



Qualitative research practices and family business scholarship: A review and future research agenda



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ABSTRACT

In spite of various calls for a wider application of qualitative research in the family business field, it is our contention that the full potential of qualitative inquiry is not being fully realized. Part of the reason for this relates to the tendency to promote methods choice and diversity rather than addressing the foundational questions and processes which underlie qualitative research choices. These tendencies obscure attention to the reasons why researchers choose qualitative methods and the kinds of foundational issues about family businesses that are brought to light through qualitative research. To address this, we undertake an analysis of the most-cited articles using qualitative methods from an annotated bibliography of family business studies. From this, we identify the strengths and weaknesses of extant qualitative studies in family business research and argue for the need to re-orientate calls in family business research towards the foundational questions (rather than methods) that underline qualitative inquiry.

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1. Introduction

In spite of various calls for improvements in the use and communication of qualitative research approaches in family business research (Chenail, 2009; De Massis & Kotlar, 2014; Nordqvist, Hall, & Melin, 2009; Reay & Zhang, 2014), qualitative inquiry is still relatively under-realized in published research output. An analysis of the 215 most-cited family business studies from the annotated bibliography by De Massis, Sharma, Chua, & Chrisman (2012), for example, reveals that the majority of empirical studies are quantitative (87.3%), with only a minority of articles (18) relying on qualitative methods (8.4%). Also, in a literature review by Reay and Zhang (2014), the authors identified 78 articles from a possible 656 in their sample that used qualitative methods.

This under-utilization of qualitative methods is surprising for at least two reasons. First, the tradition of family business research has

strong roots in business history, economic sociology and social anthropology where a wide range of research tools often associated with qualitative research (such as ethnography, participant observation and family memoirs archives/photographs/diaries), have been employed (Colli, 2012; Stewart, 2003, 2014). Second, the under-realization of qualitative methods is also surprising given the surge of interest in qualitative inquiry in other areas of organization studies (Buchanan & Bryman, 2009) including the general management field (Alvesson & Deetz, 2000; Corley, 2011; Pratt, 2009; Thorpe & Holt, 2008) and sub-fields such as entrepreneurship (Neergaard & Ulhøi, 2007) and strategy (Fenton & Langley, 2011). Such discussion, as noted by Alvesson & Sköldbberg (2000, p.4) referring to Silverman (1985); Denzin and Lincoln (1994), means that qualitative methodological discussions are well developed in other areas of the social sciences to the point that they even predominate in some.

In the specific domain of family business research, however, the full potential of qualitative research practices is not yet fully being realized. Many authors refer to the aptness of qualitative methods for studying human behaviors, fine-grained processes and the complex and tacit processes that characterize family firms (Melin & Nordqvist, 2007; Nordqvist et al., 2009; Fletcher, 2014; Reay & Zhang, 2014; Zellweger, 2014). Some refer to traditions from sociology (Martinez & Aldrich, 2014), anthropology (Stewart, 2014), family science (Jennings, Breitkreuz, & Jones, 2014) and

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psychology (Von Schlippe & Schneewind, 2014) to raise new directions, theories and methods for family business research. But still we lack detailed understanding of what Miller et al. (2015) refer to as the ‘Janus-faced’ nature of family firms and their associated dualistic (Jackson, 1999) and paradoxical tendencies (Lewis, 2000; Smith & Lewis, 2011).

This lack of full realization of the potential of qualitative research practices can be partly explained by the tendency to refer to ‘qualitative methods’ as if there is a readily available repository of identifiable qualitative methods, tools and techniques that can be drawn upon to aid certain kinds of analysis. In family business research, for example, recent articles have called for improvements in the use, rigor and communication of qualitative methods (Chenail, 2009; Reay & Zhang, 2013; Reay, 2014). Reay and Zhang (2013, p. 28) encourage researchers to develop ‘well designed and appropriately-implemented qualitative studies’ for developing theory. Also, in Reay and Zhang (2014), seven strategies for getting qualitative research published are outlined. Such commentaries help to encourage more systematic usage and technical production of qualitative methods and better communication of qualitative research strategies. An issue that is somewhat overlooked, however, is why family business researchers choose to adopt qualitative methods and what kinds of issues and processes they are trying to uncover.

Using the term ‘qualitative methods’ appears to be useful for signaling the use of discursive and context sensitive fieldwork material as distinct from numerical data. It is clear that they offer a series of techniques or methods for examining discursivity, dynamic processes, complexity, contextualization, relationality and fine-grained detail. But to what extent do we fully extend the potential of research methods for examining the nuances of these processes in family business settings for examining paradox, contradictions and dualities? Also, it is reported that qualitative methods are ‘powerful tools’ for developing theory (Reay & Zhang, 2014, p.5) but in what ways can we engage more directly with qualitative methods to develop theory? Furthermore, in referring to the term ‘qualitative methods’, this tends to assume that there is ‘a fixed battery of methods’ (Stewart, 2014 p.77 referring to Malkki, 2007, p.180¹) that can be drawn upon to fill in gaps or explore unknown phenomena. In research practice, however, qualitative inquiry encapsulates ‘multiple practices . . . and vocabularies . . . which acquire different meanings in their use’ which means that they ‘form something more like a constellation of contested practices’ (Patton, 2002p.76 referring to Schwandt, 1997 p.xiv) rather than a finite list of proven tools and techniques. This diversity and the lack of a fixed template or ‘boilerplate’ (Pratt, 2009) for undertaking qualitative research means that there is more emphasis on technical improvement of qualitative methods rather than the scholarship potential of qualitative inquiry.

In this article, our concern is to re-orientate family business research interests towards the foundational questions (rather than methods) that underline qualitative inquiry. We argue that in addressing these foundational questions through qualitative research certain issues about family businesses are brought to light. Moreover, not only does this encourage a qualitatively oriented social science that is ‘methodologically sound’ but it also moves us in the direction of realizing methods that ‘are [well] suited to family business studies’ (Stewart, 1998, 2014, p.67).

In what is to follow, we undertake an analysis of the most-cited articles from an annotated bibliography of family business studies that have adopted a qualitative method or mode of inquiry. In Section 2, we outline the significance and meaning of qualitative

research. Then, we review the kinds of research questions and topics being investigated with the use of qualitative methods, identifying their strengths and limitations. Finally, we provide a framework for re-orientating family business researchers to the foundational questions underlying qualitative methods choices. We conclude with suggestions for new and fruitful lines of inquiry for family business research with a view to fully extending the potential of qualitative research for addressing issues of contradiction and paradox in family business.

2. What is the challenge and why do we need more scrutiny about qualitative research practice in family business research?

Two decades ago, Levin (1993) argued for the significance of moving from close and non-problematized views of family to perspectives and approaches which try to accommodate the complex issues drawn from the everyday experience and interpretations of family business members and employees. Since then various efforts to address the nuanced and complex social realities of family firms have been made. These include: work on notions of ‘familiness’ or family influence to highlight the special cultures, values, orientations, ‘living moments’, emotions and particular ways of organizing (De Massis & Kotlar, 2014; Melin & Nordqvist, 2007; Brundin & Nordqvist, 2008; Helin, 2011); efforts to stress the specificity and complexity of family businesses (Fletcher, 2004; Nordqvist et al., 2009, p. 294) using, for example, concepts of ‘collective mindfulness’ (Zellweger, 2014), as well as studies on the social relations or kinship patterns in groups, communities and societies (Stewart, 2003).

Such inquiries are distinctive because they tend to be less driven by empiricist techniques searching for ‘data’ and linear causal explanations that enable prediction. Instead, they are more concerned with understanding and reconstructing activities as they occur in practice in a particular socio-cultural-political context. For example, in making a plea for ‘an imagined ideal’ Stewart (2014, p.66) orientates researchers towards the kinship (rather than business) side of family business matters in order to give ‘attention to the sources of solidarity and conflict, to cultural variation and to the lived experience of kinship’ (p.66). A further example is Ainsworth and Cox, (2003) where the authors encourage us to examine issues of resistance, control, consensus, dissensus, subordination and asymmetrical relations as they shape family firm activity or behaviors. Zellweger (2014) also advances our thinking to go beyond the dualism perspective of family firms by drawing attention to the ‘power of anomalies and paradoxes’ (p.653). Conceptually, he introduces family businesses researchers to the notion of ‘collective mindfulness’ as a means to understand how families manage and negotiate synergies between family and firm dualities. A paradox or duality perspective is relevant for family business research because it simultaneously considers two opposite principles which might form an entity without becoming a unity (Jackson, 1999; Lewis, 2000). Examples of paradoxes from the family business literature are: family and enterprise (Fletcher, 2000), or ‘family and business’, ‘private and public’, and ‘informality and formality’ (Nordqvist, 2012). Another example is the ability and willingness paradox in family firm innovation (Chrisman, Chua, De Massis, Frattini, & Wright, 2015). These perspectives imply that analyzing just one pole of the duality or paradox does not capture its underlying logic. Moreover, these research efforts signify a demand in family business research to understand complexity and to give ‘voice and legitimacy to those tacit and oftentimes unrepresentable forms of knowledge that modern epistemology inevitably depends upon, yet conveniently overlooks or glosses over’ (Chia, 2008, p.162).

Qualitative inquiry is particularly appropriate for understanding contradictions, tensions, paradoxes and dualities in family

¹ These authors are both referring to ethnography but the same argument applies to qualitative methods.

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