

## **THE FIELD OF FAMILY BUSINESS RESEARCH IN SOUTH AFRICA: A PRELIMINARY REVIEW**

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### **ABSTRACT**

As a field of study grows, it is important to regularly pause and reflect on the progress made as well as to evaluate the contributions of researchers. The purpose of this study was to establish the status of the field of family business in South Africa by reflecting on the “who, what, and how” of family business research in the country. This study involved undertaking a bibliometric analysis of journal articles published in the field of family business by South African scholars. The 48 publications which were analysed showed that five researchers from three institutions dominate the field. The articles were published in 21 different journals covering a variety of different topics. The results showed a preference for quantitative over qualitative research methods and that non-probability sampling dominates. By reflecting on and analysing the family business research done by South Africans, potential avenues for future research were identified and a consolidation of the discipline in the country was able to take place.

### **INTRODUCTION AND PROBLEM DEFINITION**

Family businesses account for the largest percentage of economic activities in most countries in the western world, dominating the economic landscape of most nations (Family Firm Institute, 2015; Yu, Lumpkin, Sorenson and Brigham, 2012: 33; Sharma, 2004: 3). Despite their importance and worldwide contributions, at the end of the 20<sup>th</sup> century, the field of family business as a separate field of study was only about 30 years old (Bird, Welsch, Astrachan and Pistrui, 2002: 337; Wortman, 1994). Over the years the number of journals publishing family business research, the number of published articles (Sharma, 2015: 7; Wilson, Whitmoyer, Pieper, Astrachan, Hair and Sarstedt, 2014: 6) and the number of doctoral dissertations published (Wilson *et al.*, 2014: 6) has increased significantly. Scholars have been attracted to the field because the “unique interaction between family and business” provides an interesting context for studying organisational phenomena (Xi, Kraus, Filser and Kellermans, 2015: 115). Furthermore, Gedajlovic, Carney, Chrisman and Kellermans (2012: 1011) note that “studying family firms can contribute important new insights to many of the issues and questions with which mainstream management scholars are currently grappling”.

As the field has grown, so too has the need to “systematically evaluate the contributions of researchers and universities to family business research, to show their mutual interconnections and assess the content of their work” (Zahra and Sharma, 2004: 332). According to Sharma (2004: 2), “as a field of study develops it is important to regularly pause and reflect on the progress made and to reflect on the directions to pursue in future so that deeper insights can be gained into a phenomenon of interest”. Evaluations of this kind for the field as a whole have been conducted by several authors (Benavides-Velasco, Quintana-Garcia and Guzman-Parra, 2013; Chrisman, Chua, Kellermans, Matherne and

Debicki, 2009; Zahra and Sharma, 2004) but to date, no such reflections have been undertaken on the field of family business research in South Africa. By reflecting on and analysing the family business research done in South Africa, potential avenues for future research can be identified and a consolidation of the discipline in the country can occur.

Given the importance of family businesses to the South African economy, it is also vital that the challenges facing these businesses are identified and researched. If the field of family business in South Africa seeks to keep pace with the field internationally, the research undertakings, contributions and publication activity of South African researchers needs to be reviewed, first to assess whether the challenges facing family businesses in South Africa are being researched and second, that their research activities are in line with their international counterparts.

Although a lack of consensus on an exact definition of a family business exists an operational definition generally used among South African researchers defines a family business as a business where at least two family members are actively involved in the management of the business, and where a single family owns more than 50 per cent of the shares in the business.

## **PURPOSE AND PRIMARY OBJECTIVE**

The purpose of this study is to establish the status of the field of family business research in South Africa. As such, this study will reflect on the field by investigating the “who, what, and how” of research on family business in the country. More specifically the primary objective is to evaluate the field of family business research in South Africa in terms of who the researchers are, what topics are under study, the methods used to carry out such research, and the contributions being made.

## **THE FIELD OF FAMILY BUSINESS RESEARCH**

The field of family business has evolved significantly over the last 30 years. This evolution is described below in terms of publication activities, the nature of scholars being attracted to the field, the theories and topics investigated, and the methodologies adopted.

### **Early beginnings of the field of family business**

Family businesses have been in existence and operating for centuries. Despite this they have only been of interest to researchers since the 1980's; prior to that they were largely ignored (Benavides-Velasco *et al.*, 2013: 41; Bird *et al.*, 2002: 337). The appearance of a special issue of *Organisational Dynamics* in 1983 triggered interest in research on family businesses (Melin, Nordqvist and Sharma, 2014: 2). This special issue broadened awareness of the topic in the research community, and provided ideas for future research (Wilson *et al.*, 2014: 7). Not long after this issue (October 1984), several scholars got together to “discuss the possibility of creating a new field that would stimulate research in family business” (Lansberg, 2001 cited in Sharma, Chrisman and Gersick, 2012: 6). From this meeting, the Family Firm Institute (FFI) was born in 1986, and the Family Business Review (FBR) in 1988 (Astrachan, 2008 cited in Sharma *et al.*, 2012: 6). The FBR was the first journal devoted specifically to family business research (Melin *et al.*, 2014: 2; Bird *et al.*, 2002: 340). Prior to the FFI and the FBR, there was almost complete neglect of family business in management research (Sharma *et al.*, 2012: 7).

### **Journals and publication in the field of family business**

Family business research has evolved dramatically over the last three decades (Wilson *et al.*, 2014: 4) and the field currently hosts three academic peer-reviewed journals dedicated to this particular field of study (Xi *et al.*, 2015: 114): Family Business Review, 1988 (Publisher: Sage), Journal of Family Business Strategy, 2010 (Publisher: Elsevier), and Journal of Family Business Management, 2011 (Publisher: Emerald). More recently the International Journal of Family Business and Regional Development (Publisher: InderScience) has also been added to the fold. Although the FBR is the

preferred publication outlet for family business research, family business articles are published much more broadly today, regularly appearing in top-tier entrepreneurship, strategy, management and finance journals (Sharma, 2015: 5; Xi *et al.*, 2015: 114). Examples of these journals are Entrepreneurship Theory and Practice (ET&P), The Journal of Business Venturing (JBV), Journal of Small Business Management (JSBM), Academy of Management Journal, Organisational Science, Journal of Management Studies, Journal of Management and Administrative Science Quarterly. Family business articles are, however, mostly published in journals that specialise in family business or entrepreneurship and small business, particularly FBR, ET&P, JBV and JSBM (Debicki, Matherne, Kellermanns and Chrisman, 2009: 159).

Over the last 30 years there has been a noticeable increase in the number of journals publishing family business research, as well as an increase in the total number of published articles (Wilson *et al.*, 2014: 6). The growth in publications is demonstrated by a search done of peer-reviewed articles using the term 'family business' in the ABI Inform Global. "While there were only 111 articles on family business before 1 January 1970, the decade of the 1970s added 135, and the 1980s added another 306 articles to a growing body of literature. The number of articles written accelerated in the 1990s as 2 281 articles appeared in peer-reviewed journals, and 5 646 more were added in the first decade of this century (2000s), with 4 021 new family business articles finding their way into this database during the period 2010 to 2014" (Sharma, 2015: 5). The increased interest in family business research is also shown in the number of doctoral dissertations that have been published. Doctoral dissertations increased from a total of 28 during the period 1988 to 2002 (15 years), to 71 during the period 2003 to 2011 (9 years) (Wilson *et al.*, 2014: 6).

### **Scholars in the field of family business**

"Pioneers in the field of family business were scholars who initially consulted for family business managers on the challenges they faced" (Wortman, 1994; Handler, 1989). What existed was essentially "a fragmented anecdotally focused body of knowledge in need of increased methodological rigor" (Handler, 1989). Almost all these original scholars had affiliations with both universities and consulting practices (Sharma *et al.*, 2012: 8). Until the mid-1980s, there remained only by a few authors in the field, but the next ten years saw a rapid increase in the "number of scholars from various disciplines being attracted to the field" (Casillas and Aceda, 2007: 151; Zahra and Sharma, 2004: 334) and these numbers have continued to increase ever since (Zahra and Sharma, 2004: 334).

Today the field attracts a diverse global base of researchers (Xi *et al.*, 2015: 114; Wilson *et al.*, 2014: 6; Litz, Pearson and Litchfield, 2012: 19). In 2014, SAGE reported that the FBR was distributed to 9 599 subscribers in 187 countries (Sharma, 2015:5). However, productivity in terms of family business publications shows that the United States, Canada, the United Kingdom and Spain are the top contributors (Benavides-Velasco *et al.*, 2013: 44). Family business scholars are also associated with a variety of institutions with University of Alberta (Canada), Mississippi State University, University of Calgary, Jonkoping business school (Sweden) and Kennesaw State University being the top-ranked institutions in terms of family business publications (Debicki *et al.*, 2009: 155). As with the scholars themselves, relationship between the top-rated universities seem to exist (Debicki *et al.*, 2009: 154).

### **Theories, topics and units of analysis in the field of family business**

In addition to scholars from various institutions and countries, the field attracts scholars from a variety of disciplinary backgrounds, theoretical perspectives, and methodological orientations (Melin *et al.*, 2014: 1). "Since its inception, the field of family business has borrowed heavily from other disciplines, including Psychology, Sociology, Economics, Law and Family systems theories" (Bird *et al.*, 2002: 338; Wortman, 1994: 4). As a result many theories have been applied to the field of family business over the years (Wilson *et al.*, 2014: 11; Yu *et al.*, 2012: 44; Chua, Chrisman and Steier, 2003: 334; Chrisman, Chua and Sharma, 2003: 6, 21). Two theories have, however, "dominated the discourse", namely agency theory and the resource-based view (Chrisman, Kellermanns, Chan and

Liano, 2010 cited in Sharma *et al.*, 2012: 11). Most research today is still “grounded in well-established theories drawn from other disciplines” (Casillas and Aceda, 2007: 142; Zahra and Sharma, 2004: 336).

The topics of family business studies have also progressed over time. Until the mid-1980s, the focus was mainly on succession issues (Sharma *et al.*, 2012: 10; Casillas and Aceda, 2007: 151; Zahra and Sharma, 2004: 334) which had mostly practical applications for family business stakeholders (Wilson *et al.*, 2014: 8). During the late 1980s and early 1990s a focus on defining a ‘family business’ also emerged (Melin *et al.*, 2014: 2). Although succession remained a dominant theme, the period 1996 to 2003 saw a variety of other topics getting research attention (Zahra and Sharma, 2004: 334; Chrisman *et al.*, 2003). In fact, from the very early days, family business researchers have explored a variety of different topics. A short list would be: interpersonal family and business dynamics, conflict, firm performance, governance, professionalisation, internationalisation, innovation, consulting for family firms, gender and ethnicity (Wilson *et al.*, 2014: 8; Sharma *et al.*, 2012: 10), resources and competitive advantage, entrepreneurship and innovation, leadership, and strategic planning (Chrisman *et al.*, 2003). In a review of all publications prior to 2012 (Xi *et al.*, 2015: 127), five topical clusters were identified, providing a substantial perspective of research in the field. They were: component and behavioural defining approaches (cluster 1), governance (cluster 2), competitive advantage (cluster 3), leadership and management (cluster 4), and succession (cluster 5). Although “succession remains a defining feature of the field, it no longer holds the research prominence it once had” (Yu *et al.*, 2012: 45).

Regarding the focus of family business studies, the prime interest in the early years was on SMEs (Davis, 1982 cited in Sharma *et al.*, 2012: 9). “While research in the late 1980s and 1990s continued to focus on family businesses of this size, by the late 1990s scholars had started to become aware of the influence of these systems on the behaviour and performance of many of the largest private and publicly held firms in the world” (Sharma *et al.*, 2012: 9). In the first ten years of this century, researchers have focussed on both privately controlled and publicly held family businesses. In the early years (1980s) the field had a balanced focus on both business and family-related variables (Sharma *et al.*, 2012: 10). Since then, most family business studies have been slanted towards a focus on the business rather than on the family system (Melin *et al.*, 2014: 4; Sharma *et al.*, 2012: 10).

### **Methodologies adopted in the field of family business**

From its origins as a conceptual topic, the field has also developed methodologically over the past 30 years (Wilson *et al.*, 2014: 7). Prior to 1983, researchers almost exclusively used qualitative method to address issues of interest (Wilson *et al.*, 2014: 8). In the 1980s and early 1990s research “remained shallow in terms of systematic analysis and theoretical rigour” (Sharma *et al.*, 2012: 11; Zahra and Sharma, 2004: 334). During this period there was an over-use of case studies and too much research based on in-depth interviews. Sample sizes tended to be small, measurement aspects were questionable (Wilson *et al.*, 2014: 11; Bird *et al.*, 2002: 338), and even relatively simple techniques were seldom used to report simple relationships. Building on these earlier efforts, rigorous empirical studies began to emerge in the late 1980s and mid-1990s (Wilson *et al.*, 2014: 8; Zahra and Sharma, 2004: 334). By the late 1990s quantitative studies employed more “rigour, larger samples and sophisticated analytical tools”, and this trend has continued ever since (Wilson *et al.*, 2014: 7; Benavides-Velasco *et al.*, 2013: 46; Sharma *et al.*, 2012: 11). The mid-1990s appear to have been a transitioning point, where primarily qualitative research began to give way to primarily quantitative research (Wilson *et al.*, 2014: 9). However, in the early 2000s studies using quantitative data and regression analysis were most common, and although the period was characterised “by an increase in scientific rigour, it gave published research a mechanical quality that did not help understand the forces underlying empirical observations” (Zahra and Sharma, 2004: 336).

The use of more advanced methods has increased steadily over the past 30 years, but the most progress in terms of methodologies has occurred during the past five years. There have been substantial changes in the analytical and statistical methods used by researchers in their increasingly

complex studies (Wilson *et al.*, 2014: 9). These changes include “larger sample sizes and therefore greater statistical power, more systematic and fewer convenience samples, more independent and dependent variables, and more use of multivariate statistical tools” (Wilson *et al.*, 2014: 5). For example, simple regression and correlations have decreased considerably in the past five years compared to prior periods, and more advanced techniques such as multiple regression analysis and structural equation models are increasingly being used (Wilson *et al.*, 2014: 7). Although the field is now dominated by quantitative studies, it attracts and enjoys a diversity of methodological perspectives that help to deepen the understanding of family businesses. While cross-sectional studies have been the most frequently employed methods, longitudinal studies are beginning to emerge. An increase in variety of data collection and analytical methods are also being witnessed, including “archival methods, matched paired samples, simulations, content analysis, interpretative approach, narrative analysis, experimental design” and so forth (Melin *et al.*, 2014: 14; Sharma *et al.*, 2012: 11). “Family business research has come a long way in the past 25 to 30 years with regard to enhancing scientific rigour” (Sharma *et al.*, 2012: 11).

Although research in the field of family business was slow in getting underway and in accumulating a body of knowledge (Xi *et al.*, 2015: 114; Gedajlovic *et al.*, 2012: 1010), “interest in the field has grown significantly in recent years, leading to a fresh and emerging field of study in business research” (Xi *et al.*, 2015: 114; Benavides-Velasco *et al.*, 2013: 54; Yu *et al.*, 2012: 44; Litz *et al.*, 2012: 17; Gedajlovic *et al.*, 2012: 1010; Kraus, Harms and Fink, 2011: 33; Gomez-Mejia, Cruz, Berrone and De Castro, 2011: 695). This increased interest has resulted in a “dramatic increase in family business studies and a rapid accumulation of new knowledge about the family business domain” (Sharma, 2004 cited in Yu *et al.*, 2012). Today the field has grown from humble beginnings to a “substantial conceptual and theoretical body of knowledge” (Sonfield and Lussier, 2004: 189).

## RESEARCH METHODOLOGY

This study involves a quantitative analysis of academic publications and is descriptive in nature. More specifically a bibliometric analysis was undertaken. Archumbault and Gagné (2004: 2) describe bibliometrics as a method for conducting the quantitative analysis of a science which serves to measure aspects of research results in published form. Bibliometrics is useful for demonstrating the impact of research as well as for identifying research strengths and weaknesses, top performing journals and top researchers in a subject area (University of Leeds, 2014: 2). One form of bibliometrics analyses articles which are published in academic journals over a specific period of time. In this study a bibliometric analysis of all publications in the field of family business by South African scholars was undertaken. Bibliometrics involve measures of output (number of publications) or indicators of impact (citation counts). The analysis in the study focused on scholarly output, as such measuring productivity rather than impact. The practice of assessing research performance by using bibliometric indicators is abundant in academic research (Diem and Wolter, 2013: 87) and is “becoming increasingly important as a way to measure and assess the research impact of individuals, groups of individuals or institutions” (University of Leeds, 2014: 2).

Two criteria were laid down for published journal articles to be included in the sample for this study, namely that the publication must be based on research undertaken on family businesses operating in South Africa, and that the publication must be written by a South African author/s. The journal publications meeting these criteria were collected via online database searches and the following research protocol was followed:

- Several key combinations of words were identified for use when undertaking the online database search; these included various combinations such as ‘family business South Africa’, ‘family firms South Africa’, ‘family-owned business South Africa’ and ‘family business research South Africa’.
- These key combinations of words were used to search several databases, including Google Scholar and EBSCO Host, as well as the databases of Sage and Emerald. Databases of South African journals such as Management Dynamics, South African Journal of Business Management and Journal of Contemporary Management were also searched.

- References (citations) in publications identified were further examined to identify additional publications which could be included in the analysis.
- Known South African family business researchers were contacted via email and requested to provide details of articles that they had published in the field of family business.
- The abovementioned process continued until a saturation point was reached and no new journal publications meeting the specific criteria were identified.
- The publications were downloaded and data from the publications that met the criteria was captured on an Excel spread sheet.
- Specific data captured for analysis included: author/s, institution with which affiliated, title, date published, journal in which published, the current impact factor of the journal and whether it was accredited or not, the number of citations, the paradigm, the methodology/sampling methods adopted, the sample size, the topic under study and the underlying theory used. It is this data collected which was subjected to analysis in this study.
- To ensure the credibility and objectivity of the data, two researchers were involved with the capturing and categorising process. Where disagreements and discrepancies arose, the opinions of a third researcher were solicited.

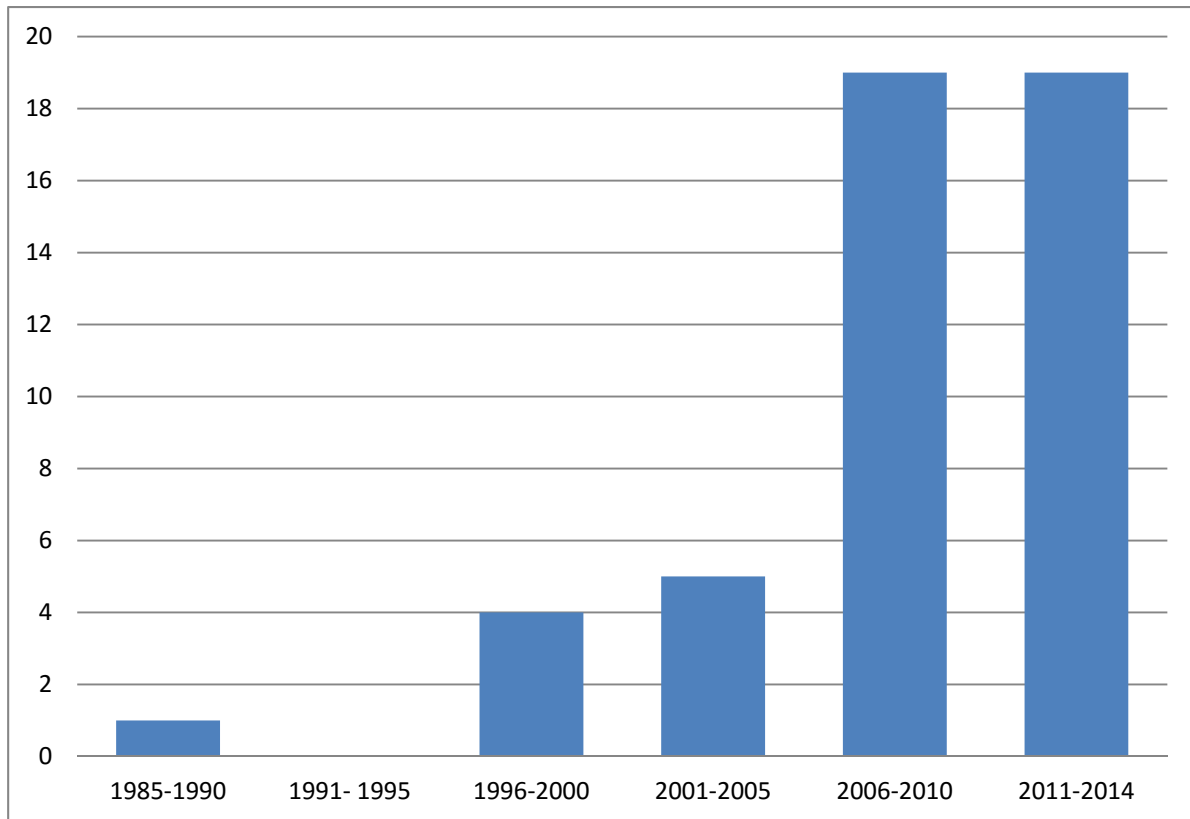
In total, 48 published journal articles on family business authored by South Africans scholars were identified on which to undertake the bibliometric analysis in this study.

## **EMPIRICAL RESULTS**

### **Publication activity**

The articles identified as authored by South Africans and analysed in this study were published over the period 1985 to 2014 (see Figure 1). The first publication appeared in 1985 and the most recent in 2014.

**FIGURE 1  
PUBLICATION ACTIVITY**



Only one article was published during the period 1985 to 1990. This article was published in 1985 by S Jithoo from the University of Durban-Westville (now the University of KwaZulu-Natal). The article was of a qualitative conceptual nature and was titled “Indian Family Businesses in Durban, South Africa”. The article was published in the *Journal of Comparative Studies*. None of the articles under review were published during the period 1991 to 1995. The period 1996 to 2000 saw an increase in publication rate with four articles published during this period. This trend continued during the period 2001 to 2005, which saw another five articles published. The period 2006 to 2010 however, saw a vast increase in the number of articles published, with 19 published during this period. The same number of articles (19) was also published during the period 2011 to 2014.

### **South African family business scholars**

The findings show that 25 South Africans have published in the field of family business. These authors come from nine different South African academic institutions and one private sector organisation. In order to determine the productivity of the authors identified, each article was weighted as per the Department of Higher Education and Training (DHET) subsidy weightings, namely one article or output generating one unit. This unit has been shared by the authors whose names appeared on the article. In terms of weighted research publications outputs, the most productive South African family business authors are SP van der Merwe (North-West University), E Venter (NMMU), C Boshoff (Stellenbosch University), SM Farrington (NMMU) and C Adendorff (NMMU) (see Table 1). Only eight South African authors have generated more than one output unit and the top five researchers have generated 70 per cent of the outputs (units).

In analysing the author's productivity it is evident that several collaborations have occurred. Collaborations refer to the number of times the authors have worked together on a team with or without other authors. Authors who collaborated the most were Venter and Boshoff, who worked on 15 articles together. This was followed by Venter and Farrington with 13 collaborations, and Farrington and Boshoff with seven collaborations. The three authors who most frequently collaborated were Farrington, Venter and Boshoff, together these authors published seven articles. Boshoff and Venter have also collaborated with other scholars, both having collaborated separately with eight different scholars. Morris was the South African scholar who collaborated most with overseas-based authors, having worked together with international researchers on two articles. S Kruger (University of Johannesburg) was the only academic who collaborated with someone from industry, namely WP Venter (Allied Electronics).

**TABLE 1**  
**FAMILY BUSINESS SCHOLARS, INSTITUTIONS AND WEIGHTED OUTPUTS**

	<b>Author</b>	<b>Institution</b>	<b>Weighted outputs</b>
1	SP van der Merwe	North-West University	9.83
2	E Venter	Nelson Mandela Metropolitan University	8.07
3	HC Boshoff	Stellenbosch University	5.83
4	SM Farrington	Nelson Mandela Metropolitan University	5.75
5	C Adendorff	Nelson Mandela Metropolitan University	3.91
6	G Maas	Nelson Mandela Metropolitan University	1.33
7	S Jithoo	University of Durban-Westville	1.00
8	L van Scheers	University of South Africa	1.00
9	SM Ellis	North-West University	0.83
10	WP Venter	Allied Electronics	0.83
11	S Kruger	University of Johannesburg	0.83
12	C Eybers	Nelson Mandela Metropolitan University	0.75
13	GD Sharp	Nelson Mandela Metropolitan University	0.67
14	MH Morris	University of Cape Town	0.58
15	V Padayachee	University of Natal	0.50
16	T Visser	University of South Africa	0.50
17	E Chiloane-Tsoka	University of South Africa	0.50
18	A Kritzinger	North-West University	0.50
19	J Vorster	North-West University	0.50
20	JP van der Westhuizen	Vaal University of Technology	0.50
21	A Garnett	North-West University	0.50
22	D Nell	University of Cape Town	0.33
23	FJ Herbst	Stellenbosch University	0.33
24	P Court	Rhodes University	0.25
25	S Radloff	Rhodes University	0.25
	<b>Total outputs (units)</b>		<b>45.87*</b>

\* The outstanding units were generated by foreign authors



## Institutions

In order to determine the productivity of the institutions identified, as in the case of scholars, each output was weighted as one article generating one unit. This unit was shared between the institutions associated with the scholars whose names appear on the article. A list of institutions and their corresponding weighted output is summarised in Table 2 where it can be seen that the most productive South African institution is the Nelson Mandela Metropolitan University (NMMU), which has generated 46 per cent of outputs (units).

**TABLE 2**  
**INSTITUTIONS AND WEIGHTED OUTPUTS**

	<b>Institution</b>	<b>Weighted outputs</b>
1	Nelson Mandela Metropolitan University	20.48
2	North-West University	12.16
3	Stellenbosch University	6.16
4	University of South Africa	2.00
5	University of Durban-Westville	1.00
6	University of Cape Town	0.91
7	Allied Electronics	0.83
8	University of Johannesburg	0.83
9	University of Natal	0.50
10	Vaal University of Technology	0.50
11	Rhodes University	0.50
	<b>Total outputs by South African institutions</b>	<b>45.87*</b>

\* The outstanding units were generated by foreign authors

Over the last 20 years NMMU has generated 20.48 output units, or almost 21 articles. This is not surprising given that three of the top five most productive authors hail from NMMU, namely E Venter, SM Farrington and C Adendorff. NMMU is followed by the North-West University with 12.16 generated output units. The most productive family business scholar, SP Van der Merwe, is associated with this university. In third position is Stellenbosch University with 6.16 generated output units. This can be attributed to the fact that the third most productive author, CH Boshoff is associated with this institution.

In the following table (Table 3), it can be seen that authors from NMMU have appeared as the first, second or third author, most often (56 times), followed by the University of the North-West (18 times) and Stellenbosch University (16 times). These three institutions are the only three institutions which have generated more than five output units (see Table 2) on family business. In total the names of South African authors have appeared on publications 110 times.

**TABLE 3**  
**SOUTH AFRICAN INSTITUTIONS, AUTHOR POSITIONS AND TOTAL OUTPUTS**

<b>Institutions</b>	<b>1st author</b>	<b>2nd author</b>	<b>3rd author</b>	<b>4th author</b>	<b>TOTAL</b>
Nelson Mandela Metropolitan University	27	18	11	0	56
North-West University	12	4	2	0	18
Stellenbosch University	0	7	6	3	16
International university	1	1	2	1	5
University of Cape Town	2	0	1	0	3
University of Durban	2	1	0	0	3
University of South Africa	2	1	0	0	3
University of Johannesburg	0	2	0	0	2
Rhodes University	0	0	1	1	2
Vaal University of Technology	1	0	0	0	1
Company / Industry	1	0	0	0	1
<b>Total</b>	<b>48</b>	<b>34</b>	<b>23</b>	<b>5</b>	<b>110</b>

### **Journals**

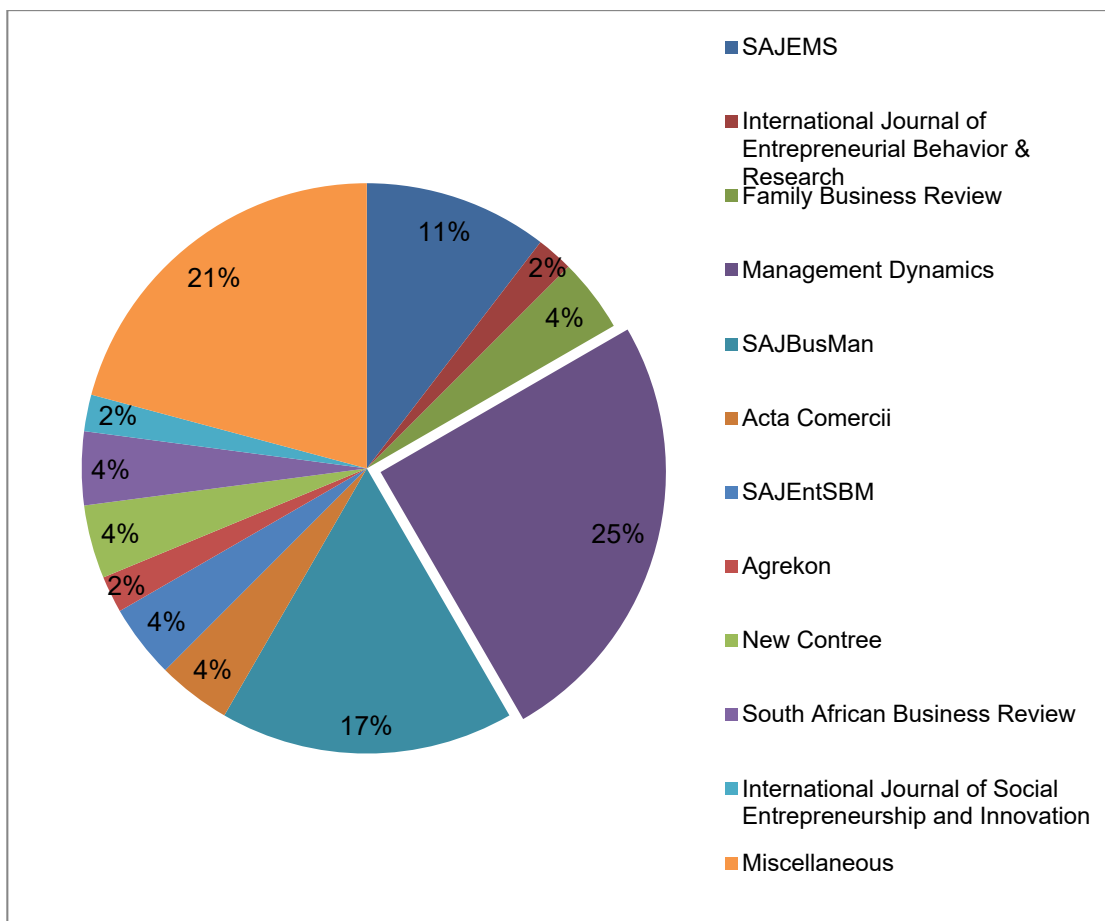
The 48 articles published by South African authors were published in 21 different journals. The average impact factor of these journals is 0.395. It should be noted that the current impact factor of these journals is not necessarily the same as the impact factor at the time of publication. The five journals with the highest number of articles published, their current impact factor and accreditation level is tabled below (see Table 4).

**TABLE 4**  
**ACADEMIC JOURNALS WITH THE HIGHEST NUMBER OF PUBLICATIONS**

Journal	Articles	2015 impact factor	Accreditation
Management Dynamics	12	0.00	IBSS
South African Journal of Business Management	8	0.200	ISI
South African Journal of Economic and Management Sciences	5	0.162	ISI
Family Business Review	2	5.528	ISI
South African Business Review	2	0.00	DHET

The various journals in which South African family business articles have been published are depicted below (see Figure 2). Nine of the journals (43%) are South African-based. The journal in which the highest number of articles has been published is Management Dynamics (12 articles), followed by the South African Journal of Business Management (8 articles), the South African Journal of Economic and Management Sciences (5 articles), Family Business Review (2 articles) and the South African Business Review (2 articles).

**FIGURE 2**  
**JOURNALS**

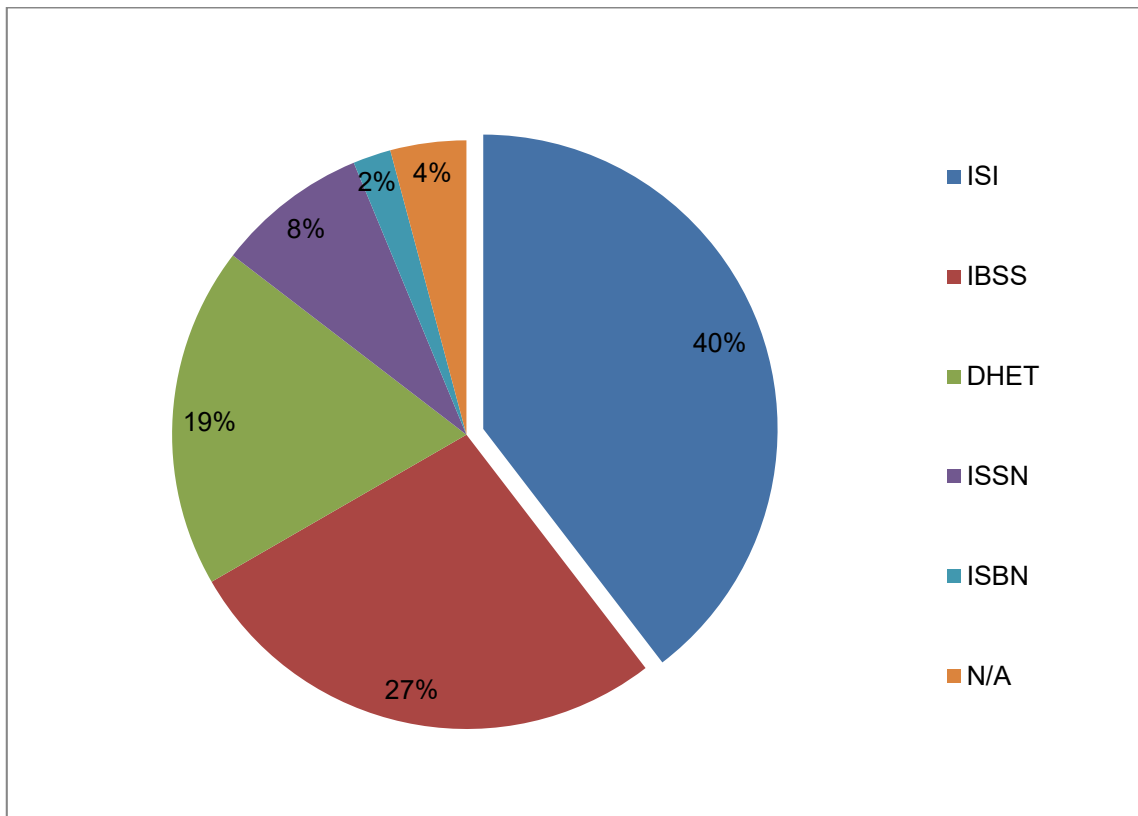


Management Dynamics has the highest number of publications but currently has no impact factor. The Family Business Review has the highest impact factor (5.528), but only two articles have been

published in this journal. The majority of South African articles (73%) are published in South African journals. Only three of the South African journals have impact factors, namely the South African Journal of Business Management (0.200), the South African Journal of Economic and Management Sciences (0.162) and Agrekon (0.182).

From Figure 3 it can be seen that the majority (40%) of journals in which South African family business authors publish are accredited with the Institute for Scientific Information (ISI), with 27 per cent accredited by the International Bibliography of the Social Sciences (IBSS). In total, 19 per cent of the journals in which South African family business articles are published are accredited by the DHET. Only four per cent of the articles under study are not accredited.

**FIGURE 3**  
**JOURNAL ACCREDITATION**



### Citations

In total, the 48 articles report an average of 26.457 citations per article. From Table 5 it can be seen that the article with the most citations (584) was published in 1997 by MH Morris, R Williams, JA Allen, and RA Avila, and was titled “Correlates of success in family business transitions”. This article was published in the Journal of Business Venturing. The second most cited article, with 233 citations, was published in 2005 and authored by E Venter, HC Boshoff, and G Maas. This article was titled “The influence of successor-related factors on the succession process in small and medium-sized family businesses” and was published in the Family Business Review.

**TABLE 5**  
**PUBLICATIONS WITH THE HIGHEST NUMBER OF CITATIONS**

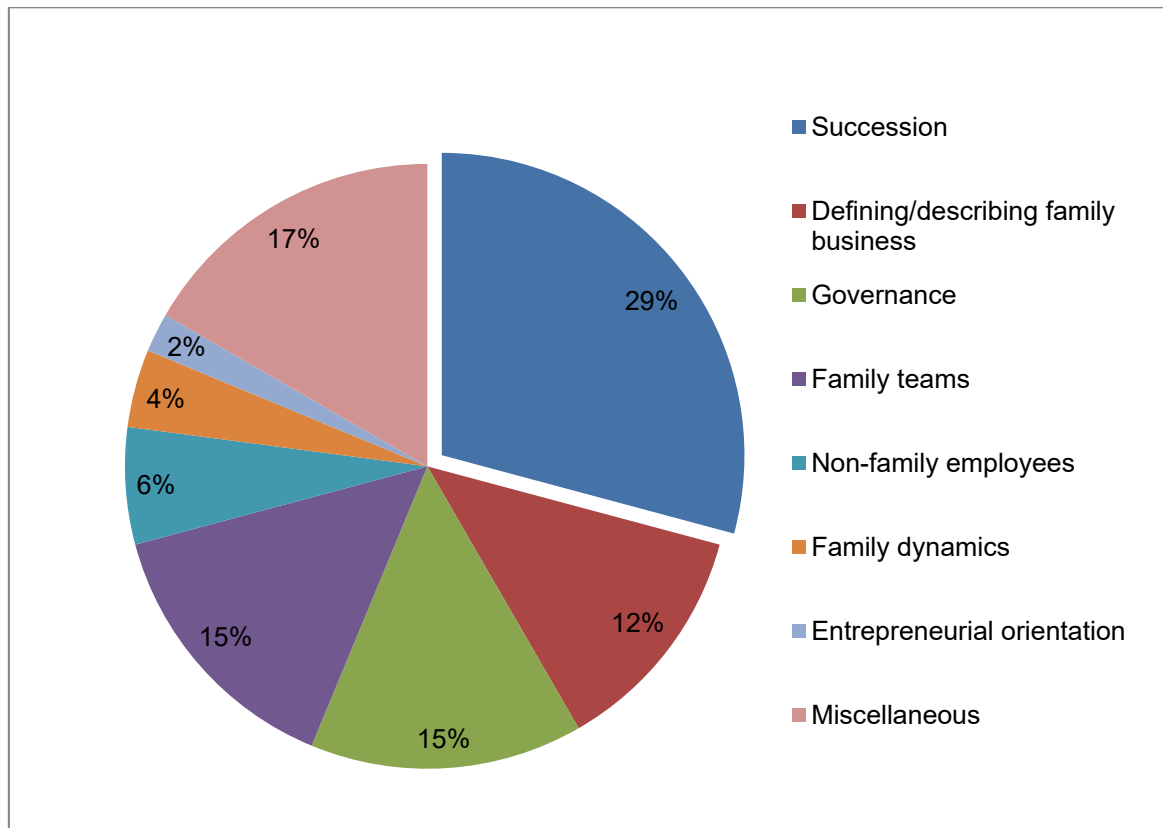
Author name	Journal	Title	Year	Citations
MH Morris, R Williams, JA Allen and RA Avila	Journal of Business Venturing	Correlates of success in family business transitions	1997	583
E Venter, C Boshoff and G Maas	Family Business Review	The influence of successor-related factors on the succession process in small and medium-sized family businesses	2005	233
MH Morris R Williams and D Nell	International Journal of Entrepreneurial Behavior and Research	Factors influencing family business succession	1996	166
K Hart and V Padayachee	Comparative Studies in Society and History	Indian business in South Africa after apartheid: New and old trajectories	2000	40
E Venter C Boshoff and G Maas	South African Journal of Business Management	The influence of relational factors on successful succession in family businesses: A comparative study of owner-managers and successors	2003	34

The results of this study show the highest number of citations for an article being 583, and the lowest being none. It is interesting to note that the article with the most citations also has the highest number of international authors (3) and is published in the academic journal with the second highest impact factor (Journal of Business Venturing; current impact factor of 3.625). The articles with the lowest citations (0) are all published in academic journals with current impact factors of less than 0.2, most of which are South African journals. However, the relationship between an article and the impact factor of the journal in which it is published, is not indicative of the number of citations, as the two articles published in the journal with the highest impact factor (Family Business Review; current impact factor of 5.528), report citations of 233 and nine respectively.

### Topics and theories

The majority of articles published (see Figure 4) focus on the topic of succession (29%), followed by defining/describing family businesses (17%) and governance (15%). Other topics addressed include family teams (15%), non-family employees (6%), family dynamics (4%) and entrepreneurial orientation (2%). A variety of other topics have also appeared about which one article has been published; these include estate and retirement planning, familiness, family business values, non-financial goals, family harmony, business challenges, leadership and women in family business. Of the 48 articles published none showed the clear use of any particular theory.

**FIGURE 4  
TOPICS COVERED**

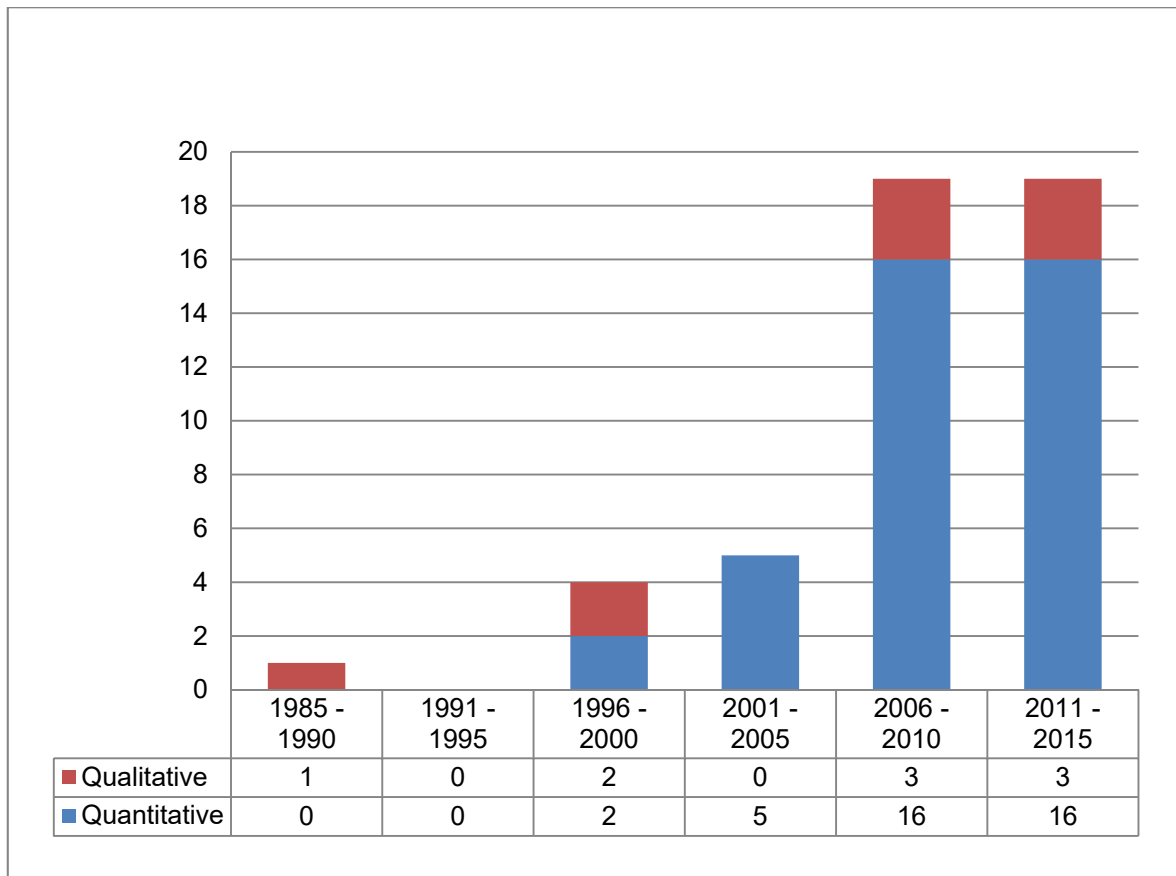


### **Methodologies adopted**

The research methodologies adopted by South African family business scholars (see Figure 5) during the period 1985 to 2014 show an overwhelming preference for quantitative methods over qualitative methods. The vast majority (81%) of the articles reported using quantitative methods with only 19 per cent adopting qualitative methods.

From Figure 5 it can be seen that the first article published in 1985 adopted a qualitative method. From 1996 to 2000, an even number of articles adopting both qualitative and quantitative methods. For the 2001 to 2005 period, only quantitative methods were adopted, whereas during the years 2006 to 2010 a vast increase in the number of quantitative methods occurred, while qualitative methods remained low. Between the years 2011 to 2015, quantitative methods were once again predominantly used, with the ratio of quantitative to qualitative methods used matching the ratio for the period 2006 to 2010.

**FIGURE 5  
 METHODOLOGIES ADOPTED**



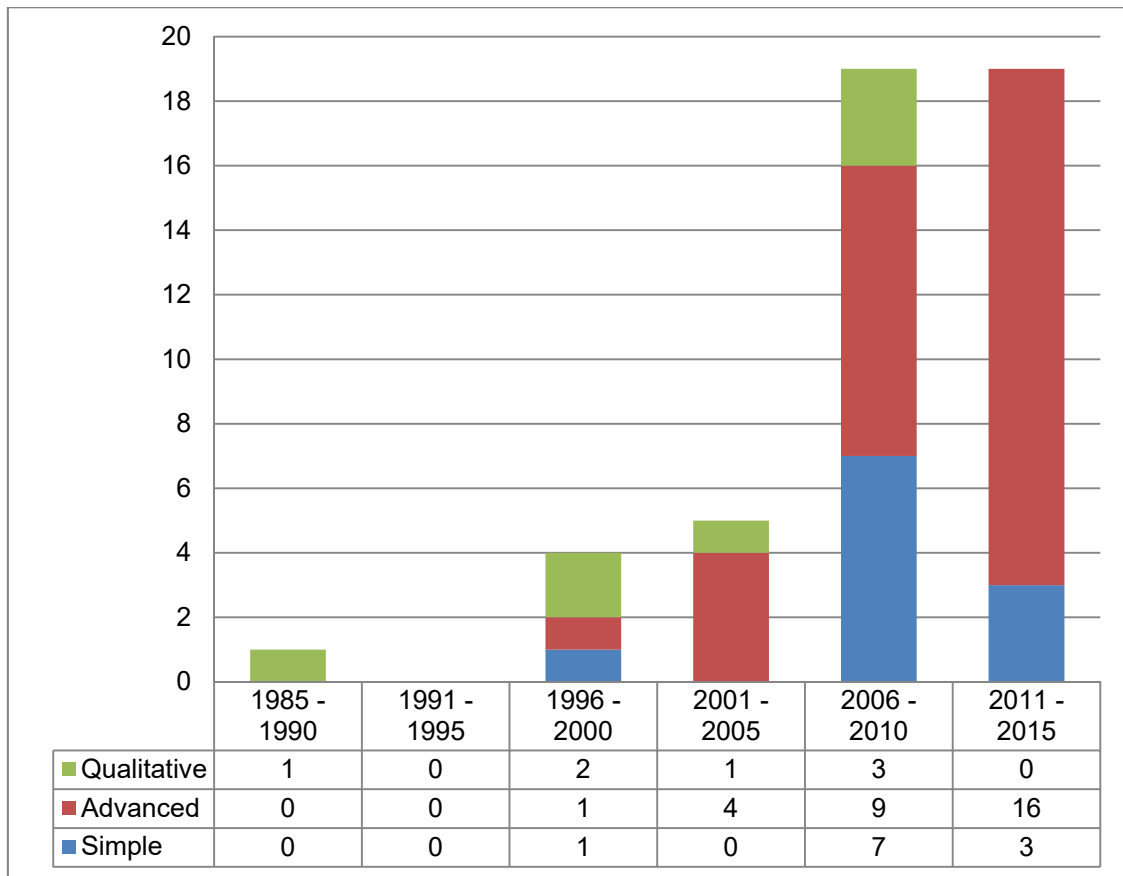
### Sampling and statistical analysis techniques

The sampling method adopted by the vast majority of South African family business scholars is non-probability sampling (77%). This method includes convenience, judgemental and snowball sampling. Only two per cent of the articles adopted random sampling (probability sampling). Of the 48 articles under review in this study, only 38 reported the size of their sample. The average sample size for quantitative studies was 348, the largest being 931 respondents, and the lowest being 102 respondents.

The majority (62%) of South African family business articles showed the use of advanced techniques to analyse the data, whereas 17 per cent showed the use of simple methods. Advanced methods of analysis included at least multiple regression analysis or structural equation modelling, whereas simple methods of analysis included mainly descriptive statistics. The 21 per cent where no statistical technique is mentioned refer to the qualitative articles under review.

From Figure 6 it can be seen that the first quantitative articles appeared in the years 1996 to 2000. One of these articles adopted more advanced statistical techniques, whereas the other adopted simple techniques. The period 2001 to 2005 saw an increase in the use of advanced techniques, with all articles published during this period adopting more advanced statistical analysis. The period 2006 to 2010 saw both advanced and simple techniques being used, whereas the period 2011 to 2015 saw advanced methods dominate.

**FIGURE 6**  
**STATISTICAL ANALYSIS TECHNIQUES**



## DISCUSSION OF FINDINGS

The primary objective of this study was to evaluate the field of family business research in South Africa in terms of who the researchers are, what topics are under study, the methods used to carry out such research and the contributions being made.

The empirical results show that the articles authored by South Africans were published over the period 1985 to 2014. Given that the first article was published in 1985 and the next only 10 years later, the field of family business research in South African can be said to be only about 20 years old. Initially publication numbers remained low but the years 2006 to 2010 saw a vast increase in the number of articles published, which stayed at this high level during the 2011 to 2014 period. This slow start in the number of articles published followed by a rapid increase bears similarity to the development of the field as a whole, which started in the 1970s with only a few publications (Wortman, 1994: 3; Handler, 1989: 257) and rapidly increased over the years 2005 to 2015 (Sharma, 2015: 4; Yu *et al.*, 2012:33; Litz *et al.*, 2012: 16). A possible explanation for the rapid increase during the years 2006 to 2014 could be the doctoral theses of Venter (2003) and Farrington (2009) which led to several articles being published in the years that followed. Publication activity among South African authors however, is low. The ABI Inform Global database contains more than 12 500 articles relating to family business (Sharma, 2015: 112). This study only identified 48 as being written by South African authors. To increase publication activity among South African authors, more university resources should be dedicated to family business research, increased efforts should be made to attract masters and doctoral students to family business studies, and family business researchers should focus on family business research only.



An analysis of the articles under review shows that 25 South Africans have published in the field of family business. These authors come from nine different South African academic institutions and one private sector organisation. Five researchers from three institutions dominate the field, generating 70 per cent of the outputs. This is consistent with the field as a whole, which according to Litz *et al.* (2012: 17), “has been dominated by a relatively small number of scholars who appear to be connected in terms of backgrounds, institutional affiliations, and interests”. The most productive South African family business authors are van der Merwe (North-West University), Venter (NMMU), Boshoff (Stellenbosch University), Farrington (NMMU) and Adendorff (NMMU). These researchers have collaborated several times with each other, contributing to their productivity. As is the case with international researchers, the aforementioned researchers are connected through supervisory relationships or mutual projects. The findings of this study appear to confirm Wilson *et al.*'s (2014: 12) contention “that instead of working in isolated teams ‘chasing statistical significance’, the community of family business researchers should work toward joining forces and collaborate in establishing a wealth of evidence for certain findings”. National research projects on selected topics could be an approach to increasing collaboration by family business researchers as well as raising the awareness of the field of study.

The institution in South Africa with the greatest number of publications on family business is NMMU, which has over the 30 year period of the sample of this study, published 51 per cent of the articles analysed. This can be attributed to the fact that of the five most prolific authors, three hail from NMMU, namely Venter, Farrington and Adendorff. NMMU is also the headquarters of the NMMU Family Business Unit, which serves as a hub for family firm research and consultations. Research shows that many of the most prolific universities have established family business centres and that many of the most productive researchers are based at universities hosting such infrastructures (Debicki *et al.*, 2009: 160). Such research centres “appear to have a reinforcing effect on family business research and help facilitate collaborations within a university” (Boardman and Corley, 2008: 912). It was also found that authors from NMMU have appeared as the first, second or third author the most times. The findings appear to support the idea that research centres reinforce family business research. Universities should take cognisance of this and allocate funding accordingly.

The articles under review were published in 21 different journals. The majority of these were ISI or IBSS accredited with only four per cent not having any accreditation. The majority of South African family business articles were published in South African journals. The three journals which published the most articles were Management Dynamics, the South African Journal of Business Management, and the South African Journal of Economic and Management Sciences, with only the two latter journals having impact factors. To increase the impact of South African family business research, authors should focus on publishing in international journals with high impact factors. Furthermore, authors should seek to publish in journals which are available online and are open access.

South African family business researchers have published on a variety of different topics, the most common being succession, defining/describing family businesses, and governance. As such the research focus of South African researchers appears to have followed a similar trend to international research where, in the early years, the focus was mainly on succession issues (Sharma *et al.*, 2012: 10) and on defining a family business (Melin *et al.*, 2014: 2). A variety of other individual topics have also been investigated by South Africans. This variety corresponds with international research which shows that from the very beginning, family business researchers have investigated many different topics (Zahra and Sharma, 2004: 334). There is a need for research in South Africa to gain a deeper understanding of existing topics and to increase topical expertise (Melin *et al.*, 2014: 14). In addition, many new topics have also been identified that are in need of scholarly attention; “examples include the role of family enterprise in new venture creation, the informal economy, innovation and different institutional contexts” (Sharma *et al.*, 2012: 10). Classic topics such as organisational commitment, job satisfaction, team processes, justice as well as culture also still need to be fully explored and promising research awaits attention in traditional management areas such as accounting and marketing (Melin *et al.*, 2014: 14; Sharma *et al.*, 2012: 10). The heterogeneous and complex nature of

family businesses offers all researchers, including South Africans, a challenging range of topics to investigate (Sharma *et al.*, 2012: 5).

As was the case in the early days of the field (Davis, 1982 cited in Sharma *et al.*, 2012: 9), the focus of family business studies in South Africa has been on SMEs (Sharma *et al.*, 2012: 9). In more recent years, scholarly attention internationally has moved to both privately controlled and publicly held family businesses. South African family business researchers should also give more attention to larger family businesses in future studies. Much of the focus of family business studies internationally has also been skewed towards a focus on the business rather than on the family system (Melin *et al.*, 2014: 4; Sharma *et al.*, 2012: 10). As such, the “unit of analysis has largely been at the firm level” (Sharma *et al.*, 2012: 9). This too has been the case with South African family business researchers. Moores (2009) believes that the business family is key to understanding the domain of family business, while Litz *et al.* (2012: 27) suggest that an increased inclusion of family science in the study of family enterprises is necessary. South African family business researchers should take heed of these suggestions.

Most family business research today is “grounded in well-established theories drawn from other disciplines” (Casillas and Aceda, 2007: 142; Zahra and Sharma, 2004: 336). Agency theory and the resource-based view have however “dominated the discourse” (Chrisman *et al.*, 2010 cited in Sharma *et al.*, 2012: 11) in family business. The findings of this study, however, show no clear use of theories by South African authors. This finding corresponds with early research in the field which “dealt with strategic management topics, many of which were not based on grounded theoretical principles” (Sharma, Chrisman and Chua, 2003: 4). According to Schulze and Gedajlovic (2010: 201), “the field of family business research is still in its infancy, and the diversity of theory and opinion that characterise the field is likely to be atypical for a field at this stage of development”. In academia, “theory is the distinctive intellectual capital that provides legitimacy to a field of study” (Sharma, 2004: 24). Theory assists in “developing a language to express the reality around us, build on each other’s work and attracts and retain the attention of scholar from other disciplines to contribute to the field” (McKinley, Mone and Moon, 1999 cited in Sharma, 2004: 24).

South African family business scholars show an overwhelming preference for quantitative over qualitative research methods. Although this finding contradicts the early years in the field where researchers almost exclusively used qualitative methods, the methods used by South Africans are line with the dominant methods of more recent years (Wilson *et al.*, 2014: 7). The majority of articles under review show the use of advanced techniques to analyse the data. Advanced methods include at least multiple regression analysis or structural equation modelling. This trend is in line with the early 2000s where the field as a whole was dominated by survey methods and the use of more advanced statistical techniques. As Zahra and Sharma (2004: 336) warned at the time, South African scholars should take care that their research does not take on a “mechanical quality” and should strive to understand the real underlying forces leading to their empirical results. Furthermore, as Wilson *et al.* (2014: 9) suggests, South African authors should apply rigorous research standards to original methods that can help test and uncover the complex relationships between family and business variables.

The sampling method adopted by the vast majority of South African family business scholars is that of non-probability sampling with the average sample sizes being quite large (348). Although the sample sizes are large there are inherent problems associated with non-probability sampling. To advance family business research in South Africa, efforts should be made to develop databases from which probability sampling can be drawn, enabling results of studies to be generalised to the entire family business population.

## CONTRIBUTIONS AND IMPLICATONS

By reflecting on the field of family business research in South Africa in terms of the ‘who’, ‘what’ and the ‘how’, this study makes several contributions. By identifying ‘who’ the main researchers in the field are and at what institutions they are based, opportunities for future collaborations between them are enhanced. These collaborations could involve the sharing of resources and expertise, the examining of each other’s masters dissertations and doctoral theses, and the undertaking of combined research projects addressing national issues facing family businesses such as the influence of BBBEE on succession in family businesses.

By establishing ‘what’ South African family business researchers are investigating, the results of this study assist scholars in gauging their research against that of their international counterparts and against the field as a whole. Benchmarking allows them to assess whether their research is relevant and in line with international trends, which is important if they want to publish internationally and make a contribution to the conversation of the day in the field. Identifying what topics have been researched and comparing these to the field as a whole, allows for research gaps and ideas for future research in the African context to be highlighted. Furthermore, the relevance of their research in addressing the practical challenges facing family businesses can be ascertained. According to Zahra and Sharma (2004: 337), “the ultimate aim of researching family businesses is to inform, lead, enrich and guide managerial practice”. As such, South African family business researchers should ask themselves whether the topics they are investigating are leading to insights that “ultimately benefit the businesses and the families behind them, and in turn strengthen the economy and society as a whole” (Wilson *et al.*, 2014: 12).

Insights into ‘how’ South Africans scholars are undertaking family business research highlights the need for them to make more astute choices in their research designs, to employ both quantitative and qualitative methods and to explore alternative research methodologies and high-quality data sources (Benavides-Velasco *et al.*, 2013: 46). As Wilson *et al.* (2014: 10) comment, a need exists for a “sound understanding of methodological opportunities and for more in-depth statistical techniques”.

## LIMITATIONS

The analysis for this study was based on 48 journal publications only. The search for publications was done using mainly Google Scholar and Epsco Host, was restricted to journal publications only, and key search terms were limited. There is little doubt that several publications have been overlooked. Future research should expand the search for articles by using SciVal, Scopus and Web of Science, and key search terms should be increased. As such this study provides valuable insights into the “who, what and how” of family business research in South Africa, but a complete overview of the field of study in this country is lacking. Such an overview is needed to guide scholars in their future research endeavours. As Benavides-Velasco *et al.* (2013: 41) note, the “future of the field depends on a deeper knowledge of the past and it must build on the foundations of previous work”.

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