**Brand heritage as a temporal perception: conceptualisation, measure and consequences**

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This research looks at the concept of brand heritage as a branded representation of the past and its influence on cognitive and affective responses. Although numerous items of research mention brand heritage, the subject still lacks conceptual clarity. This paper aims to address this gap and to build a scale measuring its perception by consumers. The literature review leads to a conceptualisation of brand heritage as the perception of a brand’s temporal management. Then, one qualitative and three quantitative studies facilitate the emergence and validate a three-dimensional scale of perceived brand heritage. A model demonstrates how brand heritage enhances brand credibility and personal nostalgia. This paper contributes to the apprehension of change and continuity in brand management, with potential extensions to other disciplines.

Summary Statement of Contribution: This paper defines brand heritage as a purely temporal concept and builds a measurement scale in line with this conceptualisation. This is a contribution to the research on the management of the temporal dimension of brands. It can facilitate further empirical work on brand heritage. It can be adapted to other objects that are not brands in interdisciplinary research.

Keywords: brand heritage; timelessness; credibility; personal nostalgia; measurement scale; structural equation modelling

**Introduction**

In The Leopard, Lampedusa writes the famous quote: “If we want things to stay as they are, things will have to change”. Although it was not the intention, this maxim seems to apply well to some managers who work hard to adapt their brands to new trends, but work even harder to camouflage these changes behind an overall impression of continuity. Playing with consumers’ perception, they anchor their brand in an omni-temporal dimension (Balmer, 2011). Perceptions of change and continuity make our experience of time, and have an important role in consumer psychology (Bergadaa, 1990). Our research aims to contribute to this field by focusing on consumer perception of brand heritage salience in brand-related stimuli. We define brand heritage as a branded representation of the past, unifying past, present and future timeframes (Balmer & Burghausen, 2019; Pecot & De Barnier, 2017; Urde, Greyser, & Balmer, 2007). In times of insecurity and threat, individuals tend to look at the past (Sarial-Abi, Vohs, Hamilton, & Ulqinaku, 2017) and indulge in retro consumption (Brown, 2001). Marketing practitioners can use brand heritage as a resource, with the intention to influence consumers’ perceptions of the temporality of the brand (Balmer, 2011). Research has focused on the way managers use this resource at a corporate and product brand level (Burghausen & Balmer, 2014; Dion & Borraz, 2015; Hudson, 2011), while a smaller amount of work has looked at the way consumers perceive the salience of brand heritage in branding (Rose, Merchant, Orth, & Horstmann, 2016; Wiedmann, Hennigs, Schmidt, & Wuestefeld, 2011). Most importantly, existing works on the perception are not always clear at a conceptual level, regarding the difference of brand heritage to brand authenticity or nostalgia. This lack of conceptual precision can lead to measurement issues of construct validity, statistical conclusion validity, and internal validity (MacKenzie, 2003).

The present research focuses on consumers’ perceptions of brand heritage. It discusses the scope of brand heritage as a purely temporal concept (and therefore distinct from authenticity), based on a set of brand associations (distinct from the feeling of nostalgia). We develop and validate a measurement scale for perceived brand heritage with three temporal dimensions, and we show that brand heritage can influence cognitive and affective responses to the brand. The fours empirical studies are conducted in France, using primarily Fast Moving Consumer Goods brands, although study 4 extends the validity of the scale to other product categories (automobile, clothing and financial services). This perceived brand heritage scale as a temporal concept contributes to marketing research on past-related concepts through the clarification of the concept of brand heritage, the identification of three dimensions, and the distinction from nostalgia and authenticity. The results also shed light on consumers’ perceptions of change and continuity. They provide managers with a tool to measure the extent to which consumers perceive brands to combine stability, longevity, and adaptability, which might prove particularly useful for ageing firms facing disruptors (Marketing Science Institute (MSI), 2016). Finally, because of the versatility of its items’ formulation, the scale can also serve in other disciplines - such as environmental psychology or archaeology - for objects that are not brands.

**Change, Continuity and Heritage in Brands’ Perceptions**

The passage of time intrinsically relates to tensions between continuity and change. Human beings are able to experience time in its duration, based on perceptions of change in their direct environment; this is how we expand our temporal horizons, how we construct and distinguish the present from what happened before (past) and what will happen after (future) (Fraisse, 1984). Individuals have different attitudes to the different time categories they construct: the past, present or future. This can take the form of a cognitive bias that will over-emphasise the role of the past, of the present or of the future in their decision making (Zimbardo & Boyd, 1999). The present work focuses on the perception and reaction to heritage as a representation of the past in individuals’ environments.

In multiple disciplines, the concept of heritage designates a biased representation of the past in the present (Hartog, 2015; Lowenthal, 2015; McCrone, Morris, & Kiely, 1995; Smith, 1991). Marketing research builds on this and shows there is not an homogenous experience of the represented past (Goulding, 2001), as the consumer’s imagination plays an important role in the reception of the constructed discourses (Chronis, 2005). But the concept of heritage also emerges in relation with one of the current priorities for brand management research: the tensions between change and continuity (Keller, 2016).

Brand management researchers consider heritage as a concept aiming to study how managers use representations of the past. As with many brand concepts, heritage can be considered from an internal perspective as a resource, and from an external perspective as a set of brand associations. It is different from heritage branding, which is an organisational disposition leading to base product and corporate branding on corporate heritage (Santos et al., 2016). Authors also distinguish the concept of brand heritage from the category of heritage brands: the brands whose positioning is based on the activation of brand heritage (Urde et al., 2007). Brand heritage is first defined as a dimension of the brand’s identity, a resource that can be uncovered, activated and protected (Urde et al., 2007). To assess the presence and activation of this dimension, researchers look for a series of identifiable characteristics: the use of symbols in the promotional material, the existence of long-standing track records among the stakeholders, or the shared organisational interest for history, all of which indicate the salience of brand heritage in a company (Urde et al., 2007). In an empirical context, this view of brand heritage requires access to internal data. Referring to this definition and framework, other researchers look at the use of brand heritage in the positioning strategies: for example, the role of brand heritage in brand extension (Veg-Sala & Roux, 2014), in brand revival (Hudson, 2011; Santos, Burghausen, & Balmer, 2016; Testa, Cova, & Cantone, 2017) or in international expansions (Hakala, Lätti, & Sandberg, 2011). Others look at its implementation in the marketing mix: in retail (Dion & Borraz, 2015) or in public relations (Martino & Lovari, 2016), always from an internal perspective of brand heritage as a resource.

Brand heritage is also considered an extrinsic attribute (Keller & Lehmann, 2006), a set of associations based on historical references (Balmer & Burghausen, 2015; Hakala et al., 2011; Hudson, 2011). Consumer researchers consider consumers’ perception of brand heritage salience, and its subsequent effect on their overall perception of the brand (Rindell, Santos, & De Lima, 2015; Rose et al., 2016; Wiedmann et al., 2011). Rindell et al. (2015) find substantial differences between the company’s understanding of their brand’s heritage and the consumers’ definitions. Wiedmann et al. (2011) show that brand heritage has a positive impact on attitudinal and behavioural variables in the automobile industry. Using experimental design, Rose et al. (2016) show that an emphasis on heritage leads to higher levels of trust and attachment.

While Rindell et al. (2015) had secured access to the company’s internal data, Wiedmann et al. (2011) and Rose et al. (2016) only look at consumers’ perceptions through a quantitative design. Because it requires access to much internal data, Urde et al.’s (2007) definition is not always easy to operationalise when the focus of inquiry is consumer perception. The definition of brand heritage as a set of associations might be better suited for consumer research, but it leaves researchers with the questions of the nature and the structure of these associations (Keller, 1993).

However, consumer researchers measuring brand heritage do not address this question, which could lead to measurement issues of construct validity, statistical conclusion validity, and internal validity (MacKenzie, 2003). A comparative analysis of the three existing measures emphasises two main issues (Pecot, 2016). The first issue relates to the causal relationships: one scale is formative (Wiedmann et al., 2011) while the two others are reflective (Merchant & Rose, 2013; Napoli, Dickinson, Beverland, & Farrelly, 2014). Thus, it is not clear if we consider that the perceptions we measure (the items) are antecedents or consequences of brand heritage with potential circularity biases. For example, in one model, differentiation is a formative indicator of brand heritage (an antecedent) and it is also part of the consequence (cognitive brand strength 3: ‘The brand XY is very distinctive’) (Wiedmann et al., 2011, p.189).

In addition, the scales conflate associations related to the perception of brand heritage with reaction to these perceptions. For example: ‘Brand exudes a sense of tradition’ and ‘Brand reminds me of a golden age’ in Napoli et al. (2014). The former item describes a brand association with no direct involvement of the respondent, while the latter measures a consequence requiring more involvement from the respondent (a nostalgic feeling in this case). Merchant and Rose’s scale is aligned on a single level of analysis but it integrates items reflecting other concepts such as authenticity (‘An authentic brand’) or credibility (‘A trustworthy brand’).This conflation potentially causes issues of circularity when the scale is operationalised in a model with credibility, authenticity or nostalgia as dependent variables.

 More importantly, these issues reflect a lack of clarity at a conceptual level (MacKenzie, 2003). This paper aims to address this gap through a conceptualisation of brand heritage as it is perceived by consumers, and the development and validation of a scale measuring this perception.

**Perceived Brand Heritage: a set of temporal associations**

***A temporal concept***

The first characteristic of heritage in social science is to be a representation of the past aimed at a future transmission (Hartog, 2015; Smith, 1991). Heritage designates the material and immaterial assets which society aims to hand down to the next generation (Smith, 1991). If heritage does represent the past, it does so in the name of the future (Hartog, 2015). As such, heritage encompasses the past, the present and the future, creating intertemporal connections that helps the mitigating of meaning threat in times of uncertainty (Sarial-Abi et al., 2017).

Marketing scholars build on this temporal characteristic. Corporate heritage is thought to transcend past into the present, its three main characteristics being omnitemporality (conflation of the past, present and prospective future), intergenerational continuity, and the relative invariance of corporate traits (Balmer & Burghausen, 2018). In product branding as well, brand heritage is omnitemporal (Wiedmann et al., 2011): it refers to the brand history and its stability over time (Morhart et al., 2015). It is an invocation of the past in the present (Hakala et al., 2011), creating a sense of stability (Rose et al., 2016). Authors seem to converge towards a definition of heritage in brand management that revolves around temporal considerations (e.g., stability, invocation of the past in the present, invariance, anticipation of the prospective future…). This is consistent with its use in social sciences.

As a purely temporal concept, brand heritage is distinct from authenticity, which is a quality of being genuine or true (Morhart, Malär, Guèvremont, Girardin, & Grohmann, 2015; Napoli, Dickinson-Delaporte, & Beverland, 2016). Of course, there are conceptual similarities: as heritage is an attribute of authenticity (Beverland, 2006), it implies authenticity (Cooper et al., 2015) and can be a source of authenticity (Burghausen & Balmer, 2015). Brand authenticity seems broader than heritage: it is a perception of a brand true to itself and to its consumers, but also responsible, and able to help the consumers to stay true to themselves (Morhart et al., 2015). There are different conceptualisations (Morhart et al., 2015; Napoli et al., 2014), all of which have several dimensions that involve temporality (e.g., continuity in Morhart et al., 2015), but several others that can be managed without any temporal grounding: for instance, signalling the method of production, the importance of craftsmanship and sincerity, downplaying commercial motives, or relating to a specific place (Beverland, 2006; Leigh, Peters, & Shelton, 2006; Napoli et al., 2014) do not require any temporal anchoring. Recently created celebrity brands are considered authentic because they appear genuine, although they lack any heritage (Ilicic & Webster, 2016). An investigation of young authentic brands reveal that authenticity is mostly created through processes of transparency, as well as virtuousness and proximity (Guèvremont, 2018).

Of course, to mention temporality through brand heritage can increase or facilitate the emergence of those perceptions (Athwal & Harris, 2018; Fritz, Schoenmueller, & Bruhn, 2017; Morhart et al., 2015). Morhart et al. (2015) find conceptual similarities between brand heritage and the dimension of continuity of perceived brand authenticity (PBA). They also find that communicating brand heritage (roots) has a positive effect on PBA. We understand from the literature on heritage and authenticity that the latter looks primarily at non-temporal aspects of transparency, virtuousness and proximity (Guèvremont, 2018), while brand heritage is primarily a temporal concept relating to omni-temporality (Balmer, 2013). We propose to limit brand heritage from a consumer perspective to a set of associations related to the temporality of the brand.

***The perception of brand associations***

Literature on archaeology, sociology, history and anthropology shows that heritage is not any representation of the past. It aims to strengthen the identity of the object it is attached to (Hartog, 2015; Lowenthal, 2015; Walsh, 2002). For instance, Walsh (2002) underlines that the obsession for the depiction of one’s identity differentiates heritage from history, the main objective of which is scientific investigation.

Brand heritage is often associated with nostalgia because brand heritage strategies often build on collective nostalgia (Testa et al., 2017). However, unlike the decision to make brand heritage salient, this bittersweet feeling caused by distance is not under managers’ direct control. Nostalgia is a combination of memories, emotions and thoughts that can be related to a brand or another stimulus (Ford, Merchant, Bartier, & Friedman, 2018). Consumers’ perception of brand heritage could facilitate the emergence of nostalgic feelings (Ford et al., 2018; Higson, 2014) related to one’s own past, or to a collective past. Nostalgia proneness, as an individual trait (Holbrook, 1993; Schindler & Holbrook, 2003), could moderate the impact of brand heritage on attitudes or behaviours. Ultimately, brand heritage and nostalgia operate at different levels: nostalgia is an experiential state belonging to the intra-psychic perspective, while brand heritage belongs to a managerial perspective (Ford et al., 2018). When seeing a brand for the first time, consumers may find that it emphasises on its brand heritage without feeling nostalgic. We therefore propose to limit our research on consumers’ perception of brand heritage to direct brand associations, and to exclude reactions to this perception. This clarification distinguishes brand heritage and its measure from past-related concepts requiring individuals’ interpretation of the stimulus. The way we phrase the items of our scale should only measure this perception, and not the consequences of this perception.

**Measuring Perceived Brand Heritage**

Four studies address the second objective of measuring the perception of brand heritage following the recommendations of the literature on scale development (Churchill, 1979), factor analysis (Hair, Black, Babin, & Anderson, 2009; Thomson, 2004) and structural equation modelling (Gerbing & Hamilton, 1996; Thomson, 2004). The first study is a qualitative approach of consumer perceptions to generate items, and a reduction of the number of items to reflect the suggested definition. The second study performs an exploratory factor analysis. In addition to the confirmatory factor analysis, Study 3 checks the discriminant and predictive validity of brand heritage towards the concepts of brand credibility and personal nostalgia. Finally, Study 4 retests the scale with different product categories and tests the known-group validity. Figure 1 represents the design of the research.

Figure 1 - Design of the research

Table 1 shows the different brands that we used in the data collection, with their founding dates. The founding dates provide an indication of the official longevity of each company, but they have some limitations with regard to the purpose of this research. The date does not mean that the products were effectively introduced on the French market at that time (e.g., Heinz or Toyota), so they do not always reflect the longevity of their visibility in the respondents’ environment. In addition, there is not always a link between longevity and the emphasis on brand heritage (e.g., Adidas and H&M, or Quézac).

Table 1 - Brands used as stimuli in the data collection

|  |  |
| --- | --- |
| Period | Brands (founding date) |
| Prior 1815 | Maille (1747), Badoit (1778), Schweppes (1783), Twinings (1706),  |
| 1815-1914 | Alsa (1896), Carapelli (1893), Connétable (1853), De Cecco (1886), Delpeyrat (1890), Lindt (1845), Heinz (1869), Jordans (1855), La Mère Poulard (1879), Lepetit (1872), William Saurin (1898), Lorina (1895), Eau Ecarlate (1851), Nestlé (1866), Hunts (1888), Coca-Cola (1892), Gillot (1912), La Molissana (1912), Saint-Michel (1905), Cadum (1907), Persavon (1911) |
| 1914-1945 | Monsavon (1920), Mont-Saint Michel (1920), Dop (1934), Briochin (1919), Mercedes (1926), Toyota (1937), |
| 1945-2000 | Red Bull (1984), Visa (1958), PayPal (1998), Adidas (1949), H&M (1947), Quézac (1994) |

***Study 1: Generation and Reduction of Items***

Study 1 aims to elicit candidate items for the Exploratory Factor Analysis in Study 2. It has three phases: one elicitation phase, and two reduction phases. The analysis of the literature and 25 exploratory semi-structured interviews on the perception of brands using their brand heritage generated 110 items. The comparison of the existing scales assessed their limitations when taken independently one from another. However, it also showed that they individually represent a facet of brand heritage (Merchant & Rose, 2013; Napoli et al., 2014; Wiedmann et al., 2011). Consequently, the 33 items of the existing scales were considered in the process of generating a new scale, but in order to provide new insights and increase the pool of candidate items, we conducted a qualitative study and collected perceptual insights from consumers in order to generate new items (see details of this qualitative study in Pecot & de Barnier, 2018).

Figure 2 - Design of the qualitative study

Informants were introduced to 27 brands with an emphasis on their heritage using flyers (one flyer per brand, displaying the logo, the brand name and a characteristic product). Informants were first asked to eliminate all unknown brands from the set, then to eliminate those they never buy, and finally to pick, within the remaining brands, the one, two or three brands they consider themselves to be the most loyal to. The interview guide was designed to generate detailed descriptions of the brands, and perceptual elements about the brand’s position towards temporality. Informants were simply asked to describe the first brand they had selected; follow-up questions were asked on memories, places, people, and images associated with the brand, with particular attention given to any unexpected information introduced by the informants. If the informants had selected a second or a third brand, the same process was repeated. When it had not been already raised and detailed in the first part of the interview, informants were specifically asked about their perception of the brands’ temporality, and follow-up questions were used to expand the perception of heritage branding to other product categories. On average, the interviews lasted 44 minutes; they were fully recorded, transcribed and compiled in a single document. As is common for exploratory studies, we carried out a manual analysis. In practice, after a first impressionistic reading of the transcripts, a second reading focused on the words or group of words that the interviewees used to describe the brands. These descriptions could be adjectives such as ‘tenacious’ or ‘stable’, or more elaborated characteristics such as ‘its packaging does not change’ or ‘a brand one can transmit’, sometimes stated in opposition to other brands. Altogether, this analysis generated 77 additional items, creating a pool of 110 items.

A second phase aimed to eliminate the items inconsistent with the definition of the concept (e.g., measuring a distinct concept such as trust or authenticity). Two marketing academics with good expertise of brand heritage removed those items that did not reflect the definition (inter-judges reliability=0.74; the judges discussed until they reached agreement).

This second phase leaves the list with 42 items, which are used in an exploratory survey (N=102), aiming to eliminate those items that are not central from a consumers’ perspective. Consumers recruited on an online panel are asked to choose one brand they know among 30 heritage brands (selected a priori because they reflect the definition). Consumers rate the brand they selected on the 42 items. We then remove the items that are less representative (average score under the mean), and those uncorrelated with others (loading inferior to .5), leaving 27 items.

***Study 2: Exploratory Factor Analysis***

The questionnaire was administrated by Arcane Research, a professional survey company specialising in consumer research. They use their own panel - ‘Panelia’ - covering 60.000 households. The collected sample has 243 respondents for 27 variables, representing a 9:1 ratio, close to the 10:1 ratio that is recommended, and clearly above the 5:1 minimum (Hair et al., 2009). Respondents select one brand they know among the same group of brands used for the interviews in Study 1. They report their perception of brand heritage as regards the 27 remaining items. The EFA is performed on SPSS 24.0 using Maximum Likelihood as the extraction method (Hair, Babin, & Krey, 2017), and Promax rotations (k=4), as the three dimensions should measure the same construct. The literature advises removing items with a quality of representation or a loading inferior to .5, as well as the item with cross-loading above 0.2 (Hair et al., 2009).

As far as the dimensionality is concerned, eigenvalues recommend retaining only two dimensions, according to Kaiser’s criterion. However, this criterion is over-conservative when there are fewer than 20 variables (Hair et al., 2009). In addition, two arguments advocate for retaining three dimensions: the sample is small and it influences Kaiser’s test (Hair et al., 2009), and the literature considers the extraction of too few factors as a more important error than extracting too many factors (Fabrigar, Wegener, MacCallum, & Strahan, 1999). In addition to these methodological considerations, if we understand time as a perception of change in our environment (Fraisse, 1984), we can see how the three dimensions reflect a temporal facet of the heritage concept (Table 2 and 3). This conveys the perception of three distinct qualities: the immunity from essential change, the length of the existence, and the ability to adjust to changes.

Table 2 - Exploratory Factor Analysis (loadings)

|  |  |
| --- | --- |
| Items | Factors |
| Stability | Longevity | Adaptability |
| A stable brand | **0.907** | 0.671 | 0.495 |
| A brand that won't disappear tomorrow | **0.901** | 0.600 | 0.466 |
| A brand which will never go out of fashion | **0.862** | 0.669 | 0.532 |
| A timeless brand | **0.851** | 0.662 | 0.530 |
| A brand that is very continuous | **0.842** | 0.640 | 0.426 |
| A brand that has existed for a long time | **0.803** | 0.570 | 0.492 |
| A brand exuding a sense of tradition | 0.659 | **0.889** | 0.639 |
| A brand that reinforces and builds on long-held traditions | 0.704 | **0.836** | 0.590 |
| A brand with roots | 0.645 | **0.822** | 0.573 |
| A brand that has a strong link to the past | 0.524 | **0.781** | 0.447 |
| A brand pointing to its founding date | 0.470 | **0.635** | 0.466 |
| A brand that renews itself | 0.506 | 0.550 | **0.883** |
| A brand that knows how to reinvent itself | 0.492 | 0.654 | **0.881** |
| Extraction Method: Maximum Likelihood.  Rotation Method: Promax with Kaiser Normalization. |

Table 3 - Factor Correlation Matrix (EFA)

|  |  |  |  |
| --- | --- | --- | --- |
| Factor | 1 | 2 | 3 |
| 1.Stability | **0.742** | 0.518 | 0.309 |
| 2.Longevity | 0.720 | **0.636** | 0.438 |
| 3.Adaptability | 0.556 | 0.661 | **0.778** |
| AVEs are in bold on the diagonal; squared correlations are above the diagonal; correlations are below the diagonal |

The items loading on the first dimension reflect the stability: the perception of persistence of the brand’s values and promises over time, without a change in essence. Regardless of the age of the brand, stability is observed in the brand’s core values and a track record (Urde et al., 2007). The permanence of symbols and values in the company’s operations and marketing activities makes this stability available to the consumer (Hakala et al., 2011; Urde et al., 2007). Examples are the permanence of the same logo, slogan, or packaging over time, or the inscription of the brand in a long-standing tradition and the use of words such as ‘consistent’, ‘continuous’, ‘same’. Stability provides a stronger sense of identity for the company (Blombäck & Brunninge, 2009) and a long-term vision of how the brand should be managed, as it does not seek to change with trends (Hakala et al., 2011). This dimension is temporal in the sense of reflecting an attitude to change.

The items loading on the second dimension reflect a perception of longevity: that is, the perception that the brand is conscious of the length of its existence, its traditions and its roots. Brands emphasise their founding date, remind people of the company’s history on the website or the packaging, but also place importance on the use of certain fonts or black and white visuals. This dimension of brand heritage is stronger when the organisation has manifest interest in history, care for traditions (Burghausen & Balmer, 2014), or when symbols express a sense of the past (Urde et al., 2007). Factual age cannot stand for the perceived longevity, as many older brands do not emphasise their heritage (Urde et al., 2007). Moreover, as brand heritage is a construction, younger brands can build themselves a heritage (Schroeder, Borgerson, & Wu, 2015).

The items loading on the third dimension reflect the perception of adaptability, which is often cited in brand heritage literature in relation to the balance between radical change and immobility (Hudson, 2011). The stewardship management of the heritage brand is based on a long-term strategy (Urde et al., 2007). This strategy requires some evolution to cope with market changes, but always with a long-term focus (Burghausen & Balmer, 2015), and the acknowledgement of what has been done before (Hakala et al., 2011). Brand heritage is omnitemporal: it embraces the three timeframes of past, present and future. Making the past relevant in the present requires adjusting the past without altering the essence of the brand (Balmer, 2011).

We therefore retain the three dimensions at this stage. A scale with 13 items shows good indices of adequacy (MSA[[1]](#footnote-1) .939; χ²=74.9; df 42) and convergent validity (Stability: AVE[[2]](#footnote-2)=0.704; Jöreskog=0.934; Longevity: AVE=0.552; Jöreskog=0.858; Adaptability: AVE=0.744; Jöreskog=0.853). We assess discriminant validity with two methods. A single factor solution shows a significant decrease of the fit index compared to the three factors solution: 524.021 (df: 65), Δχ²= 449.125 (23) p<0.001. The square value of the highest common variance between the factors (0.518) is inferior to the lowest score of average variance extracted (0.552).

***Study 3: Confirmatory Factor Analysis and Nomological Validity***

We collected a new set of data on a professional panel (N=989). These respondents took part in the evaluation of four FMCG brands (Nestlé, Lindt, Heinz, and Hunts). These brands operate in two different markets and differ in their brand awareness. Respondents evaluate brand heritage on the 13 items extracted from the EFA, but also on two additional variables selected to test the discriminant and nomological validity of the scale with a cognitive and an affective outcome (Table 4): brand credibility on five items (Erdem, Swait, & Valenzuela, 2006) and personal nostalgia, defined as the nostalgia felt in reaction to a stimulus on three items (adapted from Baldwin, Biernat, & Landau, 2015; Merchant, Ford, Dianoux, & Herrmann, 2016; Pascal, Sprott, & Muehling, 2002).

We select these two variables for the discriminant and nomological validity because they often overlap with brand heritage in existing past-related research in marketing. The credibility of the brand as it is measured by Erdem et al. (2006) is conceptually similar to perceived brand authenticity, as the latest research considers credibility as the dimension of authenticity that explains most variance (Morhart et al., 2015). It also provides an example of a cognitive outcome of brand heritage. Nostalgia is probably the past-related concept receiving most of the attention in marketing research. Personal nostalgia is a bittersweet feeling, caused by distance from one’s own past with an effect on consumers’ emotions and attitudes towards brands (Baker & Kennedy, 1994; Holbrook, 1993; Kessous, 2015). As it is an emotion of the consumer, we expect it to be different from the mere perception of a brand’s characteristics, such as heritage. It exemplifies an affective outcome of brand heritage.

Table 4 - Items used in Study 3

|  |  |
| --- | --- |
| **Brand heritage** | **Brand credibility** |
| This brand will never go out of fashion.This brand is continuous.This brand is stable.This brand won't disappear tomorrow.This brand is timeless. This brand has existed for a long time.This brand exudes a sense of tradition.This brand reinforces and builds on long-held traditions.This brand has roots.This brand has a strong link to the past.This brand points to its founding date.This brand knows how to reinvent itself.This brand renews itself. | This brand delivers what it promises. This brand’s product claims are believable.This brand is committed to delivering on its claims, no more and no less. This brand has a name you can trust.This brand has the ability to deliver what it promises. |
| **Personal nostalgia** |
| This brand makes me feel nostalgic.This brand takes me back to my past.This brand evokes in me the good old days. |

We specify a reflective model and test it on AMOS 21.0 with structural equation modelling (Hair et al., 2009). The measurement model of brand heritage is expected to be reflective: brand heritage leads to a perception of stability, longevity, and adaptability, which then leads to the measured variables (e.g., ‘A brand with roots’) rather than the other way around (e.g., a measured variable causes longevity, which causes brand heritage). Using Bollen's example (1989): unlike variables such as gender or divorce, that are cause indicators because they do not change when the latent variable is modified, a modification of the brand heritage is likely to cause change in a consumer’s answer to ‘Is that a brand with roots?’. This is why the measured variables are considered as effect indicators.

The specified model extracted from EFA with 13 items shows good but unsatisfactory fit indices. Following recommendations from the literature, three items correlating with more than one factor are removed to improve the quality of the measure. The final measurement model has three dimensions and ten items (χ²=77.5; df=32; χ²/df=2.423; CFI=.993; TLI=.991; RMSEA=.038). It satisfies the criteria for convergent validity and reliability (Table 5). We find measurement invariance across groups.

Table 5 - Perceived Brand Heritage Scale

|  |  |  |  |
| --- | --- | --- | --- |
| Dimensions | Items (loading) | Jöreskog’s ρ | AVE |
| Stability | A brand which will never go out of fashion (.839)A brand that is very continuous (.712) A timeless brand (.825)A brand that won’t disappear tomorrow (.815) | .876 | .639 |
| Longevity | A brand exuding a sense of tradition (.835) A brand that reinforces and builds on long-held traditions (.846) A brand with roots (.879) A brand that has a strong link to the past (.820) | .909 | .714 |
| Adaptability | A brand that knows how to reinvent itself ( .956) A brand that renews itself (.926) | .939 | .886 |

To establish nomological validity, we first need to establish the discriminant validity between brand heritage, personal nostalgia and brand credibility. We test a covariate model with brand heritage as a second-order factor, brand credibility and personal nostalgia. As expected, the confidence interval around the correlation between the constructs does not include ± 1 (Table 6), supporting discriminant validity (Anderson & Gerbing, 1988).

Table 6 - Correlations between brand heritage, brand credibility and personal nostalgia

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Parameters | Estimate | Lower | Upper | P value |
| Brand Heritage – Brand Credibility | .799 | .751 | .842 | .001 |
| Brand Heritage – Personal Nostalgia | .149 | .086 | .220 | .001 |

Then, we specify a structural model with brand credibility and personal nostalgia as dependent variables in order to test the predictive validity of the measurement scale. The signalling theory supports the causal relationship between our definition of brand heritage and brand credibility (Pecot, Merchant, Valette-Florence, & De Barnier, 2018). The applications of the signalling theory in marketing posit that signalling the temporal consistency of the branding strategy generates more brand credibility (Erdem & Swait, 2004). Brand credibility is defined as ‘the believability of the product position information contained in a brand, which entails consistently delivering what is promised, and it represents the cumulative effect of the credibility of all previous marketing actions taken by that brand’ (Erdem et al., 2002, p. 3). It has a strong temporal component and it is reasonable to expect brand heritage perception to influence brand credibility. We draw the causal relationship between brand heritage and personal nostalgia from the literature. Personal nostalgia is caused by temporal distance from an earlier period of one’s life (Baker & Kennedy, 1994; Wildschut, Sedikides, Arndt, & Routledge, 2006). A temporally distant branding such as the use of brand heritage is likely to cause more nostalgia than a branding connecting the brand with the here and now. In addition, recent research suggests that brands whose adverts are associated with the past generate a process of reconstructing nostalgic memories (Zhao, Muehling, & Kareklas, 2014).

The causal model has good fit indices (χ²=485.5;df=147; χ²/df=3.303; TLI=.971; CFI=.975; RMSEA=.048). A bootstrap analysis (5000 samples, confidence interval 95%) confirms that brand heritage has a significant and positive effect on brand credibility and on personal nostalgia (Figure 4). Given the rather high loading of brand heritage on brand credibility, we perform another test of discriminant analysis. We compute the heterotrait-monotrait ratio of correlations (HTMT) between the two constructs and obtain the score of 0.77, below the recommended threshold of 0.85 (Henseler, Ringle, & Sarstedt, 2015). The last analysis performed in Study 3 aims to check the existence of brand heritage as a second-order factor in a nomological network (Chin, 1998). We specify a rival model with the dimensions of stability, longevity and adaptability directly related to credibility and personal nostalgia. This model shows poorer indices of fit compared to the solution with brand heritage as a second-order factor (Χ²/df=8.940; GFI=.882; AGFI=.846; TLI=.900; CFI=.915; RMSEA=.048).

Figure 4 - Causal model

This third study confirms the reliability of the tri-dimensional scale, as well as its discriminant and predictive validity from similar concepts, such as the perceptions of brand credibility and the feelings of personal nostalgia. It brings empirical evidence for our suggested definition, which focuses on the perception of change and continuities in brand management. This phenomenon that we label brand heritage is shown to trigger cognitive and affective reactions.

***Study 4: Retests and Known-group Validity***

The fourth and last study aims to retest and validate the scale in other product categories than food, to show discriminant validity with perceived authenticity (measured with three items: “This brand is not an imitation”, “This brand is the original [product category]”, “This brand is authentic”), and to demonstrate that the scale differentiates between brands that are a priori expected to differ in their use of brand heritage. Three marketing experts were asked to select pairs of brands expected to differ in their use of heritage within similar categories in the Interbrand ranking. They selected Mercedes and Toyota in automobiles, Coca-Cola and Red Bull in soft drinks, Visa and PayPal in credit cards, Adidas and H&M in apparel. Unlike prior studies, this one covers a larger set of categories, beyond FMCG.

A sample of 316 consumers recruited on an online panel evaluated these eight brands on the 10 items of the brand heritage scale, and on three items of brand authenticity. We compute the heterotrait-monotrait ratio of correlations between the items of brand heritage and brand authenticity. This ratio is .76, under the .85 threshold, supporting our assumption that when brand heritage is measured as a temporal construct, it measures something different from brand authenticity. We impute a factor score for the brand heritage construct on AMOS to obtain a measure without the residual error. We then run t-tests and a Duncan test on SPSS, using the brand heritage factorial scores (Table 5).

As expected, Coca-Cola shows a higher score than Red Bull (t(87) =7.277; p<.001), Mercedes than Toyota (t(75) =4.730; p<.001), Visa than PayPal (t(74) =2.016; p<.05), and Adidas than H&M (t(72) =3.826; p<.001). The scale is able to differentiate brands within distinct product categories. The Duncan test identifies six groups of brands, reinforcing the ability of the scale to discriminate across categories (Table 7). It shows that although brand heritage has a positive effect on credibility and nostalgia, many brands such as Red Bull can be hugely successful without scoring high on brand heritage perceptions. This test also shows that brand heritage is not contingent on the product category, as consumers perceive similar levels of brand heritage for Coca-Cola and Adidas, for example. However, we still recommend using this scale to compare brands within product categories, or to track the evolution of a brand over time.

Table 7 - Results of the Duncan test

|  |  |  |
| --- | --- | --- |
| Brands | N | alpha = 0.05 |
| 1 | 2 | 3 | 4 | 5 | 6 |
| Red Bull | 40 | 2,9415 |   |   |   |   |   |
| PayPal | 44 |   | 3,5193 |   |   |   |   |
| Visa | 32 |   |   | 3,8607 |   |   |   |
| H & M | 34 |   |   |   | 3,9467 |   |   |
| Toyota | 39 |   |   |   | 4,0173 |   |   |
| Coca cola | 49 |   |   |   |   | 4,2996 |   |
| Adidas | 40 |   |   |   |   | 4,5827 |   |
| Mercedes | 38 |   |   |   |   |   | 4,7136 |
| Sig. |   | 1,000 | 1,000 | 1,000 | 0,050 | 0,098 | 1,000 |

**Discussion**

This paper suggests an operationalisation of brand heritage as a set of temporal brand associations. One qualitative study generates items, and three surveys (with more than 1,500 respondents in total) show the reliability and validity of a 10-item scale to measure this perception. The structure of the scale with three dimensions (stability, longevity, adaptability) is stable across product categories; it also proves to be able to differentiate brands within a category. Finally, brand heritage is found to be positively correlated to, but different from, brand credibility and personal nostalgia.

***Theoretical and Conceptual Contributions***

This research primarily contributes to brand management: not only to the research on brand heritage, but also to the research on time perception in marketing. It also contributes to other disciplines interested in the perception of heritage in other contexts.

First, the results contribute to the research on brand heritage. Building on a temporal approach of the concept, we distinguish its perception from other perceptual concepts. It proves different from authenticity, which captures genuineness and goes beyond temporal perceptions (Guevremont, 2018; Morhart et al., 2015), and from nostalgia, which requires an interaction with the consumers’ own or fantasised past (Ford et al., 2018; Schindler & Holbrook, 2003). There are other conceptualisations of heritage incorporating authenticity, but we argue that our approach through temporality is consistent with the focus on omni-temporality, intergenerational continuity and relative invariance as core characteristics of corporate heritage (Balmer & Burghausen, 2018), as well as with conceptualisation of authenticity as non-temporal (Guèvremont, 2018). It is also consistent with the meaning of heritage in other social sciences (Hartog, 2015; Smith, 1991).

We demonstrate that the perception of brand heritage includes three temporal dimensions: a perception of duration (longevity) and a paradoxical combination of a perception of immunity to radical changes (stability) with an ability to adjust to changes in the environment (adaptability). This is a contribution to prior work mentioning seniority, longevity and stability (Balmer, Greyser, & Urde, 2006; Merchant & Rose, 2013). Our results suggest that stability and longevity alone do not perfectly reflect the particularity of brand heritage and its omnitemporal characteristic (Balmer, 2011). These results also contrast with prior research focusing on longevity (Desai, Kalra, & Murthi, 2008), in which it is suggested that brand heritage is not only about the longevity or the age of the brand.

Second, the results also contribute to the research on the temporal perception of brands. Our approach builds on an experience of time through the perception of change and continuity in one’s environment (Fraisse, 1984). Theoretically, it suggests that consumers make sense of a brand’s temporal dimensions through the changes they perceive (or do not perceive) when they interact with the brand. Sometimes, radical change meets consumers’ hostility (Dubow & Childs, 1998; Merchant, LaTour, Ford, & LaTour, 2018). On the other hand, evolution is necessary (Merrilees, 2005) because markets change and brands need to reinvent their offerings (Hamlin, Bishop, & Mather, 2015; Holt, 2002). Our scale shows that consumers can perceive the same brand as being stable and yet adaptable. .

These results add to recent research on brand ambidexterity (Beverland, Wilner, & Micheli, 2015). Existing research suggests a three-stage process based on design thinking to help brand managers to achieve ambidexterity. This quality allows a brand to explore and exploit at the same time, which would be a way of addressing the problem of senescence. However, this important step does not consider the consumers’ perceptions of these efforts. Our results take a different and temporal perspective: the scale does not aim to measure the perception of ambidexterity per se, but it allows an estimation of consumers’ perceptions of the stability, the longevity, and the adaptability of a brand.

Third, although it emerges from the study of brand, this scale could also contribute to further research in disciplines interested in the perception of organisations or objects related to the past. Our approach through consumption captures a perception of continuity that accommodates change. Psychologists, but also archaeologists, historians or sociologists interested in the perception of heritage could replicate our approach, if not our scale, to carry out quantitative studies. Similarly, sites managers could use the scale to monitor how well their audiences perceive the balance between change and continuity. As they are consistently focusing on a single level of analysis, the scale is very versatile. The items can easily serve another discipline’s purposes. We focus on a brand target but we could adapt them to monuments, sites or museums, e.g., ‘A site that would never go out of fashion’, ‘A monument that reinforces and builds on long-held traditions’, ‘A museum that reinvents itself’.

***Managerial contributions***

Our scale shows that brands do not need to choose between the radical options of changing everything or nothing. We confirm the observations reported by prior qualitative research on these long-standing organisations (Burghausen & Balmer, 2014; Hudson, 2011; Urde et al., 2007), and the intuition that Lampedusa’s maxim applies to brand management: sometimes, if one wants things to stay the same, they will need to change. Our scale is able to estimate the extent to which consumers perceive the brand to master this paradox.

Our scale equips managers with an important tool. As long-standing firms must resist new entrants with business models favouring constant innovations (MSI, 2016), this scale adds to the existing tool kit, with a scale to monitor how and to what extent these changes impact consumer perceptions. Brand managers can use the scale to reposition their brands around their heritage, and they can also use it as a guidance tool to set objectives or monitor the influence of their actions on consumers’ perception. The distinction between three dimensions of the concept is particularly relevant for managers aiming to find the right balance between respect for traditions and their adaptability. Depending on their marketing objectives, managers could focus more on one of the three dimensions: for instance, stability for brands that have launched many innovations and need to anchor them into a longer perspective, like Apple; longevity for brands that need to reassert their past due to harsh competition, which may be the case for Citroën; and adaptability for brands that need to be perceived to be more innovative, such as Coca-Cola.

As our 10 items are versatile, managers of heritage sites could adapt the scale to monitor how well their audiences perceive the balance between change and continuity. The scale could also be used for territorial marketing in order to assess a city’s perceived heritage with items such as ‘a city that has strong links to the past’, or ‘a city that knows how to reinvent itself’. City brand managers could use the scale to benchmark their city with other ones.

***Limitations and Further Research***

This work also has limitations that further research could address. First, the data come from French respondents. Many scales are built from single-country samples; as an example, previous scales have only been tested in Germany or in the US. However, we argue that brand heritage is a temporal phenomenon and the perception of time varies in distinct cultural backgrounds (Geertz, 1973). Data from Europe or America could increase the psychometric properties of the scale. Data from Asian countries where time is perceived in a rather cyclical way could show different results or dimensions. Nevertheless, as such, this research already brings new perspectives to brand management research on a European market where the heritage phenomenon is arguably very pronounced. The development and construction of the scale is based on a large variety of packaged consumer goods; we then extend the validity to automobile and financial services, but more research could allow further generalisation of the results. Future research could also investigate how this scale applies to luxury brands. The links between luxury scales and this perceived brand heritage scale could be studied in order to assess how important brand heritage actually is in luxury marketing.

Another limitation of this research is that it does not consider situations in which brands do not use heritage but are still successful. As it focuses on the development of the tool, it does not engage with the identification of moderators explaining under which conditions a lower or a higher salience of brand heritage leads to optimal effect on dependent variables such as attitudes towards the brand, preference, willingness to pay, etc. Further research could use this scale to investigate the moderators.

Finally, this scale identifies that longevity is part of the perception of brand heritage. Although we insist that the official age of a brand and its perception as heritage are not the same, most of the brands we identified in the qualitative study are more than 100 years old. An interesting question that further research could look at is: how old should a brand be to be perceived as heritage?

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1. Measure of Sample Adequacy (should be above 0.6) [↑](#footnote-ref-1)
2. Average Extracted Variance (should be above 0.5) [↑](#footnote-ref-2)