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DECEMBER 2017/JANUARY 2018 VOLUME 20 NUMBER 6

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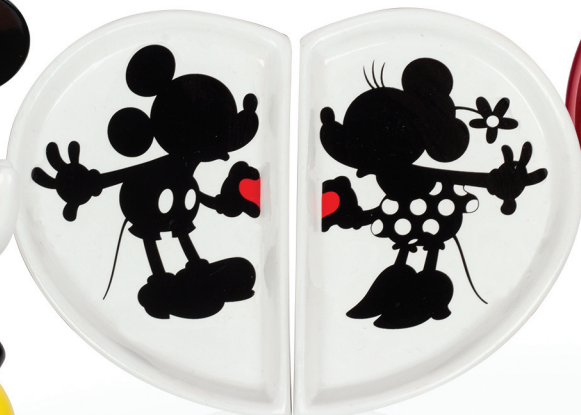
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- The Influentials – Women in Licensing
- Tuning In To Anime
- Looking Back At 2017

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Known for its vibrant art and whimsical characters, tokidoki is a young brand that is hard at work establishing deep roots in the world of products and merchandising. With the world as its canvas, expect to see the globe become tokidoki-fied.



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The Influentials

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E-COMM WINS HOLIDAY SHOPPERS

Not surprisingly, digital commerce is up in Q4, with sales in November and December expected to yet again trend toward mobile and e-shopping. And, as ever, licensed products are in shoppers carts.

The Super Bowl of shopping is here, and the sales outlook is largely positive. It's no secret that retail is changing, and that it is impacting the way licensors navigate the consumer product landscape.

Analytics firms across the board are reporting mobile and online shopping rises this year yet again (to no one's surprise), but not during the times it has in the past.

According to Adobe Analytics, U.S. consumers spent a record \$7.9 billion in online sales on Black Friday and on the Thanksgiving holiday, up 17.9 percent from a year ago. (Source: Reuters.) The National Retail Federation reports that, over the course of the five-day weekend, more than 174 million Americans went shopping and spent an average of \$335.47, with older Millennials (25- to 34-year-olds) spending the most (\$419.52).

Toy sales began in earnest back in September, says research firm The NPD Group, with many retailers, both online and in-store, aggressively promoting savings and deals for early birds. But, despite Thanksgiving weekend steals and early incentives, NPD predicts sales will continue through the season for a bulk of shoppers.

"Despite the early start, consumers will naturally wait until the week before Christmas to shop as they anticipate better bargains," says Juli Lennett, senior vice president, industry analyst, toys, The NPD Group. "This is especially true this year because there will be a Saturday and Sunday before Christmas to shop."

Research and data firm eMarketer is predicting that total retail sales will increase 3.1 percent over the course of the shopping season to a projected \$929.15 billion. E-commerce sales will jump 11.5 percent this holiday season to its largest share ever—a projected \$106.97 billion, while non-e-commerce retail will bring in an estimated \$822.18 billion (88.5 percent) of merchandise sales during November and December. It is no surprise, then, that Amazon is expected to have the lion's share of purchases this year, with an expected \$196.8 billion in retail sales, representing 3.9 percent of all retail sales in the U.S., says eMarketer.

So what will shoppers be buying? Beauty products.

"Makeup has taken on a greater role in holiday over the last few years as consumers find excitement in a category ripe with fun and whimsical items perfect for gifting," says Larissa Jensen, beauty industry analyst, The NPD Group.

Through September, sales of mini/travel-size luxury makeup increased 58 percent, and has tripled in growth

over the last three years. (Source: The NPD Group) And licensed ranges and collaborations factor heavily throughout each of the holiday must-have lists for beauty.

Beauty retailer Sephora has highlighted more than 220 products and gift sets that it predicts will end up in shopping carts spanning from special edition Hello Kitty-branded tweezer sets from Tangle Teezer and Fenty Beauty by Rihanna lip gloss to Dyson x Ouai blow drier sets and Swarovski crystal-topped water bottles from BKR.

In toys, retailers have all rolled out their annual holiday must-haves as well, as the season proves to be always fruitful for licensors, in particular.

Nostalgic toy products and evergreen properties are always in style, and retailer Target says that for preschoolers, Playskool's Tickle Me Elmo is back in a big way, as is "Peppa Pig," with the brand's family home play set a win for gifters. Character-inspired toys such as the *Marvel Spider-Man Homecoming* action figure and the *Star Wars Force Link BB8 2-in-1* are also topping best-of-lists. Other top toys include Hasbro's furReal toy range (in fact, the Roarin' Tyler tiger tops multiple retailer lists) and Spin Master's Hatchimals, the must-have item for 2016, again finding its way onto wish lists, now with accessories and play sets. MGA Entertainment is continuing to find success with its L.O.L. Surprise! collectibles, according to most major retailers; while Amazon says that Fisher-Price's Think & Learn Smart Cycle is a smart buy, along with the *LEGO Ninjago Movie* Green Ninja Mech Dragon and the R2-D2 app-enabled Droid by Sphero. Entertainment One's "PJ Masks" property is also a hot holiday buy, with the Rival Racers track play set finding its way onto several toy lists. Also returning to must-have status is Teddy Ruxpin from Wicked Cool Toys, the 1980's classic that has been updated to now include an app, LCD enhancements and more. A cult favorite this year, if you can say that about toys, are Fingerlings from Wowwee. The \$14.99 collectibles are selling out everywhere.

And almost all of these toys are global, with U.K. retailers such as Argos, The Entertainer and Tesco each naming similar ranges on their holiday lists.

Many of these toys and much more can be found at any one of the global toy fairs taking place this winter, including the Hong Kong Toys & Games Fair (Jan. 8-11 in Hong Kong, China), the The Toy Fair (Jan. 23-25 in London, England) and Spielwarenmesse (Jan. 31-Feb. 4 in Nuremberg, Germany). ©



by AMANDA CIOLETTI
executive editor

BUILDING YOUR PERSONAL BRAND

Brandgenuity's Adina Avery-Grossman offers advice to those coming up in the licensing industry, and in the process illustrates what ultimately makes a branding agency successful.



by **ADINA AVERY-GROSSMAN**
partner, Brandgenuity

Adina Avery-Grossman is a founding partner of Brandgenuity, an award-winning, global brand licensing agency. Her areas of expertise include brand strategy, licensing planning and the development of products, packaging and marketing materials. She was classically trained in brand management at Kraft and has since worked with renowned corporate and entertainment brands, including BMW, Anheuser Busch-InBev, Food Network, Arm & Hammer, Duck Dynasty, Playtex, Verizon and many others. Avery-Grossman is an alumna of Princeton University and Columbia Business School.

I'm honored to be authoring this column in the first Influentials issue. I've always felt welcome as a woman in licensing, and it keeps getting better—the industry is more professional, the extensions more strategic and the people are brighter and more creative. If I were to meet someone in the beginning stages of a licensing career, here is the advice I would offer:

Be Proud—Licensing is Important Work

We are caretakers of precious brands. When we extend brands, we also have an obligation to protect them, to know their boundaries and to be strategic about where we take them. Take the time to truly understand the brand and why consumers feel connected to it. Then build these insights into great products that help to tell the brand story.

Cross Train—The More You Understand, the Better You will Be

Licensing is a multi-disciplinary effort that requires people with diverse skill sets such as strategic thinking, sales, legal, product development, marketing, financial accounting and analysis. Consider your career not as a ladder, but as a jungle gym (thanks, Sheryl Sandberg). Make sure you accrue all kinds of experiences, and hone a variety of skill sets. The more you sit in the “other” chairs at the table, the better you will be at what you do. If you have been doing approvals, take a shot at sales. If you have worked as a licensee, cross over and take a job working for a brand. Or, consider working at an agency where you get to experience multiple brands and can gain exposure to multiple categories.

Be Open to Ideas—Wherever they Come From

Millennials, listen up! This industry feeds on ideas. No matter your age or seniority, you can make your mark. At Brandgenuity, we tell our Millennial team members to have the courage of their convictions, but also remember to learn from those with experience. You have your ears to the ground—brainstorm all the time and keep your minds open. Be positive. “This cannot be done,” or “We’ve tried this before,” shouldn’t exist in an industry where the only constant is change.

Think Big, Take Risks—Or Someone Else Will

Thinking big today means thinking globally. In the last five years, Brandgenuity has pivoted from servicing North America to becoming a global licensing provider. It has required new people, ideas and processes.

Thinking big means thinking differently about how you bring ideas to market. Ten years ago, co-branding was a small part of the industry. Today, some of the greatest brands are

collaborating, like Louis Vuitton and Supreme in the fashion world, and Hefty and Arm & Hammer in the corporate brand space. It means giving today’s consumer what he/she wants, which are experiences and not just products.

Thinking big means taking risks and finding brands in new spaces. Brandgenuity has three entertainment clients that are in the OTT space that came up via Netflix and YouTube, and we are bullish about their future.

Thinking big can also mean thinking small. Some of our best client experiences have focused on a few extensions that are very meaningful and have become annuities, such as Pella Garage Doors, or focus on a narrow consumer segment, like a “South Park” 20th anniversary subscription box from Loot Crate.

Sweat the Details—They are the Building Blocks of Success

While big ideas drive growth, this business is built on a thousand small details. Build disciplined processes and make sure to follow them. Be careful and meticulous, and be willing to roll up your sleeves and do anything. Whether we are proofing dozens of cookware packages for Food Network or counting Pink Panther’s whiskers, we tell our team that the work we all do is important to the final output. Do it with a smile, and know that everyone is playing a part to protect these great brands.

Be Resilient—There Will Be Highs and Lows

When everything aligns, amazing and exciting things happen. Seeing your fingerprints on product, services, packaging and marketing is extremely gratifying.

However, the painful truth is that not all licensed products succeed. Many pieces of the puzzle must align: the right idea, partner, agreement, products and processes. Some products will launch while others never see the light of day. A positive attitude, a thick skin and a resilient nature are all requirements in this industry.

As you navigate the ups and downs, stop and find a mentor who can guide you, reassure you and inspire you.

Be Transparent, Kind, Humble and Grateful—In the End, That is What Matters

Trust is earned, not given. Mistakes happen. We tell our team to elevate mistakes or challenges immediately and we share them with clients in real time. Be humble because what is rocketing to success today could be over tomorrow. Act with integrity. Be grateful. Say thank you. Recognize and voice the good work of your peers and reports. Appreciate accomplishments and acknowledge where others have supported you. This is an industry based on relationships, so make sure you put people first. ©

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February Issue is Distributed at:

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- Toy Association International Toy Fair
- NYC Summit: The Business of Brand Licensing
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GLOBAL TOY OUTLOOK

NPD's global toy industry analyst, Frédérique Tutt, offers insight into the top properties country-by-country, and it's not always what you think.



Compiled by

Even though *Star Wars* ranks as the No. 1 global toy property overall for the 12 countries tracked by The NPD Group year-to-date, the Force doesn't top the list in any individual countries. (Source: The NPD Group, Inc./ Retail Tracking Service, January-September 2017)

In the U.S. and Canada toy markets, Pokémon became the top ranking property after a wider audience discovered the Japanese brand last year, thanks to the very successful "Pokémon Go" app.

Illustrating the popularity of superheroes in Mexico, DC Comics tops the list with Marvel just behind in third position.

In Europe, Playmobil has been the No. 1 property for a long time and still is in its home country, Germany, as well as in France, Spain, Belgium and the Netherlands. LEGO is also a strong contender in Europe, as well, with the LEGO City range in particular proving very popular in Russia, even though the vehicles category holds a disproportionately large share of the toy markets there compared to other countries.

Among the considered countries, none of the top five new properties for September–L.O.L. Surprise!, Fingerlings, LEGO Batman, Enchantimals and Roblox—have made it to the year-to-date ranking just yet, but

AMONG THE GLOBAL COUNTRIES, NONE OF THE TOP FIVE NEW PROPERTIES FOR SEPTEMBER—L.O.L. SURPRISE!, FINGERLINGS, LEGO BATMAN, ENCHANTIMALS AND ROBLOX—HAVE MADE IT TO THE YEAR-TO-DATE RANKING JUST YET.

they might as the largest quarter, accounting for 50 percent of annual toys sales, is still underway.

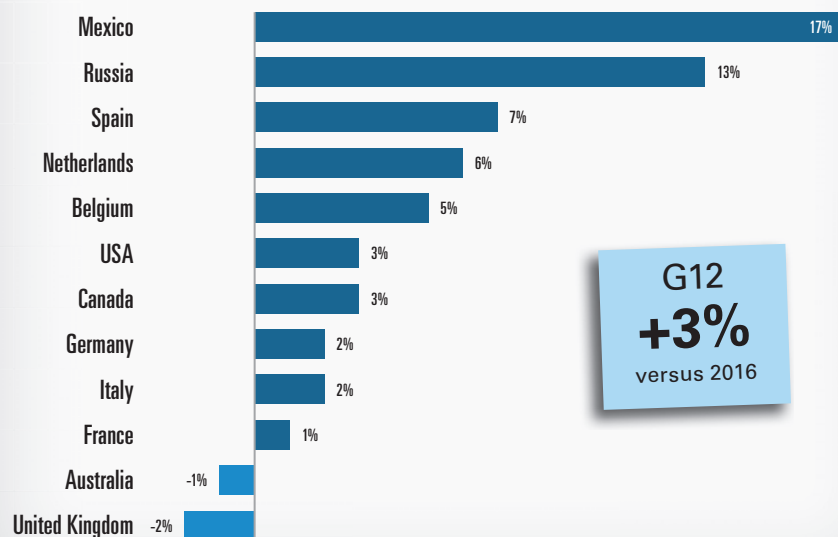
The 12 (G12) countries analyzed include Australia, Belgium, Canada, France, Germany, Italy, Mexico, Russia, Spain, the Netherlands, the U.S. and the U.K. ©

Top 5 Best-Selling Toy Properties

Rank	G12	U.S.	Germany	U.K.
1	<i>Star Wars</i>	Pokemon	Playmobil	LEGO Technic
2	Nerf	Nerf	<i>Star Wars</i>	<i>Star Wars</i>
3	DC Comics	DC Comics	LEGO City	"Paw Patrol"
4	Pokemon	<i>Star Wars</i>	LEGO <i>Star Wars</i>	Little Tikes
5	Barbie	Barbie	LEGO Technic	Marvel

Global Toy Sales Performance by Country

Value Change Year-over-Year



Source: The NPD Group | Retail Tracking Service | January-September 2017



Source: The NPD Group | Retail Tracking Service January-September 2017

NYC Summit Names First Speakers

An impressive roster of brand licensing and retail thought leaders will take the stage at the third annual NYC Summit: The Business of Brand Licensing networking event and conference in 2018.

Taking place Feb. 20 at the Convene event venue in Times Square, some of the executives slated to speak include:

- Rosa Zeegers, executive vice president, consumer products and experiences, National Geographic, will discuss how the company keeps this iconic 130-year-old brand relevant for today's consumers through innovative experiences and retail activations.
- A special session focusing on social influencers, featuring actor, author, entrepreneur and one of the biggest digital stars today, Jake Paul. Paul will be joined by manager and business partner Kevin Gould of Kombo Ventures and licensing agent Ross Misher of Brand Central to offer insight into how to harness the power of today's digital celebrities. Also participating in this session will be Gil Eyal, founder of HYPR! Brands, the world's largest influencer search and discovery directory and the market leader for in-depth influencer audience analytics.
- Alix Kram, vice president, global consumer products, Warner Music Group, who manages a portfolio that includes some of the biggest names in music from the Grateful Dead to Wiz Khalifa, will discuss the unique position that music brands have at retail.
- Josh Goodstadt, executive vice president, licensing, the National Basketball Players, Inc.,

the newly created subsidiary of the National Basketball Players' Association that manages group licensing and other business opportunities

for NBA players, will take part in a panel discussing the current state of the sports licensing business and the intricacies of managing athlete brands.

- Charlotte Clisby, co-founder and chief commercial officer, Evode Group, whose subsidiary Merchmaker offers a print-on-demand solution that works within the constraints of traditional wholesale, allowing brands such as Nickelodeon, WWE and CBS to get product in the hands of fans fast. Many more speakers will be announced in the coming weeks, offering insight into the burning topics that are shaping the brand licensing business today, including:
 - Responding to trends at the speed of social media
 - From eSports to VR: The evolving gaming ecosystem
 - Cutting-edge commerce models that are shaping the way the world shops
 - How boutique toy brands are taking over the sandbox
 - The remaking of traditional retail
 - And much more

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Space is limited at this exclusive, c-level event, and tickets are going fast, so secure your space today to take advantage of special Early Bird rates before they are gone.

"Every year at the NYC Summit we gather the top minds in brand licensing and retail to discuss the topics that are on everyone's mind—this year, that is clearly the rapidly shifting worlds of media and retail," says Steven Ekstract, group publisher, *License Global* magazine, developer of the NYC Summit. "At the 2018 Summit, we'll be hosting executives at the forefront of these changes who are helping to shape the new media and retail landscape, whether it be through SVOD, e-commerce innovations, eSports or tapping into the power of social media. As it has been for the past two years, this is a must-attend event for any executive looking to keep their business ahead of the curve."

The NYC Summit is developed by *License Global* magazine, part of the Global Licensing Group at UBM, and presented in partnership with LIMA. Sponsors already signed on to this year's event include BrandComply.com, JPatton, OpSec and Trevco.

Studio 100 Acquires Little Airplane Productions

In a move to further expand its international presence, Studio 100 has acquired the New York-based animation studio Little Airplane Productions.

Through the acquisition, Little Airplane Productions will continue to focus on developing and producing new projects in collaboration with Studio 100's animation studios—Studio 100 Animation in Paris, France, and Flying Bark Productions in Sydney, Australia. Studio 100 Media in Munich will handle international content sales, licensing and merchandising, and the global distribution of new brands and productions.

Little Airplane Productions is known for its work on series like "Wonder Pets," "Small



Potatoes," "Super Wings" and "P. King Duckling," as well as the development of content with Chinese partners that is sold outside of China.

"We have been working successfully with Josh [Selig] and his team for many years and currently develop 'Fun Town Wheels' and 'Rock, Tacco, Balloon' with him. So, we are very excited about having this opportunity to join forces on a broader level," says Hans Ulrich Stoeff, chief executive officer, Studio 100 Media and m4e. "After m4e and I linked up with Studio 100 at the beginning of this year, the next logical step in the international expansion was to go into partnership with Little Airplane Productions. We have been impressed by the accomplishments of Little Airplane Productions and their great expertise in children's and family entertainment. We are very much looking forward to producing world-class creations together."

Meredith to Buy Time Inc. for \$2.8B

Meredith has entered into a definitive agreement to acquire all outstanding shares of Time Inc. in an all-cash transaction valued at \$2.8 billion.

The merger, which has been unanimously approved by the board of directors of both Meredith and Time Inc., is expected to close during Q1 2018. Meredith expects the transaction to be accretive to free cash flow in the first full year of operations and anticipates generating cost synergies of \$400 to \$500 million in the first full two years of operation.

The acquisition will see Meredith's readership increase to 135 million and paid circulation increase to nearly 60 million. It will also see Meredith "transformed into a Top 10 digital media company" with 170 million unique monthly visitors in the U.S., over 10 billion annual video views and nearly \$700 million in digital advertising revenues.

Meredith also expects to increase its consumer revenue from diversified streams including bundled circulation activities, brand licensing, e-commerce, events, video creation, content management and marketing services.

"We are creating a premier media company serving nearly 200 million American consumers across industry-leading digital, television, print, video, mobile and social platforms positioned for growth," says Stephen Lacy, chairman and chief executive officer, Meredith. "We are adding the rich content-creation capabilities of some of the media industry's strongest national brands to a powerful local television business that is generating record earnings, offering advertisers and marketers unparalleled reach to American adults. We are also creating a powerful digital media business with 170 million monthly unique visitors in the U.S. and over 10 billion annual video views, enhancing Meredith's leadership position in reaching Millennials."

In terms of licensing, Meredith is the world's second largest licensor, reporting \$22.8 billion in retail sales of licensed products in 2016, according to *License Global's* annual Top 150 Global Licensors report. The company is known for its media brands such as *Better Homes & Gardens*, *EatingWell*, *Shape* and *Allrecipes*. Time Inc. does not appear on the Top 150 Global Licensors report; however, the company has developed robust licensing programs for its publications such as *Food & Wine*, *Sports Illustrated*, *Sports Illustrated Swim* and *Marie Claire*, among others, which will likely benefit significantly from the merger.

"This is a transformative transaction for Meredith, and follows a fiscal 2017 in which we posted the highest revenues, profit and earnings per share in our 115-year history," says Tom Hart, president and chief operating officer, Meredith. "When you combine our strong local television business—which has grown operating profits 15 percent annually over the last five years—with the trusted, premium multi-platform content creation of Meredith and Time Inc., it creates a powerful media company serving consumers and advertisers alike. We look forward to completing the transaction; welcoming the Time Inc. employees to Meredith; delivering on our pledge to achieve identified synergies; and growing shareholder value."



Alibaba Invests Heavily in Brick-and-Mortar

Alibaba has invested approximately \$2.88 billion in Sun Art Retail Group, a top grocery chain in China.

Through the investment, Alibaba will obtain an aggregate direct and indirect stake of 36.16 percent in the food retailer by acquiring shares from Ruentex. The supermarket and hypermarket chain Auchan will also increase its stake in Sun Art.

Sun Art is a multi-format offline food retailer in China that operates 446 hypermarkets as large as 17,000-square-meters in 29 provinces, autonomous regions and municipalities across China under the RT-Mart and Auchan banners. It also operates superstores and unmanned stores under the Auchan Minute brand.

Through the combined resources of Alibaba, Auchan and Ruentex, Alibaba will introduce a variety of new retail solutions in Sun Art stores, including online and offline integration together with modern fulfillment and personalized customer experiences.

The alliance also reflects Alibaba's "New Retail" vision, which sees the company leverage its internet-based approach and new technology while working with retail partners to provide a seamless online and offline experience to Chinese consumers. It also follows several other brick-and-mortar investments and acquisitions Alibaba has made in recent years, including its \$4.6 billion investment in Suning Commerce Group in 2015, opening its first bookstore in 2016, its purchase of the China business of Yum Brands for \$460 million in 2016, its \$290 million investment in Sanjiang in 2016, its partnership agreement with Bailian Group in February and its roughly \$100 million investment in Lianhua in May.

The deal also aligns with Auchan Retail's Vision 2025.

"Alibaba is excited to join with our new partners to redefine traditional retail through digital transformation," says Daniel Zhang, chief executive officer, Alibaba Group. "Physical stores serve an indispensable role during the consumer journey and should be enhanced through data-driven technology and personalized services in the digital economy. By fully integrating online and physical channels together with our partners, we look forward to delivering an original and delightful shopping experience to Chinese consumers."

"In recent years, consumer demands have changed tremendously with the rapid growth of the mobile Internet, and Sun Art is also endeavoring to move from offline to online," says Peter Huang, vice chairman, Ruentex Group. "Ruentex is delighted to see the win-win collaboration between Sun Art and Alibaba with high synergies in online and offline that will meet the needs of consumers for a better life with better products and services and higher efficiency."

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Top 10 U.S. Brands Finds Google, Marlboro Sharing Accolades

Google has claimed the title of “most valuable U.S. brand” in the first-ever 2018 BrandZ Top 100 Most Valuable U.S. Brands report, compiled by WPP and Millward Brown.

This is the first year BrandZ has valued the top 100 U.S. brands. However, many of these brands have been valued as part of the global BrandZ report, which gives insight into how some of these companies have fared over time.

Google’s current brand value checks in at \$286 billion, while Apple is close behind at \$279 billion. According to the report, the Google/Apple share is likely due to the vast amount of time their customers spend with the companies products and services.

The other companies rounding out the top 10 include (in order) Amazon, Microsoft, Facebook, Visa, AT&T, McDonald’s, IBM and Marlboro.

The total brand value of the BrandZ Top 100 Most Valuable U.S. Brands 2018 is \$3.2 trillion. The top 10 alone account for \$1.6 trillion, or half of the total value.

Although Google is the most valuable brand in the U.S., Amazon has achieved the fastest growing brand value since 2006. It also ranks as the second-highest among American brands for brand experience (FedEx is first), illustrating just how important a customer’s interaction with a brand is in building relationships.

“We are excited to be bringing the BrandZ study to the U.S. America today is home to some of the world’s strongest and most universally recognized brands. These include old favorites, like Disney and Coca-Cola, and rapidly emerging powerhouses, like Amazon and Facebook,” says David Roth, chief executive officer, The Store WPP, EMEA and Asia, and chairman, BAV Group. “The U.S. economy has been forecast to grow 2.1 percent in 2018. While this is decidedly sluggish, America remains a vibrant hotbed of innovation and creativity. We see this in the top five most valuable brands—Google, Apple, Amazon, Microsoft and Facebook—a group with such global reach and influence that we’ve dubbed them the Fearsome Five.”

Highlights and key findings from the BrandZ Top 100 U.S. Brands study include:

- Fifty-four brands from the U.S. were also included in the BrandZ Top 100 Most Valuable Global brands ranking.
- Surprisingly, technology brands have not dominated the charts for fastest growth; instead, half of the top 10 fastest risers are fast food brands including Domino’s, Burger King, Starbucks, McDonald’s and Taco Bell. Many of these brands are growing due to their adoption of technology to drive convenience.
- Strong brands continue to get stronger. The study found that brand contribution, or the amount of value directly attributable to the brand itself, is a key predictor in brand growth. For example, brands that rank highly on brand contribution grew 307 percent on average, while brands that rank in the bottom on this measure have lost 10 percent in value in the past 12 years.
- Brands that have asset-light strategies typically have both higher growth in brand value and higher brand contribution scores. Asset-free models also allow brands to explore product development and other types of diversification. For example, Disney has expanded into theme parks, cruise ships and products throughout the years, while Microsoft has diversified into devices and passed its learnings on to third-party manufacturers.
- AI promises to be a transformative force for brands, allowing them to get a 360-degree view of their customers and insight into their minds. According to the study, brands that want to excel in measures like brand experience will increasingly need AI and machine learning to draw a more precise picture of their consumers.

Hong Kong: License to Thrill

The 16th edition of the HKTDC Hong Kong International Licensing Show will take place Jan. 8-10 at the Hong Kong Convention and Exhibition Centre. This year’s event will feature top global licensors and agents exhibiting in Hong Kong for the first time.

The importance of Hong Kong as a hub for the global licensing business can be seen through its centralized location and ease of doing business with the Chinese mainland, as well as its strength as the top destination in all of Asia to establish copyright protection for brands.

This year, Global Brands Group, the world’s largest licensing agency, is bringing its top brands to China including Coca-Cola, Hershey’s, FLOWER Love the Way you look (Drew Barrymore’s brand), Crocs, Peanuts, Peter Rabbit/Beatrix Potter, Paddington Bear and Twentieth Century Fox, to name a few.

IMG, the world’s second largest licensing agency with \$8 billion-plus in retail sales, according to License Global’s annual Top 20 Global Licensing Agents report, is exhibiting with such global brands as Yamaha, *Playboy*, National Geographic, Ducati, *Cosmopolitan*, Volkswagen and Arnold Palmer.

LMCA, a top 10 global licensing agency will bring to Hong Kong such hot brands as “Plants vs Zombies,” “Need for Speed,” “Oddbods,” Mr. Bean, Duckin Pop, Sugar & Babe and Misteez.

In addition to these top global agents, visitors to Hong Kong Licensing Show can expect to see global kids’ entertainment licensor Nickelodeon feature its major TV franchises such as “Paw Patrol,” “SpongeBob SquarePants,” “Dora the Explorer,” “Shimmer and Shine,” “Blaze and the Monster Machines” and “Teenage Mutant Ninja Turtles.”

Another major licensor that will be represented at HKTDC is Warner Bros., the mega studio behind *Wonder Woman*, *Justice League*, *Superman vs. Batman*, DC Comics’ “DC Super Hero Girls,” “Looney Tunes,” *Harry Potter*, “Scooby-Doo,” “Tom and Jerry” and many other renowned properties.

The size and scope of the licensing market in Asia continues to grow. According to the International Licensing Industry Merchandisers’ Association’s annual Global Licensing Survey, the Asia-Pacific region accounts for 12.7 percent of the worldwide licensing market. Given the huge population in this region and the rapid development of consumer economic and e-commerce infrastructures, LIMA estimates that the Asian licensing share will continue to grow over time.

In Mainland China, 41 percent of sales now come from online purchases—the highest for any country in the world. A clear shift occurred in Alibaba’s China strategy in 2016 from a traditional transactional e-commerce platform to being much more content-driven and focused on experiential social engagement, such as live streaming and virtual reality. As a result of this strategic shift, the LIMA survey found that Alibaba has experienced strengthened overall user acquisition and customer engagement. In fact, this year’s Alibaba Group Holding Singles’ Day generated a record ¥168.2 billion (\$25.3 billion) in sales, as the e-commerce giant worked with more traditional retailers to market to shoppers from at least 225 countries and regions. Tmall is now the No. 1 e-commerce site in the world with more than 450 million customers.



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tokidoki

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Known for its vibrant art and whimsical characters, tokidoki is a young brand that is hard at work establishing deep roots in the world of products and merchandising. With the world as its canvas, expect to see the globe become tokidoki-fied. **by AMANDA CIOLETTI**

Although, at its root, tokidoki means “sometimes” in Japanese, there is nothing intermittent or occasional about the pop culture-entrenched brand that has exploded in its short 13 years. In just little more than a decade, tokidoki has evolved to be a 365-brand that touches nearly every product category imaginable, from hard goods to home décor, apparel, accessories, novelties and soon to be hotels and animated content.

Founded in 2005 by Pooneh Mohajer, Ivan Arnold and Simone Legno, the brand’s creative visionary, tokidoki is now a machine unto itself, securing an enormous amount

SIMONE LEGNO
chief creative officer and co-founder, tokidoki
POONEH MOHAJER
chief executive officer and co-founder, tokidoki



of business, partnerships and collaborations, all the while remaining an independent entity—a quality that, this writer suspects, is instrumental to its success. After all, the brand’s bedrock is creative freedom.

tokidoki did not begin with the business partnership, but was born at the turn of the century from the mind of Legno, an Italy-based artist who was newly embarking on a career in media and advertising, and armed with an affinity for Japanese culture.

The first tokidoki website (circa 2001) was a showcase for Legno’s art and featured early iterations of now famous brand characters alongside flash-animated imagery and games. It drew more than 17,000 visitors per day, says Legno.

“The minute I saw Simone’s artwork—www.tokidoki.it was his professional calling card, and he was one of the best flash animators at the time—I literally began jumping up and down, screaming, ‘Who is this guy? We have got to sign this guy!’,” says Mohajer, now chief executive officer, tokidoki. “I had never seen anything like it. And from the get-go, I had a vision for a global brand that I could see very clearly—its future, its potential. We are far from what we are going to be, even still.”

Mohajer was by then a seasoned business professional, having had major success as the co-founder of color cosmetics brand Hard Candy, a revolutionary nail enamel company that ultimately sold to international luxury goods conglomerate LVMH, Moët Hennessy Louis Vuitton in 1999. At the time of tokidoki’s founding, Mohajer was onto her second venture, damnBRAND, a full-service e-commerce management firm. It is within those walls that tokidoki began to take shape, leveraging damnBRAND assets to ultimately fund the current business venture.

It is safe to say that Mohajer knows a hit when she sees it.

“One of the things that convinced me to change my life and share my art was the vision that Pooneh had,” says Legno, now creative director, tokidoki. “I saw that she was a dreamer like me, and a bit crazy, like me.”

“Simone and I were immediately aligned,” says Mohajer. “Now, everything I do, I see as a canvas for Simone’s artwork and his creativity.”

And what tokidoki does is a lot, both in the licensed consumer products space via partnerships and high-profile collaborations, as well as in-house manufacturing.

tokidoki, which borrows elements of Japanese “kawaii” (meaning exceptionally cute) and American street culture for its eye-popping artwork, all while infused with a European sensibility, hit the ground running first as a wholesale apparel brand, debuting at U.S. trade shows like MAGIC and Pool.

But the entrepreneurial spirit of the company

did not keep tokidoki confined to one category long. Arguably, the products that raised the profile of the tokidoki brand and elevated it to the status we know today was thanks to its first collaboration with handbag and accessories company LeSportsac.

“I still remember it like it was yesterday,” says Legno. “We designed a special, eye-catching box for LeSportsac and a few t-shirts that we printed on our nice printer—our printer was a major investment at the time!—and we just sent it over to them. It was so early in our business, we didn’t even have a tokidoki email address.”

But the timing was perfect, both for the brand to explode and in-market. Japanese-style art was having a major moment in fashion in the early 2000s, with everyone from Louis Vuitton partnering with artist Takashi Murakami for a celebrated range of luxury handbags, to Gwen Stefani’s L.A.M.B. and its kawaii-infused apparel range hitting runways and airwaves. LeSportsac leapt at the tokidoki offering, creating an instrumental partnership for both brands and ultimately setting the tone for tokidoki’s future business.

“The LeSportsac campaign was a great campaign—they did so much,” says Mohajer. “Almost overnight, we became reactive as a company, having to triage the opportunity that began to pour in. The collaboration gave us great exposure on a massive platform.”

The LeSportsac range was only intended to be a single season partnership. In actuality, it lasted nine.

The collaboration paved the way for future key partnerships, such as with Sanrio for now evergreen Hello Kitty offerings.

Kicked off in 2008, Sanrio tapped tokidoki to dress Hello Kitty in its kawaii creations in markets in the U.S., Japan and Brazil across items such as bags, accessories, vinyl toys, plush and more. The range further extended to a blind box collectible loyalty program, which made its way to 7-Eleven convenience stores in Hong Kong and Shell Malaysia, as well. That relationship continues



today with ongoing limited and seasonal collections.

Another early collaboration was with Marvel in 2009, and saw Legno re-imagine the iconic superheroes from the comic catalog in the tokidoki style.

And then there was Barbie.

“That was controversial and major,” says Mohajer of the team up, which dressed Mattel’s Barbie not only in tokidoki fashions, but dared to place tattoos across the icon’s famous façade—a first for the doll.

“The response from mothers was incredible,” says Mohajer. “They were saying, ‘Finally! A doll that looks like me, with tattoos like I have!’ It was a major shift.”

Mattel tapped tokidoki for the collaboration, giving Legno almost total power to create a Barbie in his vision. Of course, Mohajer chose her nail color.

“Collaborations are a part of our DNA and something that we will always do as a company, even if just because it is so fun to work with other artistic talents, whatever they may be,” says Mohajer.

Other partnerships have included Asics for its Onitsuka Tiger footwear collection; Sephora for a cosmetics and accessories range; Peanuts for apparel and accessories; renowned fashion designer Karl Lagerfeld for a broad swath of merchandise, from watches to vinyl figures featuring the impresario’s beloved feline, Choupette; Major League Baseball for tokidoki-fied caps, apparel, bags, drinkware, plush, tech accessories and novelties; and JuJuBe, Clek and ZoLi for children’s and infant accessories and hard goods and many more. More recently, tokidoki has been tapped to extend its brand

to iconic Italian furniture manufacturer Kartell for its Louis Ghost chair and the Lou Lou children’s chair, both of which launched in September; and

Activision



Blizzard, which will find tokidoki in a pairing for the “Overwatch” video game that kicked off at San Diego Comic-Con this summer. That partnership will continue to expand into 2018.

“We are proud to say that 95 percent of the collaborations we do are from companies that have reached out to us, including Lagerfeld, Peanuts, even Blizzard,” says Legno. “We choose collaborators based on the companies we are interested in working with and the opportunity they offer to expand the variety of our fans. We believe tokidoki is an art brand, and not a brand with a single target, but rather anyone that appreciates a positive brand and good design.”

Part of tokidoki’s success in collaborations (and licensing as well—the brand counts more than 100 licensees on its roster with product in all major global markets) is its distinct aesthetic.

“When you see Simone’s art, you instantly know it’s his hand—that it is tokidoki,” says Mohajer. “tokidoki is an interesting brand in that there is a unique artist behind it that is imagining these rich worlds, and there is something for everybody. Some of his work is mature and adult, and some of it is cute and kawaii, but appealing to children and 30-, 40- and 50-year-olds.”

That “something for everybody” appeal is what has allowed the brand to continue to mature and grow.

The brand has multiple design iterations that tap into every sort of personality, from the Cactus Friends collection for the shy and vulnerable, to the ‘Til Death Do Us Part range that’s darker in tone. Salary Man, a newer character, is a riff on the suited up 9-to-5’er, while the Unicorn and Mermicorn collectibles pop up everywhere from Comic-Cons to cubicles. The Moofia collection, which centers on the character Mozzarella, the leader of the Moofia, and his posse of milk and snack friends, is one of Legno’s earliest creations, and recently got a new spin-off, Moofia Breakfast Besties.

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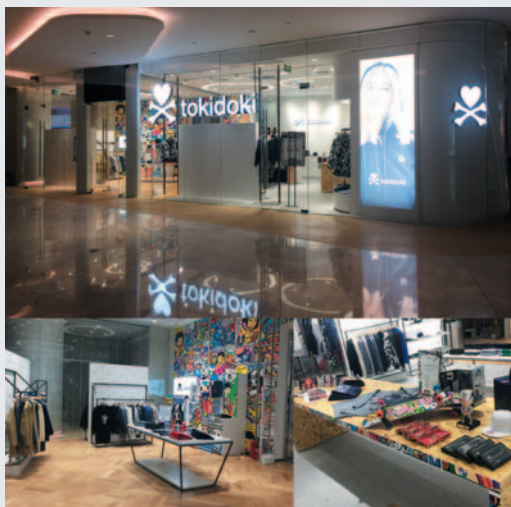


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tokidoki has also launched Neon Star by tokidoki. The “little sister brand” isolates age-appropriate characters for cost-friendly items such as bedding, plush, toys, cosmetics, accessories and collectibles for retail at Claire’s, Target and Toys ‘R’ Us.

Now tokidoki adopts a hybrid model for its licensing strategy, employing the mode in strategic categories and markets.

“For us, licensing is not designated by category,” says Legno. “In certain countries such as China or Thailand, where we are developing retail, we need partners. For timing reasons, for merchandising reasons, for

retail feeding reasons, we need to rely on licensees for local designs and to feed the local stores.”

“But it changes, and it is ad-hoc, however, it is all intertwined,” adds Mohajer. “In many markets, we sell both the product we manufacture as well as the product made by the local licensees in the same category. There’s a convergence.”

Current licensees include Aurora for plush (the U.S., the U.K., Europe and Southeast Asia), J. Franco for bedding (the U.S.), Blueprint for back-to-school and stationery (the U.K., Europe and the U.S.), Empire Apparel Group for apparel (Australia/New Zealand), Sestini for bags (South America), Dynasty for apparel (Russia), Chow Tai Fook for fine jewelry (China), World Look for apparel and retail stores (Korea), EZ-Link for metro cards (Singapore) and many more.

Leveraging licensing agents is also key to tokidoki’s global growth, employing firms such as Versa Licensing in Mexico and Central America, Crazy Bell in Europe, We Are Bloom in the U.K., Brand4Rent in Russia and CIS, Haven Global in Australia and New Zealand, Agosin in South America, Pacific Licensing Studio in Southeast Asia and Charactopia Licensing in China, Korea and Taiwan.

The brand has a strong global retail presence, as well. In North America alone, tokidoki can be found in more than 16,500 doors at brick-and-mortar and e-commerce sites including Hot Topic, GameStop, Barnes & Noble, Toys ‘R’ Us, Claire’s (also in Europe), Target, Walgreens

and Bed, Bath & Beyond. In the U.S., branded shop-in-shops also appear in Los Angeles and Las Vegas.

“We’ve recently launched a shop-in-shop in Vegas with Kappa Toys, which is living on the promenade between the Flamingo and Linq hotels. These are curated pop-ups that are independent, but the next step for us will be to identify a national chain to partner with,” says Mohajer. “These are great case studies that we’ll continue to do.”

Add to that placement in retailers like Primark, George, John Lewis, Bentalls, Harrods, Hamleys, JayJay’s, EB Games and Zing! across the U.K., greater Europe and Australia/New Zealand, and the retail outlook is positive. Dedicated retail environments are also in the works for Thailand.

tokidoki is also bullish about China, where it currently has 10 branded stores, including a flagship Shanghai location at the IAPM Mall. More locations are aggressively in development and tracking to open throughout the country.

And then there are tokidoki hotels.

In partnership with master licensee Charactopia Licensing, the first tokidoki dedicated hotel will open next year, with the goal to grow the chain concept as quickly as possible. The boutique hotels will be targeted toward young adults and feature exclusive, tokidoki-themed décor. To say Legno is excited about this venture is an understatement.

“For us as a brand, and myself as a designer, it’s going to be so fun to design this whole new presentation,” he says. “The hotel will be more refined and up-market for the young professional traveler, but presented in a way that is very cool.”

Content and animation is also a category that is on tokidoki’s radar. Deals are in the works and hope to be announced soon, says Mohajer.

“There’s a ton of opportunity there,” she says.

Other products in-market include wine, slot machines and much, much more.

Truly, the sky is the limit for tokidoki, a brand that just a little over a decade ago was in its infancy.

“I always say that it’s as though we’re a start-up with a competitive advantage, even though we’ve been partners since 2003,” says Mohajer. “We are still so far from where we see that we can be as a company. The amount of opportunity is exciting, and now it’s about figuring out the best way to move forward, and what that entails for us.” ©



LOOKING BACK AT LICENSING IN 2017

From Amazon's move into new categories to DHX's acquisition of Peanuts, a swathe of executive moves and more, these are the top trends, companies and brands that defined 2017.



by ERICA GARBER

This past year showcased an impressive number of headline-worthy events, including a series of acquisitions and consolidations, executive shake-ups at the top tiers of all sectors of the industry and collaborations that prove licensing is alive and well.

Meanwhile, retailers are looking to new ways to deal with recent shifts in the industry, with some companies restructuring and others opening new brick-and-mortar locations as well as altering their business plans.

Responding to Retail Realities

Faced with substantial debt and increased competition from big box retailers and e-commerce, Toys 'R' Us made headlines this summer when it announced it would reorganize its U.S. and Canada operations, filing for Chapter 11 bankruptcy in the U.S. and seeking protection under the Companies' Creditors Arrangement Act in Canada. The company plans to use the bankruptcy proceedings to restructure its debt and "establish a sustainable capital structure that will enable it to invest in long-term growth."

Amazon, meanwhile, continued to flourish. In May,

the retailer opened a new Amazon Books location in New York City's Columbus Circle. The Manhattan location follows physical book stores in Seattle, Wash., which it opened in late 2015, and locations in San Diego, Calif., and Portland, Ore. Eight stores have now launched across the country, with five more planned for the near future. Then in June, Amazon made another major move into brick-and-mortar with the purchase of U.S. grocery chain Whole Foods Market in a transaction totaling approximately \$13.7 billion.

Funko also expanded its presence this year with its first retail store, The Funko HQ. The 17,000-square-foot retail space features immersive experiences inspired by Marvel, DC Comics, *Star Wars*, *Harry Potter* and other fan-centric properties, as well as a host of licensed collectible products. Jumbo-sized Funko figures adorn the location, providing entertaining photo opportunities for visitors.

Fashion brands not to be excluded, Authentic Brands Group re-opened more than 500 Aéropostale retail locations across the U.S.

While companies like Amazon are breaking into the brick-and-mortar space, many brands are continuing to improve their e-commerce presence.

The world's largest licensor, Disney, introduced a new e-commerce destination, ShopDisney.com, that features an assortment of Disney, Pixar, *Star Wars* and Marvel products. The new product assortment aims to reflect the company's commitment to creating merchandise tailored to different demographics and features a score of categories including on-trend fashion and accessories, toys, home goods and collectibles. It also features co-branded products and high-end collaborations with the likes of Coach, Le Creuset, Spyder, Steiff, Rag & Bone and more.

Meanwhile, Hudson's Bay Company, owner of Hudson's Bay and Lord & Taylor, unveiled new initiatives to make the company more responsive to the changing retail landscape. Part of the company's plan includes integrating digital functions throughout the organization to deliver a better online experience, optimizing in-store services and more. Most recently, the Lord & Taylor brand partnered with Walmart to launch a flagship digital shop-in-shop on Walmart.com, set to debut next spring.

Supercell, the company behind the mobile games "Clash of Clans" and "Clash Royale," also made moves in the e-commerce space. In April, the company teamed up with Brand Access to launch an official e-commerce store that features a host of exclusive items from licensees like Dark Horse, Kotobukiya, PhatMojo and J!nx, among others.

Consolidation Continues

One of the largest acquisitions of the year was perhaps DHX Media's decision to take over the entertainment segment of Iconix Brand Group, including an 80 percent controlling interest in the Peanuts brand and 100 percent of the Strawberry Shortcake brand, for \$345 million.

The acquisition will most certainly impact DHX's ranking on *License Global's* Top 150 Global Licensors report, where it currently stands as the No. 60 licensor in the world with \$700 million in retail sales of licensed merchandise in 2016. The company recently

reported its first quarter earnings for fiscal 2018, which saw revenues increase to \$98.6 million, compared to \$53.8 million in the year prior, primarily driven by acquisitive growth from both Peanuts and Strawberry Shortcake.

Meanwhile, CPLG and Tycoon, two of the world's leading entertainment and brand licensing agencies, formed a global strategic alliance that leverages their respective strengths in their regional markets. The alliance created a combined network across EMEA, North America and Latin America, and covers all aspects of content, brand development, retail management, live events, branded promotions and more.

Looking at the fashion sector, the BCBG Max Azria Group sold the vast majority of its assets (including its IP, inventory and retail store leases) to Marquee Brands and Global Brands Group. Marquee will work to grow BCBG and related brands into new product categories, distribution channels and geographies, while GBG will market, promote, sell and distribute products bearing the BCBG brands. GBG also took over the brand's wholesale operations, select retail stores and its e-commerce platform.

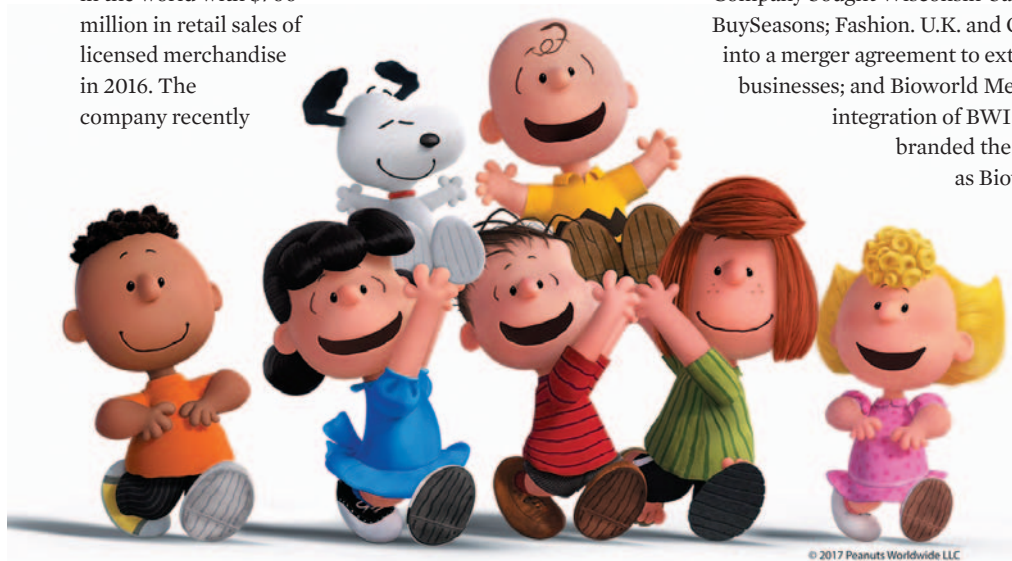
Authentic Brands Group purchased a majority interest in the Neil Lane fine jewelry and accessories brand. The brand management firm has made nine acquisitions over the past two years—including the brands of basketball stars Shaquille O'Neal and Julius "Dr. J" Erving, the American heritage brand Frye and teen retailer Aéropostale—and has more than doubled its retail sales of licensed products worldwide to \$5 billion over the past several years.

In a completely different category, Ferrero International completed its acquisition of Fannie May Confections Brands and the Harry London chocolate brands from 1-800-Flowers.com.

Several licensees also expanded their businesses with consolidations. Funko acquired the contemporary fashion accessories company Loungefly; Rubie's Costume Company bought Wisconsin-based costume manufacturer BuySeasons; Fashion. U.K. and Global Licensing entered into a merger agreement to extend the reach of both businesses; and Bioworld Merchandising finished its integration of BWI Merchandising and re-branded the newly combined company as Bioworld International.

Executive Shake-Ups

Similar to years past, 2017 saw a number of executive change-ups across all sectors of the industry. Possibly the biggest switch



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of the year was at Universal Brand Development, the world's No. 7 largest licensor, which saw Manuel Torres step down from his position as executive vice president of worldwide consumer products this summer. Joe Lawandus stepped in as Universal's senior vice president and general manager of consumer products in North America, and Marc Low's was promoted to senior vice president and general manager of international consumer products.

Meanwhile, Fox Television Group and Twentieth Century Fox Film appointed former DreamWorks Animation executive Jim Fielding to head its consumer products and innovation division. Shortly after, Fielding brought on five executives to help lead the company's consumer products division—Kirk Bloomgarden as senior vice president of international operations, Ann Buckingham as senior vice president of global creative and product development, Tim Erickson as senior vice president of global licensing and operations, Erin Morris as senior vice president of global retail business development and Eva Steertz as senior vice president of global brand business development.

Other major executive appointments in 2017 include:

- Tim Kilpin, a veteran Mattel and Disney executive, joined Activision Blizzard as chief executive officer and president of the company's newly-formed consumer products division.
- In March, National Geographic Partners tapped Juan Gutierrez to serve as the company's senior vice president of consumer products and live events, overseeing global licensing and location-based entertainment.
- Dollar General appointed Jason Reiser as its executive vice president and chief merchandising officer.
- Michelle Hagen joined Universal as senior vice president of consumer products and retail development.
- Warner Bros. Consumer Products named John Louie to the position of senior vice president of international.
- In May, Phil St. Jean, founder and chief executive officer of Trends International, stepped down after 30 years of leading the company. Bruce Morrison, president and chief operating officer, assumed CEO responsibilities of the company.
- Electrolux, the world's No. 20 largest licensor, promoted Lars Hygrel to the position of chief marketing officer.
- Jennifer Dodge returned to Spin Master to serve as the company's executive vice president of Spin Master Entertainment.
- In August, BuzzFeed hired Eric Karp to serve as its first head of licensing.
- Yehuda Shmidman stepped down from his positions at Sequential Brands Group, and appointed Karen Murray as its new chief executive officer.
- The Kirby Organization tapped Terri DiPaolo to head its

new licensing, endorsement and sponsorship division.

- Sanrio named Simon Gresswell to serve as chief operating officer of Sanrio GmbH, MML and SGA.
- Margaret Georgiadis joined Mattel as chief executive officer.

Other Top News in 2017:

- **WBCP, Hot Topic Win Big at LIMA Awards**—The LIMA International Licensing Awards, which took place during Licensing Expo in May, saw Hot Topic taking the top honor of Retailer of the Year for its Suicide Squad program and Warner Bros. Consumer Products walking away with three awards, including Best Character/Toy Brand for its “DC Super Hero Girls” property. Additional award recipients from the evening included Victoria and Albert Museum, “Five Nights at Freddy’s,” “Paw Patrol,” *Star Wars*, Corona and the NFLPA, among many others. LIMA also inducted three to its Hall of Fame in 2017: Allan Feldman, chief executive officer and founder of LMCA; Dell Furano, chief executive officer and founder, Epic Rights; and Cyril Speijer, former chief executive officer, Wavery Productions, and current co-principal, BN Licensing.
- **Global Merchandising Signs Mariah Carey**—In October, American singer-songwriter Mariah Carey appointed Global Merchandising Services to serve as the exclusive worldwide merchandise and brand partner for her brand Mimi. Through the agreement, Global Merchandising will create and extend the singer's brand across the lifestyle and fashion sectors. The agent will also create tour ranges and merchandise programs for retail and e-commerce.
- **“Looney Tunes’ Steps into Converse”**—In March, WBCP and Converse teamed up for a sneaker collaboration featuring classic characters from the “Looney Tunes” franchise. The Chuck Taylor All Star “Looney Tunes” collection includes high- and low-top options featuring Bugs Bunny, Tweety and the Tasmanian Devil. The collaboration is also an example of the recent nostalgia trends, which has seen a resurgence of classic brands across multiple categories. ©



The Influentials



This inaugural honor recognizes those that have impacted licensing in a marked way. This year, as we get ready to ring in 2018, *License Global* is proud to honor 19 women from 18 companies that have greatly influenced the business of licensing.

Allison Ames

Not many people know what a “radome, anechoic chamber” is, but Allison Ames does. Ames, chief executive officer of leading licensing agency The Beanstalk Group, started her career as a marketing associate for Bairnco Corp., a Fortune 500 that owns industrial- and military-related companies.

After working her way up the ranks at Bairnco, Ames decided she wanted to shift to consumer-facing marketing. She moved to a new company that designed licensed lighting and other home-related products, where she got her first taste of product development and manufacturing. It was in the course of that job that she went to a pitch meeting at The Beanstalk Group and found the company where she would stay for the next two decades.

“The moment I walked into this very creative and unusual company, I knew I wanted to be a part of their team,” she recalls. “It was the perfect blend of a fast-paced, entrepreneurial setting with a diverse portfolio of world-class brands that anyone would be proud to work with. It’s been the most rewarding and continually evolving 20 years of my career.”

At Beanstalk Ames also found her mentor, co-founder and chairman Michael Stone.

“Not only did I learn from a true master about the complexities of licensing, brand strategy, negotiation and other competencies, through Michael’s support and guidance, I also learned other valuable lessons about leadership, management and driving culture,” she says.

Over the course of her career at Beanstalk, Ames has worked on many memorable projects, but there are a few that stand out.

“What I love about licensing is starting with a clean sheet of paper and developing a strategy to extend these famous brands and personalities into other categories that are aligned with their goals.”

This was especially true for the HGTV brand, which came to Beanstalk as a completely blank slate. Now it is one of the leading licensors in the world.

“What made this program so interesting was the challenge of translating a broadcast network into a consumer products brand,” Ames says. “HGTV, like any broadcaster, provides a service... It didn’t sell any products or even have a logo that could effectively be used for product. Our strategy was to convert HGTV’s equities of smart, solutions-based design into a line of products for the home.”

That started with designing a logo and brand architecture, which Ames says took nearly a year. Beanstalk led the charge and it paid off—the HGTV Home brand is now licensed into a plethora of categories including paint by Sherwin-Williams and a furniture line at Bassett’s that, in addition to products, also includes design consultation.

To understand Ames’ attitude toward business, one need look no further than her favorite quote from Abraham Lincoln: “The best way to predict your future is to create it.”



ALLISON AMES
chief executive officer, Beanstalk

Adina Avery-Grossman

While most people know Adina Avery-Grossman as the founder and partner of licensing agency Brandgenuity, she has another claim to fame—she led the Kraft Foods team that put the “blue” in Fruity Pebbles.

“While at Kraft I was the senior brand manager on the successful Pebbles franchise, a ‘Flintstones’ licensee,” she explains. “The Flintstones’ were a true differentiator for us as we competed day-to-day with Kellogg’s Fruit Loops and General Mills’ Trix. I learned everything I know about branding, positioning, marketing, product development, quality testing, packaging development and market research at Kraft.”

Avery-Grossman spent 10 years at Kraft Foods before moving into brand licensing. Then in 2003, she formed Brandgenuity alongside Jay Asher, Louis Drogin and Andrew Topkins. The agency has become one of the biggest in the world with a client list that includes the NFL Players’ Association, BMW, Arm & Hammer and MGM.

Avery-Grossman prides herself on her expertise in launching retail exclusives, pointing to a DTR deal she developed between Food Network and Kohl’s as one of the highlights of her career.

“We were there from the beginning to help drive the first conversations about agreement negotiation, to oversee the first products developed and creation of the first packaging mechanicals,” she says. “We have helped Kohl’s and Food Network to launch thousands of products, ensuring that we had the right processes and tools in place, and that teams on both sides

were sharing information and insights at the right moments. This required a lot of love and attention, and we took the job of protecting the Food Network brand very seriously.”

Avery-Grossman clearly takes her work as a brand steward very seriously for all her clients, ensuring not only that her work builds the brands in her roster, but that it does so in a way that makes sense.

“I’ve never met a brand I didn’t love,” she says. “I can fall in love with any brand, because I see the connection that every brand has with its consumers. It’s a challenge because a great brand does not always lead to a great (or good) licensing program. My constant challenge is to think critically about what the opportunity could truly be.”

And Avery-Grossman never lost touch with her roots. Brandgenuity has become a category expert in the food and beverage space, with a portfolio that includes brands such as Budweiser and Welch’s. So it’s no surprise that, when asked what brand she would like to work with, it comes from that same category.

“We would love to work on a brand that combines food and our favorite beverage, coffee, like Dunkin’ Donuts or Starbucks,” she says.



ADINA AVERY-GROSSMAN
partner, Brandgenuity

CONGRATULATIONS

Rosa Zeegers on
being named one of
License Global's First
Annual Influentials!



Leigh Anne Brodsky

Over the past 30 years, Leigh Anne Brodsky has worked on some of the biggest media properties in the world, from Nickelodeon's "SpongeBob SquarePants" to the Peanuts brand.

In her current role as executive vice president at Discovery Global Enterprises, Brodsky works to "fuel the overall Discovery brand by igniting the growth of super fans with authentic experiences and expand the company's content and brand footprint across the world."

Inducted into the LIMA Hall of Fame in 2011, Brodsky's career is peppered with success after success. Prior to Discovery, she served as managing director of Peanuts Worldwide/Iconix Entertainment where she oversaw the company's global entertainment business, built the largest-ever retail footprint for the Peanuts property and expanded the Iconix Entertainment division's global portfolio.

She joined Iconix from Nickelodeon where she worked for 12 years, eventually taking on the role of president of Nickelodeon Consumer Products from 1999 to 2011. During that time, she built Nickelodeon Consumer Products into the world's No. 1 TV-based licensing business, and the company was named Marketer of the Year by *Ad Age*.

"For 'SpongeBob SquarePants,' we took a risk and went older with the merchandise, which paid off through a partnership with Cindy Levitt at Hot Topic," she says. "Additionally, I helped grow 'Dora the Explorer' into a top toy brand, working hand-in-hand with Brown Johnson, Nickelodeon's head of development and production, and toy partner Mattel

to grow the brand's reach globally."

Now, she's looking to do the same for Discovery.

"I am so excited for Discovery's next big thing," she says. "We are in the process of launching Discovery#Mindblown, Discovery's STEM-based kids merchandising program, based on our network's educational and mind-blowing content."

One thing's for sure, if anyone can blow our mind, it's Brodsky. But that's not to say that her work is without its challenges.

"Challenges are, well, challenging, but they are also the fun part. Some of the challenges we face are planning far out enough, communicating to a complex global company and creating breakthrough products supported by smart marketing. The best way we overcome them is by partnering with colleagues, and empowering my team to be creative and collaborative."

Looking back on her career, there are three people that Brodsky points to as mentors who empowered her as she was moving up the ranks: Her first boss, Mike Georgeopolis of United Media; Jeff Dunn, her boss at Nickelodeon for six years; and Paul Guyardo, her current boss at Discovery.

As she reflects on what she learned from these three mentors and in her own three decades of experience, Brodsky can boil down her keys to success into three simple tips: 1. Listen, 2. Be Resilient and 3. Don't Burn Bridges.



LEIGH ANNE BRODSKY
executive vice president,
Discovery Global Enterprises

Elise Contarsy

Elise Contarsy began crafting her career in the home textiles industry, however, in the late '80s and early '90s, the American mills dissolved, and with them, their brand names.

Contarsy took advantage of this opportunity and took on her first role in licensing, which was at the first licensee for Calvin Klein Home.

"When I was working at Calvin Klein Home, several of my friends from college were working at *Martha Stewart Living* magazine," says Contarsy. "They called me to see if I would be interested in interviewing for a home textile project. I liked the idea of moving from the licensee side to the licensor. I joined *Martha Stewart Living* just as it had signed the Kmart licenses and spent 8 years building that business, as well as multiple other licensing programs for Martha Stewart."

Today, Contarsy is the vice president of brand licensing at Meredith, the world's second largest licensor, and is responsible for a number of media brands including *Better Homes & Gardens*, *EatingWell*, *Shape*, *Family Circle* and *Allrecipes*.

While Contarsy proved her potential through hard work and dedication, she cites her mentors as those who have helped in shaping her career trajectory as well as her understanding of creating branded businesses.

"I have had several mentors in my career, and they have come in pairs," says Contarsy. "Working for Patsy Pollock and Amy Rosenblatt at Calvin Klein Home prepared me for working with Martha Stewart and Sharon Patrick at

MSLO. All were women who successfully combined business objectives with financial metrics and creative activities to create branded businesses from the ground up."

Although her mentors prepared her for a score of possibilities in the industry, her current position at Meredith has brought on a host of new challenges, including educating colleagues on what licensing can (or cannot) do for the company.

"For many people who manage licensing businesses inside companies where licensing is not the core business, there are challenges to gain widespread understanding of what licensing can and cannot do for the enterprise," explains Contarsy. "Making sure that the licensing activities are additive, and that they are perceived across the organization as such is key. Fortunately, our leadership at the most senior level is supportive of licensing, and this has helped in telling the Meredith brand licensing story internally as well as externally."

Contarsy's licensing expertise, support from Meredith's top-level executives and background in the home textiles, fashion and lifestyle categories are sure to continue to keep Meredith on top of its game as the world's second largest licensor.



ELISE CONTARSY
vice president, brand licensing,
Meredith Corporation



branddgenuity

new york • london • munich • hong kong

15 YEARS

We congratulate our own influencer and founding partner,

ADINA AVERY-GROSSMAN

for her many contributions to the licensing community.

And, we thank all of our industry partners who have helped make our first 15 years such a blast!



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WONDER WOMAN

TO EACH INFLUENTIAL WOMAN
HONORED THIS YEAR
CONGRATULATIONS
FROM ONE
WONDER WOMAN
TO ANOTHER



Angela Farrugia

A deep understanding of retail has been key to Angela Farrugia's success.

Farrugia got her start as a buyer at a chain of accessories stores. She then took a job as licensing manager for apparel and home at CPLG, where her emphasis on retail relationships was invaluable.

"When I started, no one spoke to retailers with regards to licensing decisions. I had absolutely no idea what was required of me, and probably came close to being fired a number of times," she says. "I just couldn't figure out why licenses were given and decisions were made without understanding a retailer's needs. So, I sat down with my CEO at the time, David Cardwell, and told him we were not going to renew any of the main licenses we had in apparel. He supported me, which was a huge risk. Instead, I connected with retailers in all the main channels and created deeper relationships, understanding that if the buyer/supplier relationship is right, all else follows. My figures were up over 300 percent that year, and I never looked back."

Farrugia took another risk in 1996—she founded The Licensing Company with her business partner Melvin Thomas.

"We had a very clear vision of what we wanted TLC to be—the place where the best brands in the world would want to be represented, and the best people in the industry would want to work," says Farrugia.

Another key to Farrugia's success? Her management style.

"We led a business that grew strong by engaging people's hearts and minds.

One of TLC's philosophies was to get out of the way and let people grow. Management is very often the inhibitor of their own business growth—we learned very quickly that if we let people thrive, they do just that," she says.

TLC is now, through a series of acquisitions, part of CAA-GBG, the largest licensing agent in the world. The group operates 24 offices, generates more than \$12.4 billion in retail sales and has 60-plus direct-to-retail agreements around the world. And the growth won't stop there, if Farrugia has anything to say about it.

"I am passionate about the industry and how we can push it forward. This has required a constant state of reinvention and the ability to see a much bigger picture," she says. "CAA-GBG goes from strength-to-strength and is well placed to take the business to next level. We are now becoming more influential with brands and retailers on every level, as we start to partner with them at various stages of the journey, including creating frameworks for global distribution. Every day we open a new exciting chapter, and I continue to be motivated by the challenges of the retail world."



ANGELA FARRUGIA
executive vice president and
group managing director, CAA-
GBG

Nancy Fowler

Nancy Fowler's introduction to licensing happened in an unsuspecting way—while working at Charan Industries, a then subsidiary of Toy Biz Toys. A few years later, she joined promotional agency Marquee Promotions, which had recently acquired the rights to Paramount's local licensing business, and gave Fowler her first shot at working with "Star Trek."

As Fowler puts it: "My fate was sealed."

After a stint as director of marketing for SEGA of Canada, Fowler found herself again with an opportunity in film and television.

"About a year later, I was asked to set up the Canadian office of Viacom Consumer Products Canada, Paramount Pictures' new licensing division," says Fowler. "The chance to set up an office from scratch was a special opportunity.

"After several years, I accepted a global licensing position for a local media company called Alliance Entertainment. This was my first step into licensing outside of Canada—I loved it," continues Fowler. "Then Paramount called again! This time the opportunity was to re-locate to Los Angeles to take the position of vice president of international licensing. I accepted and soon found myself driving through the famous Paramount Pictures studio gates each morning."

After several months on the job (and finding herself working on the "Star Trek" brand for a third time), Fowler re-located to New York to manage the transition of the Hamilton Projects merger into Viacom Consumer Products. Once she returned to L.A., she was promoted to vice president of worldwide licensing, which saw her work on licensing programs for brands like "Star Trek," "South Park," *Tomb Raider*, *Forrest Gump* and *Mission Impossible*.

"I recall being burned out from the past year and seriously considered declining the promotion but decided it was a significant opportunity and I had to rise to the occasion," she says. "I'm glad I did as I had the opportunity to work with some extraordinary licenses and amazing people."

Around the time Paramount offered Fowler a contract renewal, Andy Heyward, who was then serving as CEO of DIC Entertainment, approached her to help reboot American Greetings' Strawberry Shortcake franchise. At DIC Entertainment, Fowler stepped in as president of worldwide consumer products, overseeing the home entertainment, licensing and international TV distribution businesses.

In 2006, Fowler paired with her partner Steve Fowler to open The Licensing Shop.

"TLS has proudly represented CBS Consumer Products for more than 10 years, and I am thrilled that I have somehow managed to work the 'Star Trek' licensing business on and off for 25 years," says Fowler.

Since 2011, TLS has also represented Moose Toys' licensing-out business.

"I know it's hard to believe now, but Shopkins was not always a slam-dunk license to sell," she says. "The common push back was that toy brands generally don't translate into certain categories such as apparel. We had many great licensees on board for almost a year before we could get a t-shirt partner to sign on!"

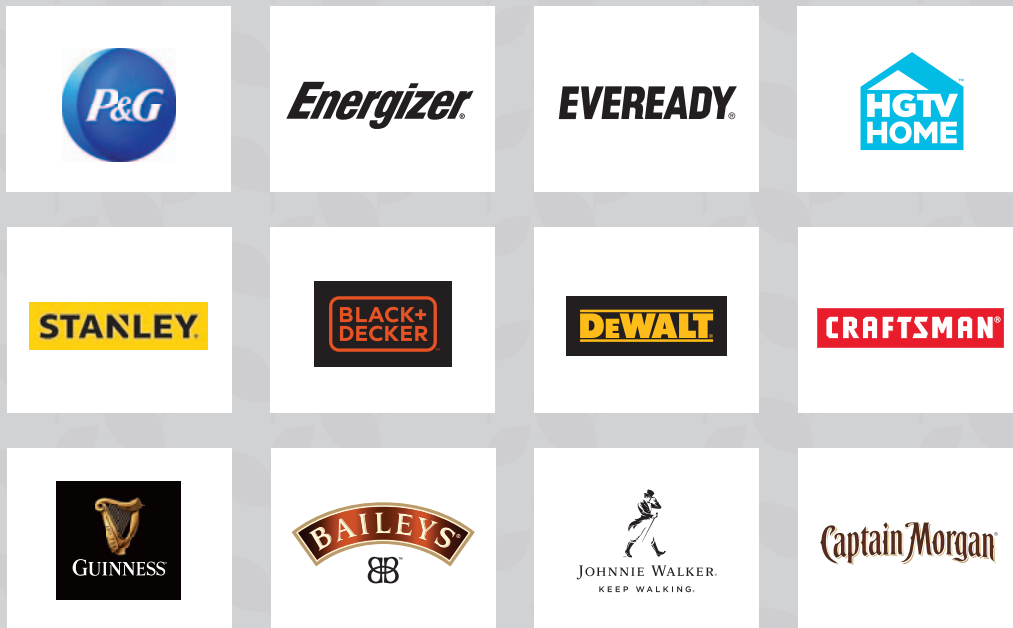


NANCY FOWLER
principal, The Licensing Shop

CONGRATULATIONS!

We are proud to honor
Allison Ames
and all of the Influential Women
who have impacted the business of licensing.
Thank you for all you have done for our industry.

From Beanstalk and our Client Partners



Janet Hsu

“A true leader is not about a single individual, but the knowledge and experience of the team,” says Janet Hsu, chief executive officer, Saban Brands.

Hsu’s words are wise, particularly for this executive who has worked all angles of the retail business throughout her career, enabling her to bring unique insight and experience to an industry that relies on varied expertise across multiple disciplines.

Hsu began her career at retailers Bloomingdales and Lord & Taylor in roles in buying, merchandising, marketing, sales and promotions. From there, Hsu went on to Mattel and MGA Entertainment, serving as director of sales and senior vice president of consumer products, respectively, and gaining expertise in product development and licensing along the way.

Following MGA, Hsu transitioned to Sanrio, where she served as president and chief operating officer for nearly eight years.

“What’s unique about my background and what has shaped my career is that I have sat on every side of the desk,” says Hsu. “This has been instrumental in developing my strategy for driving brand innovation, expansion and diversification.”

This diversified business experience has taught Hsu numerous lessons, but none so much as to believe in oneself and the vision of the brand.

“Throughout my career, especially early on, I learned the value of fighting for what you believe in. Whether it’s unexpected, unconventional or new, those are often the things that drive brand engagement and growth,” says Hsu.



JANET HSU
chief executive officer, Saban Brands

Her past successes, including the momentous global growth evergreen Hello Kitty experienced under Hsu’s direction at Sanrio, has informed her current role at Saban Brands.

“One of the most pivotal experiences that has shaped my career was the strategy I implemented at Sanrio to reinvigorate the Hello Kitty brand, really unlocking its DNA to transform and modernize the franchise,” says Hsu. “We implement a similar marketing strategy here at Saban Brands for our IP, especially for ‘Power Rangers,’ and that has delivered impactful results like in collaborations and partnerships with Kith, Glam Glow and Bobby Abley.”

In just two years, Hsu has achieved major career moments at Saban Brands: 2017 saw the launch of the *Power Rangers* feature film, and with it, a robust consumer products program. 2018 is looking equally as optimistic, says Hsu.

“2018 is going to be a momentous year for Saban Brands, from celebrating ‘Power Rangers’ 25th anniversary to launching a new franchise ‘Rainbow Butterfly Unicorn Kitty’ in the fall, to incubating new content and identifying strategic partnerships both for the brands and the business. We are enthusiastic as ever about the future of Saban Brands and its IP.”

Kathy Ireland

Since its founding in 1993, kathy ireland Worldwide has grown to become a lifestyle empire, ranking No. 26 on *License Global’s* Top 150 Global Licensors report with \$2.6 billion in retail sales.

And to think, it all began with socks.

“I started our brand in 1993 as an aging, pregnant model at the kitchen table,” says Ireland. “I was offered an opportunity to model socks. I rejected that offer and instead proposed a partnership. We celebrated when that became our first licensing deal, and we celebrated again when we sold our 100 millionth pair of socks!”

Those socks launched into retailer Kmart, giving kiWW the platform to expand its business. Today, kiWW counts countless categories among its portfolio drivers including fine jewelry, handbags, accessories, intimate apparel, sleepwear, bridal fashion, pets, furniture, health and beauty and much more. In 2016, kiWW also launched TV programming, “Worldwide Business with Kathy Ireland” and “Modern Living with Kathy Ireland,” both of which air in more than 50 countries around the world. kiWW also has a strategic alliance with American Family Insurance, real estate ventures, Kathy Ireland Exhibits, vacation events, design studios and more.

What could possibly be next?

“Growth based on expansive creativity,” says Ireland. “Our Millennial team is racking forward and those of us that have been together for 28 years refuse to slow down! Coming are retail solutions with Firefly, more fashion, more real estate and more insurance. Our non-profit work is critical, as is working

with Level Brands, our environmentally and socially-conscious licensing, marketing and experiential entertainment company. kiWW will never be a public company, and Level Brands allows the world to experience our branding and licensing strategies.”

Ireland says that it was lessons from her parents and some of the world’s foremost business leaders that have formed the rock-solid foundation she enjoys, offering sound advice along the way.

“The lessons and love from my mom and dad will always live in my heart and mind. They made their three daughters believe that anything was possible,” says Ireland. “I’ve also been fortunate to count such incredible icons as Elizabeth Taylor, Warren Buffett and Irv Blumkin, one of the most famous titans of the furniture industry, as mentors. Warren Buffet once asked me, ‘Why stay in fashion? What about expanding to home? There’s more stability.’ That was great advice. And it was sweet when Mr. Blumkin purchased everything in our first home collection.”

Another tenant Ireland lives by? Under-promise and over-deliver.

“My dad said, ‘If the customer expects their paper on the driveway, leave it on the front porch.’ That advice has proven to be invaluable in entrepreneurship and business. At kathy ireland Worldwide, we apply it every day,” she says.



KATHY IRELAND
chief executive officer and chief designer, kathy ireland Worldwide

**CONGRATULATIONS TO PAM KAUFMAN AND ALL OF THE
WOMEN INFLUENCERS RESHAPING THE LICENSING INDUSTRY!**



nickelodeon™

Debra Joester

With a deep background in entertainment, Debra Joester knows licensing. Joester understands that business evolves and tastes may change, so you never know where the next big thing will come from.

“Developing and executing successful licensing programs is a complex process with a lot of moving parts,” says Joester. “Even after all of my years in licensing, I continue to gain knowledge and insight with every project we execute. The fact that many of the most successful programs that I have developed were initially greeted with a lack of enthusiasm is pivotal to how I approach opportunities.”

Throughout her career, Joester has extended and built brands for a wide and diverse array of properties, beginning first in music.

“I spent the first 10 years of my career in the music industry, and those years were highly influential,” she says. “It taught me about pop culture, evolving trends, the importance of engaging consumers on an emotional level, marketing with limited budgets and, with the advent of MTV, the importance of capturing a performer’s unique personality on video. I also had my first experiences with licensing, developing and overseeing the sale of tour programs, t-shirts and other merchandise.”

That experience eventually led Joester to take on the role of associate producer and special projects manager for the film *Pumping Iron II: The Women*, which in turn brought her to Hamilton Projects and a more formal role within the licensing industry.

“Fourteen years after I joined the company, I became president of Hamilton Projects. Over the next decade, I took the agency to new heights, building innovative global licensing success for ‘Beverly Hills, 90210,’ Jeep, ‘South Park,’ Dr. Scholl’s and Miller Brewing.”

In 1999, Joester founded licensing agency The Joester Loria Group with partner Joanne Loria and kicked off 18 years of continued success, building brand programs for household names such as Discovery, Animal Planet, Kellogg’s, Corona, Jack Links and Pepsi; pop culture phenomena including “Care Bears” and “Annoying Orange”; and with one of the world’s most recognized publishing franchises, The World of Eric Carle.

For Joester, it’s the properties that aren’t obvious “wins” that she sees as gold mines, with relationships at the heart of all she does.

“We continue to embrace opportunities that don’t have the obvious hallmarks of a ‘hot property,’ and find innovative ways to establish long-term success,” says Joester. “Also pivotal has been learning how to effectively partner and represent our clients. We work closely with all our clients, provide extensive analysis and data on their programs as well as market trends, and have built great relationships based on trust and transparency.”



DEBRA JOESTER
president, *The Joester Loria Group*

Pam Kaufman

A common thread that runs through everything Pam Kaufman does is a sense of joy and fun. But really how can it not be when you are chief marketing officer and president of consumer products for Nickelodeon?

This general sense of excitement for the business of marketing and consumer products is one that has been with Kaufman since the beginning, in one of her first industry roles at a company called Equity Marketing.

“That role was a really definitional point for me,” says Kaufman. “I learned a couple of things. First, I learned how much fun this business is. It was a blast to work on something in its infancy and then watch it become so big and so connected to popular culture. Secondly, I modeled myself after Joe [Conforti, her early mentor at Equity Marketing]. He brought such energy and excitement and leadership to the organization and account, and that is something that I have kept with me throughout my entire career.”

In a business based around relationships, this energy and organization is crucial to success and something that Kaufman credits to one of her career highs—a major brand partnership between Nickelodeon and global fast-casual restaurant, Burger King.

“When I joined Viacom, I worked as a vice president in integrated marketing and I brought with me my contacts from my accounts,” she says. “I had a great relationship with the person that ran the Burger King business, and it was a perfect storm of timing. We were getting ready to launch the *Rugrats* movie and we didn’t have any partners. I called up my friend at Burger King, and I said, ‘How would you like

to do this?’ He immediately jumped on the opportunity and we partnered on a multi-million dollar sponsorship. It turned out to be one of the biggest sponsorship deals Viacom has ever done.”

Since, Kaufman has spent her career working on new and evergreen Nick brands such as “SpongeBob SquarePants,” which Kaufman has extended into uncharted territory, like high fashion with partners Jeremy Scott and Moschino.

It’s a strategy she continues to follow with new and emerging brands, such as for the new bilingual property “Canticos” or social influencer and TV star JoJo Siwa.

And while Kaufman’s role has continued to grow at Nickelodeon, now overseeing a team of more than 500, her commitment to evolution, growth and innovation, all with a sense of grace and respect for those around her, is critical in driving the business of licensing and consumer products forward.

“Wherever my career goes, I want to be remembered as the person who was kind, nice and fair,” says Kaufman. “In the end, I don’t think people actually remember the person with the loudest voice or the person who tries to do everything perfectly. They remember how they were treated, and that is everything to me.”



PAM KAUFMAN
chief marketing officer and president, consumer products, *Nickelodeon*



THE LICENSING SHOP
A BRAND MANAGEMENT COMPANY

TLS CONGRATULATES NANCY
ON BEING NAMED ONE OF THE INFLUENTIALS
AND SALUTE HER 25+ YEAR CAREER IN LICENSING!

AS SHE SAYS,

“THE BEST IS YET TO COME!”



June Lee

In 2009, Lee joined ROI Visual and established the company's international business unit. Today, she is known throughout the licensing industry as not only the company's head of global business, but also as the media company's sales and brand marketing director.

During her nine-year career with ROI Visual, Lee has worked on building the animated series "Robocar Poli," the first global project for the company, as well as the internal structure of the larger company.

While she's been hyper-focused on "Robocar Poli" in recent years, she is also gearing up to launch several new projects for ROI Visual, which will be unveiled in 2019.

"I joined this business when both the media and licensing industries started changing," says Lee. "Since 2009, I've witness it change rapidly year by year. It's difficult to keep chasing the changing market, catching the right moment and doing the proper action. I think I was lucky—from the beginning, I've worked with high-quality content. My work [on 'Robocar Poli'] won at the MIPJunior Licensing Challenge in 2010. Since then, I have met lots of good partners and have learned a lot of things about—and beyond—the media and licensing industries. I believe all the steps that I have made so far must be a critical moment or meaningful milestone for

me and [ROI Visual's] achievements."

In recent years, Lee has utilized what she learned to further expand the "Robocar Poli" brand across multiple categories worldwide. Recent highlights from the "Robocar Poli" licensing program include live shows in Taiwan, Singapore, Russia, CIS and the Baltics; a slew of promotional partnerships that promote traffic safety, information security and more in various countries; and a raft of products spanning card games, puzzles, publishing, toys, kids' tableware and much more.

Although she continues to make strides forward in her career, it's Lee's thoughts on content and consumer products that will continue to inspire new, innovative programs for fans worldwide.

"I believe that all content has a reason why it was created," says Lee. "I try to find the essence of the content and maximize it to make it bright and meaningful to the consumer. I believe it's the best thing that I can do for the people who create the content and the people who enjoy it."



JUNE LEE
*head of global business and sales
and brand marketing director,
ROI Visual*

Pam Lifford

Like most that work in the consumer products business, Pam Lifford credits her early career experience in helping to build a round picture of an industry that calls for varied and diverse skills that draw from multiple sectors.

"My early experience was instrumental in preparing me for my current role," says Lifford, who now serves as president of Warner Bros. Consumer Products. "Nike was a true game-changer for me. I was part of a small scrappy team where 'Just Do It' wasn't just a tagline, it was belief system that allowed me to be brave, hone my instincts and take smart, calculated risks. That is where I learned to truly trust myself. Those experiences were critical in helping shape the person I am today and my approach to business."

For Lifford, her early career was spent on the vertical side of the consumer products business, first at Nike, then Road Runner Sports. In 2000, Lifford moved over to entertainment and joined The Walt Disney Company.

"Joining Disney was a critical step in my career. It was there that I had to leverage everything I learned up to that point. I adopted the frame of mind that I was capable in any circumstance and, even if I was uncomfortable, I could pull on my experience and pretty much accomplish anything," she says.

While challenging and maybe even at times uncomfortable, the experience that Lifford gleaned at Disney became instrumental in the leader she is today, allowing her to learn the intricacies of operating within a big business environment while still maintaining her creative, entrepreneurial spirit.

It's this optimism and critical eye that now has Lifford forward-

thinking in her role at WBCP as she strategizes the future of global powerhouse properties such as *Harry Potter*, "Looney Tunes," Hanna-Barbera, the DC Comics brand and many, many more.

"This is an exciting time to be in consumer products. Digital is revolutionizing the way consumers live, from the way they consume content to how they shop and ultimately including how they express their loyalty. We have a fan-focused approach to the business, so we are constantly challenging ourselves to re-examine our consumer engagement strategies," says Lifford. "The complexity of staying relevant and authentic through brand experiences is your point of differentiation, something only a brand can deliver on, which I believe is going to be a key factor to our success at Warner Bros. where we have some of the richest brands in the industry. Today's consumers are shrewd, you have to earn their loyalty. It's the future that really excites me, so I am enjoying ideating around what's happening next and how to continue evolving our business to truly engage consumers and deliver our brands in the right environment."

But what is the best leadership advice she's ever received?

"Early in my career, I learned the value in failure," she says. "You may not always succeed in the traditional sense, however, if you take the time to reflect, there is always a learning to glean that will make you more resilient, adaptive and wiser for the next challenge."



PAM LIFFORD
*president, Warner Bros.
Consumer Products*

IMG



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— ON BEING NAMED TO “THE INFLUENTIALS” —

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Allison Ames- President, Beanstalk Agency

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Leigh Anne Brodsky- EVP Discovery Global Enterprises,
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Marilu Magsaysay Corpus- CEO/Founder, CLICK!

Angela Farrugia- EVP/Group Managing Director, AA-GBG
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Nancy Fowler- Principal, The Licensing Shop Inc. (TLS)

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June J Lee- Head of International Business, ROI VISUAL

Pam Lifford- President, Warner Bros. Consumer Products U.S.

Joanne Loria- Co-Founder, Joester Loria Group

Carla Peyton- SVP Licensed Consumer Products, BBC America

Kerry Phelan- EVP of Global Franchise Management and
Strategic Partnerships, Lionsgate

Maca Rotter- President & CEO, La Panadería Licensing &
Marketing

Miki Yamamoto- SVP, IMG Japan

Rosa Zeegers- EVP of Consumer Products and Experiences,
National Geographic

Joanne Loria

“Never be afraid to fail, because without taking the risk, you could never truly understand success.”

Joanne Loria learned this key lesson in both leadership and life during the early days of her career working under Paul Harris at Columbia Records. While co-founding The Joester Loria Group nearly 20 years ago is certainly proof enough that Harris’ advice struck a chord, her past positions with Columbia Records, Hanna-Barbera and Hamilton Projects also showcased her dedication, determination and drive to succeed.

Loria began her career in marketing at Columbia Records’ direct mail division, Columbia House—a role that led her to the world of licensing.

“In the early ‘80s, there was an abundance of tour shirts that Columbia Records had remaining in inventory. I was asked to run an ad in our monthly *Record Club* magazine and offer the shirts for sale,” says Loria. “Within two weeks, the inventory blew out. We tried again with a few other tour tees from our Columbia artists, all with the same result. I had come to realize that outside the concert venue, there was no place for fans to purchase authentic tour merchandise. I anointed myself (with the blessings of the Corner Office) Queen of Music Merch and began procuring and marketing band merchandise—tees, posters, hats, lanyards, etc.”

Loria eventually left Columbia to join Hamilton Projects, where she served as vice president of licensing for Hanna-Barbera Productions and first met Debra Joester, her now partner. But when Hanna-Barbera restructured,

Loria was re-located to Los Angeles.

“In the mid-’90s, I received a call from Debra Joester, who had become president of Hamilton Projects and was building an amazing agency inside the walls of Viacom, its parent company,” says Loria. “She offered me the opportunity to come back home to New York as her senior vice president and manage the business with her. The rest was history.”

While Loria has taken many risks in her career, she cites one particular property as pivotal: “South Park.”

“Back in the late ‘90s, I received an email and video from Comedy Central, asking if our agency would be interested in representing a then unheard of, quirky property called ‘South Park,’” says Loria. “The show’s profanity, dark, surreal humor and TV MA rating on a fledgling cable station made it a risky gamble for mainstream licensing, but I showed it to Deb, and after quickly trying to wrap our arms around what we saw, we signed on knowing that we would either go down in flames or blow the paradigm out of the water. It was a real industry game changer. It showed how important it was to always look to the fringes because you never know where the next unexpected culture-bending trend was going to come from.”



JOANNE LORIA
executive vice president and chief operating officer, The Joester Loria Group

Marilu Magsaysay Corpus

When Marilu Magsaysay Corpus was 10-years-old, her brother gave her a Peanuts book that kicked off a lifelong passion for the Peanuts brand (Snoopy in particular) and led her to her career in licensing.

“Being in the Philippines, a country thousands of miles away from California, it seemed to me highly unlikely that I could one day work for Charles Schulz. Still, my dream was to work for him when I grew up. In 1984, I applied for a job at United Media, the company that owned the Peanuts property, hoping that they had an opening where I was qualified. After a few weeks, I was elated when United Media called me. After four gruelling weeks had passed, the good news came—I got the job! To say that I felt ecstatic, is an understatement.”

Magsaysay Corpus worked for United Media for six years, moving up from her starting position as a sales executive to licensing director in Asia Pacific. She got to meet her childhood hero Schulz several times in the course of her years there.

“My only regret is that I was not able to tell him how much happiness he gave me through Snoopy and thank him for it,” she says.

Next, Magsaysay Corpus moved to MGM International where she served as vice president of international licensing and merchandise, then decided to return to the Philippines where she launched her own licensing agency, Click! Licensing Asia.

Click! Licensing is now one of the most respected licensing agencies in Asia and boasts a client roster that includes brands such as “Sesame

Street,” Pokémon, Tony Hawk and more.

“Challenges are always part and parcel of any business. Click! Licensing has to make four customers happy: the licensor, whom we represent; the licensees, who use the brands; the retailers, who sell the products; and last but not least, the consumer, who is the ultimate customer. As a licensing agent, we have to ensure that we are able to satisfy and manage their expectations,” she explains.

Managing the intricacies of the licensing industry is a skill she has picked up from several people throughout her career.

“I have three people in mind whom I consider mentors. One is Mike Georgeopolis, who was senior vice president at United Media, and our licensing agent for Europe at that time, Giovanni Trimboli. They were both entrepreneurial and practical, with strong business acumen and acted with a sense of urgency. They knew licensing inside and out. I learned from them to be direct, brief and thorough,” she says. “The other was Virginia Ramos, who had the Sanrio franchise in the Philippines. From her I learned that you can accomplish anything if you set your heart and mind on it.”

Magsaysay Corpus’ career is a testament to that advice.

And so her response, when asked which brand Click! Licensing would love to work with, will come as no surprise: “That would be Peanuts of course!”



MARILU MAGSAYSAY CORPUS
chairwoman and chief executive officer, Click! Licensing Asia

123

SESAME STREET

If a girl can dream it, she can achieve it!

CONGRATS!



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2017 Sesame
Workshop

Carla Peyton

Over her time in the licensing business, Carla Peyton has worked for some of the biggest brands in the world such as Dr Pepper Snapple Group, Equity Management (which represents brands such as GM and Hefty) and now BBC Worldwide Americas.

Fittingly, Peyton got her start in brand licensing working on arguably the biggest celebrity brand of all time—Elvis Presley.

“The position [at Elvis Presley Enterprises] gave me incredible exposure to a multitude of areas across merchandising, licensing, e-commerce, music publishing and creative development,” she recalls.

Times continue to be exciting for Peyton at BBC Worldwide, with a major new development for “Doctor Who.”

“With the announcement of the first female Doctor, we feel new doors have opened, and the new opportunities for innovation are limitless.”

In fact, innovation has been key for Peyton throughout her career, a trait she picked up from another pioneering female executive.

“Lois Sloane from Turner Home Entertainment was my mentor,” Peyton says. “Lois was a trail blazer, forging paths with incredible grace, and she mentored me through her journeys. Through Lois’ tutelage, I learned to face any challenge head on. She further advised me to ‘get the background,’ and know everything available about the people on the other side of the table, a lesson I take to every meeting and share with everyone on my team.”

Transparency and support is also a focus for Peyton’s leadership.

“The best leadership advice I have ever received is that people are your

best asset,” she says. “Respect all opinions, and match the passion with the opportunity.”

When looking at the current challenges in the business, Peyton believes collaboration and synergy are crucial to any brand’s success.

“We are in a world where content is king, and identifiable points of difference are crucial in order to break through an overly crowded marketplace,” she says. “Brand building and franchise management encompass so much more than product licensing, because the world has changed, and without all the businesses contributing to one goal, it is very difficult to launch a product and break through all the noise. We have found that when all the businesses are aligned, whether per territory or globally, we are able to give not only our audience, but our partners, a 360-degree campaign that touches each part of the brand.”

That kind of big picture outlook has been key to Peyton’s success over the years, as are the people she has worked with.

“I have been incredibly fortunate to have worked with and for immeasurably talented, strategic and creative people,” she says. “Working alongside these visionaries has allowed me to grow in numerous areas. I am very grateful to so many.”



CARLA PEYTON
senior vice president, licensed
consumer products, BBC
Worldwide Americas

Kerry Phelan

Kerry Phelan, who currently serves as president of global franchise management at Lionsgate, wasn’t always known for her work in the entertainment industry. She actually spent the first half of her career in the toy industry, working in numerous brand marketing positions at LEGO Systems before starting her first “true” licensing position in 2000 at Lucasfilm.

“Receiving a call from Howard Roffman asking if I would consider joining the Lucasfilm team to work on the *Star Wars* brand shifted my career from toy product marketing to entertainment brand licensing—and presented me with a wonderful challenge, while still working on two brands I loved. The fundamentals I learned during my time [with LEGO] were invaluable, and I went on to apply those brand management skills to the licensing business in the entertainment industry.”

During her time with Lucasfilm, Phelan oversaw the domestic licensing business for *Star Wars* and later expanded her role to oversee the company’s worldwide licensing program.

In 2005, she joined Pixar to start the studio’s consumer products division, prior to its acquisition by Disney. Phelan worked on both *Cars* and *Ratatouille* before stepping down to head up DreamWorks Animation’s worldwide consumer products and retail development division.

At DreamWorks, Phelan worked on the iconic *Shrek* and *Madagascar* franchises, as well as launched new franchises including *Kung Fu Panda* and *How to Train Your Dragon*. During her tenure, she also developed a

retail-tainment program at Walmart for the first *How to Train Your Dragon* film.

“In 2014, I met Tim Palen, chief brand officer at Lionsgate, and was so inspired by his vision for the future of the studio’s brand and franchise initiatives and his plans for building a franchise management division that I immediately wanted to be part of it,” says Phelan. “In my current role, our team looks to find ways to extend our content into new business areas that will drive incremental value for the studio and deepen consumer engagement with our brands.”

After three years with the entertainment studio, Phelan has created a variety of programs spanning brand partnerships, consumer products, live shows and location-based entertainment for brands including *The Hunger Games*, *La La Land*, *Wonder*, *John Wick*, “Mad Men,” “Orange is the New Black,” Starz’s “Ash vs. Evil Dead” and more.

Although Phelan has showcased her expertise on a raft of entertainment brands, the industry veteran isn’t planning to go anywhere in the near future.

“There is no ‘next’ beyond Lionsgate,” says Phelan. “I love what I’m doing and who I’m doing it with. When you’re fortunate enough to find that combination, you don’t change it.”



KERRY PHELAN
president, global franchise
management, Lionsgate

PANADERÍA

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THANKS TO HER *passion*
TODAY SHE IS ONE OF THE 18
MOST INFLUENTIAL WOMAN
IN THE LICENSING WORLD



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Maca Rotter

Maca Rotter brings 23 years of experience to the world of licensing, most recently founding La Panadería Licensing & Marketing, a firm based in Mexico.

Rotter spent a majority of her career at Televisa, managing the consumer products business for more than 17 years. While serving as managing director, Rotter grew the market share for major worldwide properties in Televisa's portfolio such as "El Chavo," helmed the launch of the first-ever licensing program for the teen live-action series "Rebelde & RBD" and produced the series "El Chapulin," a breakthrough in her career. Rotter also managed the kids strategy for Televisa, its productions and co-productions, as well as programming for the "only existing slot for preschool in the country," she says.

"Being a very small business in a very big corporation always presented a challenge to succeed, to demonstrate the importance and relevance of the strategies at retail for each brand and that they created a beneficial marketing cycle," says Rotter of her work at Televisa. "But the growth of the division's income every year and its outstanding results managed to create the confidence in the business, the commitment from the team and drive the passion to achieve the goals budgeted for the business year-over-year—it did the magic."

In 2011, Rotter was foundational in creating Univision Consumer Products in the U.S., after Televisa acquired a major stake in the company. There, Rotter expanded representation for Univision beyond North America, bringing the business into Latin America and Europe, where it achieved double-digit growth year-on-year, she says.

Rotter also founded and remains active in Promarca, Mexico's

licensing association, and was chair of LIMA's board of directors in 2015.

Rotter is also an author, and published the first-ever Spanish-language handbook on licensing and merchandising in 2014. A second edition was published this year.

Now, Rotter is the president and chief executive officer of La Panadería, which "bakes brands" and represents properties from Televisa, Entertainment One, Moose Toys, Sesame Workshop and Animaccord, among others.

"Now I own the dream with those who dream it," says Rotter, as she "walks the walk" with her "partners in crime" Jessica Juseppe and Alejandra Mier. Rotter takes pride in the fact that La Panadería is comprised of 70 percent women, but each of her employees "share the same commitment to make La Panadería a meaningful workplace every day."

"Now, after founding La Panadería and keeping the support from Televisa and the partners of the brands we represent, the goal is to become a leader in the market, to deliver the results we have promised and to give back the confidence of everyone that trusted in our capabilities," says Rotter.

For Rotter, the accolades keep coming. She has been named one of the Top 100 Mexican Women in Business by *Expansion* eight times, and in 2015 was named one of "14 Women to Watch: Mexico" by *Ad Age*.



MACA ROTTER
president and chief executive officer, La Panadería Licensing and Marketing

Congratulations Nancy
An honour well earned and well deserved

The Man with the Mustache

Miki Yamamoto

At the turn of the century, Miki Yamamoto joined IMG to develop its sports licensing portfolio in Asia. Seventeen years later, Yamamoto has proven to be a powerhouse player, and now serves as the company's senior vice president of its Asian licensing business, managing a variety of IPs spanning sports, corporate trademarks, fashion, lifestyle and entertainment.

"Since joining IMG, I've played an integral role in expanding the company's traditional sports clients in Asia, such as Major League Baseball, Arnold Palmer and The Open," says Yamamoto. "Furthermore, I have diversified and expanded IMG's Asian licensing business to cover entertainment and lifestyle clients including Twentieth Century Fox, Media Rights Capital, MGM, 'Sesame Street' and American Greetings."

Yamamoto's credentials span far beyond IMG, however. She began her career in 1989 working with the Peanuts brand at United Media. There, she developed a variety of unique licensing programs in Japan, including Snoopy Town and the Snoopy Anniversary Exhibition. After United Media, Yamamoto moved onto Calvin Klein, where she managed more than 200 retail locations in Japan, as well as high-end licensing programs in categories such as home and fragrances.

Yamamoto has also developed a number of creative, experiential endeavors, many of which have shaped her career.

"I've always been creative in business development and, in particular, in successfully integrating Western properties into Asian culture and

vice-versa," says Yamamoto. "I developed an MLB café concept in Japan to provide Asia-based audiences the opportunity to experience the game without traveling to the U.S. I also helped create café concepts for various U.S. entertainment properties such as 'The Simpsons' (30 cafés in China) and 'Sesame Street' (two in Japan), in addition to connecting them with high-profile fashion brands to launch lifestyle apparel collections.

Another highlight: Yamamoto developed retail partnerships with top department stores including Lane Crawford to set up pop-up stores for *Playboy*.

While her accomplishments have been remarkable thus far, Yamamoto, like everyone in business, faces new challenges and has had to look to new ways to grow the brands and properties she represents.

"The retail situation in Asia (and globally) is rapidly changing and consumers are increasingly savvy, demonstrating a deep understanding of the value of their products," says Yamamoto. "Simply placing logos or characters on products no longer attracts customers. This means we have to be more creative in how we present our brands to consumers and retailers in order to offer something special and unique."



MIKI YAMAMOTO
*senior vice president, Asia, IMG
Licensing*

Rosa Zeegers

Marketing, and by extension licensing, was not the path Rosa Zeegers set out on as a recent college graduate. In fact, Zeegers saw herself as a teacher.

Armed with an M.A. in medieval German literature, it was a chance encounter with a business economics professor that set Zeegers on a new course, and one that ultimately took her around the world, building out an impressive resume, rife with achievements.

"I discovered that I loved marketing—the combination of strategic thinking, creative execution and rolling up your sleeves and making money out of it is what I still love to do today," says Zeegers.

Zeegers took her first professional role at Unilever, where she spent eight years in its marketing department, learning the ins and outs of the business across the company's stalwart brands.

But it can be argued that Zeegers rose to prominence and "got her spot at that grown up table" at airline KLM, which was undergoing a massive shift in its business model as a result of industry-wide deregulation. In Zeegers, KLM found whitespace in the marketplace and, under her direction, developed a brand positioning for the airline, identifying new target consumers that would ultimately revolutionize the way business people travel still today.

"In those days, life was pretty simple," says Zeegers. "If you traveled for business and were from a large corporation, you traveled in first or business class. If you traveled for leisure, you traveled in economy. But there was this growing segment of young entrepreneurs and companies that were cost-conscious and that did not want to pay the enormous amount of money for a first or business class ticket, but they were willing to pay for a few extra key things, which is how we launched KLM Comfort, or economy plus. KLM

was the first to do so in the industry, and now it is a widely adopted across all airlines."

The moment was pivotal in Zeegers' career, and opened up even more doors and opportunity, not only in Europe but around the world, as well.

Following KLM, Zeegers shifted over to Mattel, where ultimately she found herself as vice president of licensing for the European girls' market, and where Zeegers got her crash course in licensing, falling in love with the business mode along the way. Fifteen years later, Zeegers went on to head global licensing for Mattel brands. During Zeegers' tenure, Mattel launched new flagship brands like Monster High; opened up new markets, territories and categories; and oversaw Barbie's 50th anniversary, which was transformative in the brand's positioning.

Now, Zeegers finds herself in yet another influential role in yet another new business category.

"Frankly, I think I am in a pivotal moment now," she says, in regards to her current role as executive vice president, consumer products and experiences, National Geographic Partners. "The National Geographic brand has been unleashed from its non-profit context, which allows us to go out into the market proactively with this brand that is iconic, big, with a wide reach and awareness, that is, on top of all of that, on an extremely relevant mission. It is ready for growth, and we are able to do so. The brand has the power to change the world."



ROSA ZEEGERS
*executive vice president,
consumer products and
experiences, National
Geographic Partners*



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In Memoriam: Jennifer Richmond



JENNIFER RICHMOND

Jennifer Richmond, managing director of the Richmond Management Group and a long-time Jakks Pacific executive, passed away Sept. 12, after a discreet battle with cancer. She was 49.

Richmond was a long-time member of the licensing community, beginning her career at Tyco Toys in 1993. Over her career, she held several senior brand manager positions with Empire of Carolina and Equity Toys, before joining Jakks Pacific as director of marketing and licensing in 1999. During her tenure, she was promoted to serve as the company's vice president of marketing and licensing before taking on the role of senior vice president of licensing and media.

Most recently, Richmond served as the managing director at Richmond Management Group. While with Richmond Management Group, she assisted in brand acquisitions, brand development, deal and contract negotiations and long-term management of licensed products and programs.

Janice Ross, head of global licensing at American Greetings Entertainment, was a long-time friend of Richmond and stated:

"Jennifer lived her life boldly and authentically. She created meaningful and long-lasting relationships with so many people, both personally and professionally. Her friends were touched by her giving nature, her genuine sense of caring and her eternal positive outlook. Her most cherished relationships were with her amazing husband, Andy; her extraordinary daughter, Bianca, who was truly the light of her life; and their family of animals. To have known Jennifer is to have loved Jennifer."

She is survived by her husband, Andy, and her daughter, Bianca.

Game Changers

License Global is proud to honor more influential women who are actively making a mark on the business of brand licensing, both in their current role and those yet to come. These women were nominated by *License Global's* active and engaged readership and represent only a fraction of the many women that make the licensing industry great and push boundaries every day.

NAME	TITLE	COMPANY
Liza Abrams	senior vice president, global licensing and marketing	Sakar International
Naz Amarchi-Cuevas	head of global licensing	SYBO Games
Maria Ancieta-Risher	vice president, consumer products, Latin America	Universal Brand Development
Dalia Benbassat	vice president, relations and acquisitions	Tycoon Enterprises
Jennifer Bennett	senior director, consumer products, Europe	Mattel
Jessica Blue	senior vice president, global licensing group	UBM
Susan Bolsover	licensing and consumer products director	Penguin Random House U.K.
Bryony Bouyer	senior vice president, category management, marketing and creative, licensing	Hasbro
Juli Boylan	global head of licensing	MGA Entertainment
Andrea Brent	senior vice president, licensing and franchise management	FremantleMedia North America
Sarah Buzby	vice president, consumer products, North, Central and South America	Ubisoft
Dawn Ciccone	vice president, brand licensing	PBS
Kate Karcher Clark	founder	YOTTOY
Carolyn D'Angelo	president, home division	Sequential Brands Group
Gaye Dean	marketing director	Target
Terri DiPaolo	head of licensing, sponsorships and endorsements	TKO – The Kirby Organization
Cynthia Hall Domine	president and owner	Synchronicity
Kate Dwyer	group director, worldwide licensing	The Coca-Cola Company
Claire Gilchrist	vice president, consumer products, Asia-Pacific	Hasbro
Maria Giovanna Gurrieri	managing director, Southern Europe	CPLG
Joan Grasso	senior vice president, licensing, North America	Entertainment One
Veronica Hart	senior vice president	CBS Consumer Products
Trudi Hayward	senior vice president and head of global merchandise	ITV Studios Global Entertainment
Danielle Jones	brand business director	Jazwares
Heather Kamins	senior vice president, business and legal affairs	CAA-GBG Global Brand Management
Tamra Knepper	senior vice president	Branded Entertainment Network/Greenlight
Alix Kram	vice president	Warner Music Group
Andre Lake Mayer	president, global brand strategy and consumer products	Zag Animation Studios
Carol Leblanc	senior vice president, consumer and education products	Smithsonian Institution

NAME	TITLE	COMPANY
Cindy Levitt	senior vice president, merchandise and marketing	Hot Topic
Ashley Mady	president	Brandberry
Ashley Maily	vice president, head of licensing and partnerships	Activision
Menal McGrath	director, licensing and acquisitions	Moose Toys
Claudia Mazzucco	chief executive officer	Atlantya Entertainment
Lynne Metzinger	director, licensing, softlines, Disney, media, classics and entertainment, Disney Consumer Products and Interactive Media	Disney Consumer Products
Cynthia Modders	owner	Firefly Brand Management
Pooneh Mohajer	chief executive officer and co-founder	tokidoki
Erin Morris	senior vice president, retail business development and e-commerce	Fox Consumer Products
Marina Nirishkin	director, licensing	TF1 Entertainment
Roz Nowicki	executive vice president	Peanuts Worldwide (a division of DHX Media)
Carole Postal	president	Spotlight Licensing and Brand Management
Maura Reagan	executive vice president	International Licensing Industry Merchandisers' Association (LIMA)
Debra Restler	vice president, business development and marketing	Beanstalk
Leah Robert	chief communications and strategic development officer	Camuto Group
Janice Ross	head of global licensing	American Greetings Entertainment
Kristin Sangha	president	Innovative Designs
Tara Sinclair	licensing specialist	Netflix
Lauren Sizeland	director, business development and licensing	V&A
Jamie Stevens	executive vice president, worldwide consumer products and licensing	Sony Pictures
Lisa Streff	executive vice president, global licensing	Epic Rights
Tammy Talerico-Payne	director of licensing	Church & Dwight Co.
Anoulay Tsai	director, licensing	SEGA America
Jill Tully	vice president, brand licensing	A+E Networks
Rachel Wakley	general manager, U.K. and Ireland	Warner Bros. Consumer Products
Karyn Weiss	senior vice president, business development and licensing	Accessory Innovations
Jill Wilfert	vice president, inbound licensing and entertainment	LEGO Systems
Pam Westman	head	Nelvana Enterprises
Laura Zebersky	chief creative officer and executive vice president	Jazwares

 These women are also nominees for WIT–Women in Toys, Licensing & Entertainment's Wonder Women Awards, which honors and celebrates outstanding business leaders, senior managers and entrepreneurs for their achievements and significant contributions to the toy, licensing and entertainment industries. Award winners will be announced at the 14th Annual Wonder Women Awards Gala on Sunday, Feb. 19, 2018, in New York City. For more information and to purchase tickets, please visit www.womenintoy.com.

Top Women-Led Brand Licensing Agencies

To further reinforce the power of women in the business of brand licensing and consumer products, here are just some of the leading agencies that are helmed by female leadership.

Asia

Philippines

Click! Licensing Asia

www.clicklicensingasia.com
Marilu Corpus, chief executive officer
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T: +63 (2) 9141031 ext. 32

Australia

Haven

www.havenglobal.com
Yvonne King, director
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T: +61 2 9357 9888

WP Brands International

www.wpbrands.com.au
Lim Mi-Kyoung, managing director
T: +61 3 9274 2900

Europe

Denmark

Nordic Licensing Company

www.nordiclicensing.com
Kristen Gyde, owner
E: kg@nordiclicensing.com
T: +45 3378 6601

France

Sagoo

www.sagoo.fr
Véronique Pichon, president
E: contact@sagoo.fr
T: +33 (0) 1 40 54 96 42

TF1 Entertainment

www.tf1.fr
Marina Nirishkin,
director of licensing

Germany

Active Merchandising

www.activemerchandising.de
Anita Van Esch

Team! Licensing

www.teamlicensing.de
Katarina Dietrich, co-founder
E: info@teamlicensing.de
T: +49 89 24 23 124 0

The Brand Residence

www.thebrandresidence.de

Marlies Rasl, managing director
T: +49 171 639 03 32

Italy

Licensing Italia

www.licensingitalia.it
Roberta Nebbia,
managing director
E: roberta.nebbia@licensingitalia.it
T: + 39 02 89690434

The Netherlands

J&M Brands

www.jmbrands.nl
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COUNTERFEITING: A GAME OF 'WHACK MOLE'

Protecting a core brand is of the utmost importance—after all, it is the livelihood of any licensor. But how do companies tackle an issue that seems to grow larger and larger as the world becomes increasingly interconnected?

by AMANDA CIOLETTI

In 2015, U.S. Customs and Border Protection seized more than \$1.3 billion in intellectual property rights-infringing goods, a 10 percent increase over 2014. That year, the U.S. made 538 arrests that resulted in 339 indictments and 357 convictions.

According to U.S. Homeland Security, each year, more than 11 million shipping containers arrive

in U.S. seaports, with another 10 million goods containers arriving by truck, 3 million by rail and an additional quarter billion more cargo, postal and express consignment packages arriving by air.

Of these shipments, U.S. Customs and Border Protection seized 550 shipments containing labels or tags bearing counterfeit trademarks intended to

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create non-genuine products, which, says CBP, would be worth an estimated additional \$33.3 million.

In a report commissioned by the International Trademark Association and the International Chamber of Commerce, it is projected that the global economic value of counterfeiting and piracy could reach \$2.3 trillion by 2022, with the global value of the counterfeit market at \$1.7 trillion as of 2015. (Source: VOA.)

With this in mind, it is no surprise that licensors are increasingly taking a proactive stance in combatting the problem of counterfeiting.

IT IS PROJECTED THAT THE GLOBAL ECONOMIC VALUE OF COUNTERFEITING AND PIRACY COULD REACH \$2.3 TRILLION BY 2022, WITH THE GLOBAL VALUE OF THE COUNTERFEIT MARKET AT \$1.7 TRILLION AS OF 2015.

“One of the biggest competitors to every successful licensed brand is typically not another licensed brand, but a counterfeiter,” says Bill Patterson, vice president, corporate marketing, OpSec Security, a security solutions firm that fights counterfeits for brands, transaction cards and government documents and currency. “A brand owner really makes nothing... If someone is buying a counterfeit product, there is still a demand for that intellectual property, they are just not buying the product from a legitimate manufacturer.”

The risks to licensors is certainly monetary, and loss of revenue is of course a concern, however the issue is complex, with multiple factors and motivations to consider. And just as the matter is complex, the global network of counterfeiters is equally as mind boggling, with many describing the grey market industry as one so large and so vast, with an ever-changing playing field.

“A lot of our clients have referred to the process of tackling counterfeiters as whack-a-mole,” says Jamie Goldberg, senior director, business development, CounterFind, a turnkey technology that uses image recognition to recognize, report and remove all ads marketing counterfeit merchandise on social commerce.

“When one counterfeit seller pops up, it gets shut down, and then another pops up. They just can’t control it.”

“The question we get every day from brand owners is, ‘This is such a massive problem. How do I tackle this?’ There is somewhat of a paralysis by analysis when they realize how big a problem it is to have to deal with when they are in a situation that forces them to deal with it. Paralysis by analysis has the ability to kill a brand,” says Patterson.

Categories of business most vulnerable to non-genuine merchandise vary from vertical to vertical, but across the board many agree that apparel has the lowest barrier to entry for those intent on manufacturing and selling counterfeit products.

“Apparel is probably the top category for counterfeits,” says Patterson. “Apparel is somewhat easy to manufacture on a small or large scale. Apparel is also very easy and light to ship across borders.”

Additionally, with the advent and increasing employment of print on-demand services, counterfeiters are finding it easier and easier to set up a small-time operation with big-time impact.

“The future is e-commerce. We have seen such a huge increase of counterfeiting online because counterfeiters can hide behind their computer,” says Goldberg. “What they do is pull any transparent logo from the Internet and, with print-on-demand, they can go ahead and print any brand or trademark. Then, as soon as someone clicks ‘buy’ on Facebook or Instagram, they take these logos and print it on a t-shirt. Selling online has become a huge problem because these people are not held accountable.”

Rikesh Desai, director, licensing and gaming, BBC Worldwide, agrees, and says social media and community space merchants are more and more where counterfeits are popping up, using platforms like Twitter, Facebook and Pinterest to promote pirate goods in real-time via hashtags during fan’s active periods (such as a new airing of the TV series “Doctor Who,” for example). Desai says that BBC is finding the problem in both a business-to-business and business-to-consumer capacity, as well.

Regionally, all markets around the globe are vulnerable, with activity appearing more predominantly in the U.S., Europe and Asia.

“Western Europe, the U.S. and more so now, China, are massive markets for counterfeit merchandise from a geographical standpoint, and that is because Western Europe, the U.S. and the growing middle class of China are areas of high consumer demand coupled with middle class workers with discretionary income,” says Patterson. “And that is really important to consider because when we talk about licensing, we talk about those with discretionary income who buy items that they don’t necessarily need, but

they want. With that growing middle class, these markets are becoming more of a market for counterfeit goods.”

What is being counterfeited and what brands are most susceptible to piracy, however, ebbs and flows with individual market trends. One day it may be superhero merchandise, while the next it is preschool properties. A consistently vulnerable area, however, is sports brands.

“What people want to buy follows the trends in the media,” says Patterson. “What doesn’t change is sports. You’re always going to be a Manchester U fan, a major league baseball fan, an NBA fan. Sports is very much a part of the counterfeiting world, and because so much of it appears on apparel, it has a lower barrier of entry for counterfeiters. These are established brands that have been around for decades, so there is a guarantee that it will be popular. Sports brands do not have to worry about ebbs and flows of trends.”

Desai agrees that the long-term popularity of certain BBC brands, such as the 54-year-old “Doctor Who” franchise does make it a more likely target for counterfeiters. But the deep fandom of the brand and how that is interpreted through merchandise such as small-scale costumes and goods is something that needs to be seriously considered as well.

“A major risk for IP or brand owners is how to balance the mass producers of counterfeit product versus the niche fan that is creating homespun product,” says Desai. “You want to ensure that you do not dampen those fans and mute them—they are the heart of our brands, but we do need to combat those that are out there looking to commercialize or exploit our brands.”

BBC tackles that particularly thorny situation on a case-by-case basis, evaluating each seller individually and establishing a set of guidelines that allows the company to distinguish between those that are truly fans and those intent on profiteering on unlicensed product.

Another major complication and risk factor for illegal merchandise is quality, and the markets that non-tested product is intended for use within, such as children’s products.

“The big risk for BBC is for a consumer to buy product that is of poor quality,” says Desai. “The area of kids’ products is one that we have really clamped down on. We are starting to see some of our brands from the children’s space gain traction in certain regions and have pockets of counterfeit product pop up, essentially ripping off official product that we have from tested licensees that hasn’t been examined for materials, whether or not it complies with safety regulations or any other elements that would typically be vetted, checked and triple checked from a quality perspective by our best-in-class partners.”

So, then, what does a licensor do to battle this problem?

“When it comes to counterfeit product, we’re very early in tackling that,” says Desai. “Historically, it has been a very manual exercise within our organization that has been handled through legal or is flagged by our licensing partners who have come across misuse of our IP or brands, and then we manage that on a case-by-case basis. It has gotten to the point, however, that the problem is too big for our internal team and we need to seek out a more efficient solution to tackle the growth in the space—it’s a problem for a number of IP owners globally.”

BBC Worldwide has engaged Incopro, an online protection company, to help the licensor combat the piracy issue. Incopro scans online marketplaces, websites and social media for counterfeit goods.

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The exercise, and more importantly the investment, is essential to licensors such as BBC—its brand integrity is on the line and constantly being threatened.

Companies such as Incopro, OpSec and CounterFind work hand-in-hand with the licensor to cut off the counterfeiter and strike down the whack-a-mole at the root, first engaging the seller directly through legal channels and then taking more dramatic measures such as shutting down the seller’s communication with its social platform, its payment system or, even in some cases, its web host.

And as daunting as the problem seems, Patterson urges that it is important to begin the process.

“Even if you start small, start somewhere,” he says. “A licensor needs to increase that barrier of entry for a counterfeiter. Make it hard for counterfeiters to move their goods—if they can’t move it quickly and cheaply, they will move on to something else.” ©



Tuning in to Anime

What used to be a niche market is burgeoning into a worldwide sensation, with consumers of every age seeking out merchandise based on their favorite anime brands.

by ERICA GARBER

Entertainment licensing has always been known as the strongest, largest sector in the industry, accounting for 45 percent (\$118.3 billion) of licensed merchandise in 2016, according to the International Licensing Industry Merchandisers' Association's (LIMA) 2017 Global Licensing Industry Survey. The smaller, niche segment of the entertainment sector known as anime, the Japanese storytelling and animation style, has been climbing the ranks throughout the years, and is quickly becoming a pop culture sensation worldwide.

Anime's rapid rise in popularity has prompted companies like Toei Animation, Viz Media and Level-5 abby to step up their game in both North America and Europe, meeting fans' needs with a robust assortment of products and experiences that speak to their relationship with these niche brands.

"Anime is stronger than ever as an international category," says Colin Decker, chief operating officer, Crunchyroll, an online platform for Japanese anime. "Importantly, this is driven by the community around anime

more so than any given hit title. Being an anime fan is a lifestyle, and it is growing at a strong pace internationally as we roll out more and more ways to engage fans online and in person.

"The anime industry tends to defy expectations," continues Decker. "There are fans at every age level with a concentration between 18-34. We find that anime is also remarkably evenly distributed across gender—roughly 55 percent male and 45 percent female."

The vast majority of anime content, both in TV and film form, originates from Japan, so in order to bring this content to Western markets, many companies work directly with global video-on-demand platforms, regional TV networks and other distributors. Popular series like "Death Note," "Naruto" and "One-Punch Man," among others, are currently streaming on Netflix in the U.S.; while other programs like "Dragon Ball Super" and "Tokyo Ghoul," among others, are airing on Turner's Adult Swim in the U.S., developing large fanbases in the process.

"There is a strong resurgence of anime in many countries outside of Asia right now," says Aadil Tayouga,

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licensing and retail manager, EMEA, Viz Media Europe. “It’s definitely growing, with more series on free TV and VOD platforms, and more Japanese films getting top prizes in international film festivals.”

Looking toward the future, Tayouga says, “VOD should be where anime will grow the most—on platforms like ADN (our own VOD platform we operate with Media Participants), Crunchyroll, Netflix and possibly Amazon. VR should also be an interesting new platform.”

In fact, anime-specific streaming services like Crunchyroll view traditional streaming services with anime content as helpful to the industry as a whole, instead of competitive.

“We view the mass market streaming services as complementary,” says Decker. “If someone discovers anime on one of those services and wants to go deeper, we know they will do it on the only service with the best content, a huge library and in a community of like-minded folks.”

As this fanbase continues to grow, the demand for merchandise has also increased, and one of the biggest players within the anime sector is Toei Animation, which ranks as the No. 28 largest licensor in the world with \$2.5 billion in retail sales in 2016, according to *License Global’s* annual Top 150 Licensors report. The anime giant is known for series such as “Dragon Ball,” as well as its spin-offs “Dragon Ball Z” and “Dragon Ball Super,” “One Piece,” “Sailor Moon” and “Saint Seiya.”

Toei began introducing its properties to new markets

in the late ‘90s and early 2000s. Today, the company boasts an expansive, worldwide licensing program that covers multiple categories. Recent deals for the company include Undiz for a line of “One Piece” underwear for both boys and men; Dolci Preziosi for “Dragon Ball Z” and “Dragon Ball Super” confectioneries; Boston America for “Dragon Ball Z” candy; Bioworld, Great Eastern and JCorp for “Dragon Ball Z” and “Dragon Ball Super” apparel; Everything Legwear for socks based on the “Dragon Ball” and “Sailor Moon” franchises; Funko for figurines; Hachette for 2018 diaries inspired by “Saint Seiya”; Teknofun for “Dragon Ball Z” and “Dragon Ball Super” electronics; and La Fee Sauvage for a “Sailor Moon” symphonic concert, among many others.

Toei Animation has also signed Cinedigm as its DVD partner for the classic “Digimon” series. Shout Factory is on board for *Digimon Adventure Tri* DVDs, and three more movies are slated to hit U.S. theaters in 2018.

In the coming year, Toei will continue to focus efforts on growing its “Dragon Ball” and “Sailor Moon” franchises worldwide, as well as its “Saint Seiya” franchise across Latin America, Europe and China. Furthermore, the company has experienced incredible growth in the gaming category, including for both mobile and video games, and will release “Dragon Ball Fighter Z” this January.

Viz Media is also making waves in the industry. The company’s North American division broke into *License Global’s* Top 150 Licensors ranking last year, coming in



at No. 150 with \$60 million in licensed retail sales from properties like “One-Punch Man” and “Naruto Shippuden: Ultimate Ninja Storm.” Viz Media Europe also licensed Level-5 abby’s “Yo-Kai Watch” in Europe, Russia and Africa.

In the past year, Viz has seen positive results from “Yo-Kai Watch” among kids and from “Death Note” among teens and adults. For “Yo-Kai Watch” specifically, Viz has secured 130 licensees across Europe spanning toys, publishing, FMCG, promotions and apparel.

Looking ahead, Viz Media Europe is set to focus on the retail development and brand management of season three of “Yo-Kai Watch,” which includes a new toy line from master toy partner Hasbro, a new video game from Nintendo and a robust retail activation plan.

Another company benefitting from the recent popularity of anime is Level-5 abby, which is known for cross-category brands like “Professor Layton’s Mystery Journey,” “Inazuma Eleven” and, as previously mentioned, “Yo-Kai Watch.” However, unlike other traditional anime brands, Level-5 often builds its brands extensively across multiple platforms including TV, gaming and publishing.

“Anime’s appeal translates across many platforms, in particular TV, gaming and publishing. Anime IP has an instantly recognizable and cohesive look, compelling story arcs and tend to be supported by heavy marketing, particularly in years where new video game platforms launch,” says Sandrine de Raspide, senior vice president, licensing and marketing, Level-5 abby. “Our challenge is to grow anime content beyond its core fanbase,



into wider audiences and products, and migration will only happen by adjusting our creative and marketing to fit the environment. There’s not lack of quality assets and content from Level-5 abby, surging from the game, manga and animation, but we need to adapt or create wholly new assets for consumer products

while always staying true to our DNA.”

Heading into 2018, Level-5 is gearing up to launch three properties—two new installments from the classic franchises “Inazuma Eleven” (“Inazuma Eleven Ares”) and “Professor Layton” (“Layton’s Mystery Journey: Katrielle and the Millionaires’ Conspiracy”), as well as a new series called “The Snack World.”

For “The Snack World,” Level-5 has partnered with Asmodee to distribute branded toys in the U.K. and Eire, France, Benelux and Scandinavia. The range was unveiled at the Deauville Toy Fair in France in November.

“To me, anime represents a unique community of fans across the world, even if it is still considered a bit niche in some territories,” says de Raspide. “[The anime] community has a great influence as a consumer and there are definite parallels to comic book followers a couple of decades ago. Just as U.S. comic books broke into the mainstream, I believe we’re about to see anime and manga reach a much wider audience (probably with some help from gaming), just like American comic book characters and storylines became a staple in mainstream entertainment through movie releases at the turn of the century.” ©



MARKET REPORT:

GERMANY

A look at the cultural, political and economic factors driving consumer behavior and the licensing business in the world's 4th largest brand licensing market.

by KIRSTY BIRKETT-STUBBS

Germany is the largest economy in Europe by a significant margin and the fourth largest in the world, behind only the U.S., China and Japan.

The German reputation for efficiency is well-earned. Its engineering prowess has given rise to some of the biggest brand names in the automotive world including BMW, Audi, Mercedes-Benz, Volkswagen and Porsche. Its financial expertise is cemented by big names like Allianz and Deutsche Bank, and the quality of its domestic products have seen Braun, Siemens and Bosch become worldwide household names.

At the other end of the scale, its demand for cost-efficiency has given rise to the supermarket chains Aldi and Lidl, which are not only two of the most valuable brands domestically, but also have a strong presence internationally, particularly in the U.K. German consumers are perceived as being discerning about quality and savvy about how and where they shop.

As the names above indicate, the Germans favor heritage when it comes to brands. However, the country isn't purely inward-looking. Some of the biggest character brands in the country have been adopted from elsewhere, such as the Swiss-created Heidi and Swedish author Astrid Lindgren's *Pippi Longstocking*. An aging population has also strengthened classic brands even more.

Supported by robust employment levels, strong private consumption, a healthy construction sector and steady exports, Germany is expected to maintain its momentum into 2018.

Market Overview

Germany is the largest national economy in Europe at \$3.3 trillion, according to the World Bank. The country continues to perform strongly with The Federal Statistical Office of Germany, Destatis, reporting that Germany saw GDP growth of 1.9 percent in 2016, its highest levels since 2011. It was also the fastest-growing

economy among the G7 states, just overtaking the U.K.

Destatis also reported 0.6 percent economic growth (GDP) in the second quarter of 2017, twice the pace of the U.K. This positive trend is expected to continue, with the German government raising its GDP growth forecast in October to 2 percent for 2017.

Consumer spending is expected to remain high with GfK forecasting a total purchasing power of €1.8 billion in 2017 (a 2.9 percent increase on 2016). This translates to an average per-capita purchasing power of €22,239.

"Germany in general is in a very comfortable economic situation," confirms Peter Hollo, managing director and external lead consultant for Germany, International Licensing Industry Merchandisers' Association. "Low unemployment and a stable political and social environment are the best possible conditions for German retail to grow and prosper."

Certainly a positive influencing factor is that last year saw the highest number of Germans at work (43.7 million) since 1991. Expanding trade is another key growth factor.

Not surprisingly, Germany's biggest retail chains are also its biggest buyers of licensed merchandise. These include discount chains Lidl and Kaufland, owned by the Schwarz Gruppe, Europe's second-largest retailer by revenue.

Discount supermarket Aldi is another major outlet for licensed properties, alongside the Metro Group, which is home to the wholesale brand Metro Cash and Carry and hypermarket chain Real. On the apparel side, leading global clothing retailers Zara (part of the Inditex Group),



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industry that cannot be overstated. In this kick-off keynote, Family Room CEO George Carey will track these shifts in Gen Z's emotional landscape, exploring how they will impact the where, how and what of youth media consumption, and recommending strategies for kids media players to reflect this new reality and elevate the emotional relevance of their properties and platforms with today's kids and teens.



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ANGELA MERKEL
chancellor, Germany

H&M and Primark continue to dominate, with Dutch fashion chain C&A another notable player in Germany.

As in much of the rest of the world, e-commerce is also becoming a bigger and bigger part of Germany's retail picture. Germany Trade & Invest (GTAD) reports that 84 percent (68 million) of the German population are online regularly, with the country responsible for a quarter of all European B2C e-commerce turnover.

The country did experience a brief period of political uncertainty earlier this year, with the unpopularity of Chancellor Angela Merkel's open arms policy on refugees making for a tight race in September.

In the end, Merkel was re-elected to a fourth term as Germany's chancellor after the center-right party Christian Democrats won 33 percent of the vote. This number is down sharply from the 2013 elections though, where the CDU/CSU party took in 41 percent of the vote, leaving Merkel with a slightly diminished stronghold in the Bundestag.

And Germany was certainly not immune to the wave of populism sweeping other nations. The far-right, anti-immigration party AfD won a historic 13.5 percent of the vote, thus becoming the first overtly nationalist party to sit in the Bundestag in 60 years. The triumph of AfD marks a shift in German politics that will likely produce a very different tone and dynamic inside the Bundestag.

Following the election, Merkel expressed disappointment in the overall results, acknowledging the "extraordinary challenge" of the 2015 migrant crisis and the impact it had on the country. She also pledged to listen to AfD voters and win back those she could with "good politics."

Licensing in Germany

"The importance of brand licensing and licensing in general is significantly growing in Germany," says Hollo. "There is strong demand by the consumer to buy branded/licensed products. German retail has done a lot to drive this success."

This much is apparent from LIMA's 2017 Global Licensing Industry Survey, which puts Germany as the fourth largest market worldwide for licensed merchandise, surpassed only by the U.S., U.K. and Japan, and accounting for 4 percent of the total worldwide. The country notched up to \$10.6 billion in licensed merchandise sales in 2016, up almost 4 percent from \$10.2 billion in 2015. Royalties from licensed merchandise also grew in 2016 to \$595.5 million.

Overall, Germany was responsible for 20 percent of Western Europe's \$52.4 billion of total income from licensed merchandise sales in 2016.

Character and Entertainment

Character and entertainment licensing continued to be the biggest driver of licensing revenue in Germany in 2016, accounting for 58 percent of the country's licensed merchandise sales and totaling \$6.2 billion. This was up slightly on 2015's figure of \$6 billion.

A massive 90 percent of all licensing in the toys category in Germany is for characters, which shows the importance of having strong, recognizable brands in this sector. In this respect, Germany is not immune to the traditional merchandising power of big-name movie and TV characters. Characters like the Minions spawn huge merchandise ranges with both retailers and licensors having adjusted to the short promotional windows around new releases.

"When it comes to character entertainment, toys are still the largest driver," agrees Gerd Russwurm, head of licensing, m4e. "It's difficult though. Around the world, brands like Disney occupy a high percentage of shelf space, and smaller brands have to fight for what remains. The key is retail management. In the past the IP owner would just sell the license and hope the licensee did a good job. Those days are over. Brand owners have to adapt and convince retailers up front that they need shelf space. Now the IP holder does a deal directly with the retailer and then the retailer decides on who will supply the products under the license."

Corporate Brands

Outside of characters and entertainment, corporate licensing is the second biggest source of licensed merchandise sales in Germany, reaching \$1.5 billion in 2016 and bucking the overall trend of decreasing sales for corporate brands.

Some of Germany's best known corporate brands are from the automotive world. Despite its recent PR and financial troubles, Volkswagen is still one of the largest licensors in the world (No. 93), according to *License Global's* annual Top 150 Global Licensors report, with an estimated \$280 million in licensed retail sales in 2016. The company's Beetle and VW Camper Van models are particularly well-recognized and have lent themselves well to licensing into a host of categories from apparel to outdoor products.

Another top licensor, electronics brand Telefunken (No. 74) achieved sales of \$471 million through its global license partner alliance, which sees more than 35

licensees using the brand name throughout the world. The company's licensing partnership with television manufacturer Vestal Group in particular has given the brand a stronghold in the TV market in Germany.



Other Areas of Opportunity

LIMA's Hollo notes that, although the focus has very much been on character licensing in the past, it's not the only area of opportunity for brand licensing in Germany.

"There's no question that entertainment licensing has done an outstanding job. But lifestyle, sports and fashion brands are quite busy, as well. Without forgetting the great achievements of entertainment licensing, it's time to broaden our view and acknowledge the great stories of success that these brands have built, as much as consumers do by buying their products."

Indeed, LIMA's latest figures show that fashion licensing was worth \$1.1 billion in sales in Germany in 2016, with sports following close behind at \$1.09 billion. Apparel is the biggest overall product category for licensed products at retail in Germany at just under \$2 billion.

When it comes to the players in this segment, athletics companies Adidas and Puma are two domestic brands that have a strong international presence in this sector through licensing. Although perhaps not as highly regarded as Italy or France, Germany is also still renowned in luxury fashion thanks to major designers like Hugo Boss and Karl Lagerfeld.

Germany's love of football is also apparent from the retail sales of DFB-Wirtschaftsdienste, a subsidiary of the German Football Association (DFB). The brand achieved \$560 million in sales in 2016 according to *License Global's* Top 150 Global Licensors report, where it ranked at No. 68.

Classic Characters

While Germany has proven a strong market for all sorts of brands, Katarina Dietrich, chief executive officer, Team! Licensing, says, "classic characters are very well respected in Germany. You find products that are based on 60-year-old characters. These are brands that are not necessarily supported by recent movies or TV series, so you always have to keep the brand fresh with new products. You can do that because you have a target audience that knows and loves the character."

These characters may not necessarily be German in origin, but they must have a long-term presence in the market. m4e's Mia is one domestic character that has had a presence for more than 40 years.

"Classic brands work because customers who had a positive experience with a brand in their childhood remain loyal to it as they get older. There is a multi-generation aspect—if you have a grandmother who grew up with Heidi, she passes that positive experience onto her daughter who passes it on to her own children. This is still in place," says Russwurm. "Customers are often

lost in the new brands coming in and out, and are still looking for these traditional brands and values. If you are in licensing and you get a classic character you can still get a home run. Retailers also find a certain level of safety and comfort in the long-term approach to brand building. New brands can be hyped today and dead tomorrow."

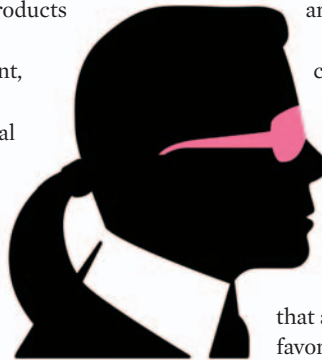
This multi-demographic audience has in recent years enabled licensors in Germany to move into more and more diverse product segments.

"With classic brands you can really explore the categories and go deeper and deeper into the products such as licensed coffee and tea capsules or hangers," says Dietrich.

Wide market appeal also puts established brands in the enviable position of being able to license into all areas of retail from luxury to discount chains.

"The brands are strong enough that you can be in every tier of the market—discount, mass market, mid and high-end. There's a vertical product chain, so with Peanuts for example you can have a fashion cooperation with Gucci, a huge baby program at Lidl and a huge ladies' nightwear program with C&A at the same time," says Dietrich.

Russwurm agrees: "Our objective is that all licensed products reach fans in their favorite shop. Some 'Mia' fans can only afford to spend €10, others can spend €50, so we need to be in different stores. You also have to analyze whether it's a good fit for the brand from a product point-of-view."



Cultural Influence

One cultural element that is still a major influence in the character market in Germany is books. Home-grown brands like the Brothers Grimm and their fairy-tales, and *The Little Witch*, have a strong presence, alongside classic international characters like *The Hungry Caterpillar* and *Heidi*.

"You find a lot of new productions are based on books. Reading is still an accepted pastime in Germany, especially when it comes to classic children's books," says Dietrich.

Russwurm adds: "The book market is still strong in Germany and has a big reach culturally. Although there is a shift to digital devices, we don't see it at the same percentage among children in Germany as in other places. Children are encouraged to like books at a young age. Education-based content is also very successful."

LIMA's global survey reports another big boost for the publishing segment in Germany in 2016 (up 23 percent from 2015 to \$162 million in 2016), and this after almost doubling the previous year from just \$69 million in 2014.

Notably German physical book stores have less to fear from the likes of Amazon than their international counterparts thanks to a law that requires all

booksellers to use one fixed price for each book.

Although classic characters have the most demand, Germany is also creating new licensable characters for the digital age. The Emoji Company launched in 2013, and already has a library of more than 5,000 copyrighted emoji images available for licensing. Some of these icons have become instantly recognizable, particularly for the digitally savvy Millennial generation. They also translate more easily across different territories, adding to their licensing appeal. This explains why The Emoji Company has already signed up more than 300 license partners around the world and has a presence in over 60 different countries.

Aging Population

Germany has one of the most aged populations in the world, second only to Japan in 2016. The country's birth rates remain below the EU average, but fertility rates rose for the first time in 30 years in 2015 to 1.5 children per woman. High levels of migration and intake of refugees in recent years is also helping to create a more positive picture.

Longevity is the biggest driver of Germany's changing population age, and it's a challenge that the rest of the world is facing as well. As life expectancy goes up and people continue to live longer, Germany's population is aging faster than new children are born.

"If you look at how much longer people are living compared to even 20 years ago, there's a dramatic change," says Russwurm. "This is something we have to bear in mind when creating products—a 60-year-old man will need a different interpretation of a brand than a child."

In 2013 *Retail Week* reported that shoppers ages 45 to 64 made up almost half of Germany's retail spending per capita. However, by 2018 this will have dropped to 43 percent, almost neck-and-neck with senior shoppers (65 and over) as the country's population becomes increasingly older.

By comparison retail spend per capita is expected to drop for shoppers ages 25 to 44 to just 8.1 percent. Therefore, brands that appeal to an older audience, whether shopping for themselves or for other family members, look to be in a stronger position.

E-Commerce

According to A.T. Kearney's Global Retail E-Commerce Index 2015, Germany is already Europe's second-largest e-commerce market (behind the U.K.). However, it forecasts the German e-commerce market to have almost three times the current growth potential of that in the U.K.

The Federal Association of E-Commerce and Mail Order in Germany (Bundesverband E-Commerce und Versandhandel) reported that the country's retail e-commerce sales grew by 12.5 percent in 2016 to \$58.34 billion. Meanwhile, The Association

of the German Internet Industry (Verband der deutschen Internetwirtschaft) predicts e-commerce turnover will surpass €100 billion by 2020.

"What is massively influencing German retail is digital disruption. E-commerce is questioning a lot of what retail managers thought was safe and sure," says Hollo.

As is the case in most markets, the shift to online shopping is being driven by Amazon, with domestic e-commerce companies Otto and Zalando also playing a key role. A number of factors are influencing German consumers' uptake of e-commerce. One is the fact that the majority of the population now has reliable Internet access.

Another fact is that Germany's history of catalog shopping at home has helped pave the way, with some seeing online shopping as a natural next step. The market also has some quirks that e-commerce players have had to accommodate to ensure growth.

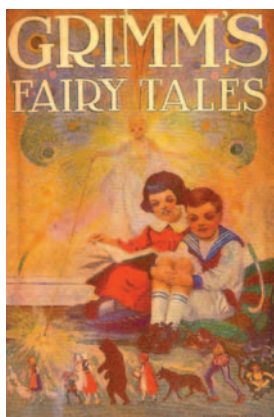
"The German consumer is more demanding than average when it comes to aspects such as website loading times, payment methods, delivery/return options and costs involved. German consumers are perceived to be 'return champions' by companies from abroad," says Nadine Litchfield, consumer markets and e-commerce expert, GTAI.

Unlike other countries, German consumers are somewhat unique in preferring to opt for payment on account as a payment method when shopping online. Despite a wealth of other options, the continued popularity of this method is attributed to security concerns and the returns culture.

However, eMarketer reports that e-commerce sales only made up 7.3 percent of total retail sales in Germany last year and projects this might reach 7.9 percent in 2017. This means that physical retail is still by far the biggest channel for sales of merchandise. Online grocery shopping is one area where growth is slow going with just 28 percent of customers surveyed by Bitkom having shopped online in 2015, the same amount as in 2014. Freshness and quality of products is one barrier to greater uptake.

It's not just traditional e-commerce that the retail sector needs to be thinking about though. Shopping from smartphones is also on the rise in Germany with eMarketer forecasting that sales through this channel will rise almost 23 percent this year to \$23.53 billion. It also expects them to surpass \$32 billion by 2020—more than double mobile sales figures for 2015.

Increased competition in the retail sector may actually be proving itself to be a positive thing for brand licensors, though as Russwurm notes: "With more and more new online stores opening, including brand shops within Amazon, retailers are all competing to get a piece of the cake. They want to attract potential customers with new products, and this presents a lot of opportunities." ©





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