

# TLL THE LICENSING LETTER

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## Licensed Fashion Sales Up 3.5% WW in 2017

Worldwide retail sales of licensed merchandise based on fashion properties grew 3.0% to reach \$41,584 million in 2017, per *TLL's Annual Licensing Business Survey*.

While the U.S./Canada makes up the largest share of worldwide licensed sales at 52.4% share, the fastest-growing territories are the Middle East & Africa (12% growth in 2017) and Asia (8%). In fact, every other territory *TLL* tracks outpaced the tepid 1.5% growth observed in the U.S./Canada. Europe grew 3%, Latin American sales grew 2.4%, and Australia/New Zealand 2.1% in 2017.

On the global scale, the only property type whose growth outpaced that of fashion brands was entertainment/character at 3.2%. Fashion is the largest property type by retail sales worldwide with \$41.6 billion, or 24.1% share. It is followed by corporate trademarks/brands (\$36.8 billion) and entertainment/character (\$31.1 billion).

### Retail Sales in the U.S./Canada

Within the U.S./Canada, apparel brands make up 84.9% of all fashion-based sales. In 2017, retail sales based on apparel grew 1.2% or \$218 million. The smaller home sub-category, in comparison, grew 6.4% and footwear brands grew 2.5% compared to the previous year.

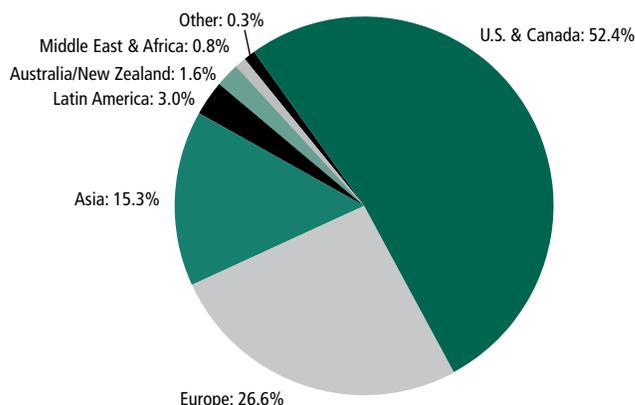
The biggest driver of fashion brand-based growth domestically is licensed apparel. The product category grew 2.6% in 2017, adding \$188 million in retail sales. The second-largest contributor was accessories, which overall grew 1.3%, or by \$103 million in sales.

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RETAIL SALES OF LICENSED FASHION MERCHANDISE, WORLDWIDE, BY TERRITORY, 2017



SOURCE: THE LICENSING LETTER

### LoL SURVEY

## The Language of Licensing II

Two years ago, we launched *TLL's* first survey on the language of licensing to explore changing trends in terminology, business tactics, industry trends, and the way we navigate them. Here's the second iteration of *TLL's Language of Licensing (LoL) Survey*. Any direct quotations below may have been lightly edited for spelling, grammar, and space.

Interestingly, based on the comments we've received, just about under one-third of respondents to the 2018 *LoL Survey* believe that licensing essentially hasn't changed over the years. One executive who's been the business for over 20 years noted: "the same basic licensing concepts are repackaged, renamed, and redefined every decade or so." Another veteran confirmed that despite more "rules, regulations, and requirements, the basic rules have not really changed."

It's not all good, as one licensor points out: The "industry is stagnant" and "relying on an old business model" that doesn't bring the same type of value to brand owners. Suggested solutions to this situation from others include: more technology (although another

*Continued on page 17*

# ➡ Licensing Ledger

As **Levi Strauss** prepares to open its largest store in the world in the form of a new Times Square flagship, it is also gearing up for an IPO that would value the company at up to \$5 billion. The 145-year-old jeans manufacturer had gone public once before, in 1971, and is now privately held by the descendants of the family of Levi Strauss who took the company private in a \$1.7 billion leveraged buyout in 1984. This time, Levi's is looking to raise between \$600 and 800 million in Q1 2019. Levi's designs and sells apparel under the Levi's, Dockers, and Denizen brands. The company operates about 2,900 retail stores and its products are sold in about 50,000 retail locations across 110 countries.

**Moose Toys** purchases all assets of U.K.-based **Worlds Apart**, including the **Scruff-a-Luvs**, **Ready Beds**, and **Kid Active** toy brands.

**Authentic Brands Group (ABG)** completes its purchase of a majority stake in the IP of the **Camuto Group's** proprietary brands—including **Vince Camuto**, **Louise et Cie**, **Sole Society**, **CC Corso Como**, **Enzo Angiolini**—in partnership with **DSW**. With a 60% stake, ABG assumes the marketing, business development, and licensing functions of the footwear and accessories brands. DSW takes on the remaining 40% and the **Camuto Group** operation including its renowned design, sourcing, production, and wholesale infrastructure.

ABG also finalizes its acquisition of **Heritage Home Group's** **Thomasville**, **Henredon**, and **Drexel** brands. ABG and **SB360 Capital Partners**, an entity controlled by **Jay Schottenstein**, will own and manage the brands. Including its recent brand acquisitions **Nautica**, **Nine West**, **Bandolino**, and **Vision Street Wear** (in partnership with **Shanghai Fanking**), ABG's global brand portfolio is now worth \$9 billion in annual retail sales.

Separately, ABG launches **Thalia Sodi**, an all-new women's apparel collection for the Mexican market at 50 **Promoda** locations, set to expand to 150 by the end of 2019. The ready-to-wear collection is inspired by the Latin singer, songwriter, actress, fashion designer, and entrepreneur of the same name.

**Goliath** acquires **Vivid Toy Group** from **Privet Capital** for an undisclosed sum. With the addition of the European toyco, its brands now include **Pressman Toy**, **JAX**, **Tucker Toys (U.S.)**, **Crown & Andrews** and **Britz 'n Pieces/Wahu (Australia)**, **Modelco (France)**, and **Elephanta (New Zealand)**—making **Goliath** the second-largest game company in France and third-largest in the U.S.

**CBS Consumer Producers** and the **Museum of Pop Culture (MoPOP)** send **Star Trek** on the road with the debut of *Star Trek: Exploring New Worlds* at **The Children's Museum of Indianapolis**. The fully immersive exhibition features more than 100 rare artifacts, set pieces, and props from the television series—it will pack up from its popular Seattle location and head over to the world's largest children's museum from Feb. 2 to April 7, 2019.

**Fred Rogers Productions** teams up with the **Brad Simon Organization** and **Bay Area Children's Theatre** to bring the first *Peg + Cat* musical to audiences across the U.S. The production will feature large-scale puppets, light-up math facts, songs from the show, and other elements. **Purdue University** will be on site at select performances to administer a unique nationwide study of the basic math skills children learn after attending the live show.

As a result of a strong, early demand for tickets, **Feld Entertainment** and **Universal Brand**

**Development** extend the run of *DreamWorks Trolls The Experience* in New York City for an additional five months. The location-based, social-worthy adventure will now run Oct. 22 through May 12, 2019.

**Perry Ellis Intl.** is successfully taken private in a \$437 million transaction by a **George Feldenkreis**-controlled entity.

French private equity fund **PAI Partners** has completed its acquisition of global tabletop game powerhouse **Asmodee Group** from **Eurazeo**.

**BSN Sports**, a division of **Varsity Brands**, finalizes its acquisition of **Mountain Mesa Sports, Inc. dba B&H Sports**.

**Chicken Soup for the Soul Entertainment** acquires the assets of **Truli.com**, a global family-friendly and faith-based online video channel. The acquisition includes 2,500 hours of programming and brings **CSS Entertainment** an additional 630,000 Facebook fans.

**Cheddar** acquires **Viacom's Rate-MyProfessor**. Cheddar had already picked up **Viacom** distribution platform **MTV Networks on Campus**.

As part of its 10th year anniversary celebrations, **Toho's** **Godzilla** gets a constellation courtesy of **NASA** and scientists with **NASA's** **Fermi Gamma-ray Space Telescope**. While the most well-known 88 constellations, such as **Orion** and **Cassiopeia**, are devised by **International Astronomical Union (IAU)**, the staff of **NASA's** **Goddard Space Flight Center** mapped this newest constellation based on gamma-ray sources (i.e., black holes). Other characters who've had the honor include **Hulk**, the product of a gamma-ray experiment gone awry, and the **Little Prince**, the famous fictional visitor of asteroid **B 612**. In 2019, **Godzilla** will celebrate its 65th anniversary with, among other things, the latest installment in a multi-movie series by **Legendary** and **Warner Bros**.



**Executive Editor**  
Karina Masolova  
karina@plainlanguagemedia.com

**Managing Editor**  
Barbara Manning Grimm  
barb@plainlanguagemedia.com

**Data & Digital Coordinator**  
Susan Adams  
susan@plainlanguagemedia.com

**Layout & Graphic Designer**  
David van der Gulik

**Business Development Manager**  
Jennifer Frost  
jen@plainlanguagemedia.com

**Marketing Director**  
Michael Sherman  
michaels@plainlanguagemedia.com

**Customer Service**  
customerservice@plainlanguagemedia.com

**General Manager**  
Jim Pearmain

**CEO**  
Mark Ziebarth

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Plain Language Media, LLLP 15 Shaw Street, New London, CT, 06320; Phone: 888-729-2315; Fax: 855-649-1623

## Licensed Fashion Sales Up

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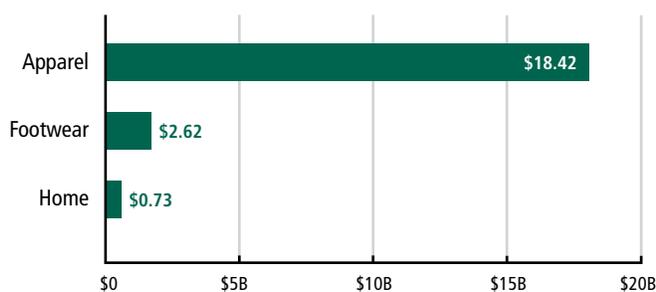
Within the broader accessories category, the fastest-growing consumer goods were luggage and travel accessories (3.0% growth), followed by handbags, backpacks, and messenger bags (2.6%). This growth is largely a sign that the sub-categories have stabilized—in 2015, retail sales declined by double-digits.

The only one of two product categories to contract was toys/games at -4.5% growth. The broader toys/games category shrunk -4.4% in 2017—compared to a -8.0% loss for entertainment/character brands, this dip in sales was more or less acceptable. Fashion-based toy/game sales have either remained flat or declined since 2009.

The other category to see a dip in sales was health & beauty aids (HBA) at -0.7%, thanks to a dip in licensed fragrance sales (-1.5%). This decline is attributable in large part to formerly licensed brands taking their programs in-house, rather than a decline in sales for fragrance generally. Sales are expected to jump for year 2018.

Gifts/novelties jumped 5.0% in 2017, after declining -4.7% in 2016 and -4.0% in 2015. Category sales have declined or remained flat every year since 2009.

**RETAIL SALES OF LICENSED MERCHANDISE,  
BASED ON FASHION PROPERTIES, U.S./CANADA, 2017**  
(Figures in Billions)



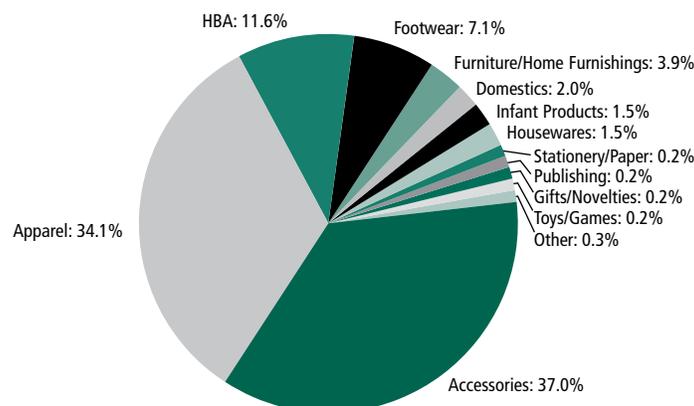
Note: Numbers may not add up exactly due to rounding.  
SOURCE: The Licensing Letter

**RETAIL SALES OF LICENSED MERCHANDISE, BASED ON FASHION  
PROPERTIES ORIGINATING AS APPAREL, FOOTWEAR & HOME,  
U.S./CANADA, 2016–2017** (Figures in Millions)

PROPERTY TYPE	RETAIL SALES, 2016	RETAIL SALES, 2017	CHANGE, 2016–2017	SHARE, 2017
Apparel	\$18,204	\$18,423	1.2%	84.9%
Footwear	\$2,557	\$2,621	2.5%	11.9%
Home	\$688	\$732	6.4%	3.2%
<b>Total Fashion</b>	<b>\$21,449</b>	<b>\$21,776</b>	<b>1.5%</b>	<b>100.0%</b>

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

**RETAIL SALES OF LICENSED FASHION MERCHANDISE,  
BY PRODUCT CATEGORY, U.S./CANADA, 2017** (Figures in Billions)



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

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

PRODUCT CATEGORY	RETAIL SALES, 2016	RETAIL SALES, 2017	CHANGE, 2016–2017	SHARE, 2017
Accessories	\$7,961	\$8,064	1.3%	37.0%
Eyewear	\$2,445	\$2,475	1.2%	11.4%
Jewelry and Watches	\$1,142	\$1,150	0.7%	5.3%
Handbags, Backpacks, Messenger Bags	\$718	\$738	2.7%	3.4%
Luggage and Travel Accessories	\$325	\$335	3.0%	1.5%
Headwear	\$1,831	\$1,837	0.3%	8.4%
Hosiery	\$754	\$772	2.3%	3.5%
Scarves and Ties	\$98	\$99	0.7%	0.5%
Other	\$647	\$659	2.0%	3.0%
Apparel	\$7,239	\$7,428	2.6%	34.1%
Domestics	\$419	\$429	2.3%	2.0%
Footwear	\$1,532	\$1,556	1.6%	7.1%
Furniture/Home Furnishings	\$835	\$846	1.3%	3.9%
Gifts/Novelties	\$46	\$48	5.0%	0.2%
HBA	\$2,549	\$2,530	-0.7%	11.6%
Fragrance	\$2,112	\$2,080	-1.5%	9.6%
Cosmetics/Nail Polish/Other	\$437	\$450	3.0%	2.1%
Housewares	\$324	\$328	1.4%	1.5%
Infant Products	\$334	\$336	0.5%	1.5%
Publishing	\$48	\$49	1.6%	0.2%
Stationery/Paper	\$53	\$54	1.8%	0.2%
Toys/Games	\$49	\$46	-4.5%	0.2%
Other	\$60	\$61	1.6%	0.3%
<b>Total</b>	<b>\$21,449</b>	<b>\$21,776</b>	<b>1.5%</b>	<b>100.0%</b>

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

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### Specialty, Mid-Tier & Ecommerce Drive Fashion

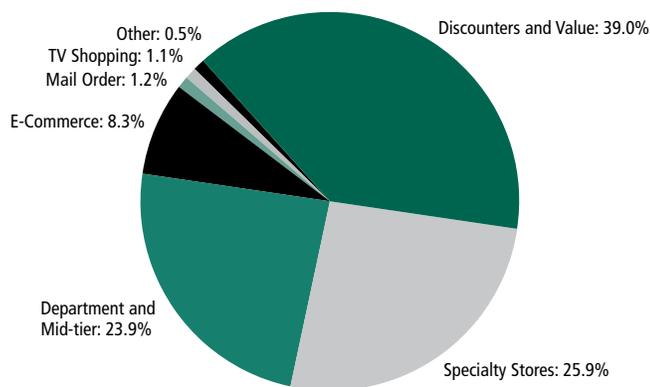
On the distribution side, the fastest-growing channel in 2017 for the U.S./Canada was ecommerce at 4.3% growth. Unlike most of the other five major property types TLL tracks, ecommerce accounts for a smaller share of total fashion sales at just 8.3% share of all licensed retail sales.

The largest category, discounters and value, inched ahead with 1.1% growth to reach just over \$8.5 billion in retail sales for 2017. The second- and third-largest channels,

specialty stores at 25.9% and department and mid-tier retailers at 23.9%, likewise observed relatively stunted 1.6% and 1.5% growth compared to 2016, respectively.

While most licensed channel trends mirror that of the broader fashion business, mail order is an exception. With the rise of subscription-type services, fashion apparel and higher-end HBA consumer goods have not only observed an uptick in online-based sales but also the relatively retro catalog, mail order, and TV shopping channels. This trend is expected to subvert in the coming years.

SHARE OF RETAIL SALES OF LICENSED FASHION MERCHANDISE, BY DISTRIBUTION CHANNEL, U.S./CANADA, 2017



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

SOURCE: THE LICENSING LETTER

RETAIL SALES OF LICENSED FASHION MERCHANDISE, BY DISTRIBUTION CHANNEL, U.S./CANADA, 2016-2017 (Figures in Millions)

DISTRIBUTION CHANNEL	RETAIL SALES, 2017	RETAIL SALES, 2016	CHANGE, 2016-2017	SHARE OF SALES, 2017
Discounters and Value	\$8,501	\$8,408	1.1%	39.0%
Specialty Stores	\$5,644	\$5,555	1.6%	25.9%
Department and Mid-tier	\$5,203	\$5,126	1.5%	23.9%
E-Commerce	\$1,812	\$1,737	4.3%	8.3%
Mail Order	\$272	\$279	-2.5%	1.2%
TV Shopping	\$234	\$236	-1.0%	1.1%
Other	\$110	\$107	2.5%	0.5%
<b>Total</b>	<b>\$21,776</b>	<b>\$21,449</b>	<b>1.5%</b>	<b>100.0%</b>

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

SOURCE: THE LICENSING LETTER

## TOYS & GAMES

### One-Quarter of Top 2018 Holiday Toys are Licensed

Roughly 29% of the top 2018 holiday toys are licensed, according to lists created by Walmart, Target, Amazon, and Kmart and a TLL analysis of the same.

In 2017, retail sales of licensed toys/games sank -4.4% to \$7.7 billion in the U.S./Canada, according to TLL's *Annual Licensing Business Survey*. This was largely due to the impact of the Toys 'R' Us bankruptcy, but other contributing factors included an increased interest in owned-brand collectibles and traditional toys/games.

Kmart's Fab 15 has the highest share of licensed toys on its holiday toys list, followed by Target (25%), Walmart (23%), and Amazon (20%). Counting all 111 toys, including duplicates, 25% of the top holiday toys of 2018 are licensed. This is a marked downturn from last year's lists, of which roughly one-third of top holiday toys were licensed, and 2016's lists, of which roughly half were licensed.

Roughly 26% of Target's list and 23% of Walmart's list counts retailer exclusive offerings.

Paw Patrol and other preschool properties were out on top, with Paw Patrol alone making up 15% of all licensed offerings. Disney's Mickey, Minnie & Friends brands as well as Warner Bros.' Harry Potter were second at 11% each. Other brands with two mentions each were Marvel Avengers, Jurassic World, and Beyblade.

The rest, with only one mention, in no particular order are: Incredibles 2, Skee-Ball, Star Wars, Sunny Day, Sesame Street, Batman, Ryan's World, Nella the Princess, PJ Masks, Unikitty, and Vampirina.

The most popular manufacturers among the four lists are Hasbro (21% of all 111 toys incl. duplications), MGA Entertainment (10%), Mattel (9%), and Spin Master (7%). Kmart is the only retailer to heavily feature Just Play and, likewise, Walmart the only one for Jakks Pacific.

## TOP TOYS OF THE 2018 HOLIDAY SEASON

WALMART'S TOP RATED BY KIDS TOY LIST	TARGET BULLSEYE'S TOP TOYS	AMAZON TOP 25 TOY LIST	KMART'S FAB 15 LIST
<ul style="list-style-type: none"> <li>■ Air Hogs Supernova (Spin Master)</li> <li>■ All Star Hoverboard<sup>°</sup></li> <li>■ Barbie Dreamhouse (Mattel)</li> <li>■ Disney Princess Rapunzel Tower Vanity<sup>°</sup></li> <li>■ Drone Force Terraset RC</li> <li>■ Fingerlings Hugs (WowWee)</li> <li>■ Fischer-Price Imaginext Jurassic World Rex‡</li> <li>■ Fisher Price Laugh &amp; Learn 3-in-1 Smart Car (Hasbro)</li> <li>■ Fisher-Price Little People Take Turns Skyway (Hasbro)</li> <li>■ Harry Potter Wizard Training Wand‡ (Jakks Pacific)</li> <li>■ Hot Wheels Ultimate Garage<sup>°</sup> (Mattel)</li> <li>■ Incredibles 2 Jack Jack Doll‡ (Jakks Pacific)</li> <li>■ Kumi Kreator (Spin Master)</li> <li>■ L.O.L. Surprise House (MGA)</li> <li>■ LEGO Creator Pirate Roller Coaster</li> <li>■ Little Live Pets Rollie My Kissing Puppy (Moose Toys)</li> <li>■ Little Live Pets Wrapples (Moose Toys)</li> <li>■ Little Tikes STEM Jr. Wonder Lab (MGA Entertainment)</li> <li>■ Lost Kitties (Hasbro)</li> <li>■ Moj Moj Claw Machine (MGA Entertainment)</li> <li>■ Nerf Laser Ops 2 Pack (Hasbro)</li> <li>■ Num Nom Silly Shakers Maker (MGA Entertainment)</li> <li>■ Paw Patrol Fire Truck Ride-On<sup>°</sup></li> <li>■ Paw Patrol Ultimate Fire Truck‡ (Spin Master)</li> <li>■ Peppa Pig Fun Fair Playset<sup>°</sup> (Jazwares)</li> <li>■ Pikmi Pops Super Flip (Moose Toys)</li> <li>■ PJ Masks Romeo's Lab Playset‡</li> <li>■ Playmobil Hidden Temple with T-Rex</li> <li>■ Polaris 1.5 RC<sup>°</sup></li> <li>■ Power Wheels Barbie Dream Camper<sup>°</sup> (Mattel)</li> <li>■ Razor Ultra Spark Scooter</li> <li>■ Really Rad Robots Mi-Bro (Moose Toys)</li> <li>■ Rideamals Scout Interactive Pony<sup>°</sup></li> <li>■ Ryan's World Giant Mystery Egg‡ (Pocket.watch)</li> <li>■ Sing &amp; Spin Scooter Minnie‡</li> <li>■ Trail Buster RC<sup>°</sup></li> <li>■ Treasure X Single Pack (Moose Toys)</li> <li>■ VTech Explore &amp; Write Activity Desk</li> <li>■ Zoom Tubes Car Trax</li> </ul>	<ul style="list-style-type: none"> <li>■ Baby Alive Sweet Spoonfuls Doll<sup>°</sup> (Hasbro)</li> <li>■ Barbie Dreamhouse (Mattel)</li> <li>■ Beyblade Ultimate Tournament Collection‡ (Hasbro)</li> <li>■ Boxer Interactive A.I. Robot (Spin Master)</li> <li>■ Buffalo Games Skee-Ball<sup>°</sup></li> <li>■ Cool Maker KumiKreator (Spin Master)</li> <li>■ Fingerlings Interactive Plush Monkey (WowWee)</li> <li>■ Fischer-Price Imaginext Jurassic World Rex‡</li> <li>■ Fisher-Price Smart Learning Home (Hasbro)</li> <li>■ Fisher-Price Think &amp; Learn Rocktopus (Hasbro)</li> <li>■ furReal Rock-A-Too the Show Bird<sup>°</sup> (Hasbro)</li> <li>■ Hatchimals HatchiBabies (Spin Master)</li> <li>■ Hot Wheels Gator Car Wash (Mattel)</li> <li>■ Jetson Rogue Hoverboard<sup>°</sup></li> <li>■ L.O.L. Surprise! Bigger Surprise! (MGA)</li> <li>■ LEGO Super Heroes App-Controlled Batmobile‡</li> <li>■ LEGO Unikitty Unikingdom Fairground Fun‡</li> <li>■ Lupita Doll &amp; Book Set<sup>°</sup></li> <li>■ Melissa &amp; Doug Deluxe Play Store</li> <li>■ Nella the Princess Knight Transforming Princess Knight‡<sup>°</sup> (Vivid Toy)</li> <li>■ NERF Laser Ops Pro (Hasbro)</li> <li>■ Nintendo Switch</li> <li>■ Our Generation Doll School Room<sup>°</sup></li> <li>■ Party PopTeenies Mega Party Surprise Set<sup>°</sup></li> <li>■ Paw Patrol Ultimate Fire Truck‡ (Spin Master)</li> <li>■ Pikmi Pops Unicorn Super Flip<sup>°</sup> (Moose Toys)</li> <li>■ Really Rad Robots MiBRO R/C Robot</li> <li>■ Sesame Street Let's Dance Elmo‡ (Hasbro)</li> <li>■ Super Crate Creatures Surprise</li> <li>■ Transformers Power Charge Bumblebee (Hasbro)</li> <li>■ Viro Rides 550e Electric Scooter</li> <li>■ YULU Tic Tac Tongue<sup>°</sup></li> </ul>	<ul style="list-style-type: none"> <li>■ Baby Alive Potty Dance Baby (Hasbro)</li> <li>■ Barbie Care Clinic Vehicle (Mattel)</li> <li>■ Cozmo Robot (Anki)</li> <li>■ Don't Step In It Game, Unicorn Edition (Hasbro)</li> <li>■ furrREAL Munchin' Rex (Hasbro)</li> <li>■ Hasbro Gaming Monopoly Cheaters Edition Family</li> <li>■ Hot Wheels Corkscrew Crash Track Set (Mattel)</li> <li>■ Kano Harry Potter Coding Kit‡</li> <li>■ L.O.L. Surprise! Surprise House (MGA Entertainment)</li> <li>■ L.O.L. Surprise! Bigger Surprise! (MGA)</li> <li>■ L.O.L. Surprise! Glam Glitter Series Doll (MGA)</li> <li>■ Lego Boost Creative Toolbox</li> <li>■ LEGO Harry Potter Hogwarts Great Hall Building Kit‡</li> <li>■ Little Live Scruff-A-Luvs (Moose Toys)</li> <li>■ littleBits Avengers Hero Inventor Kit‡</li> <li>■ Melissa &amp; Doug Examine &amp; Treat Pet Vet Play Set</li> <li>■ Moj Moj Claw Machine (MGA Entertainment)</li> <li>■ Nerf Rival Prometheus MXVIII-20K (Hasbro)</li> <li>■ Osmo Genius Kit for Fire Tablet<sup>°</sup> and iPad</li> <li>■ Ozobot Bit Coding Robot</li> <li>■ Paw Patrol Ultimate Fire Truck‡ (Spin Master)</li> <li>■ Pomsies Patches Plush Interactive Toys</li> <li>■ Radio Flyer My 1st Wagon</li> <li>■ Star Wars FurReal Ultimate Co-Pilot Chewie Interactive‡ (Hasbro)</li> <li>■ You've Got Crabs (Exploding Kittens)</li> </ul>	<ul style="list-style-type: none"> <li>■ 2018 Holiday Barbie (Mattel)</li> <li>■ Baby Alive Potty Dance Baby (Hasbro)</li> <li>■ Barbie Dreamhouse (Mattel)</li> <li>■ Beyblade SwitchStrike Battle Tower‡ (Hasbro)</li> <li>■ Disney Mickey Mouse Clubhouse Hot Diggity Dancing Mickey‡ (Just Play)</li> <li>■ Disney Sing and Spin Scooter Minnie‡ (Just Play)</li> <li>■ Hairdorables (Just Play)</li> <li>■ Hot Wheels Mega Garage (Mattel)</li> <li>■ L.O.L. Surprise! Bigger Surprise! (MGA)</li> <li>■ LEGO Super Heroes The Hulkbuster Smash‡</li> <li>■ Monopoly Cheaters Edition (Hasbro)</li> <li>■ Nerf Rival Prometheus (Hasbro)</li> <li>■ Ready2Robot Battle Pack (MGA)</li> <li>■ Sunny Day— Sunny's Styling Head‡ (Fisher-Price/Hasbro)</li> <li>■ Vampirina Rock N' Jam Touring Van‡ (Just Play)</li> </ul>

Note: ‡Licensed offering. <sup>°</sup>Retailer exclusive.

SOURCE: THE LICENSING LETTER

## SPORTS

## Roundup: Sports & Sportswear News

Athletic specialty retailer **Hibbett Sports** will acquire **City Gear**, a city specialty retailer of premium athletic footwear, apparel, and accessories with 135 stores in 15 states, by early December. The transaction includes \$88 million in cash to be paid at closing and the potential for up to \$25 million in additional consideration paid over the next two years. Last year, City Gear reported roughly \$190 million in revenue.

**Canada Goose** enters the outdoor footwear market with its acquisition of boot company **Baffin**. The outerwear manufacturer closed the transaction with \$32.5 million Canadian dollars; as well as cold-weather performance footwear, Baffin also caters to the hiking, hunting lifestyle and fishing categories.

Fortnite creator **Epic Games** secures a funding round worth approximately \$1.25 billion from more than half a dozen companies including KKR, Iconiq Capital, Smash Ventures, Vulcan Capital, aXiomatic, Kleiner Perkins, and Lightspeed Venture Partners. They join existing minority shareholders Disney, Tencent, and Endeavor. With this additional support, the North Carolina-based company is now valued at more than \$15 billion.

**MGM Resorts** locks in a multi-million dollar gaming partnership with the New York Jets—the first **NFL** deal that goes beyond a straight casino sponsorship. The deal also includes in-stadium signage and the sponsorship of the Jets studio.

**Altered Reality Corp.** crafts a licensing partnership with the NFL Players Association (NFLPA), to create the first shareable 3D imagery of NFL Players. The athletes will become “virtual presences” in ARC’s mobile AR app, which will feature seven stars at launch: Josh Allen, Saquon Barkley, Sam Darnold, Lamar Jackson, Baker Mayfield, Josh Rosen, and JuJu Smith-Schuster.

The **NCAA** is forming a new ad hoc committee designed to take a “hard look” at the impact of sports wagering and its “potential impact on current NCAA rules, educational efforts, player availability reporting, and any associated risks as more states legalize sports wagering.” Current rules prohibiting sports wagering by student-athletes or athletics employees remain in effect.

**Girl Up** and **WWE** unveiled a multi-year partnership to support the creation of Sports For a Purpose, which will launch in the fall of 2019 and “create a culture of sports participation for girls around the world.” The program will equip Girl Up’s girl leaders to help tackle gender-based barriers girls face to playing sports, including access to safe play spaces and sporting equipment.

**Harris Blitzer Sports & Entertainment** strikes a multi-year partnership with **Caesars Entertainment** and the sports and entertainment conglomerate’s sports

properties: the Philadelphia 76ers, New Jersey Devils and Prudential Center. The partnership introduces New Jersey sports fans to Caesars’ new sports book experience at two of its Atlantic City properties and mobile app through special promotions and activations inside the Caesars Club at Prudential Center.

Newborn **MLS** club **FC Cincinnati** unveils its brand identity, crafted in tandem with **Interbrand**. Football Club Cincinnati retains its orange and blue color scheme in “brighter and bolder” tones, with a new crest developed as a representative of the city.

**FIFA’s** plans to launch a Club World Cup and Global Nations League have been put on hold because of resistance from UEFA and European clubs. A task force will be launched to look into tournament options before reporting back to the FIFA Council when they meet again in March 2019.

**Varsity Spirit** partners with **Fabletics**, the active lifestyle brand launched by Kate Hudson in 2013. Fabletics will be the official, exclusive 2018-19 and 2019-20 sponsor for activewear apparel for Varsity Spirit’s cheer and dance educational camps and over 600 competitions. As part of the deal, Fabletics will launch pop-up shops, custom collections, and active lifestyle experiences at up to 20 premier championship competitions each season and also have a presence at events held at the Walt Disney World Resort.

USPA Global Licensing Inc. (**USPAGL**), the official licensing arm and national broadcaster of the **U.S. Polo Assn.**, plans to add roughly 100 retail stores in 2018 in key regions such as India, China, Turkey, Middle East, and Eastern Europe. The brand now counts 1,050 monobrand retail stores globally (only 10% in outlet locations) and plans to exceed 1,300 stores over the next several years. The \$1.6 billion brand is now represented in 166 countries worldwide and enjoyed strong double-digit growth in 2018.

**Forbes** unveils its ranking of the most valuable esports companies. The list was created after “talking to company owners, bankers, and industry experts,” and the numbers were “applied during each company’s most recent capital raise, comparable esports transactions, and their prospects.” Here are the rankings:

- |                          |                                  |
|--------------------------|----------------------------------|
| 1. Cloud9: \$310 M       | 7. G Gaming: \$110 M             |
| 2. Team SoloMid: \$250 M | 8. G2 Esports: \$105 M           |
| 3. Team Liquid: \$200 M  | 9. Immortals: \$100 M            |
| 4. Echo Fox: \$150 M     | 10. Envy Gaming: \$95 M          |
| 5. OpTic Gaming: \$130 M | 11. 100 Thieves: \$90 M          |
| 6. Fnatic: \$120 M       | 12. Counter Logic Gaming: \$50 M |

# Licensing News

## Properties Available Or Recently Assigned, U.S.

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
emoji	Lifestyle brand features the iconic emoji logo and more than 15,000 icons.	All	Michael Connolly, Retail Monster Brand Extension & Licensing Co.
Happy News (The)	Bright and cheery lifestyle products combine uplifting and motivational messages with unique hand-drawn illustrations from illustrator Emily Coxhead.	All	Steven Heller, Brand Liaison (The)

## Licenses Recently Granted, U.S.

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Authentic Hendrix	Libertine	Apparel	Epic Rights
B.U.M. Equipment	Vandale Industries	Loungewear (men's), sleepwear (men's)	B.U.M. Equipment
Ben 10	BOOM! Entertainment/BOOM! Studios, Inc.	Graphic novels	Cartoon Network Enterprises
	Sonic Drive-In	Promotional toys	
Black Mirror	Asmodee North America	Board games	Endemol Shine North America
	Loot Crate	Subscription service	
Boo - The World's Cutest Dog	Ecell Global Ltd.	Mobile phone covers, tablet covers	Spotlight Licensing & Brand Management
	NobleWorks	Greeting cards, note cards	
Charmed	Ata-Boy	Gifts, novelties	CBS Consumer Products
	Dynamite Entertainment	Manga	
	Surreal Entertainment	Automotive accessories, home products	
Corona	Reef div. VF Outdoor	Board shorts, flip flops, headwear, sandals	Joester Loria Group (JLG)
Daniel Tiger's Neighborhood	ASO LLC	First aid products	9 Story Brands div. 9 Story Media Group
	Church & Dwight	Oral care products	
	Cra-Z-Art	Activity products, jumbo color pads, wooden puzzles	
	Custom Personalization Solutions (CPS)	Personalized products, print-on-demand products	
	Handcraft Manufacturing	Underwear (children's)	
	JAKKS Pacific	Master toy	
	Party City Holdings	Party decorations	
York Wallcoverings & RoomMates	Murals, wall decals, wallpaper		
Despicable Me	Magic Jump	Inflatable play sets	Universal Brand Development
Disney	Magic Jump	Inflatable play sets	Disney Consumer Products
Garfield	Forecast Agency (The)	Accessories, apparel	King Features Syndicate
Goodful	Aerogarden/AeroGrow Intl. Inc.	In-home gardening systems	BuzzFeed Media Brands
	Conair/Cuisinart	Home electronics	
	Epoca Intl.	Housewares	
	Welspun U.S.A.	Bedding	
Great British Baking Show (The)	Con*Quest Journals	Journals, planners, recipe cards, stickers, sticky notes	Spotlight Licensing & Brand Management
Grinch (The)	Bark (BarkBox)	Subscription service	Universal Brand Development
Home Alone	BoxLunch	T-shirts	20th Century Fox Consumer Products
	Hot Topic	Shirts	
	Target	Board games	
	Think Geek	Hoodies, t-shirts	
JoJo Siwa	CozyPhones/Halo Acoustic Wear	Headphones	Nickelodeon & Viacom Consumer Products (NVCP)

\*Extension or renewal.

Continued on page 8

**Licensing News** *Continued from page 7***Licenses Recently Granted, U.S.**

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Justice League	Magic Jump	Inflatable play sets	Warner Bros. Consumer Products
Late Late Show With James Corden (The)	Surreal Entertainment	Automotive accessories, home products	CBS Consumer Products
Lionel Trains	Roundhouse Displays	Display cases (model trains)	Lisa Marks Associates (LMA)
Loteria	Active Brand Commerce	Apparel (adults'), apparel (infants', toddlers'), mugs, pet apparel, tote bags, wall decor	Licencias Mexicanas
Mario Lopez	American Exchange Group	Footwear (boys', men's)	ACI Licensing
Marvel	Magic Jump	Inflatable play sets	Disney Consumer Products
Men In Black x Ghostbusters	IDW Games div. IDW Media Holdings	Tabletop games	Sony Pictures Consumer Products
Oddbods	goGame (subs. Sega)	Mobile games	One Animation
Peaky Blinders	Calendar Holdings/Calendars.com/Go! Retail Group	Wall calendars	Endemol Shine North America
Royal Touch (The)	Harry & David LLC	Baked goods, breads, cakes	Royal Touch (The)
Rugrats	FYE div. Trans World Entertainment	Chocolate bars	Nickelodeon & Viacom Consumer Products (NVCP)
Star Wars	Magic Jump	Inflatable play sets	Disney Consumer Products
Superman	Cubicall	Phone booths	Warner Bros. Consumer Products
Teenage Mutant Ninja Turtles	CozyPhones/Halo Acoustic Wear	Headphones	Nickelodeon & Viacom Consumer Products (NVCP)
University of New Mexico (The)	Rio Bravo Brewing Co.	Beer	Learfield Licensing Partners
World of Eric Carle (The)	Print All Over Me (PAOM)	Apparel	Joester Loria Group (JLG)
WWE	Bixler	Jewelry	World Wrestling Entertainment (WWE)
	Jazwares	Domez collectibles	
	New Era Cap	Headwear	

**International Properties Available or Recently Assigned**

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
Addams Family (The, animated film)	Animated film adaptation of Charles Addams' cartoons starring a peculiar, ghoulish family.	All (EMEA)	Peter Byrne, CPLG (U.K.)
BalanceDiet	Health and wellness brand with over 25 yrs. of quality reputation and expertise in the wellness and healthy living space.	Home goods, kitchen goods, small kitchen appliances, spices (North America)	Christopher Palumbo, Leisure Growth Holdings
Derry Girls	Comedy follows four teen girls (and one awkward boy) attending a convent school against the backdrop of '90s Northern Ireland ethno-nationalist conflicts.	All (U.K., Ireland)	Rob Wijeratna, Rocket Licensing
Emily the Strange	This beloved counterculture icon, a moody goth girl and her cats, marks her 25th anniversary this year.	All (U.S., Canada)	Cynthia Modders, Firefly Brand Management
emoji	Lifestyle brand features the iconic emoji logo and more than 15,000 icons.	All (Mexico)	Elias Fasja Cohen, Tycoon Enterprises (Mexico)
		All (France)	Clementine Goutaine, CPLG (France)
		All (Greece)	CPLG (Turkey/Greece)
Grit House	Lifestyle brand whose graphics say everything about hard working Americans who have a love for their country and the freedom to express it.	All (Worldwide)	Steven Heller, Brand Liaison (The)
Hang Ten	Original surf and California lifestyle brand since 1960. Carries the globally-recognized "Feet" mark, an icon with nostalgic appeal.	Accessories (U.S., Canada)	Denise Setton, Hang Ten
Horrible Histories: The Movie - Rotten Romans	Film based on the award winning children's historical comedy book series by Scholastic.	All (U.K.)	Rob Wijeratna, Rocket Licensing
Larva	Animated series follows the misadventures of two adorable and hilarious larva.	All (North America)	Michael Carlisle, Wildflower Group (The)
Lifestyle Camo	Lifestyle brand by Sirphis (form. Moon Shine Camo) for life between hunts. Camo with a twist born out of a demand fresh and innovative camouflage.	All (Worldwide)	Steven Heller, Brand Liaison (The)

\*Extension or renewal.

*Continued on page 9*

## Licensing News *Continued from page 8*

### International Properties Available or Recently Assigned

PROPERTY	DESCRIPTION	CATEGORIES AVAILABLE	LICENSING CONTACT
<b>MGM properties</b>	One of the world's deepest libraries of film and TV content. Titles incl. Pink Panther, Rocky franchise, Vikings, Teen Wolf, and the upcoming animated The Addams Family.	All (ANZ)	Travis Rutherford, Evolution USA
<b>Muddy Girl</b>	Female camouflage brand by Sirphis with specific coloration for the outdoor enthusiast who loves camo but wants a fashionable option.	All (Worldwide)	Steven Heller, Brand Liaison (The)
<b>Oggy &amp; the Cockroaches</b>	Animated series about a lazy cat who enjoys living a simple life; unfortunately, his roommates are tiny cockroaches who like to cause mayhem.	All (North America)	Leslie Levine, Licensing Works!
<b>Olobob Top</b>	Quirky preschool series nurtures children's creativity as a group of friends build new characters from the shapes that make up world.	All (U.K., Europe)	Leah Dever, Those Licensing People (TLP)
<b>Pocket.watch</b>	Children's media brand combines digital grassroots with the enduring power of classic epic storytelling, for small-screen video, big-screen, games, toys, and more.	All (U.K., Eire, ANZ)	Gail Mitchell, Centa IP
<b>Pulse</b>	Designer brand uses natural surfaces within bold designs and endless colorations to create a fresh new look.	All (Worldwide)	Steven Heller, Brand Liaison (The)
<b>Sissi the Young Empress</b>	Animated series follows a strong, free-spirited princess, based on a historical figure, who resists etiquette and the duty of court to follow her heart and dreams.	All (GAS)	Anita Van Esch, Active Merchandising
<b>Smithsonian Institution</b>	Group of museums and research centers established in 1846 "for the increase and diffusion of knowledge"; administered by the U.S. government.	All (U.K.)	Sarah Dixon, IPR Licensing
<b>True and the Rainbow Kingdom</b>	An intelligent, fearless heroine and her best friend, Bartleby the cat, help the whimsical citizens of the Rainbow Kingdom with their problems in this preschool series.	All (China)	Hengxin Shambala Culture Co., Ltd. (HSK)
<b>Trulli Tales</b>	Four young inhabitants of Trulliland have been chosen to protect the kingdom's most valuable item, the Magic Cookbook.	All (U.K., Ireland)	Caroline High, Boat Rocker Rights div. Boat Rocker Media
<b>UniVersus</b>	Toy-based brand; it's up to kids to help free collectable alien characters trapped in sand-filled pods by decrypting secret codes and unlocking them from hyper-sleep.	All excl. toys (Worldwide)	Pam Westman, Corus Entertainment/ Nelvana Enterprises
<b>WWE</b>	American integrated media and entertainment company known for professional wrestling.	All (Canada)	Stuart Pollock, Segal Licensing

### International Licenses Recently Granted

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
<b>101 Dalmatian Street</b>	Mattel U.K. Ltd.	Master toy (Europe)	Disney Consumer Products
<b>Archie Comics</b>	Philcos	Knit tops, sweatshirts, t-shirts, tank tops (U.S., Canada)	King Features Syndicate
<b>Art of Marbling (The)</b>	Galleria Enterprises	Apparel, bathrobes, fashion accessories, rain accessories (U.S., Canada)	MHS Licensing + Consulting
	Northcott Silk	Fabric (Worldwide)	
	Siscovers	Bedding, curtains, futon covers, pillows (U.S., Canada)	
	Wilcox Enterprises/Indigo Falls	Drinkware (U.S., Canada)	
<b>Arty Mouse</b>	Value Add Games	Games (Worldwide)	Edutainment Licensing
<b>Authentic Hendrix</b>	Aquarius Entertainment Merchandising	Calendars, posters, puzzles (Worldwide)	Epic Rights
	Bentex Group	Apparel (infants', toddlers') (North America)	
	C-Life Group	Apparel (North America)	
	C&D Visionary	Collectibles, novelties (North America)	
	EMP Merchandising Handelsgesellschaft mbH	Accessories, apparel (Europe)	
	H3 Sportgear	Accessories (North America)	
	Junk Food Clothing	Apparel (Worldwide)	
	KnuckleBonz, Inc.	Collectible figures (Worldwide)	
	Licensing Essentials	Accessories, apparel (ANZ)	
	MJC Intl. Group	Sleepwear (Worldwide)	
<b>Avanti</b>	Elmer Candy Corp.	Boxed chocolates (U.S., Canada)	Lisa Marks Associates (LMA)
	Trends International	Posters (U.S., Canada, Mexico)	
<b>Beatles (The)</b>	Stern Pinball	Pinball machines (Worldwide)	Bravado Intl. Group div. Universal Music Group
<b>Beavis and Butt-head</b>	adidas Group North America	Apparel, footwear (Worldwide)	Viacom Group
<b>Bella Italia</b>	Tesco	Frozen meals (U.K.)	Casual Dining Group

\*Extension or renewal.

*Continued on page 10*

## International Licenses Recently Granted

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Betty Boop	C's Century Promotion	Badges, drinkware, notebooks, pens, stickers, t-shirts, towels (Japan)	King Features Syndicate
	Euro Prosem S.L.	T-shirts (Spain, Portugal)	
	Jada Toys	Die-cast figures, die-cast vehicles (Worldwide)	
	Philcos	Knit tops, sweatshirts, t-shirts, tank tops (U.S., Canada)	
	Stans USA div. American Made Manufacturing	Accessories, apparel, bingo accessories, novelties (U.S., Canada)	
Billy Idol	Funko	Pop vinyl figures (Worldwide)	Epic Rights
Blair O'Neal	Creative Covers for Golf	Golf club covers (Worldwide)	Blair O'Neal c/o 464 Sports Management
Blue Bloods	Acco Brands	Gifts, wall calendars (U.S., Canada)	CBS Consumer Products
Boo - The World's Cutest Dog	Bare Tree Media	Digital stickers (Worldwide)	Spotlight Licensing & Brand Management
	Bradford Exchange	Figurines, tabletop sculptures (U.S., Canada)	
	TabTale	Mobile game apps (Worldwide)	
Brady Bunch (The)	Malibu Shirts	Apparel (Worldwide)	CBS Consumer Products
Britney Spears	Absolute Garments	Fashion tops (Worldwide)	Epic Rights
	Color Bars	Skateboards (North America, Australia)	
	Funko	Pop vinyl figures (Worldwide)	
Bruce Lee	Blitzway Co., Ltd.	Collectible figures (Worldwide)	Bruce Lee Enterprises
	DGK	Apparel (U.S., Canada, Australia, Japan)	Beanstalk Icon Representation
	Forecast Agency (The)	Apparel (U.S., Canada)	
	Rockin Pins	Enamel pins (Worldwide)	Bruce Lee Enterprises
	Royal Bobbles	Bobbleheads (Worldwide)	
	Topix Media Lab Publishing	Collectible magazines (U.S., Canada, Mexico, U.K., Australia, Hong Kong)	Beanstalk Icon Representation
Celine Dion	Nununu	Apparel (children's, infants', toddlers') (Worldwide)	Prominent Brand + Talent
Charmed	Bare Tree Media	Digital stickers (Worldwide)	CBS Consumer Products
	Bioworld Merchandising	Apparel, jewelry (Worldwide)	
	Joe Books Ltd.	Novels (U.S., Canada)	
	Just Funky	Gifts, novelties (U.S. Canada)	
	Ludia	Mobile interactive story game apps (Worldwide)	
	RockLove Jewelry	Jewelry (U.S. Canada, Europe, U.K., ANZ)	
ChuChu TV	Moose Toys	Master toy (Worldwide)	Dream Theatre Pvt. Ltd.
Crawford the Cat	IconLogin Ltd.	Lock screen apps (Worldwide)	Alita's Brand Bar
	KD UK	Tablets (Worldwide)	
Crayola	Haddad Brands	Apparel (children's), apparel (infants') (Worldwide)	Crayola
	Outright Games	Video games (Worldwide)	
Crazy Ex-Girlfriend	Fifth Sun Apparel	Apparel (Worldwide)	CBS Consumer Products
CSI: Crime Scene Investigation	Gameloft	Interactive games (Worldwide)	
	Skywind Group/Skywind Holdings		
Daria	Lazy Oaf	Accessories, apparel (Worldwide)	Brandgenuity
Death Row Records	Bioworld Merchandising	Accessories, apparel, loungewear, sleepwear (Worldwide)	Entertainment One (eOne) - Canada
Death Row Records	Good Smile Company, Inc.	Collectible figures (U.S., Asia)	Entertainment One (eOne) - Canada
	Just Funky	Car accessories, drinkware, home goods, impulse items (U.S., Canada)	
	King Ice	Jewelry (North America, Europe)	
	Philcos	Apparel (Canada)	
	Silver Screen Bottling Co.	Cigars, spirits (Worldwide)	
	TB International GmbH	Apparel (Europe)	
	Trends International	Posters (U.S., Canada, Mexico)	

\*Extension or renewal.

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## Licensing News *Continued from page 10*

### International Licenses Recently Granted

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
DeLorean Motor Co.	Ripple Junction	Apparel (U.S., Canada)	Brand and Blend
Dot.	Candlewick Press/Candlewick Entertainment	Books (U.S, Canada, Australia)	Jim Henson Co.
emoji	Sulamericana Fantasias	Costumes (Brazil)	Lotus Global Marketing (Brazil)
Game of Thrones	Danielle Nicole	Accessories, bags, hand bags (North America)	HBO
Grinch (The)	Forever 21	Accessories, apparel (Worldwide)	Dr. Seuss Enterprises L.P.
Harry Potter	Boots U.K.	Cosmetics, gifts, toiletries (U.K., Ireland)	Warner Bros. Consumer Products (EMEA)
Hey Duggee	TDP Textiles	Pajamas (U.K.)	BBC Worldwide
Home Alone	Forecast Agency (The)	Apparel (U.S., Canada)	20th Century Fox Consumer Products
	Funko	Beanies (toys), novelties, pop vinyl figures, socks (Worldwide)	
	National Entertainment Collectibles Association (NECA)	Figures (Worldwide)	
How to Train Your Dragon: The Hidden World	Posh Paws Intl. Ltd.	Plush (EMEA)	DreamWorks Animation
Jane the Virgin	Fifth Sun Apparel	Apparel (Worldwide)	CBS Consumer Products
John Lennon	EuroGraphics	Puzzles (North America, Europe)	Epic Rights
Jonathan Strange & Mr Norrell	Osprey Games	Games (U.K.)	Bloomsbury Publishing
Jungle Book (The, series)	European & Global Licensing B.V. (EGL)	Master toy (Worldwide excl. Germany)	DQ Entertainment
Larva	Commonwealth Toy & Novelty	Collectibles, master plush, novelties, toys (North America)	Wildflower Group (The)
Late Late Show With James Corden (The)	Fifth Sun Apparel	Apparel (Worldwide)	CBS Consumer Products
Late Show With Stephen Colbert (The)	Fifth Sun Apparel	Apparel (Worldwide)	CBS Consumer Products
Love Boat	Gameloft	Interactive games (Worldwide)	CBS Consumer Products
Lyrics by Lennon & McCartney	Simon & Schuster Children's Publishing	Picture books (children's) (Worldwide)	Epic Rights
MacGyver	Novomatic Americas	Interactive games (U.S., Canada)	CBS Consumer Products
Manchester United	True Religion Apparel	Co-branded apparel (Worldwide)	Manchester United Merchandising
May Gibbs	Walnut Melbourne Pty. Ltd.	Accessories (infants'), apparel (infants', toddlers'), blankets (infants'), footwear (children's), gift sets (Australia)	Merchantwise
Me to You	Build-A-Bear Workshop Europe	Custom plush (U.K.)	Carte Blanche Greetings
Mentos	JCorp	Apparel (Canada)	Lisa Marks Associates (LMA)
Metallica	Nixon	Watches (Worldwide)	Rhino Entertainment div. Warner Music Group
Mickey Mouse	Beats By Dr. Dre	Headphones (Worldwide)	Disney Consumer Products
	Levi Strauss	Apparel, jeans (Worldwide)	
	Rag & Bone	Apparel (Worldwide)	
	Skinnydip London	Accessories, apparel (Worldwide)	
Mighty Mouse	Funko	Figures (Worldwide)	CBS Consumer Products
Monopoly	Ubisoft	Video games (Nintendo Switch) (North America)	Hasbro
Moomins (The)	Macmillan Publishing	Master publishing (Worldwide)	Rights & Brands, Caroline Mickler
Mr. Men & Little Miss	Spin Master U.K.	Gift packs, mobile interactive apps (U.K.)	Sanrio Global Ltd.
Nadiya Hussain	BlissHome Ltd.	Home fragrance, housewares, kitchen textiles, spice racks, tableware (U.K. incl. intl. shipping)	Start Licensing
NASA	Vans	Footwear (North America, Europe, ANZ)	National Aeronautics & Space Administration (NASA)

\*Extension or renewal.

*Continued on page 12*

## International Licenses Recently Granted

PROPERTY	GRANTED TO	PRODUCTS MANUFACTURED	GRANTED BY
Nickelodeon	Dairy Crest	Snacks (U.K.)	Nickelodeon & Viacom Consumer Products (NVCP)
*NSync	Funko	Pop vinyl figures (Worldwide)	Epic Rights
Off the Leash	BrownTrout Publishers	Calendars, diaries (North America, U.K., Ireland, Europe)	Factory Rights/Factory Create
	Half Moon Bay	Bunting box sets (U.K.)	
	Woodmansterne Publications Ltd.	Advent calendars, greeting cards (U.K.)	
On the Prowl	Half Moon Bay	Bunting box sets (U.K.)	
	Woodmansterne Publications Ltd.	Advent calendars, greeting cards (U.K.)	
Our Cartoon President	Bare Tree Media	Digital stickers (Worldwide)	CBS Consumer Products
	Fifth Sun Apparel	Apparel (Worldwide)	
PAW Patrol	Spin Master	Figures, plush, toy cars (U.S., Canada, U.K., Europe)	Nickelodeon & Viacom Consumer Products (NVCP)
Peter Pan series	European & Global Licensing B.V. (EGL)	Master toy (Worldwide excl. Germany)	DQ Entertainment
PEZ Candy	JCorp	Apparel (Canada)	Lisa Marks Associates (LMA)
Pikmi Pops	Design Group U.K./IG Design Group Plc	Gift packaging, greeting cards (U.K.)	Bulldog Licensing
	Dreamtex Ltd.	Bedding (U.K.)	
	Roy Lowe & Sons Ltd.	Socks (U.K.)	
PlayStation 4	Pottery Barn Kids/PBTeen div. Williams Sonoma	Home furnishings (Americas, Asia Pacific, Monaco, Russia, Turkey, Middle East)	Sony Interactive Entertainment America
pocket.watch	Caprice Australia	Apparel (Australia)	pocket.watch
	Cooneen	Nightwear, underwear (U.K.)	
	Five Mile Press div. Bonnier Publishing Australia	Publishing (Australia)	
	Ultimate Source/Hijinx	Games (ANZ)	
	Vivid Imaginations/Vivid Toy Group	Toys (Worldwide)	
Popeye	Australia Postal Corporation – Philatelic Group	Stamps (Australia)	King Features Syndicate
	Maquila Internacional de Confeccion S.A. (MIC)	Accessories, apparel (Columbia)	
	Philcos	Knit tops, sweatshirts, t-shirts, tank tops (U.S., Canada)	
Precious Moments	Acco Brands	Planners, wall calendars (U.S., Canada)	Precious Moments
	Leap Year Publishing	Puzzles (U.S., Canada)	
	Mark Feldstein & Associates	Canvases, clocks, lanterns, night lights (U.S., Canada)	
Rae Sremmurd	Luc Belaire div. Sovereign Brands	Wine (Worldwide)	Chamber Group (The)
Risk	Ubisoft	Video games (Nintendo Switch) (North America)	Hasbro
Smiley	Michiko London Koshino	Accessories, apparel (Japan, South Korea, Hong Kong)	Smiley Company (The)/SmileyWorld
Tiny Tusks	eMook S.r.l.	Mobile book apps (Worldwide)	Edutainment Licensing
Tottenham Hotspur	New Era Cap	Headwear (Worldwide)	Tottenham Hotspur Football Club
Toy Story 4	Simba Dickie Group	Remote-controlled toys (Europe)	Disney Consumer Products
	Siso Toys U.K. div. Simba Dickie Group	Remote-controlled toys (U.K.)	
Trivial Pursuit	Ubisoft	Video games (Nintendo Switch) (North America)	Hasbro
Twilight Zone (The)	Fifth Sun Apparel	Apparel (Worldwide)	CBS Consumer Products
Twin Peaks	ALEX AND ANI	Jewelry (Worldwide)	
Warheads	Funko	Accessories, apparel, digital goods, pop vinyl figures (Worldwide)	Lisa Marks Associates (LMA)
We Bare Bears	Miniso Australia	Accessories, cosmetics, housewares, stationery, toys (ANZ)	Cartoon Network Enterprises (Asia Pacific)
WWE	Danawares	Backpacks, camping chairs, drinkware, lunch bags, puzzles, stationery (Canada)	World Wrestling Entertainment (WWE)

\*Extension or renewal.



## contacts & connections

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

**20th Century Fox Consumer Products**, Erin Morris, SVP Global Retail Business Development & Ecommerce, 310-369-1000, erin.morris@fox.com, P. 7,11.

**9 Story Brands div. 9 Story Media Group**, Kyra Halperin, VP Consumer Products, 212-764-0266 x316, kyrah@9story.com, P. 7.

**Acco Brands**, Jenny Matthews, Licensing Account Manager, 937-495-5146, jenny.matthews@acco.com, P. 10,12.

**ACI Licensing**, Jennifer Case, VP, 310-956-3595, jcase@acilicensing.com, P. 8.

**Active Brand Commerce**, Stephanie Gonzalez, Director Licensing, 818-917-5966, stephg@activebrandcommerce.com, P. 8.

**Activision Blizzard**, Johanna Faries, Head Product Call of Duty World League, 310-496-5269, johanna.faries@activision.com, P. 23.

**adidas Group North America**, Zion Armstrong, President, 971-234-2300, zion.armstrong@adidas.com, P. 9.

**Aerogarden/AeroGrow Intl. Inc.**, John Thompson, EVP, 303-444-7755, john@aerogrow.com, P. 7.

**ALEX AND ANI**, Colleen Fugere, VP Licensing & Sponsorships, 401-633-1486, colleen@alexandani.com, P. 12.

**Alita's Brand Bar**, Alita Friedman, CEO, 732-319-0502, alita@alitasbrandbar.com, P. 10.

**American Exchange Group**, 212-287-9001, sales@axnygroup.com, P. 8.

**Aquarius Entertainment Merchandising**, Linda Judy, VP Licensing & Business Development, 559-561-4577, linda@aquariusimages.com, P. 9.

**Asmodee North America**, Simone Elliott, Licensing Department, 651-639-1905 x139, licensingdept@asmodeena.com, P. 7.

**ASO LLC**, Charles Hart, VP Sales & Marketing, 941-379-0300, chart@asocorp.com, P. 7.

**Ata-Boy**, Jude Albright, CFO, 323-644-0117 x201, jalbright@ata-boy.com, P. 7.

**Authentic Brands Group (ABG)**, Jamie Salter, Chairman & CEO, 212-760-2412, jsalter@abg-nyc.com, P. 3.

**B.U.M. Equipment**, Stephen Wayne, Chairman, 917-520-9600, bumlicensing@gmail.com, P. 7.

**Bare Tree Media**, Robert Ferrari, CEO, 617-899-3347, rferrari@baretreemedia.com, P. 10,12.

**Bark (BarkBox)**, Dave Stangle, Director Brand Partnerships, 855-520-2275, dave@barkbox.com, P. 7.

**Beanstalk**, Debra Restler, SVP Business Development & Marketing, 212-303-1146, debra.restler@beanstalk.com, P. 23.

**Beanstalk Icon Representation**, Martin Cribbs, VP Brand Management, 212-303-1139, martin.cribbs@beanstalk.com, P. 10.

**Beats By Dr. Dre**, Omar Johnson, Chief Marketing Officer, 424-268-3055, ojohnson@apple.com, P. 11.

**Bentex Group**, Susan Peia, EVP Licensing, 212-594-4250 x2825, susan@bentex.com, P. 9.

**Bioworld Merchandising**, Jennifer Staley, VP Licensing, 972-488-0655, jennifers@bioworldmerch.com, P. 10.

**Bixler**, 610-821-8641, info@bixlers.com, P. 8.

**Blair O'Neal c/o 464 Sports Management**, Jeff Keiser, Director, 480-812-5890, jeffkeiser@464sports.com, P. 10.

**Bonnier**, Elise Contarsy, SVP Consumer Products, 212-779-5545, elise.contarsy@bonniercorp.com, P. 23.

**BOOM! Entertainment/BOOM! Studios, Inc.**, Lance Kreiter, VP Licensing & Merchandising, 323-617-4124, lkreiter@boom-studios.com, P. 7.

**BoxLunch**, Robert Thomsen, SVP Merchandising & Marketing, 626-839-4681 x2216, rthomsen@hottopic.com, P. 7.

**Bradford Exchange**, Maura Kelly, VP Licensing & Art Acquisition, 847-581-8200, maura.kelly@bgeltd.com, P. 10.

**Brand and Blend**, Sarah Benson, Partner, 310-953-9647, sarah@brandandblend.com, P. 11.

**Brand Liaison (The)**, Steven Heller, Founder, 855-843-5424, steven@thebrandliaison.com, P. 7-9.

**Brandgeniuity**, Jay Asher, Partner, 212-925-0730, jay@brandgeniuity.com, P. 10.

**Bravado Intl. Group div. Universal Music Group**, Joe Marziotto, VP Brand Marketing The Beatles, 212-445-3432, joe.marziotto@bravado.com, P. 9.

**BrownTrout Publishers**, Mike Brown, CEO & President, 800-777-7812, mbrown@browntrout.com, P. 12.

**Bruce Lee Enterprises**, Sydnie Wilson, Director Licensing, 310-287-2100, sydnie@brucelee.com, P. 10.

**BuzzFeed Media Brands**, Ben Kaufman, Head Commerce, 212-431-7464, ben.kaufman@buzzfeed.com, P. 7.

**C-Life Group**, Connie Chang, Director Licensing, 212-294-0248, connie@c-lifegroup.com, P. 9.

**C&D Visionary**, David Silverman, President, 800-426-9947 x104, david@cdmerch.com, P. 9.

**Calendar Holdings/Calendars.com/Go! Retail Group**, Jennifer Schubert, VP Merchandising, 512-369-6133, jenns@calendars.com, P. 8.

**Candlewick Press/Candlewick Entertainment**, Mary McCagg, Director Licensing, 617-661-3330, mary.mccagg@candlewick.com, P. 11.

**Cartoon Network Enterprises**, Peter Yoder, VP Cartoon Network Enterprises, 212-275-6535, peter.yoder@turner.com, P. 7.

**CBS Consumer Products**, Bill Burke, SVP Marketing, 212-975-7537, bill.burke@cbs.com, P. 3.

**CBS Consumer Products**, Veronica Hart, SVP Licensing & Consumer Products, 212-975-6894, veronica.hart@cbs.com, P. 7,8,10-12.

**Centric Brands (form. Differential Brands Group)**, Anurup Pruthi, CFO, 646-582-6000, info@centricbrands.com, P. 23.

**Chamber Group (The)**, Kasturi (Kaz) Shan, Brand & Publicity Manager, 212-366-5801, kasturi@thechambergroup.com, P. 12.

**Church & Dwight**, Tammy Talerico-Payne, Director Licensing, 609-806-1495, tammy.talerico@churchdwight.com, P. 7.

**Color Bars**, Andrew Netkin, andrew.netkin@gmail.com, P. 10.

**Commonwealth Toy & Novelty**, Alec Kessler, EVP, 212-242-4070, akessler@cwt-ny.com, P. 11.

**Con\*Quest Journals**, Shelley Harper, Co-creator & Co-owner, 317-294-1567, shelley@conquestjournal.com, P. 7.

**Conair/Cuisinart**, Ellen Slicklen, VP Global Licensing, 203-975-4600, ellen\_slicklen@conair.com, P. 7.

**CozyPhones/Halo Acoustic Wear**, Paul Miller, CEO, paul@haloacousticwear.com, P. 7,8.

**Cra-Z-Art**, Nellie Mahabir, CEO, 973-598-3800 x208, nmahabir@cra-z-art.com, P. 7.

**Crayola**, Warren Schorr, VP Business Development & Global Licensing, 610-253-6271 x4723, wschorr@crayola.com, P. 10.

**Creative Covers for Golf**, Stan Denenberg, Director Business Development & Licensing, 508-429-1509, stan@creativecoversforgolf.com, P. 10.

**Cubicall**, Anthony Pucci, CEO & Co-founder, 818-319-4200, info@cubicallbooth.com, P. 8.

**Custom Personalization Solutions (CPS)**, Michael Tabakin, SVP, 973-420-8070, mtabakin@cpscompany.com, P. 7.

**Danielle Nicole**, Danielle DiFerdinando, CEO & Designer, 212-947-9001, info@danielle-nicole.com, P. 11.

**DGK**, Stevie William, CEO & Co-owner, 760-918-0405, stevie@thekayocorp.com, P. 10.

**Disney Consumer Products**, Josh Silverman, EVP Global Licensing, 818-544-0567, josh.silverman@disney.com, P. 7,9,11,12.

**Disney Consumer Products**, Paul Gitter, SVP Licensing Marvel, 818-544-1950, paul.gitter@disney.com, P. 8.

**Disney Consumer Products**, Paul Southern, SVP Licensing Star Wars, 415-623-1928, paul.southern@lucasfilm.com, P. 8.

**Dr. Seuss Enterprises L.P.**, Susan Brandt, President, 858-459-9744, susanb@drseuss.com, P. 11.

**DreamWorks Animation**, Ann Buckingham, VP Global Licensing Softlines & Product Development, 818-695-5000, ann.buckingham@dreamworks.com, P. 11.

**Dynamite Entertainment**, Rich Young, Director Business Development, 856-312-1040 x107, rich.young@dynamite.com, P. 7.

**Ecell Global Ltd.**, Cem Celikkol, CEO & Co-founder, 888-509-0294, gemc@ecellglobal.com, P. 7.

**Elmer Candy Corp.**, Michael Sitarz, VP Sales & Marketing, 985-386-6166, msitarz@elmercandy.com, P. 9.

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**contacts & connections** *Continued from page 13*

**Endemol Shine North America**, Tamaya Petteway, SVP Brand & Licensing Partnerships, 747-529-8147, tamaya.petteway@endemolshine.us, P. 7,8.

**Epic Games**, Matthew Weissinger, Director Marketing, 919-854-0070, matthew.weissinger@epicgames.com, P. 6.

**Epic Rights**, Lisa Streff, EVP Global Licensing, 310-424-1908, lisa@epicrights.com, P. 7,9,10-12.

**Epic Rights**, Meghan Mernin, Director Licensing, 310-424-1909, megan@epicrights.com, P. 9-11.

**Epoca Intl.**, John Haley, VP National Accounts, 561-353-3900, info@epoca.com, P. 7.

**Evolution USA**, Travis Rutherford, President Licensing & Retail, Chief Revenue Officer, 818-501-3186, travis@evomgt.com, P. 9.

**Fabletics div. TechStyle/JustFab**, Ron Harries, VP Retail, 866-337-0906, rharries@fabletics.com, P. 6.

**Feld Entertainment**, Jeff Bialosky, VP Licensing & Retail Development, 703-749-5513, jbialosky@feldinc.com, P. 3.

**Fifth Sun Apparel**, Kelly Schulman, VP Licensing, 530-343-8725, kschulman@5sun.com, P. 10-12.

**Firefly Brand Management**, Cynthia Modders, President & CEO, 415-513-5826, cynthia@fireflybrandmanagement.com, P. 8.

**Forecast Agency (The)**, Brandon Thrush, Licensing Manager, 323-810-2388, team@theforecastagency.com, P. 7,10,11.

**Forever 21**, Linda Chang, VP Merchandising, 213-741-5100, linda.c@forever21.com, P. 11.

**Fred Rogers Productions (form. Fred Rogers Co.)**, Micah Southwood, Licensing Manager, 412-291-8811, southwood@fredrogers.org, P. 3.

**Funko**, Brian Mariotti, President & CEO, 425-783-3616, brian@funko.com, P. 12.

**Funko**, Lauren Winarski, Senior Licensing & Brand Manager, 425-783-3616 x173, lauren@funko.com, P. 11.

**Funko**, Matt Lattier, Assistant Manager Brand & Licensing, 425-783-3616, matt@funko.com, P. 10,12.

**FYE div. Trans World Entertainment**, Jodie Evans, SVP Entertainment Merchandising & Marketing, 518-452-1242 x7775, jevans@twec.com, P. 8.

**Galleria Enterprises**, Tony Margulis, Owner, 646-416-6683, tony.margulis@galleria-us.com, P. 9.

**GameLoft**, Baudouin Corman, EVP Sales & Marketing, 415-547-4014, baudouin.corman@gameoft.com, P. 10,11.

**H3 Sportgear**, Janet Sarchett, Director Licensing & Business Development, 704-921-4785 x102, jsarchett@h3sportgear.com, P. 9.

**Haddad Brands**, Ruth Walnick, SVP, 212-630-3100, ruthw@haddad.com, P. 10.

**Handcraft Manufacturing**, Marshall Mizrahi, VP, 212-251-0022, marshallm@handcraftmfg.com, P. 7.

**Hang Ten**, Denise Setton, Director Licensing, 917-692-4854, dsetton@hangtengold.com, P. 8.

**Harry & David LLC**, Toby Dixon, Merchandise Manager Wolferman's Bakery, 541-864-2348, tdixon@harryanddavid.com, P. 8.

**Hasbro**, Bill Burch, Director Licensing, 401-431-8697, bill.burch@hasbro.com, P. 11,12.

**HBO**, Jeff Peters, VP Licensing & Retail, 212-512-5250, jeff.peters@hbo.com, P. 11.

**Hot Topic**, Cindy Levitt, VP General Merchandise Manager, 626-839-4681 x2216, clevitt@hottopic.com, P. 7.

**IDW Games div. IDW Media Holdings**, Jerry Bennington, VP New Product Development, 858-270-1315, jerry@idwpublishing.com, P. 8.

**Jada Toys**, Jason Richman, Senior Licensing Manager, 626-810-8382, jasonr@jadatoys.com, P. 10.

**JAKKS Pacific**, Tara Hefter, SVP Global Licensing, 424-268-9549, thefter@jakks.net, P. 7.

**Jazwares**, Laura Zebersky, CCO & EVP Global Sales/Licensing, 954-845-0800, laura@jazwares.com, P. 8.

**Jim Henson Co.**, Shane Mang, Executive Director Global Consumer Products, 323-802-1500, smang@henson.com, P. 11.

**Joester Loria Group (JLG)**, James Slifer, SVP Business Development, 212-683-8548, jslifer@tjlg.com, P. 7,8.

**Junk Food Clothing**, Angela Feliciano, Licensing, 310-445-7776, licensing@junkfoodclothing.com, P. 9.

**Just Funky**, Angela Hoyer, Licensing Department Manager, 234-249-0145 x212, angela.hoyer@justfunky.com, P. 10.

**King Features Syndicate**, Carla Silva, VP, GM & Global Head Licensing, 212-969-7582, csilva@hearst.com, P. 7,9,10,12.

**King Ice**, Cuong Diep, Co-owner, 626-339-3642, sales@kingice.com, P. 10.

**KnuckleBonz, Inc.**, Ashley Simerman, VP Marketing & Operations, 800-638-4180 x82, ashley@knucklebonz.com, P. 9.

**Leap Year Publishing**, Lisa Ryan, Sales & Licensing Manager, 978-688-9900, lisar@leapyearpublishing.com, P. 12.

**Learfield Licensing Partners**, Bob Bernard, President & CEO, 317-669-0808, bbernard@learfieldlicensing.com, P. 8.

**Leisure Growth Holdings**, Christopher Palumbo, Brand Strategist, 305-277-7772, chris.p@leisuregrowth.com, P. 8.

**Levi Strauss**, Karen Leslie, Director Global Licensing, 415-501-7019, kleslie@levi.com, P. 3,11.

**Libertine**, Johnson Hartig, Owner, 323-848-4918, info@ilovelibertine.com, P. 7.

**Licensing Works!**, Leslie Levine, Owner & Founder, 702-485-5677, leslie@licensingworks.us, P. 9.

**Lisa Marks Associates (LMA)**, Lisa Marks, President, 914-933-3900, lmarks@lma-inc.com, P. 8,9,11,12.

**Loot Crate**, Mutsumi Miyazaki, Head New Business Development & Licensing, 323-999-5353, mutsumi.miyazaki@lootcrate.com, P. 7.

**Luc Belaire div. Sovereign Brands**, Brett Berish, President & CEO, 212-343-8366, brettberish@sovereignbrands.com, P. 12.

**Macmillan Publishing**, Stephanie Barton, Publisher Children's Books, 646-307-5151, stephanie.barton@macmillan.com, P. 11.

**Magic Jump**, Michael Berreth, VP Marketing, Licensing & Business Development, 818-847-1313 x117, michael@magicjump.com, P. 7,8.

**Malibu Shirts**, Zen Yuvienco, Director Finance & Business Operations, 818-865-8945, zen@malibushirts.com, P. 10.

**Mark Feldstein & Associates**, Mark Feldstein, President, 419-867-9500, mark@mfagifts.com, P. 12.

**MGM Resorts Intl.**, Lance Evans, VP Marketing Entertainment & Sports, 702-693-7300, levans@mgmresorts.com, P. 6.

**MHS Licensing + Consulting**, Marty Segelbaum, President, 952-544-1377 x202, marty@mhslicensing.com, P. 9.

**MJC Intl. Group**, Mark Siegel, SVP Licensing & Business Development, 415-467-9500 x112, mark.siegel@gomjc.com, P. 9.

**National Aeronautics & Space Administration (NASA)**, Burt Ulrich, Communications, 202-358-0001, bert.ulrich@nasa.gov, P. 11.

**National Entertainment Collectibles Association (NECA)**, Joel Weinshanker, President, 908-686-3300 x206, joelw@necaonline.com, P. 11.

**New Era Cap**, Christopher Koch, CEO, 716-549-0445, chrisk@neweracap.com, P. 8,12.

**NFL**, Jennifer Gray, Director Licensing, 212-450-2000, jennifer.gray@nfl.com, P. 6.

**NFL Players Inc. (NFLPA)**, Steve Scebelo, VP Licensing & Business Development, 202-572-7472, steven.scebelo@nflpa.com, P. 6.

**Nickelodeon & Viacom Consumer Products (NVCP)**, Pam Kaufman, President Consumer Products & CMO, 212-258-7500, pamelka.kaufman@nick.com, P. 7,8,12.

**Nickelodeon & Viacom Consumer Products (NVCP)**, Sharon Cohen, EVP Partnership Marketing Kids & Family Group, 212-846-8000, sharon.cohen@nick.com, P. 8.

**Nixon**, Michael Marckx, VP Licensing, 760-944-0900, michael.marckx@nixon.com, P. 11.

**NobleWorks**, Ron Kanfi, President & Creative Director, 201-420-0095, rkanfi@nobleworksinc.com, P. 7.

**Novomatic Americas**, Rick Reitzler, President Americas Sales, 224-802-2974, rreitzler@novomaticamericas.com, P. 11.

**Outright Games**, Terry Malham-Wallis, Business Development & Licensing, 949-589-4900, info@outrightgames.com, P. 10.

**Party City Holdings**, Bill Furtkevic, VP Marketing, 914-784-4171, bfurtkevic@partycity.com, P. 7.

**Perry Ellis Intl./PEI Licensing**, Maria Folyk-Kushneir, SVP Licensing, 305-873-1331, maria.folyk-kushneir@perry.com, P. 3.

**pocket.watch**, Hanna Sheinin, Director Global Licensing, 424-298-8234, hanna@pocket.watch, P. 12.

**Pottery Barn Kids/PBTeen div. Williams Sonoma**, Jennifer Kellor, President, 415-421-7900, jkellor@wsqc.com, P. 12.

**Precious Moments**, Mary Theis, Licensing Manager, 847-725-9400, mary.theis@preciousmoments.com, P. 12.

**Pressman Toy/Goliath Games**, Sarah Pousho, VP New Business Development, 214-295-2953, sarahp@goliathgames.com, P. 3.

**Print All Over Me (PAOM)**, Jesse Finkelstein, CEO, Creative Director & Co-founder, 212-696-0765, jesse@printallover.me, P. 8.

**Prominent Brand + Talent**, Daniel Levin, Principal, 310-918-1500, levin@prominentglobal.com, P. 10.

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## contacts & connections *Continued from page 14*

**Rag & Bone**, Stephanie Strack, CEO, 212-982-3992, stephanie.strack@rag-bone.com, P. 11.

**Reef div. VF Outdoor**, Paloma Martin Del Campo, Legal Manager, 760-431-2381, paloma\_delcampo@vfc.com, P. 7.

**Retail Monster Brand Extension & Licensing Co.**, Michael Connolly, Founder & CEO, 844-365-2726, m.connolly@retailmonster.com, P. 7.

**Rhino Entertainment div. Warner Music Group**, Mark Pinkus, President, 818-238-6100, mark.pinkus@wmg.com, P. 11.

**Rio Bravo Brewing Co.**, Denise Baker, Co-owner & Director Business Development, Marketing, 505-900-3909, denise@riobravobrewing.com, P. 8.

**Ripple Junction**, Scott Morton, Licensing Director, 513-559-3900, smorton@ripplejunction.com, P. 11.

**Rockin Pins**, Mauricio Alvarado, CEO, 562-639-0973, rockinpins@gmail.com, P. 9,10.

**RockLove Jewelry**, Allison Hourcade, Owner, info@rocklove.com, P. 10.

**Roundhouse Displays**, Shawn Allen, Owner, 919-330-5590, P. 8.

**Royal Bobbles**, Warren Royal, President, 770-781-0844, wroyal@royalbobbles.com, P. 10.

**Royal Touch (The)**, Bill Schwartz, CEO, 310-394-8227, bill@schwartzcompany.com, P. 8.

**Silver Screen Bottling Co.**, Leslie Buhler, Director Licensing, leslie@silverscreenbottling.com, P. 10.

**Simon & Schuster Children's Publishing**, Valerie Garfield, VP, Publisher, Novelty & Licensed Publishing, 212-698-7000, valerie.garfield@simonandschuster.com, P. 11.

**Siscoverers**, John Christiansen, VP, 763-789-0956, info@siscovers.com, P. 9.

**Snap**, Jeremi Gorman, Chief Business Officer, 347-570-5346, jeremi.gorman@snap.com, P. 23.

**Sonic Drive-In**, Darin Dugan, VP National Marketing, 405-255-5000, darin.dugan@sonicdrivein.com, P. 7.

**Sony Interactive Entertainment America**, Asad Qizilbash, VP Marketing, 650-655-8000, asad\_qizilbash@playstation.sony.com, P. 12.

**Sony Pictures Consumer Products**, Jamie Stevens, EVP Global Consumer Products & Licensing, 310-244-4000, jamie\_stevens@spe.sony.com, P. 8.

**Spotlight Licensing & Brand Management**, Carole Postal, President, 212-947-5958, carole@spotlightlicensing.com, P. 7,10.

**Stans USA div. American Made Manufacturing**, 786-534-7884, info@ammfr.com, P. 10.

**Stern Pinball**, Gary Stern, Chairman & CEO, 708-345-7700, gary.stern@sternpinball.com, P. 9.

**Surreal Entertainment**, Mike Heidelman, Sales, 330-202-0644, mike.heidelman@surreal-entertainment.com, P. 7,8.

**Target**, Gaye Dean, Marketing Director, 612-696-8326, gaye.dean@target.com, P. 7.

**Think Geek**, Donna Bruschi, Director Licensing, 703-293-6299, dbruschi@thinkgeek.com, P. 7.

**Topix Media Lab Publishing**, Tony Romando, CEO & Co-founder, 646-449-8597, tony@topixmedia.com, P. 10.

**Trends International**, Meagan Swinney, Licensing Manager, 317-388-1212, jloeser@trendsinternational.com, P. 9,10.

**True Religion Apparel**, Tara Peyrache, CMO, 323-266-3072, tara.peyrache@truereigion.com, P. 11.

**U.S. Polo Assn./USPA Global Licensing**, Molly Robbins, VP Global Licensing, 561-373-5317, mrobbins@uspagl.com, P. 6.

**Ubisoft**, Tony Key, SVP Marketing & Sales, 415-547-4000, tony.key@ubisoft.com, P. 11,12.

**Ultimate Source/Hijinx**, Jeff Jarka, 630-861-2126, jeff.jarka@ultimatesource.com, P. 12.

**Universal Brand Development**, Cindy Chang, SVP Consumer Products, Partnerships & Licensing, 818-777-2067, cindy.chang@nbcuni.com, P. 7.

**Universal Brand Development**, Vince Klaseus, President, 818-777-1000, vince.klaseus@nbcuni.com, P. 3.

**Vandale Industries**, Gary Kallman, VP Sales, 212-683-8181, gkallman@vandale.com, P. 7.

**Vans**, Jennifer Dirks, Senior Manager Global Intellectual Properties & Brand Enforcement, 714-889-3209, jenny\_dirks@vfc.com, P. 11.

**Varsity Spirit**, John Newby, EVP Corporate Partnerships, jnewby@varsity.com, P. 6.

**Viacom Group**, Steve Raizes, SVP Audio/Video, Consumer & Experiential Products, 212-258-6000, steve.raizes@mtvn.com, P. 9.

**Warner Bros. Consumer Products**, Amit Desai, EVP Business & Marketing Strategy - DC Div., 818-954-3000, amit.desai@warnerbros.com, P. 8.

**Welspun U.S.A.**, Julie McKenzie, CEO, 212-620-2000, contact@welspunusa.com, P. 7.

**Wilcox Enterprises/Indigo Falls**, Jay Wilcox, Owner, 952-472-5411, P. 9.

**Wildcat Retro Brands**, Cassidy Moore, VP Marketing & Licensing, 323-583-4508, cassidy@wildcatretrobrands.com, P. 9.

**Wildflower Group (The)**, Michael Carlisle, Principal, 212-924-2322, michael@thewildflowergroup.com, P. 8,11.

**World Wrestling Entertainment (WWE)**, Scott Halpern, Director Licensing North America, 203-353-5062, scott.halpern@wwecorp.com, P. 8,12.

**York Wallcoverings & RoomMates**, Nicole Zeigler, Licensing Manager, 717-846-4456, zeiglern@yorkwall.com, P. 7.



## international contacts & connections

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

**Absolute Garments**, Daryl Khan, Director, 44 203 141 8120, daryl@absolutegarments.com, P. 10.

**Active Merchandising**, Anita Van Esch, Owner & MD, 49 211 52 06 47 86, anita.vanesch@activemerchandising.de, P. 9.

**Australia Postal Corporation – Philatelic Group**, Louisa Carroll, Marketing & Promotions Manager, 61 3 9887 0033, louisa.carroll@auspost.com.au, P. 12.

**BBC Worldwide**, Rikesh Desai, Director Licensing, 44 20 8433 2000, rikesh.desai@bbc.com, P. 11.

**BlissHome Ltd.**, Gabrielle Bliss, Director, 44 1789 4000 77, hello@blisshome.co.uk, P. 11.

**Blitzway Co., Ltd.**, DongJun Im, 82 70 4045 7692, junis210@gmail.com, P. 10.

**Bloomsbury Publishing**, Georgia Fuller, Intl. Rights, 44 20 7631 5600, rights@bloomsbury.com, P. 11.

**Boat Rocker Rights div. Boat Rocker Media**, Caroline High, Director Licensing, 44 203 746 0850, caroline@boatrocker.com, P. 9.

**Boots U.K.**, Elizabeth Fagan, SVP, MD Intl. Retail, 44 345 070 8090, elizabeth.fagan@wba.com, P. 11.

**Build-A-Bear Workshop Europe**, Roger Parry, Senior MD, 44 0800 542 0635, rogerp@buildabear.com, P. 11.

**Bulldog Licensing**, Vicky Hill, Licensing Director, 44 20 8325 5455, vickyh@bulldog-licensing.com, P. 12.

**C's Century Promotion**, Atsushi Ikishita, Director, 81 03 6805 1040, info@cscenurypro.com, P. 10.

**Canada Goose**, Dani Reiss, President & CEO, 416-780-9850, dreiss@canada-goose.com, P. 6.

**Caprice Australia**, Annelies Van Doorn, Licensing Manager, 61 3 9922 2500, avandoorn@caprice.com.au, P. 12.

**Caroline Mickler**, Caroline Mickler, Licensing Agent & Consultant, 44 208 392 2439, caroline@carolinemicklerltd.co.uk, P. 11.

**Carte Blanche Greetings**, Sarah Quigley, Head Licensing, 44 1243 792600, sarah.quigley@cbg.co.uk, P. 11.

**Cartoon Network Enterprises (Asia Pacific)**, Vikram Sharma, VP, 852 3128 3600, vikram.sharma@turner.com, P. 12.

**Casual Dining Group**, James Spragg, COO, 44 20 7121 3200, james.spragg@casualdininggroup.com, P. 9.

**Centa IP**, Gail Mitchell, CEO Global, gail.mitchell@centaip.com, P. 9.

**Cooneen**, 44 28 8952 1401, info@cooneen.com, P. 12.

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**contacts & connections** *Continued from page 15*

- Corus Entertainment/Nelvana Enterprises**, Pam Westman, Head Nelvana Enterprises, 416-479-6094, pam.westman@corusent.com, P. 9.
- CPLG (France)**, Clementine Goutaine, Director Marketing & Retail, 33 1 44 09 01 01, cplginfo@fr.cplg.com, P. 8.
- CPLG (Turkey/Greece)**, 30 210 942 7610, cplginfo@it.cplg.com, P. 8.
- CPLG (U.K.)**, Peter Byrne, CEO, 44 20 8563 6107, peter.byrne@cplg.com, P. 8.
- Dairy Crest**, Anca Lazar, Senior Brand Manager, 44 1372 472200, anca.lazar@dairycrest.co.uk, P. 12.
- Danawares**, Lisa Steinberg, Director Licensing, 514-342-5555 x141, lisas@danawares.com, P. 9,12.
- Design Group U.K./IG Design Group Plc**, Lance Burn, Executive Director, 44 1525 887310, lburn@thedesigngroup.com, P. 12.
- DQ Entertainment**, Tapaas Chakravarti, Owner, 91 40 2355 3726, tapaas@dqentertainment.com, P. 11,12.
- Dream Theatre Pvt. Ltd.**, Jiggy George, Founder & CEO, 91 22 2411 5579, jiggygeorge@dream-theatre.co.in, P. 10.
- Dreamtex Ltd.**, Jo Duckworth, Director & Owner, 44 844 499 8465, jo@dreamtexltd.com, P. 12.
- Edutainment Licensing**, Denise Deane, Founder, denise@edutainmentlicensing.com, P. 9,12.
- eMook S.r.l.**, Silvia Festa, Graphic & Licensing Dept., 39 035 249 545, contact@emooks.net, P. 12.
- EMP Merchandising Handelsgesellschaft mbH**, Ernst Trapp, CEO, 49 591 914310, ernst.trapp@emp.de, P. 9.
- Entertainment One (eOne) - Canada**, Chris Taylor, Global President (Music), 416-309-4200, ctaylor@entonegroup.com, P. 10.
- Euro Prosem S.L.**, Martin Vazquez Bano, General Director, 34 982 585 917, europrosem@europrosem.com, P. 10.
- EuroGraphics**, Federico Pilotto, Director Product Development, 514-939-0310, federico@eurographics.ca, P. 11.
- European & Global Licensing B.V. (EGL)**, Bram Halters, CEO, 31 10 529 88 24, bram@eglbv.com, P. 11,12.
- Factory Rights/Factory Create**, Anya Hollis, Head Brand Licensing, 44 161 929 6755, interest@factorycreate.com, P. 12.
- Five Mile Press div. Bonnier Publishing Australia**, Tanya Swan, Senior Key Account Manager, 61 3 8756 5500, tonyg@fivemile.com.au, P. 12.
- goGame (subs. Sega)**, David Ng, CEO & Founder, 65 6802 8288, partners@gogame.net, P. 8.
- Good Smile Company, Inc.**, Takanori Aki, CEO, overseas@goodsmile.jp, P. 10.
- Half Moon Bay**, Etta Saunders, Head Licensing & Product Development, 44 1225 473873, ettas@halfmoonbay.co.uk, P. 12.
- Hengxin Shambala Culture Co., Ltd. (HSK)**, 86 10 88846666, office@hxgro.com, P. 9.
- IconLogin Ltd.**, Schehrezade Davidson, CEO, 44 7956 329510, schehrezade.davidson@iconlogin.com, P. 10.
- IPR Licensing**, Sarah Dixon, Joint MD, 44 1491 652271, sarah.dixon@iprlicensing.co.uk, P. 9.
- JCorp**, Priscilla Pacheco, VP Licensing, Merchandising & Sales, 514-384-3872, lerner@jcorp.ca, P. 11,12.
- Joe Books Ltd.**, Steffie Davis, Publishing Manager, 416-537-1020, info@joebooks.com, P. 10.
- JW Brand Consulting**, Jason Wang, Director, jason@jwbrand.com.au, P. 9.
- KD UK**, 44 1727 827194, ukinfo@kd-group.com, P. 10.
- Lazy Oaf**, Gemma Shiel, Founder, CEO & Creative Director, 44 20 7354 2500, gemma@lazyoaf.com, P. 10.
- Licencias Mexicanas**, Albert Rose, VP Licensing, 52 442 225 3011, albert@licenciasmexicanas.com, P. 8.
- Licensing Essentials**, Scott Bingley, MD, 61 3 9754 0754, scott@licensingessentials.com.au, P. 9.
- Lotus Global Marketing (Brazil)**, Glenn Migliaccio, Senior Manager Brand Strategy & Planning, 55 11 3065-0400, marketing@lotusglobalmkt.com, P. 11.
- Ludia**, Alex Thabet, President & CEO, 514-313-3370, business@ludia.com, P. 10.
- Manchester United Merchandising**, Richard Arnold, Group MD, 44 70 874 2442, richard.arnold@muml.co.uk, P. 11.
- Maquila Internacional de Confeccion S.A. (MIC)**, 57 350 316 72 00, info@mic.com.co, P. 12.
- Mattel U.K. Ltd.**, Trinity Smith, Licensing Manager Regional U.K. & EMEA, 44 1628 500 000, trinity.smith@mattel.com, P. 9.
- Merchantwise**, Rosalie May, Brand Manager May Gibbs, 61 3 9520 1000, rosalie@merchantwise.com, P. 11.
- Michiko London Koshino**, 44 207 328 7555, info@michikokoshino.co.uk, P. 12.
- Miniso Australia**, Ben Yip, CEO, benyip@miniso-au.com, P. 12.
- Moose Toys**, Nicole Hardiman, Senior Licensing Manager, 61 3 9579 7377, nicole.hardiman@moosetoys.com, P. 3,10.
- Nickelodeon & Viacom Consumer Products (NVCP)**, Marianne James, VP Commercial Partnerships, Consumer Products & Experiences UK & Ireland, 44 20 3580 2000, marianne.james@vimmn.com, P. 12.
- Northcott Silk**, Deborah Edwards Northcott, Design Director, 905-760-0072, deborah.edwards@northcott.net, P. 9.
- Nununu**, Erez Baruch, CEO, 972 54 6878077, erez@nununuworld.com, P. 10.
- One Animation**, Will Ocha, Intl. Licensing Director, 65 6273 1785, will@oneanimation.com, P. 8.
- Osprey Games**, 44 1865 727022, info@ospreypublishing.com, P. 11.
- Pentland Brands**, Katrina Nurse, CFO, 44 20 8346 2600, knurse@pentland.com, P. 23.
- Philcos**, George Meyer, VP Business Development, 905-568-1823, gmeyer@philcos.com, P. 9,10,12.
- Posh Paws Intl. Ltd.**, Laura Bull, Marketing Manager, 44 1268 567 317, lbull@poshpawsinternational.co.uk, P. 11.
- Rights & Brands**, 46 8 5244 044 049, info@rightsandbrands.com, P. 11.
- Rocket Licensing**, Rob Wijeratna, Joint MD, 44 20 7207 6242, rob@rocketlicensing.com, P. 8.
- Rovio Entertainment**, Alexandre Pelletier-Normand, EVP Games Business Unit, 358 40 667 1984, alexandre.pelletier-normand@rovio.com, P. 23.
- Roy Lowe & Sons Ltd.**, Martin Lowe, MD, 44 1623 441144, martin@roylowe.co.uk, P. 12.
- Sanrio Global Ltd.**, Alison Green, Director Brand & Creative Services, agreen@sanriolicense.com, P. 11.
- Segal Licensing**, Stuart Pollock, President, 416-545-5589, stuart.pollock@segallicensing.com, P. 9.
- Simba Dickie Group**, Michael Sieber, CEO, 49 911 9765172, m.sieber@simba-dickie.com, P. 12.
- Siso Toys U.K. div. Simba Dickie Group**, Mayur Pattni, Head Marketing & Licensing, 44 1274 765030, mayur.pattni@simbasmob.com, P. 12.
- Skinnydip London**, Richard Gold, Co-founder & Director, 44 20 8795 2706, richard@skinnydipplondon.com, P. 11.
- Skywind Group/Skywind Holdings**, Lucy Berry, In-house Legal Counsel, 44 3300887962, lucy.berry@skywindgroup.com, P. 10.
- Smiley Company (The)/SmileyWorld**, Nicolas Loufrani, CEO, 44 20 7378 8231, nico@smiley.com, P. 12.
- Spin Master**, Adam Beder, EVP Global Licensing & Business Affairs, 416-364-6002 x2256, adamb@spinmaster.com, P. 12.
- Spin Master U.K.**, Simone Palombi, Brand Manager, 44 1628 535000, simonep@spinmaster.com, P. 11.
- Start Licensing**, Ian Downes, Director, 44 208 337 7958, ian@startlicensing.co.uk, P. 11.
- Sulamericana Fantasias**, Henrique Marcio "Kiko" Smitas, President, 55 11 3611 9455, kiko@sulamericana.com.br, P. 11.
- TabTale**, Elinor Schops, Head Licensing, Business Development & Communications, elinors@tabtale.com, P. 10.
- TB International GmbH**, Heike Becht, MD, 49 6154 57 40 20, info@urban-classics.net, P. 10.
- TDP Textiles**, Dean Greasley, Director Licensing, 44 1283 550400, dean@tdptex.com, P. 11.
- Tesco**, 44 1992 632222, enquiries@tesco.com, P. 9.
- Those Licensing People (TLP)**, Leah Dever, Licensing Manager, 44 845 901 1657, leah@thoselicensingpeople.com, P. 9.
- Toho Co., Ltd. (Intl.)**, Keiji Ota, Director & Chief Godzilla Officer, 81 3 3591 5044, k\_ota@toho.co.jp, P. 3.
- Tottenham Hotspur Football Club**, Gary Jacobson, Brand Licensing Manager, 44 20 8365 5117, gary.jacobson@tottenhamhotspur.com, P. 12.
- Tycoon Enterprises (Mexico)**, Elias Fasja Cohen, President, 52 555 395 7833 x225, efasja@tycoon.mx, P. 8.
- Value Add Games**, 386 8 205 77 65, sales@valueaddgames.com, P. 9.
- Vivid Imaginations/Vivid Toy Group**, Emma Weber, Intl. Licensing Director, 44 1702 200 660, emma.weber@vividimag.co.uk, P. 12.
- Walnut Melbourne Pty. Ltd.**, Sophie Cooper, Co-founder & Director, 61 3 9427 8284, info@walnutmelbourne.com, P. 11.
- Warner Bros. Consumer Products (EMEA)**, Paul Bufton, VP Licensing & Business Development, 44 20 7984 6000, paul.bufton@warnerbros.com, P. 11.
- Woodmansterne Publications Ltd.**, Paul Woodmansterne, MD, 44 1923 200 600, paul@woodmansterne.co.uk, P. 12.

## The Language of Licensing II

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points out that automation won't work); more realistic expectations (for royalties and minimum payments—on both sides); greater collaboration (in terms of education and program support); and greater risk-taking, flexibility, and innovation in crafting deals.

Conversely, most executives feel that licensing has changed—for better (“much more collaboration going on”; “more professional”; “more open to sharing”; “larger profit opportunities”; “more equitable”)—or worse (there are so many technical constrictions that “it’s no longer fun”; “less collaborative”; “more complicated”; “robotic”; it should return to its “roots, like 6-8 years ago”).

### Tell Me What You Really Think

The role that licensing executives see licensing play in their business is varied, with 34% answering that it's additional/alternative profit generation and 35% that it is a marketing tactic. Some 18% use it to test new product categories and 15% use it to test new territories. Note that multiple responses are possible.

When asked what approach their team takes towards licensing agreements, 45% of all respondents answered that it is very restrictive/selective. A full 40% answered that “if it's not (substantially) profitable, we won't look at it,” 28% that they “like to take chances on partners,” and 21% “the more deals, the merrier.”

As they expanded on their answer, 10% of all *LoL Survey* respondents actually filled in the word “strategic.” Most were willing to “take a calculated, well thought-out risk” if they found a “good fit” between product, brand, and/or retailer. Several detailed some variation of a “quality” requirement—of the people involved, the company's credit score, or the business plan. Some specifically described the trade-off their teams take between effort and profit; they might take a chance on getting “minimal profit” if they're also required to put in only “minimal work.” A minority specified that they only worked with established, reputable licensing partners, and fewer still that they specifically consider long-term potential when choosing a partner.

Over half (52%) of *LoL Survey* respondents have seen some sort of internal changes over the last year with relation to licensing in their company. The most common of these changes was the addition of more staff, followed by a new business venture, affirming licensing as key business strategy, or hiring more agents/consultancies. Not all changes were positive, however, with some reporting downsizing or restructuring in tough business conditions.

### Working Together

When asked specifically if they felt that has collaboration between licensing partners has increased, decreased, or remained constant, 55% of licensing executives affirmed that they felt it had increased. This trend seems to be

### HOW COLLABORATION AMONG LICENSING PARTNERS HAS CHANGED, 2018

COLLABORATION	LICENSOR	LICENSEE	AGENT	OTHER	TOTAL
Increase	72%	36%	55%	64%	55%
Decrease	16%	43%	9%	27%	24%
Same	12%	21%	36%	9%	21%

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

more pronounced among smaller companies than larger ones, with companies like Amazon and Disney the most likely to tell their partners “take it or leave it.” Supportive companies are also the ones more likely to “understand the value licensing brings to their brand,” “understand the market,” and are more “consumer-focused.” The types of support most commonly cited are retail development and product/brand development as well as social media planning, marketing, and advertising support.

Just under one-fourth (24%) felt that collaboration had decreased, and 21% that it had stayed the same (on average). Just as “licensors don't support licensees as they used to,” so do “licensees no longer support brands for very long.” Of those who gave reasons as to why their own collaborative efforts have faltered, the most common was that “everyone is just understaffed” and that they get less sales and marketing support despite shouldering greater demands.

Licensors were the most likely cohort to feel that collaboration among licensing partners has increased (72% answered as such), while licensees were the least likely to think so (36%). Agents were the most prosaic group and the most likely to answer that the quality and quantity of collaborations has stayed the same (36%), or at least that there was too much variance to definitively answer one way or the other.

### Let's Start Worrying a Bit

When asked what the licensing world isn't worrying about enough, the greatest number of responses had something to do with licensing strategy (e.g., over-licensing, too much focus on the mass market, too many unrealistic expectations, lack of understanding how it fits into marketing, not enough attention on emerging brands).

This was followed by changing retail trends, including a lack of understanding on how ecommerce generally (and sometimes Amazon specifically) is going to impact licensing and how to transition into a cashless economy. Traditional retail concerns included retail compression and a rise in direct-to-retail (DTR) deals that cut out licensees and agents. An equal number of comments also related to consumer preferences—e.g., not enough focus on consumer tastes and preferences (“not one size fits all!”) including, specifically, European countries and U.S. cities.

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Unsurprisingly, the economy is another popular concern. This includes the impact of Brexit, the U.S./China tariffs (“trade war”), and the deficits of various countries, mostly the U.S. Hand-in-hand, many also worry about curbing IP abuses, including everything from counterfeiting/piracy to impermissible sub-licensing to noncompliance to small-claims enforcement of infringing activity across borders. Quality control is a critical issue as many feel that consumers are fast becoming disappointed. And of course, constantly evolving rules and regulations that “feel like a trap” and are difficult to see or predict without an (expensive) professional helping hand.

Rounding out the list, the next-most popular topics licensing executives think you’re not worrying about enough include: technology (in general, social media, payment systems), funding (private equity, high fees), and internal work culture (toxic employees, not enough time to focus on real life).

### Outdated Trends

When we asked respondents to name the top “hot trend” that they wish would just die already, we got a surprising winner: influencers. That is, social media celebrities and their silly unboxing videos and other campaigns. Next up, specific fashion trends like dad shoes or cold shoulder apparel set some others off as well as toy trends like collectibles.

We’ve never heard of the phrase “surprise and delight” (thankfully), but those who expressed disdain for the phrase may at least take comfort in the fact that they are not alone. Another marketing term that garnered more dislikes was “360 degree” marketing. Other buzzwords included blockchain/bitcoin and disrupters, start-ups, and other so-called lean companies promising to change the world on a shoestring.

Specific trends in deal-making that licensing executives are sick and tired of can be roughly divided into two categories: throwaway collaborations and over-exacting terms. The first includes cheap plastic or digital goods—“products that should not be licensed”—and licensing deals that otherwise “don’t amount to much other than a good lead” through certain industry newsletters. It also includes over-extended franchises.

The second includes the phrase “partnership” (which “just means that the licensor wants the licensee to spend money instead of them”), boilerplate advance royalties (rare,

but try telling a “licensor or agent they are the only ones of their competition” to have it in their agreements), and high-handed decrees about the amount of minimum advertising expenditure (“we don’t need to be told how much to invest”).

And, of course, we’re all sick of spam and predatory behavior.

### Social Media Blues

Over half (55%) of licensing executives use social media to drive consumer engagement and 38% use it to find and target new consumers. Another 38% use it to build professional partnerships. Despite the fact that influencers and digital celebrities are largely seen as “the hot trend that must die”, 35% of respondents work with them.

One-fifth of respondents admitted that they are “not that good at” using social media (22%) to connect with either other businesses or consumers. A larger share think they don’t use it enough (44%), but practically no one thinks that they use it too much (1%). One respondent summed up the general refrain: “It’s easy to enter any of these platforms, but very time consuming to develop meaningful strategies.”

Note that these figures are taken as a share of total responses and are somewhat depressed because some respondents noted that they are either restricted from using social media by their clients/brands or otherwise do not work with consumers.

When asked which platforms they use, the most commonly mentioned platforms were Facebook and Instagram (26% each, taken as a percent of total mentions) and Twitter and Pinterest (13% each), followed by custom-built platforms (both B2B and B2C), blogs, LinkedIn, and PopJam (4% each). Naturally, each platform has its own strengths with Facebook and Twitter the top contenders for customer service and Instagram and Pinterest for content. But it’s far from universal and social media tactics can “vary dramatically” depending on the brand, the business, and the fan base.

### Is Licensing a Business or an Industry?

Unlike two years ago, respondents don’t seem to really care one way or the other if we say either “licensing/licensing business” or “licensing industry.” Overall, 52% prefer using the term *industry* while 44% prefer *business*—factoring in neutral responses, *industry* slightly overtakes *business* at 94% share compared to 91%, respectively.

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**"BUSINESS MAKES THE DISCIPLINE  
APPEAR SMALLER AND MIGHT LEAD TO  
LICENSING BEING MARGINALIZED."**

Two years ago, those who preferred to use *industry* (36%) also outnumbered those who preferred *business* (18%). Note that in 2016, we asked respondents to choose between one or the other; 27% said they used both interchangeably. This year, we asked respondents to indicate their preference for each term separately.

A minority of respondents indicated that they used both *business* and *industry*, depending on the "context," but others also drop an identifier in favor of some variant of "I handle licensing for [insert property type/product category here]" instead.

As to why *industry* narrowly beats out *business*, one licensor seems to have hit the nail on the head: "*Business* makes the discipline appear smaller" and might lead to licensing being "marginalized." Another service provider who claimed that their preference was "irrational" noted that while *business* was a better fit, *industry* had a bigger sense of community.

Licensors were much more likely to prefer *industry* (58%) versus *business* (32%) and, in fact, had the lowest rate of preferring *business*. Agents narrowly beat out licensors, however, by share of those who dislike/avoid using *business*, 13% to 12%, respectively. Licensees were the most ambivalent, with the highest rates of respondents claiming that they were neutral.

By territory, licensing executives based in the U.S./Canada were the least favorable to *business* (14% dislike/avoid and 40% prefer/use) and Worldwide the least (0% dislike and 57% prefer). International executives were overwhelmingly neutral (61%). On the flip side, International executives were the most likely to prefer *industry* (69% prefer/use and 28% neutral) and Worldwide the least (33% prefer and 58% neutral).

Surprisingly, those who have been involved in licensing for a while were the least likely to embrace *industry*: 11% of those who have been in the business 20 years or more and 4% of the 10 to 20 year cohort actively dislike/avoid the term. (40% and 48% prefer/use *industry*, respectively.) The biggest support comes from those who have been involved 5 to 10 years (91% prefer/use and 9% are neutral).

But just because the older set doesn't like using *industry*, that doesn't mean they like *business* either. Just 55% of those who have been involved for over 20 years and 29% of those 10 to 20 years prefer/use *industry*. Surprisingly, 33% of those who have been involved under 5 years actively dislike *industry* (but given how few of them responded, this may simply be a rounding error).

### Speaking of Merchandise: Is it Mer-tch or Mur-kuh?

In a stunning win, 89% of respondents to the 2018 *LoL Survey* prefer to pronounce the word "mer-tch" and only 4% prefer "mur-kuh". Another 13% do not use the word "merch" at all, or very rarely. Note that these figures do not add up exactly to 100% because of both over- and under-counting. A minority of respondents abstained from selecting a pronunciation (7% of the total) and indicated that they do not use the term, while others indicated a preference but nevertheless also indicated that they do not use the term (or if they do, only rarely).

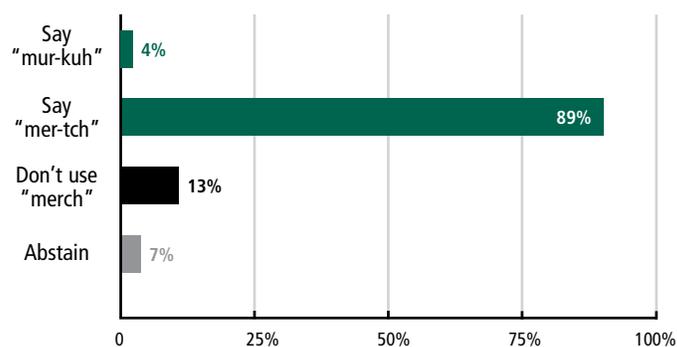
In response to one agent who asked, "Gah. This is a serious question?"—Yes, of course not. But it's our survey, our questions. And according to another agent, the phrase "merch is back, especially among young, hip companies." So, there! If nothing else, this question proves the incredible circularity of language use, because, as others have noted below, "merch" is terribly outdated.

Those who don't use "merch" had several reasons for doing so, the most common being that they say the whole word. One of the most charming comments from the *LoL Survey* is from a licensor who quipped "Why would I [say merch]? I also don't slick back my hair and think I'm god's gift to humanity." Other respondents were confused as to why anyone would need to shorten "merchandise" in the first place—are people really in "such a rush that they can't say merchandise?" asked one agent.

Another set of responses noted that the term "merchandise" itself is too broad to be used as a practical matter (it can "mean any product bought and sold" at retail) or, alternatively, too narrow (being too closely associated with events/souvenirs or musicians/bands). These respondents instead prefer using "licensed products" or "licensed consumer products".

Sadly, "how do you pronounce merch?" is an incredibly local, American question. A robust 95% of respondents doing business only in the U.S./Canada and 80% of those

#### USE OF "MERCH" AMONG LICENSING EXECUTIVES, 2018



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

SOURCE: The Licensing Letter

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### USE OF "MERCH" AMONG LICENSING EXECUTIVES, BY TERRITORY, 2018

TERRITORY	U.S./CANADA	INTERNATIONAL	WORLDWIDE
Say "mur-kuh"	5%	3%	0%
Say "mer-tch"	89%	43%	80%
Don't use "merch"	13%	0%	33%
Abstain	5%	55%	20%

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

SOURCE: THE LICENSING LETTER

### USE OF "MERCH" AMONG LICENSING EXECUTIVES, BY ROLE, 2018

YEARS OF EXPERIENCE	UNDER 5 YEARS	FIVE TO 10 YEARS	10 TO 20 YEARS	OVER 20 YEARS
Say "mur-kuh"	7%	7%	0%	8%
Say "mer-tch"	82%	87%	96%	85%
Don't use "merch"	14%	10%	19%	8%
Abstain	11%	7%	4%	8%

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

SOURCE: THE LICENSING LETTER

### USE OF "MERCH" AMONG LICENSING EXECUTIVES, BY YEARS OF EXPERIENCE, 2018

YEARS OF EXPERIENCE	UNDER 5 YEARS	FIVE TO 10 YEARS	10 TO 20 YEARS	OVER 20 YEARS
Say "mur-kuh"	0%	17%	0%	5%
Say "mer-tch"	88%	67%	97%	90%
Don't use "merch"	13%	17%	7%	18%
Abstain	13%	17%	3%	5%

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

SOURCE: THE LICENSING LETTER

doing business Worldwide had an opinion on the pronunciation one way or the other (the rest indicated that they simply do not use the term). But less than half (45%) of International respondents answered the question at all, with some noting that they've never heard of the term "merch" being used ("probably some U.S. invention," a licensor mused).

A reminder that for the purposes of the 2018 *LoL Survey* (see the full demographics below), U.S./Canada (50% of respondents), International (36%), and Worldwide (14%) are three distinct groups with no overlap in membership. Surprisingly, counting only those respondents who answered, there is no statistically significant difference in responses by territory. The only aberration is that Worldwide respondents are much more likely to not use "merch" at all (33% of that cohort).

Agents are the most likely to not use "merch" at all (19% of that cohort) and disdain "mer-kuh" (0% use the pronunciation). Licensors were the least likely to have an opinion on pronunciation (11% abstained). Other than these highlights, there is little variance in responses when accounting for role (e.g., licensor versus licensee) or working territory (e.g., U.S./Canada versus International) against the average.

But when it comes to years spent in the licensing business, we finally get somewhere. Disappointingly, our less-experienced colleagues were less likely to voice an opinion (15% of those with under 10 years' worth of experience abstained from ruling on a pronunciation versus 4% of those with over 10 years' worth), even after adjusting for territory.

The unpopular "mur-kuh" has allies in two camps: those who have been involved in licensing for 5-10 years (17% of that cohort) and over 20 years (5%). This can, very roughly, be extrapolated to assume that these respondents are Millennials and Boomers. It may be that Millennials inherited the word from their supervisors, or picked it up from their parents, but nothing in the numbers suggests a reason. Both cohorts are also the most likely to not use "merch" at all, with 17% of those with 5-10 years of experience and 18% of those with over 20 years answering so.

No one who has either been in licensing for less than 5 years or between 10-20 years preferred "mer-kuh". Surprisingly, those who have been in the business 10-20 years are the least likely to avoid saying "merch", with only 7% indicating that they don't use the shorthand. Almost all of them (97%) prefer "mer-tch".

Note that figures discussed here do not add up to 100% because some responses abstained from selecting a pronunciation (7% of the total) and indicated that they do not use the term, while others indicated a preference but nevertheless also indicated that they do not use the term (or if they do, only rarely).

### Demographics Behind the 2018 LoL Survey

Respondents to *TLL's 2018 LoL Survey* are roughly evenly divided between agents (30.1%), licensees (29.1%), and licensors (27.2%). Within the agents grouping, almost three-fourths (74.2%) represent brand owners, while 25.8% represent manufacturers. Just 8.7% of the total are consultants, 2.9% are retailers, and 1.9% are other (mostly for creative services). Half of all respondents (51%) affirmed that licensing is their company's entire business.

Compared to the first iteration of the *LoL Survey* in 2016, licensees have a much higher share of representation and consultants less. By the raw numbers, there is more representation for each major licensing role *TLL* tracks, except for consultants & service providers.

An even half (50.5%) of respondents are based in and do their primary business in the U.S./Canada. A significant minority (13.5%) do business Worldwide. International

respondents are mostly based in Europe (21.6% of total share), Asia (7.2%), Latin America and Australia/New Zealand (2.7% each), and the Middle East/Africa (1.8%). Note that for the purposes of the 2018 *LoL Survey*, U.S./Canada, International, and Worldwide are three distinct groups with no overlap in membership.

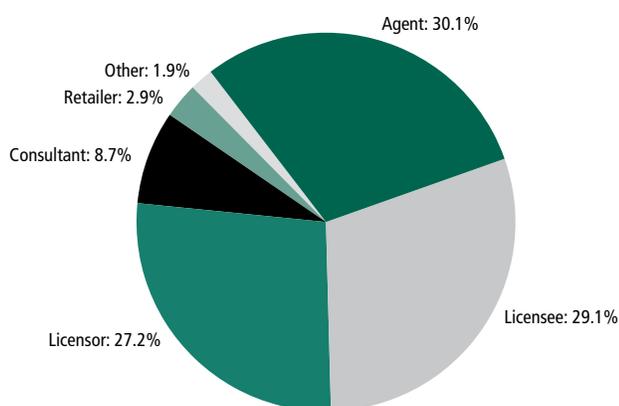
Just like last time, most of the licensing executives who responded to the 2018 *LoL Survey* have been in the industry for a while. Almost half (44.9%) of respondents have been involved in licensing for over 20 years. One-third (32.6%) have been in the business for 10 to 20 years, 13.5% for 5 to 10 years, and 9.0% for less than 5 years. There was no

significant difference in experience when sorting by territory or role. Unsurprisingly, agents were the most experienced cohort.

To try to sort out biases, we also asked which property types and product categories respondents were most familiar with. While each was well-represented, the most popular brand type was entertainment/character with 63% of respondents indicating that they are involved with the property type. This was followed by toys/games (34%), art and publishing (33% each), and celebrities/estates and fashion (30% each). No property type *TLL* tracks counted under 20% share.

On the consumer products/services side, the most popular category was gifts/novelties at 54%, followed by toys/games (47%), apparel (42%), accessories (40%), domestics/housewares and stationery/paper (39% each), publishing (37%), and food/beverages and furniture/home furnishings (34% each). The only product category that counted under 20% share was music/video at 9% share.

SHARE OF 2018 LoL SURVEY RESPONDENTS, BY ROLE



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

SHARE OF 2018 LoL SURVEY RESPONDENTS, BY TERRITORY AND ROLE

TERRITORY	LICENSOR	LICENSEE	AGENT	OTHER	TOTAL
U.S./Canada	46%	51%	53%	47%	50%
International	38%	41%	30%	47%	38%
Worldwide	16%	7%	17%	6%	12%
<b>Total</b>	<b>27%</b>	<b>29%</b>	<b>30%</b>	<b>14%</b>	<b>100%</b>

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

## CONSUMER RESEARCH

### 2018 Holiday Spending Expected to be Strong

U.S. **consumer confidence** rose to an 18-year high in October, per The Conference Board. The index reading of 137.9, driven largely by a robust labor market, indicates that consumers expect the current strong pace of economic growth to carry over into early 2019.

The NRF estimates that **holiday spending** will increase 4.1% this season compared to last year, for an average of \$1,007.24 spent by each consumer. The research firm cites high consumer confidence, lower unemployment, and higher take-home pay as factors driving high demand. Despite tariffs on Chinese goods taking effect in September, most retailers had imported goods earlier and tariff impacts are expected to be minimal.

The top three **spending categories** per the NRF: gifts (\$637.67 each); non-gift holiday items such as food, decorations, flowers, and greeting cards (\$215.04); and other non-gift purchases that take advantage of the deals and promotions throughout the season (\$154.53).

Meanwhile, Deloitte estimates that total **holiday spending** will reach an average of \$1,536 per household. Most of the budget (\$611) will be spent on holiday entertaining and socializing outside the home and the rest (\$525) on an average of 16 presents and gift cards, up 20% from 2017. Over half (51%) of shoppers planning to buy something for themselves.

Looking at **distribution channel**, per the NRF, an equal number of shoppers (55%) will shop online and in department stores, while 51% will go to discount stores, 44% to grocery stores, 33% to clothing stores, and 24% to electronics stores. Meanwhile, the NPD Group estimates that 60% of U.S. consumers plan to shop at both brick-and-mortar stores and online this holiday season, according to the NPD Group. In addition, more than 70% plan to shop online only; 42% at mass-merchant and discount locations; 24% at national chains; and 23% at department stores. And Deloitte shows that consumers plan to spend 57% of their budget online and just 36% in stores (down 10 percentage points from 2017).

*Continued on page 22*

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According to a U.S. Industrial & Logistics Figures report conducted by commercial real estate services firm CBRE, the overall industrial availability rate for **warehouses and distribution centers** dropped to 7.1% in Q3 2018—the 33rd consecutive quarterly decline and the lowest since 2000 (the longest span of time since CBRE began tracking data in 1988). The growth of ecommerce, consumer spending and an overall strong U.S. economy are credited for this unprecedented demand and resulting logistical nightmare. Initial data shows that about 63 million sq. ft. of industrial spaces were occupied in Q3, and in the past year, demand has exceeded supply by 35 million sq. ft.

At the same time, **imports** at major retail container ports are expected to reach near-record levels (in spite of the China tariffs), according to the NRF. The firm forecasts that the month of October will handle 1.87 million TEU (20-foot-equivalent units), up 4.3% from September, and the fifth month in a row to top last year's record-breaking peak of 1.83 million TEU.

With the warehouse shortage entering crises levels, it remains to be seen how retailers will address such a logistical nightmare as consumers increasingly expect instant gratification. Separately, the NRF reports that for holiday online shoppers, free shipping is most important, with 94% planning to use it, 16% saying they'll use expedited **shipping**, and 11% planning on same-day delivery. Entertainment/character (\$31.1 billion).

### OTOH: The Chinese Consumer

**Alibaba** smashed through another sales record for **Single's Day** with over \$30.8 billion in sales taking place over the 24-hour event. The shopping holiday generated \$25.3 billion in sales last year. Known as the 11:11 shopping festival because it takes place on Nov. 11, Single's Day festivities included a gala featuring the likes of Miranda Kerr

and Mariah Carey. Sales hit \$1 billion by the one minute and 25 second mark, as shoppers hit the “buy” button on waiting carts. In contrast, according to Adobe, online sales for Black Friday in the U.S. generated \$5 billion in 2017. For the first time, Singapore-based ecommerce site **Lazada** will help draw in Southeast Asia consumers and **Ele.me**, Alibaba's food delivery platform, will provide delivery services for select Starbucks stores across 11 Chinese cities.

**Chinese luxury consumers** are the fastest-growing consumer segment worldwide, but the traditional demographics—age, gender, location, and income—have proved inefficient for brands. In a new report, **Euromonitor Intl.** suggests five different personality types marketers can use to target this consumer class instead:

1. **Secure traditionalist** (27% of the Chinese market). One of the hardest demographics to address, this consumer avoids shopping for strongly branded products and prefers saving money over defining themselves through labels.
2. **Inspired adventurer**. Driven by experiential marketing, they like trying new services and traveling overseas to do so.
3. **Undaunted striver**. An image-conscious consumer that demands branded purchases, luxury, and the latest tech gadgets. Influencers are a particularly useful strategy to target this class, but personalization is key.
4. **Balanced optimist**. One who values healthy living and well being, but is nevertheless extremely plugged-in and uses tech to make their lives easier and enable their lifestyle choices.
5. **Cautious planner** (13% of the Chinese market). The only consumer that prefers to make purchases using traditional methods (i.e., not mobile payments). Exclusive, heritage brands will get a positive reception from this demographic.

## EDITORIAL

### A Deep Dive into the American Consumer Class

Most of the industry researchers, think tanks, and little birds we consult seem to have adopted a universally sunny view of consumer spending. But our analysis of the health of **U.S. consumer demand** is a little more strained—maybe even stretched to the point of unrealistic—and we should share why.

On the face of it, things certainly look good: Per the U.S. Census Bureau, middle-class income rose above \$61,000 in 2017, the highest-ever level recorded (even if it's not statistically significant from highs reached in 2007 and 1999). The national poverty rate also declined to 12.3%, the lowest level in over a decade. Average hourly earnings are now up 3.1% over last year. And the unemployment rate has reached a 50-year low of 3.7%.

But this extra income is mostly coming from families having another person in the home employed again or working

additional hours, explains the Census Bureau. (Note: The average U.S. household has 2.6 people.) Income inequality remains near the highest levels in the modern era, and the share of Americans without health insurance refused to go down from 8.8% in 2016. Wages have remained stagnant and any gains have been sluggish and mostly wiped out by rising prices for gas, rent, and other necessities.

Separately, the Bureau of Labor Statistics estimates that 41.7 million laborers (or a third of the American work force) earn less than \$12 an hour, and almost none of their employers offer health insurance. A recent study from Third Way reveals that just 38% of all jobs available nationally pay enough to afford a middle- or upper-class life for a dual income-earning family with children; 32% of jobs pay a “living wage”, or enough to get by but not take vacations, save for retirement, or live in a moderately priced home;

and 30% pay a so-called “hardship” wage, which is less than what a single adult needs to make ends meet.

A slight majority of Americans (52%) do live in middle-class households, according to the Pew Research Center. And another 20% or so live in upper-income households. But Pew explains that that’s because they’re juggling multiple jobs or relying on investments, an inheritance, or other household members who may have higher-paying jobs.

In short: The opportunity simply isn’t there to sustain meaningful economic growth over the next two, three, or even five years. Whatever consumer demand exists is either unstable, overvalued, or (more likely), if it’s being accurately measured, just a hint of vast, untapped

potential. Obviously, this is nothing new; in fact, today’s consumer class is the largest we’ve ever seen in human history—even as “emerging economies” like India and China have not finished lifting billions into our collective plane of economic activity.

What we have is enough to maintain flattish momentum until we hit a crisis point. After all, when consumers are working more for less, they do in fact “splurge” more on expensive, shorter-lived consumer goods/experiences instead of big-ticket items like a vacation, or a house. That is one of the real reasons licensed retail sales will not drop in the same time frame. But it’s hardly a reason to breathe easy.

## Who’s News

Are you hiring? Being promoted, changing jobs, retiring? Launching a new company? Issuing a tribute?

Email the editor at [karina@plainlanguagemedia.com](mailto:karina@plainlanguagemedia.com) and we’ll announce the news in our next issue of Who’s News.

Rovio appoints **Alexandre Pelletier-Normand** as EVP of its Entertainment’s Games Business Unit and a member of leadership team, beginning Jan. 2, 2019. He will be responsible for Rovio’s game studios and game development and reports directly to CEO **Kati Levoranta**.

**Debra Restler** is promoted to SVP Business Development & Marketing at Beanstalk.

**Elise Contarsy** is named SVP Bonnier Consumer Products, reporting to CEO **Eric Zinzenko**. She continues to serve on the Board of the Licensing Industry Merchandising Association (LIMA) and is a consultant to the Private Label Manufacturers Association.

Viacom simplifies its structure for Viacom Media Networks (BET Networks and Nickelodeon remain as is):

- ▶ **Comedy Central head Kent Alterman** adds Paramount Network and TV Land to his responsibilities;
- ▶ **Chris McCarthy** expands his current role of President of MTV, VH1 and Logo to now include CMT;
- ▶ **Kevin Kay**, formerly President of Paramount Network, TV Land, and CMT, will leave company after helping with the transition.

Separately, **Shauna Phelan** joins Nick as SVP Scripted Live Action and former Lego exec **Lars Silberbauer** is now Viacom’s new SVP MTV Digital Studios.

Centric Brands (form. Differential Brands Group) appoints **Anurup Pruthi** as its new CFO and adds **Glenn Krevlin** to its board of directors. Pruthi reports to CEO **Jason Rabin** and will help grow the lifestyle brands collective’s core expertise in women’s, men’s, and kids’ apparel and accessories.

Pentland Brands Ltd. appoints **Katrina Nurse** as its new CFO.

VF Corp. appoints **Jan Van Leeuwen** as VP & GM The North Face EMEA. He will also serve on the global leadership team for The North Face brand.

Snap adds **Jeremi Gorman** as Chief Business Officer and **Jared Grusd** as Chief Strategy Officer. Additionally, **Jean Gonié** is now Director EU Policy and **Alston Cheek** is Director Platform Partnerships.

Activision Blizzard adds veteran NFL executive **Johanna Faries** to the company’s Esports Leagues leadership team, where she will serve as Head Product for the Call of Duty World League.

**Armando Nuñez** is named President & CEO for the CBS Global Distribution group as well as Chief Content Licensing Officer for CBS Corporation. Nuñez will continue as head of CBS Studios Intl. and will re-assume leadership of CBS Television Distribution.

**Scott Koondel**, previously CBS Chief Content Licensing Officer, is launching an independent production and distribution venture that would be housed at CBS. Earlier this month, President of CBS Television Distribution **Paul Franklin** announced his retirement.

Valiant Entertainment promotes **Julia Walchuk** to Sales & Live Events Manager and hires Oliver Taylor as Intl. Licensing Coordinator.

New Balance Athletics President & CEO **Rob DeMartini** will step down effective Dec. 31; Joe Preston will assume his role.

**Michelle Mosier** joins Hamilton Beach Brands and will assume the roles of VP, CFO & Treasurer effective Jan. 1, 2019. She replaces **James Taylor**, who is retiring after 35 years.

ZAG names **Ian Lambur** as its SVP Global Distribution & Co-productions.

**Michael Lunsford** joins Funko’s Board of Directors.

**Ralph Rivera** is appointed Managing Director NBA Europe & Middle East where he will oversee the NBA’s basketball and business development in the region.

Retired Walmart exec **Michael Fung** succeeds **Jerry Murray** as Interim CFO of JCPenney. Murray resumes his role as SVP Finance.

Sports agency Independent Sports & Entertainment launches a new property sales group and hires **Jake Stone** as VP Property Sales to lead the new venture. It will initially focus on securing global partnerships and sponsorships as well as naming rights for sports leagues, teams, venues and events.

Timberland appoints **Christopher Raeburn** to serve as Global Creative Director for the brand.

PlayFusion is growing its North American team: **Jason Brenner** is promoted to VP Sales & Marketing North America, **Richard Dracass** will be North American Retail Manager, **Steve DeVries** is joining the company as North American Marketing Manager, and **Tayson Turner** has been hired as North American Organized Play Coordinator. The company is behind multi-media trading card games Warhammer Age of Sigmar: Champions and Lightseekers.

Overstock.com adds to its retail leadership team: **Catherine Borda** is appointed to the newly created position of Chief Customer Officer, **Chris Donnelly** is Chief of Staff to the President, and former Co-President **Dave Nielsen** returns in the role of Chief Sourcing & Operations Officer.

**James “JC” Curleigh** is appointed CEO of guitar company Gibson Brands.

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## Who's News, Cont'd.

ESPN executive **Russell Wolff** takes the reins as EVP/GM of ESPN+, where he'll oversee Disney's direct-to-consumer sports streaming service and collaborate on managing and commercializing ESPN-branded digital products.

**Heather Moosnick**, YouTube TV's Head Global Business Development, Strategy & Content Partner Management, accepts a position as SVP Content Partnerships at Hulu.

Abrams Artists Agency hires two agents to build out its alternative programming, digital media, licensing, and branding division. **Maxwell Mitcheson** is based in Los Angeles and **Henry Gordon** in New York; both report to the division's SVP, **Alec Shankman**.

Formerly at Everlast, **Adam Geisler** is now CEO of Super Soccer Stars.

**Laura Ferguson**, formerly at Time Inc., joins Open Road Integrated Media as SVP Business Development.

Cherokee Global Brands appoints **Evan Hengel** to its board of directors.

The English Premier League hires **Susanna Dinage** from Discovery Communications as the soccer league's first new CEO in two decades.

Macy's Chief Merchandising Officer **Jeffrey Kantor** plans to retire after 36 years with Macy's and its predecessor companies. He will step down next year effective Apr. 16. The position has not been filled.

Intl. Market Centers has a new executive leadership team following its recently concluded merger with AmericasMart. The integrated leadership team includes **Greg Avitabile**, EVP Operations; **Dorothy Belshaw**, EVP, CMO & Chief Digital Officer; **Scott Eckman**, EVP & President Furniture/Home Décor Leasing; **Bill Lacey**, EVP & CFO; **JoAnn Miller Marshall**, EVP & President Tradeshow Leasing; **Carrie Messina**, SVP & Human Resources; and **Dave Savula**, EVP & President Gift/Apparel Leasing.

**Des Esposito** joins Paramount Pictures as EVP Creative Advertising.

The Crown League names **Jeff Kaiser** as Chief Content Officer, **Tim Ettus** as CMO, and **Casey Jacobs** as VP Business Development.

**David Loechner** resigns as President & CEO and as a member of the board of Emerald Expositions Events. CFO **Philip Evans** is appointed as an Interim President & CEO as the board commences an executive search. Loechner will stay on through the end of the year to ensure a smooth transition.

The head of Victoria's Secret, **Jan Singer**, leaves L Brands after two years in the role. In August, the company announced the retirement of **Denise Landman**, CEO of its Pink brand. Her replacement is **Amy Hauk**, formerly of Bath & Body Works.

Corus Entertainment EVP & COO **Barb Williams** is retiring from the Canadian broadcaster.

**Wanda Ferragamo**, who built her husband's small Italian shoe business—Salvatore Ferragamo—into a global luxury brand, has died at age 96.

Pixar Co-founder and the President of Walt Disney and Pixar Animation Studios **Ed Catmull** plans to retire next year. He will step down from his position at the end of the year and continue on in an advisory capacity through July 2019. Pixar President **Jim Moss** and Walt Disney Animation Studios president **Andrew Millstein** will oversee the operation of their respective studios, reporting in to Walt Disney Studios president **Alan Bergman**. Both studios will continue to be led creatively by Chief Creative Officers **Pete Docter** and **Jennifer Lee**, who moved into their respective roles after longtime Pixar chief **John Lasseter** stepped down in June due to misconduct allegations. Lasseter took a six-month sabbatical last November, citing unspecified "missteps". He then segued into a consulting role at the company that will end on Dec. 31, 2018.

**Mark Frissora** will step down as CEO of Caesars Entertainment next year.

The NHL's fourth president, **John A. Ziegler Jr.**, passed away at the age of 84.

Marvel legend **Stan Lee** died at the age of 95.



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