

GERMANY

Germany is one of the biggest markets in Europe in terms of licensed properties with a collection of home grown and international brands succeeding in the market.

On the following pages, we feature articles from the viewpoint of the children's market and from the non-media-based properties, as well as information and news from various leading German companies.

The Kids' Marketplace - Trends in Germany

By Axel Dammler, iconkids & youth international research GmbH

Yes, the licensing market in Germany shines yellow, too! The Minions are the most popular property by far across the kids market (and most likely in older age groups as well). But when taking a closer look at the data we collected during recent months in our Kids License monitor study, some interesting trends emerge that not only summarise the German market, but also show some more basic developments within the marketplace.

1. Minions – it's not just the yellow!

What is most fascinating about the Minion's success is the breadth of their fan base: All children ranked them 1st or 2nd in our study with the exception of the youngest girls. Humor is the common denominator, of course, but there is much more to the Minions: In an environment that is highly predictable in terms of the used design codes, the Minions break all the rules because they look so different – you just can't open a drawer and put them next to similar characters. The last character that was as outstanding was in fact SpongeBob. So it's no surprise the Minions started as sidekicks in Despicable Me (the same applies to the Penguins from Madagascar). Pro-

duction companies can be much more daring with these characters than with the lead characters that need to be mainstreamed.

The really interesting year for the Minions will be 2016, though: Sooner or later, the Minions will face the normal life cycle of a license and move towards a more specific and limited core target group. In most cases this



means the target group gets younger (see SpongeBob!), but it can also pitch older (see The Simpsons). So we can expect the Minions to claim their territory over the next year - but it will most likely be smaller than last year.

2. Dragons and Ice Age – story value beats design

Dragons and Ice Age are examples of highly regarded franchises that also work across the target groups in the kids market. It's not the visual design and artwork that makes them stand out from the crowd, but the quality of the stories and the appeal of the characters. It's about who they are and what they do, not what they look like. Ice Age shows how sustainable this special quality can be: Without any new content, it's still loved by German

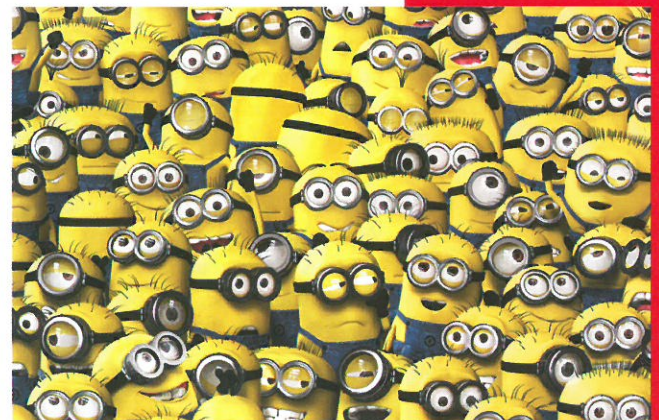
children. But here's a hidden trap and a major watch-out for the licensing business: Merchandise products must leverage the quality of their property. For Dragons and Ice Age this means that only those products that build on the story value of the property can be successful. So it's no surprise that role play toys for Dragons work well in Germany. However, product categories that have to rely on the look of the characters or logo will find it much harder to succeed. After all, who wants an Ice Age t-shirt these days?

3. Tom & Jerry, Lion King, Mickey Mouse – don't forget the Classics

It is understandable that marketers always look for the next big thing. Let's face it, who wants to ride an old or even dead horse. So I dare say hardly anyone had Tom & Jerry on their bucket list for 2015. But that was a huge mistake.

And what was the simple explanation behind this phenomenon? Tom & Jerry was aired in the early evening prime time on Super RTL, one of Germany's most successful kids TV channels, and TV can even make old stuff a hyped-brand in the schoolyards.

Lion King and Mickey Mouse are different stories. These two don't have the coolness of the funny and rule breaking Tom & Jerry, but they are nevertheless relevant. Not for the schoolyard, but for home products. So sometimes the old classics have more potential than newer licenses. They



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Ranking based on the results of the Kids Licenses Monitor, Waves 2015 II / III / IV with a total n = 1,200 children aged 4 – 12 years. Top box rating "Like a lot" on a 5-point-scale

Top Licenses in Germany

	Total	Boys			Girls		
		4-6 years	7-9 years	10-12 years	4-6 years	7-9 years	10-12 years
1.	Minions	Minions	Minions	Minions	Frozen	Frozen	Minions
2.	Ice Age	Cars	Ice Age	Ice Age	Disney Princess	Minions	Ice Age
3.	Tom & Jerry	Tom & Jerry	Star Wars	Star Wars	Barbie	Ice Age	Frozen
4.	Minions	Ice Age	Tom & Jerry	Penguins of Madagascar	Minnie Mouse	LEGO Friends	Top Model
5.	Dragons	Spider-Man	Spider-Man	Mr. Bean	Prinzessin Lillifee	Minnie Mouse	Tom & Jerry
6.	The Lion King	Bob the Builder	Dragons	Spider-Man	Hello Kitty	Disney Fairies	Ostwind
7.	Shaun the Sheep	Shaun the Sheep	Star Wars	SpongeBob SquarePants	Mickey Mouse	Tom & Jerry	Minions
8.	Mickey Mouse	The Lion King	Minions	The Simpsons	Disney Fairies	Barbie	Diary of a Wimpy Kid
9.	Frozen	Hot Wheels	LEGO Ninjago	Dragons	Fillys	Mia and Me	Dragons
10.	Penguins of Madagascar	Dragons	Teen. Mutant Ninja Turtles	Transformers	Mia and Me	Hello Kitty	Disney Princess

can build on a solid fan base and will be relevant for longer.

4. Frozen – welcome to the gender debate

Minions, Dragons, Ice Age, Tom & Jerry are great unisex success stories – but they are the exception to the rule. The

sent a new generation of female role models. These princesses are not the helpless victims that need to be saved by Prince Charming, but they take fate into their own hands. In fact, their princes are more a burden than a real support in their quest.

So gender preferences will always be an issue in terms of the selection of licenses and children will go for the design codes that are currently in vogue. But this does not automatically mean that this takes children back to the role models of the 50's.

5. Prinzessin Lillifee, Topmodel & Ostwind – is Germany still so different?

You'll probably have heard of the lovely Princess Lillifee, the sympathetic little fairy princess. But unless you are German, you might not know Ostwind – a tweenager franchise based on two movies about the friendship between a rebellious girls and a horse. Together with design-driven Topmodel these two are actually the only truly German franchises in the Top Ten lists. It is no big surprise that all three are for girls: These properties were developed for the domestic market, and with a smaller budget. All other top licenses are big, and as such excite boys even more than girls.

So Germany is losing more and more

of its uniqueness in terms of the international market because blockbuster IPs occupy center stage now. Nevertheless, there are German properties coming through all the time, even though they are not represented in the Top Ten. And how this works is demonstrated nicely by Prinzessin Lillifee, Topmodel & Ostwind: All three originate from books or other publishing products.

So Germany is still different: The country's print market can still create licensing heroes at least within specific segments.

The Tag der Lizenzen, the most important Spring event, brings together licensees, manufacturers and retail traders in Cologne on 14 April. Organised by LIMA Germany, this is the 14th time that licensors and agencies will present their upcoming highlights. In the course of the day, the industry will present the best from all areas of licensing, eg TV, movie and sporting rights, in 15 and 25 minute time slots. In 2014 and 2015 around 600 visitors in attended this event, which is regularly sold out.

This year has as always a busy program.

From 8:00am to 6:00pm speakers will present their plans and introduce their latest properties. The agenda is determined neither by rank nor by agency size. The order of presentations is changed each year, resulting in equally interesting presentations from the morning – starting with the hot sports topic of Wrestling – up to late afternoon.

Valuable information is guaranteed during the whole course of the day. Studio 100 Media will 'complete' the Tag der Lizenzen for the first time in 2016. Among the other speakers in 2016 licensors and agencies such as Bavaria, Burda Media, Celebrities, CPLG, DFB Wirtschaftsdienste, Dracco, Euro Lizenzen, Super RTL, RTL Interactive, RTL II, ProSiebenSat 1 Licensing, g.l.a.m., Hasbro, Mattel, TLC, Team! Licensing, Mattel, TLC, WDR, ZDF Enterprises and Disney.

For further information please visit <http://www.lima-verband.de/>



Top ten list shows a clear differentiation between properties for boys and properties for girls, and in most cases gender specific IPs beat unisex ones because they are much closer to the needs and wants of the children.

What is interesting about Frozen and previous Disney princesses like Rapunzel and Merida is not their girlishness, though. These ladies excite girls because they are princesses with beautiful dresses, but they also repre-