

Guest editorial: Family business in tourism and hospitality

Guest editorial

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Introduction

In the tourism and hospitality industry (THI), most enterprises are characterized by small size and family ownership (Getz and Carlsen, 2000, 2005; Cunningham and Seaman, 2022; Valeri, 2022; Valeri and Katsoni, 2021). Between the family and the firm, an exclusive entrepreneurial culture develops (Astrachan, 2003; Peters and Kallmuenzer, 2018), potentially making transgenerational entrepreneurship the main economic engine in the tourism industry (Puzi and Ismail, 2017). Influenced by the family conflicts, local culture and commercial interests, the management of this type of business involving family members has become increasingly more complex over the years (Ismail *et al.*, 2019). This highlights that the development of a family business (FB) is influenced by three factors: the family, property and the business system adopted (Gersick *et al.*, 1997; Peters and Buhalis, 2004). These characteristics of FB are connected to the family's life stage and its culture. Human, social and financial capital represent the natural resources owned by the FB (Ireland *et al.*, 2003). The exploitation of resources in the FB approach is different from that in the non-family business (NFB) approach (Sirmon and Hitt, 2003).

These exclusive resources reflect the fact that the family acts as owners. Therefore, the intangible familiarity factor is the element that diversifies the FB from other NFBs (Valeri, 2021; Alkhatib and Valeri, 2022) and can represent a competitive advantage; however, at the same time, by having a suffocating effect (Craig and Lindsay, 2002), family-related skills and resources could inhibit growth (Camisón *et al.*, 2016). Regarding market performance, FBs have advantages and disadvantages. The advantages are represented by personal relationships with corporate stakeholders (Mustakallio *et al.*, 2002; Baggio and Valeri, 2020; Valeri and Baggio, 2020, 2021a, b; Gajdošík and Valeri, 2022) and strong social values (Peters and Kallmuenzer, 2018), highlighting the positive relationship between family involvement and performance (Allouche *et al.*, 2008; Lindow *et al.*, 2010; Block *et al.*, 2011; Chu, 2009; Wagner *et al.*, 2015). The disadvantages are often related to the nature of relationships often characterized by the lack of professionalism of family members (Chaudhry and Crick, 2004; Crick *et al.*, 2018) and to the absence of a business strategy or a vision (Legohérel *et al.*, 2004; Pikkemaat and Zehrer, 2016). Therefore, business development and family history are two related concepts that influence each other. A FB is governed by the objective of pursuing the vision of a business, which is owned by a dominant group and is under the control of family members, such that the business is sustainable across generations of the family (Chua *et al.*, 1999). In a FB, the important elements are the following: the same family members' exercise of control of the FB, the pre-eminence of family benefits and the production of sustainable income for future generations (Jaskiewicz *et al.*, 2015).

Furthermore, for the survival of the FB in tourism, innovation in response to a constantly changing environment is required, and shared products are offered by many actors (Sundbo *et al.*, 2007; Kallmuenzer and Peters, 2018a). Letonja and Duh (2016) believe that "the survival of family businesses across generations depends upon different factors, including their ability to renew through innovation" (Letonja and Duh, 2016). However, in the tourism industry, the owner often runs the business himself, or the business is run by a few close family members (Getz and Carlsen, 2000; Kallmuenzer and Peters, 2018b). Therefore, ownership and



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management are often coincident. Therefore, family involvement is very strong, and consequently, a strong innovative element is expected to emerge within FBs (Obermayer *et al.*, 2021). In addition, by implementing innovative strategies, tourism companies create a more sustainable environment, as they recognize innovation as an essential and promoting engine for sustainable development in tourism (Arcese *et al.*, 2020; Elmo *et al.*, 2020; Kumar *et al.*, 2022; Deb *et al.*, 2022a).

In tourism and hospitality, compared to general management, innovation is a more complex dimension. Innovations consist of product, service, management, marketing, process or institutional innovations (Legohérel *et al.*, 2004; Hall and Williams, 2008; Hjalager, 2010; Kallmuenzer and Peters, 2018a). Innovation in tourism and hospitality is more limited in FBs than in NFBs. The factors that determine whether a FB will innovate are either economic factors, such as financial restrictions, or non-economic factors, such as risk aversion, the maintenance of traditional products, family conflict and closure to external information by investors (Hauck and Prügl, 2015; Camilleri and Valeri, 2021; Deb *et al.*, 2022b; Shekhar *et al.*, 2021). In the same way, FBs may give up on implementing sustainability practices, as their implementation often requires innovation and high risk (Memili *et al.*, 2017; Elmo *et al.*, 2020). Some studies in the literature show that innovation is a factor in ensuring long-term survival (Craig and Moores, 2006; Bergfeld and Weber, 2011; Hauck and Prügl, 2015).

The heterogeneity of FBs can be explained by socio-emotional and non-economic factors (Chrisman *et al.*, 2012; Hauck and Prügl, 2015). Moreover, some researches show the decreasing propensity for innovation of FBs (Litz and Kleysen, 2001; Craig and Moores, 2006; Beck *et al.*, 2011). Other researches show that the once structures and processes are acquired and consolidated, FBs reduce their ability to react to external changes (Westhead *et al.*, 2002). Generally, these companies are more hostile toward innovative processes precisely because they tend to want to maintain the status quo of the acquired elements (Vrontis *et al.*, 2016). Other interesting aspects of FBs concern their relation to the innovation and succession process. It is possible to argue that the involvement of the successor in a business can act as a “catalyst of change”, that is, as an opportunity to innovate (Kotlar and De Massis, 2013).

Presentation of the special issue

The special issue aims to provide a comprehensive collection of papers including new insights for traditional paradigms, approaches and methods, as well as more recent developments in research methodology in FB in tourism and hospitality. The aim of the special issue is to verify whether, in the THI, the *FB model* is an important development opportunity for this industry. In this context, the authors will investigate personal and family needs and preferences alongside the relationship between FB model, growth and profit maximization and the development of tourism businesses.

The special issue contains 10 full papers written by 36 authors located in 17 different countries and affiliated with 25 different universities.

The first paper titled “*Mapping research on family business in tourism and hospitality: a bibliometric analysis*” is written by Shekhar and Anjali Gupta from University of Delhi (India) and Marco Valeri from Niccolò Cusano University (Italy). The paper aims to map the development of research on FB in tourism and hospitality and provides insights into the key contributors, key areas and current dynamics and suggests future research directions in the field. This study uses the Web of Science (WoS) database to identify the 124 articles published in the theme. The study uses bibliometric indicators such as the co-citation network, word co-occurrence network to analyze the publication and citation structure using Science of Science (Sci2), OpenRefine and Gephi. The top authors, top journals and major themes are recognized using bibliometric techniques. The study identifies six keyword clusters: entrepreneurship, innovation and empirical collaborating with tourism, hospitality and FB.

The country-wise collaboration indicates the lack of research in the eastern hemisphere of the world. The co-authorship shows studies shared among individuals of a few organizations. The trends from bibliographic coupling depict the evolution of research. The scope of data collection for the network analysis is limited to the WoS. Incorporating papers from other databases might provide different network structures and insights. This study is the first of its kind in the theme of FBs in tourism and hospitality and will contribute to the literature by identifying future research directions.

In the second paper titled *"Family Firm Succession in Tourism and Hospitality: An Ethnographic Case Study Approach"* Andreas Kallmuenzer from La Rochelle Business School (France), Kayhan Tajeddini from Sheffield Hallam University (United Kingdom of Great Britain), Thilini Chathurika Gamage from Sabaragamuwa University of Sri Lanka (Sri Lanka), Lorenzo Daniel and Alvaro Rojas from Universidad de Cádiz (Spain), Michael Josef Alfred Schallner from University of Innsbruck (Austria) explores the motives, actions and meanings of multiple stakeholders involved in an inter-family hospitality family firm succession. A longitudinal, ethnographic case study approach collects data from 15 in-depth interviews, one year of observation and a one-month on-site internship. 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 FB. Moreover, a clear and open communication strategy is required to strategically manage rivalry and competition among potential successors during an inter-family succession. The succession process of family firms remains an intensely discussed phenomenon, and despite its importance to the THI, the intersection between tourism and hospitality and FB 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.

The third paper titled *"Promoting small family businesses through OCOP program and tourism activities in rural areas in Vietnam: the case of Bac Giang province"* is written by Anh Thi Phuong Le and Neethiahnanthan Ari Ravagan from Taylor's University (Malaysia), Puvaneswaran Kunasekaran from University Putra (Malaysia), Hung Ngoc Le and Tuan Thanh Nguyen from VIPTAM Institute of Technology Application (Vietnam) and Thang Vu Luong from Bac Giang Department of Science and Technology (Vietnam). The paper aims to employ the rural economic development program in Vietnam associated with tourism to support small FBs in rural areas cost-effectively. This study used the geographic location mapping method to design tourist routes that connect tourism resources with OCOP producers. A stakeholder approach was employed to identify suggested practical works that need to be implemented while developing this tourism initiative. Four rural districts of Bac Giang Province, a northern province in Vietnam known as the place of various indigenous people live and traditional craft villages. Many cultural and historical tourist sites have been chosen as sample areas for this study. By using Google map, based on the Bac Giang Tourist Map and a list of recognized OCOP products in Bac Giang Province, main tourist sites (16 locations) and small FBs (known as cooperatives and households) that have OCOP products (17 places) in the four districts have been identified. Four notable tourist routes have been formed to propose four thematic tours (two one-day tours and two 2days-1night homestay tours). Suggestions for related stakeholders to ensure the sustainability of this initiative are provided. This study is supposed to be a model of promoting small FBs through OCOP programs and tourism activities in a sustainable way in Vietnam. The outcome of this study is in line with the stakeholder theory emphasizing the systematic connection of various stakeholders such as employees, suppliers, local communities, government agencies and others toward complex business sustainability.

In the fourth paper titled *"We're in survival mode: How family-owned small foodservice firms in India responded to the Covid-19 pandemic"* Senthilkumaran Piramanayagam from

Welcomgroup Graduate School of Hotel Administration (India), Saurabh Kumar Dixit from North-Eastern Hill University (India) and Partho Pratim Seal from Manipal Academy of Higher Education (India) examine the crisis faced, strategies adopted, barriers for recovery and the future outlook by the operators of family-owned small food service business firms in responses to COVID -19. The COVID-19 pandemic has unfolded unprecedented challenges, severely disrupted the family-run small foodservice business units, and often put them on the brink of closure of business. The methodology adopted is a qualitative research approach. The data for the research is collected through a semi-structured interview. The data was collected from the 13 family-owned food service providers. The data are collected through a semi-structured telephone interview as there is a restriction of travel between different regions. The finding reveals that small family-operated foodservice firms faced multiple challenges, including threat for existence, the pressure of fixed cost, feeling unethical, financial instability, uncertainty on future and feeling of loss of goodwill with lenders. This paper is the first to discuss the impact of COVID-19 on small family-owned food services businesses in an Indian context.

In the fifth paper titled “*Online branding strategies of family SME wineries: a Hungarian-German comparative study*” Ivan Paunovic from Hochschule Bonn-Rhein-Sieg - Campus Rheinbach (Germany), Nóra Obermayer and Edit Kovari from University of Pannonia (Hungary) explore and compare online branding strategies of family small and medium sized enterprises (SME) wineries at Lake Balaton (Hungary) and Lake Constance (Germany), as two wine regions with similar geographic characteristics. This paper, based on a total sample of 37 family wineries, 15 at the Lake Balaton and 22 at the Lake Constance, investigates the differences in brand identity on the website, brand image in social media and online communication channels deployed in both wine regions. The study applies a qualitative methodology using MaxQDA software for conducting content analysis of texts in websites and social media. Descriptive statistics and *t*-test were conducted to compare the usage of different communication channels and determine statistical significance. At Lake Balaton, the vineyard, the winery and the family, while at Lake Constance, the lake itself and the grape are highlighted regarding family winery brand identity. The customer-based brand image of Hungarian family wineries emphasizes wine, food and service, with the predominant use of Facebook. In the German family wineries, the focus of brand identity is on wine, friendliness and taste, and include more extensive usage of websites. The paper deploys a novel methodology, both in terms of tools used as well as geographic focus to uncover online branding patterns of family wineries, thereby providing implications for wine and tourism industries at lake regions. It compares the share of selected most-used words in the overall text in websites and in social media and presents the key findings from this innovative approach.

The sixth paper titled “*Family Businesses in Tourism Industry: A Research Agenda*” is written by Ozan Hüseyin Altın and Ige Pınar from Yasar University (Turkey) and Engin Deniz Eris and Ebru Gunlu from Dokuz Eylül University (Turkey). The aim of the paper is to construct a comprehensive review on FBs in the tourism industry since glocalization and small businesses comprise most of the industry. This is a conceptual paper which utilizes qualitative research methods. Bibliometric analysis is applied to the selected 35 articles from specific databases which include not only the general tourism industry but also subsectors of airline, hospitality, restaurant, etc. Articles in this study fixate on the FBs within the tourism industry. In total, 35 articles are found with the keywords “family business and tourism”, “family business and hospitality and hotels”, “family business and restaurant” and “family business and airline”. Though the FB studies focus on hospitality, tourism and restaurants as F&B, there is a research gap in the subsectors like rent-a-car companies, travel agencies and tour operators and recreation facilities. Overall qualitative research design is preferred, but majority of the authors’ focus is on business development, profit, performance and

succession. For further studies, quantitative analysis on research gap areas are recommended. The most general limitation is that only specific selected databases are used for the data gathering process such as double reviewed indexed journals published within Web of Science, Emerald, Elton B. Stephens Company (EBSCO) and Elsevier databases from the period of 1970s. Some other databases and some different periods may be considered as well as different keywords for other research. Secondly, few studies have analyzed quantitative data since the specific nature of the FB dynamics require qualitative data. As a suggestion, not only qualitative analysis but also mixed methods may also be studied since the literature lacks the studies conducted with these methodologies. This study contributes to the existing literature by providing a comprehensive review on hospitality and tourism FB management emphasizing the research gap on subsector application areas.

The seventh paper titled “*Exploring the life cycle of family-owned tourism businesses in maturity*” is written by Beatriz Adriana López-Chávez and César Maldonado-Alcudia from Universidad Autónoma de Occidente (Mexico). This paper analyzes the life cycle of family-owned hotels in the maturity phase from the integration of theoretical models for family-owned tourism businesses. A qualitative multiple case study was used to analyze four mature family-owned hotels through eight interviews and four observation guides with an abductive method. Three axes were analyzed; the ownership with the Gersick model, the family with the Tobak and Nábradí model, and the business with the Butler tourist areas model to identify whether they are going through the consolidation stage, stagnation, rejuvenation, or decline within its maturity. The cases studied evolve in the three axes. In the business axis, two go through the stagnation stage, another in decline and the last in consolidation; all remain under controlling owners. In the family, there are different generations in charge. The boost to the destination plays a key role as a force for deterministic change in the internal transformation of these organizations, and to remain in consolidation, discontinuous changes and voluntaristic actions are necessary. Family businesses seek longevity, although a low percentage reaches maturity. This research proposes the integration of life cycle models to understand its development in the axes of family, ownership, and business, where aspects of the tourism industry are considered and allow the stage identification through which it passes in maturity, supporting internal decision making.

The eighth paper titled “*Coping Mechanisms of Philippine Tourism and Hospitality Family Businesses during the COVID-19 Pandemic: A Non-Parametric Approach*” is written by Andrea Santiago from University of St. La Salle (Philippines) and Fernando Martin Roxas, John Paolo Rivera and Eylla Laire Gutierrez from Asian Institute of Management (Philippines). The paper aims to determine if there were differences on how family and non-family enterprises in the THI coped with government restrictions. Family businesses, mostly small-sized, dominate the THI, especially in the rural areas. While many would have been used to the impact of demand seasonality, it is unknown how these businesses would have survived through the restrictions imposed to contain the coronavirus disease 2019 (COVID-19) pandemic as compared to NFB counterparts. By subjecting the survey data from tourism enterprises to non-parametric techniques, the authors establish empirical evidence on similarities and differences of coping strategies adopted by FBs and NFBs. Their required support from government and their perceptions of a post-pandemic THI. The analysis revealed that family-owned tourism and hospitality businesses in the Philippines tended to collaborate with other businesses to manage the impact of the pandemic restrictions. Since they hired more seasonal workers prior to the restrictions, they tended to avoid hiring workers during the restricted period. NFBs, on the other hand, that were generally larger in size and more professionally managed with more regular employees, tended to streamline operations for greater efficiency. The study relied on survey results distributed and collected online. There is an innate bias against those firms that did not have access to the survey links. The comparative study suggests that interventions to assist firms in the THI should consider the differences in firm ownership as “one size does not fit

all.” The study provides evidence about how environmental factors impact the operations of family firms. Thus, it provides valuable insights for both the academic community and industry practitioners. This is the first study in the Philippines that was able to capture response of family and non-family firms in the THI during the COVID-19 lockdown.

The ninth paper titled “*Assessment of the quality of the service perceived in specific contexts of management of a family business*” is written by Carla Martins Igreja, Bruno Barbosa Sousa, Tiago Silva from Polytechnic Institute of Cavado and Ave Higher School of Hospitality and Tourism (Portugal) and Cláudia Miranda Veloso from University of Aveiro Higher School of Technology and Management of Águeda (Portugal). The aim is to apply the SERVQUAL model to evaluate the quality perceived by customers in the context of family hotel management in Portugal. More specifically, to assess the influence of interpersonal relationships (service providers and customers) in FB services in the wine tourism segment (i.e. wine hotel and spa). In this way, it aims to provide data that can support this family hotel to reinforce the quality of the services provided to guests and therefore their satisfaction and loyalty. Statistical techniques, using Microsoft Excel 2016® and SPSS Statistics 25.0®, were multivariate for the analysis and validation of the results. In this analysis it can be seen that except the empathy dimension, in which the evaluation of perceived quality is positive, i.e. customer perceptions were higher than expectations, the remaining dimensions of the SERVQUAL model were negative. The safety dimension ranked second, followed by service delivery dimensions, problem solving and tangibility. The results show that the empathy dimension positively influences the evaluation of the perceived quality and thus also the satisfaction and loyalty of guests to the family hotel in the wine tourism segment. So, it is recommended that the hotel management of this family hotel reinforces service quality by investing in the improvement of physical facilities, problem-solving capacity, and service delivery, to obtain higher levels of perceived quality service and hence customer satisfaction and loyalty and, simultaneously, increase its performance and organizational sustainability.

In the tenth paper titled “*Thriving family businesses in tourism and hospitality: A systematic review and a synthesis of the relevant literature*” Mark Anthony Camilleri from University of Malta (Malta) and Marco Valeri from Niccolò Cusano University (Italy) discusses on the opportunities and challenges for developing FBs in tourism and hospitality. A systematic literature review was carried out through peer-reviewed publications that were indexed in Scopus and Web of Science. It relied on the PRISMA protocol to evaluate rigorous articles and reviews. A content analysis sheds light on high impact contributions on “family business” and “tourism” or “hospitality”, which were published since 2010. This bibliographic research captured, analyzed and synthesized the findings from previous contributions to identify the factors that are facilitating the growth prospects, long-term sustainability and innovative approaches of FBs within the THI. Currently, there are just a few contributions that advance relevant knowledge and understanding on the business development of family firms in tourism and hospitality. This research addresses this academic gap as these entities constitute the life blood of tourist destinations in various contexts.

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Further reading

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