Awareness and Popularity of Brands/Properties Among Kids

USA - July 2014

Study Commissioned by International Licensing Industry Merchandisers' Association
Prepared by Kidz Global
Data Collected through the BrandTrends Research Project
The Market

Favorite Licenses by Age Group
- Infants: 0-2 Years Old
- Preschoolers: 3-6 Years Old
- Children: 7-9 Years Old
- Tweens and Young Teens: 10-14 Years Old

Favorite Licenses by Category
- Cartoons
- TV Shows
- Movies
- Books
- Toys
- Video-Games/Apps
- Music
- Fashion
- Celebrities
- Sport Personalities
- Sport Events

About BrandTrends
The US market has the highest number of licenses but remains even more concentrated on a small number in the 1st quartile, with high levels of allegiance in fast food, drinks and cartoons.

**Mentions of Licenses**

<table>
<thead>
<tr>
<th>Category</th>
<th>% Mentions</th>
<th>% Licenses</th>
<th># Licenses</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Quartile</td>
<td>24.76%</td>
<td>1%</td>
<td>16</td>
</tr>
<tr>
<td>2nd Quartile</td>
<td>25.13%</td>
<td>2%</td>
<td>39</td>
</tr>
<tr>
<td>3rd Quartile</td>
<td>25.01%</td>
<td>6%</td>
<td>110</td>
</tr>
<tr>
<td>4th Quartile</td>
<td>25.08%</td>
<td>9%</td>
<td>1614</td>
</tr>
<tr>
<td>Total</td>
<td>100.00%</td>
<td>100%</td>
<td>1779</td>
</tr>
</tbody>
</table>

**Key Facts**

- 16 licenses make up the first quartile of mentions, but represent just 1% of the licenses which exist in market, indicating a high level of concentration around a small number of licenses in an otherwise busy and complex market.
- The US market has a high number of licenses, over 1,779, with 91% of them in the 4th quartile. Beyond the 1st and 2nd quartile, the market is highly fragmented.

**Top 10 Most Mentioned Licenses**

<table>
<thead>
<tr>
<th>License</th>
<th>% Mentions</th>
<th>1st Fav.</th>
<th>2nd &amp; 3rd Fav.</th>
</tr>
</thead>
<tbody>
<tr>
<td>McDonald's</td>
<td>2.9%</td>
<td>1.3%</td>
<td>2.4%</td>
</tr>
<tr>
<td>Spongebob Squarepants</td>
<td>2.3%</td>
<td>1.2%</td>
<td>1.9%</td>
</tr>
<tr>
<td>Spider-Man</td>
<td>1.0%</td>
<td>1.0%</td>
<td>1.7%</td>
</tr>
<tr>
<td>Lego</td>
<td>0.9%</td>
<td>1.5%</td>
<td>1.5%</td>
</tr>
<tr>
<td>Batman</td>
<td>1.9%</td>
<td>1.5%</td>
<td>1.5%</td>
</tr>
<tr>
<td>Frozen</td>
<td>1.4%</td>
<td>1.2%</td>
<td>1.2%</td>
</tr>
<tr>
<td>Nike</td>
<td>1.1%</td>
<td>1.2%</td>
<td>1.2%</td>
</tr>
<tr>
<td>Burger King</td>
<td>0.8%</td>
<td>1.2%</td>
<td>2.2%</td>
</tr>
<tr>
<td>Mickey Mouse</td>
<td>0.5%</td>
<td>1.2%</td>
<td>2.2%</td>
</tr>
<tr>
<td>Disney Princess</td>
<td>0.4%</td>
<td>1.2%</td>
<td>2.2%</td>
</tr>
</tbody>
</table>

**Licenses By Category**

- There are a high number of cartoon-related licenses with corresponding high volume of mentions per license.
- The US, in keeping with many developed world markets sees an increase in mentions per license in the drinks and fast food categories but conversely a dip in sport events or personalities. The drinks and fast food categories are dominated by McDonald's and Burger King, Coca Cola and Pepsi.
- Movies generate more mentions per license than TV shows, music substantially fewer, toys more than video games or books and celebrities very few at all. The higher the number of licenses and the lower the mentions per license, the more fragmented the market appears to be.

**Key Facts**

- McDonald's leads the pack in the US with a clear lead as 1st favorite and a narrower margin on total favorite.
- Spongebob, Spider-man, Mickey and Batman are all established properties, with Spongebob well on 1st favorite character (2nd overall), a strong achievement after over a decade since launch.
- New entrant, Frozen (6th), is still riding the crest of the wave since the movie release in cinemas and more recently on DVD.
- Toy brand Lego makes it on to the top 10.
Favorite Licenses

By Age Group
For infants 0-2, licenses featured in the top 10 originate predominantly from evergreen movie, TV shows or toys.

### Key Facts

- Mickey Mouse leads the top 10 for kids 0-2.
- 3 out of the top 10 licenses are Disney owned or acquired properties – Mickey, Frozen and Cars with 8.3% share, but the US market has less breadth of Disney properties than in many European countries where Winnie the Pooh also features.
- Peppa Pig is notable by its absence, with classic evergreen Sesame Street, Dora and Spongebob takings pole positions, 3rd, 4th, and 5th.
- McDonald’s enters the list at this young age right in the 2nd spot, between 2 character brands.
- The top 10 amount to 26% of all license mentions.
Kids 3-6 remain prominently aware of Disney licenses but a diverse range of licenses from toys, movies and ‘on the go’ food and drink emerge.

### Top 10 Most Mentioned Licenses Among Parents of Kids 3-6
(USA - % Mentions - July 2014)

- McDonald’s: 4.2%
- Frozen: 2.9%
- Spider-Man: 2.7%
- Spongebob Squarepants: 2.6%
- Lego: 2.3%
- Disney Princess: 2.2%
- Batman: 1.9%
- Dora the Explorer: 1.9%
- Barbie: 1.7%
- Disney: 1.5%

### Key Facts
- McDonald’s share of mentions has increased from infancy, taking 1st place.
- It is followed by recent release, Frozen, which has enjoyed considerable global success.
- Spider-Man and Spongebob compete for 3rd place, driven by boy preferences.
- 30% of the top 10 licenses are from Disney’s portfolio.
- Licenses which can be found in the toy aisle, whether originating from entertainment or brand, make up 90% of the top 10 licenses.
- The top 10 licenses make up 24% of all mentions by 3-6 year olds and are closely packed, indicating that kids in this age group have diverse tastes and a broad repertoire to choose from.
Kids 7-9 give greater prominence to McDonald’s and ‘on the go’ food and drink or fashion have made the impact that they do in other countries. The US top 10 remains at 70% entertainment or character led.

**Key Facts**

- Nevertheless McDonald’s retains its lead, with 3.9% share. Distancing 2nd brand SpongeBob (2.7%).
- Lego is not as prominent in the US for this age group.
- However the top 5 has changed minimally from ages 3-6 to 7-9. Spongebob, Lego and Spiderman remain in the top 5, swapping ranks,
- Minecraft enters the top 10.
- The top 10 licenses amount to 20.2% of all mentions.
Tweens and young teens gravitate towards fast, ‘on the go’ food and drinks, with Coca Cola, Gatorade and Wendy’s rising up the ranks, expand their movie interests into 12+ Harry Potter (now 10th), and fashion interests with Nike.

**Key Facts**

- McDonald’s has retained a place in the top 10 since infancy and in the top spot since kids were aged 3+.
- Spongebob, Spider-man and Batman have also held on to their user base, despite the arrival of ‘out of home’ influences.
- Harry Potter appears in the 10th position, intensifying with the movies as kids grow older, despite the fact that the last movie release was 4 years ago – a new generation in kids terms!
- The top 10 licenses represent just 17.3% of all mentions as kids preferences fragment across a wide range of choices and influences. It is surprising that their tastes in entertainment remain anchored in so few properties with the notable absence of The Simpsons and video game licenses.
Favorite Licenses
By Category
Key to success is not just how well kids know the license but how much kids love the license!

### Key Facts

- Preference for Spongebob is emphatic, although the license has not franchised across categories, entertainment, toys or music.
- 3 out of the 10 top cartoons sit in Disney’s portfolio, and 3 sit in Nickelodeon one. Disney has a stronger presence across genders in TV shows, due to the popularity and penetration of Disney channels and movies.
- Frozen tops the movie list, a recent release, whilst half the remaining movies are much older in market.
- The Harry Potter series spans movies and books, the only ‘older’ property in the top 10 lists to do so, joining younger licenses Dora, Curious George and Mickey Mouse.

#### Top 10 Most Mentioned Licenses By Category

**Cartoons**
- Spongebob Squarepants
- Mickey Mouse
- Dora the Explorer
- Tom & Jerry
- Scooby-Doo
- Sofia the First
- Doc McStuffins
- Bubble Guppies
- Paw Patrol
- Teenage Mutant Ninja Turtles

**TV Shows**
- Spongebob Squarepants
- Sam & Cat
- iCarly
- Sesame Street
- Dora the Explorer
- Doc McStuffins
- Sofia the First
- Mickey Mouse Clubhouse

**Movies**
- Frozen
- Cars the Movie
- Disney Princess
- Despicable Me
- Toy Story
- Finding Nemo
- Transformers
- Lego
- Avengers
- Harry Potter

**Books**
- Harry Potter
- Disney Princess
- Mickey Mouse
- Winnie the Pooh & Friends
- Curious George
- Sesame Street
- The Cat in the Hat
- Diary of a Wimpy Kid
- Hunger Games
- Thomas and Friends
The more opportunities to interact with a license the more it wins the hearts and minds of kids.

**Top 10 Most Mentioned Licenses By Category**
*(USA - % Mentions - July 2014)*

**Toys - Boys**
- Lego
- Hot Wheels
- Fisher Price
- NERF
- Mattel
- Disney
- Marvel
- Transformers
- Cars the Movie
- VTech

**Toys - Girls**
- Barbie
- Disney
- Fisher Price
- Lego
- Mattel
- Monster High
- My Little Pony
- Hello Kitty
- Leapfrog
- Disney Princess

**Video-Games/App**
- Minecraft
- Mario Bros
- Angry Birds
- Candy Crush
- Call of Duty
- Nintendo Wii
- Lego
- Temple Run
- Microsoft Xbox
- Skylanders

**Music**
- One Direction
- Katy Perry
- Justin Bieber
- Taylor Swift
- Ariana Grande
- Beyonce
- Selena Gomez
- Luke Bryan
- Miley Cyrus
- Bruno Mars

**Key Facts**
- Toys generally follow gender specific demarcation except for Lego which appears in the top 10 for boys and girls.
- 30% of boys top 10 toy licenses are character. 50% of girls top toy licenses are character based.
- Lego is the no.1 license for boys, Barbie the no.1 for girls. None of the licenses in either the boys or girls toy list are less than 3 years old, with the exception of Frozen.
- Games are more ‘social’ App driven than many European countries. There is a breadth of titles, such as Minecraft; and with older game – Call of Duty – reaching the top 10 due to its popularity amongst kids 10-14.
- 90% of music artists originate from the US, one from a movie (!).
Preferences for fashion brands, celebrities, sport events and sports personalities are US centric with global events - Olympics and FIFA World Cup - only 8th and 9th.

Top 10 Most Mentioned Licenses By Category (USA - % Mentions - July 2014)

**Fashion**
- Nike
- Justice
- Old Navy
- Carter’s
- Disney
- Aeropostale
- Adidas
- Gap
- Under Armour
- The Children’s Place

**Celebrities**
- Selena Gomez
- Ariana Grande
- Justin Bieber
- Miley Cyrus
- Katy Perry
- Taylor Swift
- Beyoncé
- One Direction
- Brad Pitt
- Tom Cruise

**Sport Personalities**
- LeBron James
- Michael Jordan
- Derek Jeter
- Kobe Bryant
- Tom Brady
- Kevin Durant
- Lionel Messi
- Peyton Manning
- David Ortiz
- Gabby Douglas

**Sport Events**
- Football
- Baseball
- Basketball
- Super Bowl
- FIFA World Cup
- Hockey
- World Series
- Olympic Games
- NBA
- Gymnastics

**Key Facts**
- There is little character branding prominent in fashion – only Disney.
- The list of fashion licenses is varied but predominantly ‘classically American’.
- 80% of the Top 10 celebrities are mostly singers while 20% are actors.
- Sports personalities are almost entirely American, the notable exception being Lionel Messi (a footballer!) and reflect a preference driven by greater awareness or viewing opportunities of Baseball, Basketball and Super Bowl.
Favorite Licenses

By Category
TV Shows
For infants, Sesame occupies a ‘special place’, in contrast to many other countries where it simply does not feature. It is followed by Spongebob and Mickey for boys, Sofia and Dora for girls. Doc McStuffins hold the leadership in girls.
For boys 3-6, Sesame drops out of boys’ top 10 list, replaced by SpongBob, even more centered on Disney (50%) than girls. SpongeBob has climbed to 1st place for boys, 4th for girls and will remain a top 6 favorite up to age 14.
For kids 7-9 both genders share a top 5 preference for Spongebob, Sam & Cat and Jessie beyond which point top 10 preferences divide along gender lines. iCarly is 3rd for girls with 10%, but apart from Spongebob and Sam & Cat, boy preferences are diluted over a wide choice.
For kids 10-14, new shows enter their top 10 lists, some in later adult viewing time, (Big Bang Theory) but with the notable absence of talent shows seen in other countries.

### Top 10 Most Mentioned Licenses Among Parents of Kids 10-14

(USA - % Mentions - July 2014)

<table>
<thead>
<tr>
<th>Boys 10-14</th>
<th>Girls 10-14</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family Guy</td>
<td>7%</td>
</tr>
<tr>
<td>Spongebob Squarepants</td>
<td>5%</td>
</tr>
<tr>
<td>Sam &amp; Cat</td>
<td>4%</td>
</tr>
<tr>
<td>The Walking Dead</td>
<td>4%</td>
</tr>
<tr>
<td>Pokemon</td>
<td>3%</td>
</tr>
<tr>
<td>The Simpsons</td>
<td>3%</td>
</tr>
<tr>
<td>Dr Who</td>
<td>3%</td>
</tr>
<tr>
<td>Big Bang Theory</td>
<td>3%</td>
</tr>
<tr>
<td>Duck Dynasty</td>
<td>3%</td>
</tr>
<tr>
<td>iCarly</td>
<td>2%</td>
</tr>
</tbody>
</table>
Toys
For infants 0-2, little of toys in the top 10 are character based. They are more gender specific for girls than seen in other countries.
For kids 3-6, the top 10 lists are defined along the lines of gender stereotype, with Barbie leading girls with 20%, Lego leading boys with 21%. 70% of girls top 10 licenses are character based versus 50% for boys who nevertheless embrace action heroes.

### Top 10 Most Mentioned Licenses Among Parents of Kids 3-6
(USA - % Mentions - July 2014)

<table>
<thead>
<tr>
<th>Boys 3-6</th>
<th>Girls 3-6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lego</td>
<td>Barbie</td>
</tr>
<tr>
<td>23%</td>
<td>20%</td>
</tr>
<tr>
<td>Hot Wheels</td>
<td>Disney</td>
</tr>
<tr>
<td>14%</td>
<td>13%</td>
</tr>
<tr>
<td>Fisher Price</td>
<td>Fisher Price</td>
</tr>
<tr>
<td>7%</td>
<td>11%</td>
</tr>
<tr>
<td>Disney</td>
<td>Lego</td>
</tr>
<tr>
<td>6%</td>
<td>5%</td>
</tr>
<tr>
<td>Crayola</td>
<td>Disney Princess</td>
</tr>
<tr>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>Mattel</td>
<td>Mattel</td>
</tr>
<tr>
<td>3%</td>
<td>5%</td>
</tr>
<tr>
<td>Cars the Movie</td>
<td>My Little Pony</td>
</tr>
<tr>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>Thomas and Friends</td>
<td>Hello Kitty</td>
</tr>
<tr>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Marvel</td>
<td>Littlest Pet Shop</td>
</tr>
<tr>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Teenage Mutant Ninja Turtles</td>
<td>Monster High</td>
</tr>
</tbody>
</table>
For kids 7-9 Lego continues to dominate the top 10 for boys, substantially increasing its ratings from 14 to 25% with age, featured in the top 10 girls list at no. 5. Barbie remains the lead license for girls, also strengthening with age, double the no.2, Lego.

Top 10 Most Mentioned Licenses Among Kids 7-9  
(USA - % Mentions - July 2014)

- **Boys 7-9**:
  - Lego: 25%
  - NERF: 18%
  - Mattel: 8%
  - Hot Wheels: 8%
  - Transformers: 4%
  - Minecraft: 4%
  - Skylanders: 3%
  - Star Wars: 2%
  - Microsoft Xbox: 2%
  - Pokemon: 1%

- **Girls 7-9**:
  - Barbie: 22%
  - Lego: 11%
  - Mattel: 10%
  - Disney: 7%
  - Monster High: 6%
  - My Little Pony: 5%
  - American Girl: 4%
  - Lego Friends: 3%
  - Littlest Pet Shop: 3%
  - Hello Kitty: 3%
For kids 10-14, if they had to show allegiance, it would remain with what they know best. 10-14 is not a major toy acquisition age, however video games are notable by their absence amongst boys and for their prominence with girls.

### Top 10 Most Mentioned Licenses Among Parents of Kids 10-14
(USA - % Mentions - July 2014)

<table>
<thead>
<tr>
<th>License</th>
<th>Boys 10-14 (%)</th>
<th>Girls 10-14 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lego</td>
<td>25%</td>
<td>-</td>
</tr>
<tr>
<td>NERF</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Hot Wheels</td>
<td>6%</td>
<td>3%</td>
</tr>
<tr>
<td>Marvel</td>
<td>6%</td>
<td>2%</td>
</tr>
<tr>
<td>Microsoft Xbox</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Mattel</td>
<td>4%</td>
<td>1%</td>
</tr>
<tr>
<td>Transformers</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>Hasbro</td>
<td>3%</td>
<td>1%</td>
</tr>
<tr>
<td>Disney</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>Minecraft</td>
<td>3%</td>
<td>1%</td>
</tr>
<tr>
<td>Barbie</td>
<td>-</td>
<td>17%</td>
</tr>
<tr>
<td>Monster High</td>
<td>9%</td>
<td>-</td>
</tr>
<tr>
<td>Lego</td>
<td>-</td>
<td>8%</td>
</tr>
<tr>
<td>Disney</td>
<td>-</td>
<td>7%</td>
</tr>
<tr>
<td>Mattel</td>
<td>-</td>
<td>6%</td>
</tr>
<tr>
<td>American Girl</td>
<td>-</td>
<td>4%</td>
</tr>
<tr>
<td>Hello Kitty</td>
<td>-</td>
<td>4%</td>
</tr>
<tr>
<td>My Little Pony</td>
<td>-</td>
<td>3%</td>
</tr>
<tr>
<td>Crayola</td>
<td>2%</td>
<td>-</td>
</tr>
<tr>
<td>Monopoly</td>
<td>2%</td>
<td>-</td>
</tr>
</tbody>
</table>

**Boys 10-14**

- Lego: 25%
- NERF: 6%
- Hot Wheels: 6%
- Marvel: 6%
- Microsoft Xbox: 4%
- Mattel: 4%
- Transformers: 3%
- Hasbro: 3%
- Disney: 3%
- Minecraft: 3%

**Girls 10-14**

- Barbie: 17%
- Monster High: 9%
- Lego: 8%
- Disney: 7%
- Mattel: 6%
- American Girl: 4%
- Hello Kitty: 4%
- My Little Pony: 3%
- Crayola: 2%
- Monopoly: 2%
About BrandTrends
Description & Methodology
BrandTrends tracks the vital statistics of brands and Licensed properties.

It’s the comprehensive review of entertainment and sports brands amongst kids and their parents.

Each quarter, BrandTrends measures the relative awareness, popularity and merchandise appeal on the Top 30 most important brands to children.

Each year, BrandTrends interviews over 100,000+ kids.

The reports detail 620+ brands & properties.

BrandTrends is collected via @ a Web interviewing.

Global Perspective, reports are available in 31 countries, soon in 35.

5 territories in Americas.

15 territories in Europe/Middle East.

10 territories in APAC.

1 territory in Africa.

1,280 kids/wave
USA.

2,800 kids/wave
France, Germany, Italy, Spain, UK, Australia, Japan, Brazil, Canada.

1,000 kids/wave
Poland, Russia, China, Taiwan, India, Malaysia, Mexico, Argentina.

800 kids/wave
South Korea, Belgium, Netherlands, Sweden, Denmark, Czech Rep., Hungary, Saudi Arabia, Turkey, South Africa.

400 kids/wave
Indonesia, Thailand, Philippines.

400 kids/wave
USA.

1,000 kids/wave
France, Germany, Italy, Spain, UK, Australia, Japan, Brazil, Canada.

800 kids/wave
South Korea, Belgium, Netherlands, Sweden, Denmark, Czech Rep., Hungary, Saudi Arabia, Turkey, South Africa.

400 kids/wave
Indonesia, Thailand, Philippines.

1,280 kids/wave
USA.

2,800 kids/wave
France, Germany, Italy, Spain, UK, Australia, Japan, Brazil, Canada.

1,000 kids/wave
Poland, Russia, China, Taiwan, India, Malaysia, Mexico, Argentina.

800 kids/wave
South Korea, Belgium, Netherlands, Sweden, Denmark, Czech Rep., Hungary, Saudi Arabia, Turkey, South Africa.

400 kids/wave
Indonesia, Thailand, Philippines.

4 age groups.
Thank You!

Contact

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