

Transgenerational Value Transmission: Socialisation Mechanisms in Indigenous African Business-Owning Families

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Abstract

Transgenerational value transmission (TVT) is a crucial ingredient for enhancing transgenerational entrepreneurship among business-owning families. Despite its importance, studies on values in family businesses reveal a limited understanding of how the next generation (NextGen) learn values from the senior generation family members. Our study aims to increase this understanding in the context of indigenous African business-owning families. More specifically, our objective is to explore the socialisation mechanisms used in transmitting values from one generation to the next in these families. Using 17 participants from seven cases, the results indicate that parents and extended senior family members are socialisation agents, and both parental and family practices are used as socialisation mechanisms to facilitate TVT in indigenous Black South African business-owning families. This study contributes to the family business literature concerning socialisation and TVT, and by doing so, we advance the scholarly understanding of socialisation theory in an indigenous African context. Indigenous African business-owning families could use the findings from our study to enhance the growth and survival of their businesses, as well as their entrepreneurial legacies.

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1. Introduction

Family businesses play a significant role in global (Miroshnychenko, De Massis, Miller & Barontini, 2021) and sub-Saharan African economies (Agyapong & Acquah, 2021) because they are seen as the driving force behind economic activities (Ruiz-Palomo, Diéguez-Soto, Duréndez & Santos, 2019) and job creation (Válková, 2014). Defining features of many family businesses include the participation of multiple family generations in the business (Garcés-Galdeano & García-Olaverri, 2020) and intra-family succession intentions (Cisneros, Deschamps, Chirita & Geindre, 2022). Families tend to build businesses that become family institutions (Monticelli, Bernardon & Trez, 2020) and it is the involvement of the family in the business that motivates the adoption of unique goals, governance structures and management processes in the family business (Chrisman, Chua, De Massis, Minola & Vismara, 2016).

Family businesses tend to have a stronger connection to their values and cultures compared to non-family businesses (Rau, Schneider-Siebke & Günther, 2019). This is possibly because family businesses are more value-laden than their non-family counterparts (Tàpies & Fernández-Moya, 2012). The dominant family culture prevalent in many family businesses is shaped by the beliefs and values deeply rooted in the family, its history, and social relationships (Zellweger, Kellermanns, Eddleston & Memili, 2012). These values are established by the founding members of the family business (Abdelgawad & Zahra, 2020) who desire the subsequent generations to uphold established traditions and core values when managing the business (Hall, Melin & Nordqvist, 2001). As a result, transgenerational value transmission (TVT) emerges as a significant differentiating factor between family and non-family businesses (Sorenson, 2014). For our study, we define values as the general moral principles, standards, ethical and behavioural norms that guide the human behaviour of a particular community (Koiranen, 2002; Schwartz, 1999; Schwartz, 1992).

Several scholars have highlighted that values are an important element of culture (e.g., Hellriegel, Slocum, Jackson, Louw, Staude, Amos, Klopper, Louw, Oosthuizen, Perks & Zindiye, 2017; Marcus, Ceylan & Ergin, 2017) and many (e.g., Garcia, Mendez, Ellis & Gautney, 2014; Hanel, Maio, Soares, Vione, de Holanda Coelho, Gouveia, Patil, Kamble & Manstead, 2018) have identified and underlined the similarity between culture and values. This similarity is well supported in the literature, and whether one speaks of values in general, or family values, both are considered elements of culture. The overlap between culture transmission and value transmission has caused several researchers in the field of TVT to consider these concepts as synonymous and therefore use them interchangeably (Huang, Cheah, Lamb & Zhou, 2017; Tam, Lee, Kim, Li & Chao, 2012).

In general, culture transmission refers “to the process by which information is passed from individual to individual” (Gong, 2010, p. 356) through the transmission of values, social orientations, skills, knowledge, and behaviours from one generation to the next (Schönpflug, 2009). Culture transmission implies that actions and beliefs are embedded in routine practices and interactions between people as agents (Brannen, Parutis, Mooney & Wigfall, 2011). Culture transmission is the planned or unintended process of transferring these cultural values from the transmitter to the transmittee (Schönpflug, 2009). Accordingly, the transmitter passes down the cultural values and the transmittee receives or consumes the cultural values passed on by the transmitter.

TVT appears to involve offering subsequent generations’ personal guidelines, values, symbolic resources and references more so than passing on objects or economic capital (Quéniart & Charpentier, 2013). Quéniart and Charpentier (2013, p. 60) further suggest that during the TVT process, the transmitters of values transmit “who they are” and “what they know.” From the seminal work of Hoge, Petrillo and Smith (1982) on TVT, it is evident that values must be transmitted from one generation to the next to maintain cultural continuity. Therefore, TVT involves transferring cultural values by socialisation agents to the NextGen members.

2. Problem description and research objective

Scholars have highlighted the need for and purpose of TVT (Susannah & Anna, 2014). For example, Tàpies and Fernández-Moya (2012) highlight the importance of TVT as values play a key role in the family and the perpetuation of the family business. In light of the current worldwide values crisis (Hanel, Wolfradt, de Holanda Coelho, Wolf, Vilar, Monteiro, Gouveia, Crompton & Maio, 2018; Sharma, 2014), the transmission of values, practices and other cultural elements, is viewed as an integral part of family businesses’ continuation (Arcand, 2012; Bika, Rosa & Karakas, 2019). If values are not shared and transferred to the NextGen, destructive conflicts can put the family and the family business at risk (Miller, 2014; Tàpies & Fernández-Moya, 2012).

Despite the importance of transferring values to the success of family businesses (Miller, 2014) and several research calls (e.g., Bika et al., 2019; Cunningham, Seaman & McGuire, 2016; Tàpies & Fernández-Moya, 2012), few studies have investigated socialisation processes in the context of TVT among business-owning families and their family businesses. Existing research on values in family businesses reveals a limited understanding of the socialisation mechanisms used to transmit values to NextGen members (Bika et al.,

2019), this despite business-owning families have a transgenerational intention, i.e., wanting to see their businesses survive over the long-term and benefit future generations (Azizi, Bidgoli & Taheri, 2021). Therefore, it is important to investigate whether the familial aspect of TVT hampers or facilitates the transgenerational intention of business-owning families and the performance of their businesses (Cunningham et al., 2016). Research should specifically be undertaken to reveal how values and culture are best transmitted through the generations (Denison, Lief & Ward, 2004). Although scholars have highlighted research gaps in understanding the socialisation processes, existing research on TVT does not account for the socialisation mechanisms business-owning families use in this process.

Given the above knowledge gap on the nature of TVT in the family business literature, the objective of our study is to explore the socialisation mechanisms used in transmitting values from one generation to the next in indigenous Black South African (IBSA) business-owning families. We selected and used IBSA business-owning family cases because most of these family businesses experience high rates of failure and are not sustainable (Nheta, Shambare, Sigauke & Tshipala, 2020). Ssekitoleko and du Plessis (2021) assert that indigenous African family businesses in South Africa lack the strength to live longer, complicating their prosperity and sustainability outlook. Therefore, we believe that using IBSA business-owning families allows us to look at possible familial aspects that could positively affect transgenerational success among family businesses in an African context.

Our study makes three contributions. First, we add to the ongoing scholarly debate in the family business literature concerning socialisation and TVT by exploring socialisation mechanisms used to transmitting values from one generation to the next in an indigenous African family business context. Second, our findings advance the scholarly understanding of socialisation theory in an indigenous African context. Third, we respond to several calls (e.g., Jaskiewicz, Combs, Shanine & Kacmar, 2016; Jaskiewicz & Dyer, 2017) to investigate family businesses by focusing on the family rather than on the business system, which we did by utilising socialisation theory rather than theories from business and economics. We believe that IBSA business-owning families could use the insights gained from the findings to enhance the growth and survival of their businesses and their entrepreneurial legacies.

The remainder of the paper is structured as follows: Using socialisation theory, we begin by describing socialisation as well as the various socialisation mechanisms in TVT. The methodology adopted is then described, and the key findings are presented and discussed. Finally, the implications for both theory and business-owning families are discussed, as are the limitations and directions for future research.

3. Theoretical background

3.1. Socialisation theory

The concept of socialisation is associated with theories of socialisation, theories that were originally pioneered by Talcott Parsons in the sociological literature. Parsonian socialisation theories propose a strong prediction of continuity and transmission of cultural values across generations (Pilcher, 1994), and socialisation is needed to ensure the continuity and stability of the functional needs of a society (Bika et al., 2019). Socialisation is also needed for TVT and is considered important to the family or society (Tamm, Tulviste & Martinson, 2020). The Sociologist perspective proposes that culture, including values, is built into social institutions and is passed on through socialisation processes (Kwak, 2003).

From the literature (Dang, 2020; Zhao & Zhang, 2020), a plethora of definitions of socialisation exist, but in general “involves the deliberate shaping of individuals to become adapted to the social environment” (Schönpflug & Bilz, 2009, p. 212). For our study, we refer to socialisation as “an ongoing process of learning the expected behaviours, values, norms, and social skills of individuals who occupy particular roles in society” (Robson, 2021).

The process of socialisation takes place in a person’s own cultural group, and is usually accomplished through deliberate shaping, formal instruction, and guidance provision (Berry & Georgas, 2009; Berry, Poortinga, Segall & Dasen, 2002). Early research on socialisation stresses the family as the most important mechanism in TVT (Hoge et al., 1982). Bisin and Verdier (2000) and Wyrwich (2015), concur that TVT in families occurs when parents apply socialisation efforts through spending time with their children so that their own values are instilled into their children. Spending time with their children ensures that the NextGen members learn about values by watching and listening to the senior (older) generation (Tàpies & Fernández-Moya, 2012). Furthermore, children are socialised into values and norms that they are likely to replicate in their own families in the future (Kolk, 2014).

3.2. Socialisation mechanisms in TVT

Socialisation takes place through certain social structures using certain mechanisms. These structures are known as agents of socialisation (Robson, 2021), and the mechanism as socialisation mechanisms (Lin, 2014). Socialisation mechanisms refer to the methods adopted that enable a person to learn from agents through communication, interpersonal interaction and shared experiences (Choi & Lee, 2002; Lin, 2014). It is these mechanisms that facilitate TVT and include, amongst others, parenting practices, family communication, instrumental conditioning, family routines, storytelling, and role modelling.

3.2.1. Parenting practices

Parenting practices are the most common mechanism for TVT (Schönpflug, 2001) and refer to the specific behaviours and actions that parents engage in to socialise their children into specific value sets (Anderson, 2011; Schönpflug, 2001). As stated by Raya, Ruiz-Olivares, Pino and Herruzo (2013), these behaviours and actions are mainly determined by their values and aims for socialisation. These aims for socialisation could include the parents' need for their children to develop appropriate attitudes or to acquire specific social and academic abilities (Raya et al., 2013). Examples of parenting practices include, amongst others, assigning home duties and the setting of boundaries. By setting boundaries for their children, parents specify what is acceptable and not in their family (Raya et al., 2013). Boundaries impose parenting restrictions such as rule-making and parental control on children (Yee, Lwin & Ho, 2017).

In the context of business-owning families, TVT also takes place by involving the NextGen members in the family business (García-Álvarez & López-Sintas, 2001). By being involved in the family business, parents share their values through mentoring and providing career guidance to NextGen (Zwack, Kraiczy, von Schlippe & Hack, 2016). Parents provide instrumental assistance and career-related modelling opportunities for their children in the family business context, which occurs when senior generation members provide the NextGen members with opportunities to learn and enhance their skills in managing the family business. Being involved in the family business offers children not only an opportunity to learn the values system that the family and the family business uphold, but also the skills needed to operate the family business (Garcia, Sharma, De Massis, Wright & Scholes, 2019).

3.2.2. Family communication

The concept of transmission originates in the literature on communication and information (Gungor, Sahin, Kocak, Ergut, Buccella, Cecati & Hancke, 2013). Segrin and Flora (2011, p. 13) define communication as a “transactional process in which individuals create, share, and regulate meaning.” Family communication processes help create and reflect on family systems and identity (Galvin, Braithwaite & Bylund, 2015). Vangelisti (2013) suggests that people learn to communicate through observing and interacting with family members, and in the process, they learn rules about social interaction and relationships. Parents can teach their children about values since all behaviour is communication (Segrin & Flora, 2011). However, if a child sees that certain values are important to their parent(s), they will accept the value sets of their parent through modelling those values (Chaplin & John, 2010).

Family communication should be viewed as the mechanism by which parents provide direction for and influence their children's moral values (White, 2000). Family communication ensures that children are continually exposed to family values (Segrin & Flora, 2011), and through using communication skills such as empathy, reflective listening and supportive comments, parents become aware of the needs and preferences of their children (White, 2000). The more frequent and open family communication is, the more likely that parents and their children will have a good relationship and, ultimately, the more aware of each other's moral judgements they will be (White, 2000).

3.2.3. Instrumental conditioning

Instrumental conditioning, also known as operant conditioning, is a learning method that employs rewards and punishment for behaviour (Jozefowicz & Staddon, 2008). Behaviour is primarily controlled by its outcomes (consequences), and these outcomes of a particular kind of behaviour in one setting can either increase or decrease the probability of such behaviour occurring in similar settings in the future (Poling, Carr & LeBlanc, 2002). In families, parents and family elders often use instrumental conditioning to modify children's learning and behaviour (Jozefowicz & Staddon, 2008). Parents use positive and negative reinforcement as conditioning mechanisms to teach their children about values and behaviours important to them (Kim, 2020). Positive reinforcement produces an appetitive stimulus or pleasant outcome using rewards to increase the likelihood that a behaviour will be repeated (Hellriegel et al., 2017). In contrast, negative reinforcement elicits a response that prevents an aversive stimulus or unpleasant outcome (Kajula, Darling, Kaaya & De Vries, 2016). Parents hope that by using restrictions and punitive strategies, they discourage their children from engaging in undesirable behaviours (Kajula et al., 2016).

3.2.4. Family routines

TVT occurs when family members interact during family routines or rituals (Reay, 2019; Tàpies & Fernández-Moya, 2012). Feldman and Pentland (2003, p. 96) describe routines as "repetitive, recognisable patterns of interdependent actions, involving multiple actors" that exist whenever groups of people interact repeatedly (Reay, 2019). Such family routines have been found to foster family identity, beliefs and values (Zellweger, Chrisman, Chua & Steier, 2019). Three types of family routines or rituals have been identified, namely family meetings, family celebrations and family traditions (Wolin & Bennett, 1984).

In business-owning families, family meetings are intended to maintain family relationships by improving communications, creating a platform (forum) for education, planning, and decision-making and creating accountability (Carlock & Ward, 2010). Family meetings often develop out of the business-owning family's need to clarify their aspirations and values (Carlock & Ward, 2010) and help expose the younger generation

to the family's traditions and processes (Carlock & Ward, 2010). While family meetings often acquaint the NextGen members with the family's shared visions and values, NextGen can make valuable contributions by providing new perspectives and articulating their values and intentions regarding the family business, for example. Routines or rituals, such as family celebrations (e.g., birthday, religious or traditional cultural celebrations), are carriers of the dominant values that the family believe in (Idang, 2015). Routines allow families to perpetuate their identity over time through these celebrations (Erdogan, Rondi & De Massis, 2020). Family values are passed down to the NextGen members and maintained through observing and celebrating family customs and events (Reay, 2019). Through sharing these customs and celebrating these events, family routines and rituals occur, allowing for the development of strong and supportive connections between senior and NextGen members, effectively enhancing TVT (Reay, 2019).

3.2.5. Storytelling

Segrin and Flora (2011) assert that family stories can function to socialise members, connect generations, and affirm belonging, as well as present implicit or explicit judgments about acceptable behaviour in a family. As observed by Brannen et al. (2011, p. 156), "family stories are the coinage of exchange between generations and are a form of intergenerational transmission." Paasch-Anderson and Lamborn (2014) concur that children learn about their ethnic heritage and can identify with their ethnic background through stories of their family's history told to them by their parents.

In their longitudinal study on TVT, Pratt, Norris, Hebblethwaite and Arnold (2008) found that stories of how parents taught the NextGen values were more likely to involve specific and shared experiences by the NextGen, which suggests a more compelling process of TVT. In their study, Zwack et al. (2016) analyse the transmission of family values in the context of business-owning families through storytelling. The results of their study show that the intended family values of the selected stories are perceived accurately by the individual recipients of those values. In addition, the authors found that the family story's effectiveness increases if the presented behaviour is familiar, evoking emotions connected to the family values represented in the family narratives or stories (Zwack et al., 2016). These emotions foster the basic assumptions of family values and enhance the effect of these values on family members and other stakeholders (Zwack et al., 2016).

3.2.6. Role modelling

Cruess, Cruess and Steinert (2008) highlight that role modelling is a powerful teaching mechanism for passing and sharing knowledge, values and skills from one person to another. Role modelling is a form of influence whereby children reproduce the behaviours of others through observational, imitation, and social

learning processes (Bois, Sarrazin, Brustad, Trouilloud & Cury, 2005). Role modelling as a socialisation mechanism involves role models who are admired for their ways of being, qualities, attributes, and positions. Positions that inspire others, such as role aspirants (Cruess et al., 2008; Paice, Heard & Moss, 2002). Others emulate the behaviours, styles and attributes of role models due to their influence over these others in one way or the other (Cross, Linehan & Murphy, 2017).

In the context of business-owning families, parents and family elders serve as role models through direct interactions with their children and through the example they set with their attitudes and behaviours in the family setting (Bloom, 2018; Choukir, Aloulou, Ayadi & Mseddi, 2019; Coto, Pulgaron, Craziano, Bagner, Villa, Malik & Delamater, 2019). The NextGen members observe, admire, and imitate behaviours exhibited by exemplary and influential role models in the family (Bandura, 1978; Donaldson & Carter, 2005; Morgenroth, Ryan & Peters, 2015). It is when the senior generation act as role models to the next that TVT occurs among them (Kenny, Mann & MacLeod, 2003).

4. Methodology

4.1. Research design

This study is positioned in an interpretative paradigm and uses a multiple and descriptive case study design to explore the socialisation mechanisms used by IBSA business-owning families in TVT. Our choice of interpretative paradigm is motivated by our ontological standpoint, which views IBSA business-owning families as encompassing diverse and unique social implications and encounters. As Saunders, Lewis, and Thornhill (2016) demonstrated, these distinct social meanings emerge from cultural backgrounds and cannot be universally applied to the entire populace. Furthermore, we consider acceptable knowledge subjective and constructed by humans (Maree, 2016; Creswell, 2013). Positioning our study in an interpretivism paradigm is supported by the views of Denison (1996), who states that a socially constructionist approach would be most suitable when investigating cultural issues that require one to appreciate the unique aspects of individual social settings. Our design also responds to scholars (e.g., De Massis & Kotlar, 2014; Fletcher, De Massis & Nordqvist, 2016) who argue that although qualitative studies are suitable for developing new theoretical insights, such studies are underrepresented in family business research.

4.2. Case selection and sample

Our sample consisted of seven IBSA business-owning families, meeting the following criteria: *(i)* see their business as a family business, *(ii)* are involved in the main operations of the family business with at least 50 per cent voting rights or share, *(iii)* have at least one active operating business, not only being a passive shareholder or investor, and *(iv)* should have a transgenerational intention, that is, an ambition to pass on the business to the NextGen members. We used the concept of “information power” to determine the sample size of the study, which posits that the larger the information power the sample holds, the smaller the sample size, and vice versa, needs to be (Malterud, Siersma & Guassora, 2015). Given the objective of the study, the specificity of the sample, the use of established theory, the quality of the interview dialogue and the analysis strategy adopted, a relatively small sample size of seven business cases was considered as having high information power. Table 1 shows the details of the participants and the family cases enrolled in the study.

4.3. Data sources and ethical considerations

Our study relied on semi-structured interviews, which were held with 17 key participants from the family and the family business. The duration of these interviews ranged from 30 to 265 minutes. The key participants had to be one of the following: a member of the most senior generation of the family business (e.g., founders or family elders), the current controlling family business owner or the Chief Executive Officer (CEO), a family member working in the family business representing a different generational perspective, a non-active family member, or a non-family member that has been involved in the business for at least five years. The interviews solicited information relating to the participants’ demographical background and the history of the family business. We also asked questions relating to the formation of and development of family values. Questions relating to TVT included “Is there value similarity between the senior generation and the NextGen members” and “How are values transmitted to the NextGen members.”

We utilised triangulation and member checking to enhance the trustworthiness (credibility) of the data and research findings. Triangulation involved collecting data from multiple sources or using different methods to ensure a comprehensive and well-rounded understanding of the topic under investigation (Saunders et al., 2016). By incorporating diverse perspectives, we validated and cross-validated the data we got from our participants, which bolstered the overall trustworthiness of our study. Additionally, we employed member checking to validate the data, which involved sharing the transcribed data with the participants and requesting their feedback on accuracy, completeness, and interpretation. In this manner, we ensured that their perspectives were accurately represented, further strengthening the trustworthiness of our findings.

Before conducting the research, ethics approval was applied for and granted by our affiliated university's Research Ethics Committee (Human). We solicited permission to undertake, recruit and enrol participants in the study from the gatekeepers of the business-owning families before the commencement of the data collection process. The identified interviewees were emailed an invitation letter and informed consent form, and were informed of their right to confidentiality, privacy and to withdraw from the study at any time if they wished to do so.

4.4. Data analysis

To explore the socialisation mechanisms used in transmitting values from one generation to the next in indigenous African business-owning families, we followed the six steps of reflexive thematic analysis as outlined by Braun and Clarke (2021) and Braun, Clarke, Hayfield and Terry (2019). Step one involved listening and transcribing the audio data verbatim into Microsoft Office Word documents, which allowed us to become immersed in the data. We proceeded (step two) to generate initial codes from the data using the different types and phases of coding. During the coding process, we labelled and organised items into meaningful groups (Bengtsson, 2016) using both deductive and inductive codes. In step three, we began identifying patterns and relevant meanings in the list of codes (Terry, Hayfield, Clarke & Braun, 2017).

This process signalled the beginning of theme development. During step three, we focused on sorting codes into initial themes while defining their properties. Step four involved reviewing and refining the themes by identifying coherent patterns in the codes. We continuously analysed the data aiming to reduce duplications and ambiguities in the meaning of the themes developed. Figure 1 summarises our data structure by showing how we progressed from first-order level codes to second-order level codes, and from second-order level codes to aggregate themes. In step five, we used the themes developed to conceptualise the story of each of the identified themes. This process helped us to respond to the research objective of our study. In the final step (step six), we focused on consolidating all the writings, including the field notes, to provide a concise account of the story told by the data (Braun & Clarke, 2006).

Table 1. Details of participants and cases

Case	Founded	Industry	Participant	Gender	Generation	Relation to founder	Role	Tenure	Interview duration (mins)
A	2005	Logistics	1	F	n/a	NFE	Financial Manager	11	90
			2	M	2nd	Son	Branch Manager	5	120
			3	M	1st	Founder	CEO	16	120
B	2002	Marketing	4	F	n/a	NFE	Employee	5	60
			5	F	2nd	Daughter	Manager	8	120
			6	F	1st	Founder	CEO	21	135
C	1981	Clothing	7	F	2nd	Daughter	CEO	9	265
D	1981	Laundromat	8	M	n/a	NFE	Operations Manager	10	65
			9	F	2nd	Daughter	CEO	6	86
E	1980	Funeral Services	10	M	n/a	NFE	Operations Manager	40	102
			11	F	2nd	Daughter	Non-active member	11	130
			12	F	2nd	Daughter	Employee	25	133
F	1974	Funeral Services	13	M	3rd	Grandson	Employee	5	96
			14	M	n/a	NFE	Office Manager	22	100
			15	M	2nd	Son	CEO	24	168
G	1973	Petroleum gas	16	F	3rd	Granddaughter	Operations Manager	5	125
			17	M	1st	Founder	Retired	45	33

n/a = not applicable, NFE = non-family employee

Source: Own compilation

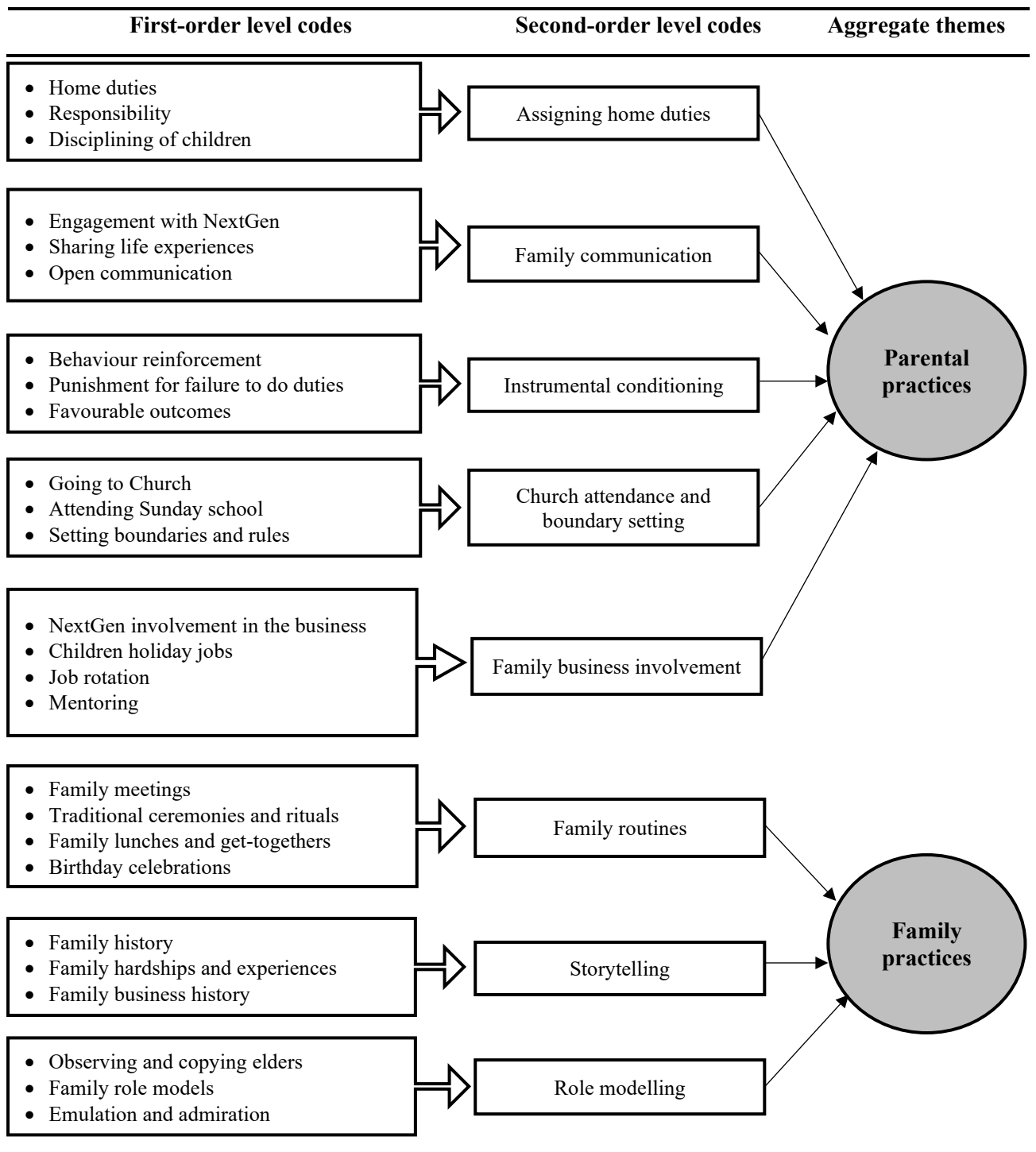


Figure 1. Overview of data structure
Source: Authors' own construction

5. Key findings and discussion

To achieve the objective of our study, we developed two related themes that describe the socialisation mechanisms used in transmitting values from one generation to the next in indigenous African business-owning families, namely parenting practices and family practices.

5.1. Theme: Parenting practices

Our analysis indicates that the participating business-owning families made (make) use of parenting practices to facilitate TVT. Parenting practices refer to the activities that parents engage in to encourage or facilitate the learning of values by the NextGen members or more specifically their children. Parenting practices have (are) not only been implemented by parents but also by grandparents when it comes to parenting children. The theme of parenting practices was developed based on five categories (sub-themes) that were evident in the data, namely assigning home duties, family communication, instrumental conditioning, church attendance and boundary setting, and family business involvement. The evidence supporting these categories is presented and discussed below.

5.1.1. Assigning home duties

The participating business-owning families facilitate the learning of values by the NextGen members by assigning them duties to perform at home. Parents assign home duties (chores) to their children so that values such as cleanliness, responsibility and hard work can be instilled in them. As Participant 11 explains, *“We used to yell ‘here comes dad’ and we used to rush to the house and make sure that [...] if the dishes were not washed, we would be washing the dishes. If our rooms were not tidy, we would be tidying them up. We knew that our dad would be coming in the house, he expected that there would be no dirty dishes, the house would be clean.”* Similarly, Participant 6 comments: *“Before going to school, we used to sell milk in the village. So, we had to get our pocket money, so we had our share of milk to deliver.”* Failure to attend to the assigned duties was (is) met with punishment. Children are disciplined by their parents so that they obey and listen to their elders. Assigning children home duties is common among parents who want to teach their children values such as hard work and discipline (White & Brinkerhoff, 1981).

5.1.2. Family communication

Our findings reveal that the senior generation members (parents) facilitate the learning of values by the NextGen through communicating openly and regularly with them. The NextGen are taught about the importance of the family as a safe space for them to share their life choices and decisions as well as the challenges they encounter outside the family. Participant 9 points out, *“we are very engaging with the kids, very open. Some of the things they get so embarrassed because we talk about everything, literally.”*

Participant 8 elaborates, “*around that table, there is communication that goes on, which comes with some nuggets too that they [children] learn during that dinner together; they learn things from the elderly ones, and some stuff gravitates.*” Through engaging and sharing in conversation, parents pass on the value set that is important to them to their children and where clear expectations about what values they should follow are communicated. Participant 2 explains, “*How they [values] are shared internally is that our parents are very open about who they are, what they want and what they expect from us as their children.*” As such, like many families, those participating in this study also use family communication as a mechanism to provide direction for and influence their children’s moral values (White, 2000) and to convince their children to internalise values that are pertinent to the family (Schönpflug, 2001).

5.1.3. Instrumental conditioning

Instrumental conditioning is used by the participating families to facilitate the learning of values by the NextGen members. According to Kajula et al. (2016), parents, like those participating in our study, hope that they discourage their children from engaging in undesirable behaviours by using restrictions and punitive strategies. Using mostly negative reinforcement for undesirable behaviour, parents socialise the NextGen into the family value system. Participant 3 explains, “*I will say ‘you are watching TV, why are you not finished that exercise that I asked you? Please can you get this exercise done, I need this exercise by tomorrow morning’. And I start raising my voice – Now he understands that business has come home.*” Similarly, Participant 2 comments, “*He can walk in and say, ‘I want you to do it now and I want you to do it this way’ and if I do not do it that way, I know I am going to get a slap on the wrists, one that comes with harsh words and everything.*” Through negative reinforcement, parents signal what acceptable behaviours are within the family. Participant 2 further remarks, “*So, he is right you know, in terms of disciplining me, whenever I have done things wrong, I believe that he would always make an example out of me.*” Similarly, Participant 12 explains, “*He hated to see like you [an employee] sitting there and somebody [customer] here waiting. So, you know, always in the back of my mind, uncle is here so [I must do the right things the way he wants].*”

5.1.4. Church attendance and boundary setting

Values are instilled in the NextGen members through regular church attendance, where the children are introduced to Christian values. Participant 12 explains, “*We used to go to Sunday school and as a kid your parents forced you to go to church even if you did not want to and now our kids growing up, they have choices. Sometimes we let them have the choice but still I think introducing them to church will build them up to be better people and the values that are in the Bible.*” According to Vermeer, Janssen and De Hart (2011), taking children to church is a religious socialisation process aimed at integrating children into a religious community. By taking their children to church and Sunday school, the

participating parents have integrated their children into the Christian community and have socialised them into Christian values.

Several participants pointed out that their parents had socialised them into a specific value system by laying down clear boundaries and rules as to what they could and could not do. These boundaries were particularly notable in terms of the children's exposure to television and radio. For Participant 9, her parents were clear in terms of this exposed at home, which meant the parents had control over what they watched or listened to. In addition to these boundaries, children are told what they can and cannot do. As Participant 11 points out, "*it's telling them, there are things that you know at my home we don't do them [...]. This is allowed, this is not allowed. [...] So, I try to be strict as well because if you do not have those boundaries for them, they are always testing, trying to see how far they can go.*" Furthermore, Participant 2 explains how his parents are very clear on, "*what they want and what they expect from us as their children.*" This finding concurs with that of Raya et al. (2013) and Yee et al. (2017) who report that through setting boundaries for children parents impose parenting restrictions that specify what is acceptable and what is not within their families.

5.1.5. Family business involvement

To facilitate the learning of values NextGen members are involved in the family business. They are given jobs to do in the family business during their school holidays, and those that work in the business as adults are given the opportunity to experience and undertake a variety of jobs. It was through working in the family business during their school holidays that the NextGen members were exposed to the value set of the family and through this exposure being socialised into this value set was facilitated. As Participant 13 comments, "*I got involved in the businesses from a very young age, I think I was in high school. I got involved in the business from an administrative point of view where we would help over the weekends.*" According to García-Álvarez and López-Sintas (2001), in the context of business-owning families the socialisation of values often takes place through involving the NextGen members in the family business. As in the case of the current study, Zwack et al. (2016) also note that parents share their values through mentoring and providing career guidance to NextGen members.

Most of the NextGen members were happy to work in the family business during their school holiday because of the benefits they received from doing so. Participant 9 explains, "*I'm going to be at that place the whole day. Well, I'm there the whole day because oh wait, at the end of the week, I'm going to get my R200 pocket money.*" According to Participant 13, "*We would record their [customer] names in the book with their monies, their change and all those things – needless to say some money went into [our] pockets but most of the money went to Participant 15 [laughs].*"

In all cases, the participating business-owning families continue to give their children jobs in the family businesses during the school holidays. In this way, the learning of family values among them is

facilitated. Participant 16 explains how she brings her young daughter to work at the family business and that her daughter enjoys coming along. Similarly, Participant 9 explains, “*We want them [NextGen members] to come and work in the [family] business here in Town 1 as part of their holiday stint in December – everybody’s going to work one week.*”

The involvement of adult NextGen members in the family business is such that they are given opportunities to experience and undertake a variety of jobs in the family business (that is, job rotation occurs). Participant 16 comments, “*for the longest time it has only been just my aunt and uncle that were doing everything [in the family business] but right now the idea is so that we get to know everything. So, from here I am going to move to our finance department to see how we are paying for invoices, who is doing what, why do we pay for certain expenses, and the levies we have.*” Similarly, Participant 3 comments, “*My son works in the business, he has gone through the ranks, he is an import and export manager, running that division of the business. He didn’t just jump on board and become a manager.*”

As such, through job rotation aimed at mentoring and preparing the NextGen members, they are socialised into taking over the leadership and management of the family business going forward. Participant 16 notes, “*At the moment my younger cousin is there [at the family business head office], so we chop and change so that everybody can know everything. But if the inevitable happens, or something happens to my aunt [now], we are preparing, and we know what’s going on [in the family business].*” Similarly, Participant 2 states, “*So yeah, it is the mentorship, it’s the growth, he has shared with us, it is the leadership he gives to us.*”

5.2. Theme: Family practices

The second theme developed was family practices and refers to the activities that the family (as a whole) engage in to encourage or facilitate the learning of values by the NextGen members, namely their children. This theme was based on three categories (sub-themes) of family practices evident in the data, namely family routines, storytelling, and role modelling. The evidence supporting these categories is presented below.

5.2.1. Family routines

Family gatherings and ceremonies such as family meetings, traditional rituals, and family lunches, as well as birthday and Christmas celebrations are used as socialisation mechanisms by the participating parents to facilitate the learning of values by the NextGen members. Participant 5 explains that family prayer sessions are important because they help keep them together as a family. Such family gatherings allow the family to sit, eat and share, which forges a sense of unity in the family. Similarly, Participant 9 remarks that family events such as family vacations and children getting together to discuss various

topics, while guided by senior family members, present opportunities for senior members to provide advice and guidance to the NextGen members, while instilling acceptable behaviours and family value sets.

Family gatherings and traditional ceremonies are done to preserve traditional family customs as well as socialise children into the value set upheld by the family. Participant 15 describes how his whole family participate in these ceremonies, *“at my mother’s funeral, after we have buried her, we were doing some traditional ritual – so that is all of us.”* Similarly, Participant 17 says, *“We usually do like thanksgiving and then we slaughter a goat when there are ceremonies, like funerals we cleanse and things like that.”* Furthermore, Participant 16 states, *“So, some things that we do in the African culture are against Christianity but in terms of personal space, I still do. Recently I had an [African] thanksgiving myself to say thank you for being able to purchase the vehicle that I have bought.”*

Our finding concurs with Reay (2019), who reports that TVT occurs when family members interact during family routines. As in the case of the current study, Zellweger et al. (2019) also note that family routines have been found to foster family identity, beliefs, and values. Black African families are commonly known for having family routines, which are used to organise and structure the family and their communities as well as to teach family and community values (Simões & Alberto, 2019).

5.2.2. Storytelling

Storytelling is also a socialisation mechanism used to facilitate the learning of values by the NextGen members. Participant 16 notes, *“that’s a story he loves telling everyone, so I think that’s where the values come from, which is loyalty and humbleness while you are in service.”* Storytelling is used to share the family’s historical backgrounds while reinforcing the value set that the family wants to transmit to the NextGen members. According to Participant 12, *“I always tell my children that I grew eating bread every day and eating meat and rice was for Sunday. To us that was normal because like he [her father] used to say that his father did not leave him with something. His father had cows, had everything but he left them with nothing because he gave to others, so you have to work for what you want.”* Similarly, Participant 11 narrates the stories her aunt told her, *“My mom [founder] was the eldest of four sisters. From the stories that I hear from my aunt when she got married, she took them with [and lived with them] because their dad had died, and she was the provider for them.”*

The stories that parents and family elders in the participating business-owning families share with NextGen tend to focus mostly on the hardships that the business founders and their families experienced before and during the start of their family businesses. While these stories are told to share experiences and, ultimately, family values by the parents (or elders), they are often used to inspire the NextGen members to learn value sets that will help them to achieve more in their lives. Participant 2

acknowledges that his father paved the way for him and his siblings by founding a successful business and says his father keeps challenging him to take responsibility in ensuring that the family business grows and continues to operate should his father pass on.

According to Hamilton, Discua and Jack (2017), storytelling is a form of knowledge that provides a sense of where the family and the family business come from and why they do the things they do. Similarly, Pratt et al. (2008) report that stories shared by senior generations are more generative, suggesting a concern and need for guiding the NextGen, and these stories are likely to involve specific and interactive occurrences which advocate for a more persuasive process of TVT. In their study on the nature and development of transgenerational legacy, Barbera, Stamm and DeWitt (2018) found that family stories and narratives prompt and sustain an entrepreneurship spirit across multiple generations through family values. In addition, the use of storytelling as a socialisation mechanism by the participating business-owning families is also supported by Parada and Viladás (2010) and Zwack et al. (2016). In an African context, it is common for African families to use stories to preserve the family and societal cultures and facilitate the learning of values and norms (Ogbu, 2018).

5.2.3. Role modelling

Role modelling is a common socialisation mechanism among participating business-owning families. The values adopted and copied by the NextGen members are those that they observe in the parents' (or elders') behaviours and actions. Participant 17 states, "*I cannot say how I taught them [the values], but they would see what I was doing, and they followed those values.*" Similarly, Participant 16 concurs that she had seen and observed how her grandfather (founder) and aunt operated the family business, and now she also operates the family business in that manner. Participant 5 remarks, "*It's one of those things I don't know if its consciously or deliberately, but it has been out of observing them [parents], that it has been instilled in me.*" Our finding corresponds with Więcek-Janka (2016), who reports that the collective cultures found among IBSA's place importance on treating their elders with high regard and admiration (respect), which is linked to the African philosophy of Ubuntu. Mayaka and Truell (2021, p. 651) define Ubuntu as a "philosophy based on generic life values of justice, responsibility, equality, collectiveness, relatedness, reciprocity, love, respect, helpfulness, community, caring, dependability, sharing, trust, integrity, unselfishness and social change." Ubuntu reflects an African perception of humanity, human dignity, and appropriate behaviours towards others (Nyoni, 2020).

Participant 12 further explains how her father's actions influenced their family in terms of the values they adopted. She says, "*But most of his siblings did the African ceremonies – the slaughtering and all those things. But my father refused because he said his father did not believe in that – so, that rubbed off onto us so even us [we don't do those things].*" The values adopted by the NextGen members are specifically those that they see and admire in the actions of their parents. Participant 9 comments, "*but*

they really admire what we do [as a parent].” Similarly, Participant 5 points out that, *“And those characteristics of hers [her mother] are the same things that drive and motivate me. If it were not for her [I would not be the person I am] – I have had the best role model.”* Similarly, Coto et al. (2019) contend that parents and family elders serve as role models through direct interactions with their children and through the example they set with their attitudes and behaviours within the family. According to Madhavan and Crowell (2014), many behaviours in IBSA families are modelled by parents and other senior family members.

In the participating families, parents serve as very strong role models, which children strive to emulate. Participant 2 explains, *“So, what makes the success of the [values] transmission is that I have always seen my parents as my role models [...] my role model is actually my father, because if I can be half a man that he is [then] I know that my children would be blessed. So, I think it is the need for me to be like my dad.”* As is the case in the current study, the families teach their children to respect senior family members and non-family members (Więcek-Janka, 2016).

6. Conclusions

Inspired by the literature (e.g., Azizi et al., 2021; Bika et al., 2019; Cunningham et al., 2016), which emphasises the need to investigate the familial aspects of TVT as facilitating the transgenerational intention of business-owning families and the performance of their businesses, our study explored the socialisation mechanisms used in transmitting values from one generation to the next in indigenous African business-owning families. Based on an analysis of seven IBSA business-owning families, we developed a model of how socialisation mechanisms can be used to transmit values among these families (See Figure 2).

Our analysis shows that family members are socialisation agents from whom the NextGen learn values that shape how they interact with the world. These agents, parents and extended senior family members, use different socialisation mechanisms to introduce value to the NextGen. Since parents are closest to their children, they often use specific parenting and family practices, which are rooted in their day-to-day parenting activities. As Anderson (2011) and Schönplflug (2001) highlighted, parenting practices are the specific behaviours and actions that parents engage in to transmit values to their children. Extended senior family members use parenting and family practices which do not occur in the day-to-day activities of parenting. However, in cases where the NextGen grew up with extended senior family members, such as uncles and aunts, these members play a parenting role in the lives of the NextGen and use the same mechanisms that their biological parents use. It is common in African families that all

senior family members, who are part of the extended family, contribute to bringing up and caring for the children (Copen & Silverstein, 2007; Obot, 2001).

Both parenting and family practices as socialisation mechanisms are crucial for successfully transmitting values, which lead to the internalisation of values by the NextGen members. For effective value internalisation to occur, the senior generation should use parenting and family practices depending on the need and situations their families may find themselves in.

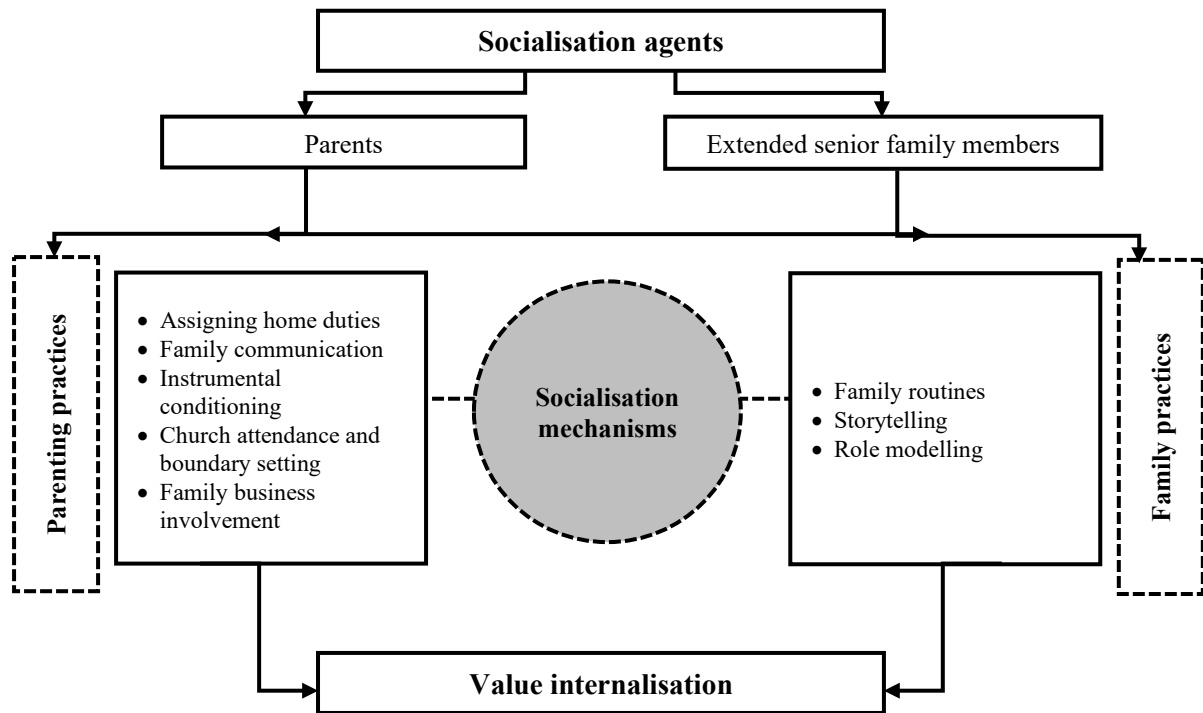


Figure 2. A model of socialisation mechanisms in TVT
Source: Authors' own construction

6.1. Implications for theory

Our study focused on the socialisation mechanisms used in transmitting values from one generation to the next in indigenous African business-owning families. We found that both parents and extended senior family members are socialisation agents and both parental and family practices are used as socialisation mechanisms to facilitate TVT.

Our study has contributed to existing research on socialisation in the context of family businesses in three ways. First, we provide a better understanding of the socialisation mechanisms used in the TVT process. We add to the ongoing scholarly debate in the family business literature concerning socialisation and TVT by exploring these mechanisms in a family business context. Our study also broadens the socialisation research agenda, adding a new dimension to our understanding of

transgenerational entrepreneurship in family businesses (Bika et al., 2019). As Basco et al. (2019) observed, transgenerational entrepreneurship in family businesses depends on the creation, development, and nurturing of specific resources necessary for family businesses to succeed across generations. Through socialisation and TVT, enterprising families transfer tacit knowledge, such as values and culture, to the NextGen members at an early age, both at home and in the family business (Cruz, Hamilton & Jack, 2012). TVT enables business-owning families to develop entrepreneurial orientations among the NextGen, which strengthens the family transgenerational entrepreneurship (Zellweger, Nason & Nordqvist, 2012), as they combine resources in unique and inimitable ways so that their businesses can enjoy a sustainable competitive advantage.

Second, by examining socialisation mechanisms in IBSA business-owning families, we advance the scholarly understanding of socialisation theory in an indigenous African context. We show that both parenting and family practices, are used by parents and extended senior family members as socialisation mechanisms to facilitate the learning of values by the NextGen. Socialisation mechanisms are needed in TVT to facilitate values continuity. As contended by Wyrwich (2015), the analysis of socialisation mechanisms in the TVT process is undertaken to enhance the understanding of sustaining the entrepreneurial longevity of family businesses across generations. According to Bika et al. (2019), TVT is viewed as an integral part of family and family business continuation and longevity. By examining socialisation mechanisms in TVT among IBSA business-owning families, new insights are provided which can possibly enhance the growth and survival of these businesses and their entrepreneurial legacies. Undertaking research on TVT provides insights into how families pass down values as legacies that frame the behaviour and communication of future generations.

Third, although there has been considerable development in sociological research and a theoretical shift in the wider socialisation literature, from Parsonian and structural-functionalist views of internalised socialisation, to a more dynamic and interpretivist theoretical approach (Abrantes, 2013a; Abrantes, 2013b; Pilcher, 1994), Bika et al. (2019) highlight that family business scholars investigating socialisation have demonstrated limited awareness of this theoretical shift and have paid less attention to sociological theories in understanding TVT. By utilising a sociological theory, namely socialisation theory, rather than theories from business and economics, we focus on the family system (business-owning family) rather than the business system and identify several socialisation mechanisms used by families intending to create transgenerational family businesses. Our study responds to several calls to investigate family businesses by focusing on the family (Jaskiewicz & Dyer, 2017), advancing family science theories from a non-Western or non-European perspective (Jaskiewicz et al., 2016). Therefore, we raise awareness of using sociological theories of socialisation for understanding TVT processes in an indigenous African context.

6.2. Implications for business-owning families

The main implication of our study is that business-owning families must be aware that different socialisation mechanisms can be employed to facilitate TVT. Parents and other senior family members transmit their values to the NextGen members when they continuously engage in specific activities that encourage the learning of values by NextGen members. Activities such as assigning home duties, encouraging children to attend and be engaged in religious events, and family gatherings, such as celebrating family rituals, may be effective mechanisms for TVT. Through various socialisation mechanisms, NextGen members are exposed to family and business value sets, which are important for their human and family survival and the continuity and survival of their family business.

Members of business-owning families are advised to use socialisation mechanisms that are inexpensive and effective such as storytelling and family business involvement. Storytelling can be used as a strategic device to reflect on past family situations and experiences which might bear the potential to be told in stories. According to Jaskiewicz, Combs and Rau (2015), business-owning families use stories to imprint the family's entrepreneurial legacy on the NextGen members, and it is these stories that bind the NextGen's entrepreneurial values to their senior's value sets and entrepreneurial actions. Given the historical backgrounds of all the participating business-owning families, stories reflecting these backgrounds and the hardships overcome play an important role in reinforcing the value set of the family. However, Zwack et al. (2016) point out that business-owning families should be careful not to share stories that may create negative perceptions and feelings among the NextGen members, causing them not to want to be associated with the family and the business. Desirable behaviours from business-owning family members should be encouraged and reflected in stories told in the family. This is particularly true if senior family members are to be viewed by the NextGen members as role models. The NextGen members observe, admire, copy, and emulate the behaviour and actions of the senior family members, making it easier for the NextGen to follow the values taught in the family.

NextGen members should be encouraged to work in the family business from a young age. Family business involvement allows them to be introduced to entrepreneurship at an early age, setting an entrepreneurial path for them to follow. Working in the family business creates opportunities for the senior generation to mentor and show the NextGen members how the family business operates and functions. Through their involvement, the NextGen members may develop values such as a sense of ownership and responsibility towards the family business, hard work and professionalism.

6.3. Limitations and directions for future research

Our findings should be interpreted in light of three limitations. First, the study was cross-sectional, which may have prevented us from fully investigating the nature of the participating business-owning

families in detail. We believe that, in the future, utilising a longitudinal design would assist in gaining more insights into the nature of business-owning families and the mechanisms they use to transmit values to the NextGen members. A second limitation is that although the participating business-owning families were drawn from indigenous Black African culture, these families themselves have different family structures and dynamics, as well as different generations leading their family businesses. This heterogeneity in the sample contributed to the nature of the data collected on socialisation mechanisms used in TVT in our study. Females lead most families that participated, as their senior male family members had already passed away, and most participating family businesses were in their second generation. To ensure more homogeneity in the sample, future research should be conducted on business-owning families with similar family structures and dynamics and on those led by the same generations. Because families have different family structures and functions (Jaskiewicz & Dyer, 2017), familial socialisation agents may experience different challenges in parenting their children, resulting in them using different socialisation mechanisms. A more homogeneous sample will enable researchers to compare whether there are differences in the types of values found in these business-owning families and how the NextGen members learn these values from the senior generation. A third limitation is that our small sample included only members from IBSA business-owning families. As a result, our findings may not apply to other cultural groups. Therefore, we recommend that future research include participants from different cultural and ethnic backgrounds to provide insights into the nature of TVT in a broader context. Extending this study to other population groups may assist in understanding the similarities and differences underpinning the nature of TVT among different business-owning families. We believe that a comparative study on a more homogenous sample will advance our understanding of the similarities and differences, if any, of the role socialisation plays in the TVT process.

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