

Corporate heritage identity management and the multi-modal implementation of a corporate heritage identity

Mario Burghausen¹, and John M. T. Balmer²

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¹ Dr Mario Burghausen is Lecturer in Marketing at Essex Business School, University of Essex, Colchester, UK, email: mburgh@essex.ac.uk.

² Prof John M.T. Balmer is Professor of Corporate Marketing at Brunel Business School, Brunel University, London, UK, email: john.balmer@brunel.ac.uk.

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Abstract

The purpose of this article is to advance the theoretical and instrumental understanding of corporate heritage identities. The empirical and exploratory study focuses on both the nature and the relevance of corporate heritage identity as apprehended and appropriated by managers for corporate identity management purposes. The research is undertaken within Britain's oldest brewery – one of the oldest corporate entities in Great Britain with a provenance spanning many centuries – and utilizes a qualitative and theory building case study. The research reveals two classes of management responsibilities vis-à-vis corporate heritage identity management, namely corporate heritage management activities and corporate heritage implementation strategies, which follow a particular corporate heritage identity implementation pattern identified. A quartet of dimensions informs corporate heritage management activities: validating, articulating, relating and adopting. Equally, four fundamentals underpin corporate heritage identity implementation strategies: narrating, visualizing, performing and embodying. Although linked, the aforementioned categories are qualitatively different. A normative framework synthesizes and marshals the findings. This empirical study provides insight into corporate heritage identity management and, therefore, is of utility to scholars and practitioners alike.

Summary statement of contribution

This study advances the nascent area of corporate heritage identity management by providing empirical and theoretical insight into the salience and strategic relevance of corporate heritage identity as a resource for corporate marketing. The article provides a normative framework of

actionable categories of activities related to the management and implementation of substantive corporate heritage identity dimensions.

Keywords: Corporate Heritage; Corporate Heritage Identity; Corporate Marketing; Corporate Identity Management; Case Study; Qualitative Research.

1 Introduction

The purpose of this empirical study, which has as its focus Great Britain's oldest brewery (Shepherd Neame, established in 1698), is to further elaborate the nascent area of corporate heritage identity management by making a theoretical and instrumental contribution to this emerging field of corporate marketing scholarship. In particular, this research examines the understanding of senior and middle managers in regard to the strategic utility of a corporate heritage identity and the various manifestations and representations of different corporate heritage attributes that constitute a corporate heritage identity.

After articulating the purpose, motivation and context of the study in the introduction, the article first discusses corporate heritage and corporate heritage identities by drawing on the emergent literature. In addition, the section focusing on the literature situates the study within the broader corporate marketing domain and argues that the multi-faceted nature of a corporate heritage identity is consistent with an expanded notion of corporate identity implementation. Following on from this, the next section enumerates the efficacy and relevance of the research case. The subsequent section notes the absence of empirical insights relating to corporate heritage identities. The article then presents an overview of the Shepherd Neame brewery and the methodology employed along with the findings from the research. Finally, the article details the

theoretical and instrumental findings of the study; specifies its limitations; and outlines opportunities for further research.

Recently, marketing scholars have shown interest in the concepts of both corporate heritage brands (Balmer, Greyser & Urde, 2006; Urde, Greyser & Balmer, 2007; Blombäck & Brunninge, 2009, 2013; Wiedmann, Hennings, Schmidt & Wuestefeld, 2011a, 2011b; Hudson, 2011; Micelotta & Raynard, 2011; Balmer, 2011a) and, more recently, corporate heritage identities (Balmer, 2011b, 2013) as organizational phenomena. This study is concerned with the corporate heritage identity notion *per se*. For a discussion of the differences between corporate brands and corporate identity see Balmer and Gray (2003).

Specifically, the nascent concept of corporate heritage identity refers to a category of organization where particular identity traits of an organization have endured and meaningfully link its past, present, and prospective future (Balmer, 2011b). In contrast, the corporate heritage brand (covenant) has been defined as the perennial promise underpinning the organization's corporate brand (Balmer, 2013).

As conceptualized by Balmer (2013), stakeholders are likely to attach importance to those corporate heritage identity characteristics of corporate heritage institutions that refer to aspects of an organization's past which stakeholders deem to be relevant for them and for contemporary concerns and purposes. As such, both stakeholders and managers concurrently perceive a heritage organization's corporate heritage identity attributes to have a worth and, therefore, this explains why they should be maintained, nurtured, and passed on to future generations (Balmer 2013).

The increased interest in corporate heritage in the context of corporate marketing is, in part, attributable to its potential utility as a strategic marketing resource: an organizational capability

that can be leveraged in order to afford meaningful differentiation to corporate heritage identities vis-à-vis customers and other stakeholders.

Extant scholarship has identified the genus of corporate heritage institutions (Balmer *et al.*, 2006); focused on the generic qualities and characteristics of corporate heritage brands (Urde *et al.*, 2007; Balmer, 2011a; Wiedmann *et al.*, 2011a, 2011b; Blombäck & Scandeliuss, 2013; Hudson & Balmer 2013) and, more recently, has conceptualized the existence and characteristics of corporate heritage identities (Balmer, 2011b, 2013). This study has corporate heritage identity as its specific focus and, arguably, is the first empirical study relating to corporate heritage identity.

The corporate heritage literature reveals a palpable concern within many heritage organizations in the appropriation of their corporate heritage as part of their firm's corporate marketing activities focused on their corporate brands (Balmer *et al.*, 2006; Urde *et al.*, 2007) and corporate identities (Balmer 2011b). A growing number of organizations refer to their heritage in their formal corporate communications which represents also *prima facie* evidence for the increased relevance of the notion of corporate heritage identities: Patek Philippe SA is a prominent case in point.

Some business and non-business organizations appropriate and valorize selective aspects of their institutional (i.e., organizational) pasts as corporate heritage. Many of them can be characterized as heritage institutions such as Bentley, Jaguar, Rothschild, etc. (Balmer *et al.*, 2006; Urde *et al.*, 2007). Some can be classified as having a particular genus of corporate identity, namely, a corporate heritage identity (Balmer, 2013).

However, empirical insight into the management and implementation of corporate heritage identity as a strategic resource for corporate-level marketing purposes is still slight. This is

surprising given the growing interest in historical references within marketing academia and practice in general (see Blombäck & Brunninge, 2009, 2013; Hudson 2011; Hudson & Balmer 2013).

As such, this empirical study specifically aims to meaningfully advance the instrumental and theoretical understanding of corporate heritage identity management. In particular, this research focuses on managerial comprehensions in regard to corporate heritage identity management. Scholars in the area have long recognized the custodial role of managers in terms of corporate identity (Balmer 1995; Balmer & Greyser, 2002, 2003). More recently, empirical research has highlighted the importance of management cognitions and self-understanding for corporate identity management and implementation (He & Balmer, 2007, 2013; He, 2012).

In light of the above, a significant aspect of this study is the emphasis on the multi-modal (i.e., utilizing different implementation approaches at once) and multi-sensory (i.e., addressing different sense experiences at once) dimensions of corporate heritage identity manifestations and representations and their significance for corporate heritage identity management.

Mindful of the work of Balmer (1998, 2001) and Bartholmé & Melewar, (2009, 2011) multi-modal and multi-sensory corporate identity systems refer to the importance accorded to the integration of diverse implementation manifestation such as design, communication, behavior (multi-modal) and the importance given to and the amalgamation of the senses that is sight, sound, scent, taste, touch (multi-sensory) by which an organization's identity manifests vis-à-vis internal and external stakeholders.

An explicit corporate marketing perspective (Balmer, 1998) informs the research, which accords strategic marketing significance to organizational phenomena at the corporate level (see for example Balmer 1998, 2001, 2011c; Balmer & Greyser, 2003, 2006; Powell, 2011;

Hildebrand, Sen & Bhattacharya, 2011; Abratt & Kleyn, 2012), situating the study within the broader discipline of marketing. An unabated interest in corporate identities has characterized the corporate marketing domain since the mid-1990s (see for example Balmer, 1998, 2001, 2008, 2011c; Melewar & Saunders, 2000; Melewar, 2003; Bick, Jacobson & Abratt, 2003; Suvatjis & de Chernatony, 2005; Melewar, Karaosmanoglu & Paterson, 2005; Melewar, & Karaosmanoglu, 2006; Powell, 2011; Leitch & Davenport, 2011; Abratt & Kleyn, 2012).

The corporate heritage identity construct discussed in this article falls within the disciplinary realm of corporate marketing (Balmer 1998, 2001, 2009a, 2011c; Balmer & Greyser, 2003, 2006; Powell, 2011; Hildebrand, Sen & Bhattacharya, 2011; He & Balmer, 2013).

According to Balmer (2011c) corporate marketing:

“is a customer, stakeholder, societal and CSR/ethical focused philosophy enacted via an organization-wide orientation and culture. A corporate marketing rationale complements the goods and services logic. It is informed by identity-based views of the firm: this is a perspective which accords importance to corporate identities and corporate brands...”

(Balmer, 2011c).

The corporate heritage identity concept falls within this field because, as with corporate marketing, corporate heritage identities have an institutional (i.e., organizational) focus, they can afford a strategic advantage and also inform the culture of the organization. The latter are particularly pertinent in the context of this study's scrutiny of senior manager's conceptualizations of the construct and the strategic implementation vis-à-vis the company's stakeholders. Further, corporate marketing advocates a trans-temporal orientation towards corporate marketing management, taking into account not only present but also past and future

stakeholders (Balmer, 2001; Balmer & Greyser, 2003), which is relevant for corporate heritage identities (Balmer 2011b, 2013) and corporate heritage brands (Balmer et al 2006).

In addition, this study focusses on a family-owned corporate heritage identity. Marketing scholars have noted the lack of marketing research in relation to family-owned companies (see Berthon, Ewing & Napoli, 2008; also see Abimbola & Vallaster, 2007; Abimbola & Kocak, 2007; Craig, Dibrell, & Davis, 2008; Parmentier, 2011; Reuber & Fischer, 2011; Fetscherin & Usunier, 2012; Blombäck & Brunninge, 2013). Extant studies on the area tend to focus on large – often global – corporate entities (see Balmer *et al.*, 2006; Urde *et al.*, 2007; Hudson, 2011; Wiedmann *et al.*, 2011a, 2011b) whereas this study has as its focus a medium-sized company operating in the south east of England.

This study is the first empirical study of its type owing to its focus on a prominent British and family-owned corporate heritage identity. As such, the article derives research insights from a theory-building exploratory qualitative- case study undertaken within a centuries-old organization – namely Shepherd Neame: Britain’s oldest brewery. Also, this brewery has the distinction of being one of Great Britain’s oldest surviving corporate entities.

Two classes of management responsibilities vis-à-vis corporate heritage identity management are revealed by the study. Corporate heritage identity management activities and corporate heritage implementation strategies are the two classes identified: both of these classes follow a particular corporate heritage implementation pattern. In addition, the article introduces an integrated normative framework of actionable categories based on the findings of the research and interpreted through the conceptual lens of the corporate heritage identity construct.

The insights of this study aim to be of utility of both academics and practitioners alike.

2 Literature

2.1 *Corporate heritage: emergence and early development*

The corporate heritage identity concept (Balmer, 2011b) emerged from research on monarchies as corporate brands (Balmer, Greyser & Urde, 2004, 2006) as did the much earlier corporate heritage brand construct (Urde et al., 2007; Balmer, 2009b; 2011a). The foundational work on monarchies quickly came with a realization that the corporate heritage brand notion (Balmer et al., 2006) was of saliency to many organizations (Greyser, Balmer & Urde, 2006; Urde et al., 2007; Balmer 2009b).

For the main, the extant literature has focused on the generic characterization, conceptualization and delineation of corporate heritage brands (Urde et al., 2007; Balmer, 2009b, 2011a; Hudson, 2011). The most notable empirical study to date has explored corporate brands as a strategic resource (Hudson 2011).

A parallel stream of inquiry relates to the notion of brand heritage, which focusses on both product and corporate brands (Hakala, Lätti & Sandberg, 2011; Wiedmann *et al* 2011a, 2011b). The focus with this type of research is on brand heritage at both the product brand and corporate brand levels. Notable research in this area has focused on the perceived value of brand heritage to customers (Wiedmann *et al.*, 2011a, 2011b).

2.2 *The nascent field of corporate heritage identity scholarship*

Recently, attention has also focused on the corporate heritage identity construct (Balmer 2011b; 2013). This stream of inquiry conceptualized that an organization, by virtue of having unique heritage, is invested with certain institutional heritage identity attributes and this was

described in terms of a company's heritage footprint (Balmer, 2011a). As such, corporate heritage forms a central dimension of the corporate identity of these organizations and can be leveraged as a strategic resource for corporate identity generally and corporate heritage identity specifically (Balmer, 2013).

Corporate heritage identities as conceptualized by Balmer (2011b) constitute a distinct category of corporate identity. He notes how corporate heritage identities are qualitatively different from corporate heritage brands. This explains the need for empirical research, which has the corporate heritage identity construct as its explicit focus. To date, the nascent literature on corporate heritage identity is conceptual in nature only.

A key aspect of corporate heritage identity is the enduring nature of key corporate heritage identity traits (Balmer 2011b). Such traits meaningfully link its past, present, and future. In this way, corporate heritage identities feature a quality of timelessness by being concurrently retrospective and prospective (Balmer, 2011b).

Balmer (2011b) also argues that corporate heritage identities are imbued with traditional authority based on the apparent temporal transcendence of their corporate heritage identity traits (Balmer, 2011b). However, in order to remain relevant, corporate heritage identities need to be mindful not only of their meaningful past but also responsive to change. As such, corporate heritage identities are only "relatively invariant" in that they "appear to remain the same yet change" (Balmer, 2011b, p. 1387).

Further, the conceptualization also suggests that customers and other stakeholders find these heritage attributes to be relevant for their contemporary concerns and purposes: they serve as a kind of *reference point* for stakeholders linking the present to the past and the future alike owing to their familiarity, stability as well as continued future relevance to stakeholders in the present

(Balmer, 2011b). Meaningful corporate heritage identities require reciprocal trust, affinity and authenticity on the part of an organization and its stakeholder community of the past, present and prospective future (Balmer, 2011a, 2013).

The strategic worth of many corporate heritage identities explains why these corporate heritage identity attributes are maintained, nurtured, and are invariably passed on to future generations, both within and outside the organization by stakeholders, managers and business owners (Balmer 2011b, 2013).

2.3 Design, and the multi-modal and multi-sensory aspects of corporate identity

In terms of management processes and orientations underpinning the successful enactment of the multi-sensory dimension of corporate identity, an examination of the corporate heritage identity found an absence of empirical work on the area and limited empirical work in relation to corporate identity in general (van den Bosch, de Jong & Elving, 2006; Bartholmé & Melewar, 2009, 2011).

Significantly, corporate identity scholars have, for some time now, acknowledged how manifestations of corporate identities are invariably multi-modal and multi-sensory in nature (Balmer, 1998, 2001, Bartholmé & Melewar, 2009, 2011).

Multi-modal and multi-sensory corporate identity systems refers to the integration of all implementation strategies (e.g., design, communication, behavior) and sensory means (i.e., sight, sound, scent, taste, touch) by which an organization's identity manifests vis-à-vis internal and external stakeholders (Balmer 1998, 2001; Bartholmé & Melewar, 2009, 2011).

Within the corporate identity literature the importance of an integrated perspective has long been recognized as exemplified by the original triad of the corporate identity mix: corporate

design, corporate communication and corporate behavior (Birkigt & Stadler, 1980). From an explicit corporate marketing perspective, integrative endeavors vis-à-vis sensory identifications, design, communication, and identities have also informed the territory for some time (Balmer 1998, 2008, 2009a).

The multi-modal and multi-sensory foci also mirror the growing focus on aesthetics and experiential marketing in the marketing field in general (Schmitt & Simonson, 1997; Pine & Gilmore, 1999; Schmitt, 1999; Lindström, 2005; Schmitt & Rogers, 2008; Brakus, Schmitt & Zarantonello, 2009; Klingmann, 2010).

Also, marketing scholars have increasingly commented on the importance of corporate architecture, landscape architecture, spatial design, and corporate atmospherics (e.g., Berg & Kreiner, 1992; Schmitt, Simonson & Marcus, 1995; Baker & Balmer, 1997; Messedat, 2005; Bartholmé & Melewar, 2009, 2011; Uhrig, 2012).

From an explicit design perspective, some corporate identity scholars are mindful of the integrated corporate design provenance of the corporate identity territory concept (Balmer, 1995, 2008) and note the importance of corporate visual identity (Baker & Balmer, 1997; Melewar & Saunders, 2000, Melewar, Saunders & Balmer, 2001; van den Bosch, Elving & de Jong, 2006).

As such, corporate design and corporate visual identity both constitute important parts of the corporate identity construct *per se* (Melewar & Karaosmanoglu, 2006) – the symbolic dimension – and partially constitute an organization's overall expressive dimension linking the internal and external realm of the organization (Abratt & Kleyn, 2012).

In summary, the multi-dimensional nature of corporate heritage identity management and implementation tentatively discussed in the corporate heritage literature is consistent with more

general developments in the wider corporate marketing literature as well (see Balmer 2009a; 2011c).

2.4 *The management of corporate heritage and corporate heritage identity*

The corporate identity literature has long noted the importance of corporate identity management and the important role of senior managers (Balmer 1998, 2009a; Bick *et al* 2003; Bartholmé & Melewar, 2009, 2011). Recently, marketing scholars have stressed the importance of management cognitions and self-understanding for corporate identity management and implementation (He & Balmer, 2007, 2013; He, 2012).

Specifically, the extant corporate heritage literature conceptually stresses the close link between management understanding and corporate heritage brand management (Urde *et al.*, 2007, Balmer 2001a, Hudson 2011) and corporate heritage identity management (Balmer, 2011b, 2013) but empirical work on the area is limited. In particular, scholars have conceptualized the multi-dimensional nature of corporate heritage identity management/corporate heritage brand management as applied to monarchies as corporate brands (Balmer *et al.*, 2004, 2006; Greyser, Balmer & Urde, 2006; Balmer, 2009b).

The importance of corporate heritage identity management has been noted within the embryonic conceptual literature on the field (Balmer, 2011b, 2013). Balmer (2011b) argued that senior managers should share a management mindset – a custodial responsibility – for managing, maintaining and protecting the corporate heritage dimension of the corporate heritage identity (Balmer, 2011b). The survival and saliency of a corporate heritage identity is likely to be dependent on management custodianship.

However, to date, empirical work in relation to corporate heritage identity management is absent and the specifics of corporate heritage identity management have not been scrutinized.

3 Relevance and rationale of the research case

This research is unique in being the first major empirical study of corporate heritage identity and is a significant because the study has as its focus one of Great Britain's oldest corporate heritage entities.

This study is noteworthy for other reasons too, because the research addresses the link between managerial self-understanding and corporate heritage identity management; focusses on the multi-dimensional nature of corporate heritage identity management and implementation; and investigates a prominent, medium-sized, and family owned British business operating within the British brewery sector which is important in terms of annual turnover, employment, and cultural relevance.

In particular, the study undertaken here focuses on managerial comprehensions – the meaning and utility of corporate heritage – and how distinct forms of corporate heritage identity implementation within a corporate marketing context reflect these aspects. In doing so, the study addresses and integrates the two aspects identified as lacking empirical insights while being highly relevant in conceptual terms.

This case is a unique and important case study in itself, since the research examines the concept of corporate heritage brands within Britain's oldest brewery. Within Great Britain, some 30 family-owned breweries remain independent despite the dominance of multi-national breweries. Insert 1 provides background information on Shepherd Neame Ltd., Great Britain's oldest brewery.

Insert 1: Case company background (about here)

4 Methodology

The study adopts an exploratory theory-building single case study research design within the qualitative-inductive research tradition.

An in-depth single case provides the rich materials necessary for understanding and explicating corporate heritage identities and enables a prolonged hermeneutic interaction between empirical data, emerging framework and extant literature, in order to clarify the boundaries of the concept (Dubois & Gadde, 2002; Verschuren, 2003; Dubois & Gibbert, 2010).

Thus, the study is less concerned about the statistically representative number of respondents but rather interested in gaining “access to cultural categories and assumptions according to which one culture construes the world” (McCracken, 1988, p. 17).

Case-based research is an established research method in business and management (Bonoma, 1985; Eisenhardt, 1989; 1991; Eisenhardt & Graebner, 2007; Dyer & Wilkins, 1991; Gummesson, 2000; Woodside & Wilson, 2003; Yin, 2009; Woodside, 2010).

As the study approaches the phenomenon of corporate heritage identity from an implicit strategy angle, because of the strategic nature of the corporate marketing logic adopted, the focus is very much on the cultural categories and assumptions of directors and managers due to the former’s role as dominating organizational members determining strategy (Hambrick & Mason, 1984; Hambrick, 2007) and the latter’s important mediating role within and without organizations (Wooldridge, Schmid & Floyd, 2008) and due to their important role in corporate for corporate-level marketing (Gregory, 2007; Vallaster & Lindgreen, 2011).

Company directors and managers are powerful agents, concurrently influencing meaning (Smircich & Morgan, 1982; Gioia & Chittipeddi, 1991) and representing the organization vis-à-vis different stakeholders (Hambrick & Mason, 1984; Barich & Kotler, 1991; van Riel, 1997).

Based on an initial review of the extant literature and using a *sensitizing mode* (Blumer, 1998 [1969]) some broad *preliminary concepts* (Yin, 2003) already tentatively discussed in the literature in conjunction with corporate heritage (e.g., management mindset and custodianship) provided initial guidance and focus for this study and increased the author's *theoretical sensitivity* (Glaser, 1978). Hence, through these concepts the study is situated in a disciplinary and theoretical context that informs and guides the selection of the case itself, the identification of relevant units of analysis and indicates likely types and sources of data (Yin, 2003). For example, the work of Urde et al. (2007) provided a generic framework that facilitated the selection of suitable companies to be studied.

However, in being sensitizing or preliminary these concepts are not fully operationalized in the sense that a positivist theoretical framework determines a deductive-nomological study, but rather flexible in order to accommodate and answer to new insights generated during the course of the project by constantly engaging the data with emergent theory and vice versa. As such, the final result of this study emerged from a prolonged iterative interaction between different empirical data and the researchers' interpretative work.

Figure 1: Research stages of the study (about here)

The study progressed through four different stages (Figure 1). The first stage involved the identification of sectors and companies for which an in-depth qualitative case study could take

place. After considering a number of sectors the researchers decided to focus on the British brewing industry. After contacting those breweries – and following the work of Urde *et al.* (2007) – that broadly conformed to being corporate heritage organizations, the researchers gained access to two breweries based in the south of England.

A pilot study conducted within one of the breweries which shared broadly similar organizational characteristics to the Shepherd Neame brewery (family-owned, multi-generational, SME).

The pilot study confirmed the appropriateness of the preliminary concepts and overall research design. Seven pilot interviews were undertaken with managers which enabled a fine-tuning of the research guide and tentative questions. This approach follows a generally recommended procedure within the canon (Gummesson, 2000; Yin, 2009).

For example, one result of the pilot study was the decision to approach the interviews in a more open less-structured way and to use the detailed questions in the interview guides as prompts and reminders rather than as precise questions asked every time. This facilitated the researchers' objective of better capturing the participants' points of view.

During the third stage, the researchers collected data within the Shepherd Neame Brewery in the town of Faversham, Kent during periodic visits over a six-month period in 2010.

The Shepherd Neame brewery was deemed to be suitable for this case study because of the wide access granted (the brewery used for the pilot study only allowed for limited access), the existence of an extensive company archive and the company's manifestly clear appropriation of heritage for corporate marketing purposes. Furthermore, the company had the distinction in that the firm is Britain's oldest brewer and one of Great Britain's oldest continuously trading companies: the Shepherd Neame business spans five centuries.

Open and semi-structured audio-recorded interviews with a cross-section of directors and managers comprised the primary mode of data collection. The interviews lasted between 45 and 90 minutes (approx. 16.5 hours of recorded interview time) resulting in interview transcripts in excess of 170,000 words of textual data. The researchers took reflective field notes before, during and after these interviews.

Further, the researchers scrutinized company documents and archival materials (e.g., corporate communication reports, strategy documents, annual reports, in house and customer magazines, historical archived materials, along with documents in the public domain such the company website). The authors were thus able to familiarize themselves with the company's past in order to better understand the company's provenance and present day heritage claims.

Textual documents are cultural artifacts representative for various "discursive strategies" employed by management (Moisander & Valtonen, 2006) and revealed much about the identity and heritage claims made about the organization (cf. Chreim, 2005). The inclusion of historical documents is consistent with past research on organizational phenomena (Pettigrew, 1979; Kimberly & Rottman, 1987; Kimberly & Bouchikhi, 1995).

Visual data (i.e., pictures taken by the authors during site visits) was also collected with the primary purpose of documenting spatial environments and material artifacts and later used as additional prompts for the authors' interpretative engagement with the interview and document data (Rose, 2007).

The broad variety of different additional textual and visual data collected enabled the triangulation of the data and method in accordance with the precepts of case-based and qualitative research (Yin 2009; Flick, 2009; Denzin, 1989). However, in contrast to ethnographic studies non-participant observation informed the study only in a secondary fashion in order to

enrich and corroborate insights derived from interviews and document research (e.g., participation in guided visitor tours, company presentation, beer festivals, pub and hotel visits by the authors).

The fourth stage of the study marshals the principles of abductive-inductive analysis (Lincoln & Guba, 1985; Corbin & Strauss, 2008) as a means of examining the data. Facilitated by Software (MAXQDA 10) for storage, retrieval, and coding purposes, the researchers carried out a three-stage coding process, which is common with qualitative and grounded research of this kind (Charmaz, 2006; Corbin & Strauss, 2008; Flick, 2009). The reflective memos and constant comparison and various forms of triangulation, as well as regular peer debriefing, facilitated the iterative process of data analysis and concept development (Flick, 2009; Corbin & Strauss, 2008).

5 Results

The presentation of the findings is within a four-by-four framework of corporate heritage management and implementation (Figure 2). This framework is not arbitrary, but emerges from and is informed by the analysis of the empirical data. An appendix provides selected quotes from interviews for each of the following sections. The interview quotes serve an illustrative purpose only. To reiterate, the framework emerged from the prolonged and iterative analysis of all the different data mentioned in the methodology section.

Figure 2: Corporate heritage identity management/implementation framework (about here)

Four *corporate heritage identity management activities* constitute the first part of the framework: (1) Validate, (2) Articulate, (3) Relate, and (4) Adopt.

These four instrumental management categories managerially underpin and support the multi-modal and multi-sensory implementation (representation and manifestation) of the corporate heritage identity.

The study found that senior managers strategically implemented the corporate heritage dimension of the corporate identity based on four principle *corporate heritage identity implementation activities*: (1) Narrating, (2) Visualizing, (3) Performing, (4) Embodying. The corporate heritage identity implementation activities follow a particular *corporate heritage identity management implementation pattern* linking past, present and future in a meaningful way.

5.1 *Corporate heritage identity management activities*

Corporate heritage identity management activities refer to the managerial self-understanding expressed during interviews, which the management and corporate activities concurrently reflect; and which the researchers synthesize into four different management activities that underpin the implementation of corporate heritage identity as part of the corporate identity in a corporate marketing context.

5.1.1 *Validate*

Validate signifies the question as to whether managers recognize and acknowledge the importance and saliency of heritage for their organization and that heritage is manifested within

the organization (please note that the term validate used here does not refer to the concept of statistical validity in any way).

The study's findings clearly indicate a kind of collective *heritage awareness* amongst respondents.

For example, the company's age and longevity is frequently mentioned as a defining characteristic of the business. Almost all respondents referred to the company as "Britain's Oldest Brewer" (the company's tagline) or sometimes made reference to the company's pedigree in that the company has been in operation "since 1698" (part of the company logo) for more than 300 years.

Further, the saliency of longevity has a close association with a manifested focus on continuity and the survival of the business in the long-term. Longevity and continuity seem to contribute to a profound long-term strategic perspective amongst the management team that the company's strategies and policies reflect.

In addition, the management of the company values and rewards length of service and loyalty amongst staff and pub tenants – with a lower than average staff turnover rate –, maintains long-term relationships with key business partners and suppliers, or favors steady organic growth and incremental improvements over quick fix solutions and rapid expansion – without foregoing lucrative opportunities to grow the company's estate or customer bases if suitable.

The saliency of heritage within the organization is seen in the way the interviewees represent the company's heritage and stress how important this heritage is to them, and the fact that the company employs a company archivist/historian. The archivist's task is not only to systematize and organize the vast collection of historical documents and archival materials that the company

has accumulated over the years, but also to provide historical information and data for use in corporate marketing purposes.

The management of Shepherd Neame has a keen interest in the past of the business partially because of a strong link to the family of the owners themselves, and they are determined to use this history as a strategic resource for various corporate marketing activities.

Further, the brewery still operates within historic buildings steeped in history, with various documents, photographs and memorabilia that were on public display and which presented past glories and current achievements (e.g., recent business awards).

The visitor center of the company is actually not a separate museum tucked away from the present day operations, but is an integral part of the brewery. In this way, the past of the organization is not “on display” only, but the past is actively linked to the current operations, hence the organization’s past is made relevant for present purposes.

Further, more than 200 of Shepherd Neame’s 365 pubs have protected listed buildings status, with some situated within conservation areas. The company has continuously owned some of these pubs since the first half of the eighteenth century (the company acquired the longest owned of these pubs in 1711). Some these pubs have distinctive and meaningful histories in their own right. For instance, Shepherd Neame owns the pub where the English Football Association (EFA) was founded. The pub’s links with the EFA is often mentioned in its formal communications and strengthened Shepherd Neame’s credentials as a corporate heritage identity due to the ownership of historically significant pubs and hotels.

5.1.2 *Articulate*

Articulate denotes the way in which managers were able to specify and *describe substantive heritage dimensions* of their organization that are central to the company's current corporate identity. The managers of the company were all able to define and articulate the substantive heritage traits of their organization and the study found a great deal of shared understanding in this regard as well.

These substantive heritage dimensions are company specific – representing the company's *heritage footprint* (Balmer, 2011a) – and refer to four interrelated aspects that the respondents frequently mentioned as well as being manifest in corporate documents and conduct: (1) quality/craftsmanship/product, (2) community/family/people, (3) locality/territory/place, and (4) independence/individuality/institution (see Insert 2 for more details).

Insert 2: the company's heritage footprint – substantive heritage dimensions (about here)

5.1.3 *Relate*

Relate concerns the alignment and conflation of these heritage dimensions with the company's present identity and the way that the respondents expressed linkages with other heritage and identity domains.

The study found these substantive heritage dimensions to be closely linked to the present identity and core values of the organization. However, the company's heritage is not only self-referentially linked to the institutional identity, but appears to support a reciprocal link of the corporate identity to local and regional identities.

For example, the notion of family and community is seen as extending to all members of the organization and being not restricted to members of the owner's family. The company is frequently described as "close-knit" or "family-like."

Indicative of this dimension are, for example, the many current non-family members of staff within the company that are the second or third generation of their families who work for the company.

Further, the company runs an active pensioners club and invites retired former employees to various social activities as well as supports an active social and sports club that the members of staff themselves organize, and invites pub tenants regularly to meetings and festivities. Often these activities include the families of employees or tenants.

Further, the respondents strongly emphasize the company's active involvement in the local community and the region of Kent.

In addition, most respondents mention the strong identification with the company not only within the company, but within the local and regional proximity of the company as well. They explain that Shepherd Neame has a strong association with the county of Kent. Managers argue that the company is co-owned by the people of Kent, who see the company in a way as *their* brewery.

The strong regional positioning of the company helped to anchor the corporate heritage identity within the regional identity of Kent, but at the same time probably renders a national positioning (of the corporate identity) more difficult.

However, consulting the documents and archived materials showed how the company has continuously expanded the company's geographical reach, territory associations and references. As such, the company has evolved from being one of many local breweries originally associated

with the town of Faversham, to an East Kent brewery and finally into its current position as the quintessential brewery of Kent.

5.1.4 Adopt

Adopt refers to the way the management embraces the company's revealed corporate heritage identity as responsible custodians of that heritage and for the strategic appropriation of heritage for corporate marketing purposes.

To reiterate, the study indicates a kind of heritage awareness amongst management (i.e., Validate) reflecting (1) a sense of longevity fostering long-term thinking, (2) a sense of continuity that is concurrently retrospective and prospective. The study finds both aspects to be linked to an expressed overarching (3) sense of responsibility, which can be described as some kind of guardianship or custodianship. Hence, all three aspects flow together and reinforce each other.

However, corporate heritage identity awareness in the context of this study is more expansive. For example, the aspect of responsibility and custodianship is not confined to the organization's corporate heritage identity, but this aspect is closely intertwined with other heritage domains. The company is represented in many documents as a custodian of cultural heritage at different levels, which is also manifested in different activities of the business.

One example is the conservation and preservation of the many listed buildings the company owns and still acquires. This acquisition, conservation, preservation of historic buildings is not only seen as a sound financial investment but is also meaningful in protecting England's pub heritage.

Further, against the backdrop of a high level of consolidation within the UK brewing industry, the domination of the market by multi-national brewing conglomerates and the closure of many regional and national brewers, the company portrays itself as a guardian of the UK's brewing heritage. A final example would be that the company is home to the National Hop Collection (in collaboration with a local hop farmer) of 250 different varieties of hop plants preserving the UK's hop growing heritage.

5.2 Corporate heritage identity implementation

Corporate heritage identity implementation refers to patterns and multiple strategies of how the company at large links the past to the present and a potential future in a meaningful way; how the managers present the company during interviews and in other ways such as in public and promotional documents and corporate marketing activities reflects this aspect.

5.2.1 Corporate heritage identity implementation pattern

As discussed above, corporate heritage is a fundamental part of corporate identity linking the present identity to the past identity in a meaningful and potentially future relevant way. Hence, the identified heritage dimensions coalesce with corporate identity.

The study reveals three principal concurring and interrelated patterns (Figure 3) in which managers during the interviews, and within organizational documents and other corporate marketing activities as well, realize these links with the past and future.

Figure 3: Three basic patterns of corporate heritage identity implementation (about here)

The following temporal dyadic relations inform the three patterns of corporate heritage identity implementation: (1) the conflation of past and present, (2) the conflation of old and new and (3) the conflation of traditional and modern. These temporal dyads represent recurring themes that managers use in order to articulate their organization's corporate heritage identity during the interviews. The dyads also represent an identifiable pattern of corporate heritage identity implementation deliberately employed by management through corporate marketing activities. Of importance here is the notion of conflation. The notion of conflation indicates that those relations are retrospective as well as prospective and converge in the present. In addition, the study identifies patterns juxtaposing relations between similarity and difference.

While the conflation between past and present indicates a more generic form of corporate heritage manifestation (e.g., what was then and what is now) the dyads of old and new as well as traditional and modern are more specific forms. The former tends to focus on temporal discontinuity while the latter stresses temporal continuity between past and present.

Furthermore, the authors recognize patterns with a balanced focus on continuity and adaptation, quite similar to the notion of confluence that Chreim advanced (2005) in the context of organizational identity (from an organizational behavior/management perspective) seen as a narrative construction. However, these dyadic relations – the study reveals – are not mere narrative constructions or rhetorical tropes such as management deploy, but can be seen in various material consequences or manifestations of the corporate heritage identity.

As such, the historical repository of the company is used as a resource for the construction and representation of the company's identity in the present, rather than in a purely retrospective

sentimental way. Hence, the corporate identity based on these heritage dimensions is represented as relevant and meaningful in and for the present and a potential future.

Thus, the research identifies four different strategies for implementing the corporate heritage dimension of the corporate identity of which narrating is but one.

5.2.2 Corporate heritage identity implementation strategies

5.2.3 Narrating

Narrating refers to the actualization of the corporate heritage identity dimension through narrative forms that link past, present, and future and constitute an overall corporate heritage story.

Historical references establish links between the past, present and future across different types of communication ranging from press releases, the company magazine, annual reports, and the company's website. Individual stories and narratives provide a hook for media and the public, imbuing them with an emotional and personalizing dimension. Out of these individual narratives and stories that link past and present a central corporate heritage story emerges that partially constitutes the heritage status of the organization in narrative form.

5.2.4 Visualizing

Visualizing refers to implementing the corporate heritage identity dimension by using visual design elements linking the past, present, and future.

The study shows that the corporate heritage identity status of the company is facilitated by the use of photographs and other visual design elements and illustrations that link past, present and

future. These visual data include the combination and juxtaposition of old and new photographs as well as the re-interpretation of historic visual design elements for present day corporate communication and marketing communication purposes, which is a regular and prominent feature in the empirical marketing materials scrutinized and mentioned by managers as an explicitly used approach.

As such, the heritage dimension of the corporate identity is not only actualized in narrative form unfolding the corporate heritage story, but is also visualized with the help of photographs and illustrations that accompany the textual documents. The use of these visual elements makes the link between past, present, and future more explicit constituting a related yet distinct mode of corporate heritage implementation.

5.2.5 Performing

Performing indicates the actualization of corporate heritage identity through traditions, rituals, and customs. Cultural practices such as traditions, rituals, and customs that are strategically used for corporate marketing purposes, some of which are more recent in provenance such as an annual hop blessing or the Bishops Finger Charter (how one of the company's ales is ought to be brewed) introduced in 2003, reinforce the corporate heritage dimension and the central heritage story.

Corporate or corporate-sponsored events and festivals, such as the annual Faversham Hop Festival and Classic Car Rally in which the company is closely involved and for which a Spitfire named steam train runs from London – sponsored by the company since 2003 – re-enacting the hop pickers journeys from London to Kent, further supports the corporate heritage status of the company.

5.2.6 *Embodying*

Embodying refers to the manifestation of the corporate heritage identity dimension in objects and people.

First, the aesthetic properties of material objects and spaces actualizes the corporate heritage identity dimension; including corporate architecture with the company's historic buildings and pubs representing the corporate heritage and manifesting the corporate heritage status of the organization in material form. In order to reinforce the heritage status the company has in recent years strategically acquired historic pubs and hotels in London and the South-East as well. In addition, the corporate visitor center on the historic brewery site serves as a multi-purpose tourist attraction and as a venue offering a wide variety of hospitality and entertainment services.

Next, traditional crafts and historic design patterns are used by re-interpreting them for present purposes and adopting them in a contemporary way ranging from stained glass windows and ornamental glass etching and coloring, linocuts and woodcut prints to traditional poster painting and sign writing. Further, the company uses material artifacts such as beer bottles and labels to reinforce the corporate heritage identity dimensions of the company's corporate heritage identity and uses and re-interprets historical references for contemporary product offerings. In addition, the company operates a fleet of historic delivery vehicles and drays that the firm uses for promotional activities such as pub openings, at festivals or classic car races and the company sponsors an historic barge that in the past transported beer on the river Thames.

In addition, the embodiment of corporate heritage identity manifests also in the personal identities of individual managers professing an interest in the history of the company and in the institutional role of the company historian to provide interesting information about the past of the

company and the company's pubs that can be used for corporate marketing purposes as well as to engage with stakeholders in various ways (e.g., "Ask the Archivist" section on the company's website).

The framework discussed in the previous section serves three main purposes: (a) to structure the presentation and discussion of findings, (b) to conceptualize key insights, and (c) to provide subsequent managerial guidance. To reiterate, the focus of this article is on the instrumental relevance of corporate heritage identity for managers. Therefore, the framework denotes actionable categories of activities related to the management and implementation of several substantive corporate heritage identity dimensions within the corporate marketing context that this study revealed. A journal article, though, cannot report in full the richness and variety of the case but provides a restricted and condensed discussion on the emergent major themes.

6 Discussion and conclusion

In light of the findings, this section outlines the theoretical and practical implications of the research and identifies the study's limitations as well as opportunities for future inquiries.

6.1 Theoretical implications

First, in terms of the extant conceptualizations of corporate heritage identity, the study shows support for the generic heritage characteristics identified in the extant literature (Balmer, 2011b; also see Urde *et al.*, 2007).

However, the research expands the canon in different ways: (1) by identifying the relevance of substantive corporate heritage identity dimensions, (2) by revealing four management

activities that complement the extant categories discussed in the literature (i.e., uncover, activate, protect), (3) by articulating the four multi-modal and multi-sensory strategies of corporate heritage implementation, and (4) by identifying five actual corporate heritage implementation patterns.

Second, the research supports a close link between heritage and identity and seems to reflect many of the findings not only within the conceptual work in relation to corporate heritage identity (Balmer 2011b, 2013) but within the organizational identity and change management literature on the importance of the interplay of continuity and change (Leana & Barry, 2000; Chreim, 2005; Brunninge, 2009) as well as the legitimizing (Carson & Carson, 2003; Brunninge, 2009) and sensegiving purpose of historical references (Gioia, Corley & Fabbri, 2002; Ravasi & Schultz, 2006).

However, this study shows that the relevance of the confluence of continuity and change (Chreim, 2005) is not restricted to identification within an organization, but affords strategic purpose in a corporate marketing context as well. From a corporate marketing perspective these factors are concurrently reflected in the way the corporate identity is articulated by managers and communicated to stakeholders, thus being a strategic resource as well as a potential marker of identity and constitutive for the manifestation of a corporate heritage identity as an apparently timeless yet changing entity (Balmer, 2011c; 2013).

The findings reveal several other dyadic relations to be concurrently constitutive for the construction of corporate heritage identity and identity claims such as the identified temporal dyads conflating past and present, old and new, or traditional and modern, and supports the dual role of corporate heritage identities for signaling temporal stability and contemporary relevance at the same time (Urde *et al.*, 2007; Balmer, 2011b). The conflation of similarity and difference

that is generally thought to be central to any (individual and collective) identity construction accompanies these temporal relations (Cornelissen, Haslam & Balmer, 2007; Gioia, 1998; Jenkins, 2008), providing further indication for the close link between corporate heritage and corporate identity.

The findings also revealed the importance of balancing the past and present to be pertinent in terms of corporate heritage identity management. The aforementioned constitutes a core process of the relational positing of a corporate heritage identity through a conflation of different temporal dyads establishing similarity as well as difference between past, present and future. This study indicates that these dyads underpin the transtemporal nature of a corporate heritage identity spanning all three timeframes without appearing to be nostalgic or purely retrospective.

Further, and more importantly, the study shows the appropriation of these dyads for the positioning and representation of the corporate brand/identity vis-à-vis external stakeholders by using multiple strategies of corporate heritage identity implementation (i.e., narrating, visualizing, performing, and embodying). These corporate heritage identity implementation strategies constitute a specification rather than a substitute for the more generic corporate identity dimensions (i.e., corporate design, corporate communication, and corporate behavior) and support the notion of a multi-modal and multi-sensory identity system (Balmer, 2001; Bartholmé & Melewar, 2009; 2011).

As such, the findings broadly confirm the extant notion of corporate heritage implementation being a multi-modal and multi-sensory endeavor. However, the case study specifies the generic aspect of corporate heritage symbolism in a business context and sharpens analytic and descriptive clarity by identifying the narrative, visual, performative, and embodied nature of corporate heritage implementation.

For example, on the one hand embodying refers to the personification of the corporate heritage identity in individuals such as the CEO and their interest in history as postulated by Urde et al. (2007) but also in the institutionalized role of the company archivist and historian both representing and symbolizing as much as facilitating the corporate heritage identity. On the other hand, the corporate heritage dimension is also objectivated through cultural artifacts embodying the corporate heritage identity in an aestheticized form having symbolic utility *vis-à-vis* stakeholders (Balmer et al., 2004, 2006; Urde et al., 2007).

The symbolic representation of corporate heritage also has a strong performative dimension manifested in cultural practices such as rituals, festivals, and staged events that underpin the heritage status of the company; similar to the findings of Hudson (2011) and reminiscent of the rich symbolism identified in regard to monarchies (Balmer et al., 2004, 2006). In addition, the findings revealed the importance of all forms of visual representations of a corporate heritage identity. Finally, the storytelling capacity of corporate heritage identity is supported (Urde et al., 2007) with the narrative use of corporate heritage identity elements being identified as a central implementation dimension as well.

Third, beyond the particular focus of this study on corporate heritage, the identified importance of place/locality/territory for the corporate heritage identity and stakeholder identification suggest that the extant rather generic conceptualizations of corporate heritage identities in general should take into account possible differences between corporate identities that operate at a local or regional level and national or global corporate identities. The study suggests a strong interdependence between place/regional identities and corporate heritage identities for the former type of organization.

6.2 *Managerial implications*

The conceptual framework (Figure 1) and the pattern of several dyadic relations linking the past to the present in a meaningful way (Figure 2) provide instrumental and practical guidance on the appropriation and management of corporate heritage identity and the positioning of corporate heritage identities/brands in the wider societal context vis-à-vis stakeholders.

Validate: A prerequisite for the successful utilization of corporate heritage identity as a strategic resource is the shared understanding and acknowledgement amongst the management team that heritage is important per se, that heritage has use value for contemporary purposes and that heritage is inextricably linked to the present corporate identity. It needs to be validated as such.

Articulate: Managers need to identify and clearly articulate one or several substantive corporate heritage identity dimensions that are closely aligned with the identity of their organization and that are more specific than some broad characteristics such as longevity or long-term continuity alone. The scrutiny of the historical trajectory of the organization, identifying key events, incidence, stories and achievements uncovers sources of heritage.

Relate: The past only provides the materials from which a corporate heritage identity dimension is crafted in the present, but does not constitute a heritage dimension by itself. Hence, management must constantly and actively link the historical materials to current concerns in a way that makes them relevant for the present identity within the organization fostering heritage awareness, and renders meaningfulness for the purpose of corporate identity positioning – anchoring the corporate heritage identity within the wider societal context vis-à-vis stakeholders.

Adopt: The shared validation, clear articulation, meaningful relation to the present within and beyond the company and a balanced communication of the heritage dimensions need to flow into

a shared sense of responsibility for the corporate heritage brand. Although the CEO and the management team have an important custodian role, stakeholders within and outside the organization need to be encouraged to take responsibility for the corporate heritage identity as the emotional ownership of a successful corporate heritage identity rests with them as well.

Implement: A balanced use of dyadic relations between continuity and change, past and present or similarity and differences is necessary in order not to be one-sidedly tilted towards the past (nostalgia, old-fashioned), but being in the present. In this way, well managed corporate heritage identities not only justify their claims and promises by what they do now in the present, but are able to refer to what the company has always done and what the company can do in the future as well. The implementation of the heritage dimensions should rest on multiple strategies that take into account the experiential and sensory dimensions of corporate heritage as well.

6.3 *Limitations*

The insights and conceptualizations of this study are based on the accounts of management corroborated by documentary and observational evidence. To some degree, these findings reflect the way the company is represented to the various publics, including the authors as researchers interested in what is going on. Hence, no substantiated claims can be made about the perceptions and actions of other stakeholders within and outside the organization. Any inferences about other stakeholders have to be read with these limitations in mind.

Further, the study's insights are analytically generalizable to a certain degree and within the limitations of the study, but they are not so in statistical terms. However, this is consistent with the paradigmatic convictions of the researchers, the research purpose, and the general methodological approach taken within this study.

Another caveat is that this study relates to a medium-sized family-owned regional brewery and may not be applicable to much larger national or multi-national breweries, which might also be corporate heritage identities. Similarly, the temporal and spatial specificity of the case study might limit the applicability of the findings in other industrial, organizational, cultural or temporal contexts.

6.4 Further Research

The limitations of the study and some of the theoretical implications presented above afford further opportunities and directions for research.

Future studies could look at similar organizations within the same or another industrial context in order to expand and corroborate the findings advanced in this article.

Further research could also focus on specific stakeholder groups such as consumers, media intermediaries, investors, local communities or business partners in reference to the efficacy of corporate heritage dimensions and corporate heritage identity implementation strategies.

Additionally, future enquiries research could focus on corporate heritage identities that operate at a national or international level, rather than the local or regional.

Other potential direction for research could be longitudinal studies of the same organizations in order to trace the change of corporate heritage identity dimensions and the relevance of implementation strategies over time and relate those changes to history-specific conditions that might favor or disfavor certain heritage dimensions and the subsequent appropriation for corporate marketing purposes.

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Appendix*

Corporate heritage management categories (exemplary indicative quotes)		
Validate	Longevity	<i>"We are clearly very aware of our heritage, the fact that the company was one of the first to be registered as a company, the fact that we've been brewing on this site actually not since 1698, it's 1570 – research has taken it further back. So, at that level, one is very aware of the family involvement, the history, the longevity of the business and the fact that we've owned properties for nearly 300 years which is very unusual."</i> (Director)
	Focus on continuity	<i>"And I think fundamentally, whilst it certainly makes good business sense, there have been arguments at times to say do we carry on brewing? Is that economic? Do we split the company up? But in all of those debates really the overriding thing has been to maintain the company."</i> (Director)
	Long-term perspective	<i>"And I think the other thing is as well, everything that I face here would be the decisions we make today, we kind of want to stand by them in 5 years' time, in 10 years' time. And that's just... it's much harder in my view to deliver long term thinking."</i> (Director)
Articulate	Quality/ Craftsmanship/ Product	<i>"And very much looking at quality and traditional values, local ingredients. All the hops we use are grown locally, the water's drawn from the brewery's own artisan well, we culture the yeast on site, we use local barley when we can and then the rest of the barley comes from elsewhere in the UK."</i> (Manager)
	Community/ Family/ People	<i>"We're still a family-owned business... And that sets a certain sort of style and goes through the values and standards that Shepherd Neame stands for really..."</i> (Director) <i>"And that we're a family brewery and that we strongly believe in looking after people, being part of the community."</i> (Manager)
	Place/ Locality/ Territory	<i>"We're unique in so far as we have, I think geographically we're quite tucked away in a corner. It's kind of like a frontier land, very close to the continent and in that regard we've been able to create an estate in a corner, our little corner of England where we can defend both our estate and our trade – historically we've been able to do this anyway."</i> (Director) <i>"I think that plenty of people own great pubs in this country. We own great pubs. But I think when people come to the brewery, look at its site, its location, just get a feel of the spirit of the place, you actually realize this is a bit different."</i> (Director 2)
	Independence/ Individuality/ Innovation	<i>"I think to be a business, to survive this long, you have to have an eye for the future, willingness to invest in technology and practices that seem maybe pretty mad at the time; and the skill of the Board and of the company is to find the next slightly mad concept that seems very strange to us at the time, but will actually become very important to us in the future. And I think that we have a heritage of doing that as a company otherwise we wouldn't be here."</i> (Manager)
Relate		<i>"It's what I always say is that there's a huge number of people involved in Shepherd Neame whose own families have been involved here for many, many, many years."</i> (Director) <i>"And it's a fundamentally important part of Kent life. If you say to anybody you work at Shepherd Neame, immediately they're interested and immediately someone knows something about Shepherd Neame."</i> (Manager)
Adopt		<i>"There seems to be an overarching sense of responsibility which filters down from the directors really and so decisions are made and if I was to compare us with other pub companies, I would say that our decisions are not purely based on profit and aggressive business approach."</i> (Manager3)

* Please not the use of generic terms (director, manager etc.) due to the size of the business in order not to compromise the anonymity and confidentiality of interviewees (e.g., CEO, director function x, manager y)..

Corporate heritage implementation categories (exemplary indicative quotes*)		
Implementation patterns	Past and present Old and new Traditional and modern	<p><i>"In a lot of our communication you'll see that we talk about the old, we're a long established business, because that appeals to the consumer, but also say we understand modern service levels and we like the dichotomy between old and new. In the Annual Report you'll always see a heritage photograph and you'll see some very modern images, i-pad against steam traction engine or something. And I think that is a key aspect of what we do."</i> (Director)</p> <p><i>"I think a third unique thing about Shepherd Neame, sort of what we're about, is this marriage of the very traditional with the ultra-modern and I think, in those areas where we've managed to do it most successfully, we've been very strong. So if you take a walk around the brewery you'll find ancient buildings, very traditional methods – hand mashing of malt and what have you into our mash tuns – you'll find very traditional methods but in the next door room you'll find state of the art atomized steam injection systems, SAP, running our company, you'll find robots, you'll find the most modern bottling line in Britain."</i> (Director)</p>
	Continuity and change Similarity and difference	<p><i>"You've got to change but you keep your spine values which determine how you do business, how you behave in the wider sense. But in terms of the actual business operation, you fundamentally have to keep changing."</i> (Director)</p> <p><i>"For example, straight away, we're Britain's oldest brewer [...] that gives you reputation, provenance, over anyone else [...] But at the same time, Shep's [Shepherd Neame] – and this is an important thing for me to constantly remember – is not a backward looking company. It's not a retrospective company. It wouldn't be here now...Shep's wouldn't be here now if it hadn't always been forward looking. That's why it's not with the other forty [breweries] in the country that have died over the last 15 or 20 years. Because although it's the oldest, that's nice, that's great, but we'll always keep moving forward, just to stand still. But also to gain the competitive edge. So I think that's quite an important message for us. I think that's one of the values, not to get complacent, and to keep doing something new and something quite different."</i> (Director)</p>
Implementation strategies	Narrating	<p><i>"They [the public] like a story, and we have endless stories...The point is that we have pubs where the FA was founded, we have a fifth generation of this father to son running a business, we have brewers with 150 years' experience between them, we have the only wooden mash tun in the UK. All those things are great hooks for us...Shep's probably is lucky to have more of those points than anyone else."</i> (Manager)</p> <p><i>"Oh, god, it's a massive story. I'm sure that [a director] would have told you a lot more than I can about the story. When you've got that much history within a company, it's great. And okay, some of it, a consumer or a customer is not going to want to know all of it, but there's going to be certain bits that people will find interesting....They'll ask the barman and it's great, because barmen are our salesmen, and giving them something to talk about, they love it."</i> (Manager)</p>
	Visualizing	<p><i>Photographs. That's the first thing. A photograph is immediate; a picture is worth thousands of words, so that is what everyone likes first and foremost because it projects an image; it's understood easily, and it can be looked at, your eye passes across it and it gets fixed in your mind, whereas a document by and large has to be read; so it's photographs. And photographs, by and large, are... which have people in them."</i> (Manager)</p>
	Performing	<p><i>"So I think a lot of that history and heritage gives an atmosphere that is ingrained in everything that happens, rather than it necessarily being something that – it's more subconscious than overt, I would say, with a lot of the things that go on here."</i> (Manager)</p>
	Embodying	<p><i>"I think that it's also partly personal, and [the CEO] I think is very interested in the history of the brewery.(Manager)</i></p> <p><i>"The company logo has still got 1698 in it, which for many years was thought to be the date that the brewery was founded. So you can't have a much stronger link with the past than that. One of the beers that we brew is also called 1698 and I think the date appears on pretty much every bottle of beer that leaves here. So there's some subtlety and almost ingrained through the business there is that heritage. The brewery buildings here are historic, hundreds of years old, and then in areas there's modern equipment inside them."</i> (Manager)</p>

Insert 1: Case company background**Shepherd Neame Ltd.**

Shepherd Neame Ltd., a regional brewer and pub operator based in a small English market town of Faversham, Kent. The company is still a family controlled business (fifth generation of the current family) that traces its origin back to 1698 (although recent historical evidence indicates that the origins of the brewery go even further back well into the sixteenth century) and Shepherd Neame qualifies therefore as Britain's oldest brewer. The company owns about 365 mostly tenanted pubs in Kent and the South East of England (including London) and brews cask ales ('Real Ale') and premium bottled ales such as Spitfire or Bishops Finger, which are PGI (protected geographical indication) protected under EU legislation, as well as several international premium lagers such as Asahi Super Dry or Kingfisher under license. Direct descendants of Percy Beale Neame, who joined the company in 1864, exclusively own the company's unlisted B ordinary shares. The A ordinary Shares trade on PLUS Markets. In the 2009/10 financial year, Shepherd Neame sold 277,000 barrels (UK) of beer (79.8 million pints) with a record turnover of over 115 million pounds sterling. The company has enjoyed moderate, but continuous year on year profit growth for more than three decades (1975–2007) only interrupted by the recent recession in the aftermath of the financial crisis in 2008.. The majority of the sales occur in the UK, although exports are growing steadily (e.g., to Scandinavia or Italy). The company sources locally grown hops (within 25 miles of the brewery) in the production process as well as using natural mineral water from the company's own source. In addition to common industry competitions and awards related to the quality and taste of individual beers, the company has won a stream of business awards in various categories ranging from social responsibility and sustainability to service quality and process excellence. Shepherd Neame is the first brewery in the UK to receive ISO 14001 accreditation for sustainable management. The company has strong links with the local community through, procurement, employment, pubs and various sponsorship activities. Shepherd Neame directly employs about 1,100 people. In the company's corporate marketing activities the company frequently stresses, amongst other things, Shepherd Neame's local origin, heritage and family business credentials, dedication to quality, and the role of Shepherd Neame as a responsible corporate citizen.

Figure 1: Research stages of the study

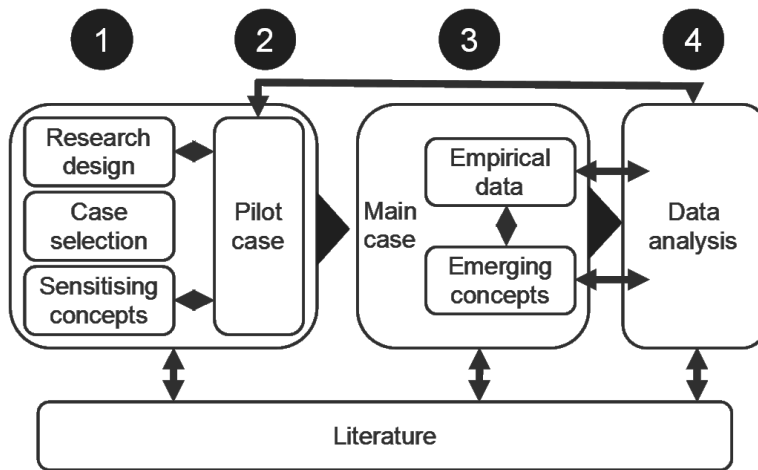
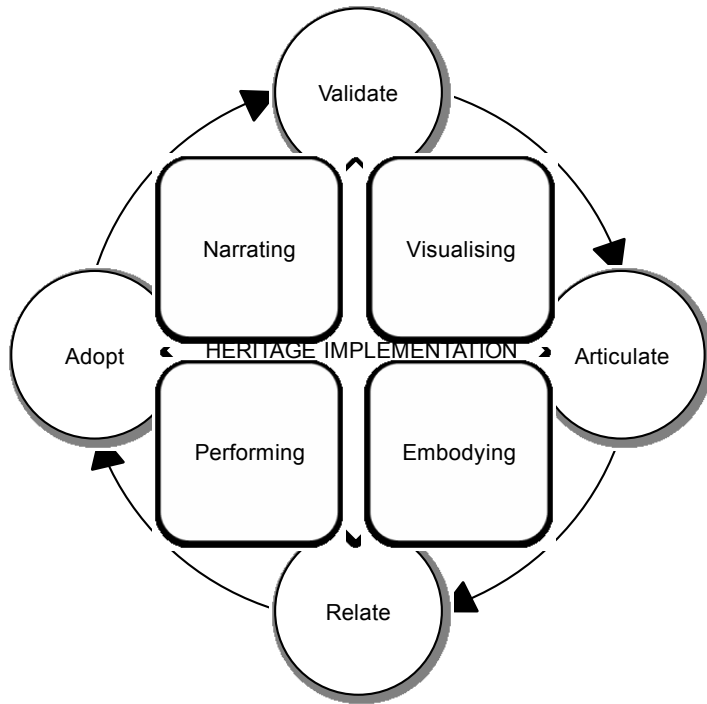


Figure 2: Corporate heritage identity management/implementation framework



Insert 2: the company's heritage footprint – substantive heritage dimensions

Quality/craftsmanship/product

Many respondents refer to a general “passion for quality” within the company that is reflected in the way the representation of the business relating to contemporary corporate marketing purposes as well. Further, many perceive the product of beer itself (especially ales) and the way beer is produced as fundamental aspects of the company's heritage as well as a core aspect of the company's identity. Drawing on historical documents the study also shows that this dimension is fundamental for the company's past identities, although the labeling and representation of this dimension has changed over time.

Community/family/people

In reference to heritage, the company is also described as a community-based business with very strong ties to the company's hometown of Faversham as well as the county of Kent. Further, a strong sense of responsibility as an employer and a corporate citizen seems to be closely associated with that focus on the community and being a family business. Again, not only is this dimension associated with the current identity, but historical documentation also verifies the dimension.

Place/locality/territory

What becomes clear throughout many interviews is that the dimension of place/locality/territory, specifically the location of the brewery, seems to have a very important impact on how and what the interviewed participants articulate as their company's heritage and heritage status. They very much define their company in terms of where the brewery is situated. Their involvement in the community, or the importance accorded to the position of the organization within the local community, partially relates to the specific location of the brewery in the town center. This close association to place is also clear in the historical documents inspected. The importance accorded to the spatial position of the brewery, in a sense, seems to have somehow if not defined, but influenced the strategic positioning of the company as a regional brewery.

Independence/individuality

The nature of the company as a family business and the company's independence frequently appear as important parts of the company's heritage. This sense of independence has another connotation related to individuality and doing things in a different way; interviewees often mention being a pioneer within the industry. This dimension is often verified in corporate documents that refer to the company's track record of innovations adopted in the past and the particular historical instances that substantiate the claims; for example, that the company was the first brewery outside London to install a steam engine in the brewery back in 1789 and an early adopter of steam traction engines for goods deliveries in 1874.

Figure 3: Three basic patterns of corporate heritage identity implementation

