

Antecedents of coopetition in small and medium-sized hospitality firms

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Abstract

Coopetition, which is entering cooperation with competitors, lets firms overcome the challenges of uncertain environments and their intense competition and pressure to innovate. The hospitality industry frequently experiences this kind of competition. It is also dominated by family-run small and medium-sized enterprises (SMEs), which are inclined towards cooperation due to their limited size and resources, along with their strong social ties. Investigating hospitality SMEs' decision-making, this mixed-method study tests the antecedents of coopetition in 171 hospitality SMEs in western Austria. Its findings show that economic benefits and destination networks directly and positively influence coopetition, while family involvement indirectly and positively moderates the effect of environmental conditions and social relationships on coopetition. Information from follow-up interviews with 15 firm managers complements the understanding of these effects. Our findings encourage destinations to establish services helping family firms to coopete.

Keywords:

Tourism; Coopetition; Destination development; Network; Family involvement

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1 Introduction

Cooperative relationships with other organizations have become an important strategic approach for firms when seeking to overcome challenges such as a turbulent environment or limited resources (Gnyawali & Park, 2009; Power, Di Domenico, & Miller, 2019). Interdependence between hotels, geographical proximity, and a common goal of attracting visitors to a destination are common enablers of cooperation between competitors among hospitality firms, especially for those of small size (Chim-Miki & Batista-Canino, 2017b; Della Corte & Sciarelli, 2012; Kylänen & Rusko, 2011).

Small firms are defined differently by region; they account for a large share of most economies. In 2018, following the EUROSTAT definition of less than 250 employees, SMEs accounted for 80% of employment in the European accommodation and food service industry (EUROSTAT, 2020). This number was 60% for the United States, which defines small businesses as those having up to 500 employees (Small Business Administration, 2020). Hence, hospitality is characterized by SMEs, but additionally also by family firms accounting for more than 90% of hospitality and tourism SMEs in Europe (Peters & Buhalis, 2013).

In spite of this, for years hospitality research never distinguished between family and non-family firms when studying SMEs to understand issues such as their motives to open a business (Ateljevic & Doorne, 2000). More recent research has increasingly investigated the nuances of hospitality and tourism family firms regarding for example their entrepreneurial behavior (Kallmuenzer & Peters, 2018b; Peters & Kallmuenzer, 2018). However, there is still limited research on the coopetitive behavior of family firms in hospitality and its related industries (Bouncken, Gast, Kraus, & Bogers, 2015; Chim-Miki & Batista-Canino, 2017a).

Getz and Carlsen (2005) argue the necessity of investigating the nature of hospitality family businesses and their social nature. Management research has started to identify the

antecedents of coopetition (Bengtsson & Raza-Ullah, 2016; Dorn, Schweiger, & Albers, 2016) and develop the idea of strategic rationale and coopetition mindset as latent antecedents; however, a systematic investigation of hospitality and tourism within their unique context is still missing (Czakon, Klimas, & Mariani, 2020).

Family firms are characterized by ownership centralization and family involvement in managerial positions (Chrisman, Chua, Pearson, & Barnett, 2012; Kallmuenzer, Kraus, Peters, Steiner, & Cheng, 2019). Their decisions are influenced by family-related and often socio-emotional wealth (SEW) goals such as the family's long-term orientation and embeddedness in their community (Classen, van Gils, Bammens, & Carree, 2012; Peters & Kallmuenzer, 2018). With this in mind, it can be expected that family involvement impacts coopetition decisions (Gast, Kallmünzer, Kraus, Gundolf, & Arnold, 2019) that are commonly driven by game-theoretic behavior, making firms switch between cooperative and competitive behavior depending on the respective situation (Padula & Dagnino, 2007).

The purpose of this mixed-method study that interprets survey findings with the help of follow-up interviews is to close the research gap on antecedents of coopetition among hospitality SMEs. Special attention is paid to identifying and understanding the differences between family and non-family firms in more detail, with a specific focus on the reasons hospitality family firms engage in coopetition that is affected by both game theory thinking and family firms' SEW orientation (Gómez-Mejía, Haynes, Núñez-Nickel, Jacobson, & Moyano-Fuentes, 2007). This study contributes to research on family SMEs in hospitality and coopetition research at large by specifying the antecedents of coopetition in hospitality SMEs, and in particular for firms with high degrees of family involvement.

2 Theoretical background

2.1 Coopetition and game theory

Economic actors are capable of simultaneously maintaining cooperative and competitive relationships. Here, cooperation and competition are not regarded as mutually exclusive, but as complementary instead (Bengtsson & Raza-Ullah, 2016). Bouncken et al. (2015) defined coopetition as “a strategic and dynamic process in which economic actors jointly create value through cooperative interaction, while they simultaneously compete to capture part of that value” (p. 591). The value creation intent of coopetition has been further emphasized by Gnyawali and Charleton (2018), who state that “coopetition refers to simultaneous competition and cooperation among firms with value creation intent” (p. 2513). The tensions arising within and between individuals, teams, and organizations due to the simultaneous occurrence or concurrent presence of competition and cooperation have been identified by Czakon, Srivastava, et al. (2020).

Firms enter coopetitive relationships as a result of various environmental settings. Institutional pressure in the external environment often requires firms to keep in line with industry standards, customer demand, or technological requirements (Bengtsson & Raza-Ullah, 2016). On the other hand, entering a coopetition relationship is a strategic rationale that, assuming proper strategic fit, can enable firms to meet goals and achieve perceived benefits such as competitive advantage, increased efficiency, and access to resources (Czakon & Czernek, 2016; Czakon, Klimas, et al., 2020). Finally, relation-specific drivers explain which partners are chosen for which purposes, and how the relationship is managed and developed (Bengtsson & Raza-Ullah, 2016; Czakon, Klimas, et al., 2020). A competitive mindset in the form of cooperative orientation, trust in partners, and past experience in coopetition is helpful when entering coopetitive relationships (Czakon, Klimas, et al., 2020). Dorn et al. (2016) further argue that trust and personal relationships between parties affect dyadic relationships,

while the position of participants in their respective networks affects dyadic relationships of all parties engaged in coopetition.

An investigation of coopetition is helpful from a game theory perspective because it allows an alternation between the competitive or cooperative perspectives, which both exist in a coopetitive relationship (Padula & Dagnino, 2007). Furthermore, the interaction of and the tension between the benefits and challenges stemming from coopetition rely on the decisions of the focal actor, along with the decisions and behavior of others. Coopetition can thus lead to a common benefit without assuring its fair distribution, making it difficult to implement as a result. Indeed, it is a multifaceted business strategy that challenges firms to cooperate while at the same time not neglecting their own welfare. Consequently, despite the beneficial effects and opportunities of coopetition forecasted by game theory, coopetition is linked to risks such as giving away too much knowledge or creating tension between coopetition partners (Bouncken & Kraus, 2013; Gast et al., 2019).

2.2 Cooperation and competition among hospitality firms

Destinations are perceived by travelers as a single unit, meaning that hotels, attractions, and service providers need to collectively develop their respective destination to boost its appeal (Chim-Miki & Batista-Canino, 2017b). Travelers tie together destination firms and create tourist-activated networks (Zach & Gretzel, 2011). These networks basically require hospitality firms to cooperate within them, as they provide a variety of complementary, in-demand tourism products and services (Friedrichs Grängsjö, 2003). Done well, they can even increase a destination's total number of overnight stays (Falk, 2017). Hotels and other destination businesses leverage this forced cooperation to collaboratively innovate while competing with other destinations (Hjalager, 2010; Zach & Hill, 2017). However, these common goals and shared geographical location (i.e. access to the same resources) also mean that hotels and related firms offer similar products and services that compete with each other (Della Corte & Sciarelli, 2012).

Because hotels and other destination businesses are dependent on each other, they often have to accept compromises in their cooperative decisions (Chim-Miki & Batista-Canino, 2017b; Della Corte & Aria, 2016). And hospitality firms do in fact compete with each other to attract visitors to their own locations, for example by creating/achieving a distinctive position in the marketplace (Wang & Krakover, 2008). Coopetition for hospitality firms is not necessarily limited to a single destination; it can also influence multinational firms as they interact with the governments of the countries in which they operate (Luo, 2004).

2.3 Small and medium-sized enterprises and coopetition

SMEs engage in cooperation to improve economies of scale and scope (Gnyawali & Park, 2009), pool resources, and share research and development. SMEs often have limited cash reserves and restricted debt capacity, making investments in product and service developments difficult (Morris, Koçak, & Özer, 2007). Furthermore, SMEs often have only small market shares, meaning they only rarely influence prices, if at all (Levy, Loebbecke, & Powell, 2003; Morris et al., 2007). By engaging in cooperative behavior, SMEs can strengthen their position in the market to gain more market power and enhance their competitiveness against large enterprises (Gnyawali & Park, 2009). They are able to capture firm-level value through coopetition experiences and explicit coopetition strategies (Bouncken, Fredrich, & Kraus, 2020). Although SMEs are also more vulnerable to environmental impacts due to their size and market position (Hock-Doeppen, Clauss, Kraus, & Cheng, 2020), this risk can be mitigated through coopetition, as SMEs access more resources and spread risk in an effort to achieve firm survival (Akdoğan & Cingöz, 2012).

2.4 Family businesses and coopetition

The European Commission defines family firms as those having the majority (>50%) of decision-making rights in the hands of one family, and that have at least one family member playing an active role in the firm's governance (European Commission, 2009). In addition to making decisions according to firm goals, family firms also pursue non-financial and family-

related goals, commonly referred to as socio-emotional wealth (e.g., Mensching, Kraus, & Bouncken, 2014). These include passing on the firm to the next generation, or building business relations that have strong social ties (Berrone, Cruz, & Gómez-Mejía, 2012). This difference rests foremost with the decision-maker who determines the operational activities, and often the strategic direction of a firm. Classen et al. (2012) found that the decision-makers' behavior and preferences determine strategic decisions for a company.

In family firms, these strategic decision-makers are usually family members who are emotionally bound to the company, which can lead to situations where family goals are prioritized over strategic firm goals (Cesinger et al., 2016). Social ties within the family and beyond are often more important than financial benefits (Berrone, Cruz, & Gomez-Mejia, 2012), meaning family firms pursue the development and maintenance of long-term strategies and perspectives, such as sustainable investments and growth (Kallmuenzer & Peters, 2018b) or collaboration (Gast et al., 2019). Therefore, family involvement can influence a firm's decision to engage in cooperative behavior.

2.5 Hypotheses and conceptual model

Management and hospitality literature considers several antecedents of firms engaging in coopetition. This section develops hypotheses to identify the coopetition antecedents relevant to hospitality SMEs. An important note here is that, from a conceptual point of view, and for coopetition in hospitality, the firm/industry level view by Gnyawali and Park (2009) is extended to include the hospitality-specific context. Coopetition in hospitality is also fostered through the often close social ties (Czernek-Marszałek, 2020) and interdependence of firms and their tourism destinations (Strobl & Kronenberg, 2016) as they pursue their mutual benefits.

Hospitality firms, especially hotels, are largely impacted by external contingencies such as environmental challenges (Gnyawali & Park, 2009) and competition within and beyond their destination. Bound to one location, hotels directly compete with others providing similar products or services in the same market (Della Corte & Sciarelli, 2012; van der Zee & Vanneste,

2015). These competitive forces pressure hospitality firms to engage in cooperation with competitors to improve their competitiveness (Friedrichs Grängsjö, 2003), achieved for example through collaborative innovation (Zach & Hill, 2017).

Furthermore, hospitality SMEs often lack the resources they need to shield themselves from unwanted challenges; they can often look beyond their immediate destination market to better understand global developments (Hwang & Lockwood, 2006). With this in mind, they have a need to assess and reduce risks stemming from the unpredictability and uncertainty in their economic environment (González, 2006; Padula & Dagnino, 2007). Curbing uncertainty can be achieved through knowledge and resources gained through coopetition.

H1: Uncertain and competitive environmental conditions positively affect the coopetition propensity of hospitality SMEs.

There are several advantages a firm can gain from both competition and cooperation. Whereas competitive relationships are focused on the individual or private benefits of a focal entity, cooperative relationships additionally create mutual or common benefits for all parties involved (Morris et al., 2007), including the benefits perceived by the partner as collective (Czakon & Czernek, 2016). Coopetitive relationships as a result include private and mutual benefits. For small hospitality firms, Wang and Krakover (2008) found that decision-makers engage in either cooperation or competition with others after considering the potential economic benefits for the firm (competition) or the destination (cooperation). Hence, if economic benefits can be generated for both the firm and the destination, then engaging in coopetition should be a suitable path forward (Friedrichs Grängsjö, 2003). Finally, collaboration with others in the same destination network can create economic benefits for them as well (Zach & Racherla, 2011). We therefore argue that hospitality SMEs engage in coopetition when they perceive an economic benefit for their business (such as improved competencies and products/services, a stronger market position, and organizational effectiveness), as well as for the involved partner/competitor and the destination (such as mutual competitive advantage, cost

effectiveness, greater efficiency, and a stronger market position) (Kim, Kim, Pae, & Yip, 2013; Rai, 2016).

H2: The perceived economic benefits of coopetition positively affect the coopetition propensity of hospitality SMEs.

Entering coopetitive relationships depends on the social connection of the parties involved (Morris et al., 2007). This is influenced by social interaction (Chiu, Hsu, & Wang, 2006) such as frequency and length of communication, and trust between parties (Yilmaz & Kabadayi, 2006) fostered or hindered by prior coopetition experience (Bouncken et al., 2020). The network of destination firms provides these kinds of opportunities for a meaningful communication exchange (Baggio & Cooper, 2010), and is usually based on established personal relationships (Kylänen & Rusko, 2011; Teixeira, Andreassi, Köseoglu, & Okumus, 2019) and social embeddedness (Czernek-Marszałek, 2020, 2021). Furthermore, relational trust gained from prior shared coopetition experience facilitates the sharing of resources and the evaluation of knowledge among destination businesses (Friedrichs Grängsjö & Gummesson, 2006), and to some extent the selection of innovation partners (Zach & Hill, 2017).

Czakon and Czernek (2016) propose that decision-makers rationally assess partner aspects such as reputation, capabilities, and legitimacy. In addition, positive learning and a trustworthy relationship provide favorable conditions for coopetition (Morris et al., 2007). Mutual agreements are more reliable because their perceived risk is lower (Yilmaz & Kabadayi, 2006). Hence, strong social relationships through established and often family-related ties (Strobl & Kronenberg, 2016) reduce uncertainties and vulnerability, making coopetitive behavior more likely.

H3: Established social relationships positively affect the coopetition propensity of hospitality SMEs.

Hospitality and other destination firms individually, or collectively as members of the destination network, deliver the travel experience (Baggio & Cooper, 2010). These firms offer

visitors and themselves a collective benefit that is greater than the sum of all products offered independently (Della Corte & Sciarelli, 2012). They often not only feel dependent on the destination network, but downright committed to it (Wang & Krakover, 2008). In this kind of situation, firms want to be optimally integrated while simultaneously pursuing their individual and mutual goals (Chin, Chan, & Lam, 2008). As a result, firm willingness to share information and adapt to the necessary requirements is higher than without commitment to dyadic cooperation with partners and the destination. Friedrichs Grängsjö and Gummesson (2006) found this to be applicable to hospitality SMEs. The joint value creation efforts of hospitality and other firms also include a greater commitment to cooperate with competitors within their destination market.

H4: Commitment to the destination network positively affects the coopetition propensity of hospitality SMEs.

Despite suggestions that consider family involvement a potential moderator of the coopetition propensity of family SMEs (Gast, Filser, Gundolf, & Kraus, 2015), it is surprising that the nuances of family firms have often been neglected in coopetition research. Family SMEs differ from their non-family counterparts in family-related corporate SEW goals, and situation-specific risk-taking behavior (Classen et al., 2012) originating from their family- and long-term-oriented positions (Gómez-Mejía et al., 2007). On the one hand, this long-term orientation will cause firms with high family involvement to engage in coopetition to enjoy economic benefits, assuring the survival of the firm in the long run (Gast et al., 2019). Indeed, as a recent meta-analysis shows, family firms are able to outperform their non-family counterparts (Wagner, Block, Miller, Schwens, & Xi, 2015).

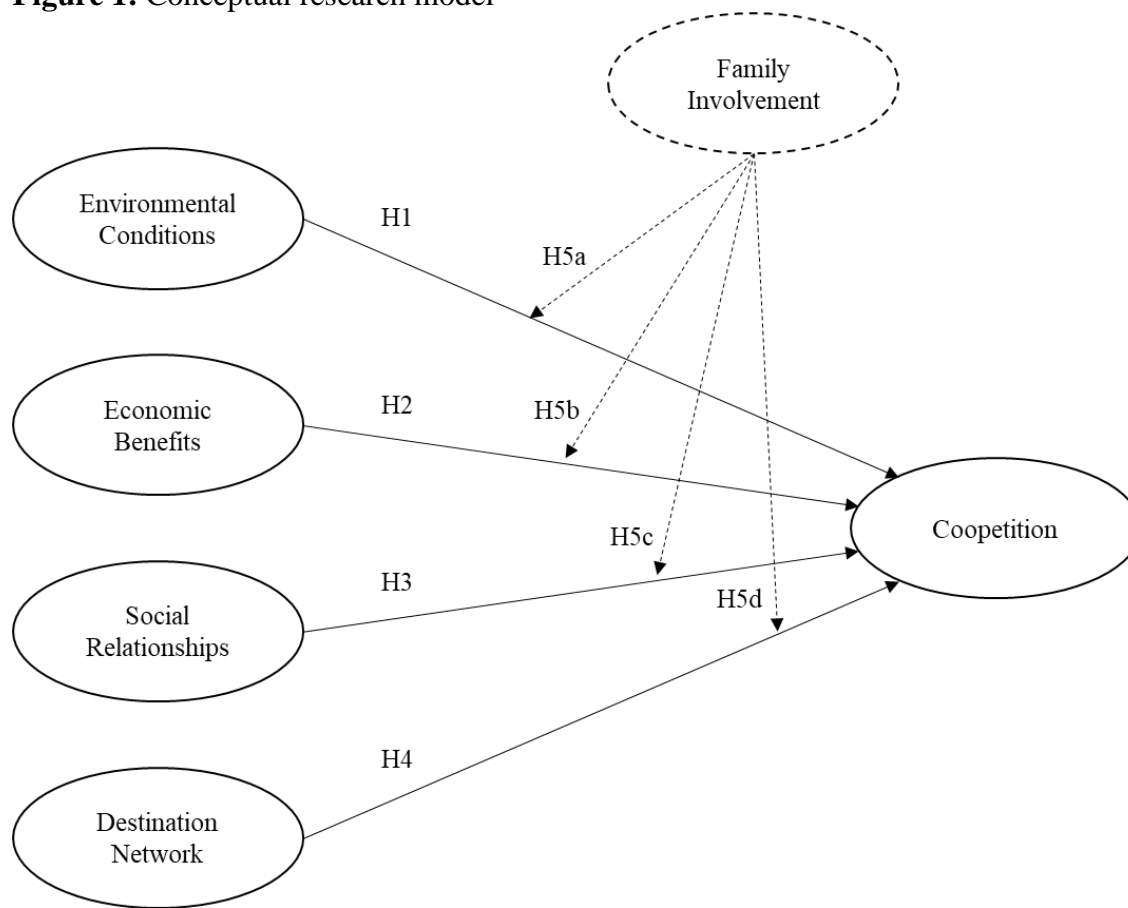
On the other hand, however, and due to their often stand-alone and family-focused position, family firms also tend to be more vulnerable to environmental changes. As shown by the related research on family businesses (Gómez-Mejía et al., 2007) and tourism (Kallmuenzer & Peters, 2018a), family SMEs avoid risk-taking behavior that would often be necessary,

particularly in uncertain times. It can thus be hypothesized that in times of uncertain and competitive environmental conditions, firms with high family involvement will more likely engage in coopetition.

Furthermore, family SMEs strive for long-term relationships that have strong social ties (Berrone et al., 2012). As family firms seek and maintain these long-term relationships (Feranita, Kotlar, & De Massis, 2017), they are often also perceived as more trustworthy than non-family firms (Eddleston, Chrisman, Steier, & Chua, 2010). Consequently, it can be argued that family-run hospitality SMEs, i.e., firms with a high degree of family involvement, maintain stronger social relationships than non-family firms, and are thus more likely to engage in coopetition with their socially related/similar firms. This is particularly the case for hospitality firms competing within the same destination market (Friedrichs Grängsjö & Gummesson, 2006). Hence, the social ties of family-run hospitality SMEs are mainly developed within their destination network, as family firm entrepreneurs develop and nurture their network relationships and are deeply embedded in the local community (Peters & Kallmuenzer, 2018; Shaw, 2008).

H5: Family involvement moderates the effect of the antecedents of coopetition of hospitality SMEs. Family involvement positively moderates the effects of a) environmental conditions, b) economic benefits, c) social relationships, and d) the destination network on the coopetition propensity of hospitality SMEs.

Figure 1: Conceptual research model



3 Methodology

3.1 Data collection

This study employs a quantitative survey analysis that tests the research model (see Figure 1) as well as qualitative follow-up interviews aiming to capture the perceptions of those involved in greater detail (Czakon & Czernek-Marszałek, 2020). The survey data was collected via an online questionnaire distributed in western Austria. This region was chosen as the study context because it is an established tourism region dominated by family-run hospitality SMEs (Peters & Kallmuenzer, 2018; WKO, 2019).

The questionnaire for this study was developed from scales previously mostly applied in a non-tourism context. These were translated into German and back-translated into English (Brislin, 1980). To further reduce measurement errors and comprehension issues, the questionnaire was tested and adapted together with two hotel managers who also serve in

leading positions in tourism associations, and were thus considered industry experts. The data was collected in February and March of 2019. Local destination marketing offices in western Austria assisted in distributing survey invitation emails to the managers of 3,828 hospitality SMEs. Each company received an initial email, followed by a reminder email two weeks later. This effort resulted in 171 fully completed questionnaires that were used for the data analysis. The firms in the data were on average 41 years old, whereby most were micro-enterprises with one to nine employees, common for this and many other tourism regions (WKO, 2019). The firms had near-equal gender distribution of their business managers, and many were each more than 50% family-owned, with a total of 91.23% of firms in the sample being family firms.

Table 1: Questionnaire descriptive statistics

	Age	Number of employees
Firm characteristics		
Mean	41.33	11.13
Standard deviation	29.51	21.64
Maximum (Minimum)	239 (1)	170 (1)
	Absolute	Percent
SME classification		
<i>Micro enterprises (1 to 9 employees)</i>	129	75.44%
<i>Small enterprises (10 to 49 employees)</i>	35	20.47%
<i>Medium-sized enterprises (50 to 249 employees)</i>	7	4.09%
Gender of business manager		
<i>Male</i>	83	48.50%
<i>Female</i>	88	51.50%
Stake of family ownership		
<i>0-50%</i>	15	8.77%
<i>51-100%</i>	156	91.23%

To allow a more detailed interpretation of results, the survey respondents were invited to a qualitative follow-up interview to provide additional information to their responses. On-site expert interviews were conducted with 15 survey participants at their business locations from May until July 2019. Data saturation was reached following these 15 interviews. Literature-based guidelines as suggested by Denzin and Lincoln (1994) were adhered to, ensuring validity. The respondents were asked for their expert opinions about e.g. their general judgement of collaboration in the hospitality and tourism industry (Beritelli, 2011), cooperative partnerships their firm has pursued with others at their destination (Bouncken & Kraus, 2013),

and situations where their firm would engage in coopetition (Czakoń & Czernek-Marszałek, 2020). The interviews were conducted in a narrative format. All of them were recorded and transcribed, and lasted from 28 minutes to 1 hour and 32 minutes, with an average length of 46 minutes. All interviews were conducted in German, and key quotes were translated verbatim into English. Table 2 provides an overview of the interviewed business managers' firms.

Table 2: Firm data of interviewed business managers

Business	Business type	Employees
A	Restaurant/Bar	36
B	Restaurant/Bar	60
C	Hotel	7
D	Restaurant/Bar	140
E	Hotel	17
F	Restaurant/Bar	90
G	Hotel	54
H	Hotel	40
I	Restaurant/Bar	90
J	Hotel	40
K	Restaurant/Bar	45
L	Hotel	40
M	Restaurant/Bar	20
N	Hotel	9
O	Restaurant/Bar	50

3.2 Measurements

Constructs were operationalized by adapting scales previously mostly used in a non-tourism context to fit this study's context. The dependent construct *Coopetition* measured the extent to which firms pursue and enter into collaborations with their competitors (Bouncken & Fredrich, 2012). *Environmental Conditions* measured the perception of environmental uncertainty (Kim et al., 2013; Lee, 2014) and external competitiveness (Chim-Miki & Batista-Canino, 2017b). Private and mutual benefits formed the construct *Economic Benefits* (Kim et al., 2013; Rai, 2016). The construct *Social Relationships* was used to identify the perceived bonds with a firm's cooperation partners; it measured the level of trust (Yilmaz & Kabadayi, 2006) and social interaction (Chiu et al., 2006). Destination commitment and destination dependence were combined in the construct *Destination Network* (Chim-Miki & Batista-Canino, 2017b), which captured the sense of belonging to the destination network. All these constructs were measured

on a seven-point Likert scale ranging from 1 “strongly disagree” to 7 “strongly agree”. *Family Involvement* captured the proportion of managerial positions occupied by family members (Chrisman et al., 2012), and was measured with a ratio ranging from zero to 100 percent.

Finally, several control variables were included. These were standard measures such as number of employees as an indicator of firm size, year of founding, and gender of the business manager.

3.3 Reliability and validity

A number of quality checks were conducted for all latent constructs. As the measurement items were adapted to a new context, we conducted an exploratory factor analysis (EFA). Given the main purpose of identifying and attaining composite scores of the factors underlying the adapted measurement items, we also conducted a principal component analysis. Eigenvalues showed that the first five factors explained 34%, 9%, 6%, 6%, and 5% of the variance, respectively. Factors six to eight also had eigenvalues above one, although each explained less than 3% of the variance. Solutions for five and eight factors were examined using varimax rotation. The five-factor solution explained 55% of variance and was selected because it is supported by theory and matched the bend in the scree plot.

A requirement of the exploratory factor analysis (EFA) is to exclude from the measurement model items below the 0.6 threshold (Field, 2013). One item for the *Destination Network* construct had to be dropped because it was below the threshold. All other items were included for further analysis. In addition, the minimum values for Cronbach’s α were above the recommended value of 0.7, indicating a satisfactory reliability for all constructs (Hair, 2006), and providing internal consistency. We were unable to attain a substantial increase in Cronbach’s α by deleting more items.

Table 3: Factor loadings

Measures	F1	F2	F3	F4	F5
Factor 1 - Social Relationships					
We consider our cooperation partners as perfectly honest and truthful.	0.853				
We can trust our cooperation partners completely.	0.8623				
We believe that our cooperation partners only do what is right.	0.7446		0.372		
We have great confidence in our cooperation partners.	0.8672				
We maintain close social relationships with our cooperation partners.	0.6752	0.4323			
We spend a lot of time interacting with our cooperation partners.	0.6886	0.3257			
We know most of our cooperation partners on a personal level.	0.6311	0.4810			
We have frequent communication with our cooperation partners.	0.6851	0.4122			
Factor 2 - Destination Network					
It is important for my firm to participate in a cooperative network or partner with firms or organizations at this tourism destination.		0.6296		0.3247	
I intend to maintain cooperative relationships with other firms at this destination.		0.7007			
I am very committed to partnering among firms in the sector at my destination.		0.6635		0.3804	
If the cooperation ceases between the companies, this destination will reduce its attractiveness.		0.6893			
Some firms in the sector are essential for the performance level of this destination.		0.7222			
The variety of tourist activities is essential for complementing the offer of this destination.		0.7176			
Factor 3 - Economic Benefits					
Due to our collaborations, our firm creates more value than our cooperation partner by ...					
... improving our existing competencies.			0.8105		
... improving its products and services.			0.7959		
... leveraging its market position.			0.8256		
... enhancing its organizational effectiveness.			0.8174		
Due to our collaboration, both our cooperation partner and we ...					
... gain a competitive advantage.	0.3332		0.7022		
... improve cost effectiveness.	0.4455		0.6490		
... gain greater efficiency.	0.4369		0.6670		
... improve our market positions.	0.3384		0.7096		
Factor 4 - Competition					
We are in close competition with our partners.				0.8183	
We collaborate with competitors to achieve a common goal.		0.4075		0.6762	
Active competition with our collaborators is important to us.				0.8108	
Factor 5 - Environmental Conditions					
Competitors' behavior is unpredictable.					0.6022
Competitors' behavior has a great effect on the firm's performance.					0.7019
There are many firms offering products and services that can replace our product or service.					0.6176
At our destination, there are many companies competing for the same customer segment.					0.7187
There are many tourism destinations which compete with my city/location.					0.7140
In the neighboring areas, there are a number of products, services, and tourism attractions similar to what we offer.					0.7421

Note: The one item with less than .6 for Factor 2 is excluded from the table. Factor loadings < .3 are omitted.

In terms of multicollinearity, inter-factor correlations had to be below 0.65, and the threshold for the variance inflation factor (VIF) values was 10 (Field, 2013). Table 4 shows that all inter-factor correlations met this threshold. The VIF values ranging from 1.021 to 2.170 were below the critical value of 10, mitigating concerns about multicollinearity. Finally, the chi-square value for the measurement model was significant ($KMO = .895$; $X^2 = 3603.524$; $df = 496$; $p < .01$).

Table 4: Means, standard deviations, and correlations

	# of items	Mean	SD	Cronbach's α	1	2	3	4	5
1. Social relationships	8	4.23	1.37	0.92					
2. Destination network	6	5.66	1.13	0.87	0.5389				
3. Economic benefits	8	4.67	1.34	0.93	0.6195	0.6489			
4. Coopetition propensity	3	4.56	1.68	0.80	0.3599	0.5143	0.5183		
5. Environmental conditions	6	5.13	1.05	0.70	0.0637	0.2719	0.2313	0.1921	
6. Family involvement	1	76.13	35.23	n/a	-0.0325	-0.0167	-0.1438	-0.1067	0.0092

4 Results

A series of hierarchical regression analyses was conducted to test Hypotheses H1-H4, which cover the direct effects on *Coopetition*. The results of the hierarchical regression analysis are shown in Table 5. Model 1 tested the effects of the control variables (i.e. firm size, firm age, gender, and tourism association) on the dependent variable. The results show no significant effect of the control variables on the dependent variable *Coopetition*.

Model 2 ($R^2 = 0.344$; $F = 9.399$; $p < 0.01$) included the independent variables as predictors to examine the direct effects of the independent variables *Environmental Conditions*, *Economic Benefits*, *Social Relationships*, and *Destination Network*, as well of the moderating variable *Family Involvement* on *Coopetition*. *Environmental Conditions* did not affect *Coopetition* ($\beta = 0.047$; $p > 0.05$; H1 not supported). However, *Coopetition* was positively affected by *Economic Benefits* ($\beta = 0.274$; $p < 0.01$; H2 supported). Furthermore, *Social*

Relationships had no significant effect on *Coopetition* ($\beta = -0.013$; $p > 0.05$; H3 not supported) while *Coopetition* was positively affected by *Destination Network* ($\beta = 0.341$; $p < 0.01$; H4 supported). The moderating variable *Family Involvement* had no direct effect on *Coopetition* ($\beta = -0.037$; $p > 0.05$).

Table 5: Results of the regression analyses

	Model 1	Model 2	Hypotheses
Controls	β	β	
Firm age	-.053	-.030	
Firm size	.010	-.015	
Gender	.144	.099	
Independent variables			
Environmental Conditions (H1)		.047	H1 not supported
Economic Benefits (H2)		.274**	H2 supported
Social Relationships (H3)		-.013	H3 not supported
Destination Network (H4)		.341**	H4 supported
Moderating variable			
Family Involvement		-.037	
R ²	.024	.344	
F	1.018	9.399**	

** $p < 0.01$ * $p < 0.05$

Moderation analyses were conducted to test Hypotheses H5a-H5d. A moderating variable affects the direction or strength of the relationship between an independent variable and a dependent variable (Baron & Kenny, 1986). The moderation of *Family Involvement* was tested on the relationship between *Environmental Conditions*, *Economic Benefits*, *Social Relationships*, and *Destination Network* on *Coopetition*. Hayes' templates with bootstrapping (Hayes, 2017) were used to test the direct and interaction effects of the hypothesized relations. In bootstrapping, no presumptions about the shape and distribution of the sample are needed for inferential tests (Preacher, Rucker, & Hayes, 2007). The analysis was run with 5,000 iterations for the indirect effects, with 95% bias-corrected confidence intervals. The results of the moderation analysis are illustrated in Table 6. *Family Involvement* had a positive and significant effect on the relationship between *Environmental Conditions* and *Coopetition* ($\beta = 0.007$; $p < 0.05$; [CI 95%]: 0.0003, 0.139; H5a supported). When *Family Involvement* is above 69.39%, *Environmental Conditions* and *Coopetition* were significantly related. Furthermore,

the effect of *Family Involvement* on the relationship between *Social Relationships* and *Coopetition* was positive and significant ($\beta = 0.006$; $p < 0.05$; [CI 95%]: 0.000, 0.011; H5c supported). When *Family Involvement* was above 46.49%, *Social Relationships* and *Coopetition* were significantly related. As *Family Involvement* increased, the relationship between *Environmental Conditions* and *Coopetition* as well as *Social Relationships* and *Coopetition* turned more positive. *Family Involvement* did not moderate the path of *Economic Benefits* on *Coopetition* ($\beta = 0.004$; $p > 0.05$; [CI 95%]: -0.001, 0.009; H5b not supported) as well as the path of *Destination Network* on *Coopetition* ($\beta = -0.004$; $p < 0.05$; [CI 95%]: -0.011, 0.004; H5d not supported).

Table 6: Results of the moderation analyses

Moderation	Effect	Boot Standard Error	95% BC Conf. Interval		Hypotheses
			Lower	Upper	
(EC x FI) → CO (H5a) $R^2 = .069$ $F(167) = 4.146$	.007	.003	.0003	.139	H5a supported
(EB x FI) → CO (H5b) $R^2 = .280$ $F(167) = 21.675$	.004	.002	-.001	.009	H5b not supported
(SR x FI) → CO (H5c) $R^2 = .394$ $F(167) = 10.207$	.006	.003	.0002	.011	H5c supported
(DN x FI) → CO (H5d) $R^2 = .533$ $F(167) = 22.136$	-.004	.004	-.011	.004	H5d not supported

Notes: CO = Coopetition; EC = Environmental Conditions; EB = Economic Benefit; SR = Social Relationships; DN = Destination Network; FI= Family Involvement

5 Discussion

The empirical results of this study provided partial support for the proposed research model of antecedents of coopetition among hospitality SMEs, with two antecedents directly and positively influencing *Coopetition: Economic Benefits* and *Destination Network*. These findings for the hospitality context show that the benefits for firms and destinations in this

industry are indeed interdependent (Strobl & Kronenberg, 2016), and opposed to Gnyawali and Park's (2009) multi-level model. In fact, from a game theory point of view, firms in these destinations often "sit in the same boat", meaning coopetition is often the only and therefore meaningful way to successfully do business. As for *Family Involvement* as a moderator, the findings show that it has a significant and positive effect on the relationships between *Environmental Conditions* as well as *Social Relationships* and *Coopetition*.

To be able to assess and better understand these findings, they are discussed in the context of the related literature and interpreted with data from follow-up interviews in mind. This discussion section also provides some key quotes from the respondents.

Environmental Conditions addressed the uncertainty of market conditions and competitor behavior (Ritala & Hurmelinna-Laukkanen, 2013). Although the hospitality industry is known for a high degree of competition (Della Corte & Sciarelli, 2012; van der Zee & Vanneste, 2015), the results did not show a significant effect of *Environmental Conditions* on the decision to coopete. We found support for this in the following quote:

"Competition invigorates business; every successful hotel operation at the destination is an impulse for you not to become too narrow-minded, which can be dangerous in some business areas." (Business J, Hotel, 40 employees)

This suggests hospitality SMEs are aware of intense competition, and understand the need for constant evaluation and firm improvement as a result. However, they do not automatically feel forced to enter cooperative relationships. This result is in line with Della Corte and Aria (2016) and Czakon and Czernek (2016) who argue that the environment is an important albeit not main antecedent of coopetition for SMEs in tourism networks.

However, for family-run hospitality SMEs (i.e., firms with a high degree of *Family Involvement*), *Environmental Conditions* are an antecedent of *Coopetition* as shown by the

significant and positive moderating effect when *Family Involvement* reaches 69.39% of managerial positions occupied by family members. One reason for this is that family SMEs are more vulnerable to environmental changes due to their often stand-alone, family-driven position, a danger that is often also referred to as “entrenchment” within the SEW concept (Gómez-Mejía et al., 2007). This was also emphasized in the following quote:

“If the operating result is insufficient, businesses are forced to cooperate. As long as you are satisfied with the business success, family firms mainly operate on their own. Risky and uncertain situations definitely increase the willingness to cooperate: We as a family also realized that cooperation with competitors can be useful in exactly these situations.” (Business A, Hotel, 36 employees)

Economic Benefits refers to rewards for the firm and its coopeting partners. The results showed that *Economic Benefits* had a significantly positive influence on *Coopetition*, which was also well-demonstrated in this quote:

“In the end, cooperations arise because of a cost factor, where we collaborate with other companies to share costs.” (Business G, Hotel, 54 employees)

Morris et al. (2007) and Czakon and Czernek (2016) show that mutual benefits of cooperative relationships between firms are crucial and consistent with the ideas of rational game theory decision-making. For hospitality firms, Friedrichs Grängsjö (2003) identifies commercial attitudes of cooperative relationships as drivers that generate profits. Indeed, Wang and Krakover (2008) found that firms make conscious decisions to engage in cooperation or competition activities, whereby reciprocal advantages are the main reason for cooperative relationships (Della Corte & Aria, 2016). Hence, the economic orientation of the focal firm is critical to the cooperative decisions at hospitality SMEs.

Social Relationships involve the existence of trust and confidence placed in partners, as well as meaningful communication between them. This study did not find a significant effect of *Social Relationships* on *Coopetition*. It appears that hospitality SMEs, despite their often social nature (Czernek-Marszałek, 2021), are more rational actors compared to actors that are swayed by personal relationships (Czernek & Czakon, 2016). Hence, hospitality SMEs might keep interpersonal relationships at arm's length, instead striving for a more direct path to business success without establishing long-term, deeply invested relationships that might constrain it, as shown in these quotes:

“Local clubs have a positive effect on collaboration, you just know each other, meet people you usually don't have much to do with in a nice atmosphere. Then you also exchange ideas, which certainly makes it easier to cooperate.” (Business D, Restaurant/Bar, 140 employees)

“If you know and understand each other ‘too well,’ it will unfortunately certainly influence the collaboration in tourism. Relationships should not be exploited for business purposes. That should not be the case, because relationships and the business should be treated separately.” (Business F, Restaurant/Bar, 90 employees)

However, for family-run hospitality SMEs, *Social Relationships* are a significant antecedent of *Coopetition*, as shown by the significant and positive moderating effect of *Family Involvement* when reaching a ratio of 46.49% of managerial positions occupied by family members. Family firms focus on long-term relationships with tight emotional binding and trustworthy personal contacts (Eddleston et al., 2010), as referred to in the SEW concept (Amato, Basco, Gómez Ansón, & Lattanzi, 2020). Hence, while SMEs might be apprehensive about working with people or businesses they know, family-run hospitality SMEs carefully select whom they collaborate with. This was best emphasized with this quote:

“I think the family has an influence on the cooperative behavior. It’s easier than with others, because the level of trust is higher, and you assume that the cooperation works better than with someone else you don’t know that well.” (Business E, Hotel, 17 employees)

Finally, *Destination Network* is a firm’s interdependence with the destination’s appeal and performance, as well as a firm’s commitment towards the destination network. In line with Friedrichs Grängsjö and Gummesson (2006), this study’s findings demonstrate that this is the case for hospitality SMEs:

“Everyone within the destination depends on tourism, thus everyone has to follow one direction, because we all have the same source of income. The cooperation within the region works very well. Businesses do not work against each other, but look out for the community.” (Business D, Restaurant/Bar, 140 employees)

Morris et al. (2007) identify commitment as an important factor for cooperative relationships among SMEs. Commitment to a destination network achieves the momentum needed for coopetition (Della Corte & Aria, 2016). Furthermore, the results of this study, together with the existing literature, emphasize firms’ interdependence as a crucial factor for coopetition in general and between hospitality firms in particular (Chim-Miki & Batista-Canino, 2017b; Padula & Dagnino, 2007).

6 Conclusion

The objective of this study was to test antecedents of coopetition that are relevant to hospitality SMEs, while considering the influence of family involvement among these firms. This study aimed to close the research gap found at the intersection of topics with specific relevance for

coopetition in the hospitality industry, such as the role of destination networks (Chim-Miki & Batista-Canino, 2017b; Czakon & Czernek-Marszałek, 2020; Czakon, Klimas, et al., 2020). As such, this study is one of the first to provide empirical insights into coopetition of hospitality SMEs, which also contributes not only to hospitality research, but to coopetition research at large.

Our findings highlight considerations for economic benefits and destination networks as antecedents of coopetition among hospitality SMEs, which strengthens the idea that tourism coopetition is a socially embedded economic activity (Czernek-Marszałek, 2020). Therefore, looking at it from one single perspective be it either economic or social would be incomplete. Moreover, for firms with a high degree of family involvement, we found that uncertain and competitive environmental conditions as well as social relationships are antecedents of coopetition. These findings further emphasize the relevance of family involvement for social embeddedness (Kallmuenzer & Peters, 2017).

6.1 Theoretical implications

This study is a valuable extension to the existing literature as it investigates the overlap of coopetition, family involvement, and SMEs in the hospitality industry. First, the findings underscore how industry and firm contexts such as the hospitality industry that is made up mainly of family SMEs affects coopetition. For example, membership in the destination network, and desired economic benefits such as access to resources and a better market position, are influential antecedents of coopetition in hospitality SMEs. This stems from these antecedents directly addressing the disadvantages faced by SMEs. However, neither economic benefit nor destination network involvement are more relevant for family-run SMEs.

Second, coopetition in family firms has to date been empirically unexplored, with the exception of one study by Gast et al. (2019) that relies on a qualitative methodology in the context of family-run SMEs in the IT industry. By employing a mixed-methods approach the

influence of family involvement on engaging in coopetitive behavior, our study contributes a more fine-tuned understanding of the coopetitive behavior of family-run SMEs in a different industrial setting.

In this study, the destination network had the greatest effect on coopetition. Future studies might want to concentrate on this important role of the destination network for the business of hospitality firms, as also identified by Beritelli (2011) or Strobl and Kronenberg (2016). More generally, it appears relevant to investigate the settings of coopetitive behavior among SMEs in contexts other than hospitality, as well as in more nuanced areas of hospitality. One example here could include an identification of the distinctions between hospitality firms located in urban versus rural destinations and how such locations affect coopetition.

Furthermore, our results make clear that family firms behave differently as a result of family involvement and SEW goals (Classen et al., 2012). They therefore might not only influence antecedents of coopetition, but the characteristics of coopetitive relationships as well, not to mention the effect of coopetition between family firms. One way to approach this is to consider the heterogeneity of family firms (Chrisman et al., 2012) stemming from how different family members and family structures influence coopetitive propensity.

The complex and dynamic nature of coopetition (Bengtsson & Raza-Ullah, 2016; Padula & Dagnino, 2007) can be best investigated in light of the COVID-19 pandemic that has wreaked havoc among hospitality businesses worldwide (e.g., Harms, Alfert, Cheng, & Kraus, 2021). The specific impact of this kind of crisis on coopetition, such as the resulting consumer- and government-driven push for increased digitalization (Breier et al., 2021) to reduce the spread of the virus (e.g. hotel apps for check-in or restaurant apps to place orders), and the even more important role of familial and regional relationships could serve as coopetition enablers well in times of social distancing.

6.2 Managerial implications

Several managerial implications for hospitality managers can be derived from the results. Most importantly, the potential economic benefits for SMEs as well as the need for strong destination networks and family involvement as enablers of coopetition require the facilitation of coopetition offerings, for example through round tables or workshops for firm managers. Knowing and capitalizing on relevant antecedents of coopetition can help to reveal or create potential coopetitive relationships (Czakov & Czernek, 2016; Dorn et al., 2016). These might specifically enhance a firm's commitment towards coopetitive relationships and consequently have a positive influence on their success (Chin et al., 2008)

As the destination network had the greatest influence on coopetition propensity in this study, it becomes clear that the involved actors need to become aware of their interdependencies. This includes an awareness of the importance of the destination and other destination businesses for the focal SME, and the importance of the SMEs for the destination and its businesses. Hence, a destination network involves the firm's interdependence regarding destination attractiveness and performance, as well as a firm's commitment towards the destination network (Chin et al., 2008; Wang & Krakover, 2008). This means that the performance of coopetitive hospitality firms is not only dependent on their own competencies, but also on the destination network they belong to (Peters & Kallmuenzer, 2018; Tajeddini, Martin, & Ali, 2020). This finding also plays a major role for destination management organizations, as firms are willing to enter coopetitive relationships when there is a clear benefit for the destination (Wang & Krakover, 2008). Furthermore, firms within the destination know that the destination network is crucial for most of the involved firms within the destination, and that it is important that they pull together and cooperate.

In addition to the destination network, economic benefits were seen as the most relevant for coopetition propensity among hospitality SMEs. Coopetition implies common benefits (although not necessarily a fair distribution of them), and their respective inputs (Padula &

Dagnino, 2007). Businesses often still focus on their advantages and act in their own interests instead of capitalizing on the advantages of coopetition, so business owners should be aware that coopetitive relationships need to be beneficial for all parties involved (Wang & Krakover, 2008).

For family-run hospitality SMEs, social relationships and environmental conditions were seen as relevant antecedents of coopetition propensity. Knowing about these antecedents is not only important for family business managers, but also for non-family firms to coopete with them (Berrone et al., 2012). Social relationships might play a crucial role when it comes to the decision-making between cooperation partners from the family business side (Alves & Meneses, 2015), so it might be worthwhile to establish long-term relationships that can enable optimal responses in times of uncertainty and intense competition.

6.3 Limitations and future research

Some limitations in this study should be acknowledged, which can also provide sources of future research. While this study captures core constructs for achieving coopetition in the hospitality industry, future research could investigate the performance outcomes of this kind of behavior (Bouncken & Fredrich, 2012).

Moreover, it would be interesting to investigate the role of family business owner aspects such as leadership traits and family characteristics, including the regional network and transgenerational thinking that could possibly help maintain coopetitive relationships (Kallmuenzer et al., 2019).

Concerning the phenomenon of social embeddedness of tourism firms in their destination, future research might want to investigate the issue of over-embeddedness, also called the paradox of embeddedness, which can threaten business performance as the network only focuses on its relationship instead of adaptation to market changes (Czernek-Marszałek, 2020; Uzzi, 1997).

Furthermore, the root of taking coopetition for granted lies at the intersection of competitive dynamics and institutional pressure, which to date has received little attention in hospitality research. However, external pressures can trigger vast internal changes such as new business models for continued firm success (Moscardo, 2008). A future study could also investigate the effect of coopetition on hospitality firm performance (Bouncken & Fredrich, 2012), potentially at the destination level as it regards destination performance.

A single-respondent one-off survey design was chosen for the quantitative part of this study, which always creates the risk of potential bias. This risk was mitigated by follow-up interviews, which allowed for further interpretation of the identified effects. A more longitudinal study accompanying hospitality SMEs and their cooperative ventures could provide further insights into internal decision-making processes and help determine how, for example, the institution of the family simultaneously affects multiple aspects of a family-run hospitality firm; for such a longitudinal single-case study approach in tourism, see e.g. Warren, Becken, and Coghlen (2018).

Finally, this empirical research was conducted in western Austria; other tourism destinations might show different results due to their specific regional and cultural characteristics.

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