

The \$100 Million+ Entertainment/Character Licensed Properties Revealed

NEW YORK: Sept, 6, 2011 — Thirty-seven Entertainment/Character properties had retail sales of licensed merchandise of \$100 million or more in the U.S. and Canada in 2010, according to THE LICENSING LETTER's first-ever estimates of sales by property for this sector. Disney Princess, Star Wars, and Winnie The Pooh surpassed the \$1 billion mark.

"The \$100 million-plus licensed properties underscore the critical importance of sequential exposure across multiple media," says TLL publisher Ira Mayer. "Most have film, TV, and strong publishing programs. The list also emphasizes the importance of longevity in reaching such high sales levels: Only a handful of the properties are 10 years old or less (the newest being The Biggest Loser); the others are all 25 years old or more."

Analyzing the rankings:

- The 37 properties in aggregate were responsible for \$15.3 billion in retail sales of licensed merchandise last year in the U.S. and Canada.
- Nine properties (24%) are from the Disney stable, including two from Marvel; but these nine properties account for 41% of retail sales of licensed merchandise among the \$100 million-plus group.
- The top three properties (Princess at \$1.7 billion, Star Wars at \$1.4 billion, and Pooh at \$1.1 billion, accounted for 27% of sales across the \$100 million-plus group.
- Average retail sales of licensed merchandise for these top 37 properties was \$413 million in the U.S. and Canada in 2010.

Methodology

Some of our estimates differ significantly from publicly-reported numbers from the companies that own these properties. This stems from the fact that THE LICENSING LETTER exclusively reports on consumer products that are licensed to third parties for manufacture and distribution, and where the manufacturer is paying a royalty on goods sold.

TLL does not tally sales products created through in-house divisions of the property owners, rather than through licensing agreements with third parties, which are often sold at theme parks or company-owned stores (e.g., Mickey Mouse plush sold as Disneyworld or Disney Stores); so-called "content licensing" including mobile apps, web entertainment, and home video; or non-retail products such as events, theme park attractions, cruises, and similar. Nor does our tally include "core" merchandise manufactured and sold by the property owner (e.g., Barbie dolls or Transformers toys).

ESTIMATED RETAIL SALES OF TOP 10 LICENSED ENTERTAINMENT/CHARACTER PROPERTIES, U.S. AND CANADA, 2010

Dollars in millions

1.	Disney Princess	Disney	\$1,725
2.	Star Wars & The Clone Wars	LucasFilm	\$1,415
3.	Pooh	Disney	\$1,100
4.	Toy Story	Disney/Pixar	\$915
5.	Cars	Disney/Pixar	\$810
6.	Hello Kitty	Sanrio	\$750
7.	Mickey & Friends	Disney	\$725
8.	Peanuts	Peanuts Worldwide/Iconix	\$660
9.	Sesame Street	Sesame Workshop	\$525
10.	WWE	WWE	\$520

Source: THE LICENSING LETTER; www.epmcom.com/TLL

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About THE LICENSING LETTER

The Licensing Letter delivers retail sales data, news of deals, contact information, and trend analysis to owners of intellectual property, their agents, retailers, and the manufacturers who market licensed merchandise. The twice-monthly newsletter is published by EPM Communications, Inc., which also publishes "The Licensing Letter Royalty Trends Report," "The Licensing Letter Databook," a licensing business directory, and more.