

TLL THE LICENSING LETTER

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Licensed Sales Up 2.3% to Reach \$109 Billion in U.S./Canada

Licensed retail sales grew just 2.3% in 2017 to reach \$109 billion in the U.S./Canada—the slowest rate of growth observed since 2014, according to *TLL's Annual Licensing Business Survey*. Licensed sales only marginally outperformed GDP; the U.S. economy expanded by 2.2% and the Canadian by 3% in 2017. This last year marks the seventh year of positive growth for the region; the licensing business grew 3.2% in 2016 and 3.4% in 2015.

Overall American retail sales grew 4.2% in 2017, following annual increases of 3.2% in 2016, and 2.6% in 2015, according to the U.S. Commerce Department. Up north, total Canadian location-based retail sales were up 6.7%, according to Statistics Canada figures. Despite this rise in activity, licensed goods are not seeing strong returns.

It was one of the more difficult years in recent memory, in which licensed brands had to compete with private label as well as manufacturer-branded goods. Faced with a tighter buying environment, many retailers chose to invest in owned brands and limit shelf space for competing licensed products—and customers responded positively to lower prices and better quality. (It is true that instances of newly signed DTR deals were up in 2017. But overall, the market for these types of deals is declining as stores close.)

The biggest distribution trends cited by *Survey* respondents for 2017 were the rise of ecommerce and the expanding importance of “lower” retail channels where low-price, impulse purchases dominate. Some licensors dragged their feet on approving their brand(s) for sale online, while others flooded the mass market with cheap product, and others still signed tens of licensees for the same product category in the same market.

In short, licensed goods lost a bit of their patina as indicators of exclusive, premium

value. Expectations were set too high, buys and minimum guarantees were set too large, and there was, inevitably, backlash.

Almost 60% of *Survey* respondents expect their business to grow in 2018—down from 67% last year. Of those predicting growth, nearly half are looking at growth of 20% or

Continued on page 3

ROYALTIES

Average Royalty Edges Up 0.5% to Reach 8.79%

The average royalty rate across all property types and product categories edged up 0.5% in 2017 to reach 8.79% in the U.S./Canada. This marks the seventh straight year of gradual growth; the average royalty was 8.75% in 2016 and 8.73% in 2015. Since 2005, the average royalty rate across property types and product categories has remained in the 8.6–8.8% range.

Over half of all respondents (61%) to *TLL's Annual Licensing Business Survey* said that royalty rates were flat in 2017; 35% said they were up and just 4% had their average royalty rate drop. Of those reporting fluctuations, the change in royalty was, on average, just one-half of a percentage point for most categories. Some of the most volatile categories, however, like entertainment properties and licensed apparel, saw swings of up to five percentage points.

For the fifth year in a row, entertainment/character commanded the highest rise in average royalties, after increasing 1.5% in 2016 and 1.4% in 2015. In particular, A-list franchises like Disney's Marvel and Star Wars were cited as the primary instigators behind the greater demand.

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➡ Licensing Ledger

Strategic Marks is looking to open 1,000 pop-up stores to sell toys this holiday season under its **KB Toys** trademarks, which the company acquired in 2016 (from Toys 'R' Us). Strategic Marks is courting alliances with stores experienced in pop-up retail like **Spencer Spirit Holdings**, **Go! Retail Group**, and **Party City Holdco**. The company estimates that half a billion dollars' worth of toys been produced for **TRU** with no place to go.

A chain of mall-based stores, **KB Toys** officially closed in 2009 after liquidation of its physical assets began in late 2008. Its name, logo, and other IP were sold to **TRU** for \$2.1 million. **TRU** allowed the trademark to lapse in June 2016, and **Strategic Marks** picked it up in December 2016.

Asmodee Group launches a new division devoted to developing content based on its owned IP, primarily through strategic partnerships and licensing. **Asmodee Entertainment** will be the launching ground for new films, TV series, and comics and graphic novels. Already in development is a film based on the board game **Catan**, which is being adapted by **Sony Pictures**.

Striker Entertainment strikes a first-look television development deal with **Blumhouse Television**. **Striker** will join **Blumhouse** in developing franchises around existing brands, video games, and consumer products—including a potential film based on indie horror video game **Five Nights at Freddy's**.

DC Entertainment signs an exclusive five-project deal, including at least two original book projects, with **Frank Miller**. The deal is part of broader efforts to beef up DC's trade efforts with renowned comics authors that also have consumer appeal in the book trade, as well as publishing content in more formats.

Number 6 Enterprises will operate **DC Boutiques**, new **DC**-branded retail activations, at over 18 regional comic conventions in the U.S., Canada, and the U.K. this year to reach nearly 1.2 million fans. The boutiques will offer rare variants and licensed merchandise, host signings, and feature contests and giveaways.

Snap partners with **StudioMDHR's Cuphead** (represented by **King Features**), **Allegorithmic**, and **Klei Entertainment's Don't Starve** to showcase its new AR technology. Among other things, the partnership has resulted in a new 2D Cupped lens where users can jump into the classic run-and-gun action game alongside its 1930s cartoon-inspired characters.

Canada Goose partners with the **FDNY Foundation** to release 400 limited edition jackets inspired by the uniform worn by NYC firefighters on the front lines. The "Bravest" coat is adorned by patches representing five firehouses; all proceeds go to the **FDNY Foundation** to support initiatives such as fire safety education and help pay for smoke and carbon monoxide detectors in fire-prone neighborhoods. The **NY Post** reports that **PETA** apparently tried to persuade the Foundation to pull its support for the jacket, which has no fur or feathers.

Mattel property **Thomas & Friends** joins with **London Bridge** for a 4-week campaign to promote free wifi in the station as well as **Thomas'** new summer film. Electronic billboards lead families to the wifi portal and an interactive **Mattel "kid's zone"** with video content, books, and activities.

Mixed martial arts league the **Professional Fighters League** (**PFL**) partners with **Mark Burnett**,

President of **MGM Television Group & Digital** and **MGM Television**, to develop and produce new programming for **PFL's** upcoming season. **MGM** and **Burnett** join as **PFL** investors and **Burnett** joins its advisory board. The **PFL 2018** league season debuts June 7 and consists of 11 events live on **NBC Sports Network** and **Facebook Watch**.

Ninja Divison cuts back from **Kickstarter**, citing its poisonous ecosystem as the primary reason the game publisher won't be using the crowdfunding service for large projects. A study by **ICO Partners** found that total monies raised for tabletop game projects funded on the platform grew 36% to \$137 million in 2017.

Endeavor's premier mixed martial arts organization celebrates its 25th anniversary with its 'Faces of UFC' campaign. **UFC** is soliciting personal fan stories through social media with a sweepstakes in the U.S., Canada, Mexico, U.K., and Ireland as well as separate fan activations worldwide.

Warner Bros. Consumer Products teams up with U.S. youth organization **generationON** to launch **Scooby-Doo "Doo Good,"** a social campaign designed to help the environment, fight hunger, and improve animal welfare. The pro-social initiative will launch 35 new Kids Care Clubs in the US, as well as fund \$500 grants to support kids and adult mentors in helping their communities.

Hasbro launches a pilot program that will allow consumers to send their unwanted toys to recycling company **TerraCycle**, which will then transform them into materials that can be used in a number of projects including play spaces, flower pots, and park benches. This is the first such brand-sponsored program; **Hasbro** will send prepaid shipping labels to all consumers who sign up in the contiguous U.S.



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Licensed Sales Up 2.3%

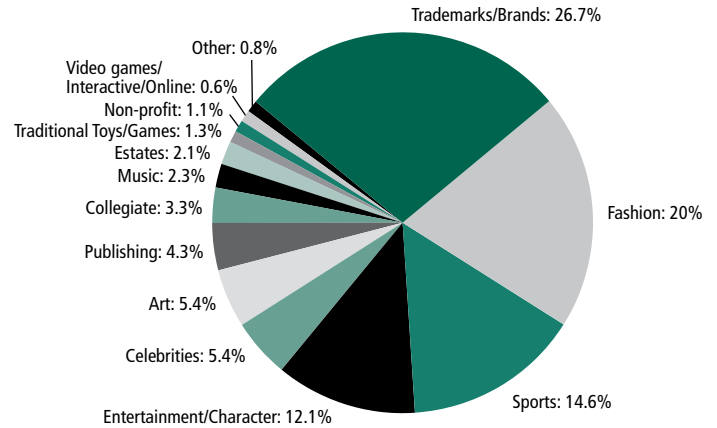
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higher. Most respondents cited compressed margins, market saturation, and increased costs when outlining their biggest hurdles to overcome going forward. Because of these concerns, over 40% of respondents expect to see flat or slightly declining growth in their business over the next year.

As in previous years, entertainment/character-based properties drove licensed retail sales in the U.S./Canada. Unlike previous years, however, the property type saw much less dramatic growth of 3.4%, compared to 7.6% in 2016 and 8.0% in 2015. It was only one of five categories to outperform the average growth rate with sports and video games/interactive/online a close second (both up 3.2%), followed by music (2.7%) and corporate trademarks/brands (2.5%).

Entertainment/character-based licensing grew by \$435 million in 2017 to reach \$13.2 billion in retail sales or just over 12% of the U.S./Canada total. But the category's 3.4% growth rate was far from uniform—the brand landscape was extremely volatile, with a handful of brands single-handedly lifting the category from what would have otherwise been double-digit declines.

SHARE OF RETAIL SALES OF LICENSED MERCHANDISE, BY PROPERTY TYPE, U.S./CANADA, 2017



SOURCE: THE LICENSING LETTER

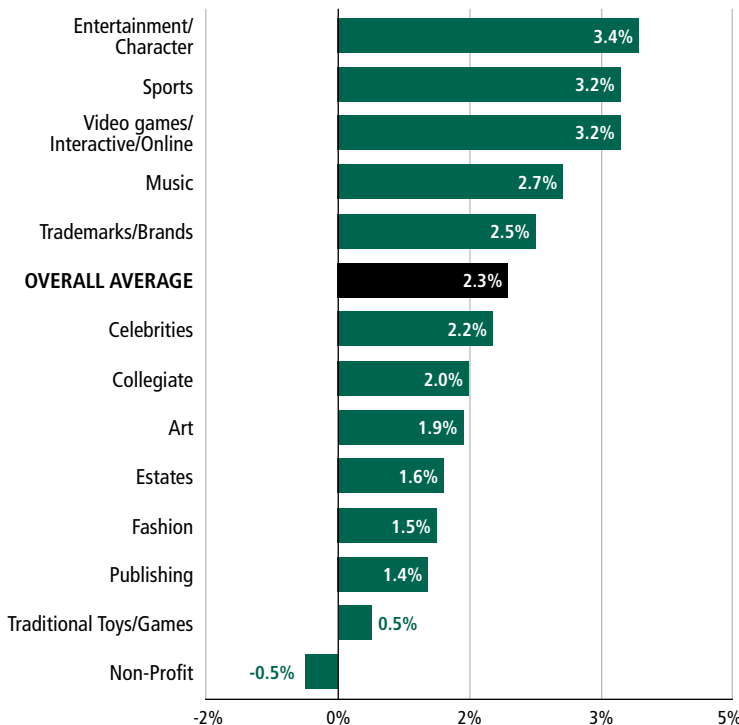
Many were disappointed by underperforming “sure hits” like *Cars 3* and *Despicable Me 3*—and even *Star Wars* stumbled, although it continued to perform relatively well (think low-double-digit growth versus the triple-digit gains seen with the first *Star Wars* reboot). Notably, the “character” part of the category saw stiff declines. Such brand volatility and consumer fatigue emerged before Toys ‘R’ Us announced bankruptcy—and, to put it mildly, that wasn’t too helpful for the toys/games industry.

Surprisingly, musicians (2.7%), celebrities (2.2%), and even estates (1.6%) picked up some of the slack as consumer demand for pop-culture and novelty brands grew in product categories where entertainment/character has struggled to secure a foothold like fashion apparel and health & beauty aids (i.e., increasingly upscale, mostly-adult oriented categories). Coming off years of declines (-1.5% in 2016 and -1.7% in 2015), the roughly \$2.48 billion in retail sales music-based licensing generated in 2017 falls short of the recent 2013 high of \$2.56 billion.

Artists (1.8%) and fashion designers (1.5%) saw a welcome boost in licensed sales even as the market for domestics and home accessories, design, and improvement grew increasingly crowded.

This was the same trend powering some corporate trademarks/brands—which continue to be the largest property type by share of retail sales in the U.S./Canada. In 2017, the category grew by \$710 million (or 2.5%) to reach just under \$29.2 billion in licensed retail sales. Hardware, appliance, and tool was the fastest-growing subcategory at 3.6% growth and \$3 billion in licensed sales, following a 4.0% jump in 2016. Last year, the category grew thanks to an increase in licensors moving manufacturing out-of-house for

GROWTH IN RETAIL SALES OF LICENSED MERCHANDISE, BY PROPERTY TYPE, U.S./CANADA, 2016–2017



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

SOURCE: THE LICENSING LETTER

**RETAIL SALES OF LICENSED MERCHANDISE,
BY PROPERTY TYPE, U.S./CANADA, 2016–2017**
(Figures in Millions)

PROPERTY TYPE	RETAIL SALES, 2017	RETAIL SALES, 2016	CHANGE, 2016–2017	SHARE OF MARKET, 2017
Art	\$5,858	\$5,753	1.8%	5.4%
<i>Art and Artists</i>	\$4,362	\$4,289	1.7%	4.0%
<i>Museums</i>	\$1,496	\$1,464	2.2%	1.4%
Celebrities	\$5,915	\$5,789	2.2%	5.4%
<i>Entertainers/Models</i>	\$2,655	\$2,619	1.4%	2.4%
<i>Chefs/Home-Related</i>	\$2,194	\$2,147	2.2%	2.0%
<i>Digital/Other</i>	\$1,065	\$1,023	4.1%	1.0%
Collegiate	\$3,578	\$3,508	2.0%	3.3%
Entertainment/Character	\$13,215	\$12,781	3.4%	12.1%
Estates	\$2,330	\$2,294	1.6%	2.1%
Fashion	\$21,776	\$21,449	1.5%	20.0%
<i>Apparel</i>	\$18,423	\$18,204	1.2%	16.9%
<i>Footwear</i>	\$2,621	\$2,557	2.5%	2.4%
<i>Home</i>	\$732	\$688	6.4%	0.7%
Music	\$2,478	\$2,413	2.7%	2.3%
Non-profit	\$1,239	\$1,245	-0.5%	1.1%
Publishing	\$4,637	\$4,574	1.4%	4.3%
<i>Books</i>	\$485	\$485	0.0%	0.4%
<i>Newspapers/Magazines</i>	\$2,875	\$2,818	2.0%	2.6%
<i>Comic Books/Strips</i>	\$1,278	\$1,271	0.5%	1.2%
Sports	\$15,915	\$15,422	3.2%	14.6%
Trademarks/Brands	\$29,155	\$28,445	2.5%	26.7%
<i>Automotive/Motor Vehicle</i>	\$4,336	\$4,230	2.5%	4.0%
<i>Food/Beverage</i>	\$8,143	\$7,922	2.8%	7.5%
<i>Restaurants</i>	\$4,732	\$4,685	1.0%	4.3%
<i>Sporting Goods</i>	\$1,335	\$1,331	0.3%	1.2%
<i>Hardware, Appliance and Tool</i>	\$3,038	\$2,933	3.6%	2.8%
<i>Home-related</i>	\$405	\$395	2.5%	0.4%
<i>Electronics/Technology</i>	\$3,458	\$3,363	2.8%	3.2%
<i>Electronic Media</i>	\$230	\$225	2.0%	0.2%
<i>Other</i>	\$3,478	\$3,360	3.5%	3.2%
Traditional Toys/Games	\$1,433	\$1,426	0.5%	1.3%
Video games/Interactive/Online	\$626	\$607	3.2%	0.6%
<i>Other</i>	\$855	\$833	2.6%	0.8%
TOTAL	\$109,010	\$106,538	2.3%	100.0%

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

SOURCE: THE LICENSING LETTER

core products; in 2017, they began ramping up production of adjacent merchandise. It was followed by food/beverage and electronics/technology with 2.8% growth each.

Sports brands continued to grow market share, jumping 3.2% to reach \$15.9 billion in licensed retail sales in the U.S./Canada. Although growth was flattish compared to 2016 (4.3%) and 2015 (4.8%), the top five professional sports leagues powered through expansions to their licensing programs at every price point and in every product category. Plus, there was a boost from other leagues that launched new programs.

Publishing-based brands (up 1.4% to reach \$4.6 billion) were largely driven by lifestyle magazine brands (overall, the subcategory was up 2%) in the apparel and home fashion spaces, but periodicals focused on music and sports also did well. Continuing a years-long trend, licensees are not looking to book or comic-based brands directly, but instead to their film or TV adaptations.

The traditional toys/games brands category was flat at 0.5%, growing just \$7 million to reach \$1.4 billion in licensed retail sales following years of regular growth (3% in 2016 and 2.5% in 2015). Licenses were dwarfed by manufacturer brands like LOL Surprise!, Hatchimals, and Fingerlings, but did not fall into the red because of activity from those very same brands.

The video games/interactive/online category grew \$19 million, or 3.2%, to reach \$626 million in licensed retail sales. While activity was certainly up, most sales were centered on impulse and other low-price point goods. Mobile game apps were largely a non-story as they have somewhat retreated from the merchandising space.

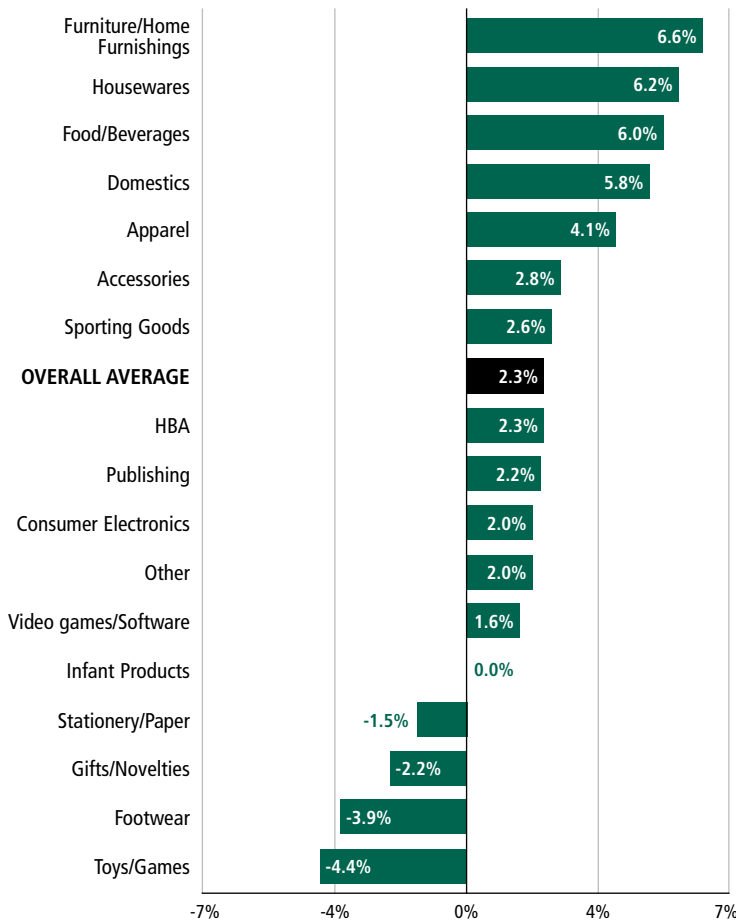
Home-related Product Categories Boost Licensed Growth in 2017

As brands of all stripes continue to branch out into more product categories, large shifts in retail sales by property type have become less common. The biggest indicator of success in 2017 was the product category in which brands were licensed. It is important to note, however, that some product categories saw the number of actual unit sales drop in 2017 and only recorded a rise in sales thanks to increased pricing.

Seven product categories out-performed the overall average growth of 2.3% for licensed retail sales in 2017 for the U.S./Canada. But that means that the spread was much wider—retail sales of licensed footwear contracted 4.3% from 2016, losing more in value than gifts/novelties (-2.2%) and stationery/paper (-1.5%).

Home-related goods raised a combined \$620 million in licensed retail sales in the U.S./Canada in 2017. These five categories grew a combined 6% from 2016—outperforming the average rate of growth by 3.2 percentage points. Growth was fueled by sustained consumer demand—thanks to the economy, Millennials are moving out of family homes (or crowded roommate situations) and everyone else finally

**GROWTH IN RETAIL SALES OF LICENSED MERCHANDISE,
BY PROPERTY TYPE, U.S./CANADA, 2016–2017**



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

has the means to take up that home renovation project they’ve been putting off for years. Social media channels such as Pinterest and Instagram led trend discovery among an audience who increasingly sees themselves as hands-on home designers. The do-it-yourself trend also fueled purchasing activity in functional home accessories and hardware. Surprisingly, there was a dip in related categories such as home fragrance and decorative novelties.

Over the last couple of years, the merchandising window for home-related goods has gotten much smaller; to keep up with demand, manufacturers and retailers are tapping more fashion, home, and surface designers for innovative ideas. But as the popularity of social media might imply, brick-and-mortar showrooms are not strictly necessary. Amazon recorded double-digit sales growth in its home categories in 2017. Corporate and magazine brands also saw a boost in sales by leveraging their respective relationships with consumers into “lifestyle” brands and broader community platforms.

- ▶ The furniture/home furnishings segment was up 6.6%, housewares were up 6.2%, and domestics were up 5.8% for largely identical reasons—an increase of new brands entering the space, established brands building more extensions, and sustained consumer demand for fashionable, functional goods.
- ▶ Hardware and paint was up 3.5%, in part because of increased licensing activity for existing brands moving into complementary segments and the increase in women consumers for DIY projects.
- ▶ Gardening was up 3.3%. This is a segment *TLL* expects to grow as new innovations in the sub-category allow for packaged live plants to be sold as impulse, among other things.

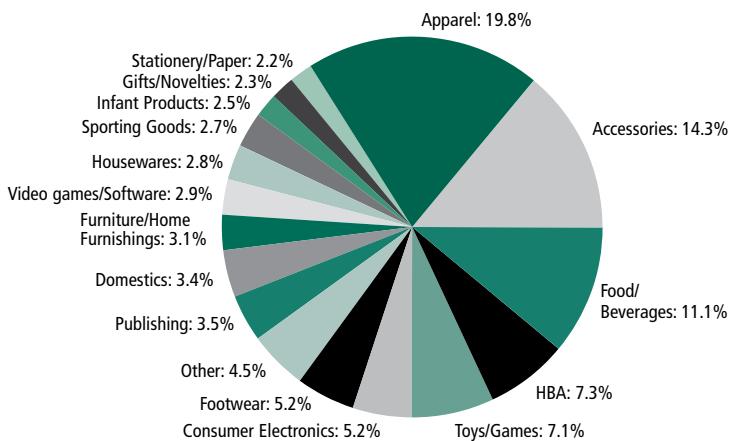
Retail sales of licensed apparel and accessories goods were up a combined 3.5% in 2017, adding over \$1.2 billion in value in the U.S./Canada. The two product categories generated a combined \$37.2 billion in licensed retail sales, or just over 34% of the greater total.

Sales of licensed apparel merchandise were up by 4.1% to reach \$21.6 billion in the U.S./Canada in 2017—a slower rate of growth than that observed in 2016 (5.8%) and 2014 (6.6%). Nevertheless, the category, which constitutes 19.8% of all licensed sales, grew by over \$850 million from the previous year. Entertainment/character brands grew by almost 10% in this category, but overall growth was flat at around 1-2% in 2017. Sports and fashion brands continued to steer growth at rates observed in the last couple of years. Consumer demand for athleisure and nostalgia continued to drive sales into 2017, with music-based brands, in particular, seeing a broader boost compared to 2016.

Accessories remained stable at 2.8% growth in 2016, reaching an overall \$15.6 billion in retail sales after relatively flattish growth of 1.8% in both 2016 and 2015.

- ▶ Eyewear grew 3.5%, even as certain big-label fashion houses brought licensing in-house in 2017. Undaunted, eyewear manufacturers were bullish in securing new brands from the fashion space and ensuring that prices remained competitive.
- ▶ Handbags, backpacks, and messenger bags grew 3.2% after falling 1% in 2016 and 2015. Increased collaborations between fashion houses (who had largely brought their programs in-house) and property types like entertainment/character and music drove growth for the adult consumer.
- ▶ Headwear continues to perform well at 2.5% growth thanks to the overall streetwear trend in popular culture, making extensions feasible for a variety of brands. Sports licensing for caps continues to drive the category.
- ▶ Hosiery was up 2.2% as fashionistas continued to invest in high quality, high price branded designs in leggings, stockings, and socks.

SHARE OF RETAIL SALES OF LICENSED MERCHANDISE, BY PRODUCT CATEGORY, U.S./CANADA, 2017



SOURCE: THE LICENSING LETTER

- ▶ Sales of licensed jewelry and watches went up 2.3%, in part because of an influx of licensed brands. Unit sales were largely flat however, with many deals being struck primarily for their promotional value. Higher, luxury-priced ranges sold particularly well.
- ▶ Luggage and travel accessories went up 1.9% as travel and airport sales increased more broadly in 2017.
- ▶ Scarves and ties were up 1.0%, following years of steady declines (-1% in 2016 and -1.6% in 2015). Men's accessories were the strongest performers, especially for the formal and the more upscale everyday sub-categories.

Retail sales of licensed food/beverage products were up for the eighth year in a row by 6% to reach \$12.1 billion in retail sales after growing 6% in 2016 and 6.7% in 2015. Shelf opportunities are ever-expanding as retailers not traditionally associated with food, like drugstores and gas stations, have positioned themselves as a convenient, fast, and quality source of on-the-go snacking consumables. Retail sales of healthy foods and beverages (non-GMO, natural, organic, etc.) are growing at double-digit rates and can carry a higher price premium among consumers, who are willing to pay more for perceived quality. In part because growth is so sustained in this category, competition is intense.

Health & beauty aids grew 2.3% to reach nearly \$8 billion in licensed retail sales. As in home-related goods, this space is being rapidly re-invented by ecommerce shoppers, social discovery and marketing, and an influx of brands tapping new niches. Unlike in entertainment/character, beauty brands tend to embrace the competition as sparking diversity in a high growth, high potential space. The demand for healthy, all-natural, and convenient goods is no less in this category than for licensed food/beverage.

RETAIL SALES OF LICENSED MERCHANDISE, BY PROPERTY TYPE, U.S./CANADA, 2016–2017 (Figures in Millions)

PRODUCT CATEGORY	RETAIL SALES, 2017	RETAIL SALES, 2016	CHANGE, 2016–2017	SHARE OF MARKET, 2017
Accessories	\$15,608	\$15,185	2.8%	14.3%
<i>Eyewear</i>	\$5,081	\$4,909	3.5%	4.7%
<i>Handbags, Backpacks, Messenger Bags</i>	\$2,094	\$2,030	3.2%	1.9%
<i>Headwear</i>	\$1,448	\$1,412	2.5%	1.3%
<i>Hosiery</i>	\$605	\$592	2.2%	0.6%
<i>Jewelry and Watches</i>	\$3,653	\$3,571	2.3%	3.4%
<i>Luggage and Travel Accessories</i>	\$1,491	\$1,463	1.9%	1.4%
<i>Scarves and Ties</i>	\$154	\$152	1.0%	0.1%
<i>Other</i>	\$1,082	\$1,055	2.5%	1.0%
Apparel	\$21,616	\$20,764	4.1%	19.8%
Consumer Electronics	\$5,683	\$5,572	2.0%	5.2%
Domestics	\$3,755	\$3,550	5.8%	3.4%
Food/Beverages	\$12,116	\$11,430	6.0%	11.1%
Footwear	\$5,620	\$5,848	-3.9%	5.2%
Furniture/Home Furnishings	\$3,399	\$3,189	6.6%	3.1%
Gifts/Novelties	\$2,556	\$2,614	-2.2%	2.3%
HBA	\$7,937	\$7,760	2.3%	7.3%
<i>Fragrance</i>	\$3,981	\$3,942	1.0%	3.7%
<i>Hair Accessories</i>	\$265	\$262	1.0%	0.2%
<i>Cosmetics/Nail Polish/Other</i>	\$3,691	\$3,556	3.8%	3.4%
Housewares	\$3,086	\$2,906	6.2%	2.8%
Infant Products	\$2,722	\$2,722	0.0%	2.5%
Publishing	\$3,844	\$3,761	2.2%	3.5%
Sporting Goods	\$2,986	\$2,911	2.6%	2.7%
Stationery/Paper	\$2,351	\$2,387	-1.5%	2.2%
Toys/Games	\$7,703	\$8,057	-4.4%	7.1%
Video games/Software	\$3,118	\$3,069	1.6%	2.9%
Other	\$4,908	\$4,813	2.0%	4.5%
<i>Hardware and Paint</i>	\$345	\$333	3.5%	0.3%
<i>Gardening</i>	\$236	\$229	3.3%	0.2%
<i>Pet Products</i>	\$474	\$443	7.0%	0.4%
<i>Funerary</i>	\$9	\$9	1.0%	0.0%
<i>Automotive Accessories</i>	\$409	\$396	3.5%	0.4%
<i>Boats and Vehicles</i>	\$526	\$524	0.5%	0.5%
<i>Other</i>	\$2,909	\$2,880	1.0%	2.7%
TOTAL	\$109,010	\$106,538	2.3%	100.0%

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

SOURCE: THE LICENSING LETTER

Retail sales of licensed toys/games contracted 4.4% in 2017, losing \$355 million in value from the previous year to reach \$7.7 billion. Licensed goods were particularly hard hit by economic factors like the Toys ‘R’ Us bankruptcy; the general market is expected to be flat at 0-1% growth in 2017, according to the NPD. Growth largely came from manufacturer-owned brands, which are expected to launch their own licensed extensions in 2018.

One area that did not perform well in 2017 was the broader infant category—in part because of declining birth rates, and in part because of an increasing tendency of new parents to construct a “brand-free” and “label-free” environment for their offspring. Modern families want less distinctive, cool color swatches; fashionable, subtle patterns; and simple, uncluttered baby rooms. Brands that have established trust and credibility, however, will do very well.

COLLEGIATE

NCAA Tournament Scores \$20–35 Million in Licensed Retail Sales

According to *TLL’s Annual Licensing Business Survey*, collegiate properties generated \$3.6 billion in licensed retail sales in the U.S./Canada in 2017. That marks a 2% increase from 2016, and includes all colleges, universities, and their respective sports teams. More specifically, *TLL* estimates that retail sales of collegiate properties tied to the **NCAA** Tournament alone generate anywhere between \$20–35 million in a year. Licensed retail sales tied to the professional **NBA** league, by contrast, totaled \$2.75 in 2016 with a 8.3% rise from 2015 (2017 figures have not yet been finalized).

The **Villanova** Wildcats became just the eighth school to win at least two NCAA men’s basketball championships in a three-season span. And while the team had the crowning win, it wasn’t the only winner in this year’s NCAA tournament.

The breakout licensing story has been **Loyola-Chicago**, the first No. 11 seed to reach the championship game. Its Gryffindor-esque colors; colorful 98-year-old team chaplain, Sister Jean Dolores Schmidt; and uplifting Cinderella story charmed the hearts of viewers around the world. And according to **Fanatics**, Loyola was leading all college teams—including fellow Final Four contenders Kansas, Michigan, and Villanova—in merchandise sales in the lead-up to the final game.

In approving her image and likeness for use on merchandise including socks, t-shirts, and other apparel gear, Sister Jean directed that royalties be directed to the Loyola Athletic Fund. The most popular merchandise, according to the school’s accounts, was a bobblehead (over 5,000 sold in 48 hours). Note that NCAA rules prohibit sales of bobbleheads and other individual merchandise for college players, who are prohibited from exploiting their own name and image. A portion of bobblehead sales also go to support Schmidt’s Sisters of Charity of the Blessed Virgin Mary. Loyola’s agent, Learfield Licensing Partners, confirmed that the school’s cut was a standard 12% royalty.

And while the Jayhawks didn’t end up winning the national title either, the **University of Kansas** will get a nice boost to its licensing program. KU Athletics estimates that it could earn between \$200,000–300,000 in licensing revenue from this tournament (translating to roughly \$2.5–3.6 million in retail sales), which would be split evenly between KU Athletics and the university.

Curious as to what a typical royalty scheme looks like for a collegiate program? According to KU Athletics, its standard royalty rate is 12% for licensed products; during the NCAA Tournament, the rate climbs to 18%, with the NCAA taking 6% and the university taking 12% of the wholesale price. A Final Four-themed product, featuring the four competing teams in its design, would yield 3% of sales to each school.

LICENSING LAW

Legal: The Good, the Bad & the Weird

In the latest of a bizarre series of events surrounding comics legend **Stan Lee**, it turns out that blood allegedly stolen from him late last year was sold at the Las Vegas **Marvel Avengers S.T.A.T.I.O.N.** A former business associate converted the vials of blood into “Solvent DNA Ink” and used it to stamp Lee’s signature on several comic book issues. The officially licensed exhibition and retail store pulled the comics off shelves, stating that the goods from Hands of Respect LLC and DLK Brand Consulting LLC appeared to be certified and obtained with authorization. Editions were allegedly sold for \$250 and \$500 each.

The **Emoji Co.** gets a legal win in Asia in its broader “crackdown” on counterfeiters and trademark copyright infringers. It obtained a court order against **Emoji King Ltd.**, Hong Kong prohibiting the unauthorized use of its emoji and emoji-family marks.

After nine long years, **Gucci** and **Guess** have settled their legal battle over the Guess logo and diamond pattern, putting an end to litigations pending in Italy, France, Australia, and China. Stateside, the matter had already been decided: In 2012, the fashion company was awarded \$4.7 million in damages for Guess’ breach. On the other hand, the EU general court and judgements in Italy and France ruled in favor of Guess on the same claims.

MGA Entertainment (**MGAE**) is awarded \$1.1 million against 81 counterfeiters. The infringers had been selling fake L.O.L. Surprise! goods as recently as late last year on digital marketplaces Alibaba.com, Aliexpress.com, and DHGate.com. Separately, MGAE was issued a patent covering the unique and original attributes of its L.O.L. Surprise! product including the ball itself.

Licensing News

Properties Available Or Recently Assigned, U.S.

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Charles Atlas	Father of modern-day bodybuilding and American fitness icon with famous advertisements known for continuously appearing in comic books and magazines since the 1930's.	All	Vivian Velasco, Pacific Swell Brands
Country Diary of an Edwardian Lady	Book featuring a naturalist's diary for the year 1906 in which Edith Holden recorded with words and illustrations the seasonal changes in flora and fauna of the English countryside.	All	Carole Postal, Spotlight Licensing & Brand Management
Galentine's Day (2-13-XX)	A fresh take on a new Valentine's Day brand set to launch in 2019 with placement in major retailers.	All	John Raisin, WCN Group/West Coast Novelty
MyCustomCandy	Candy brand prints custom candy conversation with your own text, emojis or logos and manufacturers "CutieHearts" replacing the soon to be extinct classic candy hearts.	Custom candy bags & cubes, custom candy hearts, custom printed mints	Sarah Hannington, MyCustomCandy
Sofie Dossi	Fashion and lifestyle social influencer with over 1.3 million followers, best known for her golden buzzer winning performance on America's Got Talent and her "no limits" attitude.	All	Steven Heller, Brand Liaison (The)
University of Minnesota	American university with Gopher Athletics has one of the oldest and most decorated athletics department's in the country.	All	Cory Moss, IMG College Licensing (form. Collegiate Licensing Co./CLC)

Licenses Recently Granted, U.S.

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Alice Cooper	Funko	Pop vinyl figures	Global Merchandising Services
Alien	ThinkGeek	Collectibles, novelties	20th Century Fox Consumer Products
American Mens	Hasbro	Games (children's)	American Mensa
	Skyhorse Publishing	Puzzle books	
	Workman Publishing	Desk calendars	
Backstreet Boys	Funko	Pop vinyl figures	Global Merchandising Services
Batman (animated)	IDW Publishing/IDW Games	Board games	Warner Bros. Consumer Products
Betty Boop	H3 Sportgear	Cold weather knit accessories, fleece, headwear, long sleeve tops, t-shirts (adults')	King Features Syndicate
	Rockin Pins	Limited edition enamel pins	
	Scientific Games	Slot machines	
Care Bears	Integrity Vitamins & Supplements LLC	Vitamins	Seltzer Licensing Group
Chelsea Boot Company (The)	Jerry Leigh Apparel	Apparel (men's, women's), socks	Chelsea Boot Company (The) div. Global Rebels
Court of the Dead	USAOPOLY	Board games	Sideshow Collectibles
Disney Princess	Rubie's Pet Shop Boutique div. Rubie's Costume	Pet costumes	Disney Consumer Products
Dog for Dog	G Mason Group	Pet products	All-American Licensing & Management Group (AALMG)
Dog is Good	Creative Pet Group, LLC	Pet products	Brentwood Licensing
	Kroto dba iCanvasART	Canvas prints	
	Wellspring	Giftware	
	Willow Creek Press	Books, calendars, greeting cards, prints, puzzles	
	Yellow Dog Designs Inc.	Pet products	
Domino	Lenox	Dinnerware	Domino Media Group
Dunkin' Donuts	Saucony	Sneakers	Dunkin' Brands
Fantastic Beasts & Where to Find Them	USAOPOLY	Dice games	Warner Bros. Consumer Products
Florence Broadhurst	York Wallcoverings & RoomMates	Wallpaper	Valero Enterprises
Ghost	Funko	Pop vinyl figures	Global Merchandising Services
Harry Potter	USAOPOLY	Board games	Warner Bros. Consumer Products
Hollywood Reporter (The)	Kalco Lighting & Allegri Crystal by Kalco	Lighting, mirrors	Hollywood Reporter (The) - Billboard Media Group
It's All Wild by Eva Gutowski	ColourPop Cosmetics	Cosmetics	It's All Wild
Jennifer Adams	Orian Rugs	Area rugs	All-American Licensing & Management Group (AALMG)
Jennifer Lopez	Inglot U.S.A.	Cosmetics	CAA-GBG Global Brand Management Group

*Extension or renewal.

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Licensing News *Continued from page 8*

Licenses Recently Granted, U.S.

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Jurassic Park	Gen Art	Apparel	Universal Brand Development
LA Gear	Forever 21	Apparel	ACI International
Little Prince (The)	Dezign Your Mind	Shower clings	Licensing Works!
	Lesportsac	Backpacks, bags	
	Litographs	Posters, scarves, t-shirts	
	Little Unicorn	Bedding (infants')	
	Running Press Book Publishers	Mini kits	
	Socksmith Design	Socks	
	Storiarts	Blankets (infants'), caps (infants')	
	Vinca	Earrings, necklaces	
Walls360	Wall graphics		
Mariah Carey	Funko	Pop vinyl figures	Global Merchandising Services
Mickey Mouse & Friends	Rubie's Pet Shop Boutique div. Rubie's Costume	Pet costumes	Disney Consumer Products
Motley Crue	Funko	Pop vinyl figures	Global Merchandising Services
Mutts	Andrews McMeel Publishing	Books	King Features Syndicate
My Little Pony	GLAMGLOW	Masks	Hasbro
Natural History Museum (London)	FatFace	T-shirts (children's)	Natural History Museum (London)
Paddington Bear	Steiff North America	Plush	Republic Records div. Universal Music Group
philoSophie's by Joanna Alberti	Pyramid America	Journals, mugs, posters, stationery	Serenata Group (The)
Planet of the Apes	Super7	Figures	20th Century Fox Consumer Products
Popeye	H3 Sportgear	Cold weather knit accessories, fleece, headwear, long sleeve tops, t-shirts (adults')	King Features Syndicate
	Vision/Eleven Apparel Mgmt.	Hoodies, long sleeve tops, sweaters, t-shirts	
Power Rangers	Renegade Game Studios	Tabletop games	Saban Brands
Rob Zombie	Funko	Pop vinyl figures	Global Merchandising Services
Samurai Jack	USAOPOLY	Board games	Cartoon Network Enterprises
Sandlot (The)	Roosevelts (The, RSVLTS)	Button-down shirts	20th Century Fox Consumer Products
Sister Jean	Fanatics	T-shirts	Loyola University Chicago
	National Bobblehead Hall of Fame & Museum	Bobbleheads	
Slayer	Funko	Pop vinyl figures	Global Merchandising Services
Sonic the Hedgehog	IDW Publishing/IDW Games	Board games	SEGA of America
Street Fighter	Jasco Games	Board games	Capcom U.S.A.
Tapatio Hot Sauce	Bentex Group	T-shirts	Brand Central
	King Oscar	Canned sardines	
	New Castle Beverage	Beverage mixes	
	NHS	Skateboard kruz trucks	
	Scott Brothers Dairy	Dips, sour cream	
	StarKist (div. Dongwon Group)	Canned seafood	
	Trau & Loevner Imprinted Apparel	Fashion apparel	
	United Exchange Corporation (UEC)	Ramen noodles	
Tim Burton's The Nightmare Before Christmas	Rubie's Pet Shop Boutique div. Rubie's Costume	Pet costumes	Disney Consumer Products
Toy Story			
UGG x Heron Preston	HPC Trading Co.	Footwear	ICNCLST (Iconoclast Artist Management, LLC)
UglyDolls	Jay Franco & Sons	Bath products, beach products, bedding, home products, pillows	White Space Entertainment
Vogue Living	Dorya	Furniture	Condé Nast Licensing
Winnie the Pooh & Friends	Rubie's Pet Shop Boutique div. Rubie's Costume	Pet costumes	Disney Consumer Products

*Extension or renewal.

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International Properties Available or Recently Assigned

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
44 Cats	Animated series about a group of cats who act normally when they're around people, but act just like humans when they are on their own.	All (Worldwide)	Cristiana Buzzelli, Rainbow S.r.l.
Addams Family (The animated film)	New film centers around the adventures of the favorite creepy, spooky, kooky family.	All (North America)	Jay Asher, Brandgenuity
Anna and the Apocalypse	British Christmas zombie musical film follows a teenager and her high school friends as they fight, sing, and dance to survive in the midst of an undead horde.		
Authentic Hendrix	Program pays homage to rock musician Jimi Hendrix, whose electric guitar style defined a generation. Merchandise timed to milestone moments begins launching summer 2018.	All (Worldwide)	Lisa Streff, Epic Rights Norman Perry, Perryscope Productions
BabyRiki	Animated series focused on a child's life. Features musical stories based around age-appropriate experiences with educational concepts.	All (China, Hong Kong, Macau, Taiwan)	Ivan Chan, Promotional Partners Worldwide (PPW)
Bananya	Japanese animated series follows the funny adventures of cute, quirky kittens who live in bananas.	All (U.K.)	Rob Wijeratna, Rocket Licensing
BMW Group	Multinational company known for manufacturing of premium automobiles and motorcycles. Brands include BMW, MINI, and Rolls Royce.	All (Worldwide)	Jay Asher, Brandgenuity
BROOKLYN	Nostalgic Italian chewing gum brand spanning more than 60 years.	All (Italy)	Maria Grazia Bussandri, Premium S.r.l.
Carmen Sandiego	Animated series stars titular red-coated, fedora-wearing super thief as she learns about her past and explores a fresh set of capers around the globe.	All (Worldwide)	Jay Asher, Brandgenuity
Creed 2	American sports drama film. Under the tutelage of Rocky Balboa, light heavyweight champion Adonis Creed faces off against Vitor Drago, son of Ivan Drago.	All (North America)	
Dragon Ball Super	Japanese anime continuing the adventures of Goku after defeating Majin Buu. He now encounters new worlds and new warriors to fight.	All (U.S., Canada)	Adam Zehner, FUNimation/Group 1200 Media
Dragon Ball Z	Japanese anime sequel to Dragon Ball stars Goku as an adult as he defends the Earth with his companions.		
Elf on the Shelf	Children's brand based on illustrated book about magical Scout Elves that help Santa manage his naughty and nice lists by reporting back to him at the North Pole.	All (U.K., Eire)	Rob Wijeratna, Rocket Licensing
EttaVee	Art & design brand created by artist and social influencer; Jessi Raulet, with distinct hand-painted, colorful and bold designs.	All (Worldwide)	Ilana Wilensky, Jewel Branding & Licensing
FlipaZoo	Plush line that flips for you with two plush in one. Over 27,000 user-created YouTube videos; kids can't get enough of the irresistible flipping action plush.	Apparel, arts & crafts, back-to-school, novelties, party supplies (Worldwide)	Cynthia Hall Domine, Synchronicity
Fur Babies World	U.K. toy and series (Bush Baby World) rebranded for the US market. Follows characters who protect the Dream Tree, keeping their magical world in balance.	All (U.S., Canada)	Jay Asher, Brandgenuity
Gaspard & Lisa (Gaspard et Lisa)	Preschool brand created by Anne Gutman and Georg Hallensleben stars two friends as they experience many adventures in their hometown of Paris, France.	All (Japan)	Takeshi Nakamura, Sony Creative Products (SCP)
Hollie Hobby	Character brand with over \$1B in licensed sales updates Holly as an aspirational 13-year-old singer/songwriter in new live-action TV series.	All (U.S., Canada)	Janice Ross, American Greetings Entertainment
Ironsport	New lifestyle brand for those passionate about living a fun, active, fitness-fueled life. Brand slogan "I CAN" represents mindset of being your fittest, strongest, and furthest.	All (Worldwide)	Scott Todd, Graj + Gustavsen (G+G)
Jake Paul	Social media and YouTube star with gender neutral brand has over 85 million fans worldwide.	Accessories, apparel, back-to-school, calendars, drinkware, technical accessories (U.K.)	Ross Misher, Brand Central
Jen Montgomery	Design and lifestyle brand inspired by kitsch, botanicals, and happy mid-century color palettes.	All (Worldwide)	Marty Segelbaum, MHS Licensing + Consulting
Jetty Home	Lifestyle brand by designer Emily Wood explores an array of everyday and seasonal designs while exemplifying a friendly, peaceful seaside attitude.		
Joy Studio	Art of J. Wecker Frisch offers a rich blend of past sentiment, visual memory and spiritual influence with a modern vintage edge.	All excl. fabric, calendars, mugs (Worldwide)	Jodi Beckett, Shamrock Licensing
Juichi Yoshikawa	Japanese calligrapher (sho artist) with avant garde trademark "three and a half dimensions" style and flamboyance; uses giant brushes and stadium-sized canvases.	All (Worldwide)	Takeshi Nakamura, Sony Creative Products (SCP)
Juventus FC	Italian football club founded in 1897, known for its black and white jerseys.	All (Russia, CIS)	Matteo Olivetti, Rainbow S.r.l.
KID-E-CATS	Animated children's series tells the story of three kittens who are forever ready to jump into action with endless enthusiasm, energy, and imagination.	All (CEE) All (Southeast Asia) All (Mexico, Chile) All (Iberia)	Hakan Durdag, European Licensing Co. (ELC) Hubert Co, EMC Empire Multimedia Corp. Jaime Hofman, Exim Licensing (Mexico) Ruben Gil, Enjoy Brand Licensing
KikoRiki	Russian animated series for kids 3–8 years-old features a wacky rabbit and his gang of animal pals having fun solving problems, sharing stories, and exploring their world.	All (China, Hong Kong, Macau, Taiwan)	Ivan Chan, Promotional Partners Worldwide (PPW)

*Extension or renewal.

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Licensing News *Continued from page 10*

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Little House on the Prairie	Publishing property rooted in the stories of a pioneer family and written by Laura Ingalls Wilder. Books have sold over 60 millions copies in 100 countries.	All (North America)	Carole Postal, Spotlight Licensing & Brand Management
Little Prince (The)	Children's book celebrates 75 years. Features a precocious boy who enchants a stranded pilot with his allegorical tales of traveling the universe. Over 200 million copies sold.	All (Worldwide)	Leslie Levine, Licensing Works!
Loralie Designs	Colorful, friendly art brand to bring on a smile and stir joy in the heart. Whimsical, yet sophisticated and always stylish, each design is infused with personality.	All excl. fabric/embroidery kits (Worldwide)	Jodi Beckett, Shamrock Licensing
Lovitude	Art brand by Anne Pryor about love and gratitude uses alcohol ink, her breath, and essential oils to create visual blessings said to elucidate, awaken, and activate souls.	All (Worldwide)	Marty Segelbaum, MHS Licensing + Consulting
Maggie & Bianca Fashion Friends	Live-action series about an ordinary American girl with a dream of becoming the world's greatest fashion designer and her friend, a self-proclaimed Italian princess.	All (Worldwide)	Cristiana Buzzelli, Rainbow S.r.l.
Monchhichi	Animated series inspired by titular cult toys of the 70's stars little monkeys that create children's dreams.	All (Italy)	Maurizio Distefano, Maurizio Distefano Licensing (MD Licensing)
Museum of Bad Art (MOBA)	Museum dedicated to bringing the worst of art to the widest of audiences; a worldwide fan base and 750+ images strong.	Apparel, greeting cards, home decor, novelties, publishing, stationery (Worldwide)	Cynthia Hall Domine, Synchronicity
National Geographic	Since its inception 130 years ago, the core purpose of NatGeo has been to further knowledge and awareness of our world.	Greeting cards, stationery, toys (U.S., Canada) Eco-friendly products, figures, playsets, toys (Worldwide)	Laura Takaragawa, National Geographic Partners
Odbods	Animated series follows the madcap antics of seven adorable, yet quirky, friends surviving the perils of everyday life with hilarious consequences.	All (U.S., Canada)	Jay Asher, Brandgenuity
Oi!	Book series brand by Kes Gray and Jim Field debuted in 2014; stars Oi Frog, Oi Dog, Oi Cat, and now Oi Goat in absurdly funny rhyming picture books.	All (Worldwide)	Sarah Fletcher, Maximum Licensing
Ollie & Moon Show (The)	Animated preschool series based on the best selling book series celebrates unusual friendships, curiosity, and appreciating the differences in all of us.	All (France)	Ignacio Segura de Lassaletta, Planeta Junior (Spain)
Peaky Blinders	U.K. drama series about gangsters from the lawless streets of post-war Birmingham on the cusp of the 1920's.	All (Worldwide)	Frances Adams, Endemol Shine Group U.K.
Photo Ark (The)	Multiyear effort to document every species living in zoos and wildlife sanctuaries led by photographer Joel Sartore; inspires action through education.	Gifts, housewares (Worldwide)	Laura Takaragawa, National Geographic Partners
Pikmi Pops	Toy brand based on scented tiny, cute animal characters housed in different sized lollipop shaped containers that come with a range of surprises.	All (U.K.)	Rob Corney, Bulldog Licensing
Regal Academy	Children's series takes the familiar world of fairy tales and turns it on its head with Rose Cinderella, a normal girl who suddenly finds herself in the world of Fairy Tales.	All (Worldwide)	Cristiana Buzzelli, Rainbow S.r.l.
Sign of the Apocalypse	Hilarious and thought-provoking observations, quotes, and realizations composed upon an "internally illuminated portable marquee" on author's front yard.	Apparel, barware, cocktail napkins, greeting cards, novelties (Worldwide)	Cynthia Hall Domine, Synchronicity
Stikbot	World's first social media sharing toy, easily posable figures that kids and adults can use to create stop motion videos.	Back-to-school (Worldwide)	James Slifer, Joester Loria Group (JLG)
Suzu's Zoo	Fifty year-old character art brand from award-winning artist Suzy Spafford. Features 200+ characters on a wide range of social expression products incl. greeting cards.	All (South Korea)	Ki Jong Park, SS Animent Inc.
Swan Princess (The)	Eighth full-length feature (The Swan Princess: A Royal MyZtery) continues the adventures of adventures of Princess Odette and Prince Derek.	All (Worldwide excl. some Asian territories)	Sondra Contino, Lawless Entertainment
Teletubbies	Preschool series focuses on four multi-coloured creatures named for the television screens implanted in their abdomens.	All (South Korea)	Dean Kim Seok-hyun, Joon Intl. Entertainment Co., Ltd.
That's not my...	Series of touch-and-feel board books aimed at babies and preschoolers by author Fiona Watt.	All (U.K.)	Vicky Hill, Bulldog Licensing
Timberlake Everyday	Collaboration between artist Bob Timberlake and designer Evanne Timberlake combines the tradition and quality of Timberlake with a feminine, casual perspective.	Accessories, furniture (indoor & outdoor), home textiles, wall decor (North America)	Robert Skotnicki, Global Licensing Inc.
Tiny Headed Kingdom	Plush character brand featuring six animal characters with large bodies and teeny tiny heads including a bear, lion, tiger, elephant, fox, and sloth.	All (Worldwide)	Travis J. Rutherford, Evolution USA
Tulipop	Icelandic character-based lifestyle brand inspired by ancient fairy tales; curious, cuddly, and gothic characters living on an enchanting island.	All (U.K.)	Sarah Fletcher, Maximum Licensing
UglyDolls	Series of plush toys from creators David Horvath and Sun-Min Kim. Each doll comes with a small tag describing the character's distinctive personality.	Accessories, apparel, gifts (EMEA excl. CEE & Nordics)	Peter Byrne, CPLG U.K. (Copyright Promotions Licensing Group)
Welch's	Food brand known for its grape juices, jams, and jellies made from dark Concord grapes as well as its white Niagara grape juice.	All (Europe)	Teri Niadna, Brandgenuity Europe
Winx Club	Animated series follows the adventures of a group of young fairies as they combine school life with battling against the forces of evil.	All (Worldwide)	Cristiana Buzzelli, Rainbow S.r.l.
Winx Club (live action)	Live action series based on the animated series, featuring six teenage fairies learning to hone their powers while living together in a magic boarding school.		

*Extension or renewal.

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Licensing News *Continued from page 11*

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Wright Brothers (The)	American aviators, engineers, inventors, and aviation pioneers who are credited with inventing, building, and flying the world's first successful airplane.	Bicycle accessories, bicycle equipment, bicycles, bikes (Worldwide)	Kenneth Botts, Wright Brothers U.S.A. (The)
Zig & Sharko	French animated series tells the story of an island-bound hyena, Zig, who plans to make a mermaid his lunch and Sharko, who comes to her rescue.	All (Italy)	Maurizio Distefano, Maurizio Distefano Licensing (MD Licensing)

International Licenses Recently Granted

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Animal Jam	DC Thomson	Magazines (U.K.)	Rockpool Licensing
Archie	Zynga*	Virtual slot machines (Worldwide)	King Features Syndicate
Ascot	Karen Millen	Apparel (Worldwide)	WME/IMG Worldwide Licensing d.b.a. Endeavor (U.K.)
Assassin's Creed	Paladone	Drinkware (U.K.)	Ubisoft Entertainment
Baby Blues	Lappan Verlag GmbH div. Carlson Verlag	Soft cover books (GAS)	King Features Syndicate
Beetle Bailey	Zynga	Virtual slot machines (Worldwide)	
Betty Boop	Bud Shop Co. Ltd.	Accessories, apparel, collectibles, stickers (Japan)	
	Grace Co., Ltd.	Accessories, apparel (Japan, China, Hong Kong)	
	JJ Vaillant Ltd.*	Figurines, lamps (U.K., Ireland)	
	Santex Moden GmbH	Apparel (women's) (GAS, UAE, CEMA, CIS)	
	SpaceAge Co. Ltd.	Accessories, bags, giftware, mobile phone cases, stickers (Japan)	
BFG (The)	Bloom and Blossom Ltd.	Bath products (children's), scented pillow spray (U.K.)	DRI Licensing Ltd.
Blondie (comic)	Zynga	Virtual slot machines (Worldwide)	King Features Syndicate
Bruce Lee	Diamond Select Toys & Collectibles	Collectible figures (Worldwide)	Bruce Lee Enterprises
Burtus	Magazine House Ltd.*	Magazines (Japan)	King Features Syndicate
Care Bears	Alice Vandy/Planet Vandy	Apparel (U.K.)	Bulldog Licensing
Chupa Chups	Griesson - de Beukelaer GmbH & Co. KG (GdB)	Refreshment sticks (Germany)	Perfetti Van Melle (PVM)/PVM Licensing
Corona	Earth Source Trading	Limes (North America)	Joester Loria Group (JLG)
Cozy Wingz	Jay at Play Intl.	Master toy (Worldwide)	ImaGENNation Group div. GennComm
Cuphead	Accutime Watch	Clocks, watches (Japan)	King Features Syndicate
Deer Little Forest	Smith Taylor	Chalkboards, clocks, homewares (U.K.)	Koko Rose Media
Disney	LILLEbaby	Baby carriers, doll carriers (U.S., Canada)	Disney Consumer Products
DOTS	Alice + Olivia	Clutches (Worldwide)	Synchronicity
Dragon Ball, Dragon Ball Super	Just Funky	Accessories, apparel, auto accessories, bedding, novelties (U.S., Canada)	FUNimation/Group 1200 Media
	Trends International	Calendars, posters, stationery, stickers (U.S., Canada)	
Dragon Ball Z	Just Funky	Accessories, apparel, auto accessories, bedding, novelties (U.S., Canada)	
Flash Gordon, Flash Gordon (1980 film)	Trademark Products Ltd.	Apparel, beanies, caps (U.K., Ireland)	King Features Syndicate
Flash Gordon	Zynga	Virtual slot machines (Worldwide)	King Features Syndicate
FlipaZoo	Good Stuff/Basic Fun div. The Bridge Direct	Amusement plush (U.S. (& territories), Canada, Australia, Europe, MENA)	Synchronicity
	Taste Beauty	Bath & body, lip balms (U.S. (& territories), Canada, Mexico, U.K.)	
Frida Kahlo	N16 Vintage	Apparel (U.K.)	Art Ask Agency
Garfield	Cotton On Group	Accessories, apparel, back-to-school, office products (Worldwide)	Global Licensing (NZ) Ltd.
	E-Patches & Crests	Embroidered patches, heat transfers, iron-on patches, patches (Worldwide)	JAM Brands
	Funko	Accessories, apparel, digital items, plush, pop vinyl figures (Worldwide)	King Features Syndicate
	Optimum d.o.o.	Art pads, cards, notebooks, stationery, stickers (Bosnia, Croatia, Hercegovina, Kosovo, Macedonia, Montenegro, Serbia, Slovenia)	JAM Brands
	StickerYou	Custom stickers, labels, temporary tattoos, wall decals (North America)	
Geronimo Stilton	Lindt & Sprungli S.p.A.	Chocolates (Italy)	Atlantyc Entertainment S.p.A.
Gigantosaurus	JAKKS Pacific	Master toy (Worldwide)	Cyber Group Studios
Gummibär	Seven 20 (Underground Toys)	Plush toys (U.S., Canada)	Sharpe Company (The)
Hagar the Horrible	Imaginarium Comercio	Novelty & gift items, travel accessories (Brazil)	King Features Syndicate
	Zynga	Virtual slot machines (Worldwide)	
Hatchimals	B.M. Fashion Ltd. t/a Fashion U.K.	Daywear (children's), swimwear (children's) (U.K.)	CPLG U.K. (Copyright Promotions Licensing Group)

*Extension or renewal.

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Licensing News *Continued from page 12*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Hatchimals	Corsair Toiletries	Cosmetics (children's), toiletries (children's) (U.K.)	CPLG U.K. (Copyright Promotions Licensing Group)
	MV Sports & Leisure	Bikes, protective accessories, scooters, skates (U.K.)	
	Sambro Intl.	Arts & crafts, bags, stationery (U.K.)	
	Unique Industries	Party paperware (U.K.)	
	Zak Designs U.K.	Dinnerware, drinkware, lunchware (U.K.)	
Iron Maiden	Stern Pinball	Pinball machines (Worldwide)	Global Merchandising Services
Jumanji: Welcome to the Jungle	Redbubble, Inc.	On-demand merchandise (Worldwide)	Sony Pictures Consumer Products
La-Z-Boy	Doskocil Manufacturing dba Petmate	Pet beds (U.S., Canada)	La-Z-Boy
LaurDIY	Mad Engine	Loungewear (U.S., Canada)	Brand Liaison (The)
Legend of Zelda	JAKKS Pacific*	Master toy (Worldwide)	Nintendo of America
Life is Strange	Titan Comics/Titan Entertainment	Comic books (U.K.)	Square Enix
Lovitude	Manual Woodworkers & Weavers (MWW)	Pillows, throws (Worldwide)	MHS Licensing + Consulting
Mario Kart	Hasbro	Board games (Worldwide)	Nintendo of America
Marley Kitchen	Chef'd	Meal kits (North America)	Hope Road Merchandising/Bob Marley Group of Companies
Marvel Avengers Infinity War	Zak Designs	Dinnerware, drinkware (U.S., Canada)	Disney Consumer Products
Match Attax	Centum Books	Publishing (incl. annuals) (U.K.)	Bulldog Licensing
	Cooneen	Nightwear, underwear (U.K.)	
	Sambro Intl.	Backpacks, bags, stationery, table football (U.K.)	
Miffy	B.M. Fashion Ltd. t/a Fashion U.K.	Daywear (girls'), nightwear, socks (U.K.)	DRi Licensing Ltd.
	Cooneen	Daywear, nightwear, socks (U.K.)	
	Global Licensing Ltd. div. Fashion U.K.	Apparel (girls'), nightwear, socks (U.K.)	
	Misirli U.K. Ltd.	Apparel (children's), nightwear (children's), socks (U.K.)	
	Paul Dennicci Ltd.	Cardigans, sleepwear (infants'), three-piece sets (U.K.)	
	Tobias & the Bear	Apparel (children's), apparel (infants') (U.K.)	
Miraculous: Tales of Ladybug & Cat Noir	H&A (Hall & Associates)	Bath products, cosmetics (children's), gift sets, hair care (U.K.)	Bulldog Licensing
	Sambro Intl.	Arts & crafts (U.K.)	
MLB	Loot Crate	Subscription service (Worldwide)	MLB Properties
MLS	Columbia Sportswear	Apparel, outerwear (North America)	Major League Soccer (MLS)
Molang	Poetic Brands Ltd./PoeticGem	T-shirts (U.K.)	Licensing Link Europe Ltd.
Mr. Men & Little Miss	Poetic Brands Ltd./PoeticGem	Apparel (adults') (U.K.)	Sanrio Global Ltd.
Narcos	Curve Digital	Video games (Worldwide)	Evolution USA
Nintendo	JAKKS Pacific*	Master toy (Worldwide)	Nintendo of America
Off-White	Sunglass Hut div. Luxottica Group	Eyewear (North America, U.K., ANZ, Asia)	Off-White c/o Virgil Abloh
Olive Oyl	Magazine House Ltd.*	Magazines (Japan)	King Features Syndicate
Orphan Black	Redbubble, Inc.	On-demand merchandise (Worldwide)	Boat Rocker Media
Peppa Pig	Alpha Group Co. Ltd. /Auldey Toys	Master toy (China)	Entertainment One (eOne) - Asia
Perry Ellis	Taesok Optical Co. Ltd.	Eyewear (South Korea)	Perry Ellis Intl./PEI Licensing
Phantom (The)	Billebeino Clothing & Accessories Oy	Apparel (Europe)	King Features Syndicate
	Curtin University	Digital signage, posters (Australia)	
	Zynga	Virtual slot machines (Worldwide)	
Popeye	Grace Co., Ltd.	Accessories, apparel (Japan, China)	
	Imaginarium Comercio	Novelty & gift items, travel accessories (Brazil)	
	Nowhere Co. Ltd./A Bathing Ape (BAPE)	Apparel, cushions, headwear, key rings, tote bags, wall clocks (U.S., U.K., GAS, Italy, UAE, Japan, China, Hong Kong, Taiwan, Singapore, Thailand, Netherlands, Norway)	
	Rubie's Masquerade Co. U.K. Ltd.*	Costume accessories, costumes (U.K., Ireland)	
Robot Wars	Demand Media Ltd.	Construction sets, gift sets, gifts (U.K.)	Licensing Link Europe Ltd.
Sally Forth	Zynga	Virtual slot machines (Worldwide)	King Features Syndicate
Sandlot (The)	Funko	Pop vinyl figures (U.S., Canada)	20th Century Fox Consumer Products
	New Era Cap	Caps (U.S., Canada)	
	Spencer Gifts/Spirit Halloween	T-shirts (U.S., Canada)	

*Extension or renewal.

Continued on page 14

Licensing News *Continued from page 13*

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Sign of the Apocalypse	Sellers Publishing	Day-to-day calendars (Worldwide)	Synchronicity
Simpsons (The)	Krispy Kreme Doughnuts	Doughnuts (Australia)	20th Century Fox Consumer Products
Smiley	Ami Paris *	Fashion accessories, fashion apparel (Worldwide)	Smiley Company (The)/SmileyWorld
So Awkward	Studio Press/Kings Road Publishing div. Bonnier Publishing U.K.	Books, scrapbooks (U.K.)	Channel X North Ltd.
Solo: A Star Wars Story	Funko	Bobbleheads, pop vinyl figures (Worldwide)	Disney Consumer Products
	Hasbro	Collectible figures (Worldwide)	
	JAKKS Pacific	Figures (Worldwide)	
	LEGO Systems	Figures & play sets (Worldwide)	
	Mattel	Toy cars (Worldwide)	
Spartan Race	Craft Sportswear North America	Performance apparel, performance athletic footwear (Worldwide)	Spartan Race Inc.
Stikbot	Franco Manufacturing/Franco MFG	Bath accessories, beach towels, bedding, decor (North America)	Joester Loria Group (JLG)
Sugar Babies	Alice + Olivia	Clutches (Worldwide)	Synchronicity
Super Mario	JAKKS Pacific*	Master toy (Worldwide)	Nintendo of America
Terminator	Dark Horse Comics	Comics (U.S., Canada)	Creative Licensing Corp.
That's not my...	Paul Dennicci Ltd.	Apparel (infants') (U.K.)	Bulldog Licensing
Tootsie Roll Brands	Christopher Radko/Rauch Industries	Limited edition Christmas ornaments (U.S., Canada)	Synchronicity
	Playtek div. European Home Designs	Bubbles, pool toys (U.S., Canada, U.K.)	
Volkswagen	Kinnerton Confectionery	Chocolate (U.K.)	WME/IMG Worldwide Licensing d.b.a. Endeavor (U.K.)
Winnie the Pooh	Petunia Pickle Bottom div. Barbaras Development Inc Co.	Baby accessories, diaper bags (North America)	Disney Consumer Products
Zits	Lappan Verlag GmbH div. Carlson Verlag	Soft cover books (GAS)	King Features Syndicate

*Extension or renewal.



contacts & connections

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international contacts & connections

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Average Royalty Edges Up 0.5%

Continued from page 1

Thanks to that sustained rise, entertainment/character brands overtook sports and collegiate properties for the first time with an average royalty rate of 10.14% in 2017. Despite slipping by -0.2%, the sub-category of entertainers/models enjoyed the largest average royalty rate at 10.38%, followed by its parent property type, celebrities.

On the product category side, licensed apparel had the greatest swing in royalties and grew by 1.5% to reach an average 9.66% rate. That placed apparel as the sixth-biggest royalty rate—toys/games merchandise continues to demand the biggest share at 10.54%, followed closely by video games/software at 10.53%.

AVERAGE INDUSTRY-WIDE ROYALTY, BY PROPERTY TYPE, U.S./CANADA, 2016–2017				
PROPERTY TYPE	AVERAGE ROYALTY, 2017	AVERAGE ROYALTY, 2016	CHANGE, 2016–2017	RANGE OF ROYALTIES, 2017
Art	6.14%	6.17%	-0.5%	4–12%
<i>Art and Artists</i>	6.13%	6.19%	-1.0%	4–12%
<i>Museums</i>	6.06%	6.09%	-0.5%	4–15%
Celebrities	10.24%	10.26%	-0.2%	3–18%
<i>Entertainers/Models</i>	10.38%	10.43%	-0.5%	4–16%
<i>Chefs/Home-related</i>	9.64%	9.69%	-0.5%	2–17%
Collegiate	10.02%	10.01%	0.1%	5–19%
Entertainment/Character	10.14%	9.99%	1.5%	5–21%
Estates	9.65%	9.62%	0.3%	4–18%
Fashion	8.44%	8.45%	-0.1%	2–17%
<i>Apparel</i>	8.38%	8.38%	0.0%	5–17%
<i>Footwear</i>	7.13%	7.13%	0.0%	2–14%
<i>Home</i>	7.50%	7.49%	0.2%	2–14%
Music	8.14%	8.18%	-0.5%	4–19%
Non-profit	8.24%	8.26%	-0.2%	4–14%
Publishing	8.48%	8.48%	0.0%	2–18%
<i>Books</i>	7.94%	7.93%	0.1%	6–14%
<i>Newspapers/Magazines</i>	8.16%	8.16%	0.1%	2–12%
<i>Comic Books/Strips</i>	9.55%	9.56%	-0.1%	5–18%
Sports	10.07%	10.04%	0.3%	5–18%
Trademarks/Brands	7.76%	7.74%	0.3%	1–16%
<i>Automotive/Motor Vehicle</i>	4.06%	4.06%	0.0%	1–16%
<i>Food/Beverage</i>	5.58%	5.57%	0.3%	1–10%
<i>Restaurants</i>	5.92%	5.91%	0.1%	4–8%
<i>Sporting Goods</i>	7.00%	7.00%	0.0%	6–14%
Traditional Toys/Games	8.17%	8.16%	0.1%	5–12%
Videogames/Interactive/Online	9.01%	8.96%	0.5%	6–15%
Overall Average	8.79%	8.75%	0.5%	1–21%

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

SOURCE: THE LICENSING LETTER

AVERAGE INDUSTRY-WIDE ROYALTY, BY PRODUCT CATEGORY, U.S./CANADA, 2016–2017				
PRODUCT CATEGORY	AVERAGE ROYALTY, 2017	AVERAGE ROYALTY, 2016	CHANGE 2016–2017	RANGE OF ROYALTIES, 2017
Accessories	9.05%	9.05%	0.0%	3–18%
<i>Eyewear</i>	8.23%	8.26%	-0.3%	5–16%
<i>Handbags, Backpacks, Messenger Bags</i>	8.88%	8.88%	0.1%	5–18%
<i>Headwear</i>	9.86%	9.85%	0.1%	7–14%
<i>Hosiery</i>	8.57%	8.58%	-0.1%	5–14%
<i>Jewelry and Watches</i>	7.72%	7.72%	0.1%	3–18%
<i>Luggage and Travel Accessories</i>	10.05%	10.07%	-0.2%	5–18%
<i>Scarves and Ties</i>	7.32%	7.33%	-0.1%	5–14%
Apparel	9.66%	9.52%	1.5%	5–19%
Consumer Electronics	5.26%	5.25%	0.1%	3–10%
Domestics	8.92%	8.88%	0.5%	4–14%
Food/Beverages	5.99%	5.98%	0.1%	1–12%
Footwear	8.09%	8.10%	-0.1%	3–16%
Furniture/Home Furnishings	7.55%	7.53%	0.3%	3–14%
Gifts/Novelties	8.66%	8.65%	0.2%	4–16%
HBA	8.99%	8.99%	0.0%	5–15%
<i>Franchise</i>	9.25%	9.27%	-0.2%	5–18%
<i>Cosmetics, Hair Accessories, Other</i>	8.44%	8.44%	0.0%	6–14%
Housewares	6.32%	6.29%	0.4%	3–14%
Infant Products	8.58%	8.61%	-0.3%	5–14%
Publishing	9.63%	9.64%	-0.1%	5–15%
Sporting Goods	9.76%	9.79%	-0.3%	4–15%
Stationery/Paper	8.81%	8.86%	-0.5%	4–12%
Toys/Games	10.54%	10.49%	0.5%	5–21%
Videogames/Software	10.53%	10.51%	0.2%	1–20%
Overall Average	8.79%	8.75%	0.5%	1–21%

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

SOURCE: THE LICENSING LETTER

EXPERIENTIAL

Theme Parks, Touring Shows & Live Events

Mattel's American Girl is going live in a partnership with **Mills Entertainment**. The new musical production, inspired by the popular American Girl characters and their stories, kicks-off its nationwide tour Fall 2018.

Universal Brand Development and **Film Concerts Live!** launch *Jurassic World in Concert*; the world premiere features the National Symphony Orchestra performing the complete Jurassic World score live as the 2015 movie is projected in HD onto a massive screen. The opening night will take place on May 30 with a special concert at the Kennedy Center in Washington D.C. This is a follow-up to the currently touring *Jurassic Park in Concert*, which has been presented by more than 50 orchestras to date in cities including London, Paris, Melbourne, Toronto, Taipei, and Philadelphia.

Six Flags Entertainment, Riverside Investment Group, and Turner Asia Pacific partner to bring original, branded experiences to Six Flags parks throughout China. The first additions are new Tuzki-branded rides at Six Flags Zhejiang and Six Flags Chongqing, scheduled to open in 2019 and 2020, respectively. In addition to the new ride, both parks will also feature Tuzki theming and new retail locations offering branded merchandise. Turner-owned Tuzki

is a rabbit emoticon who also has his own themed restaurant and café in addition to being the star of an animated series and an upcoming theatrical movie.

The agreement between Turner and Riverside Investment Group also allows for other Cartoon Network IP to be featured inside Six Flags Kids World—the first park of its kind designed specially for families with young children—which will be built adjacent to both Six Flags Zhejiang and Six Flags Chongqing.

Disney is expanding the presence of Marvel superhero properties at its parks, including Disneyland Resort in Anaheim, Disneyland Paris, and Hong Kong Disneyland. In California, it's anticipated that *Spider-Man* and the *Avengers* characters will take over space previously occupied by a now-closed land inspired by the Pixar property *A Bug's Life*. France will see an *Iron Man* and *The Avengers* ride in 2020, while an *Ant-Man* and *The Wasp* attraction is headed to Hong Kong.

In the U.K., **Merlin Entertainments** is investing nearly £30 million (\$42 million) in revamping and developing new Midlands attractions. Specifically, the company is investing in *The Bear Grylls Adventure* and a *Legoland Discovery Centre*.

INDUSTRY WATCH

Over 95% of Companies Generate Under \$10 Million in Licensed Retail Sales Annually

In the last six months, we began asking *Licensing Source Book* listees two additional questions: How much licensed retail sales of licensed merchandise is your company responsible for? And, how many employees at your company are involved at least part-time in licensing? We break down the findings below.

Almost 5% of over 11,000 total listees answered at least one of these questions. We counted responses from every property type and product category we track, although not enough, in some cases, to report statistically significant trends between narrower categories. Approximately 75% of respondents are based in the U.S., and 25% elsewhere. Respondents had the option to confidentially report either or both of these figures, which will be made available in the *Licensing Source Book* later this year. We may release these figures in different metrics than reported below.

It's a Small World After All

Surprisingly, there are many smaller players reporting under \$500,000 in annual licensed retail sales worldwide—just under 18% of respondents. Over three-fourths are either licensors or agents. Eighty-five percent count less than 3 employees (a majority of those are one-person

AS EXPECTED, ROUGHLY 60% OF RESPONDENT-COMPANIES GENERATED OVER \$3 MILLION IN LICENSED RETAIL SALES ANNUALLY

operations). They own, represent, or license an average of 6.3 and a median of 2.5 properties. While this cohort is broadly represented, it is more likely that members are licensors who work with art, character, or publishing brands.

Just over 20% of listees reported generating anywhere from \$500,000 to \$3 million in licensed retail sales. Licensees were more likely to fall into this category than any other at over 40% of respondents within this cohort—agents and licensors were equally split. This group owns, represents, or licenses an average of 7 and a median of 4 properties. While it's usually a poor indicator of financial success on its own, it is true that companies reporting higher retail sales tend to manage more properties—it is the lucky outlier that can generate even \$1 million in licensed retail sales with only one license.

Continued on page 23

As expected, roughly 60% of respondent-companies generated over \$3 million in licensed retail sales annually. Roughly one-third of each company type (licensor, licensee, and agent) fall into this group, with just 2% of responses from other executives in consulting, retail, and other services. This group owns, represents, or licenses an average of 13.8 and a median of 8 properties.

But of the \$3 million-plus group, over 90% had under \$10 million in retail sales. Just over 1% of companies in the licensing industry at large are responsible for at least \$250 million in licensed retail sales a year.

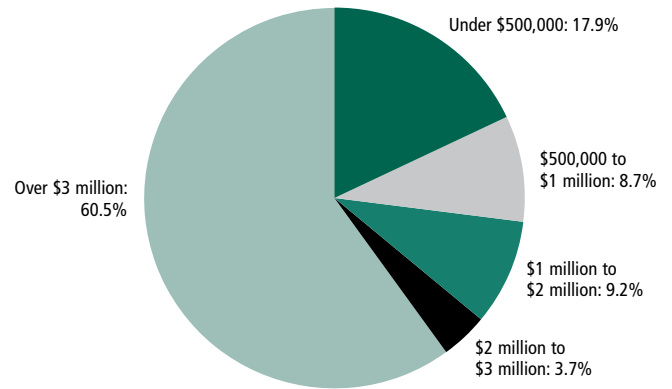
Note that the figures may be skewed because we did not ask for specific retail sales figures above \$3 million—all of those figures are purely self-reported. *TLL's* review of a representative sampling of those companies that reported simply “over \$3 million” in licensed retail sales, however, showed that the majority are relatively smaller firms with sales under \$50 million.

A more conservative adjustment would pin the number of companies worldwide generating under \$10 million in licensed retail sales at approximately 80%, and at the very least over 65%, of all companies listed in the *Source Book*.

Slightly over 70% of companies count under 10 employees who are tasked with licensing-related tasks at least part-time. Roughly 35% of all companies have 1–3 or 4–9 such people on staff. Just 30% have over 10 licensing-related employees.

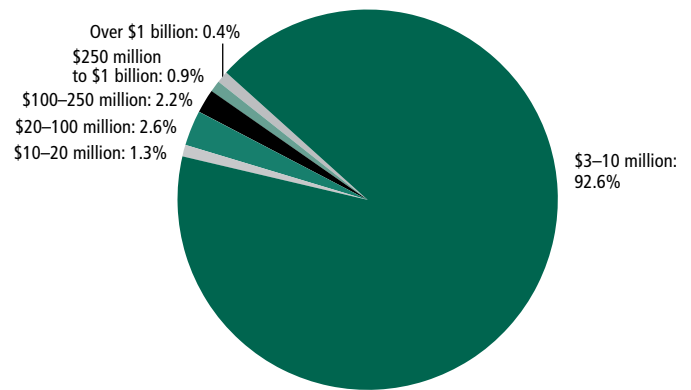
These numbers line up with the most recent results of the *Licensing Compensation Report*, which counts only full-time employees directly involved in licensing. In 2016, over 60% of companies boasted 1–5 employees, 21% had 6–20 heads, and just 10% of respondents reported 101 or more.

SHARE OF LICENSING COMPANIES, BY LICENSED RETAIL SALES, 2018



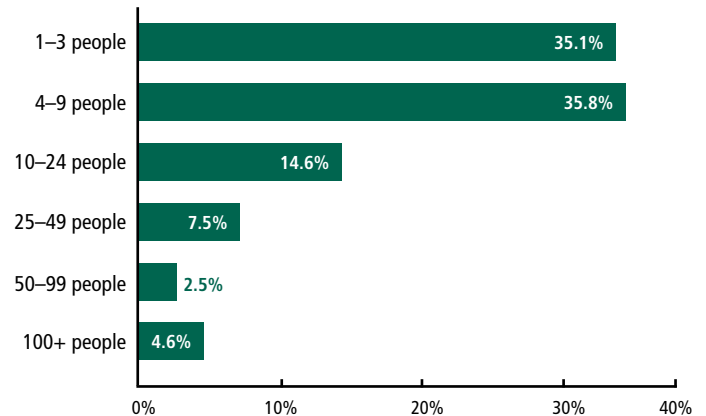
SOURCE: THE LICENSING LETTER

SHARE OF LICENSING COMPANIES WITH OVER \$3 MILLION IN LICENSED RETAIL SALES, 2018



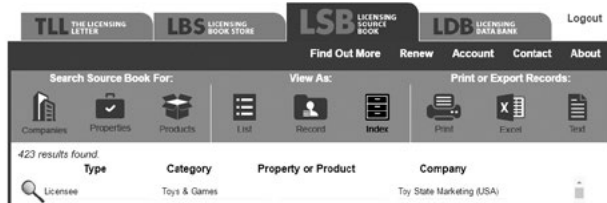
SOURCE: THE LICENSING LETTER

SHARE OF LICENSING COMPANIES, BY HEADCOUNT OF EMPLOYEES DIRECTLY INVOLVED IN LICENSING AT LEAST PART-TIME, 2018



SOURCE: The Licensing Letter Source Book

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BUSINESS

Roundup: Need-to-Know M&A & Bankruptcy

The New England Confectionery Co. (**Necco**) is facing the possibility of mass layoffs if the troubled candy maker fails to find a buyer by May 6. The company manufactures the classic Necco Wafers, Mighty Malts, Candy Buttons, and Sweethearts. Last year Necco sold its 810,000 sq. ft. building for almost \$55 million in a deal that had the new owners cover up to \$3 billion in unpaid taxes and water bills.

Fashion Brands Redistribute Ownership

Nine West Holdings files for bankruptcy, listing debts of approximately \$1.5 million. The apparel, jewelry, and jeans-wear company is planning to sell its flagship brand, Nine West, to **Authentic Brands Group**. It will also sell its Bandolino brand to an unannounced party. The company plans to reorganize around its other businesses such as Anne Klein.

Separately, **Authentic Brands Group** (ABG) definitively agrees to purchase the American lifestyle brand Nautica from **VF Corp.** This is ABG's largest brand acquisition to date, and will propel its portfolio to nearly \$7 billion in global retail sales—with the ultimate goal of achieving \$10 billion in global retail sales worldwide by 2020. Nautica boasts over \$1.2 billion in annual retail sales through 5,000-plus global points of sale, including 270 freestanding stores, and counts over 40 licensing partners globally.

ABG will take on Nautica's brand marketing and licensing functions. Other aspects of the operation will move into **Aero OpCo**, the operating partner for **Aéropostale**. Aero OpCo will assume the role of Nautica's core licensee and operating partner, managing the brand's wholesale, 70-plus U.S. retail stores, ecommerce, product development, and other functions.

Overseas, ABG Shanghai broke ground last month with other locations slated to open in London, Mexico City, and Los Angeles through 2018.

Stella McCartney will buy out the remaining 50% share of her company owned by luxury giant **Kering**, *Reuters* reports. The move ends a 17-year partnership that will formally cease in Q1 2019; Kering will continue to lend some support and services to the brand in the meantime. McCartney will stay on as a board member of the Kering Foundation, which works to stop violence against women, and will continue to collaborate with Kering in the field of "sustainable fashion."

Separately, **Kering** is preparing to spin off German sportswear label **Puma** to its own shareholders as it focuses on its high-margin luxury brands, such as Gucci and Balenciaga, and builds up those with a high growth potential.

International: Sports Retailers

Columbia Sportswear Co. plans to acquire the remaining 40% share in the Chinese venture it operates jointly

with **Swire Resources Ltd.**, Columbia Sportswear Commercial (Shanghai) Co. The venture generated \$168 million in sales in 2017; it operates 86 retail store locations and distributes through ecommerce as well as over 750 other retail locations. The two are expected to work together in Hong Kong and Macau going forward.

English sports chain **JD Sports** buys **The Finish Line** for \$558 million in a bid to enter the U.S. market. JD's recent acquisitions include Sports Zone, in Europe, which gave it a bigger position in Iberia. JD operates over 1,200 stores throughout Europe, generating \$3.17 billion in revenues for 2017. The retailer is majority owned by **Pentland Group**, a brand management firm with stakes in brands such as Lacoste, Speedo, and Ted Baker footwear. Although Finish Line boasts more than 900 retail stores and brand locations, including an e-commerce site, the chain has been closing scores of stores since at least 2016. Principal executives are expected to remain, but there is no word on further stores closures or takeovers.

Housewares

Cookware manufacturer **Regal Ware** acquires **Espro**, a company known for its premium coffee and tea presses. The Espro coffee line will become a new division of RegalWare and join the Saladmaster, Kitchen Fair, and Lifetime cookware brands.

Bon-Ton is being liquidated following a successful bid by a joint venture composed of the holders of the company's lien notes, Great American Group, and Tiger Capital Group. The retailer filed for Chapter 11 in February and was hopeful to emerge under a financial restructuring plan. Bon-Ton operates approximately 260 stores in 24 states in the Northeast and Midwest. Its stores, e-commerce and mobile platforms under the Bon-Ton, Bergner's, Boston Store, Carson's, Elder-Beerman, Herberger's, and Younkers names will remain open throughout the store closing sales.

Dufresne Spencer Group (**DSG**) invests in **Hill Country Holdings** in a deal that allies the companies with more than **Ashley HomeStore**-branded 70 stores across the country. Late last year, Ashley Global Retail invested in DSG, its largest HomeStore licensee. The deal means that Ashley is now a part-owner in two of its largest licensees. According to *Furniture Today*, DSG generated \$296.8 million in retail sales (at 41 stores) and Hill Country \$292.6 million (30 locations) in 2016.

Publishing

Adaptive Studios acquires the **Zane Grey** literary estate. The media venture plans to revive the classic western novelist's works and brand by developing film, TV, and publishing projects. The Grey estate includes about 133 novels, including several books written by Grey's son

and grandson. Adaptive will own and manage all rights related to Grey's name and likeness.

Octopus Publishing Group and **Tate Publishing** enter a licensing agreement in which Octopus will create a licensed publishing program focusing on Tate's practical art and photography books. Octopus will launch their Tate-branded list in Spring 2019 under the Ilex imprint, publishing approximately eight books a year.

Designer Greetings buys Seattle-based publisher **Madison Park Greetings**, marking the greeting card company's eighth acquisition since 2006. Recent purchases include Card\$mart, Glitterwrap, Red Farm Studio, Royal Greetings, enGreet, Treasure Greetings, and Mike's Distributing.

Toycos Consolidate, Revamp Business

Asmodee U.K. purchases games distributor **Coiled-spring Games**. Coiledspring will join the Asmodee Group of games companies across the world, but will continue to operate as a separate entity.

Basic Fun! (Uncle Milton, K'NEX and CakePop Cuties) acquires **Geoworld's** toy manufacturing business and its related brand Dr. Steve Hunters, which will become part of the company's STEM business. Geoworld is an authentic line of excavation and discovery toys, including paleontology and geology sets, developed by a geo-paleontologist.

Jakks Pacific appoints a new EVP and CFO, Brent Novak. After a 13% drop in net sales last year to reach \$613.1 million, the toyco is planning to expand its retail private label programs and exclusive product initiatives. There will also be a continued focus on skincare and cosmetics through **C'est Moi**, Jakks' proprietary cosmetic brand for tweens. The company's expectation for 2018 is to grow sales modestly and return to profitability.

Tobar' buys out **H Grossman**, Scotland's largest toyco, which will continue to operate in its native home of Glasgow with Martin Grossman as Managing Director.

Mattel begins closing its New York office as part of a previously announced \$650 million cost saving plan. The process will affect approximately 100 employees, who will be either relocated or made redundant, and is expected to complete by the end of the year.

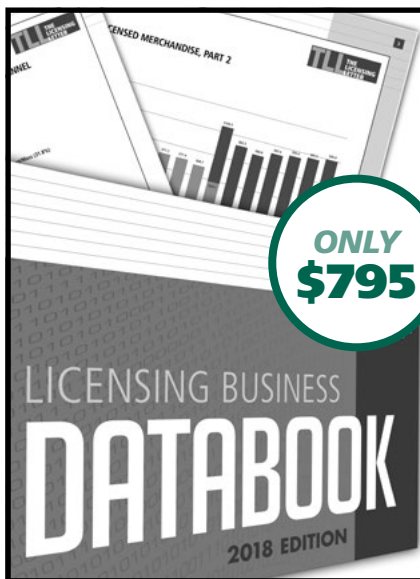
VIDEO GAMES

Ready, Player, One Step Closer to China

Ubisoft will not be taken over by **Vivendi**, the French media conglomerate and former owner of Activision-Blizzard (that company spent \$5.83 billion to gain its independence in 2013). Ubisoft bought out Vivendi's 27.3% stake in a deal valued at \$2.45 billion, or twice what Vivendi paid originally, with the help of **Tencent** (acquiring 5% of capital) and the Ontario Teacher's Pension Plan (3.4% of capital).

Separately, Ubisoft and Tencent strike a deal where Tencent will operate, publish, and promote several of Ubisoft's PC and mobile titles in the Chinese market. It's an opportunity for Ubisoft to reach an estimated 500 million players in the country through one of the largest, most active social networks in the world.

Tencent already has a significant footprint in the Western market—it owns *League of Legends* developer Riot Games, a sizable chunk of *Fortnite* developer and Unreal Engine developer Epic Games, the Chinese publishing rights to *PUBG*, and a controlling stake in *Clash of Clans* maker Supercell (84.3% stake acquired for \$8.6 billion in 2016). However, Tencent has agreed not to increase its share ownership or voting rights in Ubisoft.



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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**.

After just 14 months at the helm, Mattel CEO **Margo Georgiadis** is out. The technology executive, hired from Google, joined the toyco at a troubled time and led efforts to modernize at cut costs. Georgiadis will serve in an advisory role at Mattel until May 10, after which she will take over as CEO of genealogy website Ancestry.com. Board member **Ynon Kreiz** will take over as CEO effective April 26th and will become chairman of the board after his election at an annual shareholders' meeting slated for May 17. Kreiz formerly led Maker Studios and Endemol Group; he plans to make more use of iconic Mattel IP such as American Girl and Fisher-Price.

At Universal's Games and Digital Platforms business, **Joseph Kim** is now SVP Publishing, Worldwide Games & Digital Platforms, Universal Brand Development. Kim reports to **Chris Heatherly**, EVP Worldwide Games & Digital Platforms; he will oversee slate and product management, marketing, user acquisition, and revenue optimization across all games and apps.

DHX Media co-founder, **Steven DeNure**, will be transitioning out of his role as President & COO. **Josh Scherba** is promoted to President; **Anne Loi** to the newly created role of CCO; and **Aaron Ames** to COO. Scherba will oversee DHX's content business as well as its YouTube-based kids' network, WildBrain. Loi will oversee key external partnerships, content production and financing, and business analytics.

Paramount Animation ups **Ramsey Naito** to EVP, reporting to President **Mireille Soria**. She will lead production on the next *SpongeBob SquarePants* movie. Paramount has also hires **Emily Nordwind** as VP Production & Development, **Katherine MacDonald** as VP Production & Marketing, and **Maya Kambe** as a Creative Executive.

DC Entertainment and Warner Bros. Consumer Products President **Diane Nelson** is taking a leave of absence. As Nelson takes some time to recharge after 22 years at the company, the DC executive management team—**Dan Didio** (Co-Publisher), **Jim Lee** (Co-Publisher), **Geoff Johns** (President & CCO), and **Amit Desai** (EVP Business & Marketing Strategy)—will report to **Thomas Gewecke**, Warner Bros. Entertainment Chief Digital Officer & EVP Strategy/Business Development. Warner Bros. Consumer Products' **Pam Lifford** will report to Warner Bros. Entertainment CEO **Kevin Tsujihara** directly.

Patty Hirsch is named SVP & General Manager of Warner Bros. Digital Labs, the technology team that powers WB's portfolio of digital content services including Machinima, Ellen DeGeneres' Ellen Digital Ventures, and DramaFever (which she personally oversees as CEO).

Endemol Shine Group restructures its brand licensing division. **Owain Walbyoff** will add the group's licensing division to his remit in a new broader role as MD Gaming, Licensing & Merchandising. He takes over from **Frances Adams**, who joins Endemol Shine's creative networks division as Group Director Brand Strategy. **Jane Smith** is promoted to Director Brand Licensing & Strategy. The broader group brand licensing team has also been restructured under clearer category divisions to further grow expertise within each area and drive the commercial performances of its brands.

NASCAR promotes several leaders in marketing and media operations, including **Jill Gregory** to EVP & CMO, **Pete Jung** to VP Brand Marketing, and **Brian Herbst** to VP Global Media Strategy & Distribution.

FremantleMedia North America CEO **Cecile Frot-Coutaz** leaves the company. She will join YouTube to lead EMEA operations. Frot-Coutaz reportedly has a 12-month notice clause, and Fremantle owner RTL Group is searching for a successor. Separately, the prodco hires **Kevin Blanchette** as SVP Marketing & Communications.

Turner Asia Pacific appoints **Vikram Sharma** VP Cartoon Network Enterprises to head its regional licensing and merchandising division. Sharma will drive sales across the APAC region for its branded toys, apparel, home entertainment, publishing, and lifestyle products as well as live events and themed entertainment. In addition to Cartoon Network properties, Sharma also oversees the management of Tuzki (Turner represents Warner Bros. Consumer Products in South Asia). EMEA President **Giorgio Stock**, who also spearheads Cartoon Network Enterprises for Turner internationally, will work closely with the Asia Pacific team going forward.

Stateside, Turner's Cartoon Network promotes **Vishnu Athreya** to SVP Programming.

Fullscreen names **Mary Murcko** SVP Partnerships & Revenue.

Parentco Tapestry appoints former Ferragamo chief **Eraldo Poletto** as Stuart Weitzman's new CEO & Brand President. **Wendy Kahn**, the label's head, leaves Tapestry after less than two years in the role.

Ricardo Yoselevitz joins Feld Entertainment as VP Global Partnerships.

Comic publishing executive **Sven Larsen** is returning to Marvel Entertainment as Director Licensed Publishing.

Sam Schutz joins LBYR as Publishing Director Brand, Licensed, & Tie-in Publishing. Schulz was formerly the Associate Publisher Licensing at Scholastic.

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Who's News, Cont'd.

Mel Caylo joins Valiant Entertainment as Director Marketing. Carlo replaces **Hunter Gorinson** to work with the executive, sales, and editorial teams to plan, execute, and oversee all aspects of public relations and marketing. **Karl Bollers** is also hired as Editor.

Jakks Pacific appoints **Brent Novak** as its new EVP & CFO, where he will oversee all financial aspects of the company and report directly to Chairman & CEO **Stephen Berman**.

Sesame Workshop promotes **Michael H. Levine** to the newly created position of Chief Knowledge Officer.

Hasbro promotes **Foye Pascoe** to President European Sales & Marketing. She replaces **Mark Hoijtink**, who has left after 11 years in order to pursue new opportunities.

Lori Burke joins joining Clarkson Potter as Executive Director Licensing & Strategic Publishing Partnerships. Burke was formerly an executive director for license acquisitions and media at Penguin Young Readers.

HBC hires **Bari Harlam** as its new CMO. She succeeds **Milton Pappas**, who leaves the company.

Global Head of ReedPOP, **Lance Fensterman**, is promoted to President of the division.

As Basic Fun! takes over day-to-day management of recent acquisition Geoworld, Founder & President **Stefano Piccini** retains an active role in assisting the transition and growing the new parentco's STEM business.

Penguin Random House names **Madeline McIntosh** to the newly created position CEO of PRH U.S. and promotes **Allison Dobson** to President of Penguin Publishing Group, succeeding McIntosh in that role.

Christopher Mooney joins Welspun in the newly created position of CMO & Chief Merchandising Officer for the U.S.

Former DreamWorks Animation and American Girl executive **Shawn Dennis** joins GoldieBlox as President to oversee expanded revenue, entertainment, consumer product, and strategic partnerships. Dennis will work with CEO & Founder **Debbie Sterling**, and will continue to serve on the company's board of directors.

French silver specialist Christofle appoints luxury expert **Nathalie Remy** as its new CEO, succeeding Olivier Fremont. **Nicholas Krafft** remains in charge of the U.S. division.

Genius Brands appoints **Cindy Elfenbein** to the newly formed position of VP Global Consumer Products & Retail Development, reporting to SVP Global Consumer Products, **Lloyd Mintz**.

Separately, **Michael Jaffa** joins Genius Brands' General Counsel as SVP Business Affairs.

Asmodee Group taps **Andy Jones** to run its new division, Asmodee Entertainment. Jones is joined by **Darren Kyman**, who is hired as SVP Business Development.

LIMA France will be led by **Laurent Taieb** as Chairman. Taieb is supported by vice chairs **Marina Narishkin**, Director of TF1 Licences; **Marie-Laure Marchand**, SVP Global Consumer Products at Xilam; and **Jerome Le Grand**, General Manager Licensing, Retail & E-commerce at The Walt Disney Company France. **Valérie Rolandez-Barríos**, Director Licences & Partnerships at StudioCanal, will serve as treasurer. Over 25 companies have joined LIMA France to date.

Posh Paws Managing Director **David Martin** departs effective immediately. Owner **Phil Setter** confirms that his role will be covered by the existing management team until a replacement is named.

Ian Topping is set to leave HMV later this year after five years at the helm; he will be replaced by retail director **Neil Taylor** during a 6-month transition period. The retailer also appointed **Patrizia Leighton** as Marketing Director and **Rudy Osorio** as Commercial Director.

Tim Rothwell joins the ConversionPoint Technologies advisory board.

The Slovenian-based legacy supplier of handcrafted skis, Elan Skis, forms Elan Sports USA, an independent subsidiary of Elan d.o.o., under the leadership of **Gary Fleming** as President.

The Kids & Global Networks division of Blue Ant Media hires **Chiara McKee** as VP EMEA. Based in London, she reports directly to Kids & Global Networks CEO **Ward Platt**.

Continued on page 28

Who's News, Cont'd.

After buying French luxury brand Lanvin last month, Chinese conglomerate Fosun Intl. ousts Creative Director **Olivier Lapidus** and General Manager **Nicolas Druz. Joann Cheng**, President of Fosun Fashion Group and chairman of the board of directors of Lanvin, is temporarily appointed CEO. Druz takes up the new position of Managing Director of Fosun Fashion Group, where he will support the group's business expansion in Europe.

Ken Wright is appointed to the newly-created position of President & Publisher of Viking Children's Books and Philomel Books following the departure of **Michael Green** earlier this month.

Simon Belsham is named President of Jet.com, reporting to **Marc Lore**, President & CEO of Walmart E-commerce U.S. Current Jet leaders **Andrew Gasper** (General Manager), **David Echegoyen** (Chief Customer Officer), **Jack Hanlon** (customer analytics and insights), **Jeff Saunders** (head Jet Tech) will continue in their current roles.

Emily Clement is promoted to Executive Editor for Harry Potter Wizarding World & Special Projects, from rights and co-editions manager, at Scholastic.

Lowe's seeks a new CEO as current Chairman, President & CEO **Robert Niblock** plans to retire after 25 years. Niblock will continue to serve until a successor is found.

France's Cyber Group Studios appoints **Loic de Boudemange** as its new VP Digital Development & Operations.

Activision Blizzard fills out its esports management team, adding **Brandon Snow** as Chief Revenue Officer (former NBA SVP Team Marketing & Business Operations); **Daniel Cherry** as CMO (NJ Devils, Prudential Center CMO & Chief Innovation Officer); and **Marc Kolin** as VP/Finance & Strategy (NBCU VP Revenue Analytics & Strategy).

Banijay Group's **Marcus Wolter** will become CEO of the newly created Banijay Germany, effective August 2018. In his new role, Wolter will oversee all operations in Germany including Brainpool and Banijay Productions Germany. Formerly Endemol Shine's Chairman Northern Europe & CEO Germany, Wolter will also become a shareholder of the group in Germany.

Kohl's Chief Administrative Officer, **Richard Schepp**, will leave the company as of Sept. 29th.

David Campisi, who has been on temporary medical leave, retires from Big Lots as President & CEO. The company is seeking a permanent successor; in the meantime, CEO responsibilities are being handled by **Lisa Bachmann**, EVP/Chief Merchandising & Operating Officer, and **Timothy Johnson**, EVP/Chief Administrative & Financial Officer.

Toys 'R' Us founder **Charles Lazarus** dies at 94.



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