

Transgenerational value transmission in business-owning families: an indigenous African perspective

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Abstract

Purpose – This study aims to investigate the favourable conditions that influence transgenerational value transmission (TVT), value acceptance and value similarity between generations in indigenous African business-owning families.

Design/methodology/approach – This study adopts a multiple case study design and draws on semi-structured face-to-face interviews to collect data from participants in seven indigenous Black business-owning families located in South Africa. The software ATLAS.ti was utilised to manage the data and reflexive thematic analysis was undertaken.

Findings – The analysis reveal four themes describing how transmission factors facilitate favourable conditions for successful TVT in IBSA business-owning families, namely, authoritarian parenting, a loving and connected family relational climate, the continuous reinforcement of autonomy during childhood development and family authenticity in the face of societies dominant values climate. Furthermore, value similarity is perceived to exist among the different family generations in the business-owning families.

Originality/value – This study is among the first to adopt the value acquisition model to empirically examine successful TVT and examine the extent of value similarity or dissimilarity, using the business-owning family as the unit of analysis. Novel contributions to family business literature and practices are proposing a model for TVT in an African context and studying relationships from a business-owning family perspective. The model for TVT could be used to socialise the NextGen members into value sets and behaviours that help business-owning families preserve their entrepreneurial legacy and family business longevity.

Keywords Family business, Next generation, Transgenerational value transmission, Value acceptance, Value similarity

Paper type Research paper

1. Introduction

Studies on transgenerational value transmission (TVT) (e.g. *Albanese et al., 2016; Dohmen et al., 2012; Open and Silverstein, 2007*) have consistently shown that the values of next generation (NextGen) family members are strongly associated with those of their parents and senior generations in general and that parents in particular play a crucial role in forming their cultural orientations (*Shin et al., 2020; Klingenberg and Sjö, 2019; Yan et al., 2016*). One of the most researched phenomena within the field of TVT is cultural continuity, which focusses on measuring the extent to which values have been successfully transmitted to NextGen members. Most studies (e.g. *Albanese et al., 2016; Dohmen et al., 2012; Knight et al., 2011*)



on TVT have analysed the degree of value similarity between parents and children. Successful TVT is generally measured by establishing the level of value acceptance displayed by the NextGen, and the degree of value similarity between one generation and the next (Freeks *et al.*, 2015; Boehnke *et al.*, 2009).

Scholars (e.g. Bika *et al.*, 2019; Zwack *et al.*, 2016) have also investigated TVT in the context of family businesses. For example, several studies (e.g. Barbera *et al.*, 2020; Erdem and Başer, 2010) examine the mechanisms through which values are transmitted from one generation to the next. In another study, Bika *et al.* (2019) explores the complexities of transmission processes by undertaking an in-depth case study of a four-generational Scottish family business. Recently, Erdogan *et al.* (2020) provide a family perspective on managing and imprinting traditional values in Turkish family businesses. Although these studies provide insights on family dynamics in family businesses, little is provided on the conditions (factors) that influence successful TVT, nor on the extent to which the NextGen members accept the value sets of the senior generation. For studies to not focus on such issues is somewhat surprising given that it is through transferring values across generations that family businesses distinguish themselves from their non-family counterparts (Matser *et al.*, 2015; Sorenson, 2014). Consequently, the factors influencing TVT, as conditions under which successful TVT takes place (Barni *et al.*, 2011), are misunderstood, threatening the functioning of the business-owning family and the family business (Miller, 2014).

While values are one of the most important factors influencing the transgenerational success and longevity of family businesses (Ruf *et al.*, 2021; Zwack *et al.*, 2016; Zellweger and Sieger, 2012), business-owning families and founders fail to successfully transmit their values to the NextGen (Alderson, 2011; Sharma, 2004). This failure may result in family businesses not growing or facing difficulties associated with sustaining the legacy of the family and the business by the NextGen members (Alderson, 2011). TVT is however essential for the entrepreneurial behaviour of families and how they preserve and transfer wealth and resources across generations (Zellweger and Sieger, 2012).

Our study aims to investigate the favourable conditions that influence TVT, value acceptance and value similarity between generations in indigenous Black South African (IBSA) business-owning families. Specifically, our study addresses the following research questions: (a) How do transmission factors facilitate favourable conditions for successful TVT in IBSA business-owning families? (b) Does value similarity exist among generations in IBSA business-owning families? Our study uses seven IBSA business-owning family cases. This context is illuminative because high failure rates are common among indigenous African businesses (Ssekitoleko and Du Plessis, 2021; Nheta *et al.*, 2020) which could be attributed to the failure of founders and business leaders to successfully transmit values to the NextGen members (Alderson, 2011; Sharma, 2004).

Investigating the favourable conditions that influence TVT, value acceptance and value similarity between generations in business-owning families helps researchers understand transgenerational cohesiveness in the context of a business-owning family. By adopting the value acquisition model, our study builds on prior research by showing that the theoretical concept of value similarity is embedded in the value acquisition model. Using business-owning families as unit of analysis, our study proposes a model for TVT in an African context. Our study reveals that the favourable conditions for TVT are familial and are premised on the senior generation's relationships with the NextGen. We, therefore, consider studying relationships from a business-owning family perspective a novel contribution to the family business literature. On a practical level, our study provides business-owning families and family leaders with important insights on how to socialise values to the NextGen in ways that could yield effective TVT. Similarly, family business practitioners and advisors could use our findings to strengthen the family bonds of the business-owning families and encourage open and honest communication within the family and the business. Effective

TVT is necessary for value continuity and maintenance and for the overall success and longevity of family businesses.

The remainder of the study is structured as follows: [Section 2](#) describes the theoretical foundations that underlie the study and [Section 3](#) describes the methodology adopted. Thereafter, the key findings are presented and discussed in [Section 4](#). [Section 5](#) discusses the proposed model for TVT. [Section 6](#) concludes by discussing the contributions to theory and practical implications, as well as the limitations and avenues for future research.

2. Theoretical foundations

2.1 TVT processes

TVT is seen as a process embedded in the interactions between people as agents ([Brannen et al., 2011](#)). It involves developing and transferring skills, knowledge and cultural elements such as norms, beliefs and values ([Quéniart and Charpentier, 2013](#)). Within the TVT process, three sub-processes have been identified: enculturation, acculturation and bicultural ([Padilla, 2006](#)). [Berry and Georgas \(2009, p. 95\)](#) define enculturation as “a general enfolding of the developing individual by one’s cultural group, often without specific instruction or teaching”. Enculturation involves “indirect absorption of norms and values through exposure and observation”, primarily occurring within the prominent cultural institutions and groups a child encounters ([Hynie et al., 2006, p. 230](#)). This exposure and observation lead individuals to incorporate appropriate behaviours into their behavioural repertoires, a process underscored by cultural exposure and observation ([Quéniart and Charpentier, 2013](#)).

On the other hand, acculturation stems from interactions and influences stemming from individuals and institutions representing cultures distinct from one’s own ([Whitehead et al., 2020](#); [Berry and Georgas, 2009](#)). Contrary to the notion that acculturation merely results from physical contact or superficial exposure to different cultures ([Thelamour, 2017](#); [Dennis, 2007](#)), [Sam and Berry \(2010, p. 472\)](#) define acculturation as “the process of cultural and psychological change that results following meeting between [different] cultures”. At the core of acculturation lies the concept of cultural borrowing, which highlights the exchange and adoption of cultural values, artefacts and norms between diverse cultural groups ([Williams et al., 2017](#); [Dennis, 2007](#)).

The conventional assumption in TVT research is that children are enculturated into a single culture ([Sam and Berry, 2010](#); [Padilla, 2006](#)). However, this conventional assumption overlooks the reality that many individuals belong to two cultural groups ([Padilla, 2006](#)), and their socialisation may involve exposure to and incorporation of values from two cultural orientations ([Haritatos and Benet-Martinez, 2002](#)). [Padilla \(2006\)](#) introduces the concept of a bicultural process, which describes the socialisation of individuals into two distinct cultural and value orientations. This bicultural process can occur simultaneously, influenced by one or both parents and other socialisation agents. It is recognised that children who experience one culture at home and another at school during their formative years often become socialised into more than one culture and value system simultaneously ([Blancero et al., 2018](#); [Lavelli et al., 2016](#)).

TVT is assumed to be enhanced by transmission factors (transmission belts) that act as favourable conditions for effective TVT processes in a particular socioeconomic and cultural context ([Schönpflug, 2001](#)). Various transmission factors have been identified, several of which are briefly described in the following sections.

2.1.1 Parenting styles. Parents are considered the primary agents in the TVT process; through their parenting styles, they become mediators of this process ([Brannen et al., 2011](#)). [Brenøe and Epper \(2022\)](#) argue that certain parenting styles prove effective, while others have the potential to hinder the transmission process. Several authors (e.g. [Schönpflug and Bilz, 2009](#); [Schönpflug, 2001](#)) concur that parenting styles fostering positive emotional

interaction between parents and their children are more likely to facilitate the successful TVT. In contrast, parenting styles characterised by rigidity and authoritarian often result in a significant emotional distance between parent and child, thereby undermining the TVT process (Schönpflug, 2001). Research also shows that different styles play an essential moderating role in transmitting parental values (Murray and Mulvaney, 2012). Therefore, for the effective transmission of values, parents should employ parenting styles that are suitable for their children's specific developmental stages (Kong and Yasmin, 2022).

2.1.2 Family relational climate. Family relationships play a crucial role in TVT, as families actively choose and highlight values that contribute to preserving their family identity (Prioste *et al.*, 2015). The relational atmosphere within a family, characterized by cohesion, conflict management and expressiveness, significantly influences the development and transmission of values to children (Stattin *et al.*, 2011). Positive familial relationships yield various advantages, including family harmony, high levels of trust and expressive interactions among family members (Kolak and Volling, 2007). These positive relationships collectively contribute to the establishment of familial climates that maintain interpersonal boundaries among family members (Kolak and Volling, 2007).

Similarly, quality relationships among family members create a "family-level emotional climate that identifies an intimate context within each nuclear family" (Vostanis and Nicholls, 1995, p. 299). Healthy family communication leads to positive family relationships, marked by acceptance, emotional support and a sense of safety among family members (Negy and Snyder, 2006). A family-level emotional climate plays a crucial role in fostering transgenerational continuity of values between parents and their children (Bengtson *et al.*, 2002).

2.1.3 Child development. Theories of developmental ageing posit that the dynamics of influence between parents and their children are shaped by the child's developmental stage (Prioste *et al.*, 2016; Roest *et al.*, 2010). Previous research on TVT (Danioni *et al.*, 2017; Prioste *et al.*, 2016; Barni *et al.*, 2011) has frequently focused on younger children and characterised the internalisation of values as compliance with parental expectations in the absence of direct oversight. In the context of younger children, parents are perceived to be more engaged in their child's life by expressing interest, possessing knowledge about their child's life and demonstrating investment in their child's choices and activities (Hardy *et al.*, 2008).

As adolescents, children often change how they perceive the values they have learnt from their parents (Schönpflug, 2001). This change is best explained by Prioste *et al.* (2016, p. 226), who state that during the TVT, "family generations may have different levels of adherence to social values". Adolescence is a phase marked by the exploration and development of identity, during which adolescents often explore values divergent from those instilled in their homes (Hardy *et al.*, 2008). However, as adolescents transition into early adulthood and beyond, they assume new roles that tend to realign their values with those of their parents (Min *et al.*, 2012). Research indicates that TVT is more pronounced in younger adolescents compared to emerging adults (Roest *et al.*, 2010). These TVT processes are influenced by the child's level of understanding and knowledge, with controlling variables such as the age of the adolescents playing a significant role (Schönpflug, 2001). Children may need to attain a certain level of maturity or social status to adopt the values to which their parents expose them (Min *et al.*, 2012).

2.1.4 Societal values climate. TVT is subject to influences beyond parental control (Vedder *et al.*, 2009). Boehnke (2001) proposes a model for fostering successful TVT, suggesting that values within intergenerational families are shaped by a contextual variable known as *Zeitgeist*, defined as the "modal current value climate of a society" (Boehnke *et al.*, 2009, p. 442). *Zeitgeist* represents the prevailing value context in a society shared by both parents and their children (Vedder *et al.*, 2009). Other scholars (Barni *et al.*, 2012; Knafo and Schwartz, 2003) characterise *Zeitgeist* as cultural stereotyping or the shared social conventions within

a specific community. Values widely endorsed by society require less effort for parents to achieve value similarity with their children, while values less supported by society demand more parental effort to ensure alignment (Schwartz, 1992). Families deviating from the dominant societal position on a specific social value, and distancing themselves from the majority, experience more successful TVT and greater parent–child similarity than families that do not (Boehnke *et al.*, 2009; Boehnke, 2001).

Values strongly emphasised by society as a whole show limited variability between parents and children since everyone in society tends to share these orientations (Albert *et al.*, 2009). Employing the Zeitgeist approach, families with a distinctive inclination towards hierarchic self-interest may either be highly competitive and entrepreneurial or strongly reject a capitalist self-enhancement outlook (Boehnke *et al.*, 2009). Values exhibiting high variability in society are likely transmitted more distinctly within the family, requiring greater parenting efforts and investments for children to internalise them (Albert *et al.*, 2009). Consequently, families aiming to convey specific family value orientations as desirable and good may need increased communication efforts between parents and children compared to families adhering to general societal values (Boehnke, 2001). Boehnke *et al.* (2009) underscore the challenge of getting children to accept and assimilate cherished family values versus the more widely accepted values of society.

2.2 Value acquisition model

The value acquisition model (Grusec and Goodnow, 1994) suggests that transmitting values across generations involves a two-step process of value internalisation. Value internalisation refers to “the extent to which the child accepts the values they are socialised into by their parents [...]” (Barni *et al.*, 2011, p. 108). The initial step involves the child accurately perceiving the parental message, while the second step entails the child’s acceptance or rejection of the perceived message (Barni *et al.*, 2011). Both steps are influenced by effective parenting, wherein parental practices play a crucial role (Prioste *et al.*, 2015). While TVT necessitates the intention to convey on the part of the sender, Quéniart and Charpentier (2013) emphasise that children’s receptivity is equally important.

Grusec and Goodnow (1994) point out that a child’s accurate perception of the parental message hinges on the attention given to the parents’ message and the clarity or redundancy of the message. The child’s acceptance or rejection of the perceived message, depends on the child’s motivation towards the message and the perception of the message as appropriate, serving as a facilitator of self-generated feelings (Grusec and Goodnow, 1994). In other words, a child’s interests in learning about family values and history is essential for the effective internalisation of these values (Quéniart and Charpentier, 2013).

After the child has gained an accurate perception of the parental message, Barni *et al.* (2011) assert that the process of acquiring values is further influenced by the degree to which the child believes that the values presented by parents are self-generated. For example, a child that values autonomy would want to believe that this value is developed and owned by themselves and not proposed by their parents. Motivating a child to pay attention to parental messages can be leveraged to support the child’s motivation to focus on and internalise parental values (Prioste *et al.*, 2017).

2.3 Value acceptance and value similarity

The value acquisition model suggests that the successful internalisation of values and TVT are measured in terms of parent-child value similarity or dissimilarity (Boehnke *et al.*, 2009; Fnafo and Schwartz, 2009). Also known as value congruence, value similarity is defined as the degree to which children hold a set of values that aligns with those of their parents (Boehnke *et al.*, 2009). Through TVT, families have the capacity to generate, perpetuate and

pass down their family identities to the next generation (Brannen *et al.*, 2011). Among the elements transmitted to the NextGen by these families is the family value system, which essentially defines the family's identity (Tam *et al.*, 2012). Despite the occurrence of TVT when there is value congruence between parents and their children, some scholars (Quéniart and Charpentier, 2013) argue that TVT does not necessarily result in a complete replication of culture in these children. Even though TVT takes place within a closed social context involving transmission agents, the act of TVT serves to facilitate the integration of the NextGen into society (Quéniart and Charpentier, 2013).

3. Methodology

3.1 Context and research design

To address our research questions, we designed an empirical qualitative study based on multiple cases, and to align this design, we adopted a postmodern or postcolonial indigenous research paradigm. It can be argued that this paradigm is ontologically relativist as it reflects the argument that the fundamental meaning of texts is in their reading and appropriation (Hassard and Cox, 2013). Therefore, postmodern paradigm helped us to provide a different perspective by investigating TVT among African business-owning families and their family businesses. Our epistemology assumptions are that shared meanings and knowledge are embedded in the values that help IBSA business-owning families understand the world around them. Using our study's research questions, the postmodern paradigm enabled us to question accepted ways of thinking in the field of values in the context of family businesses and allowed a voice to be given to alternative worldviews that have been silenced by dominant perspectives (Saunders *et al.*, 2016). As such, we adopted an inductive approach to theory development to construct meaning on how transmission factors facilitate favourable conditions for successful TVT in IBSA business-owning families.

While extensive research has been conducted on the topic of values in family businesses, with contributions from several scholars (e.g. Ruf *et al.*, 2021; Fathallah *et al.*, 2020; Fletcher *et al.*, 2012), it is worth noting that there is a glaring absence of studies that focus on values within the context of indigenous African business-owning families. The bulk of research on this subject has predominantly been centred in Western and European countries, exemplified by works like Gavriel-Fried and Shilo (2016), Strese *et al.* (2016) and Zwack *et al.* (2016), where cultural and value perspectives differ significantly. As suggested by Yan and Sorenson (2006), it is our contention that adopting an ethnic lens to investigate business-owning families and their family businesses could unveil both disparities and shared aspects across various ethnic groups.

Numerous family business scholars (e.g. Agyapong and Acquaaah, 2021; Acquaaah, 2011) have advocated for an increased emphasis on research concerning indigenous African family businesses and their business-owning families. Such emphasis is deemed essential to fully grasp the multifaceted nature, intricacy and diversity of entrepreneurial activities within the African context. Undertaking research into indigenous African family businesses not only aids researchers and practitioners in comprehending the cultural and economic distinctions inherent in these settings, as outlined by Acquaaah (2013) but also lays the foundation for the development of indigenous African management practices and theories. It is our belief that these practices and theories should be deeply rooted in African beliefs and value systems to provide a pragmatic framework for the effective operation of businesses in Africa, including indigenous African family businesses (Ogola, 2018).

3.2 Case selection

Based on Eisenhardt's (1989) recommendations of 4 to 10 cases, where the phenomenon of interest is transparently observable, we selected seven IBSA family businesses as the units

of analysis. To identify and select these cases we used purposive criterion sampling because the sample size was small, which often occurs in case-study research (Venter and Van Zyl, 2017), and it enabled us to identify and select information-rich cases related to the phenomenon under investigation (Palinkas *et al.*, 2015).

The selection criteria used was based on that of Habbershon *et al.* (2010), namely, (1) see their business as a family business, (2) be involved in the primary operations of the business with at least 50% voting rights or share, (3) have at least one active operating business, not only being a passive shareholder or investor and (4) have a transgenerational intention to pass on the business to the NextGen family members. In addition to these criteria, the business had to be independently owned and managed by an IBSA business-owning family, excluding members from the Coloured and Indian population groups. The exclusion of these groups is justified because their value and cultural systems differ vastly from that of the Black African population (Du Plessis *et al.*, 2015). After identifying the family businesses, we contacted representatives and sought permission for their participation. Our final sample (see Table 1) consisted of seven IBSA family businesses and 17 participants (units of observation).

3.3 Data collection

We employed multiple data sources to validate and cross-reference the findings (Jonsen and Jehn, 2009): multiple semi-structured interviews, secondary data, observations and field notes. Interviews were the primary data source and were conducted with key participants either face-to-face, by telephone or online. In five cases (excluding Case E and G), the interviews were preceded by a visit to the business premises. We conducted interviews with a total of seventeen key participants between October 2019 and May 2021, each serving as units of observation. These participants were carefully selected to represent distinct roles within the family business ecosystem and in doing so, we attempted to reduce potential bias in our findings. Key participants included individuals from various categories: (1) members of the senior generation, such as the family business founder or current leader; (2) those holding controlling positions, like the Chief Executive Officer (CEO) or chairman; (3) family members actively involved in the business; (4) family members with non-active roles; and (5) non-family members who had been engaged in the business for a minimum of five years. When

Case	Industry	Founded	Ownership generation	Ownership system	Ownership (%)	Active family member numbers	Employee numbers
A	Petroleum and gas	1973	Second	Pty Ltd	100	4	338
B	Funeral services	1974	Second	Pty Ltd	100	2	14
C	Funeral services	1980	Second	Trust	100	5	75
D	Laundromat	1981	Second	Pty Ltd	100	2	28
E	Fashion and Clothing	1981	Second	Pty Ltd	100	2	15
F	Marketing	2002	First	Pty Ltd	100	3	10
G	Logistics	2005	First	Pty Ltd	100	3	115

Table 1.
Description of cases

Note(s): Pty Ltd = Proprietary Limited Company
Source(s): Authors' own construction

participants from outside the family were willing and available, their inclusion allowed us to gather impartial insights and an outsider's perspective concerning values within the family business context. The interviews lasted between 33 and 265 min, and we recorded and transcribed approximately 32 h of individual interviews (see [Table 2](#)). Our University's Research Ethics Committee – Humans (REC-H) granted our study ethical approval.

3.4 Data analysis and coding

Our data analysis procedure followed the six-step process of reflective thematic analysis as outlined by [Braun et al. \(2019\)](#), which offered us a high level of interpretation during the analytical process ([Braun and Clarke, 2021](#)). In step one, we listened and transcribed the audio data verbatim into Microsoft Office Word documents while taking notes of information that stood out in the data. In step two, we generated initial codes from the data using the different coding cycles. Using the software program ATLAS.ti version 22, we began with open coding, which enabled us to identify the initial concepts from the data. In line with the theoretical approach adopted, we applied inductive codes on several coding cycles to develop first-order level codes, which helped us to compare, reorganise and focus codes generated in the previous coding cycles. The data coding process involved two authors to ensure consistency and reliability. In step three, we developed themes by sorting the generated codes into initial themes while defining their properties. Our fourth step involved reviewing and refining the themes by continuously reflecting and identifying coherent code patterns. We further identified relationships between the codes to enhance the internal consistency and reliability of our study's codes and themes. Step five involved reviewing and defining the generated themes. In this step, we conceptualised themes as both shared meaning and shared topics that underpin the central concept in the data. See [Table 3](#) for the final data structure and how we moved from first-order level codes to aggregate themes. In step six, we focused on consolidating the different range of writings, including the field notes, to develop the final report. To ensure neutrality and trustworthiness in the interpretation of the data collected, we incorporated direct quotations from participants to support our study's findings.

Case	Participant	Relation	Generation	Position in the family business	Tenure (years)
A	1	Founder	1st	Retired	45
	2	Granddaughter	3rd	Manager	5
B	3	Son	2nd	CEO	24
	4	NFE	NFM	Office Manager	22
C	5	Grandson	3rd	Employee	5
	6	Daughter	2nd	Employee	25
	7	Daughter	2nd	Non-active member	11
D	8	NFE	NFM	Manager	40
	9	Daughter	2nd	CEO	6
E	10	NFE	NFM	Manager	10
	11	Daughter	2nd	CEO	9
F	12	Founder	1st	CEO	21
	13	Daughter	2nd	Manager	8
G	14	NFE	NFM	Employee	5
	15	Founder	1st	CEO	16
	16	Son	2nd	Manager	5
	17	NFE	NFM	Manager	11

Note(s): NFE = Non-family employee; NFM = Non-family member

Source(s): Authors' own construction

Table 2.
Participants' details

Raw data – sample quotations	First-order level codes	Second-order level codes	Aggregate themes
<p>“I think primarily the success of transmitting values is just from my style of parenting.” (Participant 12)</p>	<ul style="list-style-type: none"> • A sense of appreciation towards parents’ parenting style • Children’s way of upbringing • An authoritarian parenting style 	Overprotective	Authoritarian parenting
<p>“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 expecting that there would be no dirty dishes, the house would be clean.” (Participant 7)</p>	<ul style="list-style-type: none"> • Controlling children’s behaviour • Parents assigning home duties • Parents act as disciplinarians 	Controlling	
<p>“I think this is what I love about my family, that there isn’t anybody pushing each other, and this one wants that, and that one doesn’t want this and this one is not speaking to that family member.” (Participant 2)</p> <p>“How they [values] are shared internally is that our parents are very open about who they are, what they want, where they come from and what they expect from us as children, and what they expect from us as adults.” (Participant 16)</p>	<ul style="list-style-type: none"> • Unity among family members • Extended family household relations • Family cohesion and support • Parent-child relationship • Communicating parents’ expectations • Open communication with children • Providing counsel to children • Family routines 	Strong family bonds and relationships	Loving and connected family
<p>“It’s something that we try to instil in them as they [children] are growing up, while they are young.” (Participant 3)</p> <p>“Because that is exactly what my mom has allowed me to do. I have always fostered that. Me trying to be true to who I am, and her always creating room for me to do that. So that each and every one of us has got something to offer. Understand it – own it and utilise it.” (Participant 13)</p>	<ul style="list-style-type: none"> • Children are taught values as they grow up • Sending children to school and University • Expressing freedom and independent thoughts and actions • Evaluating the self and thoughts • Voicing opinions and making own choices • Responsibility for one’s actions and choices 	Developmental stage	Continuous reinforcement of autonomy
		Independence and responsibility	

Table 3.
Data structure

(continued)

Table 3.

Raw data – sample quotations	First-order level codes	Second-order level codes	Aggregate themes
“In that big society and you see – you watch what other people do [. . .]. So, I also think just comparison and being exposed to other families.” (Participant 9)	<ul style="list-style-type: none"> • Undertaking actions/ behaviours appealing to society • Observing and imitating behaviours of society • Living as a member of a larger community 	Family reputation	Family authenticity
“The values that are in our culture together will take us far [. . .] They are [the values] coming from being Black, first of all, being African because you’re taught respect, you are taught to know the other person [. . .].” (Participant 6)	<ul style="list-style-type: none"> • Following the African cultural and value system • African traditional routines 	African cultural system	

Source(s): Authors’ own construction

4. Key findings and discussion

4.1 Factors facilitating favourable conditions for TVT

Our findings reveal four themes describing how transmission factors facilitate favourable conditions for successful TVT in IBSA business-owning families: *authoritarian parenting*, a *loving and connected family* relational climate, the *continuous reinforcement of autonomy* during childhood development and *family authenticity* in the face of societies dominant values climate.

4.1.1 Authoritarian parenting. Based on the literature highlighting that parenting styles influence TVT (Murray and Mulvaney, 2012; Schönplflug, 2001), our participants also note that the way they were brought up, that is, the style of parenting they were exposed to influenced the value set they have today. This is best described by Participant 2 who says “*But upbringing is of the utmost importance. You take values from how you are brought up. You do things that you are used to doing from when you were young. So, things like working hard, we started working at an early age*”.

Our findings suggest that the style of parenting that the NextGen were (are) exposed to is perceived by them as controlling and overprotective. As children, not having room to negotiate with their parents means that they were (are) confined to doing only what their parents allow(ed) them to do. For example, Participant 3 explains, “*Because we had a stubborn mother who did not want us to interfere and wanted to do it all – [laughs] and she was strict, and everybody was afraid of her*”. Our findings suggest that the authoritarian parenting style of the senior generation has been one where children were (are) given explicit instructions and forced into doing things by their parents, and that this has had a positive influence on their value set. This finding contradicts several authors (Schönplflug, 2001; Darling and Steinberg, 1993), who assert that rigid and authoritarian parenting styles often lead to distance between parents and their children, undermining the TVT process. The presence of an authoritarian parenting style, commonly found in most collectivistic cultures, where a focus is on social outcomes or group-oriented values rather than individual ones (Prioste et al., 2015), could possibly explain for our observed contradiction. Several authors (Rudy and Grusec, 2001; Grusec et al., 1997) highlight that in collectivistic social groups, children tend to inhibit their own desires and needs, are required to align themselves with the larger group and are encouraged to attend to the needs of others.

Despite being perceived as authoritarian and strict, our findings show that this parenting style is appreciated and copied by the NextGen as adults. As Participant 16 states, “*It is tough love, there is nothing more tough than a parent’s love. As tough as it may come out and as tough as it may be, it is the most raw and genuine love you would ever get, because they love you so much that they are going to be tough on you*”. Participant 7 remarks, “*I told my dad; I am thankful for it. I now know that I would not be where I am if you had not been that [strict towards me]*”. This appreciation possibly contributes to the current generation adopting and using the same parenting style with their own children that their parents used on them. A style that is strict, controlling and overprotective and one of not spoiling their children by giving them everything they want. Based on these observations, we develop our first proposition:

Proposition 1. An authoritarian parenting style facilitates successful TVT in IBSA business-owning families.

4.1.2 Loving and connected family. Our findings reveal that strong family connections (bonds and relationships), among the participating nuclear and extended family members, including the NextGen members, characterise the family relational climate. These connections and the love prevailing in these business-owning families form the basis for favourable familial relations. Such relations create favourable condition for the NextGen to learn the values their parents want them to uphold. As Participant 7 states, “*It is that family unity [that exists] that you are able to move from your home to someone else’s, but you know that just because these are not your parents, you still have the upbringing, the things that you were taught from your home, are implemented in this home because it is the same*”.

Our findings also reveal that where favourable relational climates do not exist, bonds are not created and TVT is problematic. For example, in Case F, an emotional detachment was found to exist between the senior generation (mother) and her daughter. Participant 12 (mother) states, “*Sometimes I think I come across as being cold, I am not going to be defensive on that, especially with my daughter. I grew up not knowing my mother, I had no relationship with my mother, so I do not know a mother type relationship. I think because of that, I battled to transfer that [mother-type relationship] into a mother-daughter relationship*”. Participant 13 (daughter) concurs by pointing out her frustrations, saying that although all her physical needs were met: “*She was a mom, but not necessarily a mother, because we did not spend time and bond*”. Our findings concur with [Stattin et al. \(2011\)](#), who contend that a family relational climate characterised by family cohesion and conflict management influences the transmission of values to the NextGen members. With positive familial relationships, the family enjoys a range of benefits, such as family harmony and high levels of trust ([Chaudhary et al., 2021](#)). Such benefits ultimately build family relational climates that maintain interpersonal boundaries between family members ([Adjei et al., 2019](#)).

Furthermore, our findings show that a family relational climate characterised by constant and open communication, as well as regular routines, also influences value transmission to the NextGen. Parents and other senior family members create spaces for engaging with the NextGen on issues relating to career and life choices. They want the NextGen to see the family as a safe space where opinions can be viewed, and challenges faced can be discussed. These open and engaging family spaces allow parents to communicate their expectations of their children, influencing the value sets their children are expected to have. Through open communication, the senior generation members cultivate a value set that prevents harmful behaviours among the NextGen. The literature suggests that open communication and regular routines lead to increased expressiveness among family members and a positive family relational climate ([Stattin et al., 2011](#)), which facilitates TVT. Based on our findings, we develop our second proposition:

Proposition 2. A loving and connected family relational climate facilitates successful TVT in IBSA business-owning families.

4.1.3 Continuous reinforcement of autonomy. In line with the literature (Prioste *et al.*, 2016), we found that the senior generation members introduce and instil values into the NextGen members from a young age, while they are still growing up. Participant 9 states, “*I think when they were younger, there was a deliberate effort to dispel this myth that girls can only do pink, do soft skills and all that. Everybody can do everything. So, even now, he can cook and clean, can do everything that girls can do. And the girls can do everything that he can do*”. Our study further reveals that the NextGen exhibited greater receptivity to the values imparted by their parents during their formative years, providing tangible evidence of successful TVT during this crucial stage of child development. Consistent with broader research findings, studies by Min *et al.* (2012), Roest *et al.* (2010) and Schönplflug (2001) emphasise that values are predominantly taught and internalised during early childhood. In alignment with our study, Hardy *et al.* (2008) observe that parents tend to be more actively engaged in their children’s lives during their younger years, investing in activities and learning processes that contribute to the effective learning of values among them.

Our findings also show that the senior generation members continuously reinforce(d) the values of independence and taking responsibility for their actions and choices among the NextGen. NextGen members are allowed to voice their opinions on personal, family and family business matters, and by doing so, they show that they have internalised the value sets shared by the senior generation. As Participant 16 comments, “*They [my parents] will never dictate what they want us to do in life [. . .]. It is just that when I started growing up, I started saying; I have my own life, you know I have got my own things*”. Similarly, Participant 13 comments: “*She has always created room for me to do that [voice opinions]*”. Our findings suggest that TVT is achieved when value internalisation among the NextGen occurs at a young age and when the senior generation nurture independent thinking and reinforce autonomy among them. However, our findings contradict Schönplflug (2001), who suggests that as a child’s autonomy increases with age, a level of resistance towards the value sets of their parents is observed, which harms the effectiveness of the TVT process. This contradiction could be explained in terms of cultural reverse feeding, which refers to “the process by which the younger generation passes on a culture and its meaning to the older generations” (Xiaohong, 2012, p. 47). We found that because most of the participating NextGen members started working in their family businesses at a very young age, as adults they influence the attitudes and values of their parents through being given opportunities to voice their opinions on business matters. Therefore, given the above considerations, we develop the following proposition:

Proposition 3. The continuous reinforcement of autonomy facilitates successful TVT in IBSA business-owning families.

4.1.4 Family authenticity. The values climate prevailing in the society where the participating families reside influences the success of TVT to the NextGen members. Our findings suggest that it is easier for the business-owning families to socialise the NextGen into a value set that is generally acceptable in their community, as these NextGen family members observe and tend to imitate what others from their communities do. The participating business-owning families believe that they are part of a larger community. As such, they strive to protect their family’s reputation. Participant 9 explains, “*If the values make you more endeared to society or people, because basically, you see how they operate, if you do things that way, then they work*”. Similarly, several scholars (Boehnke *et al.*, 2009; Vedder *et al.*, 2009) contend that the prevailing values of society impact the TVT process in ways beyond parental control. Furthermore, Boehnke *et al.* (2009) highlight that TVT is significantly more robust in families distant to the acceptable societal value set.

Our findings also reveal that the participating business-owning families follow their African cultural and value systems. Since the dominant societal value system shapes the values of the business-owning families, the senior generation ensures that the NextGen members uphold their African cultural values and beliefs. Participant 12 explains, “*I think the environment that we live in as people has an influence on the success of transferring values to the younger generation*”. Similarly, Participant 7 explains, “*Being African knowing that you need to respect your elders. Learning to know that whether or not they are blood, if someone is older than you, then you need to respect that*”. Our findings suggest that their African culture shapes the values that senior generation members socialise the NextGen members into. The business-owning families prioritise creating shared experiences and traditions that reflect their African values. These shared experiences, created by having African traditional routines, model how the NextGen members perceive the shared values in the family. When the senior members are authentic and practice, through African traditions and routines, their values consistently, it creates a strong sense of identity for the business-owning family, which makes it easier for the NextGen to accept the same value sets. Prioste *et al.* (2015) maintain that families select and emphasise the values that better contribute to preserving family identity. Against this background, we present the following proposition:

Proposition 4. Family authenticity facilitates successful TVT in IBSA business-owning families.

4.2 Value similarity among different family generations

TVT can be considered successful in the participating business-owning families if evidence of value acceptance and similarity exists. Value acceptance by the NextGen members leads to value similarity between them and the senior generation (Frecks *et al.*, 2015). Value similarity occurs when the NextGen uphold the same values as the preceding generations (parents) (Boehnke *et al.*, 2009). Our findings reveal that value similarity is perceived to exist among the different family generations in the business-owning families. For example, in the Case C, Participant 3 (second-generation) mentions, “*I think they [NextGen] have taken the family values of respecting other people, and always they are down to earth*”. Another example is evident in Case G where the first-generation business founder, Participant 15, says “*I think they [his children] do uphold similar values. You know what, they say apples do not fall far from the tree*”.

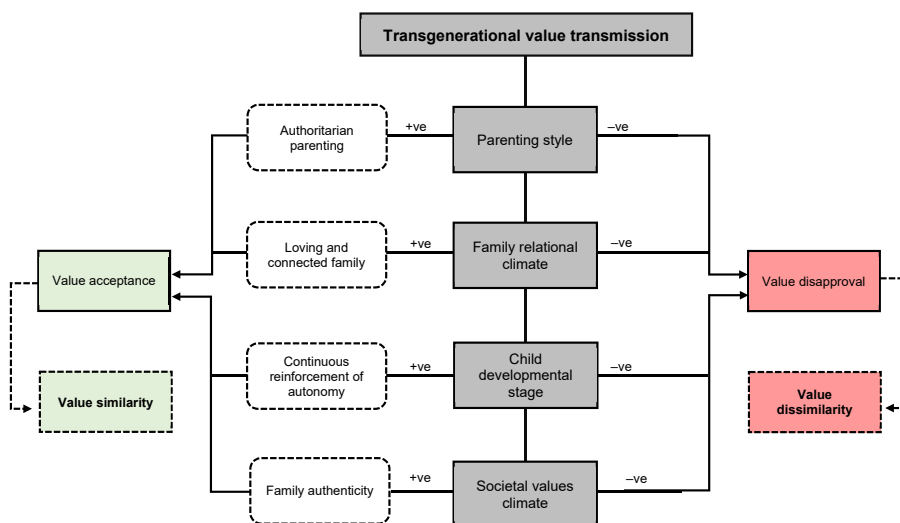
Our findings reveal that most NextGen members have embraced and internalised the values imparted by the senior generation, earnestly endeavouring to uphold and embody these values. Due to a profound respect and admiration for the senior generation, the NextGen have largely sought to emulate and replicate their behaviours. The NextGen point out that their adoption of similar values to their parents is rooted in a shared appreciation for same things that their parents do or did, such as preserving traditional ceremonies or not. Moreover, the NextGen express a desire for the same foundational elements, such as love, commitment to marriage and dedication to the family business, that their parents possessed or currently possess. Participant 9 (second-generation member) explains: “*Everyone is always telling me that I am completely my father’s daughter and my mother’s daughter. My mom says I have got the deadly combination of both*”. Similarly, the NextGen members have adopted values similar to those of their parents as they tend to do the same things that their parents do or did. Participant 2 (third-generation member) explains, “*I think I am yet to see anyone in our family who does something differently from what we are doing. Even in how we handle ourselves in public or with people [. . .]. So, I think because I have never seen anybody do differently, I think it is instilled in all of us*”. Successful TVT among children is intrinsically influenced by the children’s willingness to adopt (value acceptance) the perceived value sets of their parents (Danioni *et al.*, 2017), influencing the internalisation of their parent’s values (similarity) among the NextGen members (Trubshaw, 2014).

Our findings do, however, show that, to a lesser extent, some value dissimilarity does exist among the different family generations of the participating families. As Participant 12 explains, “Despite that ability or God-given talent, the value that she did not embrace is hard working, the workaholic thing [. . .]. But it is not always the case that children imitate what they see their parents doing”. Similarly, Participant 2 says, “Look, not everyone will flow with where the family is flowing”. Value dissimilarity is noticeable as the younger NextGen members exhibit a stronger embrace of self-direction and independence compared to their elder counterparts. This dissimilarity could be attributed to some senior generation members perceiving their children as autonomous individuals with a need to cultivate distinct personal identities, possibly divergent from their own or the family’s collective identity. Furthermore, while maintaining respect for their parents’ contributions, the NextGen members have subtly infused fresh perspectives into family enterprises, introducing innovative approaches to business operations. As [Ter Bogt et al. \(2001\)](#) underscore, adolescents typically forge their own identities and value systems, often differing from those of the older generations.

5. A proposed model for TVT

Our study explores how transmission factors facilitate favourable conditions for successful TVT in IBSA business-owning families. The inspiration behind this research stems from literature that highlights the important role that TVT plays in ensuring value continuity in business-owning families as well as the longevity and success of their businesses.

Based on an analysis of seven case studies, we propose a model of factors influencing value transmission in IBSA business-owning families (see [Figure 1](#)). Our model highlights the positive influence of the factors identified in our study but also provides a generic model applicable to other contexts. As suggested in literature ([Freeks et al., 2015](#); [Boehnke et al., 2009](#)), the success of TVT is generally measured by establishing the level of value acceptance displayed by the NextGen and the degree of value similarity between the senior generation of



Note(s): +ve = positive (favourable), -ve = negative (unfavourable)

Source(s): Authors’ own construction

Figure 1.
Proposed model for TVT in IBSA business-owning families

family members and the next. Our findings show that value acceptance and similarity tend to occur when the senior generation members make use of and promotes an authoritarian parenting style. Although the adoption of a rigid parenting styles, such as an authoritarian one, generally lead to an emotional distance being created between the parent and child, thus undermining the transmission process (Schönpflug, 2001), we theorise that in the context of indigenous Black African families, a rigid type style may be seen as practical given the circumstance that contribute to value congruence between one generation and the next. That this style contributes to successful TVT in the context of indigenous Black African families, which is further supported by the NextGen appreciating and copying this style as adults.

Strong family connections, relationships and communication among the family are favourable conditions that shape the family climate as a safe space where the senior generation members can cultivate values among the NextGen members. Such a loving and connected family relational climate enables the family to have routines through which the senior generation can communicate and thus transmit the value sets to NextGen members. Schönpflug (2001) describes that positive emotional interaction between generations is most likely to encourage the transmission of values. A positive emotional interaction and harmony (Birgach and Habba, 2023) among family members can result in a positive perception of family relationships, which is marked by characteristics such as acceptance, love, emotional support and feelings of safety. Such interactions facilitate the continuity of values across generations (Ahmad *et al.*, 2021).

Given our study findings, we concur with the literature (e.g. Prioste *et al.*, 2016) that the extent to which the NextGen members accept and internalise the value sets of the senior generation depends on the stage of development that the NextGen members are in and the involvement of their parents during these stages. When senior generation members are involved in the lives of the NextGen while they are growing up, family values are seen and learned, resulting in the children developing their own value set that is more likely to be aligned to that of their parents. Therefore, we theorise that from a young age, the senior generation members create favourable conditions that reinforce values such as autonomy, allowing the NextGen members to be individuals with independent opinions and values. Our theory is supported in that several NextGen members have opinions and values that differ from those of the senior members.

While the general literature on value transmission (e.g. Albert *et al.*, 2009) asserts that societal values climate contributes to the general success of TVT, we advance that this may only hold if the business-owning family's value orientation is congruent with that of the prevailing value system in the community they live. Business-owning families that are authentic (true to themselves) towards their value orientation are more likely to positively influence the transmission of value to the NextGen members than families that are not. By being authentic to the family identity and family value system, NextGen members can effectively accept the value sets taught to them by the senior generation members. Therefore, we advance that the family being true to itself is a critical factor that creates favourable conditions for successful TVT among NextGen members. Once NextGen members accept the value sets taught by the senior generation, it becomes easy for value similarity to exist between generations.

6. Conclusions

6.1 Contributions to theory

In addition to proposing a model on TVT, our study makes several contributions to theory. Firstly, it is among the first to adopt the value acquisition model of Grusec and Goodnow (1994) to empirically examine successful TVT and to examine the extent of value similarity or dissimilarity, using the business-owning family as the unit of analysis. The theoretical

concept of value similarity is embedded in the value acquisition model (Barni *et al.*, 2019), which can be extended to explain the TVT dynamics between the senior generation and NextGen members. In our study, we advance that value acquisition exerts different effects, such as value similarity between the senior generation and the NextGen, facilitating a mutual understanding of life goals and personal preferences concerning the family business (Lee *et al.*, 2019). In contrast, value dissimilarity leads to difficulties and barriers in TVT and family business management because it triggers friction and conflicts in communication and misaligned role expectations.

Secondly, the value acquisition model provides an opportunity to better understand the factors influencing the successful TVT. Our study reveals that these factors are familial and are premised on the senior generation's relationships with the NextGen. We consider studying relationships from a business-owning family perspective a novel contribution to family business literature. By utilising the value acquisition model rather than models or theories from business and economics, our study's contribution corresponds with several calls (e.g. Jaskiewicz and Dyer, 2017; Jaskiewicz *et al.*, 2016) to investigate family businesses focusing on the family system rather than the business system. Understanding the business-owning family's role, in nurturing and facilitating learning among the NextGen family members on traditional familial precepts and business operations for cultural and business sustainability, is essential.

Thirdly, our study contributes to the literature on family business TVT by exploring value similarity between the senior generation and the NextGen members from an indigenous African perspective. Previous studies have only examined the transmission mechanisms through which values are transmitted to the NextGen members (e.g. Bika *et al.*, 2019) and value imprinting (Erdogan *et al.*, 2020). These studies have neglected the transmission factors facilitating favourable conditions for successful value imprinting and TVT. TVT is essential for ensuring value similarity, which guarantees, to a large degree, that the legacy of the senior generation is carried forward by the NextGen (Lee *et al.*, 2019) and the continued success of the family and the family business (Ruf *et al.*, 2021).

6.2 Practical implications

The findings of this study have implications for business-owning families and family leaders. Given our findings, the senior generation (parents) should be mindful of how the transmission factors identified can facilitate favourable conditions for effective TVT. For the NextGen members to accept and internalise the values they are taught, the senior generation should adopt authoritarian parenting styles that create an enabling space for the NextGen to be fully exposed to and learn different value sets, which could include personal, family, cultural and business values. Exposing the NextGen to parenting styles that are authoritative and strict, while also nurturing positive emotional interactions between the senior generation and the next will most likely enhance successful TVT. Furthermore, the senior generation should create family spaces with strong family bonds, trust and authenticity, which could lead to the NextGen members freely communicating with and expressing their opinions to senior members.

As demonstrated by the findings of our study, the senior generation members should reinforce autonomy among the NextGen members from a young age. Reinforcing autonomy during their children's development stages helps the senior generation members to nurture authentic behaviours among the NextGen from a young age, resulting in them developing a value set that they will uphold into adulthood. The senior generation members should demonstrate authenticity with respect to their cultural beliefs to the NextGen members by ensuring that their own behaviour is consistently aligned to their values. Moreover, it is incumbent upon senior members to imbue their offspring with the prevailing social norms

within their respective communities. This proactive approach facilitates the seamless assimilation of their progeny into these societal networks. Nonetheless, families at the helm of businesses must remain cognisant of the evolving landscape of societal norms. It is imperative that they consistently evaluate the values that gain ascendancy within their communities and deliberate whether these align with the principles they wish to instil in their children. Similarly, while business-owning families should continually impart a value system that resonates with both the family's ethos and the business's ethos to the next generation, they should also acknowledge the fluidity of time and the dynamism of markets. Consequently, varying generations within the family may adopt distinct sets of values. Therefore, it is of paramount importance for business-owning families to periodically re-evaluate the core values that hold significance for them and their enterprises, adapting as necessary to secure their enduring prosperity.

Our findings could also provide family business practitioners and advisors with greater insights into understanding the role of the senior generation in TVT among indigenous African family businesses. We recommend that these practitioners and advisors highlight the importance of familial relationships in TVT and should encourage family members to build strong interpersonal relationships across generations through family meetings, retreats and activities that foster open communication and trust. Fostering open communication will create a safe space for family members to discuss their aspirations, concerns and expectations and resolve conflicts constructively. We believe that doing this could prevent long-term conflicts and divisions that could threaten the TVT process and inversely impact the success and longevity of family businesses.

6.3 Limitations and avenues for future research

Our study is subject to limitations that open several avenues for future research. Firstly, we focused only on describing how transmission factors facilitate favourable conditions for successful TVT in IBSA business-owning families. While we assert that successful TVT and value similarity are ingredients for harmonious business-owning families and family businesses, our study does not investigate the impact that TVT has on family business' performance in terms of growth, innovation and sustainability. Furthermore, our study focused on certain factors influencing successful TVT between the senior generation and NextGen members. However, the literature identifies other factors that could impact successful TVT such as trust (Kafouros *et al.*, 2022), child perception of the senior generation and family business governance (de Groot *et al.*, 2022). Future studies should consider all factors that could impact successful TVT in business-owning families among NextGen members.

Secondly, it is worth noting that in our study, we treated the senior generation as a unit and did not consider the heterogeneity that could exist in each family nor the different types of senior generation members found in these families, such as parents, grandparents, uncles and aunts. Treating the senior generation as a unit helped us to find a standard unit of analysis. Because of the different family structures and dynamics found in indigenous African families, it was difficult to separate the senior members since they often play a similar role of nurturing the NextGen members (Oppong, 2013; Copen and Silverstein, 2007). Future studies could investigate the different roles played by different types of senior generation members. Another limitation is that although we found that, broadly, value similarity exists between the senior generation and the NextGen members, this similarity was based on the perceptions of participants and not on the comparison of actual value sets. Future studies should attempt to establish whether value similarity exists based on actual value sets identified.

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