Family-driven innovation: A multilevel investigation of contingency factors for innovation strategy

Abstract

This paper explores the drivers of innovation in family firms. Using contingency theory as our theoretical lens, we investigate how contingency factors (‘where’, ‘how’, and ‘what’) relate to the development of innovation strategies, and how family firm idiosyncrasies affect the development of these innovation strategies. Using four multi-generational family firm case studies, the data collection consisted of 21 interviews and 1,496 items of archival data. We identify five specific elements of family firm innovation strategies (vision and culture alignment, generational approaches, change strategy, future orientation, and shared decision-making). We show how innovation strategy in family firms is contingent on three factors: ‘Where’: willingness to innovate; ‘How’: structures and processes needed to innovate; and ‘What’: capabilities and resources needed to innovate, and that these are influenced by idiosyncratic characteristics of family firms (familiness, founder influence, and succession).

Keywords: family firms; family-driven innovation; innovation strategy; contingency theory

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Introduction

Idiosyncratic characteristics of a family firm are a driver of innovation strategy (De Massis *et al.*, 2015a; Nguyen *et al.,* 2024). In family firms, innovation strategy may be driven by a number of factors, including familiness, defined as “the unique bundle of resources a particular firm has because of the systems interaction between the family, its individual members, and the business” (Habbershon and Williams, 1999, 11); family risk-taking propensity (Fries *et al.,* 2021; Jocic *et al.,* 2023); the ability of the firm to switch between ‘normal’ and ‘innovation’ tasks (Broekaert *et al.*, 2016); and the concentration of ownership in the family (Chrisman *et al.,* 2015). Family involvement in ownership affects how both open innovation and technological innovation activities are enacted (De Massis *et al.*, 2012), where open innovation is sourcing innovation from internal and external sources, and technological innovation is new or improved product/process whose technological characteristics are significantly different from before.

The idiosyncratic characteristics of familiness include family level of involvement in firm governance, economic goals, and non-economic goals (Chrisman *et al.,* 2015). Other idiosyncratic characteristics that define family-driven innovation include legacy (Erdogan *et al.*, 2020); family firm image (Arzubiaga *et al.,* 2019): freedoms in goal selection (Williams *et al.*, 2019); non-economic goals and social capital (Casprini *et al.,* 2017): and family control and wealth concentration (Duran *et al.*, 2016). However, in reality, the exact nature of these idiosyncrasies is context-specific to the unique dynamics of each individual family firm. Ultimately, it is this uniqueness of both resources, as well as idiosyncrasies, that may establish an ostensibly positive link between implementation and innovation outcomes in family firms (Filser *et al.,* 2016). Though, some research studies question whether or not family involvement has a positive or negative impact on innovation-related outcomes (Bammens *et al.,* 2015), with some family business scholars concluding that the effects of family involvement on driving innovation outputs are still largely inconclusive (Fahed-Sreih and El-Kassar, 2017).

Despite the current understanding of family-driven innovation within the context of family firm idiosyncrasies and comparisons with non-family counterparts (e.g., Arzubiaga *et al.*, 2019; Calabrò *et al.*, 2019; De Massis *et al.*, 2015a), there remains a lack of theoretical congruity between the family-driven mechanisms of innovation within family firms (i.e., individual/family-level idiosyncratic characteristics that drive innovation) and the strategic mechanisms (i.e., firm-level innovation strategies) (Basco, 2014). There remain significant gaps in research and knowledge regarding the factors on which successful innovation implementation in family firms is contingent (Calabrò *et al.*, 2019; Huang and Ichikohji, 2022), and these include how family firms align their innovation activities with their cultural ethos; how generational approaches can shift family firms towards more proactive approaches to innovation; how a family firm's internal growth and external customer base affect its change strategy; how family firms approach future orientation of innovation investment and the extent to which family firms strive for innovation as a team effort.

In this paper, we draw on contingency theory and seek to advance the theoretical foundations of the work of De Massis *et al.*, (2015a), building on Kellermanns *et al.*, (2012, 96) argument that "[t]he idiosyncratic traits of the family must be considered in conjunction with other contingencies to fully understand family firm behavior". Contingency theory is an appropriate theoretical lens for exploring the relationship between family-driven innovation and innovation strategy at multiple levels (individual, family and organization) in multi-generational family firms. A contingency perspective can account for 'the causal mechanisms that produce firm-level characteristics and behaviors, based on the characteristics, actions, and interactions of organizational members' (De Massis and Foss, 2018, 387).

Overall, the family business literature suggests that a more nuanced understanding of innovation drivers within family firms is required (Beck *et al.,* 2011; Broekaert *et al.*, 2016; Diaz-Moriana *et al.,* 2020), especially given the proclivity for family involvement to impact on key management facets such as technological innovation (De Massis *et al.,* 2012). As such, we investigate the following research questions: *How do innovation contingency factors ('where', 'how', and 'what') relate to the development of innovation strategies within family firms?* and *How are contingency factors, and their inherent relationships with innovation strategies, driven by the idiosyncratic characteristics of the family firm?*

We explore these questions through four case studies of multi-generational family firms because recent studies have shown that the potential transfer of resources, business skills and knowledge across generations can have profound consequences for innovation-related activities in family firms (Estrada-Robles *et al.*, 2020). Our decision to adopt a multilevel approach is motivated not only by how the family-driven and strategic aspects of innovation dictate different levels of analysis in family firms, but also by other similar empirical studies of multigenerational family firms that incorporate individual, family, and organizational levels of analysis (Hanson and Keplinger, 2020).

Our findings make the following contributions to current debates on innovation in family firms. First, we identify five specific elements of family firm innovation strategies (vision and culture alignment, generational approaches, change strategy, future orientation, and shared decision making), and we show how innovation mechanisms at the individual and family level relate to the development of innovation strategies at the organizational level and how family firms use adaptations of the 'problematization' innovation strategy and alternatives to stoppage-based innovation strategies. Second, we investigate the multilevel mechanisms of the relationship between three contingency factors ('where', 'how' and 'what') and innovation strategies in family firms and how this relationship is affected by the idiosyncratic characteristics of the family firm. Specifically, we contribute insights into how the key individual drivers of familiness, founder influence, and succession affect the factors that facilitate innovation strategies within these firms.

The remainder of the paper is structured as follows. The next section provides a critical review of innovation strategy and drivers within family firms and, through our analytical framing of contingency theory, will theorize family-driven innovation strategies. The methodology section details our chosen multiple case study research design and the analysis framework adopted in the study. The findings section presents the results, structured into the contingency factors from our chosen theoretical framework. The findings are then discussed and analyzed, and we conclude the paper by outlining our contributions and providing directions for future research.

Theoretical framing

Innovation drivers in family firms

The innovation paradox in family firms is that, despite family firms often having the means and motivation to innovate, family firms habitually invest less in innovation projects (Chrisman *et al.,* 2015; De Massis and Frattini, 2016; Duran *et al.,* 2016). Traditions and legacies in family firms can potentially have limiting effects on innovation drivers, such as the willingness to engage in innovation projects and risk taking (Diaz Moriana *et al.*, 2020; Erdogan *et al.*, 2020). Prior family business research indicates that family firms are unique in how their idiosyncratic attributes drive innovation (De Massis *et al.,* 2015a; Laforet, 2013) and how this translates into performance outcomes (Craig and Dibrell, 2006; Kraus *et al.,* 2018). Other studies suggest that innovation drivers are contextually significant relative to non-family firms (Chrisman *et al.,* 2015; Classen *et al.,* 2014) and when intra-organizational factors such as generational differentiation are considered (Filser *et al.*, 2016).

Chrisman *et al.* argue that this innovation paradox is complex and difficult to predict as ‘performance aspirations, environmental jolts, generational transfers, and a variety of yet-to-be studied factors can cause variations in innovation activities among family firms’ (2015, 312). Nevertheless, some family business scholars suggest a resolution for overcoming this innovation paradox – notably by investigating the firm’s tradition and that of its constituent territory (De Massis *et al.,* 2016; Erdogan *et al.,* 2020).

Innovation strategy

An innovation strategy is the way in which a firm develops and introduces new products or services into a market (Cai *et al.*, 2017), as part of strategic processes and managerial action (Shahriari and Mahmoudi-Mesineh, 2021). Some research suggests that specific innovation strategies are adopted by various organizations, including the seminal, yet still commonly-used, ‘problematization’ strategy (Callon, 1986) – which aims to create shared understandings by directing heterogeneous actors to work in the same direction (Morua and Marin, 2016). Another relatable approach to innovation strategy, as suggested by Salerno *et al.* (2015), is for management to incorporate stoppages into innovation processes, in order to mitigate against key uncertainties and the prospect of failure.

Much of the contemporary discourse on innovation strategy concentrates on how various broadly defined conceptualizations of these strategies are constructed in terms of R&D and design constituents (see Hewitt-Dundas and Roper, 2018) or how they relate to performance (Klarin and Sharmelly, 2019; Soetanto and Jack, 2016), rather than exploring the specific driving forces behind these strategies. However, as Love and Roper conclude, there are ‘few areas of agreement in terms of the best innovation strategies’ (2015, 33).

Idiosyncratic characteristics of family firms as innovation drivers

Family firms are inherently unique in how their idiosyncratic characteristics (i.e., those that differentiate family firms from non-family firms) drive innovation (De Massis *et al.,* 2015a), and how this translates to performance outcomes (Basco, 2014). Despite the potential for family firms to drive innovation, some authors maintain that they are less willing to do so on account of unforeseen factors (Chrisman *et al.*, 2015), as well as more predictable traits such as succeeding generation establishment (and thus more dependent on non-family managers and less on market niche innovativeness) (Fang *et al.*, 2017; Laforet, 2013). However, some research suggests that, rather than being less willing to drive innovation, family firms invest positively but less intensely in innovation than non-family firms due to complex and multi-faceted innovation investments (see, for example, Classen *et al.*, 2014; Duran *et al.*, 2016). Although some family business scholars argue that, compared with non-family firm counterparts, family firms exhibit better capabilities in leveraging exogenous factors to drive innovation outcomes (Heider *et al.,* 2022), the matter of whether or not family firms exhibit these better innovation capabilities remains the subject of ongoing scholarly debate (see Calabrò *et al.,* 2019; Roessl *et al.*, 2010).

It has been suggested that innovation in small family firms in particular is influenced by the combination of market conditions and business orientation (Laforet, 2013). Similarly, Beck *et al.* (2011) argue that innovation drivers within family firms are influenced by two key variables: market orientation and generational control. Regarding market orientation, their study found that the three constituent dimensions of market orientation – responsiveness, proactivity, and emergence (Narver *et al.,* 2004; Debruyne and Schoovaerts, 2006) – have a positive influence on innovation in family firms. However, when this relationship was utilized as a moderating role for the independent variable of generational control in relation to succession, their results found lower levels of innovation on account of less market-oriented activity and more family-oriented activity (wealth preservation). Building on this premise, Cassia *et al.* (2012, 204) state that “following generations often tend to become stable rather than innovators”. Thus, they advise family firms to overcome these tendencies by dedicating resources (both financial and socioemotional) to embedding innovation as a core competence for younger generations. This latter resource may be especially pertinent as scholars have suggested that the attributes of both internal and external social capital may influence the facets of the product innovation process by expediting more collaborative types of innovation (De Massis *et al.*, 2015b).

Some contemporary family business studies propose that innovation in family firms is principally driven by organizational traits such as risk taking (Fahed-Sreih and El-Kassar, 2017). This viewpoint is shared by Broekaert *et al.* (2016), who suggest that flexibility in switching between ‘normal’ and ‘innovation’ tasks can lead to better innovation performance on account of the associated enhanced new product development and cost control. According to Chen and Hsu (2009), innovation efficiencies in family firms through cost control may be attributable to the dual roles of management as owners as well as managers, and thus, their greater proclivity to circumscribe R&D investment to what is necessary for innovation. Chrisman *et al.* (2015) framework on innovation in family firms conceptualizes the conflicting governance drivers of willingness (disposition to act) versus ability (discretion to act) and the implications of these paradoxical tensions as family firms endeavour to manage the innovation process. For this reason, understanding the family-specific mechanisms that drive innovation and the associated ramifications for innovation strategy development is of the utmost importance in family firms.

Theorizing a family-driven innovation strategy

Contingency theory has been the prevailing underlying theory for understanding business or corporate strategy (Hofer, 1975), as well as innovation strategy at the organizational level (Mone *et al.,* 1998; Richard *et al.,* 2003). From an innovation perspective, contingency theory accentuates the task context of organizational subunits and advocates a differentiated response to divergent contextual demands (Ambos and Schlegelmilch, 2007). While contingency theory is not without its critics (see, for example, Schoonhoven, 1981), it has been successfully applied to numerous family firm studies (e.g., Sharma *et al.,* 1997; Zellweger *et al.,* 2012). According to Kammerlander *et al.* (2015), contingency theory promotes an integrated view of multilevel fit rather than singular effects, an approach that aligns with what Whittington (1996) described as the 'strategy as practice' paradigm, in which the integration of multiple organizational levels, inherent actors and reinforcing mechanisms are propagated.

Contingency theory is appropriate for exploring the relationship between family-driven innovation and innovation strategy at multiple levels (individual, family, and organization) in multi-generational family firms. A contingency perspective has the potential to account for 'the causal mechanisms that produce firm-level characteristics and behaviors, based on the characteristics, actions, and interactions of organizational members' (De Massis and Foss, 2018, 387).

Influence of family idiosyncrasies on contingency factors for innovation strategy

De Massis *et al.* (2015a) introduce a theoretical framework for family-driven innovation featuring three heterogeneity contingency factors which, they argue, correlate to family firm characteristics, as well as innovation strategies. These three contingency factors align with the three innovation strategy dimensions of 'where', 'how', and 'what' (De Massis and Frattini, 2016). The first contingency factor of 'where' relates to the *willingness* to move in a particular strategic direction. According to the extant family business literature, many of the idiosyncrasies of family firms affect their willingness to drive innovation strategies at multiple levels. For instance, Craig and Dibrell (2006) suggest that a symbiotic relationship between the natural environment and the firm members' sense of 'familiness' can facilitate performance-enhancing capacities through innovation, resulting in enhanced business sustainability for future family firm generations. The family firm literature also discusses sources of willingness to innovate based on both economic and non-economic goals (Chrisman *et al.*, 2015), given that an increase in goal congruence within family firms may drive risk-taking innovations and enhance firm performance (Lehmann *et al.*, 2023).

The second factor of 'how' corresponds to how inherent *structures* or *processes* facilitate (or hinder) the ability to move in that strategic direction. Family firm literature discourse indicates that family-driven innovation may be contingent on the amount of ownership held by the family (Filser *et al.*, 2016), with involvement in ownership affecting the manner in which innovation activities are enacted at the firm level (De Massis *et al.*, 2012).

The third factor of 'what' relates to the *capabilities* and *resources* required in order to move in that strategic direction. In the context of family firms, Bammens *et al.* (2015, 140) argue that 'family influence may create disadvantages in some innovation domains or facets and advantages in others'. Building on this notion, Broekaert *et al.* (2016) find that family firms in comparison with their non-family counterparts are disadvantaged at the firm level in terms of R&D resources and advantaged in organizational flexibility. However, their overall findings indicate that their capability to drive product innovation performance is redolent of non-family firms. They attribute this to the fact that R&D development is not the only avenue for driving innovation, especially process innovation, and that family firm managers should understand that their most effective strategic choices for driving innovation may be differentiated from non-family-owned businesses.

According to De Massis *et al.* (2015a), their family-driven innovation framework builds upon contingency theory whilst conceptualizing how the correlation of each contextual factor as a strategic innovation decision with its counterpart as a family firm idiosyncrasy holds the potential to facilitate family-driven innovation at multiple levels. Based on these arguments, we address the following research questions:

> **RQ1**: *How do innovation contingency factors ('where', 'how', and 'what') relate to the development of innovation strategies within family firms?*
>
> **RQ2**: *How are contingency factors, and their inherent relationships with innovation strategies, driven by the idiosyncratic characteristics of the family firm?*

Methodology

In line with the exploratory nature of our research questions, we deemed an interpretive methodology as appropriate for exploring the relationship between family-driven innovation and innovation strategies in multi-generational family firms. An interpretive approach based on multiple case studies can incorporate the complexity and context-specific meaning of circumstances (Black, 2006) and exploring complex issues whilst needing to contextualise key variables (Gummesson, 2006). It is a method used in family firm research (see, for example, Chirico 2008; Hytti *et al.*, 2017). The cases consisted of in-depth, semi-structured interviews, supplemented with detailed and extensive archival data. Our multiple case study research design choices were informed by the work of De Massis and Kotlar (2014), which presents family firm case study guidance for qualitative scholarship, and by Eisenhardt (1989).

We used purposive sampling (Pratt, 2009), selecting cases that are likely to replicate or extend theory (Eisenhardt, 1989). In selecting the case, we sought innovative family-owned SMEs (per the European Union definition of SME) that were owned and managed by the family, all with multi-generational aspirations (Clinton *et al.,* 2018). We selected firms characterized by strong family involvement as this could provide a clearer illustration of innovation strategies. We included firms from a diversity of industry sectors (Diaz-Moriana *et al.,* 2020) to allow for different family-driven innovation outcomes to emerge (both product and service innovation outcomes). Descriptive data for the four cases are outlined in Table 1 below. This shows that the four cases are all fully owned by family members (i.e., 100% family ownership); are SMEs; have a minimum of second-generation involvement in ownership and management of the business (2G to 5G); operate in the hospitality and industrial sectors; and two are characterized by product innovation, with two characterized by service innovation. By selecting firms that are similar in terms of family ownership and control and in terms of size (SME), and that are heterogeneous in terms of types of innovation and sector, our sampling approach fulfils the 'transferability' criterion of Guba's (1981) construct for qualitative research trustworthiness.

Table 1. Descriptive data on cases and interviews

Case study-based research can be associated with a unit of analysis from a range of micro or macro levels including individuals, organizational units, the firm or even communities or regions (Gamble *et al.,* 2016). In alignment with contingency theory, we adopt multiple levels of analysis (individual, family, and organizational) as we investigate how the idiosyncratic characters at the individual and family level relate to innovation strategy development at the firm level within family firms.

Data collection

Interviews were conducted with 5-6 different senior members of each case study firm (including the CEO, senior managers, board members, other non-family members, etc.). A total of 21 in-depth, semi-structured, face-to-face interviews were conducted. The interview questions were theoretically motivated by the constructs of the family-driven innovation framework developed by De Massis *et al.* (2015a). The interviews included questions such as 'What would you say have been the key developments or turning points in your firm's strategy in terms of innovation?' and 'How would you describe your firm's willingness to innovate versus its ability to innovate?'. The full set of interview questions is provided in Appendix A, and a breakdown of the interview data collected is provided in Table 1 above.

We supplemented our interview data with extensive longitudinal archival data, in which we collated relevant items of evidence by systematically searching through a list of archival databases in the public domain. This list included university databases, historical newspaper archives and targeted search engine databases. To be included in our dataset, the archival data had to feature an insight into the family firm from which inferences into their innovation drivers or strategies could be derived. A total of 1,496 archival items dating back 55 years to 1964 were collected from brochures, classifieds/advertisements, company webpages, factsheets, magazine articles, newsletters, newspaper articles, online articles, press releases, social media, and videos. A detailed breakdown of the archival data types that were collected for the four case study firms is presented in Table 2 below. The lower amount of archival data for Firm D compared to the other companies is attributable to the fact that the firm operates within an industrial industry sector in which minimal archival data is publicly available, and the firm had no corporate website.

Table 2. Archival data sources

When Tables 1 and 2 are considered holistically, the richness and detail of their descriptions of the cases and their associated datasets contribute to the analytical generalizability of our findings (Lincoln and Guba, 1985). By using data from multiple informants and from multiple sources, we reduced the possibility of biases associated with personal interpretation and we improved the robustness of our findings (Patton, 2014; Yin, 2013).

The four case study firms have been anonymized as Firms A-D, and individual interviewees have been anonymized into codes featuring their company and an acronym of their position (for example, the code for Firm A's Managing Director is A-MD). Full details about each interviewee (including job title and generation of the family) are provided in Table 1.

Data analysis

The analysis of the interview data was carried out by two members of the research team who were both highly familiarized with the case study firms and data sets, with a third team member acting as a referee, thus ensuring inter-rater reliability (Armstrong *et al.*, 1997). The research team began by compiling all textual data including interview transcriptions, field notes, and archival evidence on each of the four firms. As a result of this process, a comprehensive database was formed that facilitated the subsequent analysis framework to be implemented. We used an abductive, data-driven, four-phase constant comparison analysis technique for data analysis. This was operationalized by importing the transcriptions of the interview data as internal sources within NVivo, which was chosen as it is widely considered the standard computer-aided qualitative data analysis software for analyzing qualitative data (Bazeley and Jackson, 2013; Gibbs, 2002) – especially when a constant comparison analysis is used (Leech and Onwuegbuzie, 2011). When all of the archival data sources had been collected, they were also imported into NVivo as internal sources, as the use of NVivo to analyze literature sources is also advocated in the literature (Di Gregorio, 2000). Each internal source was then iteratively analyzed to facilitate the multilevel coding procedure of our analysis framework, as detailed below.

The four phases of our analysis framework are outlined in Figure 1 below. In Phase 1, category analysis was adopted as part of an abductive approach in which initial categories derived from our research aim and contingency factors are utilized to reduce the raw data set (DeCuir-Gunby *et al.,* 2011), whilst formulating broad thematic categories from which descriptions and comparisons can be facilitated (Edhlund, 2011; Ryan and Bernard, 2003). This resulted in five categories: willingness to innovate, structures and processes, resources and capabilities, innovation strategy elements, and idiosyncrasies of the family.

Figure 1. Research analysis framework

In Phase 2, thematic analysis was used in order to abstract any obvious themes from the category data (Edhlund, 2011) and, through the use of replication logic, compare them across the data sources (DeCuir-Gunby *et al.,* 2011). Accordingly, this analytical phase facilitated both within-case and cross-case analysis of the multiple case study data (Schweizer, 2015; Strauss and Corbin, 1998). For example, the category 'idiosyncrasies of the family' resulted in three themes: timeliness, founder influence, and succession.

In Phase 3, sub-thematic analysis was adopted to identify sub-themes within each theme and establish them within the hierarchical structure of the coded data (O'Neill, 2013), and then compare across the data sources (DeCuir-Gunby *et al.*, 2011). This again enabled both within-case and cross-case analysis of the multiple case study data (Schweizer, 2015, Strauss and Corbin, 1998), thus establishing internal validity by integrating pattern-matching techniques into the analysis process (Eisenhardt, 1989). For example, the three themes of timeliness, founder influence and succession (relating to the category 'idiosyncrasies of the family') resulted in five sub-themes. The sub-themes of close family communication, identifying business with family, and authenticity of familiness all relate to the theme of timeliness.

Finally, in Phase 4, reliability analysis was incorporated to cross-reference the data against participant characteristics (Elo and Kyngäs, 2008). Additional quality control checks were executed in Phases 2 and 3 by iteratively re-examining the coded dataset from the preceding phase (DeCuir-Gunby *et al.*, 2011), as shown in Figure 1. Overall, the rigour of our analysis framework takes steps towards fulfilling the 'dependability' criterion of Guba's (1981) construct for qualitative research trustworthiness. Our four-phase research analysis resulted in the identification of five theoretical categories, 17 themes and 28 sub-themes, as depicted in Figure 2 (Data Structure) below.

Figure 2. Data structure

Findings

A family-driven innovation model, in which the key findings are summarized in terms of theoretical constructs and main themes for discussion, is presented in Figure 3 below. This findings section is structured into the five categories of this framework: (i) idiosyncratic characteristics of the family; (ii) 'Where': willingness to innovate; (iii) 'How': structures and processes needed to innovate; (iv) 'What': capabilities and resources needed to innovate; and (v) Innovation Strategy elements.

Figure 3. Family-driven innovation model

Category 1: Idiosyncrasies of the family

Within this category, three key themes emerged relating to *familiness*, *founder influence* and *succession*. Within the theme of *familiness,* two members of Firm A independently talked about the importance of identifying the business with the family, with A-M commenting that 'The boys do for sure, they take it all extremely hands on. They pride themselves now on being the faces of the business.' Within the theme of *founder influence*, it emerged that next-generation adaptations to fit founder ethos was instrumental. C-SMM from Firm C commented that ‘it comes from the leader so you know […], in fairness to [the CEO], anything he comes up with it always works’. A 2005 newspaper article on Firm B reflects this point by stating how, after the founder’s death, his children fought acrimonious boardroom battles in his name to safeguard his legacy. Within the theme of *succession*, the aspect of the impact of sudden succession within Firm B after the founder’s death was raised as a key issue by B-BM: ‘the transfer from first generation to second generation was very difficult because he died very suddenly, and most of the family were working’.

Category 2: ‘Where’ - Willingness to innovate

Within this category, four key themes emerged relating to *changing attitudes*, *competitiveness*, *business improvements*, and *limiting factors*. The findings in relation to *changing attitudes* highlight a key sub-theme of new leadership from the next generation that drives this change. This was expressed by Firm A, in which one respondent (A-HRM) stated that her father and company founder ‘did not want to leave the shop in town, and the move was finally completed in 2001 when my brother took over the company.’ Two members of Firm A also independently expressed the same view that there was still some residual hesitation to innovate, due to the founder’s ongoing influence because ‘a small bit of that somewhere rubbed off on us’ (A-MD2). Similarly, a 2005 newspaper article on Firm B showed that when the founder’s son assumed leadership, he wished to invest heavily in upgrades to make them able to compete with world-leading competitors.

On the theme of *competitiveness*, the interviews revealed the use of innovating to out-manoeuvre, with one respondent (D-SM1) stating that ‘innovation is vital from within in [Firm D], as it gives us the edge in penetrating the marketplace faster with quality products.’ This statement is supported by a 1998 newspaper article, which describes how their market success is partly due to offering colour customisation for most of their products - an increasingly popular new trend. However, in contrast, a respondent from Firm B suggested that non-leadership innovation (i.e., innovation not associated with first-to-market products or services) can play a key role in competitiveness, as ‘we would innovate but we will not go out and buy the first rocket to the moon, we might buy the second one if it is going to give us competitive advantage’ (B-M).

Within the theme of willingness to innovate through *business improvements*, the notion of new ideas and methods was highlighted by a respondent (B-HO), who stated that ‘my understanding of innovation being that it’s about looking at new ways of doing the same thing. Finding better ways to do it.’ This is corroborated by a 2006 newspaper article, which talks of how Firm B’s new CEO in 1987 oversaw numerous developments at the hotel including revamps of the leisure centre, restaurant, children’s area, and reception, alongside the creation of a new spa.

Category 3: ‘How’ - Structures and processes needed to innovate

Within this category, two key themes emerged relating to *family board* and *governance structure*. Within the theme of *family board*, shareholder support emerged as significant, with a respondent (B-BM) commenting that ‘we’re actually very clear on what the shareholder’s rights and needs and wants are, and then similarly then allowing management a lot of bandwidth to be able to do what they can do with within that.’ This statement is advocated by a 2017 newspaper article, which described the founder’s daughter as the latest generation to innovate and succeed.

Within the theme of *governance structure*, decision-making power was cited by a respondent (C-M2) from Firm C: ‘you want the best for the business, you don't mind if you’re like it’s fine if we don’t make as much money this year, but at least we’ve invested in something good and it's going to be good for the future.' This statement is supported by recent archival data (Company webpage, 2017), which stated that '[Firm C] is making a significant investment for the long-term future of the company by re-locating its present warehouse to a new purpose built 50,000 sq. ft distribution centre'. The aspect of organizational skills was also mentioned by B-BM from Firm B, as 'we can allow family representatives to sit in positions on boards in a very functional way that allows the company to have a defined mandate from the shareholders'.

Category 4: 'What' - Capabilities and resources needed to innovate

Within this category, three key themes emerged relating to *creativity, financial resources* and *knowledge resources*. Within the theme of *creativity*, a number of sub-themes emerged. For instance, B-HO from Firm B discussed how their receptiveness to new ideas makes their approach to creativity 'very collaborative. There's no such thing as a bad idea.' For Firm D, D-CEO stated that the importance of their company youth has been key to how they 'have embraced innovation, which has helped us get a substantial market share', whereas staff youth have 'helped us to always be on the lookout for innovative ideas and new ways.'

Within the theme of *knowledge resources*, three key sub-themes emerged. Feedback from customers emerged as significant to D-BM from Firm D, who commented that 'we are always looking for new ways for customers to give us feedback and recommendations.' This statement is corroborated by a 2011 newspaper article, which discusses a challenging time for the company in which consumers were cutting back on luxury items. The aspect of staff diversity was independently raised by members of Firm C and Firm D, with C-M2 stating that 'every generation has brought their stamp or something different with them'. This statement is corroborated by a 2016 company newsletter, which introduces new digital innovations in the form of an improved online shop, as well as the more traditional innovations of new product lines. The matter of staff training emerged as a key sub-theme after being independently raised in interviews with members of Firm B, Firm C, and Firm D, with D-MM commenting that 'we brought in a person to teach our staff that are dealing with customers on a daily basis how to do so effectively while in keeping with the culture of the company.'

Category 5: Innovation Strategy elements

Within this category, five key themes emerged relating to *alignment with vision and culture, generational approaches to innovation decisions, change strategy, future orientation,* and *family versus individual decisions*. Within the theme of *alignment with vision and culture*, there was discussion of alignment of innovation so that it constituted a part of the organizational culture of the family firm. In this regard, C-SM from Firm C commented that 'I think the ethos [of innovation] has been carried right through, like in the length of time I've been here, and you kind of mould yourself into that whole ethos, and it's great.' This point was evident in a 2012 company video by Firm A, which stated that they are united by common values and beliefs and that they all believe in long-term commitment.

Within the theme of *generational approaches to innovation decisions*, the most significant sub-theme, as raised by A-MD2 from Firm A, was about shifting to a more proactive approach: 'we have taken a somewhat proactive approach in the last 20 years anyway, moving to the Lighthouse. Our new building was innovative and made a huge difference in the expansion of the business.' This point was also corroborated by a 2018 company brochure, which stated that Firm A's innovative design is the hallmark of their re-imagined event space. Within the theme of *change strategy*, A-M expressed that innovation strategy in Firm A 'means making changes to keep growing and improving', whilst staying modern and meeting consumer needs. This is evident in a 2017 press release, which stated that the founder's visions are to establish a group of hotels at the forefront of design and product innovation.

Within the theme of *future orientation*, several key sub-themes emerged. Expansion plans were independently raised by members of Firms A and D, in which D-M exhibited a more cautious approach: 'I would have thought expansion overseas to UK could have been a viable option a few years back, but with the uncertainty of Brexit looming I feel we should hold off on this for a number of years'. The matter of future investments was also independently raised by members of two companies – Firm B and Firm C – in which B-BM described how they have 'invest[ed] heavily in the product, but with the right information when we knew what we were expecting to get out of it.' The sub-theme of leadership was evident in comments by a respondent (C-SMM) who gave an insight into their trust in the leadership of Firm C: 'I'd be very positive about the innovations that will come. We don't know them yet, they're all in [the CEO's] head.' This point is corroborated by a 2018 newspaper article, which states that, despite the company CEO not being present on a day-to-day basis, he still maintains full awareness of the daily operations.

Within the theme of *family versus individual decisions*, the prospect of team-based idea generation was independently cited by members of Firm C and Firm D, in which D-M discussed how they 'offer internal employees an opportunity to pitch potential ideas and new product concepts to senior management.'

Discussion

We now discuss how innovation contingency factors ('where', 'how', and 'what') relate to the development of innovation strategies within family firms? (RQ1) and how these contingency factors, and their inherent relationships with innovation strategies, are driven by the idiosyncratic characteristics of the family firm (RQ2). We do this by structuring our discussion around each of the five elements of family firm innovation strategy that emerged from our analysis (Figure 3).

Innovation strategy: Aligning innovation with vision and culture within the family firm

Contingency theory suggests that organizational culture influences the implementation of strategy in family firms (Sharma *et al.,* 1997). As presented in the findings and in Figure 3, a key facet of the innovation strategy within multi-generational family firms is how innovation activities are aligned with the overall vision of the family firm at the organizational level, and how this is achieved by establishing innovation as part of the organizational culture of the firm. Our findings advance contingency theory in two ways. First, our data demonstrates how the cultural ethos of multi-generational family firms facilitates the infiltration of innovation throughout the organization at the firm level. Specifically, we demonstrate how the training from external personnel ensures that new knowledge and creative ideas are consistent with the organizational culture of the family firm. Second, our data demonstrate that this key aspect of innovation strategy is enabled by the specific subsets of the contingency factor of willingness to innovate ('where') at the organizational level. Specifically, we find that competitiveness in terms of non-leadership innovation enables this willingness to innovate, as family firms seek competitive advantage as early adopters (rather than market leaders), which feeds into their alignment of organizational culture, innovation, and family firm vision. In doing so, our findings advance the theoretical foundations of De Massis *et al.* (2015a), who theorize that establishing the fit between contingency factors permits family firms to develop competitive advantage. These findings, in the context of innovation strategy and family firms, contribute to the broader understanding of contingency theory as a perspective through which organizations can enhance performance by improving fit and alignment with defined contingency variables.

Our insights into the endogenous alignment of contingency factor subsets with innovation strategy elements of family firms are significant as they directly address the call from De Massis *et al.* (2015a, 9) for scholars to consider 'the internal consistency between the key contingency factors that capture the heterogeneity of innovation decisions' within family firms. In doing so, our findings further enrich contingency theory by offering relational insights into how the 'what' contingency factor of resources and capabilities is aligned with family firm members' sense of 'familiness' at the individual level in terms of communication and identifying the business with the family. Specifically, our findings reveal how the creativity sub-set of this contingency factor is driven by the open and trusting communication channels between individual employees (both family and non-family) who feel a sense of closeness with each other. By extrapolating the above relationships and driving forces behind contingency factors at the organizational and individual levels, we have exposed new understandings of the underlying mechanisms behind their alignment, which contributes to the broader understanding of contingency theory and how it can be applied within organizational contexts.

Innovation strategy: Generational approaches to innovation decisions within the family firm

The second key element of the innovation decisions of multi-generational family firms, as identified in the interview and archival data of the current study, corresponds to how these firms are shifting towards a more proactive approach to innovation. In advancement of the work of Beck *et al.* (2011), which maintains that family firm innovation drivers are influenced simultaneously by generational control and market variables, we have found that, over extended periods that can transcend generations within the family, there is a tendency to take more significant (and often high-risk) market decisions in order to innovate and expand. Our findings for the reasons behind this innovation strategy element diverge from those of the previous element, as here we identify evidence of only one contingency factor of willingness to innovate ('where'), which we found to be predominantly driven by changing attitudes associated with leadership transition at the family level. These findings offer significant empirical evidence to substantiate the theorization of Erdogan *et al.* (2020, 20) of how "the long-lasting legacy of previous family generations shapes different approaches to innovation".

It is well established in the family literature that the founder of the family firm is often risk adverse and more focused on the family brand and sustainability rather than innovation (Beck *et al.*, 2011; Kellermanns and Eddleston, 2006). We find that this often-problematic transition to new leadership in the second generation is actually vital for revitalizing the firm's innovative capabilities and enabling the transcendence to more proactive approaches to innovation at the firm level. In doing so, our multilevel findings contribute to current scholarly debates regarding the extent to which family firms leverage enhanced capabilities to drive innovation (see Calabrò *et al.*, 2019; Roessl *et al.*, 2010). We also advance previous research discoveries and build upon contingency theory understandings by demonstrating how this subset not only contributes to this contingency factor, but is also fundamentally driven by founder influence and succession as drivers within the family firm. Thus, our findings at the family level advance recent family firm succession studies by revealing that the next generation adapting to fit the founder ethos, which was evident in our case firms (and many family firms more generally), is important in terms of loyalty and maintaining a 'safe' re-treading of previous paths to success. We find that this ultimately creates tension with successor desires to innovate and forge more progressive leadership styles, which contests previous scholarly arguments that later family generations are less willing to develop innovator attributes at the family level (Laforet, 2013). We suggest that this tension may be exacerbated with the impact of sudden succession, during which there will manifest heightened emotive wishes to honour the values of the founder, conflicted with freedoms to lead the firm in new and innovative directions without endogenous resistance.

De Massis *et al.* (2015a) theorize that establishing the 'fit' between contingency factors and idiosyncratic family drivers may prove pivotal for the resolution of the innovation paradox in family firms (whereby they fail to innovate despite having the capacity to do so). Our empirical findings from both interview and archival data suggest that the easing of these tensions towards taking more proactive approaches to innovation is contingent on the other 'where' willingness factor sub-set of business improvements, which often result from new ideas and methods introduced into the firm-level business model of the family firm. The key driver here is familiness in terms of communication between organizational actors, which highlights the significance of maintaining positive and open relations at the family level – especially during sensitive periods such as new leadership directions. Hence, our multiple data sources demonstrate the contingency effects by explaining how familiness emerged through the collective decision for the founder's son to take over as the new CEO, which resulted in a new approach of innovating through enhanced repetition. These insights contribute to contemporary debates about the application of the 'problematization' innovation strategy, whilst expounding the mechanisms that link aspects of the 'where' contingency factor at the organizational level with idiosyncratic characteristics at the family level. Specifically, we show how family firms use an adaptation of the problematization strategy, whereby shared understanding (and ultimately problem resolution) at the family level is not achieved through the consolidation of work direction from the individual members, as suggested by Morua and Marin (2016), but in fact by the introduction of innovative ideas and methods combined with family-driven communications at the firm level.

Innovation strategy: Change strategy within the family firm

De Massis *et al.* (2015a, p. 12) state that in family firms, "innovation concerns improvements to the processes […], changes that are not immediately visible to its clients." In our findings, the third key element of a family firm's innovation strategy is the firm's change strategy in terms of external customer base, as well as internal growth and improvement. Our data reveals how these two aspects provide key insights into the enterprising nature of family firms, as they seek to continuously change their own operations by way of expanding and streamlining, in order to remain relevant and meet their customer needs, but they are even willing to go to the extremes of manipulating these needs. The strategy of changing the firm's customer base demonstrates how family firms have much clearer firm-level strategic visions than hitherto thought, and can be willing to change their demographic targeting (whilst risking the loss of loyal customers) in order to meet innovation goals. This evidence offers new empirical insights into how increased goal congruence in family firms incites risk-taking innovations, as previously theorized by Corbetta and Salvato (2004).

We also contribute to contingency theory by demonstrating how these two key facets of the innovation strategy are enabled by the 'what' contingency factor of resources and capabilities. For instance, the prospect of changing the customer base is facilitated by financial resources in terms of budget considerations, in which the pressures of budget limitations associated with rising costs may result in family firms moving to more calculated ways of developing their customer base. Furthermore, the aspect of growth and improvement is influenced by knowledge resources at the firm level in terms of customer feedback, in which some family firms actually innovate by seeking out new ways to incentivize customers to provide recommendations, thus demonstrating concerted efforts to include customer input in decision-making for the change strategy element of their innovation strategy. Our findings suggest that this inclusivity with the customers is driven by how family firms identify the business with the family, as this represents a natural extension of the hands-on approach and 'familiness' exhibited at the family level by even senior management levels of the firm.

Innovation strategy: Future orientation within the family firm

De Massis *et al.* (2015a) maintain that innovation brings associated higher levels of risk for family firms due to its explicit impact on market positioning. The fourth key element of a family firm innovation strategy is future orientation, with family firms exhibiting a notable outlook towards future expansion to neighbouring countries and markets, although this is often offset by caution and hesitation due to environmental or political uncertainty. Interestingly, whereas innovation strategy scholars discuss the need for stoppages in the innovation process to mitigate against uncertainty and failure (Salerno *et al.*, 2015), our findings reveal instead a calculated approach towards investments for the future, with evidence of how family firms often hold back until they have sufficient information on the investment and sufficient clarify about expected future goals. In doing so, we not only enrich innovation strategy debates regarding risk-averse approaches to innovation at the firm level, but we also corroborate and explicate previous empirical research findings that family firms invest positively but less intensely than their non-family counterparts (Classen *et al.*, 2014; Duran *et al.*, 2016).

The main divergence from these cautionary approaches to future orientation was how family firms tend to exhibit more confident reliance in current leadership to implementing future innovations on behalf of the company. In advancement of contingency theory, our findings demonstrate how these constituents of future orientation are influenced predominantly by the ‘where’ contingency factors of willingness to innovate. We observe how competitiveness in terms of innovating to out-manoeuvre facilitates the confidence in leadership to succeed with future-oriented innovations. This confidence is coalesced by the realization that innovating within competitive markets can lead to superiority both in terms of product/service quality, as well as speed of market penetration in comparison with their competitors. These insights extend the arguments of Chrisman *et al.* (2015), who discuss in more general terms how willingness from both economic and non-economic goals epitomize contributing factors for family-driven innovation.

Innovation strategy: Family versus individual decisions within the family firm

Strategic decisions lie at the heart of family-driven innovation (De Massis *et al.,* 2015a). The fifth element of the family firm's innovation strategy is family versus individual decisions. The data illustrated the importance of shared decision making and the importance of firm-wide communication and involvement in the decision-making process. Whereas organizational innovation in non-family contexts is traditionally understood to be contingent on the level of employees (Daft, 1978), our family-level findings reveal the extent to which family firms strive for idea generation to be a team effort, by formally introducing opportunities for all levels of employee to pitch innovation ideas to senior management. Building on the theoretical construct of contingency theory, and in particular the suggestion by Corbetta and Salvato (2004) that family-related contingency variables cluster around the experience and composition of managerial teams, our findings show how these aspects of this innovation strategy element are enabled predominantly by the 'how' contingency factor of structures and processes, with specific emphasis on governance structure in terms of family-level skills.

De Massis *et al.* (2015a, p. 9) state that 'organizational authority arises from the family owners' power and legitimacy, which is a function of the structures, governance mechanisms, and decision-making processes'. However, we observed that when family firms structure their board representatives at the family level to streamline functionality, it permits different shareholders to define their mandate and contribute to the decision-making process, rather than consolidating the family owners' power as suggested by other scholars (see, for example, Bruque and Moyano, 2007).

Our data demonstrate that the governance structure is influential for decision-making power at the organizational level, as we find that family firms are structured in such a way that makes them willing to make difficult decisions that result in short-term profit reductions yet long-term investment success. Corbetta and Salvato (2004, 125) argued that "a contingency model of family business boards of directors should […] bear relevance in determining governance needs.” It is generally understood that family firms negate most underlying assumptions with regards to traditional theories of board governance (Muñoz-Bullón and Sánchez-Bueno, 2014). Accordingly, our family-level findings reveal how governance can be aided by how the family board facilitates shareholder support. In this circumstance, clarity surrounding the rights and requirements of individual shareholders can provide firm management with a workable framework within which to operate.

Contributions, Limitations and Future Research

Contributions

This paper contributes to current debates on how innovation mechanisms at the individual or family level within family firms relate to the development of innovation strategies at the organizational level. Drawing on contingency theory, an underlying theory for understanding strategic decisions in organizational innovation (De Massis *et al.,* 2015b; Mone *et al.,* 1998), we identify five specific elements of family firm innovation strategies (i.e., vision and culture alignment, generational approaches, change strategy, future orientation, and shared decision making) and we show how family firms use adaptations of the ‘problematization’ innovation strategy and alternatives to stoppage-based innovation strategies. We provide evidence of how these elements of innovation strategy are facilitated by different combinations of contingency factor subsets at the individual or family level, and we show how three contingency factors (‘where’, ‘how’ and ‘what’) relate to innovation strategies. Our paper advances and builds upon contingency theory by providing original insights into how organizational subunits within family firms support heterogeneous responses to diverging contextual demands (Ambos and Schlegelmilch, 2007), and how these contextual family-level factors influence organizational structures and innovation management at the firm level (Tidd, 2001).

The paper's second contribution is to the emerging family-driven innovation research domain by showing how the idiosyncratic characteristics of the family firm drive innovation (De Massis *et al.,* 2015a). This contribution is contextually significant because, despite the practical application of family-driven innovation (Broekaert *et al.,* 2016) and the development of innovation strategies within family firms (Bammens *et al.,* 2015), we have identified outstanding gaps in the literature regarding which factors lead to the successful implementation of innovation within family firms (Beck *et al.,* 2011), and under which circumstances family involvement translates into positive innovation-related outcomes (Bammens *et al.,* 2015). By empirically exploring the relationships between family firm idiosyncrasies and innovation strategies at multiple levels, we take steps towards closing these gaps and advancing current understandings of family-driven innovation. For instance, our findings offer extensive and comprehensive insights into how the underlying mechanisms of family drivers of familiness, founder influence, and succession at the individual and family level influence the factors that enable the innovation strategies of multi-generational family firms at the organizational level. For example, we now know how aligning resources with individual family members' sense of familiness discloses how creativity is driven by open communication channels based on trust. Furthermore, our findings reveal that if new leadership adapts to fit the founder ethos, this can create tension with their own desires to innovate and forge a progressive leadership style, thus challenging assumptions in the literature that subsequent generations are innovation averse (see Laforet, 2013). Our findings also expose insights that explain how the relationship between the three contingency factors and innovation strategies of family firms is driven by the idiosyncrasies of the family firm, whilst germinating new understanding of the underlying mechanisms behind these relationships and thus advancing the theoretical work of McAdam *et al.* (2019). In doing so, we have answered the second research question of our study.

Limitations and future research

This research investigation has a number of theoretical and empirical limitations. Our decision to focus our theoretical lens on contingency theory and, by implication, context was justified and instrumental to the development of our theoretical argument. However, we concede that the contingency approach offers a somewhat deterministic understanding of context with the notion of ‘fit’ assuming a one-to-one relationship between structure and strategy. Future research could therefore investigate whether different theoretical lensing could further unpack the idiosyncrasies addressed in the current study and potentially reveal additional insights into the relationship between family-driven innovation and innovation strategies.

Our qualitative methodology has the advantage of providing a suitably high level of phenomenalistic understanding and clarification of our research questions. It is argued that qualitative methodologies facilitate systematic generalization (Buchanan and Bryman, 2007) and access to subjective organizational experiences (Cassell *et al.*, 2006) as opposed to generalizations across populations. Despite this, our study has been subject to empirical limitations which may affect the generalizability of our findings. For instance, our data were collected from a relatively small number of case study firms, although we nevertheless generated a significant amount of empirical data from our 21 interviews and 1,496 items of archival data. Our case study firms were also all located in the same western European country, which may affect the heterogeneity aspect of the study through sample bias. Further research could compare our results against a larger pool of family firms from the same industry, or from another country, in order to advance our theoretical findings into family-driven innovation whilst enhancing their generalizability. Moreover, future research could potentially seek to understand whether the idiosyncratic characteristics that are context-specific can be ascribed to the dynamics of each individual family firm or, instead, of each individual business family (Heider *et al.*, 2022) or entrepreneurial family (Nordqvist and Melin, 2010).

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<u>Appendix A: Interview questions</u>

1. What do you understand by the term 'innovation' and what role does it play within the strategy of any given firm?

2. How important is innovation to your firm? **(How important compared with other aspects of its strategy)**

3. How would you describe your firm's approach to innovation? Has this changed over the years? **(Investment of time, money, people, etc.)**

4. What types of innovation has your firm been involved in over the years? **(Open (external)/closed (in-house), product/service, process, incremental (minor)/radical (major)) Can you give examples?**

5. What would you say have been the key developments or turning points in your firm's strategy in terms of innovation? **(Specific family or non-family critical events)**

6. Have there been any innovations that didn't work and, if so, then why not? **(What have you learned from this as a family and a business?)**

7. To what extent would you say that the family traditions within your firm have affected its innovation strategy over the years? **(Positive/negative; enabled/hindered)**

8. How would you describe your firm's willingness to innovate versus its ability to innovate? **Has this relationship between willingness and ability changed over time?**

9. In what ways has your firm grown over the years and what role would you say innovation has played in its growth?

10. And finally, looking at the next ten years, how do you see your firm developing in terms of innovation?

Table 1. Descriptive data on cases and interviews

Firm	*Interviewee*	*Job title*	*Generation*	*Firm type*	*Firm size (employees)*	*Year founded*	*Industry*	*Innovation type*
Firm A	1	Managing Director (MD1)	2nd	Private	50-100	1979	Industrial	Product
	2	Manager (M)	2nd					
	3	HR Manager (HRM)	2nd					
	4	Managing Director (MD2)	2nd					
	5	Director (D)	2nd					
Firm B	1	Board Member (BM)	3rd	Private	100+	1964	Hospitality	Service
	2	Manager (M)	Non-family					
	3	Head of Online (HO)	Non-family					
	4	Chief Financial Officer (CFO)	Non-family					
	5	Chief Executive Officer (CEO)	Non-family					
Firm C	1	Managing Director (MD)	4th	Private	1-20	1895	Hospitality	Service
	2	Manager (M1)	Non-family					
	3	Manager (M2)	5th					
	4	Sales & Marketing Manager (SMM)	Non-family					
	5	Financial Manager (FM)	Non-Family					
Firm D	1	Sales Manager (SM1)	2nd	Private	20-50	1974	Industrial	Product
	2	Board Member (BM)	1st					
	3	Sales Manager (SM2)	Non-family					
	4	Manager (M)	2nd					
	5	Marketing Manager (MM)	Non-family					
	6	Chief Executive Officer (CEO)	2nd					

Table 2. **Archival data sources**

Year	Firm A	Firm B	Firm C	Firm D
1964-1970	CA(1), NA(4)			
1971-1980	NA(7)	NA(7)	NA(1)	
1981-1990	NA(8)	NA(6)		
1991-2000	NA(4)	NA(10)	CA(1), NA(1)	NA(4)
2001-2010	NA(8), OA(1)	NA(16)	CW (48)	CA(1), CW(14), NA(5), OA(1)
2011-2018	B(10), F(9), CW(539), MA(2), NA(19), N(1), OA(13), PR(104), SM(5), V(2)	B(2), CW(126), NA(27), OA(9)	B(9), CW(452), N(1), SM(9)	NA(8), V(1)
Total	**737**	**203**	**522**	**34**

B=brochures, CA=classifieds/advertisements, CW=company webpages, F=factsheets, MA=magazine articles, N=newsletters, NA=newspaper articles, OA=online articles, PR=press releases, SM=social media, V=video.

Figure 1. Research analysis framework

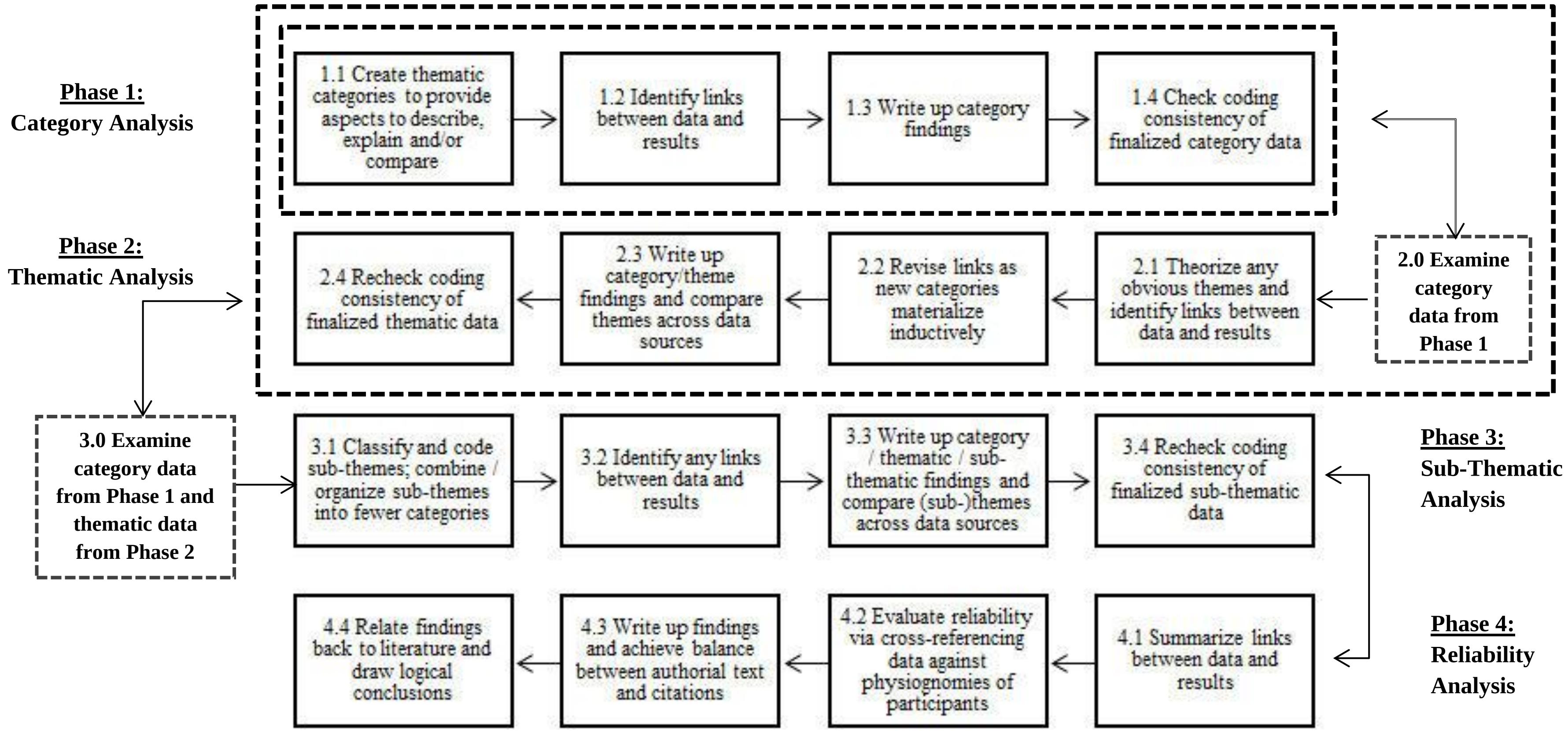

Figure 2. **Data structure**

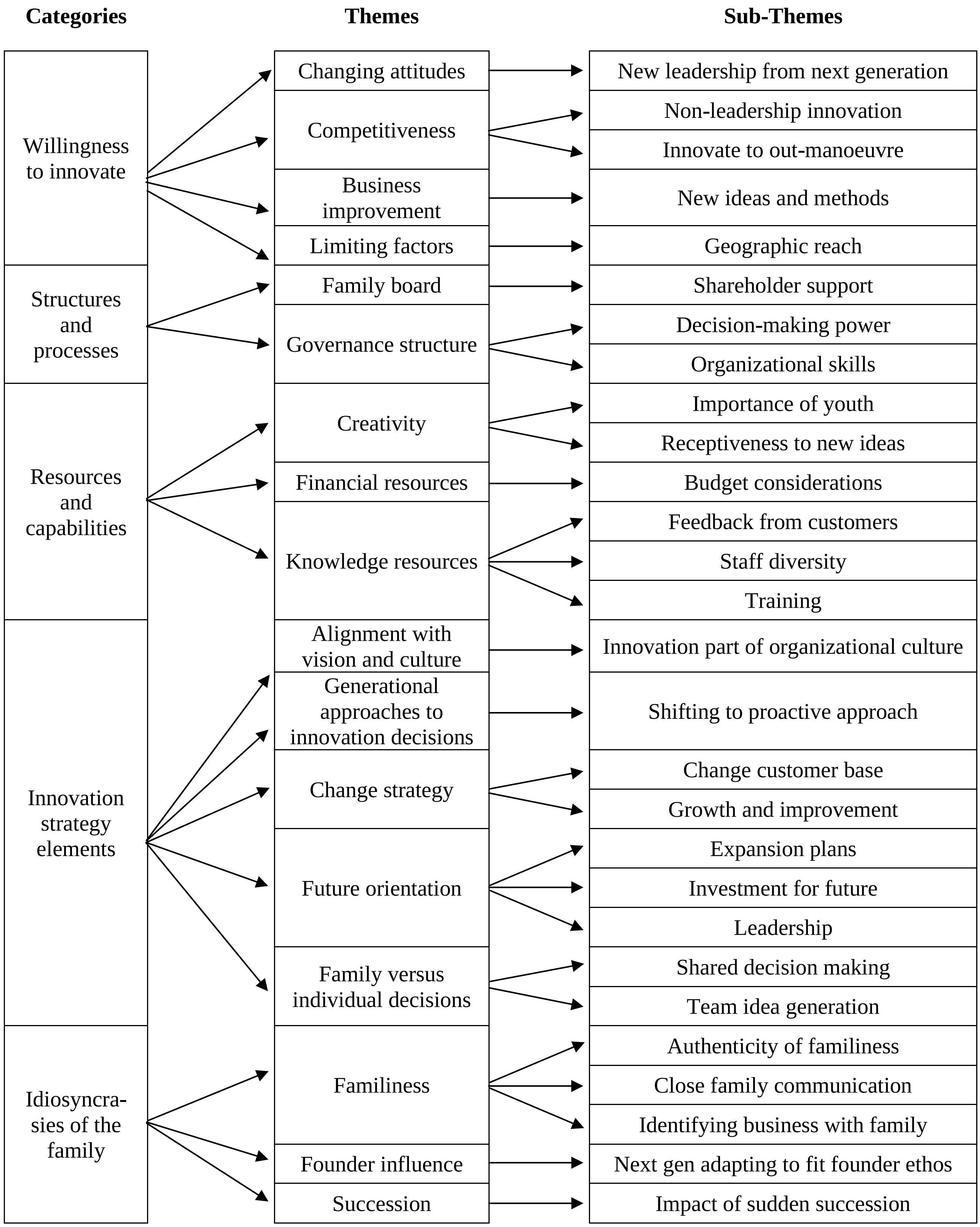

Figure 3. Family-driven innovation model