

## Doctoral Thesis Review – *Anmeldelse av doktoravhandling*

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**Engeset, Agnes Brudvik. 2021. *Store tanker i små bygder? Overlevingsevna blant familiebedrifter i norsk distriktsreiseliv*.** Doctoral Theses at NTNU, 2021:218. Department of Geography, Faculty of Social Sciences, Norwegian University of Science and Technology, Trondheim. 114 pp. + Articles. ISBN 978-82-326-4784-2 (print version), ISBN 978-82-326-4785-9 (electronic version).

The main focus of the thesis is Norwegian rural tourism and how different types of family-owned businesses deal with external and internal challenges to ensure long-term survival. Agnes Brudvik Engeset poses the following two overarching research questions in her thesis: How can the long-term survival of different types of rural tourism firms be understood using the concept of 'family firm resilience'? What role does 'embeddedness' play in the long-term survival of the firm? The thesis consists of two main parts: an introductory synthesis, following by a part comprising three articles.

The introductory synthesis is made up of five chapters, respectively containing an introduction, the theoretical framework, the methodology, a summary of the three articles, and the discussion and conclusion. The text has a clear structure, it is easy to follow and readable. The introduction presents the theme of the thesis and the context of rural tourism in Norway. A further three, more detailed, research questions are presented: (1) What external and internal challenges do the owners of farm tourism businesses and family-owned rural hotels perceive and how do they respond to those challenges? (2) What human and social capital do farm tourism businesses and family-owned rural hotels possess and what role do these forms of capital play in the long-term survival of the firms? (3) What external resources do farm tourism businesses and family-owned rural hotels make use of to strengthen their long-term survival and what role does social and place-based integration play?

In posing the questions, Engeset identifies a lack of empirical research on family-owned hotels in rural areas, as they are not included among the small-scale tourism

businesses often researched in rural tourism studies. This is the focus of attention in two of the articles, with the explicit goal of filling this gap in research.

The main theoretical frameworks that the thesis relies on are described in Chapter two. The concepts and processes of importance to the study are presented in detail and there is a discussion of how they contribute to Engeset's study. She takes her point of departure in concepts such as tourism, resilience and family businesses in general, and goes on to concentrate on family-firm resilience and embeddedness, which together contribute to our understanding of the long-term survival of the businesses.

The thesis uses qualitative methodology, which is presented in Chapter 3. Engeset describes how her research questions have been developed through a constructivist lens and a qualitative point of departure. She describes the ethical pitfalls and the critical reflexivity, which she argues is pivotal in her research. In this regard, she demonstrates a depth of understanding and knowledge of the role of the researcher and the methods that can be used to gather information and understanding about the world and human activity. The strategic selection of different types of family-owned businesses is based on previous research and the research gaps identified in the reviewed literature. The businesses are typical of the geographical research area; they are not selected to be statistically representative. Engeset makes a point that the selection is only based on the supply side and does not take into consideration other actors or collaborators. This may be considered a limitation. There is a lack of a discussion of what information cannot be gained from the chosen point of departure. It is not clear how Engeset works with 'analytical generalisations' in this specific study. In general, the discussion in the first part is somewhat simplistic and lacks a critical view on theoretical and conceptual frameworks developed in completely different geographical contexts. This is especially evident in the definitions and understanding of 'the rural'. Nonetheless, Engeset shows that she has a good understanding of the different parts of the research process and she succeeds in presenting the content of her study in an interesting way.

Finally, at the end of the first part of the thesis, the context of Norwegian rurality in which the family-owned businesses are situated does not come out clearly.

There is relatively little information about the situation that the businesses are facing in terms of larger scale trends in tourism and in society at large in Norway, the Nordic countries and globally. Hence, the thesis is rather weakly anchored in the geographical field of enquiry. The rural context could have been discussed more in terms of sense of place, relative distance to the main markets, population concentration, and infrastructure, as well as the wider context of business in rural areas in general.

The second part (Chapter 4), includes Articles 1, 2 and 3, respectively as follows:

Engeset, A.B. & Heggem, R. 2015. Strategies in Norwegian farm tourism: Product development, challenges, and solutions. *Scandinavian Journal of Hospitality and Tourism* 15, 122–137.

Engeset, A.B. 2020. 'For better or for worse' – the role of family ownership in the resilience of rural hospitality firms. *Scandinavian Journal of Hospitality and Tourism* 20, 68–84.

Engeset, A.B. "Engagement or avoidance" – Local embeddedness of rural hospitality firms'. Submitted to *Entrepreneurship and Regional Development* June 2020.

Article 1 takes as its point of departure the challenges facing rural tourism in Norway, such as tougher market environments, strong competition, and a demand for more coordinated and improved quality products. Farm tourism operators must meet these challenges in a situation where the farm is also the family's home, and there are more than economic motives for engaging in tourism. The research question addressed by the authors is what kind of strategies for product development are found among farm operators in this situation, and what challenges and solutions result from these strategies. The article demonstrates relevant and interesting challenges and strategies in Norwegian farm tourism, brought out through illustrative citations from the interviews. This is a valuable contribution to an understanding of the difficult balance that the families and/or operators face in safeguarding economic and social concerns and motives or household ones. The article links its empirical findings to relevant theoretical discussions concerning lifestyle entrepreneurs, phases in the development of rural tourism, and hosting roles.

Article 2 investigates how family ownership contributes to the survival and resilience of rural family-owned hotels. The research question addressed by Engeset is what external and internal challenges family-owned hotels in rural Norway have faced and how the owners have responded to those challenges. Furthermore, Engeset asks what constitutes the human and social capital of the owning families and how do the different types of capital build family-firm resilience. The article has a broad theoretical approach, whereby it combines theories on resilience and family businesses generally with theories on tourism. The study on which the article is based had a historical approach, including interviews with two generations of the hotel

owners and discussing how they had met challenges during the 1960s, 1970s and 1980s, such as the oil crisis in 1973. The analysis shows, among other things, how human and social capital was related to the entrepreneurial mindset, willingness to undertake hard work, complementary competence, respect, and commitment contribute to build resilience. From the research, Engeset contributes to knowledge of a sector of tourism in which there has been little previous research. She contributes to theoretical development within the fields of resilience and family-owned businesses. She provides a balanced discussion, showing how the social and human capital within the family can not only be a strength but also an obstacle to resilience.

The point of departure in Article 3 is the new challenges facing rural tourism due to changes in the markets, for example the growth of experience-based tourism. To meet these challenges, rural tourism operators must develop products that include local resources. Embeddedness, understood as entrepreneurs' relation to contexts and places, is the central concept and theoretical foundation for the article. Special attention is given to their relation to the spatial context, including both material and social elements. The following research questions are asked: What are the essential resources for hotel owners in their local spatial context, how can hotel owners be characterized by different types of embeddedness and are there any differences between the former and current generation of hotel owners regarding types of embeddedness? As a result of her analysis, Engeset finds four approaches to local resources and embeddedness: the successful, the unsuccessful, the reorganizing, and the distance-seeking approach. A new sliding scale for embeddedness is proposed to give a more nuanced understanding of embeddedness than earlier suggested typologies. The article has an exciting and promising theoretical approach and aims, and gives a good basis for further investigation of this theme.

In sum, the thesis provides an interesting and relevant contribution to the topic of family-owned tourism businesses in rural areas. The thesis holds its promise to deepen the knowledge of family-owned hotels in rural Norway and to include the family in research on long-term survival strategies to meet internal and external challenges.

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