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# The use of qualitative case studies in top business and management journals: A quantitative analysis of recent patterns

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## ABSTRACT

The use of case studies as qualitative research strategy in social sciences seems to have increased recently, but there are no studies that empirically verify such claim. By explicitly focusing on the field of business and management studies, we aim to investigate the extent of publication and the main features of qualitative case studies published in the 20 highest impact factor business and management journals. The paper discusses the correlation between a journal's ranking and the extent of case studies it published, and between selected features of case studies (e.g. research purpose, design and data sources). Moreover, we shed light on how the identified features of a case study impact its probability of being published.

Methodologically, we analyse by means of correlation and regression statistics, as well as clustering techniques a total of 19 features in the 352 qualitative case studies published between 2002 and 2011 in our sample of top business and management journals.

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## 1. Introduction

Qualitative case studies are an established research method that has been used since the dawn of the social sciences (George & Bennett, 2005: 5). Case studies are applied extensively in several subject areas, including psychology, sociology, history, economics and management (Yin, 1994).

A qualitative case study can be defined in many ways; two well-known definitions are a “detailed examination of an aspect of a historical episode to develop or test historical explanations that may be generalizable to other events” (George & Bennett, 2005: 5) and “an empirical inquiry that investigates a contemporary phenomenon within its real-life context; when the boundaries between phenomenon and context are not clearly evident; and in which multiple sources of evidence are used” (Yin, 1994: 13).

Many well-known and established theories in the field of

management stem from qualitative research grounded in case studies: for example Penrose's theory of the growth of the firm (1959), Chandler's theory of the firm (1977), Johanson and Vahlne's theory of incremental internationalization (1977) or, more recently, von Hippel's theory on user-related innovation (1988). Case studies have in fact the merit of enabling theory building and development more than quantitative research approaches (Tsang, 2014); or, in the words of Gephart referring to qualitative research, to which case studies belong, it “often advances the field by providing unique, memorable, ... and theoretically meaningful contributions to scholarly discourse ...” (2004: 461). Another important merit of qualitative case studies lies in their capability of explaining complex connections between phenomena and their contexts (Dubois & Gadde, 2002). In addition, case studies offer the opportunity of adopting and matching different forms of data, enabling a more in-depth understanding of a phenomenon (McCutcheon & Meredith, 1993), which is particularly important in the field of management, where some specific managerial processes are otherwise very difficult to investigate (Guercini, 2004; Voss, Tsiriktsis, & Frohlich, 2002).

Despite these merits, in the 1960s and 1970s, qualitative case studies experienced a decline in favour of statistical and formal methods (George & Bennett, 2005). Even if produced by the same

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academic institutions, quantitative research is viewed as more “scientific” (Gummesson, 2006: 171) and qualitative research as lacking rigor (Pratt, 2008). As a result, some authors (Hannah & Lautsch, 2011) argue that the management field is being dominated by quantitative methods.

Stressing the aforementioned merits, other authors claim instead that the use of case studies, which represents one of the most established qualitative research methods to build and even test theories (Tsang, 2014) in the social sciences, has increased in recent years (Dubois & Gibbert, 2010; Eisenhardt & Graebner, 2007; George & Bennett, 2005; Hunt, 1994).

This paper empirically verifies this claim that the use of qualitative case studies has increased recently, but since it would be too demanding to investigate all the social sciences, we chose to restrict our focus to management and business studies. However, since this field includes hundreds of journals, we chose to further restrict our focus to the scientifically most influential management and business journals, because they represent the main forums for advancement and consolidation of the discipline of management. Thus, the purpose of this paper is *to investigate the extent of publication and the main features of case studies published in top management and business journals in recent years.*

This research purpose is further specified into four research questions, which will be developed in our theoretical section and which concerns: (1) *the correlation between journal ranking and the extent of case studies published*, (2) *the main features of these case studies (such as their research purpose, design and data sources)*, (3) *the relationships between these features*, and (4) *the impact of these features of a case and the probability of its being published*. To accomplish our purpose and address our four research questions, we conducted a large-scale quantitative statistical analysis over all case studies published in the 10 years between 2002 and 2011 in 20 scientifically leading European and U.S. journals (ranked based on their ISI impact factor).

Previous reviews on the use of case studies in management and business studies do not analyse the whole field, but focus on specific subdisciplines, such as operations research (Stuart, McCutcheon, Handfield, Mclachlin, & Samson, 2002), information systems (Dubè & Parè, 2003), industrial marketing (Beverland & Lindgreen, 2010), management accounting (Otley & Berry, 1994) or international business (Piekkari, Welch, & Paavilainen, 2009). Many of these reviews have the merit of digging deep into the requirements for successful case research and the connections between the various dimensions of case studies (e.g. purpose, research strategy, unit of analysis, timespan), but these reviews restrict themselves to analyzing only a few dozens of case studies each. To complement those studies and fill this research gap, our study embraces the top journals in management and business studies as a whole and conducts a statistical analysis of 352 articles that employ case studies as a research method. Such a large-scale and quantitative approach enables one to identify broader patterns in the use of case studies. However, since our method's breadth does not allow in-depth content analysis, we do not discuss such issues as the nature or quality of the findings of the examined articles. For the same reason, we do not discuss whether case study is a methodology that is difficult to adopt or is useful in carrying out a particular research endeavour (Dubois & Gadde, 2002), nor the conditions for performing high-quality case research (Cepeda & Martin, 2005). Instead, we focus our investigation on the *extent* to which qualitative case studies appear in mainstream management journals as well as on the *main features* of the published case studies. The dominant features – such as theory-building purpose or longitudinal case approaches – can be viewed as an indirect indicator of current “standards” required for publishing case studies in top management journals. The remainder of this paper is

organized as follows: Section 2 reviews the literature on case study methodology in order to identify relevant dimensions of case studies and formulates four specific research questions, Section 3 presents our methodology and Section 4 describes our results and provides our analysis. Section 5 concludes the paper with a summary of our findings, and a discussion of our study's limitations as well as further research avenues.

## 2. Literature review: identifying relevant dimensions to define trends in case study research

The case study represents a widely employed qualitative method to carry out research in management disciplines. This method can be defined from its unit of analysis as a “research method that involves investigating one or a small number of social entities or situations about which data are collected using multiple sources of data and developing a holistic description through an iterative research process” (Easton, 2010: 119). One of the main reasons behind the substantial use of the case study method in qualitative research lies in its enabling the researcher to study a phenomenon in a real-life setting where often it would be otherwise difficult to grasp its dimensions (Stake, 1995; Yin, 1994). According to Eisenhardt (1989), case studies are particularly useful to investigate phenomena characterized by little empirical substantiation, namely situations where little is known about a phenomenon, current perspectives seem inadequate and there is a gap in existing theory (Barratt, Choi, & Li, 2011). Thus, case studies have the ability to allow develop and build theories (Gephart, 2004; Tsang, 2014).

However, Dubois and Gibbert (2010) point out that, despite these recognized merits of case studies and their increased adoption by management researchers since 1990, there are still concerns widespread in the research community about their methodological rigor in terms of reliability and validity. Although there is a lack of specific studies that systematically investigate this assumption, there seems to be a general preference by top management and business journals to publish quantitative research at the expense of qualitative case studies: as reported by Pratt (2008), research based on qualitative approaches has to overcome more ‘barriers’ for being published in leading management and organizational American journals compared to quantitative studies. Similarly, Gioia, Corley, and Hamilton (2012) point out how the lack of rigor which characterizes many qualitative articles can affect their chance to be published in leading journals. Further, the calls by top journals such as ‘Academy of Management Journal’ to encourage qualitative research submissions (Bansal & Corley, 2011) clearly indicate that qualitative papers are under-represented. Otley and Berry (1994) and Stuart et al. (2002) report similar calls to increase the share of qualitative case studies published within the specific domains of management control and operations management respectively. If there appears to be a “need” for more qualitative case studies, a first important issue addressed by the descriptive statistics of this paper is to verify the extent to which top management journals actually fulfill this need by measuring the share of case studies they have published over time.

A further issue relates with which particular journals, among the scientifically leading ones, do indeed “walk the talk” more than others. In this regard, one can assume that the journals with the highest impact factor represent the mainstream approaches and would entail the highest barriers for case studies, so that the higher the impact of a journal and the fewer case studies it will publish. Following this reasoning, our first research question is as follows:

**RQ1.** *Is there any correlation between journal ranking and the extent of case studies published in top management and business journals in*

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