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Towards an understanding of corporate heritage

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Towards an understanding of corporate heritage: Its Evolution from 2006 to 2019 and an Agenda for Future Inquiry

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**Towards an understanding of corporate heritage: Its Evolution from 2006 to 2019 and an Agenda for Future Inquiry**

**Abstract**

Having a meaningful connotation with the longevity of the existence, the concept of heritage is being considered as a key element for international organisations to sustain the competitive advantage. The ample research on heritage made an enquiry to the domain of the research essential. Based on ISI Web of Knowledge, this paper evaluates the knowledge structure of corporate and brand heritage by reviewing 78 relevant articles with 941 citations in 50 journals from the business and management domain, between January 2006 and November 2019. By adopting co-citation analysis and multidimensional scaling, we identified five research groups. Co-occurrence network and algorithmic historiography were also utilised to identify the key themes, emerging and evolution of the seminal works. Based on the recent highly cited, a future model was proposed for researchers as well as international marketers that can provide insights on the evolving topics and trend areas within the research domain.

**Keywords:** corporate heritage; heritage; bibliometric; co-citation analysis; co-occurrence; algorithmic historiography.

1. **Introduction**

Without a shadow of a doubt, heritage serves as a crown for corporations (Balmer et al. 2006). Contrary to expectations, the manifestation of the brand heritage can be traced back to the last decade when Urde et al. (2007) described brand heritage as a dimension of a brand’s identity, found in its “track record, longevity, core values, use of symbols and particularly in an organisational belief that its history is important” (pp. 4-5). Having emerged from the practical perspective and drawn into the theory from the corporate perspective to marketing-being heavily argued by scholars (Pecot et al., 2018, Rose et al., 2016), the first glimpse of the concept of brand heritage has been delineated through specific brands’ case studies over a period of time, which resulted in lack of precise portrayal of the conceptual sphere and therefore its evolution remained scarce.

When it comes to the concept of corporate heritage, notable attempts have been made (Balmer 2011, 2013; Urde et al. 2007) to define and establish the concept of corporate heritage by investigating its underlying foundations as it has not been evaluated in the theoretical contour of the corporate sphere. Its favourable connotation to the past and reflecting the longevity (Balmer and Burghausen, 2018), Balmer (2011) defines corporate heritage as a key internal asset to the survival of the company. Balmer (2013) emphasises that the existing notion of ‘heritage’ has its roots in tourism, particularly museum and historical places as well as culture (Dana and Light, 2011) until its expansion to corporate marketing domain where it has been acknowledged that corporate heritage is an ‘unrivalled asset’-“an asset that can be highly meaningful to customers and other stakeholders across the generations” (p. 291).

With the considerable interest to the concept of heritage in the last decade (Balmer 2011, 2013; Balmer et al., 2006; Balmer and Burghausen, 2018; Elo and Hieta, 2017; Pecot and De Barnier, 2017; Urde et al. 2007; Wiedmann et al., 2011) new notions came into place in the axial of heritage, such as corporate heritage identity and corporate heritage brands. This particular disposition created critical arguments on the concepts and how these notions diverges/converges. As highlighted by Pecot and De Barnier (2017), current literature often evaluates brand heritage from the corporate perspective, in an attempt to offer a broader marketing perspective to the concept of brand heritage. Still, it rather puts the effort on investigating the determinants and the cognitive impacts of brand heritage on consumers perception and behaviour by integrating the signalling theory as a baseline of the proposed relationships (Orth et al. 2019). For corporate heritage, the scholars’ determination on the conceptualisation of the corporate heritage domain has been frequently emphasised while setting up the definitions and its key attributes in different conceptual efforts, such as Balmer’s (2011) paper, where the corporate heritage identities have been scrutinised through the British Monarchy case; Hudson’s (2011) effort to illustrate the concept of brand heritage on Cunard Line, a British-American cruise line founded on 1839; or Burghausen and Balmer’s (2014) empirical study investigating corporate heritage identities through the lens of Great Britain’s oldest brewery: *Shepher Neame*.

The plethora of this research stream on the concept of corporate heritage resulted in the idea itself being largely addressed (Bargenda, 2015; Wiedmann et al. 2014), however, scattered it may be turned out to be, causing a major barrier for its theoretical underpinnings and the future development of the concept itself. One can remark that the academic research on corporate heritage is steadily increasing, as the ISI Web of Knowledge indicates 46 studies in 2014, 82 studies in 2015, and more than 100 studies in both 2017 and 2018. As the majority of the existing work dates back only a decade, being frequently conceptualised and having a lack of empirical studies has constituted the domain intrigue (Merchant and Rose 2013). Pecot and De Barnier (2017) emphasised that the relevant literature is still evolving, while further research could unleash the potential of corporate heritage by providing future directions to scholars. With this paper, we place particular effort on addressing and identifying the knowledge base of corporate heritage and its theoretical foundations. Although there have been some influential attempts have been made to identify and establish the foundations of the concept of the *‘heritage’*, especially within the last decade, (see Balmer 2017; 2011; 2013; Balmer and Burghausen 2018; Balmer and Chen 2017; Burghausen and Balmer 2014; Hudson and Balmer 2013; Urde et al. 2007; Wiedmann et al. 2014), a comprehensive, rigorous and quantitative approach to the associated literature has not been conducted yet.

With these considerations in mind, to provide a rigorous conceptualisation to the domain by adopting a quantitative approach to the literature (Merchant and Rose 2013), to present the robust scrutiny to a dynamic, ever evolving concept of ‘heritage’ (Pecot and De Barnier, 2017), this study aims to respond scholars and to contribute to the heritage domain in several ways. First, by conducting bibliometric analysis- a quantitative approach bolstered with qualitative inquiry (Chabowski et al., 2018, Chabowski et al., 2013), this study aims to broaden the understanding of heritage in business and management domains. Based on the research groups identified through co-citation analysis and multi-dimensional scaling (MDS), this paper aims to propose the emerging themes within the field of heritage. Through the qualitative inquiry, researchers put effort to articulate the research fields developed over time, aims to be a guide for scholars as well as researchers in the field by providing a comprehensive analysis of the evolution of corporate heritage. More importantly, this research aims to propose the future directions and emerging themes in this field by investigating the recent highly cited papers, which can also be a guideline for practitioners, policy-makers, brand managers and consultants by offering the emerging important themes within the corporate heritage to allow them to translate this knowledge into the effective brand and corporate strategies. In the light of the above argument, this research attempts to answer three main questions: (1) what are the main research area(s) that have had impacted on the evolution and development of the ‘heritage’ domain? (2) what are the main research groups that have impacted heritage field and its core over time? And (3) what are the promising areas and concepts that have impacted on the recent development of the heritage research?

Based on the research questions and the Clarivate Analytics Web of Science Core Collection (WoS) database, this paper particularly aims to (a) evaluate the intellectual foundation of corporate heritage in the business and management domain between 2006 and 2019, (b) better understand and present the evolution of the research domain based on a number of analyses undertaken, (c) propose future advancements and emerging aspects of corporate heritage. This study provides two main contributions to the corporate heritage domain. Firstly, the research offers an integrative knowledge over the corporate heritage construct, by using bibliometric analysis; presented by a theory-driven qualitative overview. Analysing the literature is conducted by categorising prior literature in some fashion; trying to summarise the design, methodology, thematic area, scope of the literature and can have some guideline for further development on a topic (Samiee and Chabowski 2012). However, such scholarly attempts are subjected to lack of rigour and cannot provide an integrative understanding of the research domain (Zupic and Čater 2015). Subsequently, the following research possesses mechanism from both qualitative and quantitative perspective. The applied approach in this research identifies a theory and method-based overview over the corporate heritage domain to provide an integrative understanding of corporate heritage and base on, offer fruitful future avenues for further studies in the domain. Evaluating the corporate heritage domain reveals two main theoretical main streams in the corporate heritage field. Then through employing the bibliometric analysis, we depict an integrated understanding of the corporate heritage territory. Secondly, by adopting the Kuhn (1996) point of view (future research is shaped upon past and current studies), this research provided an integrated development path for corporate heritage. This detailed and distinct method has not yet been used in corporate heritage studies.

In the following sections, we present the theoretical foundations of corporate heritage in business and management. Then, we elaborate on the bibliometric research methods, expanding on each case study in detail, followed by the results and the contribution of each study. Finally, we will introduce and analyse the findings, along with proposing a future framework where the current trends and suggestions for future research will be considered.

1. **Conceptual foundations of ‘heritage’**

The heritage drawn as the part of *corporate brand identity* in one of the earliest works in business and management domain (Urde et al. 2007). Also, as highlighted by Balmer et al. (2009), there is a significant number of scholars in the literature emphasising “corporate heritage brands” (Balmer 2009, Urde et al. 2007), while another stream of research conceptualises heritage as a valuable marketing construct which can revive the history of a particular brand and evoke its cultural and personal associations (Brown et al. 2003; Dion and Mazzalovo 2016). Therefore, the two research domains can be seen as convergent and divergent at some point, given that they are both overlapping and diversified throughout the literature.

As a result, in order to provide a more comprehensive understanding of ‘*heritage’* in business and management domain, as well as the evolution of both conceptualisations, we analyse the differences and similarities between them, as these might allow us to provide more objective and unbiased rigorous quantitative approach to the literature review without carrying a specific scholarly stance on ‘heritage’. In our bibliometric analysis, we will address both constructs in order to have a broader understanding of past literature and a more advanced understanding of their future advancements.

As the corporate heritage and brand heritage are interrelated, prior to conduct analysis, we find it important to discuss the difference between the two concepts. While in corporate heritage scholars investigate the role of “augmentation, valorization, reinterpretation and appropriation of the past” (Balmer and Burghausen, 2019, p. 219), brand heritage refers inherently to the past (Balmer et al. 2011, p. 1539). Accordingly, the concepts are different in terms of their definition in the literature as well. Balmer and Burghausen (2014) defied corporate heritage “as all the traits and aspects of an organisation that link its past, present, and future in a meaningful and relevant way” (p. 394). In contrast, brand heritage is defined as “a dimension of a brand’s identity found in its track record, longevity, core values, use of symbols, and particularly in an organisational belief that its history is important” (Pecot and De Barnier 2017, p. 72), and it suggests that continuity of organizational memory through the continuity of a company and its business among past, present, and future (Martino and Lovari, 2016; Sasaki et al., 2020). Brand heritage is an extrinsic attribute of brand identity (Bargenda, 2020; Pecot et al. 2019) which can be conveyed through different marketing means such as year of establishment (Pizzi and Scarpi, 2019) or heritage stores (Dion and Borraz, 2015). Table 1 presents the concepts related to corporate and brand heritage introduced by scholars over a decade.

**<<<Insert Table 1>>>**

From a theoretical perspective, researchers have also investigated different theoretical approaches to investigate each concept. A qualitative theory-driven overview over the concepts suggests theories that have been mainly applied to brand heritage can include social identity theory (Balmer and Burghausen, 2015; Balmer, 2017; Kessous and Florence, 2019; Wielsma and Brunninge, 2019) and self-categorization theory (Balmer et al., 2020, He and Mukherjee, 2009). On the other hand, the related theories associated with corporate heritage predominantly include corporate heritage sustainability theory (Balmer and Balmer 2013), and mead theory of past (Balmer and Chen 2016), and corporate heritage social identity theory (Balmer and Burghausen 2015; Sammour et al. 2020). Additionally, from the methodological perspective, while the corporate heritage studies tend to be more conceptual, brand heritage studies are more empirical. As such suggests that more and brands have been able to develop a genuine brand heritage (Chaney et al. 2018). The next section will elaborate the theoretical foundations of corporate heritage based on the literature in business and management domain.

1. **Theoretical foundations of corporate heritage**
   1. *Corporate heritage sustainability theory*

In one of the conceptual attempts made in Balmer (2013)’s highly influential papers towards outlining and contextualising corporate heritage domain, Balmer (2013) tried to enunciate the so-called “provisional” theory: *corporate sustainability theory*. The theory itself has been derived from two other management theories, namely the resourced based view of the firm theory (Grant, 1991) and corporation theory (Prahalad and Hamel, 1990). According to Balmer (2013) one can confer that such an area displays a rather substantial potential and can thus provide an area for postulating a theoretical articulation.

To be more precise, Balmer (2013) refers to the corporate heritage sustainability theory when he discusses a company having a considerable existence, organisational endurance, and stable company capabilities, “these benefits can be multiple and wide-ranging and can relate to what a firm makes, does, and represents, especially in relation to broad identity terms vis-a`-vis the organisation’s social, cultural, territorial and temporal associations among others” (p. 315). As Balmer (2013) emphasises, even though the theory itself is established and conceptualises the corporate heritage traits, it needs to be further examined by scholars for them to achieve a robust understanding of its rationale and underpinnings.

* 1. *Mead’s theory of the past*

Another theoretical effort of conceptualisation has been made by Hudson and Balmer (2013), who tried to associate the theory of the past previously conceptualised by the sociologist G. Herbert Mead to the notion heritage brands and consumer behaviour practices. Hudson and Balmer (2013) specifically aspired to unveil the reasons of corporate heritage brands, particularly one of its facets, history, and exhibit its influence on consumers. Through Mead’s theory of the past, Hudson and Balmer (2013) proposed a four-dimensional typology of brand heritage concept, comprising of structural heritage, mythical heritage, reconstructed heritage and implied heritage. Based on the application of the Mead’s theory, Hudson and Balmer (2013) proposed a refine definition of corporate brand heritage as “an approach to corporate marketing that involves reference to the past. It encourages the engagement of consumers with the history of the brand, or the engagement of consumers with history through the brand” (p. 357).

* 1. *Social identity theory*

By being initially proposed by Tajfel and Turner (1979), social identity theory proposes an understanding on how and why individuals consider themselves as a part of a certain group, hence, being distant from others. Based on this explanation, the theory simply assumes that the sense of self-worth and self-identification can be evaluated based on the group/community/category that the individual belongs, therefore can alter the attachment towards the group, and bond with others within the group as a result of increasing similarities. According to the theory, when there is a stronger affiliation to the attributed social group/community/category, it allows group itself to control individuals behaviour and perception (Hogg and Abrams, 1988)

Being one of the often-highlighted theories within the heritage domain, social identity theory has been employed both corporate and brand heritage areas by scholars in the last decade (Balmer and Burghausen, 2015; Balmer, 2017; Kessous and Florence, 2019; Wielsma and Brunninge, 2019) considering the fact that corporate heritage organisations as well as brands carry meaningful identity-related values which in turn allow individuals, organisations or corporations to have a ‘self-identification’. This theory has been considered as a useful link between “corporate marketing and organisational behavioural disciplines” (Balmer, 2019; p. 1467).

* 1. *Self-categorization theory*

By being linked with social identity theory (Tajfel and Turner, 1979), categorization theory has also been employed into the heritage domain as it also attempts to explain “how employees define themselves in the context of their work organization” (Balmer et al., 2020, p. 629). To simply put, according to the self-categorisation theory, within the individual’s self-concept, there are two identity types, which are personal identity and social identity (He and Mukherjee, 2009). Therefore, this theory articulates that when an individual define himself within the personal identity, for example “consumer-company identification”, according to Balmer et al. (2020), it brings the social identification along with the personal identity, which can be “corporate-brand identification” (p. 629).

1. **Bibliometric citation analysis of the literature**
   1. *Description of sample*

Data was obtained through ISI Web of Knowledge, a comprehensive database and a multi-disciplinary research platform frequently cited as a *‘reliable and comprehensive bibliographic database’* (Batistič and der Laken 2019; Kristensen 2018). ISI Web of Science was chosen as the citation database, since it allows researchers to access a variety of research tools for a rigorous bibliometric analysis such as cited reference and citation analysis (Levdesdorff et al., 2013). In the light of the scholars’ recommendation (e.g., Chabowski et al., 2010, 2013, 2018; Merigó et al., 2015; Rey-Martí, Ribeiro-Soriano, and Palacios-Marqués, 2016; Zupic, and Čater, 2015), this study has used Web of Science as a citation database.

Since our aim using this bibliometric approach was to provide a more comprehensive coverage of research domain, we considered ‘brand heritage’ and ‘corporate heritage’ to be the *main* keywords of this study. Aligned with our research aims and objectives, we thus extracted publications from two relevant domains: business and management. The reason behind choosing ‘brand heritage’ and ‘corporate heritage’ as keywords for the following reasons: as the domain itself is highly dynamic and multifaceted, heritage has frequently used within different disciplines such as architecture (Harrison, 2013), cultural studies (Bryne, 2008), and history (Lowenthal, 1998). Noteworthy, the term “heritage” in scholars work does not, necessarily, suggest that a researcher meaningfully address the field as in this article is referred to corporate heritage. Therefore, consequently, in order to avoid any inadvertent biasing in our findings because of elaborative conceptual understanding of heritage, and cover entire heritage literature with appropriate keywords, all the articles in the heritage domain were reviewed by three experts in the domain to make sure that the selected articles are related to the investigate domain (Chabowski et al., 2011, 2013, 2018; Wilden et al. 2017). Through reviewing the literature, experts agreed on using ‘brand heritage’ and ‘corporate heritage’ as appropriate keywords.

* 1. *Methodology*

In the current paper, we employed various bibliometric analysis methods, namely multi-dimensional scaling, citation analysis, and co-occurrence network. During the citation analysis, we implemented different citation networks such as keywords, articles and co-citation. These methods will be elaborated in detail later in the paper.

After the selection of appropriate research keywords, the standard procedure requires the selection of the scope of the study for the sake of robustness and appropriate representation of the research domain. In relation to the criterion of the document type, we selected journal publications and excluded any other type such as book reviews, editorials, reports or other indirect content, on the grounds that journal articles are considered to be better and rigorous representations of the selected research domain (Foroudi et al. 2020; Kristensen 2018; Zupic and Čater 2015), and because journal articles can provide a more structured research sphere rather than any other published work (Kristensen 2018). Our approach resulted in retrieving 78 articles with 941 citations in 50 journals from both the business and management domain, considering the overall period of 2006-2019.

The raw data was extracted in *October 2019.* It is not surprising that among the data the most cited articles have been published in leading journals, the great influence of published journals in the Journal of Brand Management is noteworthy (Figure 1). Among these publications, the multiple contributions of Balmer and Burghausen as the main contributing authors is noteworthy. Additionally, the data shows a steady increase in the number of scholars who have been working on the corporate heritage domain. However, as it is shown in Figure 2, there is a sharp rise in the number of scholars working on the corporate heritage topic in 2015. Among the scholarly published articles, the work of Burghausen and Balmer (2015) on exploring five themes related to corporate heritage domain; Cooper et al. (2015) has conducted a longitudinal-retrospective study design of two corporate heritage brands; and Schroeder et al. (2015) on customer responses to cultural heritage brands are notable.

**<<Insert Figure 1 and Figure 2>>**

**Study 1. Citation analysis**

As a first step, we employed co-citation analysis to identify the structure of the intellectual foundation of the research domain; more specifically, the co-citation allows researchers to identify the most cited published documents in the field, the key concepts and interrelationship of the research published within the particular research domain (Small 1973). As emphasised by Batistič and der Laken (2019), due to its dynamic nature, co-citation analysis allows researchers to identify the changing theories, backgrounds and paradigm shifts of a research domain historically (Pasadeos et al., 1998). It also uncovers the most cited works of the research domain and allows researchers to identify the intellectual structure through the influential works within a research domain, and this is why it has been regarded as one of the most effective bibliometric analyses throughout a long period of time (Pasadeos et al. 1998).

To ensure robustness and rigorousness through the co-citation analysis, the standard protocol has been followed (Zupic and Čater 2015); therefore, while defining the core material of the research domain, the published works and published work titles, abstracts, keywords were thoroughly investigated by the authors independently. Therefore, by following the standard procedure of co-citation analysis, the published work has included in the study if the selected keyword has been found in (1) publication title, (2) publication abstract, (3) publication keywords or (4) publication reference identifiers (Clarivate Analytics, 2017).

As citation analysis has been implemented to identify the most influential works of the specific research domains, even though Fornell and Larcker (1981), for instance, appears with a high citation frequency identified within the most highly cited papers, Fornell and Larcker (1981) have excluded from our analysis due to the fact that it is not related to corporate heritage. More precisely, Table 2 presents the most highly cited publications on corporate heritage domain. Table 3 and Table 4 offers a detailed overview on the highly cited papers in corporate heritage and brand heritage domain by presenting their motivation, theories used, definition of key concepts, methodology, analysis, key findings and limitations.

**<< Insert Table 2>>**

**<< Insert Table 3>>**

**<< Insert Table 4>>**

*Multi-dimensional scaling*

Being one of the most applicable quantitative analysis methods to different disciplines from marketing to physics (Živadinović 2011), multidimensional scaling (MDS) - also called ‘perceptual mapping’ (Živadinović 2011) - refers to a quantitative analysis technique that is used to identify similarities and dissimilarities of objects, or ‘spatial relationships’ (Rounds and Zevon 1983) in a multi-dimensional space. Therefore, in our study, we performed MDS analysis to represent the corporate and brand heritage research domain used by co-citation data as an indicator of proximity between the most highly-cited articles. To identify the proximity between the most highly-cited articles by MDS analysis, we used *IBM SPSS for Mac v.25.*

The higher number of co-citations, the closer the proximity between works. In order to identify the good model fit, we followed the common practice adopted by scholars (see, for example, Chabowski et al. 2018; Ramos-Rodríguez and Ruiz-Navarro 2004), where goodness-of-fit between .10 and .20 were considered good, above .20 was considered poor and 0 was considered to be a perfect fit. For our MDS analysis, our goodness of fit was found to be .025, which indicates good model fit to the data. In order to identify the groups which, carry similar research objects representing the whole group (Machado et al. 2011), we used Euclidean distance of .25 (Hair et al., 1998). The Euclidean distance allows scholars to provide the optimum number of research groups. Our MDS analysis demonstrates more excellent shared knowledge between different studies. By using a maximum standard of .25, the results in Figure 3 revealed five well-defined research groups incorporate heritage studies.

The five groups comprised through multidimensional scaling are as follows: Group 1: The Foundations of Corporate Heritage (V2 & V11), Group 2: Corporate Heritage Marketing (V3 & V5), Group 3: Brand Heritage (V3 & V10), Group 4: Brand Authenticity (V6 & V15), and last, Group 5: Heritage Brands (V9 & V17 & V18). These five groups can offer a complete insight into the corporate and brand heritage knowledge structure. Figure 3 indicates the multidimensional scale, the spatial proximity of published works and indicated groups.

**<<Insert Figure 3>>**

To begin with, *Group 1* composed two articles; Balmer (2011) and Hudson and Balmer (2013). Group 1, i.e. The foundation of corporate heritage demonstrates the necessity of topics related to the theoretical roots of corporate heritage concept, and its difference to similar related constructs (mainly *nostalgia*). In his paper, Balmer (2011) scrutinises the heritage from a corporate perspective and investigates the taxonomy of *tradition, custom, nostalgia, iconic branding, retro branding, heritage tourism, melancholia,* appearing to converge to the concept of ‘heritage’. Then, with the corporate level investigation of aforementioned constructs, Balmer (2011) revises the *heritage* in corporate level as well as its meaning and propose a framework. The study further investigates ‘heritage’ identities within Swedish and British Monarchy to empirically validate the corporate heritage identity framework. The studies of Hudson and Balmer (2013) provides the theoretical foundation of the corporate heritage construct based on Mead’s theory of the past. In line with Balmer (2011)’s work, Hudson and Balmer (2013) also proposes a framework for corporate heritage brands, where they articulate the construct with four dimensions, which are structural, reconstructed, implied and mythical heritage.

*Group 2, Corporate Heritage Marketing,* also composed two influential articles: Balmer (2013) and Blombäck et al. (2009). By anchoring the topic of corporate heritage, research focusing on corporate heritage marketing (Group 2) tries to explicate the notion of corporate heritage communication notion. In his paper, Balmer (2013) aims to provide an enhanced understanding on the ‘corporate heritage’ domain by presenting a clarification of corporate heritage, corporate heritage brands, developments in corporate marketing and a snapshot reflection to the leading influential articles on corporate heritage canon. In this paper, Balmer (2013) argues the narrow-sightedness of scholars by frequently investigating the ‘heritage’ a notion from past (e.g., heritage sites, heritage environments) and not taking into consideration of the fact that it is being “living-entities” (Balmer, 2013; p. 295). Balmer (2013) claims that corporate heritage can be ‘covert and tacit (heritage manifestations are not, perhaps, easily identifiable and are not communicated externally) (p. 294)”.

On the other hand, when it comes to corporate heritage brands, Balmer (2013) points out brands and their renowned corporate heritages such as Rolls Royce- to remind the complexity of corporate heritage brands by owning plural entities within their corporate heritage and address some potential problems; for example, being ‘ignored’ when it comes to their corporate identity. In the same vein, by looking from corporate marketing perspective, Blomback and Brunninge (2009) aims to unveil how and why historical references- in relation to heritage are used as a communication tool for corporate marketing. Even though the paper presents empirical results through interviews, observations and archival studies, one layer of the paper offers theoretical insights on corporate identity, corporate branding, aligned with Balmer (2013)’s paper. Blomback and Brunninge (2009) offers four empirical illustrations along with the conceptual discussions to examine the role of historical references to the accumulation of corporate identity.

*Being linked to Group 2, Group 3 (Brand Heritage)* consists two influential papers: Balmer (2013) and Hudson (2011). The papers overall portray the relationship between the historical status of firms and their identity; brand heritage has been illustrated and validated in this group. In this group, papers empirically investigate the ‘brand heritage’, where Balmer (2013) investigates the Swiss and British Monarchy, Hudson (2011) investigates Cunard Line- one of the most renowned ocean liner brand, dated back to 1839. With these two empirical studies, authors inherently aim to investigate the concept of brand heritage and its narrative within corporate identity and associations enforced among consumers throughout the time.

Fourth*, Authenticity (Group 4)* consists two articles Brown et al (2003) and Napoli et al. (2014). The papers mainly shed light on the significance of authenticity in heritage brands. In more detail, Napoli et al., (2013) put effort on the development of a consumer-based brand authenticity (CBBA) scale to extend further the notion of brand authenticity, in order to aid managers to increase the efficiency of strategic communication as there is a need for desire to ‘what is authentic’ (Napoli et al., 2013, p. 7). Aligned with the need for ‘authentic’, ‘nostalgia’ and ‘craftmanship’, Brown et al. (2003) investigates the retro brands through *New Beetle* and *Star Wars,* and their prominence, revival and increasing exemplars within marketing practice.

Finally, *Group 5, Heritage Brands* consists three paper: Hakala et al. (2011), Urde et al. (2007), and Wiedmann et al. (2014). This group genuinely investigates brand heritage from multiple perspectives with different methodological approaches. As such, Wiedmann et al. (2011) investigates the antecedents and consequences of brand heritage with a focus on the automotive industry, by using partial least square (PLS) based path modelling approach. With this objective, the paper aims to offer a better insight to ‘heritage’ of a brand and its drivers as well as its outcomes. Hakala et al (2011) on the other hand, aims to operationalise the cultural heritage and brand heritage as well as present their complex interaction as they can be interlinked when it comes to a particular brand’s heritage and the cultural heritage of a target country. By looking the concept of ‘heritage brands’ from a practical perspective, Urde et al. (2007) aim to describe “how to identify the heritage that may reside in a brand and how to nurture, maintain and protect it, particularly through the management mindset of brand stewardship to generate stronger corporate marketing” (p. 4).

In addition, the comparison of the ungrouped and grouped articles identified in Figure 3 can provide the basis for comprehending the nature of both horizontal and the vertical dimensions of corporate heritage studies. First, the position of studies on the top of Figure 3 relating to the authentic marketing (e.g. tourism and wine industry) (according to Grayson and Martinec 2004, Festa et al. 2016) shows the importance of authentic marketing in the corporate heritage research domain. Along these lines, the bottom of the Figure 3 is linked to the customer response to the marketing of the brand (known as ‘brand equity’) (Keller 1993). The article on the right side of the Figure 3 focuses on the topic of brand authenticity (Leigh 2006). In this vein, the article on the left side of the Figure 3 emphasises on the monarchy brands (e.g., Swedish Royal Family) (Balmer et al. 2006) as an authentic brand. Table 5 indicates a summary of the groups, topics and future directions proposed by the articles positioned in the particular groups.

**<<Insert Table 5>>**

**Study 2. Network visualisation**

*Co-occurrence network*

Graphical representation of the bibliometric maps has been known due to their functionality in enhancing the understanding of nodes and links between publications and they recently started gaining more attention by scholars (Gomes et al. 2018, Sakata et al. 2013, Batistič and der Laken 2019). Therefore, a co-occurrence map has been performed to allow researchers identify and visualise the research domain, as well as understand the interrelationships and the key concepts. After performing co-citation analysis and multi-dimensional scaling on the most highly cited articles on the research domain, the aim of presenting the co-occurrence map is to represent the key concepts, terms and their relationships throughout the evolution of the research domain. The co-occurrence network was performed by using VOSviewer software (for more details see www.vosviewer.com) (van Eck and Waltman 2010). Towards constructing the co-occurrence network, we used VOSViewer’s text mining functionality, which allows research based on the textual data from titles and abstracts of documents (van Eck and Waltman 2014).

Figure 4 presents key concepts, where five has been considered the minimum number of occurrences; 108 key concepts have met the threshold, and 60 percent of the most relevant terms has been presented in the co-occurrence network from 2014 to 2018. The weights of the co-occurrences have been represented as intensified nodes. The strongest associations have been found in relation to corporate heritage brand, brand heritage, heritage identity, identity, history, and authenticity. These findings constitute supportive evidence for citation analysis and multidimensional scaling results.

**<<Insert Figure 4>>**

Examining the evolution of the terms co-occurring over time from 2017 to 2018, a shift can be observed to more specific key concepts, such as perception, quality, logo, art, image, brand revitalisation, brand authenticity; however, drawing our attention to the dominant terms from 2014 to 2015, the key terms that prevail are corporate identity, nostalgia, authenticity, heritage identity. The reason behind this might be that the domain has been evolving in the recent years, whereas in the first periods of its development, the key concepts emerged from scholars whilst working on the conceptual studies.

**Study 3: Algorithmic Historiography**

Proposed by Garfield et al. (2003), the genealogic representation of a research domain allows researchers to identify the paradigm shift, the evolution of the research domain as well as the representation of historical development of the published works and the relationships that hold between them. Algorithmic historiography, with its basic principles, aims to identify a particular research domain’s “bibliometric antecedents and descendants of its principal, often primordial papers and authors” (Garfield et al. 2003, 401). By performing algorithmic historiography on our main published works (namely 78 articles with 941 citations in 50 journals from business and management domain considering the overall period of 2006-2019), our goal was to visualise the historiography of the corporate and brand heritage research domain, and exhibit how the key concepts, the relevant theories, and predecessors and successors in this particular research domain offer researchers a narrative point on understanding the paradigm shifts. Our algorithmic historiography has been conducted employing CitNetExplorer software (van Eck and Waltman 2014, Batistič and der Laken 2019).

While deciding the core publications, Garfield et al. (2003) propose to involve 5% of the core publication data; on the other hand, van Eck and Waltman (2014) suggest that scholars should identify the publications that are connected with other ten publications within the core data. Given that we have 78 published works in our core data having at least ten connections has not produced any comprehensive results for algorithmic historiography. As a result, we followed Batistič and der Laken (2019) in terms of conducting an iterative process to come up with an optimum result in terms of readability and meaningfulness of the historiography, and therefore we have ended up with 40 out of 78 publications.

The results in Figure 5 indicate that Brown et al.'s (2003) paper on retro-brands and retro-branding has been considered the first root of corporate heritage domain. In their work, Brown et al. (2003) referred to *brand heritage* as a marketing tool that aids bolstering the brand through its all cultural, historical, and personal associations. Another interesting point is that the algorithmic historiography demonstrated that the corporate and brand heritage domain had been evolved from only one root, as no cluster has been found in cluster analysis. Grayson and Martinec’s (2004) paper focused on investigating indexical and iconic authenticity. Followed by Grayson and Martinec’s (2004) paper, another root of the research domain can be considered Leigh’s (2006) paper investigating the meanings of authenticity within a specific brand context: MG, the British automotive company. Within the nostalgia roots of MG’s subculture, the paper conceptualises that “nostalgia underlies the association of an MG with the subculture’s collective memory of brand heritage” (p. 486).

**<<Insert Figure 5>>**

1. **Discussion** 
   1. **Citation Overview**

In the aggerate, the 18 most cited articles (shown in Table 2) in corporate heritage domain are authored by 33 researchers. Although our interest in the research domain had been addressed in these articles, an examination of author citation can offer an introductory view of the corporate heritage domain. By doing this, an author-based investigation can provide insight into the influence on the corporate heritage domain. With this in mind, Balmer in our sample is the most influential researcher on the corporate heritage domain. Balmer, Grayser, and Urde received 29 citations in total for our sample for three co-authored studies; as the initial works on corporate heritage (Balmer et al. 2006; Urde et al. 2007). The Balmer and Powel collaboration is another noteworthy co-authored research which has received 33 citations in our sample; placing emphasis on corporate heritage identity (Balmer et al. 2009; Balmer, and Powell, 2011; Balmer et al. 2011). In their two articles, Hudson and Palmer articles on corporate heritage received 22 citations (Balmer and Hudson, 2013; Balmer et al. 2011). Similarly, the two co-authored articles of Merchant and Rose on brand heritage as a marketing tool received 18 citations in our sample (Merchant and Rose 2013; Rose et al. 2016).

The present research was triggered by the need of identifying a clear pathway for further developing the corporate heritage concept. The co-citation analysis suggests that the concept of corporate heritage emerged and evolved through diverse and interdisciplinary research areas. To expand the concept of corporate heritage as a whole, a textual analysis was conducted, which unveiled that the evolution of themes shows the topic of corporate heritage is moving toward more systemic and dynamic views. Additionally, algorithmic historiography has been applied to identify and evaluate the paradigm shifts, as well as seminal works in the particular research domain.

The first observation regarding the most influential works, as presented in table 1, is the broad influence of related concepts that have shaped its foundation. It is not surprising for marketing scholars to investigate for seasoned responses and explanations to a certain set of research problems and questions outside the initial bodies of knowledge. As a matter of fact, in order to accommodate the research objectives, the research process stresses a form of searching and learning from external sources. Much similar to the same process that firms try to learn from their external resources to find the newest knowledge for their problems, researchers in corporate heritage domain seek to develop the domain by borrowing the relevant knowledge from other highly related disciplines. In the case of corporate heritage domain, a shocking finding is an extent to which the related concepts and constructs, such as brand heritage, have shaped the intellectual structure of the domain. In particular, the corporate heritage domain is influenced by the studies that have been developed in the related concepts such as brand heritage (Sammour et al. 2020).

The topic of corporate heritage foundation proved to be prevalent in the results, as highlighted by the emphasis placed on the foundation of corporate heritage (Group 1). This shows that a theoretical foundation which can advance the research domain is critical for proposing a framework for future corporate heritage research. In more details, Group (1) suggests that although the main focus of corporate heritage is related to past, there are other

corporate-related constructs which also studies, or as included in Balmer (2011); corporate heritage brands, customs, heritage identities, heritage marketing, heritage tourism, iconic branding, melancholia, nostalgia, retro branding, tradition. Also, based on this Group the researchers mark the importance of Maed’s theory in understanding such related constructs.

Secondly, although the topic of corporate heritage marketing (Group 2) stresses the importance of corporate heritage marketing, the emphasis is also placed on the marketing mix elements in the articles that are related to authentic products. For example, as already discussed in the paper, a brand positioning related to the product itself, its distribution place, pricing, promotion was identified to some extent in the multidimensional scaling results, hence, highlighting their importance within the relevant framework (Festa et al. 2016; Grayson and Martinec 2004). Importantly, Group (2) recognized and asserted the importance accorded to the past in shaping and influencing the identity trait in revealing the corporation. In a similar vein, Group (3) claims that in particular the heritage marketing domain, and more generally, marketing literature are grounded upon substantive scholarly writing on heritage tourism. Furthermore, Group 3 configuration suggests that in addition to the aforementioned marketing mix, historical references in corporate marketing have also been under investigation. However, the difference between the customer perceived heritage identity and the organisational heritage identity was under investigation in the articles put forward by Balmer (2009) and Hudson (2011).

Thirdly, the topic of authenticity as a positioning device was explored both for heritage brands and authentic brands. However, interestingly, in Group (4) Brown et al.’s (2003) paper have also been linked to the Napoli et al. (2014) in the MDS findings (Group 4) where in it brands with a sense history with their traditional customers, beliefs, and regions acquire nostalgic aura and distinctive identity which adds to their authenticity. Noteworthy, inasmuch as Brown et al. (2003) article in our findings, suggests that the term brand authenticity is a multifaceted construct and imbued with the perception of heritage (Burghausen and Balmer 2015), and heritage articulation can create value and be self-reinforcing valuable dynamic strategic changes, predominantly based on heritage branding (Santos et al. 2016)

Lastly, in bibliometric research, a research group consists of only two publications, whereas, a research clique contains three or more documents in a single group which can establish a solid foundation for future domain suggestions (Chabowski et al. 2018). In this regard, coincident with Group (4), Group (5) is a research clique with the main focus on the notion of a heritage brand. This research clique (Group 5) states that the heritage aspects of brands including track record, longevity, core values, using of symbols, and history as a promise to the customers that core values of the brand are genuine and authentic.

By evaluating both the corporate heritage well-established and recent articles, this temporal element of our study suggests the continuity of the corporate heritage research (Burrell 2003); hence, a more complete and comprehensive understanding of this research domain can result in advancing the knowledge base. Additionally, it can provide opportunities for advancing the theoretical underpinnings (Kuhn 1996). To achieve so, the most important fundamental components of research agenda were based on the corporate heritage structure. Then each aspect was linked together to propose future suggestions for the corporate heritage research.

Through applying different bibliometric method, which aims to connect journals, authors, and publications, we expose great possible for the quantitative validation of the concept of corporate heritage in published peer reviewed journals and to identify the domain categories and landscape. Based on the results, this study propose guideline for future researchers to conduct study in the field. Based on the objectives of our study and employing theory-driven qualitative approach, we (i) evaluated the intellectual foundation of corporate heritage in the business and management domain between 2006 and 2019, (ii) better understand and present the evolution of the corporate heritage domain, (iii) offers an integrative knowledge over the corporate heritage territory, (iv) propose future advancements and emerging aspects of corporate heritage. This study can be used as a guideline for scholars and researchers in the field of corporate heritage.

***Future suggestions***

The first future suggestion concerning corporate heritage that was identified in the current research was related to the corporate heritage foundation. Although previous researchers (e.g., Balmer and Hudson 2013; Burghausen and Balmer 2015; Rindell et al. 2015) have tried to extend the topic theoretically, still the topic needs more theoretical attention. In this regards, future researchers can make an attempt to develop the corporate heritage domain theoretically and apply new theories to the emerging domain of corporate heritage. Based on the aforementioned fundamental components of corporate heritage brands identified in the bibliometric approach. Our proposed future conceptualization is entailed in Figure 6, which also demonstrates the area that requires more attention from future scholars. Below the proposed future suggestions are discussed in detail.

**<<Insert Figure 6>>**

First, there have been relatively few research studies which evaluate simultaneously different corporate heritage branding. Different studies have investigated the role of historical references as a device of corporate heritage positioning (Burghausen and Balmer, 2014, Rindell et al., 2015, Wilson, 2017). Other researchers have examined the role of marketing mix (e.g., price, place) (Pecot et al., 2018, Wiedmann et al., 2014, Wilson, 2017). However, a more comparative assessment of which positioning is ideal for each particular product/service (e.g., automobile industry, higher education) is needed. Also, another recently emerged topic related to corporate heritage marketing mix is associates with the retro-marketing (O’Brien, 2018). Further analysis is necessitated for academics and practitioners to gain insights about the best-chosen strategy for retro-marketing services/products.

Secondly, the heritage branding orientation has been under investigation from two perspectives. The first set of researchers (Balmer 2011; Balmer and Burghausen 2018; Burghausen and Balmer 2014) focused on how firms can communicate their heritage identity though the afore-mentioned marketing mix. In other words, heritage branding orientation aims to facilitate the customer interpretation of the corporate heritage identity (Rindell et al. 2015). Previous studies mainly focused on detailed case study methodology and investigated the customer interpretation of brands for assessing the corporate heritage identity (Rindell et al. 2015). However, until nowadays, only Pecot and De Barnier (2017) have taken accessibility to customers as a starting point while investigating the customer interpretation of heritage brands.

Finally, the nature of authentic brands is particularly significant and should, thus, be examined. Even though Napoli et al. (2014) have analysed the implicit indicator of an authentic brand (Quality commitment, heritage, sincerity), Hudson (2011) suggested that value is also another important component of authentic brands. In that respect, a study conducted by Brunninge and Fridriksson (2017) suggested that heritage brands can conjure a picture of being a committed and responsible company by getting involved in sustainable supply chains.

**Limitations**

There are three main limitations reflected in the current study. First of all, before conducting the analysis and collecting the data, researchers contacted experts to develop a range of words for identifying the corporate heritage articles; given the nature of the terms used in this study, the MDS analysis and co-citation analysis could have identified different results had a different set of keywords been opted for. In other words, choosing a different set of keywords could have yield different results depending on the extent of change in the sample. It is highly recommended that future studies are conducted with the use of different keywords to explore how results may differ from the current results. Additionally, future researchers are encouraged to apply other forms of social network analysis, such as HCA, to conduct a two-mode network evaluation. Such findings can add supplementary and interesting results to the development of the corporate heritage domain.

Finally, bibliometric analysis researches tend to have backwards looking, with a main focus on the most cited references. Consequently, the analysis of the field is mainly based on the specific set of most co-cited studies. Although such highly co-cited articles represent the most influential works, they do not represent the field entirely. Therefore, more recent articles can also prove to be equally important, and help researchers identify new paths for future studies in the corporate heritage research sector.

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**Table 1: Concepts related to corporate and brand heritage**

|  |  |
| --- | --- |
| **Brand heritage** | **Hakala, Latti, Sandberg (2011)**  Brand heritage is “a composite concept incorporating the history of the brand in numbers of years of operation and the power of the brand story over time, as well as the consistency and continuity of the core values, the product brands and the visual symbols” (p. 454). |
| **Urde, Greyser, Balmer (2007)**  A dimension of a brand’s identity found in its track record, longevity, core values, use of symbols, and particularly in an organisational belief that its history is important. (p. 4). |
| **Wiedmann, Hennings, Schmidt (2014)**  “Brand heritage embraces all the time frames from the past to present times and carries socially important values, the common heritage, from past epochs to contemporary contexts and even to the future.” (p. 206). |
| **Hudson (2011)**  Brand heritage is an emerging concept within the marketing discipline, which suggests that the historical status of older companies is often explicitly linked to their brand identity and consumer appeal (p. 1538). |
| **Merchant and Rose (2013)**  “The brand's early roots add sincerity and differentiation, especially as the brand's history and origin are re-interpreted in contemporary times” (p. 2620) |
| **Rose, Merchant, Orth and Hortstmann (2016)**  Brand heritage represents “a value proposition to consumers. Successful heritage brands position themselves based on their past history and relate that history to current circumstances” (p. 937). |
| **Corporate heritage** | **Balmer (2013)**  “Corporate heritage subsists in temporal strata, that is, in multiple time stratums (Balmer, 2011a).” |
| **Corporate brand heritage** | **Hudson and Balmer (2013)**  Corporate brand heritage is “an approach to corporate marketing that involves reference to the past. It encourages the engagement of consumers with the history of the brand, or the engagement of consumers with history through the brand” (p. 357). |
| **Corporate heritage identity** | **Burghausen and Balmer (2014)**  Corporate heritage identity refers to “a category of organization where particular identity traits of an organization has endured and meaningfully link its past, present, and prospective future.” (p. 2312). |
| **Balmer (2011)**  “Corporate heritage identities refer to those institutional identity traits which have remained meaningful and invariant over the passage of time and, as such, a corporate heritage identity is viewed as being of the past, present and future.” (p. 1385). |
| **Retro** | **Hakala, Latti, Sandberg (2011)**  Retro “is a marketing and advertising tactic that any company can apply: reviving old products or brand slogans, incorporating images of days gone by, rehashing and re-contextualising old ads and old cultural representations, and evoking any kind of nostalgia associated with the past. (p. 448). |
| **Urde, Greyser, Balmer (2007)**  “It is branding related to a particular epoch and often with a nostalgic character,7 such as Volkswagen’s New Beetle.” (p. 22). |
| **Wiedmann, Hennings, Schmidt (2014)**  “Retro brands are based on the desire to evoke past events of a particular, definitive epoch when life was perceived to be simpler and much less stressful.” (p. 206) |
| **Balmer (2011)**  “Retro brands celebrate an idealised and – sometimes imagined – past, which is seen to be meaningful.” (p. 1385). |
| **Brown, Kozinets and Sherry (2003)**  “The revival or relaunch of a product or service brand from a prior historical period, which is usually but not always updated to contemporary standards of performance, functioning, or taste.” (p. 20). |
| **Nostalgia** | **Wiedmann, Hennings, Schmidt (2014)**  Nostalgic branding refers to the use of products as materializations of memories linked to a utopian past that never really existed.” (p. 206). |
| **Merchant and Rose (2013)**  “Vicarious nostalgia, also referred to as historical nostalgia, examines the experience of emotionally connecting to and fantasizing about experiences and associations from past era.” (p. 2620). |
| **Balmer (2011)**  “Nostalgia is concerned with the positive associations – the seeking of happiness – relating to the past. Such feeling of nostalgia can give an individual a sense of certainty and security.” (p. 1384). |
| **Hudson and Balmer (2013)**  It encapsulates an individual or group yearning for the past. It represents a sentimental cognitive recollection of yesteryear, or a penchant for objects or experiences that are associated with a prior era (p. 355). |
| **Heritage brand** | **Urde, Greyser, Balmer (2007)**  A positioning and a value proposition based on its heritage (p. 5). |
| **Wiedmann, Hennings, Schmidt (2014)**  “Heritage brands constitute a different branding category with its own set of defining criteria and necessitate a specific approach to effective management and leadership” (p. 206). |
| **Hudson and Balmer (2013)**  A heritage brand is a specific variant of this phenomenon, differentiated by an organisational commitment to heritage and a strategic position that emphasises the past. (p. 357). |
| **Iconic branding** | **Wiedmann, Hennings, Schmidt (2014)**  “Iconic branding becomes manifest at present and lives on the power of symbols and myths constituted in the present and spread by social subgroups.” (p. 206). |
| **Balmer (2011)**  Iconic brand refers to those brands which are culturally dominant and distinctive. |
| **Heritage marketing** | **Balmer (2011)**  Heritage marketing is a concept which is chiefly concerned with the heritage and tourism industry. |
| **Cultural heritage** | **Hakala, Latti, Sandberg (2011)**  “Cultural heritage of a country as a composite of the history and the coherence and continuity of the nation’s distinguishable characteristics.” (p. 483). |
| **Authenticity** | **Greyson and Martinec (2004)**  “Authenticity’s long-standing, persistent, and contemporary marketplace appeal.” (p. 296). |
| **Leigh, Peters and Shelton (2006)**  “Authenticity is central to consumer roles within virtually every subculture and communal consumption context” (p. 483). |

**Table 2. The most highly cited publications on corporate heritage domain**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Rank** | **Source** | **Title** | **Publication** | **Citation frequency** |
| 1 | Urde et al. (2007) | Corporate brands with a heritage | Journal of Brand Management | 20 |
| 2 | Hakala et al. (2011) | Operationalising brand heritage and cultural heritage | Journal of Product & Brand Management | 15 |
| 3 | Wiedmann et al. (2014) | Drivers and Outcomes of Brand Heritage: Consumers' Perception of Heritage Brands in the Automotive Industry | Journal of Marketing Theory and Practice | 14 |
| 4 | Brown et al. (2003) | Teaching Old Brands New Tricks: Retro Branding and the Revival of Brand Meaning | Journal of Marketing | 13 |
| 5 | Balmer (2011) | Corporate Heritage identities, corporate heritage brands and the multiple heritage identities of the British Monarchy | European Journal of Marketing | 12 |
| 6 | Hudson (2011) | Brand heritage and the renaissance of Cunard | European Journal of Marketing | 12 |
| 7 | Hudson and Balmer (2013) | Corporate heritage brands: Mead's theory of the past | Corporate Communications: An International Journal | 10 |
| 8 | Grayson and Martinec (2004) | Consumer Perceptions of Iconicity and Indexicality and Their Influence on Assessments of Authentic Market Offerings | Journal of Consumer Research | 10 |
| 9 | Balmer (2013) | Corporate heritage, corporate heritage marketing, and total corporate heritage communications | Corporate Communications: An International Journal | 10 |
| 10 | Keller (1993) | Conceptualizing, Measuring, and Managing Customer-Based Brand Equity | Journal of Marketing | 9 |
| 11 | Merchant and Rose (2013) | Effects of advertising-evoked vicarious nostalgia on brand heritage | Journal of Business Research | 9 |
| 12 | (Rose et al., 2016) | Emphasizing brand heritage: Does it work? And how? | Journal of Business Research | 9 |
| 13 | Balmer et al. (2006) | The Crown as a corporate brand: Insights from monarchies | Journal of Brand Management | 9 |
| 14 | Burghausen and Balmer (2014) | Corporate heritage identity management and the multi-modal implementation of a corporate heritage identity | Journal of Business Research | 9 |
| 15 | Blombäck et al. (2009) | Corporate identity manifested through historical references | Corporate Communications: An International Journal | 8 |
| 16 | Beverland (2006) | The ‘real thing’: Branding authenticity in the luxury wine trade | Journal of Business Research | 8 |
| 17 | Leigh (2006) | The Consumer Quest for Authenticity: The Multiplicity of Meanings Within the MG Subculture of Consumption | Journal of the Academy of Marketing Science | 8 |
| 18 | Napoli et al. (2014) | Measuring consumer-based brand authenticity | Journal of Business Research | 8 |

**Table 3: The highly cited papers in corporate heritage domain**

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Corporate heritage** | **References** | **Motivation** | **Keywords** | **Theories** | **Definition** | **Methodology** | **Analysis** | **Key Findings** | **Limitation** |
| Urde, Greyser, Balmer (2007) | To explore, investigate and define heritage as a part of corporate brand identity | brand stewardship, corporate marketing, monarchies, heritage quotient, core values  corporate brand,  Heritage brand,  track record | Grounded theory | Brand heritage is “an immersion of a brand’s identity found in its track record, longevity, core values, use of symbols, and particularly in an organisational belief that its history is important.” (p. 4) | Case study | Case study research of 20 brands in a multiple-case design has implemented where more than 30 interviews has been conducted | Five elements that identifies the presence of ‘brand heritage’ in a brand has been explored. Heritage has been determined as a significant concept for differentiation, value proposition, brand value as well as internal commitment. | NA |
| Balmer (2011) | To investigate the notion of corporate heritage through British Monarchy | Corporate heritage brands, Corporate heritage identity, Corporate image, business history, Corporate strategy, organisational change, Corporate marketing, Corporate identity, Monarchy, The British, Swedish Monarchy | NA | Corporate heritage brands refer to “a distinct category of institutional brand where there is a degree of continuity in terms of the brand promise as expressed via the institution’s identity, behaviour and symbolism” (p. 1385)  Corporate heritage identities refer “to those institutional identity traits which have remained meaningful and invariant over the passage of time and, as such, a corporate heritage identity is viewed as being of the past, present and future” (p. 1385) | Conceptual | NA | Corporate heritage identities are multi-layered, where they belong to past, present and future and it is a powerful notion as heritage belongs to groups’ collective memory |  |
| Hudson and Balmer (2013) | To explore corporate heritage brands in the lens of consumer behaviour, to clarify the concept of brand heritage | Authenticity, nostalgia, identity, heritage, brands, history, | Mead’s theory of the past | “Corporate brand heritage is an approach to corporate marketing that involves reference to the past. It encourages the engagement of consumers with the history of the brand, or the engagement of consumers with history through the brand” (p. 357). | Conceptual | NA | Brand heritage has conceptualised with four dimensions: mythical heritage, implied heritage, reconstructed heritage, and structural heritage, | NA |
| Balmer (2013) | To strengthen the domain of corporate heritage | marketing mix, Corporate communications, Corporate identity, Corporate branding, history, | Corporate heritage sustainability | Corporate heritage “subsists in temporal strata, that is, in multiple time stratums (Balmer, 2011a). As such, it is a powerful realisation of the juridical notion that organisations have the potential to exist in perpetuity: most organisations have this dimension written into their legal articles of association” (p. 291). | Conceptual | NA | The paper conceptually highlights the corporate heritage marketing domain and emphasises the latter realisation and recognition is needed | NA |
| Balmer, Urde, Greyser (2006) | To investigate monarchies through corporate branding perspective in the context of Swedish Royal Family | King of Sweden, Royal Family of Sweden, corporate brands, corporate brand management, Monarchies, corporate brand management, The Crown, heritage brands | NA | NA | Case study | Interview | By looking monarchy through corporate branding perspective, it has provided insights to manage brands with heritage, as well as institutions, organisations, universities and museums where the mindset is found similar. | NA |
| Burghausen and Balmer (2014) | To enhance the corporate heritage identity domain with a focus of British brewing industry | Corporate marketing, Corporate identity management, Corporate heritage, identity, Corporate heritage, Case study, Qualitative research | NA | Corporate heritage identity refers to “a category of organization where particular identity traits of an organization has endured and meaningfully link its past, present, and prospective future.” (p. 2312) | In-depth qualitative case study involving interviews and visual data | Inductive analysis | Corporate heritage identity dimension has been identified along with four management activities, five implementation patterns and strategies. | As this empirical study based on a case study, further research can focus on other industries and industrial contexts. |
| Balmer et al. (2009) | To explore the manifestation of corporate identity through historical references | Corporate branding, corporate identity, corporate communications, history | NA | NA | Case study | Interviews, participant observation | Since corporate identity is directly related with past, present and the future, for the internal/ external communication purposes the historical references should be questioned by managers to understand why and how they are used. | This study posits itself as conceptual supported with case study, where the empirical research is needed for validity. |

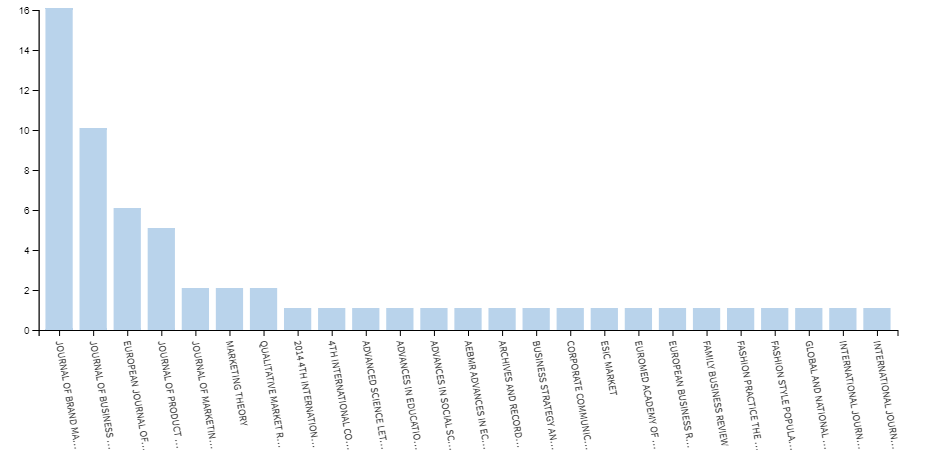
**Table 4: The highly cited papers in brand heritage domain**

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Brand heritage** | **References** | **Motivation** | **Keywords** | **Theories** | **Definition** | **Methodology** | **Analysis** | **Key Findings** | **Limitation** |
| Hakala, Latti, Sandberg (2011) | To operationalise brand heritage and cultural heritage, to assess the usability of suggested measures | International branding, Cultural heritage, Brands, Heritage | NA | Brand heritage is “one of the associations that marketers can use to differentiate their brands from those of their competitors, ultimately helping them to create a unique image for the offering.” (p. 448)  Cultural heritage of “a country as a composite of the history and the coherence and continuity of the nation’s distinguishable characteristics.”  (p. 450) | Case study | Four cases with four food product brands where interviews and fieldwork were involved | Through the case studies, brand and cultural heritage definitions were proposed | The research remained limited by being conceptual where future empirical research was encouraged |
| Wiedmann, Hennings, Schmidt (2014) | To investigate the drivers and outcomes of brand heritage in automobile industry context | NA | NA | Brand heritage “embraces all the time frames from the past to present times and carries socially important values, the common heritage, from past epochs to contemporary contexts and even to the future.”  (p. 206) | Partial least squares (PLS)–based path modelling approach | Survey with 458 consumers in Germany who are interested in cars | Credibility, bonding, continuity and orientation was found to influence brand heritage, which in turn affects brand image, willingness to pay and brand trust | The study has focused in automotive industry, to generalise the results, the study can be replicated. |
| Brown, Kozinets and Sherry (2003) | To develop a practical theory for retro brands by investigating Volkswagen and Star Wars as prominent examples of retro brands | NA | NA | NA | Netnography | Qualitative inquiry on data gathered through news-group messages and Websites | Four characteristics of retro brands (allegory, arcadia, aura, antinomy) has identified where the researchers deduced tat the social and cultural notions are imminent forces that influence consumer-brand relationship | NA |
| Hudson (2011) | To illustrate and validate the positioning of brand heritage through a historic cruise line: Cunard | Market position, Brands, Brand identity, Marketing strategy, Design, Business history | NA | Brand heritage is “an emerging concept within the marketing discipline, which suggests that the historical status of older companies is often explicitly linked to their brand identity and consumer appeal.” (p. 1538) | Historical research, Case study | Interviews, observation, secondary research | Brand heritage is found as a significant concept for corporate identity, differentiation strategy | As the study focused on one specific example, it cannot yield a generalisable conclusion. |
| Merchant and Rose (2013) | To empirically investigate the influence of advertising-evoked vicarious nostalgia in brand heritage | Nostalgia, brands, brand heritage, advertising | NA | Vicarious nostalgia, also referred to as historical nostalgia, “examines the experience of emotionally connecting to and fantasizing about experiences and associations from past eras (Stern, 1992).” (p. 2620) | Mixed method research design | Qualitative research (literature review, focus groups), quantitative research (online consumer panel with 265 participants in US)) | Emotions aroused by vicarious nostalgia has a positive influence on brand heritage | This study has investigated the particular concepts in US, other cultures can be used for the replication of the study. |
| Rose, Merchant, Orth and Hortstmann (2016) | To empirically explore influence of brand heritage on trust, emotions, attachment, commitment and purchase intentions | Brand heritage, branding, nostalgia, brand trust, brand attachment, Regulatory goal focus, | Regulatory focus theory | Brand heritage denotes “a value proposition to consumers. Successful heritage brands position themselves based on their past history and relate that history to current circumstances” (p. 937) | Mixed method research design | Qualitative research (interviews, focus groups), quantitative research (online consumer panel with 326 participants in US and Germany) | Brand heritage found to influence emotions and trust, which promotes emotions, trust, attachment and commitment therefore increase purchase intention | The study can be replicated other contexts, data also may not be representative so further research can be done to validate the research results. |
| Beverland (2006) | To explore the attribution of authenticity and the way of managing images of authenticity for commercial purposes in the context of wine production | Authenticity; consumer behaviour; branding; qualitative research | NA | NA | Case study | Interviews | Six attributed of authenticity (stylistic consistency, relationship to place, quality commitments. method of production, heritage and pedigree downplaying commercia) has been identified. | The study can be replicated other contexts, data also may not be representative so further research can be done to validate the research results. |
|  | Leigh, Peters and Shelton (2006) | To explore the meaning of authenticity in the context of MG brand | Brand community, brand heritage, existential authenticity, brand authenticity, subcultural capital, consumer subcultures; | NA | Authenticity is “central to consumer roles within virtually every subculture and communal consumption context.”  (p. 483) | Ethnography | Participant observations, formal interviews, informal conversations, and document reviews, | In the consumption context two types of authenticity have identified: self-efficacy, authenticity, and product symbolism | NA |
| Grayson and Martinec (2004) | To investigate consumers’ perception of authenticity, to identify different types of authenticity | NA | NA | NA | Mixed method research | Interviews with participants from two tourist attractions | Two types of authenticity cues have identified: iconic and indexical. | As the research has conducted at two similar touristic attraction, the further study could replicate the same study at other types of authentic contexts for generalisability and validity |
| Napoli, Dickinson, Beverland, Farrely (2006) | To develop consumer-based brand authenticity scale (CBBA) | Authenticity, Branding, Consumer behaviour, Scale development | Churchill’s scale development paradigm | Brand authenticity is defined as “a subjective evaluation of genuineness ascribed to a brand by consumers.” (p. 1091) | Mixed method research | To generate and refine scale items, and determining the underlying factors | Three first order factors have been identified for CBBA scale: commitment, sincerity and heritage | A broader context could be used for further scale development of CBBA |

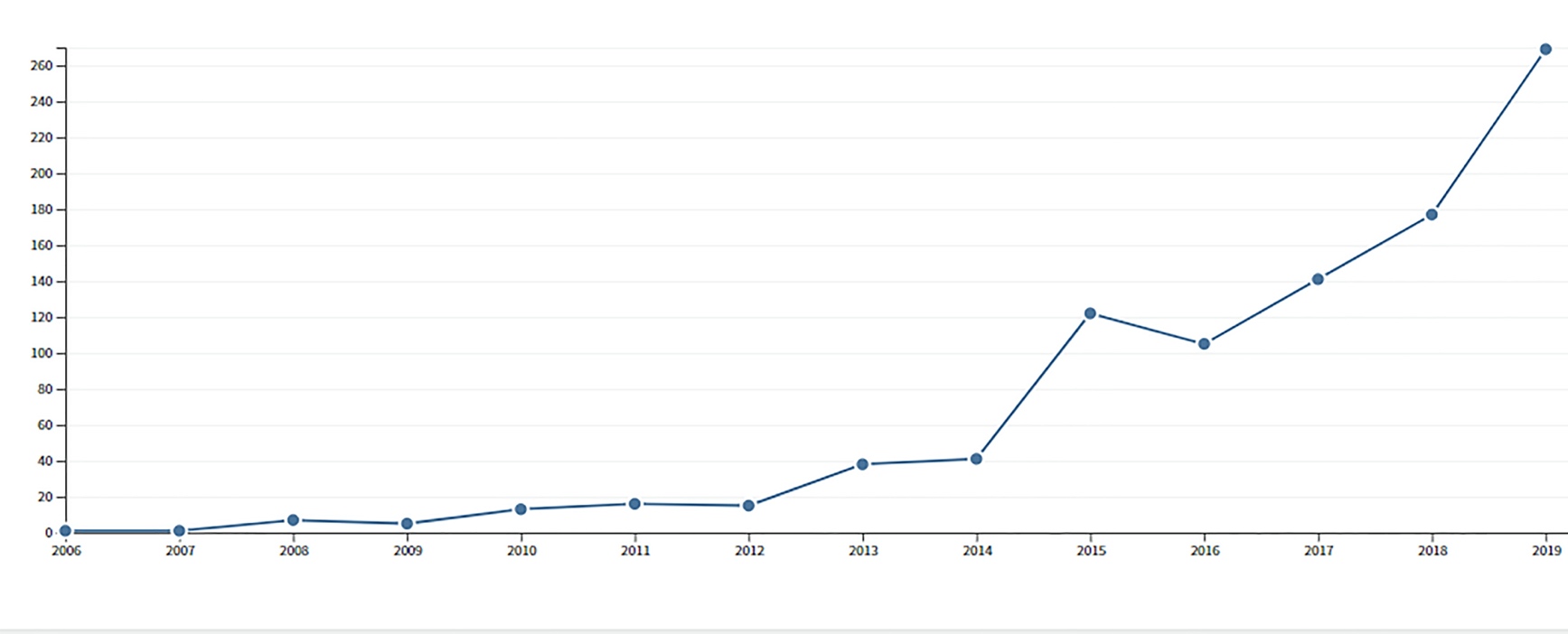
**Table 5. Multidimensional scaling and Group summaries**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Groups** | **Codes** | **Publications presented in the Groups** | **Methodology** | **Research objectives** | **Future directions** |
| **1** | V2 | Balmer (2011) | Case Study | Identify the nature of corporate heritage vis a vis other related constructs are positioned | Extending the concept of corporate heritage |
| V11 | Hudson and Balmer (2013) | Conceptual Paper | Conceptualising the response of customer behaviour related to corporate heritage brands | Extending the concept of corporate heritage |
| **2** | V3 | Balmer (2013) | Literature review | Outlining, explicating, and introducing the concepts of  Corporate heritage communication and corporate heritage marketing | Extending the concept of corporate heritage marketing |
| V5 | Blombäck et al. (2009) | Research paper | Determine how history can be used as a reference marketing and what is the outcome of such usage for brands | Extend the concept of company history to internal and external corporate communications |
| **3** | V3 | Balmer (2013) | Literature review | Introducing and explicating the corporate heritage marketing and total corporate heritage communications notions | Extending the concept of corporate heritage marketing |
| V10 | Hudson (2011) | Research Paper | Conceptualise, illustrate and validate brand heritage via Cunard Shipping Line | Extending the concept of brand heritage |
| **4** | V6 | Brown et al. (2003) | Case Study | Illustrating and animating of retro marketing by empirical studies over two predominant brands. | To investigate the role of brand communities in cocreating brand stories |
| V15 | Napoli et al. (2014) | Quantitative | Evaluation of brand authenticity through conducting a quantitative analysis | The methodological issues associated with validating the item measurements |
| **5** | V9 | Hakala et al. (2011) | Case Study | Undertake an operationalisation on brand heritage | As the brand heritage construct has been offered and operationalised, this paper offers scholars brand heritage where it needs to be further tested |
| V17 | Urde et al. (2007) | Conceptual paper based on various case studies such as Sweden Monarchy, Jaguar, BBC, IKEA, IBM. Patek Phillipe | Articulates the concept of heritage brands in the process of corporate branding | Strengthen the corporate level marketing with the context of heritage |
| V18 | Wiedmann et al. (2014) | Quantitative | Identifying the antecedents and consequences of brand heritage | Offer various research methods (e.g., mixture partial least square) to provide a better understanding of the path modelling |

**Figure 1. Source titles**

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**Figure 2. Annual distribution**



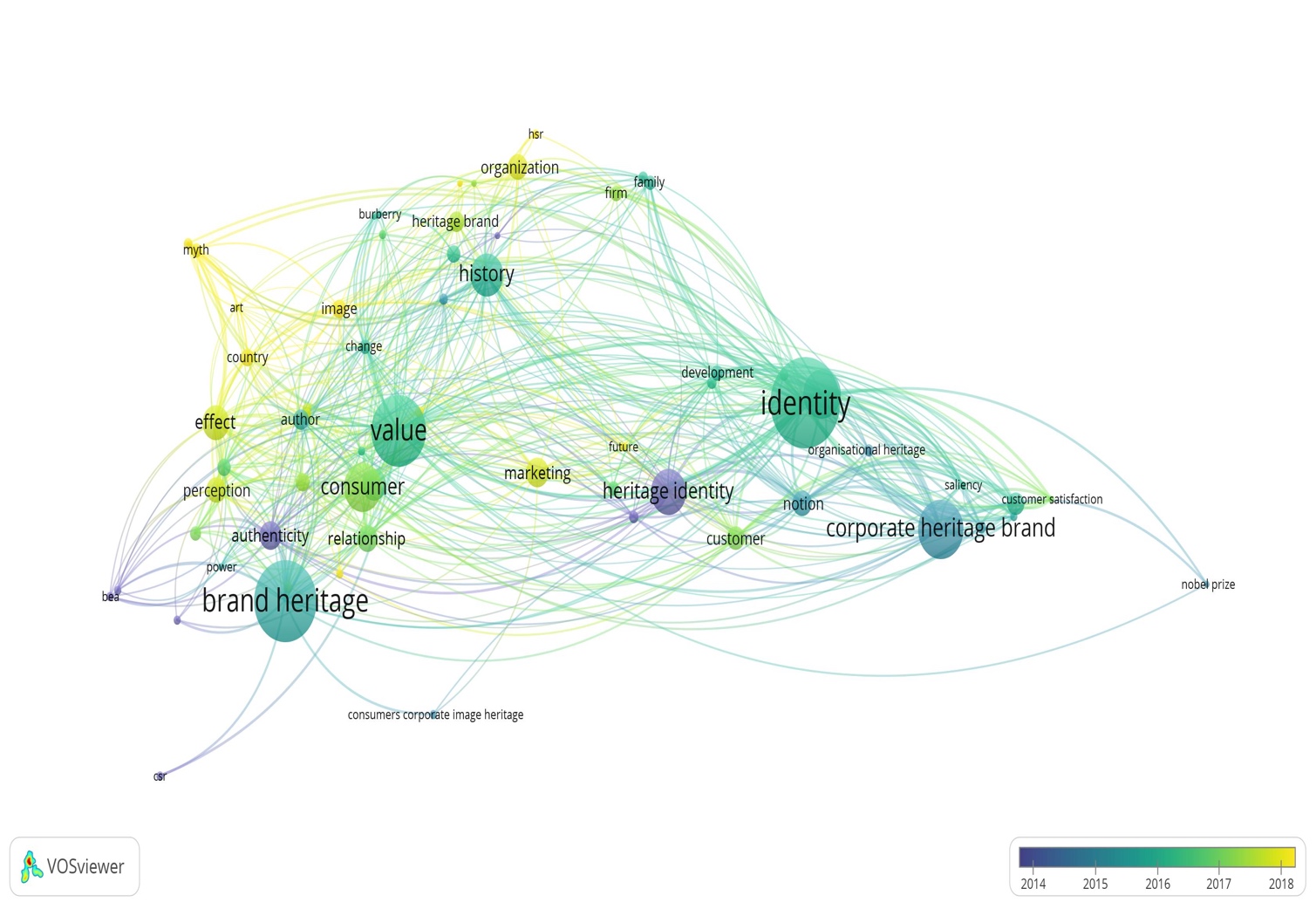
**Figure 3. Multidimensional scaling**



Stress value: .025; Standardized distance used: .25

V1=Balmer et al. (2006); V2= Balmer (2011);V3=Balmer (2013); V4=Beverland (2006); V5=Blombäck et al. (2009); V6=Brown et al. (2003); V7=Burghausen and Balmer (2014); V8=Grayson and Martinec (2004); V9=Hakala et al. (2011); V10=Hudson (2011); V11=Hudson and Balmer (2013); V12=Keller (1993); V13=Leigh (2006): V14=Merchant and Rose (2013); V15=Napoli et al. (2014); V16=Rose et al. (2016): V17=Urde et al. (2007); V18=Wiedmann et al. (2014)

Group 1 (V2 & V11): The Foundations of Corporate Heritage; Group 2 (V3 & V5): Corporate Heritage Marketing; Group 3 (V3 & V10): Brand Heritage; Group 4 (V6 & V15): Brand Authenticity; Group 5 (V9 & V17 & V18): Heritage Brands

**Figure 4. Co-occurrence network**

**Figure 5. Algorithmic historiography**



**Figure 6. Future model**

