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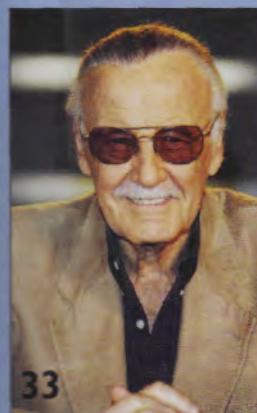
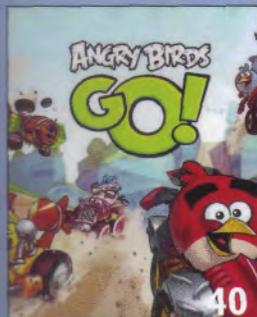
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can still win without media support! But don't get blinded or fooled too easily by the prospect of opportunities. It is worth taking a look at local heroes. New graphic styles still find it hard to succeed in Germany: Manga is a minority thing and even the more contemporary "weird" animation styles such as Phineas & Ferb, Cosmo & Wanda, or even The Simpsons or SpongeBob are not yet common ground. Mothers would not like these styles "in their face" on the bedding of their son when waking him up

in the morning! So bear in mind: The stranger the look, the older the target market group!

This leads to the final – and potentially most important – lesson with regards to the German market: You can be anything, but always be patient! Germany is a slow moving market, and even huge success stories such as Bob the Builder, SpongeBob, or Star Wars needed two years before they finally worked. The most frequent and most lamentable mistake I have seen being made by companies from overseas

was that they pulled the plug a little too early – sometimes right at the magic tipping point, when a license was about to fly!

So if you take away just one message from this article, then let it be this one: Yes, Germany is in fact a difficult market, but when licenses fail, they fail for a good reason from the German perspective! Germany can make you rich, but to get there, you need to embrace the market rather than force your established routines and patterns on it. If you need help: Just ask!

SUPERHEROES IN GERMANY

By Philippe Guinaudeau, Kidz Global
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Who are the super-heroes of German children? Comic characters? Movie characters? Cartoon characters? Toy characters?

In fact, this world is highly structured and codified, both for children and their parents. Kidz Global's last wave of the Kids Observer survey – tracking attitudes and behaviors of more than 10,000 kids and 10,000 mums – tells us more about this universe.

Who are they?

According to a recent survey from Kidz Global, the "traditional" super-heroes are the same around the world. And, specifically in Germany they are Spider-Man, Superman and Batman. All 3 characters account for 47% of all characters mentioned by German

kids aged 0-14 years. Note that boys tend more towards these characters (57%) while girls, although embracing these universes (they account for 37% of those mentioned), also have more diversification in their choices with Barbie, Filly, Asterix, Harry Potter or Supergirl.

Heroes change as children get older: Indeed, younger children place SpongeBob, Fireman Sam or Winnie the Pooh as their favorite ones. However, this decreases as kids get older.

Amongst these Super-Heroes, SpongeBob is a special case. German kids of all ages up to 14 consider the character as their favorite cartoon character - ahead of both Mickey Mouse and Winnie the Pooh.

Heroes are not gender specific with traditional boy superheroes popular with girls through all age groups; e.g. Spider-Man represents 19% of characters cited by both boys and girls 0-14. So, what makes a super-hero?

There are two sets of definitions - the view of the child and the view of the parents.

With regards to kids, generally, both boys and girls agree on the key elements a hero needs. Both believe that they need to have gadgets as the #1 thing and a team to support them. Both are in agreement that their heroes don't need to have extra super powers or be brave, although girls want their heroes to be strong, fast and able to fight.

Having separate lives is also important to being a hero, particularly for boys, while girls would prefer if they were risk takers rather than having a secret life. Super heroes don't need to have

extra super powers or be brave. Heroes are people with skills and tools that are real and achievable.

Parents also believe today's heroes need to be emotional with human qualities and values, but at the same time have strong personalities. For 58% of German parents, super-heroes have a strong personality first - brave, relentless, determined ... these are their most important attributes, followed by human qualities of kindness, generosity, solidarity, justice, and sacrifice. These are all stronger amongst German parents than elsewhere in Europe.

What do parents think about super-heroes?

Heroes come and go, depending on trends (72%). Parents are extremely aware of the marketing source of super-heroes: their popularity is driven by marketing, TV and movies (37% of the parents believe this!). That's the main reason some German parents do not want their children to have heroes.

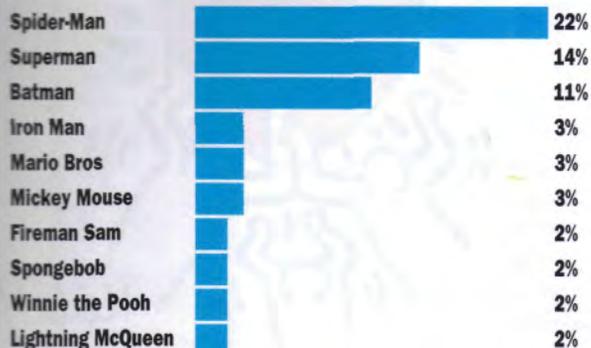
But most parents (60%) consider that super-heroes develop their children's imagination. As they grow, heroes help to develop a child's confidence and become role models for them, particularly those that they can relate to. Heroes play a steady helping role across all age groups.

Finally, 47% of parents enjoy passing down their own heroes to their kids, particularly when they are young. However, while some parents are unsure, some parents realise that kids need to have their own heroes and that their childhood heroes may not be relevant anymore.

Who are your favorite Super-Heroes?

July 2013 (N=1,320)

German children aged 0 - 14 years



LIZENZEN JETZT
VON V.I.P. AG

The new comic film trilogy by Stan Lee, the creator of Spiderman, X-Men, Hulk, Iron-Man, Thor, Avengers, Daredevil a.o.

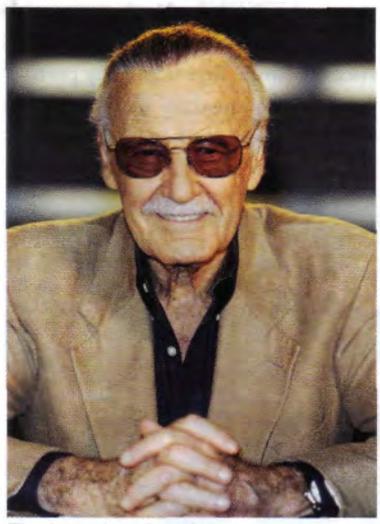


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MARKET HIGHLIGHTS

VIP Entertainment & Merchandising, based in Hamburg, report that Stan Lee's Mighty7, the new comic film trilogy by the 90-year old creator of super heroes like Spiderman, Hulk, X-Men, Thor, Iron-Man, The Avengers and Captain America, was the highlight of their presence at the recent LIMA Licensing Market in Munich. The Hamburg-based licensing experts,



The legendary Stan Lee

that boost a track record of well over 30 years, have partnered with comic veteran Stan Lee, who believes that his newest creations will also become his most successful, and are basing this belief on past licensing successes like Star Wars, James Bond, Indiana Jones, Terminator or Rambo. The first film release is set for this summer, the other two half-yearly thereafter. Numerous social media and content marketing activities are planned to heighten the hype and to fill the gap in between the films and comics. Other properties licensed by VIP Entertainment & Merchandising include The Royal Touch - based on Carolyn Robb, the former Executive Chef to Prince Charles and Lady Diana. The recent 'coffee table' cook book by Carolyn Robb which contains a lot of anecdotes from her time at the palaces received wide TV and press coverage, much to the delight of its publishers (Callwey Verlag). The program will include a broad base of products such as china, crystal and silver together with numerous food products such as jam, spices and herbs as well as kitch-

en accessories. As Michael A Lou, President of VIP explained, "Carolyn Robb is something like Jamie Oliver but for the discerning. It licenses the grace, style and class that were extended by the royal family to its guests from around the world." On the art side, VIP is licensing Salvador Dali's artwork from his masterpiece "El triomf l el Rodoli de la Gala l en Dalí, together with Sid Maurer's Celebrity Icons and the Queen of Art Déco, Tamara de Lempicka. Maurer, a former colleague of Andy Warhol, has portrayed over 150 celebrities in his very own modern, colourful and easily recognizable art which sells not only well on "traditional" merchandising products but is also popular in terms of advertising and promotion. Michael A Lou is also delighted at the ongoing retro trend that is boosting demand for Beatles licenses whilst sales of Beatles and Yellow Submarine products continue to rise.





On the different note, V.I.P.'s new charity property Deutscher Tierschutzbund (Europe's largest association for the protection of nature and animals with some 800,000 members) is highly ambitious and is being carefully developed to meet the high standards of the

association. GeraNova Verlagshaus already publishes the official member magazine for DTSchB.

TSB was established 1881 and is nowadays the central association of 700 German local animal societies with some 500 shelters; a charity that is funded exclusively by donations and dues from its members. It was awarded the "DZI Spenden-Siegel" (Donation Seal) by the German Central Institute for Social Issues (DZI) which is considered the highest certification for controlling the proper use of funds by Charities.

Recently DTSchB has introduced a "Animal Protection Label" for hogs and poultry that is being licensed to companies that obey the laws and the standards developed by DTSchB in cooperation with the University of Goettingen with respect to animal-friendly livestock raising that is rigorously controlled by independent specialists. Hence, the DTSchB Logo is widely recognized as a quality seal and perfectly suits licensing on a larger variety of products for pets, horses and others; ranging from pet food and accessories over riding equipment to anything else for the well-being of animals. Even animal and pet insurance.

"2014 will see even more brands entering the licensing scene," explained Michael Lou, who is a pioneer of brand licensing, going back to the end of the 1980s when he licensed Febergé for Unilever and the German Railway Company (Deutsche Bundesbahn). "We will concentrate on our current high profile brands and may even add some further brands that we will select carefully. At the same time, we will continue to push our few entertainment properties."

M4e AG report that the Mia and Me television rights have recently been sold into the UK and USA with broadcasting scheduled to begin shortly. Season 2 is in production and planned for delivery at the end of the year.



In Germany the property continues to be highly successful with more than 400,000 DVDs sold to date, along with 750,000 books and 250,000 audio play CDs. In addition, around 80,000 - 95,000 copies of the fan magazine are sold each month. Mattel will launch new product early this year and, together with Simba Toys, Ravensburger, Schmidt Spiele, Clementoni, John Toys, ASS Altenburger, BOT International and Best-Lock will debut products at Nuremberg. On the publishing side, spin-

off novels by Egmont have launched as a bridge between season one and two with three novels currently in the market and Panini will launch a new sticker collection and album this Spring. On the promotional side, a retail promotion with Deichmann Shoes is scheduled for April supported by television advertising and a QSR promotion, with books, will be part of McDonald's Happy Meals in summer. The Mia and Me online shop is now operational and a number of gaming apps are in production and will launch during this year. M4e are also marketing B-Daman, the new boys' action property from the makers of Beyblade. The television series B-Daman Crossfire currently airs through YEP! on

ProSieben Maxx each weekend and season two is now in production. Hasbro is the master toy partner. M4e holds licensing and merchandising rights for German speaking territories and Benelux and are currently developing an extensive program.

A new property for M4e is YooHoo & Friends, the successful collector's brand from Aurora World. The collectible figurines and plush toys have sold more than 22 million units since their launch in 2007 and in 2013, the property was the subject of a pan-European McDonald's Happy Meal promotion

covering 6,000 restaurants in 40 territories. Simba Toys is the toy partner for German speaking territories and playsets, games and puzzles are also produced by Simba Dickie Group who

