

# FAMILY INVOLVEMENT AND FIRM OUTCOMES: A BIBLIOMETRIC-SYSTEMATIC LITERATURE REVIEW

ANETE PAJUSTE<sup>1</sup> , VALERIJA KOZLOVA<sup>2</sup> , JELENA LUCA<sup>3</sup> ,  
MAIJA DOBELE<sup>4</sup> 

## ABSTRACT

**Purpose:** This paper explores the dynamics of family involvement and its impact on performance and long-term viability of family-owned enterprises (Powell and Eddleston, 2017; De Massis *et al.*, 2015). The study seeks to clarify the primary definitions of family involvement, examine the various methodologies and approaches employed to measure it, and synthesize existing research to evaluate its influence on corporate performance and organizational longevity.

**Design/methodology/approach:** A sequential multi-methods approach was employed. The research began with a bibliometric analysis that quantitatively mapped the field's intellectual structure and identified its principal thematic clusters. Insights from this mapping then informed the systematic literature review, which synthesized prior studies to assess core concepts, measurement practices, and documented outcomes related to family involvement in business.

**Findings:** The review identifies substantial conceptual fragmentation, with more than 30 definitions and 12 measurement approaches used to operationalize family involvement. The bibliometric mapping reveals four dominant thematic clusters that structure the field. Synthesizing 91 studies, we show that the effects of family involvement depend on how involvement is defined and measured, and on contextual moderators such as generational stage, governance quality, and cultural environment. Rather than uniformly positive or negative, outcomes emerge as contingent and often nonlinear, with moderate and active involvement associated with stewardship and innovation, and excessive or passive involvement linked to rigidity and governance challenges.

**Originality/value:** This paper offers the first integrated bibliometric-systematic review of family involvement research, combining quantitative mapping of 874 articles with an in-depth synthesis of 91 studies. It contributes a structured, multidimensional framework integrating five definitional dimensions and twelve measurement approaches, clarifying longstanding conceptual and methodological inconsistencies and proposes a future research agenda emphasizing contextual, longitudinal, and cross-cultural approaches to better explain how family involvement shapes firm performance and survival.

**Keywords** Family Involvement, Corporate performance, Family Business, Organizational Survival

**Type of the paper:** L25, G30

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<sup>1</sup> Anete Pajuste, Stockholm School of Economics in Riga, Latvia. E-mail: anete.pajuste@sseriga.edu

<sup>2</sup> Valerija Kozlova, Stockholm School of Economics in Riga, Latvia. E-mail: valerija.kozlova@sseriga.edu

<sup>3</sup> Jelena Luca, University of Latvia, Latvia. E-mail: jelenakomeleluca@gmail.com

<sup>4</sup> Maija Dobele, University of Latvia, Latvia. E-mail: maijadobele@gmail.com

## 1. INTRODUCTION

Family businesses are central to global economies, often dominating private sector production and employment (International Family Enterprise Research Academy [IFERA], 2003). Their complexity stems from the distinctive role of family involvement, which sets them apart from non-family firms (Powell and Eddleston, 2017). Beyond ownership or leadership, this involvement represents a fusion of family and business systems, shaping strategy and culture (Ahmad *et al.*, 2021). Such embeddedness is a double-edged sword: it can generate competitive advantage through long-term orientation, stakeholder ties, and “familiness” (Habbershon and Williams, 1999; De Massis *et al.*, 2015), yet also foster nepotism, resistance to professionalization, and destructive conflicts (Zattoni *et al.*, 2015). Family influence peaks during critical transitions, testing a firm’s continuity and success. At such moments, preserving socioemotional wealth- control, identity, and legacy- often outweighs economic goals, shaping strategic choices (Gómez-Mejía *et al.*, 2007). Managing this complexity is thus the central challenge determining whether the enterprise endures across generations or fails.

Studying family involvement is essential because it is the primary mechanism through which families shape firm behaviour, governance, and long-term outcomes (Chrisman *et al.*, 2018). It influences resource allocation, decision-making speed, innovation, succession, and risk preferences (Soluk *et al.*, 2021). Because family firms dominate economies globally, understanding how and to what extent families participate in ownership, management, and governance is critical for explaining heterogeneity in performance, longevity, and resilience. Without conceptual clarity on family involvement, it becomes difficult to compare findings, build cumulative theory, or design effective governance practices.

For the purposes of this paper, we use “family involvement”<sup>5</sup> as an umbrella term capturing the extent and form of family participation in ownership, management, governance, and strategic influence. This includes both formal roles and informal mechanisms (Chrisman *et al.*, 2018). Later sections unpack the fragmentation of definitions, but an initial working definition helps anchor the discussion.

The concept of family involvement in business remains fragmented and inconsistent, complicating both research and measurement (Bennedsen *et al.*, 2007). No universal definition exists, with scholars framing it through ownership, management, governance, or socioemotional dynamics (Sharma, 2004; Salvato *et al.*, 2019). Over thirty definitions, from passive shareholding to embedded executive roles, create ambiguity and hinder comparability (Chrisman *et al.*, 2012; Martínez-Alonso *et al.*, 2022). This conceptual fragmentation is closely connected to a second problem: measurement inconsistency. Studies operationalize family involvement through diverse indicators, ranging from quantitative scales to qualitative measures of commitment, identity, and day-to-day influence. These include ownership share,

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<sup>5</sup> “Family involvement” refers to structural and role-based participation in the firm, “family dynamics” captures the relational, emotional, and behavioural processes within the family that shape how involvement is enacted. The two are related but not identical: involvement describes who participates and in what capacity, whereas dynamics describe how family members interact, coordinate, and influence decisions. Both dimensions matter for understanding firm outcomes.

voting rights, board representation, family CEO status, executive participation, and broader measures such as the F-PEC scale (Astrachan *et al.*, 2002; Kim and Gao, 2013; Craig *et al.*, 2014). As a result, studies using the same term may capture different empirical realities. This limits comparability across findings and makes it difficult to determine whether mixed performance results reflect true theoretical differences or simply different operationalizations of family involvement.

The impact of family involvement on firm performance and longevity remains mixed and context dependent. Positive effects stem from stewardship and long-term orientation (Miller and Le Breton-Miller, 2006; Galavotti *et al.*, 2025), while negative outcomes include nepotism, rigidity, and agency conflicts (Villalonga and Amit, 2006; Bennedsen *et al.*, 2007). A key reason for these inconsistent findings may lie in the fragmented conceptualization and operationalization of family involvement itself. When studies define and measure family involvement differently, empirical results on firm outcomes become difficult to compare. This heterogeneity highlights the need for a unified framework that considers varying involvement forms, contextual moderators, and mechanisms of family influence. Advancing this research requires integrating quantitative indicators with qualitative insights into intra-family dynamics and governance.

This study synthesizes fragmented findings into a coherent overview of family business research. Using bibliometric mapping (Casprini *et al.*, 2020), it establishes a multidimensional perspective on family involvement, clarifying dynamics beyond simplified measures and offering an evidence-based framework for future work. The review highlights inconsistencies in how family dynamics affect performance (Kraus *et al.*, 2020), reflecting limited shared definitions, measures, and outcomes. To address these challenges, this study is guided by the following research questions:

**RQ1:** *How has family involvement been conceptualized across ownership, management, governance, socioemotional, and active/passive dimensions?*

**RQ2:** *How has family involvement been measured in empirical family business research?*

**RQ3:** *How do different forms of family involvement affect firm performance and longevity, and how are these effects shaped by generational stage, governance quality, cultural/institutional context, and active versus passive involvement?*

This study synthesizes peer-reviewed literature on family firms to ensure rigor (Davin and Troyan, 2025). Its scope covers the conceptualization and measurement of family involvement, from broad definitions to constructs like “familiness” (Zellweger *et al.*, 2010) and its documented effects on performance and survival. The review examines definitions, operationalization through scales and proxies, and links to financial and non-financial outcomes. Methodologically, it maps thematic clusters, synthesizes measurement practices, reviews empirical findings, and discusses gaps and contextual contingencies. It concludes with implications for advancing multidimensional, context-sensitive analyses of family involvement.

This study contributes to family business research in three ways. First, it uncovers the fragmented intellectual structure of family involvement research, showing how definitions,

measures, and outcome models have evolved into disconnected streams that limit cumulative theorizing. Second, it develops a multidimensional framework of family involvement that integrates five definitional domains and twelve measurement approaches. The framework (see Figure 3) clarifies how structural, relational, behavioural, and governance-related elements jointly shape family participation and addresses long-standing conceptual fragmentation. Third, it advances theory by identifying the contingent mechanisms, generational stage, governance quality, and cultural context, through which different forms of family involvement influence firm performance and longevity.

## **2. RESEARCH DESIGN AND METHODOLOGY**

This study adopts a multi-methods approach, integrating a bibliometric analysis with a systematic literature review (SLR). This hybrid methodology allows the research to gain the combined advantages of both techniques while mitigating the intrinsic weaknesses of each standalone method (Marzi *et al.*, 2025). Bibliometric analysis and SLR serve complementary purposes. Bibliometric techniques provide a quantitative, science-mapping perspective, identifying influential themes, authors, and conceptual clusters through co-occurrence and network analysis. In contrast, an SLR offers an in-depth, qualitative synthesis of theoretical constructs, measurement approaches, and empirical findings based on transparent and replicable selection criteria. Combining both methods enables us to map the intellectual structure of the field and then interpret it through a rigorous qualitative synthesis. This dual approach is increasingly recommended in fields characterized by conceptual fragmentation and heterogeneous methodologies, such as family business research. The initial bibliometric analysis provided a quantitative overview of the field's intellectual structure, which then guided the subsequent in-depth synthesis of the SLR. A SLR is the most appropriate method for addressing our research questions because the field of family involvement is conceptually fragmented, characterized by inconsistent definitions, heterogeneous measurement approaches, and contradictory empirical findings. As Kraus *et al.* argue, SLRs are particularly valuable in research domains where conceptual clarity is lacking, cumulative knowledge is difficult to establish, and prior studies use diverse theoretical and methodological approaches (Kraus *et al.*, 2020; Kraus *et al.*, 2022). An SLR enables a transparent, replicable, and bias-controlled synthesis of existing evidence, making it well suited to clarifying definitional boundaries, comparing measurement practices, and identifying contingent mechanisms linking family involvement to firm outcomes. Combining the SLR with bibliometric mapping further strengthens the analysis by revealing the intellectual structure of the field and guiding the qualitative synthesis.

The entire process was documented in accordance with the PRISMA framework (see Figure 1). The PRISMA framework is widely recognized as the methodological standard for ensuring transparency, replicability, and rigor in systematic reviews (Page *et al.*, 2021).

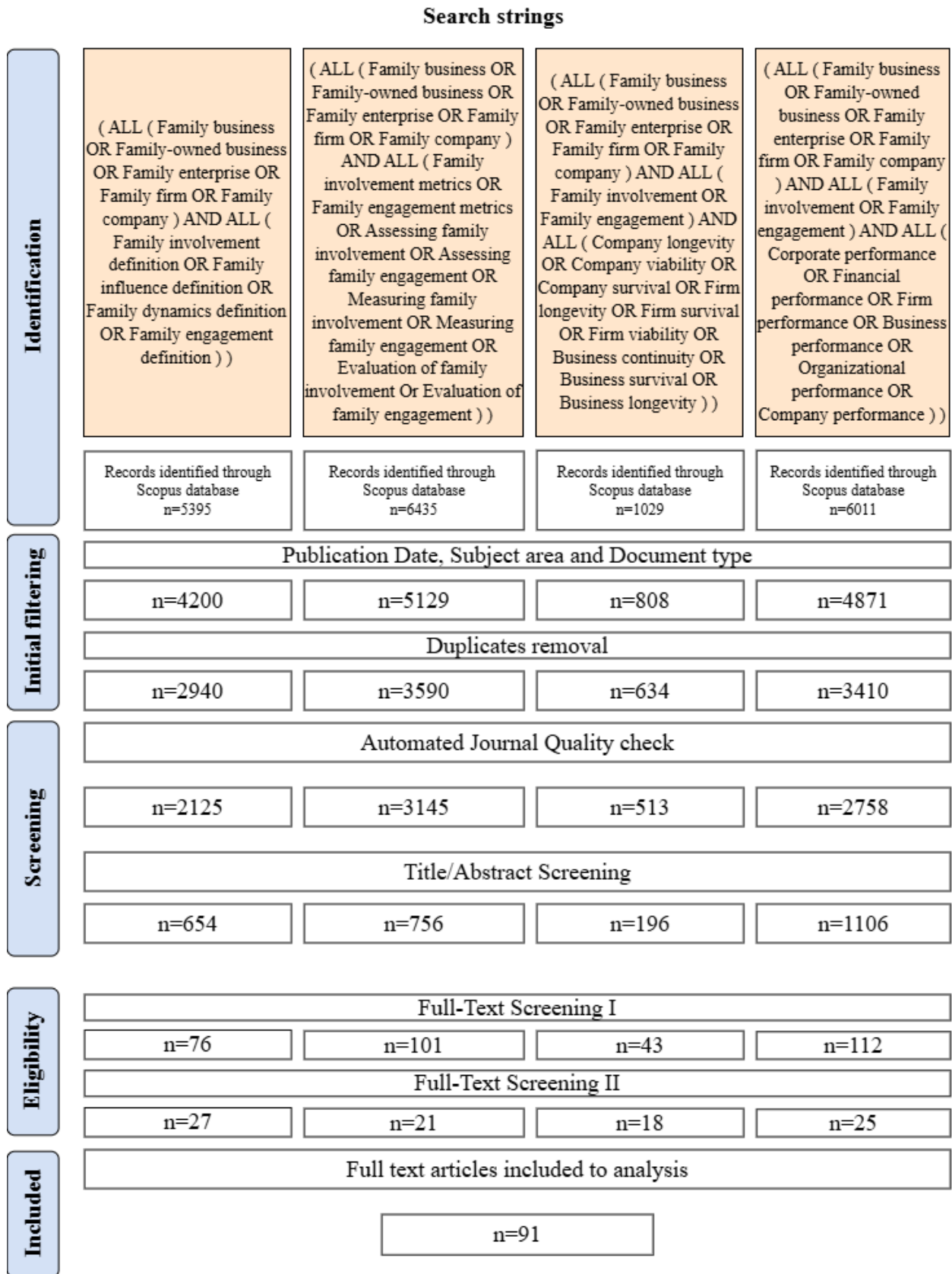


Figure 1 **Systematic literature review Prisma flowchart.**

Source: Created by the Authors

To identify the thematic structure of the review, we first conducted a keyword co-occurrence analysis in VOS viewer. This analysis produced eight clusters representing broad conceptual areas within family business research. All eight clusters were examined, but only four were selected for deeper synthesis because they directly aligned with our research questions: (1) conceptualization of family involvement, (2) measurement approaches, and (3) performance and longevity outcomes. The remaining clusters focused on adjacent topics that did not directly address the construct of family involvement and were therefore not included in the core synthesis. These four clusters then served as a data-driven scaffold for coding and organizing the 91 papers included in the SLR. They directly informed the structure of the SLR. Specifically, the definitional and governance-related clusters guided the coding of RQ1 (conceptualization), the measurement-related cluster guided RQ2 (operationalization), and the performance-related cluster guided RQ3 (outcomes). The SLR themes presented in Section 4 therefore mirror the conceptual boundaries revealed by the bibliometric mapping, ensuring that the qualitative synthesis is grounded in the field's empirical structure. This provided a data-driven basis for the qualitative synthesis. Keyword selection for both bibliometric and systematic reviews followed the research questions, expanded in four stages with synonyms and related terms, and searched in Scopus. To ensure comprehensive coverage, authors developed search strings iteratively, beginning with core terms related to family involvement and expanding them with synonyms and related constructs. The final search strings combined keywords using Boolean operators. Examples include "*family involvement*" AND "*family firm*" AND performance, "*family ownership*" OR "*family management*" OR "*family governance*", "*socioemotional wealth*" AND "*family involvement*" and "*familiness*" AND (measurement OR scale). These strings were adapted for Scopus syntax and applied to titles, abstracts, and keywords. The full list of search strings is provided in Appendix 1.

A structured filtering protocol excluded papers outside 2000–2025, removed duplicates, and applied journal quality checks via a Python script (Thelwall, 2022), retaining only AJG 3–4\* or Scimago Q1 journals. Manual screening then proceeded in two stages: title/abstract filtering (Mateen *et al.*, 2013) and full-text review. Reliability was ensured through dual review by three researchers, with disagreements resolved by discussion (Waffenschmidt *et al.*, 2019). This rigorous process yielded 91 papers for inclusion.

### **3. BIBLIOMETRIC ANALYSIS**

To complement the systematic review, a bibliometric analysis mapped the intellectual structure of family firm and governance research. Using VOS viewer, a co-occurrence network was generated from 874 Scopus-indexed articles, with node size reflecting term frequency and colours marking thematic clusters. This approach reveals relationships among key concepts, enhancing thematic understanding and clarifying the intellectual foundations of family involvement research (Radhakrishnan *et al.*, 2017; Klarin, 2024).

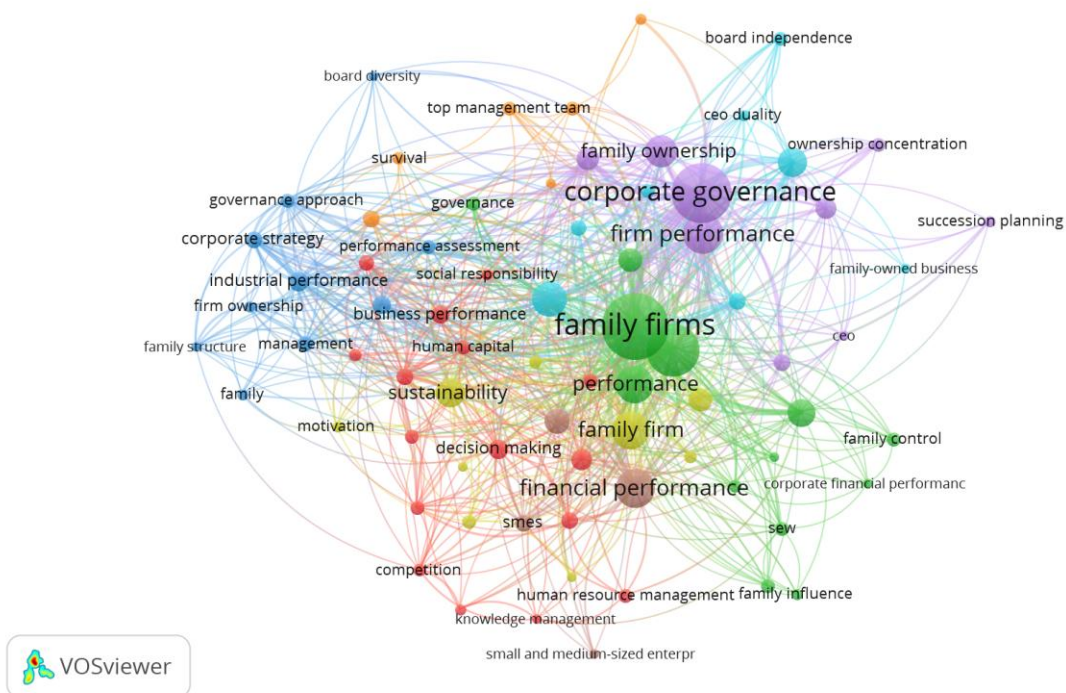


Figure 2 **Conceptual network of key themes in family business and corporate governance research.** Source: Created by the Authors

The bibliometric mapping revealed eight clusters, four of which form the backbone of the SLR. The Green Cluster examines structural features of family firms—ownership concentration, control, and succession—showing benefits like patient capital and long-term orientation but also risks of governance tensions (Martín-Oliver *et al.*, 2024; Steier *et al.*, 2015; Chrisman *et al.*, 2018). The Blue Cluster focuses on strategy and organizational management, highlighting how ownership, board diversity, and top team composition shape competitiveness and survival (Tram *et al.*, 2020; Camisón-Zornoza *et al.*, 2020; Friedman and Carmeli, 2021; Chrisman *et al.*, 2021). The Red Cluster addresses human capital and social responsibility, stressing sustainability, motivation, and ethical practices as drivers of long-term value (Campos-Valenzuela *et al.*, 2025; Herrera and De Las Heras-Rosas, 2020; Sanguino *et al.*, 2022). The Purple Cluster explores governance mechanics and socioemotional wealth, showing how board independence, CEO duality, and family ownership interact with SEW to shape outcomes (Sánchez-Marín *et al.*, 2021; Craig and Newbert, 2017). Together, these clusters illustrate interconnected strands of governance, strategy, performance, and organizational behavior in family involvement research.

#### 4. RESEARCH RESULTS

Although Section 4 is structured around the three research questions, each subsection integrates insights from the four bibliometric clusters, which inform the thematic synthesis aligned with the research questions. We explicitly reference these clusters where relevant to show how the quantitative mapping informs the qualitative synthesis.

#### 4.1. Family involvement

These findings primarily draw on the Green Cluster (structural features of family firms) and the Blue Cluster (strategic and managerial implications of ownership and control).

Family involvement is a defining feature of businesses worldwide, rooted in long-term orientation. Families aim to pass firms to future generations, retain control (Crocchi *et al.*, 2011), preserve values and culture (Denison *et al.*, 2004), and build legacies (Jaskiewicz *et al.*, 2015). Involvement also provides trusted employment (Murphy and Lambrechts, 2015) and draws on loyalty and commitment (Davis *et al.*, 2010), though challenges such as conflict and blurred boundaries persist. Empirical studies show family involvement can enhance performance and survival through dedication and unique resources (Poutziouris *et al.*, 2015), but may also raise agency costs, favouritism, and resistance to professionalization (Steier *et al.*, 2015). Proximity fosters firm-specific knowledge and commitment (Cano-Rubio *et al.*, 2021), yet creates a trade-off between continuity and adaptation (Kotlar and Chrisman, 2019). Family ownership shapes governance and sustainability, reflecting both economic and socioemotional wealth (Gómez-Mejía *et al.*, 2007). As a distinct resource, family influence builds capabilities and competitive advantages through culture-rooted values and stakeholder ties (Habbershon and Williams, 1999; Pearson *et al.*, 2008; Hoffman *et al.*, 2006; Shanker and Astrachan, 1996; Sorenson *et al.*, 2009).

#### 4.2. Family involvement definitions

The definitional fragmentation identified here aligns with the Purple Cluster, which emphasizes governance structures and socioemotional wealth, and with the Green Cluster, which highlights ownership and control as core definitional anchors.

Despite decades of research, defining family involvement, central to distinguishing family firms, remains contested, with over thirty definitions identified (Sharma, 2004; O'Boyle *et al.*, 2012). Scholars approach it through ownership, measured by equity or voting power (Anderson and Reeb, 2003), stewardship commitments (Miller and Le Breton-Miller, 2006), or socioemotional attachment (Gómez-Mejía *et al.*, 2007). Others emphasize broader influence, noting both strengths and challenges such as conflict or nepotism (Donnelley, 1988; Kets de Vries, 1994; Dyer, 1989), framing involvement as participation in decision-making (Craig *et al.*, 2014) or as a multidimensional construct of control, continuity, and commitment (Debicki *et al.*, 2016; Mahto *et al.*, 2020; Sharma and Salvato, 2013). Management-based definitions stress active leadership and daily engagement (Martínez-Alonso *et al.*, 2022; Tan *et al.*, 2022), while broader frameworks place involvement along a continuum of ownership, governance, and identity (Salvato *et al.*, 2019), with qualitative views highlighting motivations and emotional ties (Chrisman *et al.*, 2004). Scholars also distinguish active involvement, direct participation in management and governance (Miller *et al.*, 2007; Martínez-Alonso *et al.*, 2022), from passive ownership, where families rely on boards, councils, or external advisors (Corbetta and Salvato, 2004; Zehrer and Leiß, 2020; Foss *et al.*, 2021; Kammerlander *et al.*, 2020). Overall, definitions cluster into five groups: ownership, management, influence, multidimensional, and active vs. passive involvement.

Synthesizing the reviewed studies, we identify five definitional dimensions that consistently recur across the literature: (1) ownership involvement, (2) management involvement, (3) governance involvement, (4) socioemotional and identity-based involvement, and (5) active versus passive involvement. These dimensions form an analytical schema that helps explain why empirical findings differ: studies focusing on structural involvement (ownership, board seats) often report different outcomes than those examining behavioral or socioemotional involvement.

### 4.3. Family involvement measurement approaches

Measurement practices map closely onto the Blue Cluster (management and strategy) and the Purple Cluster (governance and SEW), reflecting how different conceptual emphases produce distinct operational indicators.

Measuring family involvement remains a central challenge. All identified approaches were grouped into 12 overlapping categories. One of the earliest tools, the F-PEC scale, captures power, experience, and culture as qualitative dimensions of family influence (Astrachan *et al.*, 2002). Quantitative measures focus on ownership, such as family shareholding or voting rights (Anderson and Reeb, 2003; Miroshnychenko *et al.*, 2024), board representation (Villalonga and Amit, 2006), or whether the CEO is a family member (Schmid *et al.*, 2014; Scholes *et al.*, 2021). Family ownership has also been assessed through equity concentration and voting rights (Matzler *et al.*, 2015; Memili *et al.*, 2018).

A second group examines family involvement in management, measuring executive participation across leadership roles (Kim and Gao, 2013; Martínez-Alonso *et al.*, 2022; Cano-Rubio *et al.*, 2021; Galavotti *et al.*, 2025; Tan *et al.*, 2022; Chrisman *et al.*, 2012), with extensions to middle management (Hu *et al.*, 2018). Qualitative scales capture emotional and cultural dimensions, such as pride, loyalty, and commitment (Chrisman *et al.*, 2012; Sherlock *et al.*, 2023), or daily operational presence (Craig *et al.*, 2014; Kandade *et al.*, 2021).

Finally, scholars distinguish active involvement, as direct participation in governance and management (García-Castro and Aguilera, 2014; Martínez-Alonso *et al.*, 2022), from passive involvement, where families hold equity but delegate leadership to non-family professionals (Corbetta and Salvato, 2004; Zehrer and Leiß, 2020; Foss *et al.*, 2021; Belot and Waxin, 2017). This distinction highlights how families may retain financial control while shaping firm behavior indirectly.

In summary, the diversity of these approaches underscores the inherent complexity and multidimensional character of family involvement. Measures range from structural indicators, such as ownership percentages, board representation, and executive roles, to more nuanced constructs like commitment, day-to-day engagement, and influence over decision-making. Together, these perspectives reflect the intertwined economic, managerial, and socioemotional dimensions that define family firms.

To synthesize these definitional and measurement insights, Figure 3 presents a multidimensional framework of family involvement that integrates the five recurring

definitional dimensions and twelve consolidated measurement approaches identified in the review.

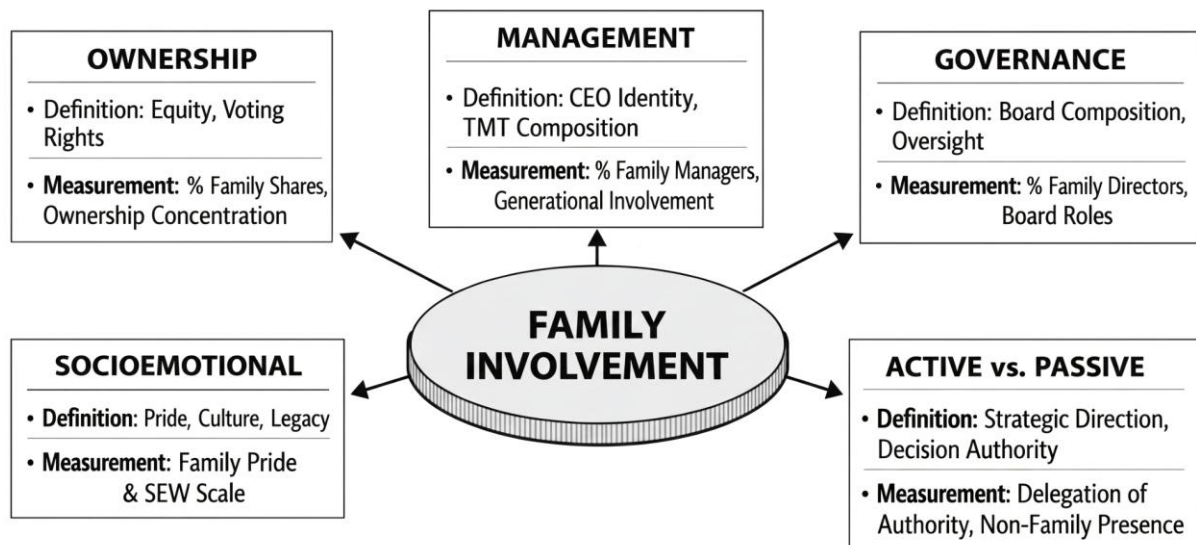


Figure 3 **Multidimensional Framework of Family Involvement (Definitional Dimensions and Measurement Approaches)**. Source: Created by the Authors.

#### 4.4. Family involvement impact on performance and survival

The performance outcomes discussed in this section integrate insights from the Green Cluster (structural features and ownership concentration), the Blue Cluster (strategic and managerial processes), the Red Cluster (human capital and sustainability), and the Purple Cluster (governance mechanisms and socioemotional wealth).

A key insight emerging from the review is that the relationship between family involvement and firm-level outcomes depends strongly on how involvement is defined and measured. Ownership-based definitions tend to produce linear or modest effects, management-based definitions often reveal curvilinear or generational effects, and socioemotional definitions highlight trade-offs between economic and non-economic goals. This definitional heterogeneity explains much of the inconsistency in prior findings and underscores the need for multidimensional conceptualization.

Family involvement is a key factor in firm performance and survival, yet its effects remain complex and inconsistent. Evidence shows benefits from long-term orientation, commitment, and control, but overall financial impact is only modestly positive (Gómez-Mejía *et al.*, 2011). Variation largely reflects how involvement manifests across ownership, management, and governance roles (Chrisman *et al.*, 2018; Lee, 2006; Poutziouris *et al.*, 2015; Sciascia and Mazzola, 2008).

##### 4.4.1. Positive performance outcomes of family involvement

Many of the positive effects identified here correspond to the Green Cluster (long-term orientation, continuity) and the Blue Cluster (strategic alignment and managerial cohesion).

Studies show that active family involvement often enhances firm performance, especially where generational ambitions and continuity are prioritized. Evidence from Chinese family firms links involvement with longevity goals to improved outcomes (Kim and Gao, 2013; Li *et al.*, 2024), while small firms benefit from faster decisions, aligned interests, and shared knowledge in early growth stages (Galavotti *et al.*, 2025). Family owners foster continuity, adaptability, and lower turnover (Chrisman *et al.*, 2012; Miller and Le Breton-Miller, 2006; Belot and Waxin, 2017), and active participation can stimulate innovation and renewal (Martínez-Alonso *et al.*, 2022). Performance during ownership transitions is highly contingent on governance, culture, and the quality of involvement rather than formal models (De Massis *et al.*, 2015).

#### 4.4.2. *Negative performance outcomes of family involvement*

The risks and constraints highlighted in this subsection reflect themes from the Purple Cluster (governance tensions, SEW trade-offs) and the Red Cluster (human capital challenges).

Research also highlights negative consequences of increased family involvement (Kosmidou, 2020). Firms with many family managers often show weaker performance, especially in later generations marked by conflict and complexity (Bennedsen *et al.*, 2007; Cucculelli and Micucci, 2008; Villalonga and Amit, 2006). Prioritizing socioemotional goals may compromise economic outcomes (Berrone *et al.*, 2012), while high family presence can reduce risk-taking and limit performance (Chrisman *et al.*, 2018; De Massis *et al.*, 2013). Excessive influence may hinder innovation (Tan *et al.*, 2021; Diéguez-Soto *et al.*, 2019), and agency theory points to emotional decision-making, reluctance to seek external input, and limited expertise as further risks (Chrisman *et al.*, 2004; Schulze *et al.*, 2001). Passive ownership without management control can exacerbate succession challenges (De Massis *et al.*, 2008; Zehrer and Leiß, 2020), while biased HR practices may undermine efficiency (Kotlar and Chrisman, 2019).

#### 4.4.3. *Mixed and contingent effects on performance*

The contingent patterns align with cross-cluster interactions, particularly between the Blue Cluster (strategy), Purple Cluster (governance), and Red Cluster (sustainability and stakeholder relations).

The relationship between family involvement and performance is contextual rather than uniformly positive or negative. Outcomes vary with firm size, age, industry, and ecosystem (Galavotti *et al.*, 2025; Bammens *et al.*, 2011; Taras *et al.*, 2018). Moderating factors, such as balancing short- and long-term goals (Kammerlander *et al.*, 2020), family cohesion and commitment (De Massis *et al.*, 2015), and generational ambitions (Kim and Gao, 2013), shape results. Governance research shows a sequential mechanism: involvement influences board processes (Bammens *et al.*, 2011; Forbes and Milliken, 1999), which affect strategic and control tasks (Gabrielsson and Winlund, 2000; Johnson *et al.*, 1996), ultimately determining performance (Minichilli *et al.*, 2009; Zahra and Pearce, 1989). Thus, effects depend on governance quality, strategic alignment, and contextual fit.

#### 4.4.4. *Family involvement and firm survival*

Survival mechanisms draw on the Green Cluster (structural continuity), Purple Cluster (governance and SEW), and Red Cluster (resilience and stakeholder trust).

Beyond financial outcomes, family involvement plays an ambiguous role in firm longevity, defined as survival across generations and adaptive capacity (Ahmad *et al.*, 2021; Herrera and De Las Heras-Rosas, 2020). Studies link superior survival to long-term orientation, socioemotional wealth, and intergenerational commitment, which strengthen resilience and stakeholder trust (Miller and Le Breton-Miller, 2006; Ahmad *et al.*, 2021; Matzler *et al.*, 2015; Zellweger *et al.*, 2010). Founder-led firms benefit from embedded knowledge and affective commitment that promote legacy-minded endurance (Chrisman *et al.*, 2012). Yet reliance on familial governance may cause inertia, underinvestment, and resistance to professionalization (Villalonga and Amit, 2006; Wu *et al.*, 2025). Passive ownership can heighten succession risks (De Massis *et al.*, 2008; Zehrer and Leiß, 2020), while emotional attachment and non-economic priorities may impair adaptability in competitive environments (Gómez-Mejía *et al.*, 2007; Berrone *et al.*, 2012).

#### 4.4.5. *Contextual and contingent effects on longevity*

The effect of family involvement on longevity is contingent on moderating factors such as generational stage, governance quality, industry, and culture. Some studies suggest curvilinear effects, where moderate involvement supports sustainability, but excessive levels create rigidity or conflict (Debicki *et al.*, 2016; Kammerlander *et al.*, 2020). Succession planning enhances survival only when combined with managerial competence and sound governance (De Massis *et al.*, 2015). Cross-cultural research shows variation: collectivist contexts strengthen positive effects, while individualist settings favor hybrid governance (Powell and Eddleston, 2017; Hu *et al.*, 2018). Overall, survival reflects the interaction of family dynamics, organizational structures, and institutional environments.

#### 4.4.6. *Summary*

Across performance and longevity outcomes, family involvement emerges not as a universally beneficial or harmful factor but as a multifaceted, context-dependent phenomenon. Its effects hinge on how ownership and management structures are combined, how socioemotional priorities shape decision-making, and how governance and generational dynamics align with the firm's strategic and environmental conditions. While family involvement can provide a powerful foundation for continuity, adaptability, and long-term success, it can equally generate constraints related to rigidity, conflict, or resistance to change. Understanding these complexities is essential for developing more nuanced theoretical frameworks and for designing governance practices that harness family strengths while mitigating potential weaknesses.

## 5. DISCUSSION

### 5.1. Originality and Covered Research Gaps

The review shows that fragmentation surrounding family involvement is not merely a definitional inconvenience but a structural barrier to cumulative knowledge in family business research. The identification of more than 30 definitions and 12 measurement approaches demonstrates that scholars conceptualize involvement through incompatible lenses: ownership, management, governance, socioemotional attachment, and influence. This heterogeneity explains why prior studies report inconsistent effects on performance and longevity: researchers are often studying different constructs under the same label. By mapping 874 articles and synthesizing 91 studies, our analysis reveals a unifying insight: family involvement is not a single construct but a multidimensional configuration whose effects depend on how its dimensions combine and under which contextual conditions they operate. This insight helps reconcile contradictory findings in the literature. For example, positive outcomes associated with stewardship and long-term orientation (Miller and Le Breton-Miller, 2006) coexist with negative outcomes such as rigidity and nepotism (Villalonga and Amit, 2006) because different studies examine different forms of involvement: active versus passive, concentrated versus dispersed, managerial versus purely ownership-based. Thus, our study clarifies that involvement is not inherently beneficial or harmful; its effects are contingent, nonlinear, and context-specific, a conclusion supported by multiple studies in our sample (Debicki *et al.*, 2016; Kammerlander *et al.*, 2020).

Answering RQ1, this synthesis provides the first structured overview of the definitional diversity surrounding family involvement and demonstrates why a unified conceptual baseline is needed. Addressing RQ2, the review identifies 12 distinct measurement approaches, ranging from structural indicators (ownership percentage, board representation, CEO identity) to qualitative scales capturing commitment, identity, and day-to-day engagement. This heterogeneity explains the limited comparability of empirical findings and the persistent challenges to measurement validity. In response to RQ3, the synthesis shows that outcomes depend on multiple contingencies, including the form of involvement, generational stage, governance quality, cultural and institutional context, and strategic alignment. Moderate, active involvement tends to support stewardship, innovation, and continuity, whereas excessive or passive involvement increases rigidity, conflict, and succession risks.

Taken together, these findings demonstrate that family involvement operates through mechanisms rather than categories, specifically governance processes, intergenerational trust, decision speed, and socioemotional priorities. This study advances family business research in three ways. It shows that fragmentation in family involvement research is a major barrier to cumulative knowledge. More than 30 definitions and 12 measurement approaches were identified, showing that scholars often study different aspects of involvement (ownership, management, governance, socioemotional attachment, and active or passive participation) under the same label. This helps explain why prior studies report mixed effects on performance and longevity. As well it provides an integrated bibliometric–systematic review by mapping

874 articles and synthesizing 91 studies, thereby clarifying the intellectual structure of family involvement research. It develops a multidimensional framework that consolidates fragmented definitions and measurement practices across ownership, management, governance, socioemotional, and active/passive dimensions. And it advances theory by showing that family involvement does not have uniform effects; rather, its impact on performance and longevity is contingent, nonlinear, and shaped by generational stage, governance quality, cultural context, and strategic alignment.

These findings address the three research questions directly. RQ1 is answered by showing how family involvement has been conceptualized across multiple dimensions. RQ2 is addressed by identifying diverse measurement approaches, from structural proxies such as ownership share and board representation to qualitative indicators such as commitment, identity, and daily engagement. RQ3 is answered by demonstrating that moderate and active involvement can support stewardship, innovation, and continuity, whereas excessive, passive, or poorly governed involvement may create rigidity, conflict, and succession risks. Overall, the study provides a clearer foundation for future research by linking definitional clarity, measurement validity, and context-sensitive theorizing.

## **5.2. Future research directions**

The findings of this review reveal substantial conceptual fragmentation, heterogeneous measurement practices, and context-dependent outcomes in family involvement research. To support cumulative theorizing, future studies should adopt more integrated, multidimensional approaches that reflect the complexity of how families participate in ownership, management, governance, and socioemotional domains.

Building on the gaps identified across the bibliometric clusters and the systematic synthesis, we propose a structured research agenda that advances the field along four interconnected directions: (1) conceptual clarification, (2) development of more valid and multidimensional measurement tools, (3) examination of mechanisms linking involvement to performance and longevity, and (4) deeper attention to contextual moderators such as generational stage, governance quality, and cultural environment.

Table 1 summarizes these research opportunities and organizes them into a coherent agenda for future work. The subsequent subsections elaborate each thematic direction in detail, outlining specific questions and methodological pathways for advancing theory and empirical evidence.

Table 1. Future research directions

Dimension	Review-based gap	Future research questions
<i>1. Family involvement definition</i>	The review shows that family involvement is defined inconsistently across ownership, management, governance, and socioemotional dimensions, limiting comparability across studies.	<ul style="list-style-type: none"> <li>● How can future studies distinguish more clearly between ownership-based, management-based, governance-based, and socioemotional dimensions of family involvement?</li> <li>● Which dimensions of family involvement are most consequential for explaining differences in performance, continuity, and survival across firms?</li> </ul>
<i>2. Measurement</i>	Most studies rely on narrow proxies, such as ownership share, CEO status, or board presence, while behavioral and socioemotional dimensions are captured less consistently.	<ul style="list-style-type: none"> <li>● How can multidimensional measures of family involvement be developed that combine structural indicators with relational and socioemotional dimensions?</li> <li>● To what extent do different measurement approaches produce systematically different findings on the effects of family involvement?</li> </ul>
<i>3. Linkages between family involvement and firm performance and survival</i>	The review finds that the effects of family involvement on performance and longevity are mixed and context-dependent, suggesting that the relationship is indirect rather than uniform.	<ul style="list-style-type: none"> <li>● Through which mechanisms does family involvement influence firm performance, continuity, and survival?</li> <li>● Under what conditions does family involvement strengthen long-term continuity and when does it instead create rigidity, conflict, or reduced adaptability?</li> </ul>
<i>4. External environment</i>	The evidence base is concentrated in developed-market settings, while transitional and institutionally volatile contexts remain underexplored.	<ul style="list-style-type: none"> <li>● How do institutional and cultural contexts shape the consequences of family involvement for business continuity and firm performance?</li> <li>● How do generational stage, industry conditions, and regional institutional environments moderate the effects of family involvement on firm outcomes?</li> </ul>

Source: Created by the Authors

### 5.2.1. Theme 1: Family involvement definition

Family involvement remains fragmented, with more than 30 definitions across ownership, management, socioemotional, and identity dimensions (García-Castro and Aguilera, 2014). Future work should unify formal and informal mechanisms (De Massis *et al.*, 2015), integrate agency, stewardship, SEW, and resource-based views (De Massis *et al.*, 2015), distinguish active vs. passive roles (Chrisman *et al.*, 2012), refine Salvato *et al.*'s (2019) continuum, and address generational layering (Craig *et al.*, 2014; Kim and Gao, 2013).

### 5.2.2. Theme 2: Family involvement measurement

Methods often rely on narrow proxies (shareholding, CEO status, board representation) overlooking relational and behavioral complexity (Kahwati *et al.*, 2016), limiting comparability (Astrachan *et al.*, 2002). Future research should develop multidimensional tools integrating structural, relational, and behavioral indicators (Chrisman *et al.*, 2018), use mixed methods, and apply advanced psychometrics for reliability across contexts.

### 5.2.3. Theme 3: Linkages with performance and survival

Findings remain inconclusive (Ahmad *et al.*, 2021). Research should examine governance, flexibility, trust, and decision speed, distinguish financial vs. non-financial outcomes (Anderson and Reeb, 2003), and test non-linear effects where moderate involvement fosters stewardship but excess creates inefficiencies (Debicki *et al.*, 2016). Multi-level and longitudinal designs are needed to capture resilience during succession and crises.

### 5.2.4. Theme 4: External environment

Effects on longevity are contextual, shaped by generation, governance, industry, and culture. Moderate involvement may sustain firms, while excess risks rigidity (Debicki *et al.*, 2016; Kammerlander *et al.*, 2020). Succession, cultural norms, and institutions moderate outcomes, requiring cross-cultural and longitudinal studies (De Massis *et al.*, 2015; Powell and Eddleston, 2017; Hu *et al.*, 2018; Scholes *et al.*, 2021).

## 5.3. Limitations

This study has several limitations. First, like all systematic reviews, it is exposed to potential publication bias, as peer-reviewed journals are more likely to publish statistically significant or theoretically novel findings. To mitigate this risk, the review combined bibliometric mapping with systematic synthesis and explicitly incorporated contradictory as well as supportive evidence, rather than privileging a single dominant narrative. Second, the field itself remains marked by substantial conceptual and measurement heterogeneity, which limits direct comparability across studies (Sharma, 2004; Chrisman *et al.*, 2012; Salvato *et al.*, 2019). However, this is not merely a weakness of the evidence base; it is also the central phenomenon this review was designed to clarify. Third, the search strategy was restricted to Scopus-indexed, peer-reviewed journal articles, which may have excluded relevant work from other databases or grey literature (Mongeon and Paul-Hus, 2015; Singh *et al.*, 2020). This restriction was deliberate, as the study prioritized rigor, transparency, and comparability through journal-quality filters and PRISMA-based screening procedures. Fourth, the conclusions remain

constrained by the predominance of cross-sectional studies in the underlying literature, which limits strong causal inference. For this reason, the findings are interpreted as contingency-based patterns rather than universal causal relationships. Overall, while these limitations qualify the scope of the conclusions, they do not undermine the validity of the study's main contribution: providing a structured and theoretically grounded synthesis of a fragmented research field.

## 6. CONCLUSION

To synthesise the main insights emerging from this review, several key conclusions can be drawn.

1. This study identifies a persistent imbalance in the literature between research on family involvement and research on family dynamics, despite their conceptual distinction as structural versus relational, behavioural dimensions.
2. The systematic review shows that empirical studies overwhelmingly rely on narrow structural proxies, such as ownership concentration, CEO identity, and board representation, which capture who is present in the firm but not how family members interact or influence decisions.
3. Current evidence provides only a partial understanding of how family involvement shapes firm outcomes, because existing measures focus on structural participation,
4. Future research should incorporate relational and behavioural indicators, such as cohesion, conflict patterns, communication quality, and governance routines, to better capture the mechanisms through which families affect performance and longevity.
5. By highlighting definitional fragmentation and measurement bias, this review provides a clearer foundation for developing multidimensional, dynamics-sensitive approaches to studying family involvement.

### **Declarations**

*Declaration of Originality and Conflict of Interest: The manuscript has not been previously published, submitted or uploaded to any archive or pre-print server. We have not plagiarised or self-plagiarised any previous sources. Any tables or figures displayed in the manuscript are of our own creation, and we hold the copyright for these materials. The authors have no relevant financial or non-financial interests to disclose.*

### **Authors' contribution**

*Author 1 conceptualization, methodology, data collection and analysis, and drafting of the manuscript.*

*Author 2 conceptualization, methodological refinement, supervision, and manuscript review and editing.*

*Author 3 methodology, data collection and analysis, interpretation of results, and drafting of the manuscript.*

*Author 4 conceptualization, supervision, interpretation of findings, and manuscript review and editing.*

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## **APPENDIX 1**

Database search strings for the SLR

( ALL ( Family business OR Family-owned business OR Family enterprise OR Family firm OR Family company ) AND ALL ( Family involvement definition OR Family influence definition OR Family dynamics definition OR Family engagement definition ) )

( ALL ( Family business OR Family-owned business OR Family enterprise OR Family firm OR Family company ) AND ALL ( Family involvement metrics OR Family engagement metrics OR Assessing family involvement OR Assessing family engagement OR Measuring family involvement OR Measuring family engagement OR Evaluation of family involvement Or Evaluation of family engagement ) )

( ALL ( Family business OR Family-owned business OR Family enterprise OR Family firm OR Family company ) AND ALL ( Family involvement OR Family engagement ) AND ALL ( Company longevity OR Company viability OR Company survival OR Firm longevity OR Firm survival OR Firm viability OR Business continuity OR Business survival OR Business longevity ) )

( ALL ( Family business OR Family-owned business OR Family enterprise OR Family firm OR Family company ) AND ALL ( Family involvement OR Family engagement ) AND ALL ( Corporate performance OR Financial performance OR Firm performance OR Business performance OR Organizational performance OR Company performance ) )