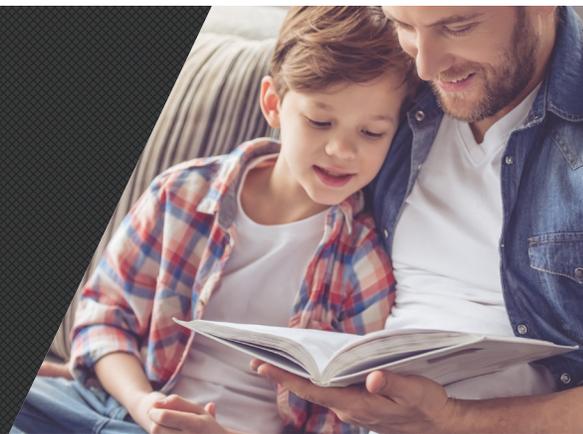


# U.S. Licensing Landscape Impacts



## 3 Critical Market Forces for IP Holders in U.S. Licensing

The U.S. licensed book market has experienced many of the rapidly shifting forces affecting the overall economy and consumer experiences. Some changes were accelerated by the pandemic, including how consumers shop for goods, sources of discovery and influence, types of content consumption and audience engagement, and increased competition for attention and dollars. **Here are three areas IP holders should watch ...**

1

### STREAMING'S IMPACT ON LICENSING STRATEGIES

Licensing strategies can no longer depend on major movie events, holiday schedules, and TV seasons. IP owners need to plan product releases, marketing, and measurement deals with next-generation licenses from gaming, YouTube, social media, and streaming video on demand. These strategies do not often dovetail with conventional retailer planning and merchandising.

2

### CHALLENGES TO FRONTLIST DISCOVERY

For most brands and licenses, front-list publishing — the successful sale of new books and products — is critical to maintaining brand engagement. As traditional bookstores, school bookfairs, and other specialty retailers closed with the pandemic's onset, the market narrowed to mass retailers and books consumers found while surfing online. Consumers are returning to stores, creating more front-list discovery opportunities. Smart, nimble strategies are needed to capture their focus.

3

### THE AGE OF MANGA AND OTHER GLOBAL CONTENT

Once a specialty area, manga is now the fastest-growing segment in publishing. Units are up 20% year to date, following 160% growth in 2021. That's \$235M in MSRP dollar value in 2022. Manga, originally from Japan, is leading a wave of global content hitting U.S. shores. Korean music, European animation, Latin food, renewed interest in Scandinavian design — get ready for new content sources in licensing. Consumer data shows younger generations are open to global content, and technology makes the licensing world smaller.

*Source: The NPD Group/NPD BookScan™ through week ending July 23, 2022*

The **NPD BookScan™ License Reporting** service is your roadmap for licensing opportunities in the U.S. book market. Use it to gain insight into quarterly performance of the top licenses properties, uncover the highest-growth new entries, and access expert analyst insight and industry context.

#### Learn More

Contact your NPD account representative or email [sheryl.harkins@npd.com](mailto:sheryl.harkins@npd.com).