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MANAGEMENT OF CHANGE IN TOURISM – THE PROBLEM OF FAMILY INTERNAL SUCCESSION IN FAMILY-RUN TOURISM SMEs

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Abstract

"World-wide, the family business constitutes the most prevalent form of business organization" (Poutziouris et al. 2004, p. 7). Alpine tourism is also dominated by small- and medium-sized enterprises (SME), among which family firms represent the majority (Astrachan and Shanker 2003). Family firms are urged to perform business, strategic, and succession planning for their survival (Knight 1993). Planning for the integration of the younger generation into the family firm is an issue of strategic importance. The purpose of this article is to report the results of a qualitative study among owners of family businesses, interest groups and consultants in order to explore ways in which family internal succession in family businesses can be accomplished successfully.

Key words: SMEs, family businesses, succession, success factors.

INTRODUCTION

Small and medium-sized companies

SMEs contribute significantly to a country's gross domestic product, national employment, and export performance (Culkin and Smith 2000). According to the European Competitiveness Report of 2003, 99% of European tourism firms employ fewer than 250 employees and 94% employ fewer than six employees (EC 2003). As Pechlaner et al. (2004, p. 9) observe, "in most parts of the world, but notably in many regions of Europe, tourism has developed into … a 'fragmented industry'". The same authors note that the tourism industry is characterised by below-average company size, low growth rates, weak internationalisation, relatively low market entry barriers, and relatively poor qualification levels - all of which have significant implications for the management and competitiveness of the SMEs that dominate the tourism industry. The significant competitive disadvantages faced by SMEs in tourism include: (i) little scope for economies of scale; (ii) limited potential for diversification; (iii) lack of access to capital markets; (iv) inadequate information about the market; and (v) high debt-to-capital ratios as a result of past mis-investments in facilities that now have low utilisation rates and poor operating returns. For these reasons, many tourism SMEs face an insecure future. Research into the failure of SMEs has revealed that the following factors increase the likelihood of business collapse:

- emotional attachment to the business, which makes owners and managers reluctant to abandon the enterprise in difficult times (Brown 1987);
- no formal business or marketing background and no prior experience in the tourism industry (McKercher and Robbins 1998);
- focus on lifestyle and a desire not to grow (Getz and Carlsen 2000);
- little capital and inadequate management (especially with regard to resistance to change or taking advice) (Shaw and Williams 1990);
- inability to cope with seasonal and weekend peaks (Lundtorp et al. 1999); and
- unsuccessful business succession (Poutziouris et al. 2004; Burns 2001; Poutziouris and Chittenden, 1996; Handler 1994).

Tourism offers relatively easy entry for SMEs. Many establishments of various types can be set up with low capital requirements and operated at low cost by a few people. In many cases, the motivation for involvement in these businesses relates as much to lifestyle, location, and leisure preferences as it does to a desire for profit or security (Getz and Carlsen 2005; Ateljevic and Doorne 2000; Getz and Carlsen 2000). Moreover, as Wanhill (2000) notes, the authenticity of a tourism experience for consumers can be enhanced by contact with local residents, which explains the appeal to many cultural tourists of bed & breakfast establishments, farm-stays, and the like. This might refer to the local roots and long-term and personalized management and ownership structure in SME family firms. It is therefore not surprising that, in many countries, tourism is dominated by SME family-owned businesses (Getz and Carlsen 2000; Morrison et al. 1999; Thomas et al. 1999; Smallbone et al. 1999; Buhalis and Cooper 1998). Despite the fact that worldwide the majority of SME firms are family firms, the "family component" has often been neglected in organizational research (Dyer 2003). Recently, several scholars concluded that omitting the family as a variable in organizational research and management of change can lead to incomplete and misleading findings (Dyer 2003; Gómez-Mejia et al. 2001; Schulze et al. 2001). The main reason is that interpersonal connections differentiate family from non-family businesses (Milton 2008).

Against this background, it is apparent that - apart from other features about family firms like family control and involvement - the traditional SME structure of tourism family businesses in many countries (especially in Europe) has become a real disadvantage. It is the contention of the present study that the management orientation and particularly strategic decision-making of SME family businesses needs to change if they are to remain competitive in the future. The paper at hand, however, only focuses on one challenge within the management of change in family businesses, and that is family internal succession and answers the following main research questions:

a) What characteristics and qualifications should internal successors have?
b) What is the ideal time for family internal succession?
c) Why do family internal successions fail?

After a theoretical discussion on characteristics of family businesses and on the challenges of family internal succession, a qualitative empirical study is presented to understand how selected stakeholder groups in the Tirol see the problem of family internal succession in tourism family businesses.

FAMILY BUSINESSES

Family businesses are the predominant form of enterprise around the world (Gersick and Davis 1997). "In Europe, 70% of businesses are family owned or controlled" (Getz et al. 2004, p. 1). Family businesses form the majority of tourism and hospitality businesses, as tourism "offers many opportunities for family businesses, often embodying direct host-guest interaction in the family home or property" (Getz and Carlsen 2005, p. 237). Family business has no commonly accepted meaning and many authors have noted there is no consensus definition of a family business (Upton and Heck 1997; Wortman 1994).

Several authors have called for definitions that use multiple conditions to identify family businesses (Handler 1994). Among the definitions for family business that involve multiple conditions, many use requirements such as family ownership and control, family influence on decision-making, and intent to transfer the firm to the next generation (Sharma et al. 1997). According to Holland and Oliver (1992, p. 262) "a business firm may be considered a family business to the extent that its ownership and management are concentrated within a family unit, and to the extent its members strive to achieve, maintain and/or increase intra-organizational based relatedness." Lea's definition of a family business reads as follows: "A business is a family business when it is an enterprise growing out of the family's needs, built on the family's abilities, worked by its hand and minds, and guided by its moral and spiritual values" (Lea 1998, p. 1). Defined simply, family businesses are "owner-operated/managed ventures with family members (and/or family units) predominantly involved in the administration (managerial and financial), operations and strategic determination of corporate destiny" (Poutziouris et al. 2004, p. 8).

Family businesses merit special attention because they are especially complex, as potential conflict might arise between the family system and the business system (see figure 1), providing different roles among the company – family members, non-family investors, non-family employees, family shareholders, non-family working owners, working family members, working family owners and family owners and business leaders.

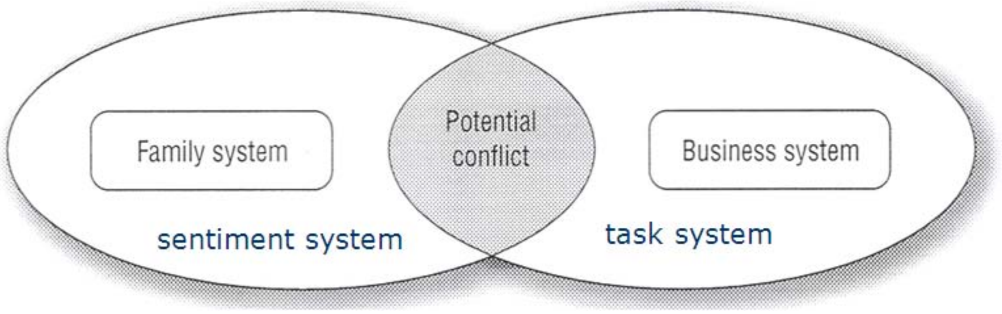

Figure 1. The two broad systems of family business (source: adapted from Burns 2001, p. 359).

The simplest model of family business structure is two-dimensional. Family businesses are a coupling of two relationships: (a) the social function, which is based on the emotional relationship of the family unit and where decision-making is often not based on a rational process; and (b) the business or task function where results are based on relationship and where the decision-making process must be based on an objective, economic model. Most of the difficulties and conflicts in a family business are the result of mismanaging the social and business relationship. While the family is taking care of family members and focuses on employment and advancement in the firm, the business system is more involved in production and distribution of goods and/or services, is aware of the need for professional management and aims at operating the firm in an effective and efficient way. However, this perspective is potentially endangered by what has been labelled 'subsystem stereotyping' (Whiteside and Brown 1991). Hence, it can be stated that the family system and business system differ in terms of various dynamics (see table 1). Therefore, it seems essential that clear organizational goals and objectives are established among the family business, a code of conduct is developed, clear policies regarding career development, compensation, promotion and performance appraisal must be established and an organization chart should be designed and communicated to all family members (Taylor 2006).

Table 1. Complexity of family businesses (Source: Taylor 2006, p. 4).

Dynamics	Family System	Business System
Basic motive	- to seek harmony	- to seek profit
Operating principles	- incorporate compassion and caring	- incorporate efficiency and objectivity
Rewards	- given because of one's membership in the family - sometimes because of need	- given because of performance on specific tasks
Promotions	- based on longevity - it is an inflexible system - promotion is born into a position	- based on skill and seniority - hard work can result in a new position
Training	- implicit - not standardized	- explicit - necessary to get a good job - standardized
Separations	- usually messy - no clear guidelines for process	- less painful - clear guidelines to follow - is a common process

While it has generally been accepted that family-controlled businesses differ from professionally managed firms, little empirical research has been done to support and advance our understanding of this premise in former days (Daily and Dollinger 1991). More recently, several studies have been undertaken that emphasize family businesses as an integral aspect of economic activity and organizational life (Aldrich and Cliff 2003; Steier 2003). Hence, there are several advantages and disadvantages that family firms encounter.

As far as advantages are concerned, family firms are often praised for their ability to nurture a sense of loyalty, a stable culture, long-term strategic vision and commitment, and pride in family tradition. Family can foster high ethical standards, positive commercial values, and a sense of responsibility, which can contribute to the transfer of entrepreneurial skills from one generation to the next. Family companies do have higher levels of concern for their community and non-family employees. Other advantages include concern and respect for individuals, and operational flexibility, particularly in terms of ad hoc business solutions, human resource management, and reward systems. Moreover, family members take a long-term view of their investments. Another positive issue is that decision-making is faster in family firms than in non-family companies (Burns 2001; Habbershon and Williams 1999; Nahapiet and Ghoshal 1998).

On the negative side, family firms can suffer from a number of disadvantages, including introversion, adoption of conservative philosophies in terms of sourcing financial and human capital, lack of professionalism, nepotism rather than meritocracy in promotion practices, rigidity, informal channels of communication, family feuding, and the absence of strategically planned succession (from the perspective of management, ownership and leadership) (Poutziouris et al. 2004). Often, private matters spill over into enterprise, which lead to discord, conflict, friction and disputes. One of the main issues family companies need to cope with is conflict between family and business, especially when there are differences between the family and business culture (Steier 2001). Finally, family businesses often have a tunnel vision, i.e. family firms can stumble when they focus on the past instead of the present or the future (Allio 2004). The most challenging disadvantage of family firms, however, is the problem of succession, which is seldom systematic and trouble-free.

THE PROBLEM OF FAMILY INTERNAL SUCCESSION IN FAMILY BUSINESSES

One of the most central problems facing family businesses is the ability to ensure competent family leadership across generations when it comes to business succession (Le Breton-Miller et al. 2004). “Succession is the ultimate test of a family business” (Berkel 2007, p. 21). Basically, two forms of succession can be identified – family internal and family external succession with united or separated ownership and management (see table 2).

Table 2: Succession options of family businesses (Source: Kirst and Bieler 1996, p. 65).

	Ownership and management are united	**Ownership and management are separated**	**Ownership and management are given up**
Family internal succession	Family member	Going public Employee participation Family donation	Liquidation
Family external succession	Management buyout Management buy in	External management Company sale, but management by former proprietor	Sale to third person

This article focuses on family internal succession. Many authors have suggested strategies for the younger generation's entry into the family firm. Most authors agree that children should work elsewhere early in their careers with most successors joining the family firm upon completing their education. Basically, intra-family succession is a problem in family business due to emotional issues, difficulties in business, failure to plan and other tensions and conflicts which might be raised. Hence, family internal succession often is problematic and can lead to conflict. Poutziouris and Chittenden (1996, p. 35f) observe that “four out of five family businesses are managed by the first generation, which benefits from the entrepreneurial drive of the founder. However, less than one third of founders successfully pass ownership and management control of the family business to the second generation. Only 10 per cent of the second generation family firms are transferred to third generation and less than 5 per cent ever reach beyond the third generation of family management.” Although many father-son or father-daughter relationships can work extremely well, there is a unique potential for conflict especially when it comes to discussing internal succession. The reason lies in the very close emotional link, which needs to be addressed between the two parties, among whom all issues surrounding the succession need to be addressed and agreed upon by the next generation. From the discussion on the characteristics and challenges of family internal succession, assumption 1 can be derived:

Family conflicts might be problematic and hinder family internal succession.

The usual approach to managing succession often is to ignore the issue. “It is almost as if owner-managers, particularly founders, are in denial about ever leaving the firm. It is a blind spot that they do not wish to discuss” (Burns 2001, p. 368). However, if succession is not planned and managed, it can become a stressful event. To aid the understanding of family business dynamics during the process of succession, the life-cycle framework might be helpful (see figure 2). “Essentially, it is a four-stage model that repeats, with increasing complexity as new generations join the firm” (Burns 2001, p. 362). There are strategic reasons for determining the timing of both entry in the firm and succession to power. While in stage 1, beyond start-up, the founder is in control, son or daughter is slowly introduced into the business. In stage 2, it would be vital to take the decision if the company is passed on to the son or daughter. In this case, a process of training and development should take place to groom the successor for his role. Stage 3 then is the stage when the successor shows sufficient expertise and the founder starts to loosen the reins of control and starts to delegate authority and share responsibility. At stage 4, strategic planning, management control and operational responsibility shifts from one generation to another. Therefore, “the most successful sucessions are those that involve the next generation early in the process so as to allow them to grow into the role rather than coming as an unexpected ‘event’” (Burns 2001, p. 369).

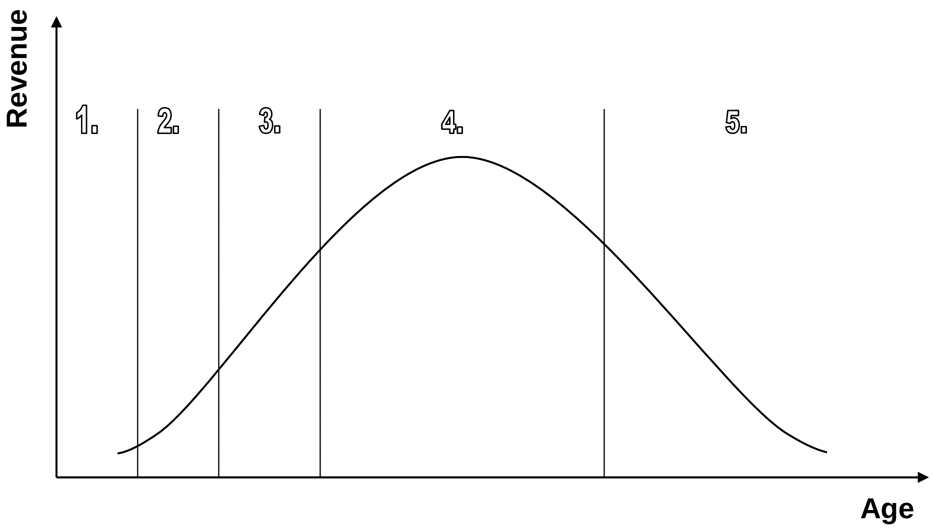

Figure 2. Succession as part of the company’s life cycle (Source: Lundtorp and Wanhill 2001, p. 948).

From the discussion on the right time and planning of succession, assumption 2 can be derived:

The time span of succession planning is essential for family internal succession success.

Hence, there is some consensus among literature that succession shall be anticipated and planned in advance (Dyck et al., 2002; Sharma et al., 2001). It makes sense to have a succession plan, which incorporates the following elements: (1) evaluation of succession goals for feasibility and compatibility and early inclusion of the offspring, i.e. proper mentoring & training, (2) gradual transfer of power, i.e. allowing for a smooth transition of management control, adjusting the job to fit the skills of the successor(s) by dividing the roles, (3) family & non-family members must be encouraged to participate in the succession process, (4) next generation family members' career, seniority, ages and need must be considered, and an inheritance plan must be developed and discussed with the family members, i.e. allowing only qualified competent family members to assume leadership roles in the firm increases the value of the firm for all who have an ownership interest in it (Moores and Barrett 2002). It is important though, that the succession plan is communicated and accepted by all family members. Hence, resolve conflict situations (assumption 1) and 'start planning early' (assumption 2) seem to be the most important imperative.

In the following paragraphs a qualitative study is presented to test the assumptions and answer the research questions.

EMPIRICAL STUDY

The paper reports a qualitative study by means of expert interviews (n=15) in the Tirol, Austria. In order to get an insight into various perspectives of family internal succession and to relate to the heterogeneity of the tourism sector, three stakeholder groups were surveyed. One group (n=5) were hotel entrepreneurs who will hand over their family business to the next generation in due time, the second group (n=5) were consultants, who mainly focus on consulting services prior and during succession, and the third group (n=5) were members of political pressure groups in tourism, which are also involved in succession processes. The type of interview was a semi-structured interview conducted personally face-to-face with the fifteen interviewees in May 2009. The data was taped and transcribed and content analyzed with Mayring's method of content analysis.

"Content analysis is a research technique for the objective, systematic, and quantitative description of the manifest content of communication" (Berelson 1952, p. 18). Qualitative content analysis defines itself within this framework as an approach of empirical, methodological controlled analysis of texts within their context of communication, following content analytical rules and step by step models, without rash quantification. Mayring's concept of qualitative content analysis was developed in the 1980s with the main idea "to preserve the advantages of quantitative content analysis as developed within communication science and to transfer and further develop them to qualitative-interpretative steps of analysis" (Mayring 2000, p. 2). The main steps within this method of content analysis are the steps of summary, specification and structuration with the main aim to reduce verbal data (word, word sentence, phrase, themes, etc.) into categories. This helps determine the presence of certain words or concepts within the text and reduces the text into manageable categories on information. Verbal data was analyzed by the two authors separately and subsequently controlled for inter-rater reliability.

MAIN FINDINGS

The next few paragraphs list the most important findings of the qualitative study. For each question presented, authors provide both, an overview in figures by listing counts and selected direct quotations from the verbal data gathered from the interviewees. First of all, authors were interested which characteristics family internal successors should dispose of when they take over the family business (see figure 3).

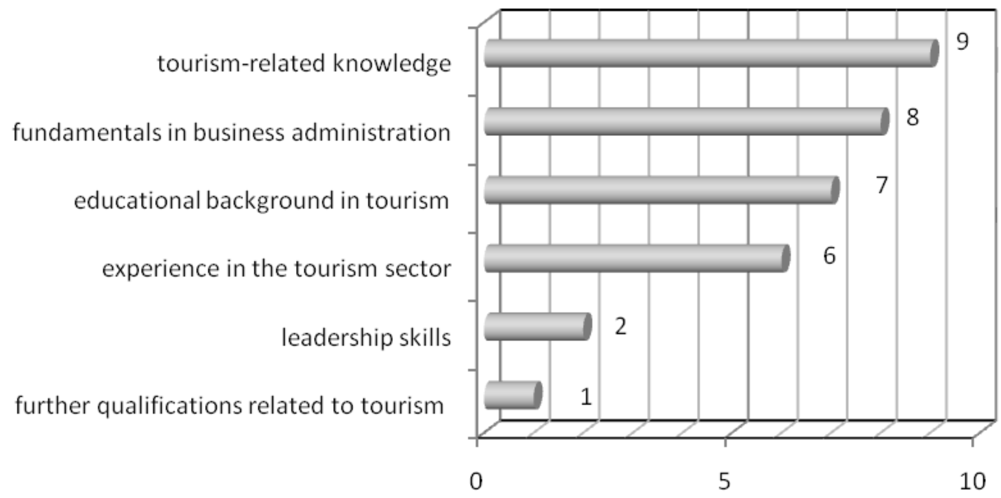

Figure 3. Most important characteristics of successors.

The content analysis produced six different categories, which interviewees articulated relating to the most important characteristics and qualifications of successors. Results show that the majority of respondents (n=9) said that tourism-related knowledge is essential for succeeding in a family business in tourism. One interview partner from the group of the consultants states as follows: *"I think it is essential for successors to have theoretical knowledge of tourism and/or working experience in the tourism field. Of course, it would be the best if a successor has gained both types of experiences. In the tourism field, it is important that you know how to deal with guests, even if they are sometimes a little bid nasty" (translated).* Secondly, fundamentals in business administration seem to be vital (n=8). One interview partner from the group of the hotel entrepreneurs who will hand over their family business to the next generation says in the interview: *"I did have hardly any background in business administration and was 'learning by doing'. However, my son, who will take over the business in about two years, he has graduated from the commercial academy and will therefore be much more qualified than I was some thirty years ago" (translated).* This is followed by an educational background in tourism, i.e. a university or high-school degree in tourism (n=7) and experience in the tourism sector (n=6). Another characteristic that a successor should incorporate are leadership skills (n=2). One interview partner from the political pressure group articulates as follows: *"Social competencies, especially communicating and handling guests, is of prime importance. In case a successor is lacking these competencies, the family company can be regarded as an 'empty' property, i.e. it still is a property, but no longer a tourism business. As far as my experience is concerned, this was one of the most prevalent problems of the last couple of years, which has led to an identity crisis of Alpine tourism service providers"(translated).* One interview partner (n=1) also stated that further qualifications related to tourism are important.

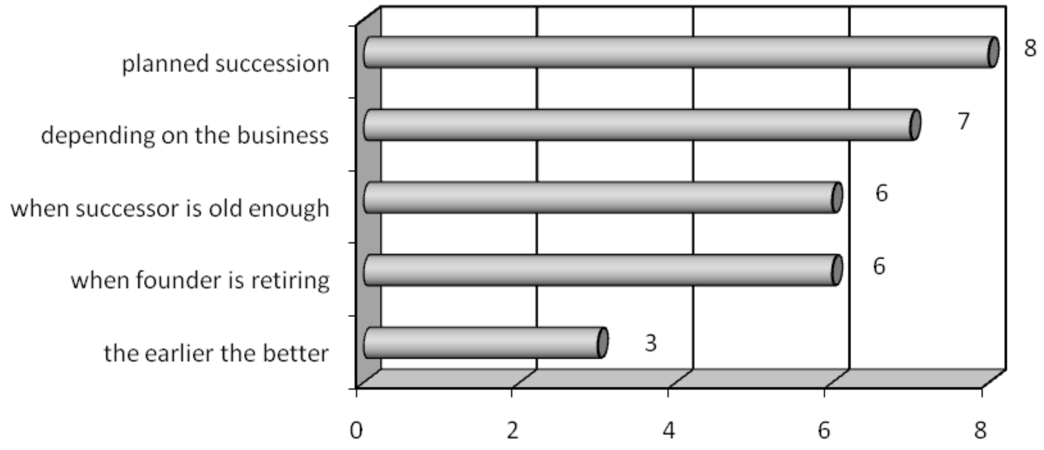

Figure 4. Ideal time for family internal succession.

According to literature, succession should be started already in stage 2 and be completed in stage 4 of the lifecycle of the family business (Burns 2001). Therefore, interviewees were also asked when they think the right time for family internal succession, respectively for succession planning, in tourism family businesses is (see figure 4). It is interesting to see that only three of the interviewees believe that succession should start the earlier the better (n=3), as literature suggests. One interview partner from the group of the consultants states: *"If you ask me, the successions which I went through as a consulting party, were too late, to be honest. I believe that a succession is the most successful the earlier one generation hands over the family business to the next generation. I think it's the worst case when this happens only shortly before the older generation retires. At least my experience shows that this is too late and traditions and values are so much integrated into the family business, that it is very hard for the successor to bring his ideas and values into the business" (translated).*

More than half of the interviewees (n=8) state that a planned succession is the best way of managing succession in family businesses. One interview partner from the group of the hotel entrepreneurs who will hand over their family business to the next generation states in the interview: *"I think that – be it earlier or later – the most successful way of succession is when it is planned beforehand. In my case, my son and I did already talk about the time and the way our succession will take place a couple of years ago. I think it is vital that both parts are integrated into succession planning. In my family, it was clear that my son is the one who will be the successor. And I think we have planned and organized the succession in a way it should work" (translated).*

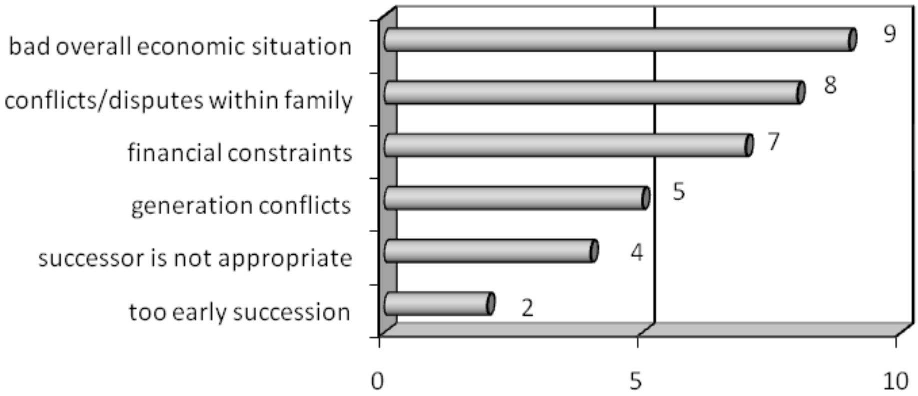

Figure 5. Reasons for intra-family succession failure.

Furthermore, it was interesting to know what the main reasons for family internal succession failure are. Interviewees mention the following reasons for succession failure: bad overall economic situation (n=9), followed by conflicts and disputes within the family which go along with the succession (n= 8), financial constraints (n=7), generation conflicts which often are due to the fact that the founder cannot let go (n=5), successor is not experienced enough to take over the family business (n=4) and the succession has been initiated too early (n=2). One interview partner from the group of the consultants for instance says: *"Internal succession can fail due to family conflicts, i.e. conflicts within the family which could not be solved before the succession. Another issue is the financial situation of a family-run business. If the financial starting position for a successor is bad, the harder it is to take over and maintain the business. Often, however, it is none of these factors but rather the missing experience of the successor, which results in situations where the successor is simply overstrained with the new task and burden" (translated).*

INTERPRETATION OF RESULTS

The topic suggests that it is a big challenge and responsibility to manage intra-family succession in family-run SME companies. On the basis of the findings of the literature review, the paper puts forward two assumptions regarding the management of intra-family succession in family firms, which shall now be discussed.

Assumption 1: Family conflicts might be problematic and hinder family internal succession.
As the empirical study shows, conflicts and disputes within families are seen to be the second most important reason for succession failure by 53% of the interviewees. Hence, it seems as if family internal succession, even if planned and managed, can be a stressful event and rise tensions among the family. As Burns (2001, p. 366) puts it, "the only way to resolve conflict in the family firm is to resolve conflict in the family". Relationship challenges are partly due to the nature of roles involved in a family business setting (Milton 2008). This means that after having understood the nature of the problem, the family needs to settle the conflict according to their family's values. Hence, assumption 1 cannot be falsified for the present empirical study.

Assumption 2: The time span of succession planning is essential for family internal succession success.

Literature argues that succession should be started already in stage 2 and be completed in stage 4 of the lifecycle of the family business. The empirical study confirms that the majority of interviewees (53%) believe that a very well planned transition is the best way of managing intra-family succession in family businesses. Contrary to literature, interviewees do not think that it is good to start succession the earlier the better (n=3). Another six interviewees say that it cannot be generalized when succession should be started as it depends on the individual business. Moreover, one interviewee admitted that firm external experience of successors is also vital before they take over the parents' firm. Furthermore, interviewees were asked to rate reasons for succession failure. While many of them think that the bad overall economic situation might lead to succession failure, a few also believe that a too early succession might fail. This is interesting as literature suggest starting succession as early as possible guarantees a successful succession (Moores & Barrett, 2002). However, interviewees cannot support this issue; hence the assumption for the present empirical study is falsified.

Limitations of the study

Before summarizing the contributions of this study, it is important to highlight its limitations. The present study has two major limitations that need to be taken into account when considering the results of the study and its contributions.

First, the results are based upon a small sample size (n=15) that should not be generalized to the population at large. This is a major shortcoming that might be explored and addressed in future research. Hence, to complete the overall picture, a broader survey among family-run tourism companies by means of a quantitative survey in the Tirol would be most valuable.

Another shortcoming of the study is that the authors only investigated intra-family succession and challenges that come up with this type of succession. No attention was paid to the various opportunities of external succession of family businesses, such as management buyout, management buy in, external management or liquidation. These forms of succession might present other issues to be considered.

CONCLUSIONS, IMPLICATIONS AND OUTLOOK

Family companies can be attractive due to the emotional support and helping hands which foster loyalty, responsibility, long-term commitment, and also ethical standards. There is, however, potential for conflicts as the family culture is essentially based on emotion, whereas the business culture is rather unemotional and task-oriented. Family internal succession can be one of the most troublesome issues (Zwick and Jurinski 1999). This is due to the entrepreneurial characteristics of the founder, father-son rivalry or the refusal to relinquish control. However, succession can be managed if it is started early in the lifecycle of a company and if it is planned accordingly. Succession in tourism family businesses has seen considerable change in the last few years. Succession goes away from tradition and leaves more and more the decision on succession to the founder, i.e. he decides about management buy-out, management buy-in, appointment of a professional manager, or even liquidation. This issue is largely agreed upon by interviewees.

Nevertheless, the results of this study have implications for managers and researchers. In terms of theoretical implications, the findings of the study make a valuable contribution to the debate on issues surrounding succession practice and raise awareness of the critical factors shaping ownership transition. In terms of practical implications of the study, results showed that there are potential prerequisites for taking over a family business and for planning an intra-family succession. The empirical survey reveals that tourism-related knowledge is one of the most essential qualifications of successors and that solid succession planning is one of the most crucial issues when it comes to generational succession of family businesses. Family businesses which are confronted with the challenge of succession in the future should bear these issues in mind in order to successfully complete their generational family business succession.

To conclude it can be said that the study discusses the challenges of family internal succession in family-run tourism businesses from a theoretical and an empirical perspective. As family dynamics is a crucial factor in the family business, the paper implies the need to involve founders and successors at an early stage of the company's lifecycle and to think about success factors of the succession process. However, increased research on the family dimension in tourism businesses will contribute to a broader understanding of family business dynamics and challenging issues like generational succession.

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