

FEBRUARY 2018 VOLUME 21 NUMBER 1

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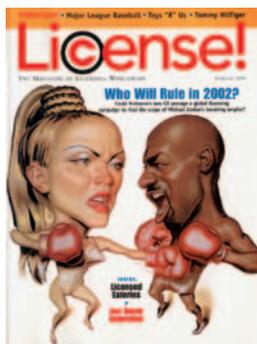
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## 26 LICENSE GLOBAL TURNS THE PAGE ON 20 YEARS

Since its debut in February 1998, *License Global* has not only been an industry leader, but an essential source of news and insight for the licensing industry. Now, 20 years on, the magazine continues to serve as a crucial source for licensors, licensees, manufacturers and retailers looking to make a mark in the industry. Take a look at how *License Global* has helped to shape brand licensing.



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Pam Lifford, president, Warner Bros. Consumer Products

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# HI THERE, GEN Z! NICE TO MEET YOU.

Is it time to turn our focus from Millennials and look toward what's coming next?



by AMANDA CIOLETTI  
content director

Oh, Millennials, the much-maligned generation! Heaped upon this broad demographic are all of the responsibilities for the decline of major socioeconomic institutions and infrastructure, the sour outlook for business and the entire credit for the rise of brunch. We often hear what is so wrong with Millennials, and how this generation has rocked the core of the once firmly-held beliefs about everything—from what is retail to how discretionary income is spent and the age-old question, paper towels vs. napkins?

And as Millennials age—the oldest in this set are well into their 30s—is it time to turn the attention to the next generation, Gen. Z, who is primed to truly shape what the economic world will look like for the foreseeable future? (According to *Fast Company*, Generation Z will account for 40 percent of all consumers by 2020.)

Defined as those born from around 1995 to somewhere in the mid to late 2000's (although this too is an open-ended debate), Generation Z is apples to oranges different when compared to the generations before it. They are digital innate (touchscreen at that), many having never even had the benefit/burden of a landline telephone, a dial-up connection or been without a debit card.

## AND AS MILLENNIALS AGE—THE OLDEST IN THIS SET ARE WELL INTO THEIR 30S—IS IT TIME TO TURN THE ATTENTION TO THE NEXT GENERATION, GEN. Z, WHO IS PRIMED TO TRULY SHAPE WHAT THE ECONOMIC WORLD WILL LOOK LIKE FOR THE FORESEEABLE FUTURE?

This generation is a social media native as well, having grown up in a world where their early childhood photos were certainly shared with their parents' peer group and their digital footprint was established likely around the time they were born.

So, what is this generation into then?

According to Nickelodeon's "The Story of Me" report, and arguably one of the leading ambassadors for this generation with a devoted finger on its pulse, Generation Z is diverse. It has known nothing but socially progressive causes and underpinnings beneath all it does, and certainly this generation is bombarded with info and intelligence thanks to 24-7 news cycles and on-demand everything. Generation Z has actively involved parents (about 30 percent of which are Millennials, and many of which include multi-generational households); has confidence, but must combat gripping issues like cyber-bullying; is fluent in digital friendships; and values education and personal betterment.

*Marketing Week* says that 70 percent of Gen. Zers "prefer a colloquial, friendly tone from brands they see on social." They value authenticity and they appreciate real people with organic connections.

This generation is also cause-based in many respects. They want the companies they buy into to reflect their personal values, and "brand status" has come to mean a different thing to the younger set. *Forbes* agrees, saying "Generation Z goes even further: they have made it clear that what they care about more than anything is feeling like they know the brand or the person behind the camera. They don't want to feel marketed to—they want to feel like they're part of something." This generation is often also characterized as desiring experiences over possessions, although a good influencer-led social campaign can do wonders for a brand in this demo. And brand loyalty isn't top of mind, whereas brand options are.

But let's be practical—of course we can't heap all the responsibility for our economic and social future on Generation Z. Millennials are exceedingly relevant, and the innovations this group of thinkers, entrepreneurs and innovators are making at the base level of business is astounding. In fact, *License Global* will play host to a high-level conversation between Millennials who are at the forefront of the massive shifts occurring in media and retail as they discuss the advantages and benefits of the new world that is evolving at the NYC Summit: The Business of Brand Licensing, taking place Feb. 20 at Convene Event Center in New York City ([www.NYCLicensingSummit.com](http://www.NYCLicensingSummit.com)).

Baby Boomers still buy too, let's not forget. And if you ask a Millennial, they might suggest that this group is the most affluent thanks to home ownership, lack of student debt, higher-paying careers and so on. ©

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# IT'S ALL ABOUT BUILDING BRANDS

Hasbro's Bryony Bouyer explores how licensing is more than a legality, and in the process, provides an inside look at the key ways licensors can build their brands.



by **BRYONY BOUYER**  
senior vice president, marketing operations, consumer products, Hasbro

Bryony Bouyer is the senior vice president of marketing operations within the consumer products division at Hasbro. Since stepping into the role in 2000, Bouyer has been responsible for setting and executing a strategy aimed at expanding the company's iconic brands including Transformers, My Little Pony, Nerf and Monopoly, among others, into key consumer product categories. During her tenure, Bouyer has expanded the My Little Pony brand into more than 70 countries across all major product and promotional categories and has continuously grown the Transformers portfolio, which has delivered more than \$12 billion in retail sales since 2014.

Being asked to be a guest editor for the 20th anniversary issue of *License Global* is quite the honor, and one that I do not take lightly. I continue to be awed by the power of licensing. The industry is fascinating: multiple, inter-connecting puzzle pieces that are, at times, vexing to put together, but at the same time can be extremely inspiring, rewarding and ever-changing. While the term licensing is used to describe the industry, it has become clear to me over the last 20 years that the term only describes the legal mechanics between the licensee and licensor. The real business that we are all in is building brands!

## Licensing as a Brand Building Mechanism

My entire career has been in marketing and brand building, including eight years at Reebok and 24 years at Hasbro. Over the years, I've been asked if I miss marketing and my answer is always, "I am building and marketing brands, we are just doing it via the licensing mechanism." Think about it: it would be very difficult for one company to be an expert in every single storytelling medium and product category.

Therefore, the only way to maximize a brand's potential is by working with companies who are experts in their respective industry via the licensing mechanism. By choosing the best partners to work with, everything that you do adds to the brand's value vs. diffusing its equity.

For example, Hasbro depends on its brand blueprint and cross-platform storytelling to bring its brands to life. We are able to inspire the consumer to travel with a brand across many points of engagement, ultimately unlocking a brand's full potential. From a corporate perspective, the licensing mechanism presents a relatively small financial risk (assuming the right brand protection components are in place), while having a high ROI on the direct income stream and the positive equity that it bestows on the overall franchise.

## The Company You Keep

One of the best ways to build brand caché is to collaborate with well-known artists, celebrities, tastemakers and other high-end brands. When done well, this type of collaboration can drive unparalleled brand equity, combining the unique aspects and strengths

of both partners, along with a certain "coolfactor," to deliver a wholly new user experience. Such initiatives by their nature also offer opportunities for special press events and pop-culture launch parties, garnering outsized media coverage. This coverage can then be translated into consumer demand, driving retail and further expanding your brand's footprint. Hasbro has been particularly successful in this regard, harnessing the "butterfly effect" of sometimes surprising partnerships and converting them into retail gold.

## The Product Story

When we think of story, we generally think of the most obvious storytelling mediums—publishing, television, film, etc. However, to build compelling consumer products across all categories, we need to be able to see the product in the story and the story in the product.

The best licensed products are those that leverage those story components—the DNA (what makes the brand special and unique) of the brand and product innovation—and places it in context of consumer trends. There are many programs and products that prove this and those in the industry that can combine the best franchise in the best categories with the right product will continue to win.

## When to Pull the Licensing Trigger

When to license a brand is a key question that is constantly wrestled with by all licensors. Expanding a brand before it's ready can be detrimental, but waiting too long can be a missed opportunity. Even the traditional movie licensing model can be heavily nuanced, as property holders, licensees and retailers rely on their strategic crystal balls (otherwise known as experience and gut) to determine if the property will successfully translate into consumer products.

While I'd love to say that there are predictors of success, I can only say that we must ask and answer a number of questions that will provide the right level of guidance. Questions like "What is the strength of the property?", "Who are the characters and do they appeal to a broad audience?", "Is the property graphically rich?" and "Can it be naturally translated to multiple categories?" And that's just the first layer of the licensing onion, as one question begets another. ©



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# MOBILE GAMING LEVELS UP

With nearly 187 million mobile gamers in North America alone, The NPD Group predicts that this industry has nowhere to go but up as more consumers gain access to smartphones.



Compiled by

The video game industry generated record-breaking revenue in 2017, exceeding \$30 billion in the U.S., an 18 percent increase from 2016, according to The NPD Group.

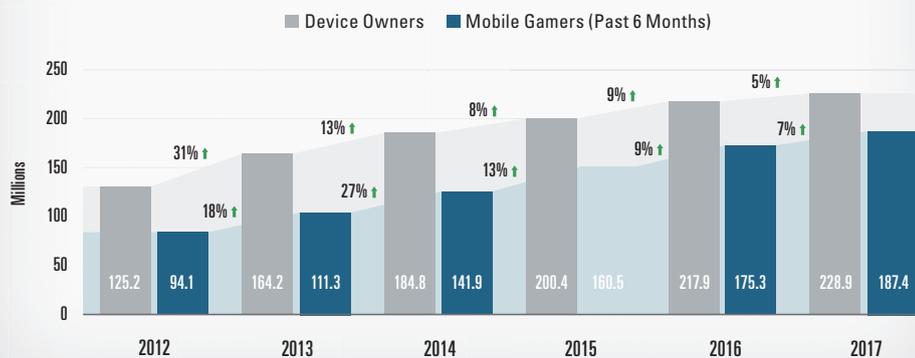
Excluding PC games, sales across all channels and categories were strong, especially in the mobile category.

According to Deconstructing Mobile and Tablet Gaming 2017, the latest report from video game research firm EEDAR, mobile spend, including paid downloads and in-game purchases for mobile and tablet

“THERE ARE 229 MILLION CONSUMERS IN THE U.S. AND CANADA AGES 13 PLUS THAT OWN OR HAVE REGULAR ACCESS TO A SMARTPHONE AND/OR TABLET. THE MAJORITY OF THESE DEVICE OWNERS PLAY MOBILE GAMES, TRANSLATING TO 187 MILLION MOBILE GAMERS.”

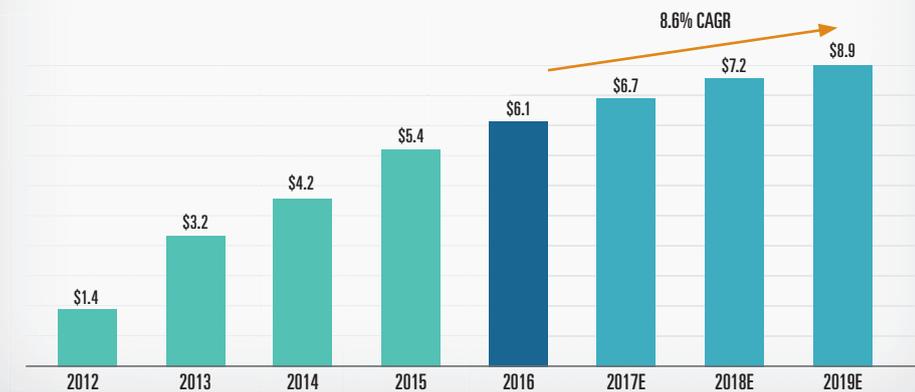
## Mobile Game Revenue by Year

2012 – 2017 | North America | Ages 13 and Older



## Mobile Game Revenue by Year

\$USD Billions | North America | iOS and Android



devices, was one of the stronger growth drivers in 2017. While growth of the mobile market has continued to slow as both the device and gaming markets begin to reach saturation—as of 2017, an estimated 80 percent of adults and teens either own or regularly use a smart device—the number of new mobile gamers entering the market are still increasing.

There are 229 million consumers in the U.S. and Canada ages 13-plus that own or have regular access to a smartphone and/or tablet. The majority of these device owners play mobile games, translating to 187 million users.

Comparing the genders, we see that current mobile gamers are generally more alike than different, with male and female gamers generally showing similar rates of dual-device usage and play. That said, the broader North American mobile gaming market continues to show a slight female majority overall. ©

SOURCE: EEDAR: Deconstructing Mobile and Tablet Gaming

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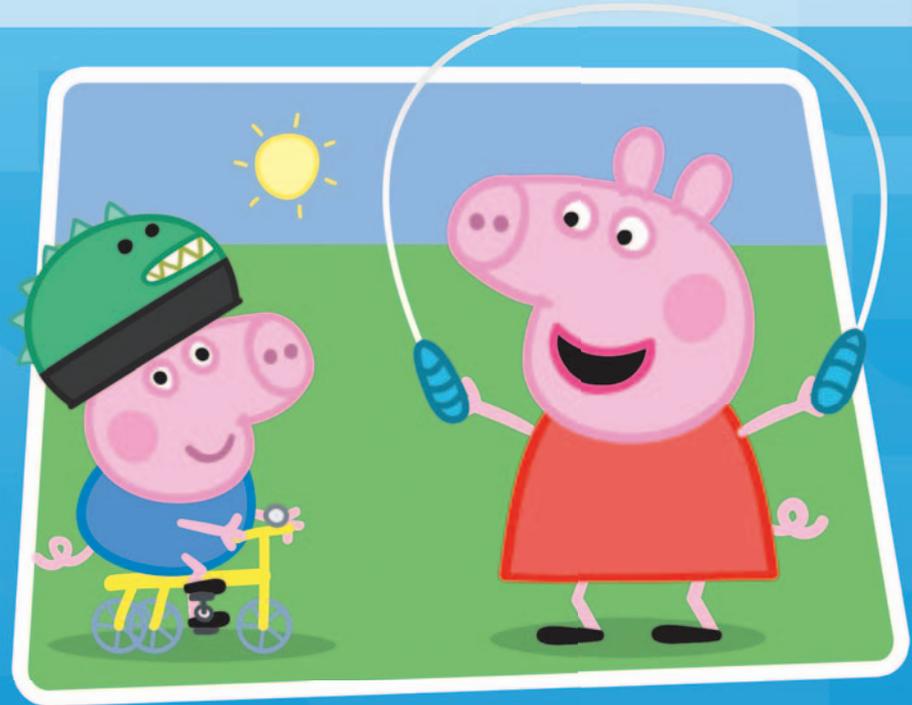
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# Boat Rocker Buys FremantleMedia Kids

Boat Rocker Media acquired FremantleMedia Kids & Family, a division of FremantleMedia last month.

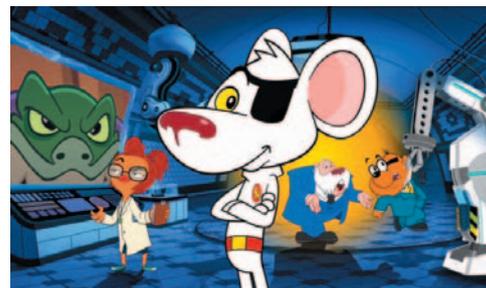
Under the terms of the agreement, the division will be absorbed into Boat Rocker's global distribution arm, Boat Rocker Rights. The acquisition is also expected to strengthen international growth opportunities in markets including Europe and Asia, according to *TV Kids*.

In terms of licensing, FremantleMedia is the world's No. 66 largest licensor, reporting \$600 million in licensed retail sales in 2016, according to *License Global's* annual Top 150 Licensors report. Although the acquisition likely won't have an immediate effect on the company's 2018 ranking, it will surely impact the future business as properties

such as "Danger Mouse," "Kate & Mim-Mim" and "Bitz and Bob" transition to Boat Rocker.

Moving forward, FremantleMedia's co-productions "Danger Mouse" and "Bitz & Bob" will continue to be developed under Fremantle's existing agreement with the BBC.

The deal also marks Boat Rocker's commitment to developing, producing and monetizing an expanded lineup of kids' content. Most recently, Boat Rocker acquired the full factual and lifestyle content catalog from Peace Point Rights, the distribution arm of Peace Point Entertainment Group. The company also purchased Jam Filled Entertainment, a Canada-based animation company, in late 2016 to grow its family and kids content.



# Emoji Kicks Off 2018 Strong

While The Emoji Company posted an impressive 2017 with a robust assortment of merchandise, agency appointments and more, the emoticon brand is gearing up for another successful year with new licensees and promotional activity worldwide.

Since Brand Licensing Europe, which

took place Oct. 10-12, 2017, at London's Olympia, the company has secured 32 new licensing agreements. New partners for the brand include Ferrero, Listerine, De Facto, Nestlé Waters, Nocilla, Bejing Gold, Koton, La Poste France, Chipita and Cola Cao, among many others. Emoji also appointed J&M

Brands to manage its licensing and retail partnerships across the Benelux region.

But, The Emoji Company isn't stopping there. The company is currently in negotiations for an additional 60 licensing agreements worldwide, which are expected to close in the coming weeks.

Most recently, the brand teamed with fashion designer Edward Crutchley to develop a collection of apparel. The new fashion range, which was unveiled at London Fashion Week Men last month, features an assortment of imagery from Emoji's catalog of more than 7,000 icons, patterns and stickers, and will be available this fall/winter. The brand also partnered with Zippo for a collaboration. Further details will be disclosed at a later date.

Additionally, the first range of Emoji-themed collectibles are set to hit the toy market later this year.

Throughout the year, The Emoji Company will continue to execute new licensing agreements, and expects to see above average growth in emerging markets including Brazil, South East Asia and the Middle East.



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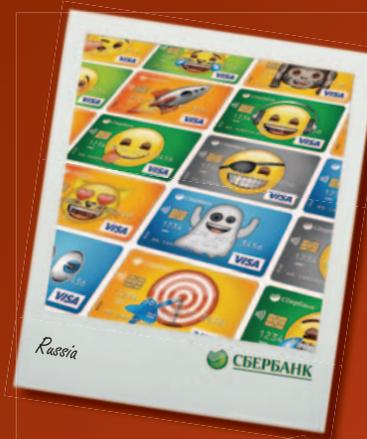
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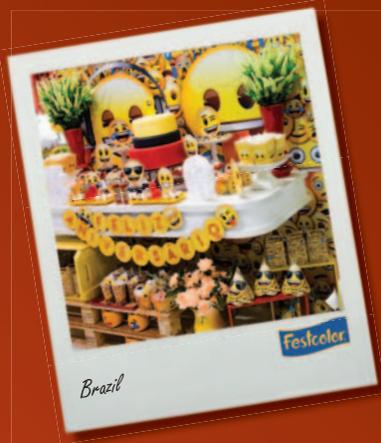
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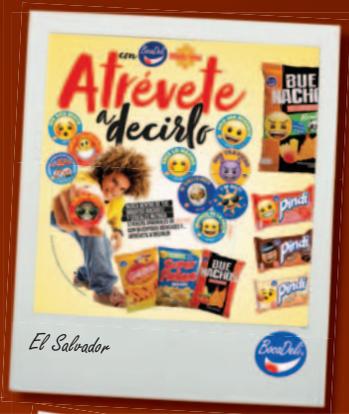
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# Saban Fetes 25 Years of 'Power Rangers'

Saban Brands is gearing up to celebrate the 25th anniversary of "Power Rangers" with a multi-platform campaign spanning digital content, consumer products, strategic partnerships and collaborations.

"Our anniversary campaign is designed to inspire nostalgia as well as encourage our young fans to unleash their inner superhero," says Janet Hsu, chief executive officer, Saban Brands.

Debuting in 1993, "Power Rangers" quickly became a pop culture phenomenon and a Saturday morning staple for a generation of fans. Twenty-five years later, the franchise remains a consistent performer with the original series, its spin-offs, films and consumer products.

In 2010, Saban re-acquired "Power Rangers" from The Walt Disney Company, which held the property for seven years. Under Saban, the "Power Rangers" brand boasts more than 150 licensees and is instrumental in positioning the company at No. 57 on *License Global's* Top 150 Licensors report. Other recent successes include the brand's latest film, *Saban's Power Rangers*, which grossed more than \$142.3 million worldwide.

The "Power Rangers" 25th anniversary campaign kicked off last month with the "Top 25 for the 25th," which sees exclusive products from partners such as Bandai, nWay, Boom! Studios and Imaginext release online on the 25th of each month. In January, the campaign featured a re-release of the "Mighty Morphin Power Rangers" Auto Morphin figure, which is one of the first (and now iconic) fan-favorite toys, according to Hsu.

Saban is also planning to celebrate the franchise by engaging audiences across multiple platforms.

"Our 25th season premiered last month on Nickelodeon and will include a highly-anticipated anniversary episode," says Hsu. "We are focused on activating and driving engagement among our target audiences on key digital platforms including YouTube, Facebook and Instagram, as well as our fan



hub, RangerNation.com. We will also be releasing exclusive anniversary products including a comic book cross-over event, new updates in our 'Power Rangers: Legacy Wars' mobile game and all-new collector toys, amongst other exciting initiatives we'll look to surprise fans with."

Saban will also engage with online influencers from YouTube and Instagram to highlight the brand's messages of empowerment and community action.

"We will be launching a call to action campaign, 'Power Rangers: You've Got the Power,' which will inspire our younger generation of fans to unleash their inner superhero," continues Hsu. "We are partnering with a cause leader to amplify

our empowerment message throughout the year. We are extending this campaign through product collaborations, influencer partnerships and consumer products."

The "Power Rangers" brand is also among the few franchises to create a cult following across generations and relies on the importance of nostalgia to attract older consumers.

"To engage our adult fans who grew up with 'Power Rangers,' we will be leveraging the franchise's nostalgia with coveted new products as well as re-releases of iconic collector items and more."

Consumers can visit RangerNation.com for monthly "Top 25 for the 25th" reveals as well as a nostalgic website complete with "Power Rangers" history.

# 'The Powerpuff Girls' Turns 20

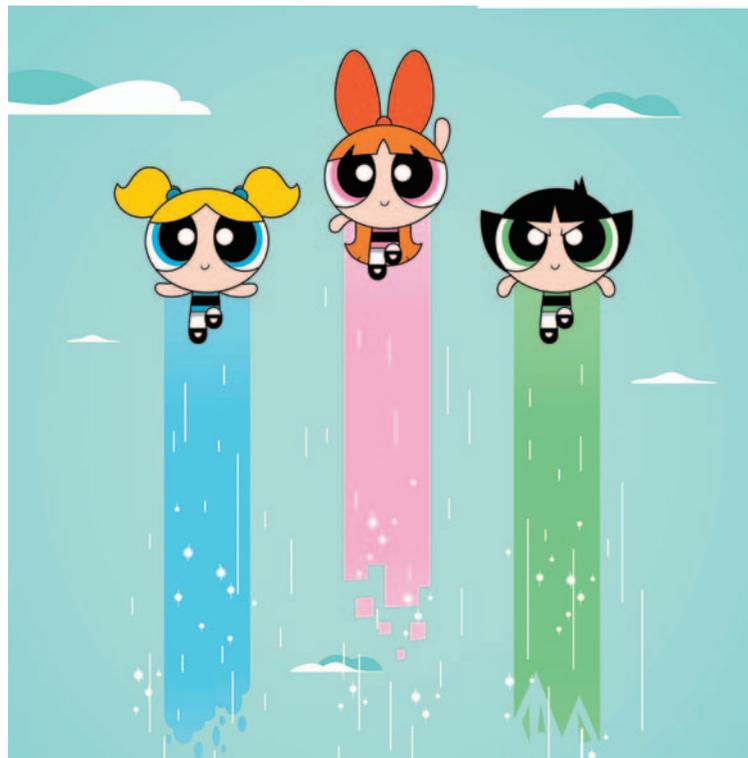
Cartoon Network will celebrate a milestone this year with the 20th anniversary of its popular animated series "The Powerpuff Girls," which initially debuted in November 1998.

The celebration will kick off this month with a global rollout of new episodes. Cartoon Network is also planning a host of events and products, which launch this year and continue into 2019. Blossom, Bubbles and Buttercup's fourth sister, Bliss, will also return throughout the year.

Since its original debut, "The Powerpuff Girls" has partnered with more than 150 licensing partners worldwide and has generated more than \$2.5 billion in retail sales, according to Cartoon Network. Previous licensees of the brand have included Jeremy Scott, Hot Topic, Miniso, El Corte Ingles, Reserved, Fyodor Golan, Spin Master, McDonald's, Ferrero, Cold Stone Creamery, Live Nation and Hachette, among many others.

Additionally, Cartoon Network recently teamed up with fashion designers The Dots, Efisio Marras and Alessandro Enriquez to showcase several new capsule collections inspired by "The Powerpuff Girls" at Pitti Bimbo, which took place Jan. 18-20 in Florence, Italy. Each capsule collection is inspired by the superhero sisters and features items ranging from t-shirts and dresses to handbags and accessories.

"The Powerpuff Girls' is one of the most enduring Cartoon Network brands of all time and continues to resonate strongly with fans across the globe," says Johanne Broadfield, vice president, Cartoon Network Enterprises EMEA. "It's also proved to be a brand that inspires designers and we're excited to be partnering with Pitti Bimbo to cement the girls as fashion icons for 2018 and beyond."



## Going to Licensing Expo? You Need Matchmaking

Licensing Expo is bringing back its Matchmaking Service again this year, and with it comes a host of success stories, marking the official one-to-one business networking tool as a must-have for exhibitors and attendees looking to make the most of the show experience.

The custom-built online networking service gives registered attendees and exhibitors the ability to pre-book on-site meetings and to quickly and easily search for new potential licensing partners according to business objectives. The Matchmaking Service will even act as an attendee's personal secretary, with a detailed itinerary function and meeting reminders sent via email or text.

Last year, the Matchmaking Service helped show-goers book more than 3,800 meetings (1,217 of those between U.S. and international companies), with retailers showing the most engagement, says Licensing Expo.

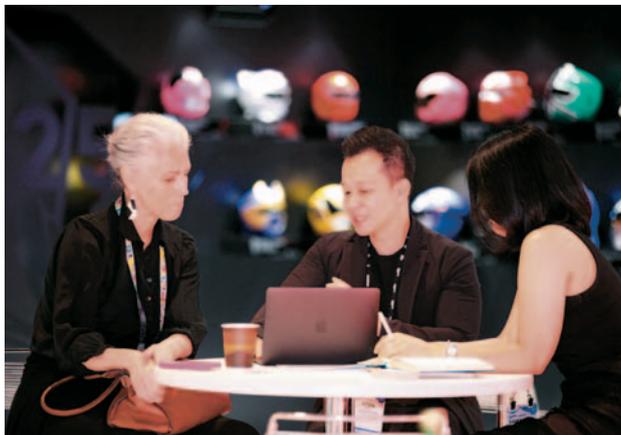
"Card.com works with a number of

national and international brands. I used the Matchmaking Service to help facilitate my Licensing Expo appointments with qualified, nationally known and international brands," says Linda Castillon, senior vice president, licensing, Card.com. "I will use it again in 2018."

Exhibitors agree that the service is especially useful.

"Through the Matchmaking Service, we set up more than 100 meetings with various qualified companies," says Michael Wethwein, creative director, Hang Ten. "We were also fortunate enough to secure several deals that were a direct result of being able to pinpoint which companies would be the best fit for our brand."

Licensing Expo will return to the Mandalay Bay Convention Center in Las Vegas, Nev., May 22-24. For more information or to register for the Matchmaking Service for free, visit [www.LicensingExpo.com/Register](http://www.LicensingExpo.com/Register).



# YOU THINK YOU KNOW THE WIGGLES? THINK AGAIN!

An iconic global pre-school brand with 27 years of success. The Wiggles continue to have top rating TV programs, now on NBC/ Universal Kids, Treehouse and streaming on Hulu and also on Netflix across 190 countries. Additionally, engaging & exclusive content is developed for The Wiggles social media channels - YouTube, Facebook, Instagram & Twitter. In fact, in the last twelve months our Youtube channel in the USA has seen triple figure growth for view count, subscriber count (120%) and watch time (over 113,000,000 minutes). With extensive live touring across North America, Australia and New Zealand each year and a proven consumer products program, The Wiggles and Wiggles products are in strong demand across the globe.

"THE WIGGLES HAVE BEEN A SPECTACULAR HIT ON HULU" SAYS ANDREW THOMAS, CONTENT ACQUISITION

"WIGGLE WIGGLE WIGGLE!" IS ONE OF THE TOP 5 RATING PROGRAMS ON TREEHOUSE



# Emma!

## OUR DANCING QUEEN!

The Wiggles fans have spoken, Emma is their favourite! She has expanded our audience. Our dancing queen Emma, was trained in Ballet, Jazz, Tap, Contemporary, Hip-Hop and Irish dancing. Emma's role as the Yellow Wiggle has resulted in the creation of another Wiggles brand, simply titled Emma! Dolls, dress-ups, girl's accessories, role play, ballet mat and barre, are new product categories desired by Emma fans all over the world!

"One of the most credible female role models for this generation of children." Says Anthony Field

The Most Popular Wiggle EVER!



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For licensing, marketing or promotional opportunities please contact  
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# The Wiggles Dance into a New Era

The Australian children's entertainment group, The Wiggles, are in the midst of a refresh. The 27-year-old franchise re-emerged some six years ago with three new band members and are once again taking the world by storm. With a live show, six series broadcast on various networks around the world, sponsorship opportunities and an expansive consumer product program, The Wiggles have reclaimed their title as the No. 1 children's entertainment group in the world, according to Paul Field, managing director, The Wiggles.

The early part of the decade saw the band lose three of its founding members—Murray Cook, Greg Page and Jeff Fatt. But

replacements Simon Pryce, Lachlan Gillespie and the band's first female member, Emma Watkins, have since joined founding member Anthony Field, and the synergy and formula that has captivated preschoolers everywhere is back.

After joining the group in 2011, Watkins has gained popularity with audiences and whom Field credits with broadening The Wiggles' fan base. The Wiggles say that the addition of Watkins has increased the brand's presence in the girls' toy aisle with a focus on dance, dolls and girls role play.

"Emma is a terrific role model for all children—not only does she sing and dance during the shows, but she signs [Auslan], plays the drums and drives the Big Red Car," says Field.

One of Watkins' signature products, The Bowtiful Ballet Studio, a home ballet studio for preschoolers, sold out in Australia within 24-hours. There is now an extensive range of Emma toys, books and apparel that complement The Wiggles' original focus around music.

The Wiggles' multi-platform "refresh" is attracting interest from a number of licensees in North America. Fun 2 Play Toys has signed on as the master toy, Kino Lorber for home entertainment and Stoneridge Cycle for sporting goods such as ride-ons and foot-to-floor.

The Wiggles' live shows, the cornerstone of the brand, have always been popular, and last year, The Wiggles performed to more than 330,000 fans throughout Australia, New Zealand, the U.K., Ireland and Canada. In Canada alone, The Wiggles performed to nearly 50,000 fans across 27 venues. They will repeat the Canadian tour this fall and are also adding the U.S. to the tour schedule this year, performing on the West and East Coasts beginning in mid-June.

The enduring success of The Wiggles is best encapsulated by Ben Elton, an international writer and director who says: "The core of The Wiggles is their humanity—the human scale of what they do. They are not



puppets and they are not cartoons, they are real people. There is something life-enhancing about The Wiggles. There is a spirit, a good nature that runs through them."

"The Wiggles experience at a live show is complemented by an extensive tour merchandise offering with a range of age-appropriate products to enable memories of The Wiggles to 'live on' far after the show has finished," adds Field.

The Wiggles currently have a number of television series including "Ready, Steady, Wiggle!," "Wiggle, Wiggle, Wiggle!," "Wiggletown!" and "Lachy! Emma!," as well as many specials currently broadcast on ABC in Australia, NBCUniversal Kids and Hulu in the U.S., Treehouse and Netflix in Canada and a further 190 countries around the world.

Recently, The Wiggles produced YouTube-specific content including "The Wiggles Nursery Rhymes" and "Emma's Bowtiful Ballet," which has collectively gained more than 25 million views in a relatively short period of time. The Wiggles have since engaged in collaborations with Super Simple Songs and Mother Goose Club, which have further enhanced The Wiggles' viewership.

"Over the past 12 months, our engagement through YouTube has risen dramatically," says Field. "We are seeing triple-digit growth in North America alone which is further enhancing our reputation as the world's favorite preschool group."



A close-up photograph of Kirk Cousins, a professional football player, wearing a maroon Washington Redskins jersey with the number 9. He is looking directly at the camera with a serious expression. The background is a textured, grey wall.

A PLAYER WHO CAN  
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**NFLPA**

# Random House Crafts New Properties

Random House Children's Books is set to launch two new brands and product lines this year.

The new ranges are the product of Random House's new licensing function and a renewed interest in the development of author and illustrator properties.

First, Random House will capitalize on the success of its best-selling book *Wonder* by unveiling a new children's brand that reflects the novel's themes of inner beauty, imagination and choosing kindness, which have been supported on social media with the hashtag #choosekind.

To-date, Random House Children's Books has partnered with Clarkson Potter for a set branded stationery and journals, which are available exclusively at Target. Additional licensees include Changes for t-shirts at Hot Topic, Out of Print for accessories, Raymond Geddes for anti-bullying-themed classroom supplies and SG@NYC for jewelry. A line of We're all Wonders plush toys will also be introduced in the spring by Yotttoy Productions.

R.J. Palacio's *Wonder* follows the story of a



young boy with a severe facial deformity and his journey to acceptance. *The New York Times* best-seller has sold more than 9 million copies and was adapted into a film of the same name.

Meanwhile, Random House Children's Books will introduce a new lifestyle brand based on the best-selling picture book *The Wonderful Things*

*You Will Be* by Emily Winfield Martin. Dubbed, Dream World by Emily Martin, the line will cater to Millennial moms of infants and toddlers.

To celebrate the new brand, the publishing house has partnered with Finn + Emma for apparel, accessories and toys, and Milestone for cards.

*The Wonderful Things You Will Be* highlights the themes of dreams, parental love and acceptance through humor and rhyme. The book has held a top position on *The New York Times* best-sellers list for more than a year and has sold over 1 million copies.

"The enthusiasm has been strong from the market since day one, and that is a testament to the strength of these unique and successful book properties," says Rachel Bader, director, licensing, Random House Children's Books. "We are delighted to introduce these gorgeously curated products to the trade, and look forward to our continued development of other lines based on some of the best author and illustrator properties in the world of children's publishing."

# Nick All Aboard for 'Thomas & Friends'

Mattel and Nickelodeon have inked a U.S. television and consumer products partnership for the preschool property "Thomas & Friends."

The agreement will see new seasons of "Thomas & Friends" premiere on the Nick

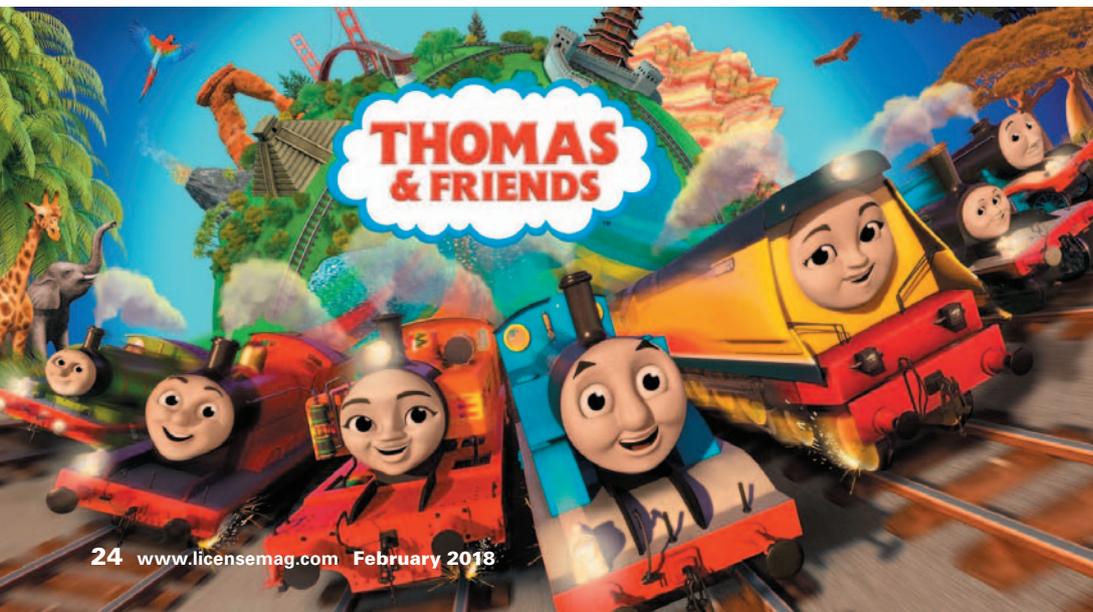
Jr. channel, with specials set to air on the Nickelodeon network throughout the year.

Nickelodeon will also become Mattel's exclusive U.S. consumer products agent for "Thomas & Friends" across multiple

merchandise categories including apparel, accessories, home goods, consumer electronics and more.

"Securing Nick Jr. as our new home for 'Thomas & Friends' is a huge game changer for the brand franchise, and one that, alongside our re-imagined content direction, will enable us to captivate new audiences as well as deepen engagement with our existing fans in the U.S.," says Kate Schломann, vice president and global brand general manager, "Thomas & Friends," Mattel. "The brand is undergoing a huge evolution to ensure that it remains relevant and competitive for today's audiences. We are taking Thomas off Sodor for the first time in our episodic series, evolving our storytelling to be more inclusive, meaningful and entertaining, which will strengthen our brand franchise. We are thrilled to have Nick Jr. as our partner as we bring the world into a child's home through the eyes of 'Thomas & Friends.'"

The new season of animated preschool series will debut on Nick Jr. in March.





# Toys 'R' Us Shutters 180 Brick-and-Mortars

Toys 'R' Us will close approximately 180 locations and convert a number of stores into co-branded Toys 'R' Us and Babies 'R' Us locations.

According to a company statement, the closures are part of a company-wide initiative to restructure and re-focus following its bankruptcy filing in late November. Dave Brandon, the company's chief operating officer, admitted to operational "missteps" and rolled out plans for re-inventing the company's brands and prioritizing company goals.

"The actions we are taking are necessary to emerge from bankruptcy proceedings as a more viable and competitive company that will provide the level of service and experience you should expect from a market leader," says Brandon.

Toys 'R' Us will continue to operate physical stores across major markets in the U.S. and around the world, as well as online, and will continue to honor its customer loyalty program.

Impacted stores are expected to begin closing as early as this month, with the majority of locations shuttering in mid-April. During the closing period, the company will offer a variety of discounts and deals across merchandise categories.

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**Season 1 Available on Netflix**

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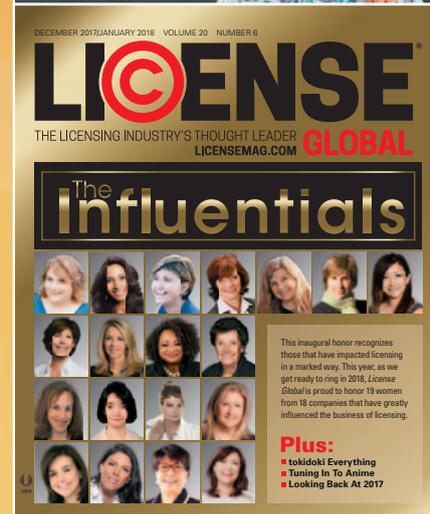
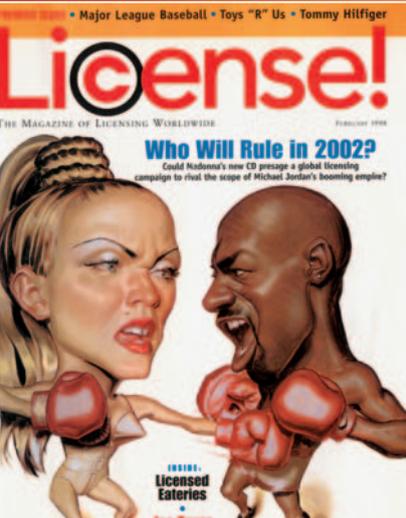
Natasha Khavin Gross  
TV Sales and Licensing Director  
natasha.gross@sunrights-inc.com



# LICENSE GLOBAL TURNS THE PAGE ON 20 YEARS

Since its debut in February 1998, *License Global* has not only been an industry leader, but an essential source of news and insight for the licensing industry. Now, 20 years on, the magazine continues to serve as a crucial source for licensors, licensees, manufacturers and retailers looking to make a mark in the industry. Take a look at how *License Global* has helped to shape brand licensing.

by ERICA GARBER

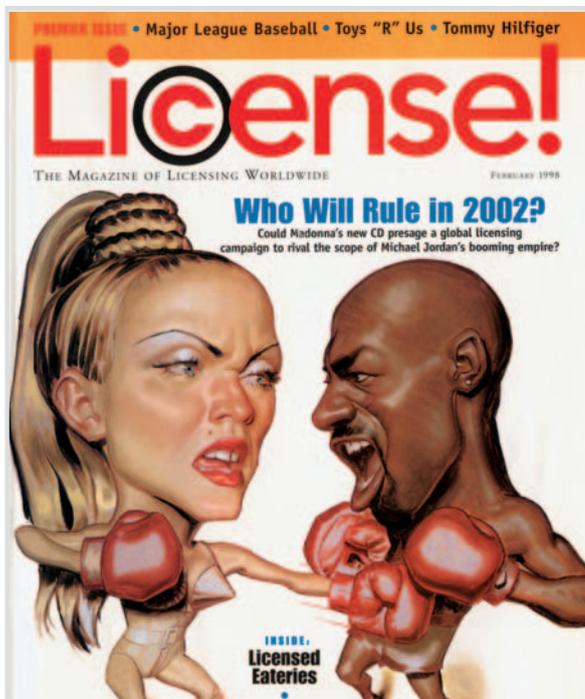


As licensing began to emerge as a viable business in the 1990's, the need for an industry-specific publication became apparent, and when a prototype issue of *License Global* debuted at Licensing Expo in June 1997, the positive reactions were overwhelming. As the industry made leaps and bounds forward, *License Global* was also there making significant strides forward as the business' indispensable thought leader.

Shortly after the publication debuted its prototype issue, the magazine's investors fell through, necessitating the need to find funding for the first published issue via advertising... all in three short months. Fortunately, the magazine secured advertising from major companies like Viacom Consumer Products, Warner Bros. and Saban Brands, among many others.

In February 1998, the very first issue of *License Global* was published and featured an illustrated image of Madonna boxing it out with Michael Jordan for the licensing crown.

"Celebrity licensing was really big," says Steven Ekstract, group publisher, *License Global*, and now brand director, licensing, UBM. "The idea was to do something that would really capture people's imaginations and get them to pick up a new magazine. At the time, Michael Jordan was already on the downside



## LICENSING EXPO PARTY TO FETE LICENSE GLOBAL

UBM's Global Licensing Group is also gearing up to celebrate *License Global's* 20th anniversary during Licensing Expo's Opening Night Party.

Taking place May 22 from 7:30-10:30 p.m., this year's party will return to the Mandalay Bay with a new format to better encourage networking. Early bird tickets for the can't-miss networking event will be available for \$65 and \$50 for LIMA members.

LAS VEGAS  
**LICENSING EXPO**  
**OPENING NIGHT PARTY**  
Celebrating 20 Years of **LICENSE GLOBAL**

Licensing Expo, the world's largest and most influential licensing industry event, will take place May 22-24 at the Mandalay Bay Convention Center in Las Vegas, Nev. For more information visit [LicensingExpo.com](http://LicensingExpo.com).

of his career, but he had done tremendous licensing deals, and Madonna had been around since the early '80s, but was constantly re-inventing herself."

Up front, the magazine published various news from the industry (similar to today's BizBriefs section), as well as editorial segments dedicated solely to entertainment, publishing, corporate brands, sports, art and other categories—something that hadn't been done before.

"We believed that one area of licensing could inform every other area," says Ekstract. "If you worked in fashion, you could learn from entertainment. If you were in publishing, you could learn from people in the art business through the deals being established."

Following the launch of its debut issue, *License Global* was approached by Advanstar (now owned by UBM), which had recently picked up Licensing Expo from the International Licensing Industry Merchandisers' Association and believed each of its trade shows should have a lead publication. Eventually, Advanstar acquired 50 percent of the *License Global* business, excluding editorial control, with a three-year buyout option. The move marked *License Global* as the official publication of Licensing Expo. In 2000, Advanstar opted to purchase the remainder of the publication and assisted in *License Global's* worldwide expansion.

During the publication's first decade, it covered





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a breadth of topics including the delayed response to *Titanic's* merchandising program, corporate brands like Mr. Clean and Jeep, celebrities such as Kathy Ireland and Britney Spears, a score of art brands and more.

*License Global* also launched in-depth reports such as the magazine's most notable report, the Top 150 Global Licensors, which actually began in April 1999 as the Top 50 Licensors. As the ranking became popular, it expanded first to 75, then to 100 and 125, and finally to 150. Today, the report provides retail sales data on the world's largest licensors across all categories and provides valuable insight about the world's most important and well-known brands.

*License Global* wasn't always known as *License Global*. The magazine initially launched as *License!* with a focus solely on the U.S. market. However, after Advanstar acquired Brand Licensing Europe, the company's U.K. team launched *License! Europe* to further promote the licensing industry. Eventually *License! Europe* and the U.S. publication merged operations in 2006. In January 2007, the first issue of *License! Global* made its debut to executives worldwide with stories examining business around the world.

In the last 10 years, *License Global* has published a host of in-depth features, anniversary salutes, trend reports and more on innovative and evergreen brands (such as *Star Wars*, "The Simpsons," *Harry*



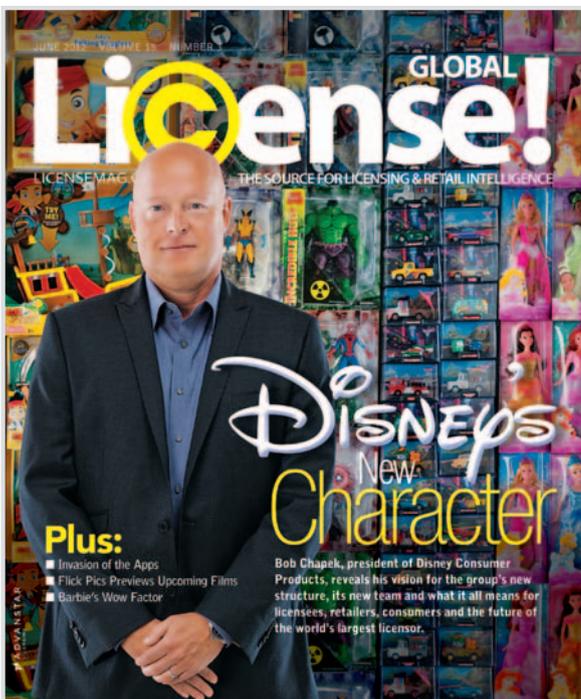
Potter, KISS, Lamborghini, Meredith and many more diverse topics) and has identified key industry trends (such as virtual reality, experiential events, pop-up retail activations and influencer marketing).

Following the .com boom, the publication launched its first daily e-newsletter in early 2008, further connecting licensing and retail executives worldwide with the latest industry news, five-days-a-week.

Today, *License Global* is the leading source of news and trends for the global consumer products industry. Not only is it the definitive day-to-day resource for licensing, but it is also the publication of the industry's top annual events—Licensing Expo and Brand Licensing Europe—where it provides on-site coverage in daily special editions.

While the magazine celebrates its 20-year history and accomplishments this year, it also has substantial goals for the future as it continues to transform alongside the licensing business. And while you likely won't see any licensed merchandise from *License Global*, you may be seeing more new developments from the magazine in the next five years.

"I believe that our next step is video product," says Ekstract. "I think that our industry lends itself very well to it and it's a natural evolution, which is part of the reason we launched LicenseTV. Although it's still in its infancy, we're the first to be doing it in our part of the business and I think we'll get there." ©





# A 365 View

Warner Bros. Consumer Products' Pam Lifford talks to *License Global* about what makes the powerhouse studio's licensing division hum, as well as gives us a glimpse into innovations on the horizon.

by AMANDA CIOLETTI

**W**arner Bros. Consumer Products has some tricks up its sleeve. With major milestones this year (*Harry Potter* turns 20!), as well as evergreen and new properties in its portfolio, it's easy to understand why Pam Lifford, president, Warner Bros. Consumer Products, is bullish on the future.

Lifford took the helm of WBCP just two short years ago, and since then, has moved the studio's product group forward, strengthening its global team and integrating the division more deeply into the infrastructure of Warner Bros.

With a pedigree that includes senior roles at both Disney and Nike, Lifford is focused on making this year one of the best yet for WBCP and continuing to grow the business' 365-day core strategy.

So what's that plan?

Focusing on specific programs to drive excellence across WBCP's key franchises is integral to Lifford's blueprint—she understands that extending the fan experience through engaging products is critical in supporting and increasing franchise longevity and in offering that 365-day consumer product business that most shoppers have come to expect from brands.

**PAM LIFFORD**

president, Warner Bros. Consumer Products

J. K. ROWLING'S WIZARDING WORLD.  
THE SPELLBINDING WORLD OF HARRY POTTER AND FANTASTIC BEASTS



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BROS. ENTERTAINMENT INC.



“The goal for our 365 program—the very definition—is to better manage the flow between content and film releases,” says Lifford. “We have evolved the traditional Warner Bros. model to not only create year-long programs at retail, bridging theatrical and home entertainment releases as well as new programming, but to also create a deeper consumer connection to those franchises through innovative product and touchpoints that allow fans to continue the storytelling long after they leave a store.”

An example of a key franchise that clearly illustrates her 365 approach? Batman.

“When we look at Batman—the No. 1 global superhero in our DC consumer products portfolio—we’re looking at it as a 365-day opportunity,” says Lifford. “We leverage every form of content, from blockbuster films, animated series and comic books to consumer products, programs and promotions, offering something for every age. We’re always driving our 365-day core business to engage and deliver a Batman for every fan.”

WBCP carries out this 365-day model for its worldwide business through a carefully crafted global, regional and local infrastructure.

“I’m a firm believer that, in order to truly be global, there are some aspects of the brand execution that are non-negotiable, and the success of our franchises is really based on how we fiercely protect the IP and the strategy behind our brands while remaining locally relevant,” explains Lifford. “The activation and execution is where the creativity of the local market comes into play and drives the connection across a diverse global consumer base.”

Not surprisingly, WBCP plays in all the major global markets—EMEA, with the U.K. as its largest territory; North America, including the U.S. and Canada; South America, with Brazil as its largest territory; Asia-Pacific, including China and Japan; and Australia/New Zealand. Altogether, WBCP manages more than 90

different territories through established WBCP offices and licensing representatives.

China, the collective business world’s brightest

opportunity, as well as its biggest challenge to tackle, is getting special attention.

“China, in general, is really anyone’s game, so establishing yourself and having relationships there are extremely important. Our company is well-positioned in China, on both a content level and retail relationship level,” says Lifford.

WBCP is currently establishing an office in the country, with more details to come soon.

The changing retail landscape is a pressing topic for everyone in business, and WBCP is no exception.

“Digital disruption is a big cloud hanging over the entire industry,” says Lifford. “We, as a studio and consumer products group, feel it just as our competitors and retailers feel it. The other key piece is content, and there is a lot of it. So how do you break through the clutter? You put the fan first. Through enhanced storytelling and innovative differentiation, we hit all touchpoints. This allows us to leverage big screens and small screens, social media and themed entertainment, to create that fan engagement experience.”

Lifford says her goal is to meet shifting retail challenges in two distinct ways: through an omnichannel approach and with innovative retailtainment experiences.

“We’re all in this competitive market and everyone is scrambling to have their strategy in place and working. I can say we’re definitely in the game, evolving our strategy and continuing plans to become a major player in the omnichannel environment,” says Lifford.

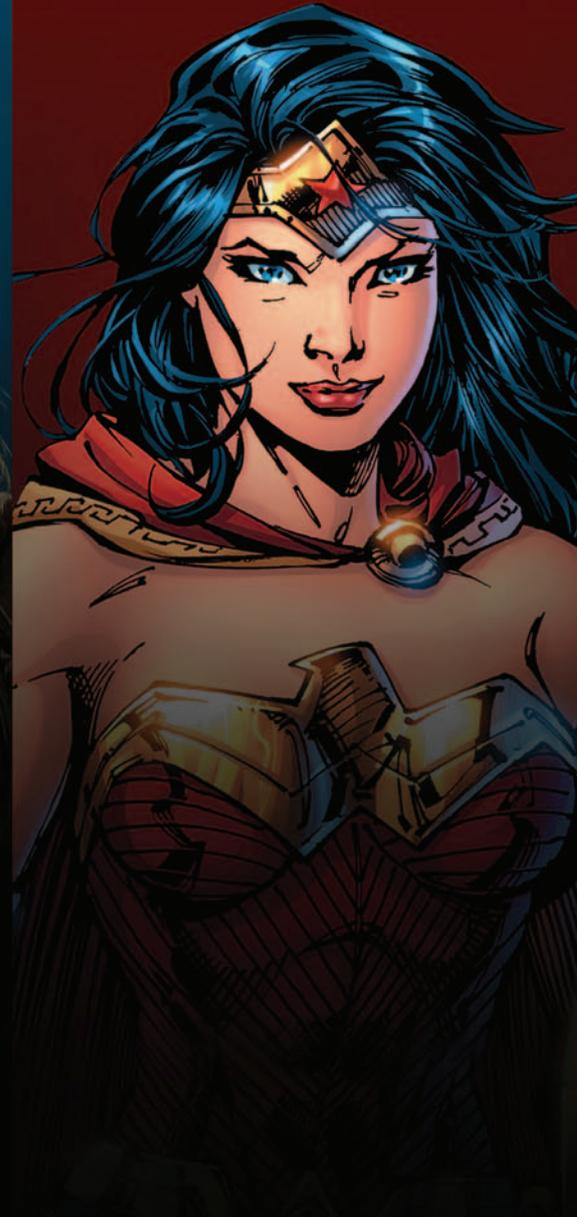
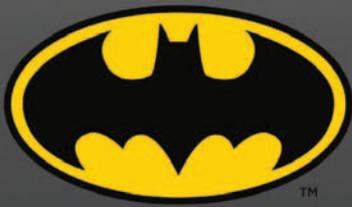
The in-store experience cannot be minimized however, and Lifford has crafted a savvy plan. Dubbed “365+,” the strategy aims to squarely position WBCP to meet both retailer needs and consumer desires and habits.

“The 365+ strategy is our ability to leverage Warner Bros.’ robust library of content that extends beyond our core franchises and allows a retailer to create a unique fan experience with a true point of difference that they can own,” says Lifford. “By tapping into content that is near and dear to millions of fans globally, we can help retailers drive consumer loyalty as a brand destination, fueling retailtainment while remaining true to our core strategy to extend storytelling for the fan.”

Lifford describes “retailtainment” as a true in-store experience that, of course drives traffic to shelves, but also creates a larger buzz and cultural conversation, making the participating retailer a destination. Lifford believes the experience must be brought to life through synergized support, both in-store and digital, to drive consumer engagement and loyalty with today’s more sophisticated fans.

“One of my first initiatives was to narrow in our focus on the key





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franchises from Warner Bros.' huge portfolio of content that we felt best translated to consumer products," explains Lifford. "We now partner with a specific retailer on a brand where we can give our partner ownership, create differentiation and provide marketing support to drive a true retailtainment experience for their consumer."

But at the end of the day, a good strategy is only as strong as the portfolio it stands on, and WBCP is certainly not lacking there.

First, there's *Harry Potter*, who's got a major milestone to celebrate this year.

"2018 is going to be the year of *Harry Potter*," Lifford proclaims. "There will be more activations and support happening in the marketplace, including direct engagement with our fans, than you've ever seen us do before. It's the 20th anniversary of the first *Harry Potter* book in North America, so we're going to show up in a big way."

In the U.S. (the U.K. launched its own celebrations last year), the 20th anniversary kicked off at Universal Orlando Resort in January with "A Celebration of *Harry Potter*," a weekend-long fan event that gave attendees up-close and personal experiences with the films' stars, a concert series, interactive activities such as an in-park scavenger hunt, a virtual reality experience from Warner Bros. Home Entertainment, special displays at the *Harry Potter* Expo, panel conversations and demonstrations throughout the park's Wizarding World area. Warner Bros. Interactive Entertainment (via its Portkey Games label) even rolled out a new mobile game, "*Harry Potter: Hogwarts Mystery*," during the event.

The anniversary will further be supported with a number of new products and experiences that tie back to franchise tentpoles (including the next installment of the new film series from the Wizarding World, *Fantastic Beasts: The Crimes of Grindelwald*, due in theaters in November) and has launched some break-through partnerships with best-in-class licensees.

"Throughout the years, we've had a collaborative relationship on our *Harry Potter* and Wizarding World publishing program, and this is even more apparent this

year with the 20th anniversary celebration in the U.S.," says Debra Dorfman, vice president and publisher, global licensing, brands and media, Scholastic. "One of our major goals is to reach as many kids, parents and educators as possible, and WBCP has been supportive of our efforts to create specific products that will appeal to a wide audience."

Retailers have also shown their support for the *Harry Potter* brand.

The U.K.-based Primark rolled out an extremely well-received program of apparel, homewares and gifts last year, which Lifford says was one of the largest retailtainment programs for *Harry Potter* ever, and will continue in 2018.

And the PBteen brand, along with its sister company Williams-Sonoma, launched an extensive range of home décor inspired by the magical world of *Harry Potter*.

"The PBteen collection was probably one of the most beautiful executions we've ever done—it represents true design innovation," says Lifford. "WBCP re-imagined *Harry Potter*-inspired consumer products in a unique, sophisticated way. Innovation is essential, but it ultimately comes to life when the partners you choose share in the same passion for the IP—and that is when the magic happens. Our goal is to not go out there and just do items, but to align with partners that understand our brands and allow boundary-breaking execution."

The DC universe is also crucial to the WBCP portfolio. "The DC brand continues to be a key focus," says Lifford.

Coming off a stellar year for *Wonder Woman*—the summer 2017 blockbuster has since raked in more than \$821 million around the world, according to Box Office Mojo—and with a major consumer products program in place, this year will continue emphasizing the characters from *Justice League* as *Aquaman* readies for its December feature release. WBCP will bring together licensees, retailers and an enhanced digital platform, Experience Atlantis, to create a worldwide program to support



the aquatic, half-human, half Atlantean superhero in his first stand-alone feature film.

Also in partnership with DC Entertainment comes *Teen Titans Go! to the Movies*, a new Warner Bros. film based on the animated series. WBCP will roll out a global merchandising program that will include action figures, vehicles, play sets from Mattel and Fisher-Price's Imaginext line; costumes from Rubie's Costume Co.; Pop! vinyl figures from Funko; and more.

Continuing to execute against Lifford's vision to remain culturally relevant, Warner Bros. Consumer Products and DC Entertainment's "DC Super Hero Girls" will continue to play in the girls' aisle with new content and expanded product lines.

And the wider industry has equal faith in the property, naming "DC Super Hero Girls" as the Best Character/Toy Brand and the Best Toys/Games/Novelties/Role-Play range for its Mattel action figures at the International Licensing Industry Merchandisers' Association's 2017 awards (which took place at Licensing Expo in Las Vegas, Nev.), as well as awarding it a TOTY in the action figure category.

Consumers also agree. According to NPD, as the "DC Super Hero Girls" action dolls have been among the top brands at retail.

Lifford also reminds us that horror and is a mainstay of the Warner Bros. portfolio.

"We believe we can super-serve our fans. Horror is more relevant than ever, and we own both new and classic IP that has rich storytelling, from *The Shining* to *Nightmare on Elm Street*, *Friday the 13th*, *IT*, *The Conjuring*, that creates opportunities to extend the brands with unique fan experiences

off the screen," she says.

From family-friendly properties such as "Scooby-Doo" to soft scares like *Beetlejuice*, *Gremlins* and *Goonies* and true horror films including *The Exorcist* and *IT*, WBCP is continuing its push into the arena with more products, apparel and collaborations.

"Our partnership with WBCP hit a milestone in 2017—25-years of working together on more than 10,000 SKUs for dozens of Warner Bros. properties," says Howard Beige, executive vice president, Rubie's Costume Co. "Rubie's builds on that relationship every day of the year to launch successful products in both the toy and Halloween departments in mass market as well as in more than 20,000 doors in specialty markets."

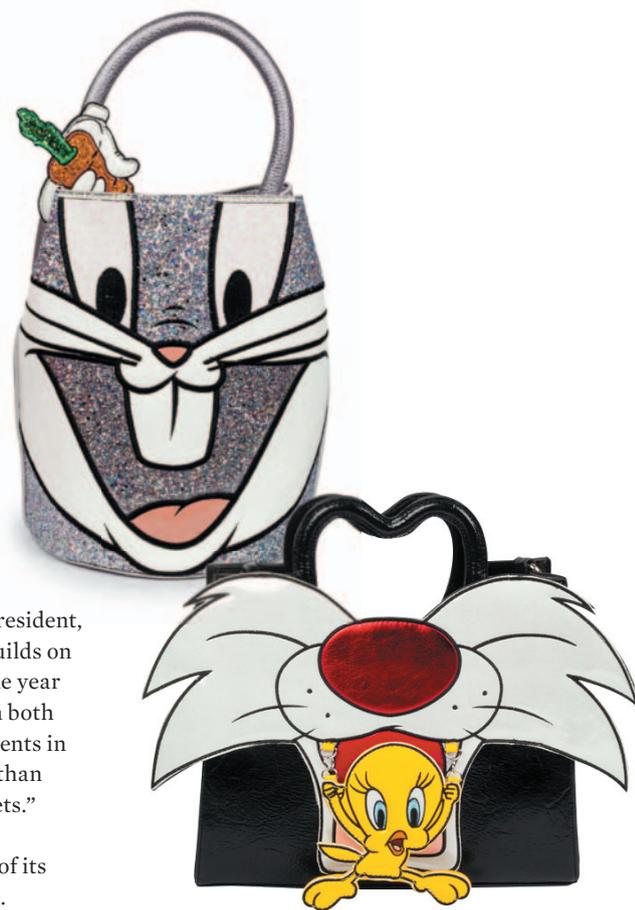
Fashion collaborations are a major play for WBCP across all of its properties, including animation.

Says Lifford: "We know that 'Looney Tunes' and 'The Flintstones' are really trending. We are seeing the ultimate pop-culture moment where everyone from high-end designers and fine-art artists to influencers and Millennial fans are creating their own inspired looks based on our characters.

This momentum is a great indicator of how the business is going to move forward."

"Looney Tunes" leads the studio's animation franchise portfolio, pushing the envelope with humor and even being featured in high-end fashion collaborations with the likes of Bobby Abley, Jeremy Scott and Balenciaga. Hanna-Barbera animation will also be a continued emphasis for WBCP, including "Scooby-Doo," "Tom and Jerry" and "The Flintstones," as they get global promotional opportunities and programs.

"Animation is the reason I came to this company," says Lifford. "There's this reignition taking place inside our organization that the entire company is engaged in, and I'm really excited about the opportunities and the strategy that we'll begin to reveal as the year starts to unfold." ©





This year's Toy Fair, hosted by the Toy Association, will tease a host of new games and merchandise from some of the world's top brands that kids will sure to be clamoring for.

by **BARBARA SAX**

**L**icensing has long fueled the toy category, and this year's Toy Fair, taking place Feb. 17-20 at the Jacob Javits Convention Center in New York City, will be no exception.

"We see licensing as responsible for about 30 percent of toy sales year-over-year. It's a driving force for a lot of toy creation," says Adrienne Appell, a spokesperson for

The Toy Association, the organization behind the event.

"Licenses are an important contributor to the toy business. In order to have a balanced portfolio, we focus on making sure we have a good mix of licenses that appeal to a vast audience of kids around the world," says Tara Hefter, senior vice president, global licensing, Jakks Pacific.

According to Hefter, Jakks Pacific will unveil several new master toy licenses tied to beloved entertainment properties such as Disney-Pixar's *The Incredibles 2*, Disney's *Fancy Nancy* and Dentsu Entertainment's "Mega Man."

"We'll also display other licenses including 'Daniel Tiger'; DC; Disney Princess; Warner Bros.' *Harry Potter*; Marvel's *Black Panther*; and Nickelodeon's 'Shimmer & Shine,' Slime and 'Sunny Day,'" says Hefter.

While brands tied to television and movie IPs remain a staple of the category, Appell says homegrown IPs are becoming a bigger part of the market. "Paw Patrol" and Shopkins are just two examples of wildly successful IPs developed in-house that flipped the traditional model.

"It's an interesting evolution of the licensing model with toy companies developing and marketing their own entertainment brands—Hasbro is now making movies," says Appell. "Fingerlings could be its own license. When you see how Hatchimals and Shopkins have grown, it's easy to see how Fingerlings could be the latest iteration of that trend."

Spin Master, the company behind Hatchimals, was recently named the new worldwide master toy partner for the Monster Jam motorsports brand and will build on its current roster of toys, which includes play sets, ride-ons and wooden vehicles inspired by the lineup of monster trucks such as Grave Digger, Max-D, Megalodon, Monster Mutt and El Toro Loco.

"Licenses, from gaming to content, are a good



part of our business," says Gerhard Runken, vice president, marketing and brand strategy, Wicked Cool Toys. "Properties like 'Skylanders' and 'Overwatch' have taken off like wildfire and opened up different partnerships that haven't been available in the past."

According to Runken, Wicked Cool has found opportunities to partner with immersive properties to offer kids new ways to interact with brands. Now, Wicked Cool is taking on Pokémon as the global master toy partner, and is betting big on the IP with new products and packaging.

"Pokémon is a global phenomenon that is engaging fans across many platforms including collectibles, triple A titles, mobile titles, events, series and consumer products," says Runken. "From a licensing perspective, the immersive Pokémon characters are definitely not a hard sell for us."

To give the brand a refresh, Wicked Cool Toys re-engineered the toy collection's look from the ground up.





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## THIS YEAR'S BUZZ: COLLECTIBLES, BLIND BAGS, INTERACTIVE AND OTHER POPULAR TOYS

The collectibles craze is hotter than ever as consumers are continuing to be enthralled with blind bags and unboxing videos.

"Collectibles are huge, as are blind bags and the reveal. The obsession with unboxing is having a huge influence on the toy aisle, with the act of removing the toy from a blind bag is as exciting as the toy itself," says Appell. "Last year, one of the hardest toys to find were L.O.L. Surprise! dolls, and the way that blind bags have taken hold will continue in 2018."

"I don't see [the collectibles] trend slowing down in any way," says Gerhard Runken, vice president, marketing and brand strategy, Wicked Cool Toys. "Collectibles, fidget spinners, trading cards ... they all have a social or status aspect that allows kids to play together and share. Any time you add these attributes to a toy, it has a better chance of connecting."

Wicked Cool Toys recently created a line of Cabbage Patch collectibles, and is currently working with the Cabbage Patch team on a collection of 120 small figures/play sets for blind containers.

Funko has also added three new blind box product lines since 2015—My Moji, Pint Size Heroes and the brand-new Mystery Mini Plushies.

"Mystery Minis, which are sold individually in a blind box, appeal to a broad array of fans across consumer demographic groups—men, women,

boys and girls—due to their 'treasure hunt' appeal," says Mark Robben, director of marketing, Funko. "Our blind box figure properties have nearly doubled to 120 over the past two years."

Naz Amarchi-Cuevas, head of licensing, SYBO Games, echos: "Mini-collectibles continue to lead the way with brands like L.O.L. Surprise!, Hatchimals and Fingerlings adding a bit of interactive fun into the mix."

Interactive and engaging play is another key trend in the toy category.

"Engaging play moves products beyond static action figures and toys to bring in social play or dual-play patterns to the digital function," says Runken. "Adding battle functions that work with another person or a reactionary feature when you play with a friend really enhances a toy."

Squishy toys are also still delighting kids today. "Squishy toys continue to be one of the hottest trends going into 2018," says Tara Hefter, senior vice president, global licensing, Jakks Pacific.

To build on that trend, Jakks is launching new waves of its Squish-Dee-Lish property plus new jumbo versions. The toy company is also adding new licenses including Disney's Tsum Tsum and the World of Nintendo to the Squish-Dee-Lish brand.

Learn more about the collectibles craze in this issue of *License Global* on page 52.

"We gave Pokémon an iconic, beautiful band packaging look designed to capture attention. When consumers go down the toy aisle, they'll see something different they haven't seen before."

Meanwhile,

"Paw Patrol," "Peppa Pig" and "PJ Masks" all continue to be hot preschool licenses. New products featuring Entertainment One's "Peppa Pig" include a "Peppa Pig" fly wheels junior cruiser from Jakks Pacific; a "Peppa Pig" family car, featuring LED headlights and realistic car sounds, from Rollplay; and the Summer Fun "Peppa"-inspired 12-inch girls' bicycle with two-tone glitter paint finish from Kent. Jazwares will also be showing new "Peppa Pig" products, including the transforming camper van.

Entertainment One's "PJ Masks" property will also appear on a number of new toys featured at Toy Fair, among them a collection of play mats from TCG, including a 6-piece tile gelli mat and immersive play deluxe play set megamat; "PJ Masks" Super Catboy learning watch from VTech, which



features the voices of the “PJ Masks” characters; and “PJ Masks” Romeo’s Lab play set from Just Play, which comes with one 3-inch Romeo figure, a Romeo’s robot figure and three bonus tools.

Jazwares is placing continued emphasis on licensed ranges in 2018.

“Licenses are paramount to Jazwares,” says Laura Zebersky, chief commercial officer, Jazwares. “Our goal is to ensure that we’re creating toy experiences and reaching consumers via every touchpoint, from digital to physical. To illustrate the importance, we have earned year-over-year growth by collaborating with some of the biggest global licensors such as Entertainment One, Hasbro, Microsoft and Roblox, to name a few. With our creative approach to brands, we build on the licensor’s vision and guidelines to help translate the emotional connection to physical product.”

The company will also have on highlight items that support Sony’s latest feature in the *Hotel Transylvania* franchise, and has recently launched its Roblox Celebrity line of gender neutral toys exclusively with Walmart. Jazwares will also debut Feisty Pets, which are fluffy, plush pets with unique expressions.

“We specialize in developing exclusive programs, whether it’s a premiere product, exclusive offer, brand, promotion, first-to-market plan or any other unique experience,” says Zebersky. “A company our size and with our distribution globally gives us a strong advantage.”

Genius Brands International has signed Mattel as the master toy partner for its new preschool brand “Rainbow Rangers,” a CGI-animated series that follows the adventures of seven magical girls who are Earth’s first responders, protecting the people, animals, resources and natural beauty of our world. The series is currently in production for its first two seasons and is scheduled to launch on Nick Jr. in the U.S. this fall.

Genius Brands is also rolling out its first product line for its Netflix Original preschool series “Llama Llama.” The initial product assortment will include animatronic plush from Cuddle Barn and Jack-in-the-Box, as well as plush and puppets from Kids Preferred.

New properties are sharing the spotlight with classic IPs, which are getting a boost from Millennial parents who want to share the brands they loved as children with their own kids.

“Millennials make up majority of new parents, and while they are obsessed with technology, as parents, they are drawn to toys and brands they recognize from their childhood—classics like *Toy Story*, Rubik’s Cube, Polly Pocket, Strawberry Shortcake and ‘Pac-Man,’” says Appell.

Interest in classic board games has also spiked recently. This increased interest has contributed double-digit growth in the board game category in the last two years, according to the NPD Group, and multi-generational appeal as well as a variety of games—from cooperative to licensed—keep the category fresh. Social media posts from “laugh out loud” or “gross out” board game moments have also inspired more people to play, and licensing opportunities are abounding in the category.

“My daughter got a Shopkins game and she was very into it,

but even for adults, IPs such as ‘Game of Thrones’ are very popular,” says Appell. “When there’s a frenzy over games, licensing can be a big part of the category.” ©



# REVITALIZING AÉROPOSTALE

Aéropostale is refocusing its efforts and experiencing a revitalized push at retail.

by ERICA GARBER

**A**lthough many brick-and-mortar retailers are struggling to adapt to a new era of retail realities, one chain is making a strong comeback—Aéropostale.

In May 2016, the teen retailer joined a rising number of mall-based chains (including QuikSilver, PacSun and Wet Seal) that were struggling to evolve with new consumer shopping habits, and filed for bankruptcy, shuttering more than 150 stores in an effort to optimize its retail footprint and achieve long-term financial stability.

However, in September of the same year, Aéropostale's story began to look up after it was purchased for \$243.3 million by a business conglomerate that included Authentic Brands Group, General Growth Properties and Simon Property Group.

"The year we filed for bankruptcy, we were still generating more than \$1 billion worth of sales in the U.S., so it was apparent that consumers were still voting for Aéropostale every day," says Ken Ohashi, executive vice president, lifestyle, ABG, who worked with the Aéropostale brand before it was acquired. "We never thought that the brand lost resonance with the consumer. Structurally, we knew that we had to really look at the business model, and that's one of the things that happened in 2016 when



**KEN OHASHI**  
*executive vice president, lifestyle,  
Authentic Brands Group*

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Authentic Brands Group, in conjunction with two of the largest landlords in the country, Simon Properties and General Growth Properties, bought Aéropostale.”

Four months following the acquisition, ABG re-opened more than 500 Aéropostale retail locations, marking the beginning of a new growth trajectory.

Today, the teen retailer claims

516 U.S. stores in 45 states, as well as 427 international locations in 17 countries and 36 territories worldwide.

“We say locations because we have what I call ‘anchor stores’ in key department stores such as Liverpool,” says Ohashi. “The shop-in-shops are about 2,000-square-foot, so it’s practically the volume of a freestanding store. We also run a pretty robust e-commerce platform.”

Another way that ABG is working to revitalize the Aéropostale brand is through a “think global, act local” approach that includes regional experiential activations, an updated marketing strategy and integrations with other lifestyle brands within ABG’s portfolio.

“The whole strategy with ‘think global, act local’ is to operate an incredibly transportable model,” says Ohashi. “We’re in 17 countries worldwide, so when you go to a store in India, Greece or the Philippines, there should be a level of consistency around the brand.

“At the same time, there are a lot of things that we’ve done to grow the business in local markets,” continues Ohashi. “For example, in India, we’ve thrived under our partnership with the Arvind Group through local production, store sizing, retail distribution and marketing.”

Another element of the “think global, act local” strategy is merging ABG’s celebrity brands with Aéropostale. The chain did an Icons collection that featured Marilyn Monroe, Elvis Presley, Muhammad Ali and Julius “Dr. J” Erving, each of which are owned and managed by ABG. The line was even expanded into the retailer’s Mexico-based locations due to its success and consumer demand, according to Ohashi.

In addition to ABG’s celebrity brands, Aéropostale also welcomed the Tapout brand into its stores, and is planning to launch a range of Above the Rim active apparel and Airwalk-branded t-shirts, shorts and swimwear for men this spring.

Aéropostale has also relied on social media influencers to help support its brand. In 2013, the chain was the first retailer to do a collaboration with a social media star, Bethany Mota. The \$80 million program, which became a model for future influencer initiatives, included a variety of apparel, accessories and jewelry designed by Mota to reflect her own style, as well as that of her fans. It’s a model that ABG has continued to evolve.

Recently, Aéropostale teamed up with Hannah Stocking, a globally recognized YouTube star with more than 2.3 million subscribers, to build on its influencer partnerships. Stocking supported the brand’s back-to-school denim campaign, which was viewed by 5.5 million people, according to Ohashi.

The teen retailer has also partnered with American singer Sabrina Carpenter to serve as a brand ambassador and face of its upcoming spring campaign.

ABG has also developed other ways to further restructure the teen retailer.

“First and foremost, we’ve got to talk product, product, product. It’s not about branding. We could put the best branding and marketing behind Aéropostale, but if we don’t have the right product in the store, it doesn’t matter,” says Ohashi. “We hired a new president and chief merchandising officer, Natalie Levy, and head of design, Amie Goeller, who re-invigorated the product in terms of silhouette, color and fabrication.

“An additional structural change was the overall marketing and making sure that we collaborate with the right partners, including the companies that we work with, not just influencers,” continues Ohashi. “Last year, we did a huge collaboration with Spotify and a number of influencers. We also did a number of successful activations with HerCampus Tours and Coachella Music Festival, one of the largest music festivals in the world.”

In addition to its recent collaborations and activations, Aéropostale has inked several licensing deals in order to focus on its core business and restructuring. However, the retailer is very careful about which categories it licenses out, says Ohashi.

In November, ABG secured a multi-year license agreement with IHL Group to produce intimate apparel for the teen retailer. The intimates’ collection will include bras, sports bras, bodysuits, panties and more, and is expected to launch during the 2018 holiday season.

ABG also partnered with Children’s Apparel Network to take over its robust children’s apparel business, as well as Mesa for fragrance. The teen retailer has also teamed up with Allure, a division of Marchon, to develop optical frames and sunglasses.

Although Aéropostale filed for bankruptcy and was acquired by ABG in 2016, the teen retailer finished 2017 profitably, according to Ohashi. The company reported an EBITDA just north of \$20 million, as well as \$1 billion in sales.

As for what’s on deck for the retailer? Ohashi comments: “We’re continuing to develop the product assortment. We’re also looking at e-commerce, so really developing and growing that platform for the next generation of teens.”

Ohashi will also offer an unprecedented inside look at how ABG has revived the Aéropostale brand during his presentation “The Remaking of a Traditional Retailer: Aéropostale” at the NYC Summit: The Business of Brand Licensing, taking place Feb. 20. For more information, or to register for the event, visit [NYCLicensingSummit.com](http://NYCLicensingSummit.com). ©





**No.1  
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# No.1 Brand Robocar POLI

Robocar POLI consolidates its position as a No.1 pre-school brand in Russia. According to NPD's research on 2016 Russian pre-school toy market, Robocar POLI has ranked No.1 from the pre-school category. POLI has been also selected as 2nd fastest growing brand.

## TOP Selling Brand in Italy

Since its launching in February in Italy, POLI is getting more and more market share in the Italian market. In 4 months, Robocar POLI toys became one of the top selling toys.



## Everywhere with Robocar Poli

### Collaboration of No.1 Book Store Chain and No. 1 Kids Character in Korea

Kyobo bookstore, the No. 1 book store chain in Korea and Robocar POLI collaborated for a promotion. This is a promotion that people bring used books to earn points. All of the books that are bought by the people will be donated to local organizations.

### 5th ROBOCAR POLI Theme Park in China

5th Robocar POLI theme park opened at Shuion plaza, Wuhan, China. The park in Wuhan is the two-story and the largest among the Robocar POLI theme parks which are located in Beijing, Chongqing, Nanjing, and Guanzhou. The unique attractions, themed with the characters and elements of Robocar POLI series are finally unveiled in this park.



### Second ROBOCAR POLI restaurant Open in Taiwan

The second Robocar POLI restaurant opened on 8th June at Global Mall in Taiwan. Robocar POLI restaurant now provides new menus and many events such as VIP day and birthday party. Robocar POLI became a place where children can experience a popular character brand, Robocar POLI.



# Traffic Safety with Poli

## Robocar Poli had 2nd FIFA Road Show with Hyundai Russia

Starting from April of 2017 in Sochi, Robocar POLI Rescue Team toured the major cities in Russia for Traffic Safety Campaign including Novgorod, Volgograd, and Ekaterinburg until the end of May, 2017.



4 Major City Tours in Russia



## Robocar POLI Traffic Safety Playpark Opens

The third place to educate traffic safety to children with Robocar POLI, 'Robocar POLI Traffic Safety Playpark', starting this year, was developed by cooperation with Hyundai Motors, Citizen's Coalitions for Safety and ROI VISUAL. As a real life version of traffic safety education, the playpark expects more than 30,000 visitors each year.



# Hot Items

## Sunkist POLI, 20% increase in sales only within 2 months after its launching

Only 2 months after its launching with 4 kinds of pet beverage, 'Sunkist POLI' has received tremendous love from children. Comparing to sales of Disney Sunkist product last year, sales of 'Sunkist POLI' showed an increase about 20%.



## 100% Pure Fruit Juice in Taiwan

100% pure orange and apple juice were launched. Kuang Chuan Daily, the most well-known beverage company in Taiwan, launched Robocar POLI fruit juice as its first licensing product.



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# 'SUNNY DAY' IS RISING



**JENNIFER CAVEZA,**  
*senior vice president, toys,*  
*Nickelodeon*

Nickelodeon is building excitement for its latest hit preschool program, "Sunny Day," and is gearing up to launch a robust consumer products program, beginning with toys.

by **BARBARA SAX**

**N**ickelodeon Viacom Consumer Products and master toy licensee Fisher-Price will debut a toy collection built around the animated preschool hit "Sunny Day" at Toy Fair, taking place Feb. 17-20 in New York.

The series follows 10-year-old hairstyling maven Sunny, who uses creative problem-solving skills to tackle dilemmas that arise in her seaside town of Friendly Falls while she runs her salon-on-the-go, the Glam Van. The series' characters aim to celebrate individuality and

self-expression, while the show highlights leadership, innovative thinking and teamwork.

Nickelodeon is also picking up season two of the bubbly show from Silvergate Media, which launched this summer.

"Through our study called 'The Story of Me,' we found



that kids today are interested in being entrepreneurs—69 percent of kids from the study said, ‘I really want to start my own business someday,’ so a show about a young entrepreneur really resonates with our audience,” says Jennifer Caveza, senior vice president, toys, Nickelodeon. “Sunny is also a great role model for young girls—she’s a natural leader and she encourages others to express their individuality and embrace their uniqueness.”

The toy line was developed in collaboration with Mattel’s Fisher-Price brand and aims to bring the show’s DNA to girls in a way that allows them to “play out” the show and “be” Sunny.

“‘Sunny Day’ toys empower preschool girls to embrace fearless self-expression and display creativity through hair styling and features aspirational hair styling play and attainable creativity—all closely tied to show content,” says Caveza.

The collection includes “Sunny Day” collectibles, role play and plush toys and will launch with a first-to-market program exclusively at Walmart in May, followed by a mass launch in August.

“We’ve been excited about this property since the first moment we saw it,” says Anne Marie Kehoe, vice president, toys, Walmart. “‘Sunny Day’ has broad appeal, inspiring entrepreneurship and

creativity for any kiddo that walks down our toy aisles. We are excited to be the first in market to carry this Nickelodeon property and anticipate it being a hit.”

Highlights from the collection include a “Sunny Day” pop-in-style doll assortment of 6-inch posable figures, along with three hair accessories for customized looks. A “Sunny Day” brush and style doll assortment includes a posable 11-inch character dolls with knee articulation, styling brush and two-in-one hair charm that children can also wear as a bracelet.

The line also features “friendship play” with “wear and share” elements, like bracelets that double as hair ornaments for the dolls and magical, open-ended hair transformations, such as the Sunny Magic Color Change doll. The doll, which debuts this fall, lets kids change Sunny’s hair color between eight different colors using a special tool.

A “Sunny Day” bath doll assortment, featuring 6-inch Sunny, Blair and Rox dolls with long ponytails just waiting to be brushed, braided and styled, brings fun to the tub, and the collection’s plush element includes a 6-inch plush version of Sunny’s BFFF (best dog friend forever) dressed in his signature blue bow tie.

Role play is also a centerpiece of the toy range from Nick and includes Sunny’s accessory apron, which has four styling tools that feature 15 sounds, songs and phrases. Little future salon owners can also create their own personal looks using the four pretend styling tools to clip, curl, straighten and brush.

Finally, the “Sunny Day” Glam Vanity, a fully-stocked styling playset on wheels, includes a posable 11-inch Sunny doll that fits inside, styling chair, adjustable mirror, hair brush, pretend scissors and removable hair dryer accessory.

Nickelodeon will also keep the spotlight on this new property with a “Sunny Day Glam Van Tour,” an interactive experience immersing fans in the world of “Sunny Day” that includes styling stations, photo opportunities, DIY activities, content screenings and a product showcase. The tour kicks off in May at the Bentonville Film Festival and will be hitting select Walmart stores across the country this summer.

“We are always looking for new ways to connect our audience with the characters they love and expand Nickelodeon’s global footprint, and an experiential on-the-ground event like the ‘Glam Van Tour’ is a great example,” says Caveza. “We’re excited to have a custom-built vehicle inspired by Sunny’s actual Glam Van in the show that kids can interact with in-person for free beginning this summer.” ©



# Collect Them All: An In-Depth Look at COLLECTIBLES

From Funko to Fingerlings, collectibles are everywhere these days, and consumers of all ages are not only looking to expand their collections through figures, but with licensed merchandise.

by ERICA GARBER

When Shopkins first launched in 2014, the collectibles market exploded. Since then, a variety of collectible brands have been introduced to the market including L.O.L. Surprise! (MGA Entertainment), Hatchimals (Spin Master) and Fingerlings (WowWee), among many others hoping to make their mark on a variety of ages groups throughout the world.

And as the collectibles market is continuing to grow and extend its reach, these popular toys are also expanding beyond the toy aisle and into a number of consumer products categories spanning apparel, publishing, homewares, stationery and more.

“Collectibles have a broad appeal across a wide age group,” says Dianne Bellchambers, head of licensing, Moose Toys, maker of Shopkins. “They also are very affordable and suitable for an occasional treat or reward due to their low price point. The depth of characters to collect and the uniqueness of each design makes them highly engaging and desirable.” Entertainment brands, such as Nickelodeon’s “Shimmer and Shine,” are finding advantages to the collectibles space and are looking to the segment to further





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develop their storylines and broaden their reach.

All in all, collectibles are booming.

“Collectibles are an interesting sector as they open up the idea of year-round seasonality to the toy world,” says Richard Yanofsky, president and co-founder, WowWee. “It’s an opportunity to connect with consumers on a more consistent, frequent basis, at a low price point of entry.

“There is a sense of communication with collectibles that children exhibit at younger ages that continues into adulthood,” continues Yanofsky. “Consumers are always looking to expand their collection, and as demand endures, rarer figures almost become their own currency of sorts. Collectibles become show-and-tell conversations and playground trade resources.”

During the first half of 2017, the collectibles market experienced double-digit growth worldwide, according to The NPD Group. Global sales of collectibles increased by 15 percent and now account for close to 10 percent of dollar sales in the entire toy market.

In the U.S., the collectibles market saw dollar sales up 22 percent in the first half of 2017, with the back half of 2017 growing to 5 percent. Overall, full-year growth came in at 11 percent for 2017. The NPD Group also notes that the sales of blind packs, a subset of collectibles, grew by 48 percent in the first half of the year.

“When you’re competing against double-digit growth year-over-year, it’s difficult to maintain that over a long period of time,” says Juli Lennett, U.S. toys industry advisor, The NPD Group. “There are some exceptions to that, but eventually the market just happens to slow down because you reach that

tipping point. In some weeks, we’ve seen declines in collectibles and there’s no reason to be concerned about that. I think we’ll continue to see innovation in the collectibles market and I fully expect we’ll continue to see the category evolve in the coming year.”

Possibly one of the most notable collectible brands that has moved into additional categories is Moose Toys’ Shopkins. The grocery-themed brand began licensing in 2015 and to-date has racked up more than \$1 billion in licensed retail sales.

Shopkins’ consumer products program initially began with publishing, games, puzzles and plush, and today boasts more than 220 licensees worldwide. Several notable partners include McDonald’s for Happy Meals, Koba for “Shopkins Live!” and Skechers for footwear. Moose Toys also hosted a pop-up café in New York City last summer that included Shopkins-themed macarons, close-up looks at new play sets, a manicure station, photo opportunities and more.

In addition to its robust lineup of licensees, Moose Toys has also secured 15 agents to further develop the brand around the world including The Licensing Shop in North America, Bulldog Licensing in the U.K., La Panaderia for Latin America and Merchantwise for Australia and New Zealand.

Looking ahead, Moose Toys will continue to focus on the Shopkins brand (including the recently launched Cutie Cars) as well as its new brand Pikmi Pops, which will roll out a consumer products program later in the year.

MGA Entertainment has also made waves in the collectibles market with its L.O.L. Surprise! dolls and scented collectibles brand Num Noms, both of which have been expanded into a variety of consumer product categories including apparel, accessories, home décor, stationery, furnishings, publishing and more.

Like many collectible brands, L.O.L. Surprise! and Num Noms have grown internationally and currently span the U.S., U.K., Latin America, Australia and Canada. MGA Entertainment has also partnered with agents such as The Point.1888, Segal Licensing and Haven to further extend each brands’ licensing program internationally.

Although L.O.L. Surprise! and Num Noms are hot properties for MGA Entertainment, the company is also looking to expand its reach with a robust assortment of boys’ products.

“We look forward to expanding our collectibles with new boy properties,” says Isaac Larian, chief executive officer, MGA Entertainment. “Along with new brands, this expansion will include the release of additional characters for our Crate Creatures Surprise.”

A new brand that’s appeared in the collectibles segment is WowWee’s Fingerlings, an interactive



toy that clings to children's fingers and can go wherever they go. The brand launched late last year and was touted as one of the holiday season's hottest toys, having appeared on multiple holiday toy lists from retailers such as Toys 'R' Us and Walmart.

Although the brand is still relatively new, WowWee has already tapped Striker Entertainment to represent it for licensing worldwide. Fingerlings is currently seeking partners in categories including games, puzzles, bedding, sleepwear, plush, stationery, novelty, crafts, publishing, seasonal ornaments and room décor; however, no licensees have been disclosed.

"Our approach to licensing is more about the continuity of the brand, and as such, we are carefully scrutinizing what categories make sense," says Yanofsky. "I would estimate that the program will encompass about 15-20 licensees this year and will be limited to partners that share the same vision of the brand."

Spin Master's Hatchimals toy brand, which already has a blind pack appeal, also launched a range of collectibles, dubbed "colleggtibles," last year. The range allows Hatchimal fans to experience more

than 70 new species, each belonging to one of 13 different families, and collect them.

Although many people think of children's toys when it comes to the collectibles market, there are other major players in the industry. One of the most prominent collectible brands out there today is Funko, which has created a robust assortment of stylized figures based on properties ranging from Disney to "World of Warcraft," the National Football League and beyond.

In 2017 alone, Funko added varied licenses from Bob Ross, RuPaul, James Bond, Mad Max, "Trollhunters," Pez and the new video game "Cuphead," among others. The company is also set to unveil a host of new licensing agreements in and around New York Toy Fair this month, according to Mark Robben, director of marketing, Funko.

Funko also has plans to further expand its current product offerings.

"We plan to continue to add new product categories, lines and brands," says Robben. "As an

example, we are expanding our blind box offerings and we recently completed the acquisition of Loungefly in order to expand and diversify the product offerings in our accessories category."

Alternatively, entertainment brands are also trying to reap the benefits of the collectibles market. For example, Nickelodeon noticed how strongly younger consumers were responding to Shopkins and realized there was a white space for its animated series "Shimmer and Shine" to enter into the category.

From there, the brand's master toy licensee, Fisher-Price, helped launch the first wave of stylized figurines, dubbed Teenie Genies, in spring 2017. The initial launch included more than 130 figures and, by spring 2019, Nickelodeon expects to have 500 plus Teenie Genies to collect. While the Teenie Genies range has been in the market for almost a year, the collectible brand accounts for roughly 25 percent of the overall "Shimmer and Shine" licensing business, according to Jennifer Caveza, senior vice president, toys, Nickelodeon.

In addition to appealing to young fans interested in collectible figures, Teenie Genies also allows Nickelodeon to extend its IP with a host

of characters and for the company to promote not only collectability, but storytelling play.

Genius Brands International is also making a move into the collectibles category with its animated series "Rainbow Rangers." The company is currently working with the series' master toy licensee, Mattel, to develop a range of collectible dolls, which are slated to hit retail in 2019 and following the series' premiere this fall.

And while a collectibles program appears to be a solid win for licensors, executing a robust program is no small feat.

"The collectibles market is fast-moving and a high-volume driver," says Bellchambers. "It definitely gives a great insight into what kids are chasing given most price points for collectibles are accessible with pocket money. Due to the high number of units sold, a strong collectible requires significant investment and newness and more regular intervals than other categories in toys to be successful." ©



# MARKET REPORT:

# JAPAN

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

by KIRSTY BIRKETT-STUBBS

**I**t may be smaller than a lot of places, but Japan is definitely mighty. After all, it is the third largest economy in the world with a nominal GDP of \$4.94 trillion in 2016, according to the World Bank.

Most people associate Japan with high-tech innovation and cutting-edge developments. It is home to a wealth of top international household names, from car companies Honda, Nissan, Toyota and Lexus, to giant conglomerates like Sony and Hitachi and electronic firms such as Nintendo, Canon and Panasonic.

The country also has a rich cultural heritage, which it still retains much of today. From its beautiful temples, to samurais and geishas, Japan is associated with many iconic images and traditions, which inform everything in the region, from art to film. Traditional hobbies such as calligraphy, flower arranging and tea ceremonies are also still practiced today.

## Market Overview

More than 127 million people live in Japan making it the 11th largest population in the world. And as with many developed countries, Japan is facing the challenge of an aging population. In 2016, 34.6 million people were identified as aged (65-years-old or older), which is 27.5 percent of the total population, a record high. Part of this is due to longer life expectancy and because the overall population has been in decline since 2005.

As a result of the aging population, there are fewer people of a working age. This is one of the reasons that unemployment in the country fell to its lowest rate in 21 years in 2017. And the upside of having more people in the workplace? More people with disposable income.

This is important because Japan's economy has been sluggish for more than two decades following

the collapse of the "bubble economy" of the 1980's. Economic recovery has been slow ever since, which prompted Prime Minister Shinzo Abe to introduce a new "three-arrow" economic policy in 2013.

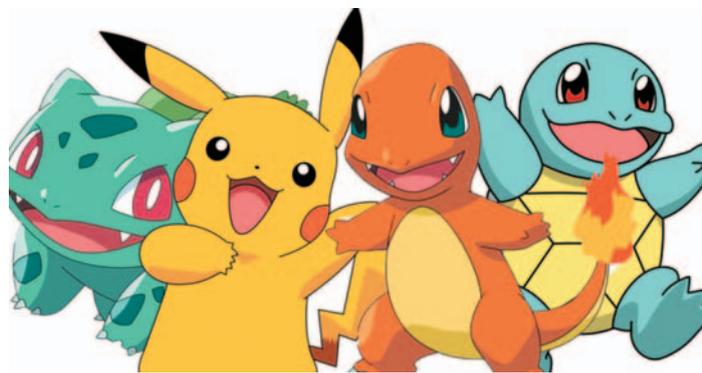
Known as "Abenomics," the first arrow is monetary easing to combat deflation, the second sees increased spending to stimulate economic demand and the third is structural reforms to promote private investment. The policy seems to be working slowly as GDP rose for the seventh consecutive quarter last year with an annualized increase of 2.5 percent in Q3 2017—the longest growth streak since the mid-1990's.

However, in the same quarter, household spending decreased 0.5 percent, which was largely attributed to weak growth in pay-up—just 0.6 percent year-on-year. With Abe re-elected for a third term last October, the political landscape, and the Abenomics policies, looks to remain stable. As such, confidence in the continued positive growth of the market is good.

All of this has had an impact on the Japanese shopper, who has long had a reputation for being



**SHINZO ABE**  
prime minister, Japan





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discerning and happy to pay more for quality products. Historically, Japan's shoppers have also been less prone to taking risks, preferring to buy from brands they trust, which often means home-grown companies versus overseas contenders.

The luxury sector has been particularly strong, with high-end department stores making up a big part of Japan's retail heritage. With these come top-notch customer service and the type of big name brands that shoppers are willing to pay to own.

But this, too, is shifting. Japanese shoppers still expect a high standard of customer service, but they're also increasingly seeking more value, including an openness to buy from discount retailers. Local casual clothing brands like Uniqlo have helped encourage a shift from the more expensive luxury names, as well.

Much of this value-oriented thinking stems from the economic downturn two decades ago. Coupled with the

weaker economy, Japanese shoppers have adopted a more frugal mindset, which is proving difficult to change.

### Licensing in Japan

With sales of \$12.5 billion in 2016, Japan is the third largest market for licensed merchandise in the world, according to LIMA's Annual Global Licensing Industry Survey 2017, an increase from \$11.9 billion in 2015. Overall, Japan accounted for 4.8 percent of total global licensed merchandise sales. As a whole, royalties from licensed products in Japan were \$656 million, or 4.7 percent, of all royalties worldwide.

Licensing in Japan covers a broad spectrum of different product types, with toys (\$2.9 billion) as the biggest single category in 2016. This was followed by apparel (\$2.1 billion), fashion accessories (\$1.2 billion) and software, video games and apps (\$1.2 billion). Only the U.S. generates more revenue from licensing for video games, which demonstrates the popularity of this sector in Japan.

A whopping \$9.3 billion, or three quarters, of licensing revenue in Japan comes from character and entertainment properties. This is a substantial jump up from 2015, where character licensing generated \$7.7 billion in sales. Corporate and fashion were the next largest areas for licensing at \$1.3 billion and \$1 billion, respectively, in 2016.

"The uniqueness of the Japan licensing market is the higher share of characters (60 percent of the market volume) as compared to other countries," confirms Nobuaki Nito, general manager, Licensing Expo Japan, which takes place April 25-27 in Tokyo. "There are two types of characters: one is media characters such as Pokémon, Dragon Ball and Doraemon, and the other is non-media characters such as Hello Kitty and San-X characters."

Home-grown character properties still dominate in the market, but international brands such as Disney, Peanuts, *The Hungry Caterpillar* and *Paddington* are also popular.

In fact, Tokyo Disneyland was the first Disney-branded theme park to be built outside the U.S. A second Disney park opened in the country in 2001, and there are now plans to start construction on a third, tailored specifically towards Japanese culture, with a target opening of 2025.

Equally, many major Japanese characters are also hugely popular across the world. This is reflected in *License Global's* Top 150 Global Licensors report, which featured a number of Japanese brands including Hello Kitty creators Sanrio at No. 12 and The Pokémon Company at No. 19.

Character licensing has penetrated almost every product category, although toys is still the single largest with 29.2 percent of revenues. Apparel and software are also prime categories for character licensing

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at 13.9 percent and 11.1 percent, respectively.

Despite the huge dominance of character licensing in Japan, it only represented 7.8 percent of all retail sales for entertainment and character licensed merchandise worldwide in 2016. This still generated a healthy \$472 million in royalties, according to LIMA.

### Unique Market

One of the more unique factors in the Japanese market is the multi-audience appeal of character licensed products. Many of the best-loved characters are linked to other forms of media such as film, TV and print, which are targeted at children. But for a lot of characters there is also an adult audience, particularly among women.

“Another unique quality of the Japan market is that character licensed products are popular not only with kids, but also adult women. There are a lot of unique presentations and collaborations between characters and other fashion or lifestyle brands,” notes Nito.

This gives licensors far more scope to strike deals for licensed merchandise as different products suit different audiences, such as homewares for adults and toys for children. Even within one product category there can be various opportunities, such as child-friendly toys and higher-end collectible figures for adults.

This dual-appeal is one reason why recognizable characters, with deep heritage, are so successful. Adults often look favorably on the characters that they grew up with and may actively seek out products featuring those characters. They, in turn, introduce them to their own children, which creates a continuous cycle of fans.

Another popular trend in Japan is small, limited runs of products. Licensors can capitalize on this to create hype and demand. Consumers are increasingly looking for distinct experiences and something that everyone else

doesn't have. A limited run of a licensed product can impart that special feeling and it can spur customers to keep coming back to buy other limited runs.

Gacha, or small toys packaged in plastic capsules dispensed from vending machines, is another peculiarity of Japanese retail. The toys are usually themed around a certain character or franchise, and each range contains a number of different designs. As customers cannot see which design they are getting, many will buy multiple gacha in order to try and collect the whole series. Most characters lend themselves to gacha, but all sorts of brands can be licensed for them.

The model has been extended to other countries such as the U.S., U.K. and beyond vending machines into blind-box collector sets of figures from popular franchises. Gacha has even spawned online and mobile games, showing how lucrative it can be for licensors.

### E-commerce

There's also been a shift in terms of retail channels. In 2016, 81 percent of all licensed product purchases were made in brick-and-mortar stores, with the remaining 19 percent online—a 7 percent



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increase over 2015. This is indicative of the Japanese retail market as a whole, with e-commerce on the rise.

Statista reports that retail e-commerce sales were \$89.55 billion in 2016, making Japan the fourth largest market for e-commerce. According to the statistics company, more than 92 percent of the population has access to the Internet, but only 69 percent were shopping online in 2016, which means that there's still huge potential for e-commerce's reach to grow further.

Statista also estimates that close to 59 percent of Japan's population accessed the Internet through smartphones in 2016. This highlights the impact that shopping via mobile, or "m-commerce," will have on Japanese retail habits in the coming years.

Despite the opportunities offered by e-commerce, the importance of physical retail still can't be underestimated given that most licensed product sales still happen in stores.

Department stores, or *depatto*, have been a big part of the retail landscape in Japan since as far back as 1673. Mitsukoshi, Takashimaya, Daimaru and Isetan are among the country's largest department store chains, operating multiple sites throughout Japan. At the other end of the scale, Japan's independent

character-heavy stores are still a vital part of the mix.

Shop-in-shop concessions have also become a staple of the country's physical retail. This is both a way to counter some of the challenges facing brick-and-mortar retail by removing the need for a retailer to rent a whole store, and a way to keep things fresh by bringing in new retail experiences.

### Influencing Factors

In 2020, Tokyo will host the Olympic Games. This means that millions of eyes will be focused on Japan in the coming years. In particular, it may present a number of new licensing opportunities around sports and apparel, not least in the form of official Olympic merchandise. However, the Olympics may spark a general upswing in the sale of Japanese brands by bringing them to the wider world's attention.

Tourism is already on the rise, with 2017 seeing a record 28.69 million visitors, and the government is working hard to attract even more with international campaigns. The aim is to have 40 million tourists by 2020, which means even more people who may be looking to buy a slice of Japanese culture. And that can only be good news for licensors. ©

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## Lights Up

The preschool property continues to lay the foundation for success with new consumer products and the introduction of live shows and events.  
by AMBER ALSTON

**A**nimaccord Studio's preschool property "Masha and the Bear" is entering its 10th year with a number of partnerships and distribution deals that have cemented the series' reputation as a global powerhouse. As a result of an informed media strategy, the animated series has established a strong global presence that has opened the door for a host of licensed consumer products and live events.

First released in 2009, "Masha and the Bear" found its audience through YouTube. To date, the series boasts more than 30 billion views worldwide, and the episode "Recipe for Disaster" was ranked No. 7 on the top 10 most watched YouTube videos of all time, according to YouTube statistics.

"Because of the international success of 'Masha and the Bear,' Animaccord decided to release local cartoon channels," says Dmitry Loveyko, general director, Animaccord. "Now the platform hosts 13 official 'Masha and the Bear' YouTube channels in English, Russian, Italian, Spanish, French, German, Ukrainian, Portuguese, Arabic, Turkish, Hindi, Hebrew and Chinese languages."

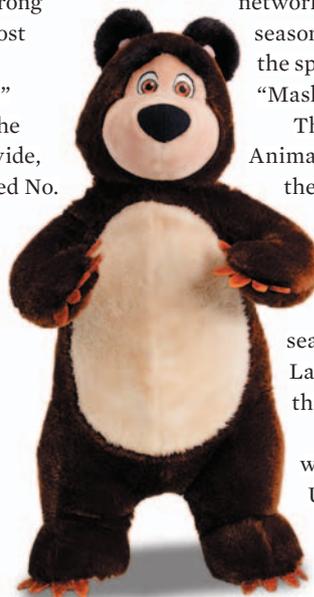
The series' success online and on television

led to a number of distribution deals around the world.

In 2017, Animaccord, in collaboration with The Ink Group, signed a deal that brought the show's first and second seasons to Clan TV in Spain. Viacom18 Media, one of India's fastest growing entertainment networks, introduced the first and second season of "Masha and the Bear," as well as the spin-offs "Masha's Spooky Stories" and "Masha's Tales," to the territory last May.

The potential for the show further led Animaccord to partner with Nick Jr. to release the first season on its network in November 2017. In Canada, Treehouse released the series' third season in November, while Turner Broadcasting System signed a deal for the show's third season to launch on Cartoon Network Latin America. Rai Yo-Yo also picked up the property's third season in Italy.

This year, Animaccord, in partnership with The Ink Group, has inked deals with Universal Kids and Tiny Pop to bring "Masha and the Bear" to free TV channels in the U.S. and U.K., respectively.





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“Oleg Kuzovkov created a new, unique and amusing duo of a child and adult,” says Loveyko, who also credited the show’s success to its hyperreal CGI animation and popular music. “The content

contains minimum dialogue, where only Masha speaks—like ‘Tom and Jerry’—which is understandable for every age category and language.

“The songs that are used in the cartoon gain almost the same popularity as the series itself,” continues Loveyko. “Today, kids sing the songs from ‘Masha and the Bear’ everywhere—in kindergartens, primary schools, children’s musical groups, etc., and we can say that some of the separate videos from the series with the songs have gained more than 100 million views each.”

The brand’s robust media presence has created a large demand for licensed consumer products, says Animaccord. As of today, Animaccord boasts a portfolio that includes partners like Spin Master, Ferrero, Danone, Simba Dickie Group, Ravensburger, Egmont, Little Brown and Company and more.

A variety of new products are expected to hit the market this year including an exclusive collection of licensed Kinder Surprise Maxi Eggs by Ferrero in Europe and Kinder Surprise Eggs in Mexico, Central America, Europe and CIS.

“The [brand’s] spin-off properties are also universal and suitable for the various product categories,” says Anastasia Anisimova, product development manager, Animaccord. “There will be books of different formats such as activity books, exercise books, colorings and more. I believe we can expect educational games and toys in the spin-off designs, as well.”

According to Vladimir Valiev, deputy head of licensing, Animaccord, the company “made and defined a particular focus on partnerships with leading (national) free TV channels” while designing the brand’s licensing strategy. Through this strategy, the company has been able to distribute its content to a larger audience, evaluate the brand’s performance and consumer tendencies through market research, collaborate with global players for consumer products and secure distribution channels with top retailers. The company has also been able to support brand

loyalty by managing multiple business-to-consumer activities with costumed characters and the like.

In Mexico, Walmart arranged a retail promotion with branded “Masha” displays in 250 stores; while in France, toy store JouéClub hosted a series of meet-and-greet events with giveaways and a chance to win tickets to Los Production’s “Masha and the Bear Live” show. In the U.K., The Entertainer created a branded window display in more than 70 stores, which was further supported with brand displays, meet-and-greet events, costumed characters and a competition with prizes. And in Germany, Muller ran a summer campaign that included meet-and-greets and giveaways at 30 select stores. Toys ‘R’ Us Germany also launched a promotional campaign last fall that saw meet-and-greets, costumed characters, sweepstakes with giveaways and point-of-sale displays in 10 stores. The country’s largest online store, Mytoys.de, also launched the official “Masha and the Bear” shop-in-shop in December.

In 2017, the animated program took a step outside of its traditional format in the form of live shows and live events that further developed the series’ storylines and introduced new characters and branding opportunities. Last summer, Exim Entertainment brought the live show “Rescue at the Circus!” to Latin America, where it will be performed through 2019. Tycoon Guru also debuted the “Masha and the Bear” live show to audiences in Mexico, Central America and the Caribbean in July. In the EMEA region, Los Production opened the holiday season with a live show that ranked No. 2 at the box office, behind Disney’s “Ice Show,” and in Italy, EMA Eventi brought a live show based on the spin-off series “Masha’s Tales” to the territory.

“Masha and the Bear’s” aggressive licensing, marketing, distribution and event campaigns have positioned the property for success in North America. New to the region, Animaccord currently has a distribution deal with Netflix and Universal Kids, and hopes to bring its live events to national stages within the year.

“I believe that the American audience is specific because people in the U.S. are given the whole and diverse world of both locally produced American animation as well as international ones,” says Loveyko. “However, we can also take a great advantage of that. I have previously mentioned that ‘Masha and the Bear’ is a universal show—it is not tied to a local topic. On the contrary, it reflects the basic repeatable situations that are the same for all nations.” ©





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IN RETAIL SALES IN 2017



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For more information on licensing opportunities, please contact Scott Halpern: [scott.halpern@wwe.com](mailto:scott.halpern@wwe.com) / 203.353.5062

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# Harry Potter™

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