

- Master Thesis -

MSc in International Marketing & Brand Management

Organic Brand Heritage through Multiple Authors

How does brand heritage unfold over time and through multiple authors?

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Abstract

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| Authors: | Lena Fäustle, Kate Lottridge |
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| Keywords: | <i>Brand Heritage, History, Myth, Narrative Analysis, Sports</i> |
| Thesis purpose: | This thesis studies the subject of brand heritage by examining the two sports umbrellas of equestrianism and martial arts, seeking to build an introductory understanding of whether brand heritage can organically develop through unencumbered and independent handling and rewriting of history and myth, and through the voices of multiple authors. |
| Methodology: | An analysis of documents produced throughout various decades provides insight into how ideas of collective history and collective identity are reshaped and altered over time and through multiple authors. We study documents qualitatively and attempt to understand what is being communicated in the documents through language interpretation, including both verbatim reports as well as reading between the lines. |
| Theoretical perspective: | The three theories this thesis is based upon are history, myth and narrative analysis. |
| Empirical data: | Cross-sectional, in-depth document study |
| Conclusion: | This thesis problematizes the notion of brand management as it relates to brand heritage and brand heritage building. A revised interpretation of brand management with less focus on control is suggested. |

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CHAPTER I

INTRODUCTION

1 Introduction

In the introduction chapter, we will first present a prologue to our general topic followed by a literature review of the concept of brand heritage and the usage of history in branding, as well as the role of managers in branding. This will provide a comprehensive understanding of the conversations in which this thesis attempts to participate as outlined in related literature. Both conversations will occupy a central role throughout this thesis. Afterwards, we will introduce our thesis focus, containing the research question.

1.1 Prologue

The subject of history has been a recent preoccupation within marketing literature. Gaining a deeper understanding of the concept of history can be a valuable tool for its applicability to marketing and branding and the broader aspects of business development. History is both meaningful and consequential when applied to the context of brands and brand development; it has been used as a tool in branding to offer a value proposition to consumers, emphasising a commitment to brand values over an extended period of time and celebrating particular aspects of the past (Urde et al., 2007). The notion of heritage and its development has frequently appeared in branding literature under a presumption of the centrality of management. Current conversations in this field hold a conviction that there exists value in controlling both brands and their heritage. Here, this thesis discovers an interesting conversation to closely examine.

Given the importance and relevance of brand heritage in the marketing and branding field, this thesis is about developing a further understanding of the nature of brand heritage. Our approach to the concept of history is that it is not static or predefined; rather history is constantly being rewritten and is grounded in a temporal dimension. History is different from the past; it is a present day perspective on the events of the past that are deemed important through the eyes of the documenter. Yet there is not only one documenter or historian—history is written and rewritten by multiple authors from various disciplines and backgrounds. History is in a perpetual state of evolution and can be interpreted in different ways by different individuals, thus everyone has access to history and is able to influence it in some way. The construction of history and heritage is the major theme examined throughout this thesis.

Secondary theoretical terms used within this thesis are myth and narrative analysis. A myth is connected to history in that both concepts are rooted in the past. A myth is a social construct used to provide order and ritual, and to reinforce order and ritual, within a society. Myth occupies an essential role in society as it adds coherency through the spread of a concrete universal. A myth cannot be judged by its truths or its falsehoods, for the value of a myth lies in its widely understood fascination amongst the members of the society in which it was created. Narrative

analysis, also known as comprehending storytelling, is another subject touched upon in this thesis. Narrative analysis is a constructive format that seeks to describe the sequential order of ideas that social actors tell through narratives. By studying narratives, researchers can gain insight into the storyteller's mind, which can then help to understand a more complex, fundamental, or concealed story within a particular context.

When we study history we study documents by default since we cannot directly study events in the past. Thus, document analysis is an essential avenue of research for this thesis. By studying history, one is subjected to the author's interpretation of events and what the author deems important to include. The author constructs a version of history in the documents produced, thus every document can be approached as one interpretation of an event in the past. By addressing the construction of history and its implications in the field of marketing and branding, this thesis looks at the varying ways a heritage can be developed in the context of multiple author involvement. There is a prevalent assumption within the marketing and branding community that brand heritage is static, controllable, and written by one author or one marketing department. This thesis challenges these static and predefined notions of history, while opening up the notion of brand heritage to further debate. In the two subsequent sections, a literature review of brand heritage and the role of managers will provide additional details regarding the relevance of this conversation.

1.2 Brand Heritage and The Usage of History in Branding

Branding is a subsection of marketing. A brand has been defined as a “promise of satisfaction. It is a sign, a metaphor operating as an unwritten contract between a manufacturer and a consumer, a seller and a buyer, a performer and an audience, an environment and those who inhabit it, an event and those who experience it” (Healey, 2008: 6). As understood by Landa (2006): “a brand is a proprietary name for a product, service, or group [...] On a more multifaceted level, a brand is the sum total of all functional and emotional assets of the product, service, or group that differentiate it among the competition” (4). As defined by Kapferer (2008), “a brand is a shared desirable and exclusive idea embodied in products, services, places and/or experiences” (13). Anything can have a brand; there is no limit to what is brandable (Healey, 2008: 6). [see Appendix 1 for a thorough explanation of types of brands].

“To be faithful to a tradition means to be faithful to its flame and not its ashes”, said French socialist leader Jean Jaurès, illustrating the quintessence of brand heritage (in Wiedmann et al., 2011). A helpful tool in defining a brand in the context of heritage is Kapferer's *The New Strategic Brand Management*, in which he declares: “The truth of a brand lies in the brand itself. By

studying the heritage, roots and history of the brand (its DNA), potential facets of its core can be identified” (2008: 286). A brand is therefore a known name, a term, a symbol or any other distinct element (Solomon et al., 2008: 286), with which the public instinctively associates “attractive and unique values, both tangible [...] and intangible” (Kapferer, 2008: 126). An intangible value of the brand would be, for example, heritage (Kapferer, 2008: 126). Kapferer believes “identity draws upon the brand’s roots and heritage – everything that gives it its unique authority and legitimacy within a realm of precise values and benefits” (2008: 178). Likewise, Hatch and Rubin (2006) argue the contemporary significance of a brand results from the collective interpretations of the brand by the public, thus consumers have direct involvement in promoting and communicating a brand’s historical moments (41).

In recent years the issue of brand heritage and the creation of a corporate brand image through a merging of the past, present, and future has generated growing interest in both managerial practice and marketing research areas (Wiedmann et al., 2011: 182). The exact denotation of heritage is to inherit something from the past and pass it on (Balmer, 2011: 1381). Thus, heritage is a process in which the past is clarified and made “relevant for contemporary contexts and purposes” (Lowenthal, 1998). According to Urde, Greyser and Balmer (2007) this process very much applies to brands when seen through the lens of heritage. That is, “heritage helps make a brand relevant to the present and prospectively the future” (6), which is in line with the assumption of Lowenthal (1998). In contrast, history examines what is often an opaque past (Lowenthal, 1998: 147). However heritage is not the sole link to the past: “History, tradition, memory, myth and memoir join us with what has passed” (Lowenthal, 1998: 3). This means heritage is based on characteristics such as longevity and traditions, components of heritage that make a brand rich with aspects of the past and applicable to the context of the present and the future (Urde et al., 2007). Balmer (2011) also takes this perspective: “Heritage marketing celebrates a particular past through the lens of the present” (1383). However, antiquity alone is not sufficient to categorise a brand as a heritage brand. Emphasising historical content in the overall identity of a brand is of particular importance; thus, a heritage brand has “a positioning and value proposition based on its heritage” (Urde et al., 2007: 5). Moreover, heritage brands must have a “track record of delivering value to customers” over time (Urde et al., 2007: 9), which is achieved through a commitment to the core values of a brand and revealed in the symbols selected to identify the brand (Urde et al., 2007). Heritage can provide security to a brand; it can offer a sense of “certainty in a world of uncertainty” (Balmer, 2011: 1383). Another approach to the concept of heritage is that it connects individuals and groups to consumer brands, which can be described as part of identity making and connecting with the roots and origins of a particular brand (Misiura, 2006: 17). This approach involves consumer culture theory, which ex-

plores how “consumers actively rework and transform symbolic meanings encoded in [...] brands [...] to manifest their particular personal and social circumstances and further their identity and lifestyle goals” (Arnould & Thompson, 2005: 871). According to Power and Hauge (2008), branding has become so interwoven with consumption that consumers often develop strong “personal relationships to brands and brand histories” (123). Power and Hauge (2008) additionally believe “branding is becoming one of the core strategic and commercial competences driving firms and a key area within which consumers become actively involved in commodity processes” and thus, “the relationship between the contemporary consumer and producer is mediated by and governed by a reflexive construction of brands” (123-124). The process of branding involves an “attempt to strategically ‘personify’ products and to encapsulate a balance between different economic values: quality, utility, symbolic, and cultural worth” (Power & Hauge, 2008: 123-124). This personification suggests that consumers have developed a close relationship with a brand and have an influence on the direction of brand development.

Heritage is considered a value driver particularly for corporate brands, as early roots can add authenticity and uniqueness to brands (Aaker, 2004: 7). As mentioned, heritage can contribute to a “brand’s value proposition with depth, authenticity, and credibility for the customer/consumer” (Urde et al., 2007: 11), creating a strong brand identity equity. Since a brand is developed over a period of time, time “appears to be quite relative in regard to heritage branding these days” (Liebrenz-Himes et al., 2007: 141). Heritage can help define brands and add value, “especially when [...] re-interpreted in a contemporary light” (Aaker 2004: 7). A brand that is injected with a strong brand identity equity, and thus with a heritage, can help provide leverage for that brand (Aaker, 1996). According to Benson (2005), an essential component of a heritage brand is that it provides a brand story through some form of a narrative. Another characteristic of heritage brands is they demonstrate a “distinct branding category, with its own set of defining criteria and a specific approach for effective management and leadership” (Urde et al., 2007: 5), which is of particular relevance in this study. Aaker (1996) describes heritage brands as the oldest brand in their respective categories. Furthermore, he views such brands as having the “‘sincerity’ characteristics of being honest, authentic, wholesome, trustworthy, friendly, familiar, caring and unassuming” (Aaker, 1996: 230). In addition, “heritage brands are distinct in that they are about both history and history in the making” (Urde et al., 2007: 7). While history is retrospective and grounded in the past, a heritage brand embraces all time frames, including the future (Wiedmann et al., 2011: 207). According to Hudson (2011), brand heritage today is an emerging concept within the contemporary marketing discipline, yet it “refers inherently to the past” (1539). Urde, Greyser and Balmer (2007) define brand heritage as part of a corporate brand identity. They argue that from an organisational perspective, the his-

tory of a brand is important in depicting the brand as having roots fused in the past. Corporate branding plays a crucial role in building a sustainable bond between the branded company and its customers. Along with the arguments of Urde, Balmer and Greyser (2007) in their article *Corporate Brands with a Heritage*, this thesis is intending to provide insight into how a brand heritage can be rewritten and re-established by an international community, while adding to the subject of brand heritage by studying the unique notion of ‘unmanaged’ brands.

Gaining a preliminary understanding of how the concept of history is presented in previous literature within the subject of brand heritage must also be touched upon in this section of the thesis. Brand heritage authors have a tendency to treat history as a concrete event that happened before and that will be presented today; however this view of history is considered too narrow and insufficient. A frequently quoted definition of history within the field of branding is that history “explores and explains what is often an opaque past”; a definition that is contrasted with heritage, which “clarifies and makes the past relevant for contemporary contexts and purposes” (Urde et al., 2007: 6). Thus, brand heritage is considered to be the process of selecting and promoting elements of the past to suit contemporary objectives. Urde, Greyser and Balmer refer to an empirical study concerning a financial institution, which presents history as a malleable tool for brand managers that can be manipulated and reinterpreted (2007: 7). The management of brand heritage is discussed in their article under the “brand stewardship” model, which is presented as “an essential management mindset for nurturing, maintaining and protecting brand heritage” (Urde et al., 2007: 9). Additionally, they provide a detailed framework for the managerial process of uncovering, activating, and nurturing the heritage of a corporation (2007: 12). A heritage brand has been described as representing “longevity and sustainability”, which implicitly suggests that history can be sustained and maintained (Wiedmann et al., 2011: 205). Brand heritage is said to carry “socially important values [...] from past epochs to contemporary contexts and even to the future”, a suggestion that is rooted in a view of history as a marketing tool for managers (Wiedmann et al., 2011: 206). Previous literature on brand heritage tends to operate on the basis of an aesthetic, non-discursive, and non-textual approach to history, essentially presenting too narrow a construction for the more holistic concept of history. This previous view of history and heritage is a problematic one because it is limiting, unrealistic, and politically controversial due to its nature to exclude and its objective to reproduce a managerial view. This thesis advocates for a different approach to history—that multiple authors constantly rewrite it, while suggesting that brand managers, through their brand heritage building techniques, are attempting to manage the unmanageable.

1.3 The Role of Managers in Branding

Recent articles on the subject of brand heritage and brand development have emphasised the role of the brand manager. The term 'brand management' has been widely applied and used in all contexts; reinforcing the notion that brand is simultaneous with management. The meaning of the word management involves a process of control; thus, when paired with the word brand, it is implicitly suggested by users of this term that brands can be controlled. Previous research has centralised the role of the manager and the exertion of control over brands in various ways, sometimes more explicitly than others. While widespread usage of the brand management term is one coherent way, there are other references to brand control that should also be mentioned within this chapter.

Literature has covered the management of brands over time (Kapferer, 1992; Keller, 2003), the opportunities for managers to strengthen their brands through an emphasis on historical content (Hudson, 2011), and the unique criteria existing for effective leadership and management of a heritage brand (Urde et al., 2007). There have also been studies on the crucial brand management activity of building a thorough understanding of cultural contents to activate brand meaning within heritage brands (Brown et al., 2003), along with proper management of the construction of brand heritage (Wiedmann et al., 2011), the building of organisational history through a revision of the past (Gioia et al., 2002), the management of brand meaning when establishing a retro brand (Brown et al., 2003), the different management approach needed when managing a corporate brand (Harris & de Chernatony, 2001), and the process of leveraging a corporate brand across markets to make brand management both easier and more effective (Aaker, 2004). Each of these studies have in one way or another highlighted the position of management when creating, establishing, supporting, and expanding corporate brands and brands with heritage. The vocabulary used throughout, for example words such as 'building', 'constructing', and 'leadership', are verbs synonymous with a human process—in this case, the manager's management of a brand. The articles mentioned describe the processes undertaken by management to control a brand. They suggest ways in which brand managers can alter or emphasise specific aspects of a brand (in this case, namely the heritage of a brand). They place the role of the brand manager in a critical position with regards to preserving a brand image, or alternatively, re-defining a brand image. They view a brand manager as capable of making changes to a brand and communicating the message of a brand to mass consumers with diverse backgrounds.

While previous literature has focused on notions of central management in regards to brand development and control, it has also been suggested by some that the role of the brand manager could be considered problematic and unnecessary. Low and Fullerton (1994) claim little attention has been given to the question of “whether the brand manager system is the best organizational structure for managing brands” (173). They add that “brands were developed and managed, in many cases with striking success, long before the brand manager system was devised”, and thus they question the future of brand managers and “the continued viability of the brand manager system” (1994: 174, 187). Shocker, Srivastava, and Ruekert (1994) suggest brand managers have come under intense scrutiny because inexperienced managers have been given the important role of managing a brand with a short-term focus (149). Fournier (1998) claims there exists a gap between how consumers and brand managers view a brand, since “the abstracted, goal-derived, and experiential categories that consumers create for brands are not necessarily the same as the categories imposed by the marketers in charge of brand management” (367). Iglesias, Singh and Casabayó (2011) believe that as the focus of brand management widens to a corporate branding perspective from the previous product/service branding perspective, “classical brand management theories and many of their assumptions may need to be revised and sometimes rethought”, requiring the field of brand management to incorporate “a wide spectrum of methodologies to cope with these challenges” (438). Suggestions of a revolution within the field of brand communication have been made; as the influence of the media in the construction of a brand image has become more important, a loss of control on the part of brand managers has occurred as consumers become more influential in defining a brand in a process labelled the “brand hijack” (Cova & Pace, 2006; Iglesias et al., 2011).

In general, previous research has centralised the role of the brand manager and the ability to control the heritage of a brand. This is the foundation of this thesis, for in contrast to widespread notions of brand heritage, we examine the organic growth and development of brand heritage in the absence of centralised brand managers, in circumstances with various authors and conveyors of a brand heritage message. We examine brand heritage as a consequence of the organic development of notions of history and myth communicated by participants and independent entrepreneurs. The purpose of this thesis is to contribute to current literature within this field by problematizing the role of managers in a brand context and by problematizing the conception of history, essentially the gap we have found within current literature on the subject of brand heritage management.

1.4 Thesis Focus

To study the subject of brand heritage, this thesis uses two sports umbrellas as a case in point of a wider circumstance: an example of how heritage branding is communicated by multiple authors. The two sports umbrellas of equestrianism and martial arts were chosen for a few reasons. First, their ancient roots and their differing treatment of history and myth provides two unique examples of the development of brand heritage within this study. Both sports have a rich history and seem to contradict one another in their approach to history. Moreover, it was of integral importance to find two cases not managed by any strong governing body/group that might resemble an authoritative marketing or branding team. The construction and maintenance of history and heritage within these sports as conveyed by multiple authors is an interesting pathway for studying the topic of brand heritage. Furthermore, the international appeal of both sports provided an opportunity to generate an understanding of communicating collective history and heritage across various cultures and borders. By examining the two sports umbrellas of equestrianism and martial arts, this thesis will seek to understand the different ways of treating, using, and handling history in marketing and branding.

Thus, this thesis will contribute to a specific subgenre of branding: the rewriting of history and the development of heritage. The multiple author involvement and the ambiguous construction and maintenance of history within these two sports umbrellas makes it an ideal case study. Our approach through the use of these two sports is to emphasise a greater phenomenon, that is, the communication of history over time and through multiple authors, and the natural establishment of a brand heritage. The topic of rewriting history is both relevant and interesting in present-day studies of brand heritage, and by opposing the nature of history and the writing of history within this thesis, our subject of examination is grounded in an adversarial position. History is constantly in a state of flux, ever reproduced, revised, communicated, challenged, and shared, while multiple authors each select certain facts to emphasise while downplaying others.

Understanding brand heritage and heritage building in a natural setting can have implications within brand management in all industries. This thesis will attempt to transfer the idea of rewriting history within two sports umbrellas into a wider corporate applicability. It is therefore helpful to approach the sports industry as a corporation or a business, rather than a product, to comprehensively translate findings into a wider context. Corporate branding differs from product branding in its expression of “enduring ambitions and the values and beliefs of all connected with the enterprise” to generate lasting trust through shared interests (Hatch & Schultz, 2008: 10). An essential component of corporate branding is the connection to its history, which permeates through all aspects of the corporate brand (Hatch & Schultz, 2008: 10). The notion

of corporate branding is of major relevance in this thesis for what it shares with the two sports umbrellas. Equestrianism and martial arts can be considered corporate brands per se, rather than tangible product brands, because the identity of the brand is long lasting and enduring, it has a strong connection to its historical roots, and it is harnessing the shared values and beliefs of all participants. The applicability of the branding of the two sports umbrellas can thus provide insight into larger aspects of corporate branding within multiple industries.

The conversation surrounding brand heritage has emphasised the role of the brand manager in developing, communicating, and managing said heritage. This thesis challenges the role of the centralised, autocratic brand manager in the establishment of a brand heritage and views heritage building as something that is dynamic and that involves multiple authors. Through a study of the development and communication of shared history, this thesis challenges the brand manager role. Further understanding of brand heritage and heritage building in its natural setting, void of any one, overbearing management presence, can have implications upon brand managers in all industries. The objective of this thesis is to build an introductory understanding of whether brand heritage can organically develop through unencumbered and independent handling and rewriting of history and myth, and through the voices of multiple authors. In doing so, this thesis constitutes a first step towards challenging preconceived notions of brand heritage and heritage building, attempting to provide an understanding of the effects of an absence of centralised brand management, and later applying this to a corporate context. This study could encourage further research in this increasingly important field, helping obtain comprehensive and managerial knowledge about natural brand heritage building and its relation to brand equity. Thus, the research question for this thesis is:

- How does brand heritage unfold over time and through multiple authors? -

In this thesis we conduct an in-depth document study, aided by the use of theoretical tools involving an understanding of history, myth, and narrative analysis, as well as the careful selection of two sports umbrellas, which provides us with an opportunity to thoroughly understand the documents studied—a crucial component in researching the wider phenomenon of natural heritage branding.

CHAPTER II

THEORETICAL FRAMEWORK

2 Theoretical Framework

In the theoretical framework chapter, we will present a comprehensive understanding of the theoretical tools in which we draw from to support our research question in this thesis. First, an understanding of the meaning of history; second, an understanding of the meaning of myth; and third, an understanding of narrative analysis/storytelling. These concepts will be used to build our analysis and investigate our research question throughout the thesis.

2.1 Understanding History

Before investigating the use of history within branding, it is first necessary to understand the meaning of history, by asking the question ‘*what is history?*’ A good starting point is the book of this title by E.H. Carr (1987), who defines history as “a continuous process of interaction between the historian and his facts, an unending dialogue between the present and the past” (1987: 30). His outlook on history is fundamentally socially constructed, a present perspective on the past, a “contemporary history” that evaluates previous events through a present analysis while considering a modern interpretation of what is thought to be important (1987: 21). The present and the past are conjoined—one cannot escape the other and they must be considered “in their mutual relations” (1987: 21). Carr believes the past “is not a dead past, but a past which in some sense is still living in the present”, and for this reason the notion of ‘pure’ history does not exist, since history is always filtered through an individual’s perspective or understanding, in one form or another (1987: 21-22). All history is thus a means of interpretation, where the past is understood “through the eyes of the present” in all forms, including language, dialogue, and other current connotations that are unavoidable and forbid any neutrality (1987: 21). History is rooted in the present and should be regarded as a “moving procession”, where everything is in flux and everything is a product of history (1987: 25). What the historian chooses to document is as important a factor as studying the way he documents; thus in order to fully understand history it is vitally important to understand the historian behind the history (Carr, 1987). Perhaps Carr’s most insightful interpretation is his take on reciprocal interaction and “the dialogue between present and past”, which he considers a dialogue “between the society of today and the society of yesterday [...] The past is intelligible to us only in the light of the present; and we can fully understand the present only in the light of the past” (1987: 55). An understanding of the past must be gained in order to have a sense of the future, and over time our interpretation of the past, through our selection of what is significant and what is relevant, evolves (Carr, 1987: 123). Thus, history can never be fully objective because it acts as a progressive and “constructive outlook over the past”, where events are attributed different levels of significance (1987: 109). Carr’s analysis of history is a product of modern society that is constantly evolving and reflecting our view of society today, and the questions we ask and the answers we

obtain “are prompted by our system of values” (1987: 131). Carr uses the words of Jacob Burckhardt in the book *Judgements on History and Historians* to emphasise his positioning on history as “the record of what one age finds worthy of note in another” (1987: 55).

Ian Mortimer presents a second interpretation of history in his article *What isn't History*, a follow-up to the aforementioned book by E.H. Carr. Mortimer's article attempts to understand “what we are doing when we study the past”, and suggests that documenting history is not an act limited solely to historians, for “many sound understandings of historical events are formed by popular writers and journalists, not academics” (2008: 457, 458). History is not confined to anyone; all individuals can play a role in shaping history and engaging with the past (Mortimer, 2008: 461). Mortimer argues that individuals who document history play an important role because their record of history is also a “product of their characters, imagination, creativity and experiences, as well as historical evidence”, and thus they have the ability to shape our outlook on the past (2008: 460). Making history is a free communal process undertaken by a society, which is open to many varied interpretations or criticisms—where alternative interpretations are always possible (Mortimer, 2008: 460-461). With this in mind, Mortimer presents his concept of ‘free history’, which “lies somewhere between ‘what happened in the past’ and ‘what historians do’, being less than the former and more than the latter” (2008: 462). Mortimer believes free history is a constant engagement, an individual experience, and can include anything that existed in the past (2008: 461). All documented history is conditioned by “experiences, prejudices, ability to access and understand evidence, and [...] chosen literary style and vocabulary (Mortimer, 2008: 464). Free history provides a different outlook on what happened, an outlook that is looser, more malleable, and “uncluttered by unsatisfactory assumptions” (Mortimer, 2008: 464). Mortimer sees the past as something that can be “infinitely re-interpreted” by way of a “socially constructed activity involving trust” (2008: 469; 471). Not only does Mortimer see public involvement in the shaping of history as something which is beneficial, he sees it as something which is necessary: “If the public is not involved as an audience in this exercise of representation, there is no level of trust underpinning it except the historian's own [...] history is a dialogue, and the representation of the past requires the participation of an attentive audience, capable of both trust and criticism” (2008: 472). Free history provides an escape from the untrustworthy documentation of events solely by historians, as Mortimer puts it, it is “the way forward: to be aware of the limitations of language, evidence and perspective, the impossibility of both complete subjectivity and absolute objectivity, not to mention the limits of narrativity” (2008: 474).

Pierre Nora further reinforces the idea of history as a collective entity in his article *Between Memory and History: Les Lieux de Mémoire*. His perspective on history is “the reconstruction, always problematic and incomplete, of what is no longer [...] a representation of the past” (1989: 8). Nora sees history as belonging to “everyone and to no one”, binding itself “strictly to temporal continuities, to progressions and to relations between things”, and which “can only conceive the relative” (1989: 9). History acts as a collective memory, but in order to gain a sense of the past “a chasm had to intervene between the present and the past” (Nora, 1989: 16).

Another book that can be used to further explain the role of history is *The Nature of History* by Arthur Marwick, which attempts to understand what history is, and how one does history (1989: 1). Marwick’s interpretation is that history cannot be reconstructed or crafted by historians; they can only “contribute to historical knowledge” (1989: 3). History as an activity is cooperative and cumulative and socially influenced, individuals will each interpret what is written about history in contrasting ways and for these reasons history is autonomous in nature (Marwick, 1989: 8, 11-12, 17). Marwick is critical towards the idea of organising history and denounces the reflexive tone the discipline has adopted (1989: 18). The main objective of history should be to add to historical knowledge rather than attempting to reinterpret what has already been said about it, thus any nomothetic or holistic approaches to studying the past should be rejected (Marwick, 1989: 18-19).

A final perspective on history that should be included is from Keith Jenkins. In his book *Rethinking History* (2004), Jenkins defines history as “one of a series of discourses about the world [...] These discourses do not create the world [...] but they do appropriate it and give it all the meanings it has” (6). Fundamentally, Jenkins believes “history is a discourse about, but categorically different from, the past”; history is not the past (2004: 7). For this reason historians are able to modify and emphasise certain elements of the past that they deem important, essentially writing people and groups and events back into history. This process of interpreting and reinterpreting is an endless one, since the past comes to us in the form of stories we are unable to extricate from these narratives to verify whether or not they correspond to the real past; thus “these ‘always already’ narratives constitute ‘reality’” (Jenkins, 2004: 11). Like Nora, Jenkins believes the past and history are two separate entities, but since the available content for recording history is endless, only a small fraction of what has happened can be adequately recorded: “the sheer bulk of the past precludes total history” and thus “history is less than the past” (2004: 7, 14, 15). He believes that since we cannot return to the past, we are left to judge the accuracy of our historical accounts upon other historical accounts, with history inevitably remaining a personal construct (Jenkins, 2004: 14). For these reasons Jenkins describes history as a “shifting

discourse”; we are products of the past, and history is an artefact of our present (2004: 16, 15). History is used for many different reasons and it selects which aspects of the past to highlight, it changes, it exaggerates, and it conflates what has occurred (Jenkins, 2004: 24, 16). A more unique interpretation from Jenkins is history as an “embattled terrain”, where individuals and groups construct history merely to please themselves, and consensus is reached only when “dominant voices can silence others” (2004: 23). His overarching definition of history is “a shifting, problematic discourse, ostensibly about an aspect of the world, the past that is produced by a group of present-minded workers” (2004: 31). In essence, Jenkins feels that “the truth(s) of the past elude us; that history is intersubjective and ideologically positioned; that objectivity and being unbiased are chimeras; that empathy is flawed; that ‘originals’ do not entail anything ‘genuine’; that history is, in opposition to it being an art or a science, something else – something sui generis, a worldly, wordy language game played for real” (2004: 67).

There are universal threads within each of these perspectives that can offer a comprehensive understanding of what history is and how it can be used. History is different from the past; it is a present day perspective on the events of the past that are deemed important through the eyes of the historian. History is not static; it is in a perpetual state of evolution and can be interpreted in different ways by different individuals. Everyone has access to history and is able to influence it in some way. History is there to be used for the purposes we decide upon. This thesis deals with the rewriting of history. History will be approached as the outcome of a written document: rather than a collection of actions and events and decisions, history is merely the process of writing and rewriting. It has everything to do with language and is an outcome of language; thus, it is a discursive practice. Ruth Wodak wrote an article titled *History in the making/The making of history* in which she offers an “overview of an interdisciplinary study on ‘the discursive construction of the past’” (2006: 126). Wodak describes the process of recontextualization: when arguments are given new meanings, first by decontextualization and then by recontextualization (2006: 132). She sees this as one of the “most important processes of text production” (2006: 132). This thesis will study the recontextualization of the collective past, using Maurice Halbwachs’ interpretation of a collective memory: that “every individual memory is a viewpoint on the collective memory” and that attempts to preserve this shared memory (1967: 31).

Understanding the process of rewriting history is of particular relevance to brand managers today. Managing a brand is a process of sharing and documenting, of conveying brand meaning and symbolism, where brand managers adopt a role comparable to that of an author. On a metaphorical level, brand managers are very much brand authors. When dealing explicitly with

brand heritage, this connection intensifies. The consequences of this study will seek to better comprehend the process of developing and fostering a shared, collective history in the absence of any large governing body such as a marketing team or a brand management team. This thesis will explicitly cover aspects of heritage building in a natural setting, which can have implications on brand managers in all industries.

2.2 Understanding Myth

This thesis focuses on history as a product of writing and as a documented version of something, whether it be a story, an event, a person, a description, or a quote. It is important to recognize that the collective value of certain elements of history is more constructive for this thesis than searching for truths to either confirm or deny a collective piece of history. The verifiability of collective history is of second importance to developing an understanding of how this collective history is rewritten and reflected upon. A collective history that is not grounded in truth or fact is as important as one that is. The sharing of histories and the recontextualization of these histories is of paramount importance in this study.

For this reason it is important to also provide an understanding of the meaning and the use of myth. One way of writing and rewriting history is by means of distributing myths of some kind. A culture is partly constituted by myths that are traded from one generation to another, and these two sports umbrellas feature strong histories and shared myths as a way of describing their heritage. Rather than seeking confirmation for how grounded in truth these myths actually are, it is useful to study how the myth helps shape the shared identity.

The philosopher Roland Barthes wrote a collection of essays titled *Mythologies* in which he examines the value of modern myths. For Barthes, a myth can be defined simply as “a type of speech”, and with a definition this encompassing, “everything can be a myth provided it is conveyed by a discourse” (1984: 1). A myth does not necessarily represent a falsehood; neither does it confirm a truth. A myth “hides nothing and flaunts nothing; it distorts; myth is neither a lie nor a confession: it is an inflection” (Barthes, 1984: 10). Much of Barthes’ focus about myths revolves around language and its usage. He describes a myth as “language robbery” and “speech stolen and restored”, because “language is a form, it cannot possibly be either realistic or unrealistic” (1984: 11; 9; 14). Myths use language for their own development, and yet “myth is experienced as innocent speech [...] because they are naturalized” (Barthes, 1984: 11). Barthes argues that individuals are able to innocently consume myth because it is seen as an inductive system, yet mythical concepts can “come into being, alter, disintegrate, disappear completely” (1984: 11; 6). Myth can develop out of any meaning, or even out of the lack of any meaning,

thus nothing is entirely safe from myth (Barthes, 1984: 11). Barthes sees myth as transforming history into nature, and depriving the “object of which it speaks of all history. In [myth], history evaporates” (1984: 10; 20). Yet the function of myth is not to deny anything, but rather to talk about things, to purify and make innocent, to give an eternal and natural justification, and to clarify (Barthes, 1984: 16).

In his essay *History and Myth*, Peter Munz examines the parallel discourses of history and myth, and the perpetual connection they seem to share. Munz fundamentally sees history and myth as interdependent, since they “fertilise each other; and it is doubtful whether the one could exist without the other”, but he sees vital importance in distinguishing the two (Munz, 1956: 1). He believes the reason for the detachment between myth and history lies in its overall vagueness regarding specifications of space and time; thus, there occurs “the distension of myth into history and the telescoping of history into myth” (Munz, 1956: 2). A myth generates its truthfulness not through its historical accuracy, but through its exhibition of “universally true features” (Munz, 1956: 3). He feels history and myth both involve stories about concrete events, but mythological thinking incorporates concrete universals, and “the concrete universal story has a universal fascination” (1956: 1, 3). In fact, Munz goes so far as to argue, “true myth yields significant history [...] the elaboration of a historical narrative of *res gestae* depends upon the pre-existence of a myth” (1956: 5). Munz compares the primacy debate between history and myth to the chicken and the egg debate—it is ceaseless and redundant (1956: 8). Perhaps Munz’s most useful analysis is that both history and myth are important; one is not more important than the other, and we cannot overshadow one with the other. They both provide valuable insights into a society. Despite their close ties, they are two separate entities, and must be approached and handled as such.

Taking into consideration both Barthes and Munz’s interpretation of myth, it is fair to conclude that a myth is an institutionalised and well-established way of describing the development and the historical interpretation of something. A myth is connected to history, but it is unclear which develops the other: perhaps history builds myth, or myth builds history, or possibly there is an overlap of the two. Both history and myth “remain valid and valuable forms of explanation [...] people will continue to seek meaning in history, and will continue to develop myths to help them in this effort” (Heehs, 1994: 19). History is perhaps better defined as ‘mythistory’, since it has been suggested “there can be no real distinction between the discourses of myth and history, between fact and fiction” (Heehs, 1994: 1). There is a general tendency to regard myths as stories that some people “believe or once believed to be true, but that are not really true”; however this is not the most distinguishing function of a myth (Ausband, 2003: 1). A myth por-

trays an “expression of the order a society perceives in itself and in the world at large” (Ausband, 2003: preface). We are endlessly seeking to find order in our world, and “the system of tales and traditions we call mythology is a primary way of reinforcing that order” (Ausband, 2003: 1). The purpose of mythology is to “make the world coherent and meaningful by demonstrating or imposing order on it” (Ausband, 2003: 2). Thus, the role of myth in society is essential. These varying interpretations of both history and myth highlight the hazy distinctions of what defines both history and myth, as well as what the purpose is of both. This thesis will approach history and myth as crucial constructs of society that are valued on the basis of their usage and added benefit to society. Whether a myth is true or false is inconsequential. What matters most is how the members of these societies use history and myth to define themselves and their roles.

2.3 Understanding Narrative Analysis

Roland Barthes (1977), the widely quoted semiologist on the role of narratives in social sciences, defines narrative as a “variety of genres, themselves distributed amongst different substances” (79). Substances are various forms of language, spoken or written text, images and gestures. Barthes believes narrative exists in all forms: legend, history, myth, tale, fable, epic, tragedy, comedy, drama, novella, mime, cinema, painting, stained glass windows, news, and conversations, as in “every age, in every place, in every society”, beginning with the history of mankind, there has never “been a people without narrative” (Barthes, 1977: 79). For Barthes, narrative “is simply there, like life itself” (1977: 79). Other authors have also explained the significant meaning of narrative (Cortazzi, 1993: 1): Polkinghorne (1988) believes narrative is “the primary scheme by means of which human existence is rendered meaningful” (11), while Mitchell (1981) suggests narrative is used to “represent and restructure the world” (284). Bruner sees narrative as “the organizing principle by which people organize their experience in, knowledge about, and transactions with the social world” (1990: 35). Chafe (1990) defines narrative as “overt manifestations of the mind in actions: as windows to both the content of the mind and its ongoing operations” (79). Consequently, narrative inquiry makes beneficial contributions to the social sciences due to its experiential, open-ended, quest-like qualities (Conle, 2000: 50).

Narrative analysis is more than a research tool used in case studies (Bell, 2002); it is an approach to analysing and interpreting produced language (Easterby-Smith et al., 2008: 182) and is based on an epistemological belief that humans make sense of the world by imposing story structures (Bell, 2002: 207). Thus, narratology (Onega & Landa, 1996) is an examination of how people describe events through the telling of stories (Easterby-Smith et al., 2008: 182). Based on this epistemology narrative analysis can be viewed as receiving insights into an individual’s mind or

culture, or as “opening a window” to the mind of social actors, as Cortazzi metaphorically describes (Cortazzi, 1993: 2). Narrative analysis can thus be defined as a discipline investigating the ideas and philosophy behind narrative text (Todorov, 1969; Prince, 1982; Bal, 1985; Chatman, 1988).

Onega and Landa (1996) suggest narratology is the source of many analytical tools and key concepts that have increasingly been applied to study a wide variety of texts. Viewed as a research tool, this technique has increasingly proved to be useful for organisational studies, where research deals with the interpretation of stories in one way or another. This approach is most applicable in the analysis of text-based material (Easterby-Smith et al., 2008: 182). Bryman and Bell, as well as Easterby-Smith, Thorpe and Jackson, argue that narrative analysis is concerned with the “sense of temporal sequence” (Bryman & Bell, 2011: 531) and “the sequential patterning of events” (Easterby-Smith et al., 2008: 183). Moreover, Easterby-Smith, Thorpe and Jackson (2008) refer to the “temporal order of ideas” that social actors provide through narratives. In a sequence of events where “a self and others are involved”, the self could be an “individual, [...] or could be related to a corporate entity” (Easterby-Smith, 2008: 183). In *Narratives in Social Science Research* by Czarniawska, Alfred Schütz is cited explaining the impossibility of comprehending human action while disregarding human intentions, and it is impossible to comprehend human intentions while disregarding the setting in which they make sense. The setting Schütz refers to may include institutions, sets of practices, or other context-related settings established by humans. Moreover, contexts containing a history, within which stories of social actors exist, must “be situated in order to be intelligible” (Schütz, 1899-1959 in Czarniawska, 2004: 4). Narrative analysis considers stories, told by individuals and which have taken place at different times (Mandler, 1984). Mandler (1984) believes all stories have a certain basic structure known as the “story grammar, [which is] the analysis of a text, a search for *intentio operis*, or a semiotic strategy” (Czarniawska, 2004: 82). Within a story structure there are three episodes (beginning, development and ending), occurring in a setting, and including the introduction of the protagonist and other characters, the time and place of the story, and one or more episodes that frame the story and form the plot of the story. In the ‘beginning’ of the story one or more events are introduced, followed by the ‘development’, demonstrating the reactions of the protagonist and other members of the story. Moreover, a goal is announced that should handle the events mentioned in the ‘beginning’, tied up with an outcome such as success or failure in dealing with the events. The story concludes with the ‘ending’, including a comment regarding the consequences of the episode(s), or a moral lesson. (Czarniawska, 2004, 82-83)

According to Benson (2005), an essential component of a heritage brand is that it provides a brand story through some form of a narrative. Pavlenko (2002) argues that narratives are not purely produced by individuals, but are shaped by historical, cultural, and social conventions as well as “the relationship between the storyteller and the interlocutor” (214). As a result, Bell (2002), Peacock and Holland (1993) derive that story structures disclose information about the social, cultural, and historical settings within which the storyteller exists. Bell (2002) believes narrative inquiry is conducted with an understanding of the stories people tell, which are often connected to a more complex, underlying story. He argues, “all stories rest on and illustrate the story structures a person holds” (209). The potential valuable knowledge source story structures provide makes narrative inquiry beneficial while “allow[ing] researchers to present experience holistically in all its complexity and richness” (Bell, 2002: 209). Therefore, narratives are powerful constructions that can work as mechanisms of social control (Mumby, 1993). Hence, in this thesis we attempt to decode different forms of storytelling occurring as a component of rewriting history. We also view history as a narrative, and narrative as closely related to myth. This will guide us in our interpretation of the meaning of narratives in a way that should lead us to a comprehensive understanding of the usage of history in branding. Since narratives are, according to Pavlenko (2002), not entirely produced by individuals, we primarily focus on the social and cultural meaning behind the narrative, thus we attempt to read between the lines while viewing the relationship between the storyteller and the interlocutor as one of major importance. Through the use of narrative we can understand and communicate people and events (Conle, 2000) and refer these findings to our own context. Accordingly, narrative analysis “is seen as particularly suited to get at such practical knowledge” (Conle, 2000: 51).

2.4 Chapter Summary

The literature and theory reviewed thus far in this thesis provides a multifaceted backdrop for investigation of the research question. By introducing a literature review of brand heritage and history and the role of managers in branding, the academic conversation for which this thesis attempts to add value, as well as the theoretical notions of history, myth, and storytelling, which act as the starting point for this thesis, a comprehensive framework is established. The starting point for our theoretical framework involves literature we wish to draw upon as theoretical tools to enhance our analysis: concepts such as history, myth, and storytelling. The focal point of our literature review involves discussions we wish to contribute to and the academic conversation this thesis is directly involved in: brand heritage. Our theoretical approach involves the discursive approach to history. Applying this approach to the organic dissemination of brand heritage and history of two sports umbrellas is considered a metaphor for the wider application of corporations and corporate branding. While sports is emphasised within this thesis, and the

two broad sports umbrellas act as the focal point for further investigation, this paper aims to use sports as a case in point for the general study of brand heritage and managing in the absence of brand managers. This paper empirically studies sports as a means of studying the research question, which has a broader application within the areas of marketing and branding, and which will be introduced in the method chapter.

CHAPTER III

METHODOLOGY

3 Methodology

In the methodology chapter we will argue for our methodological reasoning and our applied research method. We will start with a case introduction to the two sports umbrellas of equestrianism and martial arts by providing a brief synopsis for each, followed by the research philosophy including an explanation of how the background information gathered about history and history within branding influenced our choice of ontology and epistemology. Within the research approach, the methodologically interesting aspect of our research problem is presented. The approach of the research strategy is then mentioned, accompanied by our choice of data collection method and why a document study was most applicable for our research question. Finally, we will clarify the methods of data analysis and interpretation. Providing clarification about methodological positions is important, since techniques are used to investigate a specific situation, whereas the method is usually an individual modus for collecting data.

3.1 Case Introduction

This thesis has chosen a focus on sports, namely equestrianism and martial arts, for a multitude of reasons. First, both authors have first-hand experience participating within these two sports umbrellas and have a general familiarity in how they operate at the grassroots level. Second, it was of integral importance to find two cases both rooted in history and myth that operate in the absence of any strong governing body or group that might resemble a marketing/branding team. Third, the international appeal of both sports made them intrinsically fascinating to this study, as a way of generating an understanding about communicating a message of history and heritage across various cultures and borders. Their ancient roots and their differing treatments of history present two distinct approaches to historical branding: at first glance, while equestrianism attempts to emphasise and reproduce its heritage, martial arts attempts to rewrite and redefine its heritage. [See Appendix 2 for a more detailed explanation of sports marketing]

3.1.1 What is Equestrianism?

Equestrianism includes both the riding and driving of horses. This broad term commonly encompasses horses used for working purposes as well as leisure activities and competitive sports (Miller, et al., 2009). Equestrian sports also encompass numerous sub-activities, which are considered general horse sports (Wikipedia, 2012a), but for brevity they will not be dealt with in this thesis. In order to provide a comprehensive understanding of one of the two sports umbrellas discussed in this thesis, this section will select a few definitions that are most appropriate in explaining the meaning of equestrianism and that can be understood in connection with the overall topic. The website of the 2012 London Olympic Games states that equestrian sport is thought to have appeared more than 2000 years ago as the Greeks of the time began training their horses for the purpose of using them in battle. (London Olympics, 2012). In the present

day, the most popular equestrian sport activities are dressage, eventing, and jumping, all officially registered as disciplines at the Olympic Games in 2012 (London Olympics, 2012). Dressage had its zenith with the development of the Spanish Horse Riding School in Vienna, “which laid the basis for the elegant, graceful sport practised today” (London Olympics, 2012). According to the *London Olympics* (2012), dressage, which demonstrates the “harmony between horse and rider”, and jumping, also known as “show jumping”, which considers “precision, agility and impeccable technique” to be paramount, are both classified as part of the “Eventing competition” during the Olympic games (London Olympics, 2012). For a more precise definition of equestrianism, the *American Heritage Dictionary* and *Wikipedia* are useful. Accordingly, equestrianism stems from Latin ‘equester’, which means ‘horseman’ or ‘horse rider’. (The American Heritage Dictionary, 2011; Wikipedia, 2012b). More precisely, equestrianism is known as horseback riding and refers to “the skill of riding, driving, or vaulting with horses” (Wikipedia, 2012b). Horse racing as an equestrian sport has a long history, and is thought to have been developed in ancient Babylon, Syria, and Egypt (Wikipedia, 2012c). The most well-known kind of horse racing is “thoroughbred racing, [which] was popular among aristocrats and royalty of British society, as wealthy individuals vied to acquire the fastest, strongest horses for competition, hence earning it the title ‘Sport of Kings’” (Wikipedia, 2012c). Horse racing is not registered as official equestrian sport within the Olympic games. It appeared briefly in the ancient Greek Olympics of 648 BC, but has made no appearance in contemporary times (London Olympics, 2012; Wikipedia, 2012c).

3.1.2 What is Martial Arts?

Martial arts is an encompassing field of sport that originated as a form of self-defence and attack. It is of Asian origin, primarily China, Japan, and Korea. There are numerous available definitions for martial arts, and in order to present a comprehensive understanding of the sport umbrella, this thesis will touch upon a few. The word martial comes from the Latin *martialis* and means, “to do with war” (Gifford, 2010: 6). *Martial Arts for Dummies* defines martial arts simply as “systems of combat techniques designed for self-defence [...] All martial arts have a philosophical foundation” (Lawler, 2003: Introduction). Another definition is: “various methods of armed and unarmed combat, originally used in warfare in the Far East and shaped by Oriental philosophical concepts, notably Zen Buddhism” (Hill, 2008: 1). A more substantial definition that is provided is: “Commonly, any of several fighting styles which contain systematized methods of training for combat, both armed and unarmed; often practiced as a sport, e.g. boxing, karate, judo, Silat, wrestling, or Muay Thai. Can also include military tactics such as infantry manoeuvres, aerial combat, and so on” (Hill, 2008: 1). The definition provided on *Wikipedia*, the free-content, openly editable encyclopaedia, is: “Martial arts are extensive systems

of codified practices and traditions of combat that are practiced for a variety of reasons, including self-defence, competition, physical health and fitness, as well as mental, physical and spiritual development. The term martial art has become heavily associated with the fighting arts of eastern Asia, but was originally used in regard to the combat systems of Europe as early as the 1550s” (Wikipedia, 2012d). All martial arts have their own rules and styles, while some martial arts have further split into different schools or systems (Gifford, 2010: 7). Martial arts is a particularly interesting case because of the emphasis placed on its history: “part of the appeal of martial arts is the stories [...] The myths that surround martial arts are as much a part of their attraction as the skills they provide to beat off muggers and defend loved ones” (Sharif, 2009: 1). Thus, martial arts is encompassing in its broad definition, yet fragmented within its varying styles and approaches.

3.2 Research Philosophy

Our point of departure in heritage branding has permitted us to apply certain research philosophies to this thesis. Choosing the correct philosophical positioning for the thesis is of major importance since it “underlie[s] the design of management research” and affects the research strategy, design, and data analysis method; in short: “the overall arrangement which enable satisfactory outcomes from the research activity” (Easterby-Smith, et al., 2008: 57). An understanding of philosophical backgrounds is recommended as it clarifies research design and provides answers to basic research questions (Easterby-Smith, et al., 2008: 57). This thesis follows an inductive approach since we generate findings on the basis of an empirical investigation of data, thus studying the relation between theory and data. The inductive approach is applicable for this thesis because by taking an exploratory investigation, one can examine a research problem that has not yet been clearly defined. An inductive approach was also necessary because of the scarcity of knowledge related to brand heritage building within the sports industry; data is thus collected as a means of developing an empirical investigation of data within this thesis (Bryman & Bell, 2011: 4, 7). “Phenomenology, as both a philosophy and a methodology” has been used in organisational research “to develop an understanding of complex issues that may not be immediately implicit in surface responses” (Goulding, 2005: 301). Due to the scarcity of knowledge related to brand heritage building within the sports industry, an inductive approach was required; data is thus collected as a means of theory building within this thesis (Bryman & Bell, 2011: 4, 7). The comparative analysis between the two sports umbrellas serves to understand the wider phenomenon of the natural development of brand heritage. An interpretivism understanding is adopted, taking the social sciences approach of incorporating a strategy that “respects the differences between people and the objects of the natural sciences”, keeping in mind the “subjective meaning of social action” (Bryman & Bell, 2011: 16, 17). The approach of view-

ing a situation through the eyes of individuals is, as Bryman and Bell (2011) state, in line with interpretivism and mirrors the “epistemological links with phenomenology, symbolic interactionism and *Verstehen*” (403).

Epistemology is the process through which knowledge is gained. Building upon the arguments of Mortimer (2008), it is clear that an epistemological view must be taken into account for this thesis, since the rewriting of history and the documentation of history is a production of humankind and can reflect the personal views and opinions of the document producers, and to a certain extent, the document consumers/readers as well. Viewing humans or historians as social actors and seeking to interpret their social viewpoints falls within the interpretivism epistemology. The act of writing and documenting is a human activity—it cannot be produced in any other way by any other mechanism. This differentiates document study within this thesis, as a product that cannot be produced in the absence of a human documenter.

The act of rewriting history is a human process that requires human involvement at all times and throughout all stages. A document can be described simply as a product of the producer(s) behind it. The cooperative and socially influenced nature of history allows this thesis to generate data related to specific subcultures within the sports umbrellas. A closer study of language and imagery within the documents analysed can help describe the identity of participants and their personal interpretation of history and myth. Philosophical hermeneutics is “concerned with the theory and method of the interpretation of human action”, and since the process of writing and rewriting is a direct human action, this approach can be useful when generating further understanding of human behaviour within the two sports umbrella subgroups, namely equestrianism and martial arts (Bryman & Bell, 2011: 16). By adopting a social constructionism approach, the research can investigate the unmonitored creation of group identity and shared history, and a general impression of the shared views of collective history and myth can be determined. Moreover, by studying documents that are related to context of this thesis we become part of the rewriting process. The authors of the documents selected for analysis create their own unique viewpoint of history, but we also become integrated into the brand heritage development conversation through our interpretations of the selected documents.

3.3 Research Approach

The methodological starting point for this thesis is to investigate a wider phenomenon by means of studying something else. Rather than focusing on the top-of-mind idea in branding (to study a corporation), this thesis focuses on a lesser area of study (general sports umbrellas) as a way to investigate the concept of brand heritage. Brands and brand heritage is an area of study

the business and marketing world has occupied for quite some time, yet brands exist outside of business that can present an unusual and untapped area of study. A brand is a more open concept than the marketing field predominantly acknowledges, and this thesis uses the concept of brand as it relates to a field outside traditional business. By using the two sports as a means to study something else, this thesis attempts to provide an understanding of brand heritage when a marketing team is not involved in the brand building and managing process. A methodologically interesting point within this thesis is instead of focusing on the first idea that comes to mind when we thinking of studying ‘something’ (branding), we instead study ‘something else’ (sports umbrellas), to relate the findings back to the research topic—the negation of brand management.

3.4 Research Strategy

While there is knowledge about heritage in marketing and management within the fields of heritage marketing, heritage tourism, and corporate heritage branding (Balmer, 2011: 1381), heritage in a sports context has received little attention to date. Thus, an exploratory approach should be implemented since it is widely used as a means of gathering “preliminary information [in a particular field] that will help to better define problems and suggest hypotheses” (Kotler et al. 2005: 345). Initial empirical information found within the research field helps us gain a deeper knowledge and a more thorough understanding of the subject, thereby allowing us to build upon this knowledge through an appropriate research strategy and data collection method with the aim of providing an answer to the research question.

Since our preferred form of data collection is words as opposed to numbers, we utilised a qualitative research approach in this thesis (Bryman & Bell 2011: 386). Emphasis is thus placed on theory generation and interpretation, rather than theory testing. In a qualitative approach, “concepts and theories are usually inductively arrived at from the data that are collected”; thus, this strategy helps achieve an in-depth understanding of the subject while developing an interpretive understanding of human behaviour (Bryman & Bell, 2011: 406, 16). Moreover, a qualitative research strategy was preferred for the “emphasis on the ways in which individuals interpret their social world” (Bryman & Bell, 2011: 27). McCracken (1988) argues “qualitative research is most useful and powerful when it is used to discover how the respondent sees the world” (21). Thus, a qualitative understanding examines how culture mediates human action through the study of words; without this approach, we can only know “what the numbers tell us” (McCracken, 1988: 21). Utilising qualitative research makes it possible to understand, define, and re-interpret available theory, thereby relating it within the context of our research topic. The purpose of a qualitative method is to explore how individuals make sense of their social world, and consequently

the researcher's duty is to translate these interpretations into a meaningful theory that uncovers reasons for participants' decision making. According to Mortimer (2008: 461), history is a product of human character, imagination, creativity and experiences, meaning the way historians make sense of the social world are dependent on, or influenced by, their own interpretations based on the aforementioned attributes. By investigating the historian's view of the social world through their documentation of history, we can derive an understanding of how the past has been shaped, drawing careful conclusions about whether or not the past can be re-interpreted or rewritten upon a change in personal views and interpretations of the social world over time. Bryman and Bell (2011) assert that "qualitative research tends to view social life in terms of processes", which means there is "often a concern to show how events and patterns unfold over time. As a result, qualitative evidence often conveys a strong sense of change and flux" (404). In our context, this includes "understanding how the past history [...] shapes the present reality" (Bryman & Bell, 2011: 404). In ethnography, which is concerned with "collect[ing] and analys[ing] texts and documents" (Bryman & Bell, 2011: 389), a particular social setting can be explored over a longer time period. Thus, it is possible to observe how "events develop over time", in which the social actors' social system of "values, beliefs, behaviours and so on" plays an important role (Bryman & Bell, 2011: 404). Hence, qualitative research helps discover a historical process, whereby the personal interpretations of multiple authors are taken into consideration.

By gathering knowledge produced from the subjective meanings of social actions, richer descriptions can be found. Qualitative findings tend to entail unique, thick descriptions of the social world that is examined—including cultural detail—and can provide the researcher with "a database for making judgements about the possible transferability of findings to other milieux" (Bryman & Bell, 2011: 398). Transferring these qualitative findings to a wider context, that is, to an encompassing understanding of natural heritage branding, can help form conclusions that might assist in answering the research question. However, it is important to carefully evaluate and transfer qualitative data, because findings are often criticised for being too "impressionistic and subjective" (Bryman & Bell, 2011: 408) and difficult to replicate and generalise (Bryman & Bell, 2011: 408). Some authors claim qualitative findings are not possible to generalise at all (Bryman and Bell, 2011: 408-409). Easterby-Smith, Thorpe and Jackson (2008: 107-108) share this opinion and maintain that qualitative findings create everyday theory instead of academic theory. Therefore, it was vital for us to carefully create a theoretical foundation in this thesis. Moreover, as recommended by Bryman and Bell (2011: 408-409), the findings we gathered throughout our data collection were merely generalised to "theory rather than to populations" (Bryman & Bell, 2011: 408-409) and were rather speculative.

Due to the time limitation of exactly ten weeks, it was only possible to conduct qualitative research based on a cross-sectional design. The research design provides a framework for the collection and analysis of data, whereas the research method acts as a technique for collecting data (Bryman & Bell, 2011: 40-41). Cross-sectional design is defined as the typical blueprint for examining multiple cases “at a single point in time [...] to detect patterns of association” (Bryman & Bell, 2011: 53). As a consequence of the chosen research method of document study, which involves investigating many cases, the cross-sectional research design seemed most appropriate. An additional reason for selecting a cross-sectional design was the necessity of detecting variation (Bryman & Bell, 2011: 54); hence information from several documents should help understand the social phenomenon of rewriting history. Another reason for applying a cross-sectional research design was that data is collected simultaneously (Bryman & Bell, 2011: 54). Ultimately, a cross-sectional design seeks to uncover patterns (Bryman & Bell, 2011: 54), which was compatible with the research’s aim to understand whether underlying themes exist within the study, and whether general conclusions can be made about the handling of collective history.

3.5 Data Collection Method

Since this thesis is primarily occupied with the process of handling and rewriting history, an analysis of documents produced throughout various decades can provide insight into how the ideas of collective history and collective identity are reshaped and altered over time. First, a document study is not defined as a ‘data collection method’, but rather a ‘data selection method’ (Bowen, 2009: 31). We were creative in our approach to sourcing documents, gathering from all avenues and attempting to expand upon the information found within the documents. It is counterproductive to try and produce a standardised recipe for how to collect the documents; rather, the only criterion is that it fits within the boundaries of a document. Thus, from a large sample of documents, only those documents that contained evidence of understanding the notions of the rewriting or reframing of history and myth were selected.

In the article *Document Analysis as a Qualitative Research Method*, Bowen (2009) describes document analysis as a “systematic procedure for reviewing or evaluating documents—both printed and electronic (computer-based and Internet-transmitted) material” (27). Moreover, in the article Bowen refers to Corbin, Strauss and Rapley who advocate that a document analysis requires that “data be examined and interpreted in order to elicit meaning, gain understanding, and develop empirical knowledge” (Corbin & Strauss, 2008; Rapley, 2007 in Bowen, 2009: 27).

Documents are produced by people and for people; thus, they must in many ways reflect the interests and the wants of a group of individuals. The documents that we collected can reflect the broad interests found within the two sports subcultures. Document analysis of public information was executed in this thesis, namely through advertisements, newspaper articles, magazines, books, blogs, photographs, videos, and promotions, to generate an understanding of how each of these documents has attempted to rewrite history. Merriam (1988) pinpoints, “documents of all types can help the researcher uncover meaning, develop understanding, and discover insights relevant to the research problem” (118). Grasping an understanding of historical identity can be reached through a close study of the language and imagery that appears within the documents being analysed. An interesting exploration is to look at the ways in which media documents compete with other documents in framing notions of collective history, perhaps investigating how media intervenes in the writing and rewriting of history and in the branding of the two sports. This investigation will also be applicable in a broader context—divergent stories of the same phenomenon are a point of contention that is relevant to the notion of branding.

Document analysis as a source of data involves documents that are already available in the public sphere and are not produced upon a researcher’s request (Bryman & Bell, 2011: 544). The predominant advantage of a document analysis is that the material is considered non-reactive: since it was produced primarily for reasons other than research, the “possibility of a reactive effect can be largely discounted as a limitation on the validity of data” (Bryman & Bell, 2011: 544). The methodological reasoning for this research method is the necessity of gathering data that has not been affected by the researcher. As the mass media often reflects the interests of society at large and occupies a large space within public opinion, a comparative analysis of media documents versus other documents can provide a reliable source of information about where societal focus lay with regards to the sports umbrella, and whether there are contrasting interpretations of the shared history and myths. Documents can assist in the investigation of our research problem because they “provide background information as well as historical insight. Such information and insight” can help “understand the historical roots of specific issues [namely the historical development process within the sports umbrellas] and can indicate the conditions that impinge upon the phenomena currently under investigation” (Bowen, 2009: 29-30). Furthermore, documents equip us with “a means of tracking change and development” (Bowen, 2009: 30); hence, it is possible to compare drafts of documents, in this case equestrianism and martial arts documents, in order to identify changes, such as indications of changes throughout history (Bowen, 2009: 30). This means, sports will be used as an example of a greater phenomenon in this thesis, namely the organic growth of brand heritage as perpetuated

by multiple authors writing about various sectors of the two sports umbrellas. Later, these findings can help draw conclusions about the notion of brand management and the role of brand managers.

When it comes to shaping public opinion and defining a point of focus, the mass media is highly influential. Yet topics of discussion within the media are also shaped by public interests, as journalists frame their approaches on their subjective interpretation of what readers want to hear and perceived topics of interest. A closer study of the keywords emphasised, the concepts discussed, the vocabulary used, and the interpretive lenses through which the historical events are portrayed can give more than a perfunctory review of the sport in question. Mass media documents are considered materials with meaning because of their function and widespread reach; however, an equally interesting perspective they can offer is through the contrasts that appear when compared to other forms of documents (Bryman & Bell, 2011: 550). Various documents can be examined in relation to other documents in an attempt to uncover a comprehensive reflection of the notion of collective history, and in doing so, broader themes within the differing outlets may emerge (Bryman & Bell, 2011: 552). Both correlations and discrepancies found in a variety of documents can shed light on the varying perceptions about shared sports heritage and identity. The documents used within this study will be approached as artefacts since they are a representation of a culture and can provide insight into the norms, classifications, and beliefs of a society and its collective identity. To ensure validity, multiple sources will be used from myriad channels, while maintaining “considerable awareness of contextual factors” relating to the sports umbrella (Bryman & Bell, 2011: 552).

Bryman and Bell (2011) describe how “documents are windows onto social and organizational realities” (559). This metaphor means that documents can “reveal something about an underlying social reality” (Bryman & Bell, 2011: 559). However, some authors are sceptical about “the extent to which documents can be viewed in this way” (Bryman & Bell, 2011: 559). It has been argued that a document analysis is not always advantageous (Bowen, 2009: 31). According to Bowen (2009), there are three disadvantages to document study: ‘Insufficient detail’, ‘Low retrievability’ and ‘Biased selectivity’. Therefore, the applied research method still requires a careful analysis of all data. Moreover, while the approach cannot completely eliminate inevitable biases that will arise from the researchers’ interpretation of documents, it will produce results that are direct from the consumer, that are produced for means other than business research, and that are organic. To ensure validity, multiple sources should be used from diverse channels, while maintaining “considerable awareness of contextual factors relating to the organization” (Bryman & Bell, 2011: 552). A central point to the effective use of document study is that

documents “need to be recognized for what they are—namely, texts written with distinctive purposes in mind, and not as simply reflecting reality” (Bryman & Bell, 2011: 559). Consequently, we regard documents as an additional source of understanding used in combination with the gathered theory to achieve a holistic view of the situation—in other words, the organic approach to brand heritage and the question of whether re-branding or rewriting of history is controllable or not. The advantages of a document study largely outweigh its limitations, and given the cost-effectiveness and efficiency of a document study, it is the most well suited method for the research question.

3.6 Methods of Data Analysis

This section will explain how we interpret documents qualitatively. It should be noted that a qualitative research approach involves rigorous data collection techniques and full “documentation of the research procedure. Detailed information about how the study was designed and conducted should be provided in the research report” (Bowen, 2009: 29). In this thesis we follow the approach of Bowen (2009), who suggests, “document analysis involves skimming (superficial examination), reading (thorough examination), and interpretation” (32). By investigating the historian’s view of the social world through their documentation of history, we can derive an understanding of how the past has been shaped, drawing careful conclusions about whether the past can be re-interpreted or rewritten upon a change in personal views and interpretations of the social world over time. In our context, this includes “understanding how the past history [...] shapes the present reality” (Bryman & Bell, 2011: 404).

As mentioned previously, hermeneutics is defined as “the understanding or interpretation of texts [...]. It has been influential in the general formulation of interpretivism as an epistemology and is more or less synonymous with Weber’s notion of *Verstehen*” (Bryman & Bell, 2007: 574). The focal point of hermeneutics is to develop an understanding of the meaning of a text from the perspective of its author, and approached as a product of the documenter. According to Bryman and Bell (2007), this will “entail attention to the social and historical context within which the text was produced” (574). Hermeneutics is seen as a “strategy that has potential in relation both to texts as documents and to social actions”, which explains the strategy we applied in our analysis of documents (Bryman & Bell, 2007: 574). We considered written documents as well as electronic documents, within which we focused on the hermeneutic position where language represents “a wide range of commonsense sayings, metaphors, and stories that can provide a meaningful perspective on one’s cultural and personal history” (Thompson et al. 1994: 434). We attempt to understand what is being communicated in the documents through language interpretation, including both verbatim reports as well as reading between the lines. We

do not overlook the “silence, the absence of speaking, the silence of the unspeakable and the silence of being or life itself” (Lavery, 2003: 19), as this can also provide abundant room for interpretation and further analysis. Within our document analysis we also look for symbolic metaphors of various images and events to interpret overlapping viewpoints as well as distinctions and differences. Symbolic metaphors tend to emphasise similarities and patterns within the documents, and can be used to gain a comprehensive understanding of shared identity and meaning.

CHAPTER IV

EQUESTRIANISM ANALYSIS

4 Equestrianism Analysis

In the Analysis of Equestrianism chapter, we present our analysis of the first sports umbrella which includes our interpretation of each document and its meaning within the context of this thesis. First, we provide a historical overview of equestrianism, followed by a close analysis of five documents in total: an advertisement, a film, a newspaper article, a website and a podcast episode. We begin by presenting the document with a brief explanation of what it is and why it was selected, then provide a detailed deconstruction including the various ways in which the narrative told represents a rewriting or reframing of history and myth.

4.1 The Authors' Historical Overview of Equestrianism

In order to understand equestrianism it is necessary to study the development of its traditions and history. A more thorough understanding of the sport and its past will aid in our interpretations of its present day meaning and the significance of the features and essential qualities that make up the activity.

Equestrianism has “gone through many stages in its journey to its current form” (Kenney, 2011). Certainly there is a difference between “the utilitarian use of horses and the use of horses in sport” (Hedenborg & Hedenborg White, 2012: 303); however, equestrian sport “has hitherto not received a great deal of attention from sports historians” (Hedenborg & Hedenborg White, 2012: 303). Thus far, research with respect to equestrianism has predominantly focused on horse racing with other aspects of equestrian sport ignored. (Hedenborg & Hedenborg White, 2012: 303). Furthermore, previous studies on horse racing have touched upon issues “related to social class” (Hedenborg & Hedenborg White, 2012: 303), since equestrianism is primarily considered a prestige sport engaged in by members of the upper-class.

Since their first domestication in 4500 BC by “prehistoric tribesmen in Central Asia” (Bailes & Day, 2001: 211), horses have been used for a variety of purposes. Once utilised for transportation, agricultural work, forestry and cavalry, in the present day horses are associated with hobbies and sports such as hunting, racing, jumping, dressage and leisure (Hedenborg, 2007; Ödberg & Bouissou, 1999). In ancient times, horses were used in the cavalry, the fastest and most effective force an army could own (Hedenborg & Hedenborg White, 2012: 302; Equestrian History, 2012; Nolan, 1860: 1). The horse was considered in Europe to be a “splendid animal, well suited to the purposes of war, and much used in a battle” mainly in “Arabia, Asia Minor, the vast plains of Mesopotamia and Persia” (Nolan, 1860: 1). These Eastern countries were defined as “equestrians” and made “exclusive use of cavalry in their wars” (Nolan, 1860: 1). In pre-

historic Rome, horses were considered valuable and uncommon, thus few had the opportunity to afford and maintain a horse, whereas today, “equestrians can belong to any strata of society although horses are still expensive to buy and keep” (Equestrian History, 2012). As mentioned previously, equestrianism encompasses a wide range of sports, including polo and racing, or eventing, dressage and jumping as Olympic disciplines. (Equestrian History, 2012; London Olympics, 2012). For decades, equestrian sports were regarded as the “activity of the kings and the aristocracy” (Bailes & Day, 2001: 211). Polo, along with attending horse racing events at the track with “mounted thoroughbred horses” (Bailes & Day 2001: 211), remain the most popular of the equestrian sports (Bailes & Day, 2001: 211).

Polo is believed to be the oldest team sport; however, its precise origins are unknown and “shrouded in the mist of history” (Laffaye, 2009: 5). Some version of polo was first played by nomadic warriors over two thousand years ago (Sport Polo, 1996-2011), and according to Chehabi and Guttman (2002), polo likely developed “from rough equestrian games played by the mounted nomadic people of Central Asia, both Iranian and Turkic” (384). Later the sport transformed into the game it is today. Polo was first “introduced by the Parthian dynasty (247 BCE–224 CE), which originated in north-eastern Iran (roughly Khurasan), close to the steppes of Central Asia” (Chehabi & Guttman, 2002: 384-385). Polo was considered a royal sport in ancient Iran since it was a favourite game amongst kings and noblemen. As polo spread from Iran westward, “the sport was very popular among members of the imperial court and the nobility” (Chehabi & Guttman, 2002: 385: 390). Moreover, “in the very early days of polo in England the game enjoyed the patronage of royalty and nobility” (Laffaye, 2009: 136), which continued to reinforce its ties to sovereignty. Today, polo is still associated as a sport of the upper class. The British army discovered the game of polo around 1850, and within their ranks fostered its play. Hence, the game had a solid establishment in England, and by 1859 the first polo clubs were formed there. Polo is played in over fifty countries, and polo events are frequently hosted in England, Argentina and the United States. Polo is “certainly the most exclusive sport to be played with a ball. All over the world, prestige tournaments are held which display the sport of polo at its best” (Polo St. Moritz, n.d.).

Horse racing began with the nomadic tribesmen of Central Asia who were the first to domesticate the horse around 4500 BC. It was believed that they participated in races and competitions were held, and although there is little recorded evidence, “we may safely assume that horse-races were held long before they were recorded in either words or pictures” (Johns, 2006: 52). Racing flourished, and like so many equestrian endeavours, it was considered the sport of kings and queens (Winning Ponies, 2012). Riders improved their skills and equipment through com-

petition, and horse racing continued to gain wide appeal and larger audiences. Horse racing was an original event of the Olympic Games in ancient Greece (Olsen, 2003) and it existed within the realm of myths and sagas, such as the duel between the steeds of the god Odin and his combatant the giant Hrungnir (Daly, 2010: 105). In the present, horse racing is one of the few sports that permit legal gambling and this may contribute to its popularity as a spectator sport in North America, Great Britain, the Middle East, South America, and Australia (Winning Ponies, 2012). The sport continues to have a certain cachet, as many horseracing events enjoy remarkable renown; for example, the Ascot in England of which “few sporting venues [...] can match the rich heritage and history of [the] Ascot Racecourse” (Ascot, n.d.), or the Kentucky Derby in the United States.

How equestrian sports have emerged and changed in its purpose over time will be illustrated in the form of an in-depth study of various documents representing how the history of equestrianism may have been shaped in a contemporary light, drawing conclusions about whether or not the past can be rewritten, and in turn, whether or not the equestrian brand can be re-interpreted or re-branded by multiple authors.

4.2 Document Study of Equestrianism

This section of the thesis will take the reader through the following themes as related to narrative and heritage: supplementary history, mythical history, monarchical history, discordant history, and personalised history. Each unique theme stems from a distinctive author and format: an advertisement, a film, a website, a newspaper article, and a podcast episode.

4.2.1 Supplementary History

There are numerous advertisements that use equestrian attributes to promote luxury products ranging from prestigious fashion apparel to high-end accessories such as handbags, scarves, and watches. The various luxury brands that have been known to incorporate aspects of equestrianism into their advertising—including Gucci, Hermes, Tag Heuer, and Rolex, four brands that appeared most often during research—can all be defined as heritage brands, or at least brands with a heritage (Urde et al., 2007). The print ad featuring equestrianism that was selected for detailed analysis was published in 1976 for the luxury brand and wristwatch producer Rolex (Vintage ad Browser, n.d.). It is unknown where this ad appeared and in what format, but presumably it was first published in a magazine.

The *author* of this document is of commercial nature. This luxury label advertisement promoting a woman’s wristwatch is titled: ‘ROLEX—THE THOROUGHBRED LOOK’, and is targeted at

the wealthy upper class who are drawn to an exclusive, extravagant, regal lifestyle, and who desire timeless luxury brands that offer the potential to fulfil consumers' high expectations. It is a one-page black-and-white print advertisement including both imagery and text. Printing the ad in black-and-white reveals the author's intention to communicate premium quality and elegance, while also resembling photographs from the past prior to the arrival of colour printers, subtly making reference to the historical roots of the brand. An examination of this ad is useful for understanding the different ways a heritage can develop in the context of multiple author participation; in this case, by a commercially oriented author for a separate heritage brand involving a brand manager.

There are many elements within this ad of particular interest. First, the brand name 'Rolex' and the brand symbol of a gold crown are featured in the upper right hand corner. The Rolex brand has a long and meaningful company history; hence it is a brand with a heritage, known for its classic exclusive wristwatches.

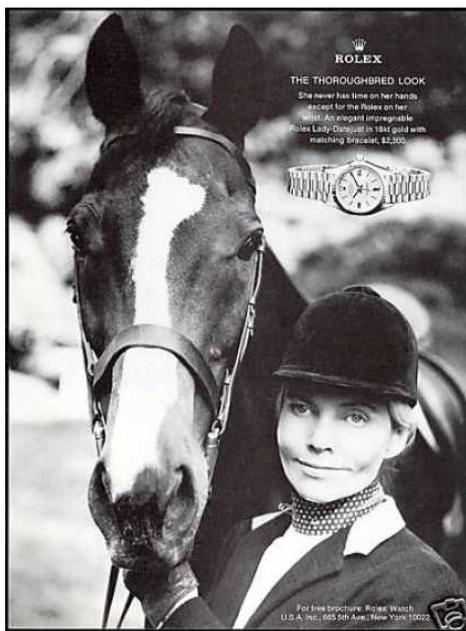


Figure 1: Rolex Watch Advertisement

The brand symbol acts as an indicator of the brand's prestige and the target consumer being amongst the upper class. The symbol of a crown represents the monarchy, thus the Rolex brand has both royal and historical roots. The brand symbol plays up the brand's exclusivity; it is only available to a posh, sovereign clientele.



Figure 2: Rolex Watch Brand Symbol

A second element of interest within this advertisement is the subtitle appearing below the brand.

‘THE THOROUGHBRED LOOK’

The Oxford Dictionary defines ‘thoroughbred’ as a horse “of pure breed, especially of a breed originating from English manes and Arab stallions”, while ‘thoroughbred’ can also be used to describe something “of outstanding quality” or of “first-class” appearance (Oxford Dictionary, 2012). When considering this definition in the context of the Rolex advertisement, emphasis is placed on the pure and exceptional quality of the Rolex watch. Rolex aligns the meaning of thoroughbred, representing pure bloodlines, certain parentage, definite heritage, and undiluted pedigree, with the Rolex brand that offers many of these same qualities. Owning a Rolex watch grants the feeling of nobility through its extraordinary quality and guaranteed, reliable design.

The photograph in the advertisement is a female rider, identified by her equestrian dress code, and a saddled horse standing to her left, held by its halter. The protagonist in the photograph is the woman, with the horse in the role of her supporting character. They are presented in the foreground of the ad, while the background is blurry and indistinguishable. The tight frame of the photograph displays the woman’s head and shoulders and the horse’s head and part of its neck, with the horse’s back melting into the blurry background. The horse is much larger in relation to the rider and the horse’s head appears closer to the camera. While the horse is looking directly at the camera, the rider is not. The rider’s traditional equestrian dress code includes leather gloves and a chic blazer often worn by professional showjumpers and eventers at competitive equestrian events. Her black velvet helmet, together with a polka-dot scarf around her neck, completes the typical equestrian look.

A possible narrative in this photograph is the female rider returning from an equestrian event, perhaps a dressage or jumping competition, and posing for photographs after her successful ride. Her facial expression suggests satisfaction, relief, and possible fatigue. She may be posing for several cameras, as the horse and rider are looking in slightly different directions. The rider’s gaze seems unfocused, while the horse is alert and attentive, eyes wide and ears raised. The text in the ad:

“She never has time on her hands, except for the Rolex on her wrist”

suggests her life is busy and filled with many activities, and perhaps she becomes so caught up in what she is doing that she loses track of time. The Rolex is thus primarily a piece of jewellery; telling time is of secondary importance. Conversely, it may be that the watch is a symbol of reliability for a person with many pressing obligations.

Another narrative within this advertisement and explained through the help of story grammar by Mandler (1984) is a combination of the historical meaning of equestrianism and the Rolex 'gold crown' brand symbol. As mentioned, the author places equestrianism on par with the Rolex brand because the two share similar characteristics such as grace, elegance, precision, and accuracy. These parallels are exemplified through the history of equestrianism and the symbol of the crown, deriving the following narrative from within the ad: 1) The *setting* in this story, presented as the female rider who is a queen, riding her horse (the second character), and wearing the Rolex watch which is a symbol of her nobility. The watch plays the role of the magic artefact, which bestows the queen with power and ability to succeed at her competition. This can be seen as the ad promise, as it suggests that wearing the watch will make the holder more likely to be successful. 2) Within the *development* the story reaches its climax with the performance in which the queen completes her event. She has won, her superiority cannot be disputed, and her distinction is irrefutable. The goal has been obtained and the competition has been vanquished as the result of the queen's effort and flawless precision, which has led to her ultimate accomplishment. 3) The narrative finishes with an *ending*, which also contains a *moral lesson*. The protagonist's (female rider) facial expression indicates satisfaction and suggests a triumph. The moral lesson within the narrative would be a reflection of the major function of the ad, namely the brand's objective of promising the owner success and accomplishment, as well as a feeling of royalty and prosperity delivered by the watch, the magical artefact. Hence, the watch is worth striving for, since obtaining such an item would propel one into a more exalted and triumphant world in which the owner may substitute the role of the queen.

In this advertisement the brand is placed in relation to the sport, as both equestrianism and Rolex have ancient royal roots. Rolex uses equestrian attributes in this advertisement to build brand equity, by selecting a sport with a rich history. The Rolex ad captures the historical essence of equestrianism; for decades equestrian sports were considered a leisure activity of kings and queens. Equestrianism is the sport of legends; by using this imagery, Rolex implies it is the brand of legends with its deep past and heritage. In equestrian sports, excellence derives from perfect timing and the agility of both horse and rider. The author of this advertisement uses features of the equestrian sport such as grace, precision, and accuracy to associate these attributes with the precision and accuracy of the Rolex watch. Thus, the two brands complement one another well. The Rolex advertisement demonstrates how a traditional sport rooted in heritage and known for its historical origins can be used in relation to a product in order to convince a consumer that the advertised item stems from a reliable and trustworthy brand, symbolising long-term prestige. More importantly, this ad illustrates a link between horseback riding and an

exclusive lifestyle through the portrayed connection to a prestigious luxury label. Consequently, this print ad associates the Rolex brand with an enjoyable, regal, leisurely lifestyle activity the consumer aspires to.

4.2.2 Mythical History

While there are many films centred on horses and horse activities, there are fewer films depicting equestrian activities with mythical backgrounds. The movie selected for detailed analysis is *The Black Stallion* from 1979, starring Kelly Reno and the Arabian horse Cass Ole, and produced by Francis Ford Coppola (IMDB, 2012). This particular movie was chosen for a few reasons. First, it is based on Walter Farley's 1941 classic children's novel *The Black Stallion*. This beautiful film depicts an empathic relationship between a young boy and a wild horse, yet this simple human-and-animal bonding story is transformed into something mythical throughout the course of the narrative. The magical moments within the film are enhanced through the film's silence, and its overall lack of dialogue. These long periods of silence leave room for the development of the characters' emotions and the cinematography speaks for itself, as the images are powerful enough to tell a clear narrative without the use of words. The plot of the film contains two narratives. The first narrative is about how the boy and the graceful stallion become friends. The second narrative occurs at the climax of their friendship, when the boy and his horse prepare for an upcoming race. Here, horse racing makes its first appearance in the film.

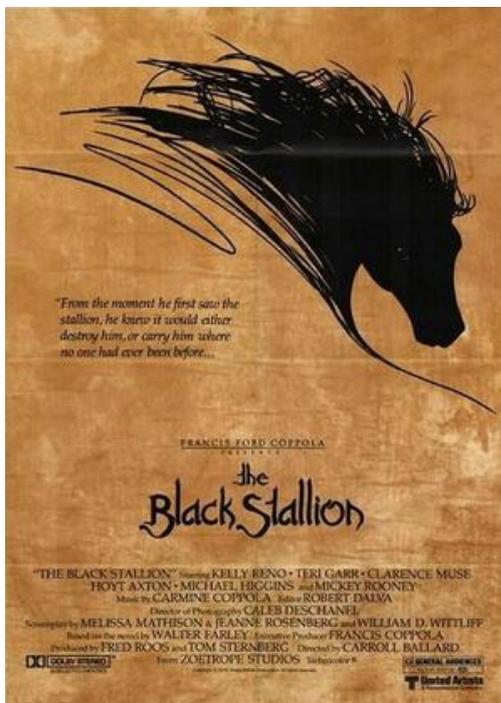


Figure 3: Movie Poster The Black Stallion

The first half of the movie tells the story of Alec Ramsey, a young boy shipwrecked on a deserted island with a wild black Arabian stallion, and who manages to form a close bond with the

horse. The opening scene, set to slow classical music, provokes a mythical atmosphere as the camera scans toward a sand dune. A small black carving of a horse is slowly made visible by the harsh, blowing wind, which the camera zooms in on. The carving represents the wild Arabian black horse. The scene then cuts to a ship passing the northern coast of Africa, which the audience is informed of through a subtitle:

‘OFF THE COAST OF NORTH AFRICA - 1946’

The early scenes, which serve as an introduction to the protagonist and the supporting characters, include a touching moment between father and son when Alec’s father gives Alec a small carving of a black horse—the same carving that was shown in the film’s opening scene.

When Alec’s father hands over the carving, he tells his son:

“I’ll bet this is the most valuable piece here. It’s Bucephalus, the magic horse of Alexander the Great; the biggest and the blackest and the strongest, most beautiful horse”.

His father then tells Alec the story of Alexander the Great, a young boy about the same age as Alec, who claimed he could ride Bucephalus, the horse belonging to his father, King Philip II. Alec’s father recounts Alexander the Great’s strong will:

“He was convinced to be able to ride that horse”.

Describing when Alexander the Great conquered the horse for the first time, Alec’s father says:

“Alexander walked into the arena and saw a big horse waiting there; with fire in his eyes and smoke coming out of his nose”.

The metaphorical description strengthens the narrative within this film, which is rich in history and myth. The film does not provide a flashback to enhance the secondary narrative of Alexander the Great, instead keeping the myth firmly rooted in the larger narrative of the film by remaining present with the central characters throughout the scene. This encourages the viewer to use his imagination in the process, and by using the myth within the film much the same way it is used in reality, a structure to the small society within the film is provided. The audience is left to fantasise about what Bucephalus looked like the same way the characters in the film must imagine the horse. Alec’s father describes the story as if he was present and part of the tale, using rich descriptions and clear imagery, and including small details such as the description of the horse’s eyes. Alec’s father leaves Alec and the viewer to imagine images evoked by his metaphorical description of the horse. The language used by Alec’s father when telling the story is exaggerated, thus increasing the story’s vividness and overall appeal. The mythical aspect the story contains is the saga of Alexander the Great, which is an existing myth outside of the context of the film. The character of Alec’s father adds to the existing myth through his own storytelling techniques and his selection of words to use and elements to emphasise, which falls in

line with Barthes' description of myth, as "language robbery" or "speech stolen and restored" (1984: 11; 9). Munz claims, "true myth yields significant history [...] the elaboration of a historical narrative of *res gestae* depends upon the pre-existence of a myth" (1956: 5). Alec's father elaborates on the pre-existing tale of Alexander the Great in his own words, and through the re-telling of a historical narrative, the film is rooted in a history that exists beyond the boundaries of the movie, enhancing its significance.

A *story-development* can be detected within the narrative told by Alec's father. The beginning *episode* includes the *event* when Alexander the Great first sees Bucephalus and makes the declaration that he can ride him, acting as the *inciting incident* within the story. The plot develops when Alexander the Great, as the protagonist within this small tale, achieves this goal and mounts Bucephalus for the first time, propelling the *rising action* of the story. The *climax* comes when Alexander the Great rides the wild horse away from the crowd. The *dénouement* of the story is Alexander the Great's successful taming of Bucephalus. The object/symbol of the horse carving acts as the starting point in the film, but also occupies a role within the tale. The *lesson* of the story is self-knowledge and firmness of resolve—shown by Alec, but also echoed in the stubbornness of the horse—it is through this quality that leads the young boy (and by extension, the horse, since they share a special bond), to attain high goals. The horse, which possesses some special quality, will not allow himself to be ridden by anyone unworthy. The horse figurine is a central symbol throughout the movie. The legend told by Alec's father resembles the plot of the movie itself, with Alec in the role of Alexander the Great (the protagonist) and the black stallion in the role of Bucephalus (the supporting character, but also the antagonist).

The first turning point of the movie appears in the next scene when Alec wakes up on the shore of an island after a shipwreck. From far away, he recognises the black stallion. When the boy first rides the horse on the beautiful island the viewer slips into reverie and is overcome with heart-warming feelings. The first half of the film is quiet, allowing the music, imagery, and emotions to leave a stronger impression. The viewer is taken to a place where the magic of deep friendship between a human and an animal dominates. At the end of the first half of the film the horse and the boy are rescued and return to the United States, and the horse receives its name, "The Black".

The second half of the film takes place in a small American town when Alec and his stallion begin training for an upcoming race, helping the boy and his horse strengthen their bond, and at this point in the story the audience can instinctively feel the movie will soon reach its climax.

Before they are allowed to participate in the race, Alec and The Black need to prove themselves. The Black's astonishing speed earns him the nickname:

“THE MYSTERY HORSE”.

The wild Arabian horse's new nickname reinforces the film's ties to mystery and myth. When Alec and The Black cross the finish line first, the music, combined with the joyful crowd at the track and Alec's elation at the moment of victory bring a happy resolution to the story. Seconds before they reach the finish line the movie returns to the early scene at the beach, when Alec rides The Black for the first time. The flashback is shown in slow motion to recapture the essence of this key moment and to demonstrate the strong friendship between the boy and his horse. The film ends with Alec holding the small carving in his hands and showing it to The Black, concluding the story with a symbolic element that connects the conclusion with the mythical tale of Alexander the Great.

One of the essential elements and fascinating aspects of the equestrian sport within this movie is the incongruity between the size and strength of the horse and the rider—how a small boy can master an extraordinarily powerful creature like the black stallion. The movie infers that Alec masters the horse because of many qualities—skill, empathy, strength of character, and most importantly the exceptional bond that can exist between a human and an animal. Mastery over an animal, a large animal, is part of the allure of horse riding.

4.2.3 Monarchical History

In order to deliver as broad a range of documents as possible, a website was selected for detailed analysis within this thesis. The website chosen is the 'Guards Polo Club', copyright 2012. The polo club was founded on the 25th of January 1955 with HRH Prince Philip, Duke of Edinburgh, as President and HM The Queen as Patron of the club. The sophisticated has an intricate layout and authentic feel, consisting of only seven pages. The target group seems to be the crème de la crème of the polo sport society. By visiting the 'Contact Us' page a visitor can see the location of the polo club:

“Guards Polo Club Holdings Ltd
Smith's Lawn, Windsor Great Park
Egham, Surrey
TW20 0HP (SAT NAV SL5 0PT)
United Kingdom”

This prestigious address indicates a connection to the British Royal Family since Windsor Great Park is part of Windsor Castle, a palace of Queen Elizabeth. The absence of the address on the homepage suggests a visitor to the website is familiar with the royal roots of the club within the

polo community and is already aware of the historical location. ‘The Club’ page provides information regarding the club’s history, including its ties to the British Royal Family and its position as the leading polo club in the United Kingdom. The club consists of international members, both playing and non-playing, and includes some of the most highly skilled polo players in the world. A narrative appears on the page regarding the polo club’s history, which is set in the natural surroundings of Smith’s Lawn within the Great Park at Windsor. Smith’s Lawn was named after a gamekeeper at the time of the Restoration in the 17th century, and including this information on the webpage highlights the legendary roots of the location.

The website contains many elements related to history and heritage, particularly the history of England and the monarchy, dating back to the Restoration in 1660. Guards Polo Club reflects the strong connection between the past and the present, signifying the past is not a forgotten past, but rather a past that can still provide meaning in the present. The website contains elements of the usage of history and heritage within branding, as it attempts to develop a connection between British history, equestrian history, and the history of this particular polo club.



Figure 4: The Guards Polo Club Symbol

The header for each webpage is the same: a gold crown appears in the centre of a military medal, flanked by the club’s title and containing the colours red, blue, white, and gold. These colours reveal a narrative of mythical and renowned roots. Blue, red, and white represent the national colours of the United Kingdom and appear on the Union Jack, while gold represents splendour and nobility and highlights the club’s link to the monarchy. The colour blue is also known as royal blue, and has been used to describe blue-blooded individuals with a peerage. The crown is surrounded by the Guards Polo Club title, symbolising protection and a defensive barrier, and possibly making a subtle reference to the Queen’s Guard, which acts to protect HM The Queen. The combination of the symbol and the title tell the story of polo’s profound history, which is both traditionally and contemporarily regarded as the sport of royalty. The historical development of polo includes ties to the British Army, who became fascinated with the game after discovering it in approximately 1850. This connection to the British Army is represented by the military medal symbol and the title of the club containing the word ‘Guards’. One may speculate the Queen’s Guard also protects the polo club in this case. Wikipedia claims the

Queen's Guard, also known as the Queen's Life Guard, is composed of soldiers serving in the British Army who have a duty to protect the Queen's official royal residences (Wikipedia, 2012e). The British Army's regiment of Horse Guard represents the horse's historical utilitarian purpose during the war and the Restoration, which may support the popularity of polo as a recreational sport amongst members of the British Army.

The homepage of the Guards Polo Club features a slideshow of sepia photographs, including one image of HM The Queen presenting a trophy to a winning chukka (polo player). The prominence of the Queen's image associates the club with prestige and royal heritage by presenting a strong relationship between the British Monarchy and the sport of polo. Polo appears entrenched in its ancient roots, an attribute the Royal family can easily identify with, and perhaps accounts for Prince Philip's establishment of the Guards Polo Club sixty years ago. The pictures shown in the slideshow are elegant; they are sepia toned and have an edge blur effect, making them appear sophisticated and of high quality. The order of the photographs and the careful selection of a few key photographs within the slideshow tell a story that can relate to history while emphasising the royal attributes of the club. When arriving at the homepage, the first image shows a chukka riding his horse during a game:



Figure 5: Chukka

The picture reflects agility, power, and precision: three qualities a polo player needs in order to master the sport. The next image presents a row of guards in traditional bearskin hats playing trombones:



Figure 6: Guards

The guards are all wearing typical uniforms. The last picture in the slideshow presents HM The Queen bestowing the winner with the trophy:



Figure 7: HM The Queen

The slideshow represents the stages of a polo game, and when viewed in succession can tell a narrative. The first picture represents the beginning of the game, showing the chukka on his horse. The game is supported by background music from the official guard, as presented in the second photograph. The game ends with the winner of the chukka who proudly receives the official trophy on behalf of his team. Traditionally, HM The Queen has the pleasure to present the award to the winner in an official ceremony. The images in the slideshow each speak volumes, and a viewer can connect the pictures to illustrate the story of a one-day polo event. This narrative gives a visitor an idea of what a posh upper class polo event at one of the most prestigious clubs worldwide would be like.

The last photograph with Queen Elizabeth is perhaps from the ceremony at the Cartier Queen's Cup tournament. The website homepage provides information about upcoming events, includ-

ing the Cartier Queen's Cup, from which one can derive that this tournament is one of the most prestigious, since HM The Queen is in attendance at the final ceremony. This particular photograph is displayed on the homepage because it represents a relationship between the monarchy and the tournament, while also establishing a connection between the club symbol, the club title, and the general function of the polo club as the most regal and prestigious polo club in the world.

From 'The Sport' page one can learn about the game of polo, and learn that the most important tournaments occur between May and September. The homepage mentions the most popular tournaments:

- 'Cartier Queen's Cup Final',
- 'Al Habtoor Royal Windsor Cup',
- 'Pommery Archie David Cup Final'
- 'HPA International Day'.

Each of these constitutes a 'big' event—meaning an event with a history. For instance, the Cartier Queen's Cup is a world-class polo tournament dating back to 1960 and attracting the sport's most successful players from across the globe, with the winner receiving a trophy from the Queen. The Al Habtoor Royal Windsor Cup is perhaps the most historical tournament since it dates back to the club's inauguration. A highlight of this event involves a carriage driving procession organised by the British Driving Society (which is another equestrian activity), concluding the tournament with a parade in front of the Royal Box. The tournament descriptions emphasise the enthusiasm the authors feel toward the sport, incorporating words such as 'passion', 'power', 'pageantry', and 'world-class', as well as including words such as 'royal', 'queen' or 'prince' in the titles of the different tournaments to symbolise the ceremonial aspects of polo, which appeals to the thousands of international visitors in attendance. The high membership fee for both players and non-players indicates the sport's prestige, as it is realistically only attainable to the prosperous upper class. The high cost also indicates the club's desirable position as a royal and luxurious polo club targeting the successful elite, which can also be derived from the selection of tournament sponsors, partners, and suppliers, including jewellery brands, high-end fashion labels, polo sport outfitters, successful business corporations, property development investors, interior design agencies, and high quality food and drink catering services, each marketing towards the premium elite class.

GUARDS POLO CLUB

Figure 8: The Guards Polo Club Typeface

The typeface selected for the website offers another interesting point of analysis, particularly the ‘Imprint Shadow’ font used for the ‘Guards Polo Club’ title, which can reveal a narrative. The capitalised typeface and the font size (with the word ‘guards’ appearing larger than the words ‘polo club’) may have significant meaning in respect to the history of the sport and its connection to the British Monarchy. The individual characters are black and capitalised and are further enhanced by the subtle shadow behind, giving the letters an engraved appearance against the sepia and sandy-greyish background colour of the website. Moreover, the moderate serif elements of the letters are not softly curved, instead featuring a slight edgy and sharp appearance, which is especially evident in the ‘G’ character. Yet the gentle curve of the lower stroke on the ‘R’ character softens the harsher details of the other letters. The typeface is medieval and chivalric; conjuring a historical story involving mounted knights and castles. The Imprint Shadow typeface can be described as an old-style serif typeface—sturdy and solid—resembling a modern-day Caslon, yet weightier and with more regularity in its character form. The typeface is popular and widely used in book settings and has influenced many book face designs (Ascender Fonts, 2012). The typeface leaves an elegant impression, which associates the font with the historical meaning of the words printed, while also connecting the words to the military crest symbol beside it. The sepia colour of the website background and the photographs presented in the slideshow resemble old photographs, possibly making a viewer reminisce about images of their ancestors. Moreover, the font colour used for individual webpage titles is rather discrete and blends easily with the background colour, implying the authors’ intention of presenting the website for a posh, noble clientele, avoiding details that could come across as garish.

4.2.4 Discordant History

There are multiple newspaper articles (Beyer, 1991; Finley, 1993; Smiley, 2008; Rhoden, 2008; Squires, 2011; Bogdanich et al., 2012), ranging from 1991 to 2012 dealing with the development of equestrianism in relation to horse racing as an equestrian sport. A major conversation within the aforementioned articles is the question of whether horse racing is still considered an equestrian activity or sport. The selected newspaper article for a detailed analysis is titled: “Mangled Horses, Maimed Jockeys” by Bogdanich, Drape, Miles and Palmer and was published in March 2012 in the New York Times newspaper. Its appearance in a metropolitan daily newspaper,

both online and in print, signals the article is directed at adult readers interested in informing themselves about worldwide current events. This article attempts to generate public interest in a sport beyond its typical audience, and the rhetorical style of writing tries to stimulate feelings of anger within the readers, who prior to reading this article possibly knew little about horse racing. Moreover, being published in a well regarded, popular, daily newspaper strengthens the trustworthiness of the written text, so we may carefully assume the content is considered reliable and applicable in the context of this thesis. The article investigates the American horse racing industry in a critical and unfavourable light, particularly in the state of New Mexico. The long report examines the horse racing business, and concludes with findings that industry practices and “the new economics of horse racing [continue to make] an always-dangerous game even more so, as lax oversight puts animal and rider at risk” (2012: 1).

There are many elements in the article that are of particular interest for the context of our thesis. The article headline: “Mangled Horses, Maimed Jockeys” includes an alliteration to captivate the audience. The article begins with a description of the location where the action takes place.

“RUIDOSO, N.M. — At 2:11 p.m., as two ambulances waited with motors running, 10 horses burst from the starting gate at Ruidoso Downs Race Track 6,900 feet up in New Mexico’s Sacramento Mountains” (2012: 1).

However, more than the location is mentioned here; ambulances waiting to drive to the nearest hospital are also described in this section to inform the reader of what is to come in the following 17 pages.

“DEATH AND DISARRAY AT AMERICA'S RACETRACKS”

-- *Mangled Horses, Maimed Jockeys*

[...]

“Nineteen seconds later, under a brilliant blue sky, a national champion jockey named Jacky Martin lay sprawled in the furrowed dirt just past the finish line, paralyzed, his neck broken in three places. On the ground next to him, his frightened horse, leg broken and chest heaving, was minutes away from being euthanized on the track” (2012: 1).

The title and the first paragraph controversially describe, “under brilliant blue sky”, the national champion jockey Jacky Martin, “sprawled in the furrowed dirt just past the finish line, paralyzed, his neck broken in three places; on the ground next to him, his frightened horse, leg broken and chest heaving, was minutes away from being euthanized on the track”, and by reading these few short lines the reader knows the position of the article (2012: 1). A strong statement language-wise, is the hyperbole: “under brilliant blue sky” (2012: 1), showing the contrast between a nice day, an entertaining atmosphere, and death: on a beautiful day, the horse and

jockey both passed away. By beginning the article with the shocking description of an accident involving both humans and animals, the authors intend to shock the reader by presenting the naked truth regarding what horse racing represents today, namely “death and disarray” (2012: 1). Moreover, it is presumed that Bogdanich, Drape, Miles and Palmer deliberately make use of sarcasm by claiming the ‘prize’ for finishing a race was “being tethered to a respirator” (2012: 1). As in other scenarios described within the article, the authors audaciously disclose their personal opinion regarding the sport.

A photograph at the top of the article illustrates a once beautiful racehorse, now “dumped near an old toilet in a junkyard” (2012: 1) after its euthanization, expressing the heartlessness behind the event.



Figure 9: Photograph of the result of horse racing

The language used to describe the cruel treatment of the horse, words such as “dumped”, “destroyed”, or “shipped to rendering plants and landfills”, emphasise the brutality and carelessness of the human trainers (2012: 1, 14). Moreover, the statement that trainers “pump sore horses full of painkillers to mask injury” (2012: 2) strengthens the reality that horses are still at the mercy of humans’ greed for winning and earning prize money, never caring enough or taking full responsibility for the welfare of the horse, an animal unable to decide the life it pursues.

The authors claim, “On average, 24 horses die each week at racetracks across America. Many are inexpensive horses racing with little regulatory protection in pursuit of bigger and bigger prizes. These deaths often go unexamined, the bodies shipped to rendering plants and landfills rather than to pathologists” (2012: 1). Racehorses like the thoroughbred are ‘created’ to race for monetary sake and must race to the grave, because a thoroughbred is “a genetic mistake. It runs too fast, its frame is too large, and its legs are far too small. As long as mankind demands that it

run at high speeds under stressful conditions, horses will die at racetracks”, claims Finley (1993) in the New York Daily News.

The industry is “still mired in a culture of drugs and lax regulation and a fatal breakdown rate that remains far worse than in most of the world” (2012: 1-2), suggesting previous trials to reveal the truth behind the industry failed. Moreover, while efforts had been made to pilot the development of horse racing back to its origins, these efforts were not strong enough because the “industry group that runs graded stakes races had promised to ban all therapeutic drugs for 2-year-olds, but in late February backed off, saying it did not have enough time to bring state regulators on board [...] one of the most craven acts” (2012: 11). With the establishment of casinos, the number of dead and injured horses “has risen sharply” (2012: 2). The major problem within the industry, particularly in the United States, is lenient regulations allow trainers to illegally drug horses for the benefit of the purse. Once again revealing the equine industry is not what it had once been:

“The Times shows that about 3,600 horses died racing or training at state-regulated tracks over the last three years [counting back from 2012]” (2012: 2).

When studying the language extracted from the context of the article, one could believe it was written about warfare: “slaughter”, “crawl to safety”, “died”, “catastrophic injuries” and “disaster”, are words that also resonate with combat. Furthermore, the injuries and deaths described in the article could lead readers to believe the reality of the sport has nothing in common with general perceptions of the sport, as the depiction of events hauntingly resemble daily traffic accidents: “died in an accident in August 2008”, “heart stopping twice after breaking his femur shoulder and collarbone”, “no pulse en route to the hospital after rupturing his aorta” and “fractured multiple vertebrae in a spill” (2012: 12). These examples of jockey injuries show in excruciating detail how riders can find themselves at the brink of death following a race. The long list of various injuries, one after another, reinforces the point the authors are trying to make: the sport has a dark side that must be illuminated in detail to a mass audience.

When analysed in the context of history, one can see how the authors formulated a present version of the past, thereby developing a contemporary history while taking into account previous events through a present analysis, establishing a recent interpretation of which factors are important. Contemporary history in this context refers to the authors’ creation of a modified picture of the equestrian sport in comparison to the previous image. The authors constructed an outlook on the past shaped by their own imagination, interpretation, creativity, and personal an-

alysis. As mentioned, they occupied a clear stance within the article, criticising the modern version of the equestrian sport, as evident through the discursive practice of strong language use.

By examining the article through Kenneth Burke's pentad dramatist analysis (Czarniawska, 2004: 103), the *act* in the text can be described as: 1) the Ruidoso Downs Race Track is a popular destination for American horse race lovers; 2) however, growing uncertainty exists about whether controversial events at race tracks overshadow the authentic and graceful qualities of the equestrian sport; 3) horse racing needs more regulation. The *scene* is a major American mass media newspaper with global reach, thus the authors have a loud voice amongst readers of this newspaper. By criticising the sport on this platform, the authors can reach a large group of people, which could have tremendous consequences for the future of horse racing. The *agent* of the article is its authors Bogdanich, Drape, Miles and Palmer, with involvement from Walt Bogdanich and Joe Drape. Bogdanich is the investigations editor for the Business and Finance desk and Drape is an award-winning sportswriter, both for the New York Times. The authors' *agency* was an in-depth "computer analysis of data from more than 150,000 races, along with injury reports, drug test results and interviews, shows an industry still mired in a culture of drugs and lax regulation and a fatal breakdown rate that remains far worse than in most of the world" (Bogdanich et al., 2012). The *purpose* of the article is to persuade a general audience to question the intentions of horseracing, as the article can arouse feelings of sadness, outrage, detestation and disgust. The authors manipulate these feelings through their strong language. The question a reader should be led to ask is: 'What happened to human beings and their dignity?' Horse racing seems to have developed into a form of entertainment that is segregated from the original purpose of the equestrian sport. Instead, attention is placed on the fastest, most powerful horse, escalating the use of performance enhancing drugs and ultimately leading to the animal's demise. This sensational carnage damages the regal and noble appeal of horse racing. While the sport can still provide entertainment for spectators, the other side of the medal appears to be a bloody business in respect to the treatment of horses. Consequently, it is possible to argue that equestrianism has developed over decades to something sensational and for the masses, while the real meaning and roots of the sport seem to have been lost. It appears equestrianism is no longer the art of riding; it is the art of turning horses into robots and racing machines. The 3600 dead horses, countless more injured horses, and the dead jockeys over the past three years explains how detrimental this activity is—which perhaps can no longer be called a sport.

4.2.5 Personalised History

From a large pool of audio broadcasts concerning general equestrian activities, the podcast selected for close analysis is 'Equestrian Legends', produced by the Horse Radio Network. The

online radio show offers a total of 21 episodes available for streaming and download and celebrates the lives of men and women from different equestrian disciplines who have had significant careers in the sport and have achieved great success. The podcast, presented by host Chris Stafford, is conducted as an in-depth interview format with a select individual featured in each episode.



Figure 10: Equestrian Legends

The episode selected for detailed analysis is episode 19, published 1 April 2012, and titled:

“Equestrian Legends Episode 19 by Pessoa Saddles - Show Jumper Nelson Pessoa”.

The episode tells the story of the revered Brazilian show jumper Nelson Pessoa, famous for winning the Hamburg Derby seven times and earning him the label ‘the god of horse jumping’. Today, Nelson Pessoa is retired from the sport yet remains in the public eye as a coach, breeder, and founder/owner of the renowned Pessoa Brand that produces saddles and other equestrian equipment. The sixty-four minute in-depth interview tells the story of a child growing up in Brazil and discovering his love of horses and his passion for riding through the inspiring and motivating example of his father, as well as presenting an overview of the sport of show jumping.

The podcast begins with the sound of fast hoof beats, followed by the standard foreword:

“This is the horse radio network.”

The host Chris Stafford then introduces her guest Nelson Pessoa through a lengthy detailed monologue of Pessoa’s life, beginning with his childhood fear of horses, which he overcame to pursue a career in riding. Pessoa eventually became “one of the first Brazilian civilian riders [to practice] the sport that had until that period been dominated by the military”, and through the host’s introduction the listener learns of Pessoa’s remarkable achievements. Stafford describes Pessoa’s natural instinct with horses and his profound understanding as a horseman, which combined with his skills as a rider and competitor earned him worldwide respect. Stafford’s strong emphasis on Pessoa’s intrinsic skills sound as if she is describing a ‘horse whisperer’, and she stresses the important role the show jumper occupies in the equestrian world. Nelson Pessoa as described in the podcast seems memorialised and glamorous, and the tone throughout is one of admiration and celebration. Stafford then speaks of Pessoa’s son, also a successful show jumper, indicating that through the son, the legend of Pessoa lives on. This reference also ties a historical narrative to a modern one, fusing the past with the present and future. Pessoa’s son is coached and trained by his father, the legend himself. Stafford says, Pessoa’s “skills as a coach

are evident in the success of his son Rodrigo”. With this an important narrative is introduced in the example of the present-day father and son relationship, which is simultaneously connected to the narrative concerning Nelson Pessoa and *his* father, and the critical role he occupied in Nelson Pessoa’s own personal history. The story is rooted in multi-generational family traditions, highlighting inheritance, shared familial values, and the importance of guiding future generations.

Following this historical narrative the interview commences, and Pessoa’s past shifts to the present with conversation concerning Pessoa’s current life. Pessoa discusses his work, saying that although he has stopped competing, he never left the equestrian world behind. He discusses his role as a coach, and says his guiding principle behind the teaching of his son is based on his experience with his own father. By assuming the role of coach, Pessoa passes on his equestrian expertise to future champions in the show jumping world. His current life also involves working for his eponymous company, which originally manufactured saddles sold by the luxury designer house Hermés, and are produced in Argentina. The host claims “the brand of Pessoa is legendary around the world”, a reputation that is founded on the brand’s connection with a high-level of competition and Pessoa’s successful career within it. Pessoa’s personal brand as a proclaimed competitive rider and his recognisable name is used to further enhance the Pessoa brand of saddles. With Nelson Pessoa as founder and creator, the ‘Pessoa saddle’ acquires greater prestige and status, and becomes emblematic of the man himself. In the course of the interview, the Pessoa ‘contact saddle’ is deemed a necessity for a committed equestrian and spoken of as a masterpiece. The interview candidly becomes an opportunity for product placement.

The host now enquires about Pessoa’s childhood and his introduction to the world of riding. He describes his childhood as delightful and exciting, and pays tribute to his father for his early support as he discusses his first attempts as an amateur rider in Brazil. His increasing commitment to horseback riding seems almost mythical in the story: a seven year old boy learns to ride with the help of his father, and after overcoming his ambivalence, he develops a love for horses and a passion for riding—the foundation for a legendary career. The speed with which he develops a close connection to his horse seems magical, and his remarkable success in competitive riding underlies the grandeur behind the narrative. Pessoa describes the moments in his life that he sees as historic milestones, choosing the most interesting aspects while always placing himself in a heroic light. Through the interview an image of Pessoa begins to emerge of a masterful, satisfied icon supremely confident within his world. Although it is an audio broadcast, the listener can imagine how Pessoa looks: an older man with a trim figure and a satisfied facial ex-

pression, perhaps even a smile as he relates his life's triumphs. His long monologues about his career display his love for storytelling.

The next section of the interview concerns Pessoa's role models, who include top riders from the fifties, the Chilean, Argentinean, and American equestrian teams, the five-time Olympic gold medallist show jumper Hans Günter Winkler, and the German dressage rider Rosemarie Springer. Once again Pessoa mentions his father, describing how he told him to carefully observe the heroes of the sport as a way to improve his own riding skills. He credits his father for influencing him throughout his personal training, teaching him to develop a precise gaze to observe the correct techniques to employ in his riding. Thus, Pessoa takes his place among a pantheon of legendary riders from many countries.

While talking about his horses, Pessoa states that he is "the king of the horses". He claims he can make any horse jump and win because of the strong connection between the horse and himself and his intrinsic understanding of the horse's personality. To back up this claim, Pessoa reprises his long list of riding accomplishments. He refers to the horse as his partner and acknowledges the horse's contribution to his winning formula. Pessoa mentions taming and training wild horses and subsequently riding them competitively, emphasizing the need for patience and persistence to succeed. His voice is enthusiastic and he becomes louder and more animated as the interview progresses, making it more difficult for Stafford to interject questions. His passion for his sport is irrepressible and his eagerness to share his accomplishments is unquenchable. His tone and words are proud. He has cast himself as the hero of his own story.

As to the question of how he would like to be remembered, Pessoa responds "as a horseman" instead of a sportsman, and he differentiates between the two by emphasizing his absolute love for the horse. He claims to have less interest in the competitive side of the sport and to be more engaged with the building of trust and understanding between himself and the animal, the training and the preparation of the horse which only then leads to the final component of the process, the successful ride of the show jumper and the horse. The outcome of the ride is less rewarding than the difficult challenge of preparing the horse for the event.

The podcast contains so many elements of narrative that it is a veritable smorgasbord. The young boy, overcoming fear and self doubt to gain mastery, while being mentored by a father of strong motivation and support, who patiently instils in his son his life's lessons, so that he may carry the mantle of a family's proud heritage. Nelson Pessoa, however, is more than a skilful show jumper, since the podcast develops a further nuance to the tale: he has a magical ability to

intuit and communicate with his horse which seems to provide him with a super-human quality that mere humans lack. Hence, his victory seems ordained, further embellishing his dazzling self-regard.

4.3 Chapter Summary

While five were chosen for comprehensive analysis, a myriad of documents from various decades, authors, and mediums were studied within equestrianism. From this comprehensive sample one can conclude that equestrianism has “gone through many stages in its journey to its current form” (Kenney, 2011). The equestrian sport has emerged and altered in its purpose over time, as demonstrated by the analysis, and representing how the history of equestrianism has been shaped in a contemporary light through multiple author involvement. We can infer that history and myth play a prominent role in the communication and participation surrounding specific activities under the equestrianism sports umbrella. Equestrianism seems entrenched in its heritage as various authors reflect on its history and myth in different contexts; while some authors promote and praise the history of equestrianism; others seek to overwrite equestrian history, sending contradictory messages.

CHAPTER V

MARTIAL ARTS ANALYSIS

5 Martial Arts Analysis

In the Analysis of Martial Arts chapter, we present our findings of the second sports umbrella which includes our interpretation of each document and its meaning within the context of this thesis. First, we provide a historical overview of martial arts, followed by a close analysis of five documents in total: an advertisement, a film, a website, a newspaper article, and a podcast episode. We begin by presenting the document with a brief explanation of what it is and why it was selected, then provide a detailed deconstruction including the various ways in which the narrative told represents a rewriting or reframing of history and myth.

5.1 The Authors' Historical Overview of Martial Arts

The Shaolin Temple in Henan Province, China, is widely accepted to be the origin of martial arts (Shahar, 2001: 359). However, available information is insufficient to provide us with a specific time when the Shaolin monks started practicing the art of fighting (Shahar, 2001: 407). The earliest recorded evidence of combat is from the Tang period, when Shaolin monks engaged in fighting on two occasions: once to defend against bandits, and on another occasion to support the future emperor in his campaign for the throne (Shahar, 2001: 362). Yet despite these two documented battles, there is no evidence to support martial training taking place at the temple or whether these two combats were trained for elsewhere (Shahar, 2001: 363). Further investigation into the “history of monastic fighting is confronted by the reluctance of Buddhist authors to record it” (Shahar, 2008: 4).

Over the next seven centuries there is little mention of the Shaolin monks and any engagement in martial arts; however by the sixteenth century, military experts began travelling to the temple to observe fighting techniques, specifically the specialised art of staff fighting (Shahar, 2001: 364). In 1560, military expert Yu Dayou travelled to the Shaolin temple to study “the monastic fighting technique”, but was profoundly disappointed in their abilities and took on the role of training the monks, as he wrote in his manual: “I realized that the monastery had already lost the ancient secrets of the art, and I openly told them so” (Shahar, 2001: 375). Late-Ming military experts began journeying to the Shaolin temple “to study, teach, or test their strength against worthy rivals. However, the cultivation of professional skills is hard to separate from financial considerations” as experts could benefit financially through providing lessons or through “public performances paid for by spectators” (Shahar, 2001: 379). During this time, documents about the temple increased significantly and there was a “sudden interest in monastic fighting”, which may be, in part, conducive to the “decline of the regular Ming army” and the favourable view of Shaolin practice by the Ming government (Shahar, 2001: 380-381, 386). The Shaolin monks were not universally well received, and were condemned by some for their violation of

Buddhist dietary restrictions and their lifestyle, which revolved around “drinking, eating, and fighting” (Shahar, 2001: 387).

The geographic location of the Shaolin Monastery in Henan Province also plays a contributing factor: martial arts became an “integral element of rural society” as the region was poor and villagers took to practicing forms of fighting to raid the crops of others, or to protect their crops against raids (Shahar, 2001: 389). Yet Chinese military experts have “allude[d] to the supernatural provenance of the Shaolin martial arts”, claiming the pivotal role the Shaolin Temple plays in the origins of martial arts might be over-exaggerated; “Shaolin was not the only monastery where the martial arts were practiced”, but its location in the violent region of central Henan province might explain its heightened importance as military training was integrated “into the fabric of Henan society [...] explaining in part the province’s contribution to the late-imperial martial arts” (Shahar, 2001: 395, 407).

The role of the Shaolin Temple in the history of martial arts has been criticised by China-focused historians, who believe Chinese martial arts are little understood and “too often wrongly associated outside of China with mystic, martial monks in their mountain monasteries, and called by the none too descriptive term ‘Kung Fu’” (Henning, 1981: 173). The various forms of martial arts attributed to the Shaolin Monastery include “archery, wrestling, weapons techniques, and probably [shadow] boxing” (Henning, 1981: 173). The monastery residents earned the title ‘Shaolin Monk-Soldiers’ as a “result of two widely accepted, deeply ingrained, and hard to quash myths” that have led to a widespread misunderstanding of Chinese martial arts history: one being the groundless myth about Bodhidharma the Indian monk who was said to have practiced boxing at the famous monastery around 525 A.D., and the other being the story of “the mythical Taoist hermit Zhang Sanfeng” who was credited with the origins of Chinese shadow boxing (Henning, 1981: 175, 173). By the mid-Qing period, “boxing manuals began to refer to Shaolin Monastery as Chinese boxing’s place of origin” (Henning, 1981: 176). An unknown author published a book titled *Secrets of Shaolin Boxing* in 1915, “which wove together all these groundless stories” (Henning, 1981: 176). While historians exposed the “book’s lack of historicity”, it still “became popularly accepted as a key source for Chinese martial arts history enthusiasts, and its pernicious influence has permeated literature on the subject to this day”; thus, “Chinese martial arts entered the twentieth century cloaked in their mantle of myth” (Henning, 1981: 176).

Today the practice of martial arts has spread all over the globe. The value martial arts offers in Western society is a “source of somatic knowledge” that comes within a “fashionable com-

modity of the rising sport market within consumer culture” (JeongMyung: 1998, 11). The pursuit of martial arts has largely transformed into a source of monetary gain, as the practice has become more superficial in its widespread growth and its shift to a more business-centric approach (JeongMyung: 1998, 11). The rise in popularity of martial arts within the United States can be attributed to both the Vietnam War and subsequent American military presence in the region (JeongMyung: 1998, 12). As many as one in ten Americans have experienced some form of training in martial arts (Yang, 1996), and by 1995 karate had morphed into a 1.5 billion dollar industry (Ferguson, 1995), thus an increased number of successful practitioners have become entrepreneurs by opening their own dojos (JeongMyung: 1998, 13). This modernization has resulted in fundamental changes within the sport in an attempt to better fit the tastes of Westerners, such as a reduction of Eastern formalities (rituals and etiquettes), or alternatively a heightened importance given to these formalities, not “because they think it is the core of the arts, but because they believe they can sell the commodities more effectively in the rising new-age market in which the tradition is married with the modern, the East with the West” (JeongMyung: 1998, 12, 11). The monetisation of the sport has led to larger associations and an increase in the number of tournaments offered, both a way to increase financial earnings and gain further international recognition (JeongMyung: 1998, 13). A continual evolution from traditional to modern has occurred: transforming the “pursuit of enlightenment through self-awareness” to the “search for excellence in terms of competition”; redefining the body image of “wise and old expert” to “strong and young athlete” (JeongMyung: 1998, 14). The essence of spirituality, formerly an important characteristic of martial arts, has been dramatically reduced in modern times, and “the traditional relationship between teacher and student, which used to be compatible with that of father and son, has been [...] turned into relations of producer and consumer” (JeongMyung: 1998, 14). Older and more traditional martial artists may believe “consumer culture has distorted their practices and eroded their essential nature”, as the pedagogical atmosphere that was once so vital to the sport has been missed in consumer culture (JeongMyung: 1998, 11, 15).

5.2 Document Study of Martial Arts

This section of the thesis will take the reader through the following themes as related to narrative and heritage: fantasy history, popularised history, communal history, inharmonious history, and glamourized history. Each unique theme stems from a distinctive author and format: an advertisement, a film, a website, a newspaper article, and a podcast episode.

fight – or disappear.” A man in a suit appears in the first half of the thought bubble and is approached by two men with weapons. In the second half of the thought bubble, the two men are in combat and the man in the suit is departing the scene quickly, as his tie has flown over his shoulder. The image most likely shows the techniques in action. While the ad is presumably targeted at a young male, the figures in the drawing are older men. The man in the situation who is under attack is wearing a suit, possibly implying that he was caught off guard by the attack, yet still prepared for it.

The text portion of the ad begins with the sentence: “NINJA were the men who passed anywhere at will, had the power to overcome every martial art, and were masters of invisibility.” This broad yet vague description of ninja uses martial arts as one of the key selling points, yet does not go into detail about what martial arts is, or what forms of martial arts it includes. The notion of overcoming all martial arts implies that martial arts is a skill-set one can learn and conquer. The advertisement assumes the reader is familiar with the notion of martial arts, and uses it skilfully as a selling point without highlighting any key features of martial arts. The ad goes on to suggest that by reading the book, one can learn the theory behind “even the most closely guarded of all NINJA SECRETS, The Art of Invisibility.” The words in the text the ad capitalizes are particularly interesting. The first word, *ninja*, appears in capitals, then later the term *ninja secrets* also appears in capitals. The emphasis on these words suggests this is a major attribute of the book, and the ad wishes to draw attention to the mysterious and undisclosed aspects of being a ninja. The “Art of Invisibility” has the first letters of the two key words capitalized, meaning this is considered a term of importance as well, though not as paramount as the words “*ninja*” and “*secrets*”.

The larger portion of the text is broken down into sections: the first section telling the reader what they can now learn after purchasing the book. This section has highlighted through capitalization the words “*samurai*”, “*ninjutsu*”, and “*ninja*”. The term “Oriental Martial Arts” also features capitalized first letters of each word. What is interesting about this section of the text is the past tense in which it is written: “Now you can learn their skills, which were unsurpassed, even by the deadly SAMURAI”, the ad announces. The phrasing of this sentence implies these skills are no longer in use, as they “were unsurpassed”, rather than “are unsurpassed”. Again this section mentions how the techniques the book shares have been the “most closely guarded”, and “were passed down from father to son in NINJA families who lived in remote parts of ancient Japan.” This is the first reference in the ad to a specific geographic location, previously being referred to as the vague “Orient”. The inclusion of the word *ancient* used to describe Japan also hints that the techniques in the book are no longer in practice. The refer-

ence to families, and the passing down between male ninja members from older to younger generations, again alludes to the secrecy of the techniques and how families, through multiple generations, protected them. This is reinforced in the last sentence of this section, which claims the “secret techniques [...] were so closely guarded that the penalty for revealing them was a gruesome death.” The past tense symbolizes history, the threat of death symbolizes danger, and the closely guarded techniques symbolize old secrets that have not been revealed for a long time.

The middle section of the text describes the techniques shared within the book. The sub-title is:

“NINJUTSU IS UNBEATABLE... Better than JUDO, Quicker than KARATE, more Efficient than KUNG-FU!”

Here it is revealed that the book is offering a separate sub-genre of martial arts that is perhaps not familiar to the reader. In order to describe the new sub-genre, the ad must make comparisons to forms of martial arts that are familiar to the reader. The text then provides a brief summary of who the ninjas were:

“NINJA were the deadliest fighters who were unbeatable in unarmed combat. They mastered an incredible array of weapons and could kill with their **Stars of Death**, or their deadly **Retrievable Stone**”

Here the ad provides its own historical interpretation of the ninjutsu form of martial arts and the ancient practitioners of said martial art. The language used attempts to highlight both feelings of fear and strength from within the reader, emphasising the deadly traits of the fighter, while simultaneously suggesting that the reader too can obtain the deadly traits. The ad goes on to further describe the ninjas:

“These fighters were unsurpassed in their ability to overcome all of their enemies. They employed magic and stealth, could utilize everything around them as weapons, knew the secrets of invisibility and combined physical, mental and emotional techniques against their antagonists in an all powerful system of self-defence.”

The choice of the word antagonist is unusual, as antagonist is frequently used in the context of storytelling, but not so frequently used in the context of real life situations. This word enhances the fictional elements of the text.

A separate text box in the lower left-hand corner of the ad with the title: “ATTENTION LAW ENFORCEMENT AGENCIES” reads: “Because of the nature of the techniques revealed in the training manual, we feel it is important to make this manual available to Law Enforcement Agencies throughout the world. Please write for discounted prices on your official letterhead.” This is an additional selling technique within the ad from a different perspective. Since the ad

targets young boys, this feature may have been included to highlight the thrill of knowing techniques that worldwide law enforcement agencies need to be warned about.

 Cash, Check Money Order. (Add 60¢ for postage and handling).', 'ADD SALES TAX.', 'TOTAL \$ _____', 'NAME _____', 'ADDRESS _____', 'CITY _____ STATE _____', 'SORRY, NO C.O.D.'S ZIP _____'."/>

MAIL TODAY
G. P. EXPORTS, Dept. RS-1305
380 Madison Ave., New York, N.Y. 10017
RUSH me THE SECRETS OF NINJUTSU. I'll be completely satisfied . . . or I'll return the manual within thirty days for a refund of the purchase price with no questions asked. I promise to use the deadly SECRETS OF NINJUTSU only for defense and that I'll never use it as an aggressor.
I enclose \$5 in Cash, Check Money Order. (Add 60¢ for postage and handling).
ADD SALES TAX.
TOTAL \$ _____
NAME _____
ADDRESS _____
CITY _____ STATE _____
SORRY, NO C.O.D.'S ZIP _____

Figure 12: Close-up of 'Mail Today' Box

The ad concludes with a cut out “mail today” box to mail to 380 Madison Avenue in New York with five dollars and sixty cents for a copy of the book and the extra bonuses the package offers. The cut out box includes the statement:

“I promise to use the deadly SECRETS OF NINJUTSU only for defence and that I'll never use it as an aggressor.”

This final remark once again refers to the deadly nature of the secret techniques shared within. It also relates to the concept of honour, as the signing of an oath is a critical matter that is emphasised through the serious language used and the tone conveyed by the author. Another reason this advertisement is targeted at a younger consumer is the mailing address to Madison Avenue, which would immediately raise concerns for a sceptical older consumer who would recognise this address as standing for something other than confidential martial arts practices.

There are two narratives that appear within this advertisement. The first is a mythical, historical narrative, involving a father and son with a close relationship living in ancient Japan, the father educating his son from a young age in the same way he was taught by his father, and the same way his father was taught by his grandfather, and so on. It is a story of close family ties and strong relationships, as well as common interests (martial arts) that strengthens the bond between the two. It is a story of growing up and coming of age, the process a boy goes through to become a man. It is also about protecting your family and your belongings from your enemies, and working together to develop techniques that are unsurpassed by those who threaten your well-being. The second narrative is a current one, an exploratory discourse where the reader occupies the lead role. The reader is thrown into the story of the text as the protagonist, learning lethal martial arts techniques that no one else is familiar with, and ultimately preparing the reader for the unexpected day when he will be attacked. The reader's identity is also constructed through the text, as the reader is unfamiliar with the story until it is introduced through the ad.

Thus, the story successfully creates a need within the reader of the ad, who identifies with the story told and ultimately wants to fulfil the story outcome and conclude the narrative.

This story, with its over-the-top extravagant events and large promises, is perfectly suited for a young male, the likely reader of a comic book. When reading this narrative involving an exotic and unfamiliar history, which the ad promises to make familiar and accessible, a young male reader is drawn to both the connection to the past in a distant location, the connection this story has to him and how he can become directly involved, as well as the highlighted elements of danger and risk. Ultimately, the truth of the history told (in this case, it is more appropriately considered a myth as the time frame is vague) is of little importance to both the reader and author of the ad. The advertisement uses general historical references that refer to an unidentified family, in an unidentified part of Japan, during an unidentified time frame, yet the vague and uncertain historical elements are still important enough in the story of martial arts that they are included in this ad.

5.2.2 Popularised History

While there are numerous films from various regions depicting many different styles of martial arts, the movie selected for detailed analysis is *The Shaolin Temple* from 1982 starring Jet Li, and produced by the Chung Yuen Motion Picture Company and Zhongyuan Films in China. This film was chosen over others for a few reasons. This was the first major kung fu movie produced in China, and it was also Jet Li's debut film, who since went on to become a well-known actor starring in both Chinese and Hollywood productions (IMDB, 2012). The film also cast martial arts students as opposed to actors in the roles of the Shaolin monks, demonstrating that kung fu skill was considered more important than acting experience. The film has also been distributed widely by fans in both China and western countries such as the United States, and is the first film in a three-part series (all starring Jet Li) about the Shaolin Temple. The movie was viewed in Mandarin Chinese with English subtitles; any quotes from the movie are thus referring to the subtitles and not the original spoken words.



Figure 13: The Shaolin Temple Movie Cover

One of the most relevant aspects of the movie in the context of this thesis is the opening scene, which captures men riding horseback across a barren landscape. The clip is set to upbeat music with lyrics about the Shaolin temple:

“Shao Lin, Shao Lin. How many heroes adore you. Shao Lin, Shao Lin. How many wonderful stories mentioned you. Your martial art is the only one in the world. The Shao Lin Temple is famous everywhere. Its history last forever. The Shao Lin Temple is splendid. The thousand years’ old temple, the mystic place, the valley of Song Shan, every people dreams of, the original place of martial art, the charming place, is well-known in everywhere, and will be praised forever.” (sic).

The scene then cuts to an empty shot of the entrance to the Shaolin Temple, basked in sunlight, for approximately four seconds as the song concludes with the repetition of the temple name until fade-out. Five subsequent shots of the temple are then quickly shown in succession, including the sign above the temple entrance, and various statues that adorn the temple. As the song fades out, the slow beating of a temple bell fills the silence as the movie commences. The introductory song, which pays homage to the temple’s history, rich heritage, and international fame, serves as a reminder to the audience of the monastery’s role in the development of martial arts. This frames the film in the context of true historical events, while aggrandising the role of the Shaolin Temple by claiming Shaolin martial arts is the only martial arts in the world, and everybody dreams about the original place of martial arts. When the song concludes with the statement that the temple will be praised forever, it is assuming the importance of the temple and its historical role will continue on in the foreseeable future. The quiet shots taken of various locations in the temple serve to reinforce the lyrics in the song. By displaying scenes of the ac-

tual temple that someone could see if visiting in-person, the clips strengthen the relationship between real-life and the narrative told in the film.

This introduction precedes any dialogue within the film, as well as any images that feature the monks. The first scene in which the monks appear is immediately after the introduction, as they crouch in rows praying, filling a large room. The first clip of the monks does not contain martial arts training, but rather introduces the role of Buddhism in the monks' lifestyle. The Shaolin Temple is presented first and foremost as a place of worship—everything else, including kung fu, falls secondary to faith. The conflict between Buddhism and kung fu is touched upon throughout the duration of the film, as the main character finds himself at odds between abiding by the ten laws of Buddhism and his insatiable urge to avenge the murder of his father. At the beginning of the film, the protagonist is asked by his master whether he can promise, “thou shall not kill”, and he is unable to. The discrepancy between the Shaolin Temple and other places of Buddhist worship also extends to the dietary and drinking habits of the monks in the film, which is consistent with real stories that are shared about the Shaolin Temple monks and how they differed from typical monks. When the protagonist is caught by his master late one evening as he is eating a dog he killed, his master does not get angry, instead commenting: “This is usually cook with ginger, wolfberry’s fruit... But it is my first time see this way of cooking” (sic). When the protagonist then offers his master some of the “rich food” and persuades him that he needs to eat because he is tired, his master responds, “As a Buddhist, it’s guilty even to think of it. It’s hard to enjoy such good food”, but then accepts the offer. When more monks come to the scene, the master offers them some of the meat, and when questioned whether they were “breaking the law”, the master concludes: “with Buddha in your heart, wine and meat are nothing.” In this scene, the master quickly abandons his values as a monk and gives in to temptation, thereby guiding other monks to follow suit and break the rules as well. His internal deliberation over the decision does not last long, and none of the monks appear to show any signs of guilt or regret over their wrongdoing. The statement the master makes about having Buddha in your heart seems like an adequate justification for the group, and the rule against consuming meat is not mentioned again. Later in the film the protagonist uses this statement as a point of reference when he breaks the dietary restrictions yet again. While the controversial dietary habits of the Shaolin monks are perhaps considered a factual yet less significant detail of the temple, the movie does not overlook this characteristic and instead makes reference to it on more than one occasion throughout the film. The role of Buddhism presents an interesting dichotomy throughout the film between religion and martial arts, between fighting as a positive or a negative, and between morals and the urge to kill. Buddhism also provides another source of

rich history in the story—the history of the Buddhist religion becomes closely intertwined with the history of kung fu in the film.

When the General attacks the temple near the end of the film, the temple abbot argues: “This is a historical land. If there’s a crime, it should not involve the temple. And the punishment shouldn’t extend to the monks.” The historical importance of the temple is touched upon throughout the film, often presented in relation to Buddhism, rather than its role in the establishment of martial arts. The religious aspects make the temple what it is and give it historical relevance in the movie. The temple is an interesting landscape, as the abbot in the film considers it a peaceful place, yet the main activity that occurs at the temple—the martial arts training—is founded upon a lack of peace. This adds to the overall conflict the protagonist faces throughout the narrative, which is his personal battle between living the life of a peaceful monk and abiding by the ten laws, or choosing to abandon these values and use his martial arts skill to kill the man who murdered his father.

The concluding sentence in the plot summary on the back of the DVD case claims: “Based on a true story from Shaolin folklore.” The movie incorporates the two major ‘myths’ about the Shaolin Temple into its plot—the first is the story of the monks defending the temple against outlaws, and the second is the story of the monks supporting the future emperor to the throne. In the film the two events are merged into one, and the protagonist plays a critical role in this constructed narrative. The monks must defend the temple against an invasion by the antagonist, a general who unlawfully claimed the emperor title through violence and brutal force, and who also killed the protagonist’s father. This raid of the temple and the battle that ensued helped the rightful emperor regain his throne, thus the monks were generously rewarded at the film’s conclusion:

“To show appreciation, King Li of T’ang Dynasty awarded the Shao Lin monks many fortunes. The monks only accepted a gown for each, a tea set, and forty acres of land. The king permitted Shao Lin to form a defence force. Such legend was recorded on a temple stone with the royal signature of King Li Shih-Min. The martial art of Shao Lin began to prevail. The fame of Shao Lin kung-fu was everlasting.”

This is the first appearance of a third-person omniscient narrator in the film, excluding the narration that appeared in the form of song lyrics at the beginning, providing a very broad summation of the events that followed the film’s conclusion. This method of wrapping up a film is most frequently incorporated into those based on a true story. While the film’s protagonist is a fictional character, a real historical character is also in the film, King Li of Tang Dynasty, and by mentioning his name and title in the conclusion the narrator emphasises the truth behind the

story from Shaolin folklore that has been told. When the narrator mentions the temple stone, a close up shot of the stone is shown, concluding the film in much the same way as it began, by grounding the narrative in reality. The value of a myth is the collective identity it helps define, which when shared between generations helps develop a more profound meaning within society. A myth encourages conversation, so by strongly incorporating traditional martial arts myths into the movie narrative, discussion surrounding the Shaolin Temple and its heritage is heightened. This conversation helps strengthen the tie martial arts practitioners have to the sport, while clarifying the role martial arts plays in their lives.

5.2.3 Communal History

In order to gain as wide a scope as possible with our document analysis, a website was selected since the format differs from that of a standard print advertisement or article, thus presenting another category for interpretation within this thesis. The website chosen for closer analysis is 'Legend Shotokan Karate', copyright 2007. It is a simple website for a small Shotokan karate school, with a basic layout containing seven pages. The school location is written as only the street address, assuming visitors to the website are already aware of the school and know in which city it resides. A quick map search shows the school is located in Staten Island, New York. The absence of a full address for the school represents a void—the address is less vital than other features on the website that have been included.

The header for each webpage is the same: a coloured photograph of a magnolia tree is to the left, the translucent, animated petals floating across the screen, while a black-and-white drawing of an individual wearing a gi is crouched underneath the tree, head lowered. The title contains Japanese characters as well as the English words "Legend Shotokan Karate". The word *legend* is the largest on the page and is also italicised, signifying that this word is deemed more important than both Shotokan and karate. A dictionary definition of 'legend' is "a traditional story sometimes popularly regarded as historical but unauthenticated" (Oxford Dictionary, 2012), thus it is closely related to popular interpretations of the word 'myth'. The magnolia tree can be considered a classic Japanese symbol, and its incorporation into the header of each page is a subtle reference to the Japanese roots of karate, without being overly apparent. This less direct, more oblique reference to Japan is more easily interpreted by those with moderate knowledge of Japanese culture, thus the website makes the slight assumption that visitors to a karate site do have some basic knowledge about Japan and are able to make this connection.



Figure 14: Header Legend Shotokan Karate

On the website homepage, a brief description of Shotokan karate is provided beneath a black-and-white photograph of an elderly man wearing a black gi: “Gichin Funakoshi founder of Shotokan Karate. Legend Shotokan Karate followers are trained in the true tradition of Shotokan Karate. Our roots are planted firmly in the Funakoshi tree.”

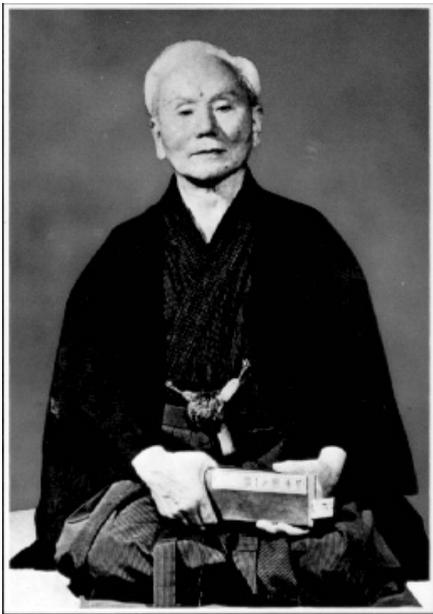


Figure 15: Gichin Funakoshi

This short synopsis already has the beginnings of a loose narrative, as the language highlights the significance the school places on the history and heritage of the sport—words such as ‘legend’, ‘true tradition’, ‘roots’, ‘planted’, and ‘Funakoshi tree’. The metaphor of the tree is a double entendre, used as both a reference to the ancient Funakoshi family that founded Shotokan karate, while the symbolism of a tree can also represent time, history, strength, life, antiquity, and growth. The roots of a tree can embody stability and power, while the branches and leaves of a tree can embody vitality and health. The ‘tree of knowledge’ and the ‘tree of life’ expressions also come to mind, as a tree represents positive characteristics and family values. The homepage of the website tells the history of Shotokan karate before providing any history of the school, thus the larger history of the sport is more important than the smaller history of the independent school. The information provided about the school on the homepage is as follows: “*The Legend is a family owned school*; we pride ourselves on always being there for every

student, whether young or old, for the rest of their lives whenever needed. We are proud to say that we measure our school not by the amount of students but by the accomplishments our students make. We invite you to compare” (sic). The beginning of the first sentence appears in bold, italics, and is underlined, stressing the strong role family plays at the school while connecting the school to the positive attributes associated with family values and family ties. Family is also closely connected to history, as characteristics all members of a family share are their mutual family background and hereditary genes. This short summary also includes a succinct narrative of a small family run karate school, where teacher and pupil resemble parent and child, where members delight in the accomplishments of other members, helping one another to improve their technique while working together for the common good of the school. By mentioning the school is ‘family run’, visitors can conjure an image in their head of tradition, respect, protection, and trust. By stating the school is there for their students “for the rest of their lives whenever needed”, a reader may have a self-constructed story of a young boy starting his training at the school, earning a black belt, becoming an instructor, and eventually growing old with his karate family.



Figure 16: Conflict Photograph

While the website does not explicitly state anything about self defence or protection as a marketing tool for the school (these benefits of karate may be assumed to be widely known), it is implicitly referenced on the ‘programs’ webpage in the form of a stock photo. The modern-day photo captures two men wearing business suits in what looks like the outside of a business building in a metropolitan location. One man is an aggressor, leaning into the other man, one hand gripping his tie, the other hand in a tight fist close to the second man’s face. His facial expression appears angry and threatening. The man being attacked is leaning backwards in avoidance, his hand up by his head with an open palm, a look of panic across his face. The narrative within the photo is equivocal as the events preceding the moment captured by the snapshot are unknown, and it is not apparent which interpretation the school wants the visitor of the website to take. Perhaps it is generally used to represent a generic situation of physical conflict. One

possible interpretation is the school is using the photograph to represent a situation a future student could find himself in, unexpectedly threatened after work and unprepared to protect himself without adequate karate training. A second possible interpretation is the aggressor in the photograph has been treated poorly by the other man, possibly being subjected to verbal abuse for too long, and since he has karate training he is able to use it to warn the other man that he must change his behaviour. The man who was once powerful with his words, is suddenly vulnerable when he realises the man he was verbally abusing knows martial arts. Whichever scenario the visitor of the website and viewer of the photograph assumes, the usefulness of knowing self defence through Shotokan karate training is emphasised.

The 'black belts' webpage contains more text than any of the other pages. It features a photograph of the black belt dojo members standing together, followed by a story titled: "The Eternal Flame shall live and the Legend shall never die". Here the story of the dojo is shared, as the webpage declares: "Our promise is to the founders of the Legend and for those who came first and withstood the unkind sneers and the hateful insinuations that was said about our dojo". About the dojo's critics, the page claims, "of course like true New Yorkers', we let them think what the[y] wanted to think. We went to tournaments to win not to make friends; and win we did" (sic). The mention of being New Yorkers in this context, by implying that 'of course' they acted the way they did, grounds the dojo in a second location. Elements from both Japanese society and New York society are thus incorporated into the dojo, through both its history and its modern circumstance. The story goes on to say how the dojo came to earn the respect of its sceptics, and what the symbol of the flame represents to the dojo, an icon that is specific to this particular karate school and is not shared amongst the wider Shotokan karate style. The page announces it will share the meaning behind the flame icon: "we will tell you the true meaning of the flame we wear. It is our dojo kun, words to live by", subsequently explaining how the flame represents knowledge "passed from Sensei to student", the reaper "represents life", the enlarged eyes "remind us to always be aware of our surroundings", the absence of a mouth is a reminder to never "be boastful" and to always keep in mind that you represent the school, and finally, "the jade amulet is very significant. It is believed that when a craftsman carves a piece of jade, a portion of the craftsman's' essences is woven into the Jade. When you receive the symbol of our school, you receive a part of your Sensei's spirit". The meticulous detail the small school incorporates into its own personal brand, separate from the Shotokan style, is remarkable.



Figure 17: Symbol of the Flame

The small dojo has thus established a personal icon or image for the school representing the values shared by its members while also honouring the founders of the school. While this story is not included on the homepage (where the history of Shotokan karate appears), it is still given a great deal of attention in the small website. The website uses the history of Shotokan to give the school relevance, while it uses the personal history of the school to differentiate itself and provide a more intimate frame of reference for visitors. Both narrative histories are important for the school, adding elements that enhance its credibility and elements that make it unique amongst numerous, more generic martial arts schools. The two histories combined create a distinctive value proposition for the dojo; members can feel included in a larger network (that of Shotokan karate), while also feeling like members of an exclusive club (that of “The Legend” school). The tone of the website suggests the importance of honour and tradition; participants take the school and its values seriously, and there is a vaguely implied notion that one is propelled by higher ideals through martial arts practice. The spiritual aspect of the symbol and the narrative behind it suggest a passing down of principles and customs.

5.2.4 Inharmonious History

The Shaolin Temple is often mentioned in international media, frequently propelling stories of its history and myth and generating further interest in the ancient monastery. The focus of the articles varies, from tourist tales and travel tips, to stories of the monks and other participants, to its status as a UNESCO world heritage site. The article selected for detailed analysis is “Kung fu under attack” by Tania Branigan for The Guardian newspaper, published May 24, 2011, as it combines many storylines appearing in numerous articles and can be considered most typical. The sub-title, “China’s Shaolin temple is the home of kung fu. But are tourism and Hollywood ruining the warrior dream?” quickly mentions the myth of the birthplace of kung fu, while also introducing the disequilibrium of the warrior dream being ruined. Here the author clearly pre-

sents the subject of analysis within the article: the conflict between the ancient temple and tourism/Hollywood. The author questions the dichotomy between history and modern tourism, suggesting the two perhaps cannot prevail in conjunction.

The article is about the Shaolin Temple in Henan province, China, as it appeared in 2011, but with historical features integrated in. This article begins by describing the setting with the use of rich, descriptive words that romanticise the atmosphere and set the scene of the narrative. The first paragraph solely describes the physical surroundings, starting with the moon: “the finest sliver of pale gold in the blackness lying over the Songshan mountains.” This first sentence in the article, describing an unrelated physical component (the moon), informs the reader that the story is not a typical newspaper article, rather it adds more elements beyond the standard factual writing style that is typical of journalism. The second sentence focuses on the wind, using illustrative words such as ‘rushing down’, ‘shaking’, ‘rustling’, and ‘jangling’, almost personifying the wind in an abstract way. This first paragraph makes no mention of the temple, the monks, or of martial arts, but the unfamiliar scene featuring the Songshan Mountains, azure-winged magpies, bamboo and catalpa blossoms, and temple bells, draws the reader in with its exotic characteristics. The last sentence in the paragraph ends in ellipsis, rather than a period, suggesting the rich description could have continued on in subsequent sentences.

The ellipsis represents an interruption to the peaceful scene, and here the reader is introduced to some of the characters in the story for the first time. The author quotes sounds coming from the “diligent grey-suited teenagers”: “HUNNGGHHH!” “HAAARRRGGH!”, choosing to express the interruption not in words, but in a series of capitalized letters, which when read aloud phonetically sound like the combat described by Branigan (“Foot thwacks against thigh [...] Flesh smacks on to flesh”). The author has illustrated a contrast here, first describing a peaceful scene, then interjecting this with the onomatopoeia-esque sounds of combat; a stark contrast to the tranquillity of the previous paragraph.

Branigan uses this opportunity to formally introduce the Shaolin Temple to the reader with the first factual statement in the article thus far: “Welcome to the home of kung fu: a Buddhist monastery, renowned for its warrior monks and inspiration to martial arts enthusiasts around the world, on the dusty outskirts of Dengfeng in the impoverished and otherwise unloved province of Henan”. This statement suggests a few things: first, that the Shaolin Monastery is the birthplace of kung fu; second, that the temple is internationally renowned; and third, that the temple is the only ‘loved’ feature of Henan province. The author then provides a historical background to the legend of the Shaolin monks, stating that its roots date back to approxi-

mately 1500 years ago, when “the emperor Xiaowen [...] ordered the construction of a temple, deep in a mountain forest, in honour of a wandering Indian monk. By the 13th century, it was home to around 2,000 monks, famed for their virtue and skill in martial arts.” Here the author informs the reader of a historical narrative; yet the protagonist, the Indian monk, remains nameless—the only distinguishing characteristic is that he was “wandering”. The emperor is mentioned by name, but the lack of name for the monk being honoured represents a silenced character in the story of the temple.

If applying Kenneth Burke’s pentad dramatist analysis (Czarniawska, 2004: 103), the *act* in the text can be represented as: 1) the Shaolin Temple is the birthplace of kung fu, thus it is a popular destination for travellers; 2) however there is a growing fear that the monetary goals of the temple will overshadow Buddhism and other genuine qualities, as many are eager to exploit the monastery; 3) the temple must find an equilibrium in order to protect its reputation and its brand. The *scene* is its publication in a major British mass media newspaper, thus it can be regarded as journalistic writing rather than imaginative writing. This is a publication with global reach, thus the author has a loud voice amongst a general audience primarily located in Great Britain. The *agent* of the article is the author Tania Branigan, who is the China correspondent for The Guardian newspaper. Branigan’s *agency* was through selective interviews with a variety of people who had various connections to the temple: the foreign liaison officer, general admirers of martial arts, foreign tourists, female students, and the “most controversial” monk at the temple. She also incorporated additional research done by Han Cheng to provide a more factual, less subjective foundation to her story. The *purpose* of the article is to entertain, while also questioning the modern activities of the temple through contrast to its ancient roots. Branigan is careful to use an objective voice throughout the article as the narrator, presenting the more controversial statements in the form of quotes from those she interviewed.

There are a number of narratives overlapping throughout this article. Shi Yongxin is a central character throughout, who provides his own assessment regarding the changes that have occurred at the temple within the past thirty years. Shi’s story is a rags-to-riches one, growing up the son of a poor farmer and later spearheading the development that transformed the temple into the global brand it is today, while simultaneously turning himself into a widely-recognisable figure in the martial arts community. The author uses a metaphor to put Shi’s role at the temple into a context that is more relatable to the reader: “walking through Shaolin with the abbot [...] is a bit like escorting Donald Trump through Times Square in New York.” She then describes the effect his presence has on temple visitors who desperately attempt to take photographs of Shi as he walks by. Shi is directly involved in the protection of the Shaolin brand, preventing

“others from issuing substandard products that could damage [...] the monastery’s good name”, which Shi claims, “is quite bitter for us, spending money and time fighting for trademarks and Shaolin’s reputation”. The author presents Shi as the central character in the modern day story of the temple, essentially framing him in such a way that he comes across as the temple’s brand manager. Her incorporation of the Chinese media’s portrayal of Shi as the “abbot with the MBA”, while suggesting herself that “his business acumen extends far beyond the monastery giftshop” and Shaolin’s franchising of four other temples is “a measure of the temple’s money-minded reputation – fast rivalling its kung fu fame” fuelling rumours of the temple’s plans to go public on the stock exchange, shows the author’s slightly subjective, negative feeling towards Shi’s character. She includes other character references not directly related to the temple, rumours that he was caught with prostitutes, the luxury car he drives, and his elaborately “embroidered robe from a brocade firm, the gold thread alone costing a reported £5,000.” By including the value of the thread, an amount considered high even by western standards, Branigan portrays Shi’s lifestyle as entirely contradictory to the lifestyle of other citizens residing in China’s most impoverished province, as well as contradictory to the life of a Buddhist monk. This dichotomy, between the public life of Shi and the private life of other Chinese citizens living in Henan province, represents a conflict the author has found in the story of the Shaolin Temple, and which she uses in the article to cast a negative light upon the modern pursuits of the monastery.

Branigan concludes the article with the high unlikelihood of students succeeding at martial arts, but highlights the optimism of the students at the same time. This presents another dichotomy in the story, bringing attention to a contradiction that exists amongst many martial arts students who study at the temple—their dreams overshadowed by a more pragmatic understanding of the reality of their situation.

5.2.5 Glamourized History

A podcast is an online audio file available for download and often resembling a radio show in style and length. Podcasts are a relatively new development and provide an interesting and contrastive format for document study. The podcast selected for analysis in the case of martial arts is the Martial Arts Lineage Podcast, established in April 2011 and offering a total of 26 episodes for download (The Martial Arts Lineage Podcast, 2011). The description of the show, available on the iTunes page, is: “Listen to interviews with martial arts masters from around the world. Learn about the history and development of different styles and how martial arts continue to develop today” (Apple iTunes, 2011). The episodes cover a variety of subtopics, ranging from interviews with various people deeply involved in an assortment of martial arts styles, a lesson

on how to market your martial arts school, and some anthropological and philosophical interpretations of different styles.



Figure 18: The Martial Arts Lineage Podcast

The episode selected for detailed analysis is episode 26, published 22 April 2012, and titled: “Interview with Sifu Shi Yan Ming, Warrior Monk and Abbot of the USA Shaolin Temple.” Warrior Monk is a weighty title, possibly suggesting more skill than the traditional “fighting monk” title that was often used to describe those who practiced at the historic Shaolin Temple in China. Including the word ‘warrior’ adds characteristics such as bravery and fearlessness to the monk’s description. Also of interest is his abbot title to the USA Shaolin Temple. Rather than creating a new name for the new temple, the name of an already existing and active temple is recycled, displaying the importance and value that is placed upon the Shaolin name. By naming the temple in the United States ‘Shaolin’, its connection to the temple in China is secured in an obvious and easily recognisable way. The credibility of the Shaolin name is not lost on the monk, and by reusing the Shaolin Temple name in New York, a historical message and an ancient Chinese story are attached to a modern and urban facility in a large American metropolis.

The podcast begins with a standard foreword about the show and then quickly introduces the guest being interviewed. The host announces, “I always start by asking my guests to tell me about their history in the martial arts”, and then requests the monk describe his childhood in relation to martial arts. Asking this question first acts as a good introduction, but it also grabs the listeners’ attention by quickly talking about the emphasis of the show, which is the historical aspect of martial arts. The monk’s general history is not requested, only his history directly relating to martial arts is. This podcast is non-standard because it has a narrower focus than just martial arts, by primarily discussing the lineage of martial arts. The monk being interviewed in this episode has a particularly relevant history because of his time spent at the Shaolin Temple in China. The host of the podcast is well aware of this, and he accentuates the historical connection throughout the course of the interview.

The monk begins his personal story by saying, “when I was three years old, I almost died”. This powerful opening statement is short and to the point, and immediately piques the curiosity of the listener who wants to know how this happened, and how it relates to martial arts. He shares his own personal narrative about the Shaolin Temple, which he joined when he was five, and

which he describes as being “so beautiful”. The narrative is overwhelmingly shaped by the host, who directs the discussion and asks leading questions in order to explore areas that he believes are of interest, and his involvement in the story is as influential as the role of the monk—the storyteller—by carefully selecting questions and orchestrating the flow and length of the interview. Thus the host, who through his inquiry skilfully leads the interviewee to share aspects of his story that perhaps would not have risen naturally, steers the monk’s personal story by asking questions such as, “what was your earliest memory of living with the monks at the Shaolin Temple?” When asked what the instructors at the temple who taught kung fu were like, the monk describes them in familiar terms, saying “like my father” and using the metaphor of the temple being “like a family temple”, which he repeats three times, explaining that while they were “not a blood related” family, they still respected each other like a family. The connections between martial arts, family, life lessons, and honour are discussed in a serious manner, and both the monk and the host sound solemn and earnest when referring to these important characteristics.

The monk brings up the subject of Jet Li’s first movie, *The Shaolin Temple*, and describes how it dramatically changed life at the temple in the 1980 and 1990s: “total change, total difference. Before 1980s [the] Shaolin Temple didn’t have that much of interest. After the 1980s [...] lots of tourists visited the Shaolin Temple.” The impact the movie had upon the remote temple primarily came in the form of increased tourism, yet the monk adamantly insists it did not affect his daily life because “nobody changes you, nothing changes you, you change yourself”. The monk mentions the specific year, 1982, the movie came out, a memorable year because it represented a dramatic shift in the narrative of the Shaolin Temple, perhaps a climactic point in the monastery’s long history. The monk makes it seem like 1981 was thoroughly different from 1983 at the temple, and the changes brought by the film’s release were permanent ones.

After the historical narrative of the monk’s life at the Shaolin Temple in China, the conversation shifts to his present day narrative in the United States and his current project building a traditional Shaolin Temple in New York City. His motivation behind the project was that “Shaolin Temple martial arts and Shaolin Temple philosophy belongs to everyone”, so he decided to stay in the United States and help more people by building an authentic Shaolin Temple in the 21st century. He supports his project by explaining that the Shaolin Temple has “been alive for over 1500 years” but during a different dynasty, their Buddha house was destroyed and still has not been rebuilt. Establishing a Shaolin Temple in the United States was his own personal way of making up for that loss. He describes the Shaolin Temple in New York as “authentic” but also combined with some “21st century technology” such as the Internet. In describing the temple,

the monk almost always refers to it as the Shaolin Temple rather than just the temple, despite the unlikelihood of a listener's confusion over which temple he was referring to. The Shaolin name is vitally important to the monk, he enjoys saying it, and he feels a need to say it. The Shaolin title is powerful, influential, and formidable, including it in a sentence adds strength to that sentence and the adjacent words.

A third narrative within the episode is when the monk describes the hypothetical life of a future disciple at the Shaolin Temple in New York. Even his future narrative is deeply ingrained with aspects of the past, as he describes how comparable the life of a student in New York will be to the life of a student in China, and how physically similar the new temple will be to the old one. He mentions the Temple has 72 chambers because there are 72 small mountains in the Song mountain range, the location of the original Shaolin Temple. Historical features appear in each of his narratives, including his past personal narrative, his current personal narrative, and the future narrative he tells about the temple in New York. His descriptions are rooted in heritage and grounded in historically significant locations, accentuating the momentousness of the temple's age and the pre-eminence of Shaolin kung fu. The monk describes how Shaolin kung fu differs from the rest because it combines elements from varying styles, essentially a hodgepodge of all the best elements, which the monk explains through the use of a buffet analogy: the Shaolin Temple has many different styles to try, like enjoying food of different styles and flavours.

5.3 Chapter Summary

While five documents were studied for close analysis, over 100 documents from various mediums were viewed for the martial arts portion of this thesis. From this broad spectrum, one can deduce that history and myth do play a critical role in the communication and participation surrounding specific sports under the martial arts umbrella. In particular, kung fu frequently uses the Shaolin Temple narrative, conveying its historical roots and often directly relating this to present-day narratives within kung fu. The Shaolin Temple story is produced, sold, and consumed by authors and participants, as "stories do not lie around – they are fabricated, circulated, and contradicted" (Czarniawska, 2004: 45). Popular legends from all martial arts sports are shared and disputed, with various authors either embracing the tales, or seeking ways to dismantle them from a controversial angle. As Czarniawska states, "long-lived narratives, especially stories, are sediments of norms and practices and, as such, deserve careful attention" (2004: 45). The Shaolin Temple is a long-lived myth that plays a prominent role within both kung fu, as well as the wider spectrum of general martial arts, occupying the momentous role of the birthplace. The roots of the Shaolin Temple have become so profound within martial arts that the history behind the monastery has been telescoped into myth, establishing concrete uni-

versals within the community. The Shaolin Temple and its stories act as a source of order within the society, while also making the participants' role more relevant and meaningful.

CHAPTER VI

DISCUSSION AND CONCLUSION

6 Discussion and Conclusion

In the conclusion chapter, we will first provide a discussion to supplement the analysis chapters of the thesis, followed by the managerial implications of this study, and finally the limitations and future research suggestions. The chapter will conclude with an epilogue.

6.1 Organic Brand Heritage

This thesis examined how brand heritage can unfold over time and through multiple authors, investigating the development of brand heritage through a study of the establishment and communication of shared history and myth. As supported by our document study, history is not static; it is in a perpetual state of evolution and can be interpreted in different ways by different individuals. The focus of the thesis was to examine two sports umbrellas to better understand the different ways of treating, using, and handling history and myth in the context of multiple author involvement. Applying this approach to study the organic dissemination of brand heritage and history provided us with an example for the wider application of corporate branding.

The objective of this thesis was to study whether the history of a brand can be rewritten in the context of multiple author involvement, raising the question of whether brands can develop a heritage in the absence of a marketing or branding team. Thus, after document analysis, the **discussion question** proposed is: *In the absence of centralized brand managers, how can brand heritage organically develop, involving multiple authors?*

While this thesis presented an introductory examination of how brand heritage organically develops through unencumbered and independent handling and rewriting of history and myth through the voices of multiple authors, in doing so, it challenged preconceived notions of brand heritage and heritage building, attempting to provide an understanding of what happens to brand heritage when a marketing team is not involved in the brand building and managing process, and applying this to a larger corporate context. The two sports umbrellas provided unique examples of what we have labelled *organic brand heritage*, that is, brand heritage that has developed organically without overbearing management and autocratic control. The term *organic brand heritage* has been developed in relation to the two distinct elements within this thesis: that history is constantly rewritten, and that history involves multiple authors. The organic character of brand heritage is thus a consequence of the dynamic nature of history and the fragmented authors who shape it. A study of organic brand heritage can help provide insight into the various ways a brand's message might be communicated in a more independent, less obtrusive situation, where a brand manager is not actively seeking to manipulate and execute control over

the brand's identity. The applicability of the branding of the two sports umbrellas could thus provide a comprehensive understanding of corporate branding with a heritage within multiple industries.

The two case studies have provided good examples of the emergence of brand heritage, partly because of their ancient roots and their differing treatments of history, which present two distinct approaches to historical branding: at first glance, while equestrianism tries to emphasise and reproduce its heritage, martial arts attempts to rewrite and redefine its heritage. Our findings, however, provided new insights that were contradictory to this initial presumption. The two examined approaches of historical branding were possible to interpret differently. Rather, equestrianism attempts to rewrite and redefine its heritage, whereas martial arts attempts to emphasise and reproduce its heritage. While martial arts evidently emphasises the importance of the Shaolin Temple, the birthplace of the sport and a location where myth still plays a dominant role in defining its roots, equestrianism treats and handles its history and heritage less precisely. Both sports umbrellas demonstrate a connection to their ancient roots, highlighting history rather than hiding history. This refers particularly to equestrianism, where the various authors studied make use of certain aspects from the past and reuse them in their own interpretation, thus they rewrite history and heritage for a contemporary purpose. In doing so, this was very much associated with our theoretical framework.

Equestrianism is a sport that since its inception has been stamped as the activity of a social elite. Whereas martial arts is founded and practiced by monks, who are known to take vows of poverty and chastity, where the 'self' is studiously subverted. Both sports have fairly coherent 'histories', but from a marketing point of view it is much easier to utilize equestrianism since it fits within a neatly delineated class strata of the highest level, and since much of society seems preoccupied with striving for the attainment of what is out of reach, it is a relatively simple matter to pair the sport with the acquisition of luxury goods. Both sports developed without any 'brand' interference or management, but since equestrianism was the sport of kings and noblemen and the wealthy, the sport enjoyed de facto celebrity endorsements, albeit of the time. Through the analysis, equestrianism seems inherently more competitive, whereas martial arts may hold competitions, but as an intrinsic value, martial arts seem to value honour, restraint, and modesty. Martial arts is more value-based as opposed to equestrianism, which is more outcome based. Comparing the two sports umbrellas according to its participants, we can infer that martial arts represents messy egalitarianism, whereas equestrianism has a rigid hierarchy.

We can conclude that multiple authors can have strong influence on the development of a brand's historical background and the establishment of strong brand equity. This mirrors the organic development of brand heritage.

6.2 Managerial Implications: The Absence of Brand Management

This thesis intended to question the notion of heritage branding, suggesting the management of branding is uncontrollable due to multiple author involvement and the dynamic nature of both history and myth. The very idea of *branding*, in the gerund form, suggests an active agency in the management of branding—that the action can be performed in a deliberate and premeditated way by a branding team. The managerial implications of organic branding are paramount, since it suggests the role of the brand manager is artificial and the influence of the brand manager is aggrandised. From the point of view presented in this thesis, history and brands are to a large extent uncontrollable, which consequently means that any attempt to superintend a brand or its history becomes fruitless and in vain. The position of this thesis holds that brand managers can learn an important lesson about the illusion of control, an idea business schools dangerously promote to their students. Business schools perpetuate a false image of the world as something that is controllable. Brand managers should stop controlling, and instead start following and start adapting. If a corporation is truly market-oriented, one should see the brand is adapted and customised by the market, not an invariable and stable possession of the corporation. The erroneous suggestion that brands and their history is controllable should be problematized in both the classroom and the workplace.

6.3 Limitations and Future Research Suggestions

This study was conducted under the strict time restriction of ten weeks, which limited us in regards to the number of documents we were capable of providing adequate analysis for, despite an abundance of documents being available to study within this context. This time restraint forced us to narrow our study and make choices, thus limiting the overall reliability of the study, but gaining some depth by means of sacrificing breadth. Thus, our results can only be speculative and refer to a fictive scenario, rather than precise circumstances. A more comprehensive study of the same topic could be a potential area for further research. We chose two case studies for the interesting points they provide through both resemblances and contrasts, a further, more detailed study of only one of these umbrellas, or one of the sports within one umbrella, could also develop our general conclusion further.

Qualitative document analysis emphasises “discovery and description” through the search for “underlying meanings, patterns, and processes, rather than mere quantity or numerical relationships between two or more variables” (Altheide, 1996; Berger, 1982; in Altheide, 2000: 290). As mentioned, the research conducted in this thesis was based on an analysis of diverse documents that uncovered meaning, developed understanding, and discovered insights relevant to the research question. In order to analyse several documents while contributing to the conversation of the rewriting of [brand] history, we primarily investigated the language and imagery within each document, as “words are powerful when they become symbolic frames” (Altheide, 2000: 291). Like all data collection methods, document study has its limitations. Thus, in order to offset negative public opinion regarding document study and its shortcomings, such as low retrievability, insufficient detail, and biased selectivity, we approached multiple sources before narrowing which ones to investigate, selecting those that were most representative of the writing of history.

Qualitative document analysis is based on our own interpretations of documents we have hand-selected, thus it is subject to personal bias, yet “remains empirical, meaning that instances of certain meanings and emphases can be identified and held up for demonstration. While generalization to a broader population is not the foremost goal, generalization can be accomplished at a later stage of research” (Altheide, 2000: 290-291). The document analysis adopted within this study focuses on reflecting contextual factors and not simply reflecting reality, as a way of revealing the intentions of the document producer. For these reasons we regarded document analysis as an appropriate research method for understanding the natural approach to branding history with respect to the two sports umbrellas.

This study was also limited to the context of two broad sports umbrellas, which are too inclusive to provide an intricate analysis of each; thus, we had to carefully select from within the sports umbrellas which sub-sectors of sports we would extract our documents from. Had the duration of the overall study been longer, we could have included a more wide-reaching encapsulation of the heritage branding phenomenon within the broad fields of equestrianism and martial arts.

The relation between our choice of empirical material and the domain this thesis attempts to participate in do present limitations stemming from unrelated aspects of sport and corporate brand heritage. While we are aware of the potential limitations of our study in this regard, it is our conviction that by studying sports we gain a more holistic understanding of history and heritage without the confining perspective of business and corporations limiting our overall

scope. The two sports umbrellas share similarities with multinational corporations in their need to defy cultural barriers, their need to involve a wide assortment of participants, and their need to keep participants/consumers interested in their product offering by providing benefits that go beyond the standard offering provided by competitors/other sports.

The nature of the 'rewriting' history concept restricted us from using other approaches within our methodology such as interviews and surveys, as the pivotal role of the writing process within this thesis required us to approach our research question using document analysis. A study of brand heritage building, void of the concept of rewriting, could provide another area for further research through the use of alternative methodologies.

An additional limitation is the notion of 'management-free brand building', a concept we developed within the context of this thesis, and which could be debated at great length in regard to what specifically qualifies as management-free. We took the approach of multiple, fragmented authors with various objectives and from different cultures and contexts to constitute a void in the position of centralised brand management. We understand this concept may be interpreted differently by other authors, and perhaps a second study done under an opposing interpretation of its meaning could be an interesting area for further research. Another area for future research could be the study of the absence of centralised brand management within a different industry. A further examination of how consumers develop brand heritage and give meaning to a brand's history with a stronger analytical connection to consumer culture theory could provide interesting results.

6.4 Epilogue

By problematizing the notion of management and what it means to manage a brand, this thesis challenges the role of the brand manager in the context of building and maintaining a brand heritage. The results of this study must be considered in a 'context sensitive' manner within the document analysis produced by the authors concerning the two sports umbrellas (Czarniawska, 2004: 44). However, the applicability of the branding of two sports umbrellas can be extended to a wider corporate reach within multiple industries. If the results of this study were to be seriously considered, the implications could change the nature of the brand manager position as it relates to brand heritage. Managers would need to adapt to the branding that is altered and dominated by consumers, taking a secondary position in the overall communication of the brand message. Corporations would focus more on product development and enhancement, allowing the consumers to build the brand's story based on the performance of the brand's pro-

duct. Participants of the brand, who may each differentiate the story in various ways, would establish the narrative.

The moral lesson of this thesis is the unreliability of brand management and the extraneous role of the brand manager. Since the power of external influences is strong, it is not possible to fully control a brand through its development and the building of its narrative. When the question *what is history* is presented, conflicting notions of where history stems from will inevitably be revealed: does history occur in the mind of the documenter, or in the mind of the reader, or in the text itself? Divergent answers to this question reveal the uncontrollability of heritage and how it can be approached in various ways from differing perspectives. The notion of brand heritage is thus equally as speculative as history, since brand heritage is grounded in first developing an understanding of what history is. History and heritage are not only consequences of multiple authors, but also consequences of multiple readers. Understanding history and brand heritage needs to be extended to a larger frame of reference, including perspectives of authors and readers, as history is not only a matter of writing and distributing, but also a matter of reading and comprehending.

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Appendix

Appendix 1: Types of Brands

Anything can have a brand; there is no limit to what is brandable (Healey, 2008: 6). Branding is a subsection of marketing; a brand represents an experience, it offers a promise of that experience, and it adds meaning to that experience; thus, branding becomes a two-way process involving providers of the brand and consumers of the brand experience (Healey, 2008: 6, 8). This brings us to the notion of experiential marketing and branding, with emphasis placed on branding the experience, as “experience is the best way to appreciate something; the experience is usually the most memorable aspect of each thing we buy” (Healey, 2008: 28). Additionally, all “purchase decisions are essentially made in order to engage in a certain experience” (Healey, 2008: 30). Branding today involves five components: price, design, positioning, storytelling, and customer relationship (Healey, 2008: 8). The most relevant component in this thesis is the storytelling aspect, as emotions and storytelling are avenues frequently exploited by brands, since “the experience of enjoying a good story is a powerful one that pulls in all of our senses and immerses us so that we feel as if we ourselves are actually living the story” (Healey, 2008: 6, 28).

The notion of holistic brand was coined by Martin Lindström (2005), who understands a holistic brand as one that “anchor themselves in tradition but also adopt religious characteristics at the same time they leverage the concept of sensory branding as a holistic way of spreading the news. Each holistic brand has its own identity, one that is expressed in its every message, shape, symbol, ritual, and tradition” (5). The two sports umbrellas of equestrianism and martial arts may fall into the category of holistic brands, since they promote a shared experience, the participation in rituals and traditions, and communicate through storytelling as a means of building a relationship amongst participants, as well as between participants and the sport experience. Emphasis is placed on relationships and experiences within both sports umbrellas, as they foster notions of a clear identity that is comprehensively understood by all participants.

Appendix 2: Sports Marketing

As this thesis directly relates to sports marketing and branding, it is useful to provide a background and a context to current conversations occurring within this field. Since the consumption of sports is “one of the most pervasive leisure roles in modern society” (Morgan & Summers, 2005: 4), the marketing of sports as a discipline has generated a great deal of interest in recent decades. Sport is a leisure activity with global appeal—it attracts people from all cultures,

ages, income levels, nations, and backgrounds (Morgan & Summers, 2005: 4). As the role sport occupies in people's lives becomes more significant, it can begin to help define an individual's own history and heritage, with a prominent role in one's lifestyle (Morgan & Summers, 2005: 4). While the field of sport has experienced phenomenal expansion, other industries have been eager to involve themselves in the hype, through corporate sponsorships and an overall growth of entrepreneurial involvement within the sports industry (Morgan & Summers, 2005: 4). The recent international and commercial growth of sport (Bauer et al., 2005), combined with an increase in worldwide travel and international migration, has resulted in the rapid spread of marketing innovations within sport (Ratten & Rattan, 2011: 614). The "unpredictability of sport as a product combined with the largely intangible and experiential nature of sport" has established sports marketing as a "discipline area in its own right" separate from that of marketing in a more general sense (Morgan & Summers, 2005: 5). Sports marketing has been defined as: "the specific application of marketing principles and processes to sports products and to the marketing of non-sports products through association with sport" (Shank, 2002: 2). It has also been defined as "consist[ing] of all activities designed to meet the needs and wants of sport consumers through exchange processes" (Mullin et al., 1993). It is a "multidimensional field of study encompassing a wide variety of activities" (Coleman et al., 2001: 196). Sport falls somewhere in between an intangible service product and a tangible goods product, creating unique challenges for sports marketers who must combine strategies (Morgan & Summers, 2005: 6).

Sport can be interpreted as a cultural phenomenon, since it has "been a part of the history of every culture in the world and continues to be a contemporary vehicle for cultural definition" today (Morgan & Summers, 2005: 52). Sport can help define one's individualism, while simultaneously establishing a sense of "communal belongingness" through sport rituals and language (Morgan & Summers, 2005: 52). Sport can also help define a national cultural identity, however as global exports have increased, sports too "have migrated to new countries [...] An interesting phenomenon because much of the ritual and spirit of the sport may be grounded in another culture" (Morgan & Summers, 2005: 52). Sport can also help define a consumption subculture within society due to "self-selection in the case of sport" (Morgan & Summers, 2005: 58). The consumption of sport can be symbolic in nature: as participants strive to identify with a subculture, they attempt to utilise it as a means of enhancing their own personal identity (Morgan & Summers, 2005: 59). With a high level of visibility, Sports can generate consumer brand loyalty and tremendous enthusiasm from both participants and observers (Coleman et al., 2001: 197).

While the conversation surrounding sports marketing has received increased attention in recent years, sports marketing is still a neglected area within the broader field of marketing, and with

its “rising importance, sports marketing definitely needs closer attention from marketing academics and practitioners alike” (Schaaf, 1995; Shank, 1999; Douvis & Douvis, 2000; Coleman et al., 2001: 198). Given the increasingly pervasive and significant cultural role sport plays in society, and as ever-changing as sport is, “there is surprisingly limited academic work available” in this area (Coleman et al., 2001: 210). The sports industry has been regarded as a “seedbed for innovative and unique promotional strategies, supplementing more traditional efforts”, and its application could possibly be incorporated into other unrelated industries (Coleman et al., 2001: 198). Sport is currently the eleventh largest industry in the United States, yet few mainstream marketing journals are “willing to publish manuscripts on sports marketing” (Shannon, 1999: 517). The time for the marketing discipline to recognise the “size, importance, and potential of this industry and embraced it” is long overdue (Shannon, 1999: 524).

The connection and integration of sports marketing with other international business disciplines has been discernibly avoided from both an academic and a practical standpoint (Ratten & Rattan, 2011: 614). More research is needed to “determine how sport is being built, developed and extended internationally” (Ratten & Rattan, 2011: 616). Sports brands have managed to transcend geography with a focus on the global appeal of the sport (Muniz & O’Guinn, 2001) through unique factors such as youth appeal, social interaction, communication power, mass media distribution, sustainability awareness, and positive health impacts (Sheth & Babiak, 2010). An appeal for further research regarding the internationalisation of sports through case studies has been made, along with a need for empirical work that compares various international sports brands and their origins and the “expectations of the entrepreneurial sport founders in creating these sports brands” (Ratten & Rattan, 2011: 618). It has also been mentioned that it would be “novel to study whether different types of sport popular in Asia such as martial arts and tai chi will gain in popularity worldwide at the expense of traditional sports such as baseball and basketball” (Ratten & Rattan, 2011: 619). A study to illuminate the importance of image and reputation in the international marketplace would also be beneficial within the field (Ratten & Rattan, 2011: 618).

However, a vital area of research in our globalised society is a more practical approach to study “how to combine both the sport marketing and international business literature in order to establish a robust research agenda for future international researchers from around the world to focus on international sporting developments” (Ratten & Rattan, 2011: 619). The shared common ground between business and sport, for example the determination of success relying heavily on strategy and management in both industries, further demonstrates the applicability and usefulness of sport to the business world (Adcroft & Teckman, 2008: 38). In the sparse lit-

