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INDUCING OMNI-TEMPORALITY:
PRODUCT HERITAGE APPROPRIATION
IN CORPORATE HERITAGE BRAND CONSTRUCTION

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Abstract

This article advances knowledge on omni-temporality by looking at the processes by which a corporate brand may appropriate and valorise the heritage traits of a product brand. Set within the corporate and product brand dynamic, it presents the results of a qualitative study using case research on LVMH and Dom Pérignon. The study identifies how a younger corporate brand appropriates an older product brand's heritage. Results contribute to a better understanding of the induction of omni-temporality, and of the development of a corporate heritage brand. They pave the way for a meritocratic view of corporate heritage as a status that can be acquired through managerial work.

Introduction

“Dom Pérignon is a role model of a historical product for other brands, [demonstrating] how a powerful historical brand can be part of the core strategy of the group [and offering] a best practice internally for other brands” (Informant B).

This quote from one of our interviews with a Marketing Manager of Dom Perignon shows how a product brand's heritage can be put to use at the corporate level and in the broader portfolio.

LVMH is a conglomerate formed in 1987 through the acquisition of multiple smaller companies in the luxury goods sector, some of which date back several centuries. Many corporate brands created after mergers find themselves owning product brands with a rich heritage. They usually respect their name and integrity by adopting a strict house of brands model with full autonomy and little circulation between the product brands (Laforet and Saunders, 1999). However, preserving product brand heritage does not mean they cannot also exploit such heritage at a corporate level, including appropriating some of the heritage traits.

This phenomenon resonates with recent developments in corporate heritage research. Over the last decade, the scholarship in corporate brand heritage has expanded significantly and has now attained critical mass (Balmer and Burghausen 2019, 2015; Balmer 2017). Among the themes that have emerged, several are especially relevant here: the phenomena of omni-temporality and relative invariance (Balmer 2011, 2013; Lee and Davies, 2019; Hudson 2011; Hudson and Balmer 2013), and the dynamics between brands at the corporate and product levels (Hudson, 2011 and 2017; Santos, Burghausen, & Balmer, 2016). The literature identifies the importance of omni-temporality and relates it to the ability to appear relatively invariant through the implementation of corporate heritage identities (Burghausen and Balmer, 2014, 2015). We know that these traits are the result of managerial work (Balmer, 2011), and research has looked at the implementation of relative invariance in a period of change (Lee and Davies, 2019). However, there is no investigation of how omni-temporality might be induced over time. The literature also suggests that product brand and corporate brand heritage influence each other, particularly in a context of a change in management (Hudson 2011, 2017; Santos, Burghausen,

and Balmer 2016). However, the processes of appropriation of traits between product and corporate brands, as well as the case of newer corporate brands owning older product brands remain overlooked.

We shed light on this gap by investigating an extreme case (Yin 2014). Unlike previous cases, LVMH is a corporate brand owning multiple older product brands. We employ case research methodology to explore interactions between these brands at different levels. Our study shows that LVMH is intentionally building a heritage identity for its corporate brand, and that Dom Pérignon plays a crucial role in this process. Dom Pérignon provides a past focus legitimizing LVMH corporate heritage claims (e.g. its symbols, its design elements), while LVMH provides a future focus facilitating Dom Pérignon's relevance (e.g. access to talents). These results contribute to the corporate heritage scholarship by elaborating a model for the induction of omni-temporality and a managerial guide for the appropriation of another brand's heritage.

The development of Corporate Heritage scholarship

A stream of literature has flourished within the corporate marketing theoretical perspective (Balmer 1998, 2001) around the distinctive category of Corporate Heritage Brands and Corporate Heritage Identities (Balmer, Greyser, and Urde 2006; Balmer 2011, 2017; Balmer and Burghausen 2015; 2019; Spielman et al., 2019; Urde, Greyser, and Balmer 2007). All firms have a corporate identity but only some decide to build a corporate brand (Balmer 2001; Balmer and Gray 2003). In the same way, most corporate brands have an inheritance, but only a few decide to build a corporate heritage and use it (Pecot and De Barnier, 2017). A corporate heritage brand

is defined as an organisation highlighting its institutional heritage in its corporate heritage identity and making it central to its strategic position (Urde, Greyser, and Balmer 2007).

Since the formal introduction of corporate heritage brands as a distinct category (Balmer et al., 2006; Urde et al., 2007), marketing scholarship has witnessed significant theoretical advances with the conceptualisation of corporate heritage identities (Balmer, 2011), corporate heritage design (Bargenda, 2015; Sammour et al., 2020), corporate heritage communications to external audiences (Balmer, 2013; Hakala et al., 2011); corporate heritage stewardship (Burghausen and Balmer, 2014; 2015) and its overall internal management (Miller, Merrilees and Cooper, 2017); corporate heritage consumer perception (Pecot and De Barnier, 2018; Rindell, Santos, and De Lima 2015; Rindell, 2017); and heritage branding orientation (Santos et al., 2016). Another stream of research has built on corporate heritage to assess the consumer perceptions of heritage made visible in the marketing mix (e.g. Pecot et al., 2019; Rose et al., 2016). The numerous contributions to this stream of research can be categorised depending on their level of analysis (corporate brands, product brands, or both); and their perspective (internal, external, or both).

Our research focuses on the dynamics between the corporate and product level of analysis, and it adopts an internal perspective by investigating the intention to enhance the corporate heritage brand in an organisation. More specifically, this work focuses on two intertwined notions of the corporate heritage canon, namely omni-temporality and relative invariance, and their role in the development of a corporate heritage brand over time.

Omni-temporality and the appropriation of meaningful traits

Corporate brand heritage literature looks at how companies accommodate change in an overall sense of continuity (Balmer, 2011; Lee and Davies, 2019), and the related implications on management style (Burghausen and Balmer 2015). The introduction of the terms relative invariance (Balmer, 2011; Lee and Davies, 2019) and omni-temporality (Balmer, 2013) highlight the importance of the temporal perspective in corporate marketing (Balmer and Burghausen 2019).

Omni-temporality is formally introduced by Balmer (2013) as one of the six criteria of Corporate Heritage Identities, and as “one of the most important, valuable, attractive, and arguably different characteristics of the corporate heritage notion” (Balmer, 2013, p.305). This notion captures the fact that corporate heritage identities subsist simultaneously in the past, present, and future (Hudson and Balmer, 2013). This perspective is opposed to a more narrow temporal focus prevailing in the marketing scholarship (Balmer and Chen 2017). It requires managers to be understand their responsibilities in terms of stewardship, that is, develop an awareness of positionality, heritage, and custodianship (Burghausen and Balmer 2015).

Relative invariance is a phenomenon through which corporate heritage brands manage to remain the same while changing (Balmer, 2011). Their attributes remain the same, but the meaning attached to them changes, generating tensions requiring a subtle balance of integration and compartmentalisation of meanings to accommodate the different stakeholders (Lee and Davies, 2019). Although different in nature, omni-temporality and relative invariance are often related in the literature (Balmer, 2013; Balmer and Burghausen, 2015; Santos et al., 2016). They can be seen as two sides of the same coin: while omni-temporality describes the work that managers achieve, relative invariance characterises the perception of such efforts. Both reflect the uniqueness of the corporate heritage brand category that combines retrospective and

prospective links with the present (Balmer 2011; Burghausen and Balmer 2014b, Hudson and Balmer 2013), conflating the past, present, and future in the way the brand is constructed and communicated.

Omni-temporality and relative invariance reflect a possibility that organisations can exist in perpetuity (Balmer, 2013), but both ultimately result from managerial actions allowing the corporate heritage traits to endure and remain meaningful (Burghausen and Balmer, 2015). The existing literature is not clear about whether this managerial mindset can emerge over time in any organisation. If one organisation would decide to try, it should certainly develop omni-temporality to increase perceptions of relative invariance. This managerial work may require changes in the core identity traits, the acquisition of new traits (Balmer, 2011), the acquisition of material or ideational traits (Balmer and Burghausen, 2015; Spielmann et al., 2019), or the valorisation of the past in the present (Burghausen and Balmer, 2014ab). This question is particularly relevant for established companies with track records and a sense of time, having rebranded or merged into a new organisation (eg. the Kraft Heinz Company was created in 2015 from two established corporate brands).

While the literature describes the implementation of corporate heritage identities (Burghausen and Balmer, 2014; 2015), the distinctive management of corporate heritage brands (Cooper et al., 2015), and the relevance for consumers (Balmer and Chen, 2017; Pecot et al., 2018; Rose et al., 2016), the processes of appropriation and valorisation of certain traits deserves further scrutiny (Balmer and Burghausen, 2015). We aim to advance the field by exploring the acquisition of new and meaningful traits through the corporate heritage / product heritage dynamic, through the case of a relatively young corporate brand owning older product brands.

The dynamics between product and corporate brand levels

The existence of links and exchange between corporate and product brands is a strategic brand architecture decision (Aaker and Joachimsthlaer, 2000; Kapferer, 2004). Different models exist with more or less autonomy left to the different product managers, and more or less visibility of the corporate name (Kapferer, 2004; Laforêt and Saunders, 1994). The existence of a strong corporate heritage partially explains why a firm adopts a corporate branded strategy (Laforêt and Saunders, 1999). In this case, or in umbrella branding model in which all products of the company bear its name, the corporate heritage flows naturally from the company to the products. Managers use the complementarity of both levels to manage the corporate heritage: Lee and Davies (2019) showed how the use of a portfolio of product brands could help implement change while maintaining the core values in a process of relative invariance. However, other brand architecture models are more complex and deserve further scrutiny.

The role of corporate heritage has been explored in the context of mergers and acquisitions for brands such as BMW (Balmer, 2010), Cunard (Hudson, 2011; 2017) and Ritz-Carlton (Hudson, 2017). Hudson (2011; 2017) explored the intentional nature of strategic heritage branding by showing that Carnival accentuated the historical elements in the Cunard brand after its acquisition, while Marriott abandoned the historical brand elements of Ritz-Carlton under very similar circumstances. In the above examples, the brand architecture is mixed (Laforêt and Saunders, 1994): the company uses the corporate brand for certain offerings, alongside other product brands. The company implements changes in the use of the product brand heritage, with little influence on the corporate brand heritage. Santos et al. (2016) look at another different case. They pay close attention to the synergies between both levels, such as the use of corporate heritage traits in product development, or the role of the new product brand strategy in resolving

employee scepticism. Through a detailed analysis of Ach Brito (corporate level) and Claus Porto (product level), they show a dual dynamic in which the activation of corporate heritage nurtures and inspires product brand positioning, while the materiality of product brand heritage feeds the corporate heritage brand and makes it accessible to external stakeholders. In their example, heritage branding at a product level drives a strategic change at the corporate level. It echoes the suggestion that references to corporate history influence conceptions of the firm's identity both internally and externally (Blombäck & Brunninge, 2009).

These studies suggest the existence of a circulation of heritage within the brand architecture and portfolio: product brand heritage can influence the management of corporate heritage and vice versa. They also suggest that operating certain brands using historical references would affect the firm's overall identity. However, most empirical research has looked at long-standing corporate brands with a rich enhanced or at least latent heritage. The case of newer corporate brands remains (somewhat logically) overlooked in corporate heritage studies. The study of the past in corporate brands has been analysed in an integrated perspective presenting different modes of referencing the past of an organisation (Burghausen and Balmer, 2014). Nevertheless, mergers and the constitution of conglomerates give birth to new firms on a regular basis, some of which inherit product brands with a rich heritage, thereby offering the potential to appropriate all or part in the corporate brand building process. Building on these results, we believe looking at the interactions of corporate and product brands can extend existing knowledge about the acquisition or appropriation of new traits to achieve omni-temporality. This paper therefore addresses the following research questions:

- Can the intention of building a Corporate Heritage Brand appear through the dynamic of corporate and product brand interactions?

- How can a younger corporate brand appropriate the heritage of its older product brands?
- How does omni-temporality emerge from this corporate and product brand dynamic?

Rationale for the study and methodology

The objective of this research is to improve our understanding of omni-temporality and relative invariance by investigating how a corporate brand appropriates the heritage of its subsidiary product brands. The literature recommends the use of case study methods to address research objectives requiring a deep understanding of a contemporary phenomenon in its context (Yin, 2014).

The unit of analysis, or case, is the interconnected system of the LVMH corporate brand and the Dom Perignon product brand between 1987 and 2017. It is therefore an embedded single-case study with two sub-units of analysis mirroring our two levels of analysis: the corporate and the product brand.

While most existing case studies in corporate heritage are representative of corporate heritage organisations (Burghausen and Balmer, 2014), the present case qualifies as an unusual or extreme case (Yin, 2014). LVMH was created in 1987 from the merger of Louis Vuitton and Moët Hennessy, in a federal corporate brand model (Balmer and Gray, 2003). Both parent companies had extensive heritage that could be shared with LVMH. However, Louis Vuitton, Moët and Hennessy continue to exist as product brands with their own heritage, and as a corporate brand in its own right, LVMH is objectively much younger than the vast majority of its product brands. It therefore offers a relevant case of asymmetry between the corporate and product levels in terms of heritage potential. LVMH also finds itself at a turning point. Originally

managed as a house of brands (Laforet and Saunders, 1994), the company mostly used the LVMH name for financial communication. But the corporate brand became more prominent over time and engages with many more stakeholders. As the CEO's children are preparing to assume leadership roles (Le Figaro, 2017), it now has a strategy aimed at raising the corporate brand profile (Schroeder, Borgerson, and Wu 2015). LVMH, therefore, represents a case of a corporate brand in the making, with access to more than 70 product brands or "houses" in five different business units: wine and spirits, fashion & leather goods, perfumes & cosmetics, watches & jewelry, and selective retailing.

We decided to focus on Dom Pérignon as the second sub-case of analysis. We did not engage with the related brand Moët & Chandon, even though Dom Pérignon was originally developed as a variant of Moët, because these brands are now positioned distinctly and managed separately. Both brands have their own marketing, management, budget, activities and distribution channels. Dom Perignon is positioned as one of the most historic LVMH brands, and its mythical origin is sometimes presented as the beginning of the LVMH saga (e.g. in LVMH Annual report, 2015). We expect that a focus on the dynamics between a young corporate brand and an old product brand will inform our understanding of appropriation processes, and beyond, to an understanding of the construction of omni-temporality and relative invariance.

The data collection and analysis progressed iteratively through three sequential stages (Figure 1). Using an abductive approach, each stage involved going back and forth from the data to the literature. Using these different sources allows a triangulation and the emergence of corroborative evidence (Yin, 2014). At both levels of analysis, the collected data combine different perspectives on the dynamic between LVMH and Dom Perignon. It offers the viewpoint of the top management as communicated to shareholders and other business partners

(annual reports), to the media (press releases, press packs), to regulators (contribution to the European Commission), and to consumers (websites, promotional videos and social media accounts). Finally, it encompasses the practical viewpoint of corporate managers and partners in the distribution chain (interviews).

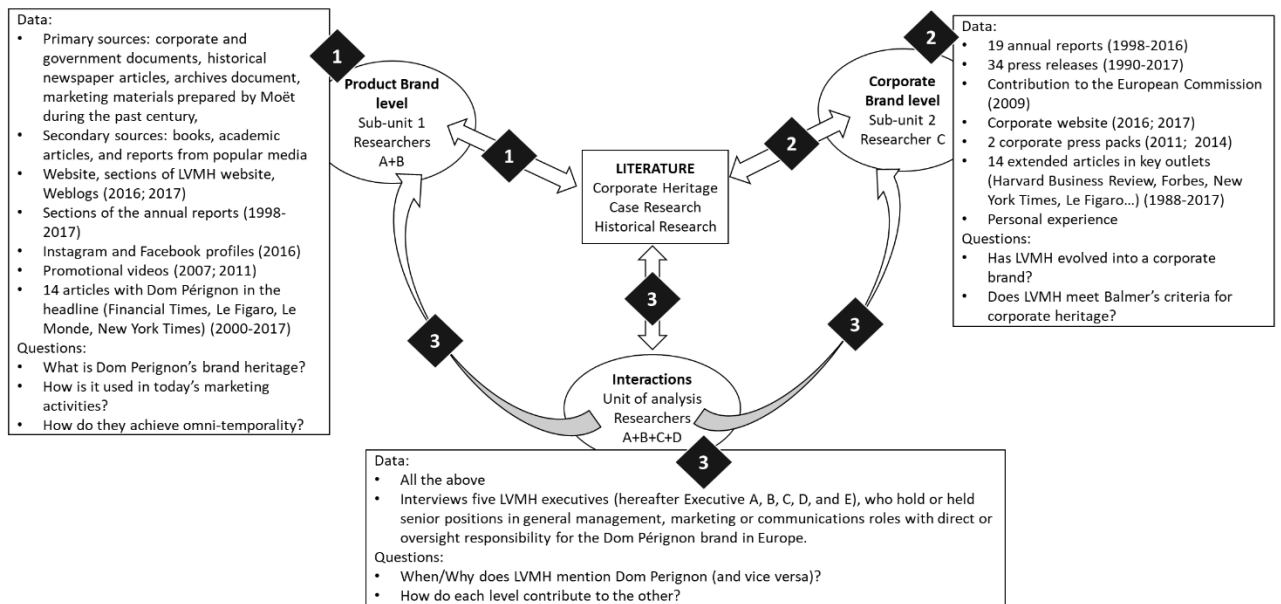


Figure 1 - Stages of the data collection and analysis

Our research adopts a corporate heritage approach, distinct from business history as it embraces the past, present and prospective future (Balmer, 2011). Within these three time strata, corporate heritage scholars can adopt a retrospective approach (e.g. Cooper et al., 2015; Santos et al., 2016) in order to understand how a brand was repositioned. They can also, as we do here, focus on the present and prospective future (e.g. Spielman et al., 2019; Zee and Davies, 2019) with a focus on the “substantive and symbolic relevance [of the past] for the present and prospective future” (Burghausen and Balmer, 2019). As such, this research builds on prior historical analysis of Dom Pérignon, but it focuses on the 1987-2017 period. We use marketing

material and annual reports from this period to identify which elements of the brand’s heritage were put to use in the current strategy.

Although we are mindful of historical accounts of Dom Perignon, our present research does not aim to corroborate the history of Dom Perignon. We only refer to secondary accounts about occurrences before 1987 in order to explain what LVMH can theoretically appropriate. We did not seek access to archives prior to 1987 and we had to rely on publicly available sources for the period 1987-2017. Figure 1 represents this stage with the number 1. Next, we conducted an in-depth analysis of LVMH in the last 30 years of existence using business case methods (Eisenhardt 1989; Woodside and Wilson 2003; Bonoma 1985; Yin 2014).

We also conducted formal interviews with five LVMH executives who held senior positions in general management, marketing or communications with direct or oversight responsibility for the Dom Pérignon brand. This was designed to collect qualitative data about the understandings and attitudes of LVMH executives toward their history, gather data about related management intentions and actions, and substantiate our ongoing suppositions about such matters.

| Profile of informants |
|---|
| Informant A: Sales Director Wine & Spirits in a European country (7 years’ experience) |
| Informant B: Marketing Manager Dom Perignon in an American country (11 years’ experience) |
| Informant C: Communication director LVMH in a European country (12 years’ experience) |
| Informant D: Chairman of one of LVMH Business Units (3 years’ experience) |
| Informant E: General Manager Louis Vuitton in a European country (11 years’ experience) |

Finally, we investigated the interaction between the corporate and the product brand levels. We looked at and analysed the mentions of Dom Perignon in LVMH material (and vice versa) so as to identify when and why one level (corporate or product) was using the other level. This stage (illustrated by number 3 in Figure 1) involved going back to the literature, and to the material collected during stage 1 and 2.

FINDINGS

Our findings are organised in two parts. The first part considers the assumptions of our rationale: that Dom Perignon qualifies as a heritage product brand, and that LVMH is indeed a corporate brand which is intending to become a corporate heritage brand. In the second part, we shed light on the processes of omni-temporality and relative invariance emerging from the interactions between LVMH and Dom Pérignon, by showing that LVMH contributes to securing the future of Dom Pérignon while Dom Pérignon legitimises LVMH corporate heritage strategy.

An established product heritage brand and a corporate heritage brand in the making

Before we looked at the interactions, we performed an in-depth analysis of Dom Perignon and of LVMH. We used secondary historical sources to explore the early period of Dom Perignon's history. We did not perform a formal historical analysis of Dom Perignon prior to 1987, but rather focused our attention on the more recent period 1987-2017. We provide here a synthesis of the results in the form of two figures based on established models for qualitative analysis of

corporate and product brand heritage (Balmer, 2013; Urde et al., 2007). Detailed tables are available in the supplemental online material.

Moët et Chandon first created a premium champagne in 1935 based on the Moët vintage of 1921 (Brinson, 1992; Forbes, 1972; Stevenson, 2014). This was packaged with a bottle and label resembling the original Moët product from 1743. A year later, it was named in honor of Pierre Pérignon (1638-1715), a Benedictine monk who lived and worked at the Abbaye de Saint-Pierre d'Hautvillers (Hautvillers Abbey). He was a pioneer in several important wine production techniques and a popular narrative suggests that he invented the 'méthode champenoise' (Kladstrup & Kladstrup, 2005; Kolpan et al., 2002).

The connection between Moët and Dom Pérignon was always understood by sommeliers and antiquarians, but the shared pedigree became increasingly unclear or unknown for most consumers (Informant A) as its reputation grew and as a consequence of LVMH marketing efforts to establish Dom Pérignon as a distinct brand. It has been managed as a completely separate brand within the LVMH portfolio since 2008 (Informant A). LVMH has removed the Moët name from labels and created a separate Dom Pérignon website without any mention of Moët. The wine has been re-positioned with a faux heritage dating back to the Hautvillers Abbey, which appears on its current website.

Today, Dom Pérignon as a product brand makes extensive use of its invented heritage (Brunninge and Hartmann, 2019). It could be categorised as a form of mythical heritage: it is partly fictitious, it appropriates elements of the collective past, and it facilitates the consumer's historical nostalgia (Hudson and Balmer, 2013). At its most obvious, the brand name refers to the historical person and the packaging retains its archaic design elements, specifically the bottle shape, the font and graphics, and the black foil seal. Heritage is also evident in the intended

brand positioning and the internal culture. As one of our interviewed executives explains: “[The heritage] is evident in some brand elements, like the Dom Pérignon label, the label is a strong brand icon used in many formats of communication, it's an ownable shield as emblem, and the brand key pictogram also used as the product label shape. In intangible aspects, like the strategy or actions developed, the heritage is part of the brand identity that gives credibility to the expertise and superiority” (Informant A).

To assess the salience of heritage, we have used the heritage quotient matrix (Urde et al., 2007) combined with one of its adaptation for the analysis of product brands (Figure 2 and see quotes in Appendix 1). As far as the symbols, the values and the longevity are concerned, we look at what is made available to the consumers on the packaging, website, advertising campaigns and public relations events. For the track record, we rely on the press and the literature. And to assess the importance of the brand’s history in the identity, we use interviews and internal data.

FIRM HISTORY IS IMPORTANT TO THE IDENTITY: interviews show that the history of the brand plays an important role for managers. They identify their heritage as the definition of the brand, and they have trainings and induction to make sure new staff gets familiar with this important aspect of the brand.

LONGEVITY: creation in 1668 (website) and/or in 1936 (annual reports after the 2014 edition). The bottle shape and label design are replicas of the original product from Moët (1743), Richard Geoffroy has been working for Dom Pérignon since 1990 (weblog, 2017), the communication positions him as a successor of Pierre Pérignon himself.

USE OF SYMBOLS: the bottle and its label, the Latin inscription “Altum Villare”, the star and the grapevine crown, the Abbey of Hautviller, the name and figure of Pierre Pérignon, appropriation of King Louis XIV and the 18th century Versailles.

TRACK RECORD: associations with celebrities and royalty, focus on making only quality vintage wines. E.g. “Doris Duke, Marilyn Monroe and, so it's told, James Bond savored the wine that bears his name” (New York Times, 2012), or the “Sun King” (LVMH website).

CORE VALUES: the brand’s values are purity, timelessness and mystery (Annual report, 2000) and its motto is “The power of creation” (Annual report, 2002).

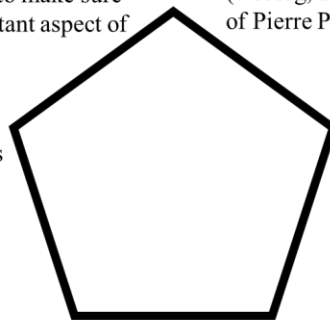


Figure 2 – Dom Pérignon Heritage Quotient

LVMH is a conglomerate formed in 1987 by the merger of Louis Vuitton with Moët Hennessy. It mostly grew through the acquisition of multiple smaller companies in the luxury goods sector. From a corporate brand perspective, LVMH has always been meaningful as a financial brand to investors and shareholders (Kerns, Fujinaka & Wernick, 2010). They have also managed to become increasingly relevant to multiple stakeholders over time: in arts (patronage and sponsoring activities since 1990), in human resources (launching the LVMH Institut des Métiers d'Excellence in 2014), and toward regulators (with their environmental policies since 1992 and their work against counterfeiting). They recently extended the corporate brand to a more general audience with the Journées Particulières LVMH (Open Days for the public in their product brand facilities) in 2011, 2013, and 2016.

Over time, the annual reports have devoted a greater space to heritage. To assess corporate heritage identity in the making, we use the three most important criteria for corporate heritage identities (Balmer and Burghausen, 2019) and show how LVMH meets them. Figure 3 summarises the evidence found in the systematic data analysis (a more detailed table using the original six criteria of Balmer 2013 is available in the appendix 2).

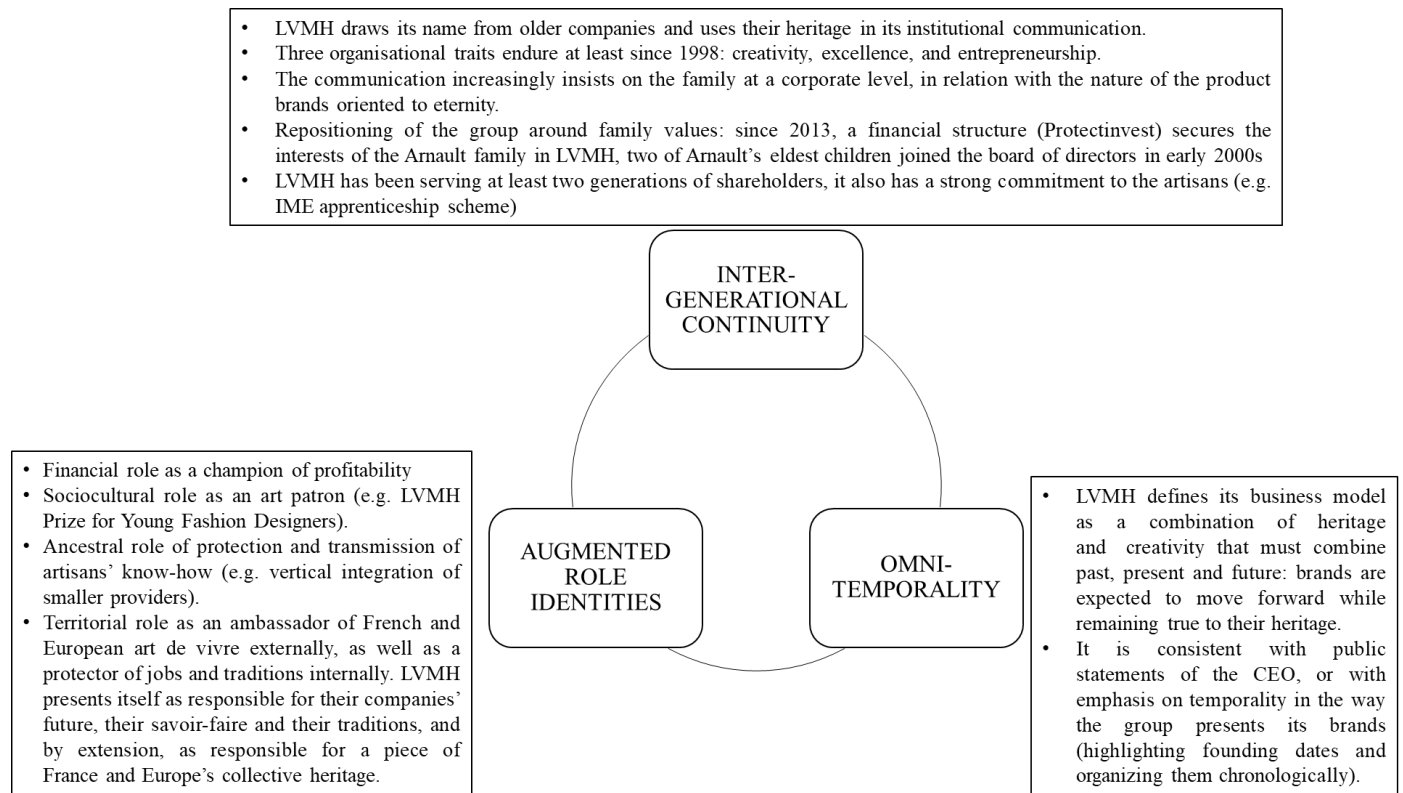


Figure 3 – LVMH Corporate Heritage Traits

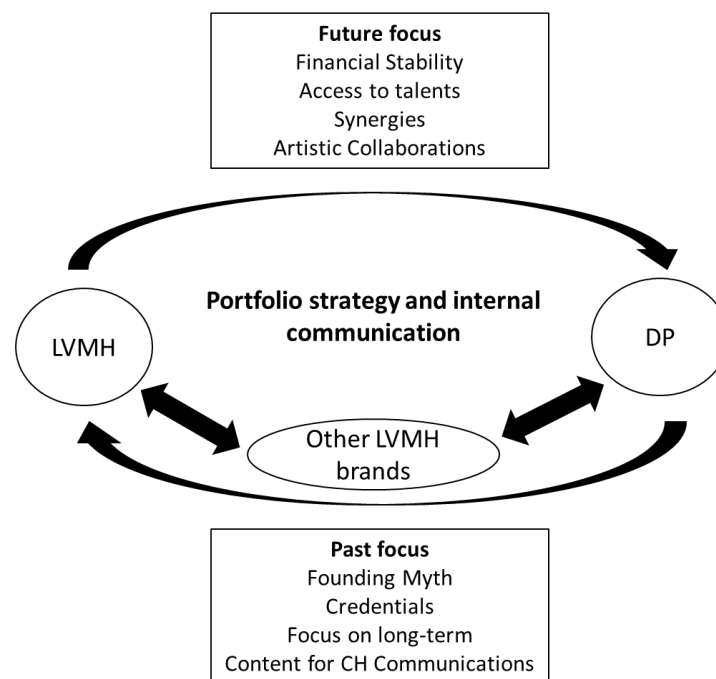
In sum, LVMH clearly engages in omni-temporality with a combination of past and future focus.

We find evidence of continuous organisational traits and unchanged core values. We also observe a repositioning around family values in the communication as well as in the corporate management and the ownership structure. The focus on long term is also visible through longevity in senior management, and the training and internal mobility to retain managers. Finally, the corporate brand has augmented role identities: financial, sociocultural, ancestral and territorial.

The dynamics between the corporate and the product brand

As a binary system, the LVMH corporate brand and the Dom Perignon product brand have a symbiotic relationship. Dom Pérignon supports LVMH corporate heritage claims by conferring longevity and historical legitimacy through its origin story and founding dates. This is consistent with the notion of structural heritage articulated by Hudson and Balmer (2013). On the other hand, LVMH supports the ongoing relevance of Dom Perignon to stakeholders through organisational and financial dynamics, and to consumers and influencers through its association with the fashion houses in the LVMH portfolio. This is consistent with the notion of omni-temporality articulated by Balmer (2011). Figure 2 is a visual representation of our main findings in this regard.

Figure 4 - LVMH - Dom Pérignon induction of omni-temporality



Past focus: Dom Pérignon legitimizing LVMH corporate heritage claims

Dom Pérignon plays an important part in LVMH portfolio as informant C explains: “Our history is one of the most relevant stories of the group, the character, the person involved and the passage of time in the champagne product make us unique and essential as a contributor for the luxury and 'savoir faire' of the LVMH group”. More specifically, our analysis identifies four dimensions of Dom Pérignon’s contribution to LVMH corporate heritage claims.

The first is to provide the group with a founding myth, which gives the group legitimacy on the luxury market. The figure of Pierre Pérignon is at the origin of the corporate mythology. The group compensates for its lack of objective longevity as a corporation (history) with the appropriation of Pérignon’s legend (roots). Other product brands with charismatic founders or legends associated (such as Louis Vuitton) serve the same purpose.

Second, Dom Pérignon, as other star brands, provides credentials for the LVMH management style. Internally, they set an example for younger or less successful brands in the portfolio. Top managers use it to show how newer brands can mature. Externally, these brands provide evidence of LVMH good intentions for other acquisitions. For example, the CEO quotes Dom Pérignon in the media as a proof of LVMH respect for heritage brand management in the context of the acquisition of Chateau d’Yquem: “Mr de Lur-Saluces tells the world about how little care we would provide its products, which is inaccurate and completely opposite to our intentions. By the way, he can be proven wrong by the quality work we have been doing in Champagne, particularly with Dom Pérignon” (B.Arnault in Le Monde, 1997).

Third, Dom Pérignon, as other star brands, legitimises the group’s focus on long-term management as well as the narrative on creativity. Out of the many brands they could use to justify their focus on the long term, Bernard Arnault likes to juxtapose Dom Pérignon with current trends: “I can guarantee that in one century people will drink Dom Pérignon. I am sure of

it," he said. "What type of Internet will they look at in one century? I'm not so sure." (New York Times, 2000). Presenting its products as being virtually eternal serves to justify a focus on long-term management at a corporate level (from a financial or HR perspectives), including the recent importance of family control over the group. Dom Pérignon also feeds into the narrative of creativity and reformulation at the core of the corporate brand values. Pierre Pérignon is presented as a creator in order to tie together heritage and innovation.

Fourth, Dom Pérignon provides content for the recent corporate communications on heritage and feeds in the augmented roles of the corporate brand. The Hautvillers Abbey is a UNESCO-classified site (Annual report, 2015) connecting the company's heritage with collective memory and the corporate brand to a terroir (Spielmann et al., 2019). This is obvious in the *Journées Particulières* promoted at a corporate level and consistent with the opening of locations such as the Abbey to the public: "During Les Journées Particulières, visitors will be able to enter the recently refurbished Hautvillers Abbey and discover its history. They will also enjoy a privileged view of the vineyard, visit a plot of young vines, and learn about the life of Dom Pierre Pérignon and his principles of champagne-making." (Journées Particulières, 2013). The product brand provides the material elements (buildings and artefacts) to make LVMH discourses on heritage more tangible, legitimate, and credible.

Future focus: LVMH facilitates Dom Pérignon's relevance

While Dom Pérignon helps LVMH in its claims for a corporate heritage in a bottom-up movement, we also find a top-down movement in which the corporate brand secures the future of the product brand. "There is a crucial knowledge transfer from a Luxury Group to a historical brand such as Dom Pérignon, LVMH is the luxury brand and some understanding about it has

been instilled in the way the brand communicates, style and creativity, the use of celebrities, exclusive elements and high-end elements change the way of showing the product” (Informant B). Again, our analysis highlights four key dimensions in this knowledge transfer.

The first is the financial stability that allows product brands to take risks and to invest. LVMH’s role originally focused on the financial aspect: it is expected that product brands concentrate on creativity and leave the financial aspects to the corporate level with a clear distinction between the designer and the manager. Removing the financial burden from the product brand manager consequently increases his or her ability to engage in audacious and creative activities, rather than remaining in the comfort of its traditions.

The second dimension is the access to a network of talent, thanks to the focus of LVMH on being an attractive employer and its role towards artisans. LVMH has maintained strong relationships with schools for a long time, in business but also in craftsmanship. It ranks as one of the most attractive employers in Europe according to several institutions such as Universum (Annual report 2012). The corporate brand manages the LVMH Institut des Métiers d’Excellence in 2014, which arguably facilitates the access of its Houses to a new generation of craftsman in the future. Again, these actions are easier to develop at a group and corporate level than for individual brands. They facilitate access to young talent and enhance the future focus of the product brand.

Third, LVMH provides synergies in purchasing raw materials, taking actions against counterfeiting, and managing the supply chain. In 2011, the *Financial Times* estimated 60 full-time employees were handling counterfeiting at LVMH. They also handle compliance with recent environmental and societal norms and make sure each company is involved (Annual

report 2002; 2010). These are not directly related to heritage, but they allow the brand manager to focus on the product and on creativity.

Finally, product brands benefit from the sociocultural role of LVMH as art patron. They have access to a large network of artists and designers for their advertising and public relations campaigns. This is key in the actualisation of heritage. Dom Pérignon recent artistic collaborations (eg. Marc Newson in 2006; Jeff Koons in 2013; Central Saint Martins in 2010) relate to LVMH's connections and partnerships in the artistic environment. LVMH encourages its brands to collaborate in order to meet objectives of creating new products. It also facilitates such collaborations by providing access to famous artists and designers.

Institutional processes make this dynamic happen

At a strategic level, the LVMH business model grants autonomy to its Maisons and the decision to favour internal mobility. Because it is not centralised, the LVMH business model allows each brand to preserve its own heritage. We focus on the Dom Pérignon case, but this observation would apply equally to other product brands from the LVMH portfolio: “History is part of the Marketing strategy, we can't do anything without it” (Informant D). LVMH usually puts a designer or creative director in charge of each brand, such as Richard Geoffroy for Dom Pérignon. The creator is responsible for making the most of the heritage in an innovative way: “Some of our ‘Maisons’ are more than two centuries old and each one has its own, unique culture which has transcended time. In every case, this heritage serves both as a powerful anchor and a cornerstone of long-term success. It is absolutely essential to preserve the values which make our brands unique, while help them transition to embrace new ideas and initiatives, allowing their modernity to flourish” (Annual report, 2011). LVMH has also favoured internal mobility for a long time. Nearly two decades ago it was described as “a primary way to develop

competences” (Annual report 1998). This was corroborated by internal figures, nearly 50% of the management positions were filled by internal transfers as in 2003, and this increased to nearly 70% in 2010 (Annual reports 2003; 2010). It is also confirmed by an interviewee: “as a group there is always a potential internal movement, some markets are similar and talent exchange creates value for the brand” (Informant C).

At an operational level, the company holds interbrand workshops and organises and funds training centres such as the LVMH House in London, which helps the exchange of information between the product and the corporate levels. These activities involve Dom Pérignon as well as other brands from the LVMH portfolio. We have identified different kinds of training including “special assignments” developed in 1999 to encourage temporary missions for a different product brand within the group (Annual report, 1999), induction days and “universe days” focused on one business unit, and interbrand seminars for new staff or for experienced managers. Their purpose is to share good practices and to reinforce corporate values such as innovation. “Universe” days (perfumes, jewellery, champagne, leather goods, etc.) were also initiated in 2005 to provide our employees with a real introduction to a different professional world and to give them an opportunity to expand their sources of inspiration and innovation” (Annual report, 2005).

DISCUSSION

Our results have three main implications for corporate heritage scholarship. First, they show that heritage and omni-temporality can emerge from the dynamic between corporate brands and product brands. Second, they identify factors supporting the development of corporate brand

heritage within a younger firm. Finally, they inform managers by offering guidance about the appropriation of heritage from another brand.

The induction of omni-temporality

Our research purposely focuses on an unusual case. LVMH is a corporate brand in the position of being able to appropriate a very rich heritage belonging to its product brands. Building on brand architecture literature, and the corporate-product brand dynamic framework (Santos et al., 2016), we find that a sense of omni-temporality emerges from this dynamic. The corporate brand appropriates selected elements of the product brand heritage while the product brand draws on the corporate brand to update itself and project itself into the future. While the external perception might be that both corporate and product brands engage with omni-temporal strata, our study reveals an organisation in which each level seems to be primarily responsible for only one temporal stratum. It contributes to research on omni-temporality (Balmer, 2011) by suggesting that it can be attained through a collaboration between the corporate and the product brand levels. Instead of addressing all objectives at the same level, LVMH strategy seems to give each level responsibility towards a particular temporal focus that, when taken together, creates a perception of omni-temporality and relative invariance.

Based on the way LVMH and Dom Perignon induce omni-temporality (Figure 2), we can elaborate a conceptual model that could apply to brand portfolios in which omni-temporality is the result of a dynamic between two brand levels (e.g. a corporate and a product brand) (Figure 5). In this model, brand A provides a future focus, it takes responsibility of the support functions allowing the firm to survive in its macro-environment, and it should encourage the reinvention of brand B. At the same time, brand B provides a past focus in the form of historical references and

temporal legitimacy, and it also has the resources to train brand A managers regarding the importance of stewardship. Further research could apply this model to other cases, for instance a corporate brand with a strong heritage lacking of relevance acquiring a younger company so as to update its heritage and achieve omni-temporality.

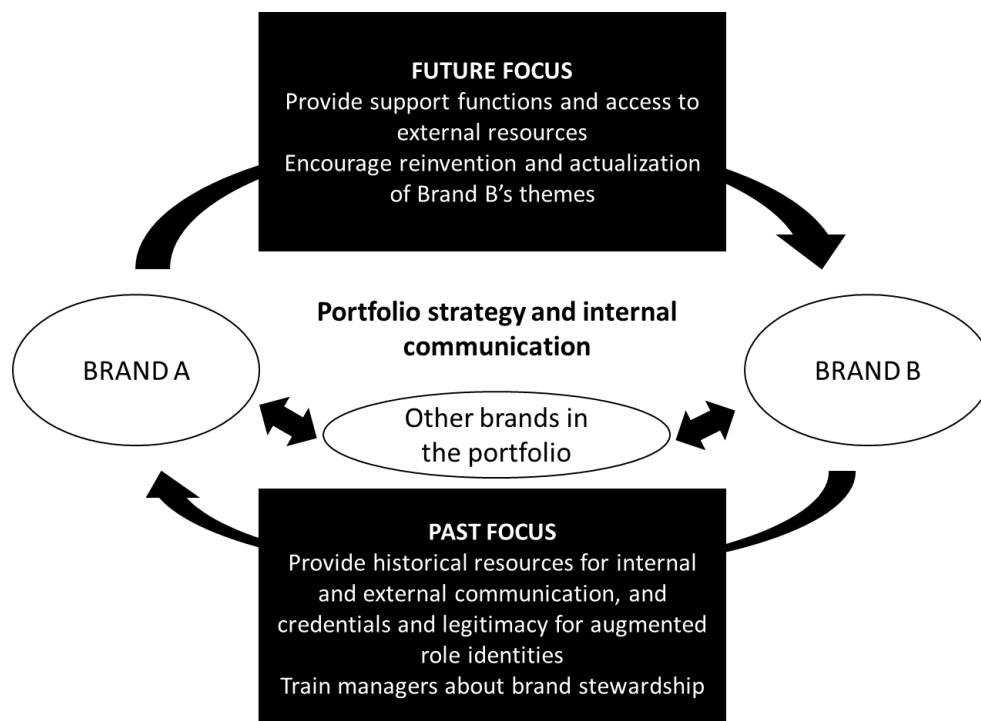


Figure 5 – Conceptual model for the induction of omni-temporality in a brand portfolio

In terms of brand architecture, these results show a hybrid case. On the one hand, LVMH remains a house of brands with the product brands driving sales (Aaker and Joachimsthaler, 2000). On the other hand, despite the absence of the name LVMH on its products, the model looks like a flexible umbrella brand with a large level of autonomy in the celebration of brand heritage, but also an omnipresent corporate brand in all of the back office and support functions (Kapferer, 2004). As discussed by Balmer and Gray (2003), the corporate brand focuses on stakeholders and brings an umbrella of trust (e.g. for investors, regulators and business partners).

The case of the induction of omni-temporality at LVMH points to more nuance in the relations between a corporate brand and a product brand. Although there is a hierarchy, the product brands enjoy here the privilege of the lineage, which gives them symbolic power and a role towards the construction of the corporate brand's legitimacy.

Elaborating on these results, we see great benefit in the alliance of heritage product brands with corporate brands such as LVMH. The group organises the outsourcing of many technical operations from the product brand management to the corporate level (eg. purchase, media buying, compliance with norms, finances). These synergies have obvious financial benefits, but they also concentrate attention and resources on the creativity and the protection of heritage at the product level. Omni-temporality is a paradox whose mastering requires significant work and dedication (Balmer, 2011). We suggest that brand managers could focus more on mastering this paradox while other consuming tasks are resolved at the group level.

Developing a corporate heritage brand

Our results show that LVMH intends to develop heritage at a corporate level. We identify three factors facilitating this intention and relating to prior research. There is the possibility of continuous family control, with the prospect of heirs remaining in senior management for more than ten years, which makes major changes unlikely in the near future. This confirms prior research on the role of family identity and ownership as a basis for the construction of corporate heritage (Blomback and Brunninge, 2013; Miller, 2014). Then, there is the economic context. The financial stability and the solidity of the group despite the recent crises confirm the decisions of senior management. It also allows them to develop a more complex corporate architecture, including spending resources on the diffusion of the values. This is a slightly different finding

from prior research looking at the emergence of corporate heritage identities during periods of economic uncertainty (Miller, 2014) or after a crisis (Cooper et al., 2015).

Finally, it seems impossible to disconnect corporate intentions from the corporate position on the luxury goods market. Other research shows how luxury product brands belonging to the same group appropriate cultural heritage to compensate for their own (Schroeder et al., 2015). LVMH could be a case of “heritage washing” in the same way companies engage in greenwashing, LVMH could make unsubstantiated claims of being interested in corporate heritage. The senior management may very well be using a corporate heritage discourse in a very utilitarian way, without any interest for other stakeholders, because it pays off in luxury and in the current context.

Beyond this, the LVMH case raises the more important issue of the possibility or impossibility of developing a corporate heritage identity. Existing literature has a rather aristocratic approach, whereby a corporate heritage identity is a privilege that is ascribed at a company’s birth. Whatever Bernard Arnault’s deep intentions, we believe it makes sense to give managers the benefit of the doubt, and to consider a meritocratic view of corporate heritage identity. In contrast to the aristocratic view, the meritocratic one posits that any company, whose managers are willing to work hard enough, can potentially build a corporate heritage identity over time and make a pedigree for themselves.

The literature states that companies decide to use their heritage based on strategic reasons (Balmer, 2017), on the socioeconomic context (Miller 2014), or the available resources (Blombäck and Brunninge 2009). Recent contributions also show the influence of the cultural background and of the place in which the brand is located (Smith and Simeone 2017; Spielmann et al., 2019). Finally, the activation and the implementation of a corporate heritage brand relates

to a particular mindset: managers should combine a focus on the long-term with a sense of responsibility (Burghausen and Balmer 2015). Our results suggest that this mindset can emerge over time through interactions between the product brands, the socioeconomic context, and the ownership of the company. Although stewardship is a stable concept, our results also highlight the importance of considering it in a dynamic reality. Companies that would not be engaged in this managerial mindset today could do so in the future. Our paper does not formally explore the implementation of the corporate heritage identity. However, based on the similar approach of another unusual case, further research could look in details about this ‘pathway to stewardship’ and identify stages or best practices.

Managerial contribution: a guide to appropriate a brand’s heritage

This case study informs managers interested in appropriating product brand heritage for corporate purposes, which builds on and confirms the model of Burghausen & Balmer (2014a). We find in the case of LVMH five characteristics that could be useful to other managers in a position to use the potential of product brand heritage. The first two appear to be prerequisite and the last three part of a subsequent process.

- 1) Hold a consistent brand portfolio operating in different markets, but targeting consumers with similar expectations. Reproducing this model is likely to be harder for companies operating in very diverse markets and addressing very different targets.
- 2) Maintain continuity in top management and in ownership, which appears to be a facilitator for the appropriation. Our data shows it is a long process occurring over 10 to 20 years.
- 3) Put in place a decentralised structure allowing autonomy at a product brand level, so managers can preserve and use their heritage in the positioning of the product brand.

4) Encourage internal mobility as well as the transfer of experience, and make it possible through forums and HR policies (trainings, internal magazine, inter-brand exchanges). This makes the heritage of one product brand available to other employees. They can then validate and articulate it at a corporate level.

5) Create a synthesis to make the product brand heritage elements relevant at a corporate level. For example, by using material elements or legends to reinforce a corporate core value. This part of the process helps other employees relate heritage to other activities and adopt heritage as part of a corporate identity.

Further research

A limitation of our conceptual framework is that our research is based on a single case study. It seems logical that the appropriation of Dom Perignon's heritage by LVMH is also happening with other product brands from the portfolio. We bring evidence of interactions between the product brands, orchestrated by LVMH, but this would require further scrutiny. It would also be interesting to contrast the interactions between LVMH and Dom Perignon with similar pairs in other conglomerates. We identify three facilitating factors (family control, financial stability and the luxury focus), but further research could investigate other cases (such as Kraft Heinz) that do not satisfy these three factors in order to evaluate their role. Finally, the decision to remove all mention of Moët in packaging and communications for Dom Pérignon, and the other liberties taken by LVMH are a clear case of invented or mythical heritage (Brunnninge and Hartmann, 2019; Hudson and Balmer, 2013). As our focus was on the current discourse rather than the historical accuracy, we did not engage with the disentanglement of genuine versus faux heritage. However, the effect of such historical arrangements on stakeholders' perceptions and reactions is

a promising avenue for further research. We relied on publicly available information (Cooper et al., 2015) and secondary historical sources, but obtaining access to archives from the LVMH period after 1987 (such as executive notes, emails, PowerPoint presentations or meeting minutes from the LVMH house) could help determine whether the process identified in this paper was the result of a strategy at the corporate level, or if it emerged more organically.

Conflict of interest: Two of the authors worked as executives and consultants in the hospitality and luxury sectors. They interacted with the Dom Perignon brand and other brands now controlled by LVMH in their capacity as advisors and supervisors of buyers. This occurred several years before the research was conceived or conducted. None of the authors worked for Dom Perignon or LVMH itself.

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