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Holding back the years? Tradition and innovation in family wineries

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Abstract: The purpose of this study is to discuss the findings of our research on Hungarian family wineries' economic and non-economic goals in the context of innovation and tradition. The coexistence of the seemingly contradictory principles of tradition and innovation can have a variety of effects on innovation strategies. The loyalty to tradition and the pursuit of innovation can help companies to develop successful products or services but can also hinder the development of an organisation. Our research reveals new findings concerning Hungarian family wineries: innovation, development, and improvement challenges are nearly entirely focused on products, technological processes, and wineries are more aware of environmental stewardship. From an organisational and management point of view, no development or improvement objectives have been identified in the case of the enterprises examined.

Keywords: tradition; innovation; goals of family business wineries

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1. Introduction

In the global economy, family companies play a vital role (Botero et al. 2015). The family, its members, and the business are those dimensions of this sort of enterprise that have separate values, regulations, and are controlled by various interests. The interplay of the many subgroups as well as the family's effect on the business, have several economic and non-economic advantages and disadvantages.

Our study identifies and analyses the economic and non-economic goals of Hungarian family wineries in terms of business and family. After analysing our research findings, the examined Hungarian wineries' goals were defined and classified using the Basco model (2017) framework. Since the interview questions secured a better understanding of our research data they were examined from many perspectives. We were able to get insights into how the seemingly contradictory concepts of innovation and tradition manifested themselves in many fields of the studied firms' operations.

Due to their privileged status of having access to organizational knowledge, family businesses can offer the advantage of successful innovation. Competencies, materials, production procedures, and beliefs can all help businesses generate and/or reinterpret successful products and services.

Traditional values and the quest for innovation are equally critical for family enterprises. Many individuals regard tradition and innovation as opposing concepts (Shoham, 2011). To demonstrate the prevalence of the two opposing features in family businesses, De Massis et.al (2016) examined how family firms might achieve competitive advantage and create a new product innovation method named "innovation through tradition". Although innovation through tradition solely refers to product innovation, this study also sheds light on processes and organizational innovation.

In the first part of our study, theoretical background on the relationship of innovation and tradition as well as the different types of innovation strategies are discussed. After that, the methodology of our research and its analysis are described, and finally the results obtained will be introduced and evaluated.

2. Literature background

2.1. Innovation in family businesses

According to Miller et al., family firms are a “diverse collection of organizations” (Miller et al, 2015., p.20): some encourage innovation and others do the opposite. Long-term thinking companies invest in human and financial resources to encourage innovation. Significant emphasis on socioemotional elements such as altruism or the deployment of financial capital for personal gain might be a barrier to innovation.

The literature on family enterprises examines issues of innovation from a variety of perspectives, such as families’ impacts on resource utilization or innovation strategies over generations and provides a variety of outcomes. While many academics suggest that family firms are more conservative and less innovative than non-family held enterprises (Dunn 1995), Craig and Dibrell (2006) claim that family businesses are more innovative. The main difference between family and non-family enterprises, according to De Massis and his co-authors (De Massis et al. 2013), is in the innovation process. Miller, Wright and Le Breton-Miller (2015) investigated how socio-emotional goals influence the level of innovation.

Intergenerational interaction between family members in family enterprises is founded on trust and power, as well as on the ability to constantly balance control and independence, which can be regarded the “secret” of creativity (Bresciani et al., 2013).

Several authors have emphasized the role of managerial characteristics in understanding the differences in family firm innovation activities. Different managerial qualities, such as personalities, experience, or the leader’s heterogeneity, are among such features (Bresciani et al., 2013). According to the resource-based view, family resources, such as patience capital, can provide the opportunity for more creative long-term strategies, which is a main goal of such businesses (Sirmon and Hitt, 2003). Van Gils et al. (2008) examined the effects of family members’ involvement in governance. Their results suggest that family leadership can reduce agency costs but can also negatively affect organisational innovation.

2.2. Combining innovation and tradition of products and processes

Traditions passed down from generation to generation affect the identity and management of family businesses, encourage continuity, and aid the next generation to succeed (Dacin and Dacin, 2008). Traditions’ common beliefs and practices help family businesses in long-term survival and improve long-term thinking, but those can also be a barrier, particularly when the family is deeply rooted in tradition (Rondi, De Massis and Kotlar, 2019).

According to Jaskiewicz et al. (2015), family enterprises’ intergenerational continuity is dependent on innovation.

Tradition includes inherited know-how, symbolic and cultural contents, and behaviours contributing to the development of both individual and organizational identities (Hibbert & Huxham, 2010). Tradition is viewed as a distinct unique resource that is hard to imitate due to its embedded status in the resource-based approach (Barney, 1991). Tradition is concerned with the past and stability, whereas innovation is concerned with change. Both attributes are critical in family businesses. Strict adherence to tradition can result in loss of competitiveness, whilst focusing solely on innovation could destroy the company’s essential distinct defining characteristics (Erdogan et al., 2019).

According to Erdogan et al.’s research (2019), family businesses sustain traditions in two ways. When a family takes a preservationist approach, they remain committed to the founder’s values, beliefs, and craftsmanship. The revival approach, on the other hand, refers to firms that revive some forgotten components of family traditions. There are two types of innovation methodologies: the first is a segregation approach, which separates the iconic products and traditional processes from new ones. Firms that simply reinterpret the essence of their traditional products adopt integrative innovation. The four approaches combine to provide four ways that can integrate innovation and tradition: preserving tradition, maintaining essence, restoring legacy, and embracing nostalgia.

In the wine business, combining tradition with innovation serves a dual purpose. On the one hand, it thrives to meet customer needs at a higher level; on the other hand, it also raises consumer awareness of the origin of the product. In the first case, process innovation primarily refers to changes in product processes (product portfolio, continuous quality improvement), manufacturing processes (aiming to produce increasingly high-quality products while combining tradition and innovation), packaging, and commercial processes (optimisation of promotion and distribution) (Vrontis, 2016). Activities that combine innovation and tradition can assist in manufacturing high-quality goods.

Even as part of an intergenerational approach, emphasizing the link between the family's reputation as well as its cultural and regional identity can play a significant role in family wine enterprises. These features can improve with long-term credibility and brand recognition. Furthermore, studies emphasize the importance of the wine's place of origin (Vrontis, 2016), as brand is becoming increasingly essential these days. Quality wine can be made by combining innovation with traditional values.

De Massis et al. (2016) investigated how family businesses use their traditions to gain a competitive edge in product innovation. De Massis et al. (2016) distinguishes between the source and the type of innovation when describing innovation through tradition (See Figure 1). Two types of innovation can be distinguished: the first is about inventing product features, while the second is about innovation on the meaning of the product. The sources could be linked to the company or region concerned.

Source Past Knowledge	**Types of Product Innovation**	
	Innovating Product Functionalities	**Innovating Product Meanings**
Firm Tradition	Interiorising knowledge from the firm's past (**raw materials and manufacturing processes**) and reinterpreting these to enable new product functionalities.	Interiorising knowledge from the firm's past (**basic assumptions and beliefs**) and reinterpreting these to enable new product meanings.
Territorial Tradition	Interiorising knowledge from the territory's past (**raw materials and manufacturing processes**) and reinterpreting these to enable new product functionalities.	Interiorising knowledge from the territory's past (**basic assumptions and beliefs**) and reinterpreting these to enable new product meanings.

Figure 1. Types of innovation strategies through tradition, based on the source of knowledge and the type of product innovation. *Source: De Massis, 2016 (p. 53)*

The starting point of interiorising product innovation through tradition, according to De Massis et al. (2016), could be linked to the business or the territory. Interiorising knowledge regarding materials and manufacturing processes gives new meaning to innovating product functionalities, while reinterpreting beliefs and convictions to products brings new meanings to innovating product functionalities (see Figure 2).

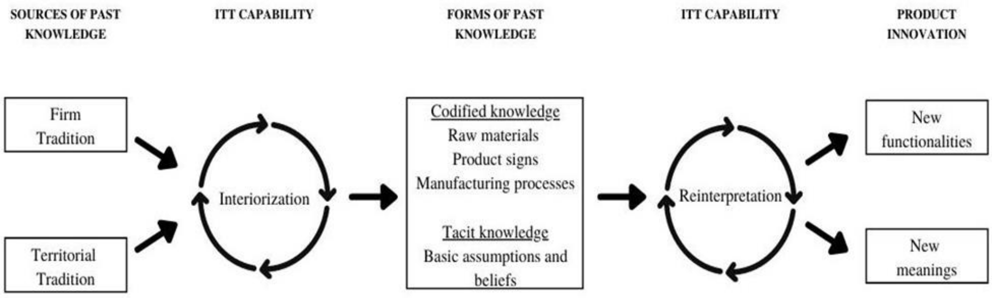

Figure 2. The model of innovation through tradition. *Source: De Massis, 2016 (p. 57)*

2.3. Organisational innovation in family businesses

The term "organizational innovation" refers to the renewal of a company's daily activities and organizational procedures. "Organizational innovations are not only the outcomes and preconditions of technological innovations; they can also induce significant improvements in business performance on their own in terms of improving work quality and flexibility, information flow within and between businesses, and participants' ability to learn and apply knowledge, which is a critical factor in implementing new technologies" (Csizmadia, 2015. p. 17).

The purpose of starting an "evergreen" organization is to create a long-term business that requires the following investments from the enterprise: talented employees, social and financial capital, connections with external stakeholders, and effective control mechanisms (Miller et al. 2015).

Inside the organization, innovation can be structural and related to procedures. When structural changes are made, the organizational structure is modified, which can affect specific roles or tasks. Process innovation changes fundamental principles of operations.

Operational procedures and the use of capabilities are also influenced by the structure and design of decision-making within the organization (Bingham & Eisenhardt 2011). Firms may adopt more flexible structures and rules when combining improvisation and rules (Davis 2009), while rigid rules determine operating procedures.

The ideal organizational structure was the focus of Davis' (2009) research. Less organized businesses do not give directions to establish the corporate mindset, whereas extremely structured organizations, in his opinion, are rigid, as opposed to less organized businesses. This conflict creates a dilemma because efficiency and adaptability are required for successful performance in a dynamic setting. In a dynamic context, his findings reveal that flexibility and efficiency have a trade-off connection. Although the lack of fixed structure allows for adaptable solutions, frequent improvisation can lead to incoherence and chaos. While a more complicated organizational structure supports efficient execution, overstructured organizations stagnate, thereby making it impossible to adapt to new opportunities. Flexibility refers to seizing unexpected opportunities, whereas efficiency refers to the implementation of those opportunities.

The successful application of organizational abilities (competences, knowledge, and routines) that focus on the division of labour and task organization is essential for family enterprises. "When solving a given organizational problem, it is a set of often repetitive and more or less automated actions and rules that define the range of possible responses to the problem ('what can be done'), the means of solving the problem ('how to do it'), the method of determining the appropriate actions to be taken in such a case ('who decides what and how to do it'), and often also what the organization perceives and identifies as a problem" (Csizmadia, 2015). However, in addition to enabling faster and more effective decision-making, these systematic problem-solving processes can also lead to the rigidity of organizational relationships.

3. Methods

The Budapest LAB definition (Kása, Radácsi, & Csákné, 2019) was used as a sampling criterion for family businesses. Enterprises are defined as family businesses if they:

1. identify themselves as family businesses, or
2. have at least fifty percent of the company owned by one family, and
3. the family is involved in the management of the business, or
4. family members participate as employees in the operations of the business, or
5. management and ownership transfer are carried out partly or entirely within the family.

Twenty-one semi-structured interviews were conducted with Hungarian wineries. Selecting interviewees took place with the help of snowball sampling: some family wineries were selected through our direct or indirect network while the others were invited to our sample based on recommendations. We looked for enterprises that identified themselves as family businesses. Neither the company size, nor the number of generations working at the company was limited. According to our original plans, interviews were to be conducted in person. However, out of the twenty-one interviews, only the first six were carried out personally due to the pandemic, the remaining interviews were conducted online.

It was discovered that a business's turnover cannot be used to estimate its size because a considerable number of family wineries are made up of multiple different businesses operating simultaneously, which constitute a group of enterprises. As a result, we have concluded that the size of the cultivated area (in hectares) as a demographic characteristic of the firm is a stronger indicator of its size. The areas managed by the enterprises ranged from 2.5 to 110 hectares.

In ten Hungarian wine areas, first, second, and third generation family members were interviewed. We had the opportunity to speak with both male and female winemakers. All the wineries had their founders actively involved in the management of the business, and it was usual for a family member to be in charge of winemaking.

The Nvivo12 software was used for data structuring, data coding and text analysis. As a first step we used the codes found in the literature (Basco model) as primary codes. After this, another round of coding followed, where themes (product, process, and organisation) were added to innovation (see Figure 3).

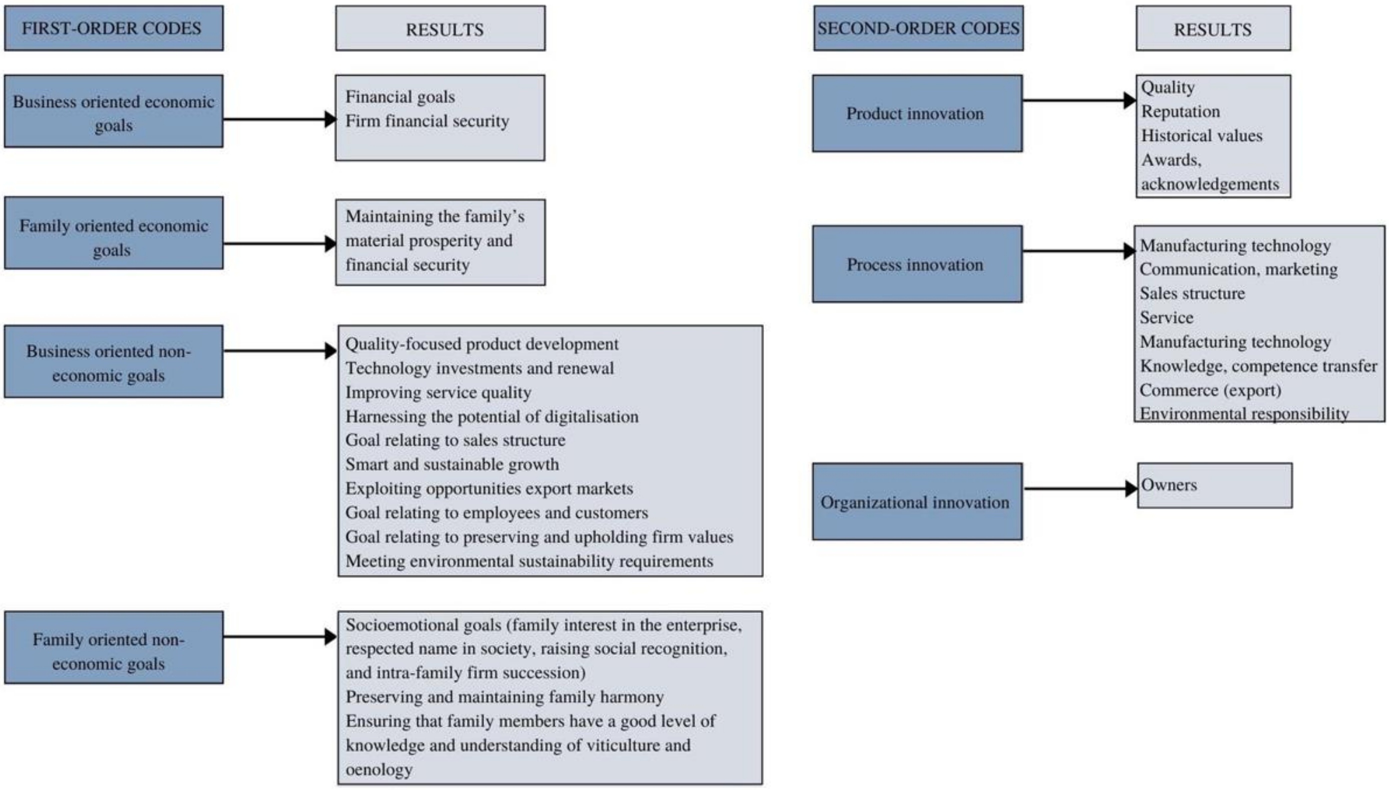

Figure 3. Coding structure. *Source: own work*

4. Results

The first research question was to identify the goals using the Basco (2017) model's structure. The table below summarizes the differences between economic and non-economic goals, as well as business and family-oriented goals (see Table 1).

In our analysis concerning innovation through tradition, three groups could be distinguished: innovation connected to products, to processes, and to the organisation (see Table 2).

(1) Product innovation and process innovation

Families have extensive knowledge of their products and markets, which plays a vital role in product innovation. The source of knowledge necessary for product innovation is not only linked to the family, but it may serve as a basis for a territorial level tradition. Thus, tacit and explicit knowledge is crucial in the case of wineries.

Quality has become associated with market survival and competitiveness in the case of small wineries. *"It all relies on the grape when it comes to wine. Then there's product development, which includes packaging, corking, labelling, and communication."* (B17)

The core activities related to wine production are based on family knowledge and tradition, which help to strengthen the sense of uniqueness and identity.

Because the product frequently bears the family name, the reputation of the family is also quite important. *"I want it to be damn good because we've put our name on it."* (B5).

In the case of regional brands, the combination of innovation with tradition has a positive impact on customer perception. Stories about family traditions are key sources of family traditions used in marketing activities, even though most firms have only been around for a few decades or even for shorter periods.

Table 1. Economic and non-economic goals. *Source: Own editing*

	Business-oriented	Family-oriented
Economic goals	Financial goals Business' financial stability	Preserving the family's financial well-being and financial stability
Non-economic goals	Quality focused product development Technology development, renewal Improving service quality Exploiting opportunities in digitalisation Goals related to sales structure Intelligent and sustainable growth. Exploiting export market opportunities Goals related to employees and consumers Goals to preserve and maintain business traditions Implication of environmental sustainability aspects	Socio-emotional goals (goals of maintaining family interest, increasing family fame and social recognition, generation change) Preserving and maintaining family harmony Family members' special oenology training, education

The paradox of tradition and innovation is strongly reflected in product innovation. Our analysis demonstrates that the approaches described by Erdogan et al. (2019) can easily be identified. Some wineries, usually those where the founder is active, insist on producing certain types of wine. In many cases, the second generation has created their own wine, usually under a different brand, separating the iconic types from the new ones. As a result of these changes, different types of production processes and product portfolios emerge.

Table 2. Areas of innovation through tradition. *Source: Own editing*

	Tradition of the territory	Tradition of the business
Product innovation	Quality Reputation Historical values	Quality Reputation Historical values Awards, acknowledgements
Process innovation		Manufacturing technology (old technologies combined with new technologies make manufacturing more efficient) Communication, marketing Service Knowledge, competence transfer Commerce (sales structure, export) Environmental sustainability (e.g., organic farming)
Organisational innovation		Change of owners

Families need to make a series of decisions regarding the use of tradition to achieve both economic and non-economic goals.

When it comes to process innovations, there are two types to consider. The first is related to manufacturing, and the outcomes are comparable to those of product innovation. When it comes to manufacturing processes, efficiency is crucial, especially when quantity is a concern. Mechanisation is one of the available strategies to achieve efficiency for many wineries: *"Mechanisation is the way of the future, and the human aspect must be minimized... winemaking technology must be simplified, efficient, and of greater quality.' This may be an increase in cooling capacity... and within the winery, it's critical to improve bottling so that as* *minimal dissolved oxygen as possible enters the bottle during bottling, which will also help us keep the quality of our bottles for longer in the case of reductive batches."* (B10)

In numerous vineyards, a considerable effort has been made to adopt more and more environmentally friendly techniques while preserving conventional technologies.

Other processes include R&D, marketing, distribution, information transfer, and the use of increasingly environmentally friendly production processes. These processes are managed by family members, which can build on the family's traditions, knowledge, and abilities.

The activities of research and development are based on a combination of new and traditional knowledge and values. Both distribution networks and the traditional personal distribution channel based on family relations – primarily the founder – are used in distribution procedures.

In the case of regional brands, the combination of innovation with tradition has a favourable impact on customer perception. Though most businesses have a long history, stories about the grandfather and family traditions are essential sources of family traditions that are employed in marketing.

(2) Organisational innovation

Of the wineries studied, no innovation was found in terms of organizational structure or process development. The use of an organizational model, which was founded on the company's traditions and customs, was quite typical.

The family's control is one of the most fundamental characteristics that distinguishes family businesses from non-family enterprises. All the businesses investigated seemed to have the goal of maintaining family control.

The potential of employing an external manager was mentioned, but not as a viable option. An attempt was made at one company to hire a non-family member manager, but this, too, failed after a short period of time. *"We recently hired a colleague to take over the operational management responsibilities, and we failed in less than three months."* (B5)

The founder or another family member – and rarely all family members – is in charge of running the family firm. Most families believe that a non-family member manager does not always follow the family's economic and non-economic goals. *"We had a contract with a freelance operative manager... We do not, in my opinion, see things in the same manner. In terms of management, if you are aware of problems and their sources, you will find a solution sooner or later; however, if someone is unable or unwilling to understand, they will not see the nature of the problems, and thus the efforts to solve them will be unsuccessful."* (B5).

Conflicts arose in certain businesses because of generational shifts, as described by Bammens (2008). At the same time, our respondents did not mention any issues arising from task-related conflicts. The inability of an organization to renew itself may have long-term negative implications, such as the fragmentation or closure of the business.

5. Discussion and conclusions

Our results indicate that there are numerous approaches to integrate innovation into an organisation's operations. In the case of wineries, product and manufacturing innovation is primarily concerned with grape cultivation and wine production.

Several authors have discovered that tradition can be viewed as a source of innovation (Presenza et al., 2019), because understanding traditional values can contribute to the development of new products or services. According to that tradition, when combined with new technology, successful innovation can be achieved.

According to our findings, vineyards employ a variety of innovative strategies based on their familial background and knowledge. Those that use the preservation strategy accomplish two things: they design completely new goods while retaining their traditions through their iconic wines, and in many cases 2nd or 3rd generation family members develop their own brands.

Embracing nostalgia is most visible in the context of processes that revive messages related to the characteristics of particular wine regions. Because the family wineries examined are not old enough, even in the cases of three-generation enterprises, the approaches of maintaining essence and restoring legacy are not yet present.

The investigated organizations also had innovation activities related to service development, commerce, knowledge transfer, and environmental sustainability. In most cases, families manage research and development processes without the help of external specialists.

Living traditions and family values can be used to develop new products and processes. Although it is critical, these unique assets will take time to develop into true long-term assets. Future generations are increasingly concerned how they can attain their goals using traditional resources.

Generally, the founder or a manager runs the family firm, but the entire family rarely participate in decision-making, especially when it comes to innovation.

Our results also reveal that family and business wealth are totally intertwined, which implies that decisions are not just focused on financial objectives. Independent managers, according to Miller (2006), can help to preserve expertise and objectivity, can provide alternative perspectives, and will pay attention to key facts that the family would otherwise ignore. Apart from that, they can represent objective points of view, which can help in searching for and selecting competent leaders, and in facilitating resource sharing, but can also result in family members losing corporate property (Miller, 2006).

Wineries do not consider organizational innovation in addition to the previously mentioned product and process innovation. These companies are also known for making little or no effort to develop a new organizational or business model at the corporate governance and strategic levels, even though this may be required for development and growth, whether it is international market entry, portfolio expansion, or the multi-family model, which inevitably emerges with generational change. Organizational innovation can help improve family communication thereby causing family harmony, which is essential in these businesses, and improves business coordination efficiency.

In the case of the wineries examined, bringing in investors or involving management experts does not appear as an option. Even so, it is vital to take steps toward organizational development because, without it, firms may face challenges in the future when considering their growth requirements.

According to Davis' (2009) research, maintaining the optimal balance of efficiency and flexibility is critical in small family firms. It is important to establish a suitable structure and implement organizational innovation since only in this way will organizations be able to take risks and operate well in today's dynamic and challenging environment.

Our research has shown that the family's effect on creativity and tradition can have a significant impact on goals. While tradition can be a source of innovation in the case of product and process innovation, it can also be a barrier to further development in the case of organizational innovation. To fulfil their business and non-economic objectives, family wineries must innovate in all areas while maintaining their heritage.

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