

EXPLICATING CORPORATE HERITAGE, CORPORATE HERITAGE BRANDS, AND ORGANISATIONAL HERITAGE

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Abstract

Recently, considerable academic and management interest has focussed on corporate heritage and, in particular on the corporate heritage brand notion. This article provides a thorough overview of the field and includes latest developments in the territory including the formal introduction of the organisational heritage concept. In this paper the contexts, foundations, fundamentals, and advances in the broad corporate heritage field are outlined. This critique also examines key constructs within the domain including corporate heritage brands, corporate heritage identity, and organisational heritage. Both theoretical and managerial aspects of the field are addressed. Drawing on the extant literature, the article explores five themes relating the area: contexts, foundations, fundamentals, advances, and empirical insights. Reference is made to prominent case study research from Great Britain and China namely Shepherd Neame (Britain's oldest brewery with an official founding date of 1698), and Tong Ren Tang (the renowned traditional Chinese medicine corporate brand dating back to 1669).

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INTRODUCTION

Recently, there has been a good deal of interest in the corporate heritage notion and advances in the field have been quite marked. As such, this short article aims to be of utility to marketing, branding and, more generally, management scholars and practitioners who wish to be apprised of key insights and developments in the broad corporate heritage field.

To date, the nascent field of corporate heritage scholarship has largely been concerned with the conceptual and instrumental relevance of corporate heritage for corporate branding (*corporate heritage brands*), corporate identity (*corporate heritage identity*) and corporate marketing (*corporate heritage marketing*) etc. Not surprisingly, as the area grows in maturity this has generated a great deal of interest recently and the number of empirical contributions is growing.

As such, although succinct, our article is much more than a *tour d'horizon* of the corporate heritage field. It does, we hope, provide the readership of *JBM* with a comprehensive overview of the “*state of the art*” of the field whilst – at the same time – explores future possibilities in terms of corporate heritage research and management. More specifically, the aims, focus, and structure of this article on corporate heritage are fivefold:

- *first*, by means of context, we briefly examine the significance of the temporal dimension *vis-a-vis* corporate brands, corporate identities within corporate marketing thought;
- *second*, we revisit the pivotal work of Balmer, Greyser and Urde who jointly developed the corporate heritage and corporate heritage brand notions as expounded in two *JBM* articles (Balmer *et al* 2006; Urde *et al* 2007);
- *third*, by drawing on extant corporate heritage scholarship, the fundamentals of corporate heritage identity are specified. This is significant since an understanding of corporate heritage identities facilitates the delivery of corporate brand promises;
- *fourth*, critical advances of the territory are detailed including taxonomies linked to corporate heritage; the identification of new theoretical perspectives *vis-à-vis* corporate heritage and the introduction and explication of the *organisational heritage concept* (which draws on the corporate heritage, organisational identity, and organisational memory literatures);
- *fifth*, drawing on recent empirical research on two celebrated corporate heritage entities/corporate brands based in Great Britain namely Shepherd Neame – Britain’s oldest brewery (established in 1698†) and, arguably, China’s most famous corporate heritage brand – Tong Ren Tang, the traditional Chinese medicine company (established in 1669).

In detailing the above we make particular reference not only to our own work but also recent research and scholarship undertaken on the domain by scholars from Continental Europe, Australia, and North America.

A cautious reminder is warranted at the outset of this article.

Marketing scholars and practitioners need to exert particular care when approaching the heritage territory in a branding and marketing context taking note of at least three principle differences.

First, the nature, characteristics, and management of product brands are fundamentally different from corporate brands: see Balmer (2001) and Balmer and Gray (2003). Thus, although scholars have considerably advanced our discernment of brand heritage at the product/service-level (Aaker, 1996, 2004; Berthon *et al* 2003; Keller, 2001, Keller and Lehmann 2006; Banerjee 2008; Hakala *et al* 2011; Wiedmann *et al* 2011a, 2011b; Merchant and Rose 2013) these insights are not always readily applicable to corporate heritage brands - and to corporate-level marketing concerns in general. This is because at the corporate-level it is imperative for an explicit corporate marketing perspective to be adhered to (see Balmer 1998; Balmer and Greyser 2006; Balmer 2011c), which requires an understanding of brands beyond products and services and beyond a sole customer and market orientation. After all, corporate brands are constituted within a much broader institutional context and *vis-à-vis* multiple societal domains (market/non-market) and stakeholder groups (see Balmer and Gray 2003). In that sense, the concept of brand heritage (as it refers to product/service brands) is more restricted and limited in comparison to corporate heritage.

Second, as argued above, corporate heritage is a particular concept that refers to an organisation's heritage which may or may not be utilised as a basis for corporate heritage branding. It is as such also different from the marketing of cultural heritage sites, landscapes, artefacts, or practices *per se* (for example, as defined by the UNESCO). This being said, there might be instances where certain organisations acquire such cultural significance that they also constitute cultural heritage for a community, region, nation, or the world (arguably, the British Monarchy is a corporate heritage institution as much as it is part of the broader cultural heritage of the UK and beyond).

Third, and finally, corporate heritage as a branding and marketing concept is not simply a synonym for the past or history (see Urde *et al* 2007; Balmer 2011a; Burghausen and Balmer 2014b).

In light of the above, we include definitions of three key constructs that have been discussed in the corporate heritage scholarship domain so far.

Corporate heritage identity

Corporate heritage identity was originally defined as follows:

“Corporate heritage identities should be viewed as a distinct identity type. Corporate heritage identities refer to those institutional traits which have remained meaningful and invariant over the passage of time and, as such, a corporate heritage identity viewed as being part of the past, present and future. This said, the meanings attached to particular facets of an institution’s identity can vary with the passage of time. Heritage identity traits can include corporate competencies, cultures, philosophies, activities, markets and groups etc. and may find, in addition, expression in distinctive visual identities, architecture and service offerings.” (Balmer 2011a, p.1385)

Corporate heritage brands

Within the corporate marketing scholarship a distinction is made between corporate identities and corporate brands. As such, a corporate heritage brand – mindful of the cornerstone article on corporate heritage brands (Balmer *et al* 2006) – can be defined as follows:

“... a distinct category of institutional brands where there is a degree of continuity in terms of the brand promise as expressed via the institution’s identity, behaviour, and symbolism. The temporal dimension is a key aspect of the previous (mentioned facets) with corporate heritage brands being seen to have a meaningful past, present and prospective future: they inhabit all the aforementioned time frames. Moreover, corporate heritage brands-in order to remain salient-need to be relevant and respected and, in addition, should be sclerotic but should be capable of adaptation in short, to be responsible to change. (Balmer 2011a, p. 1385)

Corporate heritage

A more recent definition of corporate heritage *per se* – which takes cognisance of developments in the field and beyond – has been articulated as follows:

“... all the traits and aspects of an organisation that link its past, present, and future in a meaningful and relevant way. Thus, it refers to some aspect of an organisation’s past that is still deemed by current

internal and/or external stakeholders to be relevant and meaningful for contemporary concerns and purposes but concurrently perceived as worth to be maintained and nurtured for future generations; it is the selectively appropriated and valorised past of a company or ‘all that is (still) relevant’ in the light of contemporary concerns and purposes” (Burghausen and Balmer 2014b, pp. 394-95).

As such, corporate heritage brands and identities predicated on corporate heritage (understood in this way) constitute a specific category of brand/identity altogether with their particular characteristics, management requirements and impact *vis-à-vis stakeholders*.

The structure of this article is detailed in Figure 1.

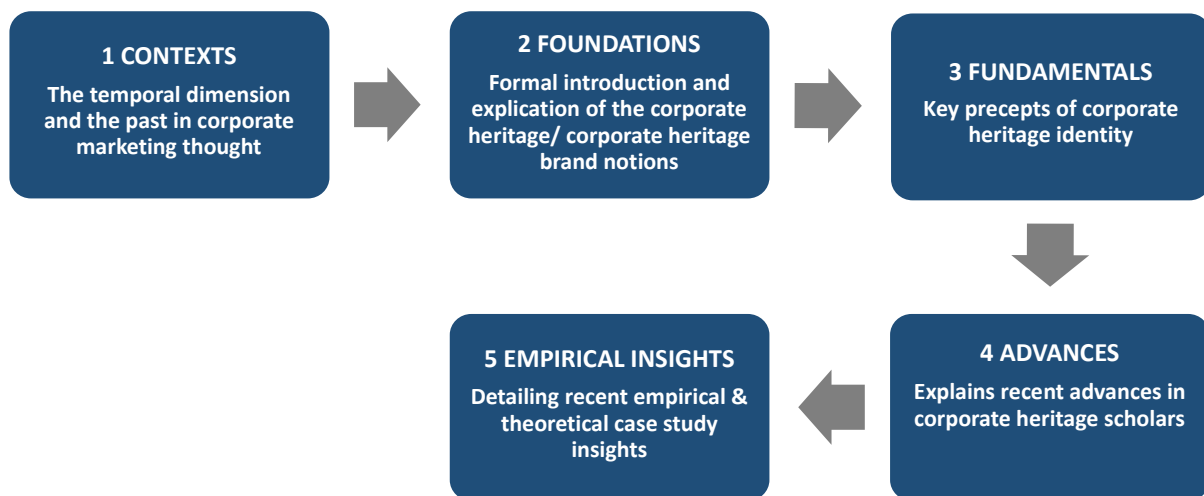


Figure 1: Structure of Article

1 CONTEXTS. THE TEMPORAL DIMENSION AND THE PAST WITHIN CORPORATE MARKETING THOUGHT

The importance of the past in marketing and branding scholarship – and more particularly corporate marketing scholarship – is recognised to be highly significant (Balmer 1994; Moingeon and Ramanantsoa 1997; Balmer and Greyser 2006; Melewar and Karaosmanoglu 2006; Blombäck and Brunninge 2009). This being said, and as is to be expected from a nascent field, empirical insights on the domain are still modest.

As an aside we note that ‘the past’ – as with history – is often contested, constructed, made and re-made in light of present instrumental concerns, socio-psychological requirements and broader societal sentiments as variously noted, for example, by Mead (1932), Koselleck (1979), Hobsbawm (1983), or more recently Zerubavel (2004) and Ricoeur (2006). However, in terms of Business History we are also mindful of the work of Chandler who persuasively showed how business history can be of material importance to strategy and identity (Chandler 1962).

A review of the literature reveals two dominant interpretations of ‘the past’ within the extant corporate marketing literatures; namely: the past as a constitutive element and the past as a contingency factor *vis-à-vis* corporate-level phenomena. By means of context, Editorial Box 1 provides an overview of the above and also includes Figure 2 which schematically synthesises these understandings of the past that can be deduced from the existing corporate marketing literature.

INSERT EDITORIAL BOX 1 HERE

The above being noted, the importance of the past and of the temporal dimension *vis-à-vis* corporate identities and corporate brands has only fairly recently (since the mid-1990s) attracted a dedicated scholarly interest with the work of Balmer, Greyser and Urde on corporate heritage brands (Balmer *et al* 2006; Urde *et al* 2007) and Balmer’s seminal work on corporate heritage identity (Balmer 2011a, 2013) and more recent empirical and conceptual work on the same of Burghausen and Balmer (2014a, 2014b, 2015) and Balmer and Chen (2015) being noteworthy too.

As such, corporate marketing scholars recognise how the temporal dimension (especially the notion of omni-temporality encompassing at once past, present and future) is not only a key precept of corporate marketing thought (Balmer and Greyser 2006). There is a growing consensus, and recognition, that the past plays a meaningful role in the constitution of corporate heritage brands (Balmer *et al* 2006; Urde *et al* 2007; Balmer 2011b) and of corporate heritage identities (Balmer 2011a; Burghausen and Balmer 2014a, 2015) as specific types of corporate brands/identities, which warrant further scrutiny (Blombäck and Brunninge 2009; Balmer 2011a, 2013; Hudson, 2011).

2 CORPORATE HERITAGE: FOUNDATIONS

As noted above, marketing interest in heritage as a conceptual category is a comparatively recent phenomenon, viz.: brand heritage (Aaker 1996); corporate heritage brands (Balmer *et al* 2006); heritage marketing (Misiura 2006); corporate heritage identities (Balmer 2011a) and corporate heritage marketing (Balmer 2013). Not surprisingly, the heritage construct has been understood and defined in a variety of different ways and these are detailed in Editorial Box 2.

INSERT EDITORIAL BOX 2 HERE

More generally, the broad notion of heritage has generated a good deal of interest from scholars from a variety of disciplines outside of marketing and business and management that increasingly inform corporate heritage scholarship (see Balmer 2013; Burghausen and Balmer 2014b).

Yet, two *Journal of Brand Management (JBM)* articles are of pivotal importance in providing the foundations for the corporate heritage domain, and more specifically, for the corporate heritage brand construct. Both were written by a triumvirate of scholars from England, the USA and Sweden: Balmer, Greyser and Urde.

The first *JBM* article (Balmer *et al* 2006) formally introduced the corporate brand notion and detailed core requisites of corporate heritage brands. The second *JBM* article developed the above insights and introduced an initial corporate heritage brand framework (Urde *et al* 2007). In addition, a 2009 *Management Decision* article tackles the issue of the management of corporate heritage brands (Balmer 2009) and this will also be discussed next.

The formal introduction of the corporate brand notion (Balmer, Greyser and Urde 2006)

It is in the concluding section of this *JBM* article on monarchies where the corporate heritage brand construct was formally introduced and some core precepts of corporate brands were identified. The article is, arguably, of seminal importance because these scholars:

- Noted the significance of the temporal dimension *vis-à-vis* corporate heritage brands: corporate heritage brands are of the past, present and future;

- Noted the value of corporate heritage brands that are stable points of reference in a changing world and help to define peoples and places (in terms of “giving identity”).

In addition, this first article on the area noted – and offered advice – how corporate heritage brands should be managed (see Figure 3 below):

- Senior managers in managing corporate heritage brands should be mindful of the past, present and future;
- Senior managers should take care not to wear out brand symbols;
- Senior managers should ensure that a corporate heritage brand’s emotional bases are built on and/or refreshed (so that it remains relevant for customers and other stakeholders);
- Senior managers should balance a corporate heritage brands values so that they speak to the present (thus accommodating the need for change).

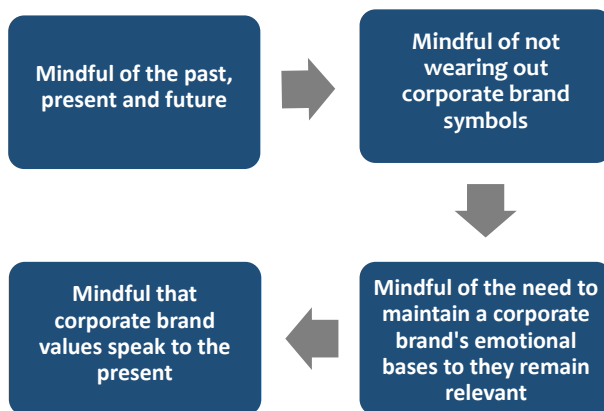


Figure 3: Initial explanation of key dimension of corporate heritage brand management (from, Balmer, Greyser and Urde 2006)

The detailed discussion of the Corporate Heritage Brand notion (Urde, Greyser and Urde 2007)

A year later, the same group of scholars built on their initial formal discussion of the corporate heritage brand construct in a second seminal article in the *JBM*. Making reference to a wide variety of industry examples these authors further developed their earlier musings on corporate heritage brand management through their introduction of the heritage quotient. In this article they also distinguished between *a corporate heritage brand* and *a corporate brand with a heritage* while noting their potential in conferring strategic value. As such this article is significant in that it:

- Provided an initial five-part framework detailing the dimension of a corporate heritage brand (“the heritage quotient”) which encompassed track record, longevity, core values, use of symbols and an institutions’ belief that its’ history is important; see Figure 4 below.
- Made a distinction between a corporate heritage brand and a corporate brand with a heritage. The former (corporate heritage brand) relates to institutions that emphasise their heritage as part of its corporate brand identity. The latter (corporate brands with a heritage) relates to those entities who have decided not to do this. Or, as pointed out by Balmer (2013 p.299) who have this default position through ignorance – where senior managers are unaware that they have a corporate heritage.
- Noted how corporate heritage brands can have strategic value. The authors argued that senior managers can harness and employ a corporate heritage brand to considerable strategic effect. However, they warned that corporate heritage brands are not necessarily valuable in strategic terms by default but only provide the opportunity to accord strategic value to the firm.

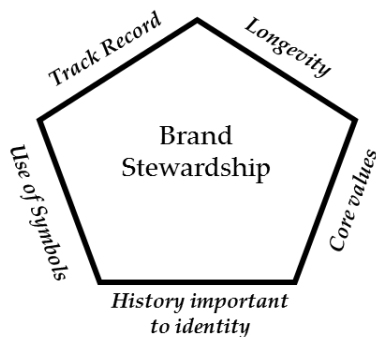


Figure 4: The heritage quotient framework (Urde, Greyser and Balmer 2007)

The Management of Corporate Heritage Brands (Balmer 2009)

In this article it was argued that senior management could better discern their corporate heritage brand and its management by engaging in a five-stage process entitled “*Chronicling Corporate Heritage Brands.*” Balmer (2009) suggested further that the management of the British Monarchy as a corporate heritage brand involved three additional royal responsibilities that were deduced from six key normative insights derived from his scrutiny of the monarchy as a corporate brand. These dimensions are also multi-disciplinary in scope and build off his earlier model of corporate heritage as it pertained to the British Monarchy – the Monarchical Mix Framework (Balmer 2004, 2008).

3 FUNDAMENTALS: THE KEY PRECEPTS OF CORPORATE HERITAGE IDENTITIES (Balmer 2011a, 2013)

Within the corporate marketing canon it has been argued that corporate identity and corporate brands are inextricably linked (Balmer 1995). Corporate brands develop out of corporate identities so that a corporate brand becomes equated to a corporate brand covenant/promise. But even where a corporate brand has become established it is through the corporate identity (based on an organisation's defining and distinguishing traits) that the corporate brand covenant/promise is delivered. As such, the need to identify the key facets of corporate heritage identities became an imperative.

The corporate heritage identity notion was formally introduced in an article by Balmer in 2011 (Balmer 2011a). It examined the notion that heritage institutions have certain identity traits that were perennial.

Also, this article explained that one reason that corporate heritage identities could be highly meaningful was because they were imbued with “*multiple role identities*”. As such, they are invested with additional identities associated with – among others – people and places. Because of this, heritage institutions can confer identities to peoples, places, communities and cultures.

In addition, the article also introduced the theoretical notion of *relative invariance*. As such, although heritage organisations might appear to be *invariant* they are likely in fact to be *variant*.

Finally, Balmer argued that a key dimension of a relevant and meaningful corporate heritage identity is bi-lateral trust. Therefore, there should be authenticity on the part of the corporate heritage institution and affinity on the part of customers and other stakeholders. See Figure 5 below.

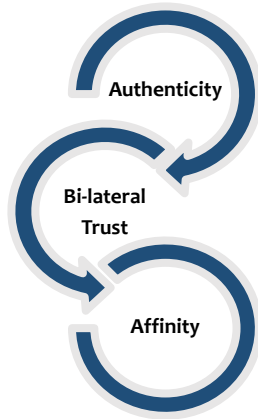


Figure 5: Corporate Heritage the importance of authenticity, affinity and bi-lateral trust (Balmer 2011a)

In 2013 a further development took place *vis-à-vis* articulating the foundations of corporate heritage identities when six fundamental criteria were articulated (Balmer 2013). Criteria one to four adopt explicit customer, stakeholder and organisational foci and criteria five and six are more instrumental: they detail corporate heritage management imperatives (these are denoted with an asterisk*; criterion 5 bridges both). They can be detailed as follows and are shown in Figure 6

- **Omni-temporality** (*subsisting in temporal strata-of the past, present and prospective future*)
- **Institutional trait consistency** (*the continuity of meaningful organisational traits*)
- **Tri-generational hereditary** (*the organisation has to have been in existence, and meaningful, for a minimum of three generations*)
- **Augmented role identities** (*corporate heritage institutions are infused with multiple role identities including territorial, cultural, social and ancestral identity*)
- **Ceaseless multigenerational stakeholder utility** (*demonstrably salient for consecutive generations of stakeholders*)
- **Unremitting management tenacity** (*assiduous management of corporate heritage institutions*)

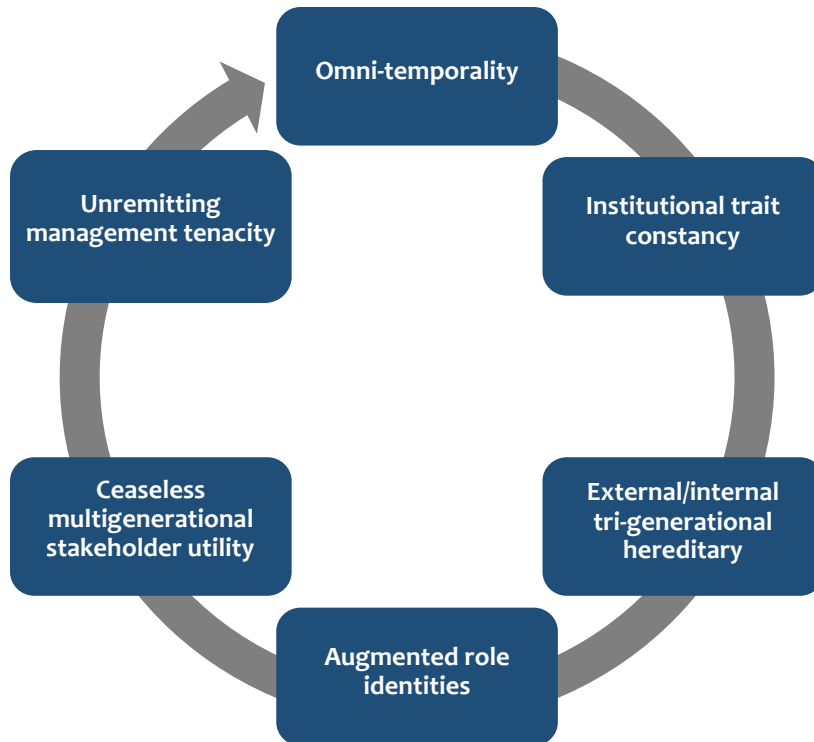


Figure 6: Corporate Heritage Identities Fundamentals (Balmer 2013)

(THIS MODEL SHOULD BE LARGER THAN EARLIER ONES OWING TO ITS IMPORTANCE: THANK YOU)

4 CRITICAL ADVANCES IN SCHOLARSHIP

In recent years there has been a meaningful advance in terms of scholarship in the context of the introduction and explanation of taxonomies of past-related corporate marketing concepts delineating them from corporate heritage *per se* (Balmer 2011a; Burghausen and Balmer 2014b) and the detailing of latent theoretical advances (Balmer 2013).

In other words, the recent literature on corporate heritage scholarship has been strengthened not only by drawing on insights from other disciplines but also by drawing on extant theories.

For example, the work of Mead has been examined in terms of its conceptual and theoretical utility in terms of the consumer relevance of heritage (Hudson and Balmer 2013), while Balmer (2011a) and Burghausen and Balmer (2014b) recently expanded the conceptual framework of distinct but related

temporal corporate-level marketing constructs by drawing on the wider social science and humanities literatures.

Corporate heritage within a repertoire of past-related corporate-level concepts

As such, within the canon of corporate heritage scholarship a conceptual differentiation was made between foundational and instrumental past-related concepts (Burghausen and Balmer 2014b). The latter refer to applied concepts such as corporate heritage brands and corporate heritage identities as being different from other marketing concepts such as retro brands or history marketing that all in various ways utilise and appropriate the past (see: Balmer 2011a). However, the articulation of seven interrelated foundational temporal concepts within corporate marketing *per se* and their delineation from each other and from corporate heritage represents an important and seminal conceptual leap within the field of corporate heritage scholarship (see: Balmer 2011a; Burghausen and Balmer 2014b). These are outlined below (derived from Burghausen and Balmer 2014b):

- *Corporate Past*: refers to ‘the past’ of an organisation *per se* or ‘all that ever happened’ that can be variously be a discovered, rediscovered, invented, and appropriated past based on available sources and traces of the past;
- *Corporate Memory*: refers to the remembered and forgotten past of an organisation (cognitive and cultural forms of memory alike) or ‘all that is currently known’ about it which is predicated on processes of commemoration and interpretation of the available sources and traces of the past (which also includes their wilful or inadvertent deletion or suppression);
- *Corporate History*: refers to the narrated and storied past of an organisation or ‘all that is told’ about it which is derived from the culturally and socially shared corporate memories making them accessibly as a sequence of events and constituting a particular genre of representing the past (not only in the form of text);
- *Corporate Tradition*: refers to the enacted and embodied past or ‘all that is done’ in reference to the past which makes it accessible in an existential and experiential form based on shared practices;
- *Corporate Nostalgia*: refers to the emotive past of an organisation or ‘all that is felt’ about it which can constitute a positive or negative predisposition toward the past by individuals but also groups based on direct or vicarious memories and experiences;
- *Corporate Provenance*: refers to the past of an organisation that is spatially and culturally situated or ‘rooted’ *vis-à-vis* an origin (actual or mythical) which can also refer to persons (e.g. founders);
- *Corporate Heritage*: refers to the appropriated and valorised past of an organisation or ‘all that is still relevant’ in light of present concerns and future generations.

Corporate heritage marketing and total corporate heritage communications notions

The rapidly developing corporate heritage domain clearly raises questions because of its corporate-level focus; as to its links with corporate marketing. Not surprisingly, perhaps, this led to the formal introduction of the corporate heritage marketing and total corporate heritage communications notions. Corporate heritage marketing was delineated as follows:

“Corporate heritage marketing is an organisational-wide philosophy which is underpinned by a multi-generational focussed, customer, stakeholder, societal and CSR/ethically focussed ethos. It is enacted and created over successive generations and should broadly meet a tri-generational criterion.” (Balmer 2011, p. 1345).

Total corporate heritage marketing communications (Balmer 2013, pp. 317-320) encompasses primary, secondary, tertiary, legacy corporate heritage communications (internal and external):

- *Primary corporate heritage communications:* omni-temporal effects of products, services, management and employee actions etc.;
- *Secondary corporate heritage communications:* omni-temporal effects of controlled corporate communications (corporate advertising, corporate PR, etc.);
- *Tertiary corporate heritage communications:* omni-temporal effects of third party communications by third parties;
- *Legacy corporate heritage communications:* the multi-generational and omni-temporal communications. Notes that corporate heritage communications can be bequeathed and inherited and certain groups may see themselves as custodians of an institution’s heritage communications.

Internal heritage communications encompasses multi-generational and omni-temporal internal corporate heritage communications on the part of managers and organisational managers and to families (in family-owned businesses) while external corporate heritage communications relates to customers and other stakeholder groups in a similar means to the above.

Corporate heritage: impending theoretical advances

Balmer (2013) in contemplating future research directions for the corporate heritage domain advocated garnering theoretical insights not only from management theories but also those grounded in philosophy, sociology, anthropology and psychology along with those underpinning nationality and nationalism.

In terms of extending extant management theories 10 prospective corporate heritage theories were identified by him. See Figure 7.



Figure 7: Prospective Corporate Heritage Theories (From Balmer 2013)

Social identity theory and the advent of the organisational heritage notion

One significant development in the field has been the recognition of the importance of social identity to the field. Of course, social identity theory has previously informed marketing scholarship (e.g., Bhattacharya and Sen 2003). Of particular note has been its application in the context of corporate brands (Balmer and Liao 2007; Balmer *et al* 2010). In corporate heritage contexts it has already been noted that corporate heritage social identity theory represents a potentially highly valuable line of inquiry (Balmer 2013). This indicates a potentially much broader applicability and relevance of the heritage concept in organisational and institutional contexts. An obvious outcome of the above is the *organisational heritage* notion (organisational heritage identity and organisational heritage identification) and this was initially mentioned in Balmer and Chen (2015 p.202) and was further elaborated and formally introduced in Balmer and Burghausen (2015).

In the development of a field the introduction and elaboration of key concepts is an important means through which an area can progress and the explication of the nature/s of organisational her-

itage is, therefore, of importance. In short, the organisational heritage notion scrutinises the corporate heritage field from the perspective of organisational members (employees and managers) and embraces certain philosophical and theoretical perspectives.

Organisational heritage

In explicating organisational heritage Balmer and Burghausen (2015) meaningfully and substantially develop and advance the observations made by Balmer and Chen (2015 p.202) who stated:

“The significance of heritage to organisational members of the broad corporate heritage notion opens extant corporate marketing scholarship on the territory to scholars within the organisational behaviour field. As such, the extant concepts of organisational identity, organisational identification can be adapted within a corporate heritage context viz: organisational heritage/organisational heritage identities and organisational heritage identification”. (Balmer and Chen 2015, p.202)

As noted by Balmer and Burghausen (2015), whilst, to date, advances in heritage studies at the institutional level have primarily taken place within the broad corporate marketing paradigm in terms of *corporate heritage*, we are mindful of developments in the *organisational identity* and *organisational memory* fields. Thus, all three literatures (*corporate heritage*, *organisational identity*, and *organisational memory*) are marshalled by Balmer and Burghausen (2015) in explaining organisational heritage.

For that purpose Balmer and Burghausen (2015) draw on the aforementioned literatures and distinguish between three foundational perspectives on organisational heritage and, arguably, their formal introduction and explanation of organisational identity represents a significant advance in the domain:

1. *Organisational heritage identity* refers to perceived and reminisced omni-temporal traits – both formal/normative and utilitarian/societal – of organisational members’ work organisation.
2. *Organisational heritage identification* refers to organisational members’ identification/self-categorisation vis-à-vis the perceived and reminisced omni-temporal traits – both formal/normative and utilitarian/societal – of their work organisation.
3. *Organisational heritage cultural identification* refers to organisational members’ multi-generational identification/self-categorisation with the perceived and reminisced omni-temporal traits – both formal/normative and utilitarian/societal – of their work organisation’s corporate culture.

These foundational precepts of organisational heritage potentially inform three distinct perspectives on organisational heritage that may over time, they argue, constitute different schools-of-thought.

Balmer and Burghausen (2015) differentiate:

- *Organisational heritage identity*: this first school-of-thought denotes organisational heritage identity traits which refer to a corporate heritage identity (heritage organisation) and which organisational members perceive/claim to be central, distinctive and enduring (as ideational and/or material traits).
- *Organisational heritage identification*: this second school-of-thought denotes the process of an omni-temporal identification/self-categorisation vis-à-vis a corporate heritage identity (heritage organisation) by organisational members which is predicated on their joint appropriation and valorisation of the organisational past into heritage (as a process and practice).
- *Organisational heritage cultural identification*: this third school-of-thought denotes the process of an omni-temporal identification by multi-generational organisational members with a corporate heritage culture which is predicated on their joint appropriation and valorisation of the organisation's cultural past into heritage.

The explication of the organisational heritage notion is significant because there is gap in the current conceptual discussions of past-related concepts within organisation and management studies. While extant conceptualisation either focus on the *past and present* or the *present and future*, the organisational heritage notion is predicated on an omni-temporal perspective – *past, present and future* – (Balmer *et al.* 2006; Urde *et al.*, 2007; Balmer 2011a) that integrates retrospective and prospective sense-making and sense-giving within organisations (see Balmer and Burghausen 2014b, 2015).

A focus on the organisational heritage notion, thereby, can meaningfully complement corporate heritage marketing insights and has the potential to make a potentially highly valuable contribution to the wider business and management literature in theoretical and empirical terms. It also highlights the cross-disciplinary and multi-theoretical nature of corporate heritage as a concept and field of scholarly work.

Managerial relevance

Whilst the importance of the theoretical aspects and possibilities will be of interest to scholars, there is much in the recent literature on the territory which recommends itself to managers. Indeed, from

the outset, the significance of the instrumental aspects of the field was emphasised (Balmer *et al* 2006; Urde *et al* 2007; Balmer, 2009).

What becomes clear in reviewing the literature is how corporate heritage scholarship has also extended our understanding of the instrumental relevance of corporate heritage and its interdependence with other marketing activities and approaches.

For example, the literature has illustrated the applicability and impact of corporate heritage in terms of:

- strategic brand repositioning and rejuvenation (Balmer 2009; Hudson 2011);
- burnishing customer satisfaction (Balmer and Chen, 2015)
- monarchical management (Balmer *et al* 2006; Balmer 2009, 2011a, 2011b)
- corporate communication and corporate identity management (Blombäck and Brunninge 2009; Balmer 2013);
- corporate communication strategies of family businesses and SMEs (Byrom and Lehman 2009; Micelotta and Raynard 2011; Blombäck and Brunninge 2013);
- CSR communication (Blombäck and Scandellius 2013);
- consumer brand image formation (Wiedmann *et al* 2011a, 2011b);
- its impact on corporate reputation (Wiedmann *et al* 2013);
- consumer nostalgia and emotional brand perceptions (Merchant and Rose 2013);
- place branding and name changes (Hakala *et al* 2015);
- luxury brands and the co-creation of brand meaning (Schroeder *et al* 2015);
- a multi-institutional phenomenon amongst a federation of corporate brand stakeholders (Urde and Greyser, 2015).

Other studies have illustrated the conceptual difference – and a substantive overlap – between corporate heritage and cultural heritage (Banerjee 2008; Hakala *et al* 2011; Balmer and Chen 2015; Schroeder *et al* 2015) as well as the difference between corporate heritage and non-corporate heritage *per se* (Urde *et al* 2007).

Geographic scope

Whilst the corporate heritage domain is still comparatively new, empirical and instrumental insights are global in scope. Empirical studies have researched the phenomenon of corporate heritage as a global issue (e.g., Urde *et al* 2007; Balmer 2009, 2011b; Micelotta and Raynard 2011; Cooper *et al* 2015b; Urde and Greyser, 2015) and in diverse geographical settings including:

- Australia (Byrom and Lehman 2009; Cooper et al 2015a);
- China (Balmer and Chen 2015; Schroeder et al 2015);
- France (Bargenda 2015);
- Finland (Blombäck and Brunninge, 2009; Hakala et al 2011; Hakala et al 2015);
- Germany (Wiedmann et al 2011a, 2011b; 2013);
- Italy (Rindell et al 2015);
- New Zealand (Cooper et al 2015a);
- Norway (Urde and Greyser, 2015);
- Portugal (Rindell et al 2015);
- Sweden (Balmer et al 2006; Blombäck and Brunninge, 2009, 2013; Blombäck and Scandelius 2013; Urde and Greyser, 2015);
- United Kingdom (Balmer 2008, 2009, 2011a; Burghausen and Balmer 2014a, 2015);
- US (Hudson 2011; Balmer and Hudson 2013).

5 RECENT EMPIRICAL INSIGHTS

More recently, as reflected in this special edition, a number of empirical studies have variously advanced our discernment of the domain by examining how two corporate heritage brands – Tiffany’s and Burberry – recovered from brand crises (Cooper et al 2015b) and a study of the Vespa brand (Rindell et al 2015) explains the significance of the *consumer-based corporate image heritage* notion (Rindell 2013) in the context of the heritage quotient framework (Urde, Greyser, and Balmer 2007). The material and spatial manifestation of corporate heritage through corporate heritage architecture of French financial institutions is the focus of another recent contribution (Bargenda 2015) while Cooper et al (2015a), building on the work of Urde et al (2007), detail the differences between the management of established corporate heritage brands with the management approach of contemporary corporate brands lacking the corporate heritage dimension.

See Editorial Box 3 which explains the nature and significance of the above research insights in more detail.

Corporate Heritage Brand insights from Great Britain and China

In the remainder of this section we make reference to our own research and detail two substantive empirical studies which we believe have delivered significant insights, which further buttress and extend corporate heritage scholarship. The cases both focus on organisations whose roots date back to the late 17th Century: the first relates to a British, family-owned, brewery company (*Shepherd*

Neame) and the second focuses on China's most-famous traditional Chinese medicine companies (*Tong Ren Tang*).

Shepherd Neame (Great Britain): founded in 1698†

Shepherd Neame is Great Britain's oldest brewer and is one of the UK's oldest commercial entities. The study – the first of its kind – focused on the relation between managerial social cognitions and corporate heritage identity implementation and enactment (Burghausen and Balmer 2014a, 2015).

This prolonged empirical inquiry identified the multi-modal nature of corporate heritage identity implementation and its management. The research highlighted particular corporate heritage implementation patterns that conflate temporal similarity and difference; further detailing the general principle of *relative invariance* (Balmer 2011). These findings were synthesised into a generic management framework of four generic management activities and four implementation strategies (see: Burghausen and Balmer 2014a).

The study's findings further substantiated the notion of corporate heritage identity stewardship as a particular approach to the management of corporate heritage identities predicated on extended fiduciary responsibilities for managers due to the perceived wider societal relevance of corporate heritage identities. In particular the study resulted in an integrated theoretical framework of three managerial awareness dimensions that are underpinned by six management dispositions to think feel and act (see: Burghausen and Balmer 2015).

Tong Ren Tang (China): founded in 1669

Tong Ren Tang (TRT) is arguably, the most celebrated and quintessential of all China's corporate heritage brands. Not only is it celebrated in the Middle Kingdom but throughout the Chinese diaspora to. In this study the broader cultural and social appeal of corporate heritage brands and identities has been a focus of another recent empirical inquiry (Balmer and Chen 2015). The study of Tong Ren Tang – arguably the Chinese heritage brand – further corroborates the notion of multiple role identities of corporate heritage identities and other corporate heritage identity criteria (Balmer 2011a, 2013). For instance, it reveals how not only the company's heritage but also China's imperial heritage with which the brand is associated is of importance (for several hundred years until the proclamation of a republic in 1911 Tong Ren Tang was the official purveyor of medicine to the Chinese

Emperor). The research reveals the extended symbolic relevance of such corporate heritage-based institutions for consumers within a much wider institutional and societal context (see: Balmer and Chen 2015). As such, the research insights are of practical relevance for the management of TRT as a corporate heritage entity/corporate heritage brand.

Significance of both studies

Both studies lend support not only to the instrumental efficacy of corporate heritage as a strategic resource for corporate identity/corporate heritage identity and corporate brand/corporate heritage brand management but also their relevance as markers of individual and collective identities within (Burghausen and Balmer 2015) and without the focal organisation (Balmer and Chen 2015). In addition, these two recent empirical studies – along with other recent contributions indicate the empirical relevance and the conceptual necessity of a multi-disciplinary approach to corporate heritage scholarship and corporate heritage management scrutinised from multiple theoretical vantage points.

6 REFLECTION

Our scrutiny of the growing literature in the area of corporate heritage scholarship reveals a substantial broadening of the field's foundations and relevance in multiple ways.

The growing empirical literature increasingly provides substantive support for the key conceptual precepts of corporate heritage brands and identities as articulated by the foundational contributions outlined earlier in this commentary. More importantly, this emerging body of literature also opens up and, will no doubt, presage new developments and directions in the corporate heritage field. In addition, future conceptual refinements and further empirical inquiries are likely to build on and expand the extant literature. In addition, there is now a real possibility for the nascent field of corporate heritage scholarship to meaningfully contribute to and being open to influence from other disciplines and theoretical perspectives. This is particularly the case with regard to the organisational heritage notion which has recently been examined in detail (Balmer and Burghausen 2015).

Consequently, future scholarly work in the area is required that further expands on the extant literature in terms of seven principle dimensions:

1. *Conceptual* (further specification of frameworks and categorisations: foundational and instrumental constructs/frameworks and their dynamics/connections)
2. *Empirical* (further diversification into and cross-sectional/longitudinal comparison between different contexts: institutional, cultural, geographic etc.)
3. *Instrumental* (further evaluation of managerial and non-managerial purposes and multi-level impacts: economic, social, cultural etc.)
4. *Theoretical* (further elaboration of multiple base theories and assumptions: see Figure 7 and Balmer 2013 and moreover the development of new theoretical perspectives)
5. *Methodological* (further pluralisation of research paradigms and approaches: qualitative, quantitative, mixed-method; positivist, interpretive, critical etc.)
6. *Disciplinary* (further examination/exploration of corporate heritage in the context of corporate marketing/corporate heritage marketing thought)
7. *Cross-Disciplinary* (cross-fertilisation and enrichment between subject areas and disciplines: marketing, communication, management, organisation studies; social sciences and humanities)

7 CONCLUSION

Our synopsis of the corporate heritage domain does, we hope, show the very real developments that have characterised the corporate heritage domain from 2006 onwards. This review has shown how meaningful conceptual, empirical and instrumental developments have characterised the domain and reveals how there has been an exponential growth in academic interest in the territory. Interest in the area is likely to grow. Clearly, corporate heritage represents not only a rich focus for academic research and scholarship but, significantly, represents an area that can have a real utility for organisations and who discover that they are invested with a corporate heritage and moreover with a corporate heritage brand.

† In the case of Shepherd Neame, recent archival research by John Owen shows that the temporal origin of the brewery goes further back than the official founding date of 1698 suggests; the foundation of the brewery can now be dated back to 1573 at least (see Owen, 2014).

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Editorial Box 1: The past as a constitutive element and as a contingency factor

Within corporate marketing (and related domains) two distinct perspectives on the past have so far characterised the field, namely:

1. the past treated as a contingency factor impacting on corporate-level phenomena/concepts;
2. the past treated as constitutive element of corporate-level phenomena/concepts.

Albeit both perspectives often overlap or are unwittingly conflated in the literature it is worth to differentiate them conceptually (at least in abstract terms).

The past as contingency factor

The first perspective, comprehending the past as a contingency factor, is broadly consistent with general management thought which recognises the past as an enabling or constraining dimension (resource or process) on the present and future of an organisation (Barney, 1991; Kimberly and Bouchikhi, 1995; Schreyögg et al., 2011).

With this perspective, the past is treated as a contingent factor (externality, environmental condition) that impinges positively (enabling) or negatively (constraining) on the development of an organisation in general or the corporate-level concepts under consideration in particular. This has implications for how corporate-level marketing phenomena are approached and understood. For instance, this is illustrated by the central role accorded to the historical trajectory of an organisation per se or to its founder(s) specifically regarding the development of:

- corporate identity (Moingeon and Ramanantsoa, 1997; Balmer, 2001; Melewar and Karaosmanoglu, 2006; Blombäck and Brunninge, 2009);
- corporate reputation (Fombrun and van Riel, 1997; Gray and Balmer 1998; Gotsi and Wilson, 2001);
- as a constraint vis-à-vis corporate-rebranding activities (Gotsi and Andriopoulos, 2007; Blombäck and Brunninge, 2009).

The past as constitutive element

The second perspective largely conceptualises the past as a constitutive element (internality, characteristic attribute) and an integral defining aspect of a corporate-level concepts/phenomenon instead of merely treating the past as an external variable.

Within this perspective, three distinctive conceptualisations of the past as a constitutive element can be delineated (again at an abstract level):

- (a) the past as historical manifestations;
- (b) the past as historical associations;
- (c) the past as historical references.

Historical manifestations refer to the past as an integral element of a particular corporate-level marketing phenomenon per se. These elements may manifest as substantive, symbolic, and communicative resources which constitute a corporate-level concept in a concrete identifiable form. For instance, definitions of corporate identity that include history are often predicated on such a conceptualisation (Balmer 2001) and implicitly comprehend manifestations of the past as a symbolic and cultural product of identity construction (Moingeon and Ramanantsoa, 1997).

Historical associations relate to cognitive and affective perceptions of the past in relation to an organisation or a corporate-level concept. For instance, this understanding of the past can be seen in the prevailing conceptualisations of corporate reputations (Gray and Balmer 1998) and corporate brands (Aaker 2004) as perceptual phenomena.

Historical references indicate the representative use of the past in textual, visual or oral form. For instance, the strategic utility of the past for corporate communication (Blombäck and Brunninge, 2009) or the constitutive relevance of historical narratives for corporate-level phenomena are a key concern of this conceptualisation.

Integrating both perspectives

A synthesis of both perspectives provides a general foundation for a more comprehensive treatment of the past within corporate marketing. As such, corporate-level concepts and issues can be better comprehended as temporal phenomena embedded in and constituted through historical processes.

Hence, organisations and associated corporate-level constructs such as corporate identity, corporate culture, and corporate brands are understood as 'being in history' as much as 'having a history.' Thus, they are being shaped by the past as much as shaping it (Moingeon and Ramanantsoa, 1997); as well 'making a history' so to speak (Urde et al., 2007).

Consequently, historical references, associations and manifestations may sometimes constitute an identifiable attribute inherent to a particular concept/entity and at other times might represent a strategic resource/constraint (or both, as an attribute can also become a resource as much as it may be a constraint on future strategic opportunities). At the same time, resources and constraints, whether external or inherent to the organisation or corporate brand, are not only material but may also be symbolic and discursive in nature.

Figure 2 schematically synthesises these principle understandings of the past that can be deduced from the extant corporate marketing literature.

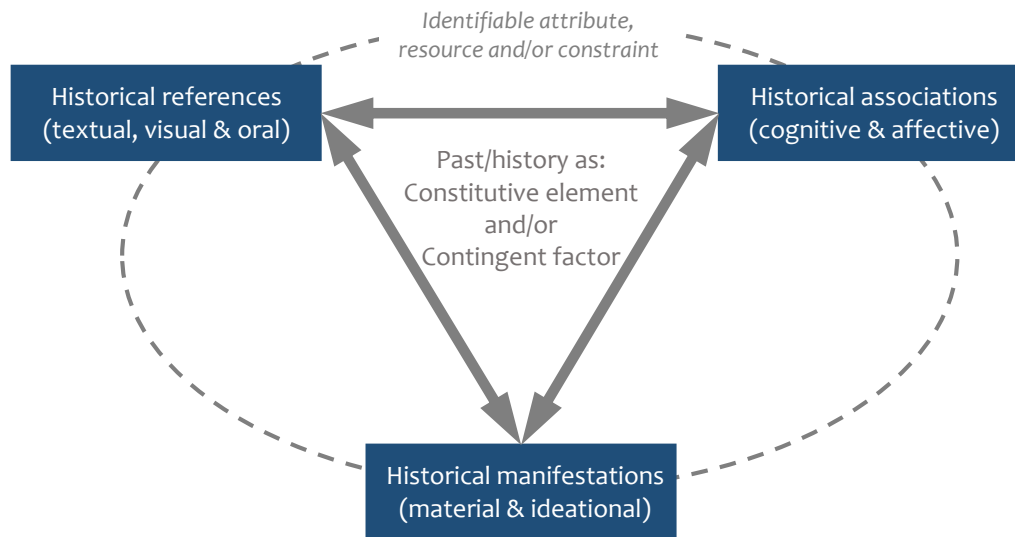


Figure 2: *The past in corporate marketing and related fields, schematic overview*

Editorial Box 2: Conceptualisations of heritage in marketing

A review of the marketing literature has uncovered seven ways in which heritage is used and/or understood:

1. Heritage as denotation of the temporality of a marketing construct
2. Heritage as mental associations based on historical references
3. Heritage as cultural/institutional legacy
4. Heritage as collective memory
5. Heritage as provenance, roots and origin
6. Heritage as denotation of longevity
7. Heritage as synonym for the past/different modes of referencing the past

First, heritage is sometimes used to denote the temporality of a construct.

For instance, Berthon, Holbrook and Hulbert (2003) refer to brand heritage as the accrued patterns of established brand associations in a customer's mind *over time*. Rindell (2007), making reference to *image heritage* as "the consumer's earlier company-related experiences from multiple sources *over time* activated for interpreting company-related experiences today" (Rindell, 2007, p. 165).

Second: Heritage as mental associations based on historical references

Here, brand heritage and corporate brand heritage are understood as a *customer's mental associations based on historical references* (e.g. Aaker, 1996, 2004; Keller, 2001, Keller and Lehmann, 2006). Also see Editorial Box 1.

Third: Heritage as cultural/institutional legacy

For some, heritage denotes a mode of *cultural legacy*. As such, it relates to the residue of a brand's or organisation's past actions accrued over time. This connotes the notion of a bequest of, for instance, accumulated values, principles, and achievements as well as cultural artifacts and practices – as such closely associated with the concept of corporate culture– that are venerated as an '*accretive past*' (Lowenthal, 1985, p. 61)

Fourth: Heritage as collective memory

The emphasis on heritage as intimating a legacy derived from the *collective memory* shared by consumers as members of a community associated with a brand is another perspective (Leigh, Peters and Shelton, 2006) or the shared collective identity of former members of a defunct organisation based on the question of '*who we were*' (Walsh and Glynn, 2008).

Fifth: Heritage as provenance, roots and origin

Heritage has been linked to an organisation's founding stages and the founder her- or himself (Kimberly and Bouchikhi, 1995; Kapferer, 1997; Ogbonna and Harris, 2001; Carson and Carson, 2003; Dall'Olmo Riley, Lomax and Blunden, 2004; Blombäck and Brunninge, 2009) as well as a company's or *brand's 'roots'* (Aaker, 2004), '*provenance*' (Wilson, 2005; Balmer, 2011a), or '*origin*' (Thakor and Kohli, 1996; Lim and O'Cass, 2001; Blinda, 2003; Simms and Trott, 2006).

Sixth: Heritage as denotation of longevity

Commonly, too, heritage is *used as a suffix* (e.g. heritage brand) in order to simply *denote a brand's maturity*, longevity, or its long-established position within a market or category (e.g. Blackston, 1992, 1995; Aaker, 1996; 2004; Liebrez-Himes et al., 2007).

Seven: Heritage as synonym for the past/different modes of referencing the past

A common predisposition is to use heritage as a broad *synonym for the past* of a brand or company. As such it can also be seen as *generic label* for various modes of linking past and present predicated on historical references (Blombäck and Brunninge, 2009) such as history or traditions (often conflating them or using heritage interchangeably) without much further appreciation of the differences between the underlying temporal concepts implicitly used.

Editorial Box 3: Recent empirical insights

Tiffany's and Burberry and Corporate Brand Heritage Crises

A longitudinal, retrospective case study by Cooper, Miller and Merrilees (2015b) contributes to the stream of corporate heritage scholarship which focuses on the instrumental efficacy of corporate heritage. In particular, the article demonstrates how two corporate heritage brands – Tiffany's and Burberry – were recovered from a brand crisis by utilising corporate heritage as a strategic resource. As such, the study broadly supports earlier work on this important brand management issue within the field of corporate heritage scholarship (Hudson 2011). However, the article by these three authors expands on this general theme and introduces a three-stage framework. This framework details generic brand management competencies that are required for the successful recovery of corporate heritage brands. In theoretical terms, the study further highlights the importance of continued heritage brand custodianship (Urde et al 2007) and an unremitting management tenacity vis-à-vis corporate heritage (Balmer 2013). Both cases provide key lessons for practicing managers facing a brand crisis but also how those currently responsible for corporate heritage brands can avoid brand decline.

The case of the Vespa Corporate Heritage (Motorbike) Brand and corporate image heritage

The study of Rindell, Santos and de Lima (2015) contributes to the stream of empirical inquiry that has focused on consumer image formation (Wiedmann et al 2011a, 2011b) and the emerging theme of the consumer (and stakeholder) relevance of corporate heritage brands per se (Balmer and Chen 2015). Their study of the Vespa brand reveals a disconnect between what consumers as members of a brand community jointly perceive as relevant corporate heritage attributes and what the company's brand communication accentuates as core corporate heritage elements of the brand. Based on these findings, the authors conceptually integrate the temporal concept of *consumer-based corporate image heritage* (Rindell 2013) into the heritage quotient framework (Urde et al 2007). The article also introduces a simple to use framework based on the relative relevance of heritage elements for consumers and the company, which could be particularly interesting for practitioners.

Corporate Heritage Architecture of French Financial Institutions and the notion of the architectural corporate heritage conduit

Building on the heritage quotient framework (Urde et al 2007), Bargenda's (2015) article shifts the attention from cognitive and perceptual aspects to the material and spatial manifestations of corporate heritage in and through corporate architecture. As such, this interesting study of the architecture of French financial institutions contributes to the emerging theme within corporate marketing scholarship that is exploring the multi-modal nature of corporate heritage implementation and the symbolic relevance of corporate heritage manifestations per se (Burghausen and Balmer 2014a; also see Hudson 2011). In particular, the article introduces the notion of the *architectural corporate heritage conduit* as the material-aesthetic manifestation of corporate heritage and this dimension is added to the generic corporate heritage marketing mix suggested by Balmer (2013).

Established corporate heritage brand vs contemporary corporate brands

In this study by Cooper, Merrilees and Miller (2015a) the instrumental management of established corporate heritage brands is compared with the management approach of contemporary corporate brands that do not focus on their corporate heritage. As such, this study empirically expands this conceptual differentiation first articulated by Urde et al (2007). Based on their comparative case study the authors introduce a four-dimensional framework that specifies the different instrumental requirements for these two categories of corporate brands. Conceptually, this study supports the notion of corporate heritage brands constituting a particular category of corporate brand that needs to be managed in a specific way (Urde et al 2007; Balmer 2011b) while providing an instrumental framework for managers that is clarifying these differences.
