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# **Family Firm Succession in Tourism and Hospitality: An Ethnographic Case Study Approach**

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## **Structured Abstract**

**Purpose** - Grounded in stewardship theory, this study explores the motives, actions, and meanings of multiple stakeholders involved in an inter-family hospitality family firm succession.

**Design/Methodology/Approach** - A longitudinal, ethnographic case study approach collects data from 15 in-depth interviews, one year of observation and a one-month on-site internship.

**Findings** - Results show that a well-defined succession plan and the active involvement of the successor/s in the succession process would foster a strong stewardship commitment to the family business. Moreover, a clear and open communication strategy is required to strategically manage rivalry and competition among potential successors during an inter-family succession.

**Originality** - The succession process of family firms remains an intensely discussed phenomenon, and despite its importance to the tourism and hospitality industry, the intersection between tourism and hospitality and family business literature is sparse. Notably, the tourism and hospitality literature lacks a multiple stakeholder perspective to holistically capture the motives, actions, and meanings of numerous stakeholders involved in an inter-family succession.

**Keywords:** succession; ethnographic; case study; family business; stewardship theory; hospitality

**Article Classification:** Research paper

## **1. Introduction**

Tourism and hospitality is a socio-economic phenomenon (Mariani & Baggio, 2020) dominated by family businesses that are of critical importance in enhancing the competitive positioning of a destination (Arcese et al., 2020; López-Chávez et al., 2020). In a family business, the transition of ownership and management from one generation to the next poses significant challenges and is riddled with risks and set-backs (Leiß & Zehrer, 2018). Many family firms in the tourism and hospitality industry struggle to survive beyond the first generation due to a lack of clear succession plans, resulting in significant interpersonal struggles among family members, deteriorating business and family relationships (Arcese et al., 2020; López-Chávez et al., 2020). As such, a successful inter-family succession remains a dynamic and complex process (Muñoz-Bullon et al., 2017) despite being a critical factor to the growth and development of a family firm. Research concerning family business has long recognized these challenges, and consequently, a growing body of literature has emerged on the factors influencing inter-family succession (Porfirio et al., 2020; Schlömer-Laufen & Rauch, 2020).

Although the extant literature on family business provides significant insights into the factors influencing the succession process (Cisneros et al., 2018; Schlömer-Laufen & Rauch, 2020), most of these studies have been predominantly studied through a unidimensional perspective focusing on only the incumbent, successor, or non-family employees (Bozer et al., 2017). However, family businesses involve multiple stakeholder groups (Cisneros et al., 2018; Porfirio et al., 2020); thus, a more practical understanding of inter-family succession calls for a comprehensive framework assimilating various stakeholder perspectives (Bozer et al., 2017). More specifically, although family businesses are more widespread in the tourism and hospitality industry, the interaction between tourism and hospitality and family business literature is sparse (Arcese et al., 2020; López-Chávez et al., 2020). Understanding family business in general (Kallmuenzer & Peters, 2018) and family business succession, in particular

(López-Chávez et al., 2020), is not widespread enough in the tourism and hospitality sector. Consequently, there is a compelling need for an explanatory framework that holistically captures the motives, actions, and meanings of multiple stakeholders involved in an inter-family succession in the tourism and hospitality sector.

In this paper, we seek to provide considerable insights into the role of multiple stakeholder groups involved in an inter-family succession of a hospitality family firm concerning four key stakeholders, including the incumbent, successor, family, and non-family employees. To do so, empirically, we draw on an in-depth longitudinal, ethnographic case study of a first-generation family-owned four-star hotel in Western Austria undergoing succession from the first generation to the second. We draw on interview findings and ethnographic observations of family members, non-family employees, and an independent consultant in understanding the complex ensemble of multiple stakeholder groups involved in the succession preceding and aftermath.

Our paper contributes to the extant tourism and hospitality and family business literature in three distinctive ways. First, we merge tourism and hospitality and family business literature by highlighting the relevance of family business in the economic structure of the tourism and hospitality sector. Second, in line with the stewardship theory, we provide a thick holistic description of the motives, actions, and meanings of multiple stakeholder groups involved in an inter-family succession concerning pre-, during, and post-succession phases, which has mostly been ignored in the family business and tourism and hospitality literature. Third, we provide significant insights into how a family business in the hospitality industry can strategically manage rivalry and competition among potential successors during an inter-family succession.

## **2. Theoretical Background**

### ***2.1. Family Firms in the Tourism and Hospitality Industry***

A family firm represents a unique institution that blends two social institutions: family (including members related by blood or marriage) and business into a single unit (Bigliardi & Dormio, 2009). Family businesses are widespread around the globe and play a pivotal role in almost every industry (Polat, 2020). However, the literature indicates that family firms tend to have a significant variation in financial performance compared to non-family firms (Ratten et al., 2021). This is mainly due to the peculiar trait of family firm management, which reflects the dynamic interplay between founders' values, firm legacy, and firm management policies (Polat, 2020; Ratten et al., 2021). Consequently, most scholars on family firms propose the socio-emotional wealth (SEW) approach and regard it as a key concept in family business research (Berrone et al., 2012; Ratten et al., 2021). SEW is a broad construct encompassing various non-financial aspects of family firms that meet the family's emotional needs, including family identity and reputation, family culture, and binding social ties (Berrone et al., 2012).

Family firms dominate the tourism and hospitality industries worldwide as it is characterized as an industry that demands a high degree of guest–host interactions (Getz & Carlsen, 2005; Kallmuenzer et al., 2019). The extant literature on managing family businesses in the tourism and hospitality industry mainly draws on their small firm size (Getz & Carlsen, 2005), rural nature and sustainable business practices (Kallmuenzer et al., 2018), social ties with the local community (Baggio & Valeri, 2020; Peters & Kallmuenzer, 2018; Pikkemaat & Zehrer, 2016), and cyclical demand fluctuations resulting from the seasonality nature of the business (Magnini, 2009). These unique characteristics provide numerous opportunities and challenges for these family businesses to survive and thrive, often embodying direct and flexible host-guest interactions (Elmo et al., 2020; Getz & Carlsen, 2005; Peters & Kallmuenzer, 2018).

## ***2.2. Succession in Family Firms***

Business succession is a process, not an event (Ferrari, 2021). It goes through several distinct phases including initiation, integration, joint reign and then withdrawal (Ferrari, 2021; Le Breton-Miller et al., 2004). Unique characteristics of a family business, such as informal rules and procedures, lack of clear communication structures, and informal decision-making structures, have made its succession process different from non-family business in significant ways (Dalpiaz et al., 2014). The succession in a family business is often a complex and long-lasting process involving transferring ownership and management from one generation to another compared to a more formal and task-oriented approach used in non-family firms (De Massis et al., 2008; Le Breton-Miller et al., 2004; Otten-Pappas, 2013). Moreover, in most instances, inter-generation succession presents a precarious time of change for a family firm (Le Breton-Miller et al., 2004) as founders are most likely to expect the next generation to protect their legacy.

Over the years, the escalated growth of research on family firms emphasized that succession planning is essential in ensuring the longevity of family firms (Schlömer-Laufen & Rauch, 2020; Teixeira et al., 2020) and family firms in the tourism and hospitality industry are not an exception (Kallmuenzer & Peters, 2018). The founder plays a critical role in determining whether succession is adequately planned and executed (LeCounte, 2020). Extant literature on family business reveals that succession plans in most family firms are highly informal, lacking a systematic approach (Teixeira et al., 2020). Many founders resist succession planning that increases the chances of the business failing shortly after the founder's exit (Nwuke et al., 2020). Moreover, succession planning in family firms is a highly emotional issue, leading to significant rifts among the family members and non-family employees and, in some cases, causing the demise of the business (Nwuke et al., 2020; Teixeira et al., 2020). However, to uphold cohesiveness among family members and non-family employees, a family firm must

develop a systematic and comprehensive planning process that provides a clear structure for transferring ownership and management from one generation to another (Matias & Franco, 2020). Such an approach allows the succeeding generation to gain additional legitimacy minimizing conflicts.

### ***2.3. The Succession Planning Process***

The succession planning process of a family firm typically begins by identifying key personnel who may need replacing in few years down the line (Morris et al., 1996). Accordingly, it is essential to identify the skills, competencies, and characteristics expected from a potential successor. Such an analysis allows the management to designate the successor among the potential pool of talent.

Extant literature on family business succession reveals that several individual and business-related factors influence successful inter-family succession (Porfirio et al., 2020). Some of the most cited individual factors include the incumbent's level of education, exposure to external experience, and willingness to relinquish his/her role in the business (Morris et al., 1996; Porfirio et al., 2020). Moreover, the successor's age, gender, and commitment towards the family business also influence the inter-family succession (Daspit et al., 2016). Besides, family business culture, family history, management and ownership structure, and leadership style are cited as determinants of inter-family succession (De Massis et al., 2008). Although family firms play a dominant role in the tourism and hospitality industry, surprisingly, family firm succession has received scant scholarly attention in tourism and hospitality literature (López-Chávez et al., 2020). Thus, industry-specific factors that may influence inter-family succession in family firms in the hospitality industry are not apparent in extant literature.

In summary, our extensive literature review suggests most studies on inter-family succession typically focused on individual and business-related factors influencing the



succession process based on single-source analysis, usually from the management perspective (Bozer et al., 2017; Schlömer-Laufen & Rauch, 2020). A lacuna of studies focuses on the multi-stakeholder perspective in understanding the inter-family succession process in family firms (Daspit et al., 2016; Bozer et al., 2017). Moreover, the interaction between tourism and hospitality and family business literature is meager (Arcese et al., 2020; López-Chávez et al., 2020). This apparent chaos may be attributed to gaps in our understanding of the inter-family succession process of family firms in the tourism and hospitality sector, particularly concerning motives, actions, and meanings of multiple stakeholders involved. As such, we selected the stewardship theory as the most suitable overarching theoretical framework in exploring the role of various stakeholder groups involved in an inter-family succession focusing on a first-generation family-owned four-star hotel in Western Austria undergoing succession from the first generation to the second.

#### ***2.4. Stewardship Theory***

Stewardship theory was introduced as a normative alternative to agency theory to describe family firm behavior (Davis et al., 1997b). While the agency theory depicts a principal-agent relationship within family firms where both parties are viewed as pure utility maximizers (Löhde et al., 2021), stewardship theory propels a divergent viewpoint by characterizing more humanistic relationships among employees (Chrisman, 2019). It assumes that individuals strive to fulfill higher-order needs through pro-organizational behavior, naturally aligning their interests with those of others in the organization (Chen et al., 2016; Davis et al., 1997a). Moreover, it acknowledges family firm managers act less like self-interested agents and more like organizational stewards (Chrisman, 2019), thus maximize the business performance of their firms through fostering citizenship behaviors (Davis et al., 1997a).

As implied in the stewardship theory, pro-organizational behaviors and a shared sense of responsibility toward the business inspire family business founders to pursue steady growth and contribute to the long-term success of the business (Madison et al., 2016).

Founding managers of family firms likely have a high degree of stewardship because they care deeply about the long-term prospects of their business and the family's legacy, reputation, and future (Miller et al., 2008). Stewardship theory posits family business founders as farsighted stewards who generate benefits to all stakeholders involved in a family firm (Eddleston & Kellermanns, 2007). Since family business founders often share similar values with the firm and enjoy longer tenures than non-family business managers, they provide a firm with stability, developing lasting relationships with all stakeholders involved, thus sustain business networks (Madison et al., 2016). In this vein, when family firm founders want to select a family heir for inter-family succession, stewardship perspective of the potential incumbents is the most important concern (Chen et al., 2016).

From a stewardship standpoint, because tourism and hospitality are labor and capital-intensive industries, family company managers in this industry must display a high level of stewardship behavior to assist firms in confronting challenging circumstances and contributing to improved performance (Song et al., 2017; Torres & Augusto, 2021). Handling inter-family succession implies forming a clear future-oriented plan that involves numerous cognitive and social challenges (Porfirio et al., 2020). Given these complexities and unique traits in the inter-family succession process and tourism and hospitality setting, our comprehensive literature review reveals that the most suitable approach for this paper is the stewardship theory.

### **3. Research Design**

#### ***3.1. Case Study Research***

Our research paper takes a naturalistic inquiry approach to explore the motives, actions, and meanings of multiple stakeholder groups involved in inter-family succession preceding and

aftermath through the use of a longitudinal, ethnographic case study (Gamage et al., 2021; Yin, 2013). A qualitative approach is selected as this paper addresses a “sensitive” issue, which cannot be easily captured through quantification (Gibbs, 2007). Instead, a qualitative research approach is required for describing and explaining the phenomena involved in this paper “from the inside” in its naturalistic setting (Tajeddini, 2013; Yin, 2013). Single-case studies taking longitudinal perspectives have played a critical role in family business (see, e.g., Magistretti et al., 2019; Vincent Ponroy et al., 2020) and tourism and hospitality (see, e.g., Mariani & Baggio, 2020; Warren et al., 2018) literature lately. Such a perspective allows understanding the complex ensemble of emotions, motives, and actions associated with an inter-family succession process in-depth (Eisenhardt, 1989; Yin, 2013).

As such, to explore the motives, actions, and meanings of multiple stakeholder groups involved in the inter-family succession process, we deliberately choose a 4-star hotel located in the mountainous Arlberg region in Western Austria that met the exact selection criteria set by Nordqvist and Zellweger (2010) in identifying a family firm. To begin with, the business had to be owned by a family holding more than 50 percent of the total ownership and being involved in the top management. Next, family members of more than one generation need to be actively involved in the firm’s routine business activities. Finally, the firm's current control had to be in the hands of first- or second-generation family members. The Arlberg region, which is known as ‘the cradle of alpine skiing’ was selected as the context of this paper. This region connects the rural provinces of Tyrol and Vorarlberg with nearly 1,200,000 inhabitants and 12,000 hospitality firms active in several winter sport destinations and is dominated by family firms (Dörflinger et al., 2013).

Additionally, the suitability of the hotel in conducting a longitudinal, ethnographic study, including the ability to pay multiple visits over a time span of one year, conduct meetings, and engage work with employees on-site, was also assessed. It was essential to regularly meet

the family members and non-family employees and observe how they engage in their routine business activities to better understand the hotel's sociocultural milieu (Fitz-Koch & Nordqvist, 2017). Further aspects that turned up this hotel into an ideal context are that it underwent a succession process during the time of data collection; thus, we could observe current and changing dynamics associated with the process. Furthermore, one author got an opportunity to complete a one-month internship program at the hotel, which allows obtaining hands-on experiences in how the hotel is managed during the succession.

The selected hotel is a 100% family-owned hotel run by a family employing 15 non-family employees and five family members, representing both first and second generations. It was started as a boutique hotel in 1979, and today, the first and second generations of the family, including the founders, actively runs the business. From a legal perspective, the first generation, represented by the mother and father of the family, owns the hotel during the time of data collection.

### ***3.2. Data Collection***

Primary data of this paper were collected by using a multiplicity of data collection methods, including semi-structured interviews, casual conversations, and ethnographic observations. An assortment of data collection methods allows comprehending multifaceted and complex ensembles of motives, actions, and meanings of multiple stakeholder groups involved in the inter-family succession process (Creswell, 2014).

Fifteen semi-structured interviews were conducted with family members, non-family employees, and an independent consultant to explore how the succession process influences their motives and actions (see Table 1 for the interviewees' profile). We used snowball sampling in selecting the interviewees and conducted multiple interviews with the same person if necessary and/or desired. To conduct interviews, we first contacted the founders of the hotel. Then they provided us the names of other respondents, including family and non-family

employees involved in the succession process. All the interviewees were actively or passively involved in the succession process and could explain the inter-family succession process from multiple stakeholder perspectives. Since there are no precise guidelines for the sample size to be considered in a case study research, we adopted the theoretical saturation strategy recommended by Eisenhardt (1989) in determining the sample size. As such, the interview process continued until we reached theoretical saturation. Theoretical saturation occurs when the same ideas repeatedly manifest with no new ideas emerge (Eisenhardt, 1989).

The interviews were conducted over seven months, from November 2017 to June 2018. In line with the recommendations of Eisenhardt (1989), to control for interviewer bias, the first three interviews were conducted by two authors together. Afterward, each interview was conducted individually by the authors. All the interviews were conducted at the family's dining table, often with coffee and cake. Such an informal approach allows us to get an opportunity to get to know all family members well and experience how they interact with each other and what their responsibilities or roles in the family business are. The interviews were carried out using an interview guideline (see Table 2) designed to gather all the information we required, including the changing roles and duties of the founder and the successor, the sources of resistance, and the family dynamics observed during the succession process. Moreover, to obtain a comprehensive picture, the view of the family's daughter-in-law is also captured during this study, even though she is not actively engaging in the business. Since the eldest daughter was the reference person on-site, she was contacted and interviewed more frequently.

Interviewee	Position	No. of Interviews
Eldest Daughter	Family member, Top Manager	4
Youngest Daughter	Family member, Top Manager	2
Mother	Family member, Founder, CEO	2
Father	Family member, Founder, Owner	1
Son-in-law	Family member, Management	2
Employee	Housekeeping, longtime employee	1
Son	Family member, Top Manager	1
Daughter-in-law	Family member, not in the business	0
Consultant	Certified accountant, advisor for succession	2

Table 1: Allocation of interviews (November 2017 – June 2018)

Topics	Question(s)	Related Literature	Category
general information	Could you please describe your family business? (its history, culture, goals, relationship within the community etc.)		structure
	Please specify your position within the family firm and your daily agenda during a regular working week?		structure
	Please describe the strategy and/or the long-term goals of the family firm?	Veider & Kallmuenzer, 2016	strategy
	Employee management in the hospitality industry can be difficult due to factors such as seasonality or missing industry attractiveness. How does your firm experience this change and deal with it?	Wells et al., 2015	employees
pre-succession phase	Your family firm is in the lucky position that more than one successor is willing to take the business over, what kind of challenges did you anticipate from that?	Getz & Nilsson, 2004	succession
	During the intra-family succession process, was it always clear who could take over the business?	De Massis et al., 2008	governance
	This firm was founded in 1979. During the past decade, was there any preparation done for taking over the business, was the succession even a topic in the past 5 years?	Sharma et al., 2003	governance
	Family succession is a main determinant for the career choices of family members in the next generation. How was your choice influenced/did you influence the choice?	Sharma et al., 2003	succession
succession phase	All family members of the next generation are interested in taking over the family business, was there ever a thought about hiring an external CEO?	Fitz-Koch & Nordqvist, 2017	organizational structure
	How was the management structure in the family business before the succession was completed? Who fulfilled what duty, and how is it going to be?	Sharma et al., 2003	governance
	Family businesses are placing a high priority on long-term continuity and sustainability rather than on short-term profits. What drives family succession in the hospitality industry? If you look back, is this something that mattered to you?	Miller & Le Breton-Miller, 2006	social ties
	How do you experience the balance between socio-emotional wealth and business factors in the decision-making process of your family firm?	Berrone et al., 2010	SEW
post-succession phase	Looking at the business over the past 5 years: Was the upcoming team in charge clearly defined and the persons informed who will be in charge in the future?	Steier & Miller, 2010	organizational structure
	Succession is the action and event that leads to the transition of leadership, ownership etc., from one family generation to another. How did you experience this change?	Sharma et al., 2003	succession, family culture
	Looking back: was it obvious who could take over, was there any focus, individual educational training or knowledge transfer process evident?	De Massis et al., 2008	succession
	An important goal for many family businesses often is to maintain the business for future generations, not growth per se. What are the plans to keep the family business going?	Fitz-Koch & Nordqvist, 2017	strategy

Table 2: Semi-structured interview guideline

Each interview lasted 50-75 minutes on average and was digitally recorded with the permission of the interviewees. Each interview was supplemented with field notes that captured the non-verbal communication (i.e., behavioral observations and impressions) observed during the interviews. Within a day after the interviews, the interviews were fully transcribed. Such an approach enabled us to familiarize ourselves with the information gathered while preparing for subsequent interviews (Kvale, 1996). The original interview data were recorded in German, while key quotes were translated to English with the support of a native language interpreter. Each participant received a copy of the interview transcript for review and confirmation of accuracy. Member checking authenticates the accuracy of the information provided by the participants during the interviews (Guba & Lincoln, 1994) and strengthens the trustworthiness of the findings (Shenton, 2004).

Besides, during the one-month on-site internship, hotel employees were shadowed to comprehend workplace climate, including daily routines, extant social ties, the nature of the communication process, and the managing structure of the hotel. Such an approach provided rich primary information that improved the validity and reliability of the study findings (Nordqvist & Zellweger, 2010).

Finally, we collected archival data referring to hotels' sales records, articles in newspapers and magazines, brochures issued by the Tourism Board, and web reviews. These sources were crucial in setting the stage for our research and collecting data on how the hotel has evolved. We also used these archival materials to confirm and draw on the knowledge gleaned from the interviews.

### ***3.3. Data Analysis***

We use NVivo software to process all the interview transcripts, field notes taken during the interviews and the internship, and secondary data collected via archival materials, including



online reviews and the hotels' internal reports. Following the guidelines of Miles and Huberman (1994), our analysis proceeded as follows.

First, we read and reviewed interview transcripts and archival materials to ensure consistency in understanding (Kvale, 1996). Motives, actions, and meanings of multiple stakeholder groups involved in the inter-family succession process were then captured through open coding of text by two authors. To avoid interviewer bias in analysis, one author coded in NVIVO, while the other one coded on the printed data sources manually at the same time. A third author then compared and critically reviewed the coding. When we disagreed, we thoroughly discussed the particular code in detail and, in some cases, gathered additional data to clarify the context. Such an approach allows us to reduce the number of primary codes, removing redundancies.

Then, we compared our primary codes with the existing literature by revisiting the data multiple times to facilitate this comparison. This replication process was essential to avoid drawing distorted conclusions, a common concern in case study research (Yin, 2013). For instance, to better understand how the family has shaped the succession process, we developed a chronological overview of the hotel's development (see Figure 2). As such, using various primary and archival data sources, we enable "data triangulation" (Decrop, 1999) in identifying emerging secondary codes, resulting in rich, more accurate themes that enhance the credibility of our insights (Eisenhardt & Graebner, 2007). NVIVO software aided us in this process by allowing us to run multiple queries until we identify distinct themes based on the interview transcripts and archival materials.

### ***3.4. Overview of the Family Firm***

The foundation of this state-of-the-art family-owned hotel in the Alps of Western Austria by a well-experienced couple in the hospitality industry dates back to 1979. At the time of data

collection, the hotel is experiencing its first inter-family succession targeting three potential second-generation family members. Significantly, all first and second-generation family members of this hotel were not born and raised in this region. The only local currently involved in the business as a family member is the son-in-law of the family.

All family members have diverse educational backgrounds where all second-generation members had completed their college, unlike their parents. The diversity in the educational background has influenced the second-generation family members to conduct the hotel's daily routines more professionally and is also linked to the priorities in their personal lives. This can also be observed in the way they execute interactions with customers as well.

Being a boutique hotel, the vast majority of this hotel's customers are mainly international tourists. This may be because this hotel's website is the only website in the region that is translated into five different languages. The hotel that was started 40 years ago as a small family business is one of the major players in the hotel industry in Austria.

We have experienced the present situation of the hotel as follows. The parents who tried to build a sustainable business venture for their children are now in their seventies. The eldest daughter feels like she has defrauded her life, as she works tirelessly for the business without any appreciation. The son, a former ski star who has made a stellar career abroad, has now returned home because the family seeks his help to carry out the business. Yet, he is still trying to stay away from the business as no one had told him that he is supposed to be a part of the succession. The youngest daughter, who is willing to take over the hotel's responsibility, wants to be a part of the succession, but due to a lack of communication and trust from the rest of the family does not see her abilities fully recognized. The consultant, who has been hired to help plan the new hotel and the succession, is engaging in the difficult task of balancing the professional ('hard' issues) and emotional ('soft' issues) interests of the family members involved in the business.

Figure 1 portrays the present situation of the hotel as a tree, illustrating the role of all key members involved: The caring and powerful mother (woman watering the flowers); the founding father (man on the knees planting seeds); the supportive consultant (woman holding the ladder, the fruit basket and turning on the water); the son leaving the business (man who is cutting himself off the tree); the bustling eldest daughter (woman on the ladder harvesting); and finally, the ignored youngest daughter (woman eating an apple).

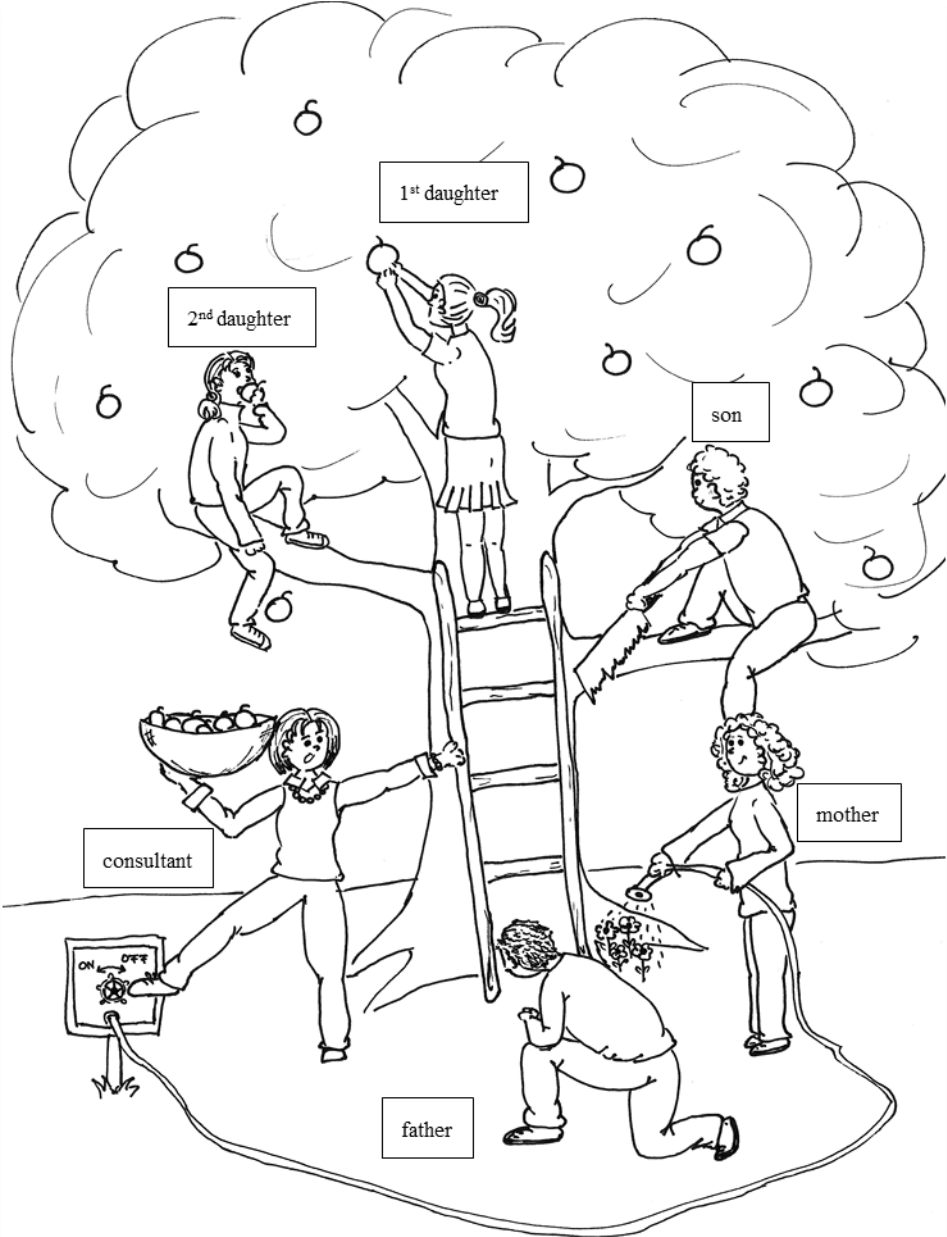
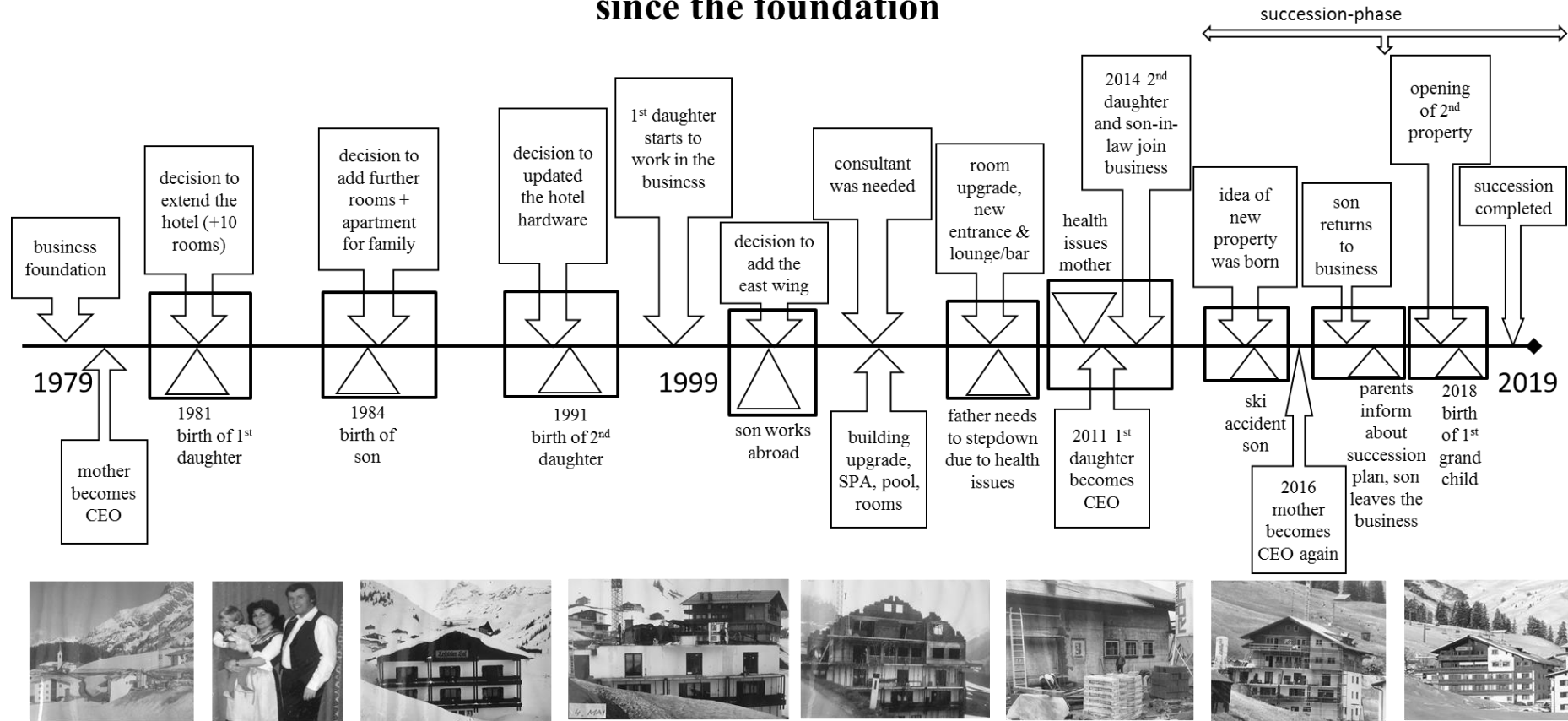


Figure 1: Pictographic illustration of the case

Figure 2 presents a comprehensive overview delineating the connections between family- and business-related decisions since its foundation. As Figure 2 portrays, some significant events in the family and the business often coincided in history (see rectangular elements highlighting ‘confrontation of family and business events’).

## Confrontation of family and business events since the foundation



*Source: Information and photos from the hotel archive*

3 Figure 2: Family and business events since the foundation

#### 4. Results and Discussion

Family business responsibility and succession planning issues emerged as two overarching themes in our attempt to delineate the motives and actions of multiple stakeholder groups involved in the selected hotel's inter-family succession concerning pre- and post-succession phases (see Figure 3).

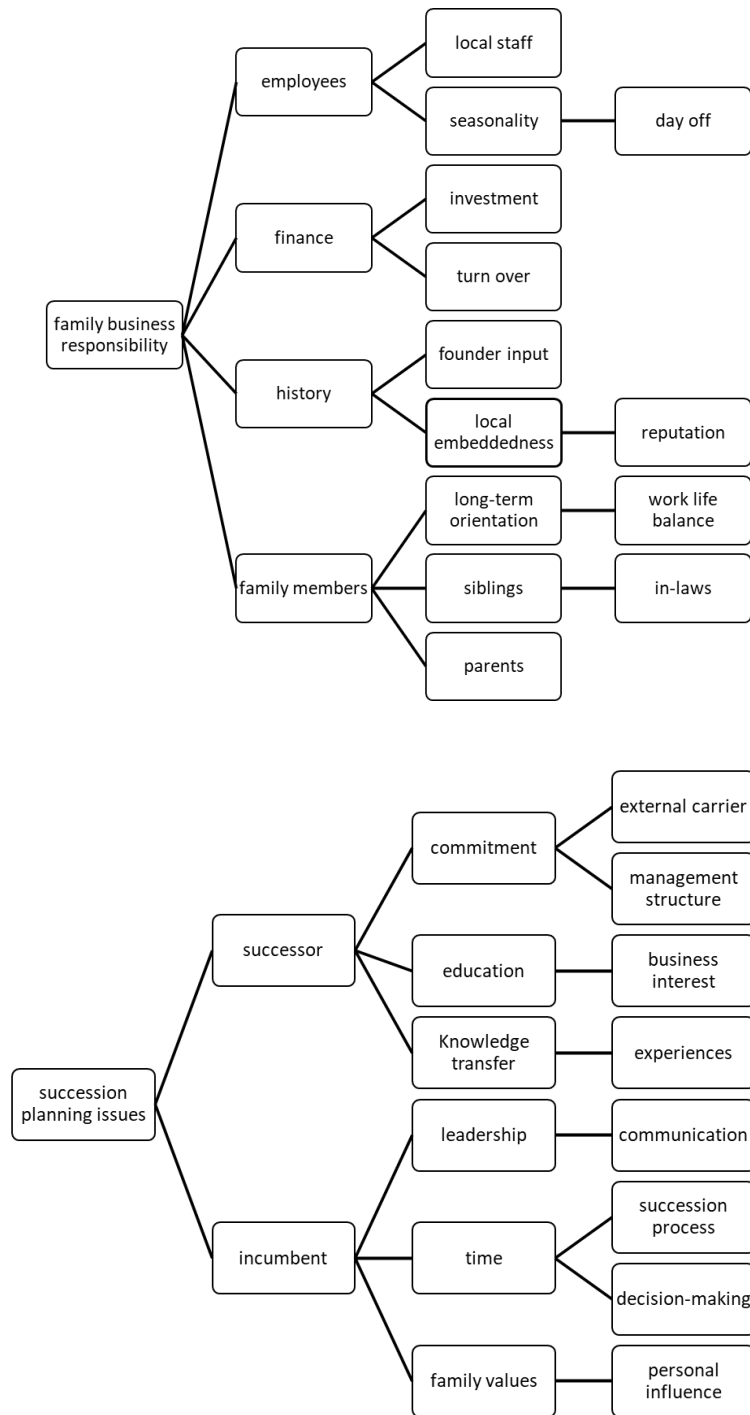


Figure 3: Key nodes extracted of the interviews, summed up to two main themes

#### ***4.1. Theme 1: Family Business Responsibility***

In line with prior literature on family business (Kammerlander et al., 2015; LeCounte, 2020), our findings indicate that owner/manager characteristics and emotional attachment among family members greatly influence managing family firms. As the youngest daughter of the family emphasized, they still seem to rely on the founder's decisions in managing the hotel, thus lacks innovations and business development opportunities: *"We don't know how to change the accounting system to a computer-based one as my mother does it in this way since the foundation."* After four decades of its inception, even today, the hotel's routine business processes required substantial input from the founders, often resulting in disputes and disagreements in decision-making. *"If I delegate something to a co-worker, it happens regularly that my father changes the tasks. After 20 years, I got used to it, but I wish we could clearly assign areas and responsibilities to each person"* (eldest daughter).

Even though all the family members agreed that they have strong ties and would like to work closely with each other, in some instances, it is observed that it is hard for them to treat each other with respect and accept and agree on decisions taken by them. *"We need to take a break from each other after the winter season, to start over with fresh spirit. I need this break from my family to be mentally able to do my job"* (mother). Concerning personal conflicts between family members, the consultant highlights the importance of overcoming sibling rivalry and streamlines the business processes focusing on the hotel's goals: *"The two inheriting sisters need to spend a two-week holiday together, focus on the business, learn to work together as a team, and start to respect the abilities of each other."*

Our findings revealed some significant events in the family, and the business development initiatives often overlapped in history (see Figure 2). During important family events such as the birth of three children, the founders felt that they need to extend the hotel to earn more for their living (see Figure 3): *"We rebuilt the hotel seven times since the opening."*

During difficult times or when founders' made terrible decisions, the founders always sought professional help to protect their social standing and image, *“As I realized that we did something wrong, I always looked for support to save our faces”* (mother). Tourism and hospitality literature emphasizes that family history and enterprise development are interrelated concepts that influence each other in family businesses, leading to family member satisfaction, the achievement of business goals, and social welfare (Getz & Carlsen, 2005).

Family firms are less likely to evaluate their investment on a short-term basis (Veider & Kallmuenzer, 2016). On-site observations and interview findings revealed that long-term orientation, focusing on both physical and intangible heritage (i.e., concerns for each individual's future), is highly neglected in the hotel. As Colli (2012) highlighted, the ‘history of emotions’ apparently affected the hotel’s long-term perspective concerning the founder’s willingness to transfer the hotel's ownership and management to the next generation while maintaining its legacy. In describing their lived experiences regarding succession planning, siblings of the family emphasized that lack of a well-defined succession plan and transition of the ownership structure inhibit the growth of the business and their personal lives.

The importance of including non-family members in decision-making was tied to business growth and evolution (LeCounte, 2020). Non-family members to be brought into a business as it grew over time, with them ending up in management roles and having leadership duties, and having decision-making ability (Wells et al., 2015). Our study also emphasized the vital role of non-family employees in family firms from an employer’s perspective. Since hotels are service-intensive businesses, the role of skilled and motivated employees is critical (Gürlek & Tuna, 2016; Wells et al., 2015) in providing high-quality service even during the succession process. As the mother states: *“A 4-star hotel is very service-intense and therefore an attentive staff is of crucial importance.”* To reap the maximum benefit from them, they should be assigned to clear tasks with a clear reporting structure under effective leadership. The hotel has



paid great attention to non-family employees by sending some of them to various management and leadership training programs to make sound business decisions without the founders' interference. However, the lack of a well-defined management structure and career progression opportunities has resulted in low-level trust between founders and non-family employees, leading to high employee turnover.

The family is often affected by the cyclical demand fluctuations due to the seasonality nature of the business. As the eldest daughter of the family emphasized *“We need to make all our money in four months, support the family and reinvest into the hotel. During summer, we just keep the hotel going and assure the bookings for the upcoming winter.”* Seasonality is also significantly influenced by changing behaviour of the hotel guests, as the hotel is required to adapt to such changes (Getz & Carlsen, 2005; Getz & Nilsson, 2004): *“In past times we could count on the different holiday seasons of the Dutch, Italians, Belgians, etc. This is now over, as these countries' traveling habits have changed”* (father). Although the hotel's location is relatively safe concerning the snowfall during the winter, the hotel's business is influenced by changing traveling habits: *“If the Easter holidays are very late, our good snow conditions until the end of April do not help our business much anymore, as the guests nowadays already want to experience summer feelings at Lake Garda during this time”* (mother). Innovation and adaption to climate change through entrepreneurship, as stated by Morrison (2006), could not be identified in this case, which is surprising as family firms do not just rely on their unique *‘familiness’* features but are also very specific and active in their entrepreneurship spirit (Jaskiewicz et al., 2015).

#### **4.2. Theme 2: Succession Planning Issues**

Our findings emphasized the pivotal role of the consultant as a mediator in reducing sibling rivalry and inter-family conflicts during the succession process. As the eldest daughter of the

family echoed, *“We are so glad that our consultant joined the process.”* The outside perspective and insights brought by the consultant tremendously helped the family members to accept the various opportunities offered by inter-family succession: *“I couldn’t realize the opportunities for all of us until our consultant did explain the advantages and disadvantages to me”* (mother). As such, the consultant was able to create trust among the family members, and the family felt that they had selected the right person to seek advice for the succession process: *“From the first moment on there was a good level of trust... she really opened my eyes”* (youngest daughter). *“She really gave us the confidence that she will guide us to a successful succession”* (son-in-law). Our findings are in line with prior literature emphasizing that an independent consultant’s advice on ownership changes (Sharma et al., 2003) could create such an entrepreneurial legacy in multi-generation families.

In contrast to Chu (2011), the case shows that small family firms are not always an indicator of effective communication and closer family ties. We could identify a lack of clear and open communication as one of the main gaps within the hotel, as no one, before the succession process, expressed what their position or expectations were. Communication prior to the event about ‘how’ and ‘who’ could have relieved the family members’ concerns (Filser et al., 2013; Leiß & Zehrer, 2018): *“It was never an issue until my brother returned, even when we started planning of the new hotel, succession was never a topic”* (eldest daughter). The case also illustrates the consequences of ineffective communication. One of the potential successors did not feel attached to the business as no one ever had informed him that he was intended to be part of the succession, which caused him to stay away from the business entirely, *“They never talked to me that I am a part of the succession, if they would have taken a moment to express their thoughts and will, it might all be different”* (son). All family members agreed on the importance of positive and open communication pre, during, and after the succession: *“The parents should talk to us about their future plans so that we could adjust to their solution”* (son-

in-law). A clear and transparent communication could have created a positive atmosphere positively influencing the succession process: *“I wish we could arrange a real meeting and a daily jour-fixe, regularly to improve our communication”* (youngest daughter).

All three siblings expressed that effective knowledge transfer is a critical predictor in successful inter-family succession. Concerning succession, the potential successors emphasized that acquiring internal and external experience plays a vital role in grooming: *“I wish there was some time during the day where they [the parents] took us aside to pass on some secrets of their way of how to do things”* (youngest daughter). *“I am the outsider between my siblings. They really work hard but miss to transfer their knowledge to the family so that the business improves overall”* (son). As suggested by the consultant, the founders could ensure smooth knowledge transition if they have set up a workplace climate with an open communication strategy: *“They all have tremendous knowledge of their business fields but just do not share it; they need to overcome this thinking and systematically pass things on”* (consultant). This finding is in line with Dana and Ramadani (2015), who echoed that the founders should commit to transfer knowledge to the next generation to ensure surveillance and longevity of family firms especially when multiple successors are involved.

During the on-site internship, it was noticed that several family members often stated their desire to adopt a well-defined management structure as lack of governance and clear ownership structure subsequently incite conflicts. An effective succession plan in conjunction with a clearly defined management structure could help sustain the hotel and realize organizational goals (Nwuke et al., 2020; Porfirio et al., 2020). The founders were advised to obtain external help in fine-tuning the management structure professionally, but, controversially, they refused it: *“We need to look into our governance and get professional assistance to fix it, but it is never the plan to hand it over to someone else”* (eldest daughter).

Disputes or disagreements, natural phenomena that frequently occurred in family firms, are neither desirable nor encouraging (Frank et al., 2011). Concerning succession, the consultant revealed that: *“I experienced that they [family members] will not effectively complete the succession if they do not start to forgive each other, to trust and accept all involved members during the succession.”* Acceptance and mutual trust are pivotal in an inter-family succession and can be fostered through initiating open communication and mutual adjustments (Mokhber et al., 2017). As the mother emphasized: *“I am not sure if they know how much work it will be to lead the hotel all by themselves... right now we are five of us taking care of it all... I am not sure if they are ready”* (mother). Fostering mutual trust and understanding among family members lessens sibling rivalry and conflicts and could positively influence the succession process (Leiß & Zehrer, 2018).

Concerning fostering mutual trust and understanding, the youngest sibling of the family echoed: *“I trust my older brother and sister 100%, I hope they do see my abilities and accept me... this would mean a lot to me.”* Interview findings with the parents revealed a similar level of anxiety and confidence concerning their children’s abilities in managing the business without their active involvement. As the eldest daughter of the family reveals: *“Since our parents experienced life-threatening diseases in the past years, they started to lose their retention and showed more trust in and acceptance of our capabilities.”*

In particular, parents also wish to distribute the property among the siblings equally: *“It is my goal to give everyone the same”* (father) and *“It is my wish not to discriminate one of my children”* (mother). The parents’ wish to equally distribute the inheritance across successors is a family firm-specific phenomenon. However, it can also lead to conflicts and rivalry among siblings when more potential successors, like in this case, are present (Jaskiewicz et al., 2015).

As the literature indicates, family firms often extend existing properties or even build new ones to ensure an equal inheritance for family members (Schlömer-Laufen & Rauch,

2020). In line with such findings, the consultant has also advised the founders to build up another hotel to ensure inter-family succession will not result in rivalry or conflicts among the siblings. As the consultant highlighted: *“This succession is complex, but the decision to build a second hotel might actually have been the first point in actively thinking about succession.”* One of the long-term employees interviewed also had the same impression: *“I believe the intention behind putting up a new hotel is to make sure all three children inherit equally, as they care so much for all their three kids.”*

The hotel was more than a business entity that is led and owned by family members; instead, it was where family members shared their personal lives and workspace. The ‘family member’ factor was found to play an important role in the succession process (Veider & Kallmuenzer, 2016) and long-term orientation of the business. During the interviews, mixed opinions about hiring an external CEO has emerged. Two out of three potential successors were open to this approach but believe that family firms should stay in family control and thus be managed by family members. This argument is probably also the reason for the succession process’s outcome: The firm's ownership and management responsibility ended up remaining in two of the three potential successors’ hands. The two daughters ended up inheriting the two hotels and joined the management. In contrast, the son agreed to receive a monthly payment from the family business for 15 years, beyond legal requirements due to the cohesiveness among the family members thus resigned from any ownership claims.

## **5. Conclusion**

In conclusion, our research paper highlights inter-family succession as a critical phase of change for a hospitality family firm that can intensify conflicts among the competing siblings. Deciding on who will succeed and how it is handled and expectations are managed in an inter-

family succession simultaneously showed several opportunities and risks, leading to three significant contributions.

First, we contribute to stewardship theory by applying it in the hospitality setting to identify emotions, motives, and actions involved in inter-family succession from a multi-stakeholder perspective, including the incumbent, successor, and non-family employees. Presently, the stewardship theory has rarely been used in tourism and hospitality literature, focusing on family businesses (López-Chávez et al., 2020). As Davis et al. (2010) emphasized, such an approach allows understanding the differences between family members and non-family employees regarding their perceptions of stewardship concerning inter-family succession.

Second, we merge tourism and hospitality and family business literature by providing a coherent and comprehensive understanding of the motives, actions, and meanings of multiple stakeholder groups involved in the inter-family succession of a hospitality firm concerning pre- and post-succession phases, which has been mostly ignored in tourism and hospitality and family business literature (Bozer et al., 2017; López-Chávez et al., 2020). Our findings indicate that a well-defined succession plan can increase the probability of success (Madison et al., 2016). In line with stewardship theory, we discovered that including the successor early in the planning process ensures that the successor will take ownership of the initiatives and create an atmosphere where the new management structure is compatible with the incumbent's, allowing for a smooth transition between the generations. Moreover, the successor's active involvement in the succession process would foster a strong stewardship commitment to the family business, enhancing his/her reputation and recognition as a potential leader among the family and non-family employees (Eddleston & Kellermanns, 2007; Madison et al., 2016).

Our third contribution to hospitality literature is improving our understanding of how a hospitality family firm can strategically manage rivalry and competition among potential successors during an inter-family succession. Our findings highlight that independent

consultants can help family firms strategically manage rivalry and competition among potential successors by bringing diverse expertise, skills, and experiences to the table that may not be available within the family business. Independent consultants offer conversant and proficient family business-related advice beyond the advice generally provided by incumbents and successors (Filser et al., 2013). As such, we highlight the importance of founders, potential successors, and consultants working together to promote greater cooperation and cohesiveness between family members to ensure smooth inter-family succession.

Finally, our paper adopts an in-depth longitudinal ethnographic case study approach, as it believes in the value of understanding motives, actions, and meanings of multiple stakeholder groups involved in an inter-family succession. This methodological novelty offers some vital insights into the complex ensemble of emotions and actions involved in the inter-family succession covering pre-, during, and post-succession phases in its naturalistic setting. This level of understanding is often missing in family business literature in general (Ferrari, 2021; Leiß & Zehrer, 2018) and tourism and hospitality context in particular (López-Chávez et al., 2020).

Our study also offers several practical implications. First, for hospitality family firm founders and owners looking forward to initiating inter-family succession, a good starting point would be to develop a succession plan in line with the firm's strategic plan. Without creating a succession plan delineating a clear ownership structure, a family firm could fail inter-family succession, threatening its survival and continuity. Second, many family firms fail in inter-family succession due to a lack of open and transparent communication results in overwhelming conflicts and rivalry among competing siblings (Frank et al., 2011; Leiß & Zehrer, 2018). Therefore, a successful succession plan should include activities aimed at fostering clear and open communication among family members, subsequently resulting in improving mutual understanding among each other.

The present study is not without limitations. Our findings cannot be generalized due to the qualitative approach adopted focusing on a single family-owned hotel in Austria (Yin, 2013). Although having a case study from a family-owned hotel in Austria facilitates the transferability of our findings to other parts of the European context to a certain extent, however, the results might diverge in differently structured family firms in tourism and hospitality industries in various cultures such as Asia (Teixeira et al., 2020). Thus, future studies focus on multiple types of family firms in hospitality industries in diverse cultures are warranted. Another potential limitation of our study includes social desirability bias (Guba & Lincoln, 1994). In some instances, respondents may feel reluctant to share accurate information, thinking that such information creates a negative image of their family members. Future research could use carefully phrased questions and a multiplicity of data collection techniques to avoid such issues.

Besides, our paper focuses on first-generation inter-family succession. However, second or third-generation succession implies more potential successors and various possible conflict sources (Leiß & Zehrer, 2018), offering an exciting opportunity for future research. Moreover, the findings might also be influenced by different external conditions (e.g., recession, war, or pandemic) affecting family dynamics during succession. While the scope of our study barred us from considering the influence of various external conditions in our analysis, we believe that future studies could yield new insights if such conditions were taken into account.



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