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REVIEW ARTICLE

Marketing

**MARKETING STRATEGIES IN SMALL AND MEDIUM-SIZED FAMILY
BUSINESSES TO BE COMPETITIVE IN COLOMBIA**

**ESTRATEGIAS DE MERCADEO EN PEQUEÑAS Y MEDIANAS EMPRESAS DE
FAMILIA PARA SER COMPETITIVAS EN COLOMBIA**

**ESTRATÉGIAS DE MARKETING EM PEQUENAS E MÉDIAS EMPRESAS
FAMILIARES PARA SEREM COMPETITIVAS EM COLOMBIA**

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Abstract

The challenges faced by family businesses have been widely studied worldwide due to their importance in the economic and social development of countries. This article aims to demonstrate that marketing strategies in small and medium-sized family businesses enable them to achieve competitive positioning in global markets. The research method is descriptive, based on a literature review, document analysis, and interpretative approaches, using PRISMA and VOSviewer as search tools in major databases such as Google Scholar, Redalyc, Scopus, and SciELO. The results of this study indicate that, among these challenges, management, generational succession, and marketing are the most critical issues, as they determine the sustainability of their growth over time and, consequently, their contribution to a country's economic and social development. The study offers a value proposition by presenting actions that allow entrepreneurs to ensure the continuity of their businesses.

Keywords: management; company; strategy; marketing; SMEs

JEL: D21, F66, J12, J21, K36, M31.

Resumen

Las problemáticas de las empresas de familia vienen siendo investigadas ampliamente a nivel mundial, dada su importancia en el desarrollo económico y social de los países. El presente artículo busca evidenciar que las estrategias de mercadeo en pequeñas y medianas empresas de familia, les permiten un posicionamiento competitivo en los mercados a nivel global. El método de investigación es de carácter descriptivo, a partir de una revisión de literatura, documental e interpretativo, utilizando las herramientas PRISMA y VOSviewer, como estrategia de búsqueda en las principales bases de datos como Google Scholar, Redalyc, Scopus y SciELO. Los resultados de este estudio indican que, entre todas estas problemáticas, la gestión, el relevo generacional y el marketing, resultan ser las más críticas, puesto que de ellas depende la sostenibilidad de su crecimiento en el tiempo y, por tanto, su aporte al desarrollo económico y social de un país. El estudio presenta como propuesta de valor, algunas acciones que permiten a los empresarios darles continuidad a sus negocios.

Palabras clave: gestión; empresa; estrategia; marketing; PYMES.

JEL: D21, F66, J12, J21, M31.

Resumo

Os problemas das empresas familiares têm sido amplamente investigados em todo o mundo, dada a sua importância no desenvolvimento económico e social dos países. Este artigo procura mostrar que as estratégias de marketing nas pequenas e médias empresas familiares permitem-lhes um posicionamento competitivo nos mercados globais. O método de pesquisa é de natureza descritiva, baseado em revisão de literatura, documental e interpretativa, utilizando as Ferramentas PRISMA e VOSviewer, como estratégia de busca nas principais bases de dados como Google Scholar, Redalyc, Scopus e SciELO. Os resultados deste estudo indicam que, entre todos estes problemas, a gestão, a mudança geracional e o marketing revelam-se os mais críticos visto que a sustentabilidade do seu crescimento ao longo do tempo e, portanto, a sua contribuição para o desenvolvimento económico e social de um país. O estudo apresenta como proposta de valor, algumas ações que permitem aos empreendedores dar continuidade aos seus negócios.

Palavras chave: gestão; empresas; estratégia; marketing; PME.

JEL: D21, F66, J12, J21, K36, M31.

Introduction

Family businesses generate employment in the country. In 2021, 86.5% of companies in Colombia were family-owned. However, only 13% survive into the third generation (Villarreal, 2011). This situation presents an opportunity for academics to investigate the underlying causes and determine strategic actions to increase the continuity rate of family businesses in Colombia (Confederación Colombiana de Cámaras de Comercio [Confecámaras], 2022). Several factors contributing to the failure of these businesses have been identified, such as the lack of sustainable competitive advantages, innovation, adoption of emerging technologies, weak organizational structures, and the hindrance of processes due to the absence of family corporate governance protocols (Morales & Morales, 2022). For instance, in 2022, only 21% of Colombian companies reported having succession plans. Additionally, there are limited governmental platforms to support the planning and guidance of these businesses, including asset protection schemes and technical advisory services, such as strategic marketing (Arbeláez, 2003).

When analyzing family businesses in Latin America, the conditions are not much different. Key deficiencies include the lack of succession plans, with six out of ten firms lacking them (Espinosa et al., 2022). In Colombia, 30% of businesses plan to pass leadership or ownership to the next generation, compared to 57% in Latin America. Furthermore, 55% of Colombian family businesses expect new generations to gain experience within their companies, compared to 76% globally. Engaging future generations is crucial not only for ensuring the longevity of these businesses but also for leveraging dynamic capabilities and preserving the organizational culture that provides competitive advantages (Alvarado, 2020).

As of 2022, 55% of family businesses in Colombia operate in the service sector, 26% in production, 12% in agriculture, and 7% in construction. Regarding their size, 19% are large businesses (with over 250 employees), 32% are medium-sized (50 to 250 employees), and 49% are small (fewer than 50 employees). For academics, it is noteworthy that only 28% of family business presidents are women, highlighting a gap for further research (La Nota Académica, 2022).

In the 1990s and 2000s, various authors studied family businesses worldwide, finding that these businesses account for 80% of the market. For example, 96% of businesses in the United States, 76% in Spain, and 70–75% of SMEs in Colombia are family-owned. These studies conclude that family businesses are the backbone of economies. They also highlight how business knowledge and practices are often passed down through generations, ensuring the company's sustainability. However, they also point to the complexities associated with family businesses, such as loyalty issues, commitment, and third-party involvement, which impact their development in Colombia (Sandoval & Guerrero, 2010).

Some researchers have focused on the historical development of entrepreneurship and the economy in Latin America, providing insights to strengthen these areas. Key topics studied include various economic sectors, businesses of all types and sizes, and family businesses. As Alvarado (2020) notes, significant emerging developments in family businesses include improvements in organizational structures, the creation and strengthening of corporate governance, family succession, and the main components required for market longevity and business internationalization.

Simplified Joint Stock Companies (S.A.S. in Colombia), in which capital is divided into shares, offer numerous opportunities for family businesses in Colombia within this regulatory framework and public policies expressed through laws, regulations, and other measures. However, many companies lack awareness of this business structure. This lack of clarity is significant because, by 2013, over 95% of corporations in Colombia were established under this model (Betancour et al., 2013). The profitability of family businesses is directly linked to family members' involvement (Moreno, 2014). This information was gathered from over 1,038 companies studied in Colombia between 2008 and 2010, exploring whether profitability was achieved through family involvement and whether profits benefited members individually or collectively, alongside social factors impacting society (Mayorga & Martínez, 2015).

Calderón (2016) found that Colombia currently ranks third globally in entrepreneurial activity, following Thailand and Peru. However, while many new businesses are created, 10.52% are suspended. These closures often result from establishing businesses without strategies or legal frameworks, unlike formally constituted companies, 22.48% of which survive and generate employment. These “family microbusinesses” often emerge as a societal response to the need to overcome challenges (Segovia, 2013).

According to several studies, such as those by Segovia (2013) and Calderón (2016), between 70% and 90% of family businesses tend to disappear by the second or third generation. This creates a wide range of competitive advantages and disadvantages for other companies, which may achieve greater performance by facing less competition in their respective sectors (Parra et al., 2017). On the downside, the deterioration of family unity often occurs when companies fail to overcome the significant crises they face daily (Calderón, 2016).

In Colombia, entrepreneurship is not a nationwide issue; instead, it is an ecosystem that some cities have developed with better results. This disparity stems from cultural factors that vary across regions. Some areas of the country traditionally rely on agriculture, yet lack state support or assistance from organizations to help communities establish new ventures (García et al., 2023). This highlights the need for greater coordination among the "triple helix" entities—private, academic, and public sectors—to train and foster entrepreneurship, which often takes the form of

family businesses (Morales & Morales, 2022). Additionally, evidence shows a higher likelihood of creating family businesses when entrepreneurs are involved than simply having relatives who own businesses. Sociodemographic factors are less determinative in these outcomes (Tarapuez et al., 2018).

Regarding the professionalization of management versus the emotionality of family leadership, the characterization of a family business is defined by its composition or participation. If a business is entirely composed of family members who are directly involved in production or services, its financial performance or profitability depends on this dynamic. In such cases, family members demonstrate greater strength when making decisions aimed at preserving wealth and future profits, collectively assuming the changes needed within the company. In contrast, non-family businesses are often more hesitant to take on new challenges (Molina et al., 2017).

Decision-making allows successors of family businesses in Colombia to "take the reins" of the company, which brings with it numerous influencing factors. One such factor is when parents or business owners, in most cases, involve young successors aged 18 to 28, who are still in university and uncertain about whether they should work in the family business or elsewhere (Lozano & Urbano, 2008).

Currently, researchers are also examining the effects of the COVID-19 pandemic, a milestone that has impacted businesses of all kinds. Studies have explored how prepared family businesses are for risks and how they manage crises. A case study analyzing the resource-based view and the capabilities of business owners found that families are resilient, though they use resources and capabilities in distinctive ways (González & Pérez, 2021).

Given the importance of marketing in organizations, particularly in small and medium-sized family businesses (SMEs), this article seeks to answer the following question: What marketing strategies can small and medium-sized family businesses adopt to achieve competitive positioning in global markets? The methodology used in this research involved a literature review, and the presentation of the information followed the necessary steps, highlighting the main findings and conclusions of the study.

This article aims to contribute to understanding the importance of marketing and family organizations, raising awareness among managers and employees about implementing strategies that create value through long-term relationships and marketing actions. These strategies are intended to build customer satisfaction and loyalty, thereby maintaining demand.

Methodology

The methodological procedure for this research involved a literature review, following the guidelines of Tranfield et al. (2003). This approach required understanding the research problem to formulate the objective and proceed with exploring various databases such as Google Scholar, Redalyc, Scopus, and SciELO. Additionally, studies on business practices were classified and analyzed to identify actions that could generate business value.

The search criteria for the exploration period focused on June 2021 to March 2022, which was crucial due to the COVID-19 pandemic. Researchers aimed to identify strategies and actions to address the crisis. However, articles from 2007 to 2022 were included, as they showed significant advancements in the topics of this study. The databases selected for the study were Google Scholar, Redalyc, Scopus, and SciELO. The search equation keywords were organized as follows: (“marketing + strategies”) + (“marketing strategies + small businesses”) + (“marketing and medium-sized enterprises”).

Inclusion criteria focused on studies that primarily addressed the keywords and involved marketing as a strategic axis in SME management. Exclusion criteria ruled out documents that did not mention marketing as a value strategy. Ultimately, 53 supporting documents were considered for developing the objective of this article.

The information was classified using the PRISMA technique, supported by Moher et al. (2014). The VOSviewer tool was employed to analyze thematic co-occurrence. This analysis was based on a search in Scopus for “marketing strategies in small and medium-sized companies,” which yielded 245 documents. The main components supporting the research were then analyzed. Using this technique, the following aspects were detailed:

1. Clarification and refinement of the research objective.
2. Classification of documents that share similar interests within the investigative process, particularly regarding applied business topics.
3. Selection of 62 documents meeting the inclusion criteria of keywords and involving marketing as a strategic axis in SME management.
4. Exclusion of 12 documents that did not directly align with the research dynamics, whether due to their focus or unclear results related to the research objective.
5. Ultimately, 53 studies were included that contributed to the knowledge base and the construction of this article.

To ensure an efficient analysis, Microsoft Excel was used to identify and organize Scopus data in a structured manner, enabling an understanding of data co-occurrence, publication timelines, and representative authors. The VOSviewer software was employed for the bibliometric analysis and visualization of data (Katoch, 2022).

Results

After collecting and analyzing the information, the generational succession components and their impact on decision-making and strategic marketing plans were determined as follows:

Strategic Marketing as a Tool for Global Competitive Positioning

Without a doubt, marketing plays a crucial role in organizations, regardless of the type of business. In an increasingly competitive and globalized world, marketing is essential for survival in the commercial sector, especially for SMEs, and even more so for family businesses. In Colombia, 70% of companies are family-owned, and the vast majority do not survive beyond the third generation. For these reasons, this article examines the role of marketing as a commercial tool and its contribution to consolidating family businesses.

A fundamental point to highlight is the role family businesses play in a country's economic activity. They generate employment and thus contribute to improving the quality of life for the population (Arenas & Rico, 2014). Another relevant aspect for analysis is the contribution of companies in terms of Corporate Social Responsibility (CSR). In marketing, CSR involves aspects of communication and relationship-building, incorporating concepts like sustainability. Companies

must align their financial efforts with environmental and CSR goals, which affects their structure and level of corporate reputation. However, more research is needed in this area, particularly in family businesses and emerging economies (Wilches et al., 2020).

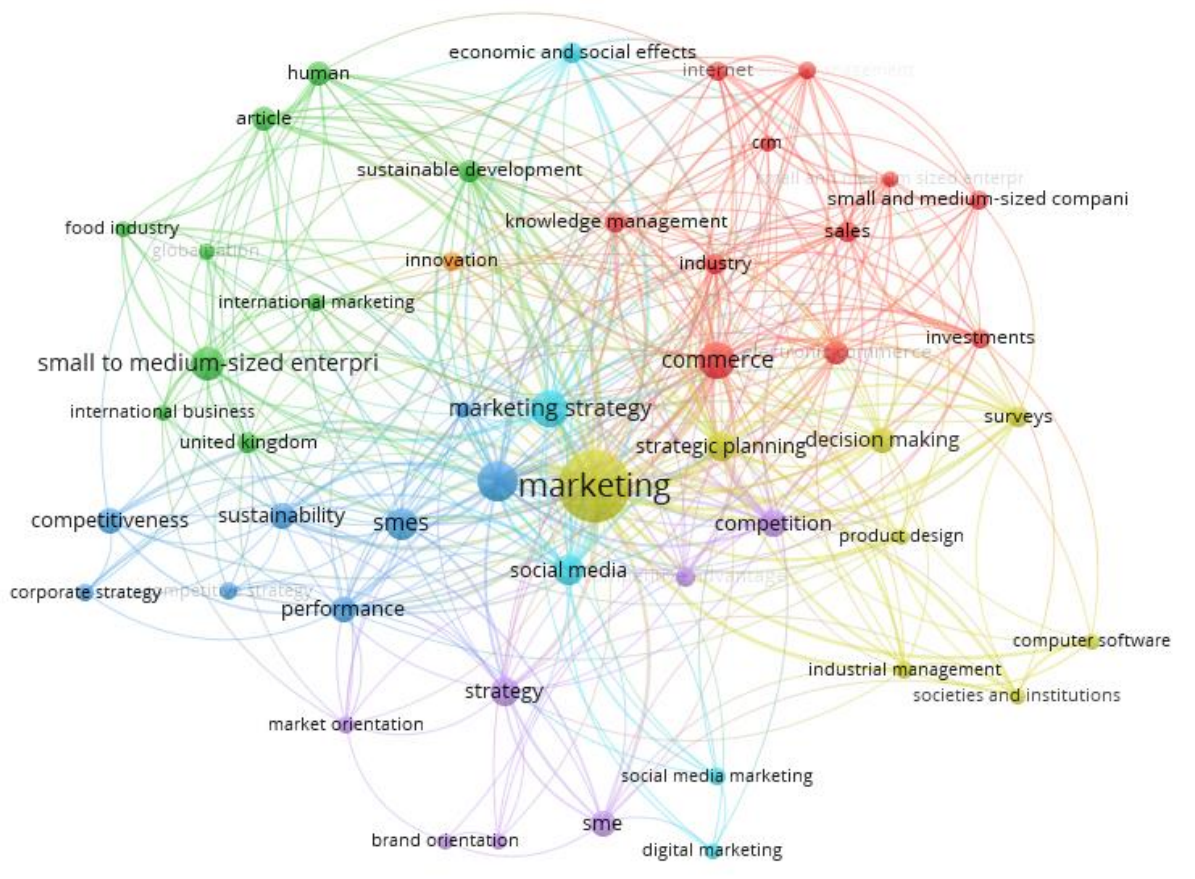
The implementation of the Balanced Scorecard in family businesses aims to improve the longevity of these types of enterprises. Typically, they generate limited results during their first five years of operation. Therefore, actions must be taken to identify problems or needs and provide solutions for these organizations. According to Méndez (2020), the Balanced Scorecard (BSC) is considered the best option for family businesses when planning and controlling activities. It improves sustainability and growth expectations in organizations, particularly concerning family dynamics and the composition of company stakeholders. This, in turn, leads to increased exports, provided there is a marketing strategy that supports business decisions (Herrera et al., 2016).

The marketing plan developed by a company should enhance and strengthen commercial processes, meet consumer expectations, manage communication and relationships with customers and suppliers, and contribute to data analysis for effective decision-making. This facilitates growth and helps achieve the company's objectives. All of this enables organizations to remain globally competitive (Ortiz et al., 2020).

Subsequently, the information was entered into the VOSviewer software. Figure 1 presents the following co-occurrence of terms:

Figure 1

Co-occurrence of Terms

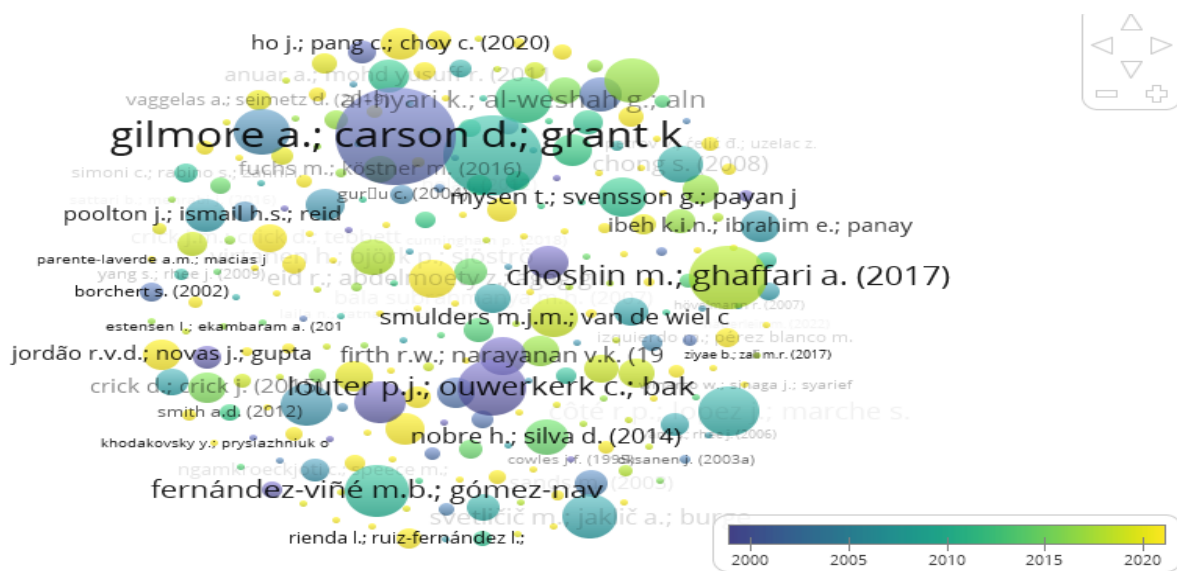


Source: Prepared by the authors using VOSviewer software.

It is observed that the most frequently occurring terms in the documents are marketing, followed by small to medium-sized enterprises, commerce, competition, sustainability, competitiveness, SMEs, and performance. Additionally, the terms are grouped into the five clusters observed with the colors green, red, yellow, purple, and blue. Subsequently, in Figure 2, a co-occurrence analysis of the authors was conducted:

Figure 2

Authors' Co-occurrence

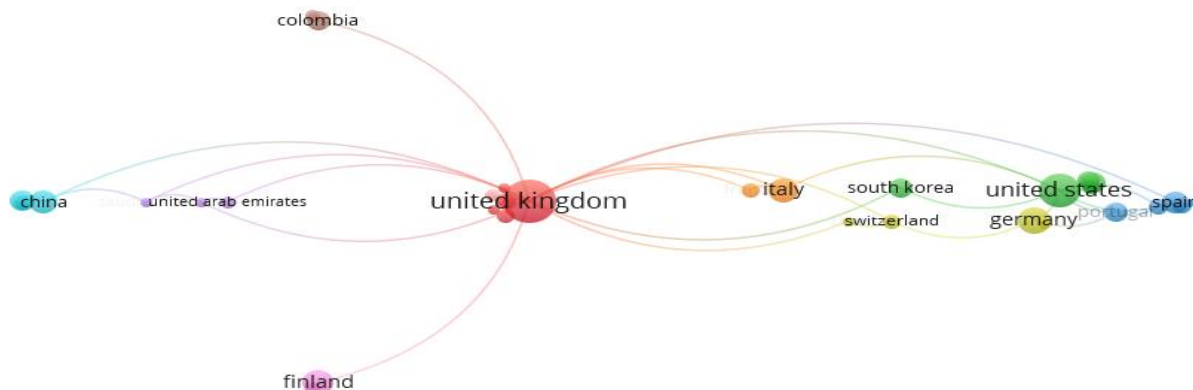


Source: Prepared by the authors using VOSviewer software.

It is observed that the authors who have studied this topic the most are: Gilmore, A., Carson, D., Grant, K. (2001); Choshin, M., Ghaffari, A. (2017); and Outer, P.J., Ouwerkerk, C., and Bakker, B.A. (2015). Finally, in Figure 3, the co-occurrence analysis of countries was conducted as follows:

Figure 3

Countries' Co-occurrence



Source: Prepared by the authors using VOSviewer software.

The countries that stand out in research on these topics are: the United Kingdom, the United States, Germany, Finland, and China.

The Importance of Marketing in Family-Owned SMEs

SMEs are currently facing significant challenges due to rapid changes and globalization, two factors that greatly influence the future of these types of businesses. Adding to this are internal conflicts typical of family-owned businesses, where pride, personal interests, and the lack of a clear and specific organizational chart outlining each individual's role in the company can create additional hurdles. These businesses are therefore compelled to turn to strategic administrative tools, such as marketing, to project themselves and achieve market positioning. This can be achieved through market actions developed on the web, aiming to convert consumers and subsequently lead them to complete purchases (Gómez et al., 2012; Meléndez, 2018).

Some studies have explored marketing strategies, emphasizing their importance in improving the performance of all types of businesses, including family-owned companies. These analyses classify strategies into financial, such as investment and capital decisions; operational, such as resource allocation in processes and products; and cooperative or strategic, such as the development of dynamic capabilities, innovation, and Information and Communication Technologies (ICTs). Well-focused marketing strategies, therefore, contribute to business success (García et al., 2022).

Nevertheless, family businesses may have positive elements compared to other types of businesses, such as value generation and financial management processes. A study conducted in the metropolitan area of Medellín revealed that family-owned businesses have advantages in planning and financial control, working capital management, capital investment, and financial decision-making. However, they often lack relevant marketing plans with clear, defined, and achievable goals (Barroso et al., 2012; Molina et al., 2020). By implementing cutting-edge technologies, SMEs in Colombia have been working to improve their innovation strategies. This is a key factor for business management not only in Colombia but worldwide, as tools like software for developing new products and services increasingly influence business performance. This positively impacts marketing performance and, consequently, the performance of family-owned

businesses. A focused, rigorous, and innovative marketing process is therefore imperative to drive impactful business outcomes (Charupongsopon & Puriwat, 2017; Baracaldo, 2013).

Approaches and Dimensions of Marketing in Family-Owned SMEs

Strategic marketing becomes a differentiating factor for successful businesses, whether large, established companies or those that started with an entrepreneurial orientation. When innovation processes are integrated, they create the capability for businesses to be dynamic and perceived differently by the end consumer (Martínez et al., 2021). The organizational culture that integrates innovation capabilities and recognizes the market level must be continuously measured, especially in family-owned businesses. Market level is a variable that drives and directs innovation within the organization; therefore, both variables grow or decline in parallel, maintaining a correlation that directly impacts the company's productivity and organizational culture (Solarte et al., 2020).

Regarding digital marketing in Colombian companies, out of a base of 109,000 SMEs in 2020, 26.3% had internet access, 7.4% offered e-commerce processes, and 5.7% used social media (Serna et al., 2020). Undoubtedly, digital marketing now plays an important role in the market for family-owned businesses. The various challenges these businesses face due to constant changes and challenges make digital marketing a key focus. As Rolla (2017) argues, a company, regardless of its size, must constantly renew itself to remain competitive. This is enhanced by technological innovations, internet use, and the integration of mobile devices into daily life, as well as the need to maintain a website. All of this allows family-owned SMEs to view this new technology as a way to connect with consumers and meet their needs more directly, efficiently, and satisfactorily.

Family businesses in Colombia still rely on traditional marketing, which is not very effective for strategic marketing. Therefore, digital marketing in these companies remains underdeveloped and lacks various tools and models (Sánchez, 2019; Somalo, 2017). The latter is characterized by the 4F features: functionality, flow, fidelity, and feedback (Hoyos & Sastoque, 2020; Selman, 2017; Vega, 2019).

Generational Succession and the Disappearance of Family Businesses by the Third Generation

Macías and Ramírez (2011) state that in family-run businesses, the owner of the company is usually the manager, thus avoiding risks associated with communication difficulties between multiple people. Having a single decision-maker provides advantages over other companies where agency risks are always a factor (Rave & Moreno, 2023).

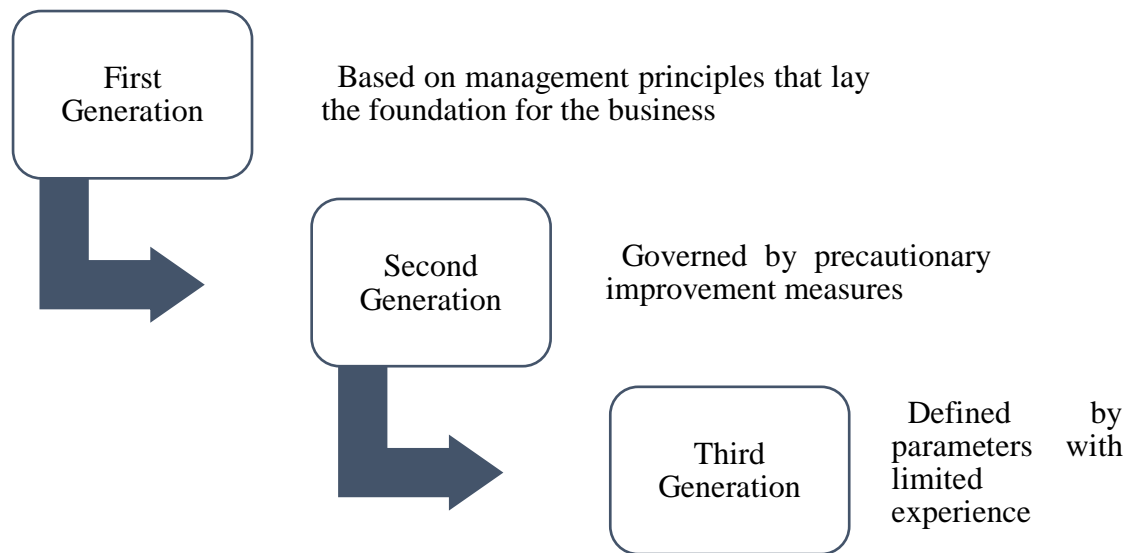
According to the Cámara de Comercio de Bogotá [Bogotá Chamber of Commerce] (2023), family businesses have contributed to the economic growth of various sectors. However, they require greater training to address day-to-day challenges. Aspects such as globalization and competitiveness present new business challenges.

Beyond generational succession, family businesses must also consider expansion to avoid disappearing. Toro et al. (2013) explain that these businesses are often unsustainable by the third generation, as core values begin to erode.

Sandoval and Guerrero (2010) conducted a study involving 30 family businesses from different productive sectors. The study aimed to create a management framework to support family-founded businesses. The main results showed that 60% of businesses were naturally established but evolved into limited liability companies due to positive outcomes over time. Figure 4 illustrates the characterization of roles across generations that manage family businesses.

Figure 4

Characterization of Roles in Family-Owned Businesses



Source: Prepared by the authors.

Portafolio (2014) explains the behavior in Colombia regarding family-owned businesses, noting that while 70% of companies are family businesses, 89% of them do not include succession or the transfer of business knowledge from parents to children in their plans. In over 70% of cases, there is no structured plan for the succession process or criteria for selecting successors. This leads to a disappointing scenario where only 10% of these businesses make it to the third generation and those do tend to disappear, with only 30% surviving generational transitions. The literature highlights that the main reason for the lack of an adequate succession process is the business owners' lack of knowledge and the absence of established protocols for this purpose. Succession protocols are an effective tool to ensure continuity, sustainability, and formalization in family-owned businesses (Arenas & Rico, 2014). Studies also analyze the role of family shareholders in majority control, value creation, and succession planning (García-Ramos & Olalla, 2011).

Rave et al. (2022) found, as a result of their research, the main components involved in the succession or business transfer process in Colombian family-owned SMEs, highlighting the following: the relationship between the successor and the owner, the transfer of capital, the planning and monitoring of processes, and the successor's experience. However, in generational

transition processes within family-owned businesses, the lack of planning becomes evident. It is necessary for the successor to show interest in the company's processes and for the founder to include generational succession in their plans, involving their family in the company's activities to foster genuine interest in the succession process.

Conclusions

As evidenced in the results, family businesses must be supported by advisors during transition processes to ensure that future generations engage with and strengthen the company. It is essential to be aware of the competition, which requires having an appropriate interdisciplinary team that facilitates effective decision-making and addresses expansion processes to prevent the company's disappearance.

In this way, family businesses cease to be merely a historical or research subject and become a key factor in economic development. These businesses actively contribute to preserving wealth across generations while continuing to add value to the industrial and commercial sectors.

Based on the findings of this research, several actions are proposed to help business owners strengthen the value proposition and ensure the continuity of their businesses:

- Build customer databases to identify their characteristics and implement personalized actions.
- Develop strategic marketing efforts to enhance competitiveness and integration into a globalized world.
- Strengthen traditional marketing, but even more importantly, focus on implementing and consolidating digital marketing tailored to business needs and current consumer behavior.
- Foster an organizational culture aligned with the marketing approach the company decides to develop.
- Establish proper succession protocols to ensure the sustainability and continuity of the company's processes and the organization as a whole.

This research is essential for understanding family businesses, as they hold a fundamental position in the global economic landscape. However, in Colombia, such businesses face challenges in

sustaining themselves over time, often due to public policies, knowledge transfer issues with new generations, and low acceptance of successors. Process management has shown improvement, with large companies leading in sustainability practices.

Government agencies promoting entrepreneurship in Colombia must pay special attention and develop strategies to safeguard family businesses during their early generations. Consequently, state support is crucial to assisting SMEs and family businesses. These businesses need ongoing training in information and communication technologies, better access to bank loans, and guidance to improve infrastructure, particularly internet connectivity, which can positively impact these companies across all Colombian regions. This, in turn, enhances the population's quality of life and boosts the country's Gross Domestic Product (GDP) (Méndez, 2020).

Finally, it is vital for family businesses to have a marketing plan managed and controlled efficiently and innovatively, tailored to the company's context and economic sector. Businesses must remain attentive to market changes and macro-environmental shifts to offer product and/or service alternatives that meet current consumer needs, ensuring their market presence.

Family SMEs are a critical component of the economy in many countries. Future research is expected to continue supporting the subject of family businesses, contributing both from academia and industry to organizational competitiveness and sustainability.

By identifying effective marketing strategies, this research can provide valuable support to companies, enabling them to improve their competitiveness and sustainability in highly innovative global markets. It also highlights successful marketing strategies in family businesses, showcasing examples of innovation and creativity in their commercial practices. This, in turn, can inspire other companies to adopt similar approaches and foster a more dynamic and competitive business environment.

Ethical Considerations

This research project was developed with a clear ethical foundation, respect, and responsibility as academic researchers. At no point does it intend to disregard the research processes of the institutions involved.

Conflict of Interest

All authors contributed significantly to this document and declare no conflicts of interest related to the article.

Author Contribution Statement

Ledy Gómez Bayona: Conceptualization, methodology, software, validation, formal analysis.

Olga Vélez Bernal: Research, resources, data curation, writing – original draft, editing, and review.

Nancy Estela Grajales Montoya: Visualization, supervision, project administration, funding acquisition.

Oswaldo Barrientos Cuellar: Visualization, supervision.

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