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IMPORTANCE OF THEORY IN QUALITATIVE ENQUIRY

Sally Shaw

Introduction

When I was asked to write this chapter my immediate reaction was, ‘what a strange request’. Surely we all know why theory is important and why it is central to academic research. It is, as I often tell my students, the difference between a chat in the pub and an academic discussion. There have been many debates and special issues on this exact question, most recently in Sport Management Review in 2013. So, I thought, why have this conversation when the importance of theory is fundamental, discussion over, job done?

Reflection is a wonderful thing. Once I’d had a chance to think about the editors’ request, some ideas began to percolate. The question changed a little in my mind, to ‘why is it that we need to keep this conversation about theory in sport management going?’ and ‘what can that conversation offer us?’ My perspective changed, revealing a desire not just to answer the question ‘why is theory important?’ but also what can theory offer us in our quest to do better research with outcomes that are connected to our field of practice, and that stretches us beyond our normal range of intellectual engagement in sport management? What is theory’s capacity within qualitative approaches to sport management and how can we harness and develop that capacity?

There is no doubt in my mind that we need to use theory to challenge ourselves to engage better with the raft of methodological opportunities open to us. Qualitative researchers in sport management rely heavily on case studies, usually formed through semi-structured interviews and focus groups. Such research has taken us to a certain level of knowledge but we can go further. With this in mind, I will attempt to examine the following in this chapter. First, while reluctant to get mired in the ‘what is theory?’ question, I will provide a brief outline of my perspective on theory for the purpose of this chapter, along with an overview of recent sport management research using qualitative research. I will then discuss the purpose of theory in qualitative research and the potential for developing its capacity. In the final section, I will unpack my crystal ball and outline a utopian future of research, in which multiple theoretical and methodological approaches are interlinked in sport management research, regardless of qualitative or quantitative approaches.
A perspective on theory in sport management

I stand by my comment above that theory is what differentiates a chat about sport in the pub or the coffee bar from an academic discussion. This is hardly an academic definition but it allows us to start to put the argument together that theory is something different from the everyday. We know that we are not just describing when we engage in theory; rather, we are analysing or examining something that we find interesting in sport (Doherty, 2013). Simply, it ‘explains how things work and why’ (Doherty, 2013, p. 5). So far, so good. I start to diverge from both Cunningham’s (2013) and Doherty’s (2013) definitions of theory, however, when the discussion turns to testing. Testing implies an objective measure. This is impossible in qualitative research, as its job is to describe, analyse and explain. This process is undertaken by researchers interpreting participants’ experiences, whether through interviews, focus groups, ethnographic or auto-ethnographic engagement, pictorial analysis or a myriad of other methods. This may sound subjective, because it is. Contrary to the claims of many graduate students and faculty, this subjective process is not a limitation of the research; rather, it is a feature of qualitative research. We look for similarities and differences between themes and compare them with our chosen theory, not relationships among variables. We paint a picture of a social phenomenon to the best of our abilities, guided by the rigours of our research paradigm.

If not used for testing, then what is good theory in the realms of qualitative research? Doherty (2013) lists three characteristics of theory: the foundation of research, of teaching and of practice. I agree, in part, as theory is at the forefront of everything researchers do. Where I disagree is with the word foundation. Yes, theory is a key, integral part of qualitative research but is it the foundation, or is it something that is woven into the research as we progress? Do we need to identify our theoretical position before we start research and use it as an unshakeable foundation, or can we use theory more flexibly? Fink (2013) discusses her approach to theory, which involves finding out about the context of the topic being researched and then investigating what theories might be useful in analysing the topic. She outlines how the topics she has researched have been those that sustain her interest, not necessarily the most ‘fundable’ (Fink, 2013). I extend this again, and say that by having a solid knowledge about the research context before deciding what theory to use to analyse it encourages not only personal motivation but avoids a slavish adherence to one theory over others, when a previously unused theory, or combination of theories, might be more appropriate (Barbour, 2001). I argue that a stronger position is to choose a topic then examine theories to see which ones usefully explain it. We are not searching for the theory, rather one or many that may help us to understand a little bit more than we did.

To summarise, my position on theory in qualitative research is as follows. It makes us think in a different way from how we might in a casual conversation (Frisby, Maguire and Reid, 2009). It helps to explain social phenomena within sport management. It sets a rigorous framework through which we can examine similarities and differences between themes within our research. And finally, it is integral to the development of academic research: not only as a foundation, but as a feature that is woven in throughout the research. As with any weaving, there may be mistakes, changes of pattern or colour, or unpicking in order to create the pattern as clearly as we can. Theory gives us the opportunity to create a pattern, with the freedom to reflect as accurately as we can the vagaries and contradictions of our participants’ stories.

Theory and qualitative research in sport management

From 2011–13, twenty-eight articles using qualitative research were published in Sport Management Review, thirty-five in the Journal of Sport Management and seventeen in European
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Sport Management Quarterly. These figures represent a healthy engagement in qualitative research, in part due to the calls for such research by Amis and Silk (2005), Frisby (2005) and others, as well as a broader recognition of the value of qualitative research.

Multiple theoretical approaches were used in these articles, ranging from grounded theory (Warner and Dixon, 2011), gender theory (Hardin and Whiteside, 2012), resource dependency (Morrow and Robinson, 2013) and capacity theory (Casey, Payne and Eime, 2012), to name a few. How these theories were used differed, which raises an interesting point regarding the use of theory in qualitative research. For some (e.g., Fairley and Tyler, 2012), theory is distinct from method; that is, the theory is presented and the methods outlined but the connections between those sections, and in turn the discussion, are not fully articulated. For others (e.g., Spaaij, 2012), the theoretical framework is integrated into the method and discussion, an approach that I will expand on shortly.

I favour this latter approach as a reviewer and in my own research. A long time ago, my PhD supervisor, Professor Trevor Slack, told me that theory should be used as a framework (hence the term theoretical framework) for the whole project. As I have noted above, this theoretical approach does not need to be firmly decided at the start of the project. Indeed, a theoretical approach may change as the project progresses and its focus shifts. The theory we thought would help us answer our questions may not do so fully, so we may shift our focus into a complementary theoretical approach. For example, when I was writing my dissertation, I thought that a traditional gender theory would suffice for examining questions about gender relations in sport organisations. As I progressed, I realised that it would, to a point. If I wanted to explore the nuances of gender relations, however, and get into the murkiness of multiple masculinities and femininities, then I would need something more subtle. That is why I turned to discourse analysis. If we take this tack as scholars, it should be documented and explained, presenting an honest, consistent picture of our engagement with theory.

**The purpose of a theoretical framework**

In this section, I provide an overview of a theoretical framework’s utility. A project’s theoretical framework does three things for qualitative researchers: it integrates and strengthens methodological choices; it gives us rigour and close distance from our work; and it allows us to compare our work with others.¹

**Methodological choices**

At the beginning of the chapter, I suggested that theory is the difference between a chat in the pub and an academic opinion. Qualitative research is a process underpinned by personal choices based on gender, class, race, sexuality, culture and ethnicity, among other individual differences. Those personal choices include choice about theory and its relationship to method, or the tools we use to undertake our research. While method refers to the tools used to collect data, methodology is interwoven with theory, and the term is used by qualitative researchers to indicate a tight, symbiotic relationship (Denzin and Lincoln, 2000). For example, research on gender relations in sport organisations might be undertaken using a discourse analysis approach informed by feminism. It would be impossible to pull apart where the theory of feminism ended and the practice of discourse analysis started because feminism is integral to discourse analysis in this case.

It is therefore almost impossible to differentiate between theory and method. Discourse analysis, for example, is a methodology that is intrinsically bound to ideas of power. Yet it is also a
method and analytical tool. It allows researchers to bring their own political positions to research as well as a focus on the discourses that influence and are influenced by participants. Discourse analysis represents a framework that articulates power relations, examines them and possibly suggests alternative practices. Researchers who have used such an approach effectively include Annalies Knoppers and Anton Anthonissen. In particular, their work on gender in sport organisations has frequently asked different questions about women’s and men’s positions in those organisations (Knoppers and Anthonissen, 2008). For researchers such as Knoppers and Anthonissen, discourse analysis, with power at its centre, provides a platform on which they can acknowledge their career-long commitment to understanding gender and organisations.

The discourse analysis framework challenges researchers too, because power comes in multiple, complex and conflicting forms (Foucault, 1979). Researchers using this approach must recognise that the power dynamics and relationships that they observe may not always fit with what they believe or expect. For example, gender is not straightforward, and although we may expect men to have the upper hand in most sport organisations, there are other social dimensions, such as race, sexuality, disability and class (Frisby, 2011), and structural dimensions, such as funding, sponsorship appeal or policy decisions, which may ensure that men are marginalised within their organisations (Kihl, Shaw and Schull, 2013). Theory, in this case discourse analysis, makes us think about our choices of method and analysis, challenge ourselves and recognise and value the times when our research doesn’t quite fit the way we thought it might.

Rigour and theory

In qualitative research, methodology’s unique relationship between theory and method enables rigorous research. Rigour is often confused with objectivity and validity, which have little bearing in qualitative research. Qualitative researchers cannot claim objectivity or validity because ‘we have no direct knowledge of our accounts and thus no independent entity to which to compare these accounts’ (Maxwell, 1992, p. 283). Our research cannot be validated against an objective measure because there isn’t one. Importantly, we shouldn’t go looking for one. Some qualitative researchers will try to reproduce quantitative procedures by having independent researchers outside the interviewing team check their coding or thematic development. This is a pointless exercise because the purpose of qualitative research is to represent what was said or done in data collection as accurately as possible. If an independent expert was not present at the data collection, they cannot validate the findings. The only people who can come close to validating anything are the participants themselves, and even their accounts may change over time. We need to accept this and not force our data into non-existent validity.

What qualitative researchers can do, however, is ensure descriptive rigour; that is, compare one participant’s experiences against another, take field notes to ensure that context is clear, and have the participants read transcripts for accuracy. Where there is disconnect or disagreement, they can comment on this as a feature of an individual’s recollections of events. This is a subjective process and researchers recognise that subjectivity in the form of individuals’ experiences (whether they are participants or the researchers) will influence a project. How else can we be interested, passionate, enthused or sometimes disillusioned or bored by our research? Why else would participants agree to be part of our research unless they had some personal or related interest? Acknowledging subjectivity, and working with it, is a strength of qualitative research.

This is where the use of theory becomes vital. Theory means that the research process is not a ‘free for all’ of opinions, ideas and agendas. Indeed, qualitative researchers need to be acutely aware of their position as researchers in order to conduct rigorous research, so that
their ‘personal baggage [that is] emotional, political and intellectual positioning’ (Knowles, 2006, p. 403) is acknowledged and worked into the research but does not take it over.

A notable example of this is Hoeber and Kerwin’s (2013) self-ethnography as female sport fans. The authors diligently present their position as researchers and fans as they investigated the phenomenon of female sport fans. Hoeber and Kerwin have multiple identities – as women, sport fans, critical researchers, wives and sisters. They argue that their identities put them in an enviable position to research female sport fandom (Hoeber and Kerwin, 2013). Their methodology was a narrative construction informed by theories of hegemonic masculinity. Hoeber and Kerwin shared their experiences, journals and thoughts with each other and opened themselves to mutual, theoretically informed critique. These processes gave the research rigour and credibility.

An area of particular interest with Hoeber and Kerwin’s work is the analysis of voice. Widening the discussion, White and Drew (2011) have described the pitfalls and difficulties of dealing with voice in qualitative research. They outline the dangers of the ‘romantic or literal notion of voice and taking at face value stories that are told by research participants. Here, voice and story are hived off as providing some sort of special truth rather than being subject to critical research analysis’ (White and Drew, 2011, p. 5). They highlight the importance of understanding the researchers’ role in creating knowledge by the questions they ask (or don’t), the topics that they choose at the start of the research, and the prompts and follow-up questions that they choose. Knowledge in qualitative research is not some single truth that is out there to be harvested. As researchers, we commit time and energy to shaping the kinds of knowledge that we expect and want to hear.

Qualitative researchers need to be able to examine and reflect on that process. White and Drew (2011) openly describe that they were ‘plagued by doubt and methodological unease’ (p. 3) as they began their study on young people’s social connectedness. What held them together, gave them confidence in their process and ultimately decided the success of the project was their commitment to a communal, reflective, critical theoretical framework to determine their approach to analyse voice. They did not strive to develop procedures to validate their data. Rather, their use of theory supported Maxwell’s (1992) argument. In this, Maxwell calls for the development of rigour ‘of an account as inherent, not in the procedures used to produce and validate it, but in its relationships to those things that it is intended to be an account of’ (Maxwell, 1992, p. 281). If qualitative research is to be accurate in its representation of data, then we are better served by ensuring our data represent participants’ views and analyse them with relation to theory, rather than testing them against arbitrary measures of reliability that have little to do with the context of our research.

**Close distance and theory**

It is not only researchers who benefit from theory in qualitative research. Much qualitative research has a critical, or even emancipatory, focus. It is conducted with participants who may see some value to changing their social, cultural or political position. There is some danger that researchers become so involved in such work that they lose the academic distance needed to ensure rigour. I call the protection of that distance, while recognising personal, political and social interest and connection to the research, close distance. A good example of this in sport research is Frisby, Reid, Millar and Hoeber’s (2005) and Frisby’s (2011) work with women on low incomes and immigrant women’s access to leisure. In both studies, Frisby and her team used a methodology informed by a feminist participatory action framework. While personally
and politically engaged in the work, feminist theory informed the methodology that enabled
the researchers to work towards describing some common themes with their participants and
also to recognise their own personal stance in the research (Frisby et al., 2005). Moreover, a
feminist-informed participatory action framework ensured that the participants were involved
in a partnership between the ‘people with problems to solve, the researchers, and those who
control public services’ (Frisby et al., 2005, p. 370). Feminist theory provided a framework for
participants and researchers alike. Participants were intrinsically involved in the project, giving
it more meaning for them and working towards their goals. Similarly, in her work with immigrant
women, Frisby (2011) created a project using feminist informed participatory action research,
in which those women set the research agenda with a view to influencing policy. Theory, in
these two cases, was used to provide a close distance to the research: recognising the connected-
ness and politicality of, and researchers’ closeness to, research but not allowing those features
to swamp its rigour.

Comparing our research with others’

Our research does not stand alone and the pattern that we weave as we undertake our research
needs to be able to be compared with other patterns, however disharmonious we think that
may look. This is not generalisability. Qualitative research does not normally seek to generalise
to a wider population; rather, it focuses on individuals’ expressions of their experiences in a
given time frame. The use of theory does allow us to make comparisons across different projects
and paradigms. Williams (2004) has argued that if we acknowledge the potential for limited
comparisons, we may be able to expand the utility of qualitative research, by creating a larger
picture of our topic. He has argued for a much more open discussion about generalisability in
qualitative research, stating ‘it is rather like the attitude of the Victorian middle class to sex.
They do it, they know it goes on, but they rarely admit to either’ (Williams, 2004, p. 210).
If we do admit to it, we may be able to engage in a process that Williams (2004) has dubbed
‘moderatum generalization’, or moderate generalisation through qualitative research. These
generalisations depend on two features: the cultural and social similarities of the phenomenon
being investigated (e.g., funding of non-profit sport organisations in Commonwealth countries)
and ontological similarities. These generalisations (and I’m not sure I agree with them being
called generalisations, preferring the term comparisons) can only ever be moderate, they may
well change, and they cannot be considered long term (Williams, 2004).

Fairweather and Rime (2012) have extended Williams’ concept, arguing that cultural
modelling may provide an avenue for generalisation in qualitative research. They suggest that
research that analyses discourses that are evident in ‘taken-for-granted models of knowledge
and thought that are used in the course of everyday life to guide a person’s understanding of
the world and their behaviour’ (Fairweather and Rime, 2012, p. 478) may be open to com-
parison and generalisability with similar projects. Unhelpfully, however, they then note that ‘in
contexts in which such a claim is likely to be contested it may be necessary to provide additional
analysis to support such claims’ (p. 478).

I find Williams’ (2004) and Fairweather and Rime’s (2012) arguments fairly limited. They
shy away from showing how the complex, political, subjective world of qualitative work can
be improved by moderatum generalization. What they do show is a willingness to engage in the
discussion regarding generalisation, which seems to be missing from qualitative research. I think
that there is an added element to their ideas, which is the consistency of a theoretical approach.
If the theories used in a variety of research projects are justifiably compatible, then it makes
sense to me that some limited form of generalisation or comparison might be possible in qualitative
research. Conceptualising this approach and working towards achieving it may be one way to push this conversation forward.

In this section, I have outlined the usefulness of theory in contemporary qualitative research. Drawing on sport management and wider literature, I have shown how theory demands rigour and encourages us to define our close distance. It also allows us to compare our work with similar others. The arguments of Williams (2004) and Fairweather and Rime (2012) provide thought-provoking suggestions regarding the moderate generalisability of qualitative research. I see merit in this direction because it codifies what many of us already do; for example, making research-based suggestions for change is a form of generalisation. Their arguments are not yet fully developed, though, and I would like to see more engagement in theory’s place in this moderate generalisation. Finally, understanding theory as a tool by which we can rigorously interrogate our methodological choices and critique our own position is central to the enhancement of our choices regarding methods in qualitative research.

The crystal ball moment: theory and qualitative research in twenty years’ time!

To go forward, we need to move into a more imaginative, engaged and reflective space. Others in this book may argue that we need to develop sport-specific theory to investigate our field. Personally, I do not agree with this perspective. I think that while sport management has some unique factors – for example, the passion for a sport that often overrides normal business-making processes – it shares more similarities than differences with other organisations in the commercial, public and non-profit sectors.

So, I believe that we should utilise the theories that serve other disciplines well and adapt them when necessary for sport. For example, Hoeber and Kerwin’s (2013) and Kodama, Doherty and Popovic’s (2013) engagement with autoethnography as a theoretically informed methodology achieves this. Autoethnography is a well-established methodology. It allows authors to reflect on their position as a participant and observer; in these cases, as a fan or a volunteer (Hoeber and Kerwin, 2013; Kodama et al., 2013). It enables the research to account for the things that are often positioned as special in sport (Chalip, 2006); in this case, fandom and volunteering. There may, of course, be limits in how well some theories stand up to the application to sport, but that is how we create new theoretical knowledge: by identifying those limits and discovering where our research takes us as we try to investigate them. Is sport special? Yes, but only in the same way that other distinct organisational fields are special, too.

My point here is that if we spend too much time debating the specialness of sport and devising tricky ways to produce new theories, then we run the risk of chasing down false alleyways. To butcher a familiar metaphor: rather than the narrative (statistical) tail wagging of the conceptual dog, we may spend time and energy breeding a new type of designer conceptual dog that looks attractive but achieves little more than its old mongrel cousin.

The question that should drive the future of sport management research is not, ‘how can we develop theories to best understand our world?’ but, ‘what are the problems we are trying to examine?’ and ‘whose interests are served by our research?’. If we recognise that we are trying to examine problems that are of value to people working in sport, then the development of theory for theory’s sake becomes much less important than developing existing theories to better suit our research task. Theory may well develop as a result of this, but theoretical development is not the purpose of our research.

So, what are the theoretical approaches and methodologies with which we can we start? Critical Theory ensures that we examine, critique and offer alternatives to organisational norms
(Alvesson and Willmott, 1992). Post-structuralism critiques the very discourses, power relations and paradigms on which we base our assumptions about organisational life (Knoppers and Anthonissen, 2008). Hegemony examines power relations, specifically those of influential groups. These are only three approaches among many, that are highly critical of the norms of organisational life, and which lend themselves to the use of qualitative methods. They have all been used to some degree within sport management but none have been fully played out to see what the outcomes of their approach might be. For example, Frisby and I asked whether ‘gender equity could be more equitable’ (Shaw and Frisby, 2006, p. 483) and presented a fourth frame for putting critiques of gender relations into practice in sport organisations. Yet there has been no follow up regarding what that practice might look like. This is but one example of a good idea not pushing through to see whether it works in practice. In twenty years’ time, I would like to see this sort of project becoming commonplace.

Such a movement requires input from more than some interested academics. This research requires acceptance from organisations, whether the NCAA or governmental organisations such as Sport New Zealand, Sport England, The Australian Sport Commission or Sport Canada. Many of us know from previous experience that obtaining this sort of support can be problematic and political (McKay, 1997). Yet, change is possible. That change, though, must start with us; sport management scholars from all sides of the argument. If our research is going to be useful, then we need to work together to promote that research widely. There will always be paradigmatic and philosophical differences between and within qualitative and quantitative research groups. The debate is a useful one, pushing both sides to reflect on the rigour and applicability of their respective research. Stalling on this argument, however, does not benefit anyone and certainly does not progress our field.

At the beginning of this chapter, I asked what theory’s capacity was to develop qualitative research. A way of moving forward on this discussion (and bringing this chapter full cycle) is to go back once again to the analogy of theory being the difference between a casual conversation and academic endeavour. Qualitative researchers have a responsibility to ensure that our use of theory is as rigorous and informed as possible. In short, it helps us to do good research. Good research is not looking for praise for copying our quantitatively orientated colleagues and claiming authenticity for using procedures that have nothing to do with qualitative approaches. It is about using theory to create an argument that informs our methodology and analysis, and working with theory to ensure that we represent our data as thoroughly as possible. Working with our colleagues across the spectrum of sport management, we can support research that makes a difference using theoretically informed methods, whether they are qualitative or quantitative. By embracing difference in theories that challenge our research norms, we can stretch our boundaries and increase the relevance of our research. That is what I would like to see in twenty years’ time, and that is why I think theory is important to qualitative research.

References
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