

In What Ways is Qualitative Research Vital to Family Business Scholarship?

A Review of Past Trends and Planning for New Futures

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Objectives

- To identify which kinds of qualitative methodologies are being utilized in family business research.
- To review the kinds of research questions and topics being addressed through qualitative methods
- To identify gaps and themes not being addressed
- Propose suggestions for future research???

Background and Rationale

- Qualitative methodologies are underutilized in the family business field.
- There is a need for a greater use of, and rigor in, the application or communication of qualitative methodologies (Nordqvist et al. (2009) and Chenail (2009)).

Why?

- For filling in gaps of knowledge in this field (Reay and Zhang, 2013),
- For capturing 'the specificity and complexity of family businesses' (Nordqvist et al. 2009, p.294).
- Qualitative methods are 'powerful tools' for developing theory (Reay & Zhang, 2013, p.5).
- Quantitative methods still dominate in family business research (cite results from annotated bibliography by De Massis et al. (2012)).
- A lack of diversity in the use of methods (case study most used)

Common themes that characterise qualitative research?

i). To explicate the ways in which people come to *understand, account for, take action and manage* their day-to-day situations from the inside.

ii). To see things in context and gain a holistic overview of the context under study.

And to work out the logic, arrangement and structuring of relationships, patterns and rules (whether explicit or implicit) in relation to context.

iii). To elucidate the sense-making accounts, behaviours, interactions, relationship patterns and structures reported during fieldwork.

And to maintain field work accounts in their original forms throughout the study.

iv). To acknowledge the role that the researcher has in the research process.

v). Theory development is iterative rather than sequential.

(adapted from Miles and Huberman, 1994, p.6-7)

Methodology

- We utilize the bibliographical database and methodology adopted by De Massis, Sharma, Chua and Chrisman (2012). articles that have been *particularly relevant* for the development of the field.
- From this, a sample of 215 articles (for 1996-2010), were categorized according to Google Scholar in February 2011 (five+ citations per year).
- Eighteen out of these 215 articles had been classified by De Massis et al. (2012) as qualitative studies and were included in the sub-sample.
- We checked the Google Scholar citations again in November 2013 (including review by Reay and Zhang (2013). This search yielded two additional articles with more than 5 citations per year (Chirico & Nordqvist, 2010; Steier & Miller, 2010).
- We also updated the search to include other articles published in 2010 with more than 10 total citations. 4 additional articles (Fletcher, 2010; Irava & Moores, 2010; Nordqvist & Melin, 2010; Parada et al., 2010)
- Two further qualitative articles were added for 2013 and which received at least 10 citations as of Google Scholar in November 2013 (De Massis et al., 2013; Kotlar & De Massis, 2013).

➤ **Total of 26 peer review articles for analysis**

Analysis of sub-sample of articles

Categorisation criteria

- Journal
- Study subject
- Research question(s)
- Definition of family business used
- Theory adopted
- Key findings
- Sample description
- Key methodological references used
- Philosophical assumptions made explicit

Sub-sample of articles selected for analysis

Bagwell, S. (2008)	Karra, N., Tracey, P., and Phillips, N. (2006)
Cole, P. M. (1997)	Kotlar & De Massis, 2013
Chirico & Nordqvist, 2010;	Lambrecht, J. (2005)
DeAngelo, H., & DeAngelo, L. (2000)	Murray, B. (2003)
De Massis et al., 2013	Miller, D., Steier, L., & Le Breton-Miller, I. (2003)
Dyck, B., Mauws, M., Starke, F. A., & Mischke, G. A. (2002)	Nordqvist & Melin, 2010
Fletcher, (2010)	Parada et al., (2010)
Graves, C., & Thomas, J. (2008)	Salvato, C., Chirico, F., and Sharma, P. (2010)
Hall, A., Melin, L., & Nordqvist, M. (2001)	Steier 2001a
Hall, A., and Nordqvist, M. (2008)	Steier 2001b
Howorth, C., Westhead, P., & Wright, M. (2004)	Steier & Miller, 2010
Johannisson, B., & Huse, M. (2000)	Tsang, E. W. K. (2002)
Irava & Moores, 2010	Vera, C. F., & Dean, M. A. (2005)

Characterising themes	Strengths and Weaknesses in FB Research
<p>(i) How people come to understand, account for, take action and manage their day-to-day situations from the inside.</p>	<ul style="list-style-type: none"> • Some attention to individual perspective but insufficient detailed attention to the daily life of social actors and detailed understanding of their sense-making or interpretations. • Lack of explicit attention to contextual factors in shaping insights. • Context assumed to be embedded in insights and not used to explain outcomes. • Tendency to aggregate and reify personal accounts to organizational or firm level to explain outcomes. • Lack of close study of group interactions and relational dynamics.
<p>(ii) To see things in context and gain a holistic overview of the context under study.</p> <p>And to work out the logic, arrangement and structuring of relationships, patterns and rules (whether explicit or implicit) in relation to context.</p>	<ul style="list-style-type: none"> • A concern for holistic perspectives to account for dynamics. • Strong use of case studies to work out arrangements and inter-relationships between factors. • Recurring use of multiple sources of data to understand complexity. • Limited attention to repeated interactions in fieldwork studies over time. • Tendency to reduce complexity and dynamics to a simple set of causal relationships devoid of context. • Lack of use of process modes of inquiry to observe flux, change, movement and flow of organizational life.

Characterising themes	Strengths and Weaknesses in FB research
<p>ii). To see things in context and gain a holistic overview of the context under study.</p> <p>And to work out the logic, arrangement and structuring of relationships, patterns and rules (whether explicit or implicit) in relation to context.</p>	<p>Use of direct quotations from respondents to show authentic experience.</p> <p>Examples of displaying and reducing extensive amounts of data.</p> <p>Linguistic phrases are presented as objectified collection of words devoid of contextual explanation.</p> <p>Overlooks the role of language and discourse in constituting meaning.</p> <p>Opportunities to ‘go deeper’ to examine subtle cultural, political or structural issues are overlooked.</p>
<p>iii. To elucidate the sense-making accounts, behaviours, interactions, relationship patterns and structures reported during fieldwork.</p> <p>And to maintain field work accounts in their original forms throughout the study.</p>	<p>Lack of transparency and detailed discussion of audit trails showing analytical processes and theory development.</p> <p>Lack of reflexivity and transparency on the role of the qualitative inquirer in gaining access to fieldwork, building rapport, and undertaking analysis.</p> <p>Absence of practices for sharing fieldwork findings with respondents.</p>

Characterising themes	Strengths and Weaknesses in FB research
<p>iv. To acknowledge the role that the researcher has in the research process.</p>	<ul style="list-style-type: none"> • Lack of transparency and detailed discussion of audit trails showing analytical processes and theory development. • Lack of reflexivity and transparency on the role of the qualitative inquirer in gaining access to fieldwork, building rapport, and undertaking analysis. • Absence of sharing fieldwork findings with respondents
<p>v. Theory development is iterative rather than sequential.</p>	<ul style="list-style-type: none"> • Efforts to report new theory through qualitative methods – i.e. describing and exploring what is not usually seen • Use of theoretical propositions to extend existing theory. • Efforts to introduce new concepts and conceptualizations. • Lacking detail on what it means to develop theory through iterative processes. • Difficult for reviewers to assess how theoretical insights or new theories are claimed. • Too much effort to trace specific outcome variables to pre selected predicted correlations. • Tendencies to over simplify complexity and dynamics to a set of simple causal relationships devoid of context. • Too much effort attached to searching for a single truth or explanation (rather than emphasizing multiple truths). • Philosophical roots seldom made explicit.

Conclusions: What is required to expand qualitative research

- Use wider range of methods that allow detailed attention to the actions and understandings from the point of view of the reported accounts of individuals or groups of people.
- Display fieldwork material through words, language, symbols, images and privilege the original meaning and intentionality of the respondent(s)
- Demonstrate sensitivity to context process and gain a holistic view of social phenomena. Induce theory from contextual insights.
- More transparency about the researcher-stance during the research process and the audit trail from sensitizing concepts to fieldwork activity and analysis.
- Make explicit how theory development emerges and consider that many interpretations are possible but some are more compelling for theoretical reasons or on grounds of internal consistency. To work closely with respondents to develop theory in line with their viewpoints and perspectives.

Thank you for listening

Questions and comments are welcome!