

How can Corporate Heritage Brand Management Protect and Renew Brand Heritage?

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HOW CAN CORPORATE HERITAGE BRAND MANAGEMENT PROTECT AND RENEW BRAND HERITAGE?

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ABSTRACT

Corporate heritage brands represent a valuable source of insight into brand longevity. The complexity and omnitemporality of these entities present a unique set of managerial challenges. Therefore corporate heritage brands require a specific brand management approach. However, corporate heritage brands and their management are surprisingly under-researched. Moreover, in a corporate branding context the practices that protect and renew corporate brand heritage are unclear. However, the work of a few pioneering academics has been a source of inspiration and a theoretical foundation for this research. These studies include but are not limited to Urde *et al* (2007), Balmer (2011a, 2011b, 2013), Hakala *et al* (2011) and Hudson (2011).

The context of this research is corporate heritage brands and its positioning is corporate heritage brand management. The research was comprised of two discrete studies. The aim of Study 1 was to examine how luxury organisations manage corporate heritage to recover and enhance the corporate heritage brand. Study 1 presents a longitudinal, retrospective study of two corporate heritage brands, Tiffany & Co. and Burberry that experience structural corporate heritage brand decline followed by recovery. The analyses of the cases identified turning points that delineated three periods, specifically the foundational years; an interval of crisis; and subsequent ascendance. Three brand constructs are significant, they underpin the rise, fall and rise of Tiffany and Burberry; *brand vision*, *brand values* and *core competencies*. The study demonstrates how long-established corporate heritage brands can overcome structural brand crisis, by restoring corporate heritage.

The aim of Study 2 was to examine how corporate heritage organisations protect and renew brand heritage. Study 2 juxtaposed the corporate heritage brand management practices across two corporate brand types, corporate heritage brands and contemporary corporate brands. The research design was inherently comparative, contrasting the two corporate brand types in a comparable industry, across a total of five industries. The case study approach compared the two corporate brand types to isolate the managerial practices unique to corporate heritage brands. Study 2 comprised of two distinct but relevant approaches (i) semi-structured interviews with senior brand management and (ii) historical research. Each method was applied to the study of ten cases. Established

practices for ensuring validity and reliability (Miller, 2006, 2011; Patton, 2002) guided data collection and analysis in Study 1 and Study 2.

The research findings are considerable. An important first contribution of the research is the identification of several core differences in how corporate heritage brands and contemporary corporate brands manage heritage. A four proposition framework of brand heritage management embodies these differences addressing brand essence creation, brand continuity, brand protection and brand renewal to guide corporate heritage brand management. Second the research presents a three-part approach to change that explains how corporate heritage brands manage continuity and change, to enhance the corporate brand and its heritage. Third the research presents a framework for recovery brands. An important final contribution the research presents an integrated corporate heritage brand management approach. The integrated approach addresses how corporate heritage brand management protect and renew brand heritage.

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I was particularly grateful to receive the Megan Cleaver Sellick Bursary to support the completion of my thesis.

CERTIFICATION

This work has not previously been submitted for a degree or diploma in any university. To the best of my knowledge and belief, the thesis contains no material previously published or written by another person except where due reference is made in the thesis itself.

Holly Cooper
September 2015

PUBLICATIONS ARISING FROM THESIS

Cooper, H., Miller, D. and Merrilees, B. (2015a) Restoring luxury corporate heritage brands: From crisis to ascendancy. *Journal of Brand Management* 22(5): 448-460.

Cooper, H., Merrilees, B. and Miller, D. (2015b) Corporate heritage brand management: Corporate heritage brands versus contemporary corporate brands. *Journal of Brand Management* 22(5): 412-430.

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CHAPTER 1
CORPORATE HERITAGE BRAND
MANAGEMENT: AN INTRODUCTION

CHAPTER 1

CORPORATE HERITAGE BRAND MANAGEMENT: AN INTRODUCTION

1.1 INTRODUCTION

Brand heritage is an area of research endeavour, attracting significant academic attention (e.g. Balmer *et al* 2006; Hakala *et al* 2011; Urde *et al* 2007). Corporate heritage brands represent a distinct conceptual category and ‘require specific approaches to brand management’ (Burghausen and Balmer, 2015; Hudson, 2011, p. 1538). Foundational corporate heritage brand studies have suggested that a stewardship mindset, which embraces the responsibility of relevance, is of special significance. However, relevance is a ‘problematic issue for stewardship’ because of its complex relationship with continuity (Hudson, 2011, p. 1549). Notwithstanding, the corporate heritage brand domain is surprisingly under-researched (Balmer, 2013; Burghausen and Balmer, 2014b, 2015).

The positioning of the current study is to investigate how corporate heritage brand management protect and renew brand heritage. Corporate heritage brand management face the challenge of embracing continuity and change concurrently to maintain relevance. Those who have contributed to a foundational understanding of brand heritage emphasise the importance of a brand stewardship mindset (Greysier, 2009; Miller, 2014; Urde *et al* 2007). However, the particular practices that protect brand heritage and corporate heritage brands are unclear, calling for an integrated approach to corporate heritage brand management.

The design of the research is to contribute to the literature with guiding principles for protecting, developing and recovering corporate heritage brands. The research provides a set of principles for (1) protecting heritage through ongoing brand heritage management (2) a three-part approach to change that resolves the brand heritage paradox and (3) a framework for brand heritage recovery. The principal contribution is identifying how corporate heritage brand management protect and renew brand heritage.

First Chapter 1 provides a background and introduces the key literature domains that inform the research. Then the chapter outlines the central research questions and rationale for the study. After a brief outline of the research methodology, the chapter

details the scope of the research as determined by the research aims and objectives. Finally the chapter outlines the structure of the thesis and its content before presenting a glossary of central terms.

Background to the Research

With sufficient time, corporate brands develop illustrious strengths and enduring legacies that enviably distinguish them from other brands. La Università di Bologna originated in 1088 is the first University of the Western World; it has been a destination for many illustrious guests and produced leading thinkers, acting as a central point of reference in the ‘panorama of European culture’ (Università di Bologna, 2013). Creed originated in 1760, producing prestigious scents for royal houses and discerning patrons including King George II, Empress Eugenie and Sir Winston Churchill (Creed, 2015).

Rather than isolated exemplars, these corporate brands represent a greater company of corporate brands that have overcome the oppositions of time. Remarkably, conquering political cataclysms, social capriciousness and cultural dissensions to form formidable reputations and an immutable heritage. The longevity of this collective group is juxtaposed by the transient nature of other corporate brands. This polarity is indicative of the divergent corporate branding practices that underpin the respective strength of enduring corporate brands. Identifying the practices and greater principles that contribute to the longstanding quality of corporate heritage would empower leaders to manage corporate brands for longevity.

A clear strength of these long lasting corporate brands is heritage. Brand heritage is an invaluable branding tool (Blombäck and Brunninge, 2009; Hudson, 2011; Urde *et al* 2007). Tiffany & Co.’s design director, Van Day Treux for instance, in 1956 modernised the brand’s history when he reintroduced the French *vermeil* porcelain. The porcelain originally a ‘great favourite with the French Nobility’ when Tiffany’s first introduced it in 1845, attracted ‘endless news stories’ that re-authenticated the corporate brand’s royal past (Purtell, 1971, p. 212). Carl Lagerfeld’s bold interpretations of couturier Chanel’s pioneering designs that enlivened the timeless appeal of the brand, offer a more recent example (Davies, 2001). His modern approach, imbued with the core ideology he shares with German writer Goethe ‘make a better future by developing elements from the past’ (Menkes, 2010a) evinces the significance of heritage to contemporary brand management.

Brand heritage is a treasury of knowledge concerning longstanding brand management. It encompasses the physical artefacts and intangible attributes that connect the corporate brand to its past, often forming a vibrant blueprint of a brand's development (Menkes, 2010a). For instance, Dior's heritage is defined as 'the very essence of the brand' (Young, 2010a). It is not uncommon for corporate brands, especially iconic design houses, to endeavour to protect and leverage specific elements of the brand's heritage. The iconic corporate brand of Ferragamo, for example, appointed archivist Stefania Ricci to preserve and perpetuate the brand's design legacy (Young, 2010b).

These various examples illustrate the strategic significance of brand heritage for corporate brand management; heritage may also be of great significance to the endurance of corporate brands. However, few researchers empirically examine brand heritage or brand heritage management in a corporate branding context. The primary body of work is normative (Burghausen and Balmer, 2015). Notwithstanding, a number of scholars have made foundational contributions to the field of research (Balmer, 2011a, 2011b, 2013; Hakala *et al* 2011; Hudson, 2011; Urde *et al* 2007). They call for further empirical research that investigates corporate heritage brands and corporate heritage brand management.

Inherent to corporate heritage brands such as Tiffany & Co., Ferragamo or Lindt is the quality of longevity. Investigating the practices that contribute to the longevity of corporate heritage brands such as these can provide insight into how corporate heritage brand management can protect and renew brand heritage to strengthen the corporate heritage brands endurance capability. The purpose of this research is to identify the corporate brand management practices that renew and protect brand heritage. This core purpose is supported by the ancillary aim of identifying the role of brand heritage in developing corporate brand endurance.

The Rationale for the Study

Relatively few studies explore the management of corporate brand heritage. Moreover, scope for corporate heritage brand research in a luxury context is considerable. The current study addresses this issue. The research examines the brand management practices, which are unique to corporate heritage brands and which distinguish them from their contemporary counterparts.

1.2 BRIEF LITERATURE REVIEW

Corporate heritage brands abound in contemporary business and research. To illustrate, recent studies examine brands of this type including Moët et Chandon, Rolls Royce and Harrods (Balmer, 2011a; Hudson and Balmer, 2013). The strong reputation and longevity of such brands brings into question the potentially transient nature of other corporate brands. Identifying the brand management practices that contribute to the longstanding strength of corporate heritage brands can help leaders to adopt practices that support longevity.

An identifiable strength of many long lasting corporate brands is corporate brand heritage. The British Monarchy is arguably an exemplar in this area (Balmer, 2009; Balmer *et al* 2006; Greyser *et al* 2006). Similarly other organisations, such as Burberry (Moore and Birtwistle, 2004) and the Canadian Tim Horton's (Foster *et al* 2011) are arguably, 'endowed with a corporate heritage [and] have an ambient asset' (Balmer 2013, p. 291). While all brands have a history, only some have a corporate heritage (Urde *et al* 2007). What distinguishes a corporate heritage brand from an historical brand is the purposeful appropriation of history to contribute to its identity.

Various scholars allude to the centrality of heritage in developing a formidable brand (Aaker, 2004; Alexander, 2009; Balmer *et al* 2006; Leigh *et al* 2006). Marketers can leverage the socio-cultural associations, which develop around brands, to strengthen their cultural significance (Foster *et al* 2011). To illustrate, Tim Horton's developed a powerful corporate identity through its appropriation of National symbols and alignment with popular Canadian institutions that embody Canadian culture, including hockey (Foster *et al* 2011). Corporate brand heritage is a credible base for ritualising brand consumption and authenticating the cultural significance of a brand to a nation's identity, making it an invaluable measure in developing brand identity. Brand heritage is particularly central to the identity of luxury corporate brands.

Brand heritage may be a source of enduring value for corporate heritage brands (Greyser *et al* 2006), providing a foundation for strong and long lasting relationships with multiple stakeholder groups (Balmer, 2011b; Blombäck and Brunninge, 2013; Wiedmann *et al* 2011b). Further, brand heritage clarifies the past, reconstructing a narrative that is useful in a brand management context and relevant to contemporary stakeholders (Blombäck and Brunninge, 2009; Urde *et al* 2007). Additionally, brand

heritage is an important source of authenticity and legitimacy for organisations (Beverland, 2005b, 2006; Urde *et al* 2007). However, research that addresses the long-term management of corporate heritage brands is limited because the research field is emergent.

1.3 RESEARCH APPROACH

The question, which this study addresses, is:

How can corporate heritage brand management protect and renew brand heritage?

Following on from this central question are several sub questions.

How can corporate heritage brand management recover the corporate heritage brand after a crisis?

How can corporate heritage brand management protect the corporate heritage brand?

How can corporate heritage brand management renew the corporate heritage brand?

The sub questions will help to narrow the focus of the study while leaving the questioning open to future iterations (Creswell, 2003; Huberman and Miles, 2002).

The research strategy is a qualitative design and compares various brand management practices. A multiple case study approach is consistent with the research aims, enabling the examination of the phenomenon across different contexts. Thus, the research design is inherently and deliberately comparative (Eisenhardt, 1989, 1991), providing for the application of comparative logic and isolation of practices particular to corporate heritage brands. The methods the study used to elicit appropriate data are based primarily on face-to-face semi-structured interviews with two corporate brand types, corporate heritage brands and contemporary corporate brands.

Research Methodology

One way of developing an understanding of the unique brand management practices of corporate heritage brands is to contrast these with contemporary corporate brands. The

study juxtaposes five corporate heritage brands with five contemporary cases to identify critical differences between the two. Following a critical analysis of the relevant corporate branding literature and an explanation of the theoretical assumptions governing the study, the study details the research design. Such an understanding clarifies the corporate brand heritage construct. Further, this study provides insight into corporate heritage brands and corporate heritage brand management. The research identifies how brand heritage management protect and renew brand heritage.

Delimitations of Scope

This study addresses both brand heritage management and corporate heritage brands. Brand heritage management potentially applies to all organisations. The focus of this research is corporate heritage brands. However the study uses an innovative research approach that contrasts brand heritage management across corporate heritage brands and contemporary corporate brands. For the purposes of this research, corporate heritage brands are those that develop a distinct brand value proposition based on their brand heritage.

1.4 OUTLINE OF THE THESIS

This research has an eight-chapter structure. A brief outline of each chapter is as follows:

Chapter 1 Corporate Heritage Brand Management: An Introduction

This introductory chapter presents an overview of the thesis. The chapter gives a background to the research, provides an overview of the relevant literature and presents the central research question.

Chapter 2 Reviewing the Corporate Heritage Brand Management Literature

Chapter 2 presents a detailed review of the relevant corporate branding literature. Specifically the review focuses on corporate heritage brands, corporate heritage brand management and the special issue of brand heritage paradox. After synthesising the literature, the literature review outlines the fundamental gaps in the academic literature and positions the study.

Chapter 3 Research Design

Chapter 3 describes and justifies the research approach. Consistent with a pragmatist epistemology and ontology, the research was of a case study design. The research involved two studies. Study 1 applied historical research methods to two luxury corporate heritage brands. Study 2 involved the application of semi-structured interviews and historical research to the study of 10 cases.

Chapter 4 Brand Heritage Recovery: A Study of Two Corporate Heritage Brands

Chapter 4 presents Study 1. Study 1 examines the histories of two luxury corporate heritage brands, Tiffany & Co. and Burberry that experience structural corporate brand decline, followed by recovery.

Chapter 5 Corporate Heritage Brands versus Contemporary Corporate Brands

Chapter 5 outlines the interview findings from Study 2. Study 2 applies the methods of interviews and observations to ten corporate brands; five corporate heritage brands and five contemporary corporate brands. Then it identifies four themes around which the approaches diverge. They are brand essence creation, brand continuity, brand protection and brand renewal.

Chapter 6 Corporate Heritage Brand Management: Managing the Tension Between Brand Heritage and Innovation

Chapter 6 presents the historical findings from Study 2. The analysis focuses on the data collected through historical research methods. It presents an outline for each case focusing on the core events that have shaped the historical trajectory and identity of the corporate heritage brand. Then, the analysis discusses the continuity and renewal of each of the five corporate heritage brands.

Chapter 7 Discussion

Chapter 7 interprets and synthesises the findings from Study 1 and Study 2. The key issues are presented in three parts (1) protecting the heritage through ongoing brand heritage management, (2) brand heritage renewal and innovation and (3) brand heritage recovery. The discussion examines each of these in context of the extant literature.

Chapter 8 Conclusion

Chapter 8 discusses the theoretical, methodological and practical significance of the research findings. Specifically that it presents an integrated corporate heritage brand management approach with principles for protecting, developing and recovering corporate heritage brands. After which, the chapter outlines the research limitations and a series of recommendations for future research. Finally, the chapter presents the overall conclusions of the thesis.

1.5 GLOSSARY OF KEY TERMS

For purposes of consistency, the chapter will now define the core concepts of this research. It is particularly important to make a distinction between history, heritage and brand heritage because even though they have commonalities they are different. Another important clarification concerns the two corporate brand types upon which the comparison hinges; corporate heritage brand and contemporary corporate brand. Other important concepts that the chapter outlines in the glossary include brand heritage management. Table 1.1 outlines these key terms.

TABLE 1.1 KEY TERMS

| Term | Definition | References |
|---|---|---|
| <i>Brand Authenticity</i> | The notion of ‘preserving the enduring identity traits of corporate heritage brands’. Authenticity is a reputational element that has an important role in building and defending corporate heritage brand reputation. Sources of authenticity include heritage, consistency, quality, provenance, and downplaying commercial motives. Considerations include myths, traditions and symbols. Authenticity in the context of this research focus on the brand, opposed to the consumer and how they perceive or construct an authentic experience. | Aaker, 2009; Alexander, 2009, p. 558; Balmer, 2009, 2011a, p. 517; Beverland, 2006, p. 257; Urde <i>et al</i> 2007. |
| <i>Brand Heritage Management</i> | A system of management that emphasises the strategic preservation, development and perpetuation of the brand heritage resource specific to a corporate brand. | Cooper <i>et al</i> 2015a, 2015b; Urde <i>et al</i> 2007. |
| <i>Brand Paradox</i> | Corporate heritage brands embrace the seemingly contradictory concepts of continuity and change. This tension between constancy and change represents a core paradox. Brand management must maintain the ‘allure and magic’ of a corporate brand while concurrently being relevant. Scholars/academic literature suggests that paradoxes ‘require resolution’ if a corporate brand is to be successful. | Balmer, 2011b; Balmer <i>et al</i> 2006; Gyrd-Jones <i>et al</i> 2013; Hatch and Schultz, 2003; Merrilees and Miller, 2008, p. 539. |

| Term | Definition | References |
|-------------------------------------|---|--|
| Brand Protection | Safeguarding core brand identity elements, especially brand heritage involves protecting the ‘equity of the symbols’, assets and the brand from the ‘exploitation via perceived inappropriate applications or negative associations’. Thus, it is ongoing encompassing short and long-term temporal dimensions. Related terms include governance, stewardship and custodianship. Brand protection is fundamental to a brand’s ‘continuing success’. | Balmer <i>et al</i> 2006, p. 156, 2009; Simms and Trott, 2006, p. 235. |
| Brand Renewal | Strategically changing the corporate brand to make it relevant or maintain relevance. Adjusting an aspect of the corporate brand so that the value it offers stakeholder is pertinent, applicable, appealing and meaningful. Related terms include brand revitalisation and corporate rebranding. | Cooper <i>et al</i> 2015a, 2015b. |
| Contemporary Corporate Brand | Contemporary corporate brands typically have a track record of fewer than twenty-five years and take a modern approach to brand management. | Cooper <i>et al</i> 2015a; 2015b. |
| Corporate Brand | Corporate brands are valuable, intangible resources, which can create enduring value for organisations and their stakeholders. They embody a higher order of values than product brands that over time develop a myriad of unique associations. | Aaker, 2004; Balmer and Gray, 2003; Blombäck and Brunninge, 2008; Gyrd-Jones <i>et al</i> 2013, Merrilees and Miller, 2008. |
| Corporate Brand Heritage | Brand heritage is a ‘dimension of a brand’s identity’ with three generally accepted components: tangible, intangible and metaphysical. Brand heritage is of greater significance than other temporal concepts, such as past or history because of its ability to derive legitimacy and value from the past, present and potentially the future. | Aaker, 2004; Balmer, 2013; Burghausen and Balmer, 2014a, 2014b 2015; Hakala <i>et al</i> 2011; Urde <i>et al</i> 2007, p. 4. |
| Corporate Heritage Brand | Long established companies with ‘enduring identity traits’ that are to ‘a lesser or greater degree seemingly immutable’ including the brand marque, logo and long held, articulated brand values. | Balmer, 2011a, 2011b, p. 1381; Blombäck and Brunninge, 2009; Urde <i>et al</i> 2007. |
| Heritage | Valued objects, characteristics and qualities such as historic buildings, photographs or cultural traditions, inherited from past generations. It implies history, yet is distinct from history because it is relevant in the present. | Stevenson and Waite, 2011. |
| History | A continuous, typically chronological record of events. For example, the whole series of past events connected with a particular brand. | Balmer <i>et al</i> 2006; Stevenson and Waite, 2011. |

1.6 CONCLUSION

For the realisation of these ambitions, identifying how corporate heritage brand management protect and renew brand heritage, the nature of the case study design was inherently comparative. Two separate studies that build on the pioneering brand heritage research address the prevailing need for understanding the management of corporate heritage brands. The innovative juxtaposition of contemporary corporate brands with the corporate heritage brands facilitates the identification of the strategic brand management practices that are specific to the corporate heritage brand type.

CHAPTER 2
REVIEWING THE CORPORATE HERITAGE
BRAND MANAGEMENT LITERATURE

CHAPTER 2

REVIEWING THE CORPORATE HERITAGE BRAND MANAGEMENT LITERATURE

2.1 INTRODUCTION

Management of corporate brand heritage has strategic significance. It is not uncommon for corporate brands to concurrently protect and leverage specific elements of their heritage. However, the domain is still emerging and empirical research is limited (Burghausen and Balmer, 2015). Following Burghausen and Balmer (2014a, 2014b, 2015) and Hakala *et al* (2011), the current study elevates heritage above other temporal concepts, such as past or history. The reason is that heritage has the unique ability to derive legitimacy and value from the past, present and potentially the future.

The positioning of the current study is to understand and explain how corporate heritage brand management protect and renew corporate heritage brands. Several scholars have brought attention to the complexities and challenges that confront corporate heritage brand management. Corporate heritage brands need to be relevant and concurrently authentic. Burghausen and Balmer (2014a, 2014b, 2015) emphasise the importance of protecting the asset of brand heritage. However the particular practices for protecting and renewing the brand remain elusive. The purpose of this study is to better understand and explain the process of protecting and renewing corporate brand heritage in the context of corporate heritage brands.

The study draws on the literature domains of corporate branding, corporate heritage brands and brand heritage management. First, the corporate branding literature establishes the parameters of the study. Next, the review clarifies the qualities unique to corporate heritage brands. Finally, as corporate heritage brands arguably necessitate a special approach, the study examines the corporate heritage brand management literature to establish the pressing need for further research. A summary of the literature is followed by the explicit identification of the gaps and the research questions the study addresses.

2.2 CORPORATE BRANDS

Corporate branding developed from the 1990s as a specialised stream of marketing interest. Now an impressive body of knowledge, the literature is characterised by

challenges and tensions. The discipline's complexity has 'emerged and is grounded in three factors: the field's multidisciplinary roots, its broad scope and its need to address diverse, multiple stakeholders' (Gyrd-Jones *et al* 2013, p. 572). The inconsistency of terms and plethora of corporate branding concepts contributes to this complexity. Leading Gyrd-Jones *et al* (2013) to address the confusion. They propose corporate brand image, corporate brand identity and corporate brand culture are the core dimensions of corporate brands, promoting clarity through the synthesis and consolidation of terms. Corporate brand image is the differential aspects of brand experience that contribute to the brand's reputation, especially in the context of competitors. Reputation management, brand protection and brand building are strategically significant, while consistency across brand engagement points is an important tactical consideration.

Corporate brand identity comprises the organisational characteristics and attributes that contribute to brand authenticity and credibility. Authenticity has been of special interest, its management and construction particularly challenging (Alexander, 2009; Beverland, 2005, 2006; Diamond *et al* 2009) especially as corporate brands often have multiple identities (Balmer and Greyser, 2002; Gyrd-Jones *et al* 2013; Leigh *et al* 2006; Urde *et al* 2013). As one dimension of authenticity is originality, some suggest that the brand's value is enhanced through the multiplicity of identity traits, especially in a postmodern consumer context (da Silveira *et al* 2013; Holt, 2002).

However, the resounding argument is that alignment of these identities through consistency and clarity of communication is critical (Balmer, 2010, 2012b; de Chernatony and Cottam, 2006; de Chernatony and Riley, 1998; Hatch and Schultz, 2003; Knox and Bickerton, 2003; Merrilees and Miller, 2008). The expression of corporate brand culture is through the brand's values and influenced by the brand's historical development and leadership (Gyrd-Jones *et al* 2013; Schroeder and Salzer-Mörling, 2006; Urde, 2009, Urde *et al* 2013). Brand heritage and brand orientation are core strategic foci, while tactical considerations include the articulation of brand personality.

Corporate branding research is vast, evidence of the disciplines strategic significance. Research topics include brand orientation, internal branding, corporate brand building and corporate rebranding (see Bergstrom *et al* 2002; Gyrd-Jones *et al* 2013; Merrilees

and Miller, 2008; Urde, 2003). These studies have established the significance of corporate brands and identified core strategic practices. The complexity of the literature mirrors the nature of corporate brands. Corporate brands are valuable, intangible resources (Aaker, 2004; Balmer and Gray, 2003), which can create enduring value for organisations and their stakeholders. Unlike product brands that have a finite lifespan (Ewing *et al* 2009), corporate brands embody a higher order of values (Gyrd-Jones *et al* 2013; Merrilees and Miller, 2008) that over time develop a myriad of unique associations. Limited research addresses specific categories of corporate brands or addresses long-term corporate brand management issues.

One of the aforementioned topics that could provide relevant insights is corporate rebranding. The purpose of corporate rebranding is to enhance, regain, transfer or recreate corporate brand equity (Muzellec and Lambkin, 2006, 2008). Corporate rebranding strategies aim to recapture the attention of and reconnect with stakeholders. They involve rearticulating the brand's vision, values and direction (Merrilees and Miller, 2008). Research including that of Merrilees and Miller (2008) and Miller *et al* (2014), provide significant insight into this fixed interval of managed change and the implementation of corporate rebranding strategy. Three insights from the corporate rebranding literature are of particular interest in the context of this research. Although not specific to corporate heritage brands they can provide directive insight into their management. These are; corporate brand change is purposeful and strategic, culture can enable or disable corporate brand change and that brand heritage is a central consideration.

A primary trigger for re-visioning is structural change within an organisation. However irrespective of the trigger, the decision to re-vision the brand and the successful implementation of a rebranding strategy requires purposeful direction, operationalised by strong brand leadership. Miller *et al* (2014) link strong rebranding leadership to strong rebranding outcomes. Leadership is a significant corporate rebranding enabler, especially when leadership embrace a high level of brand orientation through communication, training and internal marketing' (Merrilees and Miller, 2008, p. 546; Miller *et al* 2014). Strategic change that is underpinned by passionate leaders is key to successful corporate brand management.

An organisation's culture has an important role in corporate rebranding. Culture can facilitate or inhibit corporate brand change. Several rebranding case studies highlight the challenge of aligning an organisation's culture with the new corporate brand (Gotsi *et al* 2008). Stakeholder buy-in is foundational to the success of corporate rebranding strategy (Merrilees and Miller, 2008). Retaining an arc of continuity between a corporate brand's past and re-visioned identity provides stability for stakeholders, improving employee disposition to changes (Merrilees and Miller, 2008; Miller *et al* 2014). The strategic appropriation of history can convey continuity and can anchor organisational change.

For example in the rebranding of Saab, brand management maintained an element of continuity between the brand's heritage and the company's new direction (Bergstrom *et al* 2002). In retaining core values, they protected stakeholder perceptions of brand authenticity. The case of France Télécom offers [another](#) example. Internal support of the brand's vision was foundational to the success of Télécom's rebranding strategy (Gotsi *et al* 2008). Thus the design of a suitable vision for the corporate rebrand balances the need to 'continue to satisfy the core ideology of the corporate rebrand, yet progress the brand' (Merrilees and Miller, 2008, p. 540; Miller *et al* 2014). The corporate rebranding vision must capture the core ideology of the brand as expressed through the organisational culture to have continuity in corporate brand expression.

The corporate brand's heritage is a central consideration. For successful rebranding, heritage requires careful consideration in the decision to redefine the corporate brand's strategic direction. For example, France Télécom's rich heritage and strong socio-cultural significance, was reason to retain the brand name as part of the rebranding strategy (Melewar *et al* 2005). In like manner the 'sense of ownership Irish people developed over Guinness restrained the freedom of action of the corporation' and also 'triggered high expectations that a modern corporation was unwilling to assume' (Muzellec and Lambkin, 2008, p. 293). Therefore, the rebranding strategy necessitated that management reconfigure the brand's architecture. The Guinness brand was pushed to a product level to protect the brand's heritage and a new corporate brand was created to remove perceived limitations (Muzellec and Lambkin, 2008). As these examples demonstrate continuity is significant to successful corporate rebranding.

Core brand values represent a stabilising force within an organisation and can provide a sense of continuity across a brand's history. Scholars suggest a positive correlation between core value consistency and brand continuity, as they remain central and defining tenets of a corporate brand's identity. As Urde (2009, p. 620) eloquently explains 'without continuity it is hard to imagine long-term corporate brand building'. Core values, which encompass the essence of a brand's track record, become a representation of continuity and a solid foundation for managing corporate brands over time (Urde, 2009). Continuity of core brand values supports the continuity of the corporate brand.

de Chernatony *et al* (2004), however, make an important distinction between core and peripheral brand values. A brand's peripheral values can change to reflect society's evolving values, while its core values are enduring (Collins and Porras, 1996; de Chernatony *et al* 2004). These core values, de Chernatony *et al* (2004) argue, originate from the identity of an organisation and are often influenced by the founder and other key stakeholders. The constancy of these core values, when supported by practices, which facilitate congruent brand action, can create a powerful sense of authenticity (Brown *et al* 2003, p. 21), enhancing brand longevity.

Balmer and Gray (2003, p. 983) argue that strong corporate brands are sustainable over a long period of time because they meet the criteria of 'being rare, durable, inappropriable, imperfectly imitable, and imperfectly substitutable'. The criteria which are grounded in the resource-based theory of a sustainable competitive advantage (Bharadwaj *et al* 1993; Hoffman, 2000) posit that corporate brands can develop unique and durable skills and resources, which competitors are incapable of duplicating, to impart 'long-lasting value' (Balmer and Gray, 2003, p. 983). Many theories however take the temporal dimension of the organisation for granted (Ooi, 2002) and empirical papers that investigate the corporate heritage brand management longitudinally are limited.

2.3 CORPORATE HERITAGE BRANDS

Corporate brand heritage is a 'dimension of a brand's identity' with three generally accepted components: tangible, intangible and metaphysical (Balmer, 2013; Urde *et al* 2007, p. 4). Tangibles include the entity, physical assets and artefacts. Intangibles include the distinct expertise and competencies of the organisation. The metaphysical

pertains to cultural and experiential elements. Corporate brand heritage is especially found in the longevity, core values, track record and symbolism of a corporate brand (Urde *et al* 2007). Corporate heritage enhances corporate brand identity in a way that is meaningful to stakeholders (Hudson, 2011; Urde *et al* 2007). Brand heritage is central to the identity of corporate heritage brands.

Building on the Balmer *et al* (2006) foundation, corporate heritage brands have a ‘track record for delivering value to customers’, which is embodied in the brand’s promise and enabled by the continuity of core brand values (Hudson, 2011, p. 1538; Urde *et al* 2007, p. 9). Urde *et al* (2007) suggest that as well as these characteristics, corporate heritage brands use symbols as a strategic expression of the past. However, not all of these qualities are unique to corporate heritage brands as they can also apply to more recently established organisations.

Conceptualisations have relied on a narrow body of empirical research because, as Balmer (2013, p. 295) argues, the corporate brand heritage construct has been ‘studiously ignored’. He broadens the earlier, yet foundational, conceptualisations of corporate heritage brands in an endeavour to account for their nuanced nature. Balmer proposes four identity traits that are particular to corporate heritage brands. These are temporality, institutional trait constancy and the capacity to harness positive emotions.

Temporality refers to the capacity that corporate heritage brands have to ‘inhabit multiple temporal frames’ in that they are they are ‘meaningful to the past, present and prospective future’ (Balmer, 2013, p. 306; Burghausen and Balmer, 2015, p. 28). The issue of heritage constancy can also be examined in terms of Balmer’s (2011b) notion of relative constancy. The theoretical notion identifies the distinct capacity for corporate heritage identities to concurrently accommodate continuity and change.

They have a timeless quality that enables the transcendence of traditional temporal frames. Moreover, the notion also encompasses the adaptation and reinterpretation of the institution’s heritage for ‘present purposes and in light of expectations for the future’ (Burghausen and Balmer, 2015, p. 28). For instance, (Cooper *et al* 2015a) evidenced how Burberry unlocked the timeless essence of its heritage to construct a powerful contemporary identity.

Continuity relates to the importance of longitudinal coherence of core brand values, symbols and performance (Burghausen and Balmer, 2015). The constancy of these institutional traits is fundamental to organisational stability (Hakala *et al* 2011). The continuity of core brand values, even with changing market conditions imparts the qualities of timelessness and trustworthiness to the corporate brand. Hakala *et al* (2011, p. 452) explains that the chocolate company Fazer's core values have 'remained the same since its establishment' in 1891. The continuity has strengthened the brand's cultural significance and interwoven the brand's history with Finland.

The socio-cultural provenance (origin) of a corporate heritage brand is another significant inference of continuity. Corporate heritage brands risk angering stakeholders when decisions compromise the brand's socio-cultural provenance. For example, Wedgwood's decision to shift production from its historical origins in England to China, compromised the socio-cultural component of the brand's heritage (Milner and al Yafai, 2003; Morgan, 2009). The decision undermined the corporate heritage brand's legitimacy and led to deterioration in product quality, which was a core brand value.

Finally, over successive generations, corporate heritage brands can develop social memory assets, which are specific to the brand. Memories that are shared inter-generationally, especially within a family construct or social group, strengthen emotional connections with the brand and enable the brand's story to retain its 'attractiveness over the years' (Hakala *et al* 2011, p. 449). As a 'new ethos of brand participation' emerges, consumers increasingly view 'brands as shared cultural property' (Cova and Pace, 2006 p. 1089; Holt, 2004). They take ownership over the brand, exercising rights of possession through the appropriation of power to influence and direct the brand's behaviour.

Brands and in particular corporate heritage brands because of their cultural dominance and distinctiveness become cultural property (Cova and Pace, 2006). Thus, a company's heritage status 'warrants an expanded notion of responsibility' that extends 'beyond the boundaries of the firm itself' (Burghausen and Balmer, 2015, p. 40). Because of their unique status, corporate heritage brands have a societal role with distinct obligations (Balmer, 2011b, 2013).

To claim authenticity, credibility and legitimacy corporate heritage brand management must consider the 'specific temporal, spatial and socio-cultural' status of the corporate heritage brand within its various contexts (Burghausen and Balmer, 2015, p. 40). Corporate heritage brands must be managed in a definite way that accounts for the complexity of the corporate heritage brand identity and its unique socio-cultural position (Balmer, 2011a, 2011b, 2013; Urde *et al* 2007). These qualities of temporality, institutional trait constancy and the capacity to harness positive emotions represent a stepping-stone in understanding corporate heritage brands and their management.

The identity traits of corporate brands are nuanced and complex. Consequently, corporate heritage brands require strong corporate heritage brand-management principles. Although foundational to an understanding of corporate heritage brands, conceptualisations have relied on a limited body of empirical research. Thus, pioneers including Burghausen and Balmer (2015), Hakala *et al* (2011) and Hudson (2011) warrant research that explicates the principles that underpin successful corporate brand management.

2.4 CORPORATE HERITAGE BRAND MANAGEMENT

As an emerging concept and distinct conceptual category, corporate heritage brands 'require specific approaches to management that differ from those required for younger brands' (Hudson, 2011, p. 1538). The literature overall does not feature many studies on corporate heritage brands or corporate heritage brand management. Scholars who have pioneered the concept's development and demarcation argue for further empirical research. Hudson and Balmer (2013) and Burghausen and Balmer (2014b), for example, contend that ongoing systematic studies which provide insight into the management of brand heritage and corporate heritage brands can make a significant contribution to the emerging literature.

Corporate heritage brands require ongoing strategic brand management to maintain saliency (Burghausen and Balmer 2015). However, corporate heritage brands have received little academic or empirical attention (see Burghausen and Balmer, 2015, Hakala *et al* 2011). The corporate heritage domain suggests that organisational leaders marry 'brand archaeology' with 'brand strategy' to maintain brand relevance (Balmer, 2011b, p. 1386). Brand archaeology assists with brand protection. It is not uncommon

for corporate brands, to endeavour to concurrently protect and leverage specific elements of corporate heritage.

Dior provides an example of the application of brand archaeology and brand strategy in an industry context. Dior appointed an archivist, who began the ‘Herculean task’ of organising the company’s archives for a 40th anniversary exhibit in 1985; more recently the archivist worked on a strategy to ‘keep the past in the present and help the past stand the test of time’ through archival digitisation (Young, 2010a). Dior’s archival department is called ‘Dior Heritage’ (Young, 2010a). The corporate heritage management literature places emphasis on leveraging corporate heritage as an organisational resource.

Balmer *et al* (2006) identify brand image, reputation, communications, brand promise, core values and brand stewardship as key dimensions of corporate heritage brand management. However, at the centre of these components is brand stewardship. The management mindset is ‘essential’ for ‘nurturing, maintaining and protecting brand heritage’ (Greyser, 2009; Miller, 2014; Urde *et al* 2007, p. 9). Miller situates the mindset of stewardship within the nexus of corporate brand management practices, explaining that brand heritage becomes a pillar of the firm’s orientation to promote internal brand alignment and total stakeholder buy in. Thus, elevating the strategic significance as part of the corporate brand management agenda.

Symbols are a means of expressing the core values of the brand. They have greater potential than words because of their ambiguous nature. Management can imbue symbols with meaning that emotionally engages consumers. Consistent appropriation of brand symbolism can ‘bring coherence and structure’ to the brand’s identity (Hakala *et al* 2011, p. 450). Historically grounded symbolism can ‘make it easy for consumers to recall and recognise’ a particular brand and to differentiate that brand from competing brands (Hakala *et al* 2011, p. 450). Historical symbolism that is overlaid with cultural meaning can strengthen the significance of a corporate brand’s identity.

Colours can also symbolically reference the historical continuity of a corporate brand. Colours can ‘become so consistently linked with a specific brand and its heritage that it acquires a second meaning’ (Hakala *et al* 2011, p. 450). For example Falu Rödfärg, a subsidiary of the world’s first limited liability company founded in 1288, has been

producing traditional red paint for more than 250 years (*Falu Rödfärg*, 2015). The authentic Falu Rödfärg red paint has adorned houses across Sweden for centuries, accommodating emotional and socio-cultural associations.

Examples of brand heritage being operationalised in contemporary branding practice are extensive. They include Longines 'Heritage Collection' (*Longines*, 2010), Bulgari's 125th anniversary celebrations (*Bulgari*, 2010), Haigh's Chocolates centenary exhibition (*Haigh's Chocolates*, 2015), Iittala's community for lasting design (*Iittala*, 2011) and Lanvin's narration of its 125-year history using social media platforms (Rudenko, 2014). However, the potential inherent to the corporate heritage brand resource extends beyond such applications. Brand heritage can be a mandate for excellence and platform for corporate brand heritage advancement (Cooper *et al* 2015a, 2015b).

Cultural heritage is an important consideration in strategic decision making processes especially when operationalising brand heritage. According to Hakala *et al* (2011, p. 453) countries with a strong cultural heritage are 'more traditional and inflexible' whereas a country with a weak cultural heritage may be 'modern and dynamic'. Hakala *et al* (2011, p. 453) explain that the 'strength of the brand's own heritage and the strength of the cultural heritage of the target country' are important considerations in the strategic operationalisation of brand heritage in international markets. The strength of heritage and cultural heritage in the brand's country of origin is also an important consideration.

Brand management can strengthen emotional bonds, socio-cultural credibility and brand legitimacy. For example, the 'Fazer blue' was 'launched just a few years after Finland become independent and 'besides of nature' is 'also a symbol of patriotism' a symbol imbued with cultural significance (Hakala *et al* 2011, p. 452). The Finnish oatmeal brand Elovena has also strengthened its cultural significance. Elovena's depiction of a 'blonde girl in national dress' is an icon that has interwoven the brand's heritage with the nation's heritage and collective memories (Hakala *et al* 2011, p. 452). Burberry provides another example of a brand story embedded with socio-historical associations. Burberry's Great War trench coat is a 'profound example of the cultural and social place in which brand legitimacy and provenance is given expression' (Alexander, 2009, p. 551).

Burghausen and Balmer (2015) propose the stewardship mindset as means for senior management to comprehend their governance responsibilities in respect to the omni-temporal nature of corporate heritage identity. Corporate heritage entities require a markedly different approach from the customary 'management function' that focuses on the short term (Burghausen and Balmer, 2015, p. 23). A strategic focus on longevity is an important support for the continuity dimension of the heritage institutional identity traits (Balmer, 2011b; Burghausen and Balmer, 2015). Burghausen and Balmer (2015, p. 23) argue that a 'key requisite for the successful stewardship of corporate heritage identity requires managers to think, feel and act as custodians'.

Burghausen and Balmer (2015) use three dimensions to characterise the stewardship mindset; positionality, heritage and custodianship. Positionality refers to managerial awareness of the company's 'particular socio-historical position' across its temporal, spatial and socio-cultural contexts (Burghausen and Balmer, 2015, p. 37). The concept encompasses managements' concern for the brand's continuance, regard for the brand's provenance and sense of self.

Heritage relates to managerial understanding, validation, appreciation and protection of the brand's heritage. The dimension of custodial awareness refers to the understanding management have of the responsibility and obligation to protect the brand's heritage quotient in preparation for its transference to the next generation. The dimensions represent a starting point for understanding the particular approach required in the management of corporate heritage brands.

In turn, the mindset is underpinned by six managerial dispositions. These include a sense of continuance, heritage and responsibility (Burghausen and Balmer, 2015). The stewardship mindset has three foci; brand protection, brand continuity and brand relevance. The first concern of brand protection refers to the ability to protect heritage over time (Balmer, 2011a; Urde *et al* 2007). The management of corporate heritage brands requires diligent protection of corporate heritage through ongoing brand stewardship (Balmer, 2011a, 2011b; Urde *et al* 2007; Wiedmann *et al* 2011a, 2011b). Developing a sense of responsibility inter-generationally can safeguard brand heritage over time.

However, in reality developing responsibility across generations is challenging, especially in the context of family enterprises (Handler and Kram, 2004; Miller *et al* 2003; *The Economist*, 2004). The role of brand stewardship is to divert the company from behaviour that will be detrimental to brand reputation, acting as a ‘countervailing force’ (Urde *et al* 2007, p. 14). Thus, brand protection involves implementing measures to protect the corporate brand’s equity.

The second concern is continuity. Preserving the ‘continuity of intangible “essential” brand factors’ especially heritage, underpins the relative authenticity and strength of corporate heritage brand identity (Newman and Dhar, 2014, p. 384). The continuity of a corporate brand’s values is repeatedly and directly linked to the preservation of brand authenticity (Balmer, 2011a; Greyser, 2009; Miller, 2014). Thus, operational practices that build internal commitment and dedication to the brand’s values among stakeholders (Balmer *et al* 2006; Ewing *et al* 2013; Hakala *et al* 2011; Merrilees and Miller, 2008; Urde *et al* 2007) and the next generation of leadership (Blombäck and Brunninge, 2013; Blombäck and Ramírez-Pasillas, 2012; Golant, 2012) are important aspects of stewardship.

The third concern is relevance. The stewardship mindset embraces the responsibility of relevance. Stewardship ‘does not mean inaction or discouraging change. On the contrary, adaptability is a very important element of stewardship’ (Burghausen and Balmer 2015; Urde *et al* 2007, p. 16). However, relevance is a ‘problematic issue for stewardship’ because of its complex relationship with continuity (Hudson, 2011, p. 1549). Corporate heritage brands need to accommodate ‘both continuity and change’ (Balmer 2011b, p. 1389). Several scholars have brought attention to the paradox of staying the same, but changing (Aaker, 2009; Balmer, 2011a; Merrilees and Miller, 2008; Urde, 2013). Maintaining past heritage and progressing brand identity are paradoxical (Merrilees and Miller, 2008). Yet, that paradox or tension is at the core of a corporate heritage brand’s identity and thus presents a significant challenge for brand management.

Managing brands for the long-term requires brand management to balance ‘brand constancy with activities that create relevance’ (Beverland and Luxton, 2005, p. 110). Keller (1993, 2009) recognises that energy, relevance and differentiation, can positively enhance brand strength. He argues that a brand needs to be strong in all three categories

to leverage heritage successfully. One way of creating a brand history, which may be particularly effective, is to link the brand's identity to broader social and cultural values (Foster *et al* 2011; Hakala *et al* 2011). Linking a brand to broader societal values can legitimise corporate heritage brands in a contemporary context

Organisations that connect brand heritage and cultural heritage through a sense of cultural continuity and meaningful communal traditions can strengthen the emotional and symbolic quality of consumer brand relationships (Hakala *et al* 2011). For example, Tim Hortons, the Canadian coffee chain, developed an iconic brand identity through the social construction of a brand heritage narrative that imparted long lasting strategic value to the brand (Foster *et al* 2011). Strengthening the cultural component of a brand's heritage may be an effective means of developing an iconic identity for that brand. The cultural strategy can be especially effective if management integrate archetypal myths and cultural legends into the brand story (Cooper *et al* 2010; Holt, 2003, 2004; Woodside, 2010).

Corporate heritage brands 'remain meaningful not only because of their provenance but because of their salience' as they 'not only have, but also give, identity' (Balmer 2011b, p. 1382). Burghausen and Balmer (2014a, 2014b, 2015) argue that the effectiveness of developing history and strengthening brand heritage is determined by managements' mindset. They argue that 'the strategic enactment of corporate heritage identity' requires a managerial approach that accounts for custodial responsibilities (Burghausen and Balmer, 2015, p. 23). These custodial responsibilities are to the brand's heritage and stakeholders.

The literature focuses on the nature, dimensions and pre-conditions of the concept of corporate heritage brands, but has been slower to articulate fully a framework for managing corporate heritage. Some papers have initiated an understanding of the managerial aspects of corporate heritage. Balmer (2009) is one of the more explicit papers dealing with the management of corporate heritage brands, including components such as continuity, visibility and strategy.

Urde *et al* (2007) also touches on several critical management aspects, built around brand stewardship, including a sense of responsibility, long-term continuity and safeguarding the heritage brand. The special role of custodianship/stewardship as a

management approach is also emphasised by Balmer (2011b). Finally, a fourth paper (Balmer, 2013) also emphasises the management aspect, especially his sixth corporate heritage criterion: unremitting management tenacity. It is in this spirit that the current study has been formulated and presented.

2.5 CORPORATE HERITAGE BRAND PARADOX

Branding scholars acknowledge the challenge of maintaining the ‘allure and magic’ of a corporate brand, and yet concurrently being relevant (Balmer *et al* 2006; Merrilees and Miller, 2008). The tension between constancy and change represents a core paradox in branding (Balmer, 2011b; Gyrd-Jones *et al* 2013). Corporate heritage brands, despite strong reputations, face the problem that comes with longevity, namely potentially being perceived as old rather than innovative (Wiedmann *et al* 2011a).

Corporate heritage brands are powerful because of their ability to develop new meanings over time while, in part, remaining unchanged. They encompass continuity and change. Balmer (2011b) terms their capacity to be variable and invariable simultaneously, as relative invariance. How brand management can strategically manage these conflicting brand elements remains convoluted because the brand heritage paradox has not been fully resolved.

Arguably, corporate heritage brands only remain relevant if they can manage change and continuity. The very notion of ‘heritage is of itself a paradox’ as a concern with ‘heritage is modernist’ (Balmer, 2013, p. 302). Corporate heritage brand management is fundamentally a contemporary concern. Although connected to the past, corporate brand heritage is ‘equally, and powerfully’ characterised as ‘decidedly’ modern (Balmer, 2013, p. 302). Managers today face the challenge of marketing a brand’s heritage in a way that is historically reliable yet does not make it appear out-dated. Being in tune with a brand’s community can support brand renewal practices and in turn, brand endurance (Balmer, 2011a). In turn, brand continuity is facilitated by a ‘long-term temporal orientation’ (Burghausen and Balmer, 2015, p. 41).

The importance of the core to corporate heritage brands is a central feature of the branding literature that provides insight into the paradoxical nature of corporate heritage brands (Beverland, 2005a; Urde and Koch, 2014). Brand essence has a strong connection to authenticity and brand heritage (Beverland, 2005a; Hudson and Balmer,

2013). To remain true to the authenticity of a brand, leaders must diligently govern the corporate brand's core values, a defining element of a corporate brand's essence (Hakala *et al* 2011; Iglesias *et al* 2013; Urde, 2009; Urde and Greyser, 2014, 2015). Iglesias *et al* (2013) suggest that peripheral values can change without affecting the continuity of a brand's core values. The core values can convey the constancy of the brand's promise, while adapting their interpretation and expression can make the brand relevant.

Designations for the core and defining elements of a corporate identity have included brand mantra (Keller, 1999, 2003) and more recently brand essence (Greyser, 2009; Merrilees and Miller, 2008; Urde, 2003; Urde and Koch, 2014). The variations in terminology reflect the scope of identity traits these terms can encompass. For the purposes of this study, the preference is to use the more inclusive term of core as it encompasses the notion of essence. Essence in turn incorporates the elements of brand vision, organisational values and brand promise or covenant, three elements which are consistent across the corporate branding literature (Balmer, 2001, 2009; Balmer *et al* 2006; de Chernatony, 1999; Harris and de Chernatony, 2001). Protecting and maintaining the authentic core of the corporate brand is a central concern in managing corporate heritage brand paradox.

Corporate heritage brand management must strategically address and resolve this paradox. Corporate heritage brands need to accommodate 'both continuity and change' (Balmer 2011b, p. 1389). Several scholars have brought attention to the paradox of staying the same, but changing (Aaker, 2009; Balmer, 2011a; Merrilees and Miller, 2008; Urde, 2013). Maintaining past heritage and progressing brand identity are paradoxical (Merrilees and Miller, 2008). Yet, that paradox or tension is at the core of a corporate heritage brand's identity and thus presents a significant challenge for brand management.

2.6 SUMMARY OF RELEVANT LITERATURE

As an emerging concept and distinct conceptual category, corporate heritage brands 'require specific approaches to management' (Hudson, 2011, p. 1538). The literature overall does not feature many studies on corporate heritage brands or corporate heritage brand management. Scholars who have pioneered the concept's development and demarcation argue for further empirical research. Hudson and Balmer (2013) and Burghausen and Balmer (2014b, 2015), for example, contend that ongoing systematic

studies, which provide insight into the management of brand heritage and corporate heritage brands, can make a significant contribution to the emerging literature.

Corporate heritage brands are complex. The omni-temporal quality and socio-cultural significance of these brands necessitate management embrace a greater frame of responsibility that extends beyond the brand and its immediate community. Some (Burghausen and Balmer, 2014a, 2015, p. 23) suggest that senior management ‘comprehend their ongoing governance responsibilities with a stewardship mindset’ because the long-term temporal orientation can facilitate the successful operationalisation of brand heritage.

Central foci of the stewardship mindset are brand protection and relevance. Corporate heritage brand management involves negotiating the inherently challenging paradox of constancy and change. However, the specific practices that brand management take to protect and renew corporate heritage brands have as yet not been identified. Further the specific practices corporate brand management uses to operationalise change without compromising brand heritage are not clear.

2.7 GAP IN THE LITERATURE

Based on the foregoing information, this study aims to identify the principles that underpin corporate brand longevity. The central question that this study will seek to address is as follows:

How can corporate heritage brand management protect and renew brand heritage?

The study addresses three specific gaps through the three corresponding supporting research questions.

1. Recovering the Corporate Heritage Brand

The characteristics of enduring corporate heritage brands often include remarkable, but fluctuating histories. However, scope for corporate heritage brand research in a luxury context is considerable. Moreover few empirical studies address questions of brand

heritage management in the context of long-term change in brand health and performance. The final supporting research question this study addresses is:

How can corporate heritage brand management recover the corporate heritage brand after a crisis?

2. Protecting the Corporate Heritage Brand

Corporate heritage brands as a symbol of the past, present and future, represent an interesting and valuable organisational asset. Corporate heritage brands require a specific brand management approach. The literature overall does not feature many studies on corporate heritage brands or corporate heritage brand management. A few emphasise the importance of brand stewardship to the protection of brand heritage, however few explicitly examine how corporate heritage brand management protect brand heritage. The second supporting question, which this study addresses, is:

How can corporate heritage brand management protect the corporate heritage brand?

3. Renewing the Corporate Heritage Brand

For long-term success, organisational leaders need to strongly govern brand essence while embracing change. Leading scholars contend that managing corporate heritage brand paradox is necessary for long-term corporate heritage brand success (Aaker, 2009; Keller, 2003). Although the paradox of changing but (apparently) staying the same is at the heart of branding, few studies investigate how to resolve the tension or best manage heritage brand paradox, particularly in the context of corporate heritage brand renewal. Therefore, the third supporting research question that this study addresses is:

How can corporate heritage brand management renew the corporate heritage brand?

Consistent with the assumptions of an emerging research design, these questions present a starting point that evolved during the study (Creswell, 2003). The central research question and three sub questions gave focus and direction to the study.

2.8 CONCLUSION

Brand heritage is an area of research endeavour that is attracting significant academic attention. Corporate heritage brands represent a distinct conceptual category. Consequently, corporate heritage brands require specific approaches to brand management that are different to those of contemporary corporate brands. Despite the prevalence corporate heritage brands and organisations leveraging their heritage in contemporary branding practice, the corporate heritage brand domain is surprisingly under-researched.

A few have pioneered the research of brand heritage, identifying the strategic significance and value of brand heritage in the context of corporate brands including Balmer (2011a, 2011b), Urde *et al* (2007), Hakala *et al* (2011). They necessitate further research to that addresses the management of corporate heritage brands. These pioneering studies inspired this research, providing the point of departure.

CHAPTER 3

RESEARCH DESIGN

CHAPTER 3

RESEARCH DESIGN

3.1 INTRODUCTION

The review of relevant literature in Chapter 2 outlines the foundational contributions scholars including Urde *et al* (2007), Balmer (2011a, 2011b, 2012a, 2013) and Hakala *et al* (2011) have made to the emergent field of corporate heritage brand research. They maintain that studies that provide insight into the management of corporate heritage brands would make a significant contribution to the field. It provides the impetus for this research.

The research is designed to gather theoretical and practical information serving as a basis for developing principles to guide the protection, renewal and recovery of corporate heritage brands. This chapter describes the two Studies that comprise this research and the methods respectively which have been designed to elicit appropriate data. Study 1 applied historical research to two case studies. Study 2 also was of a case study research design.

In short, they are based on two distinct but relevant approaches they are (i) qualitative semi-structured interviews and (ii) historical research. Each method has been applied to the study of a number of cases, which provide a means for analysing how corporate heritage brand management protect and renew brand heritage. Study 1 addressed the question *‘how corporate heritage brand management recover the corporate heritage brand after a crisis?’* Study 2 addressed the question *how can corporate heritage brand management protect and renew the corporate heritage brand?*

TABLE 3.1: TIMELINE OF RESEARCH PROCESS

| Study | Study 1 | Study 2 |
|---------------------------------|---|--|
| <i>Overview</i> | A study of two corporate heritage brands that experience structural corporate heritage brand decline followed by recovery | A study of the protection and renewal of corporate brand heritage in the context of corporate heritage brands. |
| <i>Cases</i> | Two iconic luxury brands Tiffany & Co. and Burberry. | Encompassed 10 cases representing five pairs of historical and contemporary cases. The last pair was conducted for reasons of theoretical saturation |
| <i>Research methods applied</i> | Historical longitudinal research | Historical research and semi-structured interviews |

3.2 QUALITATIVE RESEARCH STRATEGY

The limited previous empirical research on the topic of corporate heritage brand management and exploratory nature of the research objective made qualitative the most suitable research approach. Although clearly a number of studies have identified the significance of corporate heritage brands (Balmer *et al* 2006; Urde *et al* 2007), it would be premature to conduct quantitative research. Conducting quantitative research too early in a field's development can cause confusion. Balmer (2001, p. 248) argues that premature quantitative studies engulfed the emergent branding domain in a 'fog'. He explains that positivistic research methods are inappropriate in the initial stages of theory generation. He asks marketing scholars to 'give a greater emphasis to qualitative and case study research' as this is critical in building a strong foundation of theory (Balmer, 2001, p. 269). Thus, a qualitative research strategy was consonant with the aim of the research of building theory, enabling the development of an integrated theory of corporate heritage brand management.

Qualitative approaches include ethnography, phenomenology, grounded theory, hermeneutics and case study research. Ethnography involves extended periods of fieldwork to understand the world-view of an individual or group (Seale *et al* 2004). The ethnographic approach could not accommodate the longitudinal historical dimension of the research making it unsuitable for the current study. Phenomenology is well suited to consumer research focusing on understanding the consumers' lived experience (Goulding, 2005). Therefore, the approach is not suited to this research. Grounded theory entails systematically generating theory from the data and is suited to the study of behaviour with an interactional element (Glaser and Strauss, 1971; Goulding, 2005). Although limited, a number of studies provide a foundation for this study of corporate heritage brands, making a purely inductive approach unsuitable. Hermeneutics facilitates 'heightened cultural and linguistic sensitivities' (Burghausen Page 386; Cooper *et al* 2010; Gadamer, 1975; Hatch and Rubin, 2006) through the iterative analysis of a text to uncover the meaning it embodies as a part in context of a whole. Thus, it was not consonant with the research purpose or objectives.

Case study research enables depth of contextually grounded insight into complex organisational variables, making it particularly suitable to investigations where the object of inquiry is technically distinctive. Moreover, the strategy is valuable when the

research issues are obscure or not readily observable, making it well suited to investigating latent organisational practices concerning corporate heritage brand management. Cases, can be historical accounts, yet are more likely to be contemporary descriptions of recent events (Eisenhardt and Graebner, 2007). However, it is the strategy's scope to integrate both contemporary and historical foci that makes it suitable for this investigation into the long-term management of corporate heritage brands.

The need to bring out the unique qualities of corporate heritage brands required a novel case approach. Contemporary corporate brands were compared with corporate heritage brands. The juxtaposition illuminated the qualities unique to the object of interest, corporate heritage brands and the management practices that contribute to their unique longevity. As corporate heritage brands are an emerging research focus, scholars in addition to calling for further research, have recommended case study research to develop and strengthen the emergent theory. A case study research strategy was, in context of the research question, the strongest approach for (i) obtaining insight into complex phenomena and (ii) theory building.

3.3 STUDY 1 BRAND HERITAGE RECOVERY

Study 1 addressed the gap of long-term brand management in the context corporate brand decline in the luxury category. A qualitative research design was developed to investigate how luxury corporate heritage brands can recover after brand crises. The research strategy used a retrospective, longitudinal approach. Various scholars indicate the relevance of such studies and argued for further such endeavours (Alexander, 1997, 2010). Qualitative studies are prevalent in corporate branding research; however, less use has been made of historical analyses (Miller, 2014). Other branding scholars in the corporate heritage domain, such as Balmer (2009), have also used case studies and historical research. In other marketing contexts, historical research has been significant for contemporary theory generation, explaining processes of change that can add empirical depth to a research area (Hollander, 1986; Miller, 2011; Tadajewski and Jones, 2014; Thompson, 2010).

The scope of Study 1 is limited to corporate heritage brands in the luxury context. A further constraint with the approach is the inability to engage directly with the original actors, who are now deceased (Miller, 2006). Notwithstanding, actions and approaches to corporate heritage can be inferred from secondary materials (Miller, 2011, 2014).

Data collection was confined to publically available materials, as resources were not available to access onsite company archival collections, a problem that many researchers face in this domain (Miller, 2006).

3.3.1 SELECTION OF CASES

Four criteria guided the selection of suitable corporate heritage brands for the study. The first criterion was the luxury status of the corporate brand. The second criterion was firm longevity, a fundamental trait. Further, the circumstances had to change over time to include brand crises. Such circumstances had to be delineated by turning points (Hollander *et al* 2005), and identified by particular brand activity periods (Fullerton, 2011; Witkowski and Jones, 2006). This systematic approach is in contrast to studies, which focus on, say, arbitrary decades (decadism). The third criterion was a luxury company brand positioning and value proposition based on the brand's corporate heritage, which is a defining tenet of corporate heritage brands (Urde *et al* 2007). The fourth criterion, the availability of sufficient data for possible analysis, was a pivotal consideration (Miller, 2006, 2011, 2014). Two corporate heritage brands: Tiffany & Co. and Burberry met the criteria for selection.

3.3.2 STUDY 1: DATA COLLECTION

Data collection used publically available materials, consistent with Miller's (2006) guidance. Collecting historical data involves three distinct steps: (i) locating potentially relevant materials and then selecting the most appropriate for the research purpose; (ii) evaluating the authenticity and quality of the evidence; and (iii) organising the evidence to identify any apparent gaps, which might be filled by further data collection, or accepting that data collection has reached saturation (Miller, 2006; Patton, 2002). Major data sources included digital archives, digitised newspapers collections, published documents, works by specialist historians and annual reports. *The New York Times* in microform, for example, was an important source of primary evidence, providing a continuous stream of insight into New York City and its actors from 1857.

3.3.3 STUDY 1: DATA ANALYSIS

Qualitative historical data analysis 'involves interpretation and synthesis' (Witkowski and Jones, 2006, p. 76). For the study, thematic analysis guided the data collection and

analysis (Patton, 2002). From the outset, it was critical to analyse data in the context of their times, rather than through a contemporary lens, and relative to periodisation by turning points (Fullerton, 2011, p. 446; Hollander *et al* 2005; Witkowski and Jones, 2006). Consistent with the historical-comparative research method, the research process involved multiple iterations and multiple levels of analysis (Neuman, 2006). That constant state of enquiry facilitated the identification of key events for each corporate heritage brand, in turn illuminating consistent brand practices across the two cases. After critically evaluating suitability of evidence, the data were analysed and interpreted using four steps.

The first step was the chronological organisation of brand events and identification of turning points in the history of each case; this phase identified periods of brand neglect or mismanagement, and periods of brand recovery. The second step ‘deduced inferences from the data’ (Golder, 2000, p. 159). The third step was explanation building through iterative reconsideration of the inferences and the evidence. This step ensured that emergent themes were grounded in the evidence, and understood in the context of their times. The final step was the construction of an explanation of the brand journey and longevity of each corporate heritage brand.

Epistemologically, a longitudinal/retrospective research approach is necessary to remedy previous approaches in the brand demise literature that were unable to analyse long-term structural changes in the corporate brand character. Three temporal periods are the frame for the investigation. The periods are consistent with the turning points perspective of Hollander *et al* (2005). Within each time period, Study 1 adopts an ontological perspective of treating corporate heritage brands as an evolving phenomenon, with particular perspectives of a process orientation (see Miller *et al* 2014) and a resource-based orientation (see Urde *et al* 2013) to brand management.

Ensuring data integrity is fundamental to robust qualitative research. Established practices for ensuring validity and reliability guided data collection and analysis (Miller, 2006; Neuman, 2006; Patton, 2002). Analysing data from more than one evidence source was a means to recognise and overcome any biases and combat the weaknesses of single source evidence.

3.4 STUDY 2 CORPORATE HERITAGE BRANDS VERSUS CONTEMPORARY CORPORATE BRANDS

Study 2 addressed the gap of corporate heritage brand management, investigating how corporate heritage brands protect and renew their brand heritage. A qualitative research design juxtaposed two corporate brand types: corporate heritage brands and contemporary corporate brands. The unique case approach permitted the isolation of those practices of corporate heritage brands that were divergent.

A few have investigated corporate heritage brands and included a historical dimension (Hudson, 2011), however none as yet have juxtaposed the two. Moreover, the combination of semi-structured interviews and historical research was also a particularly innovative case approach. The strategic integration of multiple methods to achieve triangulation of the findings was a distinct strength of the case study research approach (Veal, 2005).

3.4.1 SELECTION OF CASES

Single Versus Multiple Cases

Depending on the aims of a study, investigations into organisational phenomena can use either single or multiple cases. Single case studies are suitable to the study of unique phenomena (Eisenhardt, 1989) such as a unique brand community (Cova and Pace, 2006) or the baseball spectators in Chicago's Wrigley Field Bleachers (Holt, 1995) and other isolated events. Multiple case studies when the phenomena are observable across a number rather than an isolated analytic unit. These were most applicable in this study, which as Eisenhardt (1989) suggested may be equated to a series of related laboratory experiments and used in the application of comparative logic. The multiple case study approach is consistent with the research objectives, enabling the examination of brand heritage management across different industry contexts.

Number of Cases

The case study literature emphasises the importance of using discernment in determining the number of cases that will constitute a study. Some advocate two to four cases as the minimum (Perry, 1998), while others investigate as many as 28 cases (Moll *et al* 2007). Instead of specifying a particular number of cases, consistent with Eisenhardt's (1989, 1991) theory building approach, cases were added until a point of theoretical saturation was reached.

A theoretical saturation test after six cases confirmed that the research had reached a point of theoretical saturation. The test essentially involved comparing the findings of each case pair with the previous pairs in respect to the core analytical concepts. A table facilitated this comparison between prior and emergent theoretical constructs.

An additional two case pairs were included to strengthen the research findings. The additional four cases confirmed the findings from the previous six cases. They also strengthened the foundational insights of the case research. After which, a further test for theoretical saturation confirmed that the incremental learning or insight would be insignificant. Ten cases permitted the recursive examination of emerging explanations using replication logic without compromising the context and detail of each individual unit of study.

Reasons for Case Pairing

Specific criteria directed the selection of cases. The governing criteria were as follows.

- (i) The period of fifty years was the benchmark for the inclusion of historic cases; companies qualified as historic if they had been established for at least fifty years. For the reason that most companies on average only ‘survive for a mere 40 years’ (Burghausen and Balmer, 2015, p. 27). Contemporary cases, had to be less than twenty-five years of age to qualify. The comparative dimension of the study amplified the nuances between historical and contemporary brand practice.
- (ii) Further criteria for selection of historic cases were the heritage identity traits: longevity; a degree of continuity in the brand’s core values and brand promise; responsiveness to change; and an organisational recognition that brand heritage was significant to the corporate brand’s identity (Balmer, 2011b, 2013; Urde *et al* 2007).
- (iii) A cross industry approach was particularly advantageous in identifying key principles underpinning the phenomenon of corporate brand longevity. It was also beneficial in explicating the concepts of endurance and heritage, calling attention to their interdependence within the corporate brand’s industry. The study examined corporate brands across five industries; wine production, jewellery, pearling, hospitality and fashion retailing.

- (iv) In selecting cases, the study considered the availability of public information including access to archives, the firm and its executives. These criteria were a platform for strategic case selection, enabling identification of the corporate brands most likely to afford the greatest insight.

Identification of Cases

To elucidate the research problems, contemporary and historic corporate brands were juxtaposed for comparison. This provided a means for identifying differences between the two insofar as their approach to achieving brand heritage and corporate brand renewal. Table 3.1 profiles the cases. A total of ten cases that span five industries comprise the analytic component of Study 2.

Wine production has a prominent cultural, religious and conspicuous positioning in society (Beverland, 2004). Heritage and traditions are defining characteristics that contribute to the enviable status of historical wineries. Luxury wineries deliberately create and manage authenticity, yet this ‘involves a number of paradoxes because brands must remain true to an authentic core while also remaining relevant’ (Beverland, 2005b, p. 105). Managing changing tastes, unpredictable weather, political uncertainty and heightened competition, whilst maintaining authenticity is an ongoing challenge for brand management. These pertinent challenges and the industry’s salient heritage were compelling reasons to include the wine industry in the study.

The historical case was Tyrrell’s winery and the contemporary case Sirromet. Tyrrell’s is one of Australia’s first families of wine, ‘rich in history and pioneering achievements since 1858’ (Tyrrell’s, 2013; *Tyrrell’s Archive*, 2011). Its contributions to Australia’s wine industry are meritorious and its heritage is central to the brand’s contemporary identity. Sirromet, a lifestyle wine brand established in 2000 by Peter Morris, has quickly developed a reputation through its modern techniques and focus on sustainability.

As an ancient form of adornment, jewellery is charged with symbolic meaning and features strongly throughout history with hedonistic significance (Evans, 1970). Jewellery has long symbolised status and is increasingly a tool for the expression and construction of an idealised self. The jewellery industry is of an enduring nature and is intrinsically tied to the hedonic, aspiration values of consumers and their quest for self-

expression (Kornitzer, 1955; Kunz, 1908/1993). The information age however has born a consumer that is savvy, demanding and unforgiving when it comes to their expectations of corporate brands. Stakeholders are requiring more of corporate brands, determining that they are transparent with their sourcing of raw materials such as diamonds and their method of craftsmanship. The luxury jewellery industry faces challenges to remain relevant and preserve brand authenticity within a highly competitive market as technology and stakeholder values evolve.

The historical case chosen for inclusion in the jewellery industry was Percy Marks and the contemporary case, LeGassick. Established in 1899, Percy Mark's was the first purveyor of Australian Black Opals and developed an international reputation for its craftsmanship and rare gemstones. LeGassick was founded in 1992, specialising in rare diamonds and delivering a quality contemporary experience to stakeholders. The time difference and polarising practices made the two jewellery retailers appropriate to include in the study.

Australia's pearling industry emerged following the demise of the Pearl Shell industry, which followed the invention of the plastic button. A handful of enterprising pearlery thus began experimenting with pearl culture. Their research that leveraged the early success of the Japanese with the Akoya Oyster became the foundation of Australia's lucrative pearling industry. This industry has a dark history; South Sea pearling industry remains shrouded in secrecy and dominated by a few high profile companies. Furthermore, high barriers to entry, controlled licences, intense competition and natural disasters that frequent tropical pearl beds challenge the viability of even the most successful companies. The challenges confronting seasoned pearlery and new market entrants are compelling reasons to investigate longevity in the context of Australia's pearling industry.

TABLE 3.2: STUDY 2 PREVIEW OF CASES

| Industry | Case Type (Year Founded) | Case Overview |
|--|---|--|
| <i>Case Set One</i> Wine industry | <i>Historical Case</i> Tyrrell's (1958) | Rich in history and pioneering achievements the brand's contributions to Australia's wine industry are extensive and include the development of the Semillon variety. The brand's heritage is central and a defining tenet of the brand's contemporary identity. |
| | <i>Contemporary Case</i> Sirromet (2000) | The lifestyle wine brand focuses on modern techniques and sustainable practices. The 5-star winery has collected over 700 prestigious national and international awards. |
| <i>Case Set Two</i> Retail jewellery and manufacturing | <i>Historical Case</i> Percy Marks (1899) | As the first purveyor of Australian Black Opals, Percy Mark's has developed a strong international reputation for mastery of rare gemstones, especially those unique to Australia. |
| | <i>Contemporary Case</i> LeGassick (1992) | LeGassick strives to deliver a contemporary and personal experience to consumers across each of its three retail stores that extend to their custom jewellery creations. The brand specialises in rare diamonds and emphasises digital communications. |
| <i>Case Set Three</i> Pearling | <i>Historical Case</i> Paspaley (1956) | Nicholas Paspaley began pearling shell in 1933 and established the Paspaley Pearling Company in 1956. Paspaley has been a pioneer in Australia's contemporary South Sea Pearling Industry and is the leading producer of South Sea Pearls. |
| | <i>Contemporary Case</i> Broken Bay Pearls (2002) | The only producer of Australian Akoya pearls that has established a reputation for their high quality. They emphasise sustainable practices and the authenticity of their product. |
| <i>Case Set Four</i> Hospitality | <i>Historical Case</i> Huka Lodge (1924) | An iconic New Zealand retreat situated on the famous Waikato river. The lodge's unrivalled riverside location, superb hospitality and attentive yet sensitive service make the lodge sought by the world's most discerning travellers including Queen Elizabeth. |
| | <i>Contemporary Case</i> The Henry Jones Art Hotel (2004) | The Henry Jones Art Hotel presents a luxurious and innovative way for consumers to experience the sites unique history and showcase contemporary Tasmanian works of art. The Henry Jones Art hotel is Australia's first dedicated Art Hotel. |
| <i>Case Set Five</i> Fashion | <i>Historical Case</i> Rodd & Gunn (1946) | An international menswear retailer that places emphasis on authenticity, specialising in clothing for the outdoor pursuits of men. The brand's heritage is central it's contemporary identity. |
| | <i>Contemporary Case</i> Ubermen (2010) | A lifestyle fashion and retail brand that emphasise fashion forward styles at reasonable prices. They provide a complimentary styling service and strive to develop an impressive heritage. |

The historical case was Paspaley and the contemporary case, Broken Bay Pearls. Nicholas Paspaley began pearling shell in 1933 and established the Paspaley Pearling Company in 1956. As the progenitor of Australia's contemporary South Sea Pearling Industry and the leading producer of South Sea Pearls, Paspaley was an integral case in the study. Broken Bay pearls was formed in 2002 and is one of the few contemporary entrants that have established a reputation for high quality pearls, making it an appropriate case for comparison.

The preceding three sets of cases traverse production, manufacturing and retail. To extend the findings and strengthen the applicability of the theory developed by the study, two polar cases in the service industry were chosen. Unlike the other industries that create something tangible that is in turn supported by a service dimension, industries falling within the service sector centre on the creation of an intangible service experience. The hospitality industry is of particular interest, as longstanding hotels through renowned traditions and popular culture have become prominent examples of longevity. A select few hotels have endured war, economic downturn, political uncertainty and social unrest to become institutions of art and culture that offer an authentic experience sought out by consumers.

The historical case was the Huka Lodge and the contemporary was the Henry Jones Art Hotel. The Huka Lodge situated on the iconic Waikato River in New Zealand was founded in 1924. The retreat has long been a favourite with royalty and continues to attract discerning travellers with its reputation for extraordinary hospitality and exclusive status. The Henry Jones Art Hotel was established in 2004 after extensive renovation transformed the heritage building, located on one of Tasmania's most significant industrial heritage sites, into a contemporary hotel that fused history and modernity through design. It is located in a historical precinct dating back to 1804.

The fashion industry demands constant change. The challenge of maintaining brand relevance is heightened especially over time, making this an appropriate fifth industry. Luxury diffusion lines, increasingly complex distribution frameworks and systems, proliferation of fast fashion brands and the central role of social media in managing consumer brand relationships necessitates a strong and dynamic brand management approach by fashion brands especially for corporate heritage brands.

Rodd & Gunn, a menswear brand that specialises in outerwear, was formed in New Zealand in 1946 and has since grown into an international menswear retailer specialising in men's outerwear. Thus, the corporate brand Rodd & Gunn was consistent with the selection criteria for inclusion as the historic case. Ubermen, a fashion forward menswear brand established in 2010, was a suitable contemporary counterpart. These two cases brought the total number of cases to 10, they added further depth and richness to the study, confirming and extending the previous findings. Chapter 6 examines each of these cases in greater detail.

3.4.2 STUDY 2A: DATA COLLECTION

Interviews with senior managers were the primary information source. The data collection tool (interview protocol) generated important insights into the management of corporate brands from a present-time perspective (Fontana and Frey, 1994). The style and scope of the interviews was governed by the specific nature of the research problem. The research objectives determined that the study adopt an exploratory approach. Harris and de Chernatony (2001) successfully used a topic guide in depth interviews to gain insight into successful financial service brand management. In a later study de Chernatony and Cottam (2006) also demonstrated how topic guides accomplish the aim of steering depth interviews. Their approach was the basis of this study.

Interviews were semi-structured, based on research questions and prior theory thus eliciting descriptions about the complexities of governing the corporate brands over time, and especially relating to brand continuity and renewal. I framed the interview questions 'in such a way as to encourage interviewees to use their own language to convey their branding stories, drawing from their own experiences in choosing a response' (de Chernatony and Riley, 1998, p. 430). The interview questions were consistent for the heritage and contemporary corporate brands.

At the core of the interview protocol are three key areas that, according to the seminal literature, are central to corporate heritage brand management. They are (1) that heritage is of importance to brand essence (Balmer, 2013, *et al* 2006; Hudson, 2011; Urde *et al* 2007); (2) issues of continuity and protection are essential to the day-to-day management of the brand (Balmer, 2011a; Urde *et al* 2007); and (3) achieving relevance

through brand renewal (Balmer, 2011b; Hudson, 2011). Indicative interview questions were:

How would you describe the essence of the corporate brand?

What are some of the special things you do to protect the essence of the corporate brand?

How do you maintain the corporate brand's long-term viability?

What is the role of innovation in strengthening the corporate brand?

How do you keep the brand up-to-date?

Semi-structured interviews were designed to capture the complexities of governing corporate brands over time, and they related to brand continuity and renewal. The interview protocol enhanced consistency across interviews while allowing for flexibility (Yin, 2009). The flexible framework served the purpose of steering the interviews and encouraging informants to 'develop their own arguments' (de Chernatony and Riley, 1998, p. 430).

Interviewees were encouraged to respond for as long as they desired and encouraged to clarify (Patton, 2002) or elaborate (Beverland and Farrelly, 2010; de Chernatony and Segal-Horn, 2003) on key points. Appendix 2 outlines the questions that guided the interviews. All interviewees were senior leaders with extensive corporate brand knowledge. Each interview lasted between 80 and 150 minutes. Table 3.3 provides a summary of the interviews and source materials.

As interviews are only verbal reports, they may be susceptible to the common problems of bias, poor recall or inaccurate articulation (Goulding, 2001). Certain precautions were taken to protect the quality of evidence. These included recording and then the verbatim transcription of each interview in its entirety by the company Pacific Transcriptions. Listening multiple times for accuracy also provided a 'more accurate rendition' of each conversation (Yin, 2009, p. 109). Furthermore, the interview data was compared with historical information confirming key facts and access to 'corroboratory' forms of evidence (Yin, 2009, p. 160). For example, following an in depth interview access to company archives was provided by its managing director.

3.4.3 STUDY 2A DATA ANALYSIS

Data analysis used thematic analysis, after Braun and Clarke (2006). The ‘structured and diverse lenses’, adopted through the layered analyses, improved the accuracy and reliability of the theory, which it generated (Eisenhardt, 1989, p. 541). A close fit ‘is important to building good theory because it takes advantage of the new insights possible from the data and yields an empirically valid theory’ (Eisenhardt, 1989, p. 541). The analytical process had five defined layers of analysis *viz.* coding generation, pattern matching, review, defining themes and reporting. Repeated reading, searching for meaning and analytic patterns, provided an important basis for data immersion and analysis (Braun and Clarke, 2006, p. 87).

After this analytical prelude interesting features of the text were coded in a ‘systematic fashion across the entire data set’ (Braun and Clarke, 2006, p. 87). Codes identify a semantic or latent feature of the data. Semantic codes identified attributes within the explicit or surface meanings of the text. Latent codes examined the ‘underlying ideas, assumptions, conceptualisations and ideologies’ (Braun and Clarke, 2006, p. 87). Key code words included renewal, heritage and review.

After exhaustive coding of the text, analysis entered the third level. This analytical stage of pattern matching involved re-focusing the analysis by moving away from key words toward greater themes that embodied the data. In this search for themes more broadly different codes were sorted into potential themes and relevant coded data extracts were collated within the identified themes.

Assurance of Quality of Analytical Results

To ensure the quality of analytical results, this study was guided by Creswell (2003) and Yin (2009), and applied three principles, namely: (1) multiple sources and forms of evidence; (2) an audit trail; and (3) an explicitly comparative approach. Multiple sources and forms of evidence represented an important form of triangulation. Multiple information sources included company archives, digitised newspapers, company documents and websites, and on-site observations. The strategic ‘combination of multiple methodological practices’ and empirical materials within the study added ‘rigor, breadth, complexity, richness, and depth’ to the research findings (Denzin and Lincoln, 2005, p. 8). A research journal logged impressions, reflections, initial data analysis and additional information.

TABLE 3.3: STUDY 2 SUMMARY OF INTERVIEWS

| Case | Interviews | Interview Details | | Location | Source Materials* |
|--|--|----------------------|-------------|---------------------------------------|---|
| | | Date | Length | | |
| Tyrrell's Wines [Wine industry] | Bruce Tyrrell <i>Managing Director</i> | 8 December 2011 | 156 minutes | Tyrrell's Winery Pokolbin | Observation, selected newspapers & firm correspondence |
| | Chris Tyrrell | 11 January 2012 | 106 minutes | Tyrrell's Winery Pokolbin | |
| Sirromet [Wine industry] | Rod Hill <i>Director of Sales and Marketing</i> | 16 August 2011 | 81 minutes | Sirromet Winery | Observation, selected newspapers |
| Paspaley [Pearling] | Richard Broug <i>General Manager</i> | 9 September 2011 | 94 minutes | Paspaley, Martin Place, Sydney | Observation, selected newspapers, company documents & firm correspondence |
| Broken Bay Pearls [Pearling] | Peter Clift <i>General Manager</i> | 9 March, 2013 | 156 minutes | Mr Clift's Tuncurry residence | Observation, selected newspapers, annual reports & firm correspondence |
| Percy Marks [Retail jewellery and manufacturing] | Cameron Marks <i>Managing Director</i> | 20 February 2012 | 116 minutes | Percy Marks, Elizabeth Street, Sydney | Observation, selected newspapers, company documents & firm correspondence |
| Le Gassick [Retail jewellery and manufacturing] | Darren LeGassick <i>Managing Director</i> | 11 July 2012 | 109 minutes | LeGassick Gold Coast | Observation, selected newspapers, company documents & firm correspondence |
| Huka Lodge [Hospitality] | Louise Smythe <i>Marketing Director</i> | Part 1: 16 July 2013 | 58 minutes | The Huka Retreats Auckland Office | Observation, selected newspapers, company documents & firm correspondence |
| | | Part 2: 17 July 2013 | 49 minutes | Huka Lodge, Taupo | |
| Henry Jones Art Hotel [Hospitality] | Rod Black <i>General Manager</i> | 15 May, 2013 | 143 minutes | Henry Jones Art Hotel, Hobart | Observation, selected newspapers, company documents & firm correspondence |
| Rodd & Gunn [Fashion] | Bob Rodgers <i>Brand Strategist</i> | 7 March, 2014 | 93 minutes | Café, Mount Tamborine | Observation, selected newspapers, company documents & firm correspondence |
| | Mike Beagley <i>Marketing Director</i> | 15 April, 2014 | 47 minutes | Rodd & Gunn Melbourne Head Office | |
| Ubermen [Fashion] | Bonnie Hung <i>Marketing Manager</i> | 8 August, 2014 | 95 minutes | Ubermen Brisbane Head Office | Observation, selected newspapers, company documents & firm correspondence |

* For details of source materials see page 207.

Data was analysed within and across cases, facilitated by the comparative approach. For each pair of cases, the corporate heritage brand was compared to the corresponding contemporary corporate brand. As each pair was added, the same process occurred, but additionally comparison was made to previous sets of pairs.

Theoretical Propositions

To develop or extend marketing theory, some authors develop propositions (Merrilees and Miller, 2008). The use of propositions has a long tradition in developing marketing theory (Bharadwaj *et al* 1993; Burt *et al* 2003). For example, Kohli and Jaworski (1990) draw on a critical analysis of the relevant literature, together with field research to develop a set of propositions. They used the propositions as a foundation for the construction of a comprehensive framework that would directly influence managerial practice and subsequent research studies. Following the tradition of Kohli and Jaworski (1990), the current study adopts propositions as a means of developing marketing theory and extends earlier approaches by also using archival materials and documents and contemporary fieldwork (interviews).

3.4.4 STUDY 2B DATA COLLECTION

For an understanding of how corporate heritage brand management protect and renew brand heritage longitudinally, a historical component was necessary. Key sources of historical information included state archives, company archives and digital archives, particularly the National Library of Australia's collection of digitised newspapers. Other historical information included the writings of historians, recollections, photographs, film, promotional material, company documents and newspaper articles. Collection of historical data entailed three distinct steps *viz.*

- (a) Selecting and locating appropriate evidence
- (b) Evaluating the quality of evidence
- (c) Organising the historical information.

Some archival records were located within the firms while others were available in University collections, State libraries, specialist institutions and national archives. The National Library of Australia's digital archive was a tool used to find evidence relevant to each case before 1982 and pointed to other archival repositories. Using an understanding of the chronological development of the brand as a research platform, critical time intervals were identified and further evidence collected. The examination

of the historical details of each corporate brands rather than ‘one time point’ distinguished aspects constant from those that were ephemeral (Neuman, 2006, p. 421).

Neuman (2006) outlined a series of steps for evaluating the quality of historical evidence. These steps were used as a guide to assess the credibility of information. The first two steps represent specific questions they are,

- (i) How relevant is the evidence to emerging research questions and evolving concepts?
- (ii) How accurate and strong is the evidence?

As a means of investigating these, three specific items were considered *viz.*

- (a) The implicit conceptual framework
- (b) Distinct details
- (c) Factual statements on which there is agreement between various pieces of evidence.

This was subsequently organised following the clear instructions of Neuman (2006) on managing historical evidence. Tables organised the data by case, date and form in preparation for analysis. The research software Nvivo was an additional tool used for the organisation and storage of case evidence.

3.4.5 STUDY 2B DATA ANALYSIS

Neuman (2006) described a method of analysing historical data, historical comparative analysis, which was used in this study. To support the analysis, detailed notes and emergent themes were recorded through each stage of the historical research process. These notes captured theoretical insights and also stimulated ‘new ways to organize the data’ and ‘new questions to ask of evidence’ (Neuman, 2006, p. 429).

After critically evaluating evidence (Golder, 2000) the data were analysed and interpreted using four steps. The first of these steps involved chronological organisation of brand events and this led to the identification of turning points in the history of each case. Periodising the history of each corporate brand by marking ‘important turning points in time’ had ‘several advantages over simple chronology’ which included summarising and structuring the research, facilitating comparative analysis and imposing parameters on ‘historical investigation’ (Hollander *et al* 2005, p. 35). These

parameters of the research questions focused the investigation, helping to sort through ‘masses of material and identify patterns’ that were significant to the study (Hollander *et al* 2005, p. 35). Emphasis during the organisation of the data was on identifying key events, and interactions between core characters and these events (Savitt, 1980). The short history of the contemporary cases made the interviews and observations more central to the case findings.

Secondly, the study sought to ‘draw easily deduced inferences from the data’ (Golder, 2000, p. 159). All the evidence was judged and considered for each case as part of an iterative reasoning that formed the basis of tentative conclusions. In each step new ideas and a greater appreciation of the data emerged, these initial inferences were recorded as part of an ongoing important research practice of recording insight.

Thirdly, from these inferences analysis moved consciously towards a better understanding. The evidence together with the study’s inferences was reconsidered to ensure that they were securely grounded in the evidence. Then as Golder (2000) recommended I intentionally looked for explanations and implications of the evidence. Structuring and organising the evidence by source type and the relevant critical time period with room for emerging themes facilitated this analytical stage and enabled the assessment of the ‘relative importance of causal factors’ such as the brand’s renewal processes and auditing practices (Golder, 2000, p. 159).

Fourthly an explanation of the historical development and longevity of each case was constructed. Explanations varied from detailed narratives to focused dot points depending on the status and nature of each case. Narrative discussion included key events and the interplay of causal factors that protected and renewed the corporate heritage brands over time. The focus was on identifying and explaining how corporate heritage brand management protect and renew brand heritage. These historical findings then directly informed the construction of theory respective to each individual case, case set and whole study

3.4.6 CASE STUDY ANALYSIS

Reasons for Within-case and Across-case Analysis

In this study, within-case and across-case analyses were important strategies that were used to synthesise diverse forms of case evidence. In the first instance each case was

regarded as a single unit of analysis. The diversity of evidence was integrated, synthesised and examined through the lens of the research questions and the extant body of literature. Each individual case was subsequently cross-analysed with its industry pair. As Eisenhardt (1991) explains, case insights rest on the replication of observation across the relevant units of analysis. Case findings were thus considered in context to their industry pair. In discerning congruence and divergence of the findings between each case pair, the findings moved toward explanatory propositions.

Finally, each of the four pairs were analysed across the relevant industries. Generalisations were developed through the observation of regularities and ‘elimination of erroneous conclusions’ (Eisenhardt, 1991, p. 622). For instance, consistent practices and characteristics of historical cases informed the development of theoretical propositions explaining the protection and renewal of corporate heritage brands. Similarly, practices applied and characteristics expressed by the contemporary cases were defining tenets of a typology. Variances between historical and contemporary cases illuminated the characteristics and practices specific to corporate heritage brands and those, which were not important.

Strategies for Case Analysis

A variety of different approaches can be adopted to analyse cases, the most appropriate for this study into corporate brand longevity were pattern matching, explanation building, time-series analysis and cross-case synthesis. These analytical strategies strengthened and sharpened the study’s findings.

Description of Analysis Strategies

I. Pattern Matching

Patterns that emerged in each case were compared with those that emerged first in each case’s pair and then contrasted alternatively with the other case pairs. Pattern matching the contemporary and historical case in each pair involved identifying points of variance in the strategies of the two and considering rival explanations to emerging explanations. In corroborating evidence across the case pairs ‘chance associations’ (Eisenhardt, 1991, p. 622) or developing a document that summarised the consistencies and nuances in each set eliminated coincidental similarities. The study’s design also facilitated this analysis

strategy, juxtaposing each historical corporate brand with a comparable contemporary brand.

II. *Explanation Building*

Explanation, a special form of pattern matching (Eisenhardt, 1991, p. 620) involved developing a detailed explanatory description of each case. Descriptions at first resembled narratives, which were a précis of the cases longitudinal development and historical endurance, providing an account of their longevity. This form of explanatory analysis also was useful in clarifying emerging conceptions of the evidence.

Following completion of the first set of cases, explanations became more precise. Comparison of each individual case explanation with its pair, and across each case set led to re-examination and development of an explanation of how organisations sustain corporate brands.

Yin (2009) warned of pitfalls that can arise during the explanation phase. These include drifting away from the topic of interest. Therefore, a case study database was developed that formally stored all the data. A strict chain of evidence was also followed to ‘verify the rigor’ of the research process and the ‘confirmability of the findings’ (Yin, 2009, p. 141). Further, the original purpose of inquiry was used to ensure that the research maintained its primary focus.

III. *Time-series Analysis*

A third analytic technique in the examination of case evidence was time-series analysis, particularly in the form of chronologies that set a ‘firm foundation in place for the conclusions of the study’ (Creswell and Miller, 2000; Patton, 2002, p. 91). Yin (2009, p. 144) argued that compiling of chronological events is frequently used in case studies and represents a ‘special form of time-series analysis’. The technique, rather than pure description, was analytically significant, focusing on ‘causal inferences’ (Yin, 2009, p. 148) to provide further insight into the events and practices that shaped the history of each case.

IV. Cross Case Synthesis

The final technique used to analyse case evidence was cross case synthesis. This involved synthesising the findings from the contemporary and historical case within each set, and also across each of the five case sets. The findings for each individual case were compiled in documents and organised by causal inferences to aggregate case evidence.

Further, documents that described the similarities and differences between contemporary and historical cases in each industry were ‘highly insightful’, raising the ‘possibility of a typology’ (Yin, 2009, p. 148). Analytic tables displaying the data for each individual case and organising case findings by causal inferences facilitated data aggregation. These documents were tools that facilitated the synthesis of case findings, enabling quality insight to the research problem.

Assurances of Quality of Analytical Results

Creswell (2003) noted the role of triangulation through the use of multiple sources and forms of evidence to enhance the validity of qualitative research. Other qualitative researchers (Creswell and Miller, 2000; Reige, 2003) have considered the importance of this procedure, with Eisenhardt (1989, 1991) and Beverland (2005a, 2005b) demonstrating its application in the context of case study research. This study used three processes to ensure the quality of evidence.

First, the study used multiple methods of data-collection. Second, the study collected data from primary and secondary sources. Third, the study derived the different types of evidence from multiple sources. The various forms served to corroborate and authenticate information. Often, new details emerged from historical forms of evidence that were ‘consistent with the testimony of primary sources’ (Beverland, 2005a, 2005b), enabling a greater understanding of the phenomena.

An audit trail is another way that this study established the credibility of qualitative research findings. The work of Creswell and Miller (2000) provided the basis for establishing a clear chain of evidence by clearly documenting the inquiry process through journaling and a research log. Use of these procedures throughout the study

formed a 'data collection chronology' (Golder, 2000, p. 16), clearly documenting the inquiry process.

In addition to obtaining ethical clearance for the research from the University's formal ethical committee (Appendix 1), the six principles of ethical conduct outlined in the Australia's National Statement guided the research. These principles are integrity, respect for persons over any anticipated benefits to knowledge, beneficence, justice, consent and, research merit and safety. I took a proactive stance to presenting an accurate account of information (Creswell, 2003). I respected each of the research sites and was cognisant of minimising any negative impact upon the negative impact. Individuals in authority were contacted ahead of time to gain access to research sites. Finally, the data will be kept for a minimum of five years to ensure that the data does not 'fall into the hands of other researchers who might appropriate it for other purposes' (Creswell, 2003, p. 66).

The inherent comparative approach and explicit application of comparative analysis techniques in this study strengthened the quality of analytical insight and credibility of results. Contradictory evidence represented an opportunity to challenge, clarify and extend the research findings. This was acknowledged and rival explanations were intentionally sought.

3.5 CONCLUSION

The research is comprised of two Studies. Study 1 longitudinally examined the recovery of two iconic corporate heritage brands, addressing the research question *how can corporate heritage brand management recover the corporate heritage brand after a crisis?* Study 1 applied historical archival research to two case studies. The longitudinal, retrospective study of the two corporate heritage brands, Tiffany & Co. and Burberry that experience structural corporate heritage brand decline provides relevant insight into how long-established corporate heritage brands can overcome a structural brand crisis.

Study 2 compared the brand heritage management practices of two corporate brand types, addressing the research question *how can corporate heritage brand management protect and renew the corporate heritage brand?* Study 2 was also of a case study design. The research design was inherently comparative, juxtaposing the brand heritage management of five corporate heritage brands with five contemporary corporate brands.

Data collection and analysis was based on two distinct but relevant approaches *viz.* (i) qualitative semi-structured interviews and (ii) historical research. In each stage data collection and analysis followed strict research protocols that were informed by the relevant literature (see appendices). Within-case and across-case analyses were important analytical strategies that facilitated the synthesis of the diverse forms of case evidence. Study 2 applied the case study strategies of pattern matching, explanation building, time-series analyses and cross-case synthesis to strengthen the findings.

The research extends earlier approaches by using archival materials and documents and interviews. The two discrete studies provide a strong yet interesting methodological approach to resolving complex, multifaceted research issues.

CHAPTER 4

BRAND HERITAGE RECOVERY: A STUDY OF TWO CORPORATE HERITAGE BRANDS

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4.1 INTRODUCTION

The management of corporate brand heritage is strategically significant, yet an under-investigated area is the restoration of brand heritage after a brand crisis. The literature tends to focus more on crisis management, or reputation damage. One approach to researching brand crises and recovery is the analysis of the experiences of brands over time. Longevity is characteristic of many corporate brands and indicative of the long-lasting value they can represent for organisations (Balmer *et al* 2006). Similarly, brand heritage is an important tool for reinforcing a brand's iconic nature and authenticity (Alexander, 2009; Beverland, 2006). To illustrate the significance of understanding and using brand heritage, Ferragamo, appointed an archivist in 1984 to initiate the preservation and perpetuation of the brand's design legacy (Young, 2010b).

Brand heritage is of formative significance to corporate brand identities and equity (Balmer, 2013), though few studies consider the implications of brand heritage for corporate brands. Study 1 examines brand crises, and how the reinstatement of brand heritage influences the endurance of corporate brands. The longitudinal evidence focuses on three periods significant to the identities of two iconic corporate heritage brands, Tiffany & Co. and Burberry. The contribution of the first study is demonstrating how long-established corporate brands can overcome structural brand crises, by restoring brand heritage. Another contribution is the identification of the roles of heritage custodianship and core brand competencies in facilitating management of corporate brand heritage.

4.2 LITERATURE REVIEW

The review spans five areas in the branding domain: luxury corporate brands, corporate heritage brands, maintaining corporate heritage, corporate brand revitalisation and corporate brand crisis, which inform the study.

Luxury Corporate Brands

In the industry media, luxury brands attract much discussion (for example, *Luxury Daily*, 2014; *Luxury Society*, 2014), and employment positions are offered such as ‘Flagship Sales Assistant – Luxury Heritage British Brand – Boutique Role – London’ (*Fashion Jobs*, 2014). In the scholarly literature, a luxury corporate brand has several components, of which heritage is of central importance (Beverland, 2004; Christodoulides *et al* 2009; Moore and Birtwistle, 2005). Corporate heritage underpins the exclusive status (Kapferer and Bastien, 2009) and enhances the aspiration quality of luxury brands (Keller, 2009).

For luxury fashion brands, delivering luxury brand consumption experiences through branded flagship stores that reference the past, to reinforce exclusivity and heritage, is another defining aspect of a luxury fashion brand positioning (Beverland and Luxton, 2005; Moore and Birtwistle, 2005; Moore *et al* 2010). The expression of heritage through the design of iconic products carrying symbolic value is likewise important (Fionda and Moore, 2009; Moore and Birtwistle, 2005).

Heritage is central to the success of luxury brands (Moore and Birtwistle, 2005; Fionda and Moore, 2009; Hudson, 2011). For example, Gucci’s heritage of ‘design and product development is at the core’ of the Italian fashion house’s ‘success’ (Moore and Birtwistle, 2004, p. 412). These corporate brands typically are associated with specific products that take or integrate the corporate brand, rather than with separate product brands.

Corporate Heritage Brands

Balmer *et al* (2006) identify brand image, reputation, communications, brand promise, core values and brand stewardship as key dimensions of corporate heritage brand management. Corporate communications are a means to integrate brand image and corporate identity (Blombäck and Brunninge, 2009), enhancing brand authenticity and relevance by drawing from the ‘story of heritage’ (Morley and McMahon, 2011, p. 9). Balmer (2011b) suggests that corporate heritage identities are powerful because they encapsulate identity, forming a potentially important dimension of a group’s collective memory.

Corporate heritage is central to the identity, equity and relevance of corporate heritage brands (Hudson, 2011). Moreover, it is a key to the continuing success of corporate heritage brands. It may be a particularly valuable tool in managing the tension between the past, present and future of corporate heritage brands (Urde *et al* 2007). Balmer's (2011b) notion of relative invariance reinforces the idea of heritage constancy. Thus strong corporate heritage brands engage in heritage branding, which is a process of examining, defining, activating, extending and protecting heritage.

Maintaining Corporate Heritage

Over time, corporate brands can forge a strong identity and positive brand associations. The British Monarchy brand offers an exemplar (Greyser *et al* 2006). The vast historical trajectory of the Monarchical brand is significant to the national identity (Balmer, 2011a, 2011b). The historical value inherent in the identity of long-standing corporate heritage brands can be an important organisation resource, enhancing brand equity (Wiedmann *et al* 2011b) and organisational continuity (Balmer, 2013). Corporate heritage is central to luxury corporate brand identity, underpinning luxury market positioning and enhancing perceptions of the luxuriousness of the value proposition (Miller and Mills, 2012). In approaching a brand's history strategically, management can construct a corporate heritage that drives the brand's current image and value proposition.

Business histories often relate engaging stories, with little contemporary relevance. Corporate heritage, however, 'clarifies and makes the past relevant for contemporary contexts and purposes' (Urde *et al* 2007, p. 6). Heritage provides a meaningful interpretation of history. Five themes relate to corporate heritage brands: delivering value, long-held core values, longevity, expression of the past symbolically through their communications and the belief that the brand's history is an important constituent of its identity (Urde *et al* 2007). Balmer (2011b) reconceptualises corporate heritage identity, placing greater emphasis on authenticity, trust and affinity.

Study 1 adopts the view that corporate heritage is an 'approach to corporate marketing that involves reference to the past [and future]. It encourages the engagement of consumers with the history of the brand, or the engagement of consumers with history through the brand' (Hudson and Balmer, 2013, p. 357). The definition captures the paradoxical and omni-temporal traits of heritage brands (Balmer, 2011b). Corporate

heritage is attributed special significance among temporal concepts such as business history because of its unique ability to derive legitimacy from the past, present and future (Burghausen and Balmer, 2014a, 2014b).

Hudson (2011) links the Cunard Line's corporate heritage to its identity. The 1997 Cunard Line acquisition by Carnival marked the beginning of the historic brand's turnaround. The historical content embraced in the new strategy was pivotal to the revival of the brand's luxury corporate heritage. That study illustrates the systematic implementation of the corporate heritage concept. Recent studies prompt a greater understanding of corporate heritage by defining, distinguishing and delimiting the concept (Balmer, 2013; Hudson and Balmer, 2013). However, scope for corporate heritage brand research in a luxury context is considerable.

Corporate Brand Revitalisation

Brand revitalisation has attracted significant attention from scholars (Keller, 1999). Brand revitalisation strategies form a continuum from modest adjustments to the brand proposition (de Chernatony, 1999), to radical reconceptualisations of the brand (Merrilees and Miller, 2008). Understanding how leaders can manage brands over time without undermining brand equity is important. Returning to the past in difficult times can be a key to the growth of a brand (Aaker, 2004). Accentuating historical brand elements through language, symbols and storytelling provides consumers with the stability and assurance of a romanticised past. Heritage implies authenticity, credibility and legitimacy to consumers (Alexander, 2009; Beverland, 2004, 2006; Leigh *et al* 2006).

Corporate Brand Crisis

Some scholars advocate that brand mortality is inevitable (Ewing *et al* 2009; Jevons *et al* 2007). They suggest that it is atypical of brand category leaders to experience long-term success. Thomas and Kohli (2009) more optimistically suggest strategies for revitalising declining brands. Reyneke *et al* (2012) recommend that luxury brands respond to economic downturns by refocusing and limiting capital expenditures. Notwithstanding, few empirical studies address these questions in the context of long-term change in brand health and performance. Most literature on brand crisis has a short-term focus (for example, Clarke, 2011; Rhee and Hadwick, 2011). For brand

reputation management, short-term crisis management emphasises appropriate, consistent communication skills; it does not illuminate understanding periods of long-term structural brand decline and strategies for recovery from such decline.

Point of Departure

Maintaining brand heritage is foundational to the strength of a corporate brand's identity. However, corporate brands are complex. Corporate brands may develop strong brand equity, but the brand's strength of identity can be compromised in the event of a major structural lapse. Study 1 contributes to the extant literature by identifying specific actions that brand management can undertake to restore heritage of a corporate brand after a structural brand crisis.

4.3 FINDINGS

The analyses identified turning points that delineated three periods, namely the foundational years; an interval of crisis; and subsequent ascendance. The longitudinal examination reveals three brand constructs that underpin the rise, fall and rise of Tiffany and Burberry, namely brand vision (Balmer and Gray, 2003; Balmer *et al* 2006), brand values (Urde, 2003; Urde *et al* 2007) and core brand competencies (Balmer, 2013).

Preview of Findings

Table 4.1 provides a preview of the findings from Study 1, outlining the events that shaped the foundation and early years, the corporate brand crisis and the recovery of the corporate heritage brands Tiffany and Burberry. For the Burberry study, the time difference between the first and second period is purposeful. The second period represented a significant turning point in the history of Burberry. A period of brand decline reached culminating in a crisis, followed by a period of recovery making it a suitable focus for insight into brand recovery. The preceding years although interesting, were comparatively uneventful. The periods chosen were dynamic and characterised by the greatest measure of change. The findings for each brand are presented next.

TABLE 4.1: PREVIEW OF FINDINGS

| Tiffany & Co. | Burberry |
|---|---|
| <i>Period 1: Foundation and prosperity</i> | |
| <p>Charles Lewis Tiffany’s vision is to be the leading American purveyor of silverware, jewellery and specialty items.</p> <p>Practices: Third party investment, strategic acquisitions, vertical integration and progressive decision-making. Implementation of marketing strategy that integrates publicity with complementary communication channels of event marketing (on an international and local level), community involvement, celebrity endorsement and public relations.</p> <p>C.L. Tiffany imbues brand values of integrity, quality, flair and diversity.</p> <p>Practices: Developing trust based stakeholder brand relations, introducing a stable pricing system, developing a quality product range, procurement of exclusive merchandise including significant gemstone acquisitions, developing an illustrious clientele, securing royal appointments and broadening stylistic sources of inspiration in company design.</p> <p>Firm matures, develops competencies in design innovation, merchandising and promotion.</p> <p>Practices: The passionate design leadership, the appointment of talented individuals, strategic acquisitions of impressive crown jewels, together with internal marketing initiatives including employee training, shareholding opportunities and potential to progress within the company supported the development of market leadership. Further, the leaders’ personal conviction inspires service excellence among Tiffany employees.</p> | <p>Thomas Burberry opens an outfitters shop with the vision of becoming a leading provider of outerwear for English gentleman.</p> <p>Practices: Develops relationships with industry stakeholder groups and building brand awareness through consistent advertising and strategic retail expansion. Specialist sporting publications and the endorsement of famous explorers strengthens brand-sport associations and Burberry’s market leadership.</p> <p>Core values are quality, classic British and exploration.</p> <p>Practices: Developing products to endure harsh climatic conditions that are tested by third party industries and are endorsed by explorers, forming part of an iterative development process. Burberry tailors standardised designs to the measurements of individuals, develops relationships with iconic personalities and explorers, while continuing to innovatively develop outerwear.</p> <p>Competencies in product innovation and marketing are central to Burberry’s position of sustained leadership in outerwear.</p> <p>Practices: Burberry’s ongoing commitment to product design and development, generative learning style, work with Lancashire manufacturers to develop the technical capabilities of materials supported the development of market leadership. The competency of marketing involves regular advertising, celebrity endorsement, strengthening of meaningful brand-stakeholder associations and legal protection of innovations to protect brand equity.</p> |

Period 2: Corporate Heritage Brand Crisis

Louis Comfort Tiffany resigns in 1918, leaving Tiffany & Co. without a charismatic leader or design visionary.

Practices: Advertisements in the *New York Times* continue. However, publicity dramatically declines giving established competitors and emerging jewellers an opportunity to gain market share.

Tiffany maintains core brand value of integrity and quality. Defining brand values of flair and diversity not as prominent.

Practices: Tiffany continues to maintain standards of quality resolutely avoiding discounting and strategically moving discounted stock off the main floor. Brilliant gemstones, design and diversity are not prominent, weakened by the conservative approach of the company's management team.

A lapse in core internal marketing practices adversely affects the key areas of expertise the firm had developed.

Practices: Loss of design leadership, abandonment of the position of design director, an absence of fresh talent, curbed investment initiatives, limited publicity, underdevelopment of internal design capabilities undermine Tiffany's design heritage.

A sharp downturn in the Japanese economy reveals an over-reliance on the Japanese market for sales compelling management to focus on cost minimisation.

Practices: Management minimise costs through the closure of sixteen stores, across the board cut and the termination of core operations. An aging consumer base and inappropriate extensions by sub-contractors undermines the brand's image.

Growing disconnection from core brand values of quality, exploration and classic British causes instability.

Practices: Burberry's licensing agreements, erratic distribution strategy and inconsistent retail environments undermine stakeholder perceptions of quality. Further, management eliminate Burberry's historically significant rainwear and outerwear divisions.

Burberry does not maintain investment in developing core competencies of product innovation and development.

Practices: Management undervalue the brand's heritage, abandon heritage divisions, reduces investment in textile and fashion innovation, adopt an unstable marketing strategy and make decisions that compromise the brand's authenticity.

Period 3: Corporate Heritage Brand Recovery

Stage 1 Regaining the corporate brand's vision

Walter Hoving, a charismatic and visionary leader, acquires a controlling interest in the firm. He strengthens the brand management team, leverages the firm's expertise in recruitment, to regain the brand's vision. Investments in corporate infrastructure and the development of new markets in other American cities are pivotal to the brand's growth. Hoving sharpens the brand's premium positioning implementing a retail and promotion strategy that includes transforming Tiffany & Co.'s Fifth Avenue Store, introducing a contemporary merchandise range and new anchor department.

Stage 2 Reconnecting the brand with its core values

Hoving manages Tiffany's reputation through swift action protecting the brand's image and affirming the significance of integrity as a value to the brand. He reconnects the brand with the core value of quality, flair and diversity by renewing the design-centred expression of Tiffany's historical essence, appointing a design director, holding lavish events that re-engage the press and developing a loyal following among American royalty with present-day designs.

Stage 3 Reviving core brand expertise

Hoving revives core corporate brand expertise by re-establishing internal marketing practices and extending these to internal branding expertise. Specifically through design centric appointments, ongoing investment in recruitment, staff development and inspirational brand championship to align employees with the brand's vision and values. He enhances brand capabilities through design policies and recruiting exceptional talent including Schlumberger who was instrumental to the restoration of design innovation to the brand's identity.

Stage 1 Regaining the corporate brand's vision

The board appoints Rose Marie Bravo as Chief Executive Officer of Burberry signally the brand's recovery. She realigns the business model, forms a strong brand management team that shares her vision and reactivates Burberry's heritage. Bravo purposefully leverages Burberry's heritage to redefine the brand's identity, define its strategic vision, initiates investments in strategic areas of operation. Retail growth is accelerated through company-owned stores especially in underinvested markets such as Russia, strategic long-term relationships with iconic retailers.

Stage 2 Reconnecting the brand with its core values

Reconnection to core values is guided by Bravo's desire to strengthen brand's contemporary appeal without compromising its authentic essence. Quality gains new meaning in a contemporary luxury context. Emphasis on sartorial fashion design transforms its classic British value and leaders reinterpret and evolve the value of exploration. Bravo streamlines Burberry's supply chain, invests in product development, makes strategic design oriented appointments, features popular British identities in marketing communications and redefines historical creations as democratic status symbols.

Stage 3 Reviving core brand expertise

Burberry revives its core competencies of product development, innovation and marketing and develops supportive areas of organisational expertise in internal branding, investing in the company's strategically significant historical competencies, renewing emphasis on textile performance and technical outerwear, adding key positions in design, introducing a highly innovative fashion range. Bravo also encourages cross-fertilisation of idea across design teams and extends Burberry's capabilities to include supply-chain management through her astute governance.

4.3.1 Case 1: Tiffany & Co.

Foundation and prosperity (1837–1887)

In 1837, Charles Lewis Tiffany and John Young established a fine goods and stationery store. The vision was to be the leading American purveyor of silverware, jewellery and specialty items (Purtell, 1971). A third partner injected the financial capital necessary to expand corporate infrastructure in 1841. After an acquisition of aristocratic diamonds in 1848 (Heydt, 1893/2010), Tiffany began manufacturing fine jewellery. Progressive decisions about silverware sourcing and production culminated in vertical integration with Moore's silverware company, increasing control over the supply chain (Zapata, 1993). Marketing shaped the implementation of brand vision (Koch, 1982; Loring, 1999). The Tiffany marketing strategy integrated publicity with other communication channels of event marketing, community involvement and celebrity endorsement. Important international events included a connection to the world's first transatlantic cable in 1858 (Mahoney and Sloane, 1974), whereas local events included Tiffany's exhibition of the Egyptian ruler Khedive's diamond-wedding gift to General Sherman's daughter (*The New York Times*, 1875).

C.L. Tiffany imbued the company with the values of integrity, quality, flair and diversity. His introduction of a stable price system, in contrast to retailers who haggled over prices (Zapata, 1993), was a tool for building consumer trust, and reinforcing the importance of integrity to the brand's essence. Quality found early expression in Tiffany's '*high character*' stock (Heydt, 1893/ 2010), with increasing emphasis on the pedigree of the stock. Tiffany's procurement of exclusive European merchandise supported an emergent position of prestige. The firm's awe-inspiring gemstone acquisitions, illustrious clientele, flourishing list of royal appointments, including the Empress of Russia (Heydt, 1893/2010), and legendary designs (*The New York Times*, 1878a, 1878b), embodied the brand's core value of flair. Diversity was a fourth defining value expressed through the magnificent creations of Tiffany designers that often drew on multiple stylistic sources of inspiration. Together these values defined the corporate heritage brand's essence.

The firm matured, developing competencies in design innovation, merchandising and promotion. These three distinct areas of expertise contributed to the brand's leadership. Internal marketing initiatives, including employee training, and shareholding

opportunities, enhanced employee loyalty and Tiffany's attractiveness as an employer. For design innovation, Tiffany invested in building a strong design team and developing an infrastructure to support silverware production. Edward Moore became Tiffany's principal designer. He instigated ongoing investments in design education, training, most remarkably the 'Tiffany' school and an extensive design library (Zapata, 1993). The merchandising competency included procurement, visual merchandising and customer service. Procurement improved with the 1845 appointment of George McClure, an eminent gemologist, (Loring, 1999), and notable acquisitions like Empress Eugenie's crown jewels in 1887 (Harlow, 1998). Employment of a window dresser enhanced merchandising with unusual displays, communicating the store's merchandise offering to consumers (Moore and Hyams, 1990). Customer service expertise was integral to Tiffany's merchandising competency. Charles Tiffany's personal conviction of the consumers' authority, and service-oriented promotions, supported a high service standard. The company's promotion skills ensured that all facets of the brand's expertise were leveraged to enforce the brand's unique identity.

Corporate heritage brand crisis (1918–1955)

The second period, the brand crisis era, commenced with the turning point of Louis Comfort Tiffany's resignation in 1918. He had inherited the controlling interest in the firm in 1902 (*The New York Times*, 1902). He maintained the vision of being America's leading jewellery, silverware and specialty retailer, and created Tiffany's first artistic jewellery department. His resignation in 1918, however (Johnson *et al* 2005), left Tiffany without a charismatic leader or design visionary. Although advertisements in *The New York Times* continued, publicity dramatically declined after his resignation, which gave established competitors, like Cartier, an opportunity to gain market share.

Although Tiffany maintained its core brand values of integrity and quality, the brand's defining values of flair and diversity were less prominent. The firm's management maintained Tiffany's integrity by pre-serving policies and legally defending the equity residing in its trademark (*The New York Times*, 1933). Tiffany continued to maintain quality, resolutely avoiding discounting, aside from one major sale in 1940, choosing strategically to move discounted stock away from the main floor. The expression of Tiffany's brand value of flair, associated with a heritage of brilliantly rare gemstones and consummate artistry, waned. Flair therefore was no longer a unique and

differentiating core value. Diversity, similarly, although expressed in Tiffany's merchandising assortment, was weakened by management's conservative interpretation of the brand value.

The firm's expertise in design innovation, merchandising and promotion were adversely affected by a lapse in core internal marketing practices. To illustrate, after Louis C. Tiffany resigned in 1918, the position of design director was vacant until 1955 and no Board level design specialist appointed. Design leadership loss and under-investment in developing internal design capabilities undermined Tiffany's design heritage. An absence of fresh talent and limited investment initiatives weakened the corporate brand. Without significant gem purchases, Tiffany created an opportunity for a major competitor, Harry Winston, to establish a similar competency. Promotional competency also waned, undermining the brand's brand associations. From 1942 to 1954, Tiffany advertisements and publicity scarcely appeared in *The New York Times*, New York's premier newspaper. The impacts of World War II on the firm might partially explain the absence from 1942 to say 1946, however the branding crisis continued into the 1950s.

Corporate heritage brand recovery (1955–1965)

In 1955, Walter Hoving acquired a 52 per cent controlling interest in the firm and began to restore Tiffany as the leading American jewellery, silverware and specialty retailer (*The New York Times*, 1955; Zipser, 1955). An analysis of the Tiffany corporate heritage brand recovery process, using literature guided concepts such as authenticity (Beverland, 2004, 2005a, 2006; Balmer *et al* 2006), brand identity (Balmer and Gray, 2003; Balmer *et al* 2006; Balmer, 2011a) and core values (Urde, 2003; Urde *et al* 2007), suggests an overlapping, three-stage process. That is, corporate heritage recovery required (i) regaining the corporate heritage brand's vision; (ii) reconnecting the brand with its core values; and (iii) reviving core brand expertise.

Stage 1, to regain the brand's vision, Hoving strengthened Tiffany's brand management team, leveraging the firm's recruitment expertise to make strategic design-centric appointments. Hoving's reportedly charismatic and visionary leadership strengthened Tiffany's vision and inspired stakeholder buy-in. Investments in corporate infrastructure, including the acquisition of Schlumberger Inc., the New York jewellery firm (*The New York Times*, 1956a), and the development of new markets, were pivotal

to Tiffany's growth. He implemented a bold retail and promotion strategy (*The New York Times*, 1960). The retail component entailed the complete transformation of Tiffany & Co.'s Fifth Avenue store and the introduction of a contemporary merchandise range expressing Tiffany's personality, sharpening its premium positioning. A new anchor department (Schlumberger) was central to a distinct co-branding strategy, leveraging unique associations with celebrity designers.

Stage 2 requires reconnecting the corporate heritage brand with its core values. Historically, the corporate heritage was associated with four corporate core values: integrity, quality, flair and diversity. Hoving actively managed Tiffany's identity to affirm the ongoing significance of integrity as a brand value, responding to reputation-based threats (*The New York Times*, 1989) to ensure consistent brand delivery across stakeholder groups. In 1960, reports of a leading American jeweller using '*artificially colored canary diamonds and black pearls*' placed Tiffany's reputation in a questionable position (Alden, 1960, p. 35). Hoving managed Tiffany's reputation through swift press action, assuring external stakeholders that Tiffany was not the jeweller in question. His public defence strengthened the brand's essence and protected the brand's image.

Hoving reconnected the corporate heritage brand with the core value of quality through a design-centred expression of Tiffany's historical essence. He connected the significance of that value to the firm's vision of renewed design leadership, engaging and aligning new employees with the brand's values. Treux (1975, p. 84), for instance, the newly appointed design director, was exhorted by Hoving not to think what a piece would cost; '*that is not your business ... your only concern is quality of design!*'

Hoving also reconnected the heritage brand with its core value of flair. Schlumberger's naturalistic creations earned Tiffany and Schlumberger a loyal following among American royalty, including Grace Kelly. These connections were important in recovering the core value of flair. Further, Hoving re-engaged with the press, held a housewarming party (featuring champagne in delicate crystal glasses of pale green, yellow and pink) to celebrate the store's renovations (*The New York Times*, 1956b) and appointed a publicity director to re-establish Tiffany's high profile positioning (Mahoney and Sloane, 1974, p. 50). Tiffany secured additional publicity for its starring

role in the film *Breakfast at Tiffany's* (Archer, 1960; *The Australian Women's Weekly*, 1961; Weiler, 1961).

Finally, completing Stage 2, Hoving reconnected the corporate heritage brand with its fourth core value, diversity. The reconnection was achieved through a renewed emphasis on originality in design, production and merchandising. Designers drew on diverse sources of inspiration, celebrating Native American, Japanese and European cultures, and the splendour of nature. Tiffany pieces harmoniously incorporated various gemstones including Montana sapphires and Mexican fire opals in unique creations.

Stage 3 required Tiffany to revive its core corporate heritage brand expertise. Further, internal marketing was critical because it was basic to Tiffany's design, merchandising and promotional ingenuity. Hoving re-established and then extended internal marketing practices to internal branding expertise, through his design-centric appointments, ongoing investment in recruitment, staff development and inspirational brand championship, to align employees with Tiffany's vision and values.

Design policies and hiring exceptional talent further enhanced brand capabilities. Schlumberger, appointed Vice-President in 1956 (Beaton, 1956), restored design innovation to the brand's identity. His fabulous haute jewellery and vibrant creations, including the iconic 'Bird on a Rock' setting of the famous Tiffany yellow diamond, distinguished the house of Tiffany for design once again. Hoving installed Moore as visual-merchandising director and effected ongoing investments in merchandising initiatives, inviting prominent New York social figures to design Tiffany table settings (Moore and Hyams, 1990). Hoving also positioned Tiffany to procure a newly discovered form of deep-blue zoisite, later named Tanzanite, for a jewellery line introduced in 1968. In 1969, the firm entered an official partnership with the Tanzanian government to market Tanzanite exclusively (Purtell, 1971). These various tactics re-asserted the brand's iconic nature to consumers. In summary, the three-stage process of regaining the corporate heritage brand's vision; reconnecting the brand with its core values; and reviving core brand expertise, adequately explains the recovery of Tiffany's heritage. Assertive leadership was a major trigger to the recovery process. In the subsequent decade, Tiffany's sales volume increased 170 per cent and profits over 900

per cent (Mahoney and Sloane, 1974), reflecting the corporate heritage brand's remarkable transformation.

4.3.2 Case 2: Burberry

Foundation and prosperity (1856–1910)

In 1856 Thomas Burberry, a draper's apprentice, opened an outfitters shop in Basingstoke, with a vision of becoming a leading provider of outerwear for English gentlemen. That vision was underpinned by his values and reinforced by a competency in crafting all-weather attire for outdoor pursuits. Burberry achieved his ambition by developing relationships with industry stakeholder groups, building brand awareness through advertising and strategic retail expansion in the form of a London flagship store. That store, together with consistent advertising, supported Burberry's brand market position as a quality outfitter. Regular advertisements in London's foremost newspaper *The Times* initially built brand awareness, whereas specialist sporting-publications enhanced Burberry's positioning through brand-sport associations. Advertisements in the *Alpine Journal* from 1901 (Parsons, 2002), for instance, built Burberry brand preference among the mountaineering community. The endorsement by famous explorers, including Norwegian Noble Peace Prize winner Fridtjof Nansen, strengthened Burberry's market leadership.

Quality, classic British and exploration were core values that underpinned Burberry's position and inspired the brand's actions. The functionality, durability and form of its outerwear expressed Burberry's core brand value of quality. Explorers and third party industries tested Burberry products developed to endure harsh climatic conditions, as part of an iterative process, providing feedback critical for aligning products with stakeholder needs. Tailoring was important for underpinning Burberry's quality outerwear. Careful fitting of a standardised design to an individual's personal measurements was vital to a garment's suitability for performance in outdoor pursuits, especially mountaineering (Parsons, 2002). Classic British was expressed in the tailored form of Burberry garments, advertisements and Burberry's relationship with iconic English personalities. Burberry's core brand value of exploration was strengthened by explorer endorsements and innovative developments in outerwear. Indicatively, Sir Ernest Shackleton wore Burberry's patented Gabardine on Arctic expeditions, and later,

Lord Kitchener wore Burberry's Trench coat in World War I (Steele, 2010). Both products became iconic symbols of this Classic British value.

Competencies in product innovation and marketing were central to Burberry's position of sustained leadership in outerwear. The first competency was underpinned by Burberry's ongoing commitment to product design and development and his generative learning style. Typically, he worked with Lancashire manufacturers to develop and later improve the technical capabilities of Gabardine, the waterproof textile (Parsons, 2002). Marketing was a supportive competency that increased consumer-brand awareness and preference for the Burberry brand. Along with regular advertising and celebrity endorsement, Burberry strengthened meaningful brand-stakeholder associations and limited the impact of rivals through the legal protection of innovations. By registering Gabardine as a trademark in 1879, and the Equestrian Knight logo in 1901 (Parsons, 2002), Burberry protected its brand equity.

Corporate heritage brand crisis (1990–1997)

A sharp downturn in the Japanese economy in the early 1990s revealed Burberry's over-reliance on the Japanese market for sales, compelling management to minimise costs. The closure of 16 stores (Sidney, 1995), across-the-board cuts (*The Northern Echo*, 1991), and the termination of core operations only aggravated stakeholder relations. Burberry's marketing communications conflicted with corporate brand practice, giving rise to mixed brand meanings and an incongruous identity. Middle-aged, conservatively attired British models continued to project Burberry's dismal image as a producer of monochromatic raincoats (Cope, 2001). Through inappropriate extensions, sub-contracted manufacturers undermined Burberry's market position (Heller, 2000).

A primary reason for Burberry's instability was its growing disconnection from its core brand values (quality, exploration and classic British). Marketing communications continued to emphasise quality through conventional tailoring, but Burberry's doubtful licensing agreements and erratic distribution strategy undermined stakeholder perceptions of quality. Burberry products varied in quality as did the retail environments where Burberry distributed through '20 small shops in Knightsbridge alone' yet not in Harrods, Britain's premier department store (Heller, 2000). In 1995, management's decision to eliminate Burberry's rainwear and outerwear division (Sidney, 1995),

removed a historically valuable avenue of expression for Burberry's core value of exploration.

Burberry's competitive advantage in outerwear lapsed when the brand did not sustain investment in developing its competencies of product innovation and development. In 1995, Burberry's Chief Operating Officer labelled Burberry's rainwear and outerwear business as a '*limited operation*' (Sidney, 1995, p. 10). That attitude, towards a historically important competency, indicated management undervalued Burberry's rich heritage, culminating in the division's abandonment. Burberry, however, continued to rest upon the success of a solitary textile design, the emblematic plaid first incorporated into its trench coats in 1924. The lack of textile and fashion innovation, together with Burberry's unstable marketing strategy weakened Burberry's reputation.

Corporate heritage brand recovery (1998–2005)

Rose Marie Bravo, former President of Saks Fifth Avenue, became Chief Executive Officer of Burberry in 1997 (Lockwood, 2004). The appointment signalled a turnaround for the recovery of the corporate heritage brand. The analysis of the Burberry corporate heritage brand recovery process identified a similar process to the Tiffany findings. That is, a three-stage recovery process that encompasses: (i) regaining the corporate heritage brand's vision; (ii) reconnecting the brand with its core values; and (iii) reviving core brand expertise.

Stage 1, to regain the corporate heritage brand's vision, Bravo realigned the largely outdated business model (Moore and Birtwistle, 2004). Bravo purposefully leveraged Burberry's heritage to redefine the corporate brand's identity. Thus, Burberry's heritage was reactivated to define its strategic brand vision as a leading luxury fashion brand with a unique British sensibility. Bravo formed a strong brand management team that shared her understanding of the corporate heritage and initiated investments in strategic operations. First, she leveraged Burberry's unique assets and capabilities, striving for a higher level of integration across brand operations (Burberry, 2004/2005). Second, she accelerated retail growth through company-owned stores and development of long-term mutually beneficial relationships with retailers, including Harrods. Finally, Burberry pursued growth in under-invested markets by opening stores in countries, such as Russia and Italy (Burberry, 2004/2005).

Stage 2 requires reconnecting the corporate heritage brand with its core values. Historically, the Burberry core brand values were quality, exploration and classic British. The reconnection to core brand values was guided by a desire to strengthen the brand's contemporary appeal, but without compromising the brand's authentic essence. The core brand value of quality gained new meaning in a contemporary luxury context. In addition to decisions to streamline Burberry's supply chain and invest in product development through strategic design-oriented appointments, enhanced the quality brand value. Further, Burberry placed emphasis on sartorial fashion design to transform the brand's core value of classic British. Notable British identities with a popular impact, including Lord Frederick Windsor, featured strongly in marketing communications (Fallon, 2000).

Leaders reinterpreted the heritage of exploration and evolved the core brand value. That particular value explicitly leveraged the brand's position of leadership in outerwear, thus enriching its history-defining creations as enduring icons. Christopher Bailey's appointment as creative director in 2001 was especially instrumental. His design-centric interpretations of Burberry icons, including the famous trench coat, were foremost in his contemporary collections (Fallon, 2001; Kapner, 2001; Meagher, 2008). His purposeful appropriation of Burberry's unique heritage of exploration, and fashionable articulation of Burberry icons in the form of democratic status symbols, engaged a new generation of stakeholders with the core value. The Burberry findings indicate that a brand's values may need adjusting and can be purposefully advanced over time.

Stage 3 required Burberry to revive its core brand competencies of product development, innovation and marketing, Bravo developed supportive areas of organisational expertise, including internal branding, an important means for the reinvigoration of historically significant competencies. In 2002, the Burberry Group successfully floated on the London Stock Exchange (Conti, 2002; Hawkes, 2002), which strengthened the luxury brand's financial standing. Investments were strategically oriented with the company's historical competencies giving priority to product development and innovation.

Burberry placed distinct emphasis on textile performance and technical outerwear, added key positions in design, and introduced a highly innovative fashion range, drawing on Burberry's distinct British heritage. Bravo encouraged cross-fertilisation of ideas across design teams to sustain brand innovation, and through her astute governance, extended Burberry's core capabilities to include supply-chain management. In summary, the three-stage process of regaining the corporate heritage brand's vision; reconnecting the brand with its core values; and reviving core brand expertise, adequately explains the recovery of Burberry's corporate heritage (1998–2005). New and reinvigorated management leadership was instrumental in the major transformation of the Burberry corporate heritage brand.

4.4 CONCLUSION

The aim of Study 1 was to examine how luxury organisations manage corporate heritage to recover and enhance the corporate heritage brand. A longitudinal examination of two iconic corporate heritage brands shows how corporate heritage can affect the endurance of corporate heritage brands. The analysis of the Tiffany and Burberry luxury brands illustrates how corporate heritage can be lost and then restored. A three-stage, corporate heritage brand recovery process is identified as a conceptual and grounded contribution.

CHAPTER 5

CORPORATE HERITAGE BRANDS VERSUS CONTEMPORARY CORPORATE BRANDS

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5.1 INTRODUCTION

Data Analysis I compares the brand management practices of five corporate heritage brands with five contemporary corporate brands in commensurate industries, ten cases in total. The research design is inherently and deliberately comparative, providing for the application of comparative logic and isolation of practices particular to corporate heritage brands. The analysis juxtaposes two corporate brand types across five industries and reveals the complex and developmental nature of brand heritage management. The comparisons in this data analysis are as follows:

Wine Industry

Corporate heritage brand: Tyrrell's

Contemporary corporate brand: Sirromet

Jewellery Industry

Corporate heritage brand: Percy Marks

Contemporary corporate brand: LeGassick

Pearling Industry

Corporate heritage brand: Paspaley

Contemporary corporate brand: Broken Bay Pearls

Hospitality Industry

Corporate heritage brand: The Huka Lodge

Contemporary corporate brand: The Henry Jones Art Hotel

Fashion Industry

Corporate heritage brand: Rodd & Gunn

Contemporary corporate brand: Ubermen

Brand heritage management has four core dimensions; brand essence creation, brand continuity, brand protection and brand renewal. Each of the four different elements of brand heritage management consists of several minor components. The chapter examines these four different elements across the two types of corporate brands to draw out a series of best practice principles. The chapter presents a detailed discussion of

each principle. After each principle is discussed, a relevant proposition there is a final summary and associated proposition.

Section 5.2 previews the core principles that emerge from the interview component of Study 2. The four principles of brand essence creation, brand continuity, brand protection and brand renewal are covered in Sections 5.3, 5.5, 5.7 and 5.9. Following a detailed summary of each of these principles, the four propositions are in the Sections 5.4, 5.6, 5.8 and 5.10. Then in 5.11 the chapter closes with a summary of Data Analysis Part I.

Preview of Findings

The presentation of the findings focuses on: (1) brand essence creation (2) brand continuity (3) brand protection and (4) brand renewal. I identify several core differences between corporate heritage brands and contemporary corporate brands. Table 5.1 previews the findings the four components of corporate heritage brand management.

5.2 BRAND ESSENCE CREATION

Brand essence refers to the essential character of a corporate brand, relating to its brand identity and brand values. Corporate heritage has been conceptualised as a dimension of brand identity (Balmer, 2013; Urde *et al* 2007; Urde and Greyser, 2015). The chapter now compares brand essence creation between corporate heritage brands and contemporary corporate brands. Brand essence creation has three components: corporate heritage, personality and quality. The evidence suggests that quality was significant to the identity of and addressed by both corporate brand types. That leaves the possibility of different emphases in the other two components, corporate heritage and personality. The findings show brand essence creation has four aspects:

TABLE 5.1 PREVIEW OF THE FINDINGS

| Brand Essence | | | |
|--------------------------------------|---|---|--|
| | Heritage | Personality | Quality |
| Contemporary Corporate Brands | <i>For contemporary corporate brands, brand heritage of minor significance to brand essence</i> | <i>For contemporary corporate brands brand personality is of central significance to brand essence</i> | <i>Quality is of central significance to brand essence</i> |
| Corporate Heritage Brands | <i>For corporate heritage brands, brand heritage is of great significance to brand essence</i> | <i>Personality is a supportive component that is of secondary significance to brand essence</i> | <i>Sustained traditional quality is of central significance to brand essence</i> |
| Brand Continuity | | | |
| | Consistency | Constancy | |
| Contemporary Corporate Brands | <i>Consistency was the primary strategy that contemporary corporate brands used to develop a track record and develop continuity</i> | <i>Not applicable</i> | |
| Corporate Heritage Brands | <i>Consistency, especially with brand quality and communication, was a basis for developing brand continuity</i> | <i>Corporate heritage brands went beyond maintaining consistency, demonstrating constancy</i> <i>Corporate heritage brands were absolute in how they approached brand identity and uncompromising in how they approached core brand values</i> | |
| Brand Protection | | | |
| | Brand Architecture | Brand Standards | |
| Contemporary Corporate Brands | <i>Contemporary corporate brands took a modern approach to brand protection in which developing brand architecture and strategies reinforcing core brand elements were of primary significance</i> | <i>Not applicable</i> | |
| Corporate Heritage Brands | <i>Corporate heritage brands had an established brand architecture which was a foundation for the brand's protection yet not of primary significance</i> | <i>Brand standards were very significant to the protection of the corporate heritage brands and perpetuation of their authentic brand heritage</i> | |
| Brand Renewal | | | |
| | Scope | | |
| Contemporary Corporate Brands | <i>Contemporary corporate brands fewer constraints in brand renewal than the corporate heritage brands in brand renewal. The scope of brand renewal was significantly broader and scope was significantly broader</i> | | |
| Corporate Heritage Brands | <i>Corporate heritage brands had more constraints than their contemporary counterparts in brand renewal.</i> <i>The renewal processes was moderated by the corporate heritage brands' essence</i> | | |

The analyses show brand essence creation of corporate heritage brands has two aspects:

- (1) Brand heritage as a major component of a corporate heritage brand's essence.
- (2) Brand personality as a minor component of a corporate heritage brand's essence.

The chapter details each of these aspects.

Contrastingly, brand essence creation of contemporary corporate brands has the following two aspects:

- (1) Brand heritage as a minor component of brand essence for contemporary corporate brands essence.
- (2) Brand personality as a major component of brand essence for contemporary corporate brands.

For the purposes of this research on brand heritage management, how the contemporary corporate brands approached brand heritage was of particular interest. Therefore, for the brand essence creation of contemporary brands the chapter details only the brand heritage component.

5.2.1 Brand Essence Creation in the Wine Industry: Comparison of Tyrrell's and Sirromet

The chapter now compares the approaches of the corporate heritage brand Tyrrell's and the contemporary corporate brand Sirromet to brand essence creation. The comparison of the two brand types shows several core differences.

Corporate Heritage Brand: Heritage as a major component of brand essence

Heritage (that is, brand heritage) was a major component of brand essence for the Tyrrell's corporate heritage brand. The leadership team recognised that Tyrrell's heritage of '*pioneering achievements*' spanning over one hundred and fifty years was greatly significant to the brand's continuity. Tyrrell's heritage '*gives the brand a sense of strength and solidarity*' which leaders recognise is a distinct '*advantage*'.

Leaders valued heritage as a defining element of the brand's essence and current identity. Heritage, as a Tyrrell's fifth generation manager explains, gives the corporate heritage brand:

The relevance...it is Tyrrell's essentially. With that heritage it gives people confidence because with heritage comes knowledge, comes expertise.

Heritage was an invaluable resource for the Tyrrell's corporate heritage brand. Tyrrell's heritage encompassed its unique provenance, historically significant assets in the form of vineyards and winemaking equipment, special qualities such as perseverance developed through endurance, inherited knowledge and expertise refined through iterations of experiential learning.

Tyrrell's heritage is a compelling tool for the renewal of the corporate heritage brand. Each generation of leadership powerfully contributes to the corporate brand, drawing upon past lessons, challenging internal prejudices and reinterpreting their inheritance to advance the brand's legacy. Bruce Tyrrell pioneered the now renowned varietal of Semillon. Now his son Chris is ushering a greater emphasis on the brand's heritage, returning to traditional equipment and techniques, reapplying traditional techniques in innovative ways and divergent contexts, and retro labelling to show 'another generation of what the history was like'. He explains,

If you've got these resources why not have a bit of fun with it at the same time and try and create something people are going to be talking about in 50 years' time, which is where we're at and we're only about five years into it, which is a really exciting time.

Bruce Tyrrell emphatically asserted that the corporate brand's authentic story is factually grounded '*family history is wonderful magic you can weave because it's not made up bullshit. It's true – you're telling stories that actually happened*'. The facts underpinning the historical case's heritage imparted a powerful element of credibility and a depth of authenticity. Heritage was of importance to the corporate heritage brand's essence and current identity.

Corporate Heritage Brand: Personality as a minor component of brand essence

Personality was a minor component of the corporate heritage brand's essence. Tyrrell's deliberately developed the personality dimension of the brand's essence to appeal to current stakeholders. Core strategies in developing this dimension included personification and the creation of user imagery through events, strategic sponsorship and modern advertising. For Tyrrell's maintaining a quiver of young employees was

significant to the attribution of youthful qualities to the brand especially those that supported organisational creativity,

...so it will allow us to inject a bit of new blood into our winery.

As too, was a caricature of Bruce Tyrrell:

I turned myself into a little cartoon character. This little fat guy with glasses. And it was, it was amazing, the reaction. Because it personalised it. It was different to what was out there.

Developing the personality dimension of the Tyrrell's brand essence was significant in balancing its paradoxical nature of appealing across past and present contexts. Tyrrell's digital strategies supported the perpetuation of corporate brand mythology. Avenues including Facebook and Twitter were modern platforms that enabled the brand to interact with and engage with stakeholders. These interfaces made the brand's story accessible to a new generation of consumers.

Contemporary Corporate Brands: Heritage as a minor component of brand essence

Heritage was a minor component of the contemporary brand's essence. The contemporary corporate brand deliberately developed its heritage quotient to enhance credibility and legitimacy. Sirromet purposefully enriched heritage through storytelling, symbolism and traditions. Leaders leveraged storytelling to enhance the brand's heritage, integrating the early history of the Queensland wine industry, which has its origins in the 1850s, to convey continuity. Brand storytellers imbued artefacts, including an Austro-Hungarian winepress from 1793, with rich symbolic associations. Sirromet traditions include a traditional foot-crushing event, 'Annual Harvest Day', which has its beginnings in the rich wine heritage of France. Sirromet's leadership team demonstrated an awareness of the opportunity to build an idealised heritage, which inspired and motivated leadership teams. However, heritage was an ancillary rather than primary focus of the brand.

5.2.2 Brand Essence Creation in the Jewellery Industry: Comparison of Percy Marks and LeGassick

The chapter now compares the approaches to brand essence creation of Percy Marks with LeGassick. The analyses begins with the corporate heritage brand, followed those from the contemporary corporate brand.

Corporate Heritage Brand: Heritage as a major component of brand essence

Heritage was a major component of brand essence for the Percy Mark's corporate heritage brand. The leadership team recognised that heritage was of significance to the brand's continuity. The current Managing Director explained that:

...not many fourth generation businesses have the history that we have associated with gemstones, particularly opals, was where the business was founded.

Heritage was an invaluable resource for the corporate heritage brand. Percy Mark's pioneering opal heritage, spanning over one hundred years, and encompassed the corporate brand's gemstone intelligence and expertise. Leaders esteemed heritage as a defining element of the corporate heritage brand's essence, which signifies authority, distinction and longevity. For Cameron Mark's any explicit use of the corporate brand's history was always subtle and always factually grounded:

...we don't play – while history is important to us, we have the thing, I think, I think, jewellers opal and gem merchants since 1899. It's quite subtle, but our advertising is quite modern.

The leadership team subtly balanced heritage and contemporary brand elements. However, the overly cautious approach hampered the operationalisation of heritage as a powerful resource with contemporary salience. Nonetheless heritage was important to the corporate heritage brand's essence and current identity.

Corporate Heritage Brand: Personality as a minor component of brand essence

Personality was a minor component of the corporate heritage brand's essence. The brand's personality was a significant way of making a connection with a contemporary audience.

...you have to be relevant in the market. You can't be old fashioned or fuddy-duddy.

Percy Mark's deliberately developed the personality dimension of the brand's essence to appeal to current stakeholders. Core strategies in developing this dimension included personification and the creation of user imagery through events and modern advertising. Social media was an important conduit to the brand's marketing messages, personalising the corporate brand. Balancing historical contemporary brand elements

posed a challenge for leaders who acknowledged that they were ‘*a little behind*’ in developing a salient brand personality.

Contemporary Corporate Brand: Heritage as a minor component of brand essence

Heritage was a minor component of the contemporary brand’s essence. LeGassick deliberately developed its heritage quotient to enhance credibility and legitimacy. Leaders enriched heritage purposefully through storytelling, symbolism and traditions. Consumer brand storytelling was a means of educating stakeholders of the brand’s family origins and develop brand meaning. LeGassick’s story differentiated the brand from competitors and affirmed to stakeholders its trustworthiness.

Leaders operationalised LeGassick’s values and embedded these in the brand’s culture through traditions. They recognised that the brand’s story was significant to the brand’s continuity. In documenting the brand’s emergent story leaders were building an integral future resource:

Well what we're working on at the moment is basically going back to our grassroots and creating a story about LeGassick and taking that story with us for the next 10 years and ensuring that it's not lost. Something that we sat down about 12 months ago and we really pulled apart. Not just the jewellery of LeGassick, the actual family. So we sat down and we documented basically our whole family's history. What we want to do is do something with that to get that out there to the next generation. Because we believe it's going to be important long term for our brand.

However, heritage was an ancillary rather than primary focus of the brand.

**5.2.3 Brand Essence Creation in the Pearling Industry:
Comparison of Paspaley and Broken Bay Pearls**

The chapter now contrasts the brand essence creation approaches of the corporate heritage brand Paspaley with the contemporary corporate brand Broken Bay Pearls.

Corporate Heritage Brand: Heritage as a major component of brand essence

Heritage was an invaluable resource for Paspaley. The leadership team recognised that heritage was of great significance to the brand’s continuity. Paspaley’s heritage was absolutely ‘*vital*’ because as the general manager explained:

...so few businesses can tell a story as authentic as what we can. The romance around the story even when you hear staff talk about how grandfather Nick had the dream when he was on his lugger that he was going to find a beautiful pearl the following day and in fact did. Which made him so nervous by not being able to tell the rest of the crew because it would have been the equivalent in value to pay their wages for an entire year. All he wanted to do was get to shore. As a result of that dream he saved all of their lives because his boat was one of the few that was not hit by a cyclone. What a great story. Because you can't help but go wow...

Paspaley's 'pioneering pearling heritage' encompassed its unique expertise, inherited knowledge and established wisdom. More particularly, Paspaley's heritage comprised the revolutionary scientific discoveries, adventure and perfection that were defining elements of the brand's historical development. Contemporary leaders admired the 'rarity', value and power of the brand's story in appealing to current consumers. They valued heritage as a defining element of the corporate heritage brand's essence and current identity, as the following quote illustrates:

...the stories are truly wonderful. That's the point. They are wonderful. They are adventurous. People love a sense of adventure. Pearls. Paspaley gives them that. It's escapism.

Nicholas Paspaley's legacy has defined the brand's authentic heritage. His own story of remarkable discovery embedded in the brand narrative. Paspaley's story is a powerful asset in the hands of contemporary leaders. Through storytelling the leaders transform the brand's illustrious history into a powerful heritage both authentic and emotionally engaging. Leaders were inspired by the authenticity of the brand's heritage. Consequently they are diligent to ground storytelling in fact. The General Manager passionately explained,

...they're real stories. There's nothing that's artificial about it. Again I can't emphasise enough that's what sets up apart from anything. It's so important. It's not a factory. It's not made in China.

The corporate brand's story formed a cornerstone of contemporary advertising which leadership use as a storytelling medium to educate consumers of the rarity and authenticity of the corporate brand. Heritage was of importance to the corporate heritage brand's essence and current identity.

Corporate Heritage Brand: Personality as a minor component of brand essence

Personality was a minor component of the corporate heritage brand's essence. Leaders deliberately developed the personality dimension of the brand's essence to appeal to current stakeholders. For Paspaley, developing personality involved managing consumer perceptions of exclusivity and attainability. Leaders sought to extend the brand's salience to an aspirational set of consumers by softening the corporate heritage brand's prestigious status,

You've got to appeal to your mainstream customer. So the process is ongoing. It's about making sure the building blocks are in place and to make sure that the brand will continue to evolve. My focus is on making it more attainable whilst not walking away from the core values of the brand.

Developing the personality dimension of the corporate heritage brand's essence aided in balancing its paradoxical nature of appealing across past and present contexts. Core strategies in developing this dimension included personification and the creation of user imagery through events, strategic sponsorship and modern advertising. The leadership team leveraged the strategy to anthropomorphise Paspaley, imbuing the corporate brand with historical significance and legendary status. Paspaley's digital strategies supported the perpetuation of corporate brand mythology. Modern interfaces that included Facebook, made the corporate brand's story accessible and engaging for a wider consumer audience.

Contemporary Corporate Brand: Heritage as a minor component of brand essence

Heritage was a minor component of the contemporary brand's essence. Broken Bay Pearls deliberately developed its heritage quotient to enhance credibility and legitimacy. Broken Bay Pearls enriched its heritage through storytelling and traditions. The founders are key brand storytellers who tell their story to create 'an ongoing narrative' that will 'engage' stakeholders. They viewed brand's story as an emergent dialogue. Thus, they would 'constantly invite' stakeholders to construct a relevant brand narrative through their engagement with the brand. The construction of stories that originate in the stakeholders' brand experience authenticated the brand and enhanced the brand's contemporary identity:

Telling them about the consequences of the storms...I think people then sort of start to realise that...anything that involves nature is a

struggle...but if everyone feels as if they're part of the story, I think then your brand heritage begins to mean something.

The traditional techniques of the Japanese formed the basis of Broken Bay Pearl's practice of culturing quality pearls. Leaders acknowledge the significance of these traditions yet have in many ways discarded those that have hindered the brand's growth,

It's quite interesting, because, yes, the traditions are largely those that come from the Japanese industry, because there was no predecessor here. So, it's not like the wool industry, where you've got generation after generation of fine merino producers, and you can look back. We can only look to what the Japanese traditions were, and to be quite honest with you, a lot of that was wasted time, because a lot of it was not directly applicable. The Japanese are a funny race. They are so tradition-bound that, often, we would ask Hide, well, why is it done this way? I believe he honestly didn't know - that that's the way his father did it, and that's the way his grandfather did it, and that's the way his great-grandfather did it, and that's the way he does it...So, I would say the traditions of the past are - while it got us started - in many ways were a handicap.

The leadership team demonstrated an awareness of the opportunity to build an idealised heritage. However, for Broken Bay Pearls the 'importance of heritage' was 'from a marketing perspective'. Thus as 'survival is the first order of the day' heritage was an ancillary rather than primary focus of the brand.

5.2.4 Brand Essence Creation in the Hospitality Industry:

Comparison of The Huka Lodge and The Henry Jones Art Hotel

The chapter now analyses two corporate brand types in the hospitality industry. The comparison of the brand essence creation approaches of the corporate heritage brand the Huka Lodge and the contemporary corporate brand the Henry Jones Hotel strengthens the distinction between the management of each brand type.

Corporate Heritage Brand: Heritage as a major component of brand essence

Heritage was a major component of the Huka Lodge's brand essence. The leadership team recognised that heritage was of great significance to the brand's continuity. As the Marketing Director explains heritage is a 'pure foundation' that 'gives us our uniqueness. It gives us our point of difference' because 'no one has that heritage like we have'. Moreover,

I don't think we would be where we are if we didn't have that heritage...it's an ever-changing world and people want to appreciate the

history of the brand and want to be part of that. There are so many brands that don't have that anymore. There are too many brands that are here today and gone tomorrow and people want to be part of excellence and part of something quite unique. That does quite often come with time and experience...

The heritage of the Huka Lodge encompassed the brand's unique expertise, inherited knowledge and established wisdom. Leaders valued heritage as a defining element of the corporate heritage brand's essence and current identity:

No-one else can have that, and I think when you talk about the essence...what you're about, we always refer to that [heritage] in all our collateral; the iconic fishing lodge from the '30s - because we've proved that in the test of time, that we can still deliver...people want to be part of what's been very special and has that history.

Leaders leveraged the rich socio-historical associations to strengthen the cultural significance of the brand. The Lodge's '*mystical and magical*' surrounds that have Maori significance historically imbue the brand with a mythological quality.

The Huka Lodge takes '*advantage of celebrating*' its unique history through collateral, design and colour. The Marketing Director explains that '*we talk about where our history came from...we know where our heritage lies, so we still bring that to the forefront in everything we do*'. The quiddities of the Huka corporate heritage brand are its '*real luxury*' and '*authentic heritage...we live and breathe it*'. Leaders engage stakeholders with the brand's heritage through an authentic and salient heritage experience:

You can still experience that but doing it with a plethora of other experiences. Being able to share what people have done in the past because we do have some books upstairs on the history of Huka. You know we encourage people to unwind in our library and read that and understand the knowledge...We bring it alive really...

Heritage was central to the Huka Lodge's brand essence and current identity.

Corporate Heritage Brand: Personality as a minor component of brand essence

Personality was a minor component of the corporate heritage brand's essence. Leaders' deliberately developed the personality dimension of the brand's essence to appeal to current stakeholders. They described the brand's personality as '*intimate, sensual and*

elegant'. The brand's personality '*evolves in a way that is not – we're not trendy*' but '*sophisticated*' explaining that:

*...it's that fine line between traditional and being cutting edge. You know?
It's somewhere in the middle.*

Core strategies in developing this dimension included personification and the creation of user imagery through events and modern advertising. Selective events enhanced the brand's luxury status and prestigious positioning. In particular, leaders created a '*phenomenal calendar*' of events that they continued to evolve. Unique co-branded and co-creative luxury brand experiences presented guests an opportunity to construct a relevant brand experience and develop their own identity. Key collaborations with Louis Vuitton and Hartfield Jewellery enhanced the brand's status:

People love to be with people. It's a given that they've got the right - great location and great food and wine, but they want to - that's why I sort of brought this one out - this Art of Living. You've got a brand like Louis Vuitton there who's going to be showcasing and adapting a very personalised approach of how to pack. You've got Hartfield Jewellery who uniquely bring in - they've got the rights to bring in this beautiful French jewellery, and they're the only ones who can do that.

Leaders emphasise '*tailoring*' the brand experience to the clientele, '*making it a lot more interactive and engaging, so people can take away something special*'. They adjust the brand's message to develop a relevant brand personality. Leaders also emphasised the significance of language in developing a salient brand personality:

You can't have a luxury brand that is not talking luxury.

The corporate heritage brands selective use of digital strategies supported the perpetuation of corporate brand mythology, engaging stakeholders with the corporate brand through a modern and interactive interface. Leaders of the Huka Lodge acknowledge the importance of evolving the brand's offering and tailoring the brand's message to ensure that they maintained a relevant brand personality. However, in all instances the brand's personality was subject to the brand's heritage.

Contemporary Corporate Brand: Heritage as a minor component of brand essence

Heritage was a minor component of the contemporary brand's essence. The Henry Jones' Art Hotel deliberately developed its heritage quotient to enhance credibility and

legitimacy. The contemporary corporate brand purposefully enriched heritage through storytelling, symbolism and traditions. For example, leaders of the Henry Jones Art Hotel integrated the history of the IXL jam company and its founder Henry Jones through storytelling to construct an idealised brand narrative. Brand storytellers imbued artefacts with rich symbolic associations. Artefacts, especially the legendary building that formerly housed the jam factory, enhanced the brand's heritage and authenticity. Further, the introduction of a tradition of jam making, harking back to the IXL Company, created an idealised heritage. The leadership team demonstrated an awareness of the opportunity to build an idealised heritage. However, heritage was an ancillary rather than primary focus of the brand

5.2.5 Brand Essence Creation in the Fashion Industry: Comparison of Rodd & Gunn and Ubermen

Finally, the chapter compares the brand essence creation approaches of a corporate heritage brand and a contemporary corporate brand in the fashion industry. The findings from the corporate heritage brand Rodd & Gunn are followed by the contemporary corporate brand Ubermen.

Corporate Heritage Brand: Heritage as a major component of brand essence

Heritage was a major component of Rodd & Gunn's brand essence. The leadership team recognised that heritage was of great significance to the brand's continuity. They viewed heritage '*as an absolute strength*' explaining that the brand is of '*iconic status and there is a great sense of ownership in New Zealand*'. The brand's longevity is '*respected*' by the consumer and therefore '*really, really important*' to the Rodd & Gunn corporate heritage brand.

The heritage of the corporate heritage brand encompassed its unique expertise, inherited knowledge and established wisdom. Leaders valued heritage as a defining element of the corporate heritage brand's essence and current identity explaining that the heritage has '*got a resonance...the heritage is what the brand is about*' it is the '*DNA...Rodd & Gunn has got DNA. It has got richness and a history that is trustworthy and recognisable*'.

Heritage was an invaluable resource for the Rodd & Gunn corporate heritage brand. The brand's English pointer logo symbolises the brand's continuity. The General Manager explains that although,

...people will view that [heritage] as a weakness I view it as an absolute strength. So heritage is really, really important.

Heritage elements influence the development of and feature prominently in product designs as the following quote demonstrates:

...there's a heritage plaid that was created a long time ago. So we still use that in design. What the designers will often do is go through the archives and look at a heritage jacket or a cut and reinterpret it for today. So often every season in winter, there'll be a lot of looking through the archives, in terms of whether it be a fabric, whether it be a coat design, whether it be an aspect of – and we'll take one of those and reinvent them for today...

Heritage was significant to Rodd & Gunn's essence and current identity.

Corporate Heritage Brand: Personality as a minor component of brand essence

Personality was a minor component of the corporate heritage brand's essence. The corporate heritage brand deliberately developed the personality dimension of brand essence to appeal to current stakeholders. Core strategies in developing this dimension included personification and the creation of user imagery through events, strategic sponsorship and modern advertising. Rodd & Gunn personified an 'authentic, natural, rugged' active man:

...it is unashamedly male. So we don't ever shy away from the fact that we are a men's only brand and that we are for men. For real men. Not prissy, prim, metrosexual men, but for real men...so that realness and that manliness is a big part of it.

When we do research, we call the Ralph Lauren guy a look at me guy, whereas the Rodd Gunn person is a respect me, and we think that's a very important delineator with our brand. We are a respect me brand, not the look at me brand.

The brand's modern advertising is 'targeted and very focused' referencing the brand's heritage through New Zealand's 'emotive' landscape. The brand's personality evolved in response to shifting societal attitudes and values. Leaders have attuned the brand's imagery and advertising strategy to evoke consumer aspirations through a luxury sensibility.

We've just tweaked the brand to be a little more...everything's a little bit sharper, a little bit more impressive...we're still more real than they are [international brands], but we are a little bit more emotive.

We think the New Zealand landscape is very emotive and our look and feel, but we've tweaked our advertising to be a little bit more luxury. A little bit more exclusive, while still being very steeped - in the same locations, but our styling is just a little bit more finessed.

As well as developing the an element 'luxury' element, the young yet classic models featured personified the brand:

...there's an old saying that you - if you don't change, you die with your youngest customer. As they get older, you get older. So you start off as a - you could start off with a 20 year old brand and 30 years later, you're a 50 year old brand. So it's trying to keep...on growing. So you don't keep on getting older and older and older, but it's not going to the other extreme. So it's the very, very subtle changes that keep that relevancy, keep - so that the age never changes too much. We're not a young brand by any stretch of the imagination, but we could be - really easily become an 80 year old brand, if you didn't watch where you were...

Rodd & Gunn's digital strategy made the brand story accessible more widely, perpetuating the corporate brand mythology and engaging a new generation of stakeholders through the modern interfaces.

Contemporary Corporate Brand: Heritage as a minor component of brand essence

Heritage was a minor component of the contemporary brand's essence. The contemporary corporate brand deliberately developed its heritage quotient to enhance credibility and legitimacy. Ubermen purposefully enriched the heritage dimension through storytelling, symbolism and traditions. For instance, each Ubermen collection holistically and product individually is underpinned by a story that conveys meaning through design. Ubermen's leadership team demonstrated an awareness of the opportunity to build an idealised heritage, which inspired and motivated leadership teams. For instance, one leader emphasised the '200' to '300' year legacy of some fashion oriented 'luxury brands' and bringing the same experience to consumers yet in an affordable category. However, heritage was an ancillary rather than primary focus of the brand

5.3 BRAND ESSENCE FINDINGS BEST PRACTICE

In summary, for corporate heritage brands, heritage was extremely important. Heritage was the cornerstone of the essence of the corporate heritage brands, and foundational to their current identity. All leaders of the corporate heritage brands spoke with zeal about the innate and extant significance of brand heritage. The personality of the corporate heritage brands, in contrast, was more like an add-on marketing tool. Nonetheless, it performed a supportive role to heritage. In comparison, brand personality for contemporary corporate brands was of primary importance. For these brands, heritage was less critical, being deliberately developed to support the main component of the brands' essence. Accordingly, the above evidence and arguments lead to the first proposition:

Proposition 1

For corporate heritage brands, heritage is of greater significance than personality to the brand's essence; for contemporary corporate brands, personality is of greater significance than heritage to the brand's essence.

5.4 BRAND CONTINUITY

Brand continuity refers to the ability to maintain brand heritage over time (Balmer, 2011a; Urde *et al* 2007). Maintaining a sense of continuity over time is fundamental to the authenticity of corporate heritage brands (Balmer *et al* 2006; Blombäck and Brunninge, 2009; Hudson, 2011; Urde, 2003). The chapter now compares management action to maintain the brand continuity of corporate heritage brands and contemporary corporate brands. Potentially, continuity comprises both brand consistency and brand constancy. The chapter details the analyses of each corporate brand type in each industry beginning with the contemporary corporate brand and corporate heritage brand in the wine industry. Followed in sequential order of analysis by the jewellery, pearling, hospitality and fashion industries.

5.4.1 Brand Continuity in the Wine Industry:

Comparison of Tyrrell's and Sirromet

The chapter now contrasts the approach to continuity of the corporate heritage brand Tyrrell's with the contemporary corporate brand Sirromet.

Contemporary Corporate Brand

For Sirromet consistency was the primary strategy of brand continuity. The leadership team took a modern approach in managing consistency. The orientation of strategies was short-term. They centered on operationalising consistent communication of the brand's image through consistent delivery of the brand's message, story, vision and values. For the leadership team, consistencies of brand communication and brand value expression were keys to the congruence and strength of the brand's image. One leader stated that '*consistency*' was most '*important*' in protecting the contemporary corporate brand. He went further to explain,

What I mean by that is ensuring that the messages that we're taking to those people that we want to engage with are consistent in how they're delivered and in the look and feel of them.

When management identified an inconsistency between corporate brand communications and that brand's image they moved swiftly to amend the situation. The leadership teams actively heightened brand consistencies as part of a strategy to protect brand image. Their consistent delivery of brand communications, visual brand elements and a stakeholder brand experience that aligned with that brand's unique essence strengthened the corporate brand. Further the leaders recognised that consistency was a significant longer-term strategy in achieving historical relevance

Historical relevance is really, really important and you can only have it through consistency.

Thus revealing this relationship between consistency and historical relevance that contemporary corporate brands can develop continuity by strategically managing consistency over time.

Corporate Heritage Brand

For the corporate heritage brand, consistency was likewise important to brand continuity. The brand's '*reputation*' is '*built of quality and consistency*'. The leadership team protected the corporate heritage brand by maintaining consistency especially across the vital areas of quality, communication and legally protectable brand elements.

Notwithstanding, the corporate heritage brand went beyond brand consistency - it demonstrated constancy. The absolute approach to, and assiduous management of the

brand's identity strengthened the corporate heritage brand's continuity. Tyrrell's Leaders confidently managed the corporate heritage brands identity:

...it's about sticking to your guns and being confident in what you're doing.

They were staunch in remaining true to central brand values, refusing to comply with market trends that would compromise the brand. Tyrrell's unwavering sense of self was reflected in the constancy of its brand essence and supported by knowledge transferal between generations.

Tyrrell's leaders were faithful to and mandated constancy of the brand's values. The constancy of core brand values was particularly significant to the corporate heritage brand's longevity. The notion of brand constancy can be seen from Bruce Tyrrell's comments:

I think really redeveloping and building your brand is, is continually introducing it to the next generation. That doesn't necessarily mean that you change it.

It's about sticking to your guns and teaching people the good things about wine, it's not just about fashion. Fashions are great in trends but it's about what's timeless and what's always going to be around and just maintaining that quality image without jumping and changing as the market does. Which you can do a little bit of, but the core of the business has really got to stay as it is, as a premium, good value, family run.

I guess it's not wavering too much from that particular ideal and what your key brand values are...It's about preserving your brand - if you keep changing every five years you're not going to be relevant to anyone, because no one will remember it. You might be relevant for five minutes but it's a different type of relevance I guess, it's a longevity thing.

Consistency was of foremost significance to the continuity of contemporary corporate brand. However, Tyrrell's absolute approach to consistency equated with constancy and was underpinned by a strong sense of self and faithfulness to the brand's values.

5.4.2 Brand Continuity in the Jewellery Industry: Comparison of Percy Marks and LeGassick

The chapter now contrasts the approach to continuity of the corporate heritage brand Percy Marks with the contemporary corporate brand LeGassick.

Contemporary Corporate Brand

For LeGassick consistency was the primary strategy of brand continuity. The leadership team took a modern approach in managing consistency. Strategies were of a short-term orientation, centering on operationalising consistent communication of the brand's message, vision and values. For the leadership team, consistencies of brand communication and brand value expression were keys to the congruence and strength of the brand's image. Leaders acknowledged employees were the interface between the corporate brand and the consumer, with the power to enhance or undermine consistency. Thus, leaders clearly communicated expectations and brand values with employees, empowering the accurate delivery of the LeGassick brand:

I think that's really important that when they go into that frontline that that same message is getting out and that staff have an understanding of who we are.

When management identified an inconsistency between corporate brand communications and the brand's image they swiftly amended the situation. Leaders sought to improve brand consistencies as part of a strategy to protect brand image. Aligning brand communications, visual brand elements and stakeholder brand experiences with the LeGassick brand essence strengthened the corporate brand.

Corporate Heritage Brand

For Percy Marks, consistency was likewise important to brand continuity. The leadership team protected Percy Marks by maintaining consistency especially across the vital areas of quality, communication and legally protectable brand elements.

Notwithstanding, Percy Marks went beyond brand consistency and demonstrated constancy. The absolute approach to, and assiduous management of the brand's identity strengthened the corporate heritage brand's continuity. Leaders were staunch in remaining true to central brand values, refusing to comply with any market trends that would compromise the brand. For instance, managing constancy by walking away from compromising brand relationships and staunchly resisting pressure to change. Cameron Marks explains:

...you can't change your logo just because - I mean so many people have said to me, oh you've got to change the way you look, you've got to change this, you've got to change that. I say, no, we can't.

Percy Mark's mandate of constancy impelled employees to seek creative ways of addressing fundamental challenges in a retail context that strengthened the corporate heritage brand's identity. Percy Mark's unwavering sense of self was reflected in the constancy of the corporate brand's essence, and supported by the transferal of knowledge between generations.

Percy Mark's leadership team recognised the significance of the brand's historical values to the corporate brand's identity and longevity. Consequently, the constancy of the core values and their expression was a principal concern for leaders in protecting the perpetuation of the corporate brand's authentic essence explaining that '*the brand values don't change*'. The corporate heritage brand gave the illusion of change through marginal adjustments, while remaining unwavering to its cornerstone values. In '*not changing*' leaders protected the brand's values while developing the brand's marketing '*content*' so that it '*is relevant today*'.

Consistency was of foremost significance to the continuity of the corporate heritage brand. However, the corporate heritage brand was absolute in its approach to consistency. Their approach to consistency equated with constancy and was underpinned by a strong sense of self and faithfulness to the brand's values.

5.4.3 Brand Continuity in the Pearling Industry: Comparison of Paspaley and Broken Bay Pearls

The chapter now contrasts the approaches to continuity of the corporate heritage brand Paspaley with the contemporary corporate brand Broken Bay Pearls.

Contemporary Corporate Brand

Broken Bay Pearls primary strategy for achieving brand continuity was consistency. Strategies were of a short-term orientation. They centered on operationalising consistent communication of the brand's image, specifically through consistent delivery of the brand's message, story and values. For the leadership team, sustainable brand practices and the application of industry grading standards were key to the brand image and the survival of Broken Bay Pearls. For the leadership team, consistencies of brand communication and brand value expression were keys to the congruency of the brand's image and survival of Broken Bay Pearls.

We've got to maintain that quality, or we'll be lumped in with the freshwater pearls. The quality drops, and we can't win in that game, because they're produced in a market where the labour is much, much lower than our unit labour costs. So, we literally - to survive, we've got to produce something that is top-quality, and we just dump anything that isn't.

Leaders diligently monitored production processes. Monitoring oysters was central to the consistency of quality.

We want really good high lustre and really deep nacre quality that will later be reflected in the pearl. So, there's a few sacrificed along the way, to be sure that the interior shell quality is good.

The leadership team actively heightened brand consistencies as part of a strategy to protect brand image. Consistency in respect to product quality was their primary focus. The consistent delivery of brand communications and product quality, which aligned with that brand's unique essence, strengthened the corporate brand. The leadership team played an important role in managing brand consistency. However consistency practices relating to the corporate brand were only in their infancy.

Corporate Heritage Brand

For the corporate heritage brand, consistency was likewise important to brand continuity. *'Being consistent in the message. Telling the story'* supported the brand's image and authentic heritage. The leadership team protected the Paspaley brand by maintaining consistency especially across the vital areas of quality, communication and legally protectable brand elements.

Notwithstanding, the corporate heritage brand went beyond brand consistency - it demonstrated constancy. The absolute approach to, and assiduous management of Paspaley's identity strengthened the corporate heritage brand's continuity. Leaders meticulously aligned every facet of Paspaley's operations with the brand's authentic essence. Their uncompromising approach, underpinned by an innate faithfulness to Paspaley's historical essence, protected the integrity of the corporate brand:

So when you have a look at the ships, when you have a look at the planes, when you have a look at this office alright. The solid timber. When you have a look at the display cabinets on the shop floor which is made out of the burr of the tree. The most expensive wood. It has been that

unwavering commitment to absolute quality which is the only cornerstone in value that set them apart probably from anyone else. At an absolute disregard to expense. So the best no matter what. I think with that came the image and view that indeed Paspaley through that absolute commitment to quality was viewed as the best of the best and hugely expensive.

Accordingly, the brand's vision inspires leader's to make decisions that enhance corporate brand continuity and advance brand heritage, specifically those coalescing around sustainable pearling practice. The leadership team's decisions are underpinned by Paspaley's clarity of self and moderated by a higher vision rather than a short-sighted focus on 'tomorrow's results'.

Leaders were faithful to and mandated the constancy of Paspaley's values. The constancy of core brand values was particularly significant to the corporate heritage brands' longevity. The steadfast '*commitment and absolute passion for sticking*' to Paspaley's '*values*' supported corporate brand continuity. The corporate heritage brand gave the illusion of change through marginal adjustments and peripheral modifications while remaining unwavering to its cornerstone values. The introduction of pieces incorporating pearl shell was consistent with the Paspaley's product offering and grounded in the brand's provenance yet softened the expression of absolute quality to the consumer, subtly conveying attainability,

...it is an exercise that started in earnest late last year and has continued into this year. So we are for the first time taking a little bit of a corporate approach to making sure that the pillars that underpin the overall brand proposition all line up. So that is a journey that will continue to evolve. But having created a sound foundation the evolution will be always in tinkering around at the margin. What I mean by that is predominantly most of the jewellery we sell incorporates pearls. I've now made the decision that going forward to have some more entry price merchandise available will have some jewellery with Mother of Pearl. Now Mother of Pearl is still true to the proposition. Do you know what I mean? It's the same product. It's just not a pearl. So it's really making those sorts of decisions.

Interestingly, the corporate brand's heritage has its origins in pearling for shell, thus its introduction into the product range has historical repercussions. By way of illustration the case demonstrates how corporate heritage brands can manage the paradox of constancy and change.

5.4.4 Brand Continuity in the Hospitality Industry:

Comparison of the Huka Lodge and the Henry Jones Art Hotel

The chapter now contrasts the approaches to continuity of the corporate heritage brand the Huka Lodge with the contemporary corporate brand the Henry Jones Art Hotel.

Contemporary Corporate Brand

For the Henry Jones Art Hotel consistency was the primary strategy of brand continuity. The leadership team took a modern approach in managing consistency. Strategies were of a short-term orientation, centering on operationalising consistent communication of the brand's image through consistent delivery of the brand's message, story, vision and values. For the leadership team, consistencies of brand communication and brand value expression were keys to the congruence and strength of the brand's image. For example, the art curator functioned as a 'style vulture' managing the hotel's art collection to ensure that pieces embodied and conveyed the brand's contemporary essence. The brand's art collection was consistent with the brand's essence:

We own the concept. The brackets, if you like, around our art collection is that they must be contemporary, as in they are working artists now. So it's not a historic collection, it's the Tasmanian working artist right now. By that meaning is to say that they are modern because they are actually still working in this day.

The management team were punctilious in the application of the brand's colour, ensuring that the red across all brand communications was consistent:

As far as our logos go there's one red, and it will never be another red.

When management identified an inconsistency between corporate brand communications and that brand's image they moved swiftly to amend the situation.

Probably my executive managers and that marketing group are the team responsible for the brand. We call each other the style council or the design police. Immediately upon somebody touching our brand so, people will be involved and mistakenly do something that sits on our website, for instance, we are so over all of our bits and pieces that somebody in that group will pick it up and get on the phone to whoever's meddling and go, let's pull that immediately and start again.

The leadership team improved brand consistencies as part of a strategy to protect brand image. Leaders took the brand's unique service offering seriously making decisions that enhanced the brand's essence. Managers eschewed the advantages of standardising

hotel procurement, seeking products with rich provenance that enhanced the brand's identity,

There was a moment where I would have to protect or fight the corporation somewhat to say that our wine list would be individual, rather than fitting into a bracketed set of wines...I have a maître-d' or a sommelier who needs to be creative and wants the juices flowing, and to have their energy to say, okay you can only choose wines that's from a hundred and fifty wines, immediately de-motivates that individual person.

...we want the absolutely finest product...you might take bacon for instance, should be a fairly stocked product across any hotel. Bacon is the same at every breakfast somewhat. We would like to get our bacon, and we do get our bacon from a very new abattoir which is down to the south in the Huon Valley.

I was to protect to brand of the hotel. The brand and the feeling and the essence of the hotel. What the company find now is that I can be often fighting the corporatisation. So fighting some procedures or some - the more general procedures of procurement. So we may have this one wine or one coffee right throughout the group. Well if that doesn't fit the brand of this hotel, I'm going to fight that decision...a lot of the protection from my point of view has come down to procurement from the group.

Their consistent delivery of brand communications, visual brand elements and a stakeholder brand experience that aligned with the brand's unique essence strengthened the corporate brand.

Corporate Heritage Brand

For the Huka Lodge 'consistency' was 'key' to brand continuity,

We constantly look at what we're doing, ensuring that if we're going to send an invitation out, or if we're going to work with a magazine, look at editorial opportunities...the message has got to be very consistent.

The leadership team protected the corporate heritage brand by maintaining consistency especially across the vital areas of quality, communication and legally protectable brand elements.

Notwithstanding, the Huka Lodge went beyond brand consistency – demonstrating constancy. The absolute approach to, and assiduous management of the brand's identity strengthened the corporate heritage brand's continuity. Huka Lodge believe they have set 'the benchmark globally' and their leaders are therefore 'very mindful of how' they

'protect it'. How they approach the corporate brand's identity is 'constant' to ensure that they deliver a 'phenomenal' luxury experience that is commensurate with the Lodge's heritage. Leaders confidently managed their brand's identity. They were staunch in remaining true to central brand values, refusing to comply with any market trends that would compromise the brand:

We don't do different advertisements. We don't play with our rates. We don't put a bad advertisement out there. We're very consistent in everything we do, and that's not boring. It's being true to what you're about.

Leaders were faithful to and mandated the constancy of the brand's values. The constancy of core brand values was significant to the Huka Lodge's longevity. The corporate heritage brand gave the illusion of change through marginal adjustments and peripheral modifications, while remaining unwavering to its cornerstone values. The Huka Lodge demonstrates how corporate heritage brands can manage the apparent paradox of both constancy and change. The notion of brand constancy can be seen from the following comments:

We are about luxury, but the word luxury has been so randomly used these days, that it's confusing about what she's about, but at the end of the day you've also got to reconcile with the fact that you are targeting this pure affluent market, and how do you get to them, but then you've also got to attract the aspirational crowd, and you've also got to get to the young generation for the future. So it's a continual balancing act about how you're going to deliver what you're about in a way that gets buy-in for all those market segments.

It's that fine line of how you've evolved; visually we have more of a presence if we use the images we have, on a big scale, as opposed to using a TV, which to me doesn't send the same message. We're not to do - it's that fine line between traditional and being cutting edge. You know? It's somewhere in the middle.

Consistency was of foremost significance to the continuity of the corporate heritage brand. However the corporate heritage brand was absolute in its approach to consistency. The Huka Lodge's approach to consistency equated with constancy and was underpinned by a strong sense of self and faithfulness to the brand's values.

5.4.5 Brand Continuity in the Fashion Industry: Comparison of Rodd & Gunn and Ubermen

The chapter now contrasts the approach to continuity of the corporate heritage brand Rodd & Gunn with the contemporary corporate brand Ubermen.

Contemporary Corporate Brand

For Ubermen consistency was the primary strategy of brand continuity. The leadership team takes a modern approach in managing consistency. Strategies were of a short-term orientation, centering on operationalising consistent communication of the brand's image through consistent delivery of the brand's message, story, vision and values. For the leadership team, consistencies of brand communication and brand value expression were keys to the congruence and strength of the brand's image. In building brand relevance among targeted consumers, leaders only accepted '*opportunities*' that enhanced desirable brand associations.

When management identified an inconsistency between corporate brand communications and the brand's image they moved swiftly to amend the situation. The leadership team actively heightened brand consistencies as part of a strategy to protect brand image. Their consistent delivery of brand communications, visual brand elements and a stakeholder brand experience that aligned with the brand's unique essence strengthened the corporate brand. Aligning stakeholders' values with those of the brand was particularly important.

Corporate Heritage Brand

For Rodd & Gunn, consistency was likewise important to brand continuity. The following quote shows that consistency is a basis for maintaining continuity:

If you're consistent over a long period of time, you create DNA.

Leaders use past brand experiences to enhance organisational brand alignment, as consistency is central to the brand's ongoing success, especially in competitive markets,

So you have to be really true and consistent about who you are as a brand.

The leadership team protected the corporate heritage brand by maintaining consistency principally across the vital areas of quality, communication and legally protectable

brand elements. Leaders emphasised the significance of consistency in brand marketing communications to the perpetuation of the brand's authentic essence:

Rodd & Gunn advertising over a 10-year period, or even over a longer period, you'd see a great consistency in what's done. If you look at the product's performance, again it's been consistent, in terms of its quality [it] is consistent.

Notwithstanding, Rodd & Gunn went beyond brand consistency – it demonstrated constancy. The absolute approach to, and assiduous management of the brand's identity strengthened the corporate heritage brand's continuity. Leaders go beyond maintaining consistency across brand elements. How they approach the corporate brand's identity is 'constant' to ensure that the brand's essence is not compromised but strengthened. Leaders have a higher mandate of operations.

It's that whole mantra on quality which, from a customer perspective, that's what makes or breaks you in their perception. So we have a two-year guarantee that no one else in the world has... we're really stringent about it. It's making sure that we live that dream and respond, if we have a problem, in the way that's in the best interest of the customers. Rather than sometimes the best interest of the business may be to close your eyes to it, but we have this obligation from a quality point of view to make sure that we live that dream.

Leaders refused to incorporate inferior materials into products that would compromise the brand's core values of quality and integrity:

Well something that's synthetic, and there's a lot of performance products out there at the moment that have got a high degree of synthetic characteristics. We'll never do that, because of it's not natural or real or authentic or all those sort of things. So we stick to that mantra. We may have a garment that's got a bit of acrylic in it, and we'll go why is that acrylic in there? Oh it's there to make sure that that combo - the wool or alpaca binds properly. So it's there for a reason, not for a - not because it's fashion. It's there for function. So that sort of governing things.

Leaders were faithful to and mandated the constancy of the brand's values. The constancy of core brand values was particularly significant to the corporate heritage brand's longevity. They were also staunch in remaining true to central brand values, refusing to comply with any market trends that would compromise the brand, a true sign of constancy, management maintain the brand's standards in the 2007 global financial crisis, while other brands pursued strategies that would alleviate the contextual pressure on the brand's balance sheet, management determined to:

do nothing...I'm not going to cut the store hours back...We will change nothing. We will keep our store hours up. We'll keep our levels of service up and we're going to keep our quality up...if we hold true and if we hold steady, and if we maintain our quality and our service, we'll come out of the financial crisis in a better position.

Rodd & Gunn gave the illusion of change through marginal adjustments and peripheral modifications, while remaining unwavering to its cornerstone values.

So you have to keep on evolving rather – and in men's, it's never a revolution. It's always an evolution. So it's that it's more constant – it's like a glacier. It's always moving, but you don't actually know it's moving...

Consistency was of foremost significance to the continuity of the corporate heritage brand. However, the corporate heritage brand was absolute in addressing consistency. Rodd & Gunn's approach to consistency equated with constancy and was underpinned by a strong sense of self and faithfulness to the brand's values.

5.5 BRAND CONTINUITY FINDINGS SUMMARY BEST PRACTICE

Consistency was of foremost significance to the continuity of contemporary corporate brands and corporate heritage brands. However, the corporate heritage brands were absolute in how they approached consistency. Their approach to consistency equated with constancy and was underpinned by a strong sense of self and faithfulness to the brand's values. Thus, the evidence and arguments lead to this study's second proposition:

Proposition 2

Contemporary corporate brands approach brand continuity primarily through consistency; corporate heritage brands have consistency and go further to insist on constancy (clarity of identity and protection of inheritance).

5.5 BRAND PROTECTION: BRAND STANDARDS AND BRAND ARCHITECTURE

Brand protection refers to the ability to protect heritage over time (Balmer, 2011a; Urde *et al* 2007). The management of corporate heritage brands requires diligent protection of corporate heritage through ongoing brand stewardship (Balmer, 2011a, 2011b; Urde *et al* 2007; Wiedmann *et al* 2011a). The chapter now compares the approach of corporate

heritage brands and contemporary corporate brands to brand protection. The findings divide brand protection into the two components of brand architecture and brand standards.

5.5.1 Brand Protection in the Wine Industry: Comparison of Tyrrell's and Sirromet

The chapter now contrasts the approach to brand protection of the corporate heritage brand Tyrrell's with the contemporary corporate brand Sirromet.

Contemporary Corporate Brand

Sirromet emphasised the importance of developing brand architecture and took an active approach to reinforcing the brand. Following a major brand audit, Sirromet's leadership team re-engineered the corporate brand's distribution framework and product brand architecture to enhance structural control and promote organisational congruity. The leadership team invested '*below the line*' to support the consistent expression of the corporate brand's value message and facilitate reinforcement strategies. Leaders reinforced the corporate brand's values, message and vision primarily through consistent communication and demonstration of core branding principles. The contemporary brand's architecture supported the leaders' efforts to improve brand consistency and facilitated reinforcement strategies.

Corporate Heritage Brand

Tyrrell's flat, '*family structure*' supported swift, innovative decision-making processes that protected the corporate heritage brand's pioneering legacy. However Tyrrell's brand architecture was established rather than emergent. Standards were an integral means of protecting the brand's historical essence, supporting brand constancy and continuity. According, to Christopher Tyrrell '*maintaining the utmost standards*' is a central concern '*because if you don't then we probably wouldn't be here*'. Standards governed the two central corporate brand elements of integrity and quality.

Tyrrell's standards of integrity were integral to the corporate brand's longevity, supporting the brand's constancy and continuity. Standards governing integrity were primarily tacit embodied by core employees, supported by the brand's culture and underpinned by the conviction of leaders. Implicit standards of integrity encompassed

the brand's conduct and values. The leadership team conformed brand practice to the corporate brand's behavioural codes. Tyrrell's behavioural codes informed the leadership team's approach to sponsorship and internal stakeholders. The leadership team maintained 'strict' control over whom the corporate brand associated with through sports and social sponsorships.

The leadership team explained that the behaviour of Tyrrell's towards employees has a strong moral component. Tyrrell's leaders went beyond their call of duty. They embodied the brand's core value of family, actively caring for the health and wellbeing of employees. Tyrrell's approach distinguishes the brand from its corporate counterparts. As Bruce Tyrrell eloquently explains:

...they're the sort of things – that's again the difference again with a family company. That if you're working for the Commonwealth Bank well there's a set of rules and that's it. Whereas if you're here – you don't necessarily play by the rulebook.

The leadership team ensures that Tyrrell's does not engage in practices, which would compromise the integrity of the corporate brand's historical essence. Tyrrell's leaders remained faithful to the corporate brand essence. Bruce Tyrrell considers Tyrrell's unwavering approach key to the corporate brand's ongoing strength, recalling that,

...when Hunter Red's became unfashionable and Barossa's became fashionable...we never tried to make them. We stuck to what we knew was right for this area. And that hurt us for a while but now it's coming back as a great advantage.

Standards governing the integrity of the corporate brand's value of family, however, were slightly more explicit in nature. Chris Tyrrell reveals the family devotion that underpins their constant approach explaining,

...if we went out and said to all our members do you want a share in the company type scenario, the family is not making money, then there goes your corporate image doesn't it, corporate brand. But it's about sticking to your guns and being confident in what you're doing.

For Tyrrell's it's about 'not wavering' from what the 'key brand values are'.

Tyrrell's standards of quality supported the constancy and continuity of the corporate brand. Tyrrell's standards governing quality, like those of integrity, ensue from the

corporate brand's historical essence. The leadership team conformed brand practice to the corporate brand's, primarily tacit, standards of quality. Their approach was highly rigorous, enacted through quality control. Bruce Tyrell explains,

I've got probably one of my most valuable employees as my quality control manager. And there's a set of rules here that says if something's not right to go down the bottling in line and I say yes it's going to be bottled. Scott says no – the people on the bottling won't bottle – no matter what I say. He has total control over them, which is how it should be...

For Tyrrell's, standards governing integrity and quality were integral to the longevity of the corporate brand.

5.5.2 Brand Protection in the Jewellery Industry: Comparison of Percy Marks and LeGassick

The chapter now contrasts the approach to brand protection of the corporate heritage brand Percy Marks with the contemporary corporate brand LeGassick.

Contemporary Corporate Brand

The contemporary corporate brand emphasised the importance of developing brand architecture and took an active approach to reinforcing the brand. Leaders reinforced the corporate brand's values, message and vision namely through consistent communication and demonstration of core branding principles. LeGassick encouraged employees to support the brand's image, promoting their accurate representation of the corporate brand through training and meetings. The contemporary brand's architecture supported the leaders' efforts to improve brand consistency and facilitated reinforcement strategies.

Corporate Heritage Brand

The corporate heritage brand also demonstrated that brand architecture was an important aspect of brand protection. Brand architecture was significant to the perpetuation of Percy Mark's unique culture. The corporate heritage brand emphasised the maintenance and refinement of brand architecture. The involvement of the Mark's family ensured the perpetuation of the brand's defining values and culture. However, the addition of leaders with modern managerial values challenged traditional assumptions and supported brand change.

The corporate heritage brand went further than strengthening brand architecture, managing brand protection in terms of standards. Standards of integrity were integral to Percy Mark's longevity, supporting the brand's constancy and continuity. Standards of integrity were primarily tacit. The brand's implicit standards of integrity encompassed brand conduct and values. The leadership team conformed corporate brand practice to the corporate brand's behavioural codes. Percy Mark's behavioural codes informed the leadership team's approach to service, transparent and honest dealings with stakeholders and firm decision to seek alternative avenues to solve typical retail problems. However, standards that governed the integrity of the corporate brand's value of family were more explicit. The leadership team adhered to criteria governing family involvement that stipulated expertise thresholds and direct succession. The leadership team complied with these standards to prevent the negative expression of the brand's core value of family.

Percy Mark's standards of quality supported the constancy and continuity of the corporate brand. The leadership team conform brand practice to the corporate brand's standards of quality, sourcing the '*finest*' precious stones and persisting in the superior, handcrafted methods of production. For Percy Marks standards governing integrity and quality were integral to the longevity of the corporate brand.

5.5.3 Brand Protection in the Pearling Industry: Comparison of Paspaley and Broken Bay Pearls

The chapter now contrasts the approach to brand protection of the corporate heritage brand Paspaley with the contemporary corporate brand Broken Bay Pearls.

Contemporary Corporate Brand

The contemporary corporate brand emphasised the importance of developing brand architecture and took an active approach to reinforcing the brand. Broken Bay Pearl's leadership team focused on developing the brand's architecture through strategic partnerships. Leaders were negotiating with a purchasing group which if successful would provide the '*money to expand*' the reach of '*marketing*' efforts to achieve '*greater*' brand awareness. The corporate brand's price architecture also supported and protected the corporate brand's niche positioning.

Further, the leadership team takes an active approach to brand protection, reinforcing the corporate brand's values and message. The leadership team consistently communicated the corporate brand's values, 'emphasising' in their brand promotions that it is 'unique' and that it is 'local'. Conveying key brand elements to reinforce a desired personality and greater identity,

They want to push that it is Broken Bay Pearls, that it is unique, that it is local...I think it's important to stress the fact that here's a local bunch employing local people doing something worthwhile, something that's - I mean, we're all on about these days about renewable resources and the production of pearls and production of oysters generally is something that only relies on the tide coming in and out. It's infinitely repeatable without chewing up resources.

The leadership team foresees that a strategic partnership with Leading Edge will play a central role in reinforcing the corporate brand's unique value proposition.

Corporate Heritage Brand

The corporate heritage brand also demonstrated that brand architecture was an important aspect of brand protection. Brand architecture supported Paspaley's unique culture. The corporate heritage brand emphasised the maintenance and refinement of brand architecture. To protect Paspaley's brand leadership, brand management carefully reviewed and revised the brand's architecture to enhance the brand's service culture and ensure that the consumer was the foremost consideration in strategic decisions. Paspaley's leaders have revised the organisational structure to ensure that the consumer is central to all decision-making processes:

There hasn't been a lot of freedom but I'm improving that by saying that...I'm only interested in what the customer wants and they get that. So they actually get my inverted pyramid. So I think they found it quite amazing that when I came on board they said - at one stage one of the - well the CEO actually put to me, hey Richard I really like this, that and the other. I said well James quite frankly I don't really give a shit what you like. It's not about you. It's about the customer. He looked at me shocked. He said, my God no-one's ever said that to me before. But you know what it makes a lot of sense.

Consequently, leaders also refined the brand's price architecture balancing exclusivity and attainability, encouraging aspirational purchases through products that enable the consumer to buy into that brand's story,

So we are actually on this transition. As I have just reviewed our price architecture you just can't get it wrong when you work back from the customer. We are here to serve the customer...I'm really trying to get people to understand is that if you're not serving the customer you better be serving someone that is. So trying to create that whole service culture through leadership by making myself accessible to everyone in the organisation.

To protect Paspaley's brand leadership, brand management carefully reviewed and revised the brand's architecture to enhance the brand's service culture and ensure that the consumer was the foremost consideration in strategic decisions.

The corporate heritage brand went further than strengthening brand architecture. Paspaley approached brand protection in terms of standards. The corporate heritage brand's standards supported historical continuity. Although some standards were primarily tacit, encompassing the brand's conduct and values, others, especially those related to quality, were absolute. As an example, Paspaley's pioneering standards have set a precedent for the rest of the pearl industry. The inflexible nature of these standards is an important protective mechanism,

We are now creating a level playing field by having worked with the GIA [Gemmological Institute of America] and trying to get them to lift their standards which has created a vehicle that now really with much fanfare will be launched around the world.

The leadership team meticulously ensured that every element of Paspaley's fully integrated operations adhered to the principle of absolute quality. Paspaley applied rigorous methods in the grading of pearls. The process was governed by 'exacting' standards to distinguish between the various echelons of quality and inform the construction of priceless strands. The leadership team, to ensure that each aspect is 'adhered to in absolute detail', focus on clear communication and on ensuring employees understand how to deliver the Paspaley standard.

5.5.4 Brand Protection in the Hospitality Industry:

Comparison of the Huka Lodge and the Henry Jones Art Hotel

The chapter now contrasts the approach to brand protection of the corporate heritage brand the Huka Lodge with the contemporary corporate brand the Henry Jones Art Hotel.

Contemporary Corporate Brand

The contemporary corporate brand emphasised the importance of developing brand architecture and took an active approach to reinforcing the brand. Leaders' purposeful decisions relating to procurement strengthened the corporate brand's architecture. These purposeful decisions protected the individuality and quality essence of the corporate brand. Leaders extended the brand's architecture online through a booking platform but '*stopped short*' of a '*shopping cart*' scenario to maintain consistency between stakeholder experience and the brand's image, thus protecting the brand. Leaders also '*sustain*' the '*architecture of the building*' through continued investments in the hotels refurbishment to protect the brand's essence.

The leadership team took an active approach to brand protection, reinforcing the corporate brand's values, message and vision. They iteratively communicated the brand's core purpose, envisioned future and story. Meetings with the press provided an opportune setting for leaders to engage stakeholders with the brand's story. Leaders empowered employees to support the corporate brand's image, encouraging sincere storytelling and accurate representation of the brand's essence. They also encourage consumers to enforce core brand dimensions such as quality through a strategically engineered brand protection mechanism. Events like Savour Tasmania, cornerstone collaborations (Tourism Australia), strategic partnerships (Mona Art Gallery) and '*art history tours*' tours also reinforced core elements of the brand's paradoxical essence. Henry Jones strategy of reinforcement is supported by the brand's architecture.

Corporate Heritage Brand

The corporate heritage brand also demonstrated that brand architecture was an important aspect of brand protection. Brand architecture was significant to the perpetuation of the Huka Lodge's unique culture. The corporate heritage brand emphasised the maintenance and refinement of brand architecture. To protect the Huka Lodge's brand leadership, the composition of the service and managerial team was integral:

The service is absolutely key. You get the right team with the passion and the attitude, and they believe they can do anything, but you also need to have someone who's leading them and motivating them So he's got that right with the team, and it's always a mix of international students as well as local people, and from Taupo, but it's very hard because we push the

boundaries with what we do, and the mentality of some of the kiwis is very relaxed, and some of that may not wash with - you know, when you look at the USA market that wants a service like this. So he developed a very unique experience with the team, in how he trained them and how he developed them.

Brand management also made ongoing investments in maintaining the Lodge's luxury amenities to ensure that stakeholders experienced the brand's authentic essence.

The corporate heritage brand went further than strengthening brand architecture, approaching brand protection in terms of standards. The Huka Lodge's standards supported historical continuity. Although some standards were primarily tacit, encompassing the brand's conduct and values, others, especially those related to quality, were absolute. Leaders are *'very mindful of how'* they *'protect'* the corporate heritage brand, adhering to standards that while tacit are exact governing brand relationships, communication and stakeholder brand experience. Leaders were very selective in the choice of communication avenues and *'discrete'* in the delivery of branded content, as the following quote evinces:

So you're just having to manage how you communicate effectively in the right way that just doesn't diminish what we're about. It's still luxury. So you're not going to Louis Vuitton not produce those beautiful brochures, even though their online social media concept is very, very important to them -they're still going to the market in that way, too - a selection of that market.

*We are about luxury, but the word luxury has been so randomly used these days, that it's confusing about what she's about, but at the end of the day you've also got to reconcile with the fact that you are targeting this pure affluent market, and how do you get to them, but then you've also got to attract the aspirational crowd, and you've also got to get to the young generation for the future. **So it's a continual balancing act about how you're going to deliver what you're about in a way that gets buy-in for all those market segments'***

The leadership team was meticulous in ensuring that every element of the Huka Lodge's experience embodied the brand's unique essence and adhered to the principle of authentic luxury. Employing individuals with the *'right attitude'*, world class training and continuing communication between the leadership team aligned employee values with the corporate heritage brand, supporting the delivery of a stakeholder-brand experience that accorded with the Huka Lodge's governing standards.

5.5.5 Brand Protection in the Fashion Industry: Comparison of Rodd & Gunn and Ubermen

The chapter now contrasts the approach to brand protection of the corporate heritage brand Rodd & Gunn with the contemporary corporate brand Ubermen.

Contemporary Corporate Brand

The contemporary corporate brand emphasised the importance of developing brand architecture and took an active approach to reinforcing the brand. For example ‘*constantly reminding*’ stakeholders of the centrality of the consumer’s brand experience to the company’s success. Leaders reinforced Ubermen’s brand values, message and vision namely through consistent communication and demonstration of core branding principles. The Managing Director engaged stakeholders with the brand’s vision and empowered them to support the realisation of this vision through shared responsibility and an open organisational structure. Ubermen’s brand architecture supported the leaders’ efforts to improve brand consistency and facilitated reinforcement strategies.

Corporate Heritage Brand

The corporate heritage brand also demonstrated that brand architecture was an important aspect of brand protection. Brand architecture supported the corporate heritage brand’s unique culture. The corporate heritage brand maintained and refined brand architecture. Leaders actively strengthened the brand’s architecture operationalising organisational efficiency through an innovative stock management system and the introduction of multiple retailing channels that improved ‘*organisational efficiencies*’ and stakeholder brand experience.

So having live stock at retail, so you can look at the stock and people can say I've picked - it's not available here, but we can get it for you here. Would you like to collect it from another store? Would you like to buy it now and we can deliver it to you, so being able to offer multi-channels. Not just product that is on hand in that particular retail store, but what products - accessing and making all your products available to all your stores and all the time. To your customers, wherever they may be is critical.

Management revised the brand’s retail marketing mix and strengthened the brand’s retail presence through the refurbishment and establishment of branded retail lodges.

Rodd & Gunn went further than strengthening brand architecture – it also approached brand protection in terms of standards. The standards of the corporate heritage brand supported historical continuity. Standards governing quality protected Rodd & Gunn’s authentic essence and strengthened the brand’s longevity:

*It's because we are today everything that we've done in the past that was critical to us. So in New Zealand, the brand has this **iconic status** and there's a **great sense of ownership** in New Zealand of the brand... there's a real pride of place in New Zealand. That's very much part of what Rodd & Gunn is. **So not letting our standards down on everything that has come to pass, but what the brand is about.***

Although some standards were primarily tacit, encompassing the brand’s conduct and values, others, especially those related to quality, were absolute. The following quote offers an example:

*Not changing the quality, maintaining the qualities, maintaining the standards, being unrelenting on standards at retail and **being unrelenting on...values...maintaining the standards of your store building and store design.** If you move away from those settings and dilute the brand and keep it going, then you foregoing what it is, something that's very important'*

The leadership team was meticulous in ensuring that every element of Rodd & Gunn’s product and service experience adhered to the brand principle of quality.

Quality is one of the hugest things in our business, and it's the thing that we do I think more than anyone else in the country. We've got a lot of suppliers that all say to us, our quality standards are higher than anyone else they deal with.

Standards governed the selection of raw materials, manufacturing, brand imagery, brand communications and the retail marketing mix. These standards protected the brands New Zealand heritage. Brand imagery emphasised outdoor pursuits and the brand’s provenance:

*So it's always shot in a way that encapsulates great beauty and natural characteristics. Everything about the brand is natural, so the essence of the brand is natural. We don't use any synthetic fibres at all, so everything is either wool or linen or leather, all that sort of stuff. So natural fibres and naturalness is a really big part of our business. If you go to our stores, we don't have anything plastic in the store. It's stone, wood, leather, timber - all those sort of things. So it's that **natural essence** that we try to get across, and we view that whole natural environment.*

The leadership team also focused on clear communication and on ensuring employees understood how to deliver the Rodd & Gunn standard, explaining the importance that employees ‘*understand who you are and what you are*’.

5.6 BRAND PROTECTION FINDINGS SUMMARY BEST PRACTICE

The contemporary corporate brands emphasised the importance of developing brand architecture and took an active approach to reinforcing the brand. Leaders reinforced the corporate brands’ values, message and vision namely through consistent communication and demonstration of core branding principles. The brand architecture of the contemporary corporate brands supported the leaders’ efforts to improve brand consistency and facilitated reinforcement strategies.

The corporate heritage brands also demonstrated that brand architecture was an important aspect of brand protection. Brand architecture was significant to the perpetuation of each corporate heritage brands’ unique culture. The corporate heritage brands emphasised the maintenance and refinement of brand architecture. However the corporate heritage brands went further than strengthening brand architecture - they also approached brand protection in terms of standards. The standards of each corporate heritage brand supported historical continuity. Although some standards were primarily tacit, encompassing the brand’s conduct and values, others, especially those related to quality, were absolute. The inflexible nature of these standards is an important protective mechanism. Thus, the evidence and arguments lead to a third proposition:

Proposition 3

Corporate heritage brands approach brand protection in terms of standards, while contemporary brands emphasise design architecture and take a more active approach through reinforcing.

5.7 BRAND RENEWAL

Brand renewal refers to the ability of corporate brands to renew themselves (Balmer, 2011b; Hudson, 2011). Corporate heritage brands should be responsive to change to maintain relevance to stakeholders (Aaker, 2004; Balmer, 2006, 2011a, 2011b; Balmer *et al* 2006; Hudson, 2011; Morley and McMahon, 2011; Wiedmann *et al* 2011a). The chapter now compares brand renewal practices between corporate heritage brands and contemporary brands. The findings confirm the significance of brand renewal practices

to both the management of corporate heritage brands and contemporary corporate brands. However, the scope of renewal of the corporate heritage brands was at variance with that of the contemporary brands.

5.8.1 Brand Renewal in the Wine Industry: Comparison of Tyrrell's and Sirromet

The chapter now contrasts the brand renewal practices of the corporate heritage brand Tyrrell's with the contemporary corporate brand Sirromet.

Corporate Heritage Brand

Tyrrell's emphasised the importance of ongoing improvements to longevity. The knowledge the corporate heritage brand generated through prior experiences informed brand renewal strategies. Renewal restrictions were due in part to the paradoxical essence of the corporate heritage brand, which necessitates leaders manage constancy and change to maintain authenticity. Accordingly, rather than radical change, Tyrrell's emphasised evolutionary change on two key levels; ongoing improvements to the core brand's core and purposeful peripheral adjustments. The Tyrrell's leadership team continually improved the fundamental aspects of the corporate heritage brand. Christopher Tyrrell explains:

It's about how you're going to...keep moving, keep making the place better...it's all those things [from vineyard management to the cars employees drive that] you need to think about that ensures that you're still going to be here in the next five generations time.

Sustainable brand practice, for Tyrrell's was consequently a central focus. Tyrrell's leaders endeavoured to strengthen the corporate brand's foundations whether through,

...slightly improving vineyard management or slightly improving the winery. The style doesn't necessarily change but it's just how you're going to tweak it to make it one or two per cent better each year. Just because you've been using a certain bit of machinery for 10 years it doesn't mean you can't improve on it.

The leadership team took an evolutionary rather than radical approach, acting to strengthen and refine the corporate heritage brand. Leaders achieved brand salience all the while protecting Tyrrell's authentic essence through purposeful peripheral brand adjustments. Leaders refused to comply with industry trends that would compromise the

brand's authentic essence. Instead they favoured strategic change that supported the corporate heritage brand's longevity, as the following quote illustrates:

You can't just do it because it's hot now. It's about preserving your brand and about – if you keep changing every five years you're not going to be relevant to anyone, because no one will remember it. You might be relevant for five minutes but it's a different type of relevance...it's a longevity thing.

Consequently, Tyrrell's made 'changes steadily'. Change for Tyrrell's was moderated by its brand essence, of which heritage was of primary significance. Consequently, the corporate heritage brand's constraints were greater in scope than the contemporary brand.

Contemporary Corporate Brand

Sirromet had few if any limitations in renewing the corporate brand. Renewal was unaccompanied by the propensity, shown by Tyrrell's, to engage in multiple iterations of internal checking against historical knowledge to protect the constancy of the corporate brand's historical essence. Sirromet's leadership team embraced the vision of the brand's founder and endeavoured to break down barriers to its realisation:

...we're all part of Sirromet family, but our owners are - and founder is Terry Morris, who prior to Sirromet was an extremely successful businessman in his own right, which gave him the freedom to indulge in a passion of his, which was wine making...

While the contemporary brand remained true to underlying values, the leaders had freedom to deconstruct past strategies and completely reconfigure the corporate brand. The Marketing Manager explains:

That has been and is still the re-engineering process that is going on now, because we're a very young business still. We're only - we turned 10 years old last year. We're still very much a growing business...

Sirromet had fewer constraints than its corporate heritage brand counterpart. Thus the scope of renewal was significantly broader and represented an opportunity to define the brand's heritage and identity

5.8.2 Brand Renewal in the Jewellery Industry: Comparison of Percy Marks and LeGassick

The chapter now contrasts the brand renewal practices of the corporate heritage brand Percy Marks with the contemporary corporate brand LeGassick.

Corporate Heritage Brand

The corporate heritage brand emphasised the importance of ongoing improvements to longevity. The knowledge Percy Marks generated through prior experiences informed brand renewal strategies. Renewal restrictions were due in part to Percy Mark's paradoxical essence, which necessitates leaders manage constancy and change to maintain authenticity. Rather than radical change, the leadership team emphasise evolutionary change on two key levels; ongoing improvements to the brand's core and purposeful peripheral adjustments.

However, the leadership team were decidedly conscious of the brand's constraints, revealing a potentially major weakness. The leadership team focused on evolutionary changes through the adaptation of brand content, avoiding radical change or '*changing for change's sake*'. Cameron Marks explains:

It's never big changes, but little changes are just as important – with a brand like this, you can't make big changes...or you just end up changing for changes sake.

Leaders refused to comply with industry trends that would compromise Percy Mark's authentic essence. The leadership team emphasised the significance of purposeful peripheral adjustments to the corporate brand, improving design through the integration of technology, and the fine quality of service Percy Mark's is renowned for through a bespoke service. Change for Percy Marks was moderated by brand essence, of which heritage was of primary significance. Consequently, the corporate heritage brand's constraints were greater in scope than the contemporary brand.

Contemporary Corporate Brand

LeGassick had few if any limitations in renewing the corporate brand. One leader stated:

None and that's probably the greatest thing that I like about the business is

the fact that we're in charge of our own destiny...I can do anything we want with the brand.

The lack of limitations means that the scope of renewal was significantly broader. It represented an opportunity to define the brand's heritage and contemporary identity. Creative strategies are consequently, unhampered by limitations imposed by the brand's historical learning. The case suggests that contemporary cases may be able to enact renewal changes on a small and large scale significantly more swiftly than their historical counterparts. LeGassick was devoid of the propensity or necessity of its historical counterpart to engage in multiple iterations of internal checking against historical knowledge to protect the constancy of the corporate brand's historical essence,

We are not afraid to - just because we did something last year a certain way doesn't mean that we can't pull it all apart and do it a totally different way now but still be operating with those same values'

This freedom means that while the corporate brand remains true to its underlying values, leaders have the freedom to deconstruct past strategies and completely reconfigure the corporate brand.

5.8.3 Brand Renewal in the Pearling Industry: Comparison of Paspaley and Broken Bay Pearls

The chapter now contrasts the brand renewal practices of the corporate heritage brand Paspaley with the contemporary corporate brand Broken Bay Pearls.

Corporate Heritage Brand

Paspaley emphasised the importance of ongoing improvements to longevity. Paspaley leveraged historical knowledge, generated through prior experiences, to develop brand renewal strategies. Renewal restrictions were due in part to the paradoxical essence of the corporate heritage brand, necessitating that leaders manage constancy and change to maintain authenticity. Accordingly, rather than radical change, Paspaley emphasised evolutionary change on two key levels; ongoing improvements to the core brand's core and purposeful peripheral adjustments.

The leadership team laboured continually to improve the fundamental aspects of the corporate brand. Paspaley leaders continually looked '*for new ways to improve*' the

corporate brand's *'overall proposition'*. Aspects of the corporate brand that are the focus of the leadership team's ongoing improvement include pearl culture, stakeholder engagement, brand reflectivity, customer service and organisational culture. Mr Broug expounds *'so as good as we are we will be better as we continue to evolve and embark on this journey more so'*.

The leadership team acted to strengthen and refine the corporate heritage brand. Paspaley achieved brand salience all the while protecting their authentic essence through peripheral brand adjustments. Mr Broug explains that in,

...having created a sound foundation the evolution will be always in tinkering around the margin.

So the process is ongoing. It's about making sure the building blocks are in place and to make sure that the brand will continue to evolve. My focus is on making it more attainable whilst not walking away from the core values of the brand. The quality.

For Paspaley, renewal cannot compromise the brand's cornerstone values, authenticity or vision. Therefore, leaders made purposeful changes that were consonant with the brand's values and supported the longevity of the corporate brand, especially its environmentally dependent assets. Change for Paspaley was moderated by brand essence, of which heritage was of primary significance. Consequently, the corporate heritage brand's constraints were greater in scope than the contemporary brand.

Contemporary Corporate Brand

Broken Bay Pearls had few if any limitations in renewing the corporate brand. Leaders of the corporate brand *'can't see any'* constraints. Although strategies were not constrained by the brand's historical learning, Broken Bay Pearls had significantly fewer resources than Paspaley, which was a hindrance to the brand's growth. This freedom for leaders in renewing the corporate brand is a significant opportunity that is only impeded by the brand's limited resources.

5.8.4 Brand Renewal in the Hospitality Industry:

Comparison of the Huka Lodge and the Henry Jones Art Hotel

The chapter now contrasts the brand renewal practices of the corporate heritage brand the Huka Lodge with the contemporary corporate brand the Henry Jones Art Hotel.

Corporate Heritage Brand

The Huka Lodge emphasised the importance of ongoing improvements to longevity. Brand knowledge generated through prior experiences informed the Huka Lodge's brand renewal strategies. Renewal restrictions were due in part to the paradoxical essence of the corporate heritage brand, which necessitates leaders manage constancy and change to maintain authenticity. Instead of radical change the Huka Lodge emphasised evolutionary change on two key levels; ongoing improvements to the core brand's core and purposeful peripheral adjustments. The Huka Lodge's leadership team continually improved the fundamental aspects of the corporate heritage brand. The Marketing Director explains:

We are constantly looking at new ways of evolving. Seven or eight years ago, we knew there was going to be a trend in multi-generational families. We could see people wanting to travel together. So we've created then, a cottage within the grounds, so it gives the guests who are coming, or the market we want to come to New Zealand - they can bring their families and they can have even more privacy. So it could be celebrities. It could be royal families.

The leadership team took an evolutionary approach, strengthening and refining the corporate heritage brand. The corporate heritage brand achieved brand salience all the while protecting their authentic core through purposeful peripheral brand adjustments. Leaders refused to comply with industry trends or adopt forms of communication that would compromise the brand's authentic essence,

It just evolves in a way that is not - we're not trendy. We're not - you probably used some of the words we use to describe; intimate, sensual and elegant. We're really quite sophisticated when it comes to what we're about. When I was back in the UK several years ago, they were - I was with a company that was opening a lodge, or a country house hotel, and what they were marvelling at what they were doing with regard to the food and wine delivery, the design - all those elements - we did here back in the '80s.

Instead leaders favoured strategic change that supported the corporate heritage brand's longevity, as the following quote illustrate:

We can't afford not to embrace social media or use the website as a major tool...we have to recognise that they are important channels but not get them to become the key channels of how we communicate. Because we're still quite traditional with talking...our market would much rather get the

most beautiful invitation than an email so you've got to be mindful of how you've got to communicate to your trade as well as to your clients. It's a mixture of both contemporary and traditional...So we're still preserving the traditional ways that we know worked and what we're about which is that commitment to your client and that passion and that comes across in different ways.

The leadership team developed the luxury experience the Huka Lodge provides guests, strategically 'moving away' from concepts that were once 'a huge success' because 'everyone else has copied' these. Instead they advanced the brand's heritage through ongoing innovation, sustaining their leadership in the luxury retreat category. The leadership team evolved the brand's value proposition slightly to reflect the changing values and expectations of their clientele,

So where we've ensured that we've become - we've grown, evolved, it would be delivering the food and wine story, it would be ensuring that the experiences are there, it would be ensuring that we are delivering the right amenities, all the little things around the world people expect when they go to a luxury - a product of our level.

Change at the Huka Lodge was moderated by the brand's essence, of which heritage was of primary significance. Consequently, the corporate heritage brand's constraints were greater in scope than the contemporary brand.

Contemporary Corporate Brand

The Henry Jones Art Hotel had few if any limitations in renewing the corporate brand. Leaders of the corporate brand do not perceive any limitations 'there's no constraint whatsoever'. The scope of renewal is significantly broader representing an opportunity to define the corporate brand's heritage and contemporary identity 'we're building a heritage'. Creative strategies were unhampered by the limitations that historical learning can impose. The contemporary case was devoid of the propensity or necessity to engage in multiple iterations of internal checking against historical knowledge like its historical counterpart to protect the constancy of the corporate brand's historical essence. The case shows how leaders can effectively use opposing elements of the brand's essence to sharpen the brand's contemporary identity. Leaders don't 'manage' they 'feed' the conflict, powerfully leveraging the paradoxical nature of the brand to develop brand immutabilities. The Henry Jones Art Hotel was unencumbered by the

past. Leaders remained true to the brand's underlying values yet had the freedom to deconstruct past strategies and completely reconfigure the corporate brand.

5.8.5 Brand Renewal in the Fashion Industry: Comparison of Rodd & Gunn and Ubermen

The chapter now contrasts the brand renewal practices of the corporate heritage brand Rodd & Gunn with the contemporary corporate brand Ubermen.

Corporate Heritage Brand

Rodd & Gunn emphasised the importance of ongoing improvements to longevity. The knowledge the organisation generated through prior experiences informed brand renewal strategies. Renewal restrictions were due in part to the paradoxical essence of the corporate heritage brand, which necessitates leaders manage constancy and change to maintain authenticity. Therefore, rather than radical change, Rodd & Gunn emphasised evolutionary change on two key levels; ongoing improvements to the core brand's core and purposeful peripheral adjustments. Rodd & Gunn's leadership team continually improved the fundamental aspects of the corporate heritage brand. The general manager explains:

*Well you have a consumer base at the moment, so it's how we - how you keep relevancy is probably - and so it's people who discover the brand. Then it's holding on to those people, taking them through a journey. So you have to **keep on evolving rather - and in men's, it's never a revolution. It's always an evolution.** So it's that - it's a more constant - it's like a glacier. It's always moving, but you don't actually know it's moving. It's just - it's building - it's all the elements of a brand that make people want to become part of it, the lifestyle. So it's that **authenticity**, the real stuff, **natural**, all that sort of things that make people want to be part of it. Then it's maintaining the journey.*

The leadership team took an evolutionary rather than radical approach, acting to strengthen and refine the corporate heritage brand. The corporate heritage brand achieved brand salience all the while protecting the authentic essence through purposeful peripheral brand adjustments.

...it's the fine-tuning that you do. We've kind of thought we're looking a bit too casual. We're not quite sharp enough. We're not quite crisp enough and a lot of the other fashion brands are very photoshop - very fake and we don't go overly into that at all. We try and avoid photoshop - we try and avoid those things, but we try and not fake it.

Leaders refused to comply with industry trends that would compromise the brand's authentic essence. Instead Leaders favoured strategic change that supported the Rodd & Gunn brand's longevity, as the following quote illustrates:

Well it's a - from our point of view, it's about - it's who you are and what you are and being real and authentic about that is a market positioning, I suppose. Again, brands can flip and flop from one season to the other, so it's trying to bed yourself down to who you are, what you are and keeping true to that. It's being real, being authentic, being all those sort of things.

Consequently, the corporate heritage brand evolved steadily. Change for the corporate heritage brand was moderated by brand essence, of which heritage was of primary significance. Consequently, the corporate heritage brand's constraints were greater in scope than the contemporary brand.

Contemporary Corporate Brand

Leaders had few if any limitations in renewing the Ubermen brand. Renewal was unaccompanied by the propensity, shown by the heritage brands, to engage in multiple iterations of internal checking against historical knowledge to protect the constancy of the corporate brand's historical essence. While Ubermen remained true to core values, the leaders had freedom in creatively developing strategies to configure the brand.

5.9 BRAND RENEWAL FINDINGS SUMMARY BEST PRACTICE

The five comparative case analyses explain that brand renewal has boundaries. The scope of renewal varies between corporate heritage brands and contemporary brands. Corporate heritage brands have slightly more constraints in brand renewal than their contemporary counterparts (greater willingness to take risk). The contemporary cases had fewer constraints than their corporate heritage brand counterparts did. The lack of limitations means that the scope of renewal is significantly broader, representing an opportunity to define the contemporary corporate brands' heritage and identity. Creative strategies were consequently unhampered by limitations imposed by the brands' historical learning. Thus, the evidence and arguments lead to a fourth and final proposition:

Proposition 4

Brand renewal has boundaries, and subsequently varies in scope between corporate heritage brands and contemporary brands.

5.10 SUMMARY OF BRAND HERITAGE MANAGEMENT PROPOSITIONS

The comparison of the two corporate heritage types, corporate heritage brands and contemporary corporate brands, clarifies the qualities and practices unique to corporate heritage brands. The four brand heritage management propositions that Table 5.2 outlines capture these differences, revealing the complex development nature of brand heritage management. The propositions coalesce around four core dimensions; brand essence creation, brand continuity, brand protection and brand renewal. Together the propositions provide a foundational framework for corporate heritage brand management, providing clear directives for the management of corporate heritage brands and corporate brand heritage.

TABLE 5.2 CORPORATE HERITAGE BRAND MANAGEMENT PROPOSITIONS

Corporate Heritage Brand Management Propositions

Proposition 1 *For corporate heritage brands, heritage is of greater significance than personality to the brand's essence; for contemporary corporate brands, personality is of greater significance than heritage to the brand's essence.*

Proposition 2 *Contemporary corporate brands approach brand continuity primarily through consistency; corporate heritage brands have consistency and go further to insist on constancy (clarity of identity and protection of inheritance).*

Proposition 3 *Corporate heritage brands approach brand protection in terms of standards, while contemporary brands emphasise design architecture and take a more active approach through reinforcing.*

Proposition 4 *Brand renewal has boundaries, and subsequently varies in scope between corporate heritage brands and contemporary brands.*

5.11 CONCLUSION

The characteristics of corporate heritage brands are unique and distinct from contemporary corporate brand types. Corporate heritage brands and contemporary corporate brands take different approaches to brand heritage management. The approach of the corporate heritage brands to brand essence creation, brand continuity, brand protection and brand renewal was unique. The corporate heritage brands distinctive practices and traits led to the formation of four propositions that capture these differences.

A major contribution of the findings is the identification of several core differences in how each type manages brand heritage. The rich texture of the interviews detects differences of a subtle, nuanced nature. For example, brand continuity is managed through brand consistency in contemporary corporate brands, but with a combination of brand continuity and brand constancy in corporate heritage brands. More generally, corporate heritage brands are more zealous and tenacious in safeguarding their brand heritage. The proposed four proposition conceptual framework to guide corporate heritage brand management addresses brand essence creation, brand continuity, brand protection and brand renewal.

CHAPTER 6

CORPORATE HERITAGE BRAND MANAGEMENT: MANAGING THE TENSION BETWEEN BRAND HERITAGE AND INNOVATION

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CORPORATE HERITAGE BRAND MANAGEMENT: MANAGING THE TENSION BETWEEN BRAND HERITAGE AND INNOVATION

6.1 INTRODUCTION

Corporate heritage brands as a symbol of the past, present and future, represent an interesting and potentially valuable source of information on how brands can endure. Corporate heritage brands require a specific brand management approach. The historical component of Study 2 compares the longitudinal brand management practices of five corporate heritage brands. The research design is inherently and deliberately comparative, providing for the application of comparative logic and isolation of practices particular to corporate heritage brands.

Chapter 4 concludes that the failures and recovery were mainly due to brand competencies, brand stewardship and being connected to brand heritage. Chapter 5 also concludes that brand stewardship that emphasises constancy of the brand's authentic core and the development of core competencies to support brand renewal are significant to corporate heritage brand management. Chapter 6 draws upon Chapters 4 and 5 to suggest that the three pillars of corporate heritage brands are corporate brand heritage, corporate brand competencies and corporate brand stewardship. The analysis across five industries reveals the complex and developmental nature of brand heritage management. The comparisons in this data analysis are as follows:

Wine Industry

Corporate heritage brand: Tyrrell's

Jewellery Industry

Corporate heritage brand: Percy Marks

Pearling Industry

Corporate heritage brand: Paspaley

Hospitality Industry

Corporate heritage brand: Huka Lodge

Fashion Industry

Corporate heritage brand: Rodd & Gunn

6.2 METHOD OF ANALYSIS

Historical archival methods were applied to the five corporate heritage brand cases. Following the collection, evaluation and organisation of historical evidence, the data were analysed and interpreted using the method of analysing historical data described by Miller (2006, 2011) and Neuman (2006). Hollander's (1986; *et al* 2005) tradition of periodisation was foundational to the historical research.

The chronological narrative of each of the five corporate heritage brands was structured around a series of sequential time periods with relatively distinct beginning and ending points. The approach made the identification of significant similarities and differences possible, these were the basis for a framework of corporate heritage brand management. Chapter 6 is based on the analysis and interpretation of the historical archival research.

6.3 PREVIEW OF FINDINGS

Chapter 6 is structured around the three pillars of corporate heritage brand management that facilitate the presentation of the analysis:

- **Corporate brand competencies**
- **Corporate brand heritage**
- **Corporate brand stewardship**

Three periods for the two cases of Tyrrell's and Paspaley provide longitudinal evidence to support the structure. Three periods have been purposefully selected for these two corporate heritage brand cases because of their richer variability longitudinally. Table 6.1 compares the first two historical cases. A founding period explains the brands' early development and emergent values. A further two periods characterised by structural changes such as brand building, brand expansion or brand refinement illustrate the strategic issues confronting the corporate heritage brands and their management. The use of periods is the preferred method of strong historical archival analysis (Miller, 2011, 2014).

The narrative of two cases in particular were characterised by a series of significant brand related structural change. For these two cases, Tyrrell's and Paspaley, the purposeful selection of three periods was valuable. Two periods for the remaining four historical cases highlight particular aspects of corporate heritage brand management. These findings are highlighted in Table 6.2.

6.4 TYRRELL'S

Brand Foundation 1861-1930

In 1858 Edward Tyrrell acquires 320 acres of prime land in the lee of the Hunter Valley. His vision for producing quality wines, underpinned by the family maxim '*nothing is great unless it's good*' is quickly realised, his collection of 437 wine varieties from Spain and France provide a foundation for the brand's historical essence (*Tyrrell's Archive*, 2013). He develops the firm's infrastructure to support the family's emergent competencies of viticulture, planting the first vines in 1861, acquiring a hand press and constructing a winery of '*corrugated iron and ironbark*' (Paterson, 1983; *Tyrrell's Archive*, 2013).

The involvement of Dan Tyrrell and Avery Tyrrell marked an early shift and the beginning of concentrated investment and efforts directed toward developing competencies in viticulture and wine production. The brothers formed a '*formidable wine making and grape growing team*' (*Tyrrell's Archive*, 2013). Together their traditional winemaking techniques formed the backbone of Tyrrell's outstanding quality wines and brand competencies of viticulture and wine making. Their meticulous approach to viticulture was guided by the family maxim, ensuring that Tyrrell's vines would '*continue to produce fruit for Tyrrell's benchmark wines, some 130 years after they were planted*' (Upton and Tyrrell, 2008, p. 14). Edward, Dan and Avery Tyrrell created a foundation for the three pillars of brand competencies, brand heritage and brand stewardship.

Brand Building 1959-1969

The period of 1959 to 1969 is characterised by major structural changes to the Tyrrell's brand that support concentrated brand building. Murray Tyrrell took full responsibility of Tyrrell's in 1959 (Lofts, 2010). His vision of building the reputation of the Tyrrell's brand leads to a marked strategic shift in the firm's strategy. Murray devotes himself to building '*loyalty to the Tyrrell brand*' (Evans, 1980; Tyrrell's, 2008, p. 18).

TABLE 6.1 COMPARISON OF THE FIRST TWO CASES

| Tyrrell's | Paspaley |
|--|--|
| <i>Period 1: Foundation and prosperity</i> | |
| 1861-1930 | 1919-1965 |
| <p>Creation of a foundation for the three pillars of brand heritage, brand competencies and brand stewardship.</p> <p>Edward Tyrrell acquires 330 acres of land in the lee of the Hunter Valley in 1858. He develops Tyrrell's infrastructure planting first vines in 1861, acquires a hand press and constructs a winery. Plants first vines in 1861, harvests first vintage in 1864. Involvement of 2nd generation Edward (known as Dan) and Avery Tyrrell in the business marks a strategic shift. The brothers employ traditional winemaking techniques and are meticulous in approach to viticulture underpinned Tyrrell's foundational competencies. Emphasis upon developing the quality of the wines, and the majority was bought by merchants and other makers most notably Maurice O'Shea at Mount Pleasant 'who repeatedly won top awards' (Paterson, 1983, p. 49).</p> | <p>Creation of a foundation for the three pillars of brand heritage, brand competencies and brand stewardship.</p> <p>Nicholas Paspaley Sr. was part of a thriving industry, diving for mother-of-pearl shell. By 1932, at the age of 18 was at the helm of his own pearling lugger. Nicholas Sr. made progressive decisions relating to pearl culturing, investing in equipment to begin experimenting with culturing pearls, operationalising his vision of culturing pearls of quality and beauty to match the natural pearls 'that by then were virtually extinct'. Nicholas Sr. brought the innovative Japanese culturing techniques to the South Seas In the early part of the 1950s, founding the Paspaley Pearling Company in 1952. Nicholas Sr. and his wife Vivienne establish traditions of excellence, quality and ingenuity.</p> |
| <i>Period 2: Brand Building</i> | |
| 1959-1969 | 1980-1988 |
| <p>Tyrrell's integrates the three pillars of brand competencies, brand heritage and brand stewardship.</p> <p><i>Pillar 1 Corporate Brand Competencies</i> Continued investment in the development of competencies in viticulture and wine making. Murray Tyrrell (3rd gen) establishes a further competency in the form of sales and marketing. Mike De Garis appointed to Technical manager with the role of developing the quality of Tyrrell's wines. Murray invests his resources in developing new merchandising and promotional methods to establish sales and marketing as third competency. A professional sales bench replaces the long wooden table that was used as a sales counter enabling the application of more sophisticated retail merchandising methods. In 1961, Tyrrell's introduces a of unique way of labelling and releasing wine with the release of reds Vat 5, 7 and 9.</p> <p><i>Pillar 2 Corporate Brand Heritage</i> Brand's historically defined values remain central to the brand's essence. Traditions of viticulture and wine crafting established by Dan Tyrrell fiercely defended by Murray Tyrrell. Murray Tyrrell through his progressive approach contributed to the brand's legacy and extended the brand's story.</p> <p><i>Pillar 3 Corporate Brand Stewardship</i> Murray Tyrrell confidently experiments with new techniques to improve and protect brand's legacy. He maintained the winemaking traditions forming the backbone of Tyrrell's quality wines. He is prepared to take risks yet is unwavering in his commitment to the brand's core values and acclamation for the brand's heritage.</p> | <p>Paspaley integrates the three pillars of brand competencies, brand heritage and brand stewardship.</p> <p><i>Pillar 1 Corporate Brand Competencies</i> Continued investment in the research and development of pearling techniques, to develop the brand's core pearling competency. Focused investments in research and development, with years of experimentation enabled the development of pearl cultivation techniques that are suitable for the Pinctada Maxima and Australian conditions. Paspaley saw success with the first commercial harvest in 1984. Paspaley establishes a further competency in marketing. The marketing competency is significant to the development of the brand's international profile and leadership.</p> <p><i>Pillar 2 Corporate Brand Heritage</i> Discoveries and innovations advanced the brand's legacy. Nicholas Paspaley Jr. elevated the brand's values to strengthen the brand's heritage. Nicholas Paspaley Junior's passion for pearling inspired by his father and his keen eye for detail advanced the brand's core value of excellence and added to the brand's heritage. The strategic purchase of the historic Kuri Bay pearl farm in 1990 and its subsequent integration into the brand's story enriches the brand's story.</p> <p><i>Pillar 3 Corporate Brand Stewardship</i> Nicholas Paspaley Jr. inherits the company following the death of Nicholas Paspaley Sr. in 1984. His approach to the brand's heritage is future oriented and his leadership progressive, marking a strong period of brand governance in the brand's history. He makes progressive decisions concerning the company's direction, diversifying company interests and expanding operations to support company growth.</p> |

*Period 3: Brand Expansion***1972-2000**

Tyrrell's integrates the three pillars of brand competencies, brand heritage and brand stewardship.

Pillar 1 Corporate Brand Competencies

Strengthening and ongoing development of competencies in viticulture, winemaking and marketing. Andrew Spinanze joins Tyrrell's in 1981. Under Murray Tyrrell's direction he is placed in control of all chardonnay production. In 1985 he is appointed assistant winemaker and in 1989 chief winemaker. He was instrumental in the advancement of Tyrrell's winemaking and viticulture competencies. In 2004 he was named 'winemaker of the Year' by two prominent wine magazines in Australia (*Tyrrell's Archive*, 2011). Marketing evolves as the firm embraces a greater focus on branding.

Pillar 2 Corporate Brand Heritage

Bruce Tyrrell (4th gen) advances the brand's heritage. He strengthens the historically central core value of family through his passion and leadership. Tyrrell's remained proudly family owned, enjoying the company of a small elite group of wineries as a member of 'first family wineries of Australia'. Elevation of the brand's core value of quality as acclaim continues to grow for Tyrrell's wines, underpinned by strategic decisions to improve quality. The premium brand market position reflects the brand's heritage of expertise. Tyrrell's 25th anniversary release represents a return stylistically to what made the brand famous. Tyrrell's also celebrates its 150th anniversary, releasing a book that detailed the brand's legacy.

Pillar 3 Corporate Brand Stewardship

Bruce Tyrrell takes full responsibility of Tyrrell's in 1974, strengthening Tyrrell's reputation and advancing the brand's legacy. He strategically extends Tyrrell's borders outside of the Hunter with the purchase of Glenbawn Estate and Brokenback Vineyard in 1988, McLaren Vale and Heathcote properties in 1994 and St Mary's Vineyard in 1995. Although questionable in terms of Hunter Valley Tradition, the pioneering expansion strengthened the corporate brand's longevity and was instrumental in escalating quality and consistency.

1988-2002

Paspaley integrates the three pillars of brand competencies, brand heritage and brand stewardship.

Pillar 1 Corporate Brand Competencies

Strengthening of competencies in pearling and marketing, and establishment of competencies in retail branding and jewellery design. Ongoing investments in pearl marine engineering, aviation and research to advance pearling techniques. Paspaley purchases Skywest Aviation in 1997, establishes operations to minimise disturbances to shell beds and reduce mortality rates, continues to increase its pearl farms and extend its ships which include Clare II, Odin II, Paspaley II and Marilynne. Paspaley strategically increases advertising, engages the public relations expertise of the Arc Factory and forms the South Sea Pearl Consortium in 1995 to strengthen the marketing competency.

A growing portfolio of flagship stores in strategic locations including Sydney, Melbourne, Broome, Hong Kong and Dubai enhances the brand's image and introduces a retail-branding competency. Paspaley leverages the expertise of prominent Australian designers commissioning works in 1993 and 1997, and then in 2000 employs jewellery Jurgen Kammler to set up Paspaley's \$1 million jewellery workshop to establish a jewellery design competency. Launch of first Paspaley pearl jewellery collection in 2001 soon followed with second in 2002.

Pillar 2 Corporate Brand Heritage

The Paspaleys advance the brand's heritage. Brand value 'excellence' remains central to the brand's 'core pearling business' and is advanced through the production of illustrious specimens the firm maintains are the 'most beautiful pearls in the world'. In 2002 the priceless 20mm Paspaley pearl is discovered, extending the brand's pearling legacy. The pearl was included in the Smithsonian's pearl exhibit, enriching Paspaley's cultural significance. Paspaley donates the farm support vessel Vivienne to the Australian museum at Bullocky point, symbolically celebrating the contribution of Paspaley matriarch Vivienne to Paspaley's legacy.

Pillar 3 Corporate Brand Stewardship

Nicholas Jr. makes progressive decisions concerning the company's direction, diversifying company interests and expanding operations into aviation, ship repair and engineering, farming and commercial properties. Marilynne Paspaley is responsible for the brand's retail brand expansion. The vertical integration provides Paspaley with greater control and standards governing quality that the brand remains 'unwavering commitment to quality'. Standards of quality are stringently maintained. Heritage centric innovation is integral for Paspaley in changing but staying the same. Design innovation was an important aspect of resolving brand heritage paradox.

He develops a *‘market for the new wines which would be sold in a bottle, proudly under the Tyrrell’s label’* (Upton, 2008, p. 20). In 1961 Murray introduces the eponymous Vat system (*Tyrrell’s Archive*, 2011). The innovative way of labelling and releasing wine through a formalised system enhanced *‘the value of wine’*, developing preferential respect among wine consumers and in turn their loyalty to the corporate brand (Evans, 1980, p. 81).

Tyrrell’s core **brand competencies** of viticulture and wine making remain central to the brand’s authentic essence and are foundational to this period of brand building. Murray Tyrrell strategically invests in the strengthening and ongoing development of these core competencies. He appoints Mike De Garis Tyrrell’s Technical Manager *‘to continue the Tyrrell tradition’* (Paterson, 1983, p. 37). A decision that enabled Murray to oversee the business. Tyrrell’s develops a third competency during this period of sales and marketing. Murray Tyrrell *‘spends a great deal of time developing new merchandising and promotional methods’* (*Vineyards of the Hunter Valley*, 1971, p. 38). The ongoing development of and innovation in the brand’s core areas of competencies are significant to the governance of the corporate heritage brand.

Tyrrell’s **brand heritage** is strengthened during this period of brand building. Murray Tyrrell was *‘enormously proud of his family’s achievements in Australia’* and *‘continuously set out to maintain’* the *‘standards set by his uncle Dan’* (Paterson, 1983, p. 32). He had been *‘well tutored’* by Dan in Tyrrell’s traditional winemaking methods, which facilitated the transferal of knowledge and central values between the generations (Paterson, 1983, p. 32; *Tyrrell’s Archive*, 2011). Tyrrell’s advanced its brand heritage as Murray Tyrrell makes a distinct contribution to the legacy of his forebears and enriches the brand’s heritage through his progressive approach to the corporate heritage brand.

Brand stewardship was significant to the management of the Tyrrell’s corporate heritage brand during this period. Murray Tyrrell’s governance of the brand resolves the tension of change and continuity for the brand during this period. Murray Tyrrell belonged to the *‘old school of winemakers who treasure old vines and traditional winemaking methods’* however was still *‘prepared to embrace new ideas’* (Lewis, 2003a, p. 40). Murray confidently experimented with new techniques and technological advancements, which, although not always successful, generated valuable brand

knowledge that strengthened core brand ideals and governed, brand change. The evidence demonstrated that Tyrrell's integrated the three pillars of brand competencies, brand heritage and brand stewardship.

Brand Expansion 1972-2000

The period of 1972 to 2000 is characterised by major structural changes to the Tyrrell's brand that support significant brand expansion. Tyrrell's strategic focus shifts from brand building to brand expansion. In 1972 Tyrrell's entered the US market with 1000 cases, expanding the corporate brand's stakeholder base and signalling the beginning of a period of growth spearheaded by fourth generation Tyrrell, Bruce who takes full responsibility of the corporate heritage brand in 1974 (Paterson, 1983, p. 34; *Tyrrell's Archive*, 2011; Upton, 2008).

Tyrrell's core **brand competencies** of viticulture and wine making remained central to the brand's authentic essence during this period. The brand's competency of sales and marketing evolves into a branding competency. Tyrrell's continues to invest in developing their core competencies, Andrew Spinanze joins Tyrrell's in 1981 and under Murray Tyrrell's direction is placed in control of all chardonnay production. He is appointed assistant winemaker in 1985 and chief winemaker in 1989 (*Tyrrell's Archive*, 2011). He was particularly instrumental in the advancement of Tyrrell's competencies of winemaking and viticulture, evidenced by Tyrrell's illustrious track record of excellent wines and ongoing accolades. The firm continues to invest in marketing and promotion yet increasingly embraces branding as a means to elevate the brand's market position and strengthen the brand's substantial equity.

Tyrrell's **brand heritage** is strengthened during this period of brand expansion. Tyrrell's extends its borders outside of the Hunter Valley to McLaren Vale, Coonawarra, the Limestone Coast and Heathcote (Cook, 1998; Port, 1995; Upton and Tyrrell, 2008) bringing constancy to the brand's legacy of quality (Port, 1995; Lewis, 2003b). During this period of major brand changes Tyrrell's returned stylistically to what made the brand famous with a 125th Anniversary release (Paterson, 1983, *Tyrrell's Archive*, 2011). The historical referencing conveyed constancy to stakeholders during the period.

Brand stewardship was significant to the management of the Tyrrell's corporate heritage brand during this period. Bruce Tyrrell strengthened the brand's legacy through innovative decisions to expand. These decisions protect and concurrently progress the brand's heritage. Like his father, Bruce Tyrrell made a series of significant contributions that advance the corporate heritage brand's pioneering legacy. In addition to strengthening the brand's quality essence through constancy he pioneered the development of the Semillon variety (Lofts, 2010; *Tyrrell's Archive*, 2011). The stewardship of Bruce, strengthened the brand's reputation for quality, advanced the brand's illustrious heritage and secured the brand's longevity. The evidence demonstrated that Tyrrell's integrated the three pillars of brand competencies, brand heritage and brand stewardship.

6.5 PASPALEY

Brand Foundation 1919-1965

Nicholas Paspaley Senior fled the Greek island of Castellorizo during World War I to arrive in Australia in 1919 and at just 14 years of age became a part of a thriving yet precarious industry, diving for mother-of-pearl shell (Schwab, 1953; *The New York Times*, 1916; *The Australian Women's Weekly*, 1939; *Northern Standard*, 1949, 1953a). By 1932, at the age of 18, he was at the helm of his own pearling lugger and by the early 1950s had 3 substantial ships diving for shell to fulfil the global demand for button making (Janiszewski and Alexakis, 1990; *The Sydney Morning Herald*, 1953). His fleet remained economically viable until the collapse of the pearl shell market. The crash marked a significant strategic shift for Paspaley. Nicholas Paspaley made progressive decisions relating to commercial pearl culturing, investing in equipment to begin experimenting with culturing pearls.

Paspaley employed Japanese technicians, who brought their secret oyster-farming methods, to develop the Australian Pearling Industry, applying their innovative culturing techniques to the *Pinctada Maxima*. In 1952 Nicholas Paspaley founded the Paspaley Pearling Company (James, 2001; *Northern Territorian*, 2000; *Paspaley Magazine*, 2005). In 1963, the Paspaley Pearling Company entered into a working arrangement with a Japanese firm, Arafura Pearling Company. Disaster struck the early Australian crops and most of the oysters died. However, this led to the discovery that the larger Australian oyster was a '*more delicate creature and techniques used so*

successfully in Japan needed to be adapted for the local variety' (Martin, 1997). Nicholas Paspaley created a foundation for the three pillars of brand competencies, brand heritage and brand stewardship.

Brand Building 1980-1988

The period of 1980 to 1988 for Paspaley involved major structural brand change to support concentrated brand building efforts. Paspaley advances its core **brand competency** of pearl cultivation during this period. Controlled creativity in the form of ongoing investments in research and development supported Paspaley's innovative pearling techniques and strengthen the brand's expertise. Paspaley's cognitive creative processes advanced innovation and made remarkable discoveries possible, including the discovery of a way of cultivating larger pearls.

Nicholas Paspaley Senior and Jnr, who had become involved in the development of a radical new pearl farming system suitable for the Australian shells and conditions, finally saw success with the first commercial harvest in 1984 (*Northern Territorian*, 2000). Discoveries such as these represent core competency innovation, which advanced the brand's heritage and built on the legacy of Nicholas Paspaley Senior. The development of a marketing competency supported the core competency of pearl cultivation. Efforts were increasingly directed toward brand building brand awareness and a profile that is commensurate with Paspaley's exceptional pearls.

Paspaley advanced its **brand heritage** during this brand-building period. In 1986 Paspaley purchased the Roebuck Deep Pearls Company and in 1990 the Pearls Proprietary Ltd firm which included the historic Kuri Bay pearl farm, named after Mr Kuribayashi (*N.T. Rural News-Magazine*, 1978; *Australian Fisheries*, 1980; Bowditch, 1980; Doubilet, 1991; Edwards, 1994; *Paspaley Magazine*, 2005). The acquisition strategically extended the brands control over the South Sea pearling industry. As the first pearl farm established in Australia, Kuri Bay pearl farm strengthened the cultural component of the brand's heritage (Aquilina, 1994). Paspaley enhanced its brand equity and heritage quotient; integrating the pearl farms history into its own story marking 'fifty years at Kuri Bay' in 2005 by examining 'its remarkable place in Australia's pearling industry' (*Paspaley Magazine*, 2005, p. 6).

In 1984 Nicholas Paspaley Senior passes away and Nicholas Paspaley junior inherits the company, Mr Paspaley and his two sisters Roslynne Bracher and Marilynne Paspaley take over the company. Their **brand stewardship** is significant to Paspaley's international leadership. Nicholas Paspaley makes progressive decisions concerning the company's direction. He diversifies company interests, expanding operations into aviation, ship repair and engineering, farming and commercial properties. These divisions support the growing demands of the pearling business. The vertical integration provides Paspaley with greater control over the quality of services and protects the brand's central tenet unwavering commitment to 'quality' (*Territory Quarterly*, 2006, p. 10). The evidence demonstrated that Paspaley integrated the three pillars of brand competencies, brand heritage, and brand stewardship.

Brand Expansion 1988-2002

The period of 1988 to 2002 for Paspaley involved major structural brand change to support ongoing corporate brand building and corporate brand expansion. By the early 1990s the Paspaley Pearling Company controlled 60 to 70% of Australia's cultured pearl industry (Hoy, 1999, 2002). The Paspaleys continued to strengthen and develop their core competencies. Ongoing development and maintenance of the brand's purpose built infrastructure strengthened the Paspaley's core pearling competency (Jones, 1998). The brand's modern infrastructure comprised of a fleet of ships and Grumman Mallards, floating laboratories and pearl farms in pristine locations.

Paspaley strengthened its core pearling competency during this period and advanced the brand's heritage by extending the brand's **core competencies**. The family continue to invest in pearl marine engineering, aviation and research to support the brand's core pearling competency. For example, in 1996 Nicholas Paspaley invested \$9 million in a 'state of the art lab unrivalled by any producer in the world' (Townshend, 1996, p.29). In this period Paspaley established its design innovation competency. Initially Paspaley leveraged the expertise of prominent international designers through strategic collaborations (*Territory Business*, 2000). In 1997, Paspaley launched a modern collection with the prominent Australian designer Collette Dinnigan. The collection is presented during the prêt-à-porter Paris fashion showings in October where Karl Lagerfeld describes the pearls as the 'must have' for the year (Hoy, 1997, p. 7). The purpose of partnering with the prominent Australian Collette Dinnigan brand was to

convey the pearls Australian provenance. In 2000 Paspaley employed jeweller Jurgen Kammler to set up Paspaley's new \$1 million jewellery workshop in Darwin (Baxter, 2001). His first collection for Paspaley, which took 12 months to is launched in 2001.

Paspaley continued to strengthen its competency in marketing. The competency supported the brand's market position and leverages the brands other competencies. The marketing competency evolved into a branding competency with a distinct retail focus. The Paspaley's developed the brand's image through an integrated marketing strategy that included event marketing, celebrity endorsement and advertising. In 2001, Paspaley Pearling increased its advertising spending by 500% targeting consumers in the domestic market specifically a slightly younger consumer (*Ad News*, 2001). Paspaley also drew on the expertise of the Arc Factory to manage retail public relations. These investments denote ongoing competency development. Further in 1995, Paspaley formed the South Sea Pearl Consortium with the strategic intention of educating the buying public about how to discern the genuine article from inferior imitations (Hessen, 1995; *Rag Trader*, 1999; Shor, 1995). Thus, building the brand's market leadership and reputation for superior pearls. Flagship stores in strategic boutique locations extended the Paspaley's control over the consumers' brand experience (Schupak, 2000), and supported the brand's emergent fashion forward positioning.

In this period of brand expansion, Paspaley strengthens and advances its **brand heritage**. The Paspaleys strengthened the cultural component of the brand's heritage, extending the brand's story and enhanced the value of the firm-specific resource. In 2000, the remarkable discovery of a 20mm pearl, the only known of its size, advanced the Paspaley's heritage. Mr Paspaley who likened the priceless pearl to a '*molten strawberry*' eponymously christened it '*The Paspaley Pearl*' (Baxter, 2002, p. 21). As the only cultured pearl to be included in the Smithsonian's exhibit '*The allure of pearls*' (Schmid, 2005a, p. 7, 2005b, 2005c; Waters, 2005), Paspaley strengthened its historical significance, enhanced cultural associations and its international authority. Following the death of Paspaley matriarch, Vivienne Paspaley, Nicholas donates the 33-metre pearl-farm support vessel '*Vivienne*' to the Maritime Museum at Bullock Point (Bradley, 2003, p. 42). The gift is symbolic of her contribution to Australia's South Sea pearling industry. Furthermore it conveys the brand's constancy and cultural significance. The Paspaley family leveraged Paspaley's brand heritage as a source of

inspiration to advance the core tenets of the corporate heritage brand. Thus, heritage is a dynamic, co-created brand resource.

The Paspaley's **stewardship** of the brand is foundational to the corporate heritage brand's management during this period. As Marilynne Paspaley recalls '*quality was everything. Nick did it on the pearling side. I did it in the retail side*' (*Territory Quarterly*, 2006, p. 11). Marilynne Paspaley's leadership was pivotal to the advancement of the Paspaley brand. She extended the brand's foundational value of quality to retail, built the brand's retail division and established standards that governed retail growth to create an authentic retail brand experience. Nicholas Paspaley deliberately departed from the Japanese's traditions of pearling and embraced sustainable pearl practices that would protect the brand's endurance and perpetuate the brand's core value of quality (*Mystique of the pearl*, 1997; *Paspaley Magazine*, 2005).

In his role as an activist, he embraced change and improved the environmental standards of the Australian pearl industry (*Jewelers' Circular Keystone*, 1994). These improvements included implementing operations that minimised disturbances to shell beds and reduced mortality rates (Hoy, 1999). In 1999 Nicholas Paspaley's '*service to business development and trade, to the pearling industry and to the community*' is formally recognised when he is appointed a Companion in the Order of Australia (AC) (*Australian Associated Press*, 1999; Stephens, 1999). The evidence demonstrated that Paspaley integrated the three pillars of brand competencies, brand heritage and brand stewardship.

6.6 SYNOPSIS OF FIRST 2 CASES

The corporate heritage brands Tyrrell's and Paspaley demonstrate that brand competencies, brand heritage and brand stewardship are three pillars of corporate heritage brand management. The first period in each brand's narrative created a foundation for these pillars. The second period in the narrative of the corporate heritage brands was characterised by structural brand change centering on brand building, the third by expansion. Contextually specific nuances provide insight into the practical application and implications of these three pillars.

For instance, Japanese ‘*poachers*’ during the 1950s were infringing on Australia’s territorial waters borders to fish for shell, threatening the economic stability of Australian pearl fisheries (*Northern Standard*, 1953a, 1953b; *The New York Times*, 1958). Escalating hostility between Australia and Japan, lead Australia to ‘*proclaim her sovereignty*’ over the pearl shelf, enforcing licensing and control measures over all pearls (Bach, 1955; *Northern Standard*, 1953b, p. 1). This assumption of authority directly affected the Pearling industry protecting the right of Australian pearlers to Australia’s natural bounty and legally excluding the Japanese from Australia’s coastal waters. Australia was desirous of conserving the vast pearl beds by ‘*orderly fishing*’ (*Northern Standard*, 1953a; 1953b; *The New York Times*, 1953a, 1953b, 1953c; *The Sydney Morning Herald*, 1953).

The invention of the plastic button (*The New York Times*, 1928) and successive ‘*collapse*’ of the pearl shell industry (*The Sydney Morning Herald*, 1958, p. 9) marked a shift of focus for Paspaley from pearling shell to pearl cultivation. Thus partnership with the Japanese was essential (Jorden, 1955; *Mystique of the pearl*, 1997). The unrelenting and incessant challenges of the emergent industry, produced in Paspaley qualities of determination, endurance and ingenuity that have been foundational to the brand’s unique heritage of excellence.

Moreover, of the two, Paspaley was most willing to embrace change, approaching the dynamic process optimistically with the view to leverage it as an opportunity to advance its legacy. A possible explanation of the nuance is the dynamic nature of the pearling industry where the only constant is change. However, Tyrrell’s and Paspaley were each particularly strong at managing brand paradox through relevance in period two and period three. Both brands strategically advanced a core essence, while adapting peripheral brand elements to maintain relevance. Archival research was an important creative input for Tyrrell’s by stimulating organisational creativity and generating important renewal outcomes for the corporate brand. Paspaley’s approach to innovation was diverse and ranged from pearl cultivation, organisational processes, consumer brand experience and technology, to product design. Design innovation was a special form of innovation and particularly important aspect of brand governance in period 3 for Paspaley.

6.7 PERCY MARKS

Brand Foundation 1899-1935

In 1899, Percy Marks establishes the eponymous jewellery firm Percy Marks. His first store in Market street was located in ‘*one of the most fashionable areas of Sydney’s Central Business District*’ (Wallis, 1996, p.9). Percy Marks leveraged every opportunity to develop demand for Australian gemstones, lifting the gems and brand profile ‘*into popularity*’ (*The Sydney Morning Herald*, 1921, p. 9) through an aggressive promotional strategy integrating publicity with other communication channels of event marketing, advertising, public relations, community involvement, celebrity endorsement and corporate social responsibility (*The Commonwealth Jeweller and Watchmaker*, 1935; *Percy Marks Archive*, 2012).

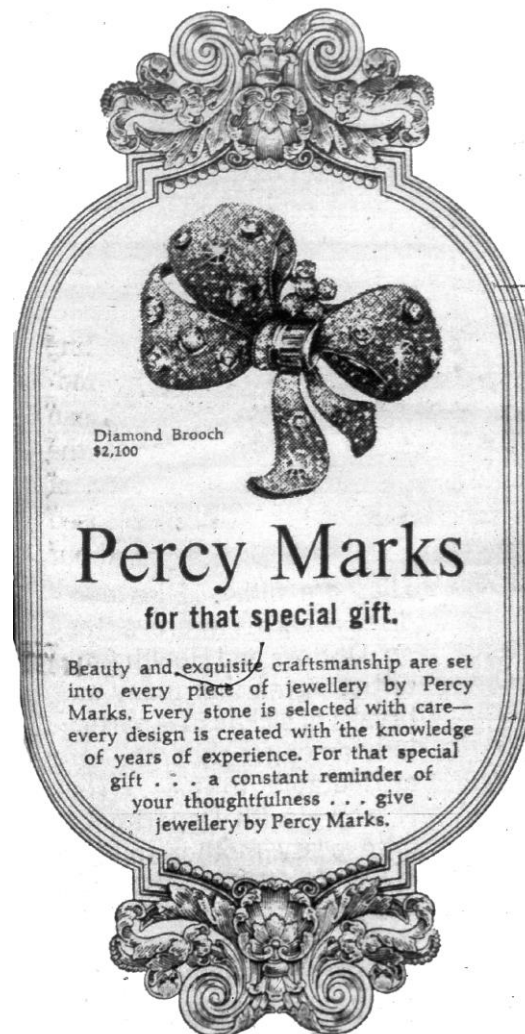
Percy Marks imbued the company with the values of quality, originality and family. The core value of quality was expressed through Percy Marks approach to service, gemstones and craftsmanship (*Morning Bulletin*, 1921; *The Sydney Morning Herald*, 1909, 1921, 1934a, 1934b). Percy Marks used only those stones with the ‘*finest qualities*’ and was frequently awarded for his work (*Percy Marks Archive*, 2012). In 1916 at the Panama Pacific International Exposition received the grand prize the ‘*highest award obtainable*’ (*The Sydney Morning Herald*, 1919, p. 1). His ‘*Exquisite and Original Creations*’ were expressions of the brand’s authentic essence (*The New Nation Magazine*, 1934).

Mr Marks continued to develop his gemmological skill set, authority and the strength of this competency through impressive acquisitions, exhibitions and education. Strategic acquisitions included the a 225 carat black opal, the ‘*largest opalised shell in the world*’, the ‘*Pride of Australia*’ in 1928 and a Russian cross, containing 10 large Brazilian diamonds, weighting around 15 carats in 1929 (*Northern Standard*, 1928, p. 2; *The Sydney Morning Herald*, 1934b). The ‘*jewel of exquisite beauty was a gift from Czar Alexander II of Russia to the gifted soprano Madame Albani*’ (*Geraldton Guardian and Express*, 1929, p. 4).

Further, exhibitions were a strategic tool that asserted the brand’s gemmological expertise and showcased the firm’s portfolio rare Australian gemstones. In 1925 the French government appointed Mr Marks ‘*officier d’instruction publique*’ in recognition

of his achievement in the interest of education (*The Sydney Morning Herald*, 1925, p. 14). The decoration is ‘rarely given to foreign subjects, being granted mostly in France to scientists and literary men’ was testament of Percy Mark’s heritage of expertise (*The Sydney Morning Herald*, 1925, p. 14). Percy Mark’s was ‘regarded as an authority’ (*Cairns Post*, 1920, p. 6). He created a foundation for the three pillars of brand competencies, brand heritage, and brand stewardship.

ILLUSTRATION 6.1 PERCY MARK’S ADVERTISEMENT 1966



Brand Refinement 1966-1985

Significant structural changes characterise the period of 1966 to 1985 for the Percy Mark’s corporate heritage brand. In 1966, Percy Marks is listed on the stock exchange to resolve the family conflict (*Inside Retailing*, 1996). Disputes concerning the management and control of the firm threaten the brand’s authentic essence, specifically the brand’s core value of family. Consequently, the focus is on resolving brand conflict rather than advancing the brand’s legacy.

Percy Mark's maintained the corporate **brand competencies** of procurement, visual merchandising and customer service, which more broadly constituted a merchandising competency. The firm's approach to service, gemstones and craftsmanship is consistent with the tradition of quality established by Percy Marks (see Illustration 6.1). An advertisement from 1966 for example notes that '*beauty and exquisite craftsmanship are set into every piece of jewellery by Percy Marks. Every stone is selected with care – every design is created with the knowledge of years of experience*' (*The Sydney Morning Herald*, 1966, p. 10). However the succession issues distract from progressive brand strategies.

Percy Mark's **heritage** is maintained during this period of brand refinement. Percy Mark's strategically utilised historical referencing throughout the structural brand changes and uncertainty to convey continuity of the corporate heritage brand to stakeholders. Advertising emphasises the legacy of Percy Marks as a *pioneer* for rare gemstones and use the corporate brands '25 years' of establishment to enforce the brand's credibility (*Percy Mark's Archive*, 1935; *The Sydney Morning Herald*, 1935a, 1935b, 1935c, 1935d, 1935e, 1935f). In 1974 Percy Mark's celebrates 75 years with '*birthday-party-prices*', birthday candles and giving away a diamond (*The Sydney Morning Herald*, 1974, p. 9).

The firm continues in the tradition of designing and handcrafting jewellery, individually selecting gemstones for their outstanding beauty and quality. However, the brand's core value of originality which was a defining tenet of the brand's authentic essence, expressed through progressive style and design, is marginalised as management's focus shifts toward resolving the issue of concession and the subsequent recovery of the core brand value of family. Percy Marks draws on brand heritage to convey constancy during this period, however focus on recovering critical brand values curtails innovation.

In 1966 Percy Marks was listed on the stock exchange (Moore, 1996). In 1978 Mr Molyneux purchases 220,000 Marks shares from Vavasour (*The Age*, 1978). Then in 1980 Kenneth Marks in partnership with Mr Molyneux purchases the company (Brooks, 1988; *Inside Retailing*, 1996; Marshal, 1998; *Percy Marks Archive*, 2012). It is not until 1985 that Kenneth Marks gains full family control of the business, recovering the

family's heritage and core value to the brand's essence (*Inside Retailing*, 1996; Marshal, 1998).

Kenneth Marks implemented a family succession protocol to protect the brand's long-term value, ensuring that the brand's value was not compromised again. To enhance the brand's flexibility in 1989 Percy placed its Castlereagh Street retail store for auction to enhance flexibility (Harley, 1989) and opens a new store in the Ramada Renaissance Hotel, supporting a greater focus on international tourist markets (Harley, 1989). Kenneth Mark's **brand stewardship** is significant to the recovery of the core brand value of family. The evidence demonstrated that Percy Mark's integrated the three pillars of brand competencies, brand heritage and brand stewardship.

Post Script: Following the recovery of the brand's authentic essence

In 1993 Kenneth Marks due to his stewardship of the brand and '*determination*' increases turnover 16% to \$10 million '*in the 1992-93 year, despite the recession*' (Ferguson, 1994).

6.8 THE HUKA LODGE

Brand Foundation 1924-1956

Irishman Alan Pye purchased 30 acres on the left bank of New Zealand's Waikato River just a '*quarter mile above the Huka Falls*' (*Huka Lodge Archive*, 2013). He leveraged his skills as an avid fisherman and '*keen horticulturist*' to develop the property into a fishing lodge. Along with the excellent trout fishing, Mr Pye's garden became a '*feature of the lodge*' (*Huka Lodge Archive*, 2013). He was a man of '*great charm and the possessor of a gift for storytelling*' and the '*cooking of his wife Leila was world famous*' (Blair, 1956, p. 33). Together they made '*a visit to the lodge a memorable occasion*' (Blair, 1956; *Huka Lodge Archive*, 2013).

He and his wife built an international reputation for the Huka (*Herald Correspondent*, 1987; *Huka Lodge Archive*, 2013b). Defining elements of the lodge experience included communal dining, an open fireplace, hunting, fly-fishing and memorable hospitality. Although facilities were decidedly simple, the experience the Huka experience was anything but ordinary. The Huka Lodge received many prominent guests including the Queen Mother who '*caught a trout during a brief visit*' (*Huka Lodge Archive*, 2013).

Alan Pye created a foundation for the three pillars of brand competencies, brand heritage, and brand stewardship.

ILLUSTRATION 6.2 HUKA LODGE ALAN PYE COTTAGE



Brand Building 1984-1995

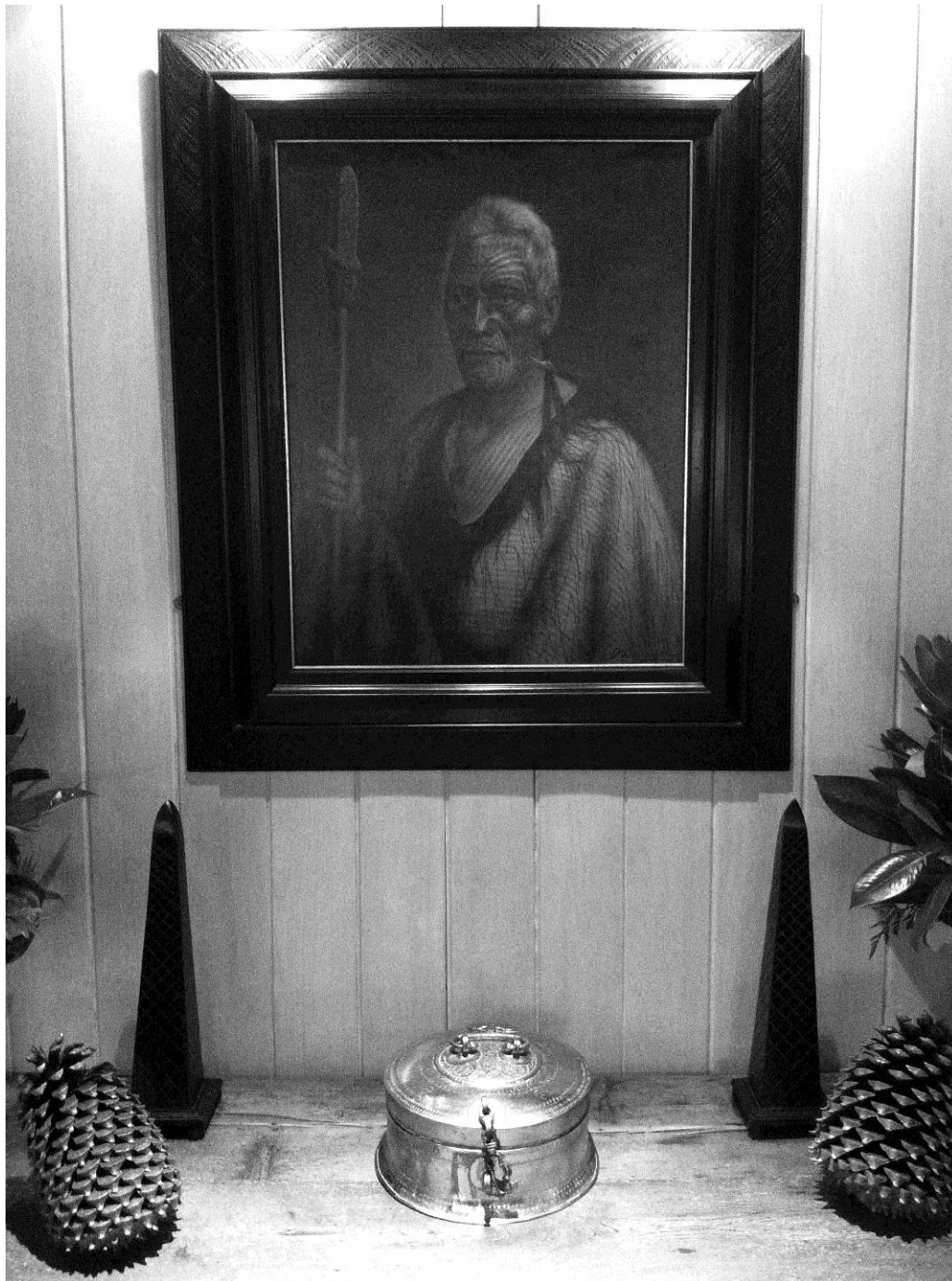
Significant structural change characterised the period of 1984 to 1995 for the Huka Lodge corporate heritage brand. In 1984 Alexander van Heeren purchased the Huka Lodge and its surrounding 17 acres of parkland. Despite the lodge's dilapidated condition, its mythical surrounds inspired van Heeren to create '*one of the finest [retreats] in the Southern Hemisphere*' spending several million to achieve his vision (*National Business Review*, 1991; Orman, 1986; Richardson, 1991; Rogers, 1995; *Travel News Asia*, 1985). He enlisted the design expertise of the contemporary New Zealand designer Virginia Fisher and landscape architect Mary Mazingo to transform the lodge into an exclusive retreat and establish a design **brand competency**.

The competency was instrumental in the management of the brand's paradoxical essence. The Lodge design visually conveyed the brand's relevance (see Illustration 6.2). Meanwhile, design elements the addition of dressing rooms, rich décor, elegant crystal, Scottish tartan fabrics, fine wicker furniture and glass ceilings in the bathrooms symbolically expressed a sophisticated brand personality (Birrell, 2013; *Huka Loge Archive*, 2013; Mackey, 1986; McCall, 2013). Van Heeren strengthened the core competency of hospitality, lifting the lodge's standards to support the brand's exclusive positioning. He improved the quality of service through selective recruitment, training and employee value alignment. He encouraged friendly pre-emptive service and developed a strong team that supported the retreats offering of luxury, relaxation, superb cuisine and wine in impeccably beautiful surroundings.

Mr van Heeren advanced the Huka Lodge's brand heritage. He elevated the brand's positioning to reflect the authentic aura, rich heritage and exclusive offering of the corporate heritage brand. His progressive approach to quality and hospitality elevated the core values giving them a more impressive expression. Subtle alterations to social conventions were reflected in the formality of the Huka Lodge's service offering '*we try to make this a classic experience, but not too formal. We want to make people feel comfortable here*' (Richardson, 1991). The lodge's classic experience retains historically defining elements Alan Pye introduced which ground such changes. These include including the communal cocktail hour, blazing fire, elegant yet homely lounge room and fly-fishing (Rogers, 1986; Nielsen, 2013). Tribal antiquities and heritage imagery strategically reference the site's historical significance to enhance the brand's authentic aura and mythical quality (see Illustration 6.3). Further, designer Virginia

Fisher was '*stylistically...prompted by the history*' of the property, infusing the décor with a spirit of adventure that centered on the '*magical surroundings*' (McCall, 2013). Marketing communications were avenues for brand storytelling. Through which, leaders promulgated legends of romance, adventure and mystery, which enriched the brand's identity and provided a culturally rich backdrop for the brand's exclusive positioning.

ILLUSTRATION 6.3 PAINTING OF MAURI LEADER INSIDE THE HUKA LODGE



Alex van Heeren's **stewardship** of the Huka Lodge is foundational to the strength and progression of the corporate heritage brand during this period. His approach to the lodge's renovations and ongoing operations was uncompromising. He explained that '*At Huka Lodge we are trying to do the job to the highest of standards*' striving for '*excellence*' and only that level is acceptable (Orman, 1986). He emphasised design excellence, balancing traditional service with sophisticated design elements. He established a tradition of excellence in hospitality, establishing a prestigious international reputation and advancing the brand's heritage. European hoteliers Monique and Co Engels appointment strengthened the Huka Lodge's organisational culture of excellence. They also imbued a European quality to the lodge's service standards, leveraging their solid European experience to enhance the lodge's exclusive offering (*Huka Lodge Archive*, 2013; Mackey, 1986). The evidence demonstrated that the Huka Lodge integrated the three pillars of brand competencies, brand heritage and brand stewardship.

6.9 RODD & GUNN

Brand Foundation 1920-1946

Rodd & Gunn's origins date to the 1920s when Hutchison and Co. a producer of quality menswear began building consumer brand preference for Lichfield shirts. The brand leveraged the organisation's tailoring expertise and developed competencies in design and product development. The brand's emphasis on quality of materials and tailoring was mirrored by its distribution strategy. The shirts were sold through New Zealand's leading outfitters and department stores to ensure clientele received knowledgeable and personalised service.

Lichfield continued to strengthen brand preference among consumers through frequent advertisements in leading New Zealand papers. These consistently emphasised the brand's key points of difference especially the '*faultless fit*', '*latest designs*' and '*exclusive patterns*' (*Auckland Star*, 1941; *The Press*, 1924a, 1924b, 1924c, 1924d, 1925a, 1925b, p. 7). The brand's market leadership and reputation were protected through trademark registration. Innovative designs that combined technical materials such as Fujilene with progressive tailoring techniques enhanced the brand's wearability, making Lichfield garments suitable for '*sports or everyday wear*' (*Auckland Star*, 1940, p. 4).

One significant innovation was the point-setter collar that provided ‘*stiff collar comfort, minus the wrinkles*’ without ‘*starch*’ (Auckland Star, 1937; Ellesmere Guardian, 1938, p. 6). The ‘*famous Point Setter Coat Shirt*’ was introduced in the latter half of the 1930s; it was made ‘*from the very finest British Poplin Shirtings*’ and was very successful for retailers (Auckland Star, 1940; Ellesmere Guardian, 1938; New Zealand Herald, 1940, p. 15).

Lichfield strengthened core areas of expertise and evolved the brand’s visual identity. For example, Lichfield registered ‘*Point Setter*’ for trademark protection in 1934 and again in 1946, following a series of refinements specifically to the setter dog (IPONZ, 1946). The setter dog (see Illustration 6.4) became a foundational heritage icon for the Rodd & Gunn brand. Moreover the Lichfield Point-Setter brand created a foundation for the three pillars of brand competencies, brand heritage, and brand stewardship.

ILLUSTRATION 6.4 POINT-SETTER TRADEMARKED LOGO 1946



TABLE 6.2 COMPARISON OF FINAL THREE CASES

| Percy Marks 1899-1935 | Huka Lodge 1924 -1956 | Rodd & Gunn 1920-1946 |
|--|--|---|
| <i>Time Period 1 Foundation</i> | | |
| <i>Brand Competencies</i> | | |
| <p>Establishes core competencies of design innovation, merchandising (procurement, visual merchandising and customer service) and promotion. Strategic development of gemmological skill set through strategic acquisitions, notably the ‘<i>Pride of Australia</i>’ in 1929, formation of key international relationships and international exhibitions such as the <i>Foir de Lyon</i> in 1920 (<i>The Commonwealth, Jeweller and Watchmaker</i>, 1935). Percy Mark’s exhibits were ‘<i>magnificent</i>’, showcasing his consummate artistry, gemmological expertise and merchandising capabilities (<i>Percy Marks Archive</i>, 2012). Promotion, marketing initiatives and strategic munificence were important marketing tools that generated positive publicity.</p> | <p>Establishes core competency of horticulture and hospitality. Hospitality comprises a series of elements that include culinary skills, entertainment of guests and generous service. Leila Pye’s culinary skills were world renowned, enhancing the Lodge experience with game centered meals Alan Pye’s passion and horticultural expertise underpinned the property transformation from overgrown scrub to a fishing retreat. His storytelling skills also assured guests of entertainment. Moreover, as an expert fly fisherman, he leveraged his knowledge of the sport to enrich the experience of guests. Together the Pye’s ensured that guests had a memorable experience.</p> | <p>Establishes core competencies of tailoring, design and product development. Lichfield introduces product innovations that include Fujilene (1925), and Duralla (1926). The point-setter product line was a significant innovation that began with a collar that required no starch yet maintained its shape, followed by the Point-setter coat shirt (<i>Auckland Star</i>, 1937; <i>Ellesmere Guardian</i>, 1938). Lichfield combined innovative tailoring, wear-ability. These core competencies were supported by a supportive promotional competency. Consistent brand promotions continued to reinforce the brand’s market leadership and the core competencies of the Lichfield brand.</p> |
| <i>Brand Heritage</i> | | |
| <p>Percy Marks defined the brand’s heritage through his pursuit of exceptional gemstones. He tirelessly championed for the rightful appreciation of the opal. His narrative is interwoven with royalty, celebrities and other powerful figures. His creativity, passion, ‘<i>knowledge of geology and matters pertaining to gems and the lapidary art</i>’ and dedication to quality were a platform for future generation (<i>Masonic club Journal</i>, 1935). The Percy Mark’s brand develops strong cultural associations and is an international leader that championed geological education.</p> | <p>Alan Pye and Leila Pye defined the Huka Lodge’s heritage through their generous hospitality and passion for angling. Defining elements of the lodge experience were communal hunting, fly-fishing and memorable hospitality. The Lodge’s provenance is a fundamental component of the brand’s heritage. The lodge experience emphasised adventure and connection with the magical location. The Huka Lodge received many prominent guests, prime ministers, business leaders and royalty including the Queen Mother.</p> | <p>The brand’s heritage is defined by the value of quality that is at the brand’s authentic core. The brand’s core value of quality was expressed through tailoring, design and materials. The brand’s narrative is positioned within New Zealand, this provenance is a significant aspects of the brand’s authentic core. Brand imagery of stylish men engaging in a variety of pursuits, explicitly sport. The setter symbol developed iconicity and as such was of central significance to the brand’s heritage. Thus, protected through trademark registration.</p> |
| <i>Brand Stewardship</i> | | |
| <p>Strong stewardship of the corporate brand. Progressive and purposeful management positioned the corporate brand as a leader. Creation of a foundation for the three pillars of brand heritage, brand competencies and brand stewardship.</p> | <p>Strong stewardship of the corporate brand. Progressive and purposeful development of the brand. Progressive development by the Pye’s positioned the lodge as a leader. Creation of a foundation for the three pillars of brand heritage, brand competencies and brand stewardship.</p> | <p>Strong stewardship of the corporate brand. Progressive and purposeful development positioned the brand as a leader. Creation of a foundation for the three pillars of brand heritage, brand competencies and brand stewardship.</p> |

*Time Period 2**Brand Competencies*

Maintenance of brand's core competencies Percy Mark's continues in the traditions of 'exquisite craftsmanship' and careful selection of gemstones for designs, established by Percy Marks. The focus however is on succession and subsequently regaining control of the family firm. Thus, competencies are not extended or advanced.

Strengthens, extends and advances core brand competencies. Leverages the expertise of design leaders to establish a design brand competency. Advanced the brand's historically significant hospitality competency, raising the lodge's standards of service, dining and supportive service elements, to support a prestigious brand positioning. Recruitment, training and employee brand value alignment were significant.

Development and extension of corporate brand's competencies. Beagley strengthens the branding competency, established by Mr Gwynne in the 1990s and extends the competency to retail. In recruiting of Shane Hicks, who previously held the director and deputy General Manager positions at Jeans West, he further strengthens the firm's retailing expertise.

Brand Heritage

Issues relating to ownership threaten core value of family that underpins the brand's heritage. The firm is listed on the stock exchange in 1966. Kenneth Marks gains full family control of the business in 1985, recovering the family's heritage and core value to the brand's essence. Maintenance of the foundational heritage elements of service, craftsmanship and exceptional gemstones. Percy Mark's advertising uses historical references to convey constancy, emphasising the brand's heritage as a 'pioneer' for rare gemstones and the brand's heritage of expertise to convey constancy. Leaders respect the brand's heritage yet strategies are maintenance and recovery focused.

Advancement of brand heritage. Brand's positioning is elevated to convey the significance of the brand's heritage and exclusive offering to the corporate brand's identity. Design innovation, progressive approach to quality and hospitality - raises the brand's core values. Artefacts referenced the brand's cultural significance and rich heritage. Marketing communications are important brand storytelling avenues, propagating legends and myths that enhance the brand's authentic area. Heritage is used explicitly yet in a subtle and engaging way.

Re-centering of brand orientation on the Rodd and Gunn brand. The shift elevates the significance of Rodd and Gunn to corporate strategy. Rodd & Gunn's authentic essence is not overshadowed by the other brand in the company's portfolio, Logan, or over reliant on the umbrella retail brand, Outdoor Heritage. Rodd & Gunn's integrated retail marketing mix takes inspiration from the brand's heritage, explicitly referencing the brand's provenance and heritage competencies in the store's design. Consistent historical referencing in brand symbols, specifically the trademark pointer.

Brand Stewardship

Kenneth Mark's governance of the corporate brand is instrumental to the recovery of Percy Marks. He strongly managed and brand through a period of upheaval, maintaining marketing communications, reassuring stakeholders of the brand's stability through historical references in advertising) and protecting the brand's traditions. He took purposeful steps to regain control of the Percy Mark's brand and subsequently instated a family succession plan, ensuring to protect the brand's long-term value. Kenneth Marks positions the brand for a period of growth, increasing turnover 16% to \$10 million in the year 1992 to 1993 despite the recession.

Alex van Heeren purchased the lodge in 1984 spending several million in radically transforming the lodge into one of the finest lodges in the Southern hemisphere. He establishes standards governing quality and traditions of excellence in hospitality. His stewardship is foundational to the strength and progression of the prestigious lodge. He strategically retains classic elements of the lodge that have heritage significance while adjusting the formality of the lodge's service style, incorporating contemporary service elements that ensure that the lodge experience remains relevant with evolving social conventions.

Despite major and ongoing structural brand change, strong stewardship strengthens the Rodd & Gunn brand. From 2000 to 2006 Beagley progressively restructures the business and rebrands Outdoor Heritage stores as Rodd & Gunn flagships to reflect the firm's most valuable asset. In 2002 the company's head office, including Rodd and Gunn's sales, merchandising and marketing departments, from Auckland to Brisbane. In 2001 Beagley purchases 30% of Hellaby's subsidiary, restores the 'mature' brand to a profitable position in 2006 before acquiring the remainder of the Rodd & Gunn brand from Hellaby in 2006. His approach is progressive and innovative.

Brand Building and Brand Expansion 2000-2009

Major structural change characterised the period of 2000 to 2009 for Rodd & Gunn. In 2000 the investment company Hellaby Holdings, purchased 82% of Rodd & Gunn's holding company '*Specialty Brands*' providing the expertise, resources and capital to operationalise corporate brand expansions strategies (*New Zealand Herald*, 2000). Hellaby appoints Michael Beagley the Managing Director of Specialty Brands. His role is implementing a planned programme of building the strength of the Rodd & Gunn and Logan brands in the Australian market.

Beagley strengthens and extends Rodd & Gunn's **brand competencies**. His extensive retailing and managerial expertise bolsters the firm's skill base and underpins the progressive restructuring of the business. He establishes and develops a retailing competency making strategic appointments and relocating company operations. The appointment of seasoned retailer Shane Hicks and the relocation of the Outdoor Heritage head office to Brisbane along with Rodd & Gunn's sales, merchandise and marketing departments, supported a stronger focus on the company's retail performance in Australia. The retailing competency complimented the firm's branding competency, Gwynne established in the 90s.

Rodd & Gunn's **brand heritage** was strengthened and advanced. Beagley operationalised a strategic brand orientation, moving the focus of company strategy from the Outdoor Heritage retail brand to Rodd & Gunn. The shift elevated the Rodd & Gunn brand and its heritage in corporate decision-making processes. Rodd & Gunn's heritage inspired the corporate brand's contemporary personality and supportive marketing strategies. Rodd & Gunn's integrated marketing mix explicitly referenced the brand's provenance and heritage competencies. The retail flagship stores reminiscent of New Zealand hunting lodges, provided a platform for stakeholders to experience with the brand's outdoor heritage and strengthen the brand's authentic heritage. The trademarked pointer logo symbolically references the brand's heritage, acting as an arc of continuity in the brand's evolution.

Beagley's **stewardship** of the Rodd & Gunn corporate brand was instrumental to the advancement of the brand's heritage. From 2000 to 2006 Beagley implements and operationalises a brand-building program, progressively restructuring the business and rebranding Outdoor Heritage stores as Rodd & Gunn flagships to reflect the firm's most valuable asset. In 2002 he strategically shifts the company's head office, including Rodd & Gunn's sales, merchandising and marketing departments, from Auckland to Brisbane (*Inside Retailing*, 2006). Tactically, the move supported a stronger focus on the company's Australian retail performance, retail expansion and evaluation of future expansion opportunities.

Between 2003 and 2006, Rodd & Gunn opens a series of retail flagships in strategic Australian and New Zealand locations including Sydney and as part of the 'long-awaited opening' of the \$300 million Queen Street Plaza Mall (*Brisbane City News*, 2005). In 2001 Beagley purchases 30% of Hellaby's subsidiary, restores the 'mature' brand to a profitable position in 2006 before acquiring the remainder of the Rodd & Gunn brand from Hellaby in 2006 (*Inside Retailing*, 2006; *National Business Review*, 2001). He resigns from Hannah's denoting his central interest in Rodd & Gunn. His approach is progressive and innovative. The evidence demonstrated that Rodd & Gunn integrated the three pillars of brand competencies, brand heritage and brand stewardship.

6.10 SYNOPSIS OF FINAL 3 CASES

The three corporate heritage brands Percy Marks, the Huka Lodge and Rodd & Gunn confirm the significance of brand competencies, brand heritage and brand stewardship to corporate heritage brand management. The first period of each brand's narrative involved creating a foundation for the three pillars of brand competencies, brand heritage and brand stewardship. The second period in the narrative of the corporate heritage brands was characterised by major structural brand change involving brand refinement, brand building and brand expansion. Percy Marks placed greatest emphasis on protecting brand authenticity. For Percy Mark's regaining constancy of an authentic core was of principal brand governance concern in period 2.

Rodd & Gunn and the Huka Lodge were particularly strong managing brand paradox through relevance. Design innovation is a special form of innovation that was a

particularly important aspect of brand paradox management for the Huka Lodge. Leaders used design to ‘*celebrate*’ the brand’s heritage. The Huka Lodge’s unique interior was a platform for the delivery of an exclusive and ‘*unforgettable*’ experience (Nielsen, 2013). Leaders elevated the brand’s authentic heritage through design innovation. Design innovation was less obvious at Percy Marks.

6.11 CONCLUSION

The aim of Chapter 6 was to longitudinally examine the management of corporate brand heritage. This chapter draws on Chapters 4 and 5, extending insight into corporate heritage brands and their management in different contexts and across varying time dynamics. The chapter presents the findings from the historical archival component of Study 2. The chapter presents original research that addresses how management can protect and renew brand heritage.

An important contribution of Chapter 6 is the identification of the three pillars of corporate heritage brands. These are corporate brand heritage, corporate brand competencies and corporate brand stewardship. The findings evidence that brand heritage is a dynamic resource that through innovation leaders can strategically enhance and extend. Chapter 6 resolves the brand heritage paradox in the corporate heritage brand context. The resolution is through strategic brand management with specific attention to the advancement of brand heritage.

CHAPTER 7

DISCUSSION

CHAPTER 7

DISCUSSION

7.1 INTRODUCTION

The discussion focuses on synthesising and interpreting the findings from Study 1 and Study 2. The key issues that arose from the two Studies are integrated and presented in three parts: (1) protecting the heritage through ongoing brand heritage management, (2) brand heritage renewal and innovation and (3) brand heritage recovery. The discussion now examines these in context of the extant literature, namely that relating to corporate heritage, corporate heritage brands and corporate heritage brand management.

First the discussion addresses ongoing corporate heritage brand management in Section 7.2. The discussion in Section 7.3 centres on brand heritage renewal and innovation. Then in Section 7.4 the discussion focuses on failure and recovery, as these are the extremes that firms may experience. Then Section 7.5 discusses an integrated approach to corporate heritage brand management. Table 7.1 outlines the fundamental components of an integrated, strategic approach to corporate heritage brand management. Figure 7.1 synthesises the findings from Study 1 and Study 2. Finally, a short conclusion to the discussion presents in 7.6.

7.2 PROTECTING HERITAGE THROUGH ONGOING BRAND HERITAGE MANAGEMENT

The literature focuses on the nature, dimensions and pre-conditions of the concept of corporate heritage brands, but has been slower to articulate fully a framework for managing corporate heritage. Some papers have initiated an understanding of the managerial aspects of corporate heritage. Balmer (2009) is one of the more explicit papers dealing with the management of corporate heritage brands, including components such as continuity, visibility and strategy. Urde *et al* (2007) also touches on several critical management aspects, built around brand stewardship, including a sense of responsibility, long-term continuity and safeguarding the heritage brand. The special role of custodianship/stewardship as a management approach is also emphasised by Balmer (2011b). Finally, a fourth paper (Balmer, 2013) also emphasises the management aspect, especially his sixth corporate heritage criterion: unremitting

management tenacity. It is in this spirit that the current study has been formulated and presented.

Three pillars embody the key issues that arose from the case studies. The pillars provide insight into the management of corporate heritage by corporate heritage brands. The discussion now examines these in the context of the extant literature. A three-pillar framework for corporate heritage brand management is developed from the evidence, and is based on the three pillars of: brand essence formulation, brand continuity and brand protection. The newly devised framework draws inspiration from the aforementioned four seminal papers, and goes further using inferences from the case evidence to formulate the three pillars.

Previous research (Balmer, 2009) identifies heritage as a core constituent of the British Monarchy's corporate brand identity. Later, Balmer more explicitly (albeit conceptually) links corporate heritage with corporate brand identity. The current research establishes the significance of brand heritage to the brand identity of corporate heritage brands. As *Pillar 1* indicates, heritage is a substantial component of the brand essence in corporate heritage brands, but only a minor component in contemporary corporate brands.

Pillars 2 and *3*, confirm that continuity is critical to the perpetuation of corporate heritage brands. *Pillar 2* shows that corporate heritage brand continuity is achieved through a combination of brand consistency and brand constancy. *Pillar 3* indicates that brand protection for corporate heritage brands is achieved through a combination of brand architecture and brand standards. *Pillars 2*, and *3* have connections to the literature, but go further in terms of the identification of more detailed nuances, such as the difference between consistency and constancy, enabled by the study's research design, which compares brand heritage management across both corporate heritage and contemporary corporate brands. Together the three pillars represent a new conceptual framework for the management of brand heritage by corporate heritage brands.

Although each pillar contributes to understanding heritage management in corporate heritage brands, additional insight comes from the linkages between them. The three-component model of heritage brand management starts with the recognition of the

eminent role of corporate heritage in shaping the brand essence in corporate heritage brands. The super importance of heritage in such corporate brands may seem obvious, but the study provides convincing evidence from semi-structured interviews with corporate heritage brand managers. Reinforcing this base is the contrast with contemporary corporate brands where the emphasis on heritage is relatively small. To re-iterate, strong corporate heritage forms the foundation to the heritage management system of corporate heritage brands.

Building on their strong heritage foundations, corporate heritage brands go about heritage management in particular way. That is, they reinforce consistency and *constancy* in day-to-day corporate brand management, and they protect the corporate heritage brand through brand architecture and *brand standards*. What is especially critical and unique for corporate heritage brands is the emphasis on *constancy* and *brand standards*. Such corporate heritage brands go to greater lengths to be true to and safeguard their heritage. A British Marquis recently endorsed the meaningfulness of *constancy* and *brand standards* to maintaining his 400-year-old estate heritage (Cooper *et al* 2015b).

The pillars developed in this research project seem eminently sensible and true to the nature of corporate heritage brands. In many ways, the findings robustly support Balmer's (2013, p. 16) depiction of 'unremitting management tenacity'. However, the precise nuances differentiating brand heritage management processes across corporate heritage brands and contemporary corporate brands were apparently unreported prior to this study, because no known previous research compares the two types of brands in an empirically grounded way.

7.3 BRAND HERITAGE RENEWAL AND INNOVATION

Successful brands embrace change (Vallaster and de Chernatony, 2006). Heritage identities only remain meaningful if they embrace change (Balmer 2011b, 2013; Urde *et al* 2007). For example, Balmer (2009) analyses how the British Monarchy has balanced change and corporate brand continuity. The tension between change and constancy is a central paradox at the core of branding. The dominant empirical literature suggests that corporate heritage brands may be perceived as traditional rather than progressive. Thus, managing brand paradox is particularly challenging for corporate heritage brand types.

The literature discussing brand heritage paradox has two characteristics: it is primarily descriptive rather than empirical and it does not explicitly focus on corporate heritage brands. The few, who identify the unique challenges specific to corporate heritage brands in managing brand heritage paradox, include Urde *et al* (2007), Balmer (2011a, 2011b) and Burghausen and Balmer (2015). In one of the more explicit articles dealing with managing corporate heritage brands, Burghausen and Balmer (2015) suggest that a specific function of a brand steward, within the organisation, may be an effective way of moderating change and constancy.

The themes that arose from the case analyses are the role of an authentic core for corporate heritage brands; embracing change; maintaining relevance; and innovation and design innovation. The research now draws on the case evidence to resolve the corporate heritage brand paradox. The outcome is an integrated three-part approach to managing corporate heritage brand change. The three parts are:

- (1) Embracing change to maintain relevance
- (2) Innovating
- (3) Remaining true to the authentic core.

The discussion now examines each part in the context of the extant literature domains of brand paradox, corporate heritage brands and brand heritage management.

THREE-PART APPROACH TO CORPORATE BRAND CHANGE

Part 1: Embracing change to maintain relevance

Embracing change to maintain relevance is a fundamental aspect of brand paradox management and subsequently corporate heritage brand longevity. The evidence confirmed the importance of relevance and furthermore strategic change. Leaders managed the brand by constructing a relevant corporate heritage brand identity that appealed to contemporary stakeholders, and yet was consistent with the brand's authentic essence. Pioneers in the brand heritage and corporate heritage disciplines propose managing commitment to change through brand stewardship (Burghausen and Balmer, 2015; Hakala *et al* 2011; Urde *et al* 2007). The findings suggest that corporate heritage brands move beyond simply managing change because they actively embrace change. The extent of embracing change varied. However, the findings point to a

relationship between attitude to change and the successful management of brand paradox. Corporate heritage brands embracing change more strongly are more successful in resolving the paradox.

Part 2: Innovating

Innovating was also integral to the resolution of brand paradox. The findings demonstrate the significance of innovation and especially design innovation in resolving brand paradox. Innovation was a powerful tool that bridged constancy and change through the advancement of brand heritage. Literature, which addresses innovation and design innovation, is uncommon within the corporate heritage or brand heritage contexts. Instead, disparate research crosses various disciplines including design management (Borja de Mozota, 2003; Verganti, 2011), product innovation (Bloch, 2011; Giacosa, 2014; Moon *et al* 2013; Schreier *et al* 2012) and marketing (Hsu, 2011; Kapferer, 2012). One exception to consider design innovation and innovation management in a branding context is Borja de Mozota (2003), who identifies that integrating design into managerial and marketing strategies contributes to the brands value and company performance.

Design innovation was a special form of innovation and an important aspect in brand paradox management for all the cases. The literature concerning design innovation is emergent. However, empirical and conceptual papers clearly sense the need to maintain contemporary relevance and suggest that design innovation may be an important source of brand value (Montaña *et al* 2007). The findings provide empirical evidence that suggests relevance is integral, and demonstrates that innovation is a valuable tool in the corporate branding context. Design innovation can effectively leverage the brand's past, and concurrently construct a contemporary brand image. The case evidence supports the central role of innovation, especially design innovation in brand paradox management. Innovation was an important element of brand paradox management.

Part 3: Remaining true to the authentic core

In accordance with the corporate branding literature, the core played an important role in corporate heritage brand management. However, the evidence brought into greater focus the inherent symbolic and paradoxical dimensions, suggesting a refinement of the notion. Thus, the evidence supports a move from core to authentic core. The authentic

core encompasses the notions of organisational values, brand essence, brand promise, brand vision and brand heritage, and is of central importance in corporate heritage brand management. The authentic core was central to the management of brand paradox for corporate heritage brands.

The more comprehensive the understanding of the authentic core, the greater the corporate heritage brand's ability to manage change. Corporate heritage brands strengthened their authentic core through the strategic appropriation of brand heritage. For example, Tyrrell's appropriated brand heritage in a multiplicity of ways including retro labelling, anniversary celebrations and special releases. They also leveraged core areas of expertise and inherited knowledge. Heritage was foundational to the corporate heritage brand's contemporary identity, forming a defining dimension of their authentic core. One leader explained that the heritage has '*... a resonance...the heritage is what the brand is about*'; it is the '*DNA*' of the corporate brand imbuing a '*richness and a history that is trustworthy and recognisable*'.

Remaining true to an authentic core is a critical component of resolving brand paradox. The notion of an authentic core is particularly significant in the context of corporate heritage brands. Leaders refused to compromise the authentic core of the corporate heritage brand. Instead, they continually monitored the corporate heritage brand to ensure that all actions were consonant with the brand's authentic core. Remaining true to core brand values is a precondition of brand authenticity (Burghausen and Balmer, 2014b; Merrilees and Miller, 2008). Essentially, the brands' values and heritage were silent moderators of brand action, protecting the authenticity of brand essence. Core values and brand heritage are defining elements of a corporate heritage brand's authentic core. The core values of each corporate heritage brand moderated their brand strategies, conveying constancy and anchoring change through brand heritage.

Integrated corporate heritage brand management approach

An integrated, corporate heritage brand management approach to change is proposed as a framework for the resolution of brand paradox. The framework comprises three parts. Corporate heritage brands need to embrace change to maintain relevance (*Part 1*). Innovation especially design innovation is a powerful tool for corporate heritage brands, empowering leaders to establish brand relevance while enriching brand heritage (*Part*

2). Part 1 and 2 take the corporate heritage brand into the future, but in a way that they are still connected to heritage values. Remaining true to an authentic core (*Part 3*) remains an essential anchor to corporate heritage brand change. The integrated approach redresses the limited attempts to resolve the inherent paradox between brand heritage and innovation in the corporate heritage brand context. The approach to managing change explains how corporate heritage brands manage continuity and change, to enhance the corporate brand and its heritage by anchoring innovation in the brand's authentic core, thus resolving the brand paradox.

7.4 BRAND HERITAGE RECOVERY

The prevailing brand crisis literature has two major characteristics: short-term rather than long-term focus and examining brand recovery from a broader brand reputation perspective, rather than say a more nuanced brand identity perspective. Most of the literature suggests that issues like brand demise or brand decline are indeed long-term matters (Jevons *et al* 2007; Thomas and Kohli, 2009), but those scholars present conceptual rather than empirical frameworks. The dominant empirical literature is short-term in nature (Clarke, 2011; Rhee and Hadwick, 2011). Brands may well go through a lifecycle (Ewing *et al* 2009), but few systematic studies analyse the decline phase or the final failure stage. Conversely, while acknowledging the premature death of many iconic corporate brands, Thomas and Kohli (2009) offer (normative) suggestions for revitalising declining brands. Few studies examine iconic brands experiencing a long-term period of structural brand neglect, followed by major recovery of the brand. Study 1 addresses this gap in the literature by examining long-term brand management in the Tiffany and Burberry corporate heritage brands.

Both luxury firms experienced a defined period of brand decline, in which their corporate heritage was neglected. Both firms recovered from that situation, by recovering their corporate heritage. The evidence suggests both firms orchestrated a similar three-stage, corporate heritage brand recovery process, which follows a structural brand crisis: **Stage 1**: restoring the corporate brand vision; **Stage 2** reconnecting the corporate brand to its core brand values; and **Stage 3**: re-instating core brand capabilities.

The findings reveal the possibility of brand decline emphasised by Ewing *et al* (2009), Jevons *et al* (2007) and Thomas and Kohli (2009). Both Tiffany and Burberry experienced major, protracted brand difficulties. To an extent, the results support the notion that brand immortality is not a given and companies need to be vigilant, competent and innovative in dealing with challenges in the marketplace. In both firms, flawed management contributed to the brand crisis, in broad strategic marketing terms. By not understanding or managing the corporate heritage responsibly they undermine the corporate heritage brand's equity.

In terms of the Balmer (2013) corporate heritage marketing mix, the brand crisis in the two firms arises from neglected custodianship and underinvesting in the corporate heritage character (corporate identity traits). Conversely, the findings support Thomas and Kohli (2009) in that there can be life after near (brand) death. With the help of new management teams, and a re-energised approach to brand management (revitalised custodianship), both companies were transformed using corporate heritage brand recovery as the central recovery platform. The three-stage, corporate heritage brand recovery process, common to both firms, provides insight into how companies can restore corporate heritage in such circumstances.

Regaining the corporate heritage brand's vision (**Stage 1**) seems fundamental. Brand vision goes to the heart or character of brand or market positioning and is critical in a competitive environment to create and maintain a sustainable competitive advantage. In both cases, the companies had lost market share by lackluster brand positioning. Restoring the brand vision helped restore brand positioning. Importantly, revitalised brand vision and positioning helped drive all brand value components and guide the development of necessary brand capabilities.

Reconnecting the brand with its core values (**Stage 2**) is also very important. The core brand values are closely allied to the brand vision and positioning. Expressed differently, the core brand values are the essence of the corporate heritage brand. Although the brand values are intertwined and mutually support the brand positioning, from a practical viewpoint each must be given individual management attention in rebuilding and reconnecting to the brand. For each company, Study 1 has explained how each core value was rebuilt and reconnected to the corporate heritage brand.

This discussion of **Stages 1 and 2** highlights lessons for any luxury company wishing to restore corporate heritage following a prolonged brand crisis. Combining the two stages, suggests that effective branding requires hard work in developing a strong, powerful brand vision, and supporting core brand values. Strategic brand management skills are relevant for this task, as shown in the findings. Brand management skills are also particularly relevant for **Stage 3**, to which we now turn.

Rebuilding appropriate brand capabilities (**Stage 3**) completes the three-stage, corporate heritage brand recovery process. The relevant brand capabilities are unique to each firm. Product development and promotion, in general, are common to both firms. The remaining capabilities usually reflect various retail-marketing capabilities, such as visual merchandising, not surprisingly, because both companies are retailers. Whereas **Stages 1 and 2** require *strategic* brand management skills, conceivably **Stage 3** requires more *functional* brand management skills.

Study 1 offers a holistic, three-stage, corporate heritage brand recovery-framework. The findings and discussion highlight the importance of a broad conceptual framework to guide corporate heritage brand recovery, with the most critical concepts being corporate brand vision, core brand values and core brand capabilities. Further, the discussion highlights the necessary role of both strategic and functional brand management skills to execute successfully such a framework in practice.

7.5 AN INTEGRATED APPROACH TO CORPORATE HERITAGE BRAND MANAGEMENT

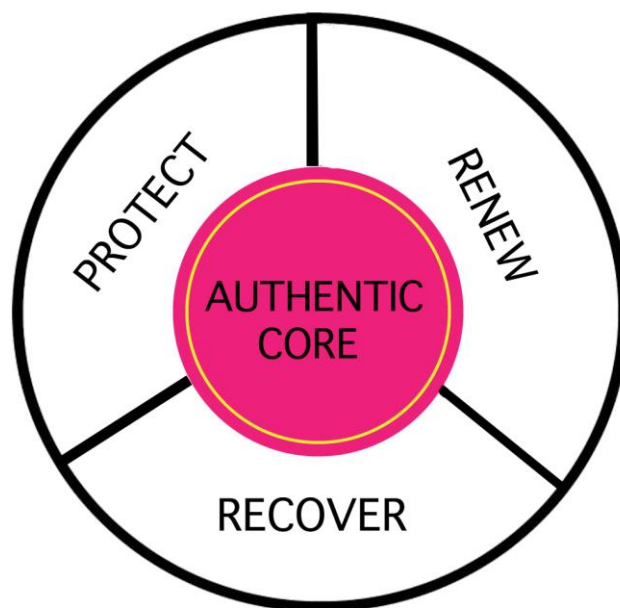
The management of corporate brand heritage has strategic significance. Corporate heritage brand management is an emerging concept and distinct conceptual category yet only a few studies focus on corporate heritage brands (Cooper *et al* 2015a, 2015b; Hudson and Balmer, 2013; Urde *et al* 2007). Thus pioneers of the field necessitate further empirical research. The longitudinal and systematic Study of 12 corporate heritage brands provides explanatory insight into the protection and renewal of corporate brand heritage. As Table 7.1 shows, protecting, renewing and recovering the brand all require an integrated strategic brand management approach. Together the principles for protecting, developing and recovering brands represent an integrated approach to corporate heritage brand management.

TABLE 7.1 INTEGRATED STRATEGIC BRAND MANAGEMENT APPROACH

| | Importance of Integrated Management | Custodianship | Brand Competencies |
|-----------------------------|--|----------------------|---------------------------|
| <i>Protecting the Brand</i> | ✓ | ✓ | ✓ |
| <i>Renewing the Brand</i> | ✓ | ✓ | ✓ |
| <i>Recovering the Brand</i> | ✓ | ✓ | ✓ |

As Figure 7.1 shows, integrated corporate heritage brand management involves protecting, renewing and recovering aspects of the corporate heritage brand. The concurrent management of each, is central to the perpetuation of a corporate heritage brand’s authentic core and fundamental to the strategic brand management approach.

FIGURE 7.1 INTEGRATED CORPORATE HERITAGE BRAND MANAGEMENT



7.6 CONCLUSION

Case evidence and analysis were used to develop a framework for understanding corporate heritage brand management. A synthesis of the findings resulted in an integrated approach to corporate heritage brand management that addresses protecting and developing corporate heritage brands. A three-pillar framework of brand essence formulation, brand continuity and brand protection, provides explicit guidance for the long-term protection of corporate heritage brands. The findings also produce a three-part approach that addresses how corporate heritage brand management can renew corporate brand heritage.

The three-part approach to corporate brand change entails (1) embracing change to maintain relevance, (2) innovating and (3) remaining true to the authentic core. Finally a three-stage brand heritage recovery process (Study 1) how corporate heritage brand management save the corporate heritage brand in the event of a structural brand crisis through the recovery of corporate brand heritage. **Stage 1** involves restoring the corporate brand vision; **Stage 2** reconnecting the corporate brand to its core brand values; and **Stage 3** re-instating core brand capabilities.

The findings also produce an integrated approach to corporate heritage brand management that encompasses protection, renewal and recovery. The integrated approach is significant to the successful management of corporate heritage brands over time. Together the findings from Study 1 and Study 2 provide directive insight for the protection, renewal and recovery of corporate heritage brands.

CHAPTER 8
CONCLUSION

CHAPTER 8

CONCLUSION

8.1 INTRODUCTION

The question, which the research addressed, is *how can corporate heritage brand management protect and renew brand heritage?* Following a critical analysis of the extant literature, two separate studies were designed and executed to investigate how corporate heritage brand management protects and renews brand heritage. The evidence and analyses contributes [to](#) branding theory and practice.

Section 8.2 outlines the research approach. Next [Section 8.3](#) reiterates the fundamental research findings. Section 8.4 explains the inherent limitations of the research approach. Next the theoretical contributions of the research are discussed (Section 8.5). Then the practical implications of the research are explained (Sections 8.6 and 8.7). A discussion of the methodological contributions of the research (Section 8.8) is followed by an outline of the opportunities for future studies. The concluding section reiterates the importance of strategic corporate heritage brand management.

8.2 RESEARCH APPROACH

To address the research question of ‘*how can corporate heritage brand management protect and renew brand heritage?*’ the research comprised two discrete studies. The aim of Study 1 was to examine how luxury organisations manage corporate heritage to recover and enhance the corporate heritage brand. The approach was a longitudinal, historical examination of two iconic corporate heritage brands: Tiffany & Co. and Burberry.

Study 2 examined how effective corporate heritage brand management can protect and renew brand heritage. The approach was comparative, juxtaposing the brand heritage management practices of five corporate heritage brands with those of five contemporary corporate brands. The two distinct approaches were (i) semi-structured interviews with senior brand managers and (ii) historical research. Each method was applied to ten cases.

8.3 RESEARCH FINDINGS

Study 1 examined how two luxury organisations managed corporate heritage to recover and enhance the corporate brand. The longitudinal, retrospective study focused on two corporate heritage brands, Tiffany & Co. and Burberry, which experienced structural corporate heritage brand decline, followed by recovery, and demonstrates how long-established corporate heritage brands can overcome a structural brand crisis, by restoring corporate heritage. Three brand constructs underpinned the restoration of corporate brand heritage and recovery of the corporate heritage brands, namely *brand vision*, *brand values* and *core brand competencies*.

Study 2 examined how corporate heritage brand management protects and renews brand heritage in a corporate branding context. A central finding of Study 2 was the identification of several differences between corporate heritage brands and contemporary corporate brands. For corporate heritage brands, corporate heritage was of greater significance than personality to the brand's essence; conversely, for contemporary corporate brands, personality was of greater significance than heritage to the brand's essence. In terms of brand protection, corporate heritage brands went further than the contemporary corporate brands, emphasising constancy over consistency and standards.

8.4 LIMITATIONS

The analysis of Study 1 is limited by the access to relevant historical information. Understandably gaps are often prevalent in archival material. By their nature, documents are susceptible to environmental damage and selective preservation. Archival collections can be fragmented, and in many instances stored across various locations.

Further, one should not infer that corporate heritage brand recovery is sufficient to restore the prosperity of a corporate heritage brand in crisis. It is likely that a raft of supporting policies and programs facilitate the recovery process. Two corporate brands are not enough to be confident about the three-stage, corporate heritage brand recovery framework. More corporate heritage brands require study to assure the veracity of the three-stage framework.

Study 2 is confined to Australasia and five industries. The corporate heritage brands in Study 2 offer evidence supporting the resolution of brand paradox through strategic corporate brand management. However, studies could both substantiate and extend the newly proposed framework of corporate heritage brand management in other industries and other countries.

8.5 THEORETICAL CONTRIBUTIONS

The research contributes to the extant literature by emphasising the brand management aspects of corporate heritage. Case evidence and analysis from two separate studies were used to develop an integrated approach to corporate heritage brand management that addresses the protection, development and recovery of corporate brand heritage. The research makes four major theoretical contributions.

A framework for corporate heritage brand management

The first theoretical contribution is the four proposition framework of corporate heritage brand management (Table 8.1). The corporate heritage brand management framework captures the managerial practices that distinguish corporate heritage brands from contemporary corporate brands. It contributes to the literature with a structured approach to managing corporate heritage brands and brand heritage. Although previous literature (Balmer, 2013) highlighted the potential need for unremitting management tenacity, the current study goes further with structured evidence from multiple case studies and by identifying differential nuances that hitherto have not been discerned for the management of corporate heritage brands. The nuances are the special emphasis on:

- *brand constancy;*
- *brand standards;*
- *and, tighter renewal boundaries.*

More generally, corporate heritage brands are more zealous and tenacious in safeguarding their brand heritage, using both brand architecture and *brand standards*. Further, corporate heritage brands *impose tighter renewal boundaries*. The research extends the literature by emphasising the management aspects of corporate heritage. The corporate heritage brand management framework provides a systematic approach to corporate heritage brand management that addresses the four elements of brand essence

creation, brand continuity, brand protection and brand renewal. Each part represents an actionable principle. The corporate heritage brand management framework gives greater structure to an aspect of the literature that was previously conceptual.

TABLE 8.1 CORPORATE HERITAGE BRAND MANAGEMENT PROPOSITIONS

Corporate Heritage Brand Management Propositions

| | |
|----------------------|---|
| Proposition 1 | <i>For corporate heritage brands, heritage is of greater significance than personality to the brand's essence; for contemporary corporate brands, personality is of greater significance than heritage to the brand's essence.</i> |
| Proposition 2 | <i>Contemporary corporate brands approach brand continuity primarily through consistency; corporate heritage brands have consistency and go further to insist on constancy (clarity of identity and protection of inheritance).</i> |
| Proposition 3 | <i>Corporate heritage brands approach brand protection in terms of standards, while contemporary brands emphasise design architecture and take a more active approach through reinforcing.</i> |
| Proposition 4 | <i>Brand renewal has boundaries, and subsequently varies in scope between corporate heritage brands and contemporary brands.</i> |

Drawn from Table 5.2

The first contribution is relative to the corporate heritage brand literature. The literature focuses on the nature, dimensions and preconditions of corporate heritage brands, but has been slower to articulate fully a framework for managing corporate brand heritage. A few papers have initiated an understanding of the managerial aspects of corporate brand heritage. Balmer (2009) is one of the more explicit papers dealing with the management of corporate heritage brands, including components such as continuity, visibility and strategy. Urde *et al* (2007) also touch on several critical management aspects, built around brand stewardship, including a sense of responsibility, long-term continuity and safeguarding the brand's heritage.

The research clearly builds on the literature, which is about the concept of corporate brand heritage, contributing the **four proposition framework of corporate heritage brand management** that clarifies how corporate heritage brands are different to contemporary corporate brands. The research confirms the significance of brand essence, continuity and relevance to the identity and management of corporate heritage brands. However, it goes further by identifying how to manage these elements over time. For example, continuity for corporate heritage brands is comprised of consistency and constancy, reinforcing the strategic approach corporate heritage brands require. The research moves beyond the basic identity elements of corporate heritage brands to contribute specific practices that protect and perpetuate corporate heritage brands. The research provides theoretical guidance for strategically managing corporate heritage brands over time.

An emphasis on custodianship

The second theoretical contribution is demonstrating how brand management protects corporate brand heritage through an emphasis on custodianship. The research demonstrates the significance of purposeful brand protection to the longevity of corporate heritage brands and the management of their unique heritage based brand equities. In highlight the special role of custodianship in the recovery, protection and renewal of corporate heritage, the research extends the corporate heritage brand management literature. Brand protection as part of an integrated corporate heritage brand management approach involves progressing the brand in a way that is constant with a brand's heritage, rather than legalistic adherence to a set of archaic values. The research advances clarity in the corporate heritage-branding domain, identifying specific practices that protect corporate brands and corporate brand heritage.

The second contribution is relative to two sets of literature. The first set of literature in the corporate heritage brand domain, focuses on the value and application of brand heritage in a corporate branding context. While the defining dimensions and characteristics of corporate heritage brands have been discussed (Balmer 2011b, 2013; Urde *et al* 2007), specific practices that protect corporate brand heritage without compromising the brand's current salience seem unclear. The second set, the corporate heritage brand management literature is embryonic and corporate heritage brand management practices 'remain to a large degree, underspecified' (Burghausen and

Balmer, 2015, p. 26). Scholars have readily identified that corporate heritage brands require a specialised approach (Burghausen and Balmer, 2015; Hudson, 2011; Urde and Greyser, 2015). The special role of custodianship/stewardship as a management approach is emphasised by Balmer (2011b). A second paper (Balmer, 2013) also emphasises the management aspect, especially his sixth corporate heritage criterion: unremitting management tenacity. Burghausen and Balmer (2015) extend earlier conceptualisations identifying awareness of brand heritage and a focus on continuity as important managerial dimensions affecting the enactment of a brand's heritage identity. Until recently, implications for the management of the unique corporate brand type have been drawn from a limited pool of empirical case studies.

The research confirms the significance of strategic management to the protection and perpetuation of corporate heritage brands. However, it is more elaborate and expansive, providing a detailed account of how protecting the corporate brand. The strategic approach, which this research advocates, extends beyond the traditional stewardship concerns of uncovering and activating brand heritage in an organisational context.

Resolving the tension between brand heritage and innovation

A **third theoretical contribution** is resolving the tension between heritage and innovation, explaining how to manage continuity and change to enhance the corporate brand and its heritage. The relationship between continuity and change represents a core branding paradox. The management of the paradox is especially challenging and complex in the context of corporate heritage brands.

A further contribution is the identification of the need to embrace change, evident in all of the corporate heritage brands. Building on that change platform, an integrated, three-part framework for managing the corporate heritage brand paradox is developed:

- 1) embracing change to maintain relevance;
- 2) innovating, especially using design innovation;
- 3) remaining true to the authentic core.

Parts 1 and 2 take the brand into the future, but always connected in some way to heritage values. Part 3, *remaining true to the authentic core*, anchors the corporate heritage brand to the past, present and future, and thus resolves the paradox. The three-

part approach to brand change provides a systematic, theoretically grounded framework for managing change in the context of corporate heritage brands.

By introducing the notion of an authentic core and its significance to corporate heritage brands, the research adds to the emergent corporate heritage brand literature. While contemporary corporate brands approach the development of a core functionally, the symbolic dimension was of central and absolute importance for corporate heritage brands. The distinction highlights the difference between functional core and authentic core. The authentic core is significant in the context of corporate heritage brands. The management of the authentic core underpins the relevance and continuity of corporate heritage brands.

This contribution is relevant to two areas of literature. The first is the discussion of brand paradox in the corporate branding literature. Several scholars have brought attention to the paradox of staying the same but changing. However research is fragmented across various sub-literatures that include corporate rebranding (Merrilees and Miller, 2008), brand authenticity (Alexander, 2009; Beverland, 2005b, 2006) and corporate brand management (Gyrd-Jones *et al* 2013). However, brand paradox is only discussed in passing, none have empirically investigated the phenomena or its management.

The second set of literature discusses the paradox of continuity and change in the context of corporate heritage brands. A number of scholars regard the management of constancy and change as a vital part of successfully managing corporate heritage brands (Balmer 2011a, 2011b; Hudson, 2011; Urde *et al* 2007), reinforcing the need to address brand paradox. Urde and Greyser (2015) suggest that maintaining links to tradition is significant to brand continuity, while Balmer (2011a, 2011b) that the brand's stakeholders can aid in moderating relevance. In one of the more explicit articles dealing with managing corporate heritage brands, Burghausen and Balmer (2015) suggest that a specific function of a brand steward, within the organisation, may be an effective way of moderating change and constancy. However, the tension of continuity and change in the context of corporate heritage brands remains unresolved.

The research presents a structured approach to managing change in the context of

corporate heritage brands that addresses the tension, resolving the brand heritage paradox. The resolution is through strategic brand management with specific attention to the advancement of brand heritage.

A framework for recovering corporate heritage brands

The fourth theoretical contribution is a framework for recovering corporate heritage brands. The three-stage framework is a grounded, theoretical contribution. The research demonstrates how long-established corporate heritage brands can overcome a structural brand crisis, by restoring corporate heritage. The research offers a holistic, three-stage, corporate heritage brand recovery framework. The framework is a guide for corporate heritage brand recovery utilising the three key concepts: *corporate brand vision*, *core brand values*, and *core brand capabilities*. The research goes further than other corporate heritage brand research in highlighting the special role of core competences as instrumental in the recovery of corporate brand heritage. The corporate heritage brand recovery framework addresses the need for a theoretically grounded and systematic approach to managing the long-term health of corporate heritage brands.

The fourth contribution is relevant to three sets of literature, luxury corporate brands, brand crisis and brand heritage. The first set, the luxury corporate brand literature, focuses primarily on defining the concept and measuring consumer perceptions of luxury (Beverland and Luxton, 2005; Christodoulides *et al* 2009; Kapferer and Bastien, 2009). Moore and Birtwistle's (2005) examination of the creation of a luxury fashion brand represents one of the more explicit studies of luxury that adopts a branding perspective. In turn the brand crisis literature is characterised by a short-term rather than long-term focus and is examined from a reputation rather than identity perspective. Finally, the brand heritage literature is emergent. Consequently, the foci have been conceptualising and identifying the implications of brand heritage. Urde *et al* (2007) determined that uncovering, activating and leveraging corporate brand heritage enhances organisational success, while Urde and Greyser (2015) have examined brand heritage as part of a corporate brand's identity. However, how to manage corporate brand heritage in the long-term is ambiguous. Further, the role of brand heritage in corporate brand recovery is unclear.

The research contributes to each of the three literature areas with a holistic, three-stage, corporate heritage brand recovery framework. The research encourages brand leadership that corporate brand heritage is recoverable following a brand crisis. Indeed, through corporate heritage brand recovery, brand management can recover and subsequently strengthen corporate brand heritage. A crisis situation represents an opportunity to address fault lines in the brand's structure and strategy. Swift action, communication and stakeholder support, underpin successful operationalisation of a recovery strategy.

8.6 PRACTICAL IMPLICATIONS: CORPORATE HERITAGE BRAND GUIDELINES FOR PROTECTING CORPORATE HERITAGE BRANDS

Following on from the discussion explicit guidelines for protecting corporate heritage brands are developed (Table 8.2). The three guidelines provide strategic direction for the management of brand paradox in the context of corporate heritage brands. The first two guidelines concern protecting the authentic core. The third guideline relates to progressing the core and/or periphery of a corporate heritage brand. Custodians could come to terms with what brand constancy means to their brand and its application in practice to maintaining brand continuity, as support to brand consistency measures.

TABLE 8.2 CORPORATE HERITAGE BRAND GUIDELINES FOR PROTECTING CORPORATE HERITAGE BRANDS

| Corporate Heritage Brand Guidelines | |
|--|---------------------------------------|
| <i>Brand Guideline 1:</i> | <i>An emphasis on brand constancy</i> |
| <i>Brand Guideline 2:</i> | <i>An emphasis on brand standards</i> |
| <i>Brand Guideline 3:</i> | <i>A need for brand renewal</i> |

Additionally, given the importance of brand protection in a brand stewardship role, custodians can comprehend what options they have. In part, the modern method of brand architecture can be borrowed from current brand management knowledge. However, custodians of corporate heritage brands need to go further and define what *brand standards* are applicable to their brand. Corporate heritage brand custodians should appreciate that they have permission to renew their brand; indeed, it is an obligation to do so. Notwithstanding, such brand renewal needs to be undertaken purposefully and cautiously.

Brand Guideline 1: An emphasis on brand constancy

The first guideline is that continuity of the authentic core requires an emphasis on constancy. Corporate heritage brands need to go beyond consistency, by demonstrating constancy. Corporate heritage brands are absolute in how they approach brand identity, and core brand values. Decisions need to be made confidently. To illustrate, the menswear retailer, Rodd & Gunn's brand was '*...underpinned by a strong sense of self and faithfulness to the brand's core*' ideals. Their '*constant*' approach to managing brand identity strengthened the brand's authentic core. Further, their leaders refused to incorporate inferior quality materials into products; such a practice would compromise the brand's integrity and undermine its core values. Overall, remaining faithful to a corporate heritage brand's values can strengthen the authentic core.

Brand Guideline 2: Emphasis on brand standards

The second guideline is that protecting and remaining true to the authentic core requires an emphasis on brand standards. Leaders must be resolute in their approach to the brand's authentic core. The standards of each corporate heritage brand should support historical continuity. Standards must apply to all aspects of the corporate heritage brand including the product, service, quality, communications and visual identity.

Although some standards are primarily tacit, encompassing the brand's conduct and values, others, especially those related to quality, are absolute. The inflexible nature of these standards is an important protective mechanism. To illustrate, one leader explained that what '*we are today*' is because of '*everything that we've done in the past...the brand has this iconic status and there's a great sense of ownership...so not*

letting our standards down...and being unrelenting' in regards to those standards was 'very important' to the brand's authentic core.

Brand Guideline 3: Need for brand renewal

The third guideline is the need to manage brand renewal. Leaders can act to strengthen and refine the corporate heritage brand. For instance, Rodd & Gunn's leadership team continually laboured to improve the fundamental aspects of the corporate heritage brand, especially quality. Innovation can be important for developing brand heritage, especially innovations which enhance organisational intelligence, extend defining areas of expertise and enrich the brand story.

Each generation of leadership has the responsibility to make a powerful contribution to the corporate heritage brand, drawing upon past lessons, challenging internal prejudices and reinterpreting their inheritance to advance the brand's legacy (Cooper *et al* 2015b). For example, Bruce Tyrrell pioneered the Semillon grape varietal in Australia. His son is placing a greater emphasis on the brand's heritage, returning to traditional equipment and techniques, and reapplying traditional techniques in innovative ways and divergent contexts. He explains, *'If you've got these resources why not have a bit of fun with it at the same time and try and create something people are going to be talking about in 50 years' time...it is a really exciting time'*.

8.7 FURTHER PRACTICAL IMPLICATIONS

The detailed nuances advanced in the current study should assist the custodians of corporate heritage brands. The primacy of heritage as a component is probably already understood and remains paramount. Corporate heritage brands require a specific management approach and this research offers a dynamic approach to brand heritage management. In addressing how to develop brand heritage, the research resolves the paradox at the core of corporate heritage brand management with a three-part framework that empowers corporate heritage brand managers to resolve the tension between innovation and heritage.

The three-part framework for managing the paradox provides broad guidance to brand managers: (1) embracing change; (2) innovating; and (3) remaining true to the authentic

core. The three specific brand guidelines for managing the paradox, which offer additional practical help, but based on robust theoretical understanding. The resolution is through strategic brand management framework with specific guidelines that emphasise the advancement of brand heritage.

Remaining true to an authentic core

Part one remaining true to an authentic core, equates with constancy. However, constancy is not the absence of change but rather strategically enacting change that enhances the brand's authentic essence. The corporate brands **remain constant at the core** through an *unwavering commitment* and absolutist expression of the cornerstone values, yet give the illusion of change to attain relevance by making marginal adjustments and peripheral modifications, to effectively manage the paradoxical relationship between constancy and change.

Maintaining relevance

Part two, maintaining relevance, can be approached in several ways. A brand audit is one effective way of identifying elements of the brand that require rejuvenation. Brand managers have permission to renew the brand. Developing the brand's capability of reflexivity especially on the level of the organisation's culture, supports brand relevance over time. Paspaley actively looks '*for new ways to improve*' the brand's '*overall proposition*'.

Innovating

Part three, innovating is a strategic approach to renewal that advances brand heritage and enhances brand image. Brand management by developing an organisation's cognitive creativity, through investments in controlled and divergent forms of creativity could improve the quality of creative outputs. Integrating the management of brand paradox into brand governance is a strategy for long-term corporate heritage brand management.

8.8 METHODOLOGICAL CONTRIBUTIONS

This research applied mixed methods and provides an example of a unique methodological approach. The approach, which combines longitudinal historical

analysis with interviews, produces a depth of nuanced data, valuable when the purpose of the research is theory building. The benefits of such an approach include that it ensures data integrity and produces a robust empirical outcome. The application of the methodological approach in different contexts represents an exciting opportunity.

8.9 FUTURE RESEARCH

The study focused on two countries so future research could investigate the phenomenon in other countries, especially those in the Northern Hemisphere. Future research could examine other companies to test for a generalised pattern to the three-stage, corporate heritage brand recovery process. The findings and discussion point to three central concepts that could usefully serve the *primary* focus of future research: custodianship, competencies and culture. In addition, the social implications of the study could be further examined in the not-for-profit context.

Custodianship is a key remedy in corporate heritage brand demise and recovery, respectively. Previous research has given conceptual attention to corporate heritage brand custodianship (Balmer, 2011a, 2011b; 2012a, 2013; Balmer *et al* 2006, especially 153-154; also see Capon *et al* 2001). A future empirical research project could be *dedicated* to custodianship and related governance procedures in corporate heritage brands. Similarly, competencies are also worthy of a *dedicated* empirical study (Balmer, 2013). The cultural component of corporate brand heritage would also be a challenging and thought-provoking avenue for future research (Hakala *et al* 2011).

8.10 FINAL CONCLUSION

How can corporate heritage brand management protect and renew brand heritage?

The overall aim of the research was to investigate how corporate heritage brand management protects and renews corporate brand heritage. The specific aims of the research, were to (1) investigate how corporate heritage brand management recovers the corporate heritage brand after a crisis (2) examine how corporate heritage brand management protects the corporate heritage brand and (3) how corporate heritage brand management renews the corporate heritage brand.

TABLE 8.3 SUMMARY OF MAJOR THEORETICAL CONTRIBUTIONS

| Major Theoretical Contributions | |
|--|--|
| <i>Contribution 1</i> | <i>The four proposition framework for corporate heritage brand management</i> (Table 8.1) <p>Proposition 1: <i>For corporate heritage brands, heritage is of greater significance than personality to the brand's essence; for contemporary corporate brands, personality is of greater significance than heritage to the brand's essence.</i></p> <p>Proposition 2: <i>Contemporary corporate brands approach brand continuity primarily through consistency; corporate heritage brands have consistency and go further to insist on constancy (clarity of identity and protection of inheritance).</i></p> <p>Proposition 3: <i>Corporate heritage brands approach brand protection in terms of standards, while contemporary brands emphasise design architecture and take a more active approach through reinforcing</i></p> <p>Proposition 4: <i>Brand renewal has boundaries, and subsequently varies in scope between corporate heritage brands and contemporary brands</i></p> |
| <i>Contribution 2</i> | <i>An emphasis on custodianship</i> Demonstrates how corporate brand management protects corporate brand heritage through an emphasis on custodianship. |
| <i>Contribution 3</i> | <i>A three-part framework that resolves the tension between brand heritage and innovation</i> <ol style="list-style-type: none">1. Embracing change to maintain relevance;2. Innovating, especially using design innovation;3. Remaining true to the authentic core. |
| <i>Contribution 4</i> | <i>A framework for recovering corporate heritage brands</i> A guide for corporate heritage brand recovery using the three key concepts: <i>corporate brand vision</i> ; <i>core brand values</i> ; and <i>core brand capabilities</i> . |

The research involved two distinct studies. Study 1 longitudinally examined two iconic corporate heritage brands highlighting how corporate heritage can affect the endurance of corporate heritage brands. The analysis of the Tiffany and Burberry luxury brands demonstrates how corporate heritage can be lost and then restored. Study 2 used historical research and semi-structured interviews with senior brand managers, from five corporate heritage brands and five contemporary corporate brands. The mixed methods approach produced robust empirical outcomes.

Table 8.3 summarises the four major contributions. First, the four-proposition framework of corporate heritage brand management addresses brand essence creation, brand continuity, brand protection and brand renewal. Second, the research demonstrates how brand management protects corporate brand heritage through an emphasis on custodianship. Third, the research resolves the tension between heritage and innovation, explaining how to manage continuity and change to enhance the corporate brand and its heritage. Finally, a three-stage, corporate heritage brand recovery process is developed, one that utilises the concepts of *corporate brand vision*, *core brand values* and *core brand capabilities*.

The challenge of how corporate heritage brand management protects and renews brand heritage has been robustly addressed through multiple studies across six industries. The strategic approach to corporate heritage brand management empowers brand leaders to manage the brand systematically, yet creatively, to ensure its legacy.

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APPENDICES

APPENDIX 1

ETHICS APPROVAL

GRIFFITH UNIVERSITY HUMAN RESEARCH ETHICS COMMITTEE

Dear Miss Cooper

I write further to your application for ethical clearance for your project "NR:Creating sustainable corporate brands" (GU Ref No: MKT/06/10/HREC). This project has been considered by Human Expedited Review 1.

The Chair resolved to grant this project ethical clearance.

This decision was made on 12-May-10. The ethical clearance for this protocol runs from 12-May-10 to 31-Mar-12.

Please refer to the attached sheet for the standard conditions of ethical clearance at Griffith University, as well as responses to questions commonly posed by researchers.

Regards

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APPENDIX 2

INTERVIEW PROTOCOL

ONGOING BRAND MAINTENANCE PRACTICES

I would like to start by asking you to tell me about the essence of the corporate brand?

What are some of the special things you do to protect the essence of the corporate brand?

Now just looking more broadly, what do you do to maintain the corporate brand's long-term viability?

What else is important to the ongoing strength of the corporate brand?

BRAND REVIEW

How often do you review the corporate brand?

Can we talk about one of the review processes you went through...

What was the outcome of the review for the corporate brand?

What levels of staff were involved?

BRAND RENEWAL

How do you continue to build the corporate brand?

How do you make the corporate brand relevant to consumers?

Why is the brand's heritage important to the corporate brand today?

How do you make the brand's history relevant?

How do you use the brand's heritage?

What beliefs of the past are important to the Huka Lodge today?

BRAND LEADERSHIP

In question one you mentioned some of your ongoing day to day brand maintenance practices what do you see as the role of the leadership team in those practices?

How does the senior leadership team motivate employees to live the corporate brand?

What is your role as a leader in ensuring the corporate brand stays relevant to its stakeholders?

I am now giving/showing you three cards (Blue: Strong contemporary management of the brand, Green: Brand steward responsibility towards protecting the brand, Orange: Brand custodianship strongly preserving traditions almost obsessively) which reflect the way you see your role as a leader in terms of the brand. Which card is nearest to the way you see your style of leadership?

What role does your leadership have in managing the relationship between continuity and adaptability?

How does the leadership team contribute to the brand's ongoing success?

How does your leadership personally contribute to the brand's ongoing success?

CONCLUSION

Is there anything else you would like to add about maintaining and renewing the corporate brand?

APPENDIX 3

PROTOCOL FOR HISTORICAL DATA COLLECTION

| Process | Elaboration |
|---|--|
| <i>Selecting appropriate archives</i> | Archival records may be 'located within firms or businesses organizations like employer (industry) associations' (Miller, 2006, p. 49). Others may be located in 'public collections such as national archive, collections, museums, galleries, libraries and university collections' (Miller, 2006, p. 49). Some archives may be easy to locate others yet others more obscure (Miller, 2006). In some instances, companies may be unaware that the archive exists (Welch, 2000). If data cannot be accessed 'relevant information may be available elsewhere' such as 'in the records of former managers, suppliers, customers and intermediaries' or specialist institutions (Welch, 2000, p. 204). |
| <i>Locating archival evidence</i> | Search and organisation of evidence into different analytic categories (Neuman, 2006). |
| <i>Evaluating quality of evidence in relation to the research</i> | Iterative questioning of the data, specifically (1) How relevant is the evidence to emerging concepts? (2) How accurate and strong is the evidence? Further, the following features of the evidence require consideration (1) The implicit conceptual framework. (2) Distinct details and (3) Factual statements on which there is agreement (Neuman, 2006, p. 429). |
| <i>Organising evidence</i> | In the process of gathering and locating new sources of evidence the data will be iteratively organised. This process of organising evidence involves recording themes in my notes to which I will later assign significance (Neuman, 2006). However, as theoretical insights emerge this may 'stimulate new ways to organize the data and for new questions to ask of evidence' (Neuman, 2006, p. 429). |
| <i>Synthesising evidence</i> | Iterative process of refining concepts moving toward 'a general explanatory model' (Neuman, 2006, p. 429). |
| <i>Writing</i> | The final process involves writing up the analysis drawn from the research. |

