



Photo: The Clan Mackenzie Society of Scotland and the UK (CMSSUK) Facebook

## Exploring heritage and social identity in relation to Clan Societies

The Clan Mackenzie Society of Scotland and the UK case

### Executive Summary

A social identity approach in consumer behaviour refers to the frame of reference customers have to make consumption decisions based on who they are or want to be. Using a social identity approach is valuable when researching consumer behaviour from a marketing viewpoint because it gives organisations insights to understand their targets better and develop products and services to satisfy their needs.

Since heritage provides a platform for identity performance, this research aims to explore the role heritage plays in constructing Millennials and Gen Z social identity and if that influence is enough to motivate a consumption decision. Consumption decisions can include purchasing physical goods (e.g., grocery shopping), services (e.g., banking) or experiences like joining a clan society.

This research was developed in collaboration with the Clan Mackenzie Society of Scotland and the UK (CMSSUK), a Scottish NGO that promotes and protects the interest in the clan's history and heritage. The CMSSUK was interested in

understanding if young people would be interested in joining them to connect with their heritage. Therefore, this research focused on understanding Millennials and Gen Z insights about their heritage and if they would be interested in joining the CMSSUK by interviewing a group of 14 young Mackenzie in July 2022.

The results suggest that personal experiences and an innate curiosity define the perceptions about heritage. In the case of CMSSUK, the findings indicate that it is not enough to have the Mackenzie surname to want to join the organisation. For some people, it is not appealing because they do not have the interest or because joining the Clan Mackenzie society is not aligned with how they think of themselves or want to be perceived.

For people that showed some interest, joining the CMSSUK would give them access to a community and knowledge about their heritage that they could not obtain otherwise. People might need to make the conscious choice of joining based on how they define themselves and analyse if the benefits of joining would give them some answers in their quest for identity and a sense of belonging. This study also provides actionable recommendations based on the findings to attract interested young people.

### POLICY BRIEF

#### KEY RECOMMENDATIONS

- Create marketing communications initiatives highlighting the benefits of membership for potential members.
- Promote the CMSSUK as a platform for networking and volunteer work to draw in the young people eager to make contacts for their future employability and experience on their resume.
- Identify critical occasions throughout the year highlighting the Scottishness and belonging to the clan society that might improve identification for new members.
- Examine if the existing value proposition of CMSSUK aligns with the aspirations and objectives of young people.
- To enable potential young members to make an informed choice about whether to join the CMSSUK, the advantages of belonging to a clan society must be established and matched to their social identities.

## Introduction

Identity is a concept used daily to describe people's existence as distinct individuals in the world and to situate themselves concerning other individuals and objects in their environment (Augoustinos, 2014). People have various identities because they play multiple roles and belong to various groups since they live within a social structure (Burke and Stets, 2009). Those identities might influence people's consumption decisions (Reed II, 2002).

One of those identities is often determined in part by birth and/or citizenship in nation-states. People come together in a nation by combining common interests and heritage (Kaplan, 2009). Anything a person wants to preserve or accumulate and pass on to future generations might be considered heritage (Howard, 2003). Heritage can construct and promote a story of singularity, resemblance, and unity that communicates a particular version of identity in the public sphere (Anico, 2009). Therefore, there is a connection between the construction of identity and the understanding of a person or country's heritage.

To connect with heritage in the quest for identity, people can perform a series of heritage-related activities like working on their family trees, preserving old pictures and heirlooms, or joining communities that aim to preserve a specific heritage. Clan societies are a type of heritage-related community.

The equivalent of a Scottish Clan in modern life is a clan society, a social organisation, a voluntarily organised group of people with a shared history and heritage (Ray, 2001). These organisations tend to have a mature membership which raises the question of whether young people are interested in joining them as part of their heritage or if it is not relevant in constructing their identities.



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This research aimed to explore the role that heritage plays in constructing Millennials and Gen Z social identity and if that influence is enough to motivate

young people to join a clan society. In response to the gaps identified in the literature, this study had the following research questions (RQ):

- RQ1: How do Millennials and Gen Z's social activities shape their social identity?
- RQ2: How do Millennials and Gen Z feel and think about their heritage?
- RQ3: How do Millennials and Gen Z engage in heritage-related activities to construct their social identity?
- RQ4: How does being part of a Clan Society, as a specific heritage-related activity, contribute to building Millennials and Gen Z social identity?

This study contributes to the body of knowledge on consumer behaviour by incorporating a better understanding of Millennial and Gen Z consumers' perspectives based on their insights about heritage and helping to identify the impact of heritage in their social identity construction. This research could help marketers in heritage-related industries and the CMSSUK target and communicate effectively with these consumers. This knowledge can help clan societies develop strategies to promote their organisations and attract new young members, which is vital for sustainability.

## Methodology

This research followed a qualitative case study approach. A case study strategy can generate insights from intensive and in-depth research into the study of a phenomenon in its real-life context, leading to detailed, empirical descriptions and theory development (Yin 2018).

In case studies, sample sizes are typically small. For this case study 7 millennials and 7 Gen Z with the Mackenzie (or spelling variations) surname were recruited. It is worth noting that there were three participants in the group of millennials that are also members of the CMSSUK. Most participants were from the UK, but there were two participants from overseas, one from the USA and one from New Zealand, countries in which CMSSUK also has a presence.

For this research, millennials are people born between 1981 and 1996, and Gen Z is born between 1997 and 2012 (Dimock, 2019; Beresford Research, 2022). Recruitment took place via the university email of the researcher. The inclusion criteria for participation included having the Mackenzie surname on their families' paternal or maternal side. Prior to participation, all respondents were given a participant information sheet explaining the study and privacy notice, and all signed an informed consent form before proceeding to the online interviews. This research was approved by the University of Glasgow College of Social Sciences Ethics Committee.

To obtain the data, semi-structured interviews were used because this type of technique helps by suggesting explanations (answering "how" questions) and providing insights reflecting participants' perspectives (Yin, 2018). This research generated verbal data from speech that was audio recorded from the Zoom interviews developed in July 2022. The interviews were transcribed, and the data was analysed using thematic analysis (TA). *"TA is a method for developing, analysing and interpreting patterns across a qualitative data set, which involves systematic processes of data coding to develop themes"* (Braun and Clarke, 2022, p. 4).

## Key Results and Findings

This section addresses the research aim to explore the role heritage plays in constructing Millennials and Gen Z social identity in the context of clan societies, specifically the CMSSUK, by answering the four research questions (RQ).

### **RQ1: How do Millennials and Gen Z's social activities shape their social identity?**

The findings suggests that young people have multiple identities derived from their roles (students, workers, sportspersons, friends), and belonging to different groups could not be attributed only to the construction of their social identity. This belonging could also have other drivers like future employability when students finishing university join clubs or societies for networking and their CV. Alternatively, socialising in the case of sports as a social platform, not only to stay fit but to meet new people and to develop a support network to help and be helped if necessary.

This study also identified the opposite effect when young people stop their memberships in certain groups, reshaping their social identity. This might happen when the groups are not accessible when academic/work commitments become a priority in their lives and when other personal reasons make people reflect on how being part of a group is affecting their overall life.

Finally, social activities also help young people to establish social support networks. Having these connections with friends has a double impact, people can look for help in the network, but they can also help other members contributing positively to members' well-being.

### **RQ2: How do Millennials and Gen Z feel and think about their heritage?**

An important issue that emerged from the data was that young people's interpretation and feelings toward heritage depend on each perspective and previous heritage experiences. There is also a family influence in

the way young people create their perception of heritage. For some young people, heritage is an unfamiliar word because it might not be used regularly. In contrast, heritage is a closer concept for others who grew up listening to their parents and grandparents' stories.

Another highlight is the probable link between having studied history at university with a broader and more profound interpretation of heritage versus someone that has not studied this topic. Finally, some young people can understand heritage as a justification for their present lives without making a connection to the impact of heritage on their future.

### **RQ3: How do Millennials and Gen Z engage in heritage-related activities to construct their social identity?**

This research agrees with McDonald's (2011) theory on heritage-related activities involvement to explain how young people engage in heritage-related activities but adds two additional perspectives. In the case of internal engagement<sup>1</sup>, even if the person has a strong interest in developing a heritage-related activity, external factors can frustrate the execution of those activities, such as lack of support or money. In the case of external engagement<sup>2</sup>, even if the stimulus to develop a heritage-related activity is strong, people need to have a slight curiosity or interest in heritage, like fertile ground, for the stimulus to trigger the action effectively.

This study also highlighted the social nature of heritage-related activities that helped some participants feel more connected to their families. Being a family member might also be considered one of the multiple roles people have that contribute to their social identity.

### **RQ4: How does being part of a Clan Society, as a specific heritage-related activity, contribute to building Millennials and Gen Z social identity?**

Joining a clan society is a personal choice that relates to how people perceive themselves and how they want to be perceived by others. For some people, it is not appealing because they do not have the interest or because joining the Clan Mackenzie society is not aligned with how they think of themselves or want to be perceived. For others, it will give them access to a community and knowledge about their heritage they could not obtain otherwise, which is necessary to define who they are.

<sup>1</sup> Internal engagement starts with a strong personal connection that triggers peoples' need to seek out heritage related to their interests (e.g., family history or interest in architecture).

<sup>2</sup> External engagement is when people interact with a heritage element without previous interest (e.g., taking a foreign friend on a tour to a heritage place); the interaction is positive and enjoyed, so this can trigger personal connection and higher involvement.

After giving the non-members a brief context of the aims of the CMSSUK, they were asked if they would like to join the society in the future. The answers are detailed in Figure 1.



Figure 1. Reason to join or not the CMSSUK

The reasons for not joining the CMSSUK were lack of interest, time, and not being old enough, emphasising the idea that clan societies are not made for young people. Contrastingly, the reason for becoming members included joining the clan society as part of their identity and thinking about the Clan Mackenzie as an extended family.

A quote mentioned by Louis (a CMSSUK member) captures the essence of deciding whether to join a clan society and the repercussions on people's identity:

*"I think identity is defined by the individuals involved. So, I know our heritage and history plays a part in that...But really is, is a lot of that's related to the individuals themselves and what they're looking for. And for some people, Clan Mackenzie provides the answer, and for some it won't."* – Louis, 34



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## Recommendations

Based on this research findings and using Reed II's (2002) four factors to formulate a social identity-based

theory of consumption, the CMSSUK could develop these initiatives to attract new young members:

1. To encourage **salience**<sup>3</sup>, CMSSUK could develop marketing communications campaigns based on how belonging to the society can help potential members' current social identity. CMSSUK could also be promoted as a platform for networking or even volunteering that might attract the youngest craving to develop connections for future employability and include work experience in their CV.
2. To promote **self-importance**<sup>4</sup>, CMSSUK could identify special dates during the year where being Scottish and a member of the clan society might increase identification for potential members (e.g., Highland games, St Andrew's Day, Burns Night). It is necessary to acknowledge that some young people might feel they are not generationally ready to join, but these events could generate awareness for the future.
3. To understand the **relevance**<sup>5</sup> the society might have for potential young members is necessary to analyse how CMSSUK's current value proposition<sup>6</sup> might align with young people's dreams and goals as part of their social identities. Having one package of benefits for all members may not be attractive enough to attract new members, so personalisation of the benefits based on the current and potential member's stages of life is essential.
4. Since social identities help people develop an **evaluative diagnosis**<sup>7</sup> of the decisions they make, including consumption, the benefits of becoming a clan society member need to be established and aligned to potential young members' social identities to allow them to take an informed decision about joining or not the CMSSUK.

<sup>3</sup> Salience is the extent to which social identity is activated in a consumer's mind when thinking about his/her self-concepts that can trigger consumer decision-making and behaviours related to the social identity.

<sup>4</sup> Self-importance means that a consumer must identify with a particular social identity at a specific time related to consumption because salience alone is not enough to influence a consumption decision.

<sup>5</sup> Relevance refers to the fact that a specific social identity must be relevant to the product or service that will be evaluated prior to its consumption, but this relevance can be affected by the context of the consumer (e.g., dreams, goals, concerns).

<sup>6</sup> A value proposition is an organisation's promise that outlines what makes a company's product or service appealing, why a consumer should acquire it, and how the product or service's value differs from comparable offerings.

<sup>7</sup> The evaluatively diagnostic is the degree to which the evaluative content of the social identity is clear and specific enough to inform the consumer's evaluation of the product or service and trigger a behavioural response towards consumption.

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