

MASTER INTERNATIONAL MANAGEMENT

European Business Realities

September, 2011

HERITAGE BRANDS

How corporate heritage and brand stewardship contribute to the valorization of brand image and strengthen corporate marketing ?

THE CASE OF RÉMY MARTIN



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Nowadays, a company has to face two situations : an environment with multiple and perpetual stimulus, and a consumer who is more informed and more educated. In parallel, the interest for our modern society for historical heritage generates new needs. Thus, the identity of companies is supported by an historical force which allows differentiating from the competition.

The Comité Colbert is an association of 75 Houses of French luxury whose purpose is to share and promote together, in France as well as internationally, a certain numbers of values : tradition and modernity, savoir-faire and creativity, and history and innovation. For this association, the UNESCO definition of the term “cultural and immaterial heritage” takes all its sense as the Houses taking part of the Comité Colbert represent the diversity of the crafts and constitute the French “art de vivre”, national cultural identity which is acclaimed worldwide¹.

The purpose of this study is to show how the historical resources can enforce the brand identity and create desirability among consumers. By building a strong brand and identity, companies will thus use their competitive advantage as a key success factor to create added-value to the customer and at the same time to the company.

My experience in the company *Rémy Martin* helped me a lot in analysing the current situation of luxury brands willing to communicate on their *savoir-faire* and to enhance their history and values in order to justify high prices and consequently to distinguish themselves from competitive brands with a price sensitive strategy on an international scale.

¹ http://www.comitecolbert.com/internet/index.php?option=com_content&task=view&id=333&Itemid=315&lang=en, Press clipping « Luxe, Savoir-Faire et Patrimoine », Comité Colbert, 2005, p. 4.

ACKNOWLEDGEMENTS

I would like to sincerely thank all the people whose collaboration and valuable support helped me for the realisation of this Master's thesis.

First of all, I'm grateful to Professor Paul-Marc COLLIN, my thesis supervisor and the Director of my program, who was supporting me so nicely during my internship and my work on the thesis.

Secondly, special thanks are due to Madame Pascale Rousseau, my internship supervisor and the Manager of Rémy Martin's communication, heritage and receptions, for all the support and guidance given throughout the process of my thesis. I would also like to express my gratitude to my colleagues for their constant support and friendship during my work experience.

Then, I will not forget people of my entourage, relatives and friends, for their optimistic support which inspired me in many ways and contributed to the achievement of this thesis.

Finally, I would like to thank the people who accorded me some of their time in order to answer my questions and thus to complete my thesis.

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LEGEND

ATL – Above The Line
BNIC – Bureau National Interprofessionnel du Cognac
BTL – Below The Line
CEO – Chief Executive Officer
CRM – Customer Relationship Management
HOC – Heart Of Cognac
HQ – Heritage Quotient
PR – Public Relations
RC – Rémy Cointreau
RM – Rémy Martin
RSP – Recommended Selling Price
UK – United Kingdom
VCP – Veuve Clicquot Ponsardin



« Le passé éclaire les générations à venir »



1 CHAPTER : RESEARCH FORMULATION

The purpose of this chapter is to introduce the Reason of research, to determine the Research objective and to describe the structure of this thesis.

1.1 Reason For Research

The topic of my master thesis is mainly based on the missions I have been realising within the House of Rémy Martin, that is to say the valorisation of the Brand Heritage of the House Rémy Martin, the management of the historical resources and the setting up of a pictures database management system for the transfer of artwork documents and information about the relating rights, as well as for an optimal use within the different internal or external departments of the Rémy Cointreau Corporation. This implies the organisation of a sharing system accessible to the different markets and actors of the corporation. For instance : the US and Hispanic Communication department for the exchange of best practise in Public Relations ; the Asia Marketing department with China which is in fond of French luxury products, and India as a promising market ; the Legal department for the follow-up of the intellectual property rights and the brand protection, the will of the Management to communicate about the brand image and the rich history of the company.

In nowadays competitive markets, branding creates a way to identify a product or a company with an emotional attachment. Indeed, a successful brand combines an effective product, added values and a distinctive identity by meeting the functional requirements of consumers and certain of their psychological needs ; it also creates a perception in the mind of the customer that the brand is of higher quality or more desirable than similar products from competitors. The brand becoming the basis for competitive advantage and profits, many companies would then see the importance and benefits of owning a strong and memorable brand.

Another related concept is the one of 'Heritage brands'. It is defined by the Journal of Brand Management² as a "dimension of a brand's identity found in its track record, longevity, core values, use of symbols and particularly in an organisational belief that its history is important". A heritage

² Urde M., Greyser S., Balmer J., "Corporate brands with a heritage", Journal of Brand Management", vol. 17, n°1, published online 27 July 2007, p. 4-19.

brand has a positioning and a value proposition based on its heritage. It is related to corporate brand as the heritage may reside in a brand by nurturing, maintaining and protecting it through the management mindset in order to generate stronger corporate marketing.

1.2 Research Objective

The purpose of this study is to show how effective brand heritage and brand stewardship can contribute to build a strong brand image and thus strengthen corporate marketing. Moreover, it is aimed to provide evidences that historical resources can enforce the brand identity and create desirability among customers, the strong brand creating value to both the customer and the company.

Indeed, my experience at the company Rémy Martin helped me a lot in analysing the current situation of luxury brands willing to communicate on their *savoir-faire* and to enhance their history and values in order to justify high prices and consequently to distinguish themselves from competitive brands with a price sensitive strategy on an international scale.

After defining the heritage as a part of the corporate brand identity, the objective of this research will be to explain why and how to enhance the brand heritage, notably through the management mindset of the brand stewardship, to generate a strong corporate marketing strategy and face global competition.

1.3 Structure Of The Research

This thesis will be divided into five chapters, with a first chapter that will give an introduction to the Research formulation.

The second chapter refers to the Literature review : a description and approach to the main concepts related to corporate brands, such as heritage branding, brand loyalty, cultural branding, brand stewardship and corporate identity.

The third chapter relates the Conceptual framework to the Objectives of the research and will also suggest an investigation model.

The fourth chapter is dedicated to the introduction of Rémy Cointreau Corporation, its history, the industry where it operates as well as its products and brands.

The fifth chapter presents the main characteristics of the Case study Rémy Martin, one of the luxury brands of Rémy Cointreau, and determines the Methodology research.

Finally, the sixth chapter presents the discussion of the theoretical and practical implication of the results with the main findings obtained, the limitations of the methodology and recommendations for future research.

2 CHAPTER : LITERATURE REVIEW

The objective of this chapter is to give an overview of the general concept of Branding and the specific concepts related to Corporate brand and Heritage.

2.1 Introduction to Branding

2.1.1. Definition of a brand

The concept of branding is generally connected to the definition of a product. According to Philip Kotler, a product is anything that can be offered to a market for attention, acquisition, use or consumption that might satisfy a need or a want. He also defines a brand as the name, associated with one or more items in the product line, that is used to identify the source of character of the items.

A brand can also be defined as a distinguish name and/or symbol, such as a logo, a trademark or a package design, that identifies one seller's good or service as distinct from those of other sellers (definition of the American Marketing Association).

The reason a product is differentiated from a brand is that it allows differentiating from competition, it is a source of revenues and income and it secures continuity of business and consumer perceptions. A brand is seen as the promise of a company to the consumers, what it will do for them ; the more consistent the promise is, the more successful the brand is. A brand is a set of properties and associations arising from a particular combination of attributes, benefits and marketing efforts that give the product a specific meaning. As a matter of fact, a brand is a value to both the consumer and the company represented by brand equity.

A brand strategy will be developed by the company in order to position and identify the brand with positive product benefits to attract potential customers, create brand awareness and increase profitability. The development of product branding over the past decades is characterized by layers of added value built around the core functionality of the product to create and maintain distinction in a

particular market. As a matter of fact, brands are then the connection between a product and its existing and prospective customers.

2.1.2. Characteristics of a brand

Brands vary in the power they exercise in the marketplace. Indeed, according to Kotler, the power of a brand can be understood in term of its position in the mind customers. First degree will be the brands that are unknown to most buyers in the marketplace ; then, the brands for which the buyers have a degree of awareness and recognition ; following this, there are brands with a degree of brand acceptability ; the brands that enjoy a degree of preference ; and eventually, the brands that require a degree of brand loyalty.

As the customer is becoming more experienced nowadays, the brand will thus articulate various characteristics that are enacted and influenced by the company, and interpreted and redefined by the customer. Its main roles would be to refer to : legal instrument, logo, company, risk reducers, identity system, images in the consumers' mind, value system, and added value³.

2.1.3. Principles of a brand

In order to establish an effective brand campaign, it is important to focus on the following principles :

- Consistency : companies should leverage their consistency with a holistic approach, affecting not only the product or the brand but every single contact point between the company and its stakeholders.
- Clarity : having a clear vision, a clear mission, clear core values and competencies enables the brand to be more tangible and understandable. It should be easy for the company to communication on it, and easy for the stakeholders to understand it in order to position the brand relevance in their mind.
- Continuity : it is an important principle in order to develop both brand equity and trust of the stakeholders on the long term ;

³ De Chernatony L., Dall'Olmo Riley F. (1998), "Modelling the components of the brand", European Journal of Marketing, vol. 32, p. 1074-1090.

- Visibility : this refers to the increase of brand exposure and the development of brand awareness.
- Authenticity : related to the objective of creating the feeling for the customer to own a unique valuable product or service.

In addition to these principles, brand building will require a long term approach and a long term planning to be supported by the top management and executed across all managerial processes.

2.1.4. Functions of a brand

Brands have several valuable functions and those differ from the company's perspective and from the customer's perspective. Indeed, brands serve as markers for the offerings of a company ; for the customers, they simplify choice, give the promise of a particular quality level, reduce risks and thus engender trust.

Below is a table articulating the main brand functions that justify the attractiveness and value of the brand from a customer perspective (according to Kapferer) :

Table 2.1. : Brand functions from the customer's perspective

FUNCTIONS	CONSUMER BENEFITS
Identification	Originally a mechanical function to make sure that the brand is clearly seen and recognized, it concerns the essence of the brand and facilitates the purchaser in his decision process and consideration set → swift choice and gain time.
Practicality	Originally a mechanical function to make sure that the brand is practical and recognized, it concerns the essence of the brand and facilitates the purchaser in his purchase process for rebuy and straight rebuy → swift choice and gain time.

Guarantee	This function is to reduce the perceived risk irrespective of the place and time of purchase and consumption.
Optimization	This function is to reduce the perceived risk by offering the best product against the lowest total cost of ownership, and the best solution in its category.
Characterization	This function is to reduce the perceived risk by confirmation of self image and/or the image that you present to others.
Continuity	This is the emotional satisfaction function created by brand intimacy over a long period of time due to loyalty.
Hedonistic	This is an emotional satisfaction function ; the pleasure created by brand attractiveness, its logo, its communication and experiential remuneration.
Ethical	This is an emotional satisfaction function towards the brand responsibility related to its stakeholders and environment.

Source : adapted from Kapferer (2007)

One statement we can have from this above table is that the brand will work for the customer as a differentiation device through its visual appearance, such as shorthand devices and guarantees of consistent quality, and expressions of self-concept. Moreover, as mentioned previously, a brand will reduce the risk associated with making a buying decision, and add to social identity.

From the company's perspective, a brand should secure long term business and increase brand equity in a sustainable manner. In order to conquer a unique position in the mind of the stakeholders, below are 8 roles the brand should follow :

1. create brand loyalty
2. differentiate marketing
3. create preferences
4. create brand image

5. command price premium
6. increase sales
7. differentiate
8. secure future business

As a matter of fact, the main functions for companies are the positive benefits of brands on consumer product evaluation, the perceptions of quality and purchase rates that would increase consumer loyalty, the price premium that organizations can charge for strong brands, and a decreased price sensitivity.

The strategic approach towards branding shows that a further development is taking place in businesses shifting from the product branding to the corporate branding. In order to understand the emergence of corporate branding, we will first explain how to build a brand strategy.

2.2 From Brand strategy to Corporate brand with a Heritage perspective

The brand strategy specifies the direction and aim of the brand over the long term to maintain and build a sustainable competitive advantage over competitors. It is important to start with an accurate understanding of the business strategy in order to ensure a consistent brand strategy. In other terms, the corporate strategy and the brand strategy should be aligned in order to create stakeholder value. All things considered, brand strategy itself is the process whereby a company identifies which brand elements are necessary to create the appropriate and feasible brand proposition to the target group. Our goal here is to understand how to activate the process of corporate branding through the exploration of companies heritage as a part of corporate brand identity.

2.2.1. Brand elements

Brand elements and brand identity are often used next to each other to identify the brand, enhance brand awareness and facilitate unique brand associations that differentiate the brand from competition. The traditional key elements are a brand, a logo, a name, or a slogan. Those could be extended by the visual code with a set of trade-markable devices such as URL's, symbols, characters, spokes people, packages and signage.

A branding strategy often implies the selection of a brand name or a symbol that is an indication of pedigree and a guarantee of what to expect from the product ; in other words, a quality statement of a value-for-money signal. This component of a brand can contain words, numbers or letters. According to Clifton and Maughan, authors of the book called *The Future of Brands (2000)*, the brand name is considered as the most important element of the branding mix as it is the one element which should never change ; although the packaging designs may be updated, the advertising campaigns may change and the product formulation may alter, the brand name should always stay the same. Moreover, a well-chosen brand name can produce a number of specific advantages such as suggesting product benefits ; it helps to communicate quality and evokes specific knowledge structures associated with the brand. Eventually, a brand name can provide a customer with a symbolic meaning which assists in both the recognition of the product and the decision-making process.

However, a brand name is not the only contributing factor to a successful brand. Indeed, effective graphics and logos are recommended to support the name. Indeed, symbols and logos are deeply related to the brand identification of the company. They are an easy way to recognize a product, and if they are linked in the mind of the customer to corresponding brand name and product, it increases brand recall. Thus, they are great assets for companies that spend huge resources to promote brand logos and symbols as the raised brand identification and brand loyalty develop their brand equity.

Another factor contributing to the success of a brand is the slogan by building both awareness and image. Slogans are short phrases that communicate descriptive information about the brand. If they often appear in advertising, they can also play an important role on packaging and in other aspects of the marketing programs. Packaging will then represent a brand element in building brand equity.

Colour can also be an effective mean of creating and sustaining brand and corporate images in a customer's mind. It is an important component of corporate and brand building recall, such as logos, packages and displays. For instance, when purchasing a car, the customer will always take in consideration the price, the quality, and obviously the colour. Colour plays then a key role in the consumer's perception of products and brands, the consumer using colours as a mean to identify brands. Thus, the meanings associated with different colours are important to marketers as the tools used to communicate brand image are mechanisms of meaning transfer.

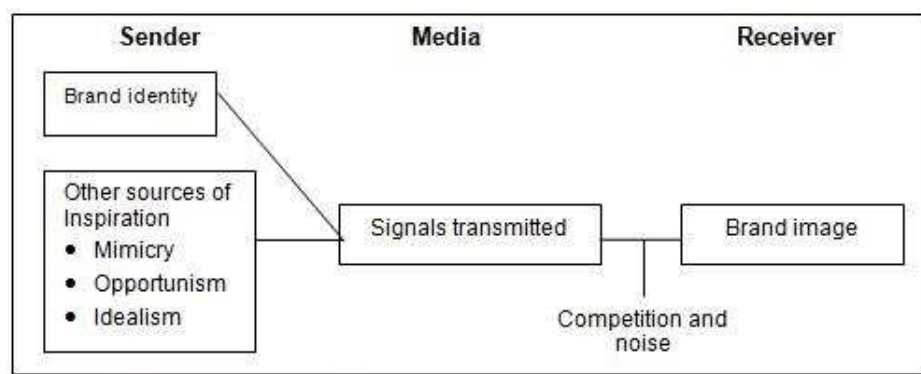
2.2.2. Brand identity

Brand identity is related to ethos, aims and values that present a sense of individuality differentiating the brand. It is a concept of vision and culture that drives positioning and personality. Thus, the vision and culture of employees affect the brand building process ; consequently, if employees play a role in shaping a brand's value, companies should pay more attention on internal aspects of branding.

Brand identity is one of the main drivers for brand equity as it provides strategic direction, purpose and meaning for a brand. According to the brand strategy Consultant Aaker, brand identity is “a unique set of brand associations that the brand strategist aspires to create or maintain. These associations represent what the brand stands for and imply a promise to customers from the organisation members. Brand identity should help establish a relationship between the brand and the customer by generating a value proposition involving functional, emotional or self-expressive benefits”. Also, whereas brand image can easily change over time, brand identity represents long lasting values of the brand.

Brand identity represents how the brand wants to be perceived ; it leads brand image and is situated on the sender's side. The way a brand is perceived by its customers is the key to its success, and driving positive brand association that customers know and trust asks recognisable brand associations in the mind of the customers. Therefore, the brand perception – the brand image – is always on the receiver's side. Below is a figure by Kapferer illustrating this point :

Figure 2.1. : Identity and image



Source : Kapferer (2007)

Aaker has developed in 2000 a brand identity model around 4 different perspectives and 12 dimensions. According to him, brand managers should have an in-depth understanding of the brand identity from different perspectives before they are able to clarify, enrich and differentiate the brand identity. The table below introduces to his brand identity model :

Table 2.2. : The 12 dimensions of the brand identity model

PERSPECTIVES : Brand as...	DIMENSIONS
... a PRODUCT → The product related attributes will by nature have an important influence on brand identity due to the fact that they are linked to user requirements and product experience	1. Product scope 2. Product attributes 3. Quality/Value 4. Uses 5. Users 6. Country of Origins
... an ORGANIZATION → Here, brand managers shift their perspective from product to organization attributes which are less tangible and more subjective. CRM, innovation, perceived quality, visibility and presence : those attributes can significantly contribute towards value propositions and customer relationship.	7. Organization attributes (innovation, consumer, concern, trustworthiness) 8. Local vs Global
... a PERSON → Perspective as if the brand was a human being ; this is a very distinctive brand element and extensively used in many brand equity	9. Personality (genuine, genetic, rugged) 10. Brand customer relationship (friends, adviser)

models.	
<p>... a SYMBOL</p> <p>→ This has to do with almost anything that represents the brand. A strong symbol can fulfil an important and dominate role in brand strategy ; symbols are very strong if they involve a recognizable, meaningful and trustful metaphor.</p>	<p>11. Visual imagery and metaphors</p> <p>12. Brand heritage</p>

Source : adapted from Kapferer (2000)

2.3 The concept of Brand heritage or how to strengthen Corporate marketing

Brand heritage takes part of the brand strategy as it is a dimension of a brand identity found in its track record, longevity, core value, use of symbols and particularly in an organisational belief that its history is important.

2.3.1. What is a heritage brand ?

If we take the basic definition of a brand we can define a heritage brand as a brand with a positioning and value proposition based on its heritage. One's should make the distinction with this concept as any brand with a heritage is not necessarily considered as a heritage brand. If we take the example of two famous brands in the watch industry that are Patek Philippe and Tag Heuer, both would be called as 'brand with heritage'. However, Patek Philippe - which has chosen to focus on and emphasize its history as a key component of its brand identity and positioning – would be classified as a heritage brand ; whereas Tag Heuer would not. Thus, making heritage part of a brand's value proposition is very much of a strategic decision.

Heritage brands are often described as the oldest brands in their respective categories. Aaker would describe them as brands with “the sincerity characteristics of being honest, authentic, wholesome, trustworthy, friendly familiar, caring and unassuming” ; he would also note that the identity equity in

such brands is extremely strong and valuable. A few synonyms for heritage brands are : legacy brands, icon brands, vintage brands or even enduring brands. The dilemma facing many strong brands is the one of being either a heritage brand with strength that continues to give both to its current customers and future consumers a reason and desire for the product – and in that case, its heritage would stay a strong asset of its overall brand equity ; either being a heritage brand that keep on appealing its current consumers only – and consequently, the attractive benefits of its heritage would shift to become a ‘handicap’.

Brand names, particularly those that are seen as strong and well-established, are often considered to be high in brand equity, and thus, cherished by consumers who loyally return for future purchases. The benefits of a heritage brand include having a trusted product, name recognition and well-established relationships. But this high consideration has a price ; heritage brands have to be nurtured over time, and customers need time to buy and uses the brand, as well as time to make the brand a part of their lives or even the brand from one generation to the next. A heritage brand is related to a status, a character, a social class and a history. They often use the form of a narrative or brand story in order to express their heritage, a heritage that they have had time to build with a meaningful and relevant past.

Nowadays, time appears to be quite relative in regard to heritage branding. Indeed, with the impact of technologies on marketing, we can identify six myths of branding according to Agnieszka Winkler⁴, with the first myth being that a brand is built over a long time. Some brands have been active for decades, even centuries if we think about some French houses of luxury, but others that are just a bit over 20 year old, such as Apple, have made flamboyant entrances. As a result, if brands can be built over time, however “time for high-tech products can be measured in nano seconds”.

Heritage brands have strong global roots. Indeed, in our consumption society characterized by increasing over-choice, consumers are looking for brands with genuine history and authenticity. This is partly connected to luxury goods branding as consumer of luxury goods brands, like Louis Vuitton or Chanel, may pay a particular attention to the country of initial origin. However, if those luxury heritage brands do not feel the pressure to be always new or different, they would nevertheless have to live up to their past heritage ; and this may be particularly difficult for those whose product creation has a propensity to vary like for instance the sector of wine with their challenging ongoing production.

⁴ Winkler A. (1999), « War-speed branding : the impact of technology on marketing », John Wiley & Sons Inc., 240 p.

2.3.2. Heritage as an integrated component of the brand's character

Heritage brand is a distinct branding category with its own set of defining criteria and a specific approach for effective management and leadership. Nowadays, heritage takes its importance through its facets within marketing literature field as we often talk about 'consumer consumption of heritage' and 'marketing of heritage'. From a strategic approach, when a company's brand is inspired by a heritage, this can provide leverage for that brand, particularly in global markets⁵. Furthermore, encouraging consumers to collect artefacts associated with brand heritage can foster consumer loyalty.

There are three kinds of branding that we can associate with heritage : Retro branding, Iconic branding and Heritage marketing.

Table 2.3. : The three kinds of branding associated with heritage

RETRO BRANDING	ICONIC BRANDING	HERITAGE MARKETING
It differs from heritage brands in the way that it is branding related to a particular period and often with a nostalgic character ⁶ . Here, the brand heritage draws from and clarifies the past, as well as makes it relevant for contemporary contexts and purposes.	Many iconic brands, culturally dominant and distinctive, are often categorized as heritage brands but are not necessarily ones. Here we can refer to the importance of mythmaking in the process of transforming a brand into an iconic brand ⁷ . Indeed, mythmaking is a benefit to it but it is not vital for heritage branding. However, it	This is often related to tourism and the heritage industry. It focuses on brands that are aligned to a particular period, and is retrospective-oriented.

⁵ Stewart-Allen A. (2002), « Heritage branding helps in global markets », Marketing News, vol. 36, n°16, p. 6

⁶ Brown S., Kozinets R., Sherry J.F. (2003), « Teaching old brands new tricks : Retro branding and the revival of brand meaning », Journal of Marketing, vol. 67, p. 19-33.

⁷ Holt D.B. (2004), « How brands become icons : The principles of cultural branding », Harvard Business School Publishing, Boston.

	can be a component of building and sustaining a heritage brand.	
<i>Example: Volkswagen's New Beetle.</i>	<i>Example: Nike</i>	<i>Example: the Austrian Sachertorte</i>

Source : adapted from Urde, Greyser and Balmer (2007)

But the overall idea of this study is taking in account those three kinds of heritage branding in order to understand how many heterogeneous organizations can use them as a strategic resource to generate value as part of their corporate marketing.

2.3.3. Heritage and history

The term of heritage is often compared to history. When analysing closer those two terms, we can find a contrast in the sense that history explores and explains what is often an opaque past, whereas heritage clarifies and makes the past relevant for contemporary contexts and purposes ; also, heritage helps to make a brand relevant to the present and prospectively to the future. Within the concept of corporate identity, it is important to adopt an historical perspective. Indeed, heritage that can be easily perceived to be of considerable antiquity ; however, it may also have a less glorious provenance or even may be sometimes 'fake' (in the sense of recreated) as tradition can be slightly invented by corporations. Thus, if history is a key corporate identity character, we can also note that business history can easily influence the emotions, attitudes and thoughts of stakeholders via the way corporations communicate about the company's history. Nevertheless, the historical roots of corporations and industries are of importance as somehow it also helps them to discover their future while examining their past⁸.

All things considered, one of the main differences between the history and heritage perspectives in corporate branding is related to the time dimension : if an historical overview is necessarily based on the past, corporate heritage brands take in account three timeframes that are the past, the present and the future. In this sense, the historical and distinctive characters of a brand are invested with meanings

⁸ Balmer J.M.T. (1994), « The BBC's corporate identity : Myth, paradox and reality », Journal of General Management, Vol. 19, n°3, p. 33-49.

and value that provide benefits to the brand communities of today and tomorrow in the same way as it did in previous decades or centuries.

2.3.4. Pertinence to Corporate marketing

The current focus on organizations beyond their products and services has brought new thoughts and practices in marketing. According to Corporate Marketing Professor John Balmer⁹, the concept of corporate marketing integrates corporate brands to the marketing mix elements as followed:

- **Corporate identity** → *character*
- **Corporate communications** → *communication*
- **Stakeholders** → *constituencies*
- **Covenant** → *corporate brand promise*
- **Corporate image and reputation** → *conceptualization*
- **Organizational cultures** → *culture*

The aim of a firm is to focus on references to values that are in favour of its image. In order to do so, it would apply the modern marketing and communication strategies with the purpose of changing the consumer's attitudes and strengthening its own image, notoriety, visibility and trustworthiness. The simple production of goods and services being not sufficient, it is now the experience offered to the client which creates the value. For any kind of event, an experience becomes memorable when it personally involves the consumer ; also, the desirability increases when the experience induced by the product, or service, is motivated by its customized aspect. Here, the participative modality involves the consumer by recognizing him/her as an active part of the process of nostalgic search for authenticity. Moreover, corporate brand management may be tightly associated to corporate marketing as it requires a concern with the themes of communications, identity, and constituencies for instance. Thus, the corporate marketing approach may be useful when considering corporate heritage brands.

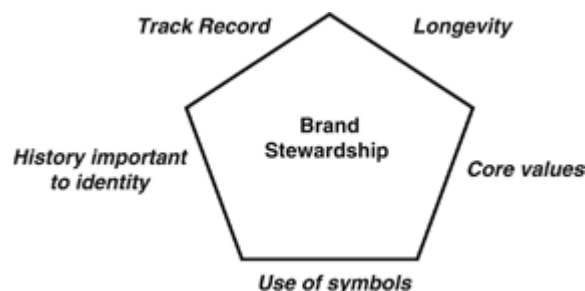
⁹ Balmer J.M.T. (2006), « Comprehending marketing and the corporate marketing mix », Working Paper, Bradford School of Management.

2.4 Defining the characteristics of a heritage brand

There is a history behind every brand, and some brands have a heritage, but only a few have made their heritage a valuable corporate asset ; for others, that value even remains hidden. Understanding what the heritage of a brand is may be the key to unlock its value for the company while enabling the brand's past and present to strengthen its future. Nevertheless, it is not compulsory for a company to be a heritage brand in order to be successful ; as well as the success of a company does not mean that it is necessarily a heritage brand. However, if heritage is part of a company's brand identity, it can indeed be valuable.

The purpose of this point is to show that a heritage brand can be recognized by the presence of different characteristics. We will see below and via the examples of some companies and industries that the more characteristics we will be able to point out in a brand, the more chance it is that the brand has a high Heritage Quotient (HQ). There are five main elements that indicate how much heritage may be present or potentially found in a brand : the more there are, the more important their presence is and the higher the brand's HQ is. All things considered, we will see that the concept of brand stewardship is the core of those characteristics and is then an essential management approach to nurture, maintain and protect brand heritage.

Figure 2.2. : The elements of Brand Heritage



Source : Urde, Greyser and Balmer (2007)

2.4.1. Track record

The company has a track record that delivers value to its stakeholders over a long time.

Here, the meaning of track record is related to the demonstration of performance, a proof that the company has lived up over time to its values and promises. Companies such as Nivea – synonymous with beauty and skin care – or Volvo – for safety – create and confirm expectations about future behaviour to different stakeholder groups ; the accumulated credibility and trust are then typically part of a heritage brand.

Also, heritage would provide such companies a legacy that offers them a timeless relationship to the market regarding its customers, society partners and employees. Thus, people would expect that the company will deliver these specific commitments over time.

2.4.2. Longevity

The company is a long-established corporation.

Longevity is not necessarily connected to a heritage brand but can be a key element notably for large multi-generational family-owned corporations such as Rémy Martin, Cointreau or Michelin. Longevity is the consistent proof that at least one of the other heritage elements, particularly track records and the use of history, is ingrained in the organization's culture by many Chief Executive Officers (CEO's). According to LVMH Group CEO Bernard Arnault, timelessness is an important brand attribute, but “the problem is that the quality of timelessness take years to develop, even decades. You can not just decree it. A brand has to pay its dues – it has to come to stand for something in the eyes of the world”¹⁰.

2.4.3. Core values

The company guides its corporate behaviour and choices according to policy and actions.

Some companies take in consideration the continuity and consistency of their core values to underline and define their corporate strategy and thus to make them part of their heritage. In the case of the telecom company LM Ericsson, there are three core values : professionalism, respect and perseverance.

¹⁰ Wetlaufer S. (2001), « The perfect paradox of Star brands : An interview with Bernard Arnault of LVMH », Harvard Business Review, Vol. 79, October 2001, p. 122.

Its CEO Carl-Henric Svanberg commented in 2006 upon the latter, saying that Ericsson has never left a customer nor a market in 129 years.

The long-held core values of companies are the base of their positioning expressed as a promise or an engagement in external communication, whereas guide behaviour and actions expressed their mindsets at internal scale. When core values fulfil the role as principles that the brand attempts to live up to, they are fully taking part of the brand identity and become an integral part of the brand's heritage over time.

2.4.4. Use of symbols

The company uses symbols to communicate about its history.

Some institutions use symbols to express their meaning and heritage. If we take the example of the sport-based company Nike, its symbol has become an internationally recognised symbol that both identifies the company and the signs it stands for. The meaningful use of symbols in communication is another field of heritage brands ; it deals with logo and design looks such as the pattern of Burberry, and for brands with high HQ, those symbols even achieve an identity of their own that stands for the brand, and will provide them a deeper meaning.

2.4.5. History important to identity

The company considers its history as a key element of its identity.

For some companies, history is an important key to identity : “who and what we are”. In the case of heritage brands, the history influences how they operate today and also choices for the future. If we take the example of Ikea, history is important internally even if it is not central to its external communications ; the management considers its history to be an important living part of the company. For the famous Swiss watch Patek Philippe, the establishment ‘since 1839’ is a vital part of its communications, heritage a key part of its advertising, as well as the chronology of the company history takes a prominent position on its website. As a matter of fact, one can really see that Patek Philippe's positioning incorporates a value proposition based on heritage.

2.4.6. Brand stewardship

Brand stewardship is at the core of those five characteristics of a heritage brand. It can be defined as “the leadership of and the accountability for the long-term well-being of the organizational brand equities” (Speak, 1998). Thus, a brand stewardship engages an executive leadership by articulating a vision for key market relationships, strongly influences the brand building process to the whole marketing process, and acquires the compromise of the whole organization to transmit the brand promises via every action taken ; it should eventually obtain brand-loyal customers.

All things considered, we can tell that the more these five elements are present in a brand, the higher its HQ will be. Furthermore, in higher HQ companies, heritage is important to the organization from an internal perspective, but is also perceived as relevant and valuable to their customers and non-customer stakeholders from an external perspective.

3 CHAPTER : CONCEPTUAL FRAMEWORK AND OBJECTIVES

In this chapter, we will give an overview of the conceptual framework and its related issues in order to reach the objectives of this research. To give a comprehensive and effective overview, we will also suggest an investigation model.

3.1 Reasons for a company to use its heritage in today's competitive environment

As we already noticed below, the heritage of a company does not create itself value ; it only gives the opportunity to do so. We will try to explain here why a company should use its heritage in today's competitive modern business environment, and why heritage is not simply attached to archival references like for instance the celebration of significant corporate anniversaries. Indeed, one would generally think that a company using and expressing its heritage can not be seen as an up-to-date, cutting edge, high tech and modern company.

The main reason companies with heritage should use it is motivated by the possibility to take advantage of differentiation that is :

- valuable for the customer and other stakeholders,
- distinctive for the brand, as well as
- difficult to imitate for competitors.

Below are three specific situations that give motivations for companies to use their heritage to compete in nowadays business environment.

1. Heritage can provide a basis for distinctiveness in positioning, and thus generate competitive advantage through higher prices and margins for instance, and even retain customers to whom heritage is meaningful ;
2. It can also add to the brand's value proposition with authenticity and credibility for the customer. A perfect example would be the automobile industry where some brands speak effectively to their consumers by connoting a heritage of engineering excellence, style and prestige (BMW, Mercedes, Chevrolet...) ;

3. But heritage can also help to build a special relationship with a range of non-customers stakeholders : for instance, some companies in difficult times that have to go through a sudden product problem and for which the company was not responsible ; or situations when heritage may make it easier to recruit executives and employees or even retain them.

If we take in consideration the five different elements that constitute a heritage brand, we can point out that they are most part of the time woven into the fabric of an organization, as well as its culture and memory. In parallel, those elements can also be part of the live of the company's stakeholders lives. Consequently, a brand with a heritage may become a heritage brand as soon as the company includes it in its strategic decision.

3.2 Finding, activating and protecting the heritage of a company

In order to manage heritage effectively, there are three main steps to follow : firstly, the heritage must be uncovered ; secondly, it must be activated ; and thirdly, it must be nurtured in a heritage-oriented approach from the management.

3.2.1. Uncover the heritage

The first place to look in order to uncover a brand's heritage is track record as it translates the demonstrated performance of delivering value to consumers ; for example, in customer-based beliefs about the company performance or in the company's own articulated statements long associated with the marketplace successes. It will be then considered as the most significant element of brand heritage.

The search for key elements of a track record may reveal a company what specific initiatives their customers and stakeholders have appreciated and valued over years, and which have been particularly successful in the marketplace ; thus, it would help the company to highlight these initiatives as 'what we do'. In parallel, the search for the underlying values may reveal a company 'who they are'.

Furthermore, when using the approach of track record and associated core values, with a focus on meaningful events in the company's history in order to identify its heritage, the most important criteria is the power of an event's meaning to stakeholders.

As a result, we could say that a pertinent way for a company to look for heritage is to examine its origins, articulates statements and long-held agreed-upon values. Moreover, it should try to find what customers have appreciated about them over the company over the years.

3.2.2. Activate the heritage

In order to determine which elements of heritage should be pursued, a company should focus on the following :

1. The corporate reality measured up in terms of heritage on each of the five HQ dimensions,
2. The company's differentiation regarding the strength of its heritage versus principal competitors in current or aspired marketplaces,
3. The way this company's differentiation will be translated meaningfully in the marketplace as a part of the brand's value proposition and positioning.

Careful and honest consideration will help in defining the best opportunities for where and how to use a company's heritage. The main means for activating a brand's heritage include product design, communications and the history of the brand itself. A good example is the long-running US corporate advertising campaign of Siemens, "That was then. This is now", demonstrating an effective translation of heritage for the present and future. This campaign initiated in the 90's compared a series of its discoveries and innovations from the 19th century history with recent advances in the same fields. The approach they used reflects a deep heritage that is successfully adapted to the present market, and confirms the argument that using heritage as part of current identity is not contradictory to being up-to-date. Eventually, the brand history itself will be also a tool to activate a brand ; it can come from the reactivation of a brand heritage from an earlier time, or from the acquisition of another brand.

3.2.3. Protect the heritage

Once the company has found and activated its brand's heritage, the next step is to extract value from the heritage. Nevertheless, it will need to have an established function in order to help the protection of this heritage. Indeed, if we take the example of an accounting company with decades-old core values rooted in integrity, it should not neglect its heritage or stray from it and should actually have a management ready to exercise the corporate brand stewardship role as a countervailing force to face reputation distress and subsequent financial disaster.

3.3 The prominence of brand stewardship

Companies with heritage should advise the incorporation of a brand stewardship function as part of using brand heritage, applying both to the leverage of heritage (and thus making heritage a successful asset) and to the protection of their heritage ; they should also have an explicit brand stewardship function and a corporate culture that serve the same function in the form of a protective approach.

Actually, stewardship is a mean to leverage brands for positive value creation via co-branding or choice of joint-venture partners for instance. In parallel, it is also a way to protect the equity of the brand and its symbols from exploitation (example : from potential negative associations or from overstepping the limits of the brand charter). Below are a number of actions associated with brand stewardship in behalf of heritage brands :

- The company knows that the brand is bigger than it is itself,
- The company is a link in a long chain,
- The company would like to leave and even stronger brand after itself,
- The company takes a long-term perspective that includes a knowledgeable retrospective,
- The company treats what has been done before with respect,
- The company has a focus on and an understanding of its core values and their link to heritage,
- The company recognises the value and importance of symbols and symbolic actions, and know how to use them with a consistent way to the core values,

- The company has the ability to know when to accommodate change that involves the brand's heritage,
- The company is ready to refuse things and take reference to its heritage, reputation and future as arguments, but also to agree with things when appropriate.

Thus, these actions can be related to four different ways of thinking that characterized how successful brand stewardship operates regarding heritage. Those four ways of thinking are described below.

1. ***A sense of responsibility*** : the broadest dimension of stewardship is the omnipresent sense of responsibility of the company. Indeed, the way of thinking of the company should such that the brand is considered as being even bigger than the company itself and need to be carefully handled with the heritage.
2. ***A long-term continuity perspective*** : this dimension, on behalf of the brand, is closely related to responsibility. It is present in a large range of institutions and illustrated that when the brand is assigned to responsibility, it has become part of a long process ; the management would then treat what has been done before with respect and want to leave an even stronger brand to the person who comes after ; there is a search for continued improvement.
3. ***A trust of safeguarding in your brand*** : as mentioned earlier, trust and credibility are key attributes of heritage. Maintaining trust is indeed an important element in stewardship for heritage brands.
4. ***A way of adaptability*** : it is important to safeguard brand heritage nevertheless it should not discourage changes and should even encourage adaptability through stewardship. Indeed, adaptability is a key to maintain the relevance of a brand over time like modifying a product or its positioning without affecting the underlying values of the brand meaning.

All things considered, we can say that brand heritage is a great corporate asset but unfortunately it is mostly not recognized and frequently underestimated. The five elements constituting heritage brands as described previously help to understand the process of uncovering, extracting, protecting and nurturing the value of a company's brand heritage. Heritage brand stewardship takes then all its sense and will be an important way for those companies to protect their heritage and foster a heritage-oriented approach.

3.4 Objectives of this research

The purpose of this research is to present the key steps in which companies should succeed in order to create a strong brand. In the further part of this thesis, we will take the example of the heritage brand Rémy Martin. The general objective of this research will be through the case study of one of the oldest and most prestigious brands of cognac to show how effective brand heritage and brand stewardship can contribute to build a strong brand image and thus strengthen corporate marketing.

Furthermore, it is aimed to prove that historical resources are key elements to enforce the brand identity and create desirability among customers, the strong brand creating value to both the customer and the company.

To conclude, there are a few questions companies should ask themselves if interested in finding and using heritage in their brand's identity :

- 'Do we recognize the heritage elements in our organisation ? And if yes, does it have meaningful HQ ?'
- 'Are we putting heritage to work as part of corporate positioning and communications to customers and non-customer stakeholders ?'
- 'If we are using heritage, are we unlocking and extracting its full value for the present and future ?'
- 'Do we have the corporate approach to nurture and protect our brand heritage ?'

4 CHAPTER : INTRODUCTION TO REMY COINTREAU

The main objective of this chapter is to provide general information about the luxury group Rémy Cointreau, its history, the industry where it operates and its products and brands. Rémy Cointreau is one of the French's leading players on the international scale and contributes significantly to the country's economy. It is also one the most prestigious brands in the wine and spirits industry.

4.1 Profile of Rémy Cointreau

Rémy Cointreau is a major operator in the world of wines and spirits on the international stage. It has a portfolio of high added value brands, including Rémy Martin, Louis XIII, Cointreau, Piper-Heidsieck, Charles Heidsieck, Mount Gay Rum, Passoa, and Metaxa. Furthermore, Rémy Cointreau has a worldwide presence.

In just a few years, it has achieved an in-depth repositioning of its brands focusing them towards the highest reaches of the market. This effort has mobilized the commitment of all the employees of the Group. On their key markets, its leading brands have achieved very good results and have gained a great reputation. Furthermore, in order for its brands to meet the requirements and specific aspects of the most high-end markets, the group needed to have a tight control over its distribution worldwide ; this decision to take back control over its worldwide distribution in 2009 was really welcome as it helped to lower the crisis difficulties in parallel, as well as adapt resources to growth opportunities in markets in Asia and in Europe.

All things considered, this dynamic portfolio, renewed and resolutely upmarket-oriented, should give Rémy Cointreau the ideal elements to conquer new markets. Also, the loyalty, commitment and quality of the work realized by the people of the Group is directly contributing to the success of its brands based on prosperity and long-term viability.

4.2 History of the Group

Although the history of the Rémy Cointreau Group begins in 1991 with the merger of Rémy Martin and Cointreau, it is to the 18th century at Cognac that one has to look to find the Group's roots. The Cognac house Rémy Martin was established in 1724 by two wine-growers. From the first to the fifth generations, Rémy Martin passed from father to sons to become, by the end of the 19th century, a trading house with an international reputation. In 1849 at Angers, in France, Adolphe Cointreau and his brother, Edouard-Jean, created the Cointreau liqueur and founded the first Cointreau distillery.



Rémy Martin is the strategic core of the Group's development policy : the continuous quest for quality in its Fine Champagne - exclusively Grande Champagne and Petite Champagne - brought it to be a leader in superior quality cognacs.

To improve this distribution network, Rémy Martin gradually enlarged its production and diversified into top of the range wine-based products, with the acquisition of two champagne houses : Charles Heidsieck in 1985 and Piper-Heidsieck in 1988. In 1980, the Group extended its interests in Bordeaux wines with the acquisition of the merchant houses De Luze and De Rivoyre, which were incorporated into the new company Grands Vins de Gironde (sold in 1999).

In 1989, other internationally known brands were acquired: the Italian liqueur Galliano, and Mount Gay Rum from Barbados. To have a more complete portfolio, a prestige Scotch whisky was required, such as the blended The Famous Grouse, and the single malt The Macallan. The network took on their distribution and marketing. Then, continuing its development, Rémy Martin merged with Cointreau resulting in the creation of the Rémy Cointreau Group in 1991.

This strategy of internationally known products and brands is led by two distribution networks, Rémy Amérique for the Americas/Caribbean region, held 100% by the Group, and the Maxxium joint venture established in 1999 to cover Europe and Asia. In 2000, the Group acquired the Dutch spirits group Bols, which completed and enriched the portfolio of liqueur brands and more particularly the Rémy Cointreau spirits. It also expanded its distribution capacity in Central and Eastern Europe where the Bols group already had a strong presence.

In 2006, as part of the accelerated implementation of the Group's value-added strategy, involving a new focus on activities around its key international brands in markets with high growth potential (i.e. the United States, Asia and global Duty-Free), they decided to sell off the Bols spirits brand. Finally, in 2009, Rémy Cointreau terminated its contract with joint-venture Maxxium and launched a new distribution network thus controlling 80 % of its business directly.

4.3 Vision of Rémy Cointreau

The business vision is to become number 1 in terms of value per case in the wine and spirits industry. In order to do so, the group focuses on the following points :

- Go from price parity with their competitors to price superiority ;
- Develop all necessary means for all of their brands to more rapidly develop the most expensive qualities ;
- Develop all necessary means for all of their brands to more rapidly develop markets where the value per case is the highest.

As a result, Rémy Cointreau's business ambition is to generate superior growth in profitability and a return on investment superior to that of their peers. Achieving this ambition would then secure the commitment of their shareholders to develop the company further.

The reputation of Rémy Cointreau Group comes from the reputation of its brands. Indeed, wherever they are present on the planet, their superiority builds on the content of their bottles, their eaux-de-vie, their wines and liqueurs. Their craftsmen are dedicated to the three following dimensions :

1. The true nobility of the ingredients that Earth has to offer
2. The mastering of time
3. The legacy of know-how passed on from one cellar master to another

Their vision regarding how to succeed is linked to the motto ‘We seek nothing but Perfection’ : to make the search for perfection successful, all Rémy Cointreau employees are invited to put perfection “at the heart of their role”. Also, the company concentrates itself on the following value system to serve this search for perfection :

4. Craftmanship
5. Rigor
6. Authenticity
7. Creativity
8. Sense of human contact

For the 2008/2009 fiscal year, Chairman Dominique Hériard Dubreuil and CEO Jean-Marie Laborde commented about their annual performance results and explained that although the worldwide economic turndown, specifically in the US and in Russia have affected their results in the second semester, the up-market characteristic of their products are proved they were their best asset ; and it must stay their priority. Indeed, within this period of recent changes regarding values and marketing models, their high quality products and their brands are reference models on the international markets and constitute an exceptional advantage. More than ever, the creation of value is an essential condition to preserve profitability, and the up-market segment confirms its growth and profitability ability, particularly in Asia. Furthermore, premium positioning is a natural requirement for Rémy Cointreau as it is linked to quality and their brands objectives are to constantly pursuing for renewal and innovations in order seduce their customers.

In parallel, Rémy Cointreau’s innovating marketing and promotional investments contributes to strengthen the attractive potential of their brand. Among those successful brands, we can refer to Coeur de Cognac and VSOP Frozen for which their cognac brand Rémy Martin reinvented the world of cognac and revealed new ways of tasting ; moreover, Metaxa who was celebrating its 120th

anniversary, created a limited edition of 1888 crystal carafes containing an exceptional old quality of Metaxa ; the new packaging of Old Reserve Mount Gay Rum was introduced along with a new communication campaign positioning the brand as the oldest worldwide rum among prestigious products.

As a conclusion, we can say that the success of the last strategic changes despite the sensitive economic situation shows that their commitments at long term perspective are definitely attached to the development of their brands and to maintain them as up-market, attractive and conquering.

4.4 Distribution network of Rémy Cointreau

The Rémy Cointreau's distribution network has been thoroughly restructured since 2008 in order to better support their premium strategy. The group has actively prepared its exit of Maxxium and has accelerated the transformation of its distribution network. This new structure is operational since April 1st, 2009, and is related to three objectives : strengthen its presence on its strategic markets, increase the flexibility and efficiency of its commercial organization and concentrate its team on up-market segments that are particularly exigent.

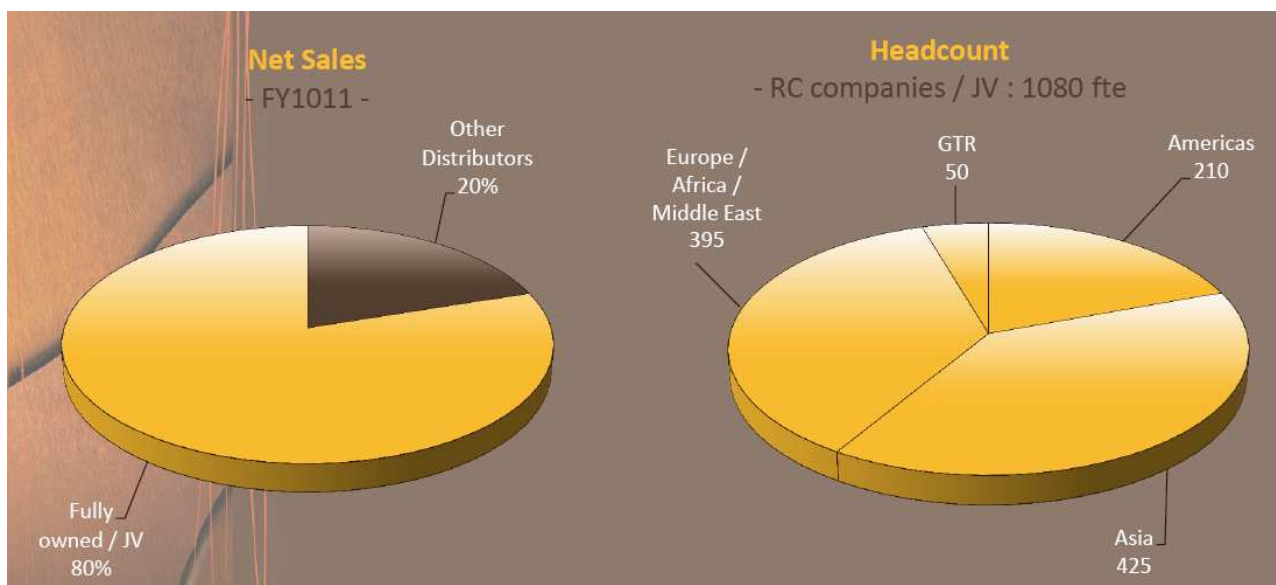
Figure 4.1. : Distribution strategy of Rémy Cointreau



Source : internal

In Pacific Asia, Rémy Cointreau needed to settle local and talented teams with a strong experience of up-market segment, as well as well ‘well-integrated’ within the regional area, armed in order to answer then needs and expectations of those markets with the creation of its own subsidiaries in China, Taiwan, Singapore, Vietnam and Malaysia. In Europe, the group has strengthened its positions, taking back over the subsidiaries of Maxxium in France, Belgium and Luxembourg, Czech Republic and Slovakia. Also, a joint-venture has been created in Germany with Underberg, and agreements have been assigned with up-market specialist distributors on all other markets.

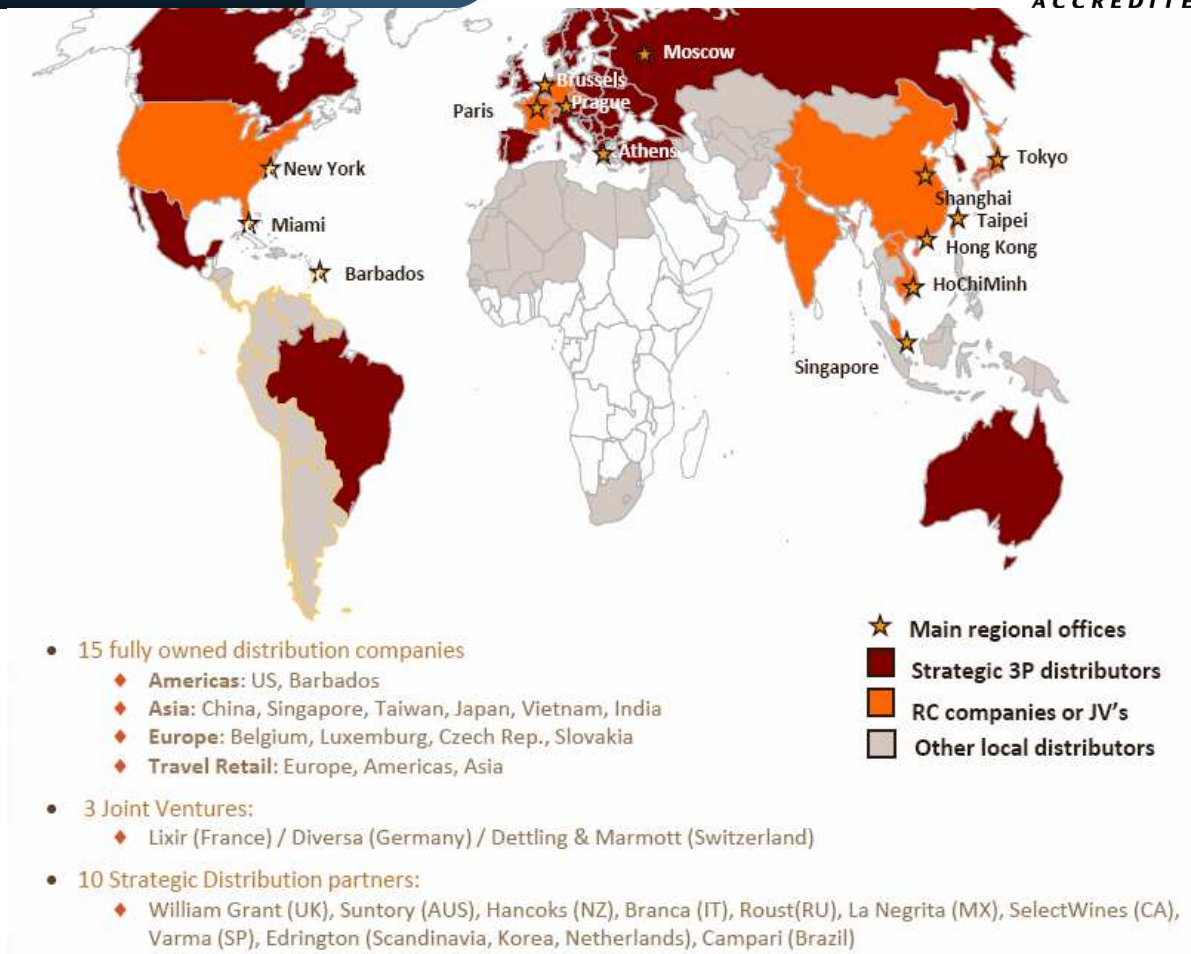
Figure 4.2. : Rémy Cointreau distribution repartition by sector in 2010/2011



Source : internal

Finally, in the Travel Retail, essential sector that builds the premium brands image, the historical savoir-faire of Rémy Cointreau allowed them to take back over the direct control of its activity : strongly experienced teams are travelling over the world and strengthen their tight relationships with main actors of the sector and the leading positions of their brands.

Figure 4.3. : Overview of the current distribution network of Rémy Cointreau



Source : internal

4.5 Key figures of Rémy Cointreau (2009/2010)

Table 4.1. : Main key figures

Turnover	€908M
Out of which non-group brands	€214M (*)
Gross profit Rémy Cointreau brands	66%
A&P investments	€171M
Current operating profit (COP)	€167M
COP in % turnover	18.4%
Net financial debt	€329M
Net Debt / EBITDA ratio	2.19
Employees	1,621

Source : Published rates – Champagne discontinued

- An outstanding profile

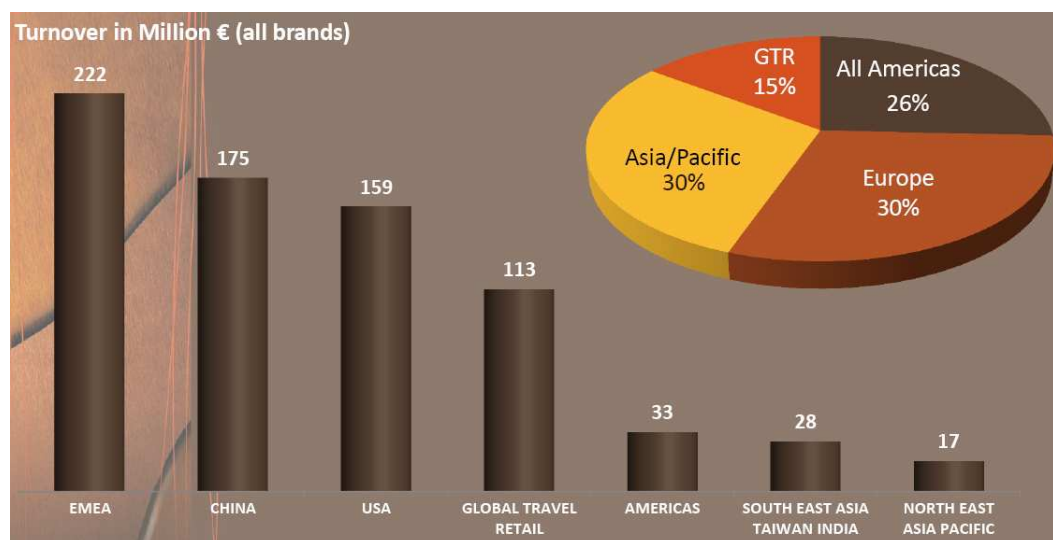
Figure 4.4. : Average worldwide RSP per bottle



Source : internal

- A balanced geographical mix

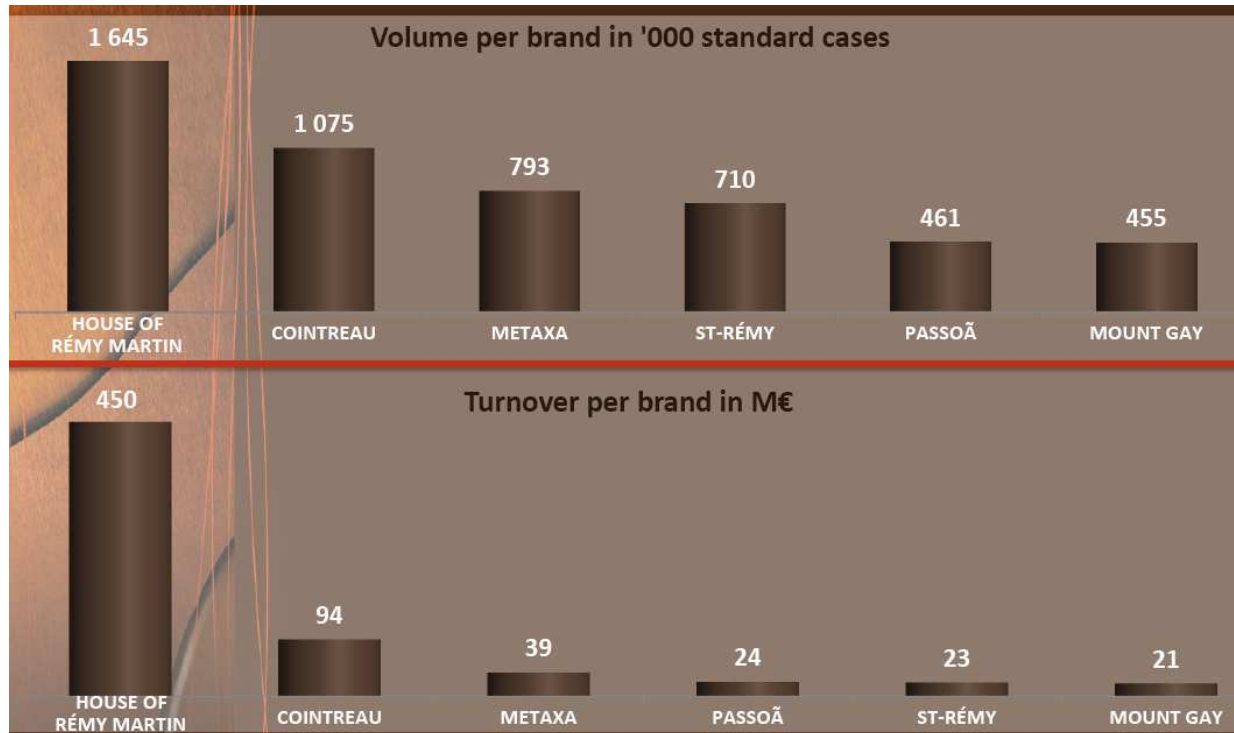
Figure 4.5. : Turnover in million all RC brands included



Source : internal

- A focused portfolio

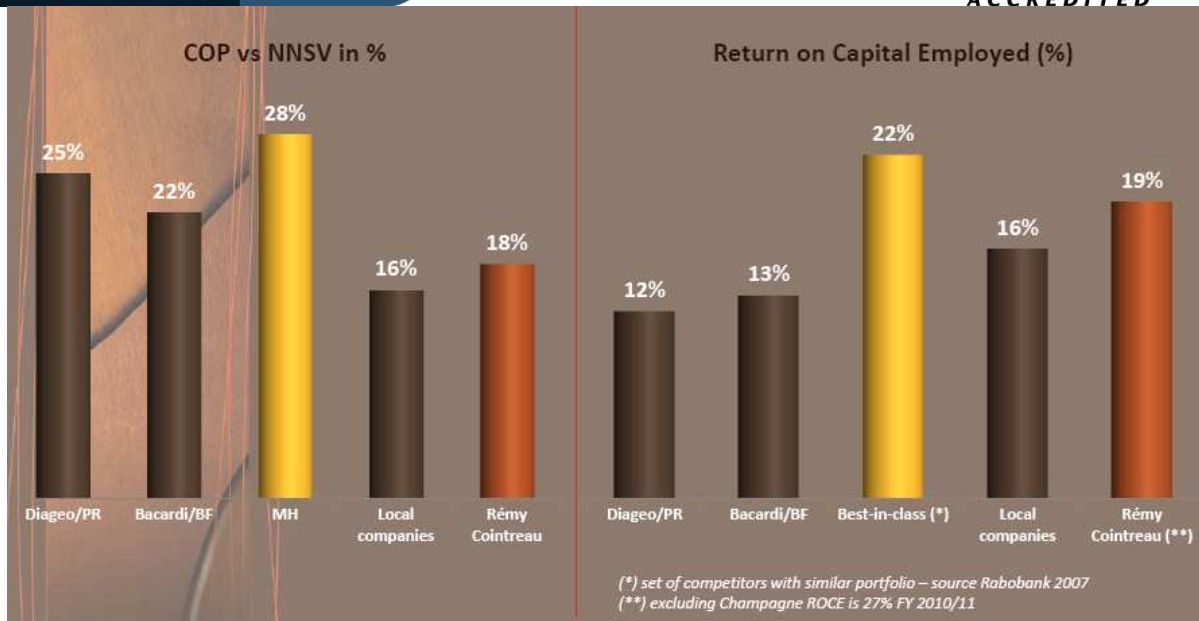
Figure 4.6. : Volume per brand in term of standard cases compared to turnover per brand in million euros



Source : internal

All things considered, we can definitely tell that Rémy Cointreau has made significant progress over the last years and this through price increases and mix improvements despite economic downturn. But despite those interesting financials, Rémy Cointreau still needs to upgrade to reach the best-in-class.

Figure 4.7. : Rémy Cointreau financials compared to the best-in-class



Source : internal

5 CHAPTER : THE CASE STUDY OF REMY MARTIN

As already referred in the previous chapters, one of the objectives of this research is to show how Rémy Martin is being a successful and powerful brand within Rémy Cointreau Group. Indeed, Rémy Martin is one of the most prestigious and strategic brands of Rémy Cointreau, and various studies showed that it is considered as the world's leading up-market wine and spirit brand within its sector, with customers located all around the world.

5.1 Brand history and fundamentals

There have been five generations of Rémy Martin wine and cognac merchants, each driven by the quest to capture the heart of cognac, and the current President of the Rémy Cointreau Group, Dominique Hériard Dubreuil, is the daughter of André Hériard Dubreuil, fifth generation of the Rémy Martin Company.



The history of Rémy Martin begins in 1724, when a young winegrower from the Cognac region founded his company. Rémy Martin is known as being at the 'Heart of Fine Champagne Cognac' ; the

eaux-de-vie from these crus, in the heart of the Cognac region, have the greatest ageing potential and are therefore treasured more.

In 1870, the mythical Centaur symbol was adopted by Paul-Emile Rémy Martin to represent Rémy Martin. It was the symbol of Sagittarius, Paul Rémy Martin's zodiac sign and it represented the alliance of man and nature, and ultimately the family's mastery of the traditional art of cognac making. The spirit of the Centaur has always inspired the Rémy Martin family who have remained faithful to the quest for excellence. Also, the adoption of the Centaur was a way to pass on the expertise, to make the house's products recognizable, and to give an avant-gardist approach of modernity with the logo ahead of its time.

In 1916, the family name became the name of the House ; it was also the beginning of the international development. The fifth Rémy Martin understood that in the future, producing a very fine cognac would no longer be sufficient, and that the House would also have to know how to sell it throughout the world as well as communicate about it. Thus, to ensure the continuity and the development of the firm, he turned the family name Martin into the Rémy Martin brand and went into partnership with Mr André Renaud.

In 1927, Rémy Martin launched its Fine Champagne VSOP which became an immediate success based on one differentiating point : superior quality. In 1937, the first steps to sell their cognac on the international stage, notably in the USA, were also a great success, with Rémy Martin quickly establishing itself as the official supplier of the Imperial and Royal courts. In parallel, Fine Champagne Cognac has been recognized as the only blend of two crus protected by the Appellation d'Origine Contrôlée, the French law of 1938 which officially recognises the complementary qualities of Grande Champagne & Petite Champagne to provide a unique quality of cognac.

5.2 The range of Rémy Martin's products



VSOP

1972

The iconic VSOP bottle is launched to worldwide, helping it to become the world's best-selling cognac.



XO Excellence

1981

Due to unprecedented demand, XO Excellence, the epitome of luxury and sophistication, was created.



Club

1985

Launch of Rémy Martin Club as a cognac reserved for the most exclusive gentlemen's clubs. Mature and concentrated, it reflects masculinity.



Accord Royal



Cœur de Cognac

2000

Launch of 1738 Accord Royal in the USA. Inspired by the original act of royal recognition by Louis XV in the 1738, Rémy Martin 1738 Accord Royal is the accomplishment of an enduring quest to reveal the Heart of Cognac. This cognac has a majestic smoothness and a unique mellowness.

2007

Launch of Cœur de Cognac in Western Europe. Rémy Martin launched a cognac designed for epicureans. Fresh, smooth, fruity, delicious and easy to drink, Cœur de Cognac is the yummiest cognac in the world.



1898

2008

Launch of 1898 in China. As the world's leading premium cognac brand, Rémy Martin is close to the heart of connoisseurs across the globe. 1898 Coupe Fine Champagne for those who desire new standards of luxury.



Centaure de Diamant

2010

Launch of Rémy Martin Centaure de Diamant in Duty Free shops. The Rémy Martin Diamant Fine Champagne Cognac contains rare grapes and flaunts traditional distillation methods and long maturation in Limousin oak casks. The Cognac uses between 300 and 400 different eaux-de-vie made exclusively with grapes from the Grande Champagne and Petite Champagne regions.

5.3 Positioning of the House Rémy Martin in the luxury industry

Rémy Martin is a luxury brand and like all luxury brands it is nowadays facing to a change in the way consumption of its customers and has to manage to adapt its global strategy to attract new consumers coming from emerging countries.

5.3.1. General overview of the luxury industry

When analysing the overview of the worldwide market of luxury brands, we can argue that although they are coming from different sectors and categories, and thus address different need, they all proceed in fact from a single aspiration, which governs this universe as a consistent group. According to a report from the Comité Colbert, luxury is above all an “art of living” that is organised around well-being and pleasure¹¹. In this approach, luxury values and practices such as high-quality services are as important to the consumer as the products themselves ; thus, the luxury value proposition should be considered as a whole, and affecting one part of the value proposition necessarily would affect the others. As a matter of fact, luxury sells not only a product but also “a moment of happiness” to clients who fully enjoy both the moment and the special attention that the salespersons provide them, making them feel unique while appreciating the beauty of the place itself ; and this somewhat mysterious combination would be what triggers pleasure and creates luxury.

5.3.2. Difference of consumer’s behaviour in emerging countries and western countries

Nowadays, large global luxury brands such as Rémy Martin, are well identified in all countries, and are for most part of them European luxury. Regarding the emerging countries, the luxury industry is growing quite strongly ; in mature countries, the potential for growth remains high such as what we found when we compared the penetration of luxury products in Japan to that in other developed countries. Moreover, within the context of the economic crisis, the luxury sector exhibits strong fundamentals ; indeed, in a shaken world, luxury presents lasting values of well-being and aspiration. Therefore, the luxury industry has a number of assets that allow foreseeing a favourable future with

¹¹ http://www.comitecolbert.com/internet/images/stories/Synthese%20Etude/12_2008_STUDY_European-Luxury-Industry-EN.pdf

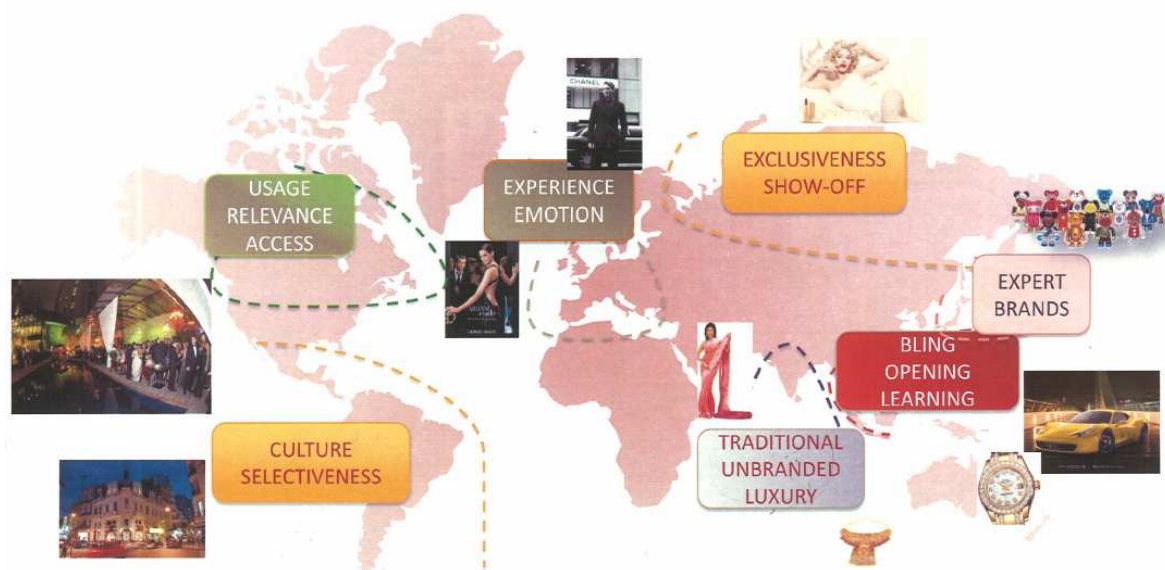
confidence. There are different perceptions of luxury between Western countries and emerging countries :

- Emerging countries are more consumerist luxury with a more important brands approach that is directly connected to status. They are also more enthusiasm but less expertise ;
- Western countries are more mature luxury focused on superior quality, personal reward, pure pleasure, and a life of beauty ;
- But the common dimension very present in both worlds is that Quality is critical.

Below is a luxury segmentation based on attitudes by geographical region :

- Hedonist luxury (pleasure, emotion, experience) : UK, US,
- Status luxury (rewards, brands, social success) : Germany
- Patrimonial luxury (history, tradition, origin, heritage) : Japan
- Social status (distinction, belonging) & patrimonial luxury : France
- Bling-Bling luxury : Russia
- Consumer luxury : China

Figure 5.1. : Different attitudes towards luxury depending on the region



Source : IFOP 2011

The perception of cognac is also different from one country to another (data extracted from a BCG ‘Opportunities for luxury’ survey, 2009) :

- **In France**, more than 50% of people would perceive cognac as being a product for connoisseurs, a third would think of it as an expertise passed down from generation to generation, and the rest would see it as a product with an exceptional taste. *Thus, we believe that in France, cognac as a quite negative image in general due to the old image it has ;*
- **In the UK**, almost 50% of people would be perceived cognac as a superior quality product, 39% as a product for connoisseurs, and 37% as a product with an exceptional taste ;
- **In Germany**, it is considered as being a product for connoisseurs at 45%, a superior quality product at 40%, and a product with an exceptional taste at 38%, *which shows that it is well-balanced in term of brand image ;*
- **In Japan**, 32% of people considered cognac as a prestigious brand, 31% as a superior quality product, and 30% as a *unique* manufacturing process (30%) ;
- **In Russia**, 40% of people think of cognac as a product for connoisseurs, 39% as a ideal gift to offer, and 30% as a *symbol of an affluent milieu* ;
- **In China**, 41% see it as a product with history, 41% as having specific origins, 37% as an ideal product for celebration (37%), and 34% as a *prestigious brand*.

As concerning the purchase criteria for cognac :

- **France** : the maturity or age of the product (54%), type of grapes used to make it (49%), *product or brand history* (47%) ;
- **UK** : taste/flavour (65%), the maturity or age of the product (49%), *brand reputation* (47%) ;
- **Germany** : *product or brand history* (45%), type of grapes used to make it (38%), maturity or age (37%) ;
- **Japan** : *product or brand history* (50%), good value for money (48%), types of grapes used to make it (39%) ;

- **China** : maturity or age of product (56%), *reputation of the brand* (48%), taste/flavour (39%) ;
- **Russia** : maturity or age of product (61%), *quality of the product* (55%), taste/flavour (52%).

5.3.3. The luxury industry in Europe or Why Rémy Martin should keep on targeting mature markets

On the European scale, the luxury industry would actually be a quite positive argument for Rémy Martin as it is one of the growth drivers of the 21st century. Indeed, it is fully compliant with the European Union's objectives in the Lisbon Strategy, aiming at making EU "the most dynamic and competitive knowledge-based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion" by 2010 (Facing the Challenge—The Lisbon Strategy for Growth and Employment, Kok report, November 2004). This strategy has been developed via several initiatives, such as competitiveness clusters, innovation strategy and the Small Business Act, and the luxury industry is an essential part of this process as it takes part of the three Lisbon Strategy's pillars :

1. **Economic pillar** : it deals with the transition to a dynamic and competitive knowledge-based economy. As a creative industry, luxury is an essential part of the knowledge-based society on which European competitiveness is grounded. The recent past has shown the great strength of the European luxury industry in creating jobs and sustaining threatened job pools.
2. **Social pillar** : it deals with the modernization of the European social model through investment in human resources. Above all, the luxury industry relies on men and women—its human capital—as creators, designers, craftsmen, or marketing and sales people. They all receive a quality education within the companies, which give them specific know-how that cannot be replicated.
3. **Environmental pillar** : it deals with the reasonable use of natural resources. Against some trends in consumerism, the luxury industry advances the idea of an object's durability. A luxury product is an "object that can be fixed," it is meant to last. Luxury brands are involved in an

environmental-improvement process: they are aware of progress to be made in caring for the environment, notably regarding the reduction of CO2 emissions (as are all export companies looking to maintain their manufacturing in Europe). For this reason, many luxury players also adopted the United Nations Global Compact program, launched by Kofi Annan in 1999.

5.3.4. Rémy Martin differentiation strategy

All things considered, we could synthesize RM's differentiation strategy as below :

Figure 5.2. : Differentiation strategy of Rémy Martin

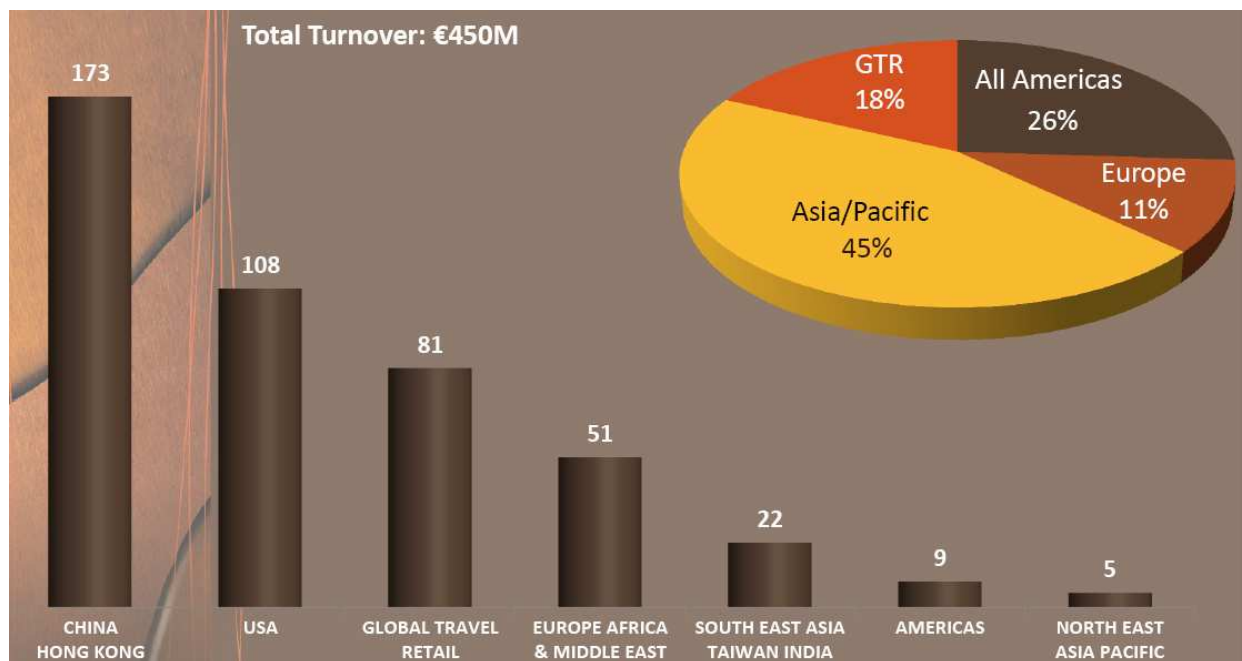


Source : internal

Regarding the different countries Rémy Martin is targeting and the perception those regions have about cognac, we can definitely tell that Asia, one of the most powerful and dynamic regions, is a pertinent

region to work with due to their culture of luxury consumption and their eagerness to learn about traditions and heritage. Below is a graphic that show the turnover realized by Rémy Martin by region and between 2010 and 2011, showing that China is the leading target market realising more than 38 % of the total turnover.

Figure 5.3. : Turnover by region 2010/2011



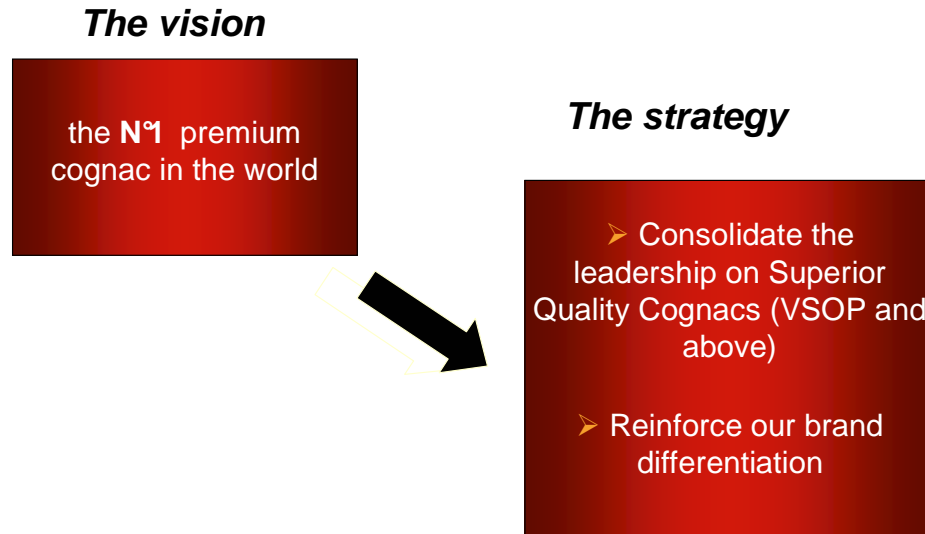
Source : internal

In the competitive market, cognac appears to be fashionable again. Indeed, this category is growing at double digits, with a growing emphasis on the higher grades. However, this category suffers from a lack of differentiation. Hence, the key question to be addressed for Rémy Martin is the following : ‘What is the brand point of differentiation versus Hennessy, Martell and Courvoisier ?’



The strategy of Rémy Martin is in line both with the historical vision of excellence and with the market orientation.

Figure 5.4. : Vision and strategy of Rémy Martin



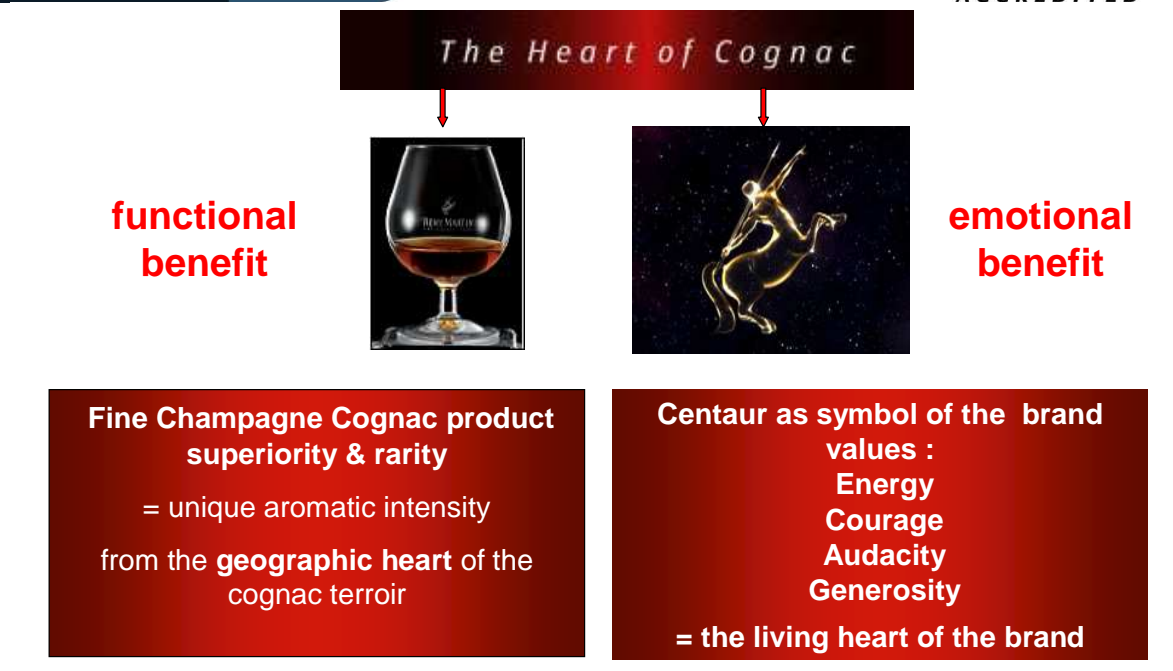
Source : internal

Furthermore, Rémy Martin possesses a differentiated brand idea, the Heart of Cognac, that is strong yet flexible :

- It encapsulates its historical vision and brand essence,
- It helps to explain its premium differentiation,
- It is geographically true and gives a central position in the category, and
- It is simple, flexible and understandable worldwide

This brand idea conveys two core benefits that are the product superiority and the Centaur's spirit as illustrated below.

Figure 5.4. : The two core benefits of Rémy Martin (benefits and symbols)



Source : internal

It is also an idea which works right across the mix as a 360° implementation. Indeed, the ‘Heart of Cognac’ is directly connected to communication tools that will highlight Rémy Martin savoir-faire and products : promotions and packevents, adapted BTL tools and programs by market and channel, a product education strategy via the HOC toolkit, visitors center at the Head company (that is located the “Heart of Cognac”), global product campaigns such as for the XO Excellence or copy strategy developed locally as in China.

Figure 5.6. : Implementation of the HOC strategy



Source : internal

5.4 Rémy Martin : a Heritage brand and a brand with Heritage

Regarding its historical resources, Rémy Martin is particularly seeing a use in it both from internal and external perspectives. In order to understand why a good stewardship of its brand is directly connected to the good management of its historical resources, we will need to explain what the ensuing stakes are.

5.4.1. The benefits of historical resources

Historical resources are for heritage brands such as Rémy Martin a perfect tool of research and heritage animations on national and international scales, and are a strategic way to approach the economical world for the top management. Indeed, the brand and historical resources stewardship deals with improvement and quality processes which application is generally not professional enough from the archivist's point of view. Many high risks are directly concerning the company in regards of

the absence of traceability in contentious cases, the loss of knowledge when there is a change of managers or reorganizations that involve expensive costs ; eventually, the management of dematerialized information constitutes a real challenge for most part of the companies that have not yet put adequate resources into effect.

In the case of Rémy Martin, historical resources are meant to be a source of evidences and knowledge at the disposal of the company, and of Rémy Cointreau Corporation at a larger point of view ; then, it is meant to be the mirror of the trajectory the company has done so far. With a good heritage stewardship, Rémy Martin ensures the internal transfer of its knowledge, its savoir-faire and competences. With the reality of permanent questions induced by the global economic market, the rational organization of historical resources is seen as an asset for luxury companies such as Rémy Martin ; and this would allow the company to highlight its history by illustrating it through its internal communication or its PR strategy. Thus, the historical resources of Rémy Martin would be, from a more general point of view, at the heart of the corporate strategy of Rémy Cointreau in the sense that by securing its history and information, the traceability of its actions, the access to its internal information, or even its knowledge management, it will constitute the heritage and richness of the company.

However, this work represents also a real challenge as those last 15 years, the business environment has changed ; there is now a diversity of products and related documents, and a different interaction between the culture of the company and the professional practices, the need to face new challenges (i.e. profitability objectives, risks management, quality control, new technologies,...). Heritage is no longer only tracing the history of the company's activities but it is also now recognized as a way to get a firmly-rooted company in the present, like a reference and the foundation of an identity ; and in a changing and global economic context, it is nowadays a way to strongly affirm it¹². Thus, in the case of Rémy Martin, the historical resources are illustrating its heritage but also its richness, and the management and exploitation well-understood of its information are also rich asset in the way that they are synonym of efficiency and profitability : as well as its support function, they are also a source of inspiration for Rémy Martin.

5.4.2. Introduction to the Heritage department of Rémy Martin before 2010

¹² Martinez C. (2009), « Les archives, patrimoine et richesse de l'entreprise », La gazette de archives, n°213, 2009, p.12

The Heritage department of Rémy Martin was mainly activated with the birth of its photo library in 1988. At this stage, the purpose of RM photo library was to become a tool of communication with the transfer of ektachrome visuals in order to print brochures, catalogues and posters related to landscapes, vineyards, cognac elaboration process, products and gift packs. With a number of about 4500 visuals in 2006, it was an active tool that needed to adapt itself first to the slide format and then to the digital technology. Indeed, in 2002, visuals were copied and transferred via CD-Rom format, which needed a way to transfer previous pertinent visuals into digital format. From the beginning of its creation, each original visuals from the photo library has been referenced in order to facilitate its search, and with specifications in order to ensure a good classifying at current view and traceability at long term perspective. Below are the specifications required for such a visual to save in the Rémy Martin's photo library and thus heritage :

- Recording number
- Theme
- Date of the shooting
- Name of the photographer
- Original format (24x36 ou 10x12 ou 6x7)
- Key words

In January 2003, requests via paper format were cancelled as Rémy Martin decided to use a new way of exchanging visuals internally in order to make it more attractive : they started to use a intranet/extranet system with a web intelligence network and a selection of images has been done for each categories and sub-categories with a regular update. It was a way for the Heritage and Photo library department to satisfy the visual request in time and ensure a follow-up regarding the use and the destination of those visuals. Moreover, in order to be more reactive, the transfer of pictures from .tif to .eps (Photoshop format) allowed then to send pictures by email in 5minutes.

Thus, with this new database transfer tool, the employees of Rémy Martin were able to consult different visuals related to the theme in question directly on their computer, select the visuals they were interested in and then, fill up an order form that they would send to the manager of the photo library. It was a really interesting tool in the sense that it was allowing to up-to-date the new coming visuals, it

was attractively interesting for any employees within Rémy Martin but also to some staff from the groups, it facilitated the access to the network and the choice of visuals selection as well as communicate on the service offered by the Rémy Martin's photo library

This new 'era' was also a way to make employees more conscious of the conditions of use as well as the law regarding the use of those visuals. Indeed, when photo shootings were realized with a new photographer or a new agency, it was essential to inform the law department in order to establish a contract of confidentiality that would be signed by both parties, the company and the photographer. Then, a copy of it was classified at the Law department and another copy at the Heritage and Photo Library department. It was also requested to be really cautious of the conditions of use and to negotiate the rights and the period of use of future visuals with a special attention as digital format was allowing to produce and exchange more and more visuals as well faster and faster ; also, legally, any employee dealing with those visuals should know that using it without the permission of the author can be punished.

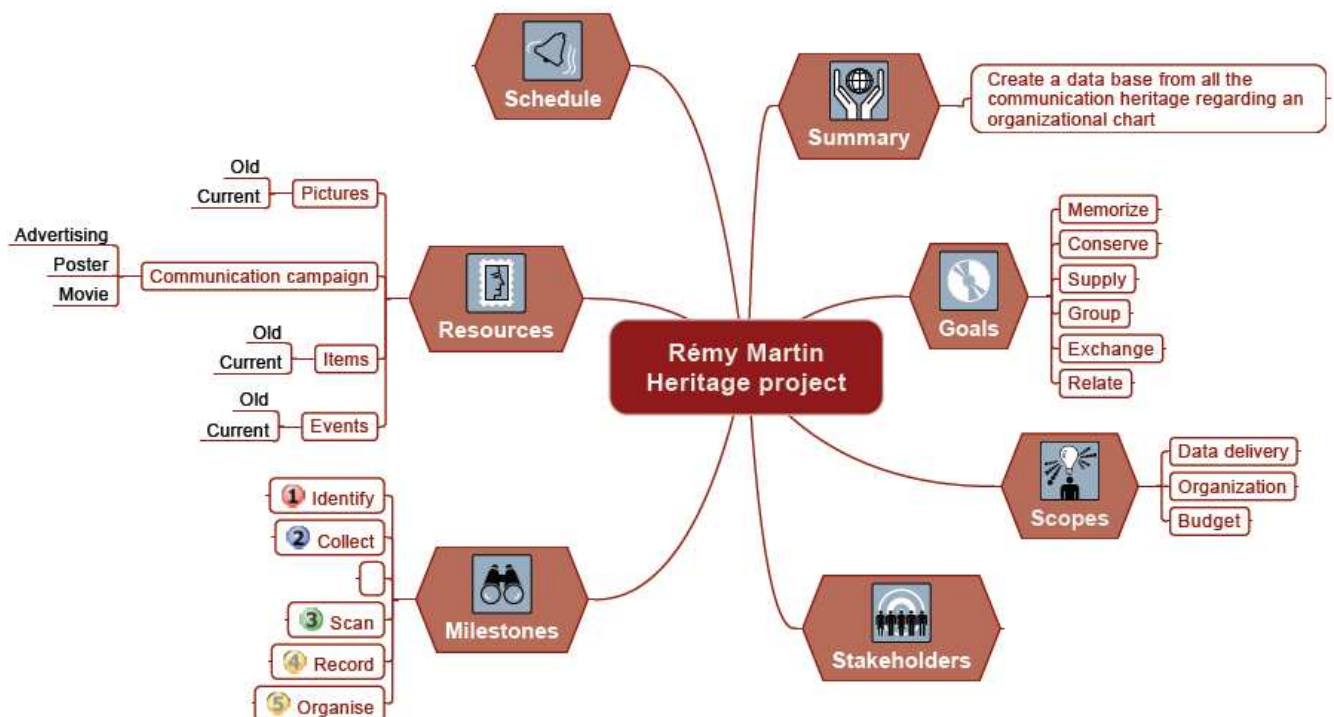
As a result, this new format concerned many Rémy Martin employees, particularly the one from the Marketing, Communication and Duty Free departments that needed to communicate or exchange further about Rémy Martin via the use of those visuals. Nevertheless in order to face this fast coming production of Rémy Martin visuals, enriching the visual heritage of the company, new processes were tried to be enforced but the regular change of management staff was making it more difficult in order to organize the past visuals and gather the new coming. However, a strong communication was made about the benefit of well-organized photo library that was a way to preserve the heritage of Rémy Martin and thus the memory of the company. Also, the new challenge for the Heritage and Photo Library department was to direct efficiently this tool at the service and disposal of people at internal scale, and to the destination of external partners.

5.4.3. Rémy Martin's Heritage and Media Library project

[For your information, the following project information and definition of the missions have not been extended in their entire complexity due to confidentiality purposes.]

I was engaged to work on a new project of coordinating the visual database of Rémy Martin (old and current) as well as participating to general project of reactivate the whole Heritage department in order to develop new tools at the disposal of the different internal departments within the company, such as the Marketing, Communication and PR, as well as the Law department.

Figure 5.7. : Mindmap Heritage of Rémy Martin



Source : internal

As a project that was deeply taking part of the Heritage strategy of the company, it was focusing in the idea of connecting the past and current heritage of Rémy Martin through the creation of an international digital platform and centrally managed in Cognac. Thus, it was involving the Heritage of Rémy Martin but also its Photo Library, the current events and advertising. The main objective was to preserve RM historical resources but also to animate it so it can be taking part of current strategies related to the brand image and notoriety notably ; it was also the opportunity to make employees as well as conscious to anticipate the fact that they are building every day the heritage of the company and thus the 'brand of tomorrow'. Below is an overview of the 4 main orientations to this project :

1. *Heritage* : to list and digitalize the historical resources in order for them to be alive and become source of inspiration. Thus, a poster would be listed in the data base and illustrated by a visual with a description and recommendations of possible use.
2. *Photos* : similar methodology as below regarding the current photo library used at that time, but with the integration of a system that would allow to get all the picture information and an alarm in case of the renew of rights to anticipate.
3. *Process implementation* : to plan a similar process regarding all event abroad. The objective is to follow in live what is happening and developed everywhere, as well as optimize the transfer of best-practices.
4. *Advertising and PR* : similar methodology and best practices exchange regarding films, TV spots and visuals related to RM events or features.

Although this project had not been input to the 2009/2010 fiscal year, there was however a clear need identified. In order to plan it for the 2010/2011 project, two possibilities were considered : either the project had to realized via a global package, either step by step within a four-steps planning (see Appendix 1). Thus, December being the month of anticipation for forthcoming corporate budgets, the project was due to be projected with solutions on the December 15, 2010.

This mission was firstly due to take 6 months to realize but as the Heritage stewardship is a process that needs to use a long term perspective, it has been naturally extended for another 6 months. I was actually assisting another colleague of mine whose mission was the management of the historical resources and the deployment of the Heritage project in general in order to get a multimedia structure ‘at the Heart of Rémy Martin’, whereas I was mainly in charge of the management of the Photo Library with the task to suggest process implementations and a new tool for iconographic database sharing within the company. The process of it took two steps before becoming effective :

Step 1 : From mid-August to beginning October, 2010

- To become immersed with the company’s culture in order to better initiate the Photo Library mission
- Training by the previous responsible of the Photo Library

- Integration of the documents information related to RM products that have been compiled by my colleague
- Immersion and conditioning in order to develop the new RM Photo Library at the Head Office in Cognac
- Mid-September : active and 100% managerial autonomy on the Photo Library task, efficiency regarding the various requests in terms of visuals and movies, as well as the requests regarding specific information and literatures
- Classifying of new coming corporate visuals and movies (launch, events, vineyards...)
- Introduction to a related heritage project : the References Gallery of the House Rémy Martin

Step 2 : From October to December, 2010

- Training to enrich and improve the visuals database (through Access)
- Assistance to the making of the RM Visits in Cognac and introduction to the staff
- Progress of the Heritage project : collect of RM visuals in Cognac and Paris offices
- General awareness to define specifications and processes to systematically follow for any photo shooting, intellectual properties and rights transfer (addressed to the Law, Marketing and Communication departments notably)
- Future project (January 2011 suggestion) in order to integrate a process of 'clean-up and storing' of iconographic data and information (ex: each semesters)
- Execution and understanding of the interest and use of heritage resources for the subsidiaries abroad (link between function, utility and enforcement for corporate marketing strategies)

In order to accelerate the process of valorization of its Heritage, the company has engaged an agency to work on the selection and digitalization step of the project. There mission consisted in scan high resolution of approximately 500 documents with a related information file in order to illustrate the 'exceptional heritage of RM' and to get a time and thematic classification of it. All what was

representing the heritage had also been gathered in one and unique room that is now called the Heritage storage space. The 90 000 items composing the heritage of RM have been categorized into two fields : from one hand, the ‘References’ (15 000 items) that are actually the Heart of RM’s images heritage, and from the other hand the ‘Reserves’ (75 000 items). The selection made to get the ‘References’ is pertinent and important as it is meant to be exploitable and lively through marketing research and/or the communication strategy.

As a matter of fact, the first step of this Heritage reorganization project helped to have :

- an efficient and operational database
- a protected and back-up heritage
- the gathering of this latter in one location
- the identification of its treasures and wealth
- a facilitated access to the historical resources

However, if at this stage the fundamentals have been initiated, it is still necessary to pursue this efficient work in order to settle and build up a genuine heritage tool in order to satisfy all the current and future requests of RM stakeholders. In order to have an exploitable heritage, it will be crucial to identify and scan further ‘fundamentals’ to pass from 500 to 1 500 references ; this will be a main benefit to the company in the sense that it would be useful for its internal and external websites, for the PR and other departments in order to edit new books or other corporate brand presenter tools. All things considered, the application of this heritage project is helping to highlight the rich and incredible images bank and other brand elements of Rémy Martin that would have been either partially used or even minimized, and thus it is eventually contributing to the valorization of the House Rémy Martin as well as enforcing its dynamic and strong brand identity.

6 CHAPTER : CONCLUSION

Through this sixth chapter, we will try to give a conclusion, connecting the literature review to the practical part of Rémy Martin's case study. We will indicate the main findings obtained from the case study ; then, the limitations of related case will be exposed ; and eventually, will give recommendations for related gaps.

6.1 Main findings obtained from the case study of Rémy Martin

The purpose of this thesis was to focus on how firms draw on historical references in corporate marketing through the illustration of the Rémy Martin's case study. We tried to analyse the logic behind such efforts from a corporate identity perspective and to propose potential risks as well as benefits of doing so. The research aimed to inspire the understanding of how references to history are used in marketing and the outcome of such use.

In below parts, the thesis mainly draws on literature relating to corporate marketing and the use of history in organizations with heritage such as Rémy Martin. By combining these theories and pointing at the empirical examples, this research clarifies why references to history can be important manifestations of corporate identity. It also came up with propositions concerning what consequences the reference to history in corporate marketing can have for the marketing strategies of firms and business development.

This study outlines a connection among identity, organizational identity and image through corporate communications. It suggests that among the range of corporate characteristics, historical references can be particularly valuable for corporate communications thanks to the reliability age can provide at the opposite of liabilities of newness. Furthermore, elaborations suggest that the planned use of historical references has both advantages and risks in terms of business development.

Eventually, although considering the notion of history as an inevitable and distinctive firm feature may help to see it as an important key element in corporate marketing, the risks potential is quite discouraging. This study tried to give some remedy to this gap via the example of Rémy Martin which

elaborates the internal and external rationales for applying historical references and shows how these can be explained in connections between corporate identity and history.

The first mission of Rémy Martin within its heritage project was to collect and gather all archives and current documents of the brand to organized the heritage of the House Rémy Martin, protect it and thus, increase its heritage resources. With an effective and efficient iconographic database that is composed of more than 500 referenced documents, many promotional and advertising animations can be realized within RM corporate strategy, and then highlights its brand image. By giving another dimension to RM's heritage and making its heritage resources and data accessible, it helped to ensure a permanent organization of the Heritage of Rémy Martin. Thus, the first step of this project was a way to reorganize the Heritage department as an essential asset of the corporate strategy of Rémy Martin and Rémy Cointreau, and to contribute to the valorization of Rémy Martin's Heritage. A presentation of the final report related to my missions within the company and its heritage deployment project during the year is attached to this thesis (see Appendix 2).

6.2 Limitations brand heritage and digitalization

The first stage of the whole Heritage project of Rémy Martin is promising efficient results and benefits for the company and its brand image. Indeed, this project will provide a full support to promotional and advertising strategies such as on the Internet as it is a communication tool evolving with the increase of digitalism. Nevertheless, if this communication tool is getting more and more essential for large companies to express themselves and communicate about their brand image, to transfer historical information that sales assistants are not transmitting to customers abroad when they do not specifically know the brand heritage of related company, or even to highlight savoir-faire and craftsmanship competencies to justify their prices, it is of relevant attention for luxury brands such as Rémy Martin to understand the technology factors involving such image exposures.

In order to manage this flow of information related to digitalism, we recently saw a new trend of brand stewardship and use of heritage through the development of knowledge management systems that would make the historical resources alive and valorise it daily. It is predicted to be an essential tool for luxury heritage brands such as RM that are constantly drawing on their history in order to better face

contemporary environment. Indeed, the total control of the brand and identity image and helping their development without denying its original values is a compulsory strategy step that luxury brands need to follow. It is facing the market and shareholders pressure that push the company to increase creation and innovation capacity, as well as the commercialization of new products that are out of the brand historic savoir-faire ; also, this phenomena is reinforced by the periodic change of celebrity designers that change the habits and original value pattern. The current issues and motivations that push company such as Rémy Martin to valorise their brand heritage are partly related to this. The development of knowledge management tools gives a potential global access to it but with the purpose of protecting and saving historical resources without physically manipulating it, dealing with its different formats and features (text documents, visuals, films), and thus offer adapted possibilities for companies to deal with the digital management of their heritage.

There is a strong expectation and need coming from companies to and their communication networks related to their heritage. Indeed, there are different reasons to explain the new interest of digital historical resources ; in the case of Rémy Martin, it would be a way to prepare future retrospective exhibitions or books, to answer external requests that are asking to use a digital tool in order to send voluminous archives, or eventually to structure the information that are at the disposal of a scattered community. However, this attempt of scanning the heritage and historical resources is facing a “threshold effect” issue that is discouraging when it deals with the digitization of existing archives as it will be related to the deployment of considerable financial and human resources in order to index (that is digitalize and describe with specific expert terms) all the constitutive entities of the heritage ; that is mainly corresponding to hundreds of thousands of references as it is proportional to the brand notoriety, the extent in terms of variety of product lines, and the oldness of its related brands. Thus, the task of heritage stewardship and valorisation can only be efficient if it is consider with a permanent and daily approach as Rémy Martin will periodically have to be under this threshold effect with the goal of managing its heritage with a compulsive and intermittent way.

All things considered, the main limit in this process of heritage stewardship via the use of a digital data system will deal with the ability of Rémy Martin, like many other luxury companies (see Appendix 3. interview of the Heritage manager of Veuve Clicquot Ponsardin), to keep on following its initiatives that are firstly focused on the genuine and particular relation to customers and the valorisation of its heritage and distinctive savoir-faire. It would be essential for the company to eventually use these

knowledge technologies with a long term perspective rather than adopt it for editorial or consulting purposes. Furthermore, in order for Rémy Martin to have an efficient stewardship of its brand image and heritage, it will need to focus on a qualified human-resource-oriented investment that will ensure the increase of its success via the use of adequate information and knowledge technologies to protect its heritage.

6.3 Recommendations

While working on organizing a digital implementation process of its heritage, Rémy Martin is also working on the issue of making the most out of its brand heritage through content and events. Indeed, the presence of a digital media across multiple platforms would help the company to publish more and more non-commercial contents. In order to be successful in its content campaigns, Rémy Martin should first carefully examine and select the elements that are part of its brand's heritage to design its strategy.

The first step would be to clearly identify which elements are powerful enough to create a rich and dense universe that best reflects the brand identity. As mentioned in below parts, brands are a source of content and knowledge, but they can not choose anything randomly from it to build their story. In the case of RM, once they would have selected the relevant content in their corpus, they will be able to design a content strategy accordingly. Only after designing this strategy the content operations should be executed.

Consumers usually perceive content campaigns as a cutting-edge means of communication. If Rémy Martin succeeds in supporting these operations, it will hence be perceived as modern and innovative while making the most of new communication channels and digital media. Even though this content is not immediately sales-related, it will be extremely efficient in building the brand's image, engaging the audience and helping the brand to radiate world widely. Moreover, nowadays many brands have already launched initiatives to release content using all of the technologies available to distribute their content across the digital field (web, social media, mobile...). To be truly engaging, these initiatives should be in a consistent content strategy as choosing the right content is not only about telling a story but more about building a story.

Consumers are also keen on learning about the history of luxury brands and getting a ‘backstage access’ to the brand. Indeed, from a consumer’s perspective, there is a strong gratification in finding out about the brand’s history because it allows understanding where it started and how it got to where it is now ; they are really keen on founding out what is behind the product and the role that the luxury house has played in history. For a French company with a heritage like Rémy Martin, giving the consumers an access to the history of the house RM can also give them the feeling that the company is revealing them a secret, and thus will convey the feeling that they are taking part of an exclusive community: the consumers would then feel initiated into RM’s universe. Also, interviewing designers and releasing documentaries or books on the House Rémy Martin gives the public an access to the symbolic meaning of the brand and to its values, therefore strengthening its role in the society. Regarding the marketing and communication departments of RM, thanks to the extremely powerful content’s source of the company, they would be able to see beyond the brand’s core identity and make the most of the events organized by the brand instead of being sponsored.

Events are also a great way to update the brand’s legacy and ensure its longevity. Actually, not only the online distribution across platforms would be a way to increase an event’s total audience, but it is also a way to extend the event and make it last longer in people’s memory. In the case of Rémy Martin, if the company decides to organize an international event show related to an anniversary for instance, the broadcasting of it and online distribution along with released interviews and pictures will help to make RM’s website lively and consequently will contribute to highlight and live-up its heritage. Also, the promotion during the event would allow the people to learn more about the brand, its products and its know-how. Thus, using this kind of events to create content would be a great way for RM to revive and nurture its brand’s legacy as content around events is extremely stimulating and engaging to the audience. It is a powerful tool which purpose is to convey the energy, poetry and magic of the brand, giving the feeling that something ‘hip’ is happening in the brand’s life. Eventually, it would be also a way for Rémy Martin to federate a community and have the participants share a strong experience with and around the brand. The participants would then talk about this strong experience and then will spread the magic and spirit of the brand among friends by becoming brand ambassadors.

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- Orangina Museum
- Cointreau Museum
- Perrier Museum
- Maison Baccarat (designer Philippe Stark)
- Lacoste (designer Christophe Pillet)
- Rémy Martin
- Bollinger
- LVMH (including Krug et VCP)
- Charles et Piper Heidsieck
- Lanvin
- Delisle
- Christofle
- Mellerio dits Meller
- Guerlain
- Maison Vache qui rit à Lons-le-Saunier
- Musée Amora
- Musée Haribo
- Visit entreprise Mercier
- Comité Colbert
- CELSA – Marketing de luxe
- Abbaye de la Bénédictine à Fécamp (traditional activities museum)
- Entreprise Denoix à Brive (traditional activities museum)
- Société Fragonard (perfume distribution channel museum)
- Fondation Bernadaud (Museum at the heart of the company)
- Air France (virtual museum *airfrancelasaga.com*)
- L'Office de coopération et d'information muséologique, (archivist publications)
- Programme Feder européen pour subventions et stratégies de défiscalisation

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- Thierry Wellhoff, directeur de l'agence de communication Wellcom
- Anne Rampillon, responsable communication de la Mie Caline (Museum manager)
- Jean-Michel Collard, directeur du musée de l'aventure Peugeot à Sochaux
- Felix Torres, Maison d'édition, ouvrages sur l'histoire et à la mémoire des entreprises
- Marc Désarménien, acteur dans mise en scène de la moutarderie Fallot (Beaune)
- Pascale Meysonnat-Courtois, muséologue spécialisé en patrimoine d'entreprise

Appendix 1

- PROJET PATRIMOINE ET MEDIATHEQUE REMY MARTIN -

PHASE I Mobilisation Acteurs du projet	PHASE II Inventaire Complet Historique et contemporain	PHASE III Rassemblement Stockage et Base de données	PHASE VI Exploitation
<p>1° Sensibilisation globale au projet pr associer des ressources (humaines et investissements).</p> <p>2° Sensibilisation des patrons de marchés et de marques pour obtenir en aval une Mobilisation sérieuse sur le "patrimoine" contemporain.</p> <p>3° Lancement de la "capture des données auprès des personnes désignées par les N+ 1</p> <p>4° Définition de formats et process :</p> <ul style="list-style-type: none"> - juridiques - artistiques pour tous les shootings futurs et - transfert de copies <p>pour tous les shootings et films futurs.</p> <p>5° Mise en place d'un process de "nettoyage, archivage" des données dans les bureaux.</p>	<p>1° Doc Papiers</p> <ul style="list-style-type: none"> - Livres compte - Livres coupe - Correspondance livreurs et clients - Commandes Expéditions - Diplomes, etc.. - Affiches publicitaires - Plans de bâtiments - Catalogue archives départementales - Consultation Archives Presse locale avec mention de la marque. - Dossiers de presse et presse <p>2° Photos et films :</p> <ul style="list-style-type: none"> - anciens et contemporains <p>3° Objets divers et flacons rares.</p> <p>4° Récolter Témoignages :</p> <p>Témoins vivants d'un passé proche</p> <p>Maîtres de chais etc...</p> <p>5° Si patrimoine mobiliser / objets de valeur : inventaire par les Experts en assurance ?</p>	<p>1° Phase de reproduction / numérisation / Rentrée des données informatiques</p> <p>A conduire ds le même temps que</p> <p>1° BIS</p> <p>l'organisation PHYSIQUE :</p> <p>Lieu à 18° et 50 hygro pr les docs + Boites spéciales.</p> <p>Lieu à 16° pr les photos.</p> <p>Rayonnages métalliques, intervention fumée prioritaire etc...</p> <p>Boites sans acide.</p> <p>Idealement : Lieu au CŒUR de l'entreprise pr devenir ds la durée "médiathèque et patrimoine".</p>	<p>→ Valorisation, mise à disposition en communication, relations publiques" et marketing.</p> <p>→ Valorisation pour des visites thématique ou nourrir les visites d'anecdotes : ex, montrer à un hôte japonais la première expédition ou le premier contrat avec Son pays.</p> <p>→ Possibles conduites de travaux de thèse de doctorat ou ouvrage plus "grand public" sur des thématiques particulières.</p>

- FINAL REPORT OF THE MEDIA LIBRARY MISSION -





Pourquoi une Médiathèque?



- Un outil au service du réseau interne et à destination de l'extérieur (réseaux, agences).
- Gérer, traiter différents types de documents (images, vidéos).
- Diffuser des contenus fiables.
- Permettre la réutilisation des documents (hors contexte initial).
- Simplifier les accès à l'information.
- Participer à la construction de l'image de l'entreprise.
- Accélérer le partage de best practices



Projet Médiathèque service Patrimoine
P. ROUSSEAU

The Heart of Cognac 5



Pourquoi un process rigoureux?



- Accélérer la diffusion fiable des documents.
- Mettre à disposition de chacun un patrimoine commun prêt à être utilisé et valorisé.
- Faciliter la mise à jour régulière.
- Anticiper le renouvellement des droits.



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Les avantages de Phraseanet



- Mise à jour dès l'arrivée de nouvelles photos et vidéos.
- Convivialité pour l'utilisateur.
- Facilité d'accès pour le réseau.
- Choisir en « direct » les images avec des droits d'accès modulables.



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Process



Lors de chaque prise de vue, il est indispensable de demander les éléments suivants :

2 sorties numériques (CD haute définition)
=> extension en .tif (300 dpi voire 400 dpi) pour impression.

2 sorties numériques (CD en basse définition)
=> extension en .jpeg



! : Hors ces conditions, le coût d'un scan ou la copie du shooting est très élevé.
A bien cadrer dès le début dans le devis avec votre interlocuteur qui devra remplir les métadonnées.



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MAISON
RÉMY MARTIN
DEPUIS 1724

LES METADONNEES

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Les Métadonnées



Exiger dès le contrat
qu'elles soient renseignées

Titre court du document
(25 caractères max.)

Nom du photographe
et de l'agence

Ouvre protégé
par copyright
oui
Domaine public

REMY MARTIN
The Heart of Cognac

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MAISON
RÉMY MARTIN
DEPUIS 1724

Cahier des charges des prises de vues



- Avant toute prise de vue, le brief le plus précis doit être donné par le demandeur.
- S'assurer d'avoir bien rassemblé les éléments garantissant le succès de la prise de vue.
- Pour nous appartenir les images doivent être impérativement libres de droit.



Document
read Word 97 - 2

REMY MARTIN
The Heart of Cognac

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MAISON
RÉMY MARTIN
DEPUIS 1724

Avant un reportage Photographique



- Objectifs et Briefs, Définitions de toute Métadonnée future.
- Anticipation des besoins futurs.
ex: lors d'un shooting vertical, anticiper la réalisation horizontale et valider l'ensemble des contrats à anticiper (Droit à l'image, Contrat de création et cession de droits, accords de confidentialité).
- Informer le département juridique d'une prise de vue à venir.
- Fournir les coordonnées complètes du photographe/ vidéaste/agence pour réaliser les contrats nécessaires.



REMY MARTIN
The Heart of Cognac

Projet MédiaBlogs service Patrimoine
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Après un reportage Photographique



• Envoyer un original au service Patrimoine à Cognac.

• N.B. : Vous assurez que ce process est parfaitement mis en place pour l'ensemble des marchés avec lesquels vous travaillez.

→ Objectif : Disposer en central de tout ce qui est produit sur nos marques.



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MAISON
RÉMY MARTIN
DEPUIS 1724

PARTIE JURIDIQUE



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Partie Juridique



- En pièce jointe quelques exemples type de doc.
- « Les documents transmis ci-joint ne sont que des exemples type et DEVRONT ETRE ADAPTES à chaque situation (en particulier cession de droits), ce qui implique qu'à chaque fois, les utilisateurs doivent passer par moi. »
- « En aucun cas transmettre de tels documents ne signifie que les utilisateurs peuvent signer ces documents en l'état en s'abstenant de vérifier avec le juridique si ce qui est écrit correspond à nos besoins. »

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Remy Martin
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Modèles de Contrats



- Faire signer systématiquement un contrat entre la Société E. Rémy Martin and C^o et le photographe (cf annexes).
(original pour service Juridique, copie Photothèque)
- Négocier les droits d'utilisation des visuels :
 - Nature des droits cédés
 - Type d'exploitation
 - Durée
 - Zone géographique



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Conditions d'utilisation



- La demande de travaux (prises de vue et films) sera complétée par un texte relatif aux conditions d'utilisations futures du résultat.
- Il faut être très vigilant quant aux conditions d'utilisation. (cf annexes)
- Il est rappelé que pour toute utilisation des images, la mention légale © E. Remy Martin and C^o est obligatoire et éventuellement la mention des droits d'auteurs.



Devant la loi, sont passibles de sanctions :
Toute utilisation d'une photographie sans l'autorisation de l'auteur.



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Conditions spécifiques concernant des grands photographes



- Pour information, nous avons aussi des publi-reportages réalisés par des grands photographes tels que :Robert Doisneau, Yann Arthus Bertrand, Erica Lansner, Marc Riboud, Carlos Freire...
- Nous avons négocié les droits d'exploitation.
- Pour chaque photographe un contrat dûment signé est classé au service juridique ainsi qu'une copie dans nos dossiers respectifs.



NB: Concernant le photographe Robert Doisneau, les images ne peuvent être utilisées qu'avec l'accord préalable de Madame Dominique Hériard Dubreuil.



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Appendix 3.

- INTERVIEW OF KRUG AND VCP HERITAGE MANAGER, FABIENNE CHUTEAU (26.01.2011) –

Quelques acteurs dans le domaine :

- Felix Torres, Maison d'édition, ouvrages sur l'histoire et à la mémoire des entreprises
- CELSA – Marketing de luxe

Histoire :

Colbert au service du roi Louis XIV – métier et entreprise du luxe, artisanat français

→ Comité Colbert : promotion de l'industrie française du luxe en France et à l'étranger

Thématique actuelle :

Entreprise de luxe doit se référer à son histoire, et pour se faire, consacre un budget à la valorisation de son patrimoine. Parallèlement, les entreprises dites 'industrielles' (ex. : biscuit, bonbon) telles que Coca Cola font également référence à leur histoire, mais sont moins légitimes (stratégie 'gadget')

Aussi, mouvement actuel de rattachement au Patrimoine, même si ne sont pas entreprise de luxe, à l'étranger

Ex. : Australie, industrie 'beurre de cacahuète' travail avec des archivistes sur mise en place d'opérations marketing (anciennes étiquettes, histoire sur le produit, ...)

→ Codes, valeur, pérennité permettent de vendre un produit plus cher, notamment pour entreprises de luxe

- VCP -

Début XXème siècle, produits qui ont évolué mais toujours avec la qualité premium

Les archives font l'objet d'une sensibilité permanente de tous les dirigeants afin de les protéger. Ce sont aujourd'hui les héritiers de ces fonds.

Fabienne Chuteau Moreau :

Formation Histoire

Fondatrice de l'entreprise « archimiste »

Missions pour des entreprises industrielles, champenoises, administration et insitutions car besoins existants (ex. : pour célébration d'anniversaire, des brochures,...)

Missions pour VCP sur l'inventaire des archives pour projet à long terme de valorisation du Patrimoine

En quoi consiste le travail du service Patrimoine/Heritage au sein de l'entreprise ?

*Sur des missions marketing, il y a créations de documents, de supports et d'outils ayant pour objectif final la **transmission** de ces derniers.*

Conservation du Patrimoine = mineur même si obligatoire

Archives ≠ Ressources historiques qui elles permettent la transmission d'information

Profil du chargé des ressources historiques : répondre aux différentes demandes et intégrer toutes les attentes des services de l'entreprise, à savoir :

- 1. communication,*
- 2. marketing,*
- 3. ressources humaines (pour communication interne),*
- 4. juridique,*
- 5. commercial (pour les marchés et les filiales),*
- 6. 'communication vin' (pour la communication des œnologues), et enfin*
- 7. la Direction qui souhaite intégrer l'histoire à son discours*

Le service des Ressources Humaines a donc pour objectif d'être force de proposition par rapport aux différents produits (ex. : brichures, informations produits par rapport à différents marchés)

*➔ En quoi consistent les missions Patrimoine ? Les missions Patrimoine participe au développement de l'entreprise. Pour la Direction, le Patrimoine doit alors être **rentable** car il y a bien création de valeurs face à des concurrents moins chers. Le Patrimoine est également source d'inspiration pour des projets marketing.*

Le Département 'Heritage House' retient tout ce qui a trait à l'héritage et au patrimoine :

- bouteilles,

- famille
- codes (graphiques et couleur notamment) liés à l'entreprise → lié au luxe car une maison justifie des codes arrêtés
- étiquettes
- petits objets

L'histoire, qui connote l'authenticité, de légitimité et d'assurance (preuve qualité), permet alors aux créatifs d'être plus à l'aise pour innover, se « débrider » (ex. : boîte en plastique vintage 50's). On allie alors tradition et modernité car inspiration avec histoire pour permettre des créations design avant-gardiste.

Ex. : millésime exceptionnelle = 1^{er} millésime 1810 « cave privée » avec ruban jaune

- KRUG -

Nouvelle direction récemment

Travail sur les origines avec aide à la Direction pour établir une stratégie communication et de positionnement → le travail et les missions Patrimoine de l'entreprise en deviennent d'autant plus important !

Quelle est la place de l'histoire dans l'entreprise ?

- *A quoi sert l'histoire ?*

Comment l'insérer dans une organisation qui cherche à faire des profits (lorsque l'histoire est bien intégrée dans l'entreprise, lorsque l'on sait la place que l'histoire a dans l'entreprise) ?

- *Motivation pour le produit (champagne ici) car produit culturel (« c'est plus qu'un vin ! ») car embrasse plus largement toute une société. De plus, le Champagne est une thématique très large et très variée.*
- *Coordination, interface avec les services, même pour les RH (ex. : droit social de l'entreprise, l'histoire de leur service). Il y a bien une demande car les ressources historiques activent au sein de l'organisation de gros budget !*
- *Mécénat culturel*

- GESTION DE LA BASE PHOTOTHEQUE -

Photothèque institutionnelle :

- histoire
- contemporanéité
- maison (service communication)
- terroir
- produit (service marketing)

Les événements ne sont gérés aujourd'hui que par les RP et les Relations Presse, mais il ya une démarche actuelle d'intégration car délicat au niveau juridique et organisationnel (difficultés au niveau des recolléments et de la gestion).

Aujourd'hui, la photothèque VCP est répartie en 3 bases :

1. *une base externe*
2. *une base ressources historiques* → tout ce qui relève de l'anciens ; accord préalable du service des ressources historiques indispensable pour toute utilisation
3. *une base documents 'droits échus'* → photothèque offline

Ce fonctionnement a été mis en place en 2005, et a été entrepris à partir d'une expertise pour une autre entreprise du groupe. L'expertise s'est effectuée avec **consultation du service informatique interne**, et en travaillant avec le logiciel PHRASEANET.

Avantages du logiciel de gestion base de données images Phraseanet:

- ludique,
- pratique,
- facile d'exploitation
- pas besoin d'expertise en technologies numériques pour l'exploiter et l'utiliser
- transmissible rapidement

Auparavant (avant 2005), la Photothèque était gérée par une seule personne. L'équipe s'est alors élargie à 3 personnes pour une gestion de 1200 documents. Il y eu un véritable travail de recherche sur les droits avant d'effectuer le travail de numérisation de tous les visuels renseignés en tant que documents historiques. Il y eut également un travail de récolement afin de pouvoir mieux renseigner chaque document numérisé :

- 1 visuel = 1 codification avec renseignements relatifs et document mentionnant le texte visuel, puis
- recherche sur les droits avant mis en ligne

Appendix 4.

- INTERVIEW OF BNIC ARCHIVIST AND PHOTO LIBRARY MANAGER, BRIGITTE LUCAS (24.02.2011) -

- A l'origine, travail avec les diapositives, mais avec l'ère du numérique, des besoins se sont créés et se sont multipliés → gestion devenue très vite lourde.
- Passage de l'argentique au numérique avec numérisation du fonds iconographie.
- Outil image très important aujourd'hui mais implique de ne pas négliger le reste, à savoir la conservation des autres ressources historiques, l'aspect juridique lors de toute nouvelle création de documents iconographie, et tous les autres services auxquels doit répondre le service documentation.
- Il est nécessaire d'avoir établie au préalable un contrat type qui servira à toute nouvelle création, même si celui ci se verra souvent renégocié avec l'agence avant contractualisation.
- La valeur de l'information est très importante. 1 photo doit correspondre à :
 - **1 légende**,
 - **1 information**, et donc
 - **1 validation** / certification
- Formation existantes dans le domaine de la documentation :
 - *Institut National des Techniques de la Documentation*, spécialités 'Ressources documentaires et base données en entreprises' (www.intd.com)
 - Stages professionnels de formation en gestion de l'information
 - Associations de professionnels de l'information et de la documentation telles que *ADBS* (<http://www.adbs.fr/>)
 - Ecoles d'archivistes
 - IUT information et communication
- **Logiciel ORPHEA** (outil utilisé pour la gestion de la photothèque du BNIC) :

- Etablissement d'un cahier des charges pour choix outil/logiciel
- Validation à la fois par le département communication et le département informatique
- Quels champs pour fiche photos ?
- Quels droits et conditions d'utilisation ?
- Gestion du back office par le service Patrimoine/Documentation/Photothèque

➔ **Avantages logiciel Orphea :**

1. pdf
2. visuel
3. vidéo

➔ L'essai de plusieurs versions test logiciels et une formation à l'utilisation de cet outil pour gestion Photothèque sont essentiels !

➔ Quelles sont les variables à prendre en compte ?

- **Panel des existants** (quel fonds ?)
- **Coût du logiciel** ? (budget)
- **SAV** (maintenance)
- **Modulable** ?
- **Arborescence thématique** (quels mots clés ?)
- **Conditions juridiques**