

TLL THE LICENSING LETTER

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It's Getting Crowded: A Census of Licensors

Over 2,500 unique companies own and license out intellectual property for branded consumer goods in the U.S./Canada. *TLL* breaks down the numbers behind the *Licensing Sourcebook* to discover where the money is—and for which property types the field is getting crowded.

Please note that this breakdown won't tell you the relative size of the licensing business—after all, it doesn't factor in retail sales activity generated by the efforts of licensing agents (approximately 1,300) and other service providers. We've noted *TLL's* figures for property type share by retail sales where appropriate. The number of licensing companies is based on aggregated listings in the *Licensing Sourcebook* as of January 2018. In the rare case that a company represents brands under more than one property type, that company is counted twice. Some categories have been merged to best represent the data.

Companies just dipping their toes in the licensing business (as a rule of thumb they won't have over \$500,000 in licensed retail sales) are not typically listed in the *Sourcebook*. Instead of taking on staff to strike new deals, these companies' brands will be represented by agents. Or they might not enter into traditional licensing arrangements at all, but instead order print-on-demand merchandise. Even if their volume is small, these goods are nevertheless one extra source of competition for licensed brands.

Only 12% of licensor companies in the *Sourcebook* are represented by at least one agent. Entertainment/character and video games/interactive/online licensors are the most likely to retain agents. Typically, these agents serve as point of contact for international territories in which the licensor does not have an office. In recent years, however, the trend has been for licensors to take on increasing ownership of their brand licensing business and establish their own presence in countries like China or India.

Keep in mind that among licensors, licensed retail sales range from under \$50,000 to over \$100 billion. The number of properties owned range from just one to thousands. Similarly, the number of employees dedicated to licensing at least part-time ranges from one to over one hundred. Despite these wide disparities, there are some trends that emerge when sorting these companies by the types of brands they own.

Entertainment/character & Trademark Licensors Overwhelm the Rest

By sheer numbers, the companies which license out entertainment/character- and corporate/trademark-based brands dominate the industry. Combined, the number of companies

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SALARY

Sports: A Closer Look

The impact of major sporting events—the Super Bowl and the Winter Olympics—on sports-based licensing is expected to be minimal in comparison with previous years.

Licensed retail sales of sports-based merchandise grew 4.3% in 2016 to reach \$15.4 billion in the U.S./Canada—the sixth straight year of sustained growth. This year, it remains to be seen if this kind of momentum can be sustained, at least in the first quarter—in part because the impact of the two biggest sporting events, the Super Bowl and the Winter Olympics, remains unclear.

Super Bowl Rumble

According to the generalists, all is supposed to be well for Super Bowl-related spending. The National Retail Federation projects that Super Bowl fans will spend nearly 8.5% more than they did last year, for a total of \$14.1 billion in retail sales.

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➡ Licensing Ledger

European investment fund **JAB Holding** is now the controlling stakeholder in a combined company with **Dr Pepper Snapple Group**. The combined company, Keurig Dr Pepper, is expected to bring in \$11 billion in annual revenues under the leadership of CEO Bob Gamgort. **Keurig** will own 87% of the company and Dr Pepper Snapple shareholders 13%. **Mondelez**, JAB's partner in Keurig, will hold a 13–14% stake in the combined company.

Bacardi Ltd. buys **Patrón Spirits Intl.** in a deal worth \$5.1 billion; the liquor company has held 30% stake in the tequila maker for the last decade. The deal makes Bacardi the second-biggest such company in the U.S. after Diageo.

Jakks Pacific receives non-binding proposal of interest from **Hong Kong Meisheng Cultural Co.**, a subsidiary of the California toymaker's Chinese distribution partner Meisheng Cultural and Creative Corp., to acquire a 51% stake in the company. If the transaction is completed, Meisheng's stake in Jakks would increase to 51%.

Toys 'R' Us receives the go-ahead from bankruptcy court to close 182 stores nationwide with "negative sales trends," out of a total of 900. The toy retailer expects to convert a number of existing locations into co-branded Toys 'R' Us and Babies 'R' Us stores. Closings will take place beginning in early February, with the majority of locations closing in mid-April. Up in Canada, all 83 locations are expected to remain open.

Walmart is joining hands with **Rakuten**; the two global powerhouses will form a joint venture to sell online groceries in Japan as well as ebooks and audiobooks in the U.S. Walmart's local Japanese retail brand, Seiyu GK, will collaborate with Rakuten to expand its online grocery delivery services and delivery area. Stateside, Rakuten's Canadian Kobo unit will work with Walmart to make its ebooks, audio books, and e-reader available for the first time online and in-store.

Supermarket giant **Kroger** is considering buying up both **Boxed.com** and **Overstock.com**, according to *The New York Post*. Boxed.com has also attracted the eye of Bed, Bath & Beyond for a potential acquisition.

Penske Media (owner of *WWD*, *Variety*, *Hollywood Life*, *Deadline.com*, and *Robb Report*) acquires a controlling stake in **Rolling Stone**. The magazine-based brand celebrated its 50th anniversary in 2017; it has grown into a multi-platform property that covers celebrity, pop culture, and politics.

HSN and **QVC** are now under one roof as the former's parentco Liberty Interactive completes its acquisition of the latter. The two will continue to operate as separate brands. QVC Group is expected to become an asset-backed stock in early 2018.

Funko acquires U.K.-based animation company **A Large Evil Corporation**, which will now operate under the name **Funko Animation Studios**.

Kids@Play is sold to industry veteran and Added Smile's Nathaniel Southworth. Malcolm Evans will work full-time with Southworth during 2018 to affect a comprehensive handover of the day-to-day running of the business. Evans will then assume the position of Chairman of the Board.

Bay Tek Games acquires boutique licensing and branding firm **Dimensional Branding Group (DBG)**. The designer and manufacturer of amusement games will

incorporate DBG as one of its divisions; the acquisition is expected to be a step towards Bay Tek's transformation into a multi-platform entertainment company.

Nickelodeon joins major studios like Warner Bros. and 21st Century Fox in a \$30-million Series B financing round for location-based VR startup **Dreamscape Immersive**. The startup will produce a VR experience based on Nick properties. Its flagship VR center is expected to open to the public at Westfield Century City Mall in L.A. in 2018.

Norwegian developer **Funcom** takes on \$10.6 million in new funding, in part to fund a licensing push through a new company, **Heroic Signatures**. It will hold and manage the interactive rights to IP including *Conan the Barbarian*, *Solomon Kane*, and *Mutant Chronicles*.

IMG completes its acquisition of global museum exhibition producer **Exhibitions Intl.** The business—which includes *King Tut: Treasures of the Golden Pharaoh*, *Pompeii: The Exhibition*, and *Mummies of the World*—will now sit within IMG's events division with Arts & Entertainment.

Elie Tahari and **Bluestar Alliance** joinhands to form new joint venture company, **TBH Brand Holdings**. Elie Tahari will contribute the IP for his Tahari and T Tahari brands while Bluestar will handle their day-to-day management and licensing worldwide. The new company will also manage the core Elie Tahari trademark, with a focus on expanding the brand's global presence and opening Elie Tahari retail boutiques throughout the world.

Separately, **Elie Tahari**, **Arthur Levine**, and **Les Schreiber**, form a new joint venture company, **TASL Brand Holdings**, for the Tahari ASL trademark. Levine will continue to spearhead the growth of Tahari ASL.



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It's Getting Crowded

Continued from page 1

under these two banners constitutes almost half (45%) of the total *Sourcebook* listings. Naturally, these categories also see the largest variances when comparing any two companies.

Ranked in order by sheer number of companies, here are the top property types—not that much different from an accounting of the companies that regularly appear at trade shows:

1. Entertainment/character
2. Trademarks/brands
3. Fashion
4. Art
5. Video games/interactive/online
6. Publishing
7. Traditional toys/games
8. Sports & collegiate
9. Non-profit
10. Celebrities & estates
11. Music

Source of Licensable Properties in the U.S./Canada

On average, companies involved in licensing count 5.7 properties under their belt. Unsurprisingly, on the low end of the scale, art and non-profit licensors count the least amount of IP, on average.

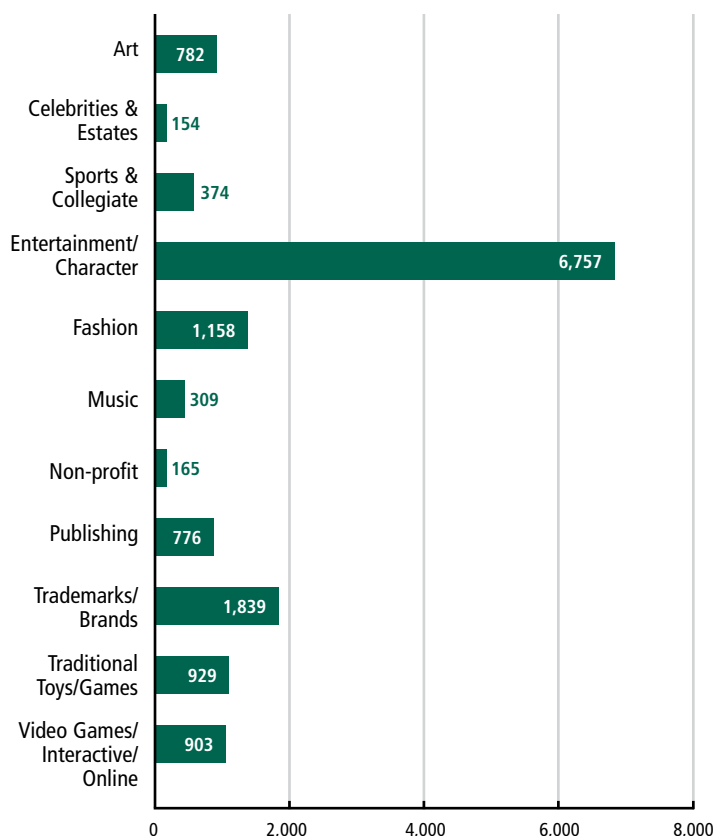
Despite the fact that there are relatively fewer music brand-based companies, those that exist are powerhouses. They represent, on average, 11 properties for consumer products licensing. This figure doesn't accurately represent the number of artists per company however—a large-scale music publisher will have thousands of artists on its roster. Listings in the *Sourcebook* are limited to a licensor's most popular musical acts or, more broadly, the record labels under which they perform.

In the same way, entertainment/character brand-based licensors own approximately 10.3 properties per company. Given that 20% of entertainment/character licensors own just one brand (and 40% of companies five or less) in the U.S./Canada, the high average is a function of a handful of companies with monster rosters.

In an imperfect accounting of the total number of licensable properties, we've counted and segmented the total number of individual properties owned by licensors—or over 14,000 brands.

Entertainment/character properties outnumber the rest by a wide margin with over 6,700 brands owned, followed by trademark/brand (1,800) and fashion (1,200). Note that the total number of brands represented in the

NUMBER OF LICENSABLE PROPERTIES OWNED BY U.S./CANADIAN COMPANIES, BY TYPE



SOURCE: THE LICENSING LETTER SOURCEBOOK, as of January 2018.

Licensing Sourcebook is larger because it includes properties owned by companies outside of the U.S./Canada as well as those whose only representation is through a licensing agent or master licensee. Because of this, the breakdown of brands is not entirely accurate—European fashion, sports, and video game brands, for example, have an impact on licensed sale in the U.S./Canada.

Number of Companies Versus Share of Retail Sales

The licensing business for property types where the share of companies is *greater* than the share by retail sales tends to be more competitive, with a greater number of smaller companies duking it out for consumer attention. Although there are more players, these property types are actually *easier* to compete in because retailers are accustomed to juggling a variety of properties on shelves.

On the other hand, in categories where the share of companies is less than the share by retail sales, the field tends to be dominated by a number of A-list players. Unique, strong brands can certainly disrupt the space—but at a greater cost.

And, obviously, these generalizations are best taken with a grain of salt. The influence of property type

Continued on page 4

depends on the product category and territory in which one is licensing any given brand—as well as the strength of that brand.

Sports, Celebs & Music Companies See Most Sales

On average, companies which own sports and/or collegiate brands generate the most retail sales, as compared to those which license out other property types. This makes sense given that there are fewer companies that

own sports league IP than, say, children’s TV shows. Note that because we’re only counting U.S./Canadian companies, many football clubs which also generate North American sales are not being counted.

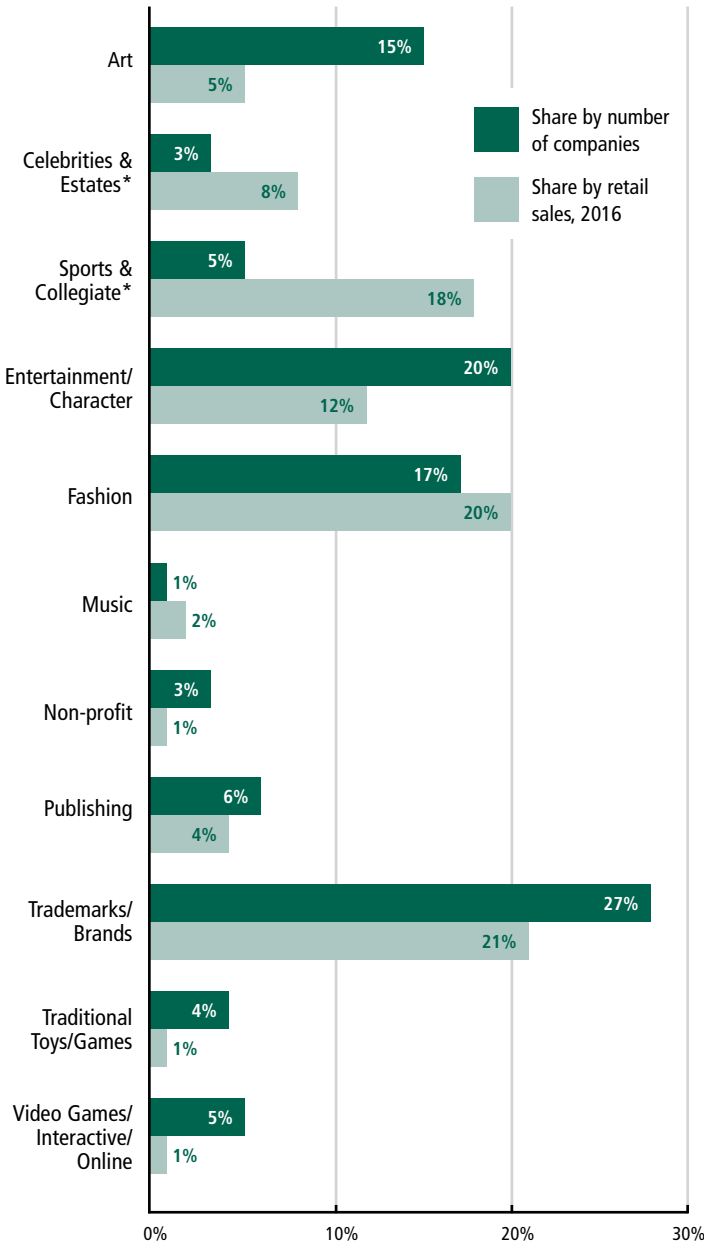
Celebrities & estates ranks second (each company generating an average of \$165 million) and music third (\$105 million). Not all of the money is coming in as profits, however—companies for the top three property types tend to make deals with multiple partners that command lower royalty rates. They also have some of the lowest rates of licensing agents and therefore take on greater expenses for staff and labor.

While the average retail sales figures themselves should be taken with a truckload of salt, the ranking closely tracks relative sales across different types of companies.

Most Valuable Brands: Celebrity & Sports Top-Earners

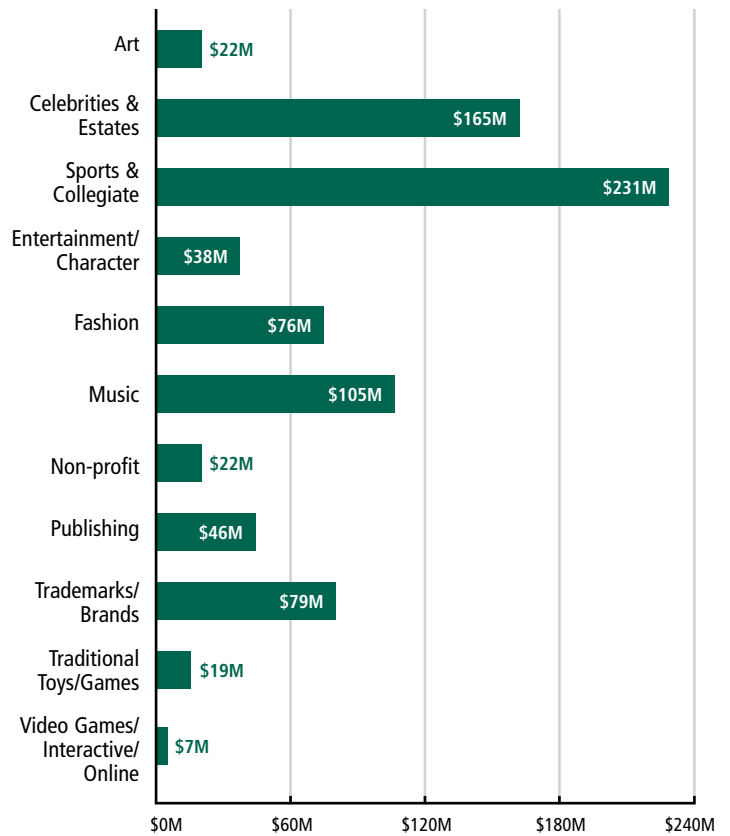
On average, a licensed property will generate \$7.53 million in retail sales a year within the U.S./Canada. The most valuable brands—as determined by calculating the total number of properties owned by licensors in the *Licensing*

**U.S./CANADA LICENSING BUSINESS, BY PROPERTY TYPE
SHARE OF COMPANIES VERSUS SHARE
OF LICENSED RETAIL SALES, 2016**



Note: *Retail sales categories have been combined.
SOURCES: THE LICENSING LETTER SOURCEBOOK, THE LICENSING LETTER

**AVERAGE RETAIL SALES OF LICENSED MERCHANDISE,
BY COMPANY, BASED ON PROPERTY TYPE OWNED,
U.S. & CANADA, 2016 (FIGURES IN MILLIONS)**



Note: *Retail sales categories have been combined.
SOURCES: THE LICENSING LETTER SOURCEBOOK, THE LICENSING LETTER

Sourcebook relative to licensed retail sales in the U.S./Canada for 2016—are actually those categorized as celebrities/estates and sports leagues/colleges. Note that these categories have been combined in the retail sales calculations in order to allow for direct comparison between the Survey and Sourcebook.

And because we have counted only properties that are listed by licensors, it is more likely than not that the properties listed are relatively successful. For example, the average for “sports leagues/colleges” should be lower because the hundreds of institutions represented by agents are not counted. Even when the number of properties is inflated, however, the property type nevertheless ranks in at No. 2 on the list.

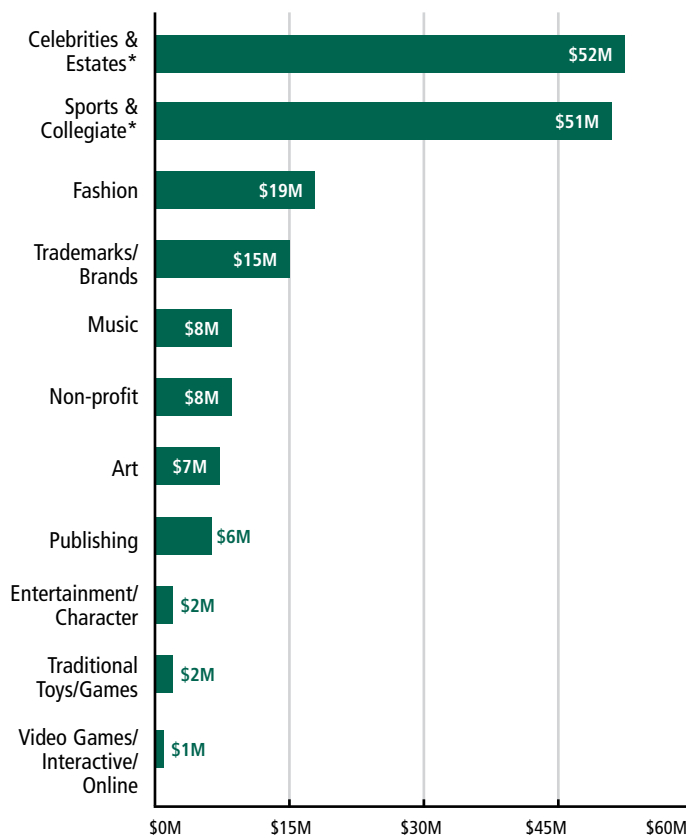
These figures should be read as the average retail sales generated by the most successful licensed properties in each type—with the exception of entertainment/character.

While A-list entertainment/character properties are some of the top-earning brands, on average (given the wide range of properties available for licensing) this type of property will drum up just \$1.89 million worth of sales in a year. That is simply a function of the sheer number of entertainment/character properties, however—we count over 6,000 active, licensable properties from U.S./Canadian companies alone. Last year, 44 entertainment/character brands generated over \$100 million in licensed retail sales each.

In part because there are fewer celebrity, estate, sports, and collegiate brands competing with one another in the same space, these select properties are the highest-earners on average.

On the other hand, licensing based on traditional toys/games as well as video games/interactive/online will see a greater number of properties competing in a smaller space.

AVERAGE RETAIL SALES GENERATED BY A LICENSED PROPERTY, BY TYPE, U.S./CANADA, 2016 (FIGURES IN MILLIONS)



Note: *Retail sales categories have been combined.
 SOURCES: THE LICENSING LETTER SOURCEBOOK, THE LICENSING LETTER

The Licensing Sourcebook Online

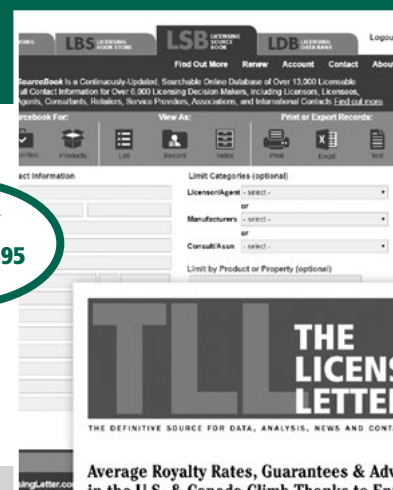
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Licensing News

Properties Available Or Recently Assigned, U.S.

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Deer Little Forest	Art and lifestyle brand created by illustrator Jo Rose; features a one-of-a-kind collection of beautiful animal characters and nature-inspired designs.	All	Jonathan Symington, Lantic Group (The)
Electric Negro (The)	Animated series excites and inspires the superhero in us all. Includes: lifestyle, animation, and live-action.	All	Caryl Liebmann, Liebmann Licensing, Inc.
PapaJoe	Inspired brands by real-life 250 lb. weight loss story that transformed an 'average joe' into a superhero.		
Stacy Garcia	Luxury brand designer known as one of the top names in the hospitality industry; designs can be found at many 3 to 5 star hotels.	All	Beth Hooker, Jewel Branding & Licensing

Licenses Recently Granted, U.S.

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Beverly Hills 90210	Sola Look	Makeup	CBS Consumer Products
Broad City	Wildfox	Apparel	Brandgenuity
Calvin Klein	Nourison Industries	Rugs	Calvin Klein
Dig Dug	My Arcade	Table-top arcade machines	Bandai Namco Games America
Epicurious	EDGE Consumer Brands	Cookware, cutlery, home refrigeration products, microwaves, utensils	Condé Nast Licensing
Fruit of the Loom	Goldbug	Accessories (children's), accessories (infants')	Fruit of the Loom/Union Underwear
Galaga	My Arcade	Table-top arcade machines	Bandai Namco Games America
IAMElemental	Jim Henson Co.	Animation	IAmElemental
Major League Rugby	XBlades Pty. Ltd.	Sportswear, uniforms	Major League Rugby
Miles Davis	Doubleday & Cartwright Only NY Inc.	Apparel Apparel	Sony Music Entertainment
Minnie Mouse	Torrid	Plus size apparel	Disney Consumer Products
NFL	Timex Group	Watches	NFL
Pac-Man	My Arcade	Table-top arcade machines	Bandai Namco Games America
Poldark	Rizzoli Intl. Publications*	Calendars	Knockout Licensing – A CopCorp Partnership
Sailor Moon	BoxLunch Torrid	Accessories, apparel Plus size apparel	Toei Animation
Saved by the Bell	Sola Look	Makeup	Universal Brand Development
Umbro	Target	Jerseys, soccer accessories, soccer apparel, soccer footwear	Iconix Brand Group
Vogue	T. Anthony Ltd.	Luggage, travel goods	Condé Nast Licensing
WWE	Gallery 1988 (G1988)/Nineteen Eighty Eight LLC PLB Sports Skyler Innovations/Watch Ya' Mouth Sunstaches/H2W	Artwork Fruit snacks Board games Novelty sunglasses	World Wrestling Entertainment (WWE)

*Extension or renewal.

Continued on page 7

Licensing News *Continued from page 6*

International Properties Available or Recently Assigned

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
BENRUS	American watch and military-inspired lifestyle brand founded by three brothers in 1912.	Cold weather accessories, jewelry, luggage, small accessories (men's, women's), writing instructions (Worldwide)	Alexis Suarez, Lyft Brands Group/BENRUS
Captain Tsubasa	Anime and manga series debuted in 1981; follows a young soccer prodigy through his friendships and rivalries.	All (North America, LATAM)	Brad Woods, Viz Media
Cartoonist Group	Award-winning group of cartoonists and their work includes: Frank and Ernest, Speed Bump, Ann Telnaes, Joel Pett, Matt Wuerker and Signe Wilkinson.	Accessories, apparel, gifts & collectibles, home decor, stationery (U.K., France, Germany)	Bettina Koeckler, DealFactory (The)
Chic & Love	Fashion and accessories brand combines street style with an avante-garde look. Features Swarovski crystals in many collections.	All (U.K.)	Chris Taday, Licensing Link Ltd.
Christine Graf	Abstract artist uses bright colors, charming themes, and beautiful detail to create sophisticated designs as well as playful, young images.	All (Worldwide)	Jodi Beckett, Shamrock Licensing
EmojiOne	Authentic digital emoji brand with thousands of digital icons and stickers and 10 new collections.	All (Worldwide)	Steven Heller, Brand Liaison (The)
Feisty Pets	Plush toy from William Mark Corp. that goes from cute to feisty with just a squeeze.	All (Worldwide)	Elan Freedman, Surge Licensing
Fur Babies World	U.K. toy and series (Bush Baby World) rebranded for U.S. market. Follows characters who protect the Dream Tree, keeping their magical world in balance.	All (U.S., Canada)	Jay Asher, Brandgenuity
Fur Fuzzles	Plush toys and fashion accessories; plush shaped animal heads with 8 animals in the initial collection.	All (Worldwide)	Tara Rubino, Douglas Company
Good Witch	Comedy-drama series follows the enchantress Cassie Nightingale as she raises her teenage daughter and helps local residents using her magic.	All (Worldwide)	Christina Lima, ITV Studios Global Entertainment - Kids Division
Gruffalo (The)	Children's book tells the story of a mouse taking a walk in a European forest; by writer and playwright Julia Donaldson, illustrated by Axel Scheffler.	All (U.K.)	Rosalyn Carmoody, Brand & Deliver (B&D)
Highway Rat (The)	A greedy, ruthless rat bandit travels the highway in search of other animals' food.	All (U.K.)	
House of Turnowsky	Luxury greeting card, stationery and lifestyle design brand.	All (U.K.) All (North America)	Jane Evans, JELC Ltd. Michael Dresner, Brand Squared Licensing div. Peppercomm
Joanna Cassidy	American actress known for her intoxicating laugh and roles including: Zhora (Bladerunner), Dolores (Who Framed Roger Rabbit), Margaret Chenowith (Six Feet Under).	All (U.S., Canada)	Alita Friedman, Alita's Brand Bar
Last Unicorn (The)	Cult animated musical 1980s film; a young unicorn and a Sorcerer embark on a mission to save unicorns from extinction.	All (Worldwide)	Anna Viola, ITV Studios Global Entertainment - Kids Division
Lufthansa	Largest German airline; ranked No. 1 airline in Europe.	All (U.S., Canada)	Alita Friedman, Alita's Brand Bar
Magic Roundabout (The)	Children's animated series based on the 1963 French stop motion animation show by Serge Danot. Follows a young girl who travels to a magic garden to visit her friends.	All (U.K.)	Russell Neale Dever, Those Licensing People (TLP)
Magnolia Bakery	New York-based bakery franchise serves more than 150 fresh, handmade cakes, cupcakes, cookies, bars and icebox desserts, cheesecakes, and seasonal pies.	All (Worldwide)	Arlene Scanlan, Moxie & Co.
MasterChef	American competitive cooking reality show based on the original British series of the same name, open to amateur and home chefs.	All (China)	Andrew Lee, Brands United Ltd.
Peter Mars	American pop artist whose artwork disrupts predictable interpretation and transforms ordinary daily things into new experiences.	All (North America)	Lisa Marks, Lisa Marks Associates (LMA)
Ponysitters Club (The)	New series based on the book by Victoria Carson follows 12 year old Skye who loves everything about living on a rescue ranch, especially hanging out at the horse stable.	All (Worldwide)	Beth Stevenson, Brain Power Studio
Room on the Broom	A kind witch's cat becomes jealous when she invites a dog, a bird, and a frog for a ride on her broom.	All (U.K.)	Rosalyn Carmoody, Brand & Deliver (B&D)
Royal Armouries	World class collection of arms and armour at its three sites in Leeds, Fort Nelson and the Tower of London. One of the oldest visitor attractions with displays from the 16th century.	All (Worldwide)	Andrew Maconie, Licensing Management Intl.
Sophia Loren Home	New classic lifestyle brand for furniture, home décor, and accessories inspired by the timeless beauty and elegance of Sophia Loren.	All (Worldwide)	Ryan Kernan, Greenlight div. Branded Entertainment Network (BEN)
Stick Man	Children's book and series features Stick Man, who lives in the family tree with his wife and three children, and their epic adventures across the seasons.	All (U.K.)	Rosalyn Carmoody, Brand & Deliver (B&D)
SuperZings	Collectible brand with a Hero vs Villain theme; more than 80 characters and matching rivals that all live in Kaboom City.	All (U.K., Eire)	Francesca Lisle, Lisle Licensing
Tetris	One of the most recognizable and influential video game brands in the world.	All (Italy, Eastern Europe)	Maurizio Distefano, Maurizio Distefano Licensing (MD Licensing)
Turtle Wax	Innovative automotive car care brand for over 70 years.	All (Worldwide)	Jeff Lotman, Global Icons

*Extension or renewal.

Continued on page 8

International Licenses Recently Granted

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Alice Tait	Temple Island Collection	Bags, giftware, notebooks, travel mugs (U.K.)	Metrostar Media Ltd.
	WeLoveCushions	Cushions (U.K.)	
Amusement Park	Funrise Toys	Master toy (Worldwide)	Paramount Pictures
Arty Mouse	EOLO	Books, toys (EMEA)	Animation Intl. Ltd. (Turkey)
Avalanche	Concept One Accessories	Bags, cold weather accessories, headwear, luggage (North America)	Avalanche Licensing/Avalanche Trading Co.
BCBGeneration	Geneva Watch Group	Watches (Worldwide)	Marquee Brands
BCBGMAXAZRIA			
Blaze & the Monster Machines	Wise Toys	Mobile apps, smart toys (Worldwide)	Nickelodeon & Viacom Consumer Products (NVCP)
Bouffants & Broken Hearts	Cotton On Group	Accessories, apparel, intimates, swimwear (Worldwide)	Jewel Branding & Licensing
Crystal Maze (The)	Hut.com Ltd. (The)	Coasters, cushions, mugs, notebooks, pillows (U.K.)	Bulldog Licensing
	Imagine8 U.K. Ltd.	Free standing display units (U.K.)	
Dora and Friends	Wise Toys	Activity books, coloring books (Worldwide)	Nickelodeon & Viacom Consumer Products (NVCP)
Dora the Explorer	Wise Toys	Activity books, coloring books (Worldwide)	
emoji	'47 Brand	Co-branded apparel, co-branded headwear (Worldwide)	Global Merchandising Services
	Cotton Division/Cotton On	Accessories, apparel (Worldwide)	
	Leng Universal/Leng Denim	Denim apparel (Worldwide)	
Fantastic Beasts & Where to Find Them	China Industries Ltd. t/a WOW! Stuff	Gifts, toys (EMEA)	Warner Bros. Consumer Products (EMEA)
Felix the Cat	Alessandro Enriquez	Apparel (Worldwide)	CPLG Southern Europe (Copyright Promotions Licensing Group)
FIFA World Cup 2018	Kayford Holdings *	Sports products (Worldwide (excl. Russia))	FIFA
Game of Thrones	Royal Mail (The)/Royal Mail Group	Stamps (U.K.)	HBO
Gatorade	Nike	Footwear (North America)	PepsiCo
Guess	Marcolin*	Eyewear (Worldwide)	Guess?
Harry Potter	China Industries Ltd. t/a WOW! Stuff	Gifts, toys (EMEA)	Warner Bros. Consumer Products (EMEA)
Hershey's	Animal Adventure	Plush (North America)	CAA-GBG Global Brand Management Group
	FloraCraft	Craft accessories, foam shapes (North America)	
	Jacmel Jewelry	Jewelry (North America)	
Hershey's Kisses	Jacmel Jewelry	Jewelry (North America)	
Imperial War Museum	Bradford Exchange	Gifts & collectibles (U.S., Canada, U.K., Eire)	Spotlight Licensing & Brand Management
In the Night Garden	Trends U.K. Ltd.	Interactive play mats (U.K.)	CPLG U.K. (Copyright Promotions Licensing Group)
Jimmy the Bull	Turner Licensing div. The LANG Companies	Calendars, gift products, stationery (U.S., Canada)	Brand Liaison (The)
Joe Wicks: The Body Coach	Meyer Group Ltd.	Cookware, kitchen products (U.K.)	Global Merchandising Services
Karl Lagerfeld	Giada SpA	Denim apparel (EMEA)	Karl Lagerfeld
Kathy Ireland	Isodiol Intl. Inc.	Cannabidiol products, health & beauty aids (North America)	Level Brands
L.O.L. Surprise!	Parragon Books Ltd.	Books (Europe)	MGA Entertainment
Lilo & Stitch	Funko	Pop vinyl figures (North America)	Disney Consumer Products
Little Miss	Keds div. Wolverine Worldwide	Footwear (Worldwide)	Sanrio GmbH
Looney Tunes	Bobby Abley	Apparel (Europe)	Warner Bros. Consumer Products
Mack Trucks	LEGO Systems	Construction block sets (Worldwide)	Mack Trucks div. Volvo Group
Miraculous: Tales of Ladybug & Cat Noir	Funko	Pop vinyl figures (Worldwide)	Zag America
	Guess?	Apparel (children's) (Europe)	
	Pez Candy	Candy dispensers (Worldwide)	
Mod Mom	Little Colorado	Wooden storage boxes (North America)	Mod Mom Furniture
Moomins (The)	TruffleShuffle.com	Apparel, gifts (U.K.)	Caroline Mickler
Mountain Dew	VFiles*	Apparel (North America)	Joester Loria Group (JLG)
Mr. Men & Little Miss	Samsonite	Travel bags (Worldwide)	Sanrio
Nella the Princess Knight	Wise Toys	Activity books, coloring books (Worldwide)	Nickelodeon & Viacom Consumer Products (NVCP)

*Extension or renewal.

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Licensing News *Continued from page 8*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Oddbods	SilkAir/Singapore Airlines Ltd.	In-flight travel packs (Southeast Asia)	One Animation
Of Dragons, Fairies and Wizards	Re:creation	Toys (U.K.)	Cepia
Oggy & the Cockroaches	Nazara Technologies	Mobile games (Asia-Pacific, Latin America, Middle East.)	Dream Theatre Pvt. Ltd.
Original Penguin	Cia. Mexicana de Trajes	Tailored apparel (Mexico)	Perry Ellis Intl./PEI Licensing
	Mariscal Moda Hombre S.A. de C.V./Grupo Bamex, S.A. de C.V.	Dress shirts, tuxedo shirts (Mexico)	
Paw Patrol	Wise Toys	Mobile apps, smart toys (Worldwide)	Nickelodeon & Viacom Consumer Products (NVCP)
Peppa Pig	Amscan*	Party goods (U.S., Canada)	Entertainment One (eOne)
	CSS Industries, Inc./Paper Magic Group/ C.R. Gibson/Berwick Offray/McCall's Pattern Co./Simplicity Creative Group	Seasonal accessories (Valentine's & Easter), seasonal products (children's, Valentine's & Easter) (U.S., Canada)	
	Kurt S. Adler*	Christmas decorations, Christmas ornaments (U.S., Canada)	
	Palamon Intl. div. Li Fung*	Costumes (U.S., Canada)	
Peter Rabbit (film)	PTI Group	Treat buckets (U.S., Canada)	Penguin Ventures/Penguin Random House
	Aykroyd & Sons Ltd.	Nightwear, swimwear, underwear (U.K.)	
	Danilo Promotions Ltd.	Calendars, greeting cards (Worldwide)	
	Galaxy Optical Services Ltd.	Eyewear (U.K.)	
	Infinity Brands t/a Keep Calm And Carry On Beverage Company Ltd.	Biscuits, sweets (U.S., Canada, U.K., ANZ, South Africa, Asia)	
	Joules Ltd.	Apparel (U.K.)	
	Jumbo Games	Puzzles (U.K.)	
	Rainbow Designs	Plush, toys (U.K.)	
	Somerbond	Nightwear (adult's) (U.K.)	
	Spearmark Intl. Ltd.	Lunchware (Europe)	
PEZ Candy	TDP Textiles	Nightwear, swimwear, underwear (U.K.)	Lisa Marks Associates (LMA)
	TVM Fashion Lab div. Global Brands	Daywear, outerwear (U.K.)	
PlayStation	Calip Dairies, Inc. dba Dolly Madison Ice Cream	Frozen novelties (U.S., Canada)	Sony Computer Entertainment America
	Funko	Co-branded collectibles (U.S., Canada)	
PlayStation	Nike	Sneakers (Worldwide)	Sony Computer Entertainment America
RAF Spitfire	High Resolution Design Ltd. (HRD)	Key rings, plush (U.K.)	Royal Air Force Museum (The, RAF)
Roald Dahl	Fiesta Crafts Ltd.	Finger puppets (Europe)	Roald Dahl Literary Estate (The)
	Paul Lamond Games	Jigsaw puzzles (Europe)	
	Rainbow Designs	Plush (Europe)	
	Winning Moves U.K. Ltd.	Board games (Europe)	
Science4you	Vivid Imaginations/Vivid Toy Group	STEM toys (U.K., Ireland)	Science4you
Sesame Street	Land of Nod	Apparel, backpacks, bedding, decor, furniture (children's), toys (North America)	Sesame Workshop
	Pillow Pets div. CJ Products	Plush pillows (U.S., Canada)	
Shimmer & Shine	Wise Toys	Mobile apps, smart toys (Worldwide)	Nickelodeon & Viacom Consumer Products (NVCP)
Southern Tide	Harry Bacharch	Neckwear (North America)	Southern Tide
SpongeBob SquarePants	Wise Toys	Activity books, coloring books (Worldwide)	Nickelodeon & Viacom Consumer Products (NVCP)
Stella McCartney	ISA Setta SpA	Swimwear (men's) (Worldwide)	Stella McCartney
Teenage Mutant Ninja Turtles	Wise Toys	Coloring & activity books, mobile apps, smart toys (Worldwide)	Nickelodeon & Viacom Consumer Products (NVCP)
Teletubbies	Dongguan Taimei Toys Co., Ltd.	Toys (China)	Promotional Partners Worldwide (PPW)
	Shenzhen Scholar Technology Culture Development Co., Ltd.	Books (China)	
Totaku	ThinkGeek	Figurines (Worldwide)	Sony Computer Entertainment America
UEFA Champions League	Topps Europe Ltd.	Trading cards (Europe)	UEFA Champions League
UFC	Monster Energy*	Promotional products (Worldwide)	Ultimate Fighting Championship (UFC)
We're Going on a Bear Hunt	Visit Isle of Wight Ltd.	Themed events (U.K.)	Walker Books U.K.

*Extension or renewal.

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contacts & connections

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

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Animal Adventure, Michael Kohn, SVP Business Development, 212-695-6418, mkohn@animaladventure.com, P. 8.

Avalanche Licensing/Avalanche Trading Co., Ronald Petrucci, EVP Sales, 978-594-4155, ron@avalanchewear.com, P. 8.

Bandai Namco Games America, Karim Farghaly, Director Marketing, 408-235-2000, kfarghaly@namcobandai.com, P. 6.

BoxLunch, Cindy Levitt, VP General Merchandise Manager, 626-839-4681 x2216, clevitt@hottopic.com, P. 6.

Bradford Exchange, Maura Kelly, VP Licensing & Art Acquisition, 847-581-8200, maura.kelly@bgeltd.com, P. 8.

Brand Liaison (The), Steven Heller, Founder, 855-843-5424, steven@thebrandliaison.com, P. 7, 8.

Brand Squared Licensing div. Peppercomm, Michael Dresner, Partner, 212-931-6100, mdresner@bsquaredlicensing.com, P. 7.

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Brandgenuity, Rachel Humiston, Senior Brand Director, 212-925-0730, rhumiston@brandgenuity.com, P. 6.

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Cepia, Randi Miller, Director Licensing & Marketing, 314-448-0852, rmiller@cepiallc.com, P. 9.

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Condé Nast Licensing, Kimberly Kolozian Bernstein, Associate Director Brand Management, 212-286-2749, kimberly_bernstein@condenast.com, P. 6.

CSS Industries, Inc./Paper Magic Group/C.R. Gibson/Berwick Offray/McCall's Pattern Co./Simplicity Creative Group, Lori White, VP Licensing & IP, 610-729-3755, lori.white@cssindustries.com, P. 9.

Disney Consumer Products, Josh Silverman, EVP Global Licensing, 818-544-0567, josh.silverman@disney.com, P. 6, 8.

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Douglas Company, Tara Rubino, National Sales Manager, 603-352-3414 x1029, trubino@douglastoys.com, P. 7.

EDGE Consumer Brands, Corey Apirian, President, 631-803-3275, info@edgecb.com, P. 6.

Entertainment One (eOne), Joan Grasso, SVP Licensing North America, 212-353-8800 x5219, jgrasso@entonegroup.com, P. 9.

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Global Icons, Jeff Lotman, CEO, 310-873-3560, jeff.lotman@globalicons.com, P. 7.

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Jewel Branding & Licensing, Beth Hooker, VP Licensing, 404-303-1872, beth@jewelbranding.com, P. 6, 8.

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Joester Loria Group (JLG), James Slifer, SVP Business Development, 212-683-8548, jslifer@tjlg.com, P. 8.

Keds div. Wolverine Worldwide, Tracy Graham, Development Director, 617-824-6000, tracy.graham@wwwinc.com, P. 8.

Knockout Licensing – A CopCorp Partnership, Carole Postal, Co-President, 212-947-5958, cop@knockoutlicensing.com, P. 6.

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contacts & connections *Continued from page 13*

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LEGO Systems, Jill Wilfert, VP Global Licensing & Entertainment, 860-763-6827, jill.wilfert@lego.com, P. 8.

Leng Universal/Leng Denim, Robert Leng, President, 212-398-6800, robert@leng-universal.com, P. 8.

Level Brands, Marty Sumichrast, CEO, 704-445-5800, marty@levelbrands.com, P. 8.

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Little Colorado, Bill Hare, President, 303-964-3212, info@littlecolorado.com, P. 8.

Lyft Brands Group/BENRUS, Alexis Suarez, PR & Marketing Director, 212-217-2076, alexissuarez@lyftbrandsgroup.com, P. 7.

Mack Trucks div. Volvo Group, Andrea Alvarez, Global Brand Manager, 336-291-9001, andrea.alvarez@macktrucks.com, P. 8.

Major League Rugby, Jessica Kunzer, Marketing, 801-647-2510, jkunzer@mtsports.com, P. 6.

Marcolin, Jennifer Wright, SVP Product Development, 908-595-6200, jwright@marcolin.com, P. 8.

Marquee Brands, Cory Baker, COO, 212-203-8135, info@marqueebrands.com, P. 8.

Mod Mom Furniture, Kiersten Hathcock, CEO & Founder, 928-707-1523, info@modmomfurniture.com, P. 8.

Monster Energy, Mitch Covington, VP Sports Marketing, 951-739-6476, mitch.covington@monsterenergy.com, P. 9.

Moxie & Co., Arlene Scanlan, Managing Partner, 203-259-2729 x11, ascanlan@moxieco.com, P. 7.

My Arcade, Crystal Dugan, Head Marketing, 310-222-1045, support@myarcadegaming.com, P. 6.

NFL, Christopher Halpin, Chief Strategy Officer, 212-450-2000, chris.halpin@nfl.com, P. 6.

Nike, Howard White, VP Jordan Brand, 503-671-6453, howard.white@nike.com, P. 8.

Nike, Kelli Vitters, Global Product Licensing, 503-671-6453, kelli.vitters@nike.com, P. 9.

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Only NY Inc., Micah Belamarich, Creative Director, info@onlyny.com, P. 6.

Palamon Intl. div. Li Fung, Cheryl McCarthy, SVP, 818-505-4845, cheryl.mccarthy@palamon.com.hk, P. 9.

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PepsiCo, Leslie Nagy, Director Marketing Services & Licensing, 914-253-2000, leslie.nagy@pepsi.com, P. 8.

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Pez Candy, Christian Jegen, President & CEO, 203-795-0531, cjegen@pezcandyinc.com, P. 8.

Pillow Pets div. CJ Products, Clint Telfer, President, 760-724-7225, clint@mypillowpets.com, P. 9.

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Rizzoli Intl. Publications, Robb Pearlman, Associate Publisher Universe Books, Calendars, & Licensing, 212-387-3400, rpearlman@rizzoliusa.com, P. 6.

Samsonite, Joe Granata, Director Product Marketing Samsonite & American Tourister, 508-851-1400, joe.granata@samsonite.com, P. 8.

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Sony Computer Entertainment America, Philip Rosenberg, SVP Playstation, 650-655-8000, phil_rosenberg@playstation.sony.com, P. 9.

Sony Music Entertainment, Adam Block, President Legacy Recordings, 212-833-7941, adam.block@sonymusic.com, P. 6.

Sony Pictures Consumer Products, Jamie Stevens, EVP Global Consumer Products & Licensing, 310-244-4000, jamie_stevens@spe.sony.com, P. 9.

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Spotlight Licensing & Brand Management, Carole Postal, President, 212-947-5958, carole@spotlightlicensing.com, P. 8.

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international contacts & connections

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

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CPLG Southern Europe (Copyright Promotions Licensing Group), Maria G. Gurrieri, MD Southern Europe, Italy, Greece & Turkey, 39 02 8546 330, maria.gurrieri@cplg.com, P. 8.

CPLG U.K. (Copyright Promotions Licensing Group), Peter Byrne, CEO, 44 20 8563 6107, peter.byrne@cplg.com, P. 8.

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Dongguan Taimei Toys Co., Ltd., Yiyang Chen, Legal Representative, 86 76989302388, P. 9.

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FIFA, Dominique Boyer, Head Retail & Licensing, 41 43 222 7777, dominique.boyer@fifa.org, P. 8.

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Giada SpA, Franco Catania, CEO, 39 02 80501916, info@giada.com, P. 8.

Global Merchandising Services, Jens Drinkwater, Licensing Manager, 44 207 384 6467, jens@globalmerchservices.com, P. 8.

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Hut.com Ltd. (The), Claire West, Licensing & Partnerships Manager, 44 1606 338 197, partnerships@thehut.com, P. 8.

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contacts & connections *Continued from page 15*

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Mariscal Moda Hombre S.A. de C.V./ Grupo Bamex, S.A. de C.V., Ruben Marcos, President, 55 52 81 8130 7804, rmarcos@grupobamex.com, P. 9.

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Penguin Ventures/Penguin Random House, Susan Bolsover, Head Licensing & Consumer Products, 44 20 7010 3083, susan.bolsover@uk.penguinrpgroup.com, P. 9.

Promotional Partners Worldwide (PPW), Ivan Chan, CEO, 852 2505 0299, ivanchan@ppgl.com, P. 9.

Rainbow Designs, Anthony Temple, MD, 44 208 600 2550, sales@rainbowdesigns.co.uk, P. 9.

Re:creation, Jonathan Kirkley, Sales & Marketing Director, 44 118 973 6222, jkirkley@recreationltd.co.uk, P. 9.

Roald Dahl Literary Estate (The), Stephanie Griggs, Licensing & Design Director, 44 20 3696 6450, stephanie@roalddahl.com, P. 9.

Royal Air Force Museum (The, RAF), Derek O'Brien, Licensing Executive, 44 20 8205 2266, derek.o'brien@rafmuseum.org, P. 9.

Royal Mail (The)/Royal Mail Group, Matthew Parkes, MD Royal Mail Stamps & Collectibles, 44 1782 668 007, matthew.parkes@royalmail.com, P. 8.

Sanrio Global Ltd., Alastair McHarrie, Head U.K. Licensing, amcharrie@sanriolicense.com, P. 8.

Science4you, Manuel Laia, Intl. Sales & Intl. Business, 351 211 316 796, info@science4you.pt, P. 9.

Shenzhen Scholar Technology Culture Development Co., Ltd., Chengfu Gu, Legal Representative, 86 75582446421, P. 9.

SilkAir/Singapore Airlines Ltd., Mohamed Rafi Mar, VP Commercial, 65 6540-6497, silkair_pa@singaporeair.com.sg, P. 9.

Somerbond, Mark Tomlin, Director Licensing, 44 208 838 2100, mark.tomlin@somerbond.co.uk, P. 9.

Spearmark Intl. Ltd., Alex Bloom, MD, 44 1480 213 633, alexb@spearmark.co.uk, P. 9.

Stella McCartney, Laurène de Mortemart, License Director, 44 20 7518 3100, laurene@stellamccartney.com, P. 9.

TDP Textiles, Dean Greasley, Director Licensing, 44 1283 550400, dean@tdptex.com, P. 9.

Temple Island Collection, Samantha Underwood, Sales Executive, 44 1494 474037, sales@templeisland.com, P. 8.

Those Licensing People (TLP), Russell Neale Dever, MD, 44 845 901 1657, russell@thoselicensingpeople.com, P. 7.

Topps Europe Ltd., Rod Pearson, Marketing Director, 44 1908 800 100, rod.pearson@topps.co.uk, P. 9.

Trends U.K. Ltd., Lindsay Hardy, Marketing Director, 44 1295 768 078, info@trendasuk.co.uk, P. 8.

TruffleShuffle.com, Pat Wood, MD, 44 117 982 8884, pat@trufflesuffle.co.uk, P. 8.

TVM Fashion Lab div. Global Brands, Andrew Webster, MD, 44 207 563 8526, andrew@fashion-lab.co.uk, P. 9.

UEFA Champions League, Guy-Laurent Epstein, Head Media Rights, 41 848 00 2727, info@uefa.com, P. 9.

Visit Isle of Wight Ltd., Simon Dabell, Chairman & CEO, 44 01983 521555, info@visitwight.org, P. 9.

Vivid Imaginations/Vivid Toy Group, Emma Weber, Intl. Licensing Director, 44 1702 200 660, emma.weber@vividimag.co.uk, P. 9.

Walker Books U.K., Julia Posen, EVP & Commercial Director Group Rights/Development, 44 20 7793 0909, julia.posen@walker.co.uk, P. 9.

Warner Bros. Consumer Products (EMEA), Paul Bufton, VP Licensing & Business Development, 44 20 7984 6000, paul.bufton@warnerbros.com, P. 8.

WeLoveCushions, Mark Turner, Owner, 44 208 801 5491, info@welovecushions.co.uk, P. 8.

Winning Moves U.K. Ltd., Charlotte Waalkens, Marketing & Licensing Manager, 44 20 7262 9696, charlotte.waalkens@winningmoves.co.uk, P. 9.

Wise Toys, Yuval Gloz, CEO, support@wise-toys.com, P. 8,9.

XBlades Pty. Ltd., Jonathan Lindsay, GM, Marketing & Export, 61 3 9544 0199, jonathan@xblades.com.au, P. 6.

Sports: A Closer Look

Continued from page 1

Just over half of U.S. adults plan to watch the big game this year, according to Fluent, a data-driven marketing firm. But there are some who are opting out; of the respondents who said they won't watch the game but did last year, a quarter said it's because football has gotten too political. Another 20% said they won't watch the Super Bowl because of President Trump's past comments regarding the NFL.

Of those who will be watching the game, here are a couple of notable brand activations:

The NFL partners with Rovio to release a Super Bowl-themed take of Angry Birds. Games involved include both Angry Birds 2 and Angry Birds Evolution with the jersey and kits of 32 NFL teams available in-game. Meanwhile, a new bird type titled 'Quarterback' is being added to the siege game.

At least one of the highly-anticipated Super Bowl ads will be superpowerer—Lexus will air a 30-second spot during the third quarter and release a 60-second extended digital version of its ad—created in partnership with Marvel Studios' *Black Panther*. The spot is titled "Long Live the King" and pairs the luxury sedan 2018 Lexus LS 500 F SPORT with the Black Panther, played by Chadwick Boseman.

Winter Olympics

If the Super Bowl has gotten too political for some, where does that leave the Olympic Games? Since many events in Pyeongchang are timed to take place during prime-time American TV slots, it will be interesting to see how kindly the Olympic Committee will adapt to American viewers' demands in the future if viewership and spending go down—and there is increased focus on Asia. Tokyo will host the next 2020 Summer Olympics, while Beijing will be home to the 2022 Winter Olympics.

The Olympic years are said to provide an overall "feel good" boost to consumer spending—indeed, over the years many respondents to *TLL's Licensing Survey* commented that they expected to see, and later actually saw, an increase in retail sales related to the Olympic

phenomenon for retail sales. While our data supports this theory for the years when the Summer and Winter Games were held in the same year (1992 and every 4 years prior), more recently, the rate of growth in licensed retail sales has not fluctuated visibly in the years of the games.

But that's not to mean that there is no economic impact—and this year, the winning trends might come from some strange places.

As you may know, the NHL has refused to interrupt its regular season games and send its player to the U.S. Olympic Team to compete. It's an odd move that the NHLPA and individual players have called the League out on. On one hand, the move hardly matters in terms of American glory—the true gold-medal favorite for hockey is, in fact, the celebrated women's team, which has been practicing for the Games all year. The women's roster features a mix of professional NWHL, WCHA, and HEA league players as well as the Minnesota Whitecaps (who aren't currently part of a league).

The U.S. Olympic Committee culled its men's hockey team from relatively unknown collegiate and European professional leagues. Fifteen men have NHL experience and four come from the NCAA roster. Which invites the question—will it be possible for the historic "Miracle on Ice" for the 1980 Olympics to be re-created? Then, a ragtag team of amateur American hockey players beat the Soviet Union and Sweden to win the gold medal in Lake Placid, NY. (For the last time.) Not quite.

In part because of sanctions placed on the Russian Olympic Committee (five players submitted by Russian Hockey officials won't be able to compete), the "Olympic Athletes from Russia" team will be led by some of the NHL's most dominant players at the Pyeongchang Games. (And some of the top American players are coming home from playing in the Russian league.)

Several other Russian medal contenders are also out, including short-track speed skater Viktor Ahn (who gained citizenship in time for the 2014 Olympics to win all of the gold medals; he formerly competed for South Korea and was expected to retire after Pyeongchang). Other notable quirks of the ban; in figure skating, one athlete each in the

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pairs and dance disciplines were not allowed to compete, effectively striking four athletes out of competition for the price of two.

Other strange sights during the Olympics include a unified Korean team—12 women's hockey players will train and at least three will compete during games in the South. Also expected to compete under the Korean re-unification flag are 10 other athletes in figure skating (pairs), short track speed skating, Alpine skiing, and cross-country skiing.

It will be interesting to see the ragtag men's hockey team can help boost interest in its athletes' leagues—and if women's hockey can finally become a thing that people watch. At any rate, the NHL won't lose out—a search for officially licensed goods for either team will ultimately land you at the Fanatics webpage for NHL merch.

Niche, But Growing

As for those who aren't tuning into the most traditional of American sports? Leger released its latest study on the viewing habits of adults and esports, noting that—as of December 2017—one out of five U.S. adults reported watching an esports event, with YouTube the leading way for them to do so. Meanwhile, between June and December 2017, awareness of esports jumped from 36–50% among U.S. adults.

In keeping with the times, LPGA Women's Network launched at the 2018 PGA Merchandise Show. The network aims to be the biggest forum for female golfers of all skill levels and backgrounds; it features articles and op-ed pieces from key names and thought-leaders in the world of golf for women.

RETAIL SALES

U.S. Holiday Retail Sales Outpace Expectations

More than in any other season, the share of licensed retail sales during the end-of-year holiday shopping period is the highest of the year. Look out for *TLL's Annual Licensing Business Survey* to hit your inboxes to share your perspective on how well (or not) 2017 went—but in the meantime, we look back on the general retail market.

Considering that current estimates peg holiday growth at up at least 5% compared to the previous year, the outlook for licensed retail sales appears particularly rosy.

According to the National Retail Federation, retail sales during the Nov. 1—Dec. 31 holiday period were up 5.5% in 2017 to reach \$691.9 billion. This is the most growth observed since 2010 and beats the organization's forecast of \$678–682 billion in sales, which would have been a 3.6–4% increase. The total holiday sales figures—which excludes restaurants, automobile dealers, and gasoline stations—includes \$138.4 billion in online and other non-store sales, which were up 11.5% over the prior year. The NRF recorded increases in all categories save sporting goods, which was down 0.5% in 2017.

The U.S. Census Bureau estimates that overall December sales—including automobiles, gasoline, and restaurants—were up 0.4% seasonally adjusted from November and 5.4% from last year. Retail trade sales were up 0.3% from November and 5.6% from December last year. Advance estimates place total December retail sales at \$495.5 billion and revised November figures at \$493.6 billion—totaling \$989 billion for the holiday season.

The U.S. Commerce Department's first estimate for Q4 GDP, pegged its increase at an annualized rate of 2.6%—and that of consumer spending at 3.8%, or fastest growth rate in over a year.

A successful holiday season, however, means that retailers are also having trouble restocking shelves. A report from the *Wall Street Journal* suggests that businesses are facing

increasing costs to truck their goods across the country, with expenses expected to remain high over the next couple of years, thanks to a national shortage of drivers and vehicles.

Now more than ever, retailers and manufacturers will need to be able to more efficiently and quickly track their inventory as well as consumer demand. This is especially true considering that it will become more and more difficult to offload these types of increased costs off to consumers. Demand and spending has been increasing at a faster rate than income growth; consumers are saving less and are spending more for essentials like housing and medical care. While the tax cut should slow down the inevitable, its boost to Americans' paychecks is only temporary.

The biggest retail disruptors are more willing to sacrifice a faster growth trajectory to achieve the customer experience shoppers expect—with better results than non-disruptors, according to the new 2018 Retail Disruptors Survey for JDA Software Inc. by Retail Systems Research. In addition to focusing on products, delivery, and customer experience, the survey found that disruptors have a different attitude toward technology, using it to improve the customer experience: 25% offer seamless shopping experiences across all channels vs. just 13% of non-disruptors. Seventy-one percent believe cross-channel fulfillment will drive foot traffic into stores in addition to interactive technology (62%) and loyalty programs (60%).

A consumer-focused survey from PointSource reveals that shoppers are more engaged when AI or chat bots are deployed tactically on online sites; 49% are willing to shop more frequently, 34% will spend more money, and 38% will share their experiences with friends and family. The boost comes when AI is used for simple interactions like checking if products are in stock, pricing information, or product discounts. When it comes to more complicated, high-stake and in-store retail interactions, however, consumers preferred the human touch.

HEALTH & BEAUTY

HBA Gets Fashionable

Licensed consumer goods based on fashion brands generated \$21.45 billion worth of retail sales in the U.S./Canada in 2016—HBA goods accounted for \$2.55 billion's worth of that.

This year, we can expect to see more competition in the HBA space from home-brewed brands (the types of which would have been obvious picks for licensing in prior years) and new, innovative extensions from existing brands.

L'Oréal and **David Beckham** launch a new men's grooming brand—House 99—due to selectively launch worldwide in March. It's the first time the British soccer star has launched his own beauty label as well as one of the few rare moments L'Oréal has launched a new brand from scratch—the line includes 21 items for beards, shaving, face, body, hair, and even tattoos. The most unique item out of the line? A tattoo body moisturizer with an SPF 30, created by and for Beckham, who has some 40 tattoos, to help preserve their original colors.

WWD reports a projection by industry sources that House 99 will generate retail sales of \$50 million in its first year worldwide. The men's grooming and beauty market, in particular, has been enjoying double-digit growth over the last couple of years.

American watch and lifestyle brand **BENRUS** gets a new home under the ownership of BENRUS Holdings—an affiliate of New England Partners Opportunities Fund, operating in partnership with **Lyft Brands Group**. Lyft Brands will offer signature pieces, an updated look, and new licensed offerings in core categories for the 97 year-old brand.

In other luggage news, Condé Nast enters into a deal with American luxury goods company, **T. Anthony**, for a luggage and travel goods collaboration with Vogue. The

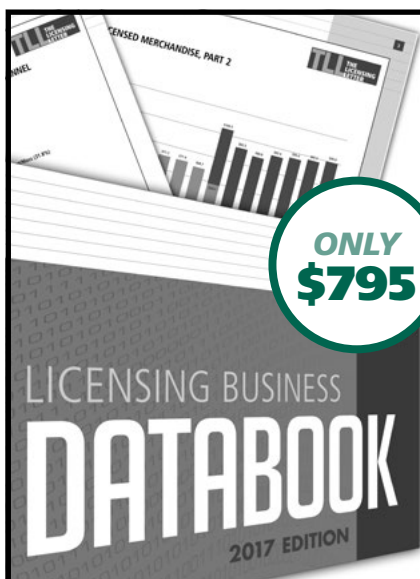
line, simply titled Vogue x T. Anthony, will offer a unique, limited-edition collection of selected T. Anthony signature styles in exclusive colorways.

Greenlight, a division of Branded Entertainment Network, launches **Sophia Loren Home**—a new classic lifestyle brand for furniture, home decor, and accessories including bed, bath, rugs, and lighting. While Sophia has developed several marketing partnerships with partners like Dolce & Gabbana and Damiani, this new property represents her first step into brand licensing for the category.

Level Brands' key lifestyle properties, *kathy ireland* and *I'M1*, are growing with new wellness CBD-based product lines. Vancouver-based **Isodiol Intl.** is expected to develop hemp-derived products such as body balm, tincture, skin-care, nano-mist, and functional beverages.

Per the terms of the five-year agreement, Level Brands will receive an initial \$2 million payment in the form of Isodiol shares and initial cash payments of \$62,500 due at execution of the licensing agreement and in June 2018. During the term of the agreement, Level will also receive \$750,000 per quarter in the form of Isodiol shares and a 3% royalty on all gross sales of branded products.

Designer **Christian Siriano** officially breaks ties with licensee and wholesaler **M&A Imports** in a deal set to expire later this year for ladies' dresses, girls' dresses, intimates, and sleepwear. M&A sued Soriano in November 2017 for over \$10 million—and now the designer is counter-suing on a trademark infringement claim, stating that M&A breached its agreement by producing unapproved or inferior garments. The case is *Christian Siriano Holdings, LLC v. M&A Imports, Ltd.*, 1:18-cv-00055 (SDNY).



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THEME PARKS

Experiential Licensing: Targeting Travelers

Around 62% of companies are using experiential to drive both brand awareness and lead generation, according to **AgencyEA**, a global full-service brand experience agency. When it comes to budget growth, 38% anticipate a 10% or greater increase in their experiential budget within the next 18 months; another 25% expecting a boost of 5–10% in budget growth.

Globally, the fastest-growing consumer segments are spenders hailing from Asia and, more generally, Millennials. These two cohorts are more likely than ever to spend money on an experience, rather than on some consumer good.

According to Expedia's 2018 Air Travel Outlook Report, for example, 74% of 18–65 year-olds would rather spend their money on experiences than possessions, with 65% of 22–35 year-olds setting aside money specifically for travel. According to the U.S. Travel Association, direct spending on leisure travel by domestic and international travelers totaled \$683.1 billion in 2016.

To that end, brands are crafting new experiences around the world for travelers of every type.

Cartoon Network is getting its own cruise liner, Cartoon Network Wave, thanks to a partnership with **Oceanic Group**, Asia-Pacific's leading cruise management company. A themed onboard experience includes characters from shows such as *Adventure Time*, *Ben 10*, *The Powerpuff Girls*, and *We Bare Bears*. The 11 guest-deck, 2,000-guest ship will make its maiden voyage from its home port of Singapore in late 2018—making its way to 13 destinations in the APAC region incl. Singapore, Malaysia, Thailand, China, Taiwan, South Korea, Australia, and Japan.

In the U.K., **Cartoon Network** promotes its new animated series *We Bare Bears* with a polar-bear shaped food truck. The pop-up will hand out free drinks to kids and their families as it tours the country.

Nickelodeon breaks ground on its first theme park in China, Nickelodeon Cultural Resort. The park is part of a larger development project—estimated to be worth \$1.71

billion—and is expected to open in 2020. As many as 6.7 million tourists are anticipated in the first year of operation. Characters to feature at the park include those from *SpongeBob SquarePants*, *Dora the Explorer*, and the *Teenage Mutant Ninja Turtles*.

Late last year, **Nick** also signed with **IMG World's** new theme park to open its first branded park in Dubai.

Disney is also building in China, with the company and the Hong Kong government planning a \$1.4 billion expansion to the existing Hong Kong Disneyland.

Across the pond, **Universal Studios Hollywood** will welcome **DreamWork's** *Kung Fu Panda* for its Chinese Lunar New Year celebrations. New attractions at the California theme park include a Dragon Warrior Training stage show, the opening of a replica Mr. Ping's Noodle Shop, and the return of a Mandarin-speaking *Transformers* MEGATRON.

This year will see the launch of the **DreamWorks** Theater attraction created in partnership with **Universal Creative** and **DreamWorks Artists** at the Hollywood park. The opening attraction will feature a Kung Fu Panda multi-sensory adventure with state-of-the-art projection mapping and LED lighting effects.

The **Culinary Institute of America** and **Time Inc.'s** *Food & Wine* pair up to host a culinary festival series in a deal brokered by **Orchard Street Ventures**, Food & Wine's agent. The inaugural event takes place over three days and kicks off in Cali. on Feb. 16, 2018. An immersive experience, the weekend will include tastings, hands-on cooking lessons, and educational seminars.

Meanwhile, **Disney's** Minnie Mouse is getting a star on the Hollywood Walk of Fame in honor of her 90th anniversary; the star will be dedicated in the category of Motion Pictures in front of El Capitan Theatre. Minnie joins previous honorees such as Donald Duck, Tinker Bell, Winnie the Pooh, Snow White, Kermit the Frog, and, of course, Mickey Mouse. Bob Iger and Katy Perry will emcee the dedication of the 2,627th star.



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ROUNDUP

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The Home Depot purchases textiles and home décor products retailer The Company Store from parent **Hanover Direct**. The deal doesn't include any physical stores.

Spotify confidentially files for an initial public offering. The music streaming service is targeting a direct listing in the first half of 2018. The company has been valued at around \$19 billion.

Maverick Apparel is threatening legal action against YouTuber **Logan Paul**, for, among other things, trademark infringement. The apparel company alleges damages of approximately \$4 million thanks to consumer confusion with *Maverick by Logan Paul* merchandise.

Amazon files a trademark application for the name "AmazonTube"—a provider of "non-downloadable pre-recorded audio, visual and audiovisual works via wireless networks on a variety of topics of general interest."

On the original YouTube however, online video company **Divimove** revealed the top brands with the biggest channels in 2016. The top players are Warner Bros. (with 4.7 million subscribers), PlayStation (6 million), Red Bull (6.6 million), Ford (1.4 million), and Nike (700,000). The brands with the most subscriber growth were Bloomberg (50%), Tencent (247%), and Subway (173%).



TLL Calendar of Events

Get out your date books and confirm your attendance at some of the most important trade show events this year. Please note that *TLL* isn't officially affiliated with any of these events, and that dates are subject to change or cancellation. Some events, especially those that take place at the end of the year, may not be listed because their dates have not been confirmed.

Agenda Las Vegas

Feb. 12–14th
Las Vegas, NV

Kidscreen Summit

Feb. 12–15th
Miami, FL

MAGIC

Feb. 12–14th
Las Vegas, NV

North American Intl. Toy Fair

Feb. 17–20th
New York, NY

NYC Licensing Summit

Feb. 20th
New York, NY

Licensing World Russia

Feb. 27–Mar. 1st
Moscow, Russia

Australian Toy Hobby & Licensing Fair

Mar. 4–7th
Melbourne, Australia

Bologna Children's Book Fair

Mar. 26–29th
Bologna, Italy

Intl. Home + Housewares Show

Mar. 10–13th
Chicago, IL

Kazachok Licensing Forum

Apr. 4–5th
Paris, France

MIPTV

Apr. 9–12th
Cannes, France

Licensing Expo Japan

Apr. 25–27th
Tokyo, Japan

MAGIC Japan

Apr. 25–27th
Tokyo, Japan

BolognaFiere Book Trade & Licensing Show

May 30–Jun. 1st
New York, NY

Brand Licensing Europe

Oct. 9–11th
London, U.K.

China Licensing Expo

Oct. 16–18th
Shanghai, China

Play Fair

Nov. 3–5th
New York, NY



Who's News

Are you hiring—or being promoted, changing jobs, retiring, launching a new company, or otherwise changing your employment? Email Jen at jen@plainlanguagemedia.com and we'll announce the news in our next issue of *Who's News*.

LIMA welcomes **Gisela Abrams** (from Sesame Workshop) as SVP Global Partnerships and **Sharon Weisman** (from UBM) as Senior Director Global Business Development. Both Gisela and Sharon report to EVP Maura Regan.

Mark Kingston is promoted to SVP Nickelodeon & Viacom Consumer Products. Mark will be based in London, reporting to CMO **Pam Kaufman**. In addition to managing EMEA operations for the unit, his remit is expanded to include all regions outside of the US across retail, operations, licensing, and promotions, and marketing.

Marvel Entertainment's **Dan Buckley** stands down as Publisher, a position he's held for the last 15 years, to become the full-time President of the company. Dan is replaced by **John Nee**, formerly DC Entertainment's SVP Business Development.

National Geographic Partners appoints **Helena Mansell-Stopher**, hailing from Bulldog Licensing, as Director Consumer Products U.K. Based in London, Helena will report to **Maria Maranesi**, VP Consumer Products & Experiences for Europe and Africa. Citing "modernization," National Geographic Partners lays off about a dozen staffers—approximately 1% of its total workforce of 900 strong.

Sarah Muller joins Sony Pictures Television Networks in a VP position to helm its growing U.K. children's and youth portfolio. She leads brands POP, Tiny Pop, POP MAX, and AVOD service POP FUN in addition to the company's music channel portfolio.

Online print-on-demand marketplace Redbubble taps **Cynthia Money** to serve as the company's Head Licensing.

The new chairman of National Retail Federation's board of directors is **Christopher Baldwin**, BJ's Wholesale Club President & CEO. He will serve a two-year term and succeeds Macy's Executive Chairman **Terry Lundgren**, who assumed the NRF chairmanship last July. NRF also elected eight other retailers and retail partners as new members of the board:

- ▶ **Miki Racine** Berardelli—CEO, KIDBOX
- ▶ **John Furner**—President & CEO, Sam's Club
- ▶ **Jeff Gennette**—CEO, Macy's
- ▶ **Mike George**—President & CEO, QVC Group
- ▶ **Steve Joyce**—CEO, DineEquity
- ▶ **Rachel Mushahwar**—GM U.S. Enterprise, Government, SLED & Cloud Industries, Intel
- ▶ **Eva Press**—U.S. Group Lead, Consumer Packaged Goods, Government, Healthcare & Retail, Facebook
- ▶ **Brad Weston**—CEO, Petco

After restructuring, Precious Moments has a new licensing team in the shape of **Abbie Honaker** as Director New Business Licensing; **Elisa McDermott** as VP Sales; and **Mary Theis** as Licensing Manager. This year marks the company's 40th anniversary.

Basic Fun!, the toyco formed from the merger of The Bridge Direct and Tech 4 Kids, appoints **Ashley Mady** to serve as Head Brand Development. Ashley formerly ran licensing and creative agency Brandberry; she continues to serve as President of the Women in Toys organization.

Ralph Lauren hires **Alice Delahunt** as Chief Digital Officer and appoints new digital leaders worldwide: **Laura Porco** is SVP E-commerce Ralph Lauren North America, **Galen Hardy** is SVP Club Monaco E-Commerce & Business Operations, and **Valeria Juarezis** is SVP E-commerce Intl.

The licensing arm and national broadcaster of the U.S. Polo Association, USPA Global Licensing, appoints **J. Michael Prince** to serve as CEO and **W. David Cummings** as Chairman of the Board. The team has crafted a new strategic plan which envisions the brand exceeding \$2 billion in global retail sales (it's currently at \$1.5 billion), in part by transitioning USPA into a digital and media content-driven brand.

Warner Bros. appoints **Walter Hamada** as President of its DC-based film production efforts. Hamada is best known for his work on the *Conjuring* horror series as well as the films *It* and *Annabelle: Creation*.

Jared Wolfson returns to Jakks Pacific as SVP Digital Marketing & Studio JP—the toyco's new division dedicated to creating and developing original, multiplatform animated content.

Former Toys 'R' Us China executive **Kirsten Ytterbo** is now the SVP of King Bee Ltd.

Iconix Brand Group's **Peter Cuneo** shifts his role to Executive Chairman of the Board of Directors. Cuneo is now focused on evaluating strategic opportunities, overseeing the financial and legal functions, and working toward stabilizing the company's balance sheet.

Macy's creates the new post of Chief Product & Digital Revenue Officer, to be filled by **Jill Ramsey**. She oversees product and revenue for macys.com and the Macy's app, and will be responsible for heading digital revenue, enterprise product management, the enterprise portfolio, digital merchandise management, site production, and the user experience.

Univision Communications names **Jessica Rodriguez** to the newly created role of President & COO UCI Networks; Jessica will continue to serve in her existing role as CMO of UCI.

Jennifer Rogers Doyle is promoted to the newly created position of SVP Brand Development & Integrated Planning at Disney Channels. Jennifer will add integrated planning and the development of cross-department marketing strategies for Disney Junior, Disney Channel and Disney XD series, movies, and programming events to her remit.

The Walt Disney Co. adds two tech execs to its board of directors: **Safra Catz**, CEO of Oracle, and **Francis A. deSouza**, CEO of biotech firm Illumina.

Elsewhere, the House of Mouse is planning to give \$1,000 bonuses to more than 125,000 non-managerial employees, including part-timers. CEO **Bob Iger** additionally promised to invest \$50 million in a new education program. He didn't mention whether the bonuses were connected with the recently enacted tax overhaul; Comcast and AT&T both cited the federal reform in announcing their recent bonus programs.

Who's News, Cont'd.

Following IMG's acquisition of Exhibition Intl., the company's Founder & President **John Norman**, will become MD Exhibitions for IMG Events. The rest of the Exhibition Intl. team will also join IMG.

Neiman Marcus Group names **Geoffroy van Raemdonck** as its new CEO, succeeding **Karen Katz**. Katz will retire as President & CEO but will remain on the board.

Diesel taps **Marco Agnolin** as its new CEO.

Mitchell Loring retires as President of Meyer Corporation U.S.

Wayfair hires **Molly Sullivan** as Head Creative, a new position where she will oversee brand and marketing creative initiatives globally.

Marketing and communications firm ChizComm promotes **Donna MacNeil** to SVP Marketing and hires **Ian Chisholm**.

Shout! Studios, the entertainment distribution and production arm of Shout! Factory, appoints **Brent Haynes** as Head TV Development.

At MarVista Entertainment, **Darrell Cross** joins as CFO; **Jody Cipriano** as Head Global Distribution; and **Janet Savage** as SVP Business & Legal Affairs. In addition, MarVista promotes **Kenny Christmas** to EVP Business & Legal Affairs and **Rod Rodrigo** to VP Intl. Sales.

Nathan Jenden is back at Diane von Furstenberg as Chief Design Officer & VP Creative; he will oversee all design for the brand.

Jonathan Saunders resigned as Chief Creative Officer last month.

Ollie's Bargain Outlet promotes **John Swygert** to EVP & COO and **Jay Stasz** to SVP & CFO.

Lowe's hires **Vikram Singh** as Chief Digital Officer.

Jamie Mabbs is appointed as Revell's new U.K. Country Manager.

Twitter promotes **Stephanie Prager** from Head of U.S. Agency Development to Head of Global Agency Development, consolidating the two roles.

David Ayer (*Suicide Squad*, *Bright*) and **Chris Long** team up to form Cedar Park Entertainment. The new venture will develop film and TV projects for multiple platforms.

Image Comics welcomes **Sean Edgar** as Brand Manager.

TDP Textiles promotes **Dean Greasley** to Director Licensing and hires **Jo Thomas** as Senior Account Manager Daywear.

Wicked Cool Toys hires **Herb Mitschele** as EVP Global Sales & Operations.

David Lacey is the new CEO of SMASHMALLOW.

Within its North American Marketing and Events team, Octagon promotes **Matt Malichio** to SVP & Creative Director; **Meredith Kinsman** to VP Digital Strategy; and **Lindsay Wynalek** to VP.

The PGA TOUR unveils plans for its new global home, which will consolidate area employees under one roof in Ponte Vedra Beach. The new 187,000 square-foot headquarters is expected to be completed in 2020.

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