



## Methods for the Study of Downsizing: A Review

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### Abstract

*There has been a world-wide increase in the incidences of downsizing practice across economies and across organizations. This has been considered as the basis for coping with increasing competition. The present paper looks into some studies on downsizing. The focus of the paper is majorly on the research methodology used in these studies. This paper analyses the methods used for the study of downsizing and suggests the ideal methods of study for: a) organizational outcomes, and b) individual outcomes, which include the victims, the survivors and the implementers. The suggestion is to have context specific and issue specific studies with more emphasis towards the triangulation of qualitative and quantitative methods to increase the soundness of the study.*

### Introduction

For economies like US, the 1990s have been a decade of downsizing. In reaction to the Japanese competition, many US organizations created organizational cultures based on flexibility, insecurity and temporary work contracts (Littler, 2000). Hence, came up the concept of delayering and downsizing of the workforce at a broad level across the organizations. Initiated in US later on, these strategies of organizational change diffused to other economies also as a major route to competitive success. Hence, downsizing also became one of the major interventions for organizational change across the economies and organizations (French & Bell, 2003).

### Scope of the Paper

Since the adoption of downsizing as a major change strategy by the organizations world-wide, interest was generated amongst the researchers for its study. The downsizing

process, its antecedents and consequences were studied at different levels. The levels of analysis varied from individuals (see Brockner et al. 1986, 1987, 1988, 1990, 1992, 1993, 1994, 1996, 2004; Allen et al., 2001; D’Cruz, 2005; Noronha & D’Cruz, 2006) to organizations (see DeWitt, 1993; Littler, 2000) and to economies (see Rama & Newman, 2002) also. The present paper looks into different methods and methodologies used by the researchers to study downsizing. Methodology is the study of methods and deals with the philosophical assumptions underlying the research process, while a method is a specific technique for data collection under those philosophical assumptions. Sinnett (1987) differentiated methods and methodology by defining method as “*the way people do things*” and methodology as “*their understanding of the way they do things*”. There is an attempt to give an in-depth analysis of the methods and methodologies used in the study of downsizing. The focus of present paper is only the methods of study adopted for the impact of downsizing over the individuals or the organizations. The research methodology used to study downsizing on a nation level / policy level is different from the methodology used for organizational/ individual level. Hence, the level of analysis on a nation level is beyond the scope of this paper.

### **Method of Review**

This is basically a conceptual study that attempts to understand existing research in the area and draw inferences from the same and hence the study relies solely on existing research in related subjects. The literature was reviewed to understand the present status of conceptualization followed by inferences and conclusions drawn in light of these theoretical perspectives. It should be noted that for the purpose of this study the terms ‘downsizing’ and ‘layoffs’ have been used interchangeably.

For the literature search a computerized bibliographic search was conducted in the databases of EBSCO, Proquest, Kluwer, OPAC and Science Direct. Other than that some classics on research methodology and books on downsizing were read from the institute’s library. There was an attempt to apply the previous knowledge of the research methodology courses also.

## Downsizing

Downsizing is defined as a “purposeful reduction in the size of an organization’s workforce” (Spreitzer & Mishra, 2002). Brockner (1988) categorically states that it refers to permanent, involuntary separation of employees. According to Freeman & Cameron (1993) also, downsizing is not something that happens *to* an organization, but is something that some of the organization members (top management *per se*) undertake purposively. The key attributes of downsizing given by Freeman & Cameron (1993) are as follows:

- a) It is an *intentional* endeavor
- b) It usually involves *reductions in personnel*
- c) It is focused on improving the *efficiency* or *effectiveness* of the organization
- d) It affects *work processes*

Sometimes also termed as rightsizing, reorganization, restructuring, delayering, and rationalization, downsizing is seen as an important techno-structural Organization Development (OD) intervention (Cummings & Worley, 2001). Downsizing may involve, one or many of the following processes,

- a) Loss of individual security, owing to layoffs and job losses
- b) Emergence of new organizational form
- c) Re-allocation of resources and power
- d) Increased expectations, responsibilities and workload and need to re-learn and develop new skills among survivors of the exercise, and
- e) Redundancy among those who do not get laid off (the survivors)

## Study of Downsizing

A number of studies have investigated various aspects of downsizing, such as cutback decision processes or the effects on individuals (Brockner et al., 1987; Freeman & Cameron, 1993). Others have looked at aspects of decline, such as the need for increased management skills (Sutton et al., 1986; Freeman & Cameron, 1993). But there does not yet exist a comprehensive framework of downsizing, including implementation processes and their impact at the organizational level.

It can be noted that most studies on downsizing focus on antecedents of downsizing (e.g. Brockner, 1988) or its outcomes on victims (e.g. Brockner, 1988). Overload, burnout, inefficiencies, conflict, and low morale are possible consequences (Brockner, 1988), or more positive outcomes may occur such as improved productivity and speed. Moreover, some downsizing activities may include restructuring and eliminating work (like discontinuing functions, abolishing hierarchical levels, merging units and redesigning tasks) which lead to some kind of organizational redesign. Regardless of whether the work is the focus of downsizing activities or not, work processes are usually influenced one way or another by downsizing. Some studies have been conducted on the effects of on individuals and groups (see Brockner, 1988), but investigations of the processes and outcomes of downsizing at the organizational level have been rare. Both the empirical and the normative literature need a greater emphasis on the *process of downsizing* (Freeman & Cameron, 1993). Most empirical studies tend to take a static view of downsizing, and only a few authors have paid any attention to the processes by which downsizing can be accomplished. There is a dearth of information about expected relationships between downsizing processes and other important organizational variables like the change in organizational structure, processes and technology after the implementation of downsizing.

Research has shown that the impacts of downsizing are evident on three classes of individuals in an organization (Noronha & D'Cruz, 2006):

- a) Victims (those who are separated from the organization)
- b) Survivors (those who are left in the organization after the completion of the downsizing process)
- c) Implementers (those involved in executing the downsizing intervention in the organization)

Some of the well-researched effects of downsizing include reduced job involvement (e.g., Allen et al., 2001), withdrawal (e.g., Brockner, 1988), reduced performance (e.g., Brockner, Grover, Reed & DeWitt, 1992) and reduced attachment with the organization (Spreitzer & Mishra, 2002). Downsizing has also been studied as a violation of the psychological contract (Spreitzer & Mishra, 2002). Downsizing refers to involuntary

layoff of employees and is posited to have several positive as well as negative consequences also. Positive consequences involve increase in efficiency as well as decrease in personnel cost whereas negative consequences include but are not limited to personal loss, burnout, anxiety (Kets De Vries & Balazs, 1997), reduced commitment to the organization (Brockner, Konovsky, Cooper Schneider, Folger, Martin & Bies, 1994) and reduced self-esteem of the survivors (Wiesenfeld et al., 2001). Hence, downsizing interventions almost inevitably face stiff resistance from the employees, which manifest through absenteeism and lowering of motivation and productivity (e.g. Paterson & Cary, 2002).

### **Research Methodologies**

As mentioned earlier, research methods can be taken as a subset of research methodology. Therefore, in this section we will discuss the broader term- methodology, which will have methods as a component to it.

Organizational research is an intricate process. Daft (1983) used the metaphor ‘craft’ and ‘storytelling’ for the organizational research process. The researcher needs to explain what the data mean, using data to describe how organizations work. For this the first condition is that the researcher needs to be creative (Weick, 1974; in Daft, 1983).

In research, the proper assessment of the research method to be used by the researcher becomes very important for a sound study in any area. The impact of the management studies greatly depends on the appropriateness and rigor of the research method chosen (Scandura & Williams, 2000). The research methodologies are broadly categorized in two groups:

- a) Quantitative Techniques
- b) Qualitative Techniques

Both methods have their own advantages and disadvantages. Quantitative research is the natural science model of research (Daft, 1983). This is a positivist (Crotty, 1998) way of looking at things. This approach assumes that social reality is a concrete, measurable phenomenon. The supporters of this approach strictly emphasize on reliability and validity as the only yard-sticks for accurate measurement. On the other hand, qualitative

research is more concerned with the meaning and interpretation of data rather than the measurement of organizational phenomena (Daft, 1983). Organizations are assumed to be enormously complex social systems which also keep on changing. Hence, the approach to study the organizational phenomena needs to be different. Qualitative research procedures assume that organization realities are not concrete. The supporters of qualitative research techniques promote that direct involvement to understand the organization phenomena is necessary to understand it properly. Qualitative researchers are also likely to deal with each research setting as a unique case, assuming that each organization has a unique organizational environment and dynamic history. Qualitative researchers like Glaser & Strauss (1967) suggest that systematic collection and comparison of diverse cases can be a powerful means to develop and test grounded theories. Instead of adopting a quantitative approach that aggregates data across different organizations, a qualitative study that systematically compares similarities and differences in patterns of interactions, the resulting meanings of the key variables, and their influences on organizational outcomes might reveal some other important setting factors and dynamics that influence and are influenced by employees' perception about a phenomenon (Bartunek & Seo, 2002).

There are basically four dimensions under which the soundness of the results of any study is tested. Cook & Campbell (1976) gave four types of validity for such assessment:

- a) **Internal Validity:** It refers to the causality. A cause and effect relationship can only be asserted if there is true covariation between the variables under investigation. Internal validity means that the procedures used to gather data demonstrate that the cause preceded the effect; and alternative explanations have been discarded (Scandura & Williams, 2000).
- b) **External Validity:** It refers to the generalizability across times, settings, and individuals. External validity relies upon establishing a true representation of the relationship between two constructs and establishing that the relationship is generalizable to different populations, measures, and circumstances.
- c) **Construct Validity:** It refers to how well the measures employed fit the theories for which a test is designed.
- d) **Statistical Conclusion Validity:** It refers to the ability to draw conclusions on the basis of statistical evidence of covariation as well as prediction.

There are certain issues in selecting the method of study in the field of management. Sometimes the researchers choose the method of study for wrong reasons also. The research of Scandura & Williams (2000) shows that one of the reasons for the popularity of certain methods among the researchers is the urge to publish their study in the three top-tier general management journals namely *Academy of Management Journal*, *Administrative Science Quarterly* and *Journal of Management*. Due to the charm to publish in these journals researchers are increasingly employing research methodologies that compromise the fit of the method with the phenomenon to be studied.

### **Methodology used for the Study of Downsizing**

Different researchers have used different quantitative and qualitative methods for the study of downsizing. The methodology used by researchers depended mostly on their levels of analysis and the aspects they wanted to touch upon in their study. For example, major research work on the effect of downsizing and layoffs over the individuals (victims as well as survivors) is done by Brockner and his colleagues. For this purpose they have used different methodologies in different studies. Some studies were solely based on the laboratory experiment (see Brockner et al., 1986), some on field study (see Brockner, Grover, Reed, DeWitt, 1992) whereas some others were based on survey method (see Bies, Martin & Brockner, 1993; Brockner et al., 1994; Bennett, Martin, Bies & Brockner, 1995; Wiesenfield et al., 2001). In some other studies they have triangulated the methods by combining the lab method as well as the field study (see Brockner, Wiesenfield, Reed, Grover, & Martin, 1993; Brockner, Grover, O'Malley, Reed, Glynn, 1993; Brockner, Grover, Reed, DeWitt, O'Malley, 1987). These are just a few examples of the studies done in this area. The other methods used by researchers include case studies, longitudinal studies, cross-sectional studies, qualitative studies and a combination of these methods as well. Each method has its own merits and de-merits. In the next section, the paper will discuss each methodology separately in the context of downsizing for different levels of analysis like the organization and individual levels.

#### **A) Laboratory Experiment**

The laboratory experiment method brings participants into an artificial setting for research purposes. In their study, Brockner et al. (1986) did a lab experiment over



undergraduate students, where they tested the effects of layoffs on the survivors. The study assessed the subjects' work performance as a function of whether a co-worker had been laid off and the circumstances of that layoff. According to McGrath (1982) this method maximizes precision in measurement of behavior. But the trade-offs are low generalizability and low realism of context. This method is not replicable in all studies and contexts. In fact, Brockner et al. (1986) also suggested in the last part of their study that this type of research should be done in a more naturalistic setting where the individuals have more at stake. This will help in increasing the external validity of the study.

## **B) Field Study**

The field study investigates behavior in its natural settings. Primary data is collected by the researcher. In their study, Brockner, Grover, Reed & DeWitt (1992) conducted a field study to explore the relationship between the job insecurity associated with a layoff and the work effort of survivors. This study was conducted in a chain of small retail stores throughout the US. Results supported the predictions of the study, but the methodology had its own limitations. In the study, the independent variables (job insecurity and economic need to work) and dependent variables (work effort and worry) were measured on the same questionnaire, a procedure that raises the possibility of problems associated with common method variance. This can pose validity threat to the study. This method maximizes realism of context as compared to the laboratory experiment since it is conducted in the real field setting, but it can be low on precision of measurement and control of behavioral variables because there is a lack of experimental control (McGrath, 1982). Results of one downsizing study in one context can be different from the results in another context because of the contingent factors. This method can also be low on generalizability to the population. These limitations can be overcome by doing some manipulations to such studies. For example, the study by Brockner et al. (2004) overcomes this limitation to some extent by doing two field studies: a) a cross sectional study consisting of two groups of employees of a single organization, b) the same group of the employees before and after the layoff. This method helped in removing the doubts about the internal validity in the first study by doing the second study.

### **C) Survey Method**

Questionnaire survey method is a purely quantitative method of study. This method implicitly assumes that the predefined variables have the same meaning across multiple settings and to multiple respondents (Bartunek & Seo, 2002). Several studies on downsizing depend on the survey method. Some studies by Bies, Martin & Brockner (1993); Brockner et al. (1994); Bennett, Martin, Bies & Brockner (1995); Wiesenfield et al., (2001); Littler, 2000; Tzafrir & Eitam-Meilik (2005) and Allen et al. (2001) are good examples of this method of study on downsizing. This method maximizes the representative sampling of the population units studied. It can be viewed from the point of view of Comte's positivism (Crotty, 1998). This method maximizes population generalizability but is low on realism of context and precision of measurement (McGrath, 1982).

### **D) Case Study**

Case study research takes into account the real life context. It considers the wholeness of the situation and is a way of organizing data so as to preserve the unitary character of the social object being studied (Sahdev, 2004). Unlike the survey method, which generates the data in numeric that are generally statistically significant but often fall short in relating the findings to the actual context, case study method has the benefit of applying the findings in real life (Sahdev, 2004). This method allows for in-depth analysis of various issues. Study done by Sahdev (2004) took the help of this method to study the 'survivor syndrome' post-downsizing. For this, the researcher did two case studies and based on that derived the conclusions. Data were collected with the help of primary sources (one-to-one interviews), secondary sources (analysis of company documents) and focus groups. The focus of case study method is more on depth rather than on breadth. The disadvantages of this method as compared to other methods are that: a) It is time consuming, b) the interpretation of the data needs high skill level from the researcher, and c) it is context specific as it defines the issues for a specific point of time. Hence, in order to increase the generalizability of the results the longitudinal case study needs to be done. In some other studies (D'Cruz, 2005; Noronha & D'Cruz, 2006) the case method is adopted for the study, but the approach is based on Van Manen's (1998) hermeneutic phenomenological approach. The basic problem with this method is that no precise methodology exists for phenomenological researchers (in Sanders, 1982). Hence, there is

no prescribed rule set or guide for the researcher. The researcher has to get his / her hands dirty with the experiences of his / her own. The method varies according to the particular phenomena being researched. Hence, it needs high level of understanding about the phenomenon to be studied by the researcher.

### **E) Mixed Methodology**

McGrath (1982) concludes that an unflawed study is not possible. Any method chosen will have its own pros and cons and the choice of that method will limit the conclusions that can be drawn. Hence, the necessity to obtain evidence from using a variety of methods arises. The use of a variety of methods to examine a topic might result in a robust and generalizable set of findings or higher external validity. This is known as the mixed methodology of research. This is one of the ways to handle trade-offs in the study and hence the term 'triangulation' was coined. Triangulation can be employed for the purposes of measurement, data collection or research strategy. McGrath (1982) categorized research strategies into eight types: formal theory, sample surveys, laboratory experiments, judgment tasks, computer simulations, experimental simulations, field studies, and field experiments. Each strategy has its own advantages and disadvantages. It depends on the researcher what stand he / she takes while triangulating.

Some researchers (e.g. Brockner, Grover, Reed, DeWitt & O'Malley, 1987; Brockner, Grover, O'Malley, Reed & Glynn, 1993; Brockner, Wiesenfeld, Reed, Grover & Martin, 1993) mixed the methodology of lab experiment and field study in their study of downsizing. This helped them in eliminating the validity threat generated due to the common method variance of one method.

### **Suggested Methodology**

The previous section covered some of the studies done on downsizing. The methods used by the researchers for these studies were analyzed. It is seen that no single method is able to give the comprehensiveness and concreteness to the study simultaneously. The purpose of the study should be the guiding force behind the choice of the proper methodology of the study. As seen in the literature review of downsizing, the process of downsizing has multiple effects. It affects the organizational structure and organizational

processes as well as the individuals (victims, survivors and implementers). Each category should be treated separately for the study. For example, the study for organizational outcomes of downsizing should use a different methodology than the study for individual outcomes. Following are the suggested methodologies for each of these categories:

### **A) For Organizational Outcomes**

In an organizational context, downsizing is seen as a process which brings change in the organization. The related literature in the field treats it as dynamic in nature. In such context **longitudinal and comparative case study method across and within the organizations** is suggested. Researchers like DeWitt (1993) and Pettigrew (1992) also advocated this method in such cases. This is because as mentioned earlier, downsizing is a change process which contains multiple activities in itself. The rationale is that to understand a change process it is necessary to analyze the inner and outer context of the organization. Here, outer context includes the economic, social, political, competitive and sectoral environments in which the organization is located and the inner context refers to the structure, culture, and the internal political environment of the organization. Processes are embedded in their contexts and can be studied well only in that particular context. There is also the temporal interconnectedness among the events in a process. For a process researcher, understanding the sequence and flow of events over time becomes a crucial requirement. Hence, there is a need to study such phenomena across times and contexts. The observation of multiple organizations and environments over time captures variations in organizational and environmental characteristics. This will help in formulation of dynamic theories and process hypotheses, which is a crucial component in longitudinal research. The framework requires the theorist to address six dimensions of the process (Monge, 1990): a) continuity, b) magnitude of change, c) rate of change, d) trend, e) periodicity, and f) duration. Alternately, Van de Ven & Huber (1990) suggest the following methods to observe the organizational processes like downsizing in the field: ethnographic methods, longitudinal and comparative case studies, event history analysis, and real time tracking of events as they occur over time.

### **B) For Individual Outcomes**

The methods used for the individual outcomes should be different from the methods used for the organizational outcomes. For studying the individuals quantitative or qualitative any method can be adopted- depending on the issues to be studied. The choice should be

based on what issue is going to be handled. Quantitative research generally gives concrete data, which may provide results that are statistically sound and high in reliability. In contrast, qualitative approaches attempt to increase understanding of local perceptions, to ‘explicate the ways people in particular settings come to understand, account for, take action, and otherwise manage their day-to-day situations’ (Bartunek & Seo, 2002). A qualitative approach might lead the researcher to attend in depth to local actors’ understandings of downsizing. It might also help to gain understanding of the dynamics associated with the concept. In doing the quantitative research, researchers generally predefine the key variables about a phenomenon, based on previously developed theories and scales. In doing so, the researchers make a strong implicit assumption that the researcher and the research participants share similar meanings about the key variables. Sometimes there is disagreement among different researchers about the definition of the concept, so what if the respondents understand the meaning of the concept differently than what the researcher means. What if different respondents’ meanings differ from each other? These are the intricate questions which are not easy to answer only on the basis of the quantitative research. It is quite possible that for some key construct groups of organizational members develop their own shared meanings, which might differ from meanings developed by external researchers. This sometimes happens across different cultures. Such a discrepancy can be an important threat to the content validity of a construct. Hence, it becomes important to understand how organizational members understand and make sense of the constructs in order to validate the academic definition in local contexts (Bartunek & Seo, 2002). The ideal way in such situations will be to triangulate the methods. Patton (2002) has defined four basic types of triangulation:

- a) *Data triangulation*: The use of variety of data sources in a study
- b) *Investigator triangulation*: The use of several different researchers or evaluators
- c) *Theory triangulation*: The use of multiple perspectives to interpret a single set of data
- d) *Methodological triangulation*: The use of multiple methods to study a single problem

Here, we are focusing on the last type of triangulation i.e. the methodological triangulation. In such triangulations, a rich variety of combinations are possible. The advantage of triangulation is that it overcomes the weakness of one method by the usage of another method. It increases the strength and soundness of the study.

Again, the methods used for different categories of the individuals can be different in nature. As mentioned earlier, there can be three categories of individuals involved in the downsizing process:

- a) Victims
- b) Survivors
- c) Implementers

**a) For Victims:** These are the individuals who will have to leave the organization after the intervention. Hence, any issue related to the victims need to be studied **longitudinally**- once before the lay-off and once after the lay-off. The method of the study can be quantitative like a survey method or it can be qualitative based on unstructured interviews. This will help in understanding the issue in a better manner.

**b) For Survivors:** Survivors are the individuals who remain in the organization even after the intervention is over. To understand the issues related to the survivors, their close behavioral study becomes important. For this, if the researcher adopts an approach where he / she can spend time with the survivors observing them and interpreting from their behaviors, the chances of getting more reliable results increase. The approach of **phenomenology** or **ethnography** is suggested in such cases. This will ensure the robustness of the study. Phenomenology and ethnography (Bartunek & Seo, 2002), although being quite time consuming can be good ways to do such studies. Ethnographic methods involve a series of field observations and informal conversations with the respondents through which the researcher gradually and extensively collect information on the informants' subjective systems of meanings. This method can be suitable to uncover cultural domains in a setting, the types of characteristics that comprise what a construct means there. Similarly, phenomenology focuses on exploring how individuals make sense of experience and transform experience into consciousness, both individually and as shared meaning (Patton, 2002). To understand the phenomenon like downsizing it becomes necessary to understand how individuals perceive their experience of the phenomenon. For this, in-depth interviews of the people who have 'lived experience' of the phenomenon is necessary.

**c) For Implementers:** Implementers are those individuals who are involved in executing the downsizing intervention in the organization. Generally, this category of individuals also remains in the organization even after the intervention. Although, the issues related to the implementers are different from the issues related to the survivors, yet due to their presence in the organization even after the intervention qualifies them to be survivors. Hence, the method of study for implementers can also be similar to the methods of study for the survivors.

## **Discussion**

There is variety of issues related to the downsizing intervention in the organizations. These issues can be studied by mono-methods: either quantitative or qualitative. This makes the approach of study simple, but questions the validity of the results. On the other hand, the complex approach of triangulating quantitative methods and the qualitative methods is ideal for the study of downsizing process and ensures the robustness of results. This enables the study to provide a multi-perspective view point and the results which are not only time specific and context specific. The purpose of the study for downsizing is to make the results generalizable to various contexts for the practitioners. Hence, there is a need for researchers to think about the ways to increase the generalizability of the results. Longitudinal and cross-sectional studies are the solution to this problem. The suggestion is to have context specific and issue specific studies with more emphasis towards the triangulation of qualitative and quantitative methods in order to increase the soundness of the study.

## **Limitations**

There are several studies done in the area of downsizing. Various issues related to the organizations and individuals are covered in these studies. This review is based on the methodology of only some of these studies. Although an attempt is made to cover as much variety as possible, yet it is very difficult to cover all dimensions of such vast field as downsizing. Hence, there is a possibility that some methods / issues might have missed from the analysis.

## Conclusion

As the work-place is changing at a fast pace due to technological advancements and other such factors, more and more personnel are getting redundant. Also, in order to achieve competitive advantage over others organizations are moving towards cost reduction. This is leading towards downsizing in organizations. It is a multi-dimensional process and each study reveals some new perspective related to the phenomenon. New issues are identified for study. Hence, the basic requirement for a researcher in this area is to have creativity in his / her approach. It is necessary to mix and match the approaches so that the results of the studies become more reliable and widely applicable.

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