

TRADEMARK LAW
Law 327 (R01)
George Mason University
Antonin Scalia Law School
Tuesdays & Thursdays
6:05 p.m. – 7:30 p.m.
Fall 2024

Irwin R. Kramer
ikramer@gmu.edu

OFFICE HOURS: Taking questions after class; available “virtually” anytime by appointment [<https://gmu.zoom.us/j/6064590465>].

Course Description: Covers procedural and substantive law in obtaining trademark registrations in the U.S. Patent and Trademark Office and enforcement and licensing of federal and state registrations after they are obtained. Topics include trademark ownership, registration, misappropriation, infringement, and dilution in the context of words, phrases, symbols, slogans, product design, and trade dress.

Course Materials: The following assigned books have been [placed on Canvas for free download](#)--

1. Barton Beebe, TRADEMARK LAW, Kramer Adaptation (2024);
2. Kramer, Selected Federal Trademark Statutes (2024)

Learning Outcomes: When the law meets pop culture, the combination is as entertaining as it is fascinating. Unlike many legal topics, the issues arising in Trademark Law and the cases deciding them are actually fun to read. With proper class preparation and active participation, you will leave this class understanding:

- The Importance of Trademarks in Protecting the Business Interests of Clients
- The Value of Trademarks in Protecting Consumers
- The Prerequisites of Effective Trademark Registration and How to Protect a Client’s Brand
- The Limitations of Trademark Protection, As Well As Defenses to Claims of Trademark Infringement and Related Forms of Unfair Competition

If nothing else, I can assure you that, after taking this course, you will never read a billboard, watch a commercial, shop online or roam through a store the same way again.

Problem-Oriented Assignments: Beyond reading assignments, we will apply the law through several exercises in class and at home. If you complete them diligently, you will have lots of practice applying the law to scenarios quite similar to those you will be tested on. Where CALI

exercises or other problems are assigned as homework, you are expected to complete each prior to the class for which they are assigned to be marked present for that class.

Class Attendance & Participation: This is an interactive course. Your active and consistent participation is critical to the quality of our learning experience. This is particularly essential in a small class requiring everyone's engagement. Having eliminated the need to travel, I expect everyone to log into every single class with cameras on by the time we start. While there may still be occasions where this is not possible, students with more than four unexcused absences (or more than six regardless of the reason), will not be permitted to complete the course. Just as lawyers must attend to their tasks prepared, on time and ready to participate, I expect the same from you. If you do not believe you can meet this expectation, please do not register for this class.

Grading:

Grading Component	Percentage
Final Examination [†] December 10, 2024	100%* [3-hour closed book; multiple choice (in format of the Multistate Bar Examination) and/or short-answer questions]
*Class Preparation & Participation	Much depends upon exam performance. But those who contribute to the quality of our class may merit an increase in the quality of their grades. For students whose point totals border the next highest grade, the instructor has the discretion to increase a grade by one half-step based on strong preparation, class performance and timely/thorough completion of all assignments.

[†] Final Examination will be conducted in-person at Mason Square (Arlington campus).

Class Recording Policy: Classes will be recorded on Zoom and posted to Canvas. Any materials projected in class will likewise be available on the video. In return, students agree not to post this material on other platforms where the instructor's embarrassing antics may go viral.

Course Web Site & CALI Site: This course has a [Canvas page](#) that links to this syllabus, announcements, assignments, CALI exercises and materials. You are responsible for registering a [CALI account](#) using the school's case-sensitive authorization code of GEOGMAstu79, and for self-enrolling in the Canvas page and checking it regularly.

Course Outline: Following this outline, I have posted all class assignments on our Canvas page. If necessary, I will modify them to adjust to the pace of the class, posting the final version of upcoming assignments by Wednesday of the previous week.

INTRODUCTION..... **1**

A. The History of U.S. Trademark Law.....	1
1. <i>The Origins of Trademarks and Trademark Law.....</i>	<i>1</i>
2. <i>The Trade-Mark Cases.....</i>	<i>3</i>
3. <i>The Statutory Development of U.S. Trademark law and the Lanham Act.....</i>	<i>4</i>
B. The Policy Justifications for Trademark Protection	4
1. <i>The Economic Justification for Trademark Protection</i>	<i>5</i>
2. <i>Criticisms of the Economic Justification for Trademark Protection</i>	<i>6</i>
3. <i>The Donald's New Game of Trademark Monopoly.....</i>	<i>9</i>
C. Trademark Law Within the Larger Scheme of Intellectual Property Law	12

CALI EXERCISE: [Trademark Policy](#) [45 minutes]

ESTABLISHING TRADEMARK RIGHTS **19**

A. Trademark Distinctiveness	22
1. <i>Inherent and Acquired Distinctiveness of Source</i>	<i>23</i>
a. Inherent Distinctiveness of Source.....	23
i. The Abercrombie Spectrum.....	23
Abercrombie & Fitch Co. v. Hunting World, Inc.	24
ii. Distinguishing Suggestive from Descriptive Marks.....	28
Zatarains, Inc. v. Oak Grove Smokehouse, Inc.....	29
Innovation Ventures, LLC v. N.V.E., Inc.....	31
iii. Special Rules for Classification of Certain Kinds of Trademarks	35
(a) Descriptiveness of Geographic Terms	35
(b) Certification Marks and Collective Marks	36
(c) Surnames	38
(d) Non-English Words: The Doctrine of “Foreign Equivalents”	40
(e) Acronyms.....	41
b. Acquired Distinctiveness of Source	41
Frosty Treats Inc. v. Sony Computer Entertainment America	42
Cartier, Inc. v. Four Star Jewelry Creations, Inc.	45
c. Generic Marks.....	49
USPTO v. Booking.com B.V.	51
Snyder’s Lance, Inc. v. Frito-Lay North America, Inc.	65

CALI EXERCISE: [Distinctiveness](#) [40 minutes]

2. <i>The Distinctiveness Analysis of Nonverbal Marks</i>	<i>89</i>
a. Supreme Court’s Analysis of Distinctiveness.....	89
Wal-Mart Stores, Inc. v. Samara Bros., Inc.	97

b.	Distinguishing Product Packaging from Product Configuration	102
	In re Slokevage	103
	LVL XIII Brands, Inc. v. Louis Vuitton Malletier S.A.	106
	McKernan v. Burek.....	108
	Best Cellars, Inc. v. Wine Made Simple, Inc.....	109
c.	Analyzing the Inherent Distinctiveness of Product Packaging	110
	Amazing Spaces, Inc. v. Metro Mini Storage	112
	CALI EXERCISE: Introduction to Trade Dress Law [45 minutes]	
	CALI EXERCISE: Acquired Secondary Meaning [40 minutes] (optional)	
d.	Analyzing the Acquired Distinctiveness of Nonverbal Marks.....	118
B.	Bars to Protection.....	120
1.	<i>Functionality</i>	122
a.	Utilitarian Functionality.....	122
i.	TraffFix Devices, Inc. v. Marketing Displays, Inc.	125
ii.	Utilitarian Functionality Case Law after <i>TraffFix</i>	131
	Eppendorf-Netheler-Hinz GMBH v. Ritter GMBH.....	132
	Ezaki Glico Kabushiki Kaisha v. Lotte International America Corp.	135
	Valu Engineering, Inc. v. Rexnord Corp.....	142
b.	Aesthetic Functionality.....	144
i.	Foundational Cases	146
	Pagliero v. Wallace China Co.....	146
	Wallace Int'l Silversmiths, Inc. v. Godinger Silver Art Co.....	148
ii.	Aesthetic Functionality and the Apparel Fashion Industry	151
	Christian Louboutin S.A. v. Yves Saint Laurent America Holding, Inc.....	152
	CALI EXERCISE: Functionality [35 minutes]	
2.	<i>Deceptive and Deceptively Misdесcriptive Marks</i>	160
a.	<i>Non-Geographic</i> Deceptive and Deceptively Misdесcriptive Marks.....	160
b.	<i>Geographic</i> Deceptive and Deceptively Misdесcriptive Marks.....	162
3.	<i>Marks that May Falsely Suggest a Connection</i>	166
	In re Nieves & Nieves LLC.....	167
4.	<i>Confusingly Similar Marks Under Lanham Act § 2(d)</i>	174
5.	<i>Trademark Law and the First Amendment</i>	174
	Vidal v. Elster.....	175
	CALI EXERCISE: Bars to Federal Trademark Registration [45 minutes]	
C.	Use in Commerce as a Prerequisite for Trademark Rights	198
1.	<i>Use in Commerce as a Prerequisite for Federal Registration</i>	199
	Aycock Engineering, Inc. v. Airflite, Inc.....	200
	Couture v. Playdom, Inc.	206
2.	<i>Use in Commerce as a Prerequisite for Unregistered "Common Law" Priority</i>	208
	Comic Crusaders LLC v. Andrusiek	209
	CALI EXERCISE: The Role of "Use" in Trademark Law: An Overview [60 minutes]	

D. The Trademark Registration Process	219
1. <i>Benefits and Costs of Trademark Registration.....</i>	222
a. Registration on the Principal Register	222
b. Registration on the Supplemental Register.....	225
c. Costs of Trademark Registration	226
2. <i>Lanham Act § 1(b) Intent to Use Applications.....</i>	226
<i>Kelly Services, Inc. v. Creative Harbor, LLC</i>	227
3. <i>Process of Registration.....</i>	235
a. Application.....	235
b. Examination	236
c. Publication	237
d. Opposition and the Trademark Trial and Appeal Board	237
e. Registration.....	240
4. <i>Post-Registration Maintenance of the Registration</i>	240
5. <i>Notice of Federal Registration.....</i>	241
6. <i>Cancellation of Registration.....</i>	241
7. <i>The Madrid System.....</i>	243
CALI EXERCISE: <u>Incontestability</u> [30 minutes]	
E. The Geographic Extent of Trademark Rights.....	247
1. <i>The Geographic Extent of Rights in Unregistered Marks</i>	247
a. The <i>Tea Rose-Rectanus Doctrine Applied</i>	248
<i>Nat'l Ass'n for Healthcare Comms. v. Central Ark. Area Agency on Aging.....</i>	248
b. The Good Faith Standard in the <i>Tea Rose-Rectanus Doctrine</i>	253
<i>Stone Creek, Inc. v. Omnia Italian Design, Inc.</i>	253
2. <i>The Geographic Extent of Rights in Registered Marks.....</i>	258
a. Applications Filed on or after November 16, 1989	259
i. The Senior Common Law User Scenario.....	260
ii. The Intermediate Junior User Scenario	261
b. Applications Filed before November 16, 1989.....	262
c. Concurrent Use and Registration	263
d. The <i>Dawn Donut Rule.....</i>	266
3. <i>National Borders and Trademark Rights.....</i>	267
a. National-Border Limits on Trademark Rights	268
<i>Person's Co., Ltd. v. Christman</i>	268
b. The Well-Known Marks Doctrine	273
<i>Grupo Gigante SA De CV v. Dallo & Co., Inc.....</i>	273
CALI EXERCISE: <u>The Geographic Scope of Trademark Protection</u> [60 minutes]	
TRADEMARK INFRINGEMENT	284
A. The Actionable Use Requirement	286
1. <i>The Commercial Use Requirement</i>	287
<i>Radiance Foundation, Inc. v. NAACP</i>	288
2. <i>The "Use as a Mark" Requirement.....</i>	294

B. Confusion-Based Infringement	300
1. <i>The Development of the Modern Multifactor Test</i>	300
2. <i>Contemporary Applications of the Multifactor Test</i>	302
<i>Virgin Enterprises Ltd. v. Nawab.....</i>	303
3. <i>Various Uses of the Multifactor Test.....</i>	316
4. <i>Survey Evidence and the Likelihood of Confusion</i>	320
<i>Smith v. Wal-Mart Stores, Inc.....</i>	323
5. <i>"Sponsorship or Affiliation" Confusion</i>	338
<i>Int'l Info. Sys. Sec. Certification Consortium, Inc. v. Sec. Univ., LLC.....</i>	338
6. <i>Initial Interest Confusion</i>	347
<i>Select Comfort Corporation v. Baxter.....</i>	348
<i>Jim S. Adler, P.C. v. McNeil Consultants, L.L.C.....</i>	354
7. <i>Post-Sale Confusion.....</i>	362
<i>Ferrari S.P.A. v. Roberts</i>	363
8. <i>Reverse Confusion</i>	372
<i>Wreal, LLC v. Amazon.com, Inc.....</i>	373
9. <i>Reverse Passing Off</i>	390
<i>Dastar Corp. v. Twentieth Century Fox Film Corp.....</i>	393
10. <i>Lanham Act § 2(d) Confusion</i>	405
CALI EXERCISE: <u>Likelihood of Confusion</u> [45 minutes (skip longer fact pattern)]	
C. Trademark Dilution.....	408
1. <i>The Fame Requirement for Antidilution Protection</i>	414
<i>Coach Servs., Inc. v. Triumph Learning LLC.....</i>	414
2. <i>Dilution by Blurring.....</i>	420
<i>Nike, Inc. v. Nikepal Int'l, Inc.....</i>	420
3. <i>Dilution by Tarnishment</i>	431
<i>V Secret Catalogue, Inc. v. Moseley.....</i>	431
D. Cybersquatting	443
1. <i>The Section 43(d) Prohibition Against Cybersquatting</i>	443
<i>Sporty's Farm L.L.C. v. Sportsman's Market, Inc.</i>	443
<i>Lamparello v. Falwell</i>	452
2. <i>The Uniform Domain Name Resolution Policy</i>	457
E. Secondary Liability.....	461
1. <i>Service Provider Secondary Liability.....</i>	461
<i>Tiffany (NJ) Inc. v. eBay Inc.</i>	461
2. <i>Landlord-Tenant Secondary Liability.....</i>	474
<i>Luxottica Group, S.P.A. v. Airport Mini Mall, LLC</i>	474
DEFENSES TO INFRINGEMENT & LIMITATIONS ON TRADEMARK RIGHTS.....	480
A. Descriptive Fair Use	480
1. <i>Descriptive Fair Use and Consumer Confusion.....</i>	481
<i>KP Permanent Make-Up, Inc. v. Lasting Impression I, Inc.</i>	481
2. <i>The Three-Step Test for Descriptive Fair Use</i>	485

Solid 21, Inc. v. Breitling U.S.A., Inc.	485
SportFuel, Inc. v. Pepsico, Inc.	497
3. Various Descriptive Fair Use Analyses.....	504
International Stamp Art v. U.S. Postal Service.....	504
Bell v. Harley Davidson Motor Co.	505
Fortune Dynamic, Inc. v. Victoria's Secret	506
B. Nominative Fair Use.....	508
1. <i>The Three-Step Test for Nominative Fair Use.....</i>	508
Toyota Motor Sales, U.S.A., Inc. v. Tabari.....	509
Int'l Info. Sys. Sec. Certification Consortium, Inc. v. Sec. Univ., LLC.....	519
2. <i>More Analysis of Nominative Fair Use</i>	522
Liquid Glass Enterprises, Inc. v. Dr. Ing. h.c.F. Porsche AG.....	522
Toho Co., Ltd. v. William Morrow & Co., Inc.	523
Mattel, Inc. v. Walking Mountain Productions.....	525
C. Expressive Uses of Trademarks	528
1. <i>Expressive Uses and the Tests for Confusion and Dilution</i>	530
Louis Vuitton Malletier S.A. v. Haute Diggity Dog, LLC.....	530
2. <i>The Rogers v. Grimaldi Test for Unauthorized "Artistic" Uses</i>	542
Gordon v. Drape Creative, Inc.....	543
Jack Daniel's Props. v. VIP Prods. LLC	556
3. <i>Further Aspects of Expressive Uses and Trademark Dilution.....</i>	569
a. Noncommercial Expressive Uses.....	569
Mattel, Inc. v. MCA Records, Inc.....	570
b. What Qualifies as Parody?.....	571
Louis Vuitton Malletier, S.A. v. Hyundai Motor Am.....	572
Louis Vuitton Malletier v. My Other Bag, Inc.....	577
D. Trademark Abandonment.....	582
1. <i>Abandonment Through Cessation of Use.....</i>	582
ITC Ltd. v. Punchgini, Inc.	582
Crash Dummy Movie, LLC v. Mattel, Inc.	589
2. <i>Abandonment Through Failure to Control Use</i>	593
FreecycleSunnyvale v. Freecycle Network.....	593
CALI EXERCISE: <u>Abandonment</u> [45 minutes]	
E. Assignment in Gross.....	604
Sugar Busters LLC v Brennan.....	604
F. The First Sale Doctrine	609
Champion Spark Plug Co. v. Sanders	609

FALSE ADVERTISING	614
A. False Advertising Under the Lanham Act	614
1. <i>Literal Falsity</i>	616
S.C. Johnson & Son, Inc. v Clorox Co.....	616
2. <i>Literal Falsity by Necessary Implication</i>	625
Time Warner Cable, Inc. v. DIRECTV, Inc.	625
3. <i>Substantiation</i>	636
a. “Tests Prove” Claims.....	636
Castrol Inc. v. Quaker State Corp.....	637
b. Comparative Claims.....	643
Groupe SEB USA, Inc. v. Euro-Pro Operating LLC.....	644
c. False Demonstrations	652
Schick Mfg., Inc. v. Gillette Co.	652
B. Endorsements, Testimonials, and Reviews	662
In the Matter of Lord & Taylor, LLC	664
C. Special Restrictions on Lawyer Advertising & Endorsements.....	668
RIGHT OF PUBLICITY.....	669
A. State Right of Publicity Statutory Provisions.....	669
B. Right of Publicity Case Law.....	671
White v. Samsung Electronics America, Inc.....	671
In re NCAA Student–Athlete Name & Likeness Licensing Litigation.....	679