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# **The role of gender in family-business research – a systematic review of the literature**

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## **Abstract**

Despite several calls for more systematic research on the role of gender aspects for entrepreneurial family businesses, rather little research on such topics has been published in the leading family business journals. More research has been published in niched or lower-ranked journals as well as books. The aim of this chapter is to provide a systematic literature review of the intersection between gender and family business research published in different kinds of outlets, outlining the status quo of the discussion along different themes as well as a research agenda to help move the field forward.

## **Introduction**

In 2009, the Family Business Review (FBR) published a review of research examining women's involvement in family firms (Martinez Jimenez, 2009). The author identified two waves of research findings published since 1985: The first wave centered around analyzing obstacles and difficulties that women encountered when joining their family firms as well as on the lack of recognition for their work. The second wave, mainly consisting of more recent publications, appeared to be more positive towards women's involvement, discussing opportunities and advantages that family businesses can offer women, the pathways of women into leadership positions as well as their performance. Despite an apparent increase in interest in women's role in family businesses, Martinez Jimenez (2009) found the research to still be fragmented and little empirical, confirming Sharma's (2004: 14) statement that the family business field lacks systematic research about contextual and individual factors related to women in these firms, and especially leadership positions. Martinez Jimenez concluded that no academic work had analyzed the leadership style of women in the family firm in depth and called especially for more research on "how women run their family firms, what their leadership style is, or how they behave with other members of the firm" (ibid: 60). However, there appears not only to be a dearth of empirical studies, but also of explicit, gender-based theorizing – for example, Al-Dajani et al. (2014: 218) regret that "despite a growing interest in gender and family business, there is limited literature that explores gender theory within family business research".

Why is a better understanding of the relation between gender and family business relevant? The first, and rather obvious, reason is that women constitute one half of family members, and thus it will be difficult to fully understand family businesses without considering women's roles more explicitly. Secondly, recent studies propose that family-business successions through daughters outperform those by sons (Ahrens et al., 2015), and the highly-educated generation of young women in family businesses increasingly questions the tradition of primogeniture male succession. Also, family businesses are more often run by a female CEO than non-family firms (Jorissen et al., 2005). Thus, a better understanding of women's leadership of family businesses could make an important contribution to family-firm practice. Thirdly, gender does not only concern women. Rather, both women and men are increasingly questioning and traverse traditional family and gender role patterns – for example, living in patchwork families or with transgender identities. These trends represent a move beyond common images of what constitutes a family and family roles, and will increasingly have an impact on family businesses and their core questions, such as succession and transgenerational entrepreneurship. Thus, they deserve more focused theorizing.

Almost a decade of research has been published since Martinez Jimenez's (2009) review, which included articles mainly until 2005. The aim of this chapter is to provide an up-to-date, systematic literature review of the research on the intersection between gender and family business published since then, outlining the status quo of the discussion and suggesting a research agenda to move the field forward. The remainder of this chapter is structured as follows. Next, we will briefly introduce the method used for our systematic literature review. Then, we will present the results along identified themes. We conclude the chapter by outlining gaps in current research and propose how these could be filled.

## **Method**

In this chapter, we systematically review research published about the link between gender and family firms since 2006 (though excluding articles that have been mentioned in Martinez Jimenez's (2009) review). More specifically, the academic database Scopus was searched with the following query: TITLE-ABS-KEY (gender OR son OR daughter OR couple OR wife OR husband OR father OR mother OR brother OR sister OR female OR male OR wom\*n OR patriarch OR matriarch OR parent OR sibling) AND ("family firm" OR "family business" OR "family ent\*") AND PUBYEAR > 2005, restricted to business, management and accounting, published in English language, and excluding conference papers. This search led to 408 publications (articles, reviews, books, book chapters, articles in press and editorials). Based on the titles and abstracts, only those publications relevant for the relation between gender and family business were downloaded and reviewed in this book chapter. 16 articles that made some reference to male gender issues, such as a link between fathers and sons, were excluded from the further analysis, as they did not address gender aspects within this relation. Surprisingly few articles have been published on gender issues in the two leading family business journals in the field, *Family Business Review* and *Journal of Family Business Strategy*. Only 10 articles in total with a clear focus on gender issues could be found in these journals published since 2006. Some publications on the relation of gender and family business can also be found in other established mainstream entrepreneurship and management journals, such as *Entrepreneurship Theory & Practice* or the *Journal of Small Business Management*. More attention to a range of different themes regarding the relation between gender and family business can be found in more niched, lower impact journals, such as the *International Journal of Gender and*

Entrepreneurship or the Journal of Family Business Management. For example, the former published a special issue on the theme in 2014, exploring the extent to which gendered processes are reinforced (or not) in family-business operations and dynamics (Al-Dajani et al., 2014).

## **Findings**

From our review of published research on the intersection of gender and family business, a number of themes emerged that will be discussed in the following. In addition, literature regarding two focused themes with a large number of publications, succession and copreneurship, is summarized in two tables below.

### *Succession*

The first key theme is that of succession. An overview of selected publications within this theme can be found in Table 1.

- Please insert Table 1 about here -

The articles addressing this theme typically follow one of three paths. The first path refers to articles discussing the choice or comparison between male or female successors, most of which employ gender merely as variable. For example, Ahrens, Landmann and Woywode (2015) study gender preferences in CEO succession of family firms. They find that in family firms with both genders among the predecessor's children, a male family successor is chosen in 82.1% of the cases, and the presence of sons significantly increases the probability of family succession. However, they also find that post-succession performance is reduced by 8% with male family succession, while it is increased by 7% with female family succession. The gender preference is confirmed by Schröder, Schmitt-Rodermund and Arnaud (2011), who find a paternal preference for boys to take over the family firm. In a study of Danish family businesses, Bennedsen et al. (2007) similarly find that the likelihood of deciding to appoint a family successor is significantly higher when the firstborn child is a boy. Haberman and Danes (2007), in one of the few articles using gender as a lens, compare power structures and interactions among family businesses with intergenerational management transition from father to son in one company and father to daughter in another company. They find women in the father-son business to experience feelings of exclusion and incidents of higher conflict among family members, while women in the father-daughter business experience feelings of inclusion, resulting in lower conflict. Koffi et al. (2014) take a different approach and instead investigate how male and female predecessors establish the legitimacy of their successors.

The second path covers articles studying aspects related to women and succession. For example, Overbeke, Bilimoria and Perelli (2013) study factors contributing to daughters' self-assessments regarding succession. They point out daughters' own blindness to the possibility of succession (resulting from automatically activated gender norms), and find that daughters may not deliberately consider succession until a critical event motivates them to do so. Gherardi and Perrotta (2016) and Meglio (2016) present case studies of daughters taking over the family business as well as different challenges related to that endeavor. Overall, only few studies focus on studying the linkage between women and succession in detail.

Conducting a literature review about the intersection between gender and family business not only captures the role of women in family businesses, but also publications in which the role of men is discussed more explicitly (i.e. beyond taking for granted that family businesses are run by and handed over to males). Thus, the third path of succession articles refers to studies comprising a clear male dimension. For example, in a conceptual paper Mussolino and Calabró (2014) discuss the impact of a paternalistic leadership style on succession (though without explicitly referring to the gender of successors). They propose that paternalism can intensify success or failure of succession in family firms, spurring a virtuous or vicious circle of behaviors. Zheng et al. (2016) propose that the equal division of assets among sons, typically discussed as diluting the family property, has positive aspects brought about by division and competition. Based on a case study from Hongkong, where no distinction is made between older and younger sons in the system of an equal division of property among the sons, they show how this practice encourages the (male) members of the family to develop their potential and compete with each other. In result, the authors claim that this practice enhances the drive for self-employment. Based on a sample of Korean family firms, Yoo et al. (2014) find support for the hypothesis that a non-first-son-based succession identity disproportionately better positions successors to take advantage of the informational exchange relationships and entrepreneurial opportunities, while simultaneously avoiding the pressures and constraints associated with 'family tradition' aspects of the family business system. Different types of father-son relationships are studied by Joshi and Srivastava (2014), Spraggon et al. (2012), Afghan (2012) and Laakkonen et al. (2011). The performance of blood-related sons versus other successors in Japan is discussed by Mehrotra et al. (2013). Chien (2014) highlights the possession of franchisor and spousal resources, and the importance of entrepreneurial orientation to foster and develop the franchisee performance in a couple-owned franchise outlet.

### *Copreneurship*

Another gender-related theme – that has emerged rather recently – is that of copreneurial couples (for an overview of selected publications, see Table 2). For example, Hedberg and Danes (2012) point at the foundational role of an inclusive power structure. In their study of farm-business couples they find that copreneurial businesses, where spouses are seen as equal partners engaging in collaborative power interactions, are likely to result in a more productive business-decision team. Similarly, in a qualitative study of copreneurial teams Deacon et al. (2014) find evidence of duties that could be stereotypically described as either 'men's work or women's work', but no apparent role tension between the partners. Thus, they conclude that no partner's contribution was deemed more valuable than the other.

- Please insert Table 2 about here -

Drawing on in-depth interviews, Cole and Johnson (2007) instead study successful postdivorce copreneurs. They identify as driving forces for successful postdivorce copreneurial relationships multiple intangible, emotional factors such as trust, the ability to compartmentalize, emotional connection, synergy, commitment to the business, and positive gender issues. Based on a large-scale quantitative study of European family businesses, Belenzon et al. (2016) find that married-owner family firms are managed more conservatively relative to firms with unrelated owners and even to other family-owned firms. In particular, they find that married-owner family firms invest and grow more slowly

and rely less on external finance. However, they also exhibit greater performance stability and higher profitability. Not all studies of copreneurs consider couples, some investigate ventures cofounded with other family members. Coad and Timmermans (2014), for example, find that newly founded family firms have lower employment growth, especially when formed with one's mother.

### *Performance*

Another theme emerging from the literature addresses the performance of family businesses, typically assessing that of women-led firms – though this aspect is often not at the core of the study. For example, in a study of the performance of small family firms, Cruz et al. (2012) find that women-led family businesses outperform other types of firms. Using a comprehensive data set of family-controlled firms in Italy, Amore et al. (2014) find that female directors significantly improve the operating profitability of female-led companies. The authors also show how the positive effect of female interactions on profitability is reduced when the firm is located in geographic areas characterized by gender prejudices and when the firm is large. In a study examining the impact of federal disaster assistance on the survival and success of small family-owned businesses, Haynes et al. (2012) find that women-led family businesses are most likely to succeed. Similarly, for companies facing natural disasters Danes et al. (2009) find higher levels of federal disaster assistance to be associated with lower family-firm resilience for male-owned businesses and higher family-firm resilience for female-owned businesses. Danes et al. (2007) investigate whether the gender of family-business owners moderates the relationship between various business-management practices and performance. Among other things, they find that introducing new production methods has a large positive effect on performance for both genders. Personnel management practices have a nine-times greater effect on performance for female than male owners. Comparing the performance of women-led family firms with women-led non-family firms, however, Kickul et al. (2010) find that being a family business is not a critical factor in the performance of women-led firms. Gill et al. (2014a) investigate factors that affect the growth of family business in Western Canada. They find that male respondents perceive family-business growth to be positively associated with board size, firm size, management skills, and experience. Female respondents, in contrast, perceive family-business growth to be positively associated with CEO duality, management skills, and family size.

### *Female managers in family firms*

The next theme emerging from the literature review addresses female managers, often comparing their management practices and/or performance between family- and non-family firms. Rodríguez-Ariza et al. (2017) compare the role of female directors in family and non-family firms in promoting responsible practices. They find that in family firms, corporate social responsibility (CSR) commitment does not vary significantly with the presence of female directors, as the latter tend to behave in accordance with the family orientation toward CSR. However, Peake et al. (2015) find support that gender moderates the relationship between community duration and satisfaction and measures of CSR. Meroño-Cerdán and López-Nicolás (2017) find that family firms run by women are not smaller, but are concentrated in the services sector like non-family firms. They conclude that gender differences in the type of business and in the manager profile found in general management literature disappear in family firms, and that only a sectoral gender effect persists. Nekhili et al. (2016) find that family firms, which are more conducive to transformational leadership, offer women a more appropriate climate for exercising the

function of Chair than that of CEO. In contrast, they find women CEOs to perform better in non-family firms. Vadnjaj and Zupan (2011) explore women as managers in family businesses, attempting to explain why women tend to find it attractive and rewarding to work for family businesses, although their contributions to business decisions often remain invisible. They explore attitudes held by men and women regarding the roles of women in relation to managerial and ownership issues and find support for a paradigm of a feminine style of management.

#### *Women on the board of family businesses*

The impact of having female members on the board of family businesses is investigated in a number of studies. Sundarasan et al. (2016) examine the effect of board composition on corporate social responsibility (CSR) in Malaysia and find that women on the board indicate a positive relationship, and more so in family firms. Bianco et al. (2015) investigate female representation on Italian corporate boards before the introduction of gender-quota legislation in 2012. They identify two different models. In the majority of gender-diverse boards, at least one woman had a family connection to the controlling shareholder. Family-affiliated women are more common in companies that are small, have a concentrated ownership, are in the consumer sector, and have a larger board. Conversely, non-family-affiliated women are more common on the boards of companies that are widely held, have younger and more educated boards, have a higher proportion of independent directors, and have a smaller number of interlocked directors. In addition, the number of board meetings appears to be negatively correlated to both the presence of family members and female directors; moreover, women show lower attendance than men at board meetings. Mínguez-Vera and Martín (2011) analyze the gender diversity of a sample of Spanish small and medium-sized enterprises. For this sample, they find that women's presence on boards generates a negative impact on firm performance, which they attribute to less risky strategies implemented by women directors. This study also finds that family firms and firms with a financial institution as the main shareholder tend to have more women on the board, and that firms with less debt, more assets, and larger boards have more women as directors.

#### *Historical studies of women in family businesses*

We found several publications that report on studies of women in family businesses from a historical perspective. Nordlund Edvinsson (2016) investigates the role of wives in the Swedish business elite in the early 1900s. She finds that the corporate wife was expected to perform duties linked to the family business. However, to get more directly involved in the firm, the husband had to give his permission. Yet, by offering support, the wife could gain tacit knowledge of her husband's work. Her emotional efforts influenced the achievements of the family business, and sometimes even its survival. Rutterford and Maltby (2006) summarize the evidence for women as financial investors in the UK before the twentieth century, investing for income, capital growth, or a share in the family business, and discuss why their participation until recently has been largely ignored by scholars. Using data on self-employment as an indicator of entrepreneurship, Honeyman (2009) argues that for centuries women in Britain have been instrumental as partners in or originators of business, but that the nature and impact of their commercial acumen has been seriously under-reported. She identifies and explores three dimensions of women's interaction with 20th-century businesses, namely their specific contribution to business activity; the barriers to such activity; and the way in which business historians have understood or interpreted women's commercial engagement. She concludes that through

their business activities women made a significant contribution to the expansion of the commercial sector in Britain during the second half of the 20th century.

Tweeddale (2013) explores the development of the cutlery industry in Sheffield/UK during the 19<sup>th</sup> century, where the family was largely synonymous with the firm. The author proposes that businesses drew their strength mainly from individual family skills, within the essentially craft-based industry. The backstreet nature of most cutlery enterprises enabled women (and children) to play a key role in both the home and factory - sometimes providing additional support through their involvement in the beer houses and shops that many families operated as a second enterprise. Companies often formed miniature family dynasties, reflecting a father-to-son nature of the trade and the connectedness (sometimes through marriage) with other families. Muñoz and Pérez (2007) discuss how structural changes during the past two centuries shaped Spanish women's economic activity in firms, family businesses, and self-employment, reflecting women's adaptation to a social system that assigned gender-specific roles and rights. They explain how especially the shift to a democratic system in Spain during the 1970s paved the way for women to enter public and private firms as professionals. As a result, more women became self-employed or helped to run family businesses – mainly related to tourism, the hotel and restaurant industries, design, fashion, and the arts.

#### *Gender as a side aspect of family business studies*

In several publications, gender issues are not really in focus, but appear as side aspects (e.g. Gill, 2013; Gill et al., 2014; Smith, 2009; van der Merwe, 2009 a, 2009b, 2010), for example as 'attitude variable' in Fahed-Sreih and Djoundourian's (2006) study of Lebanese family firms. In their study, more than 75% of the family firms considered female ownership acceptable and 67.9% state that they would consider a female as a potential CEO. Other studies include gender as a control variable or as one of several variables forming a construct (Vandebeek et al., 2016). Rubino et al. (2016) compare board characteristics in family and non-family firms and find that gender diversity has a negative impact on the firm value when a member of the family leads a family firm. Studying the influence of CEOs on family firms' internationalization, Ramón-Llorens et al. (2017) find that gender does not significantly predict the propensity to export.

#### *Gender as variable in studies assessing a family-business background*

Ten publications report on studies in which a family-business background and gender are included as variables. Typically, these studies investigate (social) entrepreneurial intentions or more generally career intentions of students or adolescents (Hadjimanolis & Poutziouris, 2011; Harris & Gibson, 2008; Levie & Hart, 2011; Mohamad et al., 2014; Schröder et al., 2011; Shirokova et al., 2016; White et al., 2007). For example, Hoffmann et al. (2015) study reasons for the likelihood that children of self-employed parents are more likely to become self-employed themselves, and find that the effect of a self-employed father (mother) is much higher for males (females), even if not taking over the family business. In an international comparative study, Robinson and Stubberud (2012) find that that in several countries more women than men state that a family business background was a motive for entrepreneurship. An interesting variation of these studies is provided by Block et al. (2016) who explore who prefers to work for family businesses rather than non-family firms, and find that i.a. a preference to work in family firms correlates positively with being female.



### *Studies with a focus on the link between gender and family business*

We also identified a number of studies in which the link between gender and family business was the main topic of the research. Aygören and Nordqvist (2015) provide a framework of identity work in family businesses with particular focus on two specific habitats of meaning: gender and ethnicity. They show that the distinctive forms of formation and management of plural identities in family firms, and that the two habitats of meaning - gender and ethnicity - prove to be fundamental in organizing and performing in the family business context. Identities of women in family businesses are also in focus in Smith's (2014) work. Based on the sociological theory of matriarchy, she suggests a theoretical framework which is tested against narratives of matriarchal figures written up using retrospective ethnography. These stories illustrate how gender differences impact entrepreneurial identities and the everyday practicalities of doing business. While the male head of the family may be the titular business owner, many privately defer to the matriarchal voice which acts as a positive driving force in business, binding a family together. This study can help to explain how gendered relationships influence entrepreneurial identities and open our eyes as to how we narrate stories of women in family business. Bjursell and Melin (2011) offer a perspective on entrepreneurial identity as narrative construction, emerging in stories about entering the family business. Based on an interpretative analysis of narrative interviews with women from Swedish family businesses, they present two distinct narratives: The "Pippi Longstocking" narrative illustrates conscious choices, drive and motivation based on an entrepreneurial identification, while the "Alice in Wonderland" narrative illustrates women who happen to become entrepreneurs or business persons because the family business was there. The contrasting and complementing narratives illustrate ambiguities in the identity process. Also drawing on narratives, Hamilton (2006) illuminates complex relationships in a family-business context, putting the family at the heart of the research (as opposed to an individual owner-manager), drawing on narrative accounts as told by the founders and by the succeeding generation in three family businesses. While some literature conceptualizes women in family business as marginalized through the forces of patriarchy or paternalism, the narratives presented in this study point to alternative gender discourses and practices, and to evidence of clear resistance to patriarchy. In so doing it identifies conditions under which patriarchy might be challenged in family businesses.

Based on a social constructivist analysis of the accounts of women regarding their influence in family businesses, Heinonen and Stenholm (2011) aim to gain a deeper understanding of the contribution of women to family business from the perspective of the women themselves. They find that women perceive themselves to be vital for the functioning of the family business. Their closeness to the business and contribution seem to go hand in hand, independent on the formal ownership. The authors discuss how formal and visible ownership remain in the background when women define their contribution, indicating that psychological ownership is important for understanding women's contribution to the family business. Their results suggest that the woman herself does not belittle her contribution and recognizes her own ways of exerting an influence.

A critical assessment of the complexity inherent in gendering processes in family businesses is provided by Katila (2010) who explores how Chinese business families in the Chinese catering sector in Helsinki articulate gendered and ethnicized moral orders. The study suggests that families do not necessarily adhere to patriarchal arrangements of gender in their everyday life and that commitment or resistance to the gendered familial

moral orders can be seen as an act of ethnic identification. Barrett and Moores (2009) explore how women exercise leadership and entrepreneurship in family firms. Using frameworks which avoid essentialist assumptions about women's and men's approach to leadership, they suggest that there are some characteristic ways in which women leaders learn family-business leadership and entrepreneurship roles. The authors label these ways as 'stumbling into the spotlight', 'building your own stage', 'directing the spotlight elsewhere', and 'coping with shadows'. The journey of those who had failed to attain leadership was labelled 'becoming invisible'. The same authors (Barrett and Moores, 2009b) also wrote a somewhat more practitioner-oriented book about leadership roles of women in family businesses.

While most studies in this theme use qualitative methods, some quantitative studies can be found that investigate the link between gender and family businesses. In a study of the role played by culture and gender differences in family business across ten countries based on Global Entrepreneurship Monitor (GEM) data, Lerner and Malach-Pines (2011) find consistently big cross-cultural differences between the owners of family businesses in the ten countries and far smaller and less consistent differences between male and female owners of family businesses. These findings offer a strong support for the usefulness of social theories of gender to better understand gender aspects related to family firms. In a six-country study, Sonfield and Lussier (2009) similarly find no significant relationships between the gender of family business owner-managers and ten management characteristic variables in a sample of 593 family businesses. Another quantitative study by Mohavedi et al. (2016) identifies barriers associated with the development of rural women's family businesses in Iran. The most pressing barriers faced by rural women's family businesses are low ability of the women in creativity and innovation as well as low income-generating of the family businesses. The authors categorize the barriers into five groups including supportive and logistic barriers, managerial and monitoring barriers, individual and family barriers, skill and expertise barriers, and communication and information barriers.

While studies depicting male owner-managers as 'heroes' are common in family-business studies (see Pauli, 2015), corresponding studies illustrating women's achievements are rare. Carvalho and Williams (2014) explore the case of the growth and internationalization of a traditional family business in Portugal, originally producing cork but facing an industry crisis. Then a young woman entrepreneur introduces significant changes to the business to modernize it, develops a brand and focuses on product diversification and innovation, paving the road to growth. Refreshingly, the business-related achievements of this woman in the family firm, rather than her personal attributes, are brought to the fore.

Finally, one theme emerging in this literature represents examples of women in family firms in different types of country contexts – to name but a few, Welsh (2016) discusses women-owned family businesses in sub-Saharan Africa, Yuldinawati and Oktadanio (2016) Indonesian family businesses, and Byrne and Fattoum (2014) case studies from France. Welsh et al. (2014) investigate the characteristics of Japanese women entrepreneurs and their family firms, and identify barriers and resources that affect their success. They find a customized long-term support system with strong connections between family business supporters and women business owners by both the governmental and private agencies to be important for further growth of Japanese women entrepreneurs. Vadnjal and Zupan (2013) study women in family firms in Slovenia, arguing that as women in Slovenia have reached a high level of equality in education as well as

employment it could be expected that they also play a crucial role in family firms. Instead, the authors find that women's contribution seems to be underestimated and undervalued due to the conservative, more patriarchic tradition in these firms and that thus the full potential of women is still not well utilized. The key drivers for women's active involvement in family businesses in Turkey, their contribution and the challenges they face are studied by Karataş-Özkan et al. (2011), highlighting the importance of cultural dynamics. Investigating the influences of Colombian women's participation in family businesses, Vergara et al. (2011) identify a range of internal factors (namely protection of personal wealth, professional development, and the conservation of family unity), and transcendent factors (namely contribution to the growth of the business, generation of opportunities for family communication) as most important for motivating women's participation. In contrast, external factors (such as family conflict, work-family imbalances and the definition of a career plan) discourage participation. The authors conclude that family firms must improve their work with these external factors to avoid the loss of talent and professional commitment of women. Finally, Jones (2008) argues that many Indian companies have to cope with the problem of incompetent family members at the top of businesses. Due to increasing competitive pressures, the insight is emerging that company success depends on their attitude towards men and women of high ability and advanced training. The author notes that women have often found more potential in Indian family businesses, and that more women have gained prominence in family-run businesses as compared to non-family firms.

#### *Gender theories and family business*

Only few studies explicitly theorize about the gender dimension in relation to family business studies, some of these have already been mentioned above. For example, Barrett (2014) discusses women's entrepreneurship in the family-firm context based on radical subjectivist economics and suggests that the elements of entrepreneurial imagination, empathy, modularity and self-organization generate new research questions which contest previous apparently settled views about women entrepreneurs. Therefore, protocols for investigating these questions are suggested by the author, touching also on the potential for women entrepreneurs to create new industries. Another noteworthy exception is Rothausen (2009) who discusses the gendering of family and work roles in family businesses. Bjursell and Bäckvall (2011) analyze the role ascribed to women in family businesses in Swedish print media. They find a tension between women's roles as mothers and in business. While the role of mothers is largely unproblematic as such, their role in business is seen as more ambivalent, requiring to make sense of what a business women is and as an expression of that women are not the norm in family business. Here, it is interesting to note that whilst these questions have not yet been systematically explored in family-business research, they are currently discussed in women's entrepreneurship research.

#### **Discussion and ways forward**

Our literature review has shown that a link between gender and family business can be found in a substantial number of studies. Categorizing this literature into different themes, however, makes evident that the family-business field is in dire need of more research that questions our taken-for-granted assumptions on the role of gender in family business, and in particular of work that goes beyond considering gender as a (control) variable for biological sex, or as a problem that concerns women only.

Earlier research had centered around obstacles and difficulties as well as on opportunities and advantages of women in family business (Martinez Jimenez, 2009), and our literature review shows that additional themes have emerged to complement this earlier research. Yet, a number of gaps remain and in the following we propose different approaches that could advance research on the interface between gender and family firms.

### *Gender theories*

Although the relevance of women for family businesses is gaining increasing scholarly attention, surprisingly few studies make use of gender theories to better understand the social construction of gendering in family businesses. Both, work and family roles in our society are predicated on gender expectations (Rothausen, 2009): The particularly strong gendering associated with family pertains to the social ideals of ‘femininity’ as mother, daughter and wife and the social ideals of ‘masculinity’ are reflected in the ideal father, husband or brother. The expectations of the ‘ideal worker’ follow these norms and are described by ‘masculine’ characteristics, such as being assertive, competitive, and rational, while ‘feminine’ characteristics match expectations on the ideal ‘care giver’ as being emphatic, sensitive and a good listener. Gender theories could help explain the gendered nature of family businesses and the dynamics between family and its business, which might hinder women to progress, force them to assimilate to a predominately male organization (cf. Acker, 1992), but even support them in their roles. In family businesses, where family and business systems overlap, a better understanding of gender-role dynamics across generations could be achieved by applying a gender-theory lens.

### *Socialization theory*

Gender roles are deeply rooted in societal structures, which makes them difficult to change. Moreover, their taken-for-granted nature makes them difficult to identify. Socialization theory can help explicate their invisible nature. Socialization is ‘the process whereby the helpless infant gradually becomes a self-aware, knowledgeable person, skilled in the ways of the culture into which she or he is born’ (Giddens, 1993: 60). It begins with the infant assimilating the world of its closest caregivers (Berger & Luckmann, 1966). As the child interacts with family members, it unconsciously adopts the values, norms and doings of the family. Our socialization forms the basis from which we make sense of our lives; and it constitutes our background coping skills that we automatically draw on to deal with unfamiliar situations (Chia, 2004). At later stages in life other socializing agents, such as colleagues at work, play important roles in the further shaping of our identity. A fundamental part of socialization, ingrained since infancy, is the learning of gender roles (Suar & Gochhayat, 2016). These roles have been segmented over centuries into what is considered as appropriate ‘male’ versus ‘female’ behavior.

An example of fruitfully employing this perspective to family-business research is Iannarelli (1992), who explores the socialization of leaders in family business from a gender perspective. Her research shows that family firms are unique settings, where family and business socialization coincide and constitute lifelong learning processes where also the business values are learned since early childhood. Different expectations are put on the children depending on their sex. She finds that sons in business families generally get to spend more time at the business, developing ‘natural abilities’ and are seen as ‘leadership material’, while daughters are expected to take on more domestic chores and develop caregiving abilities (Iannarelli, 1992). Creating awareness of these unintentional patterns is important for family-business management and succession to advance. Socialization

theory can help explain inequality in the working life as stemming from deeply ingrained practices that are unconsciously transmitted over generations and embedded in local context.

### *Interpretivist methodologies*

Increased awareness of gendering behavior and gendered systems is an important step towards achieving change. The implicit nature of how gender roles are socially constructed, however, cause some challenges for researching them. The difficulty to explicate gender dynamics calls for methods that acknowledge the indirect and inconspicuous nature of everyday practice. Such methods are found in interpretivist methodologies. In family-business research, interpretivism remain largely underutilized and are rarely published in the leading family-business journals (cf. Nordqvist et al., 2009). Even case studies are often based on positivist assumptions, according a recent review (Leppäaho et al., 2016). Hence, acknowledging that gender is socially constructed implies the need to choose suitable methods. Other methodologies can eventually contribute, but a priori a solid explorative building of theory is needed. It is not until concepts have been developed that constructs can be validated (Gioia et al., 2013). To this end, interpretivism holds great promise to contribute to the *why* and *how* questions of the link between gender and family business. Among appropriate methods for theory building from interpretive fieldwork we particularly suggest longitudinal, in-depth single-case studies (Stake, 1991), the “Gioia methodology” for grounded-theory development (Gioia et al., 2013), ethnography (van Maanen, 1988; 2011) and theorizing from process data (Langley, 1999). Moreover, the implicit nature of gender roles necessitate to go beyond interviews as the sole data-collection technique. Here, narratives (Dawson & Hjort, 2012), shadowing (Czarniawska, 2007) and other observation-based techniques hold merit to capture the implicit nature of family-business life.

### *Context*

Gender roles are culturally defined and hence differ between societies (Acker, 1992). Research acknowledging contextual differences is therefore important for advancing knowledge about the link between gender and family businesses. Gender has different meanings in different settings and are thus ideally studied with research designs that account for context. The above proposed methods are well suited for that task.

Context refers to ‘circumstances, conditions, situations, or environments that are external to the respective phenomenon and enable or constrain it’ (Welter, 2011: 167). The business, social, spatial, and institutional dimensions of context all affect the meaning of gender in family business. It includes both distal contexts, such as countries, political systems or society, as well as more proximate contexts, such as the social environment or the local neighborhood of the family business (cf. Welter, 2011). Particular to the family-business context is the inevitable interplay between family and business realms. The impact of place on the role of gender in family businesses could be captured through a feminist-geography perspective that draws on feminist theories to explore how gender and geographies are mutually structured and transformed (Berg, 1997). A contextualized view of the interplay between gender and family business can contribute to developing a deeper and more fine-grained understanding of the phenomenon.

### *A call for a gendered view of family businesses*

There is still a dearth of studies that apply a gender lens to family-business dynamics or investigate how gender orders in societies impact family businesses. Most publications do not make explicit use of gender theories to explain these issues. We conclude this review by suggesting that research on gender and family businesses needs to pay more attention to gendered structures instead of interpreting gender as an individualistic – good or bad - characteristic of women alone. In other words, we replicate a call that has been made for research on women’s entrepreneurship (Ahl, 2006; Hughes et al., 2012) and encourage research that moves towards a focus on social and other contextualized gendered structures that explain gendered outcomes. Relevant research could, for example, take a closer look into how gender of both men and women is constructed and legitimized by families and family businesses and whether and how this can be changed through individual or family agency. Such research would be of great value not only to the family business research field, but to entrepreneurship research in general (see Baker & Welter, 2017).

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Table 1: Overview of selected publications on succession

<b>Author(s) (year)</b>	<b>Main research question/aim</b>	<b>Theoretical background</b>	<b>Type of study</b>	<b>Main finding</b>
Gherardi & Perrotta (2016)	Explore gender and legitimacy in FB succession	Adding a gender dimension to French pragmatist sociology	Case studies of Italian SMEs with daughters taking over	Shows how daughters' perceived gender inequality in the succession process is justified and how the justification work and the production of legitimacy are accomplished, shifting from one order of worth to the other
Meglio (2016)	Offer alternative understanding of intergenerational transition process through a temporal lens	Time as theoretical focus	Single case of father-daughter succession in small FB	Highlights how one possible source of conflict between father and daughter is their different use of and meanings attached to time
Matthew (2016)	What are the key characteristics, challenges and chauvinism toward females for family business succession?	N/A	Case study in Asia	The results reject the general assumption "that selection of successor is based on gender rather than capabilities and skills and women are less competent to take an entrepreneurial role as successor of the family business".
Liu (2015)	Descriptive case study of FB development	N/A	Single case study of development of a family business over time	Due to illness of the founder, his wife takes over and successfully develops the business, and also brings in their son. Reaching retirement age, she needs to decide whether the son should take over.
Cicellin et al. (2015)	Examines the impact of paternalistic leadership on the gender diversity of family firm succession	Paternalism	Conceptual	Conceptual model that considers different types of paternalistic leadership styles as factors that increase or decrease the likelihood of success of the succession, according to the gender of the successor
Ahrens et al. (2015)	What are the gender preferences for CEO succession in FBs?	Contest theory; agency theory; human capital	Quantitative study of 804 successions in non-publicly listed	If both genders are represented among predecessors, males are chosen in 81.2% of the cases; presence of sons significantly



			German family firms between 2002 and 2008	increases probability of family succession; female family successors equipped with significantly higher levels of human capital; post-succession performance is reduced by 8% in male succession, and increased by 7% after female succession
Tong (2014)	Explore the drawbacks of Asian business networking	Guanxi	Case studies of 3 Chinese FBs	Shows how family disputes involving wives, secondary wives, and daughters-in-law and sibling rivalries can lead to issues of conflicts and inheritance after the demise of the founding patriarch.
Glover (2014)	Present a case example of the power struggles and gender issues one daughter faced when she became a partner, and future successor, in the family business	N/A	Ethnographic study of a small family farm in England	Results shed light on some of the social complexities of small family farms and power struggles within the family exacerbated by perceived gender issues. The work also highlights the potential threat to the daughter's position as a partner, from her father's favouritism of male employees
Koffi et al. (2014)	How do owner-managers influence the success of the generational transition by facilitating the credibility of the successor in the eyes of the employees?	N/A	7 case studies of succession	Men and women business owners adopt different behavioral strategies in order to bring credibility to their successors
Overbeke et al. (2013)	Which factors contribute to daughters' self-assessments of succession?	Theory of planned behavior; gender role theory	Interviews with 21 daughters and sons in the USA	Gender norms make daughters blind to the possibility of succession; daughters may not deliberately consider succession until a critical event motivates them to do so; parental support and mentoring for leadership are seen to facilitate daughter succession

Halkias et al. (2010)	Investigate the trend for daughters in Asian FBs to take over leadership roles from their fathers in the FB and what might hinder or support a daughter's intentions to succeed her father in the FB	N/A	Survey of 30 female students of a university in UAE about their intentions	Females do not feel comfortable working with family members, are willing to take the risk to pursue a career outside the FB
Haberman & Danes (2007)	Investigate power structures and interactions among father-daughter and father-son family business decision teams experiencing management transfer	Family FIRO model	Two case studies	Women in the father-son business to experience feelings of exclusion and incidents of higher conflict among family members, while women in the father-daughter business experienced feelings of inclusion, resulting in lower conflict.
Pyromalis et al. (2006)	Investigate whether the success of the succession and satisfaction from the process per se depends on the successor's gender	Succession literature	Analytical Hierarchy Process of prior publications	The success of the succession process does not depend on the gender of the successor

Table 2: Overview of selected studies on copreneurs

<b>Author(s) (year)</b>	<b>Main research question/aim</b>	<b>Theoretical background</b>	<b>Type of study</b>	<b>Main finding</b>
Belenzon et al. (2016)	How does the social context of owners affect firm strategy and performance?	Embeddedness theory; institutional logics	Quantitative study of large sample of private firms across Europe	Social relationships among owners have a large impact on firm strategy and performance
Kuschel & Lepeley (2016)	Address issues related to women as leaders in copreneurial tech ventures and analyse whether these ventures are growth-oriented or conform to limited partnerships aimed primarily to meet their living standards	N/A	Interviews with three copreneurial women and two divorced copreneurs	Copreneurial teams that work in the technology industry have similar and complementary levels of education and skills development. Working together, each partner becomes well aware of mutual skills and strengths. This allows them to define their respective roles. Both divide work and family, and have developed a level of mutual trust and commitment that is essential to move forward. Commonly they show workaholic tendencies with a high rational underpinning.
Deacon et al. (2014)	Gain insights into the division of labor, capitals and capacities and gendered identities within husband and wife heterosexual copreneurial businesses	Gender and entrepreneurship theories	Multiple exploratory interview approach	Entrepreneurial identity and roles and responsibilities within a copreneurial business are shared and complementary, and are dependent upon the unique capacities and capitals of each partner. While there is evidence of duties that could be stereotypically described as either “men’s work or women’s work”, there was no apparent role tension between the partners. Thus, no partner’s contribution was deemed more valuable than the other.

Coad & Timmermans (2014)	Explore the effects of diverse team composition on the survival and growth of new ventures	Team composition literature	Analysis of Danish Linked Employer-Employee database	Family firms have lower employment growth, especially when formed with one's mother.
Brannon et al. (2014)	What are the implications of two types of family relationships (romantic couples vs biologically linked teams) in the formative stages of new venture creation?	Social identity theory	Longitudinal sample of 295 nascent teams	The effects on start-up performance in terms of achieving first sales differ in that couples are more likely than other teams to achieve first sales, while the opposite is true for blood-related teams
Hedberg & Danes (2012)	Examine the dynamic power processes within copreneurial couples as a bridge between entrepreneurship and family firm research	Literature on power processes	Multiple methods (self-reports, observational coding of team interviews, and analytic induction with team and individual interviews)	Findings illustrate the foundational role of an inclusive power structure and suggest that copreneurial businesses where spouses are seen as equal partners engaging in collaborative power interactions are likely to result in a more productive business decision team that has the resilience to creatively solve important business problems
Farrington et al. (2011)	Empirically assess the influence of selected structural-based factors on the effectiveness of South African copreneurships	Teamwork literature	380 questionnaires completed by individual spouses	Results suggest that the success of a marriage between copreneurs is not influenced by the success of the business, but that the more structural elements such as leadership, needs alignment and role clarity are in place, the more satisfied the spouses are likely to be with both their business and their marital relationship
Fletcher (2010)	Explore the ways in which venture creation is constructed between co-habiting couples	Family business literature, entrepreneurship	26 co-preneurial situations	A typology of co-preneurship is developed, using ownership and management structural dimensions. This typology is illustrated with different types of lifestyle businesses to demonstrate the economic assessments and

				'market work' that give rise to family entrepreneurship.
Bensemam & Hall (2010)	Explore the experiences of owners of rural tourism accommodation businesses in New Zealand to examine roles within copreneurial rural tourism businesses	N/A	Mixed method (quantitative survey and qualitative)	Finds the sector to be characterised by lifestylers and copreneurs running their businesses as a “hobby” and that non-economic, lifestyle motivations are important stimuli to business formation; any perception of copreneurship as a tool for enabling women to become freed from traditional gender roles may not equal the reality as a gendered ideology persists even through copreneurial relationships in rural tourism. Copreneurial couples appear to engage in running their business using traditional gender-based roles mirroring those found in the private home.
Blenkinsopp & Owens (2010)	Aims to develop an expanded conceptualisation of copreneurship, locating it within the family embeddedness perspective on entrepreneurship.	Entrepreneurship and family business literatures	Conceptual	Copreneurship clearly represents an important phenomenon, and the role of spousal support in entrepreneurship is being identified as particularly significant.
Werbel & Danes (2010)	Investigate the degree that the spouse of the founder of a new venture is a constraint on that process.	Human and social capital	Quantitative study of 110 new ventures	The results suggest that when a spouse experiences work-family conflict, a spouse is likely to be a resource constraint that creates physiological strain on the founder. Furthermore, spousal commitment to the venture is likely to exacerbate this relationship.

Wu et al. (2010)	Examine the permeability of work and family domains, and to investigate the relationships of work-family conflict with business and marriage outcomes in copreneurial women	work-family management strategies	202 Taiwanese copreneurial women	Family boundaries were found to be more permeable than work domains; work-family conflict is found to be negatively related to perceived business success and marriage satisfaction; and work-to-family conflict was found to predict marriage satisfaction, whereas family-to-work conflict predicted perceived business success
Cole & Johnson (2007)	How are separated or divorced copreneurs able to end their marital relationship but maintain their business together?	Copreneurship literature	Nine couples (18 adult men and women), who work together in a first-generation family business after a divorce or separation	Finds that copreneurs who have a great deal of trust in one another can continue to work together postdivorce. Emotional connection, compartmentalization, synergy, commitment to the business, and positive gender issues also contribute to the success of the business and the business relationship.
O'Connor et al. (2006)	Purpose is to discuss the nature of co-entrepreneurs within the ICT sector in Ireland	Literature review	23 copreneurial ventures in Ireland	The findings of the study indicate that the family business or spouse/partner structure represents a major component of mixed gender companies in the ICT sector in Ireland, and that such companies tend to be small, with well-educated and experienced founders.
Muske & Fitzgerald (2006)	Examine continuance in copreneurial business relationships	Literature review	Data from the 1997 and 2000 panels of the National Family Business Survey	Findings indicate that those starting copreneurial business relationships were more likely to be older, more educated, and running larger, more successful businesses. Those who discontinued the copreneurial business relationship during the three years of the survey had lower levels of education and success, both financially and in terms of

				number of people employed, than the other groups.
Larsen (2006)	Provide insights in how vertical and horizontal sex segregation may develop in family businesses	Occupational sex segregation literature	Individual family businesses in American harness horse racing	The findings show how the belief that married couples cannot debate and resolve work-related conflicts without undue strain on their personal relationship leads some of these couples to organize their work into gendered tasks and workspaces, contributing to the maintenance of vertical segregation in the trainer position.
Van Auken & Werbel (2006)	What is the degree to which one's spouse shares a common vision about the goals, risks, and rewards of the business?	Literature review	Conceptual	Models and testable hypotheses are developed to guide empirical research on the antecedents and consequences of spousal commitment to a family business.