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BRAND LINKAGES: WINNERS, LOSERS AND HOW TO MEASURE THESE

ABSTRACT

Brand owners constantly seek strategies to improve their brand's popularity. One such strategy is to seek a co-operative relationship with another brand, termed a "brand linkage". This study represents one of the first attempts at empirical and experimental research on brand linkages in a South African marketing communication environment. One such brand linkage between Engen (a fuel service station) and Woolworths (a speciality food retailer) is examined. Results showed that awareness of the brand linkage did have a marked effect on the overall rating of Engen. Implementing a pretest–posttest control group design, results also showed that there were statistically significant differences between pre- and post-intervention ratings of Engen (the host brand) for the groups that were exposed to a campaign depicting the brand linkage. The research provides practitioners with a measuring instrument that can be replicated easily and provides insight for marketers on leveraging the value of brand linkages.

Keywords: brand linkage; brand linkage campaign; brand ratings; brand relationships; stakeholders; card scoring method, pretest-posttest control group design

INTRODUCTION

More and more marketers are utilising brand linkages to create brand value (Fill & Jamieson 2006; Kuhn, Alpert & Pope 2008; Sweeney 2003; Ueltschy & Laroche 2011; Wolfe & Putler 2002). This has resulted in studies which investigate factors influencing the success of a brand linkage strategy (Knittel & Stango 2012).

Thus the authors of the current study asked:

- What is the impact of brand linkages on stakeholder ratings of brands?
- What is the impact of a brand linkage campaign on stakeholders' ratings of brands?

In order to answer the general research questions, the following research objectives were formulated:

- To measure brand ratings of a linked brand
- To measure brand ratings of a linked brand following exposure to a linked brand campaign

- To measure whether the host brand gains (or loses) a clear competitive advantage as a result of the linkage with the invited brand

LITERATURE OVERVIEW

Brand linkages have attracted the attention of marketers, advertising professionals and researchers. Examples of linked brands are Ferrari and Shell, Bacardi and Coke, Coca-Cola and Heinz, Microsoft and Nokia, Dell and Intel, and many others. The intent of any brand linkage is critical; it can resolve a business problem, it can create brand awareness, trial, usage, advocacy or retention, or create the opportunity for consumer lifetime value growth. According to Fournier and Alvarez (2013), a brand linkage strategy entails that customers' experience of two or more brands will create a brand relationship between these brands which will benefit both the brand stature of the host brand and sales. The intent, however, of any marketing intervention is the driver that will require what kind of brand linkage is required.

Classification of brand linkages

The concept brand linkage is used broadly and sometimes confusingly in the literature. Classifications may sometimes overlap and are often used interchangeably with terms such as brand alliances, brand co-operation, joint sales promotions, bundling, dual branding, composite brand extensions and co-branding (Anslinger & Jenk 2004; Leuthesser, Kohli & Suri 2003; Simonin & Ruth 1998). Others include joint promotions, composite branding, affinity partnering, complementary branding, symbiotic marketing and co-advertising (Washburn, Till & Priluck 2000). Even though many brands appear as single brands, they engage other brands in other ways, which may affect consumers' perceptions of brand relationships (Gammoh & Voss 2011). Brand linkages can also be unintentional or associative on the consumers' side; however, in this context brand linkages are referred to as purposeful, intentional linkages.

There are numerous and varied forms of brand linkages. Creating a linkage to offer an extended service to customers or to drive incremental foot traffic is very different from creating a linkage between a brand and a sports personality, or a television station giving away a car brand as a prize (which becomes a short-term promotional linkage). Other brands are linked for the duration of an event such as the Olympic Games or the International Football Federation (FIFA) and, for example, Hyundai, Kia or Emirates (Jones 2016: 52). Some brands are linked because they naturally fit, e.g. Bacardi and Coke, also called affinity partnering (Mooney 2009). Most airlines have reward programmes that involve some form of linkage, including British Airways and American Express or South African Airways and Avis (Avis 2016). Co-branding strategies may also be employed to showcase a university's research collaboration with a well-known brand in developing new car engineering technology, for example Nanyang Tech with Rolls Royce (Anonymous 2013).

As mentioned, the intent of a brand linkage is critical. This article focuses on purposeful joint-venture co-branding, a brand linkage technique used to transfer positive

associations of a company's product to a joint brand, or to create operational synergy between established brand(s) (Beezy 2007).

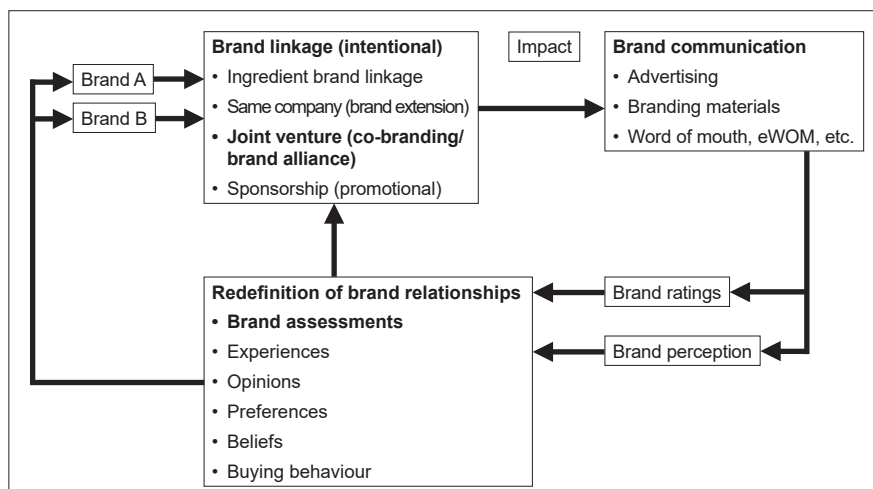
The impact of brand linkages on brand assessments

Consumers' experiences with brand linkages affect their brand evaluations and relationships (Randall 2009). The perception of brand linkages is created inside the mind of the consumer. The purpose of a brand linkage is for each of the brands to derive added value, but it can also be said that the exponential gain can be greater in that the whole becomes greater than the sum of the parts (Jevons, Gabbott & De Chernatony 2002; Kotler & Keller 2009). However, customers can perceive some brands as "good" and others as "bad", and studies have shown that perceived brand quality can harm or promote the partnering brands (Baker & Saren 2010; Buil, De Chernatony & Martínez 2013). In some cases a brand linkage may lead to the devaluation and dilution of the brand value of one or both brands (Ettenson & Knowles 2007; Leuthesser *et al.* 2003). A poorly conceived brand linkage can also result in loss of investment, brand value and brand equity (Baker & Saren 2010).

CONCEPTUAL FRAMEWORK

In view of the need to establish research insights into the impact of an intentional joint-venture co-branding strategy, the authors of this article focused on testing the effect of such a brand linkage as conceptualised in Figure 1. The model shows the relationships between five key constructs: brand linkages, brand communication, brand ratings, brand perceptions, and redefinition of brand relationships. Although not all of these constructs (brand perceptions and brand relationships) are explicitly discussed or measured for the purposes of this article, the model itself was useful in guiding current research and in suggesting future research.

FIGURE 1: BRAND LINKAGE ASSESSMENT MODEL



Brand linkage

Two brands, Brand A and Brand B, partner purposefully with a strategic intent. In this study, as discussed earlier, the choice of purposeful brand linkage to be tested was identified as a joint-venture co-branding (and not for instance same-company brand extension or sponsorship). The ideal was to find two brands that were linked but separately owned and that appealed to the same target market. Following consideration and shortlisting of a number of such linked brands, the choice ultimately fell upon Engen (a South African fuel service station) as the host brand and Woolworths (a speciality food retailer) as the invited brand.

Brand communication

For the purpose of this study, Engen and Woolworths' brand linkage advertisement campaign was used as stimulus to test customers' ratings of Engen. Other forms of brand communication exist, of course, which are not restricted to advertising campaigns, but can also include word of mouth, social media, etc.

Brand ratings

Brand ratings was the main method to assess the effect of the brand linkage in this study. A non-verbal measuring instrument, known as card scoring, was preferred because it did not limit stakeholders to think and act in accordance with predetermined rules. Brand ratings entail evaluation of strength, risk and potential of a brand comparative to its competitors by means of a scale. In this study the card scoring method and the number of cards allocated to a brand (as if stakeholders were asked to "put their money" on the brand) was used as the measurement "scale".

Brand perceptions

Brand perceptions may be defined as the stakeholder's preferences, attitudes, opinions and beliefs which influence their purchase intention and willingness to recommend a product. Therefore, in this study brand assessments were used as a generic concept, which included brand ratings and brand perceptions. Brand ratings were measured, although reference was made to the role of brand perceptions.

Brand relationships

Brand relationship refers to the interaction between a brand and stakeholders. Conceptions of brand relationships are based on stakeholders' perceptions, opinions, preferences, beliefs experiences, and buying behaviour, which will be used interchangeably in this study. It is the symbolic assigning of human properties to a brand, leading to stakeholders' interaction with a brand as in social relationships (Fournier & Alvarez 2013: 253; Schmitt 2012: 11).

METHODOLOGY

Sample

Due to budget constraints, a non-probability convenience sampling method was used to select 250 respondents. Selection criteria included several street intercepts, shopping malls, worksites/businesses, homes, and University of Johannesburg campuses (staff and students) drawn from the Gauteng province of South Africa. Voluntary participation took place between 18 September 2013 and 28 January 2014. While a small percentage of these respondents were not employed or did not own or drive a car, they were included as stakeholders as they still could access Engen stations as walk-ins or via taxis to make use of Woolworths. Because this was a convenience sample, results cannot be imputed to population representivity. This sample, however, was chosen for the purpose of an explanatory experimental study (discussed below) to establish causal relationships between variables (brand linkages and brand ratings). According to Babbie and Mouton (2009: 212-213), the point of such experimental research is to increase internal validity by using groups that, through random allocation to the experimental and control group, are comparable in most respects except for exposure to some kind of intervention (or the experimental variable).

Research design

The research design was quantitative and incorporated a card sorting procedure followed by an experimental design analysis, which are discussed in the following sections.

Measuring instruments

Card sorting procedure

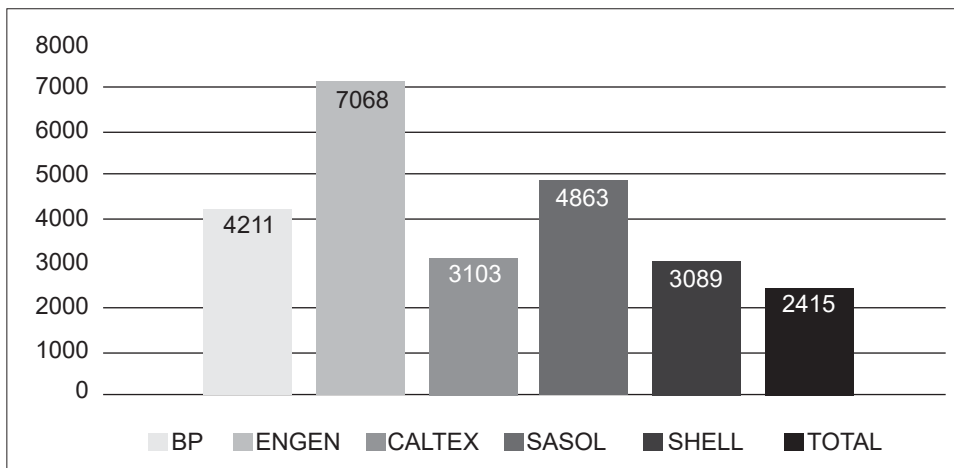
Respondents were given envelopes labelled with the names of six major fuel service station brands and a set of 99 cards. They were asked to allocate these cards to each brand in accordance with their general assessment of the brands by placing cards in each envelope. This score, for each respondent, represented a baseline measure of brand salience for each brand. These envelopes were then set aside for later tabulation and analysis. The results for six fuel station brands are presented in Figure 2.

The total number of votes allocated was 24 750. If these votes had been randomly distributed (that is, no differentiation between brands) each brand would have received 4125 votes. Engen's score at 7068 was therefore 71% higher than a random score. The average score for Engen, per respondent, was 28.2 votes (7068/250) compared to an average random score, per respondent, of 16.5 votes.

Respondents were then asked whether they were aware of these brands being associated in any way with any other brand or brands. Responses were recorded on the questionnaire. There were 101 respondents who were spontaneously aware of the Engen/Woolworths brand linkage. These "aware" respondents allocated 6637 votes to Engen, which on average rated Engen 65.7 votes compared to a random allocation score of 16.5 votes and the Engen average of 28.2 votes. This indicated that those

respondents who were spontaneously aware of this linkage were more likely to rate Engen's salience much higher than average, that is 65.7 versus 28.2. Therefore, the clinical results already gave a clear indication that the brand linkage itself (before exposure to the linked brand campaign) resulted in noticeably higher ratings of Engen as a linked brand by those who were aware of the linkage.

FIGURE 2: RESULTS FOR SIX FUEL STATION BRANDS



Experimental design

Based on the first card sorting procedure, two comparison groups were selected, based on whether they were aware, or not, of the Engen/Woolworths brand linkage. Members of the group who were aware of the brand linkage were assigned at random to an experimental and control group. Members of the group who were unaware of the brand linkage were also assigned at random to an experimental and control group. The experimental groups were exposed to advertising material depicting the brand linkage. The card sorting method was then repeated to assess the impact of the advertising material on brand ratings. All respondents, whether they were exposed to this intervention or not, were asked to resort the cards.

A pretest-posttest control group design (Babbie & Mouton 2015; Campbell & Stanley 1963) was used to evaluate whether there were significant differences in brand ratings between the (experimental) groups who were aware and unaware of the linkage and the (control) groups who were aware and unaware of the linkage. Respondents were randomly allocated into four groups and each participant received 99 cards, as described earlier.

- 20% (N=50) aware group (those who mentioned Engen being linked to Woolworths) and were exposed to an intervention by being shown the campaign;
- 20.4% (N=51) aware group no intervention (campaign);

- 29.6% ($N=74$) unaware group (those who did not mention Engen being linked to Woolworths) and were exposed to the intervention; and
- 30% ($N=75$) unaware group with no intervention.

Note that the numbers of respondents randomly allocated to each group were more than adequate for statistical analysis, as the rule of thumb minimum number for statistical analysis is regarded as at least 30 respondents per group or more (Van Voorhis & Morgan 2007: 43).

Validity

As previously discussed, because a convenience sample was employed for the purposes of this research, results cannot be imputed to the larger population (external validity). However, as the purpose of the experiment was to ascertain the impact of the intervention itself and to eliminate other influences on the comparison groups, the pretest-posttest control group design was chosen as the experimental design most suitable for this purpose due to its high internal validity, as explained in Table 1 (Babbie & Mouton 2015; Bordens & Abbott 2014; Campbell & Stanley 1963).

TABLE 1: INTERNAL VALIDITY THREATS

Threat	How it was dealt with
History	No other events occurred which could be confounded with the experimental variable
Maturation	Manifested equally in experimental and control groups
Instrumentation	The use of a fixed measuring instrument (card sorting) ensured that this was not a problem
Selection	Randomisation has assured group equality. Aware and unaware groups were assigned at random to experimental and control groups
Testing	Manifested equally in experimental and control groups
Statistical regression	If this was a problem it would have manifested equally in experimental and control groups due to randomisation
Experimental mortality	All respondents participated throughout the research; therefore there was no effect on the research data collection

(Sources: Bordens & Abbott 2014: 326; Campbell & Stanley 1963: 7-9)

Experimental design analysis: Statistical analyses

Differences between the four groups (inter-group comparisons) after intervention

Inter-group comparisons were firstly conducted to determine whether there were significant differences between the four groups' posttest scores following exposure to the intervention.

TABLE 2: DIFFERENCES ACROSS FOUR GROUPS (POSTTEST)

		N	Mean	Std. deviation	Std. error	Min.	Max.
Post_Engen	Aware, Intervention (campaign)	50	37.34	22.451	3.175	0	99
	Aware, No Intervention	51	33.71	23.033	3.225	0	99
	Unaware, Intervention (campaign)	74	35.07	25.133	2.962	0	99
	Unaware, No Intervention	75	30.06	22.934	2.614	1	99
	Total	250	33.70	23.530	1.488	0	99

Test Statistics a,b			
	Chi-Square	df	p-value
Post_Bp	.548	3	.908
Post_Engen	5.411	3	.144
Post_Caltex	1.375	3	.711
Post_Sasol	6.950	3	.074
Post_Shell	5.401	3	.145
Post_Total	1.953	3	.582

a. Kruskal Wallis Test

b. B. Grouping Variable: Groups

Significance: ($p < .05$); Not significant: ($p > .05$); Confidence level: 95%

A Kruskal-Wallis test revealed no statistically significant difference across the four groups and how respondents rated Engen (aware intervention, $n = 50$: aware no intervention, $n = 50$: unaware intervention, $n = 74$: unaware no intervention, $n = 75$), $\chi^4(4, n = 250) = 54.11, p = .144$ after the intervention (see table 2). The aware intervention group recorded a higher mean score ($M = 37.34$) than the other three groups, which recorded mean values of 33.71, 35.07 and 30.06.

Differences between the four groups over time (intra-group comparisons)

Although the inter-group comparisons revealed no significant differences between the four groups following the intervention (which could, however, potentially become significant with an increase in sample size), it was also necessary to investigate each of the four groups separately and compare for significant differences between the pre-intervention and post-intervention ratings of Engen for each group.

TABLE 3: DIFFERENCE BETWEEN PRE-INTERVENTION RATING AND POST-INTERVENTION RATING FOR EACH GROUP ON ENGEN

		Mean	N	Std. Deviation	Std. Error Mean
Aware, Intervention (campaign)	Pre_Engen	29.74	50	24.625	3.483
	Post_Engen	37.34	50	22.451	3.175
Aware, No Intervention	Pre_Engen	31.51	51	21.495	3.010
	Post_Engen	33.71	51	23.033	3.225
Unaware, Intervention (campaign)	Pre_Engen	25.03	74	20.879	2.461
	Post_Engen	35.07	74	25.133	2.962
Unaware, No Intervention	Pre_Engen	26.86	75	22.981	2.619
	Post_Engen	30.06	75	22.934	2.614

A paired Wilcoxon Signed Rank Test was conducted to evaluate the impact of the intervention on participants' scores on Engen (see tables 3 and 4). There was a statistically significant increase for aware group from pretest ($M = 29.74$, $SD = 24.625$) to posttest ($M = 37.34$, $SD = 22.451$), $t(3) = 36.58$, $p < .006$ (two-tailed) and for unaware intervention group from pretest ($M = 25.03$, $SD = 20.879$) to posttest ($M = 35.07$, $SD = 25.133$), $t(3) = 33.32$, $p < .001$ (two-tailed). The mean score increase in Engen scores was 7.6 with a 95% confidence interval ranging from 30.96 to 43.72 and 27.23 to 40.18 respectively. The median scores on the four groups increased from the pretest ($Md = 21$) to the posttest ($Md = 27$). Similarly, the mean scores on the four groups increased from the pretest ($M = 27.86$) to the posttest ($M = 33.70$). Conversely, the results of the Wilcoxon test did not show any significant differences in the Post-Engen – Pre-Engen on both aware and unaware with no intervention. This implies that the experimental groups showed significant difference as a result of the treatment, whereas the control groups showed no significant difference as they did not receive any intervention.

TABLE 4: SIGNIFICANCE OF DIFFERENCES FOR THE FOUR GROUPS

Groups		Ranks	N	Mean of ranks	Sum of ranks
Aware, Intervention (campaign)	Post_Engen Pre_Engen	Negative Ranks	17d	17.88	304.00
		Positive Ranks	30e	27.47	824.00
		Ties	3f		
		Total	50		
Aware, No Intervention	Post_Engen Pre_Engen	Negative Ranks	15d	22.03	330.50
		Positive Ranks	26e	20.40	530.50
		Ties	10f		
		Total	51		
Unaware, Intervention (campaign)	Post_Engen Pre_Engen	Negative Ranks	20d	29.83	596.50
		Positive Ranks	49e	37.11	1818.50
		Ties	3f		
		Total	74		
Unaware, No Intervention	Post_Engen Pre_Engen	Negative Ranks	31d	35.58	1103.00
		Positive Ranks	40e	36.33	1453.00
		Ties	4f		
		Total	75		

d. Post_Engen < Pre_Engen

e. Post_Engen > Pre_Engen

f. Post_Engen = Pre_Engen

In addition, a Wilcoxon Signed Ranks test revealed a statistical significant favourableness in Engen following the Engen-Woolworths campaign intervention on both aware ($n = 101$, $z = -2.753$, $p = .006$, $r = .28$) and unaware ($n = 149$, $z = -3.655$, $p < .001$, $r = .31$) groups, with a small and medium effect size (See Tables 3, 4 and 5).

TABLE 5: DIFFERENCES BETWEEN THE PRE- AND POSTTEST RATINGS FOR THE FOUR GROUPS

Test Statistics ^a								
	Groups							
	Aware, Intervention (campaign)		Aware, No Intervention		Unaware, Intervention (campaign)		Unaware, No Intervention	
	Z	Asymp. Sig. (2-tailed)	Z	Asymp. Sig. (2-tailed)	Z	Asymp. Sig. (2-tailed)	Z	Asymp. Sig. (2-tailed)
Post_Engen – Pre_Engen	-2.753 ^c	.006**	-1.297 ^c	.195*	-3.655 ^c	.000**	-1.003 ^c	.316*
a. Wilcoxon Signed Ranks Test								
b. Based on positive ranks								
c. Based on negative ranks								

**Significance: ($p < .05$); *Not significant: ($p > .05$)

DISCUSSION

Engen scored higher than competitors overall. Engen was more favourably rated amongst those who were spontaneously aware of the linkage. Engen scored higher amongst those who were exposed to the campaign than those who were not exposed to the campaign. The results therefore clearly indicated that Engen as the “main” or the “host” brand gained a clear competitive advantage because of the Engen/Woolworths brand linkage, and because of the brand communication depicting the linkage. These results confirm Neale, Baazeem and Bougoure’s (2009: 5) suggestion that brand linkages can significantly influence parent-brand relationships. It also suggests that significantly increased ratings of the host brand is a direct result of a clear and well-justified strategic intent and strategic communication of the brand linkage (in this case joint-venture co-branding between fuel station Engen and food retailer Woolworths). It suggests that the establishment of Woolworths’ fast food shops at Engen fuel stations resulted not only in increased brand stature of Engen, but could also increase previously untapped market segments from Woolworths and Engen.

Whilst brand ratings were measured via the card sorting method, brand perceptions also form part of brand assessments as indicated in the model. Whilst brand perceptions were not discussed in this article, respondents were asked a battery of questions in order to add further qualitative understanding to perceptions of the brand linkage and the brands separately. Although interesting and supporting insights were gained about perceptions of the brands separately and jointly, these results are not discussed for

the purpose of the article, as at the time that the questions were asked, all participants had already become aware of the linkage.

CONCLUSION

This study represents one of the first attempts at empirical and largely experimental research on brand linkages in a South African marketing communication environment. The principal finding is that the linked brand (Engen) performed high against its competitors and that, as the host brand, gained a competitive advantage as a result of the brand linkage.

The article outlines a measuring instrument that can be replicated universally to assess the effectiveness of brand linkages. Retesting over time can also indicate the reliability of the measuring instrument. The design only tested for internal validity; in addition, given a proper random sampling method, external validity can be assured. An increase in the sampling size may also yield significant differences as far as inter-group comparisons are concerned. In addition, the measurement of brand perceptions, via further quantitative and qualitative measurements, could shed further light on the impact of brand linkages on brand assessments.

Whilst the categories used for this study were limited to convenient food stores and fuel service stations, research on several other types of brands and brand linkages would also afford researchers a greater understanding of their impact on brand assessments. Likewise, it could be interesting to measure the effect of brand linkage on brand communication (e.g. in social media) with different types of brand categories being paired.

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