

Ikea's clash between brand identity, ideologies and employees' values

TEACHING NOTES

The authors prepared this case solely as a basis for class discussion and not as an endorsement, a source of primary data, or an illustration of effective or ineffective management. Although based on real events and despite occasional references to actual companies, this case is fictitious and any resemblance to actual persons or entities is coincidental.

Teaching notes

The following teaching plan introduces a guide on how to present the case "Ikea's clash between brand identity, ideologies and employees' values?". The purpose of the teaching plan is to let the instructor guide, prepare and structure the case in the most efficient way possible. By using this teaching plan as a guideline, the instructor has the possibility to structure a discussion effectively in class and allow students to derive the most of the case while at the same time have the possibility to obtain the desired learning objectives. To make it more comprehensible, several learning objectives are outlined in order to explain in what way the case can contribute to more knowledge on crisis management and what learning the case is expected to provide. Moreover, it gives suggestions for additional questions to discuss and how to conduct such cases in class by giving several examples and explanations of the case structure.

Case synopsis Learning objectives

In May 2019, Ikea group in Poland posted an article in the intranet regarding LGBT-movement, encouraging the employees to support the LGBT+ community by participating in the celebration the company was about to host. A religious employee, with the pseudonym Tomasz K., chose to show his disapproval by posting a comment to the article. He cited the bible which stated what destiny awaits homosexual people. Consequently, this made some employees upset and the incident reached Ikea's HR department which led to a problematic situation for the company in Poland. Tomasz K. got fired since he resisted to delete the comment which soon reached the media and contributed to an immense debate in the society and threatened Ikea's existence in Poland. The employee felt forced to approve values that were against his beliefs whereas the company considered that Tomasz K. discriminated LGBT-people and acted against the company's values. This leads us to the question:

How should Ikea determine what actions align with its core values and when should it respect the values of the countries it operates in, without harming its brand identity?

Learning objectives Overview of Key learnings

The following section gives insights into what key learnings the participation in the case presentation and discussion is expected to provide. This case is emphasized on Ikea but provides implications for other international companies as well and is especially relevant in the era of brand activism. Brands have started to take more active stands in different social, political and environmental issues which can create situations just as in the Ikea-Poland case.

Corporate culture

Roper and Fill (2012) say, "The message issue is complicated further because corporate culture, a key foundation upon which communications are developed, can both impede and accelerate the impact of corporate communication messaging" (p. 238). Similarly, the case reflects the importance of corporate culture but also the difficulty with establishing a consistent and commonly shared culture. A corporate culture is considered the key behind the success of an organization's corporate reputation. Therefore, there is a need for a commonly shared culture in order for communications to be successful and to enhance the corporate performance and reputation. Roper and Fill (2012) explain that culture is reflected in the employees' behaviour which is guided by beliefs, norms and values of the corporation. In this case it is worth highlighting the fact that Ikea's management considered their action and participation in the International Day Against Homophobia, Transphobia and Biphobia (IDAHOT) as a part of the employees' duty which would reflect a part of the corporate culture based on LGBT+ values while Tomasz K. considered these values as conflicting with his own beliefs. Consequently, this places the notion of corporate culture at an important stance in this case especially since it regards differences in country culture as well. It is therefore worth considering the levels of corporate culture and discuss the deeply embedded assumptions, beliefs and feelings on the bottom of the iceberg that constitute the shared values within the organization and are difficult to identify **Exhibit 1**. Roper and Fill (2012) explain that corporate culture is so deeply embedded that it is taken for granted which results in assumptions and drops out of awareness. Ikea's culture has a strong heritage of being open, inclusive and welcoming since their aim is to be affordable for everyone, where it can be discussed whether those values have become an assumption. Also, it is worth considering whether Ikea has a weak or a strong culture where a weak culture is more expensive and less effective and encourages individual thought whereas strong culture appears when members share values and live the values (Roper and Fill, 2012).

Employer branding

Employer branding is crucial, since such efforts can attract desirable employees and incorporate the brand essence to provide means of identification for the current employees (Roper & Fill, 2012). This, together with external messages of the brand essence to potential employees and other stakeholders enhances the reputation. Employer branding provides an employment promise for current or potential employees made by the company. It is a psychological contract between the two parties and a framework for what benefits employees would receive and represents mutual beliefs, perceptions and non-spoken obligations created upon trust (Roper & Fill 2012). In this case the psychological trust is considered to be broken. Tomasz K. was hired before Ikea chose to actively engage in LGBT+ community.

The clash between Tomasz K.'s values and Ikea's values created a gap that could not be unified and ultimately created a solid ground for dissatisfaction to grow.

Internal corporate communication

The employees should not only be considered to be an element of production, but also a brand ambassador. In order for the employees to be good spokespersons for a brand, they need to have good internal marketing communications to keep them motivated and involved with the corporate brand they are representing. This, to be able to present a consistent message to external stakeholders. Corporate communication is grounded in the corporate culture and should therefore reflect it. Consequently, the management aims to influence and encourage the aspired behaviour through its communication and enhance its identity (Roper & Fill, 2012). This can be reflected in the statement in the article that was posted on the intranet encouraging employees to support LGBT+ community. It is further necessary to understand the communication climate which is defined as “...*internal atmosphere concerning the way in which information is exchanged by managers and employees* (Roper & Fill, 2012, pp. 242)”. Therefore, the case can provide an understanding of what internal corporate communications can provoke and what consequences a company might need to face if the communication is misinterpreted or not shared among stakeholders. If a message is not aligned with the audience's expectations or suited to the task, it can be unsuccessful. Roper and Fill (2012) propose criteria for effective communication which are the following: *form, style, timing* and *tone*. These could be used as a framework when discussing the article Ikea posted and the answers on their webpage (Roper & Fill 2012 pp. 246). Moreover, the authors propose four different models for corporate communication **Exhibit 2**. Each model illustrates different reasons why a company chooses to communicate internally and in what way.

Crisis management

In times of crisis, a corporation needs to obtain trust among its stakeholders in order to contain the possible disaster (Greyser, 2009). Trust is obtained through an organization's performance, behaviour and communication. It is also important to determine the cause of a brand crisis, whether it harmed the brand essence where Greyser (2009) also gives several examples such as product failure, executive or corporate misbehaviour. The case of Ikea, the discussion on whether it was a corporate misbehaviour or a single employee's misbehaviour is of essence. Furthermore, corporations might face two main challenges when aiming for *authenticity* which Greyser (2009) describes as *situational* which occurs when a corporation needs to take a defensive approach and *generic* which refers to a corporation's over-promising performance. The latter one can cause a so-called promise-performance gap, which is especially analysed by media and critics in times of crisis (Greyser, 2009). To solve a crisis situation, there is a need for credible communications which is another aspect that contributes to the learning of this case.

Did Ikea communicate credibility in the case of the dismissed employee? Augustine (1996) says "*Finding, cultivating and harvesting the potential success is the essence of crisis management (p.148)*" and suggests six steps to manage a crisis. The steps are *avoiding the crisis, preparing to manage the crisis, recognizing the crisis, containing the crisis, resolving the crisis and profiting from the crisis*. These can be relevant to consider for the learnings of the case since it illustrates the importance of preparing for and managing a crisis.

Reputation

In a time when every move, decision and isolated event involves a company being analysed, documented and published globally, corporations' reputation has become more important than ever. A corporation's reputation consists not only of its *social image*, but also *financial, product* as well as *recruitment image*. Reputation is not separate from either employee or customer satisfaction, but rather a combination of all its stakeholders. The concern to a reputation crisis can come from different stakeholders such as consumers, governmental entities or from the general public (Greyser, 2009). In regard to Ikea's case, one of the reasons why their reputation could be at stake, might be the reason that Tomasz's expectations were not met. Furthermore, once the Ikea story became public, more stakeholders such as the government and customers could consider that their expectations of the company were not met either. Roper and Fill (2012) argue recovering from a tarnish in one's reputation is considered more difficult than just maintaining it. No matter how good one's reputation is, it will always be fragile. It is therefore important to have an active management of corporate reputation.

Before any communication programme is launched potential damage to the reputation should be considered. In this way, the corporate reputation will be purposely built. In addition, the most important stakeholders are the customers and employees where the latter ones can enhance or harm a brand through their behaviour and attitudes. Therefore, it is especially important that employees share the values and philosophy of the corporate brand since values are considered to constitute the key part of organizational reputation. As Roper and Fill (2012) say, "*Shared values between stakeholders will help to unify and strengthen a corporate brand (p. 29)*".

The corporate brand can be influenced by both internal and external forces where external can be described by the PESTEL-framework **Exhibit 3**. This framework can be especially relevant to include in the discussion of this case since many external forces were involved. The external forces that could be discussed and are applicable in the Ikea case, are political, economic, social and legal. Moreover, Roper and Fill (2012) explain internal forces such as a gap between employee behaviour and brand promise that could affect brand reputation for example. In Ikea's case, they believe that every person has the same value and that they treat every customer and employee equal, indifferent to which religion they belong to, who they love or which gender they identify themselves with. A firm's two key stakeholders are the consumers and the firm's employees.

A discussion here can arise regarding whether Ikea made the right decision to listen to the complaints from the other employees resulting in the decision to dismiss Tomasz K. This is relevant since the dismissal influenced other employees to resign as well as it affected some consumers' perception of Ikea.

Brand trust

In a corporate brand, the organisation itself becomes the focal point, including the employees, its policies, the activities and in particular its values. It is important that the values of a company are perceived as sincere since it can increase the authenticity of the brand and thus the brand's image. If a company is practicing what it is preaching, they will be rewarded by the consumers. By being a corporate brand, a company can highlight its values and activities in a way that is not achievable by simply concentrating on its products. Many brands are often considered to be an icon who taps into higher values. The brands who are considered an icon are aligned with social and political issues and the customers "vote" on issues through the company. Brands are today considered so essential that the customers vote for brands in the same way that they vote for political parties. It is therefore important that brands are considered to be transparent so that trust establishes between customers and the brands. Transparency can be divided into three core elements namely, honesty, fairness and openness. In the case of Ikea, the students can grade each of the core elements in order to analyse if Ikea has been transparent and built trust with its stakeholders (Roper & Fill, 2012).

Corporate brand identity

Brand identity and reputation are considered to be dependent on each other. While identity emphasizes the internal perspective, reputation focuses on the external perspective. The core of corporate brand identity can be described as the perceptions of the organisation and its management (Urde & Greyser, 2015). Brand identity is the first aspect to consider when aiming for a strong reputation. A possible gap between the brand identity and its image can cause damage to the brand. Therefore, a company needs to establish a strong brand identity. There is a strong relation between brand identity and corporate culture which requires employees to understand the identity and what it stands for (Roper & Fill, 2012).

In order to understand a corporation's brand identity, the corporate brand identity matrix (CBIM) can be applied. The matrix is a three by-three matrix which integrate nine elements within brand identity **Exhibit 4**. The elements are interrelated and together form a unified entity. A brand identity which is coherent should be reflected in the matrix where the core should mirror all elements and the elements should mirror the core (Urde & Greyser, 2015).

There is an importance to also create measurements in order to understand the linkage between brand identity and reputation and how different stakeholders view the organisation. Urde and Greyser (2015) have therefore provided the framework CBIRM **Exhibit 5**, which is an extension of the CBIM, which aims to outline the linkages between key elements of corporate brand identity and reputation. The framework helps to facilitate a coherent perspective of multiple stakeholders' perception of the brand and to which degree the internal identity matches the external perceptions (Urde & Greyser, 2015).

Overview of Key learnings

This case focuses on understanding the potential consequences that can be derived from companies that take an active stand, both for the corporate reputation and culture. The key learnings of this case focus on the importance of a consistent brand identity and an alignment with a company's actions in order to ensure a shared corporate culture. The following table illustrates an overview of the learning objectives in the case of Ikea.

| KEY LEARNINGS | | |
|-------------------|--|---|
| Remember | ... in a case of crisis, always stay true to the core values | <i>This case:</i> either support Tomasz K. or the offended employees |
| Understand | ... what consequences taking a stand and becoming more political can have for a company | <i>This case:</i> Ikea's support of LGBT+ movement, aiming to show openness and respect |
| Analyse | ... the importance of a shared corporate culture and a clear brand identity that is aligned to a corporation's actions | <i>This case:</i> Clashing values between Ikea and Poland |
| Evaluate | ... how to manage current employees that do not support or share the company's core values and actions | <i>This case:</i> Managerial decisions resulting in the dismissal of Tomasz K. |
| Create | ... a single channel of information when communicating with external stakeholders about an incident | <i>This case:</i> Several managers from different countries choose to comment the case |

Discussion questions:

The following questions are suggested for the instructor in order to structure the discussion and make it fruitful while engaging the participants. Moreover, it helps to achieve the key learnings that can be derived from this case.

Main question:

How should corporations determine what actions align with their core values and when should they respect the values of countries they operate in, without harming their brand identity?

Assisting questions:

- Which stakeholders are included/affected?
- How serious is the crisis? ‘
- What is special about this case?
- Do you think that Ikea was prepared for the crisis?
- Was the decision to fire Tomasz K. the right decision to make?
- Would the damage to Ikea's reputation and perceived authenticity have been smaller if they instead would have taken sides with Tomasz K.'s right to express his beliefs?
- Is it possible for Ikea to have acted differently in order to satisfy both parties?
- How do you think that a change towards a more active ideological stand can influence the current employees' relation to the brand?
- Do you consider that Ikea's culture is aligned with its core values?
- Do you think Ikea's identity changes when it starts to participate in LGBT events?
- To what extent should a corporate culture be successfully 'copied and pasted' into organisations in different countries?
- Do you think that Ikea can take for granted that their employees will consider their active stand as a part of their core values?
- What does this case say about the communication climate in Ikea, is it open or closed?
- To what extent do you believe that Ikeas reputation was affected by the scandal? (Considering both national or international level)
- How do you think this case can influence future potential employees' perception of Ikea as an employer brand?

Appropriate courses for this case

The case "*Ikea's clash between brand identity, ideologies and employees' values*" is applicable in several courses. In an era of increased brand activism, it is especially relevant to prepare and understand the potential obstacles that companies might face. It treats both the issue of crisis management, employer branding and human resources as well as communications. Moreover, a central issue in the case concerns country cultural differences. Therefore, it is considered that the case can fit within the following courses:

- Crisis management
 - *The whole case is based on a crisis where the existence of the company was threatened which makes it an especially relevant case within crisis management.*
- Reputational management
 - *Ikea's case created a lot of attention in the Polish society but also on an international level which makes the reputational aspect highly relevant.*
- Brand management
 - *The case concerns a corporate brand, Ikea, which means that the situation requires brand management interventions.*
- Organizational culture
 - *Several organizational questions are reflected in the case, such as the cultural clash between an employee's belief and the company's values.*
- Cross-cultural management/ Intercultural communications
 - *The case fits in the field of cross-cultural management since it concerns cultural clashes between country-culture and organizational culture.*
- Human resources management
 - *The case provides implications for organizational behaviour as well since it reflects how Ikea needed to deal with internal issues regarding employees' dissatisfaction.*

Teaching suggestions

This section provides the instructor with some guidelines on how to present the case and an example of a board-plan that can be used to facilitate the execution of the discussion in class. Additionally, a time plan is suggested in order to assure that the case can be presented and fulfilled in class within a given timeframe.

In order to be as prepared as possible, the instructor is initially proposed to use media such as the given PowerPoint presentation that is provided with the case, which will enhance the understanding of it by a visual illustration of the situation. Minor but important details such as making sure that all digital devices needed are working is suggested to avoid possible disruptions that can complicate the execution of the case presentation. For example, an adapter could be needed to assure that all devices will be compatible. Another suggestion is to make sure to be prepared and read through the case to optimize the presentation and make it as interesting and engaging as possible. It is essential that the instructor understands the case beforehand and analyses the different aspects which need to be considered. An additional preparation point could be to choose two or more questions to focus on if the time is somewhat limited. Besides a PowerPoint, the board is also a good tool to outline the key issues, alternatives and recommendations that will be derived from the participants during the discussion. It is additionally advised to present the corporate Brand Identity Matrix **Exhibit 4**, in the presentation to assure that the audience understands the different elements of the identity which later can be connected to the case. The emphasis in the CBIM in this case is mainly on the core, culture, relationship and personality. However, other aspects are still relevant in order to provide an overall picture of the organisation's identity since it plays an important role in the case.

To begin with, the instructor can assign different roles to the audience such as Ikea's management, general public or employees to increase the engagement. This should be followed by a presentation of the company that the crisis concerns which means a brief presentation of Ikea and its values, its relation with Poland and its engagement in the LGBT+ movement. Such a presentation provides the participants with an understanding of the underlying assumptions of the case as well as the importance of it. After a presentation of Ikea, the instructor should start to present the incident. After the incident the instructor can now present the extended version of CBIM, namely CBIRM **Exhibit 6**. Thereafter, a question should be posed on whether the audience has any additional questions before continuing to the general discussion.

Hereafter, the instructor's role is to lead the discussion by asking the chosen question and also suggesting some concepts or frameworks that can inspire the audience to elaborate on the questions. For example, as mentioned in the learning objectives, the concepts of form, style, timing and tone are suggestions on what the audience can discuss concerning Ikea's communication. Moreover, it is important to emphasize on the chosen questions as well as consider the whole audience and ensure

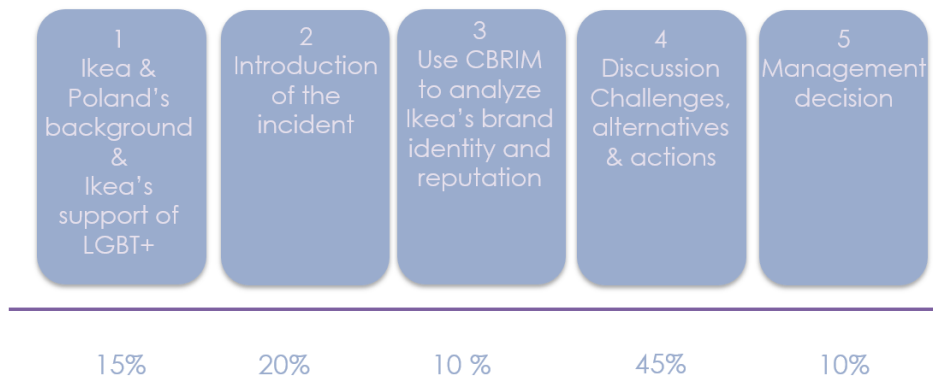
that the majority participates. Finally, when the discussion reaches its final stage it is time to vote and decide on a mutual decision.

This can be done by for example asking questions where the audience needs to take a stand, by raising their hands. In the end, the audience can obtain the real management decision and has the possibility to elaborate on what the company could have done better and what they agree on.

Time plan

To complement the teaching decisions, a time plan is provided with the purpose of helping the instructor to estimate the time. Actual time spent on each section may vary depending on the discussion, however, the following time plan ensures that all sections of the case are examined throughout the fixed time frame. The time plan is based on percentages. A two hour presentation time frame would result in having 18 minutes to present Ikea & Poland's background as well as Ikea's support of LGBT+, 24 minutes to introduce the incident, 12 minutes to analyse the damage of the brand's identity and reputation, 48 minutes to discuss Ikea's challenges, alternatives and actions and lastly 12 minutes to discuss their management decision **Table 1**.

Table 1 Time plan



Board plan

A pre-prepared structure has been arranged to organize the main discussion points of the case. We suggest using an approach in which the participants can detect the potential problems of the case, discuss different alternatives to finally conclude the recommended actions **Table 2**.

Table 2 Board plan



Epilogue

Understanding what consequences taking a stand and becoming more political can have for a company is in this case essential and an important key learning. Further, the case also covers the dilemma of a clash between a corporate culture and the country's culture in which it operates in and the potential effects it can have on reputation. This can be examined from different perspectives, both from a managerial perspective as well as from an employee or a governmental perspective. An additional important learning concerns communication and what can happen to the company when it is not in charge of the narrative in the media. What would have happened if Tomasz K. would not have been the first who talked to the press about the issue? Would the news reports have been the same or would Ikea be able to control the newsfeed and the framing of the incident?

It can also be questioned whether Ikea had efficient internal and external communication channels, in what way stakeholders perceive Ikea and if their actions are aligned with its corporate culture. Finally, the case concerns an important ethical dilemma which is how to handle current employees in a situation where a company decides to actively engage in ideological and political questions meanwhile employees do not agree with such actions.

Reflection

This management decision case has been a part of the master course, BUSN35 Corporate Brand Management and Reputation, at Lund University. The class was divided into groups of three where each group needed to write an academic case which should be based on a real-life managerial problem. The case is written in a way which leads to questions that require an assessment, an analysis and a decision reached by the participants of the case. With some guidance from professor Mats Urde, the decision was to write about Ikea and their choice to dismiss an employee in Poland.

As a group we started off with several meetings in order to gather all the information we could find and familiarize with what has happened from start to finish. The struggle during this stage was to find extensive information of the incident in order to give us a more comprehensible picture of what actually had happened. Since the incident concerned Poland, a lot of the information was thus in polish which could have been a possible obstacle. However, one of the group members is polish-speaking which facilitated translation of the information given from both Ikea as well as the news. Furthermore, since the matter is still ongoing, it also contributes to the fact that it becomes difficult to get a comprehensive picture of the situation. We did however continuously find information throughout the writing process which helped the case to become more nuanced and informative. One example is that we came in contact with an employee from Ikea's communication department who provided us with valuable and specific information regarding Ikea's engagement in the LGBT+ movement.

When writing the teaching notes, we had the opportunity to be very free and creative, which was highly appreciated. This also resulted in a lot of responsibility since we needed to determine what could be considered as relevant for the teaching notes which was seen as a challenge since we were not accustomed to this type of learning process. It was however very appreciated because it forced us to analyse and reflect in new ways and therefore obtain new perspectives. To write a management decision case has overall been very interesting since it was open for creativity and is different from other academic assignments. Furthermore, the fact that it has reflected real life situations that corporations and managements need to address has made it more fascinating leading to our optimal engagement in the process.

Appendix

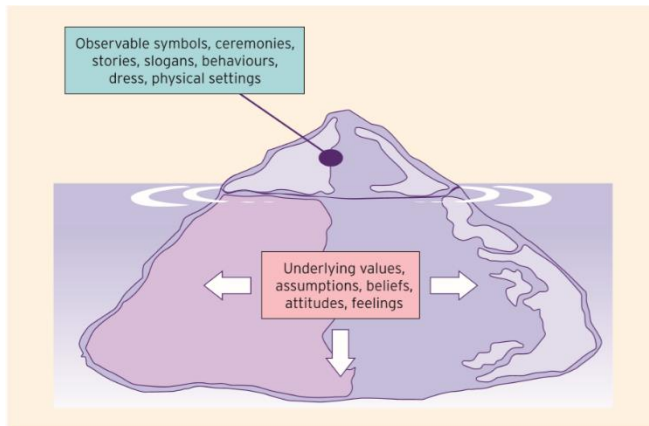


Exhibit 1. The iceberg metaphor (Roper & Fill, 2012, pp. 57)

| Characteristic | Model | | | |
|--|---------------------------------------|---|------------------------------------|--|
| | Press agency/publicity | Public information | Two-way asymmetric | Two-way symmetric |
| Purpose | Propaganda | Dissemination of information | Scientific persuasion | Mutual understanding |
| Nature of communication | One way; complete truth not essential | One way; truth important | Two way; imbalanced effects | Two way; balanced effects |
| Communication model | Source → Rec.* | Source → Rec.* | Source ↔ Rec.* Feedback | Group ↔ Group |
| Nature of research | Little; 'counting house' | Little; readability, readership | Formative; evaluative of attitudes | Formative; evaluative of understanding |
| Leading historical figures | P.T. Barnum | Ivy Lee | Edward L. Bernays | Bernays, educators, professional leaders |
| Where practised today | Sports, theatre, product promotion | Government, not-for-profit associations, business | Competitive business, agencies | Regulated business, agencies |
| Estimated percentage of organisations practising today | 15% | 50% | 20% | 15% |

Exhibit 2. The four models for communication (Roper & Fill, 2012, pp. 247)



Exhibit 3. The PESTEL framework

| | | |
|---|---|---|
| <p>VALUE PROPOSITION</p> <p><i>Well-designed furniture to an affordable price</i></p> | <p>RELATIONSHIP</p> <p><i>"Love is complicated, Ikea is not" Open for everyone</i></p> | <p>POSITION</p> <p><i>To be the most affordable furniture company and fit any style and budget</i></p> |
| <p>EXPRESSION</p> <p><i>Blue & yellow logo, Swedish names, meatballs</i></p> | <p>BRAND CORE</p> <p><i>"To create a better everyday life for the many people"</i></p> | <p>PERSONALITY</p> <p><i>Simple, sincere, down-to-earth, inclusive, caring</i></p> |
| <p>MISSION & VISION</p> <p><i>"to offer a wide range of well-designed, functional home furnishing products at prices so low that as many people as possible will be able to afford them"</i></p> | <p>CULTURE</p> <p><i>Togetherness, respect, willpower & creativity</i></p> | <p>COMPETENCES</p> <p><i>Cost-efficient, innovative, creative</i></p> |

Exhibit 4. The Corporate Brand Identity Matrix (Urde, 2013)

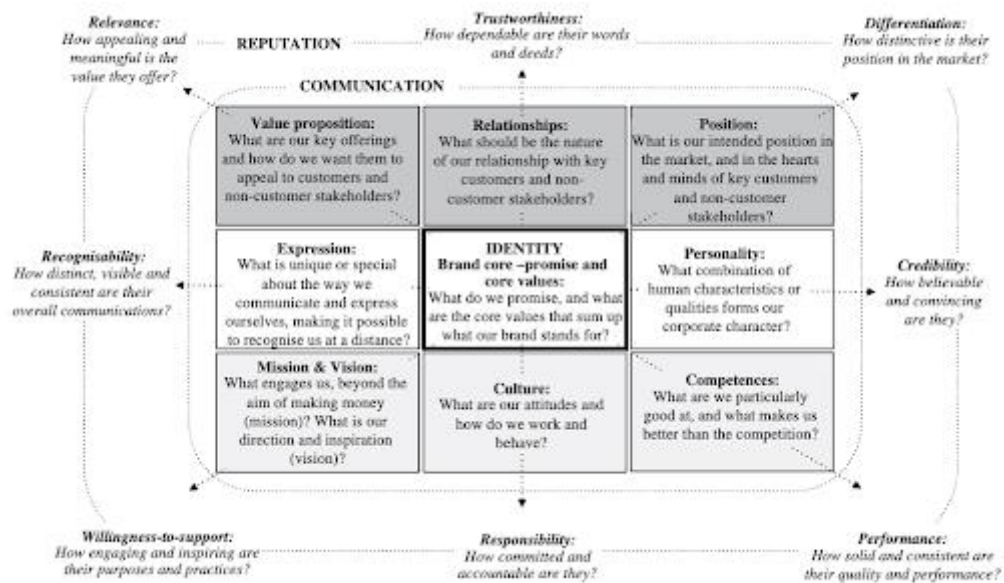


Exhibit 5. The Corporate Brand Identity and Reputation Matrix (CBIRM). (Urde & Greyser, 2015)

| | | | | |
|-----------------|--|--|--|-------------|
| | Relevance | Trustworthiness | Differentiation | |
| Recognisability | VALUE PROPOSITION <i>Well-designed furniture to an affordable price</i> | RELATIONSHIP <i>"Love is complicated, Ikea is not"</i> <i>Open for everyone</i> | POSITION <i>To be the most affordable furniture company and fit any style and budget</i> | Credibility |
| | EXPRESSION <i>Blue & yellow logo, Swedish names, meatballs</i> | BRAND CORE <i>"To create a better everyday life for the many people"</i> | PERSONALITY <i>Simple, sincere, down-to-earth, inclusive, caring</i> | |
| | MISSION & VISION <i>"to offer a wide range of well-designed, functional home furnishing products at prices so low that as many people as possible will be able to afford them"</i> | CULTURE <i>Togetherness, respect, willpower & creativity</i> | COMPETENCES <i>Cost-efficient, innovative, creative</i> | |
| | Willingness-to-support | Responsibility | Performance | |

Exhibit 6. The Corporate Brand Identity and Reputation matrix (Ikea) (Greyser & Urde, 2015)

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