Co-Branding for Competitive Advantage

Literature Review

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There is much to speak of when a topic such as competitive advantage is to be discussed. Attempts often are repeats of some former businesses plan of success, like them, this competitive advantage strategy is meet with excitement as imaginations scream forward in the belief that success is just a given outcome of such promising plan that, “no one has ever done before.” Competitive advantage is one of those things that almost guarantee success when it is done right. Every business person is looking high, low, right, left and under every rock for the miracle advantage whose product is a triumph. There are many approaches one might take such as; a value chain, first mover, first mover, blue ocean, and bricolage to name a few (Upson, Ketchen, Connelly & Ranft, 2012). This paper is reviewing information on a strategy that has been growing in popularity called Co-Branding. Another name for Co-Branding is “Piggy-Backing.” Specifically, franchise piggy-backing as a means of competitive advantage through cost reduction and the filling of product vacuums while creating economies of scale from first mover and blue ocean product advantage. These articles are offered in support of co-branding.

Co-branding trends go way back and were once thought to be a fix-all solution, however, after several attempt and failures eventually fell out of favor (Hurwitz, 1995). Today co-branding is making a comeback. Nevertheless, there is a need to examine some literature from the past to evaluate the pairings of a brand that was beneficial, and those that were not. Also, the reasons behind those failures may be of importance when considering co-branding as a strategy for competitive advantage.

After researching the issue, it is felt by this author that the co-branding of Dutch Brothers Coffee and Jamba Juice is a recopy for success. The question that is still yet to be proven is: Can co-branding be used as a strategy for competitive advantage or do past attempts prove it to be unworthy?

The following review will mostly be categorized in the following: What is it, why do it; Procedures and types; How to use co-branding; Government rules; Who is doing it and what was learned; Effective co-branding and successful cobranding, Problems and Barriers, and then the conclusion. While some of the articles overlap, they can be maintained mostly within one perspective heading.

**What Is It & Why Do It?**

In the beginning, branding was a marketing concept identified with product manufacturers. Today brand pairing, or co-branding, is not limited to product manufacturers. Co-branding has now been successful in service-based organizations, for example, the credit card industry who seems to partner with any molly that will give it a go. Franchise companies have succumbed to the lure of co-branding as well (Hurwitz, 1995). Hurwitz (1995) reveals that the U.S. Department of Commerce reported in a 1987 report on Franchising in the Economy, "Many franchisors are currently involved in testing a new form of franchising comprised of different products under the same roof-in other words a franchisor would sell products and/or services within the unit of another franchisor (U.S., 1987)." Thus, the term "combination franchising," was adopted by early commentators (Annual, 1987).

Piggybacking can use various vehicles, like satellites, kiosks, modules, and carts. Franchise companies have also expanded into non-franchised chains like schools, hospitals, and hotels, or other "special purpose" venues (Charles, 1996). Charles (1996) continues to report that significant benefits are obtained by consumer focus, special purpose venues, and many locations.

Hurwitz (1995) states piggybacking has now become a well-known term in franchising lexicon due to the profiting potential of cost-sharing opportunities, and increased volumes. Risks may be present, but they can be abridged by careful planning.

Why Do It?

According to Hurwitz (1995) for leverage. Leverage means co-branding partners can rely on each other's image, products, and services to advance market penetration and market share. More directly, co-branding offers a franchise opportunity to expand. Products and services are added without incurring the expense nor the risks associated with the R&D. A new customer base is added without risk to the existing one. This makes co-branding a favorite among companies like Yum or Pepsi Co who operate several franchise services.

Sherman (2012) states that there are three critical factors in franchise systems: the brand, the operating system and the support given by the franchise' to the franchisee. The brand creates the demand, then. The operating system presents the deliverables. Lastly, the support and training provide an incentive for growth. By franchising these firms can:

• obtain operating efficiencies and economies of scale;

• achieve more rapid market penetration at a lower capital cost;

• reach targeted consumers more effectively through cooperative

advertising and promotion;

• sell products and services to a dedicated distributor network;

• replace the need for Internal personnel with motivated owner operators;

and

• shift the primary responsibility for site selection, employee training, personnel

management, local advertising and other administrative concerns to the franchisee.

Sherman gives several reasons for Joint Ventures as a formal type of co-branding.

• Develop a new market (domestic or international)

• Develop a new product

• Develop and share technology

• Combine complementary technology

• Pool resources to develop a production and distribution facility

• Acquire capital

• Execute a government contract

• Access a distribution network or sales and marketing capability.

Co-branding has many names but is two business operating under one roof and normally owned by a single owner. However, there are hybrids in which each franchise is its own entity and have separate owners. According to Sherman, there is a big list of benefits.

**Procedures and types**

Sherman (2012) suggests that leveraging intangible assets and developing strategic relationships through co-branding are not just efficient ways to build brand awareness, but also are a cost-effective way for growth when compared to traditional strategies. Conscientious franchising is a must if growing firms and franchisees want to co-exist. Sherman (2012) gives these components for responsible franchising to create a secure foundation.

* A proven prototype location that will serve as a model.
* Models must have been tested, must be profitable, operated successfully.
* Have a strong management team.
* Adequate capitalization to sustain the franchising program.

According to Sherman (2012), there are several types of co-branding. This review will only include the definitions for the ones concerning its interests. The type listed by Sherman are

Joint Ventures and Co-Branding.

Joint Ventures are legal structures that offer another alternative to capital formation for small and growing companies. A less formal method can be achieved by creating strategic alliances or co-branding. Benefits of Joint Ventures include access to resources, relationships, and networks, or goodwill and reputation of a larger corporate partner. The key to these relationships is to define expectations and goals clearly in advance.

All successful joint-venture and strategic-alliance relationships include:

* + A complementary unified force or purpose that binds the two or more companies together;
  + A management team committed to the success of the venture, free from politics or personal agendas;
  + A genuine synergy in which the sum of the whole truly exceeds its individual parts;
  + A cooperative culture and spirit among the strategic partners that leads to trust, resource sharing, and friendly chemistry among the parties;
  + A degree of flexibility in the objectives of the joint venture to allow for changes in the marketplace and evolution of technology;
  + An actual alignment of management styles and operational methods, at least to the extent that it affects the underlying project (as in the case of a strategic alliance) or the management of the new company created (as in the case of a formal joint venture); and
  + The general levels of focus and leadership from all key parties that are necessary to the success of any new venture or business enterprise (Sherman, 2012)

Co-Branding

Sherman (2012) lists two other forms of Co-branding including; financial services co-branding where credit card companies pioneered co-branding by pairing up with airlines or telecommunications companies; retail business format co-branding, which is growing rapidly, and includes creating complementary product lines to offset different consumer tastes (such as Baskin Robbins and Dunkin Donuts, whose products are now offered at the same co-branded locations. This type of co-branding is very similar to the type suggested for this paper.

Cobranding is one of four leveraging options; the other three are line extensions. Stretching a brand vertically in the existing product market and performing marketing penetration using this push tactic.

Sherman (2012) says Co-branding ought to be considered for these reasons (the list is taken directly from paper);

* + It is a way to leverage the company's Intangible assets (including brand awareness and customer loyalty) by entering another product class.
  + It can provide added value in the form of customer convenience thereby creating a point of differentiation from competitive products and services.
  + It is easier and less risky than trying to build a strong brand because there are many internal and external impediments, such as corporate bias against innovation, short-term orientation, price pressures, and competitive threats.
  + It can gain marketplace visibility and create new customer interest, which helps a company maintain brand equity in light of competitors' new product introductions and declining brand awareness.
  + It can change the perception of a brand. The company can create a new brand personality (for example, the use of Bart Simpson with Butterfingers), or at least update it.
  + It can help a company gain access to new product categories that otherwise would have involved a significant investment of time, money and resources.
  + It can provide greater assurance about product quality. A brand name assists consumers' understanding of a product's characteristics, and the presence of a second brand may signal to potential customers that another firm is willing to stake its reputation on the product.
  + It can reach a new customer base far more quickly than a new brand launch, which usually takes several years (three to five years in the credit card industry, for example).
  + It offers a shortcut to an Image upgrade, such as Ford's Special Eddie Bauer Editions.
  + It offers a way to target a key demographic audience, such as MasterCard's creating a co-branded card with universities to reach college students and alumni.

Advantages of Co-Branding

Sherman (2012) co-branding offers many advantages for your business. First co-branding offers shared costs such as marketing, packaging, rent, and utilities through sharing the same location. Next, co-branding permits complementary services to achieve benefits. Thirdly co-branding expedites expansion Into International markets; it can make it easier to achieve brand recognition in foreign markets, it creates convenience for the customer, has the potential to tap into national image and awareness, can increase a firms distribution network, enhance market clout, and it can double brand recognition and endorsement power.

**How to use Co-Branding**

Young et al. (2001) refers to one of the pioneers of co-branding Tricon Global Restaurants who used a tri-branded concept branding KFC, Taco Bell, and Pizza Hut together (Hamstra, 1998a). Though this attempt did not end in great success, it still succeeds in the instruction of co-branding (Young, Hoggatt, Paswan, 2001). Boone (1997) defines co-branding as two or more brands operating within one space. Industry insiders propose that opportunities for co-branding are increasingly flooded (Davis and Ritchie, 1997).

Co-branding methods.

According to Davis and Ritchie (1997), at the time of this report, the most observable firms using co-branding partnerships are McDonald’s with Wal-Mart and Little Caesars with Kmart. Typically, Wal-Mart’s average McDonald’s is operated by a local franchisee. The franchisee pays both rent and royalties to Wal-Mart and still fights for exposure. (Nations’ Restaurant News, 1997). Raithel, (1999) reported that Little Caesars would be closing of many of its stand-alone locations as a result of the looming bankruptcy of K-Mart (Isidore, 2018). On the other hand, this was not all failure as Davis and Richie point out that we have learned from them. Richie and Davis present four methods of co-branding:

1. The internal development of a second brand,

2. The sale of its brand in the acquisition,

3. The purchase of a second brand, and

4. The external development of a second brand.

Internal Development Example

Blimpie International (BI) developed a quick-serve Italian concept called Pasta Central in over 200 Blimpie Subs (Zuber, 1999). Another, Dairy Queen, has its tri-branded concept of Dairy Queen, Orange Julius, and Karmelkorn (Shubart, 1999). The idea is merging or creating co-branding where both brandings are owned by one owner.

Sell Brand Example

Like Lay’s Chips brand in a grocery store, or a line of professional hair products at one's hair stylists (Arkansas Business, 1997).

Purchase Brand Example

Simply entering into a franchising agreement with another franchisor and its franchisees and then run both franchises in the same location. In 1996, Arby’s Inc. Secured a franchise contract with T.J. Cinnamon that would place T.J. Cinnamon products Arby units. (Kramer, 1996). An extreme of this is External development where both firms remain separate entities.

Collaboration and its effect.

Relinquish control through of some things to the franchisee. However, this may suggest managerial actions for the franchisors (Justis and Judd, 1998). Collaboration (e.g., joint action or decision making) for franchisors though is new territory problems may arise in trade dress (e.g. “the total visual image and overall appearance”) (Abbott and Lanza, 1994 p2) and may jeopardize the uniqueness of each franchise. As they say, anything with two heads is a monster.

Managerial Implications

Davis and Ritchie (1997) conclude in saying that there are various methods available for co-branding as a possible approach to marketing. Franchisors should evaluate their expertise in brand development as well as the availability of resources. Evaluation will clarify if a franchisor should attempt to develop a second brand in-house or whether it should collaborate. As more franchisors become involved in co-branding relationships, new knowledge may emerge that documents reasons for success and failure.

**Government Rules**

Cannon (1997) is focused mainly on the avoidance of franchise regulation and escape regulation compliance of the pre-sale registration and disclosure laws. However, Cannon offers many guides to help in the establishing of co-branded franchises. First, a franchisee should begin with a test phase. This allows partners to verify the concept, record operational compatibility, and add a working proposal. Regulatory issues include such things as the fact that a franchise is regulated at both the federal and state levels. States that require full registration before the "offering" or the “selling” of a franchise are California, Illinois, Indiana, Maryland, Minnesota, New York, North Dakota, Rhode Island, South Dakota, Virginia, and Washington.

The FTC

The FTC Rule places a minimum level of protection for prospective franchisees. There are no private rights of action under the FTC Rule. However, the FTC itself may bring an enforcement action against a franchisor who fails to meet its requirements. Penalties for noncompliance include impoundments of assets, cease-and-desist orders, injunctions, mandated rescission and/or restitution for any injured franchisee which may include civil fines of up to $10,000 per violation. The FTC Rule regulates two types of offerings:

1. Package and product franchises and business opportunity ventures. Package and product franchises have three characteristics (this list taken directly from the article) (Cannon, 1997).

• The franchisee must sell goods that meet the franchisor's quality standards (in cases where the franchisee operates under the franchisor's trademark, service mark, trade name, advertising or another commercial symbol designating the franchisor);

• The franchisor exercises significant assistance in the franchisee's method of operation.

• The franchisee Is required to make payment of $500 or more to the franchisor or a person affiliated with the franchisor either before or within six months after the business opens.

Rules Business ventures likewise include three characteristics:

• The franchisee sells goods or services that are supplied by the franchisor or a person affiliated with the franchisor;

• The franchisor assists the franchisee in any way concerning securing accounts for the franchisee or securing locations or sites for vending machines or rack displays.

• Services of a person able to do either.

• The franchisee Is required to make payment of $500 or more to the franchisor or a person affiliated with the franchisor either before or within six months after the business opens.

Cannon also notes that the FTC Rule exempts fractional franchises, leased department arrangements, and purely verbal agreements.

**Exemptions**

Exemptions can prove rewarding. Non-franchise status can reduce transaction costs. Exemptions can be attained by simply avoiding any of the three elements and will not be subject to regulation as a franchise under the Franchise Rules which are “(1) the franchisee obtains the right to sell the franchisor's branded products or to operate under the franchisor's trade name; (2) the franchisor exercises significant control over the franchisee's operations or provides significant assistance to the franchisee; and (3) the franchisee pays a fee” (Cannon, 1997).

Number One

Since the motivation is to broaden the recognition of the brand name or service mark's exposure, there is no real incentive for avoiding this rule (Cannon, 1997).

Numbers Two and Threes

Under the Franchise Rule's definition, a franchise will not develop unless "the franchisor

exerts or has authority to exert a significant degree of control over the franchisee's method of operation (Cannon, 1997). The third is a straightforward payment.

Fractional Franchise Rule

The rule that springs from the unfulfillment of theses is “The Fractional Franchise Rule.” Generally, a franchise involves an ongoing commercial relationship in which fulfills these requirements. The fractional franchise rule offers a way out of being regulated as a franchise. Escaping from regulation may prove possible and even desirable. In most cases, the rewards of locating an escape route are justified financially (Cannon, 1997). Though the federal regulations are present, no state uses the definition of the franchise set forth by those federal regulations because of lack of a consistent pattern of exemptions. Several advisory opinions illustrate the rules for defining fractional franchises which are exempt from regulation. Cannon (1997) offers the following list:

The Franchise Rule defines a fractional franchise as: any relationship in which the person described therein as a franchisee, or any of the current directors or executive officers thereof, has been in the type of business represented by the franchise relationship for more than two years and the parties anticipated, or should have anticipated, at the time the agreement establishing the franchise relationship was reached, that the sales arising from the relationship would represent no more than 20 percent of the sales in dollar volume of the franchise. Further, because at least 80% of its sales are derived from other products, the franchisee is not substantially dependent on the sales of the franchised product for his success.

Thus, according to Cannon, the fractional franchise definition has only two essential elements: 1. The franchisee or its management must have substantial experience (minimum of two years gained any time in the past except in Ca. where it is within the last seven years) in the same or a related line of business; 2. Projected sales of the franchisor's products or services by the franchisee may not exceed 20% of the total sales (Cannon, 1997).

The 20 percent rule has a three-step process:

1. Projecting the sales of the guest products for at least a year from the date the relationship begins.
2. Projecting the total gross revenues for the same period
3. Dividing the first amount by the second.

Canon further evaluates a trademark license is an essential ingredient of co-branding. The granting of a limited-right-to-use will suffice. There are also suggested space allocations for each trademark and sign.

Finally, Canon (1997) exerts that it is easier to justify an exclusion for a simple concept that for a complicated one. Avoiding Franchise Rule compliance holds an attraction for co-branding especially for the future franchising's landscape. Identifying an exemption or exclusion using the fractional rule will be rewarding in the form of reduced transaction costs, increase flexibility, and in structuring. Despite countervailing factors, enough co-branding partnerships can benefit from franchise exclusion to justify the time and energy required to attain it.

**Who Is Doing It and What Was Learned**

Frumkin (2002) reports that Dunkin' Donuts is opening full-scale outlets in several Home Depot stores. This latest high-profile partnership between a national foodservice operator and a major retailer is touted as a success in more than one way. Not only will it save construction personnel time in a normal morning stop for coffee and donuts, but since many make a stop at Home Depot, also all estimates foretell a profitable relationship. Huddle House franchisees in like kind and placing franchises in major retailers. Other prominent foodservice chains that are placing franchises with U.S. retailers include McDonald's, Nathan's Famous and Little Caesars Pizza.

Another sandwich chain operator, which is buying back its largest franchised territory and eyeing co-branding with a pizza chain (Ruggless, 2002). Ruggless (2002) declares that Schlotzsky's reported positive performance in its 35 company-owned restaurants. Co-branding efforts in their area developer territory will make co-branding in key markets more attractive and achievable. A further opinion presented is that future boosts in royalty and licensing through co-branding opportunities show potential promise in revenue. New concepts are developing to prove that co-branding is becoming a strategic plan to cut costs and broaden the customer base (Ruggless, 2002).

Daley (2012) writes that co-branding can create a one-stop option for groups of people with different cravings. Yum is the holding company that owns and operates Taco Bell, KFC, Pizza Hut, A&W, and Long John Silver's. Daley reports that Yum hails co-franchising as

the biggest sales and profit driver for the restaurant industry since the invention of the drive-thru window. In 2002, co-branded outlets credited $2 billion in sales on the books for Yum (Daley, 2012). Why? Because not only does co-branding save on operational but it evens out customer flow. The secret is making sure partnerships are jointly beneficial. Daley continues to warn that the last few years have been riddled with co-branding marriages that died. Co-branding can be successful if it's done between complementary brands. Economies of scale are found easy for those who succeed (Daley, 2012).

**Effective Co-Branding**

Roddy (2013) also reported on Schlotzsky’s who said, “We've also begun adding Carvel Ice Cream concepts to new Schlotzsky's, making them tri-branded franchise locations, and all future franchise agreements for a Schlotzsky's restaurant include both Cinnabon and Carvel concepts.”

Roddy further reported that there are many economic and operational benefits to co-branding. The key to success is in pairing two brands that complementary. In addition, communication is key. Having the correct brand pairing should benefit the franchisee operationally, in Marketing and Identity Retention, and with Customer Service (Roddy, 2013).

**Successful Cobranding**

Wright & Frazer (2007) begin by reporting about franchising in Australia. Saturation and maturity are the results of the macroeconomic forces and federal regulation on franchising.

Early explanations of franchising foretold a resource constraints theory that argued franchising was the source of external capital needed for expansion while administrative efficiency theory stated that franchising was poised to overcome any agency problems associated with any rapid expansion.

At its heart, most agree that cobranding involves combining two brands to produce a single product or offering. Looking at the most successful business in co-branding will help to draw the lines.

Brand extension or co-branding?

The golden arches were truly strong enough to carry a sub-brand to start. They introduced McCafé in 1993 as a coffee pot on the counter of the McDonalds. McDonald's soon began encouraging franchisees to own the entire outlets containing all three brands (Wright & Frazer, 2007). McDonald's felt that McCafé was a great collaboration venture. Wright & Frazer reported that the McCafé / McDonalds success produced the following themes and propositions.

Theme 1: Attracting customers

Interviewees reported that, after the introduction of McCafé, the struggle of competition between McDonalds and McCafé did not happen as expected. Instead, for every generated a dollar’s worth of sales in the McCafé, McDonald's generating between 50 cents to 2 dollars in additional sales.

Theme 2: Competition

Different segments of the market were identified both as new and old customers. Also, encroachment has shown to be a motivating factor for franchisees to incorporate them. As a result, it is more likely that McCafé will continue to increase as it enhances sales and profitability (Wright & Frazer, 2007). As a bonus, lower operational costs for the franchisee are also apparent.

Theme 3: Reinvigorated brand equity

Wright & Frazer (2007) point out that the reinvigoration of a brand is a recognized motivation for co-branding.

Theme 4: Growth incentives

Co-branding brings unit-wide growth for McDonald's franchising; as a model for growth is fundamental to its culture. Focusing on increasing sales and profitability and acknowledgment of a significant return on investment (ROI) is also listed as a reason for franchisees to acquire McCafé.

Theme 6: Culture

Culture as an intangible aspect of any organization remains a more complex part of retail co-branding. However, culture-adapted well in each franchise.

Theme 7: Legal issues

Both incentives and barriers appear as inhibiting forces, however, in co-branding they are particularly significant. As a result, a considerably larger investment is required to help overcome these cultural and system barriers (Wright & Frazer, 2007).

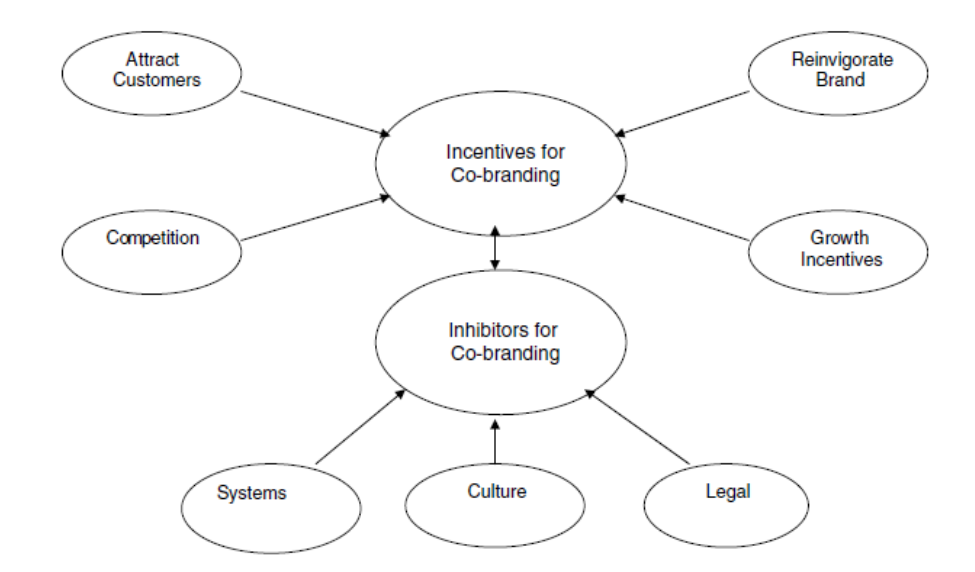
Summary

Wright and Frazer summarize that the first four themes represent a positive motivation in favor of co-branding. Essentially incentives are founded on growth opportunities due to co-branding. Wright & Frazer (2007) offer the following four propositions.

Proposition 1: The motivational forces for franchising co-branding relate to synergies across the brands and growth opportunities, in a similar way to other forms of co-branding.

Proposition 2: The inhibiting forces to franchising co-branding are particularly strong, requiring large investments in systems and cultural re-alignment.

Proposition 3: For an organizational cobrand to be successful within a franchised retail environment, the company involved might favor acquisition to minimize the investment costs against the barriers or inhibiting forces.

 **Problems and Barriers**

Sherman (2012) reports that a poorly prepared business plan or inadequate capital structure is the main cause of franchise failure. For success one must access a distinctive and protected trade Identity, proprietary and proven methods of operation and management, make use of a comprehensive training program, comprehensive legal documents, a demand for the products and services, genuine understanding of competition, and good relationships with suppliers and lenders is a short list of the thing mentioned (Sherman, 2012).

**Conclusion**

The main reason for this review was in support of co-branding. However, Cannon (1997) revealed that, while co-branding offered great benefit, the FTC exemption was worth having. Basically, due to the struggle and comprehensive regulation on both federal and state levels, the better solution seems to be a brand extension. This is the same as co-branding but is an in-house brand. Wright & Frazer (2007) revealed the power of this with their McDonalds / McCafé study. This review reveals the benefits of co-branding by way of brand extension to be superior provided the Trade Marking franchise is secure enough to support the venture. The biggest inconsistency is that most of these papers of ten years old, there is a lack of information or peer-reviewed papers currently on the topic.

Further study of current conditions in co-branding franchises is needed for an accurate and timely evaluation. Also, further study of this technique is needed. Single franchisees who extend their brand through co-branding while maintaining FTC exempt status. Lastly, the author performed this review for information and support in the piggybacking of Dutch Brothers Coffee with Jamba Juice. After performing this review, it is felt by the author that a better solution is to acquire only the Dutch Brothers name rights and not the full franchise. This will be better suited for the brand extension of Dutch Brothers Plus.

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