

# SUCCESSION IN FAMILY FIRMS – NEXT GENERATION PERSPECTIVE AND USE OF QUALITATIVE RESEARCH METHODS

ANNA AKHMEDOVA  
UIC Barcelona

**Abstract:** Succession is a cornerstone issue in family firm business. Research confirms that only 30% of family firms successfully undergo the process of transition from first to second generation successfully, and only 10-15% transit from second to third generation. Research shows that “next generation perspective” is key to successful generational transitions. Within this issue, “daughter perspective” has recently gained special attention due to underrepresentation of women, in general, and daughters, in particular, in family businesses. This underrepresentation is alarming as family firms are losing valuable human capital. In this paper a systematic review of literature in three areas is done: “next generation perspective on succession”; “daughter perspective on succession” and “women in family firms” in order to gain insights into progress researchers have made in these areas and methods of research that contributed most. Contrary to predicted, it was found that qualitative research methods are of special use in area of “daughter perspective”. Results are discussed.

**Keywords:** *Family relationships, family and economy, research methods*

## Introduction

Presently, quantitative methods are becoming dominant analytical tool in family business research based on the relative frequency of appearance of quantitative articles in leading scientific journals (Hair, J. and Sarstedt, M., 2014). Some authors even claim that publishing scientific papers in the area of family firms might be difficult without usage of quantitative methods of research (Hair, J. and Sarstedt, M., 2014).

Doing a literature review of EBSCO database, I noticed that qualitative methods construct significant part of research in literature on succession (Overbeke, K. et al 2013), (Otten-Pappas, D., 2013), (Sharma, P. and Irving, P., 2005), (Curimbaba, F., 2002). Thus the aim of the paper is to analyze the impact of qualitative methods in family firm succession literature – specifically in the part of literature that is focused on experience of the next generation in order to see if the statement about hegemony of quantitative methods is correct.

The paper will proceed in a following way: first, I will introduce family firm and succession. Secondly, I will briefly revise qualitative and quantitative methods of research. Finally, I will make a summary of papers in areas of interest to see relative contribution of qualitative and quantitative methods.

## **Family business**

Depending on how family business is defined and country, the estimation of economic contribution may vary on average 30 – 60 % of the national GDP and 30-60 % of workforce.

The research on family business continues to grow due to the growing demand on part of businesses and growing public policymakers` awareness of the role of the family business in creating jobs, diversification of economic activity and promoting economic development.

Succession is the cornerstone issue in family business, which origin is based rather in psychology and human disciplines, but which influence often spreads over business issues. Specifically, succession becomes a problem when family growth is not bolstered by corresponding business growth and thus leads to the clash of interests of family members. Depending on the definition of family firm and country, researchers report threshold of 30 % for successful successions for second generation and 15% for the third.

Succession in family firms is usually viewed by researchers as a long process, which starts long before the actual replacement with preparation of next generation successor (Lambrecht, J. and Donckels, R. 2008), (Mazzola, P. et al. 2008). It is also usually viewed as extreme case of administrative succession as transition occurs on the edge of two generations (Miller, D. et al. 2003).

Evaluation of succession process is a separate topic in family firm literature. When evaluating succession, normally, two targets are sought: quality and effectiveness. Quality is a reflection of how the involved family members personally experience the process, while effectiveness is more related to how others judge the outcome of the succession.

### **1. Next Generation Perspective On Succession**

Perspective of the next generation is critically important for quality and effectiveness of succession (Handler, W., 1989), (Handler, W., 1994), (Sharma, P., 2004). Following original work of Handler, W., (1989), research has focused in three general directions: (1) desirable successor attributes, (2) performance enhancing factors, and (3) reasons these family members decide to pursue a career in their family firms.

First, among attributes of desirable successor, “integrity” and “commitment to business” ability to gain respect of nonfamily employees, decision-making abilities and experience, interpersonal skills, intelligence, and self-confidence (Sharma, P., 2004). Second, for the performance enhancing factors, transfer of tacit knowledge of the firm and social networks of the founder (thus, good relations and early inclusion in family business is critically important).

Finally, the desire to enter the firm might be based on different feelings and reasons. Sharma, P. and Irving, P. (2005) provide collectively exhaustive and mutually exclusive model of reasons to join the family firm based on the types of commitment of the next generation. Miller, D., (2003) provides evidence on how father-son relations might affect the type and consequences of succession.

Looking at the outcomes of research in this directions, (see appendix 1) there are two types: first, descriptive frameworks with typologies (Stavrou, E., 1998), (Miller, D., 2003), (Sharma, P. and Irving, P., 2005), (Lambrecht, J. and Donckels, R., 2008); second, cause-relation framework with satisfaction (dissatisfaction) or positive (negative) financial result as dependent variables (Zellweger, T. et al. 2011), (Stavrou, E., 2005).

## **2. Women in Family Firms**

Research confirms that female career impediments: invisibility, role stereotyping, work-life conflict and incongruity between leader role and gender role work similarly in family firms. This confirmation is especially sad in case of family firms, as these firms are losing might be losing important soft skills brought by women: “loyalty” and “sensitivity” to family and firm needs; and, “flexibility” in respect to roles played in the firm (Sagalnicoff, M., 1990), (Gillis-Donovan, J., 1990).

“Invisibility” is considered one of the greatest career impediments for women. Irrespectively of the status in the firm – daughter, wife or a business partner – a term “invisible” or “hidden” has been used to describe the role of that woman (Hamilton, E., 2006), (Marshack, K., 1994), (Poza 2001), (Fernández Pérez, P., 2007), (Colli, A., 2003), Incongruity between a leader role and gender role (or a family role) is another often mentioned problem (ELY, R., 2011), (Powell, G., 2010), (Maleki, N. et al. 2011), (CHENGYAN, L., 2013), (Eagly, A., 1990), (Eagly, A., 2003).

Majority of articles devoted to women in family firms are quantitatively testing hypothesis based on previous research on gender in business. One article from the sample (see appendix 1) is using in-depth interviews and provide unexpected refinements to existing literature: women advance in career as fast as men, although they do not always want to advance; women do not accept traditional roles and play same roles as do men (Cole, P., 1997). Another article

using mixed methods provides robust results on the position and roles women play in family business (Sagalnicoff, M., 1990).

### **3. Daughter Perspective On Succession**

Majority of articles I found on daughters` perspective (see appendix 1) try to answer the question: “why female underrepresentation happens in family firm?” (Dumas, C., 1989; Jimenez, R., 2009; Wang, C., 2010) and “how females, who effectively undergone succession, managed to do it?” While answering these questions researches describe emergent themes, which in perspective are consistent across articles and create emergent theory. Further I will take look at main topics.

Answering the first question, researchers are trying to “borrow” themes from parent areas: invisibility; employee rivalry and need to work harder to prove themselves; work-life balance; glass ceiling and etc. (Vera, C. and Dean, M., 2005), (Cole, P., 1997); however, the use of flexible research methods brings genuine themes. Overbeke, K. et al. (2013) interviewing 21 male and female successors, including 8 females who had opportunity but did not used it. Researchers provide evidence of daughter`s own blindness to the opportunities in family firm, blindness resulted from automatically applied gender norms and stereotypes.

Answering the second question, researchers cite the theme of *disruptive event* as a starting point to consider leadership in family firm is repeated across studies (Wang, C., 2010), (Overbeke, K. et al. 2013), (Dumas, C., 1989). Wang, C. (2010) argue that father daughter succession compared to father-son may offer benefits as due to psychological reasons, daughters are not fighting with their male-parent for power and control and prefer to collaborate and seek interdependent relations.

Two articles are taking another dimension and create typology of daughter successions (Curimbaba, F., 2002), (Otten-Papas, D., 2013). Curimbaba proposes typology of heirs: invisible, professional, anchor and Otten-Papas tests the model work commitment as a typology of motivation to enter family firm.

### **Qualitative and quantitative methods of research**

Some scholar papers on research methods state that *quantitative* methods are becoming dominant analytical tool in family business research based on the relative frequency of appearance of quantitative articles in leading scientific journals (Hair, J. and Sarstedt, M. 2014). These authors even claim that publishing scientific papers in the area of family firms might be difficult without usage of quantitative methods of research (Hair, J. and Sarstedt, M., 2014, p.1). A recent annotated bibliography of the 215 most cited family business studies

from 1996 to 2010 has shown that only a scant minority of articles (18) relies on case studies or other qualitative methodologies (De Massis, A. et al., 2012).

The difference between quantitative and qualitative research is often seen as fundamental. Quantitative research is deductive and hinges on the presence of a hypothesis, which is identified before research begins. Qualitative research is inductive and does not require a hypothesis in order to start the research process.

Two research methods as well differ in underlying philosophies and world views of researchers in the two ‘paradigms’ or ‘epistemologies’.

Positivism is what underlies quantitative research. Positivism contends that there is a single reality and the work of researchers is to uncover this reality using objective research methods (Firestone, W., 1987). In its extreme form positivism contends that the world can be understood through some fixed laws of cause and effect, which should be tested by detached and unbiased scientific thinking.

Constructivism or qualitative research emerged as an alternative to the positivism as researchers tried to examine the context of human experience (Schwandt, T., 2000). Researchers who work within the constructivist paradigm believe that there is no common truth, and that reality is constructed by researcher (Appleton, J., and King, L., 2002).

The extreme relativist position is obviously as problematic as the extreme positivistic one. The terms *post-positivism* and *pragmatism* arise from the critics of extremist views on the research paradigms. *Post-positivists* admit that it is impossible to uncover objective reality. However realizing that subjectivity is inevitably shaping the understanding of reality, they still believe that it is possible approximate the single reality through quantitative research methods.

The *pragmatist approach* to research consists in using different methods depending on the research question. Pragmatism philosophy developed by Peirce, Dewey and James in USA contends that the meaning and the truth of any idea are a function of its practical outcome(s). Pragmatism paradigm leads researchers to use quantitative, qualitative or mixed methods whenever this use is appropriate. Thus, it is in the best interest of researcher to understand practical applicability of one or another research method.

## **Method**

A systematic review of several most important full-text collections (EBSCO, Elsevier ScienceDirect, Emerald Management Xtra, JSTOR, Sage, SCOPUS, Springer and Wiley Interscience) was conducted in order to find articles on the daughter perspective on succession in family firm.

## Findings

First, 11 articles were found on the topic: *daughters' successions* - articles, published between 1989 and 2014 (See Appendix, table 1). Second, 8 articles were found on the topic: *next generation perspective* on succession in family firm. Articles were published between 1998 and 2011 (See Appendix, table 3). Finally, 6 articles were found on the topic: *role of women in family firm* (published between 1990 and 2007) (See Appendix, table 2).

Journals, in which the articles on daughter perspective were published: Family Business Review – 5, Journal Of Family Business Management – 3, Journal Of Family And Economic Issues – 1, Journal Of Family Business Strategy – 1, Handbook Of Research On Family Business – 1.

Seven out of eleven (63%) articles were using interviews, including in-depth interviews. One was a qualitative meta-analysis, one used Analytic Hierarchy Process (AHP) which is an Eigen value approach to decision-making; finally, two (18%) were using quantitative methods.

In cluster of next generation perspective, four out of eight papers (50%) use qualitative method, three (37,5%), use quantitative and one uses meta-analysis.

In cluster of papers on women in family firm, only one out of six papers uses qualitative method, three use quantitative, two - mixed and one – meta-analysis.

## Discussion

As it can be seen from this small experiment, the topic of next generation perspective on succession in family firm is quite often explored with qualitative methods, specifically in-depth interviews and case-studies. This finding looks even more interesting given the overall unpopularity of qualitative methods in family business research (18 papers out of 215 most cited papers according to De Massis, A., et al. (2012).

There could be various explanations. First, qualitative research has a lot of explanatory power, which is perfect to explain why individuals behave in a certain way or how social system function. This explanatory power combined with data gathering flexibility, which allows delving deeper into psychological processes, provides especially good combination to those who study succession, which has a lot about attitudes, values and motives.

Second, asking open-ended questions provides the advantage of obtaining information not anticipated by researcher. For example, neither literature on next generation perspective nor on women in family firms would suggest importance of role of “disruptive event” that is often mentioned by researchers in daughter succession literature. Disruptive event is often mentioned as start-

ing point of daughters to consider leading role in family firm (Dumas, C., 1989), (Wang, C., 2010), (Overbeke, K., et al., 2013) and it will impossible to deduct it without using qualitative methods of data gathering.

Third, qualitative research methods allow identifying and exploring particular area: building theories (Eisenhardt, M., 1989) and refining and extending existing ones (De Massis, A. and Kotlar, P., 2014). There is a tendency in family business to adopt distinctive theories from other business management areas (Sharma, P., 2003); as well there were successful attempts to bring knowledge from other areas to daughter succession topic, e.g. (Overbeke, K., et al., 2013) or (Otten-Pappas, D., 2013); however, also, there were attempts to build holistic models from scratch (Curimbaba, F., 2002), (Miller, D., 2003).

Forth, succession still remains a topic, where separation of object of research from background information is not always productive and using qualitative methods benefits from describing individual choices without separating from its context. Daughter motivation, values and beliefs often depend on daughter-father and daughter-mother dyads (same true with sons), thus, one should consider complexity in order to obtain precise results.

Finally, contrary to what state some authors, no correlation was found between method of research and number times the article was cited. Nether correlation exists between method of study and ability to publish paper in “A” category scientific journal.

## **Conclusions**

The benefits of using qualitative methods have been discussed in detail on the example of one area in family firm theory. As it can be seen, quantitative and qualitative methods are complementary in nature and the work of a researcher consists in finding the most appropriate method of data gathering for the purposes of research.

Daughter succession is a specific area where the use of qualitative methods at this point provides interesting results. It comprises results from parenting areas: next generation perspective on succession and women in family firm; however, it is separate area as it has its own topics and themes.

Given the progress researchers have already made during the last two decades, in future the area can gain from use of qualitative, quantitative and mixed methods.



## Appendix

**Table 1**  
Articles found, topic: “daughters` perspective on succession in family firms”

Author, year	Objective	Times cited*	Method
Dumas, C. (1989) <i>Family Business Review</i>	Daughter succession	147	Qualitative, 40 in-depth interviews with 18 firms
Dumas et al. (1995) <i>Family Business Review</i>	Succession; gender	70	Qualitative, 30 in-depth interviews (15 women)
Dumas, C. (1998) <i>Family Business Review</i>	Women different roles incl. daughters	86	Quantitative
Curimbaba, F. (2002) <i>Family Business Review</i>	Daughter succession	82	Qualitative, 12 open-ended, in-depth interviews
Vera, C. & Dean, M. (2005) <i>Family Business Review</i>	Daughter succession	125	10 interviews
Pyromalis et al (2006) Handbook of research on family business	Succession; gender	16	Qualitative, Analytic Hierarchy Process (AHP)
Wang, C. (2010) <i>Journal of family and economic issues</i>	Daughter succession	12	Meta-analysis
Otten-Pappas, D. (2013) <i>Journal of Family Business Management</i>	Daughter succession	0	Qualitative, interviews with 6 women CEO
Humphreys, M. (2013) <i>Journal of Family Business Management</i>	Daughter succession	1	Qualitative, 14 interviews
Overbekea et al. (2013) <i>Journal of Family Business Management</i>	Daughters who did not enter family firm	0	Qualitative, semi-structured interviews with successor and non-successor daughters/sons, total 21
Remery, C. et al. (2014) <i>Journal of Family Business Management</i>	Daughters who did not enter family firm	0	Quantitative

Source: own elaboration

\*According to Google scholar



**Table 2**  
**Articles found, topic: “women in family firms”**

Author, year	Objective	Times cited*	Method
Salganicoff, M. (1990) <i>Family Business Review</i>	Women in family firms: challenges and opportunities	147	Mixed, incl. survey 91 female participants
Dumas, C. (1998) <i>Family Business Review</i>	Women and family firms: roles	86	Quantitative
Cole, P. (1997) <i>Family Business Review</i>	Women in family firms: challenges	174	Qualitative, 23 in-depth interviews (women and men from same business)
Danes, S. & Olson, P. (2003) <i>Family Business Review</i>	Women in family firms: role of wife	119	Quantitative, 391 family couples
Haberman, H., & Danes, S. (2007) <i>Family Business Review</i>	Women working in family firms	79	Mixed
Jimenez, R. (2009) <i>Family Business Review</i>	Women involved in family firm	56	Meta-analysis of 48 articles

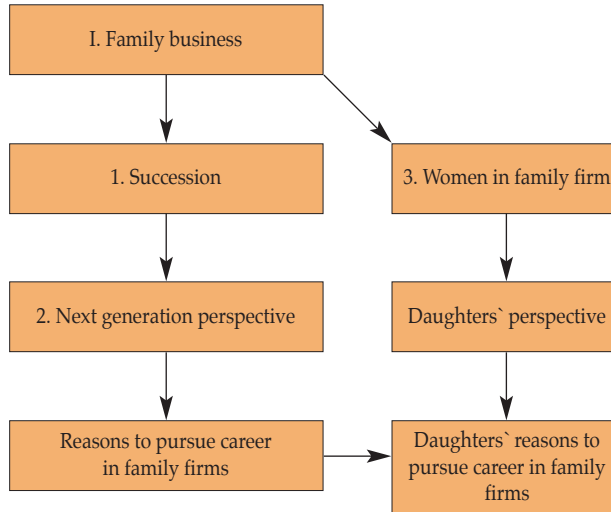
Source: own elaboration

**Table 3**  
**Articles found, topic: “next generation perspective, systematic review”**

Author, year	Objective	Times cited*	Method
Stavrou, E. (1998) <i>Family Business Review</i>	Succession	83	Meta-analysis
Miller, D. (2003) <i>Journal of business venturing</i>	Problematic succession	311	Qualitative
Sharma, P. & Irving, P. (2005) <i>Entrepreneurship Theory and Practice</i>	Succession	230	Qualitative
Ventler et al. (2005) <i>Family Business Review</i>	Succession	182	Quantitative
Stavrou et al. (2005) <i>Journal of Small Business Management</i>	Succession	45	Quantitative
Lambrecht & Donckels (2008) <i>Handbook of research on family business</i>	Successful Succession	14	Qualitative Case
Mazzola et al. (2008) <i>Family Business Review</i>	Succession	67	Qualitative 11 cases
Zellweger et al. (2011) <i>Journal of Business Venturing</i>	Succession, entrepreneurship, employment	84	Quantitative

Source: own elaboration

**Table 4:**  
**Scheme of inter-relation of topics raised in this article**



Source: own elaboration

## Notes

- <sup>1</sup> Shiva, V. (1997), p. 25.
- <sup>2</sup> Shiva, V. (2006), p. 22.
- <sup>3</sup> TEEB (2010).
- <sup>4</sup> Shiva, V. (2006), p. 25.
- <sup>5</sup> Shiva, V. (1995), p. 40.
- <sup>6</sup> Shiva, V. (2005).
- <sup>7</sup> Shiva, V. (2005).
- <sup>8</sup> Cfr: Shiva, V. (2005).
- <sup>9</sup> Francisco (2013c), n°s 188 y 220.
- <sup>10</sup> Francisco (2013c), n° 188.
- <sup>11</sup> Juan Pablo II (1987), n° 28.
- <sup>12</sup> Francisco (2013c), n° 62.
- <sup>13</sup> Shiva, V. (2001a), p. 164.
- <sup>14</sup> Benedicto XVI (2009), n° 33.
- <sup>15</sup> Francisco (2013c), n° 220.
- <sup>16</sup> Francisco (2013c), n° 53.
- <sup>17</sup> Cfr: Shiva, V. (2006), p. 22.
- <sup>18</sup> Cfr: Shiva, V. (2004), p. 97.
- <sup>19</sup> Shiva, V. (2003), p. 101.
- <sup>20</sup> Benedicto XVI (2009b), p. 33.
- <sup>21</sup> Shiva, V. (2003) p. 97.
- <sup>22</sup> Benedicto XVI (2009b), n°4.
- <sup>23</sup> Shiva, V. (2001b), p. 2.
- <sup>24</sup> Cfr: Shiva, V. (2005), p. 56.
- <sup>25</sup> Benedicto XVI y Bartolomé I, 2006
- <sup>26</sup> Francisco (2013c), n° 63.
- <sup>27</sup> Francisco (2014a).
- <sup>28</sup> Francisco (2014b).
- <sup>29</sup> Francisco (2013c), n° 215.
- <sup>30</sup> Benedicto XV (2009), n° 21.
- <sup>31</sup> Benedicto XV (2009), n° 48.
- <sup>32</sup> Shiva, V. (2006), p. 166.
- <sup>33</sup> Shiva, V. (1995), p. 89.
- <sup>34</sup> Shiva, V. (2001a), p. 7.
- <sup>35</sup> Cfr: Juan Pablo II (1987), n° 28.
- <sup>36</sup> Benedicto XVI (2009), n° 39.
- <sup>37</sup> Cfr: Benedicto XVI (2007).
- <sup>38</sup> Cfr: Benedicto XVI (2010) n°2.
- <sup>39</sup> Benedicto XVI (2007).
- <sup>40</sup> Cfr: Juan Pablo II (1987), n° 40.
- <sup>41</sup> Benedicto XVI (2009), n° 21.
- <sup>42</sup> Francisco (2013a).
- <sup>43</sup> Francisco (2013b).
- <sup>44</sup> Francisco (2013c), n° 215.
- <sup>45</sup> Francisco y Bartolomé I (2014), n° 6.
- <sup>46</sup> Juan Pablo II (1990), n°13.
- <sup>47</sup> Benedicto XVI (2010), n°9.
- <sup>48</sup> Benedicto XVI (2008).
- <sup>49</sup> Francisco (2013c), n° 215.
- <sup>50</sup> Cfr: Juan Pablo II (1987), n° 26.

<sup>51</sup> Comisión Mundial del Medio Ambiente y del Desarrollo. (1988), p. 67.

<sup>52</sup> Shiva, V. (2006), p. 173.

<sup>53</sup> Juan Pablo II (1990), n° 13.

<sup>54</sup> Benedicto XVI (2009), n° 51.

<sup>55</sup> Francisco (2013c), n° 60.

<sup>56</sup> Francisco (2013c), n° 212.

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