frontman Rian Johnson, separate from the episodic Skywalker saga. The media giant is also planning a new live-action Star Wars TV series for its SVOD service to launch in 2019. Also headed to SVOD are original TV series adaptations of Pixar’s *Monsters Inc.*, Disney Channel’s *High School Musical* franchise, and something from the Marvel universe.

But *Star Wars: Episode IX* isn’t going to be the end for Rey, Finn or other characters introduced in *The Force Awakens*—**Lucasfilm** is planning to include them and others in the “next 10 years of stories,” according to President Kathleen Kennedy.

Lip-syncing app **Musical.ly** is acquired by Chinese internet giant Beijing **ByteDance** Technology Co. for a reported \$800 million. The app has deals to host original shows from studios like Hearst Magazines Digital Media, NBCUniversal, and Viacom. Musical.ly will continue to operate independently.

Emmy-award winning series *Trollhunters*, from creator Guillermo del Toro and **DreamWorks** Animation, will get two new interconnected shows. Set in the *Trollhunters* universe, the trilogy will be called the Tales of Arcadia

Continued on page 28

Continued from page 27

and includes *3 Below*, to be released in 2018, and *Wizards*, which will debut in 2019.

In Australia, Popeye will become the new face of **Tough Mudder's** Australian challenge throughout November. As a result of a partnership with **Merchantwise Licensing**, over 20,000 participants will interact with Popeye during a 3 month health-focused campaign through dedicated training microsite, obstacle course branding, social media platforms, event day and digital activations, and merchandise—an exclusive *Tough Mudder by Popeye the Sailor* man t-shirt will be made available.

Parques Reunidos partners with **Discovery Communications** to develop approximately 10 themed entertainment centers in North America, Western Europe, and Asia-Pacific. The integrated indoor entertainment centers will include interactive entertainment facilities, rides, a dining area, and a retail store.

Rovio is doubling down on its collaboration with heavy metal legends **Iron Maiden** to bring newly introduced mascot Eddie to the Angry Birds Evolution platform.

Cartoon Network partners with the Korean game developer **SundayToz** for a mobile puzzle game around animated series, *We Bare Bears*. The free match three-style and city-builder game will launch globally in early 2018.

Mondo Tees announces a new board game division, Mondo Games, which will focus on creating licensed games based on film properties including *Jurassic Park* and *Fight Club*.

Grocery chain **Kroger** introduces its new lifestyle apparel brand, Our Brand. The initial offering will be available for children, young men, juniors, and adults. It debuts at over 300 Fred Meyer and Kroger Marketplace locations throughout the U.S. in fall 2018.

Burberry's new CEO Marco Gobbetti, reveals plans to transform the British luxury brand into a super-luxe brand, like Gucci and Dior, which have higher prices and profit margins. The fashion brand will spend millions to transform its stores into "temples of luxury" and stop selling its trench coats and handbags through some department stores—expected to negatively impact sales in the short-term.

Mr. Bean cosplayers took over London to support the launch of mobile game Play London with Mr Bean, a tourism initiative from **VisitLondon.com**, **Endemol Shine Group**, and **Pointvoucher**. The free-to-play game helps visitors discover the city's highlights and collect discount vouchers and find offers.

Betty Page returns to **Playboy** (1955's Miss January) thanks to **Dynamite Entertainment**. The November/December issue will feature an exclusive six-page comic story. Dynamite launched its first Betty Page comic mini-series in July.

Snap brings its augmented reality dancing hot dog filter to life, selling an adult-sized Halloween costume on Amazon for \$79.99. The filter was a summer sensation; Snap has previously sold a ghost stuffed animal, playing cards, and a ghost backpack.



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