Family Business Research: A Literature Review

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Abstract

Family businesses are an important pillar of the global economy because these entities not only contribute towards GDP but also hire a substantial number of employees. This study contributes to family business research and analyzes its underlying theories. A systematic literature review based on the Web of Science (WoS) database of family business research publications has been conducted to support this study. The subsequent bibliometric and scientometric analysis identifies the main theories and concepts of family business research in terms of their relevance to researchers. One of the main findings, based on 5,013 identified documents, proclaims that the Socioemotional Wealth theory is the most considered theory in the past 10 years and it has been gaining significant prominence in the past 5 years. Based on citations, the most influential authors are: Chrisman, J. J., USA and Kellermann, F. W., Germany with more than 70 publications each and an average of 86.7 citations per publication. As a country, the United States contributes the most to family business research with 27% of publications and as a continent, Europe contributes the most with 48%. However, majority of publications are published by a single author or with a co-author and 18% of the authors have published more than 50% of the publications.

Keywords: Family Business, Theories, Systematic Literature Review, socioemotional wealth theory

1 Introduction

Family businesses represent an important pillar of the global economy (Eddleston et al., 2019; Eddleston et al., 2020; Gagné et al., 2019; Massis et al., 2018), as well as employers or as economic growth engines (Araya-Castillo et al., 2021; Bjuggren et al., 2011). These entities are dominating among small, medium, and large businesses (Alonso Dos Santos et al., 2020). About 70 to 90 percent of the world's GDP is generated by family businesses, which subsequently help in wealth creation, generating employment, and bringing prosperity to most of the countries (Araya-Castillo et al., 2021). Beginning in the 1980s, academic interest in family firms increased significantly (Pieper, 2010), as Figure 1 depicts.

Scholars study the characteristics of family businesses on the basis of a wide variety of theories and concepts, as there is a lack of a single accepted theory on the subject (Alonso et al., 2019). Well-known concepts are differentiating family firms from non-family firms based on socioemotional wealth theory (Berrone et al., 2012; Gómez-Mejía et al., 2007), Social Capital theory (Arregle et al., 2007; Danes et al., 2009; Wu, 2007), Familiness theory (Chrisman et al., 2005; Habbershon et al., 2003; Pearson et al., 2008), or Sustainable Family Business Theory (Fitzgerald et al., 2010; Olson et al., 2003).

„For while founding our perspectives on established literature is a good practice, we also need to broaden our perspectives to seek out new ways of “seeing” and theorizing.“ (Payne, 2018, p. 173) The aim is to contribute to the discussion on the relevance of various concepts by surveying and analyzing the respective concepts and theories and their influences on the research on family businesses.

This paper is organized as follows. First, I explained the research methodology by outlining criteria for literature selection for data analysis. Thereafter, I presented the major findings of the SLR. Finally, I offered future research opportunities to boost the understanding of family businesses based on a critical analysis of existing research.

2 Methodology

A systematic literature review (SLR) of contributions to family history research has been conducted in this paper. The SLR approach is considered a reliable tool, especially for generating and assessing new knowledge, and is known to minimize various assessment biases (Ali & Usman, 2018; Palmarini et al., 2018). The SLR guidelines—proposed by (Denyer & Transfield, 2009)—include the following four steps:

- Step 1: Identification of the research object(s)
- Step 2: Setting of the research object (conceptual boundaries)
- Step 3: Data collection based on criteria
- Step 4: Validation of the research results

The procedural approach provides the best transparency and traceability (Hökkä et al., 2014; Töpfer, 2012)

2.1 Identification of the research targets

The purpose of this article is to present the current state of research in the field of family businesses and to set an agenda for further studies. Based on the context-interventionmechanism-outcome (CIMO) logic (Denyer & Transfield, 2009), the following review questions were formulated:

- 1) What family business research articles have been published?
- 2) How do family business research articles differ in terms of the theories and concepts used?

2.2 Setting of the research object (conceptual boundaries)

To identify the relevant publications, it is necessary to define the search criteria, the database, the search term, and the publication period (Woschank et al., 2020). The basis of the search is the Web of Science Core Collection database. Alternative databases, such as Scopus also produce similar results.

To obtain all articles on family business research, the following search terms based on keywords family business, family firm, family-owned firm, as well as family-owned business and Web of Science Categories: 'Business', 'Business and Finance', and 'Economics and Management' were chosen:

(TI=((("family business*" OR "family firm?" OR "families business*" OR "families firm?" OR "family owned firm?" OR "family owned business*") OR AB=((("family business*" OR "family firm?" OR "families business*" OR "families firm?" OR "family owned firm?" OR "family owned business*") OR AK=((("family business*" OR "family firm?" OR "families business*" OR "families firm?" OR "family owned firm?" OR "family owned business*") OR KP=((("family business*" OR "family firm?" OR "families business*" OR "families firm?" OR "family owned firm?" OR "family owned business*")) AND SU=("Business" OR "Business, Finance" OR "Economics" OR "Management"))

2.3 Data collection based on criteria.

The following criteria provide the basis for the search - see Table 1:

Table 1: Criteria for the Database search

Keywords	WoS Categories	Language	Timeframe	Paper Type	Database
Family business	Business	English	no limit	no limit	WoS Core Collection
Family firm	Business and Finance	German			
Family owned firm	Economics				
Family owned business	Management				

Performing the database search in the WoS database based on the criteria listed in Table 1 resulted in 5,013 hits, which were used for further analysis. For further analysis, the hits were exported as 'Full Record and Cited References' as well as the 'Citation Report'.

2.4 Validation of the research results

A content analysis of the papers was performed; the title, abstract, and author keywords were searched and the keywords were highlighted - Table 1. All 5,013 hits contain the keywords mentioned and are accordingly relevant for further analysis.

3 Review findings

In this section, the results of the SLR are analysed in a descriptive manner. The full text of the title, author keywords, and abstract of the identified papers are also discussed in the content analysis section.

3.1 Descriptive Analysis

An analysis of the total identified publications on family businesses shows that family research on business, finance, economics, and management started in 1980s and witnessed a significant increase in the number of papers published per year since 2000. Corresponding to the publications, within a period of about five years, the number of citations increased significantly- see Figure 1.

Figure 1: Publications and Citations per Year – Range: 1900 - 2021

A detailed analysis of the period between 2000-2020 shows that the publications follow a linear growth of $\text{Pub}(\text{Year}) = 26.7(\text{Year}) - 71.1$ with a coefficient of determination of $R^2 = 96.7\%$ and the citations follow a polynomial growth of third degree of $\text{Cit}(\text{Year}) = 4.0(\text{Year})^3 - 52.01(\text{Year})^2 + 355.9(\text{Year}) - 594.6$ with a coefficient of determination of $R^2 = 99.3\%$. The year 2021 was not considered because the data was collected on May 25, 2021 and therefore it was incomplete.

Figure 2: Publications and Citations per Year - Range: 2000 – 2020

An analysis of the publications with respect to the country of origin shows that scholars from the USA contributed the most to family business research with 27% (1,346) of the publications, followed by Italy with 11% (530), and England with 10% (496) of the publications. The analysis was conducted using the software OSViewer. Publications from 1900 - 2021 were used as full coverage, including cited references from WoS and bibliographically analyzed - see Figure 3.

Figure 3: Documents published by Countries

Source: Data from WoS (2021), produced with VOSviewer

The strength of the connecting lines represents the cooperation of the respective countries, which is based on the number of joint publications. The analysis of the publications is based on the provenance of the mentioned authors. Since many publications were brought out by more than one author, these are therefore listed several times.

After aggregating the individual countries into continents, it is seen that Europe is the most productive continent with 48% of publications, followed by North America with 26%, and Asia with 19%.

Table 2: Documents published by Regions

Continent	Documents	%
Europe	3,246	48%
North America	1,756	26%
Asia	1,275	19%
South America	113	2%
Africa	47	1%

After clustering the identified 5,013 documents by the document type, it is observed that 78% of the publications are articles, 11% are proceedings papers, and 7% are book chapters.

Figure 4: Classification by Document Type

In the following, 5,013 documents in total were examined bibliographically to come up with a statement about the respective authors and their productivity.

According to the bibliographic investigation results, the most productive authors in the range of the family business research are: De Massis, Alfredo (England) with 75 publications in the first place, Kellermanns, Franz Willi (Germany) with 72 publications in the second place, and Chrisman, James J. (the USA) in the third place with 71 publications.

Table 3: Most Productive Authors on Family Business Research

Rank	Name	Publications	Rank	Name	Publications
1	De Massis A	75	11	Voordeckers W	37
2	Kellermanns FW	72	12	Memillie E	32
3	Chrisman JJ	71	13	Chirico F	30
4	Miller D	52	14	Wright M	30
5	Sharma P	52	15	Kotlar J	29
6	Chua JH	46	16	Kraus S	29
7	Le Berton-Miller I	42	17	Danes SM	27
8	Nordqvist M	42	18	Kammerlander N	27
9	Eddleston KA	41	19	Steijvers T	27
10	Calabro A	37	20	Basco R	26

Considering the influence of individual authors on family business research based on citations instead of their productivity, only 7 authors from the top 10 in terms of productivity can be found in the top 10 in terms of their influence. At place 5 has been added Gomez-Majia, Luis (USA), place 7 Anderson, Ronald (USA) and place 8 Reeb, David M. (Singapore).

Figure 5: Productivity by Authors

Source: Data from WoS (2021), produced with VOSviewer

Table 4: Most influential Authors on Family Business research

Rank	Name	Documents	Citations	H-Index	Total Papers	Total Citations
1	Chrisman JJ	71	7097	46	110	8954
2	Kellermanns FW	72	5324	44	110	6561
3	Miller D	52	5002	72	147	22521
4	Chua, JH	46	5045	32	67	5529
5	Gomez-Mejia, LR	30	4898	49	117	13485
6	Le Breton-Miller I	42	4754	25	42	4856
7	Anderson RC	7	3937	11	19	4780
8	Reeb, DM	7	3937	20	32	5926
9	De Massis, A	76	3294	35	101	3859
10	Eddleston, KA	46	2965	33	75	4352

Source: Data from WoS (2021)

Altogether 5,013 publications were published by 7,246 authors either as sole author or coauthor. Figure 6 shows the influence of the authors as the size of the circle and the respective connection among the authors.

Figure 6: Influence and connection by Authors

Source: Data from WoS (2021), produced with VOSviewer

An analysis of 5,013 documents in terms of sources shows that these appeared in 1,032 different sources. Limiting the sources to a minimum of 10 publications reduces the sources to 95 journals, which together published 2,972 (59.3%) of the documents, with an average of 31.2 citations per document. Table 5 shows 10 sources with the highest number of publications in the field of family business research, which are exclusively journals.

Rank	Name	Documents	Citations	H-Index	Country	SJR ¹
1	Family Business Review	345	18008	105	USA	Q1
2	Journal of Family Business Strategy	225	4507	44	England	Q1
3	Entrepreneurship Theory and Practice	210	15465	155	USA	Q1
4	Journal of Family Business Management	200	1120	16	England	Q1
5	Journal of Small Business Management	89	3335	112	England	Q1
6	Business History	78	587	35	England	Q1
7	Journal of Business Research	78	2626	195	USA	Q1
8	Small Business Economics	77	3083	131	Netherlands	Q1
9	Journal of Business Ethics	65	1901	187	Netherlands	Q1
10	Corporate Governance: An International Review	52	1527	85	England	Q1
	Summary	1,419	52,159			

Table 5: Most influential Journals on Family Business research

Figure 7: Publications by Scientific Journals

¹ Scimago Journal & Country Rank

Source: Data from WoS (2021), produced with VOSviewer

Finally, the Web of Science categories are compared with the research areas. It shows that the majority of the selected WoS categories according to Table 1 are assigned to the research area of Business and Economics.

Figure 8: WoS Categories vs. Research Areas

3.2 Content Analysis

To answer the second review question — How do family business research articles differ in terms of the theories and concepts used? — the hits were searched for the terms ‘Theory’, ‘Model’, ‘Perspective’, ‘View’, and ‘Capital’ in the fields Title, Abstract, and Author Keywords - see Table 6. Classifying this result, 41 different theories and concepts could be identified, which will be analyzed in further detail.

Table 6: Identification of theories and concepts used in Family Business research

Keywords	Hits
Theory	929
Model	555
Perspective	445
View	593
Capital	375
Total	2897

As presented in Table 7, the identification and further classification led to 41 theories and concepts used in family business research that were explicitly mentioned in the title, author keywords, or abstract.

Table 7: Identification of theories and concepts used in Family Business research

Agency Theory	Family Resource Management	Socioemotional Wealth theory
Behavioural Agency Theory	Family Systems Theory	Stagnation Theory
Boundary Theory	Game Theory	Stakeholder Theory
Bulleye Model	Human Capital	Stewardship Theory
Capabilities View	Image Transfer Theory	Survivability Capital
Conservation of Resources	Institutional Theory	Sustainable Family Business Theory
Contingency Theory	Knowledge-Based View	Sustainable family Business Theory II
Contractual Governance Theory	Organizational Identity	Systems Theory of Behaviour
Corporate Social Responsibility Theory	Prospect Theory	Team Theory
Economics Theory	Resource Dependency Theory	Theory of corporate governance
Entrenchment Theory	Resource-Based View	Theory of Hubris
Familiness	Role Theory	Theory of Planned Behaviour
Family Embedded Theory	Social Capital	Upper Echelons Theory
Family Influence Scale	Social Network Theory	

Theories or concepts as a classification criterion can be assigned to 1,649 documents that explicitly mention the particular theory or model in the title, author keywords, or abstract. The most frequently mentioned Theories or Concepts are ‘Socioemotional Wealth theory’ with 20% (330 hits), followed by ‘Agency-Theory’ with 18% (290 hits), and ‘Social Capital’ with 10% (167 hits). Altogether, these theories and concepts already account for 48% of all publications.

Table 8: Most prominent Theories or Concepts used in Famil firm research

Rank	Theory / Model	Documents	%
1	Socioemotional Wealth theory	330	20
2	Agency Theory	290	18
3	Social Capital	167	10
4	Family Influence scale	106	6
5	Familiness	101	6
6	Resource Based View	100	6
7	Stewardship Theory	90	5
8	Human Capital	88	5
9	Institutional Theory	51	3
10	Contingency Theory	49	3

To go into more detail, the Socioemotional Wealth theory approach is analyzed as a representative example. The exemplary results are presented in the summarized form in the table for the 10 most frequently mentioned theories and concepts, see Table 10.

Research on family businesses basically started in 1980s (Pieper, 2010) and experienced a

significant increase since the beginning of the 21st century - cf. Figure 1. The Socioemotional Wealth theory, which was introduced in 2007, (Gómez-Mejía et al., 2007) started receiving significant attention since 2009 - cf. Figure 9

Figure 9: Publications and Citations on Family Business and Socioemotional Wealth theory from 1967 - 2020

More detailed analysis of the past 10 years (2011 - 2020) shows that publications in a Socioemotional Wealth theory context follow a linear growth of $\text{Pub}(\text{Year}) = 5.7(\text{Year}) - 1.4$

with a coefficient of determination of $R^2 = 94.34\%$ and citations follow a linear growth of $\text{Pub}(\text{Year}) = 271.9(\text{Year}) - 538.7$ with a coefficient of determination of $R^2 = 91.3\%$. The year 2021 was not included because the data was collected in May, 2021 and therefore the data is incomplete – cf. Figure 10.

Figure 10: Publications and Citations on Family Business and Socioemotional Wealth theory from 2011 - 2020

Further reduction of the period under consideration from 10 to 5 years (2016 - 2020) shows that publications in the context of the Socioemotional Wealth theory follow a linear growth of $\text{Pub}(\text{Year}) = 6.9(\text{Year}) + 22.3$ with a coefficient of determination of $R^2 = 86.56\%$ and citations follow a linear growth of $\text{Pub}(\text{Year}) = 453.1(\text{Year}) - 259.5$ with a coefficient of determination of $R^2 = 97.47\%$ - cf. Figure 11.

Figure 11: Publications and Citations on Family Business and Socioemotional Wealth theory from 2016 - 2020

Comparing the two time periods suggests that research interest in the Socioemotional Wealth theory has increased, as both the slope of the regression lines of publications and citations have increased – cf. Table 9.

Table 9: Result of a linear Regression of the Publications and Citations on FF and SEW

Timeframe	Publications		Citations	
	t	R ²	t	R ²
2011-2020	5.7	94.3%	272	91.3%
2016-2020	6.9	86.6%	453	97.5%
Change	+ 22%		+ 67%	

Following the same procedure as in the previous analysis, the results for the other theories and concepts are as follows, as shown in Table 10:

Table 10: Most prominent Theories or Concepts used in Famil firm research - Publications

Rank	Theory / Model	Publications					Citations				
		2011 - 2020		2016 - 2020		Change [%]	2011 - 2020		2016 - 2020		Change [%]
		t	R ² [%]	t	R ² [%]		t	R ² [%]	t	R ² [%]	
1	Socioemotional Wealth	5.7	94.3	6.9	86.6	22	271.9	91.3	453.1	97.5	67
2	Agency Theory	2.0	55.7	0.9	8.3	-56	163.1	95.1	245.2	95.6	50
3	Social Capital	0.8	30.3	2.9	96.9	283	75.7	84.4	142.4	87.0	88
4	Family Influence scale	1.2	59.6	2.9	75.6	149	70.0	95.0	106.1	96.3	52
5	Familiness	0.8	53.8	1.1	34.8	30	31.4	83.4	61.8	95.7	97
6	Resource Based View	0.8	64.6	0.7	14.8	-18	46.8	93.3	76.1	96.7	63
7	Stewardship Theory	0.7	40.0	-0.6	10.8	-184	55.2	95.6	84.0	98.5	52
8	Human Capital	0.2	2.1	0.2	0.5	18	47.2	87.5	85.2	92.0	80
9	Institutional Theory	0.7	52.7	0.4	8.5	-40	22.3	84.6	43.1	93.5	93
10	Contingency Theory	0.6	42.3	0.9	25.3	55	39.6	93.0	62.2	91.7	57

It may be noted that there is a consistent increase in citation activity across theories and concepts. However, the changes in publication rate are not consistent. Agency Theory, Resources Based View, Stewardship Theory, and Institutional Theory have no takers among researchers while Socioemotional Wealth theory, Social Capital, Family Influence Scale, Familiness, Human Capital, and Contingency Theory have gained attention in the past five years.

Table 11: Theories or concepts in the greatest rate of increase in family business research - Publications.

Rank	Theory / Model	2011 - 2020		2016 - 2020		Change
		t	R ²	t	R ²	
1	Sustainable Family Business Theory	0.04	1.4%	0.3	45%	724%
2	Stakeholder Theory	0.13	7.2%	0.9	47.1%	575%
3	Organizational Identity Model	0.11	6.8%	0.5	36.7%	358%
4	Social Capital	0.76	30.3%	2.9	96.9%	283%
5	Family Embedded Theory	0.35	33.5%	1.1	58.2%	213%

It can be seen that Sustainable family Business Theory indicates the largest increase of 724%, as shown in Table 11. It can be assumed that Sustainable Family Business Theory, Stakeholder Theory, Organizational Identity Model, Social Capital, and Family Embedded Theory will receive even more attention in the future. However, the dominance of the Socioemotional Wealth theory cannot be neglected.

4 Discussions and Conclusion

This paper is based on a systematic literature search in the field of family business research, which was subsequently analyzed by bibliometric and scientometric methods. The analysis is limited to the data provided by Web of Science in the database 'Core Collection'. Basically, the title, author keywords, and abstract were used to determine the relevant publications and the theories and concepts used. A review of the full texts was not conducted. This limitation may lead to a bias of the results. A further study should be extended accordingly to include full papers. Another limitation is the focus on explicitly mentioning the theory or concepts in the title, author keywords, and abstract that were used for analysis. Implicitly used theory and concepts were accordingly not identified and should also be considered in a further study, as well.

The paper tries to give an overview of the publications in family business research and present its development in the past 10 years. It also aims to give a first estimation of the further development. The most significant theory, both in number of publications and number of citations, in family business research over the past 10 years is Gómez-Mejía's Socioemotional Wealth theory (Gómez-Mejía et al., 2007), which accounted for 20% (330 documents) of the 1,649 final identified documents with an explicit mention of a theory or model. Furthermore, the Agency Theory (Cordeiro et al., 2020; Schulze et al., 2001; Young et al., 2008), the Social Capital (Arregle et al., 2007; Pucci et al., 2020), the Family Influence Scale F-PEC (Habbershon et al., 2003; Stanley et al., 2019), the Familiness (Basco et al., 2019; Pearson et al., 2008) and the Resource Based View (Moreno-Gómez & Lafuente, 2019; Zahra et al., 2004) form significant theories and concepts.

Examining the change in publication and citation rates in the past five years to 10 years, a further increase in the importance of Socioemotional Wealth theory can be seen. Focusing on the period 2011-2020, an average of 5.7 publications per year were published with an explicit reference to Socioemotional Wealth theory. In the period 2016 - 2020, the publication rate increased to 6.9 publications per year (+22%). A significant increase in the publication rate concerning Sustainable Family Business Theory can be observed as well. The publication rate increased by 724%, which suggests that this approach has found resonance among scientists and more publications based on this theory can be expected in the future.

When analyzing the authors, it can be seen that more than 50% of the publications were either written alone or with another co-author. Out of the 7,246 authors, 18.1% have already published more than 50% of the papers. The most influential author in family business research is Chrisman James J., USA, from Mississippi State University with 71 publications and 7,097 citations. In total, Chrisman has 110 publications with 8,954 citations and an H-index of 46.

Majority of publications have been published by authors from USA with 27.3%, followed by Italy (10.6%), England (10.1%), Spain (8.8%), and P.R. China with 7.7%. An aggregation of the countries to continents is showing that the most productive continent is Europe with 48% of the publications.

Another finding is that 59.3% of the publications in the field of family business research were published in 10 journals with an average citation rate of 31.2 citations per document. The

most significant journal is Family Business Review with 345 publications and 18,008 citations. The US American Journals is ranked Q1 by Scimago and has an H-index of 105.

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