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**“Conceptualizing the inextricable link between heritage and sustainability:
Antecedents and outcomes of sustainable heritage-based (corporate) brands”**

ABSTRACT

This theoretical study argues that there is a strong prima facie conceptual and pragmatic link between the management of (corporate) heritage brands/identities and wider management/marketing questions raised by issues such as sustainability, CSR, as well as ethical/conscientious/purposeful (corporate) branding.

By developing a conceptual model of (corporate) brand management for honouring the past, mastering the present and safeguarding the future, we suggest antecedents and outcomes of corporate heritage sustainability. Antecedents have been envisioned as: identity embedment, socio-cultural and multigenerational responsibility, and leadership commitment. Accordingly, when brand heritage and sustainability are successfully managed, they act as a source of credibility, trust and, more in general, competitive advantage providing value across generations.

The theoretical foundation of the inextricable link between heritage and sustainability has been substantiated through an analysis of two case histories, namely Brunello Cucinelli and Unilever, illustrating the applicability of our model to brand management practice.

Keyword_1: heritage

Keyword_2: sustainability

Keyword_3: brand management

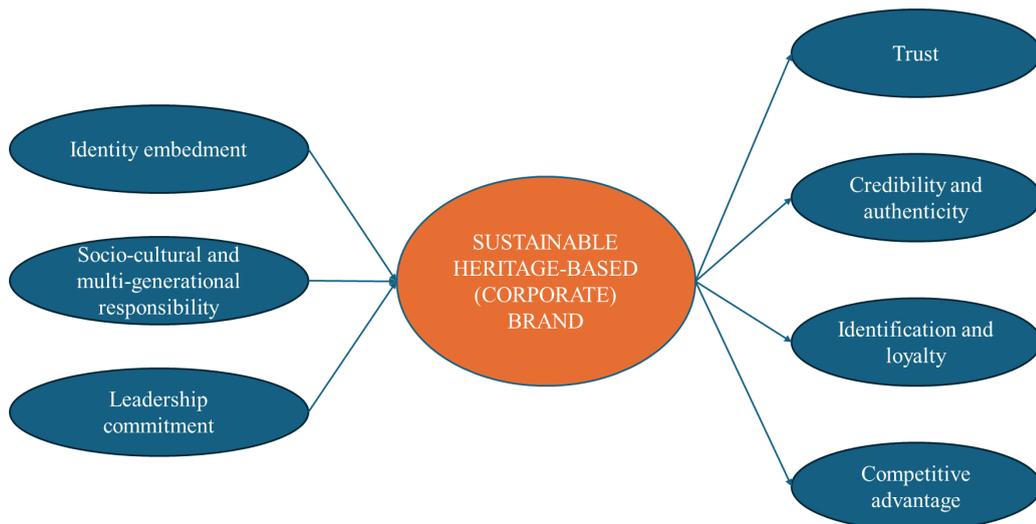
INTRODUCTION

Some commercial and non-commercial organisations qualify as corporate heritage brands/identities. They are characterised, inter alia, by their *omni-temporality* – a distinctive temporal relation between past, present, and future that manifests in specific defining traits (Balmer, 2011, 2013; Burghausen, 2023), based on intergenerational continuity and a trans-temporal responsibility towards the organisation and its heritage, brand/identity and multiple stakeholders (Balmer, 2011, 2013). Thus, these organisations and their brand/identity require a particular approach to management, viz. *corporate heritage (brand/identity) stewardship*, which is predicated on a particular managerial mindset and set of custodial behaviours (Burghausen and Balmer, 2014, 2015).

This paper suggests that there is a strong prima facie conceptual and pragmatic link between the management of corporate heritage brands/identities and wider management/marketing questions raised by issues such as sustainability, CSR, as well as ethical/conscientious corporate branding. For example, the notion of corporate heritage stewardship requires both: sustainable and responsible conduct long-term (Balmer and Burghausen, 2015) and across multiple generations of stakeholders (Balmer, 2011, 2013). Heritage brands/identities frequently acquire social roles (Balmer 2011, 2013) and embrace wider responsibilities and duties (Burghausen and Balmer, 2015) beyond the focal organisation itself. Further, CSR and conscientious branding can only work with a custodial stewardship approach to management that is rooted in a strong sense of trans-temporal and trans-generational responsibility, care for and identification with a shared long-term purpose that serves the common good too, rather than narrow short-term instrumental ends only (Iglesias et al., 2020). Consequently, sustainable, responsible and ethical brands/identities, like heritage brands/identities, requires a different temporal orientation/perspective that is long-term, trans-generational and cutting across the past, present and future, while focusing on conservation, preservation and protection too (Urde et al., 2007; Balmer, 2013).

We tentatively show in this paper that corporate heritage and CSR/ethic/consciousness are inextricably linked and mutually reinforce each other, forming a foundation to generate value across generations, fulfilling their role as ethical stewards in the society. In particular, we propose a conceptual model to successfully manage and maintain a sustainable heritage-based (corporate) brand (Figure 1).

Figure 1. Antecedents and outcomes of sustainable heritage-based (corporate) brands



ANTECEDENTS

Identity embedment

In order to generate positive outcomes, brands are called to deeply embed their ethical traits to their brand corporate heritage identities (Al-Amad, 2019). For instance, by drawing on a qualitative study on the Co-operative Bank, Al-Amad and Balmer (2023) suggest that sustainability must be treated as a strategically embedded part of the banks' long-term heritage identity, reinforcing a deep commitment to conscientious branding. Moreover, often sustainability is anchored in a corporate identity since the brand's inception, implying that ethical/conscientiousness existed implicitly as part of the brand heritage before formal naming (Al-Amad and Balmer, 2023; Iglesias et al., 2023). An exemplar case can be represented by Patagonia that ingrained its sustainability from its foundation and is often cited as an archetype of heritage-driven sustainability, embedding ethics into its identity (Achabou, 2020; Iglesias et al., 2019).

Socio-cultural and multi-generational responsibility

Corporate heritage sustainability brands called to reflect a long-term community relationships and historical embeddedness in a brand place and culture (Al-Amad, 2019). For instance, practices such as fair employment and transparency are treated as heritage-based moral traits, allowing to ground the brand responsible actions in institutional memory and cultural continuity that, in turn, contribute to the national economic and social development (Al-Amad and Balmer, 2023).

Leadership commitment

Leaders are deemed to be custodians of the "temporal, territorial, social, cultural and ancestral identities" (Balmer, 2013, p. 290) initiated by the founder(s), by consistently embedding the sustainable heritage to the brand culture and community over time, reinforcing long-term ethical relevance. Hence, managers have the responsibility to ensure the multi-generational survival of ethical values (Iglesias et al., 2025).

OUTCOMES

Trust

A longstanding sustainability record leads to consumer trust and goodwill, highlighting the key role of consistent heritage identities while delivering a conscientious branding (Achabou, 2020; Vanhamme & Grobben, 2009). In particular, whilst Vanhamme and

Grobben (2009) demonstrate that long term CSR records foster goodwill, Maignan and Ferrell (2004) confirm that CSR builds consumer trust when aligned with stakeholders values, needs and expectations. In particular, in order to enable adaptive conscientiousness, brands are called to anchoring present efforts in an ethical legacy and future orientation to meet actual consumers expectations while deeping sustainability roots (Achabou, 2020).

Credibility and authenticity

A brand's history of responsible engagement significantly shapes the credibility and authenticity of its sustainable and ethical claims (Iglesias et al., 2019). As highlighted by Hudson and Balmer (2013) corporate heritage brands can use their past actions as evidence of genuine CSR engagement, avoiding skepticism around corporate greenwashing. This is in line with Holt (2004) suggesting that heritage conveys symbolic values strengthening ethical credibility. In fact, whilst sustainability claims may appear opportunistic, corporate heritage can reduce this skepticism by demonstrating long-term consistency, because longevity and track records act as credibility signals (Blombäck & Scandellius (2013). Hence, brands with a sustained CSR history are usually perceived as more credible, while those with shorter histories are seen as opportunistic (Vanhamme & Grobben, 2009).

Identification and loyalty

Sustainability and CSR may act as an augmented heritage trait, which enhances consumer identification and loyalty (Lantos, 2001; Maignan & Ferrell, 2004).

Competitive advantage

Urde et al. (2007) argue that heritage offer brands distinctiveness and makes CSR communication more persuasive, with both creating a competitive advantage that is difficult to imitate. Similarly, Achabou (2020), in the context of clothing and footwear, shows that consumer brand preference is affected by perceived CSR efforts and activities that are judged in light of the perceived continuity and authenticity of such commitments.

CASE HISTORIES

LAWRENCE & MAYO

ANTECEDENTS

Identity embedment

Founded in 1877, Lawrence & Mayo's corporate identity is deeply tied to its heritage as one of India's oldest names in precision eye care and optical retail, extending its for durable, long-lasting eyewear and social well-being, being considered a custodian of vision health across generations.

Socio-cultural and multi-generational responsibility

As a multi-generational business, Lawrence & Mayo has sustained its relevance by adapting to evolving customer needs while respecting cultural and social contexts. It recognizes that vision care impacts education, livelihood, and quality of life, making it a social responsibility as much as a business. Accordingly, Lawrence & Mayo has served multiple generations within Indian families, demonstrating responsibility by making vision care accessible across socio-economic groups. Its eye camps, school outreach programs, and efforts to promote eye health awareness reflect its role in addressing social needs today while safeguarding the vision of future generations.

Leadership commitment

Leadership at Lawrence & Mayo has consistently demonstrated commitment to social impact. The stewardship of successive leaders has ensured resilience and continuity, even in a rapidly changing retail and healthcare environment. By aligning leadership vision with long-term sustainability and ethical business practices, the company exemplifies how strong leadership fosters both commercial success and enduring social value. In particular, current leadership shows commitment by aligning heritage with modern sustainability practices.

OUTCOMES

Trust

With over 145 years of legacy, Lawrence & Mayo has built enduring trust by serving multiple generations of families, ensuring responsible sourcing and affordable solutions. By doing so, it can be considered one of the most reliable names in the optical industry in India, ensuring inclusivity in access to vision care and consistency in delivery of precision and quality.

Credibility and authenticity

Lawrence & Mayo's credibility is rooted in its long-standing reputation for precision in optometry, advanced technology, and professional service standards. The company's history of accurate eye testing, coupled with its adoption of international standards, positions it as an authority in vision care. The consistent alignment between its rhetoric and its practices (i.e., promise delivery) makes the brand credible and authentic across generations. By blending heritage expertise with sustainable practices, such as promoting durable eyewear and encouraging responsible waste management, Lawrence & Mayo consistently deliver on its promises.

Identification and loyalty

The brand is deeply embedded in the lives of its customers, often serving multiple generations within the same family. People not only identify with Lawrence & Mayo but also feel emotionally connected to the brand, which has translated into loyalty across generations. The multi-generational responsibility has built a community of loyal patrons who see Lawrence & Mayo as part of their family tradition. At the same time, younger generations connect with the brand's sustainability ethos, valuing its efforts to balance medical precision with socially conscious initiatives, creating loyalty that blends tradition with modern values.

Competitive advantage

Lawrence & Mayo's competitive edge lies in its ability to blend heritage with ethical foundations, creating a unique position in the marketplace that competitors find difficult to replicate. Its sustainable practices in eye care access, along with its heritage-driven credibility, set it apart from newer players who may lack the same depth of trust or long-term social commitment.

UNILEVER

ANTECEDENTS

Identity embedment

Founded in 1929, Unilever's identity is rooted in being a household name for multiple generations. It has shaped everyday living through brands that have become part of family traditions worldwide, like Lifebuoy for hygiene, Lux for personal care, and

Knorr for food. Unilever can be considered a conscientious corporate brand, with purpose ingrained into its identity and strategy since its foundation (Iglesias et al., 2023).

Socio-Cultural and Multi-Generational Responsibility

Unilever has long carried responsibility across generations by creating product brands that serve basic human needs: nutrition, cleanliness, and care. Its heritage reflects a role in improving everyday quality of life across diverse societies and cultures, embedding itself into multi-generational family routines. At present, this responsibility extends into addressing socio-cultural challenges such as gender equality, health inequity, and environmental stewardship. By ensuring responsible sourcing, supporting smallholder farmers, and running hygiene and nutrition campaigns, Unilever demonstrates responsibility not just to current consumers but also to future generations.

Leadership Commitment

Heritage: Historically, Unilever's leadership has shown long-term commitment to balancing profitability with social good. Its founders embedded values of responsibility into the business model and modern leadership consistently builds on this heritage. For instance, executives like Paul Polman (former CEO) redefined corporate responsibility, shifting focus from short-term shareholder returns to long-term stakeholder value (Iglesias et al., 2023). Current leadership continues to embed sustainability targets in business strategy, showing consistent commitment to uniting heritage with forward-looking responsibility.

OUTCOMES

Trust

Trust is supported by Unilever's long-standing further reinforced by Unilever's to offer consumers purpose-driven product brands (i.e., commitments to reducing plastic, cutting carbon emissions, or ensuring fair trade practices in its supply chains).

Credibility and authenticity

Heritage: Unilever's long history in consumer goods lends it strong credibility as a market leader, enhanced by the company's measurable actions, such as the Unilever Sustainable Living Plan.

Identification and Loyalty

Consumers identify with Unilever brands as part of their family traditions, often spanning multiple generations. For example, Surf Excel or Lipton may evoke memories of family use, strengthening emotional bonds and loyalty rooted in heritage. Younger generations, in particular, find loyalty reinforced when brands embody their values. Purpose-led campaigns like Dove's Real Beauty or Ben & Jerry's activism resonate with conscious consumers, deepening identification and loyalty.

Competitive Advantage

Building on its heritage, Unilever embeds sustainability and ethics into the brand strategy, making sustainability a competitive advantage that appeals to both consumers and investors.

FUTURE RESEARCH DIRECTIONS

Being a pioneer study that links corporate heritage brand and conscientious corporate brand domains of research, future studies should focus on empirical research. In

particular, scholars are called to develop qualitative studies in order to explore how companies manage and maintain a sustainable heritage-based corporate brand. Moreover, future work might focus on quantitative validation to strengthen both academic and managerial implications.

CONCLUSION

By drawing on a literature review and case histories, this paper offers a conceptual model to successfully manage and maintain a sustainable heritage-based (corporate) brand.

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